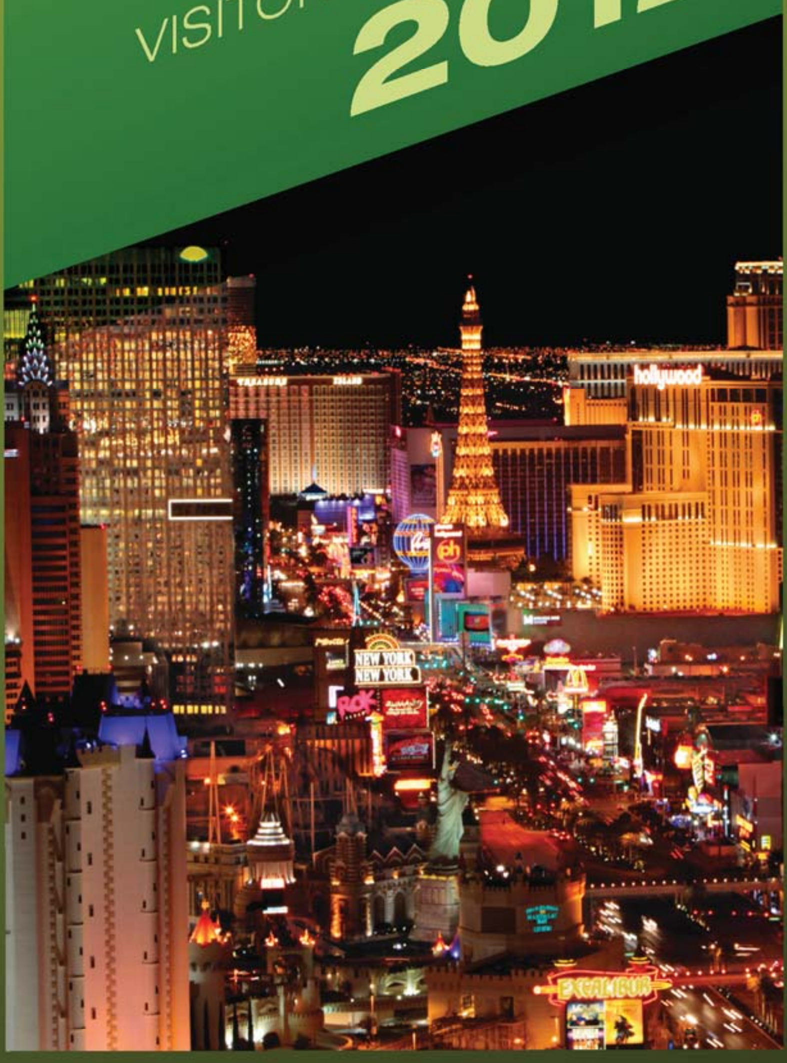
LAS VEGAS VISITOR PROFILE STUDY 2012



LAS VEGAS CONVENTION
AND **VISITORS AUTHORITY**

glsresearch

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116 New Montgomery Street
Suite 812
San Francisco, CA 94105
Telephone: (415) 974-6620
Facsimile: (415) 947-0260
www.glsresearch.com

San Francisco
Las Vegas

LAS VEGAS VISITOR PROFILE

Calendar Year 2012

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

3150 Paradise Road
Las Vegas, NV 89109-9096
(702) 892-0711
LVCVA.com
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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 in-person interviews GLS Research collected as follows: 3,600 from January 1, 2008 to December 31, 2008; January 1, 2009 to December 31, 2009, January 1, 2010 to December 31, 2010 January 1, 2011 to December 31, 2011; and January 1, 2012 to December 31, 2012. Approximately 300 interviews were conducted per month in 2008, 2009, 2010, 2011, and 2012.

This report presents the results of calendar year 2012, as well as the four previous years (2008, 2009, 2010, and 2011). 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.

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.

This section presents the research highlights. The findings are presented in detail beginning on page 12.

REASONS FOR VISITING — EXECUTIVE SUMMARY

Sixteen percent (16%) of 2012 visitors indicated they were first-time visitors to Las Vegas, down from 2010. Just under one-half (47%) of all visitors said their primary reason for visiting Las Vegas this trip was vacation or pleasure, up from 2008 and 2009, but down from 2010 and 2011. Eight percent (8%) said they came primarily to gamble, down from 2008 and 2009. Fourteen percent (14%) were visiting friends or relatives (up from 2008 and 2010). Among repeat visitors, 43% came for vacation or pleasure, 9% came to gamble, and 14% came to visit friends and relatives. The majority of first-time visitors continue to come primarily for vacation or pleasure (66%, up from 2008), with few (1%) saying they came primarily to gamble. Fourteen percent (14%) of first-time visitors said they were visiting friends and relatives, up from 2008, 2010, and 2011. Among all visitors, the average number of visits over the past five years was 5.8 (down from 2008, 2009, and 2011). Among all visitors, the average number of visits in the past year was 1.6, also down from past years.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2008	2009	2010	2011	2012
Proportion of visitors who were first-time visitors	16%	17%	18%	16%	16%
Proportion of visitors whose primary purpose for current trip was vacation or pleasure	39%	40%	51%	50%	47%
Proportion of visitors whose primary purpose for current trip was to gamble	13%	13%	9%	7%	8%
Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	11%	15%	11%	13%	14%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	36%	35%	47%	46%	43%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	15%	15%	10%	8%	9%
Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	12%	16%	12%	15%	14%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	57%	61%	69%	70%	66%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	2%	2%	1%	1%	1%
Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	9%	10%	8%	7%	14%
Average number of visits in past five years	6.8	6.5	5.9	6.2	5.8
Average number of visits in past year	1.8	1.7	1.7	1.7	1.6

TRAVEL PLANNING — EXECUTIVE SUMMARY

Fifty-seven percent (57%) of visitors in 2012 arrived via ground transportation and 43% arrived by air. Forty-seven percent (47%) of visitors said they used their own vehicles while traveling around Las Vegas, down from 50% in 2009. Twenty-nine percent (29%) reported taking a taxi (up from prior years), while 48% volunteered that they walked while in Las Vegas (also up from past years).

The proportion of visitors who reported using a travel agent to plan their current trip to Las Vegas was 13% in 2012, similar to past years. Visitors were asked if they used the Internet to plan their current trip to Las Vegas, and 60% said they had done so, a significant increase over 2008 – 2011. Of these visitors, two-thirds (66%) said they booked their accommodations online (up from 2008), while nearly one-half (47%) said they used the Internet to book their transportation (down from 2008 – 2011). Fifty-four percent (54%) said they found information online that influenced their choice of accommodations (up from 2008 but down from 2009).

The proportion of visitors who said they visited Downtown Las Vegas was 36%, down significantly from 2008 and 2010.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2008	2009	2010	2011	2012
Proportion of visitors who traveled to Las Vegas by ground transportation (automobile/bus/RV)	57%	58%	59%	56%	57%
Proportion of visitors who traveled to Las Vegas by air	43%	42%	41%	44%	43%
Proportion of visitors who used their own vehicle when traveling around Las Vegas	48%	50%	48%	49%	47%
Proportion of visitors who reported walking when traveling around Las Vegas	31%	22%	28%	25%	48%
Proportion of visitors who used taxis when traveling around Las Vegas	25%	21%	23%	24%	29%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Las Vegas	15%	13%	12%	13%	13%
Proportion who used the Internet to plan trip	44%	47%	53%	55%	60%
Proportion of visitors who used the Internet to book accommodations in Las Vegas	54%	69%	67%	69%	66%
Proportion of visitors who used the Internet to book transportation to Las Vegas	59%	58%	56%	54%	47%
Proportion of visitors who used the Internet and said it influenced their choice in accommodations	49%	58%	52%	52%	54%
Proportion of visitors who visited Downtown Las Vegas on their current trip	46%	38%	45%	34%	36%

TRIP CHARACTERISTICS AND EXPENDITURES — EXECUTIVE SUMMARY

The average party size in 2012 was 2.4 persons, up from 2011. Eleven percent (11%) of visitors had children under the age of 21 in their immediate party, up from 2008 – 2010 results. Virtually all visitors (99.7%) stayed overnight.

Visitors in 2012 stayed an average of 3.3 nights and 4.3 days in Las Vegas, down from 2008 – 2011. Among overnighters, 96% stayed in a hotel or motel, with an average of 2.1 room occupants (up from 2010). Visitors spent an average of $93.13 per night on lodging this year, up significantly from 2009 – 2011. One-third (32%) of visitors staying in a hotel or motel paid a regular room rate, up from 2009 – 2011. Fourteen percent (14%) purchased a package trip, down from 18% last year. The average cost of such a package in 2012 was $743.65, up significantly from $640.29 in 2009 and $651.02 in 2010.

Over the course of their entire stay in Las Vegas, visitors spent an average of $265.11 for food and drink (up significantly from 2009 but down from last year) and $57.77 for local transportation (up significantly from 2009 but down from 2010 and 2011). Visitors spent an average of $149.29 for shopping (up significantly from 2008 – 2011), $42.89 on shows (down from 2008, 2010, and 2011), and $9.63 on sightseeing (up from 2008 – 2010).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2008	2009	2010	2011	2012
Average number of adults in immediate party	2.4	2.4	2.4	2.3	2.4
Proportion of visitors with persons under 21 in their immediate party	6%	8%	7%	10%	11%
Proportion of visitors who stayed overnight	99.6%	99.8%	99.3%	99.8%	99.7%
Days stayed (average)	4.5	4.6	4.6	4.7	4.3
Nights stayed (average)	3.5	3.6	3.6	3.7	3.3
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	94%	96%	95%	95%	96%
Number of room occupants (average — hotel/motel only)	2.1	2.1	2.0	2.1	2.1
Lodging expenditures (average per night — non-package)	$101.68	$75.78	$79.64	$84.04	$93.13
Proportion of visitors who paid a regular room rate	32%	20%	23%	18%	32%
Proportion of visitors who bought a package or travel group trip	15%	15%	16%	18%	14%
Average cost of package per person (among package/tour group visitors)	$746.69	$640.29	$651.02	$757.83	$743.65
Average trip expenditures for food and drink	$273.39	$250.32	$256.82	$274.69	$265.11
Average trip expenditures for local transportation	$59.26	$53.31	$62.87	$64.25	$57.77
Average trip expenditures for shopping	$121.90	$101.97	$122.80	$129.34	$149.29
Average trip expenditures for shows	$51.64	$39.87	$49.28	$47.52	$42.89
Average trip expenditures for sightseeing	$7.12	$5.77	$7.21	$10.24	$9.63

GAMING BEHAVIOR AND BUDGETS — EXECUTIVE SUMMARY

Seventy-two percent (72%) of 2012 visitors said they gambled while in Las Vegas, down significantly from 85% in 2008, 83% in 2009, 80% in 2010, and 77% in 2011. Gamblers spent an average of 2.6 hours per day gambling, down significantly from past years. The average gaming budget in 2012 was $484.70, not significantly different from past years. Twenty-five percent (25%) of visitors said they would be *more* likely to visit Las Vegas even with the wider gambling choices available to them, down significantly from 38% in 2008, 39% in 2009, and 35% in 2010.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2008	2009	2010	2011	2012
Proportion who gambled while visiting Las Vegas	85%	83%	80%	77%	72%
Average number of hours per day spent gambling (among those who gambled)	3.3	3.2	2.9	2.9	2.6
Average trip gambling budget (among those who gambled)	$531.98	$481.57	$466.20	$447.63	$484.70
Proportion who said they would be "more likely" to visit Las Vegas even with more places to gamble outside Las Vegas	38%	39%	35%	27%	25%

ENTERTAINMENT — EXECUTIVE SUMMARY

Sixty-five percent (65%) of visitors attended shows during their current stay, down significantly from 72% in 2008, but up from 60% in 2011. Among those who saw a show in Las Vegas, 78% went to a lounge act, up significantly from prior years. Eleven percent (11%) of these visitors attended comedy shows, down significantly from 14% in 2008, 18% in 2009, and 17% in 2010. Fourteen percent (14%) of visitors who saw shows saw a big-name headliner, down from past years. Thirteen percent (13%) of all visitors said they had been to other paid attractions in Las Vegas, down from prior years.

SUMMARY TABLE OF ENTERTAINMENT ACTIVITIES

	2008	2009	2010	2011	2012
Proportion who attended any shows during their current stay in Las Vegas	72%	64%	68%	60%	65%
Proportion who attended lounge acts (among those who attended shows)	74%	69%	66%	73%	78%
Proportion who attended big-name headliner performances (among those who attended shows)	18%	19%	18%	17%	14%
Proportion who attended comedy shows (among those who attended shows)	14%	18%	17%	11%	11%
Proportion who went to other paid attractions in Las Vegas	21%	16%	20%	18%	13%

ATTITUDINAL INFORMATION — EXECUTIVE SUMMARY

Ninety-four percent (94%) of visitors reported being “very satisfied” with their trip to Las Vegas, up from 92% in 2011.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2008	2009	2010	2011	2012
Proportion who were “very satisfied” with their current trip to Las Vegas	93%	94%	94%	92%	94%

VISITOR DEMOGRAPHICS — EXECUTIVE SUMMARY

Visitors in 2012 were likely to be married (75%, down from 80% in 2008, 78% in 2009, and 79% in 2010), earning $40,000 or more (84%, up significantly from 81% in 2010), and employed (69%, up from past years). One-fifth (19%) were retired (down from 28% each in 2008 and 2009, 27% in 2010, and 25% in 2011). The proportion of visitors who were 40 years old or older was 58% (down from prior years) and the average age was 44.8 (also down significantly from past years). More than one-half (54%) of visitors were from the Western United States, with the bulk of them coming from California (33%, up from past years). Seventeen percent (17%) of visitors were from foreign countries, up from 14% in 2009.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2008	2009	2010	2011	2012
Proportion of visitors who were married	80%	78%	79%	77%	75%
Proportion of visitors with a household income of $40,000 or more	83%	83%	81%	87%	84%
Proportion of visitors who were employed	66%	65%	66%	66%	69%
Proportion of visitors who were retired	28%	28%	27%	25%	19%
Proportion of visitors who were 40 years old or older	76%	72%	71%	70%	58%
Average age	50.6	50.0	49.2	49.0	44.8
Proportion of visitors with a college diploma	45%	47%	48%	50%	52%
Proportion of visitors from the West	52%	55%	54%	55%	54%
Proportion of visitors from California	28%	31%	30%	31%	33%
Proportion of visitors from a foreign country	15%	14%	18%	16%	17%

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 in 2012.

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2008	2009	2010	2011	2012
Days stayed (average)	4.5	4.6	4.6	4.7	4.3
Nights stayed (average)	3.5	3.6	3.6	3.7	3.3
Proportion of visitors who stayed overnight	99.6%	99.8%	99.3%	99.8%	99.7%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	94%	96%	95%	95%	96%
Lodging expenditures (average per night — non-package)	$101.68	$75.78	$79.64	$84.04	$93.13
Proportion of visitors who bought a package or travel group trip	15%	15%	16%	18%	14%
Average cost of package per person (among package/tour group visitors)	$746.69	$640.29	$651.02	$757.83	$743.65
Number of room occupants (average)	2.1	2.1	2.0	2.1	2.1
Average trip expenditures for food and drink	$273.39	$250.32	$256.82	$274.69	$265.11
Average trip expenditures for local transport	$59.26	$53.31	$62.87	$64.25	$57.77
Average trip expenditures for shopping	$121.90	$101.97	$122.80	$129.34	$149.29
Average trip expenditures for shows	$51.64	$39.87	$49.28	$47.52	$42.89
Average trip expenditures for sightseeing	$7.12	$5.77	$7.21	$10.24	$9.63
Proportion who gambled while visiting Las Vegas	85%	83%	80%	77%	72%
Average trip gambling budget (among those who gambled)	$531.98	$481.57	$466.20	$447.63	$484.70

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 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.

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 presents the results of the 2012 study, as well as for the previous four calendar years (2008, 2009, 2010, and 2011). 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 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

Sixteen percent (16%) of 2012 visitors indicated they were first-time visitors to Las Vegas, down significantly from 18% in 2010 (Figure 1). Eighty-four percent (84%) were repeat visitors, up from 82% in 2010.

FIGURE 1
First Visit Vs. Repeat Visit

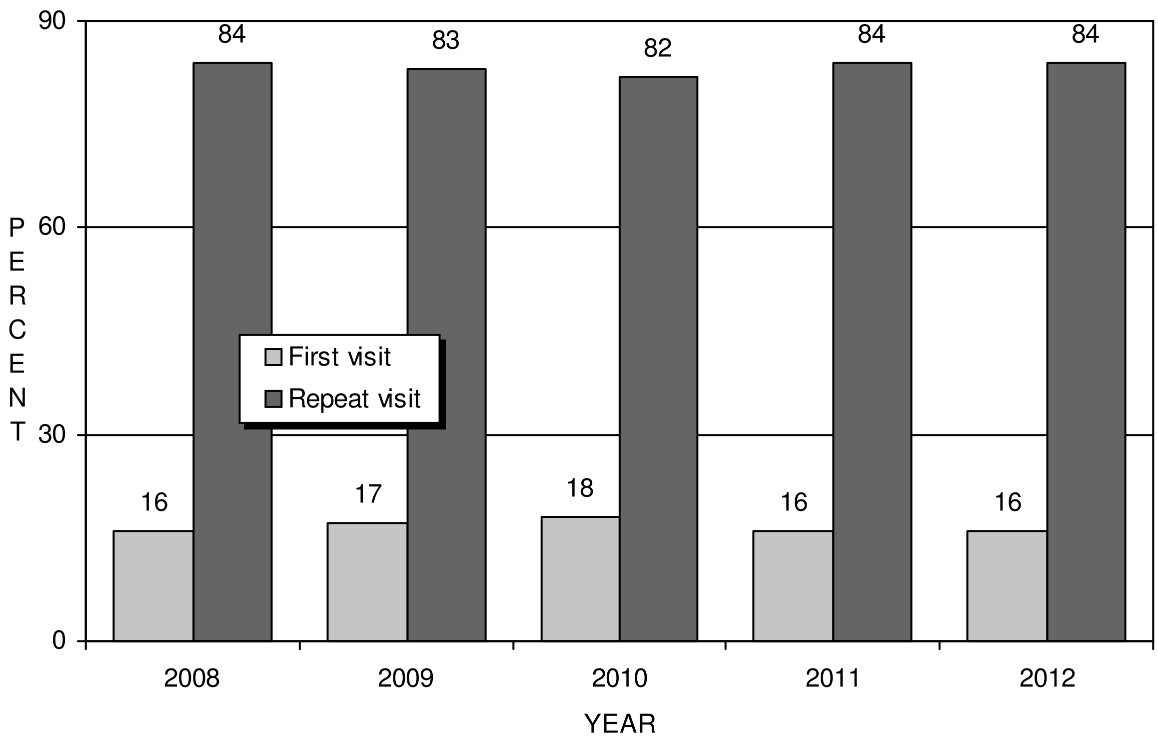
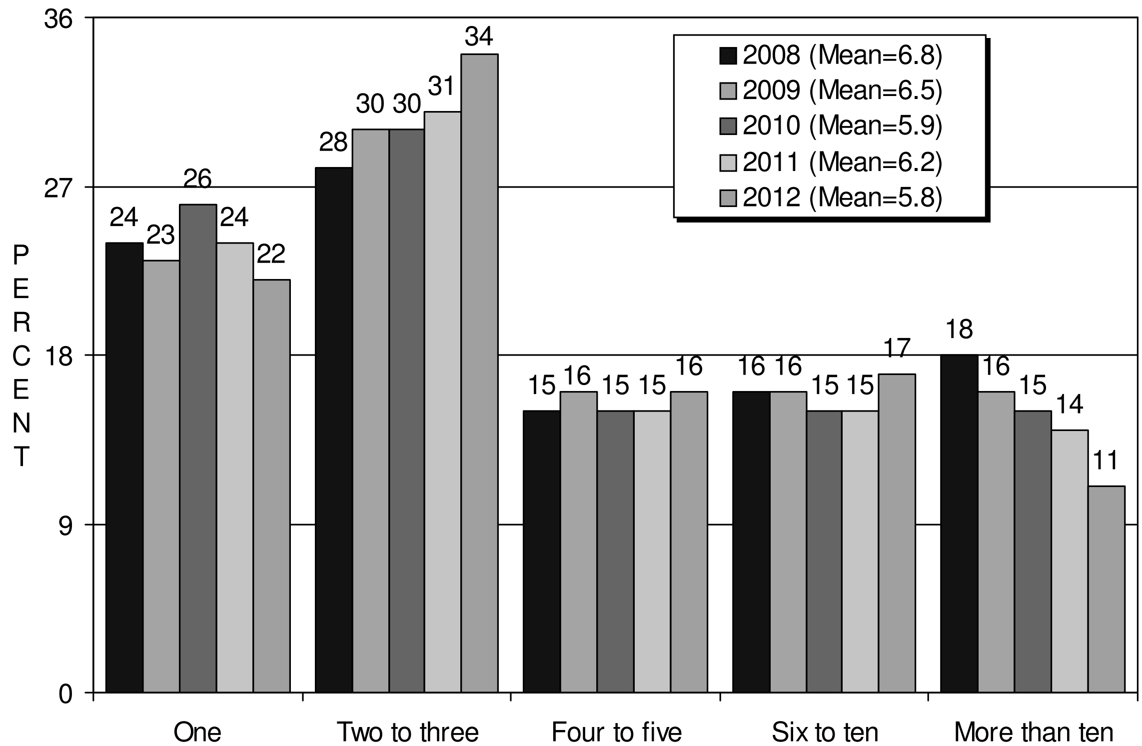
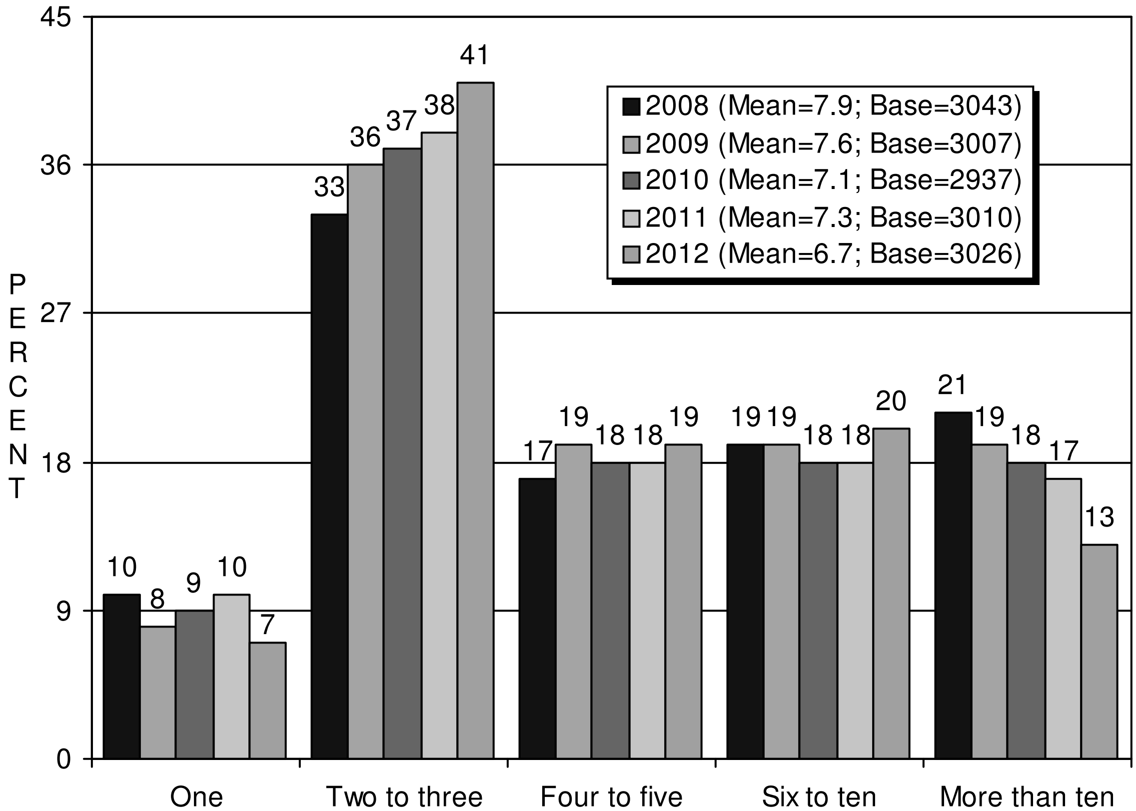


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



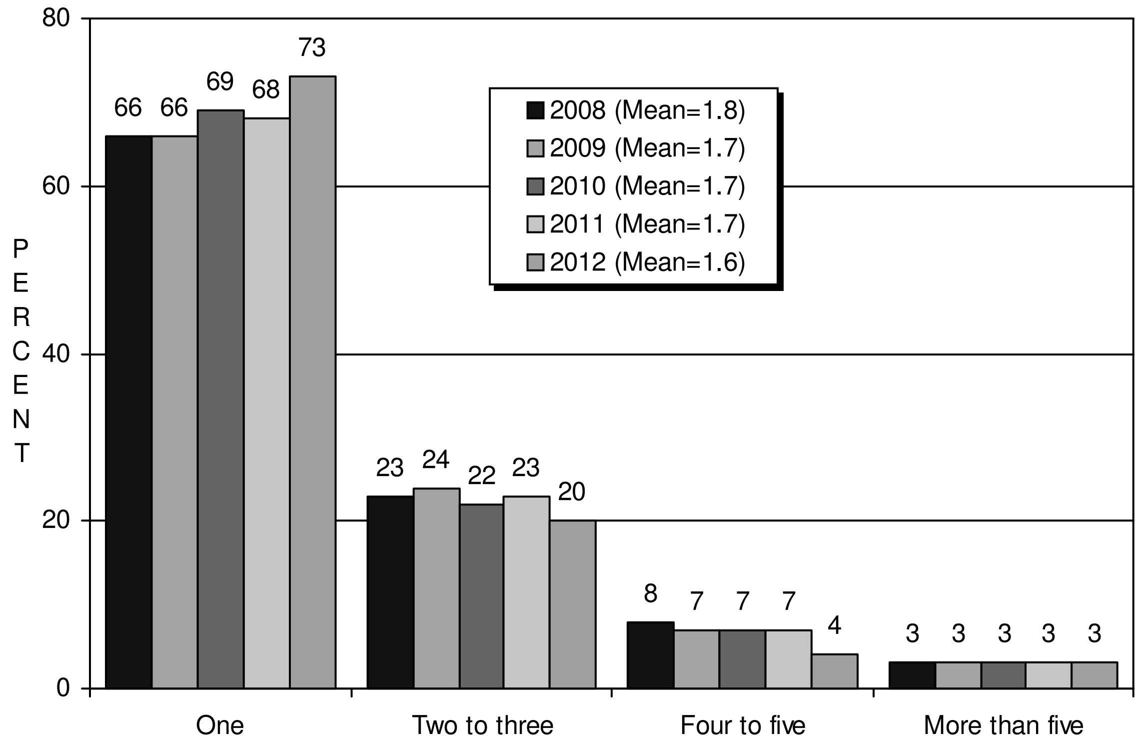
Among all visitors, the average number of visits to Las Vegas over the past five years was 5.8, down significantly from 6.8 in 2008, 6.5 in 2009, and 6.2 in 2011 (Figure 2). Twenty-two percent (22%) of visitors said they visited Las Vegas only once in the past five years (down from 24% each in 2008 and 2011, and 26% in 2010), while 34% visited two to three times (up from 28% in 2008, 30% each in 2009 and 2010, and 31% last year). Seventeen percent (17%) visited six to 10 times in the past five years (up from 15% each in 2010 and 2011), while 11% said they visited more than 10 times (down from 18% in 2008, 16% in 2009, 15% in 2010, and 14% in 2011).

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



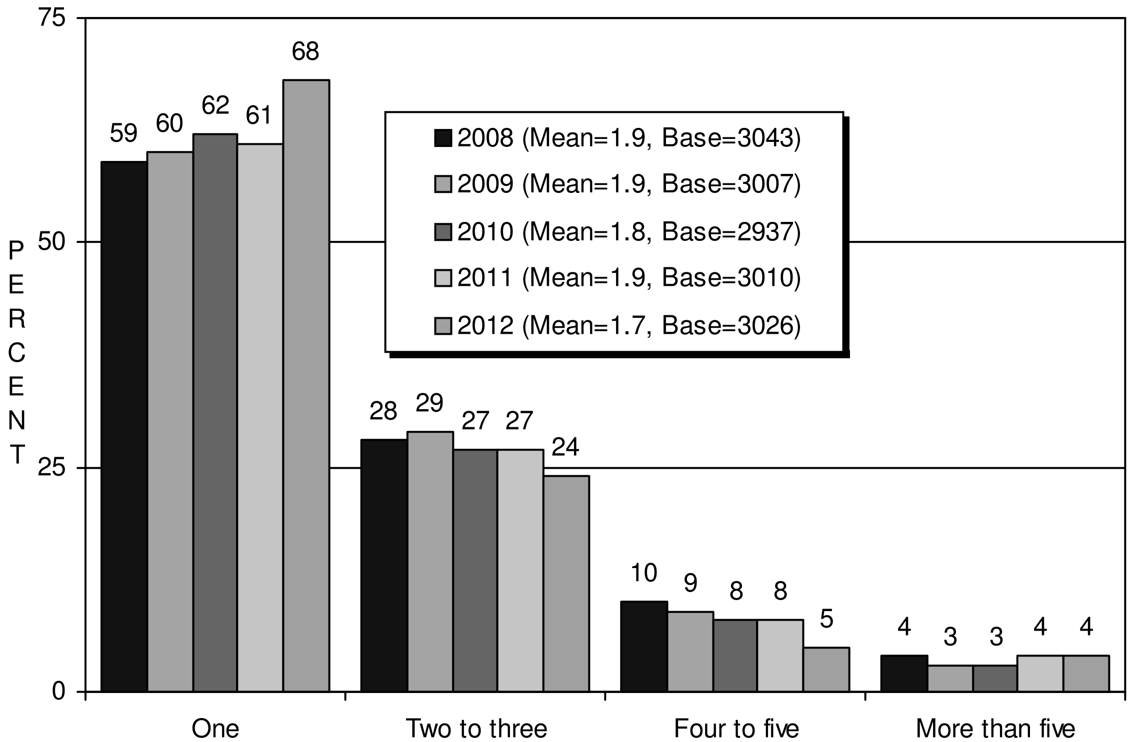
In 2012, *repeat visitors* reported making an average of 6.7 visits to Las Vegas in the past five years, down significantly from 7.9 in 2008, 7.6 in 2009, and 7.3 in 2011 (Figure 3). Seven percent (7%) of repeat visitors said they visited Las Vegas only once in the past five years (down from 10% each in 2008 and 2011, and 9% in 2010), while 41% visited two to three times (up from 33% in 2008, 36% in 2009, 37% in 2010, and 38% last year). Twenty percent (20%) visited six to 10 times in the past five years (up from 18% each in 2010 and 2011), while 13% said they visited more than 10 times (down from 21% in 2008, 19% in 2009, 18% in 2010, and 17% last year).

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



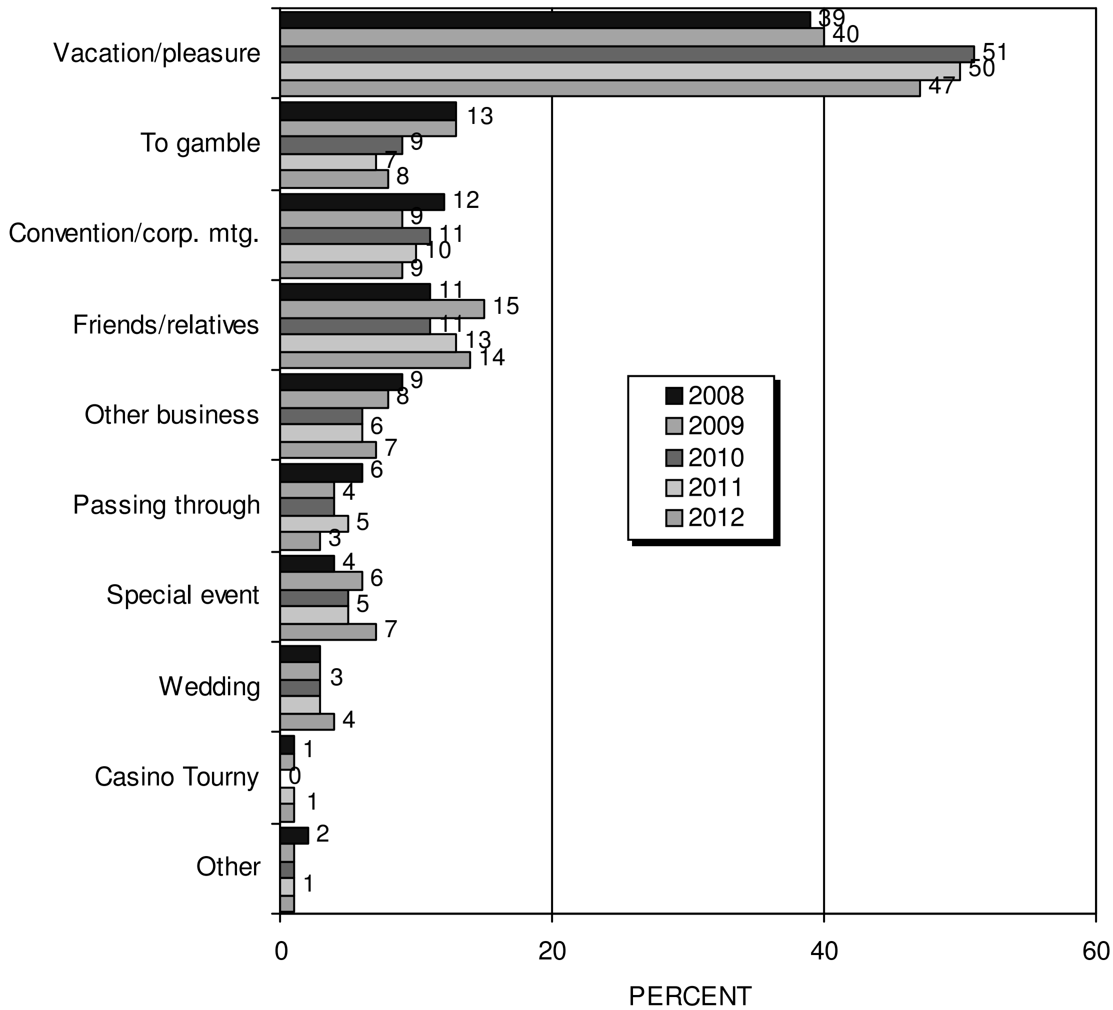
Among all visitors, the average number of visits to Las Vegas in the past 12 months was 1.6, down from past readings (Figure 4). More than seven in ten (73%) visitors reported visiting just once in the past year (up significantly from 66% each in 2008 and 2009, 69% in 2010, and 68% in 2011), while two in ten (20%) visited two to three times (down from 23% each in 2008 and 2011, 24% in 2009, and 22% in 2010), 4% visited four to five times (down from 8% in 2008 and 7% each in 2009 – 2011), and 3% visited more than five times.

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



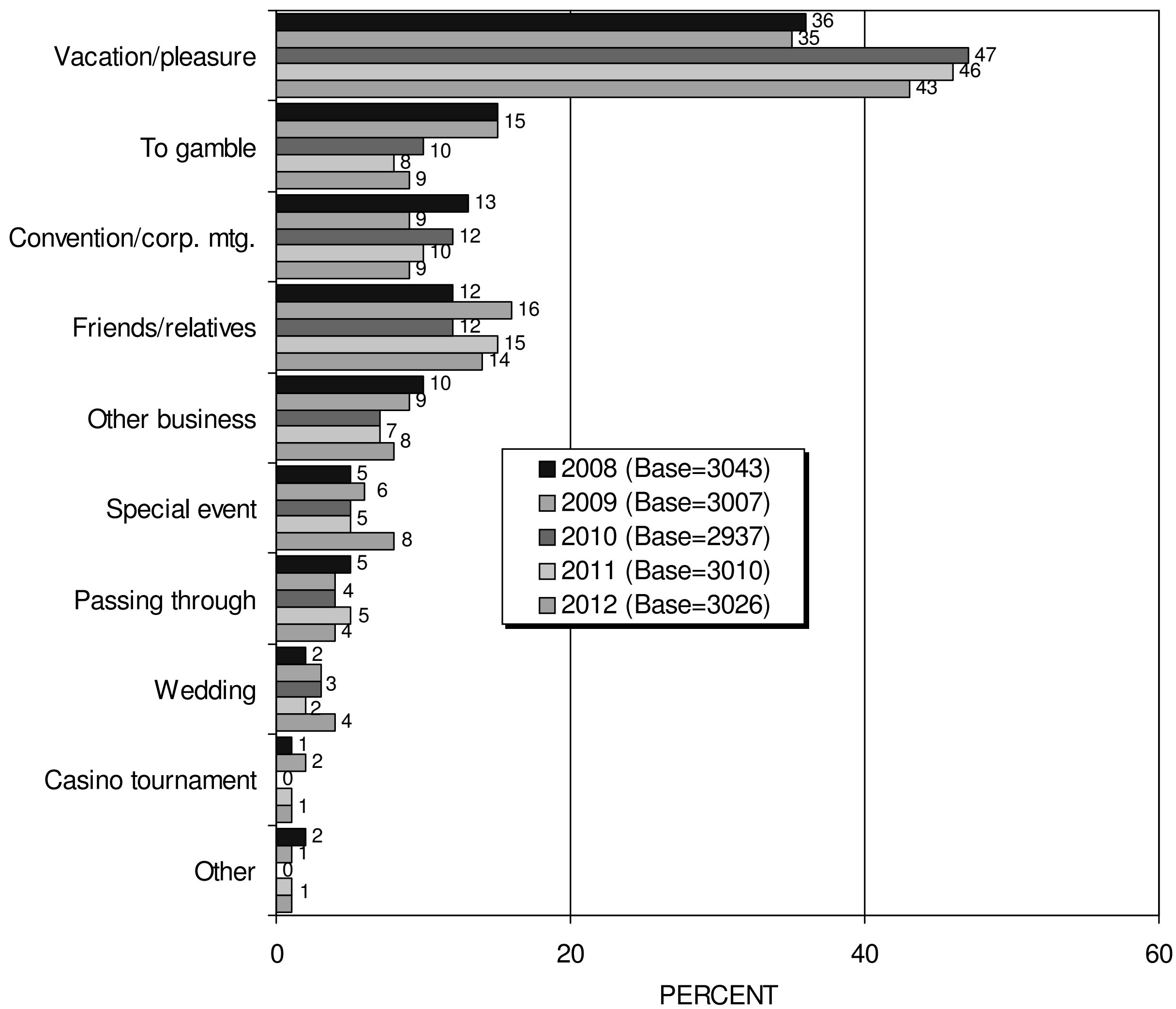
Among *repeat* visitors, the average number of visits to Las Vegas during the past year was 1.7, down significantly from past readings (Figure 5). Sixty-eight percent (68%) of repeat visitors reported visiting just once in the past year (up significantly from 59% in 2008, 60% in 2009, 62% in 2010, and 61% in 2011), while 24% visited two to three times (down from 28% in 2008, 29% in 2009, and 27% each in 2010 and 2011), 5% visited four to five times (down from 10% in 2008, 9% in 2009, and 8% each in 2010 and 2011), and 4% visited more than five times

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



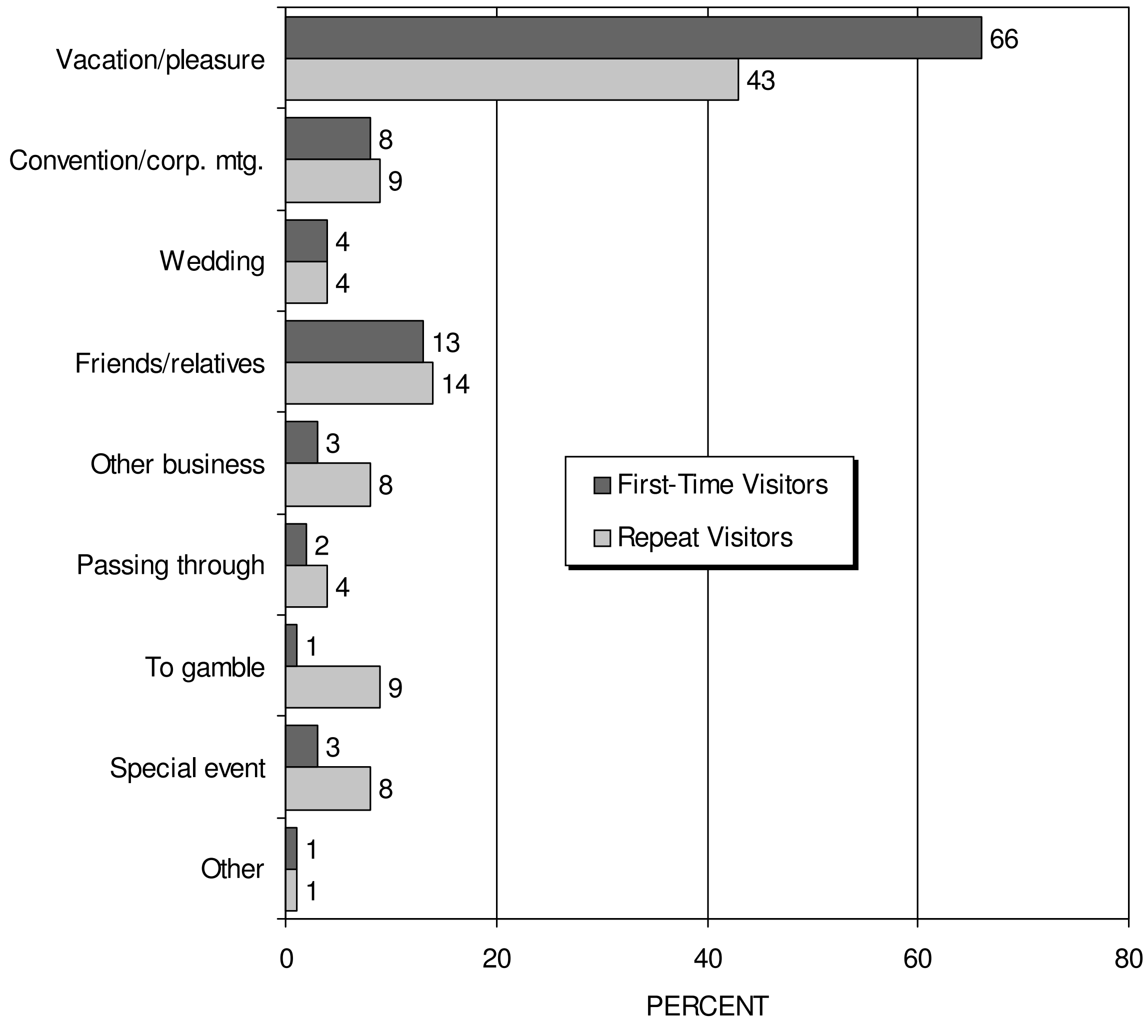
When asked about the primary purpose of their current visit to Las Vegas, 47% of all visitors mentioned vacation or pleasure, up significantly from 39% in 2008 and 40% in 2009, but down from 51% in 2010 and 50% in 2011 (Figure 6). Eight percent (8%) said they were in Las Vegas primarily to gamble, down from 13% each in 2008 and 2009. Nine percent (9%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 12% in 2008 and 11% in 2010), while 7% were in town on other business (down from 9% in 2008). Fourteen percent (14%) were visiting friends or relatives, up from 11% each in 2008 and 2010. Seven percent (7%) said they were in town for a special event, while 4% said they came for a wedding (both up from past years). Three percent (3%) were just passing through (down from 6% in 2008 and 5% in 2011), and 1% came for a casino tournament.

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



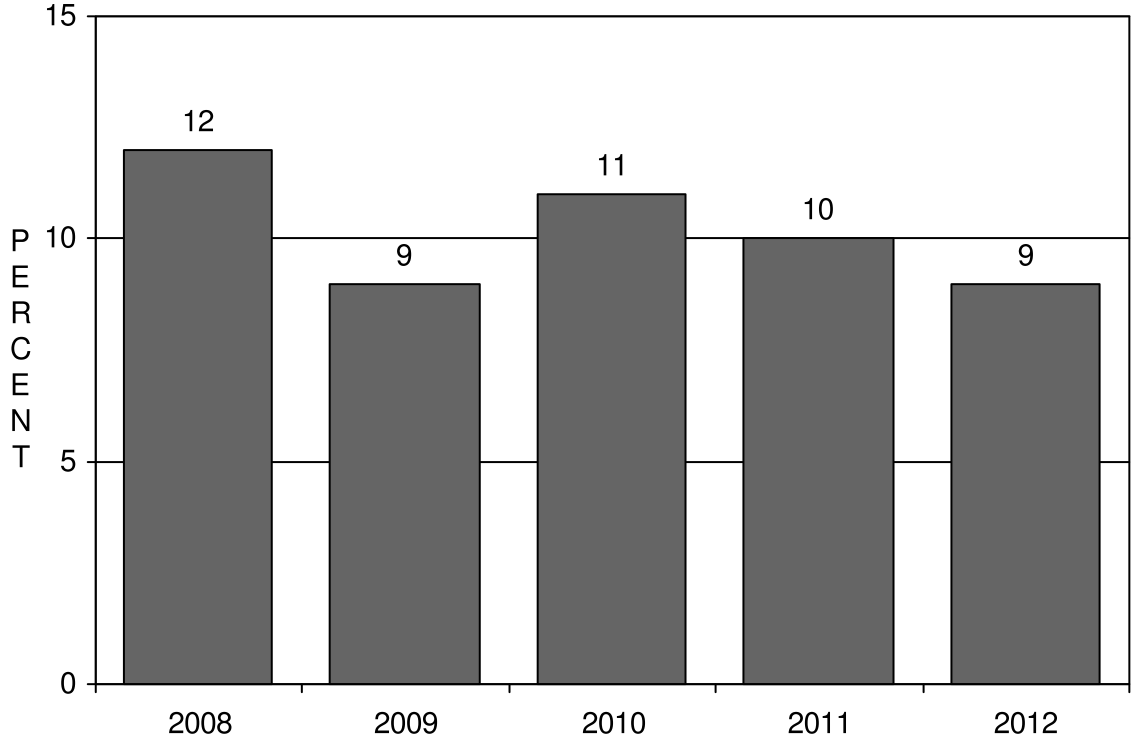
The proportion of *repeat visitors* who said the primary purpose of their current visit to Las Vegas was vacation or pleasure was 43%, up significantly from 36% in 2008 and 35% in 2009 but down from 47% in 2010 and 46% in 2011 (Figure 7). Nine percent (9%) said they were in Las Vegas primarily to gamble, down from 15% each in 2008 and 2009. Nine percent (9%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 13% in 2008 and 12% in 2010), while 8% were in town on other business (down from 10% in 2008). Fourteen percent (14%) were visiting friends or relatives, up from 12% in 2010. Eight percent (8%) said they were in town for a special event, while 4% came for a wedding (both up from past years). Four percent (4%) were just passing through, and 1% came for a casino tournament.

FIGURE 8
Primary Purpose Of Current Visit
(First-Time Versus Repeat Visitors — 2012)



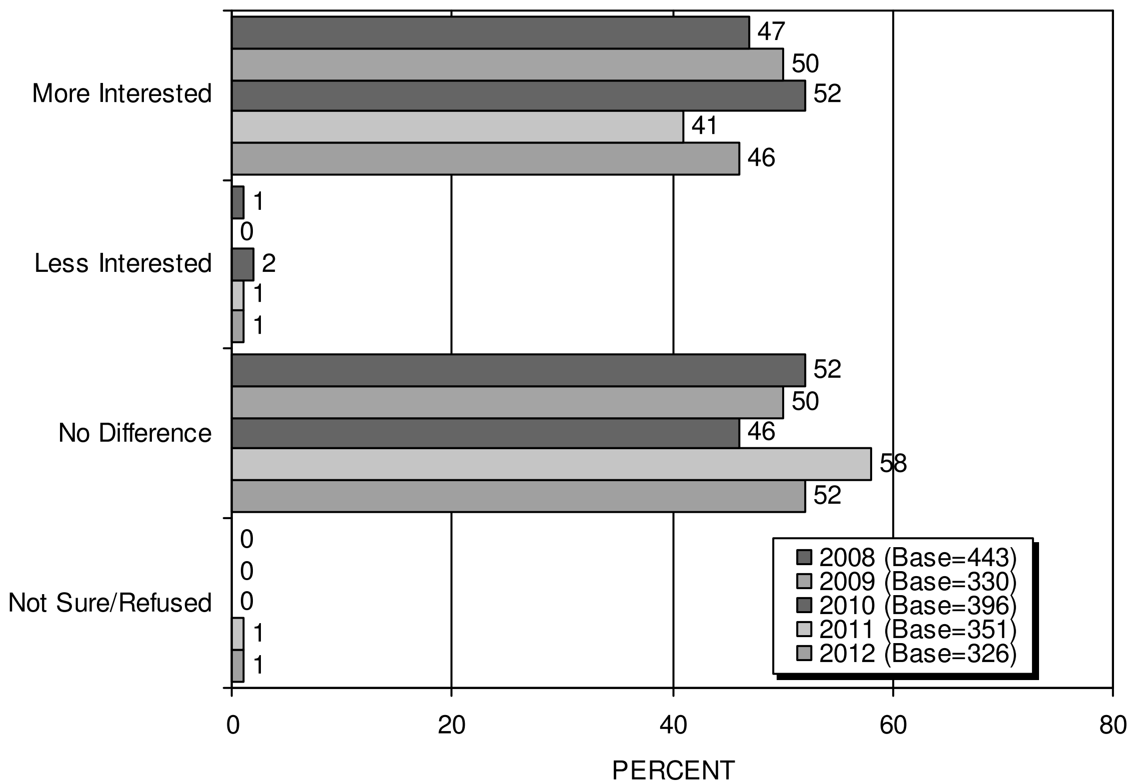
The primary purpose for the current visit among both first-time and repeat visitors is presented in Figure 8. First-time visitors were significantly more likely than repeat visitors to say they were visiting Las Vegas primarily for vacation or pleasure (66% vs. 43%). Repeat visitors were more likely than first-time visitors to say that their current trip to Las Vegas was to gamble (9% vs. 1%), to attend a special event (8% vs. 3%), or for business purposes other than a convention or corporate meeting (8% vs. 3%).

FIGURE 9
Conventions/Trade Shows/Corporate Meetings



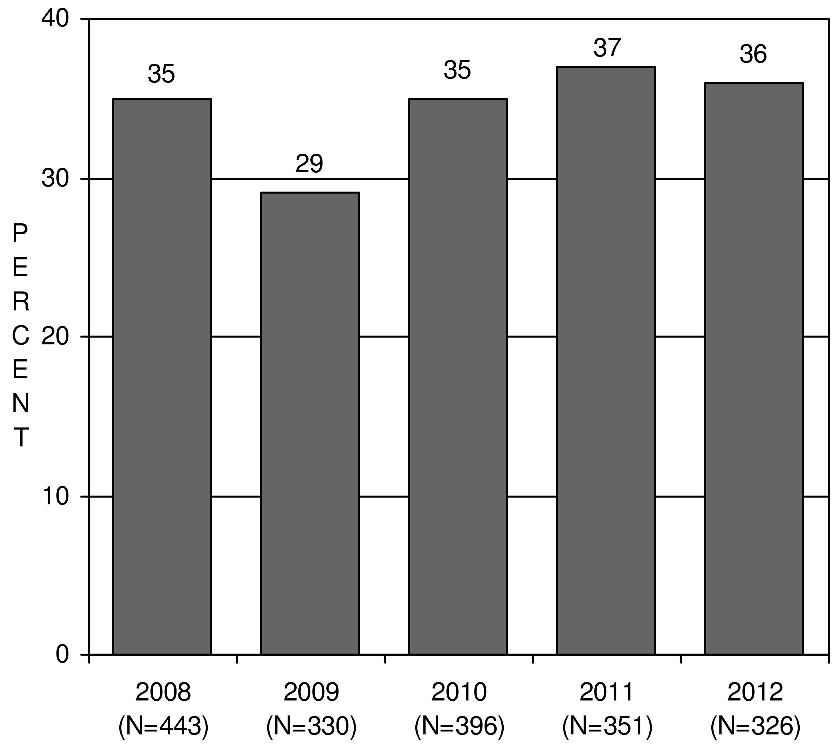
Visitors were asked if they had attended a convention, trade show, or corporate meeting while in Las Vegas (Figure 9). Nine percent (9%) said they had, down from 12% in 2008 and 11% in 2010.

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)



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). In 2012, 46% said having the convention in Las Vegas made them more interested in attending, while 52% said it made no difference. One percent (1%) said it made them less interested.

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)



Convention visitors were asked if they had brought a spouse, family member, or friend who was not attending or working at the convention, trade show, or corporate meeting with them. Thirty-six percent (36%) of convention visitors in 2012 said they had, similar to past years (Figure 11).

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

TRAVEL PLANNING

Travel planning varied broadly — from same-day planning to planning more than 90 days in advance. Forty-six percent (46%) of visitors in 2012 planned their trip to Las Vegas more than one month in advance (Figure 12), down significantly from 63% in 2008, 55% in 2009, 52% in 2010, and 50% last year. Forty-eight percent (48%) planned their trip from one week to one month in advance, up from 33% 2008, 41% in 2009, 42% in 2010, and 45% in 2011. The remaining 7% planned their trip less than a week in advance, up from 4% each in 2008 and 2009.

FIGURE 12
Advance Travel Planning

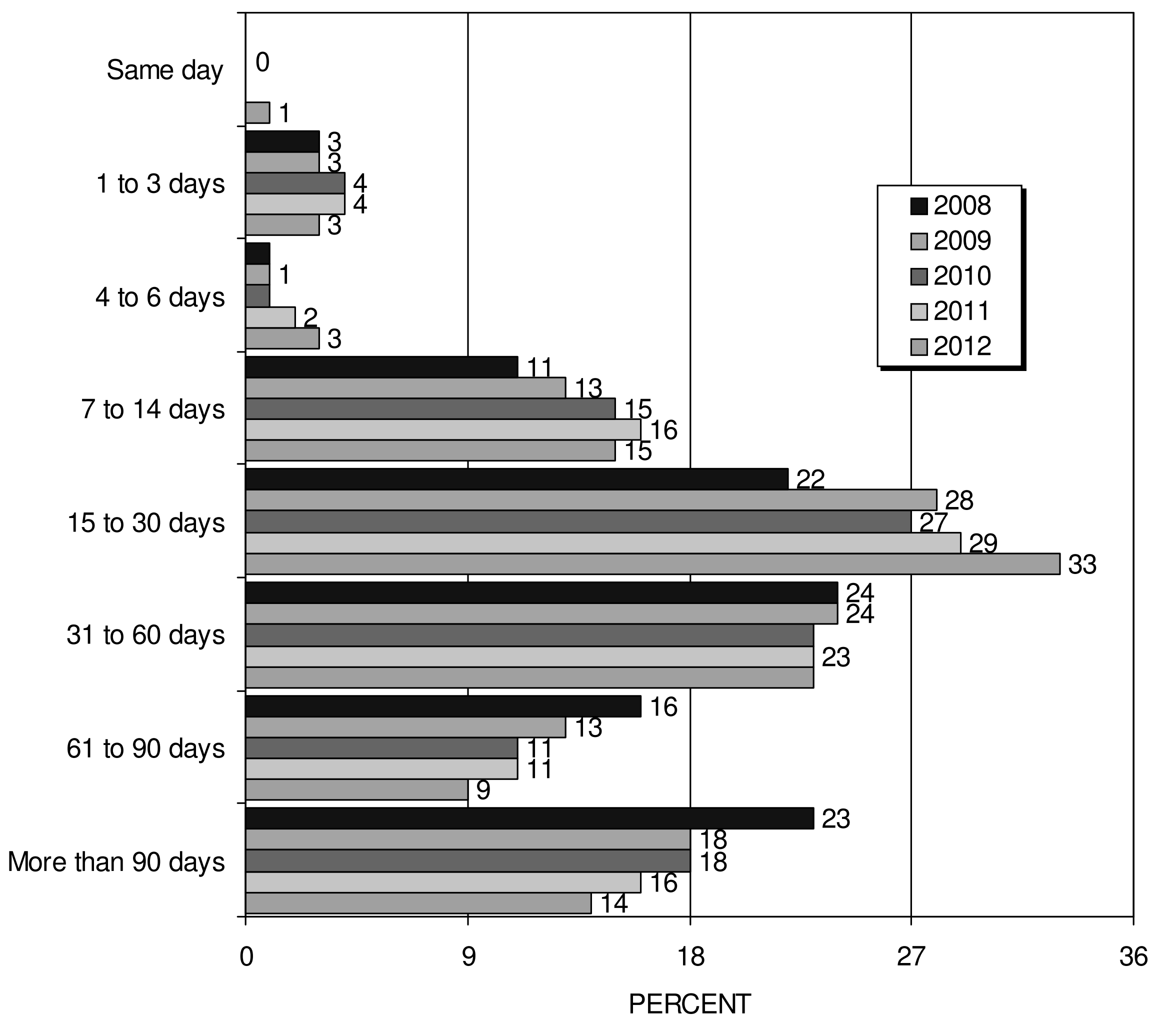
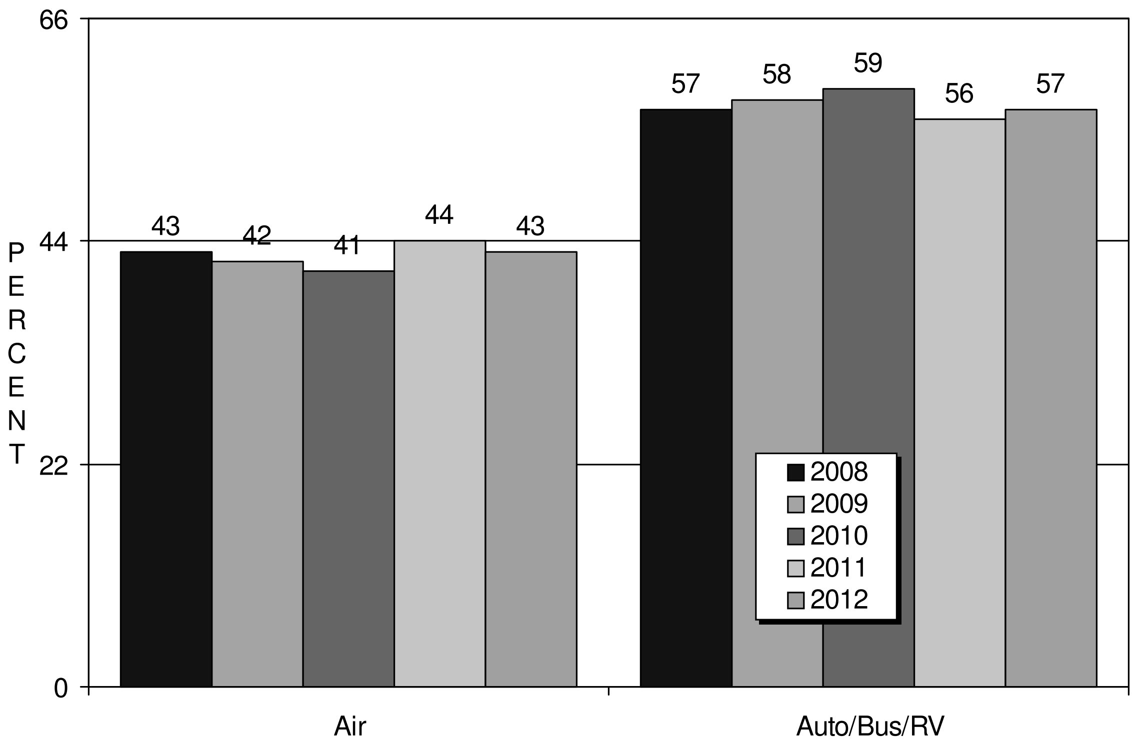
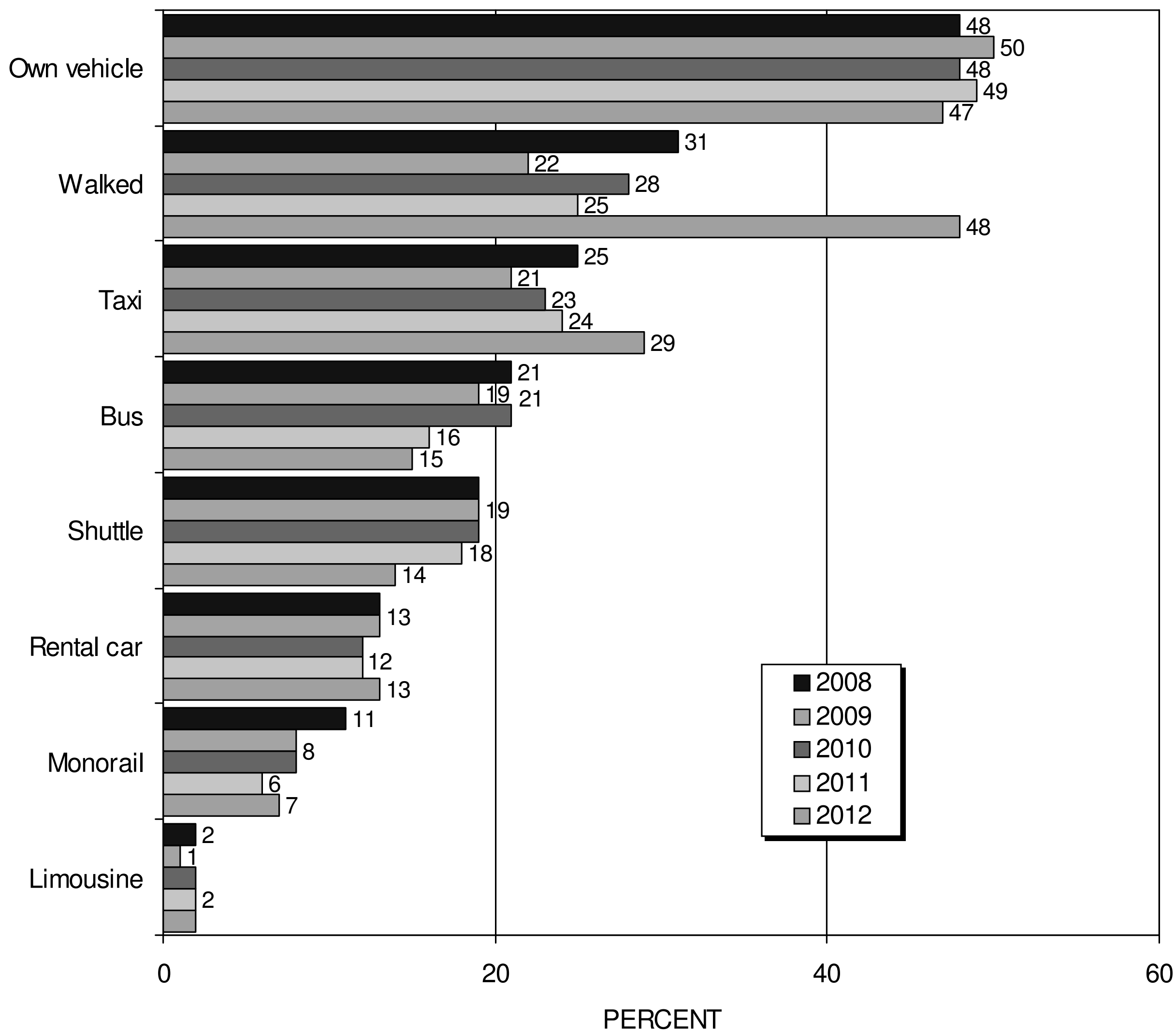


FIGURE 13
Transportation To Las Vegas



Forty-three percent (43%) of visitors to Las Vegas in 2012 arrived by air, not significantly different from past years, while 57% arrived by ground transportation, also similar to past results (Figure 13).

FIGURE 14
Local Transportation*



Forty-seven percent (47%) of visitors said that they used their own vehicle when traveling around Las Vegas, down from 50% in 2009 (Figure 14). Forty-eight percent (48%) volunteered that they walked while in Las Vegas, up from prior years. Twenty-nine percent (29%) reported taking a taxi (up from past years), while 15% reported taking a bus (down from 21% each in 2008 and 2010, and 19% in 2009), 14% reported using a hotel shuttle (down from prior years), and 13% used a rental car. Monorail use (7%) was down significantly from 11% in 2008.

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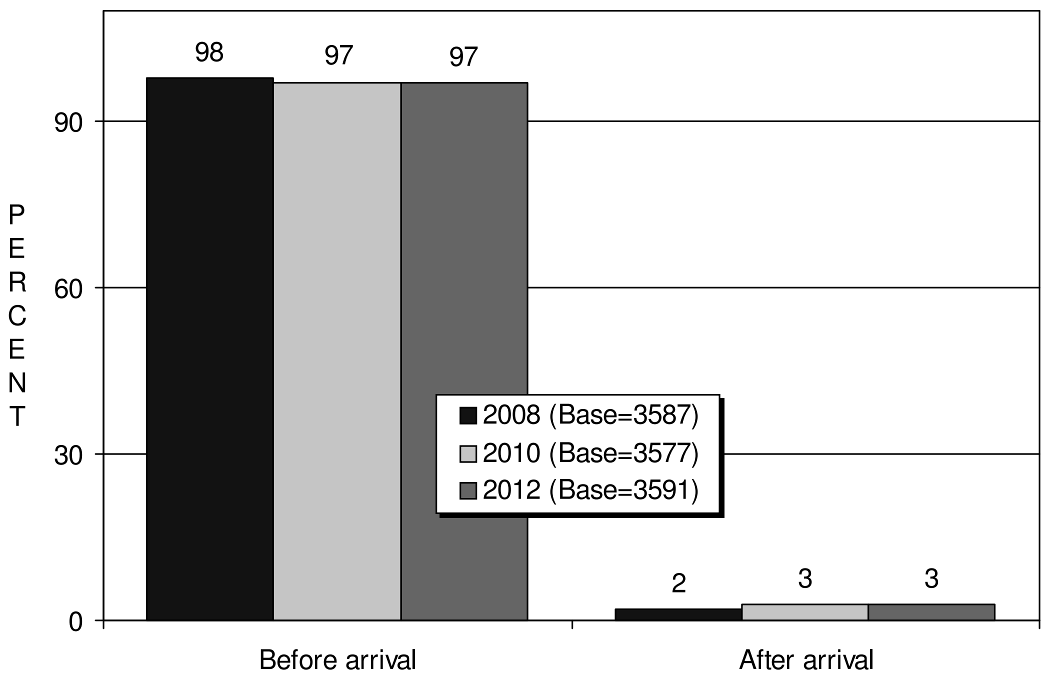
* Multiple responses to this question were permitted.

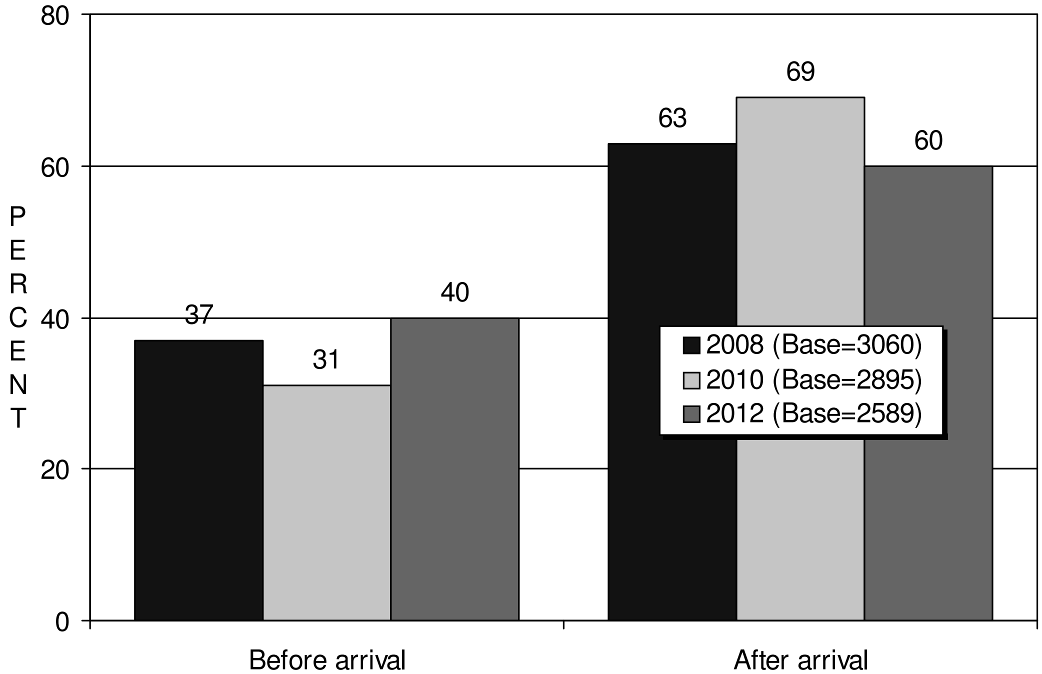
FIGURE 15
When Decided Where To Stay*
(Among Those Who Stayed Overnight – Asked Every Other Year)



Most visitors decided where to stay before leaving home (97%, the same as 2010 and similar to 2008 results) (Figure 15).

* This question is asked every other year and was not asked in 2009 or 2011.

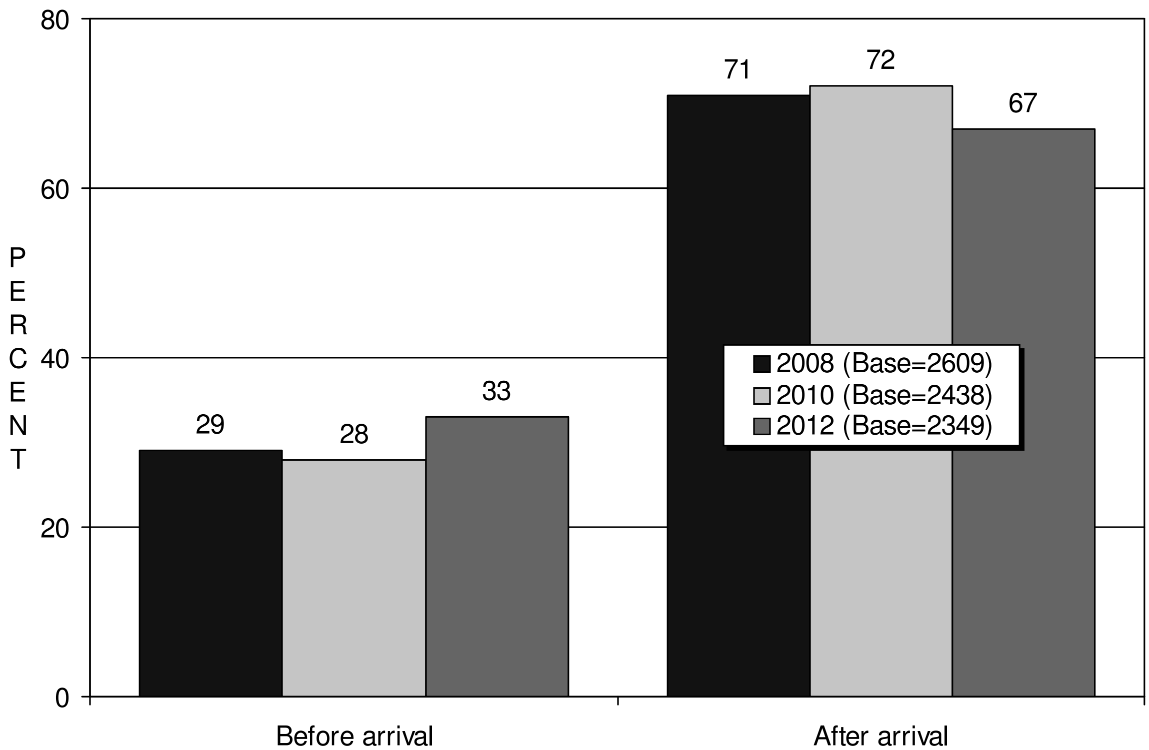
FIGURE 16
When Decided Where To Gamble*
(Among Those Who Gambled – Asked Every Other Year)



Six in ten (60%) visitors decided where to gamble after arriving in Las Vegas, down significantly from 69% in 2010 (Figure 16). Four in ten (40%) visitors decided where to gamble before leaving home, up from 31% in 2010.

* This question is asked every other year and was not asked in 2009 or 2011.

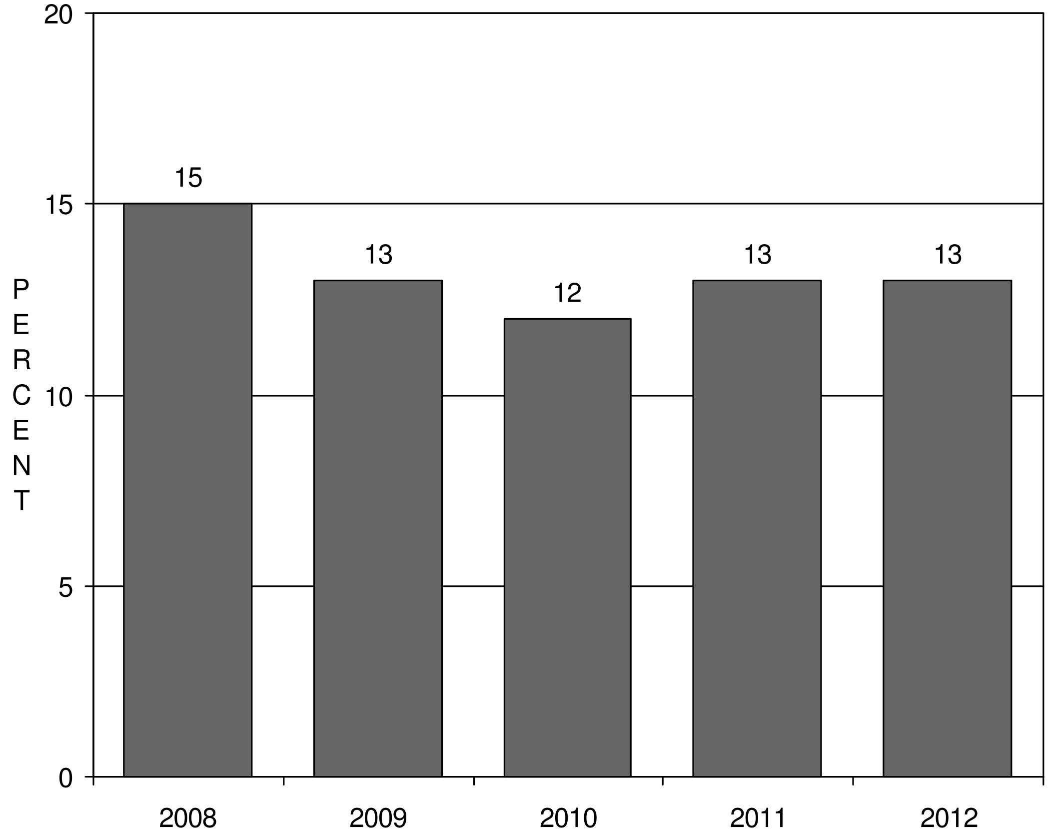
FIGURE 17
When Decided Which Shows To See*
(Among Those Who Saw Shows – Asked Every Other Year)



Two-thirds (67%) of visitors in 2012 decided which shows to see after arrival, down from 71% in 2008 and 72% in 2010, while one-third (33%) decided before leaving home, up from 29% in 2008 and 28% in 2010 (Figure 17).

* This question is asked every other year and was not asked in 2009 or 2011.

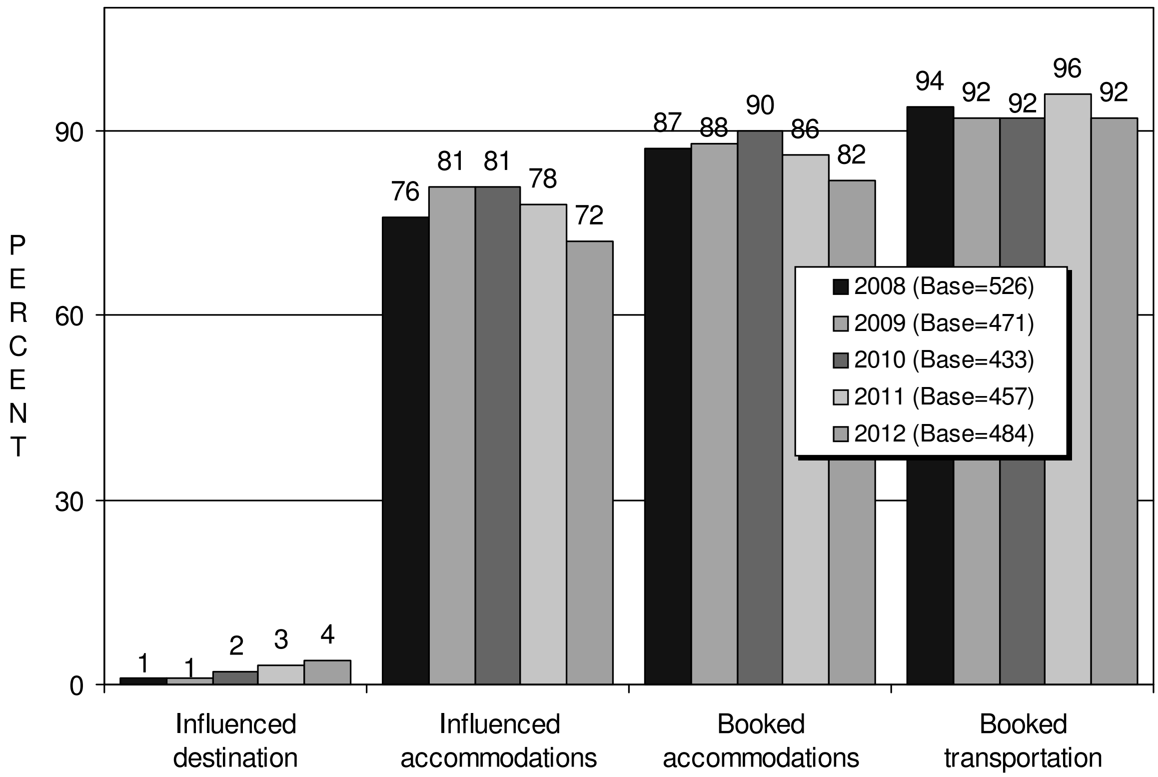
FIGURE 18
Travel Agent Assistance*



Thirteen percent (13%) of visitors reported using a travel agent to plan their trip to Las Vegas, not significantly different from past years (Figure 18).

* 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 (Figure 19), 82% said the travel agent booked their accommodations (down significantly from 87% in 2008, 88% in 2009, and 90% in 2010), while 92% said the travel agent booked their transportation (down significantly from 96% last year).

Seventy-two percent (72%) of visitors said their travel agent influenced their choice of accommodations in Las Vegas (down from past years), while 4% said the travel agent influenced their choice of destination (up from 1% each in 2008 and 2009).

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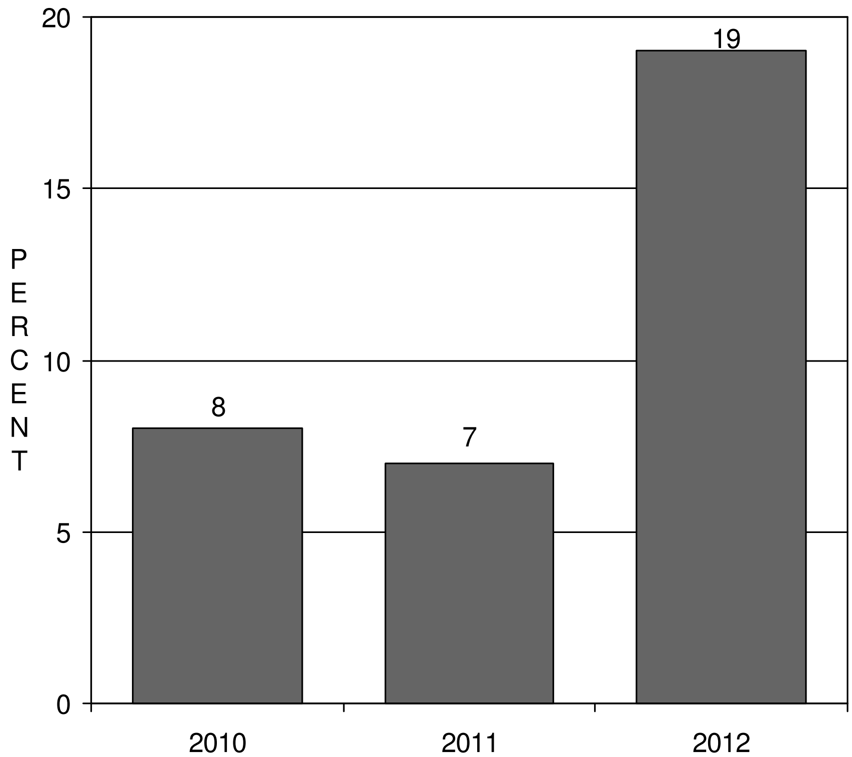
* Only "yes" responses are reported in this chart.

FIGURE 20
Whether Used Social Media Web Sites To Plan Trip*



Beginning in 2010, 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. In 2012, 19% of visitors said they had, up significantly from 8% in 2010 and 7% last year (Figure 20).

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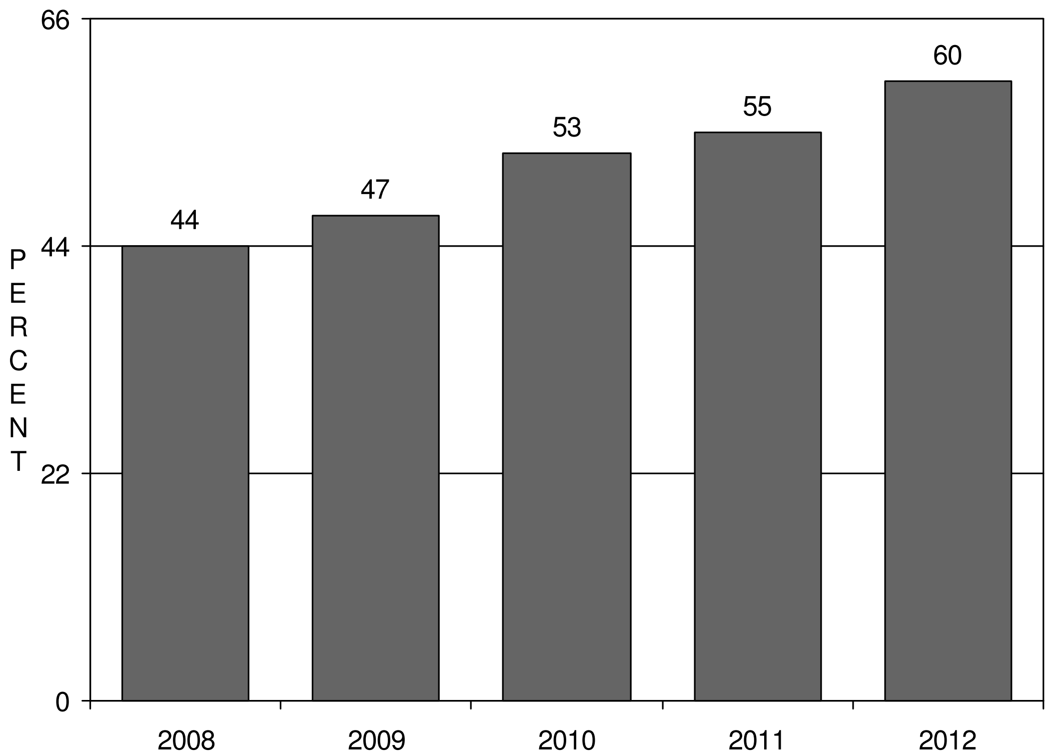
* Only "yes" responses are reported in this chart.

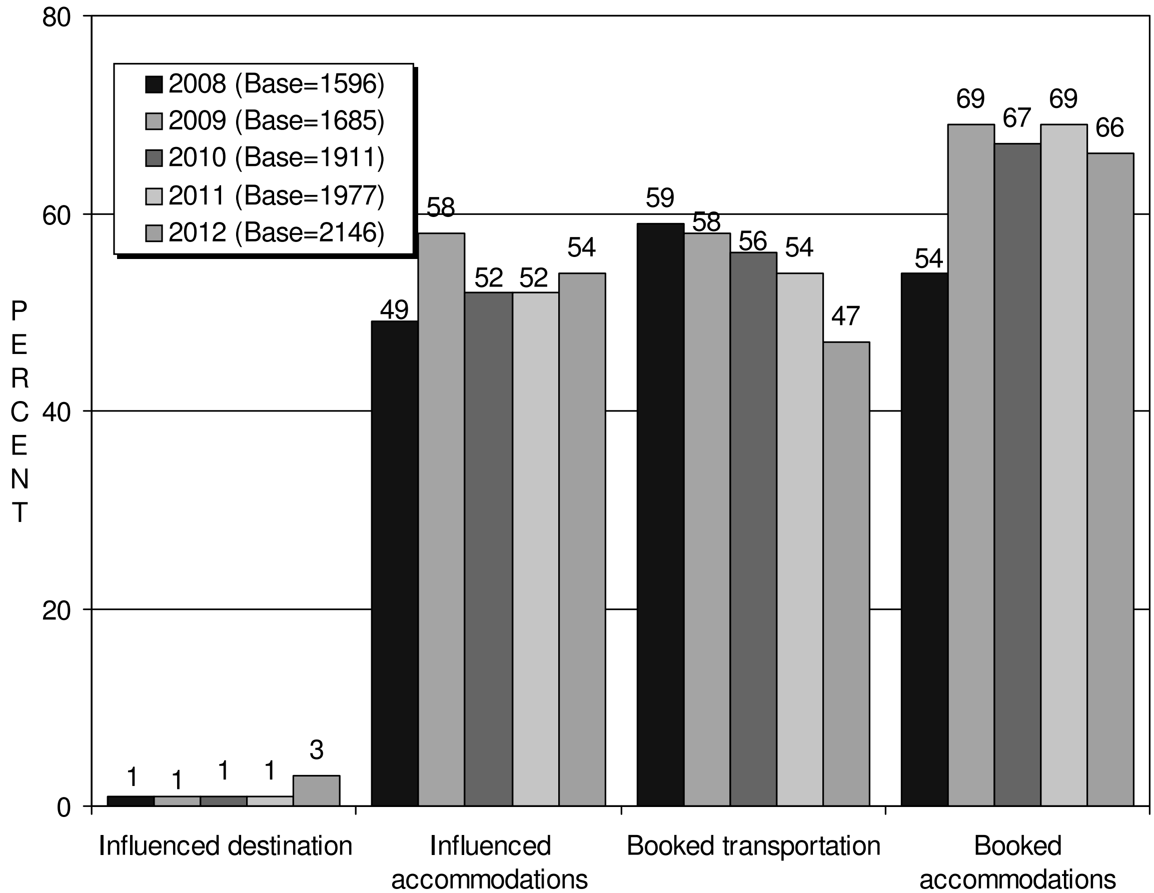
FIGURE 21
Whether Used The Internet To Plan Trip*



Visitors were asked if they used the Internet to plan their trip, and six in ten (60%) said yes, up significantly from 44% in 2008, 47% in 2009, 53% in 2010, and 55% in 2011 (Figure 21).

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

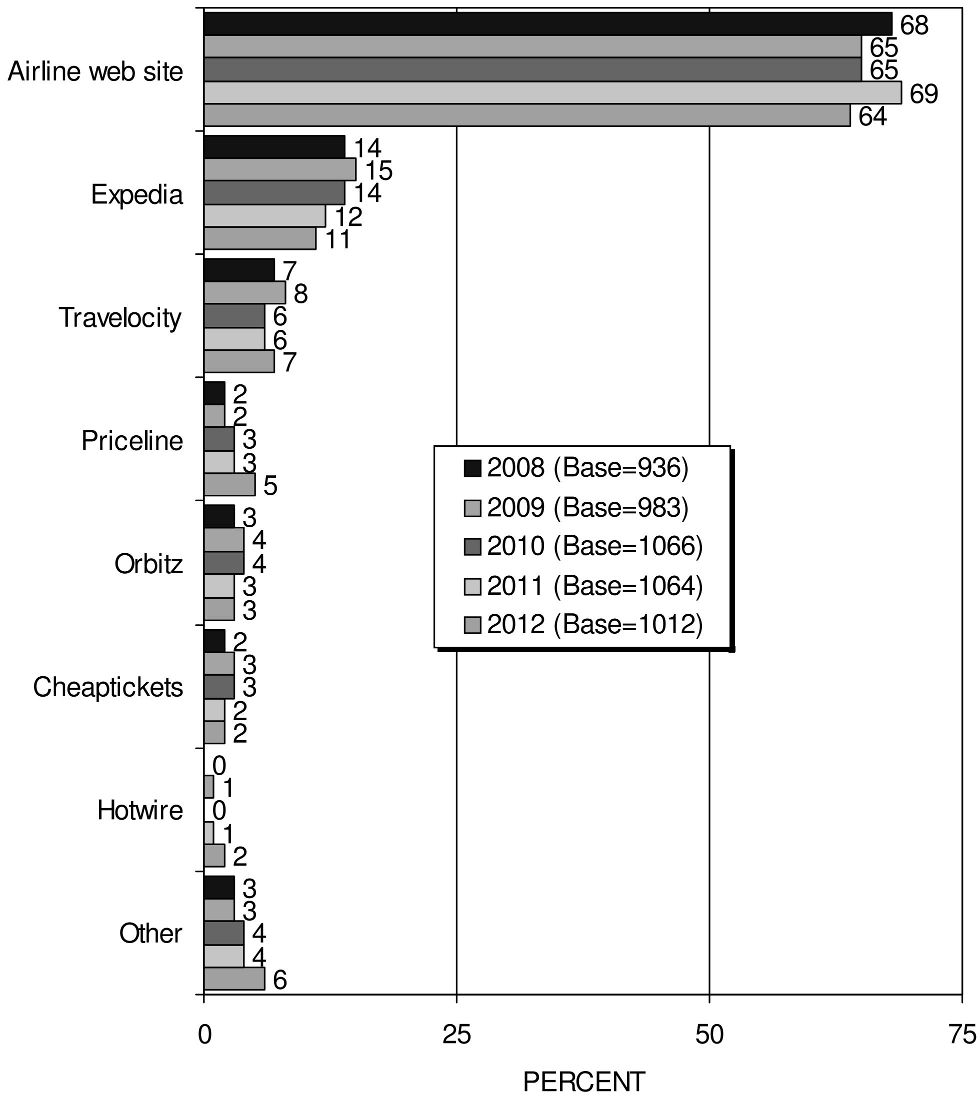
FIGURE 22
Internet Influence And Use*
(Among Those Who Used The Internet To Plan Trip)



Among visitors who used the Internet to plan their trip to Las Vegas, 47% said they booked their transportation online, down significantly from past years (Figure 22). Two-thirds (66%) said they booked their accommodations online, up significantly from 54% in 2008, but down from 69% each in 2009 and 2011. Over one-half (54%) said the Internet influenced their choice of accommodations, up significantly from 49% in 2008, but down from 58% in 2009. Three percent (3%) said the Internet influenced their decision to visit Las Vegas, up from 1% each from 2008 – 2011.

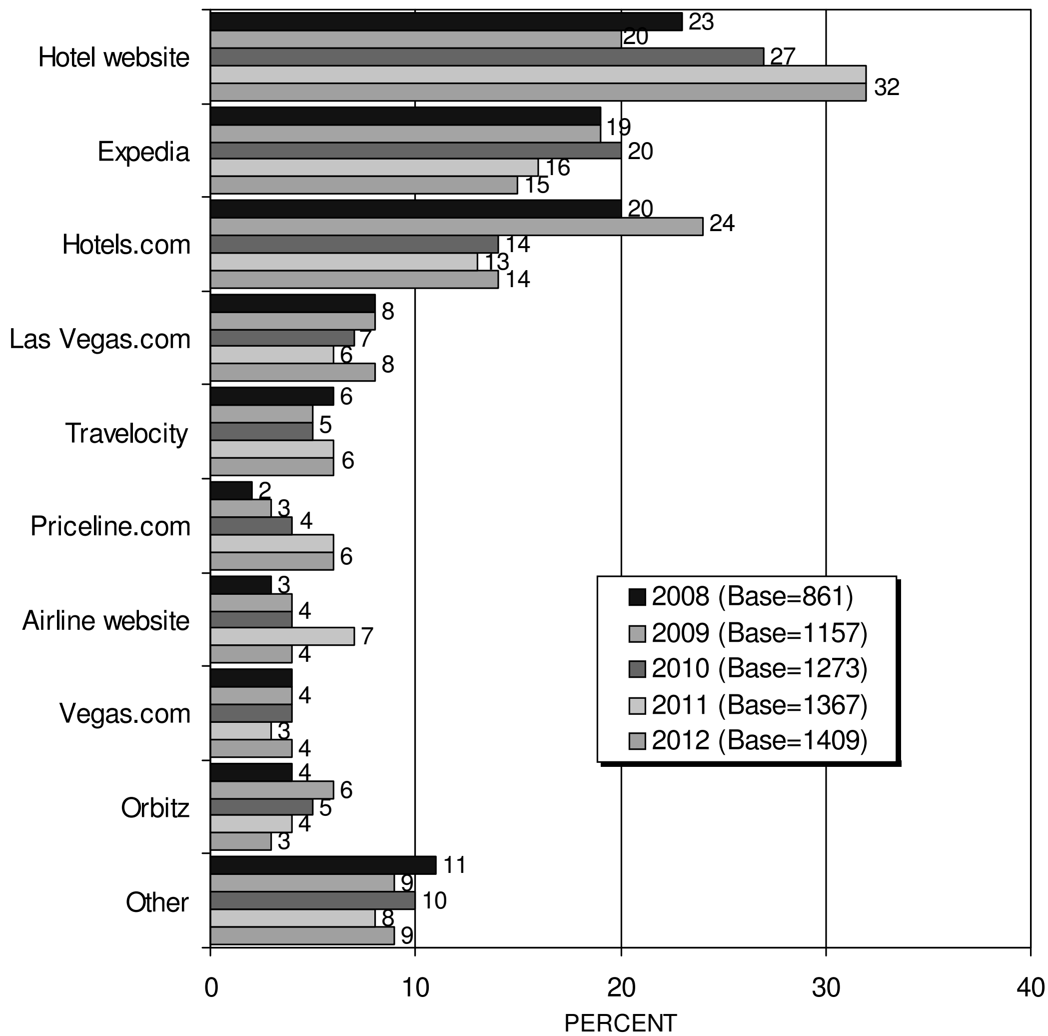
* Only "yes" responses are reported in this chart.

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



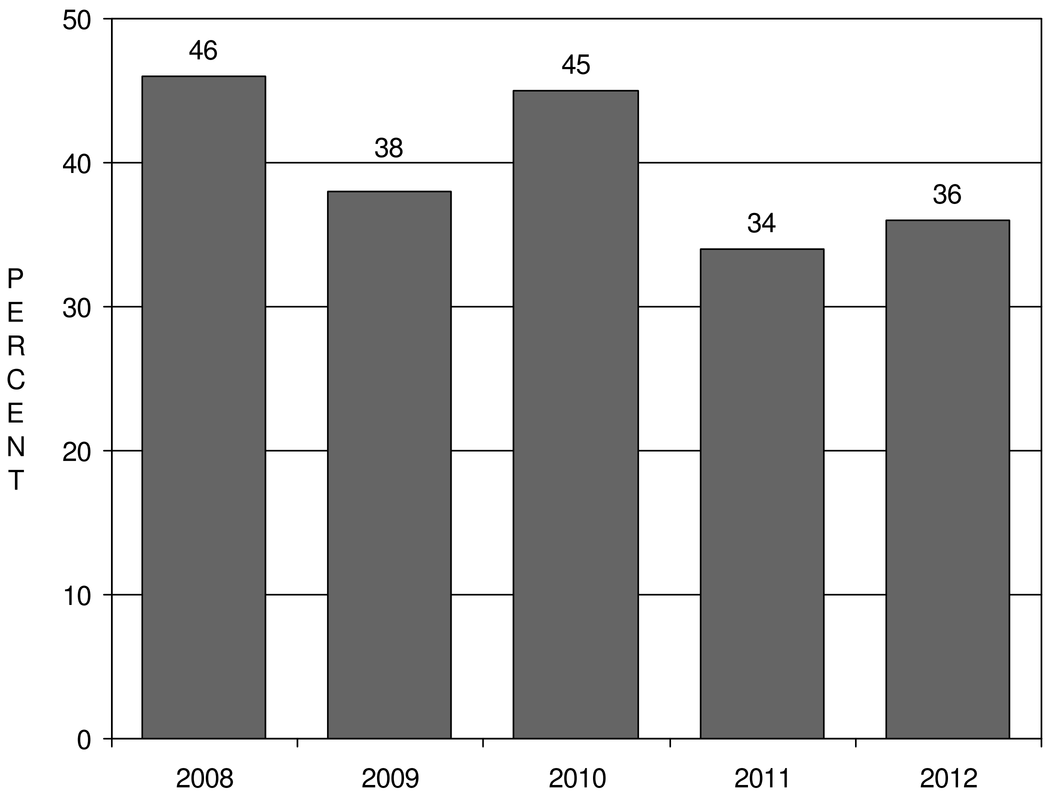
Among those who booked their transportation to Las Vegas online, nearly two-thirds (64%) said they used an airline website, down from 68% in 2008 and 69% last year (Figure 23). Eleven percent (11%) said they used Expedia, down significantly from 14% each in 2008 and 2010, and 15% in 2009. Seven percent (7%) used Travelocity, 5% said Priceline (up from past years), 3% said Orbitz, 2% said Cheaptickets, and another 2% said Hotwire (up from past years).

FIGURE 24
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, nearly one-third (32%) said they used a hotel website, up from 23% in 2008, 20% in 2009, and 27% in 2010 (Figure 24). Fifteen percent (15%) used Expedia (down from 19% each in 2008 and 2009, and 20% in 2010), while 14% said they used Hotels.com (down from 20% in 2008 and 24% in 2009). Eight percent (8%) used LasVegas.com, 6% each used Travelocity or Priceline (up from 2008 – 2010 results), 4% each used an airline website (down from 7% last year), Vegas.com, or Hotwire (up from prior years), while the remaining visitors used a variety of other websites.

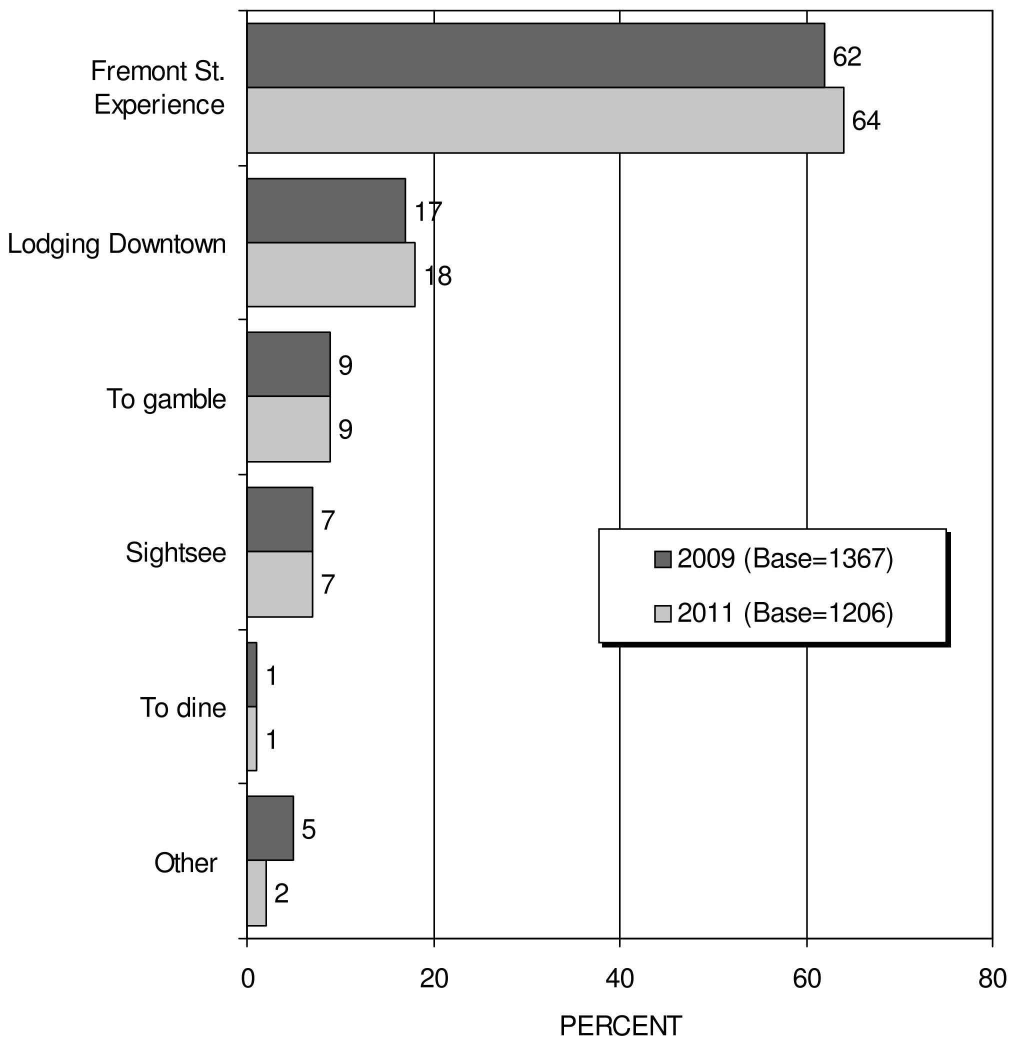
FIGURE 25
Whether Visited Downtown Las Vegas*



Thirty-six percent (36%) of visitors said they had visited Downtown Las Vegas on their current trip, down from 46% in 2008 and 45% in 2010 (Figure 25).

* Only “yes” responses are reported in this chart.

FIGURE 26
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 26). More than six in ten (64%) said it was to see the Fremont Street Experience. Eighteen percent (18%) said they were lodging Downtown and 9% said they went Downtown primarily to gamble. The number who said they visited Downtown primarily to sightsee was 7%.

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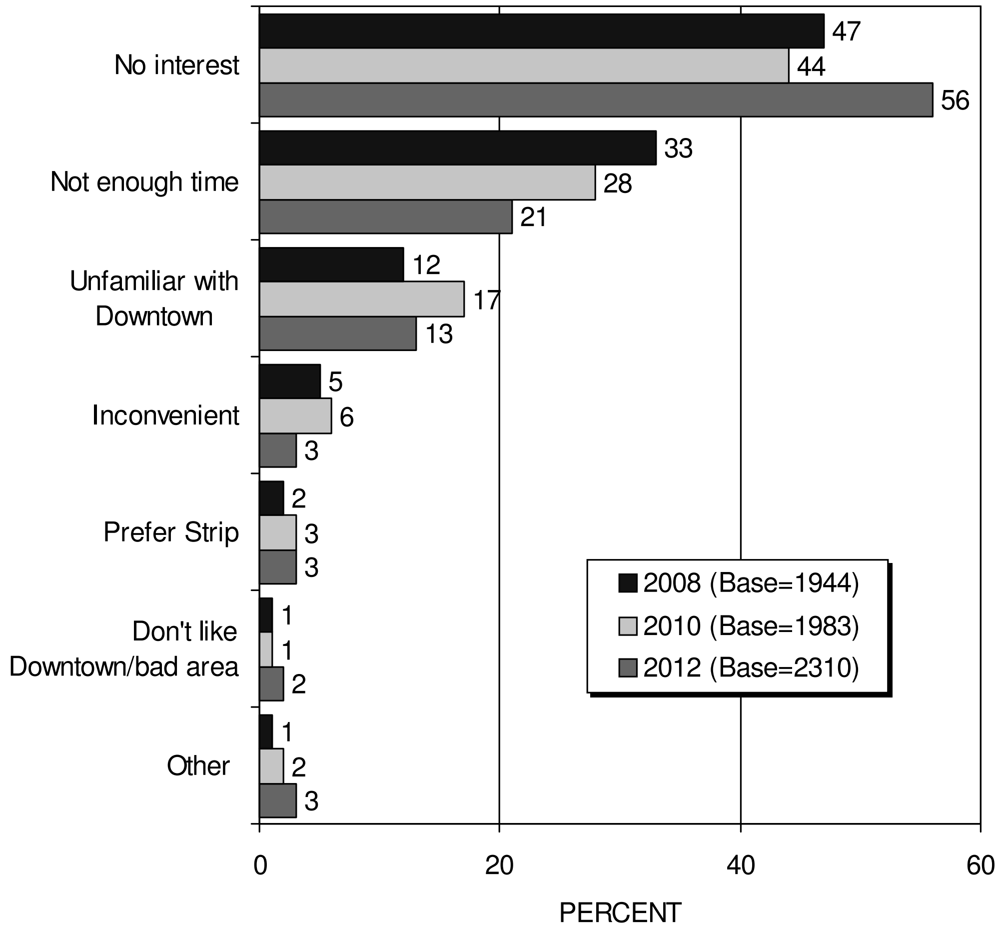
* This question is asked every other year and was not asked in 2008, 2010, or 2012.

FIGURE 27
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 27). More than one-half (56%) said it was because they were not interested in Downtown, up from 47% in 2008 and 44% in 2010. One in five (21%) said it was because they did not have enough time (down from 33% in 2008 and 28% in 2010), while 13% said they were unfamiliar with Downtown (down from 17% in 2010). Three percent (3%) each said they did not go Downtown because it was inconvenient (down from 5% in 2008 and 6% in 2010) or said they prefer the Strip area (up from 2% in 2008).

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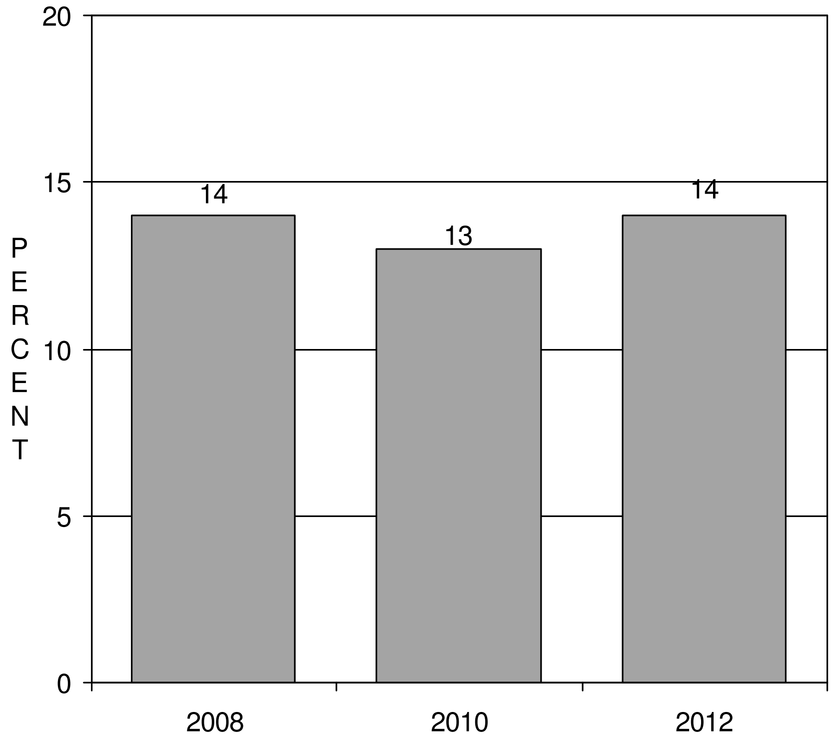
* This question is asked every other year and was not asked in 2009 or 2011.

FIGURE 28
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 28). Fourteen percent (14%) of visitors said they had, not significantly different from past results.

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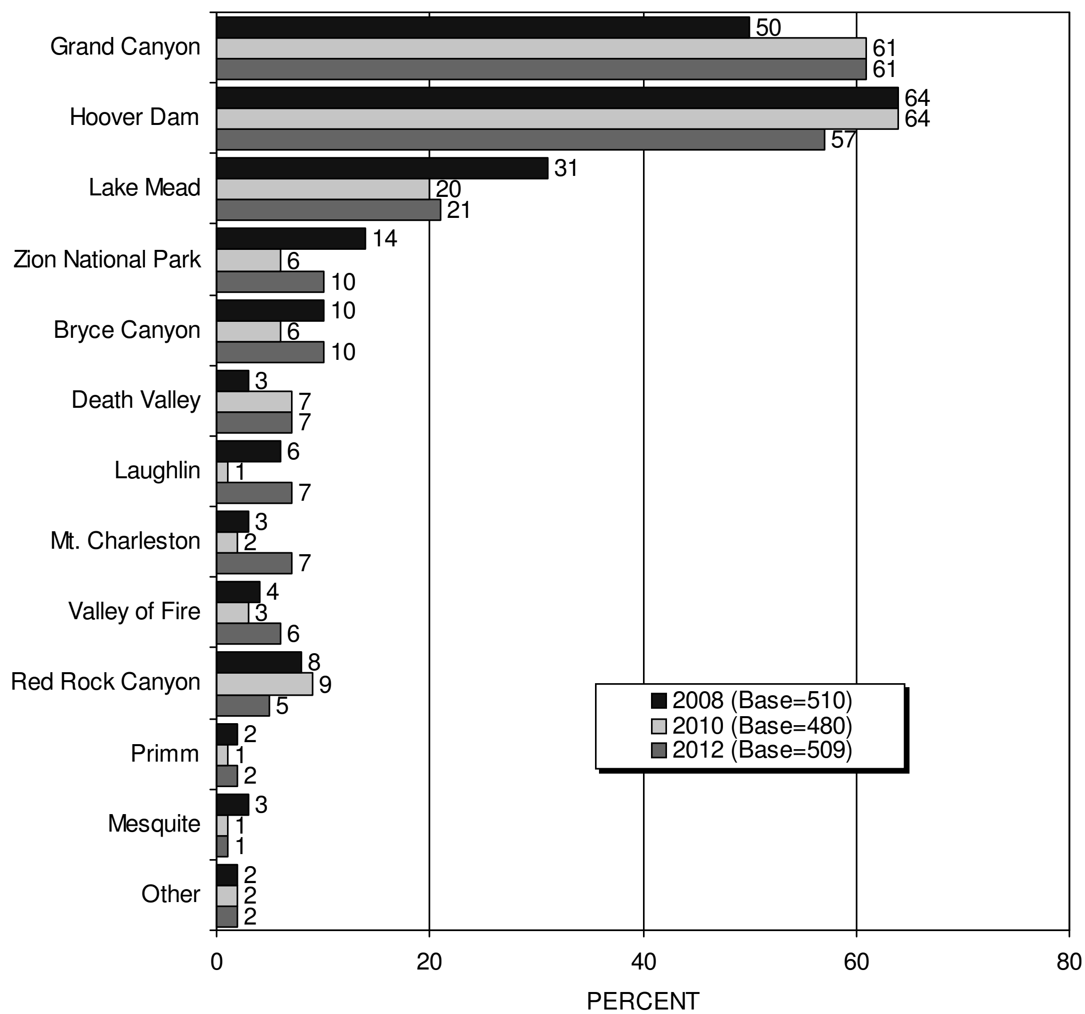
* Only "yes" responses are reported in this chart.

This question is asked every other year and was not asked in 2009 or 2011.

FIGURE 29
Other Nearby Places Visited*
(Among Those Who Planned to Visit Other Places – Asked Every Other Year)



Visitors were asked what other nearby destinations they had visited, or planned to visit (Figure 29). In 2012, visitors were most likely to say the Grand Canyon (61%, up from 50% in 2008), Hoover Dam (57%, down from 64% each in 2008 and 2010), and Lake Mead (21%, down from 31% in 2008). Ten percent (10%) said Zion National Park, another 10% said Bryce Canyon (up from 6% in 2010), while 7% each said Death Valley (up from 3% in 2008), Laughlin (up from 1% in 2010), and Mt. Charleston (up from past years). Six percent (6%) mentioned Valley of Fire (up from 3% in 2010), and 5% mentioned Red Rock.

---

* Multiple responses were permitted.

This question is asked every other year and was not asked in 2009 or 2011.

TRIP CHARACTERISTICS AND EXPENDITURES

Two-thirds (66%) of visitors traveled in parties of two, down significantly from 70% each in 2009 and 2011, and 69% in 2010 (Figure 30). Six percent (6%) 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 (up from past years). Eleven percent (11%) of visitors traveled alone, the same as the past four years. The average party size in 2012 was 2.4 persons, up significantly from 2.3 last year.

FIGURE 30
Adults In Immediate Party

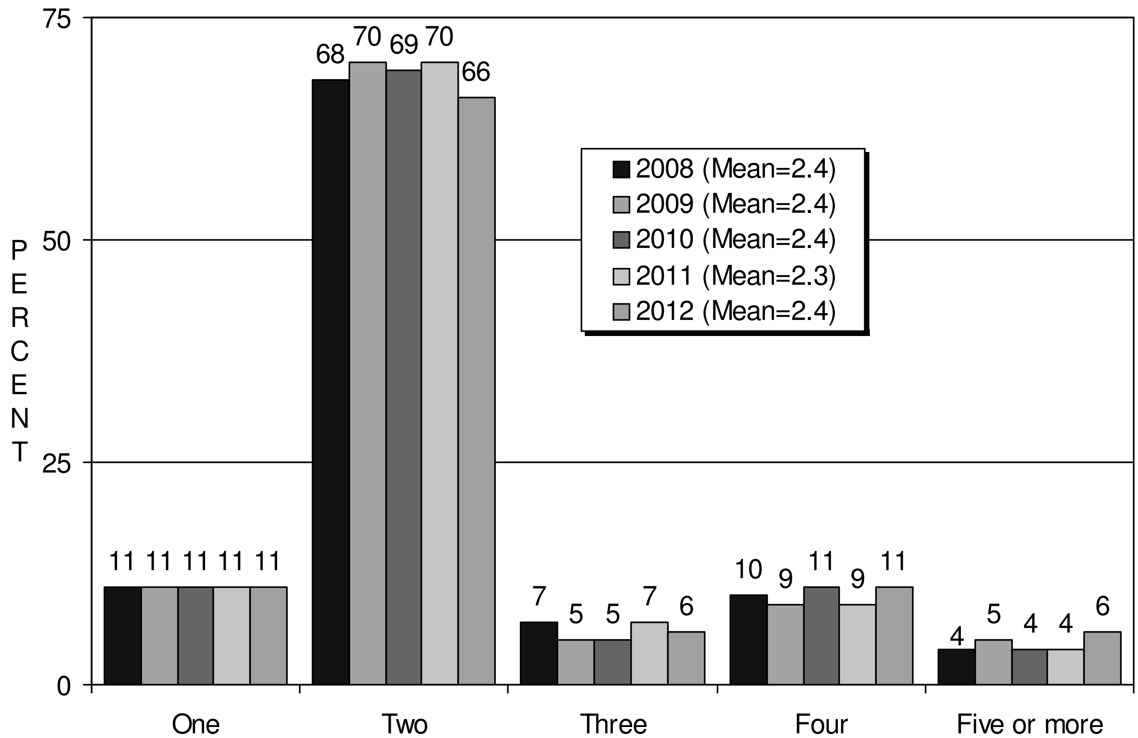
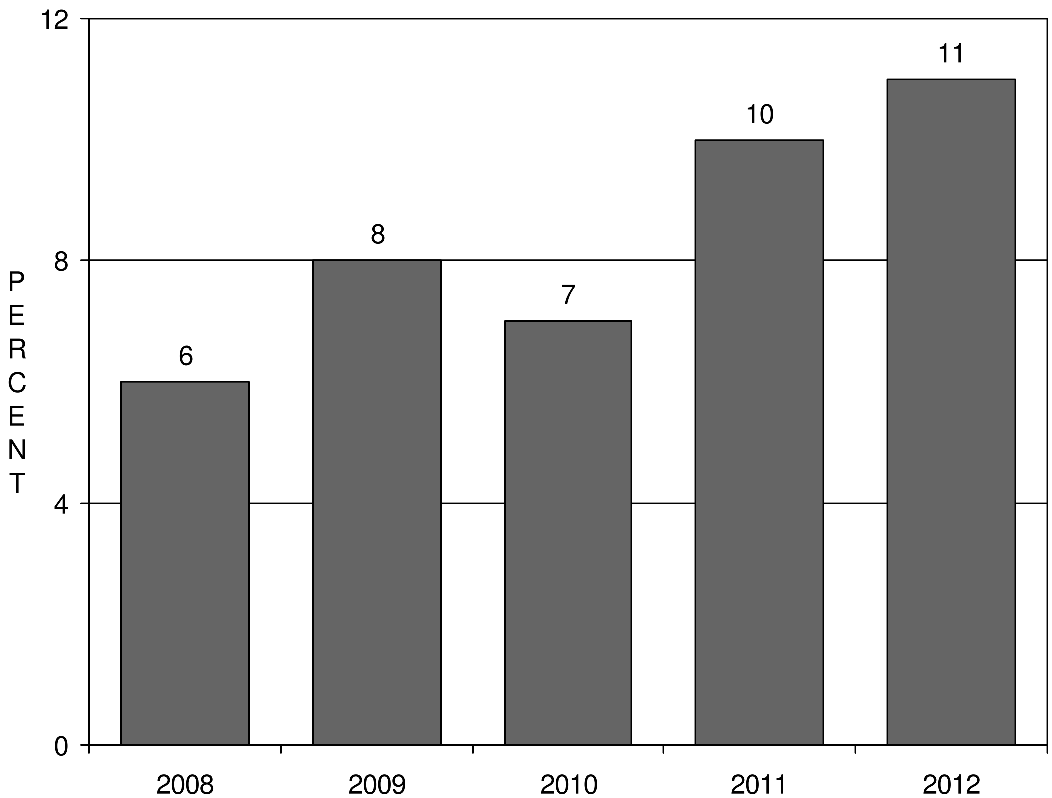


FIGURE 31
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 31). Eleven percent (11%) said they did, up significantly from 6% in 2008, 8% in 2009, and 7% in 2010.

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

FIGURE 32
Nights Stayed*

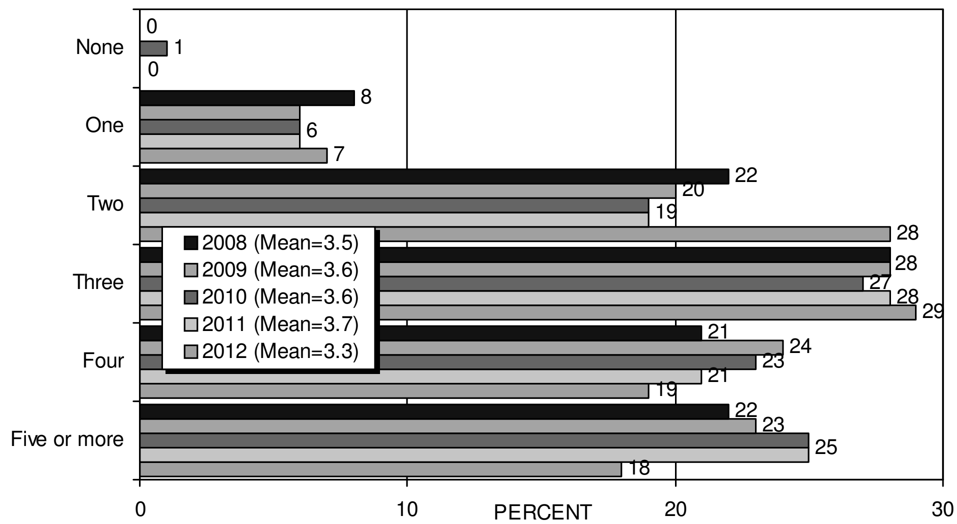
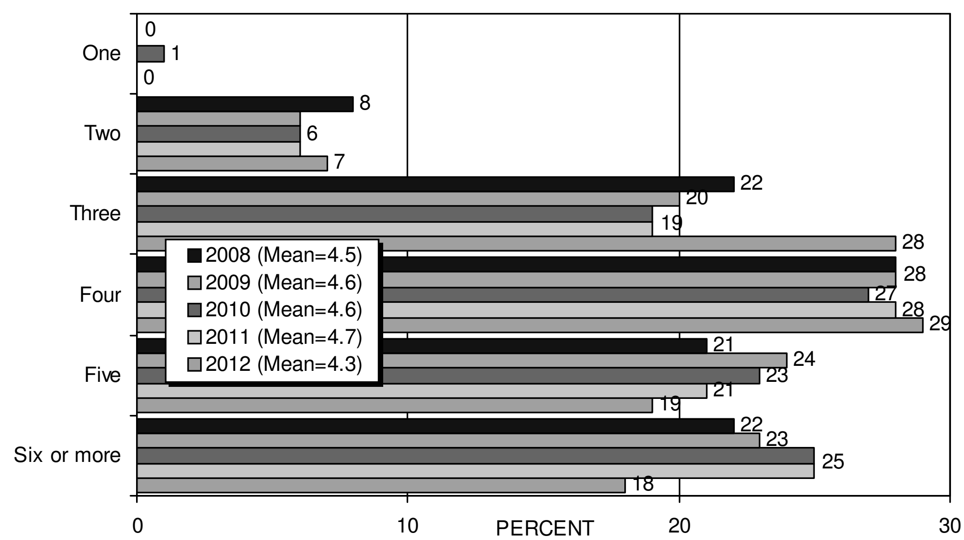


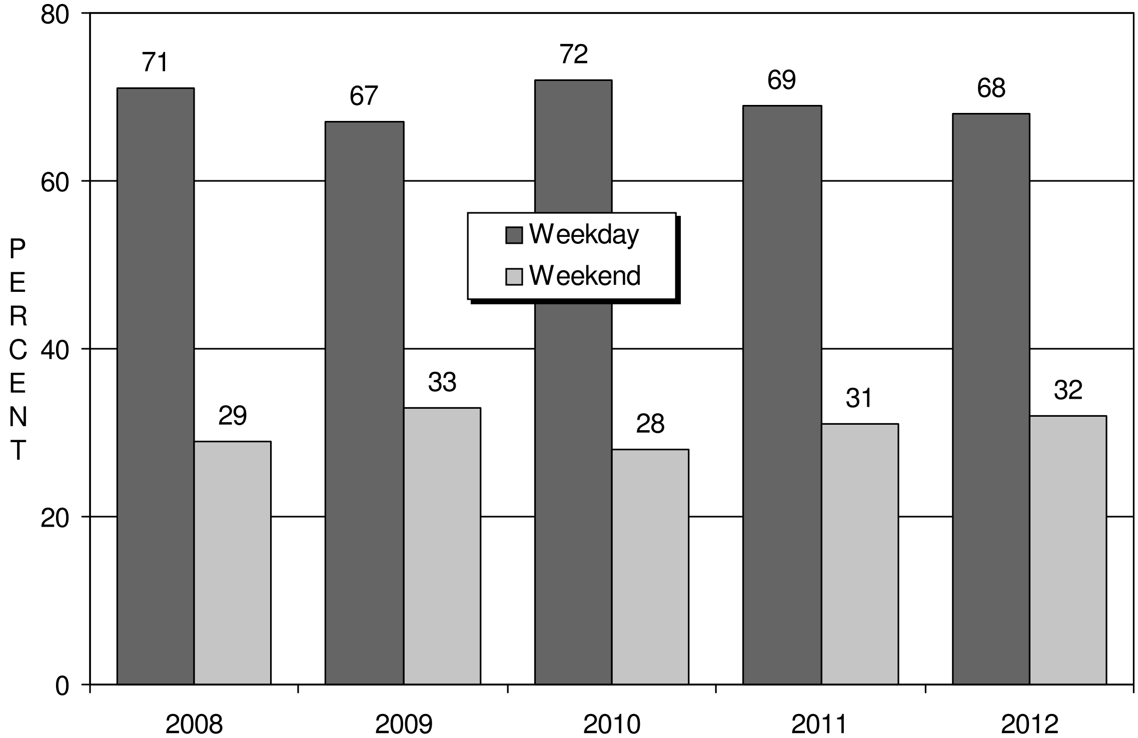
FIGURE 33
Days Stayed



In 2012, visitors stayed an average of 3.3 nights and 4.3 days in Las Vegas — down significantly from past years (Figures 32 and 33).

* Some changes in 2012 data results may in part be due to updated methodology.

FIGURE 34
Weekend Versus Weekday Arrival*



Thirty-two percent (32%) of visitors arrived in Las Vegas on a weekend (up significantly from 29% in 2008 and 28% in 2010), while 68% arrived on a weekday (down from 71% in 2008 and 72% in 2010) (Figure 34).

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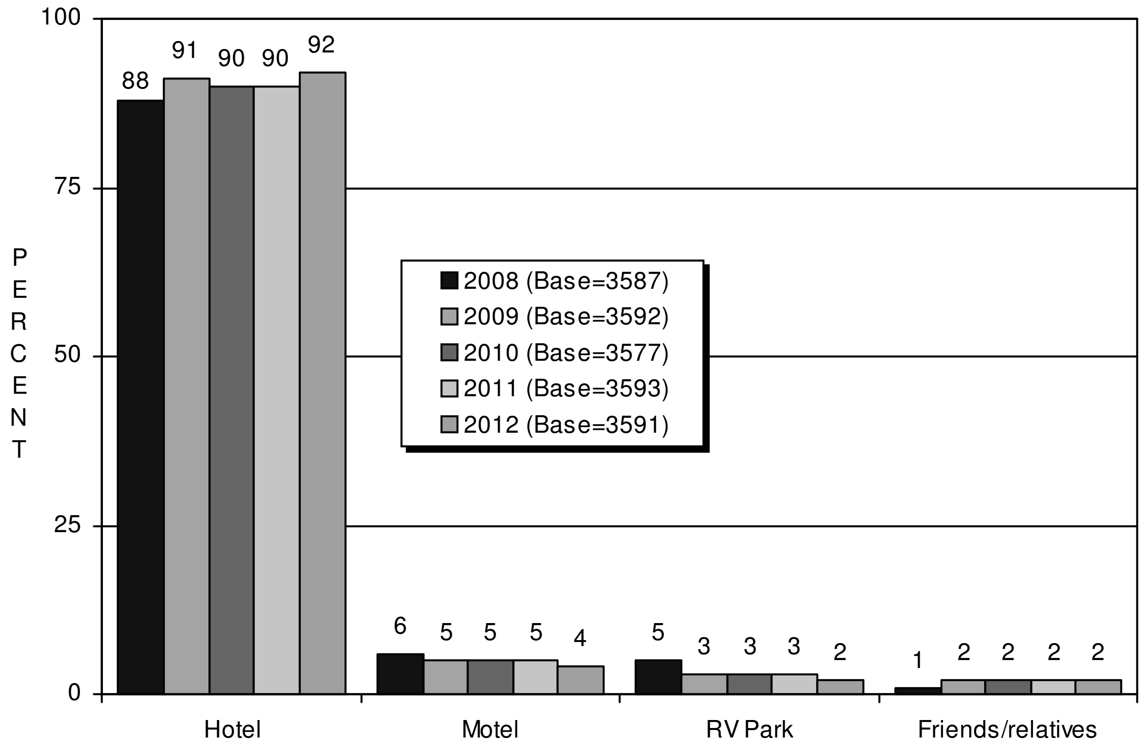
* *Weekday* is defined as Sunday through Thursday. *Weekend* is defined as Friday and Saturday.

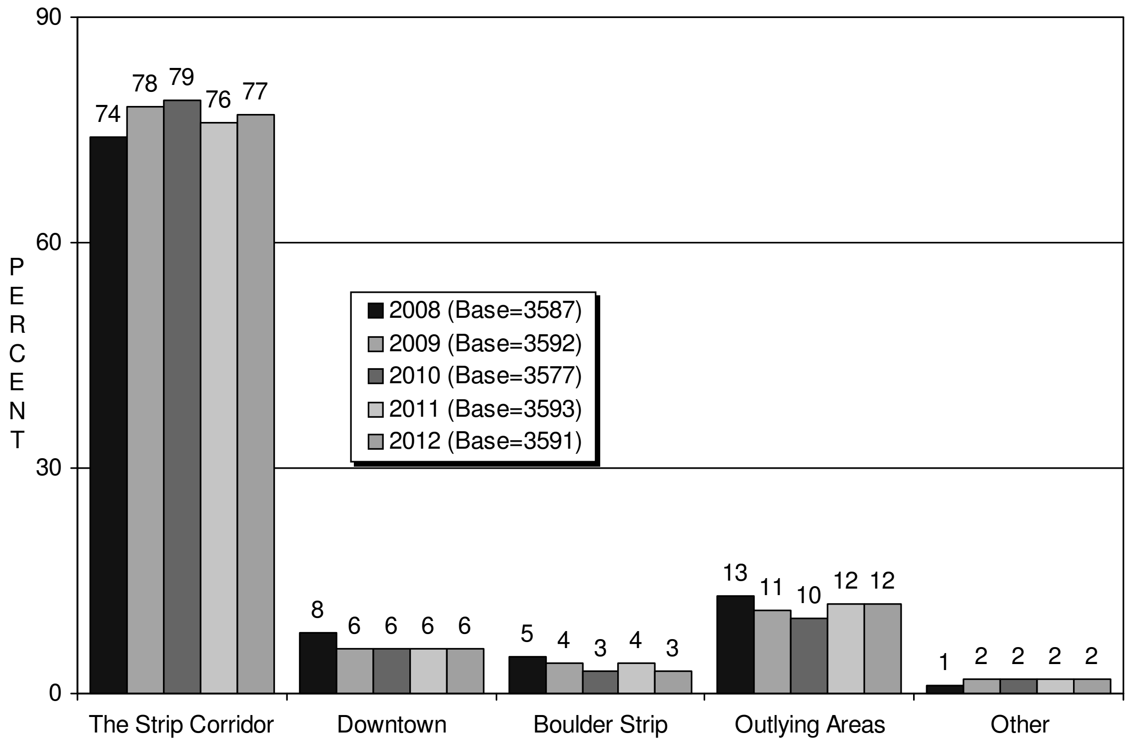
FIGURE 35
Type Of Lodging*
(Among Those Who Stayed Overnight)



Among visitors who stayed in Las Vegas overnight, 92% stayed in a hotel (up from 88% in 2008 and 90% each in 2010 and 2011), while 4% stayed in a motel (down from past years). Two percent (2%) stayed in an RV park (down from 5% in 2008), and 2% stayed with friends or relatives (up from 1% in 2008) (Figure 35).

* Includes respondents who stayed in a time share.

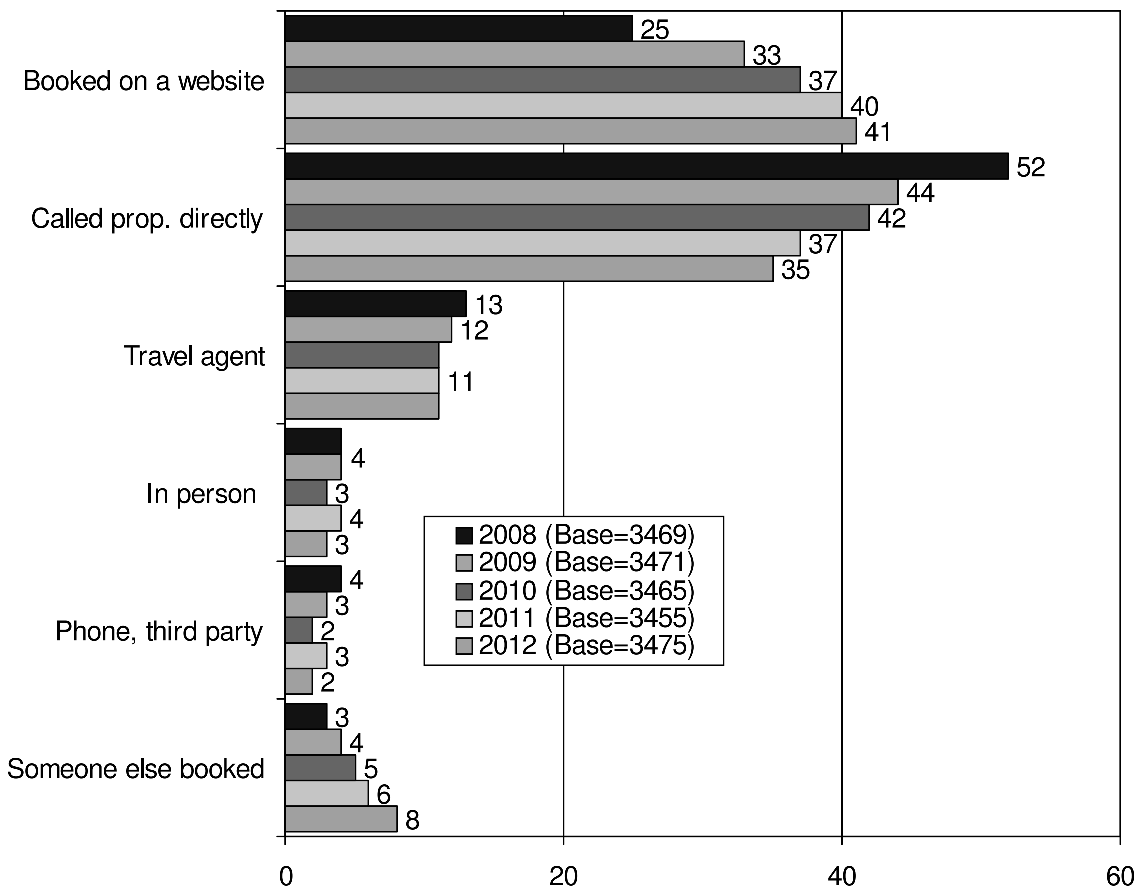
FIGURE 36
Location Of Lodging
(Among Those Who Stayed Overnight)



In terms of lodging location (among those who stayed overnight), 77% stayed in a property on the Strip Corridor* (up from 74% in 2008), 6% stayed Downtown (down from 8% in 2008), and 3% stayed on the Boulder Strip (down from 5% in 2008). Twelve percent (12%) stayed in outlying parts of Las Vegas (up from 10% in 2010), and 2% stayed in other areas (Figure 36).

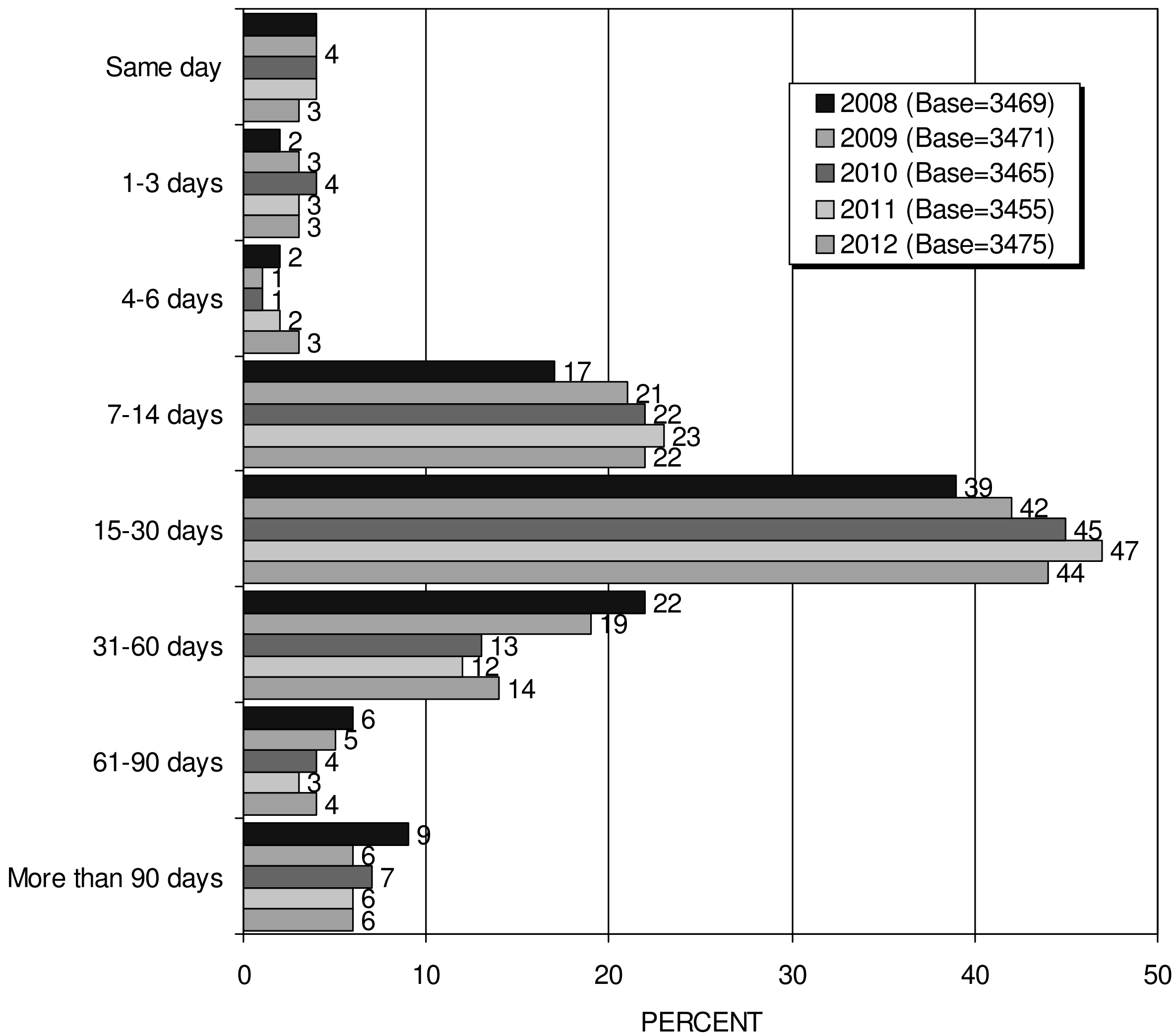
* The Strip Corridor includes properties located directly on Las Vegas Boulevard South, as well as properties near the Strip, between Valley View Road and Paradise Road.

FIGURE 37
How Booked Accommodations In Las Vegas
(Among Those Who Stayed In A Hotel/Motel/RV Park)



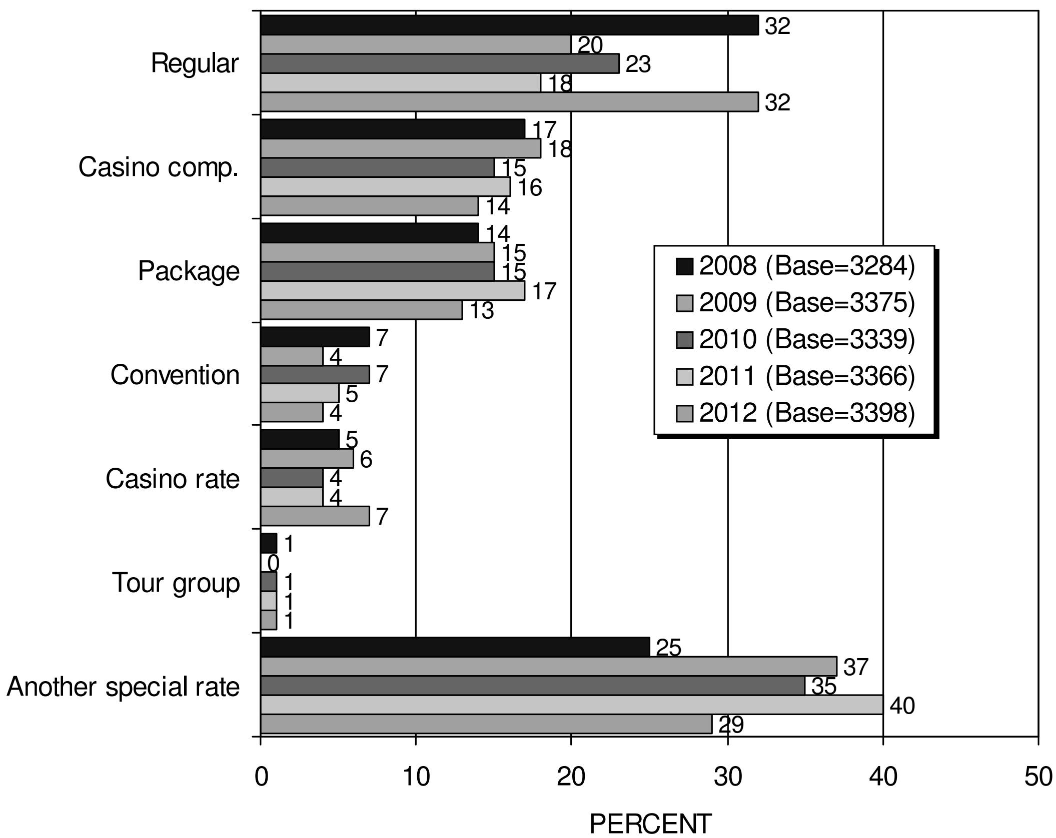
Visitors who stayed at a hotel, motel, or RV park were asked how they booked their accommodations in Las Vegas (Figure 37). In 2012, 41% said they used a website (up significantly from 25% in 2008, 33% in 2009, and 37% in 2010). Thirty-five percent (35%) said they called the hotel, motel, or RV park directly (down significantly from 52% in 2008, 44% in 2009, and 42% in 2010). Eleven percent (11%) said they booked through a travel agent. Three percent (3%) said they booked in person (down from 4% each in 2008, 2009, and 2011), and 2% (down from 4% in 2008) booked by phone through a third party (but not a travel agent).

FIGURE 38
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 38). About one in four (24%) visitors booked more than a month in advance, down significantly from 37% in 2008 and 30% in 2009, but up from 21% last year. By contrast, two-thirds (66%) of visitors booked one week to one month in advance, up significantly from 56% in 2008 and 63% in 2009, but down from 70% last year. Nine percent (9%) of visitors reported making their reservations less than one week before arrival, up from 8% each in 2008 and 2009.

FIGURE 39
Type Of Room Rates
(Among Those Staying In A Hotel Or Motel)



Visitors staying in a hotel or motel were shown a card describing various room rates* and were asked which type of room rate they had received (Figure 39). Nearly one-third (32%) of these visitors said they paid a regular room rate, up from 20% in 2009, 23% in 2010, and 18% in 2011. Fourteen percent (14%) received a casino complimentary rate (down from 17% in 2008 and 18% in 2009), while 7% paid a casino rate (up from past years). Thirteen percent (13%) of visitors paid a package rate (down from 17% last year), while 1% received a tour group rate (up from less than 1% in 2009). Four percent (4%) paid a convention rate (down from 7% each in 2008 and 2010). The remaining 29% paid some other kind of special rate, up from 25% in 2008, but down from 37% in 2009, 35% in 2010, and 40% last year.

* 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 40
Room Rate By Booking Method (2012)

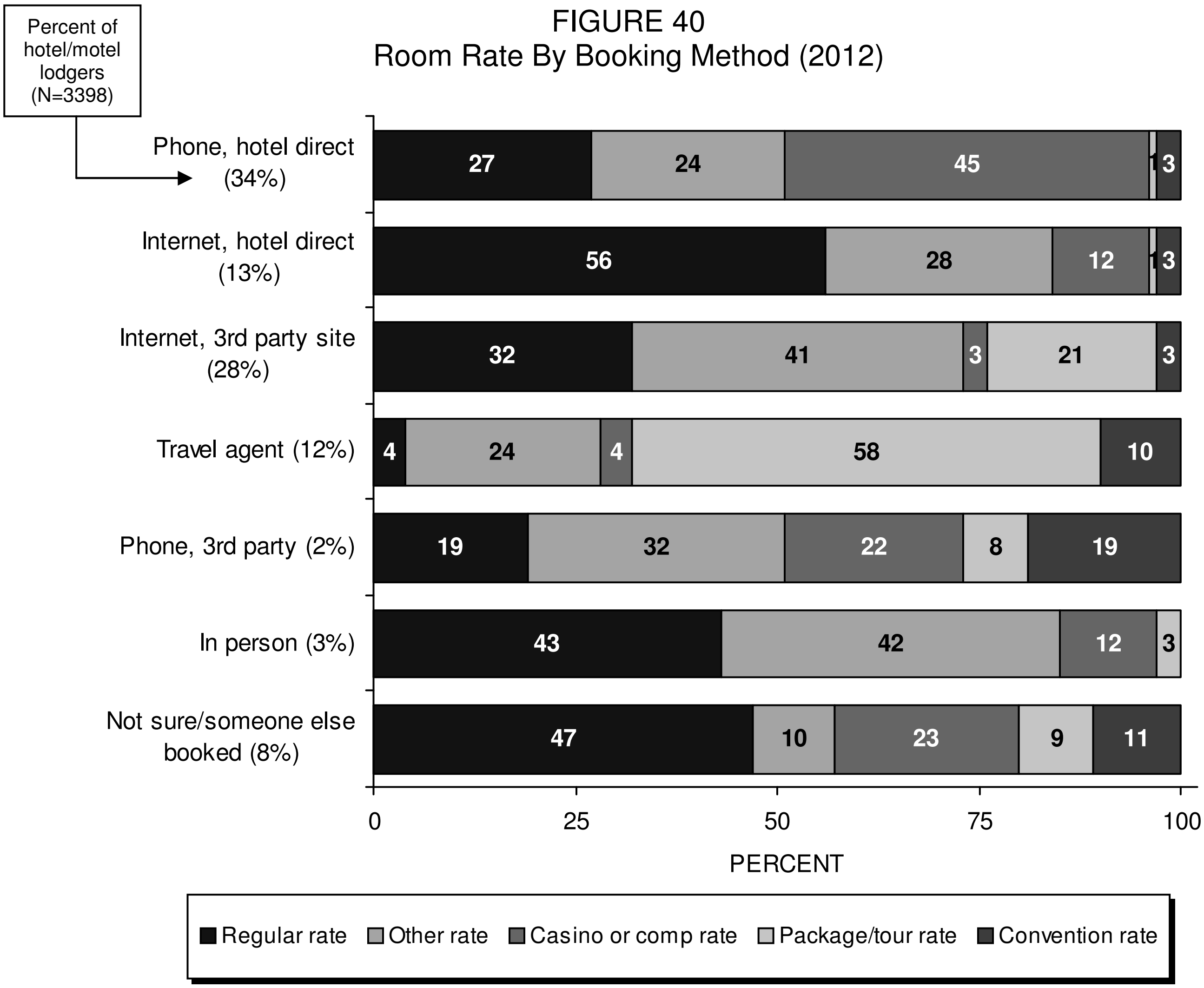
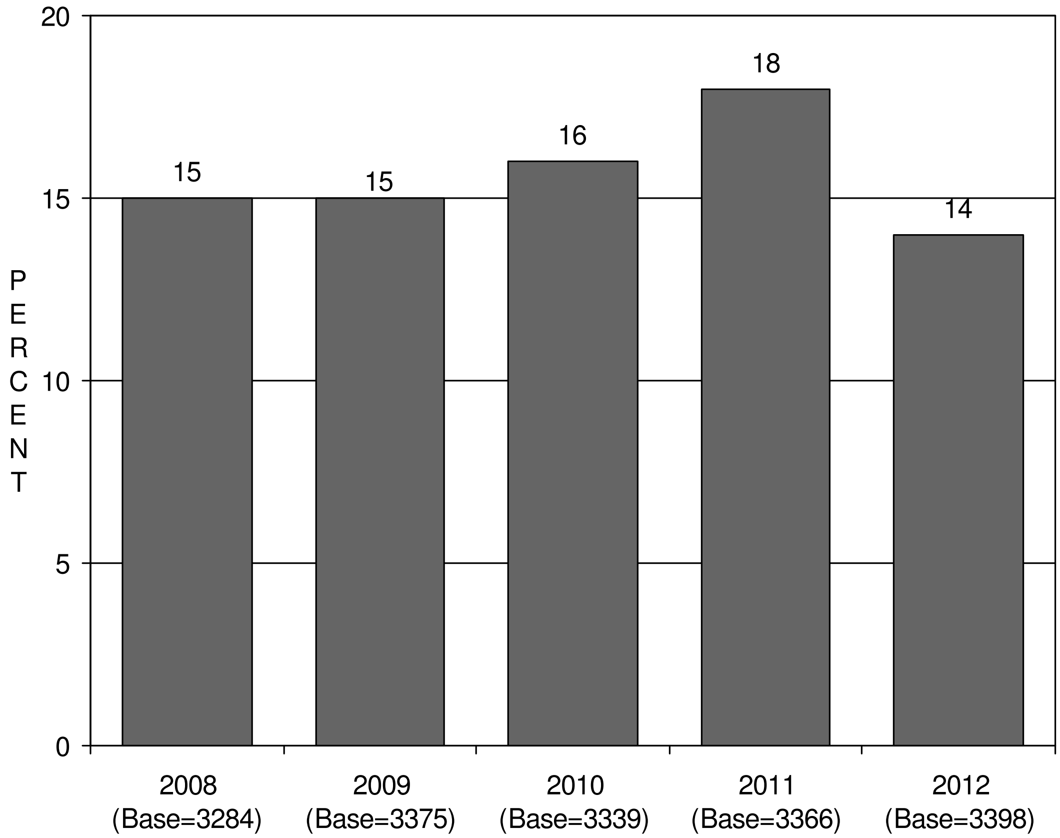


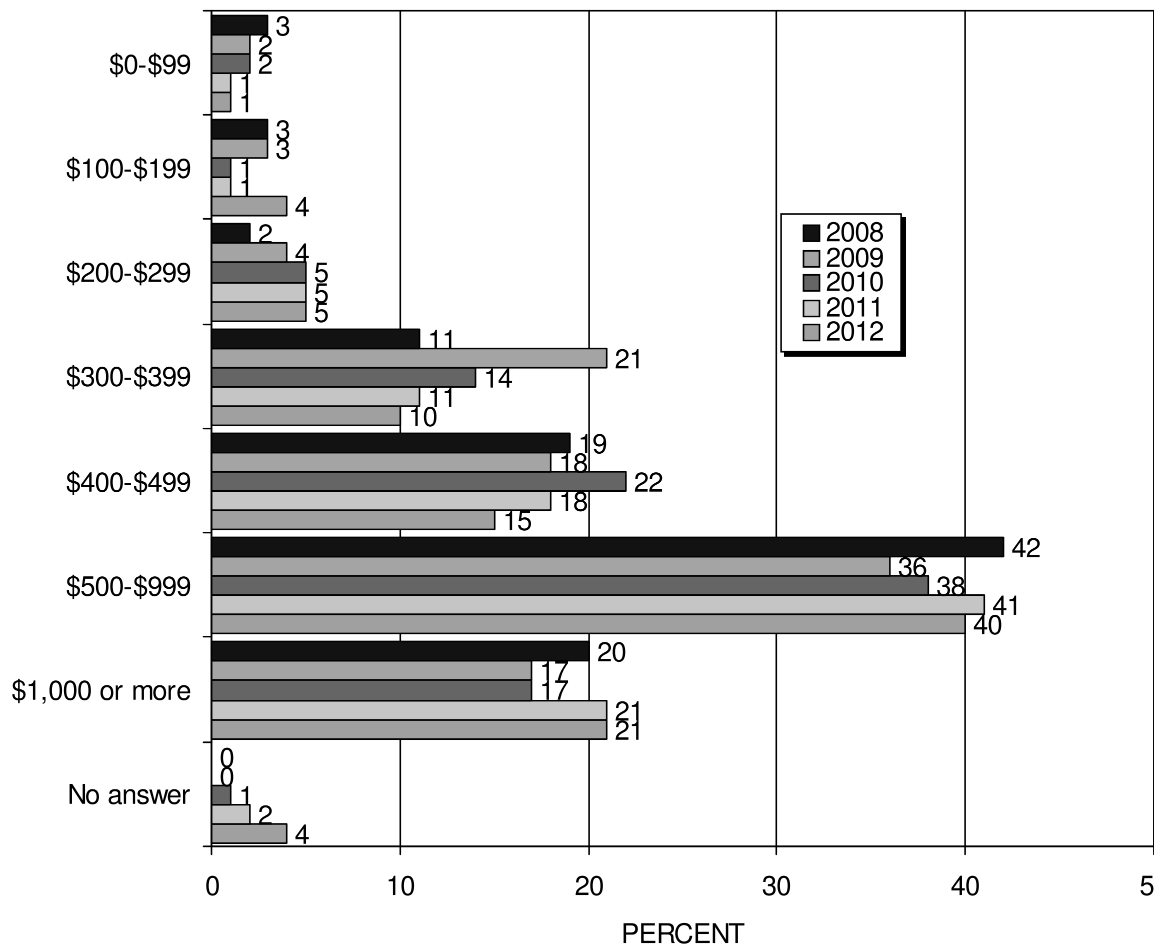
Figure 40 shows the room rate category by the booking method for 2012 among those staying in a hotel or motel. Of those who called the hotel directly, 45% received a casino or casino complimentary rate, while 27% received a regular rate, and 24% received a special rate. Of those who booked their room on the Internet through a third-party site, 41% received a special room rate, 32% received a regular rate, and 21% received a package rate. Fifty-eight percent (58%) of those who booked through a travel agent received a package rate, while nearly one-quarter (24%) received a special rate. Among those who booked directly on a hotel website, 56% received a regular room rate and 28% received a special rate. Among those who booked in person, 43% received a regular rate, and 42% received a special rate. Among those who booked through a third party by phone, 32% received a special rate, 22% received a casino rate, while 19% each received a convention rate or a regular rate.

FIGURE 41
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, down from 18% last year (Figure 41).

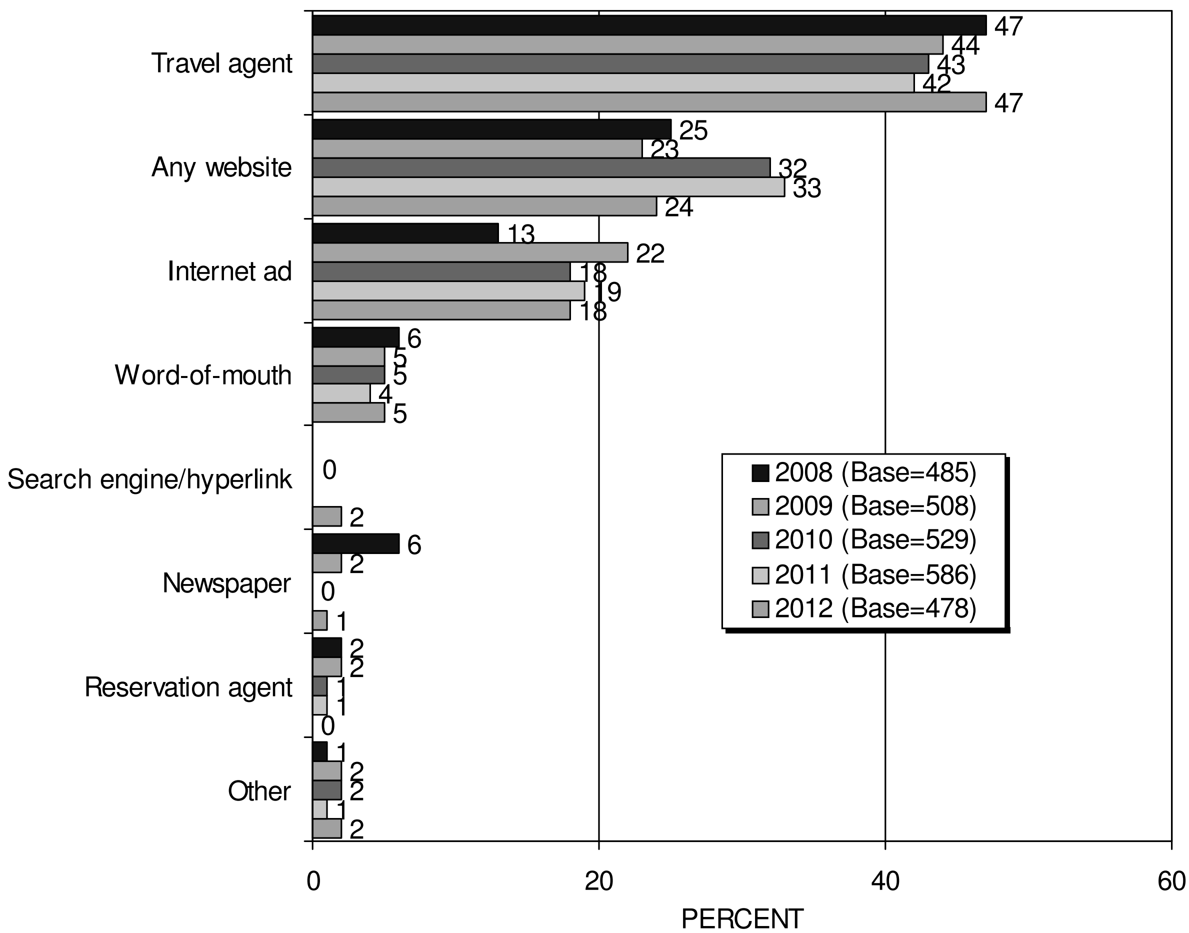
FIGURE 42
Cost Of Package Per Person
(Among Those Who Bought A Package)



Means: 2008=$746.69; 2009=$640.29; 2010=$651.02; 2011=$757.83; 2012=$743.65
Base Sizes: 2008=485; 2009=508; 2010=529; 2011=586; 2012=478

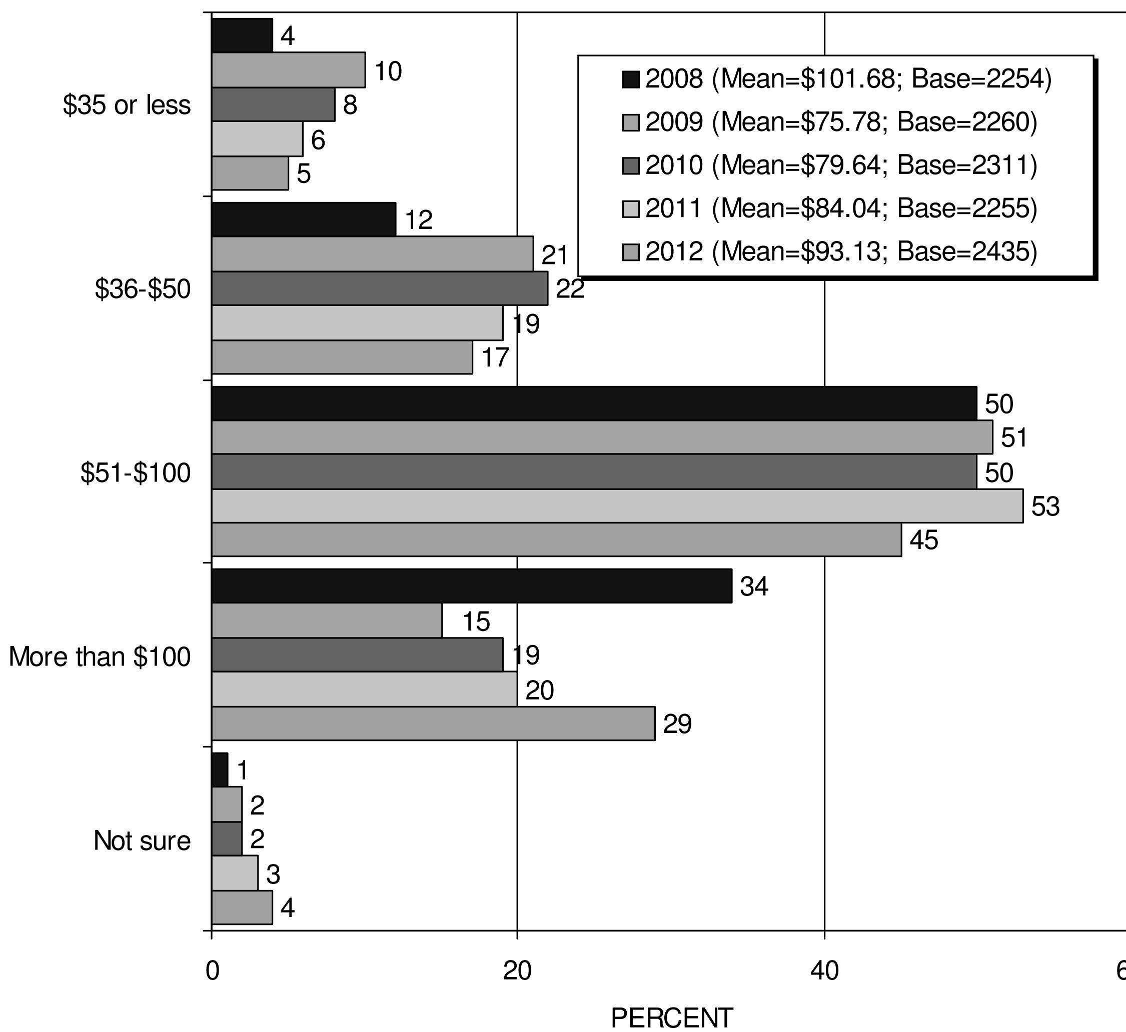
We asked those who had purchased a hotel, airline, or a tour/travel group package how much their packages cost per person (Figure 42). The average cost of such a package in 2012 was $743.65, up significantly from $640.29 in 2009 and $651.02 in 2010.

FIGURE 43
Where First Heard About The Package
(Among Those Who Bought A Package)



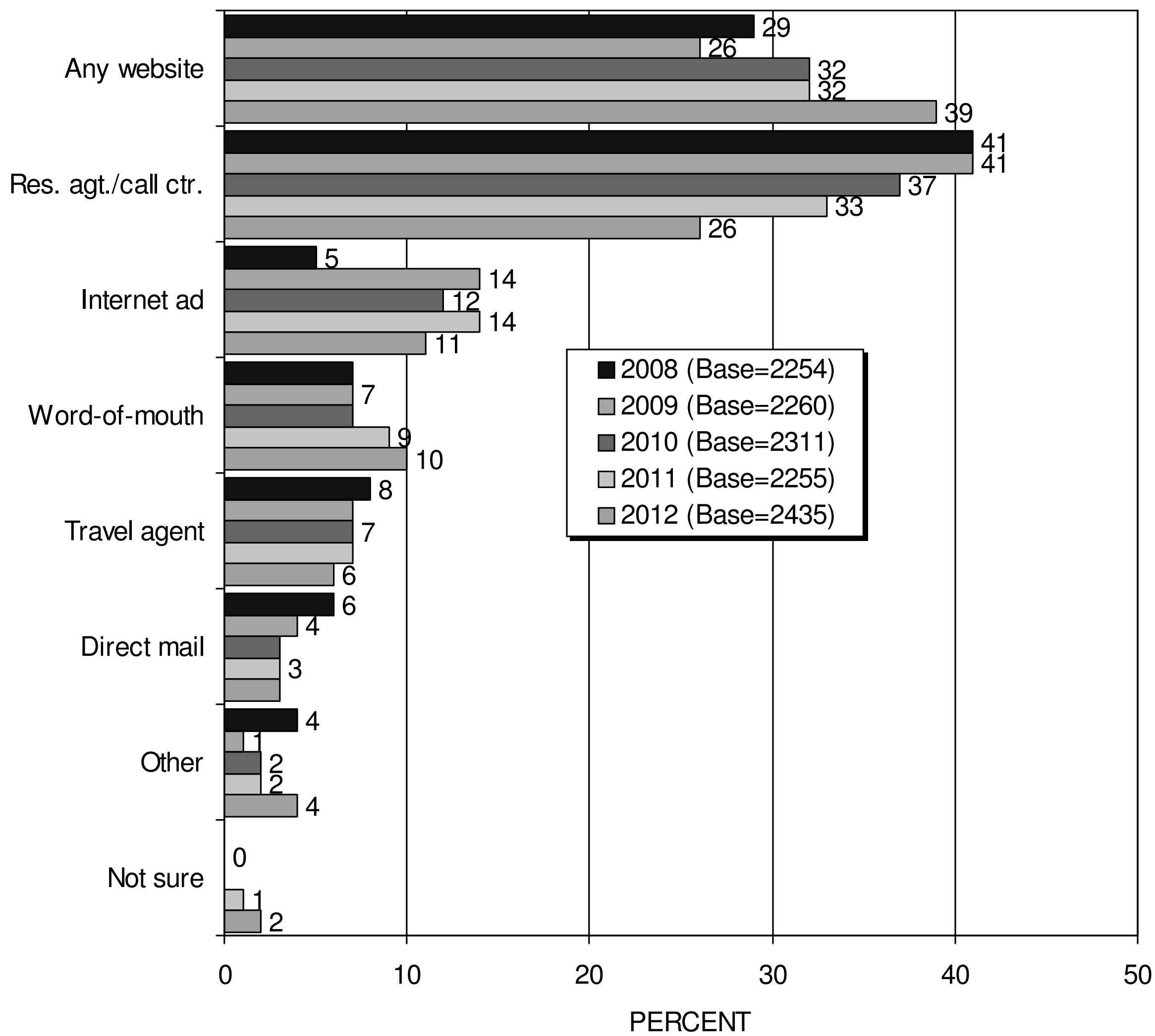
Package purchasers were asked where they first heard about the package they bought (Figure 43). Forty-seven percent (47%) said from a travel agent. One-quarter (24%) mentioned a website (down from 32% in 2010 and 33% in 2011), while 18% said an Internet ad. Five percent (5%) said through word of mouth, 2% said through a search engine or hyperlink (up from past readings), 1% said from a newspaper (down from 6% in 2008), and less than 1% said from a reservation agent (down from 2% each in 2008 and 2009).

FIGURE 44
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package)



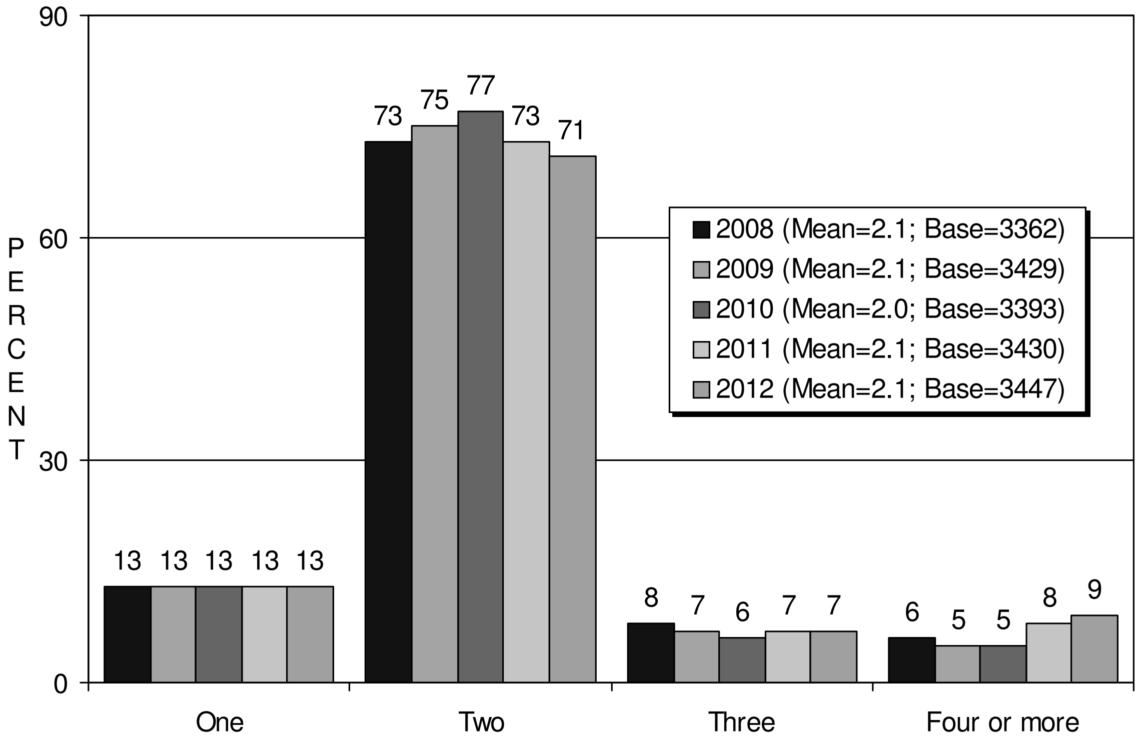
We looked at lodging expenditures among those who did *not* purchase travel packages (Figure 44). Forty-five percent (45%) of these non-package visitors paid between $51 and $100 per night for their room, down from past years. Twenty-nine percent (29%) paid more than $100 per night, down from 34% in 2008, but up from 15% in 2009, 19% in 2010, and 20% last year. The average daily room rate for non-package visitors in 2012 was $93.13, down from $101.68 in 2008, but up from $75.78 in 2009, $79.64 in 2010 and $84.04 last year.

FIGURE 45
How First Found Out About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



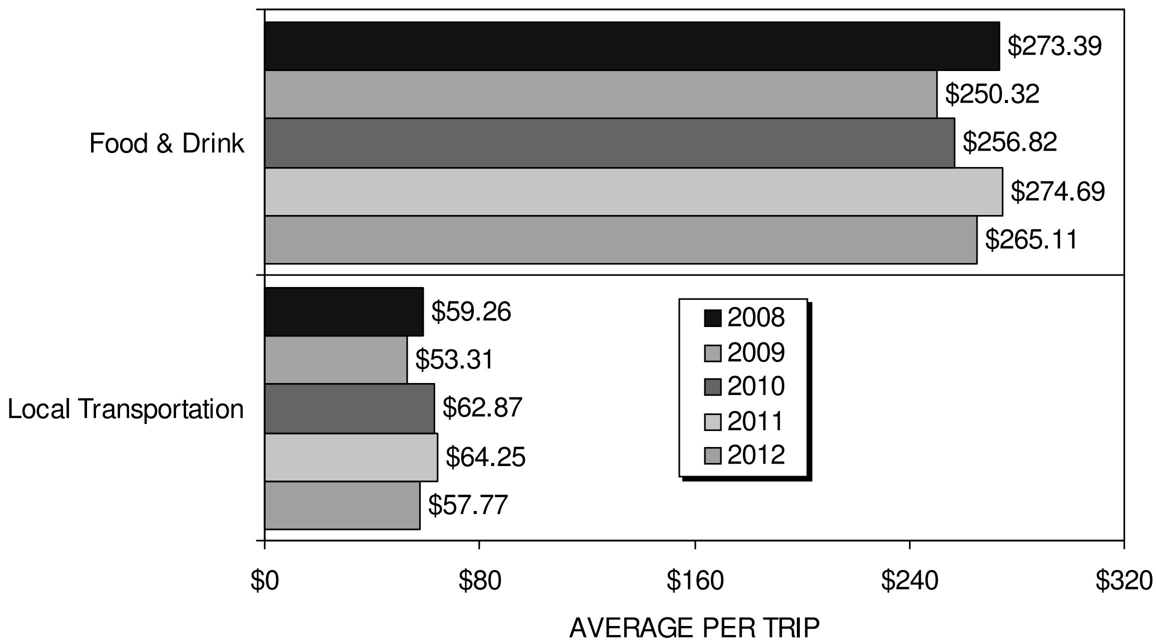
Visitors were asked how they first found out about the room rate they paid (Figure 45). About four in ten (39%) mentioned a website, up from past years. One-quarter (26%) said it was through a reservation agent or call center, down significantly from 41% each in 2008 and 2009, 37% in 2010, and 33% last year. Eleven percent (11%) mentioned an Internet ad (up from 5% in 2008 but down from 14% each in 2009 and 2011), while 10% mentioned word-of-mouth (up from 7% each from 2008 – 2010), 6% mentioned a travel agent, and 3% mentioned direct mail (down from 6% in 2008 and 4% in 2009).

FIGURE 46
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



As in past years, the majority of visitors who stayed in a hotel or motel (71%, down from past years) said two people stayed in their room (Figure 46). Thirteen percent (13%) said they were lodging alone, 7% said three people stayed in their room, while 9% said four or more people stayed in their room (up significantly from 6% in 2008, 5% each in 2009 and 2010, and 8% last year). The mean (average) number of room occupants (2.1) was up significantly from 2.0 in 2010.

FIGURE 47
Average Trip Expenditures On Food & Drink —
And On Local Transportation*
(Including Visitors Who Spent Nothing In That Category)



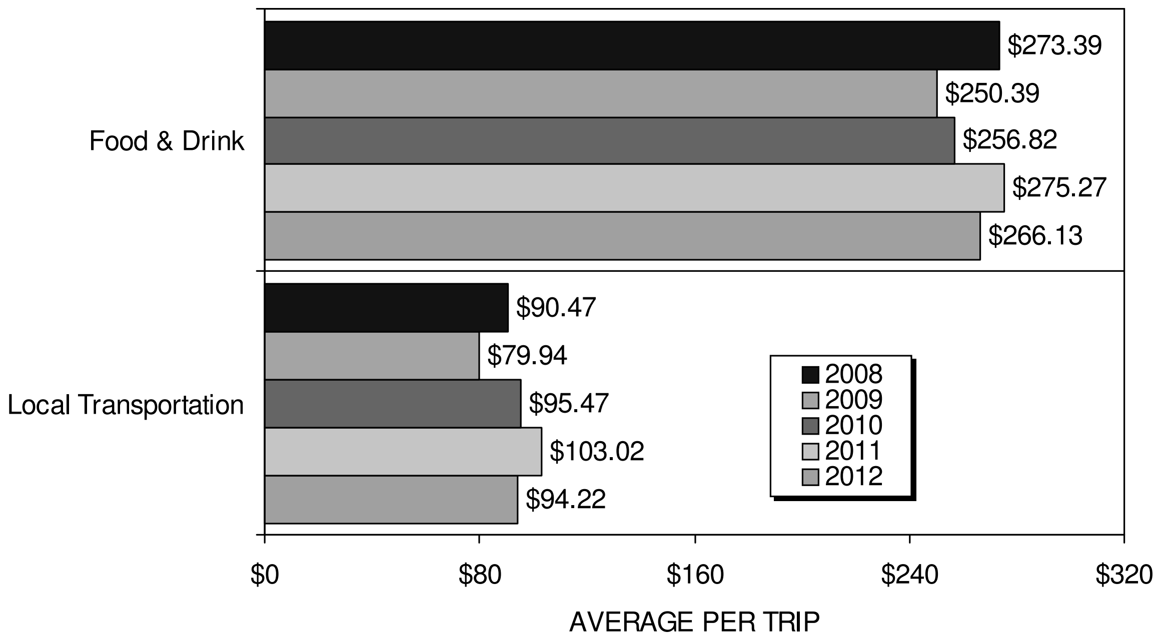
We asked all visitors about their daily expenditures on food and drink and on local transportation.

Figure 47 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 2012 was $265.11, up significantly from $250.32 in 2009, but down significantly from $274.69 last year.

The average transportation expenditure for 2012 was $57.77, up significantly from $53.31 in 2009, but down from $62.87 in 2010 and $64.25 last year.

* 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 48
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, the average trip expenditure on food and drink in 2012 was $266.13, up significantly from $250.39 in 2009 and $256.82 in 2010, but down from $275.27 last year (Figure 48). The average trip expenditure on local transportation for 2012 was $94.22, up significantly from $79.94 in 2009 but down from $103.02 last year.

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

	2008	2009	2010	2011	2012
Food and Drink					
Base size	(3601)	(3598)	(3601)	(3592)	(3588)
Proportion of total	100.0%	100.0%	100.0%	99.8%	99.6%
Local Transportation					
Base size	(2358)	(2400)	(2372)	(2246)	(2209)
Proportion of total	65%	67%	66%	62%	61%

FIGURE 49
Average Trip Expenditures On
Shopping, Shows, And Sightseeing
(Including Visitors Who Spent Nothing In That Category)

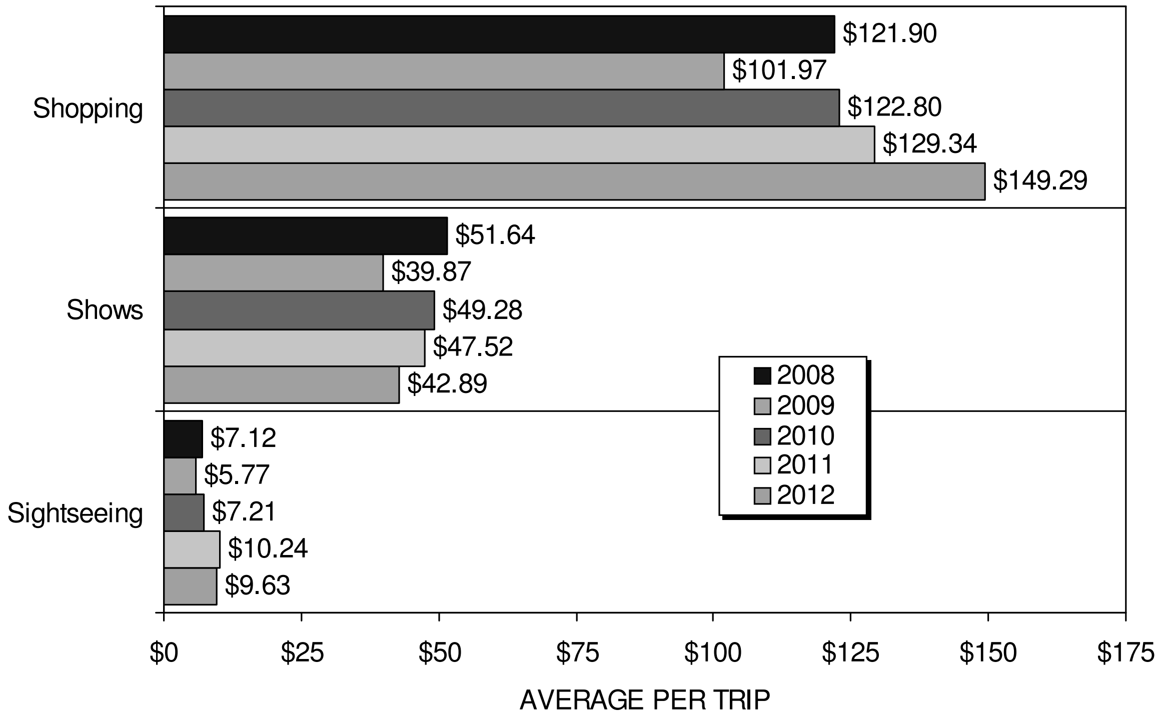
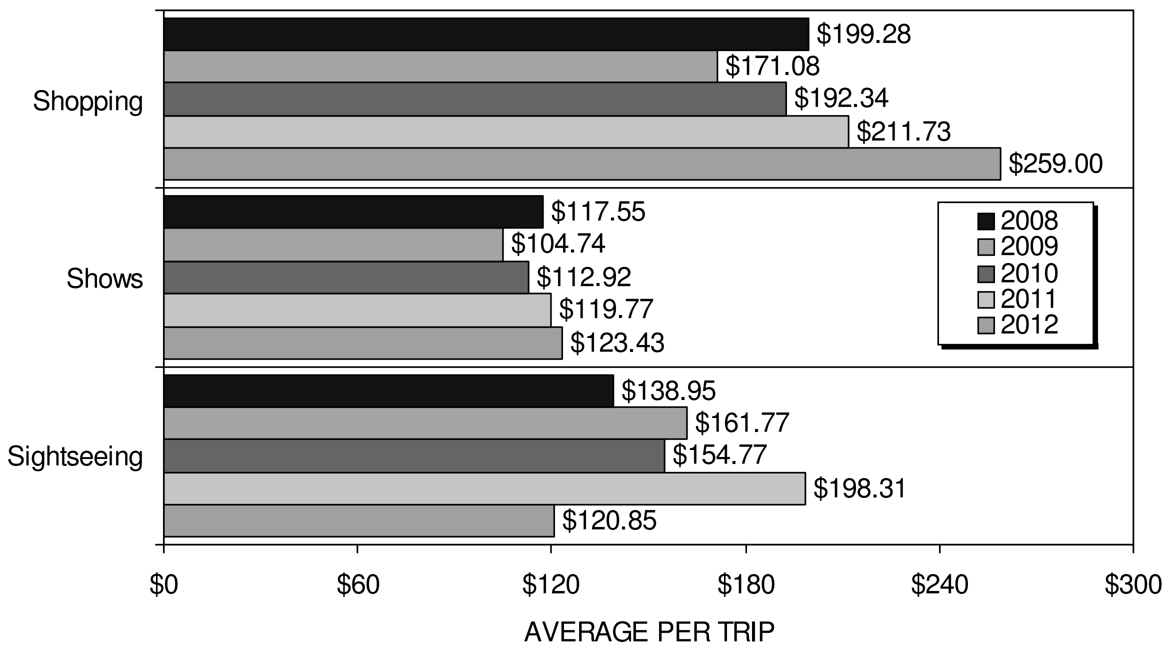


Figure 49 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas — *including visitors who said they spent nothing* in these categories. The average trip expenditure on shopping was $149.29, up significantly from past years. The average expenditure on shows was $42.89, down from $51.64 in 2008, $49.28 in 2010, and $47.52 last year. The average expenditure on sightseeing was $9.63, up from $7.12 in 2008, $5.77 in 2009, and $7.21 in 2010.

FIGURE 50
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 $259.00, up significantly from past years (Figure 50). The average trip total spent on shows was $123.43, up from $104.74 in 2009 and $112.92 in 2010. The sightseeing total was $120.85, down from 2009 – 2011 results.

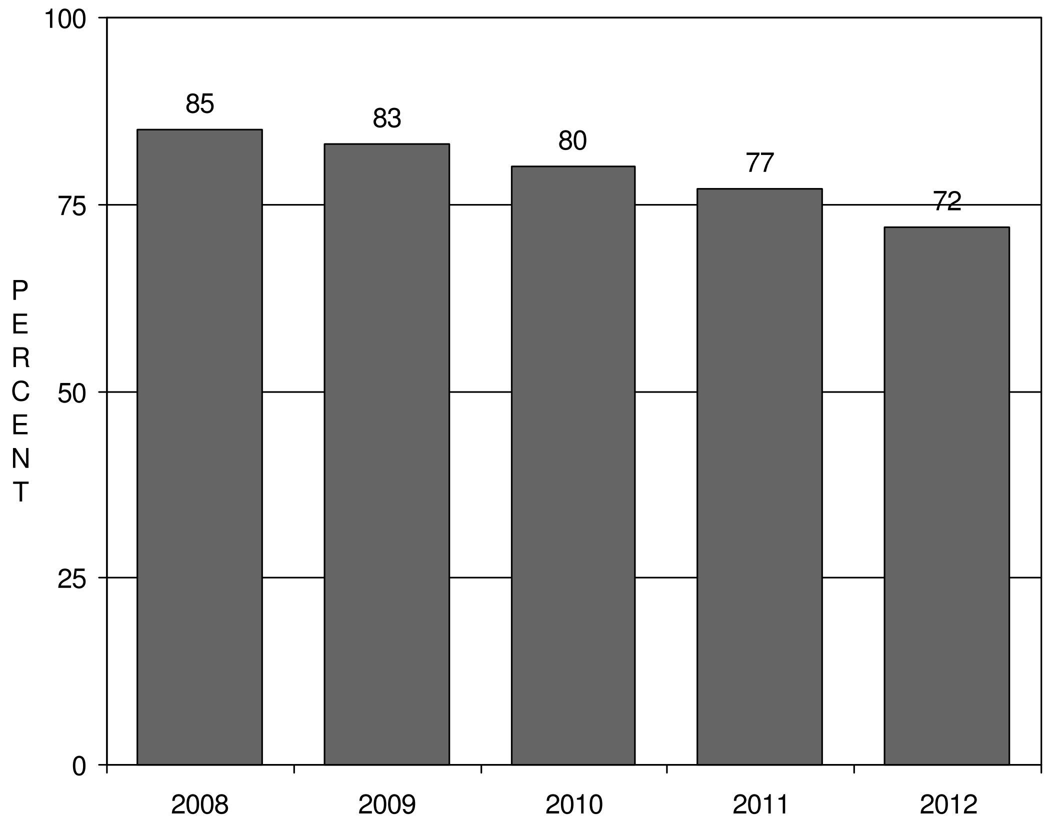
† Percentages of respondents who spent money in each category are shown in the following table:

	2008	2009	2010	2011	2012
Shopping					
Base size	(2203)	(2145)	(2302)	(2201)	(2077)
Proportion of total	61%	60%	64%	61%	58%
Shows					
Base size	(1582)	(1370)	(1573)	(1429)	(1255)
Proportion of total	44%	38%	44%	40%	35%
Sightseeing					
Base size	(185)	(128)	(168)	(186)	(287)
Proportion of total	5%	4%	5%	5%	8%

GAMING BEHAVIOR AND BUDGETS

Seventy-two percent (72%) of all visitors said they gambled while in Las Vegas, down significantly from 85% in 2008, 83% in 2009, 80% in 2010, and 77% in 2011 (Figure 51).

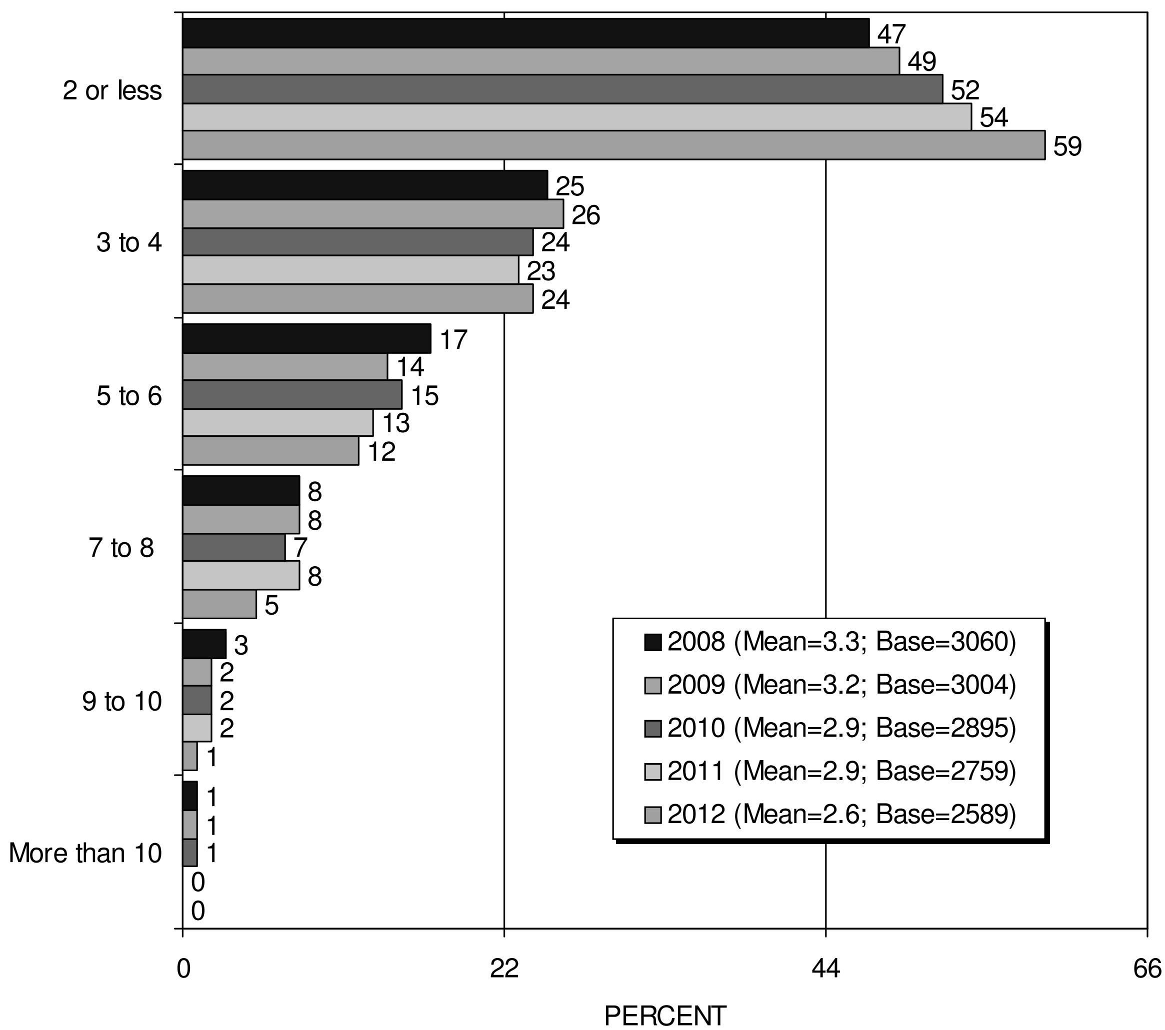
FIGURE 51
Whether Gambled While In Las Vegas*



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

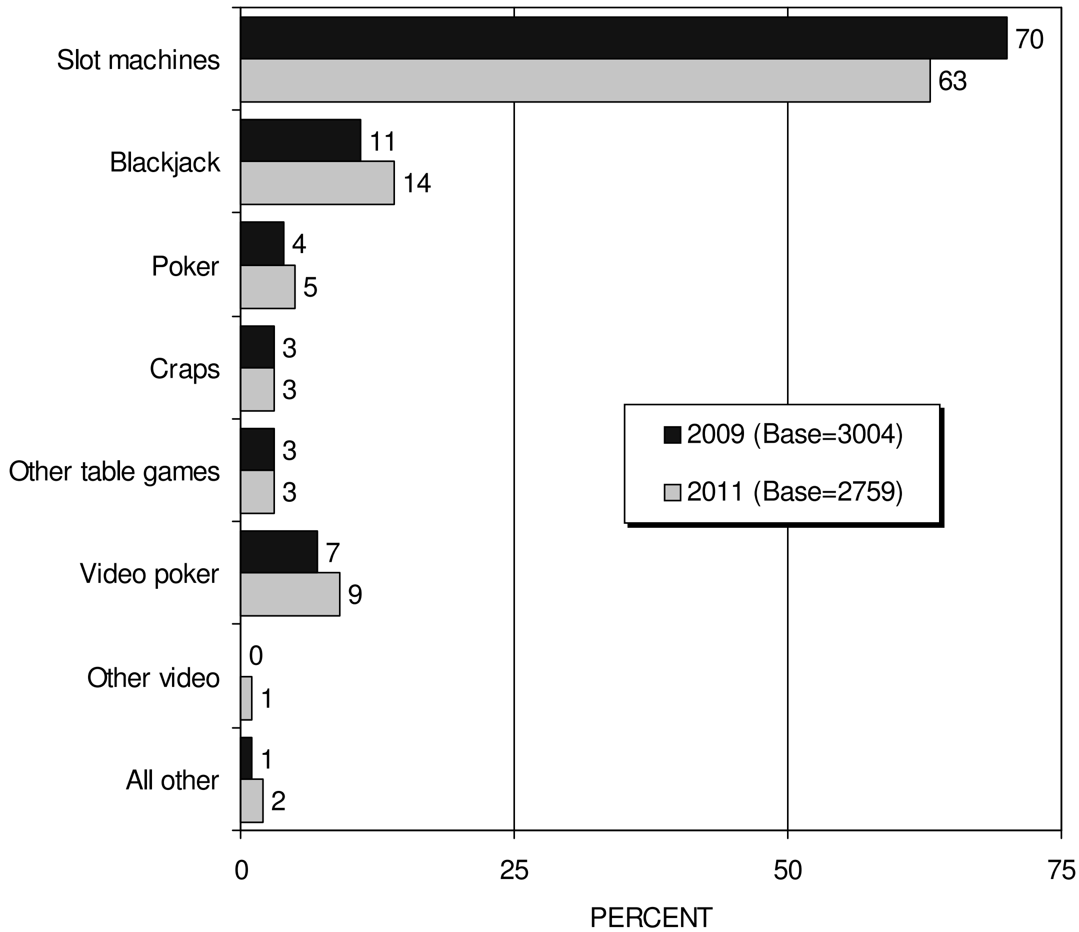
Some changes in 2012 data results may in part be due to updated methodology.

FIGURE 52
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



Among those who gambled while in Las Vegas, over one-half (59%) gambled for two hours or less, up significantly from 47% in 2008, 49% in 2009, 52% in 2010, and 54% last year (Figure 52). The average amount of time spent gambling per day was 2.6 hours, down significantly from 3.3 hours in 2008, 3.2 hours in 2009, and 2.9 hours each in 2010 and 2011.

FIGURE 53
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 63% of gamblers, down significantly from 70% in 2009. Fourteen percent (14%) said they played blackjack the most often (up significantly from 11% in 2009), followed by video poker (9%, up from 7% in 2009), poker (5%), and craps (3%) (Figure 53).

* This question is asked every other year and was not asked in 2008, 2010, or 2012.

FIGURE 54
Number Of Casinos Visited*

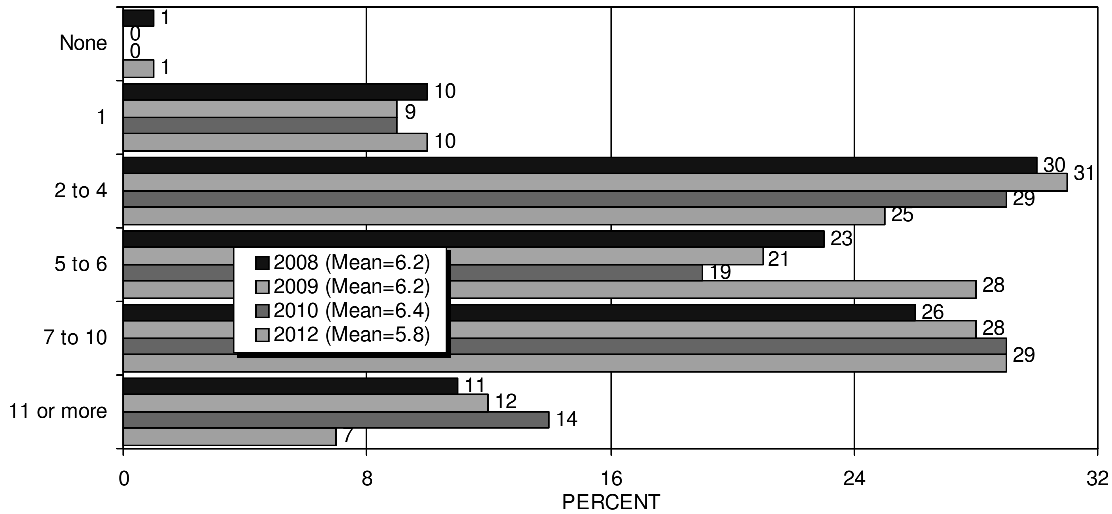
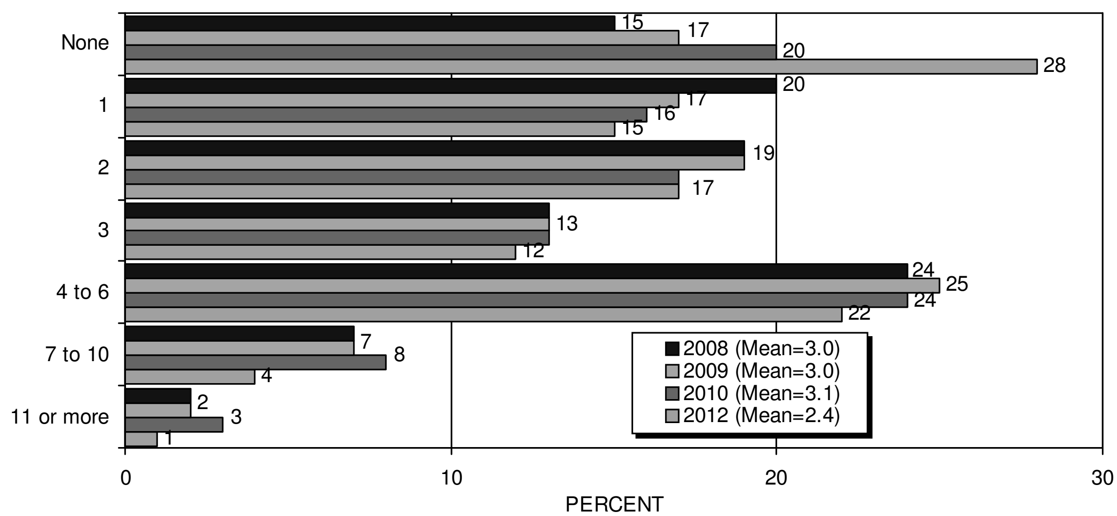


FIGURE 55
Number Of Casinos Where Gambled*



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 2012 was 5.8 (down significantly from prior years), and the number of casinos at which visitors gambled was 2.4 (also down from prior years) (Figures 54 and 55).

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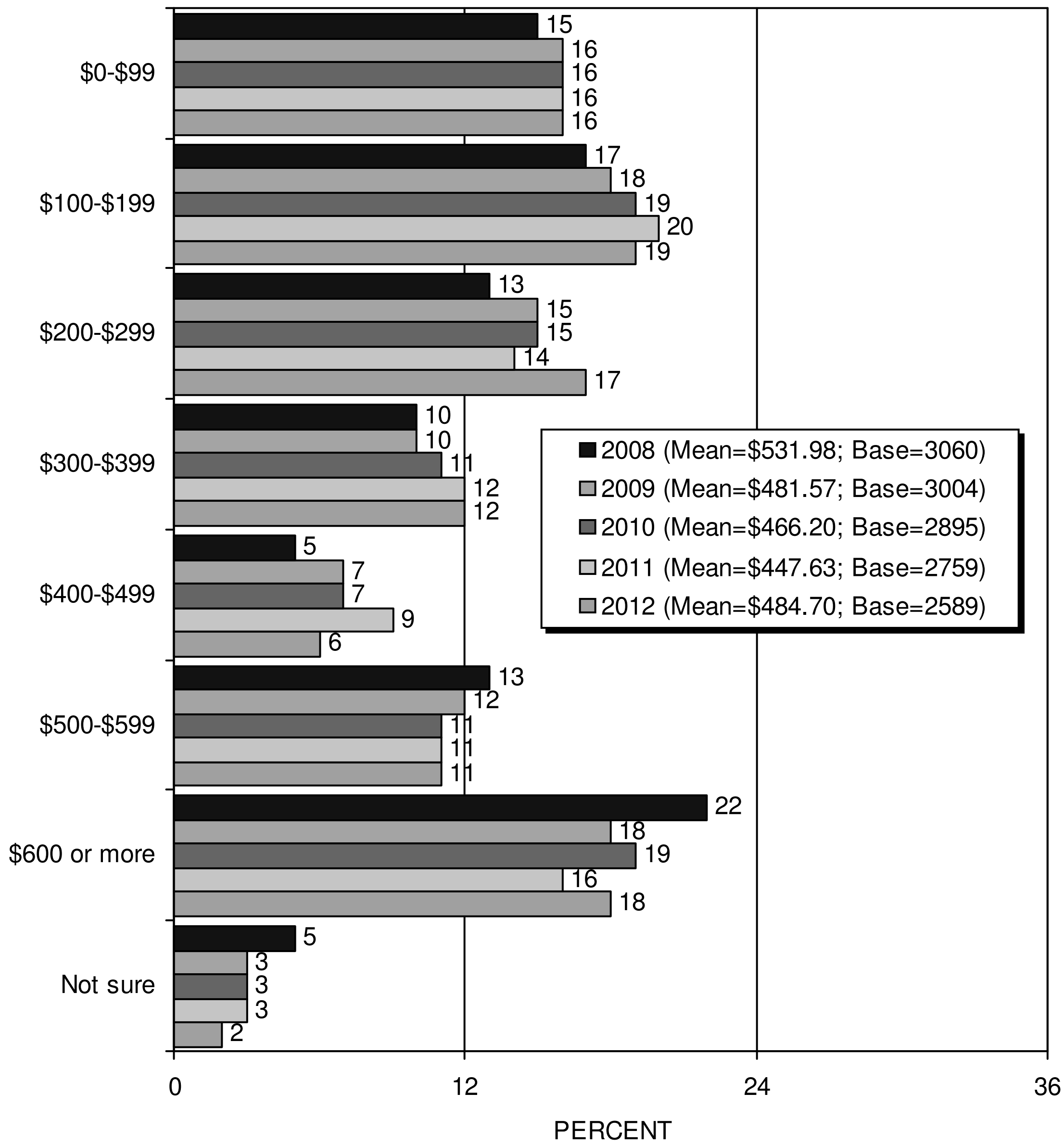
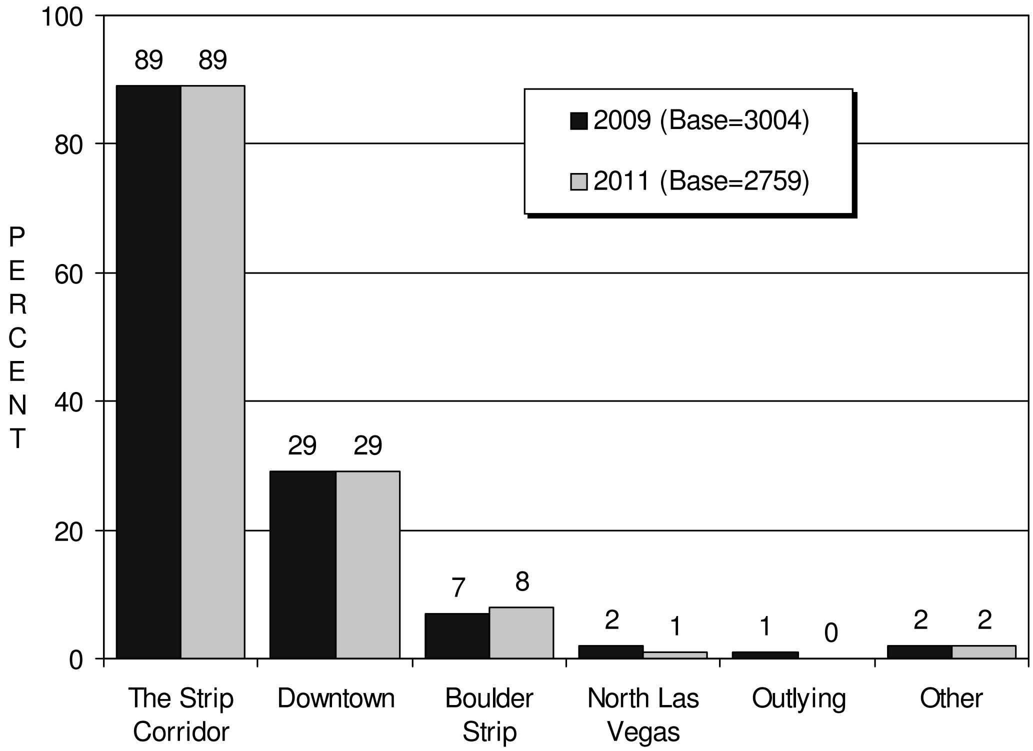
* These questions are asked every other year and were not asked in 2011. However, they were included in 2009.

FIGURE 56
Trip Gambling Budget
(Among Those Who Gambled)



Among those who gambled in 2012, the average gambling budget was $484.70, not significantly different from past years (Figure 56).

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



Most visitors (89%) gambled on the Strip Corridor† (Figure 57). Twenty-nine percent (29%) said they gambled Downtown, 8% gambled in the Boulder Strip area, 1% in North Las Vegas (down from 2% in 2009), and less than 1% in outlying areas.

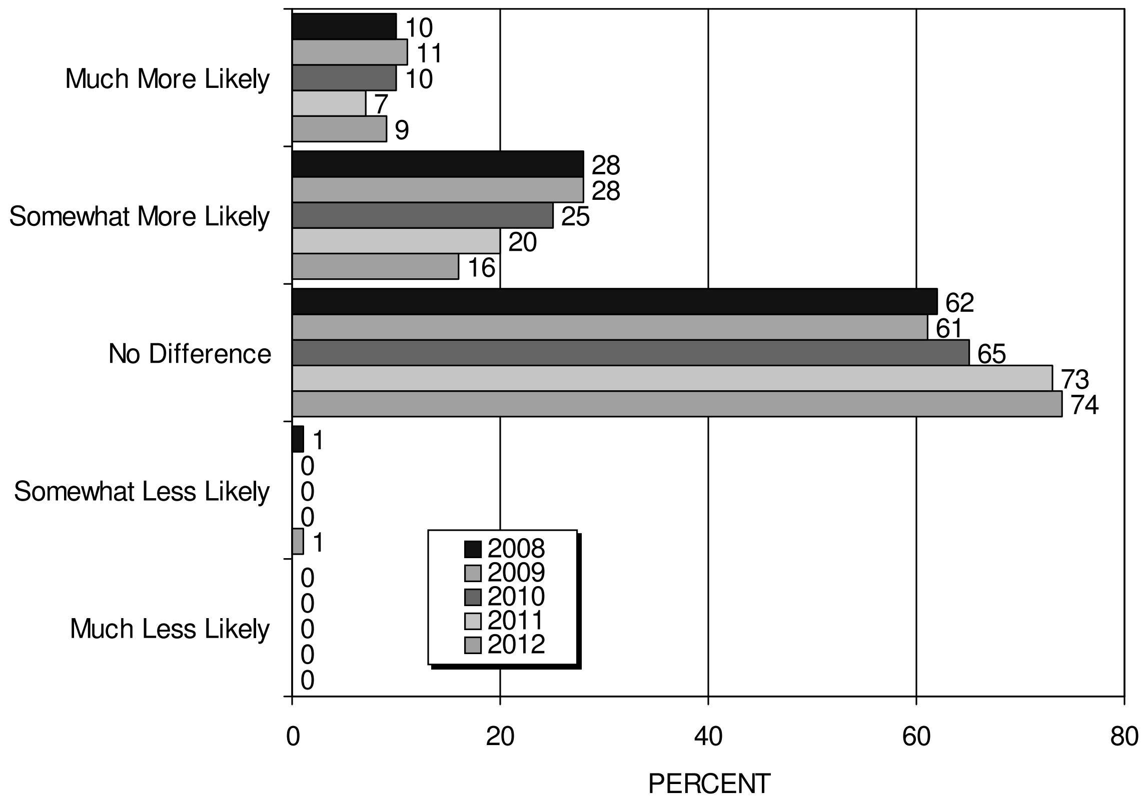
---

* This question is asked every other year and was not asked in 2008, 2010, or 2012.

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



All visitors to Las Vegas were asked the following:

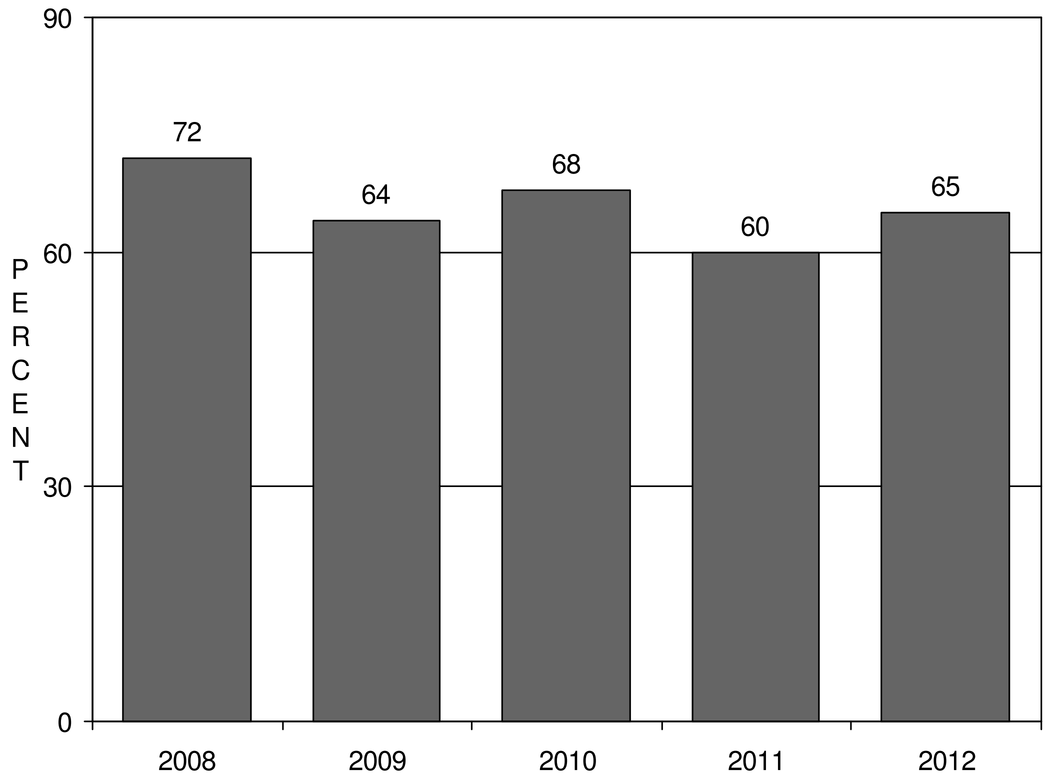
> "Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it not make a difference in your decision to visit Las Vegas?"

Twenty-five percent (25%) said they were either somewhat or much *more* likely to visit Las Vegas, down significantly from 38% in 2008, 39% in 2009, and 35% in 2010. Seventy-four percent (74%) said that having other places to gamble made no difference in their decision to visit Las Vegas, up from 62% in 2008, 61% in 2009, and 65% in 2010 (Figure 58). One percent (1%) said they were *less* likely to visit Las Vegas.

ENTERTAINMENT

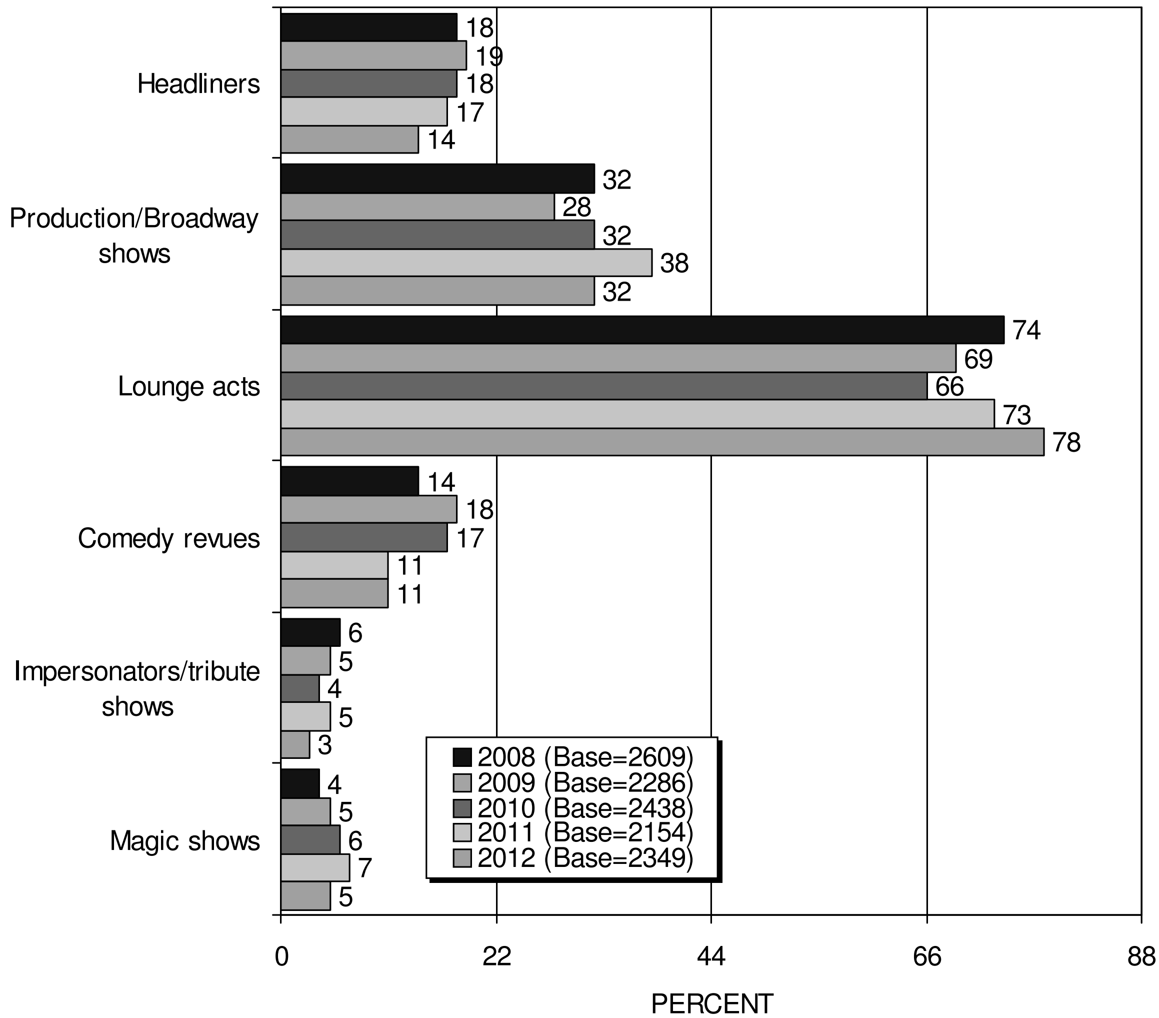
Sixty-five percent (65%) of visitors attended shows during their stay, down significantly from 72% in 2008, but up from 60% last year (Figure 59).

FIGURE 59
Entertainment Attendance*



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

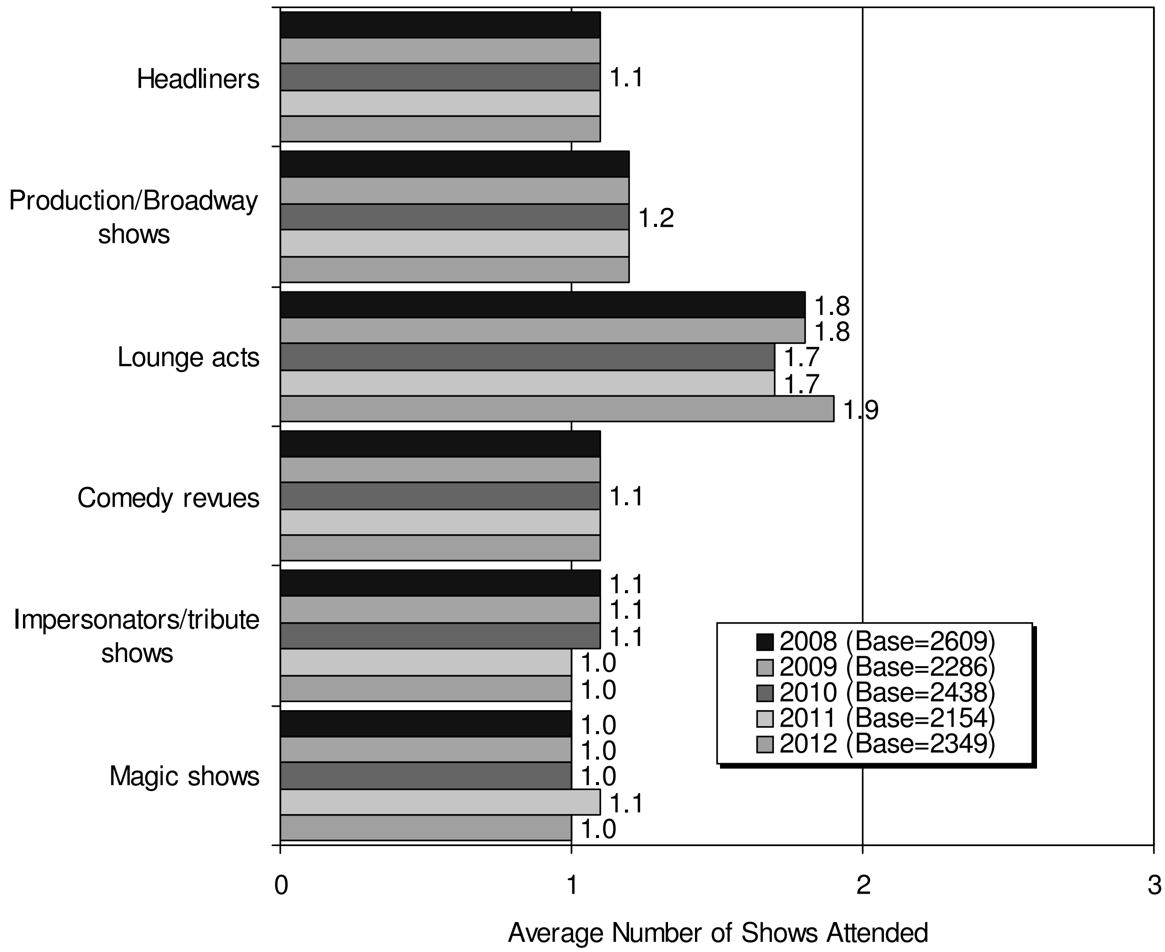
FIGURE 60
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



In 2012, 78% of visitors who saw a show in Las Vegas went to a lounge act, up significantly from past years (Figure 60). Thirty-two percent (32%) went to a production or Broadway-type show, up from 28% in 2009 but down from 38% last year. Fourteen percent (14%) saw a headliner (down from past years), 11% saw a comedy show (down from 2008 – 2010 results), 5% saw a magic show (down from 7% last year), and 3% saw an impersonator/tribute show (down from prior years).

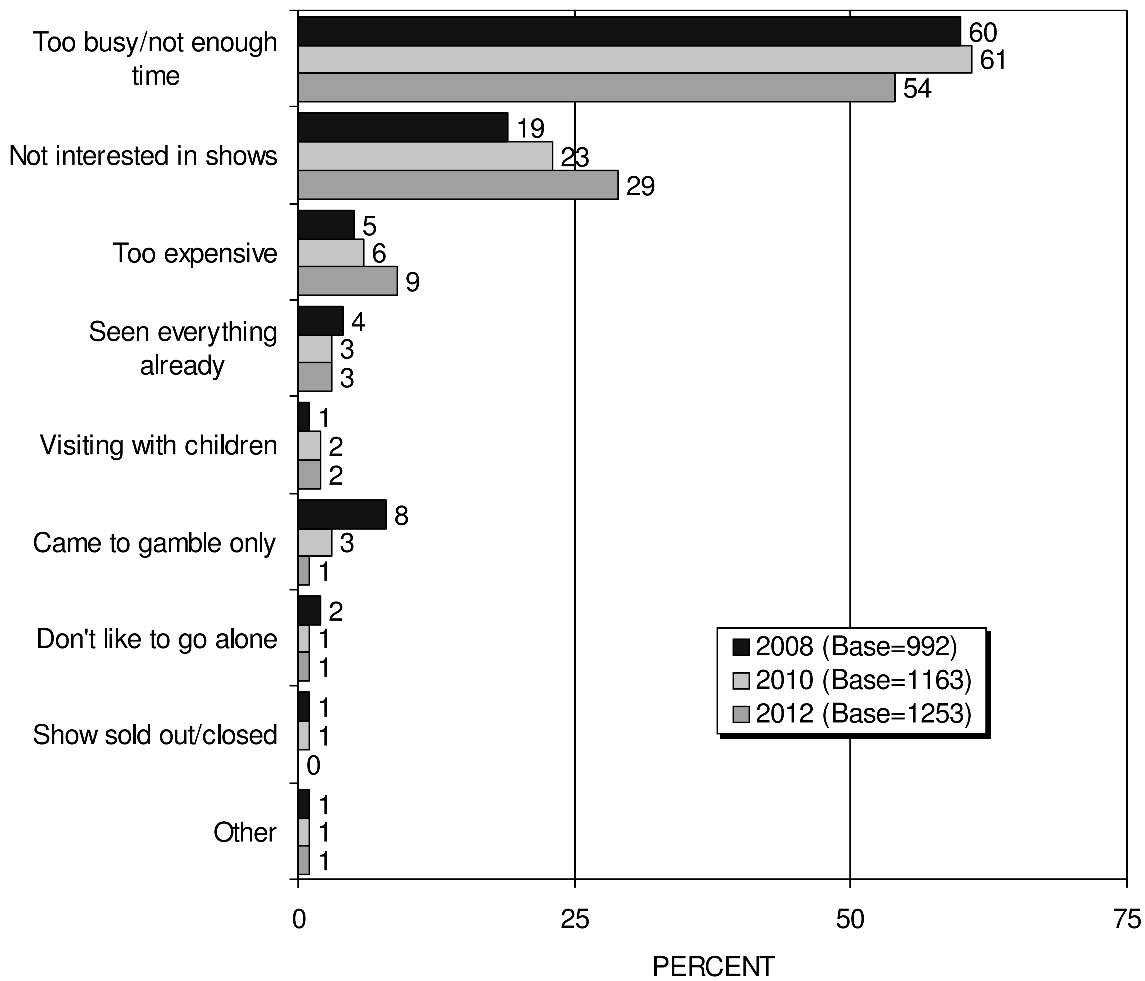
* Multiple responses were permitted.

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



Visitors who saw shows were asked how many shows of each type they saw (Figure 61). The average number of shows attended was highest for visitors who saw lounge acts (1.9, up from past years). Visitors saw an average of 1.2 production and Broadway-type shows, 1.1 headliners, 1.1 comedy revues, 1.0 impersonators/tribute shows, and 1.0 magic shows.

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). More than one-half (54%, down from 60% in 2008 and 61% in 2010) said it was because they were too busy. Twenty-nine percent (29%) said they were not interested in shows (up from 19% in 2008 and 23% in 2010), while 9% said the shows are too expensive (up from 5% in 2008 and 6% in 2010), 3% said they had already seen all the shows, 2% said they were visiting with children, and 1% each said they came to Las Vegas only to gamble (down from 8% in 2008 and 3% in 2010) or that they didn't like to go to shows alone.

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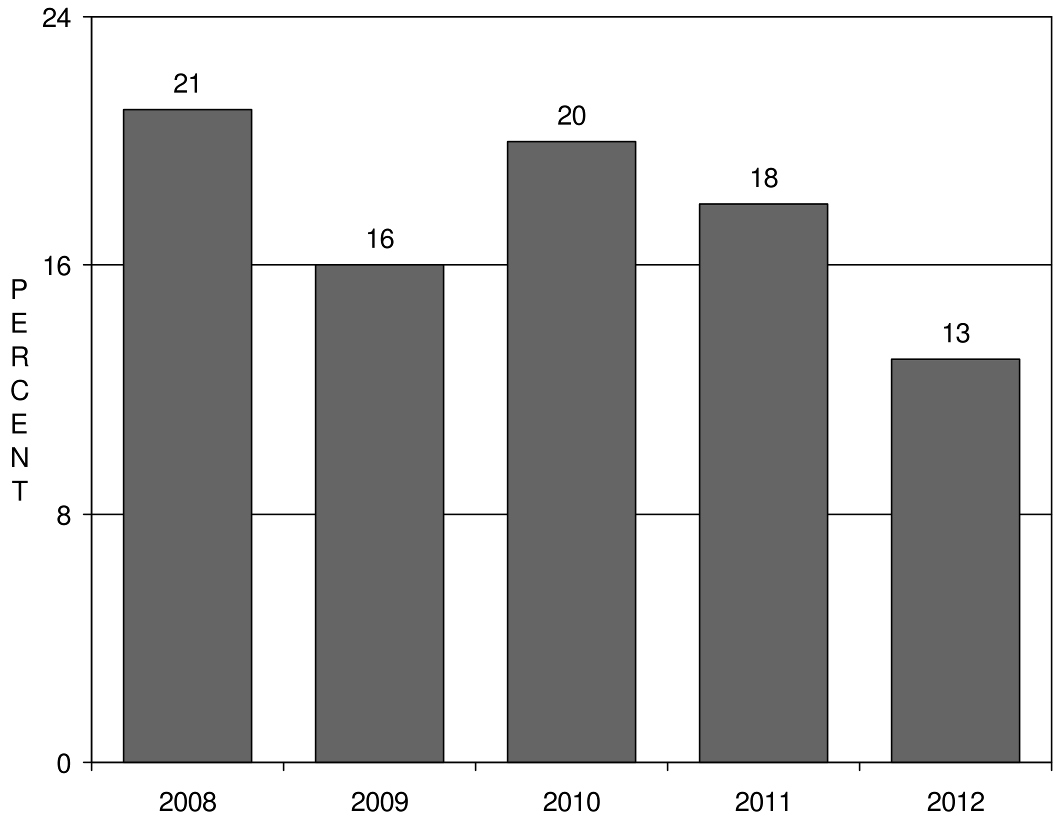
* This question is asked every other year and was not asked in 2007, 2009, or 2011.

FIGURE 63
Whether Has Been To Other Paid Attractions*



We asked all 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). Thirteen percent (13%) said yes, down from 21% in 2008, 16% in 2009, 20% in 2010, and 18% in 2011.

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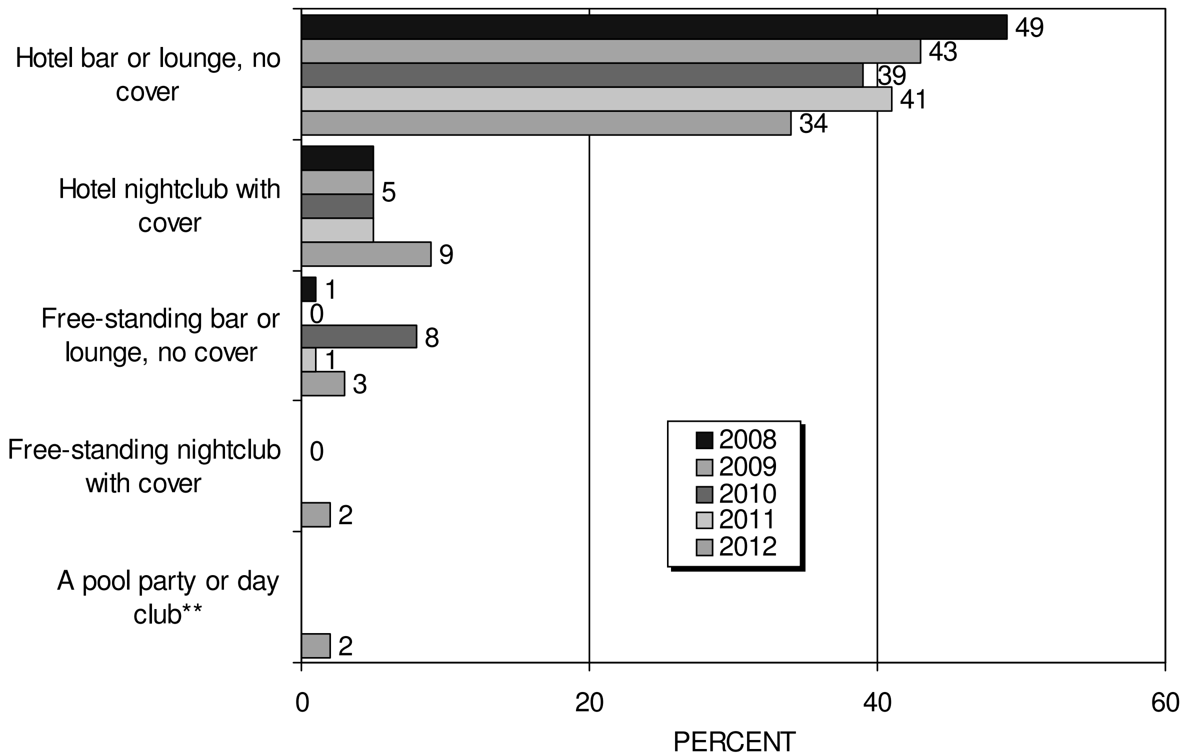
* Only "yes" responses are reported in this chart.

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



We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 64). One-third (34%) of visitors said they had been to a no-cover hotel bar or lounge, down significantly from past years. Nine percent (9%) had been to a hotel nightclub that charged a cover fee, up significantly from 2008 – 2011 results. Three percent (3%) had been to a no-cover free-standing bar or lounge (up from 1% or less in 2008, 2009 and last year, but down from 8% in 2010), while 2% had been to a free-standing nightclub that charged a cover fee, up from past years. Beginning in 2012, visitors were also asked if they had visited a pool party or day club, and 2% said they had.

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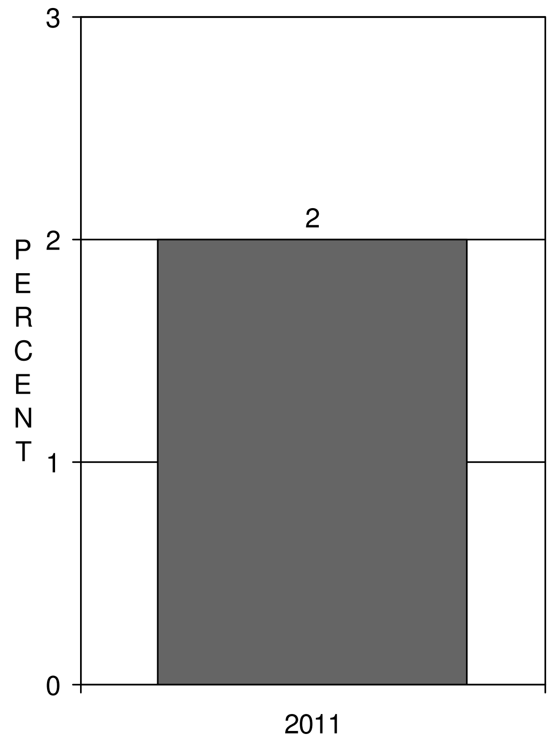
* Only "yes" responses are reported in this chart.

** Pool party option added in 2012.

FIGURE 65
Whether Played Golf*

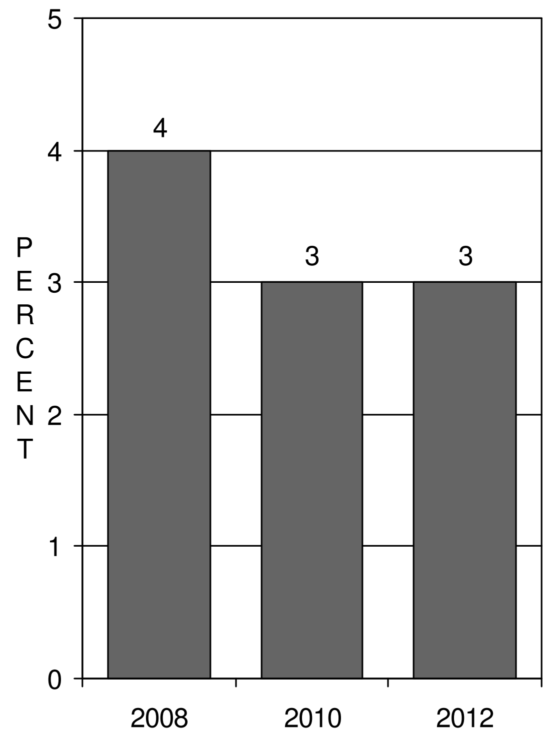


The proportion who said they had played golf during their 2011 visit to Las Vegas was 2% (Figure 65).

* Beginning in 2008, this question was not asked every year. It was not asked in 2008, 2009, 2010, or 2012.

Only “yes” responses are reported in this chart.

FIGURE 66
Whether Visited A Spa*



Beginning in 2008, visitors were asked if they had visited a spa during this trip to Las Vegas. In 2012, 3% said they had, down from 4% in 2008 (Figure 66).

* This question is asked every other year and was not asked in 2009 or 2011.

Only “yes” responses are reported in this chart.

ATTITUDINAL INFORMATION

Ninety-four percent (94%) of visitors said they were "very" satisfied with their visit to Las Vegas in 2012 (up significantly from 92% in 2011), while 5% were "somewhat" satisfied (down from 7% each in 2008 and 2011) (Figure 67).

FIGURE 67
Satisfaction With Visit

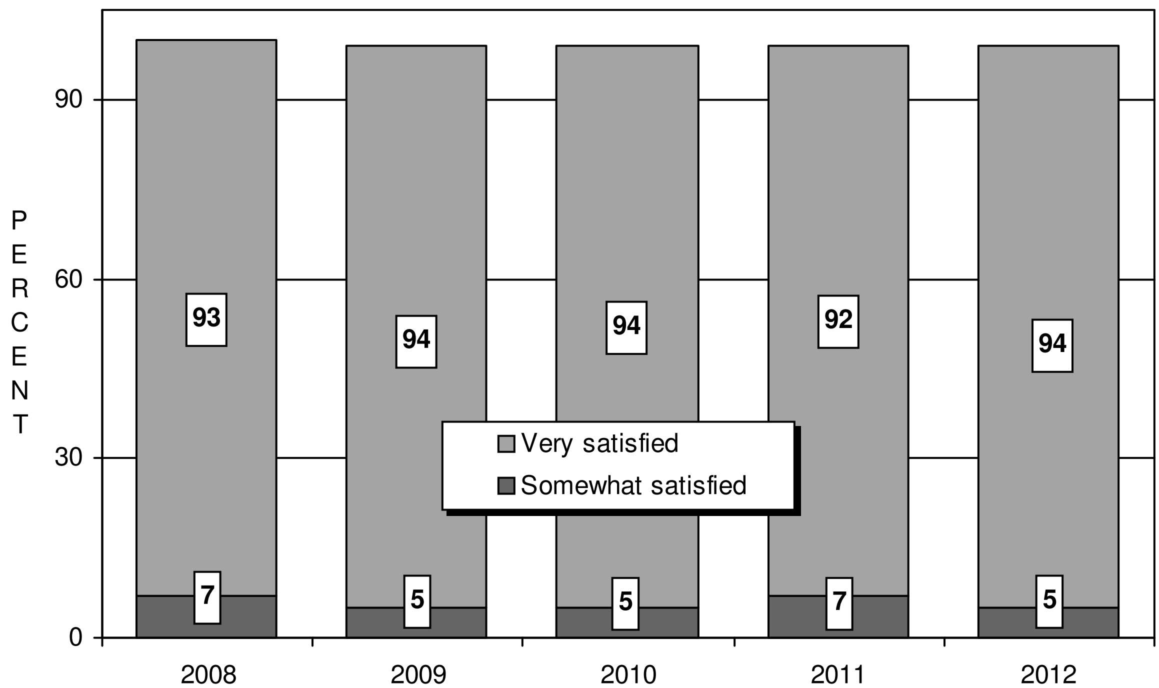
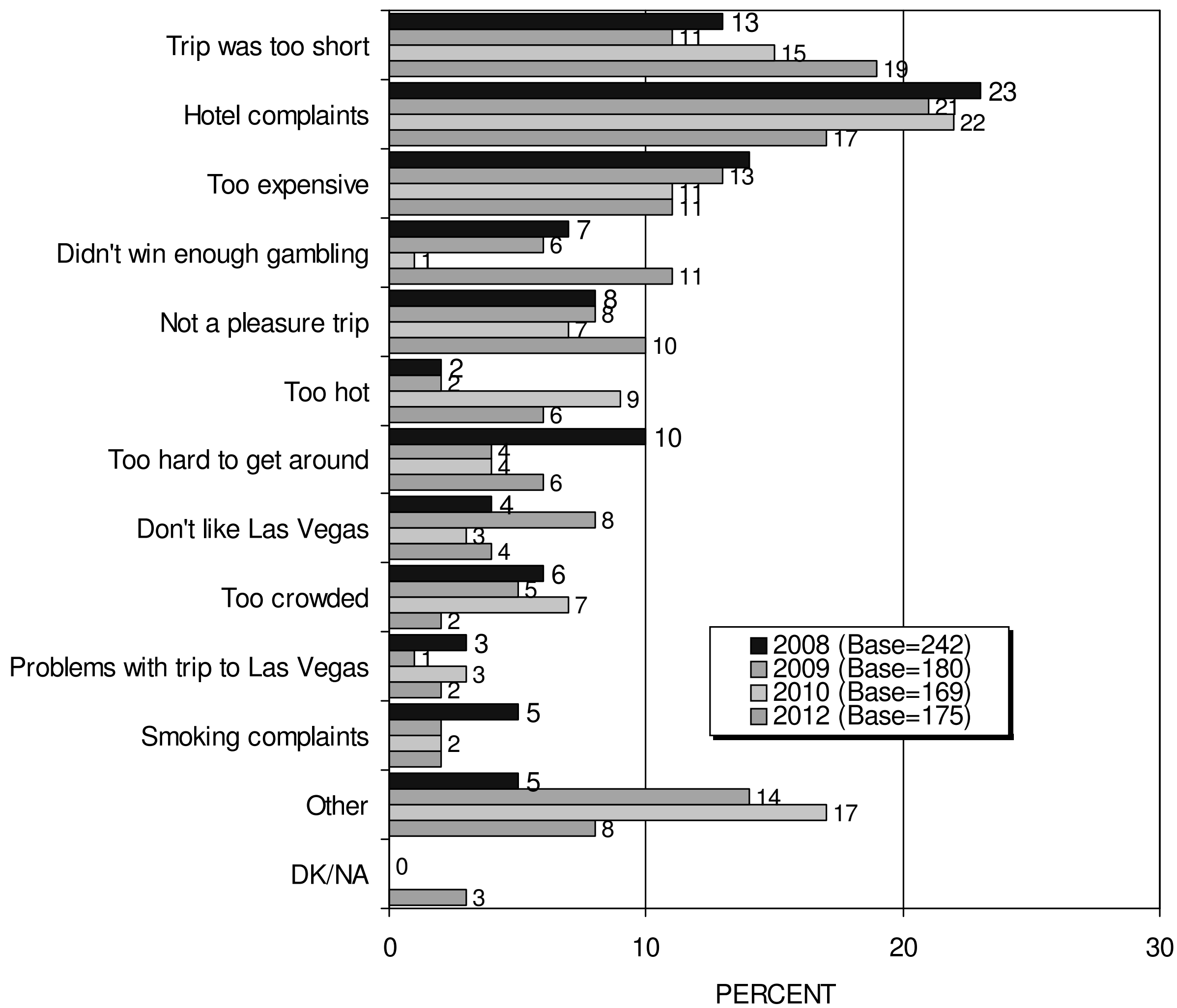


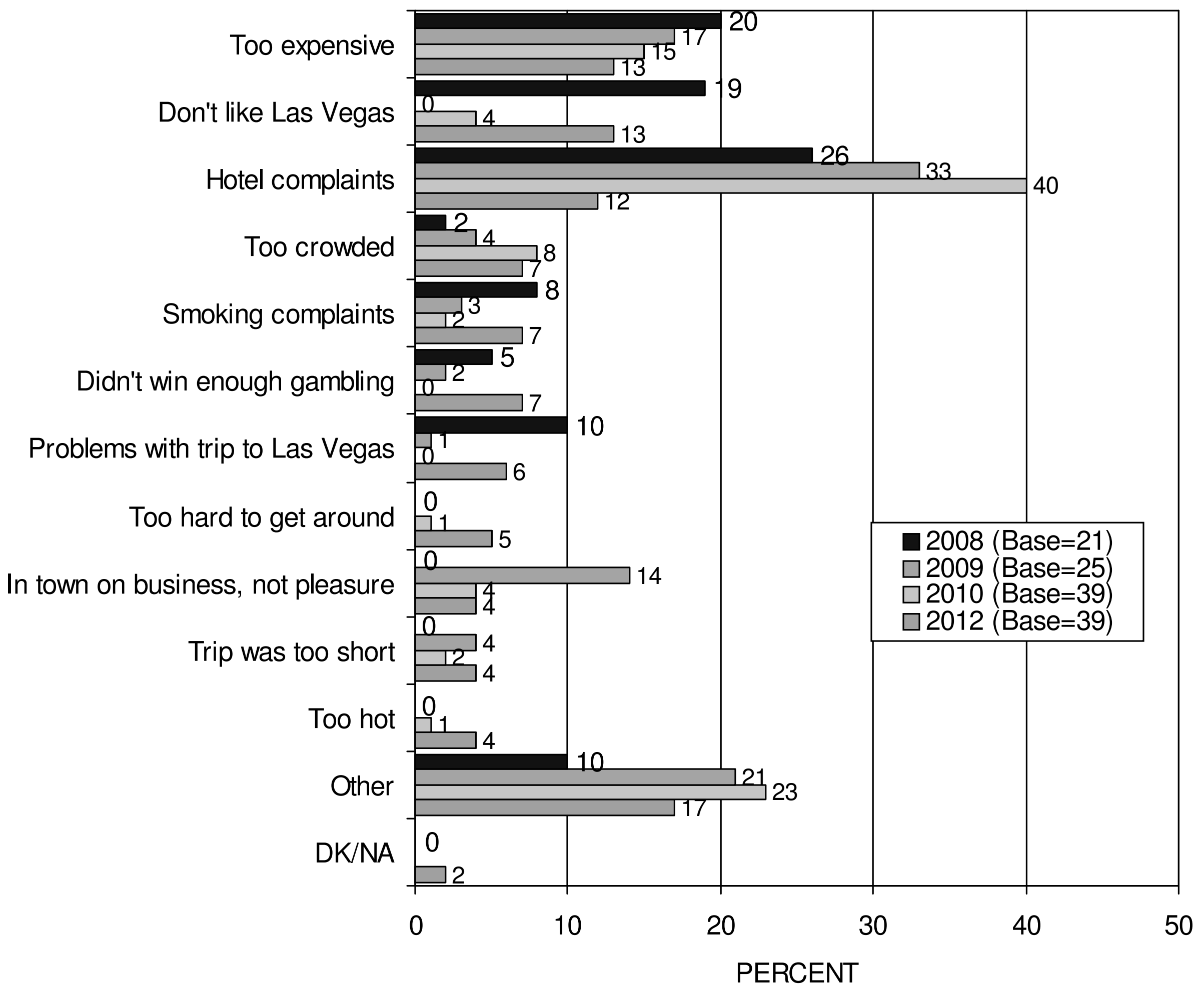
FIGURE 68
Why Not Completely Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied – Asked Every Other Year)



Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 68). Nineteen percent (19%) said their trip was too short, while 17% had complaints about their hotel. Among other reasons given were that they think Las Vegas is too expensive (11%), that they didn't win enough gambling (11%, up from 1% in 2010), that it was a business trip and not a pleasure trip (10%), too hot (6%, down from 9% in 2010), too hard to get around (6%), or that they simply don't like Las Vegas (4%).

* This question is asked every other year and was not asked in 2011. However, it was included in 2009.

FIGURE 69
Why Dissatisfied With Visit*
(Among Those Who Were Dissatisfied – Asked Every Other Year)



Very few visitors said they were dissatisfied with their visit to Las Vegas. These few dissatisfied visitors were asked to volunteer why they were not satisfied with their visit (Figure 69). The most frequently mentioned reasons for being dissatisfied were that they think Las Vegas is too expensive or that they just don't like Las Vegas (13% each). Twelve percent (12%) had hotel complaints, down from 40% in 2010.

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* This question is now asked every other year and was not asked in 2011. However, it was included in 2009.

Note very small base sizes for 2008 and 2009.

FIGURE 70
Likelihood of Returning to Las Vegas Next Year*

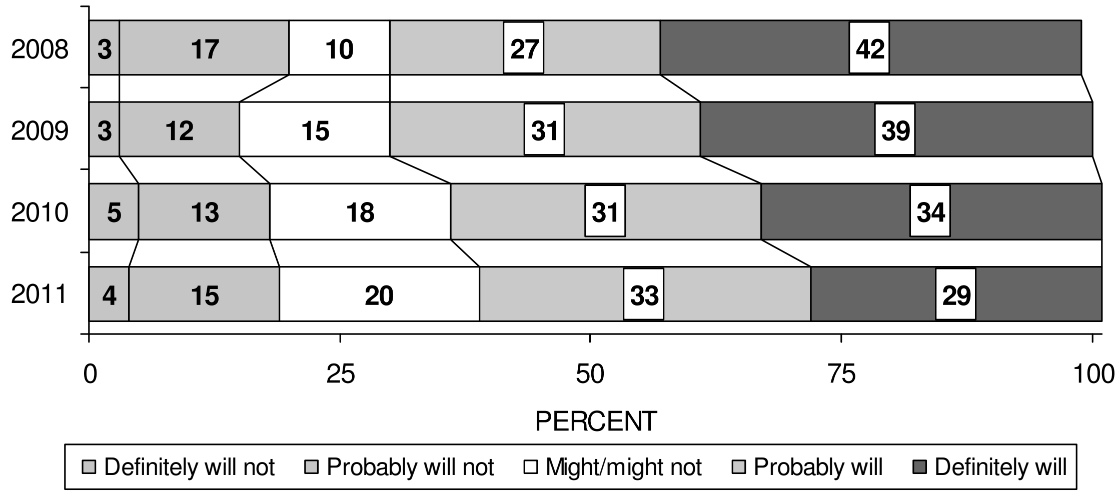
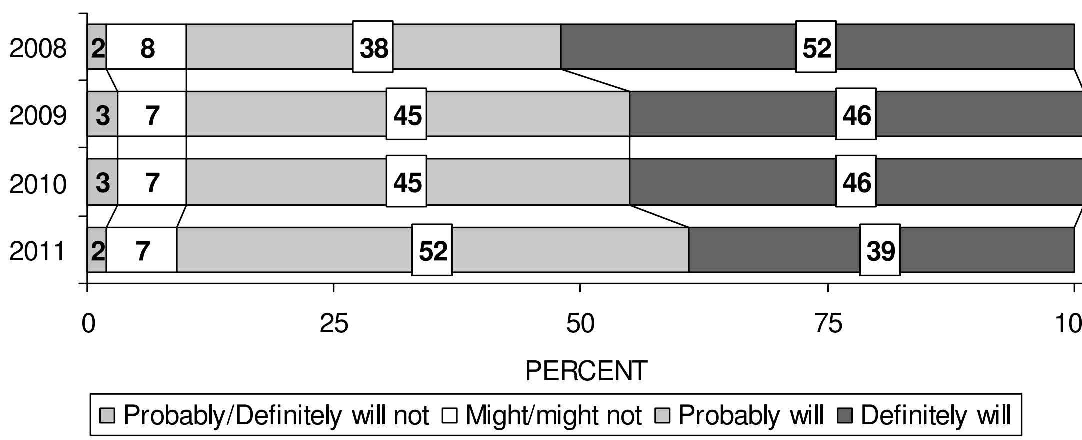


FIGURE 71
Likelihood of Recommending Las Vegas to Others*



Visitors were asked how likely they are to return to Las Vegas the following year (Figure 70). Twenty-nine percent (29%) said they "definitely" will return to Las Vegas next year (down from prior years), while 33% said they "probably" will return to Las Vegas (up from 27% in 2008). Visitors were also asked how likely they are to recommend Las Vegas to others (Figure 71). In 2011, 39% said they "definitely" will recommend Las Vegas (down from prior readings), while 52% said they "probably" will recommend Las Vegas (up from 2008-2010 results).

---

* This question was discontinued in 2012.

VISITOR DEMOGRAPHICS

As figures 72 and 73 show, visitors in 2012 were likely to be married (75%, down from 80% in 2008, 78% in 2009, and 79% in 2010), earning $40,000 or more (84%, up significantly from 81% in 2010), and employed (69%, up from past years). Nineteen percent (19%) were retired (down from 2008 – 2010). The proportion of visitors who were 40 years old or older was 58% (down from past years), and the average age was 44.8 (down significantly from past results).

FIGURE 72
VISITOR DEMOGRAPHICS

	2008	2009	2010	2011	2012
GENDER					
Male	51%	50%	50%	51%	51%
Female	49	50	50	49	49
MARITAL STATUS					
Married	80	78	79	77	75
Single	13	15	14	15	18
Separated/Divorced	5	5	5	5	5
Widowed	2	3	2	3	2
EMPLOYMENT					
Employed	66	65	66	66	69
Unemployed	1	2	2	1	2
Student	2	2	3	3	5
Retired	28	28	27	25	19
Homemaker	4	3	3	4	5
EDUCATION					
High school or less	28	25	23	20	15
Some college	21	24	24	25	28
College graduate	45	47	48	50	52
Trade/vocational school	7	4	5	5	5
AGE					
21 to 29	10	11	10	12	19
30 to 39	15	16	19	18	24
40 to 49	21	21	23	22	21
50 to 59	22	19	19	19	16
60 to 64	11	10	9	9	6
65 or older	22	22	20	20	15
MEAN	50.6	50.0	49.2	49.0	44.8
BASE	(3601)	(3600)	(3601)	(3600)	(3602)

More than one-half (54%) of visitors were from the western United States, with the bulk of them coming from California (33%, up from 2008 – 2011) (Figure 73). Seventeen percent (17%) of visitors were from foreign countries, up significantly from 14% in 2009.

FIGURE 73

VISITOR DEMOGRAPHICS

	2008	2009	2010	2011	2012
ETHNICITY					
White	90%	88%	86%	86%	75%
African American/Black	4	4	5	4	5
Asian/Asian American	2	2	3	3	9
Hispanic/Latino	4	5	6	7	8
Other	0	1	1	1	3
HOUSEHOLD INCOME					
Less than $20,000	1	1	1	1	3
$20,000 to $39,999	5	6	7	3	6
$40,000 to $59,999	18	20	17	14	17
$60,000 to $79,999	24	25	24	24	26
$80,000 to $99,999	19	18	16	17	15
$100,000 or more	22	20	24	32	26
Not sure/no answer	12	9	10	10	7
VISITOR ORIGIN					
U.S.A.	85	86	82	84	83
Eastern states*	8	7	6	6	7
Southern states†	13	11	11	12	11
Midwestern states‡	12	12	12	11	11
Western states§	52	55	54	55	54
California	28	31	30	31	33
Southern California	24	26	26	26	26
Northern California	4	5	4	5	7
Arizona	9	10	7	9	6
Other Western states	15	14	16	15	15
Foreign	15	14	18	16	17
BASE	(3601)	(3600)	(3601)	(3600)	(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.

APPENDIX:

Aggregate Results for Calendar Year 2012

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 51%
FEMALE 49

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 16%	**SKIP TO Q7 ON PAGE 2**
VISITED BEFORE............84	**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 ....22%
2-3..34
4-5..16
6-10..17
OVER 10...11
<u>5.8</u> MEAN
<u>3.0</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 ....73%
2-3..20
4-5..4
6 OR MORE...................................3
<u>1.6</u> MEAN
<u>1.0</u> MEDIAN

7. **(ASK OF ALL RESPONDENTS.)** What was the *primary purpose* of *THIS* trip to Las Vegas?

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW 8%
TO ATTEND A CORPORATE MEETING 1
TO GAMBLE 8
INCENTIVE TRAVEL PROGRAM 0
VACATION/PLEASURE 47
VISIT FRIENDS/RELATIVES 14
TO ATTEND A SPECIAL EVENT 7
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 1%
OTHER BUSINESS PURPOSES 7
JUST PASSING THROUGH 3
WEDDING/TO GET MARRIED 4
SOME OTHER REASON 1
NOT SURE/DK 0
REFUSED/NA 0

---

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

YES 9%
NO 91
NOT SURE/DK 0
REFUSED/NA 0

9. 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=326)

MORE INTERESTED 46%
LESS INTERESTED 1
NO DIFFERENCE 52
NOT SURE/DK 0
REFUSED/NA 1

10. Did you bring a spouse, family member, or friend with you who did NOT attend or work at a convention, trade show, or corporate meeting?

(N=326)

YES 36%
NO 63
DK/NA 1

11. Did you travel to Las Vegas by...

Air 43%
Bus (NET) 4
(IF "YES" ASK, "Do you mean...":)
Regularly scheduled bus service like Greyhound 1
Or a chartered or escorted bus service or bus tour 3
Automobile 50
Truck 1
Motorcycle 0
Recreational Vehicle (RV) 2

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

A.	Your own vehicle	47%
B.	Rental car	13
C.	Limousine	2
D.	Bus	15
E.	Hotel/motel shuttle	14
H	Monorail	7
G.	Taxi	29
	WALKED	48
	OTHER	3

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	3
7-14 DAYS BEFORE	15
15-30 DAYS BEFORE	33
31-60 DAYS BEFORE	23
61-90 DAYS BEFORE	9
MORE THAN 90 DAYS BEFORE	14
NOT SURE/DK	0
REFUSED/NA	0

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

YES	13%	**ASK Q15**
NO	87	**SKIP TO Q16**
NOT SURE/DK	0	
REFUSED/NA	0	

15. Did the travel agent... **(READ LIST)** (N=484)

Influence your decision to visit Las Vegas?	4%
Influence your choice of accommodations?	72
"Book" your accommodations?	82
"Book" your transportation?	92

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

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

17. Did you use the Internet to book your transportation? (N=2146)

YES	47%	**ASK Q18**
NO	52	**SKIP TO Q19**
NOT SURE/DK	0	
REFUSED/NA	1	

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

(N=1012)

a.	AOL (AMERICA ONLINE)	1%
b.	CHEAPTICKETS	2
c.	EXPEDIA.COM	11
d.	HOTWIRE.COM	2
e.	MAPQUEST.COM	0
f.	ORBITZ	3
g.	PRICELINE.COM	5
h.	TRAVEL.COM	0
i.	TRAVELOCITY	7
j.	YAHOO	0
k.	AIRLINE WEBSITE (ANY)	64
l.	OTHER	5
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=2146)

a.	Influenced your decision to visit Las Vegas?	3%
b.	Influenced your choice of accommodations?	54

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	36%	**SKIP TO Q22**
NO	64	**ASK Q21**
NOT SURE/DK	0	**SKIP TO Q22**
REFUSED/NA	0	

21. **(ASK ONLY IF "NO" IN Q20.)** What is the MAIN REASON why you did not visit the Downtown area? **(ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**
(N=2310)

NOT INTERESTED/ NO REASON TO............................56%

NOT ENOUGH TIME 21

UNFAMILIAR WITH DOWNTOWN..................................13

INCONVENIENT/OUT OF THE WAY 3

ONLY INTERESTED IN STRIP 3

DON'T LIKE DOWNTOWN/ IT'S A BAD AREA 2

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. INTERVIEWER: 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.)**

TYPE OF LODGING
(ALL RESPONDENTS)

HOTEL...92%
MOTEL 4
RV PARK...2
FRIENDS/RELATIVES 2
DAYTRIP/NO LODGING 0

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)

(N=3591)

HOTEL...92%
MOTEL 4
RV PARK...2
FRIENDS/RELATIVES 2

LOCATION OF LODGING
(ALL RESPONDENTS)

STRIP CORRIDOR.................................77%
  ON THE STRIP.................................60
  JUST OFF THE STRIP.....................17
DOWNTOWN 6
BOULDER STRIP....................................3
OUTLYING AREAS 12
OTHER 2

LOCATION OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT) (N=3591)

STRIP CORRIDOR.................................77%
  ON THE STRIP.................................60
  JUST OFF THE STRIP.....................17
DOWNTOWN 6
BOULDER STRIP....................................3
OUTLYING AREAS 12
OTHER 2

23. At what point in your planning did you decide where you would stay? (N=3591)

BEFORE LEAVING HOME 93%

WHILE EN ROUTE TO LAS VEGAS................................ 3

AFTER ARRIVAL........................ 3

NOT SURE/DK 0

REFUSED/NA............................. 0

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.)**

(N=3475)

Booked by phone, calling the hotel, motel, or RV park directly.........35% Booked through a travel agent (either in person or by phone) ......11 Booked by phone but not by calling the hotel directly and not through a travel agent 2	**SKIP TO Q26**
Booked at a website on the Internet 41	**ASK Q25**
Booked in person at the hotel, motel, or RV park.................................3 The trip was a gift, prize, or incentive, so the accommodations were booked for you........2 Not sure because someone else in your party booked the hotel and you don't know how they did it ....6 OTHER (SPECIFY:) ....0 REFUSED/NA 0	**SKIP TO Q26**

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

(N=1409)

a. HOTEL WEBSITE (ANY).............32%
b. HOTELS.COM 14
c. EXPEDIA.COM 15
d. LAS VEGAS.COM 8
e. TRAVELOCITY 6
f. AIRLINE WEBSITE........................ 4
g. ORBITZ... 3
h. CHEAPTICKETS. 0
i. PRICELINE.COM........................... 6
j. VEGAS.COM 4
k. YAHOO 0
l. HOTWIRE 4
m. OTHER 5
n. 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=3475)

SAME DAY...............................3%

1-3 DAYS BEFORE 3

4-6 DAYS BEFORE 3

7-14 DAYS BEFORE 22

15-30 DAYS BEFORE 44

31-60 DAYS BEFORE 14

61-90 DAYS BEFORE 4

MORE THAN 90 DAYS BEFORE........................6

NOT SURE/DK.........................0

REFUSED/NA 0

27. Including yourself, how many people stayed in your room? (N=3447)

ONE 13%
TWO 71
THREE 7
FOUR 7
FIVE 2
SIX OR MORE 0
REFUSED/NA 0
2.1 MEAN
2.0 MEDIAN

28. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=3398)

HOTEL/TRANSPORTATION PACKAGE DEAL .... 13% HOTEL/AMENITIES PACKAGE DEAL .... 1 TOUR/ TRAVEL GROUP 1	**ASK Q29**
CONVENTION GROUP/ COMPANY MEETING ...... 4 CASINO RATE .... 7 REGULAR FULL-PRICE ROOM RATE 32	**SKIP TO Q31**
CASINO COMPLIMENTARY 14	**SKIP TO Q33**
ANOTHER RATE 29	**SKIP TO Q31**

29. What was the total PER PERSON cost of your package? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS.)** (N=478)

$0-$99 .... 1%
$100-$199 4
$200-$299 5
$300-$399 10
$400-$499 15
$500-$999 40
$1000 OR MORE 21
NOT SURE/REFUSED 4
$743.65 MEAN
$600.00 MEDIAN

30. Where did you first hear about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=478)

NEWSPAPER 1%
TELEVISION 0
TRAVEL AGENT 47
WORD OF MOUTH 5
OFFER RECEIVED IN THE MAIL 1
E-MAIL OFFER 0
INTERNET AD 18
ANY WEBSITE 24
RESERVATION AGENT/ CALL CENTER 0
OTHER 2
NOT SURE/NO ANSWER 1

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=2435)

$0-$35 .... 5%
$36-$50 17
$51-$100 45
$101 OR MORE 29
NOT SURE/REFUSED 4
$93.13 MEAN
$80.00 MEDIAN

32. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=2435)

NEWSPAPER.................................. 0%
TELEVISION.................................. 0
RADIO 0
TRAVEL AGENT 6
WORD-OF-MOUTH........................ 10
OFFER RECEIVED IN THE MAIL................................... 3
BROCHURE 1
E-MAIL OFFER............................... 2
INTERNET AD (POP-UP OR BANNER AD) 11
ANY WEBSITE 39
OUTDOOR BILLBOARD 0
RESERVATION AGENT/ CALL CENTER 26
OTHER 1
NOT SURE/DK 2

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...11%
2...66
3...6
4...11
5 OR MORE 6
2.4 MEAN
2.0 MEDIAN

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

YES 11%
NO 89

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

0 .... 0%
1 7
2 28
3 29
4 19
5 OR MORE........................... 18
3.3 MEAN
3.0 MEDIAN

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

1 .... 0%
2 7
3 28
4 29
5 19
6 OR MORE........................... 18
4.3 MEAN
4.0 MEDIAN

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

SUNDAY 14%
MONDAY 15
TUESDAY 12
WEDNESDAY.........................13
THURSDAY 15
FRIDAY 19
SATURDAY............................13

38. During your stay in Las Vegas, how many casinos or casino-hotel properties did you visit? If you are staying at a casino-hotel, please include it in your count.

0 ....1%
1 10
2 7
3 8
4 10
5 14
6 14
7 TO 10....................................29
MORE THAN 10 7
5.8 MEAN
6.0 MEDIAN

39. At how many of these casinos or casino-hotel properties did you gamble?

0 .... 28%
1 15
2 17
3 12
4 10
5 7
6 5
7 TO 10 4
MORE THAN 10 1
2.4 MEAN
2.0 MEDIAN

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

YES 72%	**ASK Q41**
NO 28	**SKIP TO Q44**

41. At what point in your planning did you decide where you would gamble? (N=2589)

BEFORE LEAVING HOME 38%
WHILE EN ROUTE TO LAS VEGAS 2
AFTER ARRIVAL 60
NOT SURE/DK 0
REFUSED/NA 0

42. 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=2589)

2 OR LESS 59%
LESS THAN 1 HOUR 15
ONE HOUR 21
TWO HOURS 22
3 TO 4 24
5 TO 6 12
7 TO 8 5
9 TO 10 1
MORE THAN 10 0
2.6 MEAN
2.0 MEDIAN

43. 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=2589)

$0-$99 .... 16%
$100-$199 19
$200-$299 17
$300-$399 12
$400-$499 6
$500-$599 11
$600 OR MORE 18
NOT SURE/REFUSED 2
$484.70 MEAN
$250.00 MEDIAN

44. **(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 9%
4 -SOMEWHAT MORE LIKELY 16
3 -NO DIFFERENCE 74
2 -SOMEWHAT LESS LIKELY 1
1 -MUCH LESS LIKELY 0
NOT SURE/DK 0
REFUSED/NA 0
3.3 MEAN
3.0 MEDIAN

45. 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.)**

46. **(ASK FOR EVERY "YES" IN Q45.)** And how many **(INSERT EACH TYPE MENTIONED IN Q45)** have you seen during this trip? **(RECORD TWO-DIGIT NUMBER IN APPROPRIATE BLANKS.)**

	Q45				Q46	
	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.)	9%	91%	0%	0%	1.1	(N=324)
B. Broadway/production shows	21	79	0	0	1.2	(N=752)
C. Comedy shows or revues (for example, Improv, Comedy Stop, etc.)	7	93	0	0	1.1	(N=256)
D. Lounge acts or other kinds of free entertainment provided at a location other than the "main" show room	51	49	0	0	1.9	(N=1822)

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

YES (HAS *NOT* SEEN ANY SHOWS)	NO (HAS SEEN SHOWS)
35%	65%

48. At what point in your planning did you decide which shows you would see? (N=2349)

BEFORE LEAVING HOME 31%
WHILE EN ROUTE TO LAS VEGAS 2
AFTER ARRIVAL 67
NOT SURE/DK 0
REFUSED/NA 0

49. **(ASK THOSE WHO DID NOT GO TO SHOWS:)** What was the *main* reason you didn't go to *any* shows, revues, or acts during your stay in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)** (N=1253)

TOO BUSY/NO TIME 54%
NOT INTERESTED 29
CAME TO GAMBLE 1
ALREADY SAW SHOWS 3
TOO EXPENSIVE 9
DON'T LIKE TO GO ALONE 1
HAVE CHILDREN WITH US 2
SHOWS SOLD OUT OR CLOSED 0
INCONVENIENT 1

50. 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 13%
NO 87
NOT SURE/DK 0
REFUSED/NA 0

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

A. A nightclub in a hotel with a cover charge? 9%
B. A free-standing nightclub with a cover charge? 2
C. A bar or lounge in a hotel without a cover charge? 34
D. Any free-standing bar or lounge without a cover charge? 3
E. A pool party or day club? 2

52. Will you (or did you) visit other areas of Nevada or the surrounding area (for example, the Grand Canyon and Death Valley), either before or after this visit to Las Vegas?

YES 14%
NO 86

53. **(ASK THOSE WHO VISITED NEARBY PLACES:)** On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=509)

Hoover Dam	57%
Grand Canyon	61
Lake Mead	21
Laughlin	7
Zion National Park	10
Death Valley	7
Bryce Canyon	10
Red Rock Canyon	5
Primm. NV	2
Mt. Charleston/Lee Canyon	7
Valley of Fire	6
Mesquite, NV	1
All other responses	2

54. Did you visit a spa while in Las Vegas? By spa we mean a place that typically offers hair, skin, and body care, facials, massage, manicures, pedicures, etc.?

YES	3%
NO	97

55. 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.)**

$265.11 MEAN (INCLUDING $0)
$266.13 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.)**

$57.77 MEAN (INCLUDING $0)
$94.22 MEAN (EXCLUDING $0)

56. 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)	$149.29	MEAN (INCLUDING $0)
	$259.00	MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)	$42.89	MEAN (INCLUDING $0)
	$123.43	MEAN (EXCLUDING $0)
C. Sightseeing	$9.63	MEAN (INCLUDING $0)
	$120.85	MEAN (EXCLUDING $0)
X. Other	$5.48	MEAN (INCLUDING $0)
	$238.64	MEAN (EXCLUDING $0)

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

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

Very satisfied....94%
Somewhat satisfied....5
Somewhat dissatisfied....1
Very dissatisfied....0

DO NOT READ
NOT SURE/DK....0
REFUSED/NA....0

58. **(ASK OF THOSE WHO WERE "SOMEWHAT" SATISFIED:)** You just said you were *somewhat* satisfied with your overall experience in Las Vegas. What is the *MAIN* reason that keeps you from saying you were *very* satisfied? (N=175)

Hotel complaints....17%
Trip was too short....19
Too expensive....11
Too hot....6
Bad weather (other than heat)....1
Here for business, not pleasure/ not enough free time....10
Too crowded....2
Too hard to get around....6
Don't like Las Vegas....4
Problems with trip to Las Vegas....2
Smoking complaints....2
Gambling complaints....11
Other....7
Don't Know/No Answer....3

59. **(ASK OF THOSE WHO WERE DISSATISFIED:)** What is the *MAIN* reason you were dissatisfied with your overall experience in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)**

(N=39)

Hotel complaints....12%
Too expensive....13
Problems with trip to Las Vegas....6
Too crowded....7
Someone in party got sick....1
Don't like Las Vegas....13
Here on business, not pleasure....4
Smoking complaints....7
Trip was too short....4
Didn't win enough gambling....7
Other....25
Don't Know/No Answer....2

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

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

Employed 69%	**ASK Q61**
Unemployed .... 3 Student .... 5 Retired .... 19 Homemaker 5	**SKIP TO Q62**
DO NOT READ REFUSED/NA 0	**SKIP TO Q62**

61. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS NOT AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=2474)

Professional/technical 27%
Managers/proprietors 18
Sales/clerical 26
Craft workers 10
Service workers 18
Laborers (non-agricultural) 0
Agricultural 1

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

GRADE SCHOOL OR SOME HIGH SCHOOL 1%
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12) 15
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 28
GRADUATED COLLEGE 43
GRADUATE SCHOOL (MASTER'S OR PH.D.) 9
TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 5
REFUSED/NA 0

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

Married 75%
Single 18
Separated or divorced 5
Widowed 2
REFUSED/NA 0

64. What country do you live in?

USA 83%	**ASK Q65**
FOREIGN 17	**SKIP TO Q66**

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

EAST 7%
SOUTH 11
MIDWEST 11
WEST 54
CALIFORNIA 33
NORTHERN CA. 7
SOUTHERN CA. 26
ARIZONA 6
OTHER WEST 15
FOREIGN VISITORS 17

66. **(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 75%
BLACK OR AFRICAN AMERICAN 5
ASIAN OR ASIAN AMERICAN 9
HISPANIC/LATINO 8
NATIVE AMERICAN, MIXED RACE, OTHER 3

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

44.8 MEAN
43.0 MEDIAN

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

21 to 29 .... 19%
30 to 39 24
40 to 49 21
50 to 59 16
60 to 64 6
65 and older 15
REFUSED/NA 0

68. 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 .... 3%
B. $20,000 to $29,999 2
C. $30,000 to $39,999 3
D. $40,000 to $49,999 7
E. $50,000 to $59,999 10
F. $60,000 to $69,999 16
G. $70,000 to $79,999 10
H. $80,000 to $89,999 11
I. $90,000 to $99,999 4
J. $100,000 to $149,999 23
K. $150,000 or more 3
NOT SURE/NO ANSWER 7

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.

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 $109,999

K. $110,000 to $119,999

L. $120,000 to $129,999

M. $130,000 to $139,999

N. $140,000 to $149,999

O. $150,000 or more

Las Vegas Convention and Visitors Authority
3150 Paradise Road, Las Vegas, NV 89109-9096
LasVegas.com

For additional research publications and statistics, visit LVCVA.com.