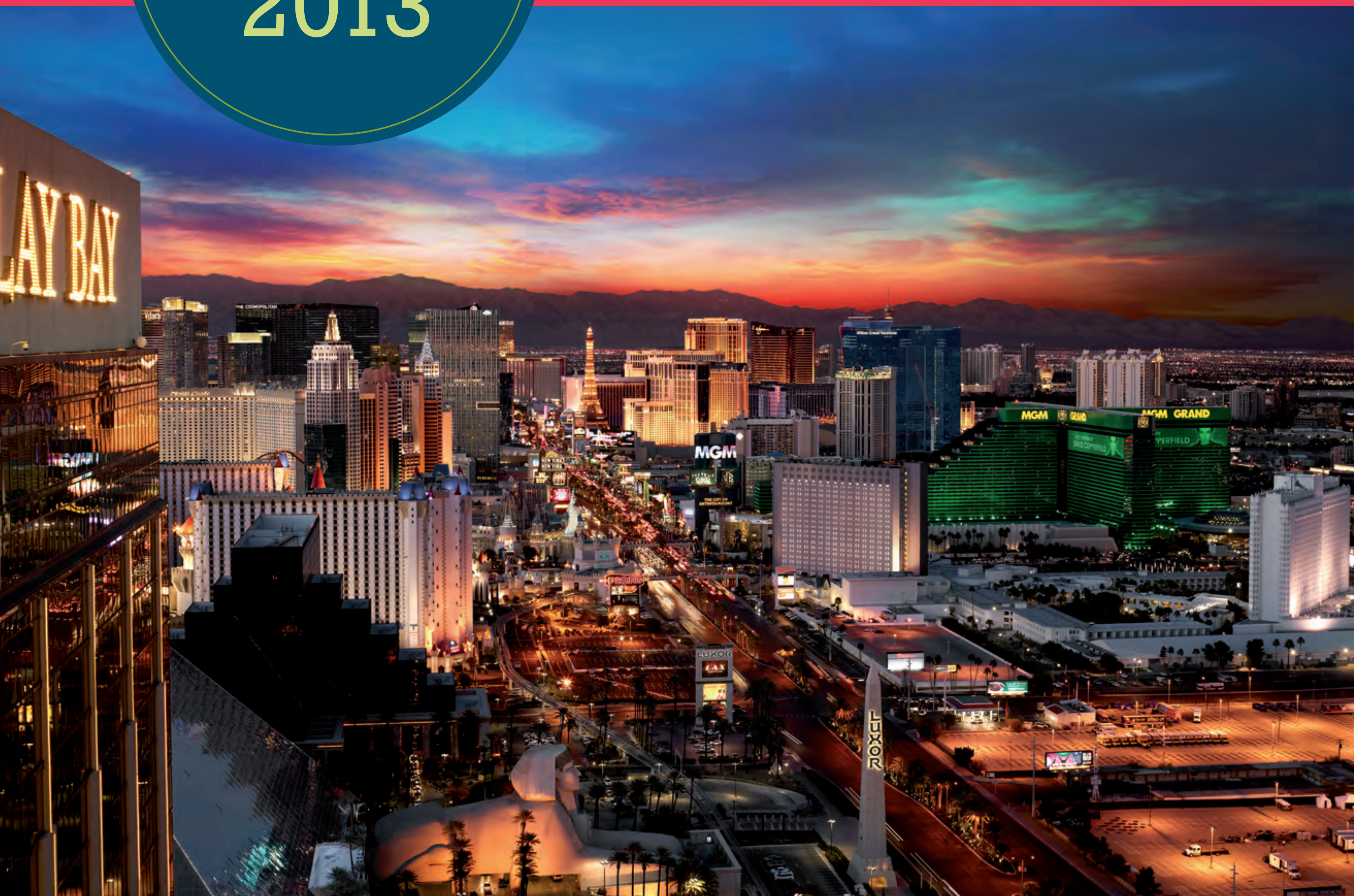
LAS VEGAS
VISITOR PROFILE STUDY
2013



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LAS VEGAS VISITOR PROFILE

Calendar Year 2013

Annual Report

Prepared for:

Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

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

VISITOR PROFILE STUDY

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EXECUTIVE SUMMARY

The Las Vegas Visitor Profile Study is conducted monthly and reported annually to provide an ongoing assessment of the Las Vegas visitor and trends in visitor behavior over time.

This report presents the findings from in-person interviews GLS Research collected as follows: 3,600 from January 1, 2009 to December 31, 2009; January 1, 2010 to December 31, 2010, January 1, 2011 to December 31, 2011 January 1, 2012 to December 31, 2012; and January 1, 2013 to December 31, 2013. Approximately 300 interviews were conducted per month in 2009, 2010, 2011, 2012, and 2013.

This report presents the results of calendar year 2013, as well as the four previous years (2009, 2010, 2011, and 2012). 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 2013. These questions will be rotated back into the questionnaire in Calendar Year 2014 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

Fifteen percent (15%) of 2013 visitors indicated they were first-time visitors to Las Vegas, down from 18% in 2010. Forty-one percent (41%) of all visitors said their primary reason for visiting Las Vegas this trip was vacation or pleasure, down significantly from 2010 – 2012. Fifteen percent (15%) said they came primarily to gamble, up from past readings. Twelve percent (12%) were visiting friends or relatives, down from 15% in 2009, 13% in 2011, and 14% in 2012. Among repeat visitors, 37% came for vacation or pleasure (down from 2010 – 2012), 17% came to gamble (up from 2010 – 2012), and 12% came to visit friends and relatives (down from 16% in 2009, 15% in 2011, and 14% last year). The majority of first-time visitors continue to come primarily for vacation or pleasure (64%, down from 2010 and 2011), while 4% said they came primarily to gamble (up from prior years). Thirteen percent (13%) of first-time visitors said they were visiting friends and relatives, up from 2010 and 2011. Among all visitors, the average number of visits over the past five years was 6.4 (up from 2010 and 2012). Among all visitors, the average number of visits in the past year was 1.7.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2009	2010	2011	2012	2013
Proportion of visitors who were first-time visitors	17%	18%	16%	16%	15%
Proportion of visitors whose primary purpose for current trip was vacation or pleasure	40%	51%	50%	47%	41%
Proportion of visitors whose primary purpose for current trip was to gamble	13%	9%	7%	8%	15%
Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	15%	11%	13%	14%	12%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	35%	47%	46%	43%	37%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	15%	10%	8%	9%	17%
Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	16%	12%	15%	14%	12%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	61%	69%	70%	66%	64%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	2%	1%	1%	1%	4%
Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	10%	8%	7%	14%	13%
Average number of visits in past five years	6.5	5.9	6.2	5.8	6.4
Average number of visits in past year	1.7	1.7	1.7	1.6	1.7

TRAVEL PLANNING — EXECUTIVE SUMMARY

Fifty-eight percent (58%) of visitors in 2013 arrived via ground transportation and 42% arrived by air. Fifty percent (50%) of visitors said they used their own vehicles while traveling around Las Vegas, up from 47% last year. Twenty-seven percent (27%) reported taking a taxi (up from 2009 – 2011), while 52% volunteered that they walked while in Las Vegas (up from 2009 – 2012).

The proportion of visitors who reported using a travel agent to plan their current trip to Las Vegas was 15% in 2013, up from past years. Visitors were asked if they used the Internet to plan their current trip to Las Vegas, and 64% said they had done so, a significant increase over 2009 – 2012. Of these visitors, 59% said they booked their accommodations online (down significantly from prior years), while 41% said they used the Internet to book their transportation (also down from 2009 – 2012). Fifty-one percent (51%) said they found information online that influenced their choice of accommodations (down from 58% in 2009).

The proportion of visitors who said they visited Downtown Las Vegas was 30%, down significantly from past years.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2009	2010	2011	2012	2013
Proportion of visitors who traveled to Las Vegas by ground transportation (automobile/bus/RV)	58%	59%	56%	57%	58%
Proportion of visitors who traveled to Las Vegas by air	42%	41%	44%	43%	42%
Proportion of visitors who used their own vehicle when traveling around Las Vegas	50%	48%	49%	47%	50%
Proportion of visitors who reported walking when traveling around Las Vegas	22%	28%	25%	48%	52%
Proportion of visitors who used taxis when traveling around Las Vegas	21%	23%	24%	29%	27%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Las Vegas	13%	12%	13%	13%	15%
Proportion who used the Internet to plan trip	47%	53%	55%	60%	64%
Proportion of visitors who used the Internet to book accommodations in Las Vegas	69%	67%	69%	66%	59%
Proportion of visitors who used the Internet to book transportation to Las Vegas	58%	56%	54%	47%	41%
Proportion of visitors who used the Internet and said it influenced their choice in accommodations	58%	52%	52%	54%	51%
Proportion of visitors who visited Downtown Las Vegas on their current trip	38%	45%	34%	36%	30%

TRIP CHARACTERISTICS AND EXPENDITURES — EXECUTIVE SUMMARY

The average party size in 2013 was 2.4 persons, up from 2011. Ten percent (10%) of visitors had children under the age of 21 in their immediate party, up from 2009 – 2010. Virtually all visitors (99.8%) stayed overnight.

Visitors in 2013 stayed an average of 3.3 nights and 4.3 days in Las Vegas, down from 2009 and 2011. Among overnighters, 96% stayed in a hotel or motel, with an average of 2.2 room occupants (up from prior years). One-third (32%) of visitors staying in a hotel or motel paid a regular room rate, up from 2009 – 2011. Thirteen percent (13%) purchased a package trip, down from 16% in 2010 and 18% in 2011. The average cost of such a package in 2013 was $868.24, up significantly from prior years.

Over the course of their entire stay in Las Vegas, visitors spent an average of $278.95 for food and drink (up significantly from 2009, 2010, and 2012) and $59.68 for local transportation (up from 2009). Visitors spent an average of $140.90 for shopping (up from 2009 and 2010), $38.45 for shows (down from 2010 – 2012), and $9.29 for sightseeing (up from 2009).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2009	2010	2011	2012	2013
Average number of adults in immediate party	2.4	2.4	2.3	2.4	2.4
Proportion of visitors with persons under 21 in their immediate party	8%	7%	10%	11%	10%
Proportion of visitors who stayed overnight	99.8%	99.3%	99.8%	99.7%	99.8%
Days stayed (average)	4.6	4.6	4.7	4.3	4.3
Nights stayed (average)	3.6	3.6	3.7	3.3	3.3
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	96%	95%	95%	96%	96%
Number of room occupants (average — hotel/motel only)	2.1	2.0	2.1	2.1	2.2
Lodging expenditures (average per night — non-package and non-comp)	$75.78	$79.64	$84.04	$93.13	$83.62
Proportion of visitors who paid a regular room rate	20%	23%	18%	32%	32%
Proportion of visitors who bought a package or travel group trip	15%	16%	18%	14%	13%
Average cost of package per person (among package/tour group visitors)	$640.29	$651.02	$757.83	$743.65	$868.24
Average trip expenditures for food and drink	$250.32	$256.82	$274.69	$265.11	$278.95
Average trip expenditures for local transportation	$53.31	$62.87	$64.25	$57.77	$59.68
Average trip expenditures for shopping	$101.97	$122.80	$129.34	$149.29	$140.90
Average trip expenditures for shows	$39.87	$49.28	$47.52	$42.89	$38.45
Average trip expenditures for sightseeing	$5.77	$7.21	$10.24	$9.63	$9.29

GAMING BEHAVIOR AND BUDGETS — EXECUTIVE SUMMARY

Seventy-one percent (71%) of 2013 visitors said they gambled while in Las Vegas, down significantly from 83% in 2009, 80% in 2010, and 77% in 2011. Gamblers spent an average of 2.9 hours per day gambling, down significantly from 3.2 hours in 2009 but up from 2.6 hours last year. The average gaming budget in 2013 was $529.57, up significantly from $466.20 in 2010 and $447.63 in 2011. Twenty-four percent (24%) of visitors said they would be *more* likely to visit Las Vegas even with the wider gambling choices available to them, down significantly from 39% in 2009, 35% in 2010, and 27% in 2011.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2009	2010	2011	2012	2013
Proportion who gambled while visiting Las Vegas	83%	80%	77%	72%	71%
Average number of hours per day spent gambling (among those who gambled)	3.2	2.9	2.9	2.6	2.9
Average trip gambling budget (among those who gambled)	$481.57	$466.20	$447.63	$484.70	$529.57
Proportion who said they would be “more likely” to visit Las Vegas even with more places to gamble outside Las Vegas	39%	35%	27%	25%	24%

ENTERTAINMENT — EXECUTIVE SUMMARY

Seventy-two percent (72%) of visitors attended shows during their current stay, up significantly from 2009 – 2012. Among those who saw a show in Las Vegas, 87% went to a lounge act, up significantly from prior years. Thirteen percent (13%) of visitors who saw shows saw a big-name headliner, down from 2009 – 2011. Eight percent (8%) of these visitors attended comedy shows, down from prior years. Fifteen percent (15%) of all visitors said they had been to other paid attractions in Las Vegas, down from 20% in 2010 and 18% in 2011, but up from 13% last year.

SUMMARY TABLE OF ENTERTAINMENT ACTIVITIES

	2009	2010	2011	2012	2013
Proportion who attended any shows during their current stay in Las Vegas	64%	68%	60%	65%	72%
Proportion who attended lounge acts (among those who attended shows)	69%	66%	73%	78%	87%
Proportion who attended big-name headliner performances (among those who attended shows)	19%	18%	17%	14%	13%
Proportion who attended comedy shows (among those who attended shows)	18%	17%	11%	11%	8%
Proportion who went to other paid attractions in Las Vegas	16%	20%	18%	13%	15%

ATTITUDINAL INFORMATION — EXECUTIVE SUMMARY

Eighty-nine percent (89%) of visitors reported being “very satisfied” with their trip to Las Vegas, down significantly from 94% each in 2009, 2010, and 2012, and 92% in 2011.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2009	2010	2011	2012	2013
Proportion who were “very satisfied” with their current trip to Las Vegas	94%	94%	92%	94%	89%
Proportion who were “somewhat satisfied” with their current trip to Las Vegas	5%	5%	7%	5%	10%

VISITOR DEMOGRAPHICS — EXECUTIVE SUMMARY

Visitors in 2013 were likely to be married (79%, up from 75% in 2012), earning $40,000 or more (88%, up significantly from past years), and employed (67%). Twenty percent (20%) were retired (down from 2009 – 2011). The proportion of visitors who were 40 years old or older was 58% (down from 2009 – 2011), and the average age was 45.8 (down significantly from 2009 – 2011 but up from 2012). More than one-half (52%) of visitors were from the western United States (down significantly from 55% each in 2009 and 2011), with the bulk of them coming from California (33%, up from 2009 – 2011). Twenty percent (20%) of visitors were from foreign countries, up significantly from 14% in 2009, 16% in 2011, and 17% in 2012.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2009	2010	2011	2012	2013
Proportion of visitors who were married	78%	79%	77%	75%	79%
Proportion of visitors with a household income of $40,000 or more	83%	81%	87%	84%	88%
Proportion of visitors who were employed	65%	66%	66%	69%	67%
Proportion of visitors who were retired	28%	27%	25%	19%	20%
Proportion of visitors who were 40 years old or older	72%	71%	70%	58%	58%
Average age	50.0	49.2	49.0	44.8	45.8
Proportion of visitors with a college diploma	47%	48%	50%	52%	51%
Proportion of visitors from the West	55%	54%	55%	54%	52%
Proportion of visitors from California	31%	30%	31%	33%	33%
Proportion of visitors from a foreign country	14%	18%	16%	17%	20%

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 2013.

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2009	2010	2011	2012	2013
Days stayed (average)	4.6	4.6	4.7	4.3	4.3
Nights stayed (average)	3.6	3.6	3.7	3.3	3.3
Proportion of visitors who stayed overnight	99.8%	99.3%	99.8%	99.7%	99.8%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	96%	95%	95%	96%	96%
Lodging expenditures (average per night — non-package and non-comp)	$75.78	$79.64	$84.04	$93.13	$83.62
Proportion of visitors who bought a package or travel group trip	15%	16%	18%	14%	13%
Average cost of package per person (among package/tour group visitors)	$640.29	$651.02	$757.83	$743.65	$868.24
Number of room occupants (average)	2.1	2.0	2.1	2.1	2.2
Average trip expenditures for food and drink	$250.32	$256.82	$274.69	$265.11	$278.95
Average trip expenditures for local transport	$53.31	$62.87	$64.25	$57.77	$59.68
Average trip expenditures for shopping	$101.97	$122.80	$129.34	$149.29	$140.90
Average trip expenditures for shows	$39.87	$49.28	$47.52	$42.89	$38.45
Average trip expenditures for sightseeing	$5.77	$7.21	$10.24	$9.63	$9.29
Proportion who gambled while visiting Las Vegas	83%	80%	77%	72%	71%
Average trip gambling budget (among those who gambled)	$481.57	$466.20	$447.63	$484.70	$529.57

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 2013. These questions will be rotated back into the questionnaire in Calendar Year 2014 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 2013 (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 2013 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 2013 study, as well as for the previous four calendar years (2009, 2010, 2011, and 2012). 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 2013. These questions will be rotated back into the questionnaire in Calendar Year 2014 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

Fifteen percent (15%) of 2013 visitors indicated they were first-time visitors to Las Vegas, down significantly from 18% in 2010 (Figure 1). Eighty-five percent (85%) were repeat visitors, up from 82% in 2010.

FIGURE 1
First Visit Vs. Repeat Visit

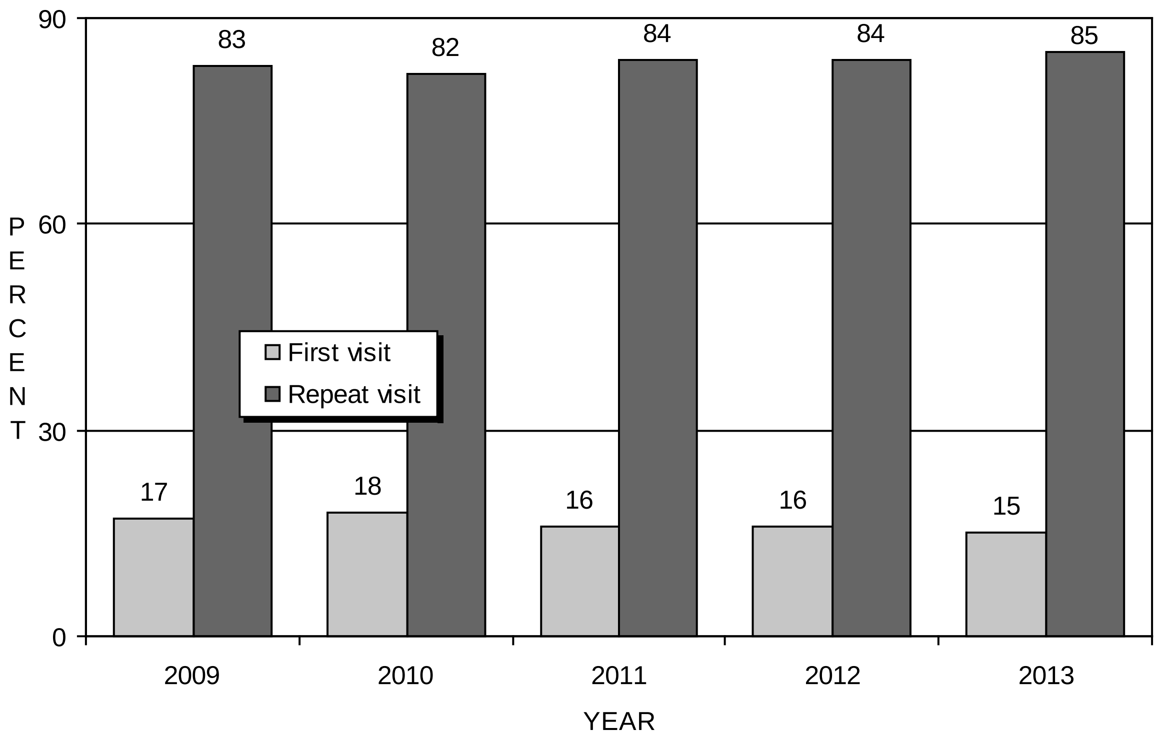
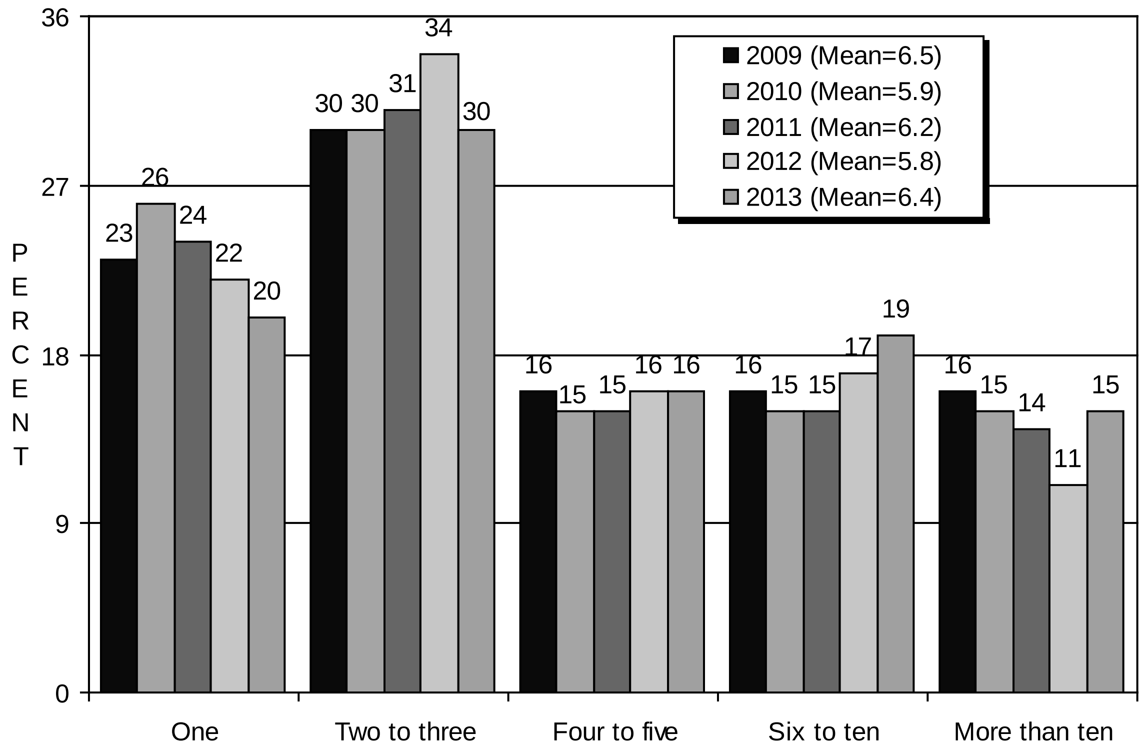
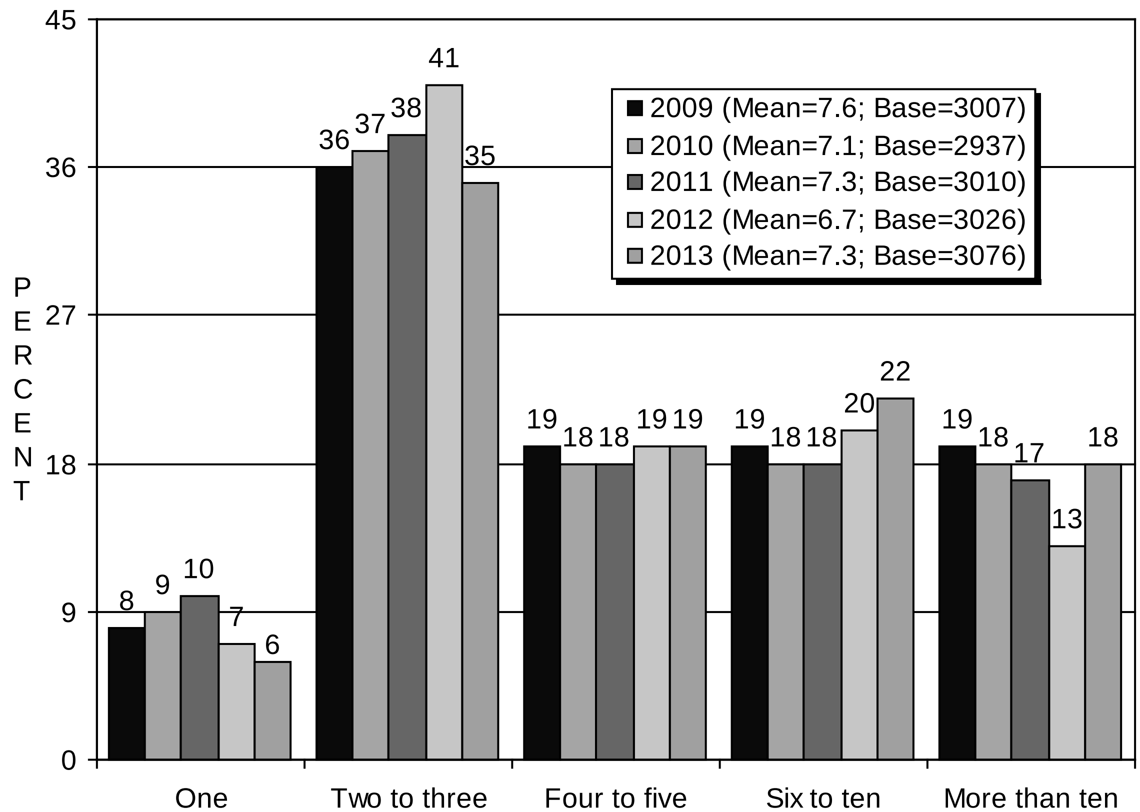


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



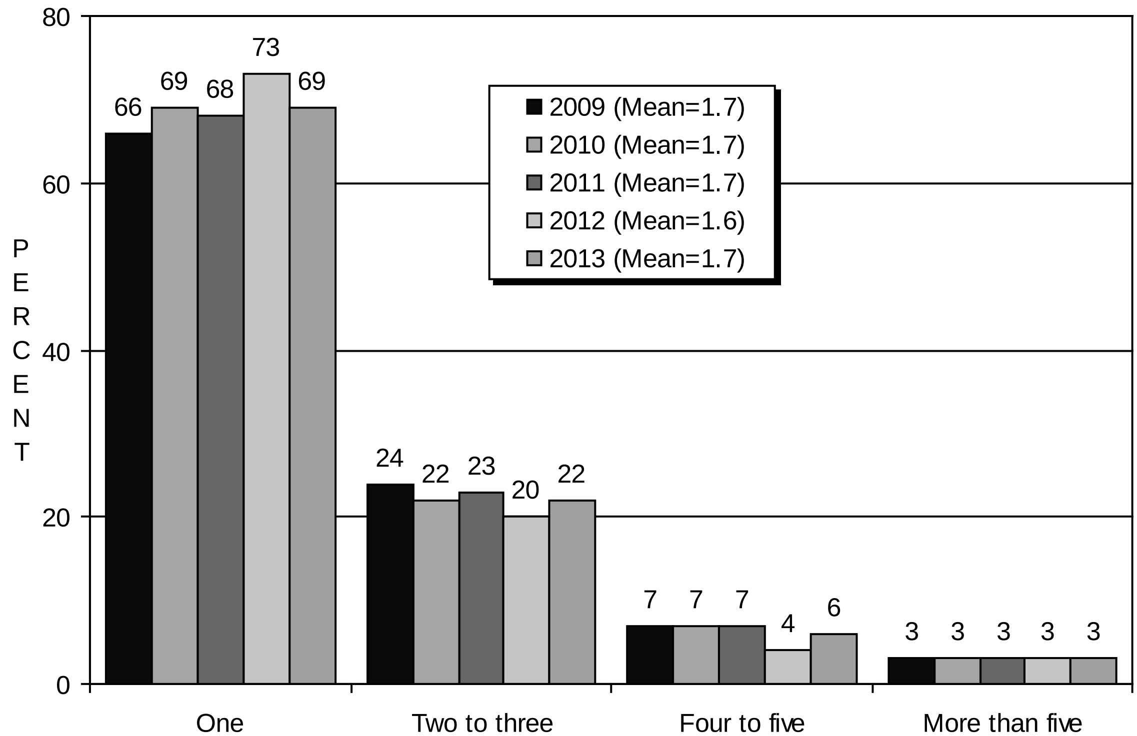
Among all visitors, the average number of visits to Las Vegas over the past five years was 6.4, up significantly from 5.9 in 2010 and 5.8 in 2012 (Figure 2). Twenty percent (20%) of visitors said they visited Las Vegas only once in the past five years (down significantly from 23% in 2009, 26% in 2010, and 24% in 2011), while 30% visited two to three times (down from 34% last year). Nineteen percent (19%) visited six to 10 times in the past five years (up from 16% in 2009, 15% each in 2010 and 2011, and 17% in 2012), while 15% said they visited more than 10 times (up from 11% last year).

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



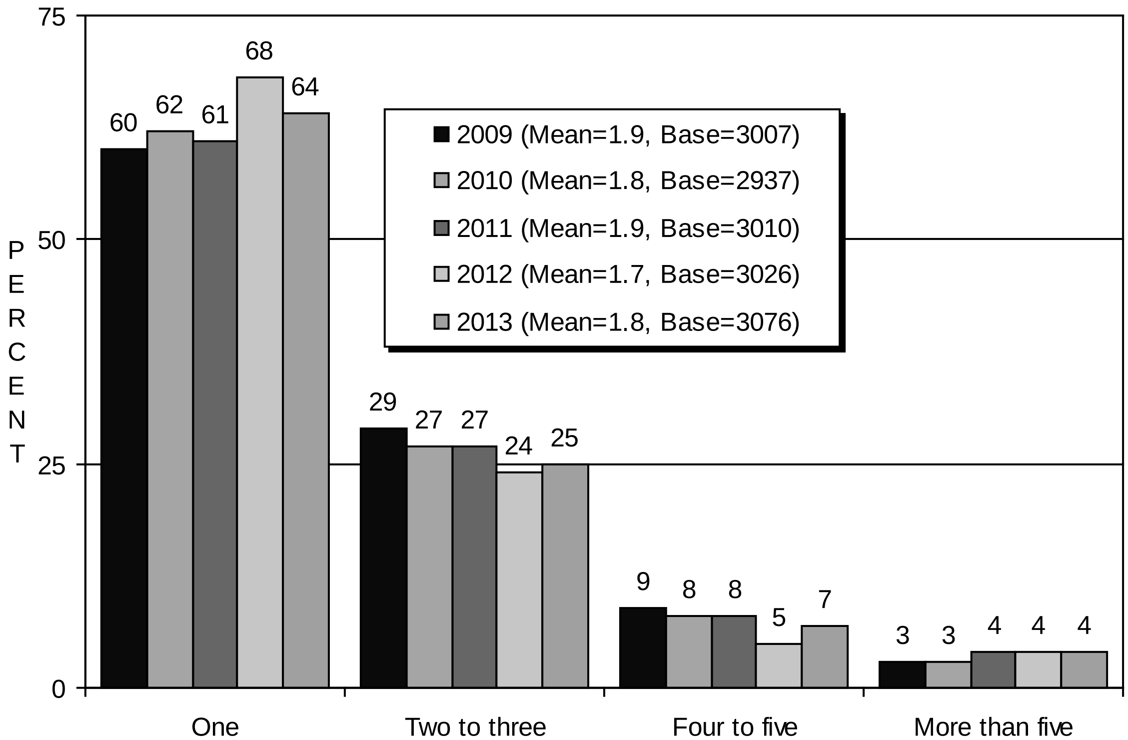
In 2013, *repeat visitors* reported making an average of 7.3 visits to Las Vegas in the past five years, up significantly from 6.7 in 2012 (Figure 3). Six percent (6%) of repeat visitors said they visited Las Vegas only once in the past five years (down from 8% in 2009, 9% in 2010, and 10% in 2011), while 35% visited two to three times (down from 41% last year). Twenty-two percent (22%) visited six to 10 times in the past five years (up from 19% in 2009 and 18% each in 2010 and 2011), while 18% said they visited more than 10 times (up from 13% last year).

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



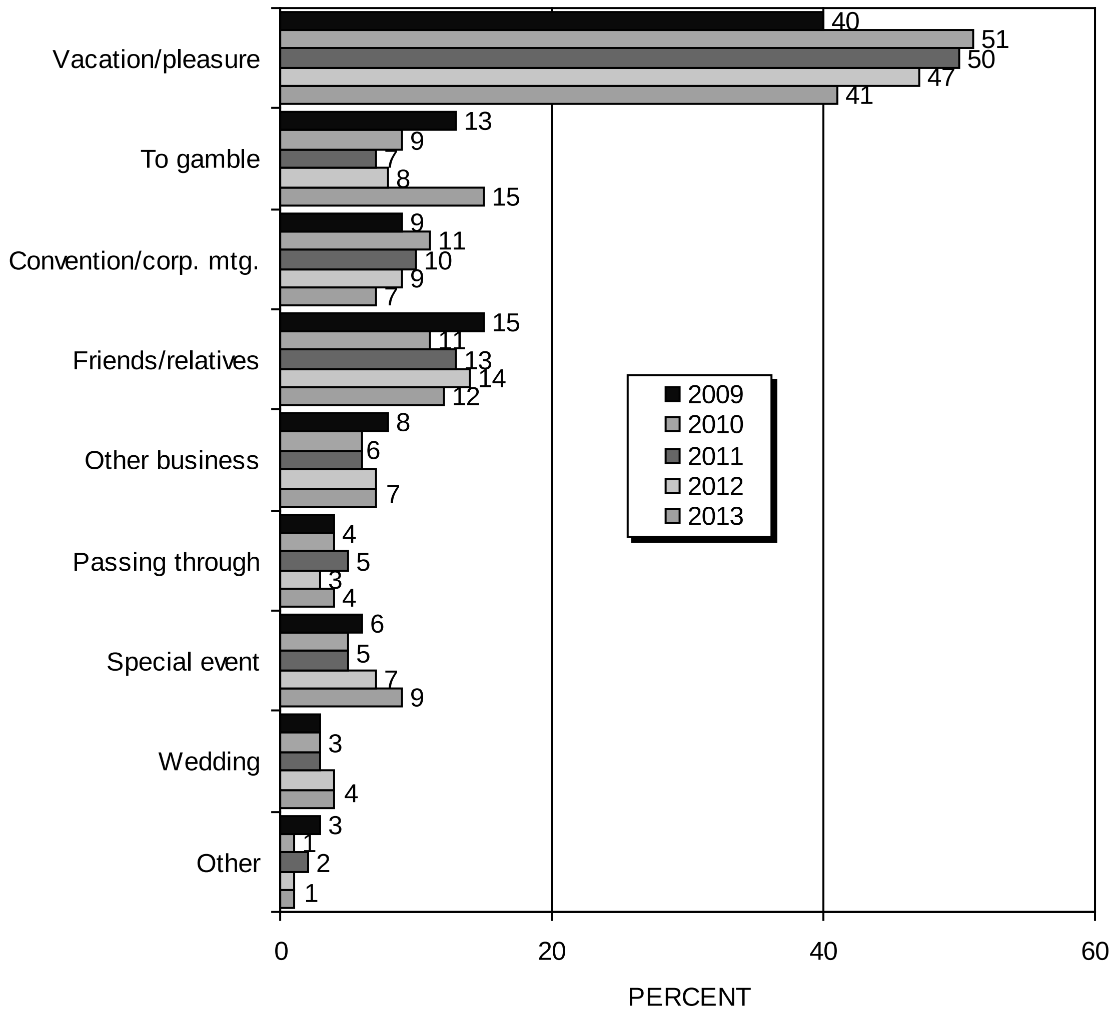
Among all visitors, the average number of visits to Las Vegas in the past 12 months was 1.7 (Figure 4). Sixty-nine percent (69%) of visitors reported visiting just once in the past year (up significantly from 66% in 2009 but down from 73% last year), while 22% visited two to three times (down from 24% in 2009), 6% visited four to five times (up from 4% in 2012), and 3% visited more than five times.

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



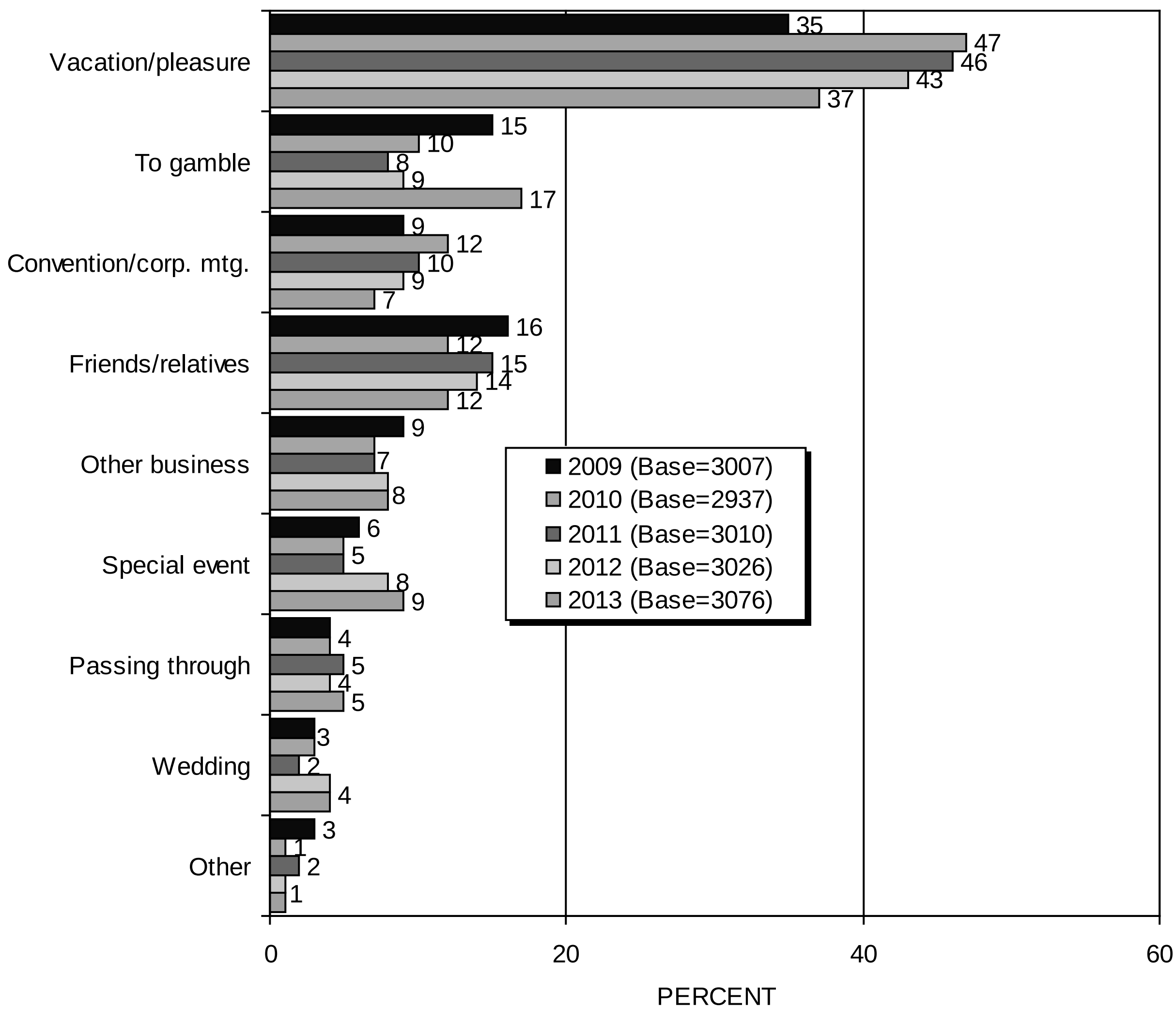
Among *repeat* visitors, the average number of visits to Las Vegas during the past year was 1.8 (Figure 5). Sixty-four percent (64%) of repeat visitors reported visiting just once in the past year (up significantly from 60% in 2009 but down from 68% last year), while 25% visited two to three times (down from 29% in 2009), 7% visited four to five times (up from 5% last year), and 4% visited more than five times

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



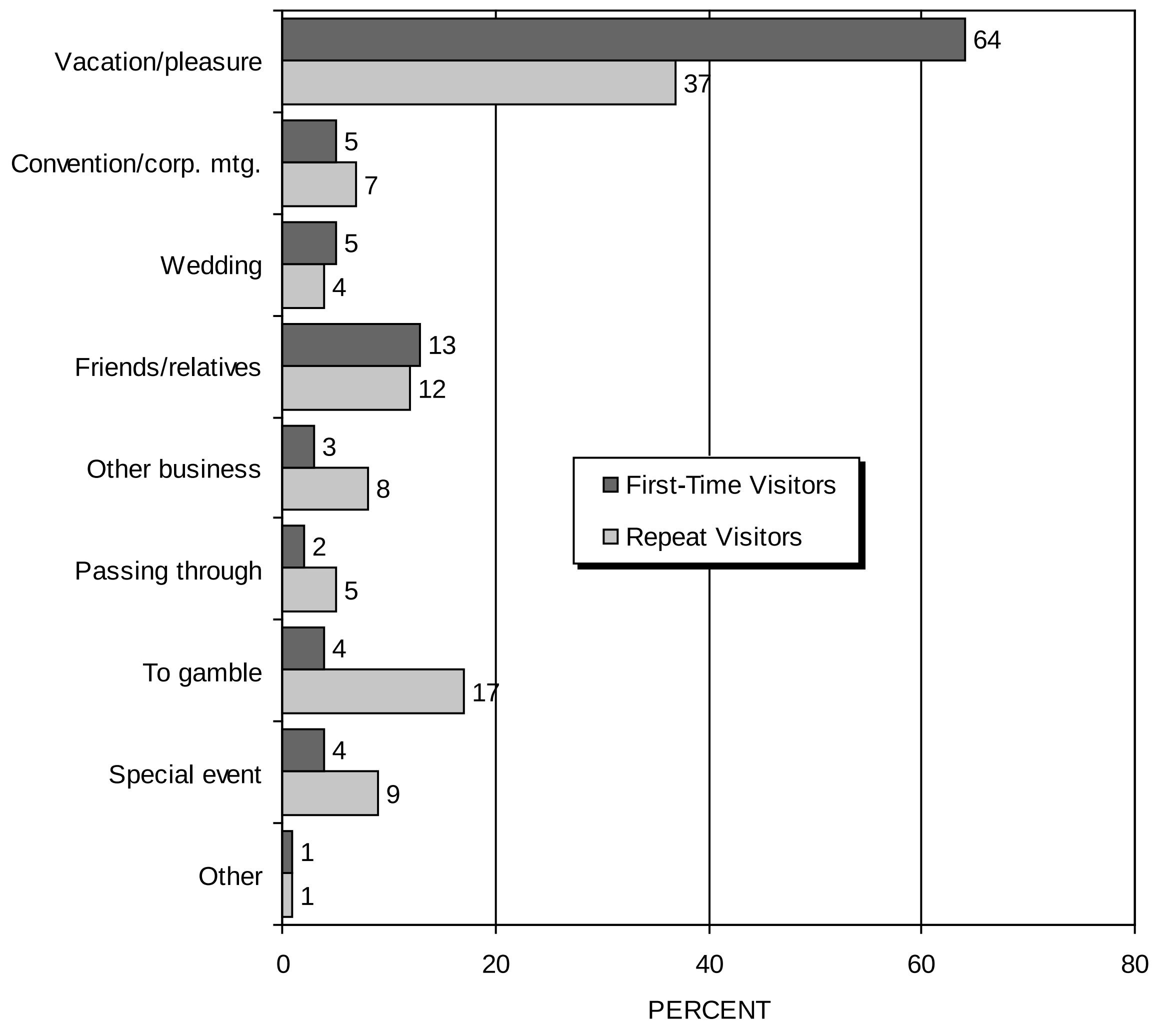
When asked about the primary purpose of their current visit to Las Vegas, 41% of all visitors mentioned vacation or pleasure, down significantly from 51% in 2010, 50% in 2011, and 47% in 2012 (Figure 6). Fifteen percent (15%) said they were in Las Vegas primarily to gamble, up significantly from 2009 – 2012 readings. Seven percent (7%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 2009 – 2012), while another 7% were in town on other business (up from 6% each in 2010 and 2011). Twelve percent (12%) were visiting friends or relatives, down from 15% in 2009, 13% in 2011, and 14% in 2012. Nine percent (9%) said they were in town for a special event (up significantly from past years), while 4% each said they came for a wedding (up from 3% in 2009 – 2011) or were just passing through, and 1% came for a casino tournament.

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



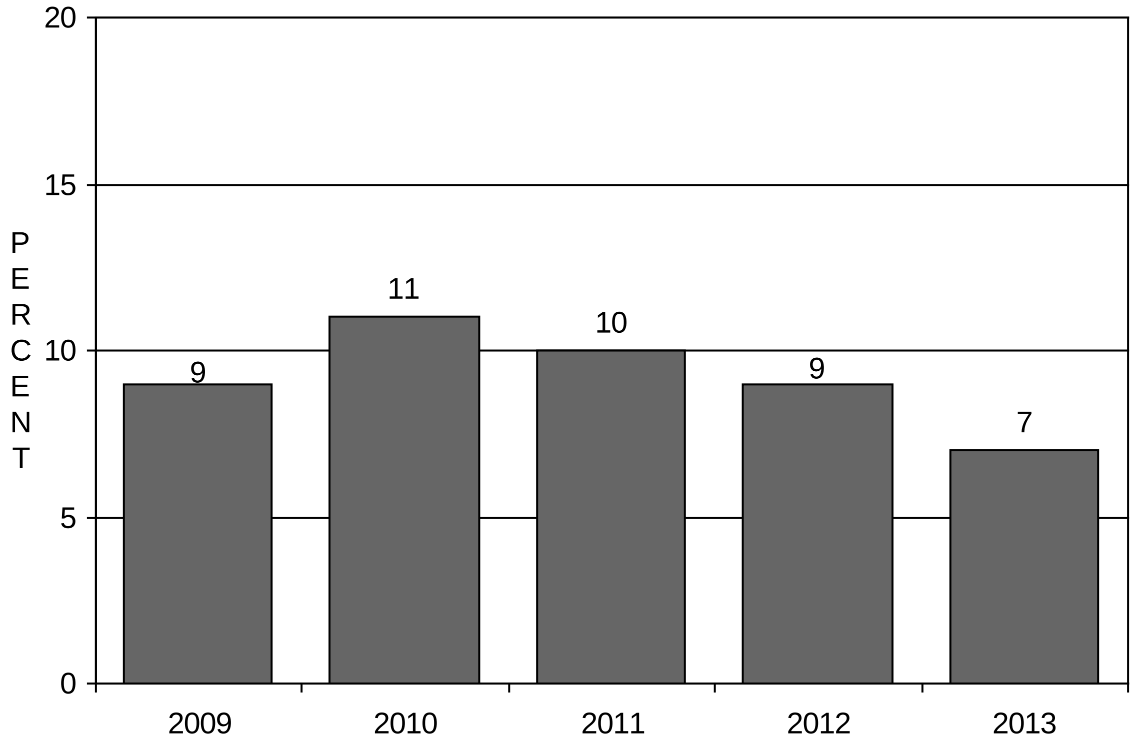
The proportion of *repeat visitors* who said the primary purpose of their current visit to Las Vegas was vacation or pleasure was 37%, down significantly from 47% in 2010, 46% in 2011, and 43% in 2012 (Figure 7). Seventeen percent (17%) said they were in Las Vegas primarily to gamble, up from 10% in 2010, 8% in 2011, and 9% in 2012. Seven percent (7%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 2009 – 2012), while 8% were in town on other business. Twelve percent (12%) were visiting friends or relatives, down from 16% in 2009, 15% in 2011, and 14% last year. Nine percent (9%) said they were in town for a special event (up significantly from 6% in 2009 and 5% each in 2010 and 2011), while 5% were just passing through, and 4% came for a wedding (up from 3% each in 2009 and 2010, and 2% in 2011).

FIGURE 8
Primary Purpose Of Current Visit
(First-Time Versus Repeat Visitors — 2013)



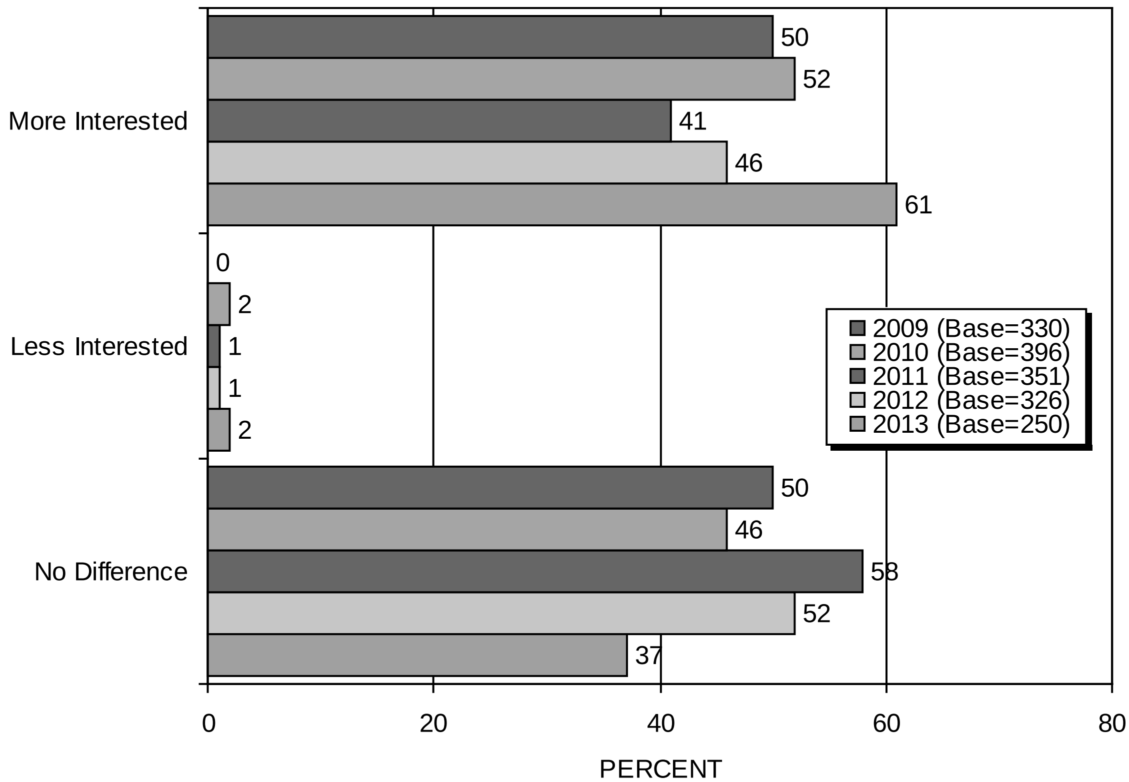
The primary purpose for the current visit among both first-time and repeat visitors is presented in Figure 8. First-time visitors were significantly more likely than repeat visitors to say they were visiting Las Vegas primarily for vacation or pleasure (64% vs. 37%). Repeat visitors were more likely than first-time visitors to say that their current trip to Las Vegas was to gamble (17% vs. 4%), to attend a special event (9% vs. 4%), or for business purposes other than a convention or corporate meeting (8% vs. 3%).

FIGURE 9
Conventions/Trade Shows/Corporate Meetings



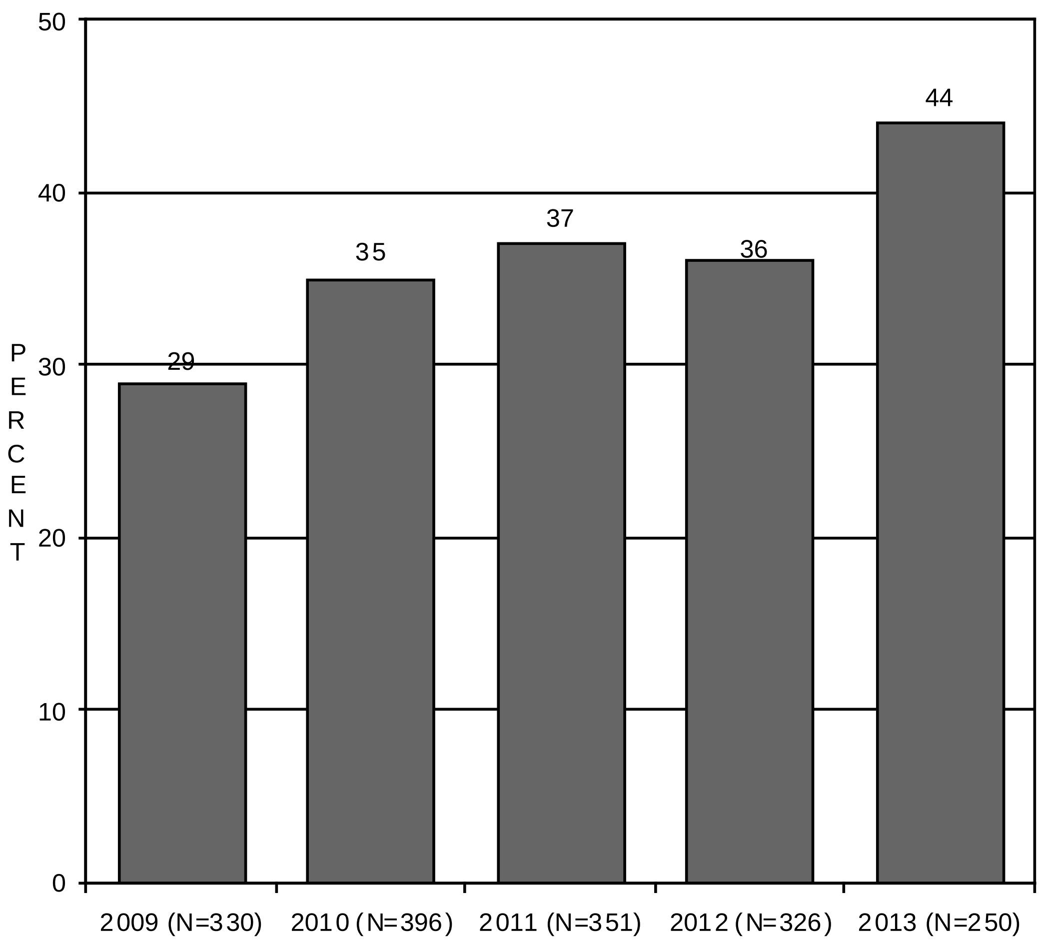
Visitors were asked if they had attended a convention, trade show, or corporate meeting while in Las Vegas (Figure 9). Seven percent (7%) said they had, down significantly from 9% in 2009 and 2012, 11% in 2010, and 10% in 2011.

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 2013, 61% said having the convention in Las Vegas made them more interested in attending (up significantly from 2009 – 2012), while 37% said it made no difference (down from past readings). Two percent (2%) 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. Forty-four percent (44%) of convention visitors in 2013 said they had, up significantly from 29% in 2009, 35% in 2010, and 36% last year (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. Fifty-three percent (53%) of visitors in 2013 planned their trip to Las Vegas more than one month in advance (Figure 12), down significantly from 55% in 2009 but up from 50% in 2011 and 46% in 2012. Forty-two percent (42%) planned their trip from one week to one month in advance, down from 48% last year. The remaining 5% planned their trip less than a week in advance, similar to past years.

FIGURE 12
Advance Travel Planning

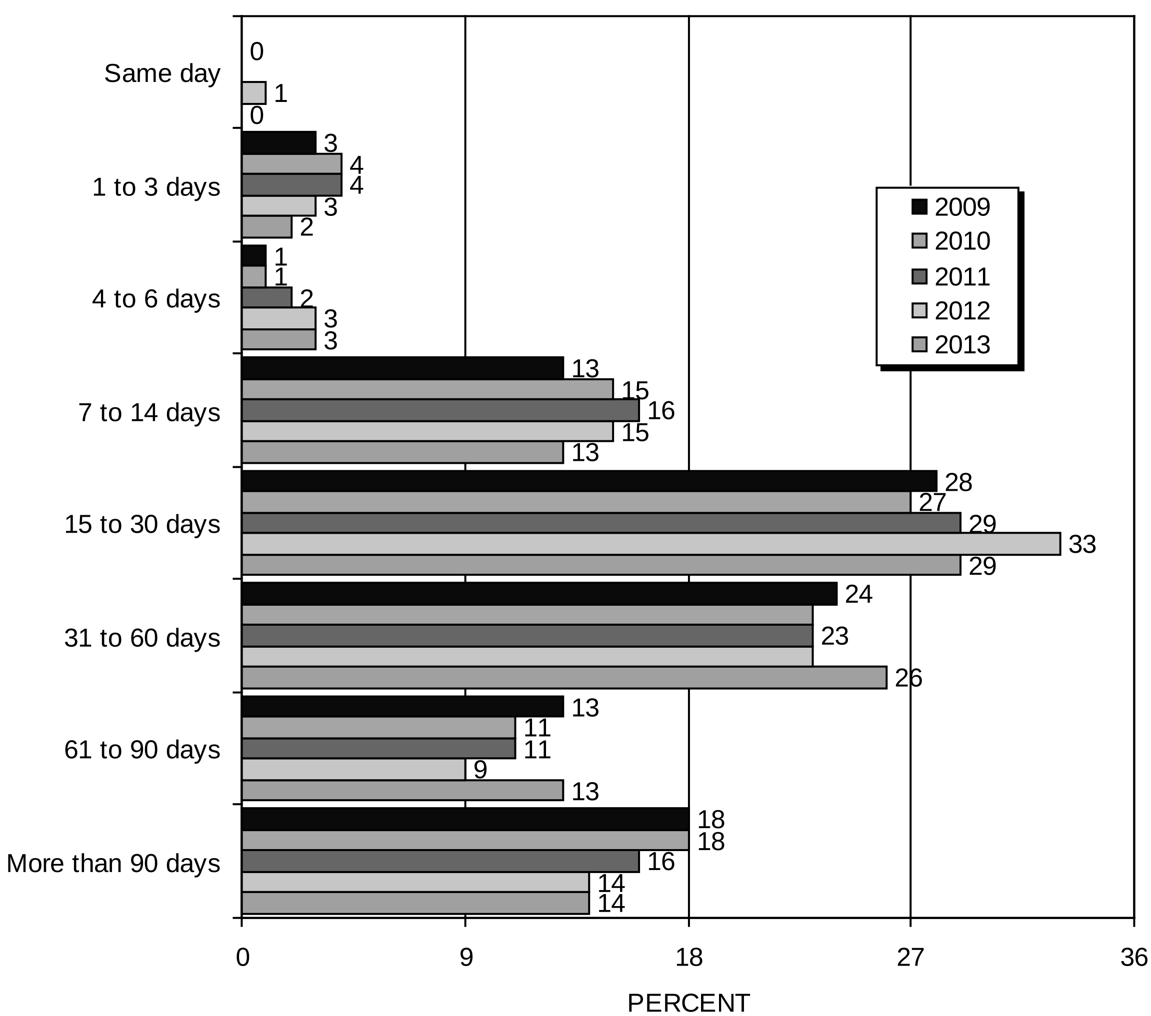
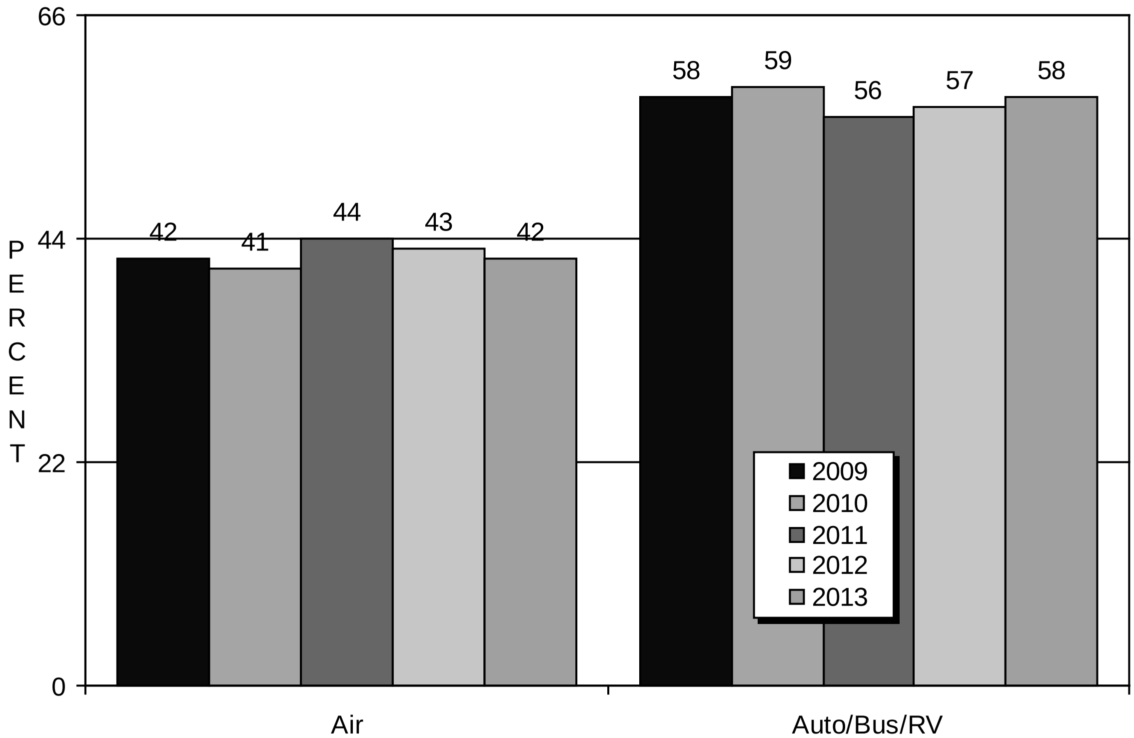
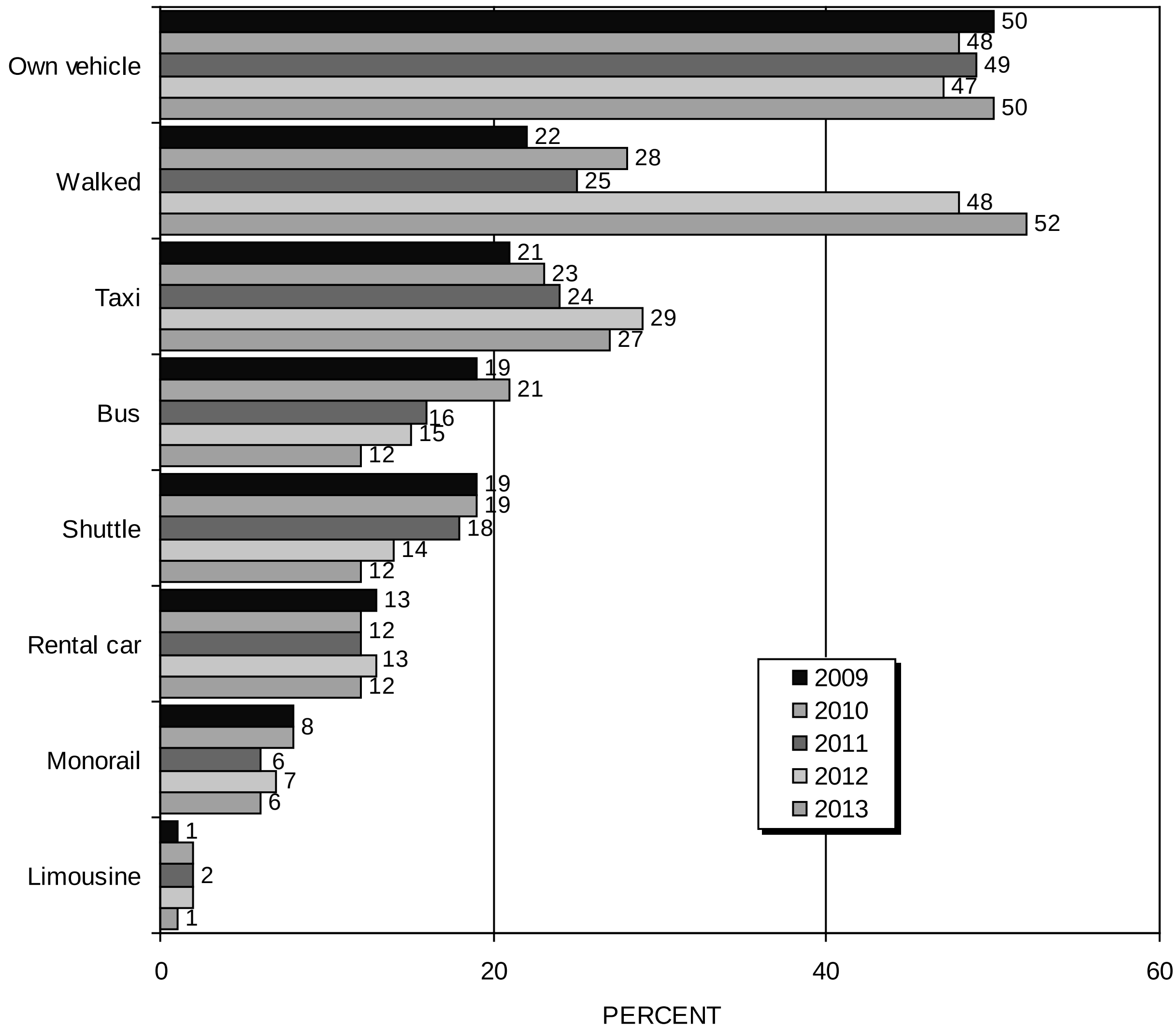


FIGURE 13
Transportation To Las Vegas



Forty-two percent (42%) of visitors to Las Vegas in 2013 arrived by air, while 58% arrived by ground transportation, results similar to past years (Figure 13).

FIGURE 14
Local Transportation*



Fifty percent (50%) of visitors said that they used their own vehicle when traveling around Las Vegas, up significantly from 47% in 2012 (Figure 14). Fifty-two percent (52%) volunteered that they walked while in Las Vegas, up from prior years. Twenty-seven percent (27%) reported taking a taxi (up from 21% in 2009, 23% in 2010, and 24% in 2011), while 12% each reported taking a bus or using a hotel shuttle (both down significantly from prior years), and another 12% reported using a rental car. Six percent (6%) reported using the Monorail, down significantly from 8% each in 2009 and 2010.

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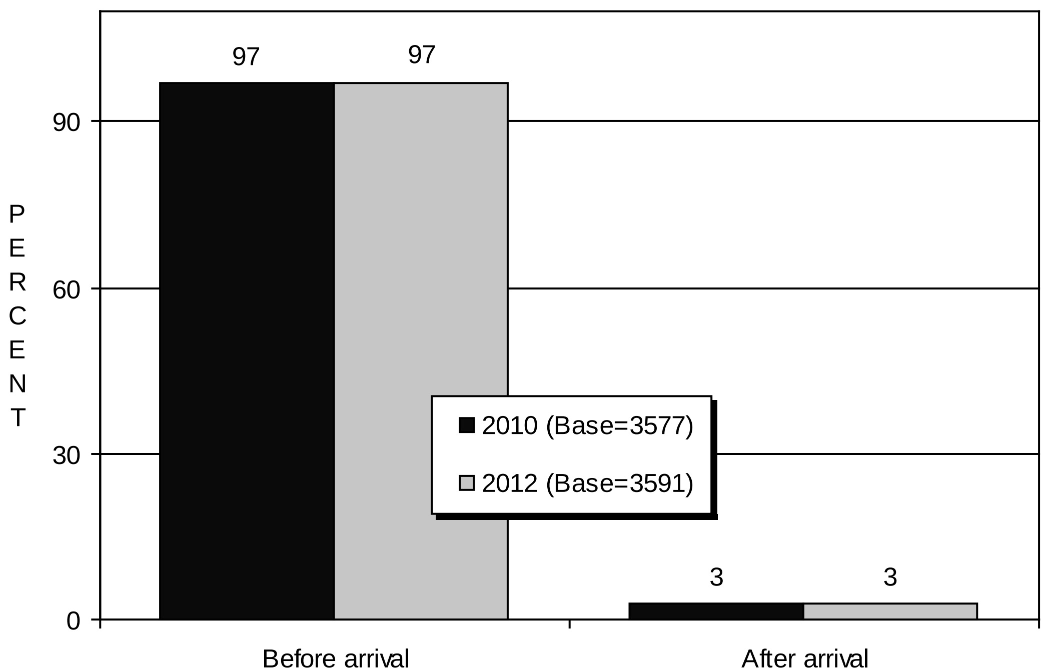
* Multiple responses to this question were permitted.

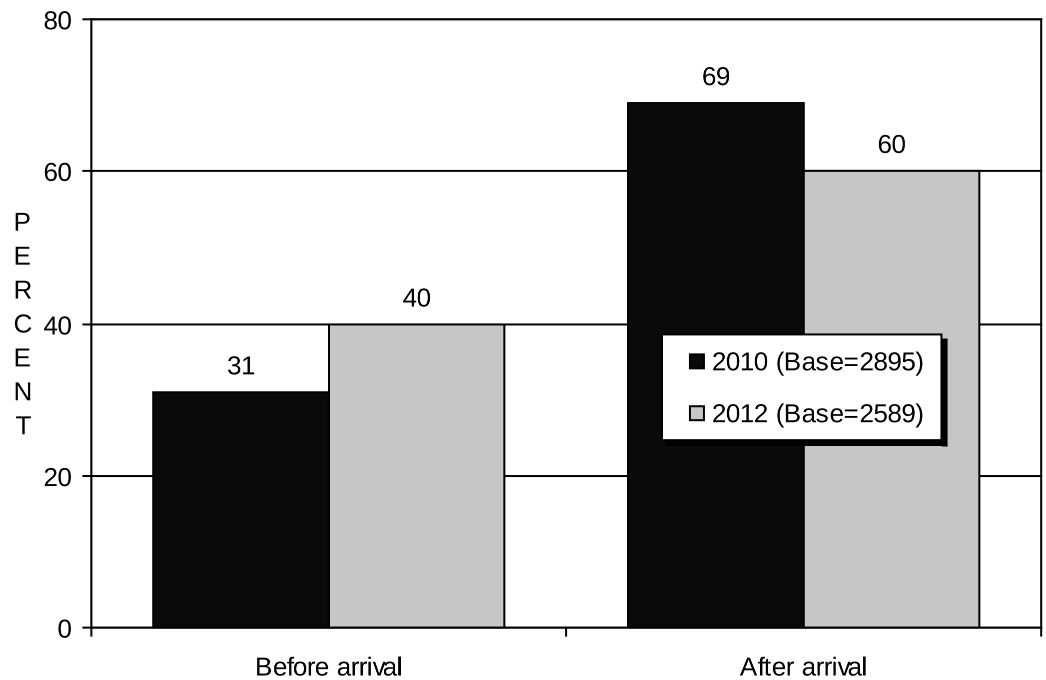
FIGURE 15
When Decided Where To Stay*
(Among Those Who Stayed Overnight – Asked Every Other Year)



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

* This question is asked every other year and was not asked in 2009, 2011, or 2013.

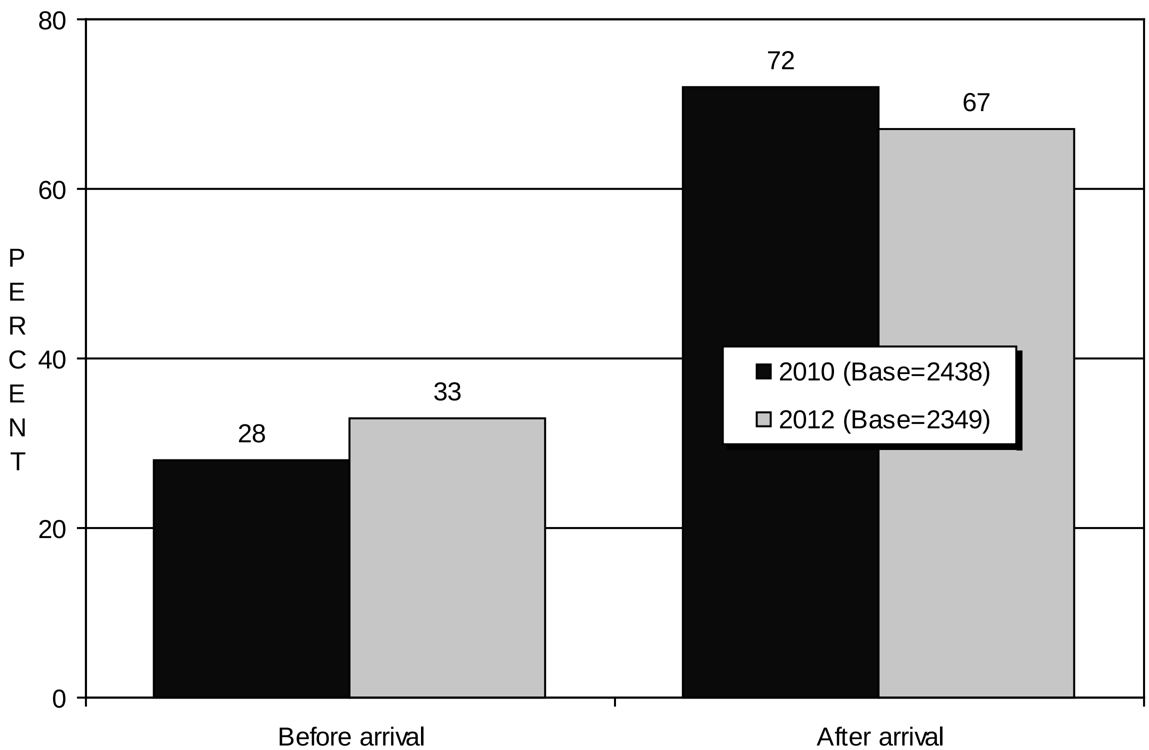
FIGURE 16
When Decided Where To Gamble*
(Among Those Who Gambled – Asked Every Other Year)



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, 2011, or 2013.

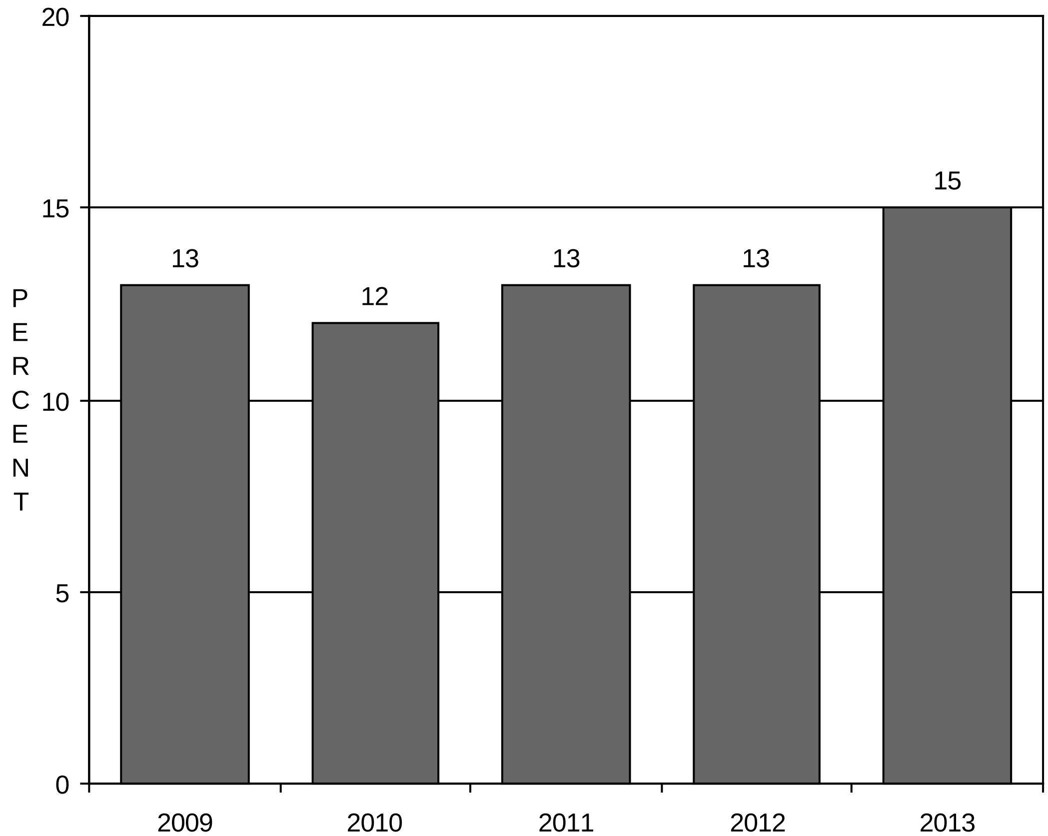
FIGURE 17
When Decided Which Shows To See*
(Among Those Who Saw Shows – Asked Every Other Year)



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

* This question is asked every other year and was not asked in 2009, 2011, or 2013.

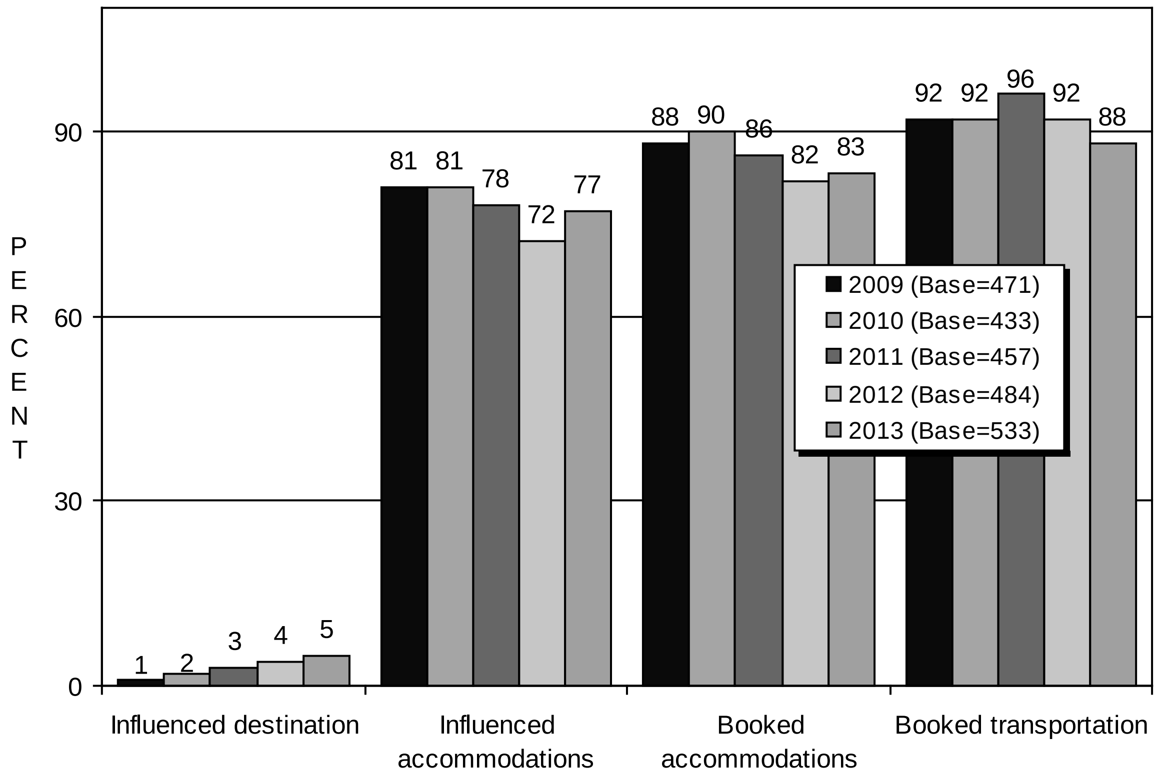
FIGURE 18
Travel Agent Assistance*



Fifteen percent (15%) of visitors reported using a travel agent to plan their trip to Las Vegas, up 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), 83% said the travel agent booked their accommodations (down significantly from 90% in 2010), while 88% said the travel agent booked their transportation (down significantly from 92% each in 2009, 2010, and 2012, and 96% in 2011).

Seventy-seven percent (77%) of these visitors said their travel agent influenced their choice of accommodations in Las Vegas, while 5% said the travel agent influenced their choice of destination (up from 1% in 2009, 2% in 2010, and 3% in 2011).

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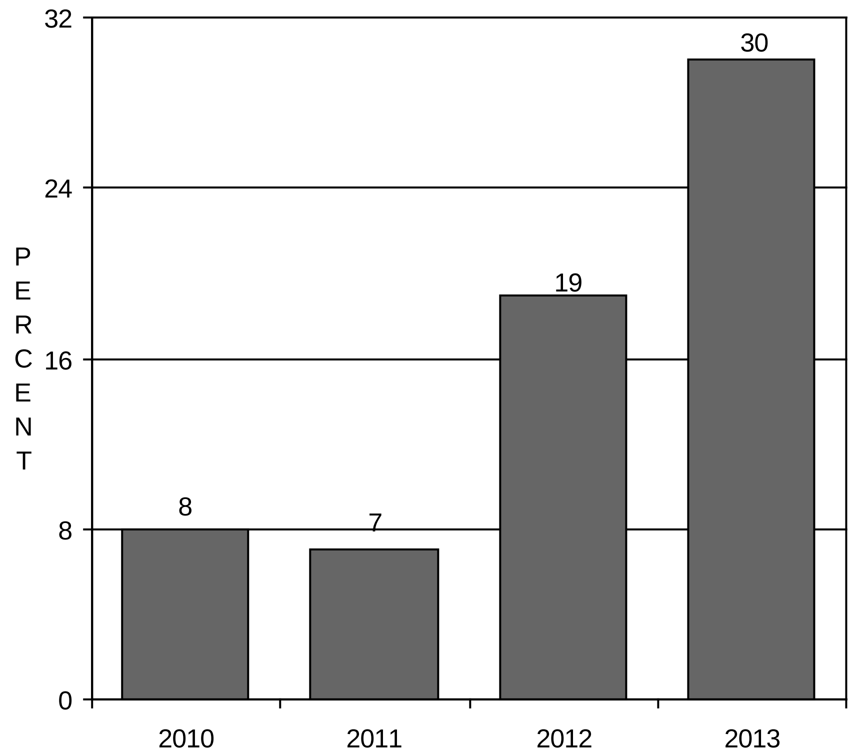
* Only “yes” responses are reported in this chart.

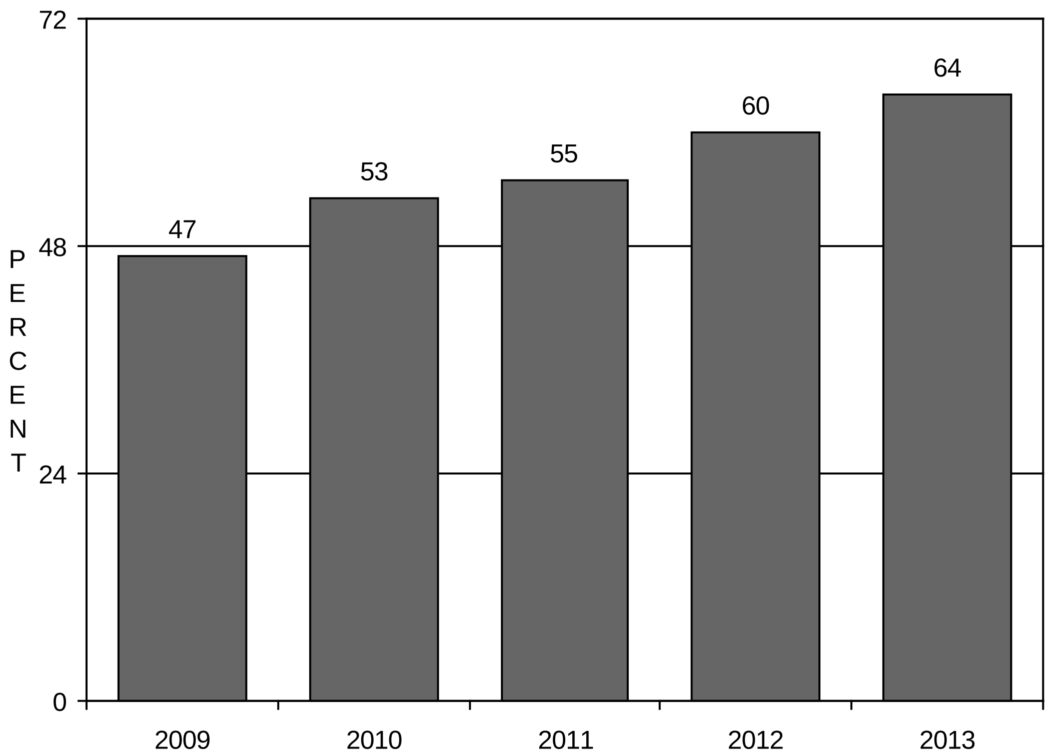
FIGURE 20
Whether Used Social Media Web Sites To Plan Trip*



Beginning in 2010, visitors were asked if they had used any social media web sites, such as Facebook, Twitter, or others, to help in planning their trip to Las Vegas. In 2013, 30% of visitors said they had, up significantly from 8% in 2010, 7% in 2011, and 19% in 2012 (Figure 20).

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

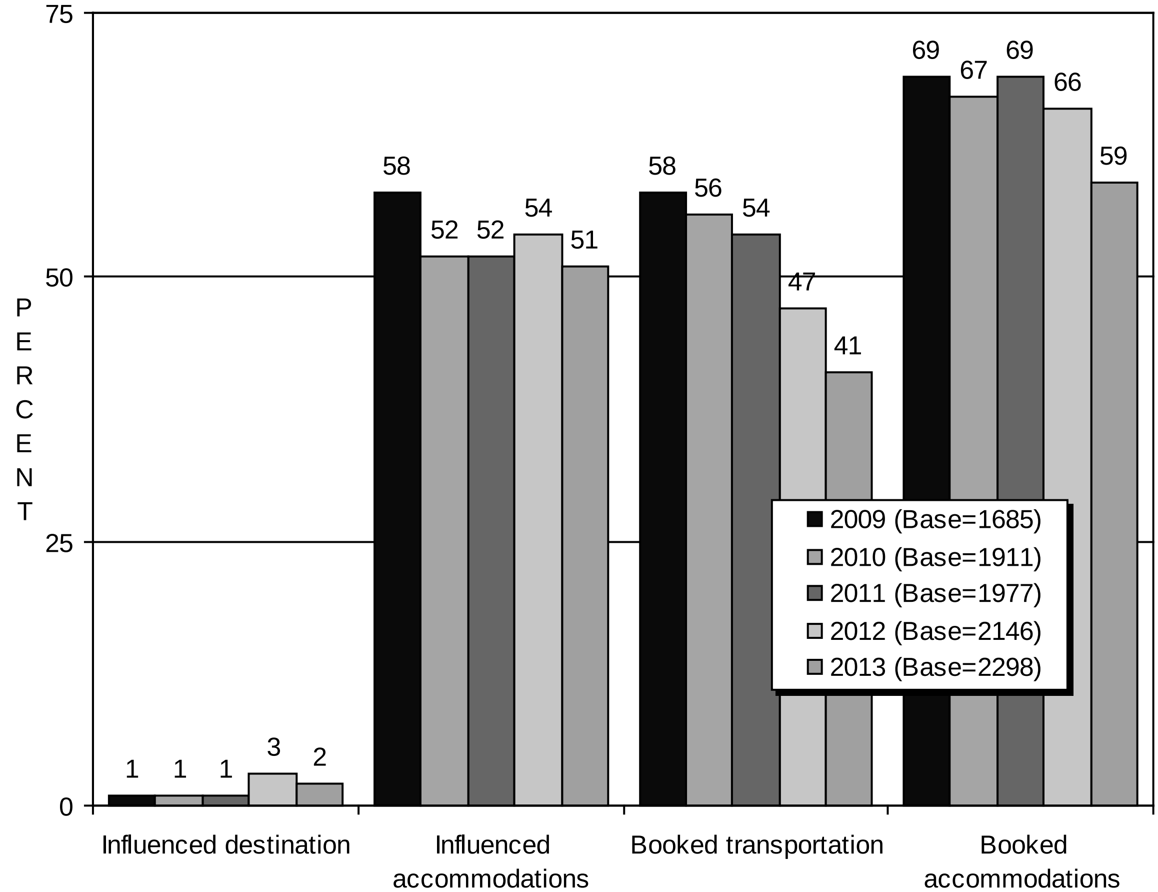
FIGURE 21
Whether Used The Internet To Plan Trip*



Visitors were asked if they used the Internet to plan their trip, and 64% said yes, up significantly from 47% in 2009, 53% in 2010, 55% in 2011, and 60% in 2012 (Figure 21).

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

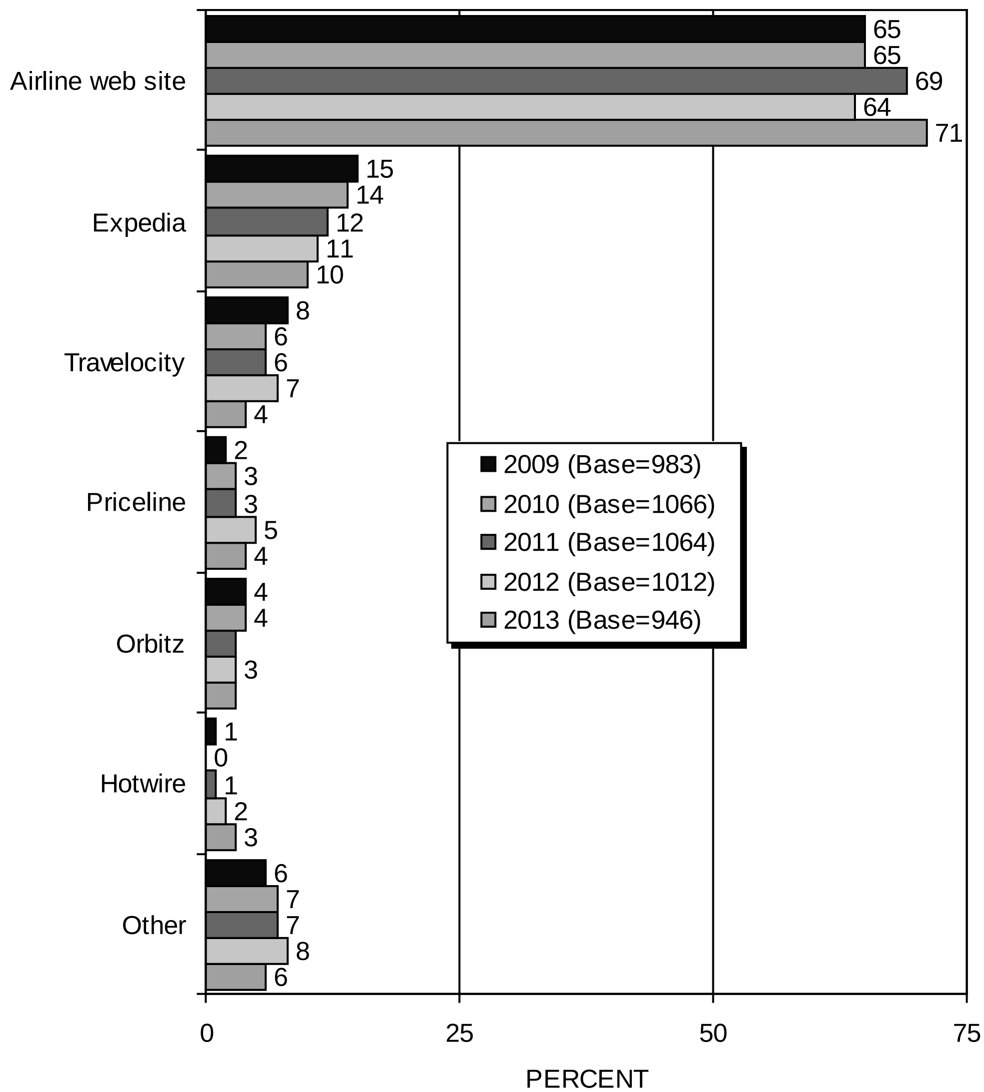
FIGURE 22
Internet Influence And Use*
(Among Those Who Used The Internet To Plan Trip)



Among visitors who used the Internet to plan their trip to Las Vegas, 41% said they booked their transportation online, down significantly from past years (Figure 22). Fifty-nine percent (59%) said they booked their accommodations online, also down significantly from prior years. Just over one-half (51%) said the Internet influenced their choice of accommodations, down from 58% in 2009. Two percent (2%) said the Internet influenced their decision to visit Las Vegas, up from 1% each from 2009 – 2011.

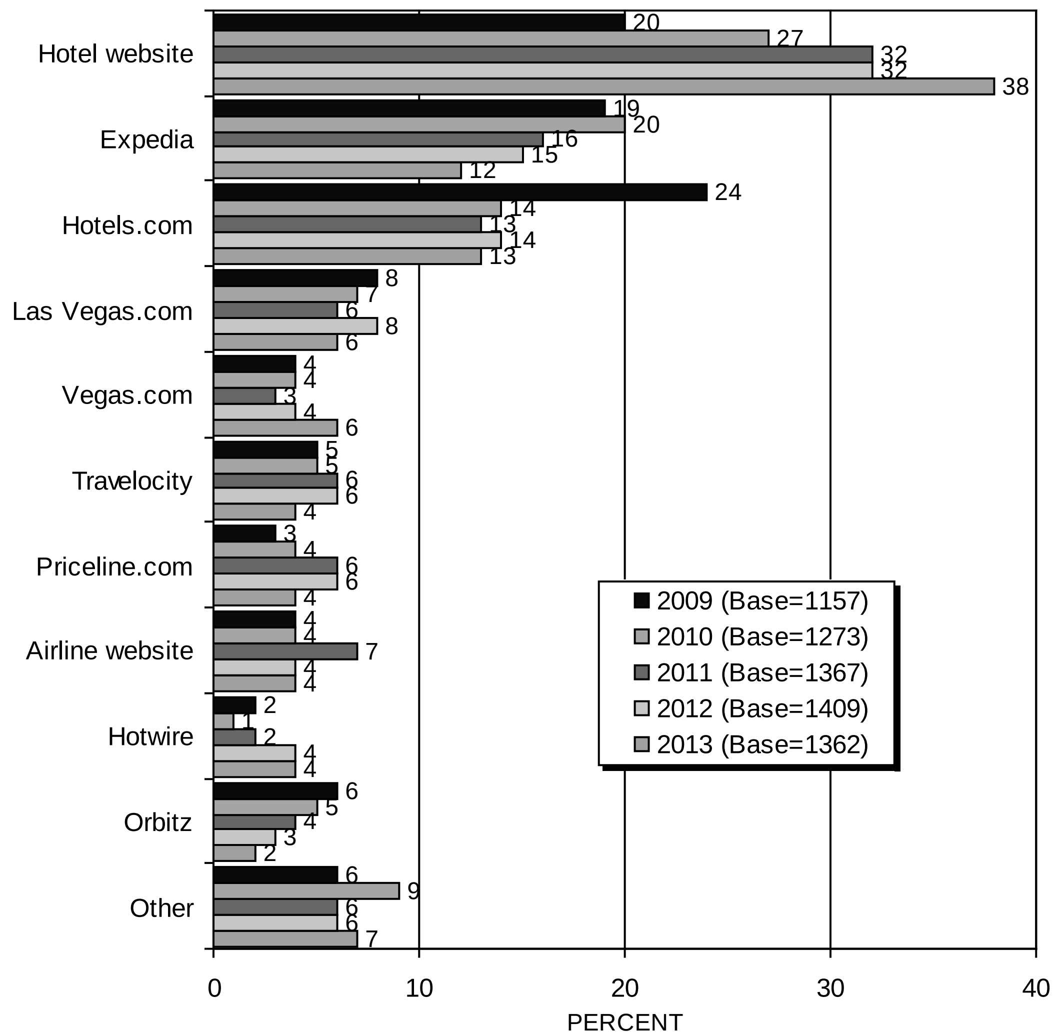
* Only “yes” responses are reported in this chart.

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



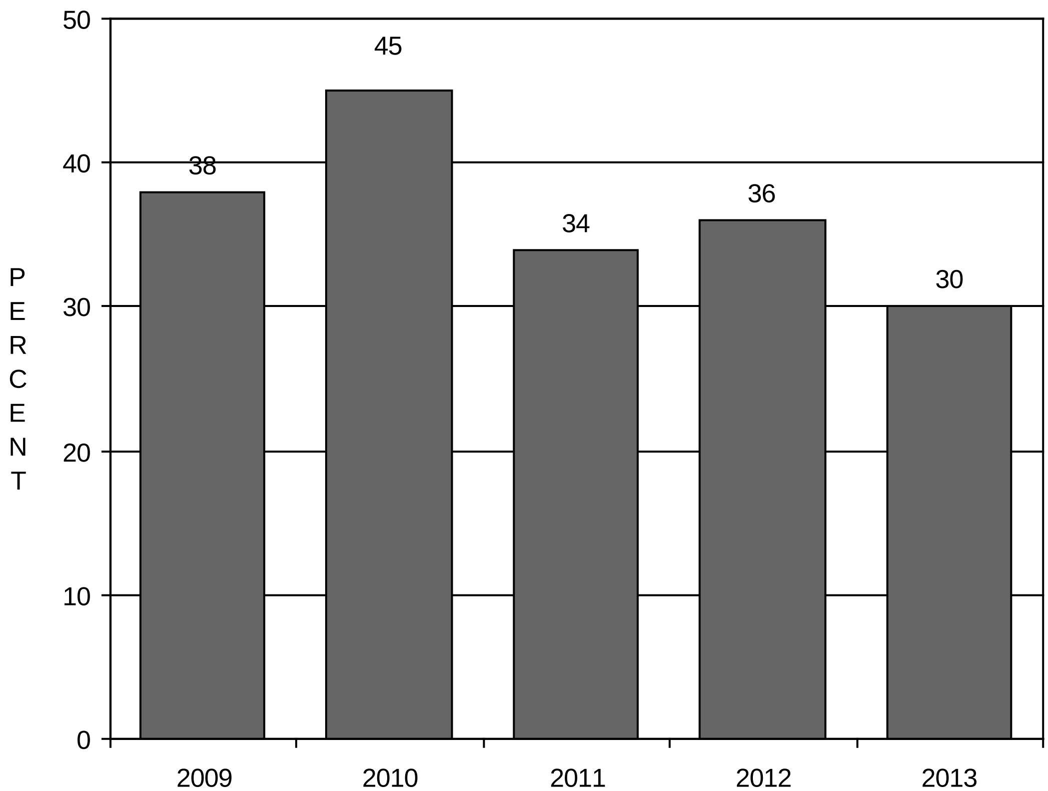
Among those who booked their transportation to Las Vegas online, more than seven in ten (71%) said they used an airline website, up significantly from 65% each in 2009 and 2010, and 64% in 2012 (Figure 23). Ten percent (10%) said they used Expedia, down significantly from 15% in 2009 and 14% in 2010. Four percent (4%) each used Travelocity (down from past years) or Priceline, while 3% each said Hotwire (up from 2009 – 2011 readings) or Orbitz (down from 4% each in 2009 and 2010).

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, 38% said they used a hotel website, up from 20% in 2009, 27% in 2010, and 32% each in 2011 and 2012 (Figure 24). Thirteen percent (13%) used Hotels.com (down from 24% in 2009), while 12% used Expedia (down significantly from 19% in 2009, 20% in 2010, and 16% in 2011). Six percent (6%) each used Vegas.com (up significantly from prior years) or LasVegas.com, 4% each used Travelocity, Hotwire.com (up from 1% in 2010 and 2% in 2011), or Priceline.com (down from 6% each in 2011 and 2012), while the remaining visitors used a variety of other websites.

FIGURE 25
Whether Visited Downtown Las Vegas*



Three in ten (30%) visitors said they had visited Downtown Las Vegas on their current trip, down significantly from 38% in 2009, 45% in 2010, 34% in 2011, and 36% last year (Figure 25).

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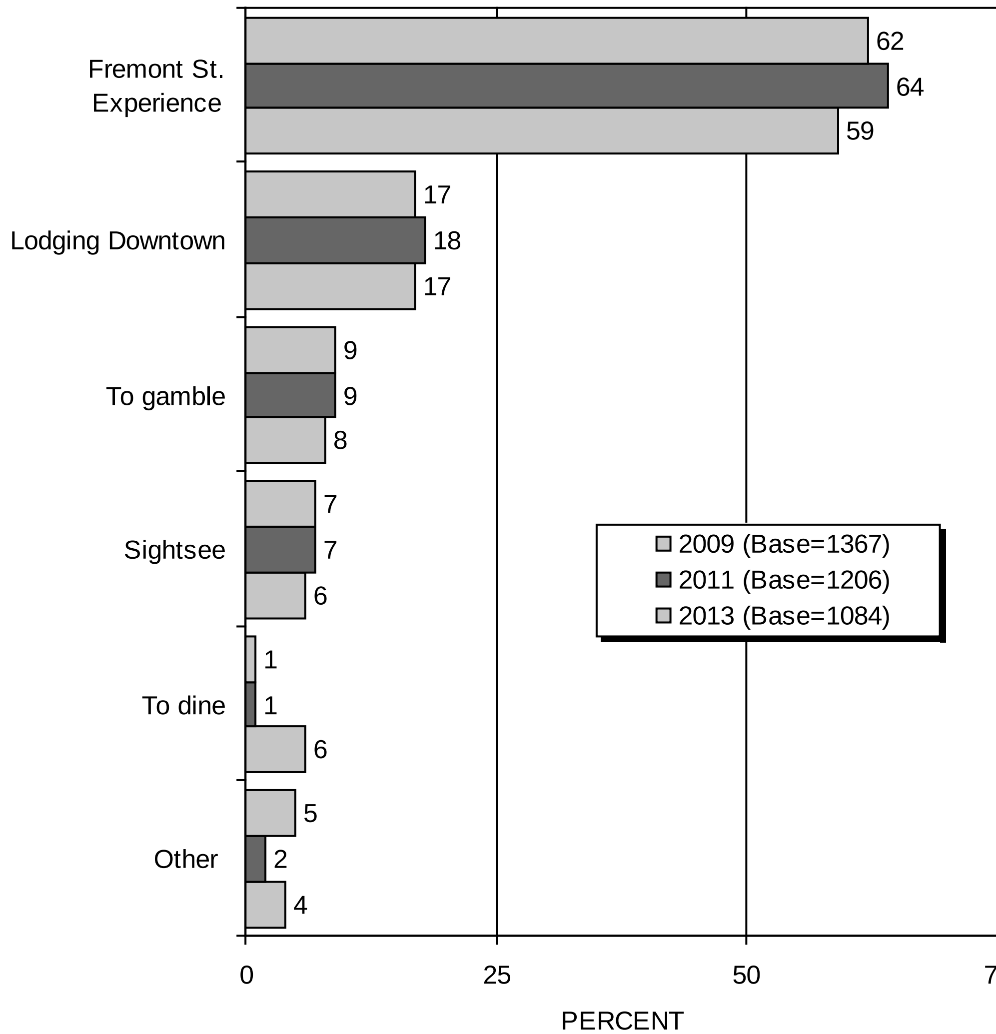
* Only "yes" responses are reported in this chart.

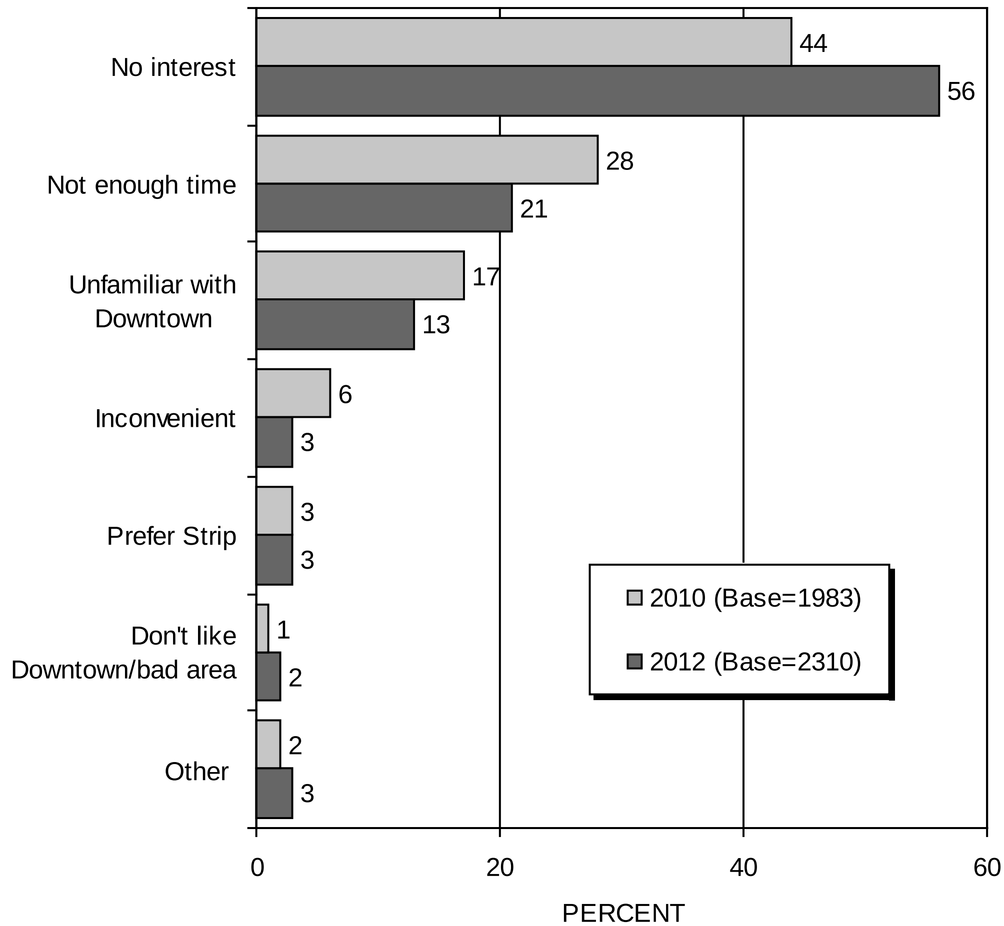
FIGURE 26
Main Reason For Visiting Downtown Las Vegas*
(Among Those Who Visited Downtown — Asked Every Other Year)



Visitors who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so (Figure 26). Nearly six in ten (59%) said it was to see the Fremont Street Experience. Seventeen percent (17%) said they were lodging Downtown, 8% said they went Downtown primarily to gamble, and 6% said they visited Downtown primarily to sightsee. The number who said they visited Downtown to dine was 6% (up significantly from 1% each in 2009 and 2011).

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

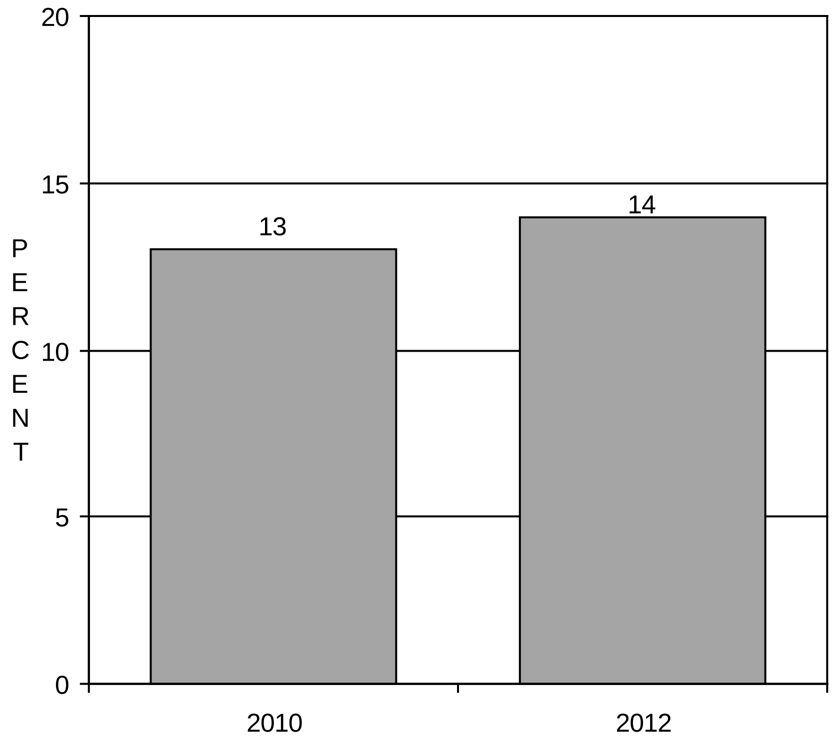
FIGURE 27
Main Reason For Not Visiting Downtown Las Vegas*
(Among Those Who Did Not Visit Downtown —
Asked Every Other Year)



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 44% in 2010. One in five (21%) said it was because they did not have enough time (down from 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 6% in 2010) or said they prefer the Strip area.

* This question is asked every other year and was not asked in 2009, 2011, or 2013.

FIGURE 28
Visits To Nearby Places*
(Asked Every Other Year)

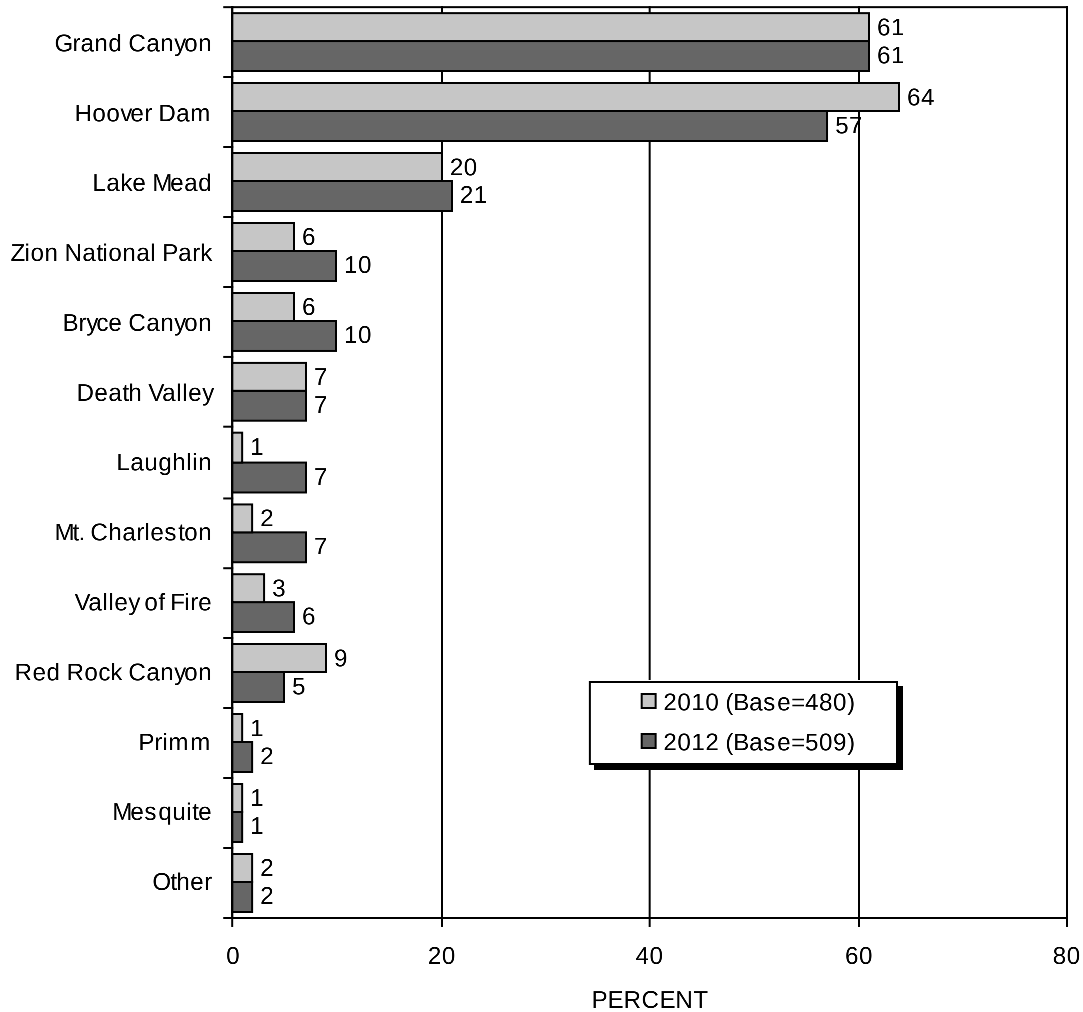


Visitors were asked if they visited any nearby places before or after their trip to Las Vegas (Figure 28) and 14% said they had.

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

This question is asked every other year and was not asked in 2009, 2011, or 2013.

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%), Hoover Dam (57%, down from 64% in 2010), and Lake Mead (21%). Ten percent (10%) said Zion National Park, another 10% said Bryce Canyon (up from 6% in 2010), while 7% each said Death Valley, Laughlin (up from 1% in 2010), and Mt. Charleston (up from 2% in 2010). 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, 2011, or 2013.

TRIP CHARACTERISTICS AND EXPENDITURES

Two-thirds (67%) of visitors traveled in parties of two, down significantly from 70% each in 2009 and 2011, and 69% in 2010 (Figure 30). Seven percent (7%) said they were in a party of three (up from 5% each in 2009 and 2010), while 12% were in a party of four (up from 9% each in 2009 and 2011), and 5% were in a party of five or more (up from 4% each in 2010 and 2011). Nine percent (9%) of visitors traveled alone, down from 11% in prior years. The average party size in 2013 was 2.4 persons, up significantly from 2.3 in 2011.

FIGURE 30
Adults In Immediate Party

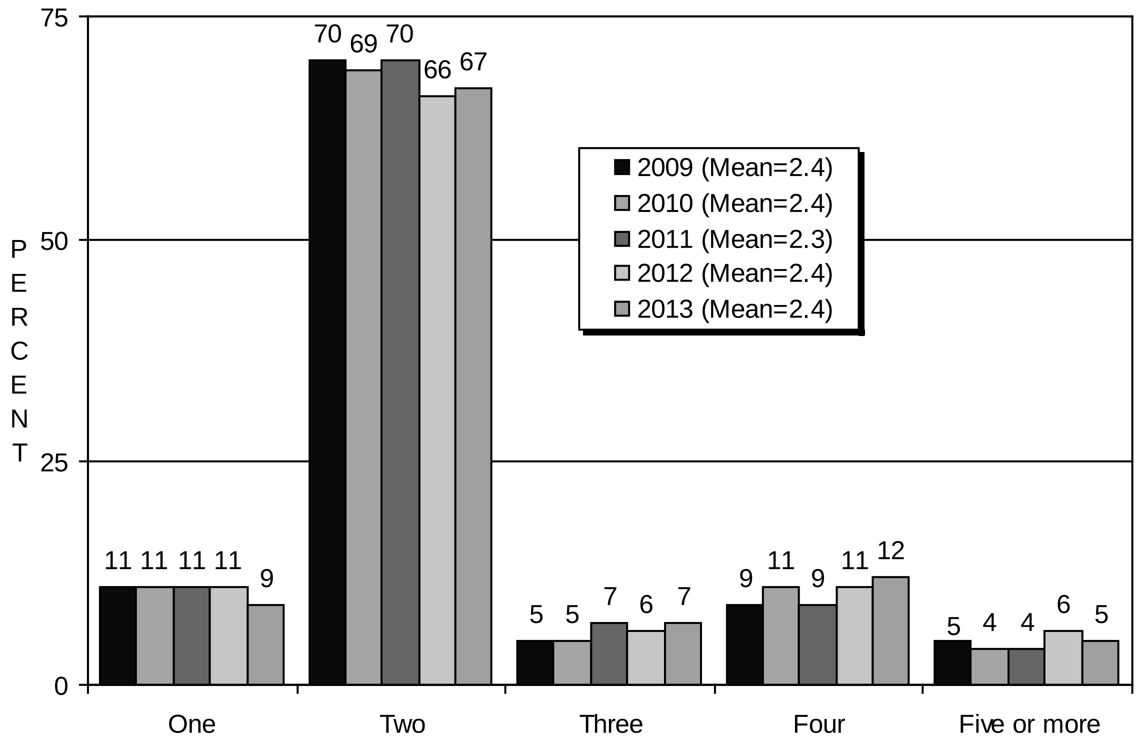
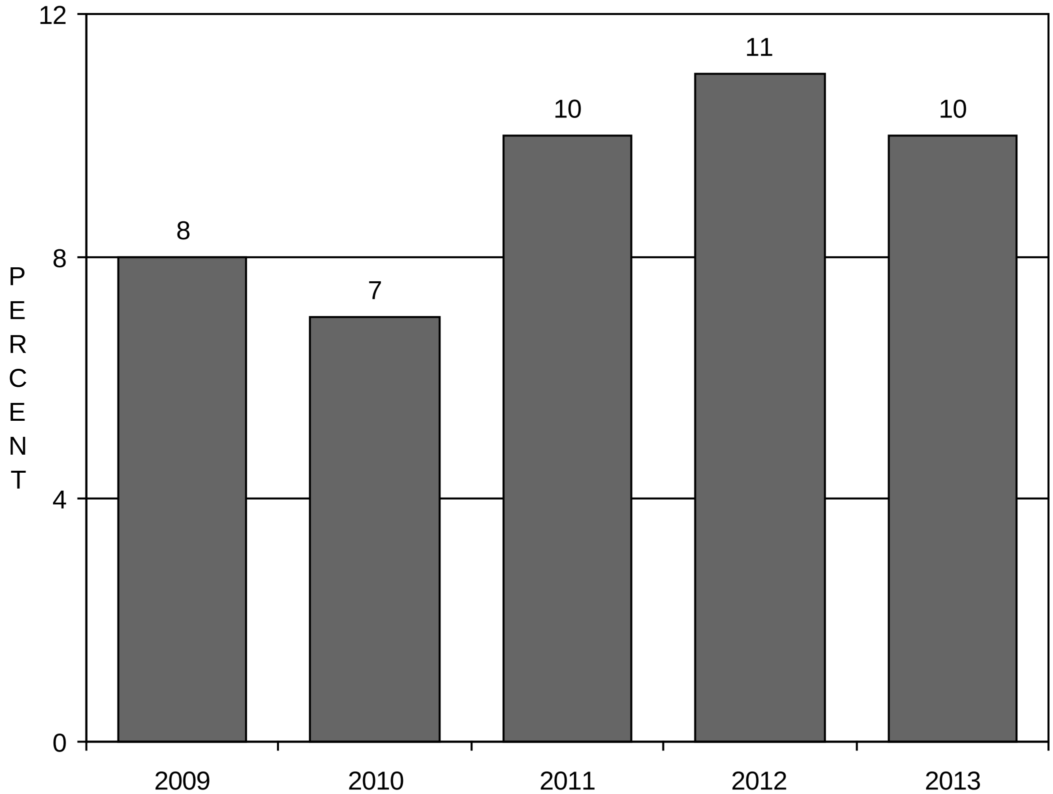


FIGURE 31
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 31). Ten percent (10%) said they did, up significantly from 8% in 2009 and 7% in 2010.

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

FIGURE 32
Nights Stayed*

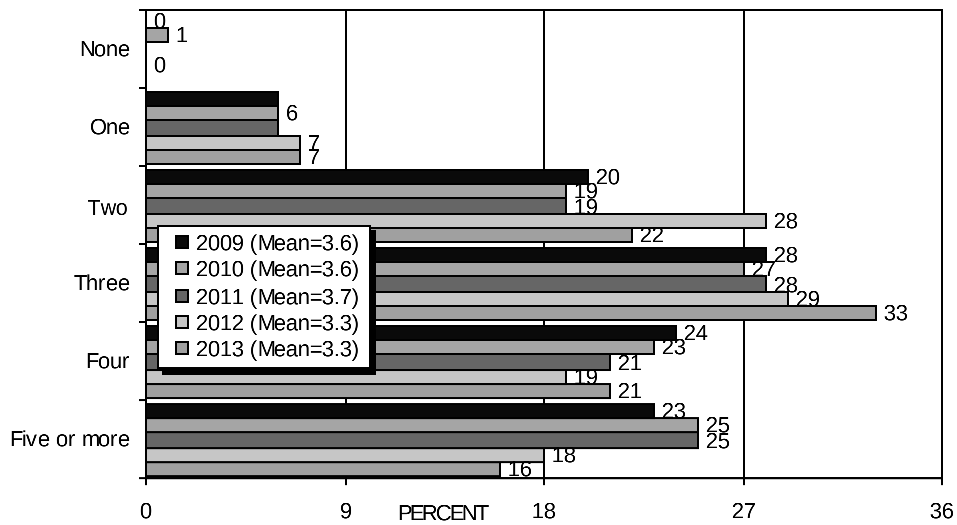
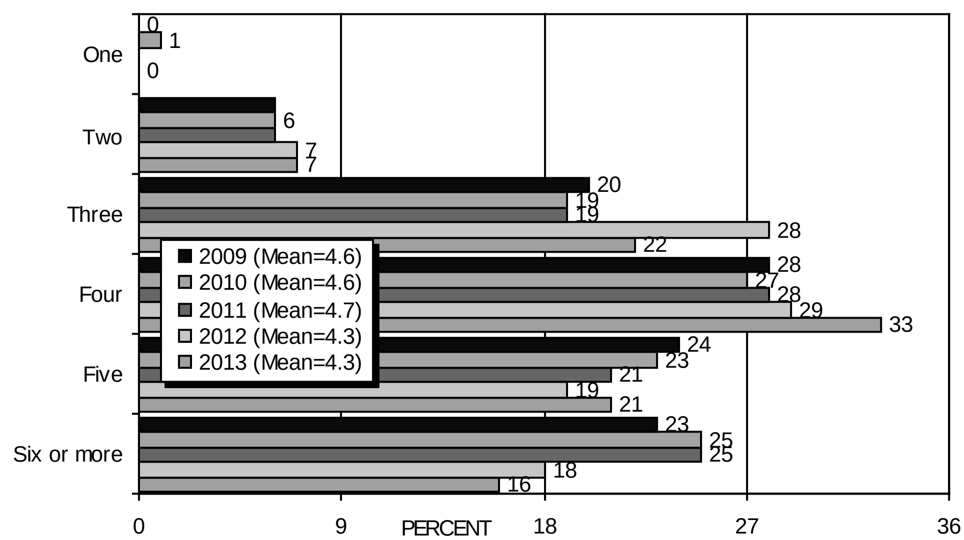


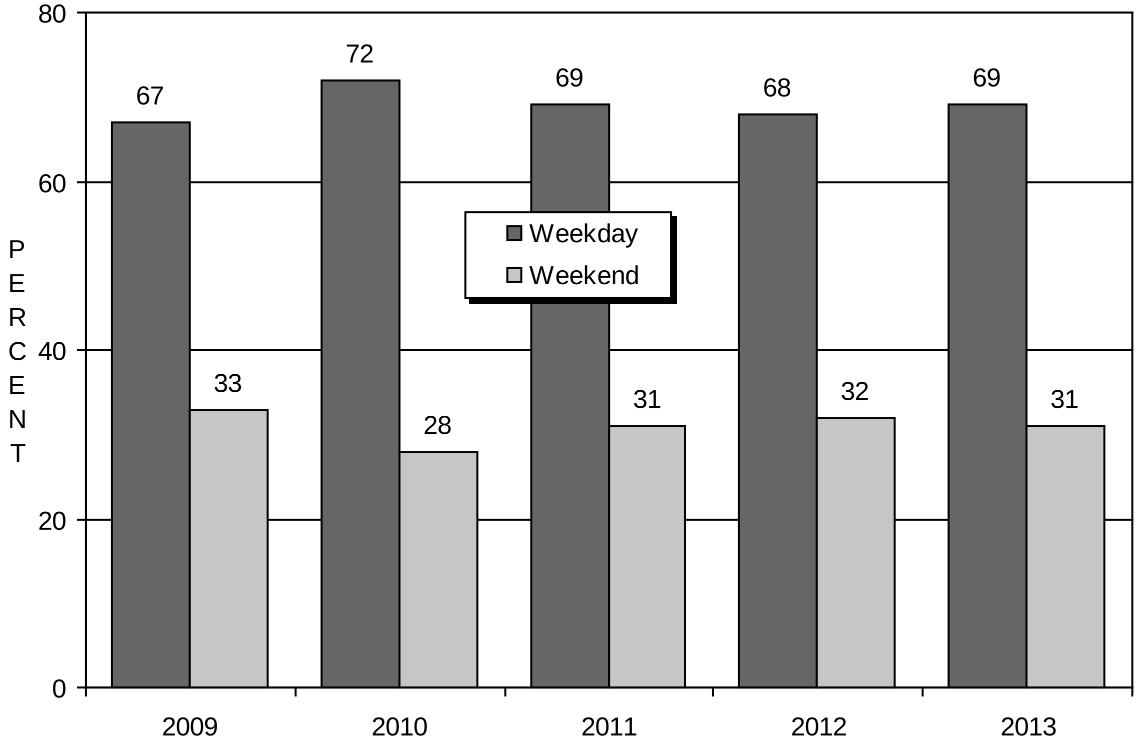
FIGURE 33
Days Stayed



In 2013, visitors stayed an average of 3.3 nights and 4.3 days in Las Vegas — the same as last year but down significantly from 3.6 nights and 4.6 days in 2009 and 2010, and 3.7 nights and 4.7 days in 2011 (Figures 32 and 33).

* Some changes in 2012 and 2013 data results may in part be due to updated methodology.

FIGURE 34
Weekend Versus Weekday Arrival*



Thirty-one percent (31%) of visitors arrived in Las Vegas on a weekend (up significantly from 28% in 2010), while 69% arrived on a weekday (down from 72% in 2010) (Figure 34).

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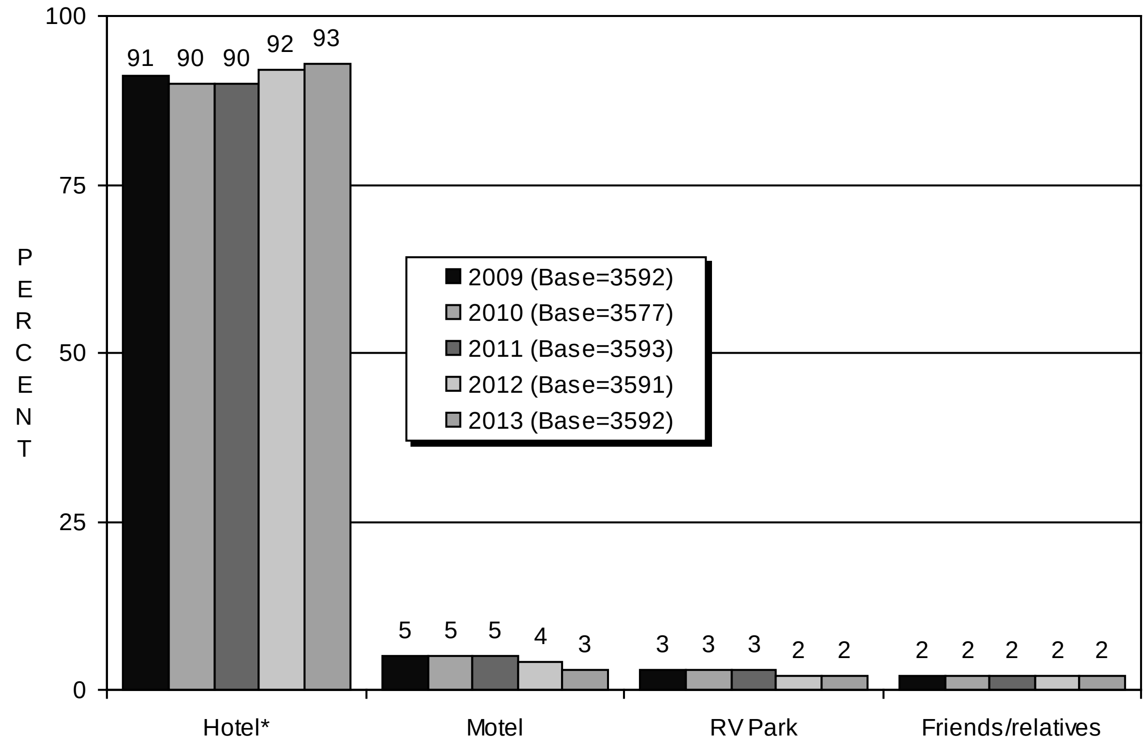
* *Weekday* is defined as Sunday through Thursday. *Weekend* is defined as Friday and Saturday.

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



Among visitors who stayed in Las Vegas overnight, 93% stayed in a hotel (up from 91% in 2009 and 90% each in 2010 and 2011), while 3% stayed in a motel (down from 5% each in 2009 – 2011). Two percent (2%) stayed in an RV park (down from 3% each in 2009 – 2011), and the remaining 2% stayed with friends or relatives (Figure 35).

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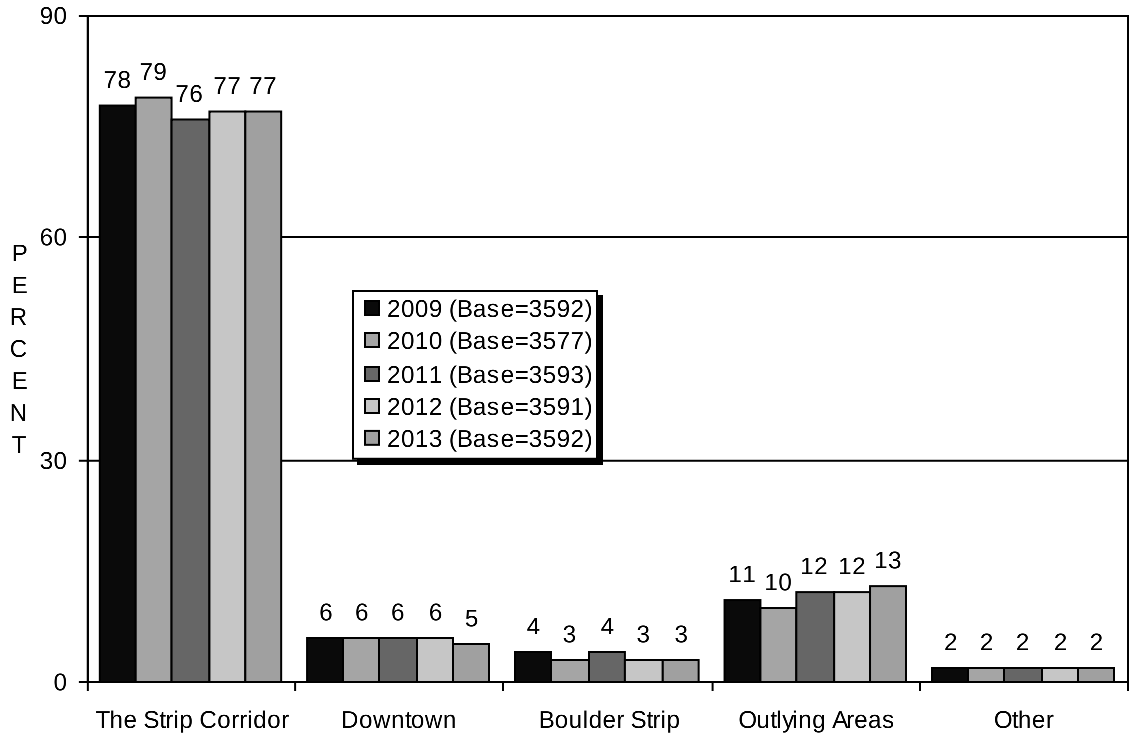
* Includes respondents who stayed in a time share.

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

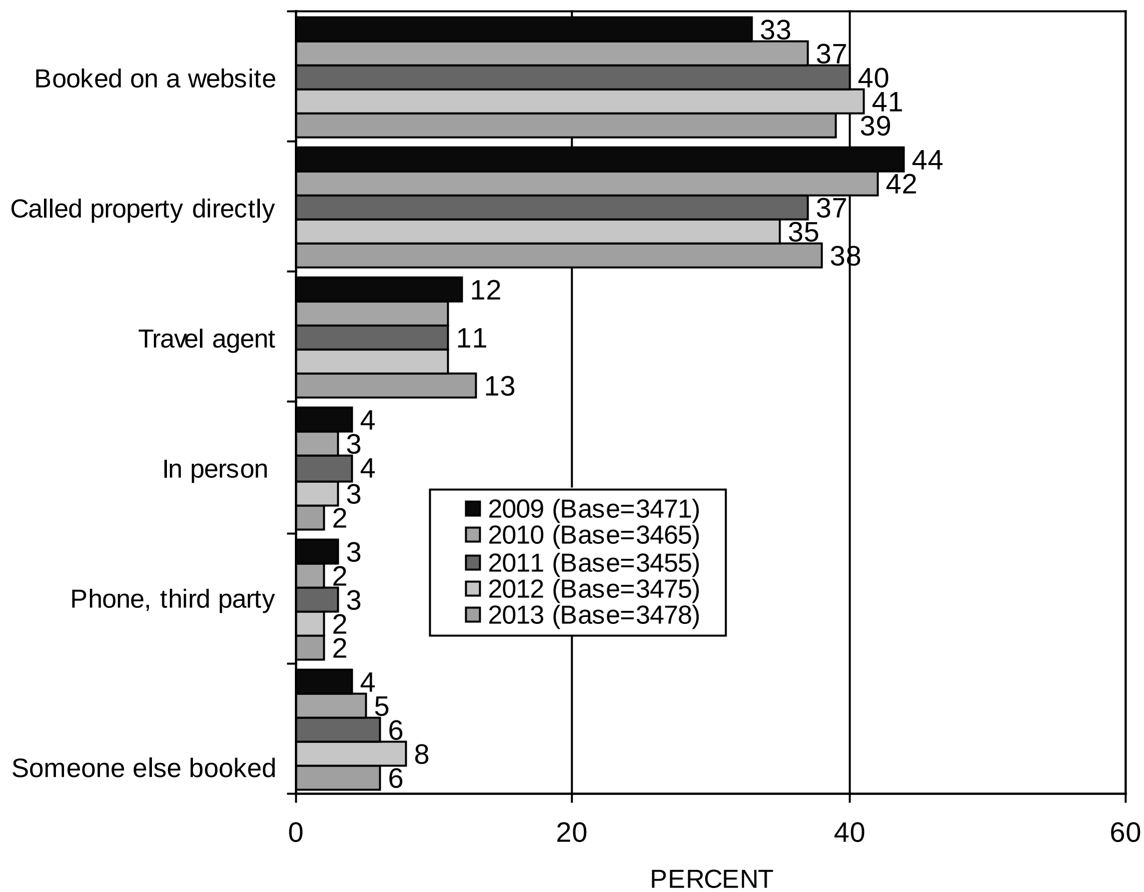


In terms of lodging location (among those who stayed overnight), 77% stayed in a property on the Strip Corridor*, 5% stayed Downtown, and 3% stayed on the Boulder Strip. Thirteen percent (13%) stayed in outlying parts of Las Vegas (up from 11% in 2009 and 10% in 2010), and 2% stayed in other areas (Figure 36).

---

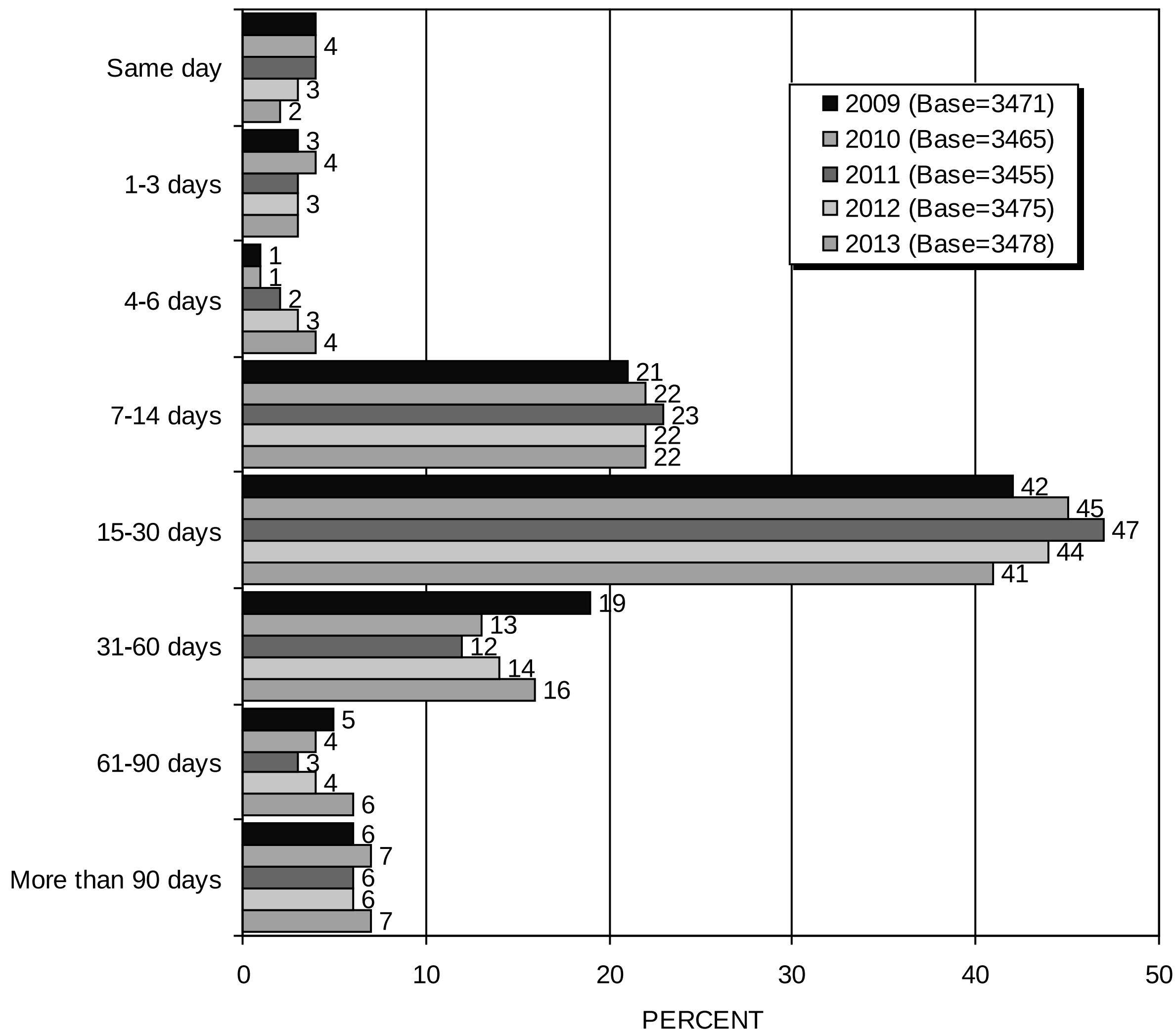
* The Strip Corridor includes properties located directly on Las Vegas Boulevard South, as well as properties near the Strip, between Valley View Road and Paradise Road.

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



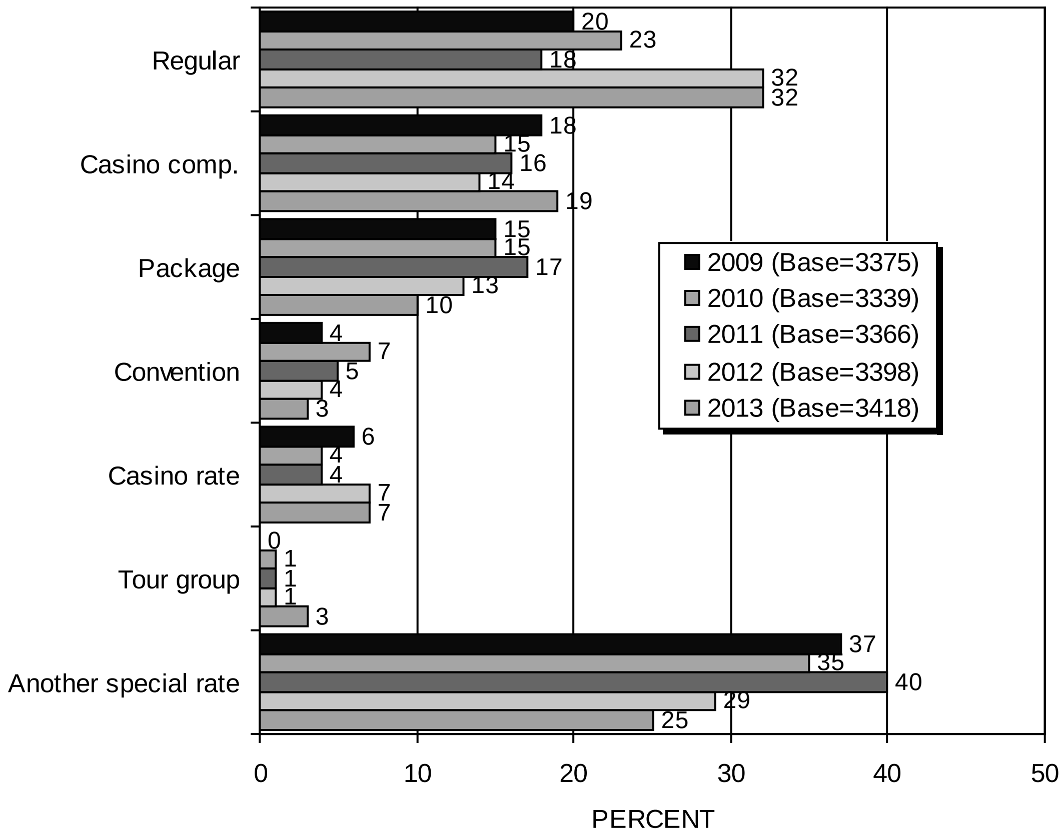
Visitors who stayed at a hotel, motel, or RV park were asked how they booked their accommodations in Las Vegas (Figure 37). In 2013, 39% said they used a website (up significantly from 33% in 2009), and 38% said they called the hotel, motel, or RV park directly (down significantly from 44% in 2009 and 42% in 2010 but up from 35% last year). Thirteen percent (13%) said they booked through a travel agent. Two percent (2%) each said they either booked in person (down from prior years) or 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 their accommodations (Figure 38). Sixty-three percent (63%) of these visitors booked one week to one month in advance, down from 67% in 2010, 70% in 2011, and 66% in 2012. Twenty-nine percent (29%) booked more than a month in advance, up significantly from 24% each in 2010 and 2012, and 21% in 2011. Nine percent (9%) reported making their reservations less than one week before arrival, up from 8% in 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. Nineteen percent (19%) received a casino complimentary rate (up from 15% in 2010, 16% in 2011, and 14% in 2012), while 7% paid a casino rate (up from 4% each 2010 and 2011). Ten percent (10%) of visitors paid a package rate (down significantly from prior years), while 3% received a tour group rate (up significantly from past years). Three percent (3%) paid a convention rate (down from 7% in 2010 and 5% in 2011). The remaining 25% paid some other kind of special rate, down significantly from 2009 – 2012 readings.

* 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 (2013)

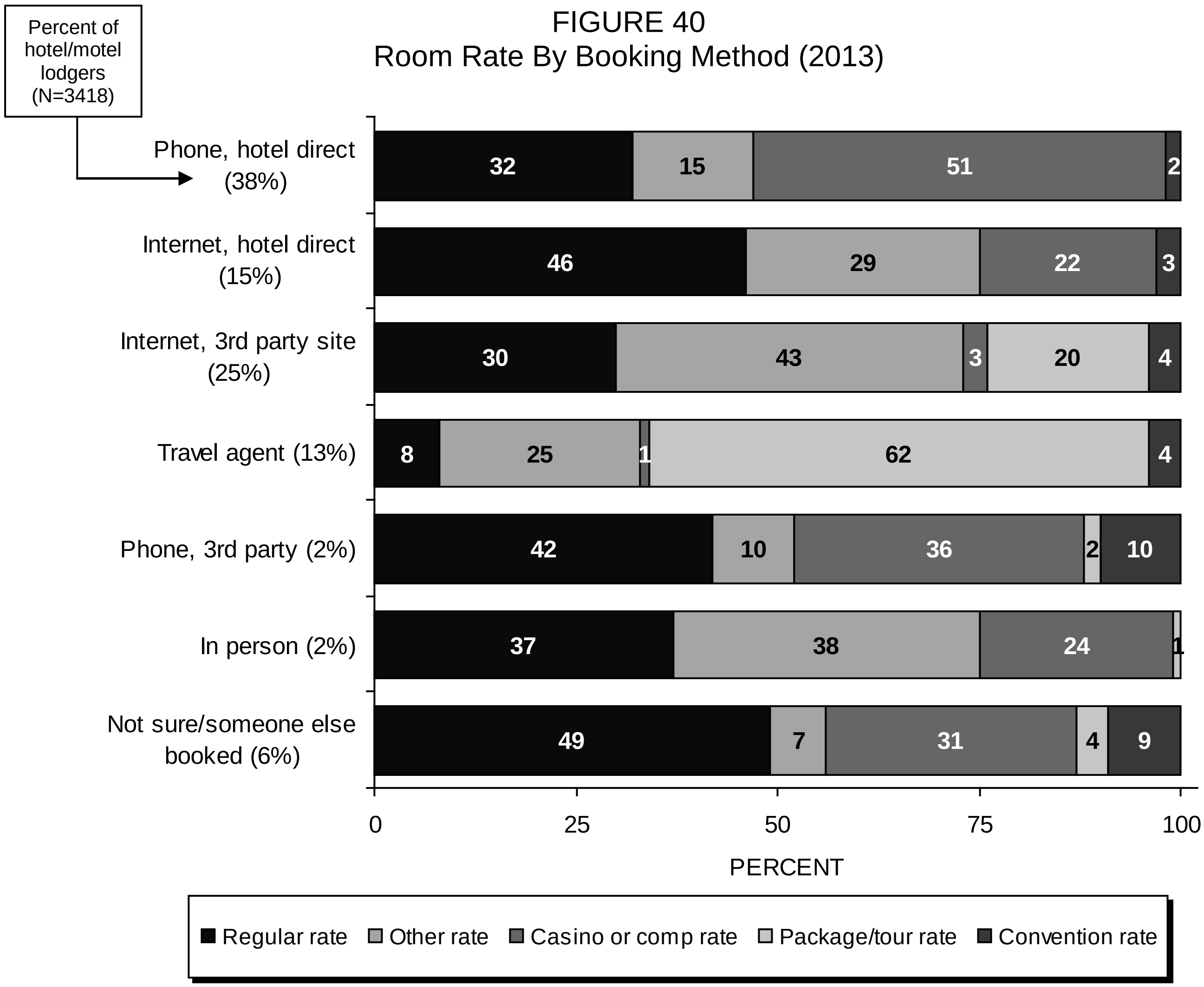
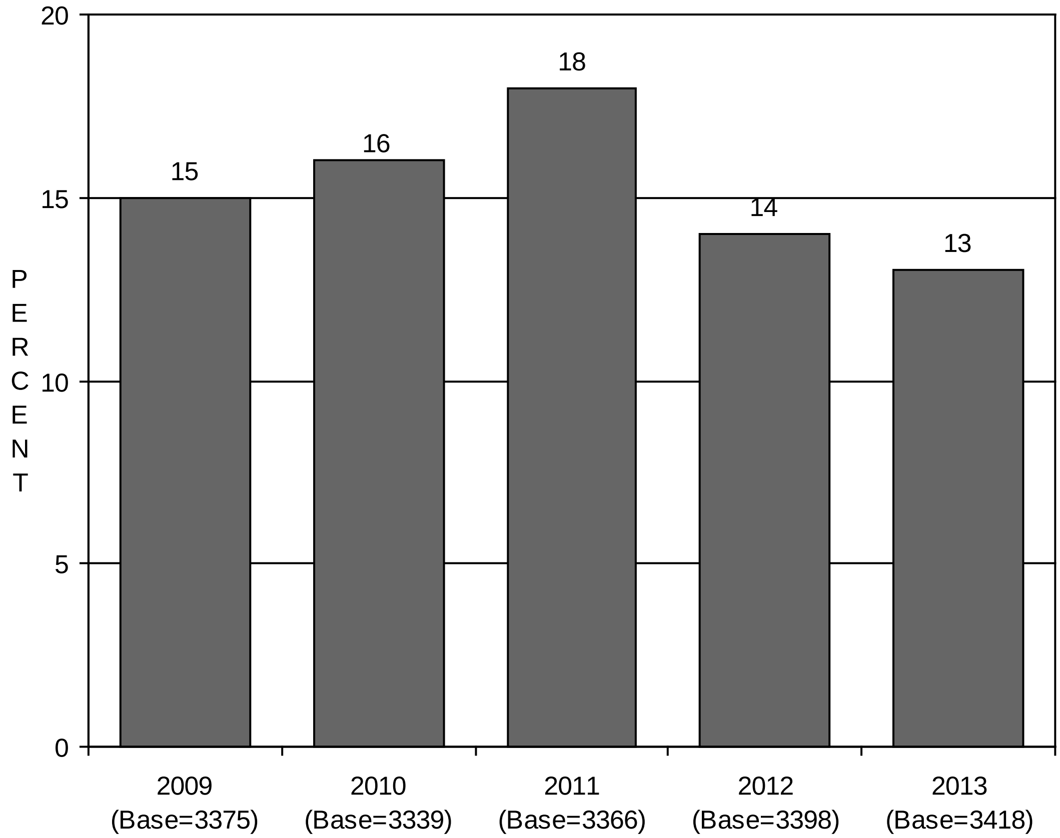


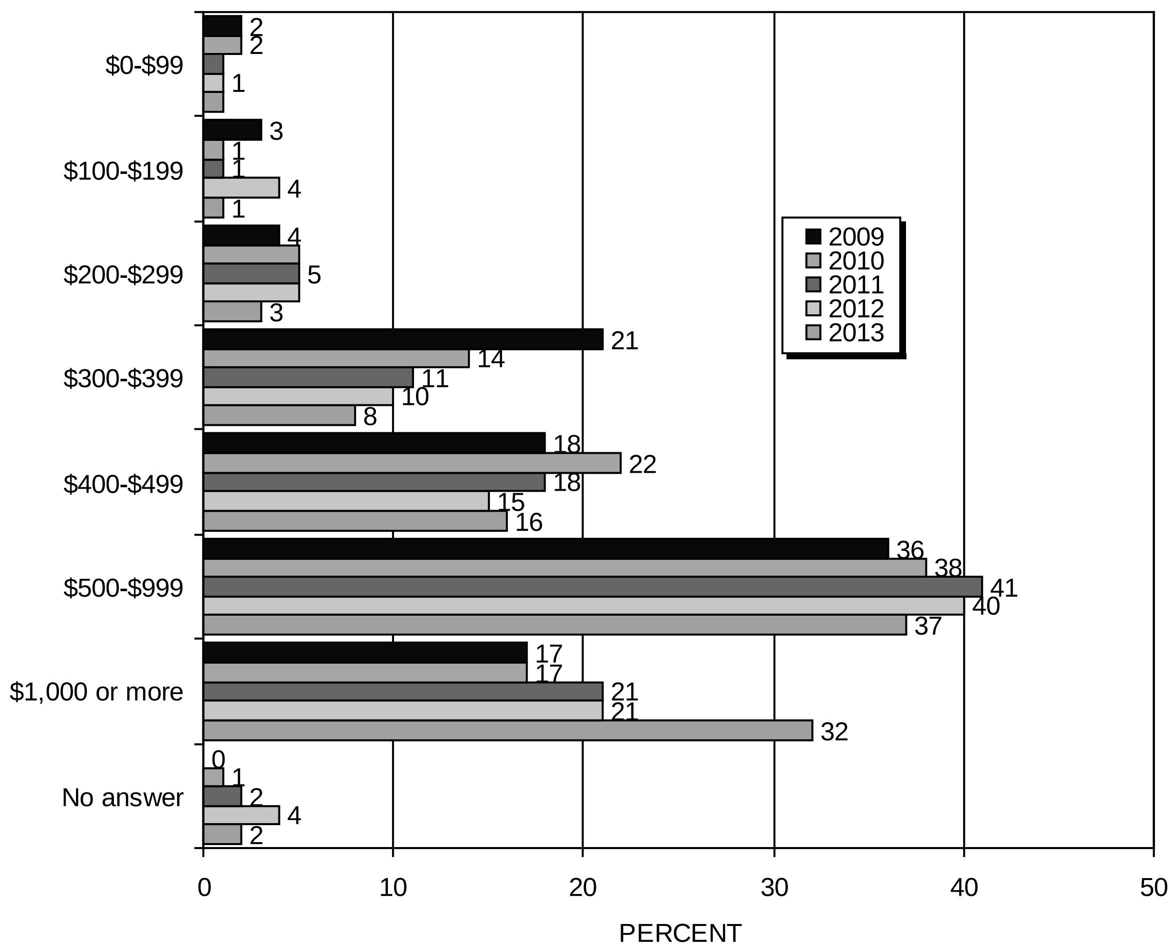
Figure 40 shows the room rate category by the booking method for 2013 among those staying in a hotel or motel. Of those who called the hotel directly, just over one-half (51%) received a casino or casino complimentary rate, while one-third (32%) received a regular rate, and 15% received a special rate. Of those who booked their room on the Internet through a third-party site, 43% received a special room rate, 30% received a regular rate, and 20% received a package rate. Among those who booked directly on a hotel website, 46% received a regular room rate, 29% received a special rate, and 22% received a casino or casino complimentary rate. More than six in ten (62%) of those who booked through a travel agent received a package rate, while one-quarter (25%) received a special rate. Among those who booked in person, 38% received a special rate, 37% received a regular rate, and 24% received a casino or casino complimentary rate. Among those who booked through a third party by phone, 42% received a regular rate, 36% received a casino or casino complimentary rate, while 10% each received a convention rate or a regular rate.

FIGURE 41
Package Purchasers
(Among Those Staying In A Hotel Or Motel)



Thirteen percent (13%) of visitors purchased a package deal or were part of a tour group, down significantly from 16% in 2010 and 18% in 2011 (Figure 41).

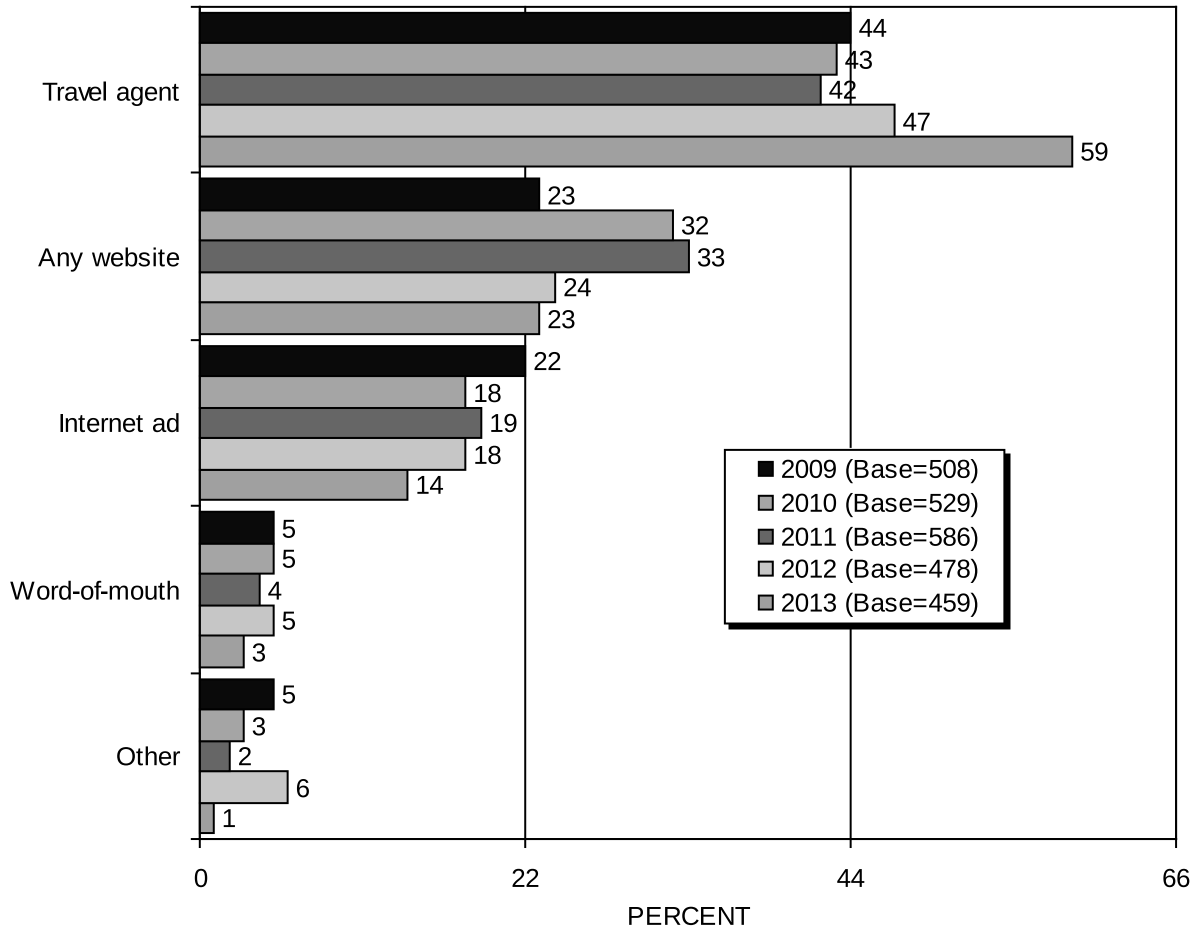
FIGURE 42
Cost Of Package Per Person
(Among Those Who Bought A Package)



Means: 2009=$640.29; 2010=$651.02; 2011=$757.83; 2012=$743.65; 2013=$868.24
Base Sizes: 2009=508; 2010=529; 2011=586; 2012=478; 2013=459

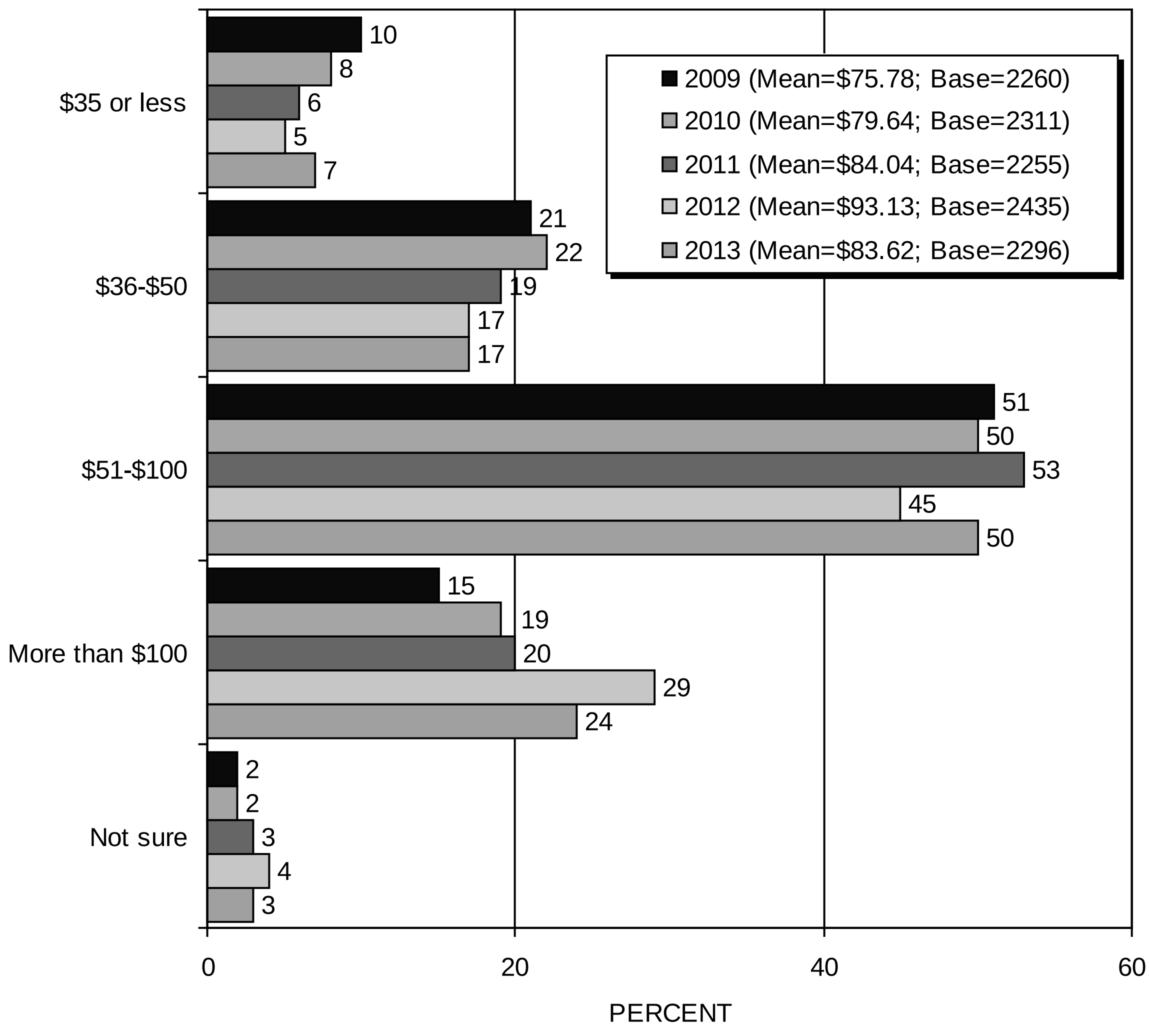
We asked those who had purchased a hotel, airline, or a tour/travel group package how much their packages cost per person (Figure 42). The average cost of such a package in 2013 was $868.24, up significantly from $640.29 in 2009, $651.02 in 2010, $757.83 in 2011, and $743.65 in 2012.

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



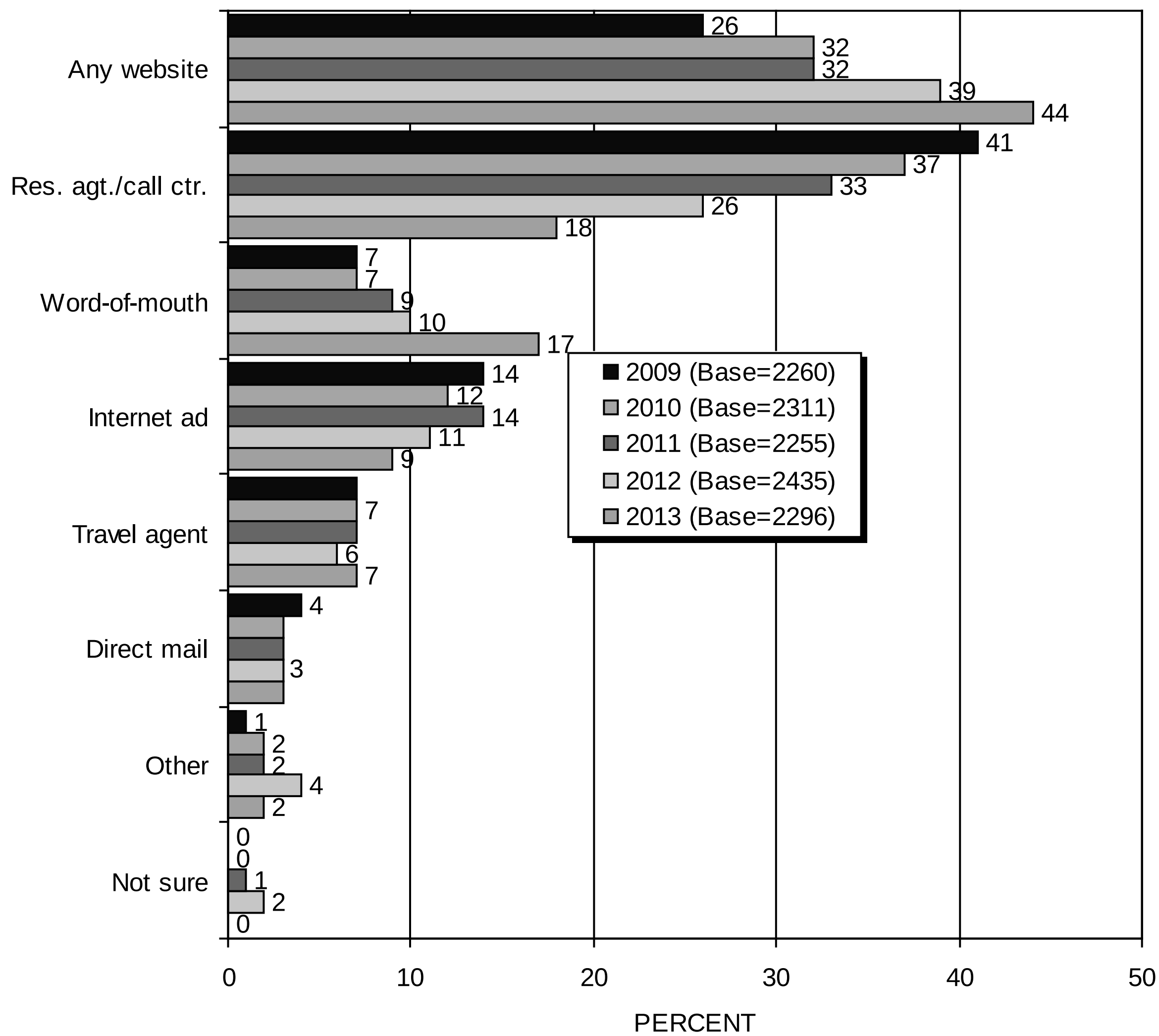
Package purchasers were asked where they first heard about the package they bought (Figure 43), and nearly six in ten (59%) said it was from a travel agent, up significantly from 2009 – 2012 readings. Twenty-three percent (23%) mentioned a website (down from 32% in 2010 and 33% in 2011), while 14% said an Internet ad (down from 22% in 2009 and 19% in 2011), and 3% said through word of mouth.

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



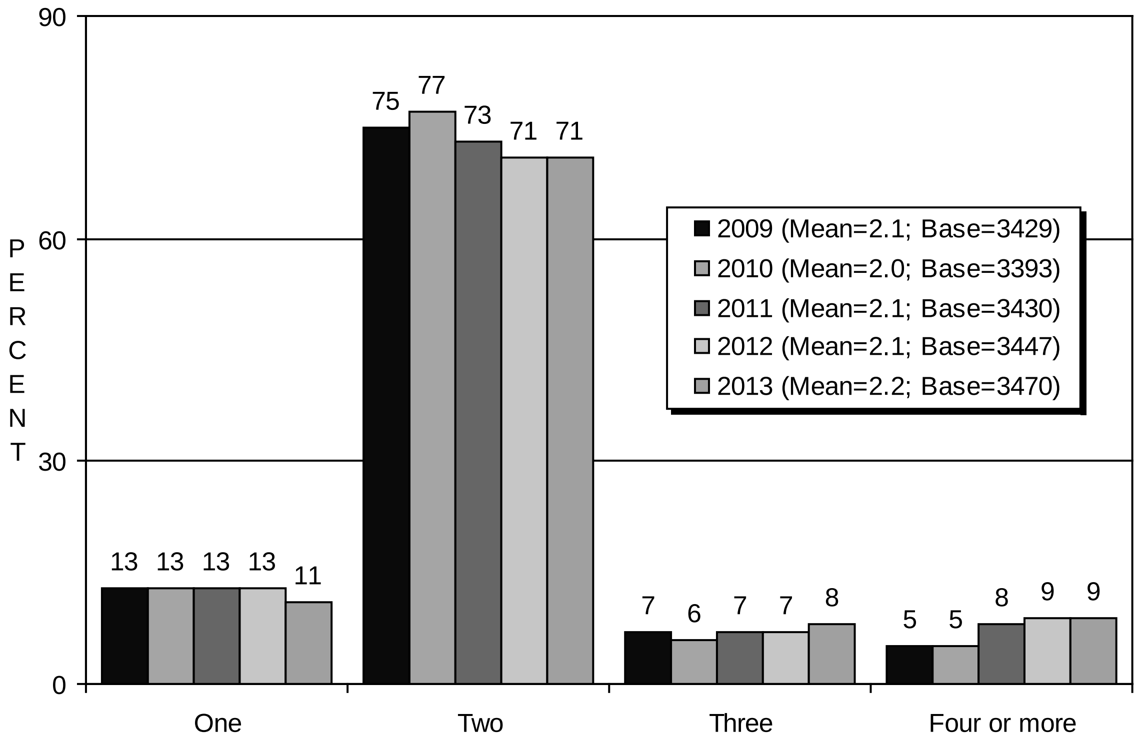
We looked at lodging expenditures among those who did *not* purchase travel packages and were not comped for their stay (Figure 44). One-half (50%) of these non-package visitors paid between $51 and $100 per night for their room, up from 45% last year. Nearly one-quarter (24%) paid more than $100 per night, down from 29% last year, but up from 15% in 2009, 19% in 2010, and 20% in 2011. Seventeen percent (17%) paid between $36 and $50 (down from 21% in 2009 and 22% in 2010), while 7% paid $35 or less (down from 10% in 2009 but up from 5% last year). The average daily room rate for non-package visitors in 2013 was $83.62, down from $93.13 last year, but up from $75.78 in 2009 and $79.64 in 2010.

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



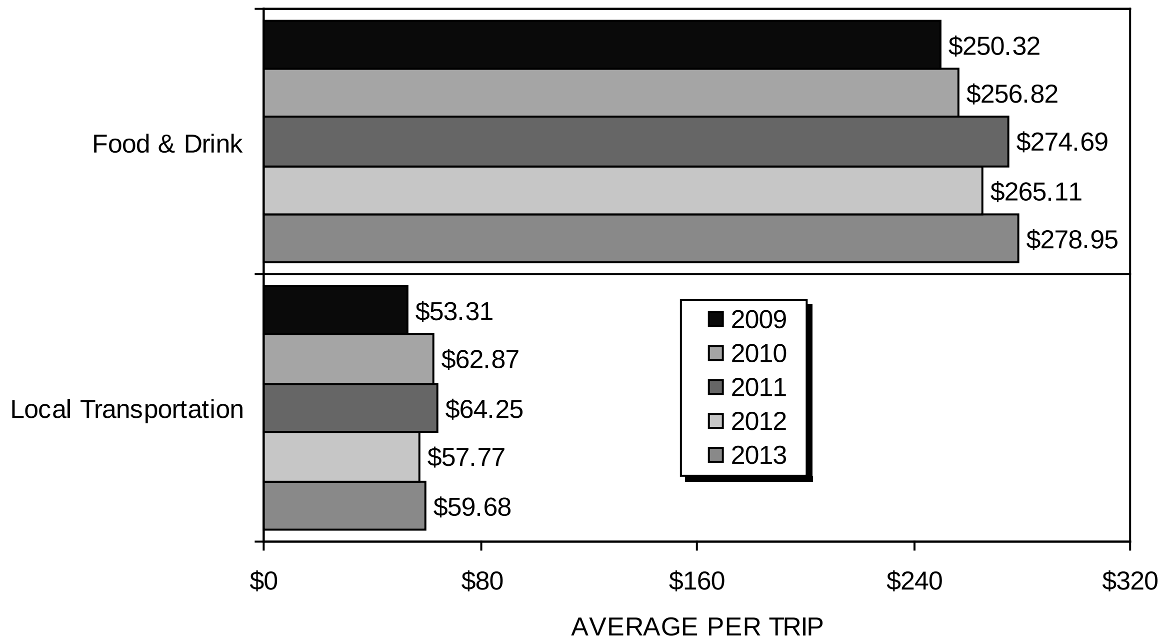
Non-package hotel or motel lodgers were asked how they first found out about the room rate they paid (Figure 45). More than four in ten (44%) mentioned a website, up significantly from 26% in 2009, 32% each in 2010 and 2011, and 39% in 2012. Eighteen percent (18%) said it was through a reservation agent or call center, down significantly from 41% in 2009, 37% in 2010, 33% in 2011, and 26% last year. Seventeen percent (17%) mentioned word-of-mouth (up from 7% each in 2009 and 2010, 9% in 2011, and 10% last year), while 9% mentioned an Internet ad (down from 14% each in 2009 and 2011, 12% in 2010, and 11% last year), 7% mentioned a travel agent, and 3% mentioned direct mail (down from 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 significantly from 75% in 2009 and 77% in 2010) said two people stayed in their room (Figure 46). Eleven percent (11%) said they were lodging alone (down from previous years), 8% said three people stayed in their room (up from previous years), while 9% said four or more people stayed in their room (up from 5% each in 2009 and 2010, and 8% in 2011). The mean (average) number of room occupants was 2.2, up from prior years.

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



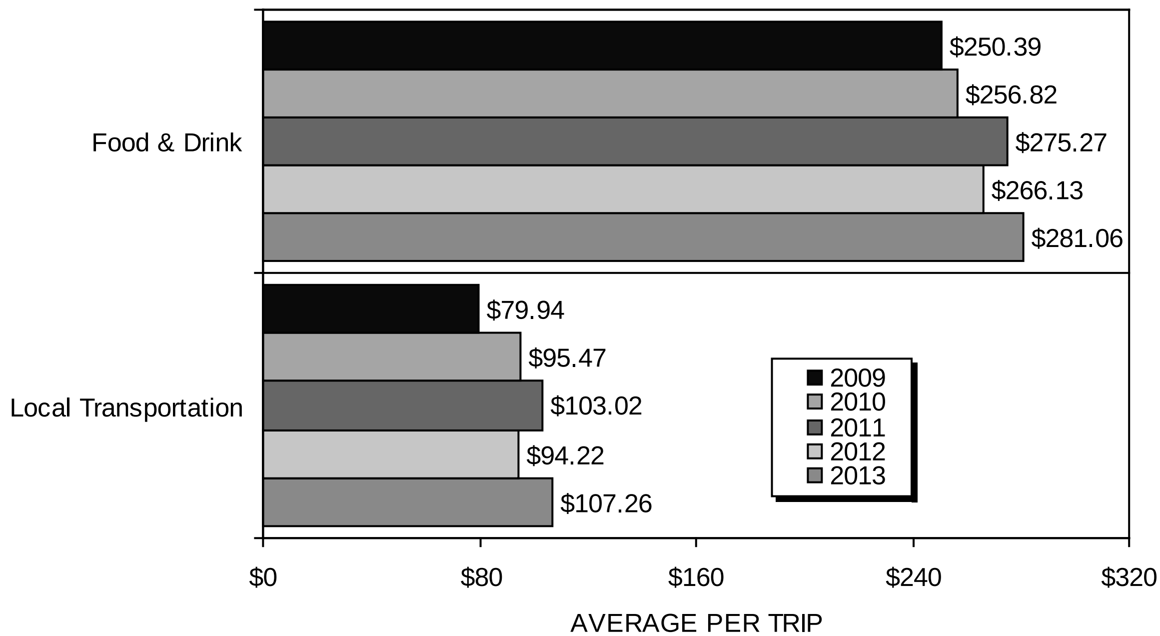
We asked all visitors about their daily expenditures on food and drink and on local transportation.

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 2013 was $278.95, up significantly from $250.32 in 2009, $256.82 in 2010, and $265.11 in 2012.

The average transportation expenditure for 2013 was $59.68, up significantly from $53.31 in 2009.

* 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 2013 was $281.06, up significantly from $250.39 in 2009, $256.82 in 2010, and $266.13 last year (Figure 48). The average trip expenditure on local transportation for 2013 was $107.26, up significantly from $79.94 in 2009, $95.47 in 2010, and $94.22 last year.

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

	2009	2010	2011	2012	2013
Food and Drink					
Base size	(3598)	(3601)	(3592)	(3588)	(3573)
Proportion of total	100.0%	100.0%	99.8%	99.6%	99.2%
Local Transportation					
Base size	(2400)	(2372)	(2246)	(2209)	(2004)
Proportion of total	67%	66%	62%	61%	56%

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

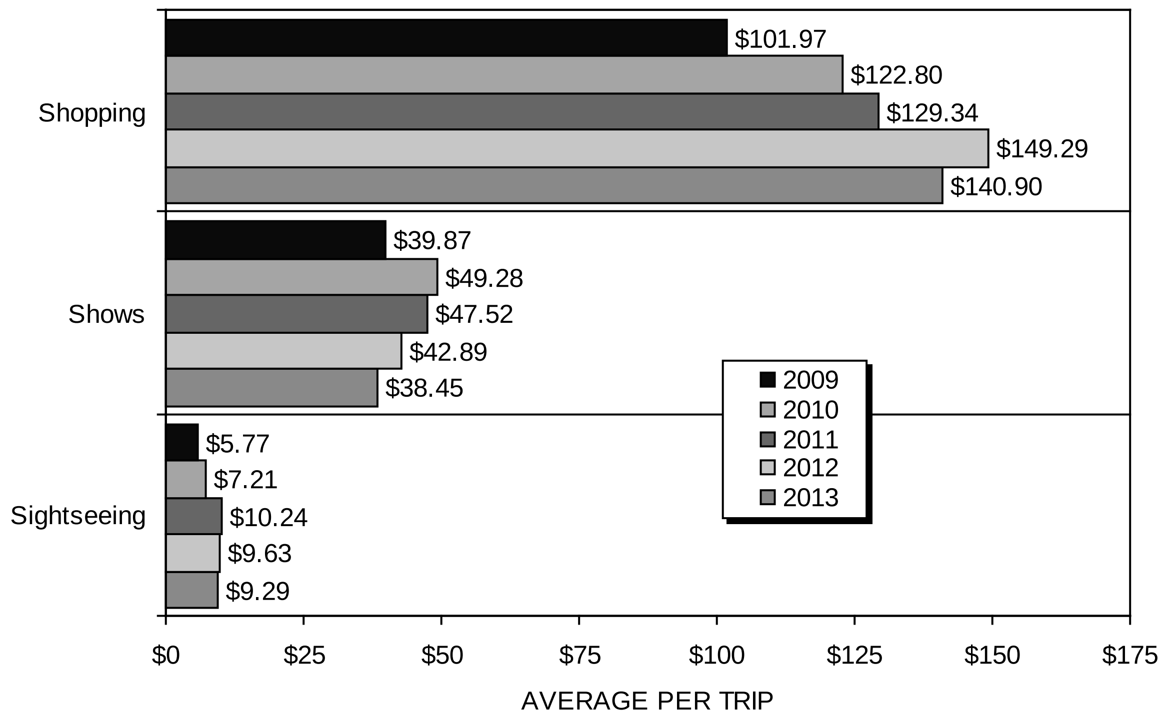
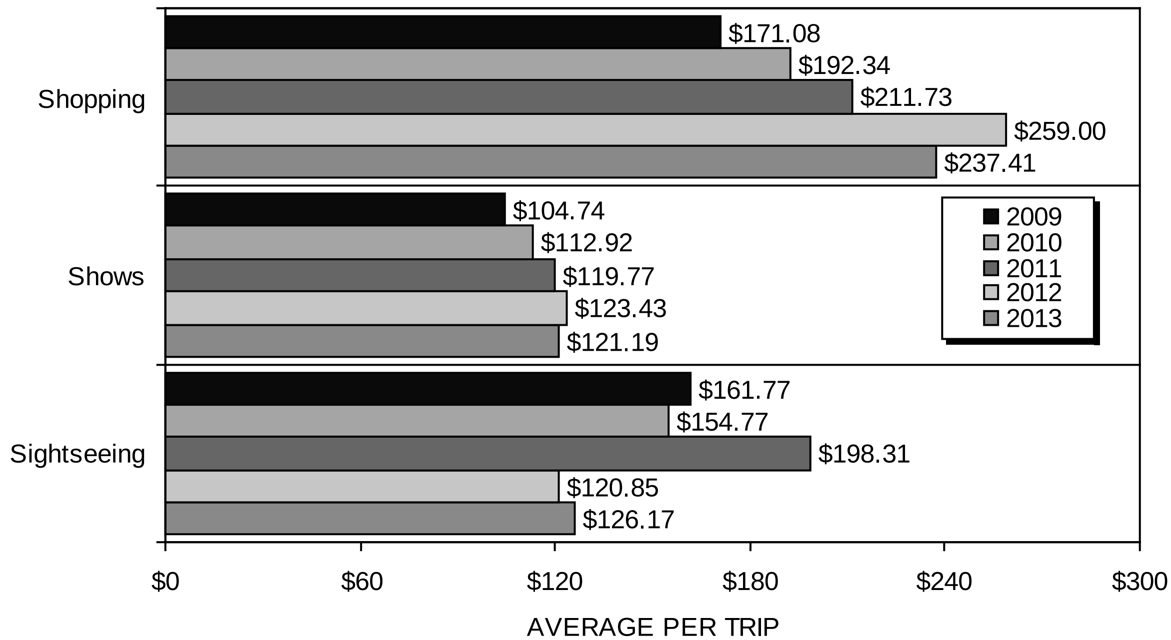


Figure 49 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas — *including visitors who said they spent nothing* in these categories. The average trip expenditure on shopping was $140.90, up significantly from $101.97 in 2009 and $122.80 in 2010. The average expenditure on shows was $38.45, down from $49.28 in 2010, $47.52 in 2011, and $42.89 last year. The average expenditure on sightseeing was $9.29, up from $5.77 in 2009.

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 $237.41, up significantly from $171.08 in 2009, $192.34 in 2010, and $21.73 in 2011 (Figure 50). The average trip total spent on shows was $121.19, up from $104.74 in 2009 and $112.92 in 2010. The sightseeing total was $126.17, down significantly from $161.77 in 2009 and $198.31 in 2011.

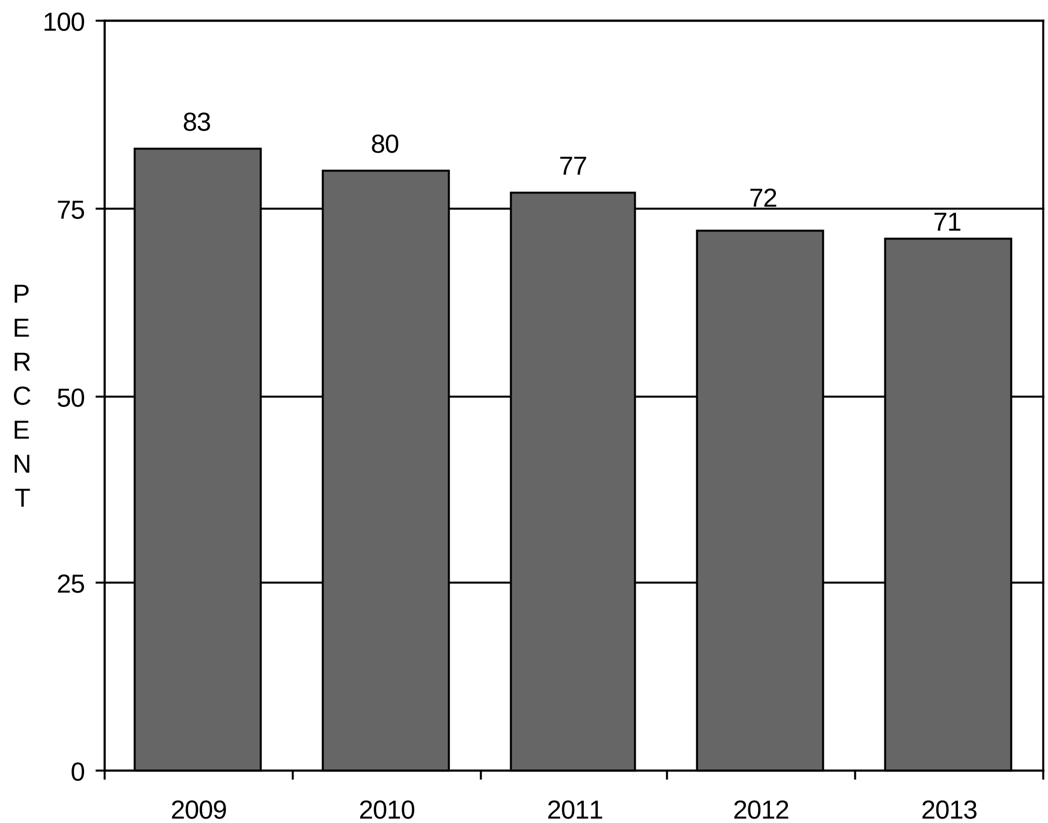
† Percentages of respondents who spent money in each category are shown in the following table:

	2009	2010	2011	2012	2013
Shopping					
Base size	(2145)	(2302)	(2201)	(2077)	(2138)
Proportion of total	61%	64%	61%	58%	59%
Shows					
Base size	(1370)	(1573)	(1429)	(1255)	(1143)
Proportion of total	44%	44%	40%	35%	32%
Sightseeing					
Base size	(128)	(168)	(186)	(287)	(266)
Proportion of total	5%	5%	5%	8%	7%

GAMING BEHAVIOR AND BUDGETS

Seventy-one percent (71%) of all visitors said they gambled while in Las Vegas, down significantly from 83% in 2009, 80% in 2010, and 77% in 2011 (Figure 51).

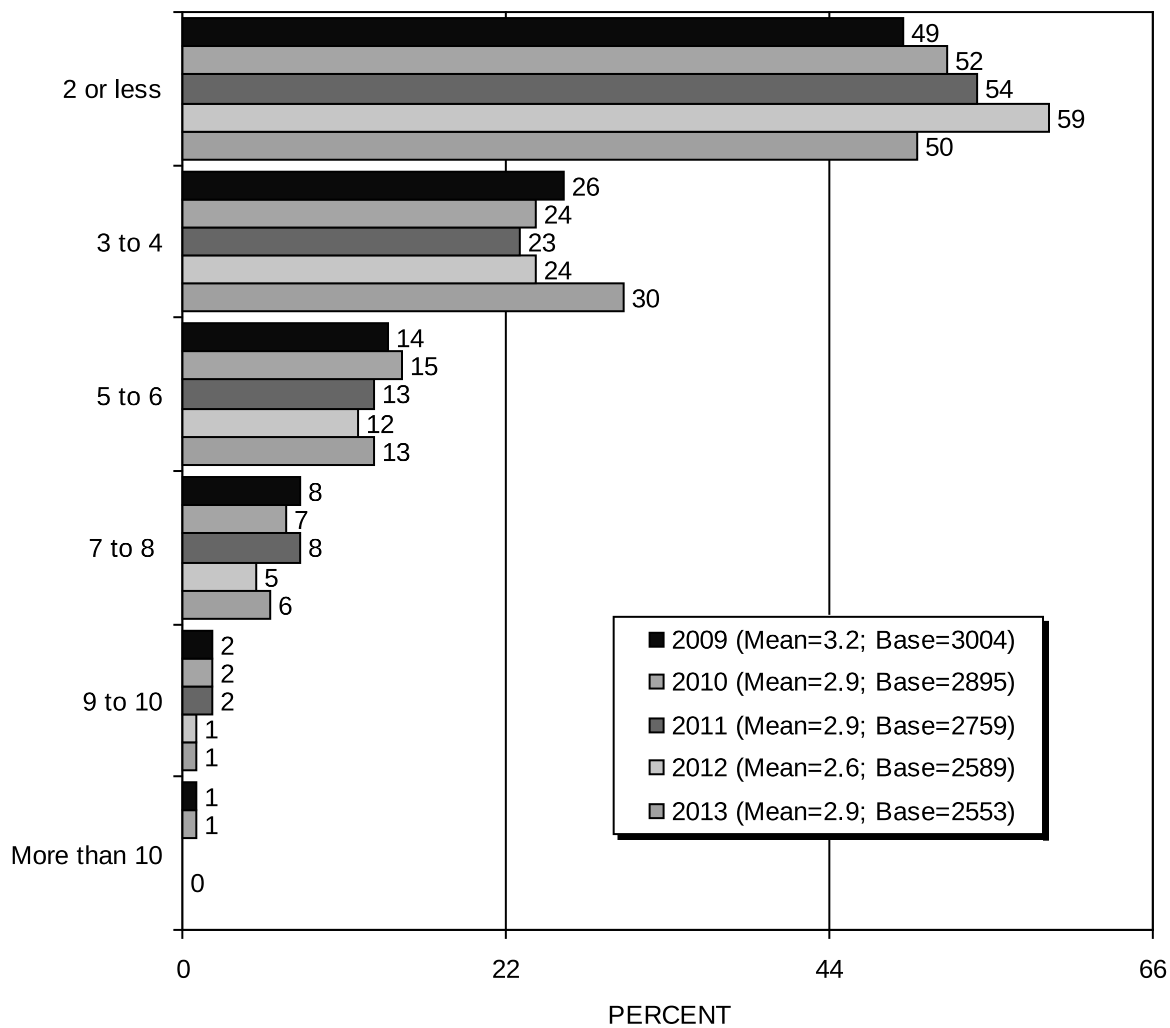
FIGURE 51
Whether Gambled While In Las Vegas*



* 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, one-half (50%) gambled for two hours or less, down significantly from 54% in 2011 and 59% last year (Figure 52). Thirty percent (30%) gambled for three to four hours, up significantly from past years. Seven percent (7%) gambled seven or more hours (down from 11% in 2009 and 10% each in 2010 and 2011). The average amount of time spent gambling per day was 2.9 hours, down significantly from 3.2 hours in 2009 but up from 2.6 hours last year.

FIGURE 53
Number Of Casinos Visited*

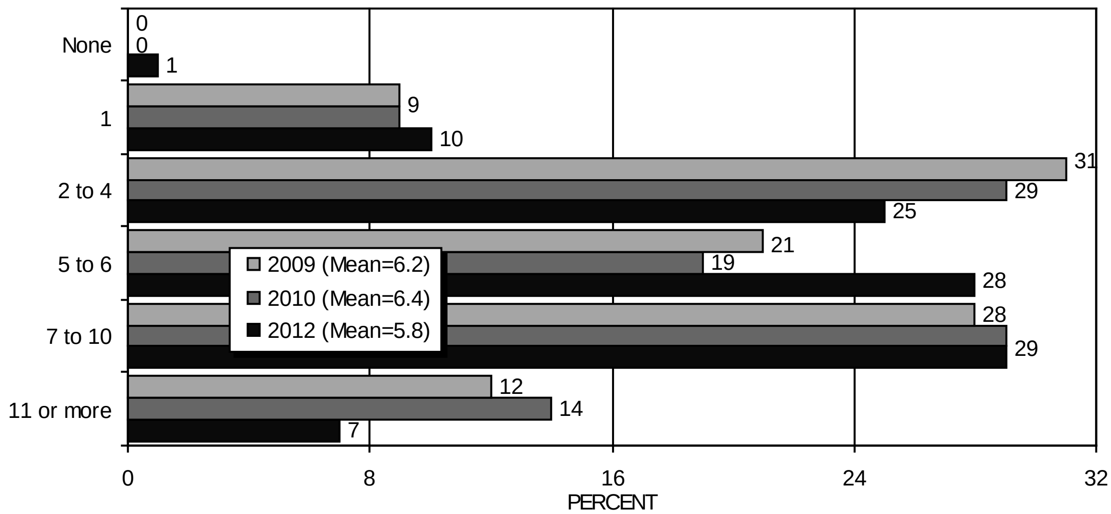
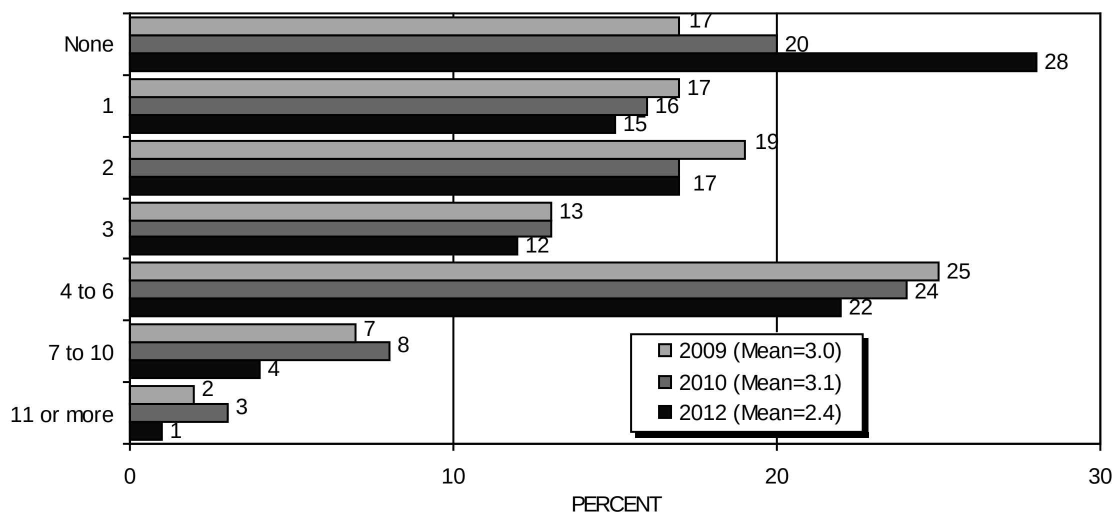


FIGURE 54
Number Of Casinos Where Gambled*



All visitors to Las Vegas were asked how many casinos they had visited, and in how many of those casinos they had gambled. The average number of casinos visited in 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 53 and 54).

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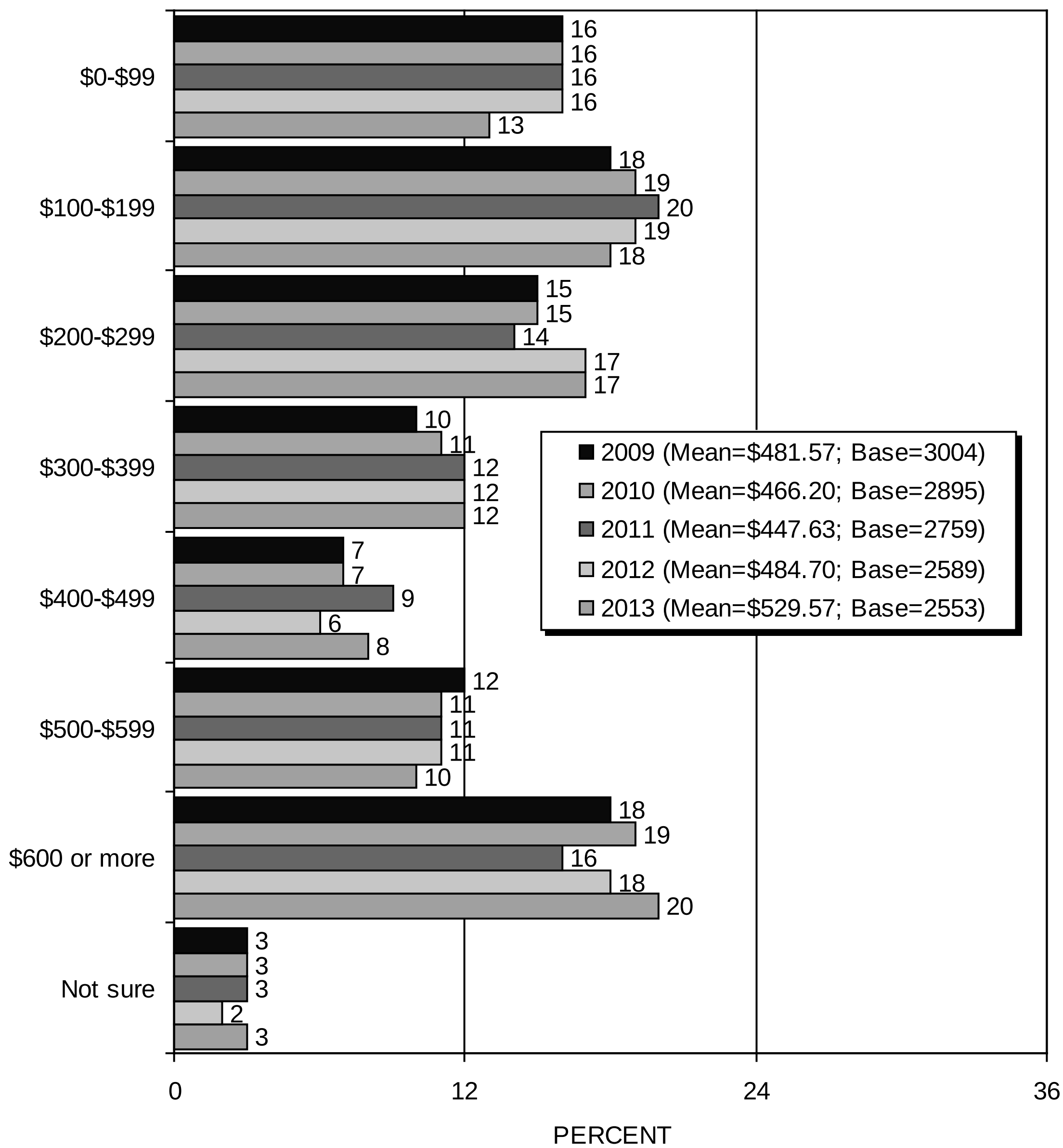
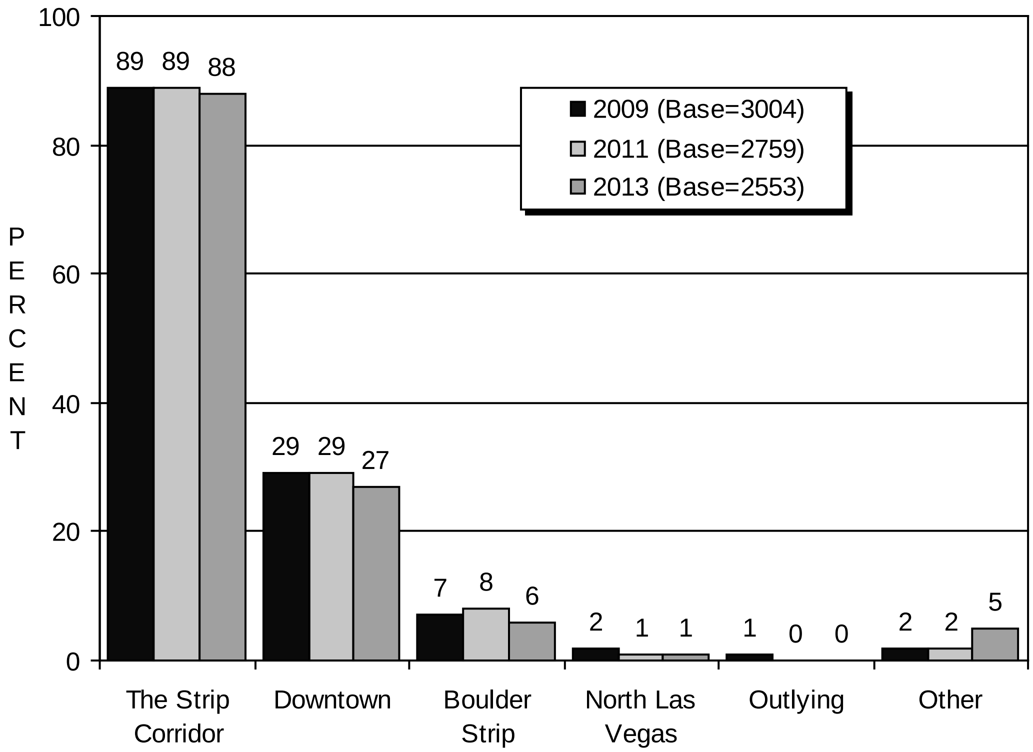
* These questions are asked every other year and were not asked in 2011 or 2013. However, they were included in 2009.

FIGURE 55
Trip Gambling Budget
(Among Those Who Gambled)



Among those who gambled in 2013, the average gambling budget was $529.57, up significantly from $466.20 in 2010 and $447.63 in 2011 (Figure 55).

FIGURE 56
Where Visitors Gambled*
(Among Those Who Gambled – Asked Every Other Year)



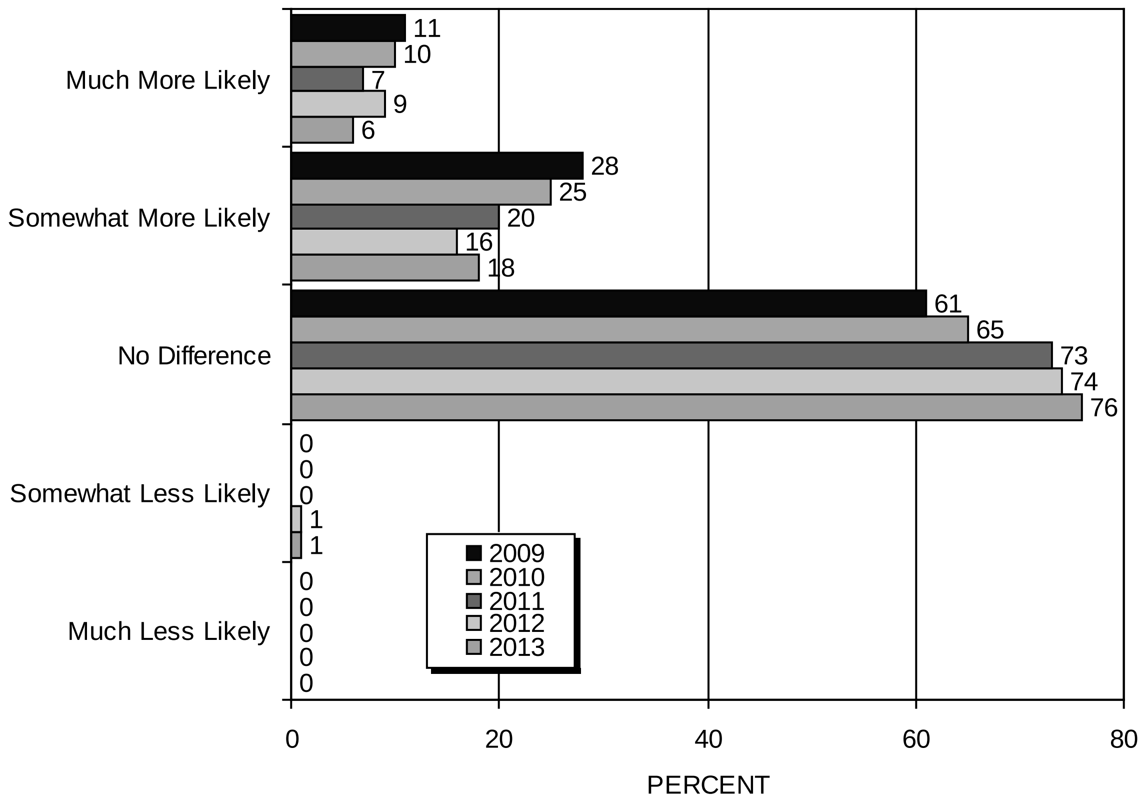
Most visitors (88%) gambled on the Strip Corridor† (Figure 56). Twenty-seven percent (27%) said they gambled Downtown, 6% gambled in the Boulder Strip area (down from 7% in 2009 and 8% in 2011), 1% in North Las Vegas (down from 2% in 2009), and less than 1% in outlying areas.

* This question is asked every other year and was not asked in 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 57
Likelihood Of Visiting Las Vegas With
More Places To Gamble Outside Las Vegas



All visitors to Las Vegas were asked the following:

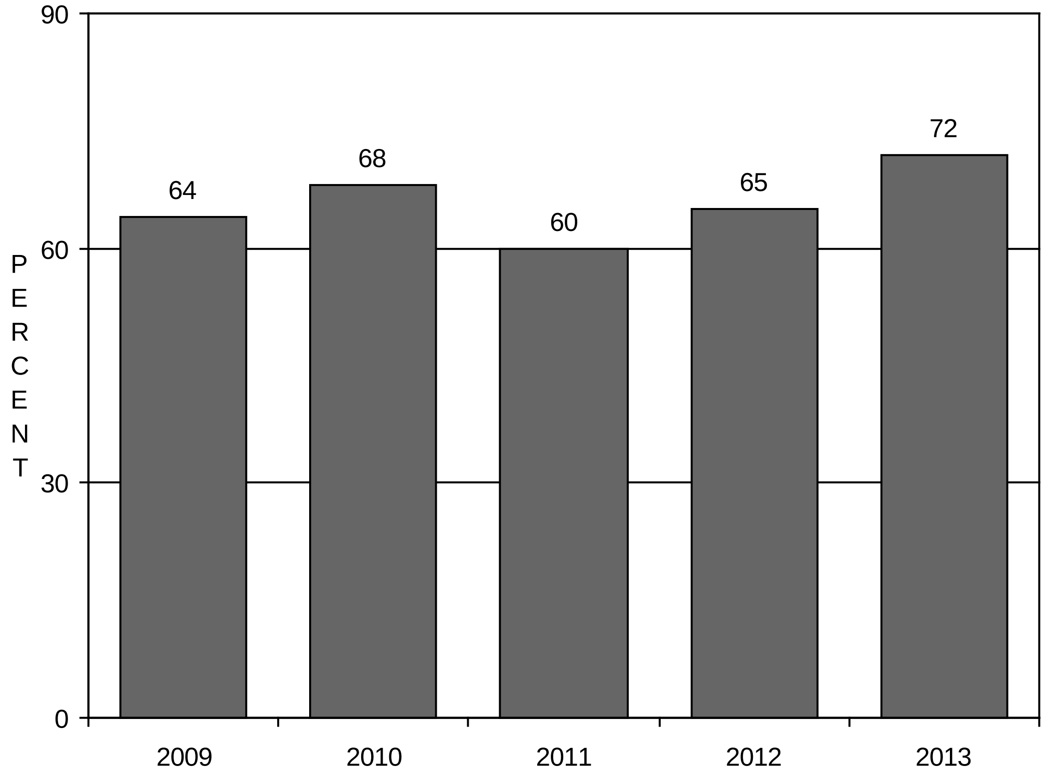
> "Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it not make a difference in your decision to visit Las Vegas?"

Nearly one-quarter (24%) said they were either somewhat or much *more* likely to visit Las Vegas, down significantly 39% in 2009, 35% in 2010, and 27% in 2011. Three-quarters (76%) said that having other places to gamble made no difference in their decision to visit Las Vegas, up significantly from 61% in 2009, 65% in 2010, and 73% in 2011 (Figure 57). One percent (1%) said they were *less* likely to visit Las Vegas.

ENTERTAINMENT

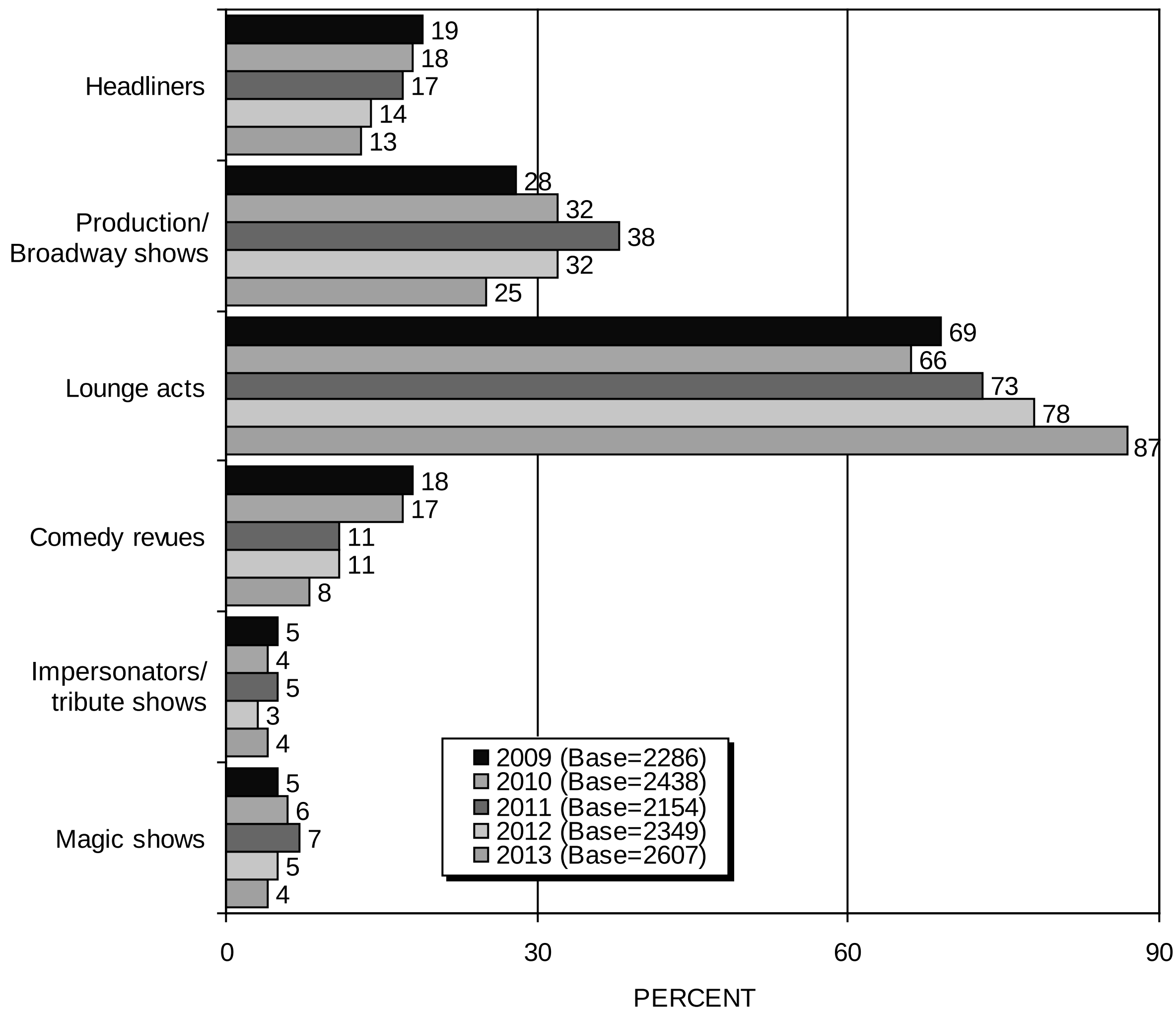
Seventy-two percent (72%) of visitors attended shows during their stay, up significantly from prior years (Figure 58).

FIGURE 58
Entertainment Attendance*



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

FIGURE 59
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)

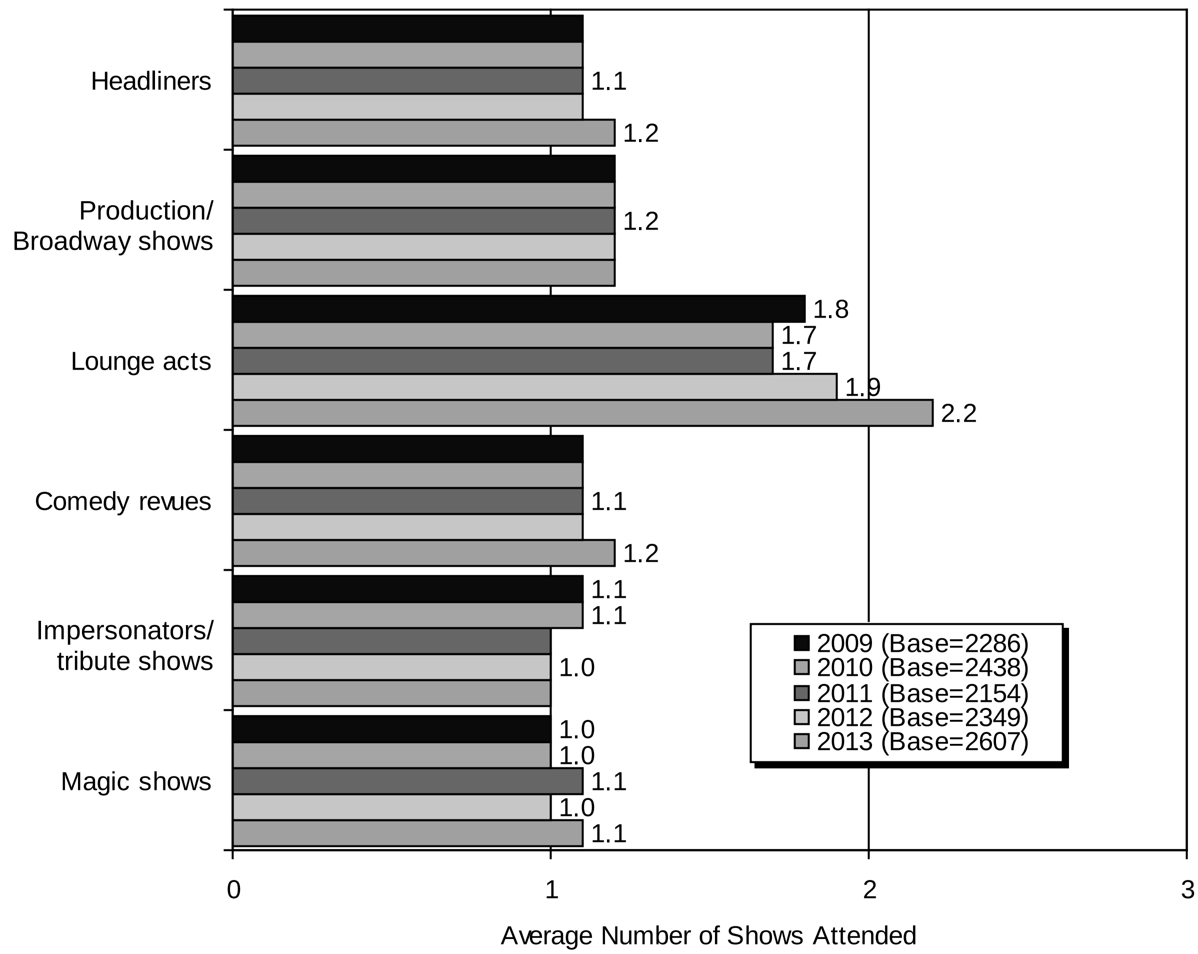


In 2013, 87% of visitors who saw a show in Las Vegas went to a lounge act, up significantly from past years (Figure 59). Twenty-five percent (25%) went to a production or Broadway-type show, down from 32% each in 2010 and 2012, and 38% in 2011. Thirteen percent (13%) saw a headliner (down from 2009 – 2011 results), 8% saw a comedy show (down from 2009 – 2012 results), and 4% each saw a magic show (down from 6% in 2010 and 7% in 2011) or an impersonator/tribute show (down from 5% each in 2009 and 2011).

---

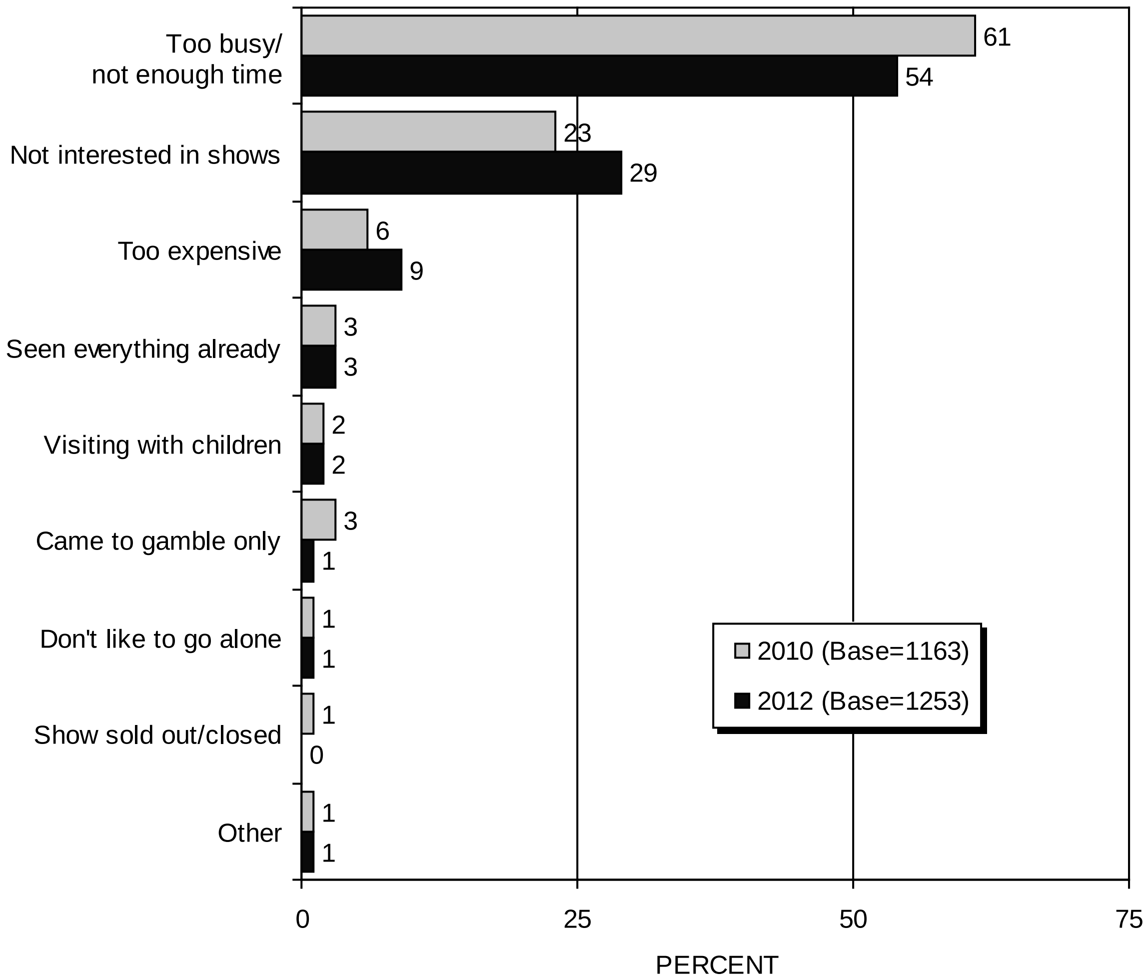
* Multiple responses were permitted.

FIGURE 60
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 60). The average number of shows attended was highest for visitors who saw lounge acts (2.2, up significantly from past years). Visitors saw an average of 1.2 production and Broadway-type shows, 1.2 headliners (up from prior years), 1.2 comedy revues (also up from prior years), 1.0 impersonators/tribute shows, and 1.1 magic shows.

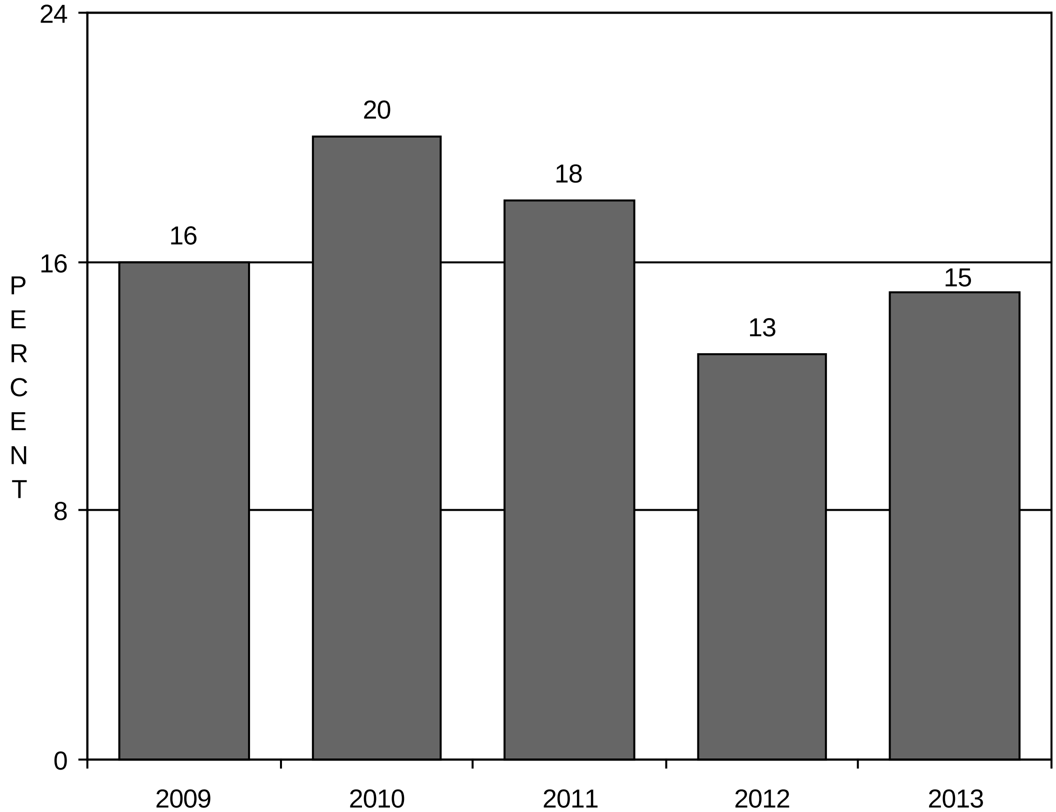
FIGURE 61
Main Reason For Not Attending Any Shows*
(Among Those Who Attended No Shows – Asked Every Other Year)



Visitors who did not attend any shows while in Las Vegas were asked why (Figure 61). More than one-half (54%, down from 61% in 2010) said it was because they were too busy. Twenty-nine percent (29%) said they were not interested in shows (up from 23% in 2010), while 9% said the shows are too expensive (up from 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 3% in 2010) or that they didn't like to go to shows alone.

* This question is asked every other year and was not asked in 2009, 2011, or 2013.

FIGURE 62
Whether Has Been To Other Paid Attractions*

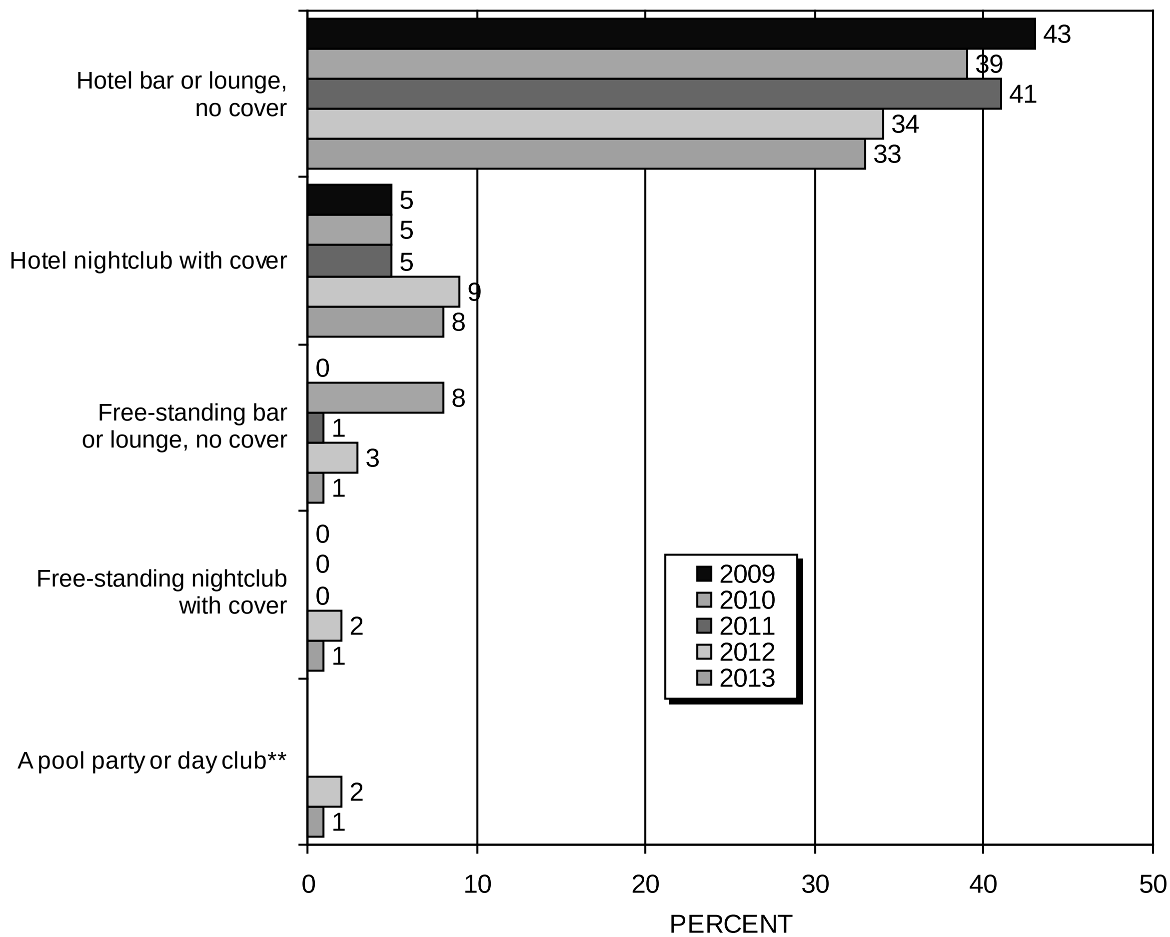


We asked all visitors if they had been to other Las Vegas attractions for which they had to pay, such as the theme parks, water parks, or virtual reality rides (Figure 62). Fifteen percent (15%) said yes, down from 20% in 2010 and 18% in 2011, but up from 13% last year.

---

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

FIGURE 63
Whether Has Been To Nightclubs, Bars, and Lounges*



We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 63). One-third (33%) of visitors said they had been to a no-cover hotel bar or lounge, down significantly from 43% in 2009, 39% in 2010, and 41% in 2011. Eight percent (8%) had been to a hotel nightclub that charged a cover fee, up from 5% in 2009 – 2011. One percent (1%) had been to a no-cover free-standing bar or lounge (down from 8% in 2010 and 3% in 2012), and another 1% had been to a free-standing nightclub that charged a cover fee (down from 2% last year). Beginning in 2012, visitors were also asked if they had visited a pool party or day club, and 1% said they had in 2013.

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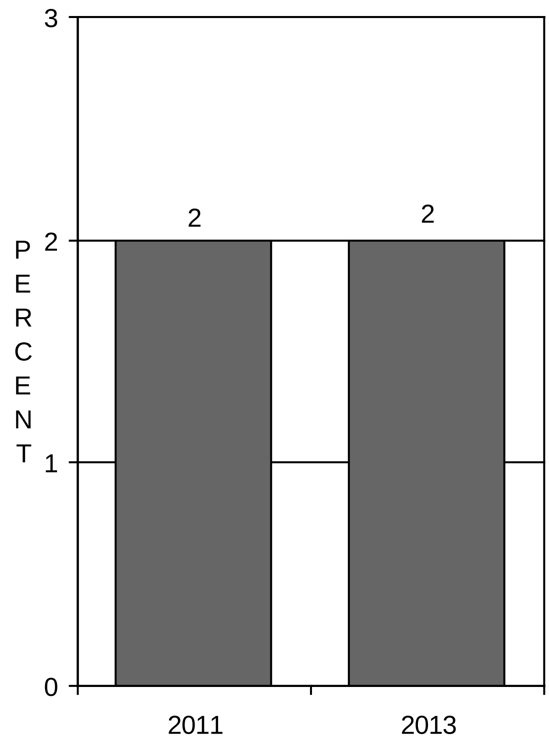
* Only "yes" responses are reported in this chart.

** Pool party option added in 2012.

FIGURE 64
Whether Played Golf*



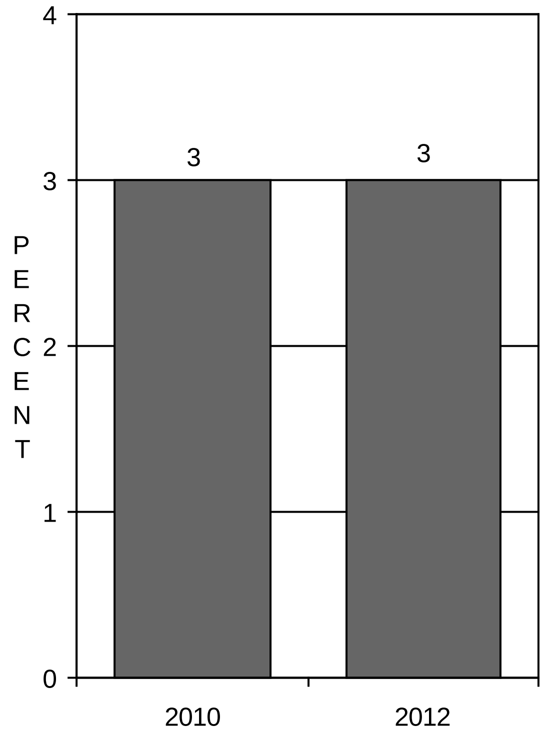
The proportion who said they had played golf during their 2013 visit to Las Vegas was 2% (Figure 64).

---

* This question is not asked every year and was not asked in 2009, 2010, or 2012.

Only “yes” responses are reported in this chart.

FIGURE 65
Whether Visited A Spa*



Visitors were asked if they had visited a spa during this trip to Las Vegas. In 2012, 3% said they had (Figure 65).

* This question is asked every other year and was not asked in 2009, 2011, or 2013.

Only "yes" responses are reported in this chart.

ATTITUDINAL INFORMATION

Eighty-nine percent (89%) of visitors said they were "very" satisfied with their visit to Las Vegas in 2013 (down significantly from 94% each in 2009, 2010, and 2012, and 92% in 2011), while 10% were "somewhat" satisfied (up from 2009 – 2012 figures) (Figure 66).

FIGURE 66
Satisfaction With Visit

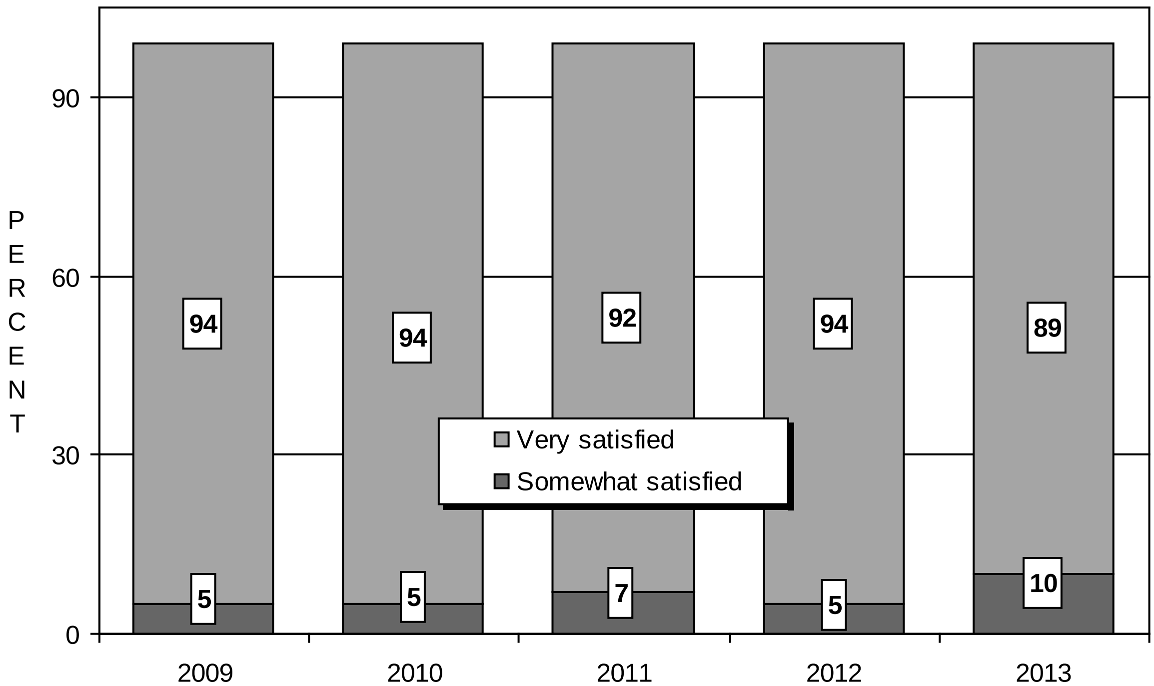
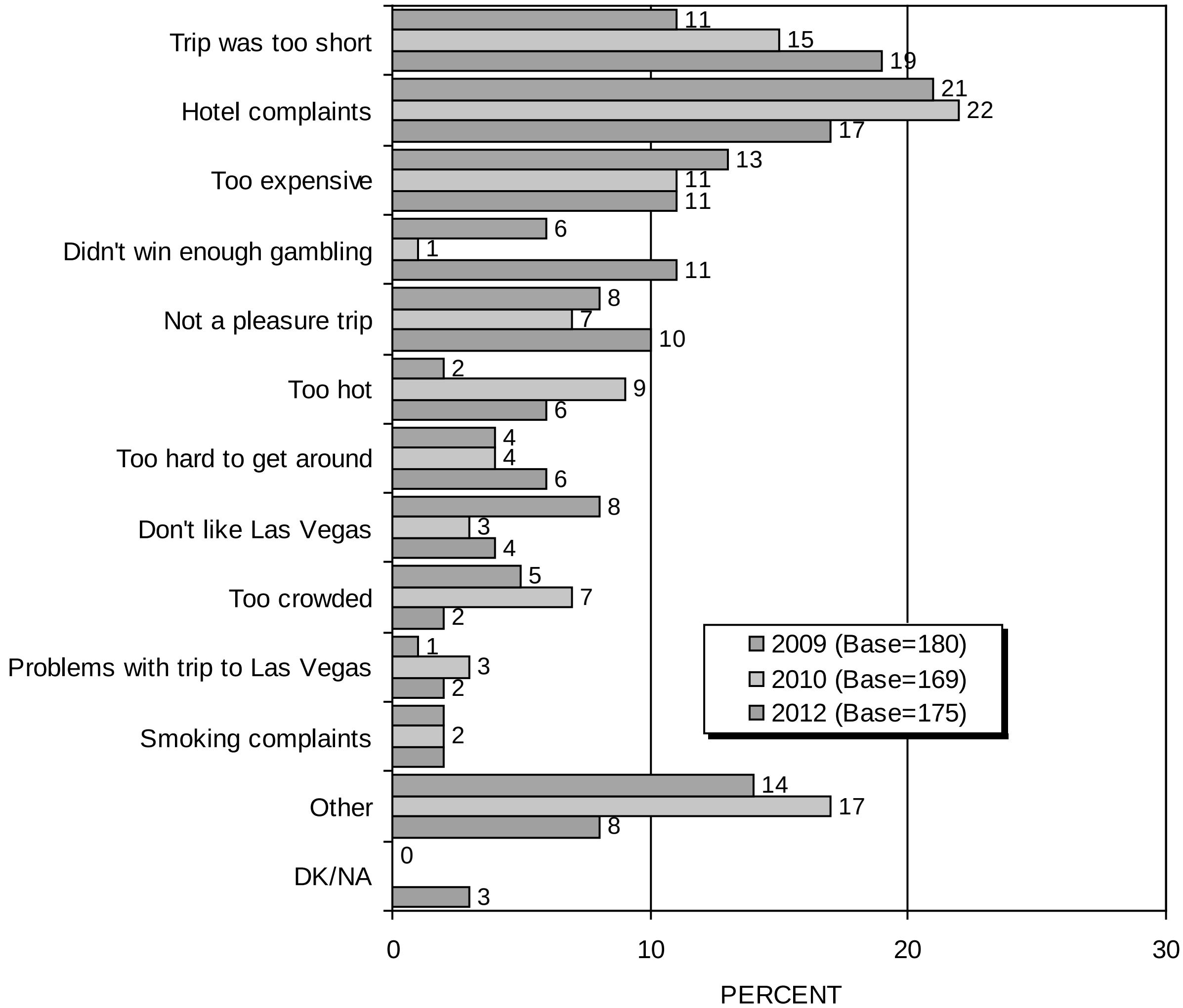


FIGURE 67
Why Not Completely Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied – Asked Every Other Year)

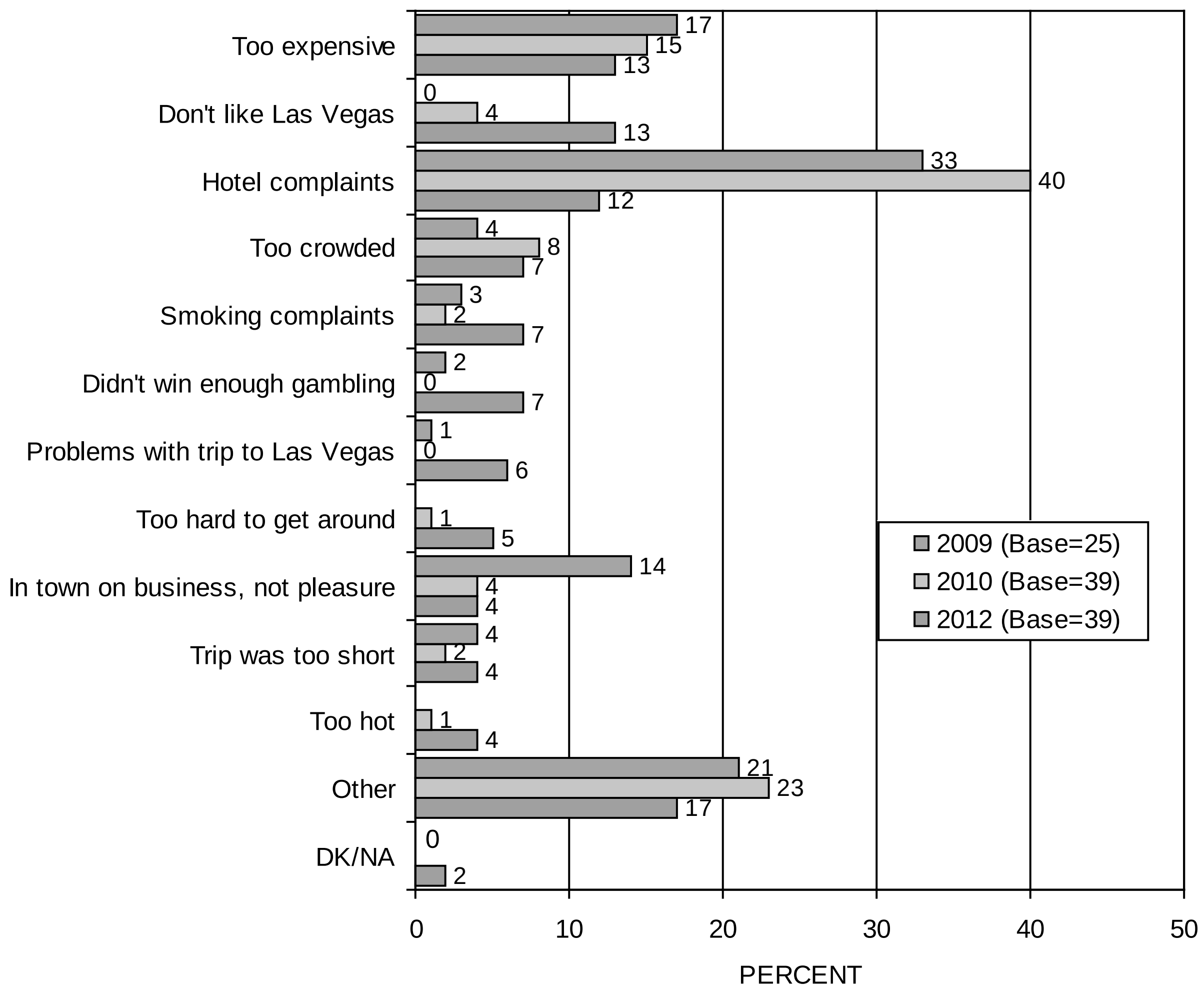


Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 67). Nineteen percent (19%) said their trip was too short, while 17% had complaints about their hotel. Among other reasons given were that they think Las Vegas is too expensive (11%), that they didn't win 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 or 2013. However, it was included in 2009.

FIGURE 68
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 68). 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.

---

* This question is now asked every other year and was not asked in 2011 or 2013. However, it was included in 2009.

Note very small base size for 2009.

FIGURE 69
Likelihood of Returning to Las Vegas For A Vacation Trip In The Future*

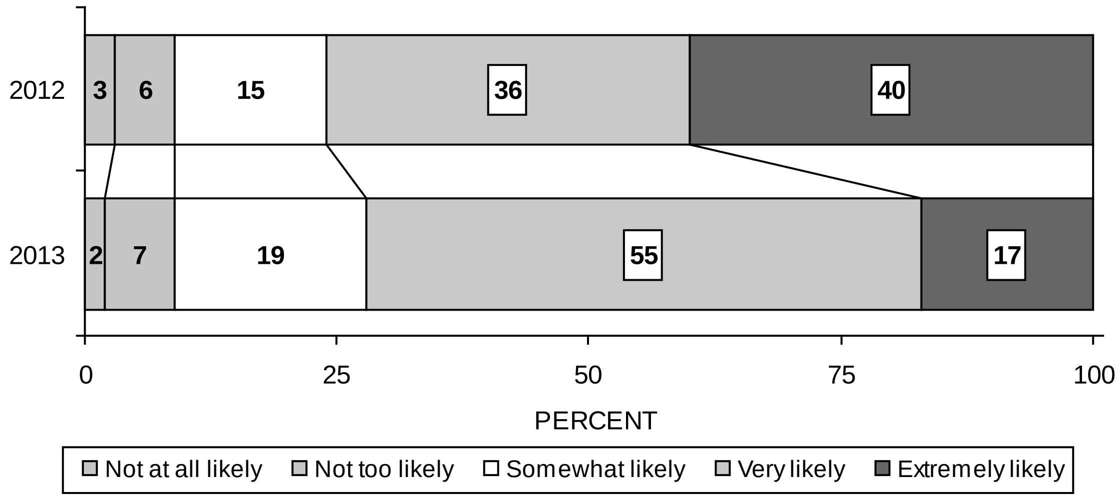
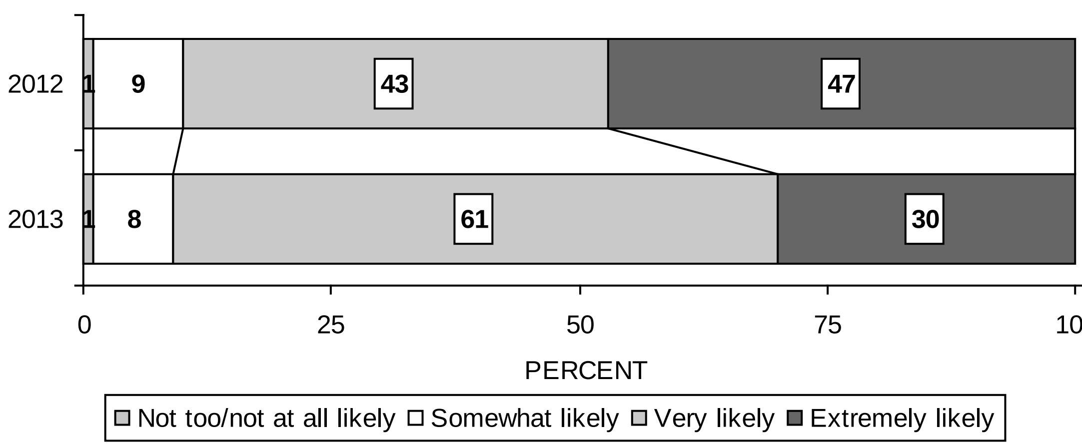


FIGURE 70
Likelihood of Recommending Las Vegas As A Vacation Destination*



Visitors were asked how likely they are to return to Las Vegas in the future for a vacation or pleasure trip (Figure 69). In 2013 72% said they were “extremely” or “very” likely to return to Las Vegas, down from 76% last year, while 19% said they were “somewhat” likely to return, up from 15%. Visitors were also asked how likely they are to recommend Las Vegas to others as a vacation destination (Figure 70). Thirty percent (30%) said they were “extremely” likely to recommend Las Vegas (down from 47% in 2012), while 61% said they were “very” likely (up from 43%).

---

* This question was added in 2012.

VISITOR DEMOGRAPHICS

As Figures 71 and 72 show, visitors in 2013 were likely to be married (79%, up from 75% in 2012), earning $40,000 or more (88%, up significantly from past years), and employed (67%). Twenty percent (20%) were retired (down from 2009 – 2011). The proportion of visitors who were 40 years old or older was 58% (down from 2009 – 2011), and the average age was 45.8 (down significantly from 2009 – 2011 but up from 2012).

FIGURE 71
VISITOR DEMOGRAPHICS

	2009	2010	2011	2012	2013
GENDER					
Male	50%	50%	51%	51%	50%
Female	50	50	49	49	50
MARITAL STATUS					
Married	78	79	77	75	79
Single	15	14	15	18	15
Separated/Divorced	5	5	5	5	4
Widowed	3	2	3	2	2
EMPLOYMENT					
Employed	65	66	66	69	67
Unemployed	2	2	1	2	5
Student	2	3	3	5	2
Retired	28	27	25	19	20
Homemaker	3	3	4	5	6
EDUCATION					
High school or less	25	23	20	15	13
Some college	24	24	25	28	31
College graduate	47	48	50	52	51
Trade/vocational school	4	5	5	5	5
AGE					
21 to 29	11	10	12	19	15
30 to 39	16	19	18	24	27
40 to 49	21	23	22	21	19
50 to 59	19	19	19	16	15
60 to 64	10	9	9	6	9
65 or older	22	20	20	15	15
MEAN	50.0	49.2	49.0	44.8	45.8
BASE	(3600)	(3601)	(3600)	(3602)	(3600)

More than one-half (52%) of visitors were from the western United States (down significantly from 55% each in 2009 and 2011), with the bulk of them coming from California (33%, up from 2009 – 2011) (Figure 73). Twenty percent (20%) of visitors were from foreign countries, up significantly from 14% in 2009, 16% in 2011, and 17% in 2012.

FIGURE 72

VISITOR DEMOGRAPHICS

	2009	2010	2011	2012	2013
ETHNICITY					
White	88%	86%	86%	75%	73%
African American/Black	4	5	4	5	5
Asian/Asian American	2	3	3	9	12
Hispanic/Latino	5	6	7	8	8
Other	1	1	1	3	2
HOUSEHOLD INCOME					
Less than $20,000	1	1	1	3	1
$20,000 to $39,999	6	7	3	6	5
$40,000 to $59,999	20	17	14	17	25
$60,000 to $79,999	25	24	24	26	28
$80,000 to $99,999	18	16	17	15	16
$100,000 or more	20	24	32	26	19
Not sure/no answer	9	10	10	7	6
VISITOR ORIGIN					
U.S.A.	86	82	84	83	80
Eastern states*	7	6	6	7	6
Southern states†	11	11	12	11	12
Midwestern states‡	12	12	11	11	10
Western states§	55	54	55	54	52
California	31	30	31	33	33
Southern California	26	26	26	26	26
Northern California	5	4	5	7	7
Arizona	10	7	9	6	6
Other Western states	14	16	15	15	13
Foreign	14	18	16	17	20
BASE	(3600)	(3601)	(3600)	(3602)	(3600)

* 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 2013

RESPONDENT ID# ____ ____ ____ ____

INTERVIEW DATE: ___ ___/___ ___/___ ___

INTERVIEW LOCATION CODE ____ ____ ____ ____

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

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

INTERVIEW LENGTH ____ ____ MIN.

INTERVIEWER ID # ____ ____

RESPONDENT GENDER (BY OBSERVATION)

MALE 50%
FEMALE 50

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

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

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

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

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

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

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

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

FIRST VISIT 15%	**SKIP TO Q7 ON PAGE 2**
VISITED BEFORE............85	**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 NOT THE RESPONDENT'S FIRST VISIT.)**

1 ....20%
2-3..30
4-5..16
6-10..19
OVER 10...15
6.4 MEAN
4.0 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 ....69%
2-3...22
4-5...6
6 OR MORE...................................3
1.7 MEAN
1.0 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 6%
TO ATTEND A CORPORATE MEETING 1
TO GAMBLE 15
INCENTIVE TRAVEL PROGRAM 0
VACATION/PLEASURE 41
VISIT FRIENDS/RELATIVES 12
TO ATTEND A SPECIAL EVENT 9
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 1%
OTHER BUSINESS PURPOSES 7
JUST PASSING THROUGH 4
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 7%
NO 93
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=250)

MORE INTERESTED 61%
LESS INTERESTED 2
NO DIFFERENCE 37
NOT SURE/DK 0
REFUSED/NA 0

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=250)

YES 44%
NO 56
DK/NA 0

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

Air 42%
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 51
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	50%
B.	Rental car	12
C.	Limousine	1
D.	Bus	12
E.	Hotel/motel shuttle	12
H	Monorail	6
G.	Taxi	27
	WALKED	52
	OTHER	3

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

SAME DAY	0%
1-3 DAYS BEFORE	2
4-6 DAYS BEFORE	3
7-14 DAYS BEFORE	13
15-30 DAYS BEFORE	29
31-60 DAYS BEFORE	26
61-90 DAYS BEFORE	13
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	15%	**ASK Q15**
NO	85	**SKIP TO Q16**
NOT SURE/DK	0	
REFUSED/NA	0	

15. Did the travel agent... **(READ LIST)** (N=533)

Influence your decision to visit Las Vegas?	5%
Influence your choice of accommodations?	77
"Book" your accommodations?	83
"Book" your transportation?	88

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

YES	64%	**ASK Q17**
NO	36	**SKIP TO Q20**
NOT SURE/DK	0	
REFUSED/NA	0	

17. Did you use the Internet to book your transportation? (N=2298)

YES	41%	**ASK Q18**
NO	59	**SKIP TO Q19**
NOT SURE/DK	0	
REFUSED/NA	0	

18. Which website did you use to book your transportation? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).** (N=946)

a.	AOL (AMERICA ONLINE)	0%
b.	CHEAPTICKETS	1
c.	EXPEDIA.COM	10
d.	HOTWIRE.COM	3
e.	MAPQUEST.COM	0
f.	ORBITZ	3
g.	PRICELINE.COM	4
h.	TRAVEL.COM	0
i.	TRAVELOCITY	4
j.	YAHOO	0
k.	KAYAK.COM	2
l.	AIRLINE WEBSITE (ANY)	71
m.	OTHER	2
n.	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=2298)

a.	Influenced your decision to visit Las Vegas?	2%
b.	Influenced your choice of accommodations?	51

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 30%	**SKIP TO Q22**
NO 70	**ASK Q21**
NOT SURE/DK ....0 REFUSED/NA 0	**SKIP TO Q22**

21. **(ASK ONLY IF "YES" IN Q20.)** What is the MAIN REASON you [visited/are visiting] the Downtown area? **(ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**
(N=1084)

TO SEE FREMONT STREET EXPERIENCE 59%
LODGING DOWNTOWN 17
TO GAMBLE 8
TO SHOP 1
TO DINE 6
TO SIGHTSEE (OTHER THAN FREMONT ST. EXPERIENCE) 6
TO ATTEND A SPECIAL EVENT 1
OTHER 2
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 93%
MOTEL 3
RV PARK 2
FRIENDS/RELATIVES 2
DAYTRIP/NO LODGING 0

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=3592)

HOTEL 93%
MOTEL 3
RV PARK 2
FRIENDS/RELATIVES 2

LOCATION OF LODGING
(ALL RESPONDENTS)

STRIP CORRIDOR 77%
  ON THE STRIP 60
  JUST OFF THE STRIP 17
DOWNTOWN 5
BOULDER STRIP 3
OUTLYING AREAS 13
OTHER 2

LOCATION OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT) (N=3592)

STRIP CORRIDOR 77%
  ON THE STRIP 60
  JUST OFF THE STRIP 17
DOWNTOWN 5
BOULDER STRIP 3
OUTLYING AREAS 13
OTHER 2

23. 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=3478)

Booked by phone, calling the hotel, motel, or RV park directly.........38%	**SKIP TO Q25**
Booked through a travel agent (either in person or by phone)......13	
Booked by phone but not by calling the hotel directly and not through a travel agent 2	
Booked at a website on the Internet 39	**ASK Q24**
Booked in person at the hotel, motel, or RV park................................2	**SKIP TO Q25**
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 4	
OTHER (SPECIFY:)........0	
REFUSED/NA 0	

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

(N=1362)

a. HOTEL WEBSITE (ANY).............38%
b. HOTELS.COM 13
c. EXPEDIA.COM 12
d. LAS VEGAS.COM 6
e. TRAVELOCITY 4
f. AIRLINE WEBSITE........................ 4
g. ORBITZ... 2
h. PRICELINE.COM.......................... 4
i. VEGAS.COM 6
j. KAYAK.COM................................. 2
k. HOTWIRE..................................... 4
l. OTHER 5
m. NOT SURE/DK 0

25. 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=3478)

SAME DAY...............................2%
1-3 DAYS BEFORE 3
4-6 DAYS BEFORE 4
7-14 DAYS BEFORE 22
15-30 DAYS BEFORE 41
31-60 DAYS BEFORE 16
61-90 DAYS BEFORE 6
MORE THAN 90 DAYS BEFORE........................7
NOT SURE/DK.........................0
REFUSED/NA 0

26. Including yourself, how many people stayed in your room? (N=3470)

ONE 11%
TWO 71
THREE 8
FOUR 8
FIVE 2
SIX OR MORE 0
REFUSED/NA 0
2.2 MEAN
2.0 MEDIAN

27. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=3418)

HOTEL/TRANSPORTATION PACKAGE DEAL .... 10% HOTEL/AMENITIES PACKAGE DEAL .... 0 TOUR/TRAVEL GROUP 3	**ASK Q28**
CONVENTION GROUP/COMPANY MEETING ...... 3 CASINO RATE .... 7 REGULAR FULL-PRICE ROOM RATE 32	**SKIP TO Q30**
CASINO COMPLIMENTARY 19	**SKIP TO Q32**
ANOTHER RATE 25	**SKIP TO Q30**

28. What was the total PER PERSON cost of your package? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS.)** (N=459)

$0-$99 .... 1%
$100-$199 1
$200-$299 3
$300-$399 8
$400-$499 16
$500-$999 37
$1000 OR MORE 32
NOT SURE/REFUSED 2
$868.24 MEAN
$700.00 MEDIAN

29. Where did you first hear about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=459)

NEWSPAPER 0%
TELEVISION 0
TRAVEL AGENT 59
WORD OF MOUTH 3
OFFER RECEIVED IN THE MAIL 0
E-MAIL OFFER 0
INTERNET AD 14
ANY WEBSITE 23
RESERVATION AGENT/
CALL CENTER 0
OTHER 1
NOT SURE/NO ANSWER 0

PACKAGE VISITORS SKIP TO Q32

30. **(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=2296)

$0-$35 .... 7%
$36-$50 17
$51-$100 50
$101 OR MORE 24
NOT SURE/REFUSED 3
$83.62 MEAN
$75.00 MEDIAN

31. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=2296)

NEWSPAPER.................................... 0%
TELEVISION.................................... 0
RADIO 0
TRAVEL AGENT 7
WORD-OF-MOUTH........................ 17
OFFER RECEIVED IN THE MAIL..................................... 3
BROCHURE 1
E-MAIL OFFER................................ 1
INTERNET AD (POP-UP OR BANNER AD) 9
ANY WEBSITE 44
OUTDOOR BILLBOARD 0
RESERVATION AGENT/ CALL CENTER 18
OTHER 0
NOT SURE/DK 0

32. **(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..9%
2...67
3..7
4...12
5 OR MORE 5
2.4 MEAN
2.0 MEDIAN

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

YES 10%
NO 90

34. 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... 22
3... 33
4... 21
5 OR MORE............................ 16
3.3 MEAN
3.0 MEDIAN

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

1.. 0%
2.. 7
3... 22
4... 33
5... 21
6 OR MORE............................ 16
4.3 MEAN
4.0 MEDIAN

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

SUNDAY 13%
MONDAY 14
TUESDAY 11
WEDNESDAY........................14
THURSDAY 17
FRIDAY 20
SATURDAY............................12

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

YES 71%	**ASK Q**Error! Bookmark not defined.
NO 29	**SKIP TO Q38**

38. 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=2553)

2 OR LESS 50%
  LESS THAN 1 HOUR 14
  ONE HOUR 12
  TWO HOURS 24
3 TO 4 30
5 TO 6 13
7 TO 8 6
9 TO 10 1
MORE THAN 10 0
2.9 MEAN
3.0 MEDIAN

39. Which type of casino game do you play MOST OFTEN. (N=2553)

SLOT MACHINES 54%
VIDEO POKER 11
OTHER VIDEO MACHINES (21, KENO, ETC.) 1
BLACKJACK 17
CRAPS 5
KENO 1
POKER 5
RACE/SPORTSBOOK 1
ROULETTE 3
OTHER 2
NOT SURE/DK 0
REFUSED/NA 0

40. 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=2553)

$0-$99 .... 13%
$100-$199 18
$200-$299 17
$300-$399 12
$400-$499 8
$500-$599 10
$600 OR MORE 20
NOT SURE/REFUSED 3
$529.57 MEAN
$300.00 MEDIAN

41. Where have you gambled during your visit to Las Vegas? **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=2553)

Downtown Las Vegas (that is, on or near Fremont Street) 27%
On the Strip (that is, on Las Vegas Boulevard) 80
Just off the Strip (for example, RIO, LVH, Orleans) 19
Boulder Hwy & Henderson (Sam's Town, Boulder Station, Sunset Station, etc.) 6
North Las Vegas (Santa Fe, Texas Station, Fiesta, etc.) 1
Outlying areas (Jean, Mesquite, Searchlight, etc.) 0
OTHER (SPECIFY:) 5

42. **(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 6%
4 -SOMEWHAT MORE LIKELY 18
3 -NO DIFFERENCE 76
2 -SOMEWHAT LESS LIKELY 1
1 -MUCH LESS LIKELY 0
NOT SURE/DK 0
REFUSED/NA 0
3.3 MEAN
3.0 MEDIAN

43. 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.)**

44. **(ASK FOR EVERY "YES" IN Q45.)** And how many **(INSERT EACH TYPE MENTIONED IN Q43)** have you seen during this trip? **(RECORD TWO-DIGIT NUMBER IN APPROPRIATE BLANKS.)**

	Q38				Q38	
	YES	**NO**	**DK**	**NA**	**MEAN**	
A. Big-name headliner performers in Las Vegas for a special concert (for example, Jay Leno, Shania Twain, Tim Allen, Jerry Seinfeld, Celine Dion, etc.)	9%	91%	0%	0%	1.2	(N=332)
B. Broadway/production shows	18	72	0	0	1.2	(N=653)
C. Comedy shows or revues (for example, Improv, Comedy Stop, etc.)	6	94	0	0	1.2	(N=202)
D. Lounge acts or other kinds of free entertainment provided at a location other than the "main" show room	63	37	0	0	2.2	(N=2261)

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

YES (HAS *NOT* SEEN ANY SHOWS)	NO (HAS SEEN SHOWS)
28%	72%

46. 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, Circus-Circus Adventuredome, New York New York "Manhattan Express" rollercoaster, etc.?

YES 15%
NO 85
NOT SURE/DK 0
REFUSED/NA 0

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

A. A nightclub in a hotel with a cover charge? 8%
B. A free-standing nightclub with a cover charge? 1
C. A bar or lounge in a hotel without a cover charge? 33
D. Any free-standing bar or lounge without a cover charge? 1
E. A pool party or day club? .. 1

48. Did you play golf while visiting Las Vegas?

YES 2%
NO 98

49. 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.)**

$278.95 MEAN (INCLUDING $0)
$281.06 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.)**

$59.68 MEAN (INCLUDING $0)
$107.26 MEAN (EXCLUDING $0)

50. 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).....	$140.90 $237.41	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)	$38.45 $121.19	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)
C. Sightseeing	$9.29 $126.17	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)
X. Other	$5.19 $272.36	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)

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

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

Very satisfied................................89%
Somewhat satisfied 10
Somewhat dissatisfied....................1
Very dissatisfied 0
DO NOT READ
NOT SURE/DK...............................0
REFUSED/NA 0

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

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

Employed 67%	**ASK Q38**
Unemployed.................... 5 Student........................... 2 Retired.......................... 20 Homemaker..................... 6	**SKIP TO Q38**
<u>DO NOT READ</u> REFUSED/NA................. 0	**SKIP TO Q38**

53. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS <u>NOT</u> AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=2395)

Professional/technical 28%
Managers/proprietors 17
Sales/clerical 28
Craft workers 8
Service workers........................... 18
Laborers (non-agricultural)............ 0
Agricultural 0

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

GRADE SCHOOL OR SOME HIGH SCHOOL 0%
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12) 13
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE)...31
GRADUATED COLLEGE 42
GRADUATE SCHOOL (MASTER'S OR PH.D.)........................9
TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 5
REFUSED/NA......................................0

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

Married 79%
Single 15
Separated or divorced...........................4
Widowed 2
REFUSED/NA......................................0

56. What country do you live in?

USA 80%	**ASK Q38**
FOREIGN 20	**SKIP TO Q38**

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

EAST 6%
SOUTH..12
MIDWEST 10
WEST..52
CALIFORNIA....................................33
NORTHERN CA. 7
SOUTHERN CA. 26
ARIZONA 6
OTHER WEST 13
FOREIGN VISITORS..........................20

58. **(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 73%
BLACK OR AFRICAN AMERICAN....... 5
ASIAN OR ASIAN AMERICAN........... 12
HISPANIC/LATINO............................... 8
NATIVE AMERICAN,
MIXED RACE, OTHER......................... 2

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

45.8 MEAN
44.0 MEDIAN

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

21 to 29 ....15%
30 to 39 27
40 to 49 19
50 to 59 15
60 to 64 9
65 and older 15
REFUSED/NA 0

60. 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..........................1%
B. $20,000 to $29,999.........................1
C. $30,000 to $39,999.........................3
D. $40,000 to $49,999.......................12
E. $50,000 to $59,999.......................14
F. $60,000 to $69,999.......................16
G. $70,000 to $79,999.......................12
H. $80,000 to $89,999.......................13
I. $90,000 to $99,999.........................3
J. $100,000 to $149,999...................16
K. $150,000 or more 3
NOT SURE/NO ANSWER 6

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
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