LAS VEGAS
VISITOR PROFILE STUDY
2011

LAS VEGAS CONVENTION
AND **VISITORS AUTHORITY**

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LAS VEGAS VISITOR PROFILE

Calendar Year 2011

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, 2007 to December 31, 2007; January 1, 2008 to December 31, 2008; January 1, 2009 to December 31, 2009, January 1, 2010 to December 31, 2010 and January 1, 2011 to December 31, 2011. Approximately 300 interviews were conducted per month in 2007, 2008, 2009, 2010, and 2011.

This report presents the results of calendar year 2011, as well as the four previous years (2007, 2008, 2009, and 2010). 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 2011. These questions will be rotated back into the questionnaire in Calendar Year 2012 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

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

REASONS FOR VISITING — EXECUTIVE SUMMARY

Sixteen percent (16%) of 2011 visitors indicated they were first-time visitors to Las Vegas, not significantly different from past years. One-half (50%) of all visitors said their primary reason for visiting Las Vegas this trip was vacation or pleasure, up from 2007 – 2009 . Seven percent (7%) said they came primarily to gamble, down from 2007 – 2010. Thirteen percent (13%) were visiting friends or relatives (up from 11% each in 2008 and 2010). Among repeat visitors, 46% came for vacation or pleasure (up from 2007 – 2009), 8% came to gamble (down from 2007 – 2010), and 15% came to visit friends and relatives (up from 12% each in 2008 and 2010). The majority of first-time visitors continue to come primarily for vacation or pleasure (70%, up from 2007 – 2010), with few (1%) saying they came primarily to gamble. Seven percent (7%) of first-time visitors said they were visiting friends and relatives. Among all visitors, the average number of visits over the past five years was 6.2 (down from 6.8 in 2008). Among all visitors, the average number of visits in the past year was 1.7.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2007	2008	2009	2010	2011
Proportion of visitors who were first-time visitors	19%	16%	17%	18%	16%
Proportion of visitors whose primary purpose for current trip was vacation or pleasure	42%	39%	40%	51%	50%
Proportion of visitors whose primary purpose for current trip was to gamble	11%	13%	13%	9%	7%
Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	13%	11%	15%	11%	13%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	38%	36%	35%	47%	46%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	14%	15%	15%	10%	8%
Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	14%	12%	16%	12%	15%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	60%	57%	61%	69%	70%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	1%	2%	2%	1%	1%
Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	8%	9%	10%	8%	7%
Average number of visits in past five years	6.3	6.8	6.5	5.9	6.2
Average number of visits in past year	1.8	1.8	1.7	1.7	1.7

TRAVEL PLANNING — EXECUTIVE SUMMARY

Fifty-six percent (56%) of visitors in 2011 arrived via ground transportation (down significantly from 59% in 2010, and 44% arrived by air (up from 41% last year). Forty-nine percent (49%) of visitors said they used their own vehicles while traveling around Las Vegas, similar to prior years. Twenty-four percent (24%) reported taking a taxi (up from 2009), while 25% volunteered that they walked while in Las Vegas (down from 36% in 2007, 31% in 2008, and 28% in 2010).

The proportion of visitors who reported using a travel agent to plan their current trip to Las Vegas was 13% in 2011, a decline from 15% each in 2007 and 2008. Visitors were asked if they used the Internet to plan their current trip to Las Vegas, and over one-half (55%) said they had done so, a significant increase over 2007 – 2009. Of these visitors, over two-thirds (69%) said they booked their accommodations online (up significantly from 2007-2008), while over one-half (54%) said they used the Internet to book their transportation (down from 2007 - 2009). Fifty-two percent (52%) said they found information online that influenced their choice of accommodations (up from 2007 and 2008 but down from 2009).

The proportion of visitors who said they visited Downtown Las Vegas was 34%, down from 2007 – 2010 results.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2007	2008	2009	2010	2011
Proportion of visitors who traveled to Las Vegas by ground transportation (automobile/bus/RV)	54%	57%	58%	59%	56%
Proportion of visitors who traveled to Las Vegas by air	46%	43%	42%	41%	44%
Proportion of visitors who used their own vehicle when traveling around Las Vegas	46%	48%	50%	48%	49%
Proportion of visitors who reported walking when traveling around Las Vegas	36%	31%	22%	28%	25%
Proportion of visitors who used taxis when traveling around Las Vegas	27%	25%	21%	23%	24%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Las Vegas	15%	15%	13%	12%	13%
Proportion who used the Internet to plan trip	40%	44%	47%	53%	55%
Proportion of visitors who used the Internet to book accommodations in Las Vegas	60%	54%	69%	67%	69%
Proportion of visitors who used the Internet to book transportation to Las Vegas	63%	59%	58%	56%	54%
Proportion of visitors who used the Internet and said it influenced their choice in accommodations	34%	49%	58%	52%	52%
Proportion of visitors who visited Downtown Las Vegas on their current trip	40%	46%	38%	45%	34%

TRIP CHARACTERISTICS AND EXPENDITURES — EXECUTIVE SUMMARY

The average party size in 2011 was 2.3 persons, down significantly from 2007. Ten percent (10%) of visitors had children under the age of 21 in their immediate party, up from 2007 – 2010 results. Virtually all visitors (99.8%) stayed overnight.

Visitors in 2011 stayed an average of 3.7 nights and 4.7 days in Las Vegas, up from 2007 – 2009. Among overnighters, 95% stayed in a hotel or motel, with an average of 2.1 room occupants (down from 2007 but up from 2010). Visitors spent an average of $84.04 per night on lodging this year, up significantly from 2009 and 2010, but lower than in 2007 – 2008. Eighteen percent (18%) of visitors staying in a hotel or motel paid a regular room rate, down from 2007, 2008, and 2010. Seventeen percent (17%) purchased a package trip, up from 2007 – 2009 results. The average cost of such a package in 2011 was $757.83, up significantly from $640.29 in 2009 and $651.02 in 2010.

Over the course of their entire stay in Las Vegas, visitors spent an average of $274.69 for food and drink (up significantly from 2007, 2009, and 2010) and $64.25 for local transportation (up significantly from 2008 and 2009). Visitors spent an average of $129.34 for shopping (up significantly from 2007 and 2009), $47.52 on shows (up from $39.87 in 2009), and $10.24 on sightseeing, up from 2008 - 2010.

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2007	2008	2009	2010	2011
Average number of adults in immediate party	2.5	2.4	2.4	2.4	2.3
Proportion of visitors with persons under 21 in their immediate party	8%	6%	8%	7%	10%
Proportion of visitors who stayed overnight	99.3%	99.6%	99.8%	99.3%	99.8%
Days stayed (average)	4.5	4.5	4.6	4.6	4.7
Nights stayed (average)	3.5	3.5	3.6	3.6	3.7
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	95%	94%	96%	95%	95%
Number of room occupants (average — hotel/motel only)	2.2	2.1	2.1	2.0	2.1
Lodging expenditures (average per night — non-package)	$108.87	$101.68	$75.78	$79.64	$84.04
Proportion of visitors who paid a regular room rate	33%	32%	20%	23%	18%
Proportion of visitors who bought a package or travel group trip	14%	15%	15%	16%	17%
Average cost of package per person (among package/tour group visitors)	$709.90	$746.69	$640.29	$651.02	$757.83
Average trip expenditures for food and drink	$254.49	$273.39	$250.32	$256.82	$274.69
Average trip expenditures for local transportation	$62.66	$59.26	$53.31	$62.87	$64.25
Average trip expenditures for shopping	$114.50	$121.90	$101.97	$122.80	$129.34
Average trip expenditures for shows	$47.87	$51.64	$39.87	$49.28	$47.52
Average trip expenditures for sightseeing	$8.31	$7.12	$5.77	$7.21	$10.24

GAMING BEHAVIOR AND BUDGETS — EXECUTIVE SUMMARY

Seventy-seven percent (77%) of 2011 visitors said they gambled while in Las Vegas, down significantly from 84% in 2007, 85% in 2008, 83% in 2009, and 80% in 2010. Gamblers spent an average of 2.9 hours per day gambling, down significantly from 3.4 hours in 2007, 3.3 hours in 2008, and 3.2 hours in 2009. The average gaming budget in 2010 was $447.63, not significantly different from the past two years, but down from $555.64 in 2007 and $531.98 in 2008. Twenty-seven percent (27%) of visitors said they would be *more* likely to visit Las Vegas even with the wider gambling choices available to them, down significantly from 48% in 2007, 38% in 2008, 39% in 2009, and 35% in 2010.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2007	2008	2009	2010	2011
Proportion who gambled while visiting Las Vegas	84%	85%	83%	80%	77%
Average number of hours per day spent gambling (among those who gambled)	3.4	3.3	3.2	2.9	2.9
Average trip gambling budget (among those who gambled)	$555.64	$531.98	$481.57	$466.20	$447.63
Proportion who said they would be “more likely” to visit Las Vegas even with more places to gamble outside Las Vegas	48%	38%	39%	35%	27%

ENTERTAINMENT — EXECUTIVE SUMMARY

Sixty percent (60%) of visitors attended shows during their current stay, down significantly from 63% in 2007, 72% in 2008, 64% in 2009, and 68% in 2010. Among those who saw a show in Las Vegas, 73% went to a lounge act, up significantly from 64% in 2007, 69% in 2009, and 66% in 2010. Eleven percent (11%) of these visitors attended comedy shows, down significantly from 21% in 2007, 14% in 2008, 18% in 2009, and 17% last year. Seventeen percent (17%) of visitors who saw shows saw a big-name headliner, similar to past years. Eighteen percent (18%) of all visitors said they had been to other paid attractions in Las Vegas, down from 22% in 2007 and 21% in 2008, but up from 16% in 2009.

SUMMARY TABLE OF ENTERTAINMENT ACTIVITIES

	2007	2008	2009	2010	2011
Proportion who attended any shows during their current stay in Las Vegas	63%	72%	64%	68%	60%
Proportion who attended lounge acts (among those who attended shows)	64%	74%	69%	66%	73%
Proportion who attended big-name headliner performances (among those who attended shows)	19%	18%	19%	18%	17%
Proportion who attended comedy shows (among those who attended shows)	21%	14%	18%	17%	11%
Proportion who went to other paid attractions in Las Vegas	22%	21%	16%	20%	18%

ATTITUDINAL INFORMATION — EXECUTIVE SUMMARY

Ninety-two percent (92%) of visitors reported being “very satisfied” with their trip to Las Vegas, up from 89% in 2007 but down from 94% each in 2009 and 2010.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2007	2008	2009	2010	2011
Proportion who were “very satisfied” with their current trip to Las Vegas	89%	93%	94%	94%	92%

VISITOR DEMOGRAPHICS — EXECUTIVE SUMMARY

Visitors in 2011 were likely to be married (77%, down from 80% in 2008), earning $40,000 or more (87%, up significantly from 2007 – 2010 results), and employed (66%). One-quarter (25%) were retired (down from 28% each in 2008 and 2009). The proportion of visitors who were 40 years old or older was 70% (down from 76% in 2008 and 72% in 2009) and the average age was 49.0 (down from 2008 and 2009). More than one-half (55%, up from 52% each in 2007 and 2008) of visitors were from the Western United States, with the bulk of them coming from California (31%, up from 28% in 2008). Sixteen percent (16%) of visitors were from foreign countries, up from 12% in 2007 but down from 18% in 2010.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2007	2008	2009	2010	2011
Proportion of visitors who were married	79%	80%	78%	79%	77%
Proportion of visitors with a household income of $40,000 or more	79%	83%	83%	81%	87%
Proportion of visitors who were employed	67%	66%	65%	66%	66%
Proportion of visitors who were retired	26%	28%	28%	27%	25%
Proportion of visitors who were 40 years old or older	71%	76%	72%	71%	70%
Average age	49.0	50.6	50.0	49.2	49.0
Proportion of visitors with a college diploma	44%	45%	47%	48%	50%
Proportion of visitors from the West	52%	52%	55%	54%	55%
Proportion of visitors from California	31%	28%	31%	30%	31%
Proportion of visitors from a foreign country	12%	15%	14%	18%	16%

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 2011.

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2007	2008	2009	2010	2011
Days stayed (average)	4.5	4.5	4.6	4.6	4.7
Nights stayed (average)	3.5	3.5	3.6	3.6	3.7
Proportion of visitors who stayed overnight	99.3%	99.6%	99.8%	99.3%	99.8%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	95%	94%	96%	95%	95%
Lodging expenditures (average per night — non-package)	$108.87	$101.68	$75.78	$79.64	$84.04
Proportion of visitors who bought a package or travel group trip	14%	15%	15%	16%	17%
Average cost of package per person (among package/tour group visitors)	$709.90	$746.69	$640.29	$651.02	$757.83
Number of room occupants (average)	2.2	2.1	2.1	2.0	2.1
Average trip expenditures for food and drink	$254.49	$273.39	$250.32	$256.82	$274.69
Average trip expenditures for local transport	$62.66	$59.26	$53.31	$62.87	$64.25
Average trip expenditures for shopping	$114.50	$121.90	$101.97	$122.80	$129.34
Average trip expenditures for shows	$47.87	$51.64	$39.87	$49.28	$47.52
Average trip expenditures for sightseeing	$8.31	$7.12	$5.77	$7.21	$10.24
Proportion who gambled while visiting Las Vegas	84%	85%	83%	80%	77%
Average trip gambling budget (among those who gambled)	$555.64	$531.98	$481.57	$466.20	$447.63

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 2011. These questions will be rotated back into the questionnaire in Calendar Year 2012 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 2011 (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.

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 2011 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 2011 study, as well as for the previous four calendar years (2007, 2008, 2009, and 2010). 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 2011. These questions will be rotated back into the questionnaire in Calendar Year 2012 and subsequently asked every other year. These questions are noted in the text accompanying the figures in the body of this report.

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

SUMMARY OF FINDINGS

REASONS FOR VISITING

Sixteen percent (16%) of 2011 visitors indicated they were first-time visitors to Las Vegas, not significantly different from past years (Figure 1). Eighty-four percent (84%) were repeat visitors.

FIGURE 1
First Visit Vs. Repeat Visit

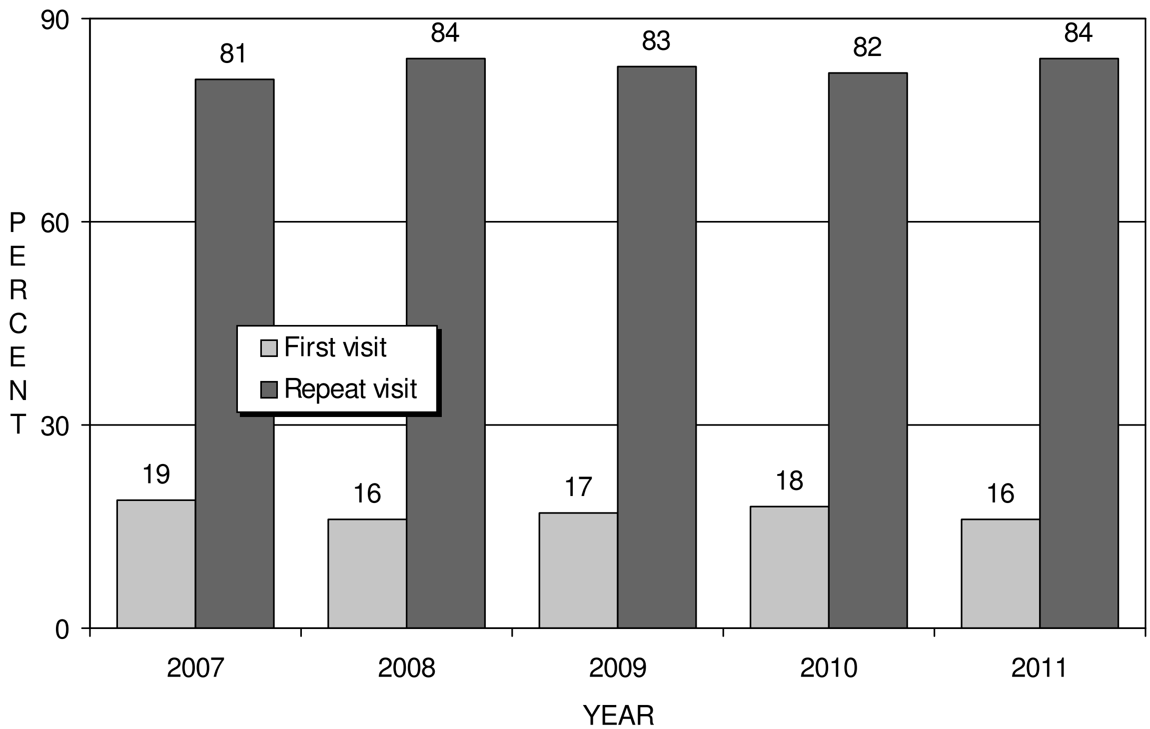
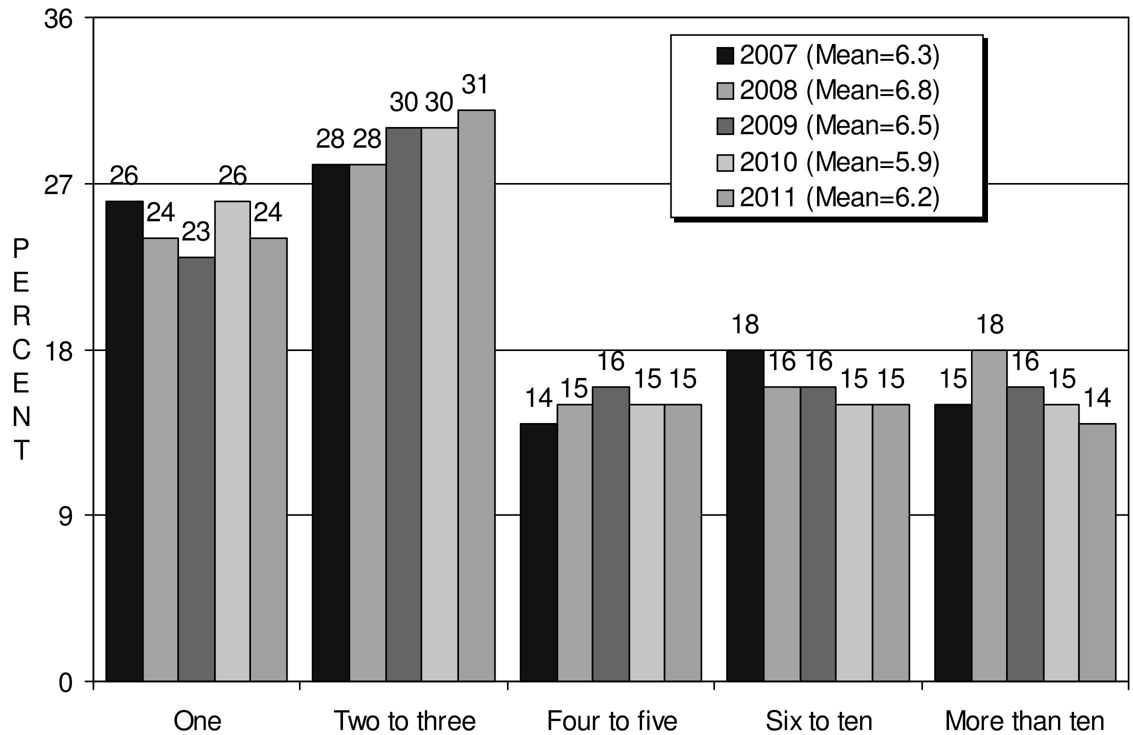
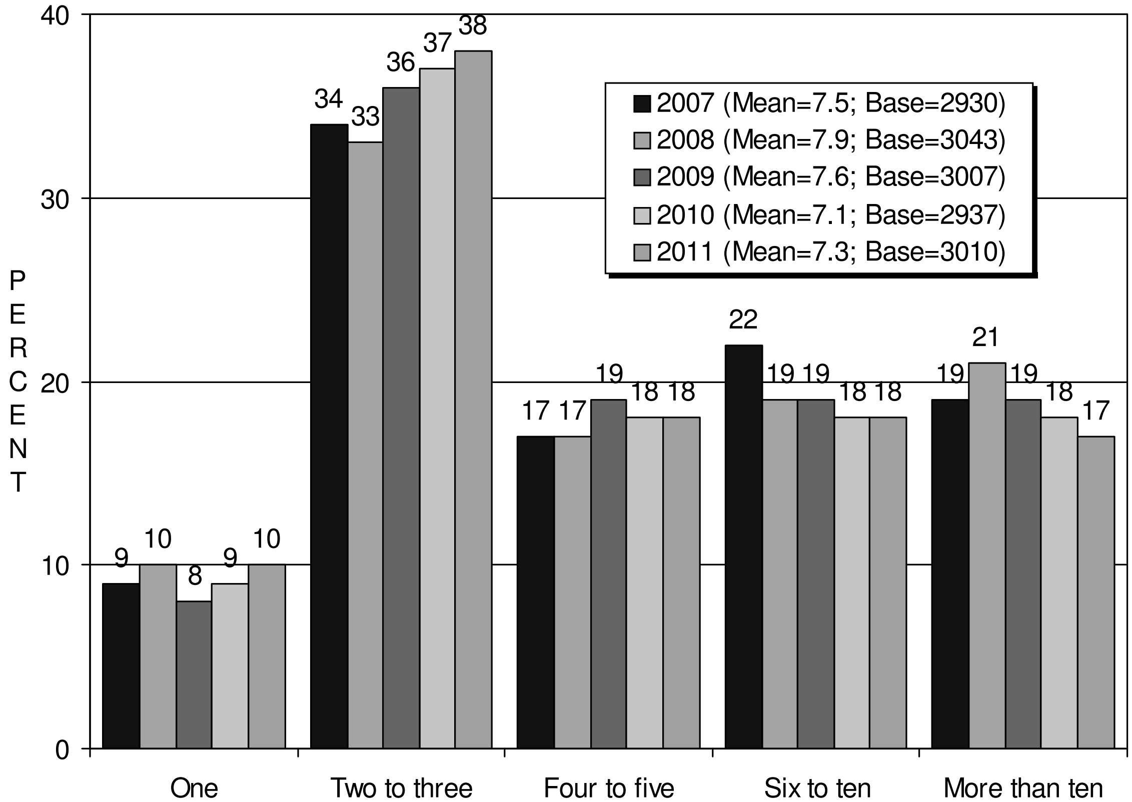


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



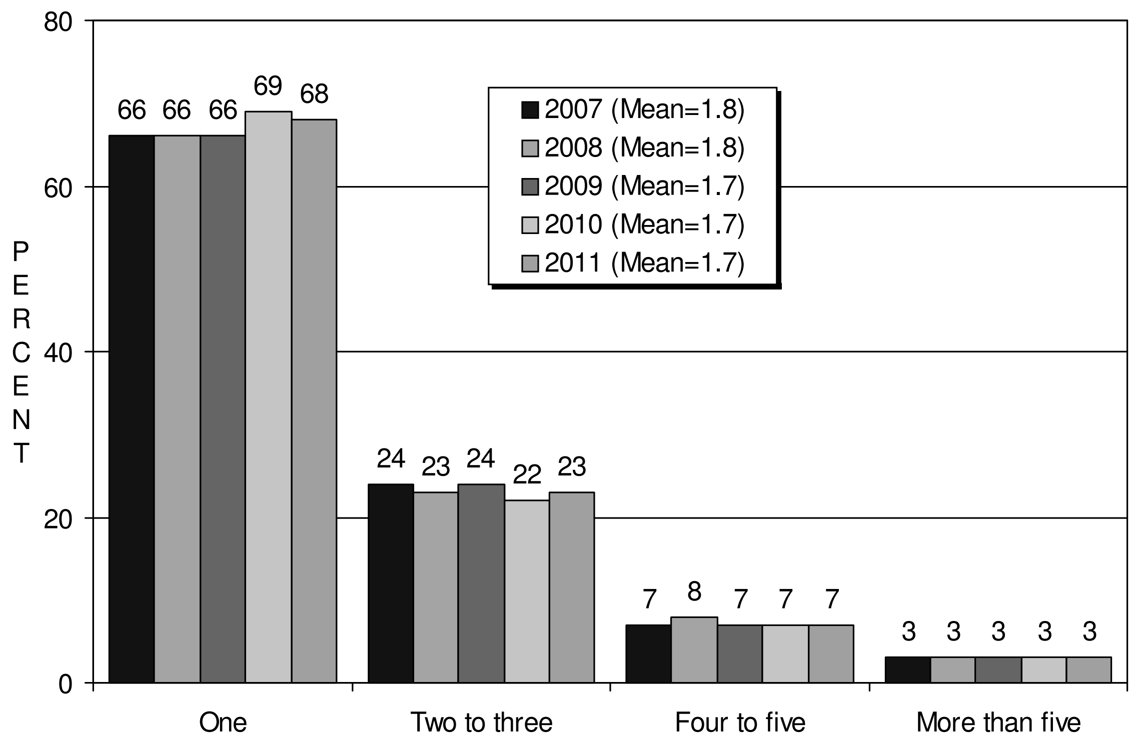
Among all visitors, the average number of visits to Las Vegas over the past five years was 6.2, down significantly from 6.8 in 2008 (Figure 2). Twenty-four percent (24%) of visitors said they visited Las Vegas only once in the past five years and 31% visited two to three times (up from 28% each in 2007 and 2008). Fifteen percent (15%) visited six to 10 times in the past five years (down from 18% in 2007) and another 14% said they visited more than 10 times (down from 18% in 2008 and 16% in 2009).

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



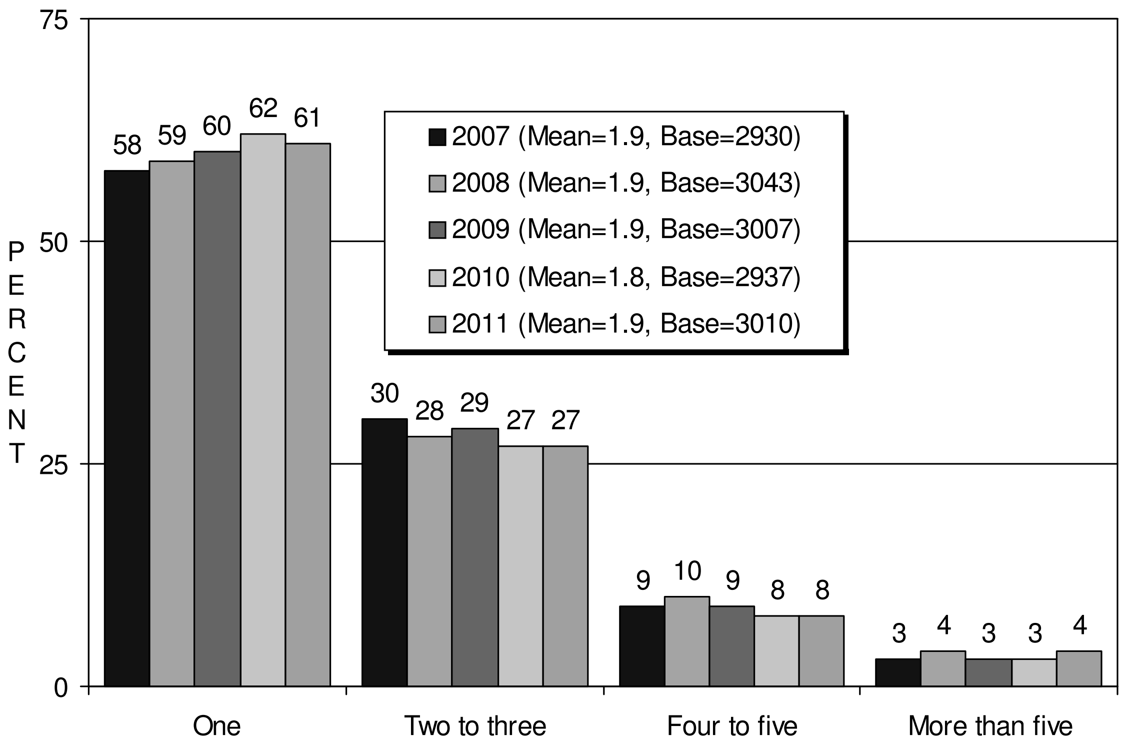
In 2011, *repeat visitors* reported making an average of 7.3 visits to Las Vegas in the past five years, down significantly from 7.9 in 2008 (Figure 3). Ten percent (10%) of repeat visitors said they visited Las Vegas only once in the past five years and 38% visited two to three times (up from 34% in 2007 and 33% in 2008). Eighteen percent (18%) visited six to 10 times in the past five years (down from 22% in 2007) and another 17% said they visited more than 10 times (down from 21% in 2008 and 19% each in 2007 and 2009).

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



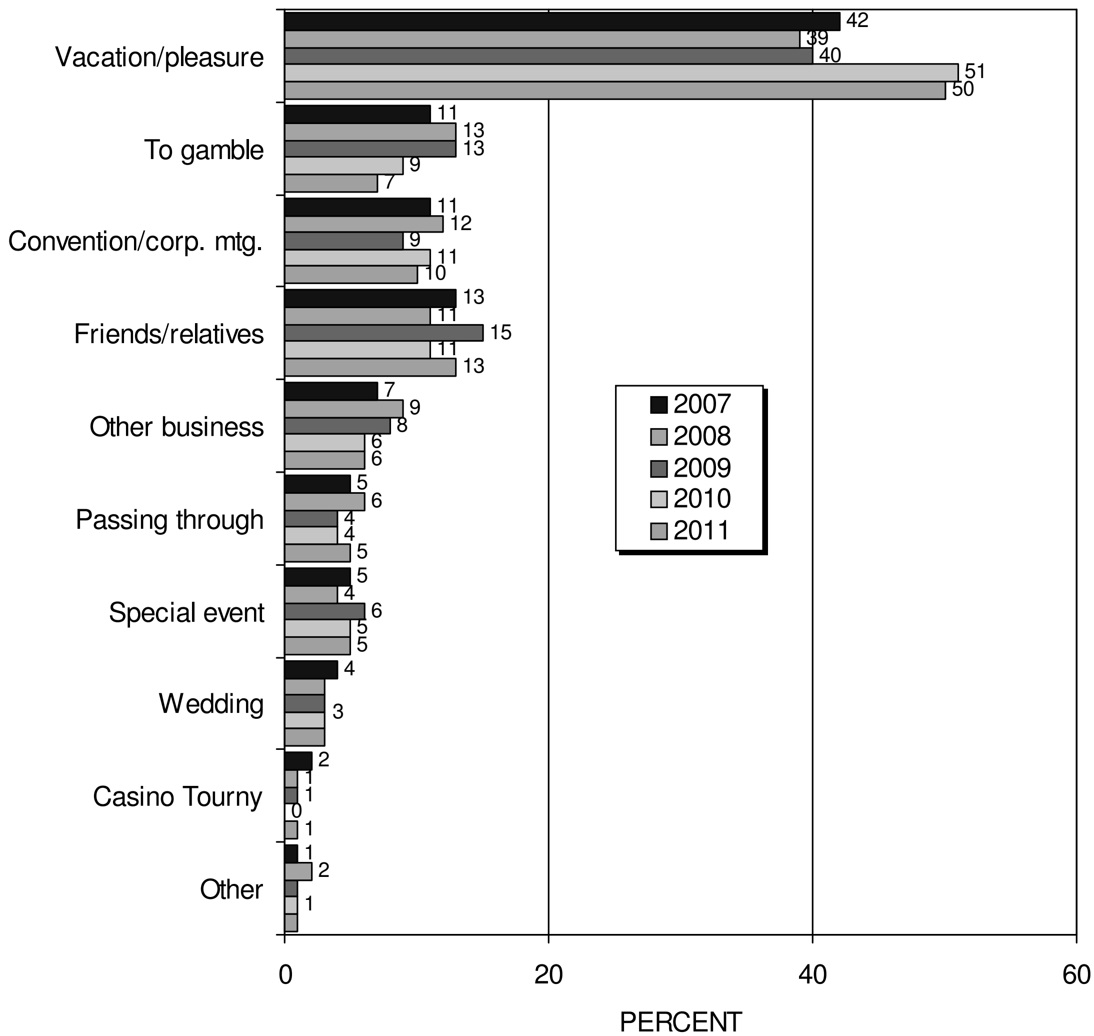
Among all visitors, the average number of visits to Las Vegas in the past 12 months was 1.7, not significantly different from past years (Figure 4). Nearly seven in ten (68%) visitors reported visiting just once in the past year, 23% visited two to three times, 7% visited four to five times, and 3% visited more than five times.

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



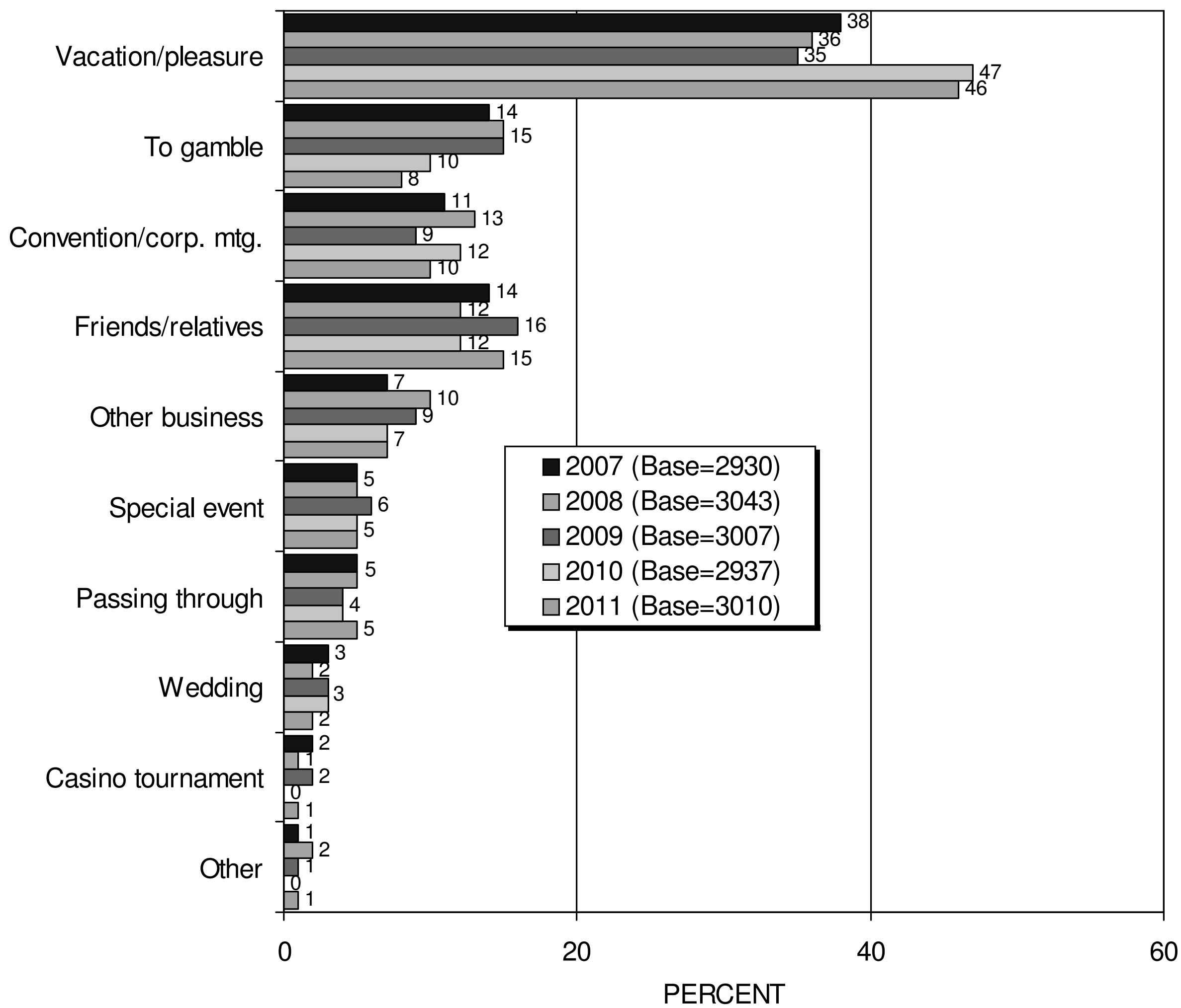
Among *repeat* visitors, the average number of visits to Las Vegas during the past year was 1.9, not significantly different from past years (Figure 5). Sixty-one percent (61%) of repeat visitors reported visiting just once in the past year (up significantly from 58% in 2007), 27% visited two to three times (down from 30% in 2007), and 12% visited four or more times.

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



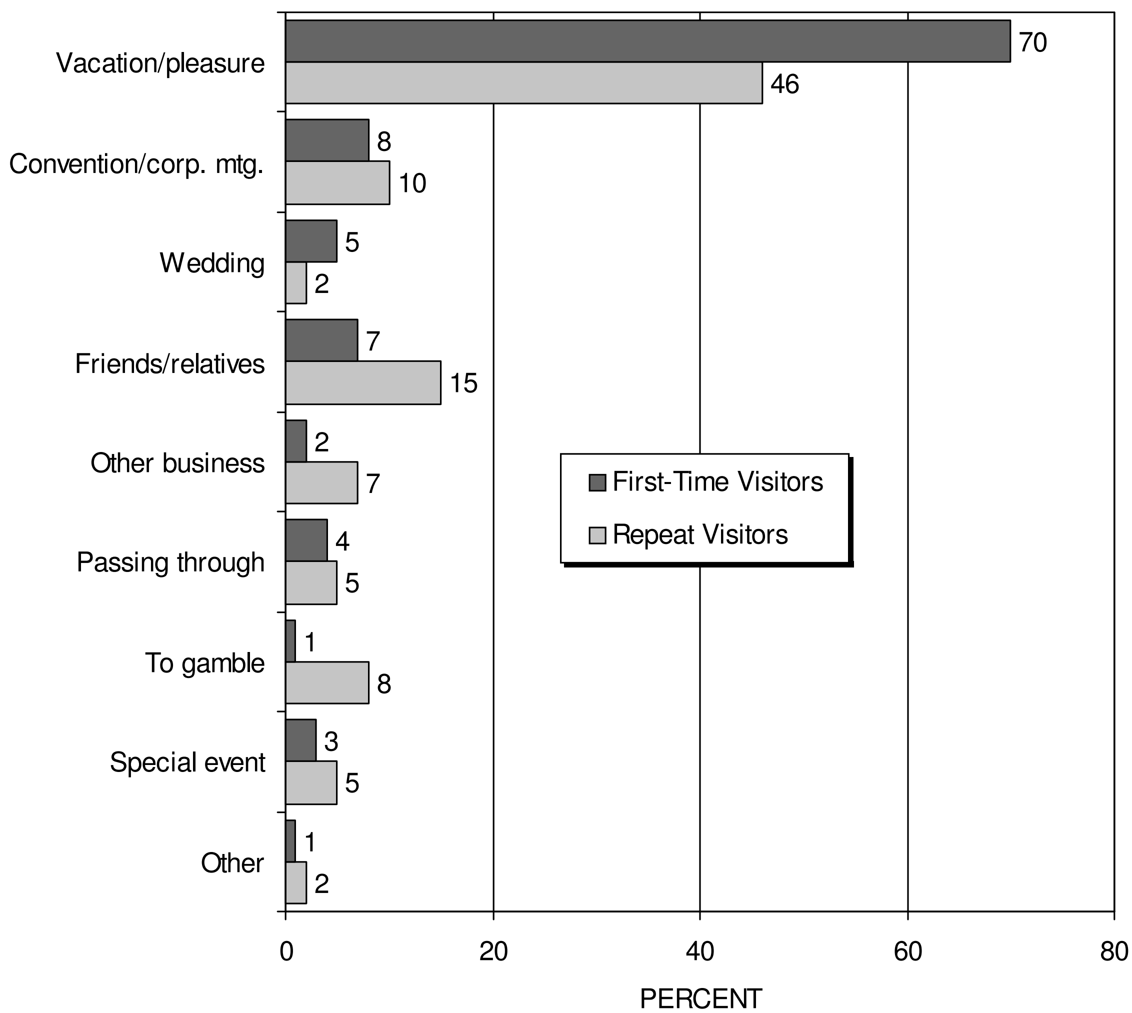
When asked about the primary purpose of their current visit to Las Vegas, one-half (50%) of all visitors mentioned vacation or pleasure, up significantly from 42% in 2007, 39% in 2008, and 40% in 2009 (Figure 6). Seven percent (7%) said they were in Las Vegas primarily to gamble, a significant decrease from 2007-2010 results. Ten percent (10%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 12% in 2008), while 6% were in town on other business (down from 9% in 2008 and 8% in 2009). Thirteen percent (13%) were visiting friends or relatives (up from 11% each in 2008 and 2010). Five percent (5%) said they were in town for a special event, while another 5% said they were just passing through. Three percent (3%) came for a wedding and 1% came for a casino tournament (down from 2% in 2007).

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



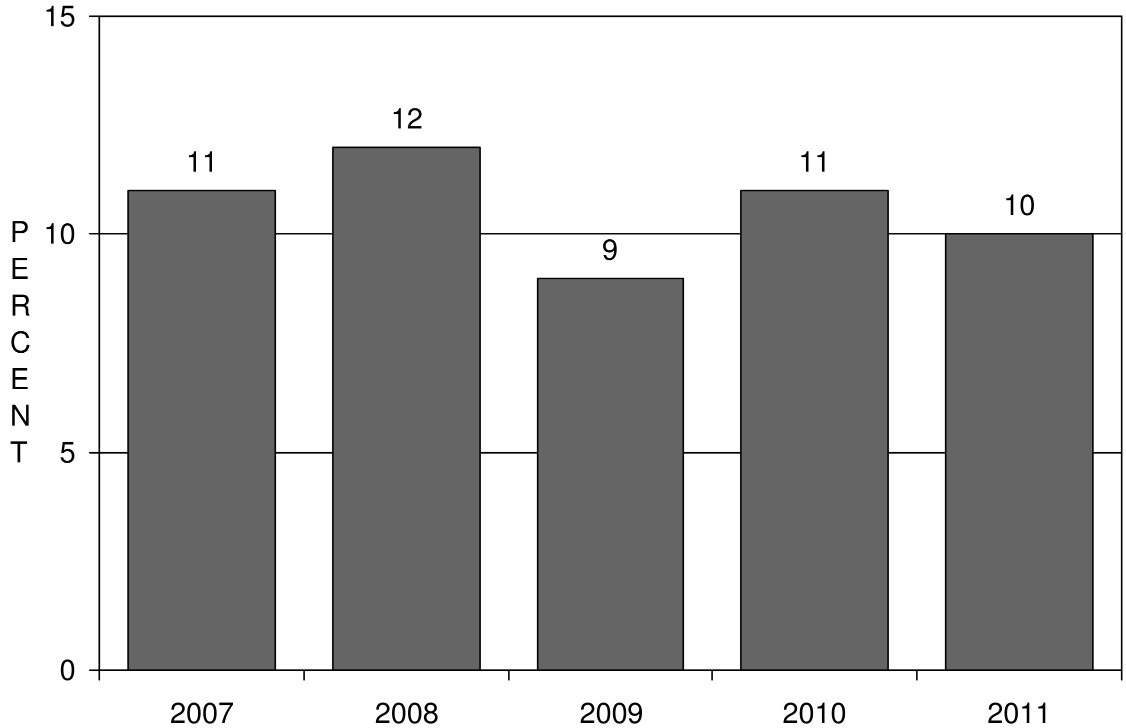
The proportion of *repeat visitors* who said the primary purpose of their current visit to Las Vegas was vacation or pleasure was 46%, up significantly from 38% in 2007, 36% in 2008, and 35% in 2009 (Figure 7). Eight percent (8%) said they were in Las Vegas primarily to gamble, a significant decrease from 2007 – 2010 results. Ten percent (10%) were in Las Vegas to attend a convention, trade show, or corporate meeting (down from 13% in 2008), while 7% were in town on other business (down from 10% in 2008 and 9% in 2009). Fifteen percent (15%) were visiting friends or relatives (up from 12% each in 2008 and 2010). Five percent (5%) said they were in town for a special event, while another 5% said they were just passing through. Two percent (2%) came for a wedding and 1% came for a casino tournament (down from 2% each in 2007 and 2009).

FIGURE 8
Primary Purpose Of Current Visit
(First-Time Versus Repeat Visitors — 2011)



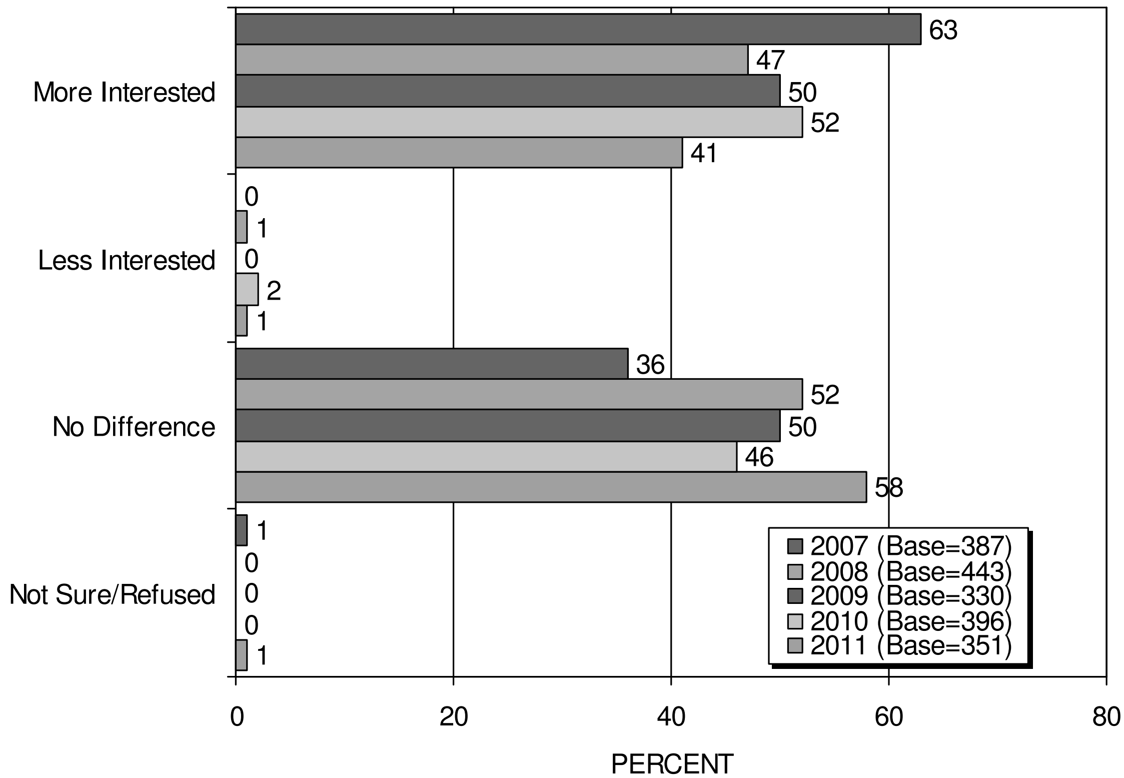
The primary purpose for the current visit among both first-time and repeat visitors is presented in Figure 8. First-time visitors were significantly more likely than repeat visitors to say they were visiting Las Vegas primarily for vacation or pleasure (70% vs. 46%) or for a wedding (5% vs. 2%). Repeat visitors were more likely than first-time visitors to say that their current trip to Las Vegas was to visit friends or relatives (15% vs. 7%), to gamble (8% vs. 1%), for other business purposes (7% vs. 2%), or to attend a special event (5% vs. 3%).

FIGURE 9
Conventions/Trade Shows/Corporate Meetings



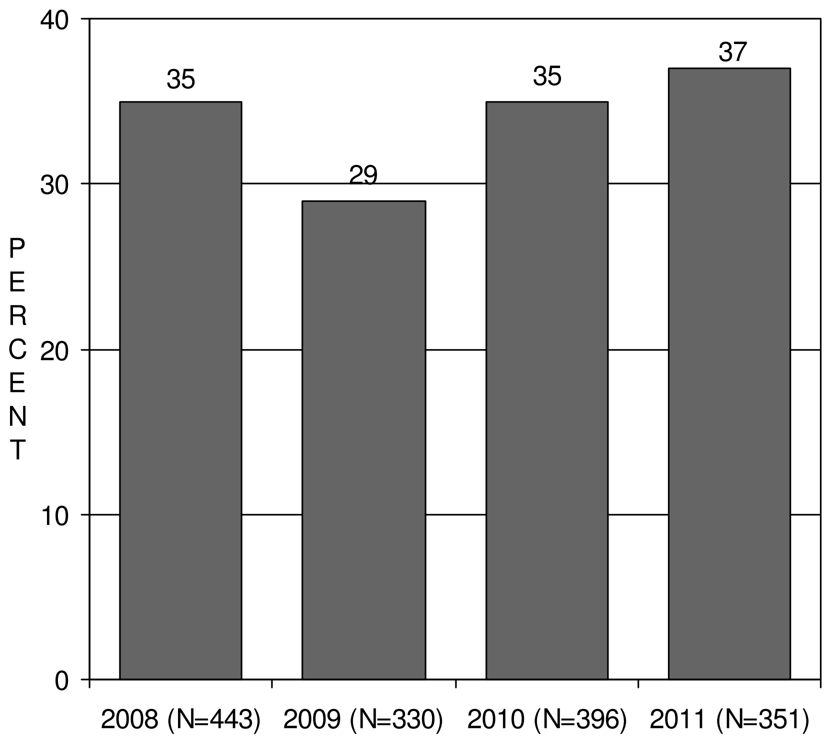
Visitors were asked if they had attended a convention, trade show, or corporate meeting while in Las Vegas (Figure 9). Ten percent (10%) said they had, down from 12% in 2008.

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 2011, 41% said having the convention in Las Vegas made them more interested in attending (down significantly from 63% in 2007, 50% in 2009, and 52% last year), while 58% said it made no difference (up from 36% in 2007 and 46% last year). Only 1% said it made them less interested.

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



Beginning in 2008, convention visitors were asked if they had brought a spouse, family member, or friend who was not attending or working at the convention, trade show, or corporate meeting with them. Thirty-seven percent (37%) of convention visitors in 2011 said they had, up from 29% in 2009 (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. One-half (50%) of visitors in 2011 planned their trip to Las Vegas more than one month in advance (Figure 12), down significantly from 63% each in 2007 and 2008, and 55% in 2009. Forty-five percent (45%) planned their trip from one week to one month in advance, up from 33% each in 2007 and 2008 and 41% in 2009. Four percent (4%) planned their trip one to three days in advance, up from 3% each in 2007 – 2009.

FIGURE 12
Advance Travel Planning

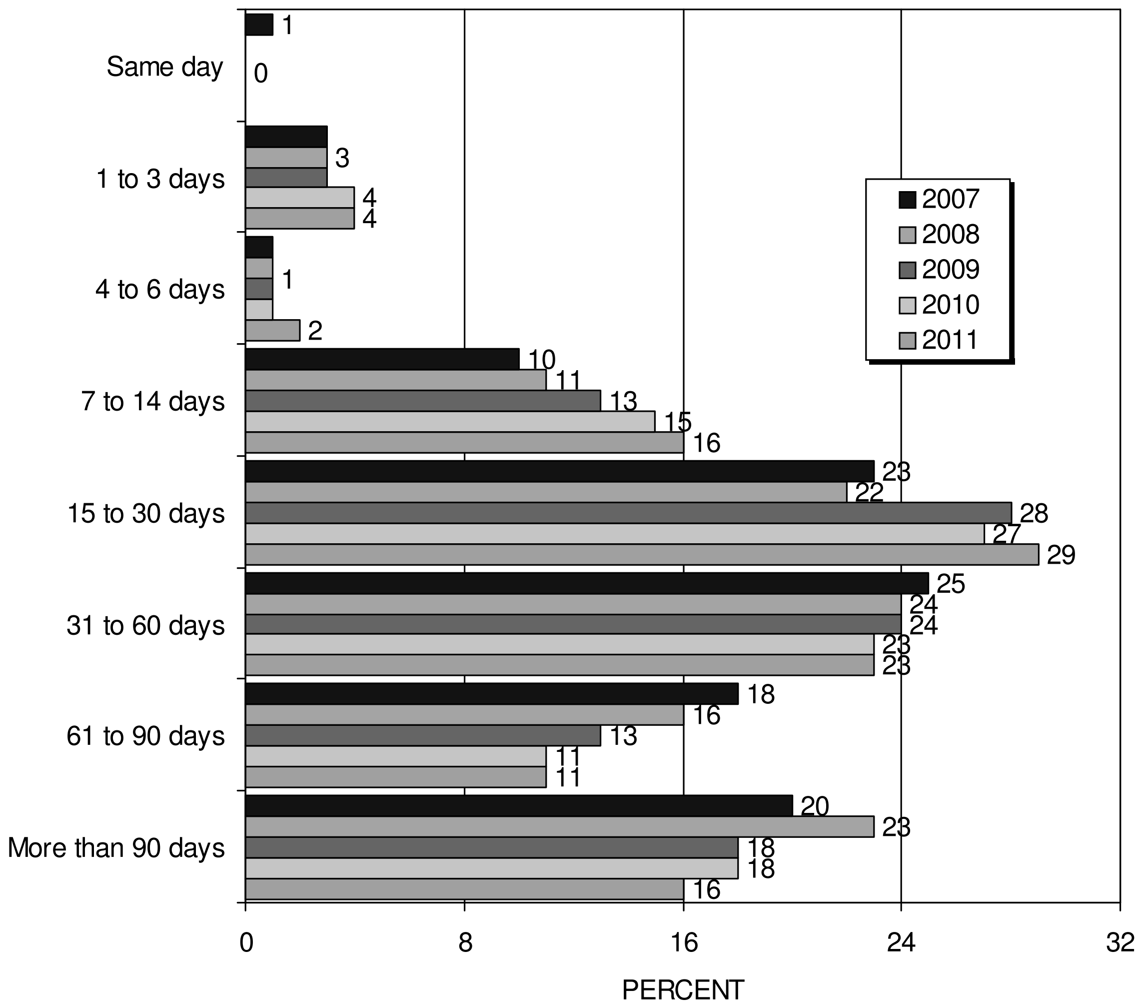
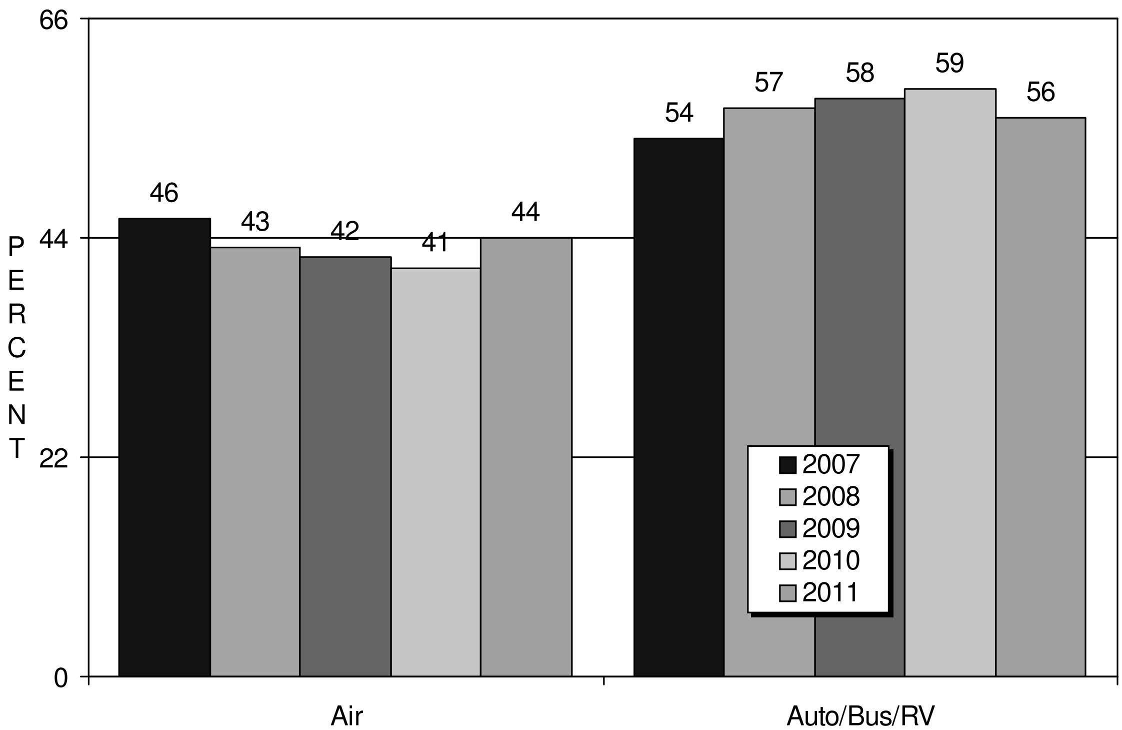
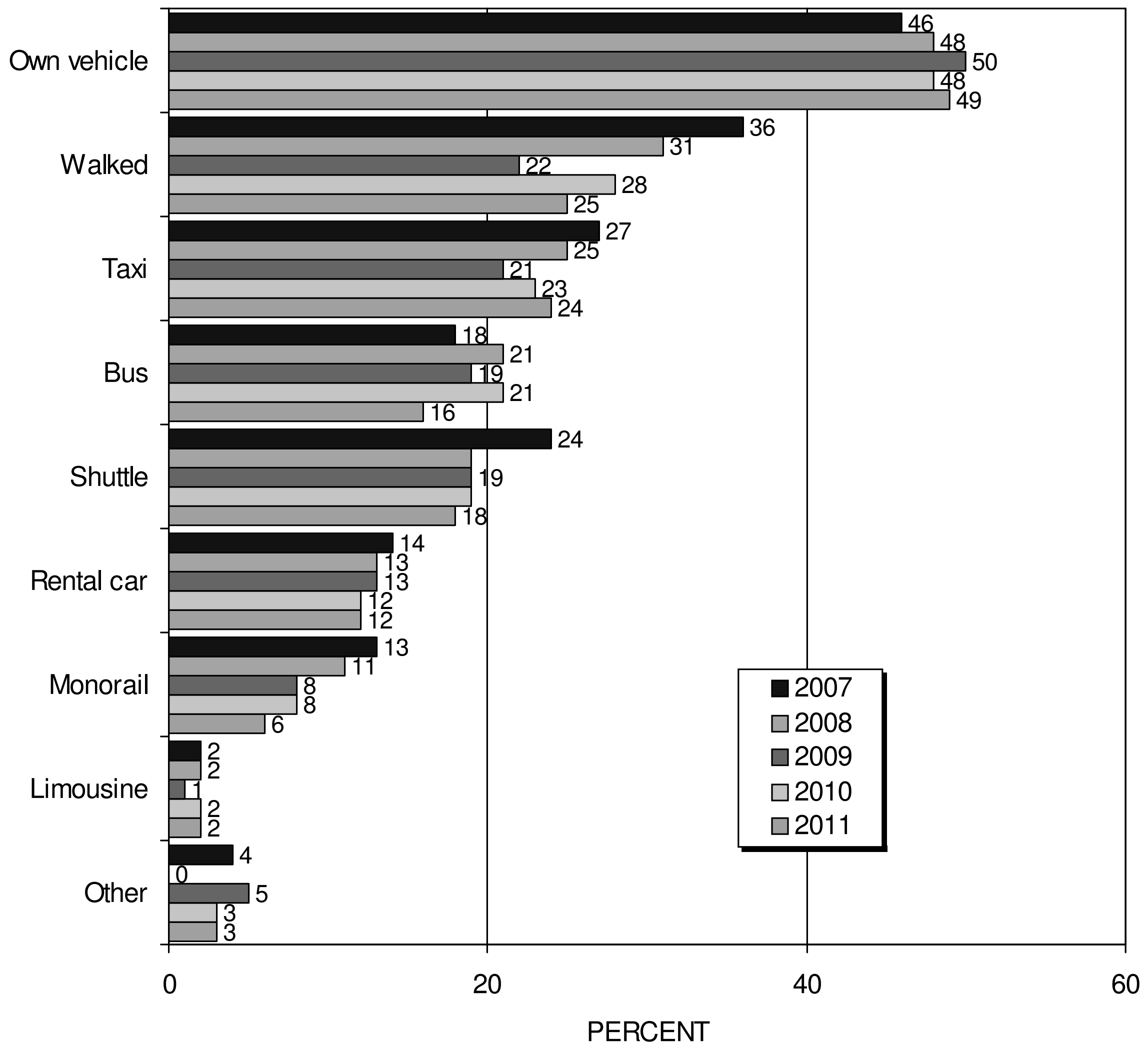


FIGURE 13
Transportation To Las Vegas



Forty-four percent (44%) of visitors to Las Vegas in 2011 arrived by air, up significantly from 41% last year, while 56% arrived by ground transportation, down from 59% in 2010 (Figure 13).

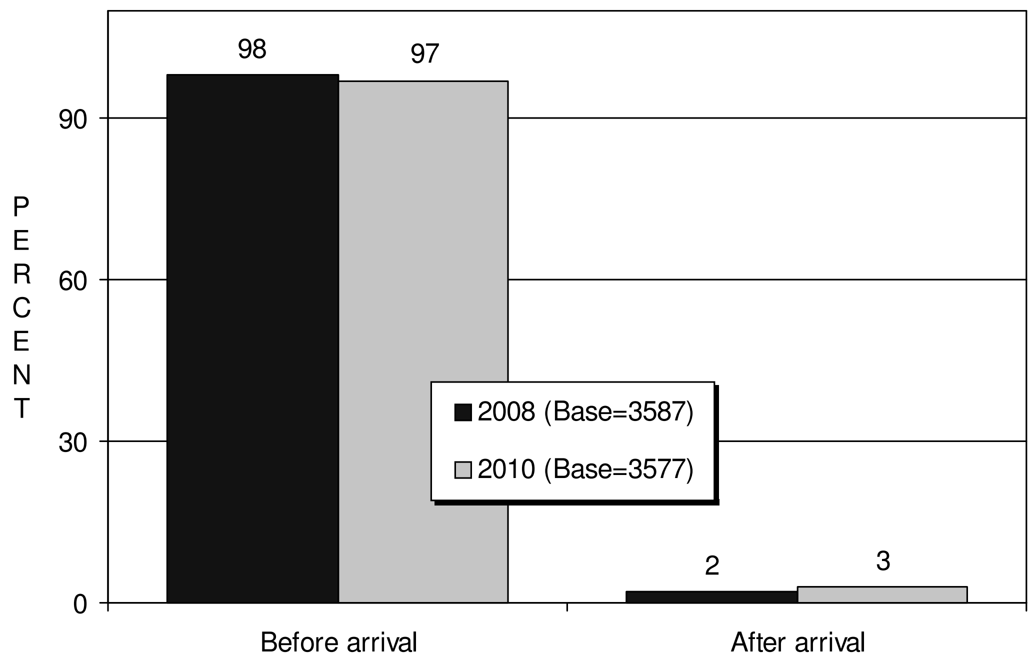
FIGURE 14
Local Transportation*



Forty-nine percent (49%) of visitors said that they used their own vehicle when traveling around Las Vegas, similar to prior years (Figure 14). Twenty-five percent (25%) volunteered that they walked while in Las Vegas, down from 36% in 2007, 31% in 2008, and 28% last year. Twenty-four percent (24%) reported taking a taxi (up from 21% in 2009), while 16% reported taking a bus (down from 21% each in 2008 and 2010, and 19% in 2009), 18% reported using a hotel shuttle (down from 24% in 2007), and 12% used a rental car. Monorail use (6%) was down significantly from prior years.

* Multiple responses to this question were permitted.

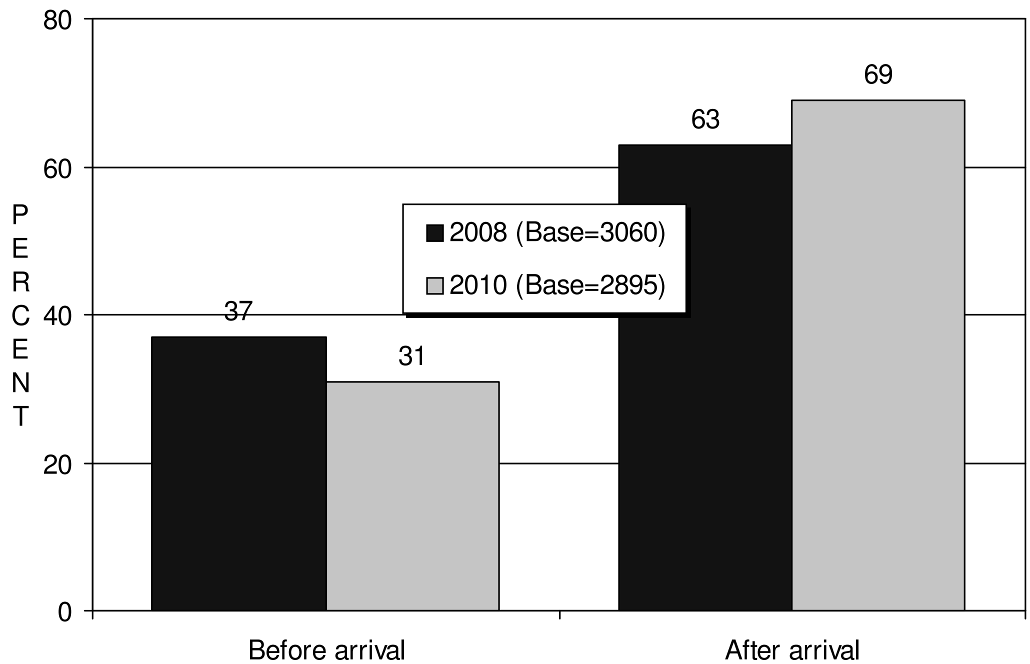
FIGURE 15
When Decided Where To Stay*
(Among Those Who Stayed Overnight – Asked Every Other Year)



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

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

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



About seven in ten (69%) visitors decided where to gamble after arriving in Las Vegas, up significantly from 63% in 2008 (Figure 16). Three in ten (31%) visitors decided where to gamble before leaving home, down from 37% in 2008.

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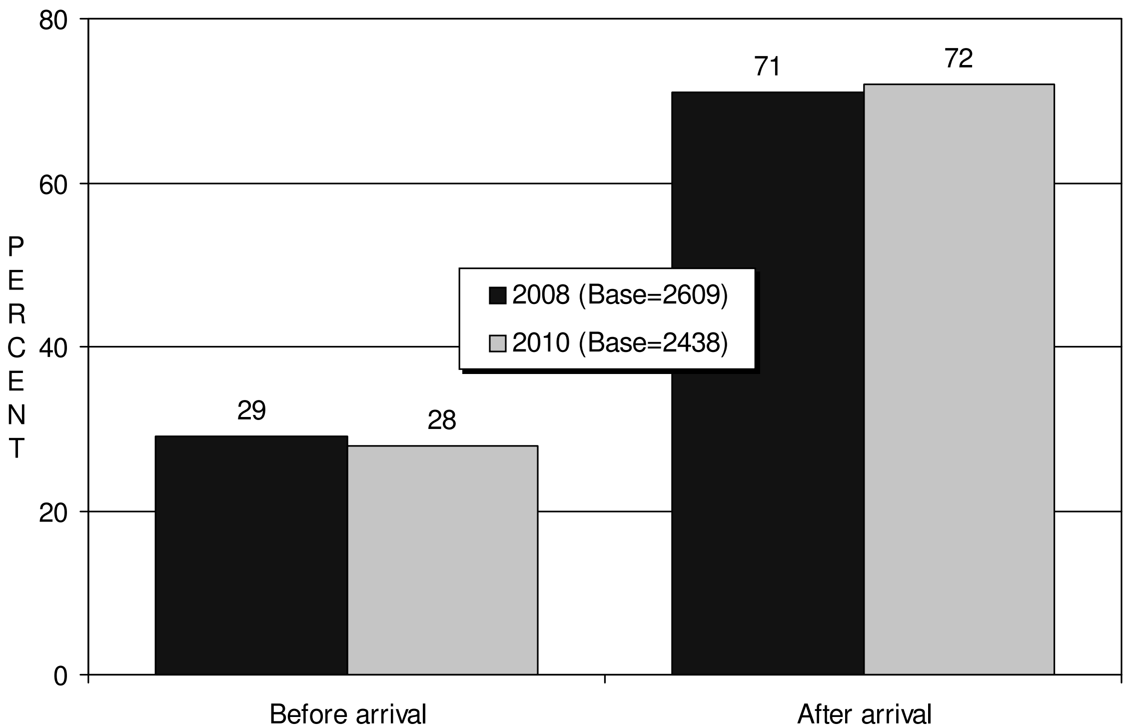
* This question is asked every other year and was not asked in 2007, 2009, or 2011.

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



About seven in ten (72%) visitors in 2010 decided which shows to see after arrival, similar to 2008 results, while nearly three in ten (28%) decided before leaving home (Figure 17).

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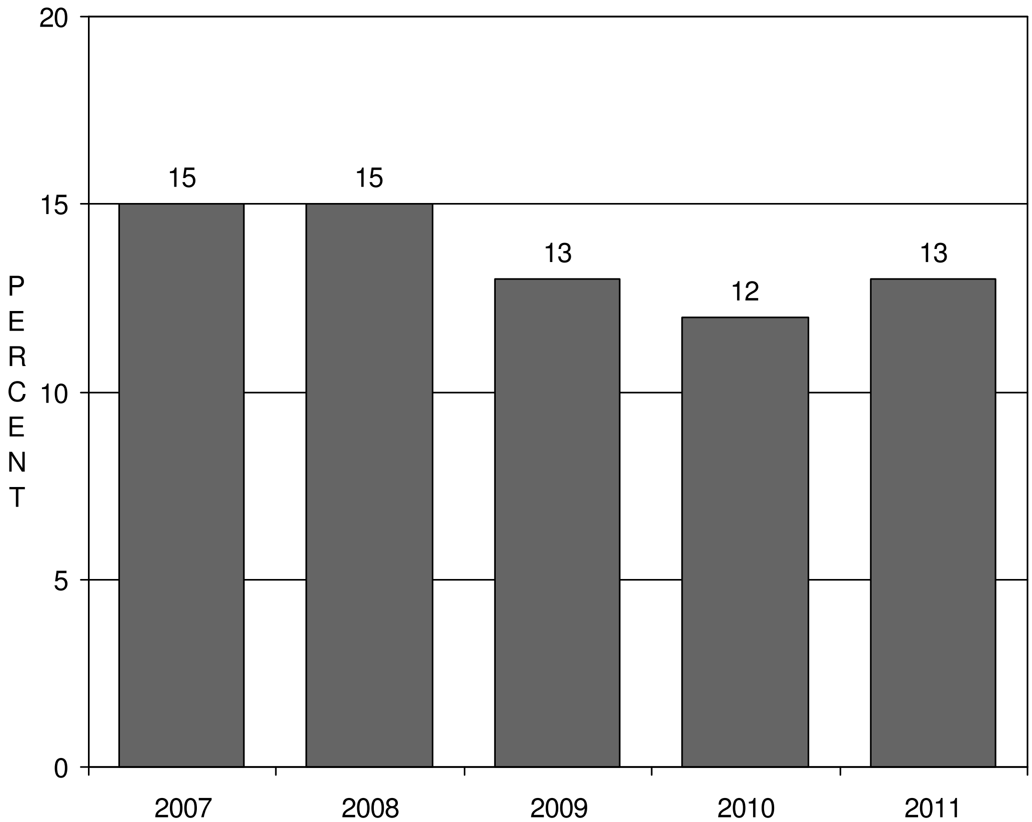
* This question is asked every other year and was not asked in 2007, 2009, or 2011.

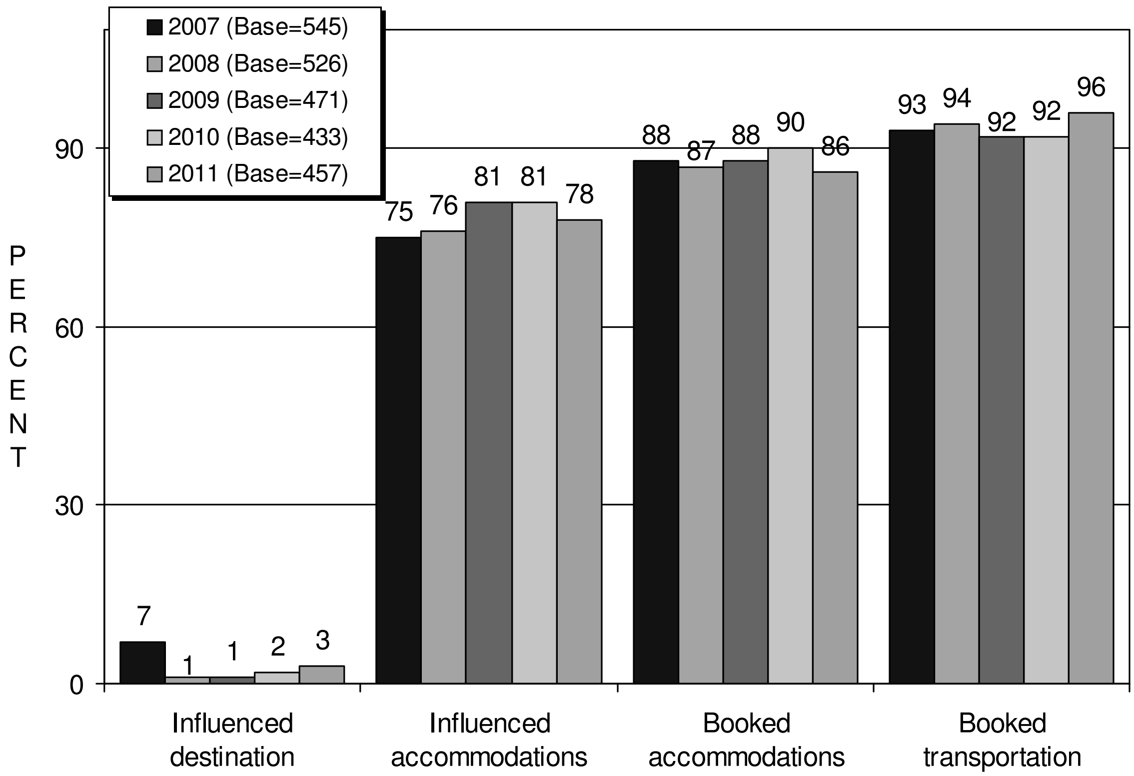
FIGURE 18
Travel Agent Assistance*



Thirteen percent (13%) of visitors reported using a travel agent to plan their trip to Las Vegas, down from 15% each in 2007 and 2008 (Figure 18).

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

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

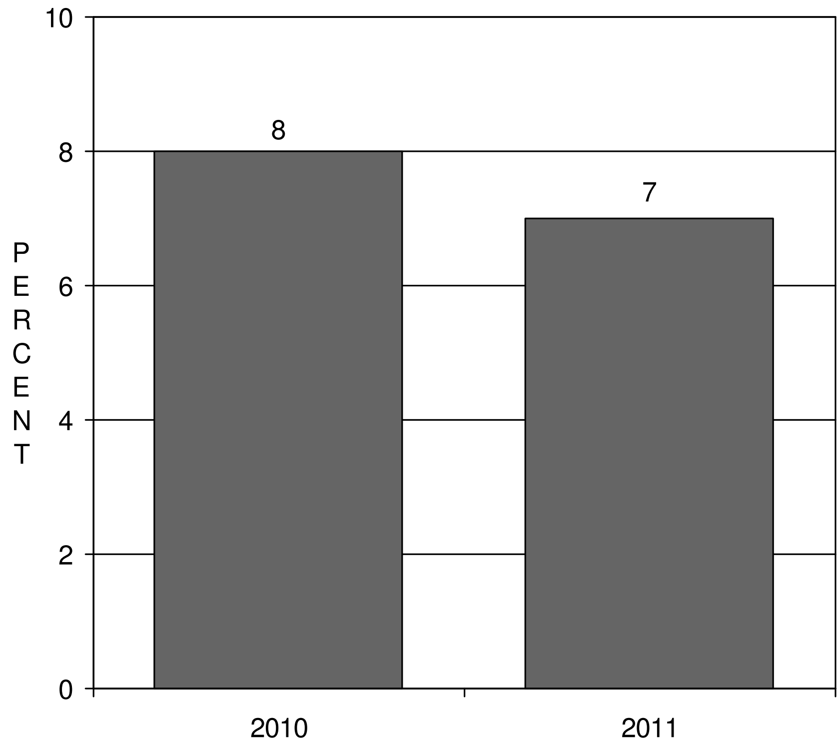


Among those visitors who used a travel agent to plan their trip to Las Vegas (Figure 19), 86% said the travel agent booked their accommodations (similar to prior years), while 96% said the travel agent booked their transportation (up significantly from 93% in 2007 and 92% each in 2009 and 2010).

Seventy- eight percent (78%) of visitors said their travel agent influenced their choice of accommodations in Las Vegas, while 3% said the travel agent influenced their choice of destination (down from 7% in 2007).

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

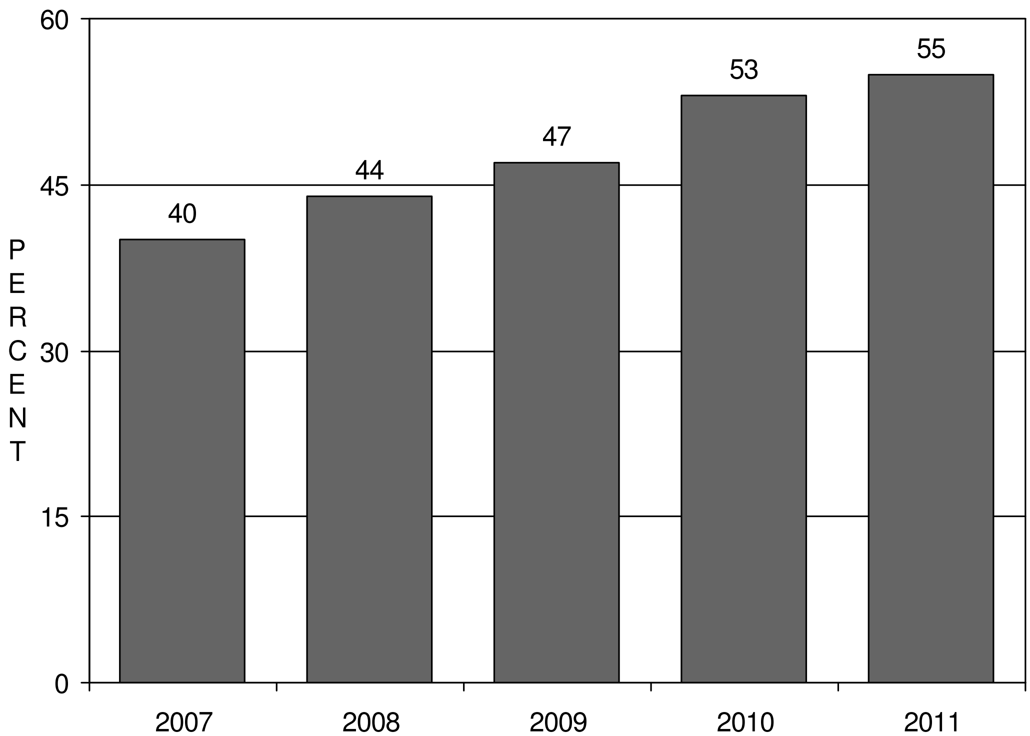
FIGURE 20
Whether Used Social Media Web Sites To Plan Trip*



Beginning in 2010, visitors were asked if they used any social media web sites, such as Facebook, Twitter, or others, to help in planning their trip to Las Vegas. In 2011 7% of visitors said they had, not significantly different from last year (Figure 20).

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

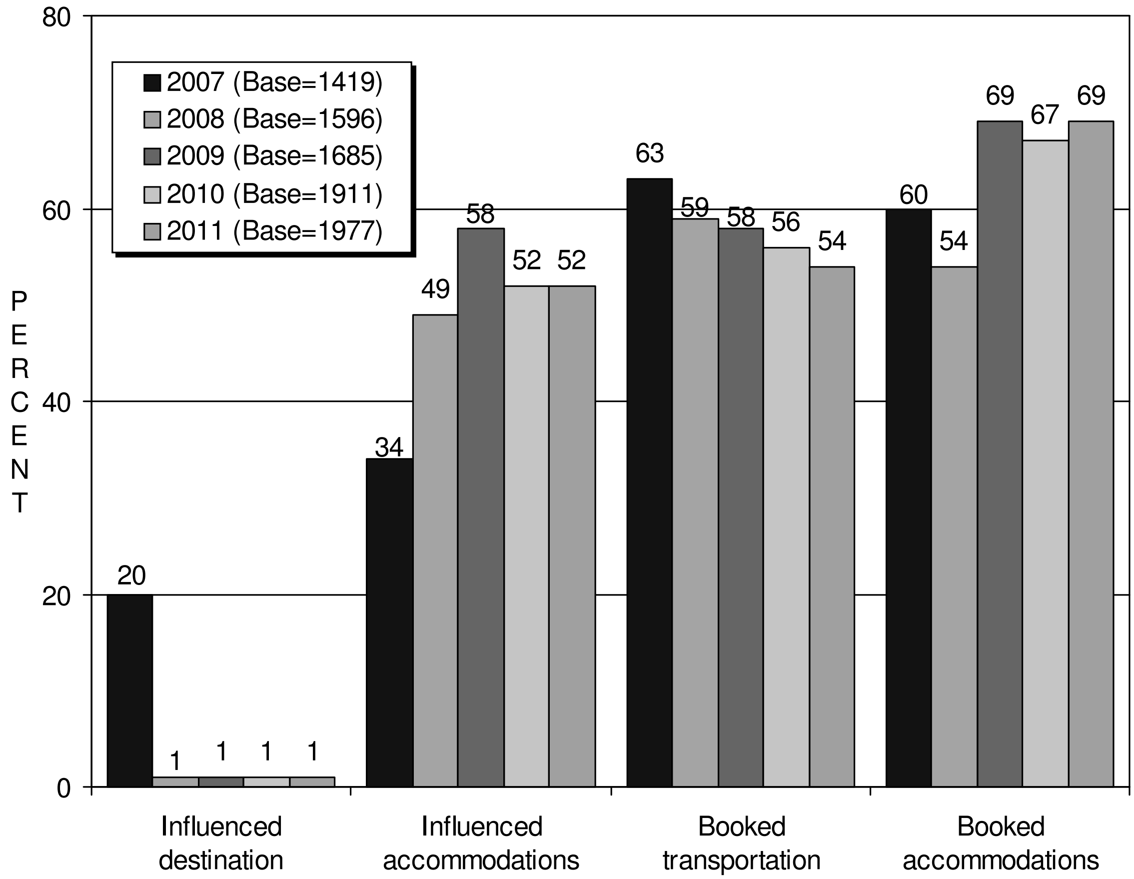
FIGURE 21
Whether Used The Internet To Plan Trip*



Visitors were asked if they used the Internet to plan their trip, and over one-half (55%) said yes, up significantly from 40% in 2007, 44% in 2008, and 47% in 2009 (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, 54% said they booked their transportation online, down significantly from 63% in 2007, 59% in 2008, and 58% in 2009 (Figure 22). Over two-thirds (69%) said they booked their accommodations online, up significantly from 60% in 2007 and 54% in 2008. Over one-half (52%) said the Internet influenced their choice of accommodations, up significantly from 34% in 2007 and 49% in 2008.

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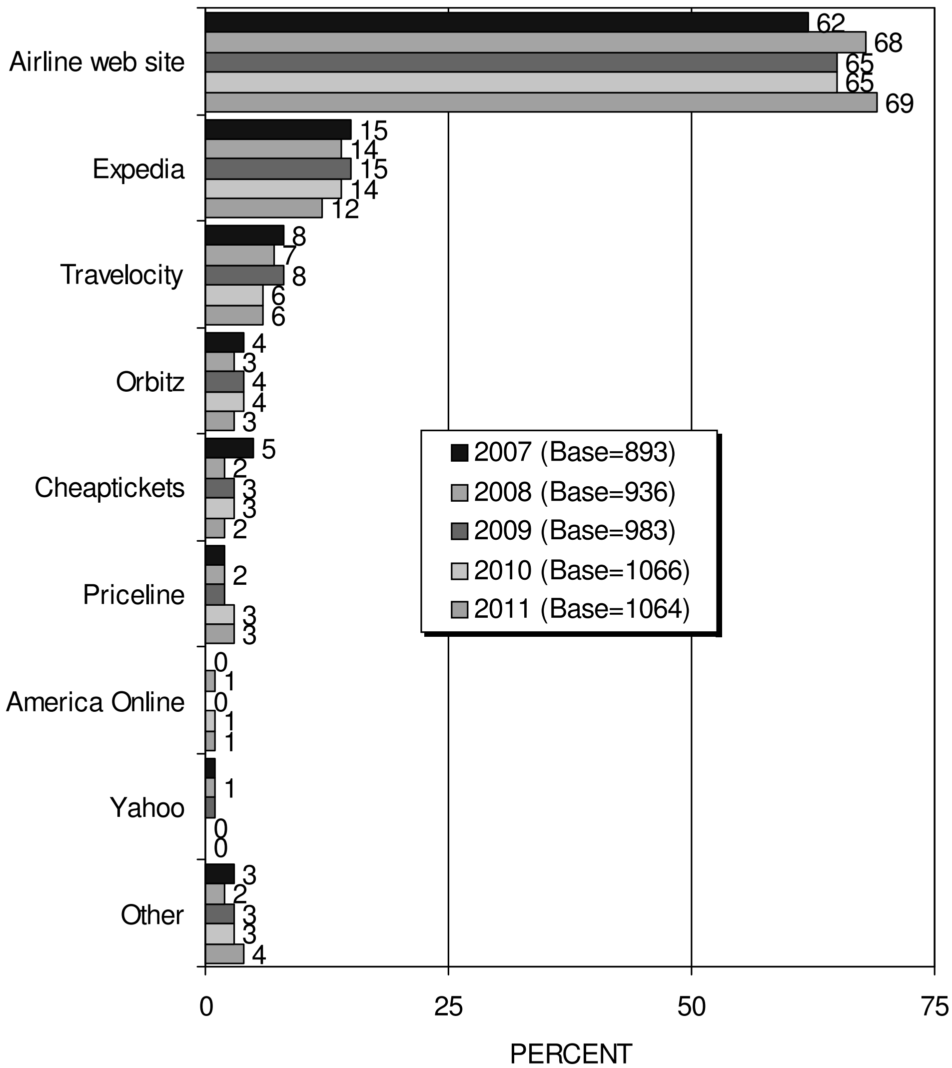
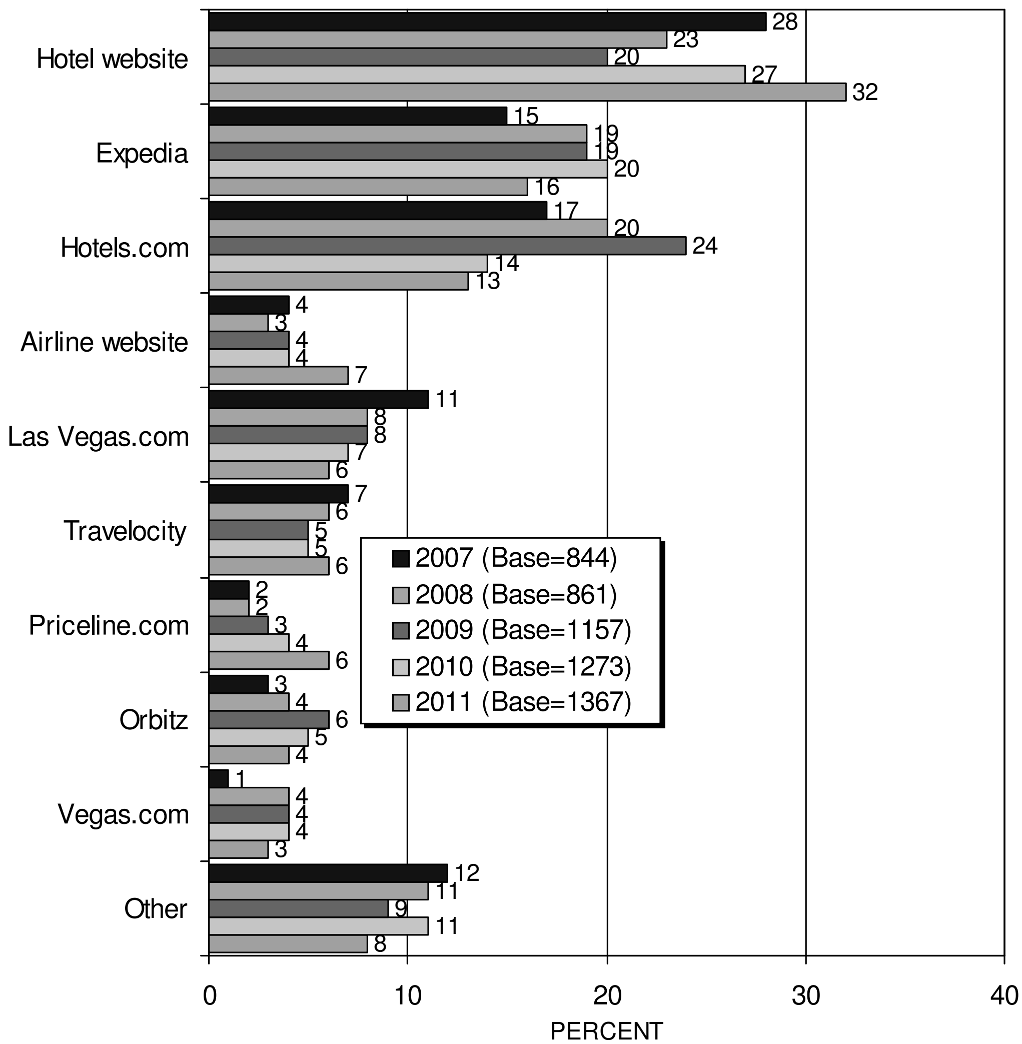
* Only "yes" responses are reported in this chart.

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



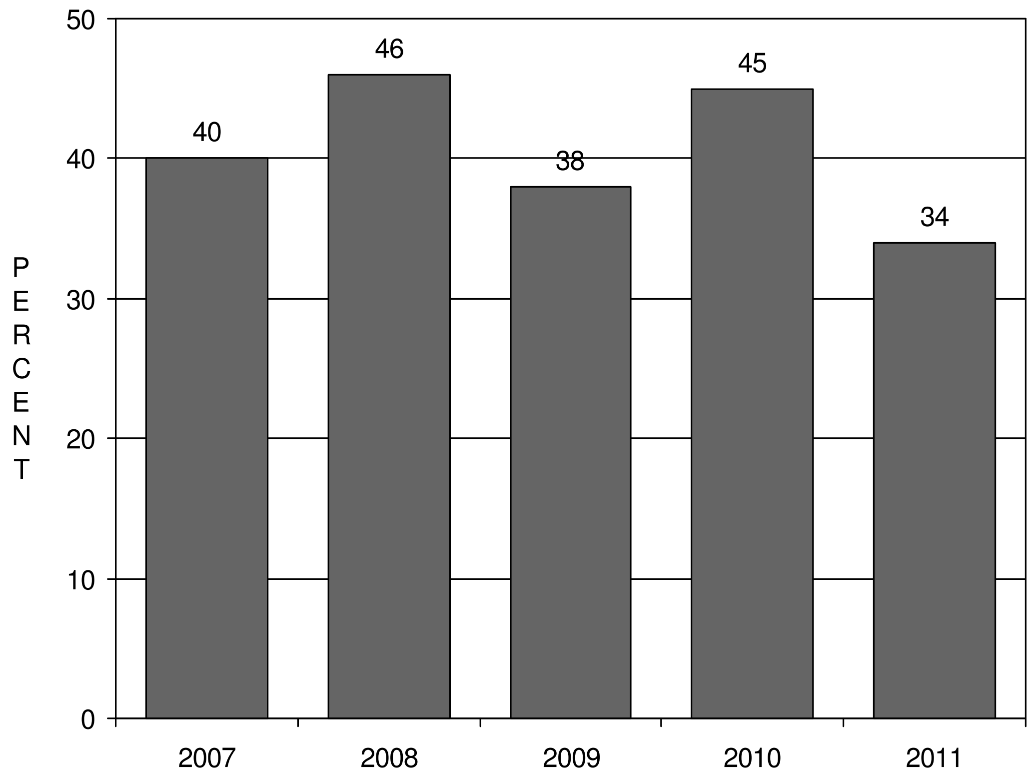
Among those who booked their transportation to Las Vegas online, over two-thirds (69%) said they used an airline website, up from 62% in 2007 and 65% each in 2009 and last year (Figure 23). Twelve percent (12%) said they used Expedia, down from 2007 – 2010 results. Six percent (6%) used Travelocity, 3% said Orbitz, another 3% said Priceline (down from 2% each from 2007 – 2009), and 2% said Cheaptickets (down from 5% in 2007).

FIGURE 24
Website Used To Book Accommodations
(Among Those Who Booked Their
Accommodations In Las Vegas Online)



Among those who booked their accommodations online for their current trip to Las Vegas, nearly one-third (32%) said they used a hotel website, up from 23% in 2008, 20% in 2009, and 27% in 2010 (Figure 24). Sixteen percent (16%) used Expedia (down from 20% last year), while 13% said they used Hotels.com (down from 17% in 2007, 20% in 2008, and 24% in 2009). Seven percent (7%) used an airline website, up from prior years. Six percent (6%) used LasVegas.com (down from 11% in 2007), another 6% each used Travelocity or Priceline (up from 2007 – 2009 results), while the remaining visitors used a variety of other websites.

FIGURE 25
Whether Visited Downtown Las Vegas*



Thirty-four percent (34%) of visitors said they had visited Downtown Las Vegas on their current trip, down from 40% in 2007, 46% in 2008, 38% in 2009, and 45% last year (Figure 25).

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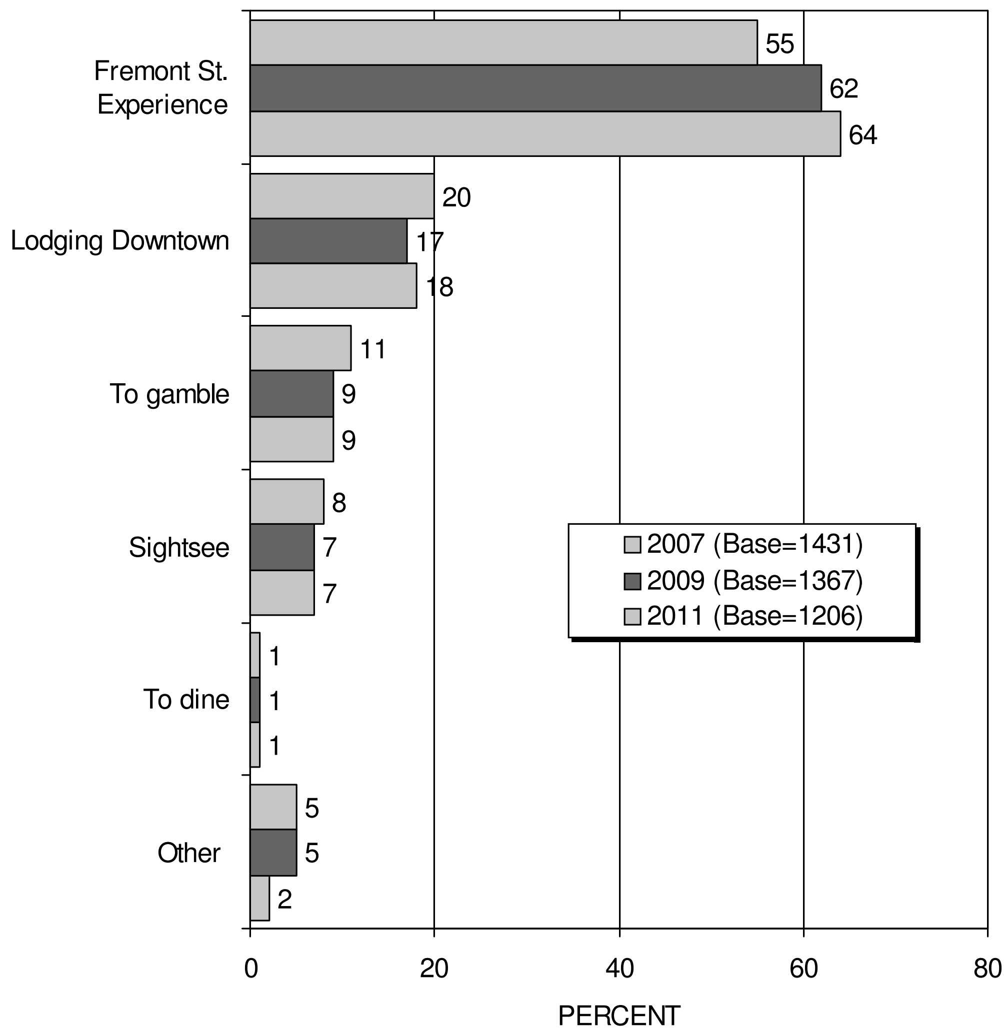
* Only “yes” responses are reported in this chart.

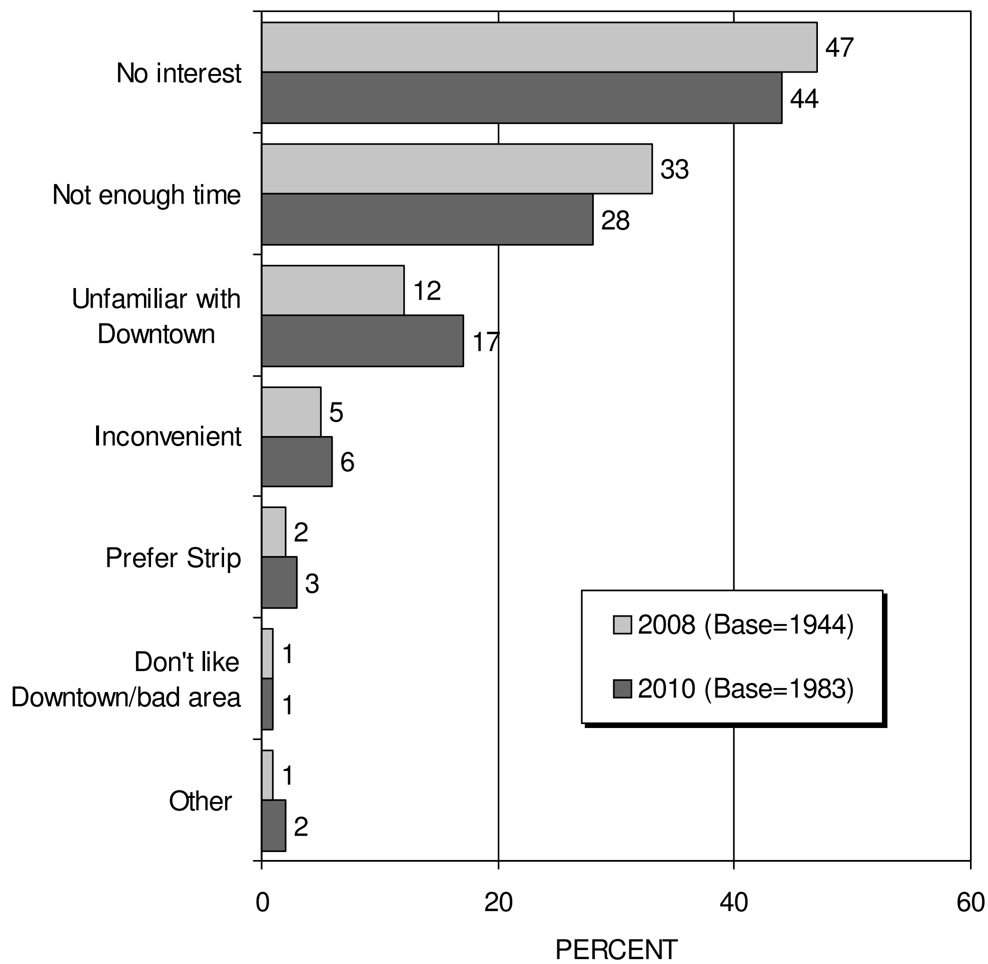
FIGURE 26
Main Reason For Visiting Downtown Las Vegas*
(Among Those Who Visited Downtown — Asked Every Other Year)



Visitors who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so (Figure 26). More than six in ten (64%) said it was to see the Fremont Street Experience, up from 55% in 2007. Eighteen percent (18%) said they were lodging Downtown and 9% said they went Downtown primarily to gamble. The number who said they visited Downtown primarily to sightsee was 7%.

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

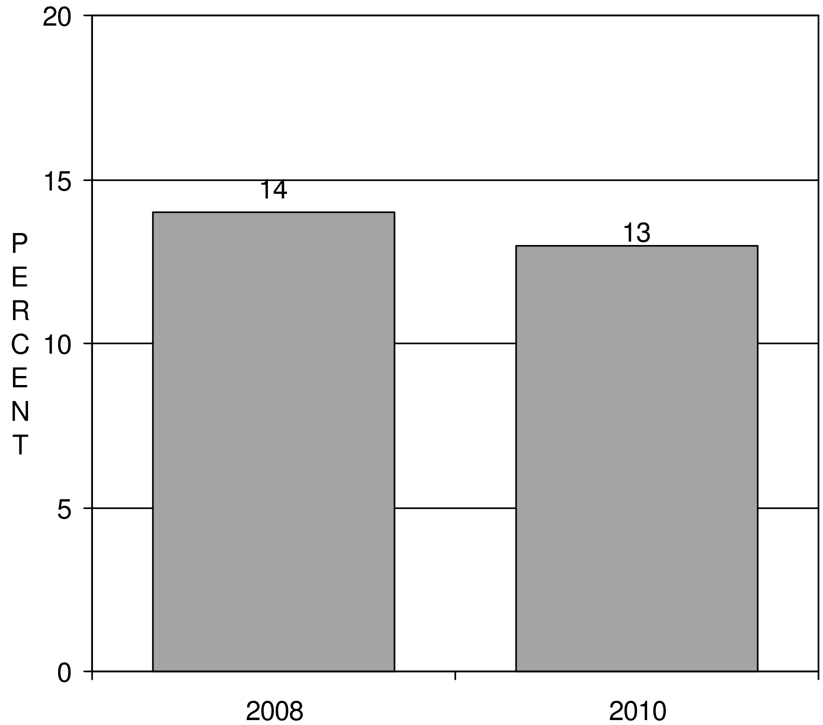
FIGURE 27
Main Reason For Not Visiting Downtown Las Vegas*
(Among Those Who Did Not Visit Downtown —
Asked Every Other Year)



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 four in ten (44%) said it was because they were not interested in Downtown. Over one-quarter (28%) said it was because they did not have enough time (down from 33% in 2008), while 17% said they were unfamiliar with Downtown (up from 12% in 2008). Six percent (6%) of visitors said they did not go Downtown because it was inconvenient and 3% said they prefer the Strip area (up from 2% in 2008).

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

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



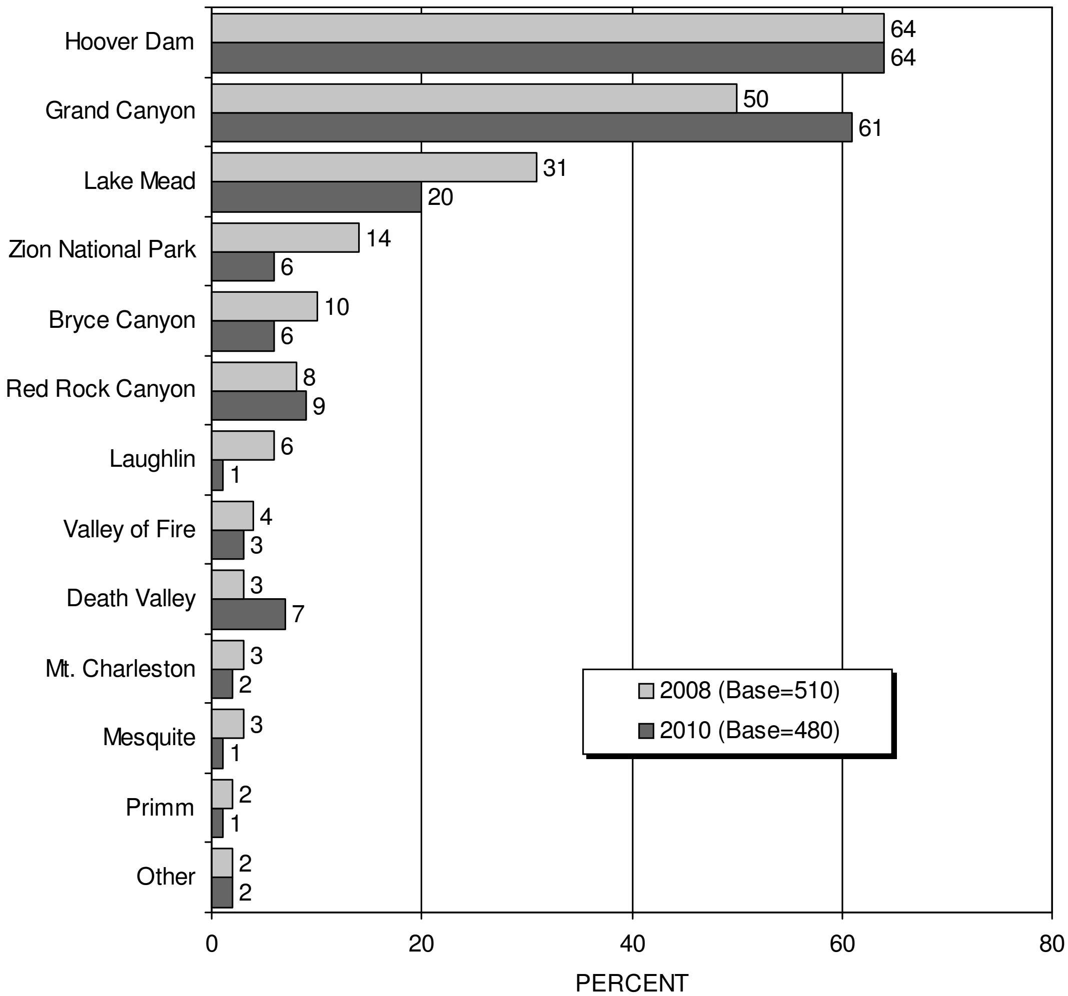
Visitors were asked if they visited any nearby places before or after their trip to Las Vegas (Figure 28). Thirteen percent (13%) of visitors said they had, not significantly different from 2008 results.

---

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

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

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



Visitors were asked what other nearby destinations they had visited, or planned to visit (Figure 29). In 2010, visitors were most likely to say Hoover Dam (64%) and the Grand Canyon (61%, up from 50% in 2008). Two in ten (20%) said Lake Mead (down from 31% in 2008), while 9% mentioned Red Rock, 7% said Death Valley (up from 3% in 2008), and 6% each mentioned Zion National Park (down from 14% in 2008) or Bryce Canyon. One percent (1%) each mentioned Laughlin (down from 6% in 2008), Mesquite (down from 3% in 2008), and Primm.

* Multiple responses were permitted.

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

TRIP CHARACTERISTICS AND EXPENDITURES

Seven in ten visitors (70%) traveled in parties of two, not significantly different form past years (Figure 30). Seven percent (7%) said they were in a party of three (up from 5% each in 2009 and last year), while 9% were in a party of four (down from 11% each in 2007 and 2010), and 4% were in a party of five or more (down from 6% in 2007). Eleven percent (11%) of visitors traveled alone, the same as the past three years, but up from 8% in 2007. The average party size in 2011 was 2.3 persons, down from 2.5 in 2007 and 2.4 each from 2008 – 2010.

FIGURE 30
Adults In Immediate Party

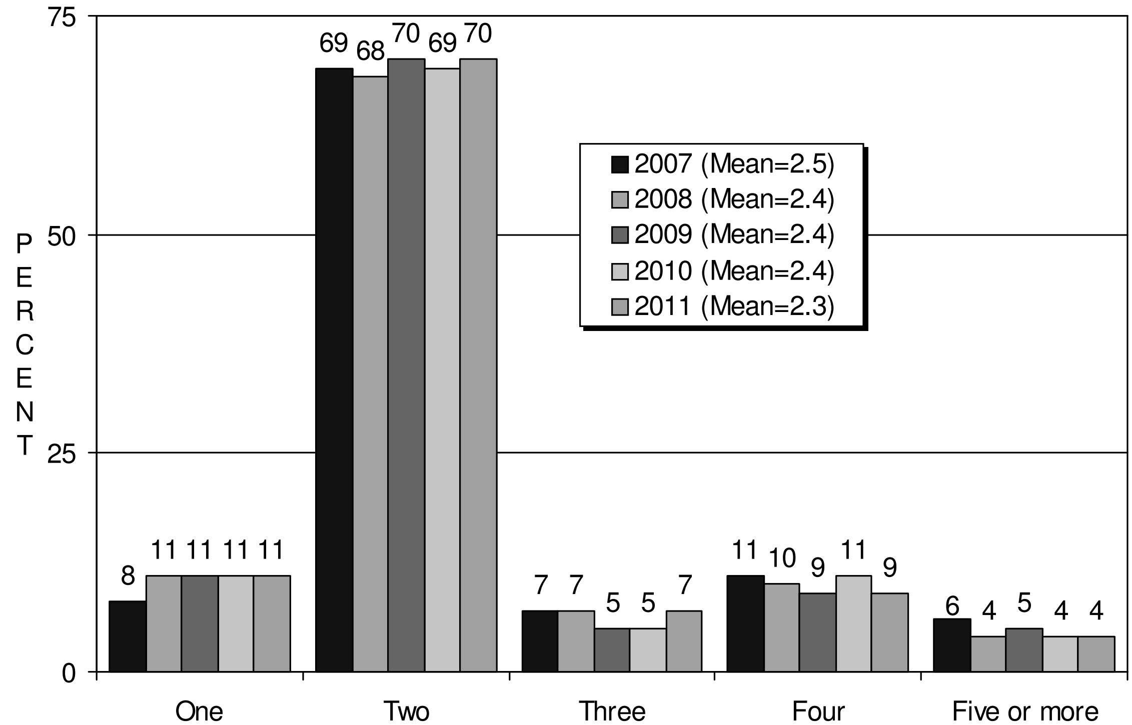
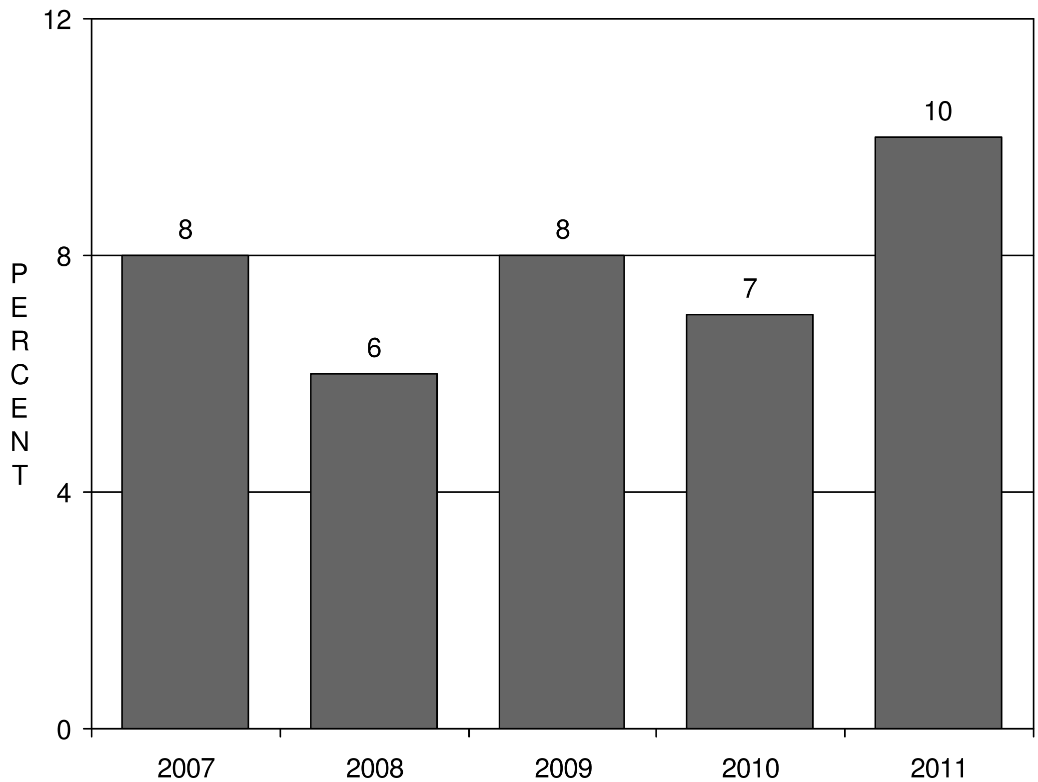


FIGURE 31
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 31). One in ten (10%) said they did, up significantly from 8% each in 2007 and 2009, 6% in 2008, and 7% last year.

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

FIGURE 32
Nights Stayed

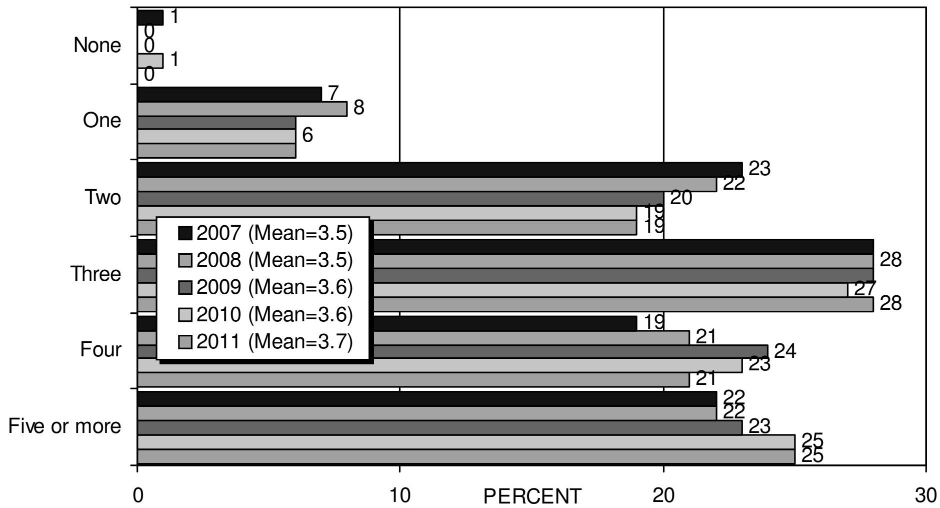
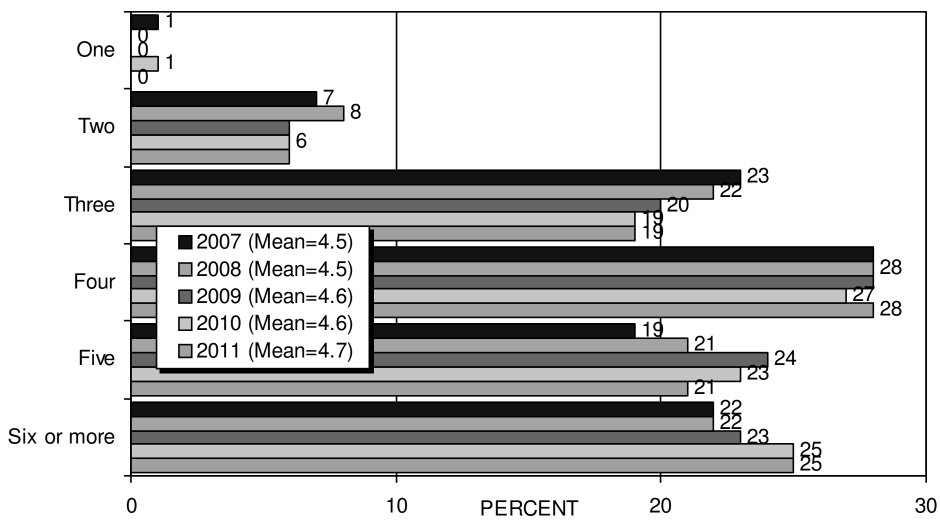
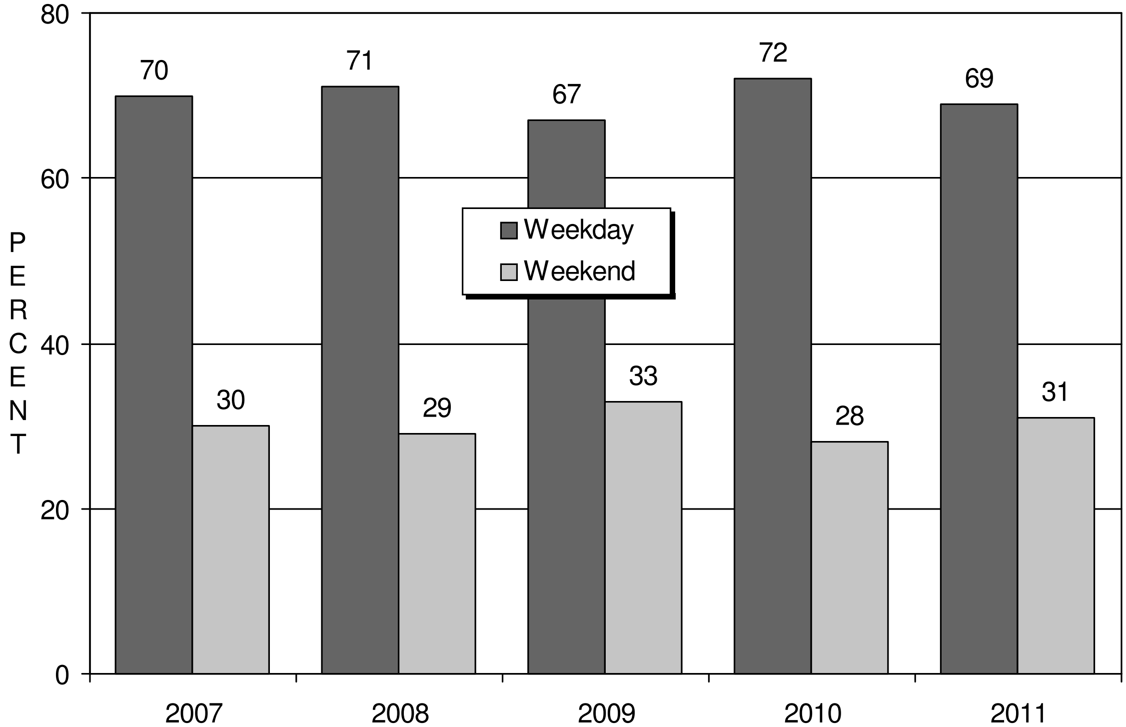


FIGURE 33
Days Stayed



In 2011, visitors stayed an average of 3.7 nights and 4.7 days in Las Vegas — up from the average of 3.5 nights and 4.5 days in 2007 and 2008, and 3.6 nights and 4.6 days in 2009 and 2010 (Figures 32 and 33).

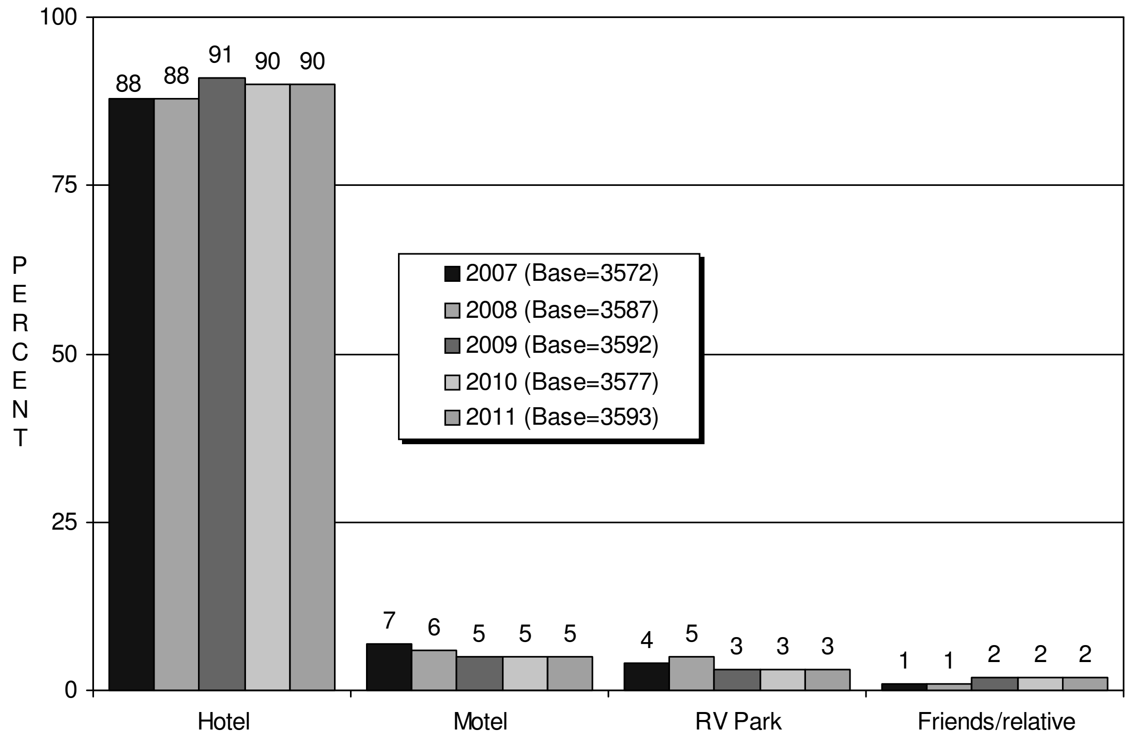
FIGURE 34
Weekend Versus Weekday Arrival*



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% last year) (Figure 34).

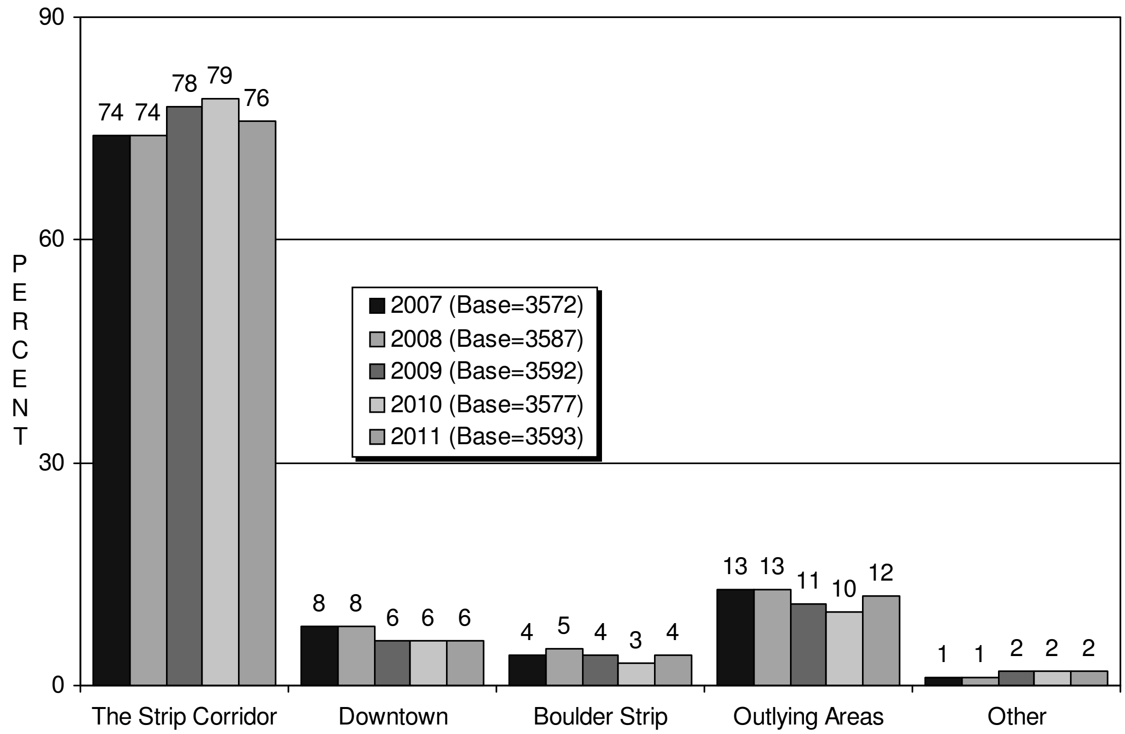
* *Weekday* is defined as Sunday through Thursday. *Weekend* is defined as Friday and Saturday.

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



Among visitors who stayed in Las Vegas overnight, 90% stayed in a hotel (up from 88% each in 2007 and 2008), while 5% stayed in a motel (down from 7% in 2007). Three percent (3%) stayed in an RV park (down from 4% in 2007 and 5% in 2008), and 2% stayed with friends or relatives (up from 1% each in 2007 and 2008) (Figure 35).

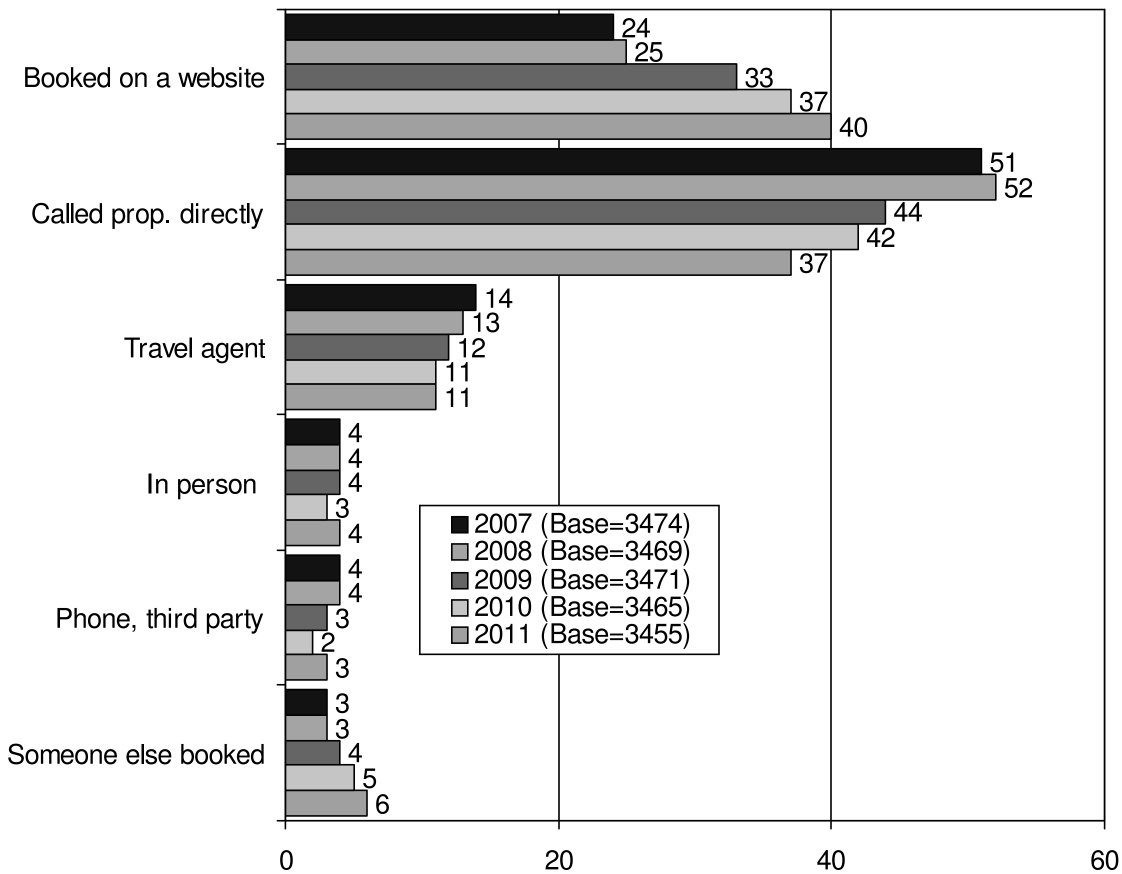
FIGURE 36
Location Of Lodging
(Among Those Who Stayed Overnight)



In terms of lodging location (among those who stayed overnight), 76% stayed in a property on the Strip Corridor* (down from 78% in 2009 and 79% last year), 6% stayed Downtown (down from 8% each in 2007 and 2008), and 4% stayed on the Boulder Strip (down from 5% in 2008). Twelve percent (12%) stayed in outlying parts of Las Vegas (a significant increase from 10% in 2010), and 2% stayed in other areas (Figure 36).

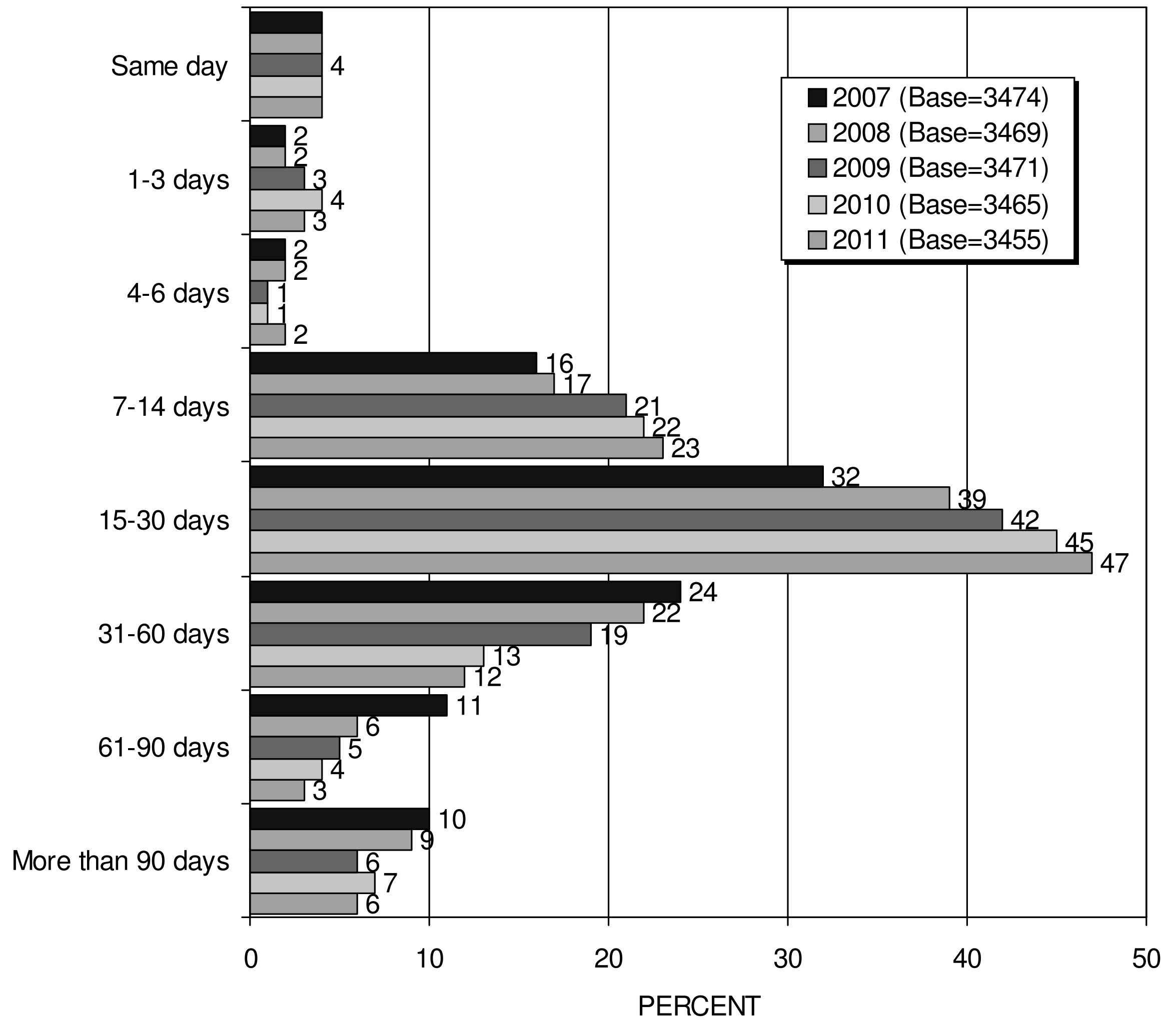
* The Strip Corridor includes properties located directly on Las Vegas Boulevard South, as well as properties near the Strip, between Valley View Road and Paradise Road.

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



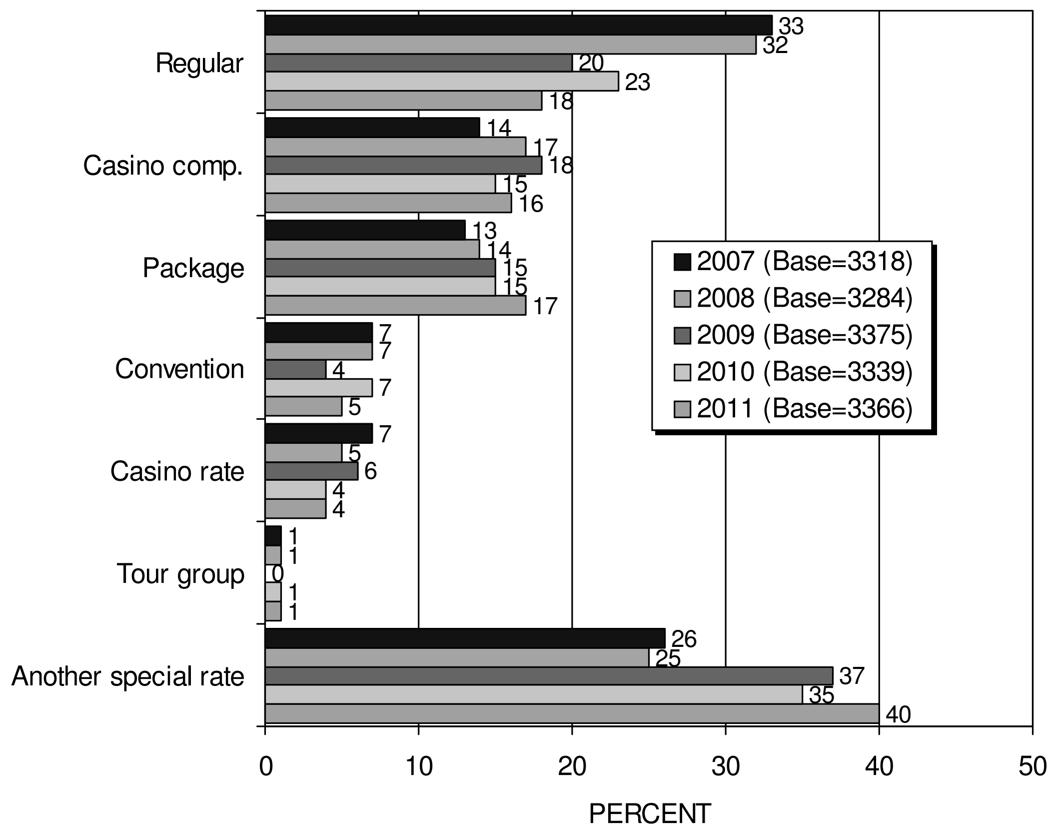
Visitors who stayed at a hotel, motel, or RV park were asked how they booked their accommodations in Las Vegas (Figure 37). In 2011, 40% said they used a website (up significantly from 24% in 2007, 25% in 2008, 33% in 2009, and 37% in 2010). Thirty-seven percent (37%) said they called the hotel, motel, or RV park directly (down significantly from 51% in 2007, 52% in 2008, 44% in 2009, and 42% last year). Eleven percent (11%) said they booked through a travel agent (the same as last year but down from 14% in 2007). Four percent (4%) said they booked in person and 3% (down from 4% each in 2007 and 2008) booked by phone through a third party (but not a travel agent).

FIGURE 38
Advance Booking Of Accommodations
(Among Those Who Stayed In A Hotel/Motel/RV Park)



We asked those staying in a hotel, motel, or RV park how far in advance they had booked accommodations (Figure 38). About one in five (21%) visitors booked more than a month in advance, down significantly from 45% in 2007, 37% in 2008, 30% in 2009, and 24% in 2010. By contrast, seven in ten (70%) visitors booked one week to one month in advance, up significantly from 48% in 2007, 56% in 2008, 63% in 2009, and 67% last year. Nine percent (9%) of visitors reported making their reservations less than one week before arrival, the same as last year, but up from 8% each in 2007, 2008, and 2009.

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



Visitors staying in a hotel or motel were shown a card describing various room rates* and were asked which type of room rate they had received (Figure 39). Eighteen percent (18%) of these visitors said they paid a regular room rate, significantly lower than 33% in 2007, 32% in 2008, and 23% in 2010. Sixteen percent (16%) received a casino complimentary rate (down from 18% in 2009), while 4% paid a casino rate (down from 7% in 2007, 5% in 2008, and 6% in 2009). Seventeen percent (17%) of visitors paid a package rate (up from 13% in 2007 and 14% in 2008), while 1% received a tour group rate (up from less than 1% in 2009). Five percent (5%) paid a convention rate (down from 7% each in 2007, 2008, and last year). The remaining 40% paid some other kind of special rate, up from 26% in 2007, 25% in 2008, 37% in 2009, and 35% last year.

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

FIGURE 40
Room Rate By Booking Method
(2011)

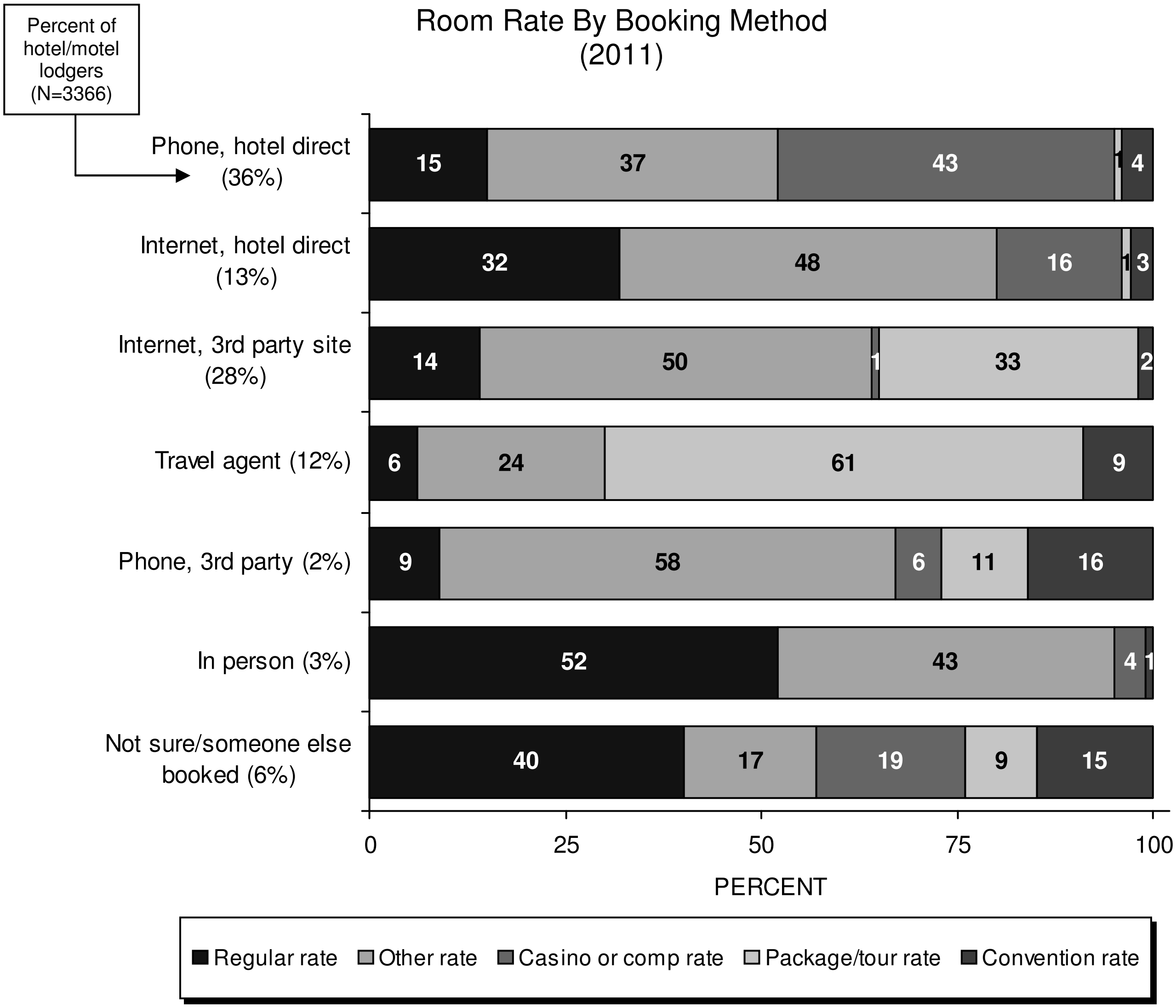
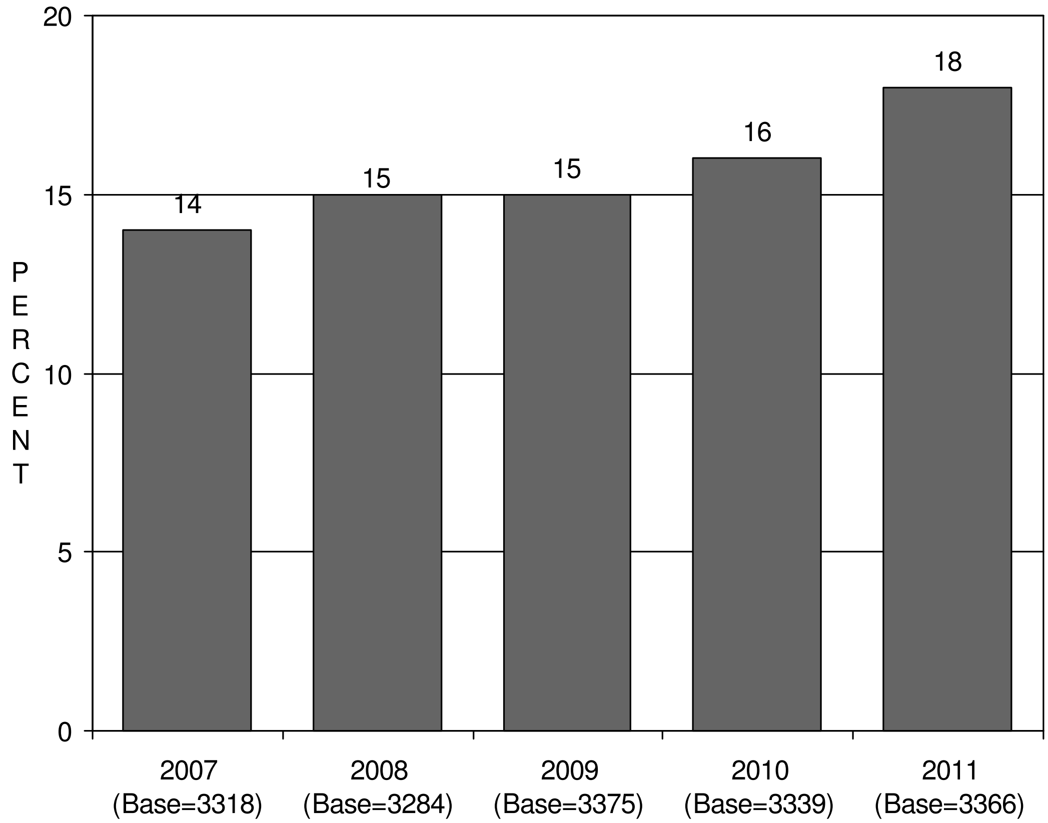


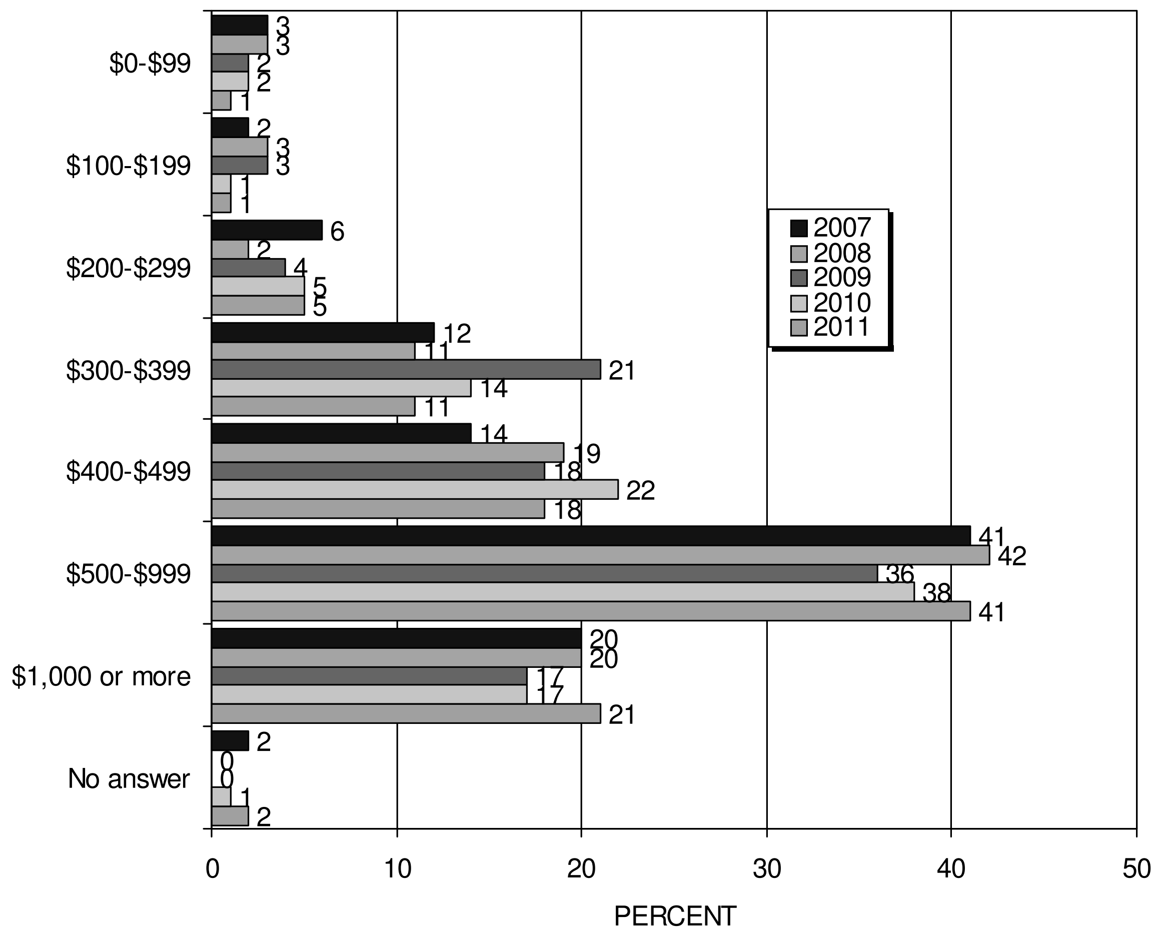
Figure 40 shows the room rate category by the booking method for 2011 among those staying in a hotel or motel. Of those who called the hotel directly, 43% received a casino or casino complimentary rate, while 38% received a special rate, and 15% received a regular rate. Of those who booked their room on the Internet through a third-party site, 50% received a special room rate, 33% received a package rate, and 14% received a regular rate. Over six in ten (61%) of those who booked through a travel agent received a package rate, while nearly one-quarter (24%) received a special rate. Among those who booked directly on a hotel website, 33% received a regular room rate and 48% received a special rate. Among those who booked in person, over one-half (52%) received a regular rate. Among those who booked through a third party by phone, 58% received a special rate, while 16% received a convention rate.

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



Eighteen percent (18%) of visitors purchased a package deal or were part of a tour group, up from 14% in 2007 and 15% each in 2008 and 2009 (Figure 41).

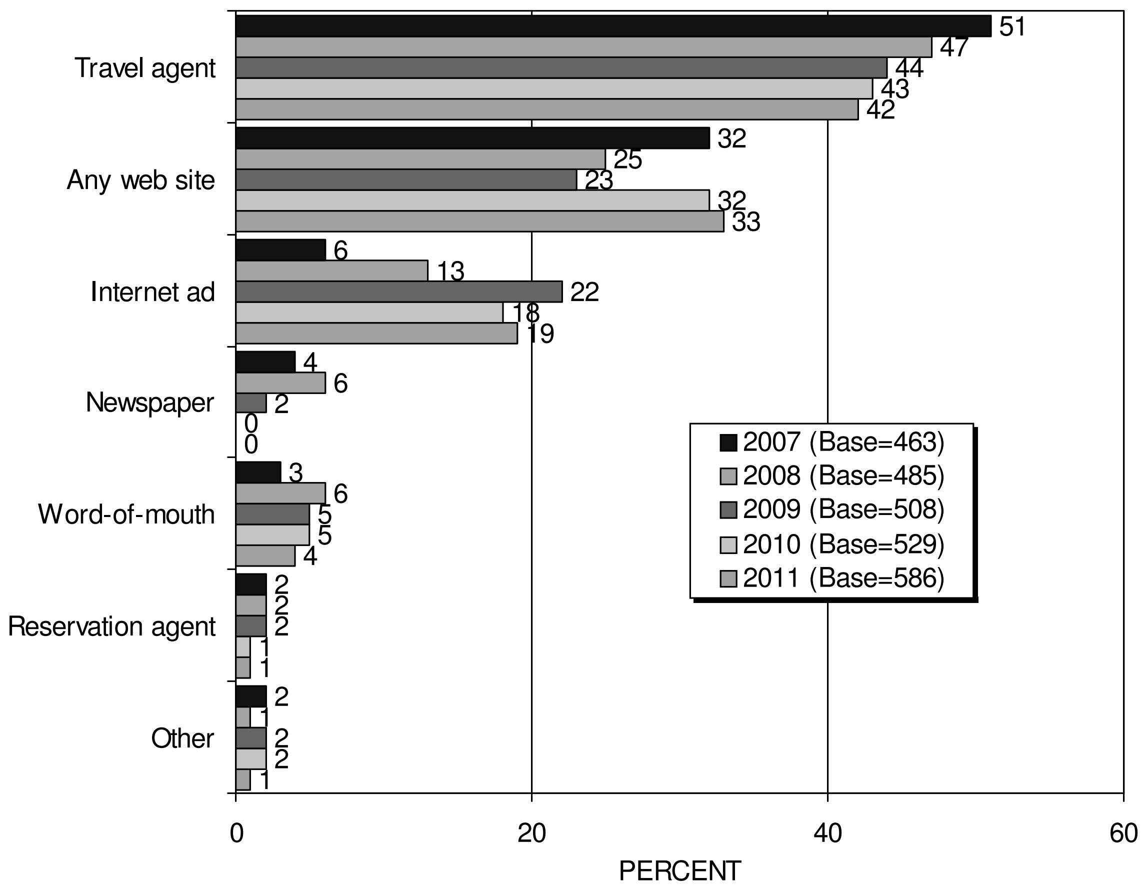
FIGURE 42
Cost Of Package Per Person
(Among Those Who Bought A Package)



Means: 2007=$709.90; 2008=$746.69; 2009=$640.29; 2010=$651.02; 2011=$757.83
Base Sizes: 2007=463; 2008=485; 2009=508; 2010=529; 2011=586

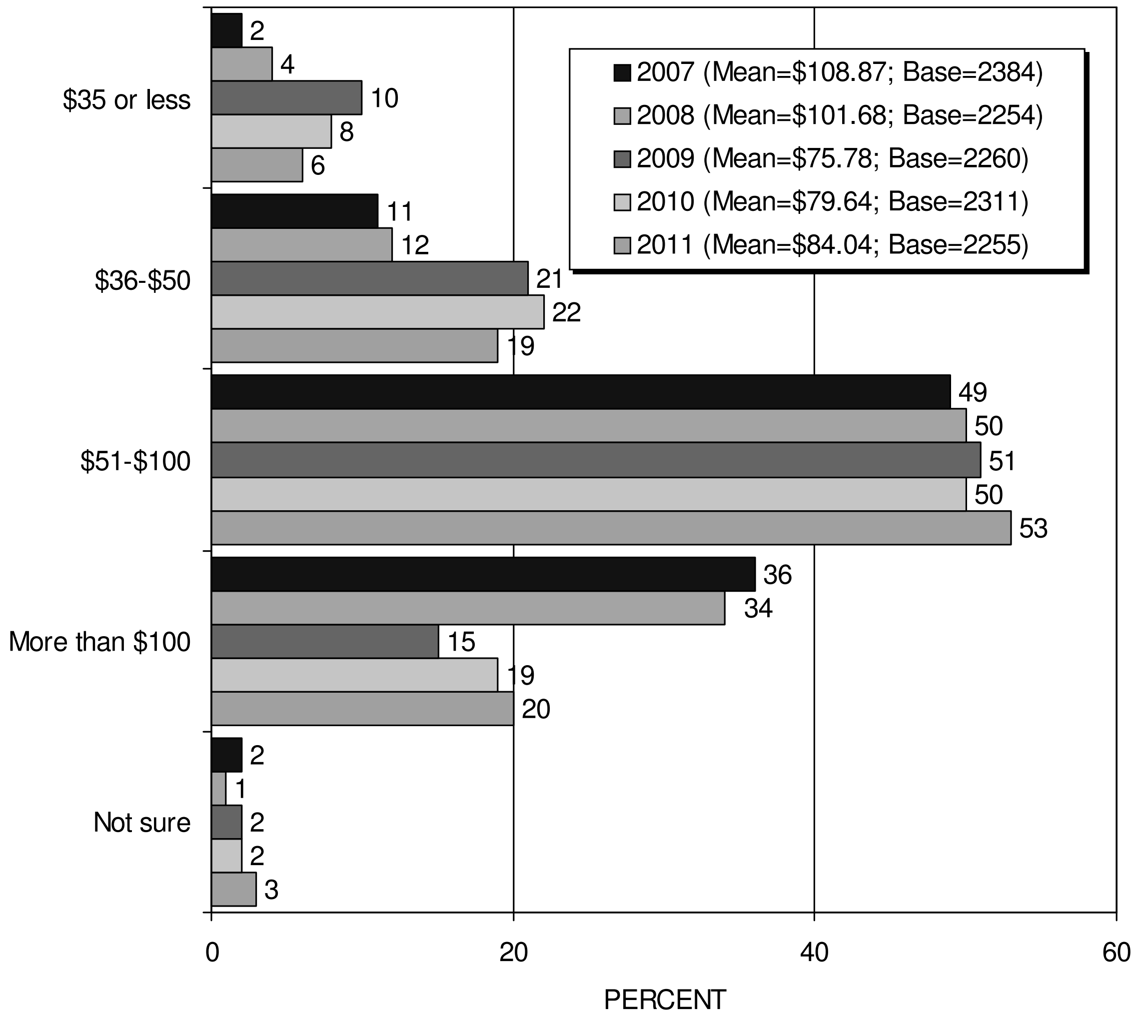
We asked those who had purchased a hotel, airline, or a tour/travel group package how much their packages cost per person (Figure 42). The average cost of such a package in 2011 was $757.83, up significantly from $640.29 in 2009 and $651.02 in 2010.

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



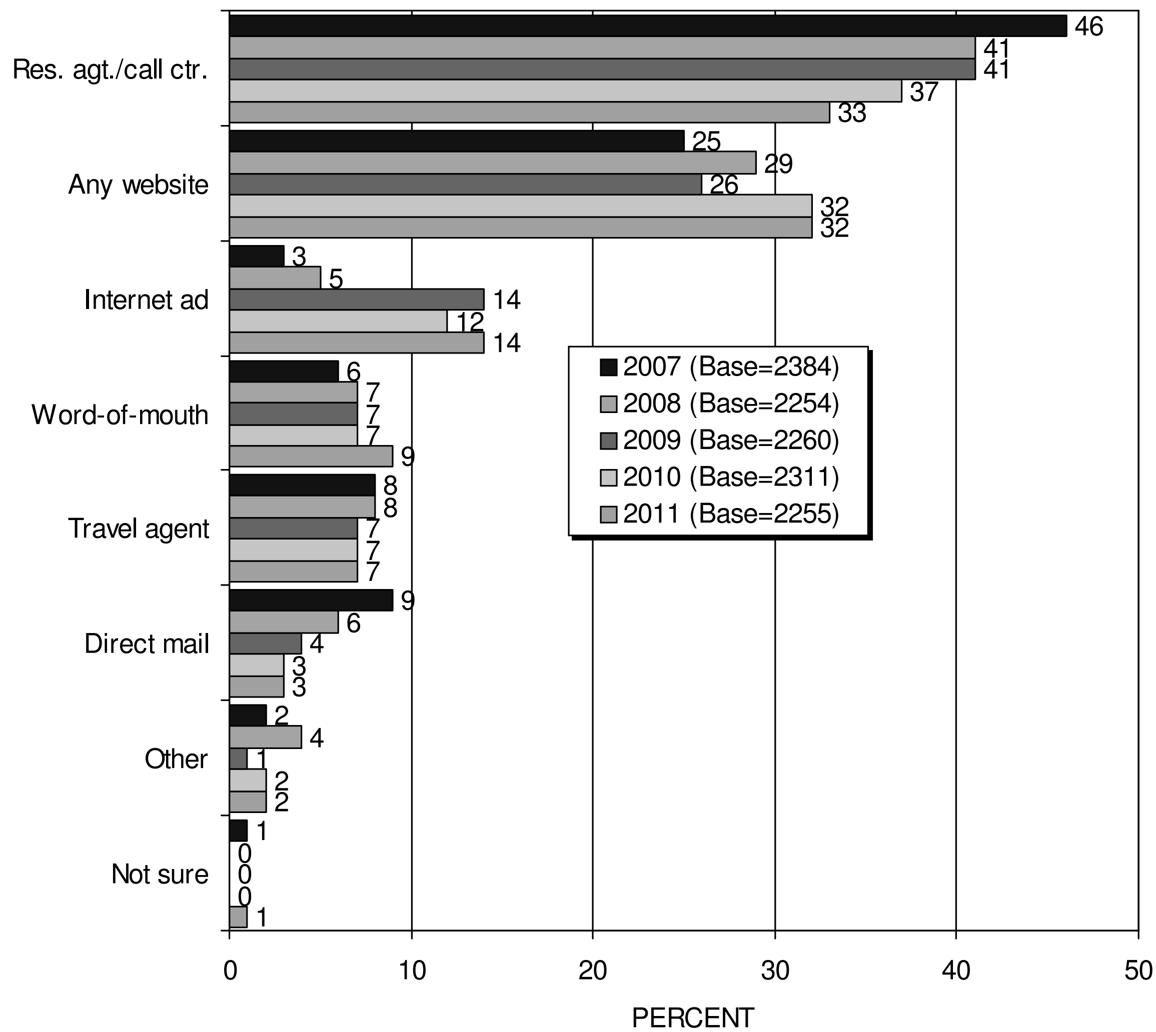
Package purchasers were asked where they first heard about the package they bought (Figure 43). Forty-two percent (42%) said from a travel agent, down from 51% in 2007. One-third (33%) mentioned a website (up from 25% in 2008 and 23% in 2009), while 19% said an Internet ad (up from 6% in 2007 and 13% in 2008). Four percent (4%) said through word of mouth and 1% said from a reservation agent (down from 2% each from 2007 — 2009).

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



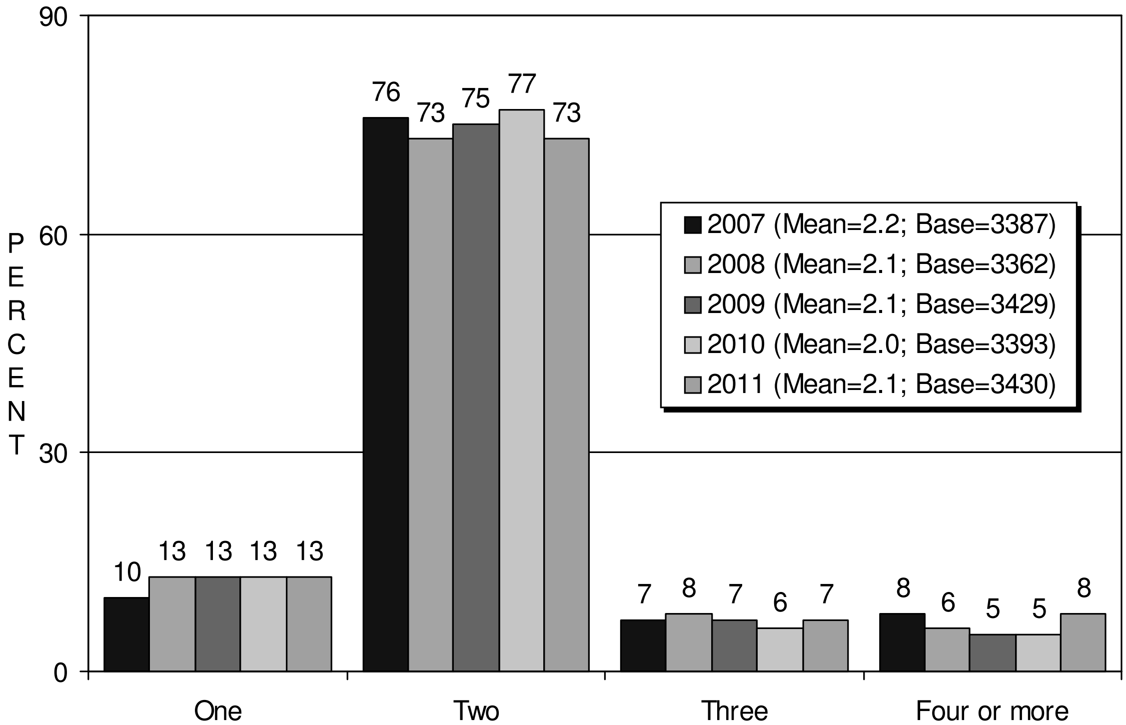
We looked at lodging expenditures among those who did *not* purchase travel packages (Figure 44). Over one-half (53%) of these non-package visitors paid between $51 and $100 per night for their room, up from 49% in 2007. Nineteen percent (19%) paid between $36 and $50 per night, up from 11% in 2007 and 12% in 2008. One in five (20%) paid more than $100 per night, up from 15% in 2009 but down significantly from 36% in 2007 and 34% in 2008. The average daily room rate for non-package visitors in 2011 was $84.04, up significantly from $75.78 in 2009 and $79.64 last year, but still down significantly from $108.87 in 2007 and $101.68 in 2008.

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



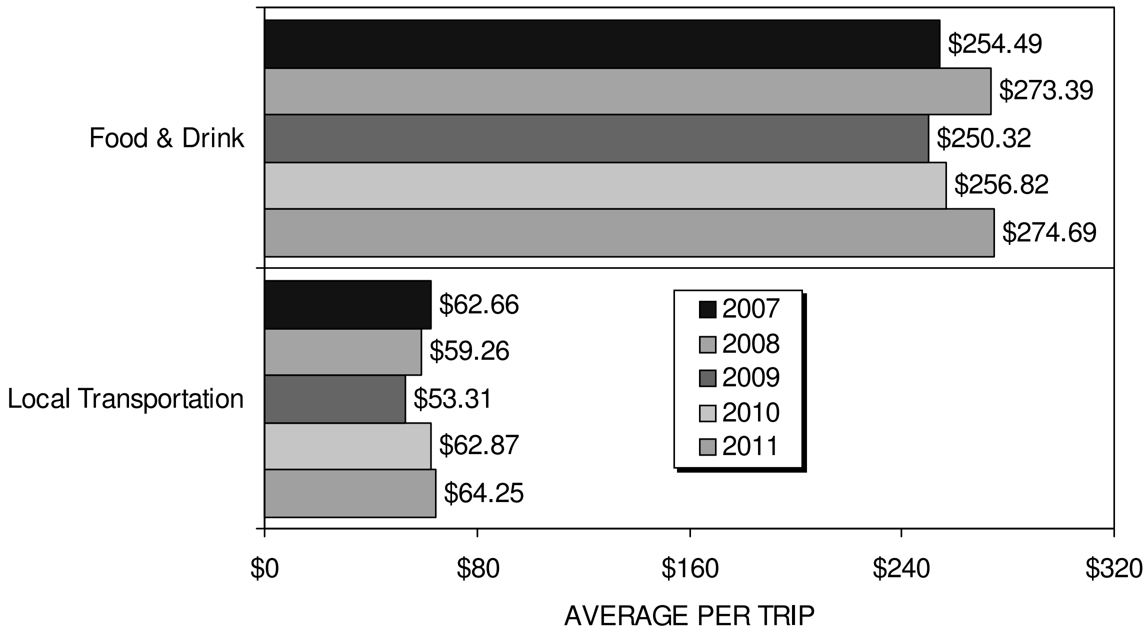
Visitors were asked how they first found out about the room rate they paid (Figure 45). One-third (33%) said it was through a reservation agent or call center, down significantly from 46% in 2007, 41% each in 2008 and 2009, and 37% in 2010. Thirty-two percent (32%) mentioned a website, up from 25% in 2007 and 26% in 2009. Fourteen percent (14%) mentioned an Internet ad (up from 3% in 2007 and 5% in 2008), while 9% mentioned word-of-mouth (up from 6% in 2007 and 7% each from 2008 – 2010), 7% mentioned a travel agent, and 3% mentioned direct mail (down from 9% in 2007 and 6% in 2008).

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



As in past years, the majority (73%, down significantly from 76% in 2007, 75% in 2009, and 77% last year) of visitors who stayed in a hotel or motel said two people stayed in their room (Figure 46). Thirteen percent (13%) said they were lodging alone (up from 10% in 2007), 7% said three people stayed in their room, while 8% said four or more people stayed in their room (up significantly from 6% in 2008 and 5% each in 2009 and 2010). The mean (average) number of room occupants (2.1) was up significantly from 2.0 in 2010 but down from 2.2 in 2007

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.

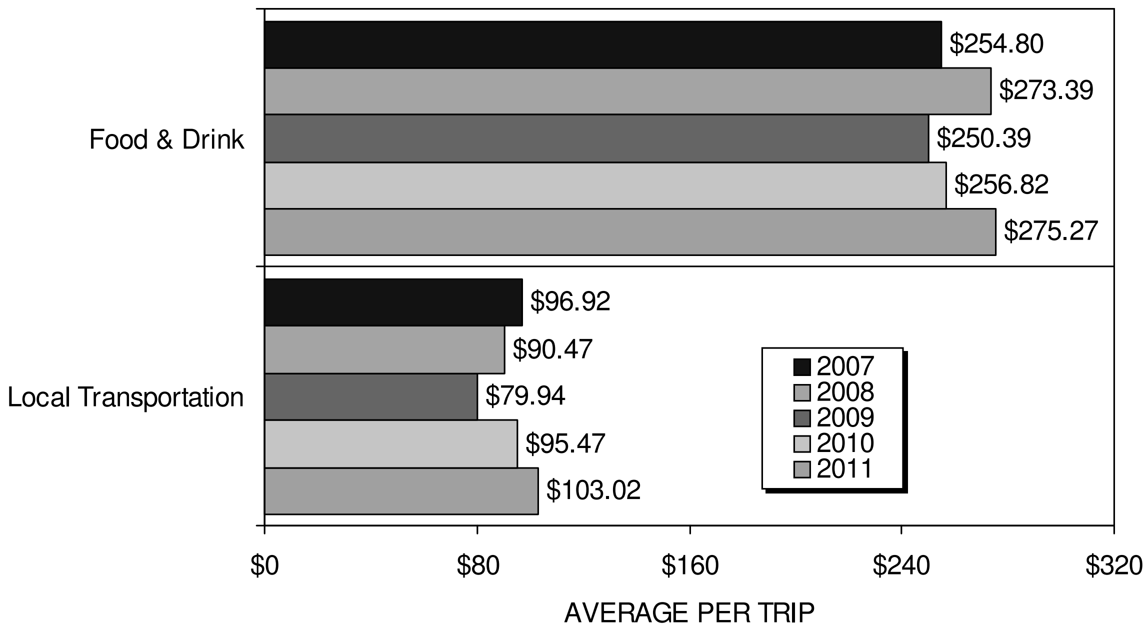
Figure 47 shows the average *trip* expenditures on food and drink and on local transportation *including visitors who said they spent nothing in that category*. The average expenditure on food and drink in 2011 was $274.69, up significantly from $254.49 in 2007, $250.32 in 2009, and $256.82 last year.

The average transportation expenditure for 2011 was $64.25, up significantly from $59.26 in 2008 and $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 2011 was $275.27, up significantly from $254.80 in 2007, $250.39 in 2009, and $256.82 last year (Figure 48). The average trip expenditure on local transportation for 2011 was $103.02, up significantly from prior readings.

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

	2007	2008	2009	2010	2011
Food and Drink					
Base size	(3590)	(3601)	(3598)	(3601)	(3592)
Proportion of total	99.7%	100.0%	100.0%	100.0%	99.8%
Local Transportation					
Base size	(2323)	(2358)	(2400)	(2372)	(2246)
Proportion of total	65%	65%	67%	66%	62%

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

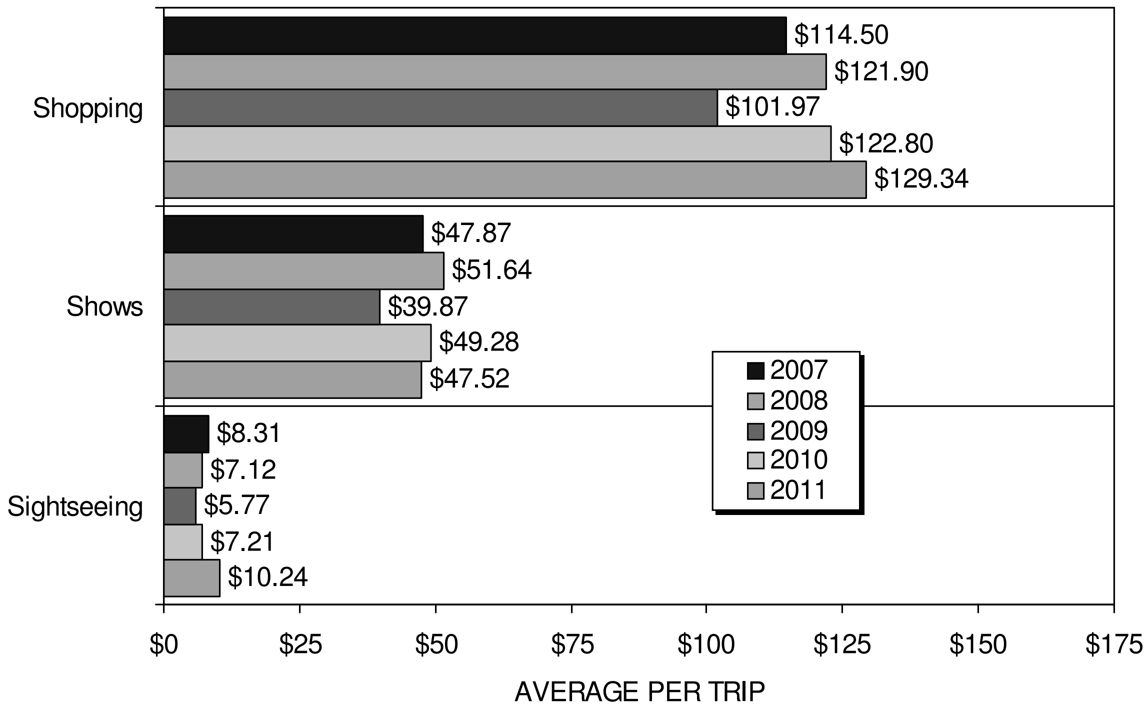
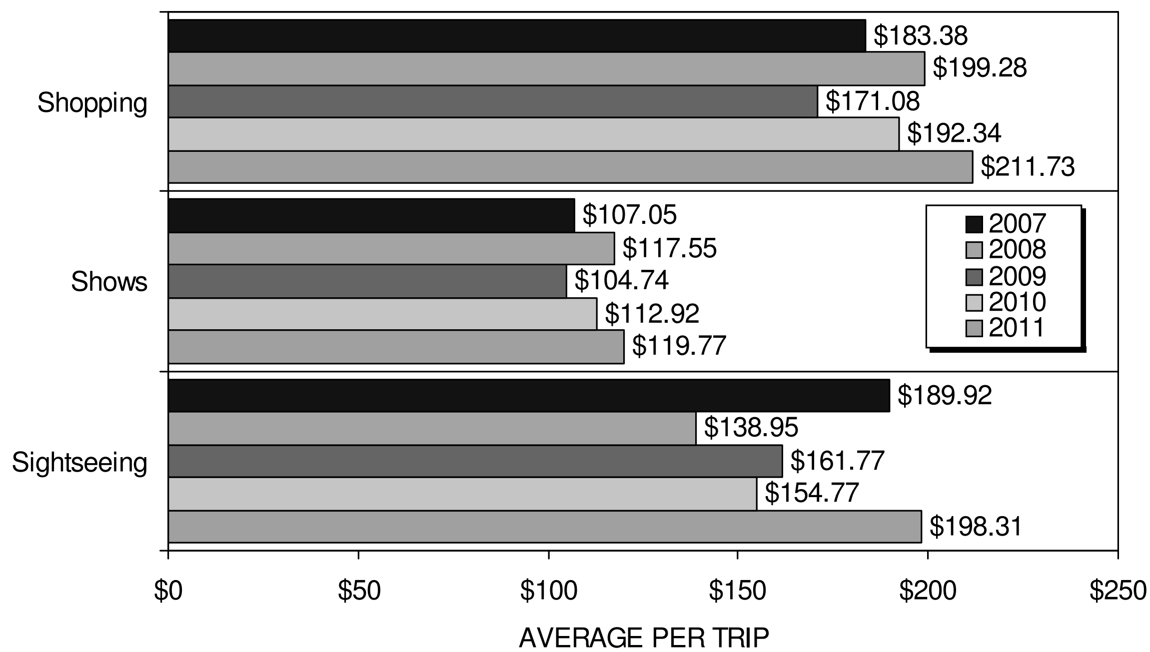


Figure 49 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas — *including visitors who said they spent nothing* in these categories. The average trip expenditure on shopping was $129.34, up significantly from $114.50 in 2007 and $101.97 in 2009. The average expenditure on shows was $47.52, up from $39.87 in 2009. The average expenditure on sightseeing was $10.24, up from $7.12 in 2008, $5.77 in 2009, and $7.21 last year.

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 $211.73, up significantly from $183.38 in 2007, $171.08 in 2009, and $192.34 last year (Figure 50). The average trip total spent on shows was $119.77, up from $107.05 in 2007, $104.74 in 2009, and $112.92 last year. The sightseeing total was $198.31, up from 2008 – 2010 results.

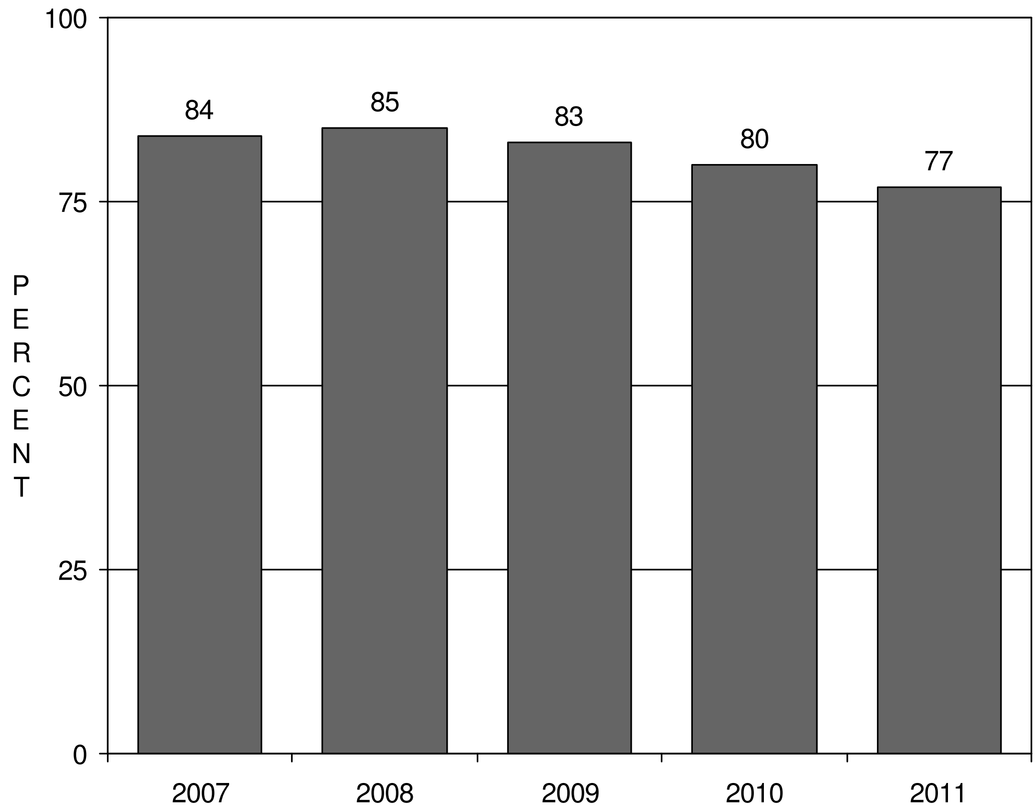
† Percentages of respondents who spent money in each category are shown in the following table:

	2007	2008	2009	2010	2011
Shopping					
Base size	(2245)	(2203)	(2145)	(2302)	(2201)
Proportion of total	62%	61%	60%	64%	61%
Shows					
Base size	(1607)	(1582)	(1370)	(1573)	(1429)
Proportion of total	45%	44%	38%	44%	40%
Sightseeing					
Base size	(157)	(185)	(128)	(168)	(186)
Proportion of total	4%	5%	4%	5%	5%

GAMING BEHAVIOR AND BUDGETS

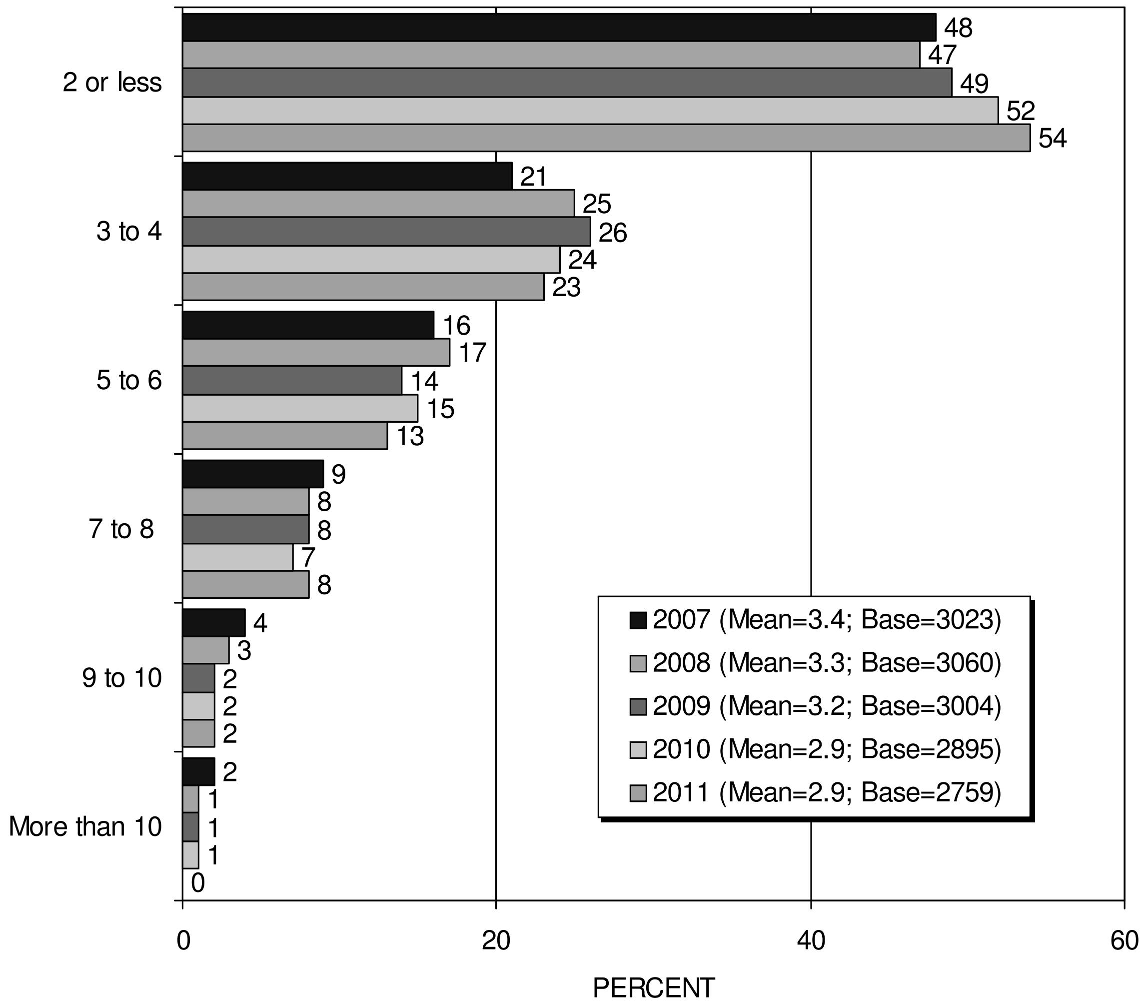
Seventy-seven percent (77%) of all visitors said they gambled while in Las Vegas, down significantly from 84% in 2007, 85% in 2008, 83% in 2009, and 80% in 2010 (Figure 51).

FIGURE 51
Whether Gambled While In Las Vegas*



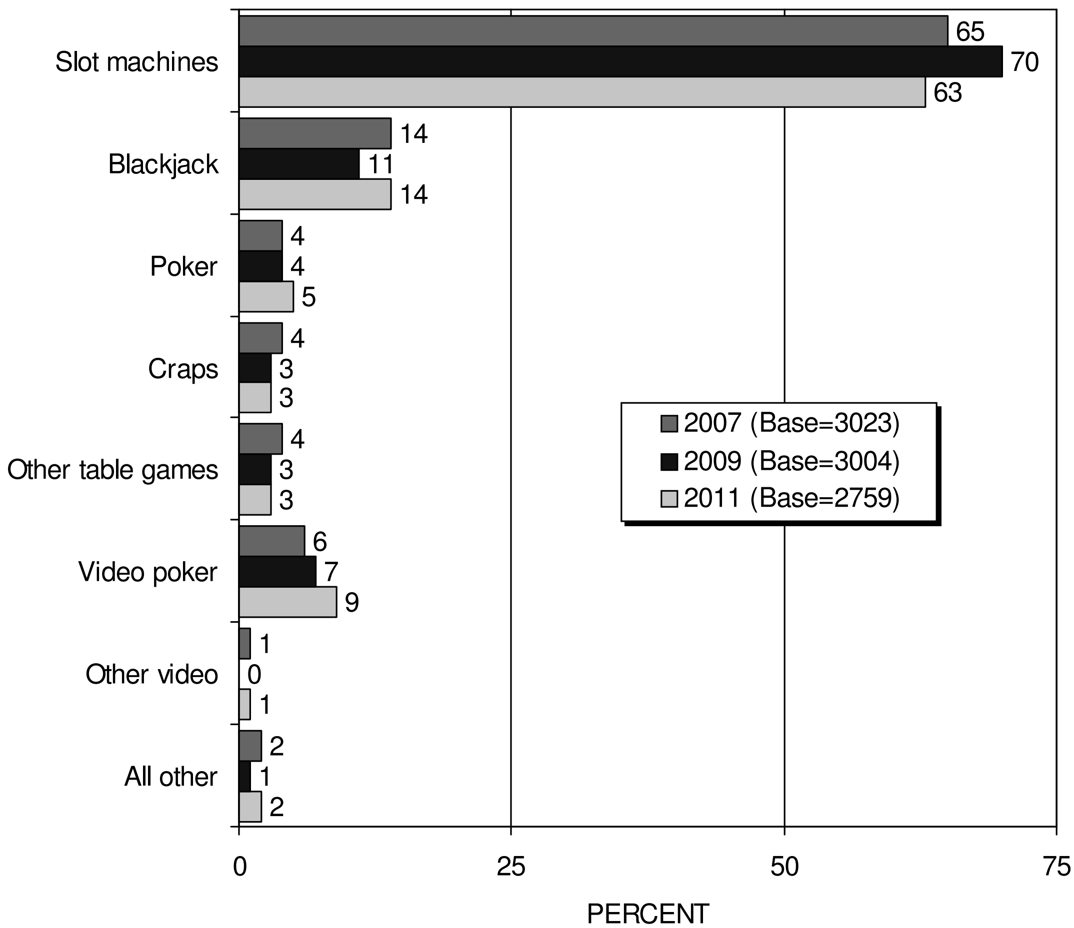
* Only "yes" responses are reported in this chart.

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



Among those who gambled while in Las Vegas, over one-half (54%) gambled for two hours or less, up significantly from 48% in 2007, 47% in 2008, and 49% in 2009 (Figure 52). The average amount of time spent gambling per day was 2.9 hours, the same as last year, but down significantly from 3.4 hours in 2007, 3.3 hours in 2008, and 3.2 hours in 2009.

FIGURE 53
Casino Game Played Most Often*
(Among Those Who Gambled — Asked Every Other Year)



Those who gambled on their current trip to Las Vegas were asked which casino game they played the most often. Slots remains the most popular game, mentioned by 63% of gamblers, down significantly from 70% in 2009. Fourteen percent (14%) said they played blackjack the most often (up significantly from 11% in 2009), followed by video poker (9%, up from 6% in 2007 and 7% in 2009), poker (5%), and craps (3%) (Figure 53).

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

FIGURE 54
Number Of Casinos Visited*

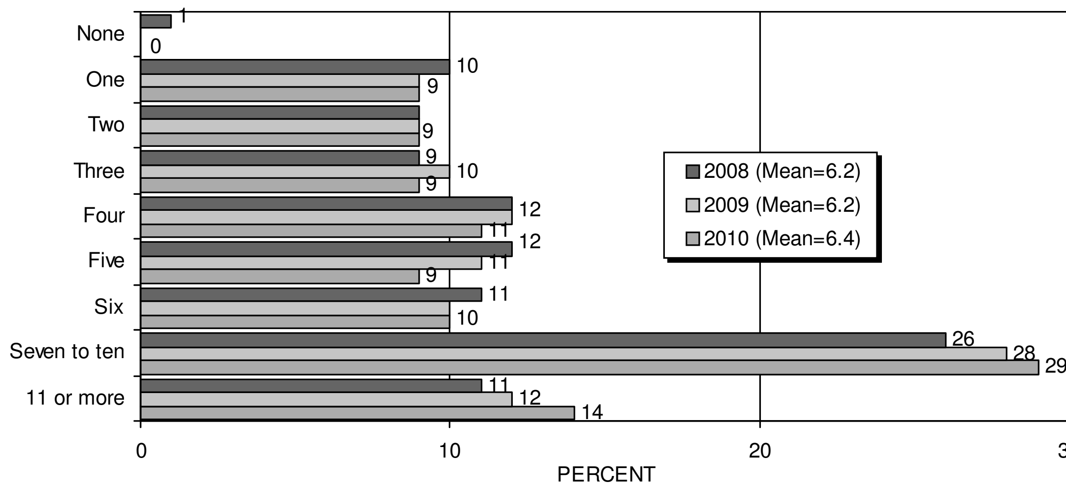
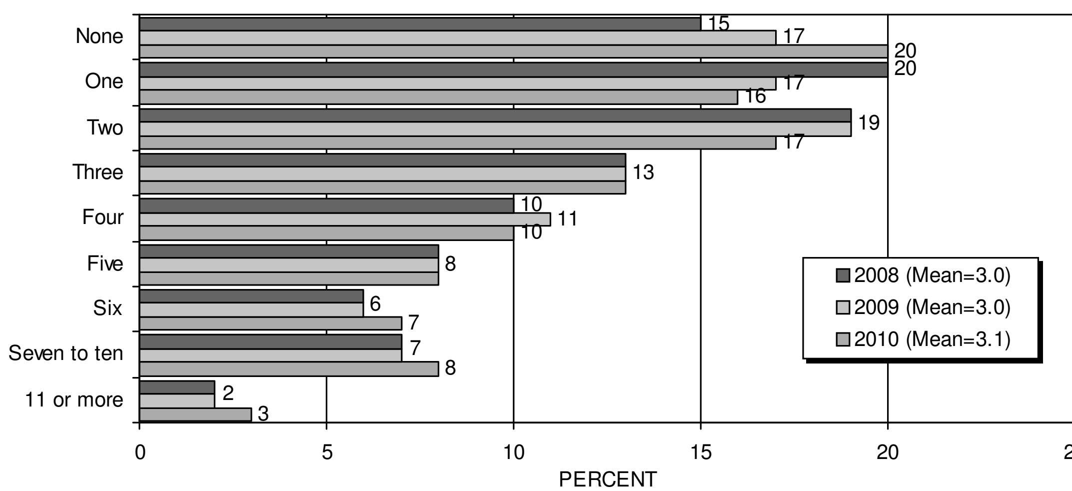


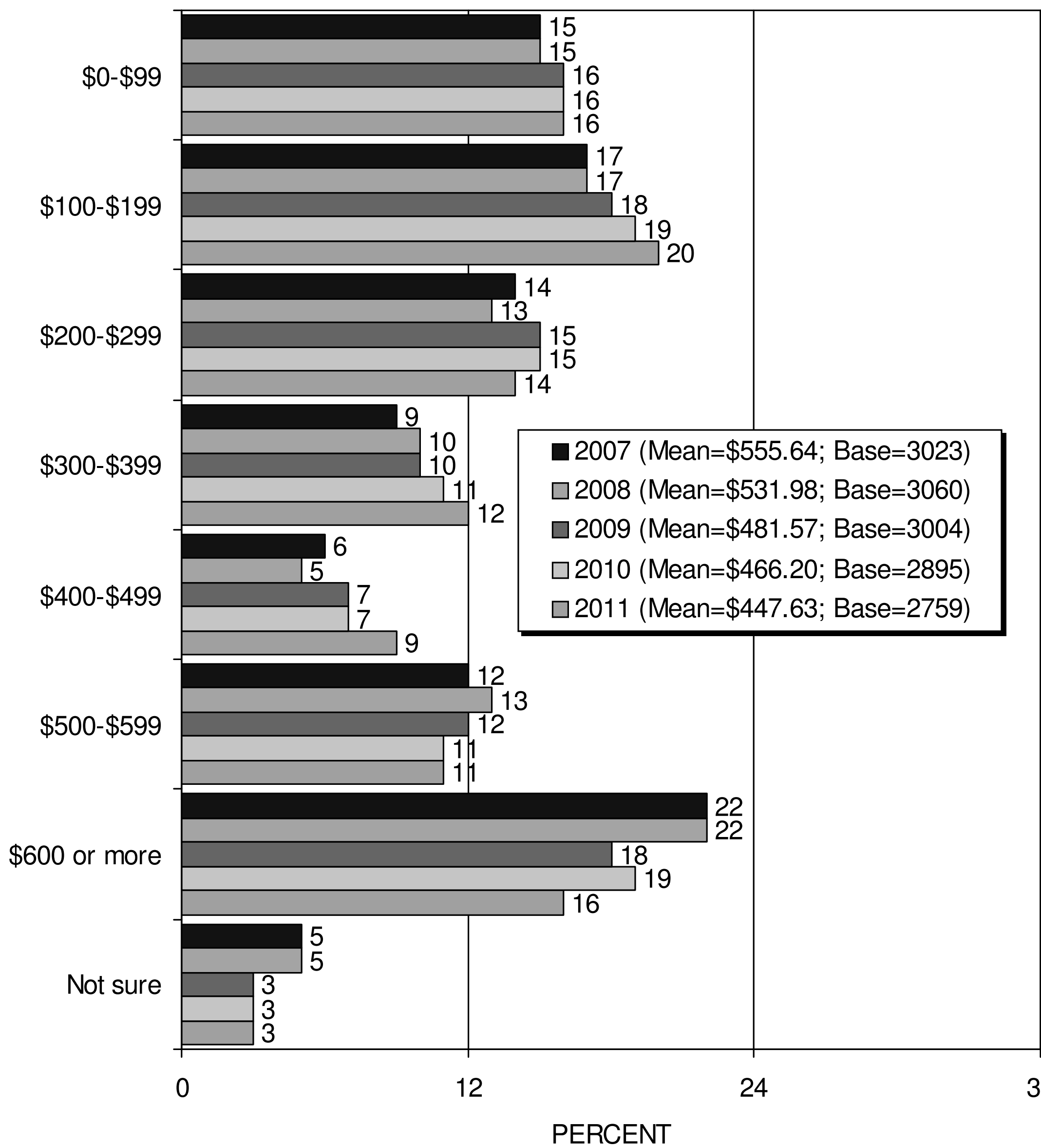
FIGURE 55
Number Of Casinos Where Gambled*



All visitors to Las Vegas were asked how many casinos they had visited, and in how many of those casinos they had gambled. The average number of casinos visited in 2010 was 6.4 (up significantly from 6.2 in prior years), and the number of casinos at which visitors gambled was 3.1 (Figures 54 and 55).

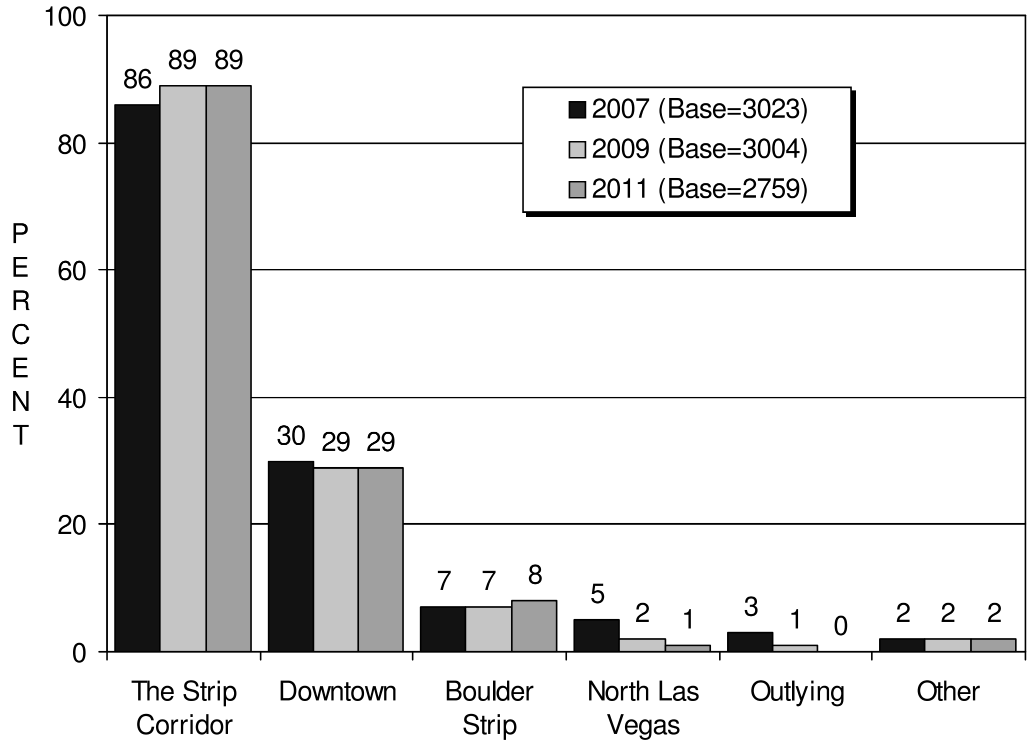
* These questions are asked every other year and were not asked in 2007 or 2011. However, they were included in 2009.

FIGURE 56
Trip Gambling Budget
(Among Those Who Gambled)



Among those who gambled in 2011, the average gambling budget was $447.63, not significantly different from 2009 or last year, but down from $555.64 in 2007 and $531.98 in 2008 (Figure 56). Sixteen percent (16%) of gamblers said they budgeted $600 or more for gambling, down significantly from 22% each in 2007 and 2008, and 19% in 2010.

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



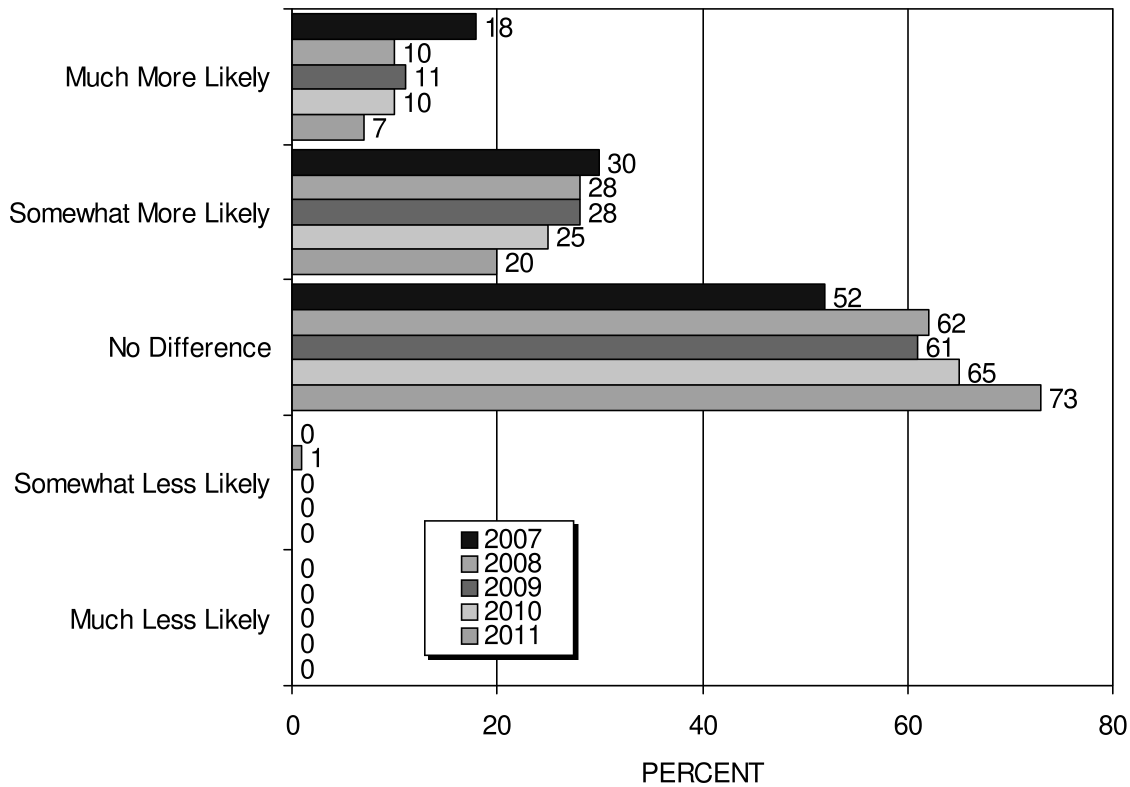
Most visitors (89%, up from 86% in 2007) gambled on the Strip Corridor† (Figure 57). Twenty-nine percent (29%) said they gambled Downtown, 8% gambled in the Boulder Strip area, 1% in North Las Vegas (down from 5% in 2007 and 2% in 2009), and less than 1% in outlying areas (down from 3% in 2007).

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

Multiple responses to this question were permitted.

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

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



All visitors to Las Vegas were asked the following:

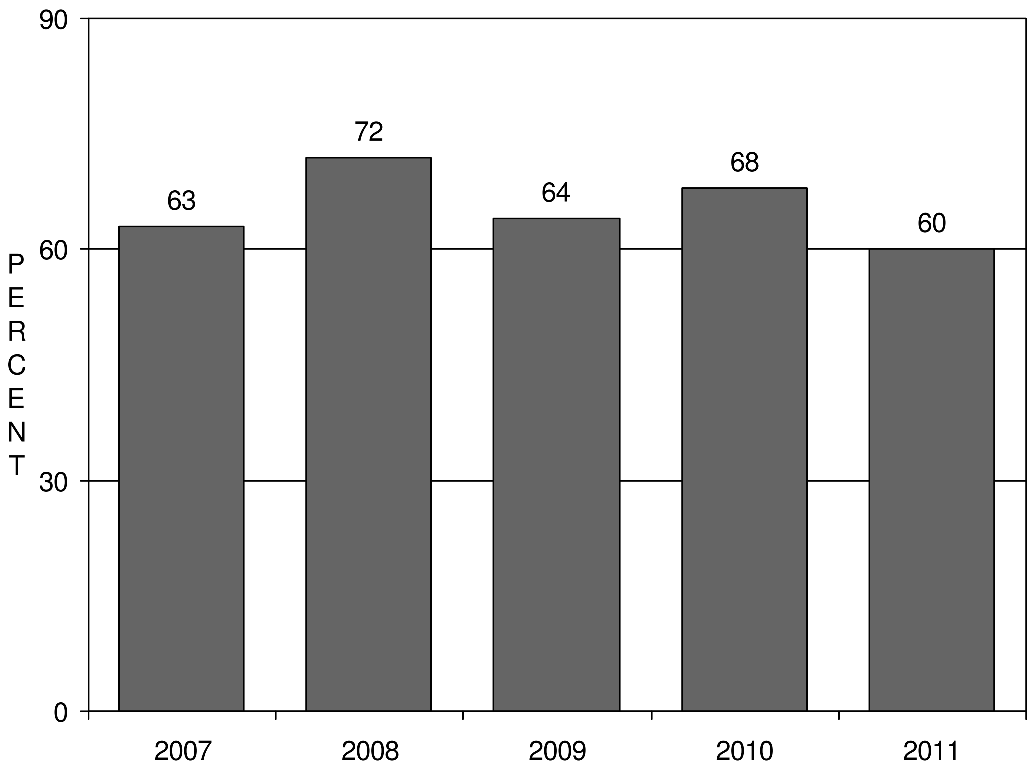
> "Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it not make a difference in your decision to visit Las Vegas?"

Twenty-seven percent (27%) said they were either somewhat or much *more* likely to visit Las Vegas, down significantly from 48% in 2007, 38% in 2008, 39% in 2009, and 35% last year. Seventy-three percent (73%) said that having other places to gamble made no difference in their decision to visit Las Vegas, up from 52% in 2007, 62% in 2008, 61% in 2009, and 65% in 2010 (Figure 58). Less than 1% said they were *less* likely to visit Las Vegas.

ENTERTAINMENT

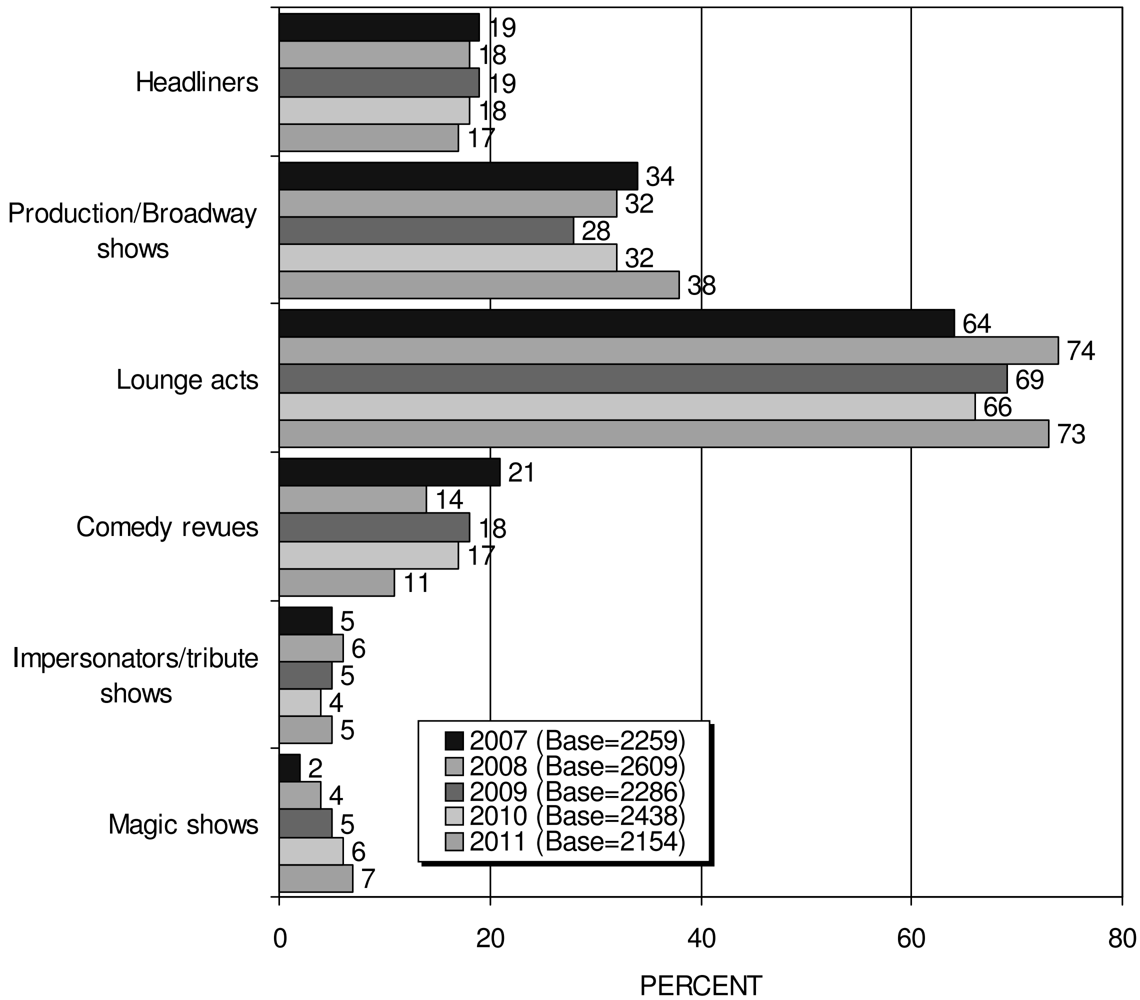
Sixty percent (60%) of visitors attended shows during their stay, down significantly from 63% in 2007, 72% in 2008, 64% in 2009, and 68% in 2010 (Figure 59).

FIGURE 59
Entertainment Attendance*



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

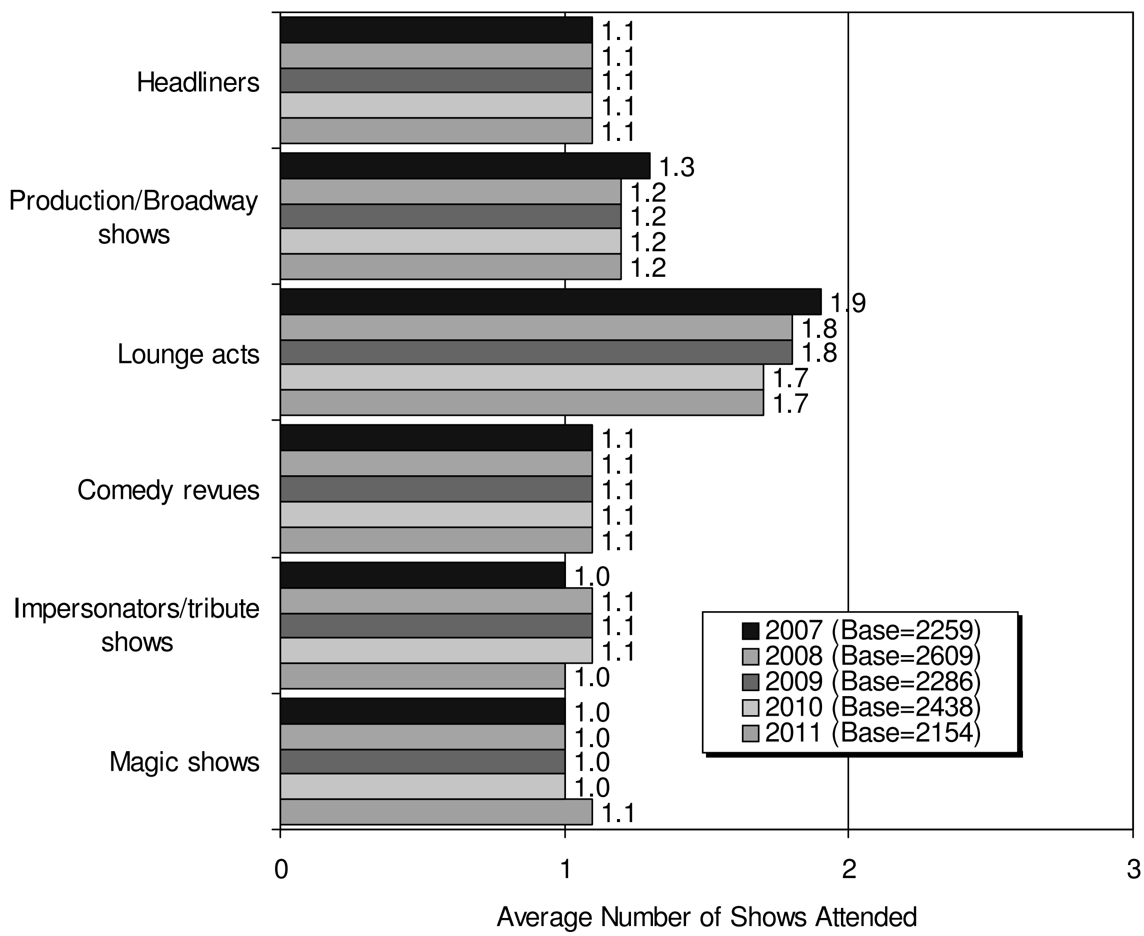
FIGURE 60
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



In 2011, 73% of visitors who saw a show in Las Vegas went to a lounge act, up significantly from 64% in 2007, 69% in 2009, and 66% in 2010 (Figure 60). Thirty-eight percent (38%) went to a production or Broadway-type show, up from prior years. Seventeen percent (17%) saw a headliner, 11% saw a comedy show (down from prior years), 7% saw a magic show (up from 2% in 2007, 4% in 2008, and 5% in 2009), and 5% saw an impersonator/tribute show.

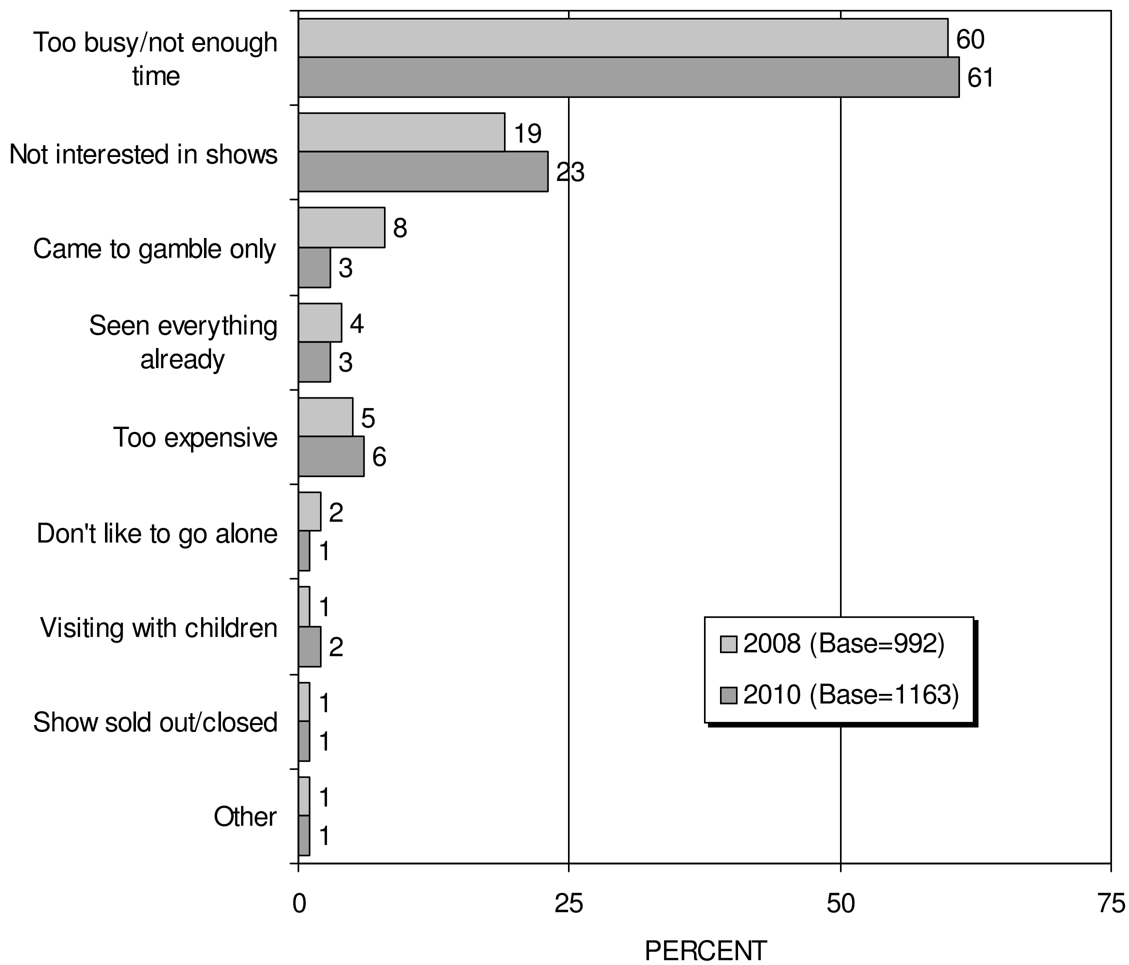
* Multiple responses were permitted.

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



Visitors who saw shows were asked how many shows of each type they saw (Figure 61). The average number of shows attended was highest for visitors who saw lounge acts (1.7, the same as last year but down significantly from 1.9 in 2007 and 1.8 each in 2008 and 2009). Visitors saw an average of 1.2 production and Broadway-type shows, 1.1 headliners, 1.1 comedy revues, 1.0 impersonators/tribute shows, and 1.1 magic shows.

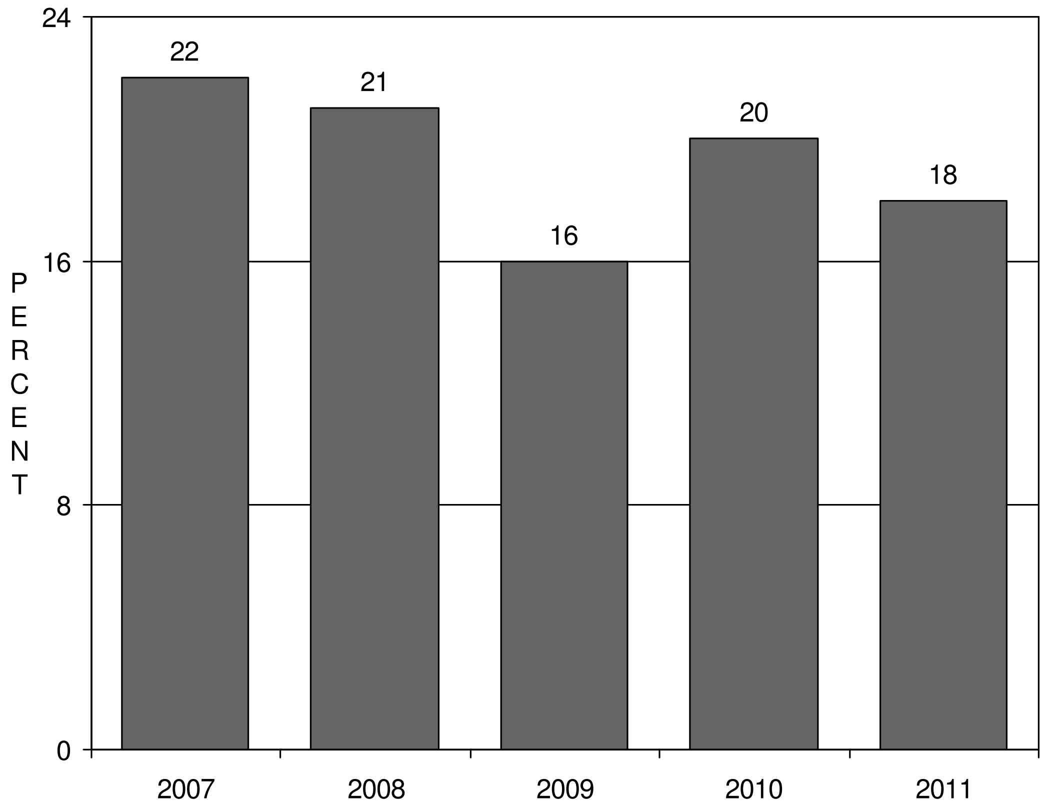
FIGURE 62
Main Reason For Not Attending Any Shows*
(Among Those Who Attended No Shows – Asked Every Other Year)



Visitors who did not attend any shows while in Las Vegas were asked why (Figure 62). Six in ten (61%) said it was because they were too busy. Twenty-three percent (23%) said they were not interested in shows, while 6% said the shows are too expensive, 3% said they came to Las Vegas only to gamble (down from 8% in 2008), and another 3% said they had already seen all the shows.

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

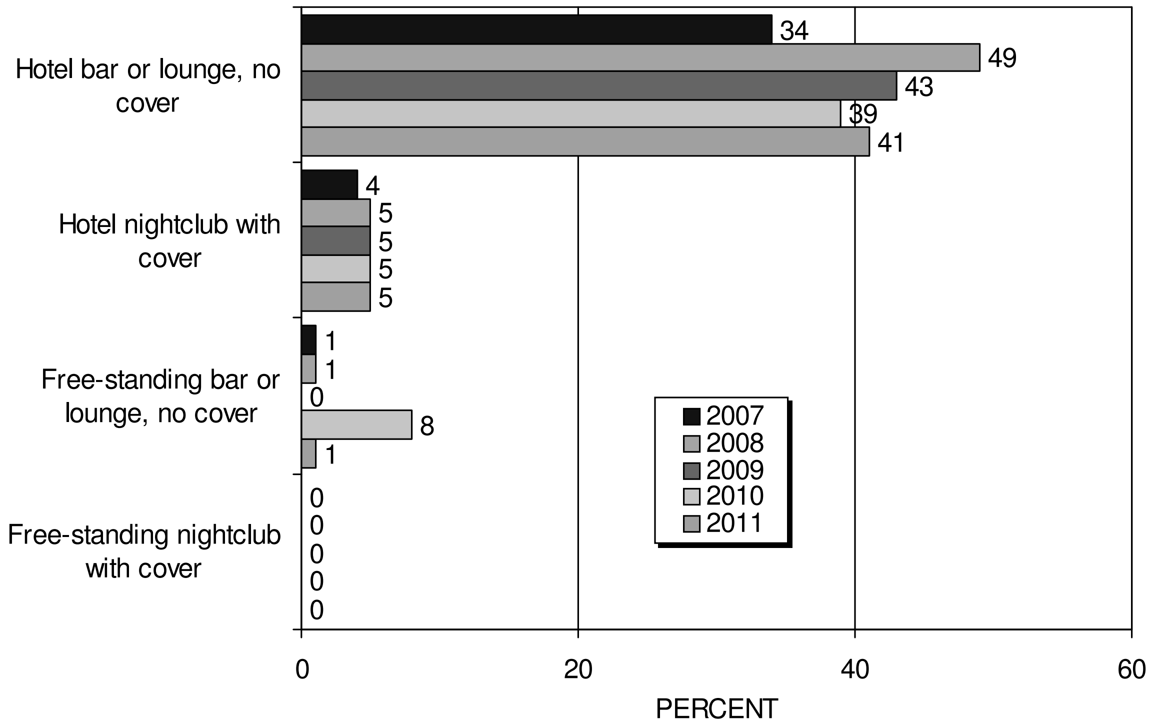
FIGURE 63
Whether Has Been To Other Paid Attractions*



We asked all visitors if they had been to other Las Vegas attractions for which they had to pay, such as the theme parks, water parks, or virtual reality rides (Figure 63). Eighteen percent (18%) said yes, down from 22% in 2007 and 21% in 2008, but up from 16% in 2009.

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

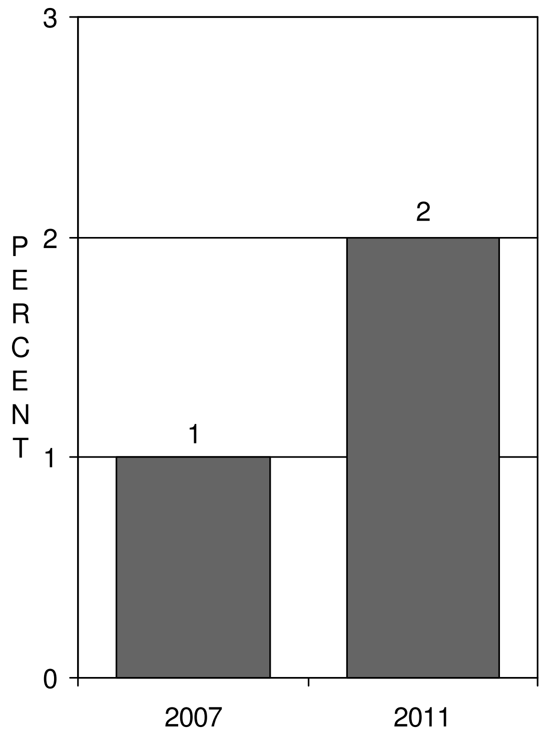
FIGURE 64
Whether Has Been To Nightclubs, Bars, and Lounges*



We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 64). Forty-one percent (41%) of visitors said they had been to a no-cover hotel bar or lounge, up significantly from 34% in 2007 but down from 49% in 2008. Five percent (5%) had been to a hotel nightclub that charged a cover fee, up significantly from 4% in 2007. One percent (1%) had been to a no-cover free-standing bar or lounge (up from less than 1% in 2009 but down from 8% last year), while less than 1% had been to a free-standing nightclub that charged a cover fee.

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

FIGURE 65
Whether Played Golf*

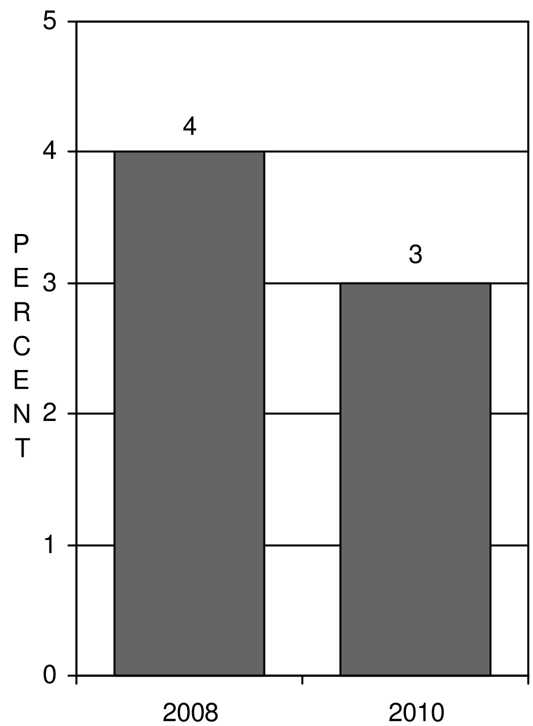


The proportion who said they had played golf during their 2011 visit to Las Vegas was 2%, up from 1% in 2007 (Figure 65).

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

Only "yes" responses are reported in this chart.

FIGURE 66
Whether Visited A Spa*



Beginning in 2008, visitors were asked if they had visited a spa during this trip to Las Vegas. In 2010, 3% said they had, down from 4% in 2008 (Figure 66).

---

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

Only "yes" responses are reported in this chart.

ATTITUDINAL INFORMATION

Ninety-two percent (92%) of visitors said they were "very" satisfied with their visit to Las Vegas in 2011 (up significantly from 89% in 2007 but down from 94% each in 2009 and 2010), while 7% were "somewhat" satisfied (down from 11% in 2007 but up from 5% each in 2009 and 2010) (Figure 67).

FIGURE 67
Satisfaction With Visit

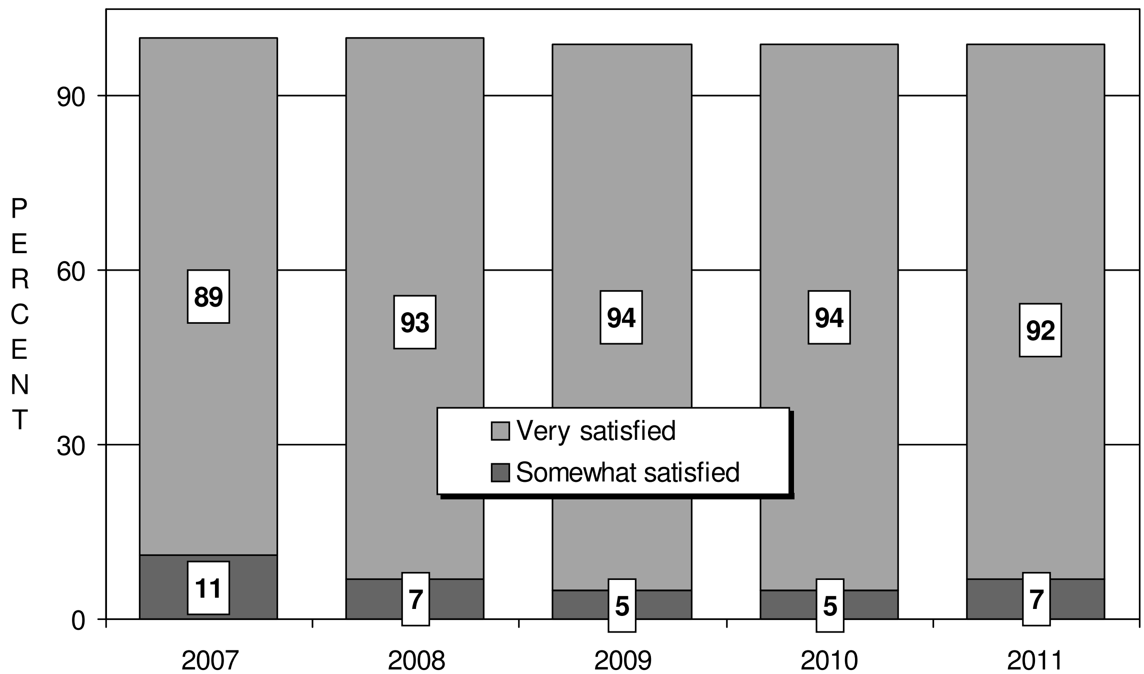
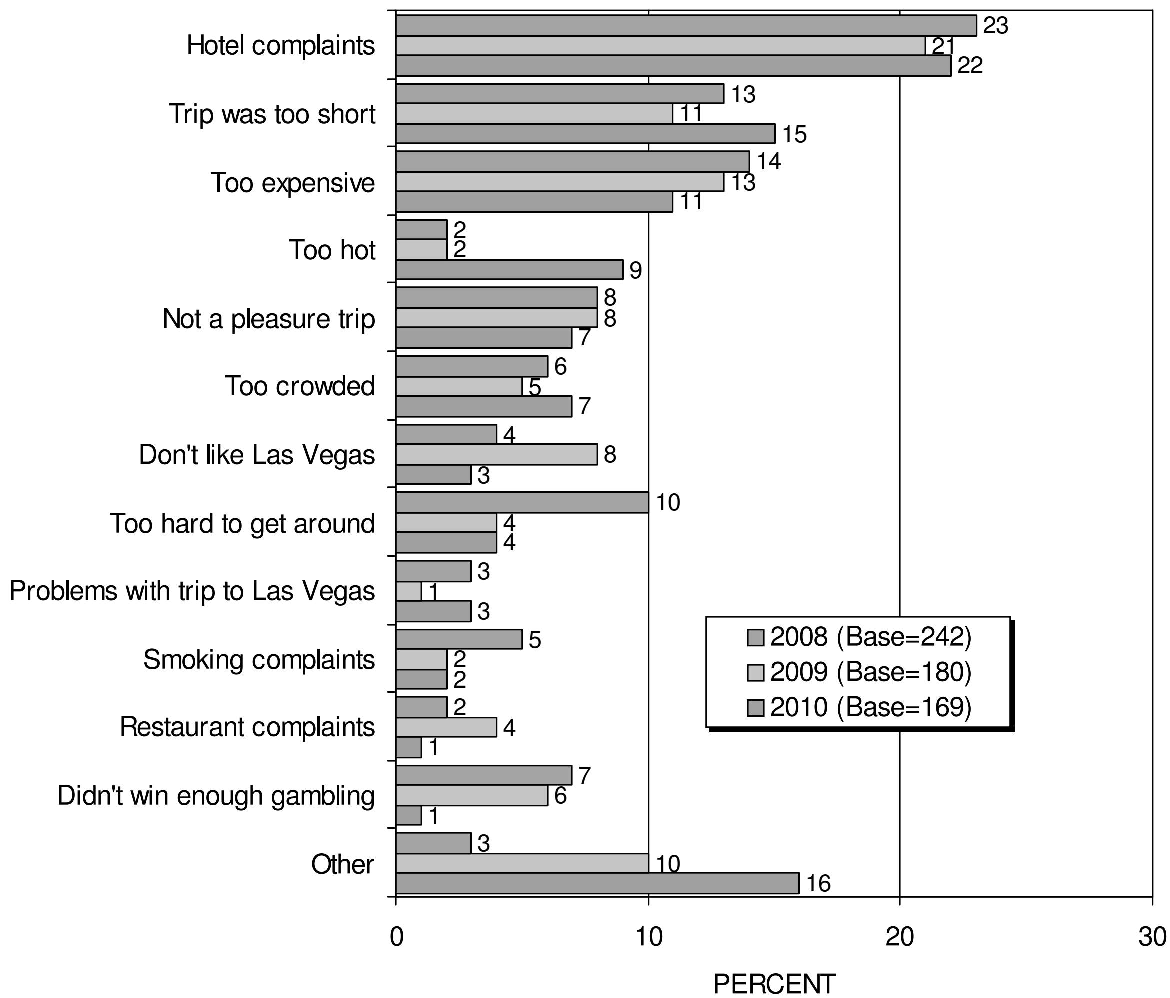


FIGURE 68
Why Not Completely Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied – Asked Every Other Year)



Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 68). Twenty-two percent (22%) had complaints about their hotel. Among other reasons given were that their trip was too short (15%), that they think Las Vegas is too expensive (11%), too hot (9%, up from 2% each in 2008 and 2009), too crowded (7%), or too hard to get around (4%), that it was a business trip and not a pleasure trip (7%), or that they simply don't like Las Vegas (3%). Very few (1%, down from prior years) said it was because they did not win enough gambling.

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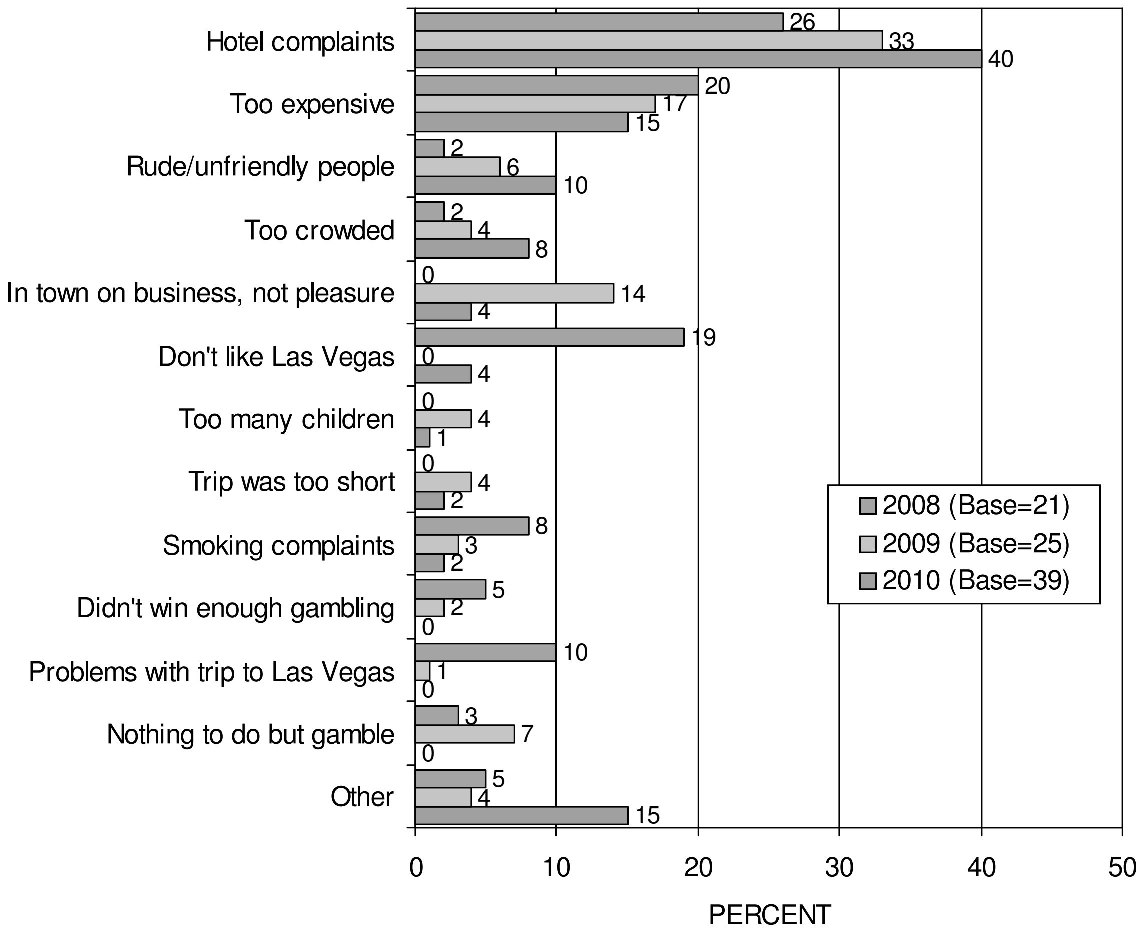
* This question is asked every other year and was not asked in 2007 or 2011. However, it was included in 2009.

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



Very few visitors said they were dissatisfied with their visit to Las Vegas. These few dissatisfied visitors were asked to volunteer why they were not satisfied with their visit (Figure 69). The most frequently mentioned reasons for being dissatisfied were hotel complaints (40%), that they think Las Vegas is too expensive (15%), or encountered rude or unfriendly people (10%).

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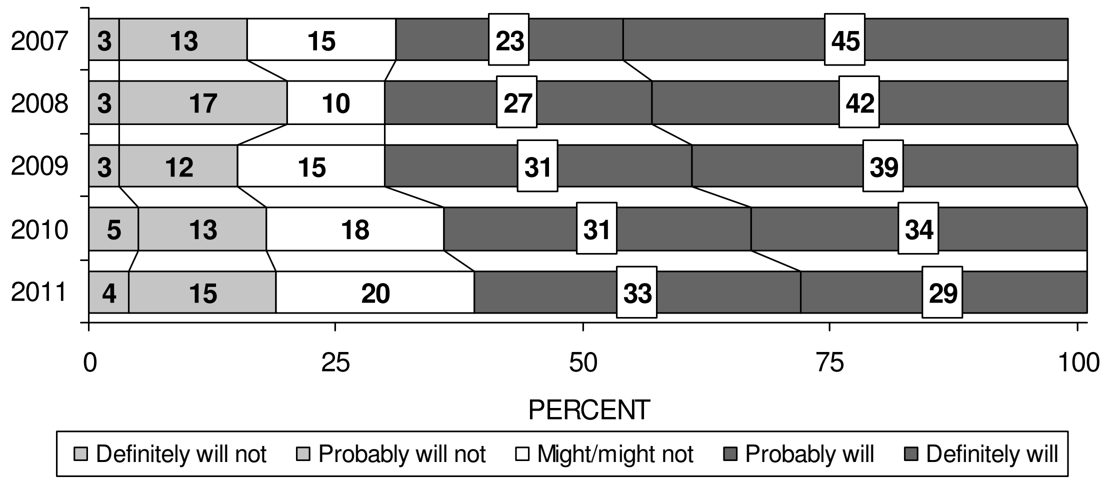
* This question is asked every other year and was not asked in 2007 or 2011. However, it was included in 2009.

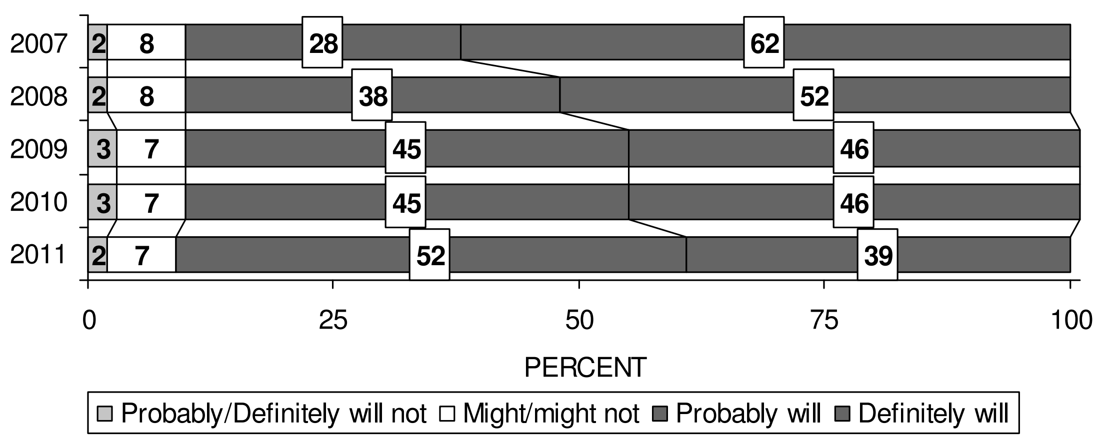
Note very small base sizes for 2008 and 2009.

FIGURE 70
Likelihood of Returning to Las Vegas Next Year



Visitors were asked how likely they are to return to Las Vegas the following year (Figure 70). Twenty-nine percent (29%) said they "definitely" will return to Las Vegas next year (down significantly from prior years), while 33% said they "probably" will return to Las Vegas (up from 23% in 2007 and 27% in 2008).

FIGURE 71
Likelihood of Recommending Las Vegas to Others



Visitors were asked how likely they are to recommend Las Vegas to others (Figure 71). In 2011, 39% said they "definitely" will recommend Las Vegas (down from prior readings), while 52% said they "probably" will recommend Las Vegas (up from 2007-2010 results).

VISITOR DEMOGRAPHICS

As figure 72 shows, visitors in 2011 were likely to be married (77%, down from 80% in 2008), earning $40,000 or more (87%, up significantly from 2007 – 2010 results), and employed (66%). One-quarter (25%) were retired (down from 28% each in 2008 and 2009). The proportion of visitors who were 40 years old or older was 70% (down from 76% in 2008 and 72% in 2009), and the average age was 49.0 (down significantly from 50.6 in 2008 and 50.0 in 2009).

FIGURE 72
VISITOR DEMOGRAPHICS

	2007	2008	2009	2010	2011
GENDER					
Male	50%	51%	50%	50%	51%
Female	50	49	50	50	49
MARITAL STATUS					
Married	79	80	78	79	77
Single	14	13	15	14	15
Separated/Divorced	5	5	5	5	5
Widowed	3	2	3	2	3
EMPLOYMENT					
Employed	67	66	65	66	66
Unemployed	1	1	2	2	1
Student	2	2	2	3	3
Retired	26	28	28	27	25
Homemaker	4	4	3	3	4
EDUCATION					
High school or less	27	28	25	23	20
Some college	24	21	24	24	25
College graduate	44	45	47	48	50
Trade/vocational school	5	7	4	5	5
AGE					
21 to 29	11	10	11	10	12
30 to 39	18	15	16	19	18
40 to 49	22	21	21	23	22
50 to 59	20	22	19	19	19
60 to 64	9	11	10	9	9
65 or older	20	22	22	20	20
MEAN	49.0	50.6	50.0	49.2	49.0
BASE	(3596)	(3601)	(3600)	(3601)	(3600)

More than one-half (55%, up from 52% each in 2007 and 2008) of visitors were from the western United States, with the bulk of them coming from California (31%, up from 28% in 2008) (Figure 73). Sixteen percent (16%) of visitors were from foreign countries, up significantly from 12% in 2007, but down from 18% last year.

FIGURE 73

VISITOR DEMOGRAPHICS

	2007	2008	2009	2010	2011
ETHNICITY					
White	86%	90%	88%	86%	86%
African American/Black	5	4	4	5	4
Asian/Asian American	3	2	2	3	3
Hispanic/Latino	5	4	5	6	7
Other	1	0	1	1	1
HOUSEHOLD INCOME					
Less than $20,000	2	1	1	1	1
$20,000 to $39,999	8	5	6	7	3
$40,000 to $59,999	18	18	20	17	14
$60,000 to $79,999	21	24	25	24	24
$80,000 to $99,999	16	19	18	16	17
$100,000 or more	24	22	20	24	32
Not sure/no answer	10	12	9	10	10
VISITOR ORIGIN					
U.S.A.	88	85	86	82	84
Eastern states*	9	8	7	6	6
Southern states†	13	13	11	11	12
Midwestern states‡	14	12	12	12	11
Western states§	52	52	55	54	55
California	31	28	31	30	31
Southern California	25	24	26	26	26
Northern California	6	4	5	4	5
Arizona	9	9	10	7	9
Other Western states	13	15	14	16	15
Foreign	12	15	14	18	16
BASE	(3596)	(3601)	(3600)	(3601)	(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 2011

RESPONDENT ID# ____ ____ ____ ____

INTERVIEW DATE: ___ ___/___ ___/___ ___

INTERVIEW LOCATION CODE ____ ____ ____ ____

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

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

INTERVIEW LENGTH ____ ____ MIN.

INTERVIEWER ID # ____ ____

RESPONDENT GENDER (BY OBSERVATION)

MALE 51%
FEMALE 49

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

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

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

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

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

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

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

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

FIRST VISIT 16%	**SKIP TO Q7 ON PAGE 2**
VISITED BEFORE............84	**ASK Q5**

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

1 ....24%
2-3..31
4-5..15
6-10..15
OVER 10..14
6.2 MEAN
3.0 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 ....68%
2-3...23
4-5..7
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 10%
TO ATTEND A CORPORATE MEETING 0
TO GAMBLE 7
INCENTIVE TRAVEL PROGRAM 0
VACATION/PLEASURE 50
VISIT FRIENDS/RELATIVES 13
TO ATTEND A SPECIAL EVENT 5
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 1%
OTHER BUSINESS PURPOSES 6
JUST PASSING THROUGH 5
WEDDING/TO GET MARRIED 3
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 10%
NO 90
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=351)

MORE INTERESTED 41%
LESS INTERESTED 1
NO DIFFERENCE 58
NOT SURE/DK 0
REFUSED/NA 1

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

(N=351)

YES 37%
NO 63
DK/NA 1

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

Air 44%
Bus (NET) 2
(IF "YES" ASK, "Do you mean...":)
Regularly scheduled bus service like Greyhound 0
Or a chartered or escorted bus service or bus tour 2
Automobile 51
Truck 1
Motorcycle 0
Recreational Vehicle (RV) 3

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

A.	Your own vehicle	49%
B.	Rental car	12
C.	Limousine	2
D.	Bus	16
E.	Hotel/motel shuttle	18
H	Monorail	6
G.	Taxi	24
	WALKED	25
	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	4
4-6 DAYS BEFORE	2
7-14 DAYS BEFORE	16
15-30 DAYS BEFORE	29
31-60 DAYS BEFORE	23
61-90 DAYS BEFORE	11
MORE THAN 90 DAYS BEFORE	16
NOT SURE/DK	0
REFUSED/NA	0

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

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

15. Did the travel agent... **(READ LIST)** (N=457)

Influence your decision to visit Las Vegas?	3%
Influence your choice of accommodations?	78
"Book" your accommodations?	86
"Book" your transportation?	96

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

YES	55%	**ASK Q17**
NO	45	**SKIP TO Q20**
NOT SURE/DK	0	
REFUSED/NA	0	

17. Did you use the Internet to book your transportation? (N=1977)

YES	54%	**ASK Q18**
NO	46	**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=1064)

a.	AOL (AMERICA ONLINE)	1%
b.	CHEAPTICKETS	2
c.	EXPEDIA.COM	12
d.	HOTWIRE.COM	1
e.	MAPQUEST.COM	0
f.	ORBITZ	3
g.	PRICELINE.COM	3
h.	TRAVEL.COM	1
i.	TRAVELOCITY	6
j.	YAHOO	0
k.	AIRLINE WEBSITE (ANY)	69
l.	OTHER	3
m.	NOT SURE/DK	0

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

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

(N=1977)

a.	Influenced your decision to visit Las Vegas?	1%
b.	Influenced your choice of accommodations?	52

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 34%	**SKIP TO Q22**
NO 66	**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=1206)

- TO SEE FREMONT STREET EXPERIENCE 64%
- LODGING DOWNTOWN 18
- TO GAMBLE 9
- TO SHOP 0
- TO DINE 1
- TO SIGHTSEE (OTHER THAN FREMONT ST. EXPERIENCE) 7
- TO ATTEND A SPECIAL EVENT 0
- 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. <u>INTERVIEWER</u>: A "LODGING" IS ANY PLACE THE RESPONDENT *SLEPT* OVERNIGHT. SOME PEOPLE COME TO LAS VEGAS AT NIGHT JUST TO GAMBLE THROUGH THE NIGHT AND LEAVE THE NEXT DAY. THESE PEOPLE DID NOT "LODGE" ANYWHERE.)**

TYPE OF LODGING
(ALL RESPONDENTS)

- HOTEL 90%
- MOTEL 5
- RV PARK 3
- FRIENDS/RELATIVES 2
- DAYTRIP/NO LODGING 0

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=3593)

- HOTEL 90%
- MOTEL 5
- RV PARK 3
- FRIENDS/RELATIVES 2

LOCATION OF LODGING
(ALL RESPONDENTS)

- STRIP CORRIDOR 76%
  - ON THE STRIP 59
  - JUST OFF THE STRIP 17
- DOWNTOWN 6
- BOULDER STRIP 4
- OUTLYING AREAS 12
- OTHER 2

LOCATION OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=3593)

- STRIP CORRIDOR 76%
  - ON THE STRIP 59
  - JUST OFF THE STRIP 17
- DOWNTOWN 6
- BOULDER STRIP 4
- OUTLYING AREAS 12
- OTHER 2

23.

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=3455)

Booked by phone, calling the hotel, motel, or RV park directly.........37% Booked through a travel agent (either in person or by phone)......11 Booked by phone but not by calling the hotel directly and not through a travel agent 2	**SKIP TO Q25**
Booked at a website on the Internet..............40	**ASK Q24**
Booked in person at the hotel, motel, or RV park................................4 The trip was a gift, prize, or incentive, so the accommodations were booked for you........1 Not sure because someone else in your party booked the hotel and you don't know how they did it ....5 OTHER (SPECIFY:)........0 REFUSED/NA 0	**SKIP TO Q25**

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

(N=1367)

a. HOTEL WEBSITE (ANY).............32%
b. HOTELS.COM 13
c. EXPEDIA.COM 16
d. LAS VEGAS.COM 6
e. TRAVELOCITY.............................. 6
f. AIRLINE WEBSITE........................ 7
g. ORBITZ... 4
h. CHEAPTICKETS. 1
i. PRICELINE.COM........................... 6
j. VEGAS.COM 3
k. YAHOO 0
l. HOTWIRE..................................... 2
m. OTHER 5
n. 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=3455)

SAME DAY..............................4%

1-3 DAYS BEFORE 3

4-6 DAYS BEFORE 2

7-14 DAYS BEFORE 23

15-30 DAYS BEFORE 47

31-60 DAYS BEFORE 12

61-90 DAYS BEFORE 3

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

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

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

26. Including yourself, how many people stayed in your room? (N=3430)

ONE 13%
TWO 73
THREE.....................................7
FOUR.......................................6
FIVE...1
SIX OR MORE..........................0
REFUSED/NA...........................0
2.1 MEAN
2.00 MEDIAN

27. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=3366)

HOTEL/TRANSPORTATION PACKAGE DEAL .... 16% HOTEL/AMENITIES PACKAGE DEAL .... 1 TOUR/ TRAVEL GROUP 1	**ASK Q28**
CONVENTION GROUP/ COMPANY MEETING ...... 5 CASINO RATE.................. 4 REGULAR FULL-PRICE ROOM RATE 18	**SKIP TO Q30**
CASINO COMPLIMENTARY......... 16	**SKIP TO Q32**
ANOTHER RATE............ 40	**SKIP TO Q30**

28. What was the total PER PERSON cost of your package? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS.)** (N=586)

$0-$99 ....1%
$100-$199 1
$200-$299 5
$300-$399 11
$400-$499 18
$500-$999 41
$1000 OR MORE 21
NOT SURE/REFUSED....................2
$757.83 MEAN
$590.00 MEDIAN

29. Where did you first hear about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=586)

NEWSPAPER.................................. 0%
TELEVISION.................................... 0
TRAVEL AGENT 42
WORD OF MOUTH 4
OFFER RECEIVED IN THE MAIL.... 0
BROCHURE 0
E-MAIL OFFER................................. 0
INTERNET AD................................ 19
ANY WEBSITE 33
RESERVATION AGENT/ CALL CENTER 1
OTHER 0
NOT SURE/NO ANSWER................ 1

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=2255)

$0-$35...6%
$36-$50.. 19
$51-$100.. 53
$101 OR MORE............................. 20
NOT SURE/REFUSED..................... 3
$84.04 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=2255)

NEWSPAPER	0%
TELEVISION	0
RADIO	0
TRAVEL AGENT	7
WORD-OF-MOUTH	9
OFFER RECEIVED IN THE MAIL	3
BROCHURE	1
E-MAIL OFFER	1
INTERNET AD (POP-UP OR BANNER AD)	14
ANY WEBSITE	32
OUTDOOR BILLBOARD	0
RESERVATION AGENT/ CALL CENTER	33
OTHER	0
NOT SURE/DK	1

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	11%
2	70
3	7
4	9
5 OR MORE	4

2.31 MEAN
2.00 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	6
2	19
3	28
4	21
5 OR MORE	25

3.7 MEAN
3.0 MEDIAN

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

1	0%
2	6
3	19
4	28
5	21
6 OR MORE	25

4.7 MEAN
4.0 MEDIAN

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

SUNDAY	13%
MONDAY	14
TUESDAY	14
WEDNESDAY	14
THURSDAY	15
FRIDAY	20
SATURDAY	11

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

YES 77%	**ASK Q41**
NO 23	**SKIP TO Q43**

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=2759)

2 OR LESS 54%
  LESS THAN 1 HOUR 20
  ONE HOUR 15
  TWO HOURS 19
3 TO 4 23
5 TO 6 13
7 TO 8 8
9 TO 10 2
MORE THAN 10 0
<u>2.9</u> MEAN
<u>2.0</u> MEDIAN

42. Which type of casino game do you play MOST OFTEN. (N=2759)

SLOT MACHINES 63%
VIDEO POKER 9
OTHER VIDEO MACHINES (21, KENO, ETC.) 1
BLACKJACK 14
CRAPS 3
KENO 1
POKER 5
RACE/SPORTSBOOK 1
ROULETTE 2
OTHER 0
NOT SURE/DK 0
REFUSED/NA 0

43. Not including travel, food, or lodging, how much money did you budget for gambling on this trip? Include only your own, personal, gambling budget and not the gambling budgets of others who may have been with you. (N=2759)

$0-$99 .... 16%
$100-$199 20
$200-$299 14
$300-$399 12
$400-$499 9
$500-$599 11
$600 OR MORE 16
NOT SURE/REFUSED 3
<u>$447.63</u> MEAN
<u>$250.00</u> MEDIAN

44. Where have you gambled during your visit to Las Vegas? **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=2759)

Downtown Las Vegas (that is, on or near Fremont Street)	29%
On the Strip (that is, on Las Vegas Boulevard)	84
Just off the Strip (for example, The Rio, LV Hilton, Continental)	15
Boulder Hwy & Henderson (Sam's Town, Showboat, Nevada Palace, etc.)	8
North Las Vegas (Santa Fe, Texas Station, Fiesta, etc.)	1
Outlying areas (Jean, Mesquite, Searchlight, etc.)	0
OTHER (SPECIFY:)	2

45. **(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 7%
4 -SOMEWHAT MORE LIKELY 20
3 -NO DIFFERENCE 73
2 -SOMEWHAT LESS LIKELY 0
1 -MUCH LESS LIKELY 0
NOT SURE/DK 0
REFUSED/NA 0
<u>3.3</u> MEAN
<u>3.0</u> MEDIAN

46. 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.)**

47. **(ASK FOR EVERY "YES" IN Q46.)** And how many **(INSERT EACH TYPE MENTIONED IN Q43)** have you seen during this trip? **(RECORD TWO-DIGIT NUMBER IN APPROPRIATE BLANKS.)**

	Q46				Q47	
	YES	NO	DK	NA	MEAN	
A. Big-name headliner performers in Las Vegas for a special concert (for example, Elton John, Jerry Seinfeld, Barry Manilow, Tim McGraw, Faith Hill, etc.)	10%	90%	0%	0%	1.1	(N=365)
B. Broadway/production shows	23	77	0	0	1.2	(N=819)
C. Comedy shows or revues (for example, Improv, Comedy Stop, etc.)	6	94	0	0	1.1	(N=232)
D. Lounge acts or other kinds of free entertainment provided at a location other than the "main" show room	43	57	0	0	1.7	(N=1563)

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

YES (HAS *NOT* SEEN ANY SHOWS)	NO (HAS SEEN SHOWS)
40%	60%

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

YES 18%

NO 82

NOT SURE/DK 0

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

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

A. A nightclub in a hotel with a cover charge?................. 5%

B. A free-standing nightclub with a cover charge? 0

C. A bar or lounge in a hotel without a cover charge? 41

D. Any free-standing bar or lounge without a cover charge? 1

51. 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.)**

$274.69 MEAN (INCLUDING $0)
$275.27 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.)**

$64.25 MEAN (INCLUDING $0)
$103.02 MEAN (EXCLUDING $0)

52. 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).....	$129.34 $211.73	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)	$47.52 $119.77	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)
C. Sightseeing	$10.24 $198.31	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)
X. Other	$3.88 $197.27	MEAN (INCLUDING $0) MEAN (EXCLUDING $0)

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

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

Very satisfied................................92%
Somewhat satisfied 7
Somewhat dissatisfied....................1
Very dissatisfied 0
DO NOT READ
NOT SURE/DK...............................0
REFUSED/NA 0

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

Definitely will (5) 29%
Probably will (4)...........................33
Might/might not (3) 20
Probably will not (2).....................15
Definitely will not (1) 4
NOT SURE/NO ANSWER............0

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

Definitely will recommend (5) 39%
Probably will recommend (4).......52
Might/might not recommend (3) 7
Probably will not recommend (2)...2
Definitely will not recommend (1) ..0
NOT SURE/NO ANSWER.............0

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

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

Employed 66%	**ASK Q59**
Unemployed .... 1 Student .... 3 Retired .... 25 Homemaker 4	**SKIP TO Q60**
<u>DO NOT READ</u> REFUSED/NA 0	**SKIP TO Q60**

59. 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=2392)

Professional/technical 26%
Managers/proprietors 22
Sales/clerical 25
Craft workers 11
Service workers 15
Laborers (non-agricultural) 0
Agricultural 1

60. 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) 20

SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 25

GRADUATED COLLEGE 41

GRADUATE SCHOOL (MASTER'S OR PH.D.) 10

TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 5

REFUSED/NA 0

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

Married 77%
Single 15
Separated or divorced 5
Widowed 3
REFUSED/NA 0

62. What country do you live in?

USA 84%	**ASK Q63**
FOREIGN 16	**SKIP TO Q64**

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

EAST 6%
SOUTH 12
MIDWEST 11
WEST 55
  CALIFORNIA 31
    NORTHERN CA. 5
    SOUTHERN CA. 26
  ARIZONA 9
  OTHER WEST 15
FOREIGN VISITORS 16

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

WHITE 86%

BLACK OR AFRICAN AMERICAN 4

ASIAN OR ASIAN AMERICAN 3

HISPANIC/LATINO 7

NATIVE AMERICAN, MIXED RACE, OTHER 1

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

49.0 MEAN
49.0 MEDIAN

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

21 to 29	12%
30 to 39	18
40 to 49	22
50 to 59	19
60 to 64	9
65 and older	20
REFUSED/NA	0

66. 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	2
D. $40,000 to $49,999	5
E. $50,000 to $59,999	9
F. $60,000 to $69,999	13
G. $70,000 to $79,999	11
H. $80,000 to $89,999	11
I. $90,000 to $99,999	6
J. $100,000 to $149,999	26
K. $150,000 or more	5
NOT SURE/NO ANSWER	10

CARD A

HOTEL/MOTEL RATES

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

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

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

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

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

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

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

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

INCOME CATEGORIES

A. Less than $20,000

B. $20,000 to $29,999

C. $30,000 to $39,999

D. $40,000 to $49,999

E. $50,000 to $59,999

F. $60,000 to $69,999

G. $70,000 to $79,999

H. $80,000 to $89,999

I. $90,000 to $99,999

J. $100,000 to $149,999

K. $150,000 or more

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