


2008 Las Vegas Visitor Profile Study

LAS VEGAS CONVENTION and VISITORS AUTHORITY glsresearch

Research that works.

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LAS VEGAS VISITOR PROFILE

Calendar Year 2008

Annual Report

Prepared for:

Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

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VISITOR PROFILE STUDY

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EXECUTIVE SUMMARY

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

This report presents the findings from in-person interviews GLS Research collected as follows: 3,300 from January 1, 2004 to December 31, 2004; 3,600 from January 1, 2005 to December 31, 2005; January 1, 2006 to December 31, 2006; January 1, 2007 to December 31, 2007; and January 1, 2008 to December 31, 2008. Approximately 275 in-person interviews were conducted per month in or near Las Vegas hotel-casinos and motels in 2004, and approximately 300 interviews were conducted per month in 2005, 2006, 2007, and 2008.

This report presents the results of calendar year 2008, as well as the four previous years (2004, 2005, 2006, and 2007). 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 2008. These questions will be rotated back into the questionnaire in Calendar Year 2009 and subsequently asked every other year. In addition, several new questions were added to the Las Vegas Visitor Profile Study in Calendar Year 2008. 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.

NOTE: The impact of the national and global economic slowdown that became more pronounced in the last quarter of 2008 and the early months of 2009 is only partially reflected in the 2008 Las Vegas Visitor Profile. The data reported here represents trip characteristic averages for visitors in Las Vegas over the course of the <u>entire</u> year of 2008. National and global economic factors negatively affecting the travel industry – especially in terms of the number of people traveling – are not accounted for in this report.

REASONS FOR VISITING — EXECUTIVE SUMMARY

Sixteen percent (16%) of 2008 visitors indicated they were first-time visitors to Las Vegas, down from previous years. Four in ten (39%) of all visitors said their primary reason for visiting Las Vegas this trip was vacation or pleasure, similar to last year, but down from 2004-2006 readings. Thirteen percent (13%) said they came to gamble (up from previous years), and 11% said they came to visit friends and relatives. Among repeat visitors, 36% came for vacation or pleasure (similar to last year, but down from 2004-2006), 15% came to gamble, and 12% came to visit friends and relatives. The majority of first-time visitors continue to come primarily for vacation or pleasure (57%), with few (2%) saying they came to gamble. Nine percent (9%) of first-time visitors said they were visiting friends and relatives. The average number of visits over the past five years was 6.8, up from the prior four years. The average number of visits in the past year was 1.8.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2004	2005	2006	2007	2008
Proportion of visitors who were first-time visitors	19%	18%	19%	19%	16%
Proportion of visitors whose primary purpose for current trip was vacation or pleasure	63%	61%	49%	42%	39%
Proportion of visitors whose primary purpose for current trip was to gamble	4%	5%	11%	11%	13%
Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	7%	7%	11%	13%	11%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	62%	59%	46%	38%	36%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	5%	6%	13%	14%	15%
Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	7%	8%	12%	14%	12%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	68%	69%	67%	60%	57%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	1%	1%	1%	1%	2%
Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	5%	5%	5%	8%	9%
Average number of visits in past five years	6.5	6.3	6.2	6.3	6.8
Average number of visits in past year	1.8	1.7	1.7	1.8	1.8

TRAVEL PLANNING — EXECUTIVE SUMMARY

Fifty-seven percent of visitors (57%) arrived via ground transportation, and 43% arrived by air. Forty-eight percent (48%) of visitors said they used their own vehicles while traveling around Las Vegas, up significantly from 41% in 2004. Taxi use stands at 25%, while 31% of visitors volunteered that they walked while in Las Vegas.

The proportion of visitors who reported using a travel agent to plan their current trip to Las Vegas was 15% in 2008, the same as last year, but a decline from 20% in 2004. Visitors were asked if they used the Internet to plan their current trip to Las Vegas, and 44% said they had done so, up from 39% in 2004, and 40% each in both 2005 and 2007. Of these visitors, 54% said they booked their accommodations online (down significantly from past years), while 59% said they used the Internet to book their transportation, down from 63% last year. The proportion who said they found information online that influenced their choice of accommodations was 49%, up significantly from past years.

The proportion of visitors who said they had visited Downtown Las Vegas was 46%, up from 40% last year.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2004	2005	2006	2007	2008
Proportion of visitors who traveled to Las Vegas by ground transportation (automobile/bus/RV)	53%	53%	54%	54%	57%
Proportion of visitors who traveled to Las Vegas by air	47%	47%	46%	46%	43%
Proportion of visitors who used their own vehicle when traveling around Las Vegas	41%	47%	48%	46%	48%
Proportion of visitors who reported walking when traveling around Las Vegas	40%	24%	39%	36%	31%
Proportion of visitors who used taxis when traveling around Las Vegas	27%	26%	29%	27%	25%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Las Vegas	20%	17%	16%	15%	15%
Proportion who used the Internet to plan trip	39%	40%	43%	40%	44%
Proportion of those who used the Internet who said they did so to book accommodations	79%	75%	62%	60%	54%
Proportion of visitors who used the Internet to book transportation	56%	55%	57%	63%	59%
Proportion of visitors who used the Internet, and it influenced their choice in accommodations	42%	32%	37%	34%	49%
Proportion of visitors who visited Downtown Las Vegas on their current trip	57%	46%	48%	40%	46%

TRIP CHARACTERISTICS AND EXPENDITURES — EXECUTIVE SUMMARY

The average party size in 2008 was 2.4 persons, down significantly from past years. Six percent of visitors (6%) had children under the age of 21 in their immediate party, down significantly from 9% in 2005 and 10% each in 2004 and 2006. Virtually all (99.6%) visitors stayed overnight.

Visitors in the 2008 study stayed an average of 3.5 nights and 4.5 days in Las Vegas, the same as last year. Among overnighters, 94% stayed in a hotel or motel with an average of 2.1 room occupants. Visitors spent an average of $101.68 per night on lodging this year, down significantly from $107.12 in 2006 and $108.87 last year. One-third (32%) of visitors staying in a hotel or motel paid a regular room rate, similar to last year (33%), but down from 41% in 2004, 43% in 2005, and 38% in 2006. Fifteen percent (15%) purchased a package trip, down significantly from 19% in 2004. The average cost of such a package in 2008 was $746.69, up significantly from $561.49 in 2004, $571.43 in 2005, and $662.78 in 2006.

Over the course of their entire stay in Las Vegas, visitors spent an average of $273.39 for food and drink (up from past readings), and $59.26 for local transportation (down significantly from $68.70 in 2006). Visitors spent an average of $121.90 for shopping (down significantly from $140.86 in 2006), $51.64 on shows, and $7.12 on sightseeing.

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2004	2005	2006	2007	2008
Average number of adults in immediate party	2.6	2.5	2.6	2.5	2.4
Proportion of visitors with persons under 21 in their immediate party	10%	9%	10%	8%	6%
Proportion of visitors who stayed overnight	99%	99%	99%	99%	99.6%
Days stayed (average)	4.6	4.5	4.6	4.5	4.5
Nights stayed (average)	3.6	3.5	3.6	3.5	3.5
Proportion of visitors who stayed in a hotel or motel room	96%	95%	94%	95%	94%
Number of room occupants (average — hotel/motel only)	2.1	2.1	2.2	2.2	2.1
Lodging expenditures (average per night — non-package)	$86.22	$99.51	$107.12	$108.87	$101.68
Proportion of visitors who paid a regular room rate	41%	43%	38%	33%	32%
Proportion of visitors who bought a package or travel group trip	19%	17%	15%	14%	15%
Average cost of package per person (among package/tour group visitors)	$561.49	$571.43	$662.78	$709.90	$746.69
Average trip expenditures for food and drink	$238.32	$248.40	$260.68	$254.49	$273.39
Average trip expenditures for local transport	$64.62	$60.46	$68.70	$62.66	$59.26
Average trip expenditures for shopping	$124.39	$136.60	$140.86	$114.50	$121.90
Average trip expenditures for shows	$47.21	$49.43	$50.81	$47.87	$51.64
Average trip expenditures for sightseeing	$8.01	$8.21	$8.49	$8.31	$7.12

GAMING BEHAVIOR AND BUDGETS — EXECUTIVE SUMMARY

Eighty-five percent (85%) of 2008 visitors said they gambled while in Las Vegas, down significantly from 87% each in 2004 and 2006. Gamblers spent an average of 3.3 hours per day gambling, down significantly from 3.6 in 2005. The average gaming budget in 2008 was $531.98, down significantly from $626.50 in 2005 and $651.94 in 2006. Thirty-eight percent (38%) 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% last year.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2004	2005	2006	2007	2008
Proportion who gambled while visiting Las Vegas	87%	86%	87%	84%	85%
Average number of hours per day spent gambling (among those who gambled)	3.3	3.6	3.3	3.4	3.3
Average trip gambling budget (among those who gambled)	$544.93	$626.50	$651.94	$555.64	$531.98
Proportion who said they would be “more likely” to visit Las Vegas even with more places to gamble outside Las Vegas	29%	39%	36%	48%	38%

ENTERTAINMENT — EXECUTIVE SUMMARY

Over seven in ten visitors (72%) attended shows during their current stay, up from 63% last year, but down from 82% in 2004 and 76% in 2006. Among those who saw a show in Las Vegas, 74% went to a lounge act, up significantly from 64% last year. Attendance for comedy shows (14%) was down significantly from 21% last year. Eighteen percent (18%) of visitors who saw shows saw a big-name headliner, similar to 17% in 2006 and 19% last year. Twenty-one percent (21%) of all visitors said they had been to other paid attractions in Las Vegas, down from 28% in 2006.

SUMMARY TABLE OF ENTERTAINMENT ACTIVITIES

	2004	2005	2006	2007	2008
Proportion who attended any shows during their current stay in Las Vegas	82%	71%	76%	63%	72%
Proportion who attended lounge acts (among those who attended shows)*	—	—	75%	64%	74%
Proportion who attended big-name headliner performances (among those who attended shows)*	—	—	17%	19%	18%
Proportion who attended comedy shows (among those who attended shows)*	—	—	14%	21%	14%
Proportion who went to other paid attractions in Las Vegas	21%	23%	28%	22%	21%

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

ATTITUDINAL INFORMATION — EXECUTIVE SUMMARY

Ninety-three percent (93%) of visitors reported being “very satisfied” with their trip to Las Vegas, up from 89% last year, but down from 96% in 2006.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2004	2005	2006	2007	2008
Proportion who were “very satisfied” with their current trip to Las Vegas	93%	94%	96%	89%	93%

VISITOR DEMOGRAPHICS — EXECUTIVE SUMMARY

Visitors in 2008 were likely to be married (80%, similar to last year, but up significantly from 73% in 2004 and 74% in 2005), earning $40,000 or more (83%, up significantly from 2004), and employed (66%, down significantly from 70% in 2006). Over one-quarter were retired (28%). The proportion of visitors who were 40 years old or older was 76% (up from past years), and the average age was 50.6, also up significantly from past readings. More than one-half of visitors were from the Western United States (52%), with the bulk of them coming from California (28%, down significantly from past years). Fifteen percent (15%) of visitors were foreign, up significantly from the last four years.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2004	2005	2006	2007	2008
Proportion of visitors who were married	73%	74%	79%	79%	80%
Proportion of visitors with a household income of $40,000 or more	70%	79%	78%	80%	83%
Proportion of visitors who were employed	67%	67%	70%	67%	66%
Proportion of visitors who were retired	26%	24%	24%	26%	28%
Proportion of visitors who were 40 years old or older	72%	68%	69%	71%	76%
Average age	49.0	47.7	48.0	49.0	50.6
Proportion of visitors with a college diploma	42%	44%	48%	44%	45%
Proportion of visitors from the West	48%	52%	52%	52%	52%
Proportion of visitors from California	31%	33%	32%	31%	28%
Proportion of visitors from a foreign country	13%	12%	13%	12%	15%

SUMMARY OF ECONOMIC IMPACT FACTORS — EXECUTIVE SUMMARY

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

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2004	2005	2006	2007	2008
Days stayed (average)	4.6	4.5	4.6	4.5	4.5
Nights stayed (average)	3.6	3.5	3.6	3.5	3.5
Proportion of visitors who stayed overnight	99%	99%	99%	99%	99.6%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	96%	95%	94%	95%	94%
Lodging expenditures (average per night — non-package)	$86.22	$99.51	$107.12	$108.87	$101.68
Proportion of visitors who bought a package or travel group trip	19%	17%	15%	14%	15%
Average cost of package per person (among package/tour group visitors)	$561.49	$571.43	$662.78	$709.90	$746.69
Number of room occupants (average)	2.1	2.1	2.2	2.2	2.1
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Proportion who gambled while visiting Las Vegas	87%	86%	87%	84%	85%
Average trip gambling budget (among those who gambled)	$544.93	$626.50	$651.94	$555.64	$531.98

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 2008. These questions will be rotated back into the questionnaire in Calendar Year 2009 and subsequently asked every other year. In addition, several new questions were added to the Las Vegas Visitor Profile Study in Calendar Year 2008. These questions are noted in the text accompanying the figures in the body of this report.

METHODOLOGY

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

Qualified survey respondents were visitors to Las Vegas (excluding residents of Clark County, Nevada) who were at least 21 years of age. In addition, only visitors who planned to leave Las Vegas within 24 hours were asked to complete the survey.

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

Visitors were intercepted in the vicinity of Las Vegas casinos, hotels, motels, and RV parks. To assure a random selection of visitors, different locations were utilized on each interviewing day, and interviewing was conducted at different times of the day. Upon completion of the interview, visitors were given souvenirs as incentives. Verification procedures were conducted throughout the project to assure accurate and valid interviewing.

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

Throughout this report, bar charts are used to illustrate the data. The data presented in these charts are based on the total sample of respondents for 2008 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 2008 study, as well as for the previous four calendar years (2004, 2005, 2006, and 2007). 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 2008. These questions will be rotated back into the questionnaire in Calendar Year 2009 and subsequently asked every other year. In addition, several new questions were added to the Las Vegas Visitor Profile Study in Calendar Year 2008. 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 2008 visitors indicated they were first-time visitors to Las Vegas, down significantly from the previous four years (Figure 1). Eighty-four percent (84%) were repeat visitors, up from the past four years.

FIGURE 1
First Visit vs. Repeat Visit

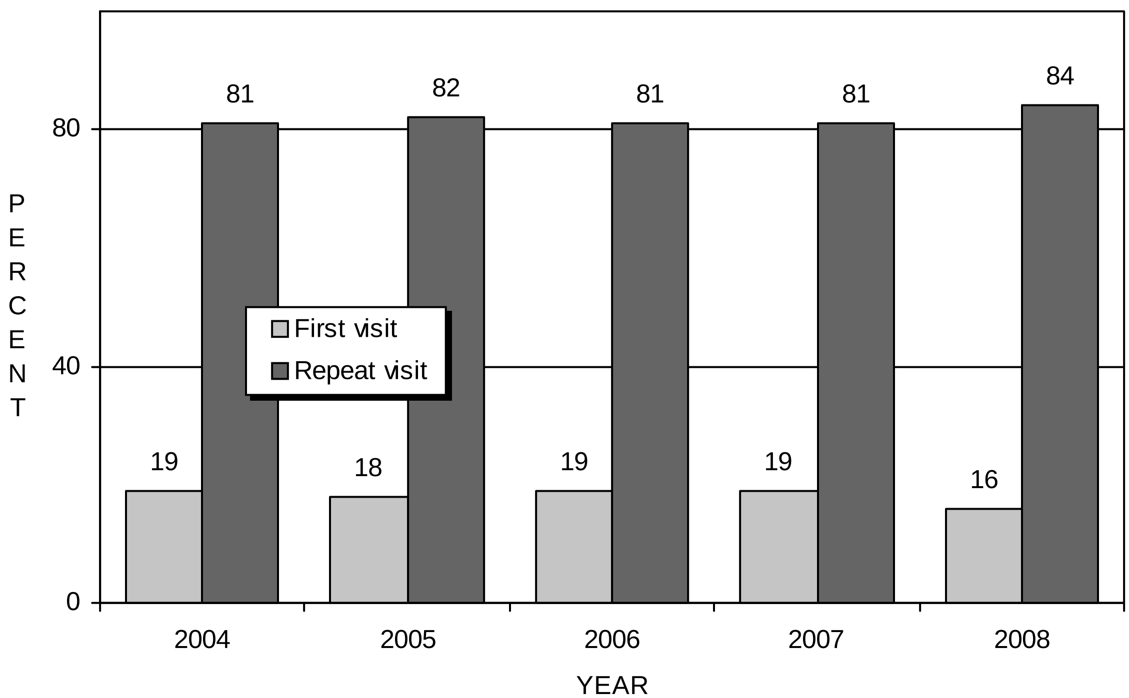
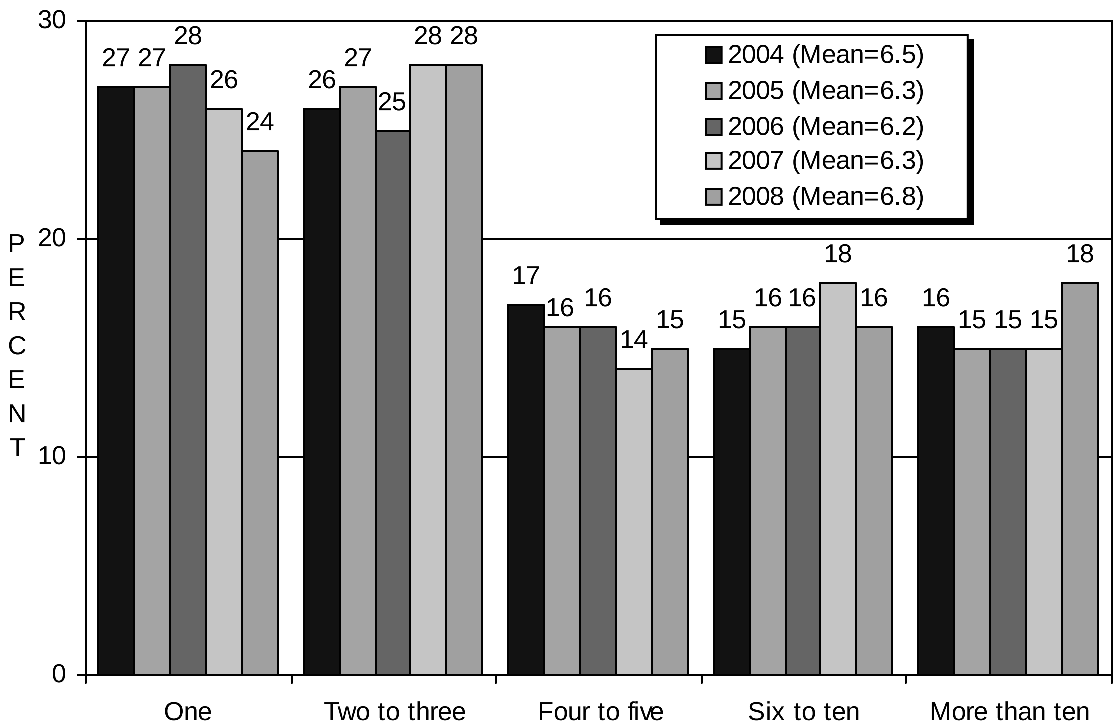
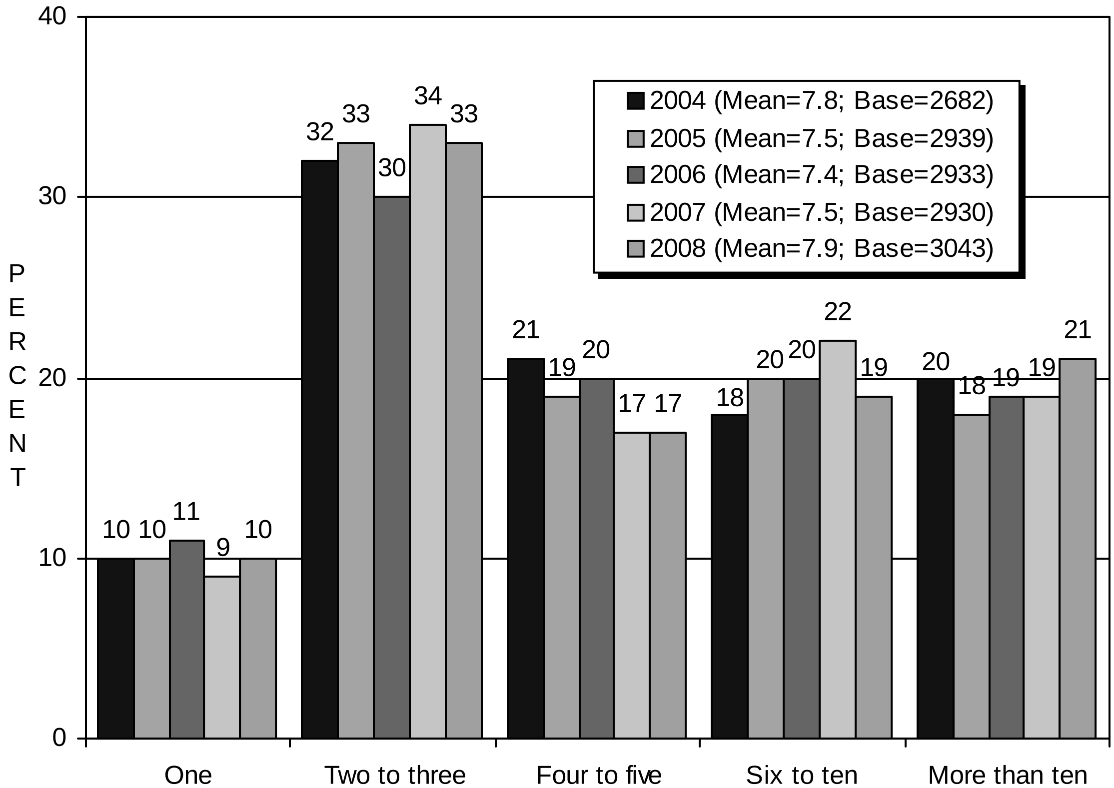


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



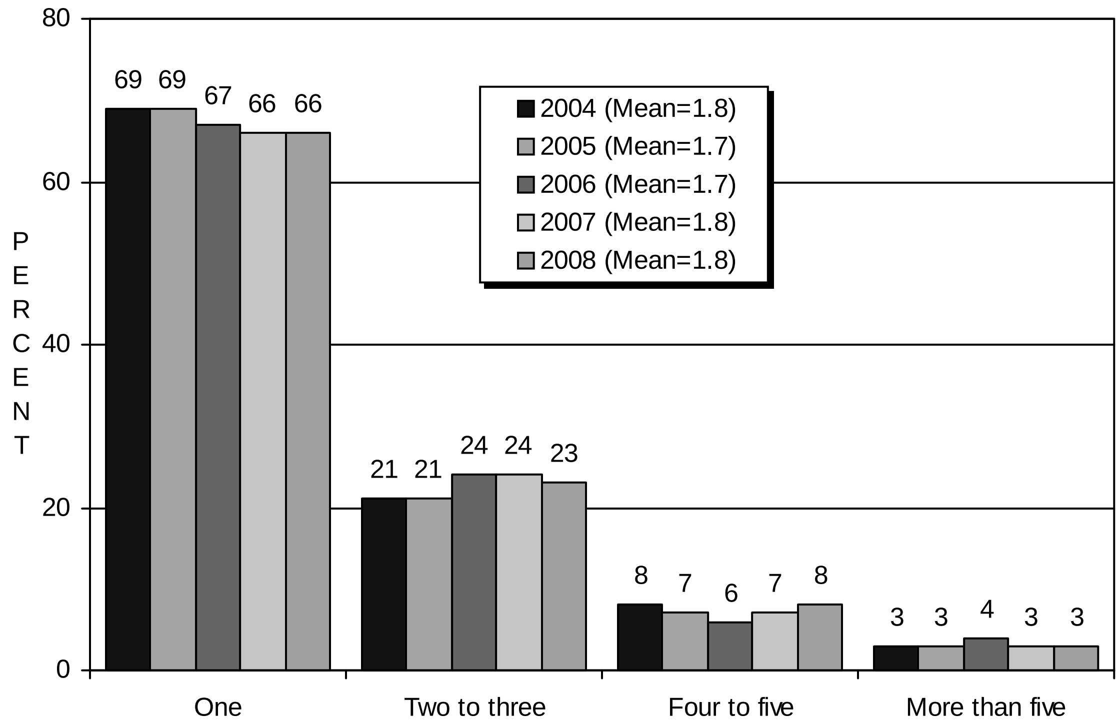
Among all visitors, the average number of visits to Las Vegas over the past five years was 6.8, up significantly from 6.3 in 2005, 6.2 in 2006, and 6.3 in 2007 (Figure 2). Eighteen percent (18%) of visitors said they visited Las Vegas more than ten times in the past five years, also a significant increase compared to 2005, 2006, and 2007.

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



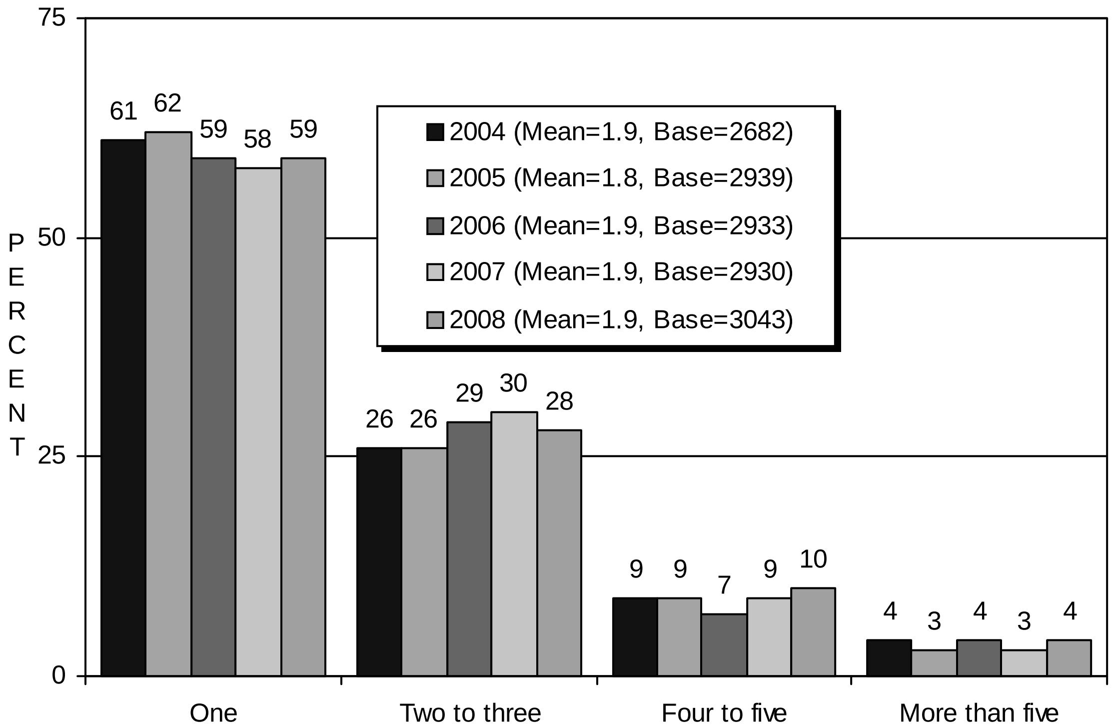
In 2008, *repeat visitors* reported making an average of 7.9 visits to Las Vegas in the past five years (Figure 3).

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



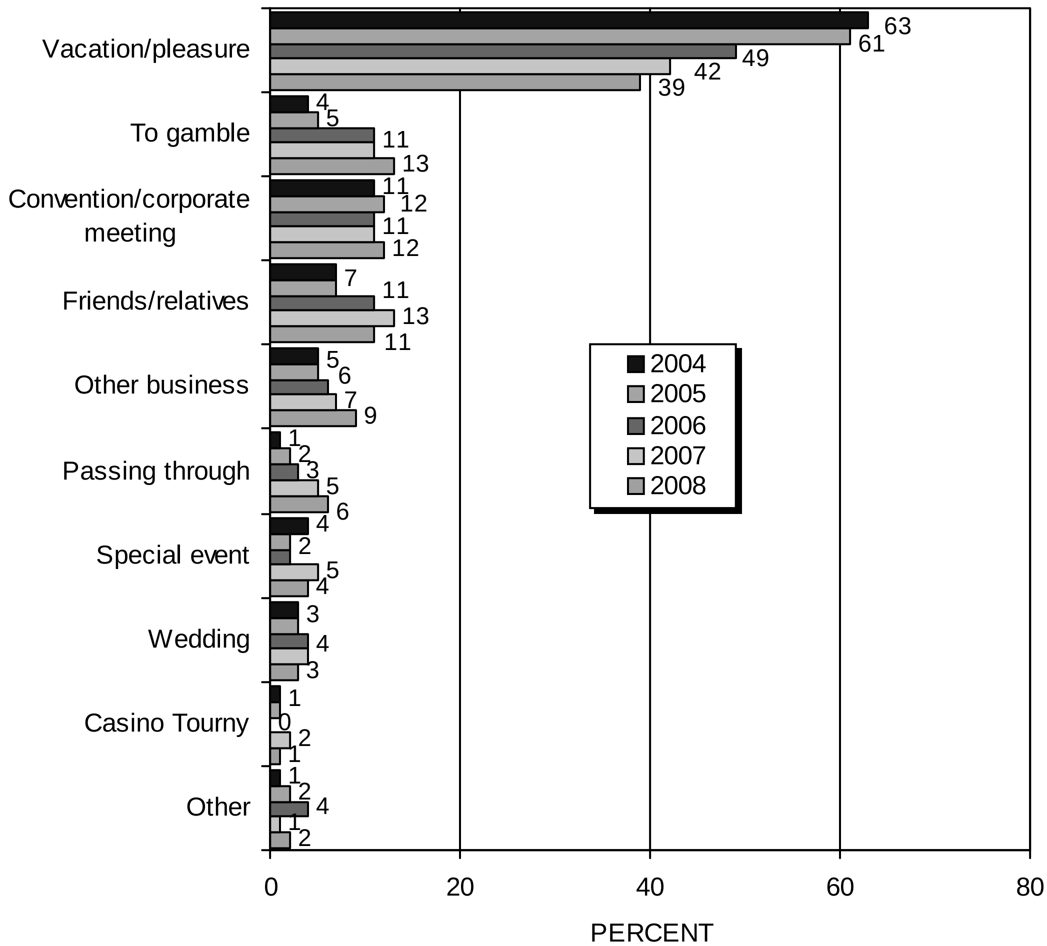
A*mong all visitors*, the average number of visits to Las Vegas in the past 12 months was 1.8, up from 1.7 in 2005 (Figure 4). Two-thirds (66%) of visitors reported visiting just once in the past year, down from 69% in 2004 and 2005.

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



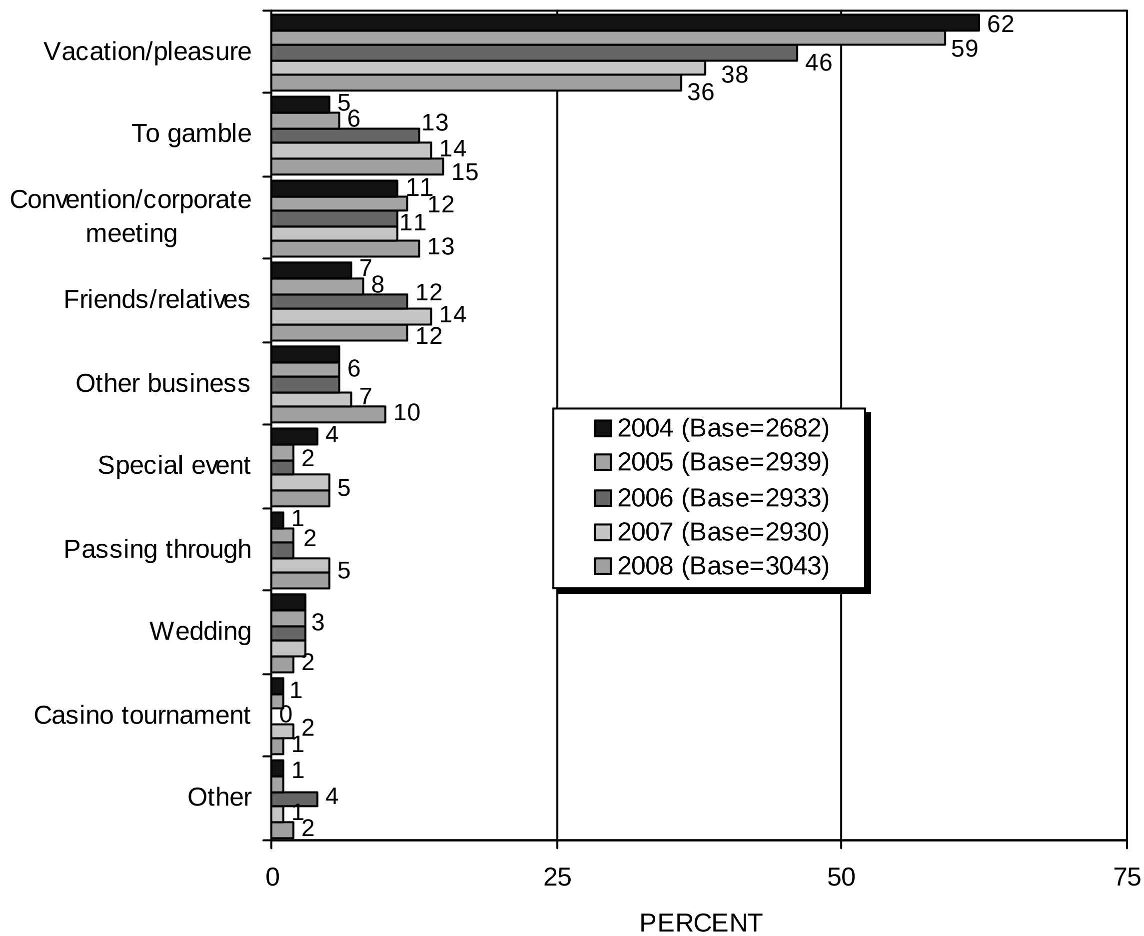
Among *repeat* visitors, the average number of visits to Las Vegas during the past year was 1.9, similar to past years (Figure 5).

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



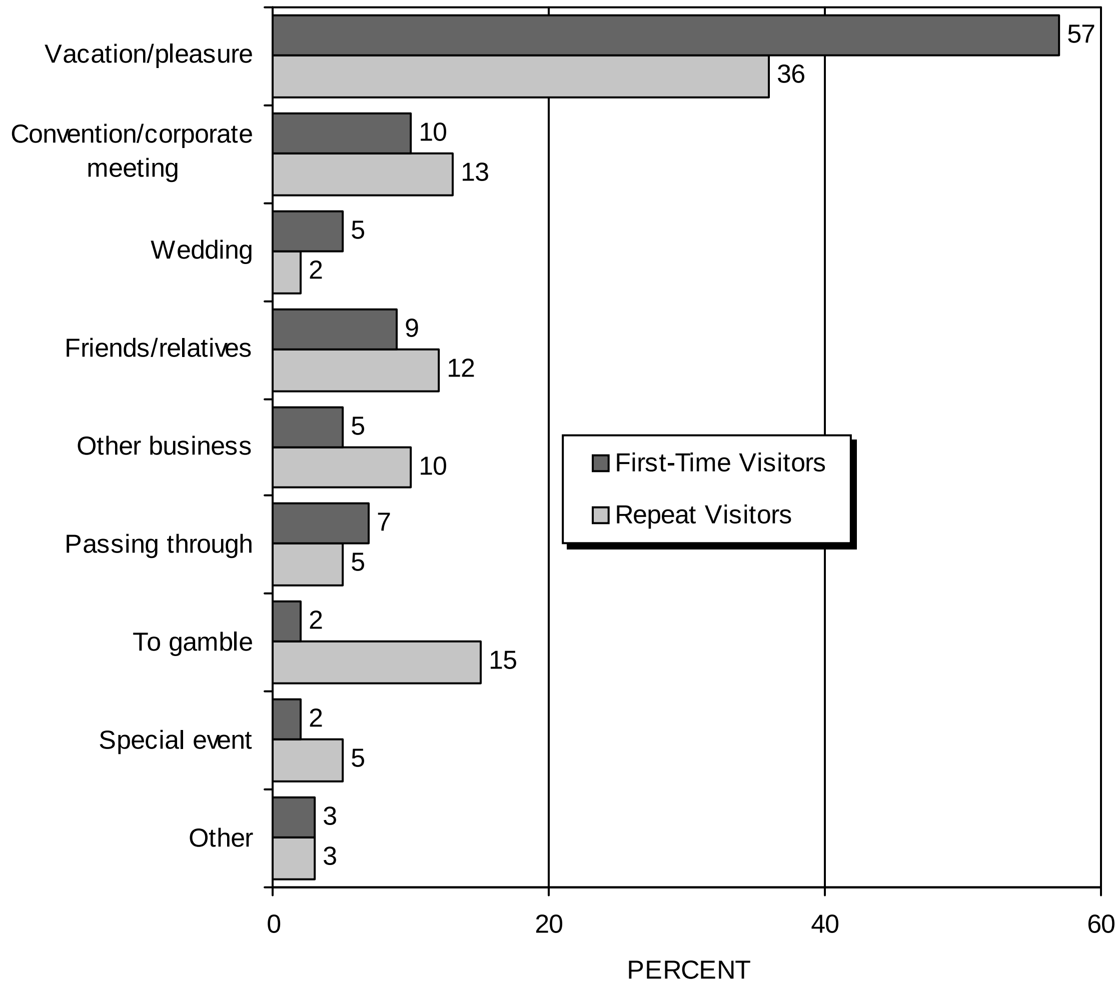
When asked about the primary purpose of their current visit to Las Vegas, 39% of all visitors mentioned vacation or pleasure, down significantly from 63% in 2004, 61% in 2005, and 49% in 2006 (Figure 6). Increases in two categories account for most of this drop: 13% said they were in Las Vegas to gamble (up significantly from the prior four years), and 11% were visiting friends or relatives (up significantly from 7% in both 2004 and 2005). Another twelve percent (12%) mentioned a convention, trade show, or corporate meeting, while 9% were in town on other business, up significantly from 5% in both 2004 and 2005, 6% in 2006, and 7% last year. Six percent (6%) said they were just passing through (up significantly from 2004 to 2006), and 4% said they were in town for a special event (up from 2% in both 2005 and 2006). Three percent (3%) came for a wedding (down significantly from 4% last year), and 1% came for a casino tournament.

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



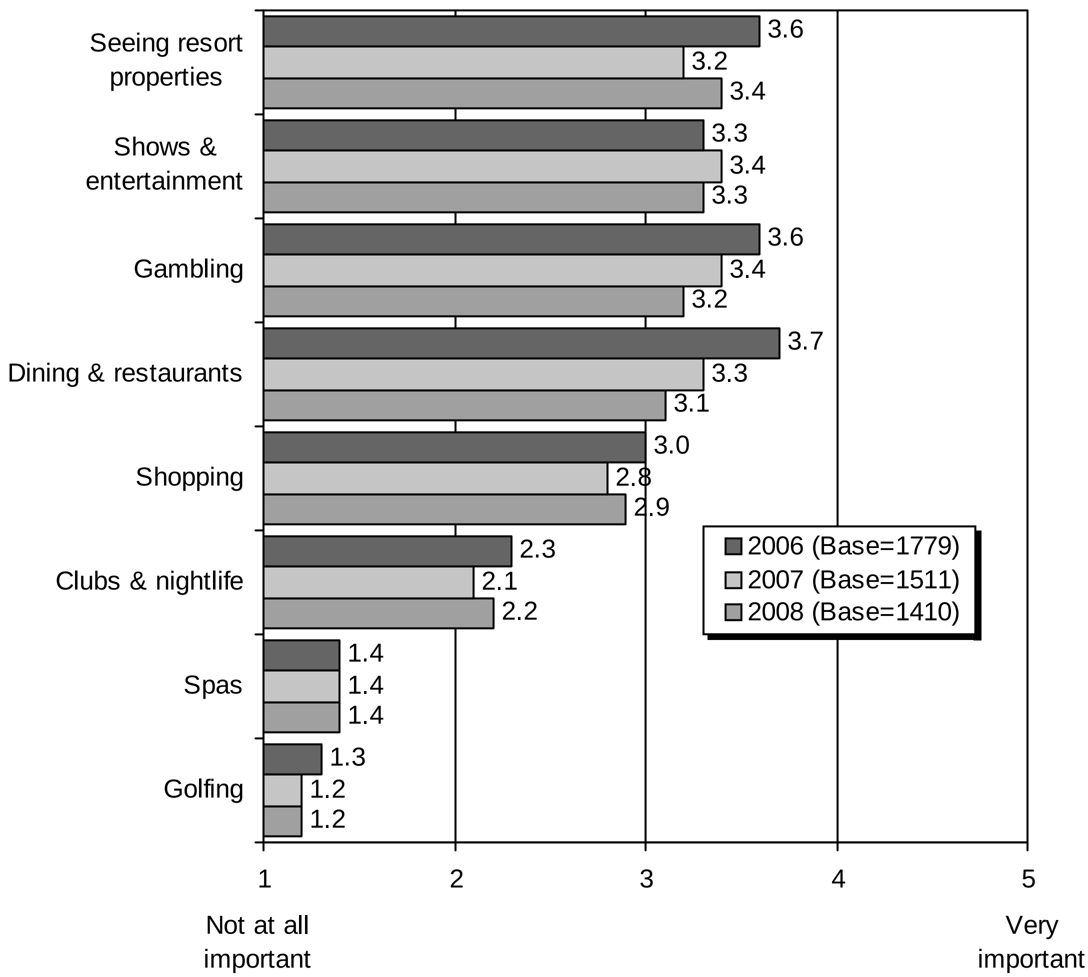
The proportion of *repeat visitors* who said the primary purpose of their current visit to Las Vegas was vacation or pleasure was 36%, down significantly from 62% in 2004, 59% in 2005, and 46% in 2006 (Figure 7). As with all visitors, increases in two categories account for much of this drop: 15% said they were in Las Vegas to gamble (up significantly from 2004 to 2006), and 12% were visiting friends or relatives (up significantly from 2004 and 2005). Another thirteen percent (13%) mentioned a convention, trade show, or corporate meeting, while 10% were in town on other business (up significantly from the past four years). Five percent (5%) of repeat visitors each said they were visiting for a special event (up from 2005 and 2006), or just passing through (up from 2004, 2005, and 2006). Two percent (2%) came for a wedding (down from 3% last year), and 1% came for a casino tournament.

FIGURE 8
Primary Purpose Of Current Visit
(First-Time Versus Repeat Visitors — 2008)



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 (57% vs. 36%) or to attend a wedding (5% vs. 2%). Repeat visitors were more likely than first-time visitors to say that their current trip to Las Vegas was for a convention or corporate meeting (13% vs. 10%), to visit friends or relatives (12% vs. 9%), or to gamble (15% vs. 2%).

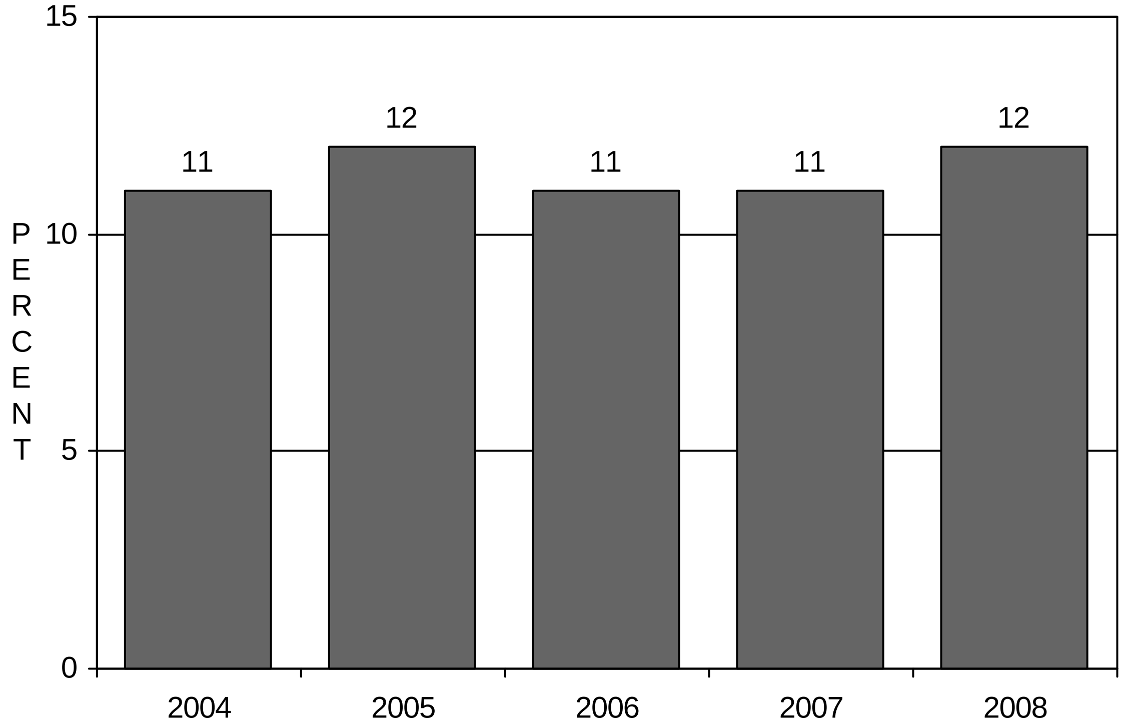
FIGURE 9
Importance Of Factors In Deciding To Visit Las Vegas
(Among Vacation/Pleasure Visitors)



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

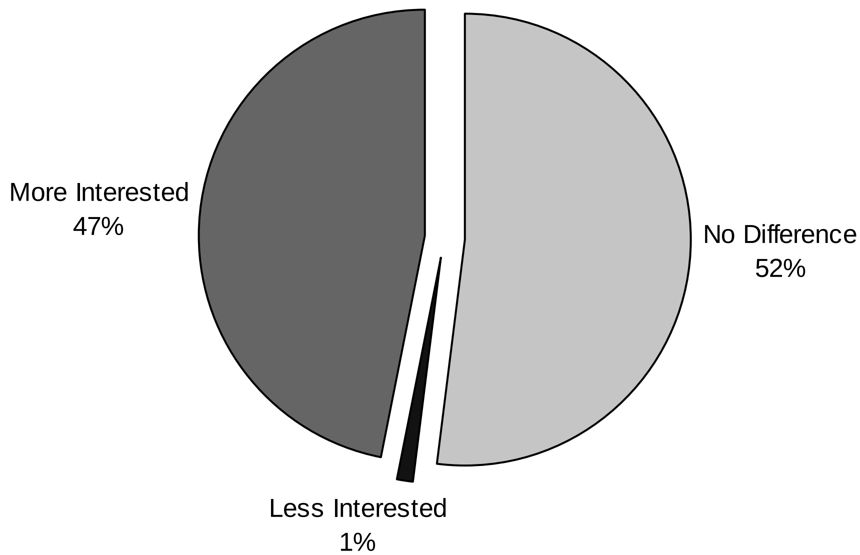
The most important factors were seeing the resorts (mean score of 3.4, up from 3.2 last year, but down from 3.6 in 2006), entertainment (3.3), gambling (3.2, down from 3.6 in 2006 and 3.4 last year), and restaurants (3.1, down significantly from 3.7 in 2006 and 3.3 last year), followed by shopping (2.9, down significantly from 3.0 in 2006). Of relatively less importance were nightlife (2.2), spas (1.4), and golfing (1.2).

FIGURE 10
Conventions/Trade Shows/Corporate Meetings



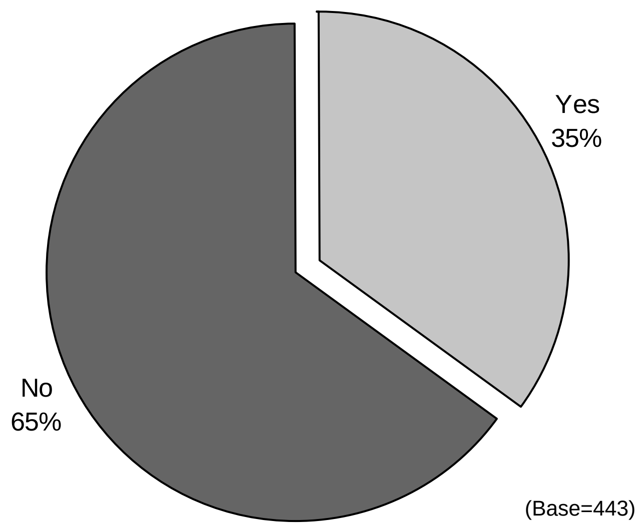
Visitors were asked if they had attended a convention, trade show, or corporate meeting while in Las Vegas (Figure 10). Twelve percent (12%) said they had, similar to past years.

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



Convention visitors were asked if holding a convention in Las Vegas made them more or less interested in attending the convention — or if it made no difference (Figure 11). In 2008 47% said having the convention in Las Vegas made them more interested in attending, 52% said it made no difference, and 1% said it them less interested in attending.

FIGURE 12
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-five percent (35%) of respondents said they had (Figure 12).

TRAVEL PLANNING

Travel planning varied broadly — from same-day planning to planning more than 90 days in advance. Nearly two-thirds (63%) of visitors in 2008 planned their trip to Las Vegas more than one month in advance (Figure 13), the same as last year, but an increase from 51% in 2004, 53% in 2005, and 56% in 2006.

FIGURE 13
Advance Travel Planning

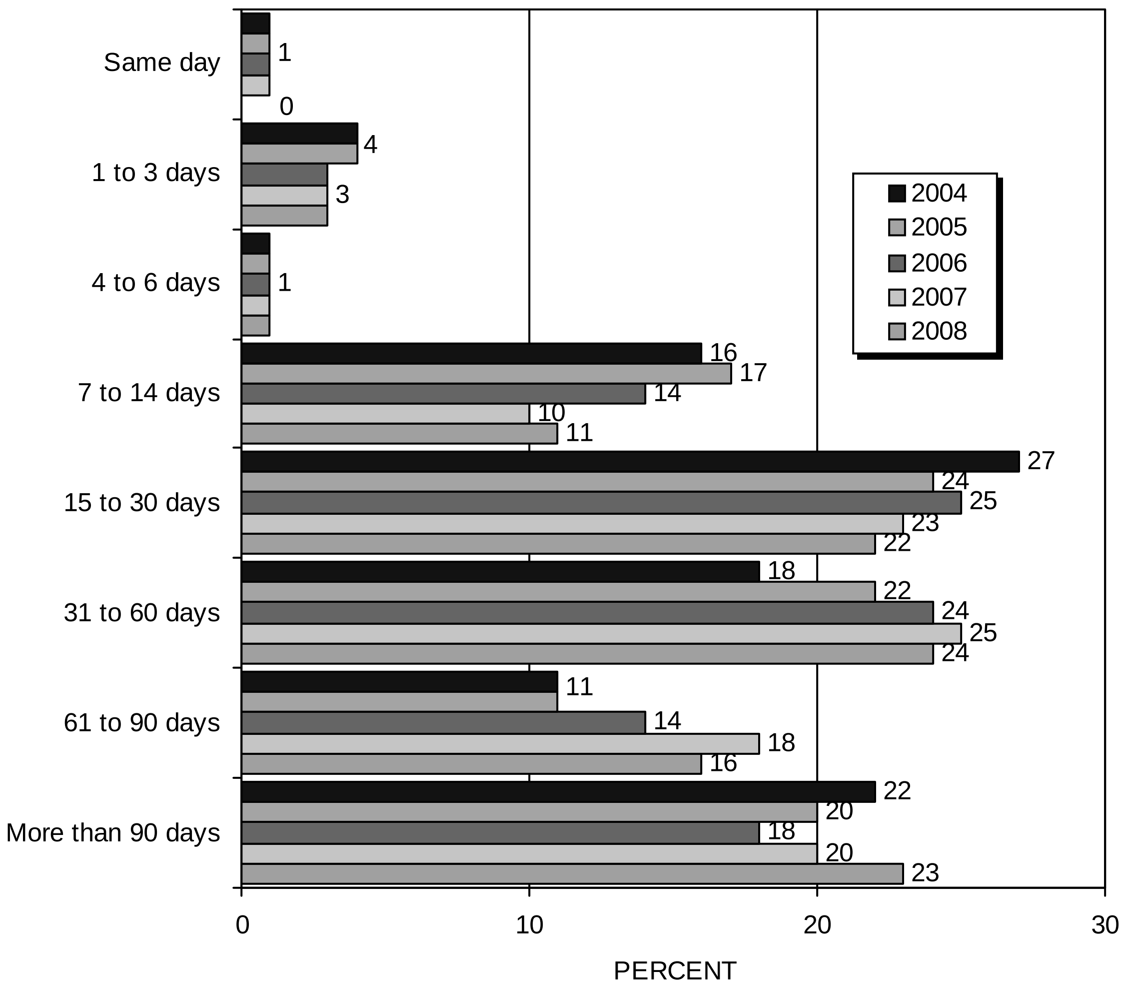
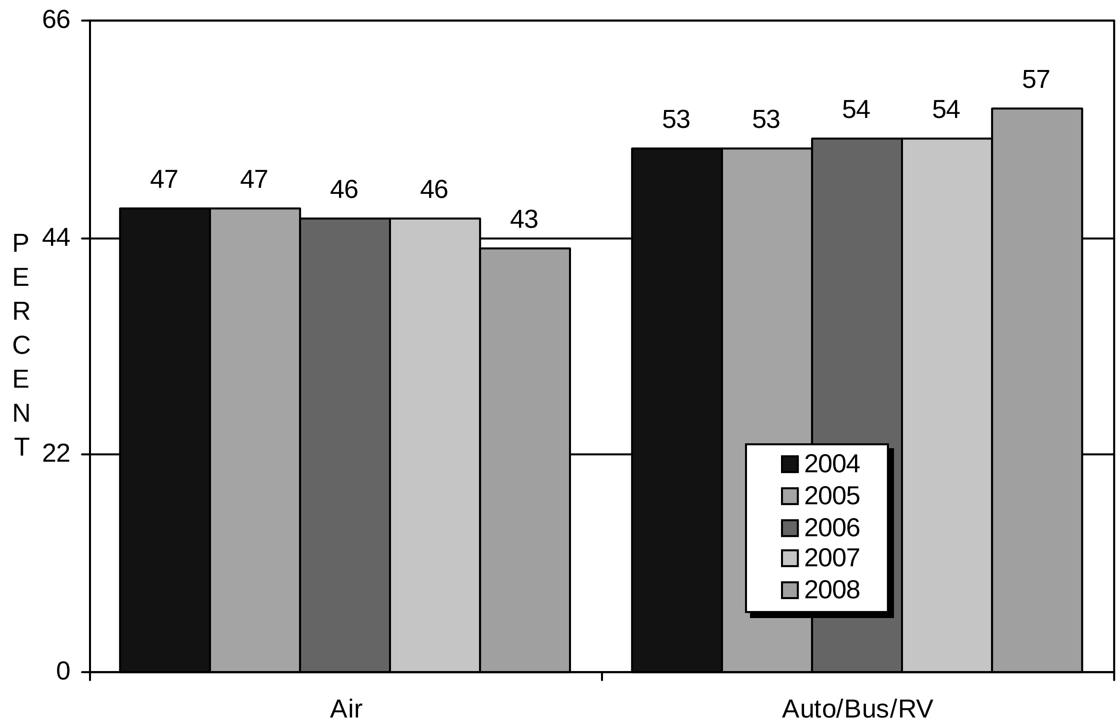
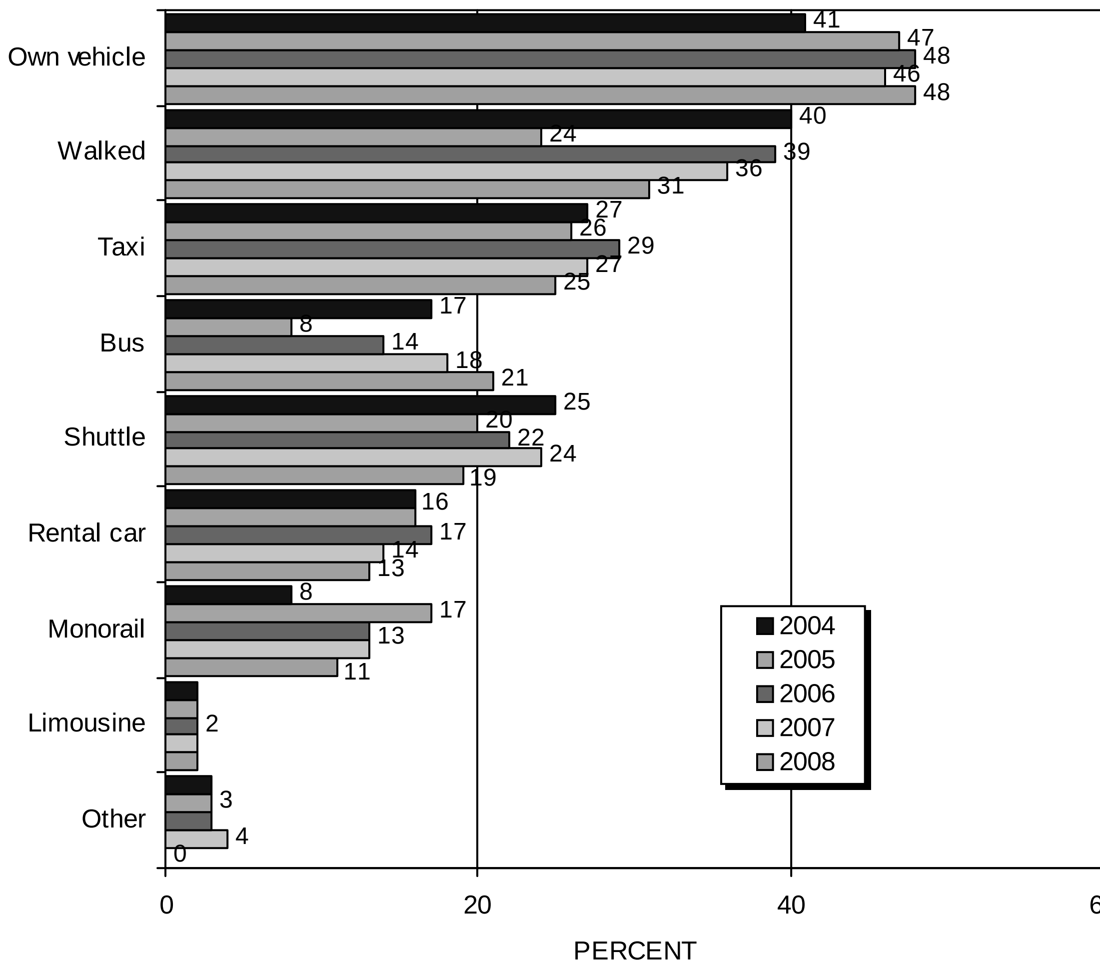


FIGURE 14
Transportation To Las Vegas



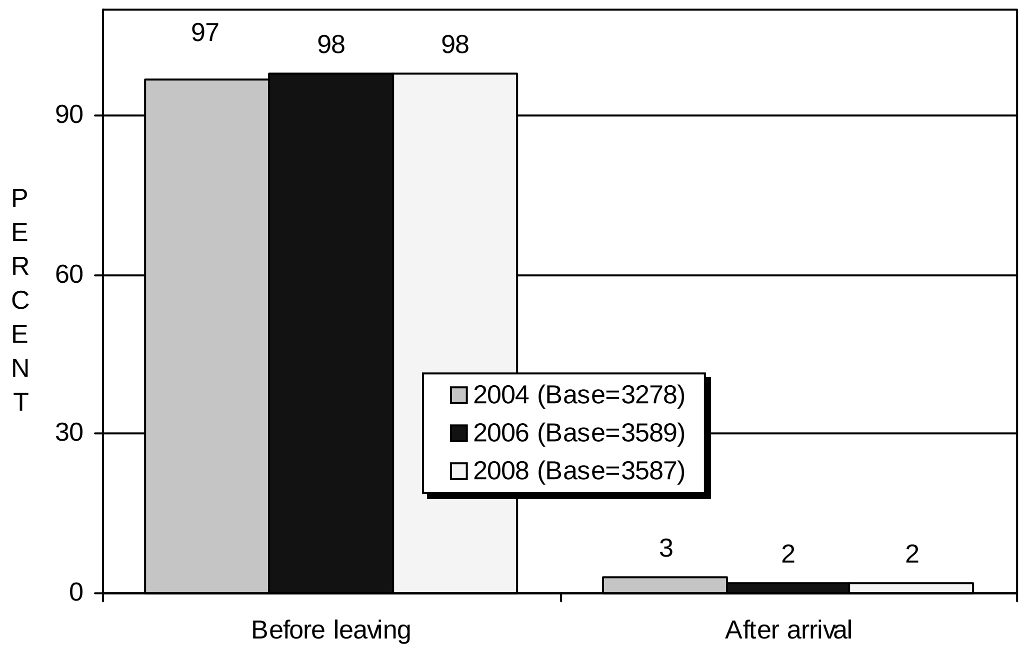
Forty-three percent (43%) of visitors to Las Vegas in 2008 arrived by air, down from 47% in both 2004 and 2005, and 46% in both 2006 and 2007, while 57% arrived by ground transportation, up from 53% in both 2004 and 2005, and 54% in both 2006 and 2007 (Figure 14).

FIGURE 15
Local Transportation



Forty-eight percent (48%) of visitors said that they used their own vehicle when traveling around Las Vegas, a significant increase over 41% in 2004 (Figure 15). Thirty-one percent (31%) of visitors volunteered that they walked while in Las Vegas, up from 24% in 2005. Twenty-five percent (25%) of visitors reported taking a taxi (down significantly from 29% in 2006), while 21% reported taking a bus (up from the past four years), 19% reported using a hotel shuttle (down from 25% in 2004, 22% in 2006, and 24% last year), and 13% used a rental car (down from 16% each in 2004 and 2005, and 17% in 2006). Monorail use (11%) is down significantly from a high of 17% in 2005, and 13% in both 2006 and 2007.

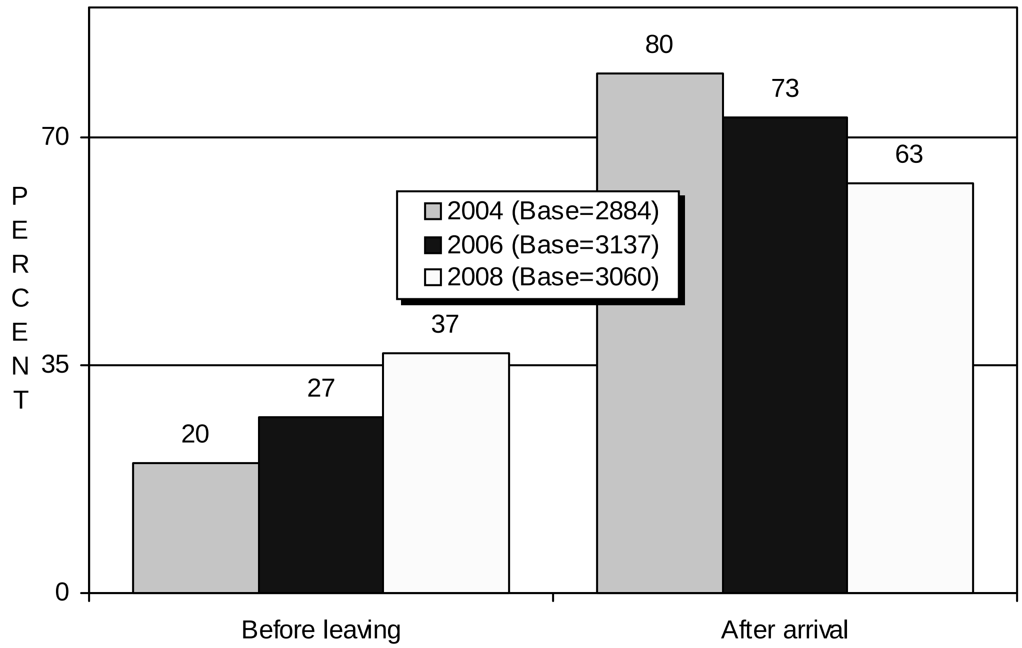
FIGURE 16
When Decided Where To Stay*
(Among Those Who Stayed Overnight – Asked Every Other Year)



Most visitors (98%) decided where to stay before leaving home, consistent with 2004 and 2006 (Figure 16).

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

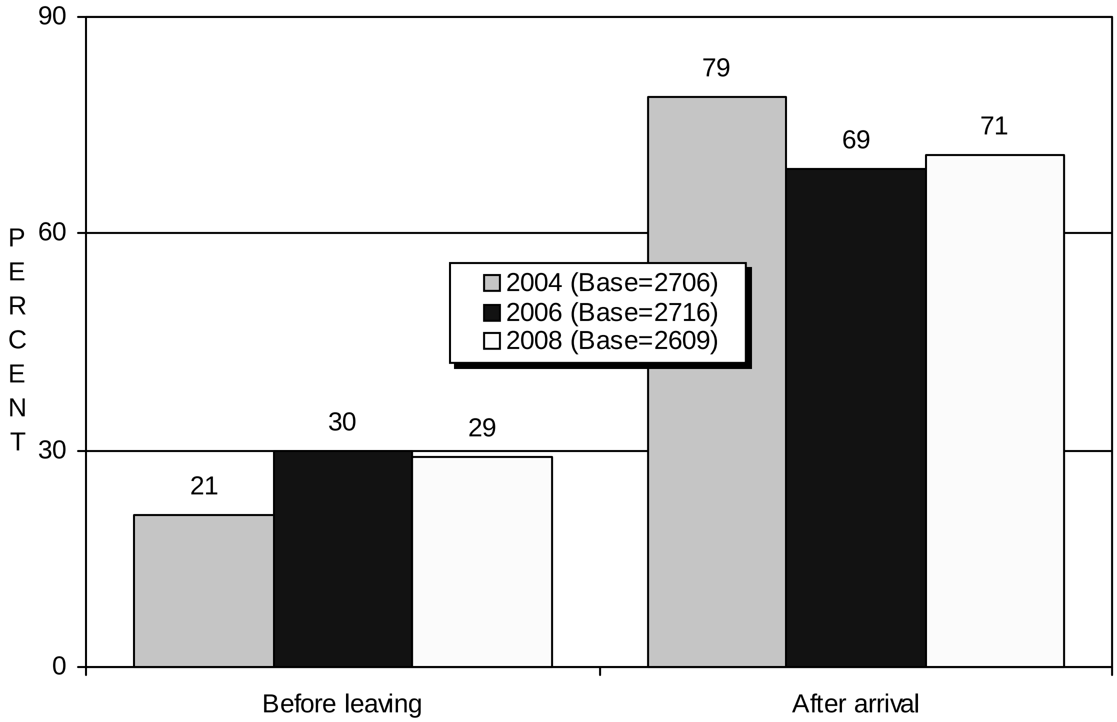
FIGURE 17
When Decided Where To Gamble*
(Among Those Who Gambled – Asked Every Other Year)



Most visitors (63%) decided where to gamble after arriving in Las Vegas, down significantly from 80% in 2004 and 73% in 2006 (Figure 17). By contrast, 37% of visitors decided where to gamble before leaving home, up from 20% in 2004 and 27% in 2006.

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

FIGURE 18
When Decided Which Shows To See*
(Among Those Who Saw Shows – Asked Every Other Year)



While most visitors (71%) decided which shows to see after arrival (down from 79% in 2004), nearly three in ten (29%) decided before leaving home (up significantly from 21% in 2004) (Figure 18).

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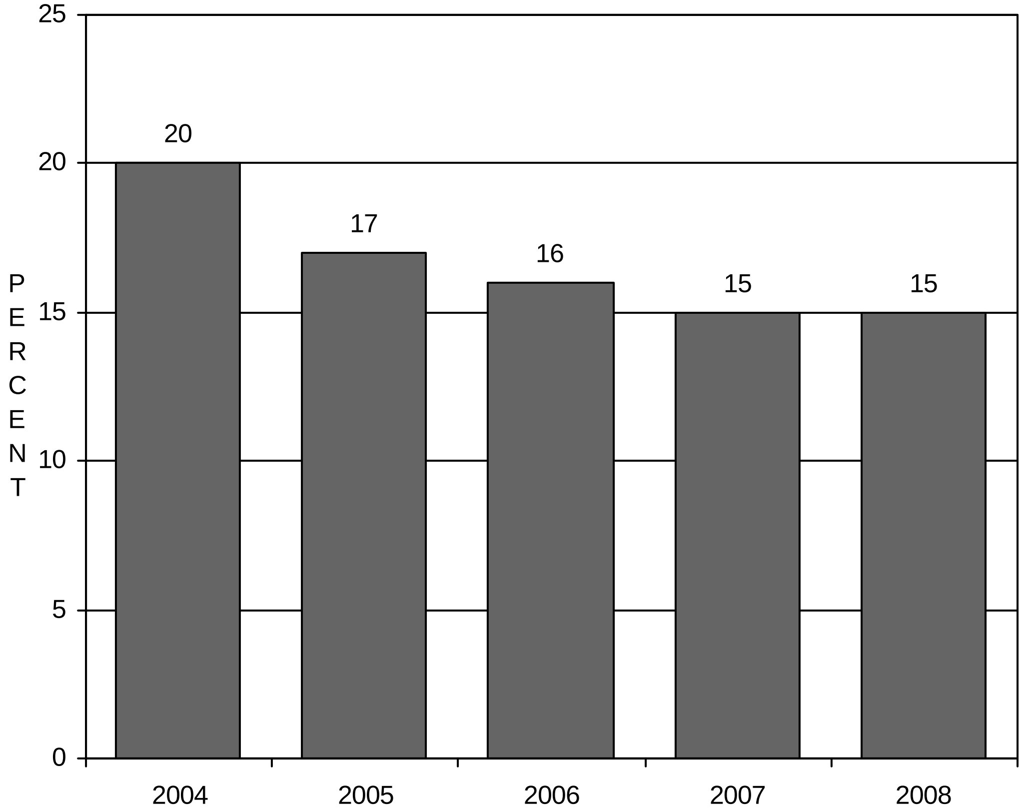
* This question is asked every other year and was not asked in 2005 or 2007.

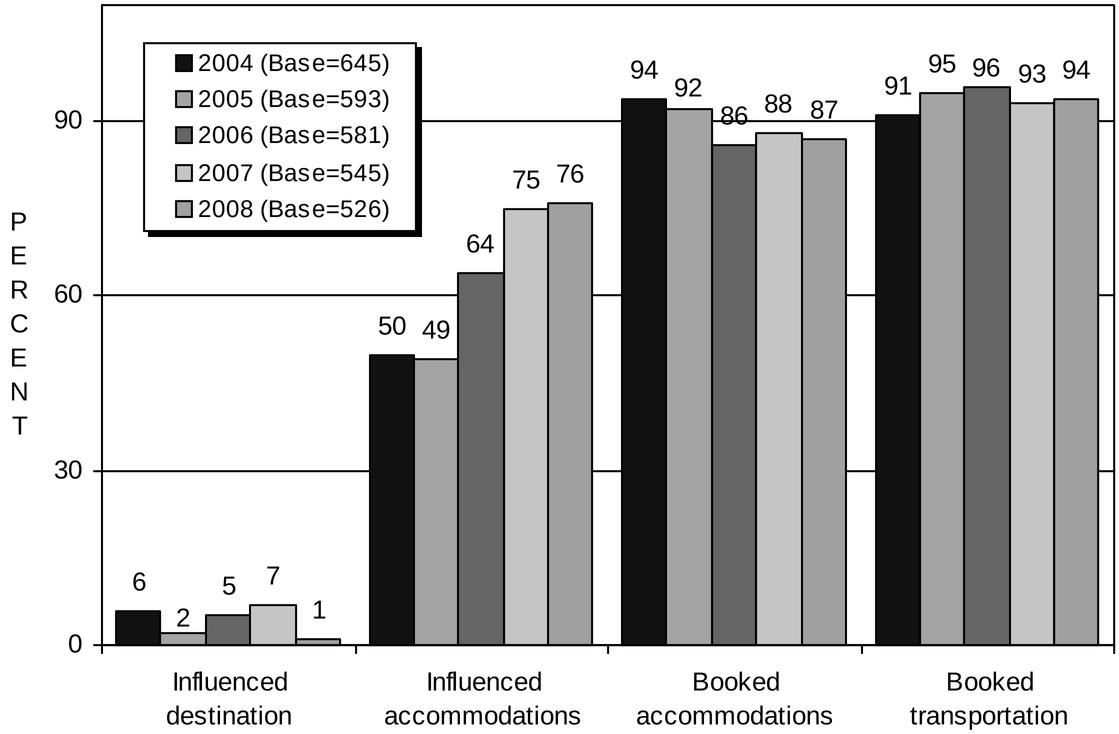
FIGURE 19
Travel Agent Assistance*



The proportion of visitors who reported using a travel agent to plan their trip to Las Vegas (15%) was the same as last year but down significantly from 20% in 2004 (Figure 19).

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

FIGURE 20
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 20), 87% said the travel agent booked their accommodations (down significantly from 94% in 2004 and 92% in 2005), while 94% said the travel agent booked their transportation (up significantly from 91% in 2004).

Three-quarters of visitors (76%) said their travel agent influenced their choice of accommodations, similar to last year, but up significantly from 50% in 2004, 49% in 2005, and 64% in 2006.

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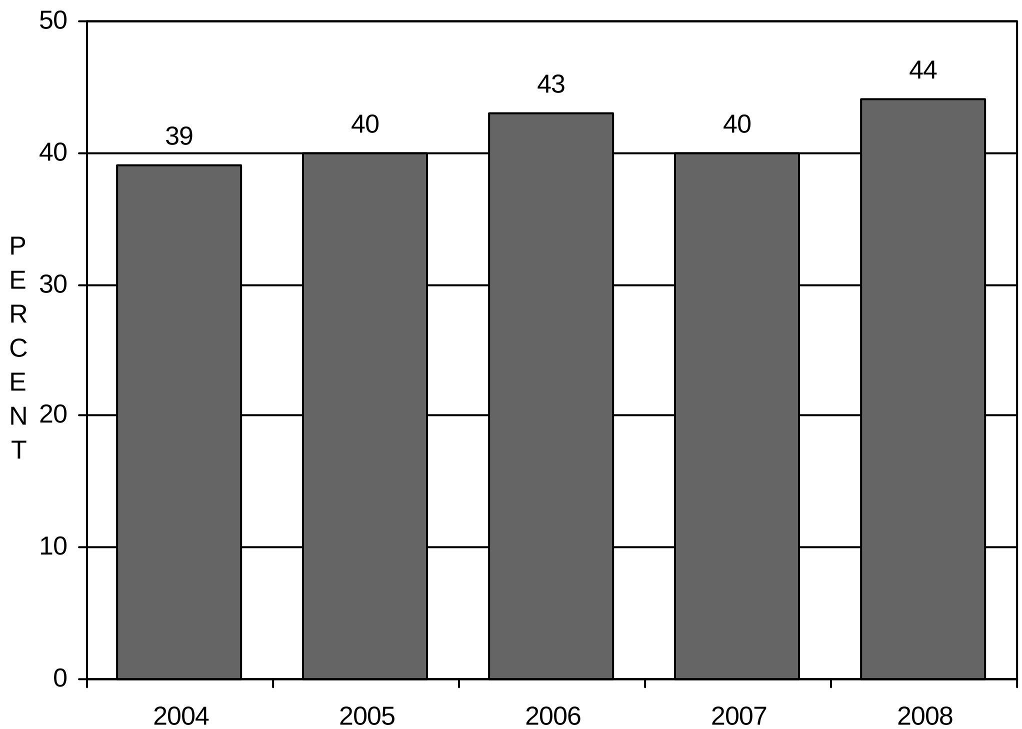
* Only "yes" responses are reported in this chart.

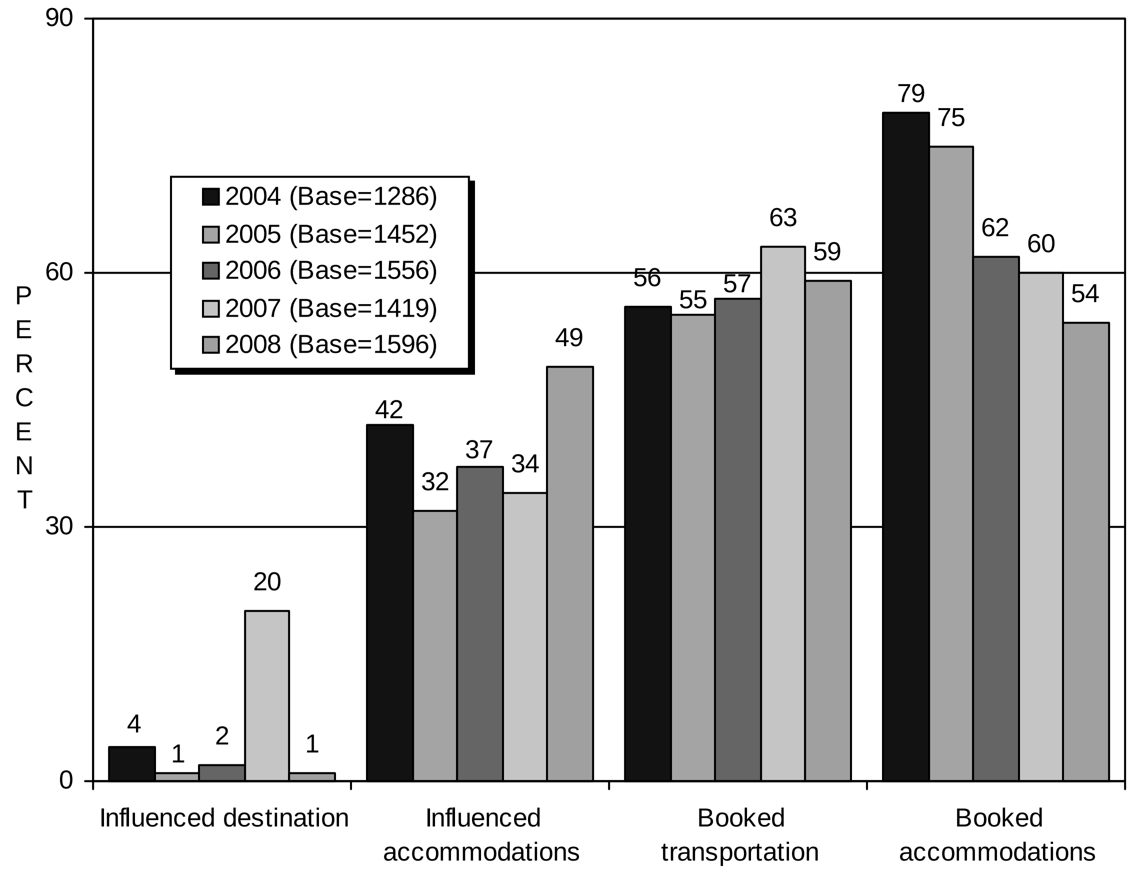
FIGURE 21
Whether Used The Internet To Plan Trip*



Visitors were asked if they used the Internet to plan their trip, and 44% said yes, up significantly from 39% in 2004 and 40% in both 2005 and 2007 (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)



Almost six in ten visitors (59%) who used the Internet to plan their trip to Las Vegas said they booked their transportation online, down significantly from 63% last year (Figure 22). Fifty-four percent (54%) said they booked their accommodations online, down significantly from past years. The proportion of visitors who said the Internet influenced their choice of accommodations was 49%, up significantly from past years.

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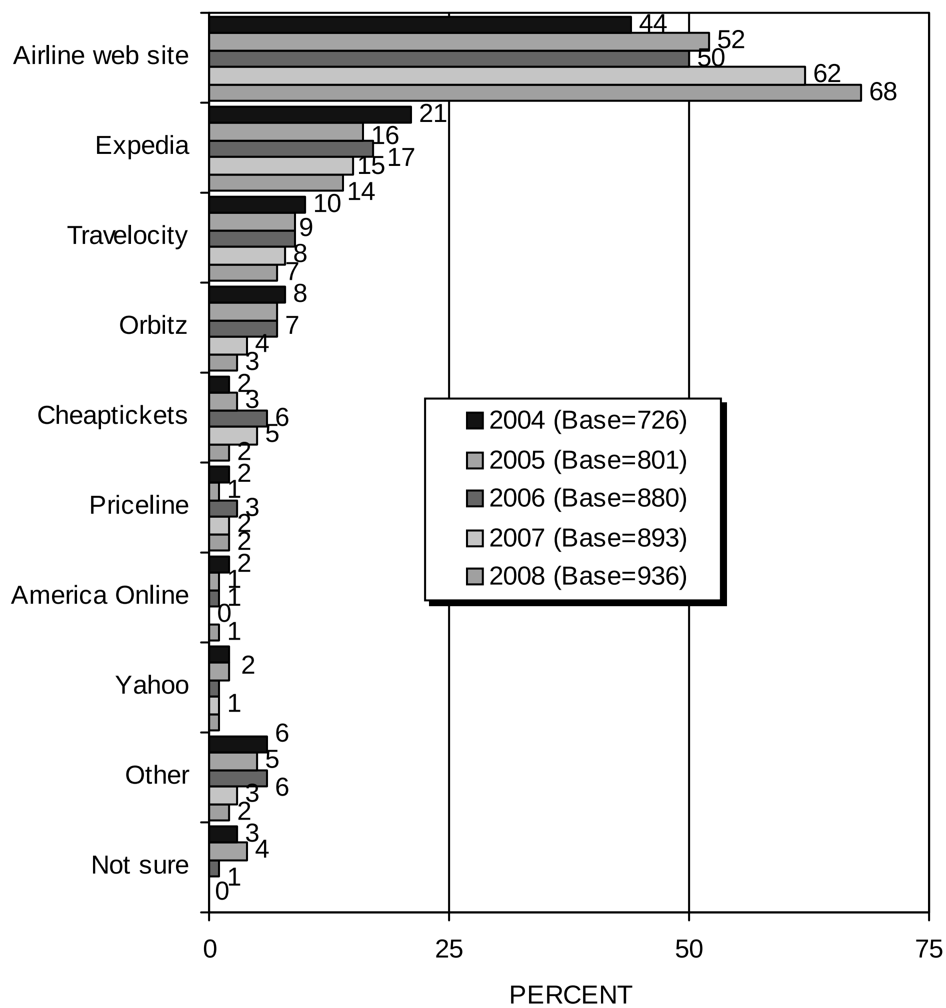
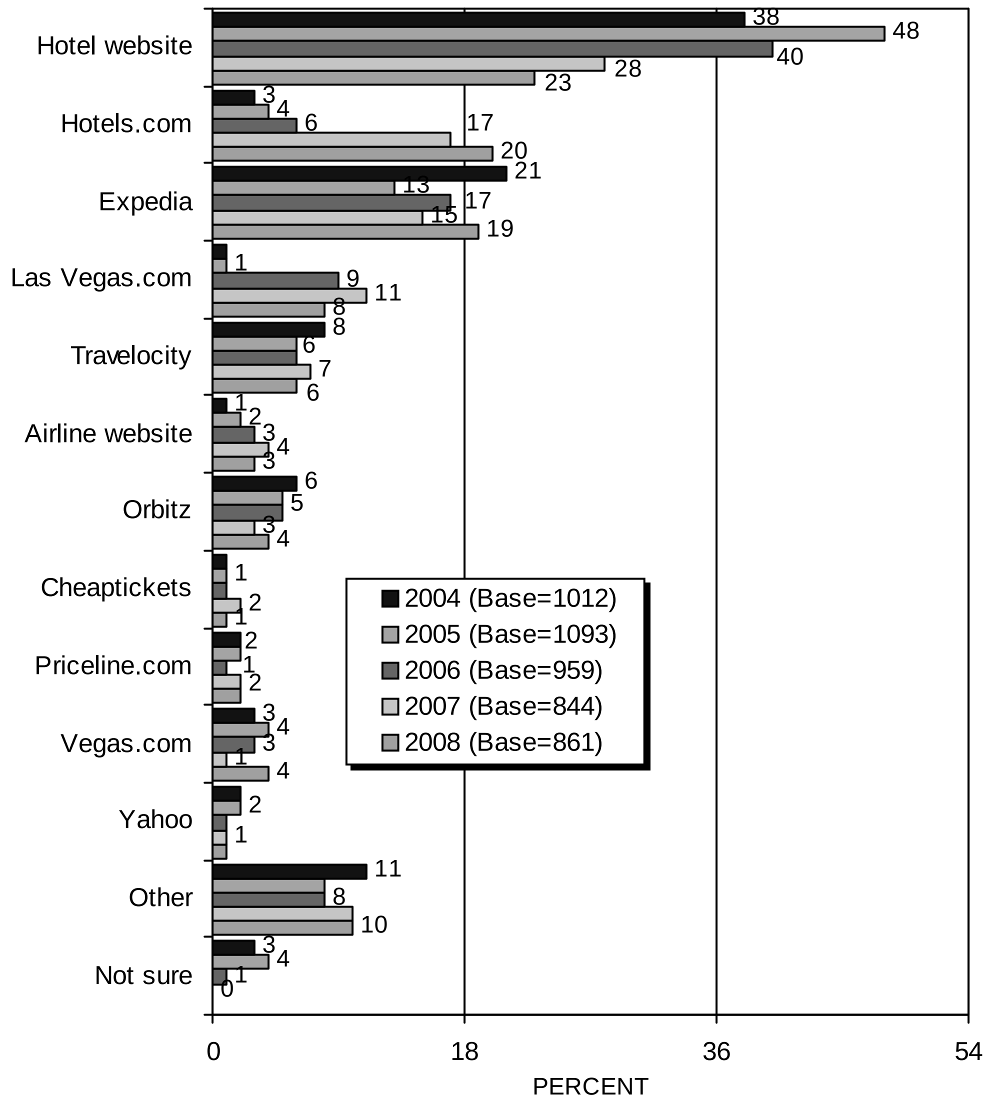
* Only "yes" responses are reported in this chart.

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



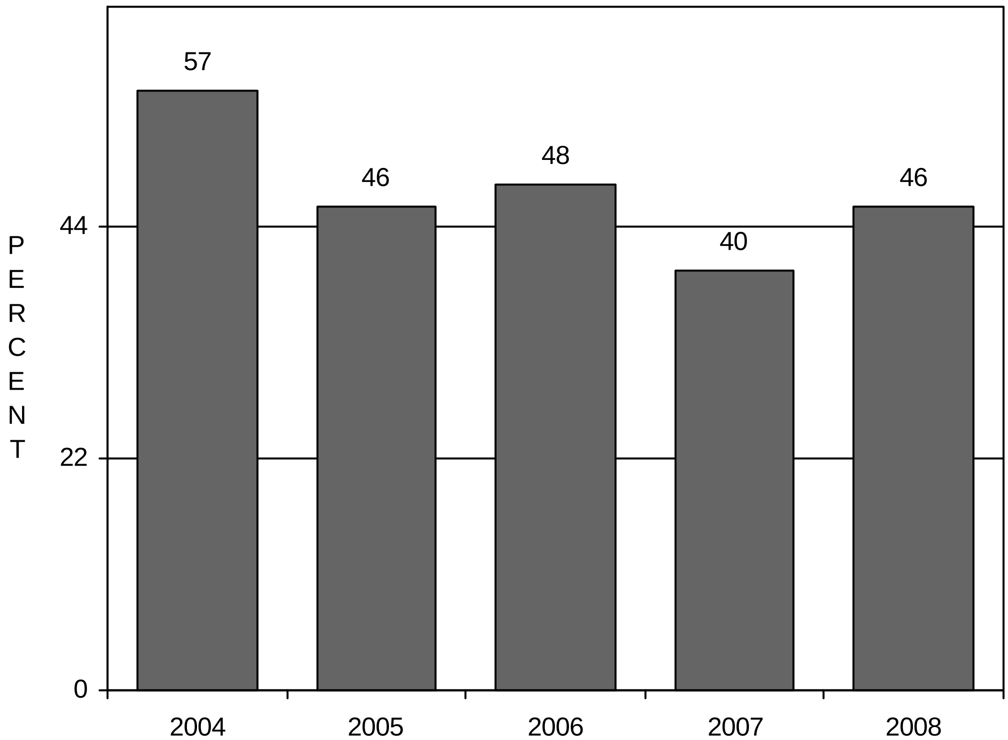
Among those who booked their transportation to Las Vegas online, two in three (68%) said they used an airline website, up significantly from all prior years (Figure 23). Fourteen percent (14%) said they used Expedia, down significantly from 21% in 2004. Seven percent (7%) used Travelocity, 3% said Orbitz, 2% said Cheaptickets, and 2% said Priceline. Other websites were mentioned by 2% or fewer.

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, 23% said they used a hotel website, down from past years (Figure 24). Twenty percent (20%) said they used Hotels.com, up from 3% in 2004, 4,% in 2005, and 6% in 2006. Nineteen percent (19%) used Expedia, up from 13% in 2005 and 15% in 2007. Six percent (6%) used Travelocity, 4% used Orbitz, while the remaining visitors used a variety of other websites.

FIGURE 25
Whether Visited Downtown Las Vegas*



Forty six percent (46%) of visitors said they had visited Downtown Las Vegas on their current trip, down significantly from 57% in 2004, but up significantly from 40% last year (Figure 25).

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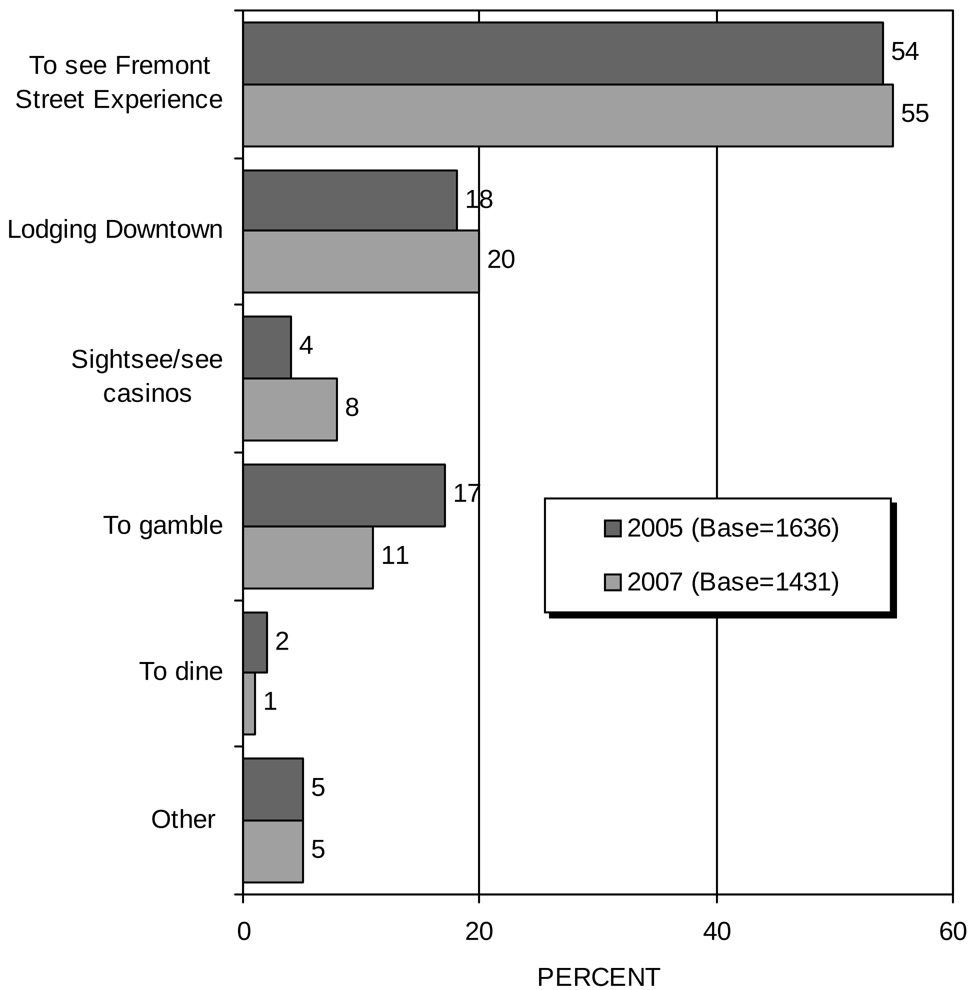
* Only "yes" responses are reported in this chart.

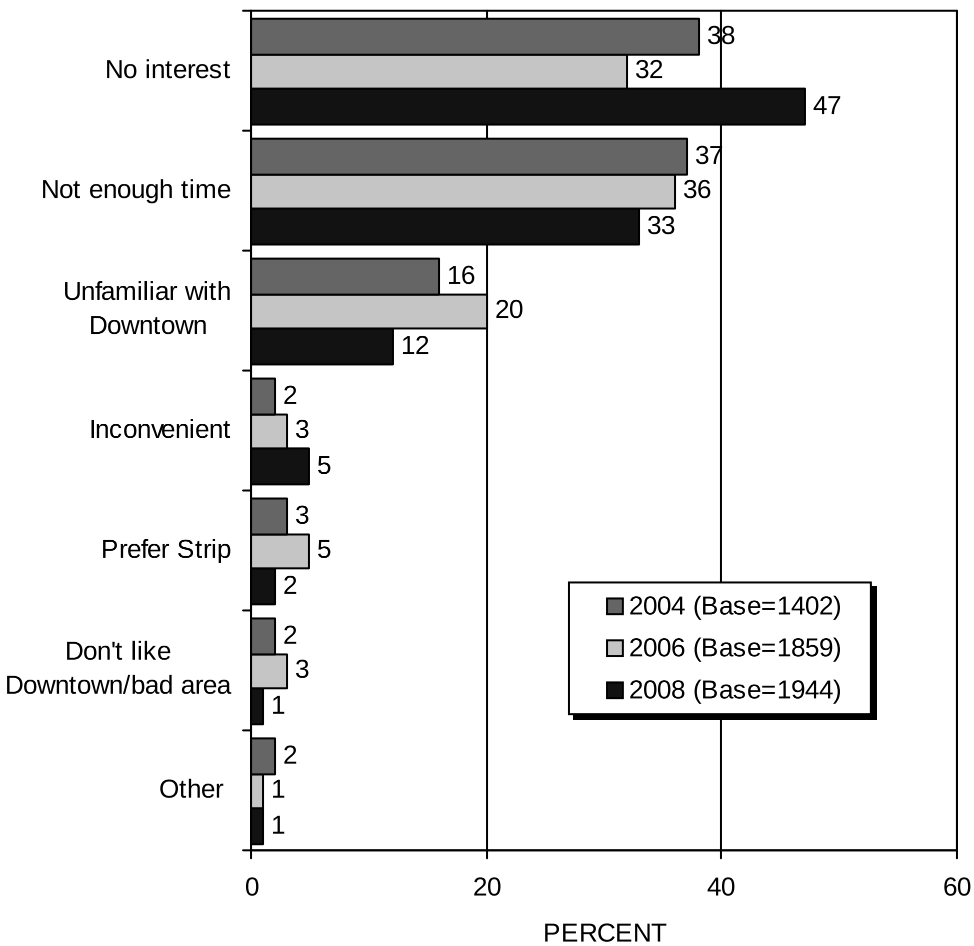
FIGURE 26
Main Reason For Visiting Downtown Las Vegas*
(Among Those Who Visited Downtown — Asked Every Other Year)



Visitors who visited Downtown Las Vegas on their current trip were asked the primary reason why they had done so (Figure 26). More than one-half (55%) said it was to see the Fremont Street Experience, similar to past years. One in five visitors (20%) said they were lodging Downtown, and 11% said they went Downtown primarily to gamble, down significantly from 17% in 2005. The number who said they visited Downtown primarily to sightsee was 8%, up significantly from 4% in 2005.

* This question is asked every other year and was not asked in 2004, 2006, or 2008.

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). Nearly one-half (47%) said they were not interested in Downtown (an increase from 38% in 2004 and 32% in 2006). One in three (33%) said it was because they did not have enough time (down from 37% in 2004), while 12% said they were unfamiliar with Downtown, a decrease from 16% in 2004 and 20% in 2006. Five percent (5%) of visitors said they did not go Downtown because it was inconvenient, and 2% said they prefer the Strip area, a decrease from 3% in 2004 and 5% in 2006.

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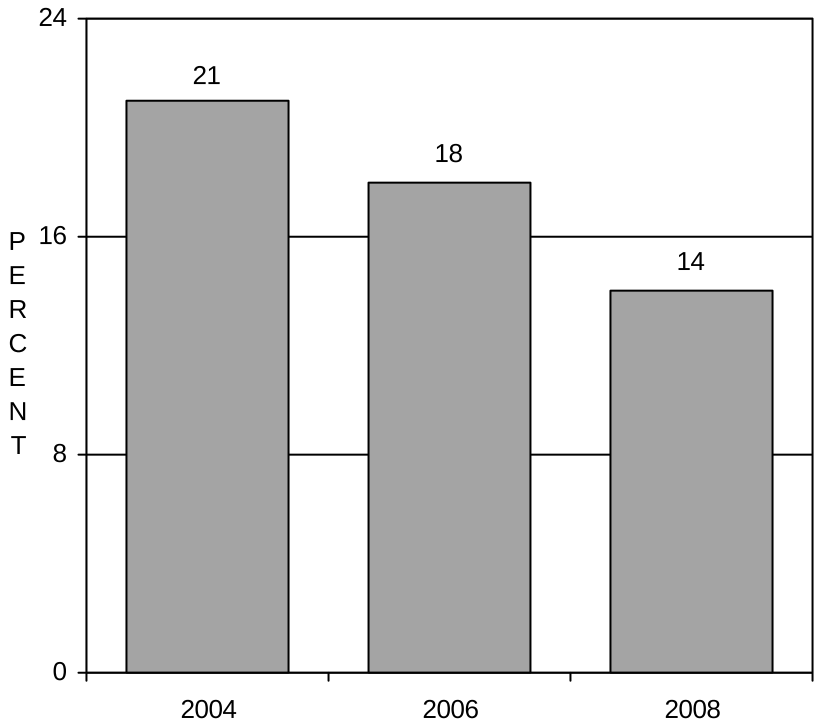
* This question is asked every other year and was not asked in 2005 or 2007.

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

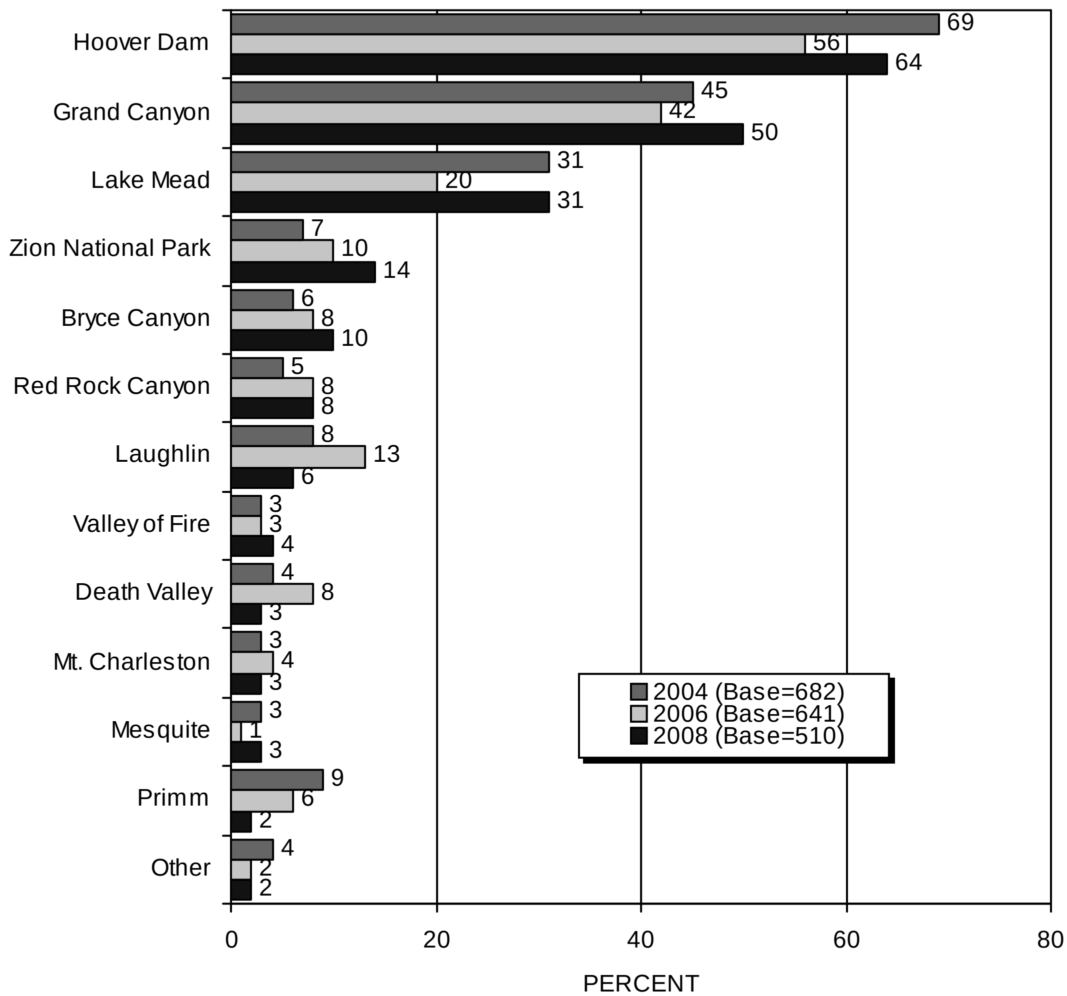


Visitors were asked if they visited any nearby places before or after their trip to Las Vegas (Figure 28). Fourteen percent (14%) of visitors said they had, down significantly from 21% in 2004 and 18% in 2006.

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

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

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). Visitors were more likely in 2008 than 2006 to say they visited Hoover Dam (64% vs. 56%), the Grand Canyon (50% vs. 42%), and Lake Mead (31% vs. 20%) – but they were less likely than 2006 visitors to say they visited Laughlin (6% vs. 13%), Death Valley (3% vs. 8%), and Primm (2% vs. 6%).

---

* Multiple responses were permitted.

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

TRIP CHARACTERISTICS AND EXPENDITURES

As in past years, the majority of visitors (68%) traveled in parties of two (Figure 30). Seven percent (7%) said they were in a party of three, while 10% were in a party of four, and 4% were in a party of five or more. Eleven percent (11%) of visitors traveled alone, up from 8% in both 2006 and 2007. The average party size in 2008 was 2.4 persons, down significantly from all prior years.

FIGURE 30
Adults In Immediate Party

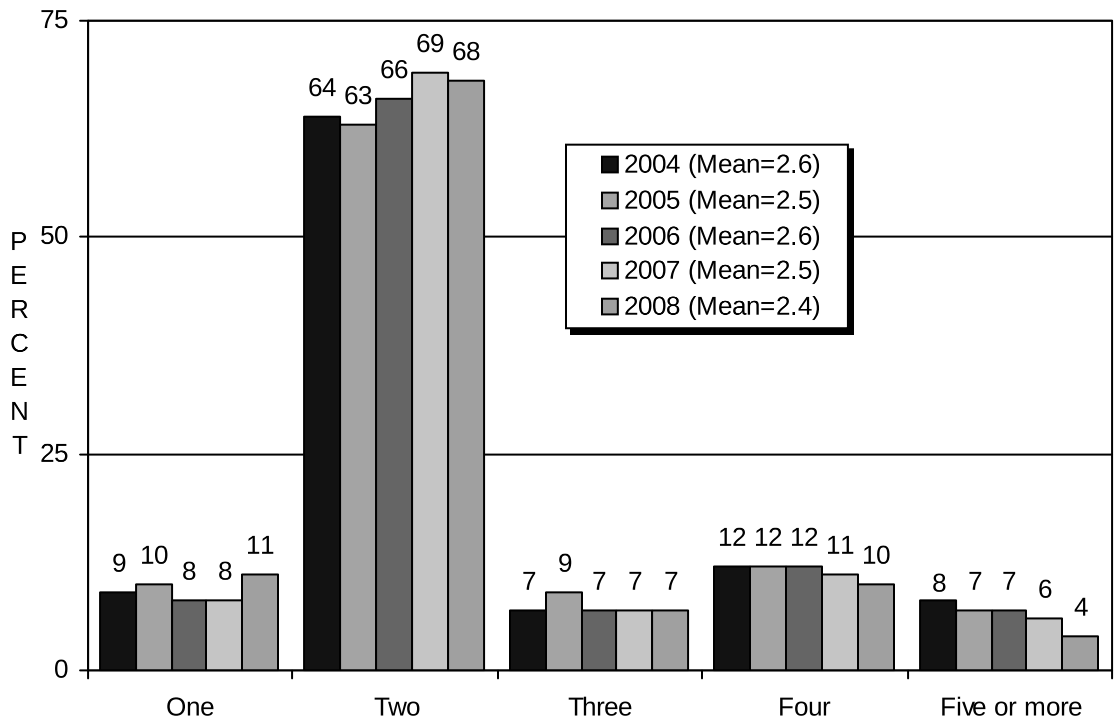
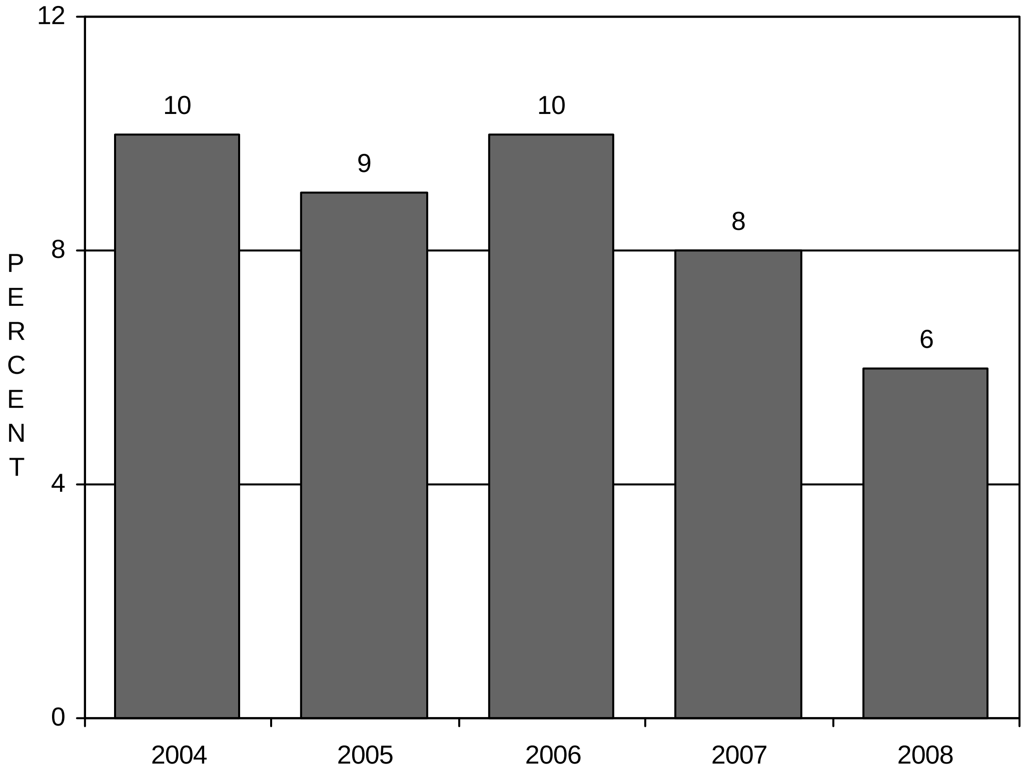


FIGURE 31
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 31). Six percent (6%) said they did, down significantly from 10% in both 2004 and 2006 and 9% in 2005.

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

FIGURE 32
Nights Stayed

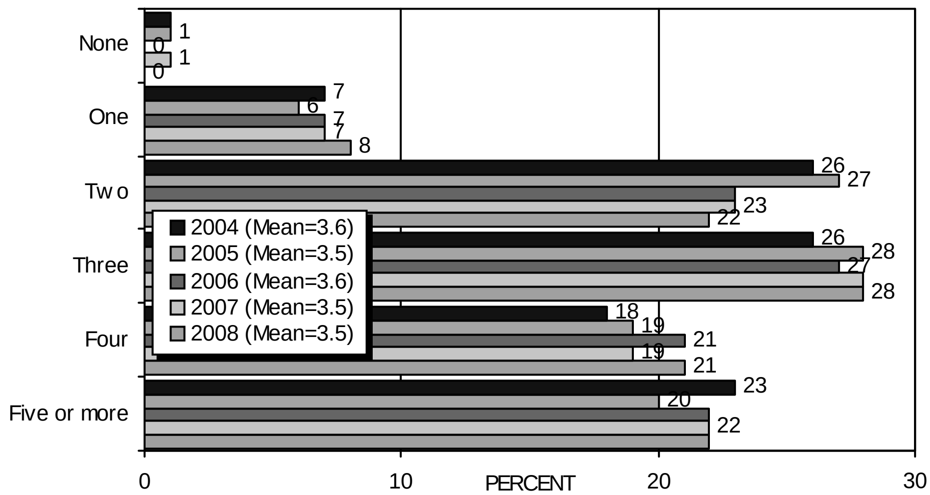
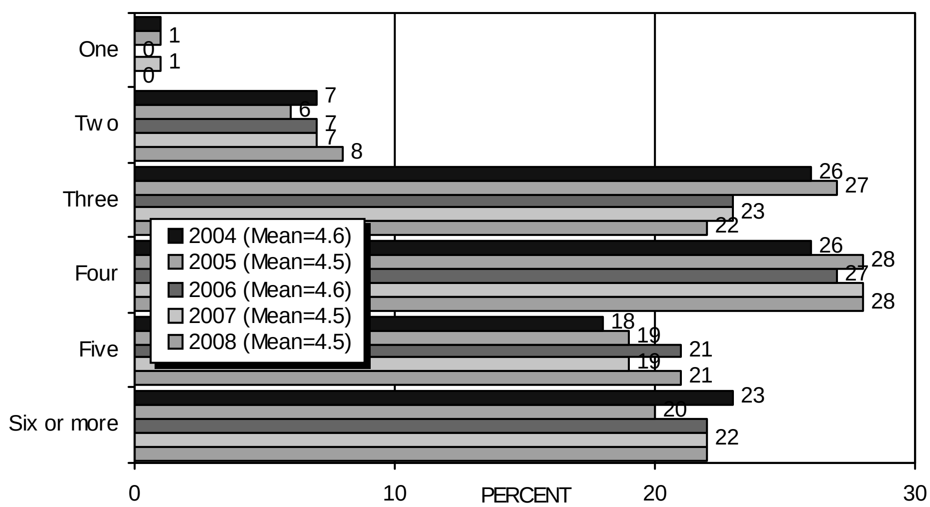
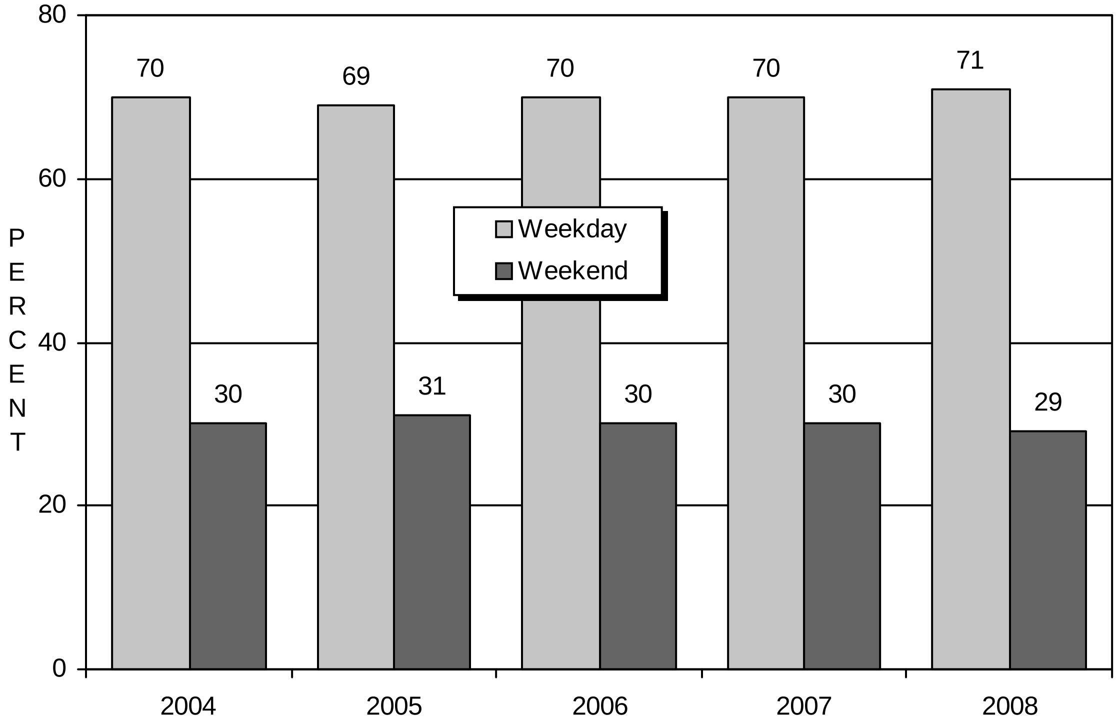


FIGURE 33
Days Stayed



In 2008, visitors stayed an average of 3.5 nights and 4.5 days in Las Vegas -— consistent with past averages (Figures 32 and 33).

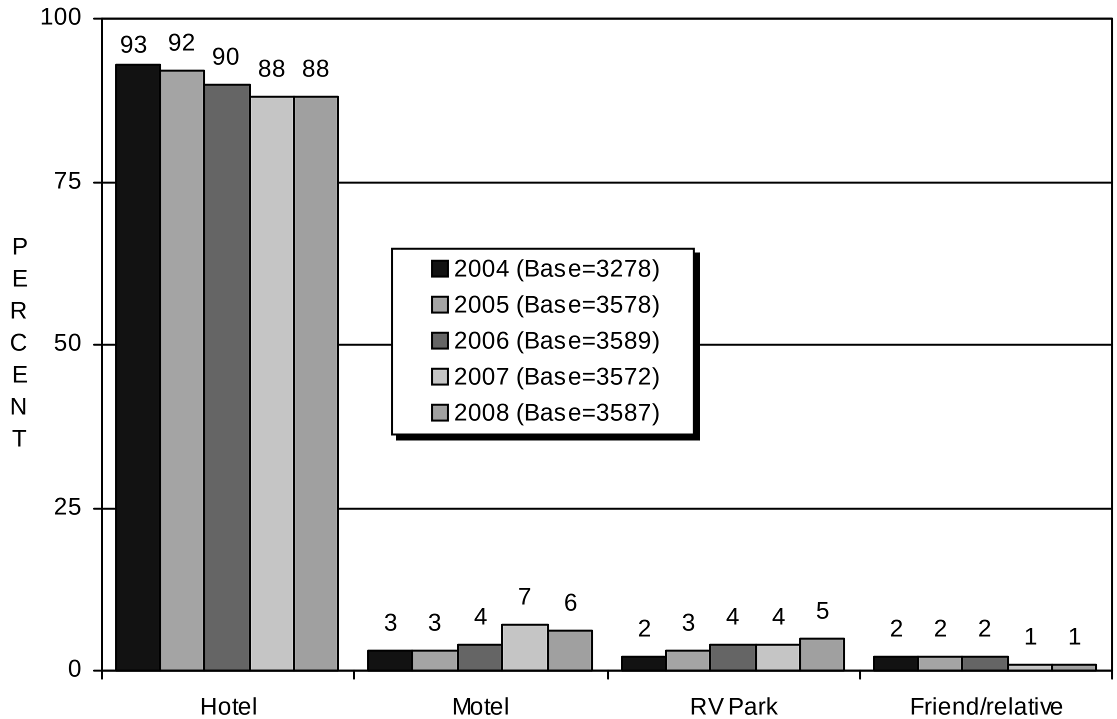
FIGURE 34
Weekend Versus Weekday Arrival*



As in the past, about three in ten (29%) visitors arrived in Las Vegas on a weekend, while about seven in ten (71%) arrived on a weekday (Figure 34).

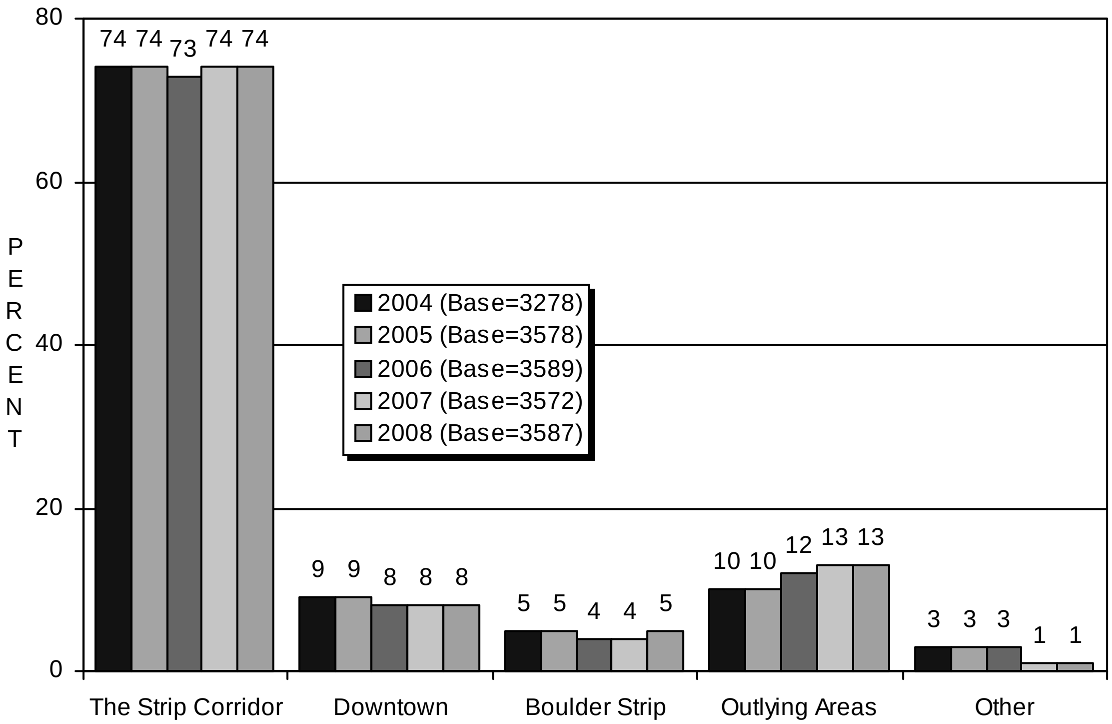
* *Weekday* is defined as Sunday through Thursday. *Weekend* is defined as Friday and Saturday.

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



Among visitors who stayed in Las Vegas overnight, 88% stayed in a hotel (down from 93% in 2004 and 92% in 2005), while 6% stayed in a motel (up from 3% in both 2004 and 2005 and 4% in 2006). Five percent (5%) stayed in an RV park (up from 2% in 2004 and 3% in 2005), and 1% stayed with friends or relatives (down from 2% in 2004 through 2006) (Figure 35).

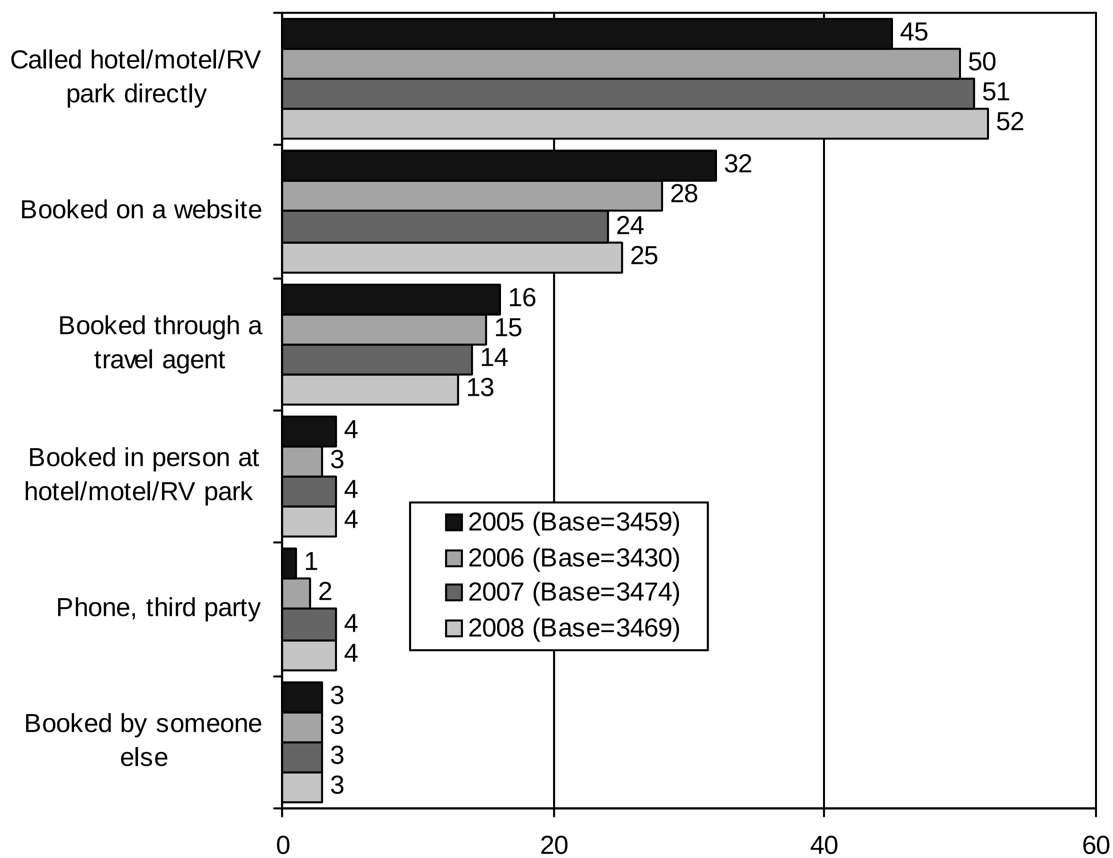
FIGURE 36
Location Of Lodging
(Among Those Who Stayed Overnight)



In terms of lodging location (among those who stayed overnight), 74% stayed in a property on the Strip Corridor*, 8% stayed Downtown, and 5% stayed on the Boulder Strip. Thirteen percent (13%) stayed in outlying parts of Las Vegas (the same as last year, but an increase from 10% in both 2004 and 2005), and 1% stayed in other areas (Figure 36).

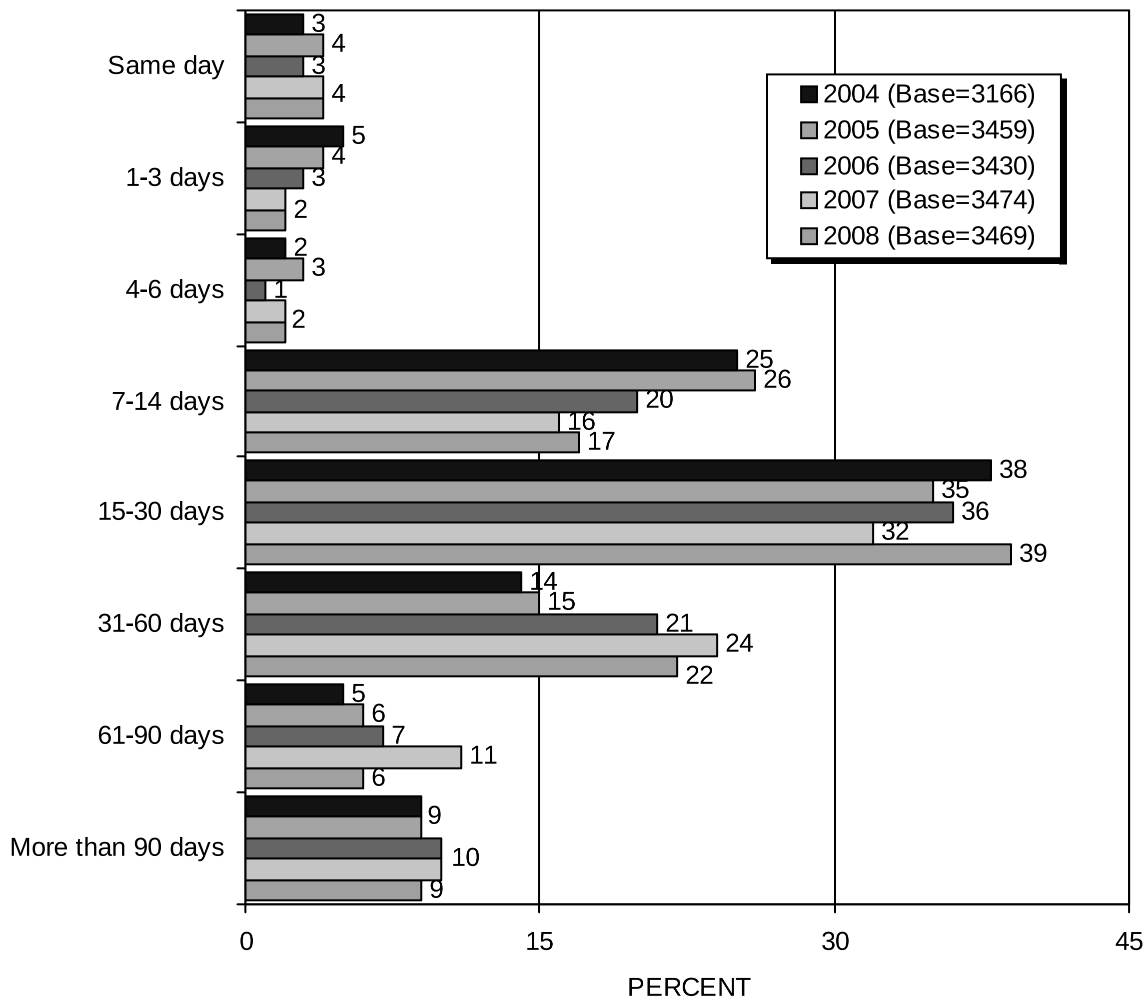
* The Strip Corridor includes properties located directly on Las Vegas Boulevard South, as well as properties near the Strip, between Valley View Road and Paradise Road.

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



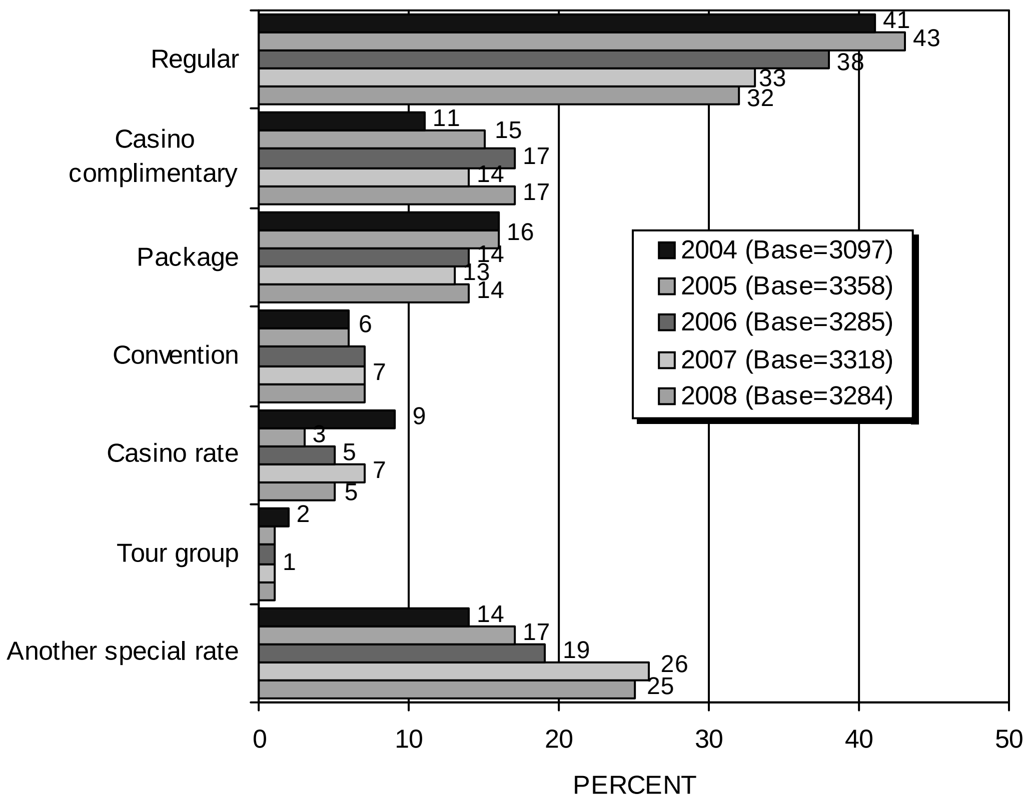
Beginning in 2005, visitors who stayed at a hotel, motel, or RV park were asked how they booked their accommodations in Las Vegas (Figure 37). In 2008 just over one-half (52%) said they called the hotel, motel, or RV park directly (up significantly from 45% in 2005), 25% said they used a website (similar to last year, but down significantly from 32% in 2005 and 28% in 2006), while 13% said they booked through a travel agent (down from 16% in 2005). Four percent (4%) said they booked in person, 4% booked by phone through a third party (but not a travel agent), and 3% said someone else booked for them.

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). More than one in three (37%) of visitors booked more than a month in advance, an increase from 28% in 2004 and 30% in 2005, but down significantly from 45% last year. By comparison, 56% of visitors booked one week to one month in advance, down significantly from 63% in 2004 and 61% in 2005, but significantly greater than the 48% who did so last year. Only 8% of visitors reported making their reservations less than one week before arrival.

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



Visitors were shown a card describing various room rates* and were asked which type of room rate they had received (Figure 39). The proportion of visitors paying a regular room rate (32%), while similar to last year (33%), has declined from 41% in 2004, 43% in 2005, and 38% in 2006. Seventeen percent (17%) received a casino complimentary rate (up significantly from 11% in 2004 and 14% last year), while 5% paid a casino rate (up from 3% in 2005, but down from 9% in 2004). Fourteen percent (14%) of visitors paid a package rate while the proportion receiving a tour group rate (1%) was the same as from 2005 to last year, but down from 2004 (2%). Seven percent (7%) paid a convention rate, and the remaining 25% paid some other kind of special rate, up from 14% in 2004, 17% in 2005, and 19% in 2006.

* 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.

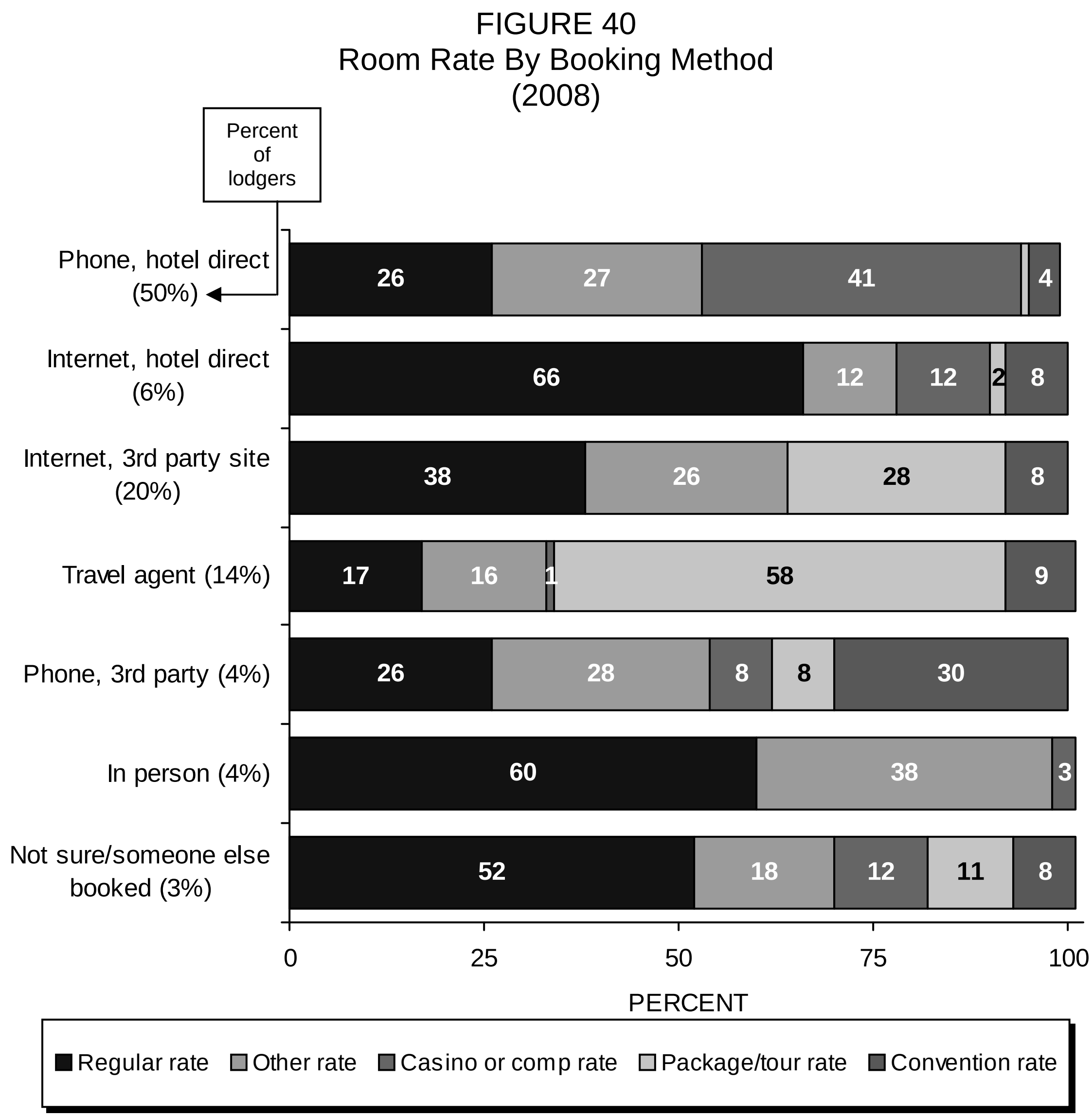
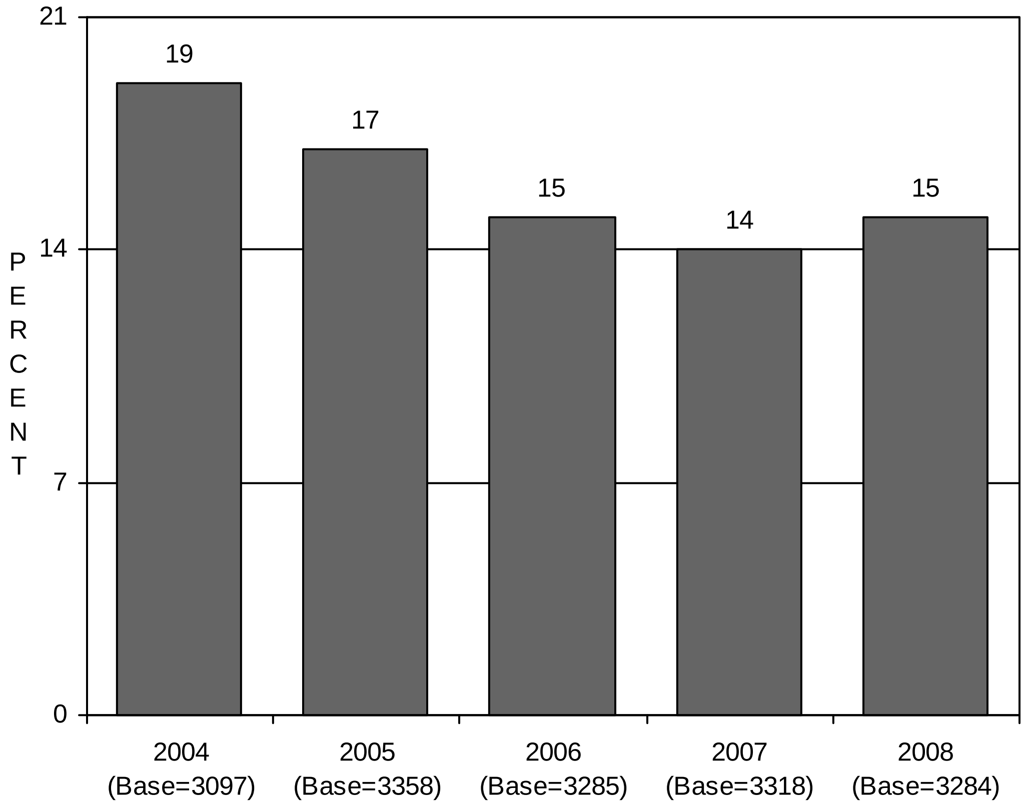


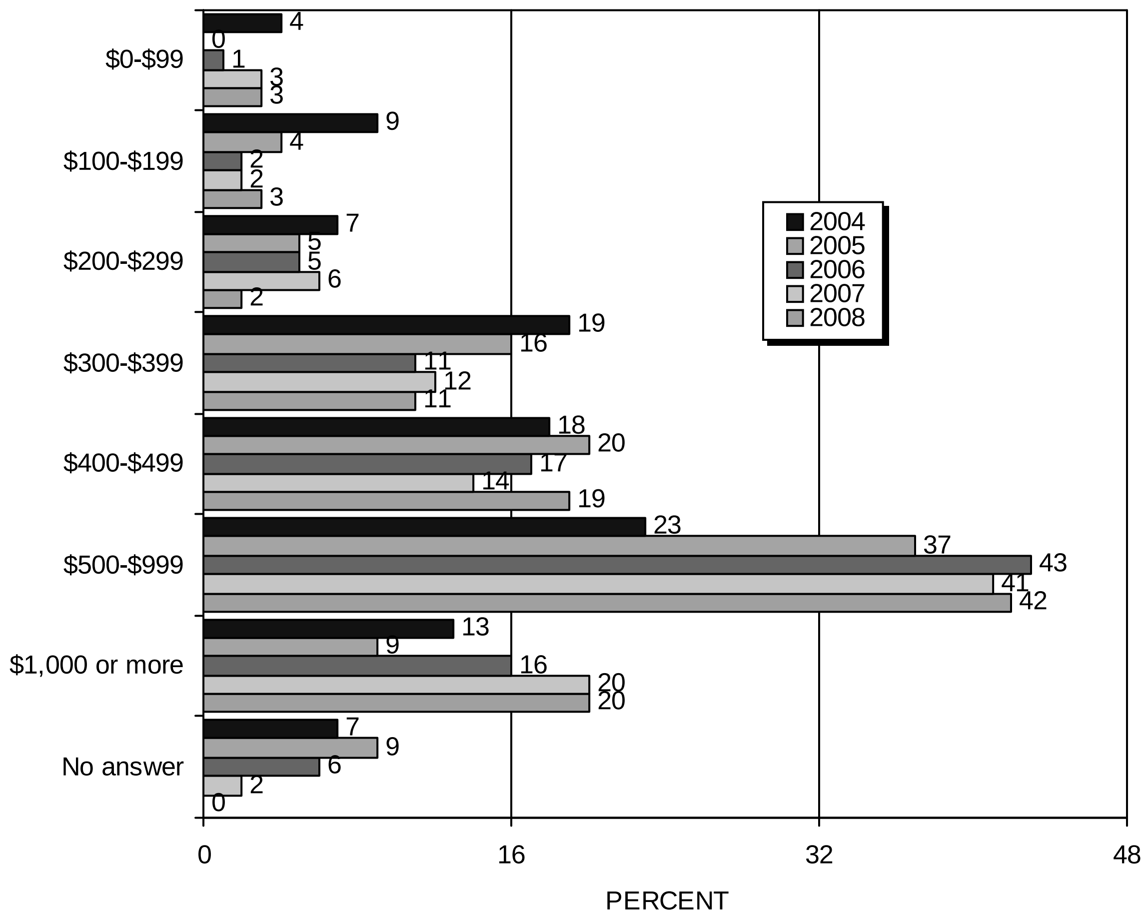
Figure 40 shows the room rate category by the booking method for 2008. Those who booked on the Internet directly (66%) or in person (60%) were most likely to say they got a regular room rate. Those who booked through a travel agent (58%) were far more likely than others say they got a package rate, and almost no packages were booked by *directly* contacting the hotel – either in person, on the phone, or on the Internet. Those who booked in person (38%) were most likely to say they received some other special room rate, followed by phone through a third party (28%), phone direct (27%) and third-party Internet (26%). Those who called the hotel directly (41%) were more likely than others to say they got a casino or casino complimentary rate. Those who went through a third-party by phone (30%) were more likely than others to say they received a convention rate.

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



Fifteen percent (15%) of visitors purchased a package deal or were part of a tour group, similar to past years, but down significantly from 19% in 2004 (Figure 41).

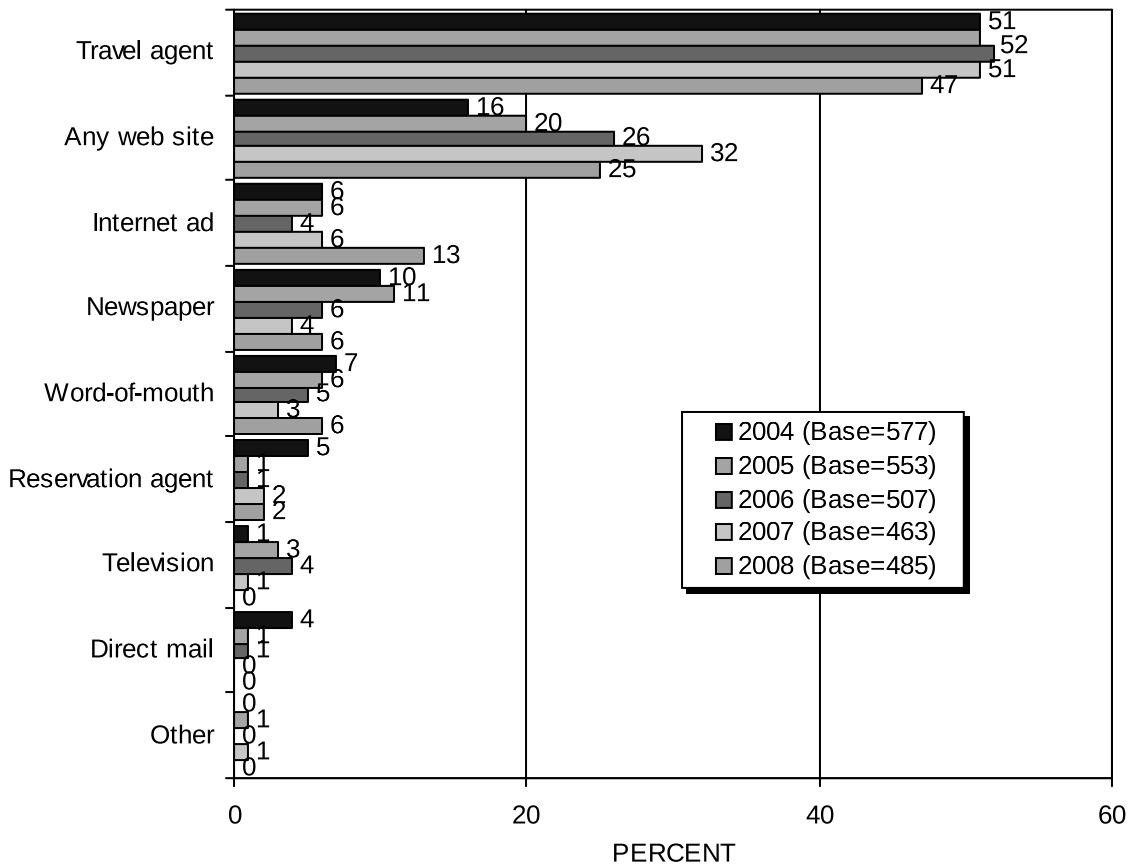
FIGURE 42
Cost Of Package Per Person
(Among Those Who Bought A Package)



Means: 2004=$561.49, 2005=$571.43, 2006=$662.78; 2007=$709.90; 2008=$746.69
Base Sizes: 2004=577, 2005=553, 2006=507; 2007=463; 2008=485

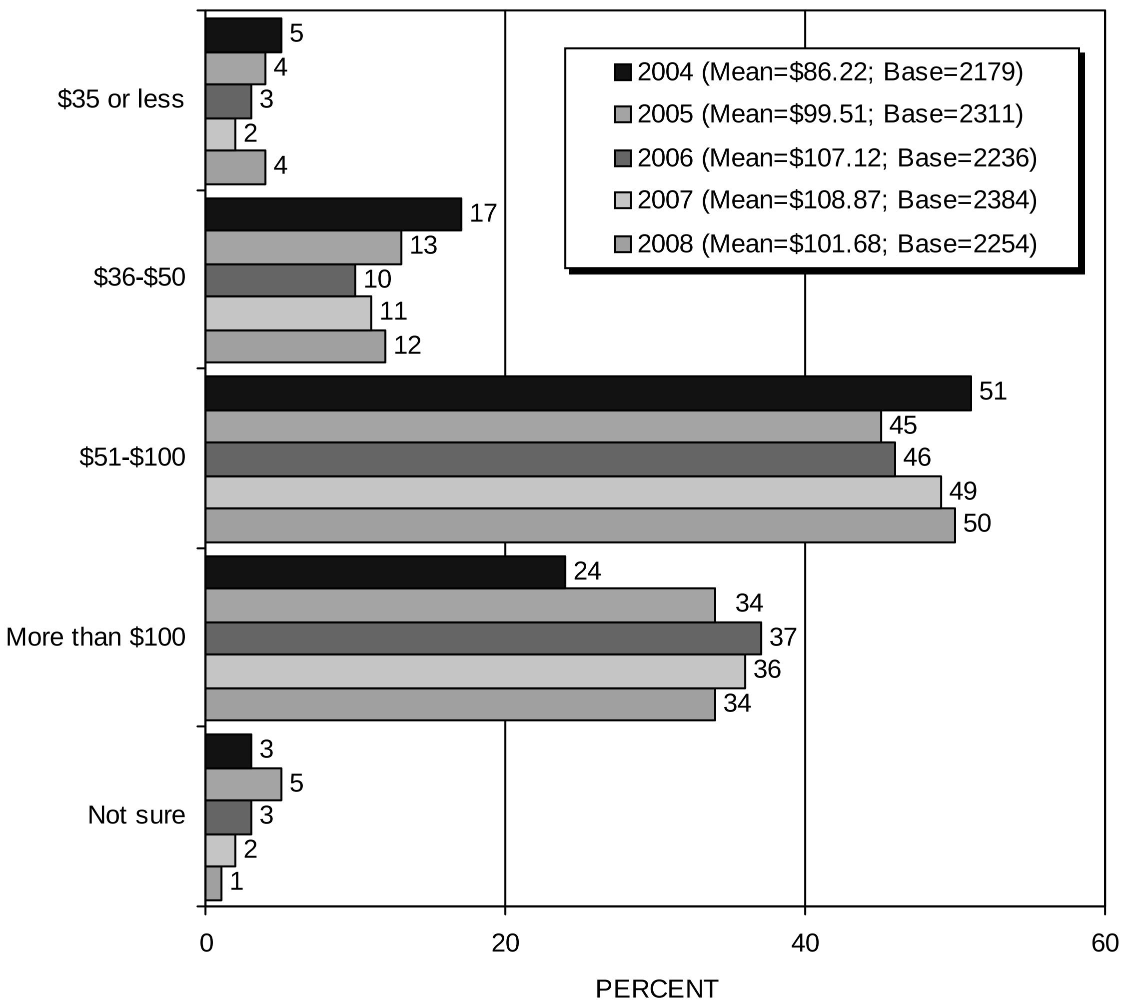
We asked those who had purchased a hotel, airline, or a tour/travel group package how much their packages cost per person (Figure 42). The average cost of such a package in 2008 was $746.69, not significantly different from last year, but up significantly from $561.49 in 2004, $571.43 in 2005, and $662.78 in 2006.

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). Nearly one-half (47%) said from a travel agent. One in four (25%) mentioned a website (down from 32% last year, but an increase from 16% in 2004), while 13% said an Internet ad (up from all prior years), 6% said a newspaper (down from 10% in 2004 and 11% in 2005), 6% said through word of mouth (up from 3% last year), and 2% said from a reservation agent.

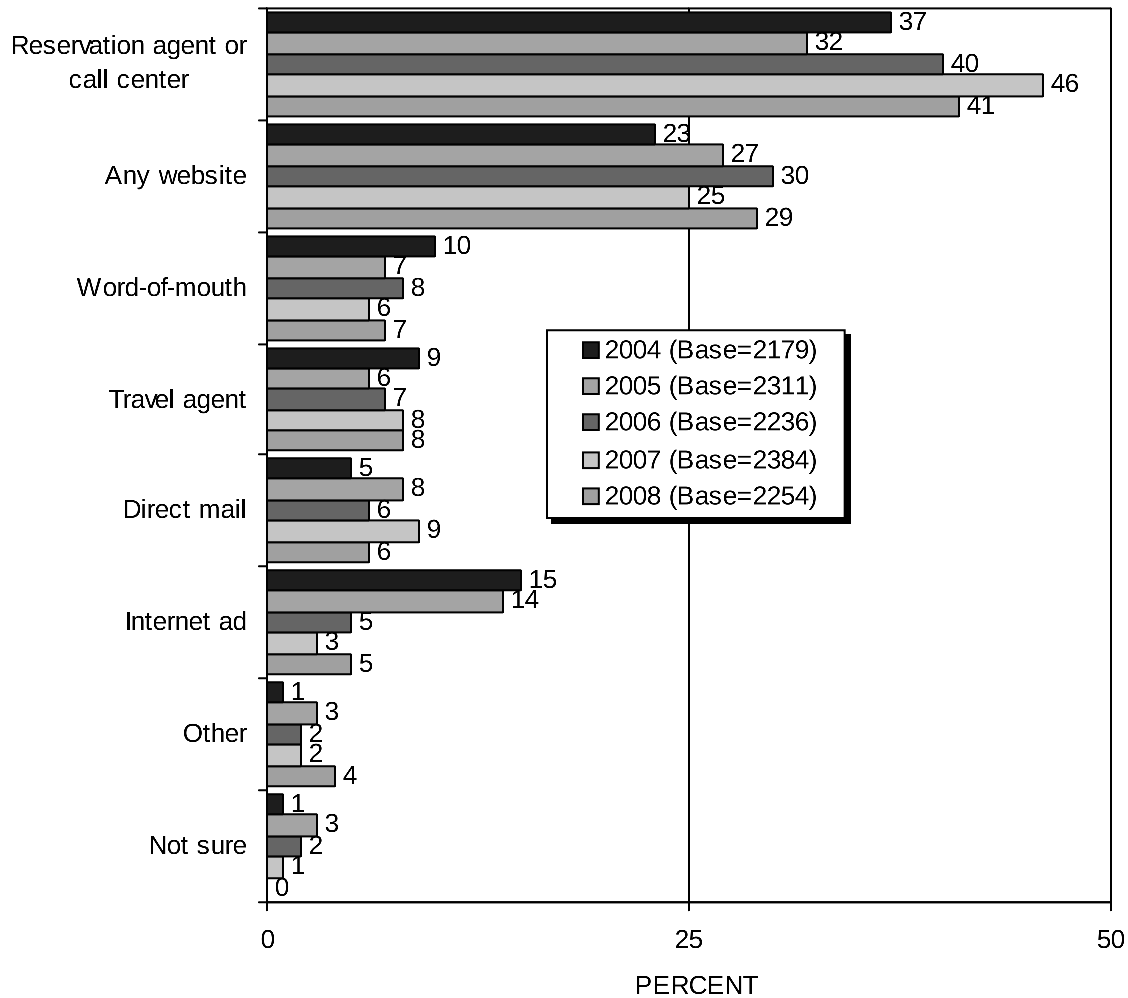
FIGURE 44
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package)



We looked at lodging expenditures among those who did *not* purchase travel packages (Figure 44). One-half (50%) of these non-package visitors paid between $51 and $100 for their room, similar to last year, but up significantly from 45% in 2005 and 46% in 2006. One-third (34%) paid over $100 per night for their room, a significant increase from 24% in 2004.

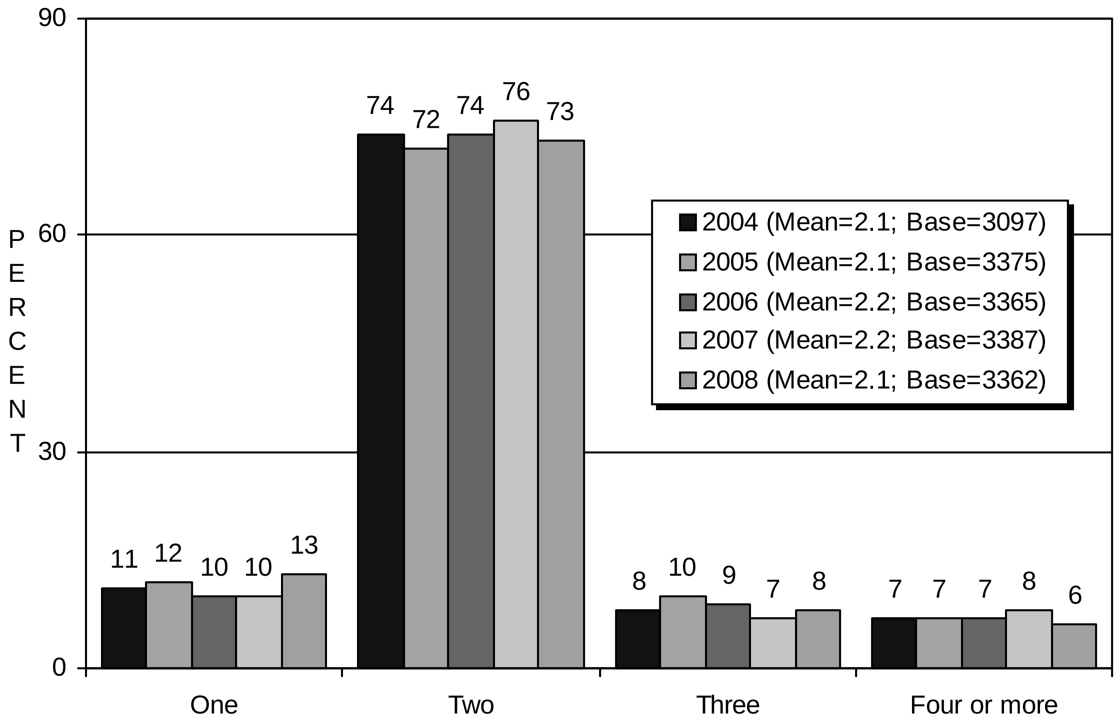
The average daily room rate for non-package visitors was $101.68 in 2008, down significantly from $107.12 in 2006, and $108.87 last year – but up from $86.22 in 2004.

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



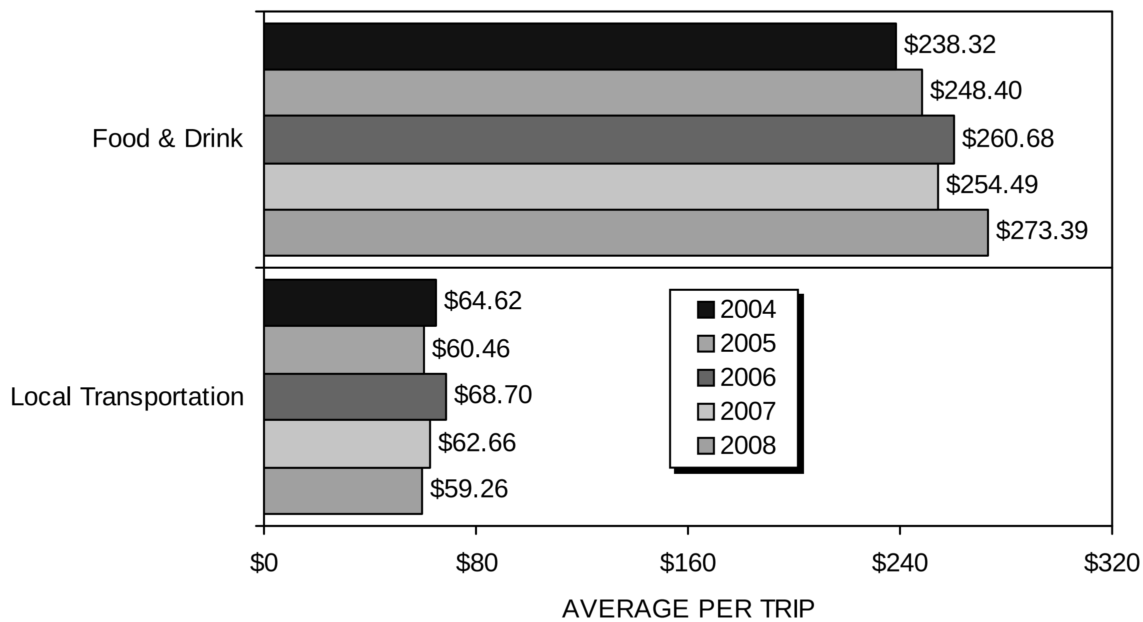
Visitors were asked how they first found out about the room rate they paid (Figure 45). Four in ten (41%) said it was through a reservation agent or call center, down from 46% last year, but up from 37% in 2004 and 32% in 2005. Twenty-nine percent (29%) mentioned a website, up from 23% in 2004. Eight percent (8%) mentioned a travel agent, 7% said through word-of-mouth (down from 10% in 2004), 6% mentioned direct mail (down from 9% last year), and 5% said an Internet ad, down from 15% in 2004 and 14% in 2005, but up significantly from 3% last year.

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



As in past years, the majority (73%) of visitors who stayed in a hotel or motel said two people stayed in their room (Figure 46). The mean (average) number of room occupants in 2008 was 2.1, down from 2.2 in 2006 and 2007.

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



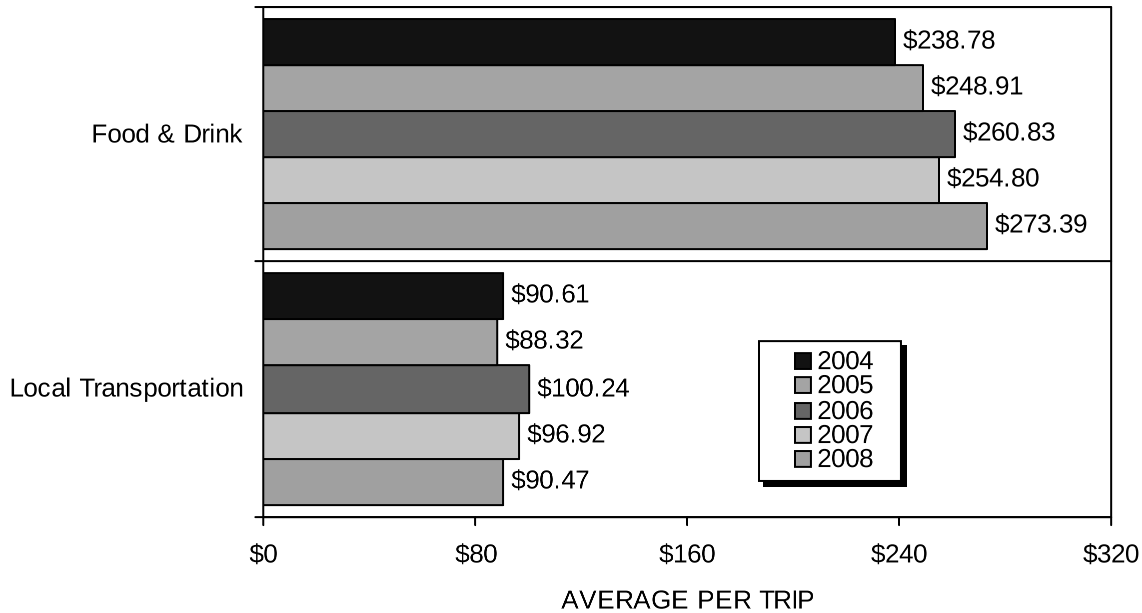
We asked all visitors about their daily expenditures on food and drink and on local transportation.

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 expenditures on food and drink in 2008 were $273.39, up significantly from past years.

The average transportation expenditures for 2008 were $59.26, down significantly from $68.70 in 2006.

* 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, average trip expenditures on food and drink in 2008 were $273.39, up significantly from past years (Figure 48).

The average trip expenditures on local transportation for 2008 were $90.47, down significantly from $100.24 in 2006 and $96.92 last year.

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

	2004	2005	2006	2007	2008
Food and Drink					
Base size	(3294)	(3592)	(3592)	(3590)	(3601)
Proportion of total	99.8%	99.8%	99.8%	99.7%	100.0%
Local Transportation					
Base size	(2350)	(2456)	(2465)	(2323)	(2358)
Proportion of total	71%	68%	68%	65%	65%

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

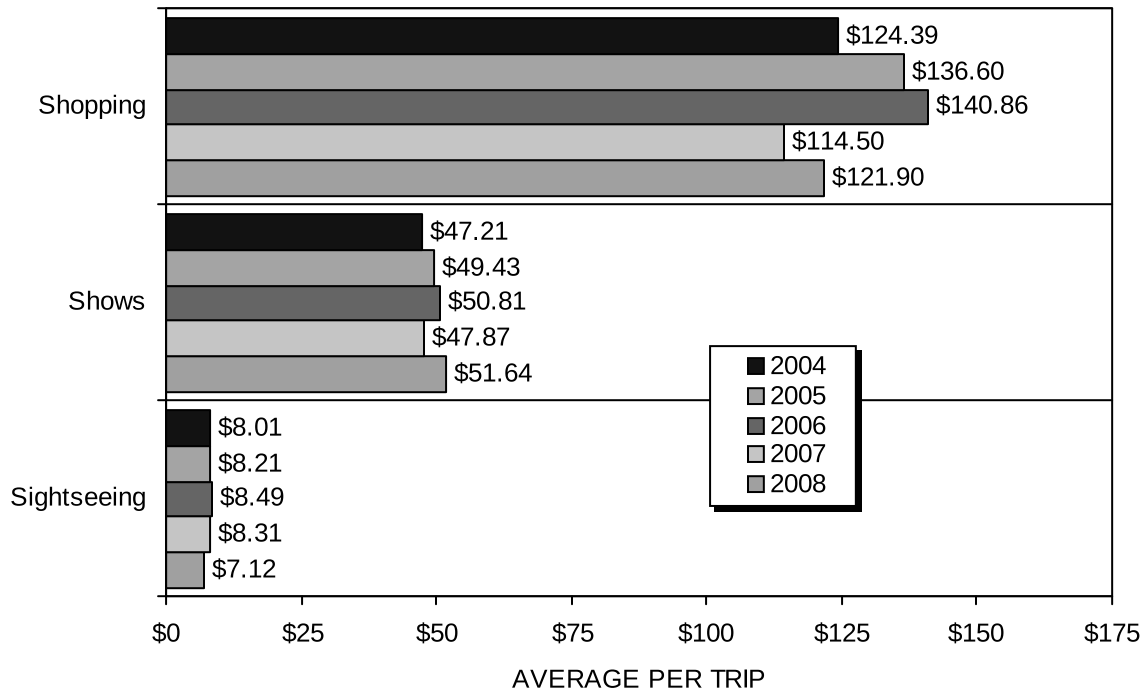
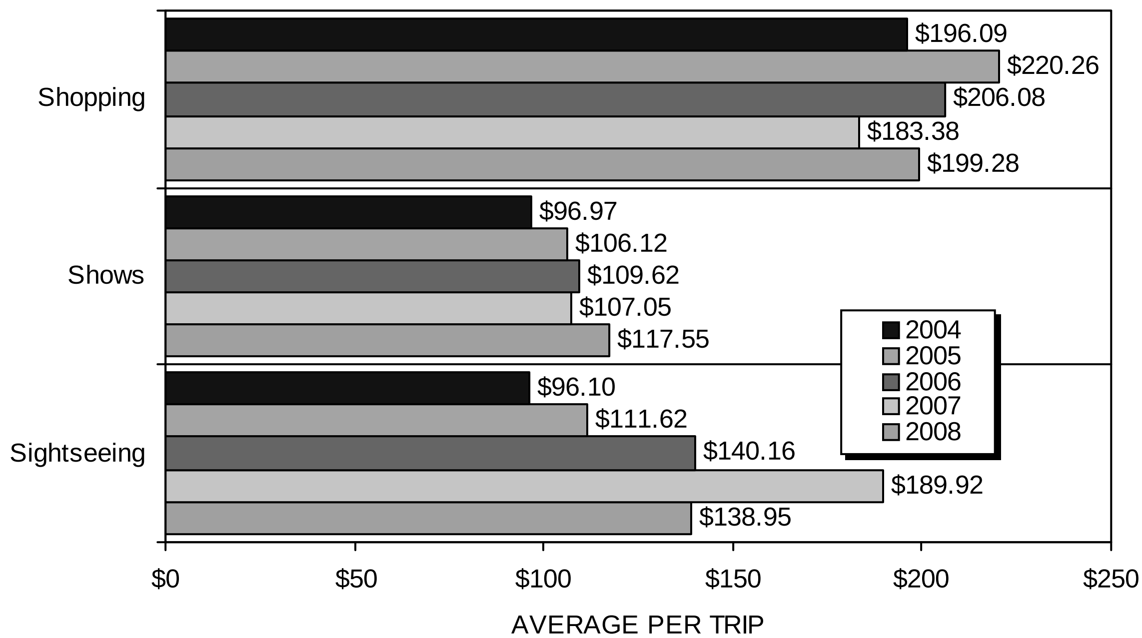


Figure 49 shows average expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas — *including visitors who said they spent nothing* in these categories. The average trip expenditures on shopping were $121.90, down significantly from $140.86 in 2006. The average expenditures on shows were $51.64, and the average expenditures on sightseeing were $7.12.

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 expenditures were $199.28, down significantly from $220.26 in 2005 (Figure 50). The average trip total spent on shows was $117.55, up from $96.97 in 2004, $106.12 in 2005, and $107.05 last year. The sightseeing total was $138.95, down from $189.92 last year, but up significantly from $96.10 in 2004, and $111.62 in 2005.

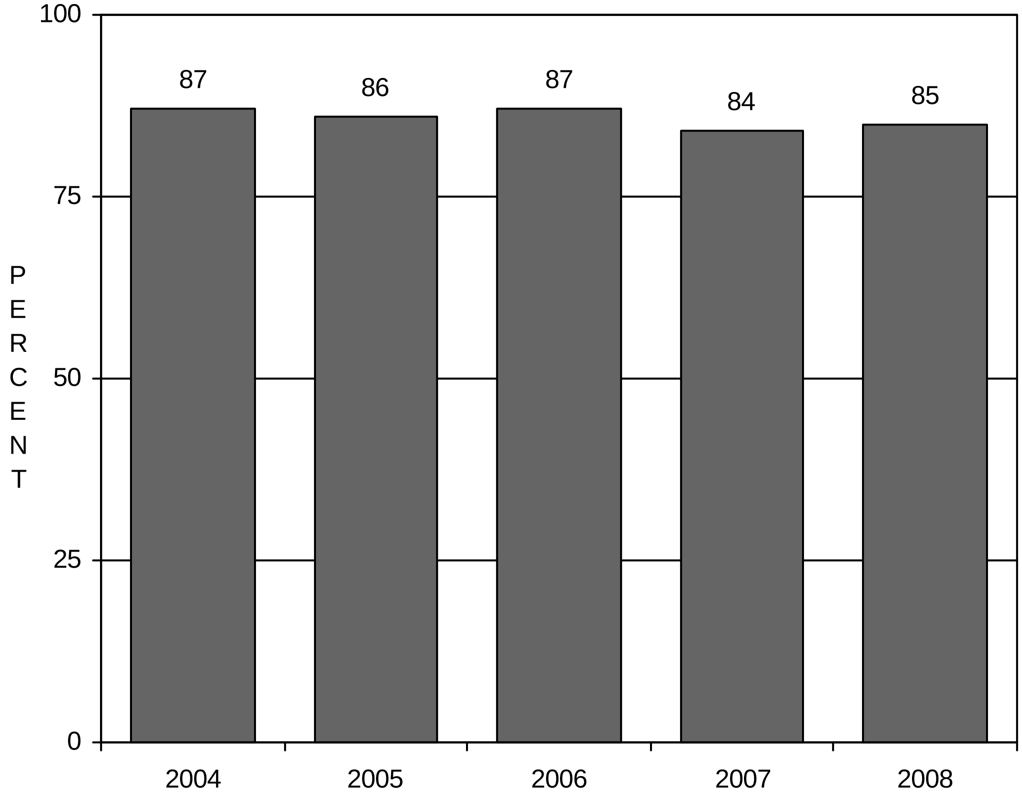
† Percentages of respondents who spent money in each category are shown in the following table:

	2004	2005	2006	2007	2008
Shopping					
Base size	(2093)	(2232)	(2459)	(2245)	(2203)
Proportion of total	63%	62%	68%	62%	61%
Shows					
Base size	(1606)	(1677)	(1667)	(1607)	(1582)
Proportion of total	49%	47%	46%	45%	44%
Sightseeing					
Base size	(274)	(265)	(218)	(157)	(185)
Proportion of total	8%	7%	6%	4%	5%

GAMING BEHAVIOR AND BUDGETS

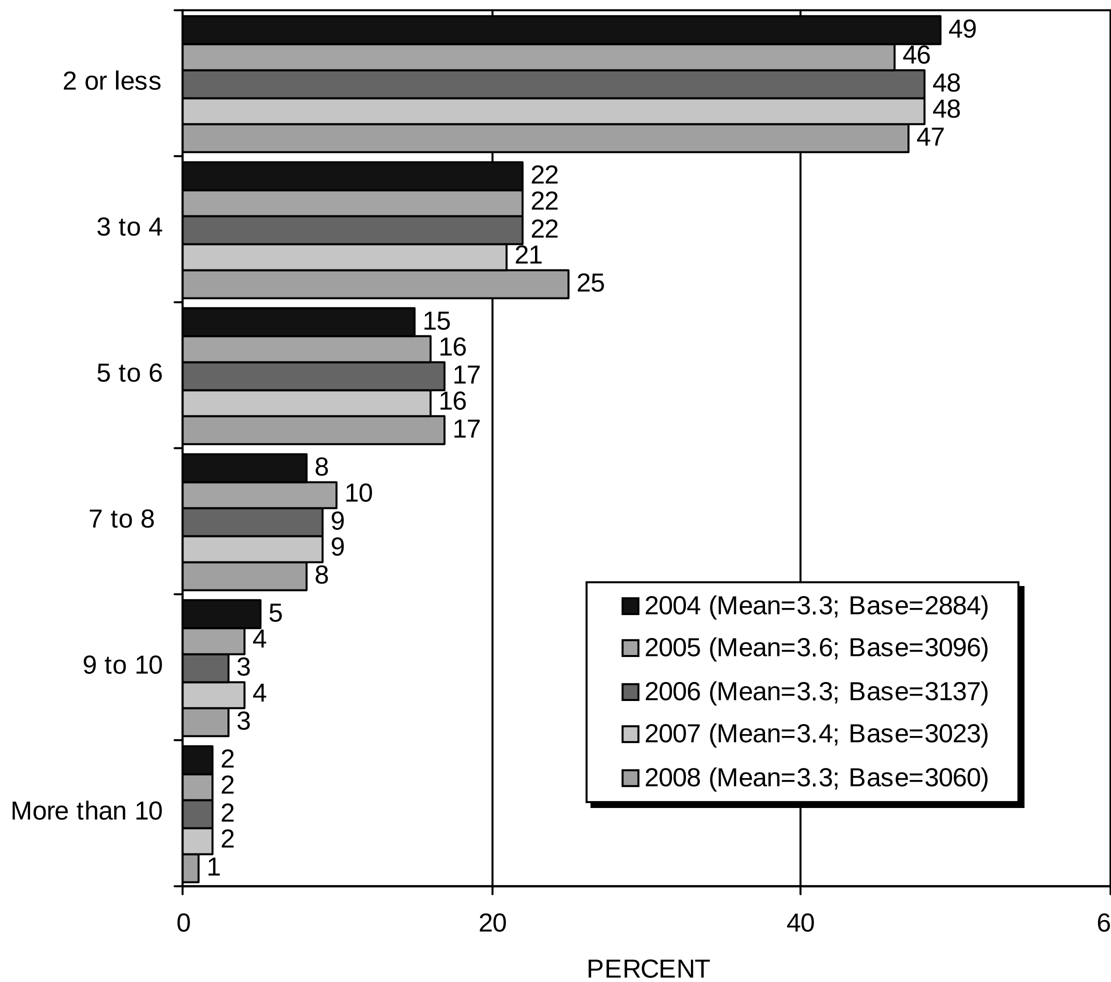
Eighty-five percent (85%) of all visitors said they gambled while in Las Vegas, down from 87% in 2004 and 2006 (Figure 51).

FIGURE 51
Whether Gambled While In Las Vegas*



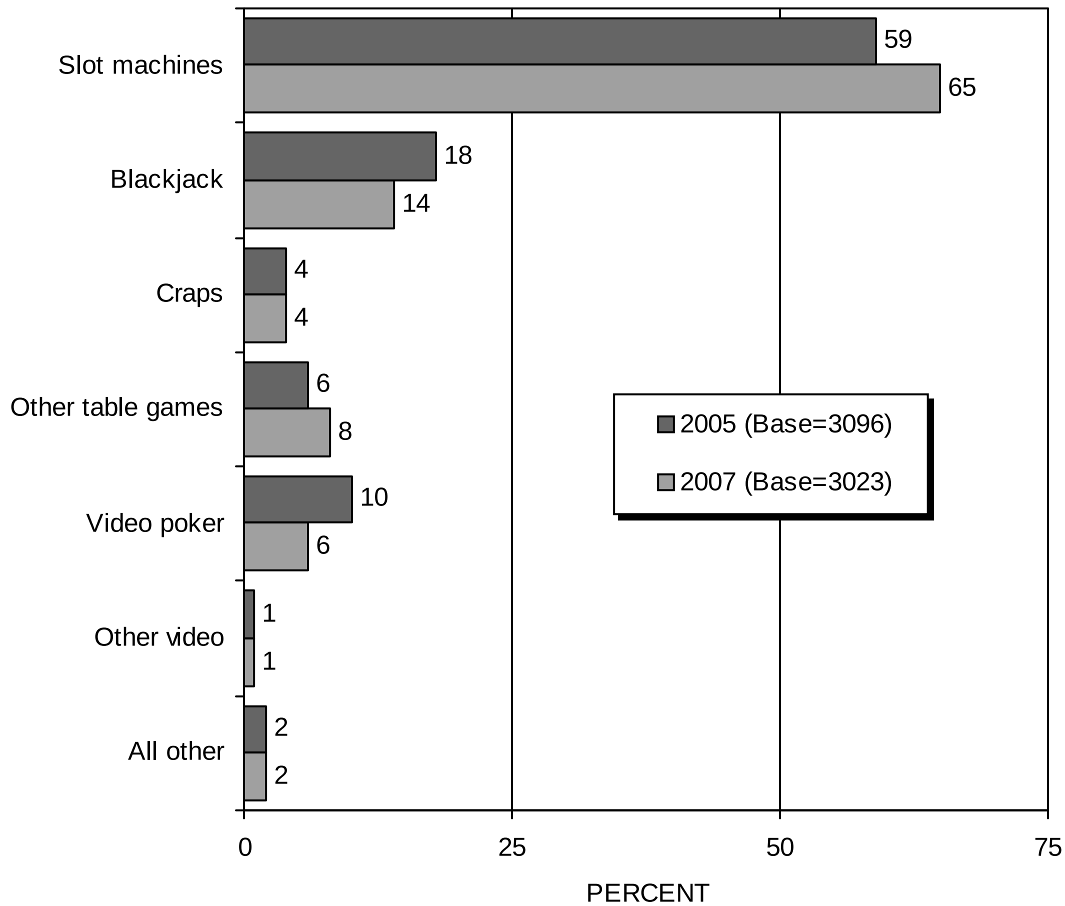
* Only "yes" responses are reported in this chart.

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



Among those who gambled while in Las Vegas, the average amount of time spent gambling per day was 3.3 hours, similar to last year, but down significantly from 3.6 hours in 2005 (Figure 52).

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 65% of gamblers, up significantly from 59% in 2005. Fourteen percent (14%) said they played blackjack the most often (down significantly from 18% in 2005), followed by video poker (6%, down significantly from 10% in 2005), and craps (4%, unchanged from 2005). Eight percent (8%) played other tables games most often (Figure 53).

* This question is asked every other year and was not asked in 2004, 2006, or 2008

FIGURE 54
Number Of Casinos Visited*

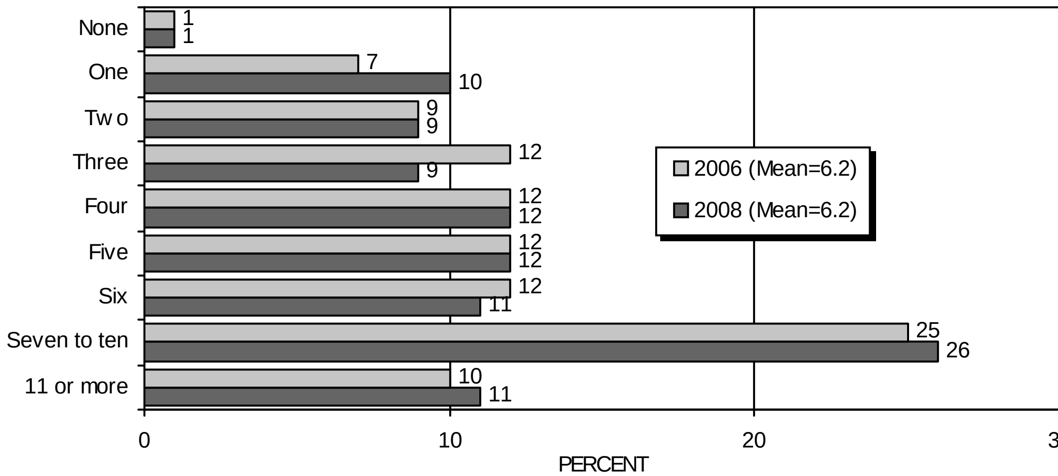
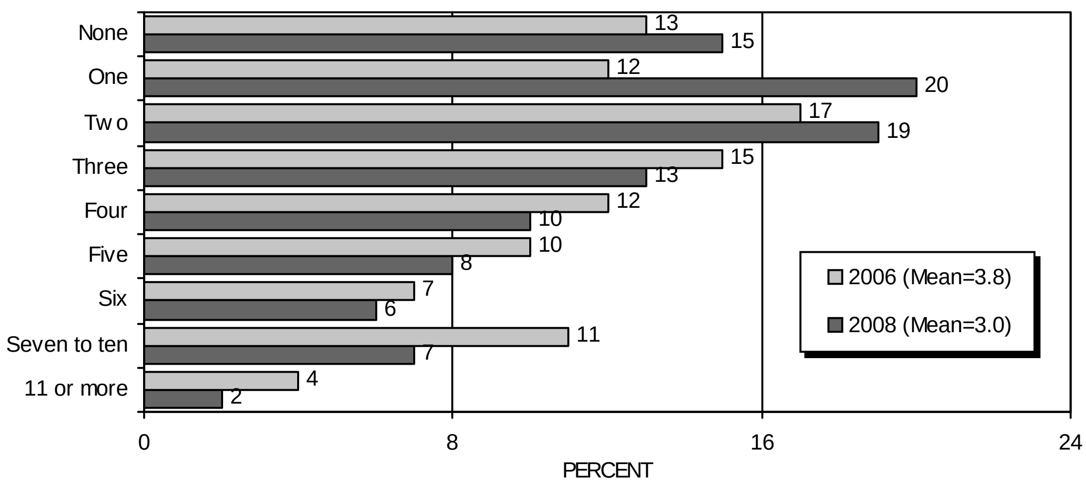


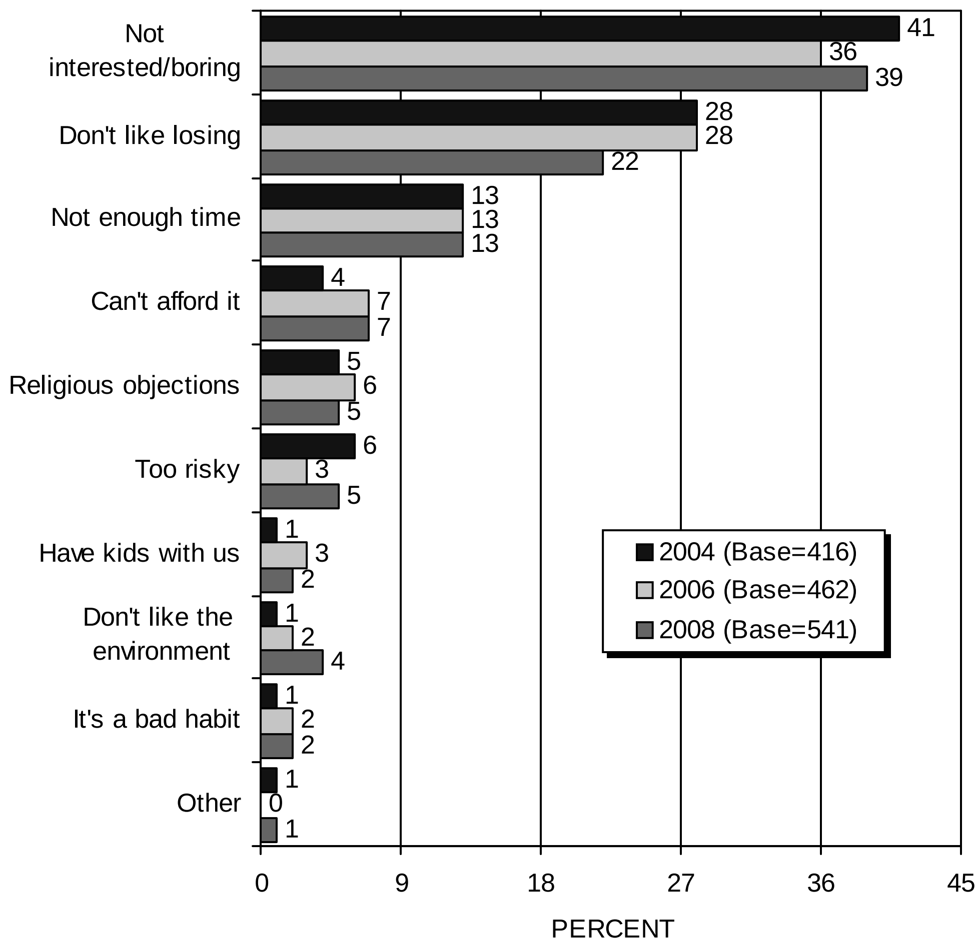
FIGURE 55
Number Of Casinos Where Gambled*



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 2008 was 6.2 (the same as 2006), and the number of casinos at which visitors gambled was 3.0, down significantly from 3.8 in 2006 (Figures 54 and 55).

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

FIGURE 56
Main Reason For Not Gambling*
(Among Those Who Did Not Gamble – Asked Every Other Year)



Visitors who did not gamble were asked why (Figure 56). The largest numbers of these visitors said they were not interested in gambling or found it boring (39%). Another 22% said they did not like losing, while 13% said they did not have enough time for gambling, 7% said they cannot afford it, 5% voiced religious objections or said it is too risky, 4% said they do not like the gambling environment, and 2% said they have children with them or that it is a bad habit.

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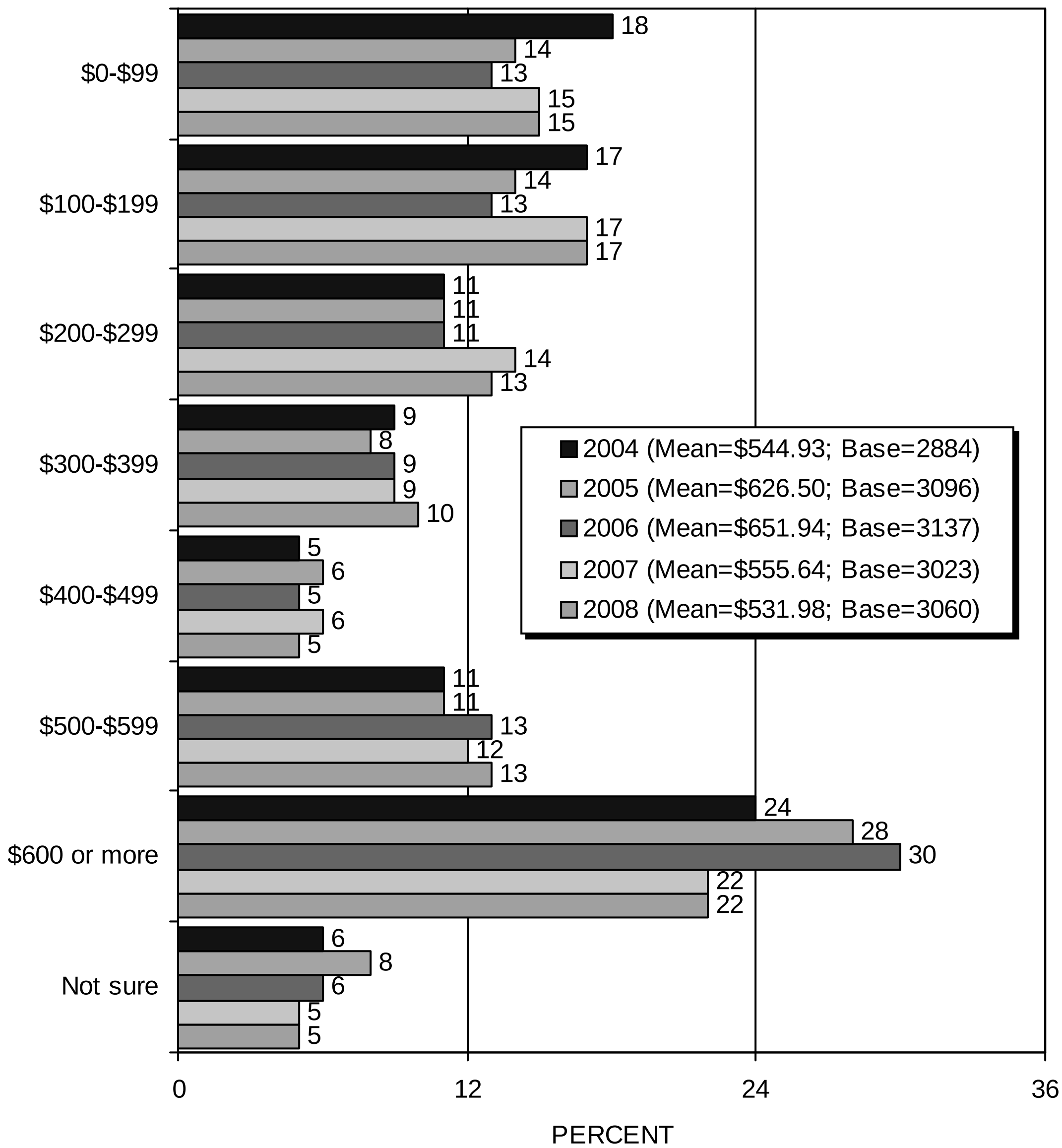
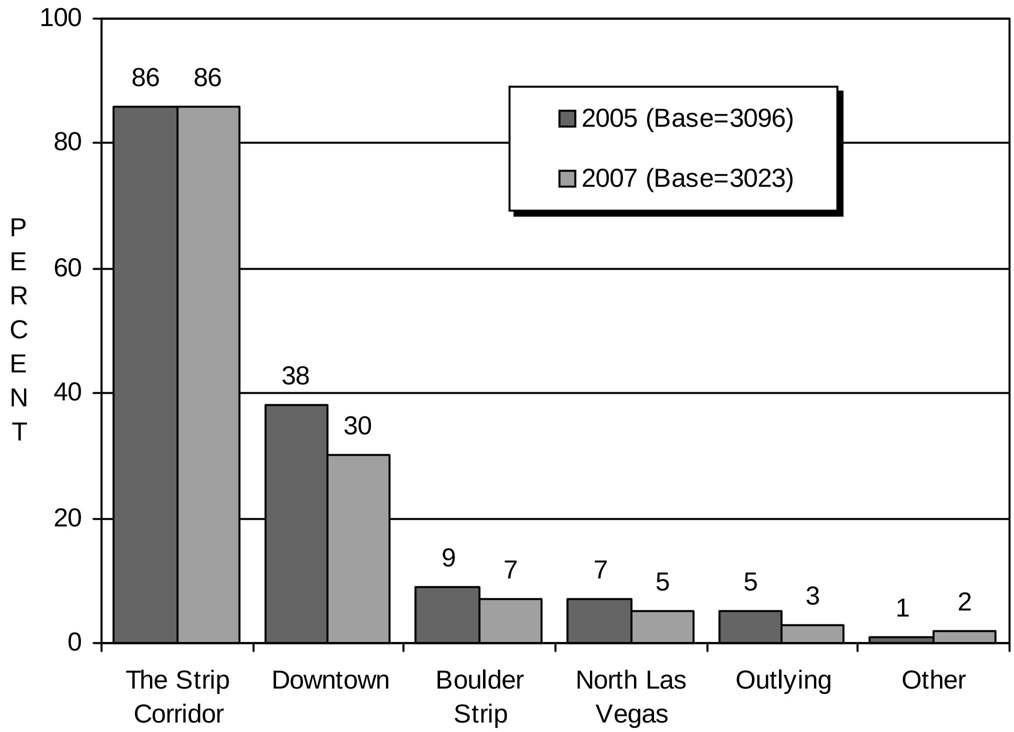
* This question is asked every other year and was not asked in 2005 or 2007.

FIGURE 57
Trip Gambling Budget
(Among Those Who Gambled)



As Figure 57 shows, the average gambling budget among those who gambled was $531.98, down from last year, and down significantly from $626.50 in 2005 and $651.94 in 2006. Twenty-two percent (22%) of gamblers said they budgeted $600 or more for gambling, the same as last year, but down significantly from 28% in 2005 and 30% in 2006.

FIGURE 58
Where Visitors Gambled*
(Among Those Who Gambled – Asked Every Other Year)



Most visitors (86%) gambled on the Strip Corridor[†] (Figure 58). Thirty percent (30%) said they gambled Downtown (down from 38% in 2005), 7% gambled in the Boulder Strip area (down from 9% in 2005), 5% in North Las Vegas, and 3% in outlying areas (down from 5% in 2005).

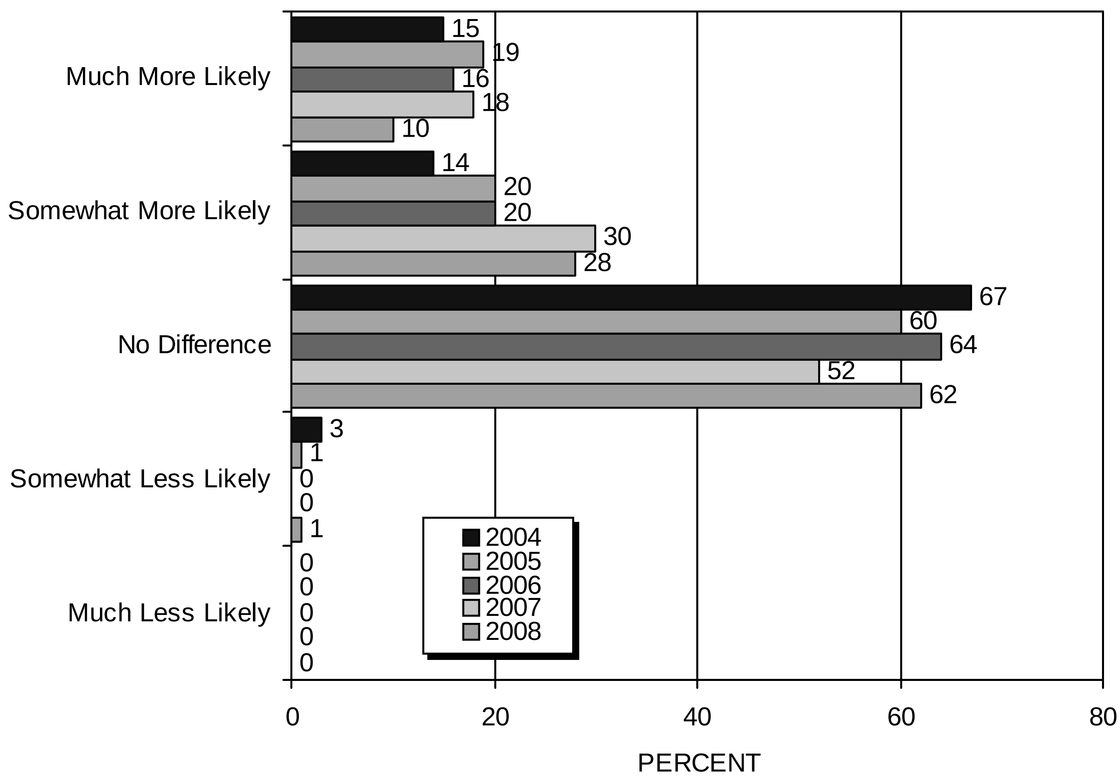
---

* This question is asked every other year and was not asked in 2004, 2006, or 2008.

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 59
Likelihood Of Visiting Las Vegas With
More Places To Gamble Outside Las Vegas



Visitors to Las Vegas were asked the following:

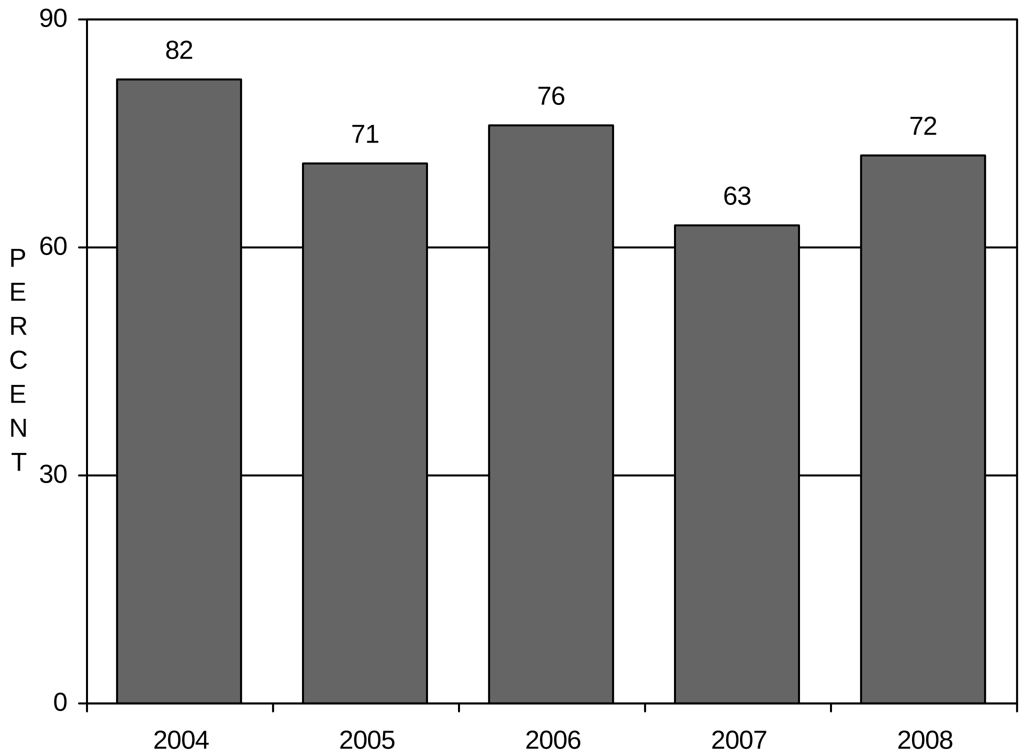
> "Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it not make a difference in your decision to visit Las Vegas?"

Thirty-eight percent (38%) said they were either somewhat or much *more* likely to visit Las Vegas, up from 29% in 2004 but down from 48% last year. Sixty-two percent (62%) of visitors said that having other places to gamble made no difference in their decision to visit Las Vegas, down from 67% in 2004, but up from 52% last year (Figure 59). One percent (1%) said they were *less* likely to visit Las Vegas, down significantly from 3% in 2004.

ENTERTAINMENT

Seventy-two percent (72%) of visitors attended shows during their stay, down significantly from 82% in 2004 and 76% in 2006, but up from 63% last year (Figure 60).

FIGURE 60
Entertainment Attendance*



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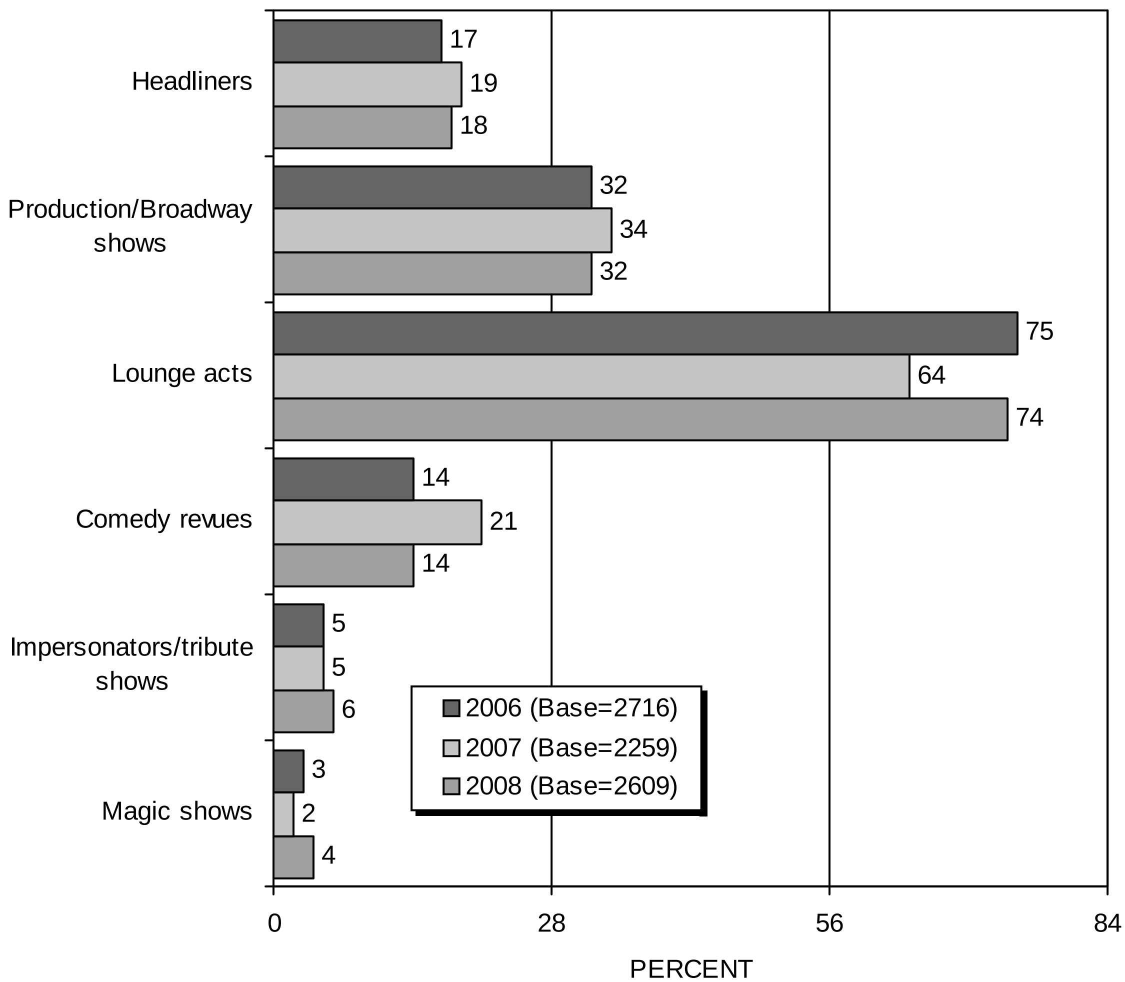
* NOTE: Only "yes" responses are reported in this chart.

FIGURE 61
Types Of Entertainment*
(Among Those Who Attended Some Form Of Entertainment)



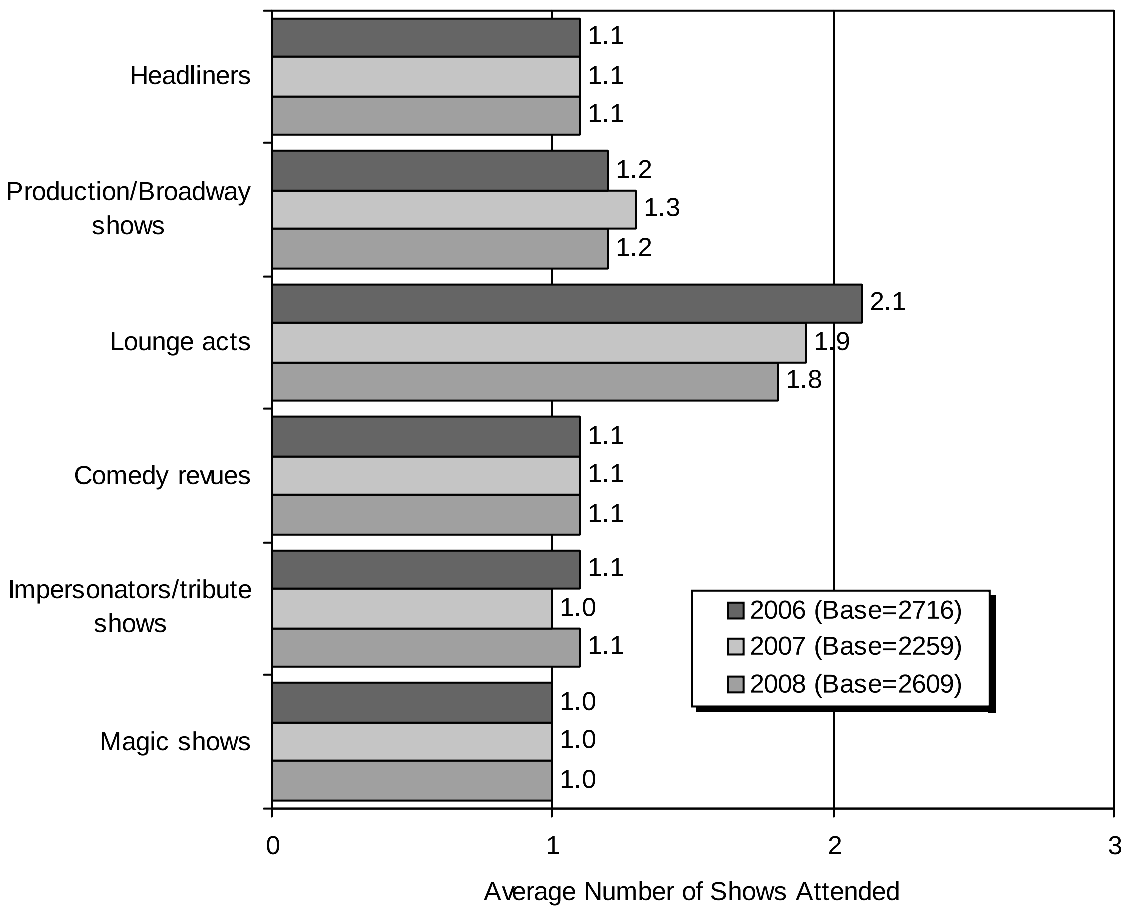
In 2008, 74% of visitors who saw a show in Las Vegas went to a lounge act (up significantly from 64% in 2007), 32% went to a production or Broadway-type show, 14% saw a comedy show (down from 21% last year),18% saw a headliner, 6% saw an impersonator/tribute show, and 4% saw a magic show (Figure 61).

---

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

Multiple responses were permitted.

FIGURE 62
Average Number Of Shows Attended*
(Among Those Who Attended Some Form Of Entertainment)

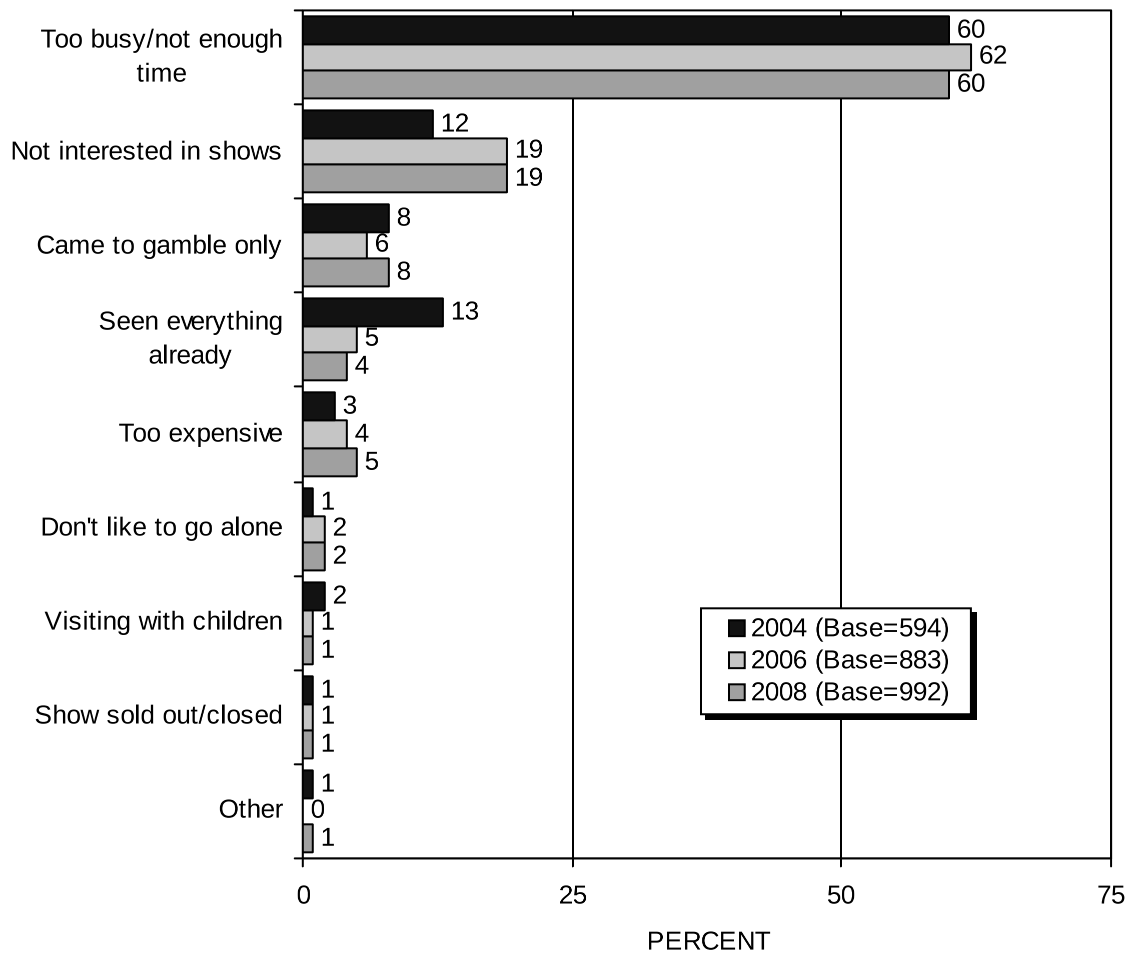


Visitors who saw shows were asked how many shows they saw of each type (Figure 62). The average number of shows attended was highest for visitors who saw lounge acts (1.8, down from 2.1 in 2006 and 1.9 last year). Visitors also saw an average of 1.2 production and Broadway-type shows, 1.1 headliners, 1.1 comedy revues, 1.1 impersonators/tribute shows, and 1.0 magic shows.

---

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

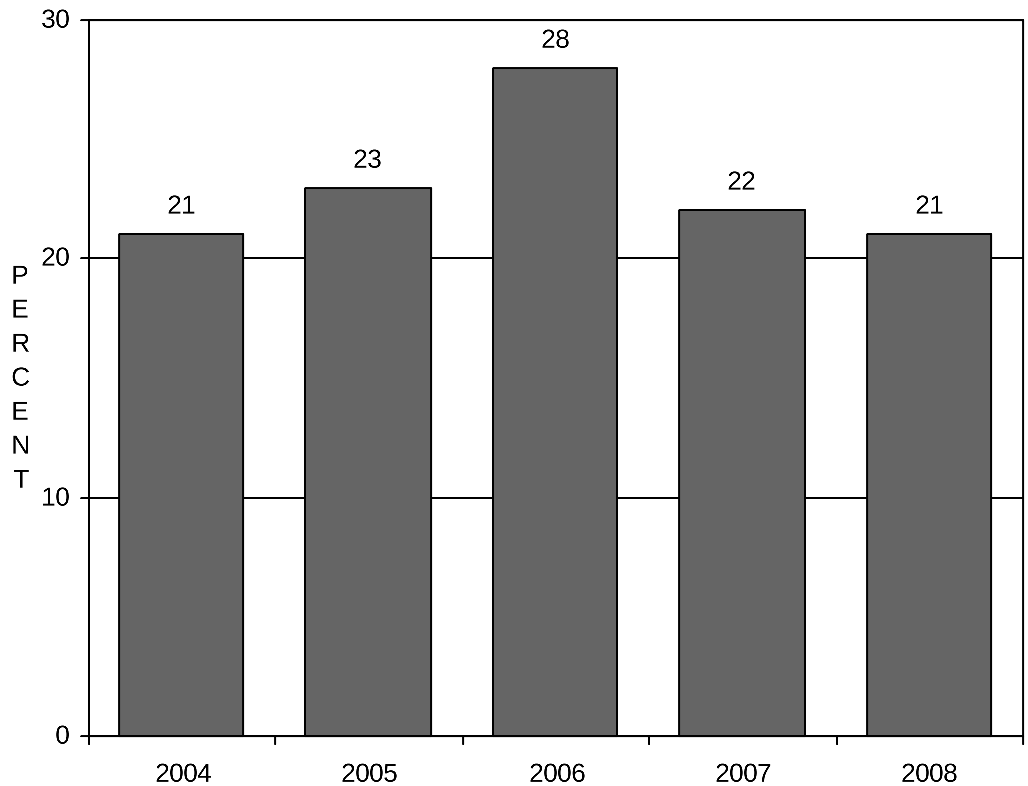
FIGURE 63
Main Reason For Not Attending Any Shows*
(Among Those Who Attended No Shows – Asked Every Other Year)



Visitors who did not attend any shows while in Las Vegas were asked why (Figure 63). Most (60%) said they were too busy. Nineteen percent (19%) said they were not interested in shows (up significantly from 12% in 2004), 8% said they came only to gamble, 4% said they had already seen all the shows (down from 13% in 2004), and 5% said the shows are too expensive.

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

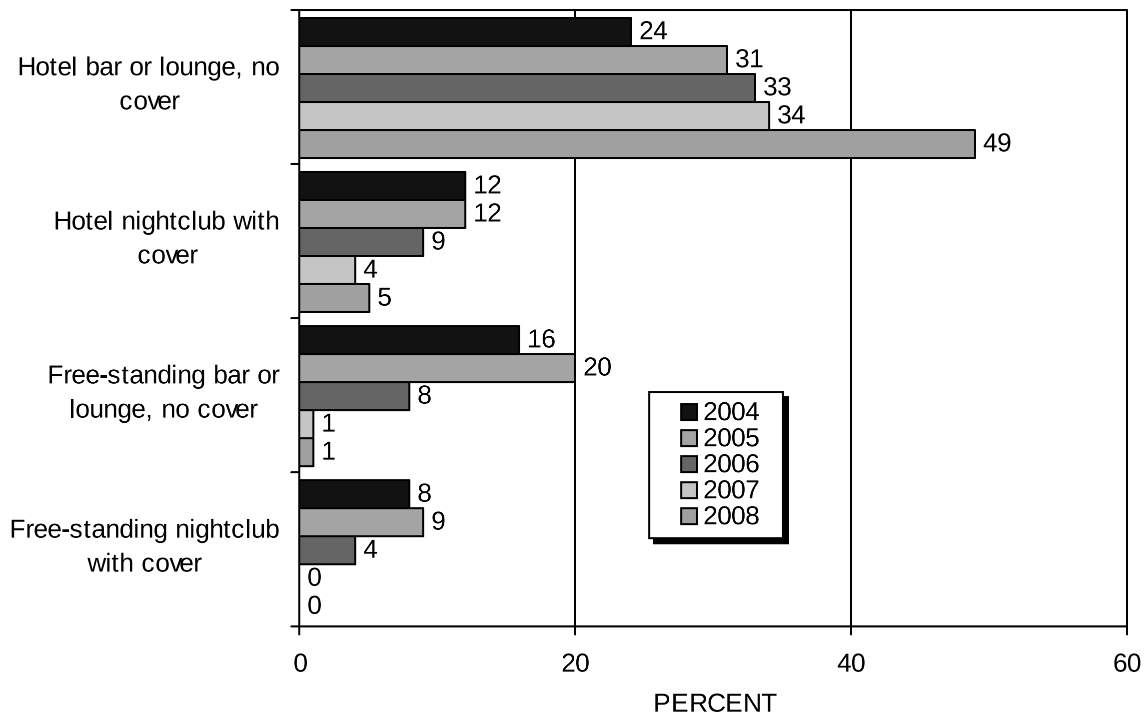
FIGURE 64
Whether Has Been To Other Paid Attractions*



We asked visitors if they had been to other Las Vegas attractions for which they had to pay, such as the theme parks, water parks, or virtual reality rides (Figure 64). Twenty-one percent (21%) said yes, down significantly from 28% in 2006.

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

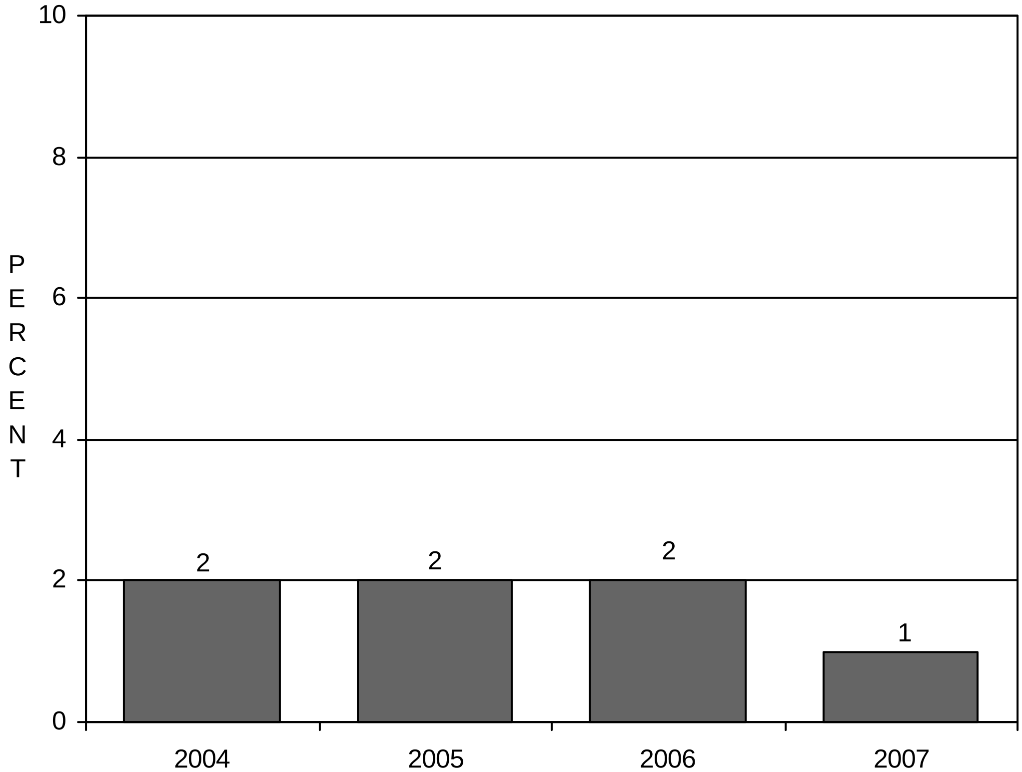
FIGURE 65
Whether Has Been To Nightclubs, Bars, and Lounges*



We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 65). Half of visitors (49%) said they had been to a no-cover hotel bar or lounge, up significantly from past years. Five percent (5%) had been to a hotel nightclub that charged a cover fee (down significantly from 12% in both 2004 and 2005 and 9% in 2006, but up significantly from 4% last year). One percent (1%) had been to a no-cover free-standing bar or lounge, and less than 1% had been to a free-standing nightclub that charged a cover fee – both similar to last year, but down significantly from 2004 to 2006.

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

FIGURE 66
Whether Played Golf*

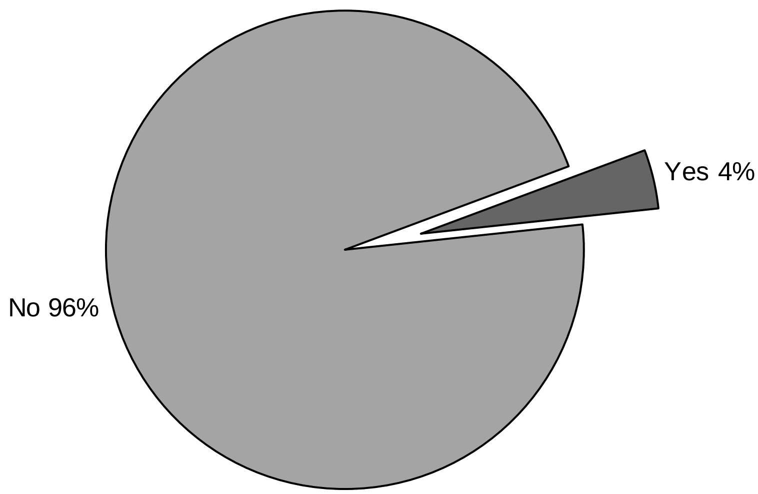


The proportion who said they had played golf during their 2007 visit to Las Vegas was 1%, down from 2% in past years (Figure 66).

* Beginning in 2008 this question is asked every other year. It was not asked in 2008.

Only "yes" responses are reported in this chart.

FIGURE 67
Whether Visited A Spa

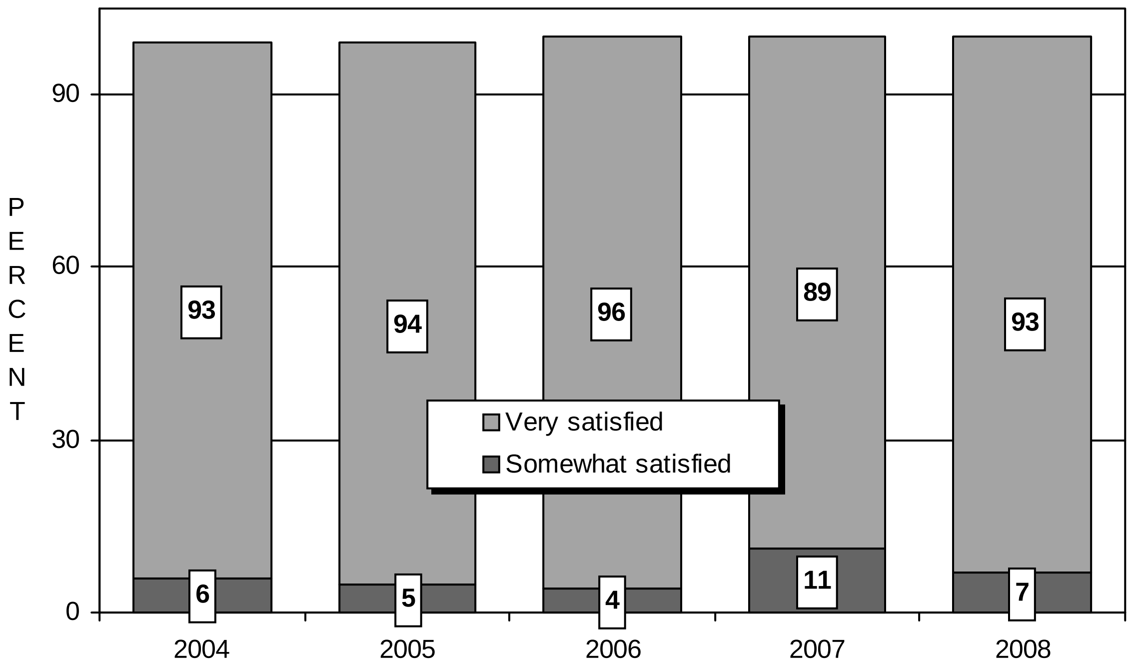


Beginning in 2008, visitors were asked if they had visited a spa during this trip to Las Vegas. Four percent (4%) said they had (Figure 67).

ATTITUDINAL INFORMATION

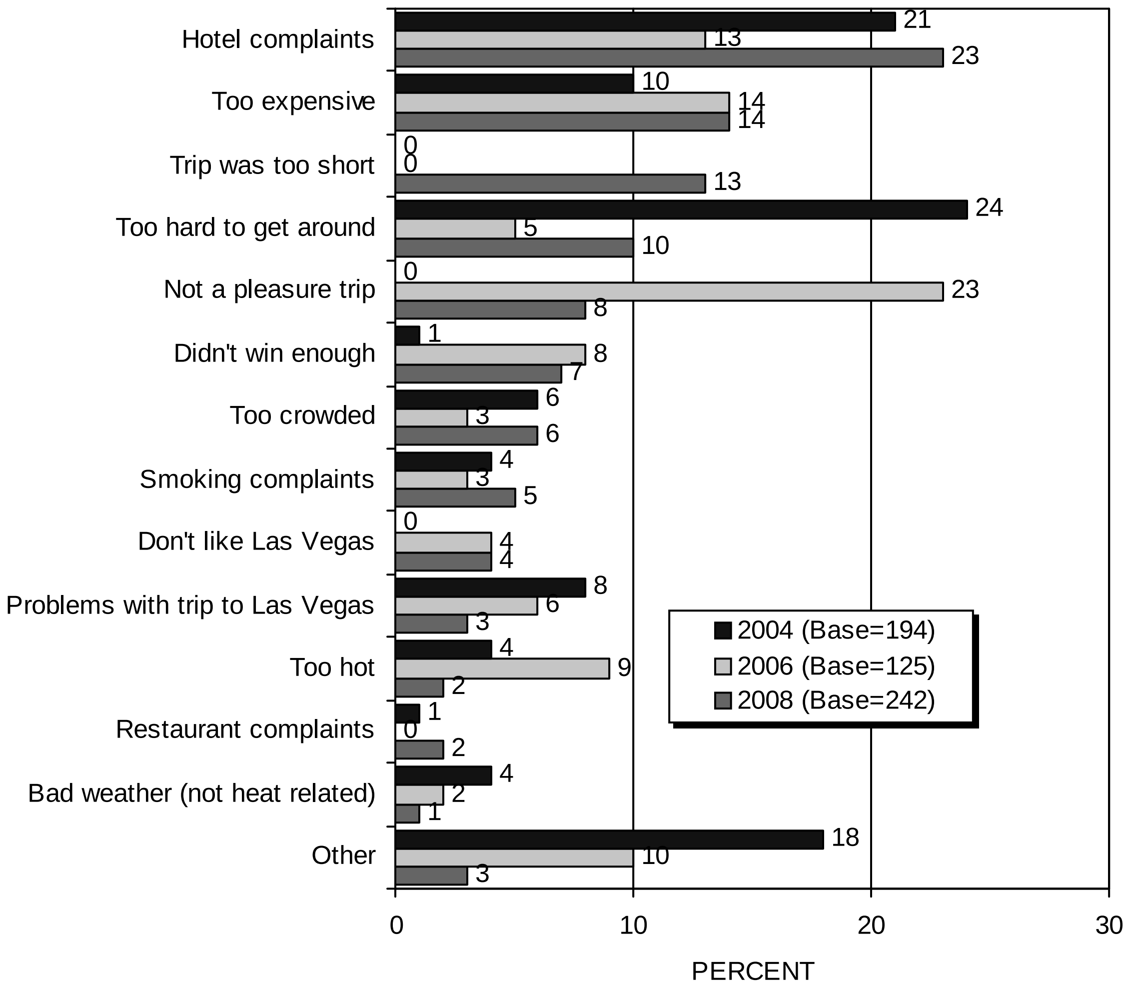
Ninety-three percent (93%) of visitors said they were "very" satisfied with their visit to Las Vegas in 2008, down from 96% in 2006, but up from 89% last year, while 7% were "somewhat" satisfied, up from 4% in 2006 but down significantly from 11% last year. Less than one percent (0.5%) were either “somewhat” or “very” dissatisfied (Figure 68).

FIGURE 68
Satisfaction With Visit*



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

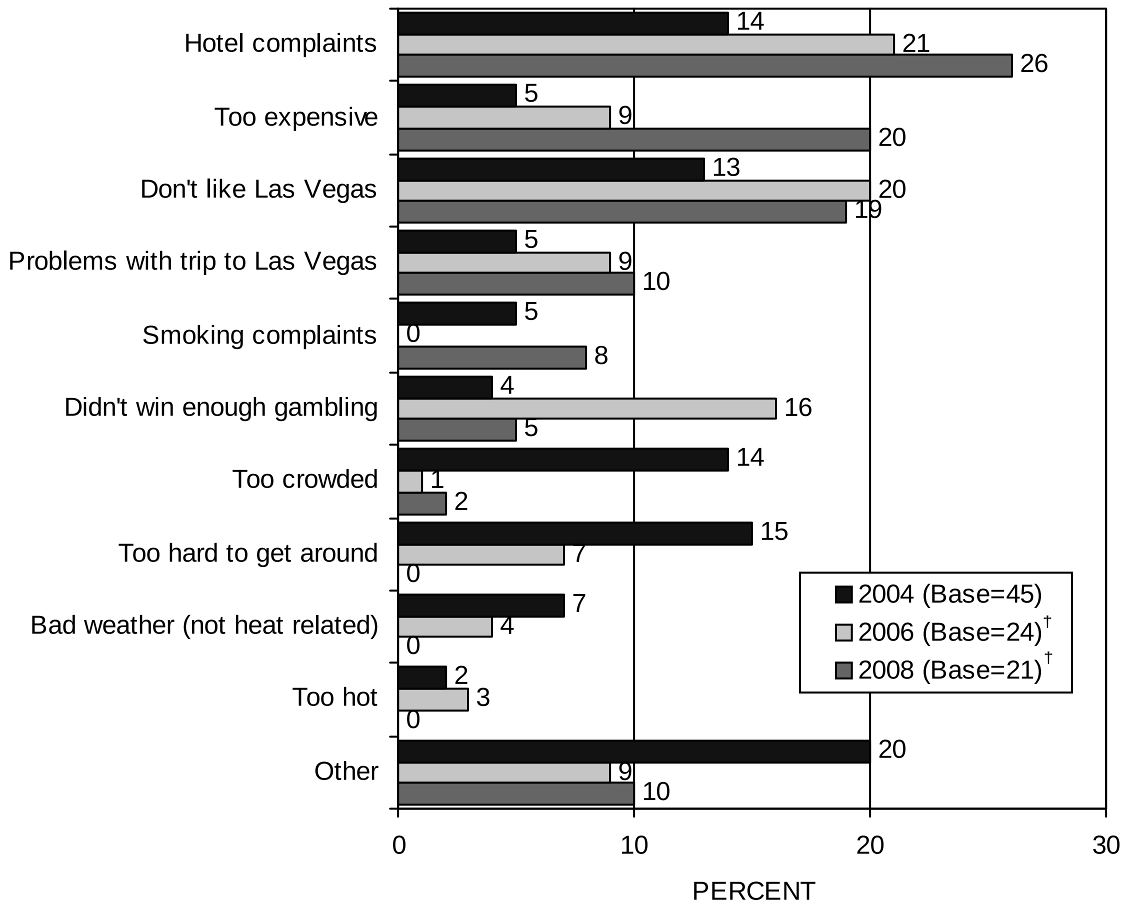
FIGURE 69
Why Not Completely Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied – Asked Every Other Year)



Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 69). Nearly one-quarter (23%) had complaints about their hotel. Among the other reasons given were Las Vegas is "too expensive" (14%), that their trip was too short (13%), "too hard to get around Las Vegas" (10%, down from 24% in 2004), that it was not a pleasure trip (8%), not winning enough gambling (7%, up significantly from 1% in 2004), and smoking complaints (5%).

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

FIGURE 70
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 (especially in both 2006 and 2008, when they represented less than 1% of all visitors who were interviewed). These few dissatisfied visitors were asked to volunteer why they were not satisfied with their visit (Figure 70). The most frequently mentioned reasons for being dissatisfied were hotel complaints (26%), Las Vegas is too expensive (20%, up significantly from 5% in 2004), "don't like Las Vegas" (19%), problems with trip to Las Vegas (10%), smoking complaints (8%), and not winning enough gambling (5%).

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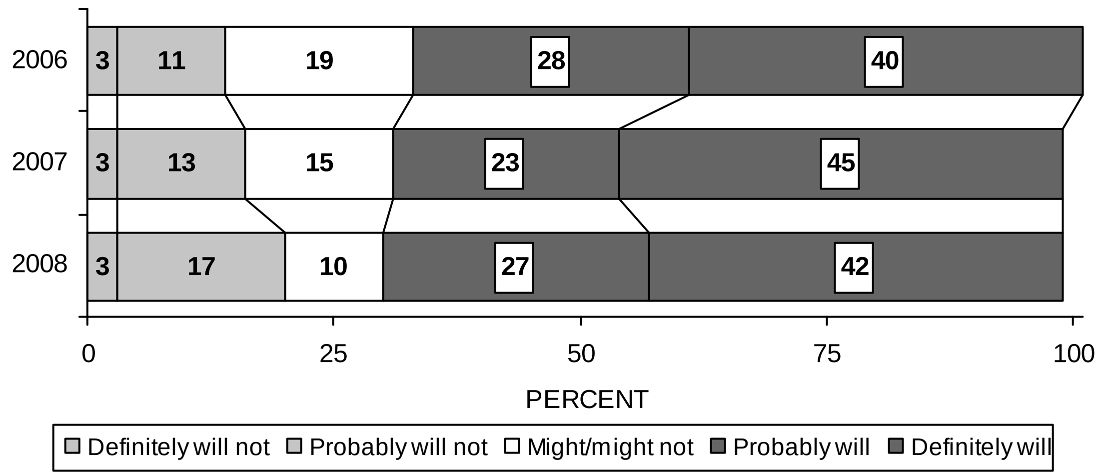
* This question is asked every other year and was not asked in 2005 or 2007.

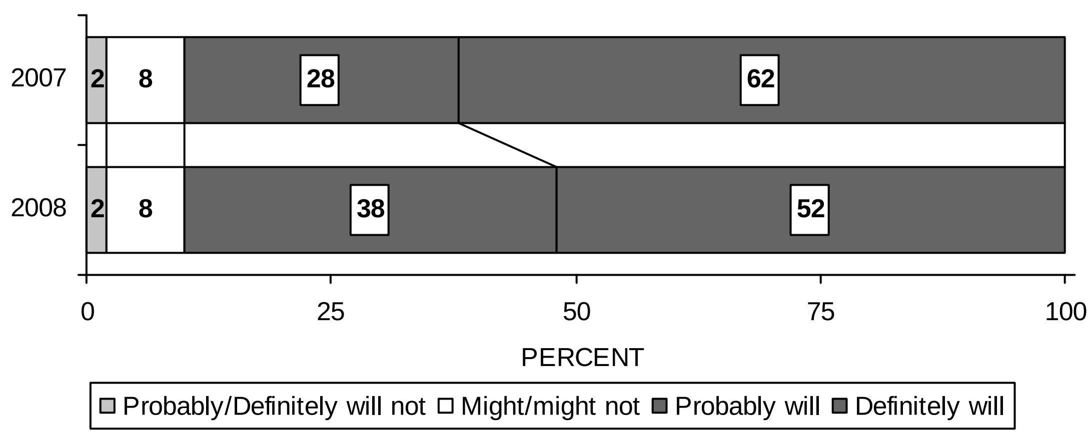
† Note very small base size for 2006 and 2008.

FIGURE 71
Likelihood of Returning to Las Vegas Next Year



Visitors were asked for the first time in 2006 how likely they are to return to Las Vegas the following year (Figure 71), and 69% of visitors in 2008 said they “definitely” or “probably” will.

FIGURE 72
Likelihood of Recommending Las Vegas to Others



In 2007 visitors were first asked how likely they are to recommend Las Vegas to others (Figure 72), and in 2008 52% said they “definitely” will recommend Las Vegas (down significantly from 62% last year), and 38% said they “probably” will recommend Las Vegas (up significantly from 28% in 2007).

VISITOR DEMOGRAPHICS

Visitors in 2008 were likely to be married (80%, similar to last year, but up from 73% in 2004 and 74% in 2005), earning $40,000 or more (83%, up significantly from 2004), and employed (66%, down significantly from 70% in 2006). Over one-quarter were retired (28%, up significantly from 24% in both 2005 and 2006). The proportion of visitors who were 40 years old or older stands at 76%, and the average age is 50.6, up from past years. More than one-half of visitors were from the western United States (52%), with the bulk of them coming from California (28%, down from 2004-2007). Fifteen percent (15%) of visitors were foreign, up from past years.

FIGURE 73
VISITOR DEMOGRAPHICS

	2004	2005	2006	2007	2008
GENDER					
Male	52%	51%	52%	50%	51%
Female	48	49	48	50	49
MARITAL STATUS					
Married	73	74	79	79	80
Single	17	16	14	14	13
Separated/Divorced	6	7	5	5	5
Widowed	4	3	2	3	2
EMPLOYMENT					
Employed	67	67	70	67	66
Unemployed	1	1	1	1	1
Student	3	3	2	2	2
Retired	26	24	24	26	28
Homemaker	3	5	4	4	4
EDUCATION					
High school or less	27	23	20	27	28
Some college	28	29	26	24	21
College graduate	42	44	48	44	45
Trade/vocational school	4	4	6	5	7
AGE					
21 to 29	13	13	12	11	10
30 to 39	16	20	19	18	15
40 to 49	21	21	22	22	21
50 to 59	21	20	21	20	22
60 to 64	12	11	9	9	11
65 or older	18	16	17	20	22
MEAN	49.0	47.7	48.0	49.0	50.6
BASE	(3300)	(3600)	(3599)	(3596)	(3601)

FIGURE 74

VISITOR DEMOGRAPHICS

	2004	2005	2006	2007	2008
ETHNICITY					
White	80%	83%	85%	86%	90%
African American/Black	6	4	4	5	4
Asian/Asian American	7	5	4	3	2
Hispanic/Latino	7	7	6	5	4
Other	0	1	1	1	0
HOUSEHOLD INCOME					
Less than $20,000	3	1	1	2	1
$20,000 to $39,999	13	6	6	8	5
$40,000 to $59,999	23	18	18	18	18
$60,000 to $79,999	21	24	21	21	24
$80,000 to $99,999	13	15	15	16	19
$100,000 or more	13	22	24	24	22
Not sure/no answer	15	14	15	10	12
VISITOR ORIGIN					
U.S.A.	87	88	87	88	85
Eastern states*	10	9	8	9	8
Southern states†	13	13	13	13	13
Midwestern states‡	17	14	14	14	12
Western states§	48	52	52	52	52
California	31	33	32	31	28
Southern California	27	29	27	25	24
Northern California	4	4	6	6	4
Arizona	6	6	7	9	9
Other Western states	11	13	12	13	15
No ZIP code given	0	0	0	0	0
Foreign	13	12	13	12	15
BASE	(3300)	(3600)	(3599)	(3596)	(3601)

* 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 2008

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...28
4-5...15
6-10...16
OVER 10...18
6.80 MEAN
3.00 MEDIAN

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

1 ....66%
2-3..23
4-5..8
6 OR MORE...................................3
1.79 MEAN
1.00 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....................... 11%
TO ATTEND A CORPORATE MEETING 1
TO GAMBLE.. 13
INCENTIVE TRAVEL PROGRAM 0
VACATION/PLEASURE................................. 39
VISIT FRIENDS/RELATIVES.......................... 11
TO ATTEND A SPECIAL EVENT 4
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 1%
OTHER BUSINESS PURPOSES 9
JUST PASSING THROUGH 6
WEDDING/TO GET MARRIED......................... 3
SOME OTHER REASON 2
NOT SURE/DK.. 0
REFUSED/NA 0

8. How important were each of the following in helping you decide to visit Las Vegas this time? Please use a 5-point scale where 1 means "not at all important" and 5 means "very important." (N=1410)

[RANDOMIZE ORDER]	NOT AT ALL IMPORTANT				VERY IMPORTANT	MEAN
a. The shopping	18%	22%	26%	21%	13%	2.89
b. The gambling	16	20	24	14	27	3.15
c. The shows and entertainment	7	18	31	32	13	3.26
d. The clubs and nightlife	43	22	20	8	7	2.16
e. The dining and restaurants	4	23	41	22	11	3.13
f. The golfing	90	5	2	1	2	1.19
g. The spas	79	12	6	2	2	1.36
h. Seeing the resorts	22	4	18	22	35	3.44

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

YES 12%
NO 88
NOT SURE/DK................ 0
REFUSED/NA 0

10. Were you MORE or LESS interested in attending this convention, trade show, or corporate meeting because it was held in Las Vegas, or did it make NO DIFFERENCE to you that it was held in Las Vegas? (N=443)

MORE INTERESTED..... 47%
LESS INTERESTED 1
NO DIFFERENCE.......... 52
NOT SURE/DK................. 0
REFUSED/NA 0

11. 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=443)

YES 35%
NO................................ 65
DK/NA 0

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

Air... 43%
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 48
Truck 1
Motorcycle...................................... 0
Recreational Vehicle (RV)............... 5

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

A.	Your own vehicle	48%
B.	Rental car	13
C.	Limousine	2
D.	Bus	21
E.	Hotel/motel shuttle	19
H	Monorail	11
G.	Taxi	25
	WALKED	31
	OTHER	0

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

SAME DAY	0%
1-3 DAYS BEFORE	3
4-6 DAYS BEFORE	1
7-14 DAYS BEFORE	11
15-30 DAYS BEFORE	22
31-60 DAYS BEFORE	24
61-90 DAYS BEFORE	16
MORE THAN 90 DAYS BEFORE	23
NOT SURE/DK	0
REFUSED/NA	0

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

YES	15%	**ASK Q16**
NO	85	**SKIP TO Q17**
NOT SURE/DK	0	
REFUSED/NA	0	

(ASK ONLY OF THOSE WHO SAID "YES" IN Q15.)

16. Did the travel agent... **(READ LIST)** (N=526)

Influence your decision to visit Las Vegas?	1%
Influence your choice of accommodations?	76
"Book" your accommodations?	87
"Book" your transportation?	94

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

YES	44%	**ASK Q18**
NO	56	**SKIP TO Q21**
NOT SURE/DK	0	
REFUSED/NA	0	

18. Did you use the Internet to book your transportation? (N=1596)

YES	59%	**ASK Q19**
NO	41	**SKIP TO Q20**
NOT SURE/DK	0	
REFUSED/NA	0	

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

(N=936)

a.	AOL (AMERICA ONLINE)	1%
b.	CHEAPTICKETS.	2
c.	EXPEDIA.COM	14
d.	HOTWIRE.COM	0
e.	MAPQUEST.COM	0
f.	ORBITZ	3
g.	PRICELINE.COM	2
h.	TRAVEL.COM	0
i.	TRAVELOCITY	7
j.	YAHOO	1
k.	AIRLINE WEBSITE (ANY)	68
l.	OTHER	2
m.	NOT SURE/DK	0

(ASK ONLY OF THOSE WHO SAID "YES" IN Q17.)

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

(N=1596)

a.	Influenced your decision to visit Las Vegas?	1%
b.	Influenced your choice of accommodations?	49

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.

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

YES 46%	**SKIP TO Q23**
NO 54	**ASK Q22**
NOT SURE/DK....0 REFUSED/NA....0	**SKIP TO Q23**

22. **(ASK ONLY IF "NO" IN Q21.)** Is there any particular reason why you did not visit Downtown Las Vegas? **(ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**

(N=1944)

- NOT ENOUGH TIME 33%
- UNFAMILIAR WITH DOWNTOWN 12
- DON'T LIKE DOWNTOWN/ BAD AREA 1
- ONLY INTERESTED IN STRIP....2
- NOT INTERESTED/ NO REASON TO....47
- INCONVENIENT/ OUT OF THE WAY 5
- OTHER 1
- NOT SURE/DON'T KNOW....0
- REFUSED/NO ANSWER....0

23. 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 88%
- MOTEL....6
- RV PARK 5
- FRIENDS/RELATIVES 1
- DAYTRIP/NO LODGING 0
- OTHER....0

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)

(N=3587)

- HOTEL 88%
- MOTEL....6
- RV PARK 5
- FRIENDS/RELATIVES 1
- OTHER....0

LOCATION OF LODGING
(ALL RESPONDENTS)

- STRIP CORRIDOR.... 73%
  - ON THE STRIP.... 56
  - JUST OFF THE STRIP.... 17
- DOWNTOWN.... 8
- BOULDER STRIP 5
- OUTLYING AREAS 12
- OTHER.... 2

LOCATION OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)

(N=3587)

- STRIP CORRIDOR.... 74%
  - ON THE STRIP.... 57
  - JUST OFF THE STRIP.... 17
- DOWNTOWN.... 8
- BOULDER STRIP 5
- OUTLYING AREAS 13
- OTHER.... 1

IF RESPONSE TO Q23 IS FRIENDS & RELATIVES OR DAY TRIP, SKIP TO Q34. ALL OTHERS ANSWER Q24.

24. At what point in your planning did you decide where you would stay? (N=3587)

BEFORE LEAVING HOME 96%
WHILE EN ROUTE TO LAS VEGAS 2
AFTER ARRIVAL 2
NOT SURE/DK 0
REFUSED/NA 0

IF RESPONSE TO Q23 IS RV, SKIP TO Q33. ALL OTHERS ANSWER Q25.

25. 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=34 69)

Booked by phone, calling the hotel, motel, or RV park directly .... 52% Booked through a travel agent (either in person or by phone) ...... 13 Booked by phone but not by calling the hotel directly and not through a travel agent 4	**SKIP TO Q27**
Booked at a website on the Internet 25	**ASK Q26**
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 .... 2 OTHER (SPECIFY:) .... 0 REFUSED/NA 0	**SKIP TO Q27**

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

(N=861)

a. HOTEL WEBSITE (ANY) 23%
b. HOTELS.COM 20
c. EXPEDIA.COM 19
d. LAS VEGAS.COM 8
e. TRAVELOCITY 6
f. AIRLINE WEBSITE 3
g. ORBITZ 4
h. CHEAPTICKETS. 1
i. PRICELINE.COM 2
j. VEGAS.COM 4
k. YAHOO 1
l. AOL (AMERICA ONLINE) 1
m. OTHER 9
n. NOT SURE/DK 0

27. 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=3469)

SAME DAY 4%
1-3 DAYS BEFORE 2
4-6 DAYS BEFORE 2
7-14 DAYS BEFORE 17
15-30 DAYS BEFORE 39
31-60 DAYS BEFORE 22
61-90 DAYS BEFORE 6
MORE THAN 90 DAYS BEFORE 9
NOT SURE/DK 0
REFUSED/NA 0

28. Including yourself, how many people stayed in your room? (N=3362)

ONE 13%
TWO 73
THREE 8
FOUR 5
FIVE 1
SIX OR MORE 0
REFUSED/NA 0
2.06 MEAN
2.00 MEDIAN

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

(N=3284)

HOTEL/TRANSPORTATION PACKAGE DEAL .... 13% HOTEL/AMENITIES PACKAGE DEAL .... 1 TOUR/ TRAVEL GROUP 1	**ASK Q30**
CONVENTION GROUP/ COMPANY MEETING ...... 7 CASINO RATE .... 5 REGULAR FULL-PRICE ROOM RATE 32	**SKIP TO Q32**
CASINO COMPLIMENTARY 17	**SKIP TO Q34**
ANOTHER RATE 25	**SKIP TO Q32**

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

(N=485)

$0-$99 .... 3%
$100-$199 3
$200-$299 2
$300-$399 11
$400-$499 19
$500-$999 42
$1000 OR MORE 20
NOT SURE/REFUSED 0
$746.69 MEAN
$600.00 MEDIAN

31. Where did you first hear about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=485)

NEWSPAPER 6%
TELEVISION 0
TRAVEL AGENT 47
WORD OF MOUTH 6
OFFER RECEIVED IN THE MAIL 0
BROCHURE 0
E-MAIL OFFER 0
INTERNET AD 13
ANY WEBSITE 25
RESERVATION AGENT/ CALL CENTER 2
OTHER 0
NOT SURE/NO ANSWER 0

PACKAGE VISITORS SKIP TO Q34

32. **(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=2254)

$0-$35 .... 4%
$36-$50 12
$51-$100 50
$101 OR MORE 34
NOT SURE/REFUSED 1
$101.68 MEAN
$90.00 MEDIAN

33. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=2254)

NEWSPAPER	0%
TELEVISION	0
RADIO	0
TRAVEL AGENT	8
WORD-OF-MOUTH	7
OFFER RECEIVED IN THE MAIL	6
BROCHURE	2
E-MAIL OFFER	2
INTERNET AD (POP-UP OR BANNER AD)	5
ANY WEBSITE	29
OUTDOOR BILLBOARD	0
RESERVATION AGENT/ CALL CENTER	41
OTHER	0
NOT SURE/DK	0

34. **(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	68
3	7
4	10
5 OR MORE	4
2.37	MEAN
2.00	MEDIAN

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

YES	6%
NO	94

36. 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	8
2	22
3	28
4	21
5 OR MORE	22
3.54	MEAN
3.00	MEDIAN

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

1	0%
2	8
3	22
4	28
5	21
6 OR MORE	22
4.54	MEAN
4.00	MEDIAN

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

SUNDAY	17%
MONDAY	14
TUESDAY	12
WEDNESDAY	14
THURSDAY	15
FRIDAY	17
SATURDAY	12

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

0	1%
1	10
2	9
3	9
4	12
5	12
6	11
7 TO 10	26
MORE THAN 10	11
6.15	MEAN
5.00	MEDIAN

40. At how many of these casinos or casino-hotel properties did you gamble? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)**

0 .... 15%
1 20
2 19
3 13
4 10
5 8
6 6
7 TO 10 7
MORE THAN 10 2
3.02 MEAN
2.00 MEDIAN

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

YES 85%	**ASK Q42**
NO 15	**SKIP TO Q45**

42. At what point in your planning did you decide where you would gamble? (N=3060)

BEFORE LEAVING HOME 35%
WHILE EN ROUTE TO LAS VEGAS 2
AFTER ARRIVAL 63
NOT SURE/DK 0
REFUSED/NA 0

43. 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=3060)

2 OR LESS 47%
LESS THAN 1 HOUR 17
ONE HOUR 10
TWO HOURS 20
3 TO 4 25
5 TO 6 17
7 TO 8 8
9 TO 10 3
MORE THAN 10 1
3.28 MEAN
3.00 MEDIAN

44. 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=3060)

$0-$99 .... 15%
$100-$199 17
$200-$299 13
$300-$399 10
$400-$499 5
$500-$599 13
$600 OR MORE 22
NOT SURE/REFUSED 5
$531.98 MEAN
$300.00 MEDIAN

45. **(ASKED ONLY OF THOSE WHO DID NOT GAMBLE:)** People have many different reasons for choosing not to gamble. What is the *MAIN* reason you did not to gamble during this visit to Las Vegas? **(ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE.)** (N=541)

NOT INTERESTED/ IT'S BORING/NO FUN 39%
DON'T LIKE LOSING/ WASTING MONEY 22
NOT ENOUGH TIME/NO TIME 13
CAN'T AFFORD IT 7
RELIGIOUS OBJECTIONS 5
TOO RISKY/ ODDS ARE AGAINST YOU 5
DON'T LIKE THE GAMBLING ENVIRONMENT 4
IT'S A BAD HABIT 2
HAVE CHILDREN WITH US 2
OTHER 1
NOT SURE/NO ANSWER 0

46. **(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................10%
4 -SOMEWHAT MORE LIKELY 28
3 -NO DIFFERENCE 62
2 -SOMEWHAT LESS LIKELY..........1
1 -MUCH LESS LIKELY 0
NOT SURE/DK 0
REFUSED/NA....................................0
3.48 MEAN
3.00 MEDIAN

47. 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.)**

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

	Q47				Q48	
	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.)	13%	87%	0%	0%	1.07	(N=457)
B. Comedy shows or revues (for example, Improv, Comedy Stop, etc.)	10	90	0	0	1.06	(N=370)
C. Lounge acts or other kinds of free entertainment provided at a location other than the "main" show room	54	46	0	0	1.81	(N=1939)

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

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

50. At what point in your planning did you decide which shows you would see?

(N=2609)
BEFORE LEAVING HOME....... 29%
WHILE EN ROUTE TO LAS VEGAS................................ 0
AFTER ARRIVAL...................... 71
NOT SURE/DK 0
REFUSED/NA............................. 0

51. **(ASK THOSE WHO DID NOT GO TO SHOWS:)** What was the *main* reason you didn't go to *any* shows, revues, or acts during your stay in Las Vegas? **(ACCEPT ONLY ONE RESPONSE.)** (N=992)

TOO BUSY/NO TIME	60%
NOT INTERESTED	19
CAME TO GAMBLE	8
ALREADY SAW SHOWS	4
TOO EXPENSIVE	5
DON'T LIKE TO GO ALONE	2
HAVE CHILDREN WITH US	1
COULDN'T GET TICKETS	1
OTHER MENTIONS	1

52. 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	21%
NO	79
NOT SURE/DK	0
REFUSED/NA	0

53. 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?	49
D.	Any free-standing bar or lounge without a cover charge?	1

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

YES	14%
NO	86

55. **(ASK THOSE WHO VISITED NEARBY PLACES:)** On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=510)

Hoover Dam	64%
Grand Canyon	50
Lake Mead	31
Laughlin	6
Zion National Park	14
Death Valley	3
Bryce Canyon	10
Red Rock Canyon	8
Primm. NV	2
Mt. Charleston/Lee Canyon	3
Valley of Fire	4
Mesquite, NV	3
All other responses	2

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

YES	4%
NO	96

57. 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.)**

$273.39 MEAN (INCLUDING $0)
$273.39 MEAN (EXCLUDING $0)

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

$59.26 MEAN (INCLUDING $0)
$90.47 MEAN (EXCLUDING $0)

58. 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)	$121.90	MEAN (INCLUDING $0)
		$199.28	MEAN (EXCLUDING $0)
B.	Shows/entertainment (not including gambling)	$51.64	MEAN (INCLUDING $0)
		$117.55	MEAN (EXCLUDING $0)
C.	Sightseeing	$7.12	MEAN (INCLUDING $0)
		$138.95	MEAN (EXCLUDING $0)
X.	Other	$5.84	MEAN (INCLUDING $0)
		$295.90	MEAN (EXCLUDING $0)

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

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

Very satisfied	93%
Somewhat satisfied	7
Somewhat dissatisfied	1
Very dissatisfied	0
DO NOT READ	
NOT SURE/DK	0
REFUSED/NA	0

60. **(AS OF THOSE WHO WERE “SOMEWHAT” SATISFIED:)**
You just said you were *somewhat* satisfied with your overall experience in Las Vegas. What is the *MAIN* reason that keeps you from saying you were *very* satisfied? (N=242)

Hotel complaints	23%
Too expensive	14
Trip was too short	13
Too hard to get around	10
Here for business, not pleasure/ not enough free time	8
Gambling complaints	7
Too crowded	6
Smoking complaints	5
Don’t like Las Vegas	4
Problems with trip to Las Vegas	3
Restaurant complaints	2
Too hot	2
Bad weather (other than heat)	1
Other	3

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

(N=21)

- Hotel complaints 26%
- Too expensive 20
- Don't like Las Vegas 19
- Problems with trip to Las Vegas 10
- Smoking complaints 8
- Gambling complaints 5
- Too many people passing out porn 5
- Nothing to do but gamble 3
- Rude/unfriendly people 2
- Too crowded 2

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

- Definitely will (5) 42%
- Probably will (4) 27
- Might/might not (3) 10
- Probably will not (2) 17
- Definitely will not (1) 3
- NOT SURE/NO ANSWER 0

63. 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) 52%
- Probably will recommend (4) 38
- Might/might not recommend (3) 8
- 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.

---

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

Employed 66%	**ASK Q65**
Unemployed .... 1 Student .... 2 Retired .... 28 Homemaker 4	**SKIP TO Q66**
DO NOT READ REFUSED/NA 0	**SKIP TO Q66**

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

(N=2360)

- Professional/technical 26%
- Managers/proprietors 20
- Sales/clerical 27
- Craft workers 8
- Service workers 18
- Laborers (non-agricultural) 1
- Agricultural 1

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

GRADE SCHOOL OR SOME HIGH SCHOOL........................1%
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12).....................27
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 21
GRADUATED COLLEGE..................35
GRADUATE SCHOOL (MASTER'S OR PH.D.) 10
TECHNICAL, VOCATIONAL, OR TRADE SCHOOL..........................7
REFUSED/NA......................................0

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

Married... 80%
Single.. 13
Separated or divorced 5
Widowed 2
REFUSED/NA...................................... 0

68. What country do you live in?

USA 85%	**ASK Q69**
FOREIGN 15	**SKIP TO Q70**

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

EAST 8%
SOUTH 13
MIDWEST 12
WEST 52
  CALIFORNIA...................................28
    NORTHERN CA. 4
    SOUTHERN CA. 24
  ARIZONA 9
  OTHER WEST 15
FOREIGN VISITORS 15

70. **(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...90%
BLACK OR AFRICAN AMERICAN.......4
ASIAN OR ASIAN AMERICAN.............2
HISPANIC/LATINO 4
NATIVE AMERICAN, MIXED RACE, OTHER 0

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

50.58 MEAN
51.00 MEDIAN

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

21 to 29 ....10%
30 to 39 15
40 to 49 21
50 to 59 22
60 to 64 11
65 and older 22
REFUSED/NA.......................................0

72. 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........................2
C. $30,000 to $39,999........................3
D. $40,000 to $49,999........................7
E. $50,000 to $59,999......................10
F. $60,000 to $69,999......................12
G. $70,000 to $79,999......................12
H. $80,000 to $89,999......................13
I. $90,000 to $99,999........................7
J. $100,000 to $149,999...................21
K. $150,000 or more 1
NOT SURE/NO ANSWER 12

CARD A

HOTEL/MOTEL RATES

1. **<u>HOTEL/TRANSPORTATION PACKAGE DEAL</u>**
   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. **<u>HOTEL/AMENITIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)*</u>**
   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. **<u>TOUR/TRAVEL GROUP</u>**
   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. **<u>CONVENTION GROUP/COMPANY MEETING</u>**
   Arranged through an employer or convention.

5. **<u>CASINO RATE</u>**
   Special reduced rate arranged through a casino host or casino employee.

6. **<u>REGULAR FULL-PRICE ROOM RATE</u>**
   Full price, no discounts.

7. **<u>CASINO COMPLIMENTARY</u>**
   Room is free of charge.

8. **<u>ANOTHER RATE</u>**
   Any other special room rate not shown above.

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* This option was added in 2004.

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

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

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