

# **LAS VEGAS VISITOR PROFILE**

**Calendar Year 2008**

***Airline Visitor Version***

Research that works.

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## VISITOR PROFILE STUDY

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# TABLE OF CONTENTS

	<u>Page</u>
EXECUTIVE SUMMARY .....	1
INTRODUCTION .....	14
METHODOLOGY .....	15
SUMMARY OF FINDINGS	
Reasons For Visiting .....	17
Travel Planning .....	29
Trip Characteristics And Expenditures .....	45
Gaming Behavior And Budgets .....	64
Entertainment.....	73
Attitudinal Information .....	81
Visitor Demographics .....	85

## TABLE OF FIGURES

	<u>Page</u>
<u>REASONS FOR VISITING</u>	
FIGURE 1: First Visit Vs. Repeat Visit .....	17
FIGURE 2: Frequency Of Visits In Past Five Years .....	18
FIGURE 3: Frequency Of Visits In Past Five Years (Repeat Visitors) .....	19
FIGURE 4: Frequency Of Visits In Past Year.....	20
FIGURE 5: Frequency Of Visits In Past Year (Repeat Visitors).....	21
FIGURE 6: Primary Purpose Of Current Visit .....	22
FIGURE 7: Primary Purpose Of Current Visit (Repeat Visitors).....	23
FIGURE 8: Primary Purpose Of Current Visit (First-Time-Visitors) .....	24
FIGURE 9: Importance Of Factors In Deciding To Visit Las Vegas (Among Vacation/Pleasure Visitors) .....	25
FIGURE 10: Conventions/Trade Shows/Corporate Meetings .....	26
FIGURE 11: Interest In Attending Conventions, Trade Shows, Or Corporate Meetings In Las Vegas .....	27
FIGURE 12: Whether Brought Someone Else Who Did Not Attend Conventions, Trade Shows, Or Corporate Meetings In Las Vegas .....	28
<u>TRAVEL PLANNING</u>	
FIGURE 13: Advance Travel Planning.....	29
FIGURE 14: Local Transportation.....	30
FIGURE 15: When Decided Where To Stay .....	31
FIGURE 16: When Decided Where To Gamble.....	32
FIGURE 17: When Decided Which Shows To See.....	33
FIGURE 18: Travel Agent Assistance.....	34
FIGURE 19: Travel Agent Influence And Use.....	35
FIGURE 20: Whether Used The Internet To Plan Trip.....	36
FIGURE 21: Internet Influence And Use .....	37
FIGURE 22: Web Site Used To Book Transportation .....	38
FIGURE 23: Web Site Used To Book Accommodations.....	39
FIGURE 24: Whether Visited Downtown Las Vegas.....	40
FIGURE 25: Main Reason For Visiting Downtown Las Vegas.....	41
FIGURE 26: Main Reason For Not Visiting Downtown Las Vegas .....	42
FIGURE 27: Visits To Nearby Places .....	43
FIGURE 28: Other Nearby Places Visited .....	44

# TABLE OF FIGURES

(Continued/2)

	<u>Page</u>
<u>TRIP CHARACTERISTICS AND EXPENDITURES</u>	
FIGURE 29: Adults In Immediate Party.....	45
FIGURE 30: Whether Has Persons In Party Under Age 21 .....	46
FIGURE 31: Nights Stayed .....	47
FIGURE 32: Days Stayed .....	47
FIGURE 33: Day Of Arrival .....	48
FIGURE 34: Type Of Lodging .....	49
FIGURE 35: Location Of Lodging.....	50
FIGURE 36: How Booked Accommodations In Las Vegas .....	51
FIGURE 37: Advance Booking Of Accommodations.....	52
FIGURE 38: Type Of Room Rates .....	53
FIGURE 39: Package Purchasers.....	54
FIGURE 40: Cost of Package Per Person.....	55
FIGURE 41: Where First Heard About The Package .....	56
FIGURE 42: Lodging Expenditures — Average Per Night .....	57
FIGURE 43: How First Found Out About Room Rate .....	58
FIGURE 44: Number Of Room Occupants.....	59
FIGURE 45: Average Trip Expenditures On Food & Drink — And On Local Transportation (Including Visitors Who Spent Nothing) .....	60
FIGURE 46: Average Trip Expenditures On Food & Drink — And On Local Transportation (Among Spenders) .....	61
FIGURE 47: Average Trip Expenditures On Shopping, Shows, and Sightseeing (Including Visitors Who Spent Nothing).....	62
FIGURE 48: Average Trip Expenditures On Shopping, Shows, and Sightseeing (Among Spenders).....	63
<u>GAMING BEHAVIOR AND BUDGETS</u>	
FIGURE 49: Whether Gambled While In Las Vegas.....	64
FIGURE 50: Hours Of Gambling — Average Per Day .....	65
FIGURE 51: Casino Game Played Most Often .....	66
FIGURE 52: Number Of Casinos Visited.....	67
FIGURE 53: Number Of Casinos Where Gambled .....	68
FIGURE 54: Main Reason For Not Gambling .....	69
FIGURE 55: Trip Gambling Budget.....	70
FIGURE 56: Where Visitors Gambled.....	71
FIGURE 57: Likelihood Of Visiting Las Vegas With More Places To Gamble Outside Las Vegas .....	72

# TABLE OF FIGURES

(Continued/3)

	<u>Page</u>
<u>ENTERTAINMENT</u>	
FIGURE 58: Entertainment Attendance .....	73
FIGURE 59: Types Of Entertainment.....	74
FIGURE 60: Average Number Of Shows Attended.....	75
FIGURE 61: Main Reason For Not Attending Any Shows .....	76
FIGURE 62: Whether Has Been To Other Paid Attractions .....	77
FIGURE 63: Whether Has Been To Nightclubs, Bars, And Lounges .....	78
FIGURE 64: Whether Played Golf .....	79
FIGURE 65: Whether Visited A Spa .....	80
<u>ATTITUDINAL INFORMATION</u>	
FIGURE 66: Satisfaction With Visit .....	81
FIGURE 67: Why Not Completely Satisfied With Visit .....	82
FIGURE 68: Likelihood Of Returning To Las Vegas Next Year .....	83
FIGURE 69: Likelihood Of Recommending Las Vegas To Others.....	84
<u>VISITOR DEMOGRAPHICS</u>	
FIGURE 70: Visitor Demographics .....	86
FIGURE 71: Visitor Demographics .....	87

## EXECUTIVE SUMMARY

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

This report presents the findings from the 3,600 personal interviews conducted by GLS Research throughout calendar year 2008.

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.

The focus of this report is an analysis of airline visitors compared to those who arrived by ground transportation. These two subgroups are defined as including visitors who arrived by:

- **AIRLINE** — those who arrived in Las Vegas by regularly scheduled, charter, or private airline — 43% of all visitors.
- **GROUND TRANSPORTATION** — those who arrived in Las Vegas by automobile, RV, truck, motorcycle, or bus — 57% of all visitors.

This section presents the research highlights. The findings are presented in detail beginning on page 17.

***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 entire 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

- Sixteen percent (16%) of visitors were first-time visitors to Las Vegas, and eighty-four percent (84%) were repeat visitors. Airline visitors were significantly more likely to be making their first trip to Las Vegas (23%) than those who arrived by ground transportation (10%).
- The mean (average) number of visits to Las Vegas during the past five years was significantly higher for those who arrived by ground transportation (mean of 8.5) than for airline visitors (mean of 4.5).
- Looking at repeat visitors, the mean (average) number of visits to Las Vegas during the past five years was significantly higher for those who arrived by ground transportation (mean of 9.4) than for airline visitors (mean of 5.5).
- Airline visitors (81%) were significantly more likely than those who traveled to Las Vegas by ground transportation (54%) to have visited only once in the past year. The mean (average) number of visits over the past year was significantly higher for those who arrived by ground transportation (2.1) than it was for airline visitors (1.4).
- Among respondents who had visited Las Vegas before, airline visitors (75%) were significantly more likely than those who traveled to Las Vegas by ground transportation (49%) to have visited only once in the past year. The mean (average) number of visits was significantly higher for those who arrived by ground transportation (2.2) than it was for airline visitors (1.5).
- Looking at the primary purpose of the *current visit* among all visitors, airline visitors (47%) were significantly more likely than those who arrived by ground transportation (34%) to say the primary purpose of their current trip was for vacation or pleasure. Airline visitors were also significantly more likely than those who arrived by other means to say that the primary purpose of their current trip was to attend a convention or corporate meeting (18% vs. 8%). Visitors who arrived by ground transportation were significantly more likely than airline visitors to say they visited Las Vegas

primarily to gamble (15% vs. 11%), to visit friends or relatives (13% vs. 9%), for business purposes other than a convention or corporate meeting (11% vs. 7%), were in Las Vegas for a special event (5% vs. 3%), or were just passing through (9% vs. 1%).

- Looking only at those who had been to Las Vegas before, airline visitors (43%) were significantly more likely than those who arrived by other means (32%) to say they were visiting for vacation or pleasure. Airline visitors (19%) were also significantly more likely than those who arrived by other means (8%) to say their current visit had been primarily to attend a convention or corporate meeting. Visitors who arrived by ground transportation were significantly more likely than airline visitors to say their current visit had been to visit friends or relatives (14% vs. 9%), for business purposes other than a convention or corporate meeting (11% vs. 7%), for a special event (6% vs. 4%), or to say that they were just passing through Las Vegas (8% vs. 1%).
- We also looked at the purpose of the current visit among those who were making their first trip to Las Vegas. Airline visitors were significantly more likely than those who arrived by ground transportation to say their current visit was for a convention or corporate meeting (14% vs. 3%). Visitors who arrived by ground transportation (17%) were more likely than airline visitors (1%) to say they were just passing through.
- Vacation and pleasure visitors were asked to rate the importance of several factors in helping them decide to visit Las Vegas. Ratings were done using a five-point scale where one meant “not at all important” and five meant “very important.” Visitors who arrived by air place greater importance than visitors who arrived by ground transportation on shows and entertainment (mean score of 3.5 vs. 3.0), seeing the resort properties (3.6 vs. 3.2), and shopping (3.1 vs. 2.7).
- Respondents were asked if they had attended a convention, trade show, or corporate meeting while they were in Las Vegas. Airline visitors (18%) were significantly more likely than those who arrived by ground transportation (8%) to say they had.

- Convention visitors were asked if holding a convention in Las Vegas made them more or less interested in attending the convention — or if it made no difference. Forty-seven percent (47%) said having the convention in Las Vegas made them more interested in attending, while 52% said it made no difference. There were no significant differences between the subgroups on this measure.
- 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. There were no statistically significant differences between the subgroups on this question.

## TRAVEL PLANNING

- Airline visitors tended to plan their trip farther in advance than did visitors who arrived in Las Vegas by ground transportation. For example, 76% of airline visitors planned their trip more than one month in advance, compared to 54% of those who arrived by ground transportation.
- As might be expected, airline visitors were much more likely than those who arrived in Las Vegas by ground transportation to use a variety of local transportation options to get around Las Vegas during their visit, including taxis (51% vs. 6%), hotel and motel shuttles (39% vs. 4%), rental cars (22% vs. 7%), the Monorail (18% vs. 6%), buses (31% vs. 12%), and limousines (4% vs. 0%). Airline visitors were also more likely than those who arrived by ground transportation to say they had walked around Las Vegas (36% vs. 28%).
- Most visitors (98%) decided where to stay before arriving in Las Vegas. Visitors who arrived by ground transportation (4%) were significantly more likely than airline visitors (1%) to say they decided where to stay after arrival.
- Most visitors (63%) decided where to gamble after arriving in Las Vegas. Airline visitors (72%) were significantly more

likely than those who arrived by ground transportation (55%) to say they decided where to gamble after arrival.

- While most visitors (71%) decided which shows to see after arrival, three in ten (29%) decided before leaving home. There were no significant differences between airline visitors and those who arrived by ground transportation on this measure.
- Fifteen percent (15%) of visitors to Las Vegas said they used a travel agent to help plan their trip. A significantly higher proportion of airline visitors (27%) used the assistance of a travel agent to plan their trip to Las Vegas compared to those who traveled by ground transportation (5%).
- Among visitors who used a travel agent, nearly all (99%) airline visitors said the agent booked their transportation to Las Vegas, compared to a significantly smaller 77% of those who arrived by ground transportation. Overall 87% of visitors who used a travel agent said the travel agent booked their accommodations, 76% said the travel agent influenced their choice of accommodations, and 1% said the travel agent influenced their decision to visit Las Vegas.
- Visitors were asked if they used the Internet to plan their trip, and 44% said they had done so. Airline visitors (66%) were significantly more likely to use the Internet to plan their trip than visitors who arrived by ground transportation (28%).
- Among those who said they used the Internet to plan their trip, airline visitors (87%) were far more likely than those who arrived by ground transportation (7%) to say they used the Internet to book their transportation to Las Vegas. Visitors who arrived by ground transportation, however, were significantly more likely than airline visitors to say they found information on the Internet that influenced their choice of accommodations (60% vs. 42%).
- Airline visitors who booked their transportation online were most likely to say they had used an airline website (68%), followed at a distance by Expedia (14%), Travelocity (8%), and Orbitz (3%). A smaller number of airline visitors used other websites. Visitors who arrived by ground transportation but booked transportation online were most

likely to say they used an airline website (81%) followed by Expedia (15%).

- Visitors who booked their accommodations online and arrived by ground transportation were significantly more likely than airline visitors to say they used a hotel website (31% vs. 18%) or Hotels.com (25% vs. 16%) to book their accommodations. Airline visitors were significantly more likely than those who arrived by ground transportation to say they used Expedia (23% vs. 13%), or Travelocity (8% vs. 1%).
- Airline visitors (51%) were significantly more likely than those who arrived by ground transportation (42%) to say they visited Downtown Las Vegas.
- Visitors who did not visit Downtown were asked to volunteer why. Those who arrived by ground transportation (54%) were more likely than airline visitors (37%) to say they were not interested in Downtown. Airline visitors were significantly more likely than those who arrived by ground transportation to say they did not have time (36% vs. 30%) or that they were unfamiliar with Downtown (20% vs. 7%).
- Visitors were asked if they visited any nearby places before or after their trip to Las Vegas. Overall 14% said they had visited nearby places, with no significant difference between airline visitors and those who arrived by ground transportation.
- Visitors were asked what other nearby destination they had visited, or planned to visit. Airline visitors were more likely than those who arrived by ground transportation to visit Lake Mead (37% vs. 27%) or Red Rock (13% vs. 4%), but less likely to visit Zion National Park (6% vs. 19%), Bryce Canyon (4% vs. 13%), or Mesquite (0% vs. 5%).

## **TRIP CHARACTERISTICS AND EXPENDITURES**

- The majority of all visitors (68%) traveled in parties of two. The average party size was 2.4 people, with no significant difference between airline visitors and those who arrived by ground transportation.

- Six percent (6%) of visitors said they were traveling with people under the age of 21 in their party. Airline visitors (3%) were significantly less likely than visitors who arrived by ground transportation (9%) to say there were people under the age of 21 in their party.
- Airline visitors stayed significantly longer in Las Vegas (average of 4.3 nights and 5.3 days) than those who arrived by ground transportation (3.0 nights and 4.0 days).
- All respondents were asked on what day of the week they arrived in Las Vegas. Visitors were most likely to arrive on a Sunday or a Friday (17% each). There were no significant differences between airline visitors and those who arrived by ground transportation on this measure.
- Airline visitors (97%) were significantly more likely than those who arrived by ground transportation (82%) to have stayed in a hotel, and less likely than those who arrived by ground transportation to have stayed in a motel (3% vs. 8%) or at an RV park (less than 1% vs. 9%).
- In terms of lodging location, airline visitors (87%) were significantly more likely than those who arrived by ground transportation (64%) to stay at a property on the Strip Corridor\*. Those who arrived by ground transportation were more likely than airline visitors to say they stayed Downtown (9% vs. 6%), on the Boulder Strip (8% vs. 1%), or in outlying areas (17% vs. 6%).
- Visitors who stayed at a hotel, motel, or in an RV park were asked how they, or someone in their party, booked their accommodations in Las Vegas for their most recent trip. Airline visitors were significantly more likely than those who arrived by ground transportation to say they had booked their accommodations either online at a website (36% vs. 17%) or through a travel agent (25% vs. 5%). By contrast, those who arrived by ground transportation were more likely than airline visitors to say they called the property directly (66% vs. 32%), or booked their accommodations in person (7% vs. less than 1%).

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

- Airline visitors booked their accommodations further in advance than those who arrived by ground transportation. For example, 53% of airline visitors booked their accommodations more than a month in advance compared to 25% of those who arrived by ground transportation. Visitors who arrived by ground transportation were more likely than airline visitors to have booked their accommodations a month or less before their arrival (76% vs. 46%).
- Looking at the type of room rates received by hotel/motel lodgers, visitors who arrived by ground transportation were significantly more likely than airline visitors to have paid a regular room rate (39% vs. 23%), a casino complimentary rate (19% vs. 13%), or to have paid some other kind of rate (27% vs. 22%). As might be expected, airline visitors (27%) were much more likely than those who arrived by ground transportation (3%) to say their accommodations were part of a package deal. Airline visitors were also more likely than those who arrived by ground transportation to say they paid a convention rate (10% vs. 5%).
- Airline visitors were significantly more likely than those who arrived by ground transportation to be visiting Las Vegas as part of a tour group or package deal (27% vs. 4%).
- We asked those who purchased either a hotel or a tour/travel group package how much their package cost per person. The average package cost was \$746.69. The difference between the cost for airline visitors (\$741.09) and those who traveled to Las Vegas by other means (\$777.88) was not statistically significant.
- Package purchasers were asked where they first heard about the package they bought. Overall, nearly one-half (47%) of visitors first heard about their rate through a travel agent, 25% on a website, and 13% through an internet ad. Those who arrived by ground transportation were more likely than airline visitors to have first heard about the package by word-of-mouth (30% vs. 2%), while those who arrived by air were more likely than those who arrived by ground transportation to have first heard of the package at a website (30% vs. 0%).

- We looked at lodging expenditures among visitors whose room was *not* part of a travel package. Airline visitors paid significantly more for lodging (average of \$114.57) than those who arrived by ground transportation (\$93.32).
- Visitors were asked how they first found out about the room rate they paid. Airline visitors were significantly more likely than those who arrived by ground transportation to say they initially found out about their room rate through a website (33% vs. 26%), through a travel agent (16% vs. 3%), through word of mouth (10% vs. 6%), or through an Internet ad (7% vs. 4%). Those who arrived by ground transportation were more likely than airline visitors to say they first found out about the rate through a reservations agent (51% vs. 25%).
- Looking only at visitors who stayed in a hotel or motel, airline visitors (78%) were significantly more likely than those who arrived by ground transportation (69%) to say two people stayed in their room. Airline visitors were also more likely than those who arrived by ground transportation to say they were staying alone (15% vs. 12%). By contrast, those who arrived by ground transportation were more likely than airline visitors to say three or more people stayed in their room (20% vs. 6%). The average number of room occupants was significantly greater for those who arrived by ground transportation (average of 2.2 room occupants) than for airline visitors (1.9).
- We examined the average trip expenditures on food and drink and on local transportation *including visitors who said they spent nothing in these categories*. The average expenditures for food and drink was significantly higher for airline visitors (\$352.58) than for those who arrived by ground transportation (\$213.71). Similarly, the average expenditures for local transportation was significantly greater for airline visitors (\$107.58) than for those who arrived by ground transportation (\$22.89).
- Looking only at *visitors who actually spent money* in these categories, airline visitors spent significantly more on food and drink (average trip expenditures of \$352.58) and local transportation (\$109.52) than those who arrived by ground transportation (\$213.71 for food and drink and \$56.00 for local transportation).

- We also examined the average per trip expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas, *including visitors who said they spent nothing* in these categories. Airline visitors spent significantly more than those who arrived by ground transportation in all three categories. Specifically, airline visitors spent an average of \$168.57 for shopping, \$76.46 on shows, and \$13.59 on sightseeing. Among visitors who arrived by ground transportation, the average totals spent were \$86.74 for shopping, \$32.95 on shows, and \$2.25 on sightseeing.
- *Among visitors who spent money* in these categories, airline visitors spent significantly more than those who arrived by ground transportation on shopping, shows, and sightseeing. Specifically, airline visitors spent an average of \$235.69 for shopping, \$127.31 on shows, and \$176.67 on sightseeing. Visitors who arrived by ground transportation spent an average of \$162.53 for shopping, \$103.66 on shows, and \$70.50 on sightseeing.

## **GAMING BEHAVIOR AND BUDGETS**

- Eighty-five percent (85%) of all Las Vegas visitors gambled while in Las Vegas. Airline visitors (87%) were significantly more likely to have gambled than those who arrived by ground transportation (84%).
- Overall, visitors to Las Vegas averaged 3.3 hours of gambling per day. Those who arrived by ground transportation spent more time gambling on average than airline visitors (3.4 hours per day vs. 3.1).
- All visitors to Las Vegas were asked how many casinos they had visited. Airline visitors visited significantly more casinos on average than those who arrived by ground transportation (7.6 vs. 5.1).
- All visitors to Las Vegas were asked in how many casinos they had gambled. Airline visitors gambled in significantly more casinos on average than those who arrived by ground transportation (3.6 vs. 2.6).

- Visitors who did not gamble were asked why. The largest numbers of these visitors said they were not interested in gambling or found it boring (39%). Another 22% said they didn't like losing, while 13% said they didn't have enough time for gambling, and 7% said they could not afford to gamble. There were no significant differences between airline visitors and those who arrived by ground transportation on this measure.
- Airline visitors had significantly larger gambling budgets than those who arrived by ground transportation. Specifically, airline visitors said they had budgeted an average of \$633.66 for gambling compared to an average of \$453.59 for those who arrived by ground transportation.
- More than six in ten (62%) of all visitors said that having other places to gamble made no difference in their decision to visit Las Vegas. However, visitors who arrived by ground transportation (13%) were significantly more likely than airline visitors (7%) to say they were *much* more likely to visit Las Vegas because there were other places to gamble outside of the area, while airline visitors (66%) were more likely than those who arrived by ground transportation (58%) to say that having more places to gamble outside Las Vegas made no difference in their likelihood of visiting Las Vegas.

## ENTERTAINMENT

- During their stay in Las Vegas, 72% of visitors saw at least one show. Airline visitors (83%) were significantly more likely than those who arrived by ground transportation (65%) to go to a show.
- Among those who attended shows, airline visitors were significantly more likely than those who arrived by ground transportation to attend Las Vegas style production shows (41% vs. 23%), shows featuring big-name entertainers (22% vs. 13%), a comedy revue (18% vs. 11%), impersonator/tribute shows (8% vs. 5%), and magic shows (5% vs. 2%). Those who arrived by ground transportation were more likely than airline visitors to have attended a lounge act (78% vs. 70%).

- We looked at the average number of times visitors attended each type of show *among those who attended shows of that type*. Airline visitors saw significantly more lounge acts (2.0) than did those who arrived by ground transportation (1.6).
- Visitors who did not attend any shows while in Las Vegas were asked why. The majority (60%) said it was because they were too busy to see a show. Those who arrived by ground transportation were more likely than airline visitors to say they came to Las Vegas only to gamble (10% vs. 3%).
- We asked visitors if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay, such as theme parks, water parks, or virtual reality rides. Twenty-one percent (21%) of all visitors said they had, with airline visitors (28%) significantly more likely to have done so than those who arrived by ground transportation (16%).
- We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas. Airline visitors (57%) were significantly more likely than those who arrived by ground transportation (43%) to say they had been to a hotel bar or lounge with no cover charge.
- Beginning in 2008, visitors were asked if they had visited a spa during this trip to Las Vegas. Four percent (4%) said they had. Airline visitors (6%) were more likely than those who arrived by ground transportation (3%) to say they had visited a spa.

## ATTITUDINAL INFORMATION

- Most visitors (93%) said that they were “very satisfied” with their visit to Las Vegas. There were no statistically significant differences between airline visitors and those who arrived by ground transportation in terms of being “very satisfied” with their visit.
- Visitors who were not completely satisfied with their visit were asked to volunteer why. Nearly one in four (23%) had hotel complaints, 14% said Las Vegas is too expensive, 13% said their trip was too short, and 10% complained that it was

hard to get around Las Vegas. Those who arrived by ground transportation were more likely than airline visitors to say their trip was too short for them to be very satisfied (18% vs. 6%).

- Visitors were asked how likely they are to return to Las Vegas the following year, and 69% of all visitors said they “definitely” or “probably” will. Those who arrived by ground transportation (76%) were significantly more likely than airline visitors (59%) to say they “definitely” or “probably” will return.
- Visitors were also asked how likely they are to recommend Las Vegas to others, and most (90%) said they “definitely” or “probably” will recommend Las Vegas. Airline visitors (93%) were more likely than those who arrived by ground transportation (88%) to say they “definitely” or “probably” will recommend Las Vegas.

## VISITOR DEMOGRAPHICS

- Airline visitors were significantly more likely than those who arrived by ground transportation to be employed (69% vs. 63%), college graduates (49% vs. 42%), from 40 to 59 years old (47% vs. 39%), earning \$80,000 or more (47% vs. 36%), white (92% vs. 88%), from U.S. regions other than the West (58% vs. 13%), and foreign visitors (23% vs. 10%).
- Those people who came to Las Vegas by ground transportation were significantly more likely than airline visitors to be retired (30% vs. 26%), either younger (11% were 21 to 29 years old vs. 8% of airline visitors), or older (24% were 65 or older vs. 19% of airline visitors), earning less than \$80,000 (53% vs. 40%), Hispanic/Latino (6% vs. 2%), and from the Western region of the United States (76% vs. 19%), particularly California (45% vs. 6%) and Arizona (14% vs. 2%).

## INTRODUCTION

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

More specifically, the Las Vegas Visitor Profile aims:

- To provide a profile of Las Vegas visitors in terms of socio-demographic and behavioral characteristics.
- To monitor trends in visitor behavior and visitor characteristics.
- To supply detailed information on the vacation and gaming habits of different visitor groups, particularly gaming and non-gaming expenditures.
- To allow the identification of market segments and potential target markets.
- To provide a basis for calculating the economic impact of different visitor groups.
- To determine visitor satisfaction levels.

This report focuses on airline visitors to Las Vegas during calendar year 2008. The tables and charts in this report show data for all visitors and for two visitor subgroups, visitors who arrived by:

- **AIR** — those who arrived in Las Vegas by regularly scheduled, charter, or private airline — 43% of all visitors.
- **GROUND TRANSPORTATION** — those who arrived in Las Vegas by automobile, RV, truck, motorcycle, or bus — 57% of all visitors.

## 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,

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. Statistically significant differences in the behavior, attitudes, and opinions of visitors who arrived in Las Vegas by air and those who arrived by ground transportation are pointed out in the text of the report.

In order to maintain a questionnaire of reasonable length, some questions in the Las Vegas Visitor Profile Study were not asked in Calendar Year 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 visitors were first-time visitors to Las Vegas, and eighty-four percent (84%) were repeat visitors. Airline visitors were significantly more likely to be making their first trip to Las Vegas (23%) than those who arrived by ground transportation (10%) (Figure 1).

FIGURE 1  
First Visit Vs. Repeat Visit

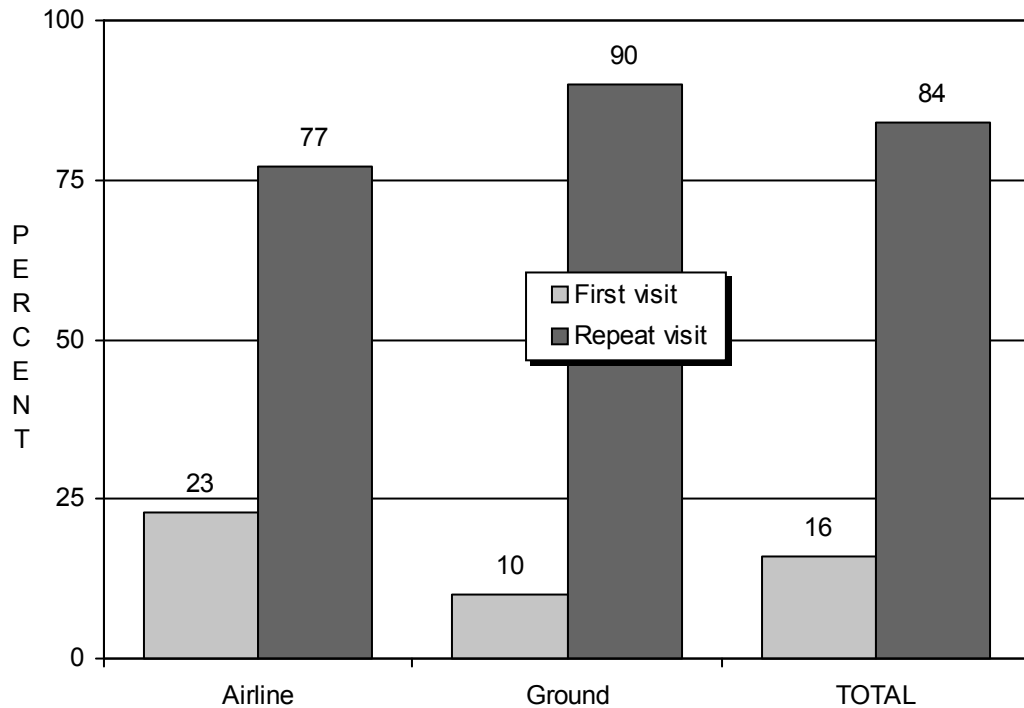
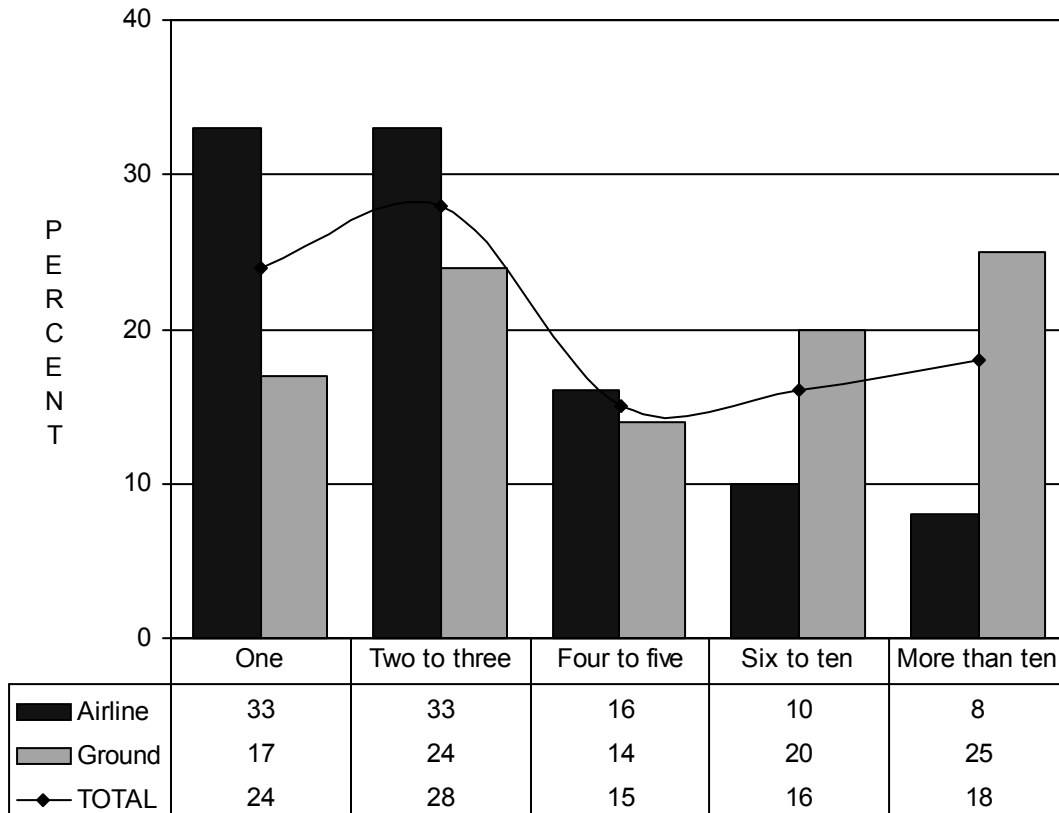


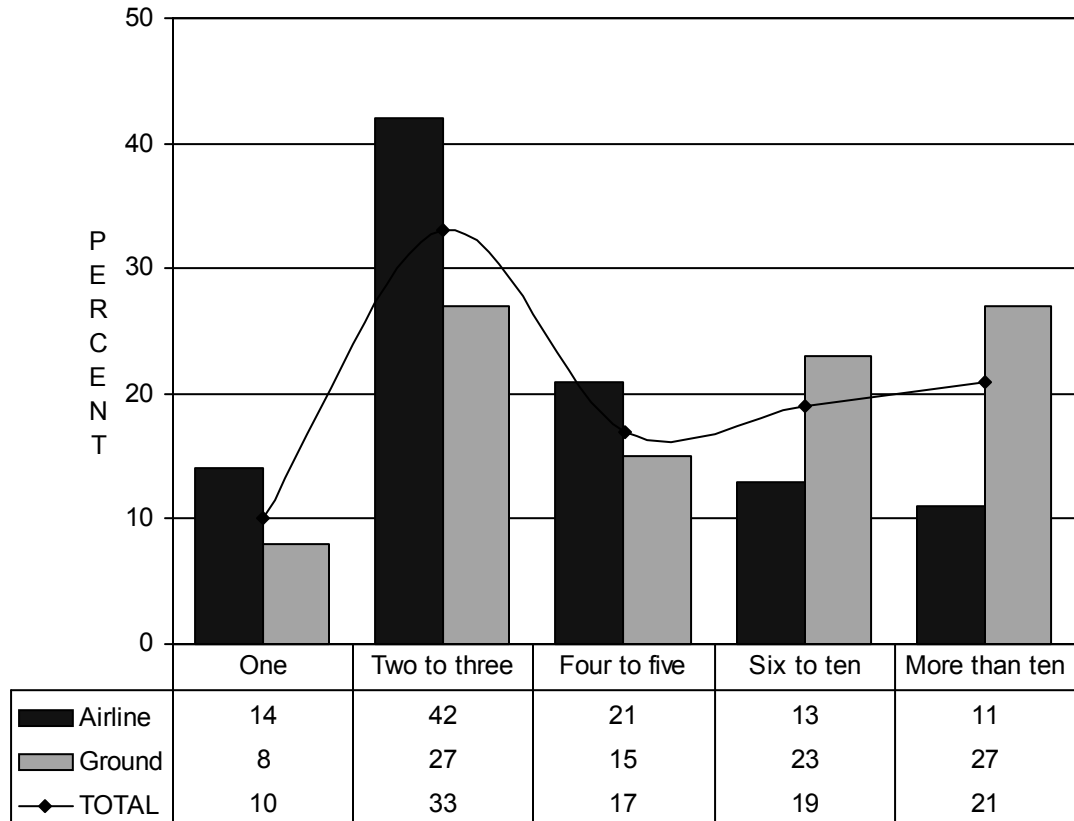
FIGURE 2  
Frequency Of Visits In Past Five Years  
(Among All Visitors)



(Means: Airline=4.5, Ground=8.5, TOTAL=6.8)

The mean (average) number of visits to Las Vegas during the past five years was significantly higher for those who arrived by ground transportation (mean of 8.5) than for airline visitors (mean of 4.5) (Figure 2).

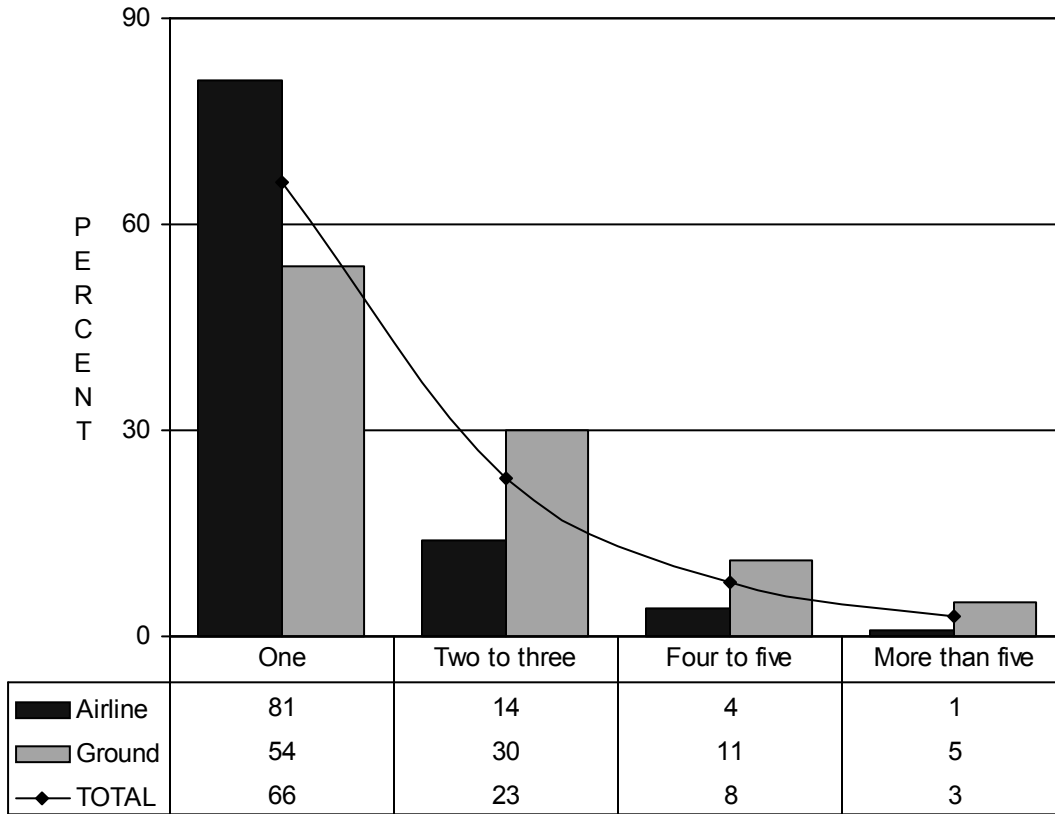
**FIGURE 3**  
Frequency Of Visits In Past Five Years  
(Among Repeat Visitors)



(Base Sizes: Airline=1192, Ground =1851, TOTAL=3043)  
(Means: Airline=5.5, Ground =9.4, TOTAL=7.9)

Looking at repeat visitors, the mean (average) number of visits to Las Vegas during the past five years was significantly higher for those who arrived by ground transportation (mean of 9.4) than for airline visitors (mean of 5.5) (Figure 3).

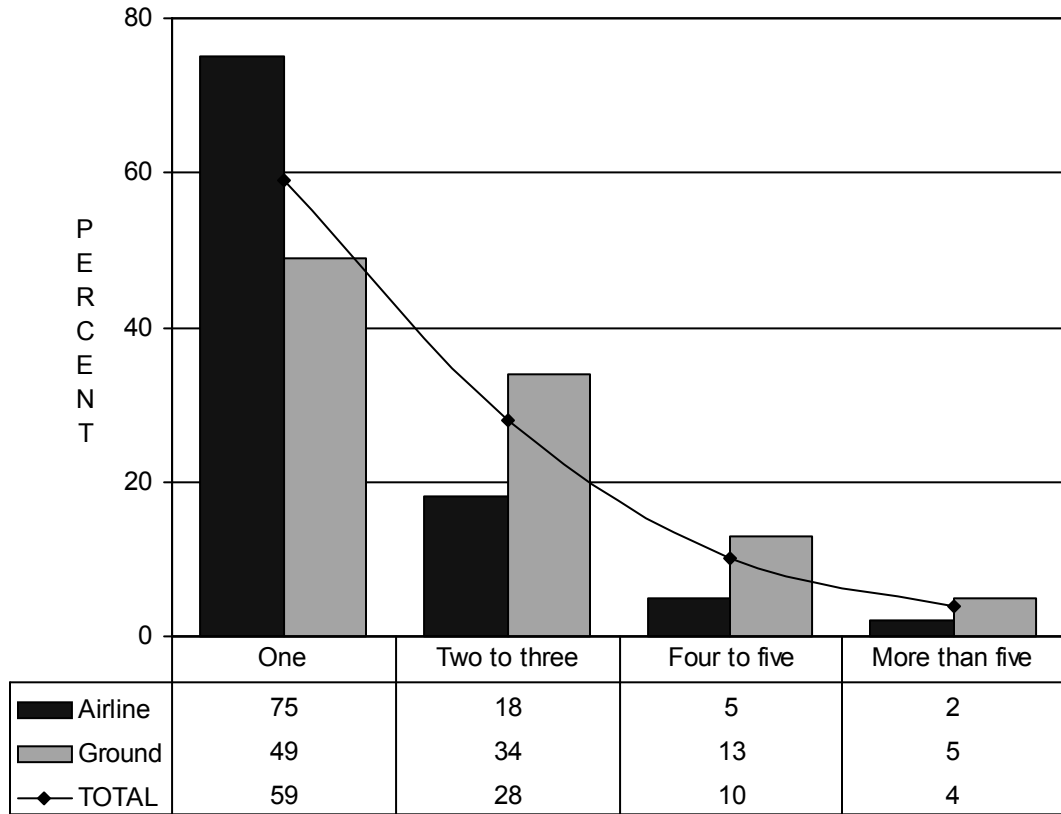
FIGURE 4  
Frequency Of Visits In Past Year  
(Among All Visitors)



(Means: Airline=1.4, Ground =2.1, TOTAL=1.8)

As Figure 4 shows, airline visitors (81%) were significantly more likely than those who traveled to Las Vegas by ground transportation (54%) to have visited only once in the past year. The mean (average) number of visits over the past year was significantly higher for those who arrived by ground transportation (2.1) than it was for airline visitors (1.4).

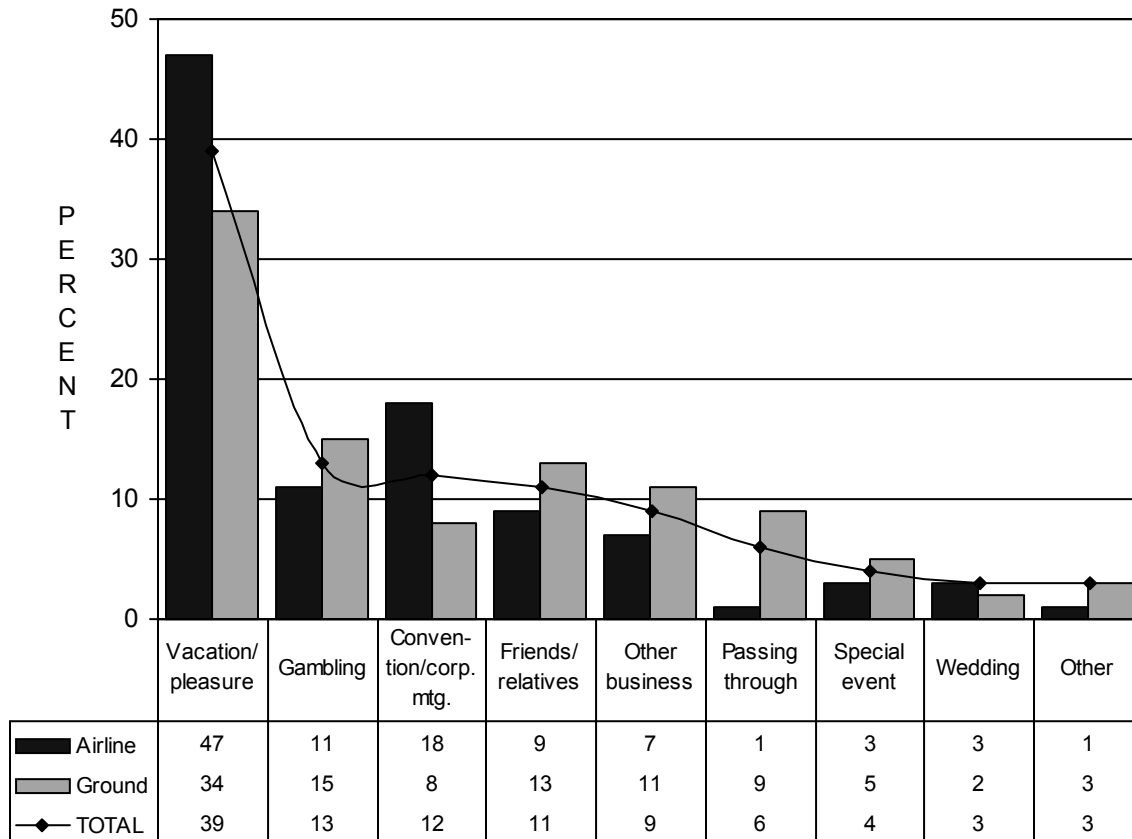
FIGURE 5  
 Frequency Of Visits In Past Year  
 (Among Repeat Visitors)



(Base Sizes: Airline=1192, Ground =1851, TOTAL=3043)  
 (Means: Airline=1.5, Ground=2.2, TOTAL=1.9)

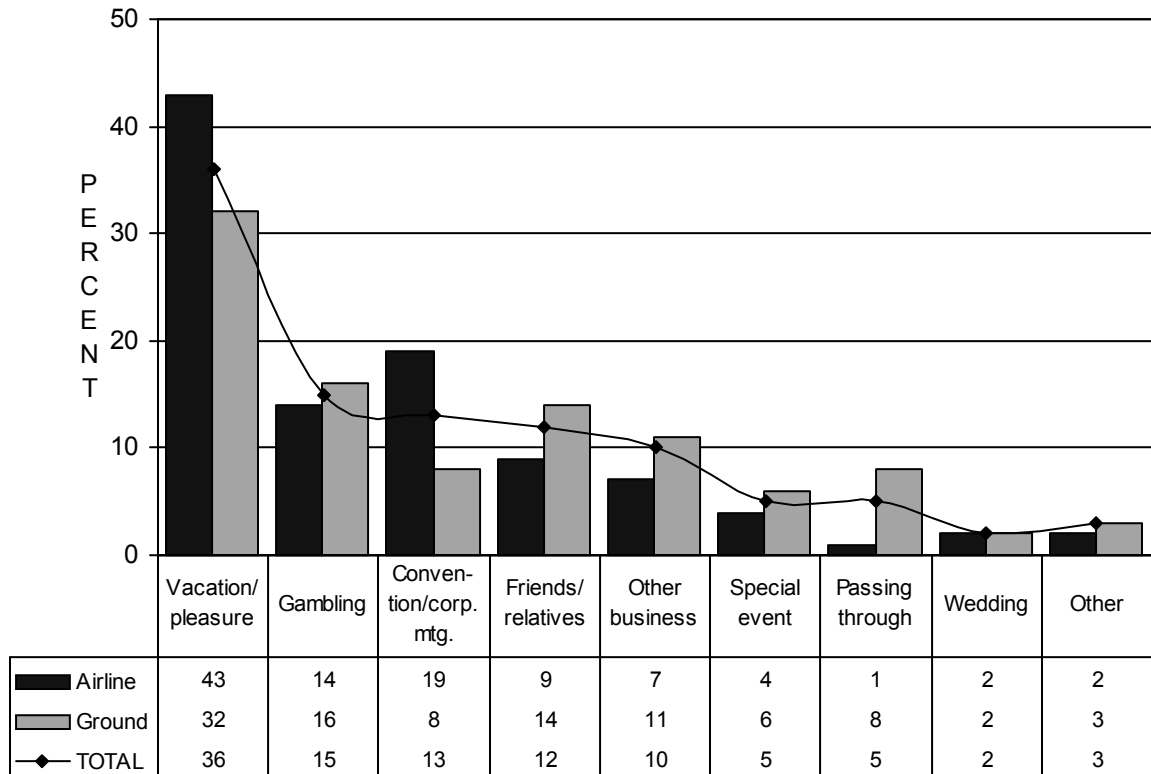
Among respondents who had visited Las Vegas before, airline visitors (75%) were significantly more likely than those who traveled to Las Vegas by ground transportation (49%) to have visited only once in the past year (Figure 5). The mean (average) number of visits was significantly higher for those who arrived by ground transportation (2.2) than it was for airline visitors (1.5).

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



Looking at the primary purpose of the *current visit* among all visitors, airline visitors (47%) were significantly more likely than those who arrived by ground transportation (34%) to say the primary purpose of their current trip was for vacation or pleasure (Figure 6). Airline visitors were also significantly more likely than those who arrived by other means to say that the primary purpose of their current trip was to attend a convention or corporate meeting (18% vs. 8%). Visitors who arrived by ground transportation were significantly more likely than airline visitors to say they visited Las Vegas primarily to gamble (15% vs. 11%), to visit friends or relatives (13% vs. 9%), for business purposes other than a convention or corporate meeting (11% vs. 7%), were in Las Vegas for a special event (5% vs. 3%), or were just passing through (9% vs. 1%).

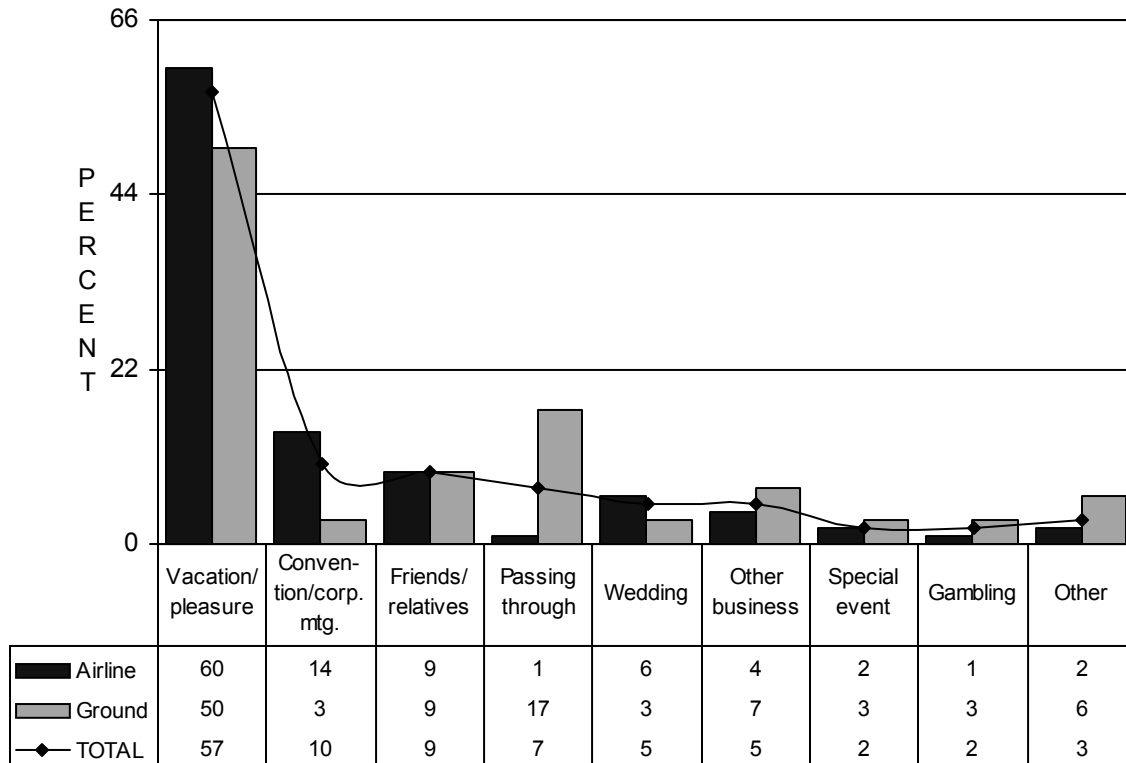
FIGURE 7  
Primary Purpose Of Current Visit  
(Among Repeat Visitors)



(Base Sizes: Airline=1192, Ground =1851, TOTAL=3043)

Looking only at those who had been to Las Vegas before (Figure 7), airline visitors (43%) were significantly more likely than those who arrived by other means (32%) to say they were visiting for vacation or pleasure. Airline visitors (19%) were also significantly more likely than those who arrived by other means (8%) to say their current visit had been primarily to attend a convention or corporate meeting. Visitors who arrived by ground transportation were significantly more likely than airline visitors to say their current visit had been to visit friends or relatives (14% vs. 9%), for business purposes other than a convention or corporate meeting (11% vs. 7%), for a special event (6% vs. 4%), or to say that they were just passing through Las Vegas (8% vs. 1%).

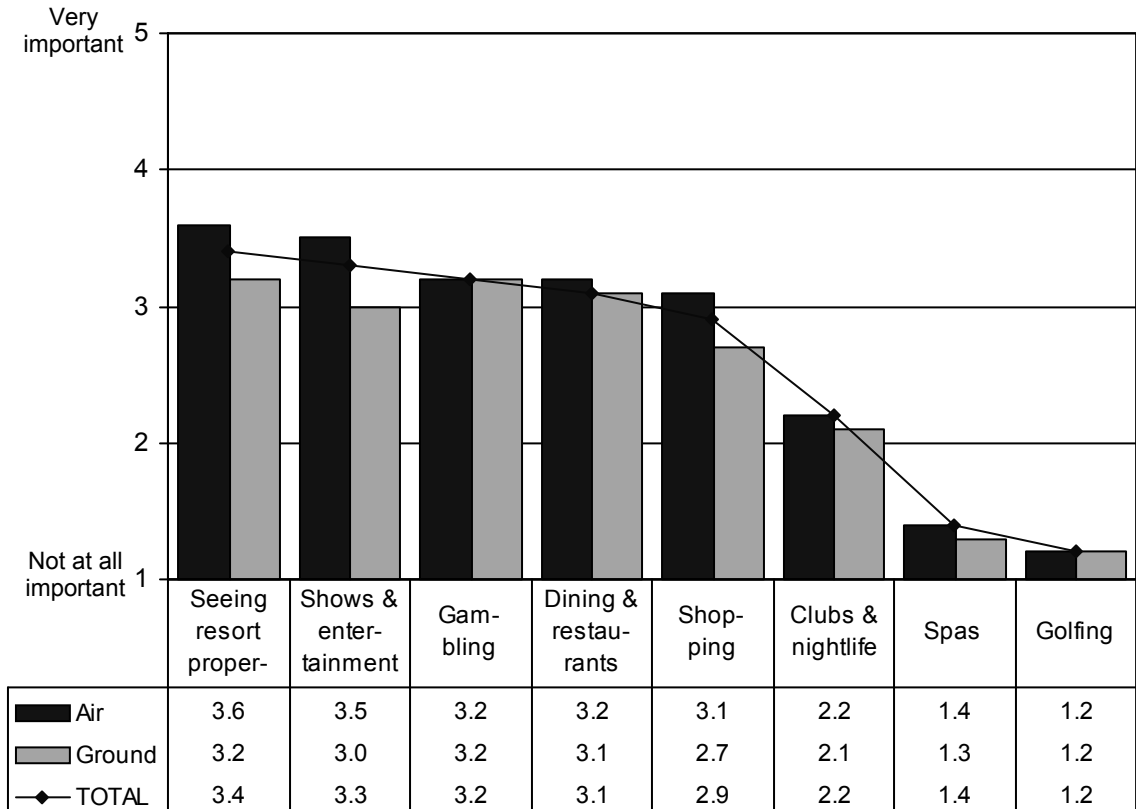
FIGURE 8  
Primary Purpose Of Current Visit  
(Among First-Time Visitors)



(Base Sizes: Airline=355, Ground=203, TOTAL=558)

We also looked at the purpose of the current visit among those who were making their first trip to Las Vegas (Figure 8). Airline visitors were significantly more likely than those who arrived by ground transportation to say their current visit was for a convention or corporate meeting (14% vs. 3%). Visitors who arrived by ground transportation (17%) were more likely than airline visitors (1%) to say they were just passing through.

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

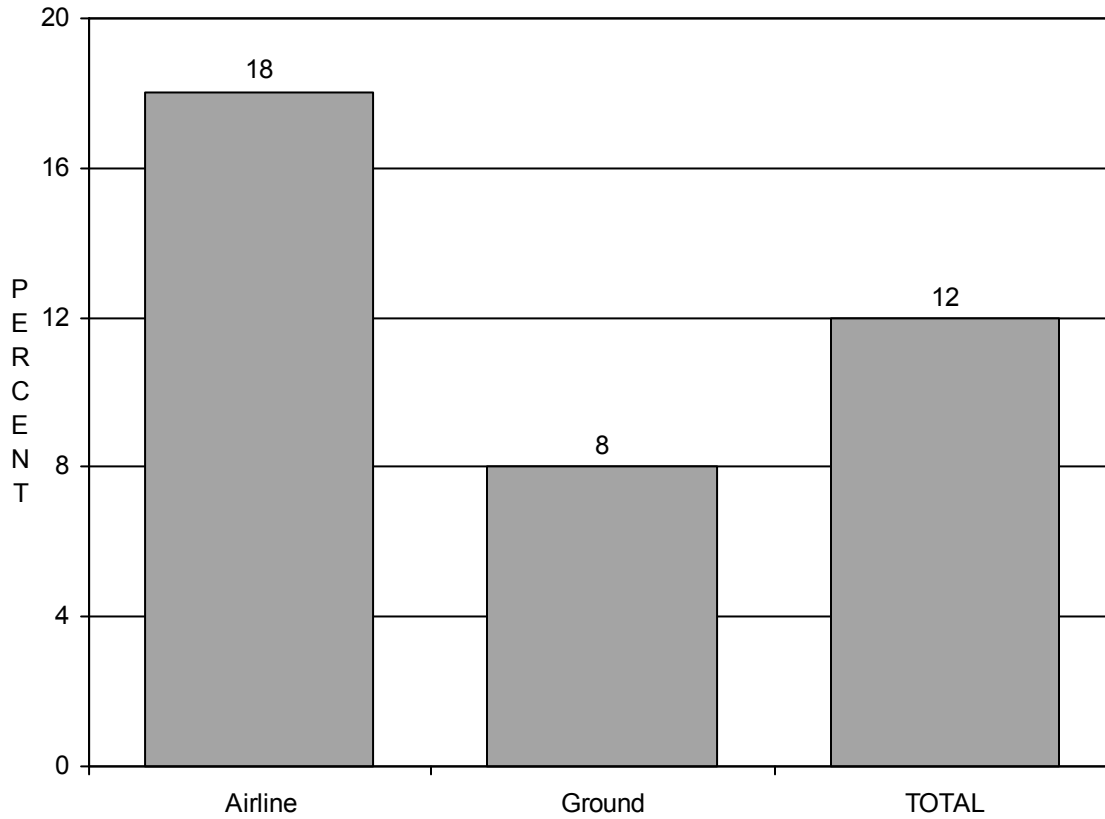


(Base Sizes: Air=720, Ground=689, TOTAL=1410)

Vacation and 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.”

Visitors who arrived by air place greater importance than visitors who arrived by ground transportation on shows and entertainment (mean score of 3.5 vs. 3.0), seeing the resort properties (3.6 vs. 3.2), and shopping (3.1 vs. 2.7).

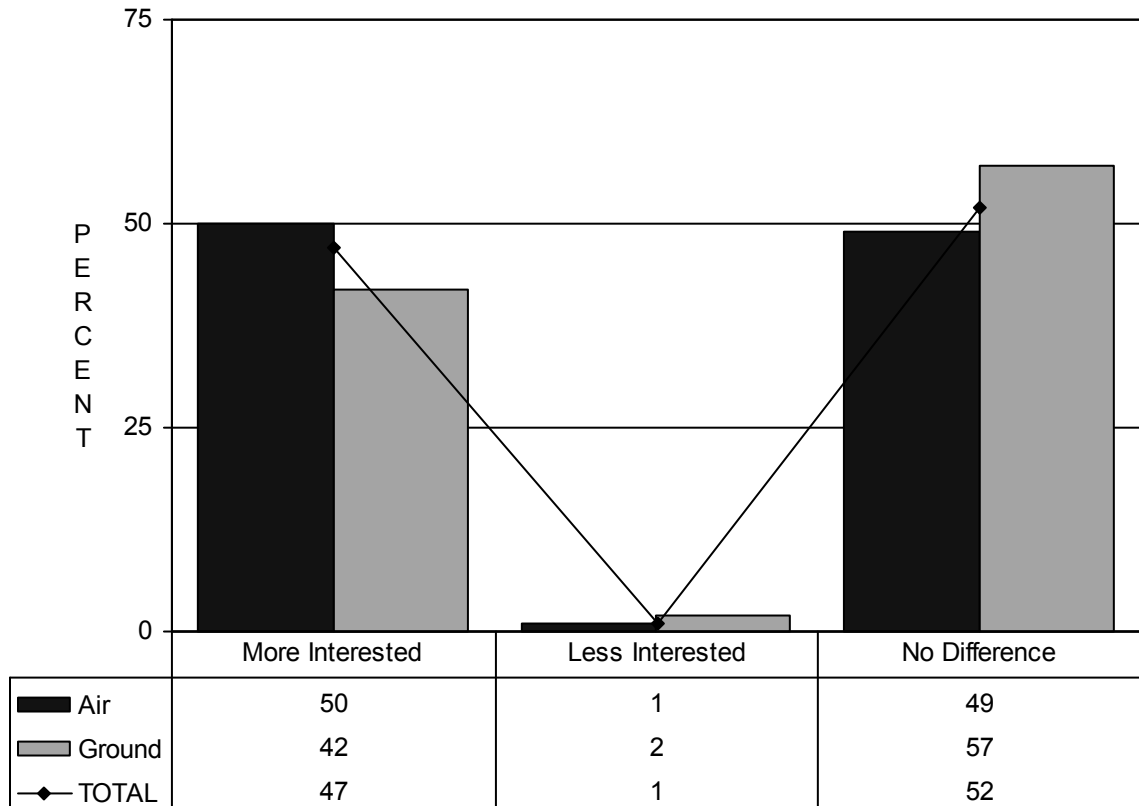
FIGURE 10  
Conventions/Trade Shows/Corporate Meetings



Only "yes" responses are reported in this figure.

Respondents were asked if they had attended a convention, trade show, or corporate meeting while they were in Las Vegas (Figure 10). Airline visitors (18%) were significantly more likely than those who arrived by ground transportation (8%) to say they had.

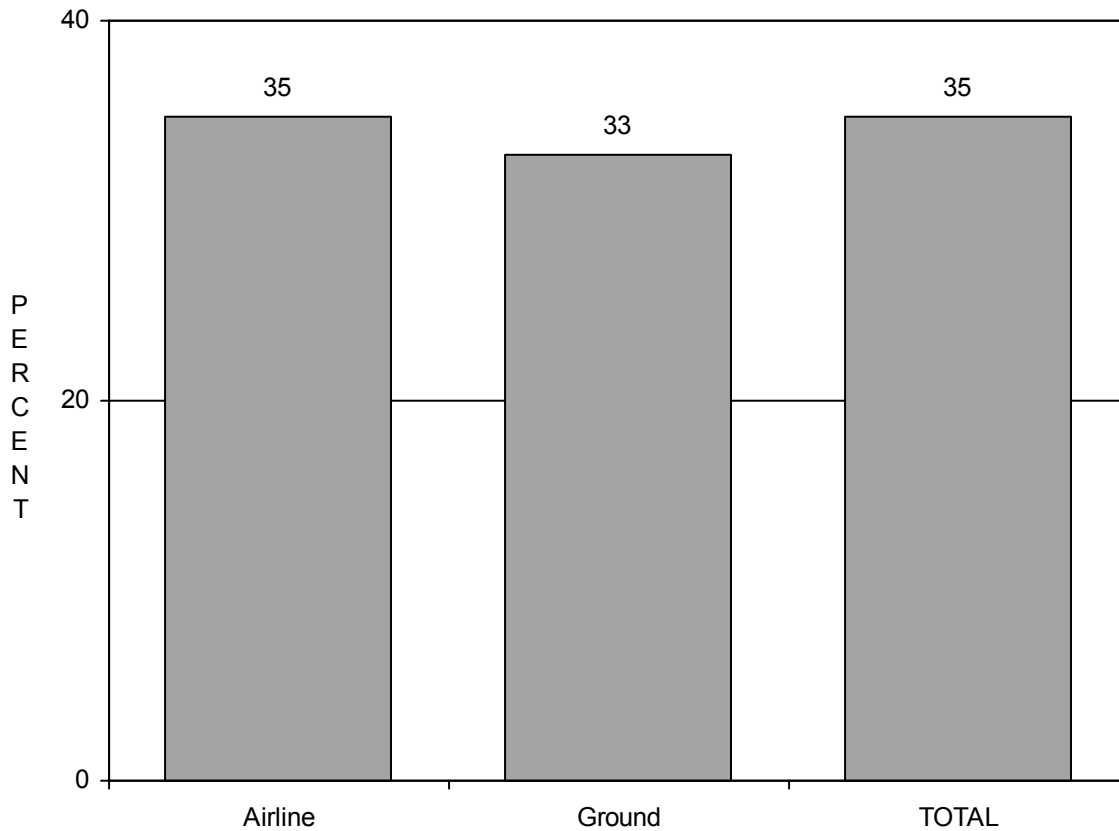
**FIGURE 11**  
 Interest In Attending Conventions, Trade Shows, Or  
 Corporate Meetings In Las Vegas  
 (Among Visitors Who Attended A Convention,  
 Trade Show, Or Corporate Meeting)



(Base Sizes: Air=285, Ground=157, TOTAL=443)

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). Forty-seven percent (47%) said having the convention in Las Vegas made them more interested in attending, while 52% said it made no difference. There were no significant differences between the subgroups on this measure.

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)\*



(Base Sizes: Air=285, Ground=157, TOTAL=443)

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

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). There were no statistically significant differences between the subgroups on this question.

## TRAVEL PLANNING

Airline visitors tended to plan their trip farther in advance than did visitors who arrived in Las Vegas by ground transportation (Figure 13). For example, 76% of airline visitors planned their trip more than one month in advance, compared to 54% of those who arrived by ground transportation.

FIGURE 13  
Advance Travel Planning

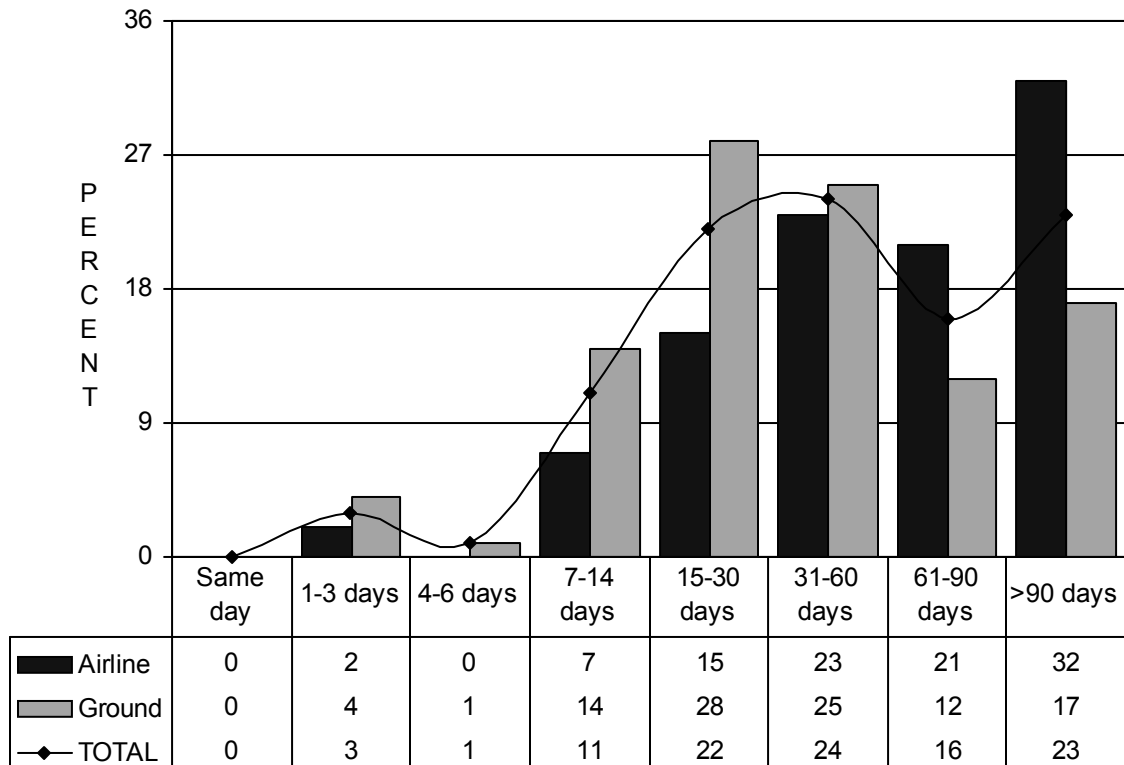
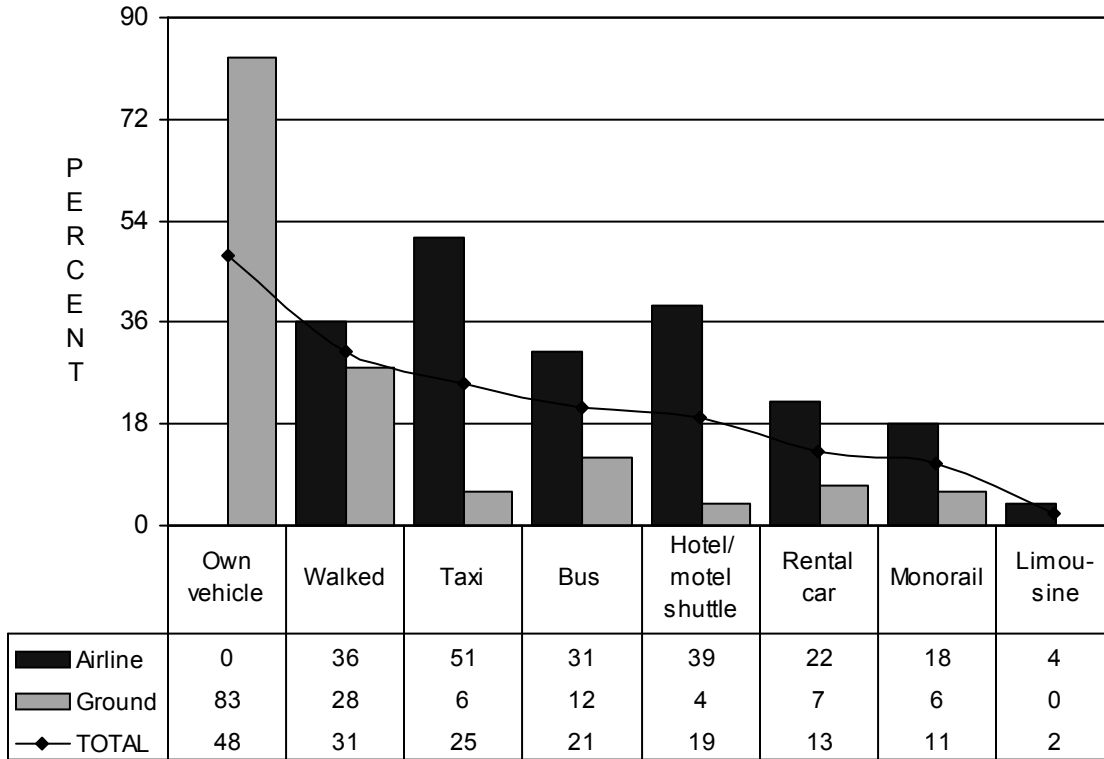


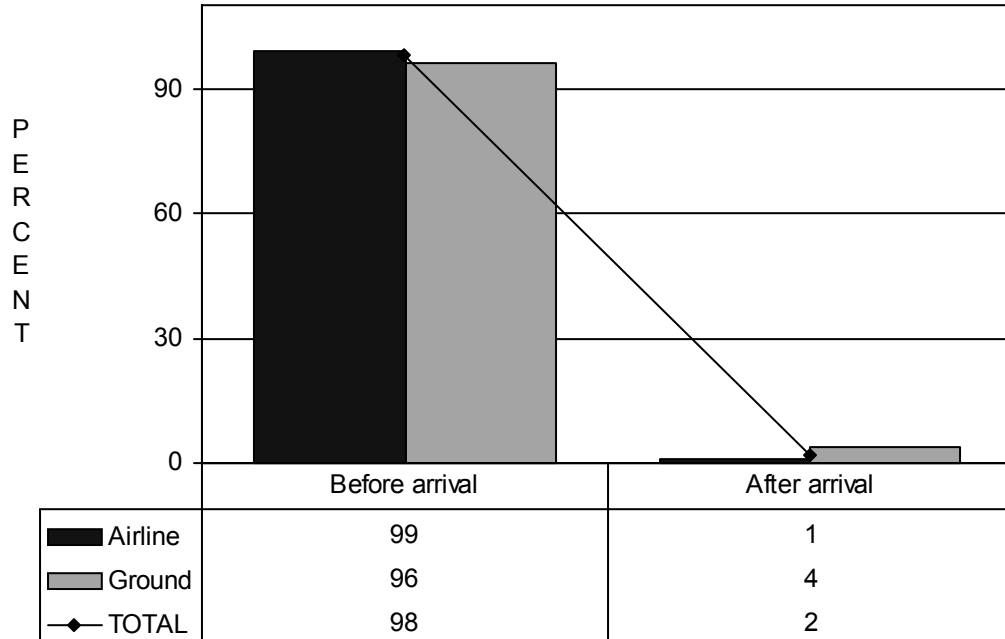
FIGURE 14  
Local Transportation\*



\*Multiple responses permitted

As might be expected, airline visitors were much more likely than those who arrived in Las Vegas by ground transportation to use a variety of local transportation options to get around Las Vegas during their visit (Figure 14), including taxis (51% vs. 6%), hotel and motel shuttles (39% vs. 4%), rental cars (22% vs. 7%), the Monorail (18% vs. 6%), buses (31% vs. 12%), and limousines (4% vs. less than 1%). Airline visitors were also more likely than those who arrived by ground transportation to say they had walked around Las Vegas (36% vs. 28%).

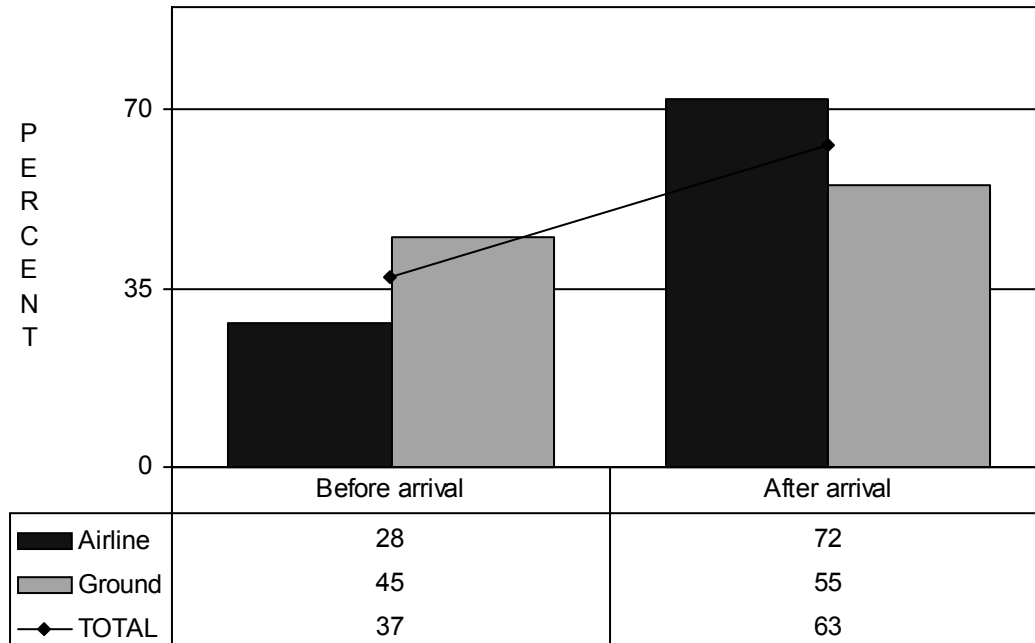
FIGURE 15  
When Decided Where To Stay  
(Among Those Who Stayed Overnight)



(Base Sizes: Air=1547, Ground=2039, TOTAL=3587)

Most visitors (98%) decided where to stay before arriving in Las Vegas (Figure 15). Visitors who arrived by ground transportation (4%) were significantly more likely than airline visitors (1%) to say they decided where to stay after arrival.

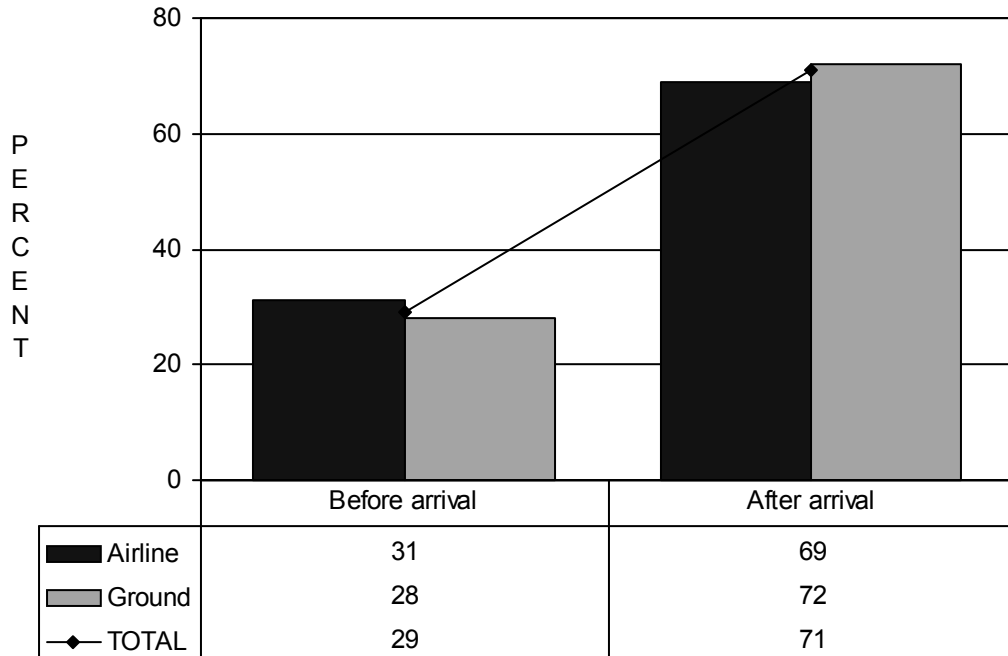
FIGURE 16  
When Decided Where To Gamble  
(Among Those Who Gambled)



(Base Sizes: Air=1343, Ground=1717, TOTAL=3060)

Most visitors (63%) decided where to gamble after arriving in Las Vegas (Figure 16). Airline visitors (72%) were significantly more likely than those who arrived by ground transportation (55%) to say they decided where to gamble after arrival.

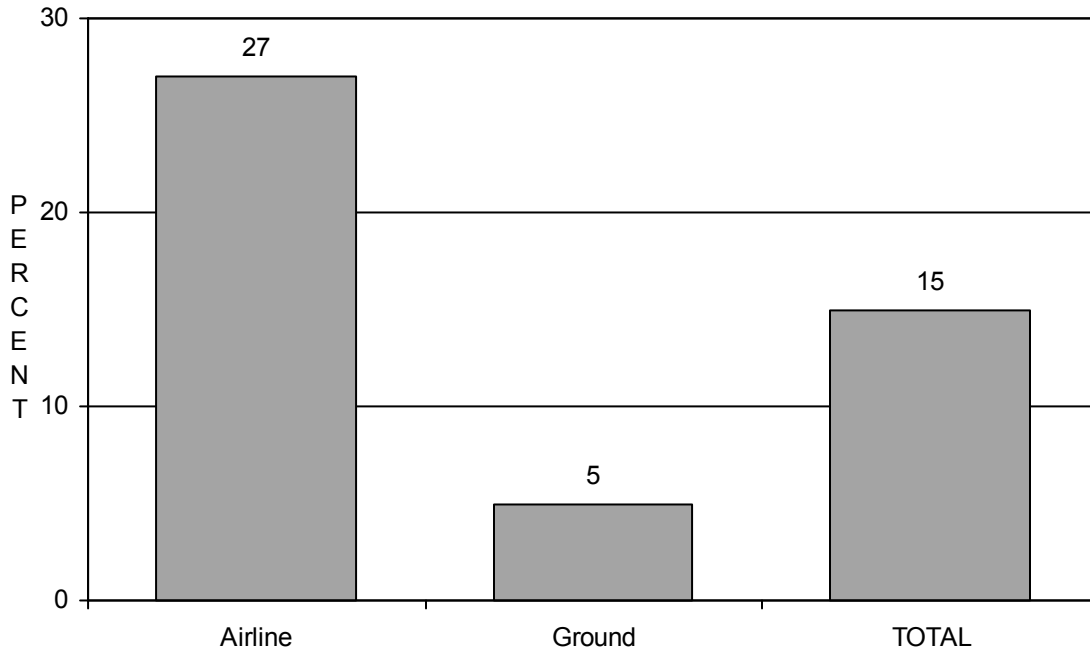
FIGURE 17  
 When Decided Which Shows To See  
 (Among Those Who Saw Shows)



(Base Sizes: Air=1278, Ground=1331, TOTAL=2609)

While most visitors (71%) decided which shows to see after arrival, three in ten (29%) decided before leaving home (Figure 17). There were no significant differences between airline visitors and those who arrived by ground transportation on this measure.

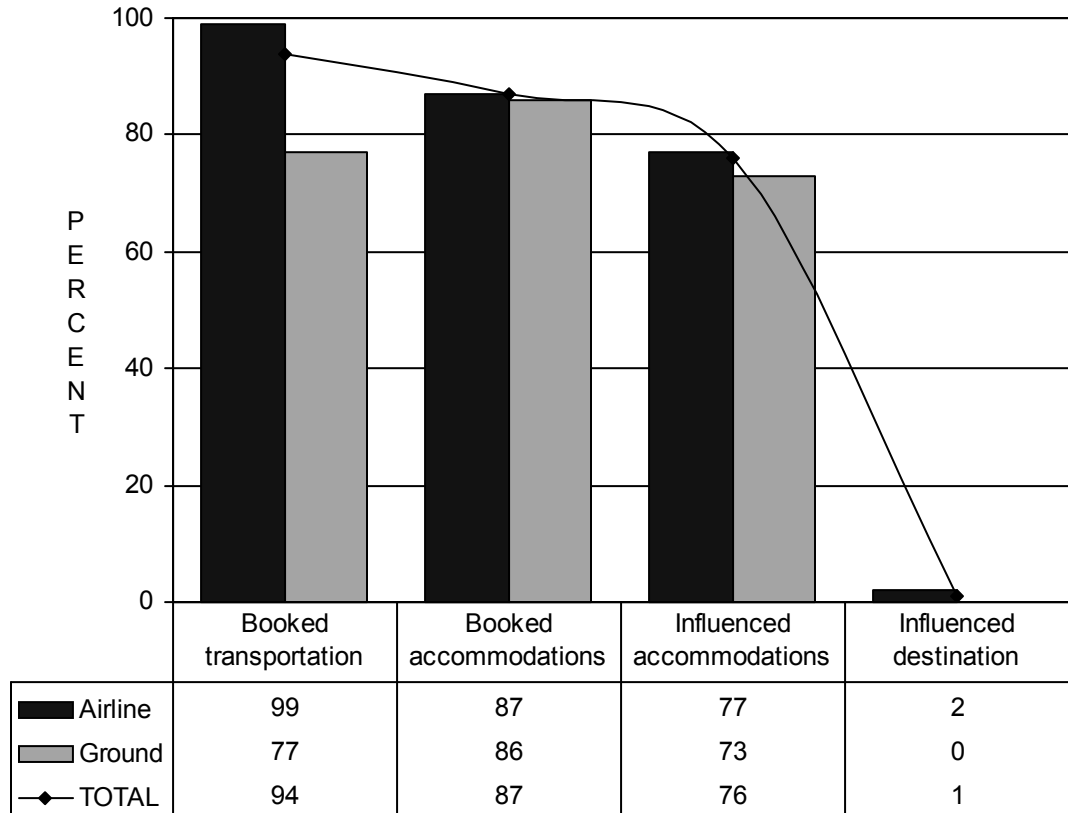
FIGURE 18  
Travel Agent Assistance\*



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

Fifteen percent (15%) of visitors to Las Vegas said they used a travel agent to help plan their trip. A significantly higher proportion of airline visitors (27%) used the assistance of a travel agent to plan their trip to Las Vegas compared to those who traveled by ground transportation (5%) (Figure 18).

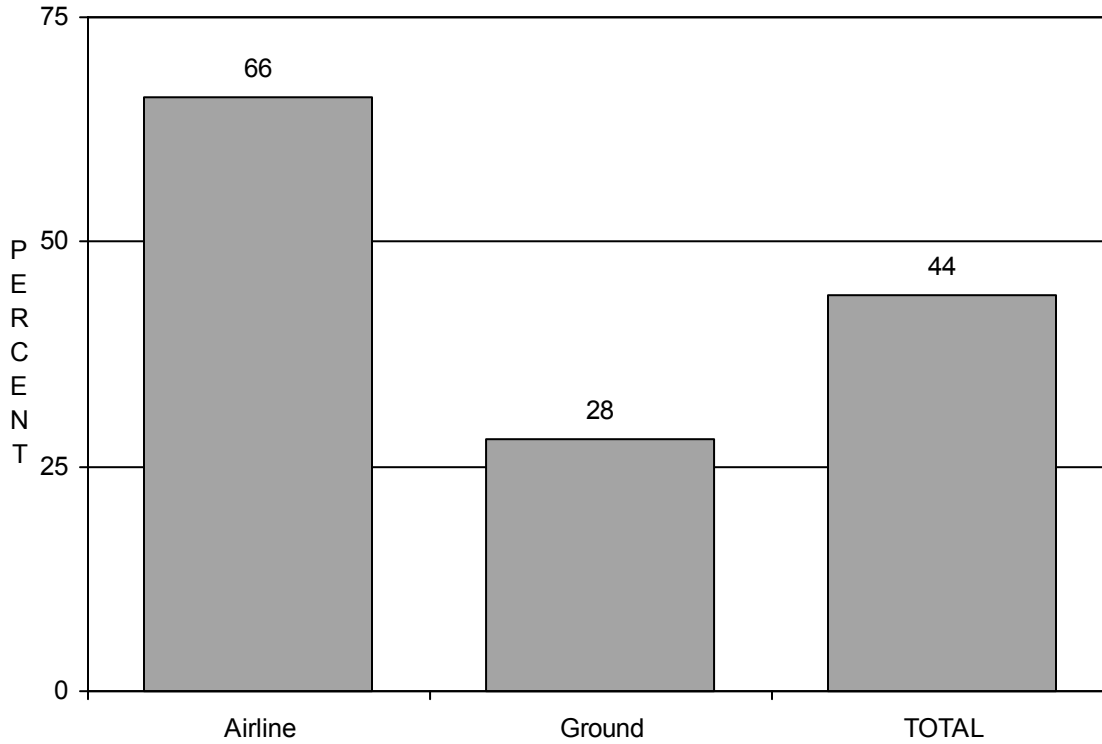
FIGURE 19  
Travel Agent Influence And Use\*  
(Among Those Who Used A Travel Agent)



\*Multiple responses permitted  
(Base Sizes: Airline=423, Ground=102, TOTAL=526)

Among visitors who used a travel agent, nearly all (99%) airline visitors said the agent booked their transportation to Las Vegas, compared to a significantly smaller 77% of those who arrived by ground transportation (Figure 19). Overall 87% of visitors who used a travel agent said the travel agent booked their accommodations, 76% said the travel agent influenced their choice of accommodations, and 1% said the travel agent influenced their decision to visit Las Vegas.

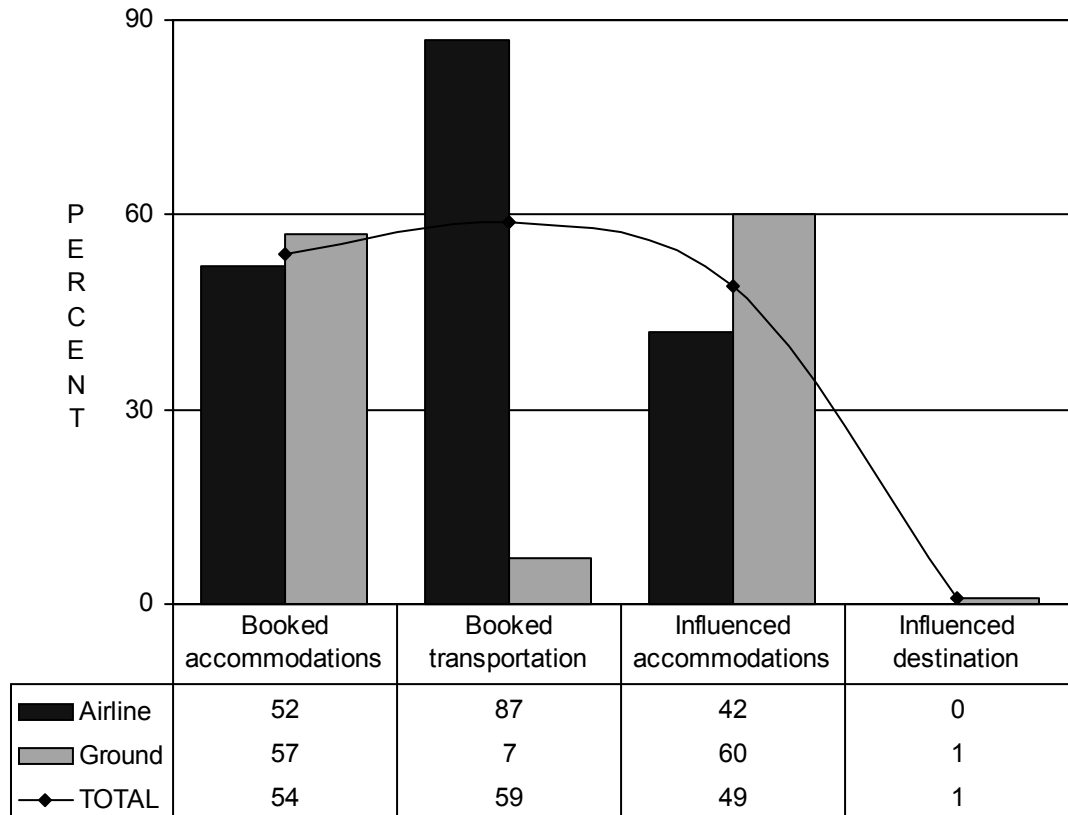
FIGURE 20  
Whether Used The Internet To Plan Trip\*



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

Visitors were asked if they used the Internet to plan their trip, and 44% said they had done so (Figure 20). Airline visitors (66%) were significantly more likely to use the Internet to plan their trip than visitors who arrived by ground transportation (28%).

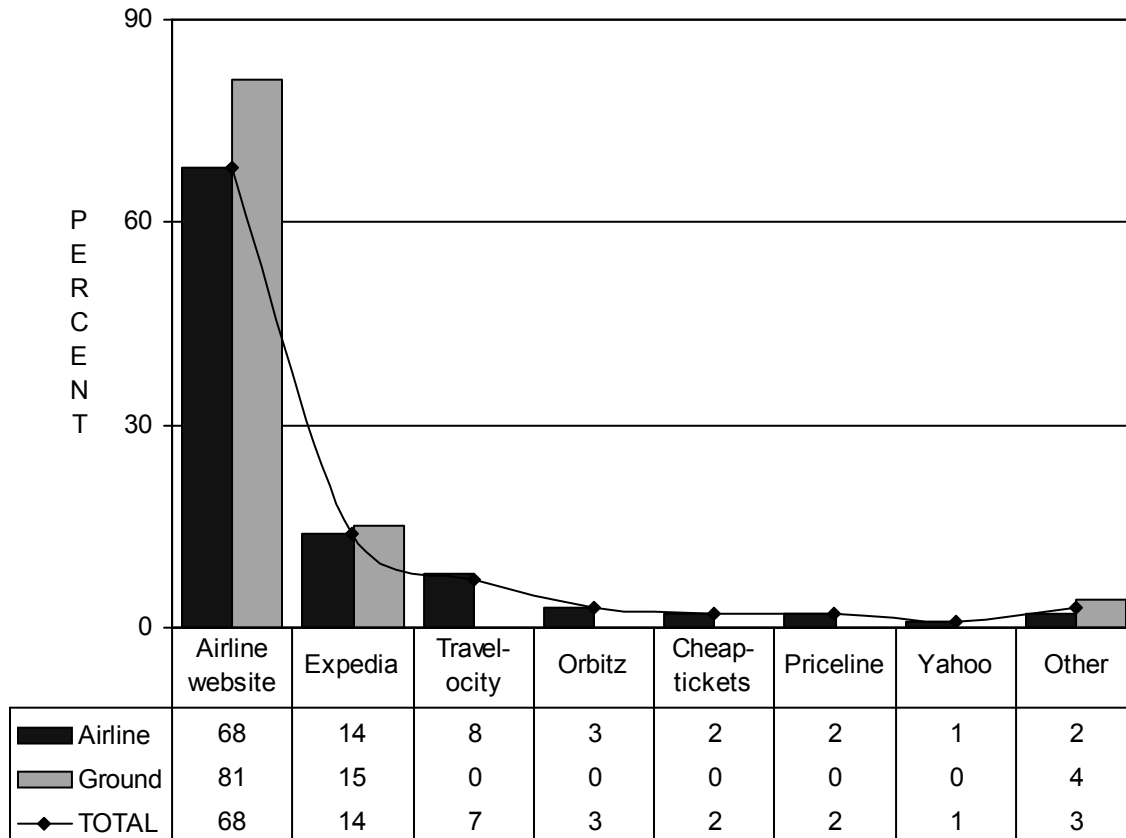
**FIGURE 21**  
**Internet Influence And Use\***  
(Among Those Who Used The Internet To Plan Trip)



\*Only "yes" responses are reported in this figure.  
(Base Sizes: Airline=1026, Ground=570, TOTAL=1596)

Among those who said they used the Internet to plan their trip, airline visitors (87%) were far more likely than those who arrived by ground transportation (7%) to say they used the Internet to book their transportation to Las Vegas (Figure 21). Visitors who arrived by ground transportation, however, were significantly more likely than airline visitors to say they found information on the Internet that influenced their choice of accommodations (60% vs. 42%).

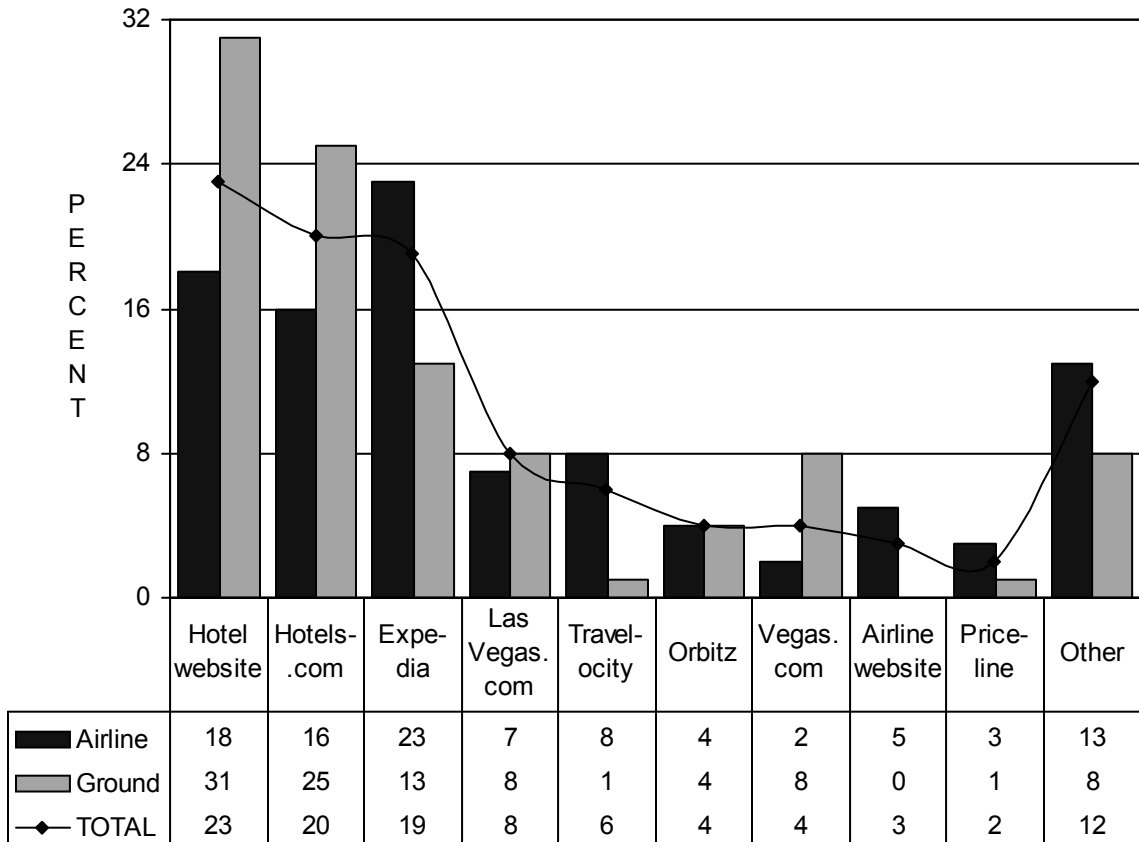
FIGURE 22  
Website Used To Book Transportation  
(Among Those Who Booked Their  
Transportation To Las Vegas Online)



(Base Sizes: Airline=897, Ground=40, TOTAL=936)

Airline visitors who booked their transportation online were most likely to say they had used an airline website (68%), followed at a distance by Expedia (14%), Travelocity (8%), and Orbitz (3%) (Figure 22). A smaller number of airline visitors used other websites. Visitors who arrived by ground transportation but booked transportation online were most likely to say they used an airline website (81%) followed by Expedia (15%).

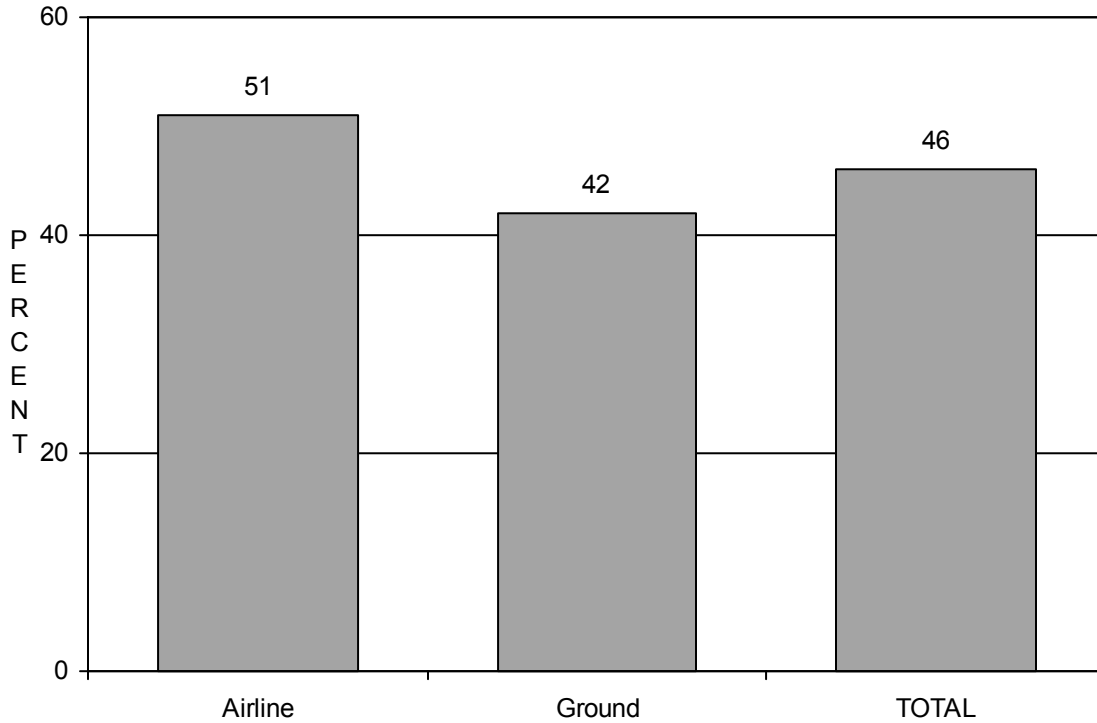
**FIGURE 23**  
**Website Used To Book Accommodations**  
(Among Those Who Booked Their  
Accommodations In Las Vegas Online)



(Base Sizes: Airline=537, Ground=325, TOTAL=861)

Visitors who booked their accommodations online and arrived by ground transportation were significantly more likely than airline visitors to say they used a hotel website (31% vs. 18%) or Hotels.com (25% vs. 16%) to book their accommodations (Figure 23). Airline visitors were significantly more likely than those who arrived by ground transportation to say they used Expedia (23% vs. 13%), or Travelocity (8% vs. 1%).

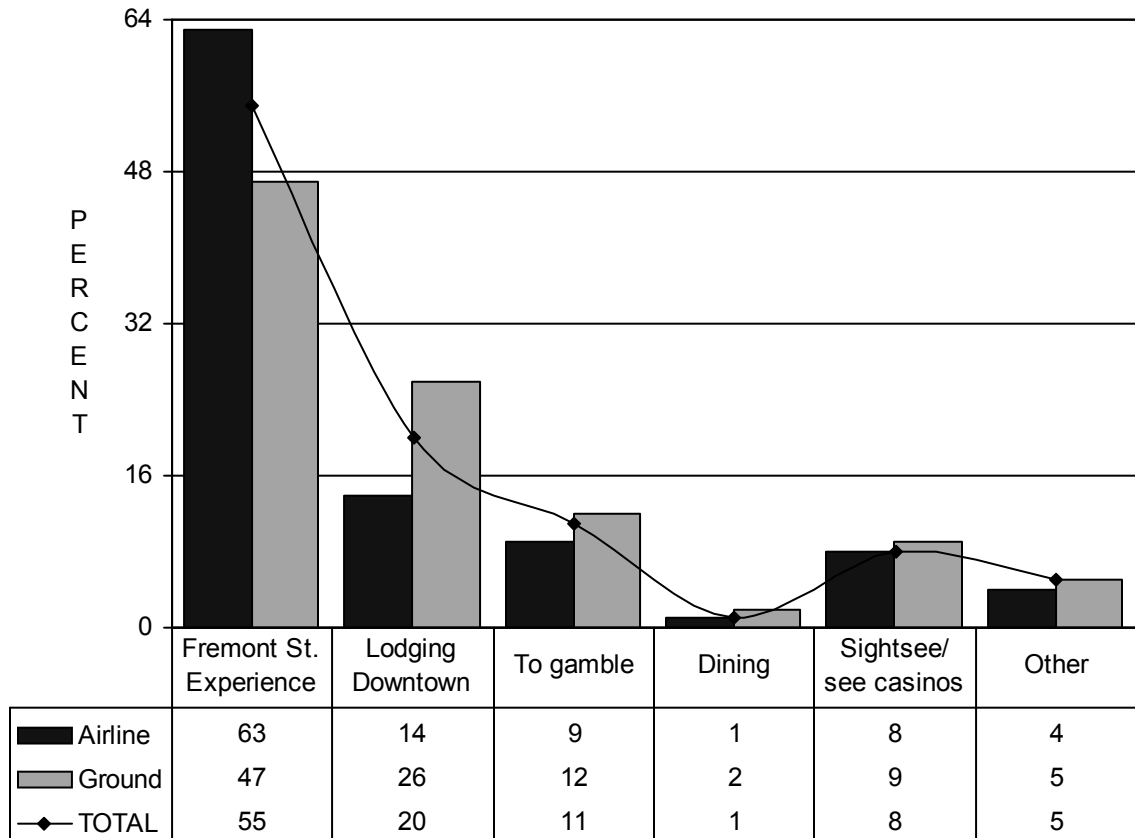
FIGURE 24  
Whether Visited Downtown Las Vegas\*



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

Airline visitors (51%) were significantly more likely than those who arrived by ground transportation (42%) to say they visited Downtown Las Vegas (Figure 24).

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

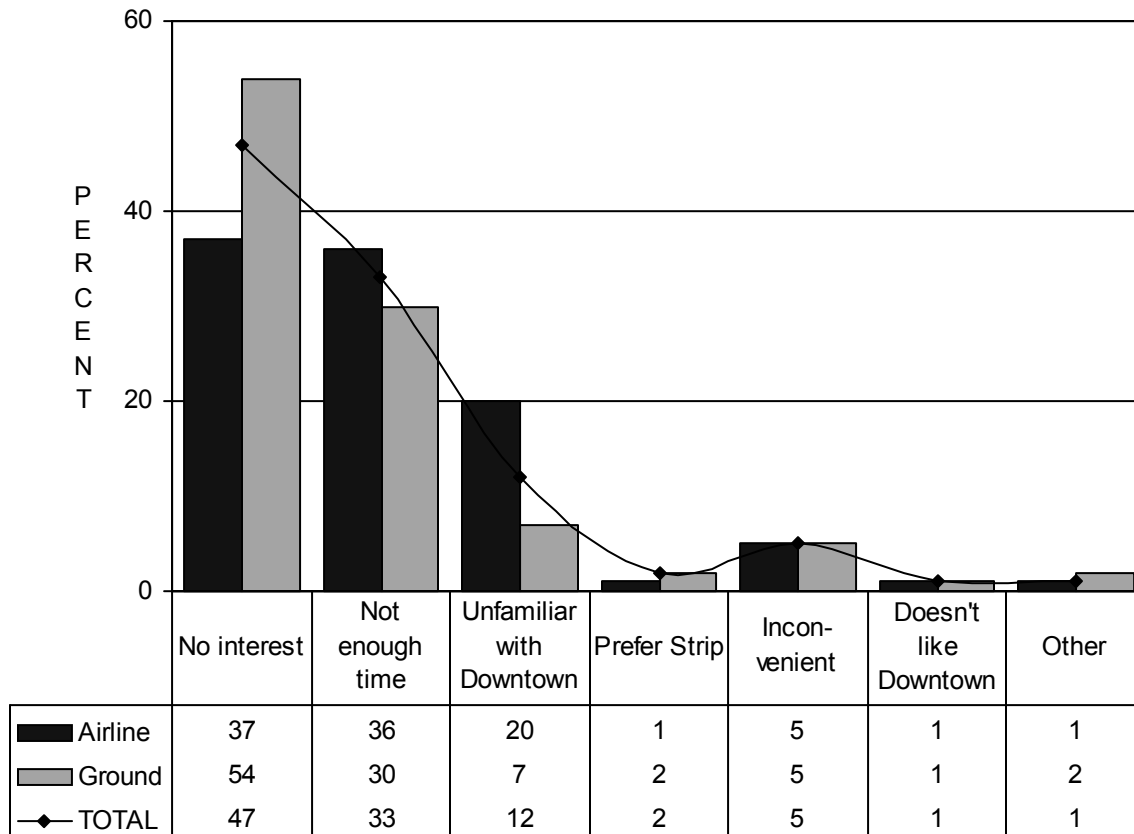


(Base Sizes: Airline=695, Ground=736, TOTAL=1431)

Respondents who had visited Downtown Las Vegas were asked the primary reason why they had done so (Figure 25). Visitors who arrived by air (63%) were significantly more likely than those who arrived by ground transportation (47%) to say the Fremont Street Experience was their main reason for visiting Downtown. Visitors who arrived by ground transportation were more likely than air visitors to have been visiting Downtown because they were lodging there (26% vs. 14%).

\* These results are from 2007. This question is asked every other year and was not asked in 2008.

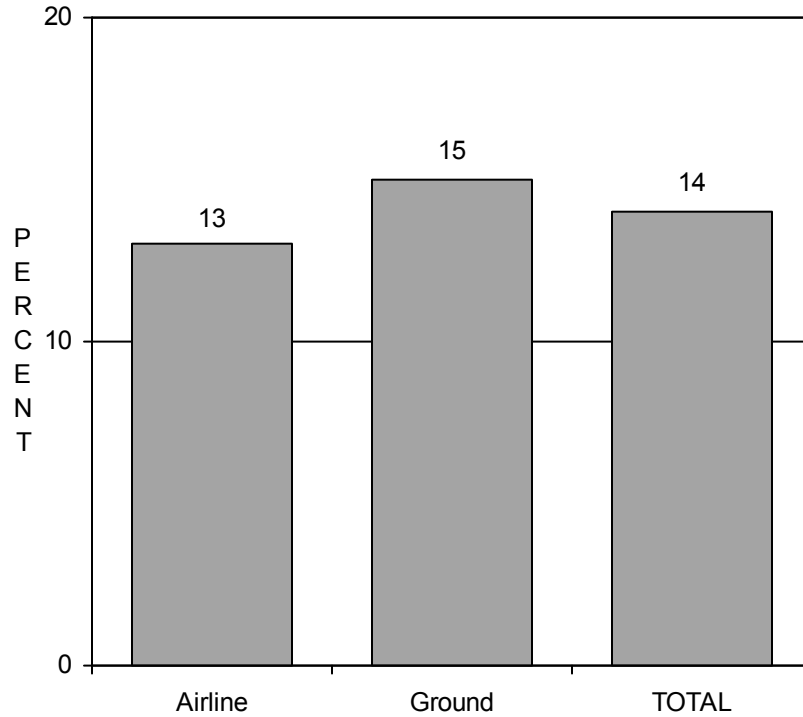
FIGURE 26  
Main Reason For Not Visiting Downtown Las Vegas  
(Among Those Who Did Not Visit Downtown)



(Base Sizes: Air=754, Non-Internet=1190, TOTAL=1944)

Visitors who did not visit Downtown were asked to volunteer why (Figure 26). Those who arrived by ground transportation (54%) were more likely than airline visitors (37%) to say they were not interested in Downtown. Airline visitors were significantly more likely than those who arrived by ground transportation to say they did not have time (36% vs. 30%) or that they were unfamiliar with Downtown (20% vs. 7%).

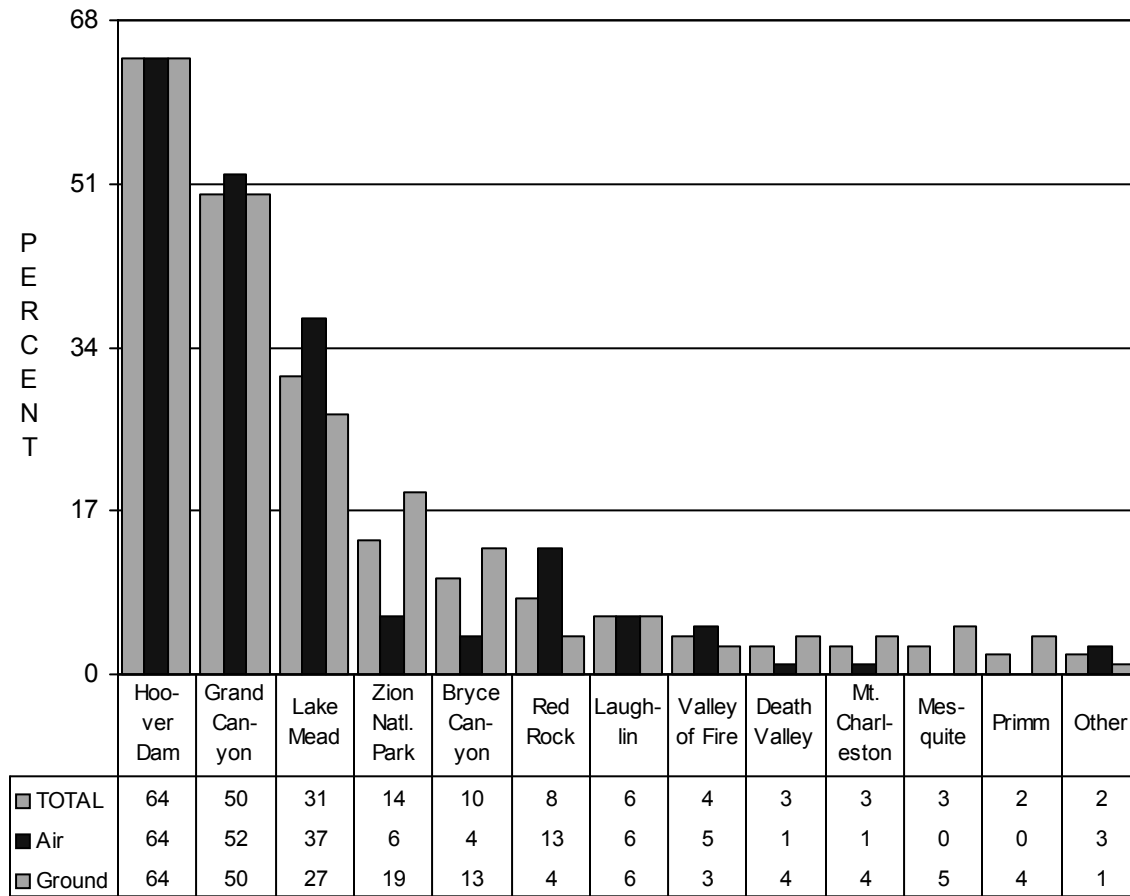
FIGURE 27  
Visits To Nearby Places\*



Visitors were asked if they visited any nearby places before or after their trip to Las Vegas (Figure 27). Overall 14% said they had visited nearby places, with no significant difference between airline visitors and those who arrived by ground transportation.

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

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



(Base Sizes: Air=204, Ground=306, TOTAL=510)

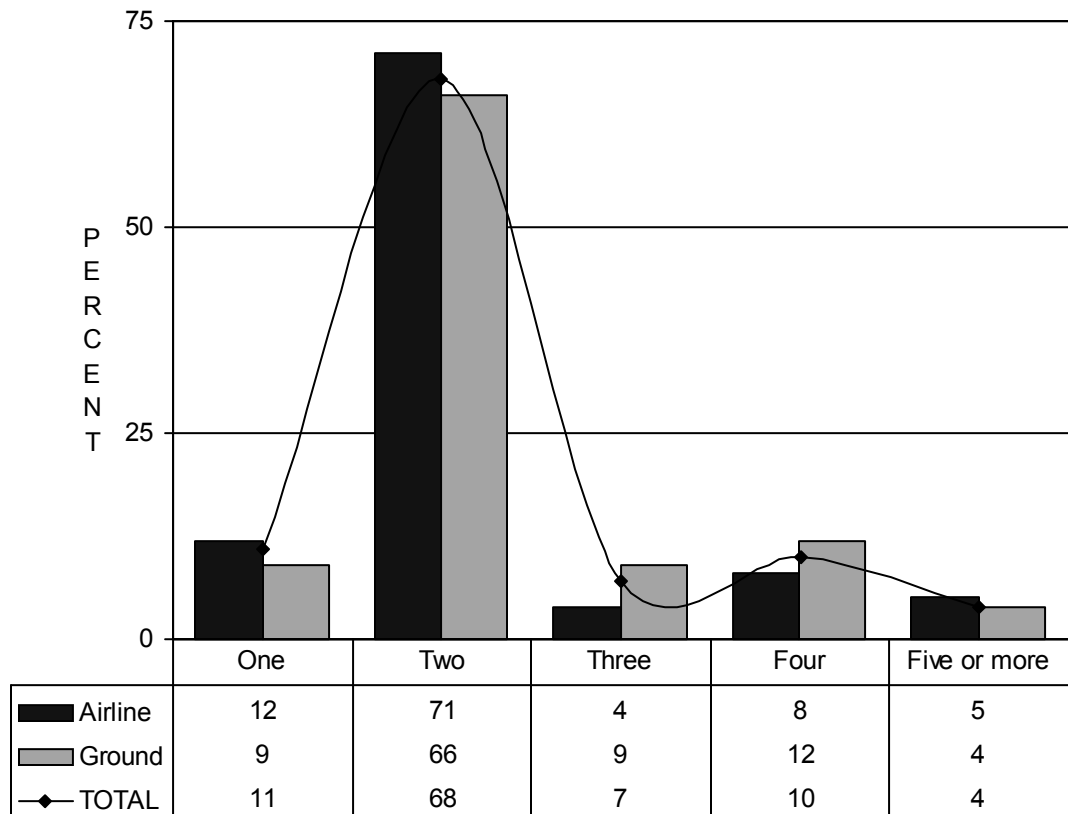
Visitors were asked what other nearby destinations they had visited, or planned to visit (Figure 28). Airline visitors were more likely than those who arrived by ground transportation to visit Lake Mead (37% vs. 27%) or Red Rock (13% vs. 4%), but less likely to visit Zion National Park (6% vs. 19%), Bryce Canyon (4% vs. 13%), or Mesquite (0% vs. 5%).

\* Multiple responses were permitted.

### TRIP CHARACTERISTICS AND EXPENDITURES

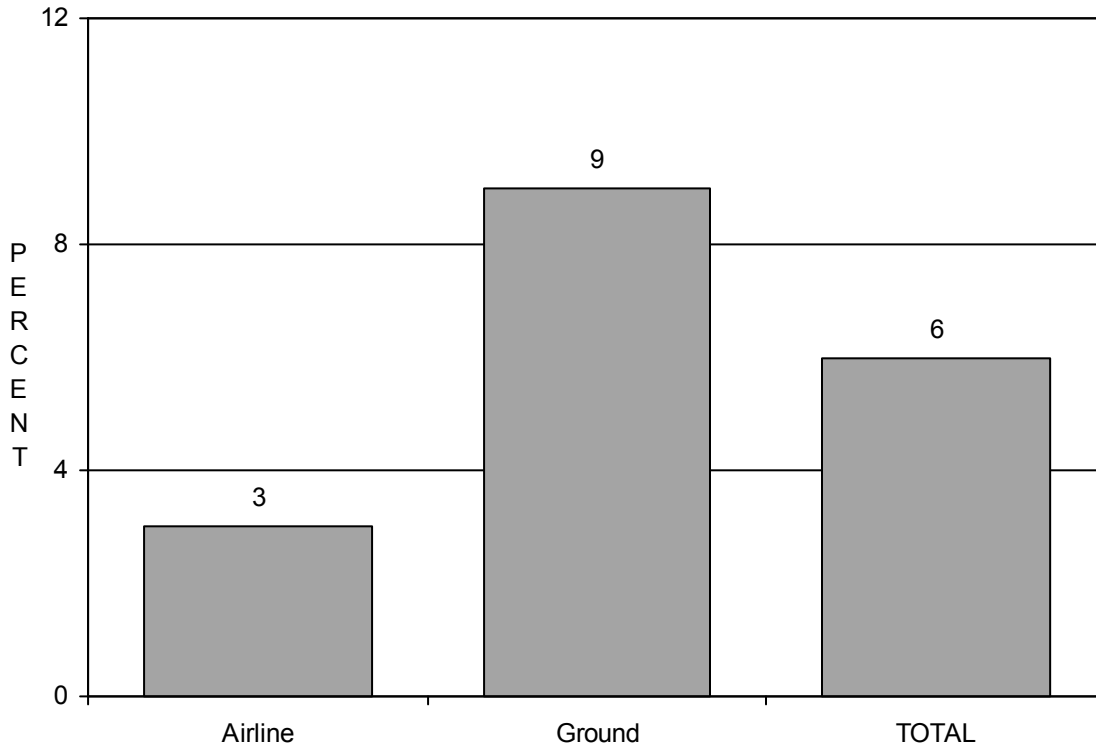
The majority of all visitors (68%) traveled in parties of two (Figure 29). The average party size was 2.4 people, with no significant difference between airline visitors and those who arrived by ground transportation.

FIGURE 29  
Adults In Immediate Party



(Means: Airline=2.3, Ground=2.4, TOTAL=2.4)

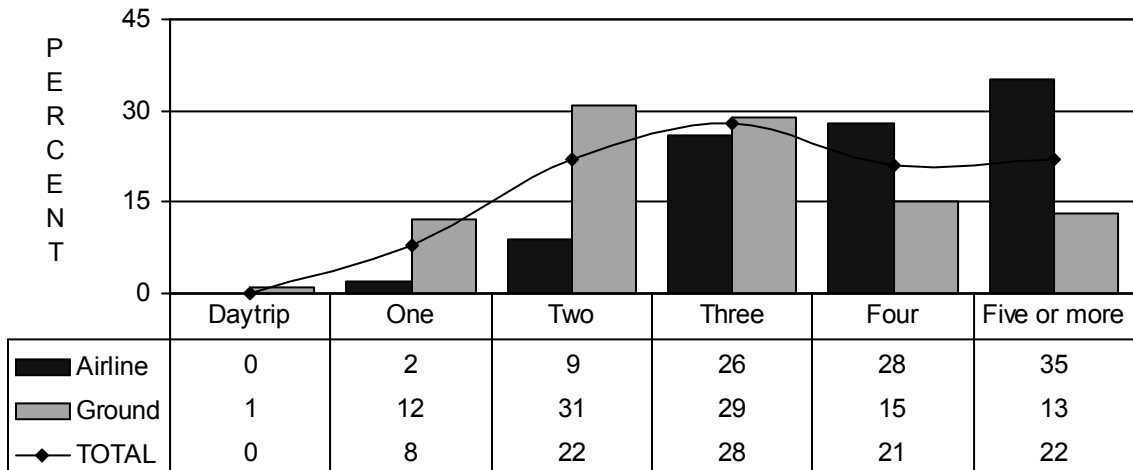
FIGURE 30  
Whether Has Persons In Immediate Party Under Age 21\*  
(Among All Visitors)



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

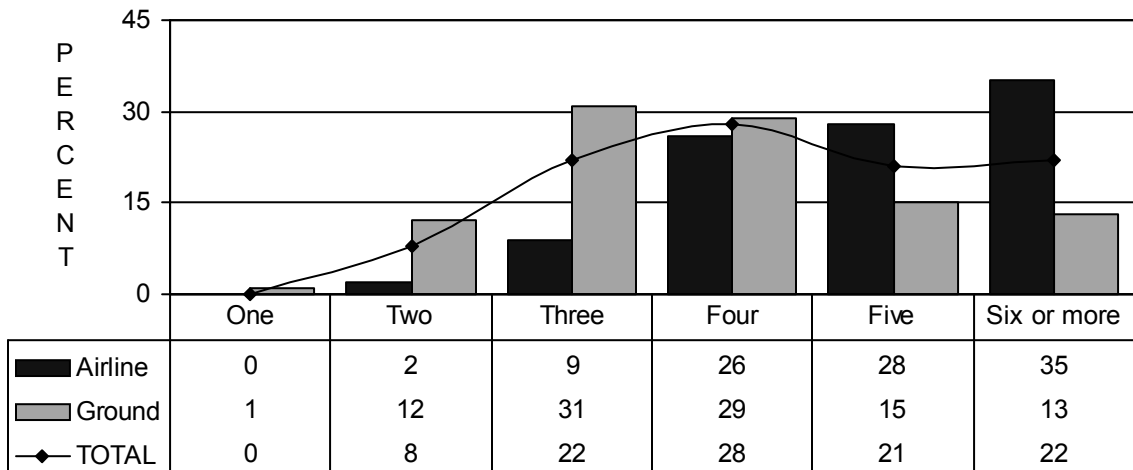
Six percent (6%) of visitors said they were traveling with people under the age of 21 in their party (Figure 30). Airline visitors (3%) were significantly less likely than visitors who arrived by ground transportation (9%) to say there were people under the age of 21 in their party.

FIGURE 31  
Nights Stayed



(Means: Airline=4.3, Ground=3.0, TOTAL=3.5)

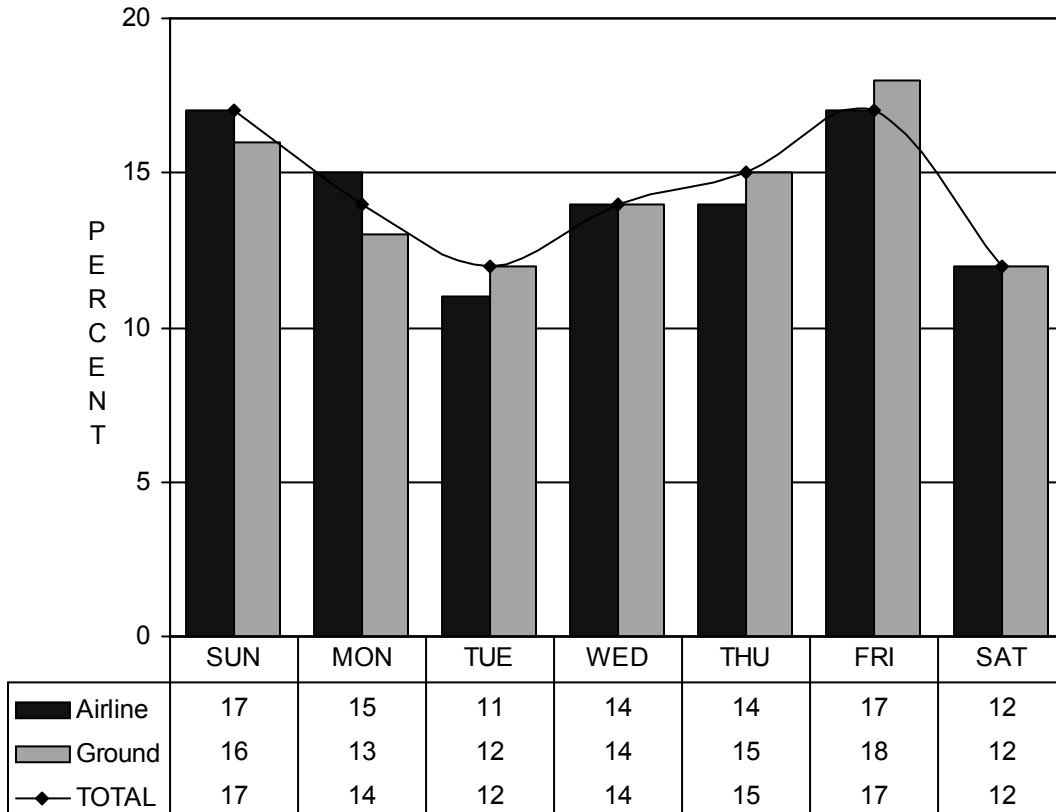
FIGURE 32  
Days Stayed



(Means: Airline=5.3, Ground=4.0, TOTAL=4.5)

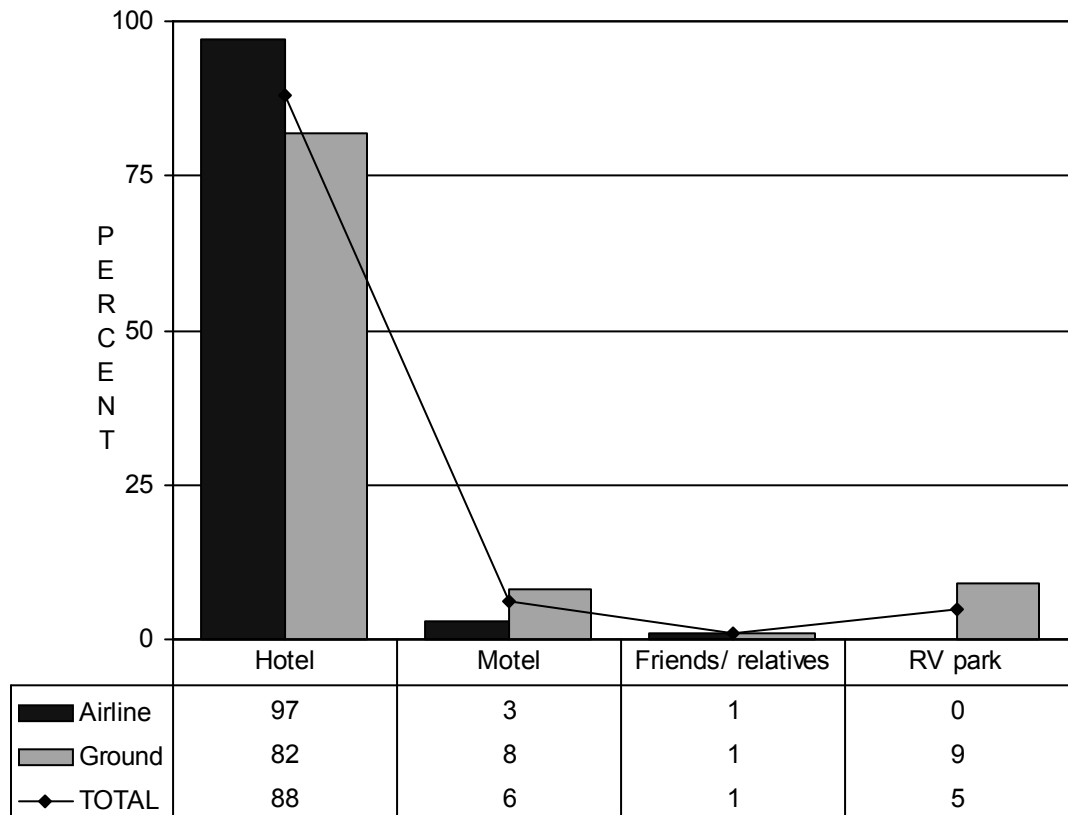
Airline visitors stayed significantly longer in Las Vegas (average of 4.3 nights and 5.3 days) than those who arrived by ground transportation (3.0 nights and 4.0 days) (Figures 31 and 32).

FIGURE 33  
Day Of Arrival



All respondents were asked on what day of the week they arrived in Las Vegas (Figure 33). Visitors were most likely to arrive on a Sunday or a Friday (17% each). There were no significant differences between airline visitors and those who arrived by ground transportation on this measure.

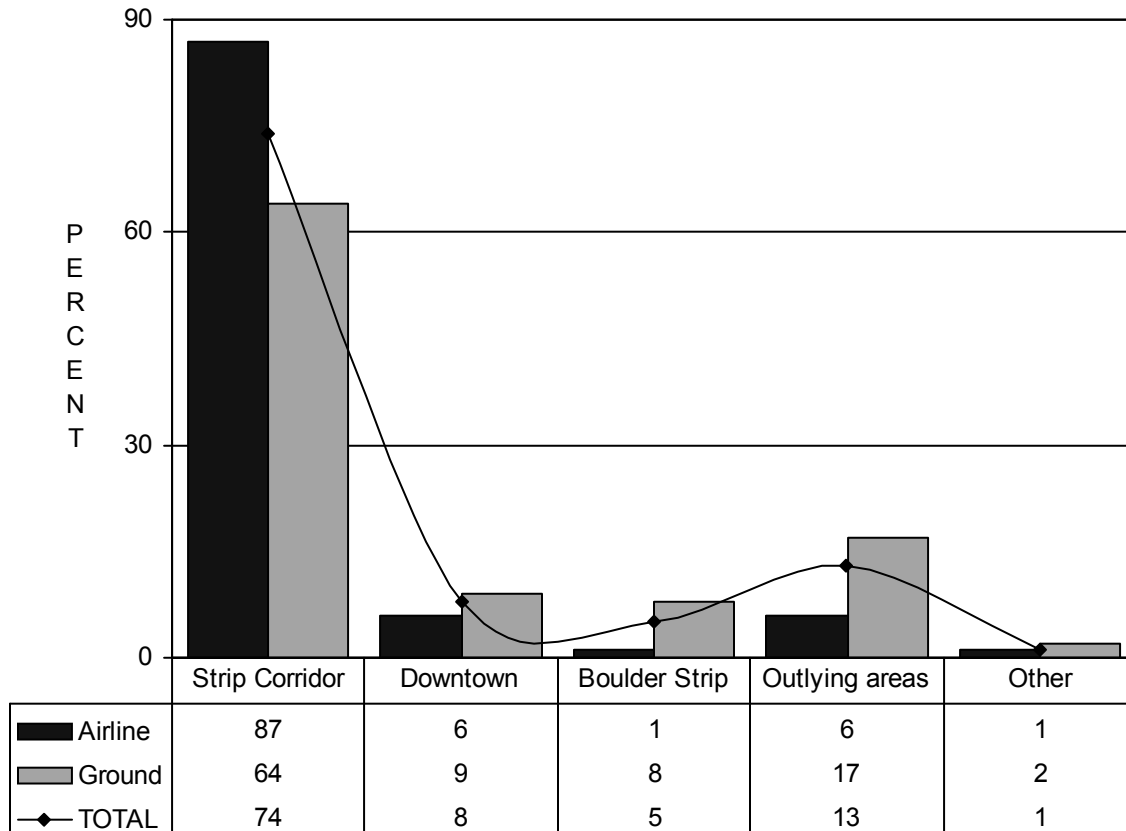
FIGURE 34  
Type Of Lodging  
(Among Those Who Stayed Overnight)



(Base Sizes: Airline=1547, Ground=2039, TOTAL=3587)

As Figure 34 shows, airline visitors (97%) were significantly more likely than those who arrived by ground transportation (82%) to have stayed in a hotel, and less likely than those who arrived by ground transportation to have stayed in a motel (3% vs. 8%) or at an RV park (less than 1% vs. 9%).

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

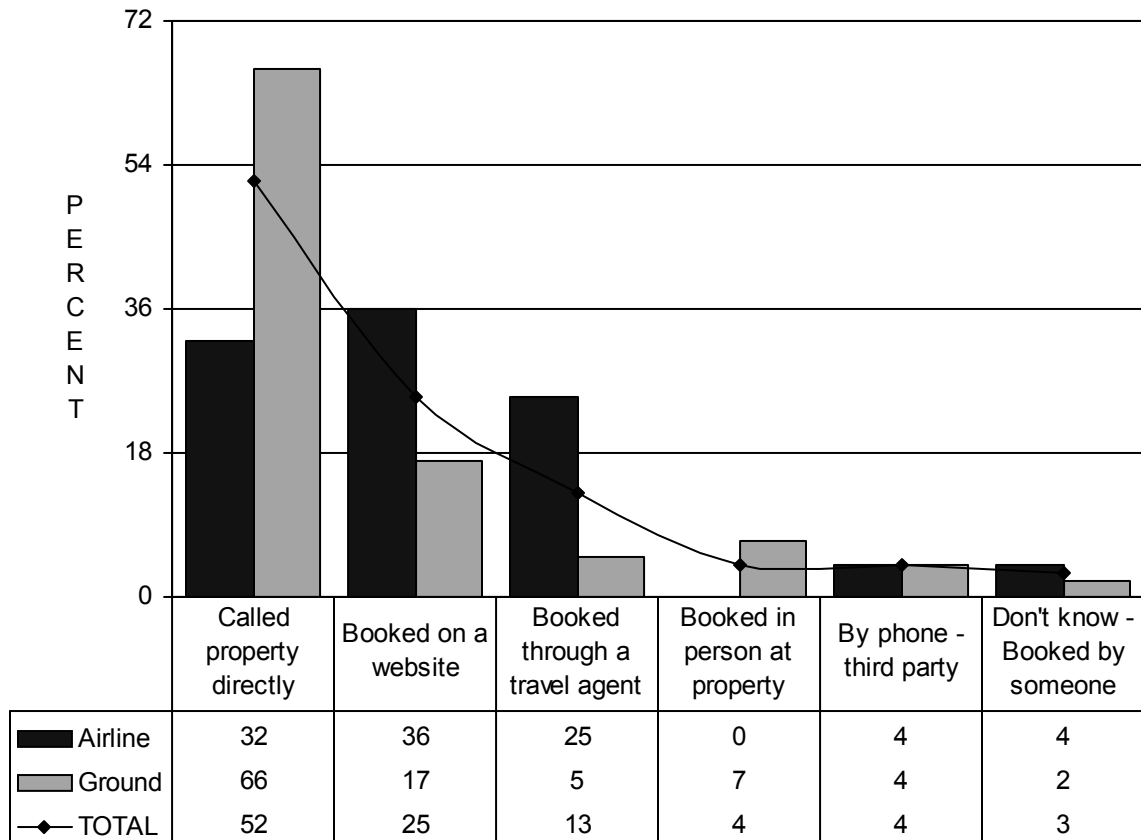


(Base Sizes: Airline=1547, Ground=2039, TOTAL=3587)

In terms of lodging location, airline visitors (87%) were significantly more likely than those who arrived by ground transportation (64%) to stay at a property on the Strip Corridor\* (Figure 35). Those who arrived by ground transportation were more likely than airline visitors to say they stayed Downtown (9% vs. 6%), on the Boulder Strip (8% vs. 1%), or in outlying areas (17% vs. 6%).

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

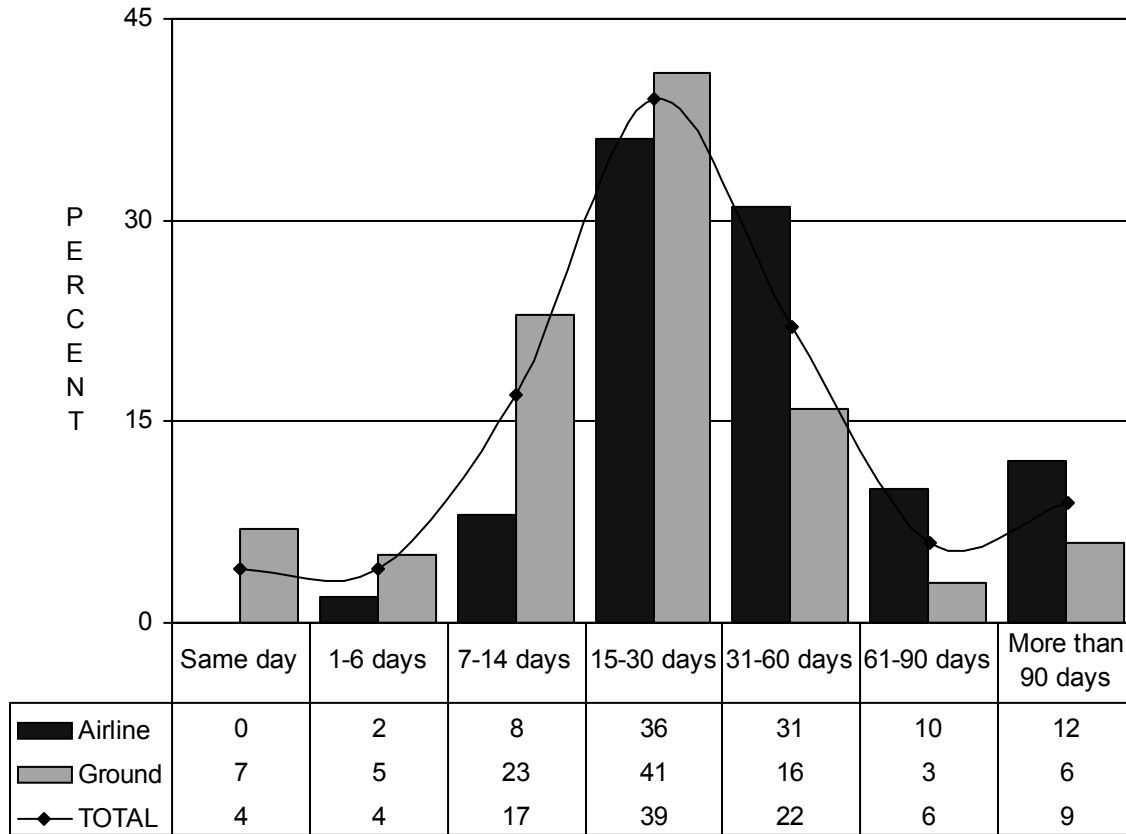
FIGURE 36  
How Booked Accommodations In Las Vegas  
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Airline=1506, Ground=1963, TOTAL=3469)

Visitors who stayed at a hotel, motel, or in an RV park were asked how they, or someone in their party, booked their accommodations in Las Vegas for their most recent trip (Figure 36). Airline visitors were significantly more likely than those who arrived by ground transportation to say they had booked their accommodations either online at a website (36% vs. 17%) or through a travel agent (25% vs. 5%). By contrast, those who arrived by ground transportation were more likely than airline visitors to say they called the property directly (66% vs. 32%), or booked their accommodations in person (7% vs. less than 1%).

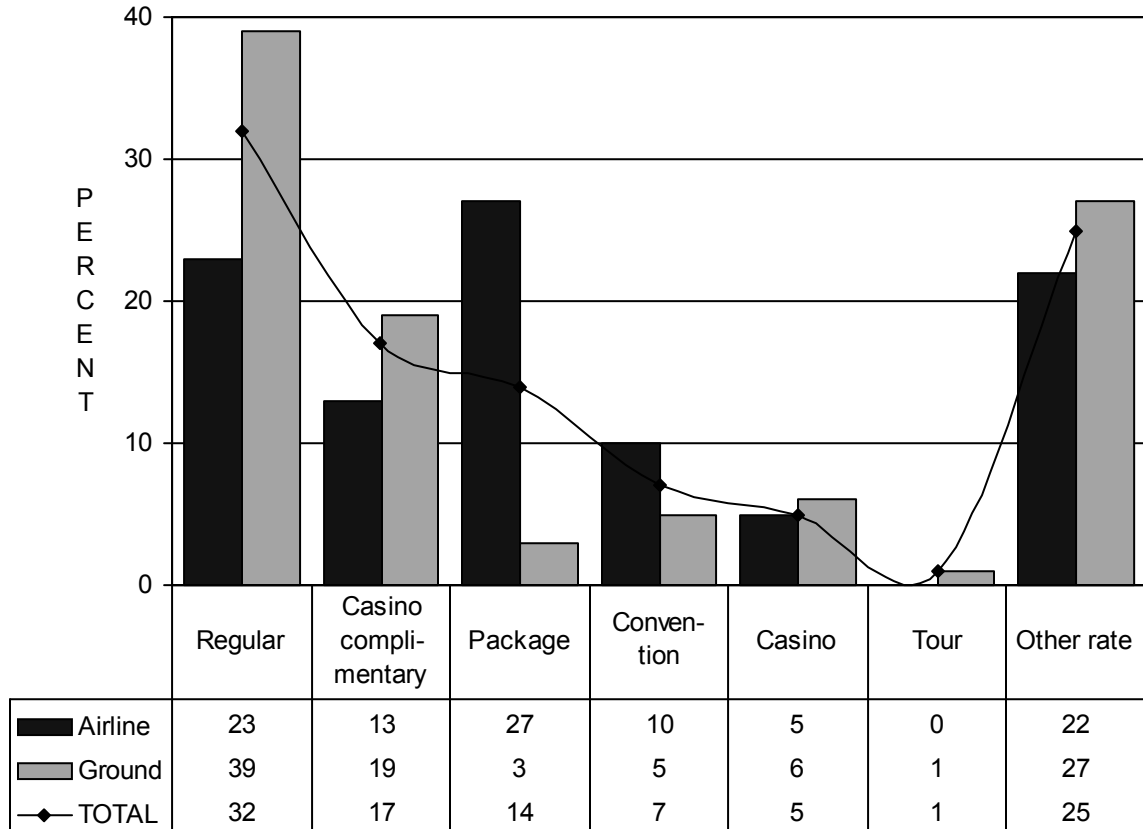
FIGURE 37  
Advance Booking Of Accommodations  
(Among Those Who Stayed In A Hotel/Motel/RV Park)



(Base Sizes: Airline=1506, Ground=1963, TOTAL=3469)

Airline visitors booked their accommodations further in advance than those who arrived by ground transportation (Figure 37). For example, 53% of airline visitors booked their accommodations 31 or more days in advance compared to 25% of those who arrived by ground transportation. Visitors who arrived by ground transportation were more likely than airline visitors to have booked their accommodations a month or less before their arrival (76% vs. 46%).

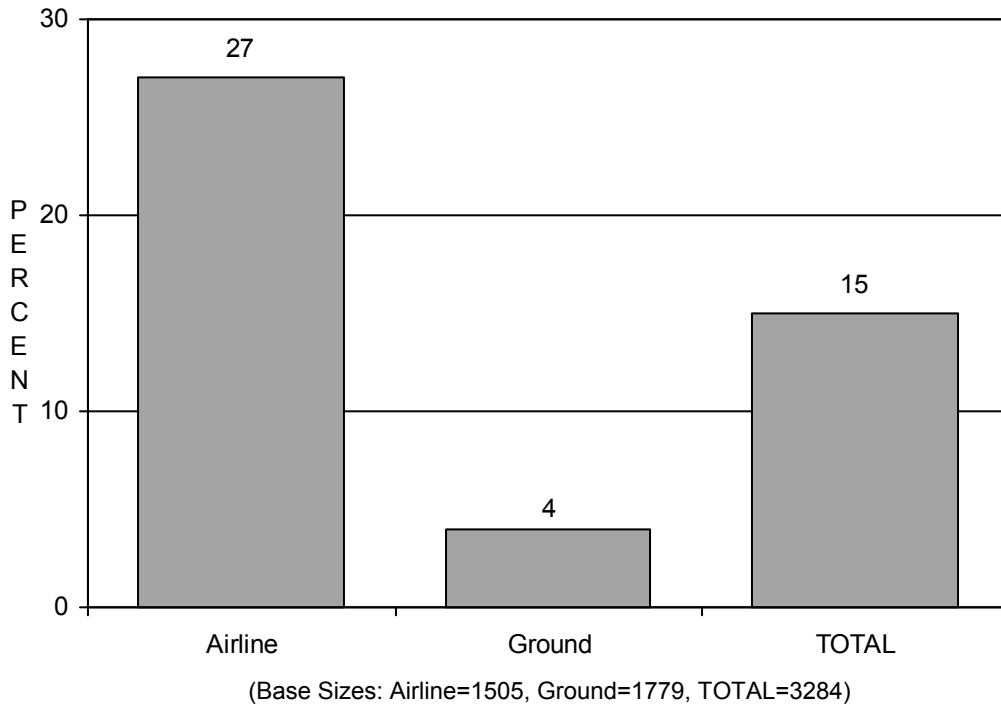
FIGURE 38  
Type Of Room Rates  
(Among Those Staying In A Hotel Or Motel)



(Base Sizes: Airline=1505, Ground=1779, TOTAL=3284)

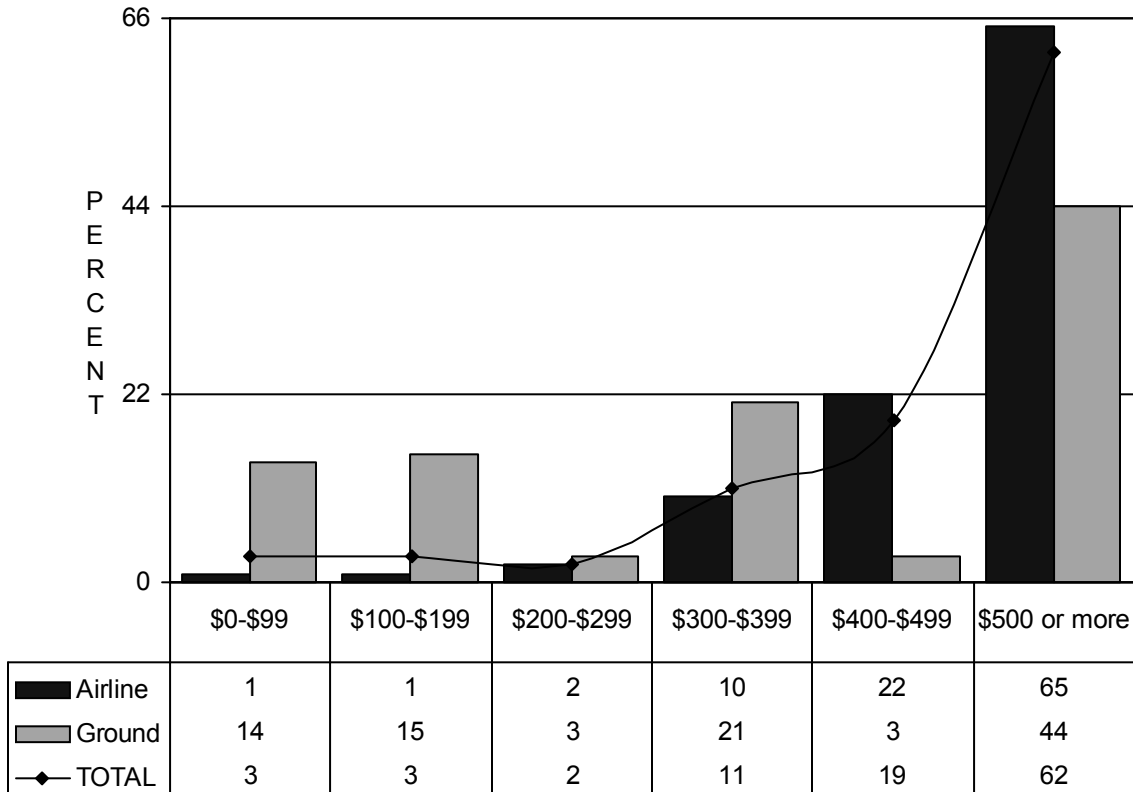
Looking at the type of room rates received by hotel/motel lodgers, visitors who arrived by ground transportation were significantly more likely than airline visitors to have paid a regular room rate (39% vs. 23%), a casino complimentary rate (19% vs. 13%), or to have paid some other kind of rate (27% vs. 22%) (Figure 38). As might be expected, airline visitors (27%) were much more likely than those who arrived by ground transportation (3%) to say their accommodations were part of a package deal. Airline visitors were also more likely than those who arrived by ground transportation to say they paid a convention rate (10% vs. 5%).

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



Airline visitors were significantly more likely than those who arrived by ground transportation to be visiting Las Vegas as part of a tour group or package deal (27% vs. 4%) (Figure 39).

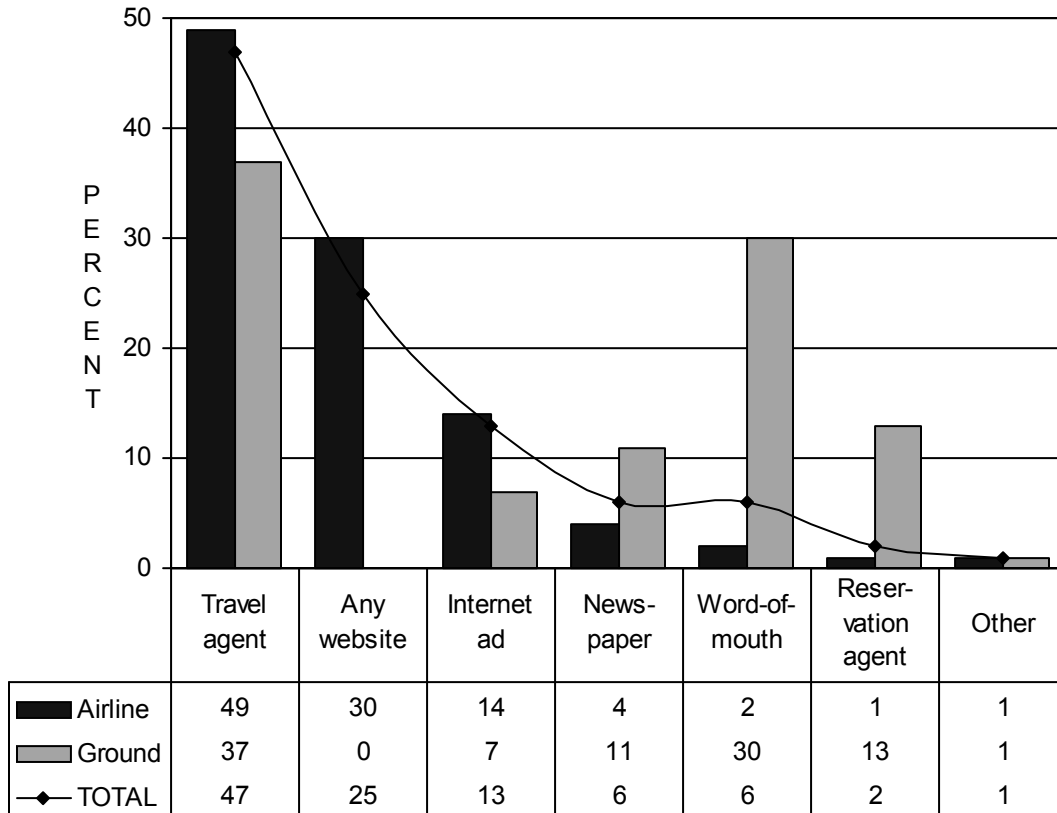
FIGURE 40  
Cost Of Package Per Person  
(Among Those Who Bought A Package)



(Base Sizes: Airline=412, Ground=74, TOTAL=485)  
(Mean: Airline=\$741.09, Ground=\$777.88, TOTAL=\$746.69)

We asked those who purchased either a hotel or a tour/travel group package how much their package cost per person (Figure 40). The average package cost was \$746.69. The difference between the cost for airline visitors (\$741.09) and those who traveled to Las Vegas by other means (\$777.88) was not statistically significant.

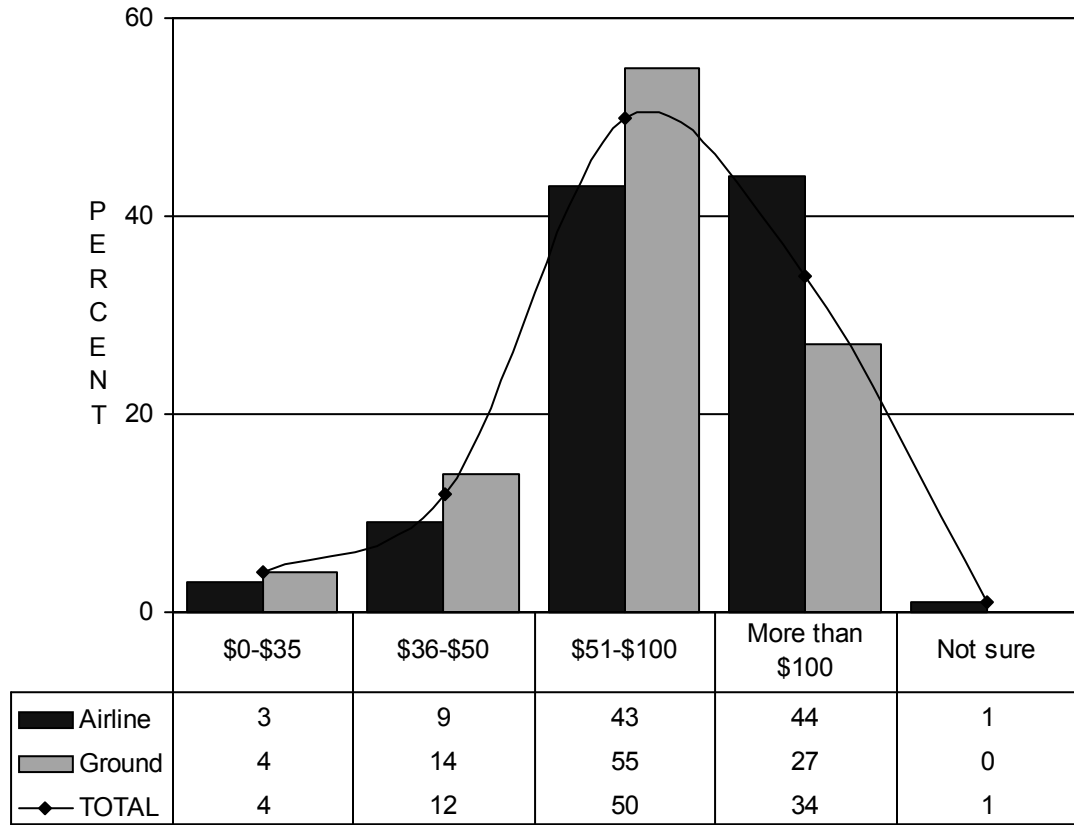
FIGURE 41  
Where First Heard About The Package  
(Among Those Who Bought A Package)



(Base Sizes: Airline=412, Ground=74, TOTAL=485)

Package purchasers were asked where they first heard about the package they bought (Figure 41). Overall, nearly one-half (47%) of visitors first heard about their rate through a travel agent, 25% on a website, and 13% through an internet ad. Those who arrived by ground transportation were more likely than airline visitors to have first heard about the package by word-of-mouth (30% vs. 2%), while those who arrived by air were more likely than those who arrived by ground transportation to have first heard of the package at a website (30% vs. 0%).

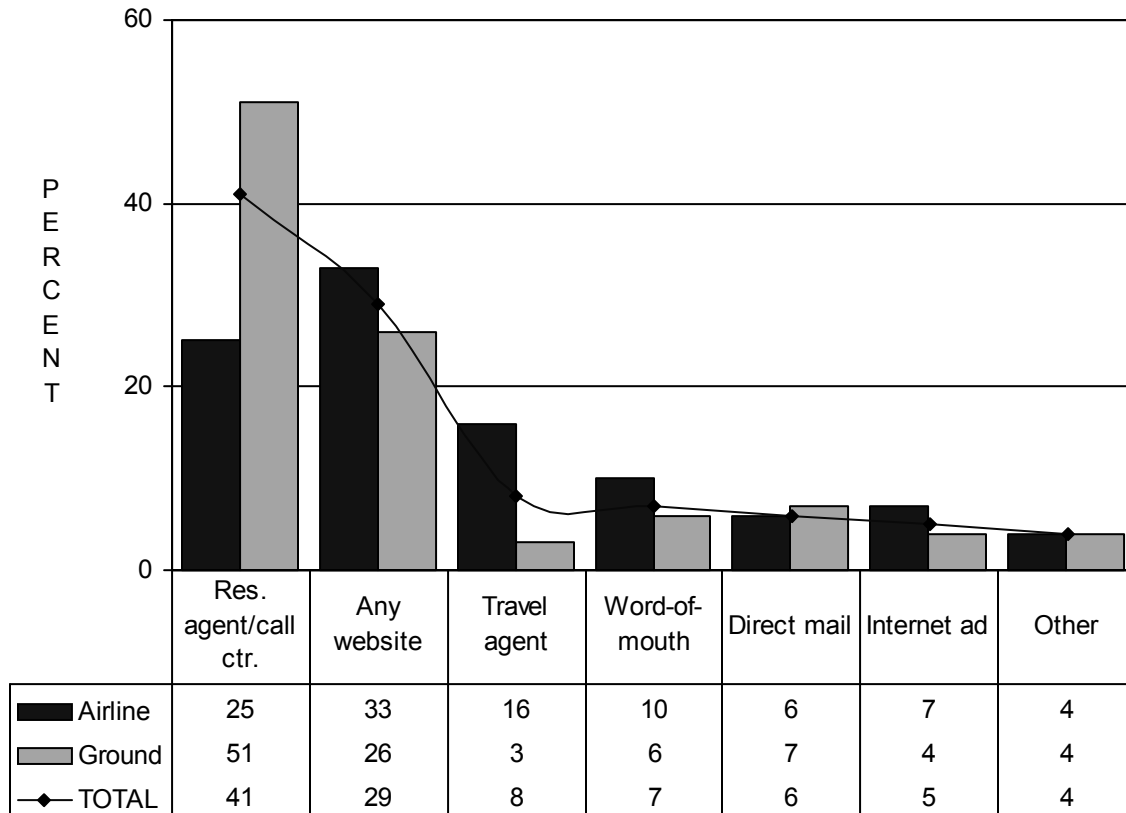
FIGURE 42  
Lodging Expenditures — Average Per Night  
(Among Those Staying In A Hotel Or Motel/Non-Package)



(Base Sizes: Airline=891, Ground=1363, TOTAL=2254)  
(Means: Airline=\$114.57, Ground=\$93.32, TOTAL=\$101.68)

We looked at lodging expenditures among visitors whose room was *not* part of a travel package (Figure 42). Airline visitors paid significantly more for lodging (average of \$114.57) than those who arrived by ground transportation (\$93.32).

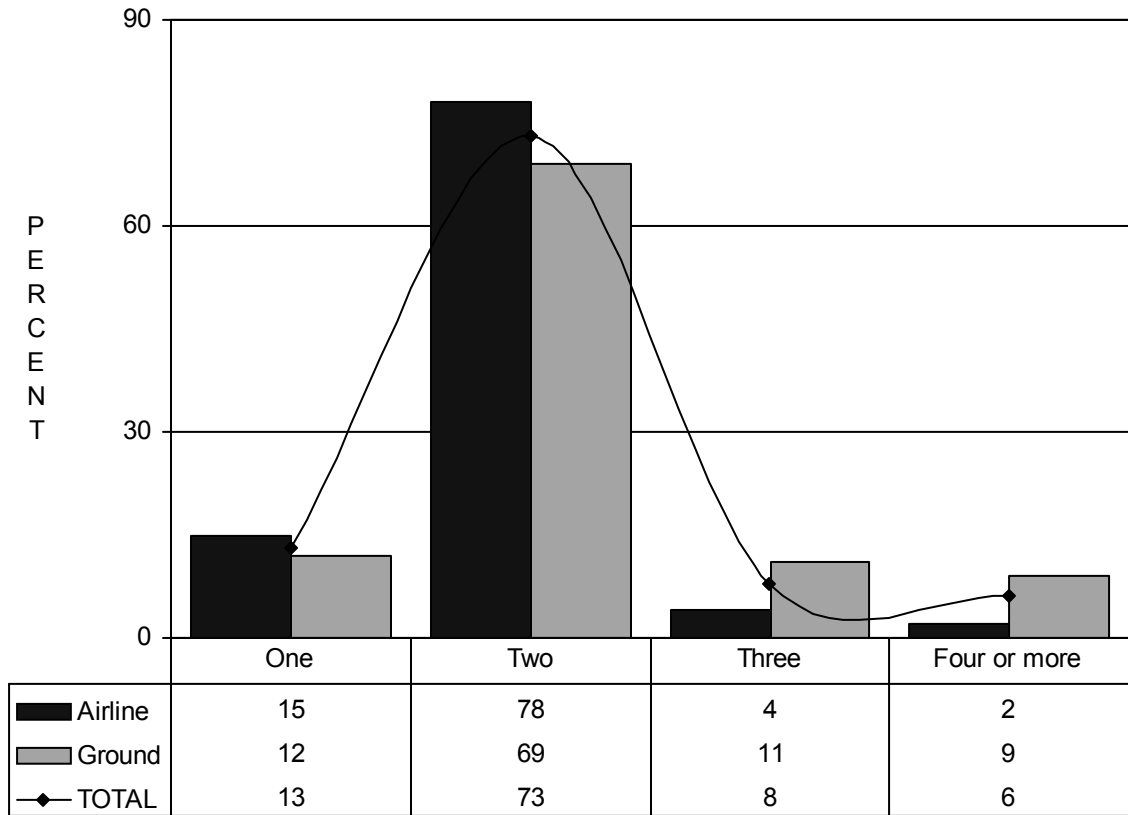
FIGURE 43  
How First Found Out About Room Rate  
(Among Those Staying In A Hotel Or Motel/Non-Package)



(Base Sizes: Airline=891, Ground=1363, TOTAL=2254)

Visitors were asked how they first found out about the room rate they paid (Figure 43). Airline visitors were significantly more likely than those who arrived by ground transportation to say they initially found out about their room rate through a website (33% vs. 26%), through a travel agent (16% vs. 3%), through word of mouth (10% vs. 6%), or through an Internet ad (7% vs. 4%). Those who arrived by ground transportation were more likely than airline visitors to say they first found out about the rate through a reservations agent (51% vs. 25%).

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



(Base Sizes: Airline=1537, Ground=1825, TOTAL=3362)  
(Means: Airline=1.9, Ground=2.2, TOTAL=2.1)

Looking only at visitors who stayed in a hotel or motel, airline visitors (78%) were significantly more likely than those who arrived by ground transportation (69%) to say two people stayed in their room (Figure 44). Airline visitors were also more likely than those who arrived by ground transportation to say they were staying alone (15% vs. 12%). By contrast, those who arrived by ground transportation were more likely than airline visitors to say three or more people stayed in their room (20% vs. 6%). The average number of room occupants was significantly greater for those who arrived by ground transportation (average of 2.2 room occupants) than for airline visitors (1.9).

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

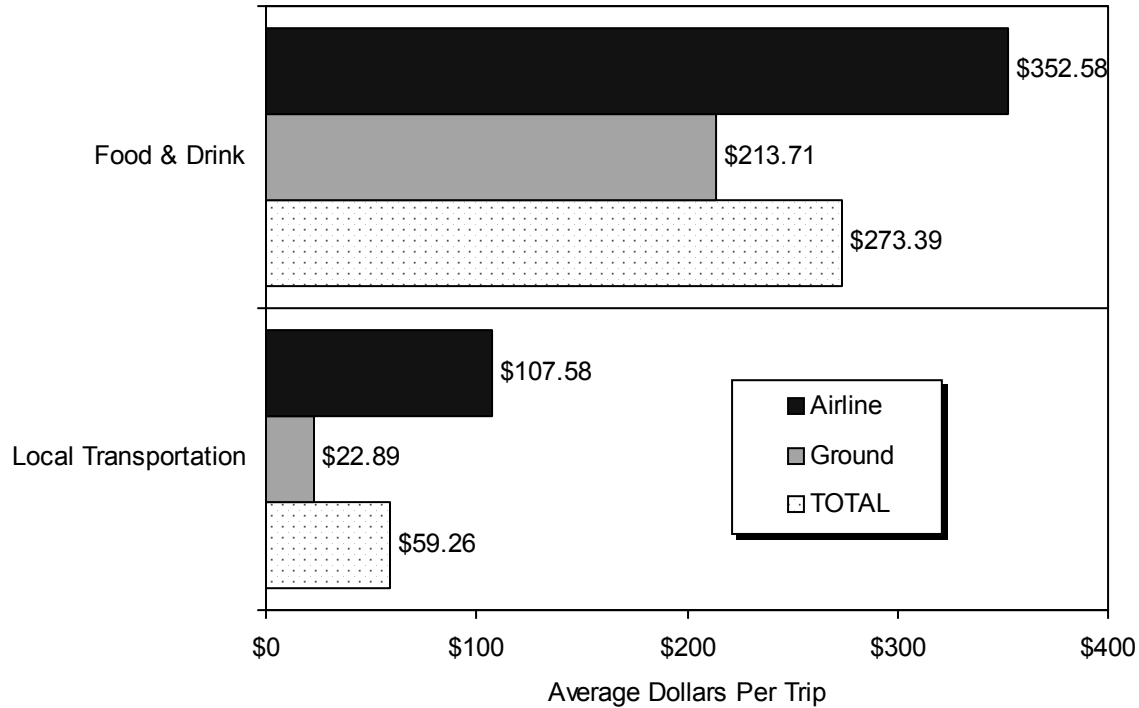
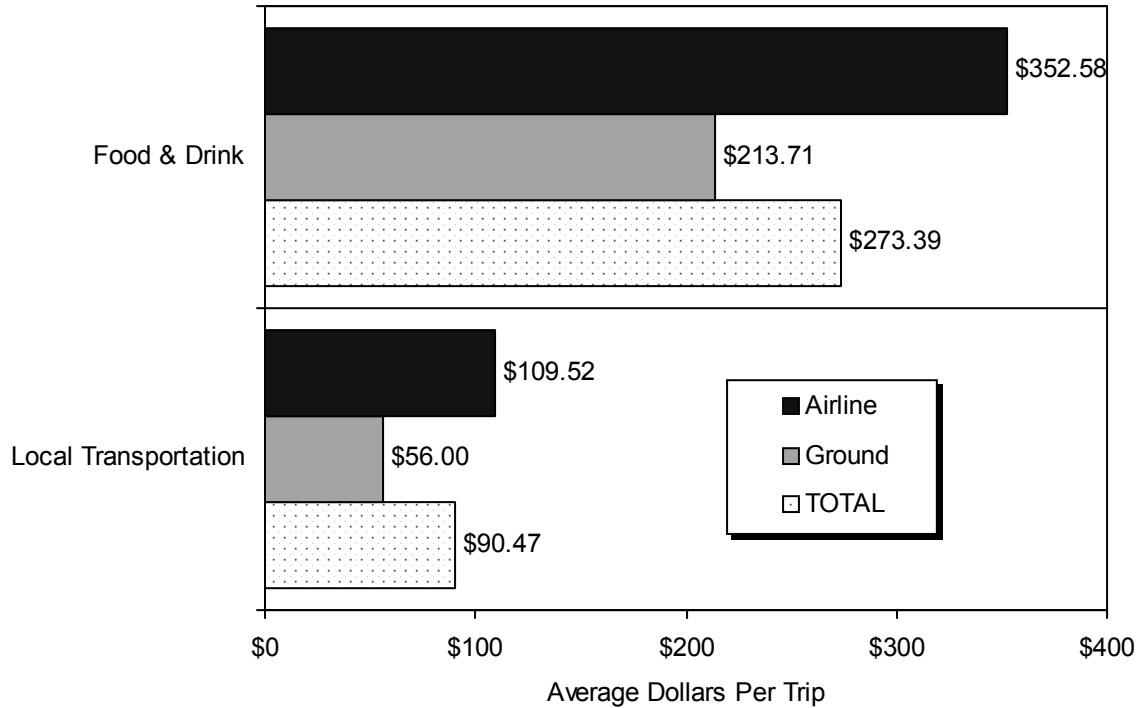


Figure 45 shows the average trip expenditures on food and drink and on local transportation *including visitors who said they spent nothing in these categories*. The average expenditures for food and drink was significantly higher for airline visitors (\$352.58) than for those who arrived by ground transportation (\$213.71). Similarly, the average expenditures for local transportation was significantly greater for airline visitors (\$107.58) than for those who arrived by ground transportation (\$22.89).

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



(Base Sizes, Food & Drink: Airline=1548, Ground=2054, TOTAL=3601)  
 (Base Sizes, Local Transportation: Airline=1519, Ground =839, TOTAL=2358)

Looking only at *visitors who actually spent money* in these categories, airline visitors spent significantly more on food and drink (average trip expenditures of \$352.58) and local transportation (\$109.52) than those who arrived by ground transportation (\$213.71 for food and drink and \$56.00 for local transportation) (Figure 46).

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

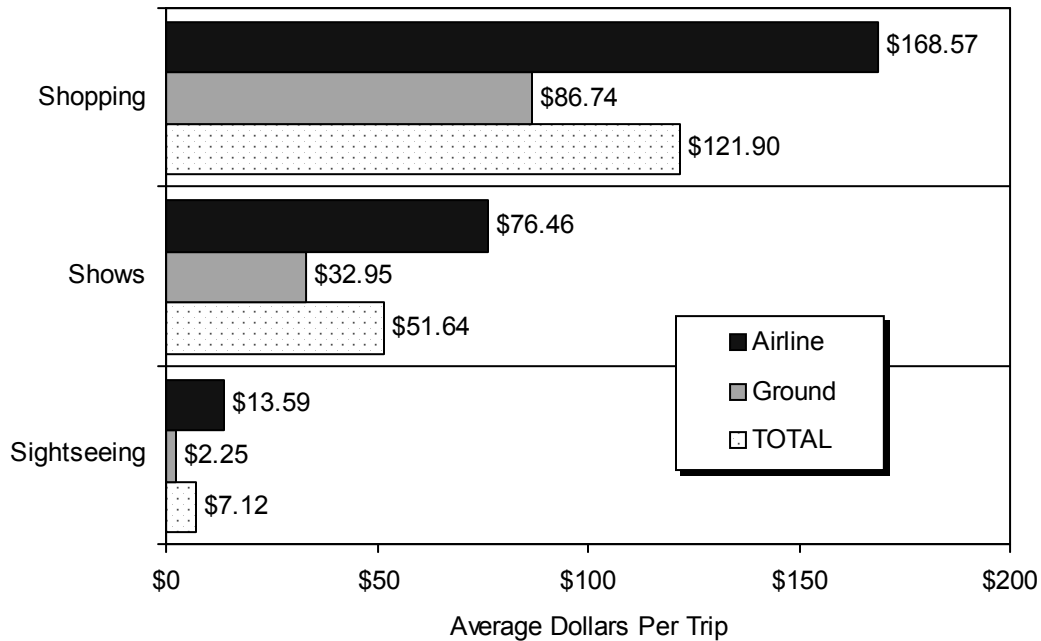
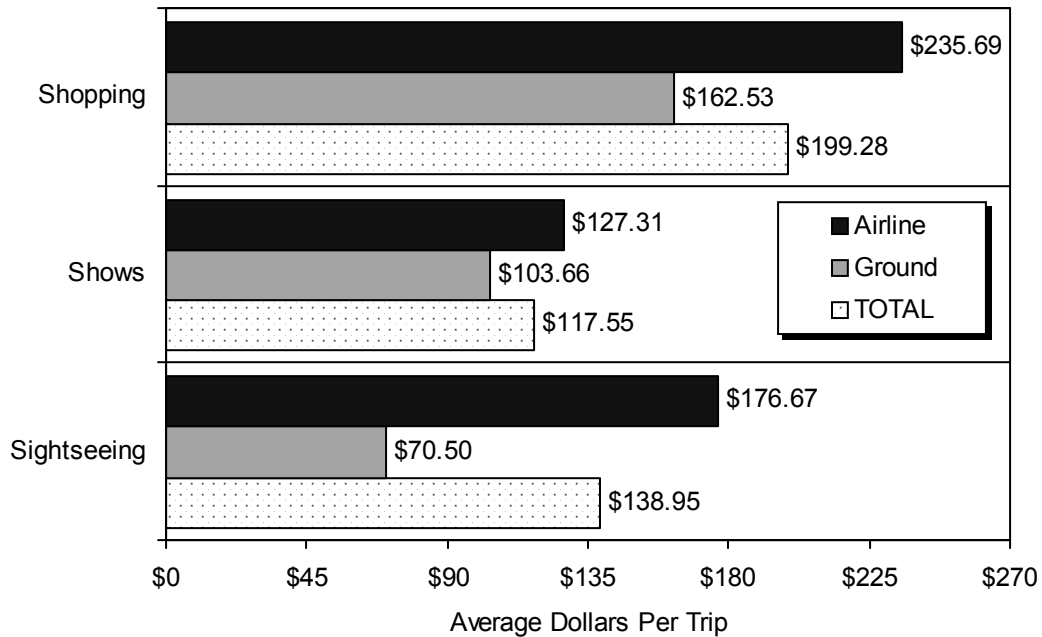


Figure 47 shows average per trip expenditures on shopping, shows, and sightseeing during the entire visit to Las Vegas, *including visitors who said they spent nothing* in these categories. Airline visitors spent significantly more than those who arrived by ground transportation in all three categories. Specifically, airline visitors spent an average of \$168.57 on shopping, \$76.46 on shows, and \$13.59 on sightseeing. Among visitors who arrived by ground transportation, the average totals spent were \$86.74 on shopping, \$32.95 on shows, and \$2.25 on sightseeing.

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



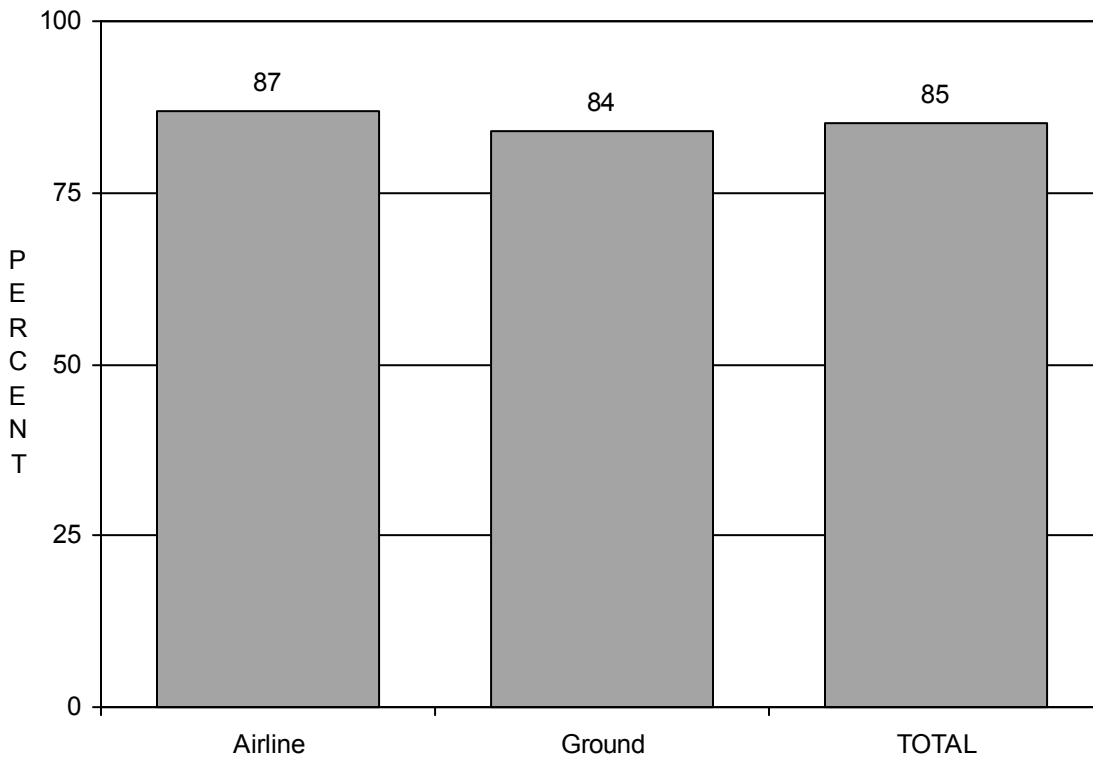
(Base Sizes, Shopping: Airline=1107, Ground=1096, TOTAL=2203)  
 (Base Sizes, Shows: Airline=929, Ground=653, TOTAL=1582)  
 (Base Sizes, Sightseeing: Airline=119, Ground=66, TOTAL=185)

Among visitors who spent money in these categories (Figure 48), airline visitors spent significantly more than those who arrived by ground transportation on shopping, shows, and sightseeing. Specifically, airline visitors spent an average of \$235.69 for shopping, \$127.31 on shows, and \$176.67 on sightseeing. Visitors who arrived by ground transportation spent an average of \$162.53 for shopping, \$103.66 on shows, and \$70.50 on sightseeing.

### GAMING BEHAVIOR AND BUDGETS

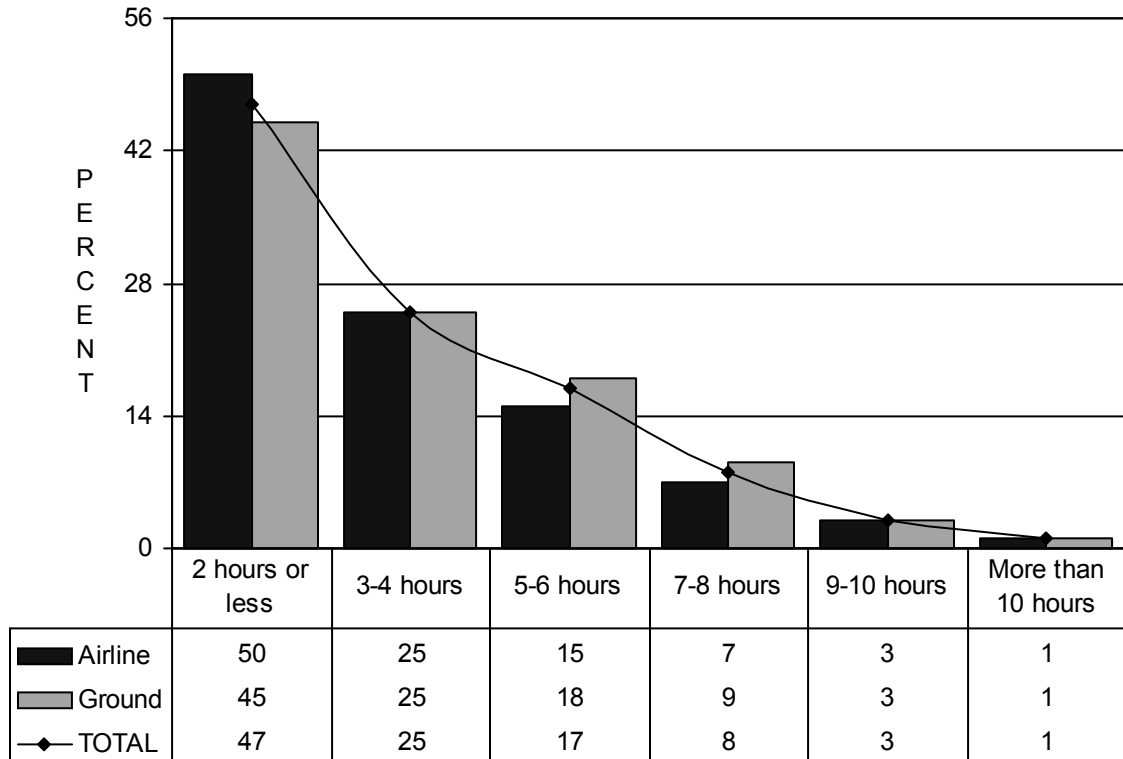
Eighty-five percent (85%) of all Las Vegas visitors gambled while in Las Vegas (Figure 49). Airline visitors (87%) were significantly more likely to have gambled than those who arrived by ground transportation (84%).

FIGURE 49  
Whether Gambled While In Las Vegas\*



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

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

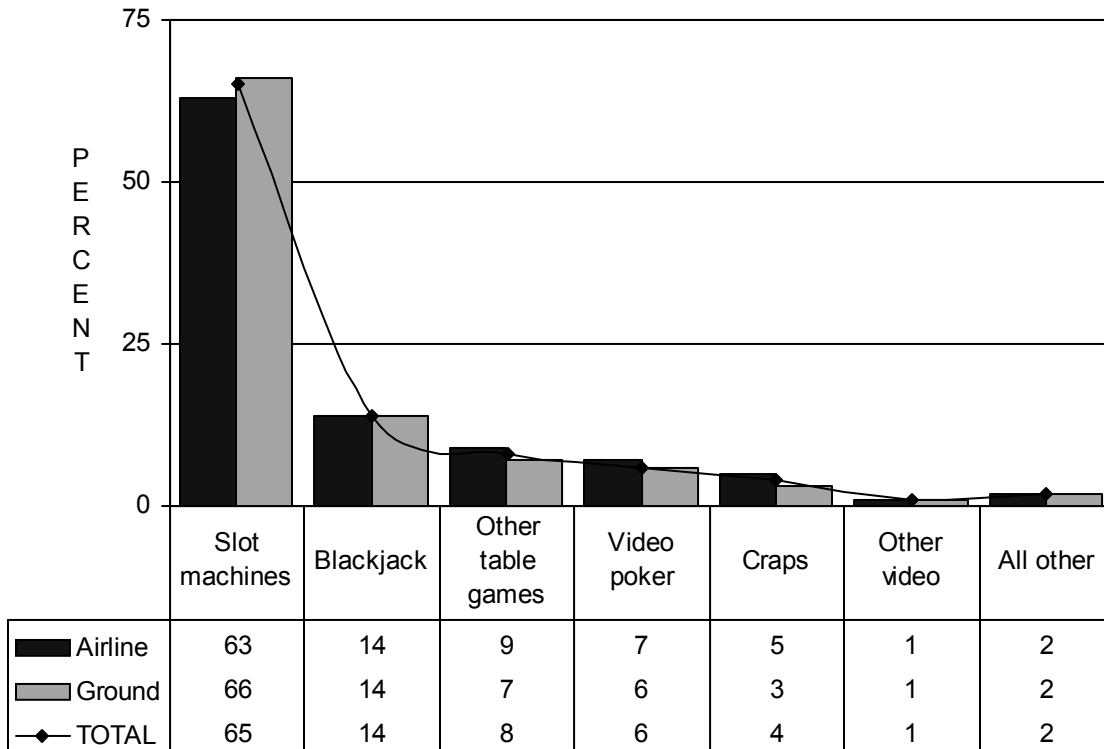


(Base Sizes: Airline=1343, Ground=1717, TOTAL=3060)

(Means: Airline=3.1, Ground=3.4, TOTAL=3.3)

Overall, visitors to Las Vegas averaged 3.3 hours of gambling per day (Figure 50). Those who arrived by ground transportation spent more time gambling on average than airline visitors (3.4 hours per day vs. 3.1).

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

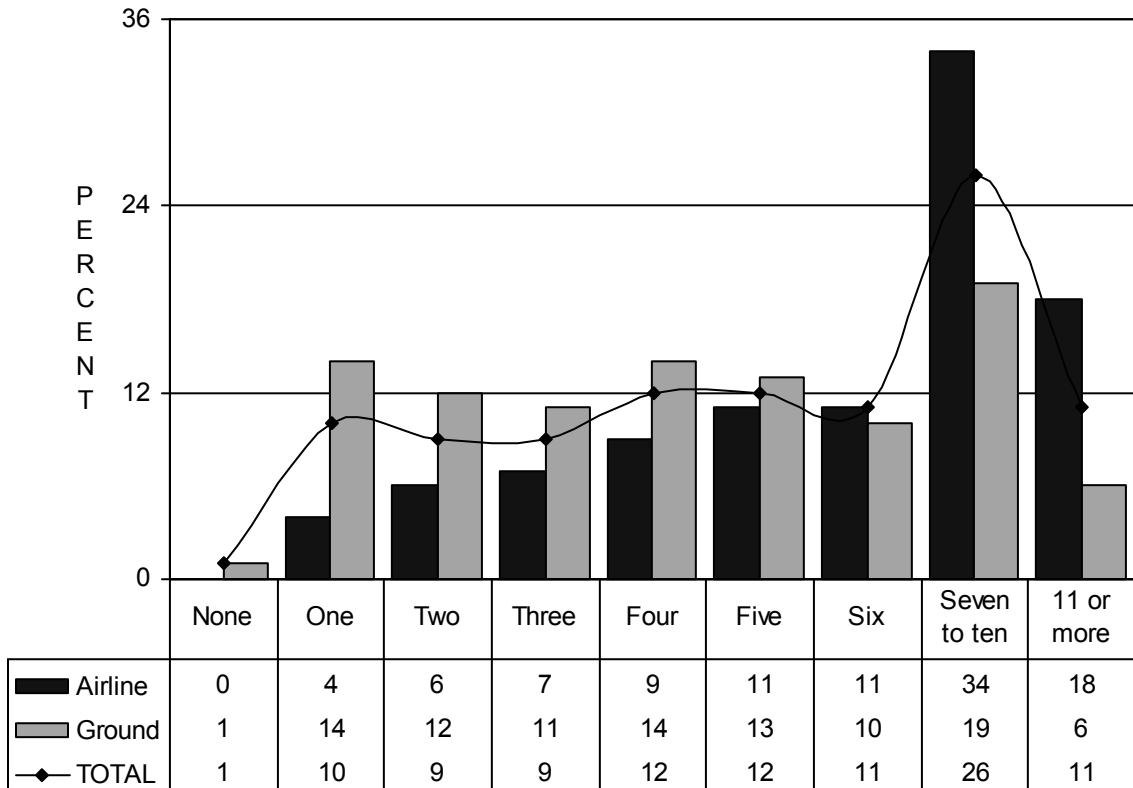


(Base Sizes: Airline=1398, Ground=1624, TOTAL=3023)

Those who gambled on their current trip to Las Vegas were asked which casino game they played the most often (Figure 51). Slots were mentioned the most often by 65% of gamblers, followed at some distance by blackjack (14%), video poker (6%), and craps (4%). There were no significant differences between visitors who arrived by air or ground transportation.

\* These results are from 2007. This question is asked every other year and was not asked in 2008.

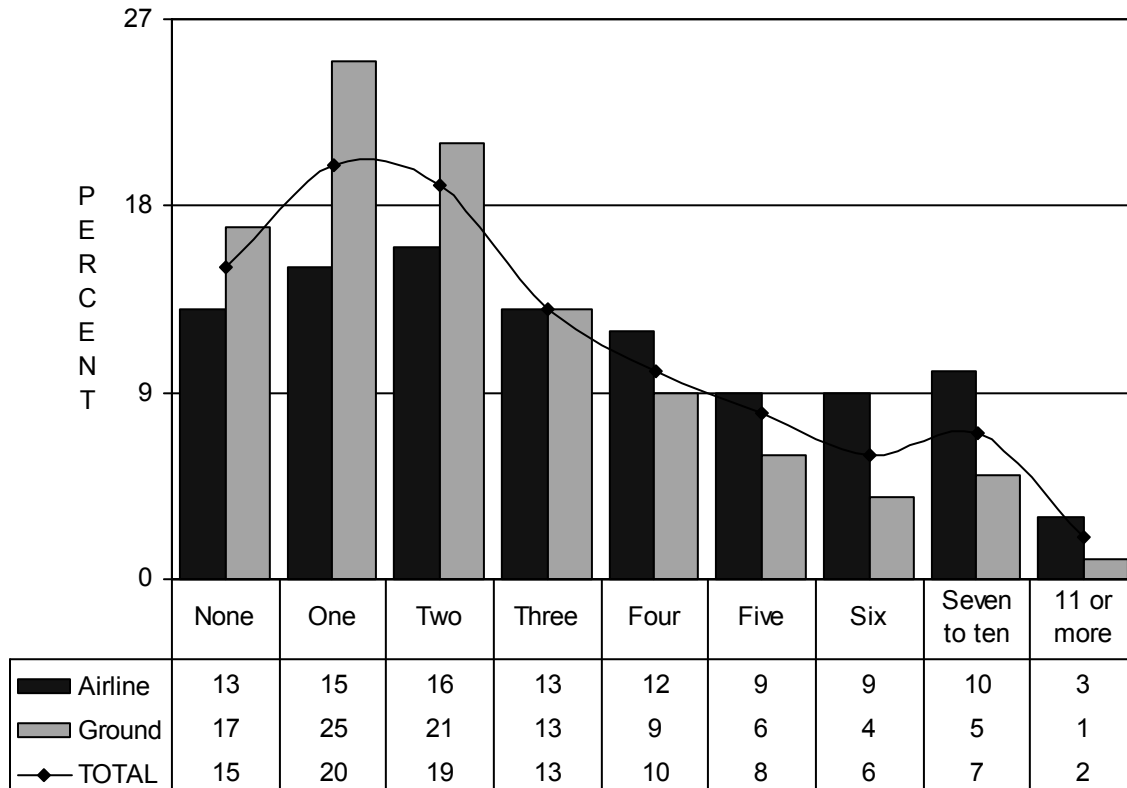
FIGURE 52  
 Number Of Casinos Visited



(Means: Air=7.6, Ground=5.1, TOTAL=6.2)

All visitors to Las Vegas were asked how many casinos they had visited (Figure 52). Airline visitors visited significantly more casinos on average than those who arrived by ground transportation (7.6 vs. 5.1).

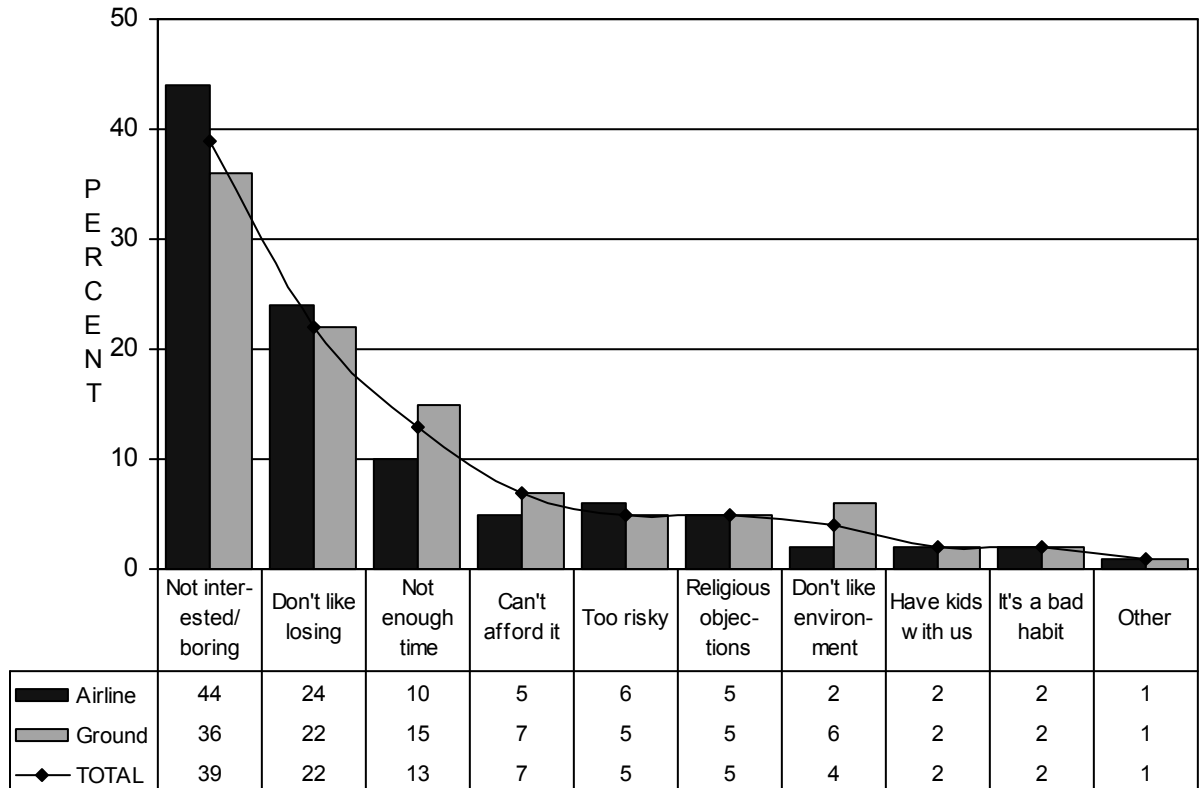
FIGURE 53  
Number Of Casinos Where Gambled



(Means: Air=3.6, Ground=2.6, TOTAL=3.0)

All visitors to Las Vegas were asked in how many casinos they had gambled (Figure 53). Airline visitors gambled in significantly more casinos on average than those who arrived by ground transportation (3.6 vs. 2.6).

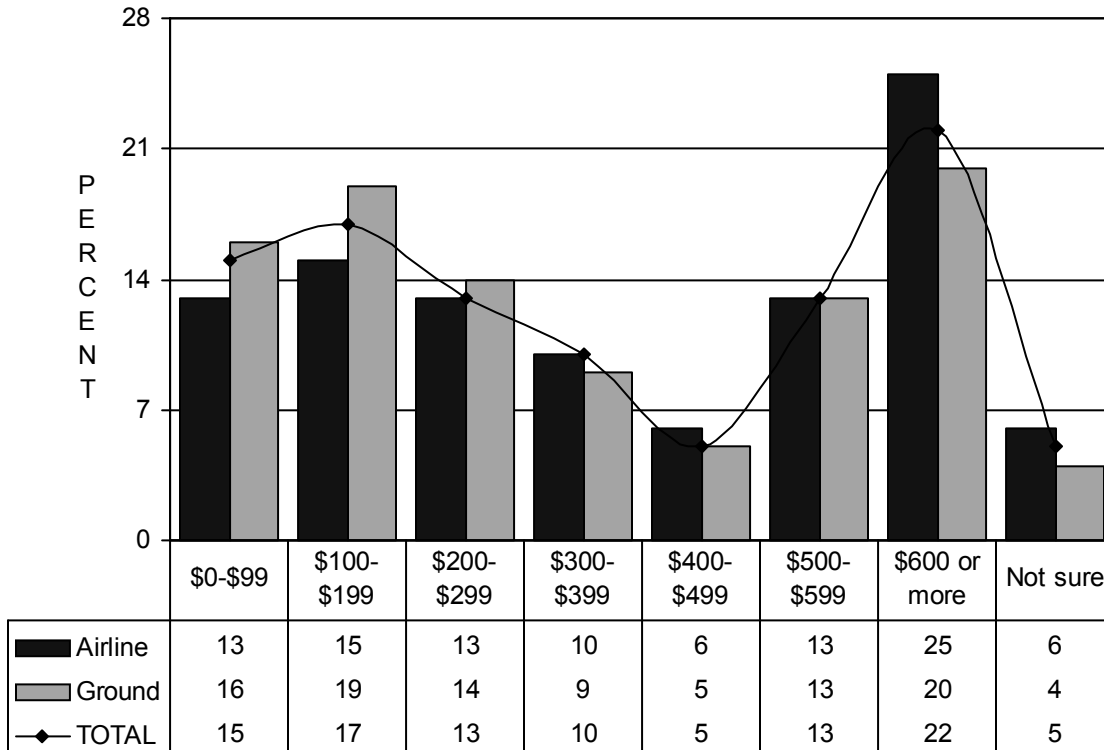
FIGURE 54  
Main Reason For Not Gambling  
(Among Those Who Did Not Gamble)



(Base Sizes: Air=205, Ground=337, TOTAL=541)

Visitors who did not gamble were asked why (Figure 54). The largest numbers of these visitors said they were not interested in gambling or found it boring (39%). Another 22% said they didn't like losing, while 13% said they didn't have enough time for gambling, and 7% said they could not afford to gamble. There were no significant differences between airline visitors and those who arrived by ground transportation on this measure.

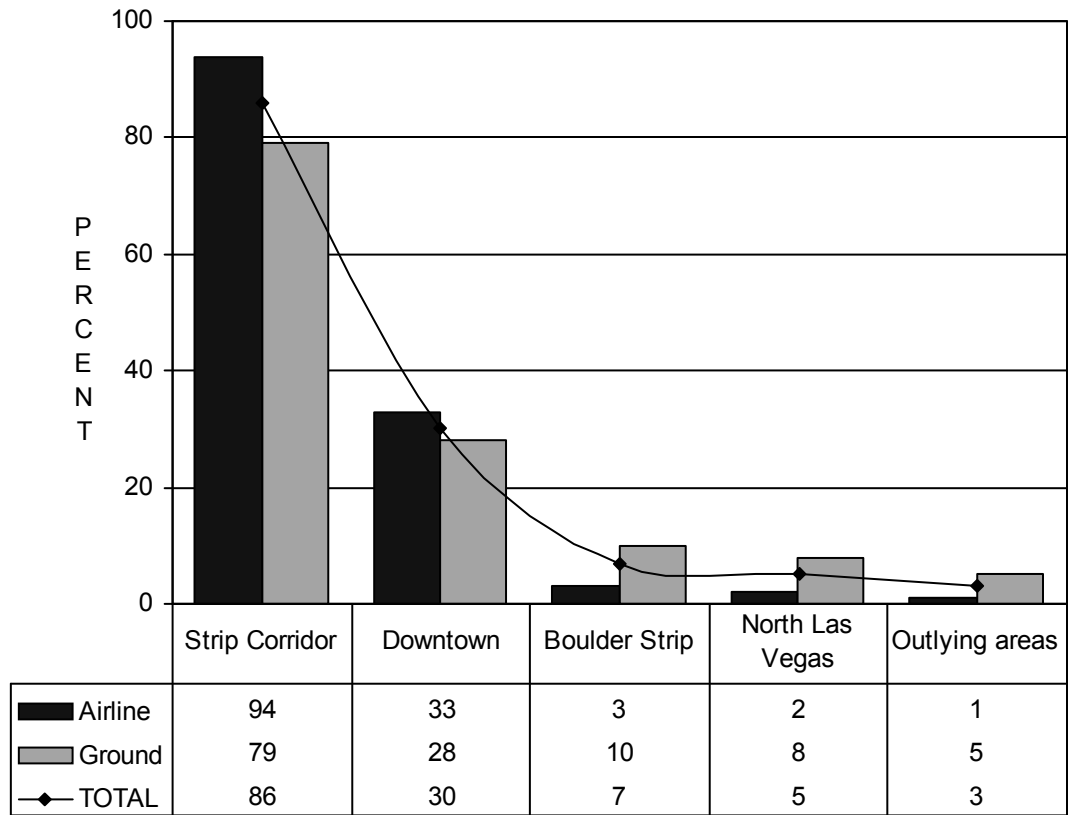
FIGURE 55  
Trip Gambling Budget  
(Among Those Who Gambled)



(Base Sizes: Airline=1343, Ground=1717, TOTAL=3060)  
(Means: Airline=\$633.66, Ground=\$453.59 TOTAL=\$531.98)

Airline visitors had significantly larger gambling budgets than those who arrived by ground transportation. Specifically, airline visitors said they had budgeted an average of \$633.66 for gambling compared to an average of \$453.59 for those who arrived by ground transportation (Figure 55).

FIGURE 56  
Where Visitors Gambled\*  
(Among Those Who Gambled)

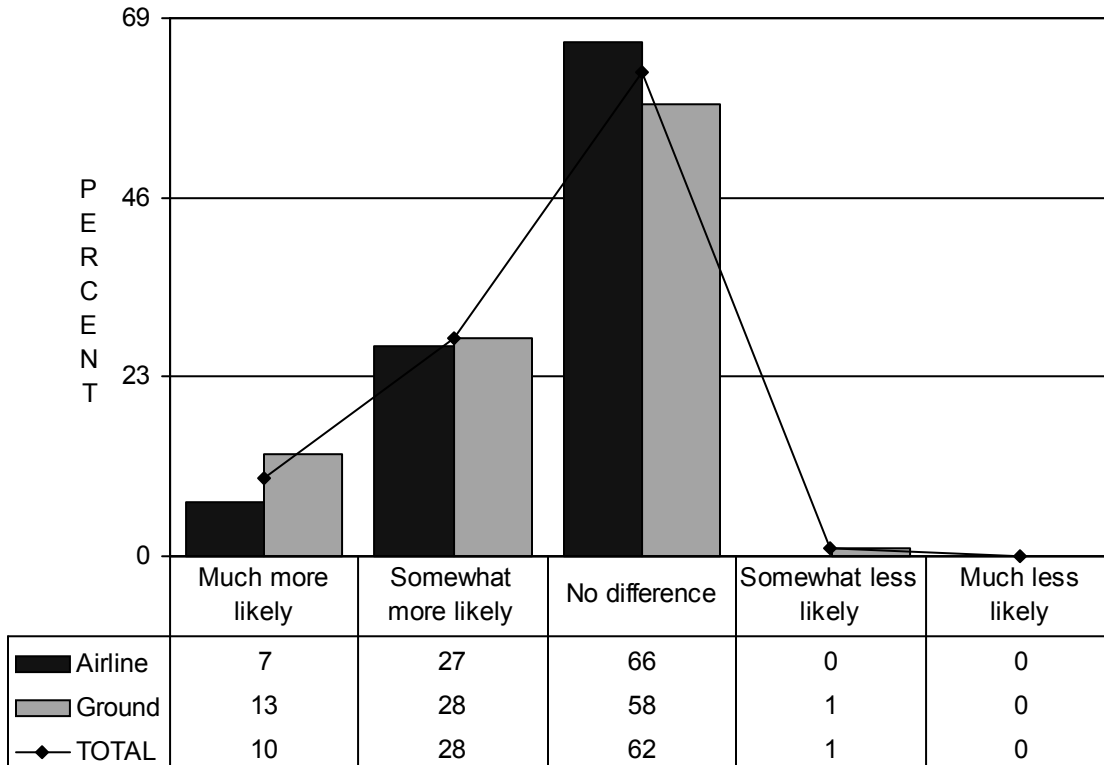


\*Multiple responses were permitted.  
(Base Sizes: Airline=1398, Ground=1624, TOTAL=3023)

As Figure 56 shows, airline visitors were significantly more likely than those who arrived by ground transportation to gamble on the Strip Corridor (94% vs. 79%) or Downtown (33% vs. 28%). Those who arrived by ground transportation were more likely than those who arrived by airline to have gambled on the Boulder Strip (10% vs. 3%), in North Las Vegas (8% vs. 2%), or in outlying areas (5% vs. 1%).

\* These results are from 2007. This question is asked every other year and was not asked in 2008.

FIGURE 57  
Likelihood Of Visiting Las Vegas With  
More Places To Gamble Outside Las Vegas



All visitors to Las Vegas were asked the following question:

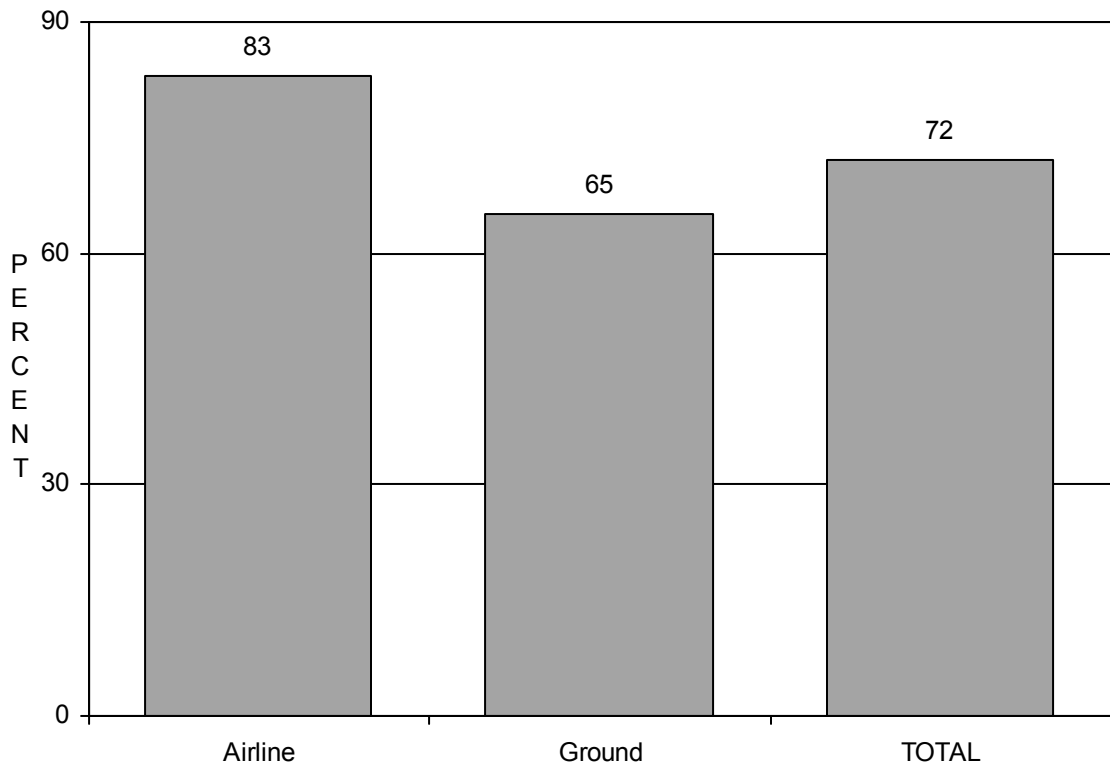
Now that there are more places to gamble outside of Las Vegas, do you feel you are more likely or less likely to visit Las Vegas, or does it make no difference in your decision to visit Las Vegas?

As Figure 57 shows, more than six in ten (62%) of all visitors said that having other places to gamble made no difference in their decision to visit Las Vegas. However, visitors who arrived by ground transportation (13%) were significantly more likely than airline visitors (7%) to say they were *much* more likely to visit Las Vegas because there were other places to gamble outside of the area, while airline visitors (66%) were more likely than those who arrived by ground transportation (58%) to say that having more places to gamble outside Las Vegas made no difference in their likelihood of visiting Las Vegas.

## ENTERTAINMENT

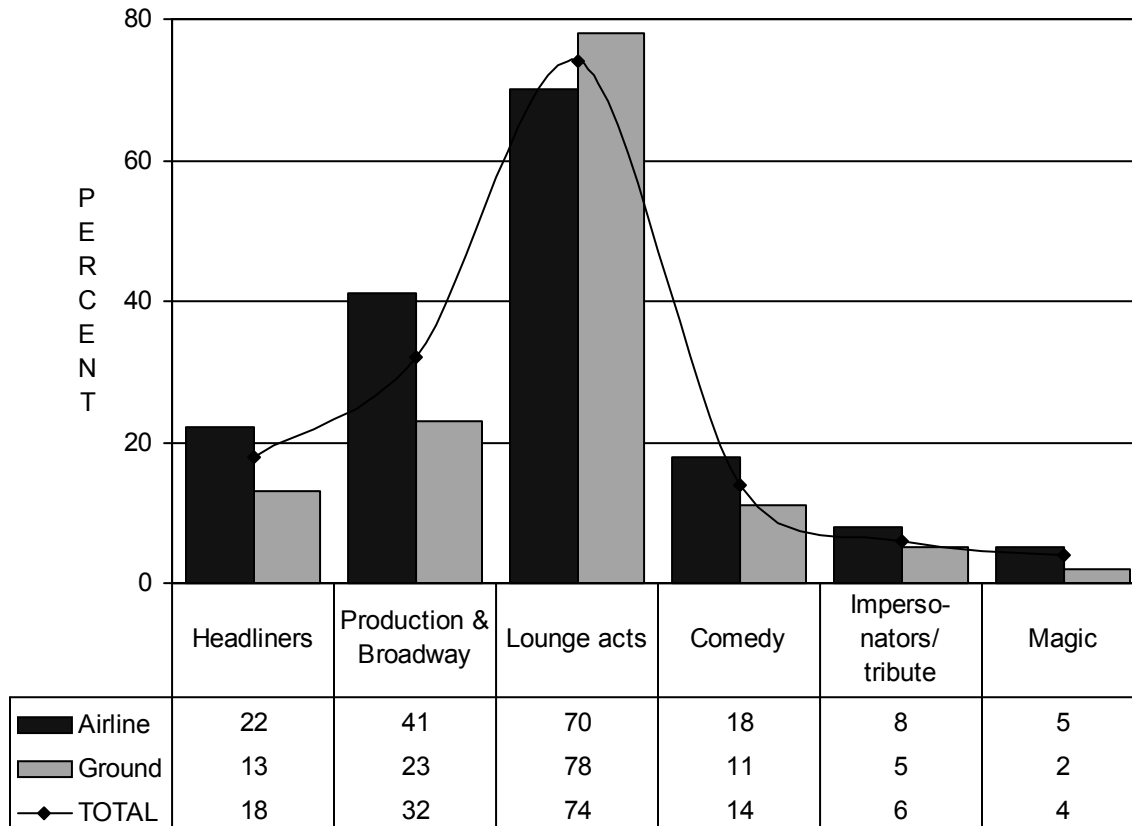
During their stay in Las Vegas, 72% of visitors saw at least one show (Figure 58). Airline visitors (83%) were significantly more likely than those who arrived by ground transportation (65%) to go to a show.

FIGURE 58  
Entertainment Attendance



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

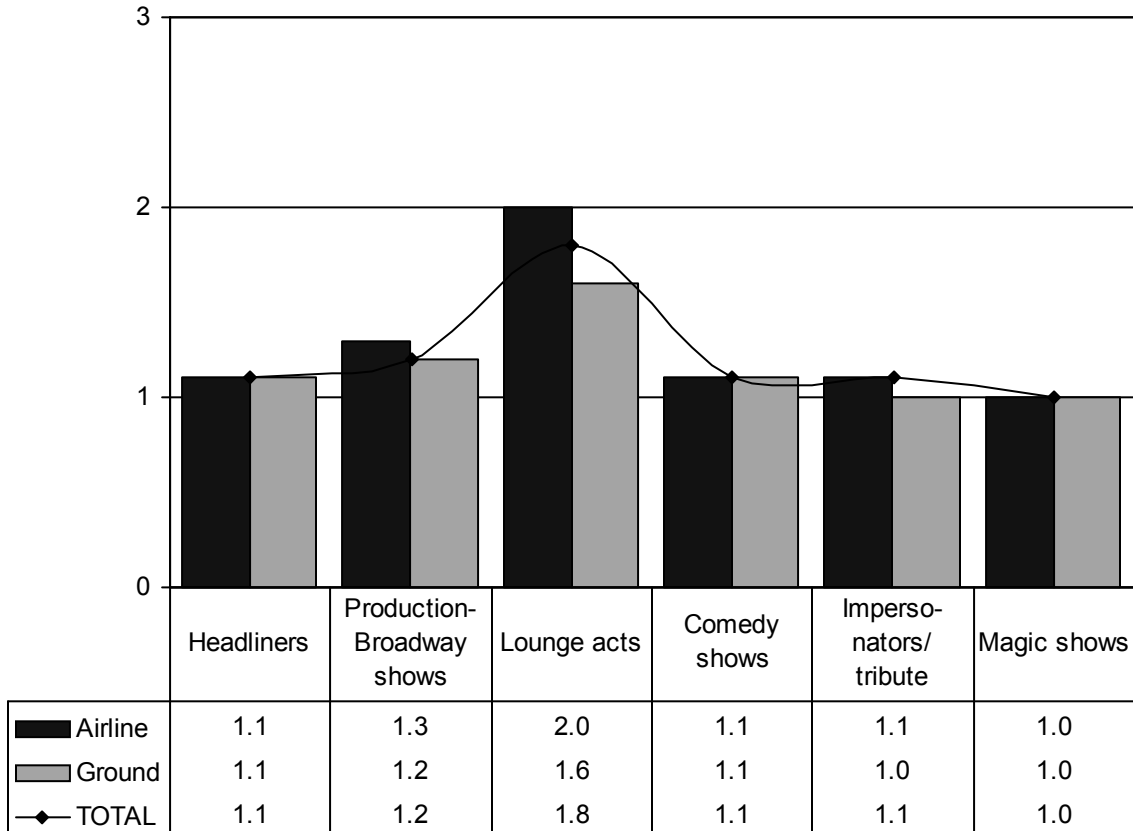
FIGURE 59  
Types Of Entertainment\*  
(Among Those Who Attended Some Form Of Entertainment)



\*Multiple responses permitted.  
(Base Sizes: Airline=1278, Ground=1331, TOTAL=2609)

Among those who attended shows, airline visitors were significantly more likely than those who arrived by ground transportation to attend Las Vegas style production shows (41% vs. 23%), shows featuring big-name entertainers (22% vs. 13%), a comedy revue (18% vs. 11%), impersonator/tribute shows (8% vs. 5%), and magic shows (5% vs. 2%) (Figure 59). Those who arrived by ground transportation were more likely than airline visitors to have attended a lounge act (78% vs. 70%).

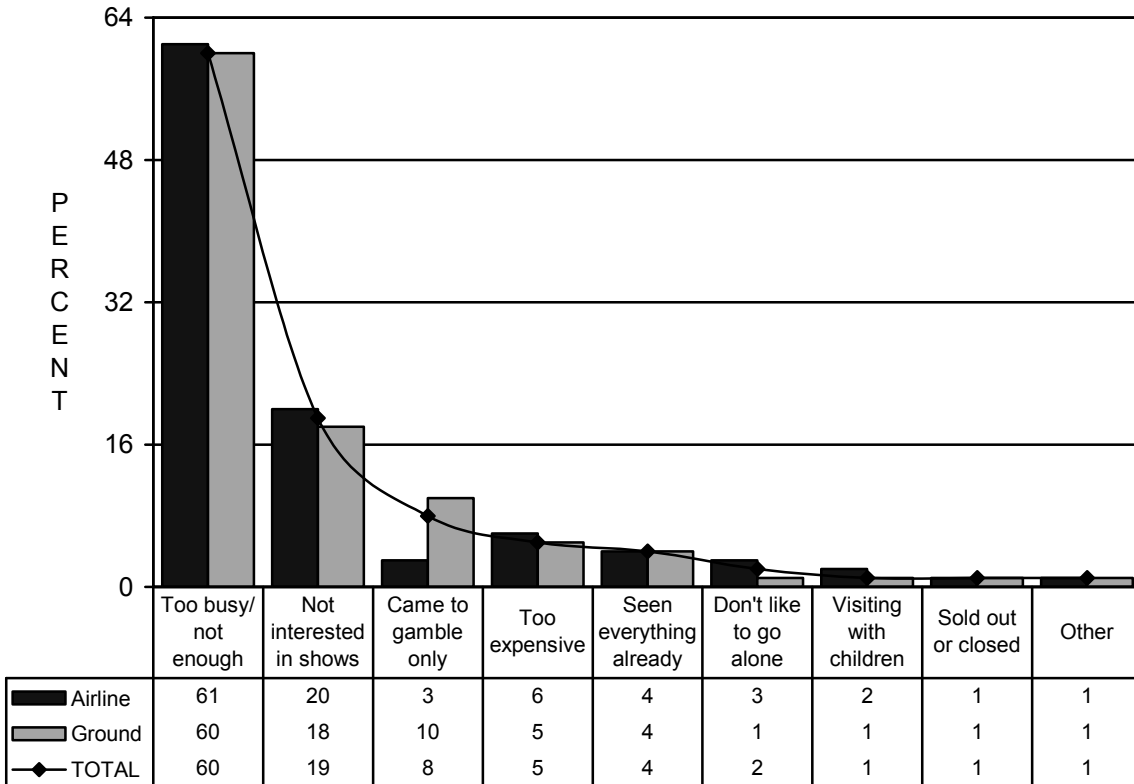
FIGURE 60  
Average Number Of Shows Attended\*  
(Among Those Who Attended Some Form Of Entertainment)



\*Multiple responses permitted.  
(Base Sizes: Airline=1278, Ground=1331, TOTAL=2609)

We looked at the average number of times visitors attended each type of show *among those who attended shows of that type* (Figure 60). Airline visitors saw significantly more lounge acts (2.0) than did those who arrived by ground transportation (1.6).

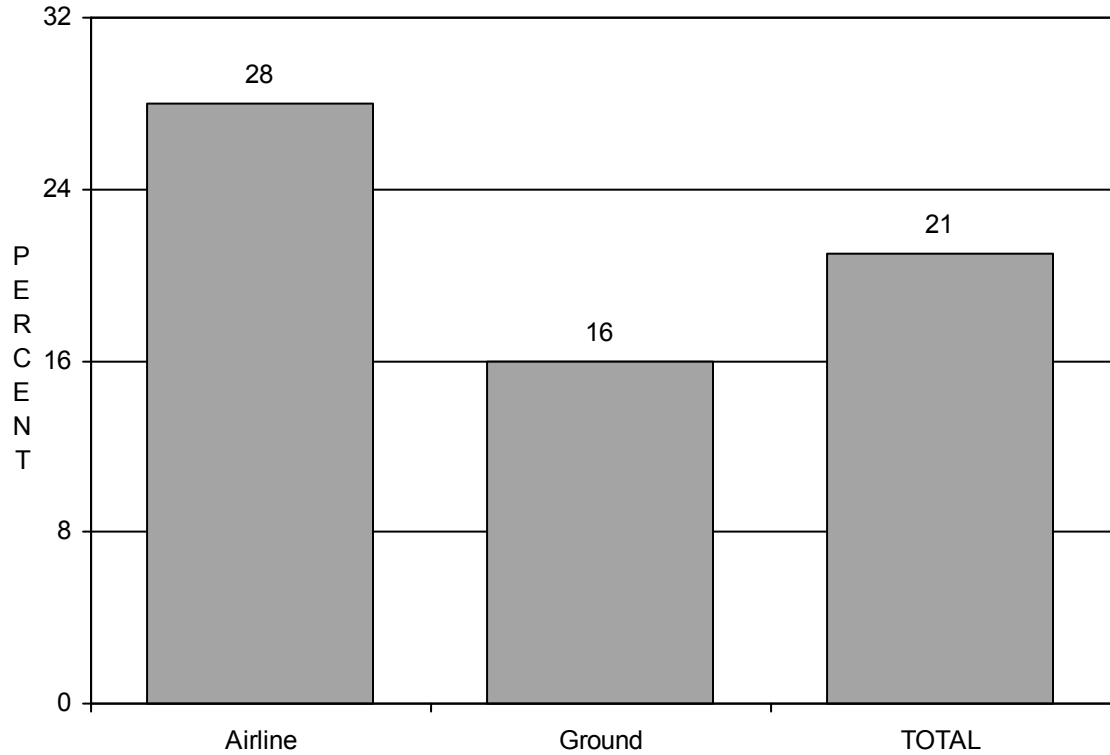
FIGURE 61  
Main Reason For Not Attending Any Shows  
(Among Those Who Attended No Shows)



(Base Sizes: Air=270, Ground=723, TOTAL=992)

Visitors who did not attend any shows while in Las Vegas were asked why (Figure 61). The majority (60%) said it was because they were too busy to see a show. Those who arrived by ground transportation were more likely than airline visitors to say they came to Las Vegas only to gamble (10% vs. 3%).

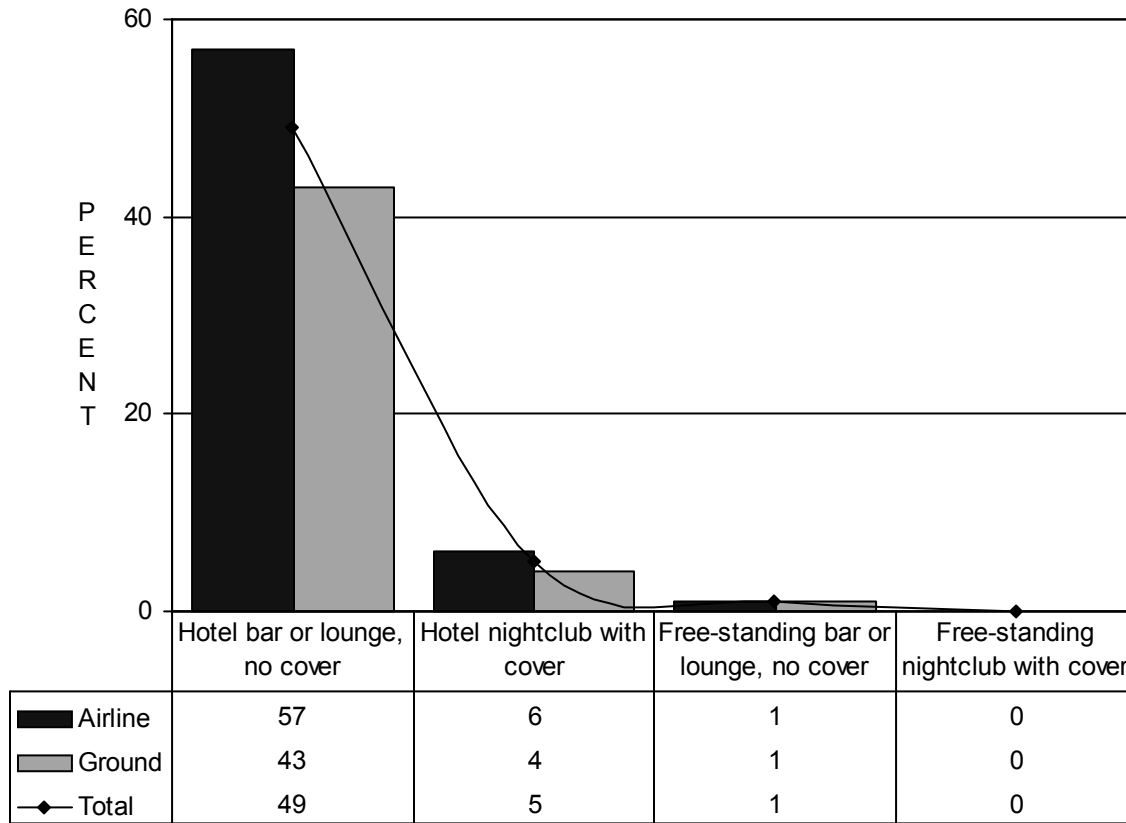
FIGURE 62  
Whether Has Been To Other Paid Attractions\*



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

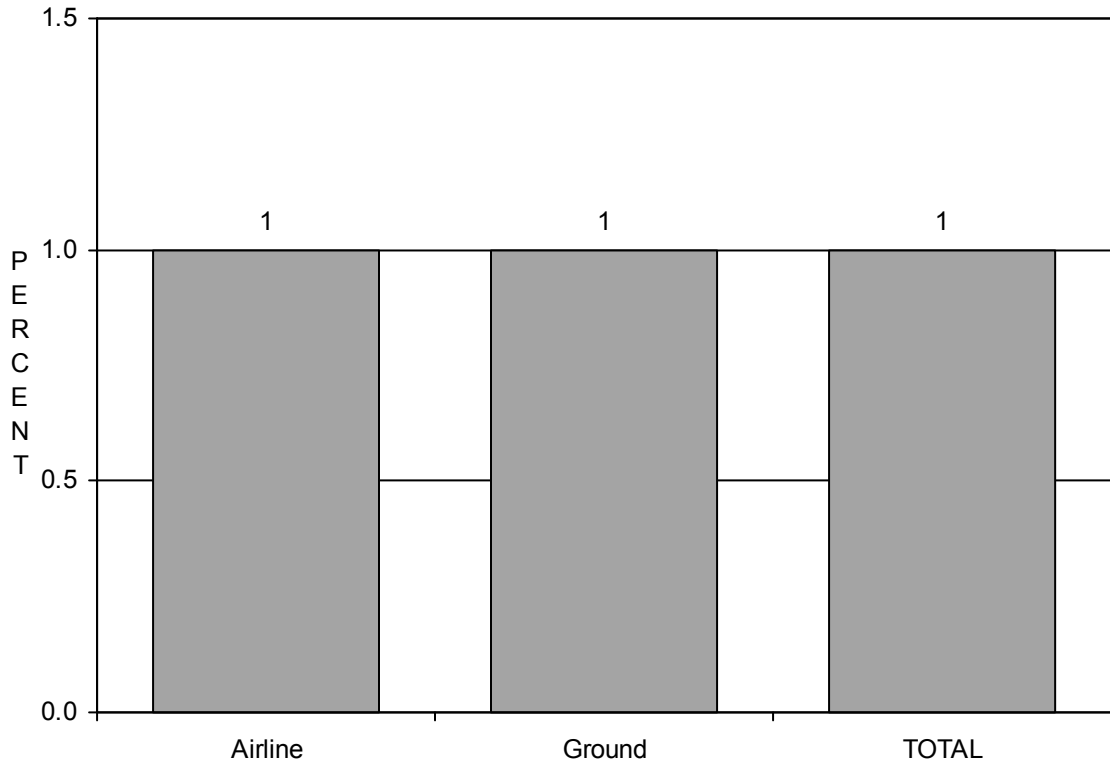
We asked visitors if during their current trip to Las Vegas they had been to other Las Vegas attractions for which they had to pay, such as theme parks, water parks, or virtual reality rides (Figure 62). Twenty-one percent (21%) of all visitors said they had, with airline visitors (28%) significantly more likely to have done so than those who arrived by ground transportation (16%).

FIGURE 63  
Whether Has Been To Nightclubs, Bars, And Lounges



We asked visitors if they visited nightclubs, bars, or lounges while in Las Vegas (Figure 63). Airline visitors (57%) were significantly more likely than those who arrived by ground transportation (43%) to say they had been to a hotel bar or lounge with no cover charge.

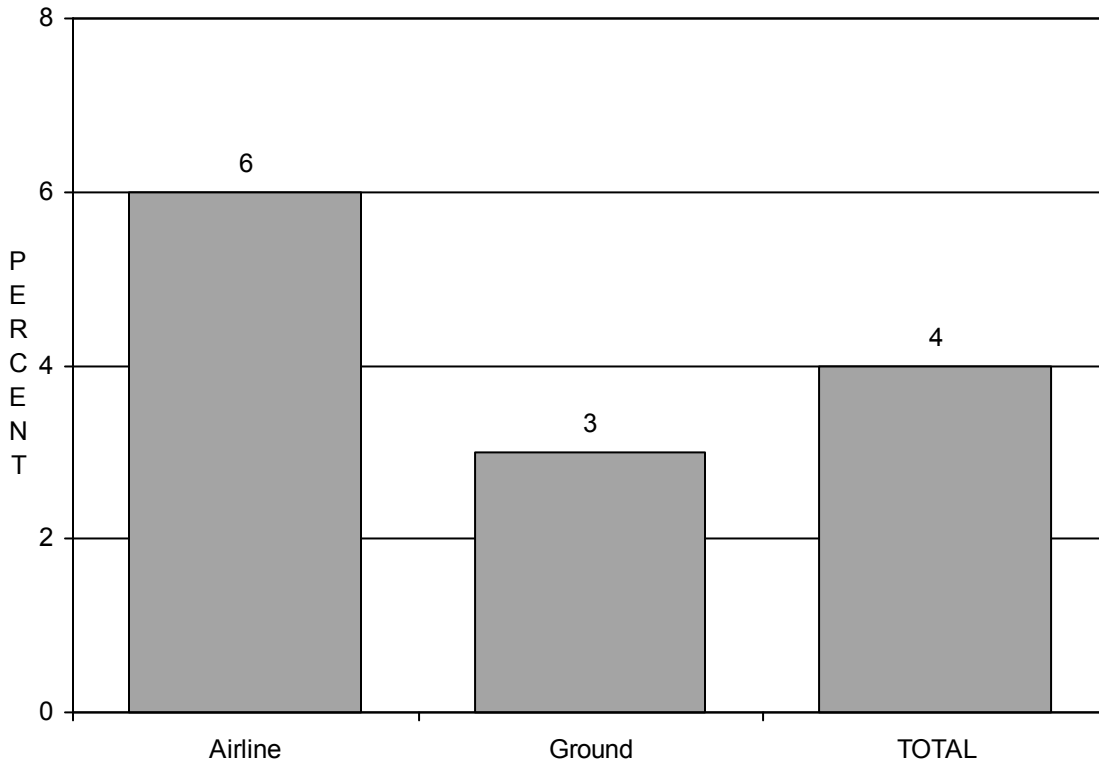
FIGURE 64  
Whether Played Golf



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

We asked visitors if they had played golf during their current visit to Las Vegas. Just 1% of all visitors said they had, with no significant difference between the subgroups (Figure 64).

FIGURE 65  
Whether Visited A Spa



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

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 65). Airline visitors (6%) were more likely than those who arrived by ground transportation (3%) to say they had visited a spa.

### ATTITUDINAL INFORMATION

Most visitors (93%) said that they were “very satisfied” with their visit to Las Vegas (Figure 66). There were no statistically significant differences between airline visitors and those who arrived by ground transportation in terms of being “very satisfied” with their visit.

FIGURE 66  
Satisfaction With Visit

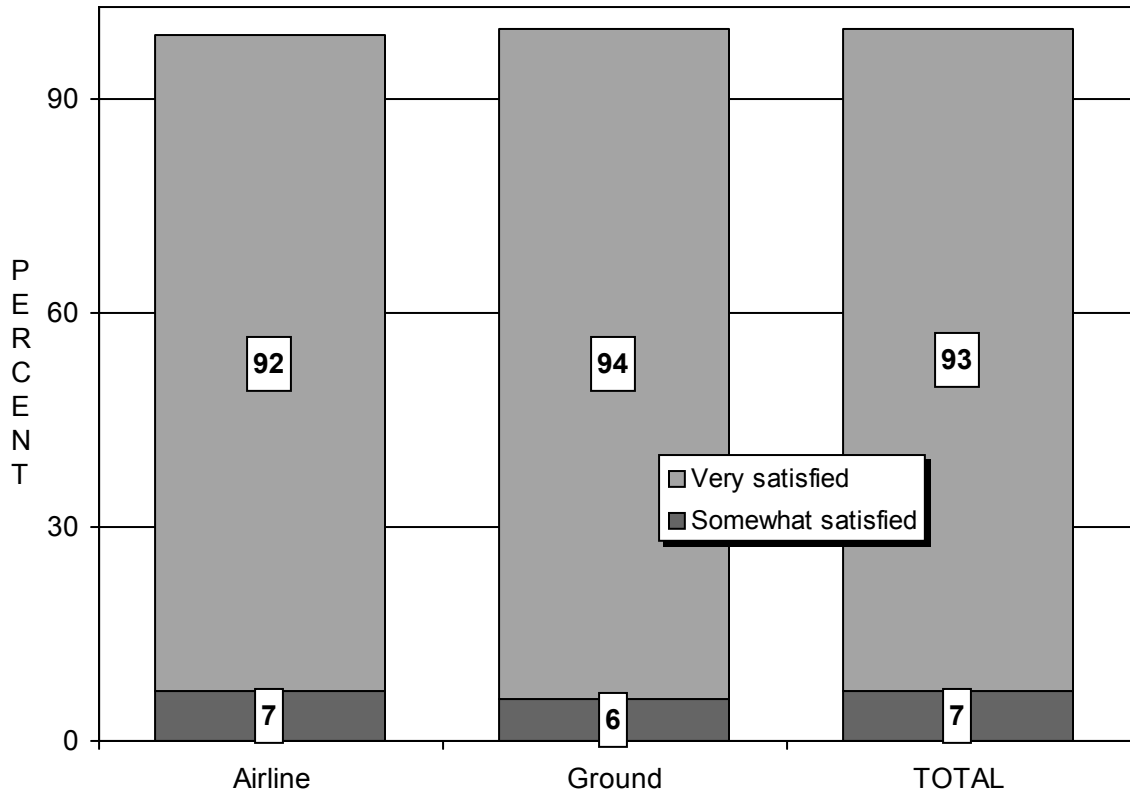
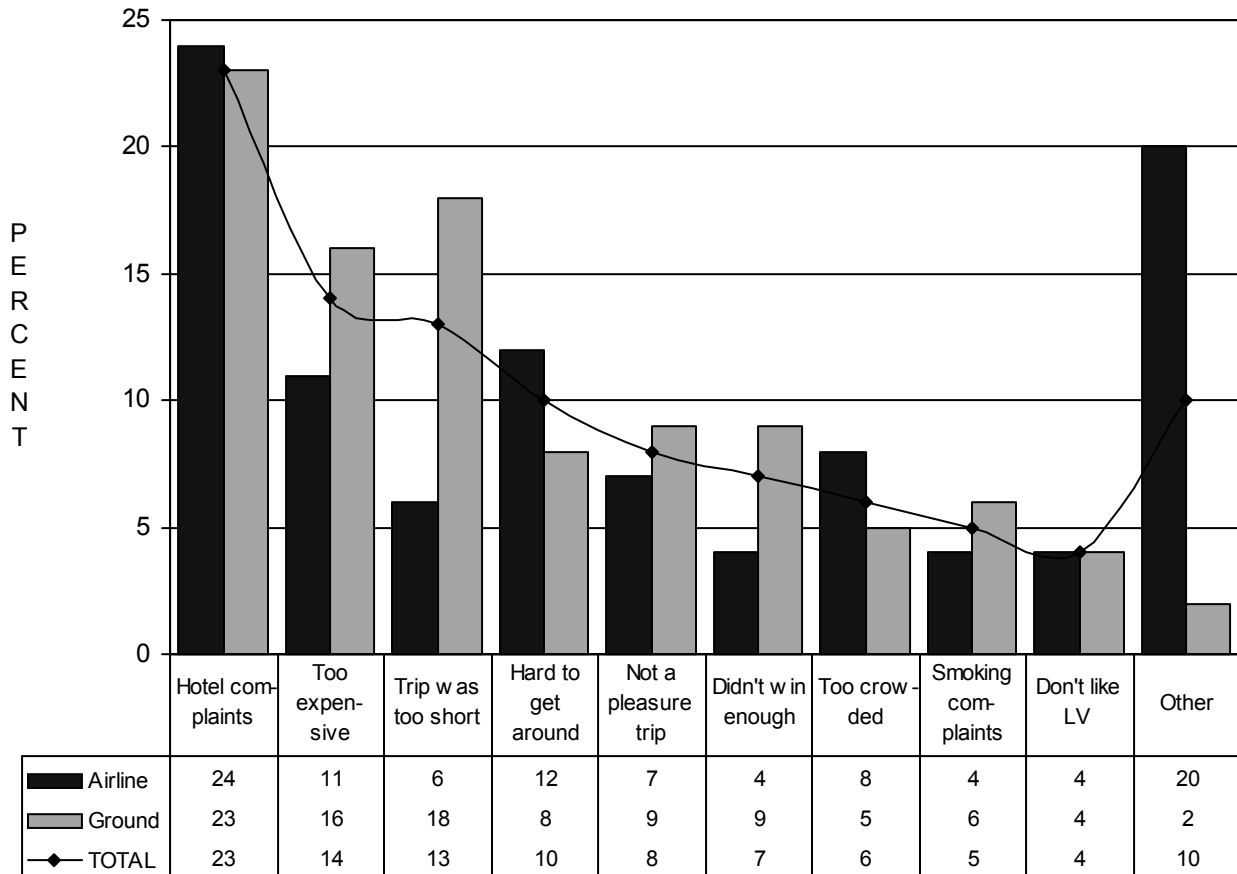


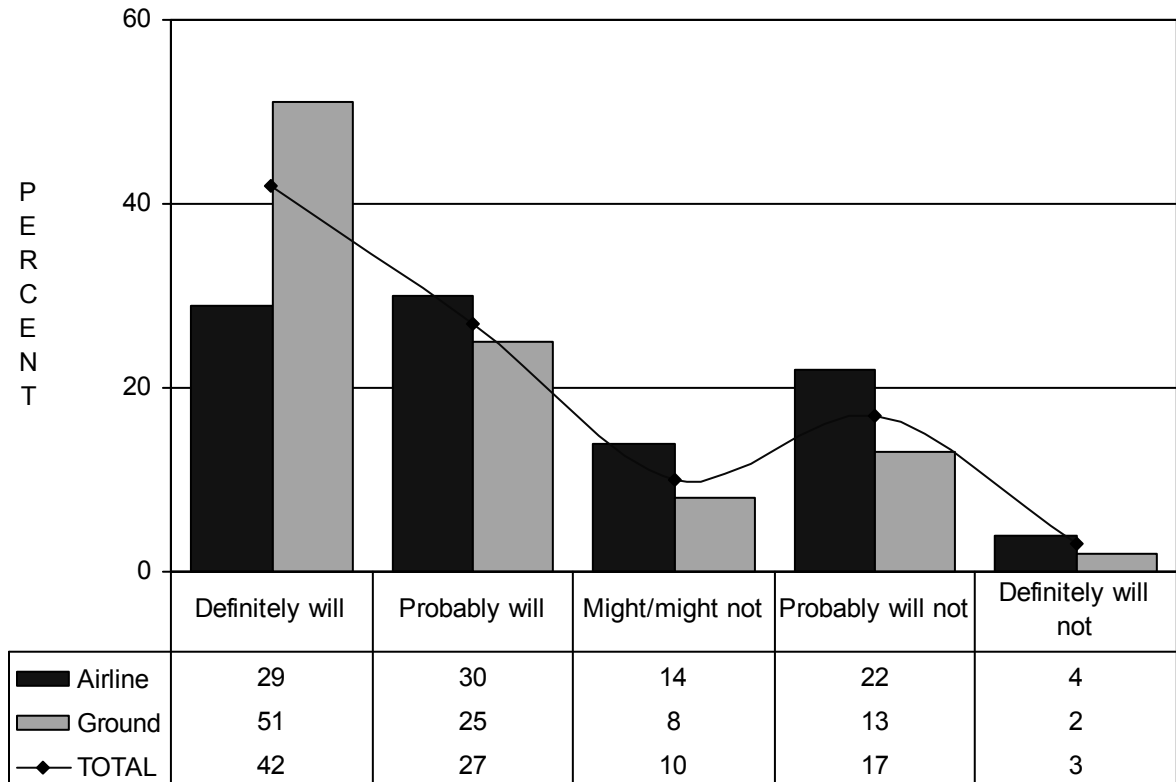
FIGURE 67  
Why Not Completely Satisfied With Visit  
(Among Those Who Were "Somewhat" Satisfied)



(Base Sizes: Internet Air=115, Non-Internet=127, TOTAL=242)

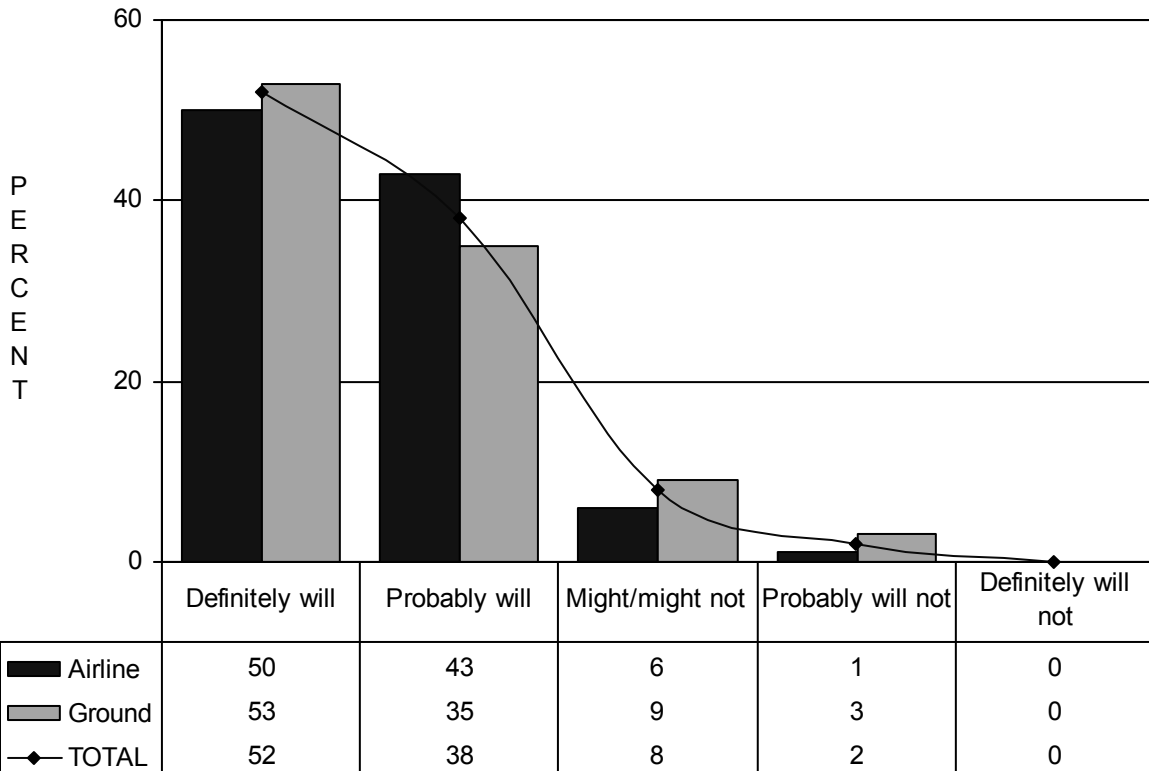
Visitors who were not completely satisfied with their visit were asked to volunteer why (Figure 67). Nearly one in four (23%) had hotel complaints, 14% said Las Vegas is too expensive, 13% said their trip was too short, and 10% complained that it was hard to get around Las Vegas. Those who arrived by ground transportation were more likely than airline visitors to say their trip was too short for them to be very satisfied (18% vs. 6%).

FIGURE 68  
Likelihood Of Returning To Las Vegas Next Year



Visitors were asked how likely they are to return to Las Vegas the following year (Figure 68), and 69% of all visitors said they “definitely” or “probably” will. Those who arrived by ground transportation (76%) were significantly more likely than airline visitors (59%) to say they “definitely” or “probably” will return.

FIGURE 69  
Likelihood Of Recommending Las Vegas To Others



Visitors were also asked how likely they are to recommend Las Vegas to others (Figure 69), and most (90%) said they “definitely” or “probably” will recommend Las Vegas. Airline visitors (43%) were more likely than those who arrived by ground transportation (35%) to say they “probably” will recommend Las Vegas.

## VISITOR DEMOGRAPHICS

Airline visitors were significantly more likely than those who arrived by ground transportation to be (Figure 70 and Figure 71):

- Employed (69% vs. 63%).
- College graduates (49% vs. 42%).
- From 40 to 59 years old (47% vs. 39%).
- Earning \$80,000 or more (47% vs. 36%).
- White (92% vs. 88%).
- From U.S. regions other than the West (58% vs. 13%).
- Foreign visitors (23% vs. 10%).

Those who came to Las Vegas by means other than air were significantly more likely than airline visitors to be:

- Retired (30% vs. 26%).
- Either younger (11% were 21 to 29 years old vs. 8% of airline visitors), or older (24% were 65 or older vs. 19% of airline visitors).
- Earning less than \$80,000 (53% vs. 40%).
- Hispanic/Latino (6% vs. 2%).
- From the Western region of the United States (76% vs. 19%), particularly California (45% vs. 6%) and Arizona (14% vs. 2%).

**FIGURE 70**  
**VISITOR DEMOGRAPHICS**

	Airline	Ground	TOTAL
<u>GENDER</u>			
Male	50%	51%	51%
Female	50	49	49
<u>MARITAL STATUS</u>			
Married	81	79	80
Single	12	14	13
Separated/Divorced	5	5	5
Widowed	3	2	2
<u>JOB CATEGORIES</u>			
Employed	69	63	66
Unemployed	1	1	1
Student	1	3	2
Retired	26	30	28
Homemaker	4	3	4
<u>EDUCATION</u>			
High school or less	27	28	28
Some college	20	22	21
College graduate	49	42	45
Trade/vocational school	5	8	7
<u>AGE</u>			
21 to 29	8	11	10
30 to 39	15	15	15
40 to 49	23	19	21
50 to 59	24	20	22
60 to 64	12	10	11
65 or older	19	24	22
MEAN	50.5	50.6	50.6
BASE	(1548)	(2054)	(3601)

**FIGURE 71**  
**VISITOR DEMOGRAPHICS**

	Airline	Ground	TOTAL
<u>ETHNICITY</u>			
White	92%	88%	90%
African American/Black	4	4	4
Asian/Asian American	2	2	2
Hispanic/Latino	2	6	4
Other	0	0	0
<u>HOUSEHOLD INCOME</u>			
Less than \$20,000	0	2	1
\$20,000 to \$39,999	4	5	5
\$40,000 to \$59,999	15	20	18
\$60,000 to \$79,999	21	26	24
\$80,000 to \$99,999	19	20	19
\$100,000 or more	28	17	22
Not sure/no answer	12	11	12
<u>VISITOR ORIGIN</u>			
<u>U.S.A.</u>	<u>77</u>	<u>90</u>	<u>85</u>
Eastern states*	15	3	8
Southern states†	21	6	13
Midwestern states‡	22	4	12
<u>Western states§</u>	<u>19</u>	<u>76</u>	<u>52</u>
California	<u>6</u>	<u>45</u>	<u>28</u>
Southern California	3	39	24
Northern California	3	6	4
Arizona	2	14	9
Other West	12	17	15
<u>Foreign</u>	<u>23</u>	<u>10</u>	<u>15</u>
BASE	(1548)	(2054)	(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.