



2021 Mid-Year Las Vegas Visitor Snapshot

August 13, 2021



Las Vegas Convention and Visitors Authority

VisitLasVegas.com | LVCVA.com | VegasMeansBusiness.com

Executive Summary

Derived from in-person intercept surveys conducted along the tourism corridor in the months of March thru June 2021, contained herein is a condensed mid-year "snapshot" of Las Vegas visitor behaviors and characteristics during the first half of 2021. Due to health and logistical concerns surrounding the pandemic, compounded by budgetary impacts, the LVCVA's visitor surveys were suspended for most of 2020 and the initial months of 2021. However, with socially distanced, fully masked surveyors in face shields, we were able to successfully resume surveys with Las Vegas visitors who generously took time out of their visits to offer vital feedback we rely on to support our tourism-dependent economy.

Key Highlights

- Despite limited or altered visitor experiences for much of the first half of the year (such as plexiglass dividers at gaming tables, the absence of most shows and events, etc.), nearly 7 out of 10 (68%) of respondents were very satisfied with their trip and another 28% were somewhat satisfied. For comparison, 94% of visitors in 2019 were very satisfied pre-pandemic and another 5% somewhat satisfied with their trip. However, when asked to compare their trip experience with their expectations before arriving, more than half (53%) noted the trip slightly or significantly exceeded their expectations and 41% noted their trip met their expectations, with only 6% indicating their experience fell short of their expectations.
- Approximately four out of ten (41%) volunteered that their trip to Las Vegas was their first overnight trip taken since the pandemic began.
- To understand pandemic "bleisure" travelers who blend business and leisure activities by working remotely and/or while traveling, we probed to understand how many visitors conducted some work during their stay; a little more than one in five (22%) noted they worked at some point during their Las Vegas visit.
- One in four visitors (24%) were first time visitors to Las Vegas in the first half of 2021, similar to 2019 but up from levels of 18% to 21% in recent years.
- Las Vegas, like most destinations, saw a larger share of its visitors arrive by car with fewer arriving by air. Drive visitors represented approximately 57% of visitors with the other 43% comprised of air visitors. Pre-pandemic, the air/ground mix of travelers was closer to 50/50 (51% drive/ground, 49% air in 2019).
- Potentially attributed to younger travelers and more traveling with family, Las Vegas visitors tended to travel in larger groups than prior to the pandemic as the average number of people per room rose to 2.6, up from the historically consistent average of 2.0 people per room. Along a similar trend, drive visitors tended to travel with more people per vehicle (2.9) than in recent years when such tallies hovered between 2.2 and 2.5.
- Possibly reflective of virtual and remote schooling during the pandemic, the percentage of Las Vegas visitors traveling with someone under the age of 21 spiked significantly to 27%, up from levels traditionally hovering under 10%.



Executive Summary

(CONTINUED)



Key Highlights

- Potentially due to the limited availability of certain shows and experiences during the pandemic, visitors tended to explore more during their stay as reflected in a larger percentage of visitors (55%) visiting Downtown during their stay, up from 42-46% in recent years.
- The percentage who gambled during their stay was 73%, down from 81% in 2019 but on par with prior years. However, gaming budgets were strong among those who gambled during their stay, reaching \$653 per trip, up from \$591 in 2019.
- Overall spending among visitors was fairly strong despite limited availability of certain shows and experiences due to COVID restrictions; as a result, visitors tended to spend more on gaming, shopping and sightseeing.
- With the pandemic affecting older citizens most significantly, the destination saw a significantly younger mix of visitors as the average visitor age fell to 42, a full 4 years younger than pre-pandemic averages. Approximately half of Las Vegas visitors (49%) were under 40 years old (vs. 37% pre-pandemic) and only 15% were over age 60 (vs. 24% pre-pandemic).
- Increased proportions of younger visitors rippled thru many of the other visitor demographics, translating to...
 - more visitors with household incomes under \$60k (37% vs. 29% pre-pandemic)
 - more unmarried visitors (45% vs. 27% pre-pandemic)
 - fewer visitors with a college degree than recent years (38% vs. 51% pre-pandemic)
 - more ethnically diverse visitors (20% African American vs. 9% pre-pandemic; 16% Hispanic/Latino vs. 11% pre-pandemic; and 6% Asian vs. 3% pre-pandemic)
- With the combined phenomena of minimal international travel due to COVID restrictions and increased travel by car during the pandemic, Las Vegas saw notable increases in visitation from states in the Western U.S. as 63% of visitors were from Western states, up from 47% pre-pandemic.

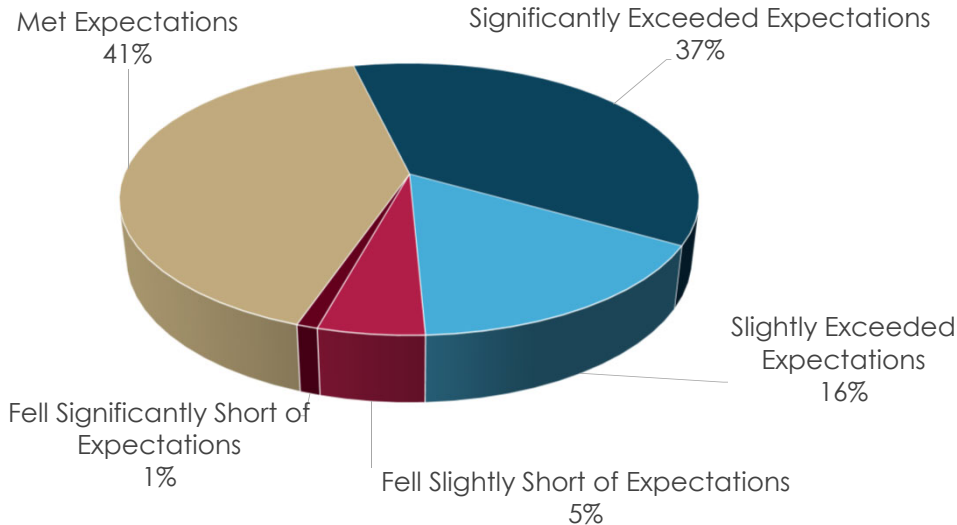


Visitor Experience vs. Expectations

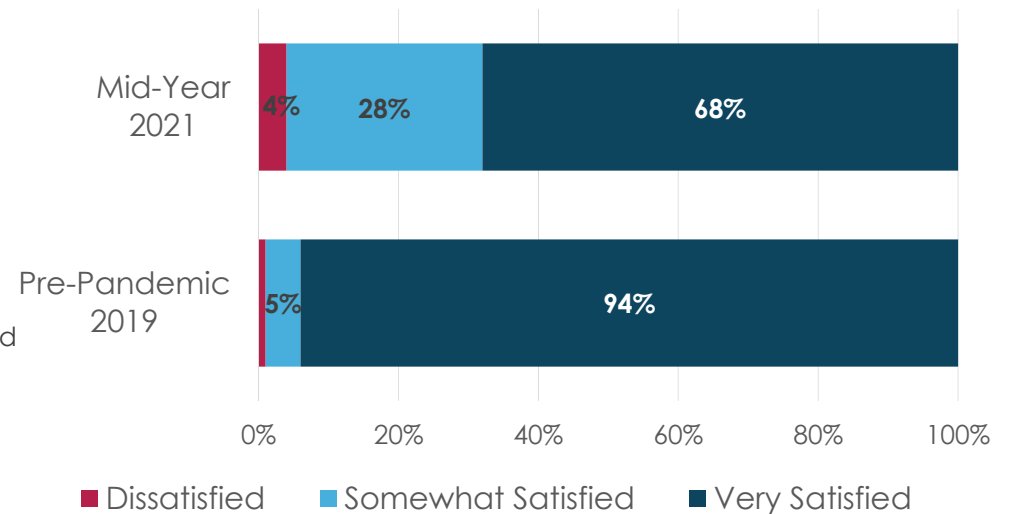
Despite limited or altered visitor experiences for much of the first half of the year (such as plexiglass dividers at gaming tables, the absence of most shows and events, etc.), nearly 7 out of 10 (68%) of respondents were very satisfied with their trip and another 28% were somewhat satisfied. For comparison, 94% of visitors in 2019 were very satisfied pre-pandemic and another 5% somewhat satisfied with their trip.

However, when asked to compare their trip experience with their expectations before arriving, more than half (53%) noted the trip slightly or significantly exceeded their expectations and 41% noted their trip met their expectations, with only 6% indicating their experience fell short of their expectations.

**Which phrase best describes your Las Vegas experience on this trip compared to your expectations before arriving?
Would you say Las Vegas...**



**Overall, how satisfied were you with your visit to Las Vegas?
Were you...**



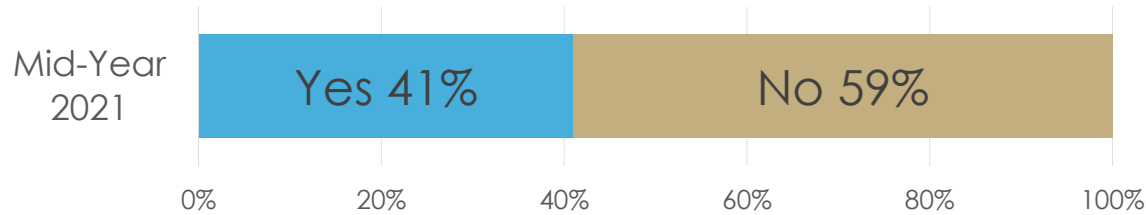
Source: Las Vegas Convention and Visitors Authority; distributed by the LVCVA Research Center

Emerging Travel Behaviors



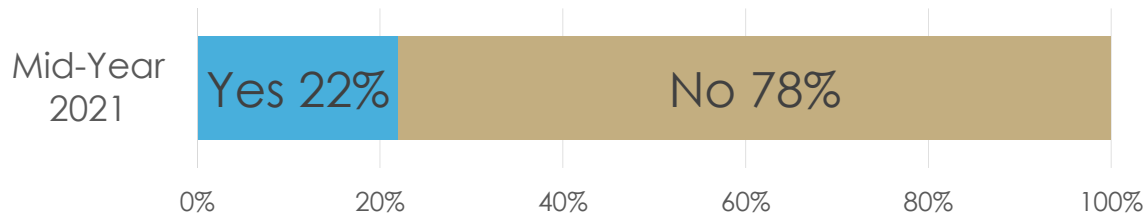
Approximately four out of ten (41%) volunteered that their trip to Las Vegas was their first overnight trip taken since the pandemic began.

Was this your first overnight trip since the pandemic quarantine began?



To understand pandemic “bleisure” travelers who blend business and leisure activities by working remotely and/or while traveling, we probed to understand how many visitors conducted some work during their stay; a little more than one in five (22%) noted they worked at some point during their Las Vegas visit.

Did you conduct any work, online or otherwise, for your employer during your stay in Las Vegas?

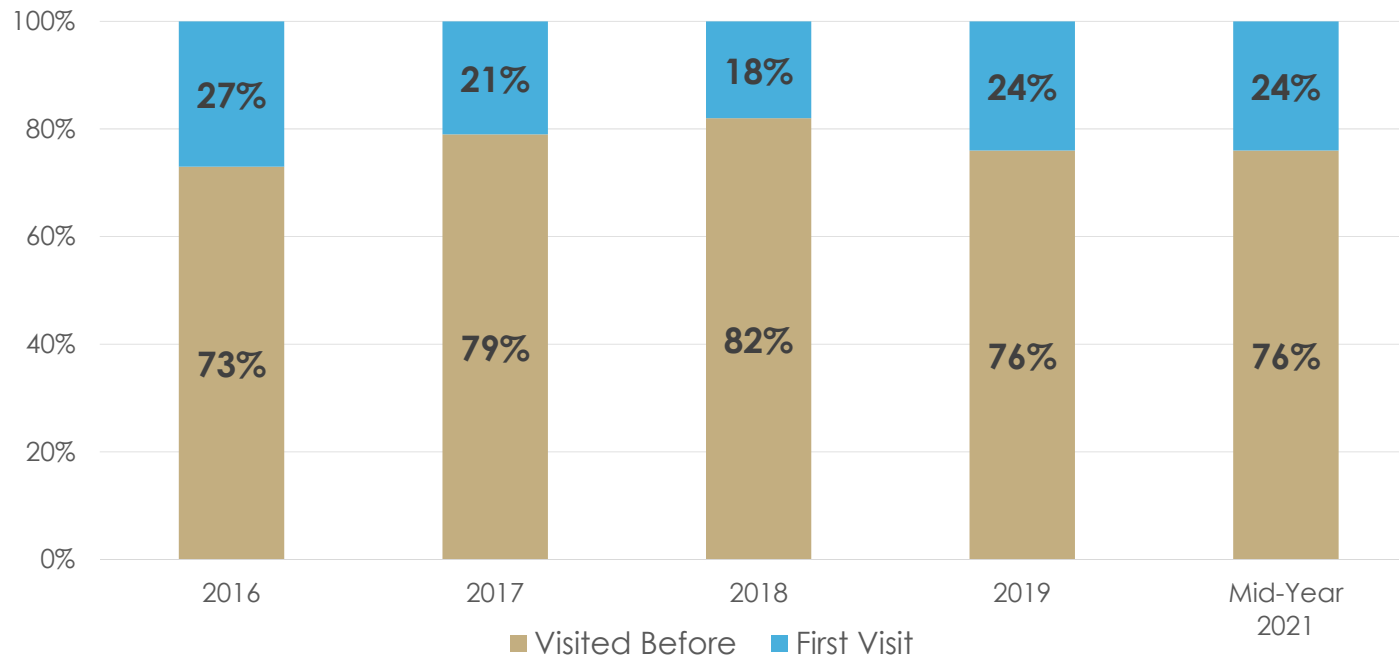


Source: Las Vegas Convention and Visitors Authority; distributed by the LVCVA Research Center

First Time vs. Repeat Visitors



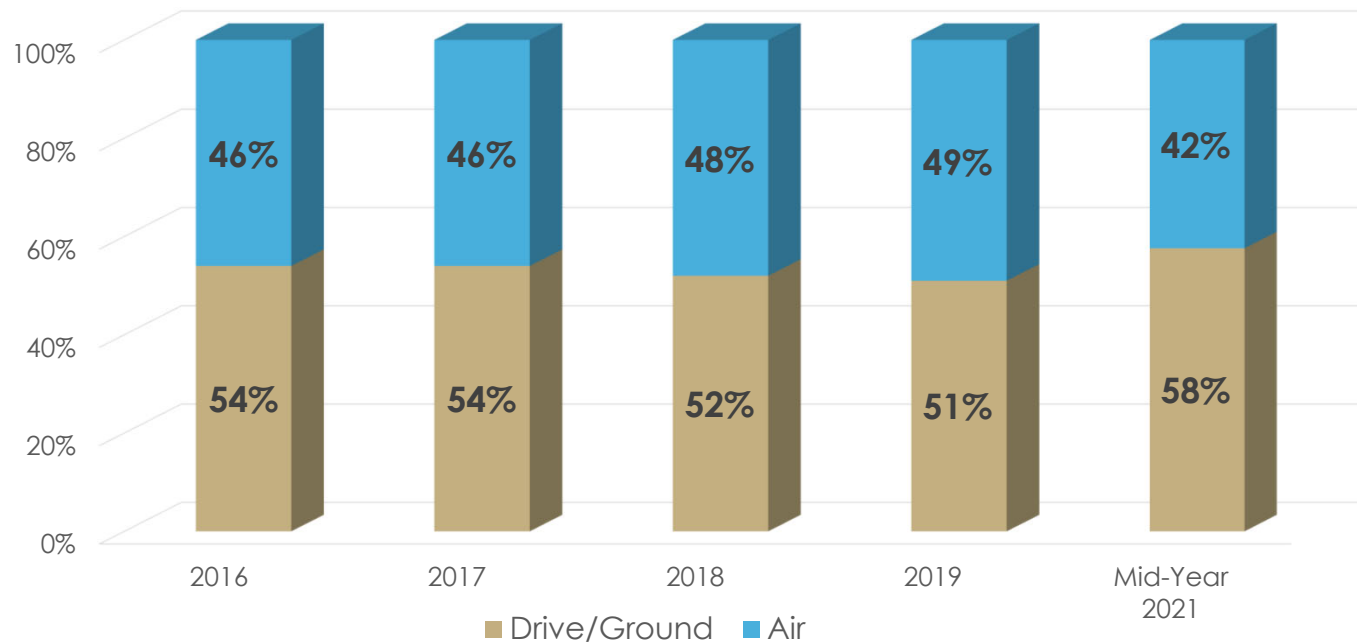
One in four visitors (24%) were first time visitors to Las Vegas in the first half of 2021, similar to 2019 but up from levels of 18% to 21% in recent years.



Mode of Arrival



Las Vegas, like most destinations, saw a larger share of its visitors arrive by car with fewer arriving by air. Drive visitors represented approximately 58% of visitors with the other 42% comprised of air visitors. Pre-pandemic, the air/ground mix of travelers was closer to 50/50 (51% drive/ground, 49% air in 2019).

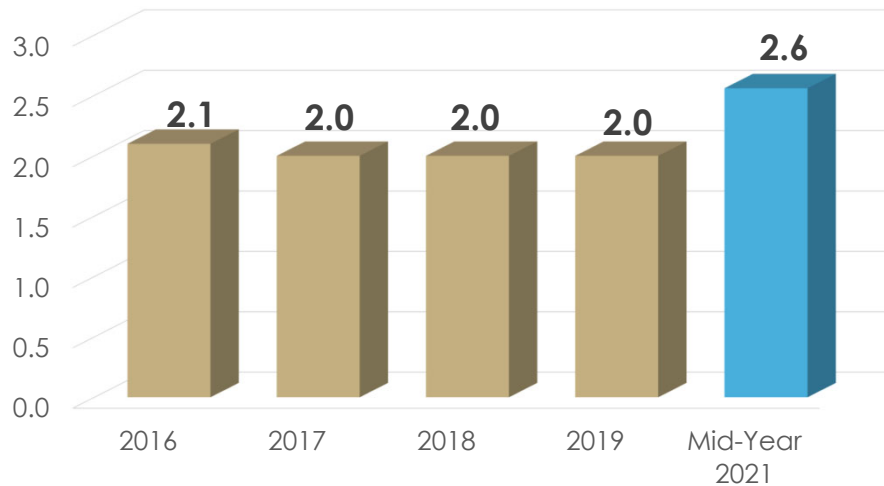


Travel Party Size

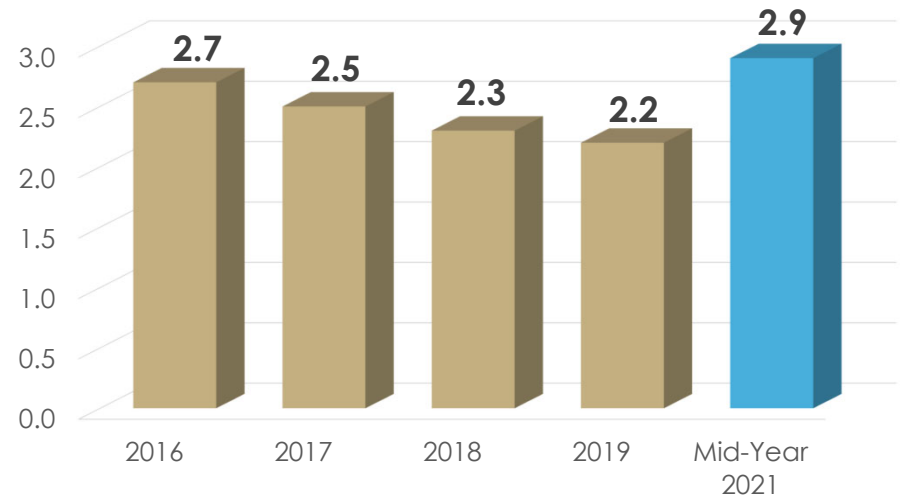


Potentially attributed to younger travelers and more traveling with family, Las Vegas visitors tended to travel in larger groups than prior to the pandemic as the average number of people per room rose to 2.6, up from the historically consistent average of 2.0 people per room. Along a similar trend, drive visitors tended to travel with more people per vehicle (2.9) than in recent years where such tallies hovered between 2.2 and 2.5.

Avg. People per Room



**Avg. People per Vehicle
(among those who drove to Las Vegas)**



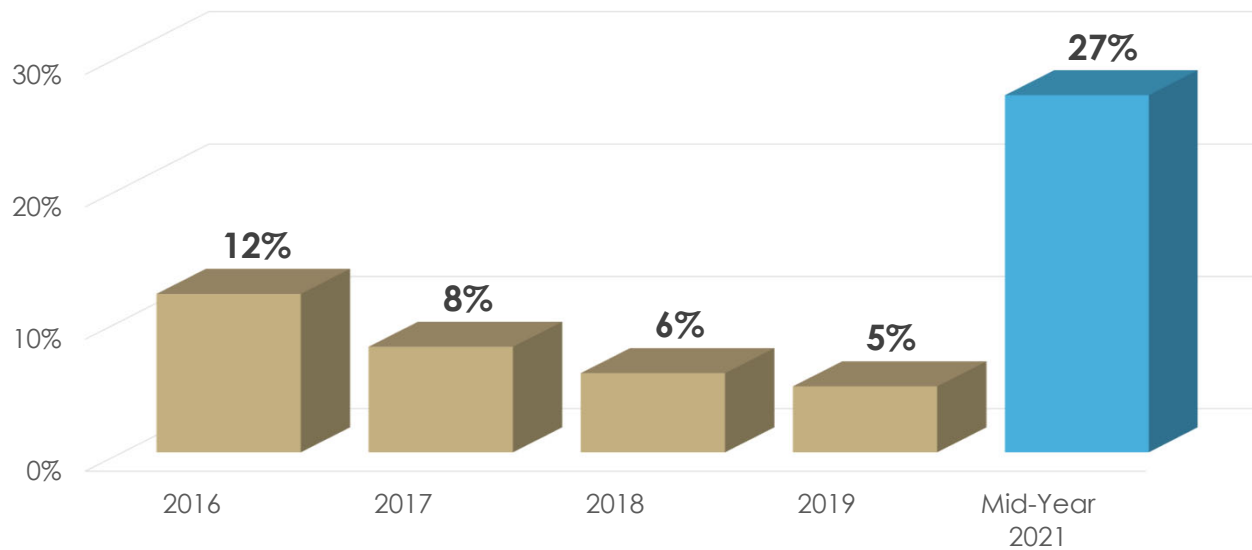
Source: Las Vegas Convention and Visitors Authority; distributed by the LVCVA Research Center

Traveling with Kids



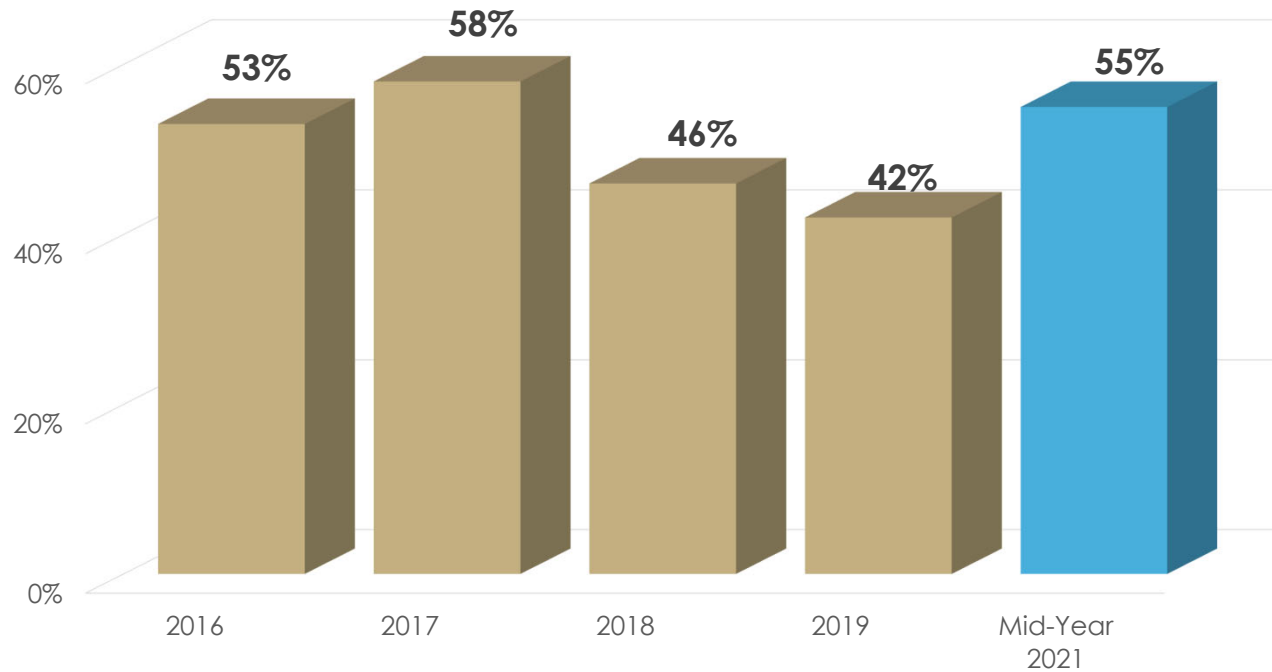
Possibly reflective of virtual and remote schooling during the pandemic, the percentage of Las Vegas visitors traveling with someone under the age of 21 spiked significantly to 27%, up from levels traditionally hovering under 10%.

Traveled w/someone under 21



Visited Downtown

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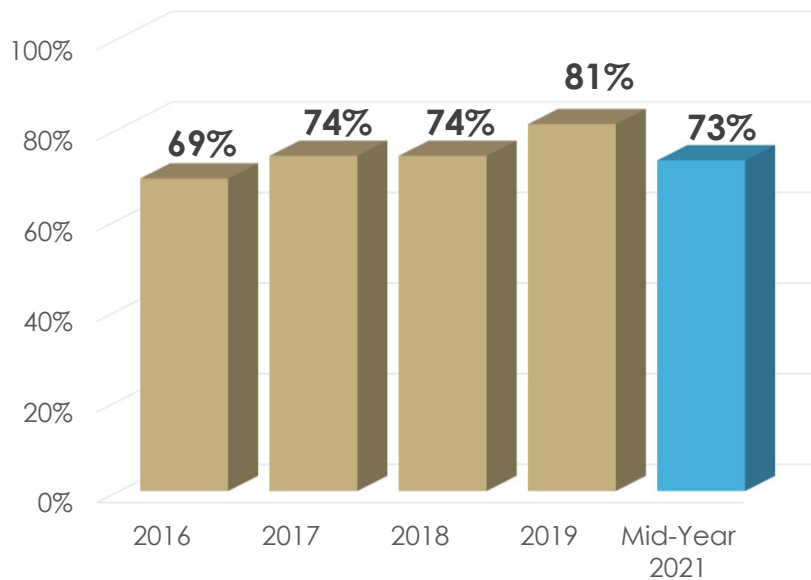


Gaming Behavior

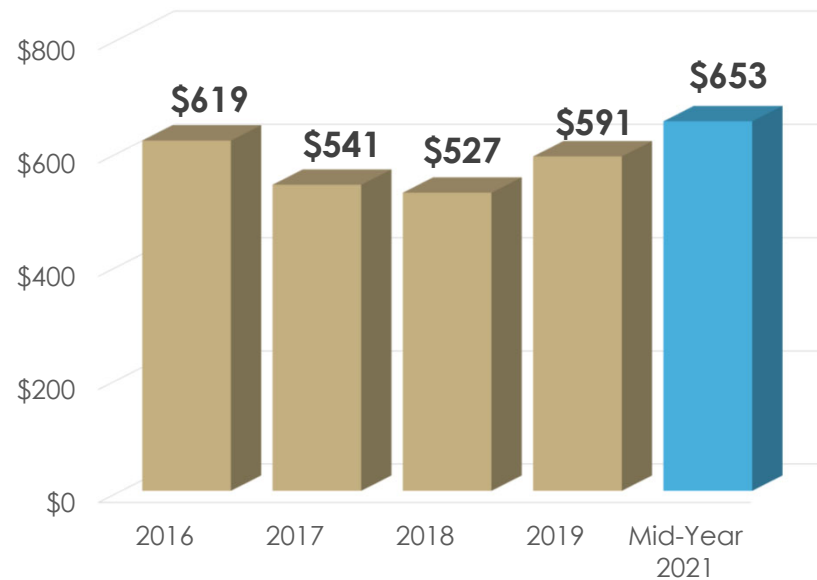
The percentage who gambled during their stay was 73%, down from 81% in 2019 but on par with prior years. However, gaming budgets were strong among those who gambled during their stay, reaching \$653 per trip, up from \$591 in 2019.



Gambled during visit



Avg. trip gaming budget
(among those who gambled)

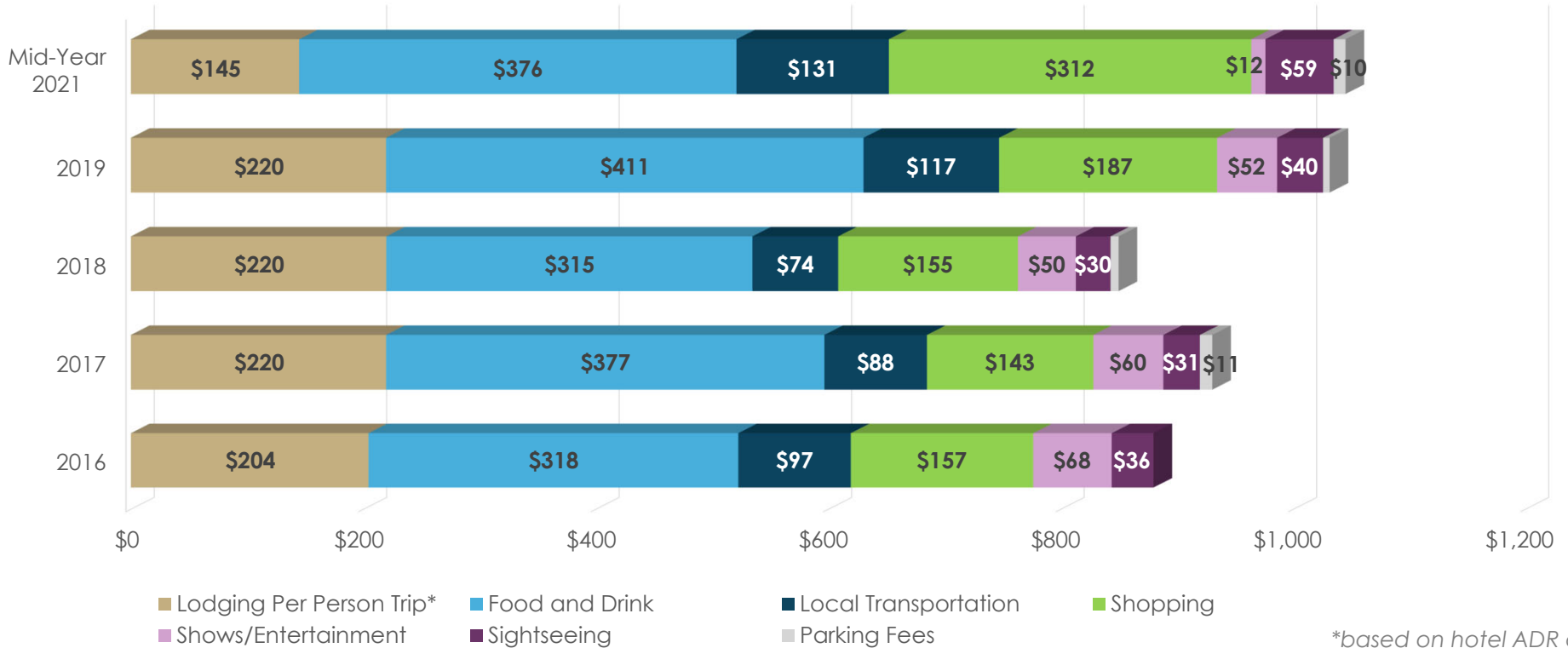


Visitor Spending



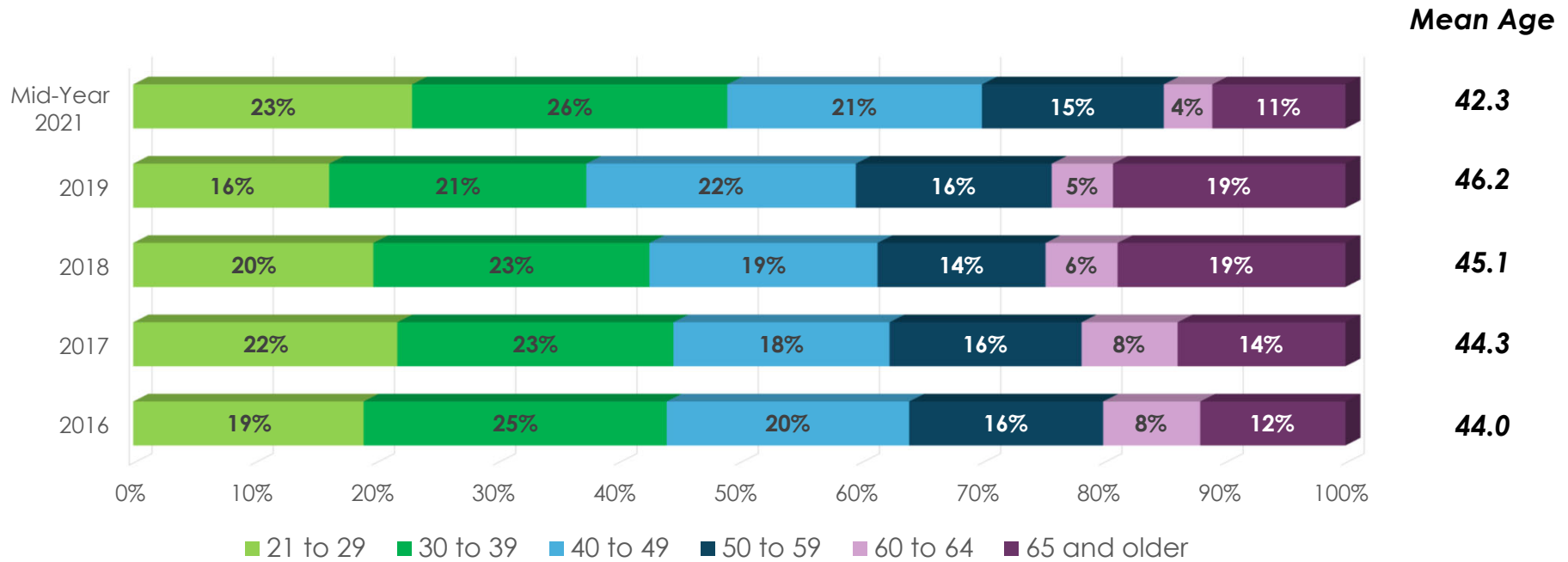
Overall spending among visitors was fairly strong despite limited availability of certain shows and experiences due to COVID restrictions; as a result, visitors tended to spend more on gaming, shopping and sightseeing.

Trip Expenditures Per Visitor (including those who spent \$0)



Demographics

With the pandemic affecting older citizens most significantly, the destination saw a significantly younger mix of visitors as the average visitor age fell to 42, a full 4 years younger than pre-pandemic averages. Approximately half of Las Vegas visitors (49%) were under 40 years old (vs. 37% pre-pandemic) and only 15% were over age 60 (vs. 24% pre-pandemic).



Demographics (CONTINUED)



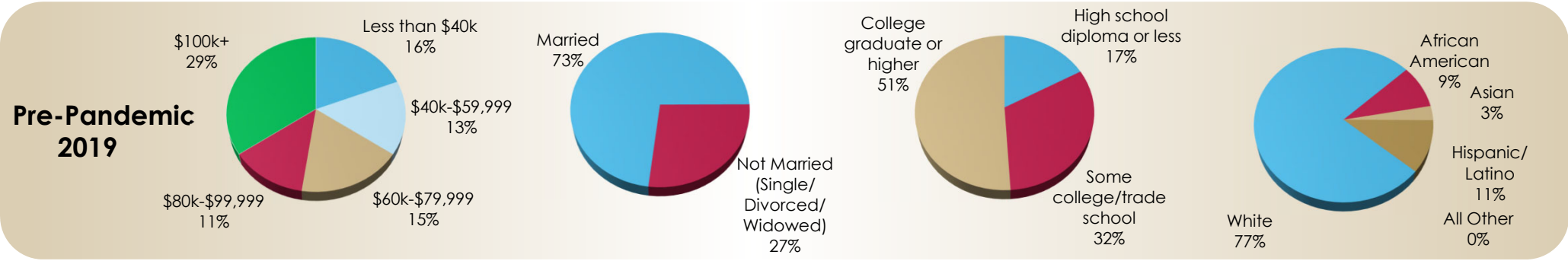
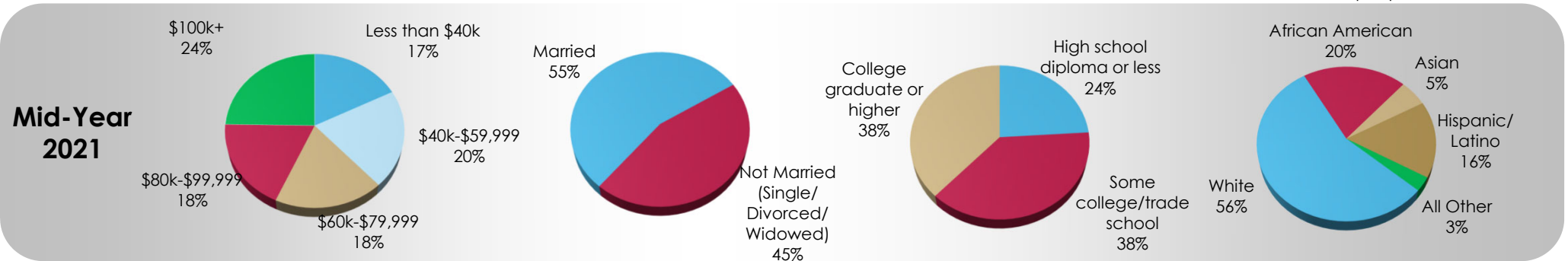
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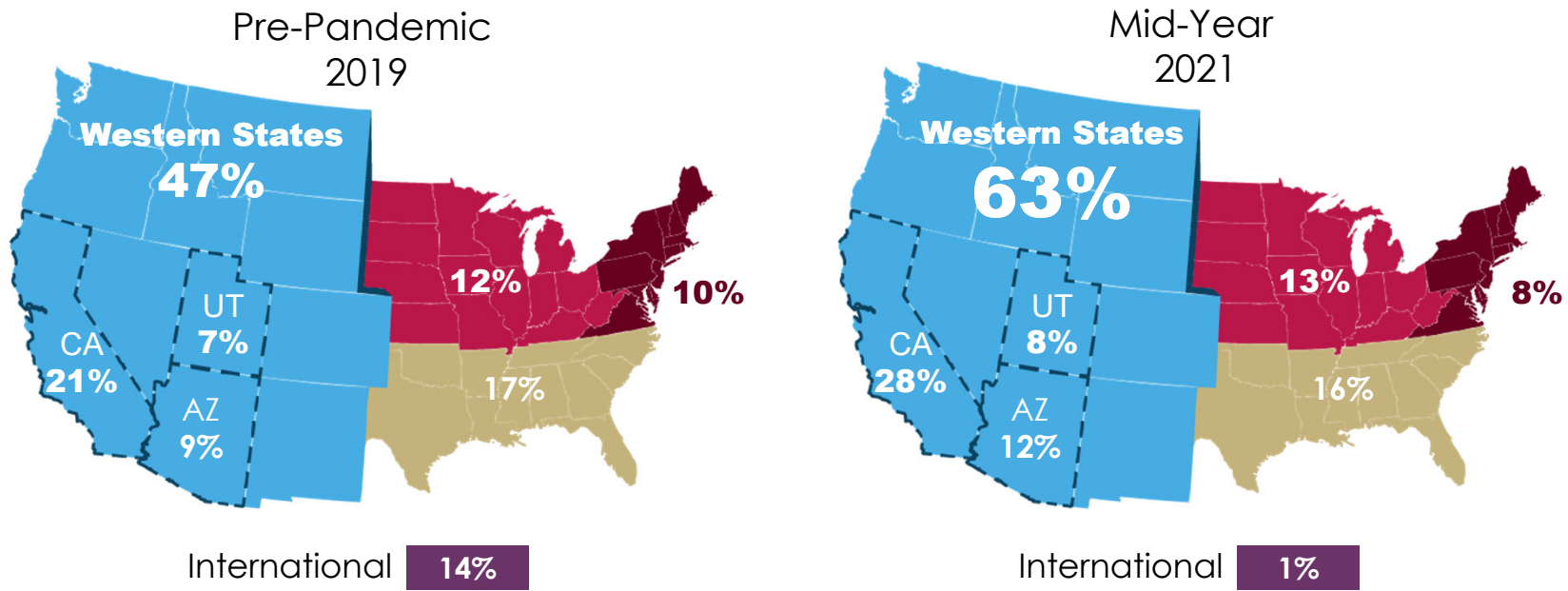


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Visitor Origin



With the combined phenomena of minimal international travel due to COVID restrictions and increased travel by car during the pandemic, Las Vegas saw notable increases in visitation from states in the Western U.S. as 63% of visitors were from Western states, up from 47% pre-pandemic.



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Methodology

In-person interviews were conducted with 1,600 randomly selected visitors. Approximately four hundred (400) interviews were conducted each month in March thru June 2021. 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 from prior years have been weighted to more accurately reflect actual visitors to Las Vegas in terms of mode of transportation, lodging location and month of visit. Specifically, the mode of transportation weight is derived from a compilation of data provided by the LVCVA, McCarran International Airport and the Nevada Department of Transportation. The lodging location weight is derived from geographic area specific occupancy rates from independent surveys conducted by the LVCVA. The month of visit weight is derived from monthly room nights occupied data, also from independent surveys conducted by the LVCVA as part of their ongoing room occupancy audit.

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

Acknowledgements

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



Thank you.