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The Innovation and Brand Research Specialists

State of the Casino Visitor in America

October 2009

Nobody's Unpredictable

Methodology

- This study was conducted on the Internet using Ipsos' "Voice of America" Panel.
- Data was collected between September 17th and 28th, 2009 with a total sample size of n=1521. The data was weighted to 2006 US Census data based on age (US population aged 20+) and regional distribution (Midwest, Northeast, South, and West) across the country.
- The margin of error for a sample size of n=1521 is +/-2.51, 19 times out of 20.
- For more information about this study, please contact:

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Key Findings

Casino Visits and Spending

- Only half of Casino visitors reported that they own a player loyalty card to a Casino.
- Among respondents surveyed, approximately one third (33%) had been to a Casino at least once in the past year, while slightly less had visited in the past month (27%). A handful of respondents reported visiting a Casino in the past week (12%).
  - Adults with a household income above $75K were more likely to visit a Casino than those earning less.
- The number of visits to “in-state” Casinos was significantly greater than visits to “out-of state” Casinos (besides Casinos in Las Vegas and Atlantic City) as well as destination Casinos like Las Vegas and Atlantic City.
- Casino visitors reported spending slightly more on non-gambling related activities than on gambling
  - The mean reported spend on all “non-gambling” related activities was for their last visit to a Casino was $326.60, compared to $321.60 on all “gambling” related activities.

Key Findings cont...

Visitors Spending Less or No Longer Visiting

- Less than half of casino visitors (42%) reported that they were spending "less" money at Casinos compared to one year ago. Alternatively, a small number of respondents (8%) indicated that they were spending "more" money and half (50%) were spending the same amount of money at Casinos compared to one year ago.
  - Top reasons respondents provided (on an open-ended basis) for spending "less" money at Casinos compared to one year ago were:
    - "Do not go as often/gambling less/don't go anymore" (40% mentioned);
    - "Financial situation/less disposable income" (29% mentioned); and
    - "Due to the economy" (14% mentioned)
- Agreement with reasons for not visiting a Casino (in the past 3 years) included the following:
  - "I prefer to spend my money on other forms of entertainment" (80% agreed);
  - "I don't like to risk losing money" (74% agreed); and
  - "I don't think of going to the Casino" (72% agreed)

Key Findings cont...

Casino Visit Behavior

- Few Casino visitors agreed that they typically visit a Casino alone (18%)
  - Most Casino visitors (76%) cited that they typically visit the Casino with a friend or a spouse, while approximately one third (32%) agreed they typically visit with a group of friends, and another 11% visit with a co-worker or co-workers.
- Among Casino visitors incentive ideas that received the most positive feedback include:
  - A free night in the Casino hotel for you and a guest (43% definitely/probably would go should this be offered)
  - Free tickets to a show, concert, or other live performance at the Casino for you and a guest (41% definitely/probably would go should this be offered)
- Approximately one quarter of respondents (who had been to a Casino at least once in the past three years), said that they would be likely to play Casino style gaming on the Internet for real money should their favorite Casino offer the service.

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Results

State of the Casino Visitor in America Study

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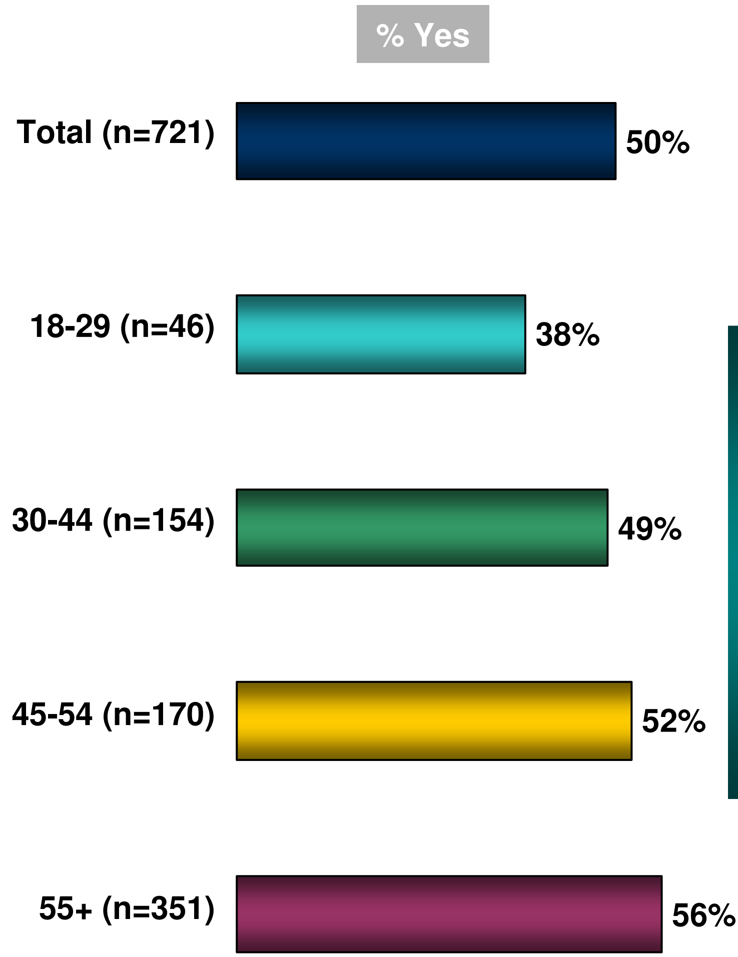
Currently Own a Play Loyalty Card to a Casino



Significant Finding!

Much of the subsequent findings differentiate between loyalty card owners and non-owners

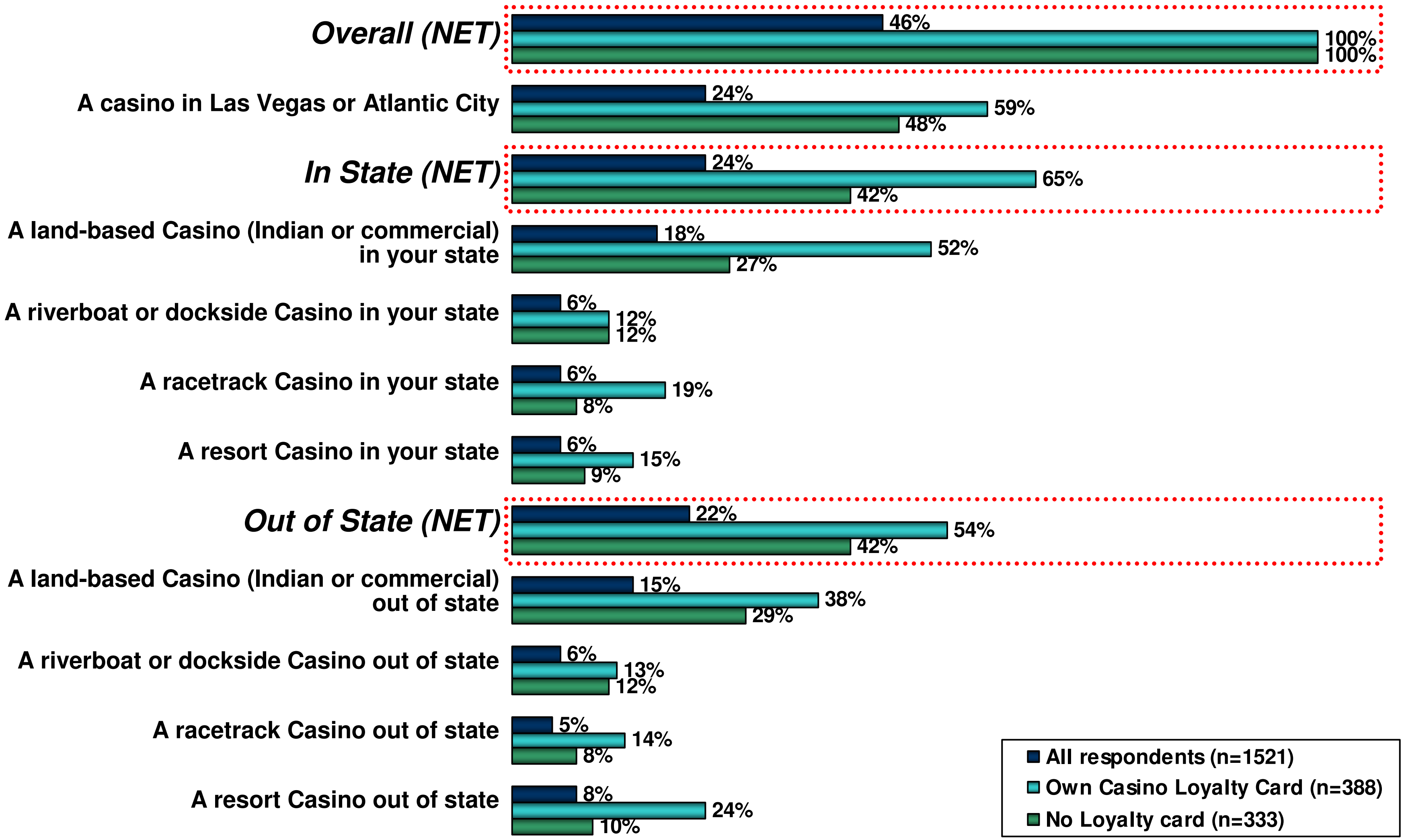
Significant Finding!

Lower loyalty card ownership among 'emergent market' of 18-29 year olds likely helps explain their lack of commitment to casino patronage as part of their entertainment choices

Q11. Do you currently own a play loyalty card to a Casino (any Casino)?

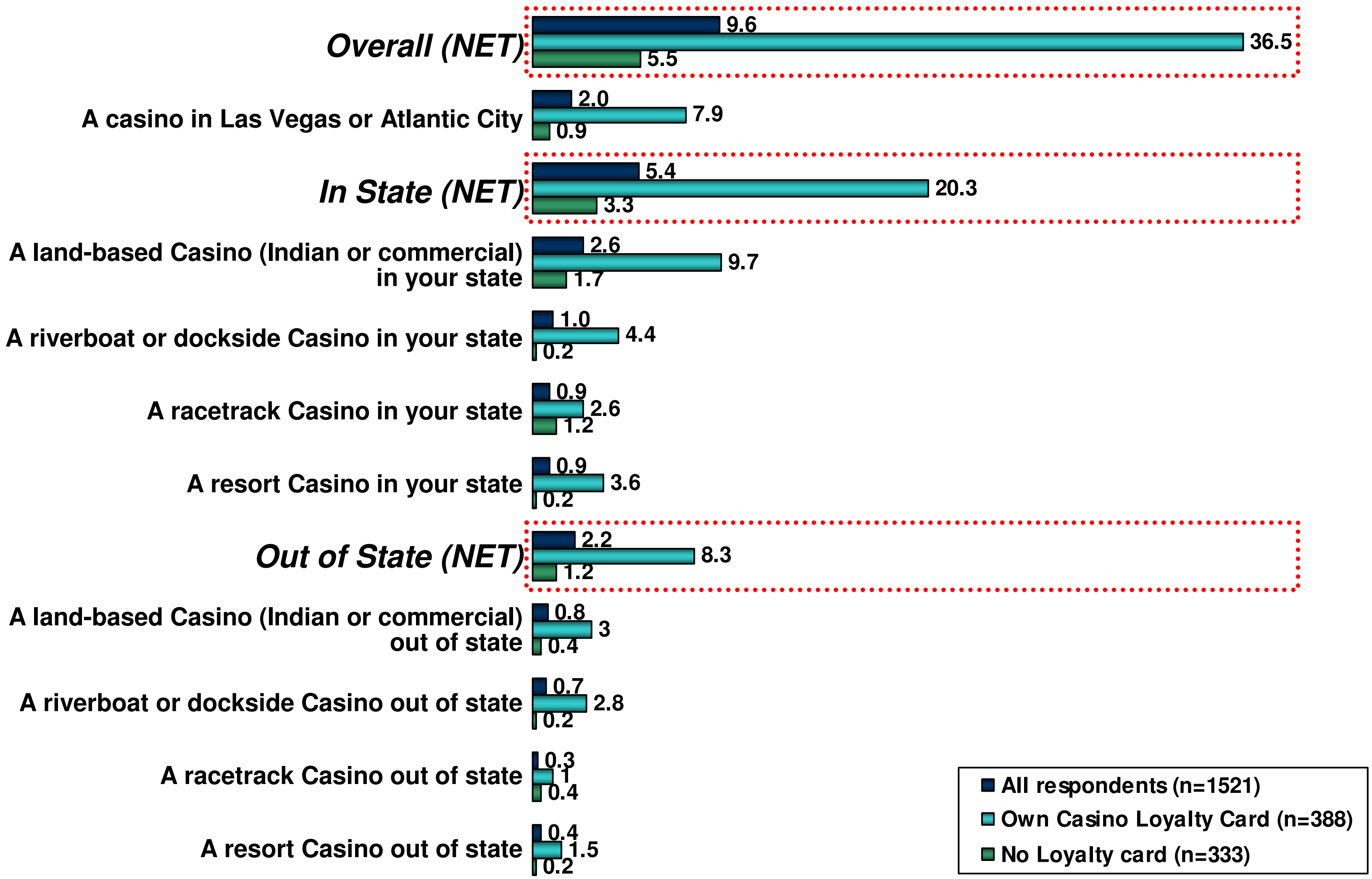
Base: Have visited a Casino in the past three years

Visited Each of the Following at Least Once in the Past Three Years – Participation Summary



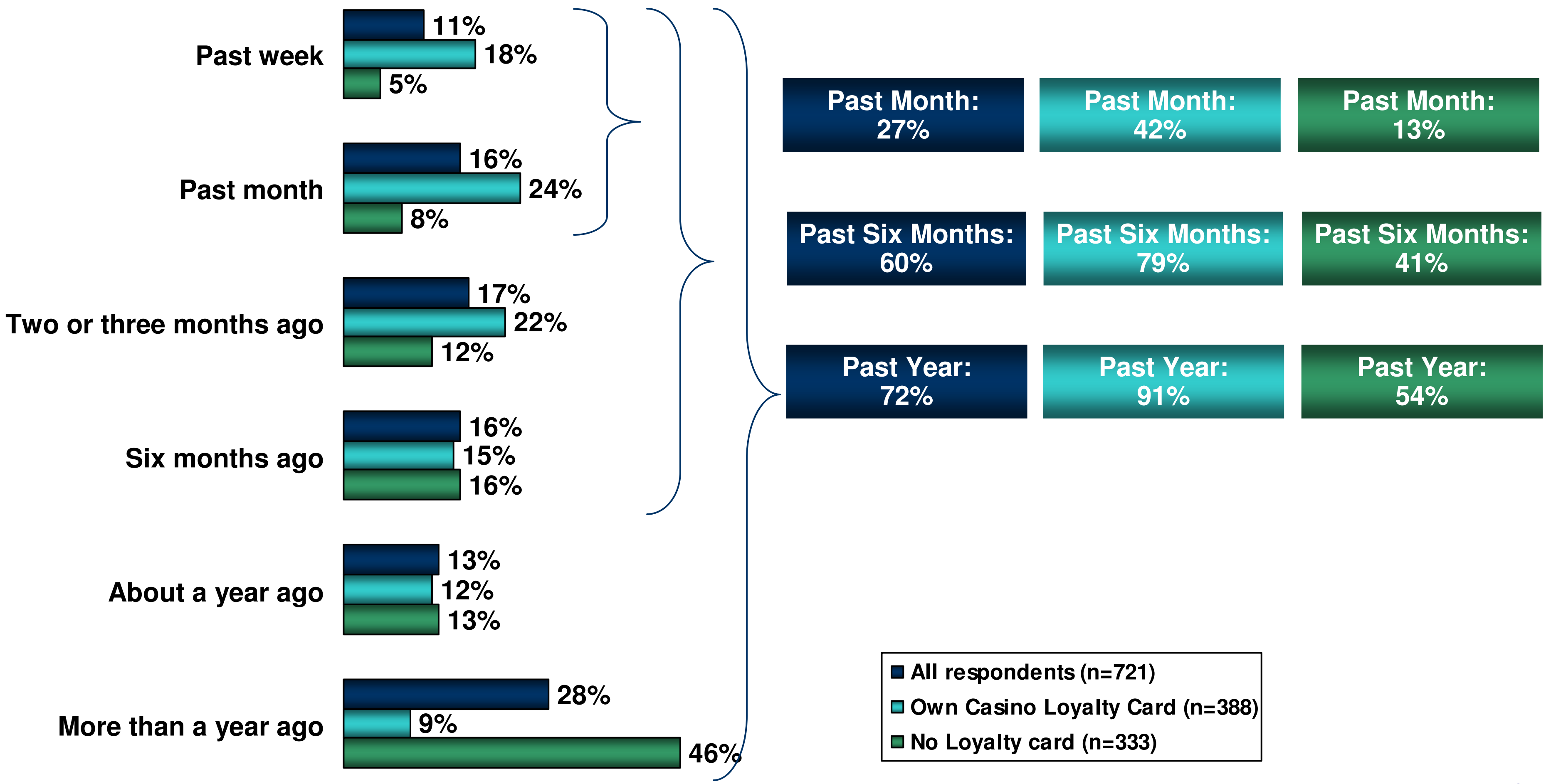
Q1. Thinking about the past three years, how many times have you visited the following?

Mean Number of Visits to Casinos in the Past Three Years



Q1. Thinking about the past three years, how many times have you visited the following?

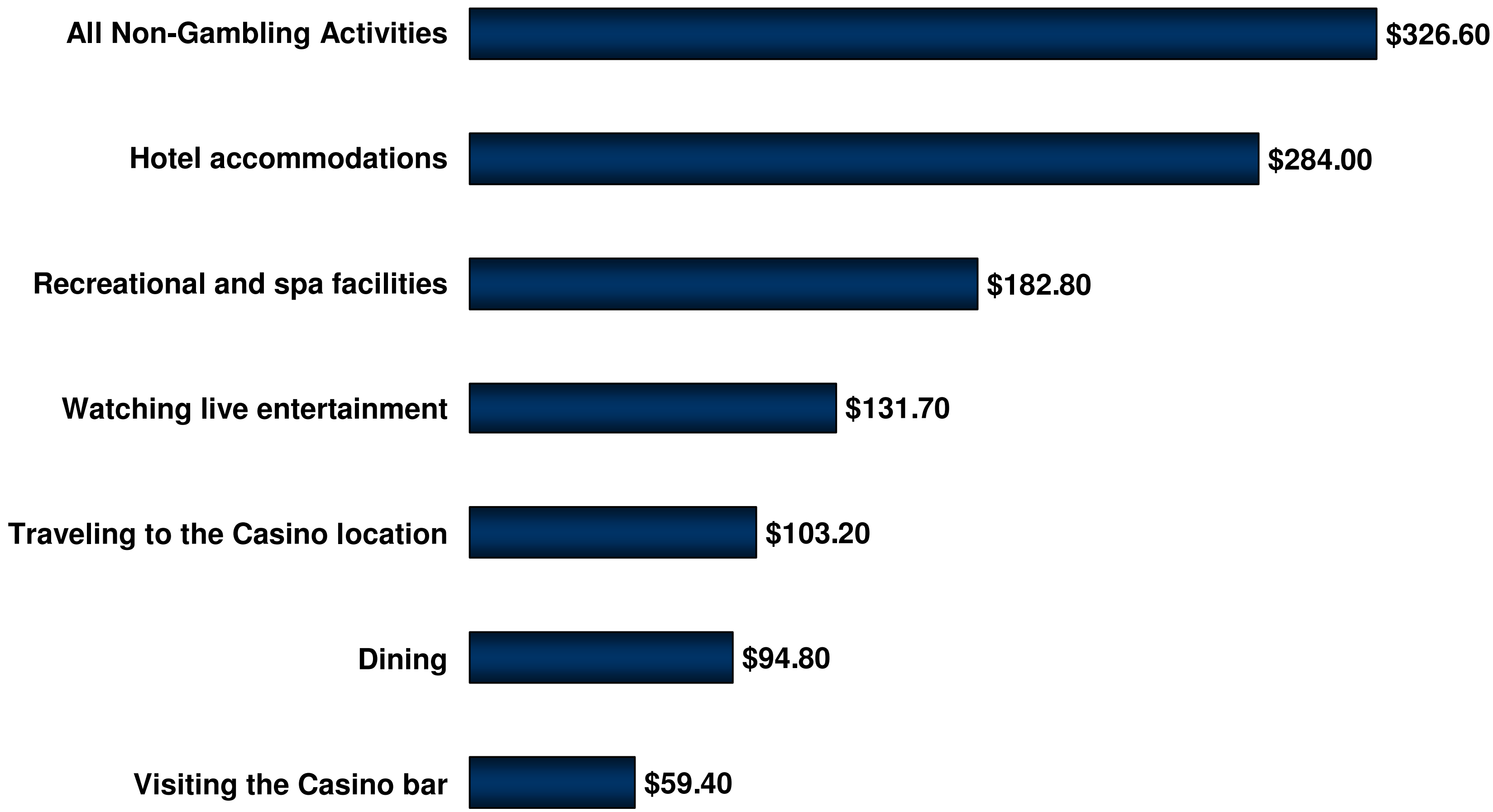
Last Visit to a Casino – Among Those Having Gone at Least Once in the Past Three Years



Q5. When was your last visit to any type of Casino?

Base: Have visited a casino in the past 3 years

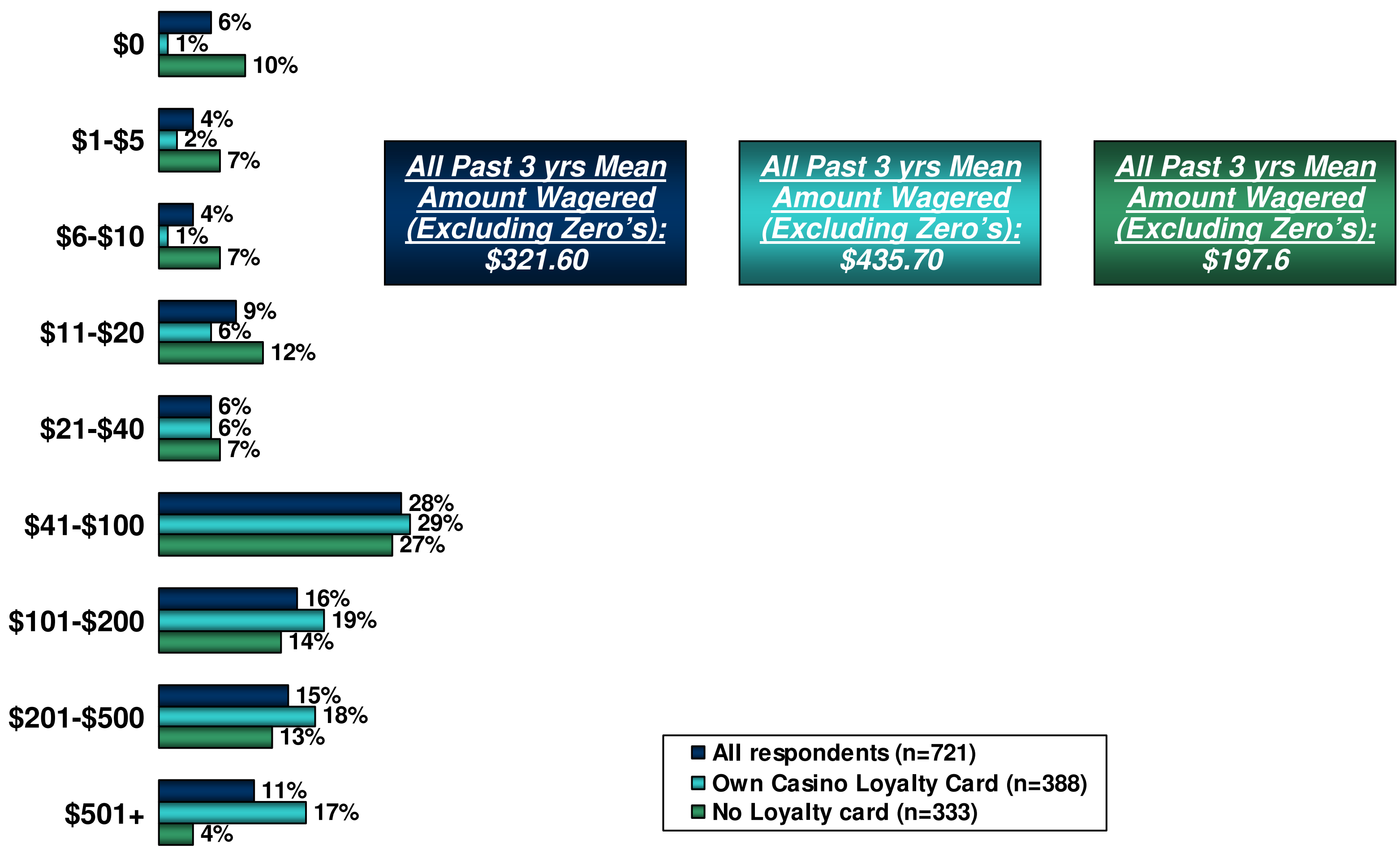
Mean Spend on Non-Gambling Activities During Last Casino Visit



Q8. (Mean Excluding 0 Summary). During your last visit to any type of Casino, approximately how much money did you spend on the following non-gambling activities...?

Base: Have visited a Casino in the past three years (n=696)

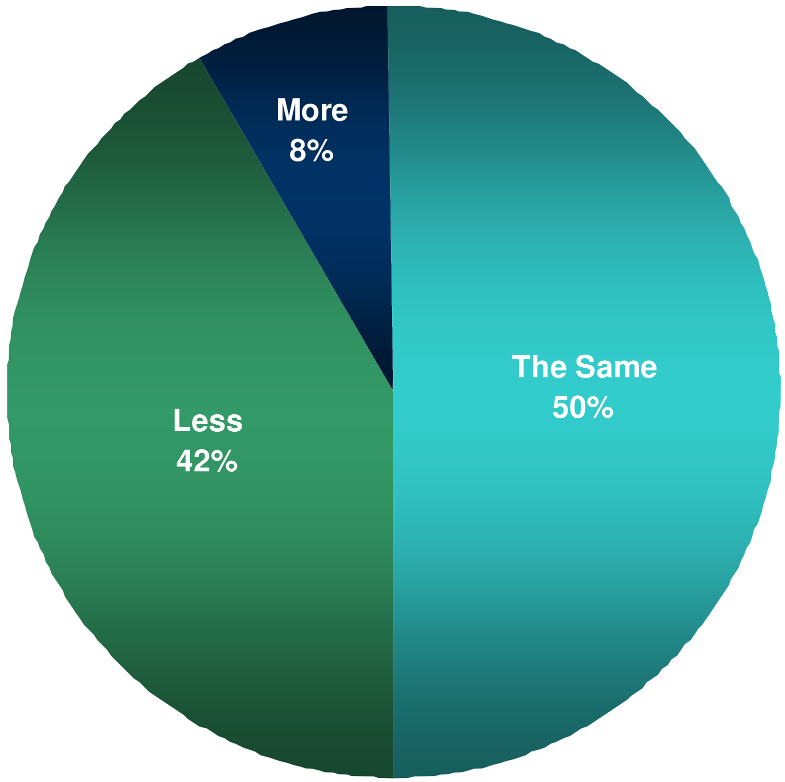
Amount Wagered on Gambling Activities During Last Visit



Q7. During your last visit to any type of Casino, in total, approximately how much money would you say you have wagered on all gambling activities combined, such as slots, table games, track betting, sports books, etc.?

Base: Have visited a casino in the past 3 years

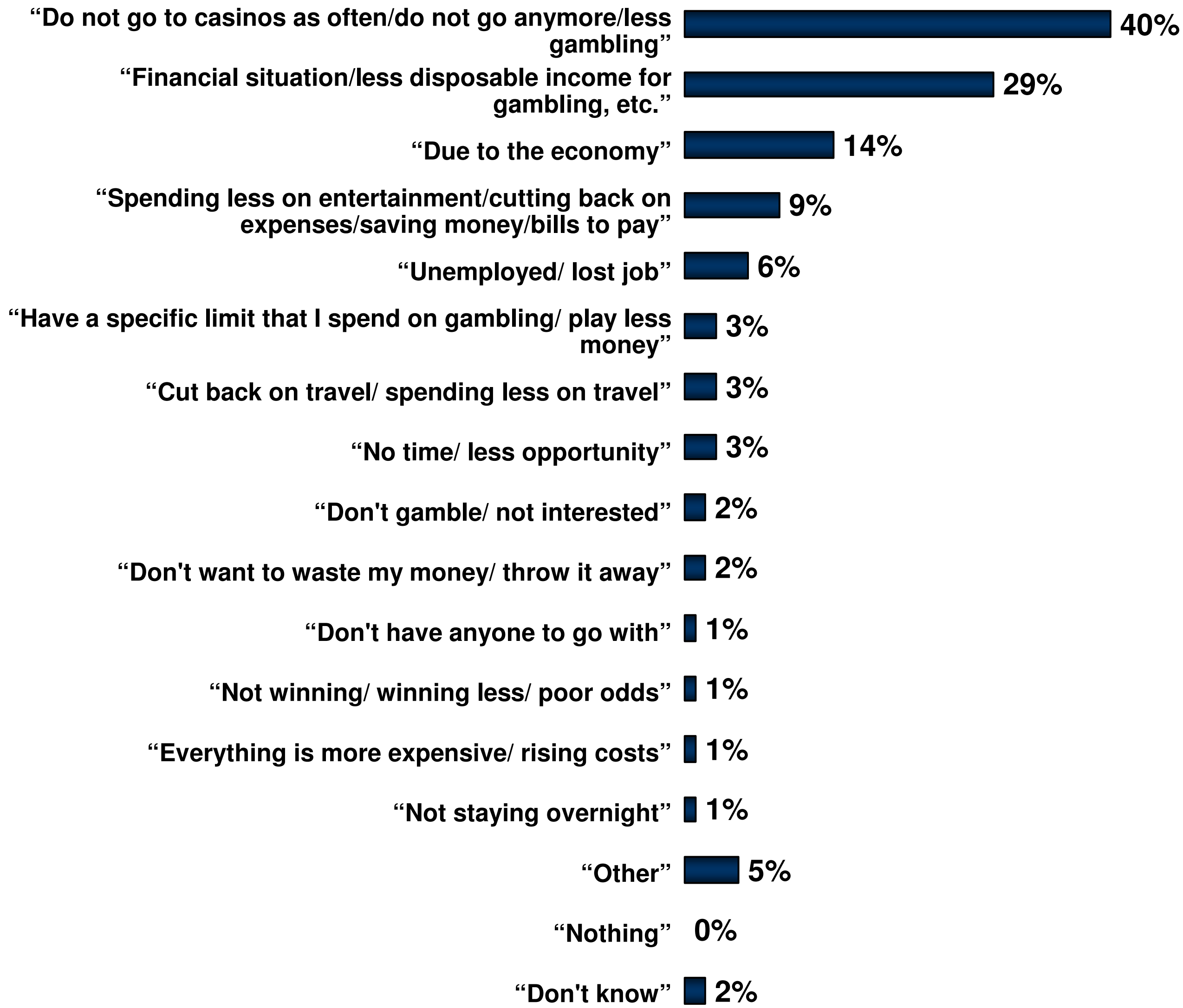
Spending More, The Same, or Less Money at Casinos Compared to One Year Ago



Q9. Overall, would you say that you are spending more, the same, or less money at Casinos than you were compared to one year ago?

Base: Have visited a Casino in the past three years (n=696)

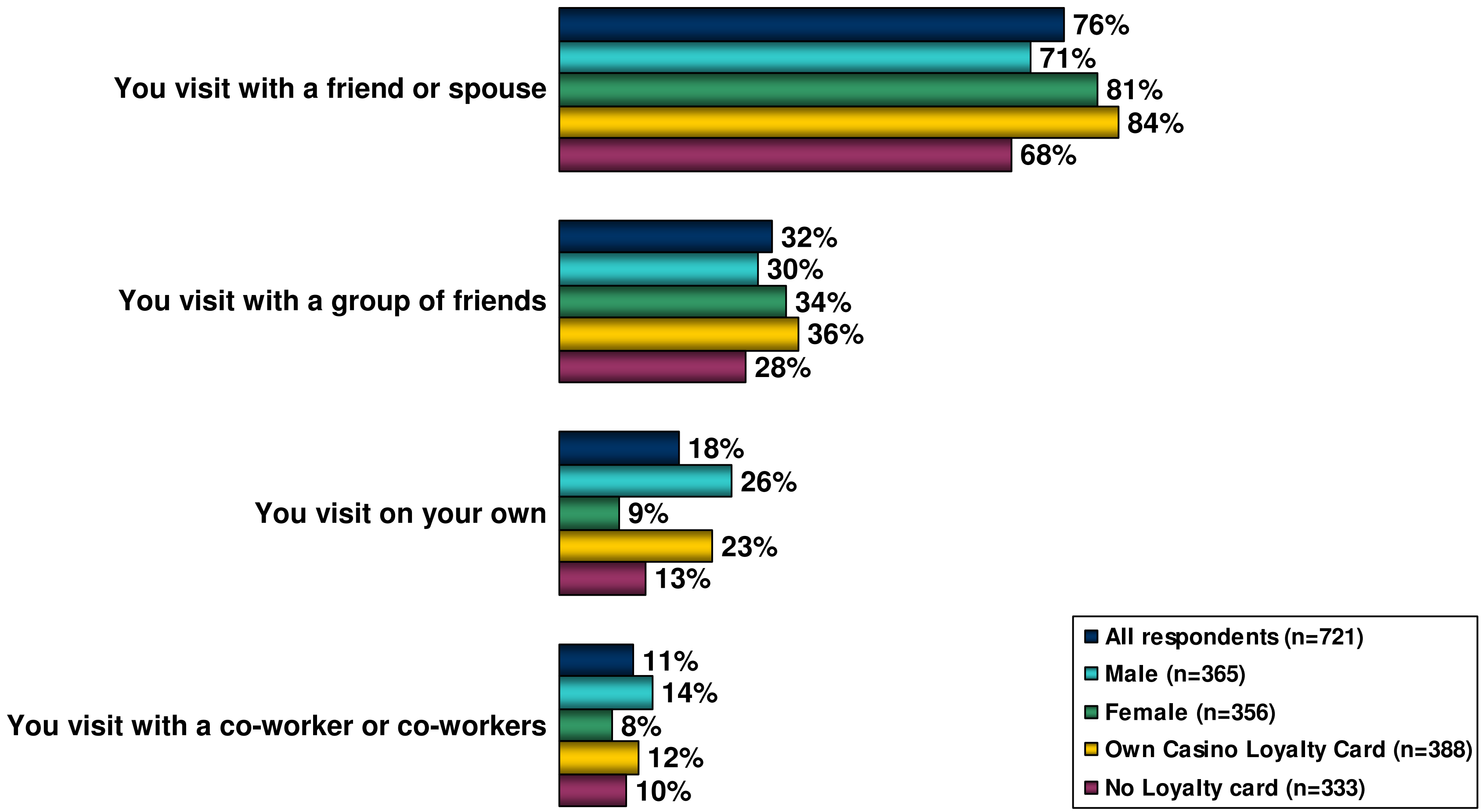
Reasons for Spending "Less" at Casinos Compared to a Year Ago



Q10. What makes you say that you are spending less money at Casinos than you were compared to a year ago?

Base: Spent less money at casinos than one year ago (n=289)

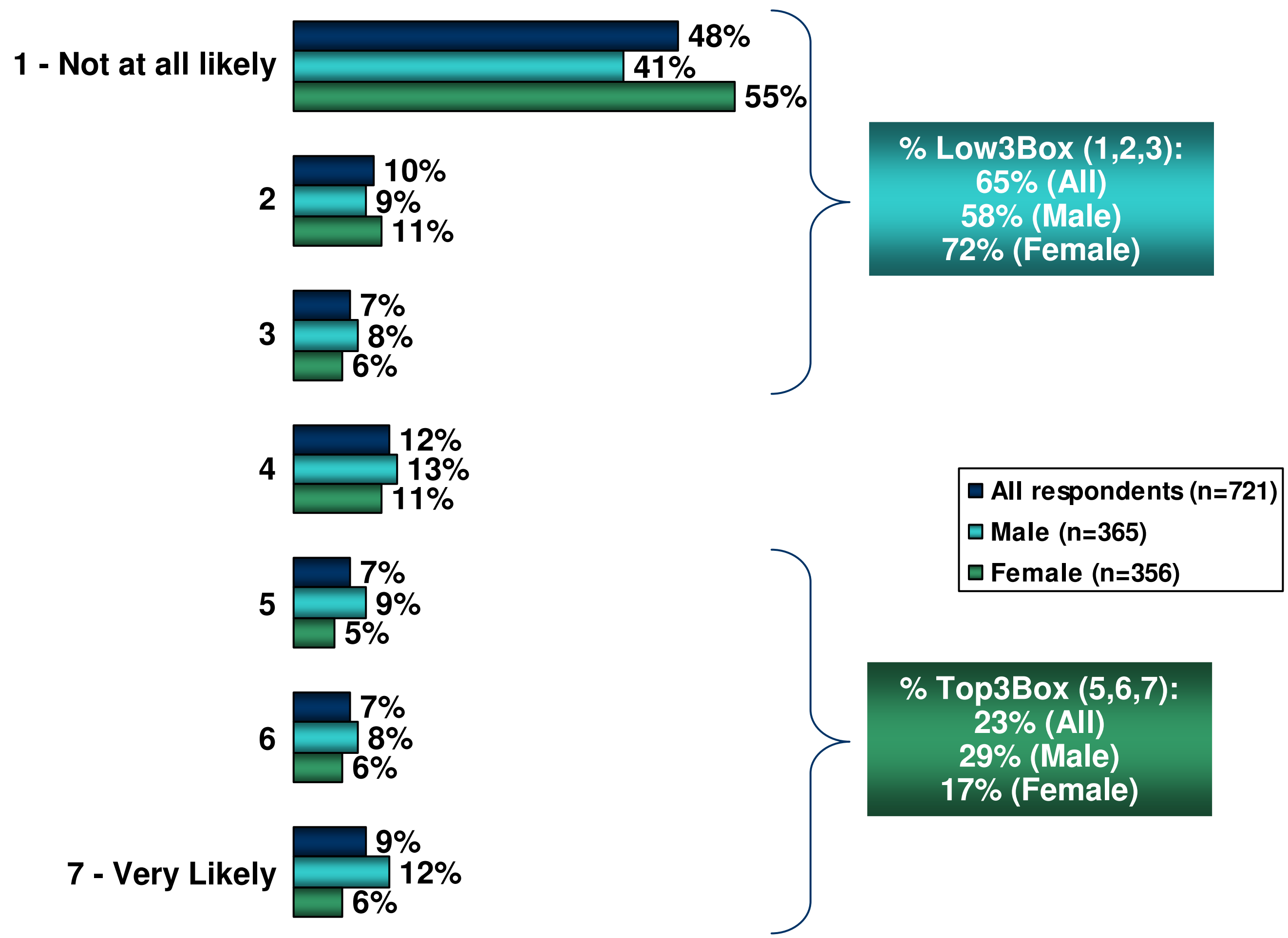
Who Casino Patrons Visit the Casino With



Q12. How do the following statements describe a typical visit for you to a Casino?

Base: Have visited a casino in the past 3 years

Likeliness of Playing Casino Games (Offered by Favoured Casino Operator) on the Internet for Real Money



Q13. If your favorite Casino were to offer Casino style gaming (slot machines, roulette, Blackjack, Poker, Craps, etc.) for real money on the Internet, how likely would you be to play using a scale from 1 to 7 where 1 means Not at all likely and 7 means Very Likely.

Base: Have visited a casino in the past 3 years

Likeliness of Playing Casino Games (Offered by Favoured Casino Operator) on the Internet for Real Money

By Age Group

%	Total (n=721)	18-29 (n=46)	30-44 (n=154)	45-54 (n=170)	55+ (n=351)
Low3Box (1,2,3)	*64%*	*46%*	*52%*	*72%*	*80%*
1 – Not at all likely	48%	27%	35%	54%	66%
2	10%	11%	11%	11%	8%
3	7%	8%	7%	8%	6%
4	12%	19%	13%	12%	8%
5	7%	8%	12%	8%	3%
6	7%	15%	10%	1%	3%
7 – Very likely	9%	12%	12%	7%	7%
Top3Box (5,6,7)	*23%*	*35%*	*34%*	*17%*	*12%*

Q13. If your favorite Casino were to offer Casino style gaming (slot machines, roulette, Blackjack, Poker, Craps, etc.) for real money on the Internet, how likely would you be to play using a scale from 1 to 7 where 1 means Not at all likely and 7 means Very Likely.

Base: Have visited a casino in the past 3 years

Likeliness of Playing Casino Games (Offered by Favoured Casino Operator) on the Internet for Real Money

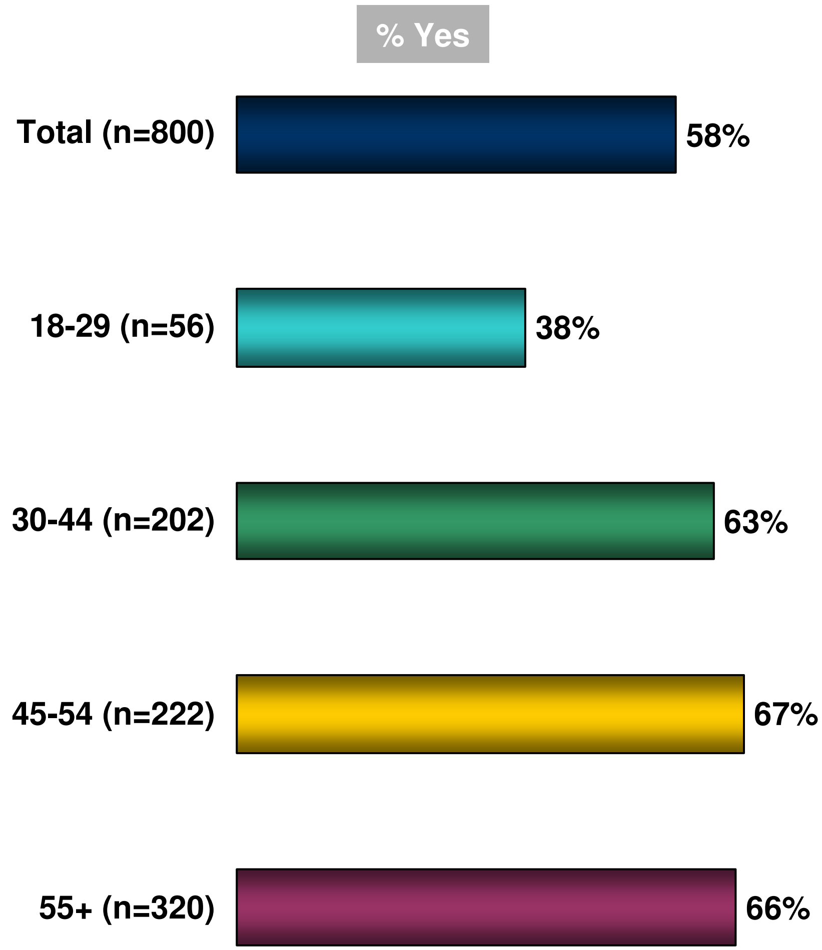
By Income Group

%	Total (n=721)	<45K (n=197)	$45-74K (n=203)	$75+K (n=289)
Low3Box (1,2,3)	*64%*	*68%*	*55%*	*68%*
1 – Not at all likely	48%	49%	42%	50%
2	10%	9%	9%	11%
3	7%	10%	4%	7%
4	12%	13%	17%	7%
5	7%	7%	8%	8%
6	7%	5%	7%	9%
7 – Very likely	9%	7%	14%	8%
Top3Box (5,6,7)	*23%*	*19%*	*28%*	*25%*

Q13. If your favorite Casino were to offer Casino style gaming (slot machines, roulette, Blackjack, Poker, Craps, etc.) for real money on the Internet, how likely would you be to play using a scale from 1 to 7 where 1 means Not at all likely and 7 means Very Likely.

Base: Have visited a casino in the past 3 years

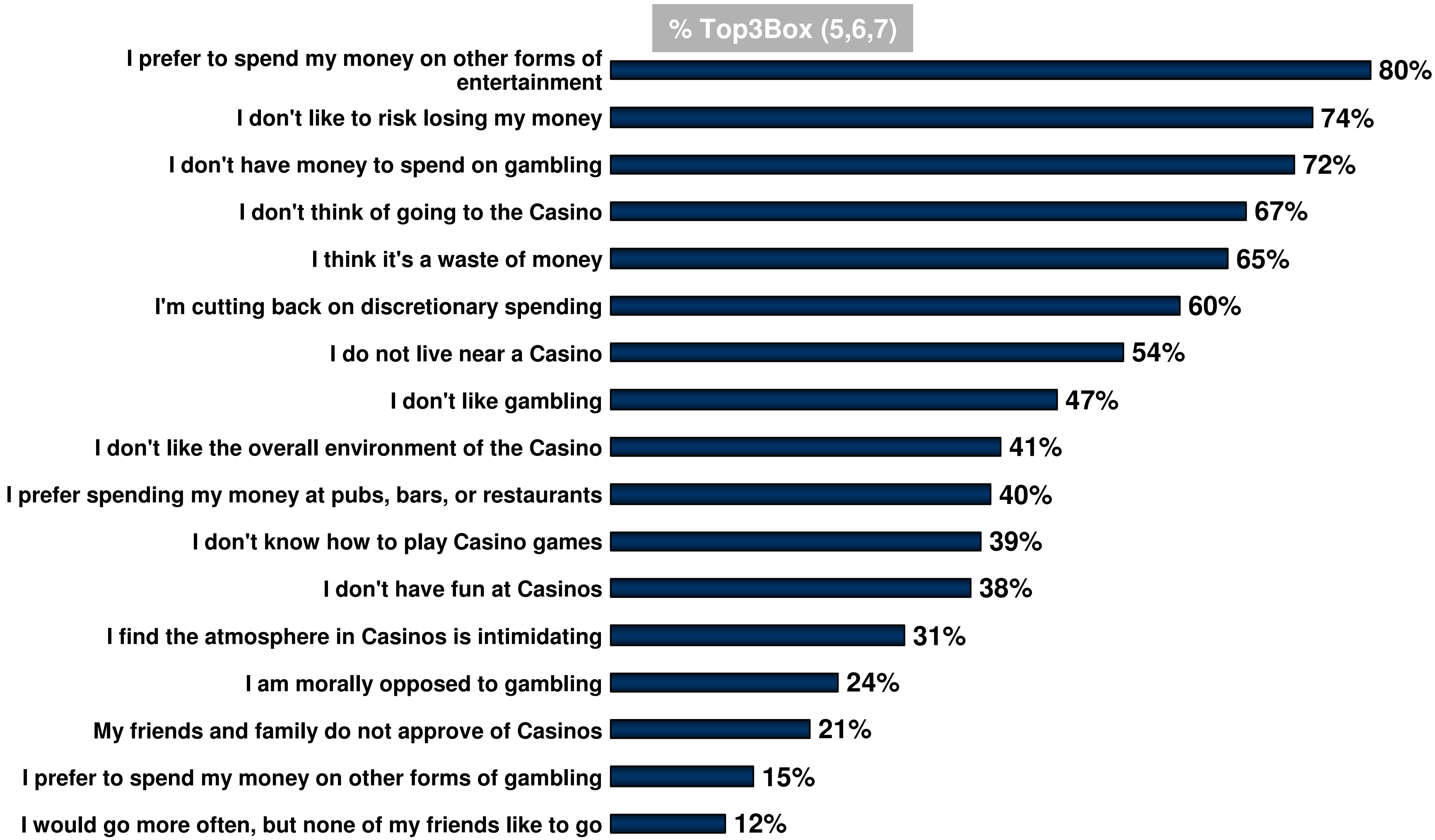
Ever Been to a Casino – Among Who Have Not Been in the Past Three Years



Q2. Have you ever been to a Casino?

Base: Have not visited a casino in past 3 years

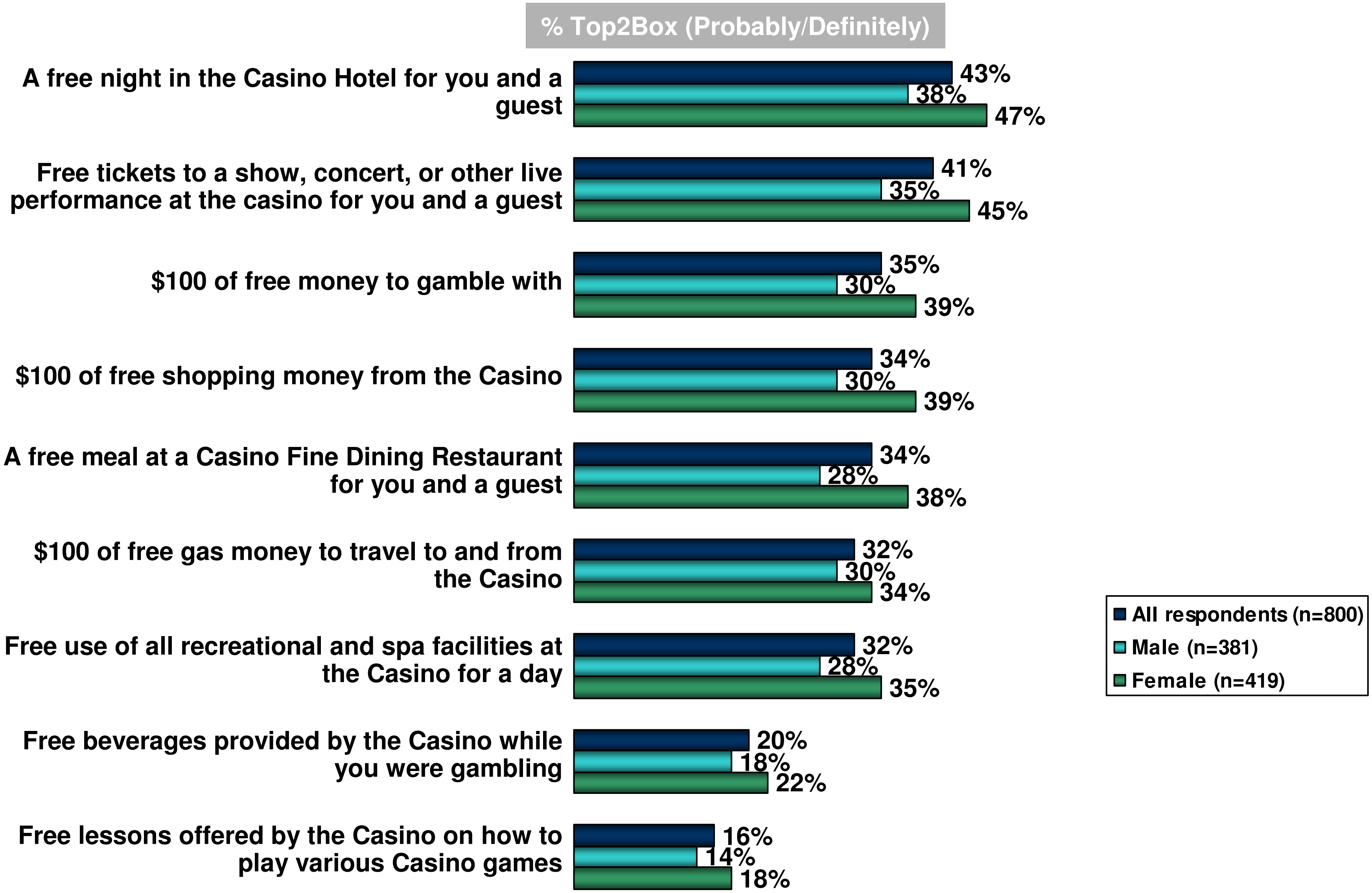
Reasons for not Visiting a Casino Recently



Q3. The following item displays potential reasons as to why certain individuals may choose to not visit Casinos. Please indicate your level of agreement with each statement on a scale from 1 to 7, where means Completely Disagree and 7 means you Completely Agree. I do not visit Casinos because…

Base: Have not visited a casino in past 3 years (n=825)

Driving Non-Casino Patrons to the Casino



Q4. Would you visit a casino if you had…?

Base: Have not visited a casino in past 3 years

Demographics

	Total (n=1521)
Gender	
Male	50%
Female	50%
Age	
Under 29	22%
30-44	28%
45-54	20%
55+	31%
Region	
Midwest	21%
Northeast	18%
South	36%
West	22%
Don’t know	2%
Income	
Under $25,000	19%
$25,000 - $44,999	22%
$45,000 - $74,999	27%
$75,000 - $99,999	14%
$100,000 - $149,999	9%
$150,000 or more	6%

Base: All respondents

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Legal mentions

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