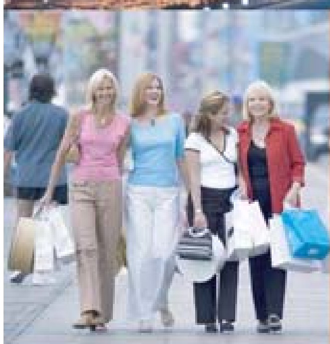


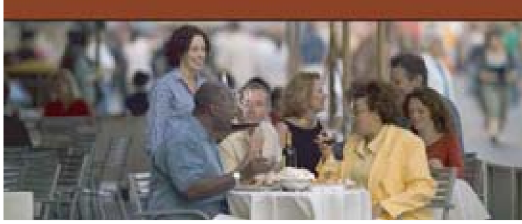


Atlantic City
Visitor Profile
2008



Atlantic City
convention & visitors authority ™

Prepared for
Atlantic City Convention & Visitors Authority
Jeffrey S. Vasser, President




SPECTRUM GAMING GROUP
Independent Research and Professional Services

TABLE OF CONTENTS

ACKNOWLEDGEMENTS

The Atlantic City Convention & Visitors Authority and Spectrum Gaming Group thank all the members of the Atlantic City community whose cooperation made this research study possible. We especially appreciate the cooperation and assistance received from the Atlantic City retail, hotel and casino industries, as well as the management and personnel of the Boardwalk Hall and Convention Center. We also thank the many visitors to the city who contributed their time and shared their opinions in making this study successful.

TABLE OF FIGURES

EXECUTIVE SUMMARY: MEETING CHALLENGES, FINDING OPPORTUNITIES

The 2008 Visitor Profile was undertaken during a period that was clearly a year of both promise and concern for Atlantic City. The survey began in 2007 – the first year in which Atlantic City ever recorded a decline in annual casino revenue – and continued through the first half of 2008, a year in which a severe economic downturn began to impact the local and national economies. Atlantic City faced new competition from emerging markets in other eastern states.

At the same time, visitors to the resort have been treated to a growing array of new attractions, from retail and dining to spas and hotel towers. The 2008 Visitor Profile reflects the challenges and opportunities that the business community, as well as the public sector, need to address. The survey demonstrates that Atlantic City remains an attractive destination for gamblers and is increasing its appeal to other travel segments, which include general tourists, convention visitors and shoppers. The survey indicates that:

- 94% of visitors expressed satisfaction with their overall experience.
- 96% of visitors view Atlantic City as becoming more attractive.
- 99% would recommend Atlantic City to friends or family members.

Nearly one-fifth of the adults surveyed – 18 percent – indicated they are now visiting Atlantic City more frequently. Within this group:

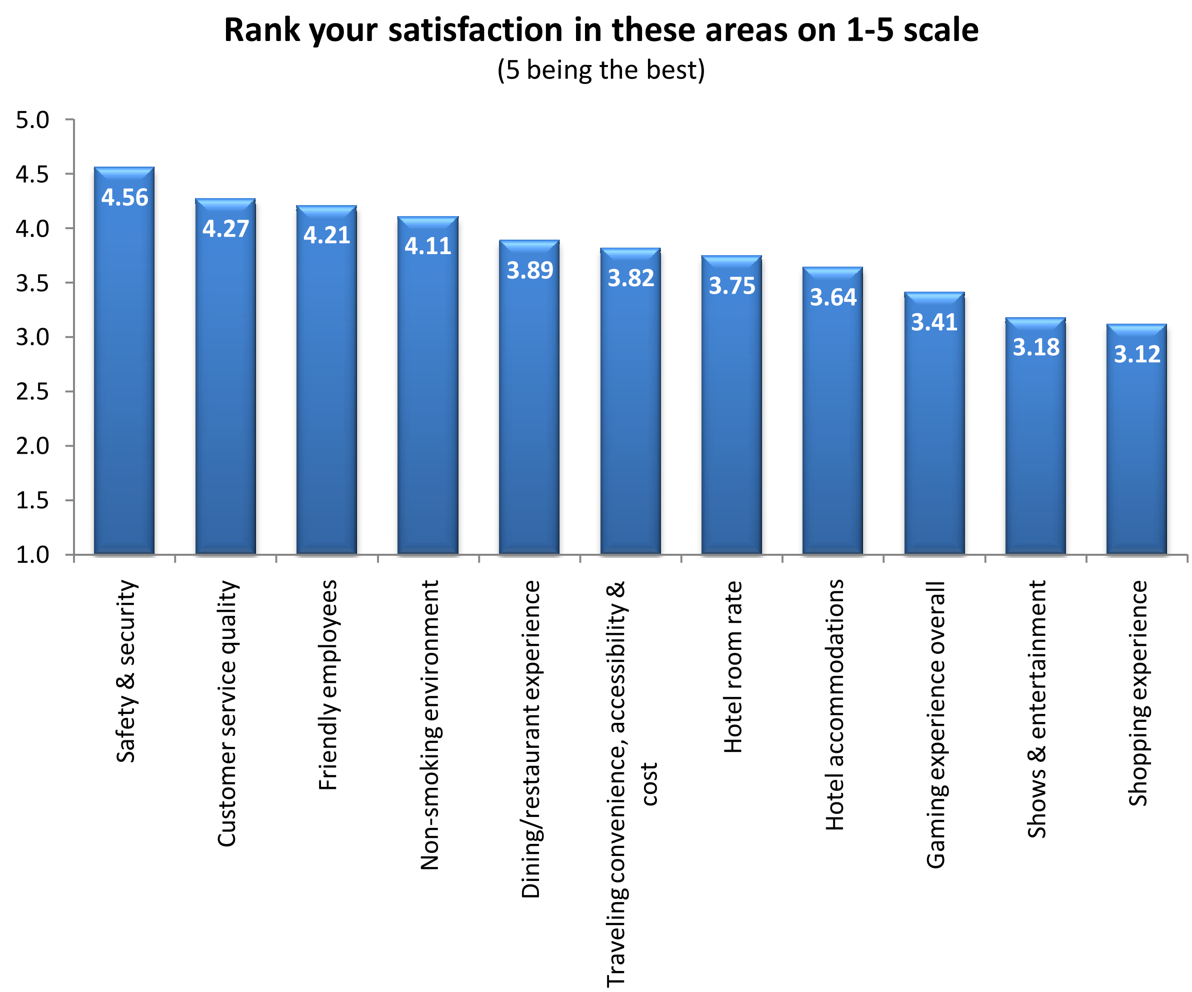
- 28% cited “more things to do” as the primary reason for increased visitation.
- 20% cited “new/better attractions,” including new shopping, gaming and dining attractions.

Among those adults who expect to visit more frequently, 28 percent are primarily shoppers, while 25 percent are general tourists, and 21 percent are attending concerts, shows or special events.

Despite these very favorable perceptions of the destination, Atlantic City faces challenges in the form of increased visitation to alternative resort and gambling destinations. One-third of all visitors (34%) regularly gamble elsewhere, most frequently:

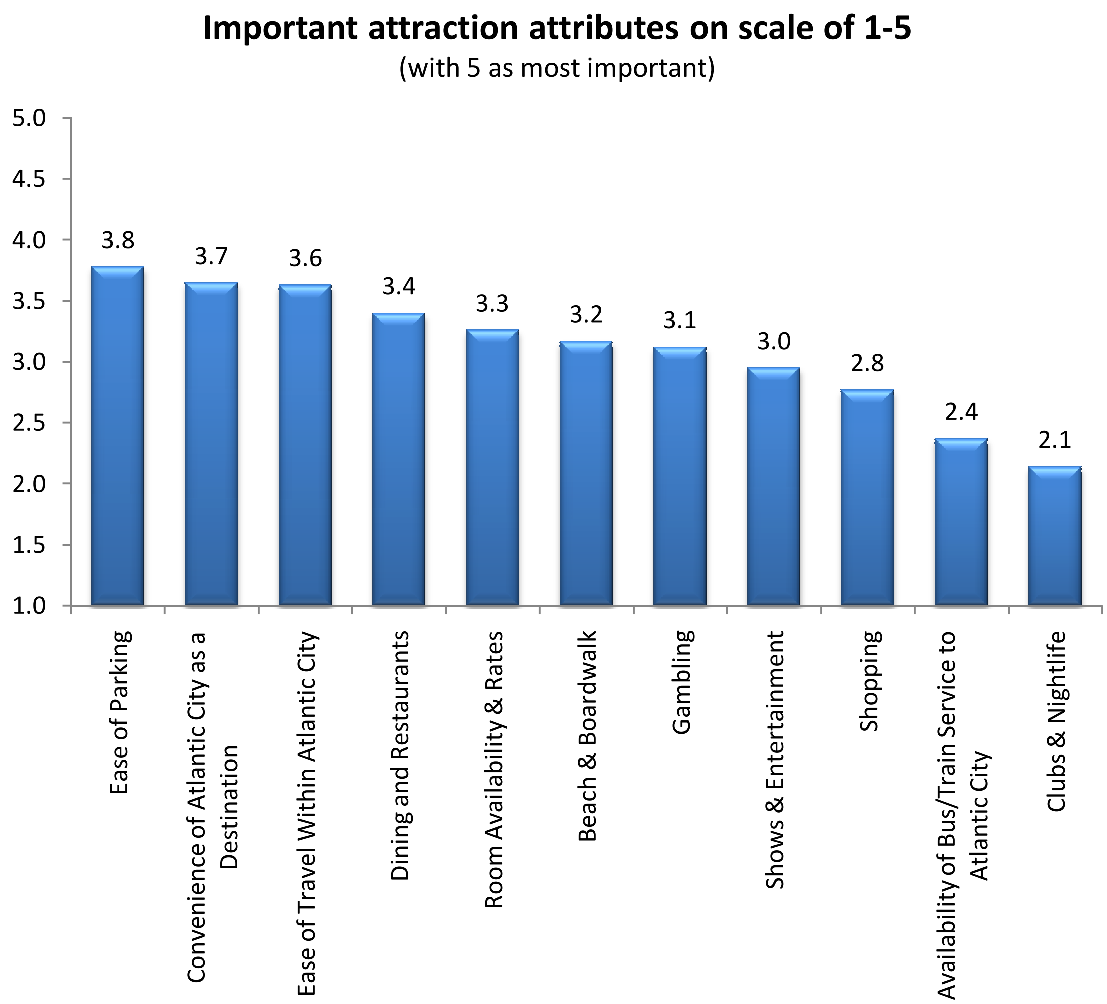
- Las Vegas or Nevada: 31%
- Pennsylvania: 20%
- Connecticut: 15%
- Delaware: 8%
- New York: 8%

The study provides insights into the importance that visitors place on specific elements of their Atlantic City experience, as shown here:



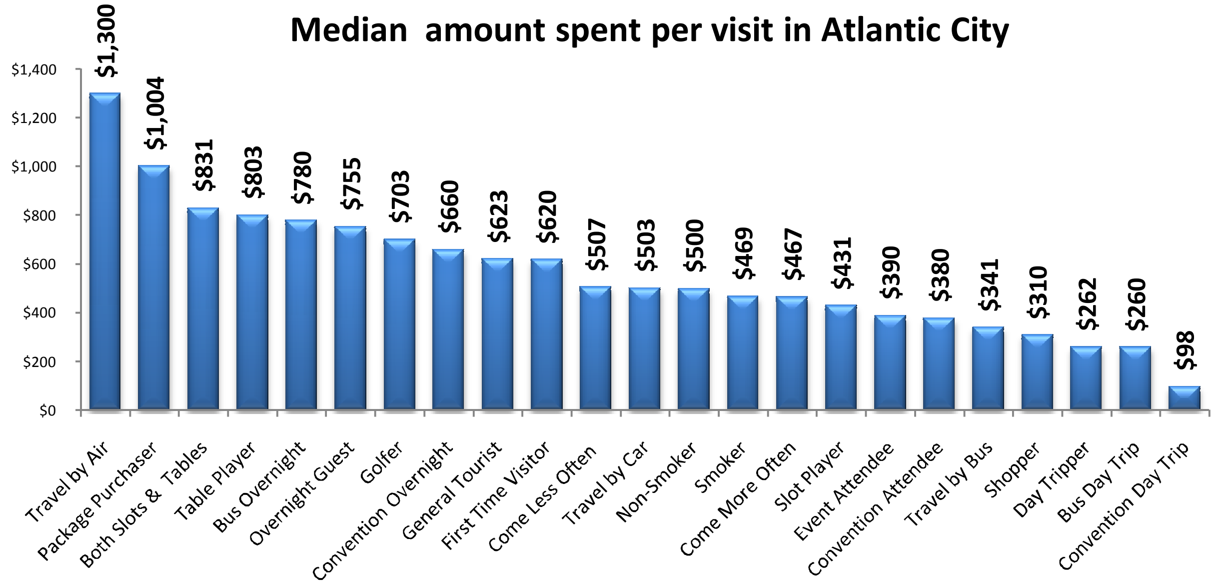
The report also examines the factors that visitors consider important when making a decision as to whether or not they will visit Atlantic City. We tested a range of attraction attributes to measure relative attraction levels. We asked survey respondents, "How important were each of the following in your decision to visit Atlantic City?"

Gambling, the primary reason that most people come to Atlantic City, ranks seventh on average as an attraction attribute.

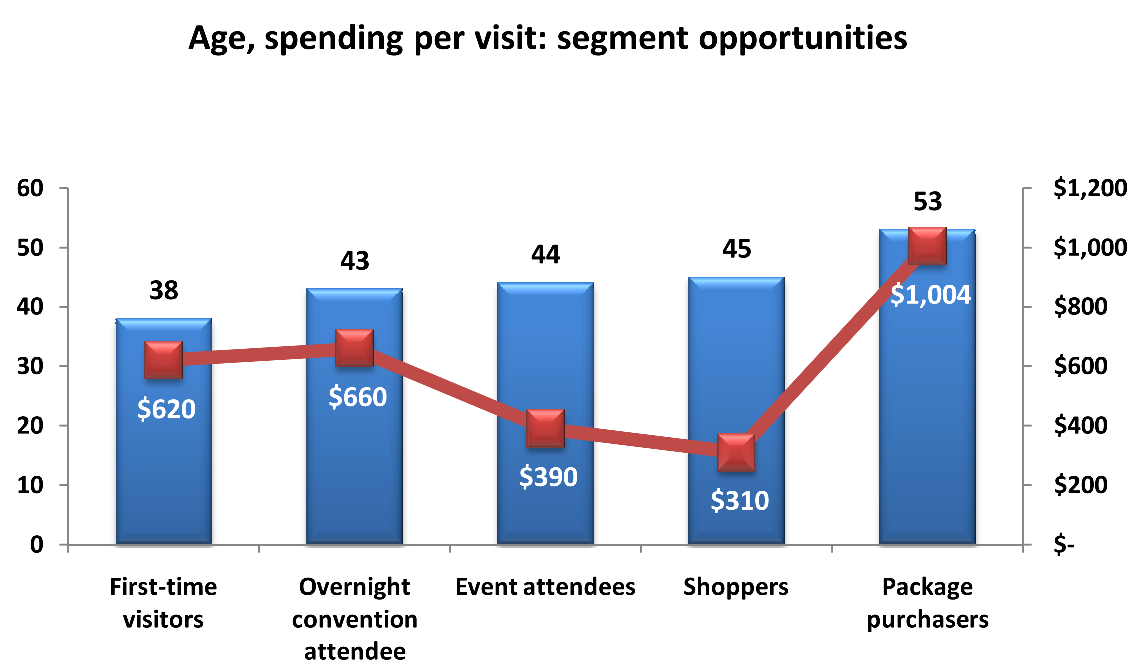


The 2008 Visitor Profile demonstrates that – in a resort that generates more than 30 million annual visits – there exist many segments, and many opportunities to expand the visitor base. These segments vary in terms of their motivation, their demographics and their spending levels. Invariably, however, these segments tend to be largely impressed by what they find – and largely appear amenable to visiting more often.

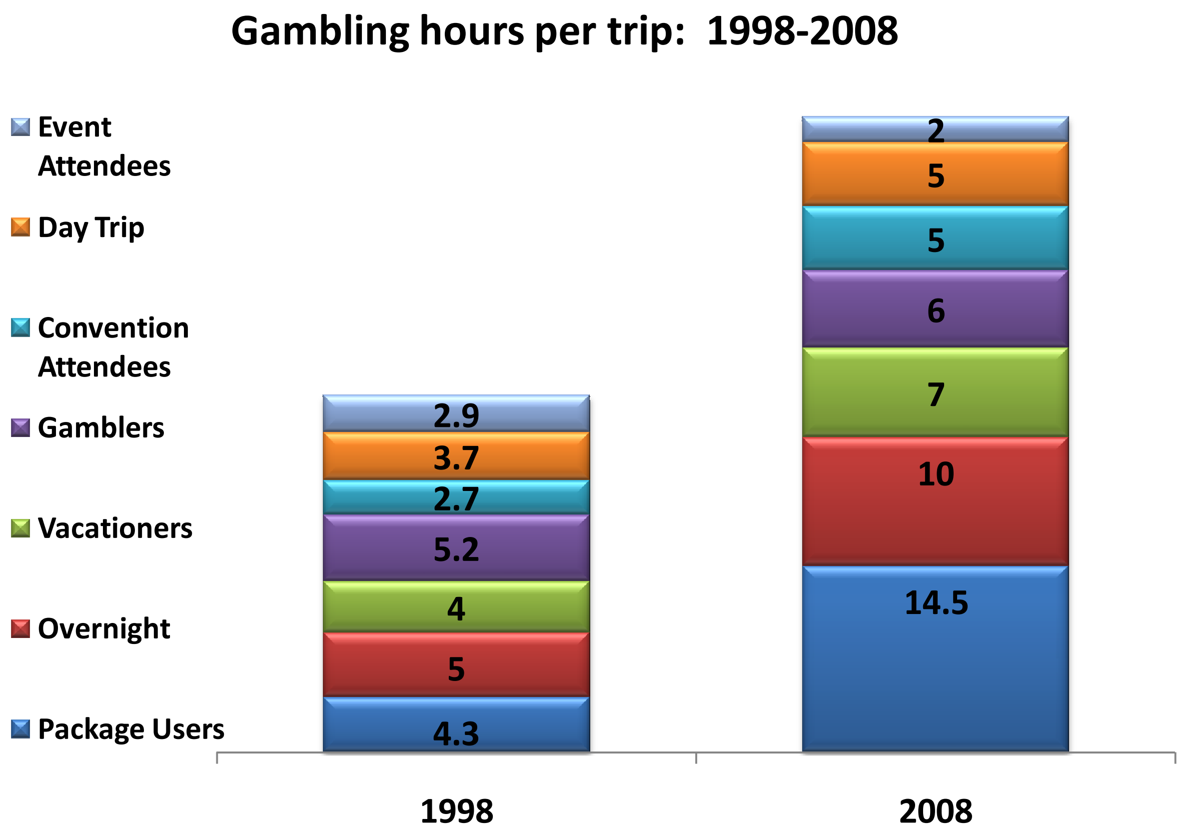
The following chart shows the level of spending by a variety of segments:



Many of these segments tend to have a combination of relative youth and relative affluence. Their youth represents an opportunity, since they will have many more years of potential visits. Their affluence is also attractive, since they would have more to spend. The following chart tracks the spending per visit and the age for a few key segments:



The 2008 Visitor Profile Study also examines trends over time in Atlantic City, and the findings are clearly positive, with many of the identified segments spending far more than they did in 1998. The following chart contrasts the number of hours in which visitors spend on gambling over the same 10-year period:



We identified segments in various ways, from geographic areas to the primary purpose of the visit. For example, the following chart shows spending patterns from visitors from various regions in the eastern United States.[1]

Note that the charts show more than the value of expanding the geographic reach of Atlantic City to a broader region, but also demonstrate the material difference in value between overnight guests and day-trip visitors.

Numerous segments appear to offer significant opportunities for future visitation, including:

- Shoppers
- Event attendees
- Convention and meeting attendees, particularly those who stay overnight

[1] For purposes of this analysis, we have included the small number of respondents from Delaware in the Pennsylvania segment.

- First-time visitors

Shoppers were one of the most notable segments on which we focused, in part because many of the shopping venues that are popular in Atlantic City today did not exist when previous visitor profiles were conducted. Those who visit Atlantic City primarily to shop:

- Visit six times per year
- Spend a median $310 per trip, with a shopping budget of $175
- Have a median age of 45
- Are predominantly female (75%)

Notably, 100 percent of these retail customers would recommend Atlantic City to friends or family.

Event attendees spend a median:

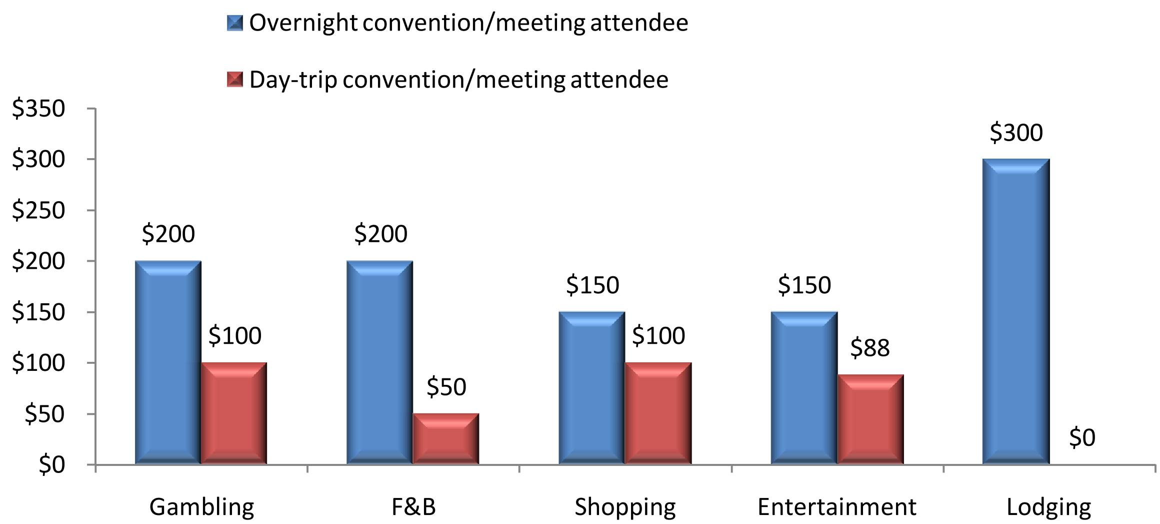
- 10 hours per visit in Atlantic City.
- $100 on entertainment per visit, plus $60 on food and beverage.

Convention visitors – those who come to Atlantic City to attend a convention, trade show, or business meeting – spend a median of three nights per visit, with a median overall budget of $380. Significantly, 60 percent of convention attendees are likely to be more interested in attending a convention, trade show or business meeting because it was held in Atlantic City.

This segment has an overall median budget per visit of $382. Of those who gamble, the median budget is $100.

Convention and meeting attendees – particularly those who stay overnight – also remain an attractive segment, as shown in the following chart:

Convention/meeting attendees: spending per visit



Among convention visitors, Atlantic City is an attractive destination. Asked whether they would be more or less interested in attending a convention, trade show or business meeting because it was held in Atlantic City, 59.5% replied yes, while only one in 20 (5.1%) of these respondents say that they are less interested in attending because the event is held in Atlantic City.

This result compares favorably with an identical question asked in the Las Vegas Visitor Profile beginning in 2006, when 48% replied in the affirmative, as well as in 2008, when 63% of respondents said that they were more interested in attending a convention, trade show, or business meeting because it was held in Las Vegas.

General tourists – defined as those who describe the reason for their visit as "vacation/pleasure" – are also a valuable visitor segment. These visitors generally stay longer and, as a result, spend more over a single trip. However, they visit less frequently than some other segments, which limits their overall worth.

These general tourists:

- Spend a median of $623 per visit, with a gambling budget of $200 per visit
- Stay a median of two nights per visit
- Gamble for seven hours per visit

This group will spend a median:

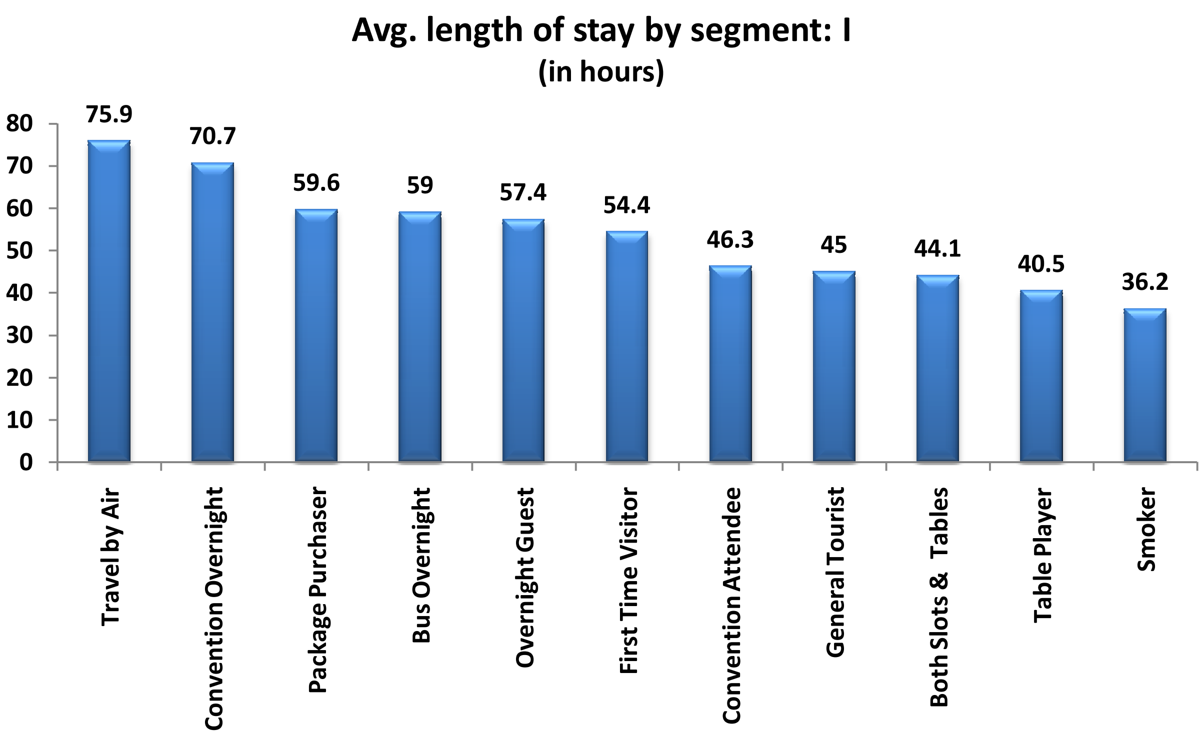
- $268 per night for lodging
- $200 on shopping
- $25 on travel

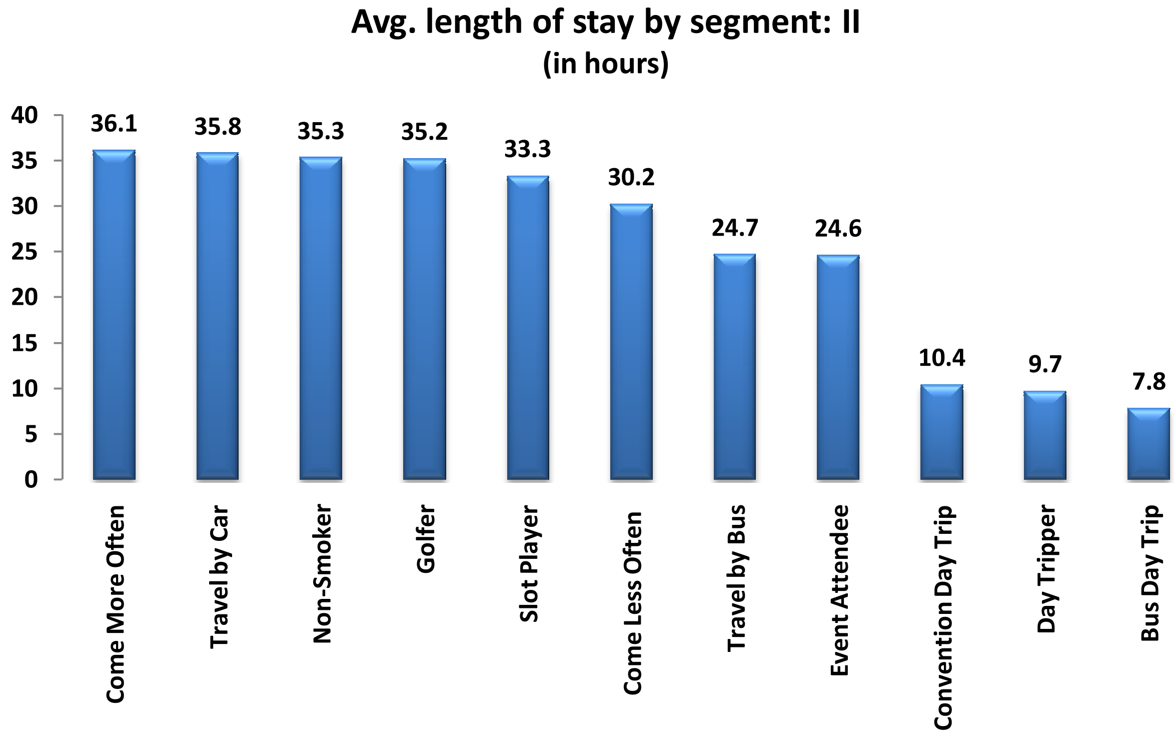
The overall survey – as well as the various segments – demonstrates that Atlantic City can attract visitors with desirable demographics.

More than one-third of those interviewed in 2008 are college graduates, up significantly from previous surveys, and while the median age remains unchanged, the proportion of retirees has declined over the past decade. The proportion of visitors with children living in the household has steadily increased over the past three survey waves. Most importantly, positive satisfaction levels ("extremely well" or "very" well satisfied with Atlantic City) have risen from the already high levels observed in a visitor profile study conducted 10 years ago, from 91% in 1998 to 94% in 2008.

Total spending per visit has increased from a median amount of $184 in 2004 to a median of $331 in 2008. Atlantic City visitors are now spending more on non-gaming amenities, and that the resort is evolving into a less gambling-centric and more broadly attractive tourist destination. The category where median spending has grown most is food and beverage, demonstrating that visitors in 2008 are increasingly likely to spend more on dining than they did four years ago.

Spending, however, is not the only critical metric when it comes to assessing visitation trends: Length of stay is telling, and – as the following charts show – it can vary significantly by segment:





Overall, the 2008 Visitor Profile Study demonstrates that Atlantic City's ongoing evolution into a regional destination that extends beyond convenience gambling can work. The resort has proven appeal to a variety of demographic segments, and more attractions will almost certainly improve that appeal.

INTRODUCTION

The findings within this Visitor Profile Study are most useful if they are understood within the context of where Atlantic City has been and where it needs to go. ACCVA President Jeffrey Vasser recently commented in a *Wall Street Journal* story that detailed the evolution of Atlantic City from a gambling-centric economy to a more diversified entertainment economy: "For our survival, we couldn't rely on gaming anymore."[2]

Indeed, Vasser's statement crystallized what, for many, is the changing business model of Atlantic City. From the time the first casino opened in Atlantic City in May 1978 until the early and mid-1990s – when first Connecticut and then Delaware legalized casino gambling – the city's economy could rely on having a monopoly on casino gambling along the East Coast.

For that period, and into the next decade, Atlantic City could count on steady growth in gaming revenue, and essentially could build its business model on a customer base that was motivated by convenience. Gamblers had few options. Those options have expanded, and will continue to expand, adding more urgency to Vasser's suggestion that Atlantic City's survival depends on a diversified entertainment offering.

The findings from the Visitor Profile Study not only support that suggested strategy, but also pinpoint some specific tactics that could advance that goal.

It is important to note that Atlantic City is not alone in its quest to evolve beyond gaming. Las Vegas remains the prime example of such an evolution. Las Vegas – despite temporary problems related to economic slowdowns – remains on a long-term growth curve, irrespective of the fact that few adults visit Las Vegas because it is the most convenient place to gamble.

In the same article in which Vasser made his observation, Borgata President and Chief Executive Officer Larry Mullin pointed out that perceptions of Atlantic City can change: "'When you look back at Las Vegas ... people said the same thing,'" says Larry Mullin. … However, once hotel companies started building luxury properties, he says, 'People's perception changed.'"[3]

Our study highlights marketing opportunities that could yield increased visitation and spending by existing customers. Still, a visitor profile study offers limited insights into why certain segments of the population are not visiting Atlantic City. The study examines the attitudes and attributes of people who are visitors. By definition, adults who are not visiting will not be represented in a visitor profile study.

However, we can add significant value to this survey by putting it in the proper context and viewing it through a wide lens that captures additional demographic, geographic and consumer-behavior patterns. This combination of perspectives – from the standpoint of existing visitors as well as from the overall adult population – will make the data more useful to all interested parties.

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[2] "Betting on a Comeback," by Candace Jackson, *Wall Street Journal*, August 2, 2008, p. W3

[3] Ibid.

Methodology

The Atlantic City Convention & Visitors Authority commissioned Spectrum Gaming Group, an independent research and professional services firm, to undertake the 2008 Visitor Profile Study to identify and explore the social, behavioral and attitudinal characteristics of typical visitors to Atlantic City and to quantify their economic value. This survey was conducted over a 12-month period beginning June 30, 2007, and ending June 30, 2008. Over the course of the 12-month period, we 3,099 interviewed visitors.

The Atlantic City Visitor Profile Study ("VPS") is an intercept survey, conducted in person during the course of actual visits to the destination. The survey quota was set at 3,000 completed interviews in order to establish a statistically significant sample and to assemble sufficient response volume to provide comparisons to the previous VPS in 2004. A total of 3,099 surveys were completed and the results are documented in this report.

By definition, an intercept survey samples the behavior, perceptions and opinions of visitors to the destination in the course of actual visitation. Intercept is an appropriate methodology for profiling visitation segments and does an excellent job in achieving both immediacy and depth in visitor responses. It is the preferred methodology in many visitor profiles in tourism destinations, from Las Vegas and Reno/Tahoe to San Diego, among many others. Intercept methodology allows this research to accurately illustrate travel segments and different types of visitors in great depth. However, by definition intercept is not the most accurate methodology for depicting true proportions of visitor types within the larger market population.

While providing results that are statistically significant, any intercept survey by definition and method cannot be entirely random. Thus, the Atlantic City VPS is most valuable for examining, contrasting and gaining better understanding of the specific characteristics of individual travel segments.

The interviewing schedule was designed to sample visitors across multiple timeframes at 21 locations throughout the city. We examined historical data from the South Jersey Transportation Authority and other sources to establish an interviewing schedule that effectively paralleled Atlantic City visitation patterns across a full 12 months. The schedule also spread interviewing sessions across a full range of days of the week and times of day.

Most interviews were conducted in the afternoons and evenings – which would likely capture both daytime and evening visits – but sampling was also conducted in the early morning and late night timeframes. Interviewing took place at an average of 8 to 10 locations every month, with locations regularly rotated to assure both variety and consistency across the course of the 12-month period.

Atlantic City has changed greatly since the last visitor profile study in 2004, most notably in regard to the creation of new retail, dining and entertainment attractions. With that in mind, the decision was made to include a larger proportion of non-gaming respondents in the 2008 study than would be expected in a representative sample of the general population, so as to provide statistically significant segment samples for analysis.

Thus by design, only a slight majority of respondents are drawn from casino locations (55%) while collection targets of 19 percent were established for the Convention/ Trade Show, Retail, Boardwalk, and Entertainment visitation segments. This methodology differs from the 2004 study, in which nearly three quarters of the interviews were conducted in casino locations.

The relative proportion of casino visitor results was then weighted to represent 80 percent of the adjusted total sample, to facilitate comparisons with previous surveys, and to ensure that the overall survey results more closely known visitation patterns. The relative proportion of day-trip visitor responses in the survey sample was similarly weighted. The percentage of day-trip visitors in the actual survey data was 46 percent, while the adjusted survey proportion for general population comparisons is 83.6 percent.

Weighting was limited to the overall survey results, and was not applied to any segment of the visitor population. As a result of the weighting, the percentages of bus, overnight and drive-in visitors are proportionate to their known visitation patterns.

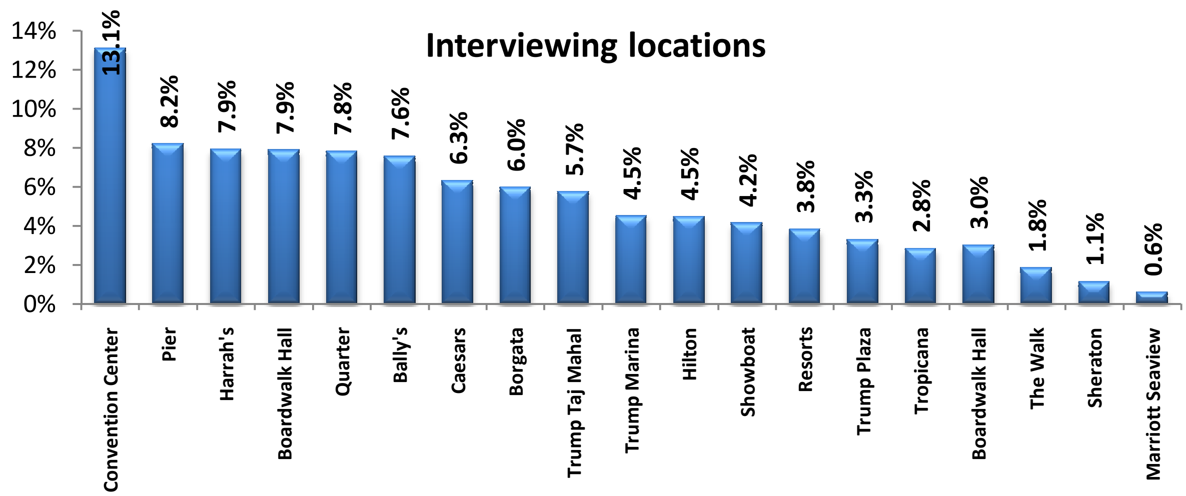
Weighting is standard in visitor profiles that seek to accurately represent the markets being studied. For example, the Las Vegas Visitor Profile 2007 noted: "The results of the Las Vegas Visitor Profile have always been weighted to more accurately reflect actual visitors to Las Vegas in terms of mode 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."[4]

The survey questionnaire was programmed into Personal Digital Assistant ("PDA") handheld devices that streamlined administration by selecting questions based on previous responses and automatically directing the interviewers to the appropriate queries. PDAs allowed for greater accuracy in the data collection as well as for more timely data tabulation. Spectrum Gaming Group held monthly update meetings with the ACCVA to review and fine-tune the survey questionnaire and schedule throughout the data collection process. Survey locations included all eleven casino properties (56.2%), three retail locations – The Walk, The Pier and The Quarter (17.9%) – two non-casino hotels (1.3%), the Boardwalk (3.0%), the Convention Center (13.7%), and Boardwalk Hall (7.9%). The proportion of survey completions by location are illustrated below.

For reference in reading this report, some common measure definitions: the "Mean" is the mathematical average of a series or range of quantitative responses. The "Median" is the frequency midpoint of a set of responses: half the values are below the median and half are above it. The "Mode" is the most frequent response in a group, or the most common answer (there can be more than one mode). Spending figures "including" or "counting" zeros reflect *all* respondents, even those to whom the category may not apply. Spending figures "excluding" or "not counting" zeros yield the results of those respondents who actually spend some amount on any given category, or only those to whom the category applies.

[4] Las Vegas Convention & Visitors Authority, 2007 Las Vegas Visitor Profile

Figure 1 – Interviewing Locations



Each visitor survey took an average of 12 to 15 minutes to administer, varying with the specific responses. Visitors who completed the survey were offered small Atlantic City-themed tokens as compensation for their time. The tokens included decks of cards, T-shirts, gum packets, luggage tags, key chains, highlighters, lip balm and scented candles.

OVERALL FINDINGS

Figure 2 – Overall Sample Profile Tables
(*Weighting casino responses to 80% of sample.)

Key numeric measures: overall sample (3,099 responses) weighted			
	Mean	**Median**	**Mode**
Age	51	52	52
No. of Annual Visits	16.6	8	12
Meals eaten	2.3	1	1
Casinos Gambled During Visit	1.9	2	1
Loyalty Cards Carried	2.9	2	2
Hours Gambling	7.3	5	5
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	17.3	8	8
Adults in Party	2.5	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	2.3	1	0
Planning Days	14.1	7	7

Overall sample: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, countin g 0	Median, not countin g 0	Mode, counting 0	Mode, not counting 0
Gambling	$416	$452	$200	$200	$200	$200
F&B	$52	$79	$25	$50	$0	$50
Shopping	$55	$149	$0	$100	$0	$100
Entertainment	$18	$141	$0	$100	$0	$100
Lodging	$11	$271	$0	$250	$0	$300
Travel	$30	$33	$10	$15	$5	$5
Total Spending	$583	$584	$331	$332	$200	$200

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Overall sample: key trip characteristics	Category	Percentage
Travel Mode	Car	70.4%
	Bus	27.6%
	Other	2.1%
Stay Overnight	Overnight Guest	16.2%
	Day Tripper	83.6%
Those Who are Traveling as Part of Package	% Yes	16.6%

Overall sample: key trip characteristics	Category	Percentage
Do You Smoke?	% Yes	23.0%
Marital Status	Married	50.8%
	Single	36.1%
Education	HS Grad of <	37.3%
	College grad or >	35.9%
Empty Nester	Children <18	22.2%
Employment	Full-Time	54.3%
	Retired	29.2%
Occupation	Professional/Tech	43.9%
Household Income	% Under $100K	81.2%
	% Over $100K	14.0%
Ethnicity	White/Caucasian	67.2%
	African American	22.7%
	Asian	5.5%
	Hispanic	4.0%
Gender	Male	36.4%
	Female	63.6%

We caution that some ethnic groups, such as Asians, may be somewhat under-represented in our survey, partly due to language and cultural barriers. This is an issue that would affect any similar survey in a resort destination that targets a variety of ethnic and cultural. In recent years, for example, we have met with representatives of the Las Vegas Convention and Visitors Authority, who have expressed similar caveats. One interesting anecdote: Visitors from some Asian nations are viewed as seriously under-represented in Las Vegas surveys, in part because some cultures look unfavorably on overseas trips that include gambling.

Overall sample: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	72.6%
	Tables	8.2%
	Both	18.1%
	Poker	0.7%
	Other	0.1%
Member of Player Loyalty Club	% Yes	80.6%
% Who Gamble Elsewhere	% Yes	34.2%

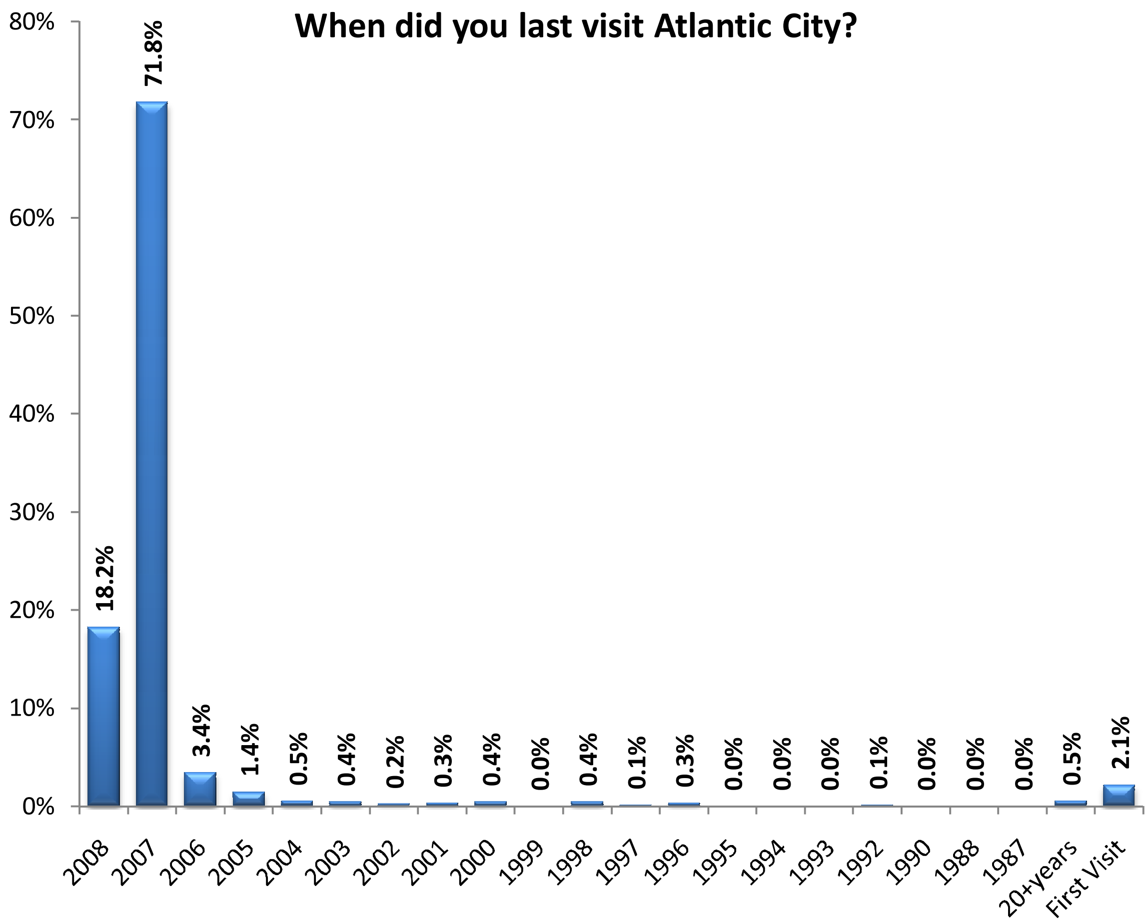
Overall sample: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.2%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.4%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	83.3%
% Likely to Revisit	Within Next 2 Yrs	92.3%
Those Who Would Recommend Atlantic City to others	% Yes	98.7%
Those who are currently visiting Atlantic City:	More Often	17.9%
	Less Often	3.7%

Trip Frequency

Half of all survey respondents visit at least eight times per year. The most frequent response to the trip frequency question is 12 times per year, which translates to monthly visitation. More than 93% of all those surveyed having been to the city within the past two years. Only 2.1% of survey respondents are first-time visitors to this destination.

Note that, in the following chart, the responses are based on calendar years. To keep that in perspective, about half the interviews were conducted in 2007 and half in 2008.

Figure 3 – Most Recent Visit Table

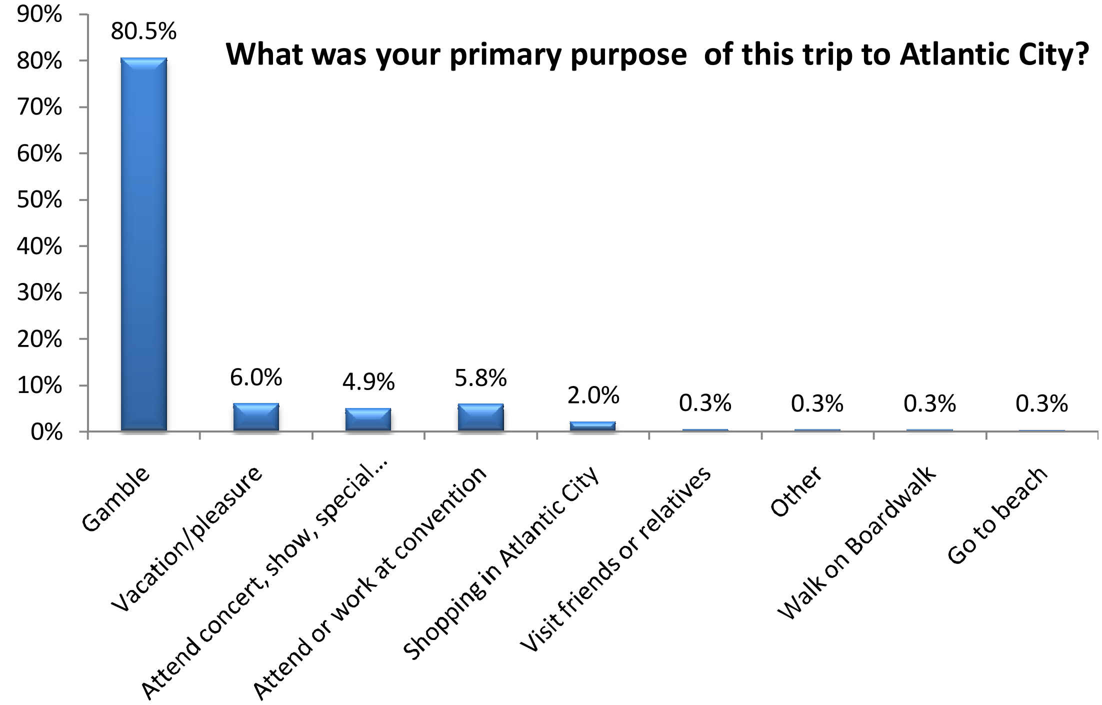


High-frequency visitation is especially true of gamblers and shoppers and less characteristic of convention attendees. The median trip frequency for the weighted survey is eight times annually, with 80% of these respondents coming to Atlantic City to gamble. Only 2.1% of survey respondents are first-time visitors, another indicator of the frequent nature of visitation to the city. (First-time visitors are profiled in the Visitor Profile section.)

Trip Purpose

The majority of visitors to Atlantic City continue to come primarily to gamble. In the 2008 survey (weighted), 80.5% of all visitors cite gambling as the primary reason for visiting the city. This proportion is somewhat lower than in the 2004 VPS, in which 85% were attracted primarily by gambling. This variance demonstrates that there are now more non-gaming options in the city. Similarly, the 2008 survey demonstrates much stronger responses in the categories of vacation/pleasure (6.0%), attending a trade show or convention (5.8%), attending an event (4.9%), and shopping (1.2%), while visiting friends or relatives (0.8%), walking on the Boardwalk (0.3%), going to the beach (0.1%), and "other" (0.4%) responses are substantially lower than observed in 2004.

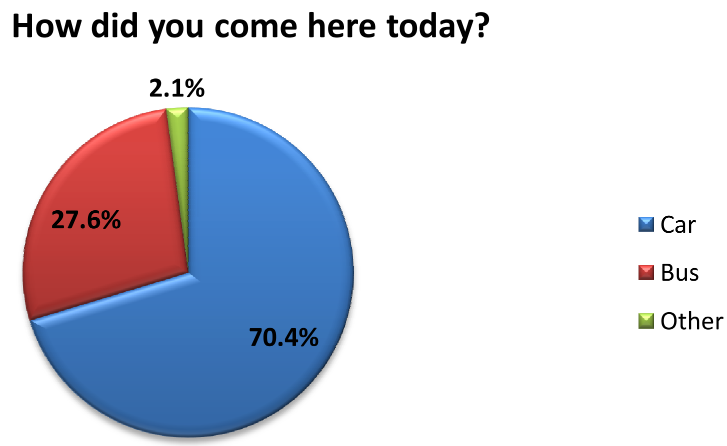
Figure 4 – Reasons for Visiting Atlantic City



Travel Mode

Atlantic City remains principally a drive-in market, and the majority of survey respondents come to the destination by car. For the full survey, more than two-thirds (70.4%) of all visitors travel by car, less than one-third (27.6%) travel by bus, and only a small number (2.1%) travel by other means, usually air or rail. Among those who come to gamble, the proportion of bus travelers increases to nearly one quarter (23.4%) of all visitors.

Figure 5 – Travel Mode

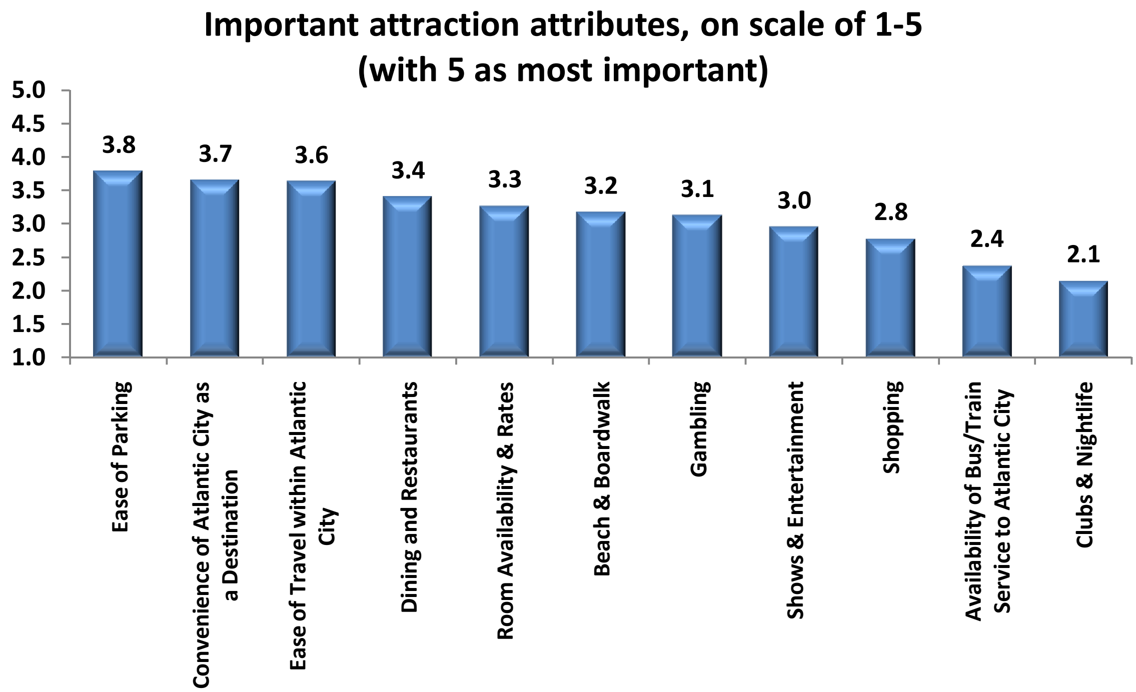


Those who did not arrive by car or bus, some 2% of all survey respondents, mostly came by air (79.6%), usually from Atlantic City International Airport, but also from Philadelphia International Airport, followed by a rental vehicle. Less than one-fifth of this minority traveled to Atlantic City by rail (17.8%). "Other" responses were miniscule at three responses (1.9%) but included biking, walking and by boat (one respondent).

Attraction Attributes

We tested a range of attraction attributes to measure relative attraction levels. We asked survey respondents, "How important were each of the following in your decision to visit Atlantic City?" and asked them to rate a battery of trip decision factors. Travel-related factors and convenience are the highest-rated attraction attributes in the survey, followed by dining and room availability. Gambling, the primary reason that most people come to Atlantic City, ranks seventh on average as an attraction attribute.

Figure 6 – Trip Decision Factor Mean Ranking



Shopping Visitors

Shopping is not often the primary reason for visiting Atlantic City but constitutes a strong secondary motivation, and is proving to be a rising satisfaction attribute. New retail attractions are a major factor cited by visitors coming to the city more frequently than they did in the past.

Visitors who characterize shopping as an important attraction attribute by rating shopping a "3" or higher on the 5-point scale, were asked where they have shopped, or intended to shop in Atlantic City. These responses should not be interpreted as favorable impressions of one location over another, and the varying responses could be influenced by a number of factors, from the location of the interview to the time of year, to the ease of access to the locations of those who were interviewed.

Figure 7 – Retail Shopping Locations

Retail Shopping Locations[5]	No. of Responses	Percent
The Walk / Atlantic City Outlets	1,257	46.5%
Casino Retail/Dining/Entertainment Center	810	30.0%
The Boardwalk	325	12.0%
In the Casinos	230	8.5%
Other Retail Locations in AC	79	2.9%
Total	2,701	100.0%

[5] Survey participants were allowed to select multiple responses.

Notably, while a minority of visitors say that they come to Atlantic City primarily to shop – and shopping ranks only in the middle on a comparative mean analysis of all the attraction attributes tested – more than 2,700 visitors, or 90 percent of all respondents, indicated an intention to shop, a finding that supports the strong secondary attraction qualities of shopping as a visitation factor.

Golfing Visitors

Similarly, visitors who characterize golfing as an important attraction attribute, rating golfing a "3" or higher on the 5-point scale, were asked where they have or intended to play golf in the Atlantic City area. The most frequently cited location for golfing was "Other" golfing locations (20.7%) usually courses near their homes and outside the Atlantic City area. They cited specific Atlantic City area courses in the following proportions: Mays Landing Country Club (17.1%), Blue Heron Pines (10.8%), Harbor Pines (10.8%), Marriott Seaview Resort (9.9%), Shore Gate (7.2%), Atlantic City Country Club (6.3%), and Sand Barrens (6.3%).

The number of golfers included in the survey is much smaller than the number of shoppers, with those listing golf as an important attraction accounting for 181 respondents, or about 5.8% of the entire survey.

Dining Visitors

Visitors who characterize dining and restaurants as an important attraction attribute, rating it a "3" or higher on the 5-point scale, were asked where they have or intended to dine in Atlantic City. For dining, the most frequent responses are casino-located dining options, such as a casino restaurant (33.8%), casino buffet (23.7%), or casino players club (10.4%).

Figure 8 – Dining Locations

Dining Locations[6]	No. of Responses	Percent
Casino Restaurant	1,320	33.8%
Casino Buffet	926	23.7%
Casino Players Club	406	10.4%
Somewhere else in Atlantic City	352	9.0%
Casino Retail/Dining/Entertainment Center	278	7.1%
In The Walk	222	5.7%
On the Boardwalk	185	4.7%
Not Sure	173	4.4%
At a Non-Casino Hotel	46	1.2%
Total	3,908	100.0%

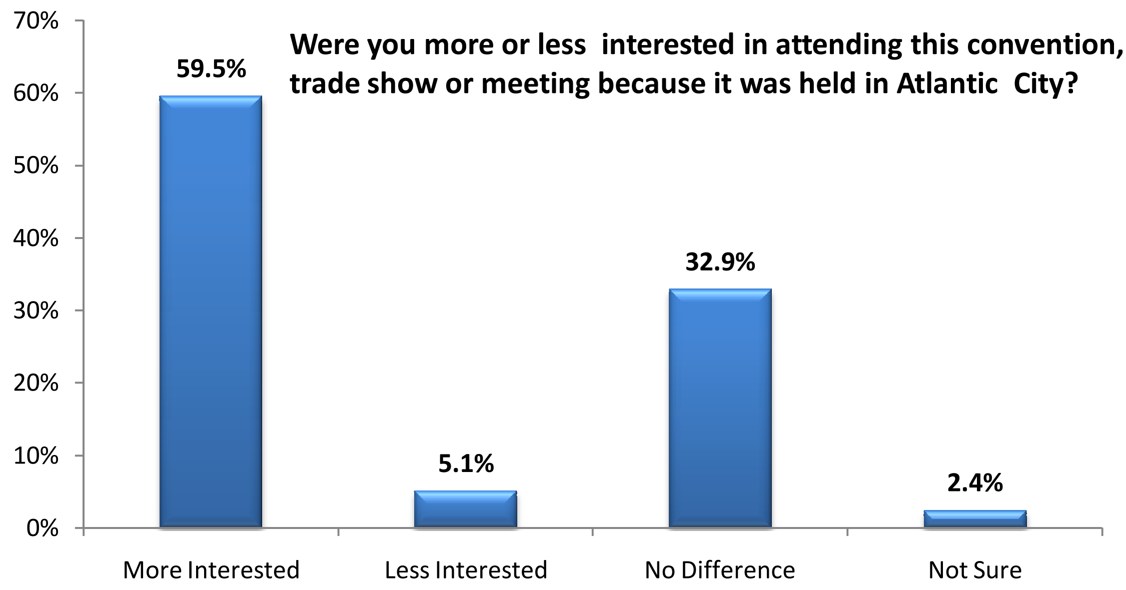
[6] Survey participants were allowed to select multiple responses.

Most visitors to the city eat a meal at some point during their trip. The average number of meals eaten during a typical stay is 2.3, median number of meals is one and the most frequent response (mode) is one.

Convention Visitors

Among convention visitors, Atlantic City is an attractive destination. Asked whether they would be more or less interested in attending a convention, trade show or business meeting because it was held in Atlantic City, a majority (59.5%) reply in the affirmative, while only 5.1% of these respondents say that they are less interested in attending because the event is held in Atlantic City. This result compares favorably with an identical question asked in the Las Vegas Visitor Profile beginning in 2006, when 48% replied in the affirmative, as well as in 2007, when 63% of respondents said that they were more interested in attending a convention, trade show, or business meeting because it was held in Las Vegas.[7]

Figure 9 – Interest in Attending a Convention, Trade Show or Business Meeting in Atlantic City



The great majority of surveyed convention visitors (90.6%) were attending a convention or trade show at the Atlantic City Convention Center. Day-trip and overnight convention visitors are compared and contrasted in the travel segments analysis found later in this report.

[7] Las Vegas Visitor Profile, Calendar Year 2007

TRIP PLANNING

The median trip-planning time for the weighted survey base is seven days and the most frequently mentioned planning interval (the mode) is likewise seven days. For gamblers, trip-planning horizons are much shorter as visits are frequently made on impulse or at the suggestion of friends or family. Shoppers also tend to display short trip planning timeframes, while conventioneers and event attendees exhibit the longest trip-planning horizons.

Figure 10 – Median Trip-Planning Days

	Weighted Survey	Gamble	Convention	Vacation / Pleasure	Event or Show	Shop
Median Planning Days	7	7	31	14	30	7

The most frequently cited sources of information for planning Atlantic City trips are friends and family (28.4%), previous experience (28.0%), casino mailings (26.5%), and the Internet (7.3%).

Figure 11 – Trip Planning Information Sources

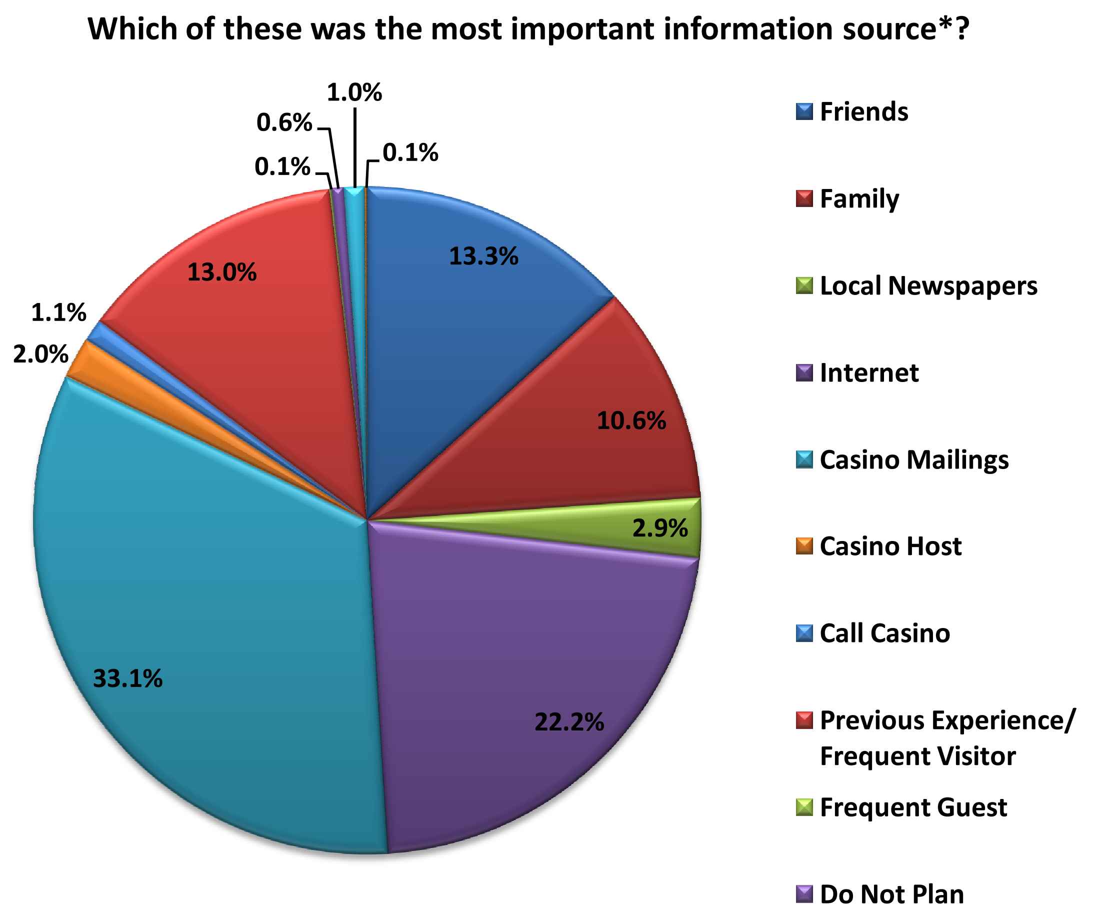
Trip Planning Information Sources[8]	No. of Responses	Percent
Friends & Family	1,258	28.4%
Previous Experience / Frequent Visitor	1,244	28.0%
Casino Mailings	1,177	26.5%
Internet	323	7.3%
Do Not Plan	98	2.2%
Casino Host	94	2.1%
Local Newspapers	92	2.1%
Other	81	1.8%
Call Casino	58	1.3%
Don't Know	12	0.3%
Total	4,437	100.0%

Because Atlantic City visitors generally come so often, previous experience and the input from friends and family are the most frequent trip planning sources mentioned. Clearly, casino mailings are a more important trip planning information sources for gamblers, while the Internet is a more important source of information for convention attendees and event attendees.

[8] Survey participants were allowed to select multiple responses.

About one-quarter (26.8%) of survey respondents listed more than one travel-planning information source and these visitors were asked which source they considered most important. In the case of multiple sources, the importance of previous experience shrinks (13.0%) and casino mailings become the most important information source (33.1%) followed by friends and family (23.9%) and the Internet (22.2%).

Figure 12 – Most Important Information Source (When more than one source is mentioned)

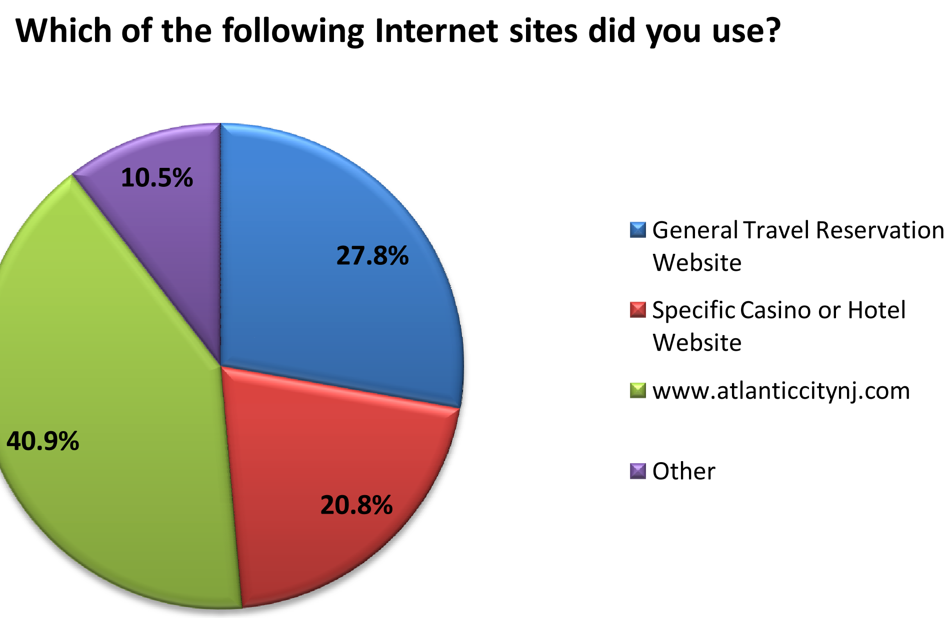


*The legend for the above pie chart begins at the top ('Friends' at 13.3%) and then moves clockwise.

Cross-tabulation shows that the Internet is most important travel planning source for convention visitors (60%), air travelers (44%), event attendees (43%) and vacation/pleasure visitors (29%), while the Internet is much less important for gamblers (8%).

Among those visitors who do use the Internet in their travel planning, some 7.3% of all survey respondents, the most popular choices are the official Atlantic City Tourism website, atlanticcitynj.com (40.9%), followed by general travel websites such as Travelocity or Expedia (27.8%), and specific casino or hotel websites (20.8%). "Other" constituted 10.5% of the responses to this question and analysis of the verbatim answers shows these are usually search engines, primarily Google, community sites such as Yahoo, and realty or timeshare websites.

Figure 13 – Internet Web Sites Used in Trip Planning



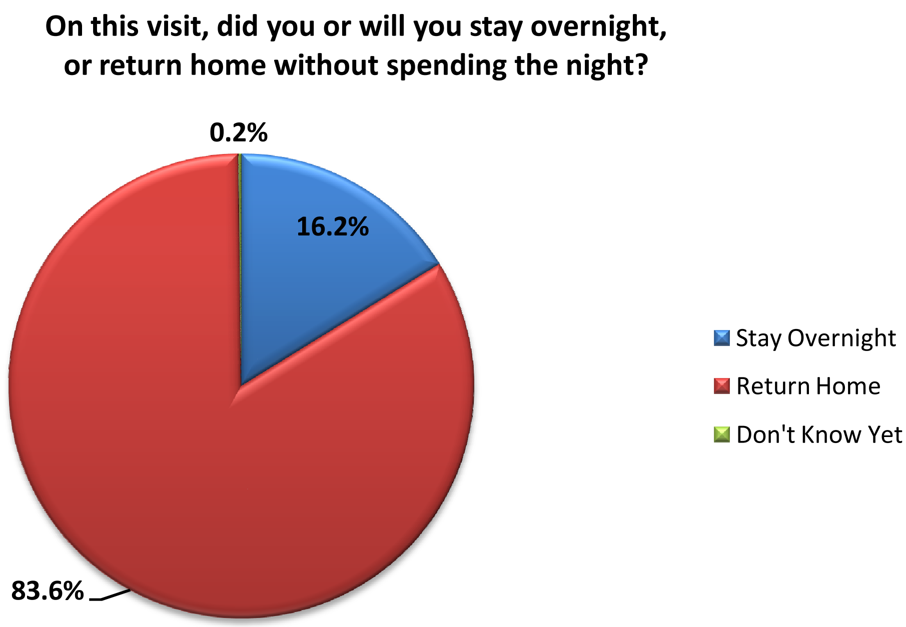
Aided awareness of the Atlantic City Tourism website is high among the larger universe of those who consider the Internet an important source of trip planning information. When asked whether they have heard of the Atlantic City Tourism website atlanticcitynj.com, 39.8% of visitors who list the Internet as an important information source respond yes.

TRIP CHARACTERISTICS

Overnight Stays

The great majority of visitors to Atlantic City remain day trippers: 83.6% of the weighted sample, vs., 16.2% overnight guests. A small fraction of visitors (0.2%) was undecided as to whether it would stay over in Atlantic City at the time they were surveyed.

Figure 14 – Overnight stays (weighted sample)



Gamblers, retail shoppers, and event attendees are the segments least likely to stay overnight; conventioneers and vacation/pleasure travelers are the most likely to sleep over in Atlantic City.

Overnight stay locations are strongly dominated by casino hotels (77.1%), reflecting both the destination room mix and the majority of casino visitors making up the Visitor Profile Study. Non-casino hotels make up only 11.1% of the total overnight locations, followed by private or rental properties (4.0%).

Most Atlantic City visitors have made overnight trips to other destinations over the past 12 months, and the median number of trips for the full sample is one overnight trip annually. Importantly, 34.2% of these visits involve gambling at other destinations.

After arriving in Atlantic City, visitors generally walk (45.7%) or drive (39.7%) to get around within the city. Only small percentages travel around town by jitney, casino shuttle or taxi. Predictably, walking is more popular during the summer months and driving is more frequent during the winter.

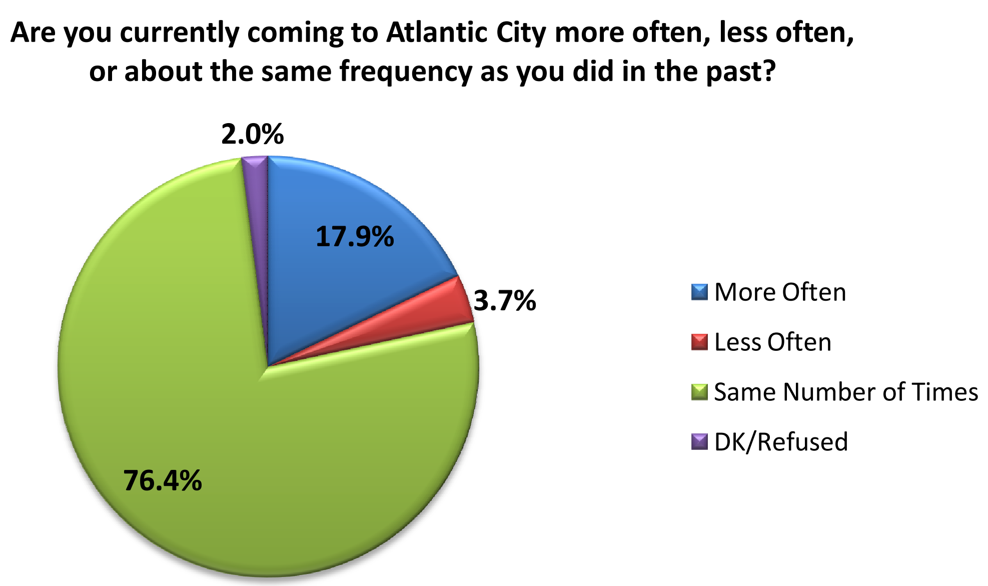
Figure 15 – Travel within Atlantic City

Travel Within Atlantic City[9]	No. of Responses	Percent
Walk	1,676	45.7%
Drive	1,455	39.7%
Jitney	233	6.4%
Casino Shuttle	166	4.5%
Taxi	102	2.8%
NJ Transit Bus	11	0.3%
Other	22	0.6%
Total	3,665	100.0%

Visitation Trends

All survey respondents were asked if they are now visiting Atlantic City more often, less often, or at about the same frequency that they did in the past. The great majority of visitors (76.4%) are coming just as frequently. A substantial minority, almost one-fifth (17.9%), say that they are currently coming to Atlantic City more frequently. Only a small proportion (3.7%) says that they are coming to Atlantic City less frequently than they once did, and a similarly small proportion (2.0%) is unsure about whether their visitation trend has changed.

Figure 16 – Visitation Trends



[9] Survey participants were allowed to select multiple responses.

Looking into the reasons why visitors are coming more and less frequently is revealing. The most frequently cited reasons for visiting Atlantic City more often are strongly correlated with new attractions (19.5%) and more things to do in general (28.4%). Specifically mentioned were new or better attractions include new shopping, casino, and dining attractions as well as better nightlife and entertainment. Other reasons include more available time (18.6%), more money (5.7%), simple personal enjoyment (5.0%), and better comps (4.4%). Both more frequent and less frequent visitors are explored in greater depth in the segmentation analysis found later in this report.

Figure 17 – Reasons for Coming to Atlantic City More Often

Coming to Atlantic City More Often[10]	No. of Responses	Percent
More Things To Do	244	28.4%
New/Better Attractions (Net)	167	19.5%
New Shopping Attractions	78	9.1%
New Casino Attractions	43	5.0%
New Dining Attractions	23	2.7%
Better Nightlife and Entertainment	23	2.7%
More Time	160	18.6%
More Money	49	5.7%
Personal Enjoyment	43	5.0%
Better Comps	38	4.4%
Other	35	4.1%
Come with Friends	26	3.0%
Positive Previous Experience	17	2.0%
Moved Closer	16	1.9%
Availability of Rooms	16	1.9%
Travel Easier Now	15	1.7%
See the Sights	13	1.5%
Now Retired	10	1.2%
See Family	9	1.0%
Total	858	100.0%

The reasons cited by those coming less frequently are also revealing, led by less time (20.8%), less money (18.3%), and moving farther away (9.2%). Going other places represents almost one-tenth of the response (9.2%) in this segment and is indicative of the wider availability of gaming in the regional market. Importantly, the top four reasons for visiting Atlantic City less frequently, constituting 60% of all responses, are subjective factors beyond the control of Atlantic City to change.

[10] Survey participants were allowed to select multiple responses.

Similarly, a small minority (5.8%) says that travel is more difficult now, which may be an indication of the higher cost of gasoline. Similarly small proportions (5.8% respectively) claim that there are currently fewer things to do or that they are currently receiving worse comps to account for reduced visitation. Importantly, almost one in 10 respondents among this minority say that they are now going other places (9.2%). This is slightly lower than the 11% forecast in the 2004 VPS, which is understandable since it can be assumed that visitors now coming less frequently would be less likely to be intercepted by the survey interviewers.

Figure 18 – Reasons for Coming to Atlantic City Less Often

Coming to Atlantic City Less Often[11]	No. of Responses	Percent
Less Time	25	20.8%
Less Money	22	18.3%
Moved Farther Away	11	9.2%
Going Other Places	11	9.2%
Other	8	6.7%
Fewer Things To Do	7	5.8%
Worse Comps	7	5.8%
Travel More Difficult Now	7	5.8%
Work	5	4.2%
No New Attractions	4	3.3%
No Personal Enjoyment	4	3.3%
Un-Availability of Rooms	3	2.5%
Negative Previous Experience	3	2.5%
Friends not Available to Travel With	3	2.5%
Total	120	100.0%

[11] Survey participants were allowed to select multiple responses.

TRIP SPENDING

Atlantic City visitors' median trip spending amount is $331, while the most common (mode) trip bankroll is $200. In comparison to the 2004 Visitor Profile Study, median trip bankroll was also $200.

Figure 19 – Median Trip Spending by Trip Purpose Segment

Median* Bankroll	Gamble	Conv.	Vac./ Pl.	Event	Shop
Gambling	$400	$50	$200	$100	$20
Food & Beverage	$20	$100	$100	$60	$50
Shopping	$0	$50	$200	$0	$175
Entertainment	$0	$0	$100	$100	$0
Lodging	$0	$300	$269	$0	$0
Travel (excluding gas)	$15	$12	$25	$10	$8
Total Spending	$550	$380	$623	$382	$310

*Median calculated including zero amounts.

Figure 20 – Mean Trip Spending by Trip Purpose Segment

Mean* Bankroll	Gamble	Conv.	Vac./ Pl.	Event	Shop
Gambling	$453	$144	$404	$272	$107
Food & Beverage	$38	$137	$123	$95	$60
Shopping	$40	$65	$115	$52	$198
Entertainment	$5	$17	$36	$122	$14
Lodging	$2	$69	$32	$20	$2
Travel (excluding gas)	$10	$47	$72	$35	$8
Total Spending	$569	$540	$506	$624	$305

*Mean calculated including zero amounts.

Median* Bankroll	Trip Frequency	Gambling	F&B	Shopping	Entertainment	Lodging	Travel	Total Spending
Gamblers	12	$400	$20	$0	$0	$0	$15	$505
Convention Attendee	3	$50	$100	$50	$0	$300	$12	$380
General Tourist Vac./ Pl.	4	$200	$100	$200	$100	$269	$25	$623
Event Attendee	4	$100	$60	$0	$100	$0	$10	$382
Retail Shopper	6	$20	$50	$175	$0	$0	$8	$310
Overnight Guest	6	$400	$80	$50	$0	$0	$20	$755
Day Tripper	10	$150	$25	$0	$0	$0	$10	$262
Come More Often	6	$200	$30	$0	$0	$0	$18	$467
Come Less Often	6	$100	$50	$0	$0	$0	$30	$614
First Time Visitor	1	$100	$100	$50	$0	$0	$30	$614
Travel by Car	8	$200	$50	$0	$0	$0	$10	$503
Travel by Bus	12	$200	$25	$0	$0	$0	$28	$341
Travel by Other	2	$400	$150	$100	$0	$0	$199	$1,150
Package Purchaser	10	$500	$50	$0	$0	$0	$20	$1,004
Slot Player	12	$300	$25	$0	$0	$0	$15	$430
Table Player	10	$500	$50	$50	$0	$0	$19	$787
Both Tables & Slots	12	$500	$38	$0	$0	$0	$16	$831
Smoker	8	$250	$40	$0	$0	$0	$11	$468
Non-Smoker	8	$200	$40	$0	$0	$0	$15	$500

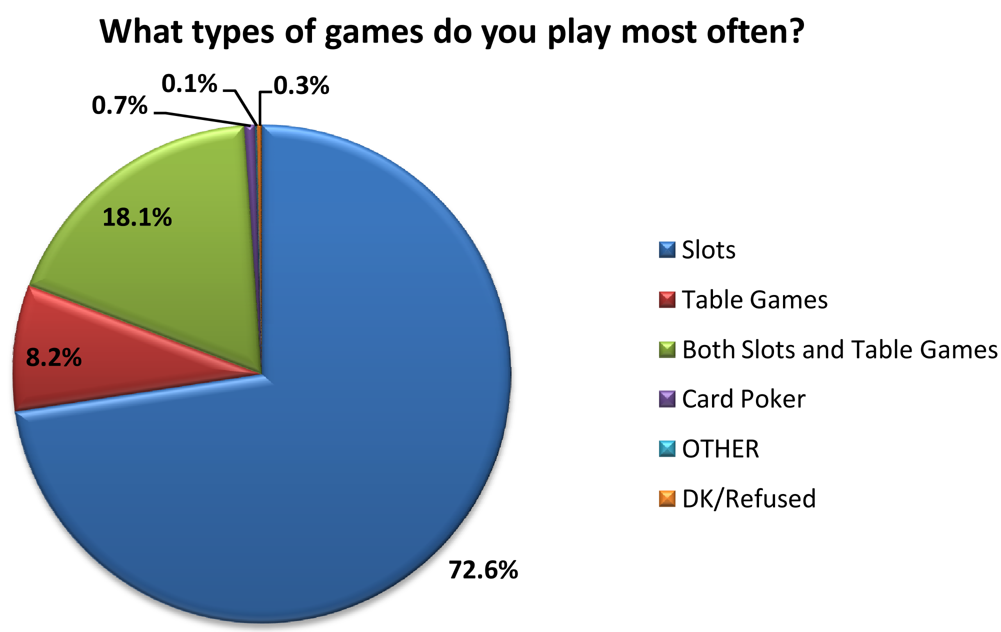
*Median calculated including zero amounts.

GAMING BEHAVIOR

Visitors who travel to Atlantic City primarily to gamble make up the majority of survey responses. However, even visitors who came for a different reason may intend to gamble during a trip, as a strong majority (72.5%) of all survey respondents belong to a casino player club or possesses casino player cards. Among this majority who belong to the casino loyalty programs, half carry at least two player cards.

More than two-thirds (72.6%) of gaming visitors play slot machines exclusively, and less than one-tenth (8.2%) play table games exclusively; most of the remainder (18.1%) play both slots and table games. Some 0.7% characterize themselves as poker players and a tiny minority says they play other games such as keno or bet on horse races.

Figure 21 – Casino Game Type Played



Casino Visitation

Visitors who characterize gambling as an important attraction attribute, rating gambling a "3" or higher on the 5-point scale, were asked about their typical visitation patterns.

Gamblers rarely restrict themselves to playing in a single casino and most visit at least two properties during their stay. The time that they spend gambling also makes up a substantial portion of their total trip, with a median time of six hours gambling and a most frequent response of five hours. Gambling budgets are also substantial, with a median bankroll of $300 and a most frequent bankroll of $200.

Atlantic City visitors also visit other gambling destinations, chiefly casinos in Las Vegas/Nevada (30.5%), Pennsylvania (19.7%), Connecticut (15.4%), New York (8.2%), and Delaware (7.8%).

Figure 22 – Alternate Gambling Destinations

Alternate Gambling Destinations[12]	No. of Responses	Percent
Las Vegas or Other Nevada Casinos	681	30.5%
Pennsylvania	440	19.7%
Connecticut	344	15.4%
New York	183	8.2%
Delaware	175	7.8%
Riverboat or Midwestern Casinos	108	4.8%
Caribbean Casinos	88	3.9%
Native American Casinos	66	3.0%
Cruise Ships	65	2.9%
Other Casino Locations	60	2.7%
Casinos in Canada or Detroit	14	0.6%
Internet or Online Casinos	9	0.4%
Asian Casinos	2	0.1%
Total	2,235	100.0%

Comp and Discount Offers

All visitors were asked whether they had any complimentary or discount offers that they would use during this trip and all responses were recorded. Results show that almost one-quarter of the full sample had no comp or discount offers (24.4%) and another 2% were not sure yet whether they would qualify for one. Among those in the full survey receiving some type of offer, the most frequent responses are free room (20.9%), free meal (18.3%), bonus cash (8.2%), free gift (6.7%), discount meal (5.3%), free or discount show tickets (4.4%), or multiple points offer (2.8%). A complete list of the distribution of comp and discount offers is documented below.

[12] Survey participants were allowed to select multiple responses.

Figure 23 – Comp or Discount Offers

Comp or Discount Offers	No. of Responses	Percent
None	1,224	24.4%
Free (Comp) Room	1,048	20.9%
Free (Comp) Meal	920	18.3%
Bonus Cash / Cash Offer	412	8.2%
Free Gift	336	6.7%
Discount Meal	268	5.3%
Free or Discount Entertainment / Show Tickets	223	4.4%
Multiple Points Offer	139	2.8%
Not Sure / Don't Know Yet	93	1.9%
Discount Room	60	1.2%
Sweepstakes Drawing	61	1.2%
Room Package	52	1.0%
Party or Special Event	41	0.8%
Golf Package	37	0.7%
Gaming Tournament	31	0.6%
Discount Convention/Trade Show Admission	32	0.6%
Retail/Shopping Discount	30	0.6%
Other	17	0.3%
Total	5,024	100.0%

Among only those who say they visit Atlantic City to gamble, the incidence of comp or discount offers increases as the number of those visitors who report no offers falls by half (12.1%) but the relative proportions of such offers remains generally constant.

[13] Survey participants were allowed to select multiple responses.

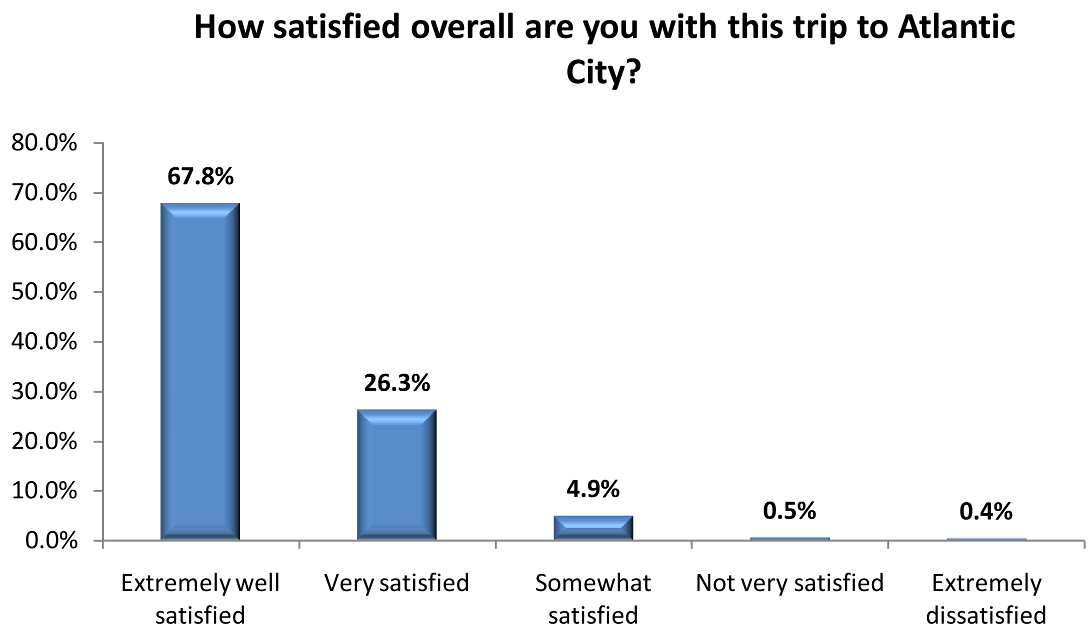
Figure 24 – Comp or Discount Offers (gamblers only)

	No. of Responses	Percent
Free (Comp) Room	796	24.5%
Free (Comp) Meal	713	21.9%
None	393	12.1%
Bonus Cash / Cash Offer	324	10.0%
Free Gift	290	8.9%
Discount Meal	200	6.1%
Free or Discount Entertainment / Show Tickets	169	5.2%
Multiple Points Offer	105	3.2%
Sweepstakes Drawing	52	1.6%
Not Sure / Don't Know Yet	47	1.4%
Room Package	35	1.1%
Discount Room	30	0.9%
Gaming Tournament	23	0.7%
Retail/Shopping Discount	19	0.6%
Golf Package	18	0.6%
Party or Special Event	17	0.5%
Discount Convention / Trade Show Admission	17	0.5%
Other	6	0.2%
Total	3,254	100.0%

VISITOR SATISFACTION

The great majority of Atlantic City visitors display high satisfaction with their most recent visit. A very strong majority (94.2%) rates their level of satisfaction in the two top scores on a 5-point scale and the majority of all responses (67.8%) fall in the "Extremely Well Satisfied" category.

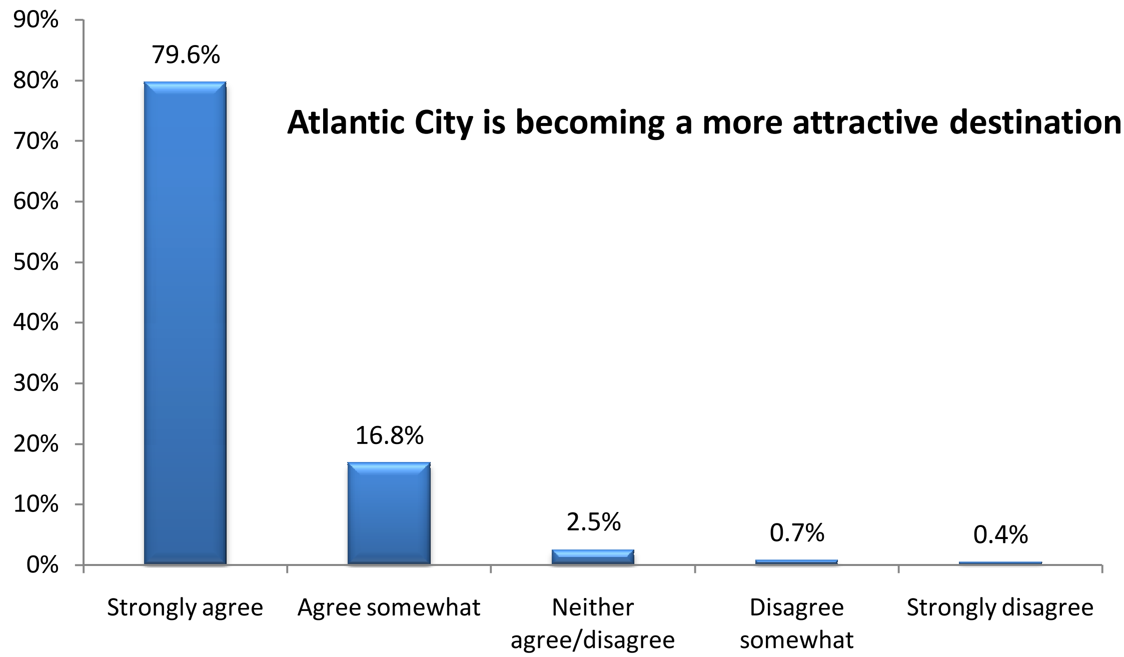
Figure 25 – Overall Satisfaction with Atlantic City



This high level of overall satisfaction compares favorably to similar measurements from other gambling destinations such as Las Vegas, where visitor who are "Very Satisfied" with their visit was measured (although on a 4-point scale) at 89% in the 2007 survey, and at levels between 93% and 96% since 2003.

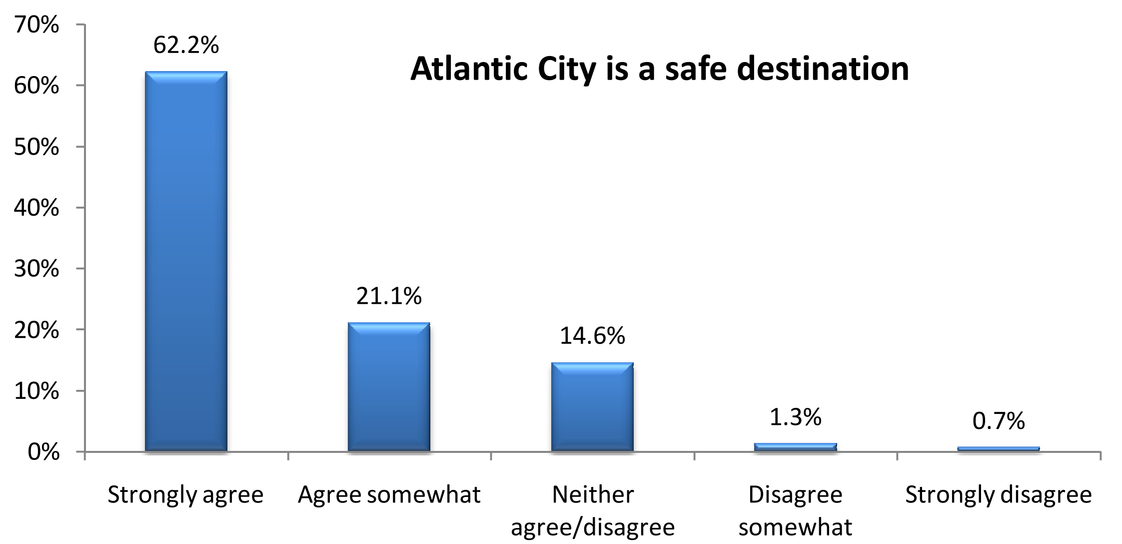
This high level of satisfaction is also reflected in other attitudinal benchmark measurements incorporated into the 2008 Atlantic City VPS. For instance, all Atlantic City visitors surveyed were asked how strongly they agreed with the statement "Atlantic City is becoming a more attractive destination." More than three-quarters of all respondents (79.6%) strongly agree with this statement and almost another one-fifth (16.8%) agree somewhat for a two top box score of 96.4% positive response.

Figure 26 – Perception of Atlantic City as More Attractive



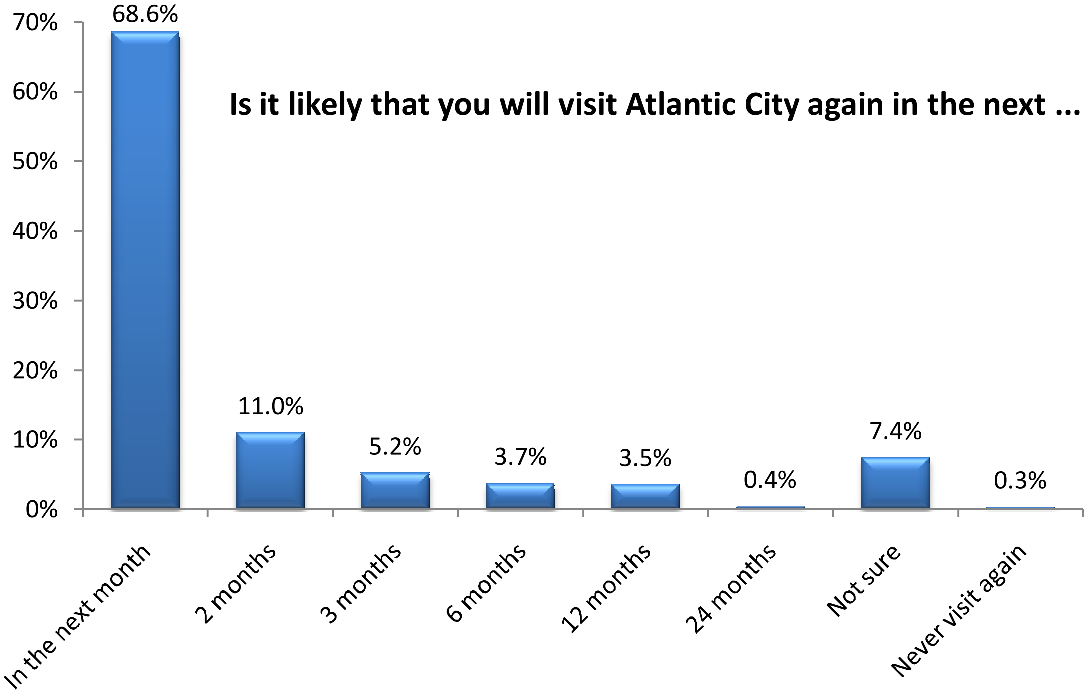
A similar attitudinal question, "Atlantic City is a safe destination" was also asked of all visitors. Here slightly less than two-thirds (62.2%) strongly agree with the statement and another one-fifth (21.1%) agree somewhat for a positive response of 83.3%.

Figure 27 – Perception of Atlantic City as a safe destination



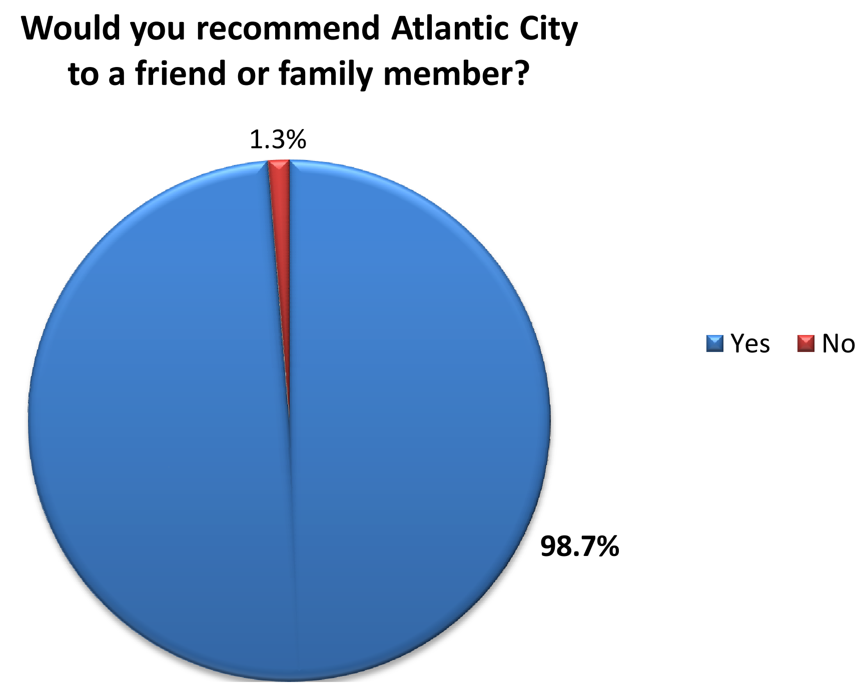
The above attitudinal measurements were followed by a question gauging Atlantic City repeat visitation. Not surprising given the frequency of visitation, more than two-thirds of all respondents in the weighted sample (68.6%) intend to return to the destination within the next month and a further one-fifth (23.4%) intend to return within the next year. While less than one-tenth (7.4%) are unsure if or when they may return to Atlantic City, only a tiny minority (0.3%, or a total of eight visitors out of 3,099) say that they will never visit Atlantic City again.

Figure 28 – Repeat Visitation to Atlantic City



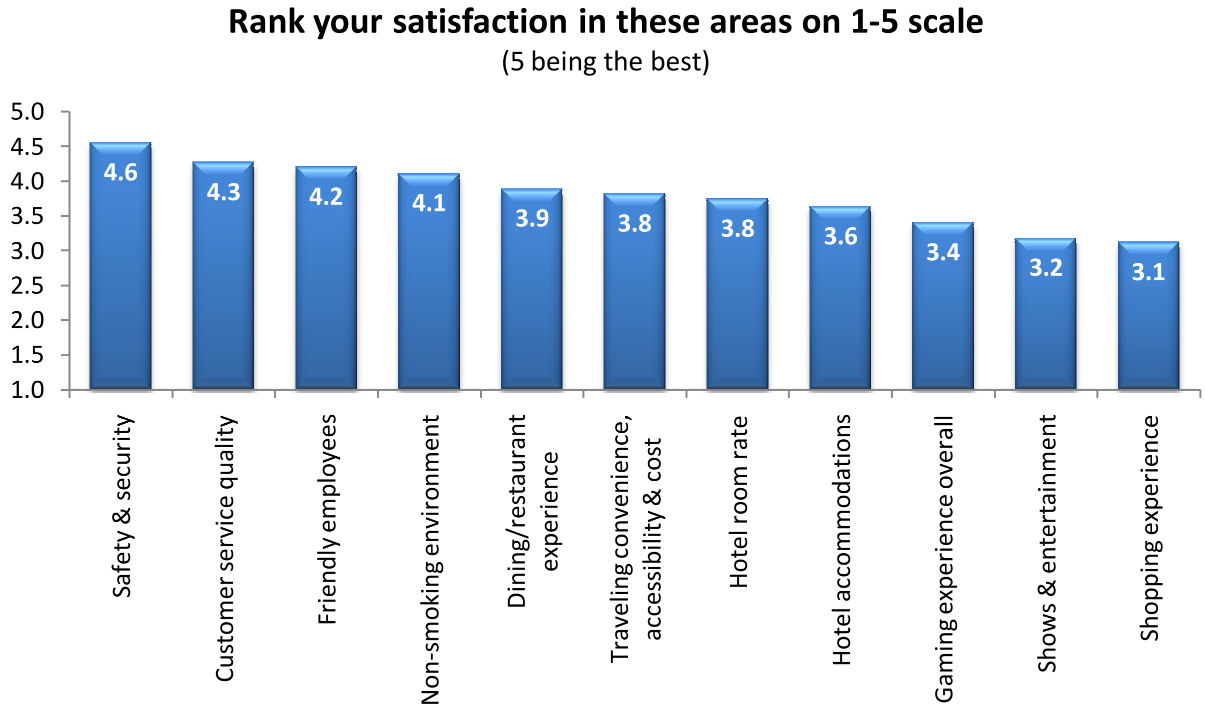
In keeping with these positive findings in regard to trip satisfaction, the overwhelming majority of those surveyed (98.7%) indicate that they would recommend Atlantic City to a friend or family member.

Figure 29 – Recommend Atlantic City to Friends or Family



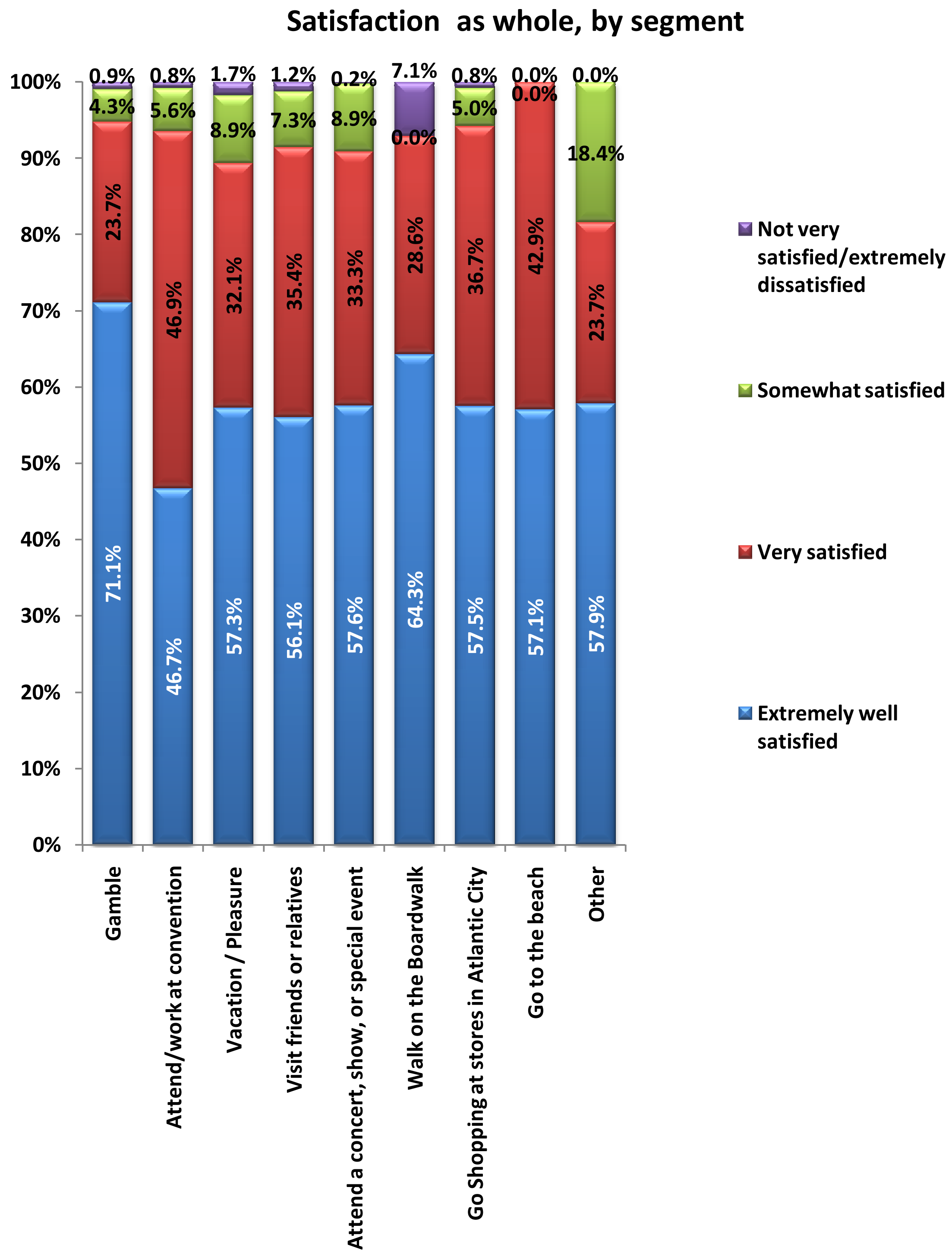
Respondents were also asked about influential attributes related to satisfaction with their trip to Atlantic City. Safety and security tops the list in a mean score ranking analysis (4.56 out of a possible 5.00), followed by the service attributes of Customer Service Quality (4.27) and Friendly Employees (4.21). The fourth-highest mean ranking is for a non-smoking environment (4.11), while the fifth-highest mean score is posted by the dining or restaurant experience (3.89). Further down the mean score rankings are travel convenience (3.82) and hotel room rates and accommodations (3.75 and 3.64, respectively). Toward the bottom of the list are found attributes focusing on Atlantic City's signature offerings of gaming experience (3.41), shows and entertainment (3.12), and the convention or trade show experience (2.14).

Figure 30 – Satisfaction Attributes Mean Score Ranking



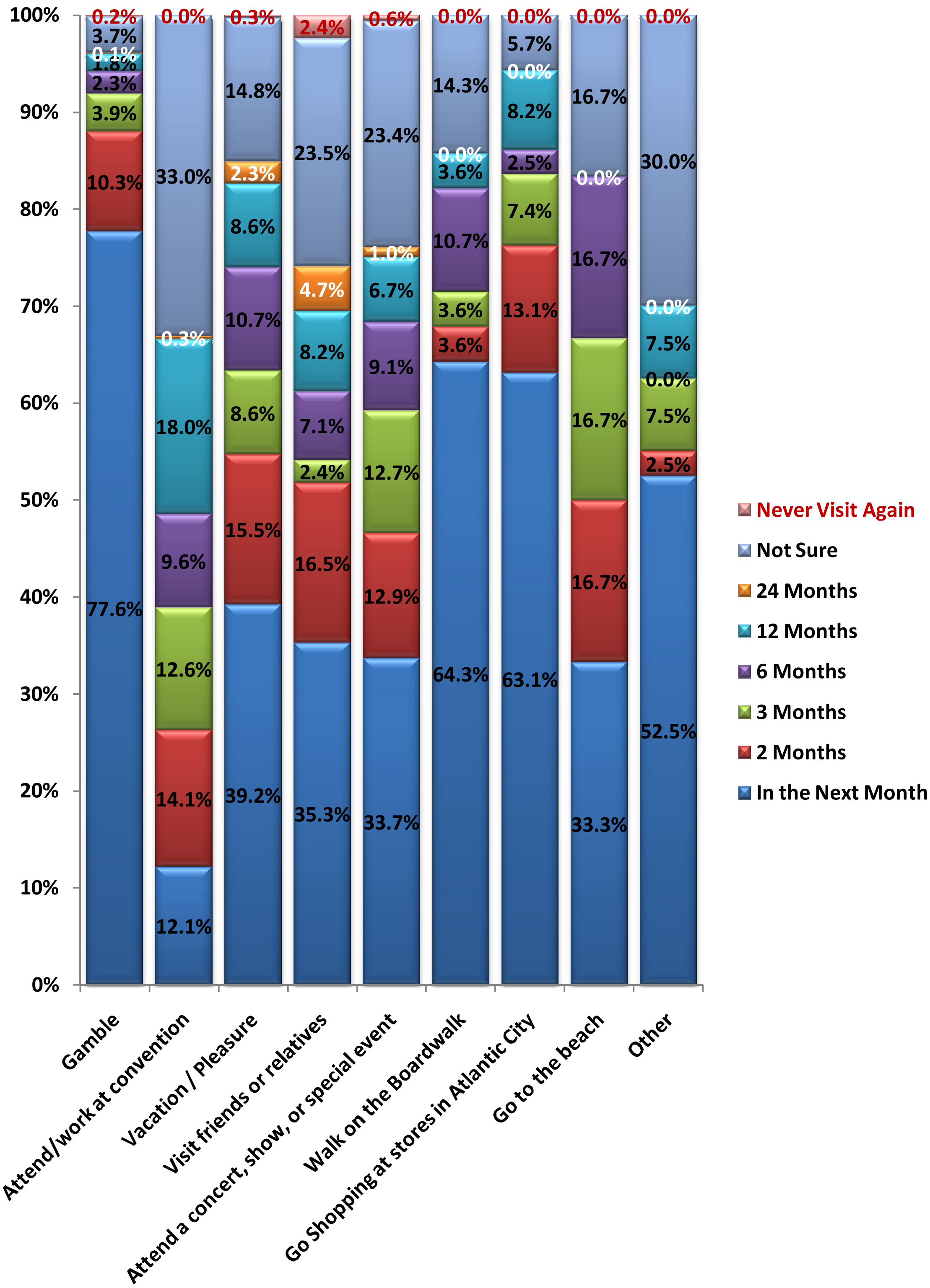
Looking at visitor satisfaction by behavioral segments, we find that gamblers are the segment displaying the highest level of satisfaction with Atlantic City visit.

Figure 31 – Satisfaction with Atlantic City by Trip Purpose Chart



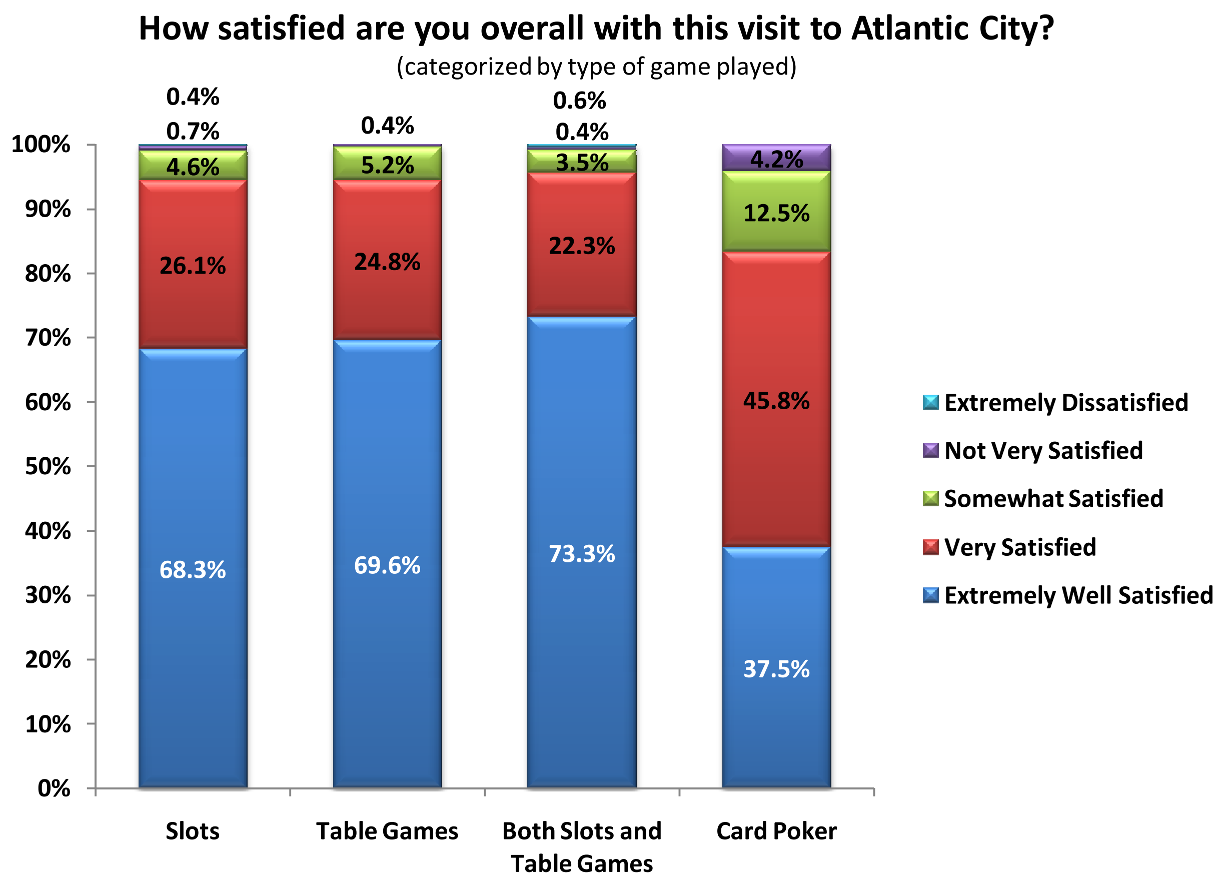
Gamblers exhibit the strongest intent to return to Atlantic City in the near future, followed closely by shoppers and Boardwalk strollers and more distantly by vacationers and pleasure visitors. Those least likely to know when they might return to Atlantic City are conventioneers and event attendees.

Figure 32 – Atlantic City Repeat Visitation by Primary Trip Purpose Chart



Gamblers who play both slots and tables are somewhat more satisfied than exclusively table game and slot players, while poker players are the least satisfied type of play segment.

Figure 33 – Atlantic City Satisfaction by Casino Game Type Played



Overnight guests are significantly more satisfied with their visit than day trip visitors. While this finding may have much to do with the higher level of amenities offered to overnight guests, it is a positive sign for hotel developers that overnight guests display the highest satisfaction levels.

ZIP CODE AND POPULATION ANALYSIS

A total of 3,043 survey respondents reported from 1,448 US ZIP Code locations. Among these, the highest frequency from one ZIP Code was 25, in Manchester Township, Ocean County, NJ. This and 31 other ZIP Codes had 10 or more respondents, all from New Jersey, Maryland, New York, or Pennsylvania, totaling 447 respondents, or 14.4% of the total reported. In addition to these, response frequencies were as follow, by decreasing density:

32 zip codes x average 14	= 447 responses	= 14.4% of total
11 zip codes x 9	= 99 responses	= 3.3% of total
9 zip codes x 8	= 72 responses	= 2.4% of total
15 zip codes x 7	= 105 responses	= 3.5% of total
26 zip codes x 6	= 156 responses	= 5.1% of total
38 zip codes x 5	= 190 responses	= 6.2% of total
57 zip codes x 4	= 228 responses	= 7.5% of total
125 zip codes x 3	= 375 responses	= 12.3 % of total
236 zip codes x 2	= 472 responses	= 15.5% of total
899 zip codes x 1	= 899 responses	= 29.5%
1,448 total zip codes x average 2.1 respondents.		

The dispersion of reported locations spanned Hawaii to Maine to Puerto Rico. Frequencies of ZIP Code locations are illustrated in the following three maps, starting with North America, to the northeastern US, to the mid-Atlantic region:

Figure 34 - US national ZIP Code locations

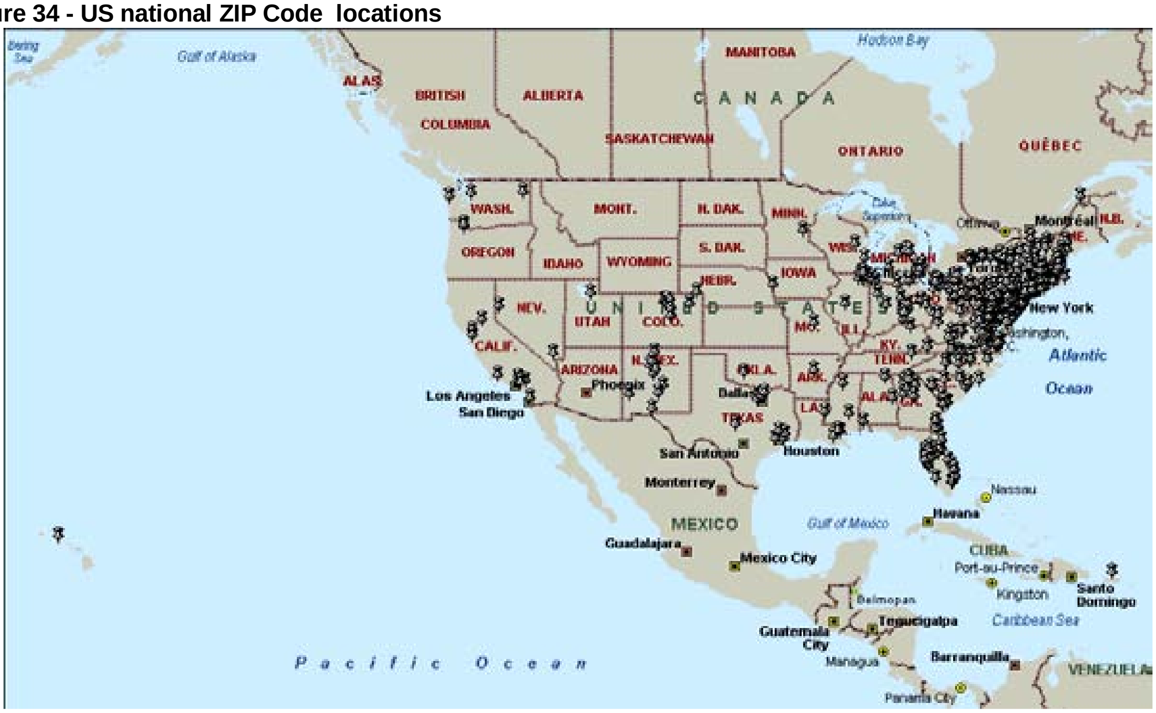


Figure 35 - Northeastern US ZIP Code locations

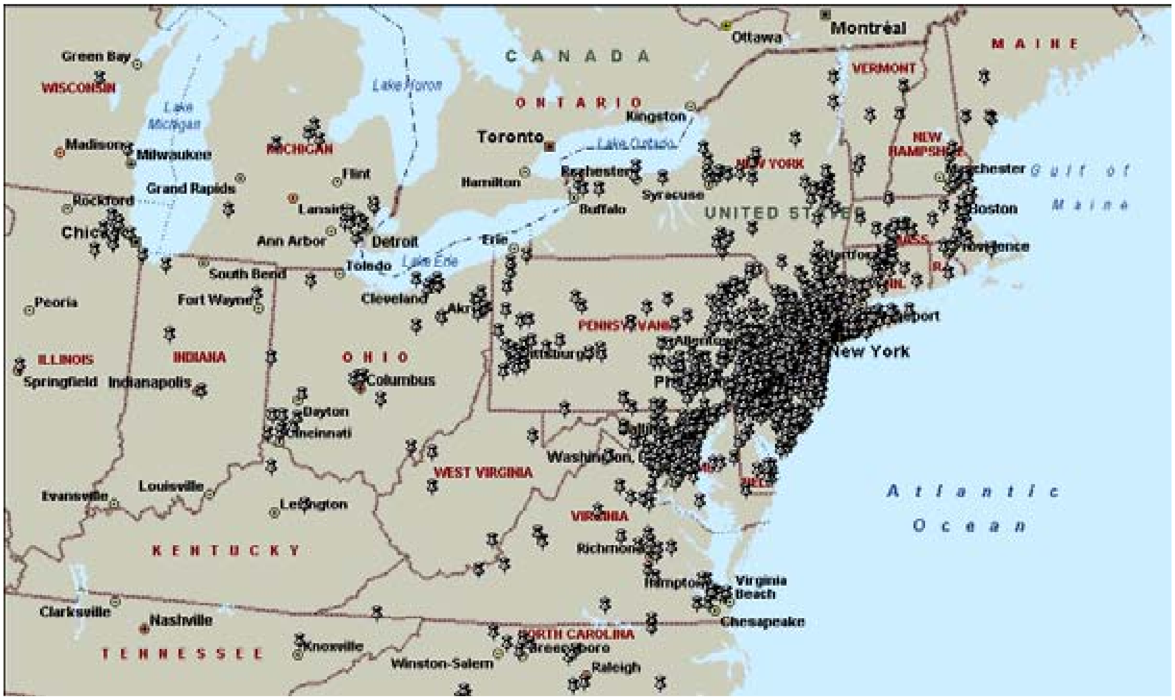
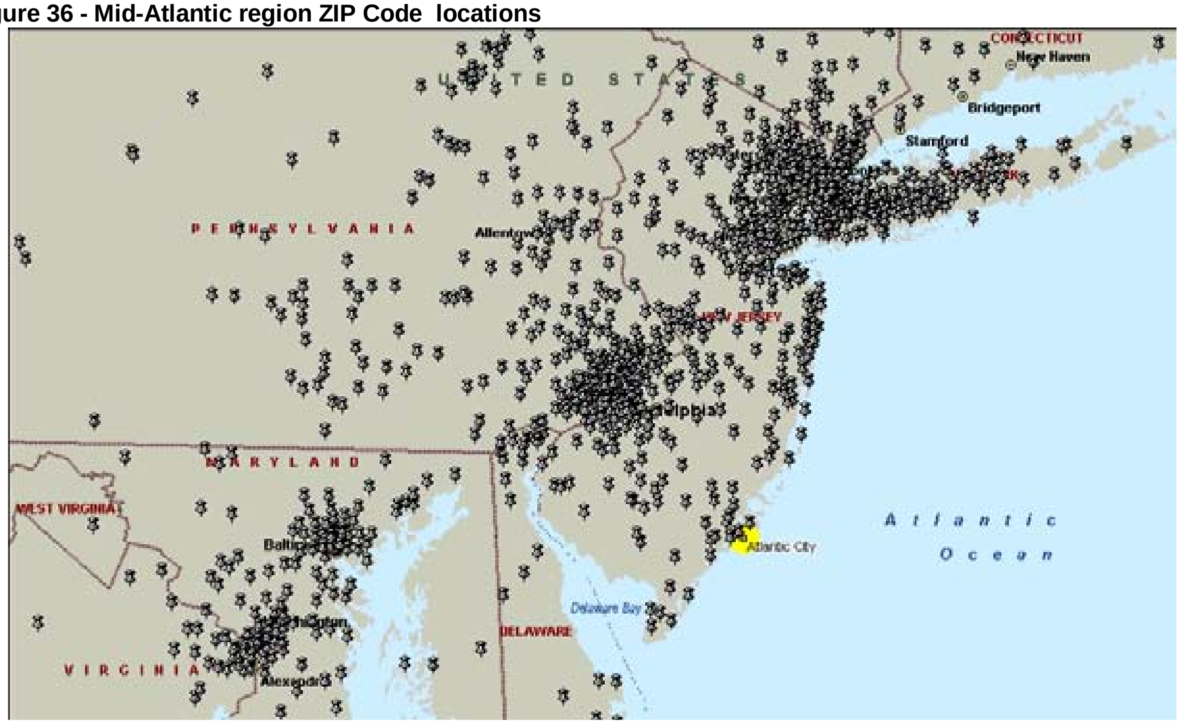
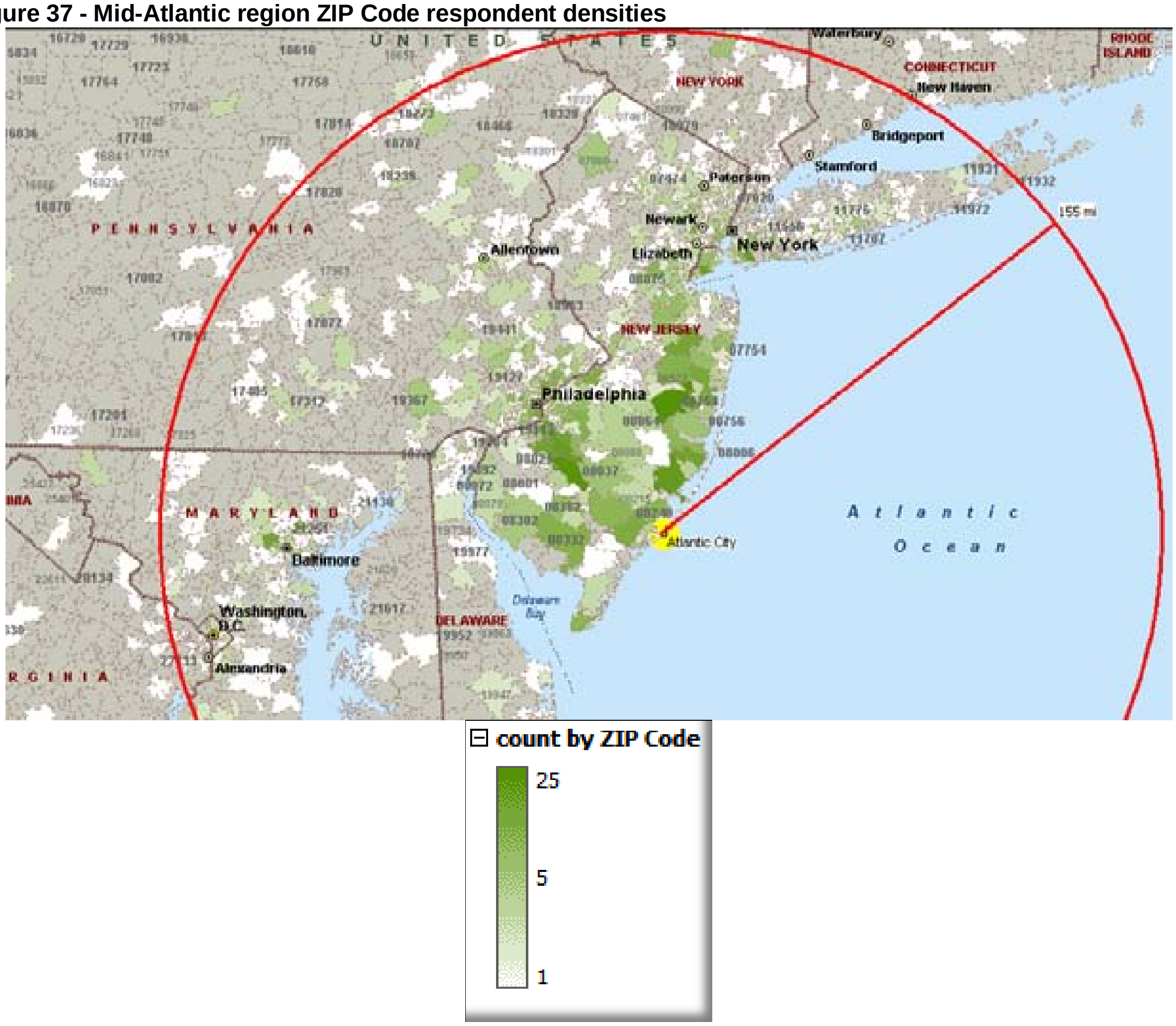


Figure 36 - Mid-Atlantic region ZIP Code locations



Next, the following map[14] illustrates the frequency of responses, or density, within ZIP Codes in the Mid-Atlantic region. White locations show one or two respondents per ZIP Code, light green shows about three to five, and darker shades reflect up to the 25-respondent maximum. (Gray areas represent no survey respondents.)

Figure 37 - Mid-Atlantic region ZIP Code respondent densities



The red radius lines indicates the area within 155 miles of Atlantic City. As this map illustrates, essentially all ZIP Codes with more than about five respondents lie within this area, which equates roughly to a three-hour or less drive distance from Atlantic City. This region is one of the largest population centers in the country, home to about 30 million people (per US Census Bureau 2006 estimates).

The top 32 survey count ZIP Codes were as follows:

[14] All Maps produced using Microsoft MapPoint 2006 software.

Figure 38 – Top 32 (10 or more respondents) Survey ZIP Codes

Zip code	Count	City, State	County
08759	25	Manchester Township, NJ	Ocean
08094	23	Williamstown, NJ	Gloucester
08087	19	Tuckerton, NJ	Ocean
08012	18	Blackwood, NJ	Camden
08081	18	Sicklerville, NJ	Camden
11234	18	Brooklyn, NY	Kings
08031	17	Bellmawr, NJ	Camden
08757	16	Toms River, NJ	Ocean
10312	16	Staten Island, NY	Richmond
08021	15	Clementon, NJ	Camden
08050	15	Manahawkin, NJ	Ocean
08080	15	Sewell, NJ	Gloucester
07728	14	Freehold, NJ	Monmouth
21207	14	Gwynn Oak, MD	Baltimore
21215	14	Baltimore, MD	Baltimore City
07111	13	Irvington, NJ	Essex
08701	13	Lakewood, NJ	Ocean
19148	13	Philadelphia, PA	Philadelphia
19151	13	Philadelphia, PA	Philadelphia
08753	12	Toms River, NJ	Ocean
19120	12	Philadelphia, PA	Philadelphia
08016	11	Burlington, NJ	Burlington
08096	11	Deptford, NJ	Gloucester
08234	11	Egg Harbor Township, NJ	Atlantic
11230	11	Brooklyn, NY	Kings
08053	10	Marlton, NJ	Burlington
08332	10	Millville, NJ	Cumberland
08527	10	Jackson, NJ	Ocean
11212	10	Brooklyn, NY	Kings
11225	10	Brooklyn, NY	Kings
19145	10	Philadelphia, PA	Philadelphia
19149	10	Philadelphia, PA	Philadelphia

Of equal or greater interest is the regional source population from which these respondents were drawn. The following map defines an approximate three-hour drive-time perimeter from Atlantic City, representing the base population from which the resort draws virtually all of its day-trip, as well as many overnight, visitors.

Figure 39 – Three-hour Drive-time Model for Atlantic City

This perimeter (in **BLUE**) encompassed most or all of 61 counties or major cities with an adult (21 and over) population of about 23.5 million residents, per Census Bureau 2007 estimates. These county figures are detailed in the appendix.

For discussion here, consider the total 23.5 million adults in this region relative to Atlantic City's visitor profile. According to the South Jersey Transportation Authority, 33.3 million visitor trips were made to the city last year.[15] Setting aside air travel, that total is 33.1 million. Given the survey median eight trips annually, this suggests Atlantic City is drawing on a regular visitor base of about 4.1 million people. That translates to penetration of the potential adult market of about 17.6 percent.

It is common in most gaming markets that frequency of visitation moves inversely with the distance traveled. We consider the 17.6 percent to be a conservative estimate, with a potential penetration rate of between 17 and 27 percent. Notwithstanding the resort's already substantial visitation numbers, we suggest that this range indicates significant growth potential yet to be realized, given a continued and improving mix of offerings. We also point out that the potential market can be tapped in various ways, including increasing the number of adults who visit Atlantic City, as well as by increasing the frequency of their visits. Both present opportunities in various segments, according to our study.

[15] South Jersey Transportation Authority, Visit-Trips, Atlantic City, New Jersey, 2007 Annual Report, p. 1

While some of this potential visitor growth has instead been recently attending new competing convenience gaming offerings elsewhere, the new venues that have come on line have not had great impact on this feeder market participation. This general level of gaming and related entertainment participation remains substantially below its potential, given national population gaming participation rates in the mid to upper twenties percent. Bear in mind, the new convenience gaming locations in eastern Pennsylvania are garnering about only half their business from traditionally Atlantic City customers. The balance is all new business.

SEGMENT COMPARISONS

Segmentation of the survey data is accomplished through multiple methods in the following analysis. The first method is segmenting by survey location where data can be analyzed based on which of the 21 data collection sites responses were collected. The second, and most important, method is self-described segmentation based on the primary purpose of the visit, where visitors tell us why they came to Atlantic City regardless of where the responses were collected. The third method is behavioral segmentation, where responses are analyzed based on which particular activities visitors engaged in during their trip. In addition, important groups can be sub-segmented by any of the above criteria. Using all of these methods we can segregate the survey population into the following segments.

Primary Trip Purpose Segments:

- Gamblers
- Convention Attendees (by Day-trip and Overnight)
- Vacation/Pleasure (General Tourist)
- Event Attendees (used interchangeably in charts with "Concert Attendees.")
- Shoppers

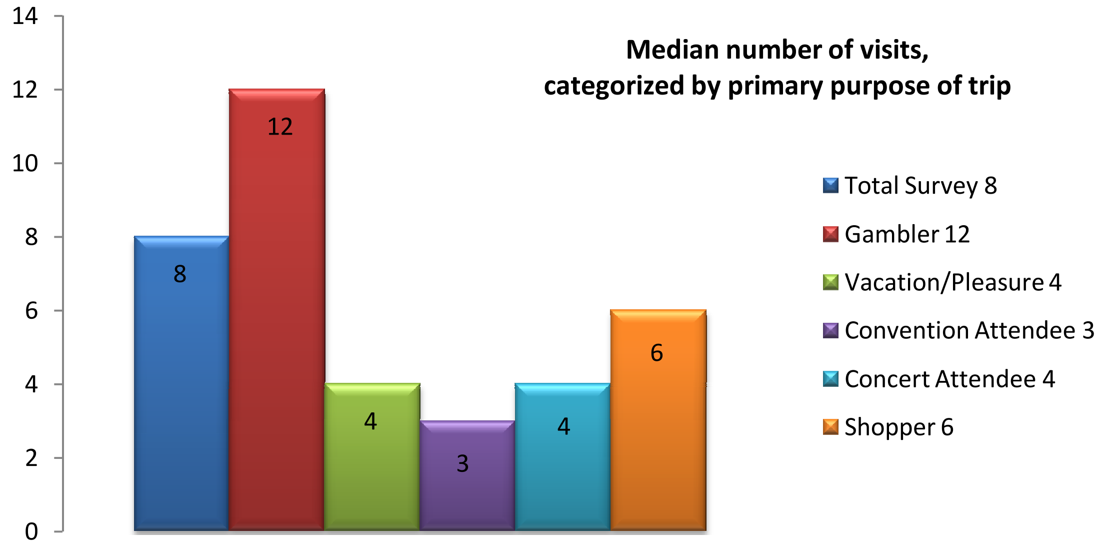
Behavioral Segments:

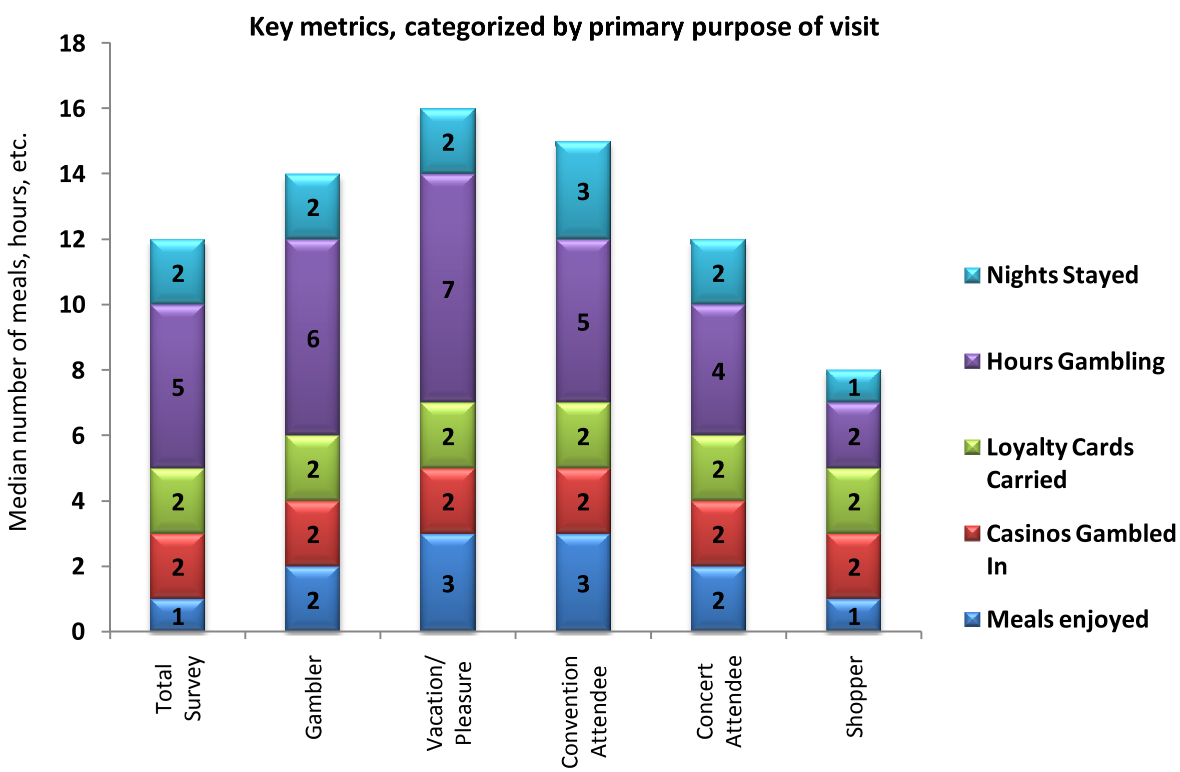
- Overnight Guests/Day Trippers
- Visit More/Less Often
- First Time Visitors
- Car/Bus/Other
- Package Purchasers
- Slots/Tables/Both
- Smoking/Non-Smoking
- Golfers
- Bus Travelers by Overnight/Day Trip

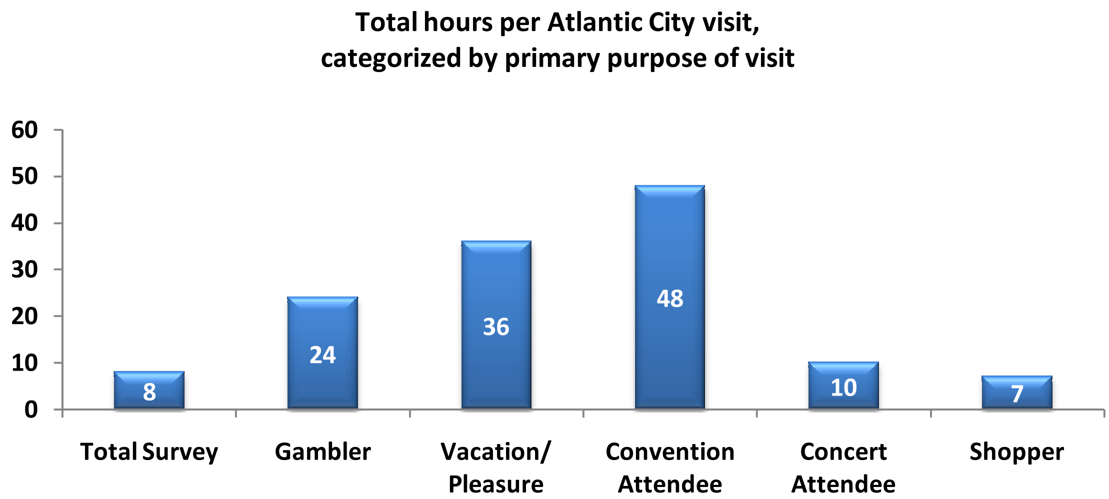
Several trip purpose segments display an obvious discrepancy between survey location percentage response and self-described trip purpose percentage response. These discrepancies show that visitors intercepted in the retail locations rarely describe their primary reason for visiting Atlantic City as shopping. Conversely, general tourists (vacation/pleasure), and to a lesser degree event attendees, describe a wider range of potential activities than that found at the particular location where these visitors were surveyed. Gamblers and convention attendees on the other hand, closely match their location with their primary purpose for visiting Atlantic City.

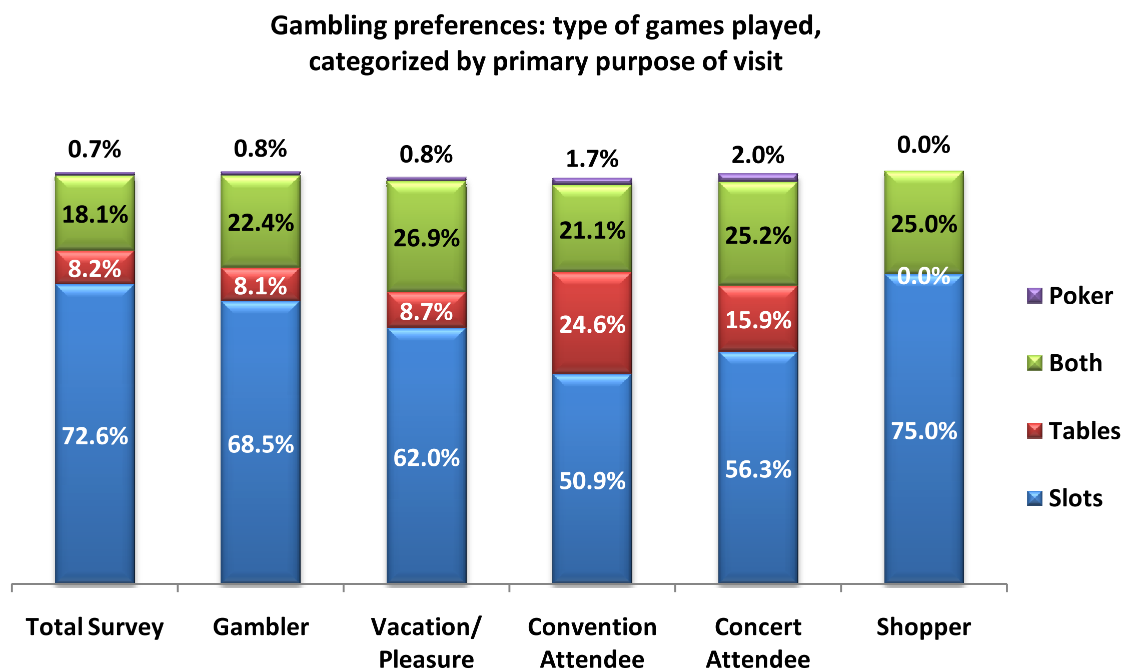
The following charts compare the various segments, categorized by trip purpose, according to various key metrics:

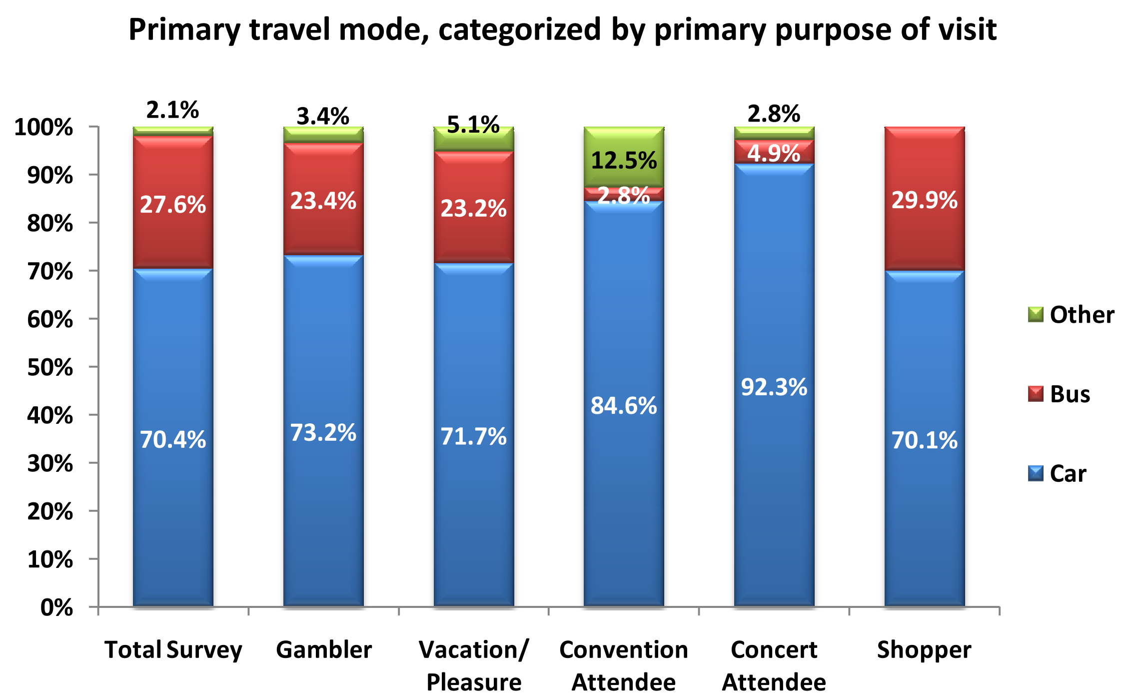
Figure 40 – Trip Purpose Segment Summary

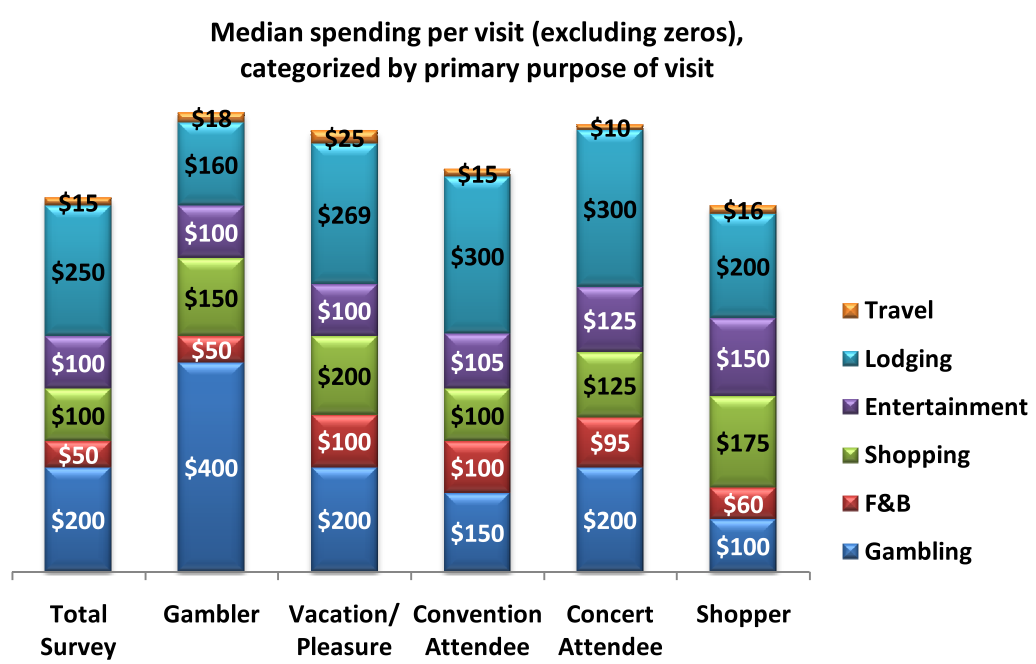




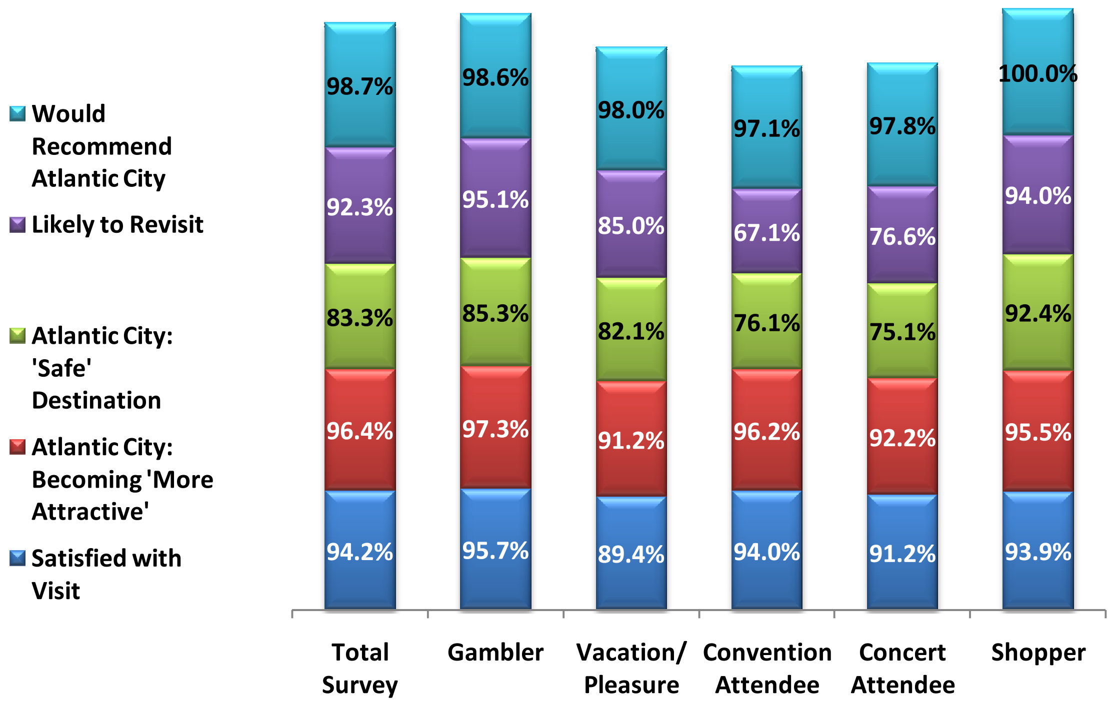

Total hours per Atlantic City visit,
categorized by primary purpose of visit
60
50
40
30
20
10
0
8
24
36
48
10
7
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper


Gambling preferences: type of games played,
categorized by primary purpose of visit
0.7%
18.1%
8.2%
72.6%
0.8%
22.4%
8.1%
68.5%
0.8%
26.9%
8.7%
62.0%
1.7%
21.1%
24.6%
50.9%
2.0%
25.2%
15.9%
56.3%
0.0%
25.0%
0.0%
75.0%
Poker
Both
Tables
Slots
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper

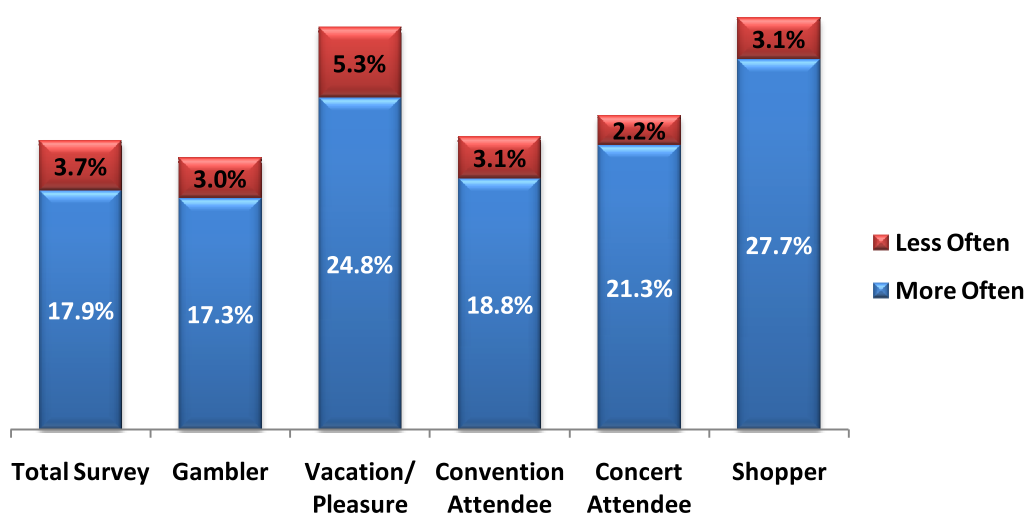

Primary travel mode, categorized by primary purpose of visit
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
2.1%
27.6%
70.4%
3.4%
23.4%
73.2%
5.1%
23.2%
71.7%
12.5%
2.8%
84.6%
2.8%
4.9%
92.3%
29.9%
70.1%
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper
Other
Bus
Car

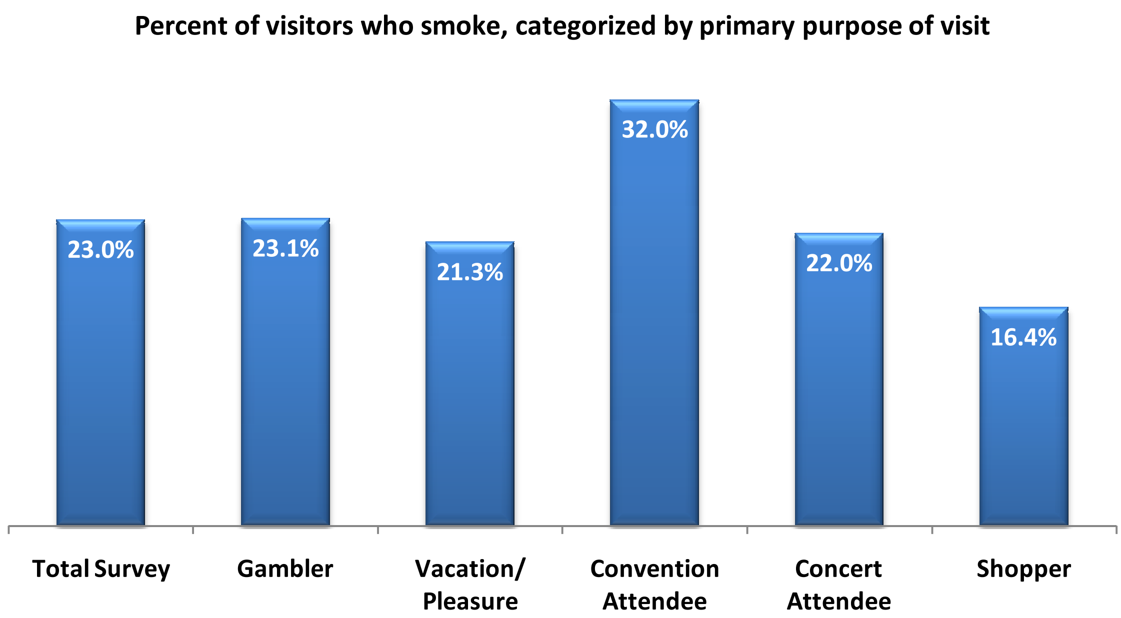

Median spending per visit (excluding zeros), categorized by primary purpose of visit
$15
$250
$100
$100
$50
$200
$18
$160
$100
$150
$50
$400
$25
$269
$100
$200
$100
$200
$15
$300
$105
$100
$100
$150
$10
$300
$125
$125
$95
$200
$16
$200
$150
$175
$60
$100
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper
Travel
Lodging
Entertainment
Shopping
F&B
Gambling

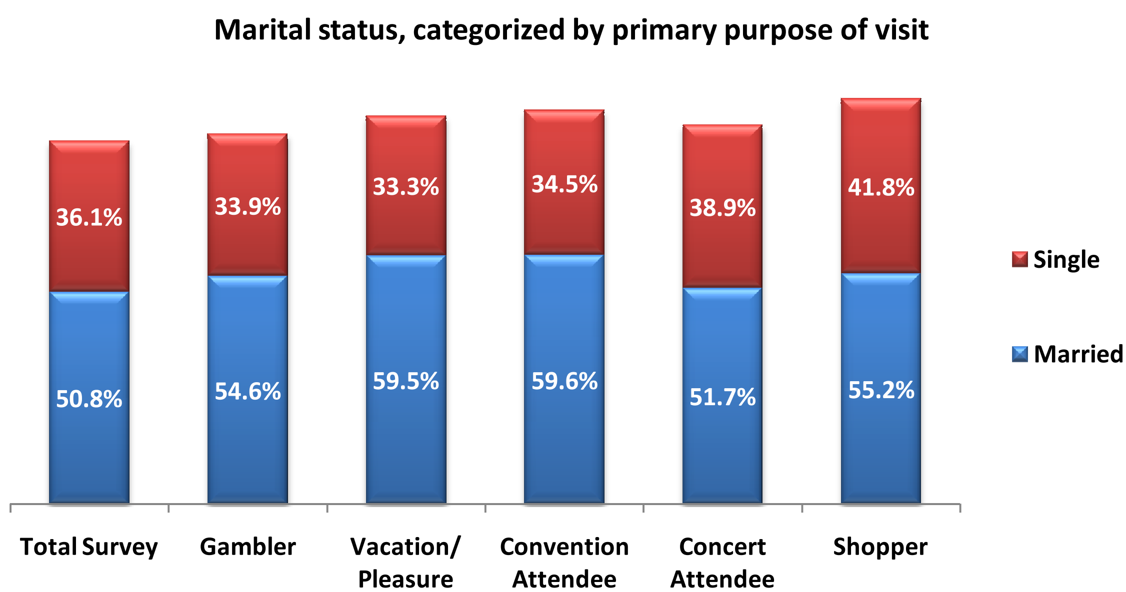
Attitudinal survey, categorized by primary purpose of visit

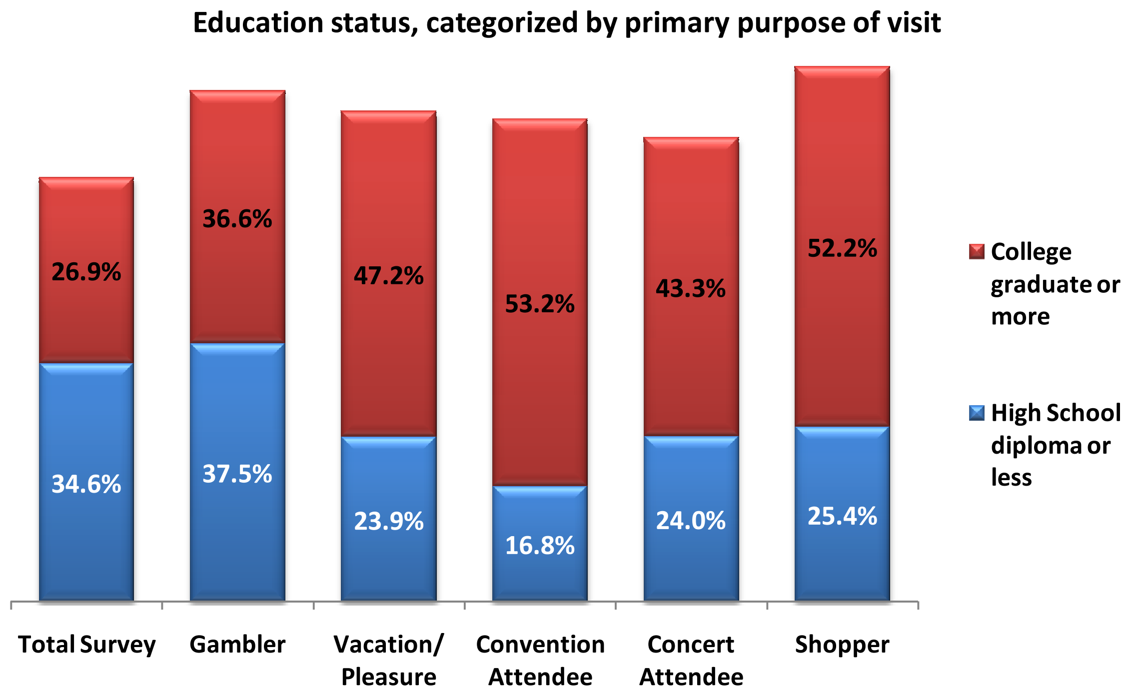


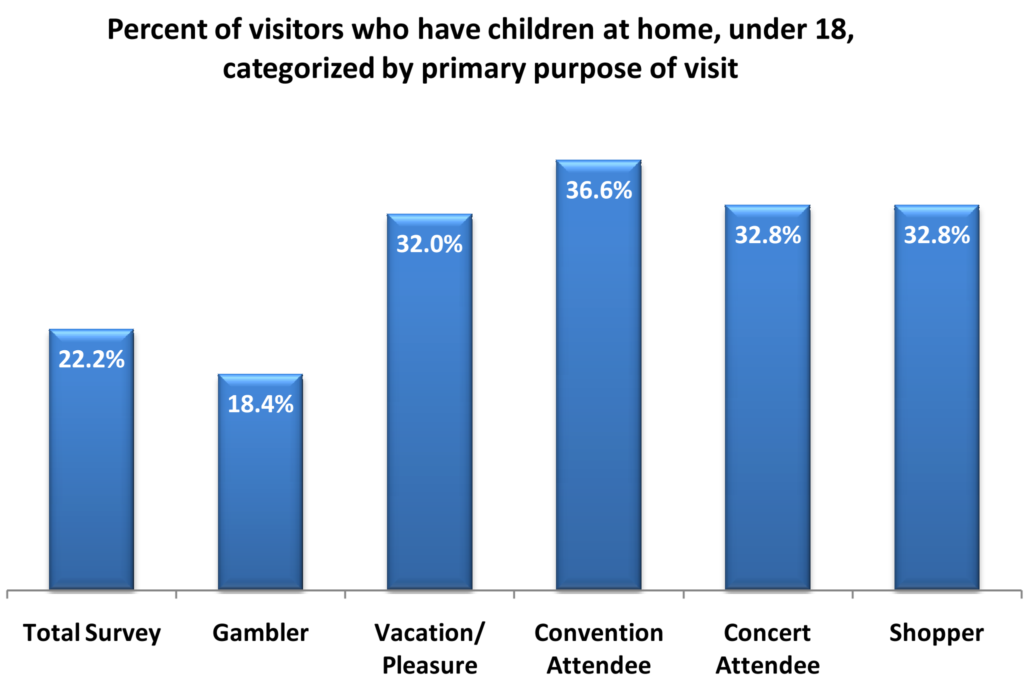
Planning to visit Atlantic City in the future, categorized by primary purpose of visit



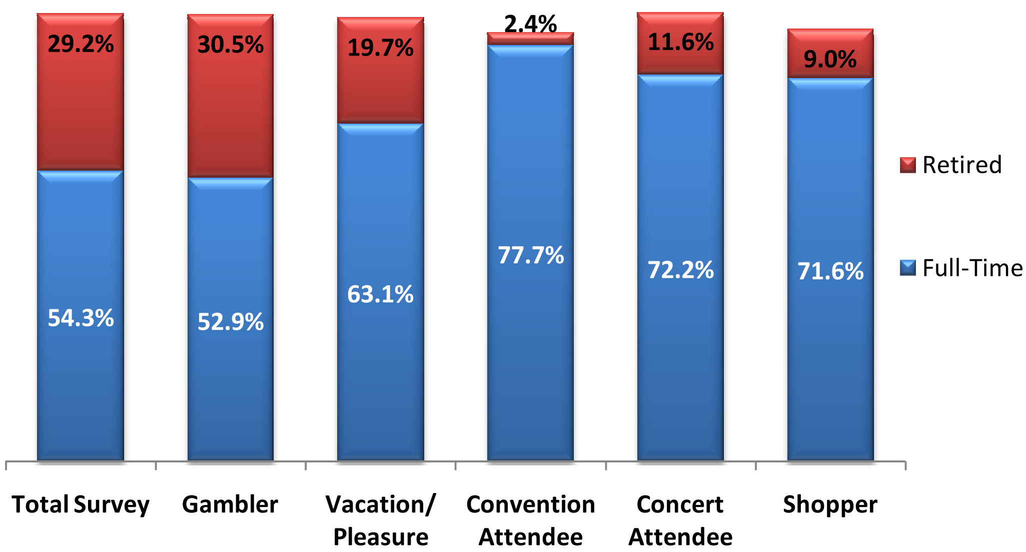

Percent of visitors who smoke, categorized by primary purpose of visit
23.0%
23.1%
21.3%
32.0%
22.0%
16.4%
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper


Marital status, categorized by primary purpose of visit
36.1%
33.9%
33.3%
34.5%
38.9%
41.8%
50.8%
54.6%
59.5%
59.6%
51.7%
55.2%
Single
Married
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper

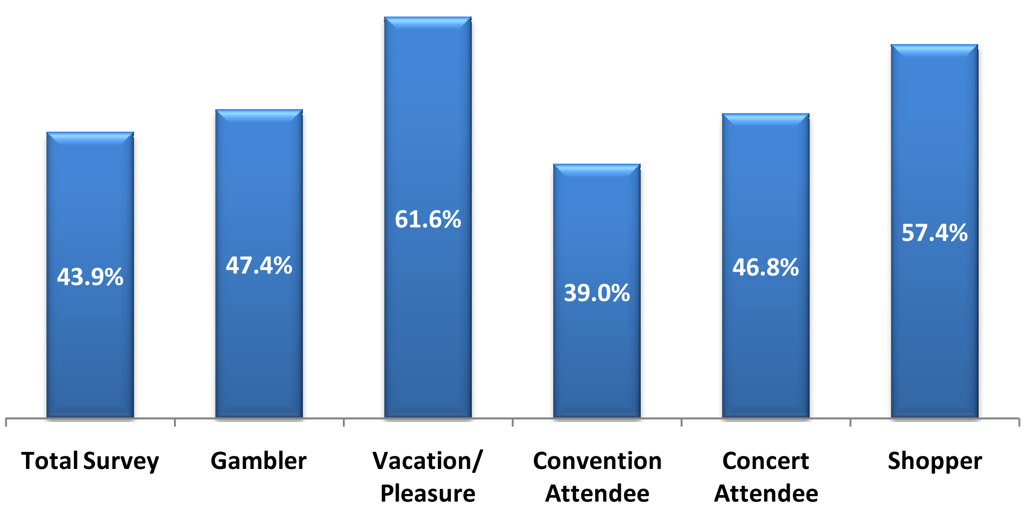

Education status, categorized by primary purpose of visit
26.9%
36.6%
47.2%
53.2%
43.3%
52.2%
34.6%
37.5%
23.9%
16.8%
24.0%
25.4%
College graduate or more
High School diploma or less
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper


Percent of visitors who have children at home, under 18, categorized by primary purpose of visit
22.2%
18.4%
32.0%
36.6%
32.8%
32.8%
Total Survey
Gambler
Vacation/ Pleasure
Convention Attendee
Concert Attendee
Shopper

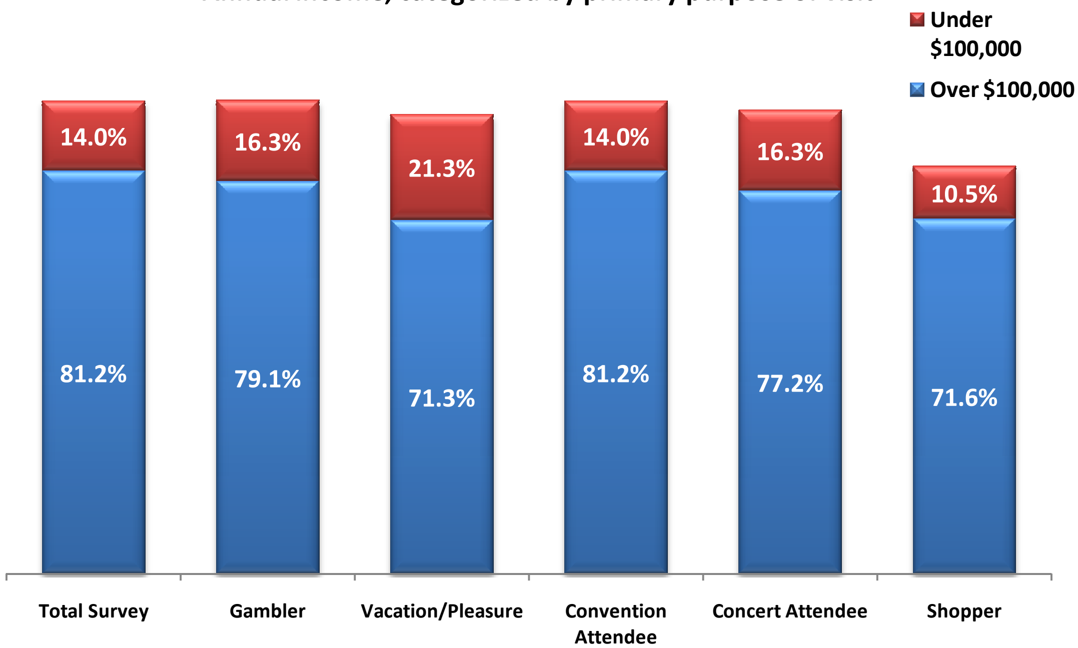
Employment, categorized by primary purpose of visit



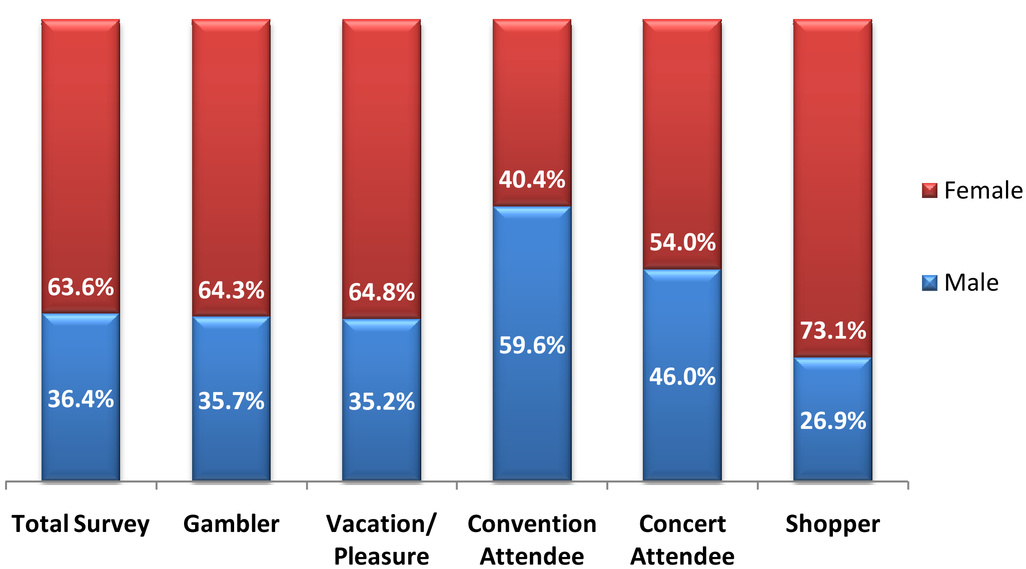
Percent who have professional/technical careers, categorized by primary purpose of visit

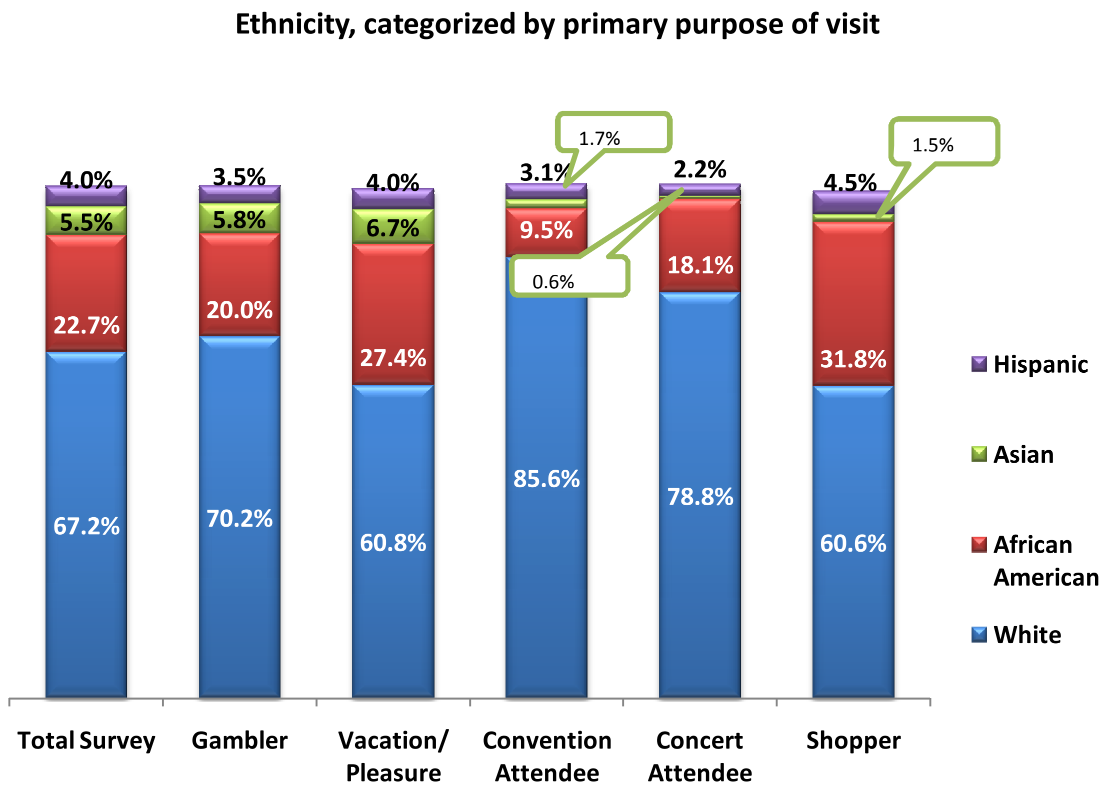


Annual income, categorized by primary purpose of visit



Gender, categorized by primary purpose of visit





Examining the travel segments above shows that gamblers and shoppers are the most frequent visitors to Atlantic City (median trips 12 and 6, respectively) while general tourists (vacation/pleasure) spend the greatest amounts (median $623) per trip. Convention attendees are the youngest segment (median age 43); it stays the longest (median 3 nights), and is most likely to come by air or train (12.5%), as well as to be smokers (32.0%).

Gamblers are the oldest segment (median age 56). Event and convention attendees have the longest trip planning horizons (median 31 and 30 days, respectively). Shoppers and general tourists are the segments coming more frequently than in the past at 27.7% and 24.8%, respectively. Shoppers are also the segment most likely to recommend Atlantic City to friends and family (100%). Conversely, less-frequent visitors – such as event and convention attendees – are least likely to perceive Atlantic City as a safe destination (75.1% and 76.1%, respectively).

Gamblers

Visitors who say that the primary purpose of their visit is to gamble make up 55.3 percent of the survey prior to weighting, or a total of 1,708 responses. Because this is the largest segment in the survey base, gambler response are highly similar to the overall weighted survey results. These visitors come most frequently and are the most likely to revisit Atlantic City in the near future. The worth of these visitors is less substantial on an individual trip basis (median spending $505) but is the most valuable in terms of cumulative annual spending given that their median trip frequency is monthly.

Figure 41 – Gambler Segment Profile

Key numeric measures: Gamblers (1,708 responses)	Mean	Median	Mode
Age	55	56	55
No. of annual visits	22.8	12	12
Meals eaten	3.5	2	1
Casinos Gambled During Visit	2.2	2	2
Loyalty Cards Carried	3.1	2	2
Hours Gambling	12.5	6	5
Nights Stayed	2.2	2	2
Total Hours in Atlantic City	32.8	24	8
Adults in Party	2. 5	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	2.8	1	0
Planning Days	13.9	7	7

Gamblers: spend per visit*	Mean, counting 0	Mean, Not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$699	$710	$400	$400	$500	$500
F&B	$56	$96	$20	$50	$0	$100
Shopping	$72	$203	$0	$150	$0	$100
Entertainment	$11	$146	$0	$100	$0	$100
Lodging	$11	$249	$0	$160	$0	$150*
Travel	$34	$38	$15	$18	$5	$5
Total Spending	$883	$883	$505	$505	$500*	$500*

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Gamblers: key trip characteristics	Category	Percentage
Travel Mode	Car	73.2%
	Bus	23.4%
	Other	3.4%
Stay Overnight?	Overnight Guest	52.0%
	Day Tripper	47.4%
Those Who are Traveling as Part of Package	% Yes	26.3%

Gamblers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	23.1%
Marital Status	Married	54.6%
	Single	33.9%
Education	High school graduate or less	37.5%
	College graduate or more	36.6%
Empty Nester	Children <18	18.4%
Employment	Full-Time	52.9%
	Retired	30.5%
Occupation	Professional/Tech	47.4%
Household Income	% Under $100K	79.1%
	% Over $100K	16.3%
Ethnicity	White/Caucasian	70.2%
	African American	20.0%
	Asian	5.8%
	Hispanic	3.5%
Gender	Male	35.7%
	Female	64.3%

Gamblers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	68.5%
	Tables	8.1%
	Both	22.4%
	Poker	0.8%
	Other	0.2%
Member of Player Loyalty Club	% Yes	90.1%
% Who Gamble Elsewhere	% Yes	42.5%

Gamblers: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	95.7%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	97.3%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	85.3%
% Likely to Revisit	Within Next 2 Yrs	95.1%
Those Who Would Recommend Atlantic City to others	% Yes	98.6%
Those who are currently visiting Atlantic City:	More Often	17.3%
	Less Often	3.0%

*Multiple modes exist. The smallest value is shown.

When it comes to gambling bankrolls, table games players as a group wager the most on gambling while slot players have the smallest budgets. Gamblers who play both slots and table games have the second highest level of gambling budget, followed by poker players, who wager more on average than slot players, while the very small segment that plays "other" games, usually keno or simulcast, wager the least on gambling.

Total spending follows a similar pattern with table games players spending the most in total, on average, per trip, followed by both slots and table games players, poker players, slot players, and players of "other" games.

Figure 42 – Gambling and Total Spending by Game Type Played

	Gambling Spending (Mean)		Total Spending (Mean)	
	w/0's	**w/o 0's**	**w/0's**	**w/o 0's**
Table Games	$1,179	$1,215	$1,658	$1,672
Slots & Tables	$934	$949	$1,301	$1,301
Card Poker	$598	$652	$884	$884
Slots	$483	$493	$703	$704
Other	$100	$200	$202	$202

General Tourist (Vacation Pleasure)

Visitors who describe the primary purpose of their visit as vacation/pleasure make up 14.5 percent of the survey, or a total of 448 responses. These visitors are among the most valuable in terms of their length of stay (median 36 hours) and subsequently greater spending (median $623), but they come to Atlantic City much less frequently than the self-described gamblers (median 4 annual visits).

Vacation/pleasure visitors spend comparable amounts on entertainment as event attendees (median $100 each segment), and spend the most on travel (median $25). Vacation/pleasure visitors also reflect higher income levels than other trip purpose segments, with 21.3 percent earning over $100,000 annually.

Figure 43 – General Tourist (Vacation/Pleasure) Segment Profile

Key numeric measures: General tourist, vacation/pleasure (448 responses)			
	Mean	Median	Mode
Age	49	49	51
No. of annual visits	8.6	4	1
Meals eaten	5.3	3	1
Casinos Gambled During Visit	2.4	2	1
Loyalty Cards Carried	2.7	2	1
Hours Gambling	15.8	7	4
Nights Stayed	2.7	2	2
Total Hours in Atlantic City	45.0	36	48
Adults in Party	2.9	2	2
No. of Those Under 21 in Party	0.4	0	0
Overnight Trips to Other Destinations	3.3	1	0
Planning Days	24.1	14	30

General tourists: spending per visit*	Mean, counting 0	Mean, Not counting 0	Median, counting 0	Median not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$492	$568	$200	$200	$0*	$200
F&B	$144	$165	$100	$100	$200	$200
Shopping	$160	$249	$60	$200	$0	$200
Entertainment	$54	$182	$0	$100	$0	$100
Lodging	$54	$353	$0	$269	$0	$400
Travel	$81	$89	$20	$25	$20	$20
Total Spending	$985	$990	$620	$623	$220*	$220*

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

General tourists: key trip characteristics	Category	Percentage
Travel Mode	Car	71.7%
	Bus	23.2%
	Other	5.1%
Stay Overnight	Overnight Guest	62.9%
	Day Tripper	35.7%
Those Who are Traveling as Part of Package	% Yes	23.9%

General tourists: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	21.3%
Marital Status	Married	59.5%
	Single	33.3%
Education	High school graduate or less	23.9%
	College graduate or more	47.2%
Empty Nester	Children <18	32.0%
Employment	Full-Time	63.1%
	Retired	19.7%
Occupation	Professional/Tech	61.6%
Household Income	% Under $100K	71.3%
	% Over $100K	21.3%
Ethnicity	White/Caucasian	60.8%
	African American	27.4%
	Asian	6.7%
	Hispanic	4.0%
Gender	Male	35.2%
	Female	64.8%

General tourists: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	62.0%
	Tables	8.7%
	Both	26.9%
	Poker	0.8%
	Other	0.4%
Member of Player Loyalty Club	% Yes	67.7%
% Who Gamble Elsewhere	% Yes	38.4%

General tourists: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	89.4%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	91.2%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	82.1%
% Likely to Revisit	Within Next 2 Yrs	85.0%
Those Who Would Recommend Atlantic City to others	% Yes	98.0%
Those who are currently visiting Atlantic City:	More Often	24.8%
	Less Often	5.3%

*Multiple modes exist. The smallest value is shown.

Convention Attendees

Visitors who describe the primary purpose of their Atlantic City trip as attending a convention, trade show or business meeting make up 13.7 percent of the survey,[16] or a total of 423 responses. Convention attendees are the third-most valuable in terms of per-trip spending (median $660) and the most valuable in terms of lodging spend (median $300) due to their long length of stay (median 48 hours), however they come to Atlantic City least frequently of all the segments in the survey (median 3 annual visits). Convention attendees are also the second-youngest segment after first-time visitors, with a median age of 43, and are most likely to be white (85.6%), be employed full-time (77.7%), play table games (24.6%), and to have children under 18 still living at home (36.6%).

Convention Attendees Overnight Guest

The convention, trade show, or business meeting attendee who stays overnight in Atlantic City is a different type of visitor than the casual day-trip convention guest. They stay much longer, engage in more activities, and consequently spend more than day trip visitors. Overnight convention attendees are profiled below.

[16] We specifically targeted convention and meeting attendees – along with other groups, such as concert attendees -- to comprise a significant percentage of those surveyed. Such percentages should not be interpreted as reflective of the proportion of such groups within the overall Atlantic City visitor base.

Figure 44 – Convention Attendee Overnight Guest Segment Profile

Key numeric measures: Convention Overnight (250 responses)	Mean	Median	Mode
Age	44	45	54
No. of annual visits	4.2	2	1
Meals eaten	6.6	6	6
Casinos Gambled During Visit	2.2	2	2
Loyalty Cards Carried	2.0	2	2
Hours Gambling	15.5	5	5
Nights Stayed	2.8	3	2
Total Hours in Atlantic City	70.7	72	72
Adults in Party	2.6	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	3.1	2	2
Planning Days	59.0	60	60

Convention overnight: spend per visit*	Mean, counting 0	Mean,not counting 0	Median, counting 0	Median not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$226	$296	$100	$200	$0	$100*
F&B	$225	$240	$200	$200	$200	$200
Shopping	$126	$190	$100	$150	$0	$100
Entertainment	$91	$413	$0	$150	$0	$100
Lodging	$210	$410	$59	$300	$0	$300
Travel	$94	$103	$20	$22	$20	$20
Total Spending	$971	$666	$660	$660	$600	$600

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Convention overnight: key trip characteristics	Category	Percentage
Travel Mode	Car	79.6%
	Bus	2.4%
	Other	18.0%
Stay Overnight	Overnight Guest	100.0%
	Day Tripper	0.0%
Those Who are Traveling as Part of Package	% Yes	14.8%

Convention overnight:: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	32.4%
Marital Status	Married	62.4%
	Single	34.8%
Education	High school graduate or less	16.8%
	College graduate or more	60.8%
Empty Nester	Children <18	32.8%
Employment	Full-Time	76.3%
	Retired	3.2%
Occupation	Professional/Tech	44.5%
Household Income	% Under $100K	70.7%
	% Over $100K	23.7%
Ethnicity	White/Caucasian	83.6%
	African American	12.8%
	Asian	0.4%
	Hispanic	3.2%
Gender	Male	59.2%
	Female	40.8%

Convention overnight: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	48.8%
	Tables	23.2%
	Both	24.8%
	Poker	2.4%
	Other	0.8%
Member of Player Loyalty Club	% Yes	30.8%
% Who Gamble Elsewhere	% Yes	23.7%

Convention overnight: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	95.1%
Those Who View Atlantic City as ‘More Attractive’	Agree/Strongly Agree	95.9%
Those Who View Atlantic City as ‘Safe’	Agree/Strongly Agree	79.0%
% Likely to Revisit	Within Next 2 Yrs	67.6%
Those Who Would Recommend A.C. to others	% Yes	96.0%
Currently Visiting Atlantic City:	More Often	16.5%
	Less Often	4.4%

*Multiple modes exist. The smallest value is shown.

Convention Attendees Day Trip

Day-trip convention, trade show, or business meeting visitors exhibit shorter length of stay, engage in fewer activities, and consequently spend less than overnight convention attendees. However, day-trip convention visitors are highly satisfied with Atlantic City and as a segment they display the lowest proportion visiting Atlantic City less frequently than they did last year. Day-trip convention attendees are profiled below.

Figure 45 – Convention Attendee Day-Trip Segment Profile

Key numeric measures: Convention Day Trip (171 responses)	Mean	Median	Mode
Age	42	42	39
No. of annual visits	5.1	3.5	2
Meals eaten	1.3	1	1
Casinos Gambled During Visit	1.1	1	1
Loyalty Cards Carried	2.2	2	2
Hours Gambling	3.9	2	3
Nights Stayed	0	0	0
Total Hours in Atlantic City	10.4	8	8
Adults in Party	2.3	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	1.5	1	0
Planning Days	40.8	30	30

Convention day trip: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$85	$250	$0	$100	$0	$100
F&B	$73	$75	$50	$50	$50	$50
Shopping	$35	$100	$0	$100	$0	$100
Entertainment	$20	$338	$0	$88	$0	$50
Lodging	$0	$0	$0	$0	$0	$0
Travel	$13	$14	$6	$8	$5	$5
Total Spending	$226	$226	$98	$98	$45	$45

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Convention day trip: key trip characteristics	Category	Percentage
Travel Mode	Car	92.4%
	Bus	3.5%
	Other	4.1%
Stay Overnight	Overnight Guest	0.0%
	Day Tripper	100.0%
Those Who are Traveling as Part of Package	% Yes	0.0%

Convention day trip: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	30.6%
Marital Status	Married	56.1%
	Single	33.9%
Education	High school graduate or less	16.4%
	College graduate or more	42.1%
Empty Nester	Children <18	42.7%
Employment	Full-Time	80.1%
	Retired	1.2%
Occupation	Professional/Tech	31.0%
Household Income	% Under $100K	71.2%
	% Over $100K	18.2%
Ethnicity	White/Caucasian	88.3%
	African American	4.7%
	Asian	3.5%
	Hispanic	2.9%
Gender	Male	60.8%
	Female	39.2%

Convention day trip: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	57.1%
	Tables	26.5%
	Both	12.2%
	Poker	0.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	32.5%
% Who Gamble Elsewhere	% Yes	9.8%

Convention day trip: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	92.4%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.5%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	71.8%
% Likely to Revisit	Within Next 2 Yrs	66.1%
Those Who Would Recommend Atlantic City to others	% Yes	98.8%
Currently Visiting Atlantic City:	More Often	22.2%
	Less Often	1.2%

*Multiple modes exist. The smallest value is shown.

Event Attendees

Visitors who describe the primary purpose of their Atlantic City trip as attending a concert, fight, or other entertainment or show make up 10.5 percent of the survey, or a total of 324 responses. Event attendees are the second-youngest segment in the survey, with a median age of 44 and among the least likely to be married (51.7%). This segment is less likely to stay overnight (44.7%) and most likely to travel by car (92.3%). They are also more strongly male (46.0%) and more likely to be working full-time (72.2%) than other trip purpose segments with the exception of convention attendees. As might be expected, event attendees spend heavily on entertainment (median $100 per trip) and this segment is also more likely to be visiting Atlantic City more frequently than they have in the past (21.3%).

Figure 46 – Event Attendees Segment Profile

	Key numeric measures: Event attendees (324 responses)		
	Mean	Median	Mode
Age	44	44	39
No. of annual visits	8.8	4	3
Meals eaten	2.8	2	1
Casinos Gambled During Visit	1.2	2	1
Loyalty Cards Carried	2.1	2	2
Hours Gambling	5.2	4	2
Nights Stayed	1.8	2	2
Total Hours in Atlantic City	24.6	10	8
Adults in Party	2.9	2	2
No. of Those Under 21 in Party	0.4	0	0
Overnight Trips to Other Destinations	2.1	1	0
Planning Days	35.9	30	30

Event attendees: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$354	$526	$100	$200	$0	$100
F&B	$112	$126	$60	$95	$100	$100
Shopping	$90	$222	$0	$125	$0	$100
Entertainment	$138	$180	$100	$125	$0	$200
Lodging	$31	$303	$0	$300	$0	$300
Travel	$47	$53	$10	$10	$5	$5
Total Spending	$772	$779	$382	$390	$115*	$115*

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Event attendees: key trip characteristics	Category	Percentage
Travel Mode	Car	92.3%
	Bus	4.9%
	Other	2.8%
Stay Overnight	Overnight Guest	44.7%
	Day Tripper	54.7%
Those Who are Traveling as Part of Package	% Yes	20.4%

Event attendees: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	22.0%
Marital Status	Married	51.7%
	Single	38.9%
Education	H.S. graduate or less	24.0%
	College graduate or more	43.3%
Empty Nester	Children <18	32.8%
Employment	Full-Time	72.2%
	Retired	11.6%
Occupation	Professional/Tech	46.8%
Household Income	% Under $100K	77.2%
	% Over $100K	16.3%
Ethnicity	White/Caucasian	78.8%
	African American	18.1%
	Asian	0.6%
	Hispanic	2.2%
Gender	Male	46.0%
	Female	54.0%

Event attendees: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	56.3%
	Tables	15.9%
	Both	25.2%
	Poker	2.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	47.2%
% Who Gamble Elsewhere	% Yes	23.4%

Event attendees: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	91.2%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	92.2%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	75.1%
% Likely to Revisit	Within Next 2 Yrs	76.6%
Those Who Would Recommend A.C. to others	% Yes	97.8%
Those who are currently visiting Atlantic City:	More Often	21.3%
	Less Often	2.2%

*Multiple modes exist. The smallest value is shown.

Shoppers

Visitors who visit primarily to shop in Atlantic City are the smallest statistically significant trip-purpose segment, making up 2.2 percent of the survey, or a total of 67 responses. Shoppers are least likely to eat a meal during their stay, and least likely to gamble during a trip (23.9%), but they the most highly satisfied with their trip, and most likely to revisit within the next two years. This segment is predominantly female (73.1%) and reflects the strongest positive attitudes toward the resort as they are most likely to perceive Atlantic City as more attractive and safe, most likely to be visiting the destination more frequently. Most importantly, every shopper in the survey (100%) would recommend Atlantic City to a friend or family member. Shoppers are also the segment least likely to be smokers or to play table games.

Figure 47 – Shopper Segment Profile

Key numeric measures: Shoppers (67 responses)	Mean	Median	Mode
Age	44	45	54*
No. of annual visits	12.5	6	2
Meals eaten	1.8	1	1
Casinos Gambled During Visit	1.8	2	2
Loyalty Cards Carried	2.1	1	1
Hours Gambling	2.0	2	0
Nights Stayed	1.6	1	1
Total Hours in Atlantic City	14.8	7	6
Adults in Party	2.6	2	2
No. of Those Under 21 in Party	0.5	0	0
Overnight Trips to Other Destinations	2.7	2	0
Planning Days	14.1	6.5	7

Shoppers: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$109	$208	$20	$100	$0	$200
F&B	$64	$73	$50	$60	$100	$100
Shopping	$199	$202	$175	$175	$100	$100
Entertainment	$14	$152	$0	$150	$0	$100*
Lodging	$3	$200	$0	$200	$0	$200
Travel	$19	$25	$8	$16	$0	$5
Total Spending	$408	$408	$310	$310	$250	$250

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Shoppers: key trip characteristics	Category	Percentage
Travel Mode	Car	70.1%
	Bus	29.9%
	Other	0%
Stay Overnight	Overnight Guest	17.9%
	Day Tripper	82.1%
Those Who are Traveling as Part of Package	% Yes	25.0%

Shoppers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	16.4%
Marital Status	Married	55.2%
	Single	41.8%
Education	High school graduate or less	25.4%
	College graduate or more	52.2%
Empty Nester	Children <18	32.8%
Employment	Full-Time	71.6%
	Retired	9.0%
Occupation	Professional/Tech	57.4%
Household Income	% Under $100K	71.6%
	% Over $100K	10.5%
Ethnicity	White/Caucasian	60.6%
	African American	31.8%
	Asian	1.5%
	Hispanic	4.5%
Gender	Male	26.9%
	Female	73.1%

Shoppers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	75.0%
	Tables	0%
	Both	25.0%
	Poker	0%
	Other	0%
Member of Player Loyalty Club	% Yes	56.7%
% Who Gamble Elsewhere	% Yes	24.1%

Shoppers: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	93.9%
Those Who View Atlantic City as ‘More Attractive’	Agree/Strongly Agree	95.5%
Those Who View Atlantic City as ‘Safe’	Agree/Strongly Agree	92.4%
% Likely to Revisit	Within Next 2 Yrs	94.0%
Those Who Would Recommend A.C. to others	% Yes	100%
Those who are currently visiting Atlantic City:	More Often	27.7%
	Less Often	3.1%

*Multiple modes exist. The smallest value is shown.

Segment Comparisons – Behavioral Segments

The following tables summarize and compare key measures between several of the largest and most important behavioral segments mentioned above.

Figure 48 – Behavioral Segments Summary

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
		Key Numeric Measures (Median)			
Age	51	52	49	52	38
No. of annual visits	6	10	6	6	1
Meals eaten	4	1	2	2	5
No. of Casinos Gambled in	2	2	2	2	2
Loyalty Cards Carried	2	2	2	2	1
Hours Gambling	10	5	6	6	5
Nights Stayed	2	0	2	2	3
Total Hours in Atlantic City	50	8	24	12	48
Adults in Party	2	2	2	2	2
Under 21 in Party	0	0	0	0	0
Overnight Trips to Other Destinations	2	1	2	2	1
Planning Days	14	7	14	7	30

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
		Median Spending (including responses of 0)			
Gambling	$400	$150	$200	$200	$100
F&B	$80	$25	$50	$30	$100
Shopping	$50	$0	$0	$0	$50
Entertainment	$0	$0	$0	$0	$0
Lodging	$0	$0	$0	$0	$0
Travel	$20	$10	$18	$15	$30
Total Spending	$755	$262	$467	$505	$614
Gambling	$500	$200	$300	$250	$200
F&B	$150	$40	$73	$100	$150

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
Median Spending (excluding responses of 0)					
Gambling	$500	$200	$300	$250	$200
F&B	$150	$40	$73	$100	$150
Shopping	$200	$100	$150	$200	$100
Entertainment	$120	$100	$100	$100	$150
Lodging	$300	$0	$300	$385	$350
Travel	$22	$10	$20	$21	$35
Total Spending	$755	$262	$467	$507	$620

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
Travel Patterns					
Car	80.1%	71.9%	77.6%	77.0%	64.0%
Bus	11.6%	26.9%	17.6%	20.0%	11.4%
Other	8.4%	1.2%	4.8%	3.0%	24.6%
Stay Overnight: Yes	100.0%	0.0%	53.3%	49.0%	71.9%
Stay Overnight: No	0.0%	100.0%	46.2%	51.0%	28.1%
Package	23.8%	6.7%	20.5%	32.6%	20.0%

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
Gambling: Types of games played					
Slots	60.1%	73.1%	64.9%	62.2%	71.4%
Tables	11.0%	8.9%	10.9%	10.8%	9.5%
Both	27.1%	16.6%	21.4%	23.0%	19.0%
Poker	1.3%	0.7%	1.8%	4.1%	0%
Player Loyalty Club	74.0%	70.7%	73.2%	68.7%	21.2%
Gamble Elsewhere	41.7%	28.1%	40.0%	50.6%	33.3%

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
		Attitudinal Survey			
Satisfaction with Atlantic City	94.6%	93.0%	91.6%	76.0%	93.9%
Atlantic City Becoming 'More Attractive'	95.3%	95.3%	96.0%	84.5%	92.7%
Atlantic City Is 'Safe'	84.3%	80.8%	81.5%	74.7%	89.0%
Would revisit	86.7%	87.7%	89.4%	89.0%	51.8%
Would Recommend to Friends	98.2%	98.4%	99.5%	94.9%	94.6
Intend to Visit: More Often	19.7%	19.7%	100.0%	0.0%	18.8%
Intend to Visit: Less Often	3.0%	3.6%	0.0%	100.0%	0.9%

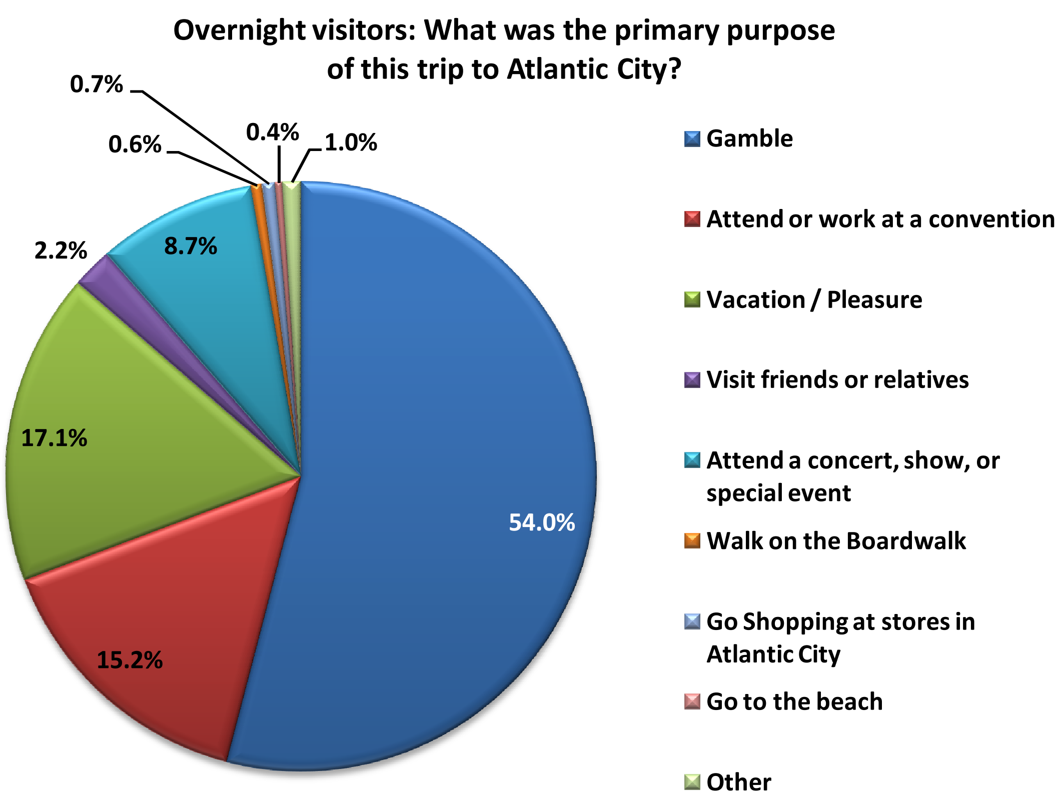
Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
		Demographics			
Smoke	24.2%	22.8%	23.7%	24.0%	31.0%
Age	51	52	49	52	38
Married	60.5%	49.8%	55.8%	49.0%	52.2%
Single	32.4%	37.7%	35.7%	39.0%	45.1%
High School Graduate, or less	27.5%	34.2%	28.8%	29.0%	23.9%
College Graduate, or more	48.0%	36.6%	43.4%	50.0%	55.7%
Children <18	23.2%	26.9%	29.4%	27.0%	31.9%
Employment					
Full-Time	61.4%	59.0%	63.4%	60.0%	74.1%
Retired	20.5%	24.2%	19.7%	22.0%	8.0%
Prof./Tech	53.6%	42.8%	51.3%	65.9%	60.0%
Income					
Under $100K	72.6%	80.3%	75.8%	71.0%	83.0%
Over $100K	21.4%	13.5%	19.1%	18.0%	14.3%
Ethnicity					
White	74.5%	68.2%	70.7%	63.9%	74.3%
African American	17.6%	22.3%	19.3%	23.7%	15.0%
Asian	4.6%	4.9%	3.9%	4.1%	5.3%
Hispanic	3.0%	3.9%	5.4%	5.2%	3.5%

Segment Comparisons	Overnight Guest	Day Tripper	Come More Often	Come Less Often	First Time Visitor
Gender					
Male	40.7%	38.6%	35.3%	31.0%	50.0%
Female	59.3%	61.4%	64.7%	69.0%	50.0%

Overnight Visitors

Overnight visitors are somewhat more likely to be coming to Atlantic City to attend a convention or trade show (15.2%), or as general tourists for vacation or pleasure (17.1%). They are more likely than day-trippers to have gambled elsewhere, and tend to spend substantially more per trip ($755 vs. $262).

Figure 49 – Overnight Visitor Primary Trip Purpose



Overnight visitors are likely to make overnight trips to other resort destinations and to gamble during those trips (41.7%). Overnight guests most likely to travel by car (80.1%). They are well educated and have a high economic value, with a median spending figure of $755. They are only slightly younger than the overall survey, with a median age of 51 years old and likely to be married. This segment is more heavily male than the day trippers segment.

Figure 50 – Overnight Visitor Segment Profile

Key numeric measures: Overnight Visitors (1,651 responses)	Mean	Median	Mode
Age	51	51	51
No. of annual visits	14.3	6	12
Meals eaten	5.7	4	6
Casinos Gambled During Visit	2.4	2	2
Loyalty Cards Carried	3.0	2	2
Hours Gambling	17.5	10	5
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	57.4	50	48
Adults in Party	2.6	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips: Other Destinations	3.4	2	0
Planning Days	29.9	14	30

Overnight visitors: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$760	$822	$400	$500	$500	$500
F&B	$130	$186	$80	$150	$0	$200
Shopping	$128	$239	$50	$200	$0	$200
Entertainment	$50	$225	$0	$120	$0	$100
Lodging	$66	$344	$0	$269	$0	$300
Travel	$64	$70	$20	$22	$0	$20
Total Spending	$1,198	$1,200	$755	$755	$500	$500

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Overnight visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	80.1%
	Bus	11.6%
	Other	8.4%
Stay Overnight	Overnight Guest	100.0%
	Day Tripper	0.0%
Those Who are Traveling as Part of Package	% Yes	23.8%

Overnight visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	24.2%
Marital Status	Married	60.5%
	Single	32.4%
Education	H.S. graduate or less	27.5%
	College graduate or more	48.0%
Empty Nester	Children <18	23.2%
Employment	Full-Time	61.4%
	Retired	20.5%
Occupation	Professional/Tech	53.6%
Household Income	% Under $100K	72.6%
	% Over $100K	21.4%
Ethnicity	White/Caucasian	74.5%
	African American	17.6%
	Asian	4.6%
	Hispanic	3.0%
Gender	Male	40.7%
	Female	59.3%

Overnight visitors: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	60.1%
	Tables	11.0%
	Both	27.1%
	Poker	1.3%
	Other	0.2%
Member of Player Loyalty Club	% Yes	74.0%
% Who Gamble Elsewhere	% Yes	41.7%

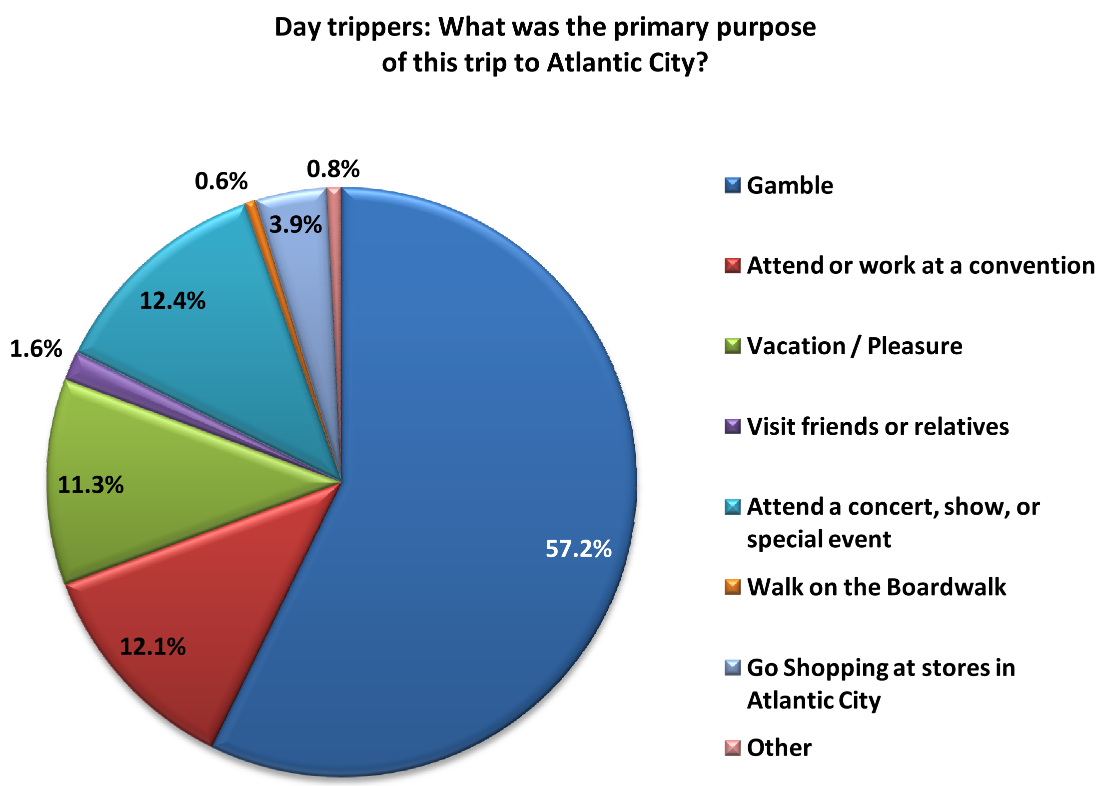
Overnight visitors: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.6%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	95.3%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	84.3%
% Likely to Revisit	Within Next 2 Yrs	86.7%
Those Who Would Recommend A.C. to others	% Yes	98.2%
Those who are currently visiting Atlantic City:	More Often	19.7%
	Less Often	3.0%

*Multiple modes exist. The smallest value is shown.

Day Trippers

Survey respondents who are not spending the night in Atlantic City on this trip make up 46% of the actual survey data, or a total of 1,425 individual responses. Day trippers visit very frequently, are more likely than overnight visitors to arrive in Atlantic City via bus (26.9%) and are less likely to play at more than one casino. The reasons they come are primarily to gamble (57.2%) but also to attend a concert, show or special event (12.1%), or to go shopping at stores in Atlantic City (3.9%).

Figure 51 – Day Tripper Primary Trip Purpose



Day trippers spend less, with a median spending figure of $262 per trip because they stay for a shorter period and engage in fewer recreational activities overall. They are the segment most reflective of the typical visitor because they make up the majority of visitors.

Figure 52 – Day-Tripper Segment Profile

Key numeric measures: Day-trip Visitors (1,425 responses)	Mean	Median	Mode
Age	51	52	52
No. of annual visits	19.3	10	12
Meals eaten	1.6	1	1
Casinos Gambled During Visit	1.8	2	1
Loyalty Cards Carried	2.7	2	2
Hours Gambling	5.3	5	5
Nights Stayed	0.0	0	0
Total Hours in Atlantic City	9.7	8	8
Adults in Party	2.6	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	2.0	1	0
Planning Days	16.1	7	7

Day-trippers: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$272	$344	$150	$200	$0	$200
F&B	$46	$62	$25	$40	$0	$50
Shopping	$47	$140	$0	$100	$0	$100
Entertainment	$24	$153	$0	$100	$0	$100
Lodging	$0	$0	$0	$0	$0	$0
Travel	$23	$26	$10	$10	$0	$5
Total Spending	$414	$416	$262	$262	$200*	$200*

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Day-trippers: key trip characteristics	Category	Percentage
Travel Mode	Car	71.9%
	Bus	26.9%
	Other	1.2%
Stay Overnight	Overnight Guest	0.00%
	Day Tripper	100.0%
Those Who are Traveling as Part of Package	% Yes	6.7%

Day-trippers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	22.8%
Marital Status	Married	49.8%
	Single	37.7%
Education	High school graduate or less	34.2%
	College graduate or more	36.6%
Empty Nester	Children <18	26.9%
Employment	Full-Time	59.0%
	Retired	24.2%
Occupation	Professional/Tech	42.8%
Household Income	% Under $100K	80.3%
	% Over $100K	13.5%
Ethnicity	White/Caucasian	68.2%
	African American	22.3%
	Asian	4.9%
	Hispanic	3.9%
Gender	Male	38.6%
	Female	61.4%

Day-trippers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	73.1%
	Tables	8.9%
	Both	16.6%
	Poker	0.7%
	Other	0.2%
Member of Player Loyalty Club	% Yes	70.7%
% Who Gamble Elsewhere	% Yes	28.1%

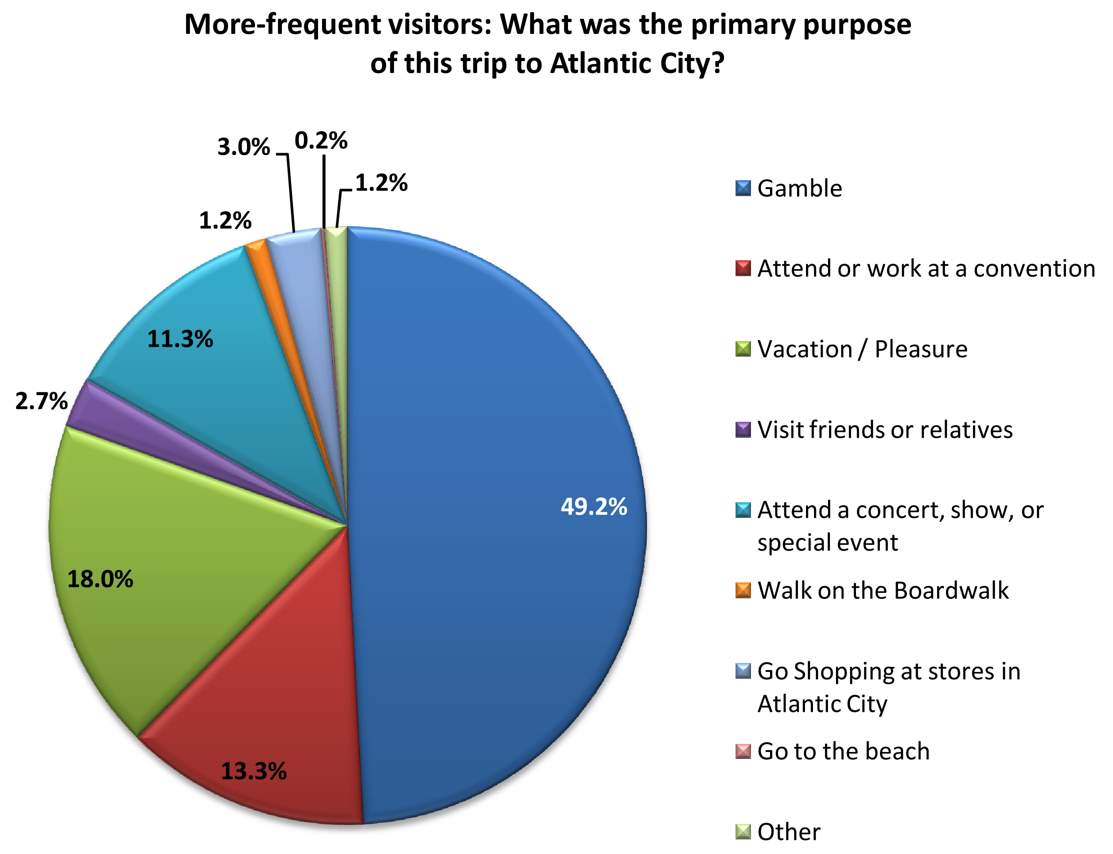
Day-trippers: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	93.0%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	95.3%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	80.8%
% Likely to Revisit	Within Next 2 Yrs	87.7%
Those Who Would Recommend Atlantic City to others	% Yes	98.4%
Those who are currently visiting Atlantic City:	More Often	19.7%
	Less Often	3.6%

*Multiple modes exist. The smallest value is shown.

Visitors Coming More Often

Survey respondents who say they are coming to Atlantic City more frequently than they did in the past make up 19.3% of the complete survey, or a total of 598 responses. Survey respondents who currently visiting more often are less motivated by gambling (49.2%) and more likely to be general tourists (vacation/pleasure 18.0%), attending a concert or special event (11.3%), or to go shopping (3.0%). A complete list of primary trip purpose for visitation trending to higher frequency is contained in the following chart.

Figure 53 – More-Frequent Visitor Primary Trip Purpose



Visitors coming more often are likely to be members of a casino player loyalty club (73.2%). However, the fact that a smaller proportion are coming to gamble indicates that non-gaming attractions are exerting a stronger influence in motivating increased visitation. This segment also appears to be highly mobile, visiting other overnight destinations relatively frequently (mean trips 4.08) and often gambling during these trips (40.0%).

They are slightly younger than the overall profile, with a median age of 49 and usually female (64.7%). They are relatively well off, with 19% making more than $100,000 annually; well educated, with 43.4% graduating college or above; and reflect a moderate economic value, with a median spending amount of $467. Slightly more than half will stay overnight (53.3%). Most importantly, visitors trending to more frequent visitation are highly likely to recommend Atlantic City to friends and family, with a rating of 99.5% in the affirmative.

Figure 54 – More Frequent Visitor Segment Profile

Key numeric measures: More Frequent Visitors (598 responses)	Mean	Median	Mode
Age	49	49	39
No. of annual visits	15.3	6	1
Meals eaten	3.7	2	1
Casinos Gambled During Visit	2.3	2	2
Loyalty Cards Carried	3.0	2	2
Hours Gambling	14.1	6	6
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	36.1	24	48
Adults in Party	2.7	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	4.1	2	0
Planning Days	22.6	14	30

More-frequent visitors: spending per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$465	$546	$200	$300	$0	$200
F&B	$103	$127	$50	$73	$0	$100
Shopping	$101	$211	$0	$150	$0	$100
Entertainment	$41	$173	$0	$100	$0	$100
Lodging	$52	$424	$0	$300	$0	$300
Travel	$48	$54	$18	$20	$0	$5
Total Spending	$809	$809	$467	$467	$200*	$200*

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

More-frequent visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	77.6%
	Bus	17.6%
	Other	4.8%
Stay Overnight	Overnight Guest	53.3%
	Day Tripper	46.2%
Those Who are Traveling as Part of Package	% Yes	20.5%

More-frequent visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	23.7%
Marital Status	Married	55.8%
	Single	35.7%
Education	High school graduate or less	28.8%
	College graduate or more	43.4%
Empty Nester	Children <18	29.4%
Employment	Full-Time	63.4%
	Retired	19.7%
Occupation	Professional/Tech	51.3%
Household Income	% Under $100K	75.8%
	% Over $100K	19.1%
Ethnicity	White/Caucasian	70.7%
	African American	19.3%
	Asian	3.9%
	Hispanic	5.4%
Gender	Male	35.3%
	Female	64.7%

More-frequent visitors: Gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	64.9%
	Tables	10.9%
	Both	21.4%
	Poker	1.8%
	Other	0.2%
Member of Player Loyalty Club	% Yes	73.2%
% Who Gamble Elsewhere	% Yes	40.0%

More-frequent visitors: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	91.6%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.0%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	81.5%
% Likely to Revisit	Within Next 2 Yrs	89.4%
Those Who Would Recommend A.C. to others	% Yes	99.5%
Those who are currently visiting Atlantic City:	More Often	100.0%
	Less Often	0.0%

*Multiple modes exist. The smallest value is shown.

The reasons these visitors give for why they visit more often were detailed earlier in the report but should be revisited in context of this segment. The most frequently cited reasons for visiting Atlantic City more frequently are strongly correlated with new attractions (19.5%) and more available activities in general (28.4%). Other reasons include more available time (18.6%), more money (5.7%), simple personal enjoyment (5.0%) and better comps (4.4%). Both more frequent and less frequent visitors are explored in greater depth in the segmentation analysis found later in this report.

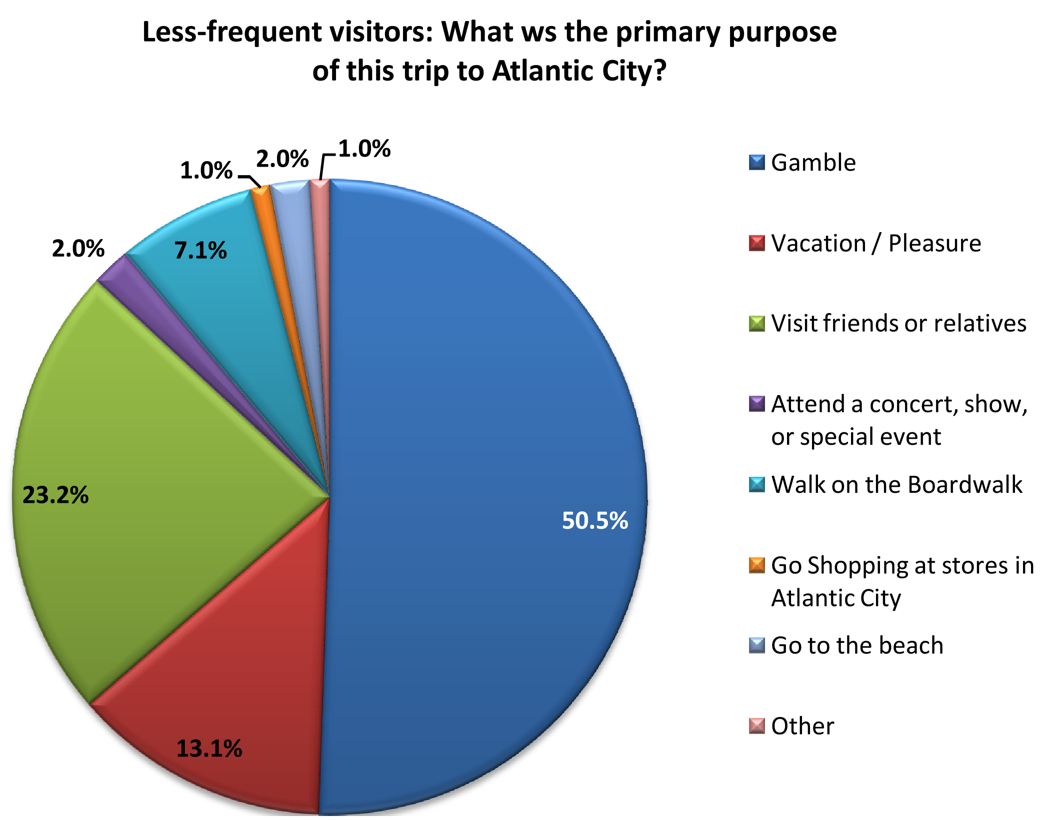
Figure 55 – Reasons for Coming to Atlantic City More Often

More-frequent visitors: reasons cited	No. of responses	Percent
More Things To Do	244	28.4%
New/Better Attractions (Net)	167	19.5%
New Shopping Attractions	78	9.1%
New Casino Attractions	43	5.0%
New Dining Attractions	23	2.7%
Better Nightlife and Entertainment	23	2.7%
More Time	160	18.6%
More Money	49	5.7%
Personal Enjoyment	43	5.0%
Better Comps	38	4.4%
Other	35	4.1%
Come with Friends	26	3.0%
Positive Previous Experience	17	2.0%
Moved Closer	16	1.9%
Availability of Rooms	16	1.9%
Travel Easier Now	15	1.7%
See the Sights	13	1.5%
Now Retired	10	1.2%
See Family	9	1.0%
Total	858	100.0%

Visitors Coming Less Often

Survey respondents who are coming to Atlantic City less frequently than in the past make up only 3.2% of the complete survey or a total of exactly 100 responses. The small size of this segment means that these responses are less statistically significant than those of most other segments but they are important for profiling who is coming to the resort less often than previously and why. Survey respondents who are currently visiting less often are somewhat less motivated by gambling (50.5%) than the total sample and tend more toward general tourism, with vacation/pleasure listed at 23.2% of responses. A complete list of primary trip purpose for less frequent visitors is documented below.

Figure 56 – Less Frequent Visitor Primary Trip Purpose



Less-frequent visitors display many similarities with the overall sample, especially in the areas of visitation frequency, age and ethnicity. They also display similarities with the more frequent segment in the areas of visitation mode, casino games played, gender, income and education levels. Less-frequent visitors are primarily different in that they are substantially less satisfied with the city, displaying a low overall satisfaction rating at 76.0% in the two top boxes and similarly low ratings for Atlantic City being perceived as a more attractive (84.5% positive) or a safe (74.7% positive) destination. However, despite these low satisfaction ratings, 94.9% of the visitors now coming less frequently would recommend Atlantic City to their friends or family.

Importantly, less-frequent visitors reflect a slightly greater economic value than more-frequent visitors, with a higher median spending amount ($505 vs. $467) per trip, with most of the difference showing in gambling budgets. In addition, less-frequent visitors are slightly more likely to be day trippers (51.0%), slightly more likely to be poker players (4.1%), slightly more likely to be African American (23.7%), and slightly more likely to be female (69.0%) than more frequent visitors, although these are not significant differences. They report lower satisfaction levels than most visitors at 76% positive and a high proportion (50.6%) also gamble elsewhere.

Most importantly, less-frequent visitors are also highly mobile (mean trips elsewhere 3.67) and they are the segment most likely to have gambled elsewhere (50.6%). It is also important to note that, while this segment represents only a small proportion of the intercept survey, it is logical to assume that they may be under-represented in the sample due to the intercept methodology. In other words, if these visitors are coming less frequently and visiting other destinations more frequently, there is a lower probability that they will be intercepted and surveyed in Atlantic City.

Interestingly, while claiming that they are currently visiting less frequently than they did in the past, this segment continues to visit, with a relatively high frequency. They report a median six visits annually, which matched the median for more frequent visitors, although the mean annual visitation rate is lower than more frequent visitors by two points (13.0% vs. 15.3%). Less frequent visitors also display intent to return to Atlantic City (89.0% within the next 24 months) almost equal to that of more frequent visitors (89.4%).

Figure 57 – Less-Frequent Visitor Segment Profile

Key numeric measures: Less-Frequent Visitors (100 responses)			
	Mean	**Median**	**Mode**
Age	51	52	53
No. of annual visits	13.0	6	1
Meals eaten	4.2	2	1
Casinos Gambled During Visit	2.2	2	2
Loyalty Cards Carried	3.5	2	1
Hours Gambling	14.8	6	4
Nights Stayed	2.3	2	2
Total Hours in Atlantic City	30.2	12	6
Adults in Party	2.7	2	2
No. of Those Under 21 in Party	0.3	0	0
Overnight Trips to Other Destinations	3.7	2	0
Planning Days	17.2	7	30

Less-frequent visitors: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$493	$609	$200	$250	$0	$200
F&B	$81	$120	$30	$100	$0	$100*
Shopping	$95	$242	$0	$200	$0	$200
Entertainment	$32	$140	$0	$100	$0	$50*
Lodging	$14	$355	$0	$385	$0	$199*
Travel	$47	$57	$15	$21	$0	$5
Total Spending	$762	$794	$505	$507	$0	$100*

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Less-frequent visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	77.0%
	Bus	20.0%
	Other	3.0%
Stay Overnight	Overnight Guest	49.0%
	Day Tripper	51.0%
Those Who are Traveling as Part of Package	% Yes	32.6%

Less-frequent visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	24.0%
Marital Status	Married	49.0%
	Single	39.0%
Education	H.S. graduate or less	29.0%
	College graduate or more	50.0%
Empty Nester	Children <18	27.0%
Employment	Full-Time	60.0%
	Retired	22.0%
Occupation	Professional/Tech	65.9%
Household Income	% Under $100K	71.0%
	% Over $100K	18.0%
Ethnicity	White/Caucasian	63.9%
	African American	23.7%
	Asian	4.1%
	Hispanic	5.2%
Gender	Male	31.0%
	Female	69.0%

Less-frequent visitors: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	62.2%
	Tables	10.8%
	Both	23.0%
	Poker	4.1%
	Other	0.0%
Member of Player Loyalty Club	% Yes	68.7%
% Who Gamble Elsewhere	% Yes	50.6%

Less-frequent visitors: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	76.0%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	84.5%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	74.7%
% Likely to Revisit	Within Next 2 Yrs	89.0%
Those Who Would Recommend Atlantic City to others	% Yes	94.9
Those who are currently visiting Atlantic City:	More Often	0.0%
	Less Often	100.0%

*Multiple modes exist. The smallest value is shown.

The reasons these visitors give for why they come less frequently were detailed earlier in the report but again should be revisited in context of this segment. The reasons cited for coming less frequently are led by less time (20.8%), less money (18.3%), and moving farther away (9.2%). Going other places represents almost one-tenth of the response (9.2%) in this segment and is indicative of the wider availability of gaming in the regional market. Similarly, a small minority (5.8%) says that travel is more difficult now, which may be an indication of the higher cost of gasoline. Encouragingly, only a small proportion (5.8%, respectively) claim that there are currently fewer things to do or they are currently receiving worse comps to account for reduced visitation.

Figure 58 – Reasons for Coming to Atlantic City Less Often

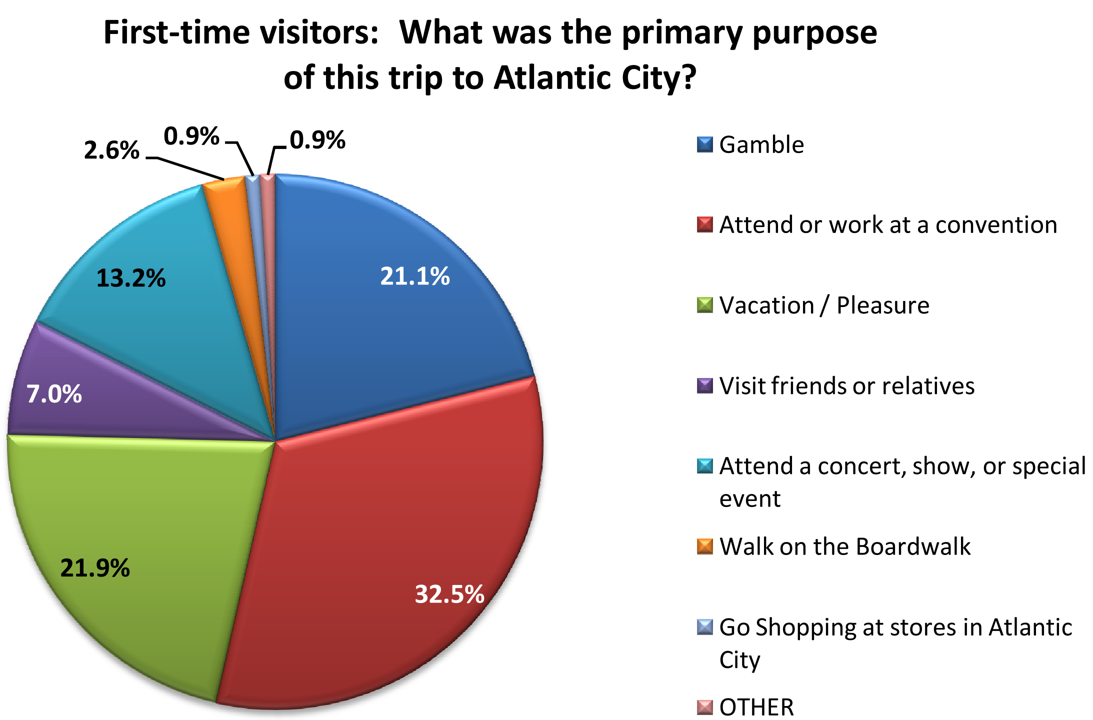
Less-frequent visitors: reasons cited	No. of Responses	Percent
Less Time	25	20.8%
Less Money	22	18.3%
Moved Farther Away	11	9.2%
Going Other Places	11	9.2%
Other	8	6.7%
Less Things To Do	7	5.8%

Less-frequent visitors: reasons cited	No. of Responses	Percent
Worse Comps	7	5.8%
Travel More Difficult Now	7	5.8%
Work	5	4.2%
No New Attractions	4	3.3%
No Personal Enjoyment	4	3.3%
Un-Availability of Rooms	3	2.5%
Negative Previous Experience	3	2.5%
Friends not Available to Travel With	3	2.5%
Total	120	100.0%

First-Time Visitors

Survey respondents who said that this is their first visit to Atlantic City are also a small segment, 3.7% of the survey, or a total of 114 responses. First-time visitors are most likely to visit Atlantic City to attend a convention or trade show (32.5%) or for vacation/pleasure (21.9%) than to gamble (21.1%). Other prominent reasons for coming to Atlantic City are to attend a concert, show or special event (13.2%), or to visit friends or relatives (7.0%). Frequent visitors are not profiled separately because this segment makes up such a large proportion of the sample that their responses are virtually identical to the overall survey results.

Figure 59 – First-Time Visitor Primary Trip Purpose



First-time visitors are the youngest segment, with a median age of 38 years old. They are also the segment least likely to travel by car or bus and most likely to travel by air (24.6%). They are well educated (55.7% college or above) and have a high economic value, with a median spending figure of $614 even though their income level is moderate, with only 14.3% making more than $100,000 annually. This segment is much more likely to be working full time (74.1%) than retired (8.0%) and it is equally divided between males and females. As a segment they are highly likely to stay overnight (71.9%) and most likely to list the Internet as the most important trip planning information source. Most importantly, first-time visitors appear equally satisfied with Atlantic City as the more frequent regular visitors (92.7% positive).

Figure 60 – First-Time Visitor Segment Profile

Key numeric measures: First-Time Visitors (114 responses)			
	Mean	**Median**	**Mode**
Age	39	38	44*
No. of annual visits	1.0	1	1
Meals eaten	7.3	5	1
Casinos Gambled During Visit	2.3	2	2
Loyalty Cards Carried	1.1	1	1
Hours Gambling	13.1	5	4
Nights Stayed	3.1	3	2
Total Hours in Atlantic City	54.4	48	96
Adults in Party	2.9	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	1.7	1	0
Planning Days	35.6	30	30

First-time visitors: spending per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$278	$364	$100	$200	$0	$200
F&B	$191	$210	$100	$150	$100*	$100*
Shopping	$133	$214	$50	$100	$0	$100
Entertainment	$47	$200	$0	$150	$0	$100
Lodging	$75	$370	$0	$350	$0	$300*
Travel	$135	$155	$30	$35	$0	$20
Total Spending	$859	$867	$614	$620	$50*	$50*

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

First-time visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	64.0%
	Bus	11.4%
	Other	24.6%
Stay Overnight	Overnight Guest	71.9%
	Day Tripper	28.1%
Those Who are Traveling as Part of Package	% Yes	20.0%

First-time visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	31.0%
Marital Status	Married	52.2%
	Single	45.1%
Education	High school graduate or less	23.9%
	College graduate or more	55.7%
Empty Nester	Children <18	31.9%
Employment	Full-Time	74.1%
	Retired	8.0%
Occupation	Professional/Tech	60.0%
Household Income	% Under $100K	83.0%
	% Over $100K	14.3%
Ethnicity	White/Caucasian	74.3%
	African American	15.0%
	Asian	5.3%
	Hispanic	3.5%
Gender	Male	50.0%
	Female	50.0%

First-time visitors: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	71.4%
	Tables	9.5%
	Both	19.0%
	Poker	0%
	Other	0%
Member of Player Loyalty Club	% Yes	21.2%
% Who Gamble Elsewhere	% Yes	33.3%

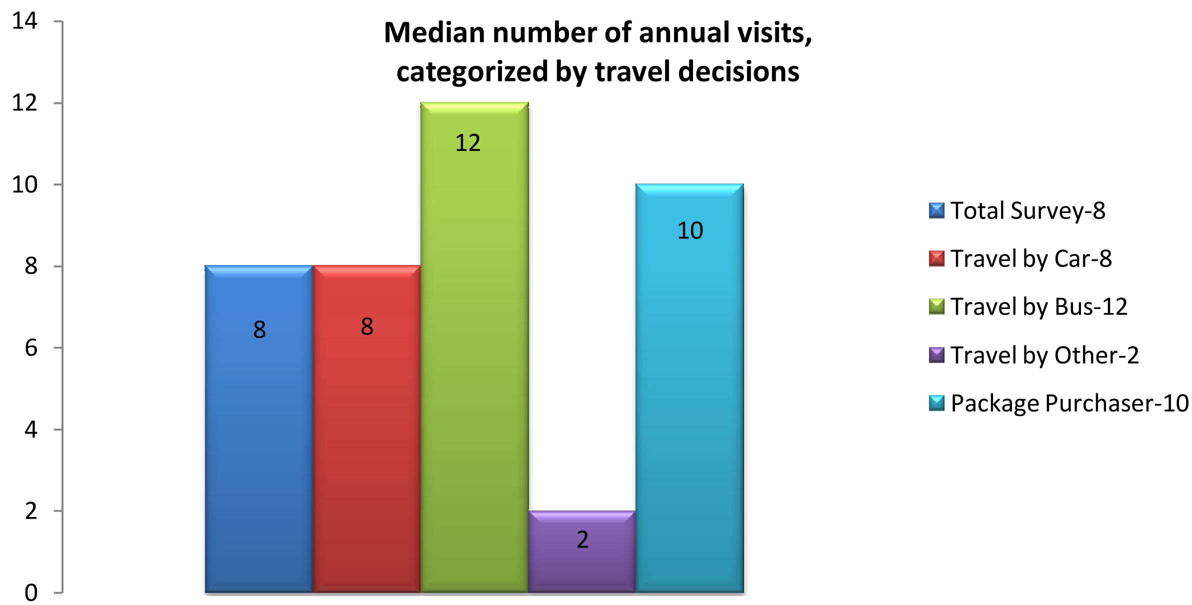
First-time visitors: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	93.7%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	92.7%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	89.0%
% Likely to Revisit	Within Next 2 Yrs	51.8%
Those Who Would Recommend Atlantic City to others	% Yes	94.6
Those who are currently visiting Atlantic City:	More Often	18.8%
	Less Often	0.9%

*Multiple modes exist. The smallest value is shown.

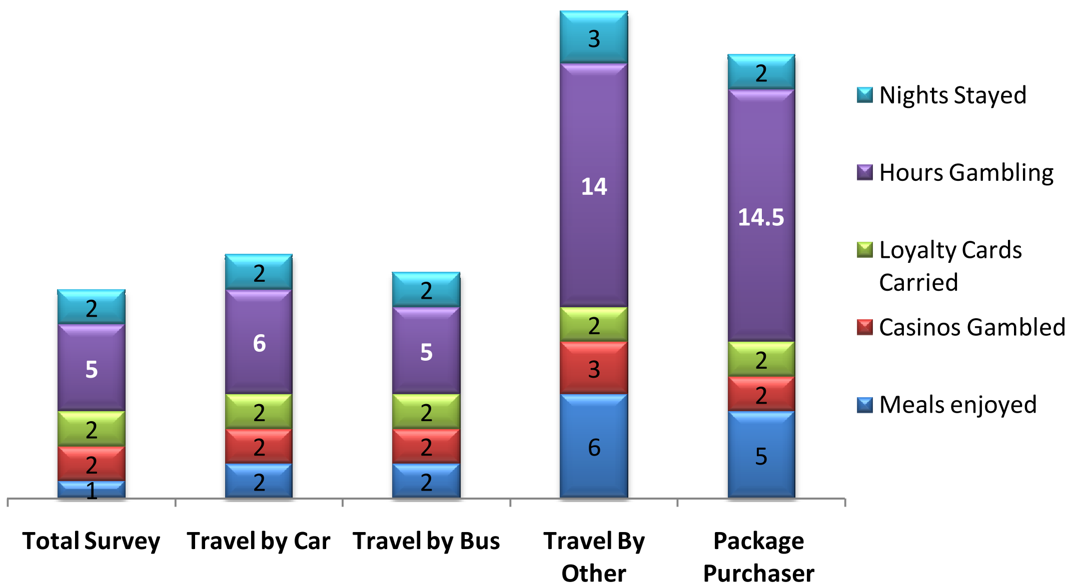
Segment Comparisons – Behavioral Segments

The following tables summarize and compare key measures between the important behavioral segments of travel mode (car, bus, "other") and package purchaser.

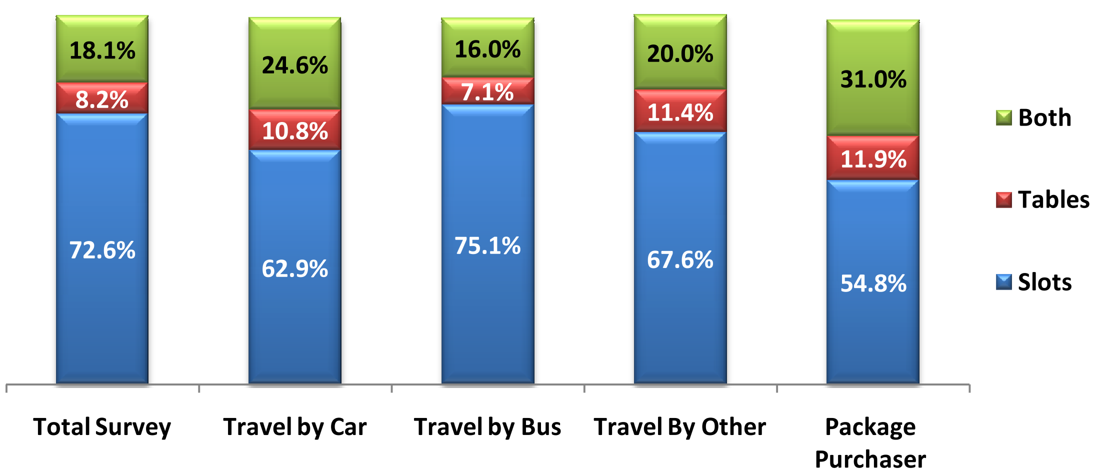
Figure 61 – Segments Median Annual Visits by Mode of Travel



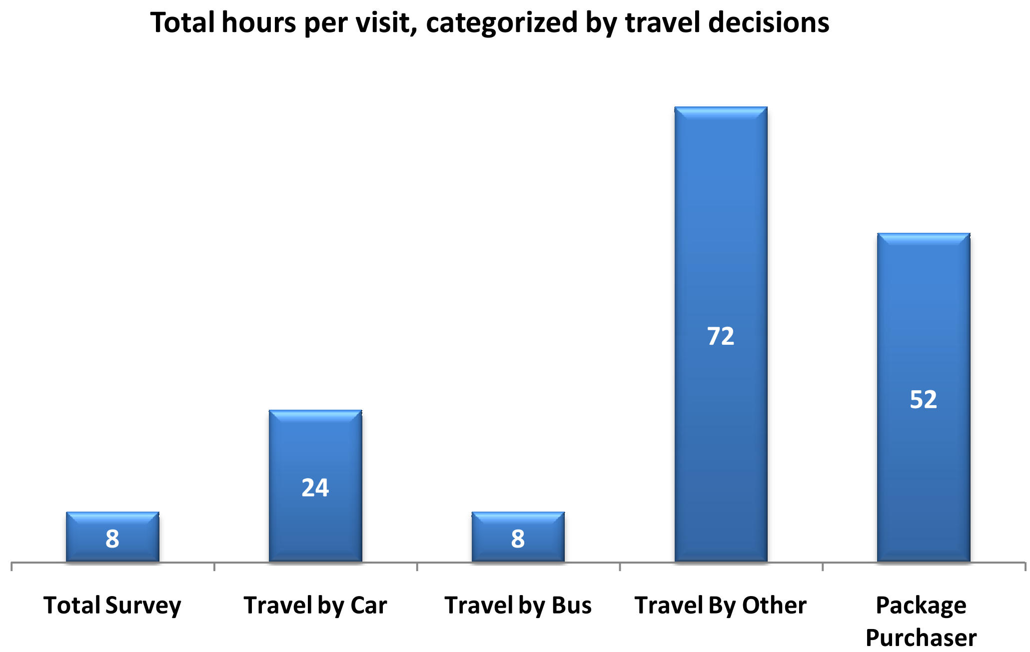
Key metrics, categorized by travel decisions

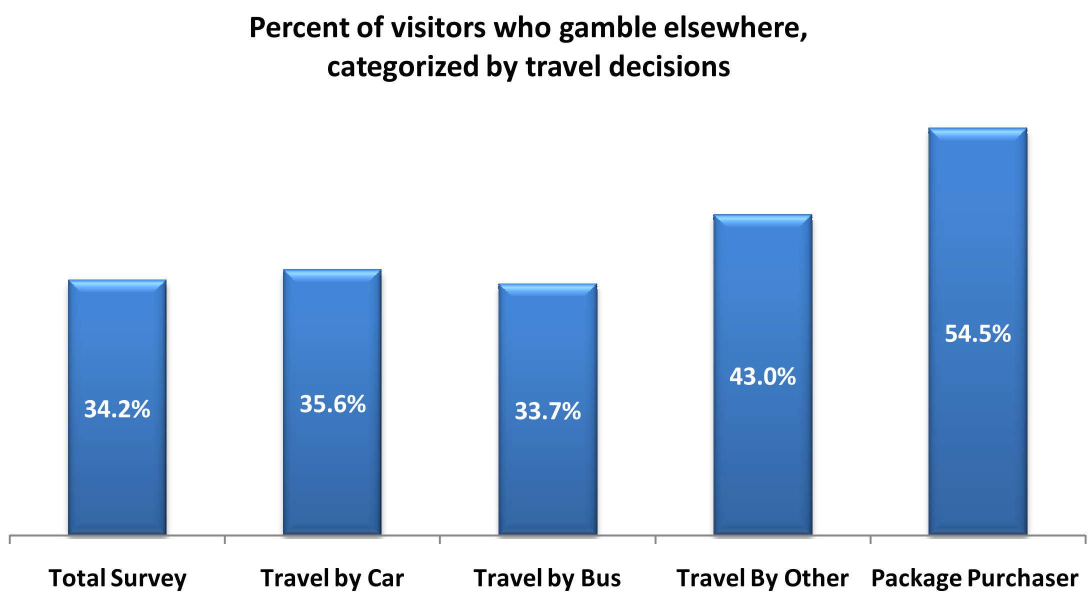


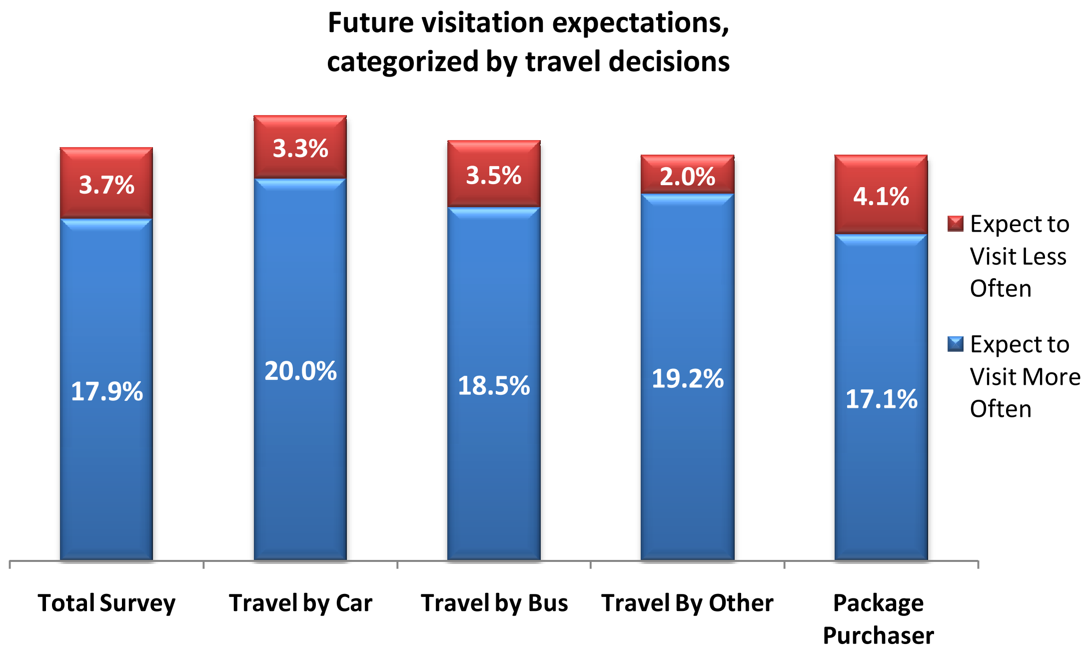
Type of games played, categorized by travel decisions*



* Poker did not register more than 1.1% in any category


Total hours per visit, categorized by travel decisions
8
24
8
72
52
Total Survey
Travel by Car
Travel by Bus
Travel By Other
Package Purchaser

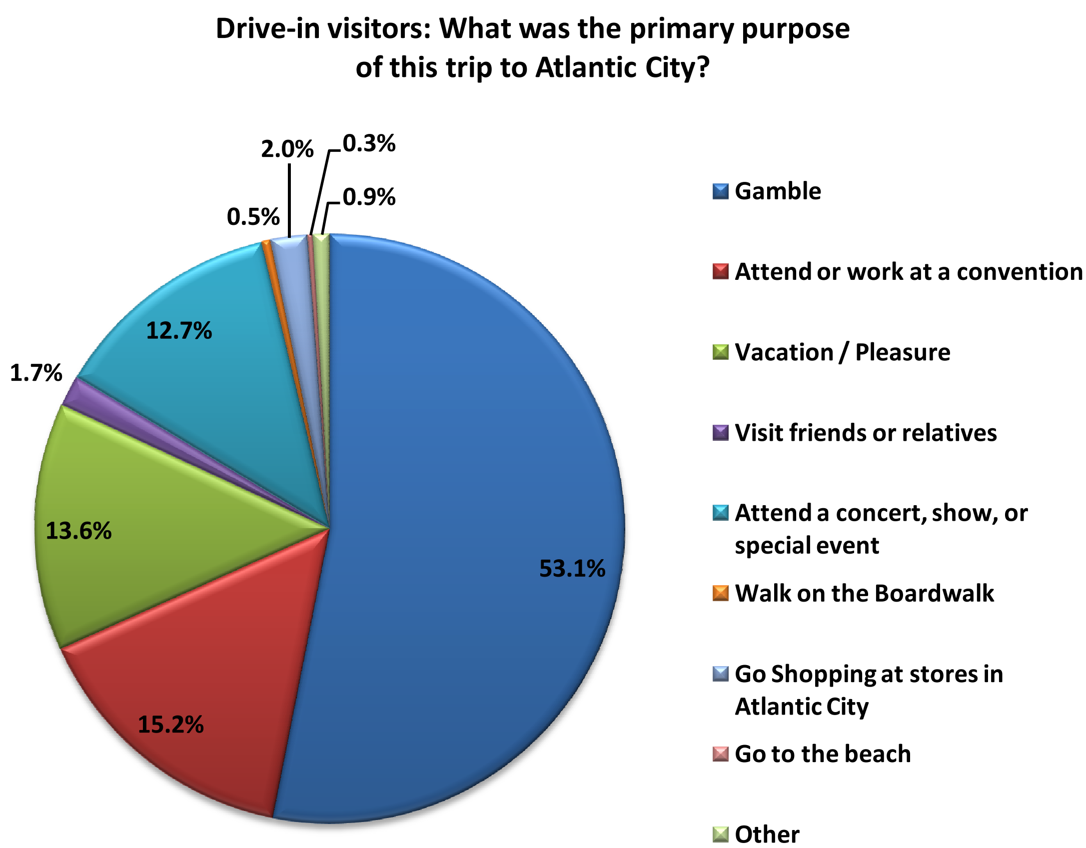

Percent of visitors who gamble elsewhere, categorized by travel decisions
34.2%
35.6%
33.7%
43.0%
54.5%
Total Survey
Travel by Car
Travel by Bus
Travel By Other
Package Purchaser



Travel by Car

Visitors who travel to Atlantic City by car make up 76.4% of all responses, or a total of 2,368 individuals. Because this segment is so large, responses generally mirror the overall sample results. The reasons cited for visiting Atlantic City follow this pattern, generally imitating the overall results with slightly higher representation for attending a convention or trade show (15.2%) and attending a concert, show or special event (12.7%), and slightly lower representation for general tourist or vacation/pleasure (13.6%).

Figure 62 – Travel by Car Segment Primary Trip Purpose



Drive-in visitors as a whole spend moderately, displaying a median total spending amount of $503, but they visit relatively frequently, with a median trip frequency of eight times annually. This segment's gaming share of spending mirrors the overall survey, with a median amount of $200. They have a two-week trip planning horizon, often stay overnight (55.9%), and spend a median of 24 hours in the city during their trip. Drive-in visitors are marginally younger than the survey sample (median age 51), relatively well educated (45.4% college grad or greater), are usually female (58.0%), white (77.2%), and 20.2% earn more than $100,000 annually.

Almost three-quarters of travel by car visitors gamble (73.4%) and they will play in at least two casinos during their stay. The majority that gambles spend a median six hours gambling with two-thirds (62.9%) playing slots, one-tenth (10.8%) playing tables, and one-quarter (24.6%) playing both slots and table games.

Figure 63 – Travel by Car Segment Profile

Key numeric measures: Visitors Who Travel by Car (2,368 responses)	Mean	Median	Mode
Age	50	51	52
No. of annual visits	16.3	8	12
Meals eaten	3.8	2	1
Casinos Gambled During Visit	2.1	2	2
Loyalty Cards Carried	2.9	2	2
Hours Gambling	12.1	6	5
Nights Stayed	2.3	2	2
Total Hours in Atlantic City	35.8	24	48
Adults in Party	2.5	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	2.9	1	0
Planning Days	23.4	14	7

Drive-in visitors: Spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Median, not counting 0
Gambling	$522	$616	$200	$300	$0	$500
F&B	$94	$131	$50	$80	$0	$100
Shopping	$90	$204	$0	$150	$0	$100
Entertainment	$43	$198	$0	$100	$0	$100
Lodging	$37	$342	$0	$260	$0	$300
Travel	$35	$40	$10	$12	$5	$5
Total Spending	$822	$825	$503	$503	$505	$505

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Drive-in visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	100.0%
	Bus	0.0%
	Other	0.0%
Stay Overnight	Overnight Guest	55.9%
	Day Tripper	43.3%
Those Who are Traveling as Part of Package	% Yes	22.2%

Drive-in visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	23.9%
Marital Status	Married	60.8%
	Single	30.8%
Education	High school graduate or less	27.3%
	College graduate or more	45.4%
Empty Nester	Children <18	26.1%
Employment	Full-Time	62.5%
	Retired	19.9%
Occupation	Professional/Tech	50.9%
Household Income	% Under $100K	73.7%
	% Over $100K	20.2%
Ethnicity	White/Caucasian	77.2%
	African American	14.5%
	Asian	4.5%
	Hispanic	3.3%
Gender	Male	42.0%
	Female	58.0%

Drive-in visitors: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	62.9%
	Tables	10.8%
	Both	24.6%
	Poker	1.1%
	Other	0.1%
Member of Player Loyalty Club	% Yes	73.0%
% Who Gamble Elsewhere	% Yes	35.6%

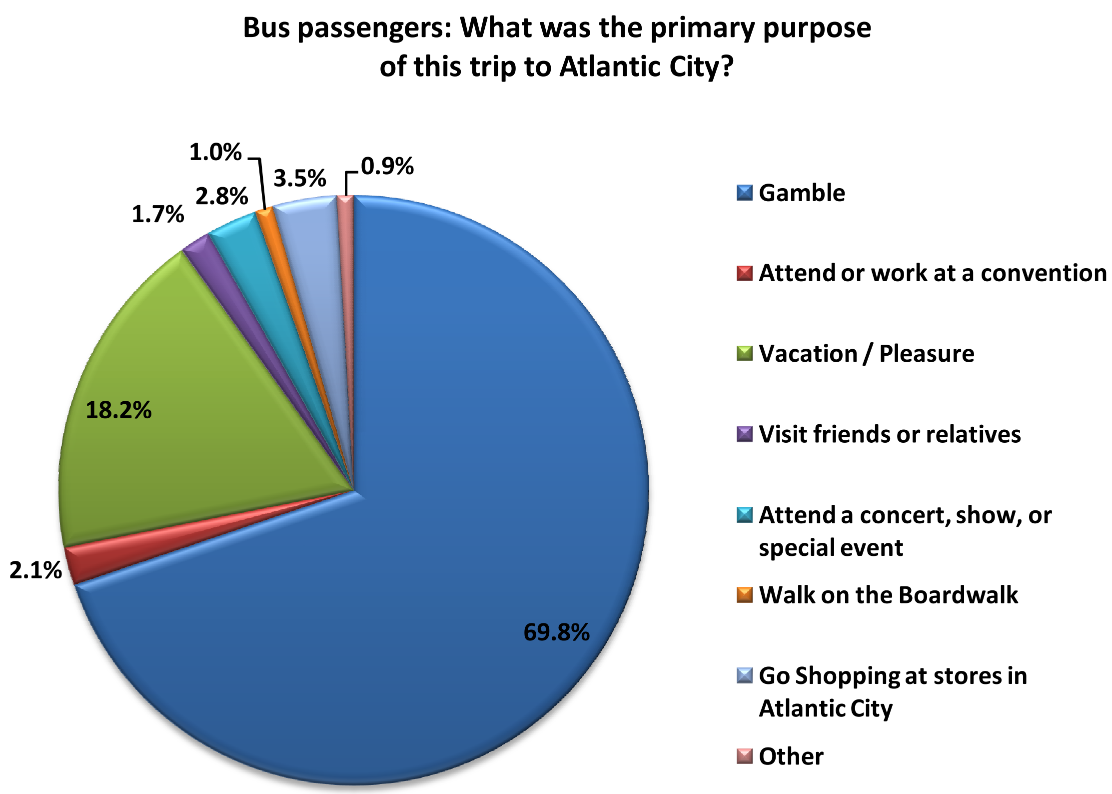
Drive-in visitors: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	93.8%
Those Who View Atlantic City as ‘More Attractive’	Agree/Strongly Agree	95.1%
Those Who View Atlantic City as ‘Safe’	Agree/Strongly Agree	83.0%
% Likely to Revisit	Within Next 2 Yrs	87.7%
Those Who Would Recommend Atlantic City to others	% Yes	98.4%
Those who are currently visiting Atlantic City:	More Often	20.0%
	Less Often	3.3%

*Multiple modes exist. The smallest value is shown.

Travel by Bus

Visitors who travel to Atlantic City by bus comprise 18.5% of all responses, or a total of 574 individual responses. Bus travelers are much more strongly motivated to visit Atlantic City in order to gamble than the larger survey population (69.8%). They also represent a larger proportion of the general tourist segment (18.2). Note that bus visitors are broken out between day-trip and overnight following this section.

Figure 64 – Travel by Bus Primary Trip Purpose



Bus travelers visit Atlantic City more frequently than drive-in visitors (median 12 annual trips vs. 8), but they do not stay nearly as long (median 8 hours in Atlantic City vs. 24), they gamble for fewer hours (median 5 vs. 6), and spend significantly less than visitors who come by car. Bus travelers are generally older than drive-in visitors, lower income, more often unmarried (50.9%), and much more strongly female than those who come by car. The median age for bus travelers is 54 vs. 51 for drive-in visitors, only 29.3% are college graduates or higher compared to a total of 45.4% for car travelers, and the proportion of females among bus travelers is significantly higher at 70.7% vs. 58.0% for those who travel by car.

Bus visitors overall spend somewhat less than other segments, with a median spending figure of $341 per trip, compared to $503 for drive-in visitors. Bus travelers are also relatively less affluent than drive-in, with only 4.9% making more than $100,000 annually, vs. 20.2% earning at this level among drive-in visitors.

Bus travelers are significantly less likely to stay overnight than drive-in visitors (33.3% vs. 55.9%), but they are equally likely to gamble in other destinations (33.7% and 35.6%, respectively). Both segments are well satisfied with Atlantic City, posting high satisfaction ratings and identical proportions (98.4%) would recommend Atlantic City to friends and family.

Figure 65 – Travel by Bus Segment Profile

Bus travelers: Key numeric measures: Visitors Who Travel by Bus (574 responses)	Mean	Median	Mode
Age	54	54	59
No. of annual visits	20.0	12	12
Meals eaten	2.7	2	1
Casinos Gambled During Visit	2.1	2	2
Loyalty Cards Carried	2.9	2	2
Hours Gambling	10.6	5	4
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	24.7	8	7
Adults in Party	3.1	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	1.7	0	0
Planning Days	16.4	7	7

Bus travelers: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$459	$490	$200	$200	$200	$200
F&B	$52	$75	$25	$40	$0	$50
Shopping	$76	$188	$0	$100	$0	$100
Entertainment	$11	$124	$0	$100	$0	$100
Lodging	$14	$253	$0	$200	$0	$200*
Travel	$43	$45	$28	$30	$32	$32
Total Spending	$654	$654	$341	$341	$230	$230

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Bus travelers: key trip characteristics	Category	Percentage
Travel Mode	Car	0.0%
	Bus	100.0%
	Other	0.0%
Stay Overnight	Overnight Guest	33.3%
	Day Tripper	66.7%
Those Who are Traveling as Part of Package	% Yes	23.3%

Bus travelers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	21.6%
Marital Status	Married	34.1%
	Single	50.9%
Education	High school graduate or less	46.7%
	College graduate or more	29.3%
Empty Nester	Children <18	20.7%
Employment	Full-Time	50.1%
	Retired	32.9%
Occupation	Professional/Tech	38.5%
Household Income	% Under $100K	89.1%
	% Over $100K	4.9%
Ethnicity	White/Caucasian	47.1%
	African American	41.5%
	Asian	5.9%
	Hispanic	4.5%
Gender	Male	29.3%
	Female	70.7%

Bus travelers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	75.1%
	Tables	7.1%
	Both	16.0%
	Poker	1.0%
	Other	0.4%
Member of Player Loyalty Club	% Yes	76.1%
% Who Gamble Elsewhere	% Yes	33.7%

Bus travelers: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	93.5%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.2%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	82.9%
% Likely to Revisit	Within Next 2 Yrs	90.6%
Those Who Would Recommend Atlantic City to others	% Yes	98.4%
Those who are currently visiting Atlantic City:	More Often	18.5%
	Less Often	3.5%

*Multiple modes exist. The smallest value is shown.

Overnight Bus Visitors vs. Day Trip Bus Visitors

One unexpected result of the 2008 VPS was a strong showing for overnight visitors among bus travelers. We know that overnight visitors were more inclined to complete the questionnaire due to the length of the survey, but, surprisingly, one-third of the 574 bus travelers (33.3%) interviewed stayed overnight during their trips to Atlantic City. An analysis of overnight and day-trip sub-segments of the bus traveler behavioral segment follows.

Like all bus visitors, both overnight and day-trip sub-segments come to Atlantic City often and usually for the purpose of gambling. More than two-thirds of all bus passengers (69.5%) cite gambling as their primary reason for visiting Atlantic City, as do the overnight (70.2%) and day-trip (69.2%) sub-components. The second-most important reason for visiting among both segments is vacation/pleasure (19.9% and 17.2%, respectively). All other motivations make up only a small minority of bus traveler responses, although day-trip bus travelers do display a wider range of other reasons for visiting the city. Both sub-segments display strong female, African American, single, and retiree representation.

Overnight bus visitors remain in Atlantic City seven times longer than day-trip bus visitors (50 hours vs. 7 hours), spend three times longer gambling (12 hours vs. 4 hours), and as a result have a total spending figure that is almost three times larger on a median basis ($780 vs. $260).

Overnight Bus Visitors

Overnight bus visitors are more valuable than day-trip bus visitors as a travel segment because they stay longer in Atlantic City and as a result spend much more during a typical trip. They are somewhat younger than day-trip bus passengers (median 52 vs. 56), and more likely to smoke, to play table games, to belong to a casino player loyalty club, and to have gone to college than day-trip bus visitors.

Figure 66 – Overnight Bus Traveler Primary Trip Purpose

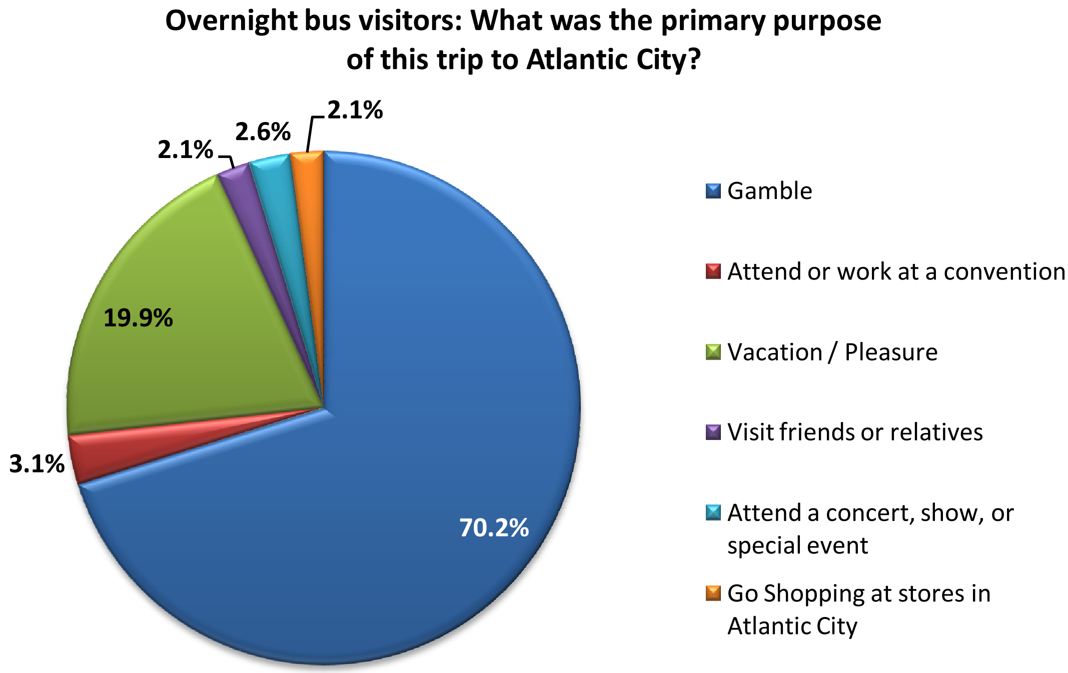


Figure 67 – Overnight Bus Visitor Sub-Segment Profile

Key numeric measures: Overnight bus visitors (191 responses)			
	Mean	**Median**	**Mode**
Age	51	52	65*
No. of annual visits	19.6	12	12
Meals eaten	5.2	4	3
Casinos Gambled During Visit	2.6	2	2
Loyalty Cards Carried	3.2	2.5	2
Hours Gambling	21.4	12	5
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	59.0	50	48
Adults in Party	3.3	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	2.1	1	0
Planning Days	18.9	7	7

Overnight bus visitors: spend per visit*	Mean, counting 0	Mean,not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$829	$879	$500	$500	$500	$500
F&B	$93	$148	$40	$100	$0	$200
Shopping	$117	$265	$0	$200	$0	$200
Entertainment	$19	$119	$0	$100	$0	$200
Lodging	$41	$259	$0	$200	$0	$200*
Travel	$66	$71	$32	$32	$32	$32
Total Spending	$1,164	$1,164	$780	$780	$390*	$390*

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Overnight bus visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	0.0%
	Bus	100.0%
	Other	0.0%
Stay Overnight	Overnight Guest	100.0%
	Day Tripper	0.0%
Those Who are Traveling as Part of Package	% Yes	23.3%

Overnight bus visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	26.7%
Marital Status	Married	38.2%
	Single	51.8%
Education	High school graduate or less	35.6%
	College graduate or more	41.9%
Empty Nester	Children <18	18.8%
Employment	Full-Time	59.5%
	Retired	23.7%
Occupation	Professional/Tech	48.0%
Household Income	% Under $100K	84.7%
	% Over $100K	9.5%
Ethnicity	White/Caucasian	47.4%
	African American	40.0%
	Asian	6.3%
	Hispanic	5.3%
Gender	Male	32.5%

Overnight bus visitors: demographic characteristics	Category	Percentage
	Female	67.5%

Overnight bus visitors: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	67.1%
	Tables	10.2%
	Both	21.6%
	Poker	1.2%
	Other	0.0%
Member of Player Loyalty Club	% Yes	80.5%
% Who Gamble Elsewhere	% Yes	43.0%

Overnight bus visitors: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	91.6%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	95.8%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	84.8%
% Likely to Revisit	Within Next 2 Yrs	92.7%
Those Who Would Recommend Atlantic City to others	% Yes	99.0%
Those who are currently visiting Atlantic City:	More Often	22.9%
	Less Often	4.3%

*Multiple modes exist. The smallest value is shown.

Day-trip Bus Visitors

Day-trip bus visitors come just as frequently as overnight bus travelers, but they stay only a fraction as long and as a result spend far less during a trip. They tend to be older, earn less, and reflect somewhat lower education levels than the typical Atlantic City visitor. Shoppers compose twice the proportion of day-trip bus visitors as they make up in the overall survey. More detailed characteristics are as follows:

Figure 68 – Day-Trip Bus Visitor Primary Trip Purpose

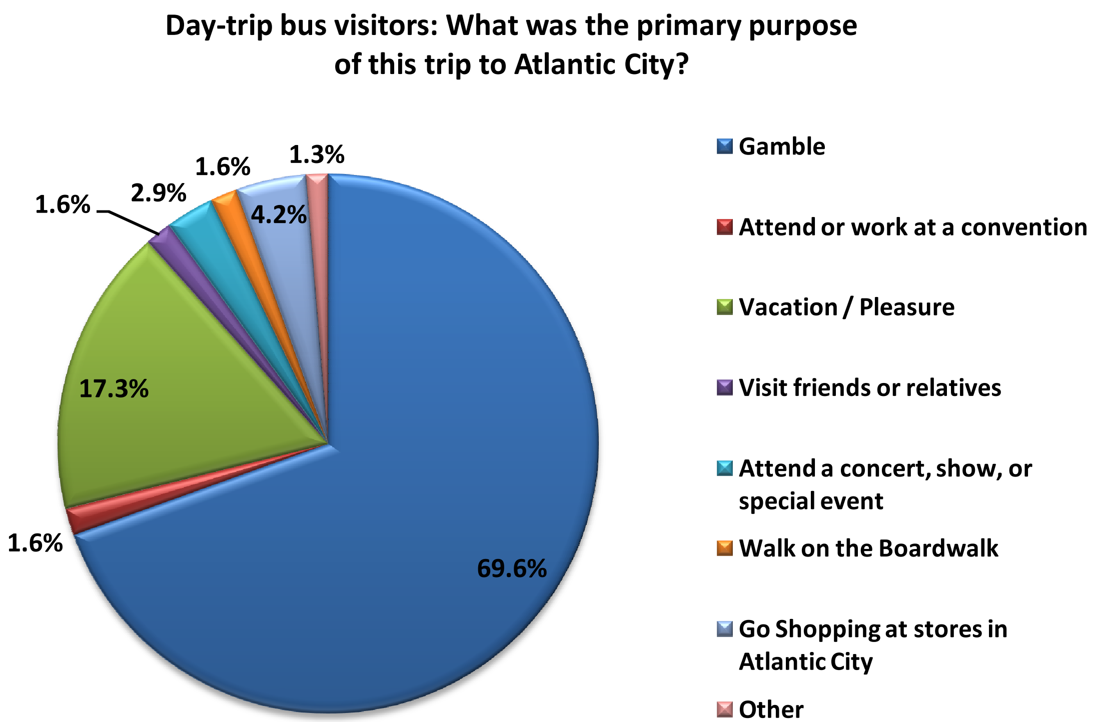


Figure 69 – Day-Trip Bus Visitor Sub-Segment Profile

Key numeric measures: Day-trip bus visitors (383 responses)			
	Mean	**Median**	**Mode**
Age	56	56	69
No. of annual visits	20.2	12	12
Meals eaten	1.4	1	1
Casinos Gambled During Visit	1.8	2	1
Loyalty Cards Carried	2.7	2	1*
Hours Gambling	5.0	4	4
Nights Stayed	0	0	0
Total Hours in Atlantic City	7.8	7	7
Adults in Party	3.0	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other	1.5	0	0

Key numeric measures: Day-trip bus visitors (383 responses)			
Destinations			
Planning Days	15.1	7	7

Day-trip bus visitors: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$275	$294	$200	$200	$200	$200
F&B	$31	$43	$20	$30	$0	$20
Shopping	$56	$144	$0	$100	$0	$100
Entertainment	$6	$133	$0	$73	$0	$100
Lodging	$0	$0	$0	$0	$0	$0
Travel	$31	$32	$25	$25	$25	$25
Total Spending	$400	$400	$260	$260	$230	$230

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Day-trip bus visitors: key trip characteristics	Category	Percentage
Travel Mode	Car	0.0%
	Bus	100.0%
	Other	0.0%
Stay Overnight	Overnight Guest	0.0%
	Day Tripper	100.0%
Those Who are Traveling as Part of Package	% Yes	0.0%

Day-trip bus visitors: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	19.1%
Marital Status	Married	32.1%
	Single	50.4%
Education	High school graduate or less	52.2%
	College graduate or more	22.9%
Empty Nester	Children <18	21.7%
Employment	Full-Time	45.4%
	Retired	37.5%
Occupation	Professional/Tech	33.8%
Household Income	% Under $100K	91.4%
	% Over $100K	2.6%
Ethnicity	White/Caucasian	47.0%
	African American	42.3%

Day-trip bus visitors: demographic characteristics	Category	Percentage
	Asian	5.7%
	Hispanic	4.2%
Gender	Male	27.7%
	Female	72.3%

Day-trip bus visitors: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	79.4%
	Tables	5.4%
	Both	13.0%
	Poker	1.0%
	Other	0.6%
Member of Player Loyalty Club	% Yes	73.9%
% Who Gamble Elsewhere	% Yes	28.8%

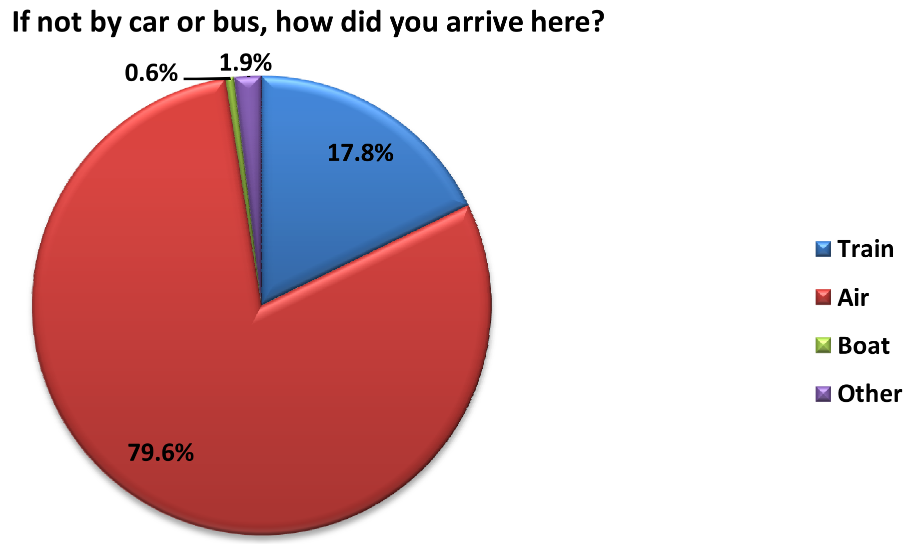
Day-trip bus visitors: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.5%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.3%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	81.9%
% Likely to Revisit	Within Next 2 Yrs	89.5%
Those Who Would Recommend Atlantic City to others	% Yes	98.2%
Those who are currently visiting Atlantic City:	More Often	16.3%
	Less Often	3.2%

*Multiple modes exist. The smallest value is shown.

Travel by "Other"

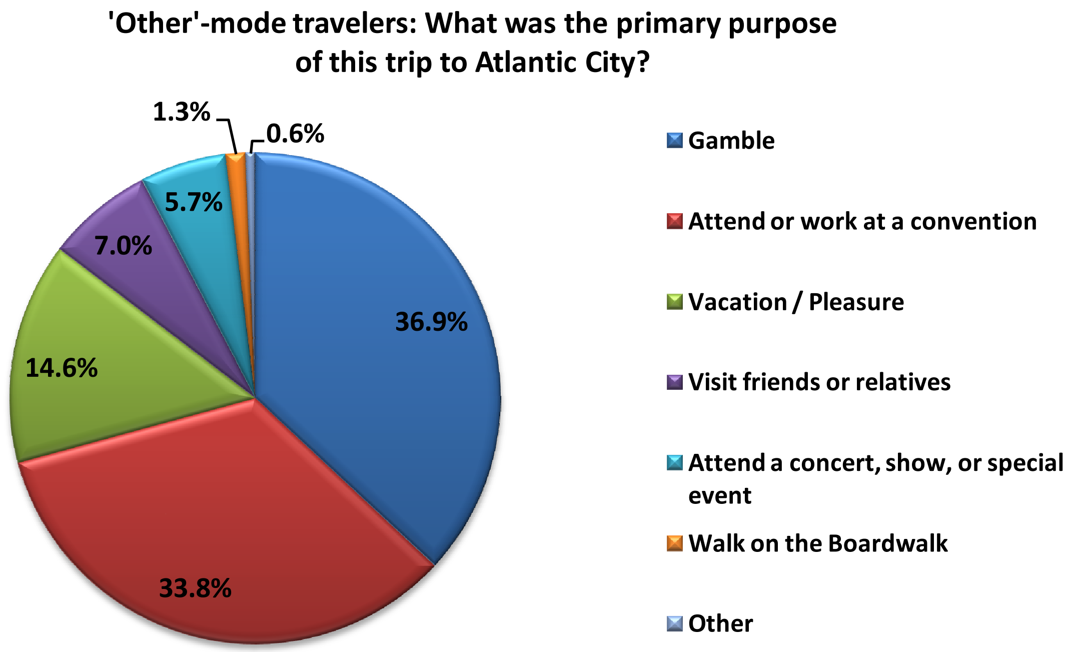
Visitors who travel to Atlantic City by "other" means comprise 5.1% of all responses, or a total of 157 individuals. "Other" modes of transportation are predominated by air travel (79.6%), followed by train (17.8%).

Figure 70 – Other Modes of Travel to Atlantic City



Visitors who do not travel by car or bus still come to Atlantic City primarily to gamble (36.9%), but at a significantly lower rate than found in the total sample. Fully one-third (33.8%) cite attending a convention or trade show as the primary reason for visiting Atlantic City, a much stronger representation of this segment than in the larger survey, and similarly, a substantially higher proportion cite visiting friends or relative as the primary reason for coming to the destination. Because the incidence of air travel is so high in this segment it is reasonable to assume, and ZIP Code analysis can confirm, that this segment resides at a much greater geographic distance from Atlantic City than any other segments in the survey.

Figure 71 – Travel by "Other" Primary Trip Purpose



Visitors who travel by other means display one of the highest spending profiles, with a median total spending figure or $1,150. This segment displays the highest spending on travel of any segment profiled in this report, with a median travel spend of $199. This segment also spends heavily on food and beverage (median $150), shopping (median $100). The reason for these higher spending levels is that "other" visitors also are significantly more likely to stay overnight (87.9%), and display the longest length of stay, with a median three nights stayed and 72 hours spent in the city. More than two-thirds in this segment gamble (66.9%), and these spend a median 14 hours gambling per trip, reflecting a high median gambling spend of $500. The game types they play mirror the larger survey, with a slight preference for table games (11.4%).

While per-trip spending for this segment is high, their visitation frequency is low, with a median of only two trips annually. Because "other" visitors are less frequent and less familiar with the city, they display relatively low rates of player loyalty club membership (51.6%), are less likely to revisit within the next two years (67.5%), are less likely to be familiar with the Atlantic City slogan (11.5%), and are less likely to perceive Atlantic City as a safe destination (79.1% positive).

Despite the high representation of convention attendees in this segment, the median age (51) is only slightly younger than the total survey and identical to drive-in visitors. This segment is well educated with more than half (51.6%) college graduates or above, currently working full time (65.0%), and often high income with 26.8% earning more than $100K annually. "Other" visitors display a higher proportion of males (43.9%) than most segments, and a high propensity to gamble at destinations other than Atlantic City (43.0%). This segment displays relatively high satisfaction with this destination, posting 94.9% positive ratings on overall satisfaction. They also perceive Atlantic City as more attractive, with a 96.1% positive rating, and fully 94.9% of these travel by "other" means visitors would recommend Atlantic City to friends or family members.

Figure 72 – Travel by "Other" Segment Profile

Key numeric measures: Visitors Who Travel by "other" (157 responses)	Mean	Median	Mode
Age	50	51	52
No. of annual visits	6.8	2	1
Meals eaten	9.0	6	6
Casinos Gambled During Visit	2.8	3	2
Loyalty Cards Carried	2.1	2	1
Hours Gambling	22.7	14	4
Nights Stayed	3.2	3	2
Total Hours in Atlantic City	71.2	72	72
Adults in Party	2.5	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	5.1	2	0
Planning Days	50.9	30	30

Travelers by other means: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$955	$1,172	$400	$500	$0	$500
F&B	$188	$238	$150	$200	$0	$200
Shopping	$185	$262	$100	$200	$0	$100*
Entertainment	$64	$273	$0	$100	$0	$100
Lodging	$102	$399	$0	$300	$0	$800
Travel	$236	$296	$199	$250	$0	$400
Total Spending	$1,731	$1,731	$1,150	$1,150	$500*	$500*

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Travelers by other means: key trip characteristics	Category	Percentage
Travel Mode	Car	0.0%
	Bus	0.0%
	Other	100.0%
Stay Overnight	Overnight Guest	87.9%
	Day Tripper	10.8%
Those Who are Traveling as Part of Package	% Yes	35.6%

Travelers by other means: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	24.8%
Marital Status	Married	57.7%
	Single	35.9%
Education	High school graduate or less	24.2%
	College graduate or more	51.6%
Empty Nester	Children <18	22.4%
Employment	Full-Time	65.0%
	Retired	17.2%
Occupation	Professional/Tech	52.9%
Household Income	% Under $100K	66.2%
	% Over $100K	26.8%
Ethnicity	White/Caucasian	76.3%
	African American	19.9%
	Asian	3.2%
	Hispanic	0.6%
Gender	Male	43.9%
	Female	56.1%

Travelers by other means: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	67.6%
	Tables	11.4%
	Both	20.0%
	Poker	0.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	51.6%
% Who Gamble Elsewhere	% Yes	43.0%

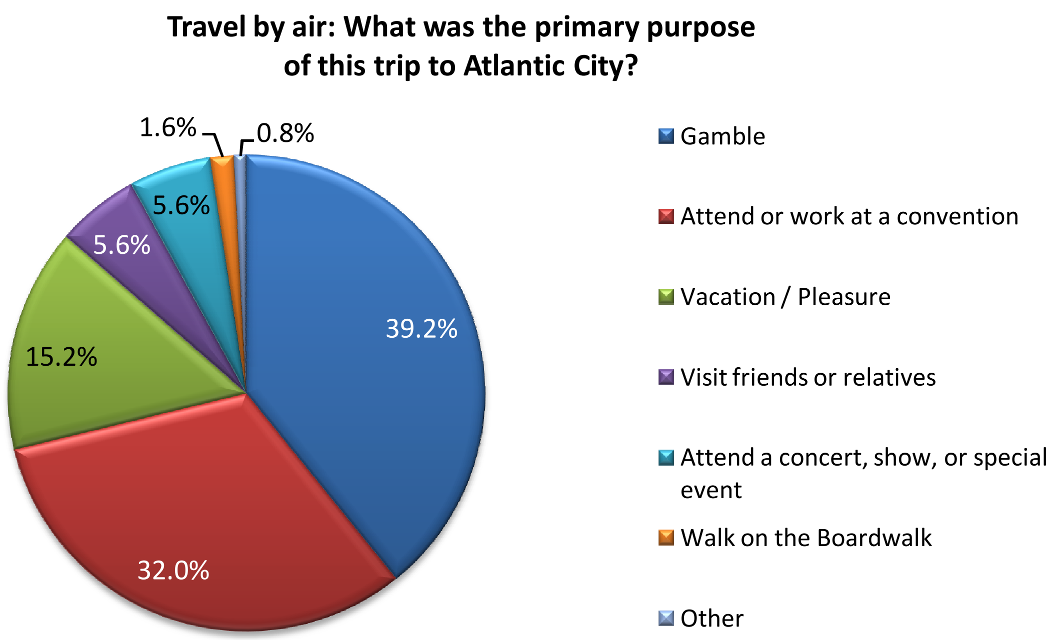
Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.9%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.1%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	79.1%
% Likely to Revisit	Within Next 2 Yrs	67.5%
Those Who Would Recommend Atlantic City to others	% Yes	94.9%
Those who are currently visiting Atlantic City:	More Often	19.2%
	Less Often	2.0%

*Multiple modes exist. The smallest value is shown.

Travel by Air Segment

Visitors who travel by air are the single most valuable tourism segment in the 2008 Atlantic City VPS, with a median total spending figure of $1,300. Unfortunately, this is also a small segment, totaling only 125 responses, or 4% of all survey responses. The main reason air travelers come to Atlantic City is still gambling but at a much lower proportion than more frequent visitors (39.2%). A close second motivation is attending a convention, trade show, or business meeting, totaling almost one-third of all reasons (32.0%), followed more distantly in third place by general tourism (15.2%).

Figure 73 – Travel by Air Segment Primary Trip Purpose



Air travelers almost always stay overnight (93.6%) and generally exhibit extended stays remaining in the city a median two nights and staying a median of 72 hours per trip. These longer trips mean that air travelers will eat more meals in Atlantic City (median six), and gamble longer (median 15 hours) in more casinos (median three). Air travelers as a group wager at high levels (median $500 gambling budget) and also spend relatively large amounts on food and beverage, shopping, and entertainment in addition to having the highest travel spending figure (median $200). Air travelers also reflect higher income levels than other travel segments, with 29.6 percent earning over $100,000 annually.

However, while per trip spending is very high and this segment exhibits favorable demographics the frequency of visitation is quite low at a median 2 trips annually. Air travelers consequently represent an opportunity for Atlantic City to increase visitation in this valuable travel segment.

Figure 74 – Travel by Air Segment Profile

Key numeric measures: Travel by Air Segment (125 responses)	Mean	Median	Mode
Age	52	52	52
No. of annual visits	4.2	2	1
Meals eaten	9.7	6	6
Casinos Gambled During Visit	2.8	3	2
Loyalty Cards Carried	2.3	2	1
Hours Gambling	24.1	15	15
Nights Stayed	3.3	3	2
Total Hours in Atlantic City	75.9	72	72
Adults in Party	2.6	2	2
No. of Those Under 21 in Party	.07	0	0
Overnight Trips to Other Destinations	5.9	2	0
Planning Days	57.3	30	30

Travel by air: spending per visit*	Mean, counting 0	Mean not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$1,119	$1,333	$500	$600	$0	$1,000
F&B	$204	$263	$150	$200	$200	$200
Shopping	$206	$276	$100	$200	$0	$200
Entertainment	$56	$234	$0	$100	$0	$100
Lodging	$87	$361	$0	$300	$0	$500
Travel	$249	$335	$200	$270	$0	$400
Total Spending	$1,921	$1,921	$1,300	$1,300	$500*	$500*

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Travel by air: key trip characteristics	Category	Percentage
Travel Mode	Car	0.0%
	Bus	0.0%
	Other	100.0%
Stay Overnight	Overnight Guest	93.6%
	Day Tripper	5.6%
Those Who are Traveling as Part of Package	% Yes	35.7%

Travel by air: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	25.6%
Marital Status	Married	58.9%
	Single	33.9%
Education	HS Graduate or >	23.2%
	College Grad or >	53.6%
Empty Nester	Children <18	22.6%
Employment	Full-Time	59.2%
	Retired	20.8%
Occupation	Professional/Tech	56.9%
Household Income	% Under $100K	63.2%
	% Over $100K	29.6%
Ethnicity	White/Caucasian	78.2%
	African American	16.9%
	Asian	4.0%
	Hispanic	0.8%
Gender	Male	44.8%
	Female	55.2%

Travel by air: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	66.7%
	Tables	11.5%
	Both	20.7%
	Poker	0.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	55.2%
% Who Gamble Elsewhere	% Yes	46.8%

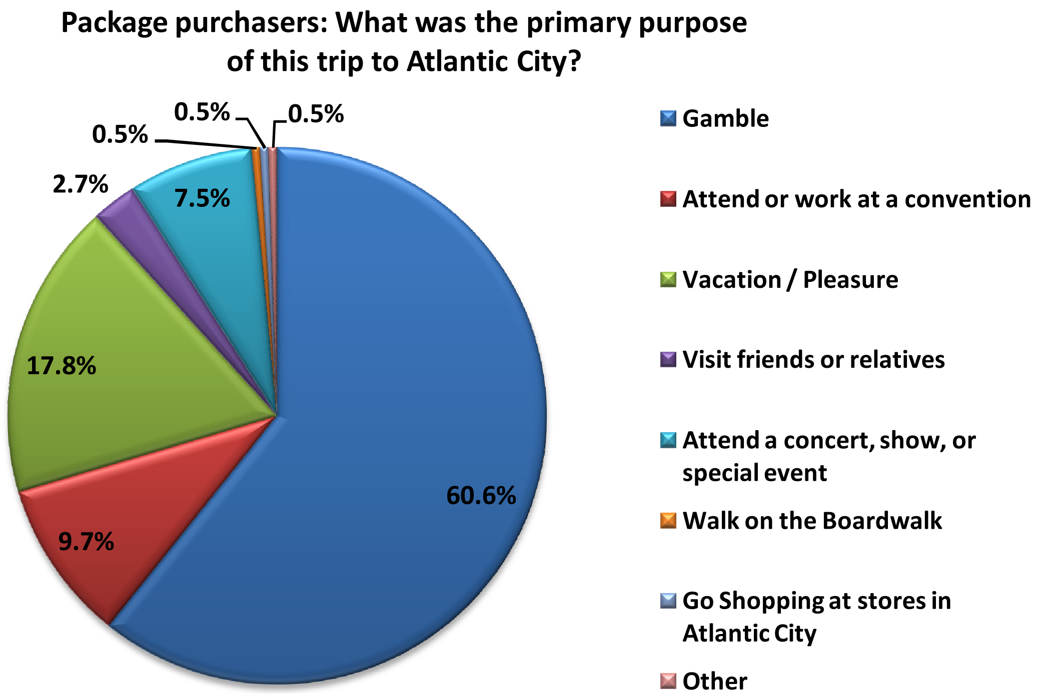
Travel by air: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.4%
Those Who View Atlantic City as ‘More Attractive’	Agree/Strongly Agree	96.7%
Those Who View Atlantic City as ‘Safe’	Agree/Strongly Agree	77.7%
% Likely to Revisit	Within Next 2 Yrs	67.2%
Those Who Would Recommend Atlantic City to others	% Yes	94.4%
Those Currently Visiting Atlantic City:	More Often	20.0%
	Less Often	1.7%

*Multiple modes exist. The smallest value is shown.

Package Purchasers

Package purchasers make up 12.0% of all responses, or a total of 372 individuals. While this segment is relatively small, it is valuable because package purchasers exhibit longer stays and are one of the highest-spending travel segments analyzed in the survey. The reasons package purchasers come to Atlantic City strongly favor gambling (60.6%) and vacation/pleasure or general tourist (17.8%), although some also come to attend a convention or trade show (9.7%) or to attend a concert, show, or special event (7.5%).

Figure 75 – Package Purchaser Primary Trip Purpose



Package purchasers are an important travel segment due to their frequent visitation, long length of stay, high spending levels, and high satisfaction with the destination. Package purchasers visit Atlantic City almost as frequently as the full survey sample (median 10 annual visits vs. 12 for the weighted survey) and, due to the travel activity that defines this segment, they are extremely likely to stay overnight (99.5%). As a result package purchasers stay longer than most segments, with a median two-night stay and median 52 hours per trip. Due to this long length of stay, package purchasers spend almost as much as “other” means travelers, with a median total spending figure of $1,004 per trip. A high proportion of package purchasers (83.3%) gamble in the casinos and due to their longer stays this segment also gambles a high median 14.5 hours and spends a median $500 on gambling during their trip. High proportions (84.9%) of package purchasers are members of casino player loyalty programs.

Package purchasers are generally older (median age 53), more often married (65.0%), less strongly female (58.2%), and less likely to play slots exclusively (54.8%) than the total sample. They are highly educated, with almost half (49.3%) being college graduates or above and, while reflecting relatively high retirement levels (29.9%), they continue to earn high income, with one-fifth (20.0%) making $100,000 or more annually. Package purchasers are also one of the segments most familiar with the destination and are significantly more likely to know the Atlantic City slogan (29.5%) than other segments.

This economically valuable package purchaser segment is quite familiar with other resort destinations, making a high number of overnight trips to destinations other than Atlantic City (mean 4.75, median 2 trips annually) and frequently gambling (54.5%) during those trips. However, they reflect high overall satisfaction with Atlantic City (94.6% positive), strong repeat visitation intent (93.5% returning within the next two years), and a high proportion (98.1%) will recommend Atlantic City to friends and family.

Figure 76 – Package Purchaser Segment Profile

Key numeric measures: Visitors Who Travel by "other" (372 responses)			
	Mean	**Median**	**Mode**
Age	54	53	52
No. of annual visits	18.6	10	12
Meals eaten	6.3	5	6
Casinos Gambled During Visit	2.6	2	2
Loyalty Cards Carried	3.1	2	2
Hours Gambling	23.6	14.5	24
Nights Stayed	2.7	2	2
Total Hours in Atlantic City	59.6	52	72
Adults in Party	3.0	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	4.8	2	0
Planning Days	27.1	14	30

Package purchasers: Spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$1,067	$1,118	$500	$600	$500*	$500*
F&B	$118	$207	$50	$200	$0	$200
Shopping	$128	$264	$0	$200	$0	$200
Entertainment	$42	$254	$0	$130	$0	$800
Lodging	$38	$367	$0	$265	$0	$800*
Travel	$70	$78	$20	$24	$0	$20
Total Spending	$1,463	$1,463	$1,004	$1,004	$500*	$500*

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Package purchasers: key trip characteristics	Category	Percentage
Travel Mode	Car	75.3%
	Bus	11.8%
	Other	12.9%
Stay Overnight	Overnight Guest	99.5%
	Day Tripper	0.5%
Those Who are Traveling as Part of Package	% Yes	100.0%

Package purchasers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	24.0%
Marital Status	Married	65.0%
	Single	31.2%
Education	High school graduate or less	31.5%
	College graduate or more	49.3%
Empty Nester	Children <18	19.7%
Employment	Full-Time	53.9%
	Retired	29.9%
Occupation	Professional/Tech	64.0%
Household Income	% Under $100K	75.1%
	% Over $100K	20.0%
Ethnicity	White/Caucasian	74.1%
	African American	17.8%
	Asian	4.6%
	Hispanic	3.0%
Gender	Male	41.8%
	Female	58.2%

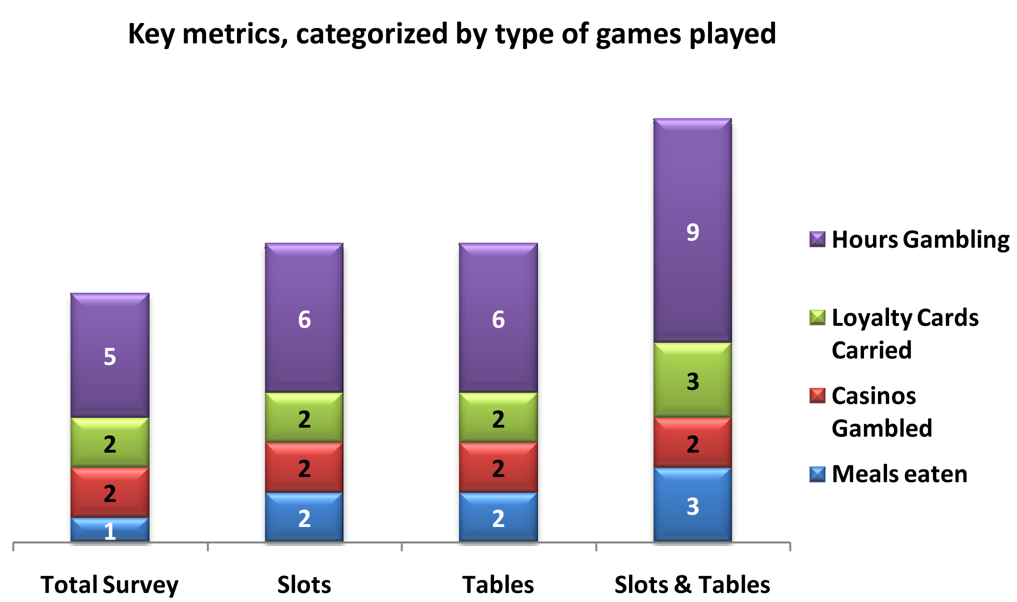
Package purchasers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	54.8%
	Tables	11.9%
	Both	31.0%
	Poker	1.0%
	Other	0.3%
Member of Player Loyalty Club	% Yes	84.9%
% Who Gamble Elsewhere	% Yes	54.5%

Package purchasers: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.6%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	95.7%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	90.0%
% Likely to Revisit	Within Next 2 Yrs	93.5%
Those Who Would Recommend Atlantic City to others	% Yes	98.1%
Those who are currently visiting Atlantic City:	More Often	17.1%
	Less Often	4.1%

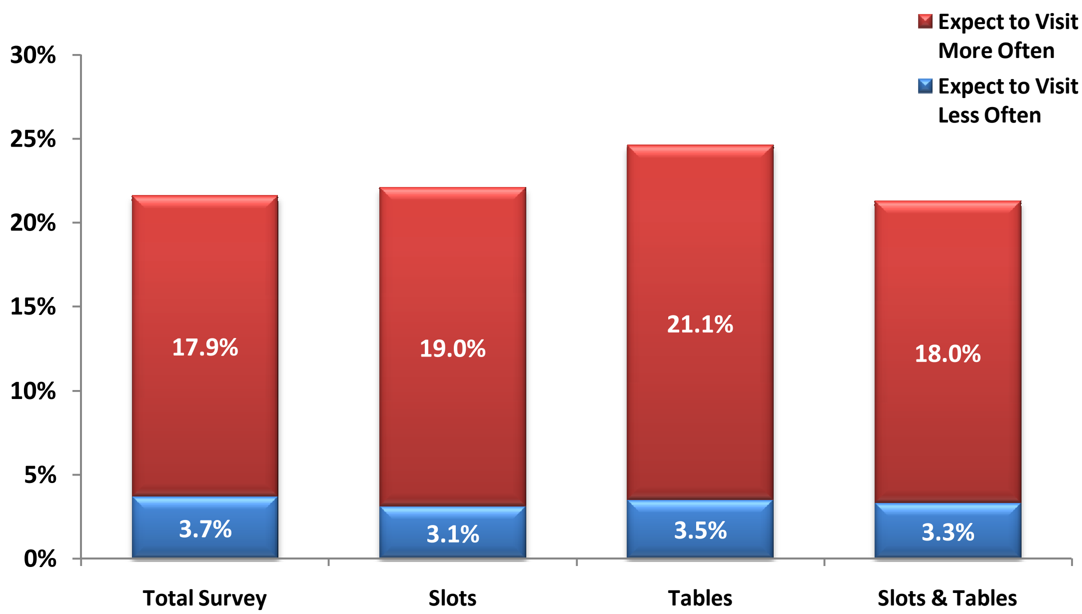
*Multiple modes exist. The smallest value is shown.

Segment Comparisons – Gambling Preferences

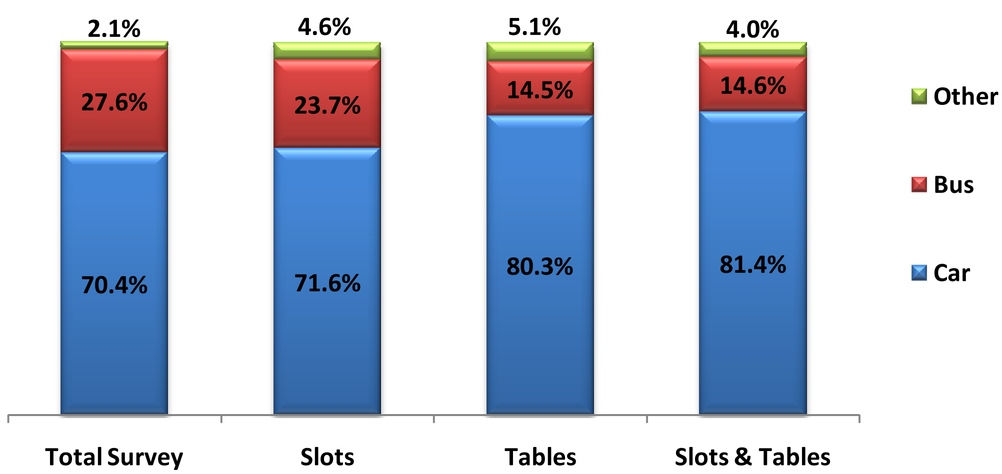
Figure 77 – Behavioral Segments Summary: Casino Game Preferences

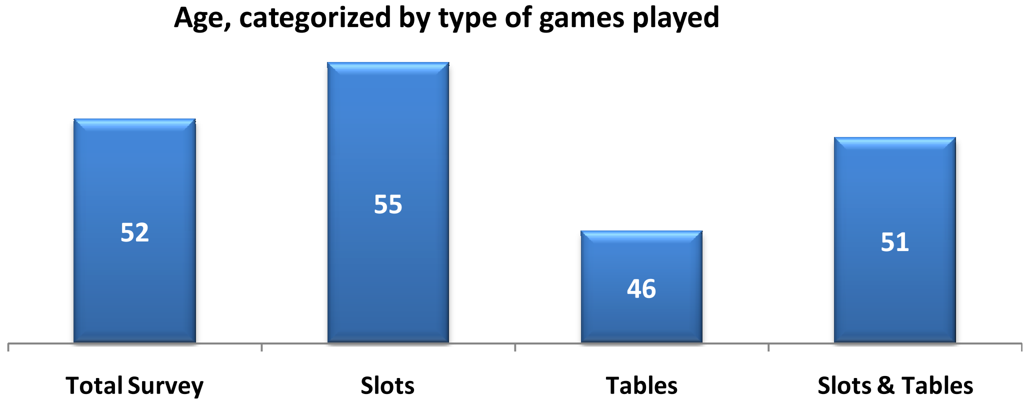


Future visitation expectations, categorized by type of games played



Travel mode, categorized by type of games played

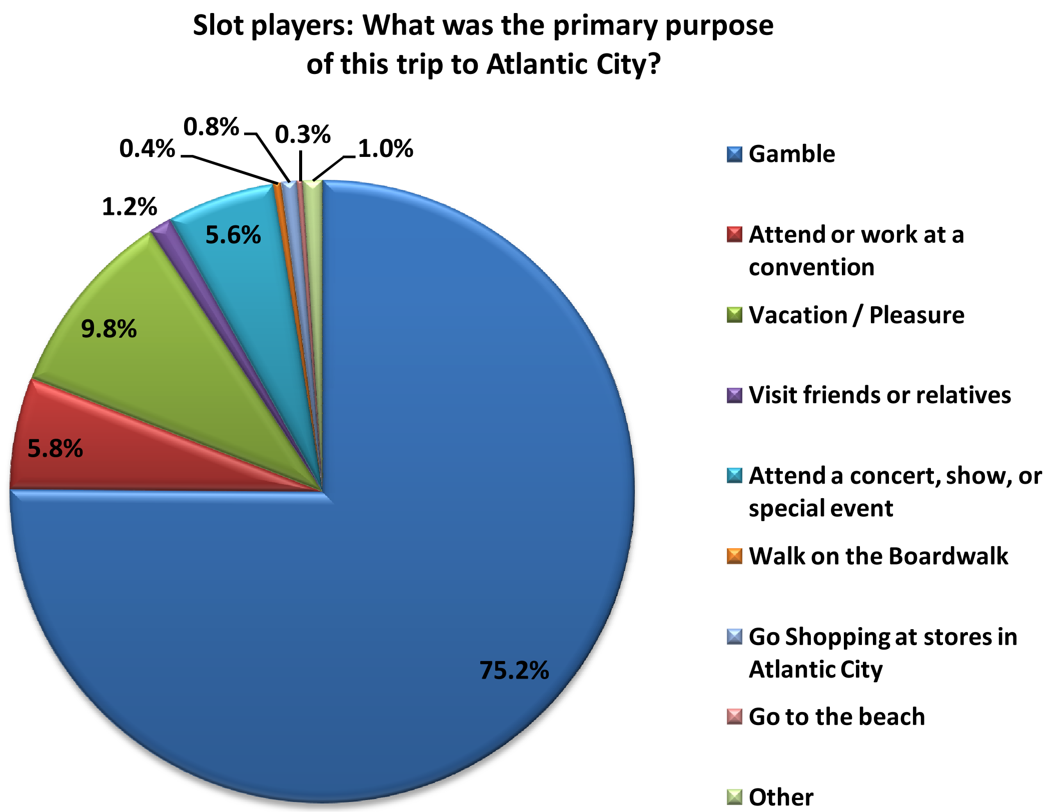




Slot Players

Slot players make up the largest gaming segment in the sample, with 49.3% of all responses, or a total of 1,527 individuals. Of all gaming segments profiled in the following pages, slot players are the most strongly motivated to come to Atlantic City primarily to gamble (75.2%).

Figure 78 – Slot Player Segment Primary Trip Purpose



Slot players visit Atlantic City more frequently than table slot players but they do not stay as long, gamble for fewer hours, and spend significantly less than table players. They are also older than table players, less well educated, and much more strongly female than table players. The median age for table players is 55 vs. 46 for slot players, only 35.6% are college graduates of higher compared to a total of 51.7% for table players, and the proportion of males among slot players is significantly lower at 29.0% vs. 70.3% for table players.

Slot players have a relatively low economic value, with a median spending figure of $430 per trip compared to $787 for table players. Slot players also have lower income levels than table players, with only 13.6% making more than $100,000 annually vs. 27.1% earning at this level among table players. Slot players are significantly less likely to stay overnight than table players (52.1% vs. 62.0%) and they are less likely to gamble in other destinations than table players (37.4% vs. 53.6%). Both segments are identically satisfied with Atlantic City, with a rating of 94.3% positive for both slots and table players. Importantly, slot players, perhaps because they are older and more strongly female, are significantly less likely to perceive Atlantic City as a safe destination than table players are (83.5% vs. 90.1%).

Figure 79 – Slot Player Segment Profile

Key numeric measures: Slot players (1,527 responses)			
	Mean	**Median**	**Mode**
Age	55	55	52
No. of annual visits	19.4	12	12
Meals eaten	3.7	2	1
Casinos Gambled During Visit	2.1	2	2
Loyalty Cards Carried	3.0	2	2
Hours Gambling	11.2	6	5
Nights Stayed	2.3	2	2
Total Hours in Atlantic City	33.3	24	8
Adults in Party	2.5	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	2.4	1	0
Planning Days	18.8	7	7

Slot players: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$483	$493	$300	$300	$200	$200
F&B	$67	$101	$25	$50	$0	$100
Shopping	$75	$190	$0	$100	$0	$100
Entertainment	$17	$142	$0	$100	$0	$100
Lodging	$24	$304	$0	$240	$0	$400
Travel	$39	$43	$15	$20	$5	$5
Total Spending	$703	$704	$430	$431	$505	$505

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Slot players: key trip characteristics	Category	Percentage
Travel Mode	Car	71.6%
	Bus	23.7%
	Other	4.6%
Stay Overnight	Overnight Guest	52.1%
	Day Tripper	47.4%
Those Who are Traveling as Part of Package	% Yes	22.7%

Slot players: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	22.8%
Marital Status	Married	54.2%
	Single	32.6%
Education	High school graduate or less	36.4%
	College graduate or more	35.6%
Empty Nester	Children <18	19.7%
Employment	Full-Time	53.6%
	Retired	30.6%
Occupation	Professional/Tech	44.7%
Household Income	% Under $100K	80.7%
	% Over $100K	13.6%
Ethnicity	White/Caucasian	69.5%
	African American	22.4%
	Asian	3.9%
	Hispanic	3.8%
Gender	Male	29.0%
	Female	71.0%

Slot players: Gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	100.0%
	Tables	0.0%
	Both	0.0%
	Poker	0.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	83.1%
% Who Gamble Elsewhere	% Yes	37.4%

Slot players: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.3%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	95.5%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	83.5%
% Likely to Revisit	Within Next 2 Yrs	92.8%
Those Who Would Recommend Atlantic City to others	% Yes	98.7%
Those who are currently visiting Atlantic City:	More Often	19.0%
	Less Often	3.1%

*Multiple modes exist. The smallest value is shown.

Table Players

Table players comprise a relatively small segment, making up 7.6% of the total survey or a total of 234 responses. Table players generally conform to the larger survey in the reasons why they visit Atlantic City, although they do display a somewhat higher motivation to gamble, are less likely to be general tourists visiting for the purpose of vacation/pleasure, and are significantly more likely to be coming to Atlantic City to attend a convention or trade show (18.4%).

Figure 80 – Table Player Segment Primary Trip Purpose

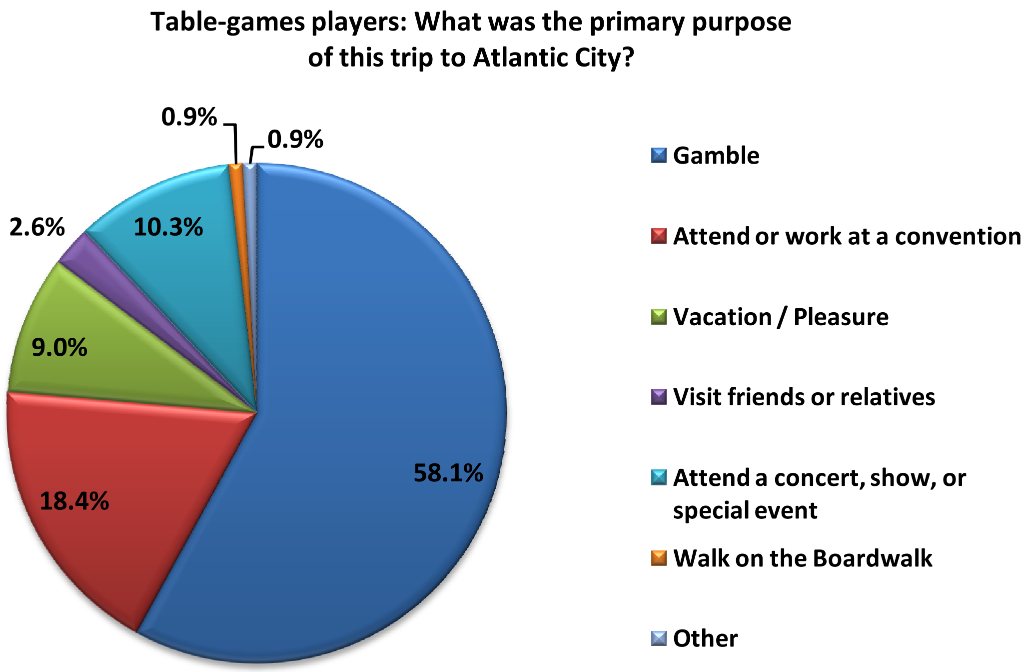


Table players visit less frequently than slot players but they stay longer, gamble for more hours, and spend significantly more than slot players. They are also younger, better educated, and much more strongly male than slot players. The median age for table players is 46 vs. 55 for slot players, a total of 51.7% are college graduates of higher compared to only 35.6% for slot players, and the proportion of males among table players is 70.3% vs. 29.0% for slot players.

Table players have a high economic value, with a median spending figure of $787, compared to $430 for slot players. Table players also display a higher income level than slot players, with 27.1% making more than $100,000 annually vs. only 13.6% earning at this level among slot players. They are significantly more likely to stay overnight than slot players (62.0% vs. 52.1%), however they also are much more likely to gamble in other destinations than slot players are (53.6% vs. 37.4%).

Both segments are identically satisfied with Atlantic City, with a rating of 94.3% positive for both table and slot players. Table players, perhaps because they are younger and more strongly male, are significantly more likely to perceive Atlantic City as a safe destination than slot players are (90.1% vs. 83.5%).

Figure 81 – Table Player Segment Profile

Key numeric measures: Table players (234 responses)	Mean	Median	Mode
Age	48	46	51
No. of annual visits	20.7	10	12
Meals eaten	4.1	2	1
Casinos Gambled During Visit	2.0	2	2
Loyalty Cards Carried	2.8	2	2
Hours Gambling	13.6	6	5
Nights Stayed	2.5	2	2
Total Hours in Atlantic City	40.5	28	72
Adults in Party	2.5	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	3.6	1	0
Planning Days	26.0	7	7

Table players: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$1,179	$1,215	$500	$500	$500	$500
F&B	$135	$209	$50	$100	$0	$100
Shopping	$98	$222	$0	$200	$0	$200
Entertainment	$112	$435	$0	$168	$0	$50*
Lodging	$90	$585	$0	$300	$0	$300
Travel	$46	$49	$18.50	$20	$10*	$10*
Total Spending	$1,658	$1,672	$787	$803	$500*	$500*

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Table players: key trip characteristics	Category	Percentage
Travel Mode	Car	80.3%
	Bus	14.5%
	Other	5.1%
Stay Overnight	Overnight Guest	62.0%
	Day Tripper	37.6%
Those Who are Traveling as Part of Package	% Yes	27.2%

Table players: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	29.6%
Marital Status	Married	56.0%
	Single	39.2%
Education	High school graduate or less	23.7%
	College graduate or more	51.7%
Empty Nester	Children <18	22.8%
Employment	Full-Time	63.5%
	Retired	18.7%
Occupation	Professional/Tech	51.2%
Household Income	% Under $100K	68.1%
	% Over $100K	27.1%
Ethnicity	White/Caucasian	71.0%
	African American	14.3%
	Asian	9.5%
	Hispanic	3.9%
Gender	Male	70.3%
	Female	29.7%

Table players: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	0.0%
	Tables	100.0%
	Both	0.0%
	Poker	0.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	79.4%
% Who Gamble Elsewhere	% Yes	53.6%

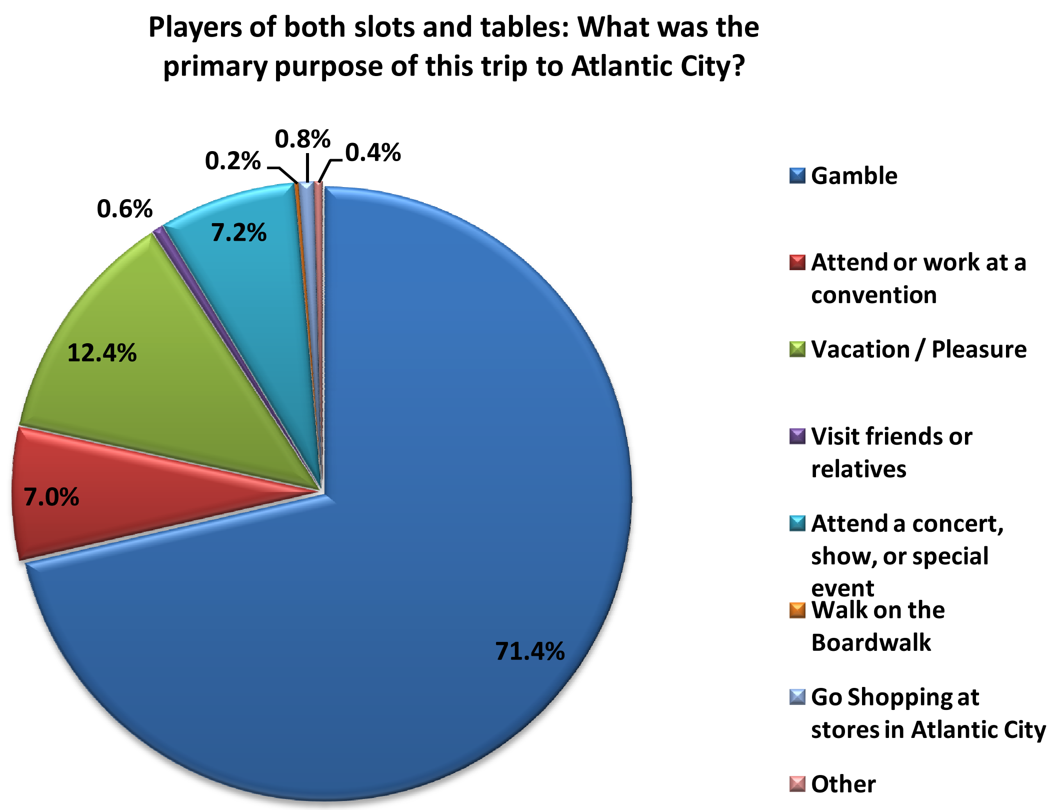
Table players: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.3%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	93.9%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	90.1%
% Likely to Revisit	Within Next 2 Yrs	91.4%
Those Who Would Recommend Atlantic City to others	% Yes	99.1%
Those who are currently visiting Atlantic City:	More Often	21.1%
	Less Often	3.5%

*Multiple modes exist. The smallest value is shown.

Both Slot and Table Games Players

Survey respondents who play both slots and tables make up 17% of the survey base, or a total of 526 responses. This segment is strongly motivated to visit Atlantic City for the purpose of gambling (71.4%).

Figure 82 – Both Slot and Table Player Segment Primary Trip Purpose



Gamblers who play both slots and tables spend more and stay longer than either exclusive slot or table players. Median total spending for this segment totals $831 vs. $787 for exclusively table players and vs. $430 for exclusively slot players. This segment also is more likely to stay overnight (68.1%) and as a result spends a median of 48 hours in Atlantic City during a typical trip, vs. 24 hours for exclusively slot players and 28 hours for exclusively table players. However, this valuable segment is also highly mobile and very likely to gamble in other destinations (48.8%).

Figure 83 – Both Slot and Table Player Segment Profile

Key numeric measures: Table/slot players (526 responses)	Mean	Median	Mode
Age	50	51	54
No. of annual visits	19.2	12	12
Meals eaten	4.3	3	1
Casinos Gambled During Visit	2.4	2	2
Loyalty Cards Carried	3.3	3	2
Hours Gambling	15.4	9	5
Nights Stayed	2.6	2	2
Total Hours in Atlantic City	44.1	48	48
Adults in Party	2.5	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips to Other Destinations	2.9	2	0
Planning Days	21.2	7	7

Table/slot players: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$934	$949	$500	$500	$500	$500
F&B	$107	$172	$38	$110	$0	$200
Shopping	$119	$253	$0	$200	$0	$200
Entertainment	$44	$211	$0	$105	$0	$200
Lodging	$35	$309	$0	$300	$0	$400
Travel	$62	$67	$16	$20	$5	$5
Total Spending	$1,301	$1,301	$831	$831	$1,050	$1,050

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Table/slot players: key trip characteristics	Category	Percentage
Travel Mode	Car	81.4%
	Bus	14.6%
	Other	4.0%
Stay Overnight	Overnight Guest	68.1%
	Day Tripper	31.4%
Those Who are Traveling as Part of Package	% Yes	27.4%

Table/slot players: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	27.0%
Marital Status	Married	58.8%
	Single	36.2%
Education	High school graduate or less	28.4%
	College graduate or more	50.4%
Empty Nester	Children <18	24.1%
Employment	Full-Time	63.0%
	Retired	18.0%
Occupation	Professional/Tech	55.6%
Household Income	% Under $100K	74.3%
	% Over $100K	20.9%
Ethnicity	White/Caucasian	75.1%
	African American	14.6%
	Asian	6.3%
	Hispanic	3.4%
Gender	Male	51.3%
	Female	48.7%

Table/slot players: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	0.0%
	Tables	0.0%
	Both	100.0%
	Poker	0.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	86.6%
% Who Gamble Elsewhere	% Yes	48.8%

Table/slot players: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	95.6%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	97.1%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	89.6%
% Likely to Revisit	Within Next 2 Yrs	92.7%
Those Who Would Recommend Atlantic City to others	% Yes	97.9%
Those who are currently visiting Atlantic City:	More Often	18.0%
	Less Often	3.3%

*Multiple modes exist. The smallest value is shown.

Smokers

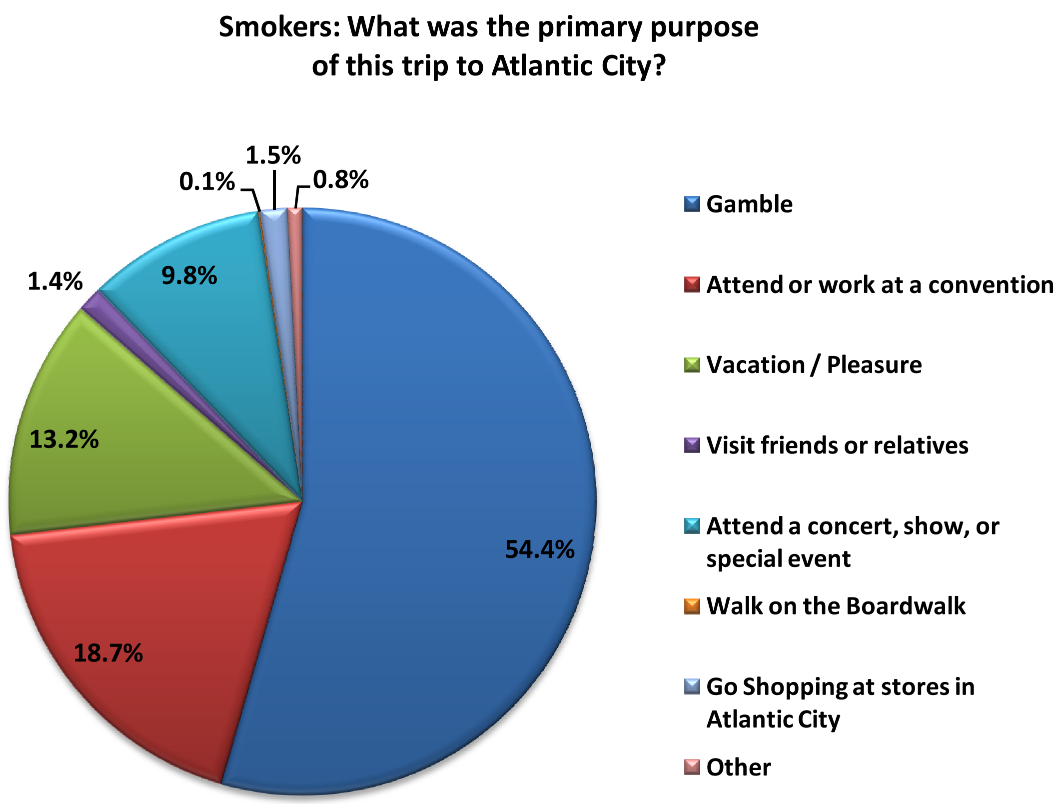
Atlantic City visitors who smoke make up 23.5% of the survey, or a total of 725 responses. This proportion of smokers in the survey is somewhat higher than the national average, which has steadily declined over the past 15 years, according to US Census Bureau statistics. However, the incidence of smokers in the survey closely matches the average national smoking incidence over the past 15 years.

Figure 84 – Smoking Incidence Nationwide (US Census Data)[17]

	1990	1995	2000	2005	15-Year Average
Total Smokers	25.5	24.7	23.2	20.9	23.6

Smokers generally conform to the overall sample regarding reasons for visiting Atlantic City, with the notable exception that visitors who are coming to attend a convention or trade show demonstrate a significantly higher proportion of smokers than found in the total survey (18.7% vs. 13.7%).

Figure 85 – Smoker Segment Primary Trip Purpose



[17] United States Census Bureau

Smokers visit Atlantic City frequently, with a median annual visitation rate of eight trips annually. In a finding that contravenes conventional wisdom, smokers as a group display a lower median spending figure than non-smokers ($468 vs. $500). However, the median gambling budgets are higher for smokers ($250 vs. $200) and average spending figures for both gambling ($655 vs. $497) and total spending ($981 vs. $796) are higher among smokers than non-smokers, indicating that smokers of higher worth spend at a higher magnitude than non-smokers. Smokers gamble longer than non-smokers (mean 14.6 hours vs. 11.5 hours), and, while income levels for smokers are lower than non-smokers, they spend more in proportion to their income.

Smokers are less well educated than non-smokers, more spontaneous in their trip planning, even though they are more likely to have children under age 18 living at home. They are younger, with a median age of 47 years old vs. age 53 for non-smokers, more strongly male (46.2% vs. 37.8%), and they are more likely to be single than non-smokers (40.7% vs. 32.9%). Both smokers and non-smokers appear to be equally well satisfied with Atlantic City.

Figure 86 – Smoker Segment Profile

Key numeric measures: Smokers (725 responses)	Mean	Median	Mode
Age	46	47	51
No. of annual visits	16.7	8	12
Meals eaten	4.0	2	1
Casinos Gambled During Visit	2.3	2	2
Loyalty Cards Carried	3.0	2	2
Hours Gambling	14.6	7	5
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	36.2	24	48
Adults in Party	2.8	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	2.8	1	0
Planning Days	24.4	7	7

Smokers: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$655	$740	$250	$300	$500	$500
F&B	$93	$133	$40	$60	$0	$100
Shopping	$85	$203	$0	$100	$0	$100
Entertainment	$55	$267	$0	$100	$0	$100
Lodging	$48	$394	$0	$279	$0	$300
Travel	$43	$48	$11	$15	$5	$5
Total Spending	$981	$982	$468	$469	$505	$505

The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

Smokers: Key Trip Characteristics	Category	Percentage
Travel Mode	Car	77.5%
	Bus	17.1%
	Other	5.4%
Stay Overnight	Overnight Guest	54.9%
	Day Tripper	44.4%
Those Who are Traveling as Part of Package	% Yes	23.1%

Smokers: Demographic Characteristics	Category	Percentage
Do You Smoke?	% Yes	100.0%
Marital Status	Married	48.8%
	Single	40.7%
Education	High school graduate or less	35.4%
	College graduate or more	35.9%
Empty Nester	Children <18	28.6%
Employment	Full-Time	69.1%
	Retired	13.4%
Occupation	Professional/Tech	40.1%
Household Income	% Under $100K	82.4%
	% Over $100K	13.9%
Ethnicity	White/Caucasian	72.0%
	African American	23.4%
	Asian	1.5%
	Hispanic	2.9%
Gender	Male	46.2%
	Female	53.8%

Smokers: Gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	60.6%
	Tables	12.0%
	Both	24.6%
	Poker	2.1%
	Other	0.0%
Member of Player Loyalty Club	% Yes	75.4%
% Who Gamble Elsewhere	% Yes	37.7%

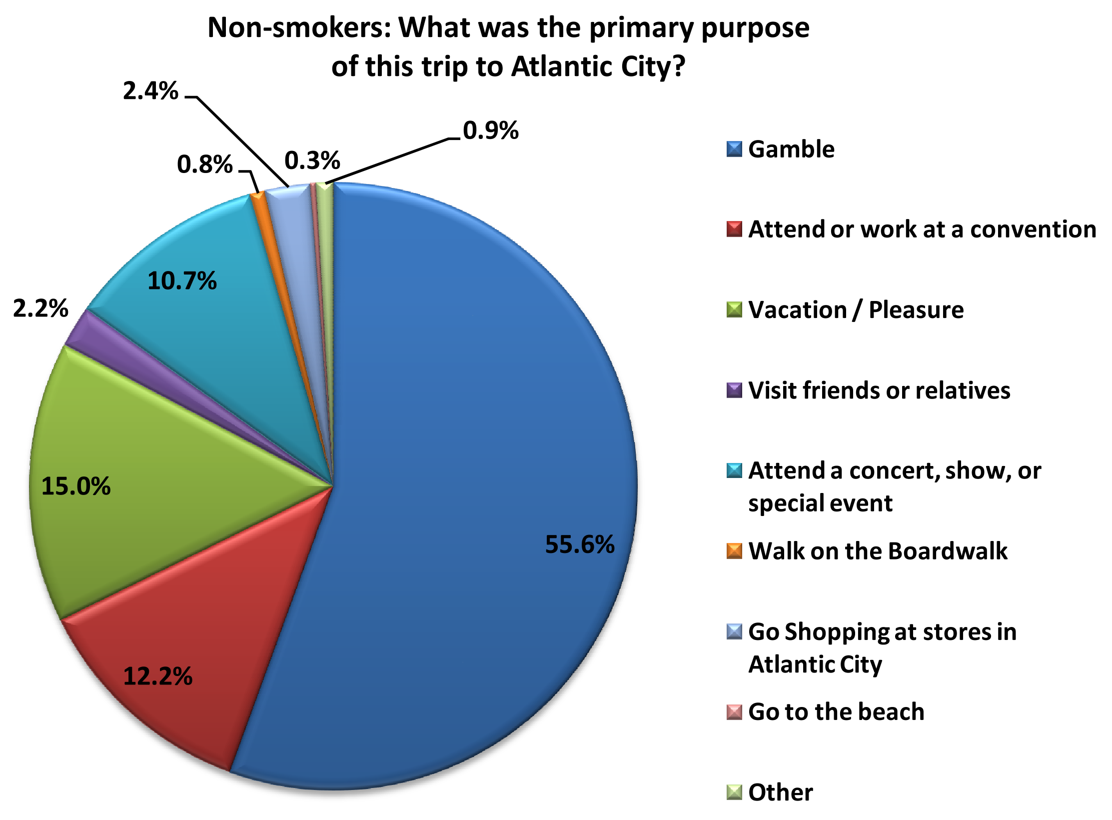
Smokers: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.3%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	94.4%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	85.7%
% Likely to Revisit	Within Next 2 Yrs	86.0%
Those Who Would Recommend Atlantic City to others	% Yes	98.6%
Those who are currently visiting Atlantic City:	More Often	19.7%
	Less Often	3.3%

*Multiple modes exist. The smallest value is shown.

Non-Smokers

Non-smokers make up 76.5% of the survey, or a total of 2,357 responses. Non-smokers closely conform to the overall survey in regard to reasons for visiting Atlantic City, as would be expected given the large base size of this segment.

Figure 87 – Non-Smoker Segment Primary Trip Purpose



Non-smokers also come to Atlantic City frequently, with a median annual visitation rate of eight trips annually. They display a slightly higher median spending figure than smokers

($500 vs. $468), although mean spending budgets are lower ($796 vs. $981). Non-smokers are older on average than smoking visitors (median 53 years old vs. 47 years old), do not gamble as long (11.5 hours vs. 14.6 hours), and display longer planning timeframes than smokers do. Both segments appear to be equally well satisfied with Atlantic City.

Figure 88 – Non-Smoker Segment Profile

Key numeric measures: Non-smokers (2,357 responses)	Mean	Median	Mode
Age	52	53	52
No. of annual visits	16.6	8	12
Meals eaten	3.8	2	1
Casinos Gambled During Visit	2.1	2	2
Loyalty Cards Carried	2.8	2	2
Hours Gambling	11.5	6	5
Nights Stayed	2.4	2	2
Total Hours in Atlantic City	35.3	24	8
Adults in Party	2.6	2	2
No. of Those Under 21 in Party	0.2	0	0
Overnight Trips: Other Destinations	2.7	1	0
Planning Days	23.3	14	7

Non-smokers: spend per visit*	Mean, counting 0	Mean, not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$497	$580	$200	$300	$0	$200
F&B	$91	$125	$40	$80	$0	$200
Shopping	$94	$207	$0	$150	$0	$100
Entertainment	$33	$173	$0	$100	$0	$100
Lodging	$32	$321	$0	$269	$0	$300
Travel	$48	$53	$15	$20	$5	$5
Total Spending	$796	$797	$500	$500	$500	$500

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Non-smokers: Key Trip Characteristics	Category	Percentage
Travel Mode	Car	75.9%
	Bus	19.0%
	Other	5.0%
Stay Overnight	Overnight Guest	53.0%
	Day Tripper	46.3%
Those Who are Traveling as Part of Package	% Yes	23.6%

Non-smokers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	0.0%
Marital Status	Married	57.8%
	Single	32.9%
Education	High school graduate or less	29.3%
	College graduate or more	44.8%
Empty Nester	Children <18	23.7%
Employment	Full-Time	57.6%
	Retired	24.9%
Occupation	Professional/Tech	51.4%
Household Income	% Under $100K	74.2%
	% Over $100K	18.9%
Ethnicity	White/Caucasian	71.4%
	African American	18.7%
	Asian	5.7%
	Hispanic	3.5%
Gender	Male	37.8%
	Female	62.2%

Non-smokers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	67.4%
	Tables	9.4%
	Both	21.9%
	Poker	0.7%
	Other	0.2%
Member of Player Loyalty Club	% Yes	71.5%
% Who Gamble Elsewhere	% Yes	35.0%

Non-smokers: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	93.7%
Those Who View Atlantic City as ‘More Attractive’	Agree/Strongly Agree	95.6%
Those Who View Atlantic City as ‘Safe’	Agree/Strongly Agree	81.8%
% Likely to Revisit	Within Next 2 Yrs	87.6%
Those Who Would Recommend Atlantic City to others	% Yes	98.1%
Those who are currently visiting Atlantic City:	More Often	19.6%
	Less Often	3.3%

One of the satisfaction attributes addressed in the survey concerns the importance of a non-smoking environment. Non-smokers accord this attribute much greater importance than do smokers with non-smokers registering 87.4% important on the five-point scale while smokers post only 36.5% important vs. 40.5% unimportant.. What is surprising, however, is that more than one-third of smokers rate a smoke-free environment as a factor important to overall satisfaction with their visit. This finding demonstrates that a substantial minority of smokers positively value a smoke-free environment even if it may be inconvenient to their smoking behavior.

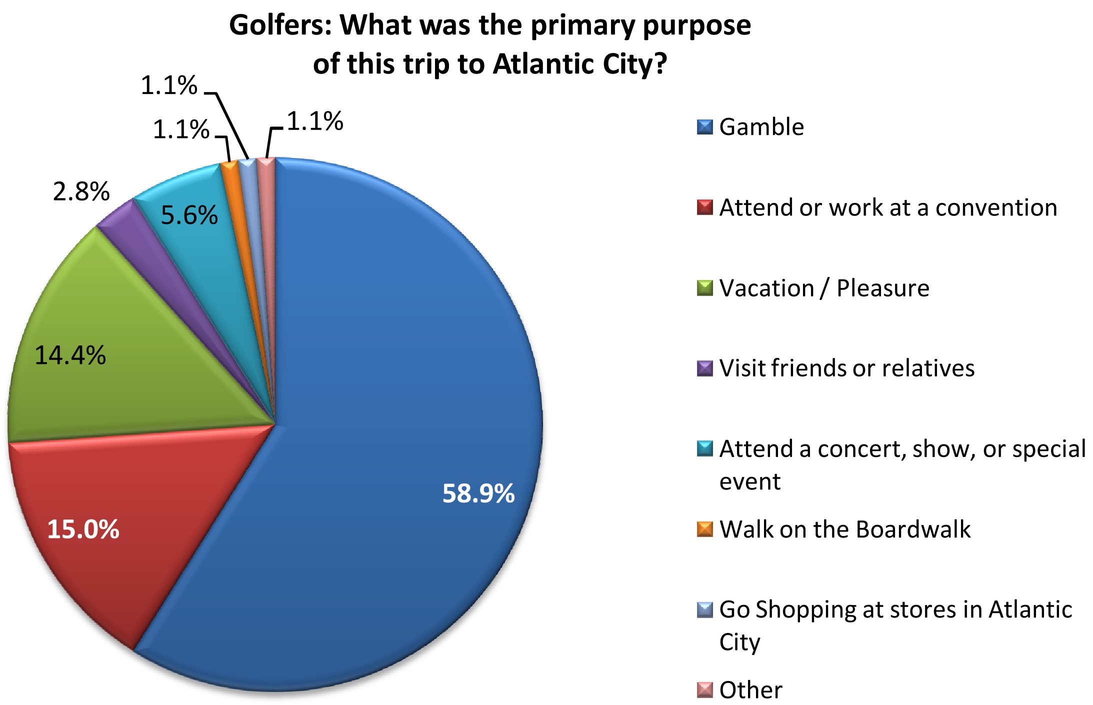
Figure 89 – Cross tabulation – Importance of Non-Smoking Environment by Smoking Behavior

Importance of a non-smoking environment	Do you smoke?		
	Yes	No	Total
Extremely Important	24.0%	66.5%	56.9%
Very Important	12.5%	20.9%	19.0%
Important	23.1%	9.6%	12.6%
Not Very Important	25.9%	1.5%	7.0%
Not At All Important	14.6%	1.5%	4.5%

Golfers

Visitors who come to Atlantic City primarily for the purpose of playing golf made up only a tiny proportion of the survey. However, a total of 181 persons taking the survey rated golf as an important factor in their decision to visit Atlantic City. These golfers are coming to Atlantic City primarily to gamble (58.9%) but also as general tourists (vacation / pleasure 14.4%).

Figure 90 – Golfer Segment Primary Trip Purpose



Golfers are highly likely to stay overnight (60.2%) and they usually spend the night in an Atlantic City casino hotel (82.4%). Golfers are more male (50.8%), highly educated, (52.8% college graduate or greater), and reflect higher income levels (24% earning over $100,000) than most Atlantic City visitors. They are also somewhat younger, more likely to smoke (28.2%), to play table games (17.4%), and to gamble elsewhere (50.9%) than the general visitor. Golfers appear just as highly satisfied with Atlantic City as general visitors (94.4% positive), although not as highly satisfied as some other segments in the survey.

Figure 91 – Golfer Segment Profile

Key numeric measures: Golfers (181 responses)	Mean	Median	Mode
Age	51	52	51
No. of annual visits	11.5	5.5	2
Meals eaten	4.5	2	2
Casinos Gambled During Visit	2.4	2	3
Loyalty Cards Carried	3.3	2	2
Hours Gambling	20.1	8	8
Nights Stayed	2.6	2	2
Total Hours in Atlantic City	35.2	24	48
Adults in Party	2.7	2	2
No. of Those Under 21 in Party	0.1	0	0
Overnight Trips to Other Destinations	6.6	2	0
Planning Days	19.6	7	7

Golfers: spend per visit*	Mean, counting 0	Mean,not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Mode, not counting 0
Gambling	$720	$785	$300	$450	$500	$500
F&B	$128	$195	$40	$100	$0	$100
Shopping	$115	$260	$0	$100	$0	$100
Entertainment	$99	$321	$0	$100	$0	$100
Lodging	$77	$632	$0	$300	$0	$300
Travel	$58	$67	$20	$20	$0	$5
Total Spending	$1,197	$1,204	$700	$703	$800	$800

**The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses*

Golfers: key trip characteristics	Category	Percentage
Travel Mode	Car	83.4%
	Bus	11.6%
	Other	5.0%
Stay Overnight	Overnight Guest	60.2%
	Day Tripper	38.7%
Those Who are Traveling as Part of Package	% Yes	21.7%

Golfers: Demographic Characteristics	Category	Percentage
Do You Smoke?	% Yes	28.2%
Marital Status	Married	58.3%
	Single	32.2%
Education	High school graduate or less	26.1%
	College graduate or more	52.8%
Empty Nester	Children <18	23.8%
Employment	Full-Time	63.5%
	Retired	24.3%
Occupation	Professional/Tech	72.7%
Household Income	% Under $100K	68.7%
	% Over $100K	24.0%
Ethnicity	White/Caucasian	71.3%
	African American	21.0%
	Asian	2.2%
	Hispanic	5.0%
Gender	Male	50.8%
	Female	49.2%

Golfers: Gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	49.7%
	Tables	17.4%
	Both	28.2%
	Poker	4.0%
	Other	0.0%
Member of Player Loyalty Club	% Yes	77.7%
% Who Gamble Elsewhere	% Yes	50.9%

Golfers: Attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.4%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	98.3%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	90.6%
% Likely to Revisit	Within Next 2 Yrs	89.0%
Those Who Would Recommend Atlantic City to others	% Yes	96.7%
Those who are currently visiting Atlantic City:	More Often	21.7%
	Less Often	8.3%

*Multiple modes exist. The smallest value is shown.

COMPARISONS TO PRIOR SURVEY FINDINGS

Comparisons between the 2004 Atlantic City Visitor Profile and similar tour and travel studies conducted here and around the country can provide direction as to how Atlantic City is changing and insights into how to advantageously address these changes from a marketing perspective.

1998 and 2004 Atlantic City Visitor Profiles

More than one-third of those interviewed in 2008 are college graduates, up significantly from previous surveys, and while the median age remains unchanged, the proportion of retirees has declined since 1998. The proportion of visitors with children living in the household has steadily increased over the past three survey waves. Most importantly, positive satisfaction levels (extremely or very well satisfied with Atlantic City) have risen from the already high levels observed in the 1998 study.

Figure 92 – Demographic Comparison Atlantic City VPS 2008 vs. 2004 vs1998

Demographic Comparisons	Atlantic City Visitor Profile 1998	Atlantic City Visitor Profile 2004	Atlantic City Visitor Profile 2008
Median Age	55	52	52
Percent Male	44%	34%	36%
Percent Female	56%	66%	64%
Percent White	87%	63%	67%
Percent African American	10%	26%	23%
Percent Hispanic	N/A	7%	4%
Percent Asian	N/A	3%	6%
Percent Married	64%	48%	51%
Percent College Grad or >	32%	28%	36%
Median Household Income	$51K	$55K	$58K
Percent w/ Children Under 18	7%	15%	22%
Percent Retired	35%	N/A	29%
Percent First-Time Visitors	8%	4%	4%
Percent Highly Satisfied	91%	90%*	94%
Average Planning Days	27	N/A	14
Median Annual Trips	13	6	12
Median Hours spend in Atlantic City	N/A	7	8
Median Annual Trips	13	6	12

*Gamblers only

Comparing previous Atlantic City Visitor Profiles to the 2008 study, we find that trip frequency rose from a median six visits annually to a median of eight per year, while still below the median 13 annual visits measured in the 1998 VPS. The proportion of first-time visitors has also remained constant at 4% in both 2004 and 2008, down from the 8% measured in the 1998 VPS.

Spending on gambling has remained constant across the two surveys at a median $200, while total spending has increased from a median amount of $184 in 2004 to a median of $331 in 2008. This is clear evidence that Atlantic City visitors are now spending more on non-gaming amenities, and that the resort is evolving into a less gambling-centric and more broadly attractive tourist destination. The category where median spending has grown most is food and beverage, demonstrating that visitors in 2008 are increasingly likely to spend more on dining than they did four years ago.

This increased food-and-beverage budget is also indicative of a trend toward longer stay. The longer the stay, the more meals will be consumed.

Figure 93– Median Spending Comparison Atlantic City VPS 2008 vs. 2004

Median Spending (Including 0's)	Atlantic City Visitor Profile 2004	Atlantic City Visitor Profile 2008
Gambling	$200	$200
Food & Beverage	$20	$25
Shopping	$0	$0
Entertainment	$0	$0
Lodging	$0	$0
Travel	N/A	$10
Total Spending	$184	$331

Average gambling expenditures have increased since the first Atlantic City VPS conducted in 1998. Average gambling spend has increased from $469 in the 1998 VPS to $699 in the 2008 VPS. Average spending figures were not reported in the 2004 VPS, so mean spending comparisons cannot be made across all three studies.

The greatest increase in gambling expenditures over the 10-year period was observed for package purchasers, overnight guests, event attendees, and gamblers, while day- trip visitors have increased gambling expenditures only slightly – and convention attendees now actually spend less on average than reported in 1998. Even when considering only those conventioneers who actually made gambling expenditures (i.e., excluding surveys that reported zeroes) the mean spending figure of $284 remains $40 less than recorded in 1998. These findings indicate that package purchasers, event attendees and overnight guests are increasing their gaming budgets at a faster rate than those whose primary motivation is gambling.

Long-term, this could indicated may constitute higher growth segments for gambling expenditures than existing gamblers. This would indicate a potentially promising trend for casino operators and others seeking to expand their demographic and geographic reach: by attracting more adults motivated by attractions other than gambling, casino revenues can be expected to increase.

Figure 94 – Average Gambling Expenditures Comparison by Segment 1998, 2004 and 2008

Mean Gambling Spending by Segment (Including 0's)	Atlantic City visitor Profile 1998	Atlantic City visitor Profile 2004	Atlantic City Visitor Profile 2008
Gambler	$469	N/A	$699
Convention Attendee	$324	N/A	$169
Shopper	N/A	N/A	$109
Event Attendee	$259	N/A	$354
Vacationer	$331	N/A	$492
Package User	$343	N/A	$1,067
Day Trip	$241	N/A	$272
Overnight	$506	N/A	$760
Total Sample	$406	$475	$416

Travel in Atlantic City after arrival has changed since the 1998 VPS, with fewer visitors walking and more driving or taking the casino shuttle and less traveling around town by taxi.

Figure 95 – Modes of Travel within Atlantic City 1998, 2004 and 2008

In-City Transportation Comparisons	Atlantic City Visitor Profile 1998	Atlantic City Visitor Profile 2004	Atlantic City Visitor Profile 2008
Walk	62%	N/A	46%
Drive	31%	N/A	40%
Jitney	7%	N/A	7%
Casino Shuttle	N/A	N/A	5%
Taxi	5%	N/A	3%

Feeder markets were profiled in both the 1998 and 2004 studies. Updating these visitor home locations by area shows that Atlantic City remains dependent upon the drive in and bus travel segments for the majority of its visitors.

Figure 96 – Feeder Market Estimates 1998, 2004, and 2008

	Atlantic City Visitor Profile 1998	Atlantic City Visitor Profile 2004	Atlantic City Visitor Profile 2008
Mid-Atlantic	79%	75%	86%
New Jersey	31%	35%	41%
New York	23%	24%	23%
Pennsylvania	25%	22%	21%
Delaware		1%	2%
South Atlantic (MD/VA/DC)	13%		11%
Midwest and South	N/A	13%	N/A
New England	N/A	3%	3%
Great Plains and West	N/A	2%	N/A

Atlantic City faces a growing number of competitive challenges from emerging gaming and tourism markets, requiring greater efforts to retain visitors who are interested in gambling, particularly at a time of high gasoline prices. The percentage of visitors who now gamble elsewhere has increased by 10 percentage points over what was reported in the 2004 VPS (34% in 2008 vs. 24% in 2004). This erosion has been particularly acute among visitors who are primarily motivated by gambling, with 42.5% reporting that they have gambled elsewhere during the past 12 months. During these intervening years, tourism industry marketing has become increasingly competitive.

At the time that the 2004 VPS was conducted, slots-only facilities were being planned in Pennsylvania and New York, which are in Atlantic City's core market. The 2004 VPS attempted to gauge future behavior by asking respondents whether they would still come to Atlantic City more often, less often, or just as often as in the past if a gaming facility opened nearer to their home. The 2004 study found that 9% of visitors would come less frequently and 2% would stop coming, while 89% would come to Atlantic City the same number of times if a gaming facility opened nearer to their homes.

The 2004 study also found that the most loyal visitors included Delaware and New York gamblers and that those who carry bankrolls between $100 – $499 would be more loyal than visitors spending lower (under $100) and higher (over $500) amounts per trip.

As expected, the projected behavior differs perceptibly from the actual behavior, once the choices were no longer hypothetical. In the 2008 study, fully one-third of all visitors (34.2%) say that they have gambled elsewhere over the past 12 months. Most of those trips were made to Las Vegas (30.5%), followed by Pennsylvania (19.7%), Connecticut (15.4%), New York (8.2%), and Delaware (7.8%).

2007 Las Vegas Visitor Profile

Las Vegas and Connecticut rank relatively high among gaming destinations, in part because they are the options that offer full-service destinations, including hotels and table games. As noted, when Atlantic City table players visit other destinations, Las Vegas gets 40.9 percent of their business.

Among convention visitors, Atlantic City is a strongly attractive destination. Asked whether they would be more or less interested in attending a convention, trade show or business meeting because it was held in Atlantic City, a strong majority (59.5%) reply in the affirmative, while only one-twentieth (5.1%) of these respondents say that they are less interested in attending because the event is held in Atlantic City.

This result compares favorably with an identical question asked in the Las Vegas Visitor Profile beginning in 2006, when 48% replied in the affirmative, as well as in 2008, when 63% of respondents said that they were more interested in attending a convention, trade show, or business meeting because it was held in Las Vegas.[18]

Other comparisons with the Las Vegas VPS include the following:

[18] Las Vegas Visitor Profile, Calendar Year 2008, prepared for LVCCVA by GLS Research

Figure 97 – Multi-year comparison of Las Vegas, Atlantic City

		Proportion of visitors who were first-time visitors	Proportion of visitors whose primary purpose for current trip was vacation or pleasure	Proportion of visitors whose primary purpose for current trip was to gamble	Proportion of visitors whose primary purpose for current trip was to visit friends and relatives	Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	Proportion of repeat visitors whose primary purpose for current trip was to gamble
L.V. Visitor Profile	2003	17%	63%	4%	6%	62%	4%
	2004	19%	63%	4%	7%	62%	5%
	2005	18%	61%	5%	7%	59%	6%
	2006	19%	49%	11%	11%	46%	13%
	2007	19%	42%	11%	13%	38%	14%
A.C. Visitor Profile	2004	4%	N/A	85%	2%	N/A	N/A
	2008	4%	6%	81%	1%	6%	81%

		Proportion of repeat visitors whose primary purpose for current trip was to visit friends and relatives	Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	Proportion of first-time visitors whose primary purpose for current trip was to gamble	Proportion of first-time visitors whose primary purpose for current trip was to visit friends and relatives	Average number of visits in past five years	Average number of visits in past year
L.V. Visitor Profile	2003	6%	68%	1%	2%	6.5	1.7
	2004	7%	68%	1%	5%	6.5	1.8
	2005	8%	69%	1%	5%	6.3	1.7
	2006	12%	67%	1%	5%	6.2	1.7
	2007	14%	60%	1%	8%	6.3	1.8
A.C. Visitor Profile	2004	N/A	N/A	N/A	N/A	N/A	N/A
	2008	1%	16%	46%	5%	N/A	23

		Average number of adults in immediate party	Proportion of visitors with persons under 21 in their immediate party	Proportion of visitors who stayed overnight	Days stayed (average)	Nights stayed (average)	Proportion of visitors who stayed in a hotel or motel room
L.V. Visitor Profile	2003	2.4	10%	99%	4.6	3.6	95%
	2004	2.6	10%	99%	4.6	3.6	95%
	2005	2.5	9%	99%	4.5	3.5	94%
	2006	2.6	10%	99%	4.6	3.6	94%
	2007	2.5	8%	99%	4.5	3.5	95%
A.C. Visitor Profile	2004	2	6%	33%	N/A	N/A	N/A
	2008	2.5	6%	16%	N/A	2.4	N/A

		Number of room occupants (average — hotel/motel only)	Lodging expenditures (average per night — non-package)	Proportion of visitors who paid a regular room rate	Proportion of visitors who bought a package or travel group trip	Average cost of package per person (among package/tour group visitors)	Average trip expenditures for food and drink
Las Vegas Visitor Profile	2003	2.1	$81.43	24%	19%	$484.13	$208.81
	2004	2.1	$86.22	41%	19%	$561.49	$238.32
	2005	2.1	$99.51	43%	17%	$571.43	$248.40
	2006	2.2	$107.12	38%	15%	$662.78	$260.68
	2007	2.2	$108.87	33%	14%	$709.90	$254.49
A.C. Visitor Profile	2004	N/A	N/A	N/A	N/A	N/A	N/A
	2008	2.6	$151.32	N/A	22%	$367	$79

		Average trip expenditures for local transport	Average trip expenditures for shopping	Average trip expenditures for shows	Average trip expenditures for sightseeing	Average trip gambling budget (among those who gambled)	Proportion who would be "more likely" to visit Las Vegas even with more places to gamble outside Las Vegas
L.V. Visitor Profile	2003	$48.93	$97.25	$42.26	$5.05	$490.87	32%
	2004	$64.62	$124.39	$47.21	$8.01	$544.93	29%
	2005	$60.46	$136.60	$49.43	$8.21	$626.50	39%
	2006	$68.70	$140.86	$50.81	$8.49	$651.94	36%
	2007	$62.66	$114.50	$47.87	$8.31	$555.64	48%
A.C. Visitor Profile	2004	N/A	N/A	N/A	N/A	N/A	N/A
	2008	$33	$149	$141	N/A	$452	N/A

		Proportion who attended any shows during their current stay in Las Vegas	Proportion who attended lounge acts (among those who attended shows)	Proportion who attended big-name headliner performances (among those who attended shows)	Proportion who attended comedy shows (among those who attended shows)	Proportion who went to other paid attractions in Las Vegas	Proportion who were "very satisfied" with their current trip to Las Vegas
L.V. Visitor Profile	2003	75%	86%	3%	13%	13%	95%
	2004	82%	89%	4%	14%	21%	93%
	2005	71%	85%	5%	14%	23%	94%
	2006	76%	75%	17%	14%	28%	96%
	2007	63%	64%	19%	21%	22%	89%
A.C. Visitor Profile	2004	N/A	N/A	N/A	N/A	N/A	(gamblers only) 90%
	2008	N/A	N/A	N/A	N/A	N/A	94%

		Proportion of visitors who were married	Proportion of visitors with a household income of $40,000 +	Proportion of visitors who were employed	Proportion of visitors who were retired	Proportion of visitors who were 40 years old +	Average age
L.V. Visitor Profile	2003	73%	66%	64%	30%	75%	50.2
	2004	73%	70%	67%	26%	72%	49
	2005	74%	79%	67%	24%	68%	47.7
	2006	79%	78%	70%	24%	69%	48
	2007	79%	80%	67%	26%	71%	49
A.C. Visitor Profile	2004	48%	N/A	N/A	N/A	N/A	(median) 52
	2008	51%	73%	67%	29%	80%	54

		Proportion who gambled while visiting Las Vegas	Average number of hours per day spent gambling (among those who gambled)	Proportion of visitors with a college diploma	Days stayed (average)	Nights stayed (average)	Proportion of visitors who stayed overnight
L.V. Visitor Profile	2003	88%	3.6	41%	4.6	3.6	99%
	2004	87%	3.3	42%	4.6	3.6	99%
	2005	86%	3.6	44%	4.5	3.5	99%
	2006	87%	3.3	48%	4.6	3.6	99%
	2007	84%	3.4	44%	4.5	3.5	99%
A.C. Visitor Profile	2004	93%	N/A	28%	N/A	N/A	33%
	2008	92%	5.3	36%	N/A	2.4	16%

		Lodging expenditures (average per night — non-package)	Average trip expenditures for food and drink	Average trip gambling budget (among those who gambled)	Average trip expenditures for shopping	Average trip expenditures for shows	Proportion convention attendees "more interested" because of event location
L.V. Visitor Profile	2003	$81.43	$208.81	$490.87	$97.25	$42.26	N/A
	2004	$86.22	$238.32	$544.93	$124.39	$47.21	N/A
	2005	$99.51	$248.40	$626.50	$136.60	$49.43	N/A
	2006	$107.12	$260.68	$651.94	$140.86	$50.81	48%
	2007	$108.87	$254.49	$555.64	$114.50	$47.87	63%
A.C. Visitor Profile	2004	N/A	N/A	N/A	N/A	N/A	N/A
	2008	$118.58	$78.56	$452.24	$148.80	$140.65	60%

GAMBLING IN PENNSYLVANIA

In addition to exploring the characteristics of those segments which present the greatest opportunity for increased visitation, it is also necessary to investigate those visitors who are coming less frequently or visiting alternative gambling destinations in order to better understand the competitive challenges facing Atlantic City.

Comparing alternative casino visitation across past studies, we see that Las Vegas remains the principal attraction for Atlantic City visitors, followed by Connecticut and Delaware. The major change in the 2008 VPS is the opening of slot gaming facilities in Pennsylvania, which has rocketed this destination to second place among the favored alternative gambling destinations in our survey sample.

Figure 98 – Atlantic City Visitors Alternate Destinations

Visitors gambling in alternative destinations	Atlantic City Visitor Profile 1998	Atlantic City Visitor Profile 2004	Atlantic City Visitor Profile 2008
Total % Gambling Elsewhere	38%	24%	34%
Gambling Locations			
Las Vegas	44%	54%	31%
Pennsylvania	N/A	N/A	20%
Connecticut	34%	25%	15%
Delaware	8%	21%	8%
New York	8%	N/A	8%
Caribbean	N/A	17%	4%
Riverboat or Midwestern	N/A	N/A	5%
Native American Casinos	N/A	N/A	3%
Cruise Ships	N/A	N/A	3%
All Other Gambling Locations	N/A	N/A	4%

As reported below, only a small proportion (3.7%) of overall visitors say they are currently coming to Atlantic City less often than they did previously and the primary reasons cited for less-frequent visitation are “less time,” “less money,” and “moved farther away.” Only 9% of less-frequent visitors interviewed say they are “going other places” but evidently this self description understates the true proportion gambling elsewhere.

Further examination shows that among visitors who are coming to Atlantic City less often, more than two-thirds (70%) have taken overnight trips to other resort destinations in the past 12 months, usually taking two trips, and more than half (50.6%) gambled during at least one of these trips. Where they gamble is, less frequently, Las Vegas and more frequently Pennsylvania, Connecticut, Delaware, New York, and cruise ships or the Caribbean.

Figure 99 – Visitors Coming Less Alternative Destination Rates

Alternative gambling destinations	Atlantic City Visitor Profile 2008 full sample	Visitors coming to Atlantic City less frequently
Las Vegas	30.5%	18.8%
Pennsylvania	19.7%	16.3%
Connecticut	15.4%	15.0%
Delaware	7.8%	11.3%
New York	8.2%	10.0%
Cruise Ships	2.9%	10.0%
Caribbean	3.9%	5.0%
Riverboat or Midwestern Casinos	4.8%	3.8%
Native American Casinos	3.0%	3.8%
All Other Gambling Locations	3.8%	6.3%

This picture becomes somewhat contradictory when looking in greater depth at the respondents who are visiting other destinations. This is a highly dynamic segment of the visitor base taking a high number of trips to other destinations (median two annually). Interestingly, with the exception of those also visiting Las Vegas, these respondents who gamble elsewhere are not visiting Atlantic City with the same frequency that they did over the past 12 months. Larger proportions are visiting Atlantic City both more frequently and less frequently than the typical visitor. It can be assumed that Atlantic City visitors who gamble elsewhere may be under-represented in this survey to some degree due to the intercept methodology, i.e., if they are coming less frequently, they are less likely to be intercepted and interviewed, this gravitation toward the two extremes of the scale indicates that many of these visitors can be influenced to visit Atlantic City more frequently, given the right incentives.

Figure 100 – Visitors Also Gambling Elsewhere Atlantic City Frequency Trend

Visitors gambling in alternative destinations	Coming to Atlantic City More Often	Coming to Atlantic City Less Often	Coming to Atlantic City About the Same
Total Survey	17.9%	3.7%	76.4%
Visiting Las Vegas	19.5%	3.3%	74.6%
Visiting Pennsylvania	29.0%	7.5%	60.7%
Visiting Connecticut	27.8%	7.1%	66.7%
Visiting Delaware	31.4%	8.6%	58.1%
Visiting New York	24.0%	7.5%	60.7%

Figure 101 – Visitors Also Gambling Elsewhere Atlantic City Frequency Rates

Number of annual trips to Atlantic City by those also gambling elsewhere	Mean	Median	Mode
Visiting Atlantic City (Total Survey)	16.6	8	12
Visiting Las Vegas	20.8	12	12
Visiting Pennsylvania	20.7	10	12
Visiting Connecticut	17.7	10	12
Visiting Delaware	17.8	12	12
Visiting New York	18.2	10	12

Also Gambling in Pennsylvania Visitor Profile

Pennsylvania visitors are of most interest in terms of gambling behavior since the opening of slot gaming facilities in the past two years. An analysis of respondents also gambling in Pennsylvania, a total of 183 individuals, shows that – although this is a small sample that requires caution when reaching conclusions as to the larger population – there are many similarities with the typical Atlantic City visitor. The Atlantic City visitor also gambling in Pennsylvania travels by car (76.5%), comes a median of 10 times annually and spends a median 8 hours gambling in Atlantic City. The most prominent differences are a higher proportion of player loyalty club members (86.9%), package purchasers (34.2%), and males (45.4%) in this important segment. Significantly, visitors who also gamble in Pennsylvania are as satisfied as the typical Atlantic City visitor[19].

Figure 102 – Visitors Also Gambling in Pennsylvania Segment Profile

Key numeric measures: PA Gamblers (183 responses)	Mean	Median	Mode
Age	55	53	51
No. of annual visits	20.7	10	12
Meals eaten	3.7	2	2
Casinos Gambled During Visit	2.5	2	2
Loyalty Cards Carried	3.6	3	2
Hours Gambling	19.0	8	8
Nights Stayed	2.2	2	2
Total Hours in Atlantic City	35.0	24	48
Adults in Party	2.8	2	2
No. of Those Under 21 in Party	0.2	0	0

[19] We reiterate that the intercept methodology, by definition, cannot capture Pennsylvania or other gamblers who have ceased visiting Atlantic City.

Key numeric measures: PA Gamblers (183 responses)			
Overnight Trips to Other Destinations	6.2	2	0
Planning Days	16.1	7	7

PA gamblers: spend per visit*	Mean, counting 0	Mean,not counting 0	Median, counting 0	Median,not counting 0	Mode, counting 0	Median, not counting 0
Gambling	$578	$601	$400	$400	$500	$500
F&B	$76	$122	$30	$100	$0	$50*
Shopping	$111	$272	$0	$100	$0	$100
Entertainment	$24	$134	$0	$100	$0	$100*
Lodging	$24	$254	$0	$170	$0	$59*
Travel	$36	$41	$12	$18	$0*	$5
Total Spending	$849	$849	$555	$555	$508	$508

*The mean, median and mode were respectively calculated two ways: including respondents who spent nothing (zero) in each category, and excluding those responses

PA gamblers: key trip characteristics	Category	Percentage
Travel Mode	Car	76.5%
	Bus	20.8%
	Other	2.7%
Stay Overnight	Overnight Guest	63.2%
	Day Tripper	36.8%
Those Who are Traveling as Part of Package	% Yes	34.2%

PA gamblers: demographic characteristics	Category	Percentage
Do You Smoke?	% Yes	26.8%
Marital Status	Married	56.3%
	Single	37.7%
Education	High school graduate or less	36.6%
	College graduate or more	49.9%
Empty Nester	Children <18	21.9%
Employment	Full-Time	54.9%
	Retired	31.3%
Occupation	Professional/Tech	55.6%
Household Income	% Under $100K	78.2%
	% Over $100K	16.2%
Ethnicity	White/Caucasian	71.4%
	African American	21.4%
	Asian	2.7%

PA gamblers: demographic characteristics	Category	Percentage
	Hispanic	2.7%
Gender	Male	45.4%
	Female	54.6%

PA gamblers: gambling patterns	Category	Percentage
Casino Gambling: Games Played	Slots	63.9%
	Tables	7.2%
	Both	28.3%
	Poker	0.6%
	Other	0.0%
Member of Player Loyalty Club	% Yes	86.9%
% Who Gamble Elsewhere	% Yes	100.0%

PA gamblers: attitudinal survey	Category	Percentage
Satisfaction levels with Atlantic City	Extremely Well/Very Satisfied	94.5%
Those Who View Atlantic City as 'More Attractive'	Agree/Strongly Agree	96.1%
Those Who View Atlantic City as 'Safe'	Agree/Strongly Agree	91.2%
% Likely to Revisit	Within Next 2 Yrs	93.4%
Those Who Would Recommend Atlantic City to others	% Yes	99.5%
Currently Visiting Atlantic City:	More Often	24.6%
	Less Often	7.1%

No outstanding satisfaction or comping issues are observed among Atlantic City visitors also gambling in Pennsylvania. They appear to be equally satisfied and visit nearly as often as typical visitors. The key difference is that twice the normal proportions of these visitors are coming to Atlantic City less frequently than the typical visitor.

That latter point is not surprising, given the alternative of new attractions that are often closer to home. However, we issue the additional cautionary note that this Atlantic City visitor profile cannot estimate the number of visitors who may have ceased visiting Atlantic City altogether. By definition, that group would not be available to participate in an intercept survey in Atlantic City. Additionally, as noted, visitors who are coming less frequently are also, by definition, less likely to be captured in such a survey.

FINDINGS: IDENTIFYING OPPORTUNITIES IN SEGMENTS

In examining the data provided in this study, our findings point to certain segments that offer long-term opportunities for Atlantic City, particularly in areas outside of gaming. Among these segments are shoppers and event attendees.

For example, event attendees have the following attributes:

- They are younger than the typical Atlantic City visitor: Their median age is 44, while the overall survey had a median age of 55.
- They are relatively affluent and well-educated, with more than 16 percent earning more than $100,000 a year.
- More than one-fifth would visit Atlantic City again, while less than a quarter of them gamble elsewhere.
- More than 90 percent view Atlantic City as becoming "more attractive," while more than 75 percent believe Atlantic City is "safe."

More important than these attributes, however, is the fact that they are significantly under-represented in the existing visitor base. Note that adults who come to visit Atlantic City with the primary purpose of attending a concert, show or similar event will visit about four times a year. This is one-third of the overall survey's median number of visits.

While it is unrealistic to expect that event attendees will double or triple their number of annual visits (there are significant supply constraints in everything from the number of venues to the available nights to the number of performers who could generate meaningful demand), the survey identifies less visible opportunities as well.

Less than half – 47.2 percent – are members of casino loyalty programs. Yet the median event attendee will gamble $100 per visit. (Eliminating those who do not gamble anything, the median gaming budget doubles to $200.)

Considering that 26.5 percent of all Atlantic City visitors cite casino mailings as a source for trip-planning information, any meaningful increase in the percentage of event attendees enrolled in loyalty programs presents an opportunity to gain increased visitation from an affluent, potentially loyal – and relatively untapped – segment of the market.

The median event attendee has an overall spend of nearly $400 per visit.

Similarly, shoppers represent an opportunity as well:

- The median age of shoppers is only 45, which is 10 years younger than the overall survey.
- They visit only six times a year, and have a median gambling budget of $100 per visit.[20]
- Shoppers are generally the most satisfied with Atlantic City, and – as noted earlier – every shopper surveyed would recommend Atlantic City to a friend.

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[20] This median is calculated only among shoppers who gamble something during their time in Atlantic City. The median drops to $20, when all shoppers are accounted for.

- More than 27 percent of all those identified as shoppers intend to return to Atlantic City, a relatively high level of loyalty.
- Shoppers include the highest percentage of minorities, the lowest percentage and are near the top in education levels, all segments that represent long-term opportunities for Atlantic City.
- Only 56.7 percent of shoppers are enrolled in casino loyalty programs, an indicator of opportunity to cultivate loyalty and return visitation.

Loyalty programs at casinos do indeed represent an opportunity to generate repeat visitation. Adults who sign on to such programs can receive a variety of promotions, depending on factors such as their estimated gambling value per visit.

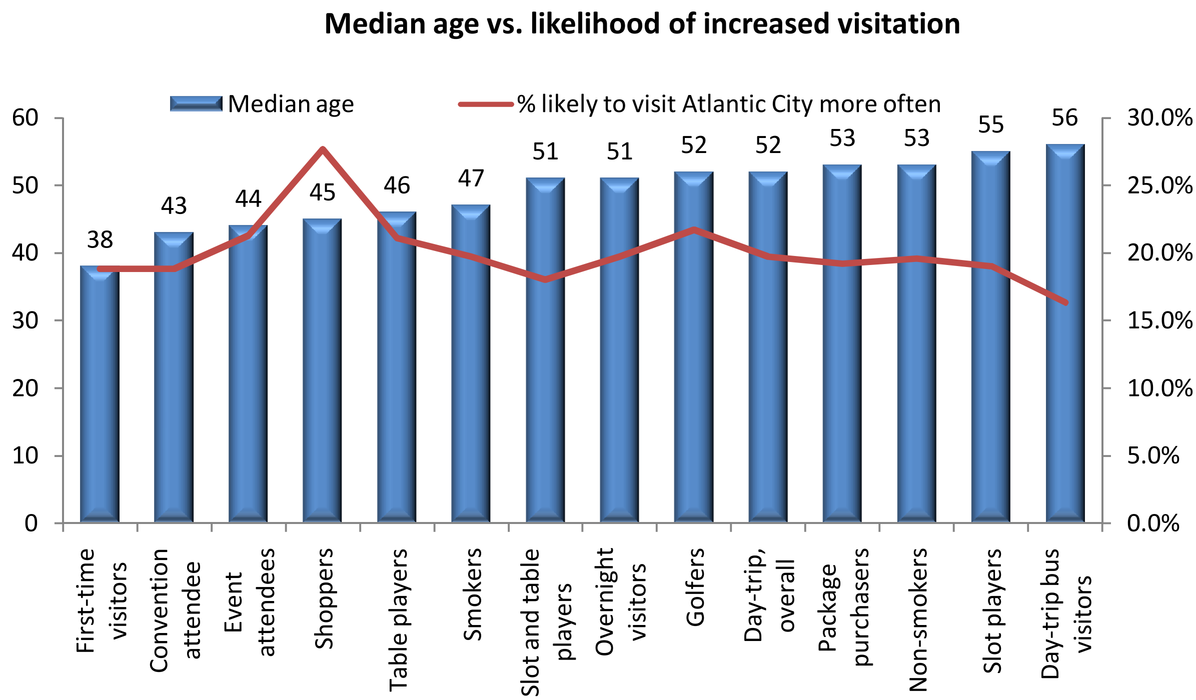
With that in mind, first-time visitors represent an enormous opportunity for future visitation:

- They are clearly among the youngest visitors, with a median age of 38.
- Only 21.2 percent of this group is presently enrolled in a loyalty program.
- They are highly satisfied with Atlantic City. The ratio of those who intend to visit more often vs. those who intend to visit less often is nearly 5-1.

Spectrum cautions, however, that the low sample size of first-time visitors (114 responses) should limit any widespread extrapolation of their preferences. Still, the survey shows that Atlantic City offers the ability to attract new customers, and broaden its appeal.

This group is particularly noteworthy because of its relative youth. The younger the demographic, the greater the long-term opportunity for a market. The following chart tracks the median age of certain segments of the visitor base, and contrasts that with their intent to visit in the future:

Figure 103 – Comparing age, likelihood of visitation



This chart offers some insights that are both intuitive and counter-intuitive, and – from the standpoint of Atlantic City businesses – provides some insights that should be encouraging for future business. (We add the cautionary note that these categories are not mutually exclusive. Adults can fit into multiple segments.)

Convention attendees, event attendees and shoppers – like first-time visitors – are noticeably younger, and indicate that they will return to Atlantic City. Those are all segments motivated primarily by non-gaming attractions.

Table players are younger than the overall median (and are younger than slot players), and indicate a willingness to return. However, note that much of the gaming competition in the eastern United States in recent years has been through the addition of slots, not table games.

That may change in coming years, as states from Delaware to Pennsylvania consider adding table games. Consequently, table players may not prove to be as loyal to Atlantic City once their available options increase.

The survey supports that cautionary note. Las Vegas receives 40.9 percent of Atlantic City table players' visits to other markets, while Connecticut gets 14.9 percent. Pennsylvania – which presently only offers electronic table games – gets only 7.8 percent of such visits.

The chart above also offers some insights that are counter-intuitive: Smokers are more likely to return to Atlantic City than non-smokers. This comes despite the increasingly tightened limits on smoking in Atlantic City casinos – limits that will become an outright ban in October 2008.

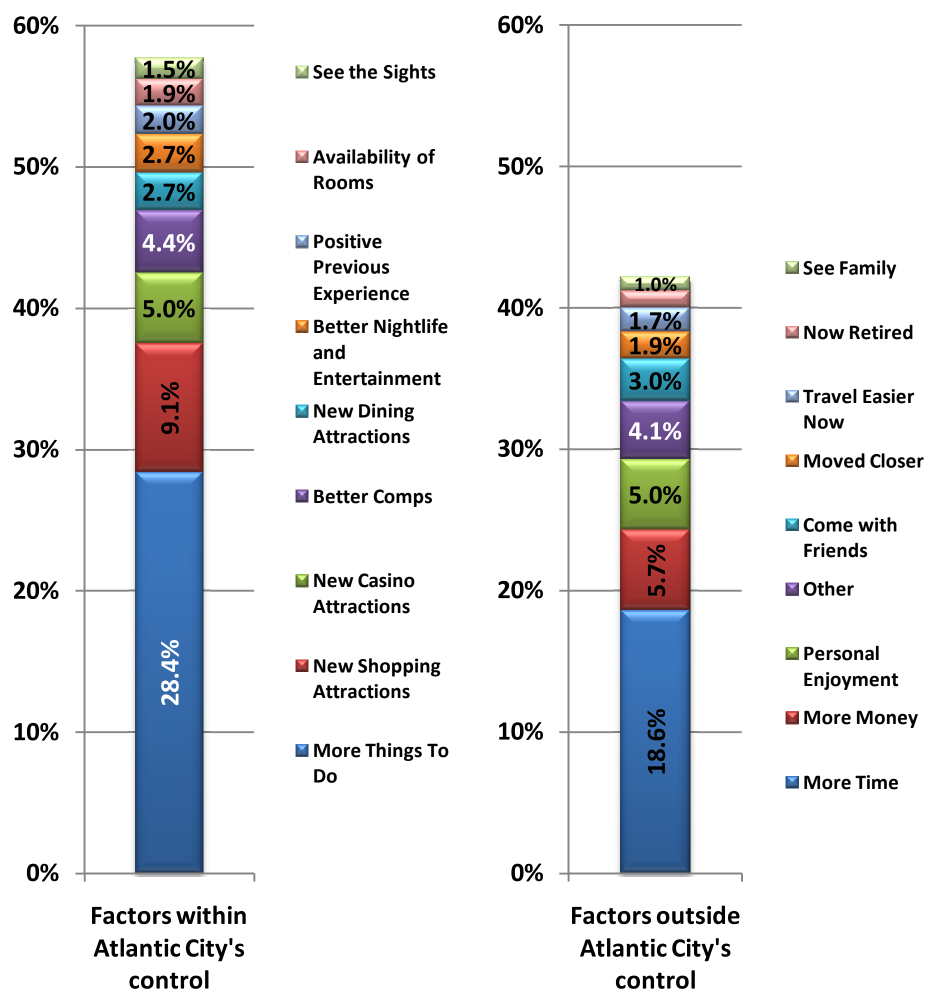
This can, to some degree, be reflective of the concept that smokers do not want to be around smoke, as well as the perception that non-smokers view Atlantic City at the time of the survey as relatively smoke-filled. It would also support the notion that smokers do not necessarily seek out smoking environments when making leisure-time choices.

VISITING MORE, LESS OFTEN: AN ANALYSIS

This section of the analysis breaks down the reasons as to why visitors may – or may not – be increasing or decreasing their level of visitation. We categorized the stated reasons two ways, by asking a basic question: What are the factors that are potentially within the control of the public and private sectors in Atlantic City?

The first two charts categorize the reasons why people are visiting Atlantic City more often. On the left, are the reasons that can be ostensibly influenced by the public and private sectors in the region. On the right are those reasons that are clearly beyond such influence.

Figure 104 – Reasons for visiting 'more often'

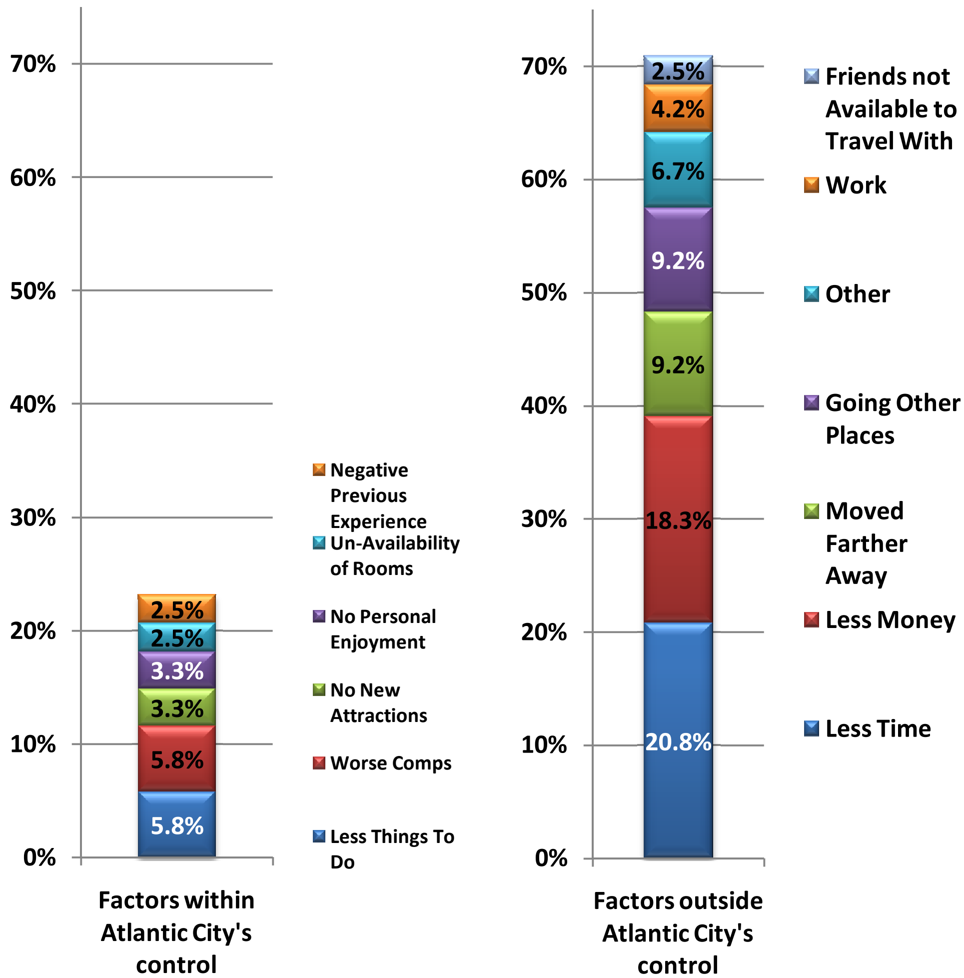


Note that, based on percentage values, the reasons that can be influenced exceed those that cannot be influenced by a ratio of 58-42. Within the reasons given that can be influenced are a range of factors that are likely to improve in coming years, such as the additional availability of rooms, and better nightlife and entertainment. Essentially, as visitors find "more things to do" (the largest category, but also a catch-all that could arguably encompass other factors as well), visitation should increase.

Demographic changes overall should also positively impact such trends. As more baby-boomers reach retirement age, it will translate into more available time.

The next charts contrast the reasons why some visitors are coming less frequently to Atlantic City:

Figure 105 – Reasons for visiting 'less often'



Note that the factors outside the control of the public and private sectors outweigh factors that can ostensibly be influenced by a ratio of nearly 3-1, as measured by total percentage. Additionally, some of the factors that can be influenced are effectively perception-related, such as "less things to do" and "no new attractions."

Some visitors also look at business decisions – such as issuing complimentaries – and either agree or disagree with such policies. To a large degree, such disagreements will always be there. Additionally, it may be likely that a large percentage of those who have had a negative experience have lost money gambling during the visit.

Still, in both segments of the study, the availability of hotel rooms and other attractions are factors behind visitation decisions, and as these assets increase in availability, it should spur incremental visitation.

PUTTING THE STUDY IN PERSPECTIVE: OPPORTUNITIES FOR FUTURE GROWTH

Our study highlights some marketing opportunities that could yield increased visitation and spending by existing customers. Still, a visitor profile study offers limited insights into why certain segments of the population are not visiting Atlantic City. The study examines the attitudes and attributes of people who are visitors. By definition, adults who are not visiting will not be represented in a visitor profile study.

To gain a better understanding of why some adults are not visiting, we have to put our study in a much broader context, looking at a combination of broad demographic breakdowns, as well as similar surveys in other gaming markets.

Households where the income is greater than $150,000 account for 4 percent of the U.S. population, but they account for 11 percent of consumer spending.[21] As of last year, households with income greater than $150,000 spent $7,500 annually on entertainment, more than five times the level of spending on entertainment by households earning $70,000 or less. According to Ypartnership, the number of Americans with a net worth of more than $1 million is now 9 million, up from 6 million three years ago. That represents a 50 percent increase in the number of adults who have reached that important benchmark of affluence. Indeed, Ypartnership notes that there are more millionaires in the United States than there are unemployed adults.

The number and proportion of affluent adults is expected to increase significantly. By 2010, more than a quarter of U.S. households will be earning more than $100,000 annually.

In Atlantic City, here is a breakdown of visitor representation by income:

Figure 106 – Income by Visitation Segment

Income Level	Atlantic City Visitor Profile 2008 weighted	Gaming customers	General Tourist	Conv. Attendee	Event Attendee	Retail customers	Package Purchaser
< $20K	3%	2%	3%	1%	3%	6%	1%
$20-$29K	9%	7%	7%	5%	6%	3%	2%
$30-$39K	15%	13%	9%	6%	10%	10%	7%
$40-$49K	13%	13%	8%	9%	14%	5%	10%
$50-$59K	13%	13%	11%	12%	8%	16%	15%
$60-$69K	9%	10%	11%	12%	12%	9%	17%
$70-$79K	12%	13%	13%	12%	13%	13%	13%
$80-$89K	4%	4%	5%	7%	6%	0%	5%
$90-$99K	4%	4%	4%	7%	6%	9%	5%

[21] U.S. Bureau of Labor Statistics

Income Level	Atlantic City Visitor Profile 2008 weighted	Gaming customers	General Tourist	Conv. Attendee	Event Attendee	Retail customers	Package Purchaser
$100K - $149K	7%	8%	12%	11%	9%	2%	11%
Over $150K	7%	8%	10%	10%	7%	9%	9%
unknown	5%	5%	7%	8%	7%	18%	5%

This clearly shows that Atlantic City is making some inroads into the wealthier income brackets. The most attractive income segments found in the Visitor Profile Study include general tourists, convention visitors, and those visitors who are trending toward more frequent visitation.

Figure 107 – Most Attractive Visitation Segments by Income

Income Level	Atlantic City Visitor Profile 2008 weighted	Gaming customers	General Tourist	Conv. Attendee	Event Attendee	Come More Often	Package Purchaser
< $90K	81%	79%	71%	71%	77%	76%	75%
> $100K	14%	16%	21%	21%	16%	19%	20%
unknown	5%	5%	8%	8%	7%	5%	5%

If the marketing strategy espoused by the ACCVA and others, such as Borgata, continues to be implemented, it should pay dividends in the form of attracting greater numbers of adults with higher levels of disposable income. Consider the following chart, which shows data that Borgata supplied to us approximately one year after its opening in July 2003. We have compared the demographics that Borgata was able to glean from its database, with our demographic breakdown of the same age group:

Figure 108 – Travel Segments by Age Category

Ages	Borgata	Atlantic City visitor base 2004	Atlantic City Visitor Profile 2008	Gaming customers	General Tourist	Conv. Attendee	Retail customers
21-24	5%	3%	3%	3%	5%	8%	9%
25-39	20%	12%	17%	14%	19%	31%	31%
40-54	25%	20%	28%	30%	42%	42%	31%
55-62	17%	25%	20%	23%	17%	14%	16%
63-73	16%	23%	19%	21%	13%	4%	12%
over 74	8%	9%	12%	11%	4%	1%	0%
unknown	9%	8%	1%	1%	0%	0%	0%

This chart indicates that more upscale and diverse capital investments – accompanied by comprehensive marketing strategies – will allow Atlantic City to yield the following:

- Attract younger adults
- Attract a broader variety of adults who seek various entertainment experiences
- Attract wealthier adults

We also suggest that this trend holds the potential to feed on itself, in that more adults who report a positive experience in Atlantic City will engender even more visits from an expanding customer base, which would also encourage greater capital investment in Atlantic City.

This part of the analysis suggests that Atlantic City should cement its position as the capital of East Coast gaming. We note that none of the states in the Mid-Atlantic region that has approved – or is likely to approve – casinos is following the Atlantic City model, which is characterized by a low tax rate and a concentration of capital in one location. The low tax rate offers an advantage over other markets in that more capital would be freed up for non-gaming investments. Essentially, by becoming the capital of regional gaming, Atlantic City would open itself up to more non-gaming spending by adults throughout the region.

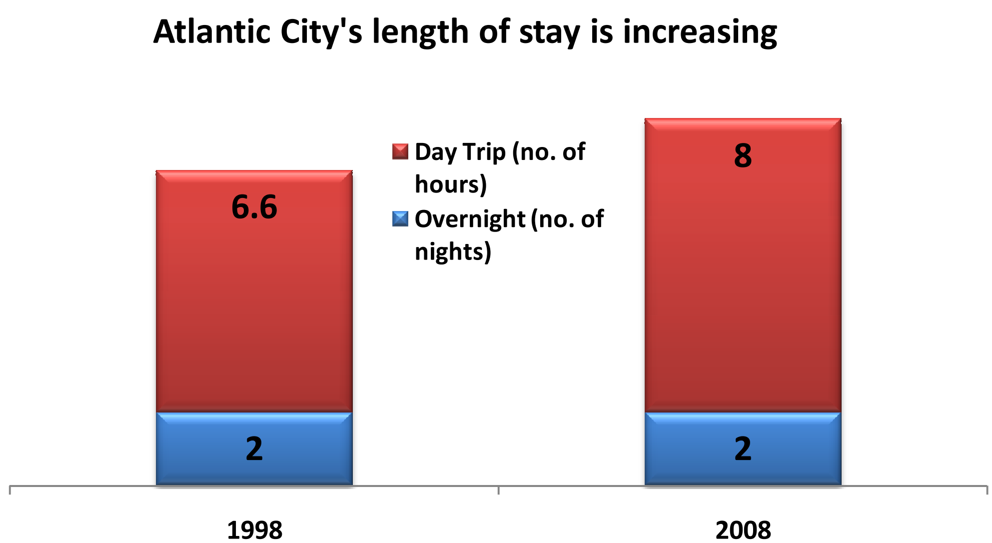
Note that the duration of most visits to Atlantic City is rather short, as demonstrated in the following table. Only the segments that reflect strong overnight stays such as convention attendees, general tourists, and package purchasers, display trip durations greater than 10 hours.

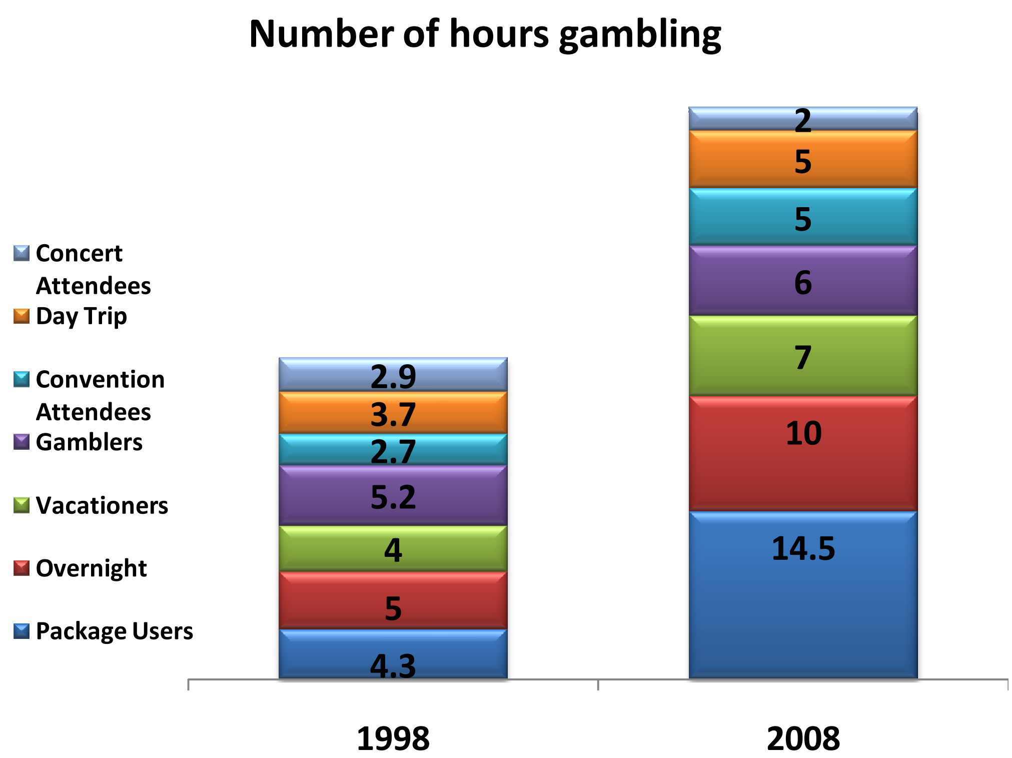
Figure 109 – Trip Duration by Visitation Segment

Trip Duration	Atlantic City Visitor Profile 2008	Gaming customers	General Tourist	Conv. Attendee	Event Attendee	Shopper	Package Purchaser
Median # Hours in Atlantic City	8	24	36	48	10	7	52

To put this length of stay in perspective, we compared the overall stay in 1998 with those of 2008:

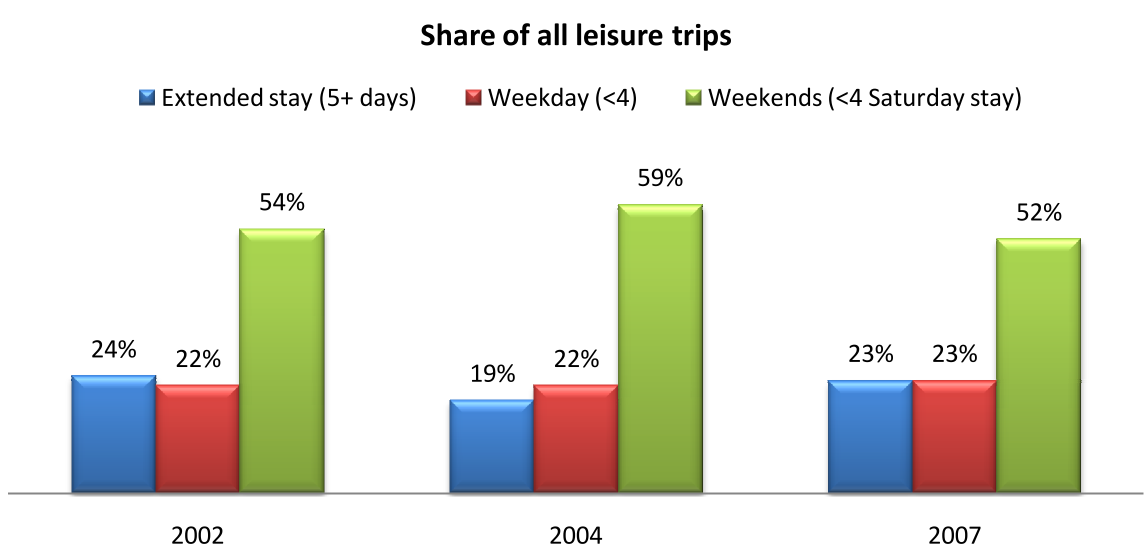
Figure 109-A – Length of stay, 10-year comparison





While measuring the length of visits in terms of a few hours might appear to be a negative, it can actually be a strength, considering how many adults have relatively little free time:

Figure 110 – Share of All Leisure Trips



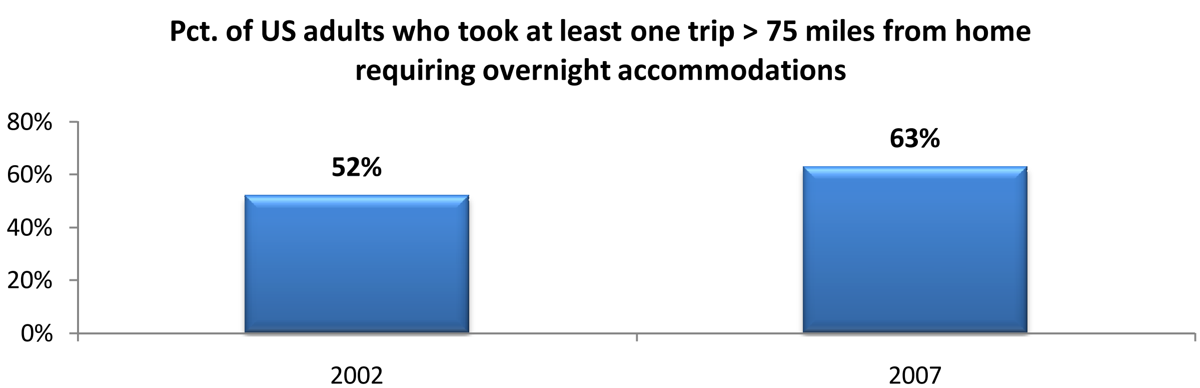
Source: Ypartnership

In recent years, the number of vacations that would be considered traditional – those lasting five days or more – accounts for less than one in four leisure trips. A resort such as Atlantic City, which caters to shorter stays, can actually take advantage of even more such stays. This trend, combined with the data from our visitor profile study, would indicate that Atlantic City can best benefit by focusing on adults who are seeking shorter stays. This is already a strength that Atlantic City enjoys and can further leverage to gain greater market share among adults, living in the Northeast, who are seeking a leisure experience.

These same people like to travel, and the trends – set by the country's aging Baby Boomer population – are encouraging for expenditures on retail and travel. Some 80 percent of travel is done by Baby Boomers, who control 75 percent of the nation's wealth, according to Ypartnership. By 2030, they will represent 20 percent of the population. They will control 40 percent of the nation's disposable income and 77 percent of private investments.[22] Travelers in which the household income exceeds $132,000 took an average of eight out-of-town trips per year, with Las Vegas competing for five of those trips.

As the following chart shows, while the number of out-of-town trips requiring overnight stays has increased, the constraints on time have not been loosened:

Figure 111 – Percentage of Adults Making Overnight Trips



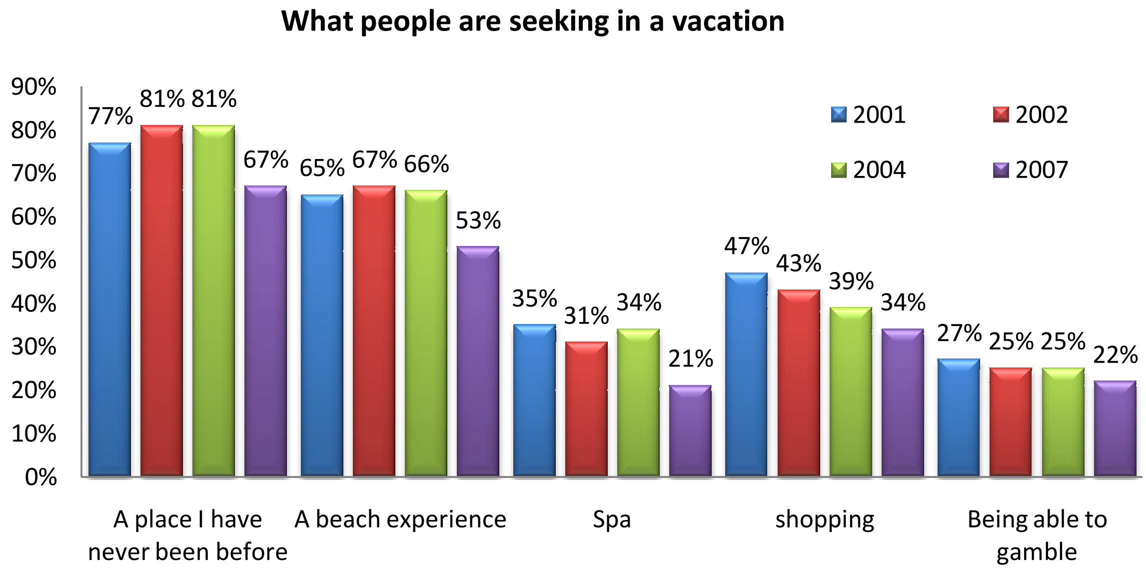
Source: Ypartnership

Our survey does not suggest that Atlantic City could – or should – compete against Las Vegas or other resorts for the extended-stay visits, but could clearly make further inroads in the out-of-town trips that are time-constrained.

The next chart shows key attributes that adults are seeking in a vacation:

[22] Ypartnership

Figure 112 – Vacation Attributes



Source: Ypartnership

Given Atlantic City's natural attributes, growing non-gaming amenities and the continued potential to reach still untapped share of the regional population, the resort remains viably positioned, despite challenges, to achieve both visitation growth and economic stability.

REGIONAL ANALYSIS

This section of the report examines visitation on a geographic basis, focusing on the key feeder markets to Atlantic City.

Individual US ZIP codes were aggregated into regional and state categories in order to perform this analysis. New England is composed of Maine, New Hampshire, Massachusetts, Rhode Island, and Connecticut ZIP codes. New York and New Jersey are made up of state specific ZIP codes. Pennsylvania comprises both Pennsylvania and Delaware ZIP codes.

The charts below show the value in reaching visitors beyond New Jersey, with a particular emphasis on the value of overnight visitors:

Figure 113 – Gambling budget, day and overnight: by state, region

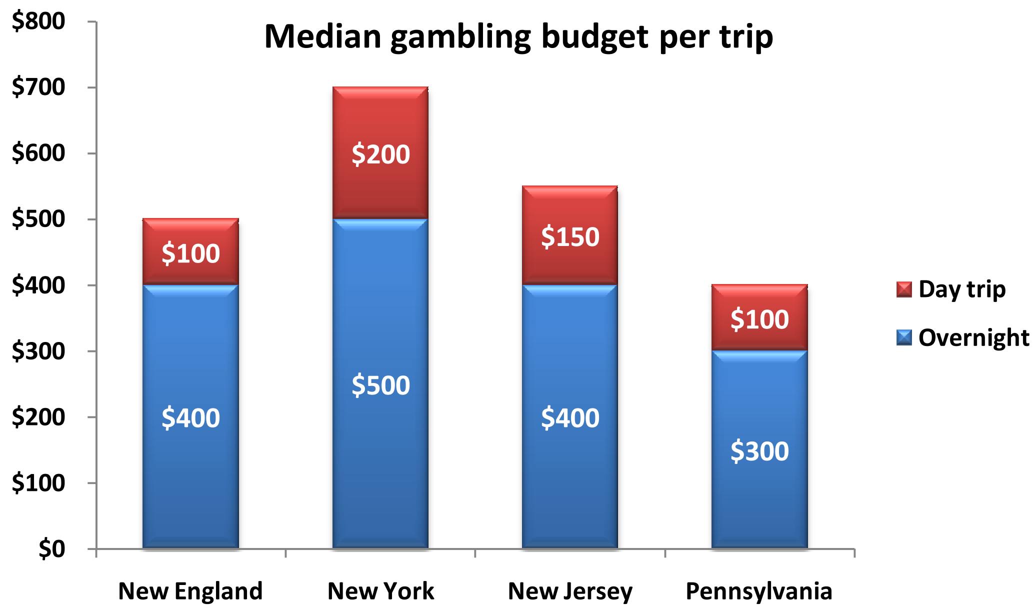


Figure 114 – Food and beverage budget, day and overnight: by state, region

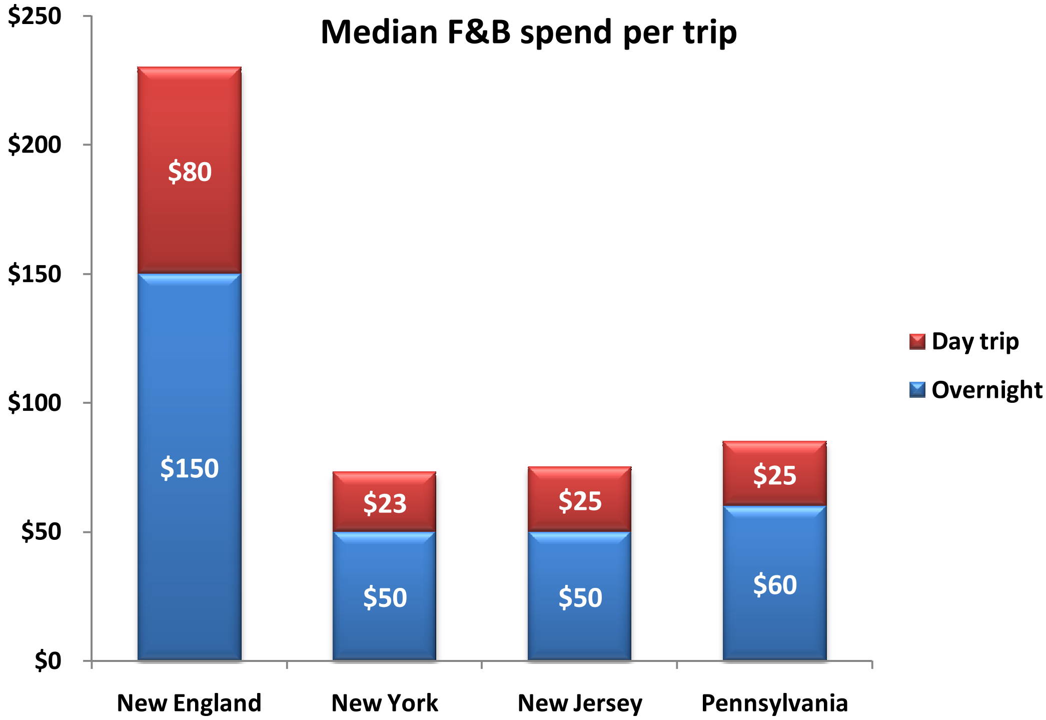
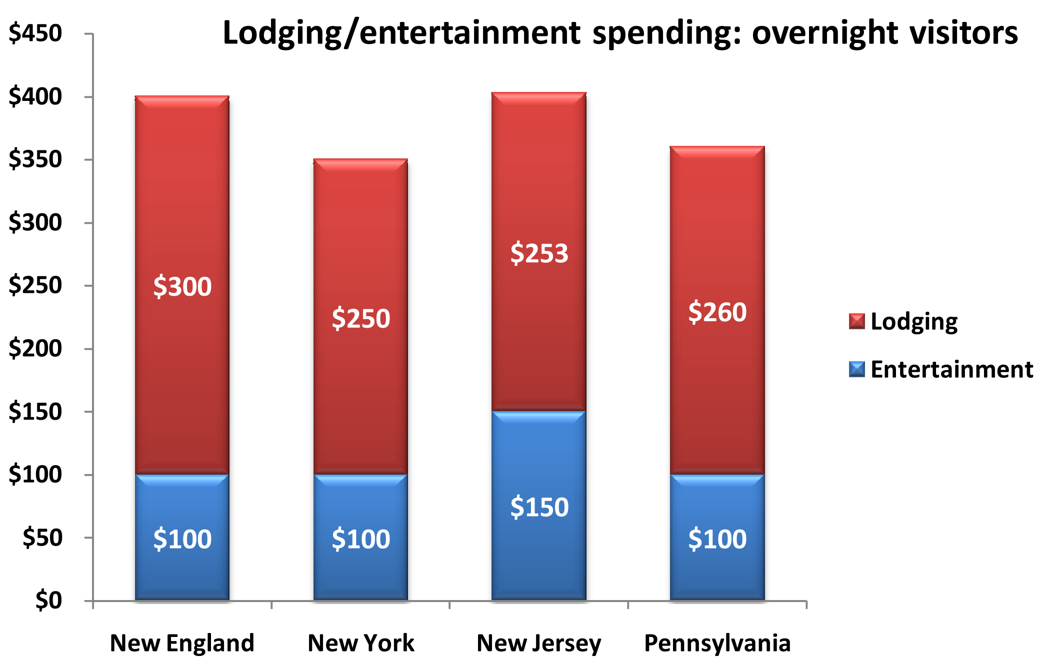


Figure 115 – Lodging/entertainment spending by overnight visitors: by state, region



ABOUT SPECTRUM GAMING GROUP

Spectrum Gaming Group, founded in 1993, is an independent research and professional services firm serving public- and private-sector clients worldwide. Our principals have backgrounds in gaming operations, economic analysis, law enforcement, due diligence, regulation, compliance and journalism.

Spectrum holds no beneficial interest in any casino operating companies or gaming equipment manufacturers or suppliers. We employ only senior-level executives and associates who have earned reputations for honesty, integrity and the highest standards of professional conduct. Our work is never influenced by the interests of past or potentially future clients.

Each Spectrum project is customized to our client's specific requirements and developed from the ground up. Our findings, conclusions and recommendations are based solely on our research, analysis and experience.

Among our most recent public-sector clients are the Connecticut Division of Special Revenue, Massachusetts Office of Housing and Economic Development, Broward County (FL), West Virginia Lottery Commission, the New Jersey Casino Reinvestment Development Authority, the Atlantic City Convention and Visitors Authority, the Singapore Ministry of Home Affairs, Rostov Oblast (Russia), and the Puerto Rico Tourism Company. Recent private-sector clients include the Casino Association of New Jersey, Harrah's Entertainment, Morgan Stanley, Pokagon Band of Potawatomi Indians, and the Seneca Nation of Indians.

We maintain a network of leading experts in all disciplines relating to the gaming industry, and we do this through our offices in Atlantic City, Bangkok, Guangzhou, Harrisburg, Hong Kong, Las Vegas, Macau, Manila and Tokyo.

About EEJ Research

Founded in 1998, EEJ Research is a full service marketing research and consulting firm specializing in the fields of casino gaming, tour and travel, financial services, and customer service quality. The firm provides extensive experience and expertise in primary market research focusing upon the identification and measurement of customer expectations, the formulation and evaluation marketing strategy and effectiveness, and the development and ongoing assessment of service delivery systems.

EEJ Research offers professional qualitative and quantitative capabilities in both traditional and online research methods. Gene Johnson, principal of the firm, has more than 15 years experience in the field and has developed a wide ranging network of industry associates and a broad variety of research capabilities to meet the needs of an extremely diverse client base.

APPENDIX: SURVEY QUESTIONNAIRE

2007-2008 Atlantic City Visitor Profile Survey

1 INTERVIEWER CONFIRM:

Are you at location [@LocSelect]?
[LocConfirm]

1	Yes
2	No

LocSelect
2 Please select your location
[LocSelect]

1	Hilton
2	Bally's
3	Borgata
4	Caesars
5	Harrah's
6	Resorts
7	Showboat
8	Tropicana
9	Trump Marina
10	Trump Plaza
11	Trump Taj Mahal
12	Sheraton
13	Flagship
14	Atlantic Palace
15	Seaview
16	Walk
17	Pier
18	Quarter
19	Boardwalk
20	Convention Center
21	Boardwalk Hall

A4
3 Hello, my name is ______________ and I represent the Spectrum Gaming Group. We are doing a survey
for the Atlantic City Convention & Visitors Authority. The ACCVA is surveying Atlantic City visitors in 2007
and would like to include your opinions in the study. We have a free gift to thank people who participate.
The interview typically lasts about 10 minutes. Your answers are strictly confidential and will be used for
research purposes only. Would you like to participate in the survey? OK, thanks.
B1
4 B1. First, are you a resident of Atlantic City?
[B1]

1	Yes
2	No
3	Refused

B2

5 B2. Do you regularly commute to a job located in Atlantic City or do business with casinos in Atlantic City?

[B2]

1	Yes
2	No
3	Refused

B3

6 B3. IF NOT CERTAIN, ASK: Are you 21 or older?

If answer is NO - terminate.

C1

7 C1. The first questions are about this trip to Atlantic City. Did you come here today by car, by bus, or some other way?

[C1]

1	Car
2	Bus
3	Other

C1B

8 C1B. If not by car or bus, how did you arrive here?

[C1B]

1	A.Train
2	B.Air
3	C.Boat
4	D.Other

C2

9 C2. When did you last visit Atlantic City? [RECORD YEAR]

[C2]

1	2008
2	2007
3	2006
4	2005
5	2004
6	2003
7	2002
8	2001
9	2000
10	1999
11	1998
12	1997
13	1996
14	1995
15	1994
16	1993
17	1992

18 1991
19 1990
20 1989
21 1988
22 1987
23 More Than 20 Years Ago
24 First Visit
25 Don't Know/Can't Remember

C2B

1
0 C2B. Including this trip, how many times have you visited Atlantic City in the past 12 months?
(IF UNSURE SAY "Your best estimate is fine.")
[C2B]
Answer:

C3

1
1 C3. What was the PRIMARY PURPOSE of this trip to Atlantic City?
[C3]

1 Gamble
2 Attend or work at a convention
3 Attend or work at a trade show
4 Attend a corporate meeting or other business purposes
5 Vacation / Pleasure
6 Visit friends or relatives
7 Attend a concert, show, or special event
8 Walk on the Boardwalk
9 Go Shopping at stores in Atlantic City
10 Go to the beach
11 Play golf at one of the courses around Atlantic City
12 OTHER

C3A

1 C3A. Is the convention, trade show, or corporate meeting you are attending at the Convention Center,
2 a
casino hotel, or a non-casino hotel?
[C3A]

1 AC Convention Center
2 Casino Hotel
3 Non-Casino Hotel
4 Other

C3B

1 C3B. Were you MORE or LESS interested in attending this convention, trade show, or corporate
3 meeting
because it was held in Atlantic City, or did it make NO DIFFERENCE to you that it was held in Atlantic City?
[C3B]

1 More Interested
2 Less Interested

3 No Difference
4 Not Sure

C4

14 C4. How important were each of the following in your decision to visit Atlantic City? Please answer this question using a 5-point scale where 1 means "Not At All Important" and 5 means "Extremely Important."

	1	2	3	4	5	N/A
Gambling [C4.Gambling]						
Shopping [C4.Shopping]						
Dining and Restaurants [C4.Dining_and_Restauran]						
Shows and Entertainment [C4.Shows_and_Entertainm]						
Clubs and Nightlife [C4.Clubs_and_Nightlife]						
Room Availability & Rates [C4.Room_Availability___]						
Beach & Boardwalk [C4.Beach___Boardwalk]						
Golfing [C4.Golfing]						
Availability of bus or train service (to Atlantic City) [C4.Availability_of_bus_]						
Convenience of Atlantic City (as a destination) [C4.Convenience_of_Atlan]						
Ease of travel (to and within Atlantic City) [C4.Ease_of_travel__to_a]						
Ease of parking [C4.Ease_of_parking]						

Answer Scale:
1. 1 - Not At All Important
2. 2 - Not Very Important
3. 3 - Important
4. 4 - Very Important
5. 5 - Extremely Important
6. 6 - N/A

C4A

15 C4A. You mentioned shopping… Where will/did you shop?

1 The Walk / AC Outlets [C4A.The_Walk___AC_Outlet]
2 The Pier at Caesars [C4A.The_Pier_at_Caesars]
3 The Quarter at Tropicana [C4A.The_Quarter_at_Tropi]
4 In the Casinos [C4A.In_the_Casinos]
5 Boardwalk

[C4A.Boardwalk]
6 Other Retail Locations in AC
[C4A.Other_Retail_Locatio]
C4C
1
6 C4C. You mentioned golfing. Where will/did you golf?
1 AC Country Club
[C4C.AC_Country_Club]
2 Blue Heron Pines
[C4C.Blue_Heron_Pines]
3 Seaview
[C4C.Seaview]
4 Links at Brigantine Beach
[C4C.Links_at_Brigantine_]
5 May Landing Country Club
[C4C.May_Landing_Country_]
6 Sand Barrens
[C4C.Sand_Barrens]
7 Harbor Pines
[C4C.Harbor_Pines]
8 Shore Gate
[C4C.Shore_Gate]
9 Twisted Dune
[C4C.Twisted_Dune]
10 OTHER
[C4C.OTHER1]
C5
1
7 C5. How many meals will you enjoy during your stay?
[C5]
Answer:
C5A
1
8 C5A. Where will you eat?
1 Casino Restaurant
[C5A.Casino_Restaurant]
2 Casino Buffet
[C5A.Casino_Buffet]
3 Casino Players Club
[C5A.Casino_Players_Club]
4 At a Non-Casino Hotel
[C5A.At_a_Non_Casino_Hote]
5 On the Boardwalk
[C5A.On_the_Boardwalk]
6 At the Pier
[C5A.At_the_Pier__across_]
7 In the Walk
[C5A.In_the_Walk__between]
8 In the Quarter

[C5A.In_the_Quarter__by_T]
9 Somewhere else in Atlantic City
[C5A.Somewhere_else_in_At]
10 Not Sure/Refused
[C5A.Not_Sure_Refused]

C6A1
1
9 C6. Here is a list of the casinos in Atlantic City - Which one did you visit first?
[C6A1]

1 HILTON
2 BALLY'S
3 BORGATA
4 CAESAR'S
5 HARRAH'S
6 RESORTS
7 SHOWBOAT
8 TROPICANA
9 TRUMP MARINA
10 TRUMP PLAZA
11 TRUMP TAJ MAHAL

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C6A2
2
0 What other properties will you visit?

1 HILTON
[C6A2.HILTON]
2 BALLY'S
[C6A2.BALLY_S]
3 BORGATA
[C6A2.BORGATA]
4 CAESAR'S
[C6A2.CAESAR_S]
5 HARRAH'S
[C6A2.HARRAH_S]
6 RESORTS
[C6A2.RESORTS]
7 SHOWBOAT
[C6A2.SHOWBOAT]
8 TROPICANA
[C6A2.TROPICANA]
9 TRUMP MARINA
[C6A2.TRUMP_MARINA1]
10 TRUMP PLAZA
[C6A2.TRUMP_PLAZA]
11 TRUMP TAJ MAHAL
[C6A2.TRUMP_TAJ_MAHAL]

C6A3
2
1 In how many of these casinos will you gamble?

[C6A3]
Answer:
C6B
2
2 C6B. What types of games do you play most often?

[C6B]

1	Slots
2	Table Games
3	Both Slots and Table Games
4	Card Poker
5	OTHER
6	DK/Refused

C6C
2
3 C6C. On average, how many hours did/will you spend gambling on this trip?
[C6C]
Answer:
C7A
2
4 C7A. On this visit, did you or will you stay overnight or will you return home without spending the night?
[C7A]

1	Stay Overnight
2	Return Home
3	Don't Know/Refused

C7B
2 C7B. On this visit, have you or will you spend the night in a casino hotel, a non-casino hotel, a private
5 or
rental property, or will you return home without spending the night?
[C7B]

1	Casino Hotel
2	Non-Casino Hotel
3	Private or Rental Property
5	Refused

C8
2
6 C8. How many nights will you stay in the hotel?
[C8]
Answer:
C10
2
7 C10. How did you arrange your stay?
[C10]

1	Travel Agent / Tour Operator
2	Directly with Hotel or Property
3	Thru an Internet web site.
4	Thru my Convention or Trade Group
7	Comp / Promo
8	Casino Host

9 OTHER
10 NOT SURE / REFUSED

C11
2
8 C11. Is the trip a package that includes arrangements for such things as lodging, transportation, meals, and entertainment for one inclusive price?
[C11]
1 Yes
2 No

C12
2
9 C12. Is this non-casino hotel or private or rental property:
[C12]
1 In AC
2 Outside AC
3 In Cape May County
4 Elsewhere

C14
3 C14. From the time you arrived until you leave, how many total hours will you spend in Atlantic City
0 during
this visit? Your best estimate is fine.

IF RESPONSE GIVEN IN DAYS CONVERT TO HOURS
[C14]
Answer:

C16
3
1 C16. Including yourself, how many adults are in your immediate party?
(Please include adult - age 21 or older - relatives and friends who are traveling with you. If you are with a
tour group please count yourself and others in your immediate party but not the entire tour group.)
[C16]
Answer:

C17
3
2 C17. Is anyone in your immediate party are under age 21?
[RECORD HOW MANY]
[C17]
Answer:

C18
3
3 C18. In general, when you are planning a trip to Atlantic City, where do you find out where to stay and what to do and how to get there?
1 Friends
[C18.Friends]
2 Family
[C18.Family]
3 Local Newspapers
[C18.Local_Newspapers]

4 Internet
[C18.Internet]
5 Casino Mailings
[C18.Casino_Mailings]
6 Casino Host
[C18.Casino_Host]
7 Call Casino
[C18.Call_Casino]
8 Previous Experience/ Frequent Visitor
[C18.Previous_Experience]
10 Do Not Plan
[C18.Do_Not_Plan]
11 Other
[C18.Other1]
12 Don't Know
[C18.Don_t_Know]

C18A
3
4 C18A. Which of those is the most important information source?
[C18A]

1	Friends
2	Family
3	Local Newspapers
4	Internet
5	Casino Mailings
6	Casino Host
7	Call Casino
8	Previous Experience/ Frequent Visitor
10	Do Not Plan
11	Other
12	Don't Know

C19
3
5 C19. Which of the following Internet Web sites did you use?
[C19]

1 Gen'l Travel Rez Website like Travelocity, Expedia or Triple A
2 Specific Casino or Hotel Web Site
3 Atlantic City tourism website www.atlanticcitynj.com
4 OTHER

C20
3
6 C20. Before I mentioned it, had you ever heard of www.atlanticcitynj.com?
[C20]

1 Yes
2 No

C21
3 C21. What did you find most useful on the www.atlanticcitynj.com web site?

7

1 Attractions
[C21.Attractions]
2 Calendar of Events / Entertainment Guide
[C21.Calendar_of_Events__]
3 Travel Directory
[C21.Travel_Directory]
4 Hotel Guide / Accommodations
[C21.Hotel_Guide___Accomm]
5 Casino Directory/Guide
[C21.Casino_Directory_Gui]
6 Restaurant Directory / Dining Guide
[C21.Restaurant_Directory]
7 Nightlife & Entertainment
[C21.Nightlife___Entertai]
8 Golf/Recreation/Sports
[C21.Golf_Recreation_Spor]
9 Shopping Guide
[C21.Shopping_Guide]
10 Transportation Guide
[C21.Transportation_Guide]
11 Visitor's Guide
[C21.Visitor_s_Guide]
12 Discounts
[C21.Discounts]
13 Other
[C21.Other1]
14 N/A
[C21.N_A]

C22
3
8 C22. About how many days before this trip did you start planning your trip?
[C22]
Answer:

C23
3 C6A. How will you travel within and around Atlantic City? (to get to these different destinations
9 restaurants,
night clubs, shopping, golf, casinos)?

1 Drive
[C23.Drive]
2 Walk
[C23.Walk]
3 Jitney
[C23.Jitney]
4 Casino Shuttle
[C23.Casino_Shuttle]
5 NJ Transit Bus
[C23.NJ_Transit_Bus]

6 Taxi cab
[C23.Taxi_cab]
7 Other
[C23.Other1]

D1
4
0 D1. These next few questions are about your expenses during this visit to Atlantic City. Please be as specific as possible in your best estimate of the actual out-of-pocket costs but do not include the expenses
of others in your party unless they paid for you.
How much money do you think you will spend during this trip on the following:
RECORD DOLLAR AMOUNT. (IF UNSURE TAKE BEST ESTIMATE).

D1A
4
1 A. Gambling - (This would be your Personal Gambling Budget for this trip.)
[D1A]
Answer:

D1B
4
2 B. Food & Beverage - (This would be the cost of all meals, snacks, or beverages you ate or will eat during your trip (excluding comp value)
[D1B]
Answer:

D1C
4
3 C. Shopping - (This would mean all the retail purchases for gifts, clothes, etc. you make in stores or shops during your visit.)
[D1C]
Answer:

D1D
4
4 D. Entertainment - (This would be the cost of any concert or show tickets that you purchased.)
[D1D]
Answer:

D1F
4
5 F. Lodging - (This would be how much your room will cost you excluding tax, for the entire trip.)
[D1F]
Answer:

D1G
4
6 G. Travel Costs - (This would be how much you spent getting here and getting around Atlantic City during the trip EXCLUDING GASOLINE COSTS.)
[D1G]
Answer:

E1
4
7 E1. How satisfied are you overall with this visit to Atlantic City? Are you:
[E1]
1 Extremely Well Satisfied

2 Very Satisfied
3 Somewhat Satisfied
4 Not Very Satisfied
5 Extremely Dissatisfied
6 DK/Refused

E3A
4
8 Atlantic City is becoming a MORE ATTRACTIVE destination.
[E3A]

1 Strongly Agree
2 Agree Somewhat
3 Neither Agree or Disagree
4 Disagree Somewhat
5 Strongly Disagree
6 N/A

E3B
4
9 Atlantic City is a SAFE destination.
[E3B]

1 Strongly Agree
2 Agree Somewhat
3 Neither Agree or Disagree
4 Disagree Somewhat
5 Strongly Disagree
6 N/A

E5
5
0 E5. Is it likely that you will visit Atlantic City again in the next:
[E5]

1 In the Next Month
2 2 Months
3 3 Months
4 6 Months
5 12 Months
6 24 Months
7 Not Sure
8 Never Visit Again
9 Refused

E6
5
1 E6. Would you recommend Atlantic City to a friend or family member?
[E6]

1 Yes 2 No

E7
5 E7. How important were each of the following attributes in determining your level of satisfaction with
2 this
visit to Atlantic City? Please answer this question using a 5-point scale where 1 means “Not At All Important” and 5 means “Extremely Important.”

1 2 3 4 5 N/A

E7A

5 E7. How important were each of the following attributes in determining your level of satisfaction with
3 this
visit to Atlantic City? Please answer this question using a 5-point scale where 1 means "Not At All Important" and 5 means "Extremely Important."

1 2 3 4 5 N/A

Friendly Employees
[E7A.Friendly_Employees]
Customer Service Quality
[E7A.Customer_Service_Qua]
Safety & Security
[E7A.Safety___Security]
Hotel Accommodations
[E7A.Hotel_Accommodations]
Hotel Room Rate
[E7A.Hotel_Room_Rate]
The Shows and Entertainment
[E7A.The_Shows_and_Entert]
Shopping Experience
[E7A.Shopping_Experience]
Gaming Experience Overall
[E7A.Gaming_Experience_Ov]
Dining or Restaurant Experience
[E7A.Dining_or_Restaurant]
Convention or Trade Show Attendance Experience
[E7A.Convention_or_Trade_]
Traveling convenience, accessibility & cost
[E7A.Traveling_convenienc]
Non-Smoking Environment
[E7A.Non_Smoking_Environm]

Answer Scale:

1. 1 - Not At All Important
2. 2 - Not Very Important
3. 3 - Important
4. 4 - Very Important
5. 5 - Extremely Important
6. 6 - N/A

E8
5
4 E8. Do you smoke?
[E8]

1 Yes
2 No

E9
5
5 E9. Are you a member of any Atlantic City casino players clubs or do casinos usually rate your play at table games? Usually, you would have a player card from the casino.
[E9]

1 Yes
2 No

E9A
5 E9A. How many are you carrying?

6
[E9A]
Answer:
E9B
5
7 E9B. What kinds of free or discount offers will you be using on this trip?

1 Free (Comp) Room
[E9B.Free__Comp__Room]
2 Discount Room
[E9B.Discount_Room]
3 Room Package
[E9B.Room_Package]
4 Free (Comp) Meal
[E9B.Free__Comp__Meal]
5 Discount Meal
[E9B.Discount_Meal]
6 Bonus Cash / Cash Offer
[E9B.Bonus_Cash___Cash_Of]
7 Multiple Points Offer
[E9B.Multiple_Points_Offe]
8 Free Gift
[E9B.Free_Gift]
9 Sweepstakes Drawing
[E9B.Sweepstakes_Drawing]
10 Gaming Tournament
[E9B.Gaming_Tournament]
11 Party or Special Event
[E9B.Party_or_Special_Eve]
12 Free or Discount Entertainment/Show Tickets
[E9B.Free_or_Discount_Ent]
13 Discount Convention/Trade Show Admission
[E9B.Discount_Convention_]
14 Retail/Shopping Discount
[E9B.Retail_Shopping_Disc]
15 Golf Package
[E9B.Golf_Package]
16 OTHER
[E9B.OTHER1]
17 NONE
[E9B.NONE]
18 Not Sure / Don't Know Yet
[E9B.Not_Sure___Don_t_Kno]

E10
5
8 E10. During the past 12 months, about how many overnight trips have you taken to resort destinations other than Atlantic City?
[E10]
Answer:

E11
5
9 E11. Have you gambled anywhere else in the past 12 months?
[Have you gambled in a slot facility or casino anywhere other than Atlantic City in the past 12 months?]
[E11]

1	Yes
2	No

E12
6
0 E12. In which of the following locations did you gamble during the past 12 months?

1	Connecticut
[E12.Connecticut]	
2	Pennsylvania
[E12.Pennsylvania]	
3	Delaware
[E12.Delaware]	
4	Las Vegas or Other Nevada Casinos
[E12.Las_Vegas_or_Other_N]	
5	Riverboat or Midwest casinos
[E12.Riverboat_or_Midwest]	
6	Native American casinos
[E12.Native_American_casi]	
7	New York
[E12.New_York]	
8	Caribbean casinos
[E12.Caribbean_casinos]	
9	Cruise Ships
[E12.Cruise_Ships]	
10	Casinos in Canada or Detroit
[E12.Casinos_in_Canada_or]	
11	Asian casinos
[E12.Asian_casinos]	
12	Internet or Online Casinos
[E12.Internet_or_Online_C]	
13	Other casino locations
[E12.Other_casino_locatio]	

E13
6 E13. Are you currently coming to Atlantic City more often, less often, or about the same frequency as
1 you
did in the past?
[E13]

1	More Often
2	Less Often
3	Same Number of Times
4	DK/Refused

E14
6
2 E14. Why are you now coming MORE often?

1	More Time	17 Retired

[E14.More_Time]
2 More Money
[E14.More_Money]
3 More Things To Do
[E14.More_Things_To_Do]
4 New Casino Attractions
[E14.New_Casino_Attractio]
5 New Dining Attractions
[E14.New_Dining_Attractio]
6 New Shopping Attractions
[E14.New_Shopping_Attract]
7 Better Nightlife and Entertainment
[E14.Better_Nightlife_and]
8 Availability of Rooms
[E14.Availability_of_Room]
9 Personal Enjoyment
[E14.Personal_Enjoyment]
10 Positive Previous Experience
[E14.Positive_Previous_Ex]
11 Better Comps
[E14.Better_Comps]
12 Travel Easier Now
[E14.Travel_Easier_Now]
13 Moved Closer
[E14.Moved_Closer]
14 Come with Friends
[E14.Come_with_Friends]
15 See Family
[E14.See_Family]
16 See the Sights
[E14.See_the_Sights]

[E14.Retired]
18 Other
[E14.Other1]

E15
6
3 E15. Why are you now coming LESS often?

1 Less Time
[E15.Less_Time]
2 Less Money
[E15.Less_Money]
3 Less Things To Do
[E15.Less_Things_To_Do]
4 No New Attractions
[E15.No_New_Attractions]
5 Un-Availability of Rooms
[E15.Un_Availability_of_R]
6 No Personal Enjoyment
[E15.No_Personal_Enjoymen]
7 Negative Previous Experience

[E15.Negative_Previous_Ex]
8 Worse Comps
[E15.Worse_Comps]
9 Travel More Difficult Now
[E15.Travel_More_Difficul]
10 Moved Farther Away
[E15.Moved_Farther_Away]
11 Friends not Available to Travel With
[E15.Friends_not_Availabl]
12 Work
[E15.Work]
13 Going Other Places
[E15.Going_Other_Places]
14 Other
[E15.Other1]

F1
6
4 F1. What is your current marital status?
[F1]

1	Single
2	Married
3	Other
4	Refused

F2
6
5 F2. What is the highest level of education that you completed?
[F2]

1	Some high school or less
2	Graduated High school
3	Some college
4	Graduated college
5	Postgraduate School
6	Postgraduate Degree
7	Technical/Vocational/Trade school
8	Refused

F3
6
6 F3. Do you have children under age 18 who live with you?
[F3]

1	Yes
2	No

F4
6
7 F4. Which of the following categories best describes your household's current annual income?
[F4]

1	Less than $20,000
2	$20,000 to $29,999
3	$30,000 to $39,999
4	$40,000 to $49,999

5	$50,000 to $59,999
6	$60,000 to $69,999
7	$70,000 to $79,999
8	$80,000 to $89,999
9	$90,000 to $99,999
10	$100,000 to $149,999
11	$150,000 or more
12	Not Sure/Refused

F5
6
8 F.5. Which of the following choices best describes your current employment status? Are you . . .?
[F5]

1	Employed Full-time
2	Employed part-time
3	Self Employed
4	Semi-retired
5	Retired
6	A student
7	Unemployed
8	A Homemaker
9	Refused

F5A
6
9 F5A. What is your occupation?
[F5A]

1	Professional / Technical
2	Manager / Proprietor
3	Sales / Clerical
4	Tradesman / Craft Worker
5	Service Worker
6	Other

F6
7 F6. [INTERVIEWER OBSERVE ETHNICITY. IF UNSURE, SHOW CARD F AND ASK:] Most people
0 think
of themselves as belonging to a particular ethnic or racial group. Please tell me which one or two groups
you most closely identify with.
[F6]

1	White or Caucasian
2	African American or Black
3	Asian or Asian American
4	Hispanic or Latino
5	Native American or American Indian
7	Other

F7
7
1 F7. In what year were you born?
[F7]
Answer:

F8
7
2 F8. What is your home ZIP Code [USA] or Country [International]?
[F8]
Answer:
F9
7
3 F9. INTERVIEWER RECORD GENDER
[F9]

1	Male
2	Female

F10
7
4 F10. Can you tell me what the Atlantic City Slogan is?

(Always turned on.)
[F10]

1	Yes
2	No

G1
7
5 G1. Thank you. Those are all the questions. To verify that I have completed the interview please tell me your first name and telephone number.

(This is strictly for verification purposes to prove that I am not just making this up.)

HAND RESPONDENT INTERVIEW LOG SHEET. GIVE RESPONDENT GIFT.
G1A
7
6 First Name:____
[G1A]
G1B
7
7 Phone:__________________________
[G1B]
Answer:
G1C
7
8 G1C. Would you like to save this survey and start a new one?
[G1C]

1	Yes
2	No

G2
7 G2. Thank you. For this survey we are only interviewing adults who do not live or work in the Atlantic
9 City.