

**glsresearch**

Research that works.

116 New Montgomery Street  
Suite 600  
San Francisco, CA 94105  
Telephone: (415) 974-6620  
Facsimile: (415) 947-0260  
[www.glsresearch.com](http://www.glsresearch.com)

San Francisco  
Las Vegas

# **LAS VEGAS CONVENTION & VISITORS AUTHORITY**

***2006 Clark County  
Residents Study***

# ACKNOWLEDGMENTS

The Las Vegas Convention and Visitors Authority and GLS Research extend thanks to the Las Vegas community for their cooperation on this research project.

**CLARK COUNTY RESIDENTS STUDY**  
**LAS VEGAS CONVENTION AND VISITORS AUTHORITY**

**EXECUTIVE STAFF**

**President/CEO — Rossi T. Ralenkotter**  
**Senior Vice President of Operations — E. James Gans**  
**Senior Vice President of Marketing — Terry M. Jicinsky**  
**Vice President of Public Affairs – Vincent Alberta**  
**Vice President of Human Resources — Mark D. Olson**  
**Vice President of Sales — Nancy Murphy**  
**Vice President of Convention Center Sales – Chris Meyer**  
**Vice President of Finance – Brenda Siddall**  
**Vice President of Facilities – Mark Haley**  
**Legal Counsel — Luke Puschnig**  
**Sr. Director, Office of the President – Cathy Tull**

**MARKETING RESEARCH STAFF**

**Director of Internet Marketing and Research — Kevin M. Bagger**  
**Research Analyst — Gina Zozaya**

**LAS VEGAS CONVENTION AND VISITORS AUTHORITY**  
**BOARD OF DIRECTORS**  
**DECEMBER 2006**

**MAYOR OSCAR GOODMAN — Chair**  
**MR. KEITH SMITH — Vice-Chair**  
**MAYOR JAMES GIBSON — Secretary-Treasurer**

<b>MR. CHARLES BOWLING</b>	<b>MS. KARA KELLEY</b>
<b>COUNCILMAN LARRY BROWN</b>	<b>MAYOR MICHAEL MONTANDON</b>
<b>MR. GLENN CHRISTENSON</b>	<b>MAYOR BILL NICHOLS</b>
<b>COMMISSIONER TOM COLLINS</b>	<b>COUNCILMAN MIKE PACINI</b>
<b>COMMISSIONER YVONNE ATKINSON GATES</b>	<b>MR. ANDREW PASCAL</b>
<b>MR. TOM JENKIN</b>	

3150 Paradise Road  
Las Vegas, NV 89109-9096  
(702) 892-0711  
VisitLasVegas.com  
LVCVA.com  
VisitLaughlin.com  
VisitMesquite.com

# TABLE OF CONTENTS

	<u>Page</u>
RESEARCH OVERVIEW	
INTRODUCTION.....	1
METHODOLOGY.....	2
RESEARCH HIGHLIGHTS	
Gaming In General .....	4
Gaming In Casinos .....	6
Gaming Outside Casinos .....	7
Restaurants .....	7
Entertainment .....	8
Local Air And Ground Transportation Use .....	9
Fremont Street Experience Visitation.....	9
Visitation To Other Clark County Destinations.....	10
Sporting Events Attended .....	12
RESEARCH FINDINGS	
OVERVIEW OF LEISURE ACTIVITIES .....	13
SPORTING EVENTS ATTENDED .....	15
GAMBLING	
Gambling In General.....	17
Casino Gambling .....	29
Gambling Outside Casinos	
Convenience Stores, Grocery Stores, Gas Stations.....	36
Local Bars Or Restaurants .....	37
Outside The Greater Las Vegas Area .....	38
Estimated Gaming Budgets .....	40
Estimated Casino Gambling Market Share .....	43
RESTAURANTS .....	46
ENTERTAINMENT.....	50
USE OF AIR AND GROUND TRANSPORTATION.....	55
FREMONT STREET EXPERIENCE VISITATION.....	58
OTHER CLARK COUNTY TRAVEL DESTINATIONS .....	61
APPENDIX	
Questionnaire With Aggregate Results	

## TABLE OF FIGURES AND TABLES

	<u>Page</u>
TABLE 1: Leisure Activities .....	14
FIGURE 1: Sporting Events Attended In Past 12 Months .....	15
FIGURE 2: Gambling Behavior And Frequency .....	17
TABLE 2: Primary Reason Residents Do Not Gamble.....	18
FIGURE 3: Average Gambling Budget.....	19
FIGURE 4: Games Played Most Often.....	20
FIGURE 5: Machine Denomination Played Most Often.....	21
FIGURE 6: Number Of Coins Or Credits Bet Per Play.....	22
FIGURE 7: Play Progressive Machines.....	23
FIGURE 8: Table Minimum Played Most Often.....	24
FIGURE 9: Average Bet.....	25
FIGURE 10: Where Residents Gamble Most Often .....	26
TABLE 3: Reasons Residents Do Not Go To The Strip Corridor To Gamble .....	27
TABLE 4: Reasons Residents Do Not Go Downtown To Gamble.....	27
FIGURE 11: When Residents Gamble .....	28
FIGURE 12: Gambling In A Casino .....	29
FIGURE 13: Where Residents Gambled Most Often .....	31
FIGURE 14: Type Of Casino Gambled In Most Often .....	32
FIGURE 15: Self-Description Of Betting Habits .....	33
FIGURE 16: Percentage Of Residents Who Maintain Casino Credit .....	34
FIGURE 17: Percentage Of Residents Who Are Members Of A Casino Slot Club Or Players' Club .....	35
FIGURE 18: Gambling In Convenience Stores, Grocery Stores, Or Gas Stations.....	36
FIGURE 19: Gambling In Bars Or Restaurants.....	37
FIGURE 20: Gambling Outside Las Vegas .....	38
FIGURE 21: Where Residents Gamble Outside Las Vegas.....	39
FIGURE 22: Market Share .....	44
FIGURE 23: Number of Dinners Eaten Out Every Month.....	46

## TABLE OF FIGURES AND TABLES (Continued/2)

	<u>Page</u>
FIGURE 24: Proportion of Dinners Eaten in Hotel/Motel Restaurants .....	47
FIGURE 25: Where Residents Eat When Gambling In A Casino .....	48
FIGURE 26: Type Of Restaurant Usually Patronized .....	49
FIGURE 27: Attendance At Hotel Casino Shows .....	50
FIGURE 28: Gambling And Show Attendance .....	51
FIGURE 29: Type Of Hotel Casino Shows Attended .....	52
FIGURE 30: Other Leisure Activities Engaged In At Casino Hotels .....	53
FIGURE 31: Location of Hotel-Casino Residents Visit Most Often For Leisure Or Entertainment Other Than Gambling .....	54
FIGURE 32: Flights From McCarran Airport .....	55
FIGURE 33: Past Year Bus Usage And Satisfaction .....	56
FIGURE 34: Past Year Monorail Usage And Satisfaction .....	57
FIGURE 35: Percentage Of Residents Who Have Been To The Fremont Street Experience .....	58
FIGURE 36: Number Of Times Visited The Fremont Street Experience During The Past Year .....	59
FIGURE 37: Percentage Of Residents Who Have Taken A Non-Business Trip To Mesquite During The Past Year .....	61
FIGURE 38: Number Of Times Visited Mesquite During The Past Year .....	62
FIGURE 39: Primary Purpose Of Most Recent Trip To Mesquite .....	63
FIGURE 40: Number Of Nights Stayed In Mesquite On Most Recent Trip .....	64
FIGURE 41: Percentage Of Residents Who Have Taken A Non-Business Trip To Laughlin During The Past Year .....	65
FIGURE 42: Number Of Times Visited Laughlin During The Past Year .....	66
FIGURE 43: Primary Purpose Of Most Recent Trip To Laughlin .....	67
FIGURE 44: Number Of Nights Stayed In Laughlin On Most Recent Trip .....	68
FIGURE 45: Percentage Of Residents Who Have Taken A Non-Business Trip To Jean During The Past Year .....	69
FIGURE 46: Number Of Times Visited Jean During The Past Year .....	70
FIGURE 47: Primary Purpose Of Most Recent Trip To Jean .....	71

## TABLE OF FIGURES AND TABLES

(Continued/3)

	<u>Page</u>
FIGURE 48: Number Of Nights Stayed In Jean On Most Recent Trip .....	72
FIGURE 49: Percentage Of Residents Who Have Taken A Non-Business Trip To Primm During The Past Year.....	73
FIGURE 50: Number Of Times Visited Primm During The Past Year .....	74
FIGURE 51: Primary Purpose Of Most Recent Trip To Primm.....	75
FIGURE 52: Number Of Nights Stayed In Primm On Most Recent Trip.....	76
FIGURE 53: Percentage Of Residents Who Have Taken A Non-Business Trip To Boulder City During The Past Year.....	77
FIGURE 54: Number Of Times Visited Boulder City During The Past Year .....	78
FIGURE 55: Primary Purpose Of Most Recent Trip To Boulder City .....	79
FIGURE 56: Number Of Nights Stayed In Boulder City On Most Recent Trip....	80

# RESEARCH OVERVIEW

## INTRODUCTION

The Las Vegas Convention and Visitors Authority (LVCVA) conducts ongoing surveys to determine the opinions, attitudes, and behavior of all Americans — visitors and non-visitors alike — toward Las Vegas. While the data from those studies have yielded valuable national and regional information, they produce almost no information concerning attitudes and behavior of local (Clark County) residents.

Consequently, the LVCVA has commissioned GLS Research to conduct a biennial survey of Clark County residents to investigate the following topics:

- What Clark County residents do with their leisure time and the importance of gambling in relation to other leisure activities.
- The opinions and behavior of Clark County residents in relation to gambling, casino entertainment, and local restaurants.
- Leisure activities of Clark County residents outside of casinos.
- Other Clark County travel destinations outside of Las Vegas.

In the past, data was collected within a fiscal year, from July through June, and all of the eight prior reports displayed fiscal year data: 1989-90, 1991-92, 1993-94, 1995-96, 1997-98, 1999-2000, 2001-02, and 2003-04. Based on the collective feedback of the LVCVA's resort partners and other key audiences, beginning with the 2006 residents study the data is presented following a calendar year timeframe. A detailed analysis of the findings of the 2006 study of Clark County residents is presented after a brief discussion of the study methodology.

## METHODOLOGY

GLS Research conducted telephone interviews with 1,200 respondents selected at random from a random-digit-dial sample of Clark County, Nevada households. To account for any seasonal differences in response patterns, interviewing was conducted in four studies of 300 interviews each in February, May, August, and November 2006.

The questionnaire used for the 2006 Clark County Residents Study was similar in scope and content to the 2003-2004 questionnaire. However, there were some differences in the questions contained in the two versions of the survey. Specifically, questions were added asking respondents about their attendance at a Las Vegas Wranglers hockey game in the past 12 months; visitation to Boulder City in the past 12 months; attendance at comedy/improv shows and Broadway style shows at Las Vegas area casinos; and use of the Las Vegas Monorail in the past 12 months. Also, Henderson and Lake Las Vegas were added to the list of locations read to respondents asking where they do most of their gambling. Questions were removed asking respondents about the purchase of out-of-state lottery tickets, and about use of taxis in the greater Las Vegas area in the past 12 months.

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

The margin of error for the 1,200 respondent sample is  $\pm 2.8\%$  at the 95% level of confidence. That is, if this survey were to be repeated exactly as it was originally conducted, then 95 times out of 100, the responses from the sample (expressed as proportions) would be within 2.8% of the original results.

The data analysis consisted of developing statistical profiles of the attitudes, opinions, and perceptions of respondents and identifying statistically significant subgroup differences in response patterns among respondents.

Throughout this report, pie and bar charts are used to illustrate the data. The data presented in these charts are based on the total sample of 1,200 respondents for 2006 unless otherwise specified. In charts using proportions, those proportions may not add to 100% because of rounding or because multiple responses were permitted.

When we note that a difference between subgroups on a particular measure is “significant” or “statistically significant,” we mean that there is a 95% or better

chance that the difference is the result of true differences between the subgroup populations and is not due to sampling error alone. When we note that a difference between subgroups is “not significant” or “not statistically significant,” we mean that there is less than a 95% chance that the difference is the result of true differences between the subgroups.

This report presents the results of the 2006 study and highlights results which are significantly different from the 2003-2004 study.

Details on the findings and conclusions of the survey are presented in the following sections of this report.

## RESEARCH HIGHLIGHTS

The Las Vegas Convention and Visitors Authority (LVCVA) commissioned GLS Research to design a quantitative study for the purpose of investigating the leisure time activities of Clark County residents and their attitudes, opinions, and behavior with regard to gaming and other casino-related activities.

The study consisted of 1,200 interviews with Clark County residents who were randomly selected from a random-digit-dial sample of all Clark County households. The margin of error for the 1,200 respondents is  $\pm 2.8\%$  at the 95% level of confidence. Statistical analyses of the data were performed, and statistically significant subgroup differences in response patterns were identified.

Following are highlights of the findings of this study of Clark County residents:

### Gaming In General

- *Gambling continues to be highly ranked among leisure activities in which Clark County residents participate.* Gaming came in second (at 19%) among all activities in which residents said they participated. Only movies were mentioned by a larger percentage of residents. Gaming also was second among activities done "most often" (9%) and came in first among "favorite" activities (8%).
- Two-thirds (67%) of Clark County residents said they gamble at least occasionally.
- Of those who gamble, 46% do so at least once a week.
- More than six in ten gamblers (63%) who volunteered information budget \$25 or more per day for gaming — with 16% saying they budget \$25 to \$49 per day (down from 21% in 2003-04), and 47% saying they budget \$50 or more per day (up from 36%). Eight percent (8%) of gamers said they budgeted less than \$10 per day for gambling (down from 12%).
- Slot machines continue to be the most popular game played (37%), followed by video poker (29%, down significantly from 34% in 2003-04).

- Forty-six percent (46%) of those who play video poker or slot machines play the quarter machines most often, while 26% play the nickel machines most often (down from 34% in 2003-04). The *average* number of coins or credits bet per play was 9.8, up significantly from the average of 6.1 in 2003-04.
- Thirty-seven percent (37%) of slot and video machine players said they play “progressive” machines.
- Just over one-half (51%) of those who play table games most often said they usually played a minimum of \$5.00, while 27% said they play minimums of more than \$5.00, and 9% said they usually play a minimum of \$2.00 or \$3.00. Eight percent (8%) said they usually play a minimum of \$1.00 or less.
- Among those who play table games most often, 74% said their average bet was \$5.00 or more. The average (mean) bet was \$16.73.
- Among residents who gamble, 22% said they gamble most often on the Boulder Strip/Green Valley area (down significantly from 29% in 2003-04), while 19% said the Strip Corridor, 16% in the Summerlin area, 11% in North Las Vegas, 9% in Henderson, 4% Downtown, 1% at Lake Las Vegas (down from 2%), and 14% elsewhere (down from 19%).
- More than four in ten (44%) of respondents who do not usually gamble on the Strip Corridor said it was because of crowds, tourists, traffic, or difficulty finding parking (down from 52% in 2003-04). One-fifth (21%) said other places were closer or more convenient for them, and 9% said the odds of winning are stiffer or the gambling is worse on the Strip.
- Objections to gambling Downtown were different with the largest proportion (23%) mentioning inconvenience (although this is down from 33% in 2003-04). Two in ten (20%) cited crowds, tourists, too much traffic, or difficulty finding parking, while one in ten (10%) said they felt Downtown was a bad environment or cited safety concerns.

- Seventeen percent (17%) of residents who gamble said they do so only when they have out-of-town visitors, but the vast majority (76%) gamble at other times.

### Gaming In Casinos

- We asked residents who gamble if they ever gamble at casinos in the greater Las Vegas area (versus a local bar, a convenience store/grocery store, or a gas station). Seven in ten (71%) gamers said they do gamble at local area casinos. Seventy-two percent (72%) of gamers who gamble at local area casinos said they did so at least once a month, with 37% saying once a week or more and 35% saying once or twice a month.
- We asked residents for the location of the local area casino where they gamble most often. Twenty-five percent (25%) mentioned a casino on the Boulder Strip or in the Green Valley area, while 21% mentioned a location on the Strip, 17% mentioned a location in North Las Vegas, 13% mentioned a casino in the Summerlin area, 10% mentioned a casino in Henderson (down significantly from 15% in 2003-04), 2% mentioned a casino located Downtown, and 6% mentioned casinos in other locations.
- The vast majority of casino gamers (85%) said they gamble most often in a hotel casino.
- Seven in ten (70%) casino gamers considered themselves to be either very light or light bettors. Twenty-three percent (23%) considered themselves to be moderate bettors and only 5% considered themselves to be heavy or somewhat heavy bettors.
- Twenty-eight percent (28%) of residents who gamble in casinos maintain casino credit.
- Nearly three-quarters (73%) of residents who gamble say they are a member of a casino slot club or players' club, up significantly from 64% in 2003-04.

### Gaming Outside Casinos

- One-fifth (21%) of Clark County residents who gamble said they gambled at least occasionally in convenience stores, grocery stores, or gas stations (down significantly from 26% in 2003-04). Among those who do, 32% said they gamble at these locations once a week or more, and 40% said they do so once or twice a month. One-quarter (26%) gamble at these locations less than once a month.
- One quarter (25%) of residents who gamble said they gambled in local bars or restaurants at least occasionally. Among those who do, 28% said they do so once a week or more, 34% said once or twice a month, and 37% said less than once per month.
- Nearly one-quarter (23%) of Clark County gamers said they have gambled outside the greater Las Vegas area, up significantly from one-fifth (19%) in 2003-04. Two-thirds (67%) of those who gamble outside of the greater Las Vegas area said they do so less than once a month, 14% said they gambled outside Las Vegas once or twice a month (down from 23% in 2003-04), and 17% said they did so once a week or more (up from 11%). When asked where they gamble outside Las Vegas, the most frequent responses were Mesquite (32%) and Laughlin (25%).

### Restaurants

- Clark County residents average 7.1 dinners eaten out during a typical month, down significantly from an average of 7.6 in 2003-04. An average of 25.1% of these dinners are eaten in hotel or motel restaurants.
- Seventy-two percent (72%) of residents who gamble in local area casinos usually eat in a casino restaurant when they gamble.
- Residents who eat out when they gamble at local area casinos are most likely to dine at a hotel/motel/casino buffet (40%). Twenty-five percent (25%) said they eat at a coffee shop at a hotel/casino, while 24% said they eat at a gourmet restaurant, 5% eat at a fast food restaurant, and 3% eat at a coffee shop outside of a casino.

## Entertainment

- More than six in ten (63%) Clark County residents said they have been to a hotel casino show.
- Among residents who attend hotel casino shows, 27% go to a show twice a year, another 27% go four times a year, 22% go once a month or more, and 23% go once a year or less.
- Seven in ten (71%) residents who have been to shows have been to a headliner show, while 69% have been to a large-scale Las Vegas style show, 52% have been to a comedy or improv show, 50% to a small scale revue (down from 58% in 2003-04), 49% to a lounge act (down from 54%), and 46% to a Broadway style show.
- In the past year, two-thirds (65%) of Clark County residents said they watched a movie at a casino-hotel, while just under one-half (49%) said they went shopping, four in ten (40%) said they had gone to a bar (down from 44% in 2003-04), three in ten (30%) went bowling, and one-quarter (26%) visited a nightclub. Smaller numbers said they went to a barber or hair salon (14%), visited a spa (13%), or attended a slot or other type of gaming tournament (8%).
- We asked residents for the location of the casino they go to most often for leisure or entertainment other than gambling. Thirty-three percent (33%) mentioned a casino on the Strip Corridor, 17% mentioned a location on the Boulder Strip or in the Green Valley area, 12% said North Las Vegas, 10% Summerlin, 6% Henderson, 2% mentioned Downtown, and 4% mentioned other locations. Eleven percent (11%) said they do not go to casinos at all for non-gaming entertainment (up from 3% in 2003-04).

### Local Air And Ground Transportation Use

- We asked Clark County residents how many flights they have made out of McCarran International Airport during the past 12 months. Thirty-five percent (35%) said they had not flown from McCarran at all during the past year, while 14% said they had flown once, 14% twice, 18% three to five times, and 17% more than five times. The *average* (mean) number of flights taken during the past 12 months was 3.9 per resident.
- Twelve percent (12%) of Clark County residents have used the public bus service to travel around the Las Vegas area during the past year. Of these respondents, 76% said they were satisfied with the service provided.
- Twelve percent (12%) of Clark County residents have used the Las Vegas Monorail to travel in the Las Vegas Strip area. Of these respondents, 83% said they were satisfied with the service provided.

### Fremont Street Experience Visitation

- More than eight in ten (85%) residents said they have been to the Fremont Street Experience in Downtown Las Vegas. Among those who have visited, 28% said they did not go to the Fremont Street Experience at all in the past 12 months, 25% had been only once, 15% had been twice, 19% three to five times, and 10% more than five times.
- Eighty-eight percent (88%) of residents who visited the Fremont Street Experience in the past year said they had seen the light show, 66% saw the street performers, 58% dined at a restaurant, 36% gambled, 32% purchased something at a retail location, 26% attended a special event, and 18% went to a lounge or showroom to see some type of entertainment.

### Visitation To Other Clark County Destinations

- Nineteen percent (19%) of residents said they had visited Mesquite within the past year for purposes other than work or personal business. Among these respondents, the average number of visits to Mesquite in the past year was 3.0.

Six in ten (60%) of those who visited Mesquite in the past year said it was for vacation or pleasure. Eight percent (8%) said they were visiting friends or relatives, another 8% said they came to play golf, 7% said they were attending a special event, 6% said they were just passing through, 5% said they came primarily to gamble, 4% came to visit a spa, and 1% said they were attending a casino tournament.

The average number of nights stayed in Mesquite in the past year was 1.5 for all visitors, and 2.1 excluding those on daytrips.

- Thirteen percent (13%) of residents said they had visited Laughlin within the past year for purposes other than work or personal business, down significantly from 19% in 2003-04. Among these respondents, the average number of visits to Laughlin in the past year was 2.2.

More than one-half (54%) of those who visited Laughlin in the past year said the primary purpose of their most recent trip was vacation or pleasure. Twelve percent (12%) said they were visiting Laughlin primarily to gamble, another 12% said they were visiting friends or relatives, 8% said they were attending a special event, another 8% said they were visiting for water-based recreation, and 4% said they were just passing through.

The average number of nights stayed in Laughlin in the past year was 2.0 for all visitors (up significantly from 1.6 nights in 2003-04), and 2.4 excluding those on daytrips.

- Four percent (4%) of residents said they had visited Jean within the past year for purposes other than work or personal business, down significantly from 8% in 2003-04. Among these respondents, the average number of visits to Jean in the past year was 3.5.

Forty percent (40%) of residents who traveled to Jean in the past year said it was for vacation or pleasure, while 31% said they were just passing through (up significantly from 15% in 2003-04). Relatively smaller numbers of respondents said they were visiting Jean for a special event (10%), to gamble (8%), or to visit friends or relatives (4%).

Nearly three-quarters (73%) of those who visited Jean in the past year were visiting only for the day and did not spend any nights in Jean. Including these daytrippers, the average number of nights stayed in Jean in the past year was 0.4. Looking only at those who stayed overnight (i.e., excluding daytrippers), the average number of nights stayed was 1.9.

- Ten percent (10%) of residents said they had visited Primm within the past year for purposes other than work or personal business, down from 17% in 2003-04. Among these respondents, the average number of visits to Primm in the past year was 3.3.

Thirty-one percent (31%) of residents who visited Primm in the past year said they visited Primm primarily to shop there, while 26% said they visited for vacation or pleasure (down from 38%). One in six (17%) said they visited Primm primarily to gamble, while 10% said they were attending a special event, 9% were just passing through, and 4% said they were visiting friends or relatives.

Nearly seven in ten (69%) of those who visited Primm in the past year were visiting only for the day and did not spend any nights in Primm. Including these daytrippers, the average number of nights stayed in Primm in the past year was 0.5. Looking only at those who stayed overnight (i.e., excluding daytrippers), the average number of nights stayed was 1.6.

- Eighteen percent (18%) of residents said they had visited Boulder City within the past year for purposes other than work or personal business. Among these respondents, the average number of visits to Boulder City in the past year was 5.3.

Forty-three percent (43%) of those who visited Boulder City in the past year said it was for vacation or pleasure, while 19% said they were attending a special event, 18% were visiting friends or relatives, 10% were just passing through, and 7% were visiting primarily to shop.

More than eight in ten (85%) of those who visited Boulder City in the past year were visiting only for the day and did not spend any nights in Boulder City. Including these daytrippers, the average number of nights stayed in Boulder City in the past year was 0.3. Looking only at those who stayed overnight (i.e., excluding daytrippers), the average number of nights stayed was 2.3.

### Sporting Events Attended

- Residents were asked which of several sporting events they had attended in the past 12 months. Twenty-four percent (24%) of residents said they had attended a special sporting event (such as a title boxing match, the National Finals Rodeo, a professional golf tournament, or the Las Vegas Bowl football game), while 16% attended an auto race at the Las Vegas Motor Speedway, 14% attended a Las Vegas 51's baseball game, 12% attended a University of Nevada, Las Vegas (UNLV) football game, 10% attended a UNLV basketball game, another 10% attended a Las Vegas Wranglers hockey game, and 7% attended some other UNLV sporting event.

## RESEARCH FINDINGS

### OVERVIEW OF LEISURE ACTIVITIES

We asked residents to tell us in their own words what activities they took part in during their leisure time over the course of a year. (Residents were instructed to volunteer only activities outside the home, which could be done in or around Las Vegas.) Residents were then asked which of the activities they mentioned was the one they did most often and which one was their favorite (Table 1).

Gambling ranked high on all measures, coming in second (at 19%) among all activities mentioned. Gambling also came in second among activities done the most often (9%), and came in first among favorite activities (8%).

Significantly higher proportions of residents in the following subgroups volunteered gambling as an activity in which they participated:

- Respondents aged 60 and older (27%) compared to respondents under 60 years old (16%).
- Those who are retired (26%) compared to those who are employed (17%).
- Respondents with no children living at home (24%) compared to those with children (9%).
- Respondents who have been residents of Las Vegas for 36 years or less (22%) compared to those who have been residents longer (7%).

TABLE 1  
Leisure Activities Of Clark County Residents

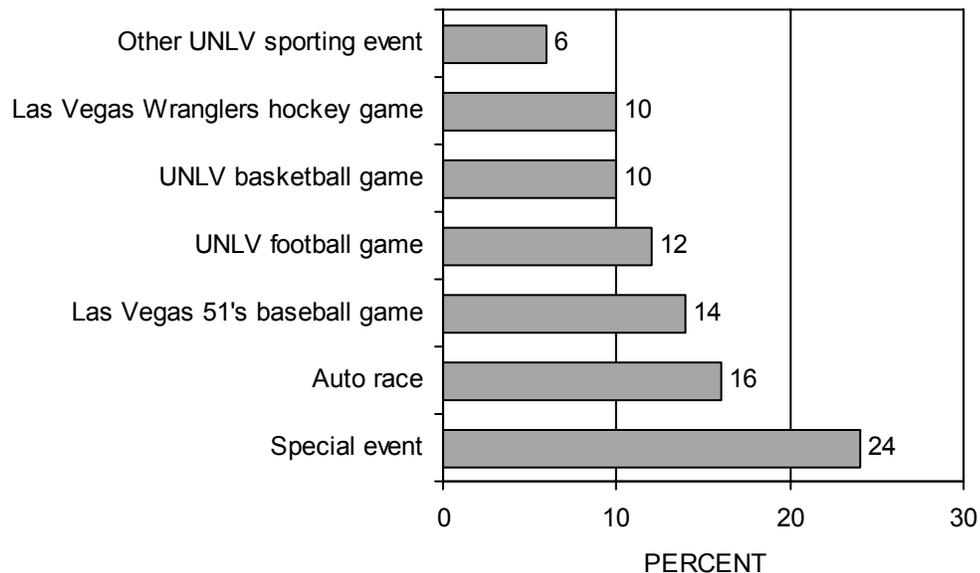
What activities do you take part in during your leisure time?	Activities (volunteered responses)*	Activity done most often**	Favorite activity**
Movies	20%	6%	7%
<b>Gambling</b>	<b>19</b>	<b>9</b>	<b>8</b>
Eating out	18	10	7
Hiking	16	7	7
Shows	16	3	4
Shopping	10	4	4
Golf	10	6	6
Sightseeing	9	3	4
Swimming	8	3	2
Camping	8	3	4
Bowling	6	2	2
Working out	6	4	3
Sporting events	6	2	3
Visiting friends or relatives	6	2	3
Fishing	6	2	3
Community activities	6	4	4
Boating	5	1	2
Cycling	5	2	2
Picnics	4	2	2
Nightclubbing	4	2	2
Baseball	3	1	1
Basketball	2	1	1
Snow skiing	2	0	1
Bingo	2	1	1
Tennis	2	1	1
Hunting	2	0	0
Football	2	1	1
Horseback riding	1	1	1
Water skiing	1	0	0
Sunbathing	1	0	0
Other	1	6	5
Not sure/No answer	9	13	13

\* Residents volunteered up to five activities.

\*\* Only one response was allowed; percentages do not add to 100 because of rounding.

**SPORTING EVENTS ATTENDED**

FIGURE 1  
Sporting Events Attended In Past 12 Months



We asked residents which of several sporting events they had attended in the past 12 months (Figure 1):

- A special sporting event held in Las Vegas such as a title boxing match, the National Finals Rodeo, a professional golf tournament, or the Las Vegas Bowl football game (24%).
- An auto race at the Las Vegas Motor Speedway (16%).
- A Las Vegas 51's baseball game (14%).
- A University of Nevada Las Vegas football game (12%).
- A University of Nevada Las Vegas basketball game (10%).
- A Las Vegas Wranglers hockey game (10%).
- Any other UNLV sporting event excluding football and basketball games (6%).

Men were significantly more likely than women to say they attended a Las Vegas 51's baseball game (16% vs. 12%), a UNLV football game (15% vs. 10%), and other non-UNLV special sporting events in Las Vegas (26% vs. 21%).

People with household incomes of \$50,000 or more were significantly more likely than those with lower household incomes to have attended most sporting events in the past 12 months, including Las Vegas 51's baseball games (19% vs. 9%), UNLV football games (16% vs. 9%), UNLV basketball games (15% vs. 6%), Las Vegas Wranglers hockey games (13% vs. 7%), and other non-UNLV special sporting events in Las Vegas (30% vs. 17%).

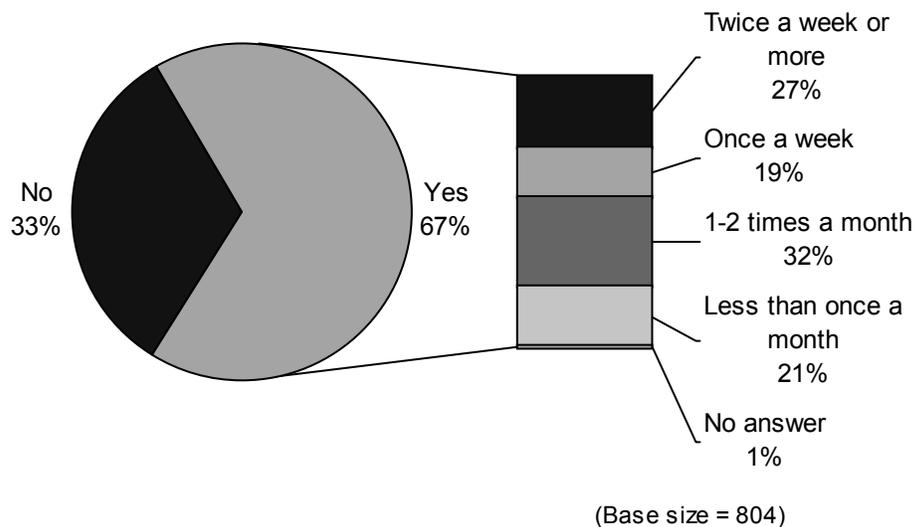
Those who gamble were significantly more likely than those who do not gamble to say that they attended an auto race at the Las Vegas Motor Speedway (18% vs. 13%), a Las Vegas Wranglers hockey game (11% vs. 8%), or some other non-UNLV special sporting event in Las Vegas (27% vs. 18%).

**GAMBLING**

**Gambling In General**

Two-thirds (67%) of Clark County residents said they gamble at least occasionally, while one-third (33%) said they do not gamble at all (Figure 2).

**FIGURE 2**  
Percentage Of Residents Who Gamble At Least Occasionally And How Often They Gamble



We asked residents who gamble at least occasionally how often they gamble (Figure 2). Twenty-seven percent (27%) said they do so twice a week or more, 19% gamble once a week (up from 14% in 2003-04), 32% gamble once or twice a month (down from 37% in 2003-04), 21% gamble less than once a month, and 1% gave no answer.

Among those who gamble, retired people were significantly more likely to do so than those who are employed (74% vs. 67%). Retired people were also significantly more likely than employed people (37% vs. 23%) to say they gamble twice a week or more often, while people 60 and older were twice as likely as those under 60 years old (40% vs. 19%) to gamble two or more times a week.

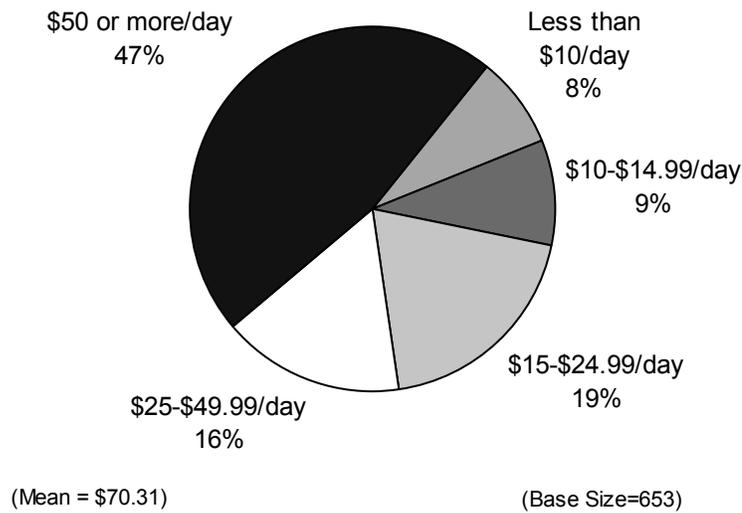
We asked residents who do not gamble why they do not (Table 2). Fifty-six percent (56%) of respondents mentioned financial reasons, 35% said they don't like gaming or are just not interested in it, 21% said the odds of winning were unfavorable (up from 14% in 2003-04), 17% cited religious/moral considerations, 7% said they do not like the casino atmosphere, and 6% said gaming was too addictive.

TABLE 2  
Reasons Residents Do Not Gamble\*  
(Among Those Who Do Not Gamble)

	TOTAL
Can't afford it/no money	56%
Don't like it/not interested	35
Never win/unfavorable odds	21
Religious reasons	17
Don't like casino atmosphere	7
Too addictive	6
Refused/no answer	1
BASE	(396)

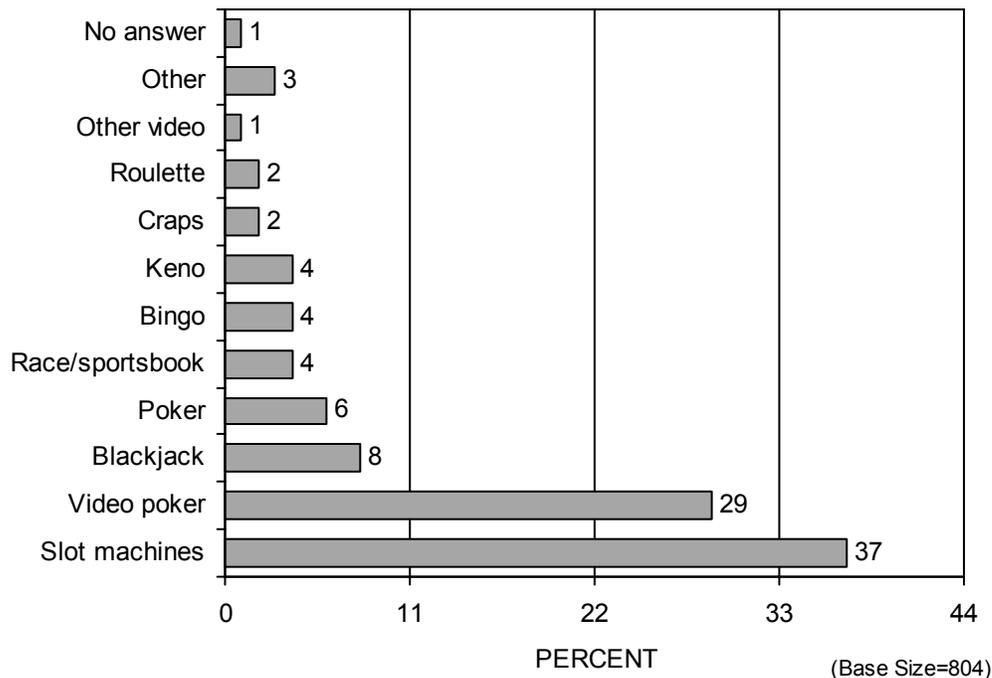
\* Up to two responses were allowed. Percentages represent the combined (first plus second) response.

**FIGURE 3**  
**Average Gambling Budget**  
 (Among Those Who Gamble And  
 Volunteered Budget Information)



We asked residents for an estimate of the average amount they budgeted for gambling per day over the course of a year (Figure 3). Among those who responded to the question, 8% said they budgeted less than \$10 per day for gambling (down from 12% in 2003-04), 9% said \$10 to \$14 per day, 19% said \$15 to \$24 per day, 16% said \$25 to \$49 per day (down from 21%), and 47% said \$50 or more per day (up from 36%). The average gaming budget was \$70.31 per day, a slight increase from the average of \$58.71 per day in 2003-04.

FIGURE 4  
Game Played Most Often  
(Among Those Who Gambled)

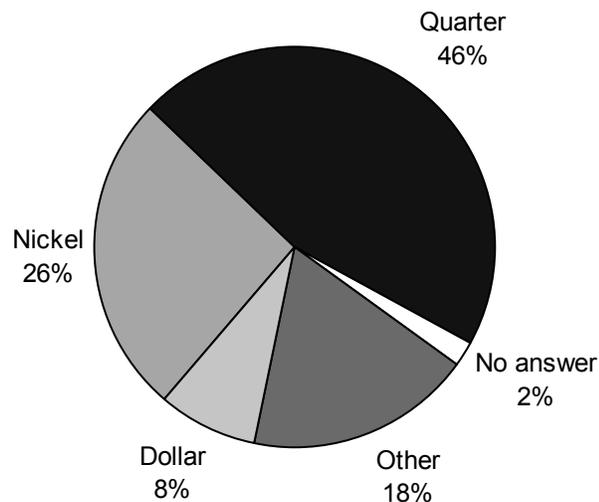


Residents who gamble at least occasionally were asked what game they played most often (Figure 4). Slot machines continue to be the most popular game played (37%), followed by video poker (29%, down significantly from 34% in 2003-04). Other games followed more distantly, including blackjack (8%), poker (6%), race/sportsbook (4%), bingo (4%), keno (4%), craps (2%), roulette (2%, up from 1%), and other video machines (1%).

There were several subgroup differences of note:

- Women were more likely than men to say they played slots (42% vs. 32%), video poker (32% vs. 25%), and bingo (6% vs. 2%), while men were more likely than women to say they played blackjack (12% vs. 4%), poker (7% vs. 4%), race/sportsbook (7% vs. 1%), and craps (3% vs. 1%).
- Residents 60 and older were more likely than younger residents to play slots the most often (44% vs. 34%), while residents under 30 years old were more likely than older residents to play blackjack most often (16% vs. 7%).

FIGURE 5  
Machine Denomination Played Most Often  
(Among Those Who Play Slot And  
Video Poker Machines Most Often)



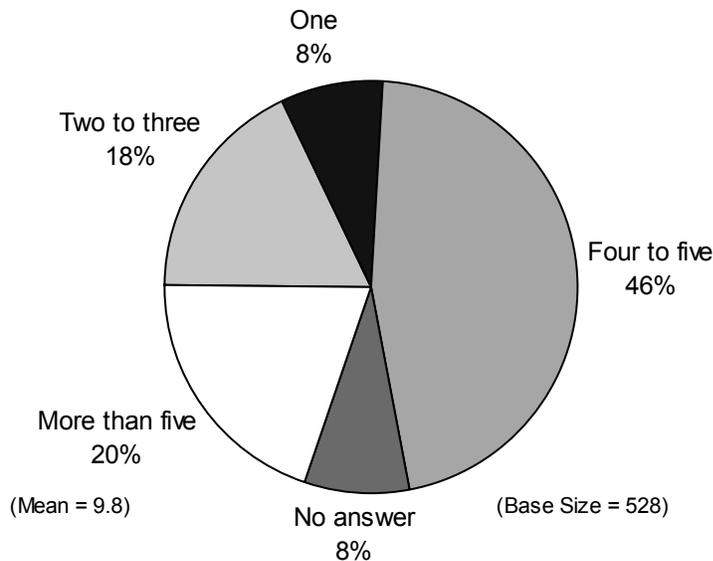
(Base Size = 528)

We asked residents who played video poker and slot machines most often which denomination machine they usually played (Figure 5). The greatest preference was for the quarter machines, with 46% saying they play that denomination the most often. Twenty-six percent (26%) play the nickel machines most often (down from 34% in 2003-04), while 26% preferred other denominations (up from 17%).

The following are the most noteworthy subgroup differences on this measure:

- Residents with incomes of \$30,000 or more were more likely than those with lower incomes to play the quarter machines (50% vs. 28%), while residents who earned less than \$30,000 were more likely to play the nickel machines than those who earned more (37% vs. 22%).
- Women were also more likely than men to play the nickel machines (29% vs. 21%), as were residents 60 and older compared to younger residents (35% vs. 21%).

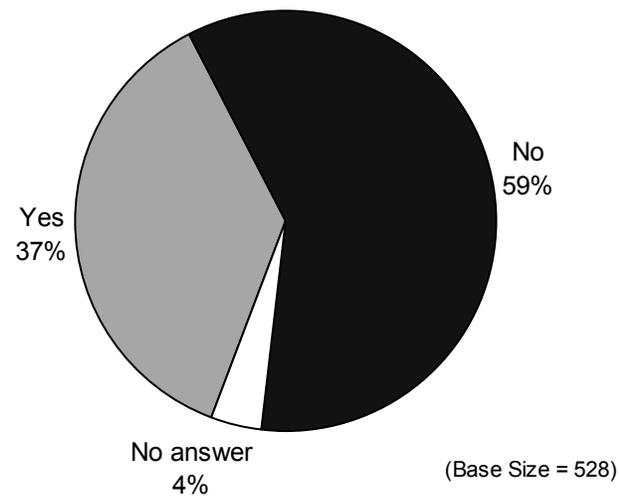
FIGURE 6  
Number Of Coins Or Credits Bet Per Play  
(Among Those Who Play Slot And  
Video Poker Machines Most Often)



Nearly one-half (46%) of machine players said they typically bet four to five coins or credits per play, while 20% said they bet more than five (up from 14% in 2003-04), 18% bet two or three (down from 25%), and 8% bet just one (Figure 6). The *average* number of coins or credits bet per play was 9.8, up significantly from the average of 6.1 in 2003-04.

Residents under 40 years old reported playing a significantly higher number of coins or credit per play (average of 13.5) than older residents (average of 8.9).

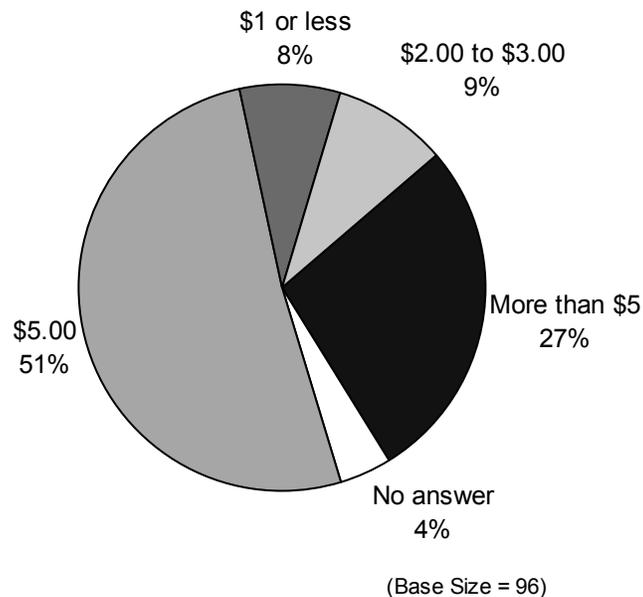
FIGURE 7  
Play Progressive Machines  
(Among Those Who Play Slot And  
Video Poker Machines Most Often)



We asked residents who play video or slot machines most often if they usually play the “progressive” machines, and 37% said they did (Figure 7).

Residents under 30 years old were far more likely than older residents to say they play the “progressive” machines (62% vs. 36%).

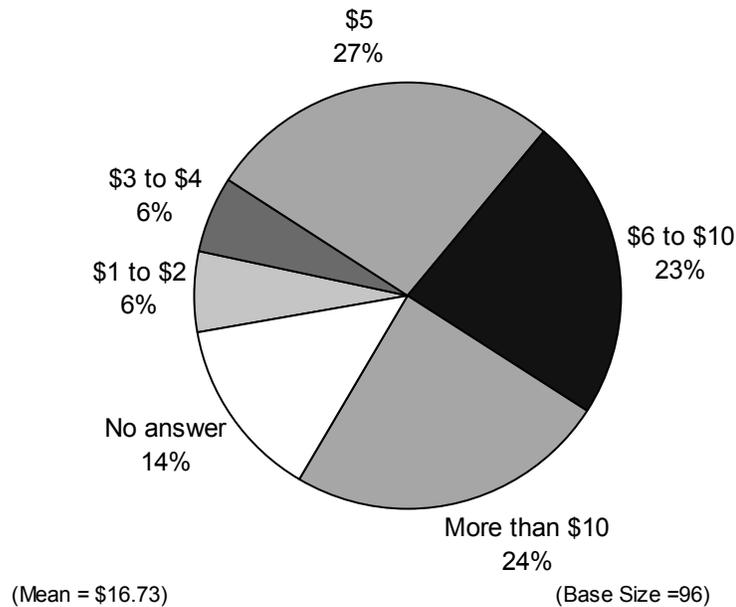
FIGURE 8  
Table Minimum Played Most Often  
(Among Those Who Play Table Games Most Often)



We asked residents who play table games<sup>1</sup> most often to tell us what table minimum they most often played (Figure 8). Just over one-half (51%) of table game players said they played a minimum of \$5.00, while 27% said more than \$5.00, 9% said \$2.00 or \$3.00, and 8% said \$1.00 or less.

<sup>1</sup> Table games are defined as blackjack, craps, roulette, baccarat, and Big 6.

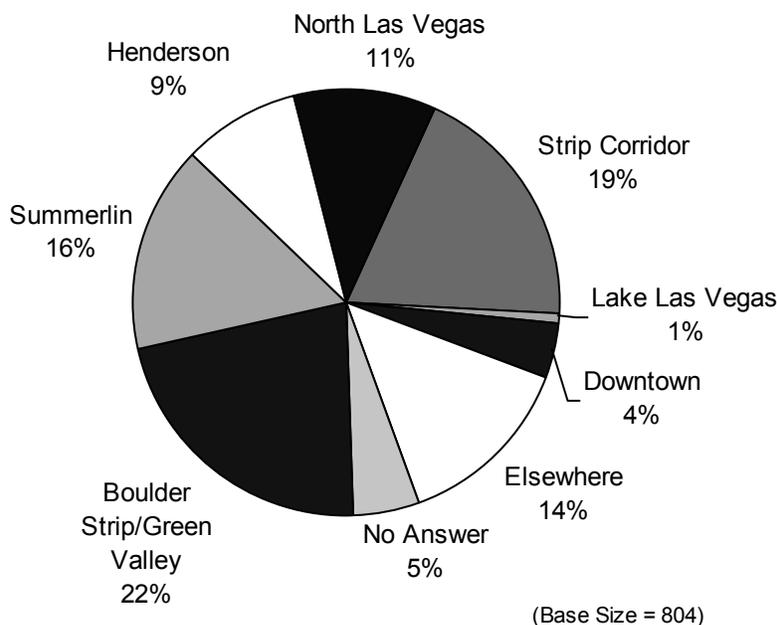
**FIGURE 9**  
**Average Bet**  
(Among Those Who Play Table Games Most Often)



We asked residents who play table games most often to tell us their average bet (Figure 9). Twenty-seven percent (27%) said it was \$5, while 24% said more than \$10, 23% said \$6 to \$10, and 12% said \$4 or less. Fourteen percent (14%) declined to give an answer. The *average* (mean) bet was \$16.73.

The average reported bet among men (\$20.79) was significantly higher than the average reported bet among women (\$7.85).

FIGURE 10  
Where Residents Gamble Most Often  
(Among Those Who Gamble)



All residents who gamble were asked where they gambled most often (Figure 10). Twenty-two percent (22%) of residents said they gamble on the Boulder Strip/Green Valley area most often (down significantly from 29% in 2003-04), while 19% said the Strip Corridor, 16% in the Summerlin area, 11% in North Las Vegas, 9% in Henderson, 4% Downtown, 1% at Lake Las Vegas (down from 2%), and 14% elsewhere (down from 19%).

Residents who did not say they gambled most often on the Strip Corridor or Downtown were asked why they did not gamble in those locations (Tables 3 and 4). Among those who do not gamble most often on the Strip Corridor, more than four in ten (44%) said it was because of crowds, tourists, traffic, or difficulty finding parking (down from 52% in 2003-04), while one-fifth (21%) said other places were closer or more convenient for them, 9% said the odds of winning are stiffer or the gambling is worse on the Strip, 6% said they prefer smaller or local gaming venues (up from 3%), and 5% said they just don't like the Strip.

Among those who do not gamble most often Downtown, 23% said that other places were closer or more convenient for them (down from 33%), 20% cited crowds, tourists, too much traffic, or difficulty finding parking, 10% said they felt

Downtown was a bad environment or cited safety concerns, 8% said they just don't like the Downtown area in general (down from 12%), and 6% said they preferred another area that had bigger or flashier gaming venues or better odds of winning.

TABLE 3

## Reasons Residents Do Not Go To The Strip To Gamble

(Among Those Who Do Not Gamble On The Strip Corridor)

	TOTAL
<u>Crowds/traffic</u>	<u>44%</u>
Too crowded/too many tourists	34
Too much traffic/no parking	10
Elsewhere closer/more convenient	21
Odds of winning stiffer/gambling worse	9
Prefer smaller/local gaming venues	6
Just don't like it	5
Other	9
Not sure/no answer	6
BASE	(653)

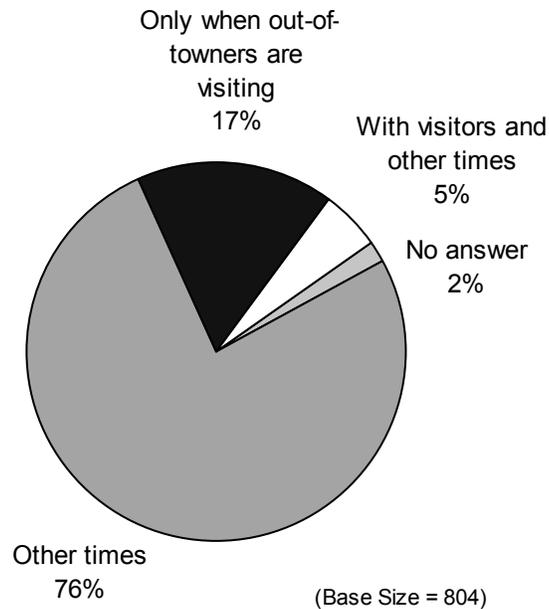
TABLE 4

## Reasons Residents Do Not Go Downtown To Gamble

(Among Those Who Do Not Gamble Downtown)

	TOTAL
Elsewhere closer/more convenient	23%
<u>Crowds/traffic/tourists</u>	<u>20</u>
Too crowded/too many tourists	12
Too much traffic/no parking	8
Not safe/high crime area/bad environment	10
Just don't like it	8
<u>Prefer another area</u>	<u>6</u>
Prefer bigger/flashier gaming venues	3
Odds of winning stiffer/gambling worse	3
Other	11
Not sure/no answer	22
BASE	(773)

FIGURE 11  
When Residents Gamble  
(Among Those Who Gamble)



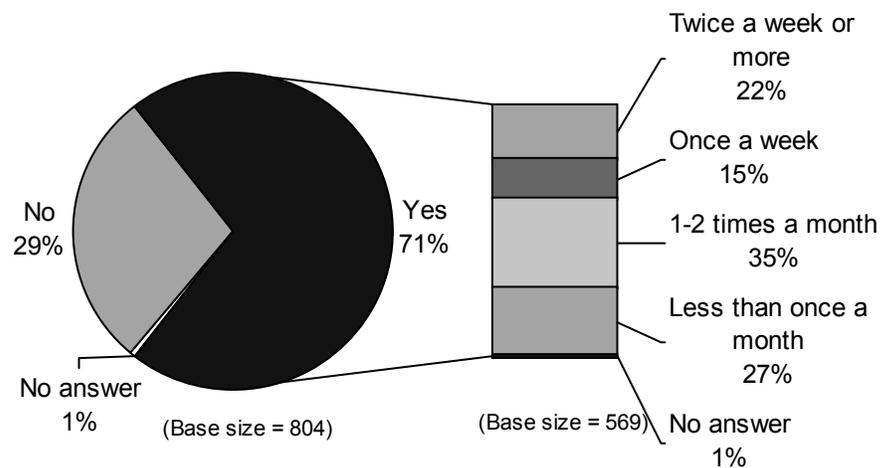
We asked residents who gamble if they gambled only when they had out-of-town visitors or if they gambled at other times (Figure 11). Seventeen percent (17%) of respondents said they gambled *only* when they had out-of-town visitors. However, 76% of residents who gamble said they gambled at other times, and an additional 5% gamble both when they have out-of-town guests *and* at other times.

Employed residents were significantly more likely than retired residents to say they gambled only when they had out-of-town visitors (20% vs. 12%).

**Casino Gambling**

We asked residents who gamble if they ever gamble in casinos in the greater Las Vegas area\* (Figure 12). Seven in ten (71%) gamers said they did gamble in a Las Vegas area casino (versus some other location such as a bar or retail store).

FIGURE 12  
Percentage Of Gamblers Who Gamble  
In Las Vegas Area Casinos And How Often They Do So  
(Among Those Who Gamble)



The likelihood of going to a Las Vegas area casino to gamble tends to increase with residents' average daily gaming budget, from less than one-half (46%) of those who budget \$10 or less per day for gaming to three-quarters (76%) of those who budget \$25 or more per day.

\* Respondents were told that the greater Las Vegas area includes the City of Las Vegas, its immediate suburbs, North Las Vegas, Boulder Highway, and Henderson but does *not* include outlying areas such as Jean, Mesquite, Searchlight, or Laughlin.

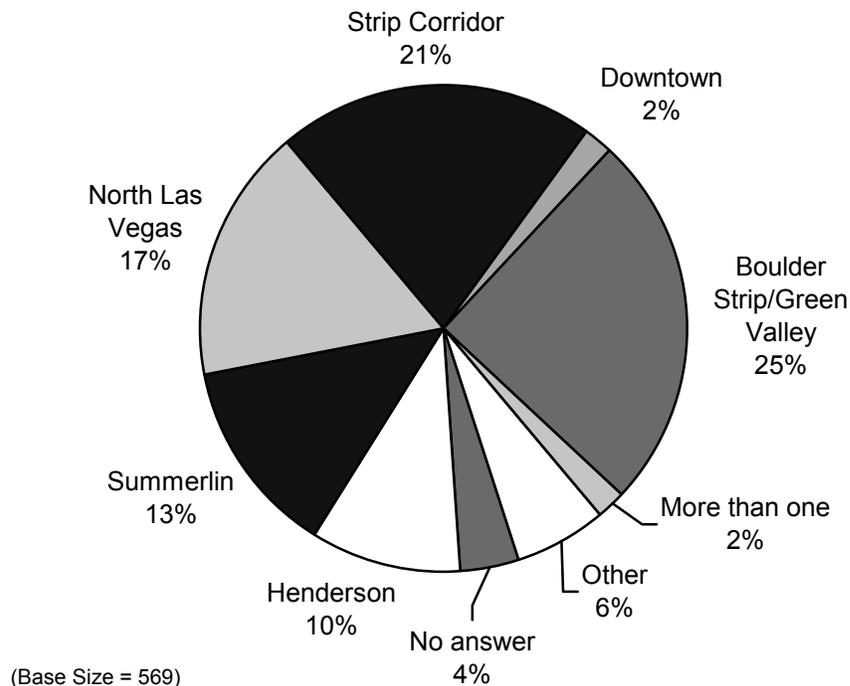
Residents who gamble in Las Vegas area casinos were asked how often they do so (see Figure 12). Twenty-two percent (22%) said twice a week or more, 15% said once a week, 35% said once or twice a month, 27% said less than once a month, and 1% gave no answer.

Significantly higher proportions of the following subgroups said they gamble in Las Vegas area casinos twice a week or more:

- Residents 60 and older (35%) compared to residents under 60 years old (15%).
- Residents who were retired (31%) compared to residents who were employed (18%).
- Residents with a high school education or less (29%) compared to college graduates or those with some college education (19%).
- Residents with no children living at home (27%) compared to those with children (7%).

If we compare Figure 2 (the frequency of gambling in any location) to Figure 12 (the frequency of gambling in Las Vegas area casinos), we see that a higher proportion of residents said they gamble once a week or more at all locations (46%) than said they gamble once a week or more at a casino in the greater Las Vegas area (37%).

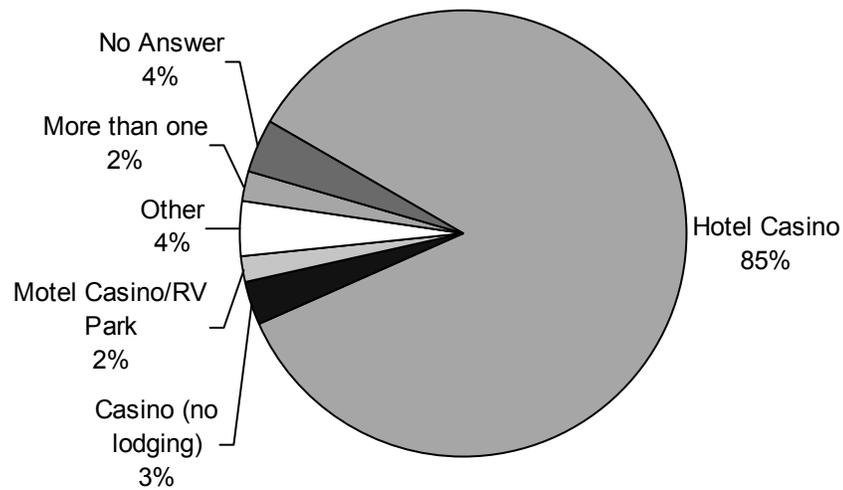
FIGURE 13  
Where Casino Gamblers Most Often Gamble  
(Among Those Who Gamble In Las Vegas Area Casinos)



We asked residents the location of the Las Vegas area casino where they gamble most often (Figure 13). Twenty-five percent (25%) mentioned a casino on the Boulder Strip or in the Green Valley area, while 21% mentioned a location on the Strip, 17% mentioned a location in North Las Vegas, 13% mentioned a casino in the Summerlin area, 10% mentioned a casino in Henderson (down significantly from 15% in 2003-04), 2% mentioned a casino located Downtown, and 6% mentioned casinos in other locations. Two percent (2%) said they couldn't name just a single casino they gamble at most often, while 4% gave no answer at all.

Residents under 40 years old were the most likely to gamble on the Strip the most often (30%), while residents who earn \$50,000 or more were twice as likely as those who earn less to say they gamble in Summerlin the most often (16% vs. 8%).

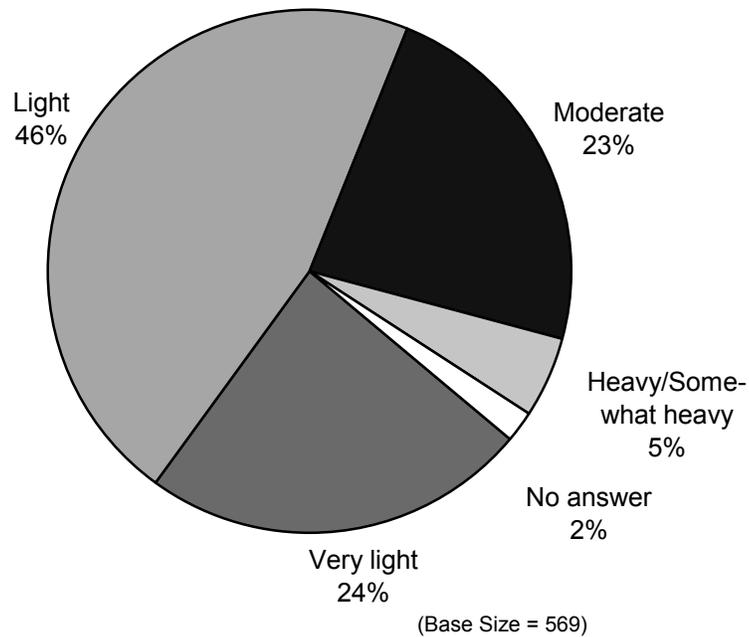
FIGURE 14  
Type Of Casino Gambled In Most Often  
(Among Those Who Gamble In Las Vegas Area Casinos)



(Base Size = 569)

We asked residents the type of Las Vegas area casino where they gamble most often (Figure 14). The vast majority — 85% — said a hotel casino. Three percent (3%) said they most often gambled at freestanding casinos that were not part of a hotel or motel, 2% mentioned either motel or RV park casinos, 4% named other types of casinos, 2% declined to name a single casino type, and 4% gave no answer.

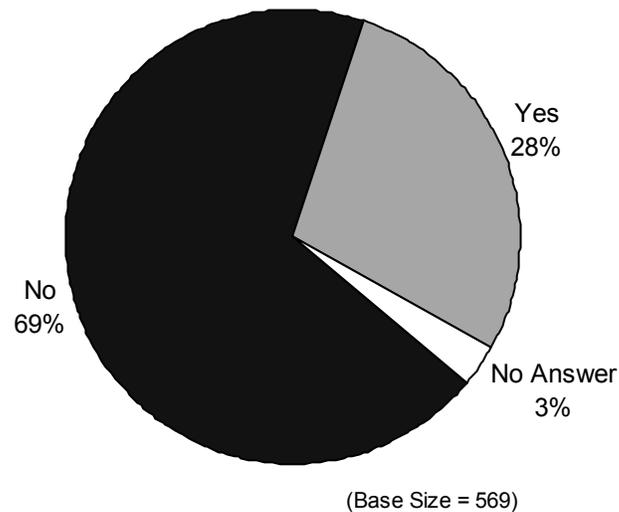
FIGURE 15  
Self-Description Of Betting Habits  
(Among Those Who Gamble In Las Vegas Area Casinos)



We asked residents who gamble in Las Vegas area casinos to tell us whether they considered themselves to be very light, light, moderate, somewhat heavy, or very heavy bettors (Figure 15). Seven in ten (70%) respondents consider themselves to be either light (46%) or very light (24%) bettors. Twenty-three percent (23%) of casino gamers consider themselves to be moderate bettors, and 5% said they are heavy or somewhat heavy bettors.

As might be expected, those with the smallest gaming budgets (less than \$15 a day) were the most likely to call themselves light or very light bettors (92%). Those with the largest gaming budgets (\$50 or more a day) were the most likely to characterize themselves as moderate bettors (34%).

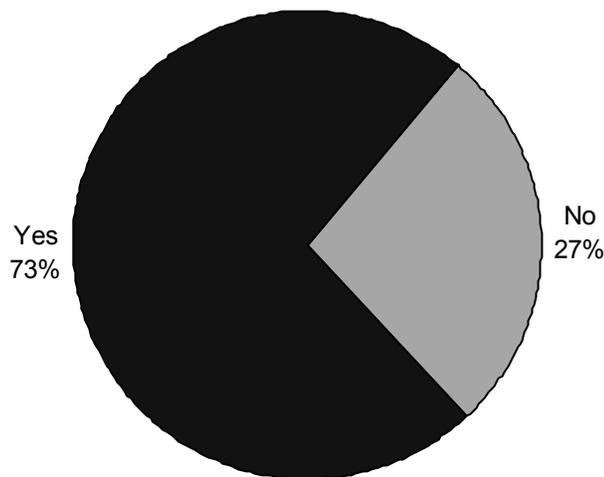
FIGURE 16  
Percentage Of Residents  
Who Maintain Casino Credit  
(Among Those Who Gamble In Las Vegas Area Casinos)



We asked residents who gamble in Las Vegas area casinos if they maintain casino credit and 28% said they did (Figure 16).

Women were significantly more likely than men to say they maintain casino credit (33% vs. 24%). Those with gaming budgets of \$25 a day or more were the most likely to say they maintain casino credit (29%), while those with gaming budgets of less than \$10 a day were the least likely (12%).

FIGURE 17  
Percentage Of Residents Who Are  
Members Of A Casino Slot Club Or Players' Club  
(Among Those Who Gamble In Las Vegas Area Casinos)



(Base Size = 569)

We asked residents if they were a member of a casino slot club or players' club and nearly three-quarters (73%) said they were (Figure 17), up significantly from 64% in 2003-04. The following subgroups were the most likely to say they were members of a casino slot club or players' club:

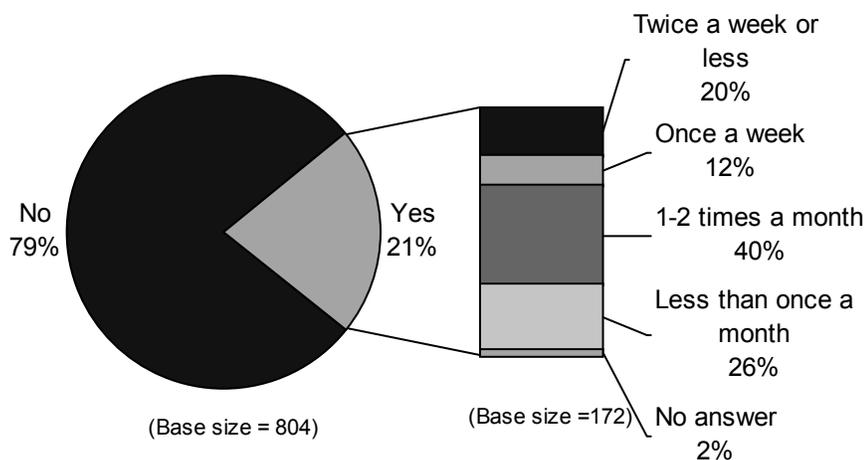
- Residents with a high school education or less or some college (80%) compared to college graduates or those with some college education (70%).
- Residents who were retired (82%) compared to those who were employed (69%).
- Residents 50 and older (80%) compared to those under 50 years old (64%).
- Respondents with average daily gaming budgets of \$15 or more (76%) compared to those with gaming budgets of under \$15 (56%).

**Gambling Outside Casinos**

**Convenience Stores, Grocery Stores, Gas Stations**

We asked all residents who gamble if they ever do so in convenience stores, grocery stores, or gas stations in the greater Las Vegas area (Figure 18). One-fifth (21%) said they have gambled in these locations, down significantly from one-quarter (26%) in 2003-04. Among those who do, 32% said they did so once a week or more, 40% said once or twice a month, 26% said less than once a month, and 2% gave no answer.

**FIGURE 18**  
Percentage Of Residents Who Gamble In Convenience Stores, Grocery Stores, Or Gas Stations And How Often They Do So

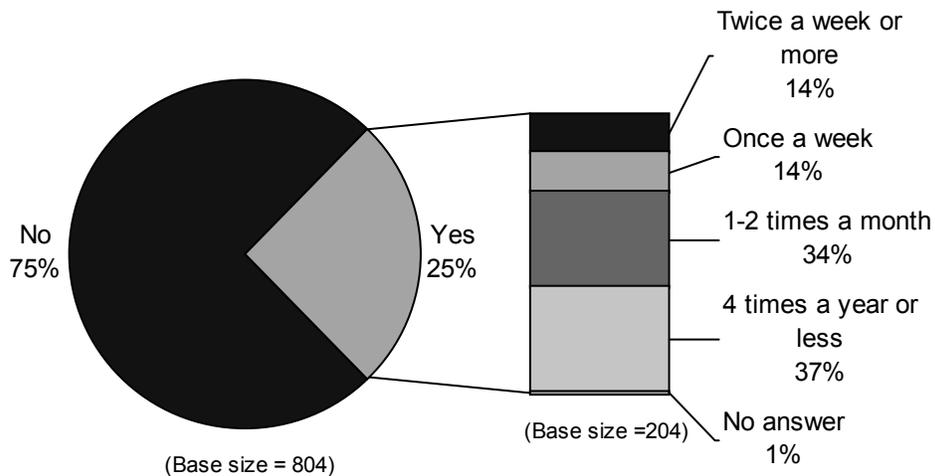


Residents with a high school education or less were significantly more likely than college graduates to say they gamble in convenience stores, grocery stores, or gas stations in the greater Las Vegas area (30% vs. 15%).

### Local Bars Or Restaurants

Clark County gamers were also asked if they ever gamble in local bars or restaurants in the greater Las Vegas area (Figure 19), and one-quarter (25%) said they did. Among those who do, 28% said they did so once a week or more, 34% said once or twice a month, 37% said less than once a month, and 1% gave no answer.

FIGURE 19  
Percentage Of Residents Who Gamble In Local Bars  
Or Restaurants And How Often They Do So

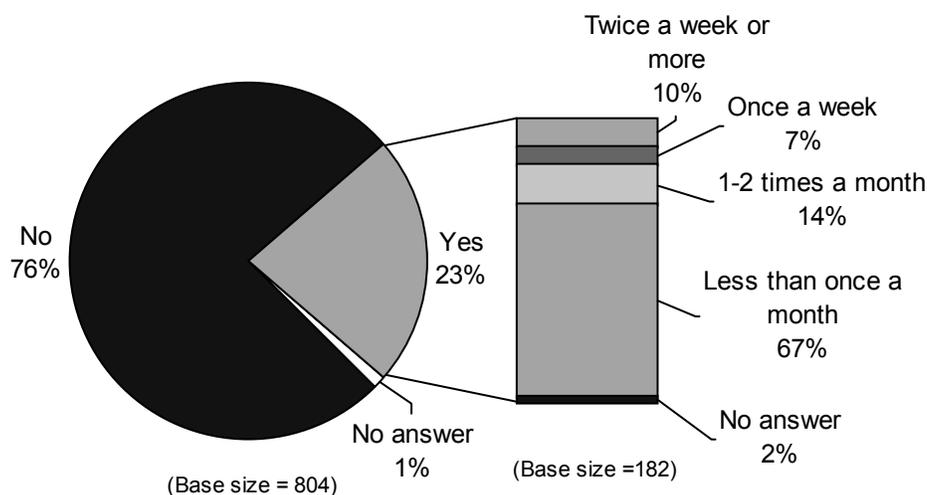


The likelihood of gambling in local bars and restaurants declines significantly with age, from 43% of those under 30 years old to just 14% of those 60 and older. Residents earning \$30,000 or more were significantly more likely than those earning less to say they gamble in local bars and restaurants (30% vs. 14%).

### Outside The Greater Las Vegas Area

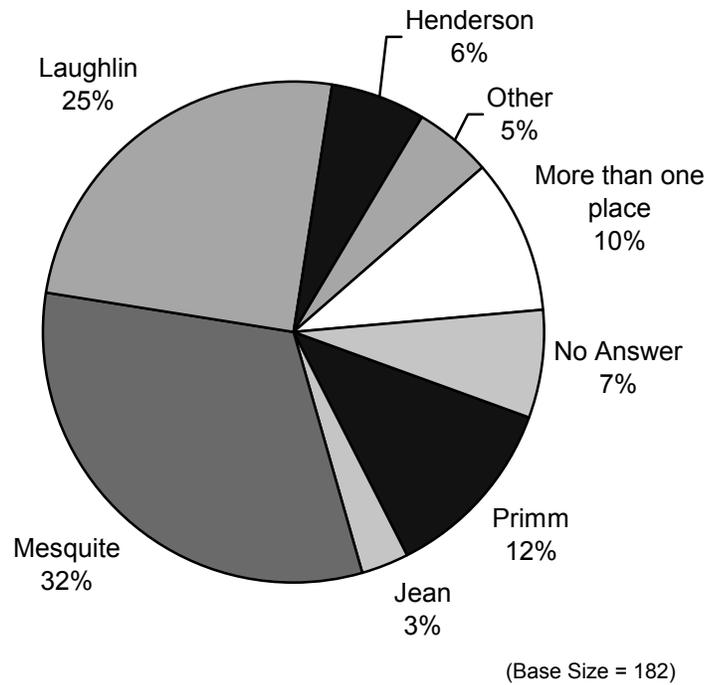
We asked residents who gamble if they ever gambled in Clark County — but outside the greater Las Vegas area (Figure 20) — and 23% said they did, up significantly from 19% in 2003-04. Of those who said they gamble outside of the greater Las Vegas area, two-thirds (67%) said they do so less than once a month, 14% said they gambled outside Las Vegas once or twice a month (down from 23% in 2003-04), and 17% said they did so once a week or more (up from 11%). Two percent (2%) gave no answer.

**FIGURE 20**  
Percentage Of Residents Who Gamble Outside The Greater Las Vegas Area And How Often They Do So



As might be expected, residents who live outside of Henderson and Las Vegas area (29%) were significantly more likely to say they gamble outside of Las Vegas than those who live in Henderson (16%) or Las Vegas (21%). Residents under 30 years old were the least likely to say they gamble outside of the greater Las Vegas area (11%), while residents 50 and older were the most likely (25%).

FIGURE 21  
Where Residents Gamble Outside Las Vegas  
(Among Those Who Gamble Outside Las Vegas)



Residents who gamble outside the Las Vegas area were asked in which town or community they gamble the most often (Figure 21). Nearly one-third (32%) said they gamble most often in Mesquite, while one-quarter (25%) said Laughlin. Other areas mentioned were Primm (12%), Henderson (6%, up from 2% in 2003-04), and Jean (3%). Five percent (5%) named a variety of other places outside of Las Vegas (down from 14%), while 10% said they gamble at more than one place “most often” (up from 3%). Seven percent (7%) gave no answer.

Retired residents were significantly more likely than employed residents to say they gamble in Laughlin the most often (34% vs. 22%).

## Estimated Gaming Budgets

We asked Clark County residents to tell us whether they engaged in legalized gambling even occasionally, how often they gambled, and how much they budgeted<sup>1</sup> on gambling. Two-thirds (67%) of adult residents said they gambled at least occasionally.

To determine gaming frequency, interviewers read respondents a list of frequency categories, and respondents identified the category which best described their behavior.

The frequency categories were:

- More than five times a week
- About twice a week
- About once a week
- About twice a month
- About once a month
- About four times a year
- About twice a year
- Once a year or less

To determine gaming budgets, respondents were asked: "On average, about how much money do you personally budget on gambling per (day, week, month or year)?" The choice of time period asked depended on whether the respondent described their gambling frequency in terms of times per week, month, or year, respectively.

---

<sup>1</sup> Respondents were asked to estimate the approximate dollar amount they *budgeted* on legalized gambling. This figure is not meant to reflect the total amount actually *spent* on legalized gambling by Clark County residents.

Budgeted amounts are asked because high proportions of respondents typically say they "don't know" or "refuse to answer" actual amounts spent on gambling.

We calculated the mean budget for each of the several time period categories with the following results:

Gambling frequency period	Budget amount <sup>1</sup>
More than five times a week	\$68.98
Once or twice a week	\$105.06
Once or twice a month	\$99.33
Four times a year or less	\$232.44

Next we calculated the total yearly amount budgeted on legalized gambling by all respondents, multiplying the frequency period *times* the mean budget per period *times* the number of respondents in each frequency period category, as follows:

<u>Gambling frequency period</u>	<u>Frequency (periods/year)</u>	<u>Mean budget per period</u>	<u>Number of respondents</u>	<u>Budgeted annually</u>
Daily (5 times per week)	260	\$68.98	59	\$1,058,153
Weekly	52	\$105.06	306	\$1,671,715
Monthly	12	\$99.33	261	\$311,102
Yearly	1	\$232.44	173	\$40,212
Don't gamble/no data <sup>2</sup>	0	\$00.00	401	\$ 0
			TOTAL	<u>\$3,081,182</u>

The sum of these calculations is \$3,081,182 — the total amount budgeted on legalized gambling per year among 1,200 randomly chosen Clark County residents — down from the \$3,420,018 budgeted among respondents in the 2003-2004 study.

Clark County has a total estimated adult population (21 years old or older) of 1,234,726. Since the estimated amount budgeted on legalized gambling per year per 1,200 Clark County adult residents is \$3,081,182 then the estimated annual amount budgeted per Clark County adult resident on casino gambling is \$2,567.65, and the *estimated annual amount budgeted by all Clark County adult residents* on casino gambling is around \$3.17 billion<sup>3</sup> (\$3,170,346,272).

<sup>1</sup> This analysis excludes a few gamblers who gave very extreme estimates of their gaming budgets.

<sup>2</sup> Includes respondents who do not gamble, and respondents who did not provide information about their gaming frequency.

<sup>3</sup> The estimated annual amount budgeted by all Clark County residents was \$853 million in the 1991-1992 study, \$772 million in the 1993-1994 study, \$1.4 billion in the 1995-1996 study, \$1.33 billion in the 1997-1998 study, \$1.77 billion in the 1999-2000 study, \$2.84 billion in the 2001-2002 study, and \$3.26 billion in the 2003-2004 study.

The accuracy of this estimate is necessarily limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

The categories used for the frequency of legalized gambling were purposely designed to be approximations ("*about* twice a week, *about* once a week" etc.) because it was believed that respondents would be unable to accurately recall the exact number of times they went to a casino to gamble over the past year. Because the frequency categories are approximate by design, the numbers we use to represent these categories in calculating the estimate are subject to a reasonable margin of error.

For example, a respondent who says he engages in legalized gambling "*about* once a week" may, in fact, go more or less than 52 times a year. For the sake of the estimate, we must *assume* that the mean for all respondents who said "*about* once a week" is 52, because we do not know the *actual* number of times per year that these respondents engaged in legalized gambling. The mean for these respondents might, in fact, be higher or lower than 52, but we cannot know that since we do not know the actual frequency of legalized gambling for each respondent.

With regard to the amount budgeted on legalized gambling per time period (day, week, month, year), we asked respondents to give us an exact dollar amount which represented an estimate of their *average* budget per time period. Even though respondents were asked to give an exact amount, the amount might be an over or underestimate of the average amount actually budgeted per time period. Again, since we cannot know how accurately respondents reported the amount they budgeted, we *assume* for the sake of the estimate that the average amount reported is accurate.

Furthermore, the estimate represents the potential total dollar amount *budgeted* per year on legalized gambling. This figure is not meant to reflect the total amount actually *spent* on legalized gambling per year by Clark County residents. (Budgeted amounts are asked because high proportions of respondents typically say they "don't know" or "refuse to answer" actual amounts spent on gambling.) There is no way to know for sure if budgeted amounts are greater or less than actual amounts spent. In determining potential total gaming *revenues*, it is safer to assume our estimate is at the high end of any revenue projection.

## Estimated Casino Gambling Market Share

We asked Clark County residents to tell us whether they engaged in casino gambling in the greater Las Vegas area, how often they gambled at a casino, and the location of the casino where they do most of their gambling. Forty-seven percent (47%) of all (adult) respondents said they gamble in casinos in the greater Las Vegas area at least occasionally.

To determine legalized gambling frequency, interviewers read respondents a list of frequency categories, and respondents identified the category which best described their behavior.

The frequency categories were:

- More than five times a week (260 days per year)
- About twice a week (104 days per year)
- About once a week (52 days per year)
- About twice a month (24 days per year)
- About once a month (12 days per year)
- About four times a year (4 days per year)
- About twice a year (2 days per year)
- Once a year or less (1 day per year)

Casino gamblers were also asked to give the name of one casino where they do most of their gambling. These responses were then categorized into the following groups:

- Strip Corridor
- Downtown
- Boulder Strip/Green Valley
- Henderson
- Summerlin
- North Las Vegas
- Other (not classifiable as to area)

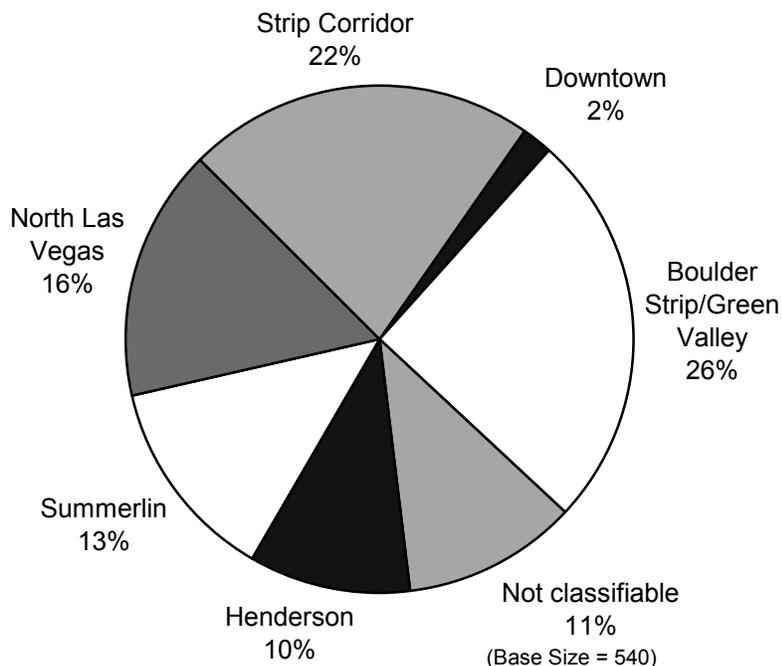
For each respondent, we determined the approximate number of days per year spent gambling in casinos and assigned that value to the location of the casino in which the respondent said they gambled most often. (Residents who did not tell us the frequency or the location of their casino gambling were excluded from this calculation.) We then calculated the total number of days spent by all respondents in each location, with the following results:

<u>Casino Location</u>	<u>Total Gambling Days</u>
Strip Corridor	5,658
Downtown	397
Boulder Strip/ Green Valley	6,478
Henderson	2,519
Summerlin	3,190
North Las Vegas	4,052
Other	<u>2,874</u>
<b>TOTAL</b>	<b><u>25,168</u></b>

Figure 22 shows the proportion of gambling days for each location — that is, estimated market share. Residents who gamble in casinos spent most of their time in outlying areas (39%, with 16% saying North Las Vegas, 13% Summerlin, and 10% Henderson, down significantly from 17% for Henderson in 2003-04), followed by the Boulder Strip/Green Valley Area (26%) and the Strip Corridor (22%). They spent the least time in Downtown casinos (2%).

**FIGURE 22**  
**Market Share**

(Computed Among Casino Gamblers Who Specified How Often They Gambled And In What Casino They Gambled Most Often)



The accuracy of this estimate is limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

The categories used for the frequency of casino gambling were purposely designed to be approximations ("*about* twice a week, *about* once a week" etc.) because it was believed that respondents would be unable accurately to recall the exact number of times they went to a casino to gamble over the past year. Because the frequency categories are approximate by design, the numbers we use to represent these categories in calculating the estimate are subject to a reasonable margin of error.

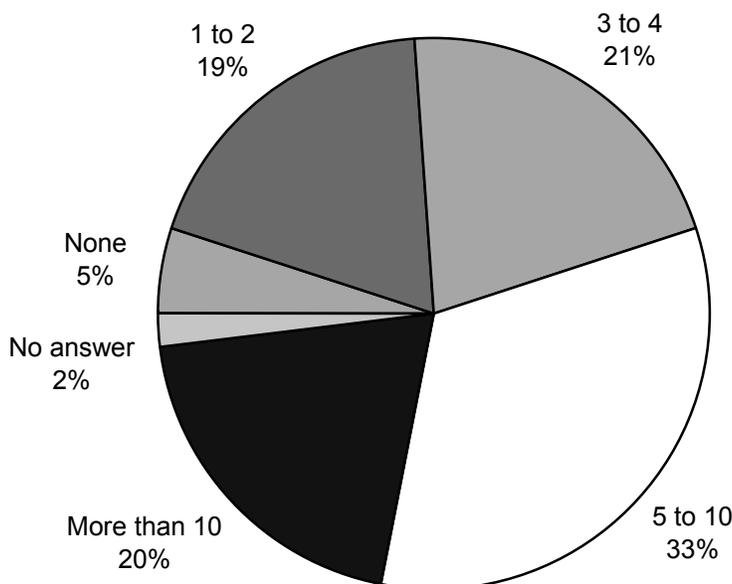
For example, a respondent who says he engages in casino gambling "*about* once a week" may, in fact, go more or less than 52 times a year. For the sake of the estimate, we must *assume* that the mean for all respondents who said "*about* once a week" is 52, because we do not know the *actual* number of times per year that these respondents engaged in casino gambling. The average for these respondents might, in fact, be higher or lower than 52, but we cannot know that since we do not know the actual frequency of casino gambling for each respondent.

Further, each respondent's frequency of casino gambling was arbitrarily assigned to the casino, which the respondent claimed to visit most often, as though all of the respondent's casino gambling time was spent in that casino. In fact, many respondents gamble in more than one casino, but it was deemed impractical to ask respondents to list all casinos they recalled visiting in the past year and the proportion of total casino gambling time spent in each.

## RESTAURANTS

We asked residents how many dinners they ate out on average every month (Figure 23). Nineteen percent (19%) said they dine out once or twice per month (up from 15% in 2003-04), 21% said they do so three to four times a month, 33% said five to ten times, and 20% said more than ten times. Five percent (5%) said they did not dine out at all, and 2% gave no answer. Overall, residents dined out an average of 7.1 times per month, down significantly from an average of 7.6 in 2003-04.

FIGURE 23  
Number of Dinners Eaten Out Every Month

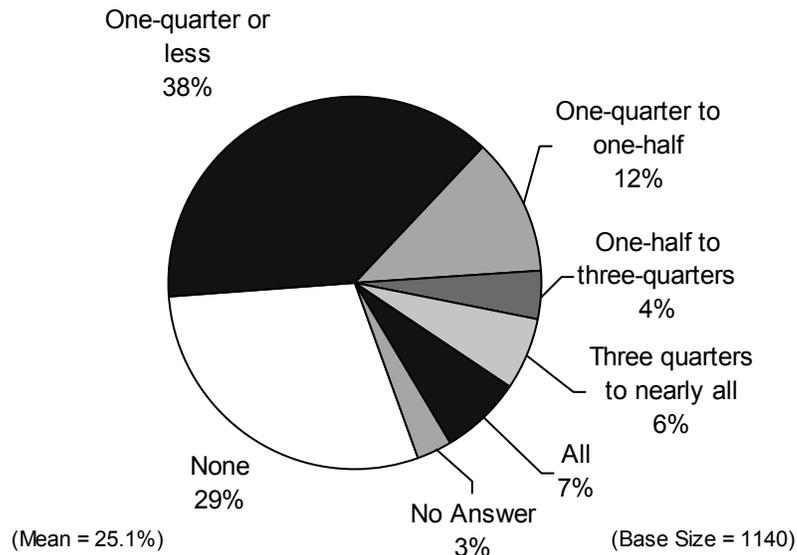


(Mean = 7.1)

The number of dinners eaten out increases significantly with household income, from an average of 5.3 dinners per month among those earning less than \$30,000 to 6.7 dinners per month among those earning between \$30,000 to less than \$50,000 to 7.9 dinners per month among those earning \$50,000 or more.

Residents who gamble also eat out more often (average of 7.4 dinners per month) than those who do not gamble (6.3), as do men compared to women (7.5 vs. 6.6 dinners per month), and those with no children living at home compared to those with children (7.9 vs. 6.4 dinners per month).

FIGURE 24  
Proportion of Dinners Eaten in Hotel/Motel Restaurants  
(Among Those Who Dine Out)

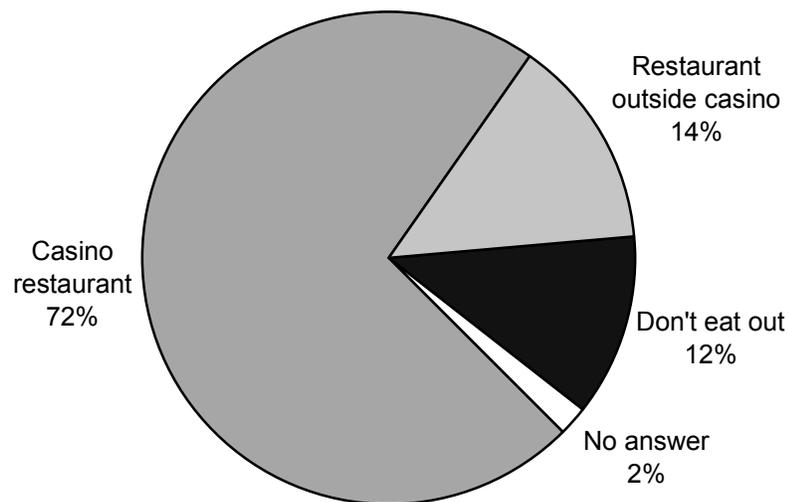


Respondents who dine out were asked what percentage of these dinners were eaten in hotel or motel restaurants (Figure 24). Twenty-nine percent (29%) said none of them were, and 50% said the proportion was one-half or less. One in six (17%) said that more than one-half of their meals were eaten in hotel or motel restaurants. The average percentage of meals eaten in a hotel or motel restaurant was 25.1%.

Residents in the following subgroups report eating a significantly higher proportion of their dinners at hotel or motel restaurants:

- Residents who gamble (average of 29.6% of all dinners eaten out) compared to those who do not gamble (15.2%).
- Residents 60 and older (34.2%) compared to those under 60 years old (20.6%).
- Retired residents (32.5%) compared to employed residents (22.6%).
- Those with no children living at home (28.9% vs. 15.8%).
- Men (27.5%) compared to women (22.7%).
- Those earning less than \$30,000 (28.4%) compared to those earning \$50,000 or more (22.5%).

FIGURE 25  
Where Residents Eat When  
Gambling In A Casino  
(Among Those Who Gamble In Las Vegas Area Casinos)



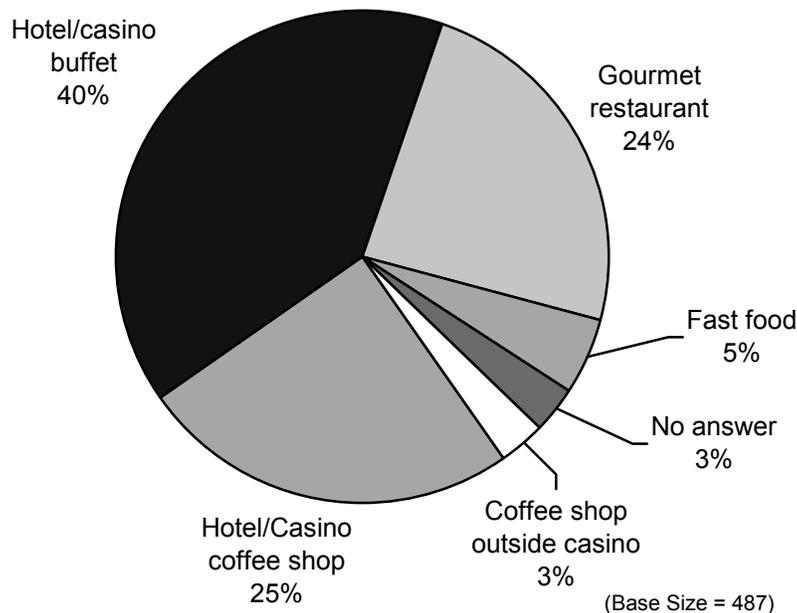
(Base Size = 569)

We asked residents who go to casinos to gamble if they usually eat in a casino restaurant or in a restaurant outside the casino where they gamble (Figure 25). Seventy-two percent (72%) of these respondents said they usually eat at a casino restaurant, 14% eat at a restaurant outside the casino (down from 21% in 2003-04), and 12% volunteered that they do not eat when they gamble at a casino (up from 8%).

The likelihood of eating at a casino restaurant tends to increase with age, with those 50 and older particularly more likely than those under 50 years old to do so (78% vs. 63%). By contrast, those under 50 years old were more likely to eat at a restaurant outside a casino (22% vs. 9% among those 50 and older).

Women were also more likely than men to eat at casino restaurants (78% vs. 65%), while men were more likely than women to eat at restaurants outside a casino (20% vs. 8%).

FIGURE 26  
Type Of Restaurant Usually  
Patronized When Gambling In A Casino  
(Among Those Who Eat Out When They Gamble At Las Vegas Area Casinos)



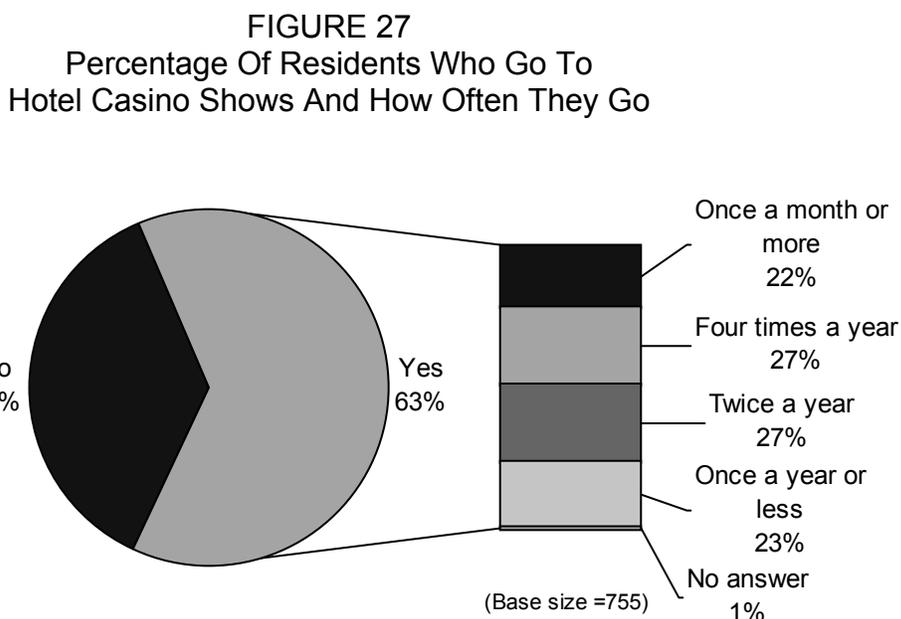
Four in ten (40%) residents who eat out when they go to a casino to gamble usually eat at a buffet in a hotel, motel, or casino (Figure 26). Twenty-eight percent (28%) said they usually eat at a coffee shop, with 25% saying the coffee shop is in a hotel, motel, or casino and 3% saying the coffee shop is outside the casino. One-quarter (24%) said they usually dine at a gourmet restaurant, and 5% said they eat at fast food restaurants.

The likelihood of eating at a hotel/casino buffet tends to decline with income from 52% of those earning less than \$30,000 per year to 34% of those earning \$50,000 or more. Those earning \$50,000 or more were significantly more likely to eat at a gourmet restaurant than those earning less (35% vs. 10%).

Those who usually eat at a hotel/casino buffet when they go to a casino to gamble were more likely to be 60 and older (52% vs. 35% of those under 60 years old) and retired (53% vs. 34% of those who are employed). By contrast, those who usually eat at gourmet restaurants were more likely to be under 60 years old (31% vs. 12%) and employed (29% vs. 14% of those who are retired).

## ENTERTAINMENT

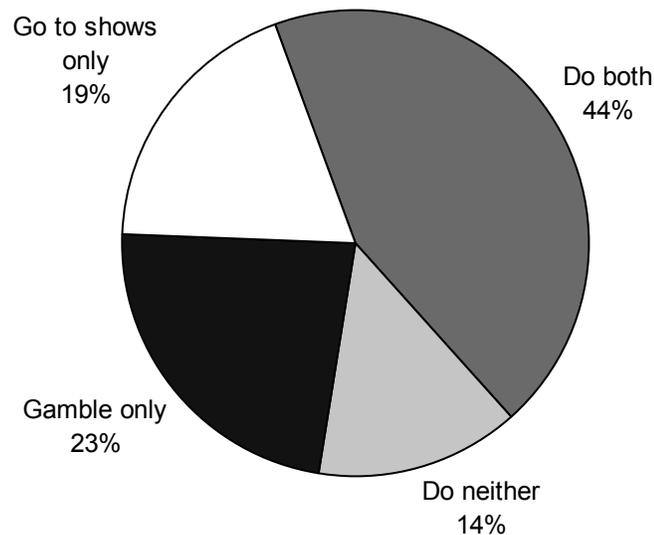
Sixty-three percent (63%) of residents said they have been to a hotel casino show (Figure 27). Twenty-two percent (22%) of those who attend shows said they go once a month or more, while 27% said they go four times a year, another 27% said they go twice a year, and 23% said they go once a year or less.



Subgroup differences with regard to hotel casino show attendance included the following:

- Residents who gamble (65%) were significantly more likely than those who do not (59%) to say they have been to a hotel casino show.
- The likelihood of having ever attended a hotel casino show increases with income, from 46% of those who earn less than \$30,000 to 70% among those who earn \$50,000 or more.
- Attendance at hotel casino hotel shows also tends to increase with education, from 51% of those with a high school education or less to 73% of college graduates.

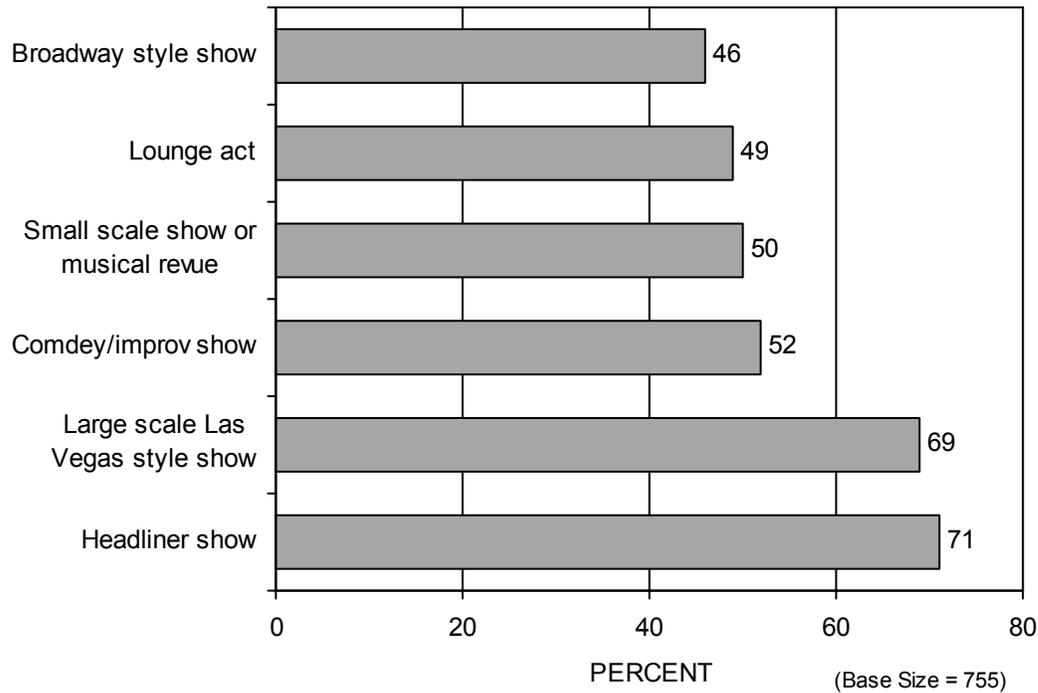
FIGURE 28  
Relationship Between Gambling  
And Hotel Casino Show Attendance



With regard to the relationship between gambling and hotel casino show attendance among all residents, we see that 44% of Clark County residents both gamble and go to hotel casino shows, 23% gamble but do not go to hotel casino shows, 19% go to hotel casino shows but do not gamble (up significantly from 15% in 2003-04), and 14% neither gamble nor go to hotel casino shows (Figure 28).

The likelihood of both gambling and going to shows tended to increase with income, from 36% of those earning less than \$30,000 to 47% of those earning \$50,000 or more.

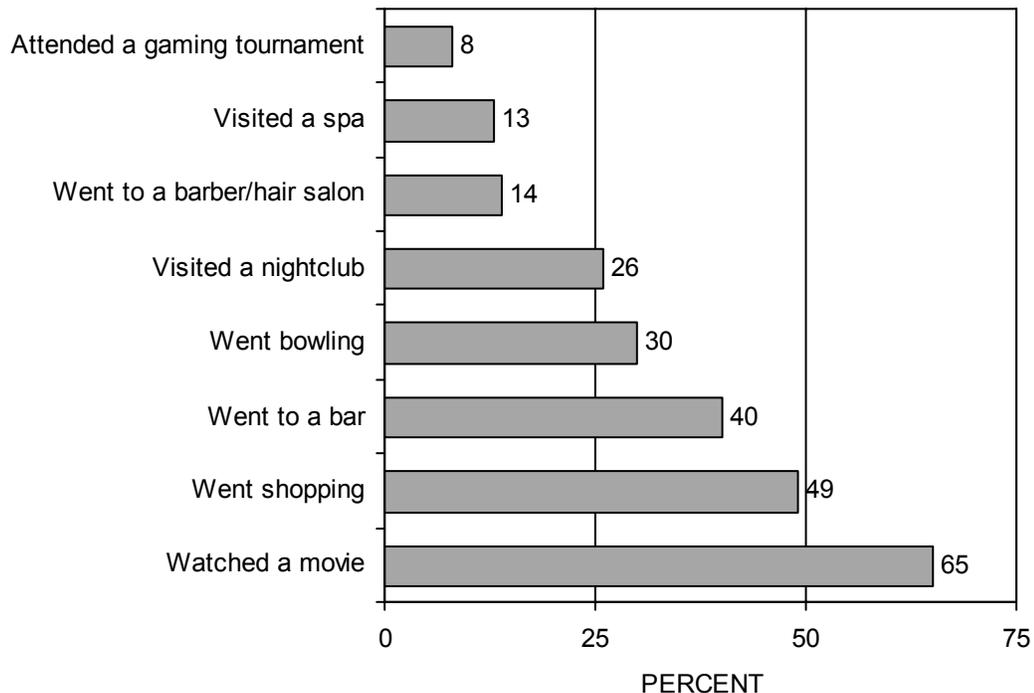
FIGURE 29  
Type Of Hotel Casino Shows Attended  
(Among Those Who Have Been To Hotel Casino Shows)



Among those who have been to a hotel casino show, 71% have been to a headliner show, 69% to a large-scale Las Vegas style show, 52% to a comedy or improv show, 50% to a small scale revue (down from 58% in 2003-04), 49% to a lounge act (down from 54%), and 46% to a Broadway style show (Figure 29).

Residents who earn \$50,000 or more were significantly more likely than those who earn less to have attended large-scale Las Vegas style shows (78% vs. 57%) and Broadway style shows (52% vs. 35%).

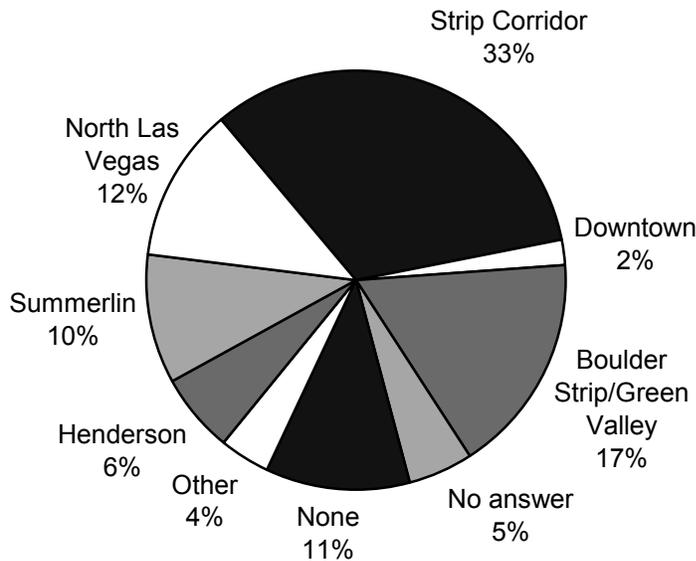
FIGURE 30  
Other Leisure Activities Engaged In At Casino Hotels



All respondents were read a list of other leisure activities and were asked whether they had engaged in each leisure activity at a casino-hotel within the past 12 months. Two-thirds (65%) said they watched a movie at a casino-hotel, while just under one-half (49%) said they went shopping, four in ten (40%) said they had gone to a bar (down from 44% in 2003-04), three in ten (30%) went bowling, and one-quarter (26%) visited a nightclub. Smaller numbers said they went to a barber or hair salon (14%), visited a spa (13%), or attended a slot or other type of gaming tournament (8%).

Gamers were significantly more likely than non-gamers to say they went to a bar (45% vs. 29%), visited a nightclub (30% vs. 19%), or attended a gaming tournament (11% vs. 1%). Those earning \$50,000 or more were more likely than those earning less to say they watched a movie (75% vs. 57%), went to a bar (46% vs. 34%), went bowling (35% vs. 28%), or visited a spa (16% vs. 9%). Residents under 40 years old were more likely than older residents to go to a bar (57% vs. 33%) or visited a nightclub (43% vs. 20%).

FIGURE 31  
Location of Hotel-Casino Residents Visit Most Often  
For Leisure Or Entertainment Other Than Gambling



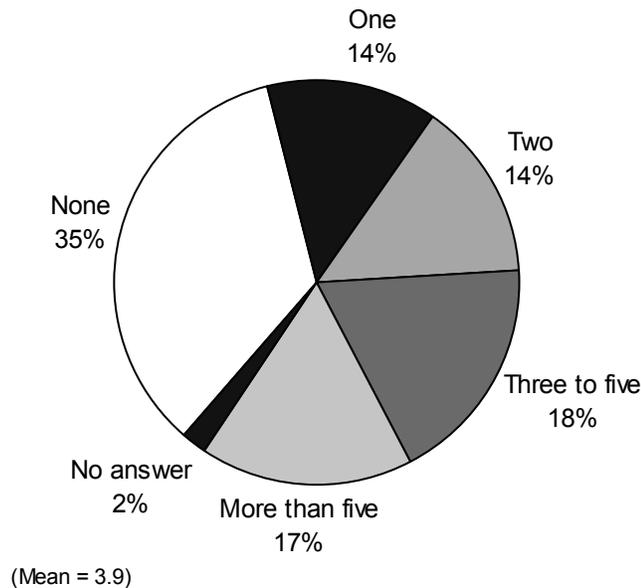
We asked residents the location of the casino they go to most often for leisure or entertainment other than gambling (Figure 31). Thirty-three percent (33%) mentioned a casino on the Strip Corridor, 17% mentioned a location on the Boulder Strip or in the Green Valley area, 12% said North Las Vegas, 10% Summerlin, 6% Henderson, 2% mentioned Downtown, and 4% mentioned other locations. Eleven percent (11%) said they do not go to any casinos for leisure or entertainment (up from 3% in 2003-04), and 5% gave no answer at all (down from 11%).

The likelihood of going to a casino on the Strip for non-gaming entertainment tends to decline with age, with attendance greatest among residents under 30 years old (48%) and smallest among those 60 and older (27%).

### USE OF AIR AND GROUND TRANSPORTATION

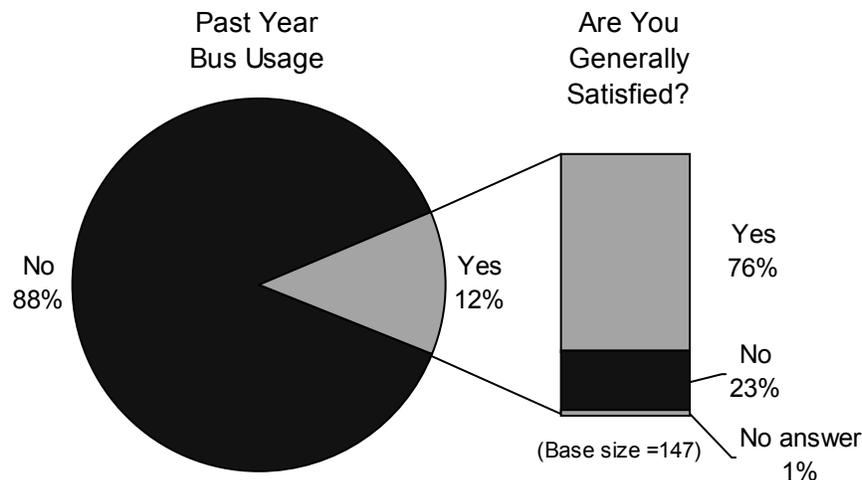
We asked Clark County residents how many flights they have made out of McCarran International Airport during the past 12 months (Figure 32). Thirty-five percent (35%) of Clark County residents said they had not flown from McCarran during the past year, while 14% said they had flown once, 14% twice, 18% three to five times, and 17% more than five times. The *average* (mean) number of flights was 3.9.

FIGURE 32  
Number Of Flights From McCarran Airport  
During Past 12 Months



Men took significantly more flights out of McCarran in the past 12 months (average of 5.1 flights) than women (2.7). Residents who earn \$50,000 or more also took significantly more flights (5.5) than those who earn less (1.6). Residents 60 and older took significantly fewer flights than those under 60 years old (2.5 vs. 4.5).

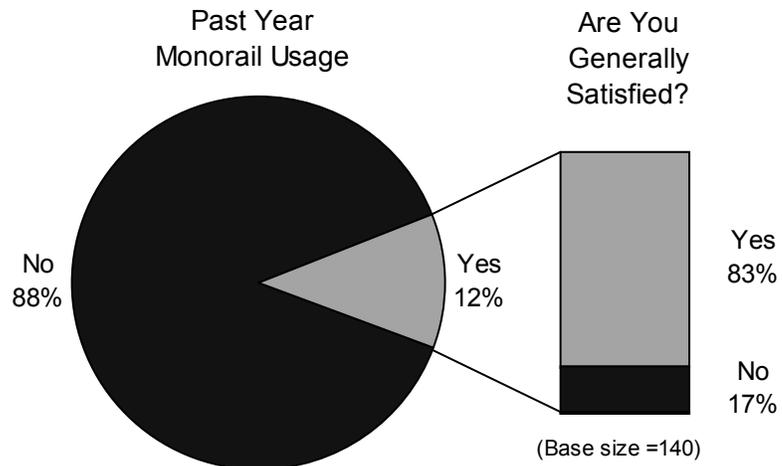
FIGURE 33  
Past Year Bus Usage And Satisfaction



We asked respondents if they had used the public bus system to travel in the Las Vegas area during the past year, and 12% said they had (Figure 33). Bus usage was significantly higher among men (15% vs. 10% of women), those earning less than \$30,000 (30% vs. 9% of those who earn more), and residents under 30 years old (24% vs. 11%).

Approximately three-quarters (76%) of those who had used the public bus system in the Las Vegas area in the past year said they were generally satisfied with the service provided.

FIGURE 34  
 Past Year Monorail Usage And Satisfaction

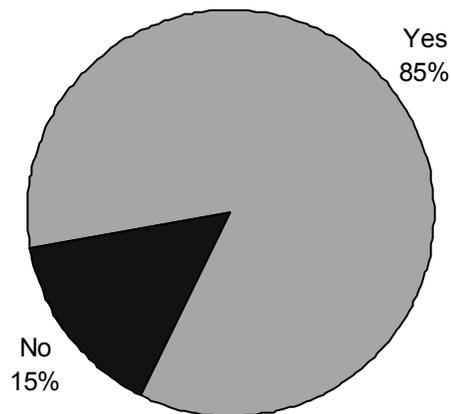


We asked respondents if they had used the Las Vegas Monorail to travel in the Las Vegas Strip area during the past year, and 12% said they had (Figure 34). More than eight in ten (83%) of those who had used the Las Vegas Monorail in the past year said they were generally satisfied with the service provided.

## FREMONT STREET EXPERIENCE VISITATION

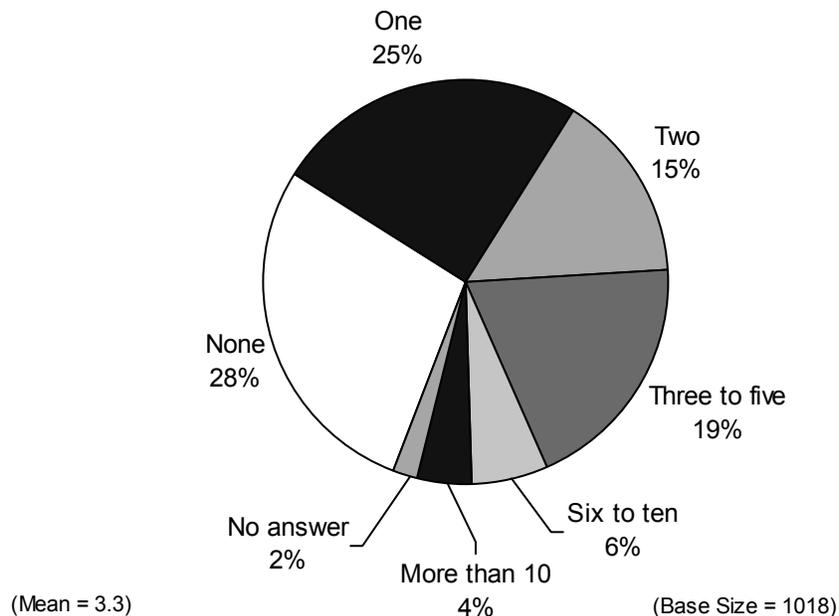
We asked residents if they had ever visited the Fremont Street Experience located in Downtown Las Vegas, and more than eight in ten (85%) said they had (Figure 35).

FIGURE 35  
Percentage Of Residents  
Who Have Been To The Fremont Street Experience



Gamers were significantly more likely than non-gamers to say they have visited the Fremont Street Experience (88% vs. 79%).

FIGURE 36  
Number Of Times Visited  
The Fremont Street Experience During Past Year  
(Among Those Who Have Ever Been To The Fremont Street Experience)



We asked residents who have been to the Fremont Street Experience how many times they had been to the Fremont Street Experience during the past 12 months (Figure 36). Twenty-eight percent (28%) of these respondents said they did not go at all in the past 12 months, 25% had been only once, 15% had been twice, 19% three to five times, and 10% more than five times. Among all respondents who had ever been to the Fremont Street Experience, the average number of visits to the Fremont Street Experience in the past 12 months was 3.3. Among those who actually visited the Fremont Street Experience in the past 12 months, the average number of visits was 4.7. Residents under 30 years visited the Fremont Street Experience the most frequently over the past 12 months (average of 5.5 visits) while those 60 and older visited the least frequently (2.1 visits).

Past year visitors to the Fremont Street Experience were asked about the activities they had participated in (or seen) while visiting. The most popular activities was having seen the light show (88%), followed by seeing the street performers (66%), and dining at a restaurant there (58%). Thirty-six percent (36%) gambled while at the Fremont Street Experience, while 32% purchased

something at a retail location, 26% attended a special event, and 18% went to a lounge or showroom to see some type of entertainment.

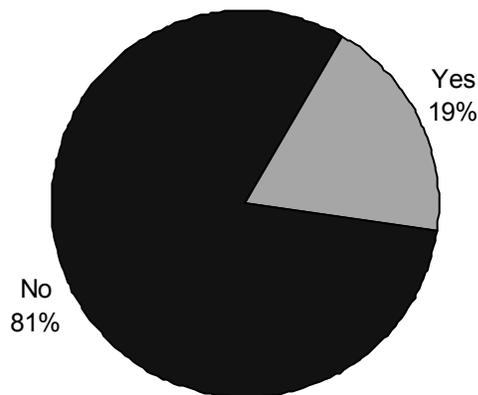
Nearly one-half (49%) of gamers said they have gambled at the Fremont Street Experience in the past 12 months. Gamers were also significantly more likely than non-gamers to say they saw the light show at the Fremont Street Experience (90% vs. 83%), while non-gamers were more likely than gamers to say they attended a special event there (31% vs. 24%).

Residents 60 and older were significantly more likely than those under 60 years old to have gambled at the Fremont Street Experience in the past 12 months (47% vs. 32%).

## OTHER CLARK COUNTY TRAVEL DESTINATIONS

We asked residents if they had taken a trip to Mesquite within the past 12 months for purposes other than work or personal business<sup>1</sup>. Nineteen percent (19%) said they had (Figure 37).

FIGURE 37  
Percentage Of Residents Who Have Taken  
A Non-Business Trip To Mesquite During The Past Year  
(Among Non-Residents Of Mesquite)



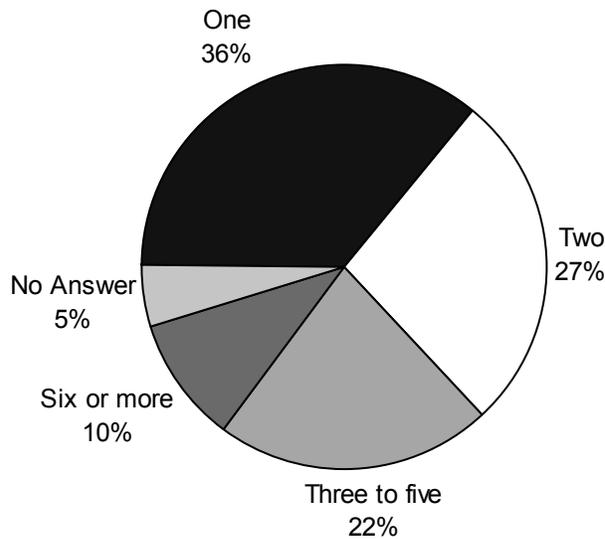
(Base Size = 1176)

The likelihood of having visited Mesquite in the past 12 months tended to increase with income, from 13% of those earning less than \$30,000 per year to 22% of those earning \$50,000 or more. Residents who gamble were significantly more likely to have visited Mesquite than those who do not gamble (21% vs. 14%), as were men compared to women (22% vs. 15%). Residents under 30 years old were significantly less likely to visit Mesquite than those 30 and older (9% vs. 19%).

---

<sup>1</sup> Excluding the 24 respondents – 2% – who identified themselves as residents of Mesquite.

**FIGURE 38**  
 Number Of Times Visited Mesquite During The Past Year  
 (Among Those Who Took A Non-Business  
 Trip To Mesquite In The Past 12 Months)

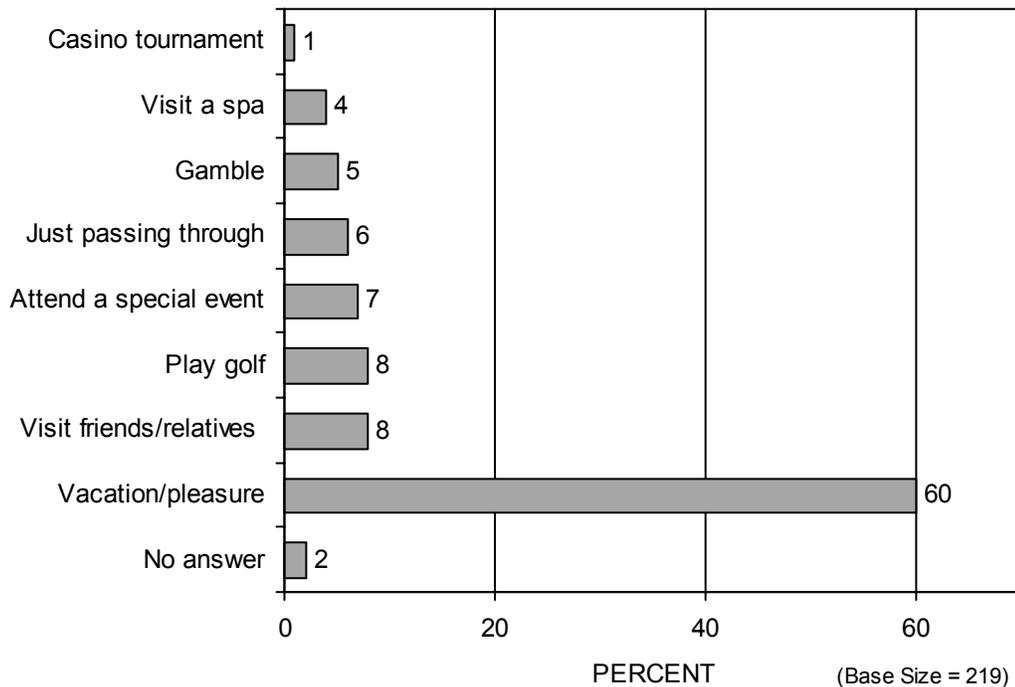


(Mean = 3.0)

(Base Size = 219)

We asked residents how many times they had visited Mesquite during the past 12 months for purposes other than work or personal business (Figure 38). Thirty-six percent (36%) said they had been to Mesquite once, 27% had been twice, 22% three to five times, and 10% had been six or more times. The average number of visits to Mesquite in the past 12 months was 3.0.

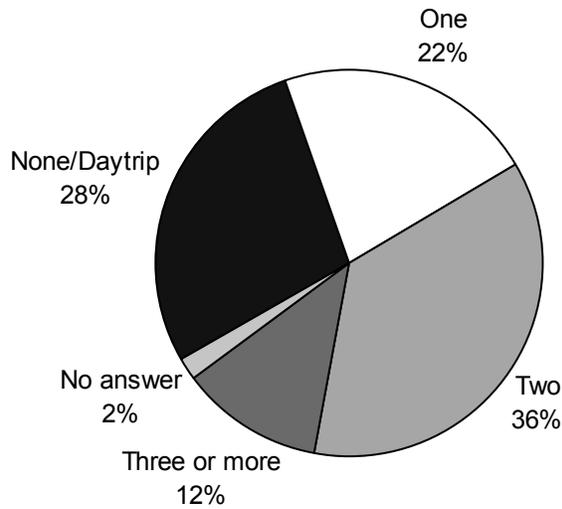
**FIGURE 39**  
**Primary Purpose Of Most Recent Trip To Mesquite**  
 (Among Those Who Took A Non-Business  
 Trip To Mesquite In The Past 12 Months)



We asked residents who had taken a non-business trip to Mesquite in the past 12 months what was the primary purpose of their most recent trip there (Figure 39). Six in ten (60%) said it was for vacation or pleasure. Eight percent (8%) said they were visiting friends or relatives, another 8% said they came to play golf, 7% said they were attending a special event, 6% said they were just passing through, 5% said they came primarily to gamble, 4% came to visit a spa, and 1% said they were attending a casino tournament.

Men were significantly more likely than women to visit Mesquite primarily to play golf (11% vs. 3%), while those with children under 13 years old were more likely to visit Mesquite for vacation or pleasure (69%) than those with children older than 13 (50%).

FIGURE 40  
Number Of Nights Stayed In Mesquite On Most Recent Trip  
(Among Those Who Took A Non-Business  
Trip To Mesquite In The Past 12 Months)

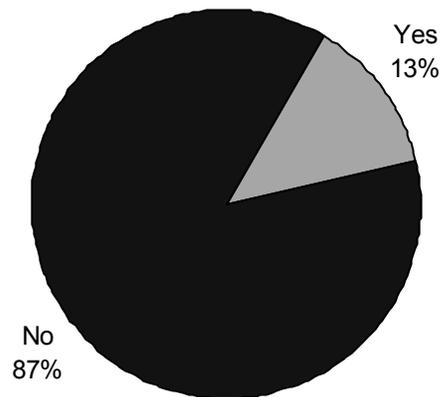


(Mean = 1.5)

(Base Size = 219)

Respondents were asked how many nights they stayed in Mesquite on their most recent non-business trip there in the past year (Figure 40). Twenty-eight percent (28%) said they did not spend any nights in Mesquite, but 22% said they spent one night, 36% spent two nights, and 12% spent three or more nights. The average number of nights stayed for all respondents was 1.5, while the average number of nights stayed excluding those on daytrips was 2.1.

FIGURE 41  
Percentage Of Residents Who Have Taken  
A Non-Business Trip To Laughlin During The Past Year  
(Among Non-Residents Of Laughlin)



(Base Size = 1194)

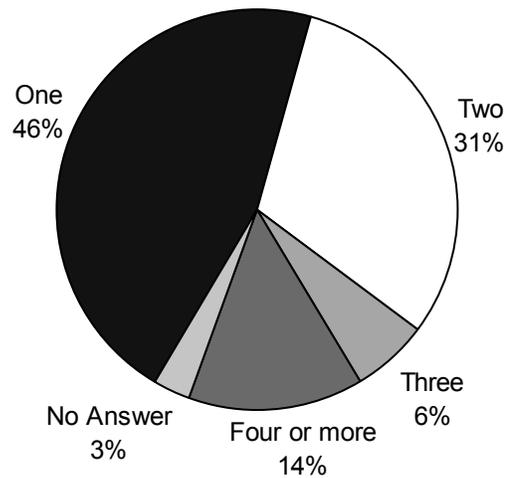
We asked residents if they had taken a trip to Laughlin within the past 12 months for purposes other than work or personal business<sup>1</sup>. Thirteen percent (13%) said they had (Figure 41), down significantly from 19% in 2003-04.

Residents who gamble were significantly more likely than those who do not gamble to say they visited Laughlin in the past 12 months (16% vs. 7%).

---

<sup>1</sup> Excluding the 6 respondents – 1% – who identified themselves as residents of Laughlin.

FIGURE 42  
Number Of Times Visited Laughlin During The Past Year  
(Among Those Who Took A Non-Business  
Trip To Laughlin In The Past 12 Months)

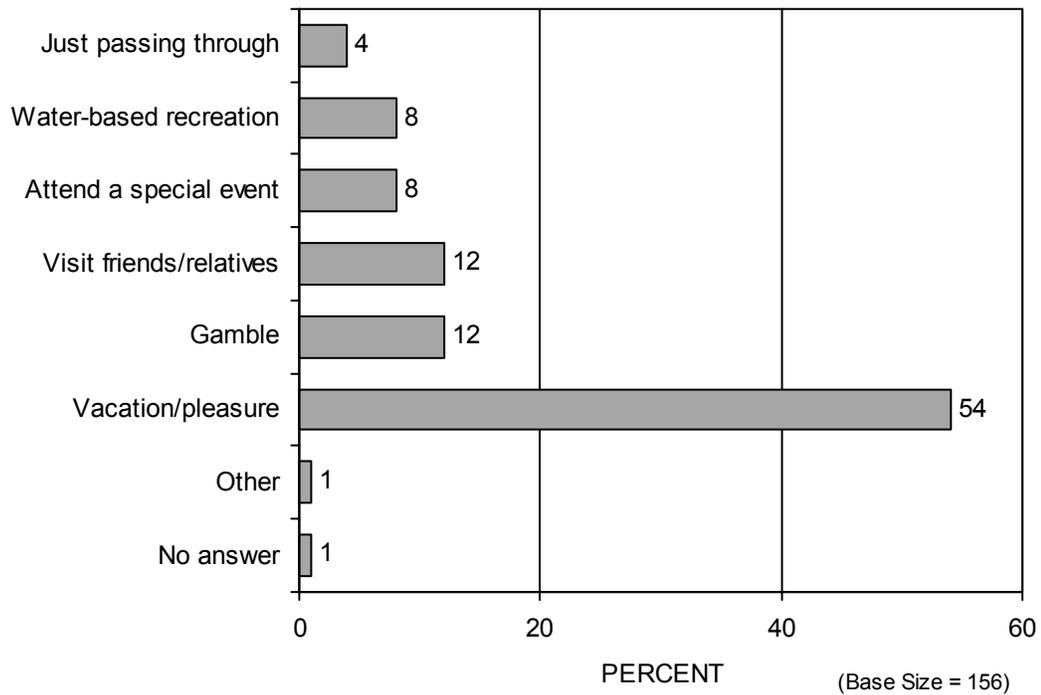


(Mean = 2.2)

(Base Size = 156)

We asked residents how many times they had visited Laughlin during the past year for purposes other than work or personal business (Figure 42). Forty-six percent (46%) said they had been once, 31% said they had been twice, and 20% said they had been three or more times. The average number of visits to Laughlin in the past 12 months was 2.2.

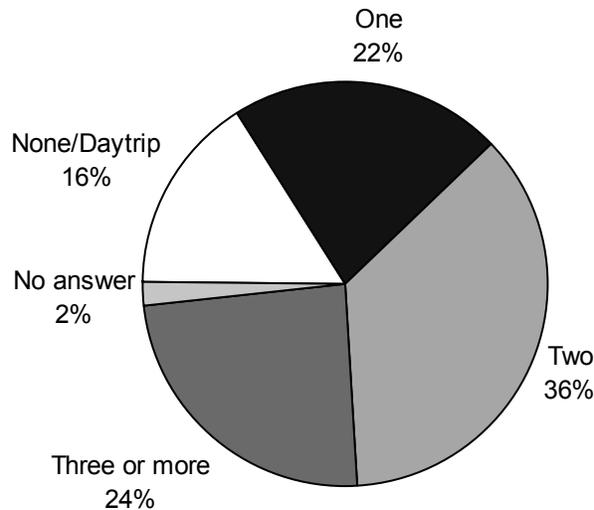
**FIGURE 43**  
**Primary Purpose Of Most Recent Trip To Laughlin**  
 (Among Those Who Took A Non-Business  
 Trip To Laughlin In The Past 12 Months)



We asked residents who had taken a non-business trip to Laughlin in the past 12 months what was the primary purpose of their most recent trip there (Figure 43). More than one-half (54%) said it was for vacation or pleasure. Twelve percent (12%) said they were visiting Laughlin primarily to gamble, another 12% said they were visiting friends or relatives, 8% said they were attending a special event, another 8% said they were visiting for water-based recreation, and 4% said they were just passing through.

The likelihood of visiting Laughlin for vacation or pleasure increased with income, from 31% of those earning less than \$30,000 to 59% of those earning \$50,000 or more.

FIGURE 44  
Number Of Nights Stayed In Laughlin On Most Recent Trip  
(Among Those Who Took A Non-Business  
Trip To Laughlin In The Past 12 Months)

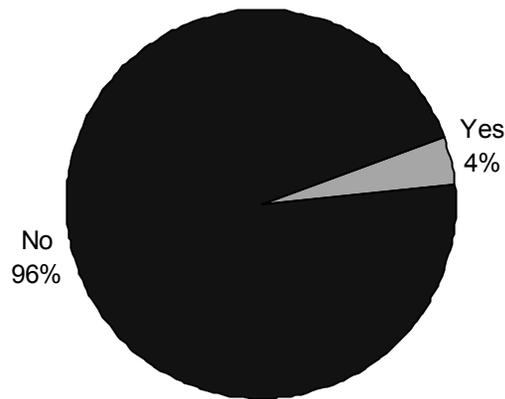


(Mean = 2.0)

(Base Size = 156)

Respondents were asked how many nights they stayed in Laughlin on their most recent non-business trip there in the past year. Sixteen percent (16%) said they did not spend any nights in Laughlin (down significantly from 26% in 2003-04), but 22% said they spent one night, 36% spent two nights, and 24% spent three or more nights. The average number of nights stayed for all respondents was 2.0 (up significantly from an average of 1.6 nights in 2003-04), while the average number of nights stayed excluding those on daytrips was 2.4.

FIGURE 45  
Percentage Of Residents Who Have Taken  
A Non-Business Trip To Jean During The Past Year  
(Among Non-Residents Of Jean)



(Base Size = 1199)

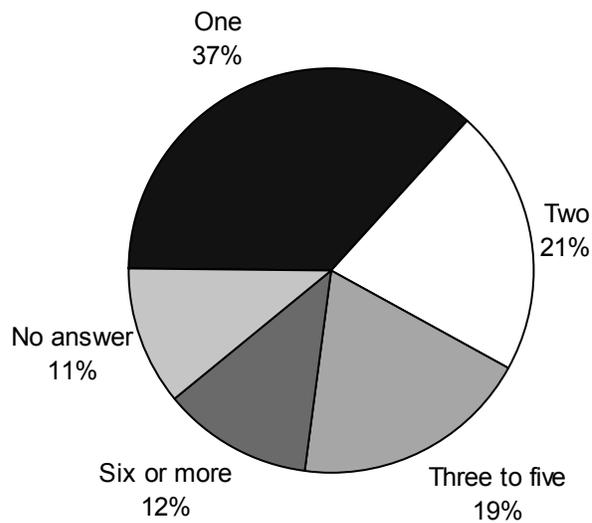
We asked residents if they had taken a trip to Jean within the past 12 months for purposes other than work or personal business<sup>1</sup>. Four percent (4%) said they had (Figure 45), down significantly from 8% in 2003-04.

Men were more likely than women to have visited Jean in the past 12 months (6% vs. 3%).

---

<sup>1</sup> Excluding the 1 respondent – less than 1% – who identified himself as a resident of Jean.

FIGURE 46  
Number Of Times Visited Jean During The Past Year  
(Among Those Who Took A Non-Business  
Trip To Jean In The Past 12 Months)

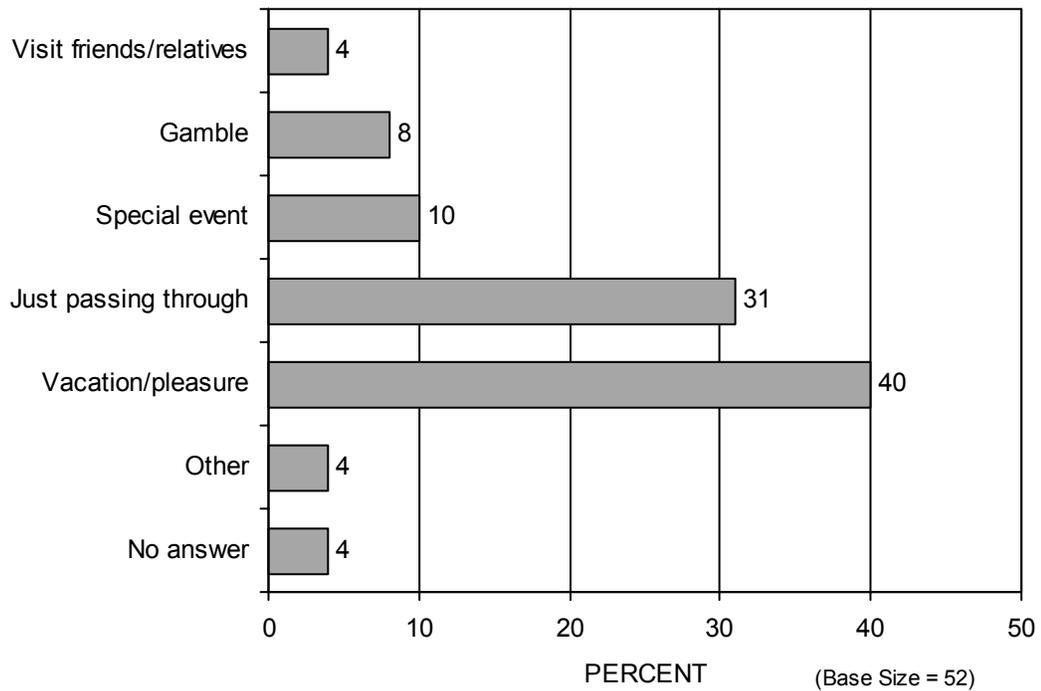


(Mean = 3.5)

(Base Size = 52)

We asked residents how many times they had visited Jean during the past year for purposes other than work or personal business (Figure 46). Thirty-seven percent (37%) said they had been once, 21% had been twice, 19% had been three to five times, and 12% had visited six or more times. The average number of visits to Jean in the past 12 months was 3.5.

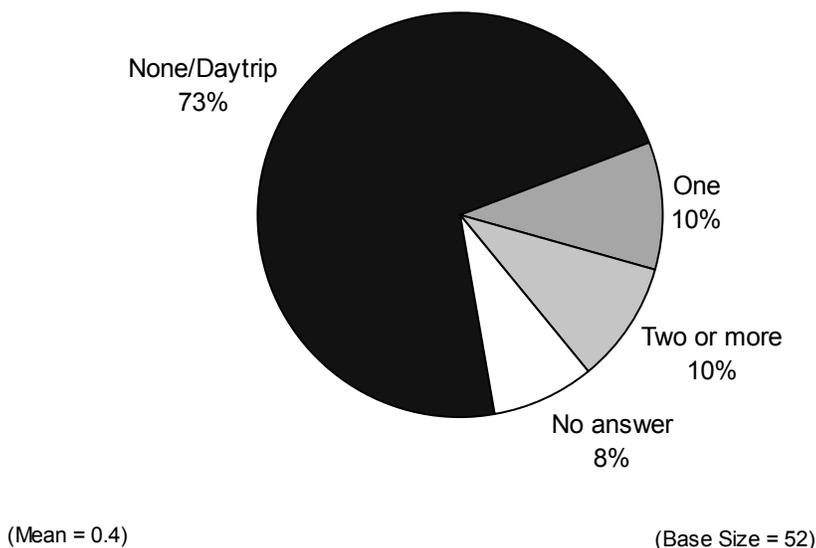
**FIGURE 47**  
**Primary Purpose Of Most Recent Trip To Jean**  
 (Among Those Who Took A Non-Business  
 Trip To Jean In The Past 12 Months)



We asked residents who had taken a non-business trip to Jean in the past 12 months what was the primary purpose of their most recent trip there (Figure 47). Forty percent (40%) said it was for vacation or pleasure, while 31% said they were just passing through (up significantly from 15% in 2003-04). Relatively smaller numbers of respondents said they were visiting Jean for a special event (10%), to gamble (8%), or to visit friends or relatives (4%).

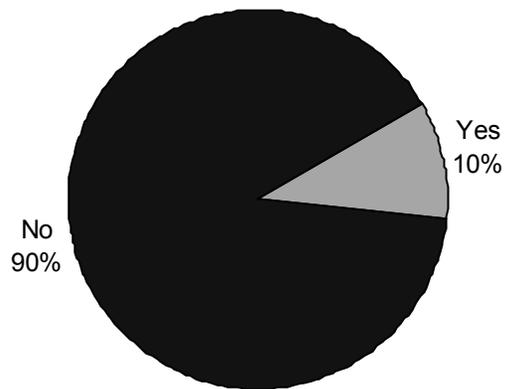
Women were significantly more likely than men to say they visited Jean primarily for vacation or pleasure (58% vs. 30%).

FIGURE 48  
Number Of Nights Stayed In Jean On Most Recent Trip  
(Among Those Who Took A Non-Business  
Trip To Jean In The Past 12 Months)



Respondents were asked how many nights they stayed in Jean on their most recent non-business trip there in the past year. Nearly three-quarters (73%) said they did not spend any nights in Jean, but 10% said they spent one night and 10% said they spent two or more nights. Eight percent (8%) said they were not sure how many nights they stayed or otherwise gave no answer. The average number of nights stayed for all respondents (including daytrippers) was 0.4, while the average number of nights stayed excluding those on daytrips was 1.9.

FIGURE 49  
Percentage Of Residents Who Have Taken  
A Non-Business Trip To Primm During The Past Year



(Base Size = 1198)

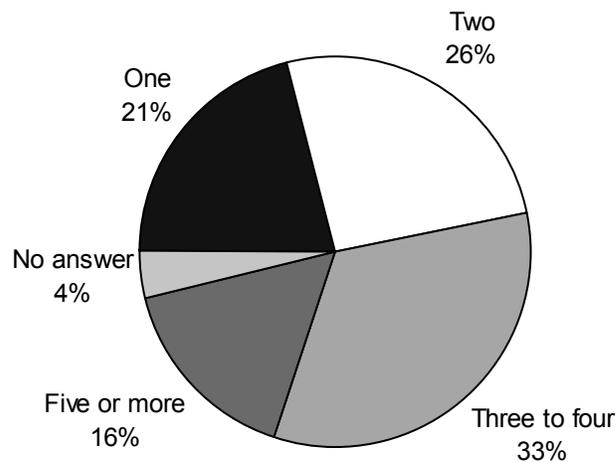
We asked residents if they had taken a trip to Primm within the past 12 months for purposes other than work or personal business<sup>1</sup>. Ten percent (10%) said they had (Figure 49), down significantly from 17% in 2003-04.

Residents who gamble were significantly more likely to have visited Primm in the past 12 months than those who do not gamble (13% vs. 4%). The likelihood of visiting Primm also tended to increase with income, from 6% of those earning less than \$30,000 to 12% of those earning \$50,000 or more.

---

<sup>1</sup> Excluding the 2 respondents – less than 1% – who identified themselves as residents of Primm.

FIGURE 50  
Number Of Times Visited Primm During The Past Year  
(Among Those Who Took A Non-Business  
Trip To Primm In The Past 12 Months)

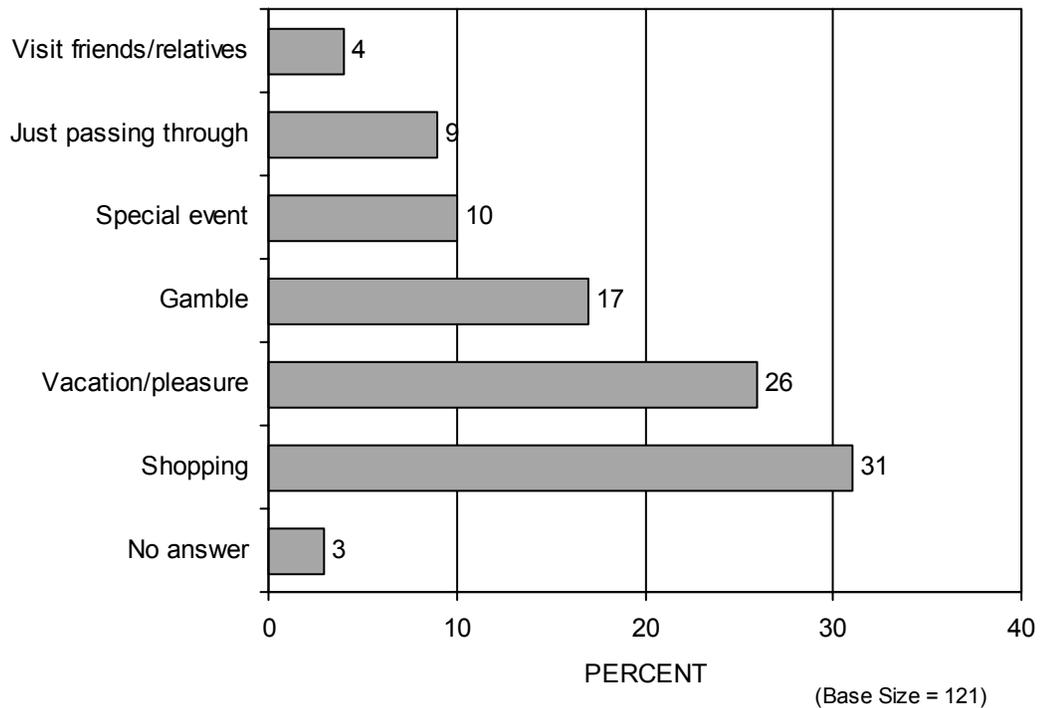


(Mean = 3.3)

(Base Size = 121)

We asked residents how many times they had visited Primm during the past year for purposes other than work or personal business (Figure 50). Twenty-one percent (21%) said they had been once (down from 35% in 2003-04), 26% had been twice, 33% had been three or four times (up from 21%), and 16% visited five or more times. The average number of visits was 3.3.

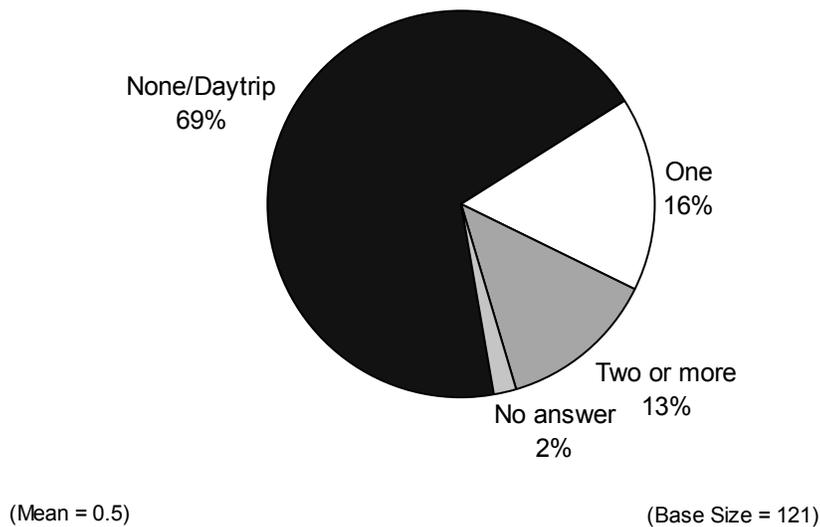
**FIGURE 51**  
**Primary Purpose Of Most Recent Trip To Primm**  
(Among Those Who Took A Non-Business  
Trip To Primm In The Past 12 Months)



We asked residents who had taken a non-business trip to Primm in the past 12 months what was the primary purpose of their most recent trip to Primm (Figure 51). Thirty-one percent (31%) said they visited Primm primarily to shop there, while 26% said they visited for vacation or pleasure (down from 38%). One in six (17%) said they visited Primm primarily to gamble, while 10% said they were attending a special event, 9% were just passing through, and 4% said they were visiting friends or relatives.

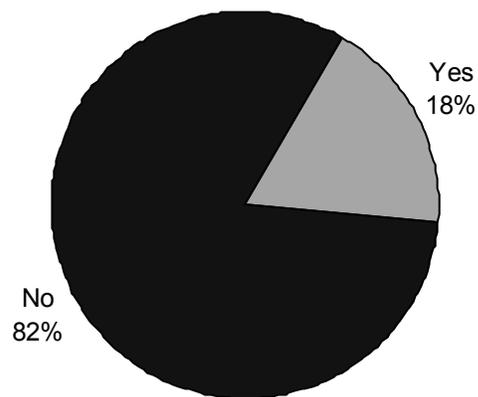
Men were more likely than women to say they were visiting Primm for vacation or pleasure (37% vs. 16%), while women were more likely than men to say they were visiting Primm primarily to shop (46% vs. 17%).

FIGURE 52  
Number Of Nights Stayed In Primm On Most Recent Trip  
(Among Those Who Took A Non-Business  
Trip To Primm In The Past 12 Months)



Respondents were asked how many nights they stayed in Primm on their most recent non-business trip there in the past year. Nearly seven in ten (69%) said they did not spend any nights in Primm, but 16% said they spent one night, and 13% spent two or more nights. The average number of nights stayed for all respondents was 0.5, while the average number of nights stayed excluding those on daytrips was 1.6 (Figure 52).

FIGURE 53  
Percentage Of Residents Who Have Taken  
A Non-Business Trip To Boulder City During The Past Year  
(Among Non-Residents Of Boulder City)



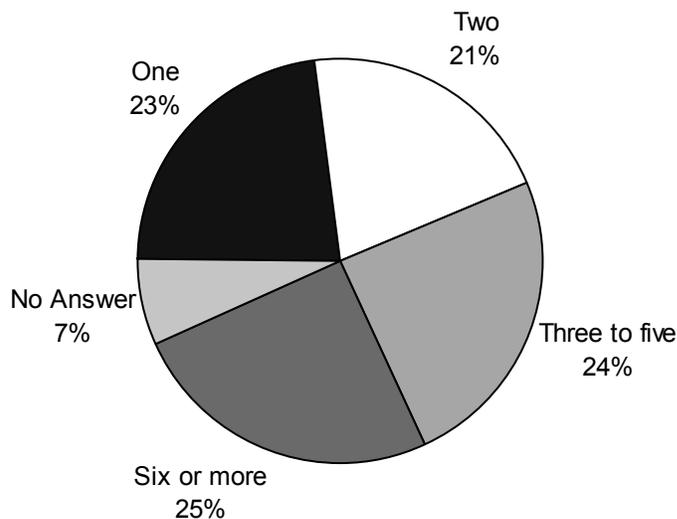
(Base Size = 1184)

We asked residents if they had taken a trip to Boulder City within the past 12 months for purposes other than work or personal business<sup>1</sup>. Eighteen percent (18%) said they had (Figure 53).

Residents who live in the Henderson area (34%) were significantly more likely than those who live in Las Vegas (16%) or elsewhere in the greater Las Vegas area (17%) to say they visited Boulder City in the past 12 months. Those who earn \$50,000 or more were also more likely to have visited Boulder City than those who earn less (22% vs. 13%), as were those who typically budget \$50 or more for gambling per day compared to those who budget less (25% vs. 15%).

<sup>1</sup> Excluding the 16 respondents – 1% – who identified themselves as residents of Boulder City.

**FIGURE 54**  
Number Of Times Visited Boulder City During The Past Year  
(Among Those Who Took A Non-Business  
Trip To Boulder City In The Past 12 Months)

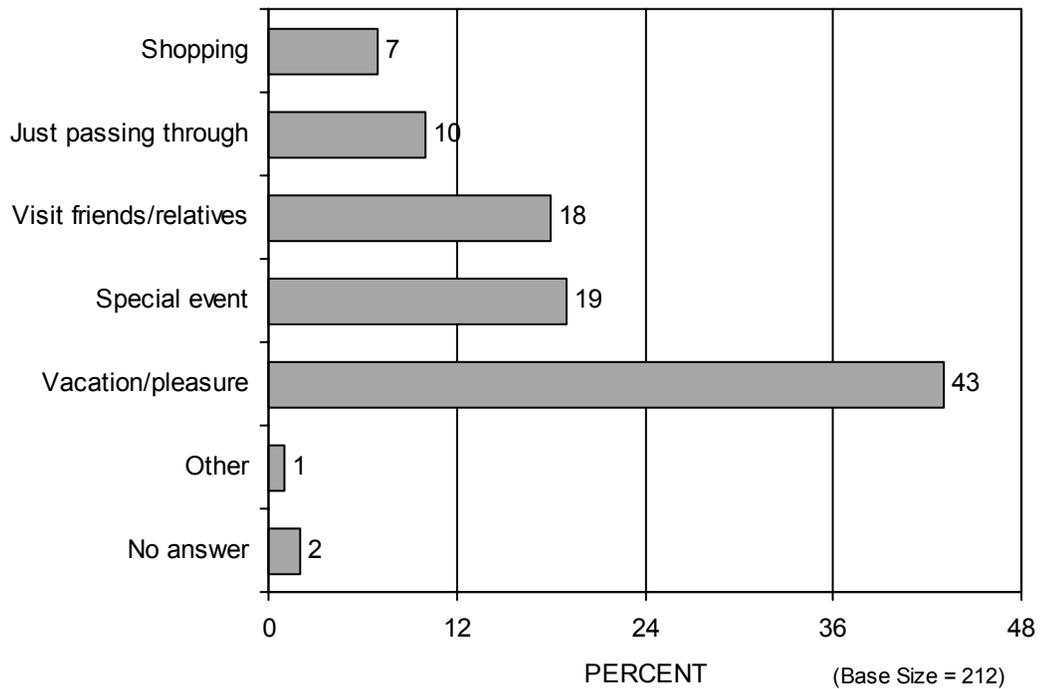


(Mean = 5.3)

(Base Size = 212)

We asked residents how many times they had visited Boulder City during the past year for purposes other than work or personal business (Figure 54). Twenty-three percent (23%) said they had been once, 21% had been twice, 24% had been three to five times, and 25% had been six or more times. The average number of visits to Boulder City in the past 12 months was 5.3.

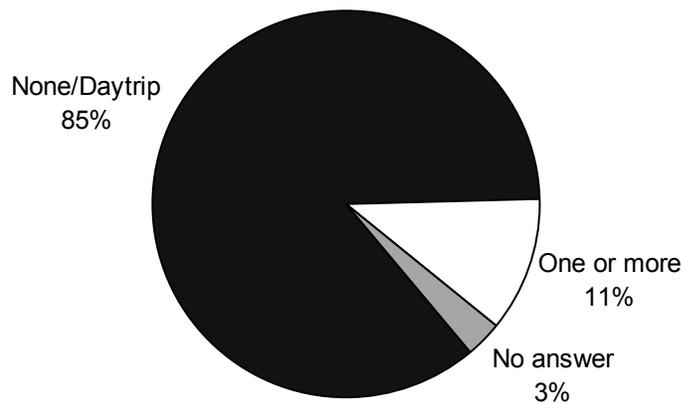
**FIGURE 55**  
Primary Purpose Of Most Recent Trip To Boulder City  
(Among Those Who Took A Non-Business  
Trip To Boulder City In The Past 12 Months)



We asked residents who had taken a non-business trip to Boulder City in the past 12 months what was the primary purpose of their most recent trip there (Figure 55). Forty-three percent (43%) said it was for vacation or pleasure, while 19% said they were attending a special event, 18% were visiting friends or relatives, 10% were just passing through, and 7% were visiting primarily to shop.

Men were more likely than women to say they were visiting Boulder City for vacation or pleasure (50% vs. 35%), while women were more likely than men to say they were visiting friends or relatives (24% vs. 13%).

FIGURE 56  
Number Of Nights Stayed In Boulder City On Most Recent Trip  
(Among Those Who Took A Non-Business  
Trip To Boulder City In The Past 12 Months)



(Mean = 0.3)

(Base Size = 212)

Respondents were asked how many nights they stayed in Boulder City on their most recent non-business trip there in the past year. More than eight in ten (85%) said they did not spend any nights in Boulder City, but 11% said they spent one or more nights. The average number of nights stayed for all respondents was 0.3, while the average number of nights stayed excluding those on daytrips was 2.3 (Figure 56).

# APPENDIX

*Questionnaire With  
Aggregate Results*

Respondent ID# \_\_\_\_\_

GENDER

MALE .....49%  
FEMALE.....51

**RESPONDENT ID NUMBERS  
SHOULD START WITH "001"  
AND END WITH "300"**

**SUPERVISOR:  
MALE/FEMALE QUOTA**

**NO LESS THAN 48% MALE**

**NO MORE THAN 52% FEMALE**

Time Started \_\_\_\_\_  
Time Ended \_\_\_\_\_  
Interview Length \_\_\_\_\_  
Interviewer \_\_\_\_\_  
Date \_\_\_\_\_  
Rep & page # \_\_\_\_\_

Hello. I'm \_\_\_\_\_ from GLS Research, a national marketing research firm. We are conducting a survey among Las Vegas area residents and would like to ask you a few questions about travel and leisure activities. All answers are kept strictly confidential.

1. We are supposed to interview people who are 21 years old or older. Are you 21 years old or older?

YES	<b>ASK Q2</b>
NO NOT SURE/DK REFUSED/NA	<b>ASK TO SPEAK TO SOMEONE IN THE HOUSE- HOLD WHO IS 21 OR OLDER</b>

3. What is your ZIP code, please?

890XX .....30%  
891XX .....70

**ALL ZIPS MUST BEGIN WITH  
890- OR 891-.**

**IF RESPONDENT GIVES A ZIP CODE THAT DOES  
NOT BEGIN WITH 890- OR 891-, TERMINATE.  
IF RESPONDENT IS NOT SURE OR REFUSES,  
TERMINATE.**

2. Do you live year-round in Clark County, Nevada (that is, the Las Vegas area)?

YES	<b>ASK Q3</b>
NO NOT SURE/DK REFUSED/NA	<b>TERMINATE</b>

4. What activities do you take part in during your leisure time over the course of a year? I'm interested in activities *outside your home* which you can do *in and around Las Vegas*. **(DO NOT READ LIST. ACCEPT UP TO 5 RESPONSES. PROBE:)** Any others?
5. Which of the activities you just mentioned do you do most often? **(IF NECESSARY, READ "YES" RESPONSES BACK TO RESPONDENT TO REFRESH HIS/HER MEMORY.)**
6. Which of the activities you just mentioned is your favorite? **(AGAIN, IF NECESSARY, READ "YES" RESPONSES BACK TO RESPONDENT TO REFRESH HIS/HER MEMORY.)**

	Q4		Q5	Q6	
	YES	NO	MOST OFTEN	FAVORITE	
a. BASKETBALL .....	2%	98%	1%	1%	BASKETBALL
b. BASEBALL (SOFTBALL) .....	3	97	1	1	BASEBALL
c. BINGO.....	2	98	1	1	BINGO
d. BOATING .....	5	95	1	2	BOATING
e. BOWLING .....	6	94	2	2	BOWLING
f. CAMPING .....	8	92	3	4	CAMPING
g. COMMUNITY ACTIVITIES (CHURCH, LITTLE LEAGUE, ETC.) .....	6	94	4	4	COMMUNITY ACTIVITIES
h. CYCLING .....	5	95	2	2	CYCLING
i. FISHING.....	6	94	2	3	FISHING
j. FOOTBALL (INCLUDE TOUCH/TAG) ...	2	98	1	1	FOOTBALL
k. EATING OUT .....	18	82	10	7	EATING OUT
l. GAMBLING .....	19	81	9	8	GAMBLING
m. GOLF .....	10	90	6	6	GOLF
n. HIKING.....	16	84	7	7	HIKING
o. HORSEBACK RIDING .....	1	99	1	1	HORSE RIDING
p. HUNTING.....	2	98	0	0	HUNTING
q. MOVIES .....	20	80	6	7	MOVIES
r. NIGHT CLUBBING.....	4	96	2	2	NIGHT CLUBS
s. PICNICS.....	4	96	2	2	PICNICS
t. SHOPPING .....	10	90	4	4	SHOPPING
u. SHOWS.....	16	84	3	4	SHOWS
v. SIGHT SEEING.....	9	91	3	4	SIGHT SEEING
w. SNOW SKIING.....	2	98	0	1	SNOW SKIING
x. SPORTING EVENTS .....	6	94	2	3	SPORTING EVENTS
y. SUNBATHING.....	1	99	0	0	SUNBATHING
z. SWIMMING .....	8	92	3	2	SWIMMING
aa. TENNIS.....	2	98	1	1	TENNIS
bb. VISITING FRIENDS OR RELATIVES ....	6	94	2	3	VISITING FRIENDS
cc. WATER SKIING.....	1	99	0	0	WATER SKIING
dd. WORKING OUT .....	6	94	4	3	WORKING OUT
ee. OTHER.....	1	99	6	5	OTHER
ff. NOT SURE/NO ANSWER.....	9	91	13	13	NS/NA

7. About how many dinners do you eat out every month? **(FILL IN BLANKS.)**

- 7.07 MEAN (INCLUDING 0)
- 7.45 MEAN (EXCLUDING 0)
- 5.00 MEDIAN (INCLUDING & EXCLUDING 0)

**IF "NONE" ("00"), SKIP TO Q9**

8. Of the dinners you eat out, about what percentage would you say you eat in hotel or motel restaurants? (N=1140)

- 25.07 MEAN (INCLUDING 0%)
- 35.90 MEAN (EXCLUDING 0%)
- 5.00 MEDIAN (INCLUDING 0%)
- 20.00 MEDIAN (EXCLUDING 0%)

9. Do you ever stay overnight in local hotels or motels in Las Vegas?

YES ..... 23%	<b>ASK Q10</b>
NO ..... 77	
NOT SURE/DK..... 0	<b>SKIP TO Q11</b>
REFUSED/NA ..... 0	

10. How many times in the past 12 months have you stayed overnight in local hotels or motels in Las Vegas? (N=275)

- 0 ..... 16%
- 1 ..... 22
- 2 ..... 19
- 3-4 ..... 20
- 5 OR MORE ..... 23
- 3.52 MEAN (INCLUDING 0)
- 4.17 MEAN (EXCLUDING 0)
- 2.00 MEDIAN (INCLUDING 0)
- 3.00 MEDIAN (EXCLUDING 0)

11. In the past 12 months have you attended any of the following sporting events?

- a. Las Vegas 51's baseball game..... 14%
- b. Auto race at the Las Vegas Motor Speedway..... 16
- c. University of Nevada Las Vegas football game..... 12
- d. University of Nevada Las Vegas basketball game ..... 10
- f. Any other UNLV sporting event excluding football and basketball games ..... 6
- e. A special sporting event held in Las Vegas such as a title boxing match, the National Finals Rodeo, a professional golf tournament, or the Las Vegas Bowl football game... 24
- g. Las Vegas Wranglers hockey game ..... 10

12. Are you a resident of... **(READ LIST. RESPONDENT MAY SAY "NO" TO ALL BUT MAY ONLY SAY "YES" TO ONE.)**

- a. Mesquite ..... 2%
- b. Laughlin ..... 1
- c. Jean ..... \*
- d. Primm ..... \*
- e. Boulder City ..... 1
- None of the above ..... 96

\* - less than 1%

13. Within the past 12 months, have you taken a trip for purposes other than work or personal business to any of the following towns?

**SEE Q12!  
IF RESPONDENT IS A RESIDENT OF THE TOWN, OMIT THAT TOWN'S NAME FROM THE LIST.**

- a. Mesquite ..... 19% (N=1176)
- b. Laughlin ..... 13 (N=1194)
- c. Jean ..... 4 (N=1199)
- d. Primm ..... 10 (N=1198)
- e. Boulder City ..... 18 (N=1184)

**IF "NO" OR "NOT SURE/NA" TO ALL IN Q13, SKIP TO Q29 ON PAGE 6**

**IF "YES" TO "MESQUITE" IN Q13A, ASK Q14 THROUGH Q16.**

14. How many times have you visited Mesquite for purposes other than work or personal business in the past 12 months? (N=219)

2.97 MEAN  
2.00 MEDIAN

15. Thinking of the LAST trip you took to Mesquite for purposes other than work or personal business — what was the PRIMARY purpose of that trip?

(N=219)

VACATION/PLEASURE.....	60%
TO GAMBLE .....	5
VISIT FRIENDS/RELATIVES.....	8
TO ATTEND A SPECIAL EVENT (E.G., GOLF, RODEO, FESTIVAL, ETC.).....	7
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT .....	1
JUST PASSING THROUGH .....	6
TO PLAY GOLF .....	8
TO VISIT A SPA.....	4
SOME OTHER REASON .....	0
NOT SURE/DK.....	2
REFUSED/NA .....	0

16. Again, thinking of your last trip to Mesquite for purposes other than work or personal business — how many nights did you stay? (N=219)

1.51 MEAN (INCLUDING 0)  
2.10 MEAN (EXCLUDING 0)  
1.00 MEDIAN (INCLUDING 0)  
2.00 MEDIAN (EXCLUDING 0)

**IF "YES" TO "LAUGHLIN" IN Q13B, ASK Q17 THROUGH Q19.**

17. How many times have you visited Laughlin for purposes other than work or personal business in the past 12 months? (N=156)

2.16 MEAN  
2.00 MEDIAN

18. Thinking of the LAST trip you took to Laughlin for purposes other than work or personal business — what was the PRIMARY purpose of that trip?

(N=156)

VACATION/PLEASURE.....	54%
TO GAMBLE .....	12
VISIT FRIENDS/RELATIVES.....	12
TO ATTEND A SPECIAL EVENT (E.G., GOLF, RODEO, FESTIVAL, ETC.).....	8
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT .....	0
JUST PASSING THROUGH .....	4
WATER-BASED RECREATION (FOR EXAMPLE, JET SKIING, WATER SKIING, BOATING, ETC.).....	8
SOME OTHER REASON.....	1
NOT SURE/DK.....	1
REFUSED/NA .....	0

19. Again, thinking of your last trip to Laughlin for purposes other than work or personal business — how many nights did you stay? (N=156)

1.97 MEAN (INCLUDING 0)  
2.36 MEAN (EXCLUDING 0)  
2.00 MEDIAN (INCLUDING & EXCLUDING 0)

**IF "YES" TO "JEAN" IN Q13C,  
ASK Q20 THROUGH Q22.**

20. How many times have you visited Jean for purposes other than work or personal business in the past 12 months?  
(N=52)

3.52 MEAN  
2.00 MEDIAN

21. Thinking of the LAST trip you took to Jean for purposes other than work or personal business — what was the PRIMARY purpose of that trip?

(N=52)

VACATION/PLEASURE.....	40%
TO GAMBLE .....	8
VISIT FRIENDS/RELATIVES.....	4
TO ATTEND A SPECIAL EVENT (E.G., GOLF, RODEO, FESTIVAL, ETC.).....	10
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT .....	0
JUST PASSING THROUGH .....	31
SOME OTHER REASON .....	4
NOT SURE/DK.....	2
REFUSED/NA .....	2

22. Again, thinking of your last trip to Jean for purposes other than work or personal business — how many nights did you stay?  
(N=52)

0.40 MEAN (INCLUDING 0)  
1.90 MEAN (EXCLUDING 0)  
0.00 MEDIAN (INCLUDING 0)  
1.50 MEDIAN (EXCLUDING 0)

**IF "YES" TO "PRIMM" IN Q13D,  
ASK Q23 THROUGH Q25.**

23. How many times have you visited Primm for purposes other than work or personal business in the past 12 months?  
(N=121)

3.34 MEAN  
3.00 MEDIAN

24. Thinking of the LAST trip you took to Primm for purposes other than work or personal business — what was the PRIMARY purpose of that trip?

(N=121)

VACATION/PLEASURE.....	26%
TO GAMBLE .....	17
VISIT FRIENDS/RELATIVES.....	4
TO ATTEND A SPECIAL EVENT (E.G., GOLF, RODEO, FESTIVAL, ETC.).....	10
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT .....	0
JUST PASSING THROUGH .....	9
SHOPPING .....	31
SOME OTHER REASON .....	0
NOT SURE/DK.....	2
REFUSED/NA .....	1

25. Again, thinking of your last trip to Primm for purposes other than work or personal business — how many nights did you stay?  
(N=121)

0.48 MEAN (INCLUDING 0)  
1.58 MEAN (EXCLUDING 0)  
0.00 MEDIAN (INCLUDING 0)  
1.00 MEDIAN (EXCLUDING 0)

**IF "YES" TO "BOULDER CITY" IN Q13E,  
ASK Q26 THROUGH Q28.**

26. How many times have you visited Boulder City for purposes other than work or personal business in the past 12 months?  
(N=212)

5.34 MEAN  
3.00 MEDIAN

27. Thinking of the LAST trip you took to Boulder City for purposes other than work or personal business — what was the PRIMARY purpose of that trip?

(N=212)

VACATION/PLEASURE.....	43%
TO GAMBLE .....	0
VISIT FRIENDS/RELATIVES.....	18
TO ATTEND A SPECIAL EVENT (E.G., GOLF, RODEO, FESTIVAL, ETC.).....	19
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT .....	0
JUST PASSING THROUGH .....	10
SHOPPING .....	7
SOME OTHER REASON .....	1
NOT SURE/DK.....	1
REFUSED/NA .....	1

28. Again, thinking of your last trip to Boulder City for purposes other than work or personal business — how many nights did you stay?

(N=212)

0.26 MEAN (INCLUDING 0)  
2.25 MEAN (EXCLUDING 0)  
0.00 MEDIAN (INCLUDING 0)  
2.00 MEDIAN (EXCLUDING 0)

29. I'd like to ask you a few questions about legalized gambling. By *legalized gambling* I mean all games of chance, including bingo, sports book, slot machines, and video gambling games, as well as casino-type games. I'm interested in all the legalized gambling you may do, whether it's at a casino or at some other public location — for instance, a convenience store, restaurant, or gas station. **(INTERVIEWER: IF RESPONDENT ASKS IF GAMBLING INCLUDES PRIVATE CARD PARTIES IN PEOPLE'S HOMES WHERE BETTING OCCURS, SAY "NO.")**

First, do you gamble even occasionally?

YES .....	67%	<b>SKIP TO Q31</b>
NO .....	33	<b>ASK Q30 THEN SKIP TO Q61 ON PAGE 11)</b>
REFUSED/NA .....	0	

30. People have many different reasons for choosing not to gamble. What is the PRIMARY reason you choose not to gamble? Any other reason? **(ACCEPT UP TO 2 RESPONSES.)**

(N=396)

PRIMARY REASON

NO MONEY/CAN'T AFFORD IT.....	42%
NO INTEREST/BORING.....	19
POOR ODDS/CAN NEVER WIN.....	16
RELIGIOUS/MORAL OBJECTIONS .....	13
FEAR ADDICTION.....	4
DON'T LIKE CASINOS/CROWDED/ DIRTY/NOISY .....	3
OTHER MENTIONS .....	2
REFUSED/NO ANSWER .....	1

COMBINED RESPONSES

NO MONEY/CAN'T AFFORD IT.....	56%
NO INTEREST/BORING.....	35
POOR ODDS/CAN NEVER WIN.....	21
RELIGIOUS/MORAL OBJECTIONS .....	17
DON'T LIKE CASINOS/CROWDED/ DIRTY/NOISY .....	7
FEAR ADDICTION.....	6
OTHER MENTIONS .....	3
NO 2 <sup>ND</sup> RESPONSE .....	53
REFUSED/NO ANSWER .....	1

**SKIP TO Q61  
ON PAGE 11**

31. Where do you do *MOST* of your gambling — on or near the "Strip," in Downtown Las Vegas, on the Boulder Strip, in the Green Valley area, in the Summerlin area, in North Las Vegas, in Henderson, at Lake Las Vegas, or elsewhere?

(N=804)

ON OR NEAR THE STRIP ..	19%	<b>SKIP TO Q33</b>
DOWNTOWN.....	4	<b>ASK Q32, THEN SKIP TO Q34</b>
BOULDER STRIP/ GREEN VALLEY.....	22	<b>ASK BOTH Q32 &amp; Q33</b>
SUMMERLIN AREA.....	16	
NORTH LAS VEGAS .....	11	
ELSEWHERE .....	14	
HENDERSON.....	9	
LAKE LAS VEGAS.....	1	
NOT SURE/DK .....	4	
REFUSED/NA.....	1	

32. Is there any particular reason why you do not go to the Strip to gamble? **(ACCEPT ONE RESPONSE.)**  
(N=653)
- TOO MANY TOURISTS/CROWDED ..... 34%
  - TOO FAR AWAY/INCONVENIENT ..... 21
  - HEAVY TRAFFIC/NO PARKING ..... 10
  - WORSE ODDS/LESS WINNINGS ..... 9
  - PREFER SMALLER/LOCAL GAMING ..... 6
  - DON'T GAMBLE MUCH ..... 5
  - JUST DON'T LIKE IT (N/S)..... 5
  - WORK ON THE STRIP/DON'T WANT TO GO THERE ..... 3
  - OTHER MENTIONS ..... 1
  - REFUSED/NO ANSWER..... 6

33. Is there any particular reason why you do not go to Downtown Las Vegas to gamble? **(ACCEPT ONE RESPONSE.)**  
(N=773)
- TOO FAR AWAY/INCOVENIENT ..... 23%
  - TOO MANY TOURISTS/CROWDED ..... 12
  - HIGH CRIME/SCARY AREA ..... 10
  - JUST DON'T LIKE IT (N/S)..... 8
  - HEAVY TRAFFIC/NO PARKING ..... 8
  - DON'T GAMBLE MUCH ..... 7
  - WORSE ODD/LESS WINNINGS..... 3
  - PREFER BIGGER/FLASHY GAMING..... 3
  - WORK DOWNTOWN/DON'T WANT TO GO THERE ..... 2
  - OTHER MENTIONS ..... 2
  - REFUSED/NO ANSWER..... 22

34. About how often do you gamble? Would you say it is... **(READ LIST. CIRCLE NUMBER AT FIRST "YES" RESPONSE.)**  
(N=804)

More than 5 times a week ..... 7%	<b>ASK Q35</b>
About twice a week ..... 20	<b>SKIP TO Q36</b>
About once a week ..... 19	
About twice a month ..... 20	<b>SKIP TO Q37</b>
About once a month..... 13	
About 4 times a year ..... 14	<b>SKIP TO Q38</b>
About twice a year ..... 5	
Once a year or less..... 3	
NOT SURE/DK..... 1	<b>SKIP TO Q39</b>
REFUSED/NA..... 0	

35. On average, about how much money do you personally budget on gambling per *DAY*. **(DO NOT ACCEPT A BUDGET AMOUNT OF ZERO DOLLARS.)**  
(N=59)

\$68.98 MEAN  
\$45.00 MEDIAN  
\$300.00 MAXIMUM

**SKIP TO Q39**

36. On average, about how much money do you personally budget on gambling per *WEEK*. **(DO NOT ACCEPT A BUDGET AMOUNT OF ZERO DOLLARS.)**  
(N=306)

\$105.06 MEAN  
\$50.00 MEDIAN  
\$2,000.00 MAXIMUM

**SKIP TO Q39**

37. On average, about how much money do you personally budget on gambling per *MONTH*. **(DO NOT ACCEPT A BUDGET AMOUNT OF ZERO DOLLARS.)**  
(N=261)

\$99.33 MEAN  
\$50.00 MEDIAN  
\$1,500.00 MAXIMUM

**SKIP TO Q39**

38. On average, about how much money do you personally budget on gambling per *YEAR*. **(DO NOT ACCEPT A BUDGET AMOUNT OF ZERO DOLLARS.)**  
(N=173)

\$232.44 MEAN  
\$100.00 MEDIAN  
\$3,200.00 MAXIMUM

39. Which type of gambling game do you play MOST OFTEN. (DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)

(N=804)

SLOT MACHINES.....37%	<b>ASK Q40</b>
VIDEO POKER .....29	
OTHER VIDEO MACHINES (21, KENO, ETC.).....1	<b>SKIP TO Q45</b>
BACCARAT.....0	<b>SKIP TO Q43</b>
BIG 6 .....0	
BINGO.....4	<b>SKIP TO Q45</b>
BLACKJACK .....8	<b>SKIP TO Q43</b>
CRAPS .....2	
KENO .....4	<b>SKIP TO Q45</b>
POKER.....6	
RACE/SPORTSBOOK.....4	
ROULETTE .....2	<b>SKIP TO Q43</b>
OTHER.....3	<b>SKIP TO Q45</b>
NOT SURE/DK.....1	
REFUSED/NA .....0	

40. Which denomination machine do you play MOST OFTEN. (DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)

(N=528)

NICKEL.....26%
DIME.....2
QUARTER.....46
HALF DOLLAR.....1
DOLLAR .....8
FIVE DOLLARS.....0
25 DOLLARS.....0
OTHER .....16
NOT SURE/DK.....2
REFUSED/NA .....1

**CONTINUE WITH Q41**

41. On the average, how many coins/credits do you usually bet for each play on a machine? (INTERVIEWER: IF RESPONDENT SAYS "MAXIMUM," ASK: "How many would that be on the average?")

(WRITE NUMBER IN BLANKS BELOW.)

(N=528)

9.76 MEAN  
5.00 MEDIAN  
97.00 MAXIMUM

**CONTINUE WITH Q42**

42. Do you USUALLY play the "progressive" machines — that is, the machines where the jackpot increases until someone wins it? (N=528)

YES.....37%  
NO .....59  
NOT SURE/DK.....4  
REFUSED/NA.....0

**SKIP TO Q45**

43. What table minimum do you play MOST OFTEN. (DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)

(N=96)

LESS THAN \$1.00 .....4%  
\$1.00 .....4  
\$2.00 .....5  
\$3.00 .....4  
\$5.00 .....51  
\$10.00 .....16  
\$25.00 .....10  
\$50.00 .....0  
OVER \$50.00 .....1  
OTHER.....0  
NOT SURE/DK.....3  
REFUSED/NA .....1

**CONTINUE WITH Q44**

44. What is your average bet? (WRITE AMOUNT IN BLANKS BELOW.)

(N=96)

\$16.73 MEAN  
\$10.00 MEDIAN  
\$120.00 MAXIMUM

45. The following questions are about gambling in the greater Las Vegas area. By "greater Las Vegas area" we mean the City of Las Vegas, its immediate suburbs, North Las Vegas, Boulder Highway, and Henderson. The "greater Las Vegas area" does *not* include outlying areas like Jean, Mesquite, Searchlight, or Laughlin.

Do you ever go to a casino in the greater Las Vegas area to gamble? (N=804)

YES .....71%	<b>ASK Q46</b>
NO .....29	<b>SKIP TO Q53</b>
NOT SURE/DK..... 1	
REFUSED/NA .....0	

46. About how often do you go to a casino in the greater Las Vegas area to gamble? Would you say it is... (N=569)

- More than 5 times a week ..... 5%
- About twice a week ..... 17
- About once a week..... 16
- About twice a month..... 18
- About once a month ..... 18
- About four times a year ..... 14
- About twice a year ..... 8
- Once a year or less ..... 4
- NOT SURE/DK..... 1
- REFUSED/NA ..... 0

47. What is the name of the casino where do you do MOST of your gambling? (N=569)

- BOULDER STRIP/GREEN VALLEY .....25%
- STRIP CORRIDOR/OFF-STRIP .....21
- NORTH LAS VEGAS .....17
- SUMMERLIN.....13
- HENDERSON .....10
- DOWNTOWN.....2
- OTHER.....6
- CAN'T NAME JUST ONE .....2
- DON'T KNOW/REFUSED.....4

48. Which of the following categories best describes your betting habits in the casinos? Are you a... (READ LIST.) (N=569)

- Very light bettor (1).....24%
  - Light bettor (2) .....46
  - Moderate bettor (3) .....23
  - Somewhat heavy bettor (4).....3
  - Heavy bettor (5) .....3
  - NOT SURE/DK.....2
  - REFUSED/NA .....0
- 2.12 MEAN

49. Do you maintain casino credit? (N=569)

- YES ..... 28%
- NO ..... 69
- NOT SURE/DK..... 3
- REFUSED/NA ..... 0

50. Are you a member of a casino slot club or players club? (N=569)

- YES ..... 73%
- NO ..... 27
- NOT SURE/DK ..... 0
- REFUSED/NA ..... 0

51. When you go to a casino to gamble, do you also usually eat at a casino restaurant or at a restaurant outside the casino?

CASINO RESTAURANT ..... 72%	<b>ASK Q52</b>
RESTAURANT OUTSIDE THE CASINO ..... 14	
DON'T EAT OUT (VOLUNTEERED)..... 12	(N=569)
NOT SURE/DK..... 2	
REFUSED/NA ..... 0	

**SKIP TO Q53**

52. When you go to a casino to gamble, what type of restaurant do you usually eat in? Is it a... **(READ LIST. IF RESPONDENT GIVES THE NAME OF A RESTAURANT, PROBE:) What TYPE of restaurant is that? (RECORD BOTH NAME AND TYPE OF RESTAURANT UNDER "OTHER".)**

(N=487)

- Fast food restaurant .....5%
- Buffet in a hotel, motel, or casino .....40
- Coffee shop in a hotel, motel, or casino .....25
- Coffee shop outside a hotel, motel, or casino .....3
- Gourmet restaurant .....24
- OTHER .....0
- NOT SURE/DK .....3
- REFUSED/NA .....0

53. Do you ever gamble in a convenience store, grocery store, or gas station in the greater Las Vegas area?

YES .....21%	<b>ASK Q54</b>
NO .....79	(N=804)
NOT SURE/DK .....0	<b>SKIP TO Q55</b>
REFUSED/NA .....0	

54. About how often do you gamble in a convenience store, grocery store, or gas station in the greater Las Vegas area? Would you say it is...

(N=172)

- More than 5 times a week .....5%
- About twice a week .....15
- About once a week .....12
- About twice a month .....15
- About once a month .....24
- About four times a year .....13
- About twice a year .....8
- Once a year or less .....6
- NOT SURE/DK .....1
- REFUSED/NA .....2

55. Do you ever gamble in a local bar or restaurant in the greater Las Vegas area?

YES .....25%	<b>ASK Q56</b>
NO .....75	(N=804)
NOT SURE/DK .....0	<b>SKIP TO Q57</b>
REFUSED/NA .....0	

56. About how often do you gamble in a local bar or restaurant in the greater Las Vegas area? Would you say it is... (N=204)

- More than 5 times a week .....3%
- About twice a week .....11
- About once a week .....14
- About twice a month .....11
- About once a month .....23
- About four times a year .....14
- About twice a year .....12
- Once a year or less .....12
- NOT SURE/DK .....1
- REFUSED/NA .....1

57. Do you ever gamble in Clark County OUTSIDE the greater Las Vegas area?

(N=804)

YES .....23%	<b>ASK Q58</b>
NO .....76	<b>SKIP TO Q60</b>
NOT SURE/DK .....1	
REFUSED/NA .....0	

58. About how often do you gamble outside the greater Las Vegas area? Would you say it is...

(N=182)

- More than 5 times a week .....3%
- About twice a week .....7
- About once a week .....7
- About twice a month .....7
- About once a month .....7
- About four times a year .....20
- About twice a year .....21
- Once a year or less .....25
- NOT SURE/DK .....1
- REFUSED/NA .....1

59. When you gamble outside the greater Las Vegas area, in which town or community do you gamble MOST OFTEN? (ACCEPT ONLY ONE RESPONSE.) (N=182)

JEAN.....	3%
MESQUITE .....	32
LAUGHLIN.....	25
PRIMM (STATE LINE).....	12
MORE THAN ONE PLACE MOST OFTEN .....	10
HENDERSON.....	6
OTHER .....	5
NOT SURE/DK .....	5
REFUSED/NA.....	2

60. Do you gamble only when you have out-of-town visitors or do you gamble at other times as well? (N=804)

ONLY WHEN HAVE OUT-OF-TOWN VISITORS .....	17%
OTHER TIMES.....	76
BOTH (VOL.).....	5
NOT SURE/DK.....	1
REFUSED/NA .....	1

61. (ASK OF ALL RESPONDENTS:)

Do you ever go to any of the shows which the casinos offer? This would include lounge acts as well as showrooms.

YES .....	63%	<b>ASK Q62</b>
NO .....	37	
NOT SURE/DK .....	0	<b>SKIP TO Q64</b>
REFUSED/NA.....	0	

62. About how often do you go to a casino show? Would you say it is... (READ LIST. CIRCLE NUMBER AT FIRST "YES" RESPONSE.)

(N=755)

Twice a week or more .....	0%
About once a week.....	2
About twice a month.....	6
About once a month .....	14
About four times a year .....	27
About twice a year.....	27
Once a year or less .....	23
NOT SURE/DK.....	1
REFUSED/NA .....	0

63. Which of the following kinds of shows have you been to? (READ FIRST 6 RESPONSES IN LIST. ACCEPT MULTIPLE RESPONSES.)

(N=755)

	<u>Q63</u>		
	<u>YES</u>	<u>NO</u>	<u>NA</u>
a. Headliner shows (big-name stars).....	71%	29%	0%
b. Large-scale Las Vegas style shows (e.g., Mystère!, Jubilee, O!, Blue Man Group, etc.) .....	69	31	0
e. Comedy or improv shows .....	52	48	0
f. Broadway style shows (e.g., Mama Mia, Avenue Q, Hairspray).....	46	54	0
c. Other small-scale shows or musical revues .....	50	50	0
d. Lounge acts (local bands).....	49	51	0

NONE OF THE ABOVE .....	2	98	<b>DO NOT READ</b>
NOT SURE/DON'T KNOW .....	0	100	
REFUSED/NO ANSWER.....	0	100	

64. Which of the following other leisure activities have you done at a casino-hotel within the past 12 months?

	<u>YES</u>	<u>NO</u>	<u>NS/ NA</u>
a. Watched a movie .....	65%	35%	0%
b. Visited a nightclub....	26	74	0
c. Attended a slot or other type of gaming tournament.....	8	92	0
d. Went shopping .....	49	51	0
e. Visited a spa .....	13	87	0
f. Went bowling .....	30	70	0
g. Went to a bar .....	40	60	0
h. Went to a barber shop or hair salon ....	14	86	0
i. OTHER (VOLUNTEERED) ...	15	84	1

64a. What is the name of the hotel-casino that you go to MOST OFTEN for leisure or entertainment OTHER THAN GAMBLING?

STRIP CORRIDOR/OFF-STRIP .....	33%
BOULDER STRIP/GREEN VALLEY .....	17
NORTH LAS VEGAS .....	12
SUMMERLIN.....	10
HENDERSON .....	6
DOWNTOWN.....	2
OTHER/CAN'T NAME JUST ONE .....	4
NONE.....	11
DON'T KNOW/REFUSED.....	5

65. Have you ever been to the Fremont Street Experience located in Downtown Las Vegas?

YES .....	85%	<b>ASK Q66</b>
NO .....	15	<b>SKIP TO Q68</b>
NOT SURE/DK.....	0	
REFUSED/NA .....	0	

66. How many times have you been to the Fremont Street Experience in the past 12 months?

	(N=1018)
NONE .....	28%
1.....	25
2.....	15
3-5 .....	19
6-10 .....	6
MORE THAN 10.....	4
REFUSED/NO ANSWER.....	2

<u>3.34</u>	MEAN (INCLUDING 0)
<u>4.70</u>	MEAN (EXCLUDING 0)
<u>1.00</u>	MEDIAN (INCLUDING 0)
<u>2.00</u>	MEDIAN (EXCLUDING 0)

**IF THE RESPONDENT HAS NOT BEEN TO THE FREMONT STREET EXPERIENCE DURING THE PAST YEAR, RECORD "000" IN THE BLANKS ABOVE AND SKIP TO Q68**

67. During any of your visits to the Fremont Street Experience in the past 12 months, did you...  
(N=707)

a. See the light show? .....	88%
b. Gamble? .....	36
c. Purchase something at a retail location? .....	32
d. See some type of entertainment at a lounge or showroom? .....	18
e. Eat at a restaurant? .....	58
f. See live street performers? .....	66
g. Attend a special event? .....	26

68. How many flights have you made out of McCarran International Airport (the Las Vegas airport) during the past 12 months?

NONE .....	36%
1-2 .....	28
3-5 .....	18
OVER 5 FLIGHTS .....	16
REFUSED/NO ANSWER.....	2

<u>3.87</u>	MEAN (INCLUDING 0)
<u>6.05</u>	MEAN (EXCLUDING 0)
<u>1.00</u>	MEDIAN (INCLUDING 0)
<u>3.00</u>	MEDIAN (EXCLUDING 0)

69. Over the past year, have you used the public bus system to travel in the Las Vegas area?

YES .....	12%	<b>ASK Q70</b>
NO .....	88	
NOT SURE/DK.....	0	<b>SKIP TO Q71</b>
REFUSED/NA .....	0	

70. Generally, were you satisfied with the public bus service provided? (N=147)

YES ..... 76%  
NO ..... 23  
NOT SURE/DK..... 1  
REFUSED/NA ..... 0

71. Over the past year, have you used the Las Vegas Monorail to travel in the Las Vegas Strip area?

YES .....	12%	<b>ASK Q72</b>
NO .....	88	
NOT SURE/DK.....	0	<b>SKIP TO Q73</b>
REFUSED/NA .....	0	

72. Generally, were you satisfied with the service provided by the Las Vegas Monorail? (N=140)

YES..... 83%  
NO ..... 17  
NOT SURE/DK ..... 0  
REFUSED/NA..... 0

Now I'd like to ask you some questions just for classification purposes. As I mentioned before, all your answers will be kept strictly confidential.

73. What is your employment situation? Are you... **(READ LIST.)**

Employed full time.....	46%	<b>ASK Q74 &amp; Q75</b>
Employed part time .....	6	
Self-employed .....	9	
Not employed for pay.....	9	<b>SKIP TO Q77 ON PAGE 15</b>
Retired.....	29	
Student.....	1	
REFUSED/NA .....	1	

74. What kind of work do you do?

75. What industry is that in?

(PROBE FOR JOB TITLE AND/OR LISTEN CAREFULLY TO JOB DESCRIPTION AND THE KIND OF COMPANY WORKED FOR. FILL IN THE BLANKS BELOW.)

**JOB DESCRIPTION/TITLE**

(N=721)

PROFESSIONAL/TECHNICAL .....	21%
MANAGERS/OFFICIALS/PROPRIETORS ..	13
SALES/CLERICAL WORKERS .....	18
CRAFT WORKERS/FOREMEN .....	7
SERVICE WORKERS/OPERATORS .....	31
LABORERS/AGRICULTURAL WORKERS....	4
OTHER.....	4
NOT SURE/DK .....	1
REFUSED/NA.....	1

**INDUSTRY**

(N=721)

MINING .....	2%
CONSTRUCTION .....	9
MANUFACTURING.....	2
TRANSPORTATION, COMMUNICATIONS, ELECTRIC, GAS, & SANITARY .....	7
WHOLESALE TRADE.....	3
RETAIL TRADE.....	8
FINANCE, INSURANCE, & REAL ESTATE .....	8
SERVICES .....	43
AGRICULTURE/FORESTRY.....	0
PUBLIC ADMINISTRATION .....	9
OTHER.....	5
NOT SURE/DK.....	2
REFUSED/NA .....	2

**INTERVIEWER: IF IT IS COMPLETELY CLEAR FROM THE PREVIOUS QUESTION THAT THE RESPONDENT WORKS FOR A CASINO OR CASINO/HOTEL, CIRCLE "1" ["YES"] IN THE NEXT QUESTION AND CONTINUE. OTHERWISE, ASK THE NEXT QUESTION.**

76. Do you work for any of the casinos or casino/hotels in Las Vegas?

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

77. What year did you move to Clark County, or were you born here? (IF "BORN HERE" ASK:) In what year were you born? (RECORD YEAR AND CIRCLE APPROPRIATE CATEGORY BELOW.)

1990.79 MEAN  
1995.00 MEDIAN

BORN HERE ..... 5%  
1960 OR BEFORE ..... 3  
1961 TO 1965 ..... 3  
1966 TO 1970 ..... 3  
1971 TO 1975 ..... 4  
1976 TO 1980 ..... 5  
1981 TO 1985 ..... 6  
1986 TO 1990 ..... 11  
1991 TO 1995 ..... 14  
1996 TO 2000 ..... 19  
2001 TO 2005 ..... 23  
2006 TO PRESENT ..... 2  
REFUSED/NA ..... 3

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

GRADE SCHOOL OR SOME HIGH SCHOOL ..... 5%  
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12)..... 25  
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) ..... 27  
GRADUATED COLLEGE ..... 25  
GRADUATE SCHOOL (MASTER'S OR PH.D.) ..... 15  
TECHNICAL, VOCATIONAL OR TRADE SCHOOL ..... 2  
REFUSED/NA ..... 1

79. What is your current marital status? Are you... (READ LIST)

Single ..... 21%  
Married ..... 55  
Separated or divorced ..... 13  
Widowed ..... 9  
REFUSED/NA ..... 1

80. Do you have any children of your own living at home with you who are... (READ LIST.)

Less than 13 years old ..... 23%  
13-18 years old ..... 11  
More than 18 years old ..... 13

81. Most people think of themselves as belonging to a particular ethnic or racial group. What ethnic or racial group are you a member of? (ASK ONLY IF NECESSARY: Are you white, Black or African American, Asian or Asian American, Hispanic or Latino — or of some other ethnic or racial background?)

WHITE ..... 78%  
BLACK/AFRICAN AMERICAN ..... 6  
ASIAN/ASIAN AMERICAN ..... 3  
HISPANIC/LATINO ..... 6  
NATIVE AMERICAN ..... 1  
MIXED RACE (VOL.) ..... 2  
OTHER ..... 0  
NOT SURE/NA ..... 4

**EDITORS!**  
ALL EUROPEAN AND MIDDLE EASTERN NATIONALITIES (FOR EXAMPLE, IRISH, ITALIAN, JEWISH, ARAB, ARMENIAN, TURKISH, ETC.) SHOULD BE CLASSIFIED AS "WHITE". ALL PACIFIC ISLANDERS (PHILIPPINES, HAWAII, SAMOA, FIJI, ETC.) SHOULD BE CLASSIFIED AS "ASIAN". THE "OTHER" CATEGORY SHOULD INCLUDE ONLY THOSE OF MIXED RACE (FOR EXAMPLE, BLACK AND HISPANIC, ASIAN AND BLACK, ETC.).

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

51.02 MEAN  
51.00 MEDIAN

**(IF RESPONDENT REFUSES TO STATE AGE, ASK:)**

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

21 to 29..... 10%  
30 to 39..... 17  
40 to 49..... 17  
50 to 59..... 20  
60 to 64..... 9  
65 and older ..... 23  
REFUSED/NA ..... 4

83. Please tell me which one of the following categories includes your total household income before taxes last year. Include your own income and that of any member of your immediate household who is living with you. Was it... **(READ LIST.)**

Less than \$10,000..... 3%  
\$10,000 to \$19,999 ..... 5  
\$20,000 to \$29,999 ..... 8  
\$30,000 to \$39,999 ..... 9  
\$40,000 to \$49,999 ..... 8  
\$50,000 to \$59,999 ..... 9  
\$60,000 to \$69,999 ..... 7  
\$70,000 to \$79,999 ..... 6  
\$80,000 to \$99,999 ..... 7  
\$100,000 to \$149,999 ..... 10  
\$150,000 or more ..... 7  
NOT SURE/DK..... 4  
REFUSED/NA ..... 16