

LAS VEGAS

Lessons Learned

KEVIN BAGGER

DIRECTOR OF INTERNET MARKETING & RESEARCH

APRIL 11, 2006



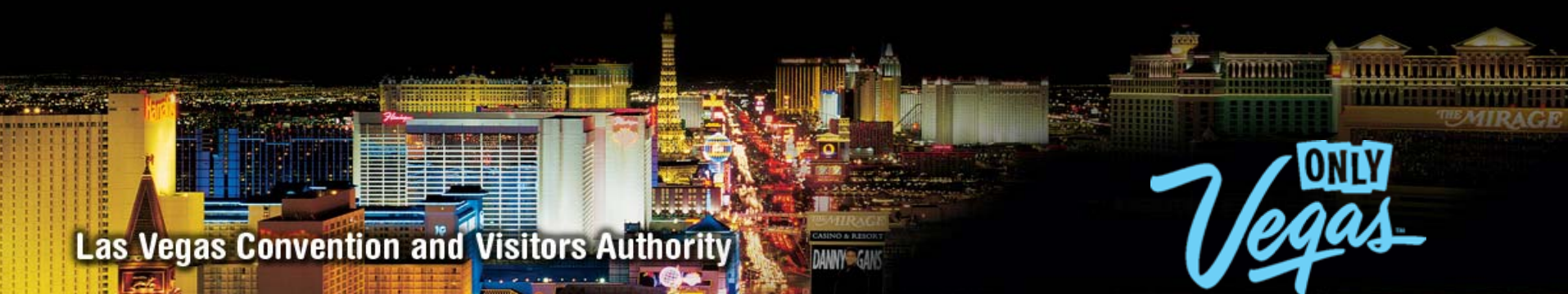
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Who is the LVCVA?

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The LVCVA

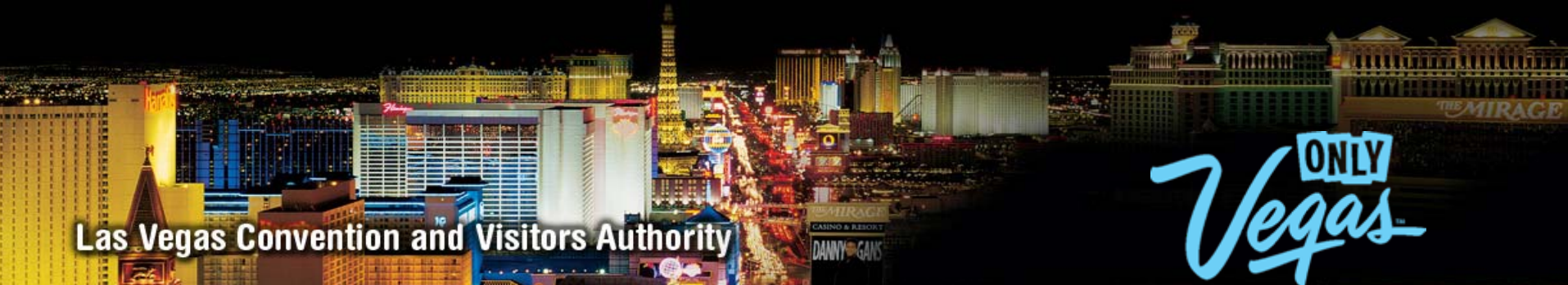
- Destination Marketing Organization
- Quasi-governmental entity
- 14-member board of directors
- Funded by room tax
- County-wide jurisdiction

LVCVA Mission Statement

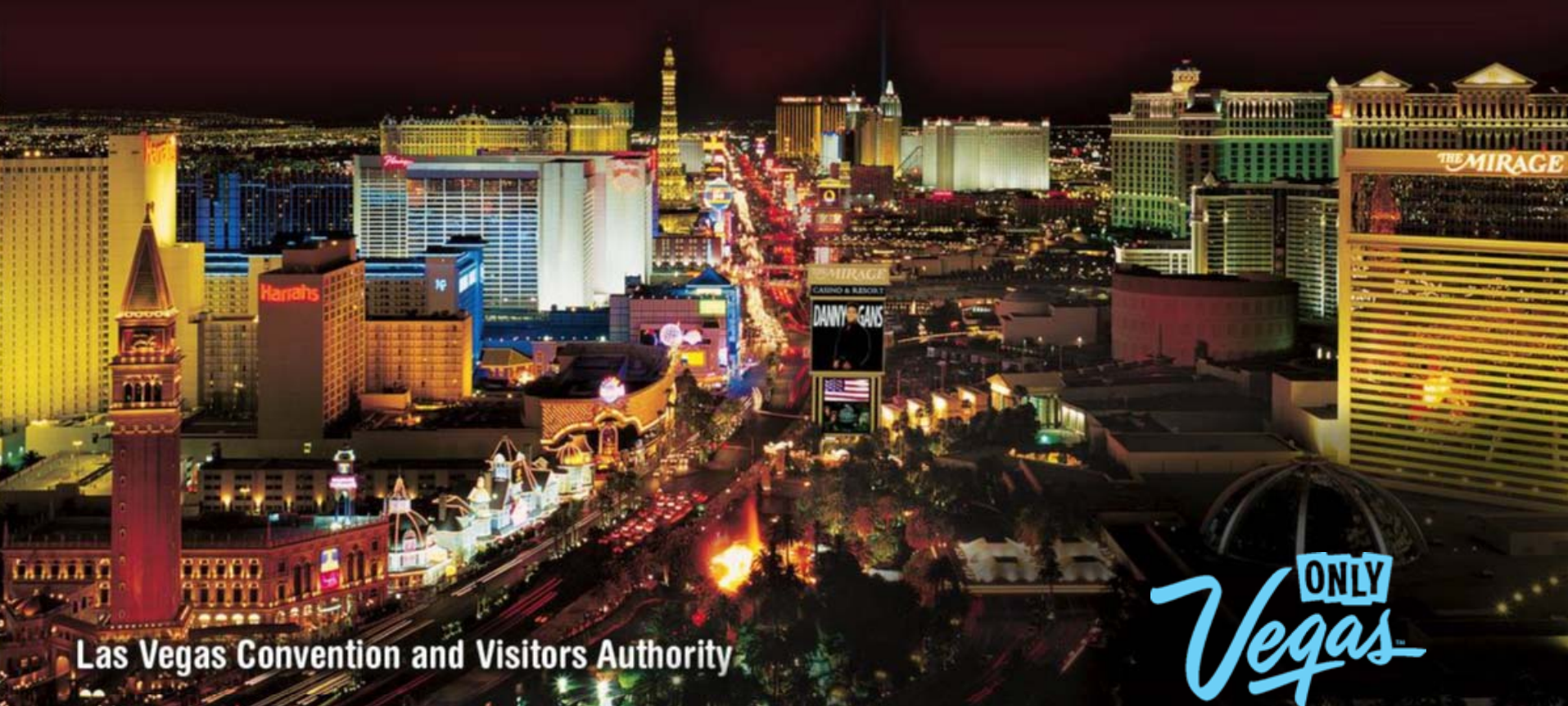
“To attract visitors by promoting
Las Vegas as the world’s
most desirable destination
for leisure and business travel.”

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Las Vegas *FACTS*



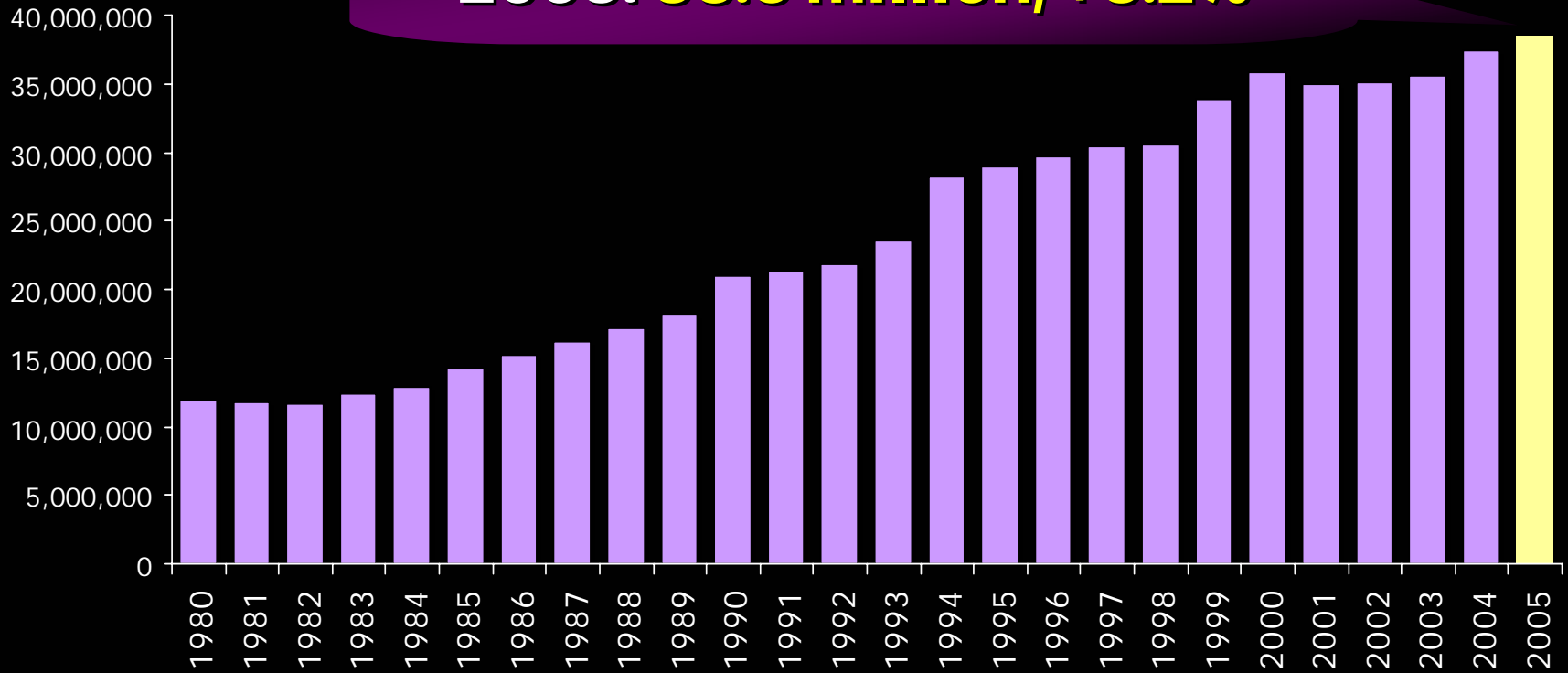
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Annual Visitor Volume

1980-2005

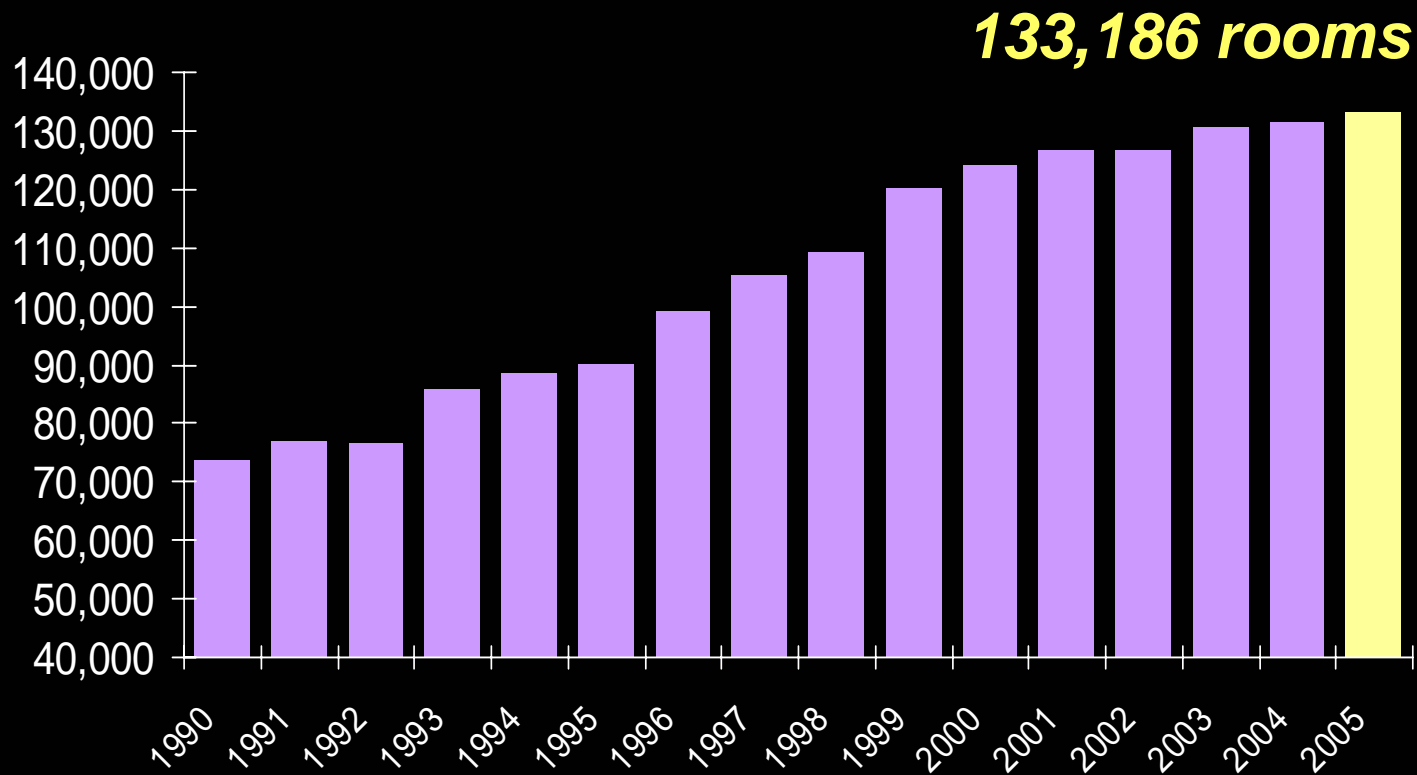
2005: 38.6 million, +3.2%



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Las Vegas Room Inventory



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Occupancy Comparison

Las Vegas 89.2%

Oahu 85.6%

New York City 82.9%

LA/Long Beach 74.6%

Miami 72.6%

San Francisco 71.5%

Orlando 70.7%

Top 25 Markets Avg. 68.7%

Sources: Smith Travel Research and LVCVA

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Product Evolution - Inventory

1955:

7,100 rms



2005:

+133,000 rms

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New Room Development, 2006-2010

Est. 170,000 Rooms By 2010

Red Rock Resort	850
Trump International Palazzo	1,282
Cosmopolitan	3,025
Encore at Wynn	2,700
Fontainebleau	1,500
Las Ramblas	4,000
W Las Vegas	4,400
Project CityCenter	3,000
Echelon Place	6,450
...and more	



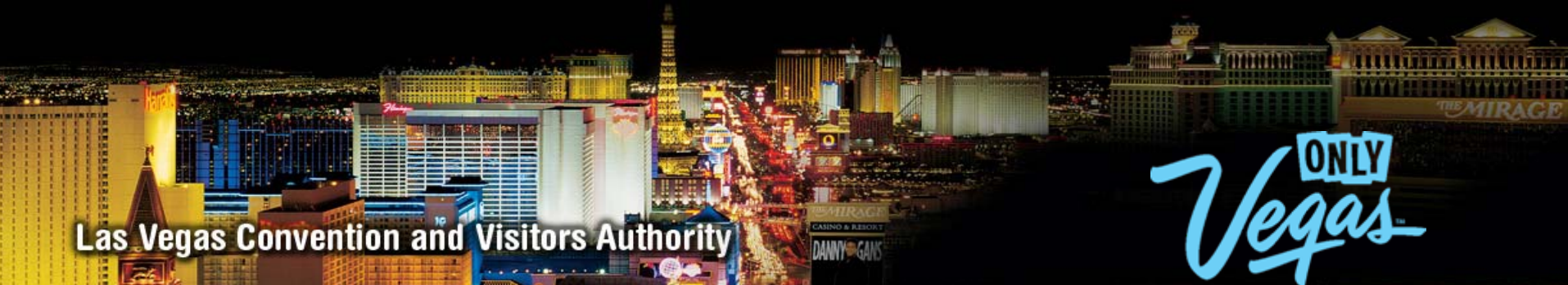
The Las Vegas Vision

43,000,000

Visitors by 2009

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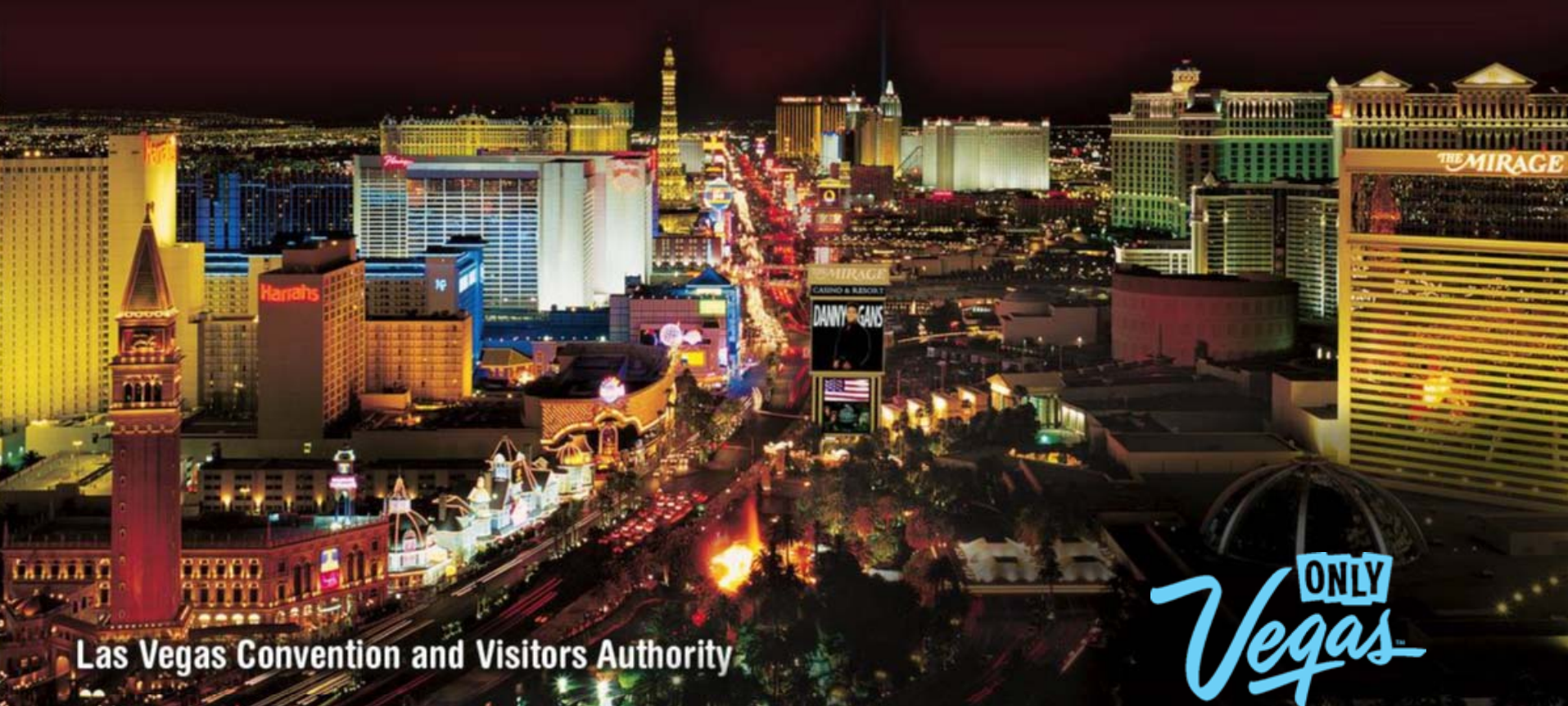
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The Challenge

To maintain occupancy rates...
... requires **200,000** additional
annual visitors for every **1,000** new
rooms added

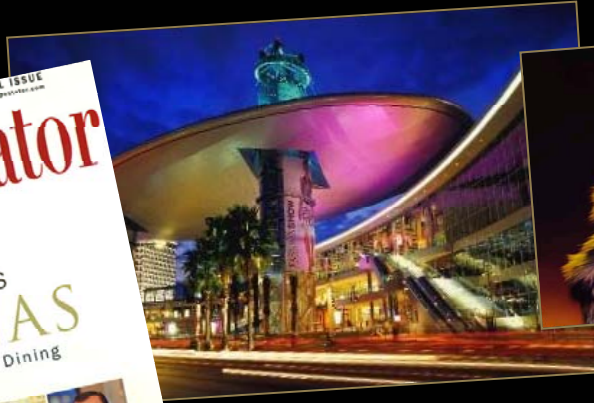
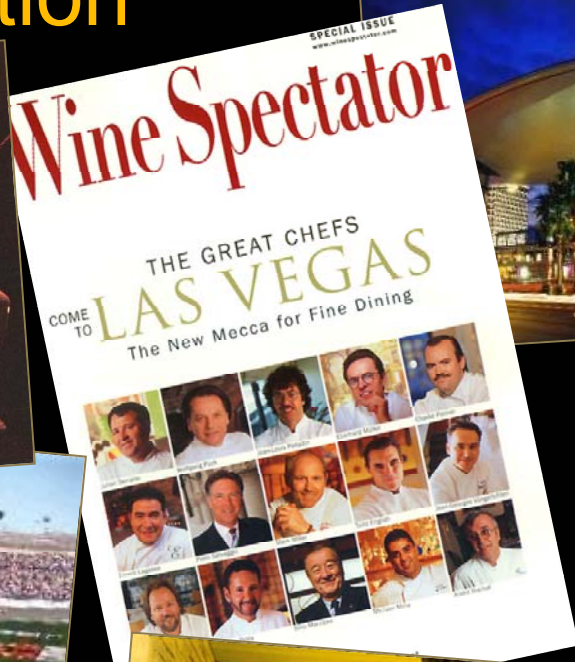
Evolution of Las Vegas *PRODUCT*



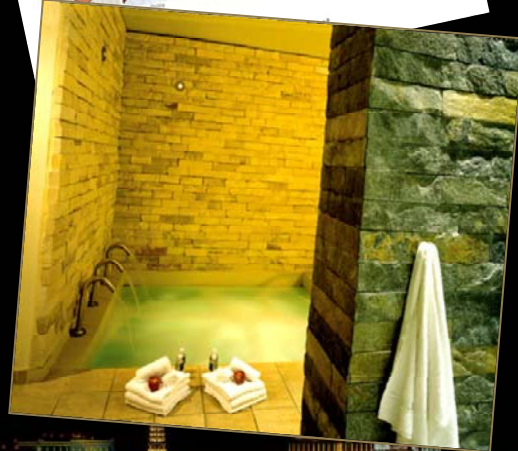
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Product Evolution



- Entertainment
- Dining
- Nightlife
- Golf
- Spas



MASTER PLAN ENHANCEMENT



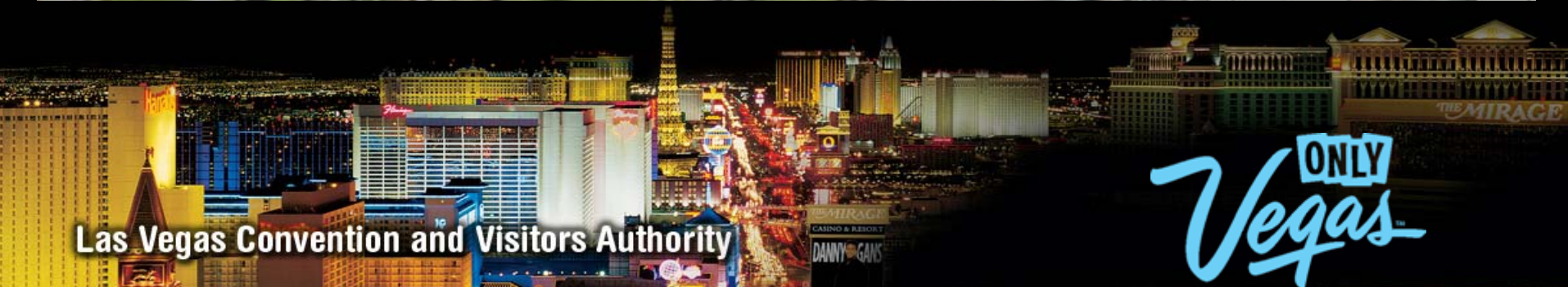
Las Vegas convention center

HOUSING the Brand: Las Vegas Conv Ctr

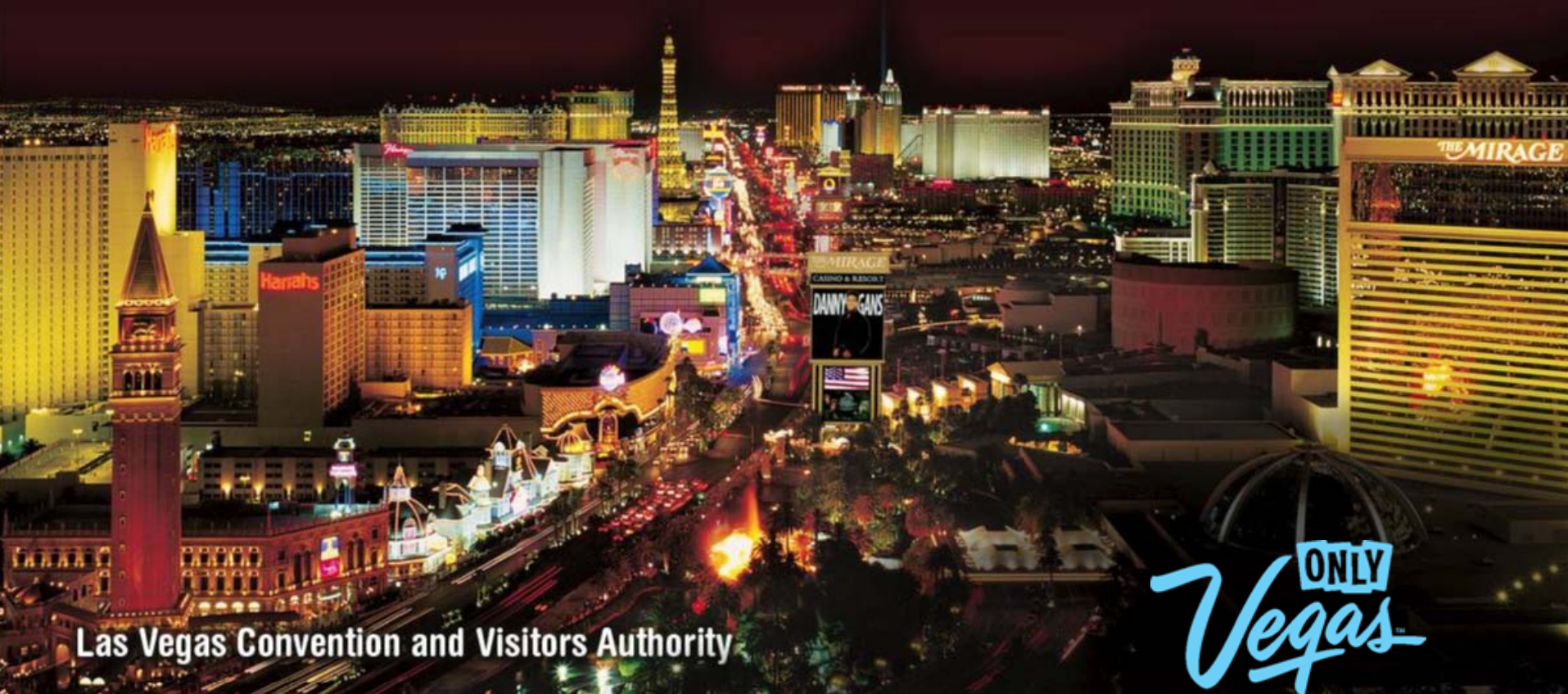


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Evolution of the Las Vegas *BRAND*



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Evolution of Marketing

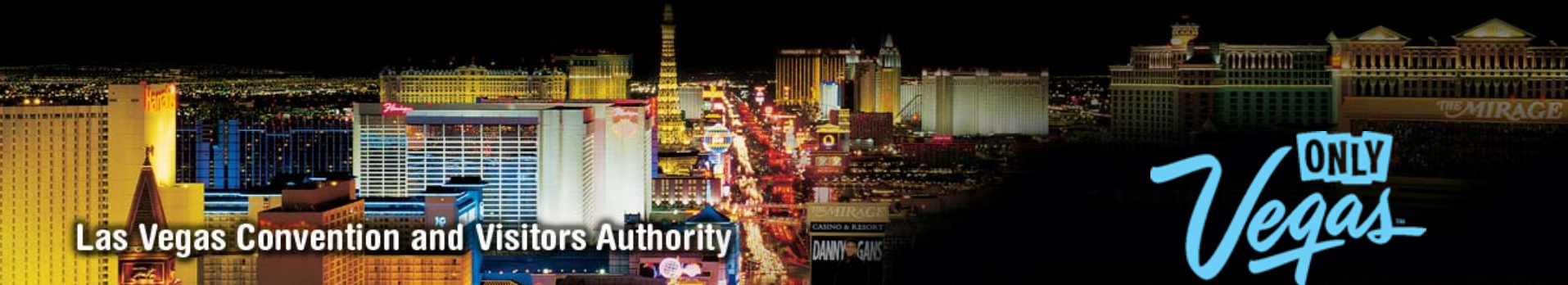
In The Beginning...

TV SPOT

*“Las Vegas!
Nobody Does It Better!”*

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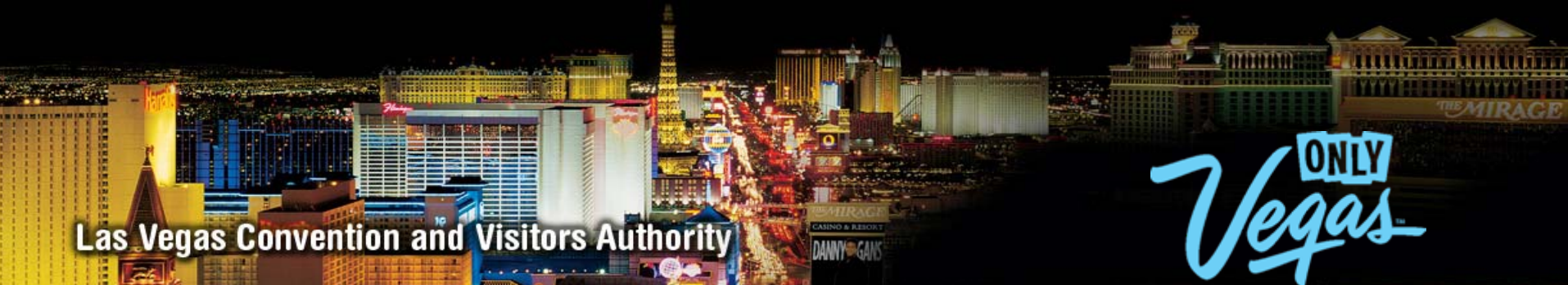


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The Product...

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PRODUCT TV SPOTS

“Rome”

“I’m Too Sexy”

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DEFINING THE BRAND

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Branding vs. Product Advertising

➤ Product approach

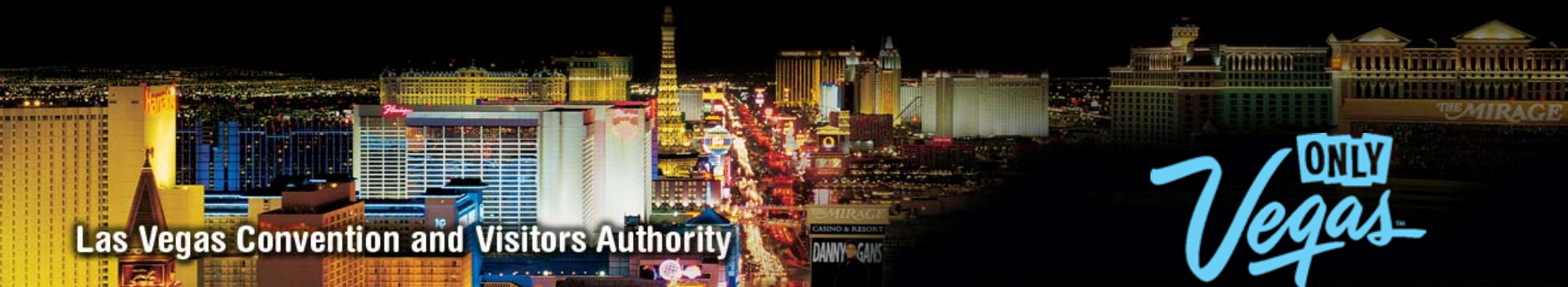
- Lists or catalogues the offering
- “Features” driven,
- Rational – tells people *what*

➤ Branding

- Touches nerves
- Makes a deeper, lasting emotional connection
- Creates loyalty

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Branding Done Right

- **Starbucks** – why do so many people pay over \$3 for a cup of coffee?
 - The coffee (product) is secondary to the experience – *a mental pit-stop from life*
- **Nike** – what exactly does “Just Do It” mean?
 - It’s a phrase – a challenge – defined and made personal by the consumer
- **Coca-Cola** – what do polar bears have to do with soda pop?
 - The Coke brand transcends the soda – *it’s a feeling*

DEFINING THE BRAND

THE RESEARCH

Thousands of interviews over 18 months

- Focus Groups
- Street Interviews
- In-home interviews
- Triads
- Telephone interviews

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DEFINING THE BRAND

THE LAS VEGAS PERSONALITY

- Exciting
- Sexy
- Experiences are to be collected
- Live your unexpressed life
- Safely dangerous
- Playfully mischievous
- Evocatively sensual
- Confidently defiant

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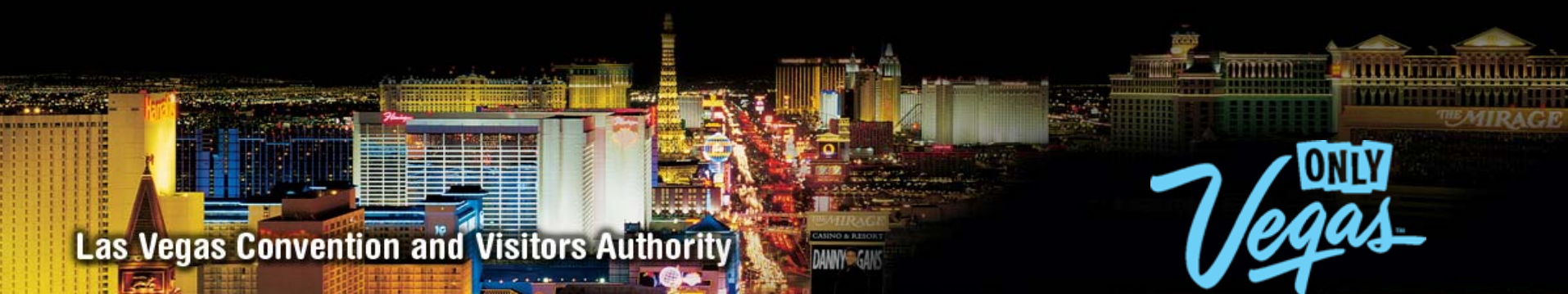
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The Freedom Campaign is Born...

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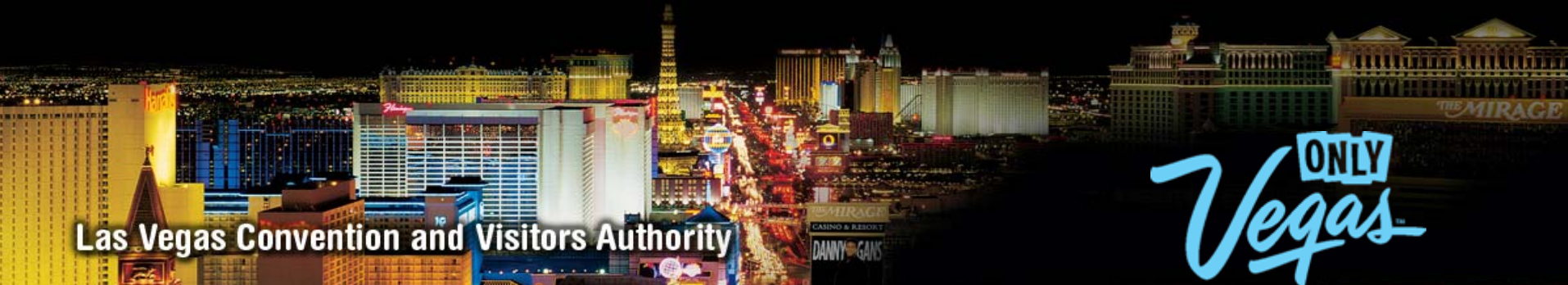
BRANDING TV SPOTS

“Mud Flap Girls”

“Parka-man”

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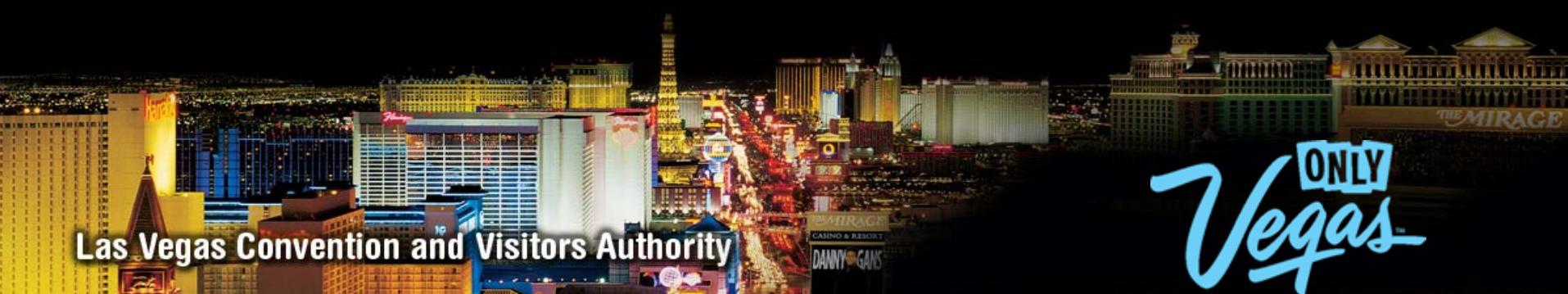


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September 11, 2001

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THE RESEARCH

Issue: ***Devise creative message following 9.11***

Action: *Unscripted interviews on the Strip*

400 in-market intercept surveys

1,800 phone surveys in near feeder markets

3 major nationwide studies

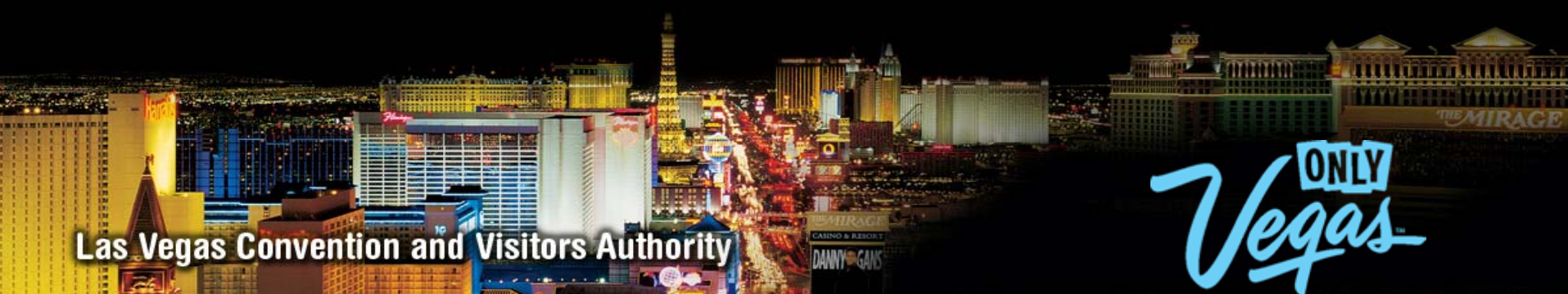
Findings: ***Las Vegas is safe.***

Las Vegas is an “escape.”

Give permission to travel.

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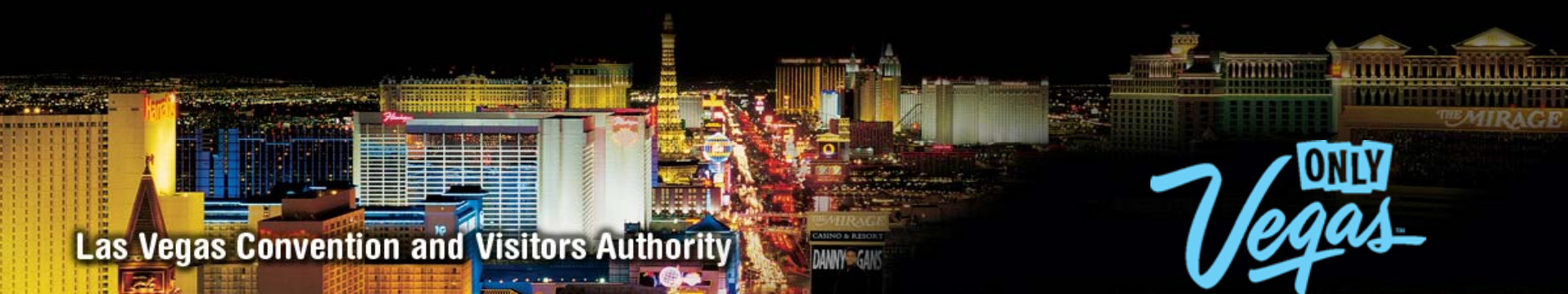
POST 9-11 TV SPOTS

“Frank Sinatra”

“It’s Time For You”

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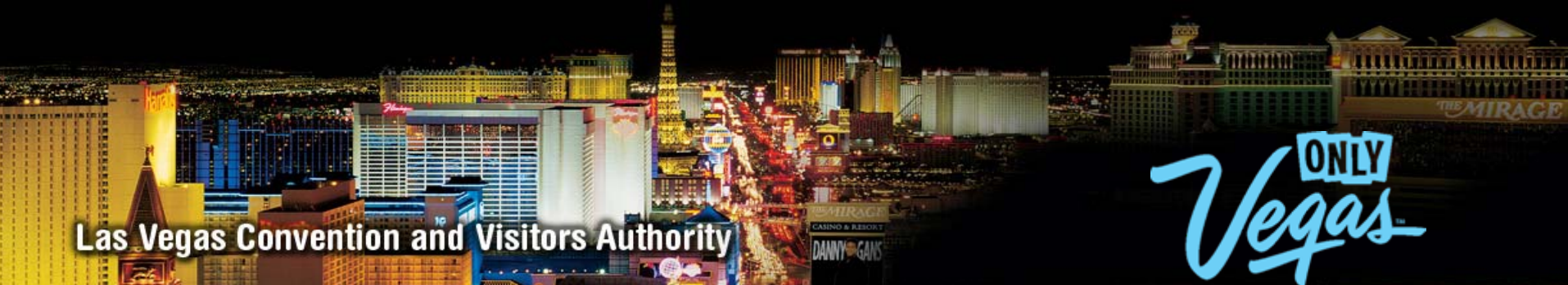


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Targeted Opportunities...

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OPPORTUNISTIC TV SPOT

“Brock Wilder”

“Red Carpet”

“Big Game”

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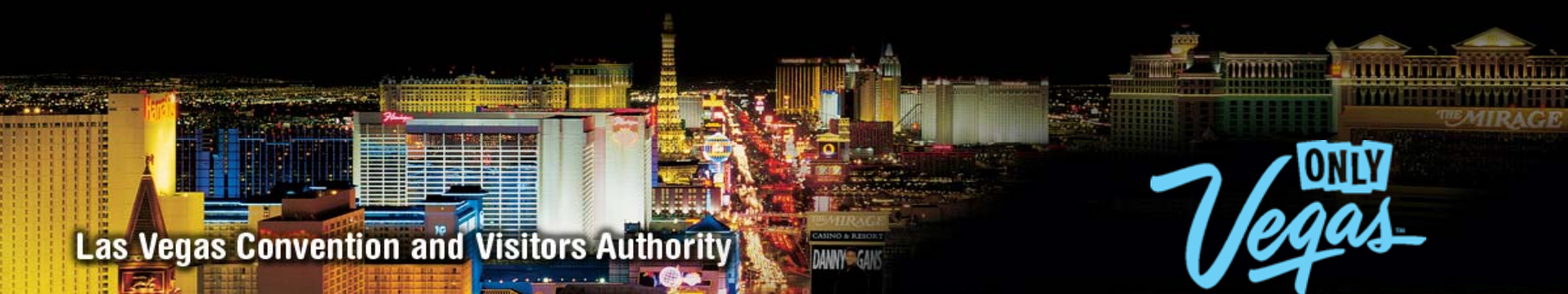
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What's Your Vegas Story...

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THE RESEARCH

- Concept Testing
- Focus Groups
- In-home web testing
- One-on-one interviews
- Ad awareness tracking

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TV SPOTS

Vegas Stories I

“Mistress”

“Fez”

“Postcard”

“Wedding”

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TV SPOTS

Vegas Stories II

“Limo”

“Time Honored”

“Cell Phone”

“Luggage”

“Silent Plane”

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It's Branding, Baby!



Award Winning Campaign



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TV SPOTS

Vegas Stories III

“Punch Drunk”

“Parents”

“Right Answer”

“Bachelor Party”

“Names”

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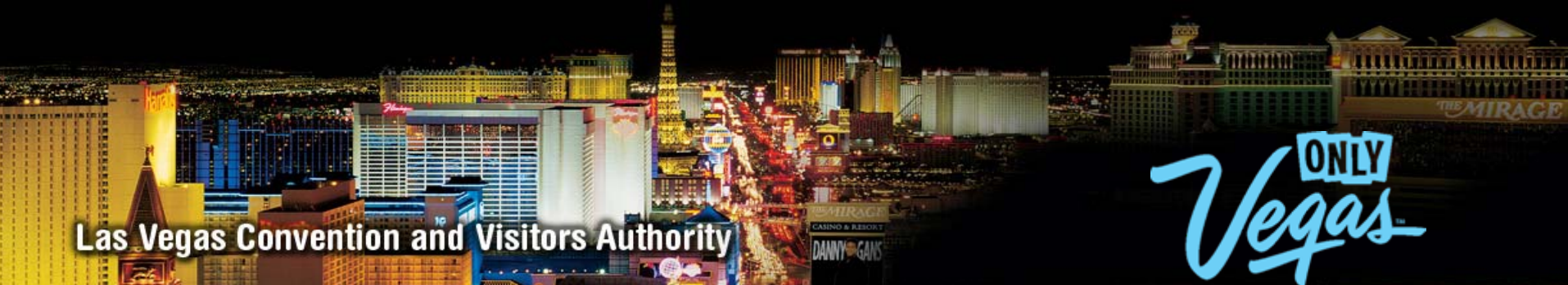
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Prepare Your Alibi...

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TV SPOTS

Vegas Alibi

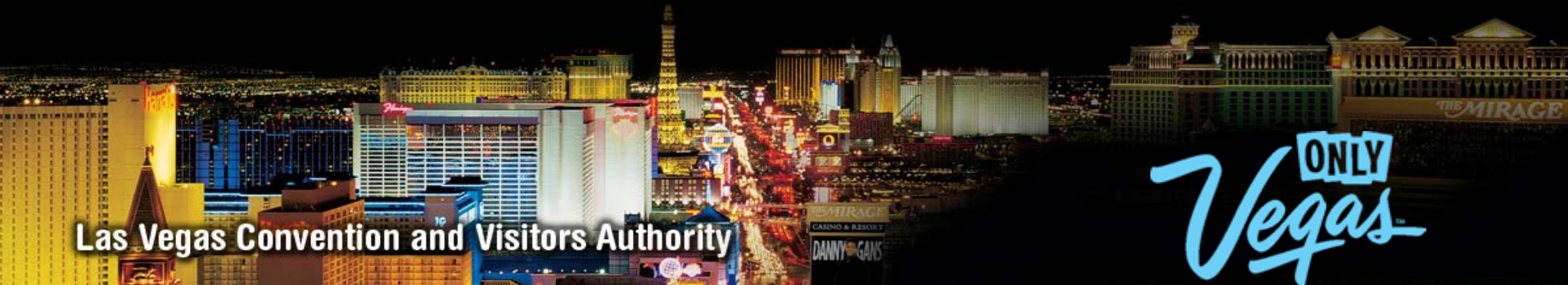
“Shopping”

“Dining”

“Entertainment”

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Questions

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