glsresearch

Research that works.

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

San Francisco
Las Vegas

LAUGHLIN VISITOR PROFILE

Calendar Year 2006

Annual Report

January 1, 2006 to December 31, 2006

Prepared for:

Laughlin Visitors Bureau

A Division Of The
Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

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

VISITOR PROFILE 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

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

TABLE OF CONTENTS

TABLE OF FIGURES

Page

TABLE OF FIGURES
(Continued/2)

Page

TABLE OF FIGURES
(Continued/3)

EXECUTIVE SUMMARY

The Laughlin Visitor Profile Study is conducted monthly and reported annually to provide an ongoing assessment of the Laughlin visitor and trends in visitor behavior over time. **In the past, data has been collected within a fiscal year, from July through June, and all reports prior to 2004 displayed <u>fiscal</u> year data. Based on collective feedback of the LVCVA's resort partners and other key audiences, beginning with the 2004 visitor profile the data is presented following a <u>calendar</u> year timeframe. With data now reported on a <u>calendar</u> year basis, the 2003 figures in this report may differ from the fiscal 2003 figures reported in previous visitor profile studies.**

This report presents the findings from the 1,200 personal interviews conducted by GLS Research from January 1, 2006 to December 31, 2006. Approximately one hundred (100) in-person interviews were conducted per month in or near Laughlin hotel-casinos and hotels.

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 section presents the research highlights, beginning on the next page. The findings are presented in detail starting on page 10.

REASONS FOR VISITING

Fifteen percent (15%) of visitors were first-time visitors to Laughlin. Among first-time visitors, 58% said their primary reason for visiting Laughlin was vacation or pleasure (considerably lower than in previous years), while 18% mentioned gambling (considerably higher than in previous years). Among repeat visitors, 47% mentioned vacation or pleasure as their primary reason for their current visit (down from past years), while gambling was cited by 36% (up from past years). The average number of Laughlin visits among all visitors in the past year was 2.5, down from prior years, while among repeat visitors it was 2.8, also down from prior years. The average number of visits among all visitors in the past five years is 10.5 (down from previous years), while among repeat visitors it is 12.1 (also down from previous years).

SUMMARY TABLE OF REASONS FOR VISITING AND VISITATION FREQUENCY

	2003	2004	2005	2006
Proportion of respondents who were first-time visitors	14%	16%	15%	15%
Proportion of respondents whose primary purpose for current trip was vacation or pleasure (among first-time visitors)	74%	77%	72%	58%
Proportion of respondents whose primary purpose for current trip was to gamble (among first-time visitors)	9%	4%	8%	18%
Proportion of respondents whose primary purpose for current trip was vacation or pleasure (among repeat visitors)	59%	65%	55%	47%
Proportion of respondents whose primary purpose for current trip was to gamble (among repeat visitors)	26%	21%	24%	36%
Average number of visits in past five years (among all visitors)	13.5	11.5	11.5	10.5
Average number of visits in past five years (among repeat visitors)	15.5	13.5	13.3	12.1
Average number of visits in past year (among all visitors)	3.8	3.2	3.2	2.5
Average number of visits in past year (among repeat visitors)	4.2	3.6	3.6	2.8

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (88%), though more arrived by air (12%) than in prior years. Almost nine in ten visitors (89%) arrived in Laughlin directly from their permanent residences, up from prior years. As in the past, most visitors decided where to stay in Laughlin before leaving home (93%). Almost seven in eight visitors (85%) who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin, up significantly over previous years. Eight in ten visitors (80%) decided what shows to see after arriving in Laughlin (up considerably over past years). Eight percent (8%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2006, up significantly from previous years, while 13% said they used the Internet to plan their trip (up a little from previous years). One in five Laughlin visitors (20%) visited Las Vegas on their current trip to Laughlin, about the same as in prior years. Only seven percent of visitors (7%) toured other nearby places, down significantly from past years.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2003	2004	2005	2006
Proportion of respondents who traveled to Laughlin by ground transportation (automobile/bus/RV)	93%	93%	93%	88%
Proportion of respondents who traveled to Laughlin by air	7%	7%	7%	12%
Proportion of respondents who traveled to Laughlin from their permanent residence	78%	75%	75%	89%
Proportion of respondents who decided where to stay in Laughlin before arrival	89%	91%	92%	93%
Proportion of respondents who decided where to gamble in Laughlin before arrival	50%	60%	64%	85%
Proportion of respondents who decided which shows to see in Laughlin after arrival	53%	59%	58%	80%
Proportion of respondents who used the assistance of a travel agent in planning their trip to Laughlin	3%	1%	2%	8%
Proportion of respondents who used the Internet in planning their trip to Laughlin	10%	11%	11%	13%
Proportion of respondents who have visited Las Vegas in the past five years	82%	81%	78%	74%
Proportion of respondents who visited Las Vegas on their current trip to Laughlin	18%	18%	20%	20%
Proportion of respondents who toured nearby places	15%	23%	22%	7%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.0, down from 2.3 in 2004 and 2.4 in 2005. Only 3% had people under the age of 21 in their immediate party, down from 7% in 2003 and 2004. Almost all visitors (99%) stayed overnight in Laughlin. Their stay averaged 3.1 nights and 4.1 days, up significantly from 2.8 nights and 3.8 days in 2003, and 2.9 nights and 3.9 days in 2004. Among overnighters, 97% stayed in a hotel or motel, with an average of 2.0 room occupants. Non-package overnight visitors who stayed in a hotel or motel spent an average of $40.89 for their room, up significantly from $31.80 in 2003, $34.62 in 2004 and $37.56 in 2005. Twelve percent (12%) of visitors who stayed in a hotel or motel paid a package/tour group rate, down from 15% in 2003 and 14% in 2004. The average package cost was $223.80, up considerably over prior years. The average food and drink expenditure was $208.22 per trip, up significantly from past averages. The average local transportation expenditure was $3.78 per trip, (down from all prior averages). The average total spent on shopping in 2006 was $45.24 (up from $35.94 in 2003), $2.78 was spent on shows (down from $5.18 in 2004 and $3.97 in 2005), and an average of $0.97 was spent on sightseeing (a decrease from $2.09 in 2004).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2003	2004	2005	2006
Average number of adults in immediate party	2.1	2.3	2.4	2.0
Proportion of respondents with persons under 21 in their immediate party	7%	7%	5%	3%
Proportion of respondents who stayed overnight	95%	97%	98%	99%
Days stayed (average)	3.8	3.9	4.1	4.1
Nights stayed (average)	2.8	2.9	3.1	3.1
Proportion of respondents who stayed in a hotel or motel room (among those who stayed overnight)	95%	95%	96%	97%
Number of room occupants (average — hotel/motel only)	2.1	2.1	2.0	2.0
Lodging expenditures (average per night, hotel/motel overnight visitors only — excludes package and tour/travel group visitors)	$31.80	$34.62	$37.56	$40.89
Proportion of respondents who paid a package/ tour group rate (among those who stayed overnight in a hotel or motel)	15%	14%	12%	12%
Average cost of package per person (among package/tour group visitors)	$157.87	$183.40	$189.55	$223.80
Average trip expenditures for food and drink (all respondents)	$100.17	$142.71	$180.85	$208.22
Average trip expenditures for local transport (all respondents)	$11.81	$16.22	$9.16	$3.78
Average trip expenditures for shopping (all respondents)	$35.94	$44.25	$48.57	$45.24
Average trip expenditures for shows (all respondents)	$3.61	$5.18	$3.97	$2.78
Average trip expenditures for sightseeing (all respondents)	$0.63	$2.09	$1.75	$0.97

GAMING BEHAVIOR AND BUDGETS

Nearly all visitors (99%) gambled while in Laughlin. Those who gambled budgeted an average of $846.65*, up significantly from all prior averages. Gamblers spent an average of 6.2 hours a day gambling (up from all past years). Gamblers visited an average of 1.4 different casinos in 2006, down from prior years. Eighty-one percent of (81%) gamblers played slot machines or video machines most often (up from 77% in 2003 and 2004). Among these respondents, 51% played quarter machines most often (down from 59% in 2003 and 56% in 2004). The average number of coins or tokens per play was 10.4, up significantly from all past years. Sixteen percent (16%) played table games most often; among these respondents, 55% typically played a $5.00 minimum, with an average bet of $7.47, down significantly from $14.00 in 2004 and $12.21 last year.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2003	2004	2005	2006
Proportion who gambled while visiting Laughlin	96%	97%	97%	99%
Average trip gambling budget (among those who gambled)	$490.84	$533.03	$559.35	$846.65*
Average number of hours per day spent gambling (among those who gambled)	5.5	5.8	5.6	6.2
Average number of different casinos visited (among those who gambled)	2.5	2.4	2.5	1.4
Proportion who played slot machines/video machines most often (among those who gambled)	77%	77%	79%	81%
Proportion who played quarter machines most often (among those who played slot/video machines most often)	59%	56%	54%	51%
Average number of coins/tokens per play (among those who played slot/video machines most often)	5.1	6.0	7.6	10.4
Proportion who played table games most often (among those who gambled)	19%	18%	18%	16%
Proportion who played $5.00 table minimums most often (among those who played table games most often)	56%	54%	56%	55%
Average bet (among those who played table games most often)	$9.76	$14.00	$12.21	$7.47

* The estimated average gaming budget for 2006 has increased substantially from previous waves of this study. While it is possible that this result indicates a change in the customer mix for Laughlin, it is also possible that this result is simply a statistical anomaly. Future waves of this study will determine whether the former or latter explanation is supported.

ATTITUDINAL INFORMATION

The vast majority (96%) of visitors reported that they were "very satisfied" with their trip to Laughlin, up from 93% in 2003 and 94% in 2004. Among the few respondents who said they were only "somewhat" satisfied with their trip, hotel complaints increased (from 27% to 68%), while complaints about not winning enough gambling decreased (from 37% to 3%).

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2003	2004	2005	2006
Proportion who were "very satisfied" with their current trip to Laughlin	93%	94%	95%	96%
Proportion who complained about their hotel (among those who were "somewhat satisfied")	32%	62%	27%	68%
Proportion who complained about not winning enough money (among those who were "somewhat satisfied")	39%	15%	37%	3%

VISITOR DEMOGRAPHICS

Three-quarters (76%) of respondents to the 2006 Laughlin Visitor Profile were married. While three in ten visitors are from Southern California (31%), Laughlin had more foreign visitors in 2006 (7%) than previously (3% to 4%). Forty-four percent (44%) of visitors were 65 or older, up significantly from 38% in 2003, and the average age was 60.3, up from the average of 58.4 in 2003. Respondents were more likely to be retired (53%, down significantly from 59% each in 2004 and 2005) than employed (45%, up from 38% in 2004 and 35% in 2005), though the gap between retired and employed has narrowed. The largest proportion of respondents have a high school diploma or less (44%, up from 39% each in 2003 and 2005, and 40% in 2004). About one-half (49%) had a household income of less than $60,000, down from 54% in 2003, while 45% had incomes of $60,000 or more, up from 36% in 2003.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2003	2004	2005	2006
Proportion of respondents who were married	76%	77%	77%	76%
Proportion of respondents who were from the Southern California	38%	39%	34%	31%
Proportion of respondents who were 50 years old or older	75%	79%	82%	79%
Proportion of respondents 65 years old or older	38%	45%	44%	44%
Average age	58.4	60.4	60.9	60.3
Proportion of respondents who were retired	54%	59%	59%	53%
Proportion of respondents who were employed	43%	38%	35%	45%
Proportion of respondents with a high school diploma or less	39%	40%	39%	44%
Proportion of respondents with a household income less than $60,000	54%	49%	42%	49%

SUMMARY OF ECONOMIC IMPACT FACTORS

The following table summarizes the various factors included throughout this report related to the *economic impact* of Laughlin visitors between January 1, 2003 and December 31, 2006 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2003	2004	2005	2006
Days stayed (average)	3.8	3.9	4.1	4.1
Nights stayed (average)	2.8	2.9	3.1	3.1
Proportion of respondents who stayed overnight	95%	97%	98%	99%
Proportion of respondents who stayed in a hotel or motel room (among those who stayed overnight)	95%	95%	96%	97%
Lodging expenditures (average per night, hotel/motel overnight visitors only — excludes package and tour/travel group visitors)	$31.80	$34.62	$37.56	$40.89
Proportion of visitors who bought a hotel/transportation or hotel/amenities package or were traveling as part of a tour/travel group where accommodations were included (among those staying overnight in a hotel/ motel)	15%	14%	12%	12%
Average cost of package per person (among package/tour group visitors)	$157.87	$183.40	$189.55	$223.80
Number of room occupants (average — hotel/motel only)	2.1	2.1	2.0	2.0
Average trip expenditures for food and drink (all respondents)	$100.17	$142.71	$180.85	$208.22
Average trip expenditures for local transportation (all respondents)	$11.81	$16.22	$9.16	$3.78
Average trip expenditures for shopping (all respondents)	$35.94	$44.25	$48.57	$45.24
Average trip expenditures for shows (all respondents)	$3.61	$5.18	$3.97	$2.78
Average trip expenditures for sightseeing (all respondents)	$0.63	$2.09	$1.75	$0.97
Proportion who gambled while visiting Laughlin (all respondents)	96%	97%	97%	99.5%
Average trip gambling budget (among those who gambled)	$490.84	$533.03	$559.35	$846.65*

Details on these economic impact factors can be found throughout the body of this report.

* The estimated average gaming budget for 2006 has increased substantially from previous waves of this study. While it is possible that this result indicates a change in the customer mix for Laughlin, it is also possible that this result is simply a statistical anomaly. Future waves of this study will determine whether the former or latter explanation is supported.

INTRODUCTION

The Laughlin Visitor Profile Study is conducted monthly, and reported annually, to provide an ongoing assessment of the Laughlin visitor and trends in visitor behavior over time.

More specifically, the Laughlin Visitor Profile aims:

- To provide a profile of Laughlin visitors in terms of socio-demographic and behavioral characteristics.
- To monitor trends in visitor behavior and visitor characteristics.
- To supply detailed information on the vacation and gaming habits of different visitor groups, particularly gaming and non-gaming expenditures.
- To allow the identification of market segments and potential target markets.
- To provide a basis for calculating the economic impact of different visitor groups.
- To determine visitor satisfaction levels.

METHODOLOGY

In-person interviews were conducted with 1,200 randomly selected visitors. Approximately one hundred (100) interviews were conducted each month for 12 months from January through December 2006. Qualified survey respondents were visitors to Laughlin (non-residents) who were at least 21 years of age. (Residents of Bullhead City, Arizona, were not considered visitors). Residents of Clark County, including residents of Las Vegas but excluding residents of Laughlin, were treated as visitors to Laughlin. Only visitors who planned to leave Laughlin within 24 hours were asked to complete the survey.

Visitors were intercepted near Laughlin hotel-casinos and hotels. To assure a random selection of visitors, different locations were utilized on each interviewing day. Upon completion of the interview, visitors were given souvenirs as tokens of appreciation. Verification procedures were conducted throughout the project to assure accurate and valid interviewing.

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 visitors is appended to this report in the form of aggregate results.

Throughout this report, bar charts are used to illustrate the data. The data presented in these charts are based on the total sample of 1,200 respondents 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 compares them to the results of the 2003, 2004 and 2005 studies. Statistically significant differences in the behavior, attitudes, and opinions of visitors from year to year are pointed out in the text of the report. Throughout this report, if data is not presented for all four years, it is because the question was not asked for all four years.

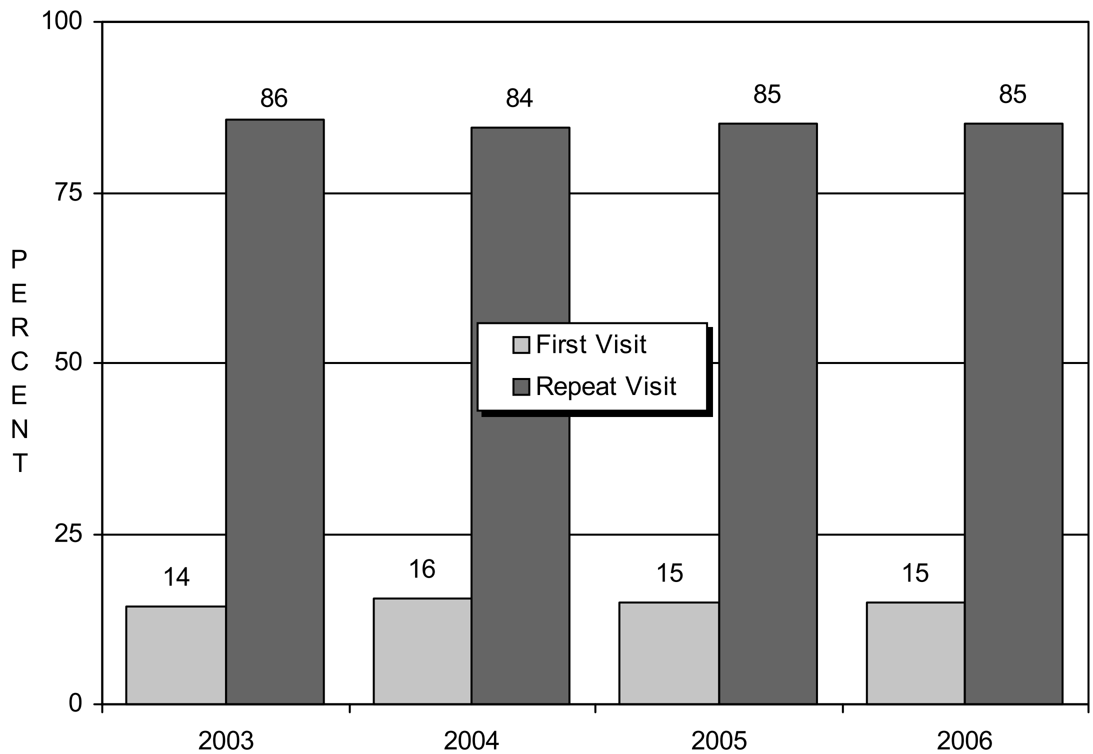
Details on the findings and conclusions of the survey are presented in the following sections of this report.

SUMMARY OF FINDINGS

REASONS FOR VISITING

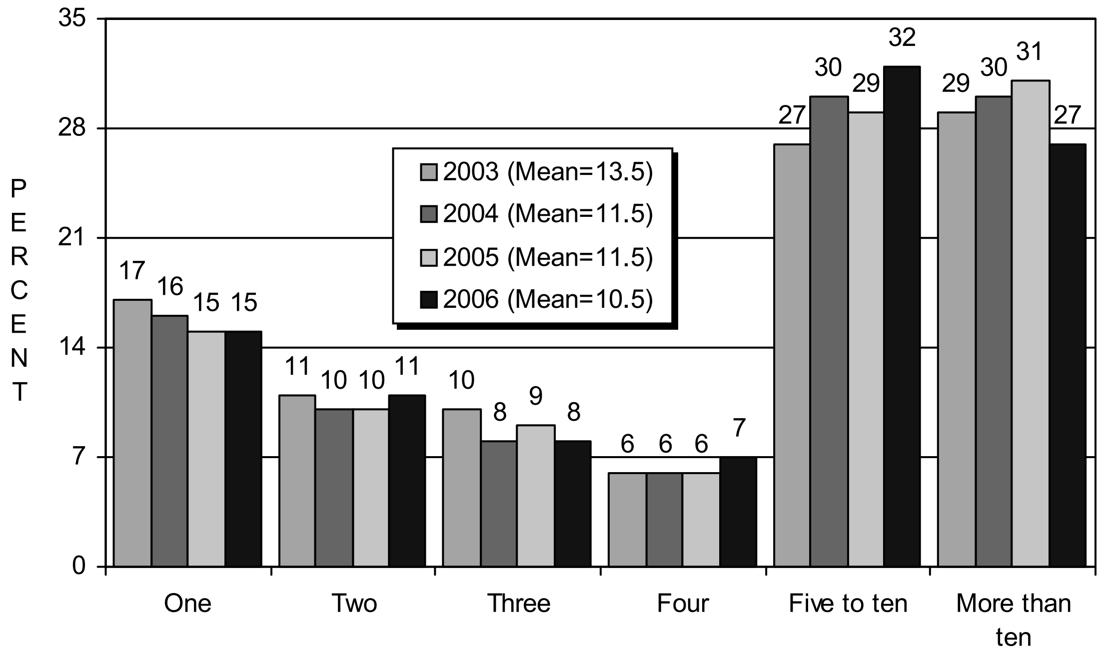
In the current study, 85% of respondents said they had visited Laughlin more than once, essentially unchanged since 2003 (Figure 1).

FIGURE 1
First Visit vs. Repeat Visit*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 2
Frequency Of Visits In Past Five Years*
(Among All Visitors)

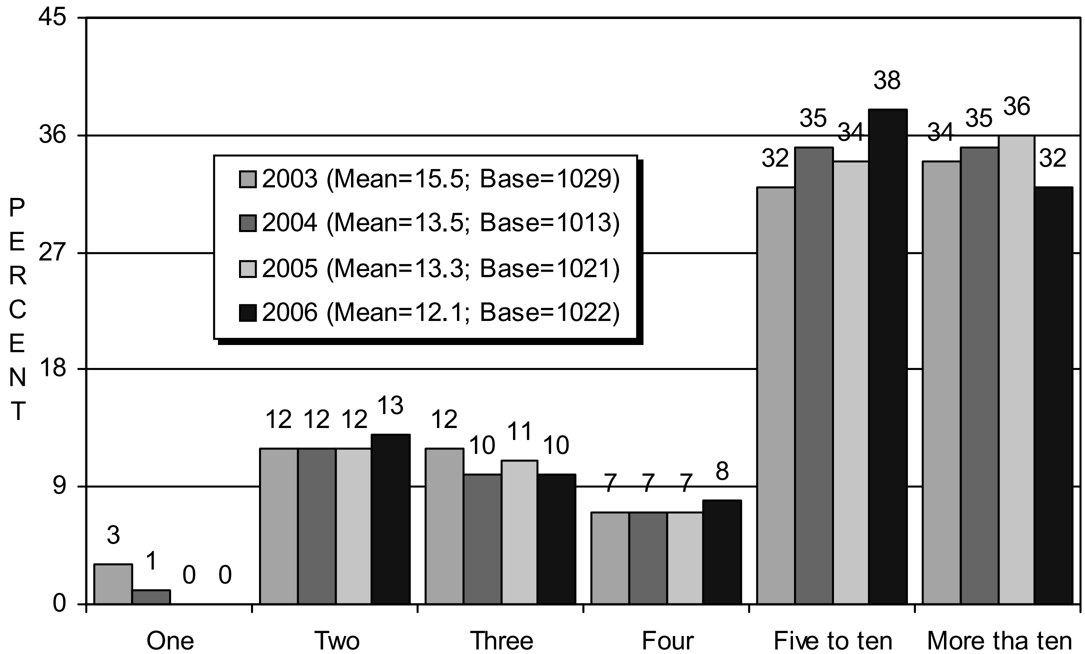


The average number of visits to Laughlin in the past five years *among all visitors* was 10.5 in this year's survey, down significantly from 13.5 in 2003 (Figure 2).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

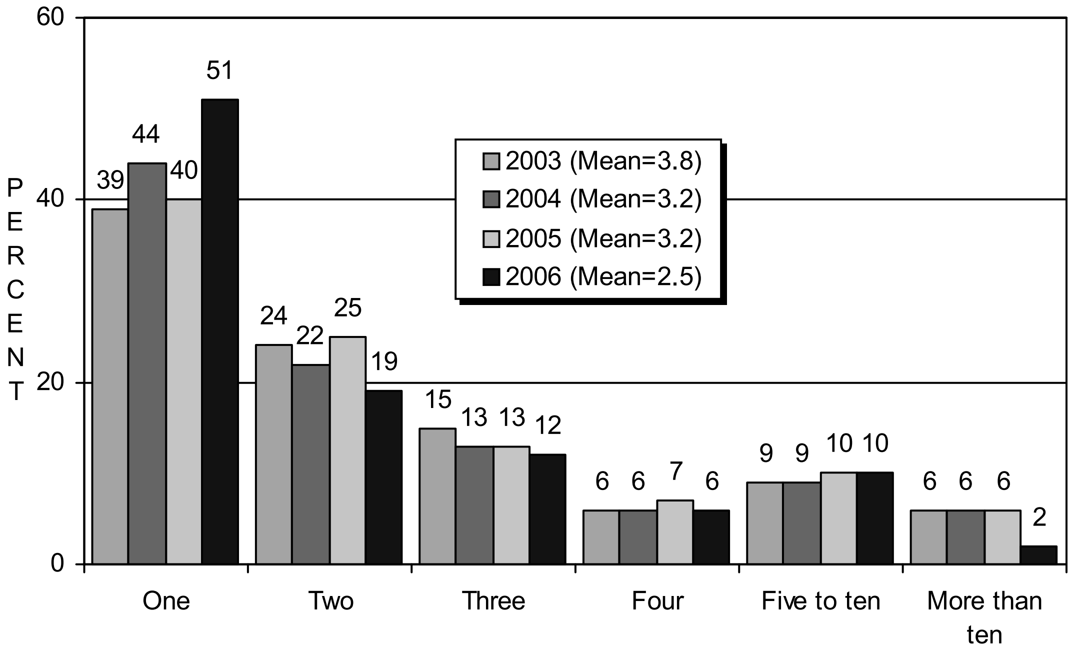
FIGURE 3
Frequency Of Visits In Past Five Years*
(Among Repeat Visitors)



The average number of visits to Laughlin during the past five years *among repeat visitors* was 12.1, down significantly from 15.5 in 2003 and 13.5 in 2004 (Figure 3).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 4
Frequency Of Visits In Past Year*
(Among All Visitors)

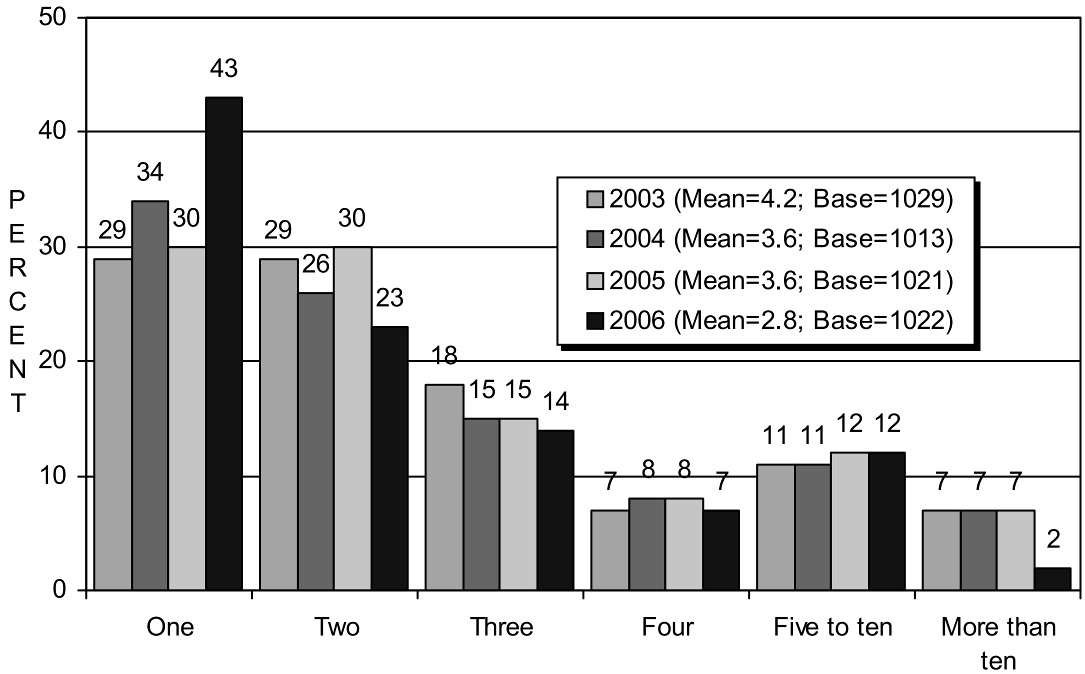


Among *all visitors*, respondents reported visiting Laughlin an average of 2.5 times in 2006, down significantly from 3.8 in 2003, and 3.2 in 2004 and 2005. Fifty-one percent (51%) reported visiting Laughlin only once in the past year, up from 39% in 2003, 44% in 2004, and 40% in 2005. Conversely, only 2% reported visiting Laughlin more than ten times in the past year, down from 6% from 2003 to 2005 (Figure 4).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

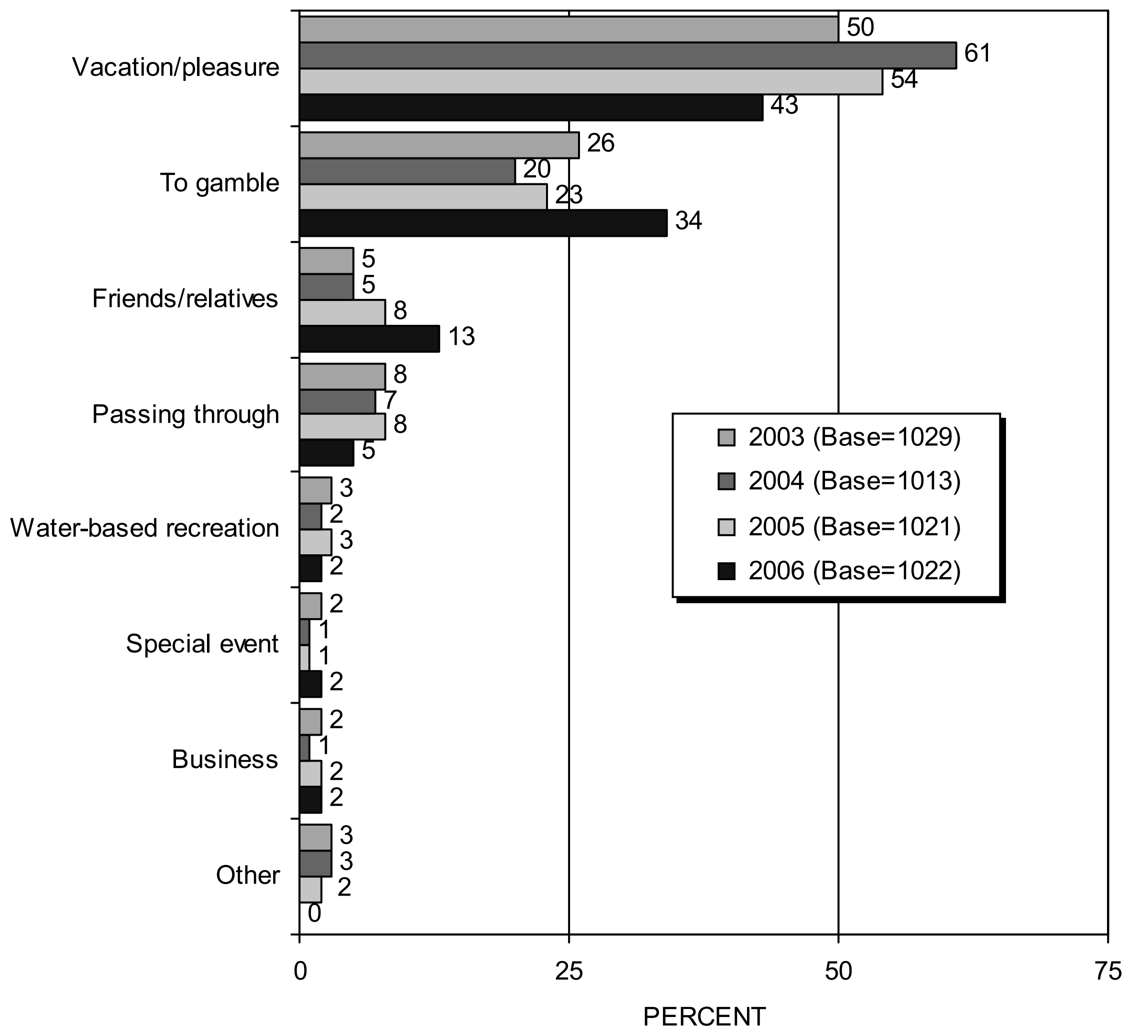
FIGURE 5
Frequency Of Visits In Past Year*
(Among Repeat Visitors)



During the past year, repeat visitors averaged 2.8 trips to Laughlin, down significantly from 4.2 in 2003 and 3.6 in 2004 and 2005. Among repeat visitors 43% reported visiting just once in the past year, up from 29% in 2003, 34% in 2004, and 30% in 2005, while 2% reported visiting ten or more times in the past year, down from 7% each in 2003 through 2005 (Figure 5).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 6
Primary Purpose Of First Visit*
(Among Repeat Visitors)

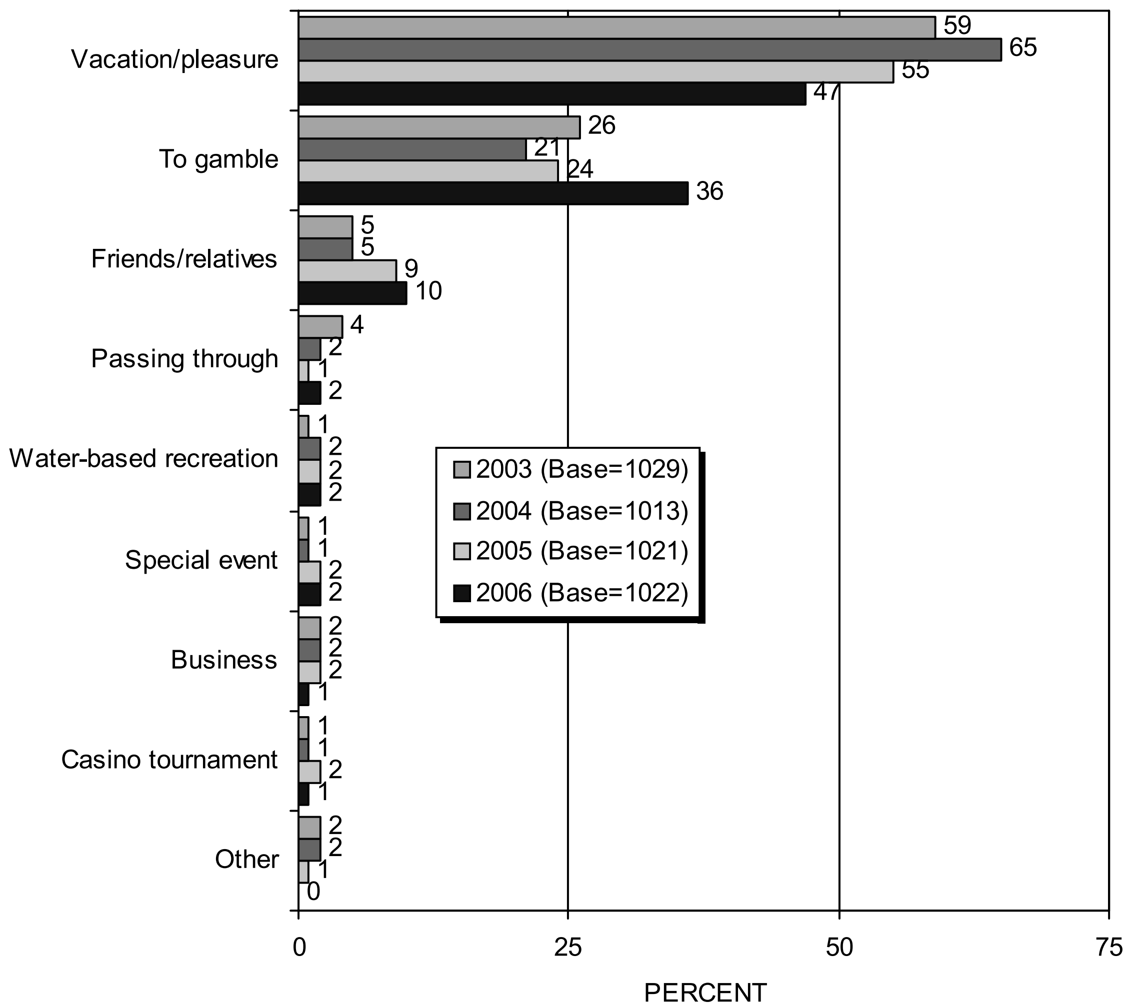


Forty-three percent (43%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure, a significant decrease from 50% in 2003, 61% in 2004, and 54% last year (Figure 6). Thirty-four percent (34%) said they first came to Laughlin for gambling, up from 26% in 2003, 20% in 2004, and 23% in 2005. Thirteen percent (13%) first came to Laughlin to visit family or friends, up from 5% in both 2003 and 2004 and 8% last year, 2% said they first came to Laughlin for water-based recreation, while 2% came for business, and 2% for a special event.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

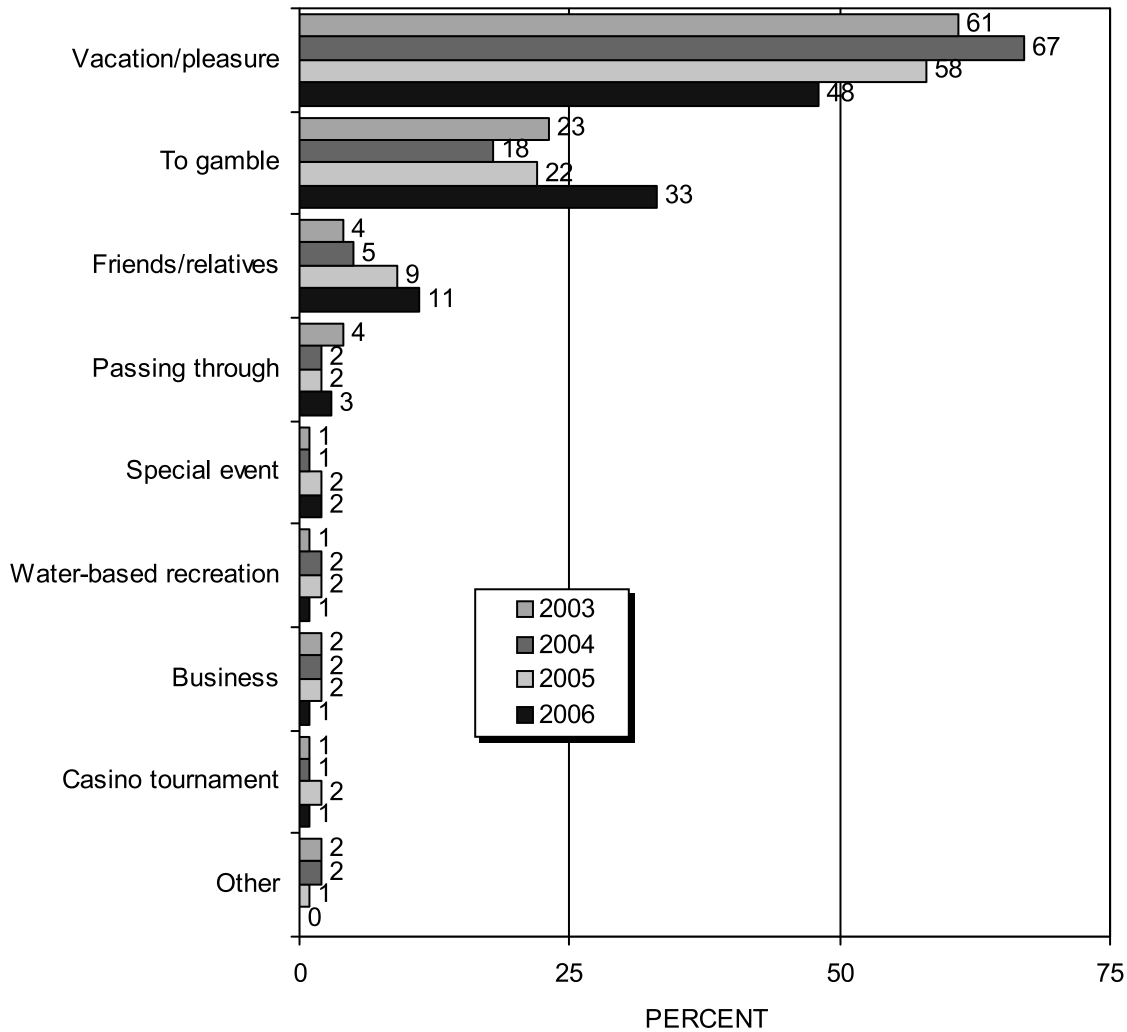
FIGURE 7
Primary Purpose Of Current Visit*
(Among Repeat Visitors)



Among repeat visitors, the proportion of those who said that the primary purpose for their *current* visit to Laughlin was vacation or pleasure (47%) was down significantly from 59% in 2003, 65% in 2004, and 55% in 2005. The proportion who said they came to gamble was 36%, up from 26% in 2003, 21% in 2004, and 24% in 2005. Ten percent (10%) said they came to visit friends or family, similar to last year, but down from 5% in 2003 and 2004, 1% came for business purposes, 2% for a special event, 1% for a casino tournament, and 2% for water-based recreation (Figure 7).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 8
Primary Purpose Of Current Visit*
(Among All Visitors)



As with repeat visitors, the proportion of *all visitors* in 2006 who reported that the primary purpose for their current visit to Laughlin was vacation or pleasure (48%) was down significantly from 2003 (61%), 2004 (67%), and last year (58%) (Figure 8). The proportion of all visitors who said gambling was the primary reason for their current visit (33%) was up significantly from 23% in 2003, 18% in 2004, and 22% last year. Eleven percent (11%) said they came to visit friends or relatives (up from 4% in 2003 and 5% in 2004), 2% for a special event, 1% for business, 1% for a casino tournament, and 1% for water-based recreation.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 9
Primary Purpose Of First Visit vs. Current Visit — 2006
(Among Repeat Visitors)

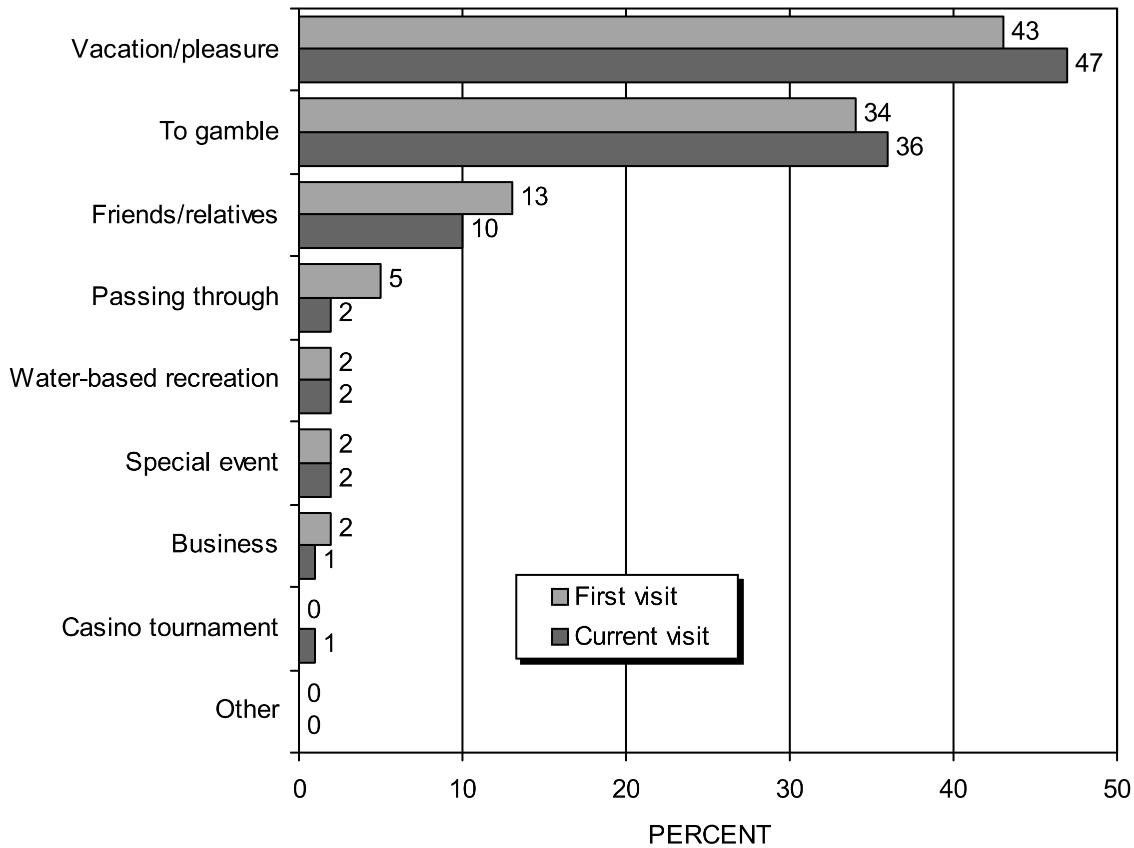


Figure 9 compares the reasons given by *repeat visitors* for their first Laughlin visit versus the reasons given for their current visit in 2006. A significantly higher proportion of repeat visitors said the purpose of their first trip was visiting friends and relative (13% vs. 10%) or “just passing through” (5% vs. 2%). Reasons for the current visit were more likely to be for vacation or pleasure, or gaming.

FIGURE 10
Primary Purpose Of Current Visit — 2006
(First-Time vs. Repeat Visitors)

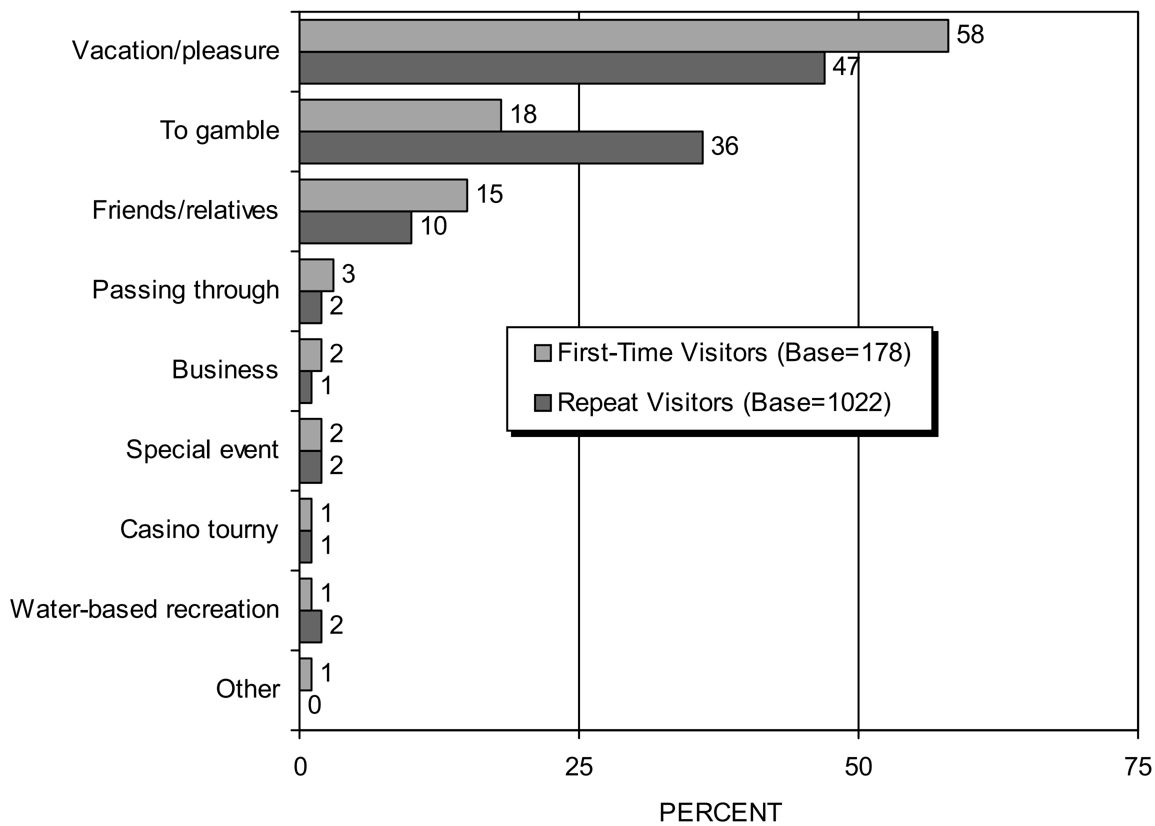
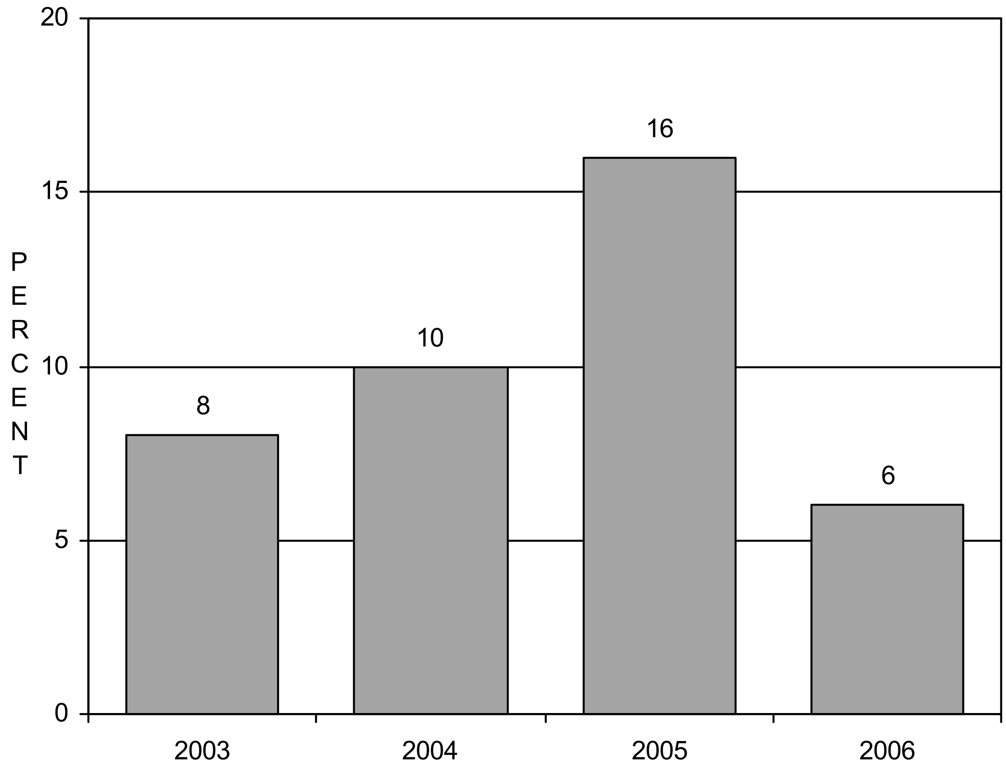


Figure 10 compares *repeat visitors* with *first-time visitors* in terms of purpose of their *current* visit to Laughlin in 2006. First-time visitors (58%) were significantly more likely than repeat visitors (47%) to say their current visit to Laughlin was for vacation or pleasure, or to visit friends and relatives (15% vs. 10%). Repeat visitors were significantly more likely to report visiting Laughlin primarily to gamble (36%) than were first-time visitors (18%).

FIGURE 11
Gaming Tournaments*

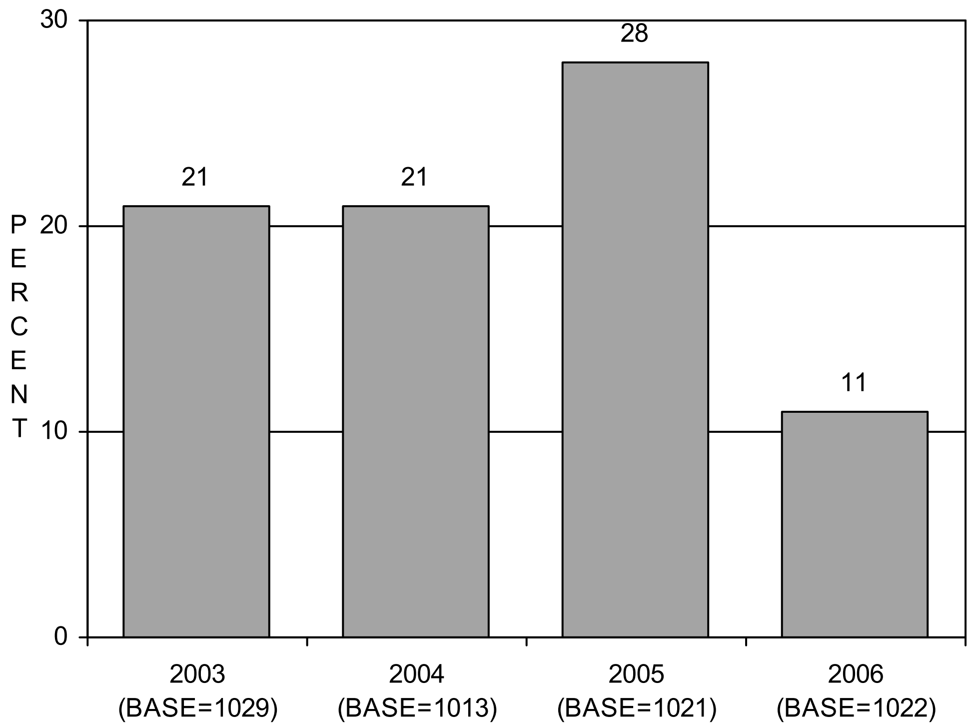


We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). Six percent (6%) of respondents in 2006 said they planned to participate in a gaming tournament, down significantly from 8% in 2003, 10% in 2004, and 16% in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

FIGURE 12
Visited Laughlin In The Past For A Special Event*
(Among Repeat Visitors)



We asked repeat visitors whether they had visited Laughlin in the past to attend a special event such as Desert Challenge, a rodeo, a car or motorcycle rally, or an outdoor concert (Figure 12). Eleven percent (11%) said they had, down significantly from 21% in 2003 and 2004, and 28% in 2005.

---

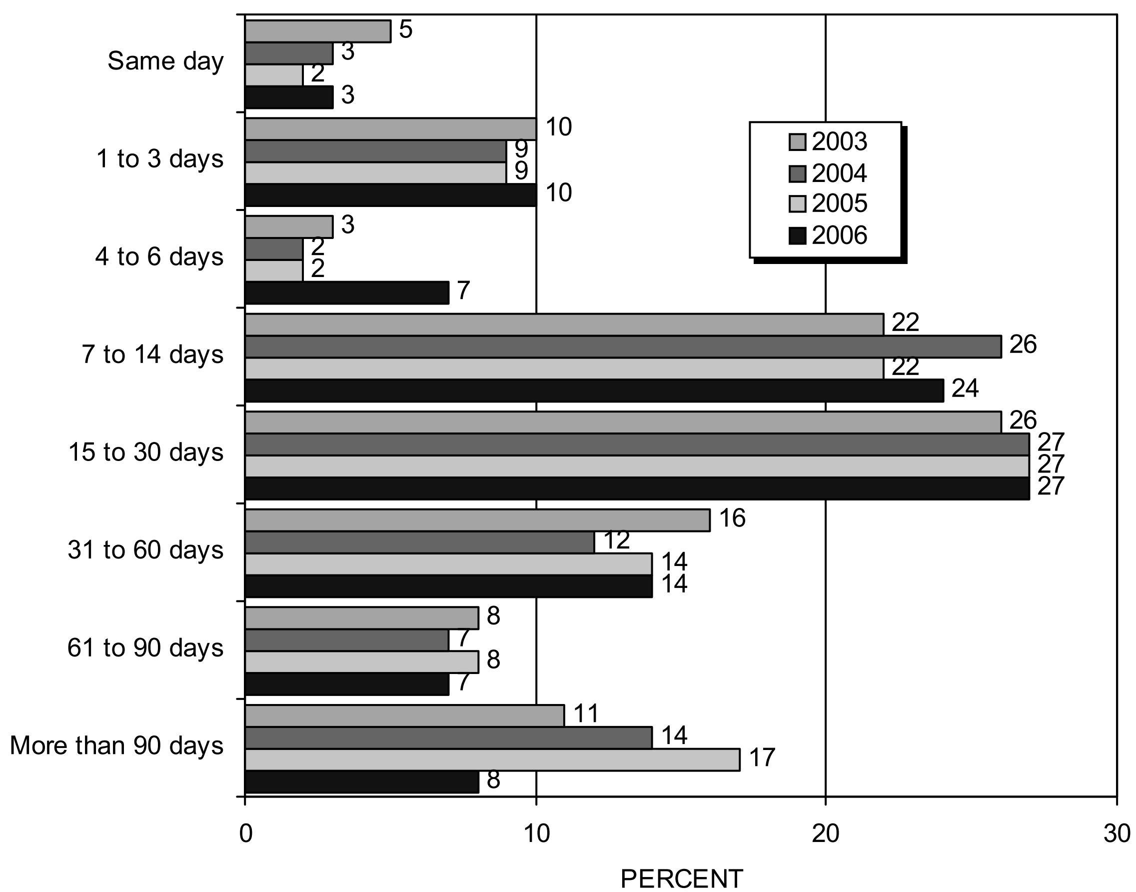
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

TRAVEL PLANNING

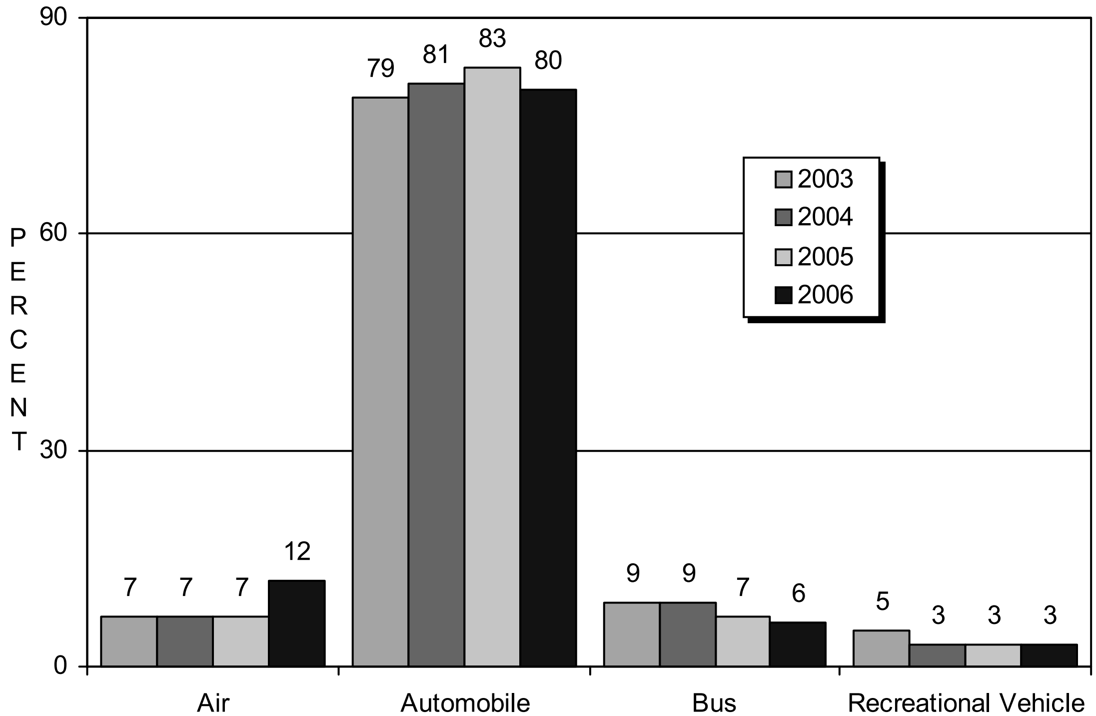
Travel planning varied broadly — from same-day planning to travel plans made more than 90 days in advance. However, eight in ten (80%) planned their trip at least one week in advance (Figure 13). About half (51%) planned their trip seven to 30 days in advance, a significant decrease from 48% in 2003. The proportion who did same day planning was 3%, down from 5% in 2003. Eight percent (8%) of Laughlin visitors planned their trip more than ninety days in advance, a significant decrease from 11% in 2003, 14% in 2004, and 17% in 2005.

FIGURE 13
Advance Travel Planning*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

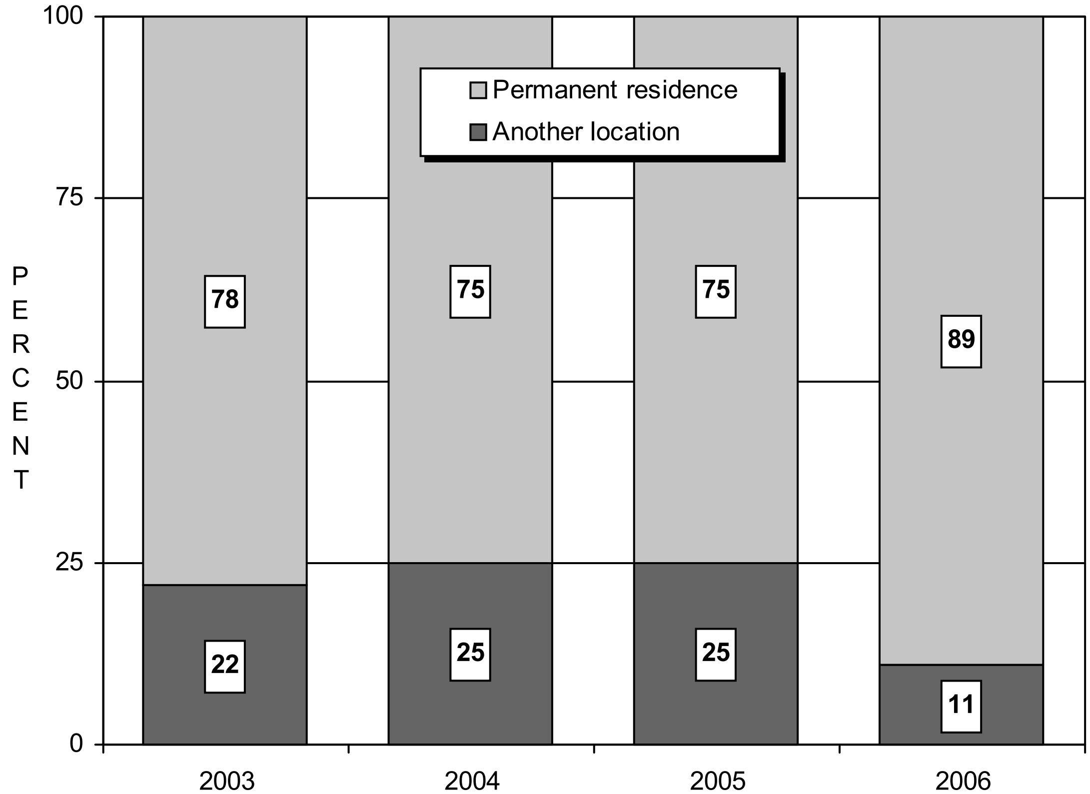
FIGURE 14
Transportation To Laughlin*



As in past years, most visitors traveled to Laughlin by automobile (80%, similar to past years) (Figure 14). Six percent (6%) traveled by bus, down from 9% in 2003 and 2004, 12% said they came by air (up from 7% each in 2003 to 2005), and 3% came in an RV.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

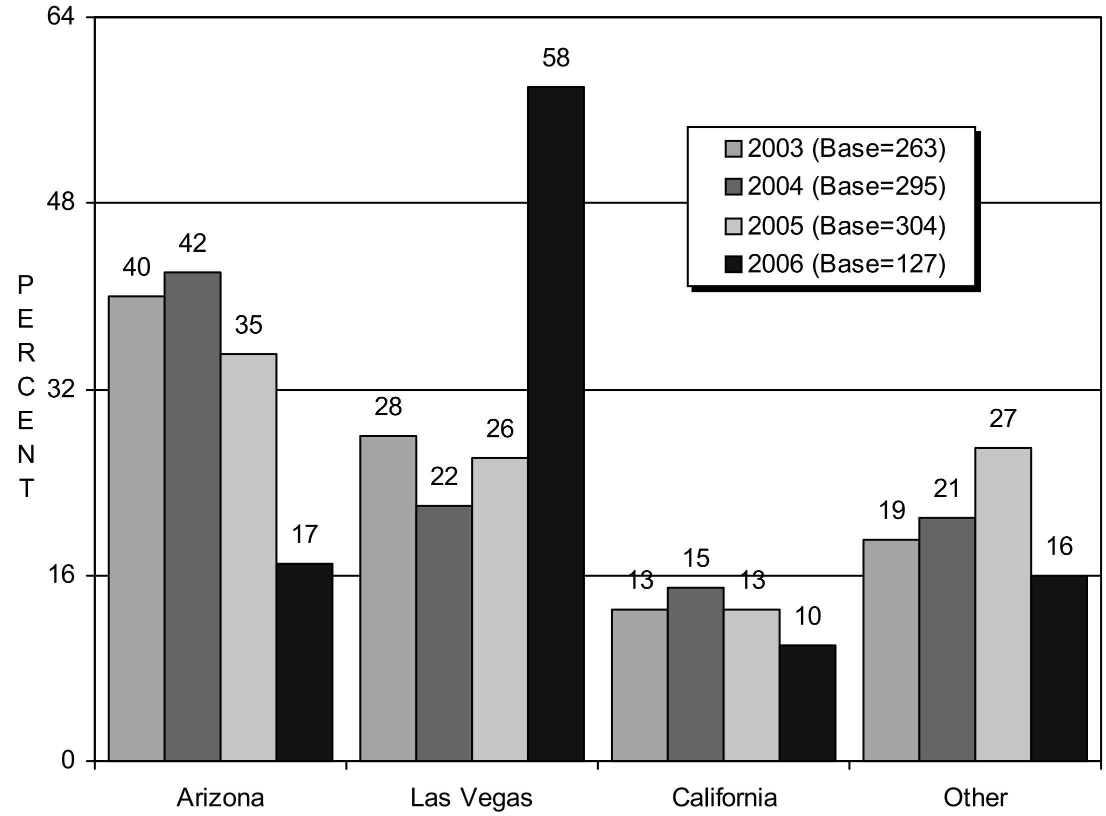
FIGURE 15
Whether Visitors Came To Laughlin From Their
Permanent Residence Or From Some Other Location*



In 2006, nine in ten visitors (89%) arrived in Laughlin directly from their permanent residences, up from 78% in 2003, and 75% each in 2004 and 2005 (Figure 15). Conversely, 11% said they came to Laughlin from another location, down from 22% in 2003, and 25% each in 2004 and 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

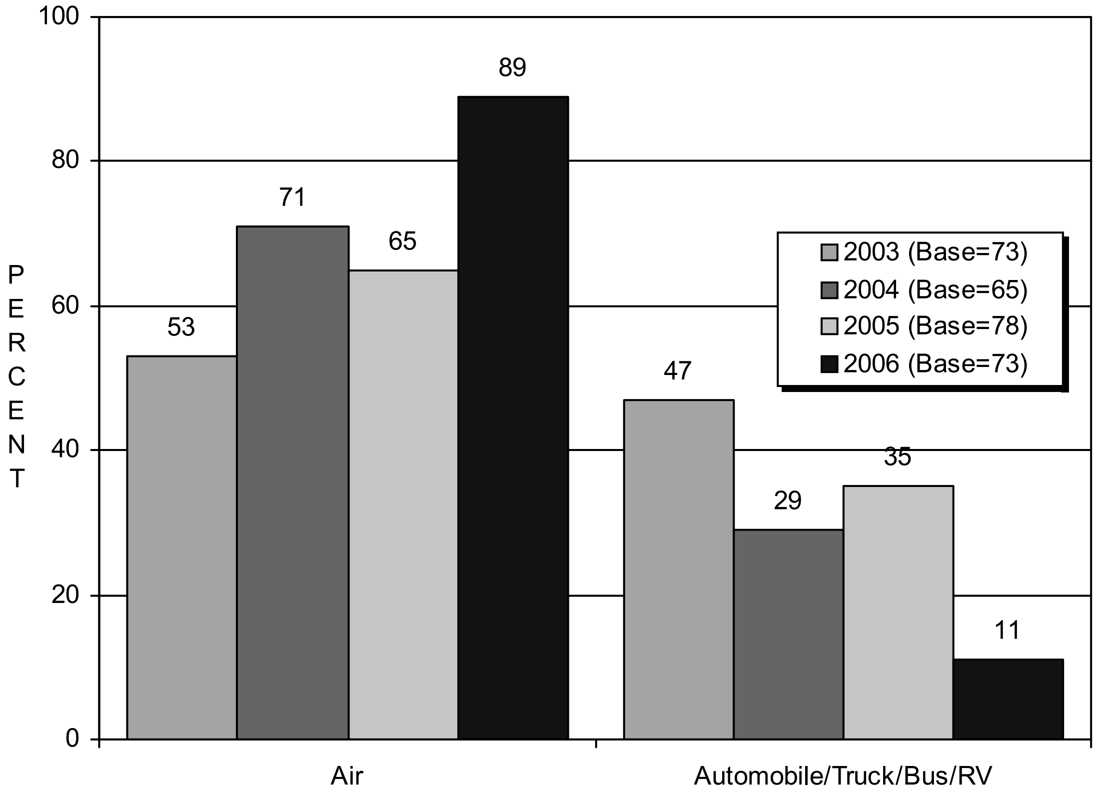
FIGURE 16
Where Visitors Came From*
(Among Those Who Did Not Come To Laughlin
Directly From Their Permanent Residence)



Among those who came to Laughlin after visiting another location, 58% came from Las Vegas (an increase from 28% in 2003, 22% in 2004, and 26% last year), 17% from Arizona (a decrease from 40% in 2003, 42% in 2004, and 35% in 2005), 10% from California, and 16% from some other location — down from 27% last year (Figure 16).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 17
Transportation To Las Vegas*
(Among Those Who Traveled To Laughlin From Las Vegas)

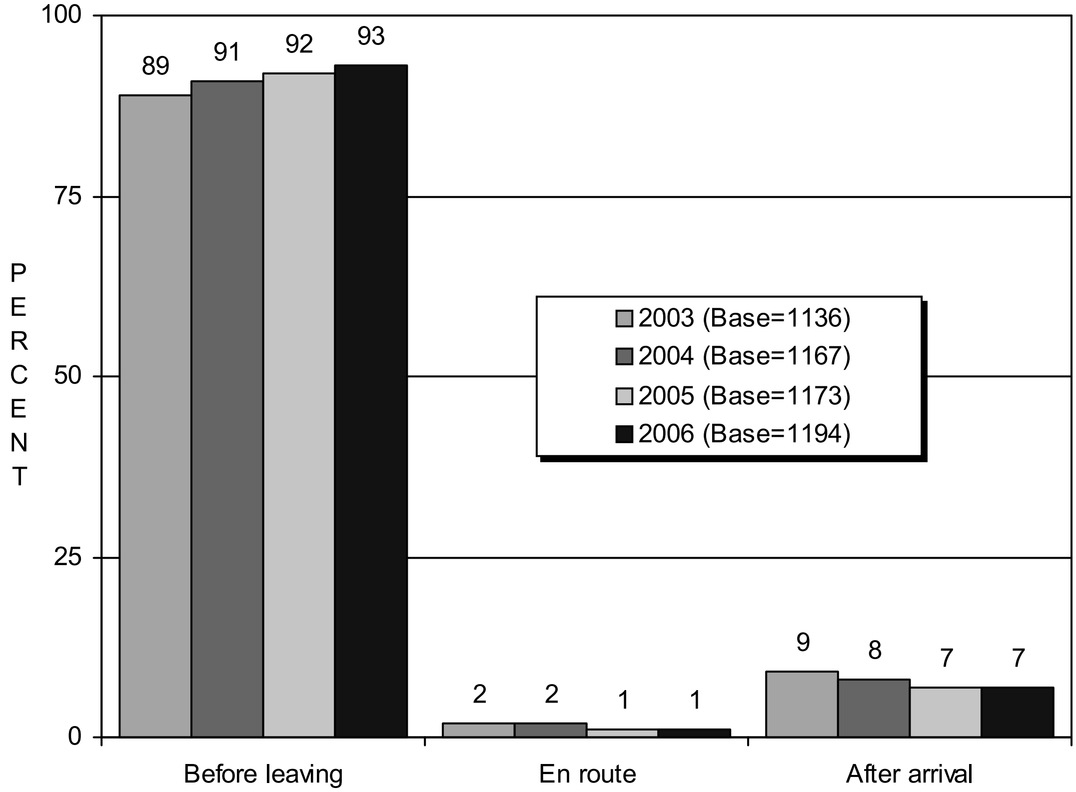


We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Eighty-nine percent (89%) arrived by air (an increase from 53% in 2003, 71% in 2004, and 65% last year), and 11% arrived by ground transportation (a decrease from 47% in 2003, 29% in 2004, and 35% last year).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

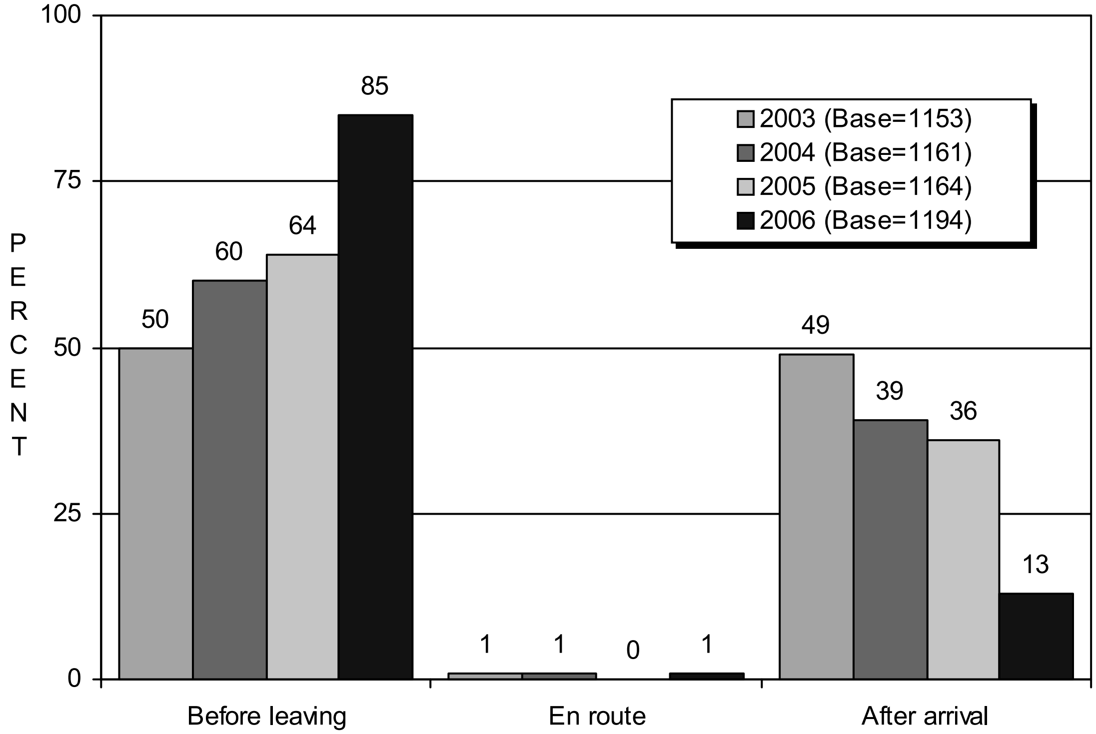
FIGURE 18
When Decided Where To Stay*
(Among Those Who Stayed Overnight)



In 2006, most overnight visitors decided where to stay in Laughlin prior to their visits (93%, up from 89% in 2003 and 91% in 2004). Seven percent (7%) decided after arrival, while 1% decided en route to Laughlin (Figure 18).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

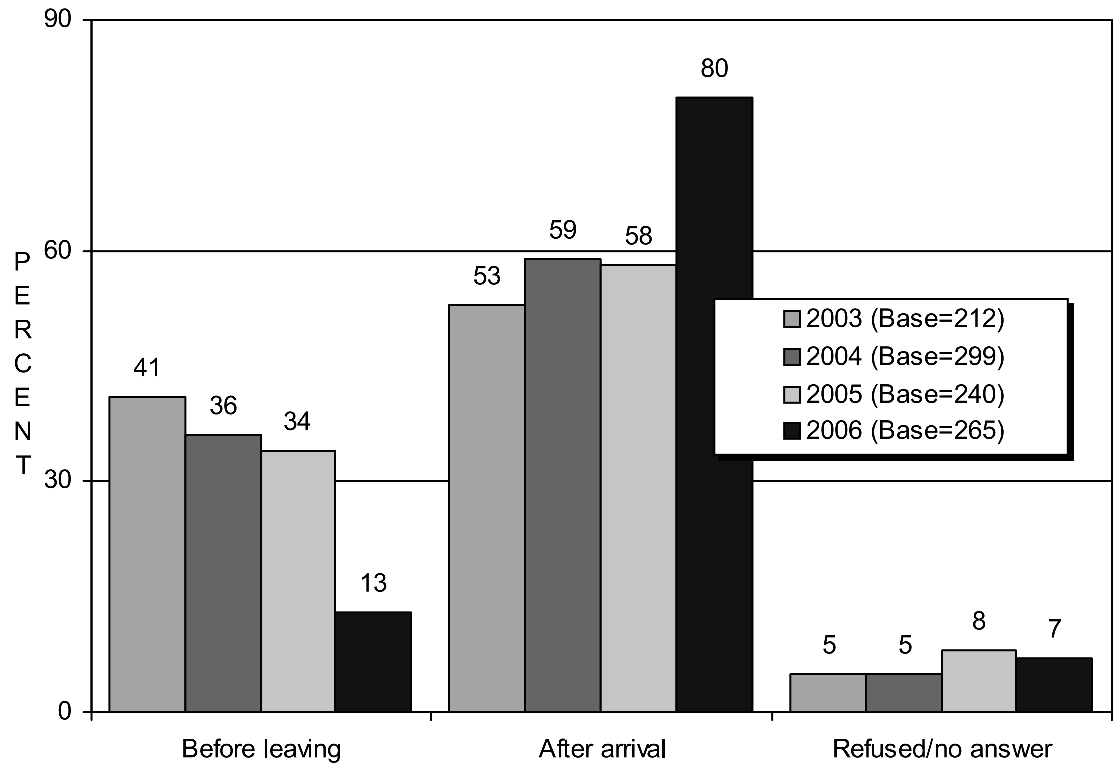
FIGURE 19
When Decided Where To Gamble*
(Among Those Who Gambled)



Eighty-five percent (85%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin, up significantly from 50% in 2003, 60% in 2004, and 64% in 2005 (Figure 19). Thirteen percent (13%) reported making their decision about where to gamble after they arrived, down from 49% in 2003, 39% in 2004, and 36% in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 20
When Decided Which Shows To See*
(Among Those Who Saw Shows)

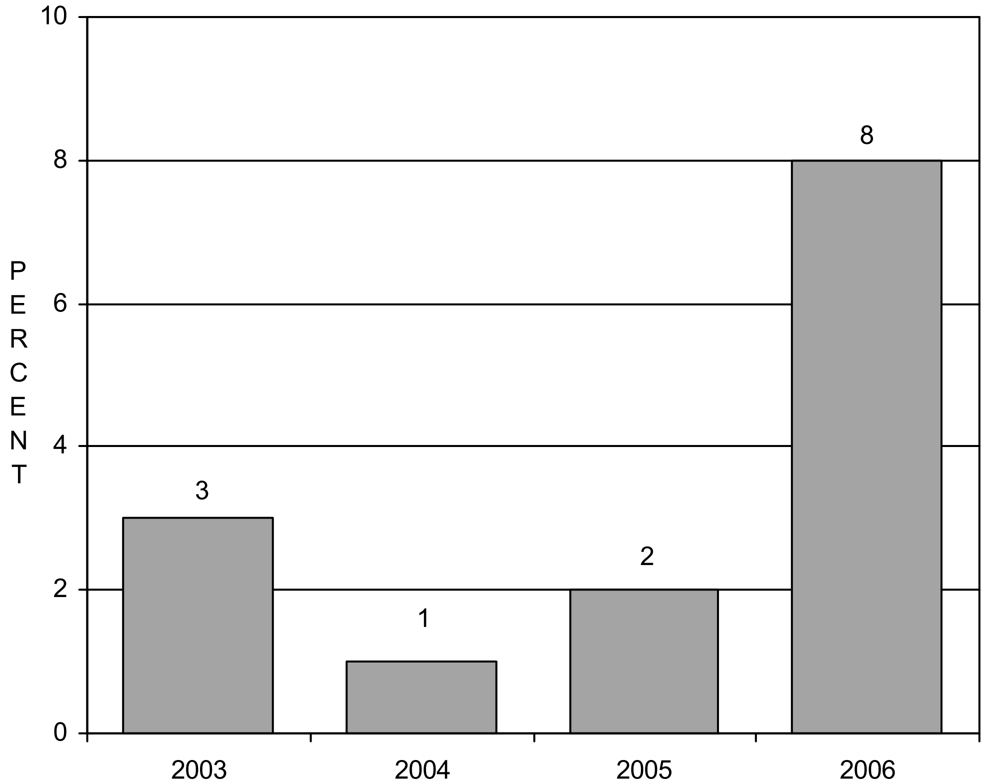


Among visitors who reported going to see a show, 80% decided what shows to see after arriving in Laughlin, a significant increase from 53% in 2003, 59% in 2004, and 58% last year (Figure 20). Thirteen (13%) of visitors decided what shows to see before leaving home, a decrease from 41% in 2003, 36% in 2004, and 34% last year.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 21
Travel Agent Assistance*
(Among All Visitors)

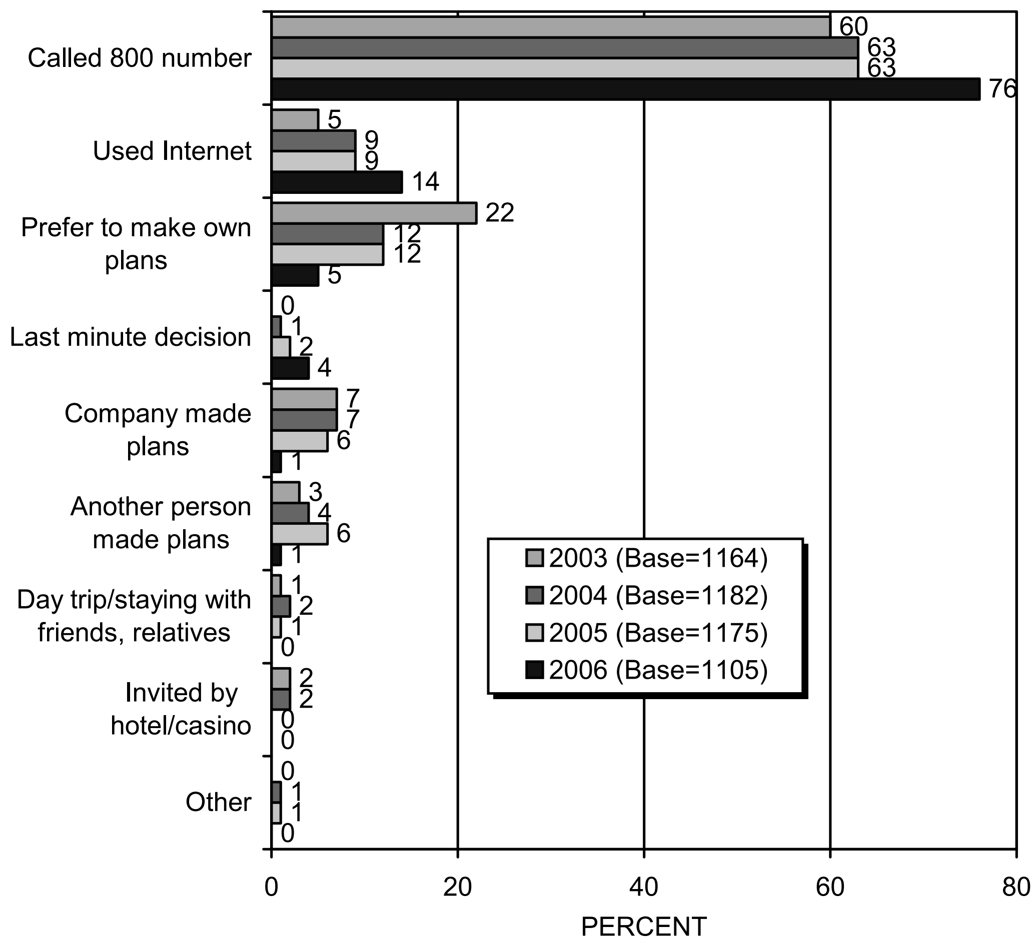


Eight percent (8%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2006, a significant increase from 3% in 2003, 1% in 2004, and 2% in 2005 (Figure 21).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 22
Main Reason For Not Using A Travel Agent*
(Among Those Not Using Travel Agent)

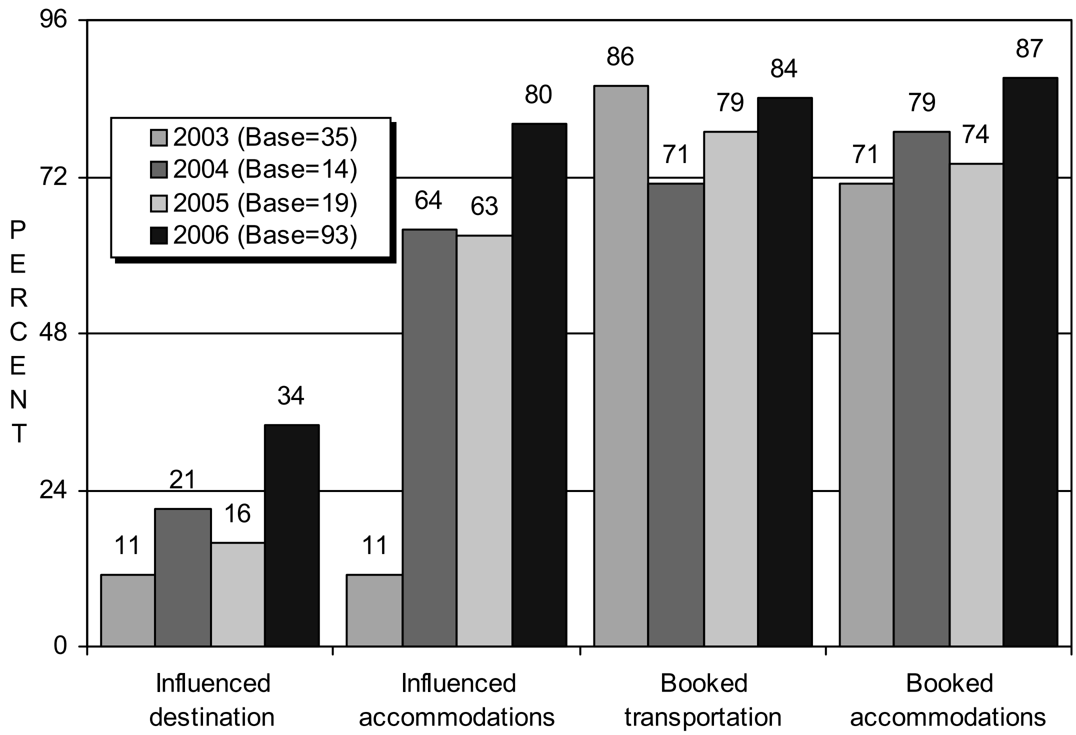


Respondents were asked to indicate the primary reason why they did not use a travel agent to help with their travel arrangements (Figure 22). More than three in four (76%) said it was because they preferred to use an 800 number to call the property directly, an increase from 60% in 2003, 63% in 2004, and 63% last year. Fourteen percent (14%) said they used the Internet to make their travel arrangements, up significantly from 5% in 2003 and 9% each in 2004 and 2005. Five percent (5%) preferred to make their own plans, down from 22% in 2003 and 12% each in 2004 and 2005. Four percent (4%) said it was a last minute decision and there was no time to call a travel agent, up from 2% or less in past years.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 23
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)

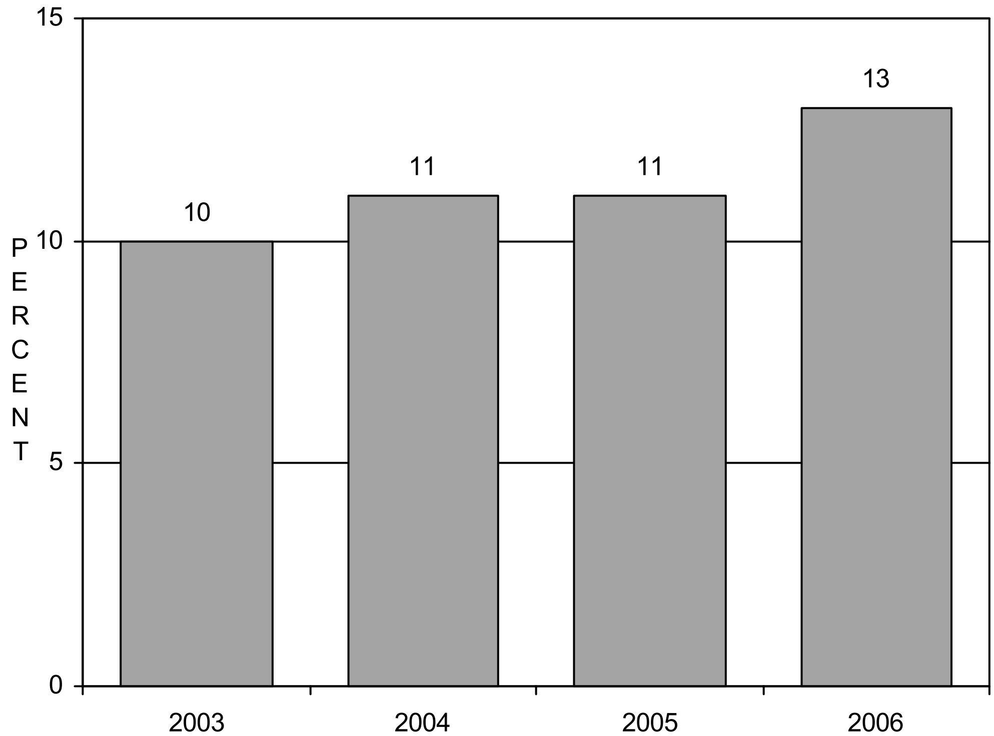


Among visitors who reported using a travel agent, 84% had help with booking their transportation, and 87% had travel agents help them book their accommodations (Figure 23). Eighty percent (80%) said the agent *influenced* their choice of accommodations, up from 11% in 2003, and 34% said the travel agent *influenced* their decision to visit Laughlin, up from 11% in 2003.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 24
Whether Used Internet To Plan Trip*

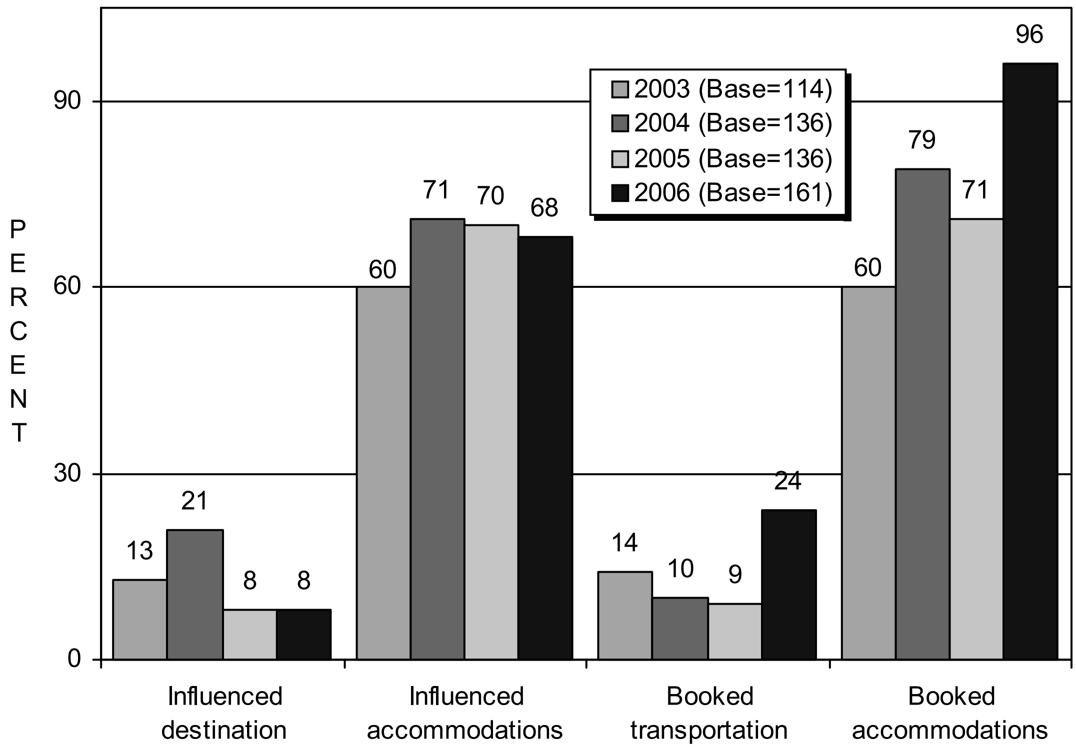


Visitors were asked if they used the Internet to plan their trip. Thirteen percent (13%) said yes, up from 10% in 2003 (Figure 24).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are shown in this figure.

FIGURE 25
Internet Influence And Use*
(Among Those Who Used Internet To Plan Trip)



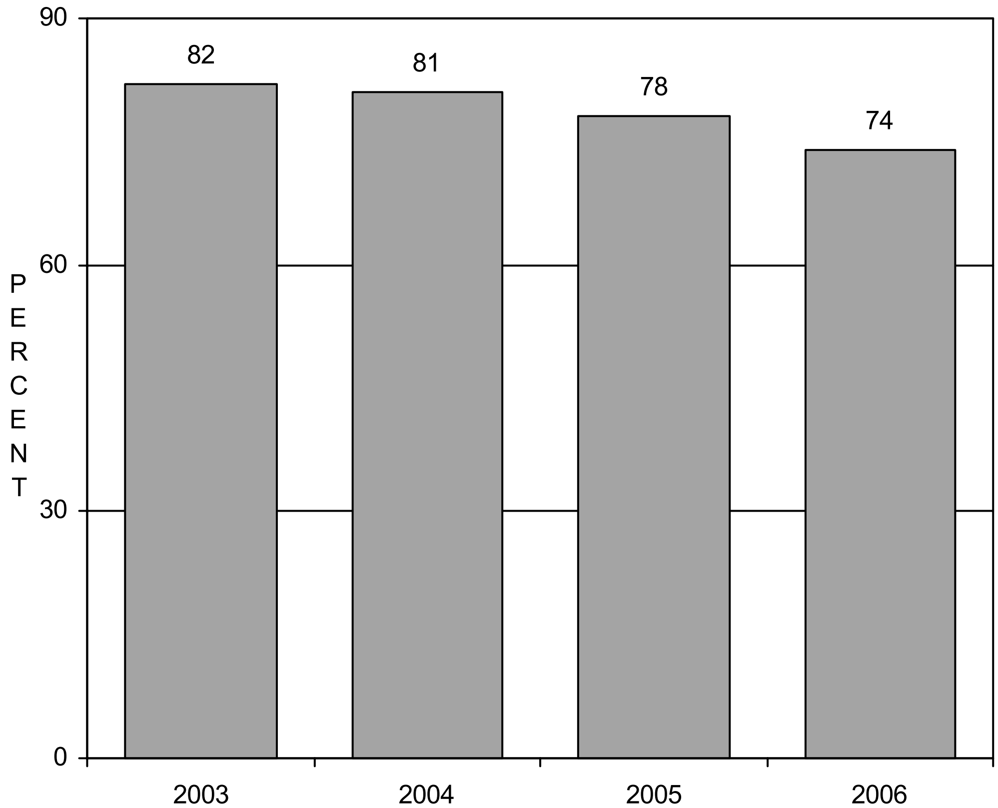
Among visitors who used the Internet to plan their trip, 68% said the Internet influenced their choice of accommodations, and 96% booked their accommodations online (a significant increase from 60% in 2003, 79% in 2004, and 71% last year). Eight percent (8%) said the Internet influenced their decision to visit Laughlin (down from 21% in 2004), while 24% said they booked transportation to Laughlin through the Internet, an increase from 14% in 2003, 10% in 2004, and 9% in 2005 (Figure 25).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are shown in this figure.

FIGURE 26
Whether Visited Las Vegas During Past Five Years*

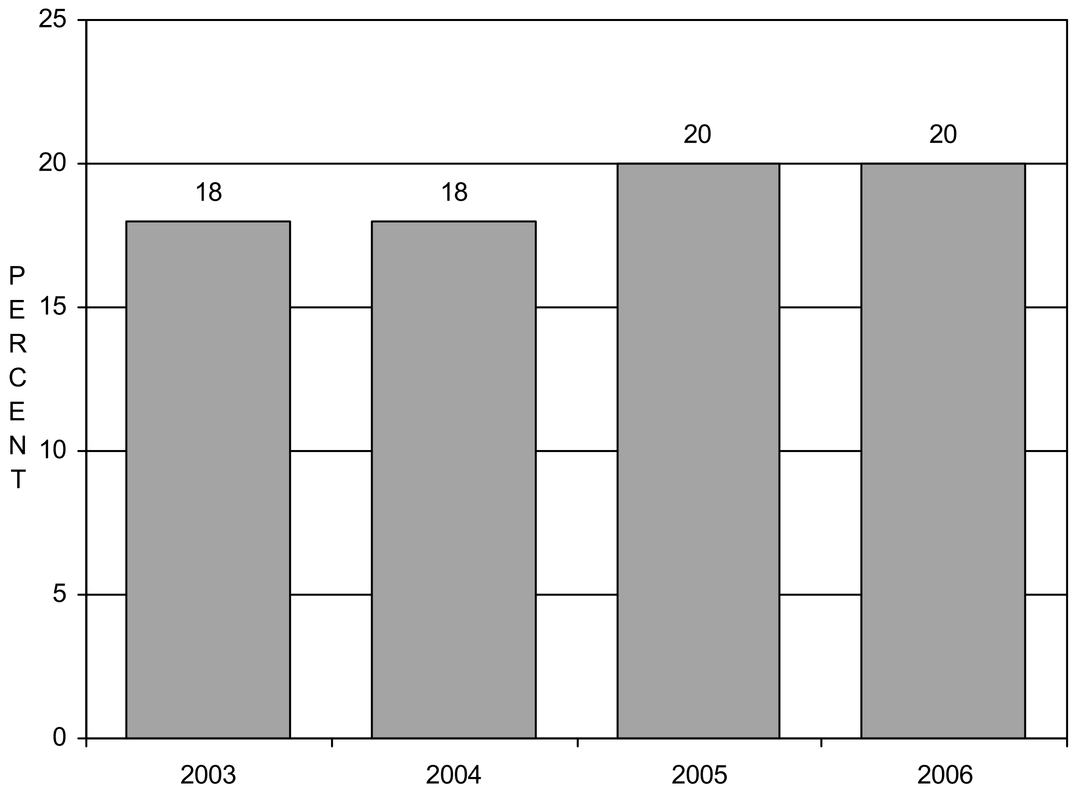


Nearly three in four (74%) Laughlin visitors said they have visited Las Vegas some time in the past five years, down from 82% in 2003, 81% in 2004, and 78% last year (Figure 26).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

FIGURE 27
Visiting Las Vegas
On This Trip To Laughlin*

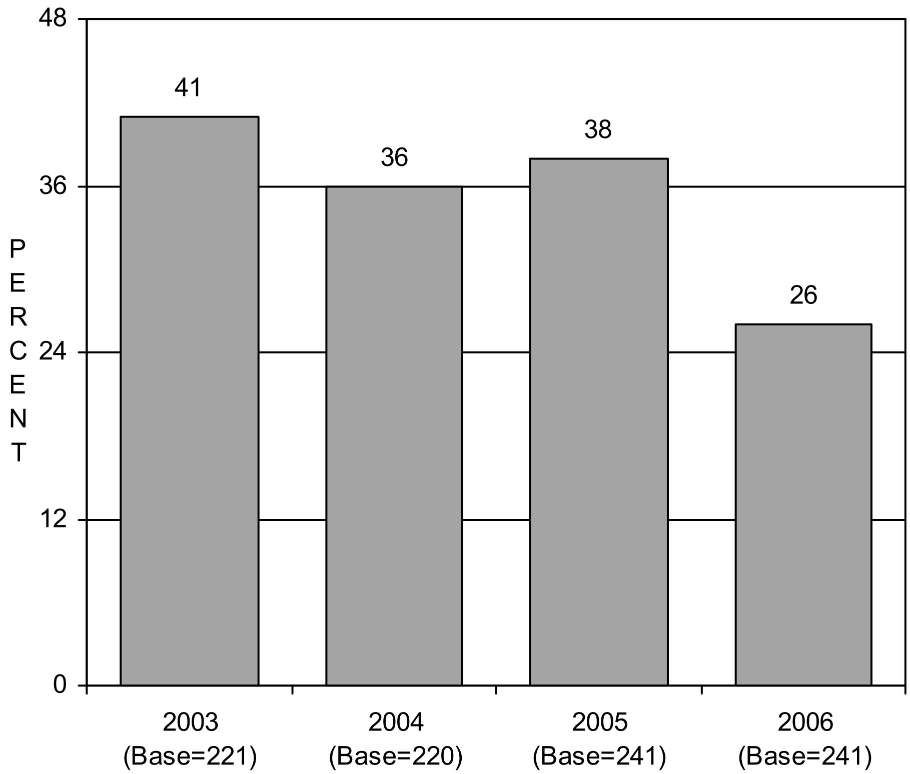


Two in ten Laughlin visitors (20%) said they had visited or were planning to visit Las Vegas on this trip (Figure 27).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only “yes” responses are reported in this chart.

FIGURE 28
Visiting Downtown Las Vegas*
(Among Those Who Visited Or Plan To Visit Las Vegas)



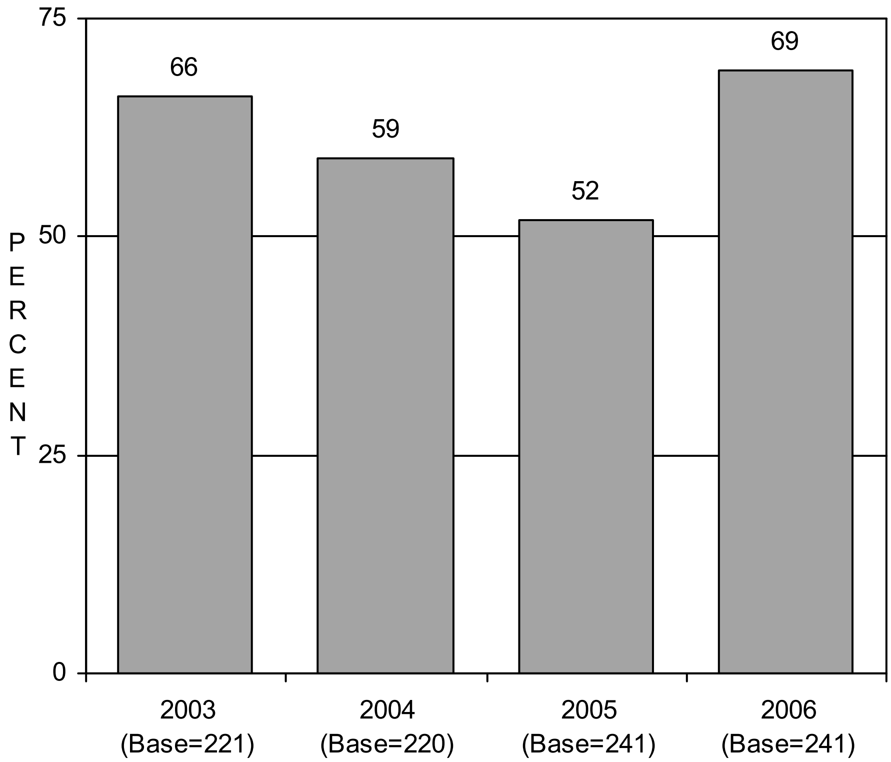
Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, 26% said they had visited or intended to visit Downtown, down from 41% in 2003, 36% in 2004, and 38% last year (Figure 28).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 29
Visiting The Las Vegas Strip*
(Among Those Who Visited Or Plan To Visit Las Vegas)

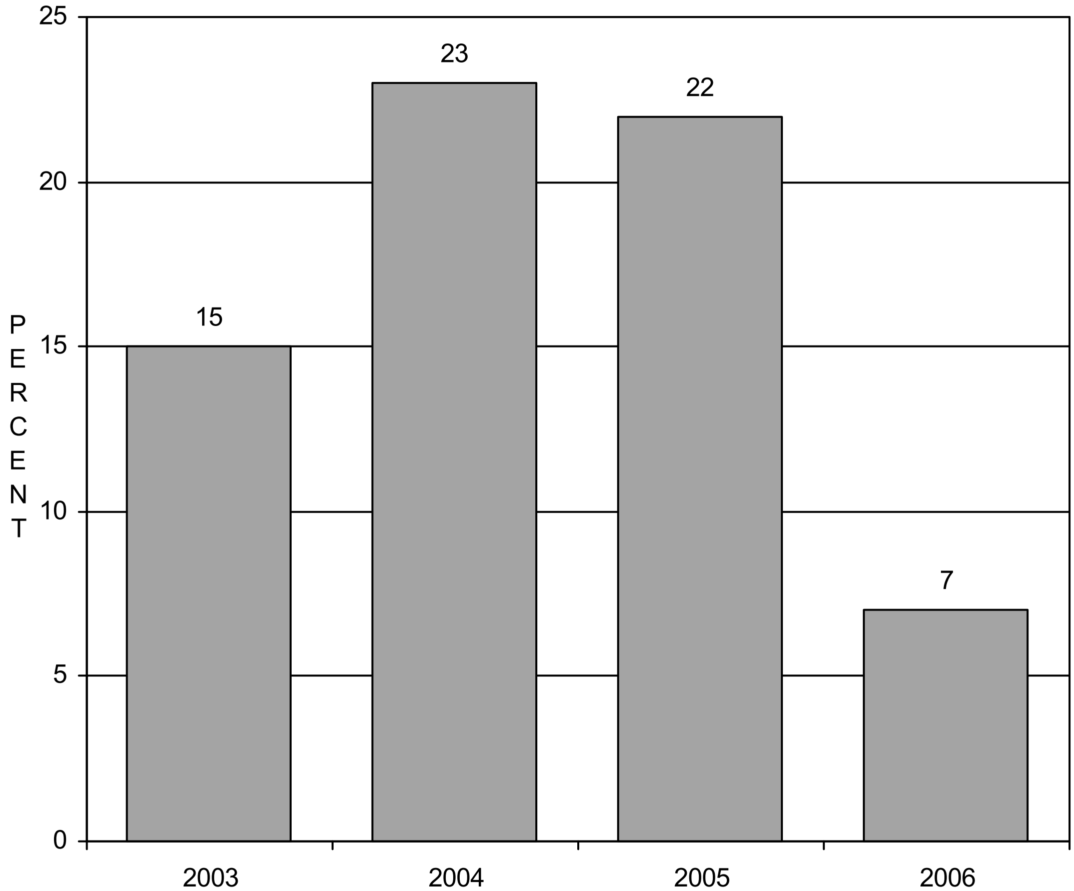


Among those who visited or planned to visit Las Vegas on this trip to Laughlin, 69% said they intended to visit the Strip, similar to 2003, but up from 59% in 2004 and 52% in 2005 (Figure 29).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 30
Touring Other Nearby Places*
(Among All Visitors)



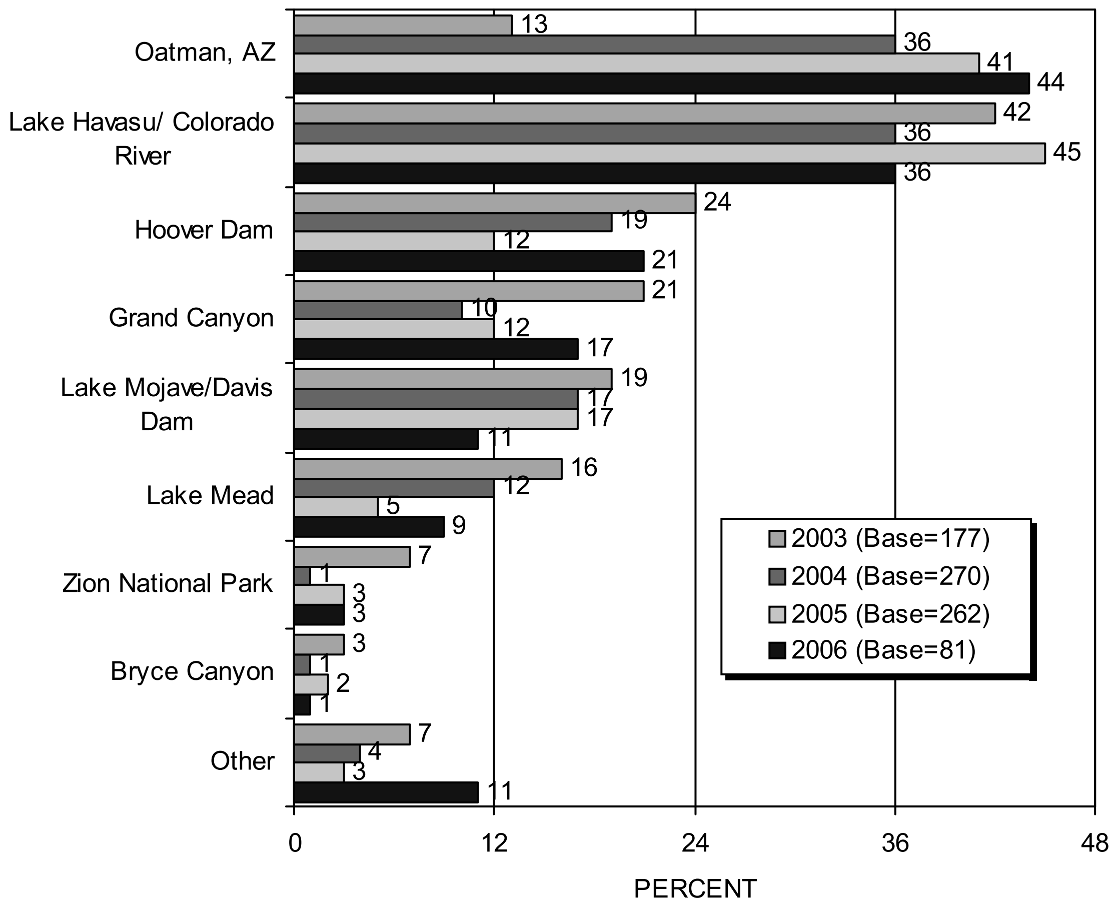
We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 30), and 7% said yes, down significantly from 15% in 2003, 23% in 2004, and 22% last year.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

FIGURE 31
Other Nearby Places Visited*
(Among Those Who Visited Nearby Places)



Laughlin visitors who said they visited nearby areas were most likely to have visited the Lake Havasu/Colorado River area (36%) and the ghost town of Oatman (44%, up from 13% in 2003), followed by Hoover Dam (21%), the Grand Canyon (17%), the Lake Mojave/Davis Dam area (11%), and Lake Mead (9%). Three percent (3%) visited Zion National Park, and 1% visited Bryce Canyon (Figure 31).

---

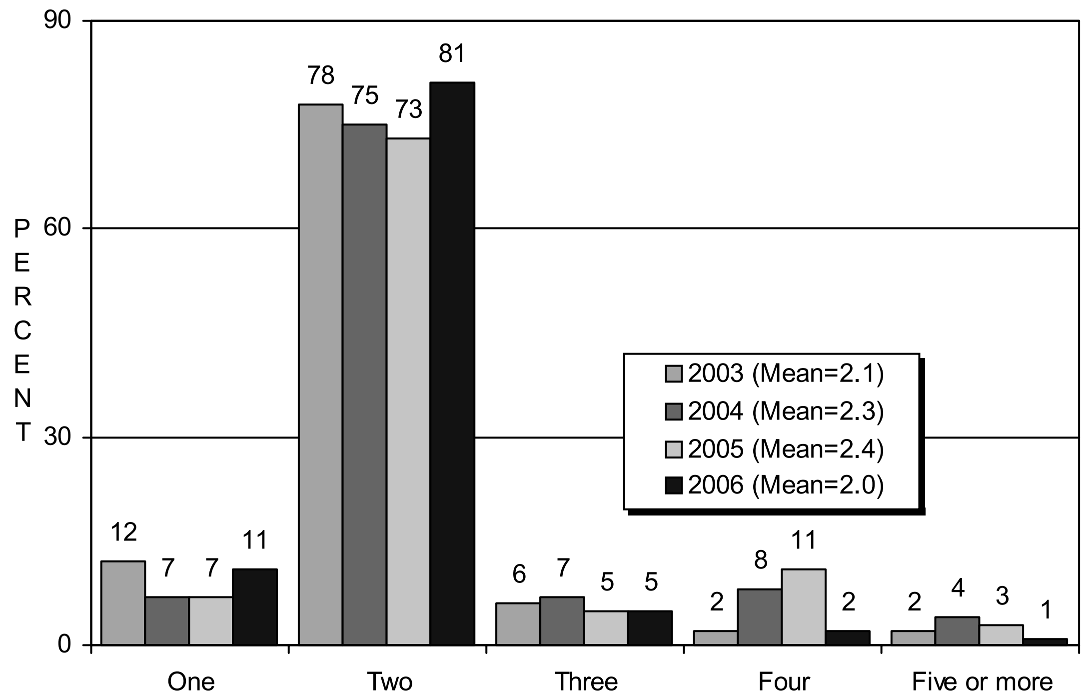
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Multiple responses were permitted to this question.

TRIP CHARACTERISTICS AND EXPENDITURES

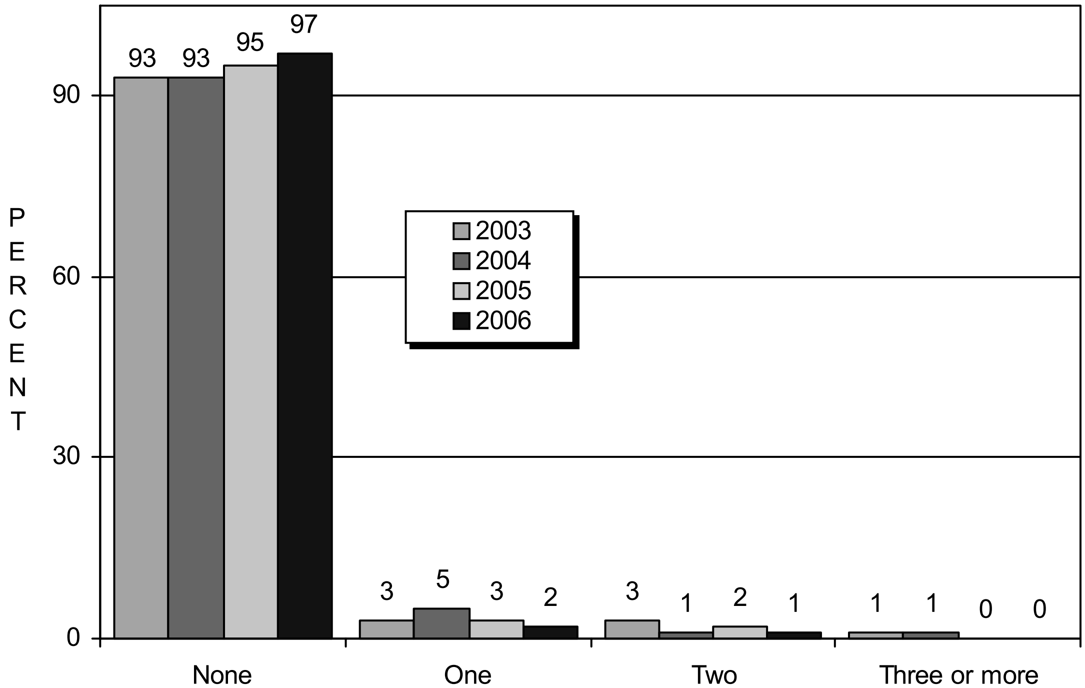
We asked visitors how many adults (21 years old or older) including themselves were in their immediate party (Figure 32). The majority (81%) reported two adults in their party, an increase from 75% in 2004 and 73% last year. Eleven percent (11%) said they were traveling alone, an increase from 7% each in 2004 and 2005. Three percent (3%) said they were traveling in a party of four or more people (down from 12% in 2004 and 14% in 2005). As a result of these decreases, the average number of adults decreased significantly from 2.3 in 2004 and 2.4 in 2005 to 2.0 (similar to 2003's figure of 2.1).

FIGURE 32
Adults In Immediate Party*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 33
Number Of Persons In Immediate Party Under Age 21*



We asked respondents how many people under 21 years old were in their immediate party (Figure 33). In 2006, the majority (97%) of respondents did not travel to Laughlin with anyone under 21 years old, up from 93% in 2003 and 2004, and 95% in 2005. Only 3% said their party included someone under the age of 21, down from 7% in 2003 and 2004, and 5% in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 34
Nights Stayed*

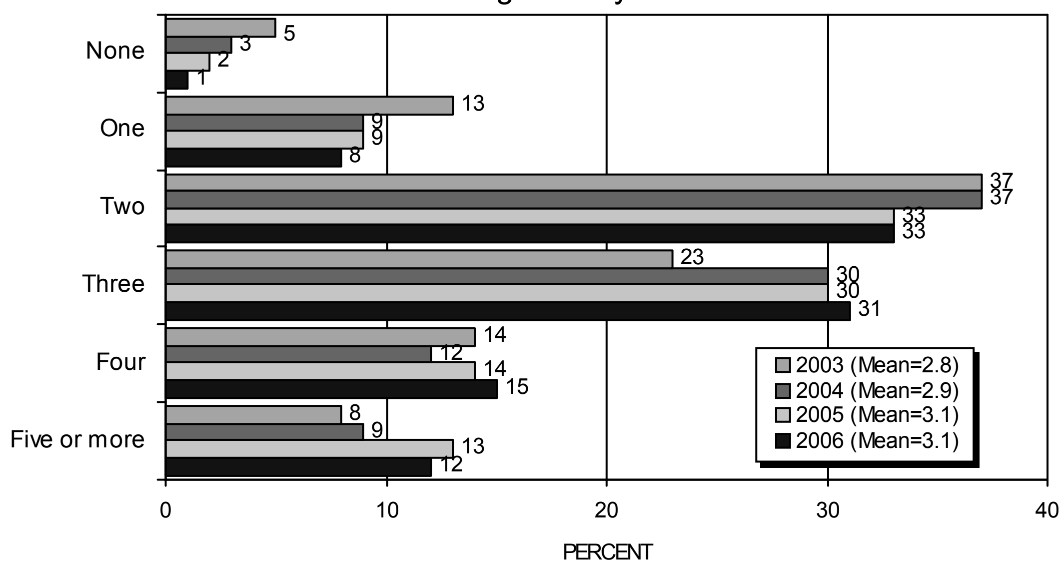
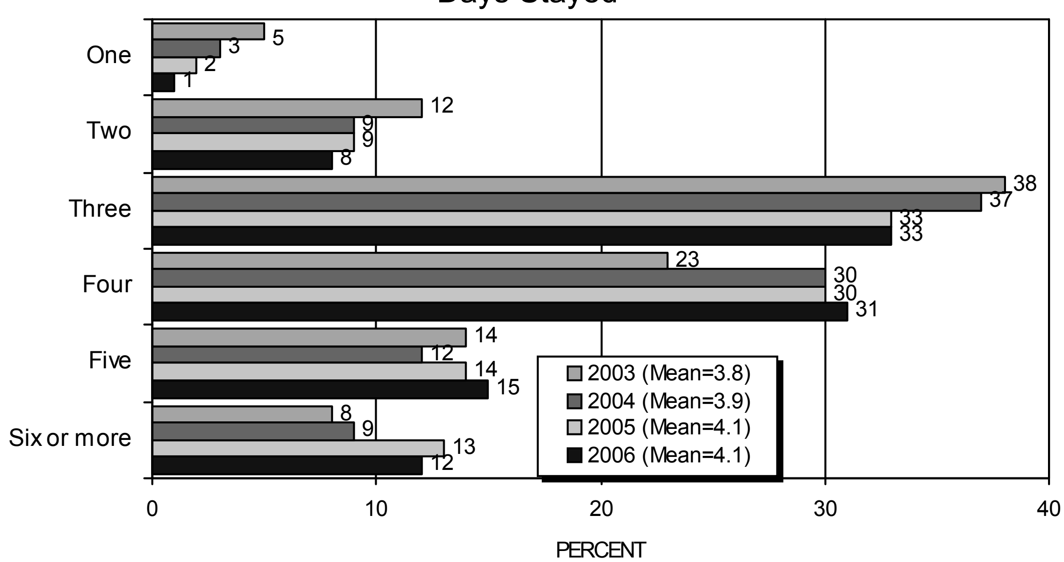


FIGURE 35
Days Stayed*

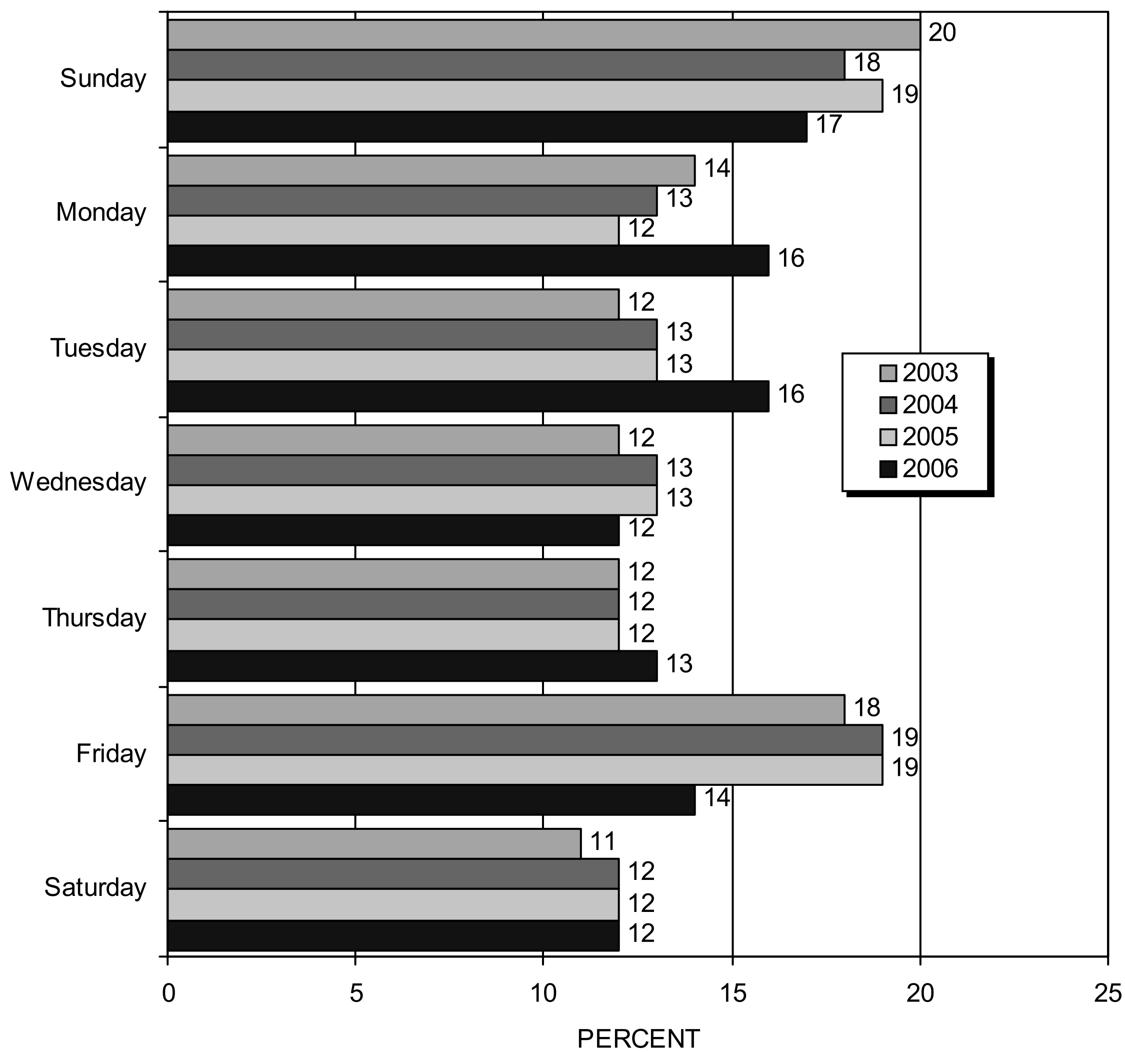


During 2006, Laughlin visitors stayed an average of 3.1 nights and 4.1 days, up from 2.8 nights and 3.8 days in 2003, and 2.9 nights and 3.9 days in 2004 (Figures 34 and 35).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 36
Day Of Arrival*

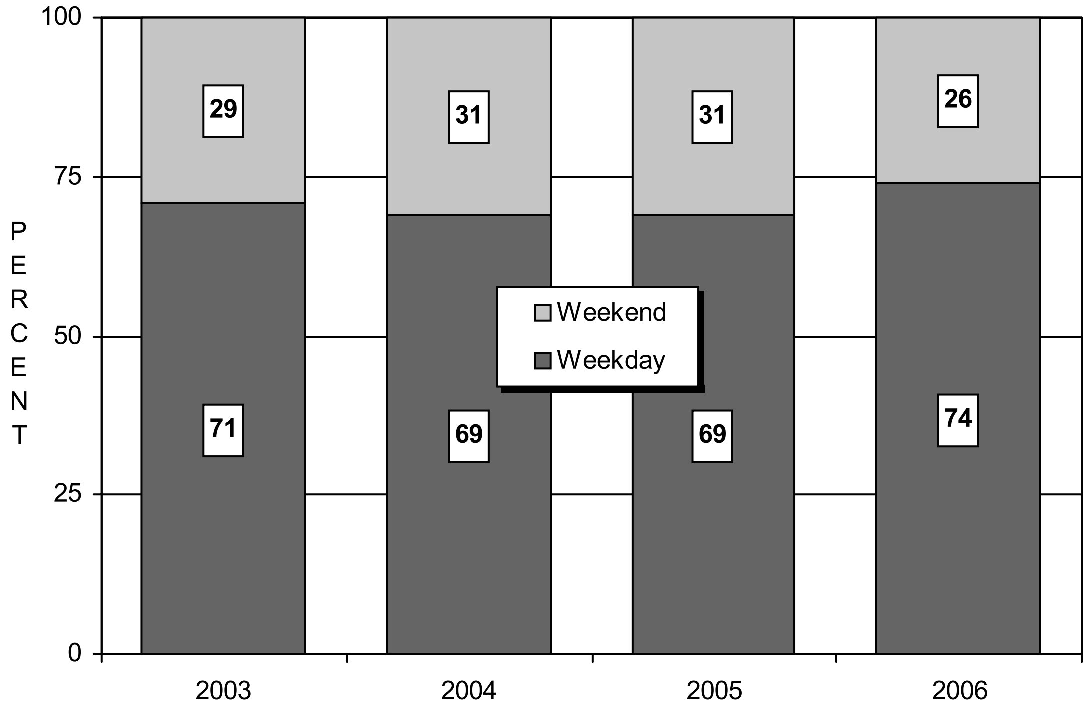


Visitors were most likely to arrive in Laughlin on a Sunday (17%), a Tuesday (16%, up from 12% in 2003, and 13% each in 2004 and 2005), or a Monday (16%, up from 12% last year) (Figure 36).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

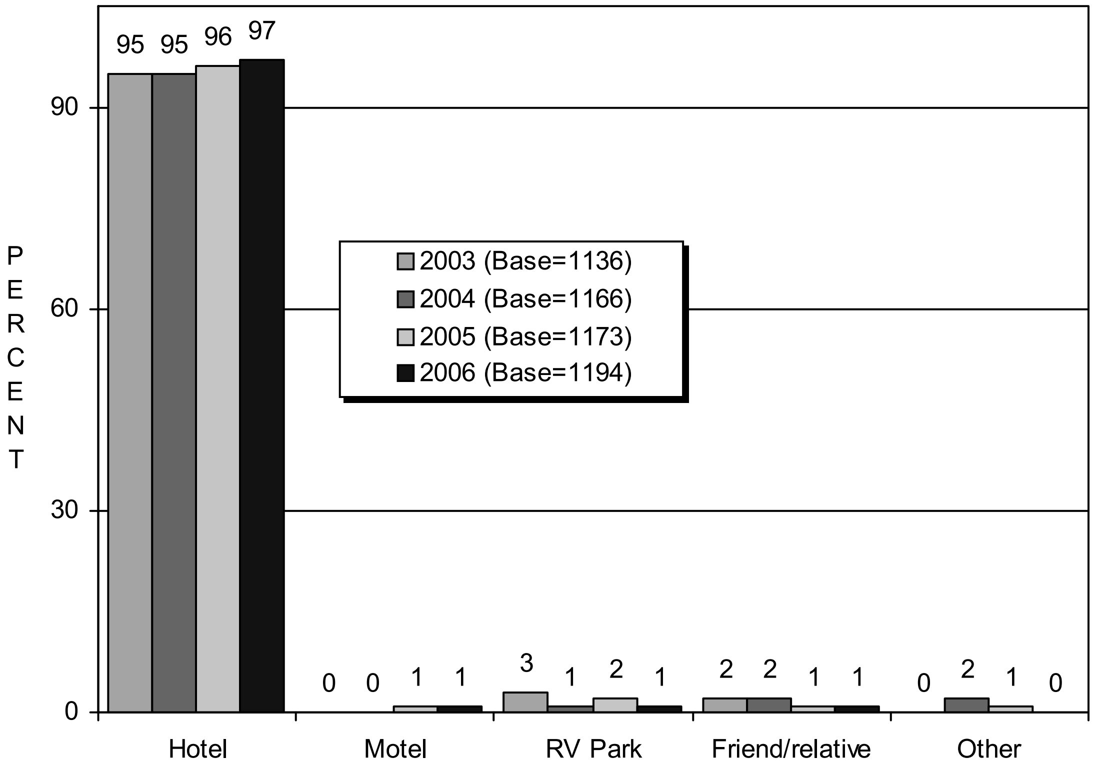
FIGURE 37
Weekend Versus Weekday Arrival*



The likelihood of arriving in Laughlin on a weekend (Friday or Saturday) was 26%, down from 31% each in 2004 and 2005. Seventy-four percent (74%) of visitors arrived in Laughlin between Sunday and Thursday, an increase from 69% each in 2004 and 2005(Figure 37).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 38
Type Of Lodging*
(Among Those Who Stayed Overnight)

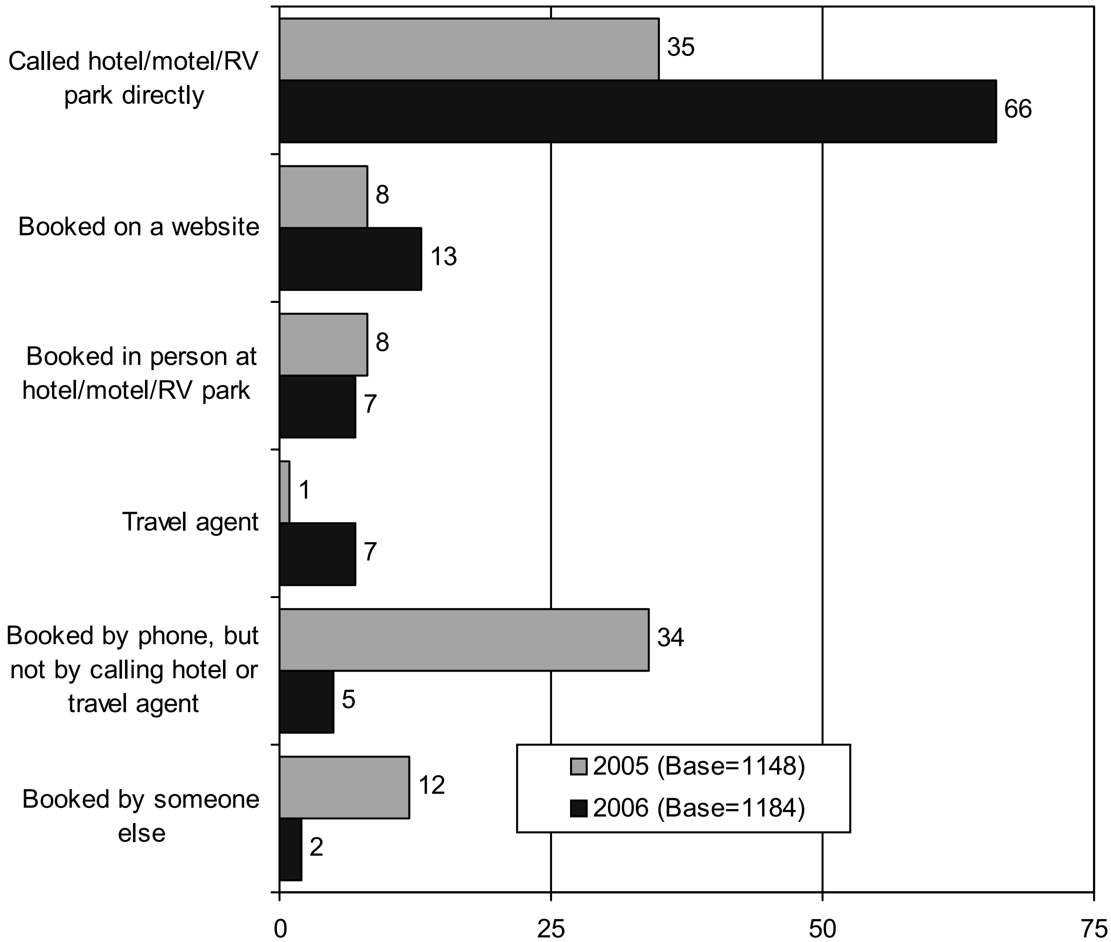


As shown in Figure 38, the proportion staying in hotels among visitors who stayed overnight was 97%, up from 95% in 2003 and 2004.

---

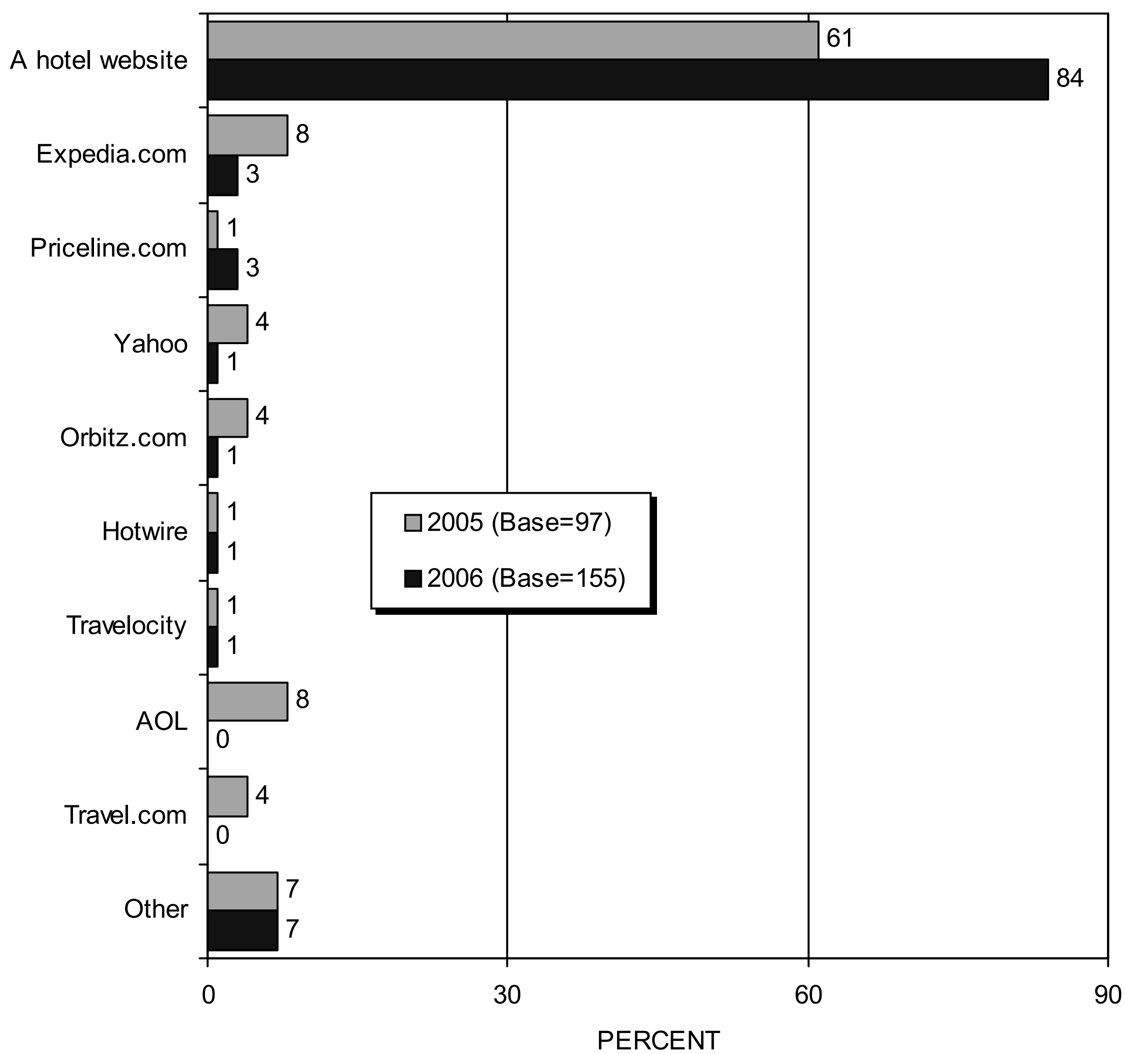
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 39
How Booked Accommodations
(Among Those Who Stayed in Hotel/Motel/RV Park)



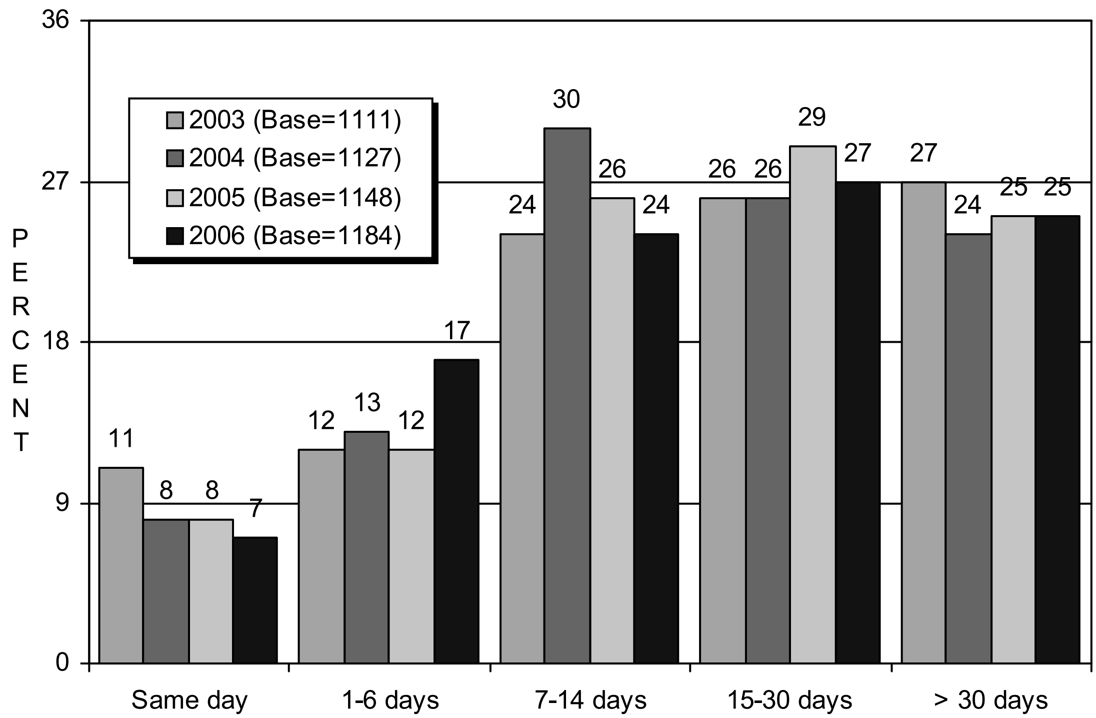
Beginning in 2005, visitors were asked how they booked their accommodations (Figure 39). This year two in three (66%) said they booked their accommodations by calling the property directly (an increase from 35% in 2005), 13% booked on a website (up from 8% in 2005), 7% each said they booked through a travel agent (up from 1% last year) or in person, and 5% said they booked by phone, but not by calling the hotel or a travel agent (a decrease from 34% last year). Two percent (2%) said someone else booked the accommodations, a decrease from 12% in 2005.

FIGURE 40
Website Used to Book Accommodations
(Among Those Who Booked Online)



Beginning in 2005, visitors who booked their accommodations on a web site were asked which website they used to book their accommodations. More than eight in ten (84%) said they used a hotel website to book their accommodations, an increase from 61% last year. Three percent each booked their accommodations through Expedia.com or Priceline.com, while other websites accounted for 1% or less each. (Figure 40).

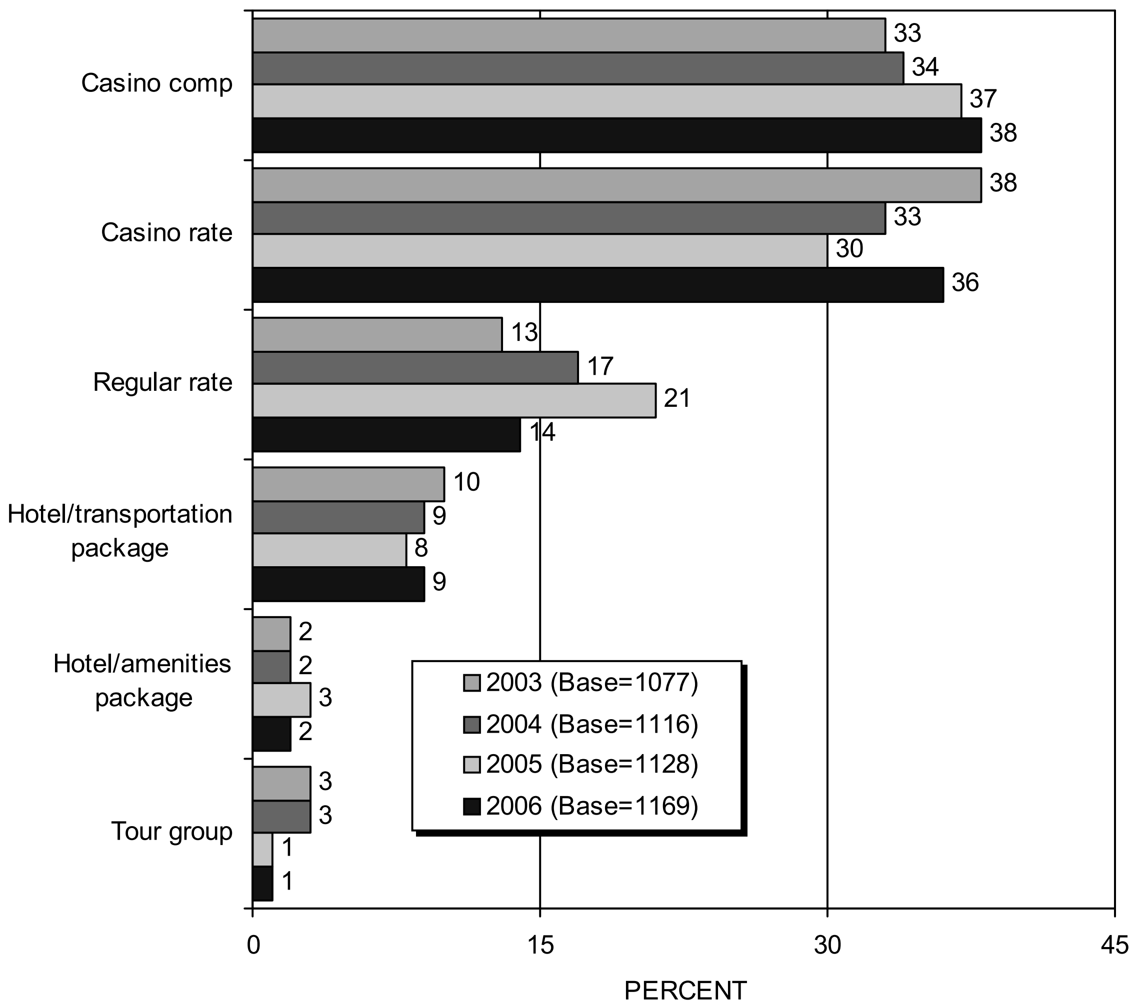
FIGURE 41
How Far In Advance Accommodations Were Booked*
(Among Those Staying In A Hotel/Motel/RV Park)



We asked those staying in a hotel, motel, or RV park how far in advance they had booked accommodations (Figure 41). Seven percent (7%) of visitors booked accommodations the same day (down from 11% in 2003), 17% booked one to six days in advance (up from 12% in 2003 and 2005 and 13% in 2004), 51% booked 7 to 30 days in advance (down from 56% in 2004 and 55% in 2005), and 25% booked more than 30 days in advance.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 42
Type Of Room Rate*
(Among Those Staying In A Hotel Or Motel)

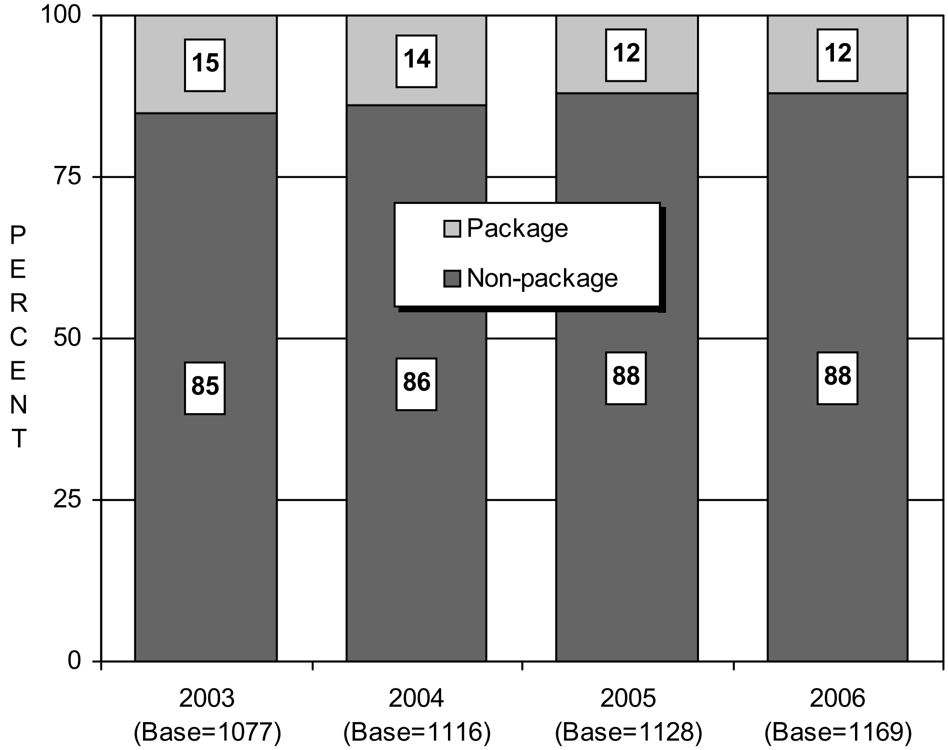


We asked those staying in a hotel or motel what type of room rate they had received for their accommodations (Figure 42). Thirty-eight percent (38%) said they received a casino complimentary rate (up from 33% in 2003), while the proportion mentioning a casino rate rose from 30% in 2005 to 36% currently. At the same time, the number of respondents who said they received a regular room rate (14%) was down significantly from 21% last year. Twelve percent (12%) received a package rate (down from 15% in 2003 and 14% in 2004).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

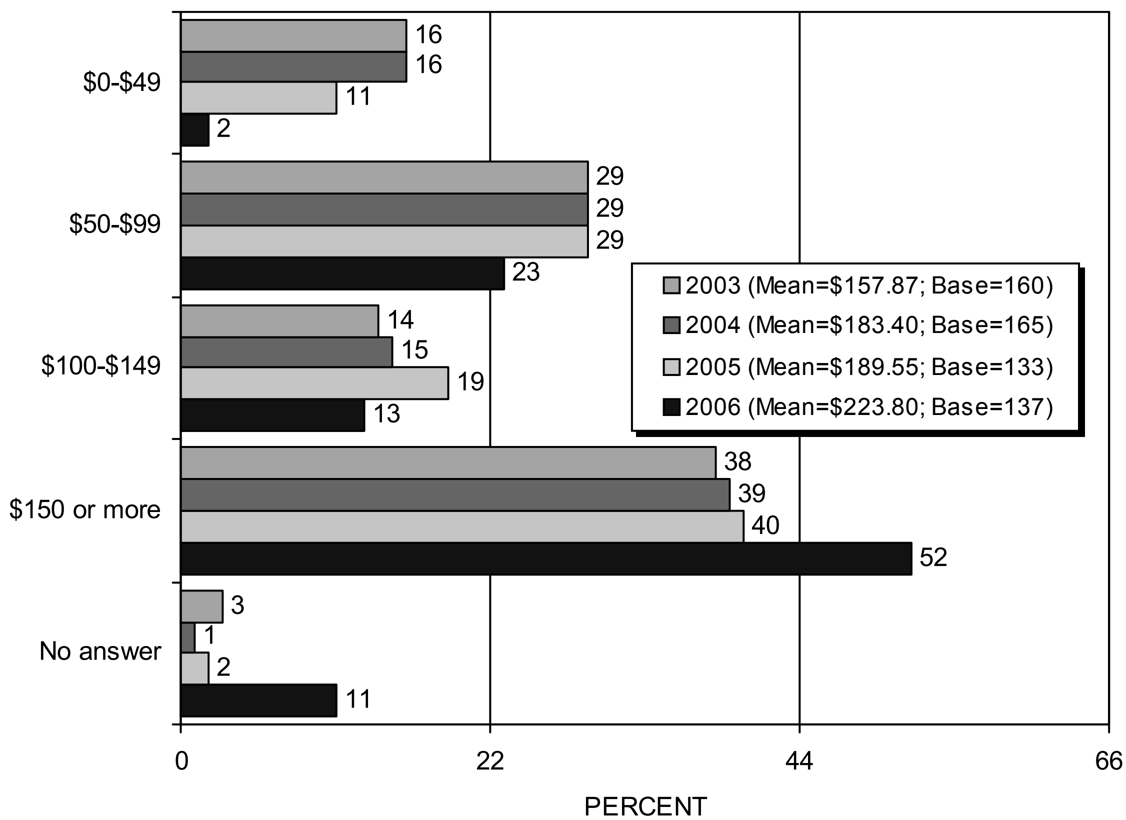
FIGURE 43
Package vs. Non-Package Rates*
(Among Those Staying In A Hotel Or Motel)



In 2006, 12% received their lodging as part of a package deal, down from 15% in 2003 and 14% in 2004 (Figure 43).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

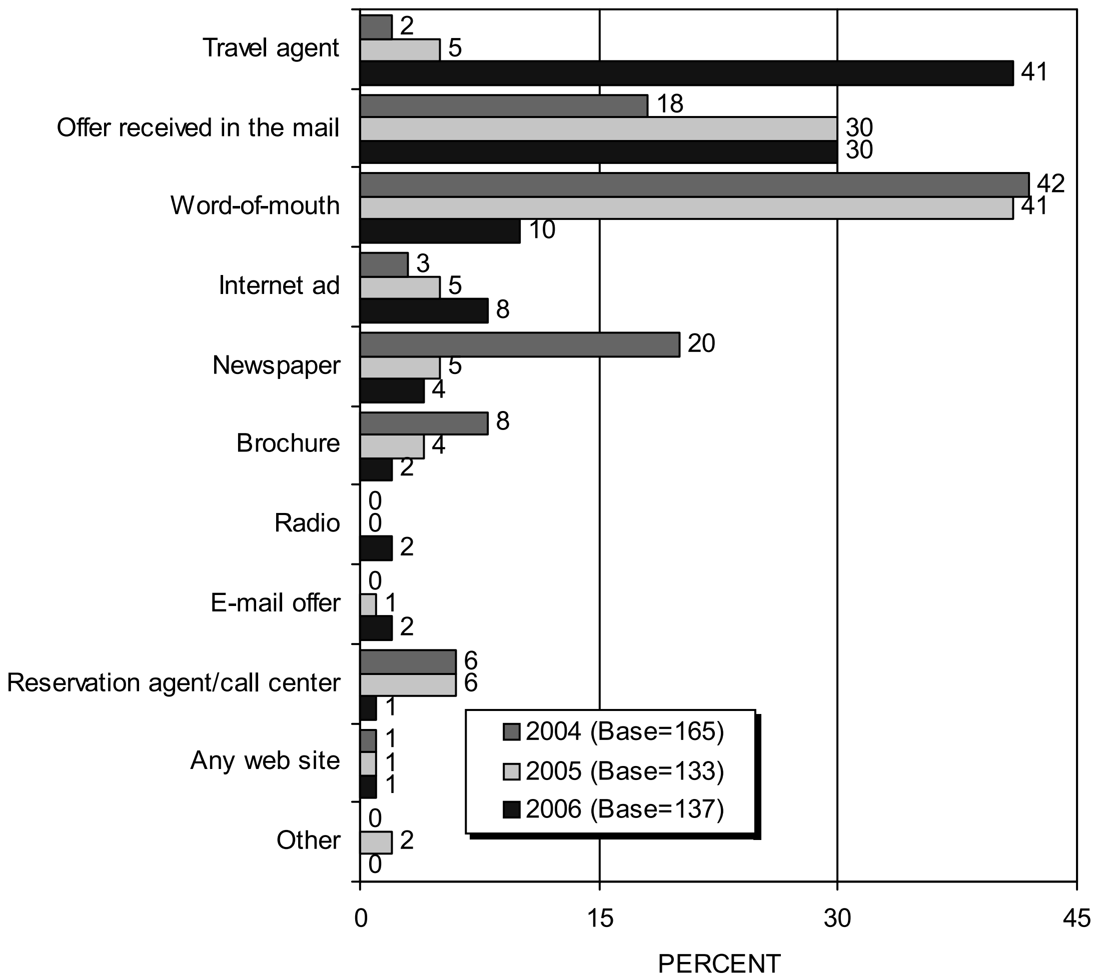
FIGURE 44
Cost Of Package — Per Person*
(Among Those Who Bought A Package)



We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 44). Five in ten (52%) said they paid $150 or more for their package, 13% paid $100 to $149, 23% paid $50 to $99, and 2% paid less than $50. The average package cost was $223.80, up considerably over prior years.

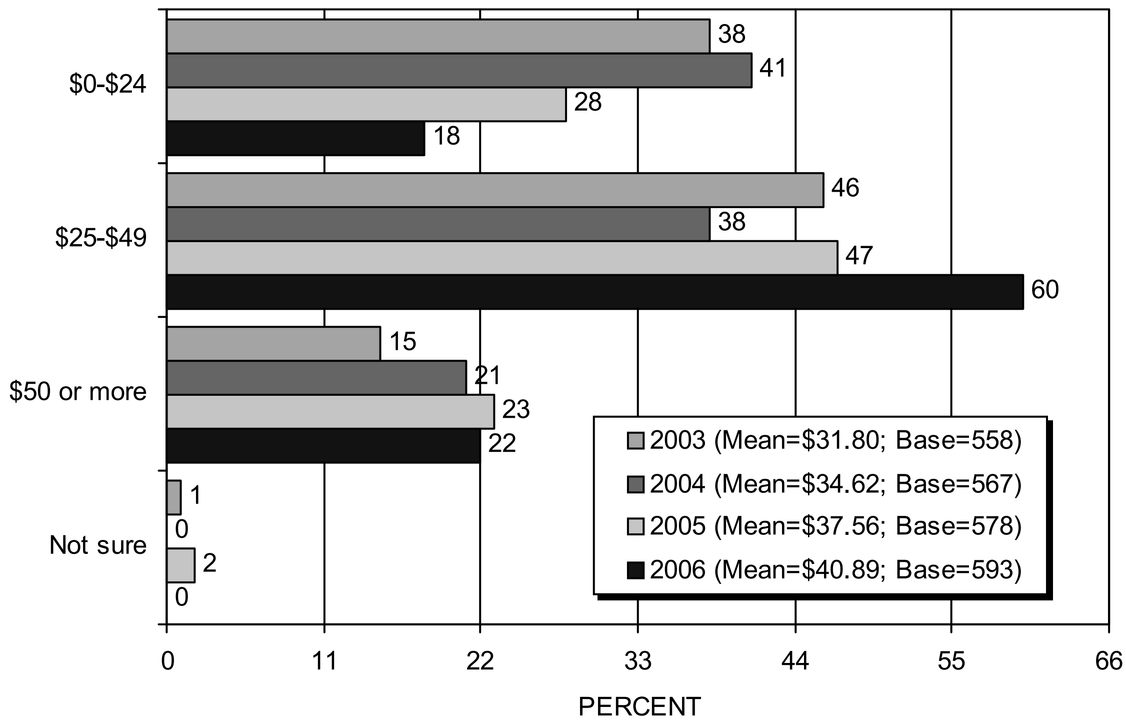
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 45
How First Learned About Package
(Among Those Who Bought A Package)



Starting in 2004, package purchasers were asked how they first found out about the package they bought for their trip to Laughlin (Figure 45). More than four in ten (41%, up from 5% in 2005 and 2% in 2004) said they first heard about the package through a travel agent. Three in ten (30%) said they received an offer through the mail, up from 18% in 2004. Ten percent (10%) heard about the offer through word-of-mouth, down from 42% in 2003 and 41% in 2004. Four percent (4%) saw it in the newspaper, down from 20% in 2004. Eight percent found out about their package through an internet ad, 2% each through a brochure (down from 8% in 2004) or an e-mail offer. Only 1% said they found out about the package through a call center, down from 6% each in 2004 and 2005.

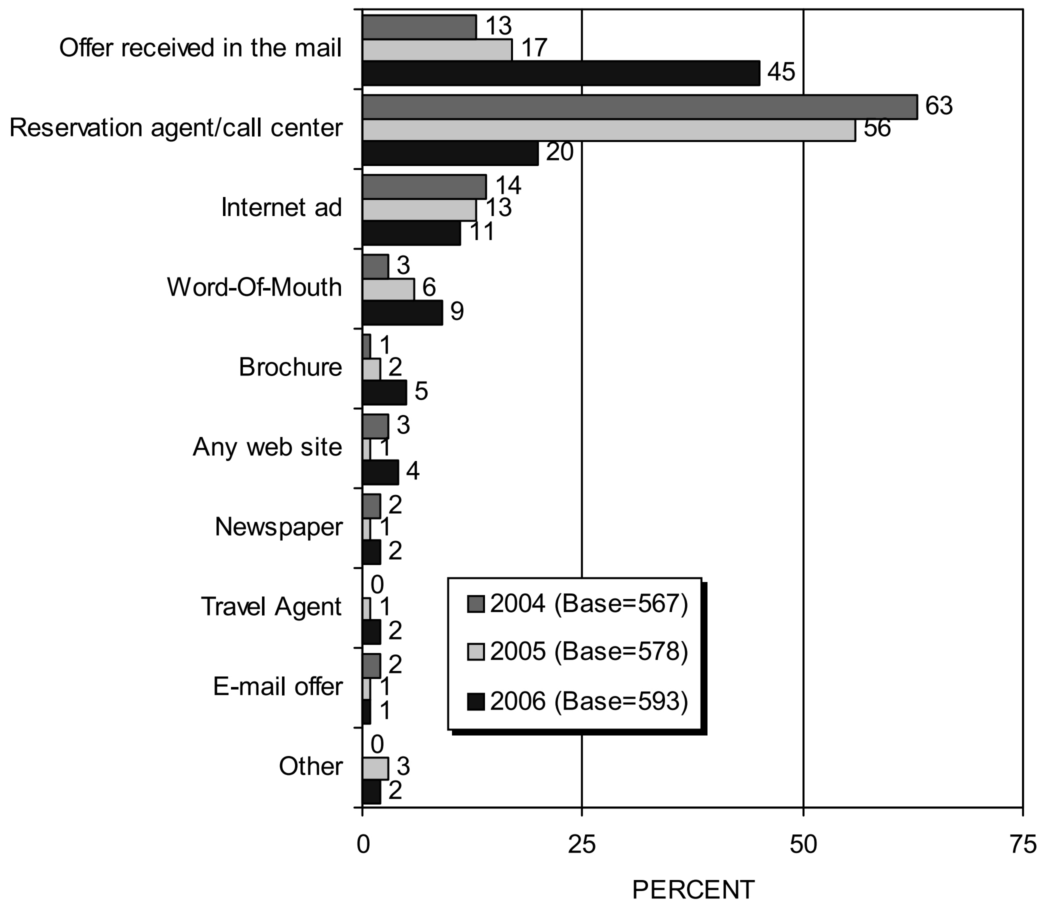
FIGURE 46
Lodging Expenditures — Average Per Night*
(Among Those Staying In A Hotel Or Motel/Non-Package)



The average reported room cost among non-package hotel and motel lodgers in 2006 was $40.89, up significantly from $31.80 in 2003, $34.62 in 2004, and $37.56 in 2005 (Figure 46). The proportion of visitors paying $50 or more for their room increased from 15% in 2003 to 22% in 2006.

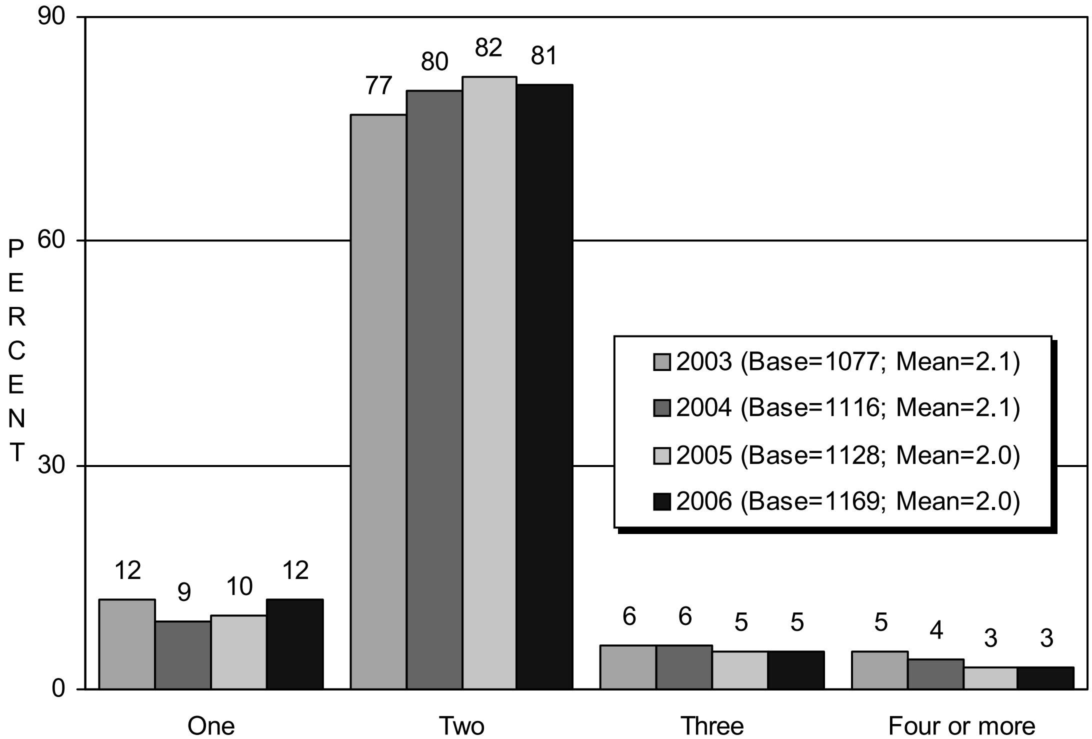
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 47
How First Learned About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



Starting in 2004, non-package hotel and motel lodgers were asked how they first found out about the room rate they paid (Figure 47). Forty-five percent (45%) said they received an offer in the mail, an increase from 13% in 2004, and 17% last year. One in five (20%) said they first heard of their room rate from a reservation agent or through a call center, down from 63% in 2004 and 56% in 2005. Eleven percent (11%) saw an advertisement on the Internet, and 9% said they said they heard about it through word of mouth (an increase from 3% in 2004). Five percent (5%) heard about the rate from a brochure (up from 1% in 2004 and 2% in 2005), 4% from a website (up from 1% in 2005), 2% from a newspaper, 2% heard about the rate they paid from a travel agent, and 1% from an email offer.

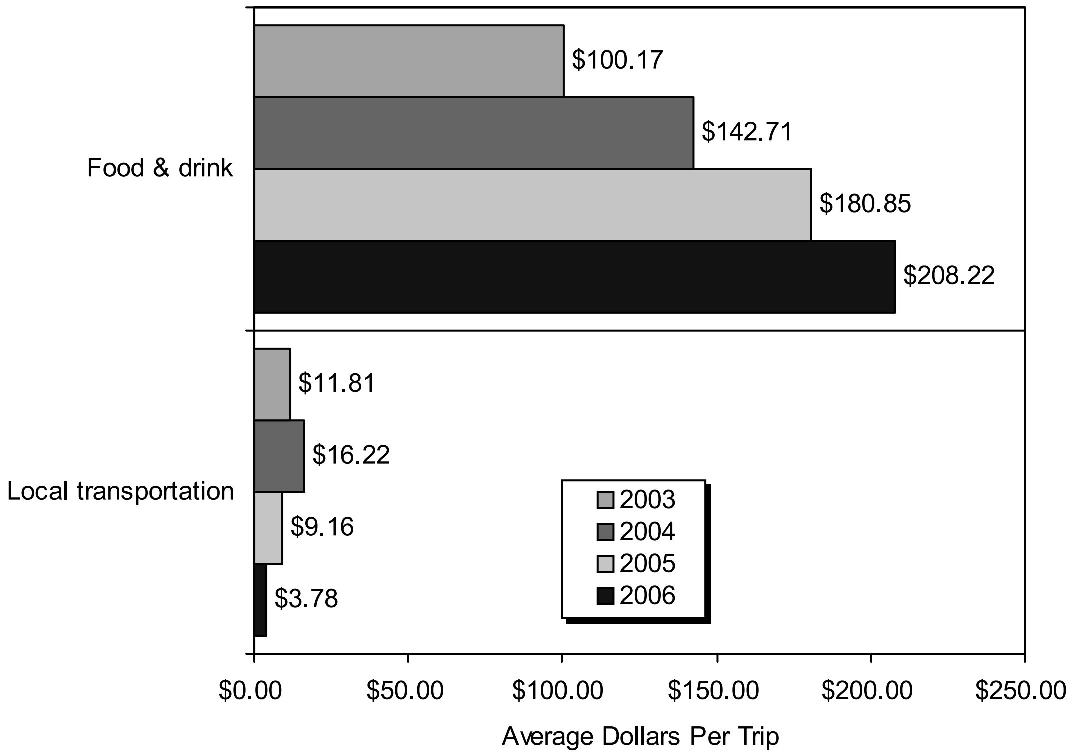
FIGURE 48
Number Of Room Occupants*
(Among Those Staying In A Hotel Or Motel)



As Figure 48 shows, the majority of visitors (81% in 2006) said that two people stayed in their room. The average number of room occupants per hotel/motel room was 2.0 occupants.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 49
Average Trip Expenditures On Food & Drink —
And Local Transportation*
(Including Visitors Who Spent Nothing In That Category)



We asked all visitors about their daily expenditures on food and drink and on local transportation.

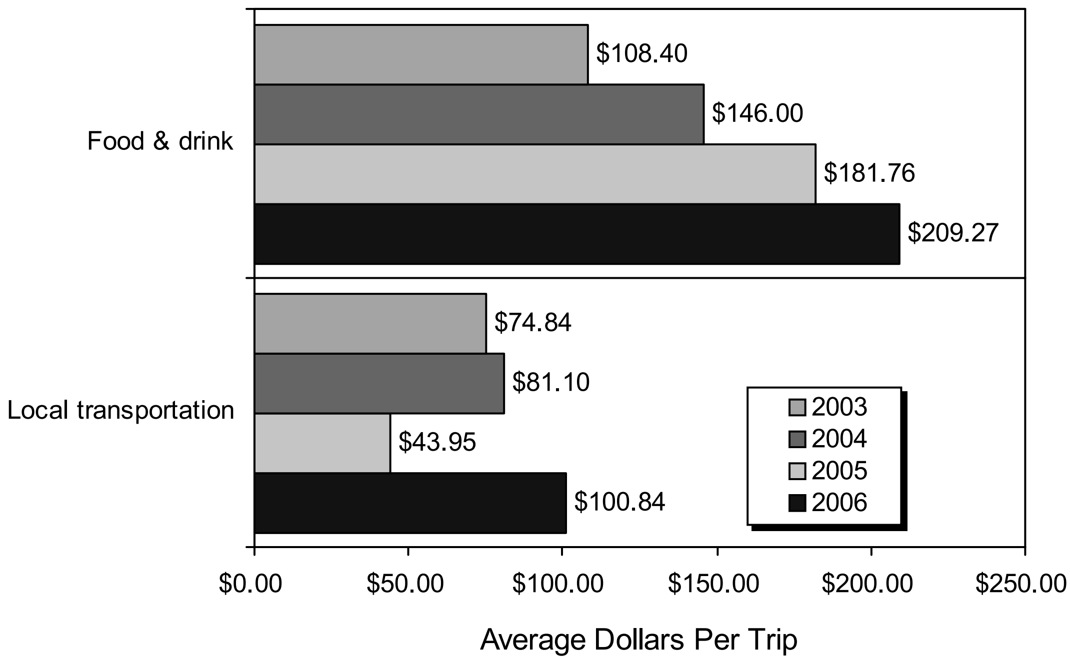
Figure 49 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In the current study, the average food and drink expenditure was $208.22 per trip, up significantly from $180.85 in 2005, $142.71 in 2004, and $100.17 in 2003. The average local transportation expenditure was $3.78 per trip, down from $9.16. in 2005, $16.22 in 2004, and $11.81 in 2003.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Trip expenditures are calculated by multiplying respondents' estimated daily expenditures by the number of days they stayed in Laughlin on their most recent trip.

FIGURE 50
Average Trip Expenditures On Food & Drink — And Local Transportation*
(Among Those Who Spent Money In That Category)



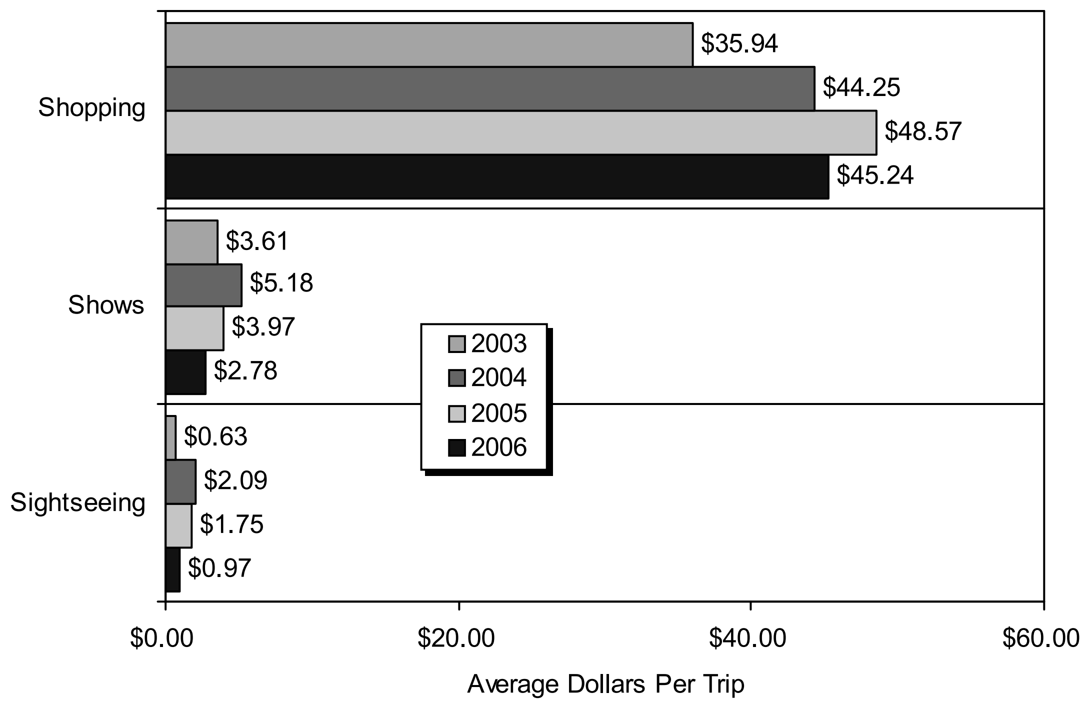
Among visitors who indicated they spent money in these categories, average food and drink expenditures in the current study were $209.27 per trip, up significantly from $181.76 in 2005, $146.00 in 2004, and $108.40 in 2003 (Figure 50). Average local transportation expenditures were $100.84 per trip, up from $43.95 in 2005.

Percentages of respondents who spent money in each category are shown in the following table:

	2003	2004	2005	2006
Food and drink				
Base size	(1108)	(1173)	(1194)	(1194)
Proportion of total	92%	98%	99.5%	99.5%
Local transportation				
Base size	(190)	(240)	(250)	(45)
Proportion of total	16%	20%	21%	4%

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

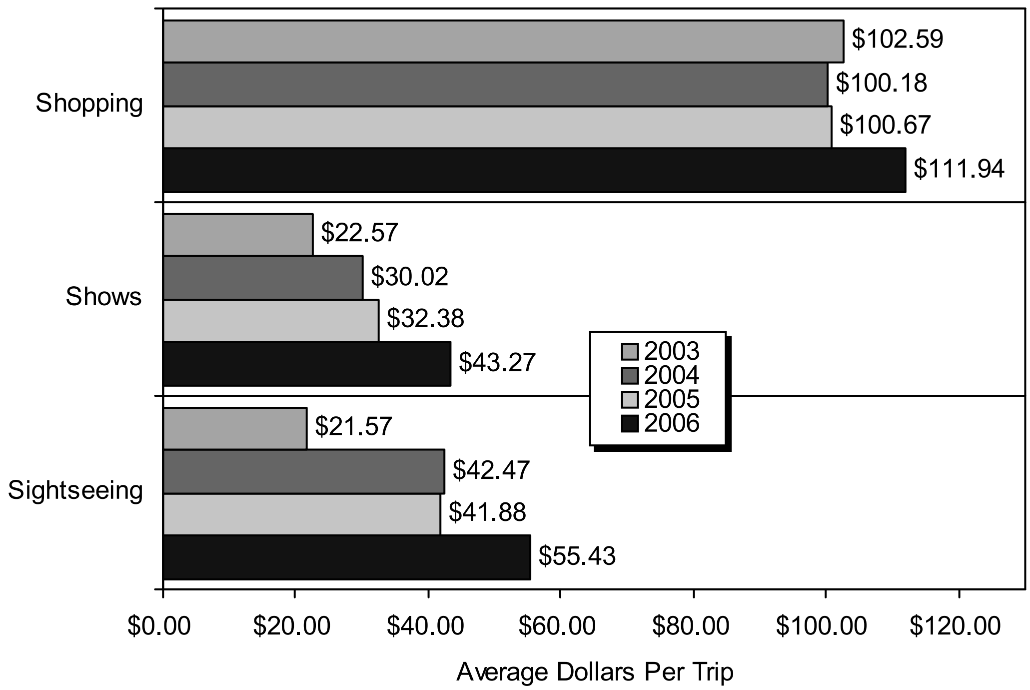
FIGURE 51
Average Trip Expenditures On Shopping, Shows, And Sightseeing*
(Including Visitors Who Spent Nothing In That Category)



We asked all visitors about the amount of money they spent on shopping, shows, and sightseeing during their visit to Laughlin. Figure 51 shows these average expenditures *including visitors who said they spent nothing in each category*. The average total spent on shopping in 2006 was $45.24, up from $35.94 in 2003. An average of $2.78 was spent on shows (down from $5.18 in 2004 and $3.97 in 2005), and an average of $0.97 was spent on sightseeing (a decrease from $2.09 in 2004).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 52
Average Trip Expenditures On Shopping, Shows, And Sightseeing*
(Among Those Who Spent Money In That Category)



Looking only at visitors who spent money in that category, the average spent for shopping in 2006 was $111.94, about the same as in past years (Figure 52). The average spent on shows was $43.27, up from $32.38 in 2005, $30.02 in 2004, and $22.57 in 2003. The average spent on sightseeing was $55.43, up from $21.57 in 2003.

Percentages of respondents who spent money in each category are shown in the following table:

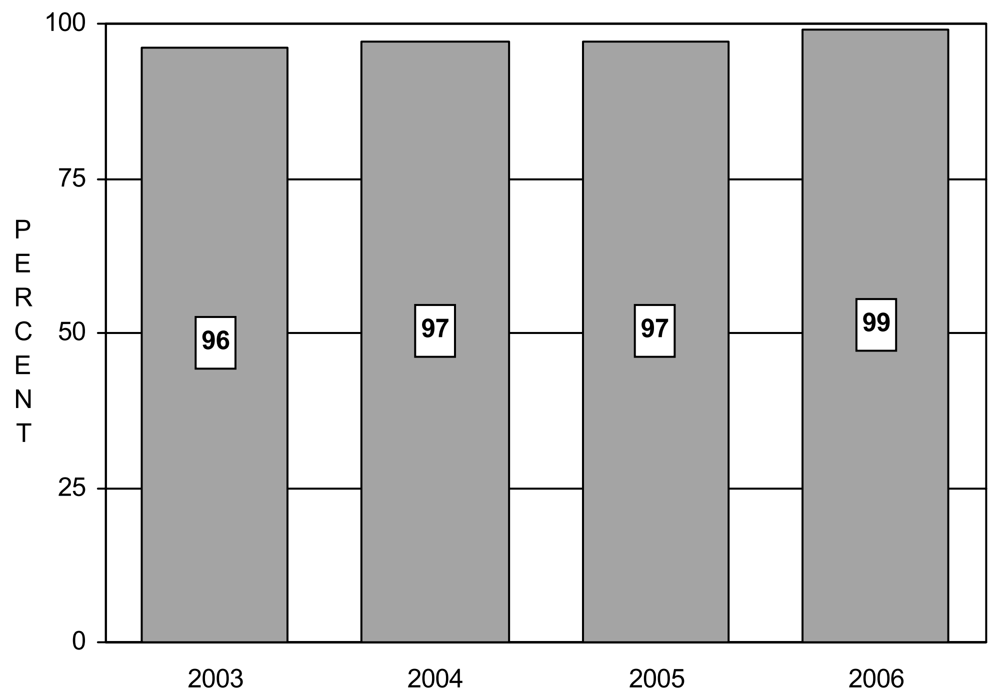
	2003	2004	2005	2006
Shopping				
Base size	(420)	(530)	(579)	(485)
Proportion of total	35%	44%	48%	40%
Shows				
Base size	(192)	(207)	(147)	(77)
Proportion of total	16%	17%	12%	6%
Sightseeing				
Base size	(35)	(59)	(50)	(21)
Proportion of total	3%	5%	4%	2%

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

GAMING BEHAVIOR AND BUDGETS

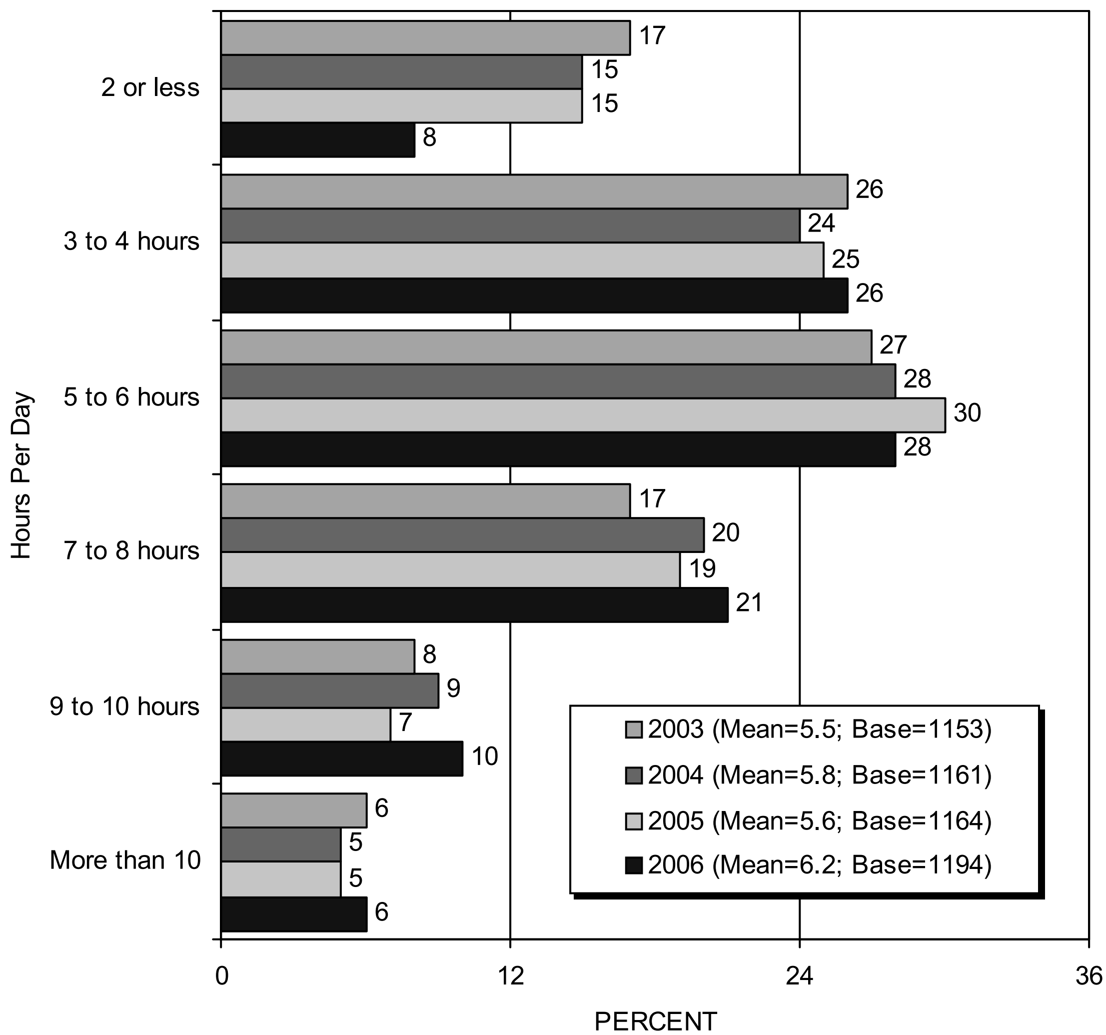
The number of Laughlin visitors in the current study who said they gambled on their trip to Laughlin was 99%, an increase from 96% in 2003 and 97% each in 2004 and 2005 (Figure 53).

FIGURE 53
Whether Gambled While In Laughlin*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 54
Hours Of Gambling — Average Per Day*
(Among Those Who Gambled)

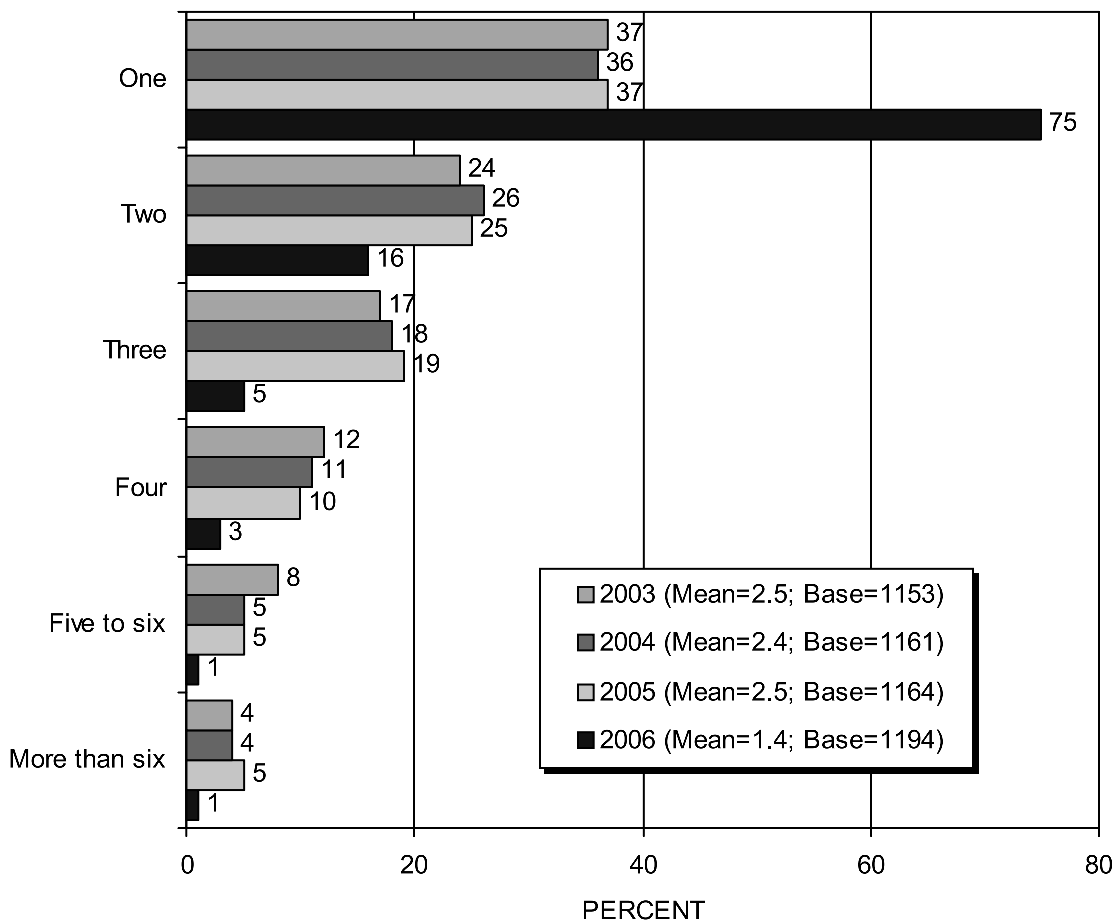


In 2006, Laughlin visitors said they spent an average of 6.2 hours a day gambling, an increase from 5.5 hours in 2003, 5.8 hours in 2004, and 5.6 hours last year (Figure 54).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

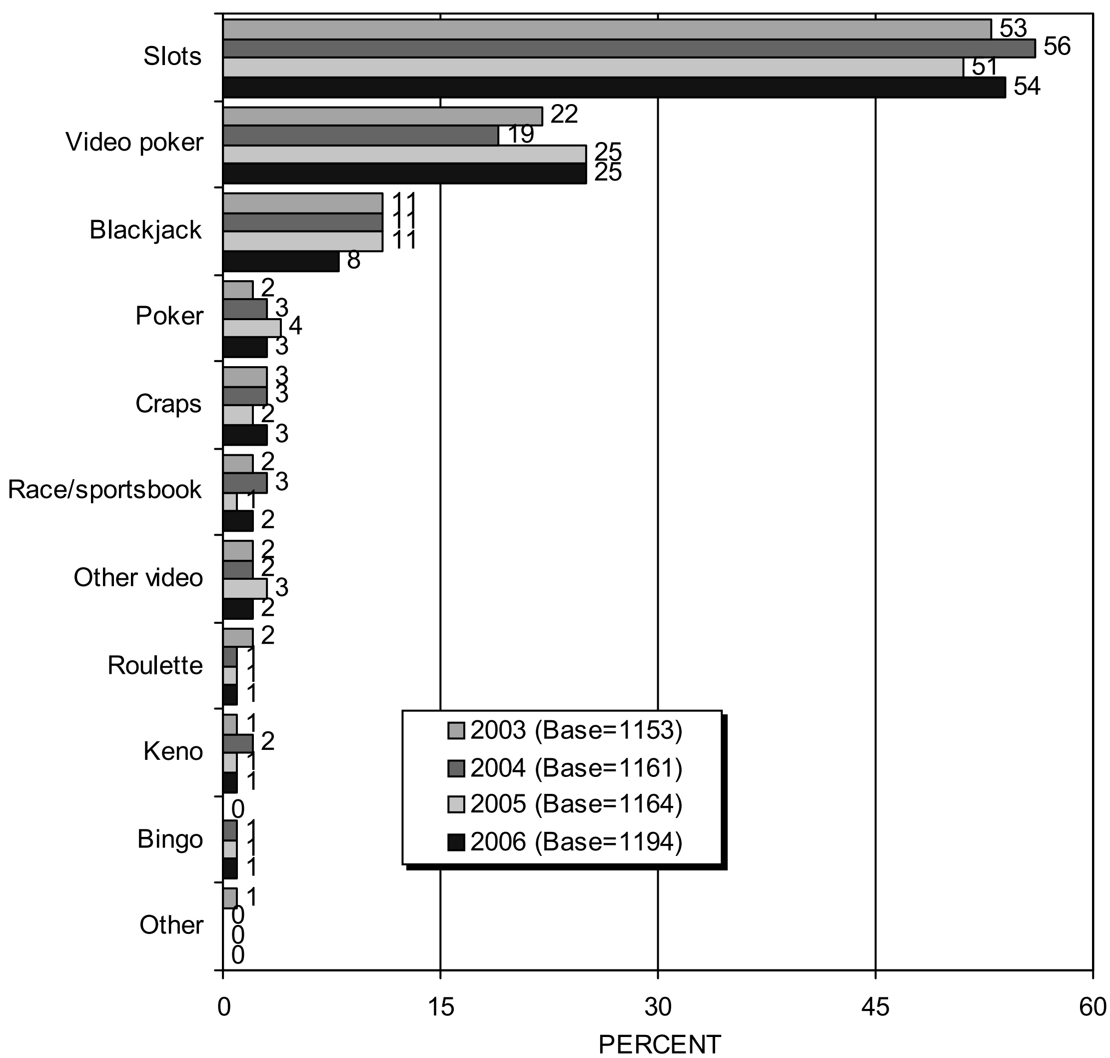
FIGURE 55
Number Of Different Casinos Visited*
(Among Those Who Gambled)



Gamblers reported visiting an average of 1.4 casinos in 2006, a significant decrease from past years (Figure 55). Three quarters (75%) of visitors reported visiting only 1 casino (more than double past years' totals), accounting for the decline.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 56
Casino Game Played Most Often*
(Among Those Who Gambled)



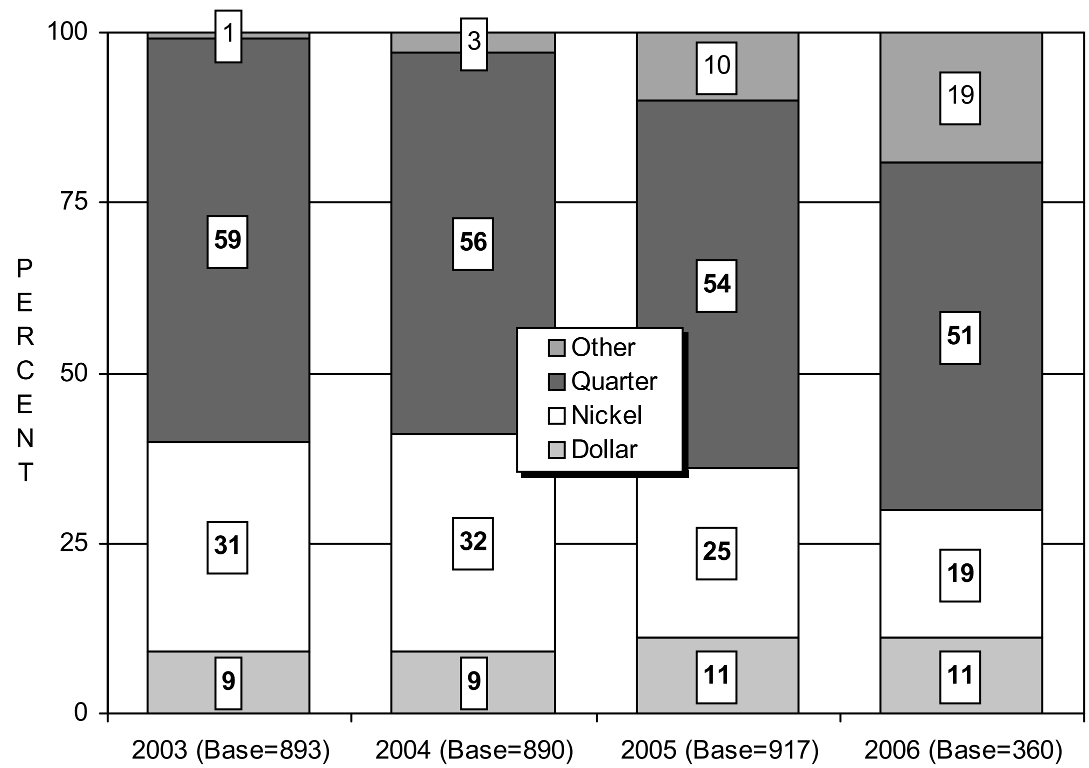
As Figure 56 shows, 54% of gamblers in 2006 played slot machines most often. Twenty-five percent (25%) said they played video poker machines (up from 19% in 2004), followed by 8% who said blackjack (down from 11% each from 2003 to 2005). Three percent (3%) each played poker or craps most often. All other games combined account for the remainder.

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Percentages do not add to 100% because of rounding.

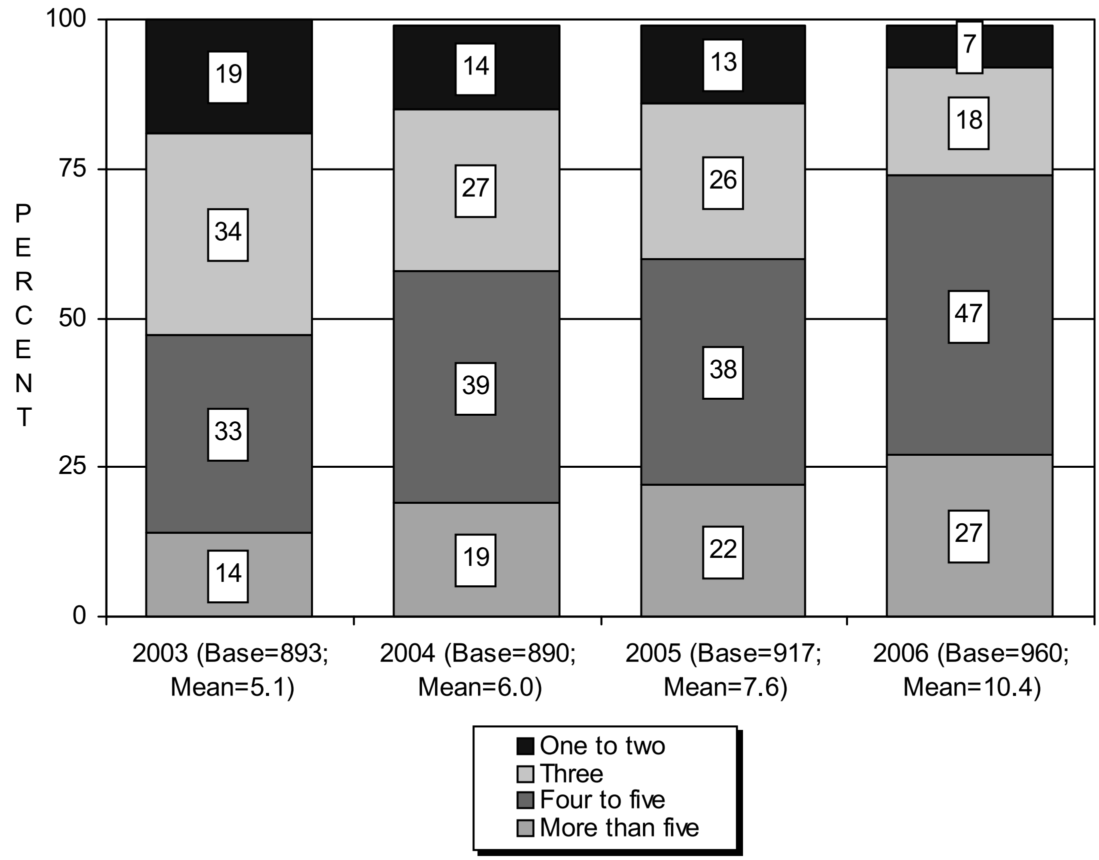
FIGURE 57
Machine Denomination Played Most Often*
(Among Those Who Played Slot And Video Machines)



Among those who played slot and video machines in 2006, 51% played quarter machines most often (down from 59% in 2003 and 56% in 2004), 19% played nickel machines most often (down from 31% in 2003, 32% in 2004, and 25% in 2005), and 11% played dollar machines most often (Figure 57). The decrease in play for nickel and quarter machines can be traced to an increase (from 1% in 2003, 3% in 2004, and 10% in 2005, to 19% in 2006) in those who played “other” denominations, generally penny machines with a high number of tokens per play.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 58
Average Coins/Tokens For Each Play*
(Among Those Who Played Slot And Video Machines)



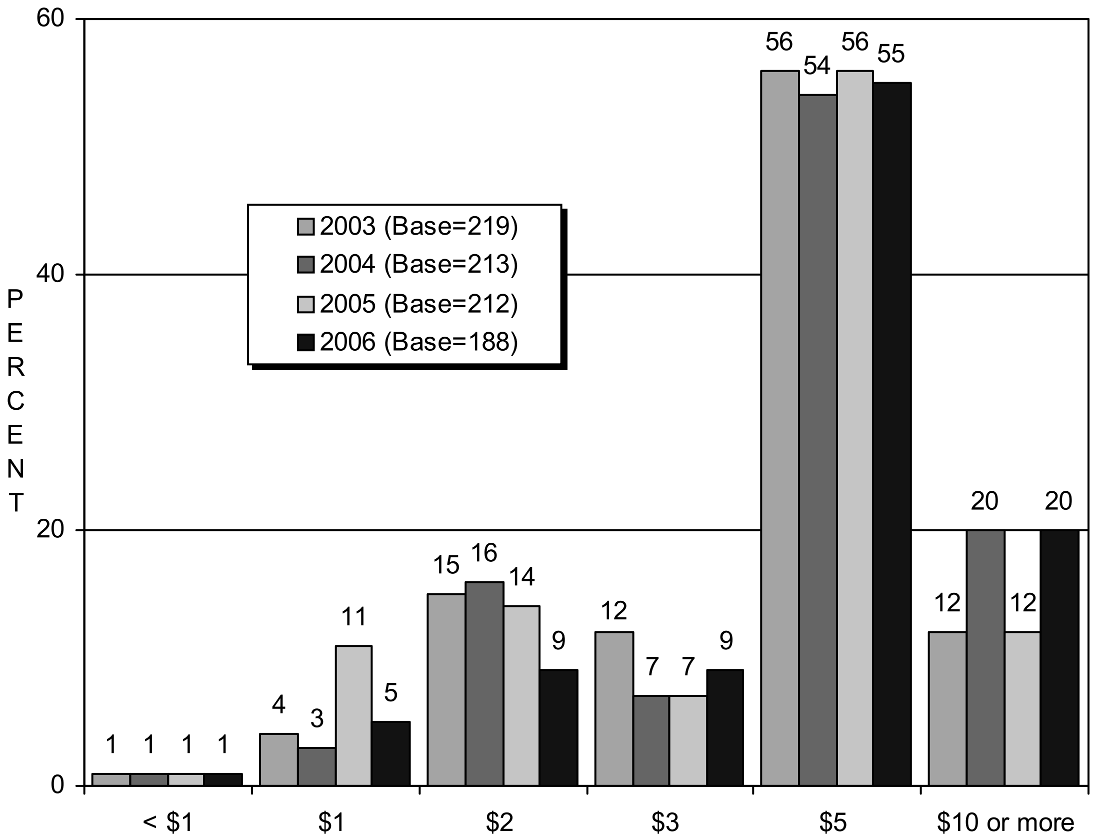
Visitors who played slot and video machines were asked, on average, how many coins or tokens they usually insert before each play on a machine (Figure 58). The average number of coins or tokens per play was 10.4, up significantly from the average of 5.1 in 2003, 6.0 in 2004, and 7.6 in 2005. The increase is due to the fact that gamblers were significantly more likely to report inserting four or more coins per play (74%) than they did in 2003 (47%).

---

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Percentages may not add to 100% because of rounding.

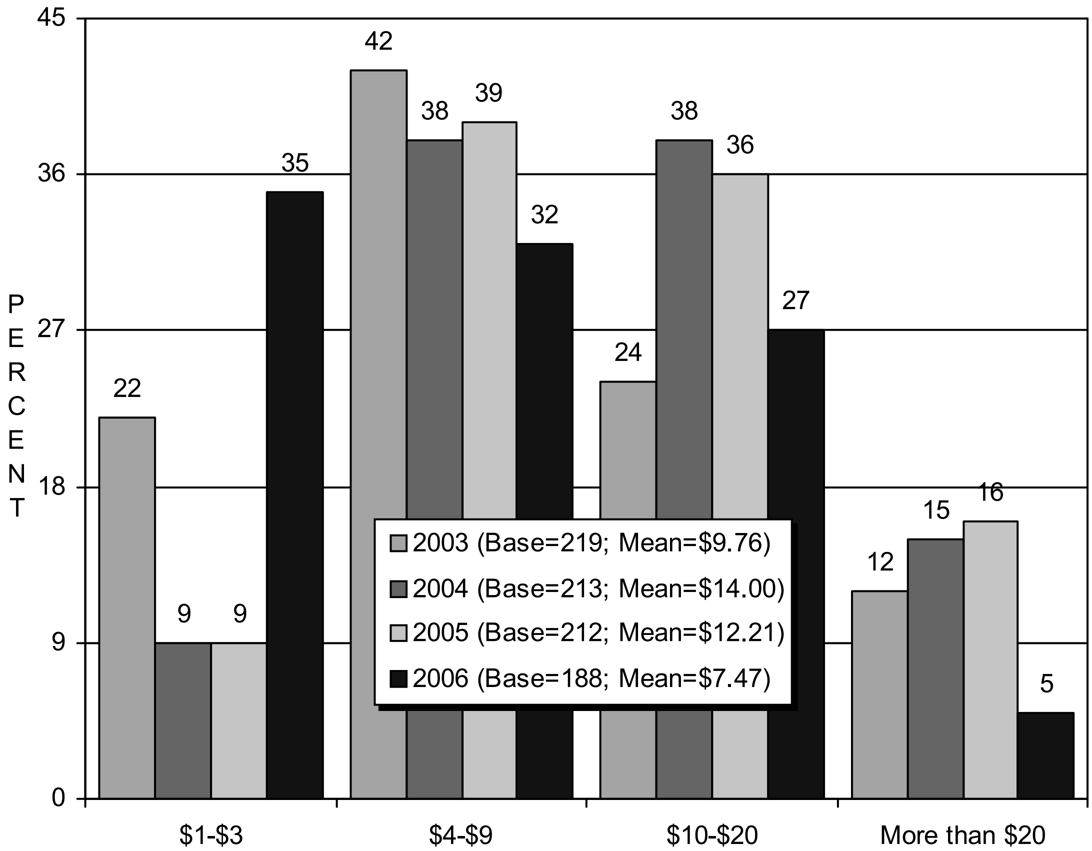
FIGURE 59
Table Minimum Played Most Often*
(Among Those Who Played Table Games)



As Figure 59 shows, those who played table games most often in 2006 were most likely to say they played games with a $5.00 minimum (55%). Twenty percent (20%) played games with a $10.00 or greater minimum (consistent with 2004, but a significant increase from 12% each in 2003 and 2005), while 5% played $1.00 minimum tables, a significant decrease from 11% in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

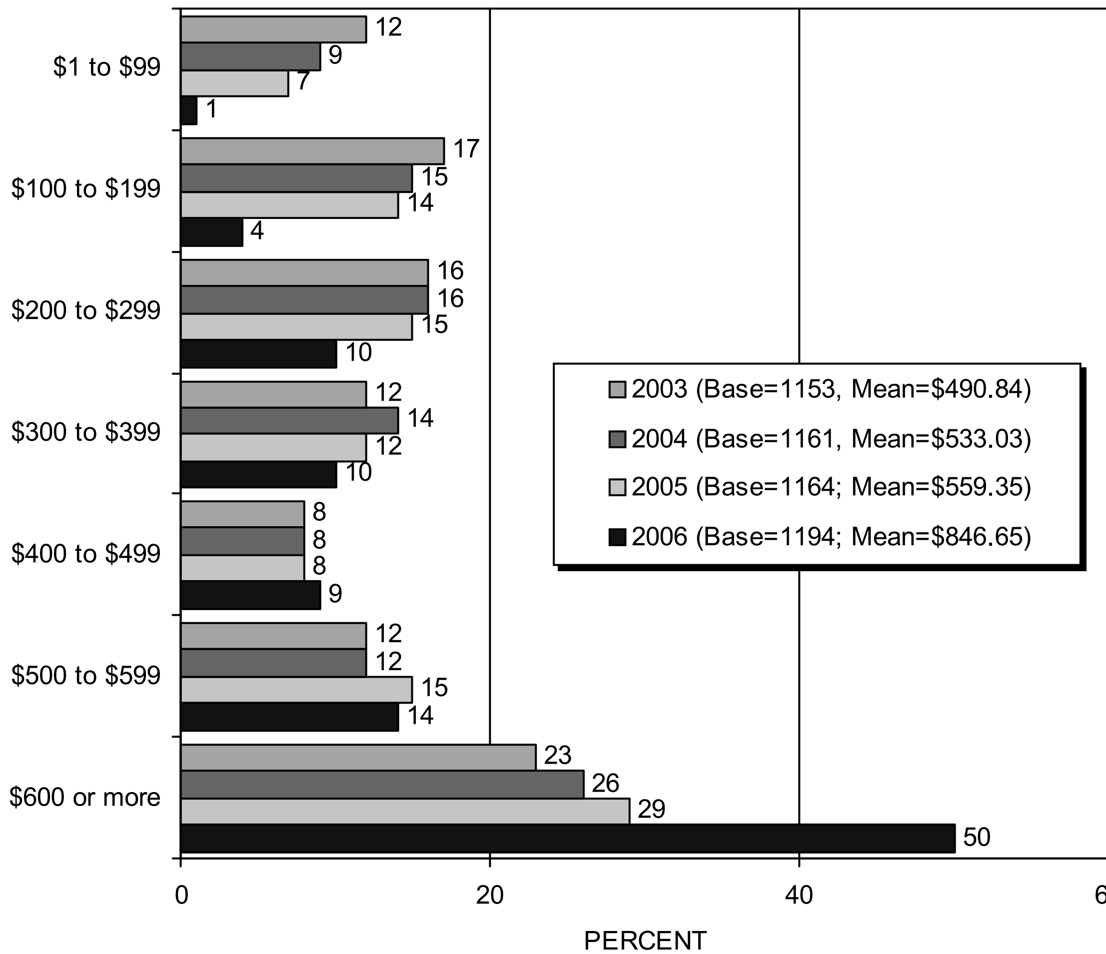
FIGURE 60
Average Bet — Table Games*
(Among Those Who Played Table Games)



We asked those who played table games about the size of their usual bet (Figure 60). The current average bet is $7.47, down significantly from $9.76 in 2003, $14.00 in 2004, and $12.21 last year. The proportion of respondents whose average bet was over $20 (5%) decreased significantly from 12% in 2003, 15% in 2004, and 16% in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 61
Trip Gambling Budget*
(Among Those Who Gambled)

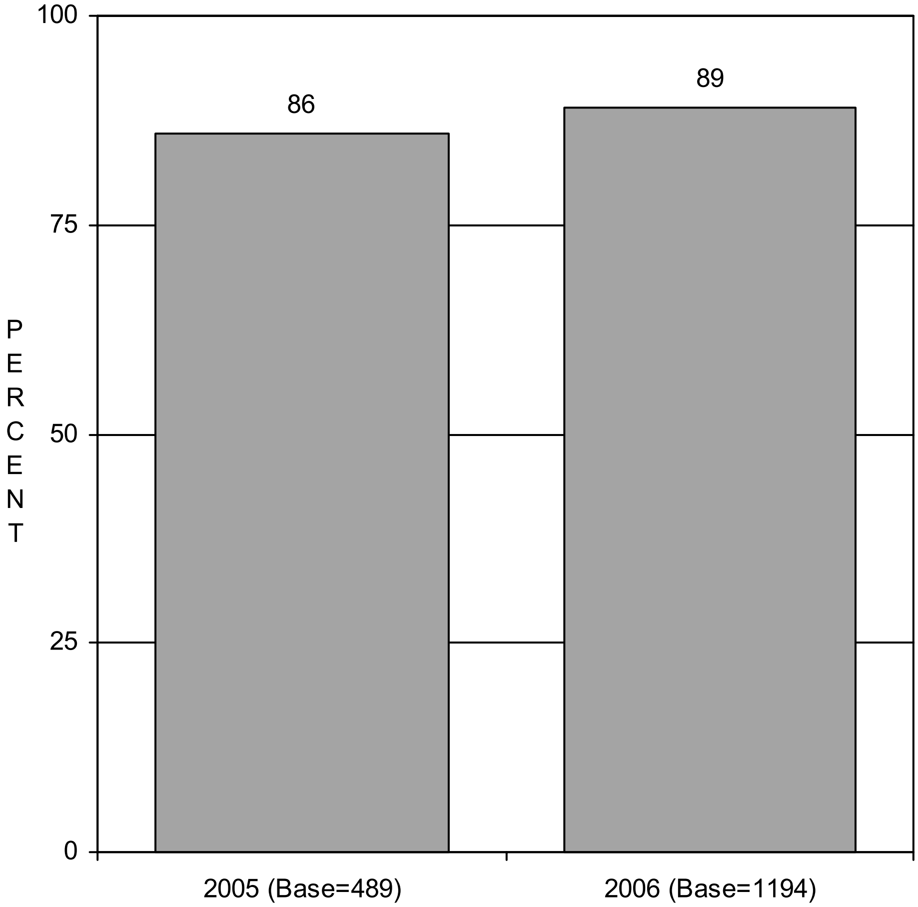


The average gambling budget reported by visitors to Laughlin was $846.65[†], up significantly from all prior readings (Figure 61).

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

† The estimated average gaming budget for 2006 has increased substantially from previous waves of this study. While it is possible that this result indicates a change in the customer mix for Laughlin, it is also possible that this result is simply a statistical anomaly. Future waves of this study will determine whether the former or latter explanation is supported.

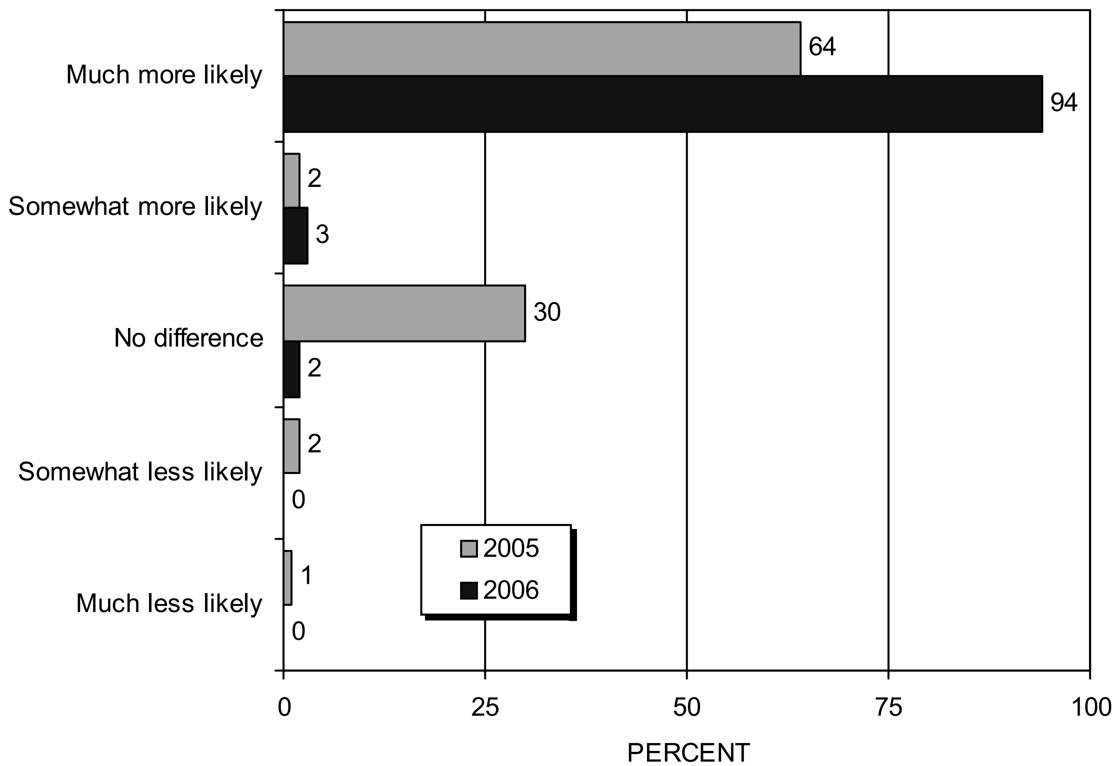
FIGURE 62
Whether Member of A Slot/Loyalty Club*



Beginning in August, 2005, respondents who gambled during their current trip to Laughlin were asked if they were a member of a slot or loyalty club at any of the Laughlin resorts. In 2006 Eighty-nine percent (89%) said that they were, an increase from 86% in 2005 (Figure 62).

* Only "yes" responses are presented in this chart.

FIGURE 63
Likelihood Of Visiting Laughlin With
More Places To Gamble Outside Laughlin

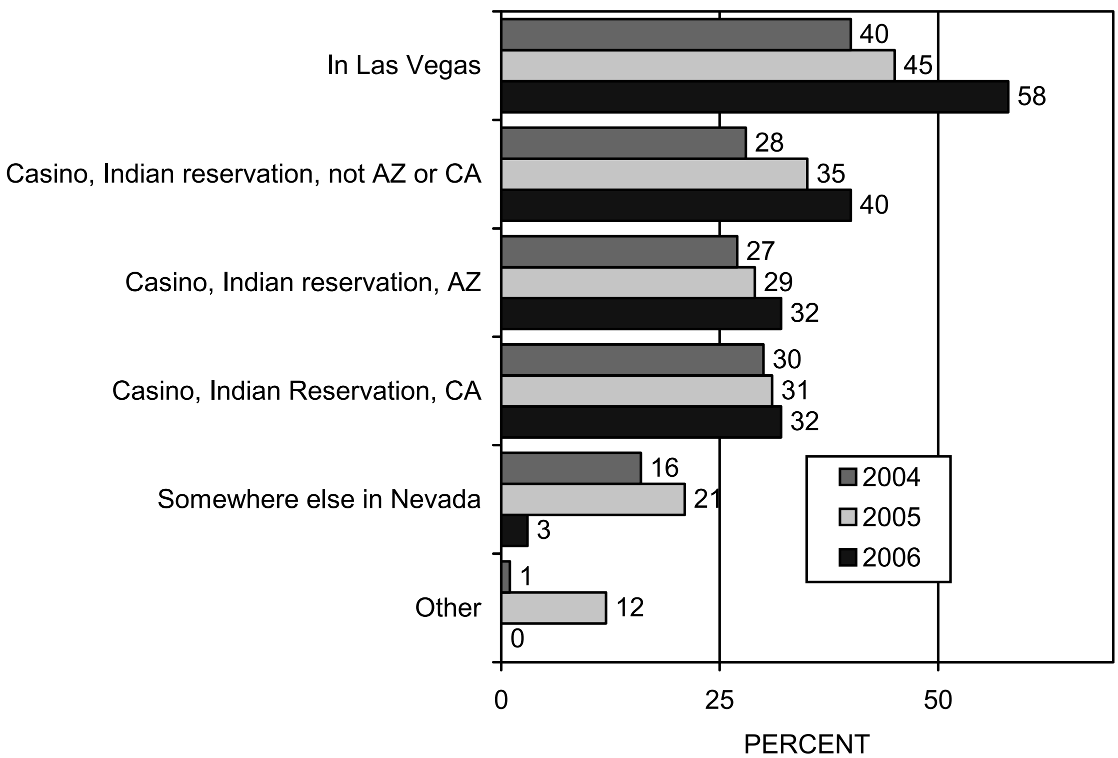


Beginning in 2005, all visitors to Laughlin were asked the following:

> "Now that there are more places to gamble outside of Laughlin, do you feel you are more likely or less likely to visit Laughlin, or does it not make a difference in your decision to visit Laughlin?"

Fully 94% of 2006 respondents said that having other places to gamble made them *much more* likely to visit Laughlin. Three percent (3%) said it made them somewhat more likely to visit Laughlin, while 2% said it made no difference in their decision to visit Laughlin. Less than 1% of respondents said that having other places to gamble made them *less* likely to visit Laughlin (Figure 63).

FIGURE 64
Where Respondents Gambled Outside Laughlin*
(Among All Visitors)



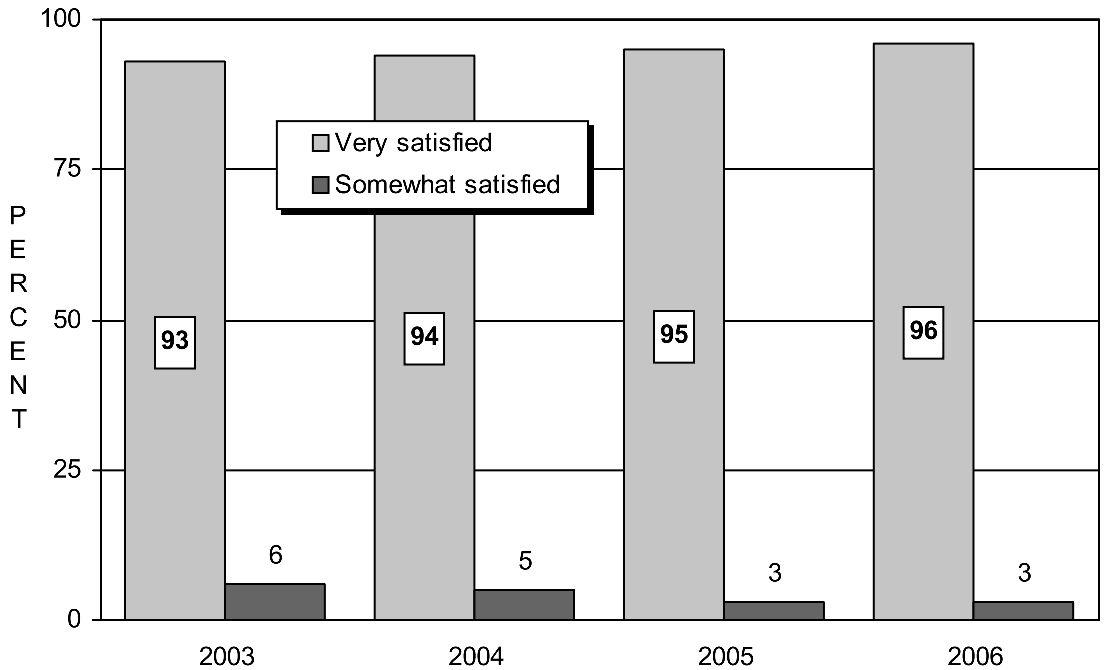
Starting in 2004, all respondents were asked about any gambling they had done at specific locations outside Laughlin within the past 12 months (Figure 64). Fifty-eight percent (58%) of Laughlin visitors in 2006 reported gambling recently in Las Vegas, an increase from 40% in 2004 and 45% in 2005. Four in ten (40%) gambled at an Indian reservation outside of Arizona or California, an increase from 28% in 2004 and 35% in 2005, and 32% gambled at an Indian reservation in California during the past year. Nearly one-third (32%) said they gambled at an Indian reservation in Arizona (up from 27% in 2004), and 3% also reported gambling at other locations in Nevada, a decrease from 16% in 2004 and 12% in 2005.

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

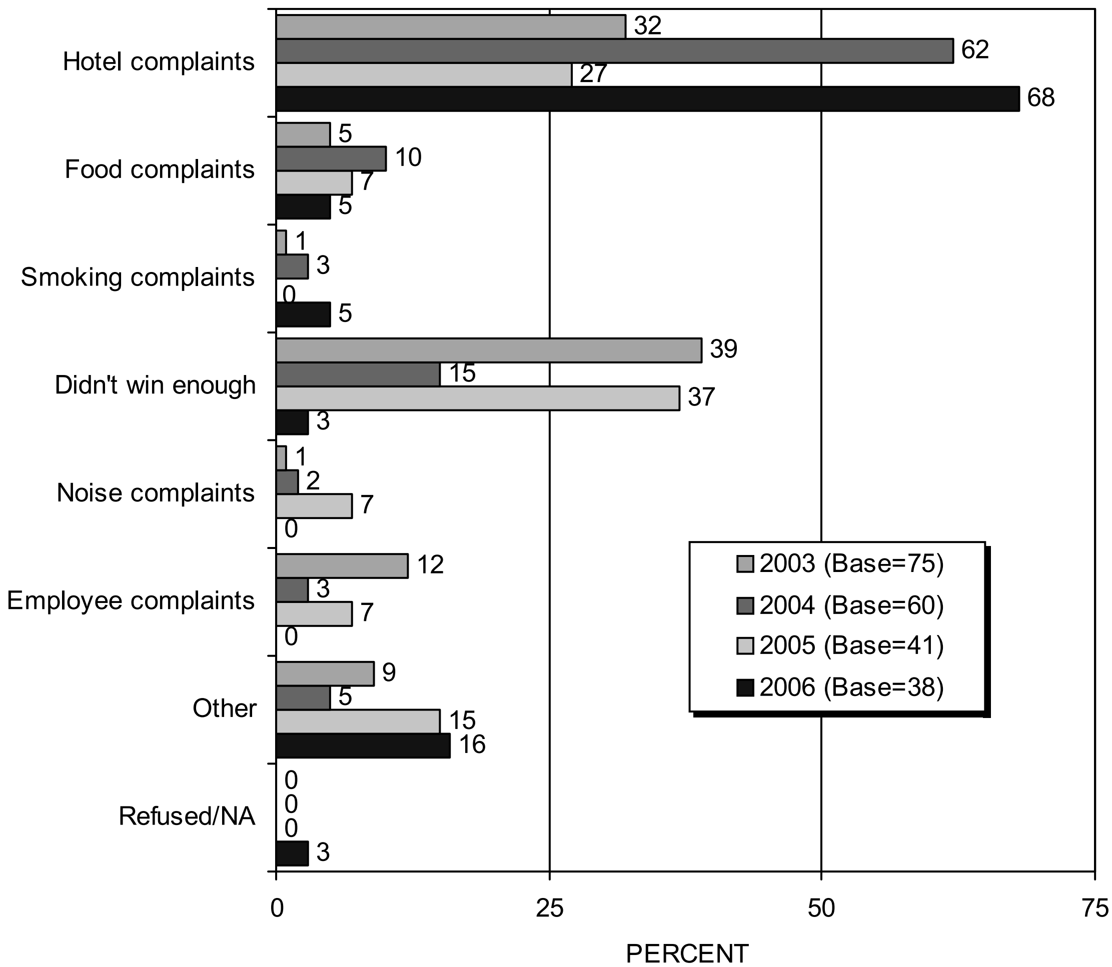
Ninety-six percent (96%) of visitors said they were “very satisfied” with their visit to Laughlin in the 2006 survey, up from 93% in 2003 and 94% in 2004. The proportion who said they were “somewhat satisfied” was 3%, down from 6% in 2003 and 5% in 2004. Only 10 visitors of the 1200 surveyed (1%) said they were at all dissatisfied with their visit to Laughlin.

FIGURE 65
Satisfaction With Visit*



* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 66
Why Not "Very" Satisfied With Visit*
(Among Those Who Were "Somewhat" Satisfied)



Those who were "somewhat" satisfied were asked why they were not "very" satisfied (Figure 66). Of the 38 respondents in this category, more than two in three (68%) expressed complaints with their hotels as the primary reason, a significant increase from 32% in 2003 and 27% in 2005. Eight percent (8%) had complaints about the entertainment they saw. Five percent (5%) each said they were not very satisfied due to food complaints or smoking complaints. Three percent (3%) said they were not very satisfied because they did not win enough money gambling, down from 39% in 2003, 15% in 2004, and 37% in 2005.

* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

VISITOR DEMOGRAPHICS

As Figures 67 and 68 show, respondents to the 2006 Laughlin Visitor Profile were most likely to be married (76%) and white (88%). While three in ten visitors are from Southern California (31%, down from 38% in 2003 and 39% in 2004), Laughlin had more foreign visitors in 2006 (7%) than previously (3% to 4%). Forty-four percent (44%) were 65 or older, comparable to 2004 and down slightly from 2005. Respondents were more likely to be retired (53%, down significantly from 59% each in 2004 and 2005) than employed (45%, up from 38% in 2004 and 35% in 2005). The largest proportion of respondents have a high school diploma or less (44%, up from 39% each in 2003 and 2005, and 40% in 2004). About one-half (49%) had a household income of less than $60,000, down from 54% in 2003, while 45% had incomes of $60,000 or more, up from 36% in 2003.

FIGURE 67
VISITOR DEMOGRAPHICS

	YEAR 2003	YEAR 2004	YEAR 2005	YEAR 2006
GENDER				
Male	50%	50%	50%	50%
Female	50	50	50	50
MARITAL STATUS				
Married	76	77	77	76
Single	7	8	9	8
Separated/divorced	10	7	6	6
Widowed	7	9	8	9
EMPLOYMENT				
Employed	43	38	35	45
Unemployed	1	1	1	0
Student	0	0	1	0
Retired	54	59	59	53
Homemaker	3	3	5	2
EDUCATION				
High school or less	39	40	39	44
Some college	32	33	32	30
College graduate	27	26	26	23
Trade/vocational school	2	2	4	3
AGE				
21 to 29	4	2	2	2
30 to 39	9	7	6	6
40 to 49	13	12	11	14
50 to 59	22	20	21	21
60 to 64	15	14	17	14
65 or older	38	45	44	44
MEAN	58.4	60.4	60.9	60.3
BASE	(1199)	(1200)	(1200)	(1200)

FIGURE 68
VISITOR DEMOGRAPHICS
(Continued/2)

	YEAR 2003	YEAR 2004	YEAR 2005	YEAR 2006
ETHNICITY				
White	85%	86%	89%	88%
African-American/Black	3	3	3	2
Asian/Asian American	1	1	1	1
Hispanic/Latino	9	9	6	8
Other	1	1	2	2
HOUSEHOLD INCOME				
Less than $20,000	6	5	5	2
$20,000 to $39,999	24	19	17	20
$40,000 to $59,999	24	25	20	27
$60,000 to $79,999	18	15	16	20
$80,000 or more	18	20	19	25
Not sure/no answer	9	17	23	7
VISITOR ORIGIN				
U.S.A.	97	96	96	94
Eastern states*	2	2	3	2
Southern states†	7	6	7	8
Midwestern states‡	11	11	12	14
Western states§	76	77	75	69
California	40	41	36	33
Southern California	38	39	34	31
Northern California	2	2	2	2
Arizona	21	22	24	21
Other West	15	14	15	14
No ZIP code given	0	0	0	0
Foreign	3	4	4	7
BASE	(1199)	(1200)	(1200)	(1200)

* Eastern states: Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

† Southern states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

‡ Midwestern states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

§ Western states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming.

APPENDIX:

QUESTIONNAIRE WITH AGGREGATE RESULTS

RESPONDENT ID# ____ ____ ____ ____

INTERVIEW DATE: ___ ___/___ ___/___ ___

INTERVIEW LOCATION CODE ____ ____ ____ ____

TIME STARTED (USE 24-HOUR CLOCK)

____ ____:____ ____

TIME ENDED (USE 24-HOUR CLOCK)

____ ____:____ ____

INTERVIEW LENGTH ____ ____ MIN.

INTERVIEWER ID # ___ ___

RESPONDENT GENDER (BY OBSERVATION)

MALE............................50%

FEMALE.......................50

Hello. I'm ________________ from GLS Research, a national marketing research firm. We are conducting a survey of visitors for the Laughlin Visitors Bureau. All answers are kept strictly confidential.

1. Are you a visitor to the Laughlin/Bullhead City area, or are you a resident of the Laughlin/Bullhead City area?

VISITOR..................	**ASK Q2**
RESIDENT	**TERMINATE**
NOT SURE/DK.........	
REFUSED/NA	

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

YES	**ASK Q3**
NO	**TERMINATE**
NOT SURE/DK.........	
REFUSED/NA	

3. Will you be leaving Laughlin within the next 24 hours?

YES..........................	**ASK A1**
NO	**TERMINATE**
NOT SURE/DK	
REFUSED/NA..........	

A1. Is this your first visit to Laughlin, or have you visited before?

FIRST VISIT 15%	**SKIP TO A6 ON PAGE 3**
VISITED BEFORE .85	**ASK A2**
NOT SURE/DK 0	
REFUSED/NA..........0	

A2. Including this trip, how many times have you visited Laughlin in the *past 5 years*? **(RECORD NUMBER BELOW AS 2 DIGITS. IF RESPONDENT SAYS "1," CONFIRM THAT THIS IS NOT THE RESPONDENT'S FIRST VISIT.)**

10.48 MEAN (ALL VISITORS)
12.13 MEAN (REPEAT VISITORS) (N=1022)

A3. Including this trip, how many times have you visited Laughlin in the *past 12 months*? **(RECORD NUMBER BELOW AS 2 DIGITS.)**

2.50 MEAN (ALL VISITORS)
2.76 MEAN (REPEAT VISITORS) (N=1022)

A4. Have you visited Laughlin in the past to attend a special event such as River Days, a rodeo, a car or motorcycle rally, or an outdoor concert?

(N=1022)

YES	11%
NO	89
NOT SURE/DK	0
REFUSED/NA	0

A5. Thinking back to your *FIRST trip to Laughlin*, what was your primary reason for visiting? **(ASK AS OPEN END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**

(N=1022)

VACATION/PLEASURE	43%
TO GAMBLE	34
VISIT FRIENDS/RELATIVES	13
TO ATTEND A SPECIAL EVENT (E.G., DESERT CHALLENGE, A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)	2
CONVENTION/OTHER BUSINESS PURPOSES	2
WATER-BASED RECREATION	2
JUST PASSING THROUGH	5
SOME OTHER REASON	0
NOT SURE/DK	0
REFUSED/NA	0

A6. **(ASK OF ALL RESPONDENTS.)** What was the *primary purpose* of *THIS* trip to Laughlin? **(ASK AS OPEN END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)**

VACATION/PLEASURE....................48%

TO GAMBLE 33

VISIT FRIENDS/RELATIVES............11

TO ATTEND A SPECIAL EVENT (E.G., RIVER DAYS, A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT) 2

CONVENTION/OTHER BUSINESS PURPOSE 1

TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 1

WATER-BASED RECREATION 1

JUST PASSING THROUGH 3

SOME OTHER REASON....................0

NOT SURE/DK...................................0

REFUSED/NA 0

<u>INTERVIEWER</u>:
CONTINUE WITH A8.

A8. Did you (or will you) participate in a gaming tournament (for example a video poker, slot machine, blackjack, or poker tournament)?

YES 6%

NO 94

NOT SURE/DK.............0

REFUSED/NA 0

B1. Did you travel to Laughlin by... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Air....................................12%

Bus
(IF “YES” ASK, “Do you mean...”:)
Regularly scheduled bus service like Greyhound 2

Or a chartered or escorted bus service or bus tour......................4

Automobile.......................80

Motorcycle 0

Recreational Vehicle (RV).......................3

REFUSED/NA....................0

B2. How far in advance did you plan this trip to Laughlin? **(ASK AS OPEN END.)**

SAME DAY 3%

1-3 DAYS BEFORE.......................... 10

4-6 DAYS BEFORE 7

7-14 DAYS BEFORE 24

15-30 DAYS BEFORE...................... 27

31-60 DAYS BEFORE...................... 14

61-90 DAYS BEFORE........................ 7

MORE THAN 90 DAYS BEFORE 8

NOT SURE/DK 0

REFUSED/NA.................................... 0

B3. Did a travel agency assist you in planning your trip?

YES 8%	**SKIP TO B4**
NO 92	**ASK B3a**
NOT SURE/DK.....0 REFUSED/NA 0	**SKIP TO B4a**

B3a. What is the MAIN reason you did not use a travel agent to help you plan your trip? **(ACCEPT ONLY ONE RESPONSE.)** (N=1105)

CALLED 800# 76%
USED THE INTERNET 14
PREFER TO MAKE MY OWN PLANS 5
LAST MINUTE DECISION/NO TIME 4
MY BUSINESS/COMPANY MADE PLANS 1
SOMEONE ELSE MADE PLANS 1
DAYTRIP/STAYING WITH FRIENDS/ RELATIVES...0
ALL OTHER MENTIONS 0

AFTER ASKING B3a, SKIP TO B4a

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

(ASK ONLY OF THOSE WHO SAID "YES" IN B3.)

B4. Did the travel agent... **(READ LIST)**
(N=93)

	YES	NO	DON'T KNOW	RE-FUSED
Influence your decision to visit Laughlin?	34%	63%	2%	0%
Influence your choice of accommodations?	80	18	2	0
"Book" your accommodations?	87	13	0	0
"Book" your transportation?	84	14	2	0

B4a. Did you use the Internet in planning your trip?

YES 13%	**ASK B4b**
NO .... 87 NOT SURE/DK.......0 REFUSED/NA 0	**SKIP TO B5**

INTERVIEWER PLEASE NOTE: A RESPONDENT *MAY* BOOK ACCOMMODATIONS OR TRANSPORTATION THROUGH A TRAVEL AGENT *OR* THROUGH THE INTERNET — BUT NOT BOTH. HOWEVER, THEY CAN BE INFLUENCED BY BOTH A TRAVEL AGENT AND THE INTERNET.

B4b. **(ASK OF RESPONDENTS WHO SAID "YES" IN B4a.)**
Did you use the Internet to... **(READ LIST)**
(N=161)

	YES	NO	DON'T KNOW	RE-FUSED
"Book" your accommodations?	96%	4%	0%	0%
"Book" your transportation?	24	74	2	0

B4c. Did you find information on the Internet that... **(READ LIST)**
(N=161)

	YES	NO	DON'T KNOW	RE-FUSED
Influenced your decision to visit Laughlin?	8%	90%	2%	0%
Influenced your choice of accommodations?	68	30	2	0

B5. At what point in your planning did you decide... **(READ LIST *AND FIRST 3 RESPONSE CODES*)**

AMONG ALL RESPONDENTS:	Before Leaving Home	While En Route To Laughlin	After Arrival	DOES NOT APPLY	DON'T KNOW	RE-FUSED
				DO *NOT* READ THESE RESPONSE CODES		
a. Where you would stay?	92%	1%	7%	1%	0%	0%
b. Where you would gamble?	85	1	13	1	0	0
c. Which shows you would see?	3	0	18	78	2	0

AMONG THOSE TO WHOM THE QUESTION APPLIES:	Before Leaving Home	While En Route To Laughlin	After Arrival	DK/NA	
a. Where you would stay?	93%	1%	7%	0%	(N=1194)
b. Where you would gamble?	85	1	13	0	(N=1194)
c. Which shows you would see?	13	0	80	7	(N=265)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

B6. Did you travel to Laughlin directly from your permanent (primary) residence or from another location?

FROM PERMANENT RESIDENCE 89%	**SKIP TO C1**
FROM ANOTHER LOCATION 11	**ASK B7**
NOT SURE/DK .... 0 REFUSED/NA 0	**SKIP TO C1**

B7. Where are you traveling from? **(PROBE FOR LOCATION IMMEDIATELY PRIOR TO LAUGHLIN VISIT.)** (N=127)

LAS VEGAS 58%	**ASK B7a**
ARIZONA .... 17 CALIFORNIA .... 10 OTHER .... 16 NOT SURE/DK .... 0 REFUSED/NA 0	**SKIP TO C1**

B7a. Did you travel to Las Vegas by... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Air .... 89% (N=73)

Automobile, truck, RV, bus 11

C1. On this trip to Laughlin, where did you lodge? **(ASK AS OPEN END. ACCEPT ONLY *ONE* RESPONSE. CIRCLE CODE NUMBER. INTERVIEWER: A "LODGING" IS ANY PLACE THE RESPONDENT *SLEPT* OVERNIGHT. SOME PEOPLE COME TO LAUGHLIN AT NIGHT JUST TO GAMBLE THROUGH THE NIGHT AND LEAVE THE NEXT DAY. THESE PEOPLE DID NOT "LODGE" ANYWHERE (CODE #5000).)**

TYPE OF LODGING

HOTEL	97%
MOTEL	1
RV PARK	1
FRIENDS/RELATIVES	1
DAYTRIP/OTHER	1

LOCATION OF LODGING

LAUGHLIN	97%
BULLHEAD CITY	1
LOCATION COULD NOT BE DETERMINED	3

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=1194)

HOTEL	97%
MOTEL	1
RV PARK	1
FRIENDS/RELATIVES	1
OTHER	0

IF RESPONSE TO C1 IS A HOTEL OR MOTEL (CODES 1000-2999), ASK C1a THROUGH C8a.

IF RESPONSE TO C1 IS AN RV PARK (CODES 3000-3999), ASK C1a & C2, <u>THEN SKIP TO C9 ON PAGE 9</u>.

IF RESPONSE TO C1 IS CODE #4000 <u>OR HIGHER</u>, SKIP TO C9 ON PAGE 9.

C1a. Which of the following **[SHOW CARD]** best describes how you, or someone in your party, booked your accommodations in Laughlin? **(ACCEPT ONLY ONE RESPONSE.)** (N=1184)

a. Booked by phone, calling the hotel, motel, or RV park directly.. 66%
b. Booked through a travel agent (either in person or by phone)........7
c. Booked by phone but not by calling the hotel directly and not through a travel agent....................5
d. Booked at a website on the Internet....................................... 13
e. Booked in person at the hotel, motel, or RV park...........................7
f. The trip was a gift, prize, or incentive, so the accommodations were booked for you 0
g. Not sure because someone else in your party booked the hotel and you don't know how they did it.......2

OTHER (SPECIFY:) (VOLUNTEERED)..........................0
REFUSED/NA (VOLUNTEERED).......0

C1b. **(IF RESPONSE "d" IN C1b IS CHOSEN, ASK:)** Which Web site did you use to book your accommodations? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).** (N=155)

AOL (AMERICA ONLINE)....0%
EXPEDIA.COM 3
HOTWIRE.COM...................1
ORBITZ................................1
PRICELINE.COM.................3
TRAVEL.COM......................0
TRAVELOCITY 1
YAHOO 1
HOTEL WEB SITE (ANY).................................84
OTHER.................................7
NOT SURE/DK.....................0
REFUSED/NA 0

C2. How far in advance did you make your reservations for your (hotel room/motel room/RV park space) for this trip to Laughlin? **(ASK AS OPEN END.)** (N=1184)

SAME DAY 7%
1-3 DAYS BEFORE............9
4-6 DAYS BEFORE............7
7-14 DAYS BEFORE........24
15-30 DAYS BEFORE......27
31-60 DAYS BEFORE......13
61-90 DAYS BEFORE........7
MORE THAN 90 DAYS BEFORE.............................6
NOT SURE/DK 0
REFUSED/NA.....................0

PEOPLE STAYING IN AN RV PARK (CODE 3000-3999 IN C1) SHOULD SKIP TO C9 ON PAGE 8 *AFTER BEING ASKED C2.*

C3. Including yourself, how many people stayed in your room? (N=1169)

ONE 12%
TWO 81
THREE.................................5
FOUR OR MORE 3
REFUSED/NA.......................0
1.99 MEAN

INTERVIEWER:
QUESTION C4 DOES NOT APPEAR IN THIS VERSION OF THE QUESTIONNAIRE.

C5. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=1169)

HOTEL/AIRLINE PACKAGE DEAL............9% HOTEL/AMENITIES PACKAGE DEAL............2 TOUR/ TRAVEL GROUP 1	**ASK C6**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE ....36 REGULAR FULL-PRICE ROOM RATE....14	**SKIP TO C8**
CASINO COMPLIMENTARY 38	**SKIP TO C9**
ANOTHER RATE ....0 NOT SURE/DK...............0 REFUSED/NA 0	**SKIP TO C8**

C6. What was the total *PER PERSON* cost of your package? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

$0 - $49 ....2% (N=137)
$50 - $99 23
$100 - $149 13
$150 OR MORE 52
NOT SURE/REFUSED .11
<u>$223.80</u> MEAN
<u>$199.00</u> MEDIAN

C6a. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=137)

OUTDOOR BILLBOARD 0%
BROCHURE 2
E-MAIL OFFER.................................. 2
INTERNET AD (POP-UP OR BANNER AD) 8
OFFER RECEIVED IN THE MAIL.... 30
NEWSPAPER.................................... 4
RADIO 2
RESERVATION AGENT/ CALL CENTER 1
TELEVISION...................................... 0
TRAVEL AGENT 41
ANY WEB SITE 1
WORD-OF-MOUTH.......................... 10
OTHER 0
NOT SURE/DK 0
REFUSED/NA................................... 0

SKIP TO C9

C8. **(ASK ONLY OF NON-PACKAGE VISITORS)** By the time you leave Laughlin, how much will you have spent, *on average per night*, on your hotel or motel room? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

$0 - $24.............................. 18% (N=593)
$25 - $49............................ 60
$50 OR MORE.................. 22
NOT SURE/NO ANSWER... 0
<u>$40.89</u> MEAN
<u>$37.00</u> MEDIAN

C8a. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=593)

OUTDOOR BILLBOARD..................1%
BROCHURE.....................................5
E-MAIL OFFER 1
INTERNET AD (POP-UP OR BANNER AD)...........................11
OFFER RECEIVED IN THE MAIL ..45
NEWSPAPER 2
RADIO 1
RESERVATION AGENT/ CALL CENTER................................20
TRAVEL AGENT 2
ANY WEB SITE................................4
WORD-OF-MOUTH 9
OTHER 0
NOT SURE/DK..................................0
REFUSED/NA 0

C9. **(ASK OF ALL RESPONDENTS.)** Including yourself, how many *adults* 21 years old or older are in your *IMMEDIATE* party (such as a spouse or friends who are traveling with you)? **(IF RESPONDENT SAYS MORE THAN 8, EXPLAIN:** "If you are part of a tour group, do *not* include all members of your tour group -- only those adult friends and relatives who are traveling with you.")

(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)

1.................................. 11%
2.................................. 81
3.................................... 5
4.................................... 2
5 OR MORE 1
2.03 MEAN
2.00 MEDIAN

C10. Are there any people under *the age of 21* in your *IMMEDIATE* party?

YES 3%	**ASK C11**
NO .... 97 NOT SURE/DK................ 0 REFUSED/NA 0	**SKIP TO C12**

C12. By the time you leave, how many *nights* will you have stayed in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)**

DAYTRIP 1%
1 8
2 33
3 31
4 15
5 OR MORE........................... 12
3.10 MEAN
3.00 MEDIAN

C13. By the time you leave, how many *days* will you have been in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. MUST BE AT LEAST "01.")**

1 .... 1%
2 8
3 33
4 31
5 15
6 OR MORE........................... 12
4.10 MEAN
4.00 MEDIAN

C14. On what day of the week did you arrive in Laughlin?

SUNDAY......................... 17%
MONDAY 16
TUESDAY....................... 16
WEDNESDAY................. 12
THURSDAY 13
FRIDAY........................... 14
SATURDAY 12
REFUSED/NA................... 0

D1. Have you gambled during this visit to Laughlin?

YES 99%	**ASK D2**
NO .... 1 NOT SURE/DK........ 0 REFUSED/NA 0	**SKIP TO D12 ON PAGE 10**

D2. On average, how many hours *PER DAY* did you spend gambling? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?") (N=1194)

1 TO 2 HOURS 8%
3 TO 4 HOURS 26
5 TO 6 HOURS 28
7 TO 8 HOURS 21
9 TO 10 HOURS 10
MORE THAN 10 HOURS........... 6
6.15 MEAN
5.00 MEDIAN

D3. How many different casinos have you gambled at during your stay in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)** (N=1194)

1.. 75%
2.. 16
3... 5
4... 3
5 TO 6.. 1
MORE THAN 6........................... 1
1.44 MEAN
1.00 MEDIAN

D4. Which type of casino game do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=1194)

SLOT MACHINES ..... 54% VIDEO POKER.......... 25 OTHER VIDEO MACHINES (21, KENO, ETC.) 2	**ASK D5**
BACCARAT .... 0 BIG 6........................... 0	**SKIP TO D7**
BINGO 1	**SKIP TO D10**
BLACKJACK................ 8 CARIBBEAN STUD POKER .... 0 CRAPS 3	**SKIP TO D7**
KENO.......................... 1	**SKIP TO D10**
POKER 3	**SKIP TO D7**
RACE/SPORTS-BOOK 2	**SKIP TO D10**
ROULETTE.................. 1	**SKIP TO D7**
OTHER .... 0 NOT SURE/DK .... 0 REFUSED/NA.............. 0	**SKIP TO D10**

★ ★ ★ ★ ★ ★ ★ ★ ★

D5. Which denomination machine do you play *MOST OFTEN*. **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=960)

PENNY 17%
NICKEL...............................19
DIME 0
QUARTER 51
HALF DOLLAR 1
DOLLAR 11
FIVE DOLLARS....................0
25 DOLLARS........................0
OTHER 0
NOT SURE/DK 0
REFUSED/NA.......................0

CONTINUE WITH D6

D6. On the average, how many coins/tokens do you usually insert before each play on a machine? **(INTERVIEWER: IF RESPONDENT SAYS "MAXIMUM," ASK:** "How many would that be on the average?") (N=960)

1-2 .... 7%
3....................................... 18
4-5 47
6 OR MORE 27
REFUSED/NO ANSWER... 1
10.35 MEAN
5.00 MEDIAN

SKIP TO D10

★ ★ ★ ★ ★ ★ ★ ★ ★

D7. What table minimum do you play *MOST OFTEN*. **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=188)

LESS THAN $1.00 .... 1%
$1.00..................................... 5
$2.00..................................... 9
$3.00..................................... 9
$5.00..................................... 55
$10.00 18
$25.00 2
$50.00 0
OVER $50.00 0
OTHER................................. 0
NOT SURE/DK..................... 0
REFUSED/NA 0

CONTINUE WITH D8

D8. What is your average bet? **(WRITE AMOUNT IN BLANKS BELOW.)** (N=188)

$1 - $3 .... 35%
$4 - $9 32
$10 - $20 27
OVER $20 5
DON'T KNOW/NO ANSWER.. 1
$7.47 MEAN
$5.00 MEDIAN

INTERVIEWER:
THERE IS NO QUESTION D9

D10. **(ASK OF ALL GAMBLERS.)**
Not including travel, food, or lodging, how much money did you budget for gambling on this trip? Include only your own, personal, gambling budget and not the gambling budgets of others who may have been with you. **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)** (N=1194)

$1 - $99................................... 1%
$100 - $199............................. 4
$200 - $299............................ 10
$300 - $399............................ 10
$400 - $499.............................. 9
$500 - $599............................ 14
$600 OR MORE..................... 50
NOT SURE/NO ANSWER....... 2
$846.65* MEAN
$600.00 MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=1194)

YES...................... 89%
NO 11
NOT SURE/DK 0
REFUSED/NA........ 0

* The estimated average gaming budget for 2006 has increased substantially from previous waves of this study. While it is possible that this result indicates a change in the customer mix for Laughlin, it is also possible that this result is simply a statistical anomaly. Future waves of this study will determine whether the former or latter explanation is supported.

D12. **(ASK OF ALL RESPONDENTS.)** In which of the following locations have you gambled at a _casino facility_ during the _past 12 months_? Please do not include "card rooms," even though they are similar to casinos. Have you gambled... **(READ LIST)**

A.	At a casino on an Indian reservation in California	32%
B.	At a casino on an Indian reservation in Arizona	32
C.	At a casino on an Indian reservation outside Arizona or California	40
I.	In Las Vegas, Nevada	58
J.	Somewhere else in Nevada (outside the Laughlin area)	3
X.	OTHER	0

D15. Now that there are more places to gamble outside of Laughlin, do you feel you are MORE LIKELY or LESS LIKELY to visit Laughlin, or does it make NO DIFFERENCE in your decision to visit Laughlin? (IF MORE OR LESS LIKELY, ASK:) Is that MUCH (more/less likely) or SOMEWHAT (more/less likely)?

MUCH MORE LIKELY................. 94%
SOMEWHAT MORE LIKELY 3
NO DIFFERENCE..........................2
SOMEWHAT LESS LIKELY...........0
MUCH LESS LIKELY 0
NOT SURE/DK..............................0
REFUSED/NA 0
4.92 MEAN

B8. Have you visited Las Vegas, Nevada, in the past 5 years?

YES 74%
NO 26
NOT SURE/DK..................0
REFUSED/NA 0

B9, B10, & B11 DO NOT APPEAR IN THIS VERSION OF THE QUESTIONNAIRE

B12. Will you (or did you) visit Las Vegas either before or after this visit to Laughlin?

YES...................... 20%	**ASK B13**
NO .... 80 NOT SURE/DK ...... 0 REFUSED/NA........ 0	**SKIP TO B14**

B13. On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)**

(N=241)

A.	Downtown Las Vegas (that is, the area on or near Fremont Street)?	26%
B.	The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?	69

B14. Will you (or did you) visit other areas of Nevada or the surrounding area (for example, the Grand Canyon and Death Valley), either before or after this visit to Laughlin?

YES.........................7%	**ASK B15**
NO .... 93 NOT SURE/DK ...... 0 REFUSED/NA........ 0	**SKIP TO C15**

B15. On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)**

(N=81)

A.	**[DO NOT ASK]**	
B.	Hoover Dam?	21%
C.	Lake Mead?	9
D.	Lake Havasu/ Colorado River?	36
E.	Lake Mojave/ Davis Dam?	11
F.	Grand Canyon?	17
G.	Bryce Canyon?	1
H.	Zion National Park?	3
I.	Oatman, Arizona?	44
X.	Other?	11

C15. By the time you leave Laughlin, how much will you have spent *ON AVERAGE PER DAY* for...

a. Food and drink. Please include only your own, personal expenses and not those of your entire party. **(AVERAGE TRIP EXPENDITURES PER DAY.)**

$208.22 MEAN (INCLUDING $0)
$209.27 MEAN (EXCLUDING $0)

b. Local transportation (for example, car rental, taxi, limo, gas). Please include all your daily transportation expenses. **(AVERAGE TRIP EXPENDITURES PER DAY.)**

$3.78 MEAN (INCLUDING $0)
$100.84 MEAN (EXCLUDING $0)

C16. By the time you leave Laughlin, how much will you have spent on each of the following items *IN TOTAL FOR YOUR ENTIRE TRIP*? Please include only your own, personal expenses and not those of your entire party. **(READ EACH ITEM. ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

A. Shopping (gifts, clothing, personal items)	$45.24	MEAN (INCLUDING $0)
	$111.94	MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)	$2.78	MEAN (INCLUDING $0)
	$43.27	MEAN (EXCLUDING $0)
C. Sightseeing	$0.97	MEAN (INCLUDING $0)
	$55.43	MEAN (EXCLUDING $0)
D. Other	$0.51	MEAN (INCLUDING $0)
	$67.44	MEAN (EXCLUDING $0)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Just a few more questions on your impressions of Laughlin in general...

F1. Overall, how satisfied were you with your visit to Laughlin? Were you... **(READ LIST.)**

Very satisfied.................... 96%	**SKIP TO G1 ON PAGE 13**
Somewhat satisfied 3	**ASK F2**
Somewhat dissatisfied .... 1 Very dissatisfied 0	**SKIP TO F3**
<u>DO NOT READ</u> NOT SURE/DK................... 0 REFUSED/NA 0	**SKIP TO G1 ON PAGE 13**

F2. You just said you were *somewhat* satisfied with your overall experience in Laughlin. What is the *MAIN* reason that keeps you from saying you were *very* satisfied? **(ACCEPT ONLY ONE RESPONSE.)**

	(N=38)
HOTEL COMPLAINTS	68%
SMOKING COMPLAINTS	5
FOOD/FOOD SERVICE COMPLAINTS	5
DIDN'T WIN ENOUGH MONEY	3
OTHER	16
REFUSED/NO ANSWER	3

F3. You just said you were *dissatisfied* with your overall experience in Laughlin. What is the *MAIN* reason that you were *dissatisfied*? **(ACCEPT ONLY ONE RESPONSE.)**

(N=10)

HOTEL COMPLAINTS....................... 100%

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Now I'd like to ask you a few final questions for statistical purposes.

G1. Are you currently... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Employed 45%	**ASK G2**
Unemployed ....0 Student ....0 Retired.............................53 Homemaker.......................2	**SKIP TO G3**
DO NOT READ REFUSED/NA 0	**SKIP TO G3**

G2. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS NOT AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=536)

SALES/CLERICAL WORKERS .. 30%
SERVICE WORKERS................. 22
MANAGERS/OFFICIALS/
PROPRIETORS 18
PROFESSIONAL/TECHNICAL... 18
CRAFT WORKERS/FOREMEN.... 9
OTHER.. 3

G3. What was the last grade or year of school that you completed? **(DO NOT READ LIST.)**

GRADE SCHOOL OR
SOME HIGH SCHOOL 3%
HIGH SCHOOL DIPLOMA
(FINISHED GRADE 12) 41
SOME COLLEGE (INCLUDES
JUNIOR/COMMUNITY COLLEGE —
NO BACHELOR'S DEGREE).......30
GRADUATED COLLEGE.............18
GRADUATE SCHOOL
(MASTER'S OR PH.D.)..................5
TECHNICAL, VOCATIONAL,
OR TRADE SCHOOL 3
REFUSED/NA 0

G4. What is your current marital status? Are you... **(READ LIST)**

Married.......................................76%
Single..8
Separated or divorced 6
Widowed.......................................9
REFUSED/NA...............................0

G5. What country do you live in?

USA 94%	**ASK G6**
FOREIGN 6	**SKIP TO G7**
REFUSED/NA...................0	**SKIP TO G7**

G6. What is your ZIP code? **(REGION DERIVED FROM ZIP CODES)**

EAST	2%
SOUTH	8
MIDWEST	14
WEST	69
CALIFORNIA	33
ARIZONA	21
OTHER WEST	14
FOREIGN VISITORS	7
NO ZIP CODE GIVEN	0

G7. **(ETHNICITY BY OBSERVATION. IF UNSURE, ASK:)** 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, Asian, Hispanic or Latino -- or of some other ethnic or racial background?)

WHITE	88%
BLACK OR AFRICAN AMERICAN	2
ASIAN OR ASIAN AMERICAN	1
HISPANIC/LATINO	8
NATIVE AMERICAN	1
MIXED RACE	0
OTHER	0
NOT SURE/DON'T KNOW	0
REFUSED/NO ANSWER	0

G8. What is your age, please? **(RECORD IT EXACTLY *AND CIRCLE APPROPRIATE CATEGORY BELOW*.)**

60.26 MEAN
62.00 MEDIAN

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

21 to 29	2%
30 to 39	6
40 to 49	14
50 to 59	21
60 to 64	14
65 and older	44
REFUSED/NA	0

G9. Please tell me which one of these categories includes your total household income before taxes last year. **(SHOW INCOME CARD.)** Include your own income and that of any member of your household who is living with you.

A. Less than $20,000	2%
B. $20,000 to $29,999	8
C. $30,000 to $39,999	12
D. $40,000 to $49,999	14
E. $50,000 to $59,999	13
F. $60,000 to $69,999	11
G. $70,000 to $79,999	9
H. $80,000 to $89,999	6
I. $90,000 to $99,999	4
J. $100,000 to $149,999	10
K. $150,000 or more	5
NOT SURE/DK	0
REFUSED/NA	7

RESPONDENT SHOW CARDS

HOW ACCOMMODATIONS WERE BOOKED

a. **PHONED DIRECTLY**
Booked by phone, calling the hotel, motel, or RV park directly

b. **TRAVEL AGENT**
Booked through a travel agent (either in person or by phone)

c. **PHONED, BUT NOT DIRECTLY, NOT THROUGH AGENT**
Booked by phone but not by calling the hotel directly and not through a travel agent

d. **INTERNET**
Booked at a website on the Internet

e. **IN PERSON**
Booked in person at the hotel, motel, or RV park

f. **GIFT, PRIZE, OR INCENTIVE**
The trip was a gift, prize, or incentive, so the accommodations were booked for you

g. **DON'T KNOW BECAUSE SOMEONE ELSE BOOKED**
Not sure because someone else in your party booked the hotel and you don't know how they did it

HOTEL/MOTEL RATES

1. **HOTEL/TRANSPORTATION PACKAGE DEAL**
   One price that includes your hotel room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

2. **HOTEL/AMENTIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)**
   One price that includes your hotel room ***and*** other items such as shows, meals, or other amenities, but ***does not*** include airfare or bus transportation to Las Vegas.

3. **TOUR/TRAVEL GROUP**
   You are traveling as part of a tour or travel group. The tour/travel group package price includes room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

4. **CONVENTION GROUP/COMPANY MEETING**
   Arranged through an employer or convention.

5. **CASINO RATE**
   Special reduced rate arranged through a casino host or casino employee.

6. **REGULAR FULL-PRICE ROOM RATE**
   Full price, no discounts.

7. **CASINO COMPLIMENTARY**
   Room is free of charge.

8. **ANOTHER RATE**
   Any other special room rate not shown above.

INCOME CATEGORIES

A. Less than $20,000

B. $20,000 to $29,999

C. $30,000 to $39,999

D. $40,000 to $49,999

E. $50,000 to $59,999

F. $60,000 to $69,999

G. $70,000 to $79,999

H. $80,000 to $89,999

I. $90,000 to $99,999

J. $100,000 to $149,999

K. $150,000 or more