

LAUGHLIN VISITOR PROFILE

Calendar Year 2007

Annual Report

January 1, 2007 to December 31, 2007

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By:

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VISITOR PROFILE STUDY

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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 fiscal 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 calendar year timeframe. With data now reported on a calendar 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, 2007 to December 31, 2007. 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

Fourteen percent (14%) of visitors were first-time visitors to Laughlin. Among first-time visitors, 63% said their primary reason for visiting Laughlin was vacation or pleasure, while 12% mentioned gambling. Among repeat visitors, 44% mentioned vacation or pleasure as their primary reason for their current visit (down from past years), while gambling was cited by 41% (up from past years). The average number of Laughlin visits among all visitors in the past year was 2.3, down from prior years, while among repeat visitors it was 2.5, also down from prior years. The average number of visits among all visitors in the past five years is 10.2 (down from previous years), while among repeat visitors it is 11.7 (also down from previous years).

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2003	2004	2005	2006	2007
Proportion of visitors who were first-time visitors	14%	16%	15%	15%	14%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	74%	77%	72%	58%	63%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	9%	4%	8%	18%	12%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	59%	65%	55%	47%	44%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	26%	21%	24%	36%	41%
Average number of visits in past five years (all visitors)	13.5	11.5	11.5	10.5	10.2
Average number of visits in past five years (repeat visitors)	15.5	13.5	13.3	12.1	11.7
Average number of visits in past year (all visitors)	3.8	3.2	3.2	2.5	2.3
Average number of visits in past year (repeat visitors)	4.2	3.6	3.6	2.8	2.5

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (87%), though more arrived by air (13%) than in prior years. Almost nine in ten visitors (93%) 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%). Nearly all visitors (93%) who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin, up significantly over previous years. Forty-eight percent (48%) of visitors who saw shows decided what shows to see after arriving in Laughlin (down considerably over past years). Five percent (5%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2007 (down from last year, but up significantly from previous years), while 7% said they used the Internet to plan their trip (down from previous years). Seventeen percent (17%) of Laughlin visitors visited Las Vegas on their current trip to Laughlin, down slightly from prior years. Only 2% toured other nearby places, down significantly from past years.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2003	2004	2005	2006	2007
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/RV)	93%	93%	93%	88%	87%
Proportion of visitors who traveled to Laughlin by air	7%	7%	7%	12%	13%
Proportion of visitors who traveled to Laughlin from their permanent residence	78%	75%	75%	89%	93%
Proportion of visitors who decided where to stay in Laughlin before arrival	89%	91%	92%	93%	93%
Proportion of visitors who decided where to gamble in Laughlin before arrival	50%	60%	64%	85%	93%
Proportion of visitors who decided which shows to see in Laughlin after arrival	53%	59%	58%	80%	48%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	3%	1%	2%	8%	5%
Proportion of visitors who used the Internet in planning their trip to Laughlin	10%	11%	11%	13%	7%
Proportion of visitors who have visited Las Vegas in the past five years	82%	81%	78%	74%	75%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	18%	18%	20%	20%	17%
Proportion of visitors who toured nearby places	15%	23%	22%	7%	2%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.1, 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 both 2003 and 2004 and 5% in 2005. Their stay averaged 3.0 nights and 4.0 days, up significantly from 2.8 nights and 3.8 days in 2003. Ninety-nine percent (99%) 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 \$41.76 for their room, up significantly from \$31.80 in 2003, \$34.62 in 2004 and \$37.56 in 2005. Eleven percent (11%) 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 \$242.32, up considerably over prior years. The average food and drink expenditures were \$183.26 per trip, down from \$208.22 last year, but up significantly from \$100.17 in 2003 and \$142.71 in 2004. The average local transportation expenditures were \$0.86 per trip, (down from all prior averages). The average total spent on shopping in 2007 was \$40.53, \$2.40 was spent on shows (down from \$3.61 in 2003, \$5.18 in 2004 and \$3.97 in 2005), and an average of \$0.27 was spent on sightseeing (a decrease from all prior averages).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2003	2004	2005	2006	2007
Average number of adults in immediate party	2.1	2.3	2.4	2.0	2.1
Proportion of visitors with persons under 21 in their immediate party	7%	7%	5%	3%	3%
Proportion of visitors who stayed overnight	95%	97%	98%	99%	100%
Days stayed (average)	3.8	3.9	4.1	4.1	4.0
Nights stayed (average)	2.8	2.9	3.1	3.1	3.0
Proportion of visitors who stayed in a hotel or motel room	95%	95%	96%	97%	99%
Number of room occupants (average)	2.1	2.1	2.0	2.0	2.0
Lodging expenditures (average per night — non-package)	\$31.80	\$34.62	\$37.56	\$40.89	\$41.76
Proportion of visitors who bought a package or travel group trip	15%	14%	12%	12%	11%
Average cost of package per person (among package/tour group visitors)	\$157.87	\$183.40	\$189.55	\$223.80	\$242.32
Average trip expenditures for food and drink	\$100.17	\$142.71	\$180.85	\$208.22	\$183.26
Average trip expenditures for local transport	\$11.81	\$16.22	\$9.16	\$3.78	\$0.86
Average trip expenditures for shopping	\$35.94	\$44.25	\$48.57	\$45.24	\$40.53
Average trip expenditures for shows	\$3.61	\$5.18	\$3.97	\$2.78	\$2.40
Average trip expenditures for sightseeing	\$0.63	\$2.09	\$1.75	\$0.97	\$0.27

GAMING BEHAVIOR AND BUDGETS

Nearly all visitors (99.8%) gambled while in Laughlin. Those who gambled budgeted an average of \$787.13, down slightly from last year, but up significantly from all prior averages. Gamblers spent an average of 5.9 hours a day gambling. Gamblers visited an average of 1.5 different casinos in 2007, similar to last year, but down from 2.5 in 2003, 2.4 in 2004, and 2.5 in 2005. Seventy-seven percent of (77%) gamblers played slot machines or video machines most often. Among these visitors, 45% played quarter machines most often (down from 59% in 2003, 56% in 2004, 54% in 2005, and 51% last year), while play on penny machines continues to increase (from 17% last year to 29% in 2007). The average number of coins or tokens per play was 16.8, up significantly from all prior years. Seventeen percent (17%) played table games most often; among these visitors, 70% typically played a \$5.00 minimum (up from all prior years), with an average bet of \$4.85, down significantly from \$9.76 in 2003, \$14.00 in 2004, \$12.21 in 2005, and \$7.47 last year.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2003	2004	2005	2006	2007
Proportion who gambled while visiting Laughlin	96%	97%	97%	99%	99.8%
Average trip gambling budget (among those who gambled)	\$490.84	\$533.03	\$559.35	\$846.65	\$787.13
Average hours per day spent gambling (among those who gambled)	5.5	5.8	5.6	6.2	5.9
Average number of different casinos visited (among those who gambled)	2.5	2.4	2.5	1.4	1.5
Proportion who played slot/video machines most often (among those who gambled)	77%	77%	79%	81%	77%
Proportion who played quarter machines most often (among those who played machines)	59%	56%	54%	51%	45%
Proportion who played penny machines most often (among those who played machines)	NOT ASKED	NOT ASKED	NOT ASKED	17%	29%
Average number of coins/tokens per play (among those who played machines)	5.1	6.0	7.6	10.4	16.8
Proportion who played table games most often (among those who gambled)	19%	18%	18%	16%	17%
Proportion who played \$5.00 table minimums most often (among those who played table games)	56%	54%	56%	55%	70%
Average bet (among those who played table games)	\$9.76	\$14.00	\$12.21	\$7.47	\$4.85

ATTITUDINAL INFORMATION

The vast majority (97%) of visitors reported that they were “very satisfied” with their trip to Laughlin, up from 93% in 2003, 94% in 2004, and 95% in 2005. Among the few visitors who said they were only “somewhat” satisfied with their trip, most had hotel complaints (59%), while complaints about not winning enough gambling decreased from 39% in 2003 and 37% in 2005 to 14% in 2007.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2003	2004	2005	2006	2007
Proportion who were “very satisfied” with their current trip to Laughlin	93%	94%	95%	96%	97%
Proportion who complained about their hotel (among those who were “somewhat satisfied”)	32%	62%	27%	68%	59%
Proportion who complained about not winning enough money (among those who were “somewhat satisfied”)	39%	15%	37%	3%	14%

VISITOR DEMOGRAPHICS

Three-quarters (78%) of visitors were married. Three in ten visitors were from Southern California (30%, down from 38% in 2003 and 39% in 2004), while 6% were foreign visitors (similar to last year, but up from 3% in 2003 and 4% each in 2004 and 2005). Forty-four percent (44%) of visitors were 65 or older, up significantly from 38% in 2003, and the average age was 60.9, up from 58.4 in 2003. Visitors are still more likely to be retired (54%, down significantly from 59% each in 2004 and 2005) than employed (43%, up from 38% in 2004 and 35% in 2005). The largest proportion of visitors have a high school diploma or less (44%, up from 39% each in 2003 and 2005, and 40% in 2004). More than one-half (56%) have a household income of less than \$60,000.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2003	2004	2005	2006	2007
Proportion of visitors who were married	76%	77%	77%	76%	78%
Proportion of visitors who were from the Southern California	38%	39%	34%	31%	30%
Proportion of visitors who were foreign	3%	4%	4%	7%	6%
Proportion of visitors who were 50 years old or older	75%	79%	82%	79%	81%
Proportion of visitors 65 years old or older	38%	45%	44%	44%	44%
Average age	58.4	60.4	60.9	60.3	60.9
Proportion of visitors who were retired	54%	59%	59%	53%	54%
Proportion of visitors who were employed	43%	38%	35%	45%	43%
Proportion of visitors with a high school diploma or less	39%	40%	39%	44%	44%
Proportion of visitors with a household income less than \$60,000	54%	49%	42%	49%	56%

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, 2007 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2003	2004	2005	2006	2007
Days stayed (average)	3.8	3.9	4.1	4.1	4.0
Nights stayed (average)	2.8	2.9	3.1	3.1	3.0
Proportion of visitors who stayed overnight	95%	97%	98%	99%	100%
Proportion of visitors who stayed in a hotel or motel room	95%	95%	96%	97%	99%
Lodging expenditures (average per night — non-package)	\$31.80	\$34.62	\$37.56	\$40.89	\$41.76
Proportion of visitors who bought a package or travel group trip	15%	14%	12%	12%	11%
Average cost of package per person (among package/tour group visitors)	\$157.87	\$183.40	\$189.55	\$223.80	\$242.32
Number of room occupants (average — hotel/motel only)	2.1	2.1	2.0	2.0	2.0
Average trip expenditures for food and drink	\$100.17	\$142.71	\$180.85	\$208.22	\$183.26
Average trip expenditures for local transportation	\$11.81	\$16.22	\$9.16	\$3.78	\$0.86
Average trip expenditures for shopping	\$35.94	\$44.25	\$48.57	\$45.24	\$40.53
Average trip expenditures for shows	\$3.61	\$5.18	\$3.97	\$2.78	\$2.40
Average trip expenditures for sightseeing	\$0.63	\$2.09	\$1.75	\$0.97	\$0.27
Proportion who gambled while visiting Laughlin	96%	97%	97%	99.5%	99.8%
Average trip gambling budget (among those who gambled)	\$490.84	\$533.03	\$559.35	\$846.65	\$787.13

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

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 2007. 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 2007 study and compares them to the results of the 2003, 2004, 2005 and 2006 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 five years, it is because the question was not asked for all five years.

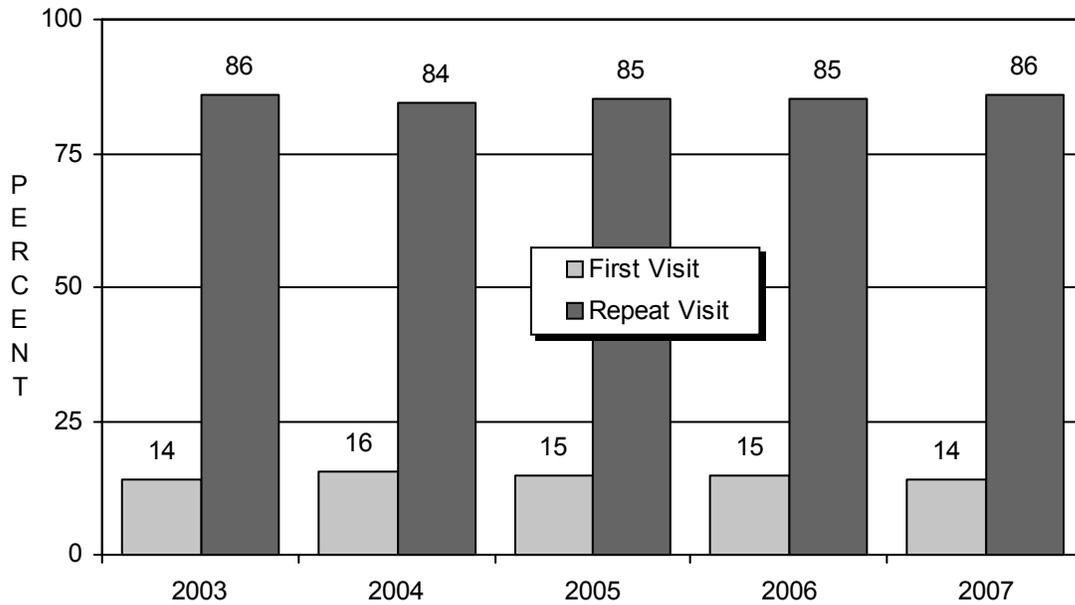
Details on the findings and conclusions of the survey are presented in the following sections of this report.

SUMMARY OF FINDINGS

REASONS FOR VISITING

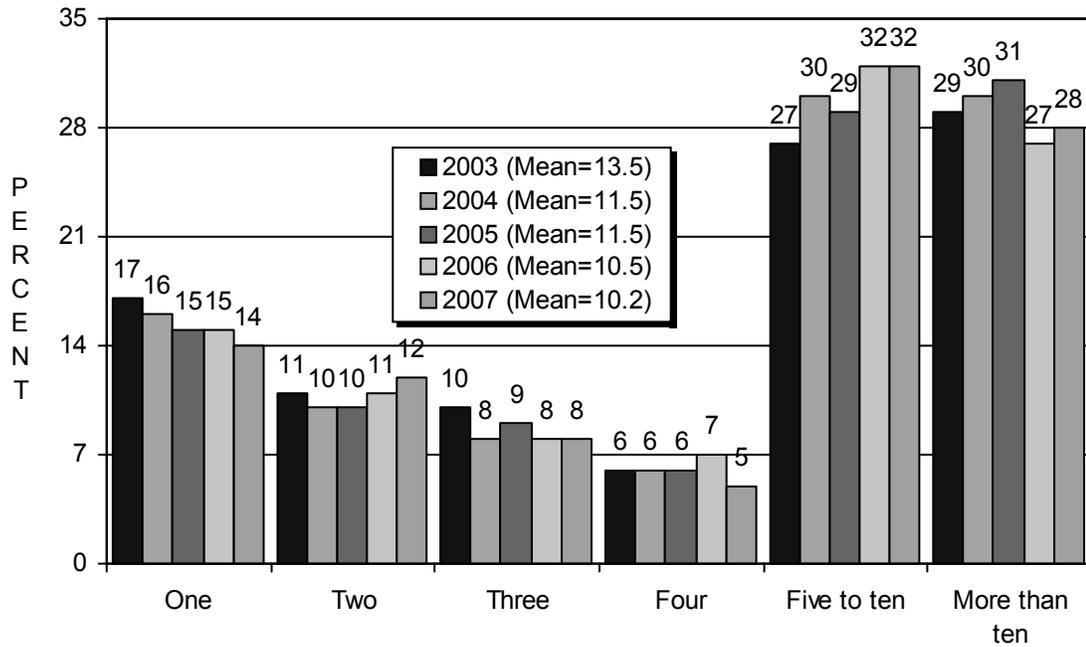
In the current study, 86% of visitors said they had visited Laughlin more than once, and 14% were first-time visitors — essentially unchanged since 2003 (Figure 1).

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.

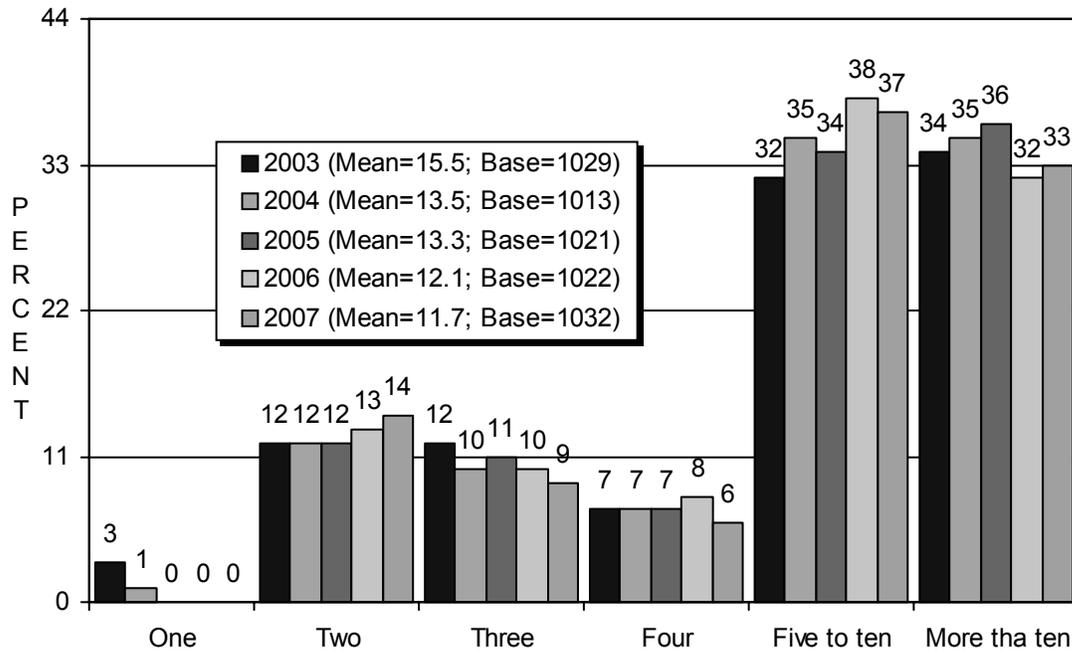
FIGURE 2
 Frequency Of Visits In Past Five Years*
 (Among All Visitors)



The average number of visits to Laughlin in the past five years *among all visitors* was 10.2 in this year's survey, down significantly from 13.5 in 2003, and 11.5 in both 2004 and 2005 (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.

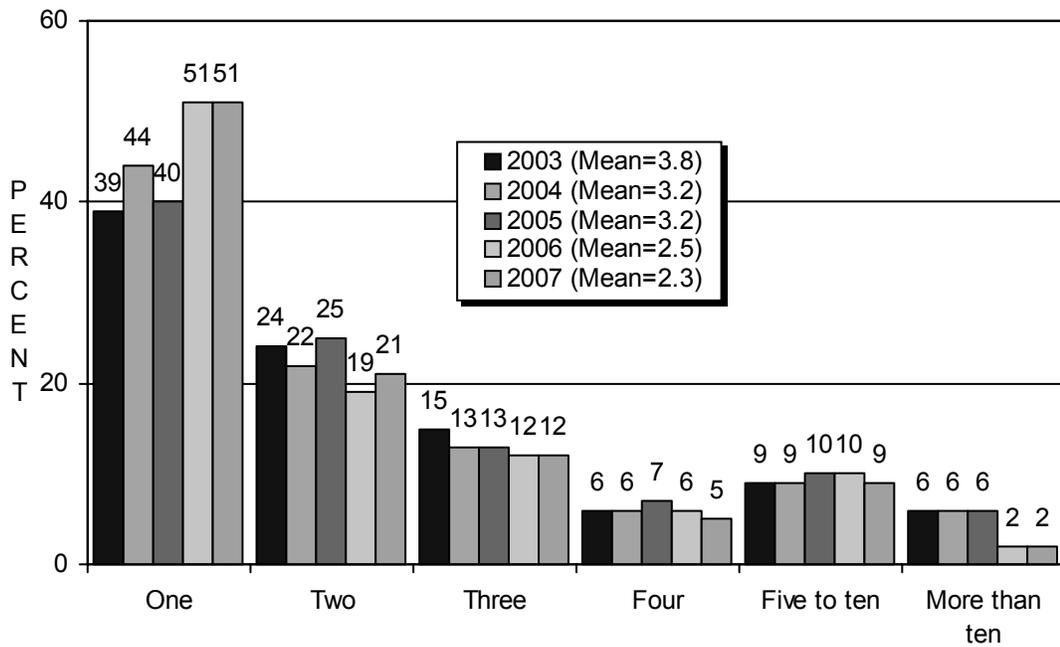
FIGURE 3
Frequency Of Visits In Past Five Years*
(Among Repeat Visitors)



The average number of visits to Laughlin during the past five years *among repeat visitors* was 11.7, down significantly from 15.5 in 2003, 13.5 in 2004, and 13.3 in 2005 (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.

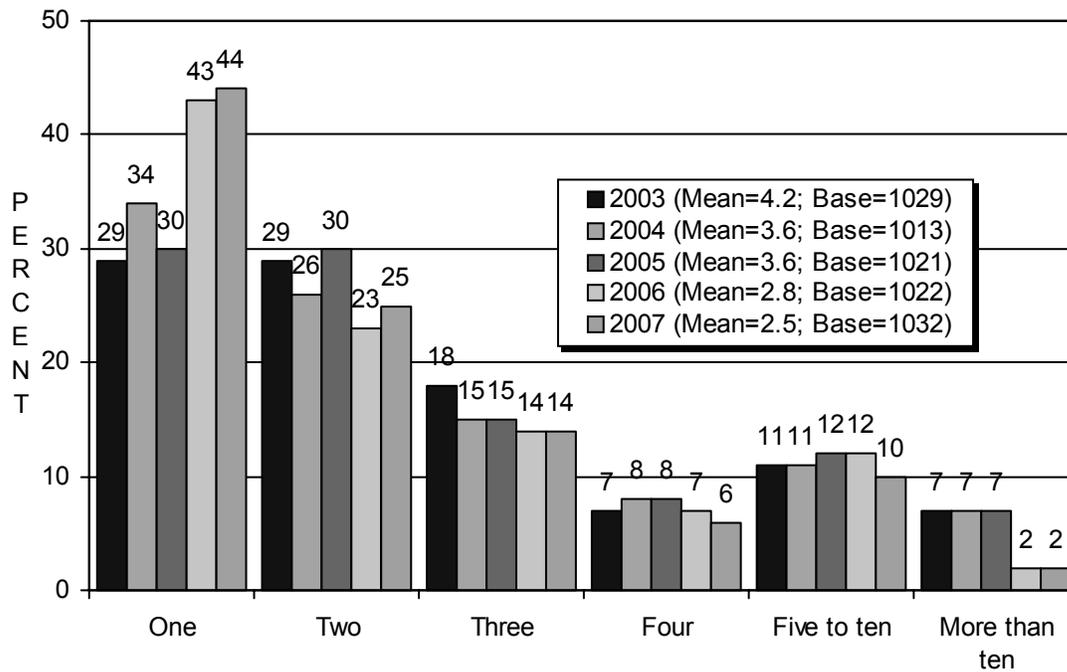
FIGURE 4
Frequency Of Visits In Past Year*
(Among All Visitors)



Among *all visitors*, the average number of visits in the past year was 2.3 times, down significantly all prior years. Fifty-one percent (51%) reported visiting Laughlin only once in the past year, the same as last year, but 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.

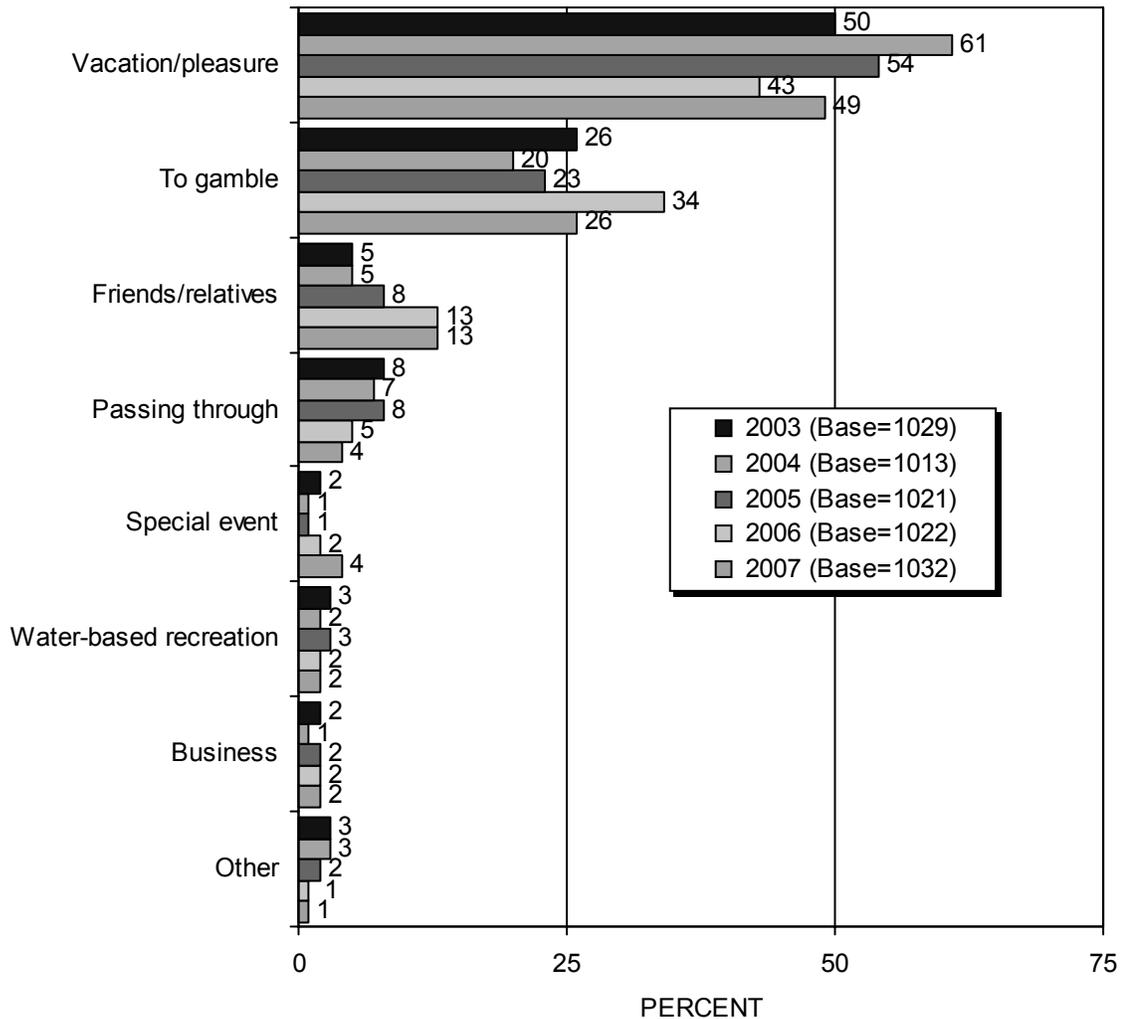
FIGURE 5
Frequency Of Visits In Past Year*
(Among Repeat Visitors)



During the past year, repeat visitors averaged 2.5 trips to Laughlin, down from all prior years. Among repeat visitors 44% 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% 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.

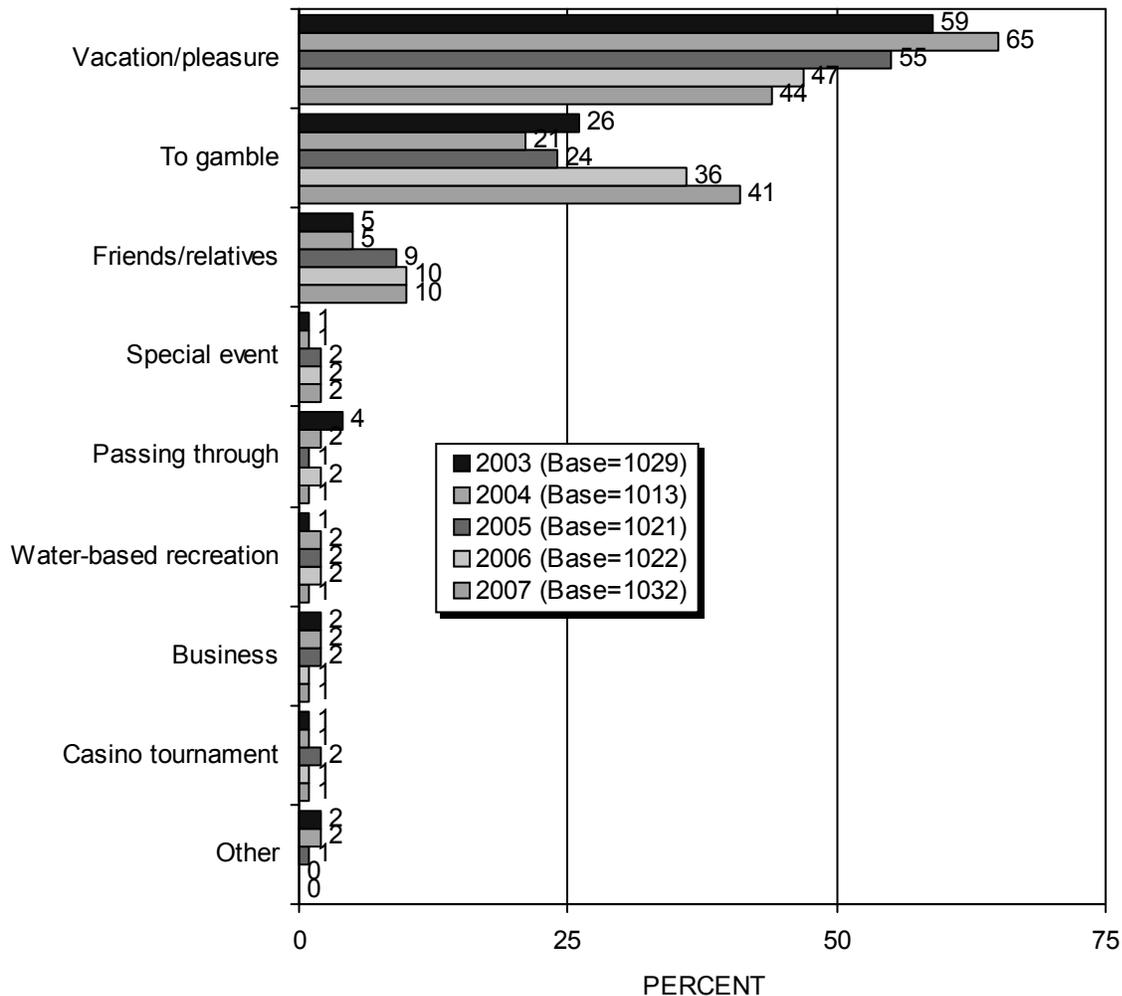
FIGURE 6
Primary Purpose Of First Visit*
(Among Repeat Visitors)



Forty-nine percent (49%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure, an increase from 43% last year, but a significant decrease from 61% in 2004, and 54% in 2005 (Figure 6). Twenty-six percent (26%) said they first came to Laughlin for gambling, down from 34% last year, but up from 20% in 2004. Thirteen percent (13%) first came to Laughlin to visit family or friends, up from 5% in both 2003 and 2004 and 8% in 2005. Four percent (4%) first came to Laughlin for a special event, up from all 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.

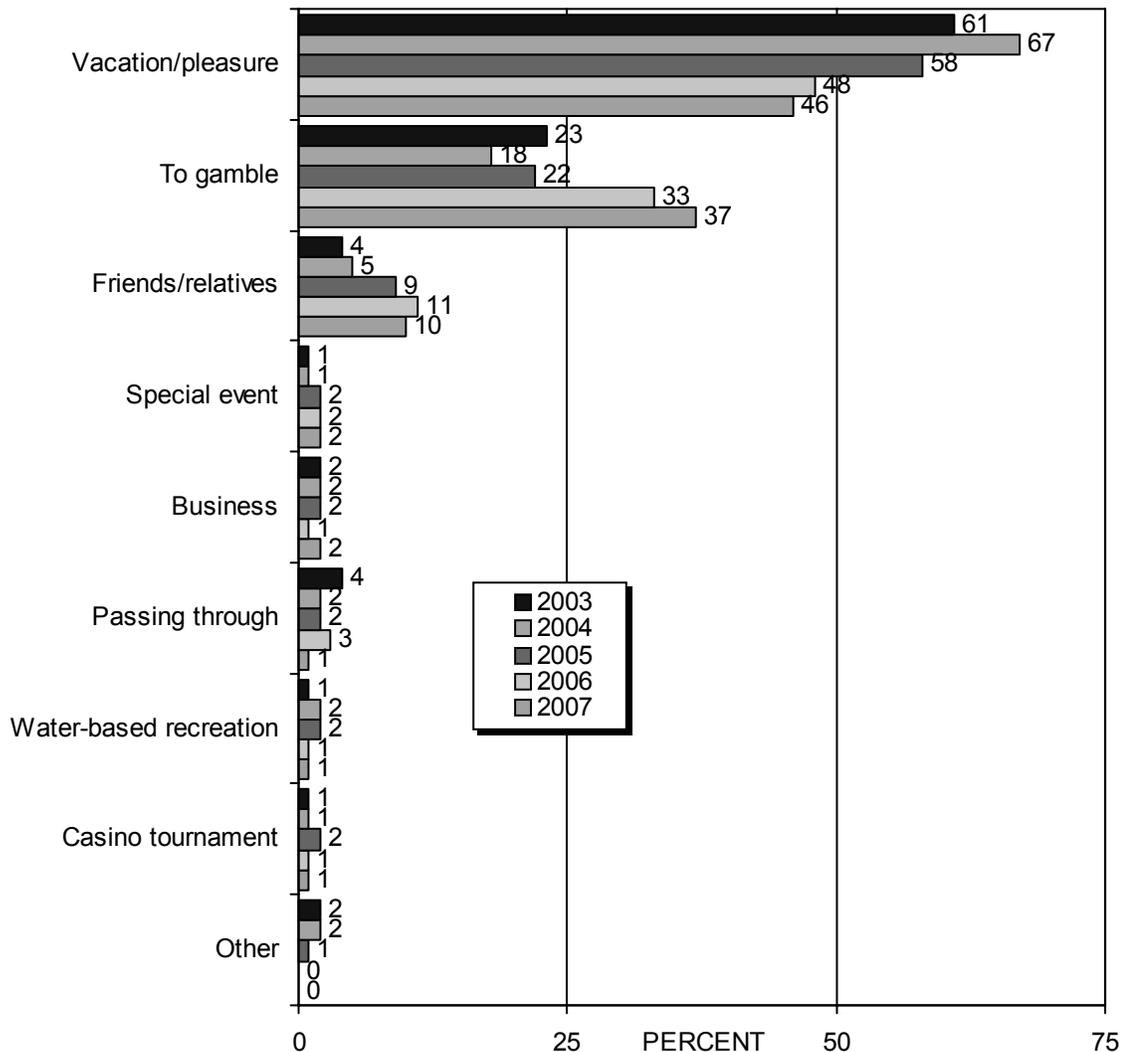
FIGURE 7
Primary Purpose Of Current Visit*
(Among Repeat Visitors)



Among repeat visitors, the proportion of those who said that the primary purpose for their *current* visit to Laughlin was vacation or pleasure (44%) was down significantly from 59% in 2003, 65% in 2004, and 55% in 2005. The proportion who said they came to gamble was 41%, up from all prior years. Ten percent (10%) said they came to visit friends or family, (the same as last year, but up from 5% in 2003 and 2004), and 2% came for a special event (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 2007 who reported that the primary purpose for their current visit to Laughlin was vacation or pleasure (46%) was similar to last year, but down significantly from 2003 (61%), 2004 (67%), and 2005 (58%) (Figure 8). The proportion of all visitors who said gambling was the primary reason for their current visit (37%) was up slightly from last year (33%) and up significantly from 23% in 2003, 18% in 2004, and 22% in 2005. Ten percent (10%) said they came to visit friends or relatives (up from 4% in 2003 and 5% in 2004), and 2% came 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 9
 Primary Purpose Of First Visit vs. Current Visit — 2007
 (Among Repeat Visitors)

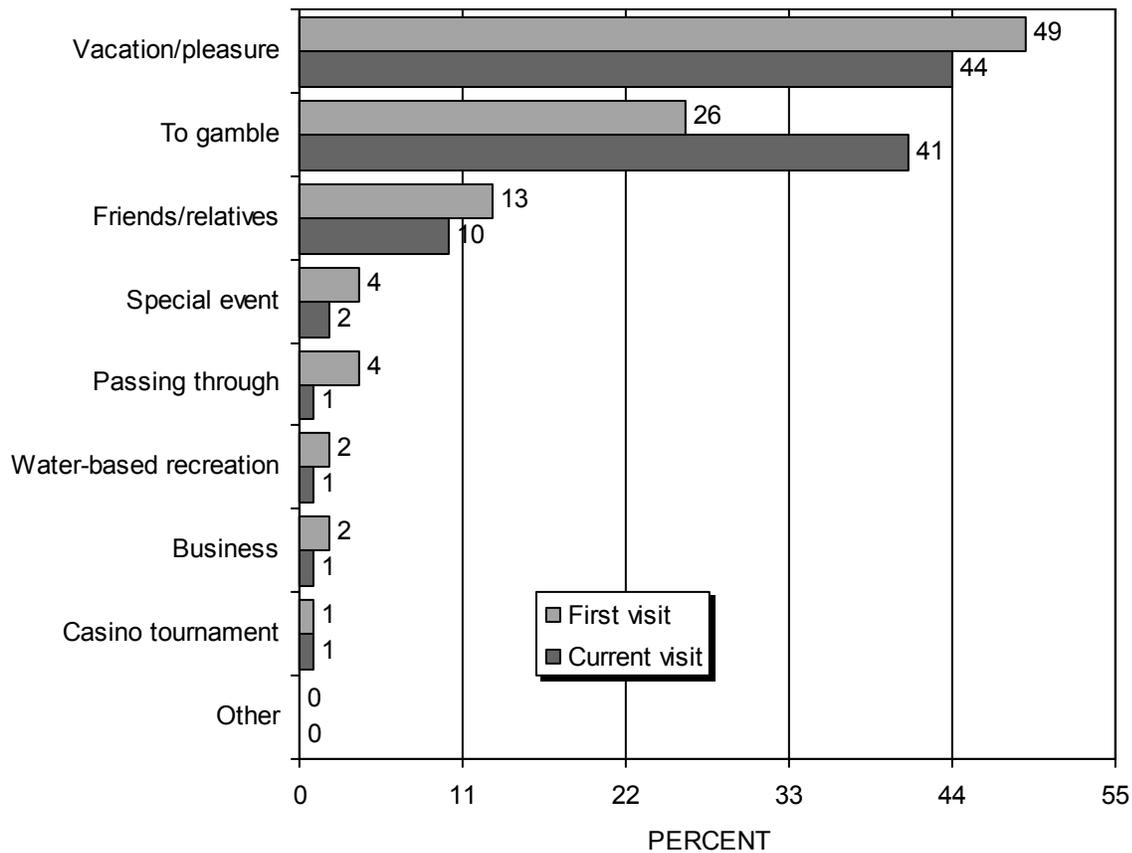


Figure 9 compares the reasons given by *repeat visitors* for their first Laughlin visit versus their current visit in 2007. A significantly higher proportion of repeat visitors said the purpose of their first trip was visiting friends and relative (13% vs. 10%), vacation or pleasure (49% vs. 44%) or “just passing through” (4% vs. 1%). Repeat visitors were significantly more likely to say the purpose of their current visit was gaming (41% vs. 26%).

FIGURE 10
 Primary Purpose Of Current Visit — 2007
 (First-Time vs. Repeat Visitors)

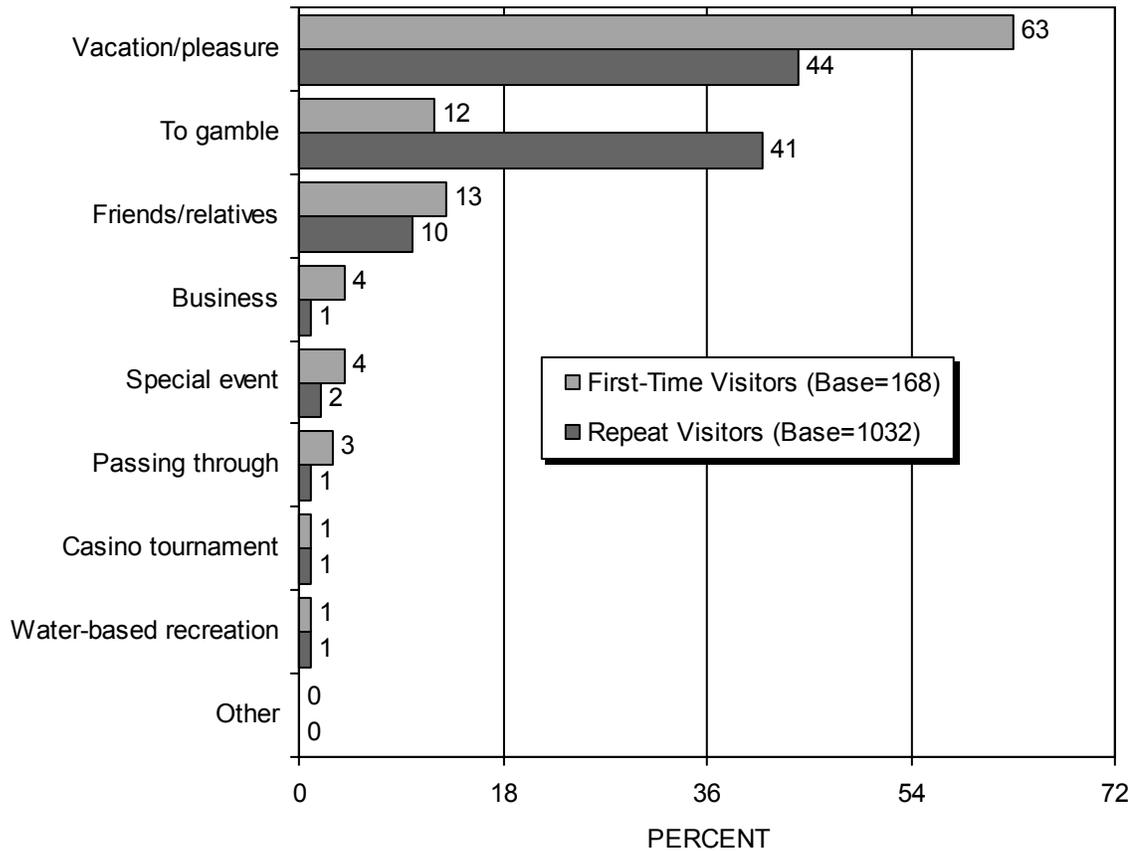
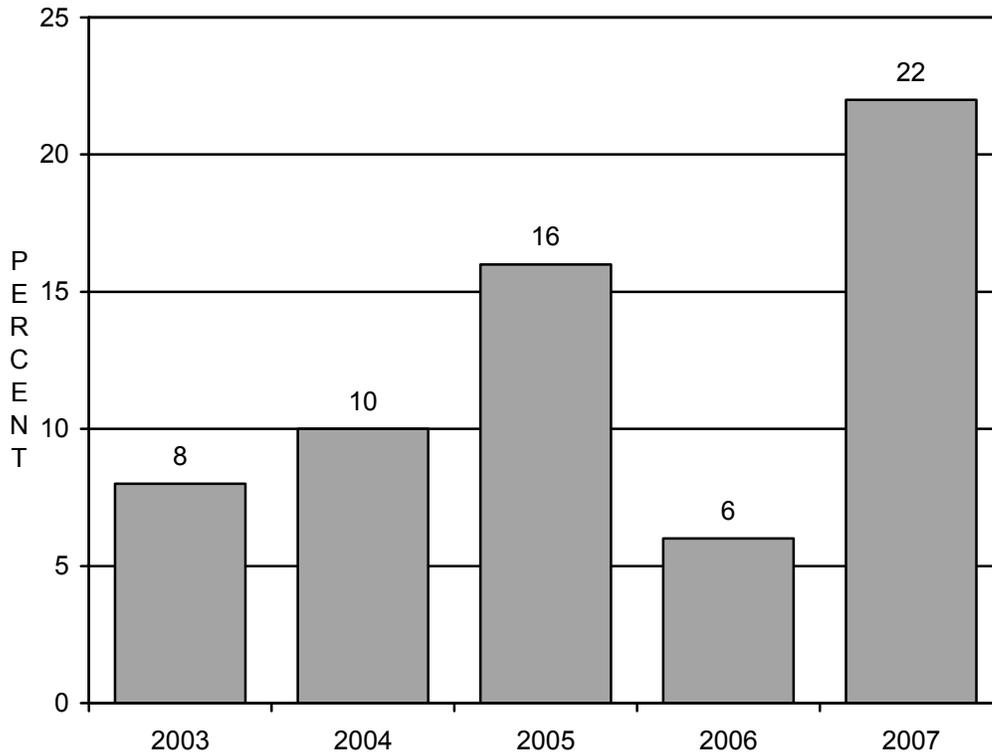


Figure 10 compares *first-time visitors* with *repeat visitors* in terms of purpose of their *current* visit to Laughlin in 2007. First-time visitors (63%) were significantly more likely than repeat visitors (44%) to say their current visit to Laughlin was for vacation or pleasure, or to visit friends and relatives (13% vs. 10%). Repeat visitors (41%) were significantly more likely than first-time visitors (12%) to report visiting Laughlin primarily to gamble.

FIGURE 11
Gaming Tournaments*

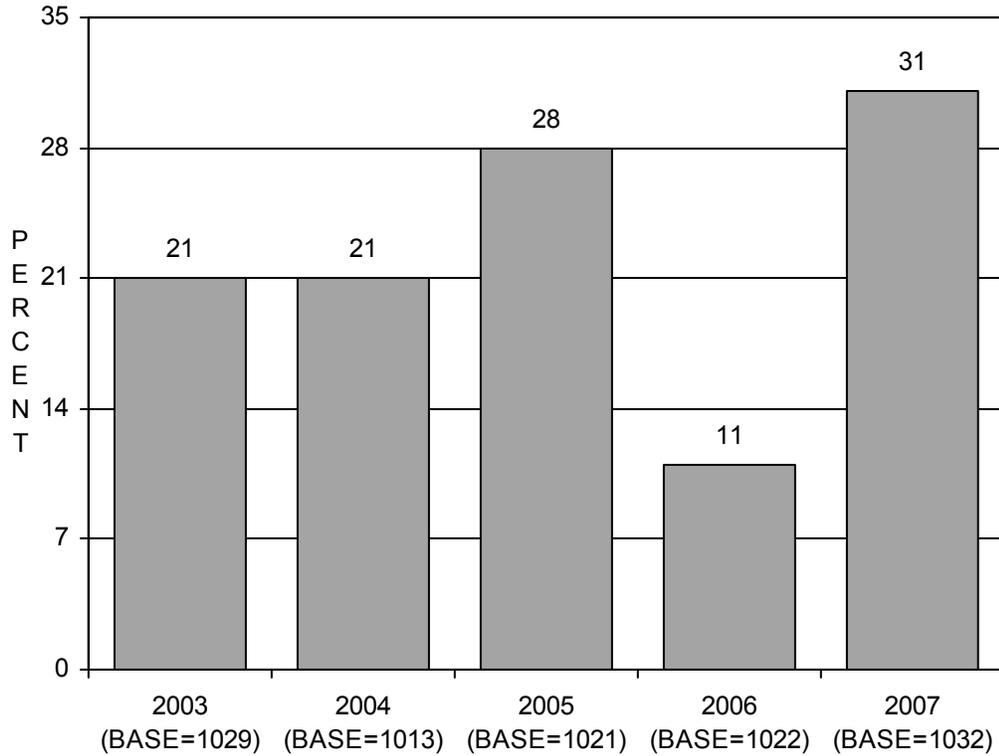


We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). More than one in five (22%) of visitors said they planned to participate in a gaming tournament, up significantly from all previous waves of the study.

* 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). Thirty-one percent (31%) said they had, up significantly from 21% in 2003 and 2004, and 11% last year.

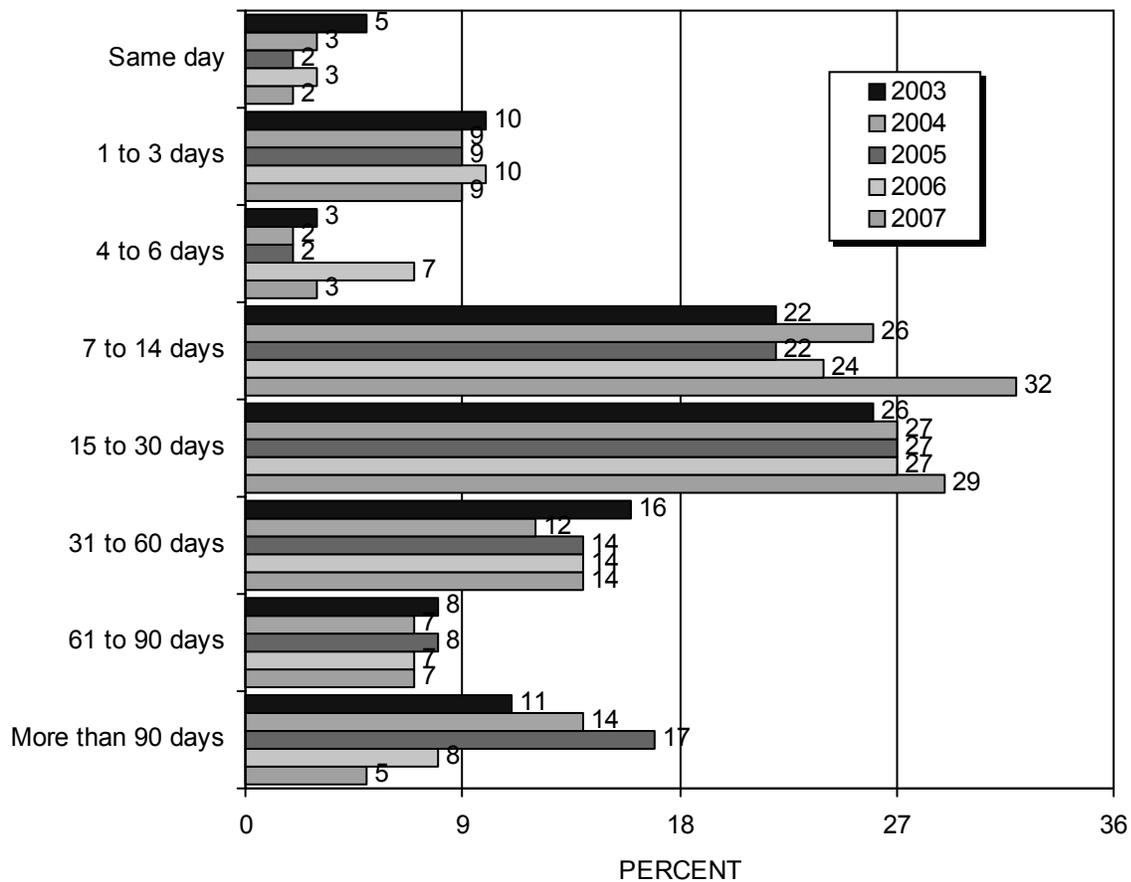
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

Only "yes" responses are reported in this chart.

TRAVEL PLANNING

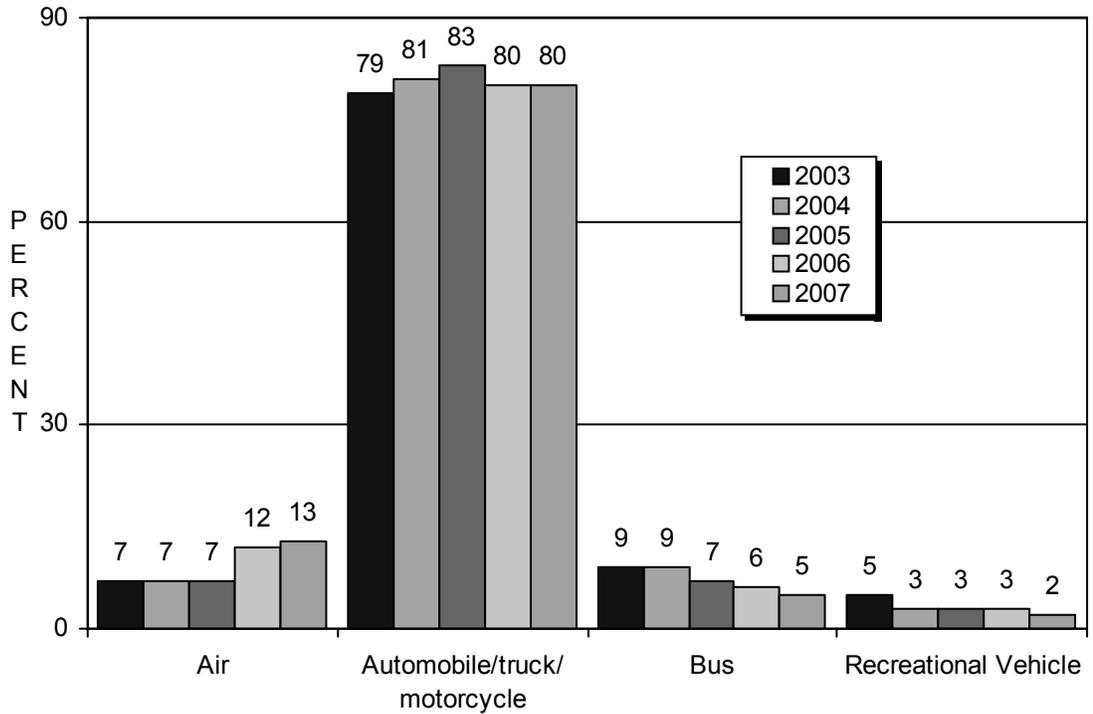
Travel planning varied broadly — from same-day planning to travel plans made more than 90 days in advance (Figure 13). The percentage of visitors planning their Laughlin trip seven to 30 days in advance (61%) increased significant from all prior years, while those planning more than 30 days in advance (26%) declined.

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.

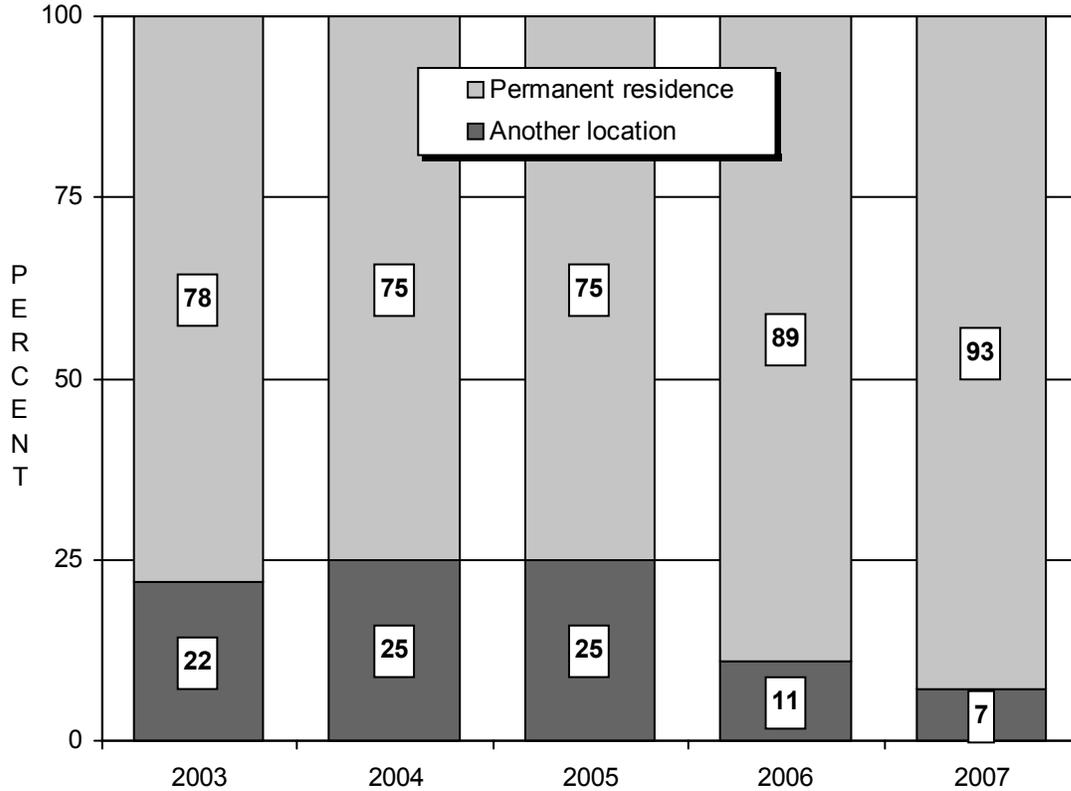
FIGURE 14
 Transportation To Laughlin*



As in past years, most visitors traveled to Laughlin by automobile, truck, or motorcycle (80%) (Figure 14). Five percent (5%) traveled by bus, down from 9% in 2003 and 2004, 13% said they came by air (up from 7% each in 2003 to 2005), and 2% came in an RV, down from 5% 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.

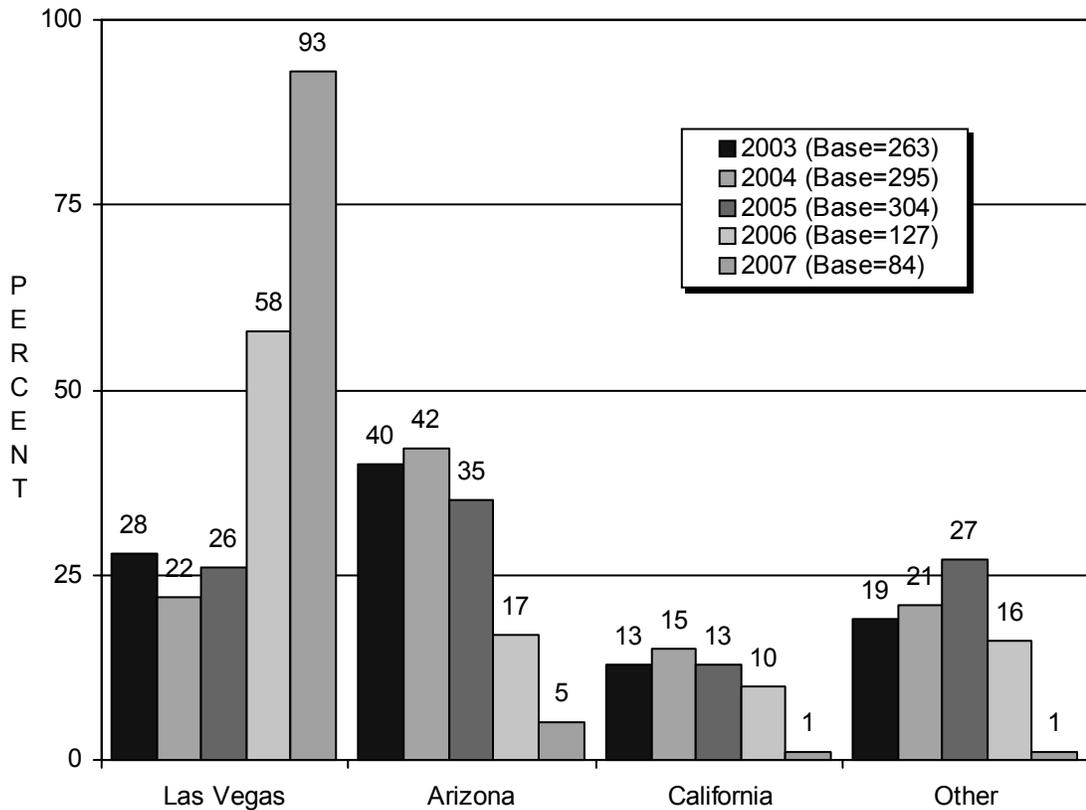
FIGURE 15
Whether Visitors Came To Laughlin From Their
Permanent Residence Or From Some Other Location*



In 2007, more than nine in ten visitors (93%) arrived in Laughlin directly from their permanent residences, up significantly from all prior years (Figure 15). Conversely, 7% said they came to Laughlin from another location, down from all 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.

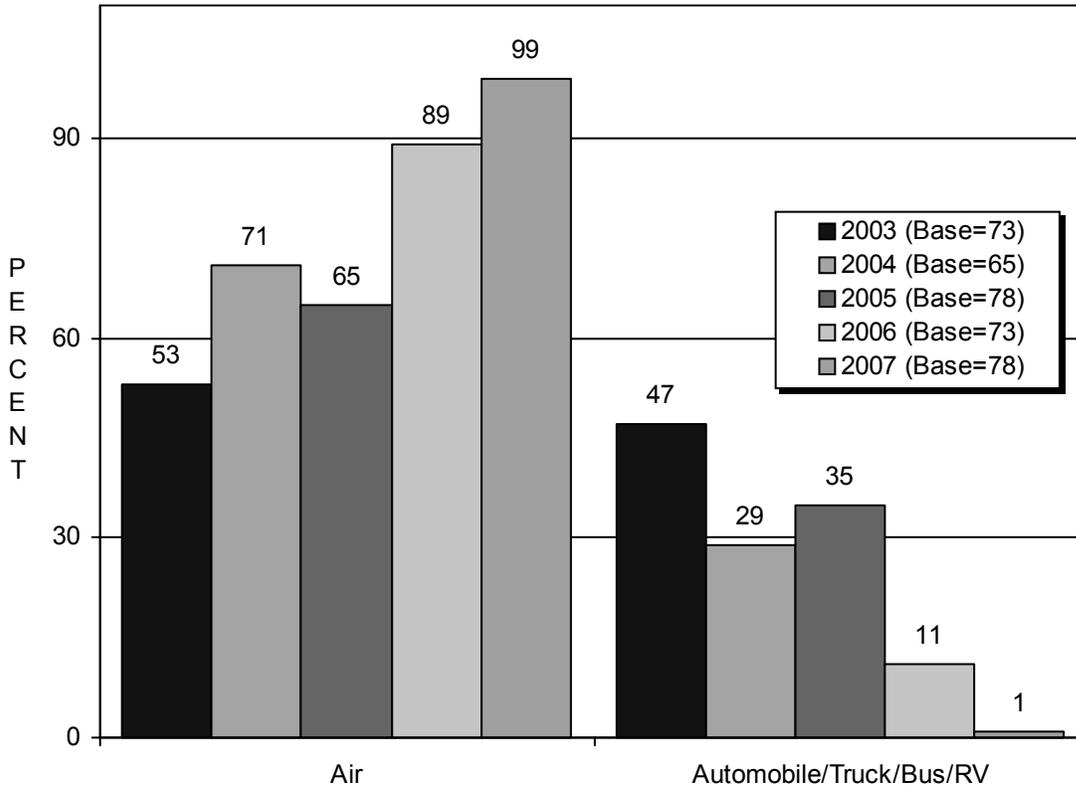
FIGURE 16
Where Visitors Came From*
 (Among Those Who Did Not Come To Laughlin
 Directly From Their Permanent Residence)



Among those who came to Laughlin after visiting another location, 93% came from Las Vegas, a significant increase from prior years, while 5% came from Arizona, 1% from California, and 1% from some other location — all down from prior years (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.

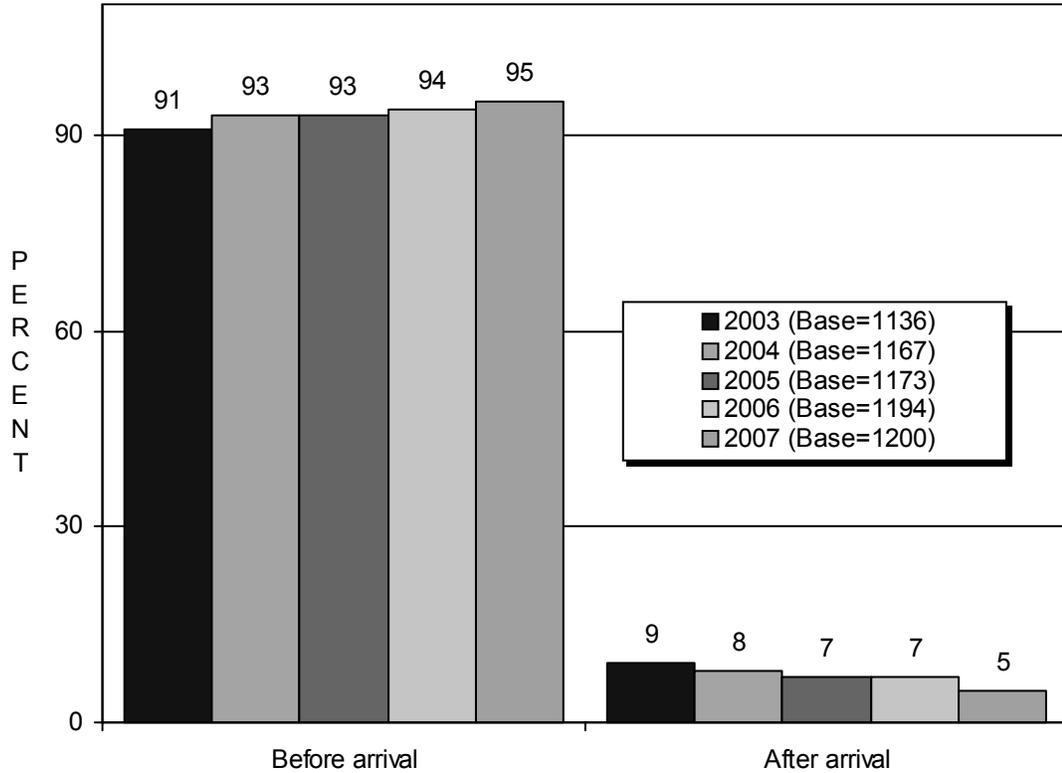
FIGURE 17
Transportation To Las Vegas*
(Among Those Who Traveled To Laughlin From Las Vegas)



We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Nearly all (99%) arrived by air (a significant increase from all prior years), and only 1% arrived by ground transportation (a decrease from 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.

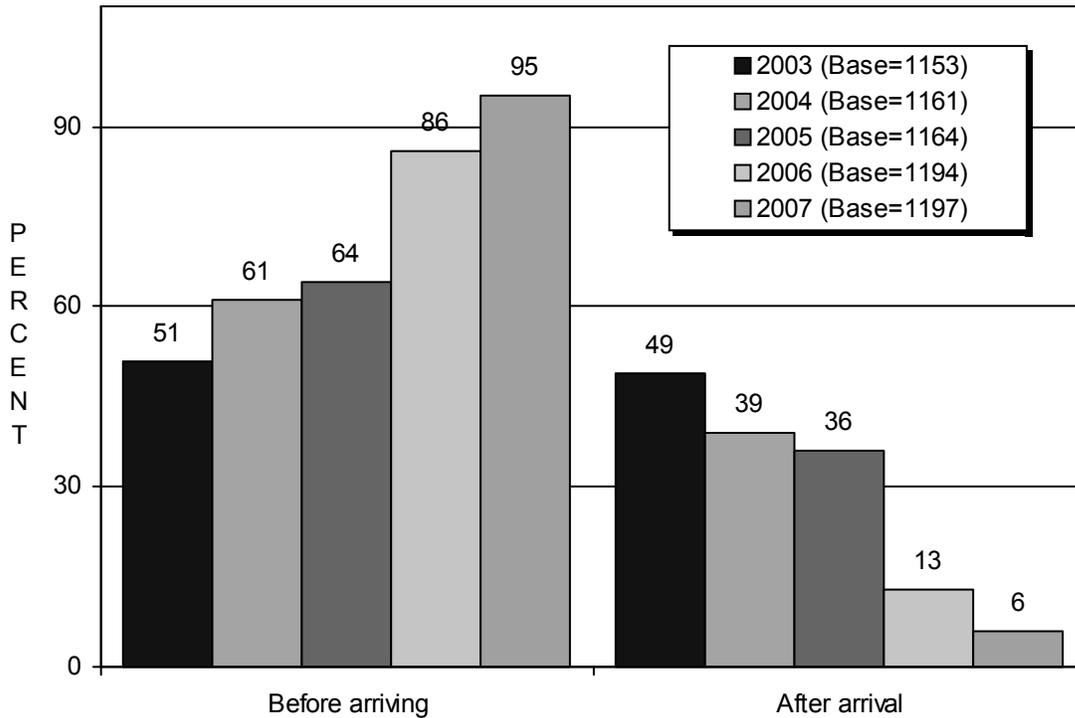
FIGURE 18
When Decided Where To Stay*
(Among Those Who Stayed Overnight)



In 2007, most visitors decided where to stay in Laughlin prior to their visits (95%, up from 91% in 2003 and 93% in 2004), while 5% decided after arrival (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.

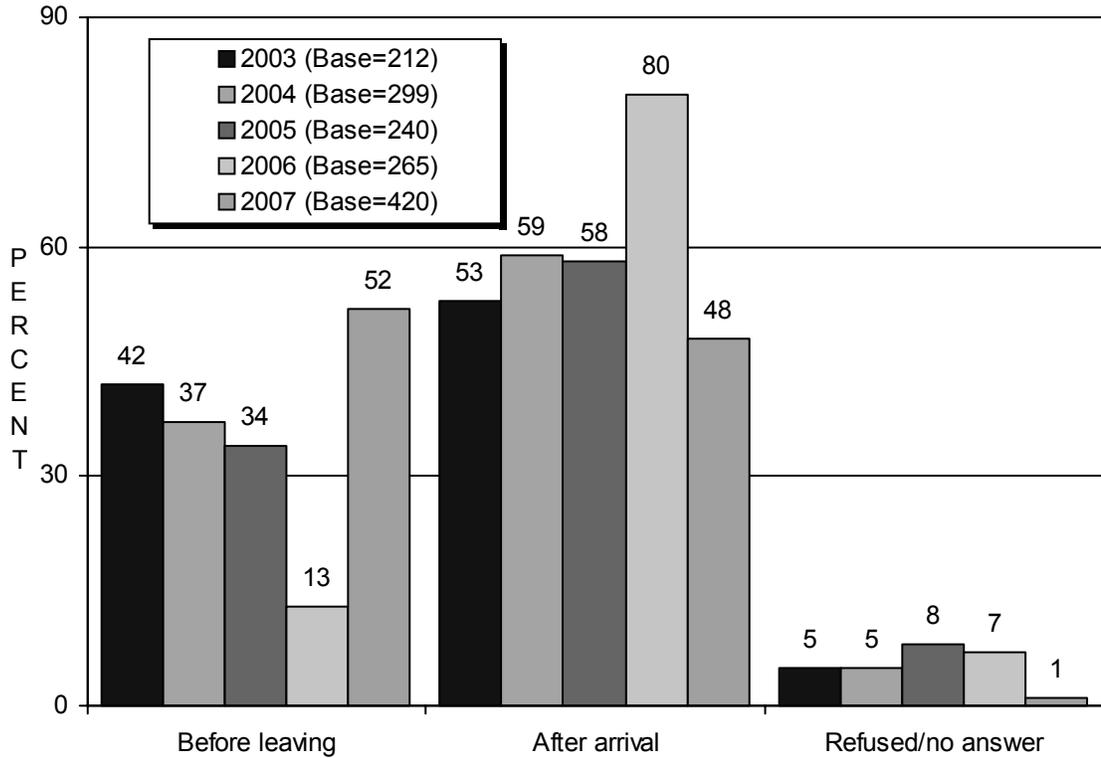
FIGURE 19
When Decided Where To Gamble*
(Among Those Who Gambled)



Ninety-five percent (95%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin, up significantly from all prior years (Figure 19). Six percent (6%) reported making their decision about where to gamble after they arrived, down from all 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.

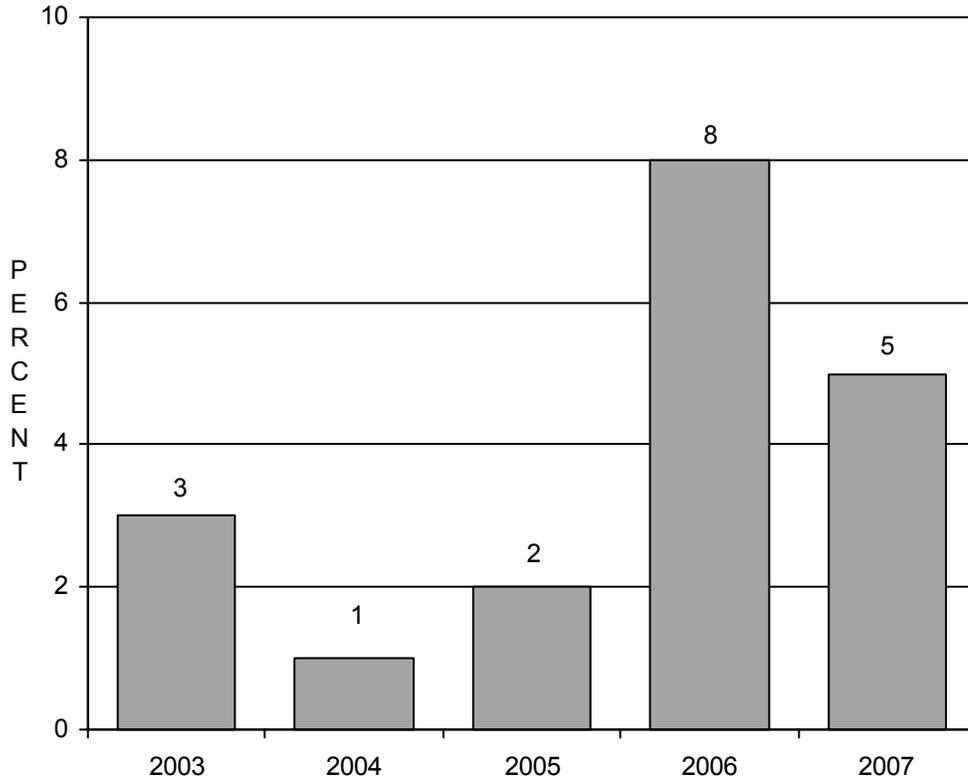
FIGURE 20
When Decided Which Shows To See*
(Among Those Who Saw Shows)



Among visitors who reported going to see a show, 48% decided what shows to see after arriving in Laughlin, a significant decrease from 59% in 2004, 58% in 2005, and 80% last year (Figure 20). Forty-two percent (42%) of visitors decided what shows to see before arriving in Laughlin, an increase from 37% in 2004, 34% in 2005, and 13% 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)

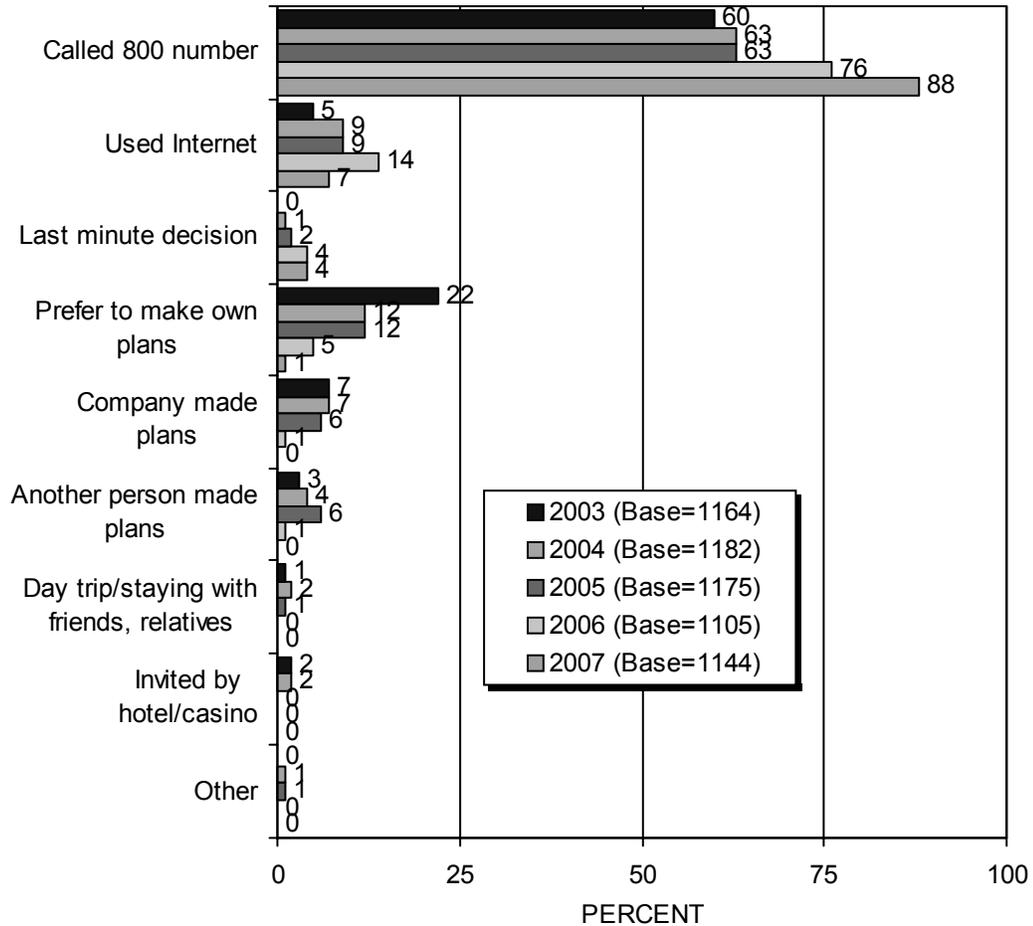


Five percent (5%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2007, a significant increase from 3% in 2003, 1% in 2004, and 2% in 2005, but a decrease from 8% last year (Figure 21).

* 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.

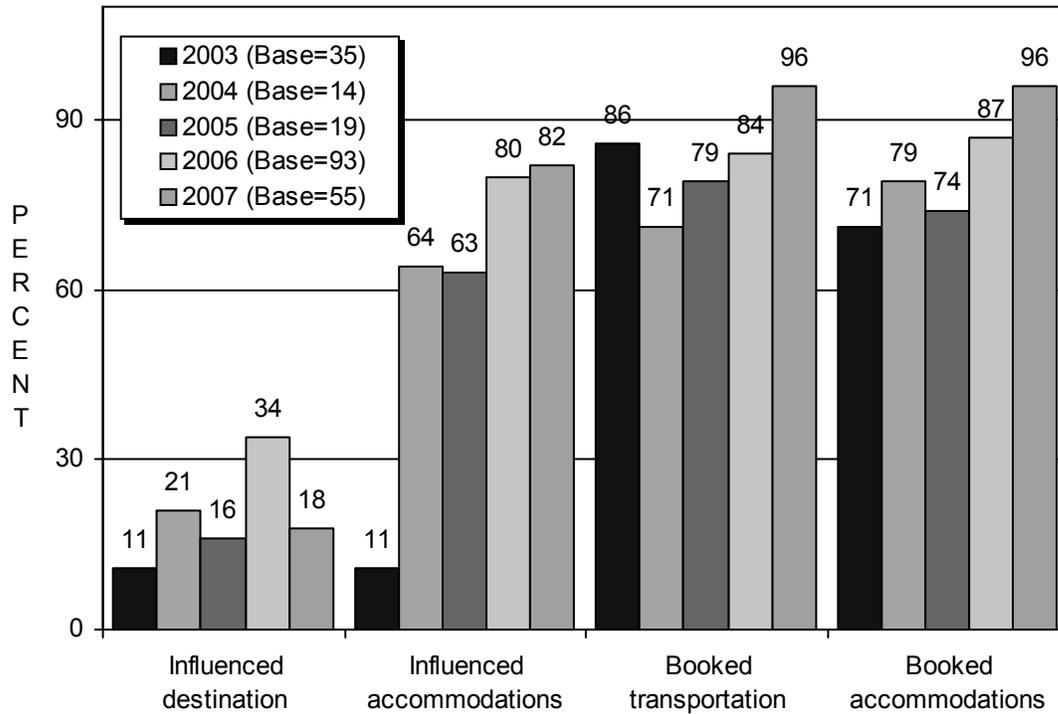
FIGURE 22
 Main Reason For Not Using A Travel Agent*
 (Among Those Not Using Travel Agent)



Visitors were asked to indicate the primary reason why they did not use a travel agent to help with their travel arrangements (Figure 22). Eighty-eight percent (88%) said it was because they used an 800 number, a significant increase over all prior years. Seven percent (7%) said they used the Internet to make their travel arrangements, down significantly from 9% in both 2004 and 2005 and 14% last year. Four percent (4%) said it was a last minute decision and there was no time to call a travel agent, the same as last year, but up from 2% or less from 2003 through 2005. Only 1% said they preferred to make their own plans, down from all 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 23
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)

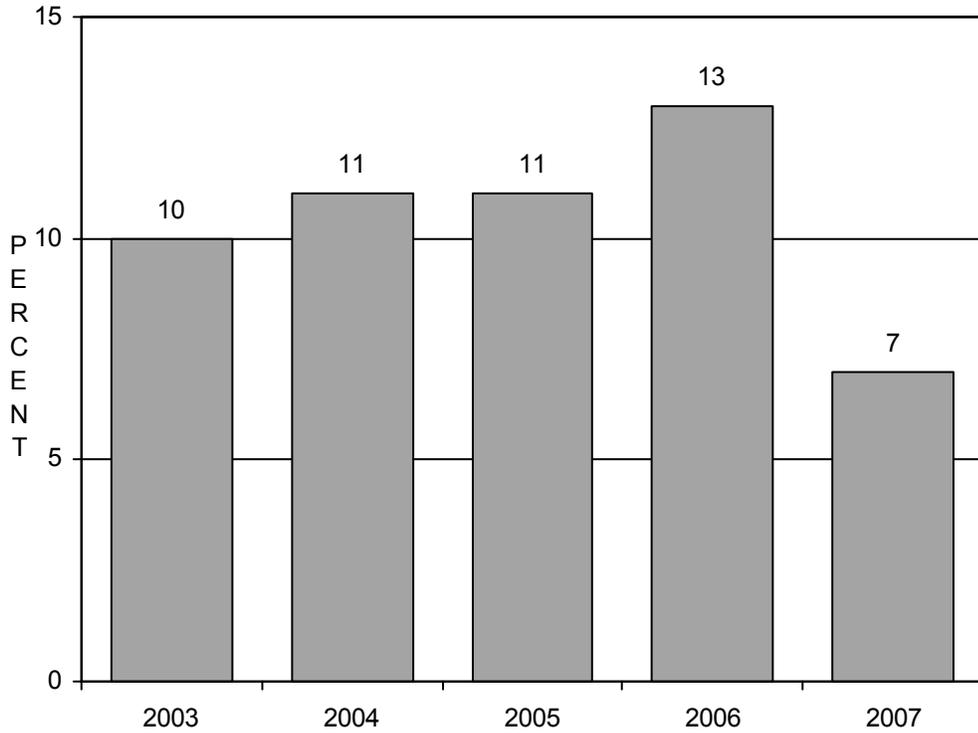


Among visitors who reported using a travel agent, nearly all (96%) had help with booking their transportation (up from prior years), and 96% had travel agents help them book their accommodations (also up from prior years) (Figure 23). Eighty-two percent (82%) said the agent influenced their choice of accommodations, up from 11% in 2003, and 18% said the travel agent influenced their decision to visit Laughlin, down from 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.

Base sizes in 2004 and 2005 are too small to allow reliable statistical comparisons with other years.

FIGURE 24
Whether Used Internet To Plan Trip*

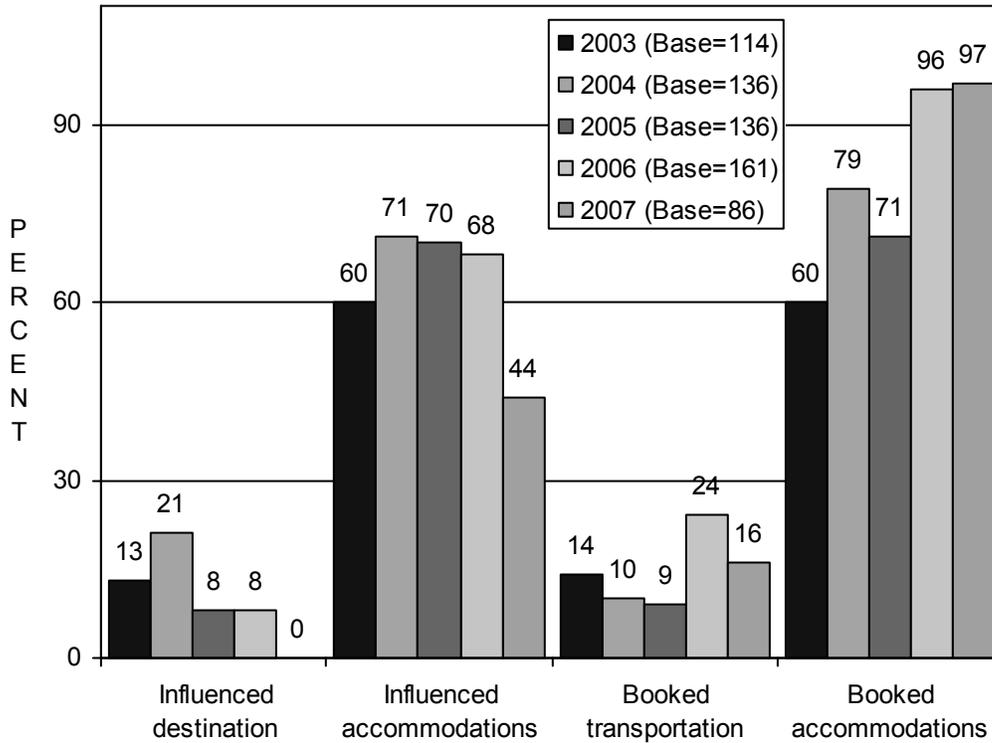


Only 7% of visitors said they used the Internet to plan their trip to Laughlin, down from all prior years (Figure 24).

* 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)

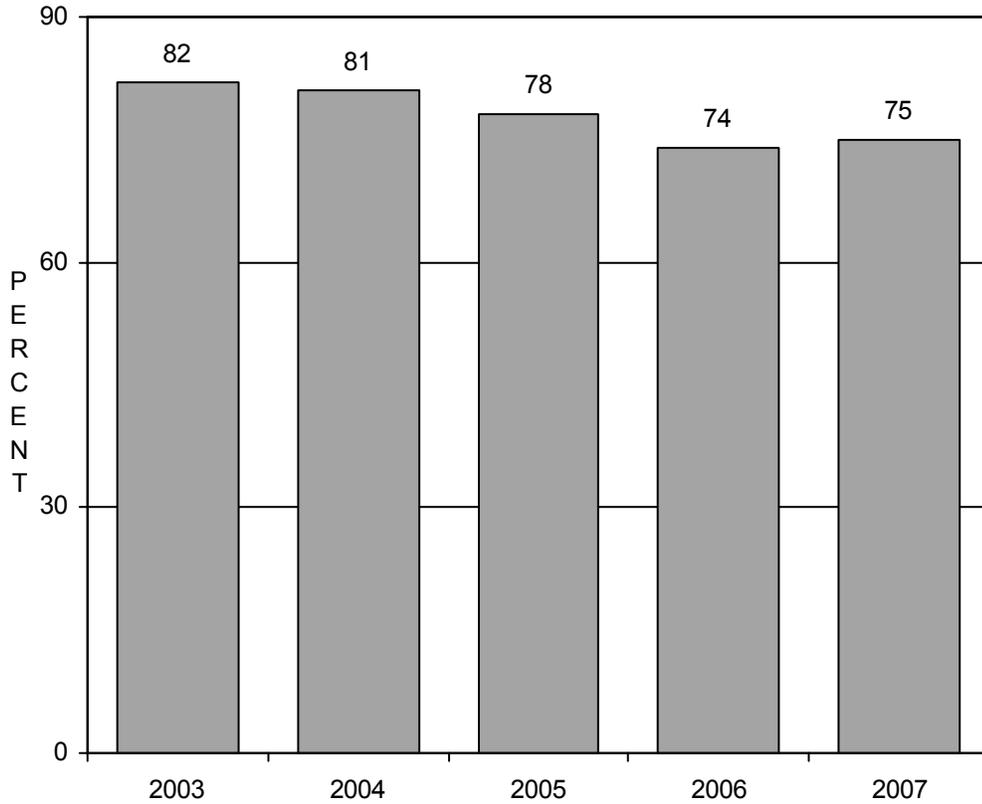


Among visitors who used the Internet to plan their trip, 44% said the Internet influenced their choice of accommodations (down from all prior years), and 97% booked their accommodations online (similar to last year, but a significant increase from 60% in 2003, 79% in 2004, and 71% in 2005). Sixteen percent (16%) said they booked transportation to Laughlin through the Internet, a decrease from 24% in 2006, while none of the visitors who used the Internet to plan their trip in 2007 said the Internet influenced their decision to visit Laughlin (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*

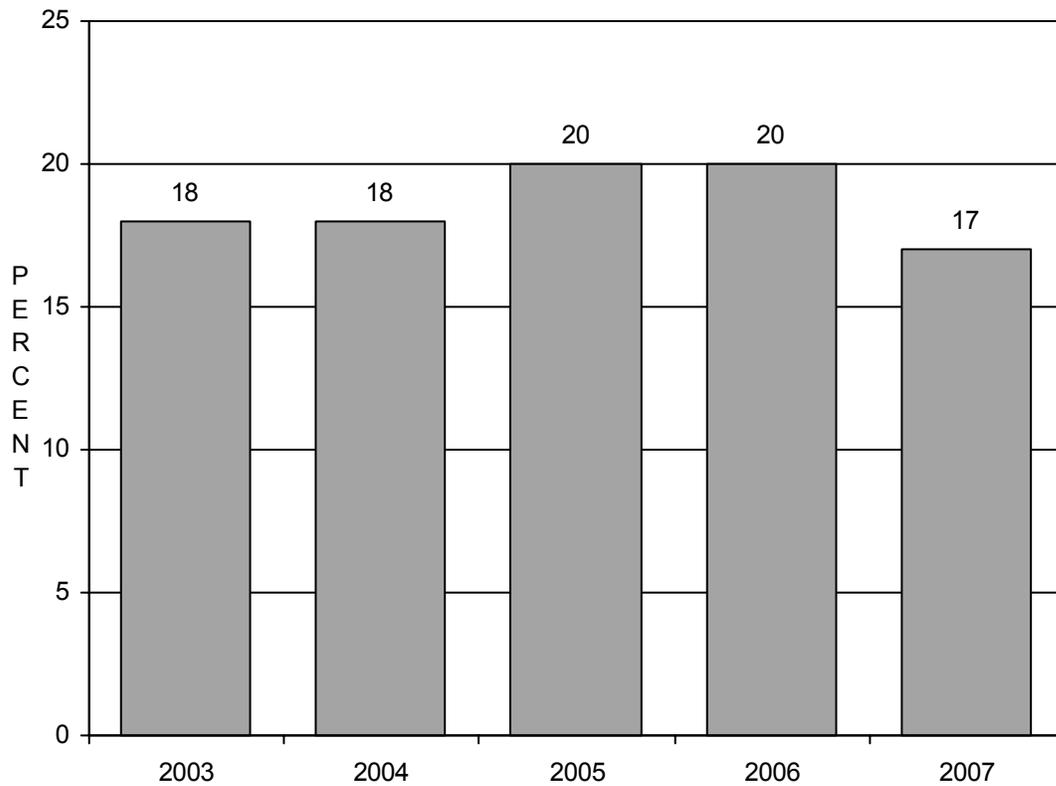


Three in four Laughlin visitors (75%) said they have visited Las Vegas some time in the past five years, down from 82% in 2003, and 81% in 2004 (Figure 26).

* 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*

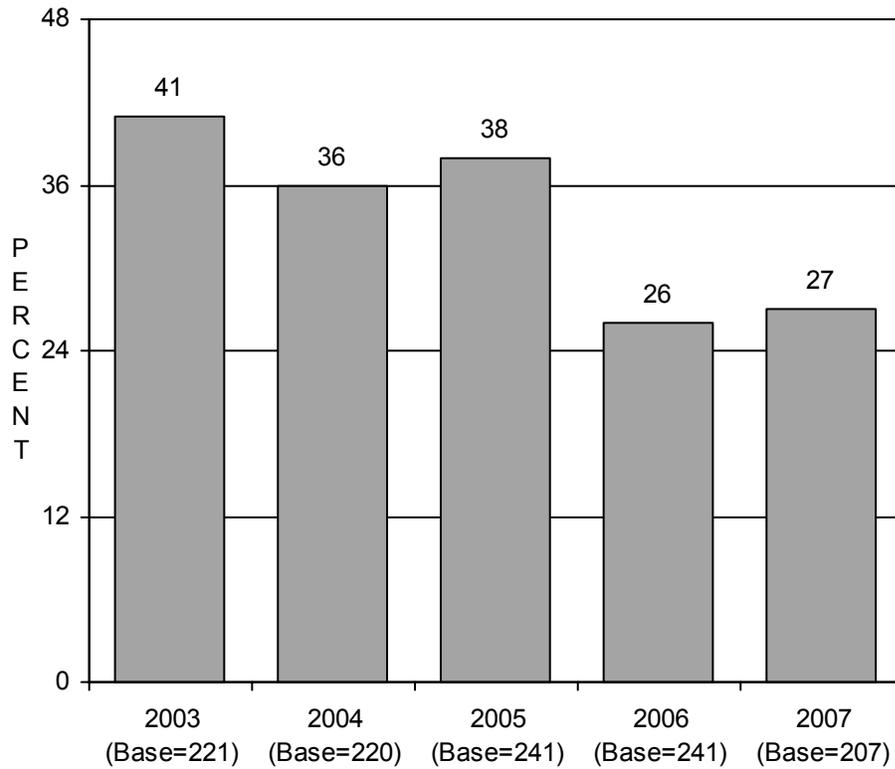


One in six Laughlin visitors (17%) said they had visited or were planning to visit Las Vegas on this trip (Figure 27).

* 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)

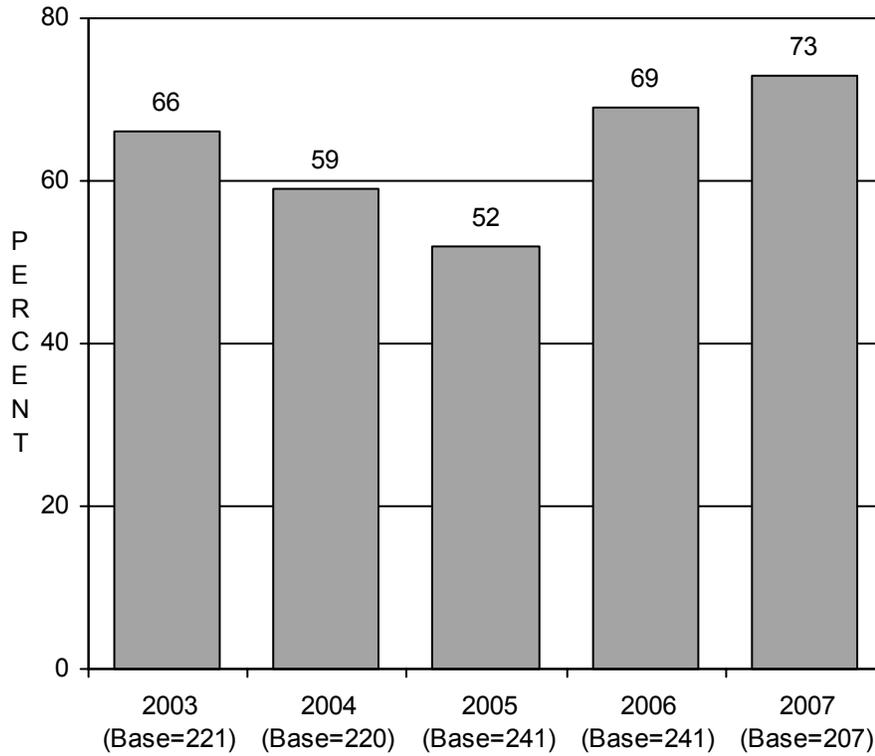


Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, 27% said they had visited or intended to visit Downtown, about the same as last year, but down from 41% in 2003, 36% in 2004, and 38% in 2005 (Figure 28).

* 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)

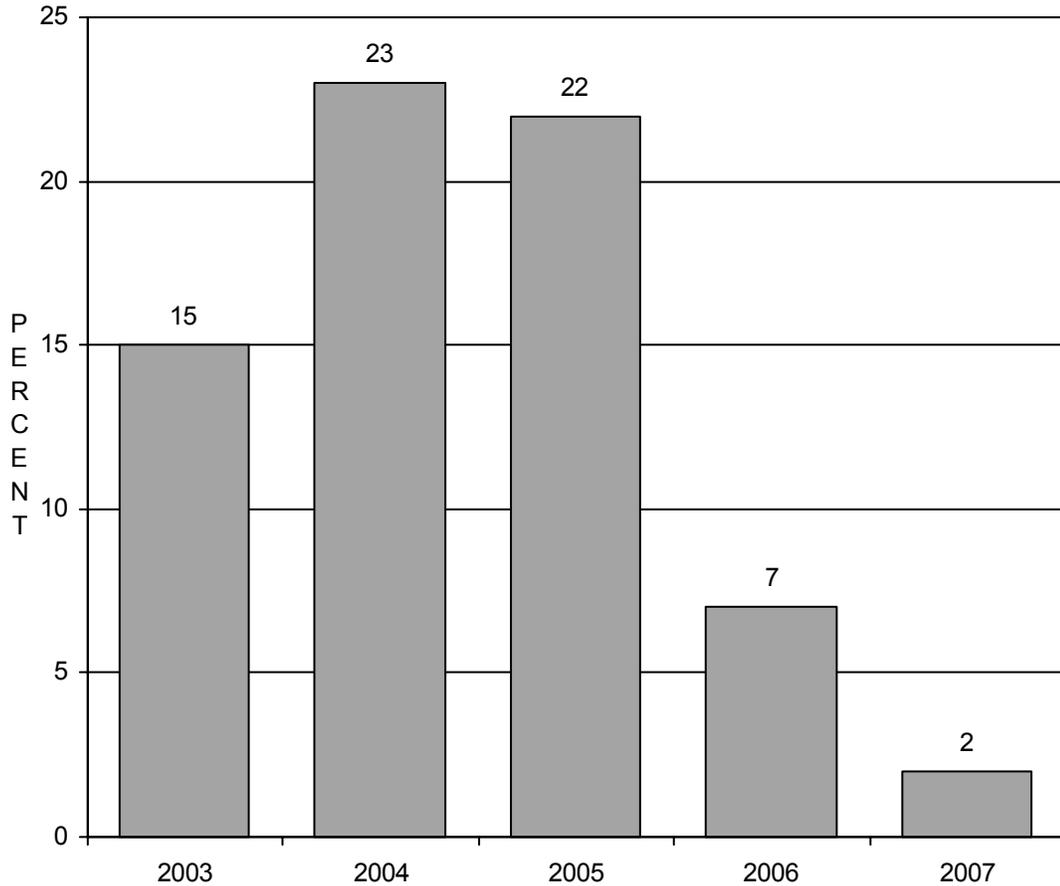


Among those who visited or planned to visit Las Vegas on this trip to Laughlin, 73% said they intended to visit the Strip, similar to last year, but up from 59% in 2004 and 52% in 2005 (Figure 29).

* 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)

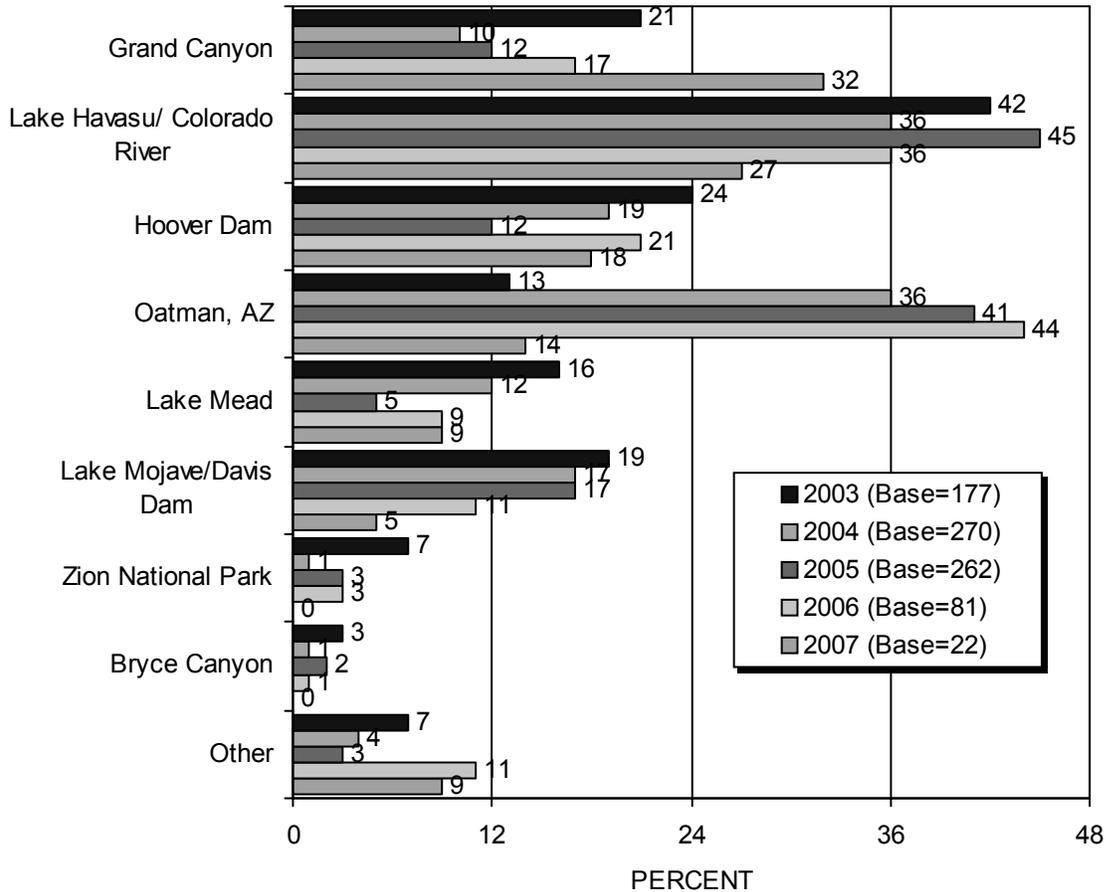


We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 30), and only 2% said yes in 2007, down significantly from all prior years.

* 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.

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 places (Figure 31) were most likely to have visited the Grand Canyon (32%), the Lake Havasu/Colorado River area (27%), Hoover Dam (18%), and the ghost town of Oatman (14%), followed by Lake Mead (9%), and the Lake Mojave/Davis Dam area (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.

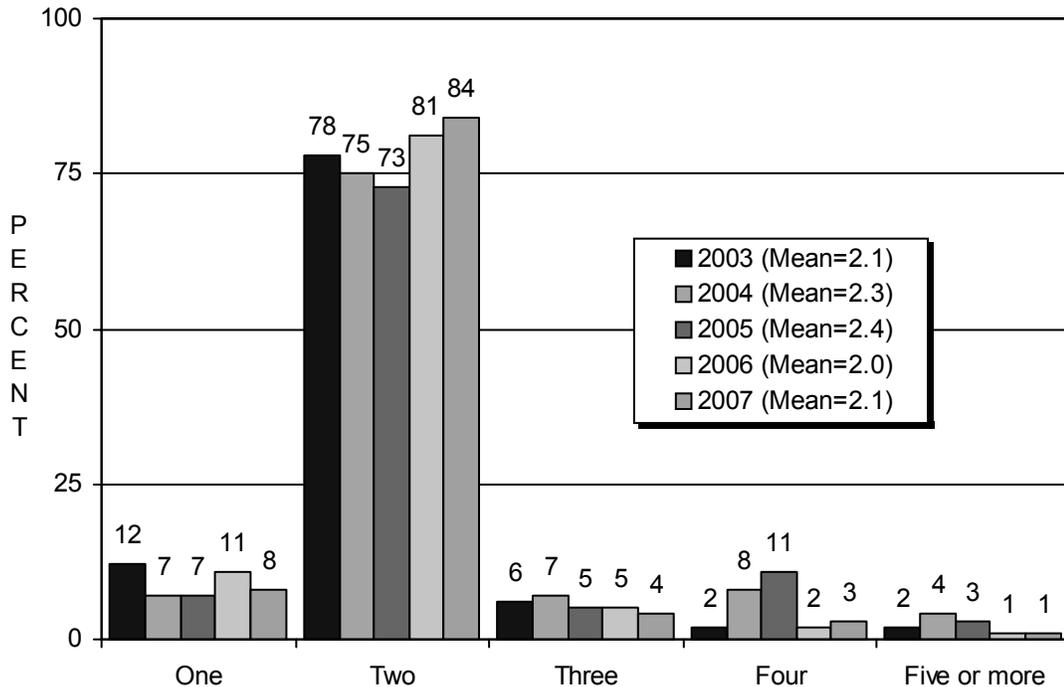
Multiple responses were permitted to this question.

The base size in 2007 is too small to allow reliable statistical comparisons with other years.

TRIP CHARACTERISTICS AND EXPENDITURES

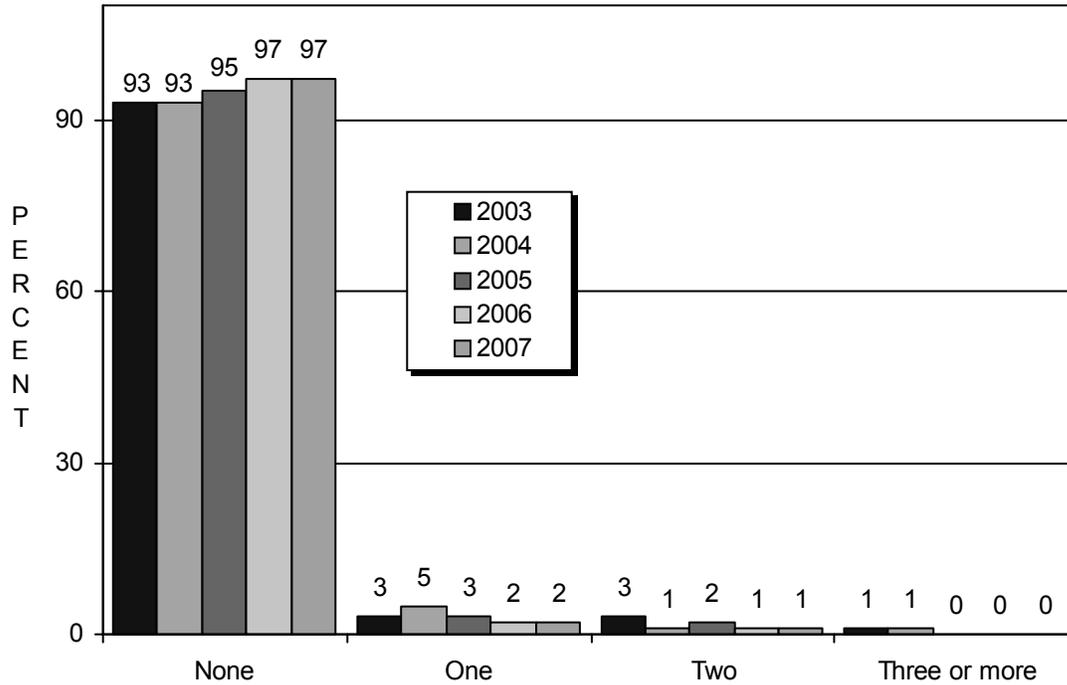
We asked visitors how many adults (21 years old or older) including themselves were in their immediate party (Figure 32). The majority (84%) reported two adults in their party, an increase from 75% in 2004 and 73% in 2005. Eight percent (8%) said they were traveling alone, a decrease from 12% in 2003 and 11% in 2006. Four percent (4%) 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 2.1 in 2007 (similar to last year's figure of 2.0).

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 visitors how many people under 21 years old were in their immediate party (Figure 33). In 2007, the majority (97%) of visitors reported no one under 21 in their party, up from 93% in both 2003 and 2004, and 95% in 2005. Only 3% said their party included someone under the age of 21, down from 7% in both 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*

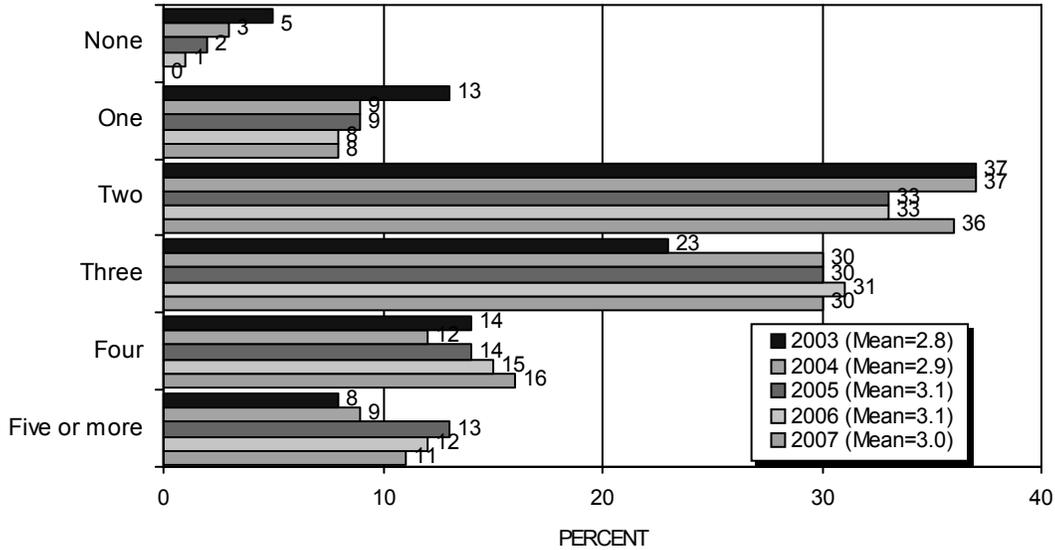
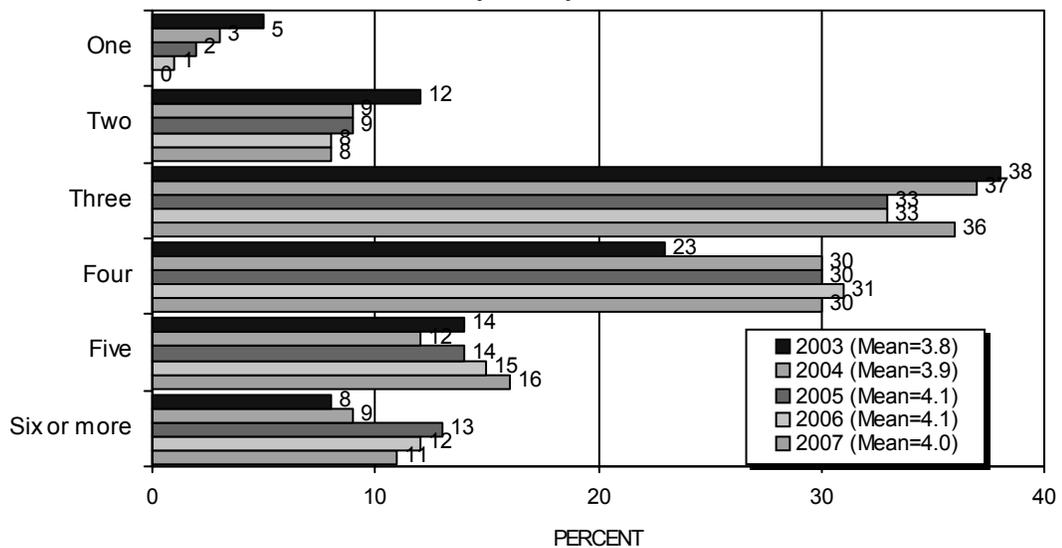


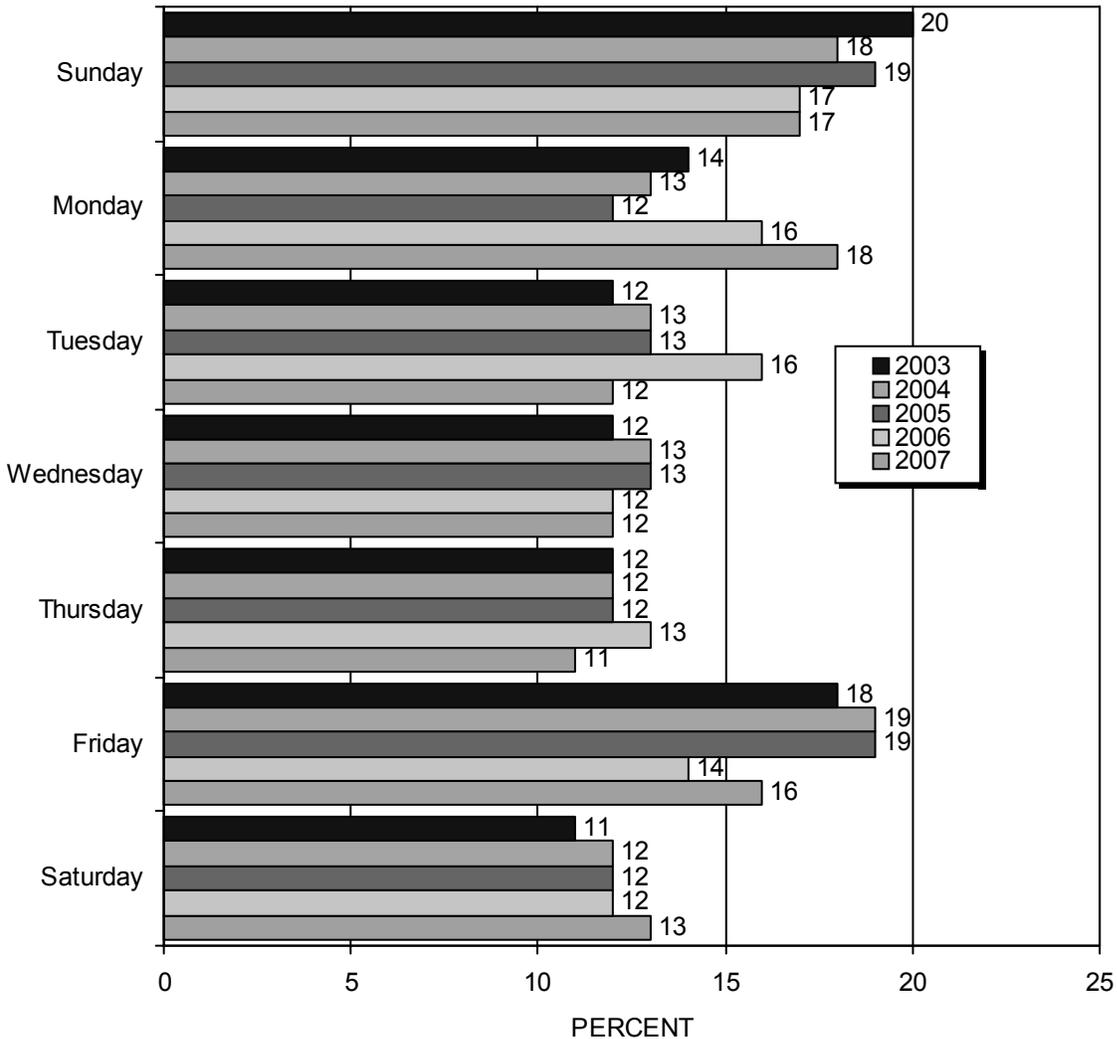
FIGURE 35
Days Stayed*



During 2007, Laughlin visitors stayed an average of 3.0 nights and 4.0 days, up from 2.8 nights and 3.8 days in 2003, but down from 3.1 nights and 4.1 days in both 2005 and 2006 (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.

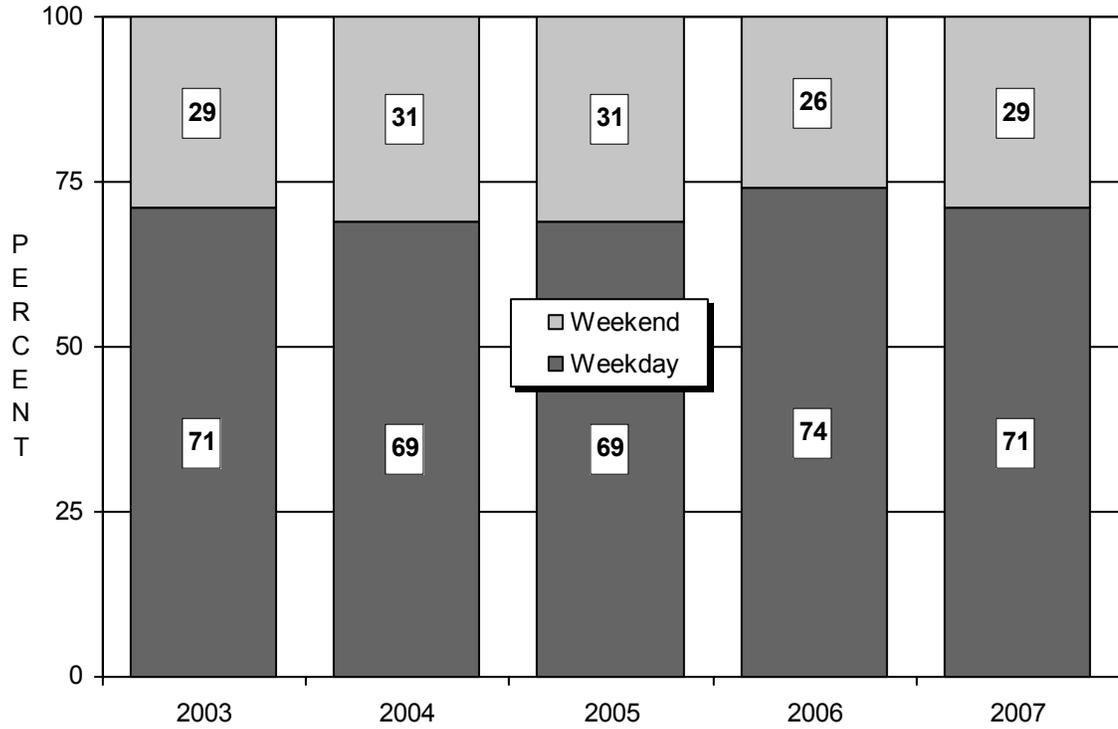
FIGURE 36
 Day Of Arrival*



Visitors were most likely to arrive in Laughlin on a Monday (18%, up from 14% in 2003, 13% in 2004 and 12% in 2005), a Sunday (17%), or a Friday (16%, similar to last year, but down from 19% in both 2004 and 2005) (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.

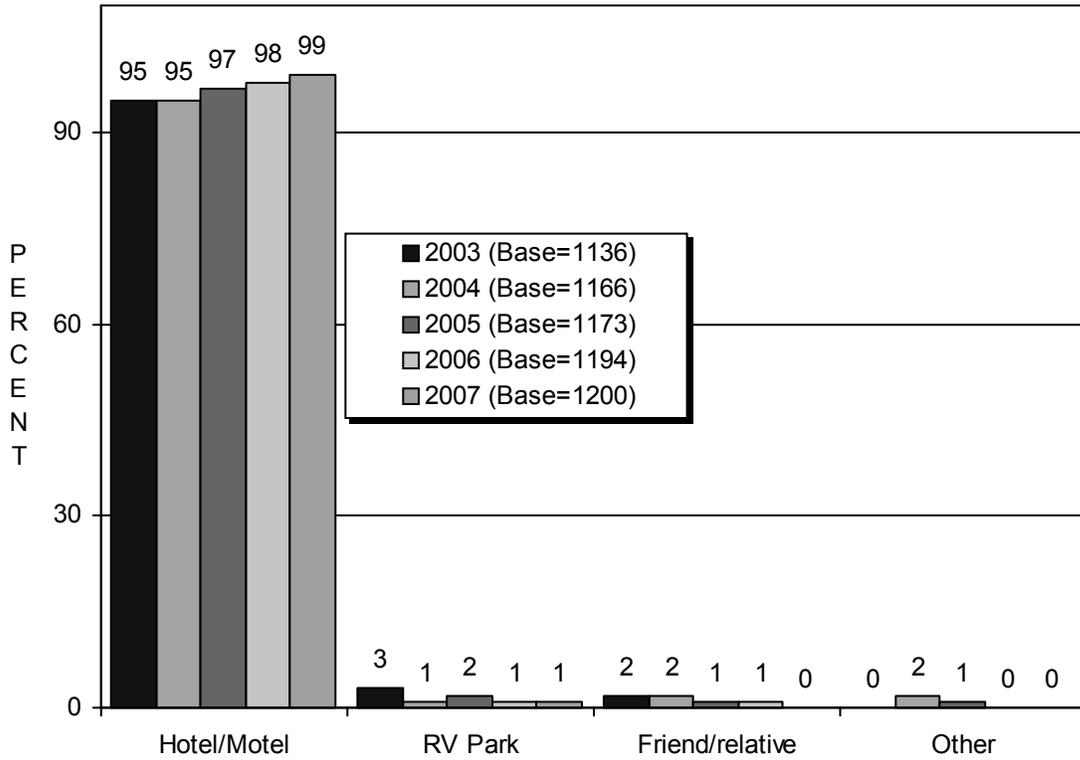
FIGURE 37
Weekend Versus Weekday Arrival*



The likelihood of arriving in Laughlin on a weekend (Friday or Saturday) was 29%, while 71% of visitors arrived between Sunday and Thursday (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.

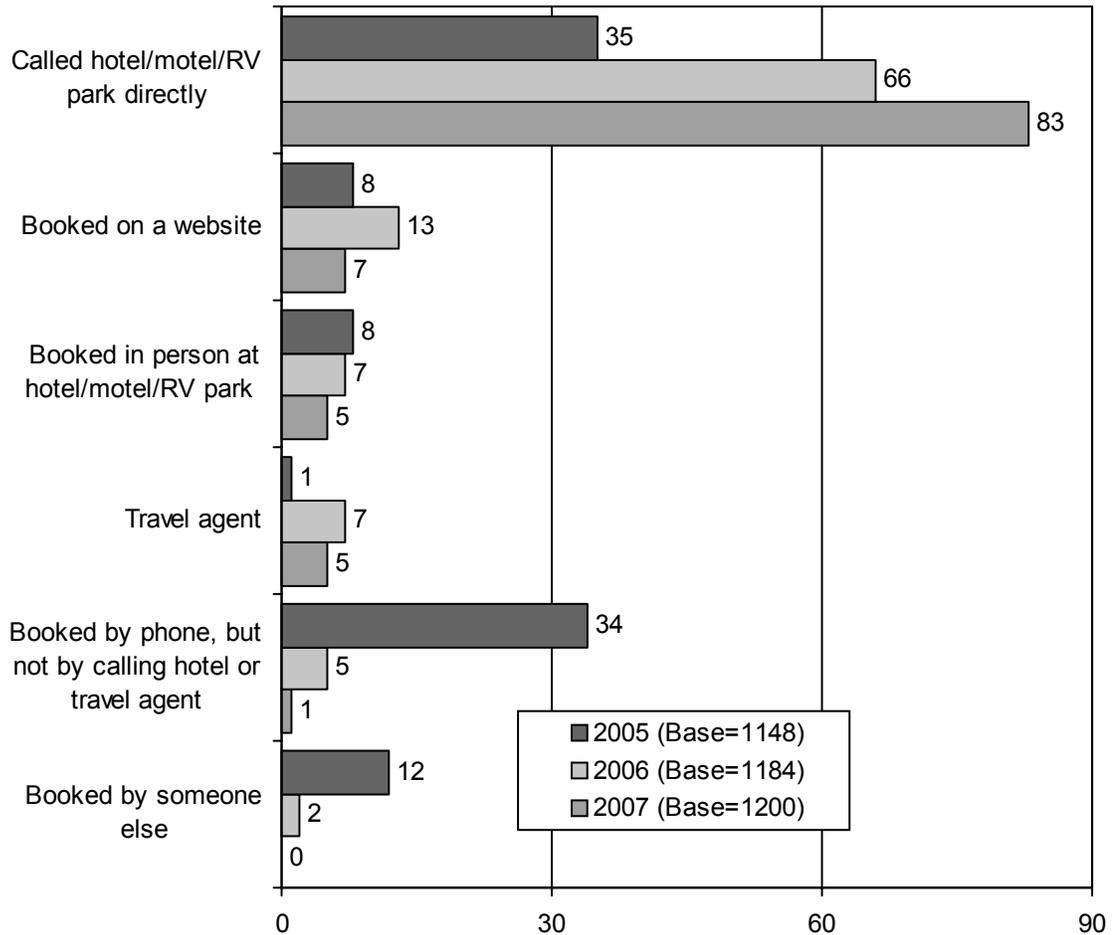
FIGURE 38
Type Of Lodging*
(Among Those Who Stayed Overnight)



As shown in Figure 38, the proportion of visitors staying in hotels among visitors who stayed overnight was 99%, up from all prior years.

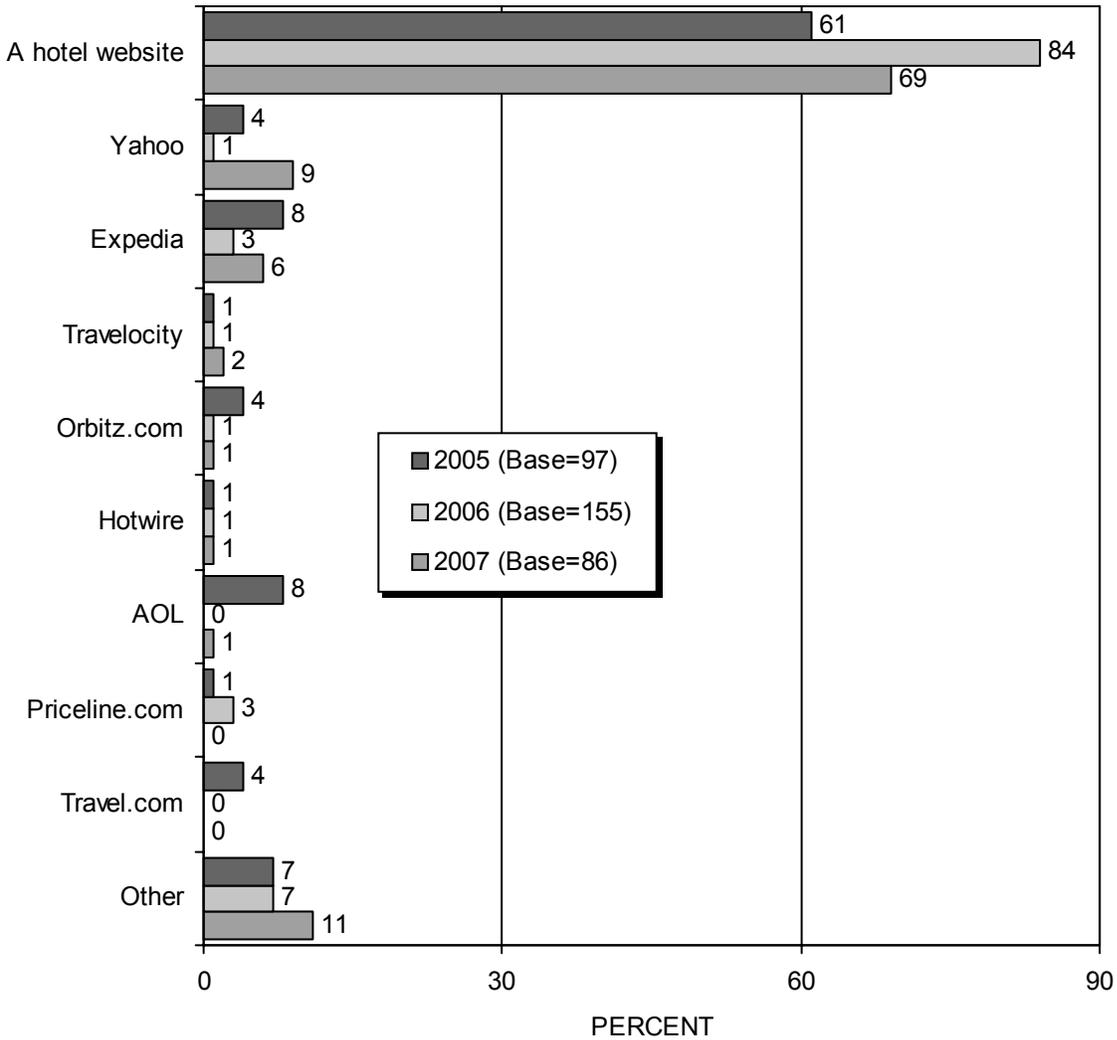
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

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



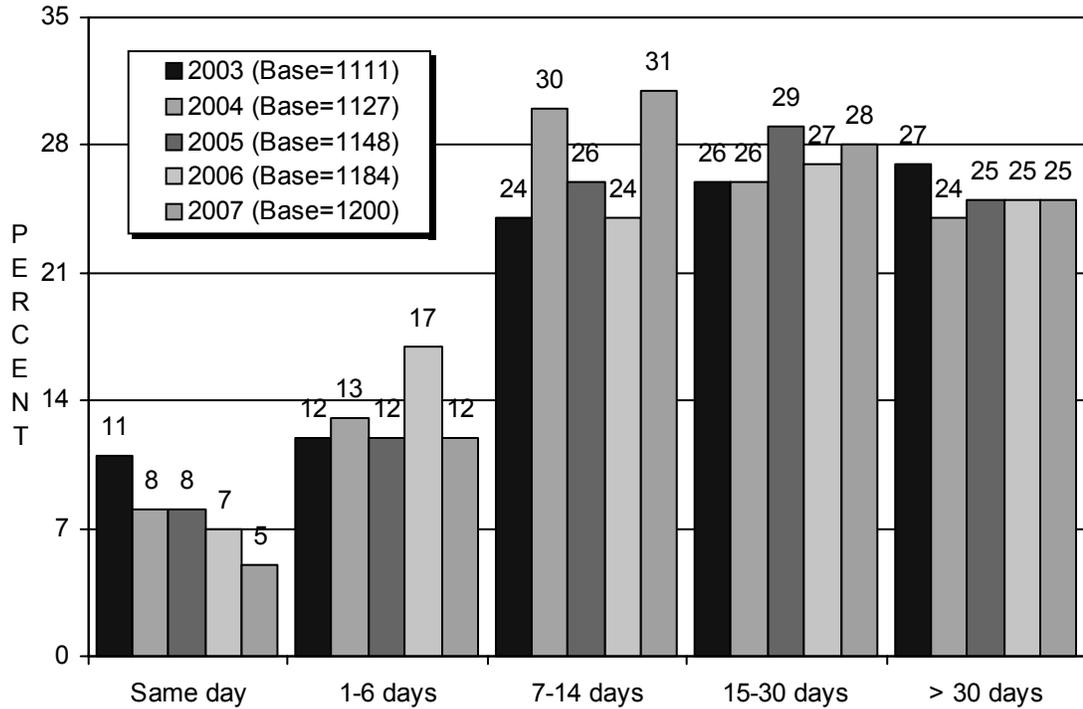
Beginning in 2005, visitors were asked how they booked their accommodations (Figure 39). This year more than eight in ten (83%) said they booked their accommodations by calling the property directly (an increase from 35% in 2005 and 66% last year), 7% booked on a website (down from 13% last year), 5% each said they booked through a travel agent (up from 1% in 2005, but down from 7% last year) or in person (down from 8% in 2005), and 1% said they booked by phone, but not by calling the hotel or a travel agent (a decrease from 34% in 2005, and 5% last year).

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 (Figure 40). More than two thirds (69%) said they used a hotel website to book their accommodations, a decrease from 84% last year. Nine percent (9%) booked their accommodations through Yahoo (an increase from 1% last year), 6% used Expedia, 2% used Travelocity, while other websites accounted for 1% or less each.

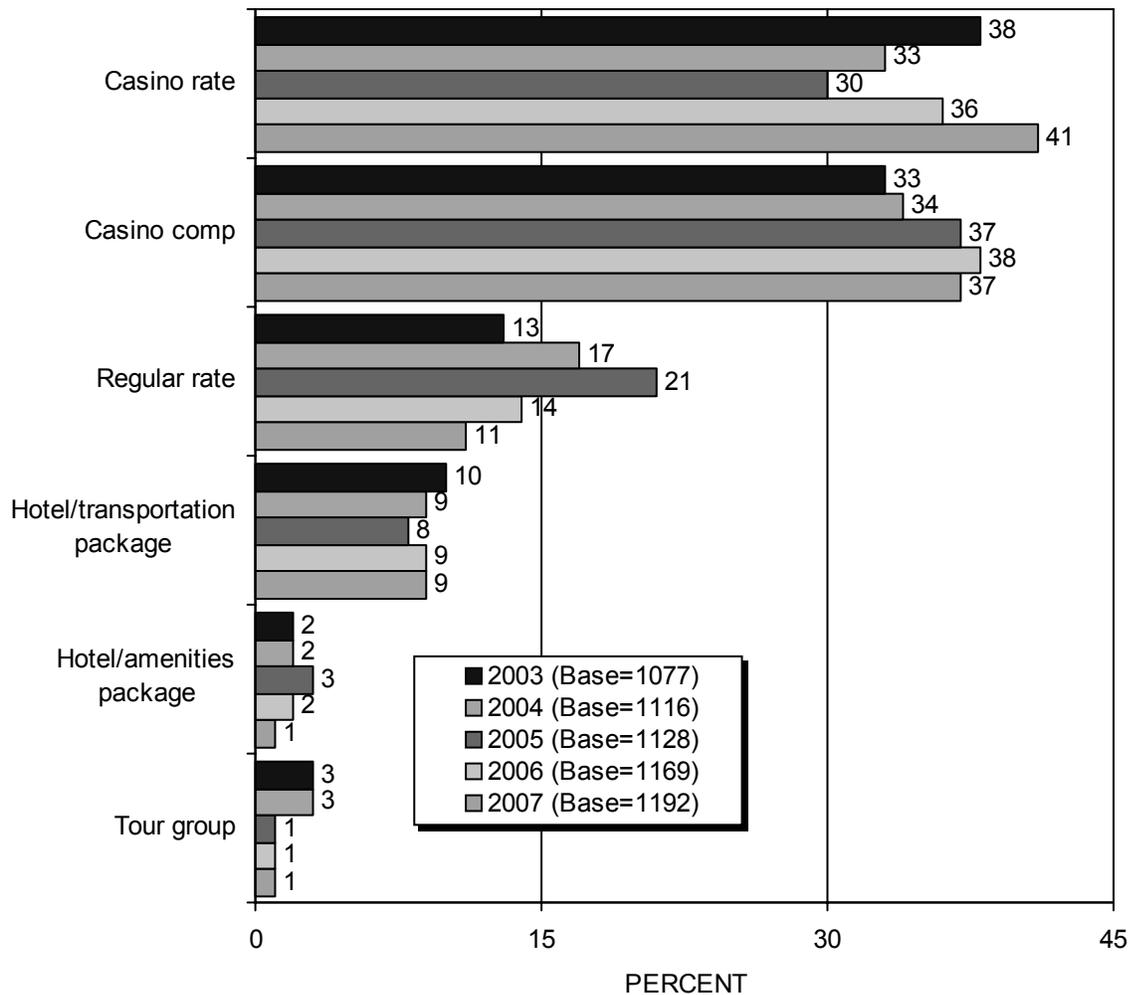
FIGURE 41
How Far In Advance Accommodations Were Booked*
 (Among Those Staying In A Hotel/Motel/RV Park)



We asked those staying in a hotel, motel, or RV park how far in advance they had booked accommodations (Figure 41). Five percent (5%) of visitors booked accommodations the same day (down from 11% in 2003, 8% in both 2004 and 2005, and 7% last year), 12% booked one to six days in advance (down from 17% last year), 59% booked 7 to 30 days in advance (up from 50% in 2003 and 51% in 2006), 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). More than three in four (78%) reported receiving some type of casino rate, either a casino complimentary rate (37%), or a casino rate (41%, an increase from 33% in 2004, 30% in 2005, and 36% last year). At the same time, the number of visitors who said they received a regular room rate (11%) was down significantly from 17% in 2004, 21% in 2005, and 14% last year. Eleven percent (11%) 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
 Room Rate by Booking Method
 (2007)

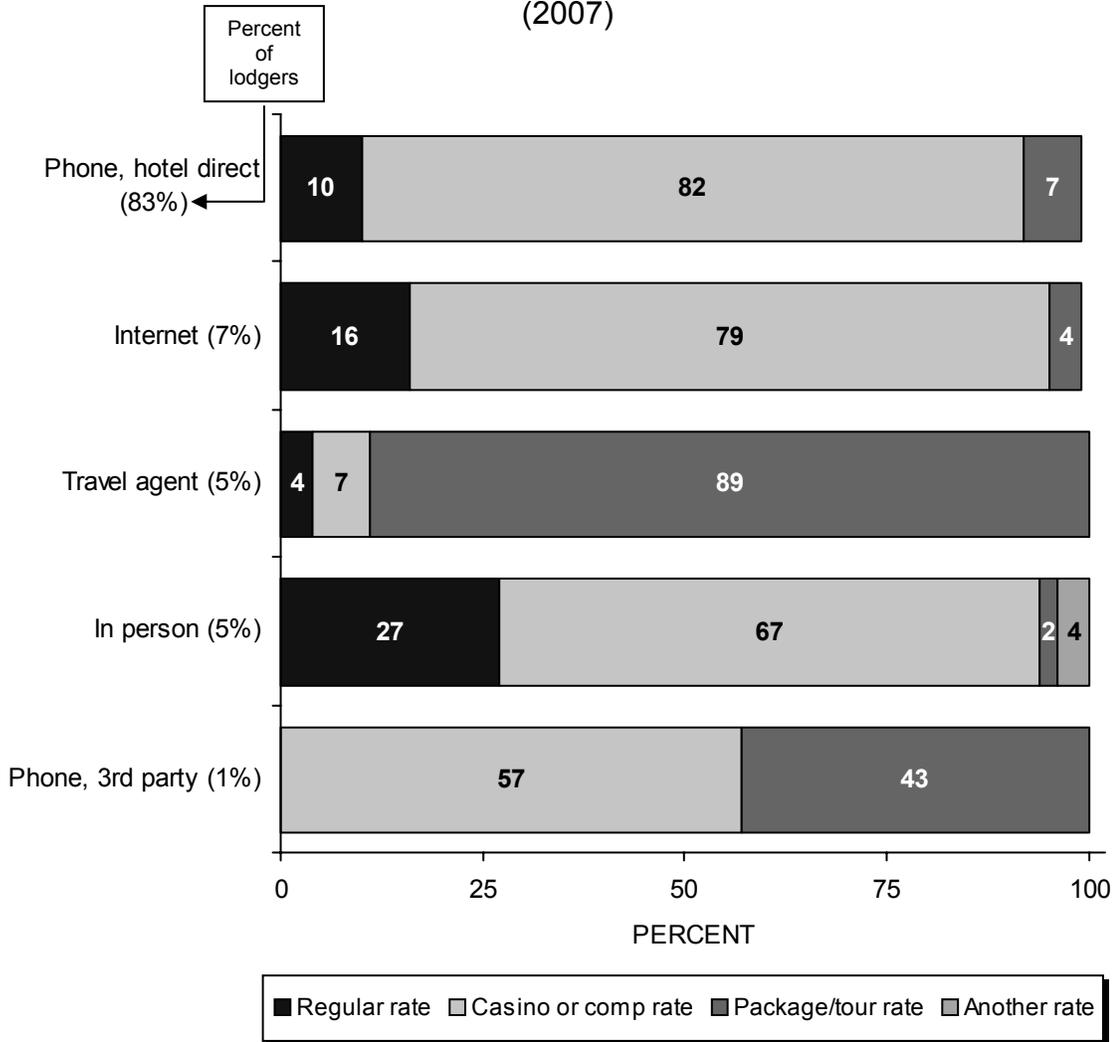
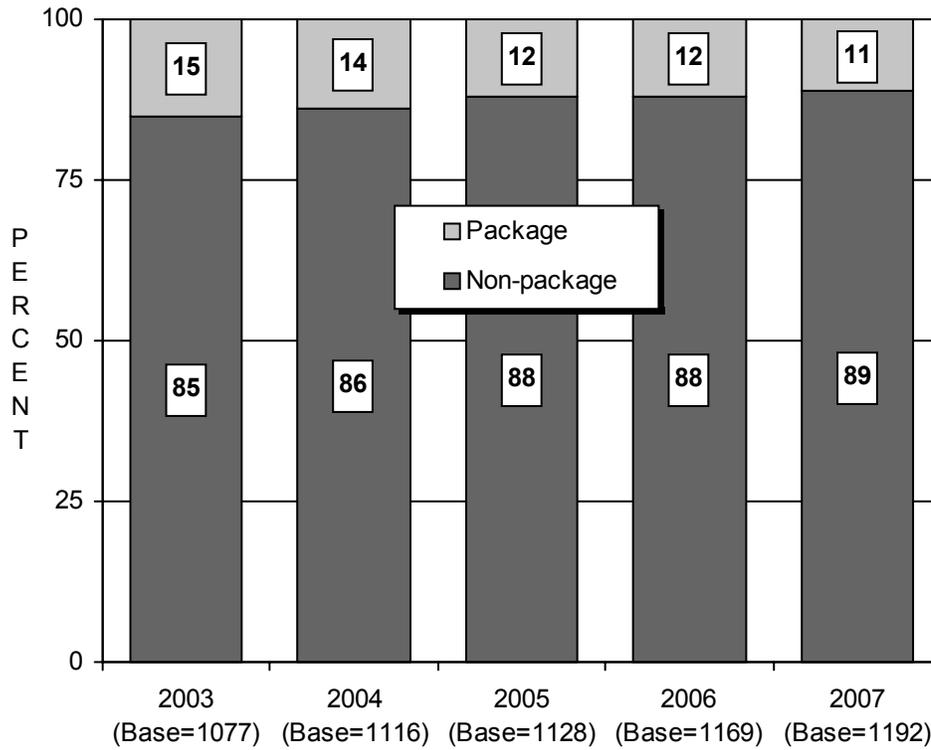


Figure 43 shows the room rate category by the booking method for 2007. Those who called the hotel directly (82%), or booked on the Internet (79%), in person (67%), or by phone through a third party (57%) were more likely than those who booked through a travel agent (7%) to say they got a casino or casino complimentary rate. Those who booked through a travel agent (89%) or on the phone through a third party (43%) were far more likely than others to say they got a package/tour rate. A regular room rate was most common among those who booked in person (27%), followed by those who booked on the Internet (16%), and those who phoned the hotel directly (10%).

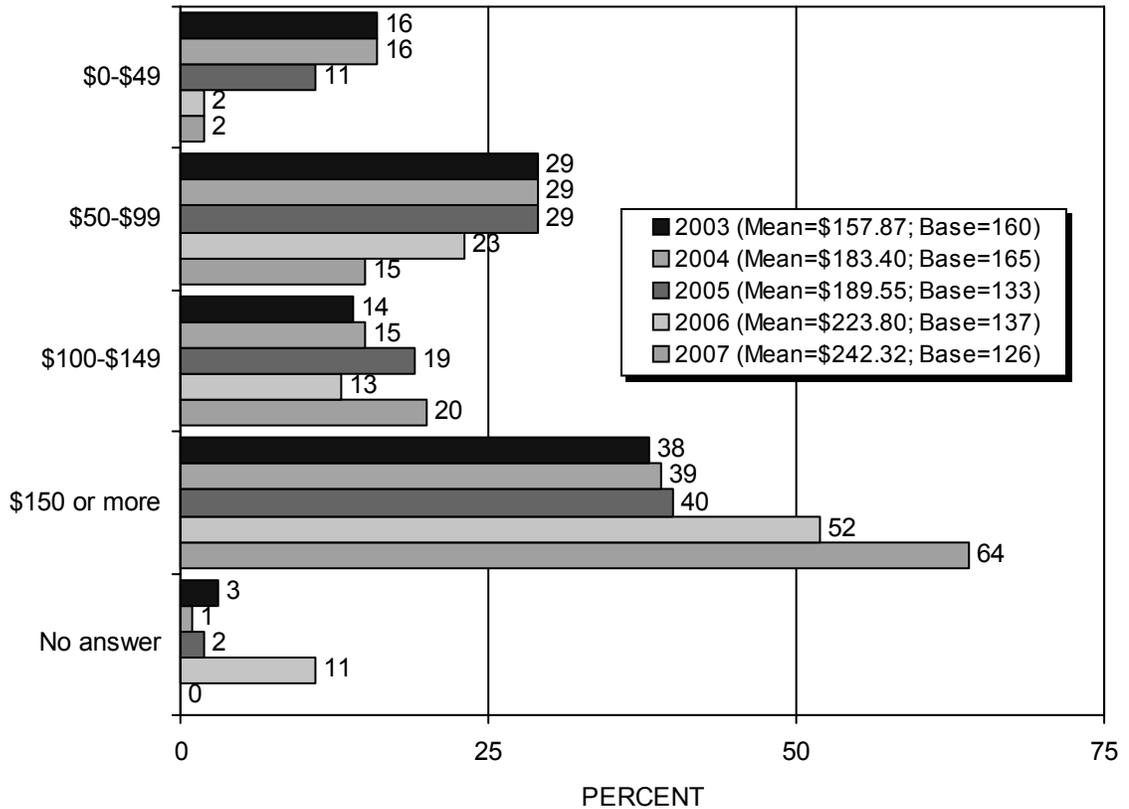
FIGURE 44
Package vs. Non-Package Rates*
(Among Those Staying In A Hotel Or Motel)



In 2007, 11% received their lodging as part of a package deal, down from 15% in 2003 and 14% in 2004 (Figure 44).

* 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.

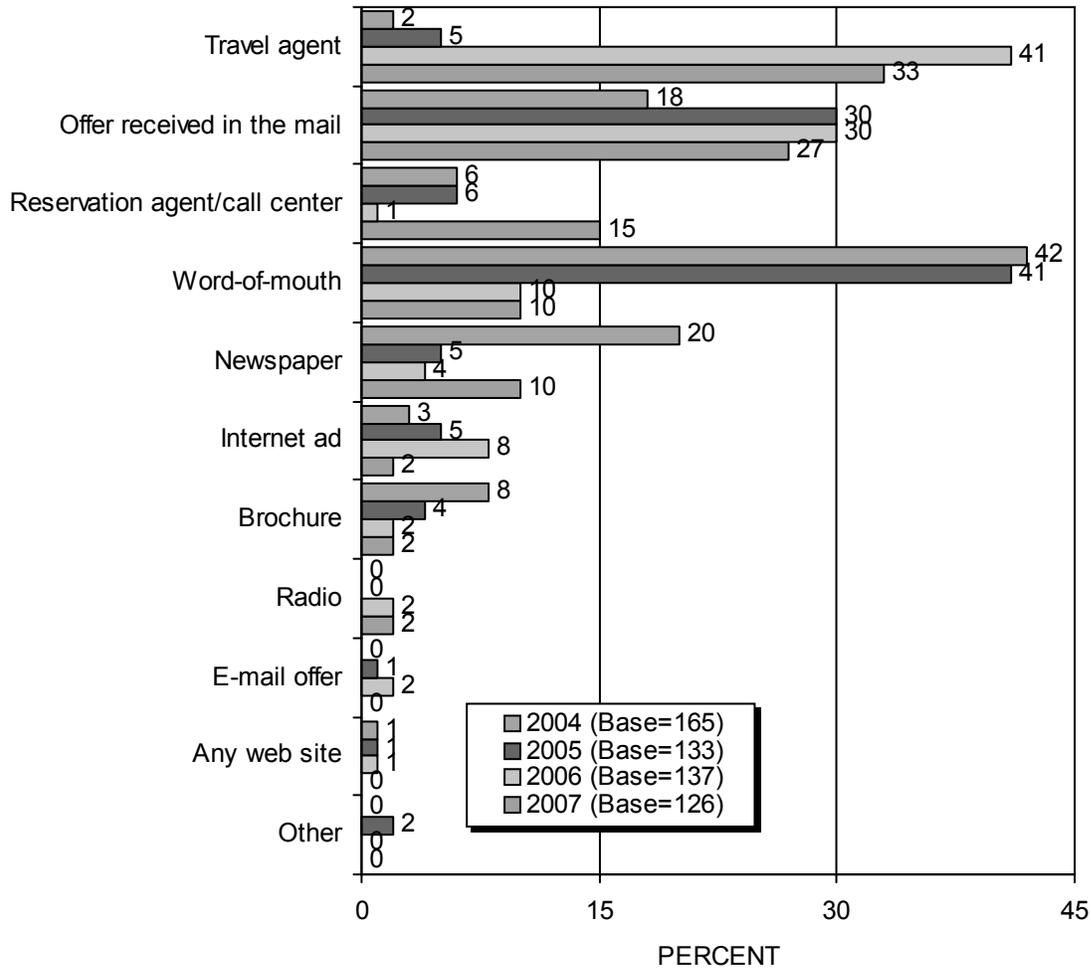
FIGURE 45
Cost Of Package — Per Person*
(Among Those Who Bought A Package)



We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 45). Sixty-four percent (64%) said they paid \$150 or more for their package (an increase from 38% in 2003, 39% in 2004, and 40% in 2005), 20% paid \$100 to \$149, 15% paid \$50 to \$99, and 2% paid less than \$50. The average package cost was \$242.32, similar to last year (\$223.80), but up considerably over \$157.87 in 2003, \$183.40 in 2004, and \$189.55 in 2005.

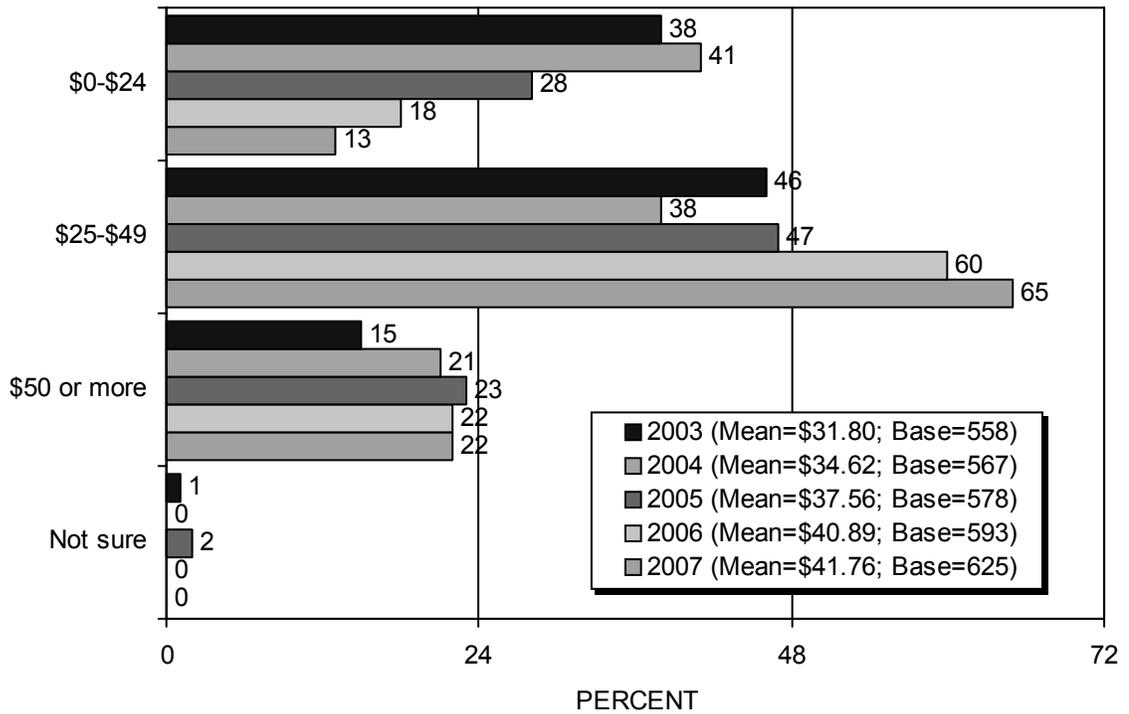
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 46
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 46). One third (33%, up from 5% in 2005 and 2% in 2004) said they first heard about the package through a travel agent. Twenty-seven percent (27%) said they received an offer through the mail, and 15% said they found out about the package through a call center, up from 6% each in 2004 and 2005, and 1% last year. Ten percent (10%) heard about the offer through word-of-mouth (down from 42% in 2004 and 41% in 2005), and 10% found it in a newspaper (up from 4% last year). Two percent each (2%) heard about the package through an Internet ad (down from 8% in 2006), a brochure (down from 8% in 2004), or from the radio.

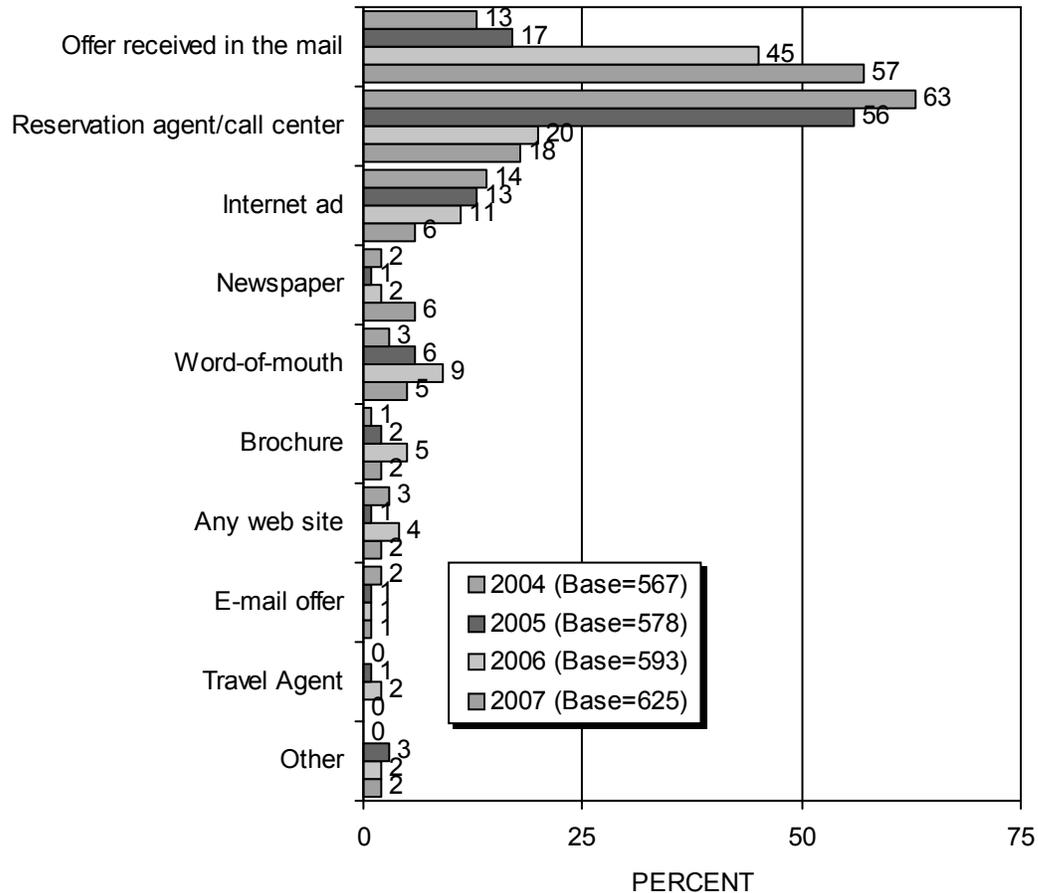
FIGURE 47
Lodging Expenditures — Average Per Night*
(Among Those Staying In A Hotel Or Motel/Non-Package)



The average reported room cost among non-package hotel and motel lodgers in 2007 was \$41.76, similar to last year, but up significantly from \$31.80 in 2003, \$34.62 in 2004, and \$37.56 in 2005 (Figure 47).

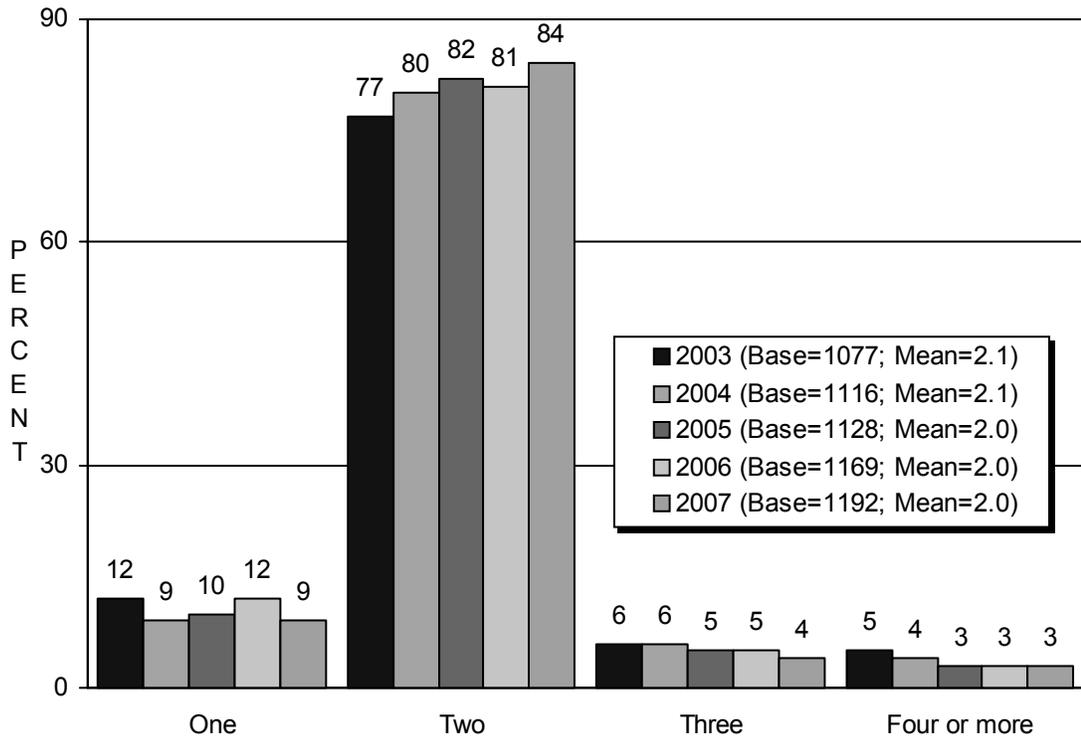
* NOTE: With data now reported on a CALENDAR year basis, the 2003 figures in this report may differ from FISCAL year 2003 results reported in previous visitor profile studies.

FIGURE 48
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 48). More than one-half (57%) said they received an offer in the mail, an increase from 13% in 2004, 17% in 2005, and 45% last year. Eighteen percent (18%) 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. Six percent (6%) saw an advertisement on the Internet (down from all prior years), and another 6% said they heard about the rate from a newspaper (up from all prior years). Five percent (5%) said they said they heard about it through word of mouth, 2% each heard about the rate from a brochure or from a website, and 1% from an email offer.

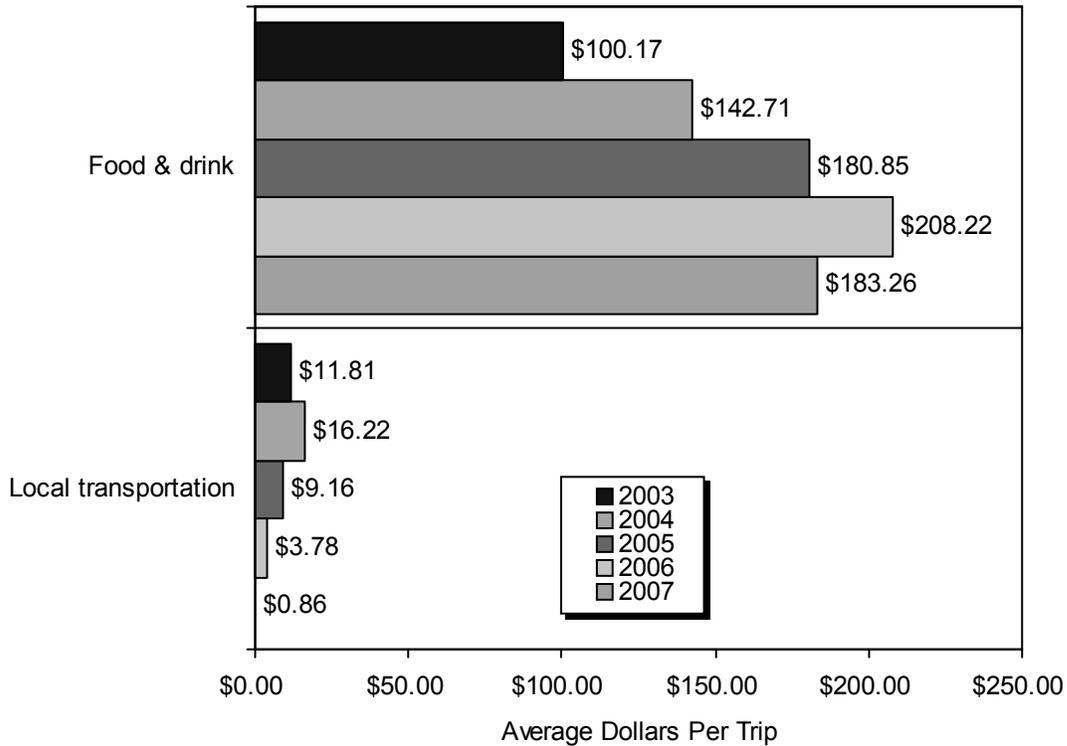
FIGURE 49
 Number Of Room Occupants*
 (Among Those Staying In A Hotel Or Motel)



As Figure 49 shows, the majority of visitors (84% in 2007) 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 50
Average Trip Expenditures On Food & Drink — And Local Transportation*
(Including Visitors Who Spent Nothing In That Category)



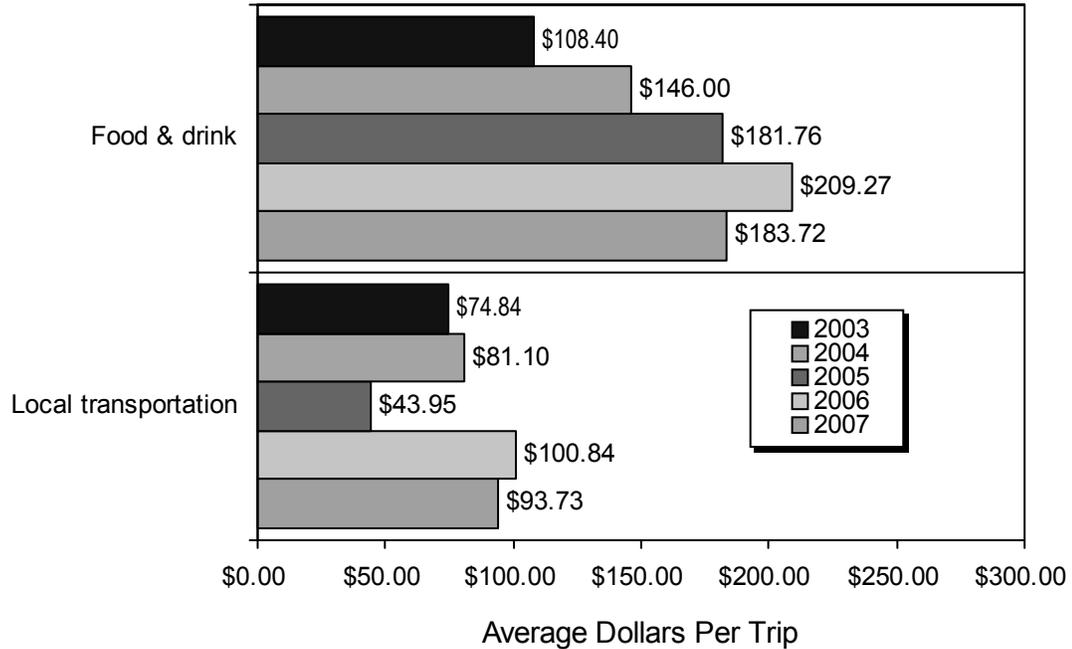
We asked all visitors about their daily expenditures on food and drink and on local transportation.

Figure 50 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In the current study, the average food and drink expenditures were \$183.26 per trip, down from \$208.22 last year, but up significantly from \$142.71 in 2004, and \$100.17 in 2003. The average local transportation expenditures were \$0.86 per trip, down from all 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.

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

FIGURE 51
Average Trip Expenditures On Food & Drink — And Local Transportation*
(Among Those Who Spent Money In That Category)



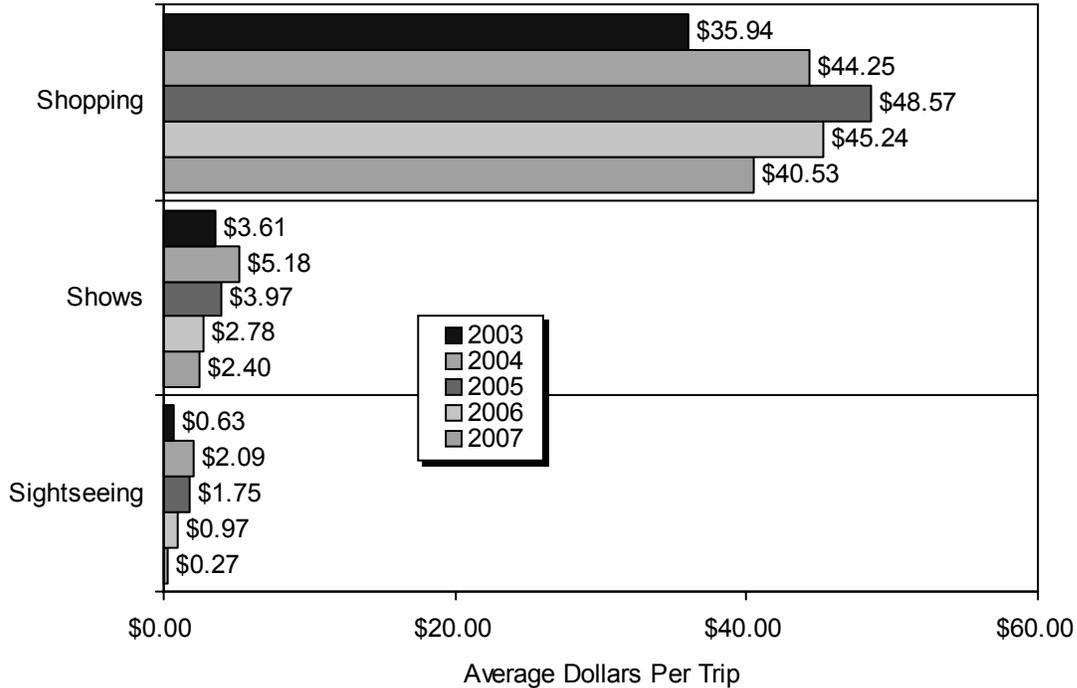
Among visitors who indicated they spent money in these categories, average food and drink expenditures in the current study were \$183.72 per trip, down significantly from \$209.27 last year, but up significantly from \$146.00 in 2004, and \$108.40 in 2003 (Figure 51). Average local transportation expenditures were \$93.73 per trip, up substantially from 2003 to 2005.

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

	2003	2004	2005	2006	2007
<u>Food and drink</u>					
Base size	(1108)	(1173)	(1194)	(1194)	(1197)
Proportion of total	92%	98%	99.5%	99.5%	99.8%
<u>Local transportation</u>					
Base size	(190)	(240)	(250)	(45)	(13)
Proportion of total	16%	20%	21%	4%	1%

* 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.

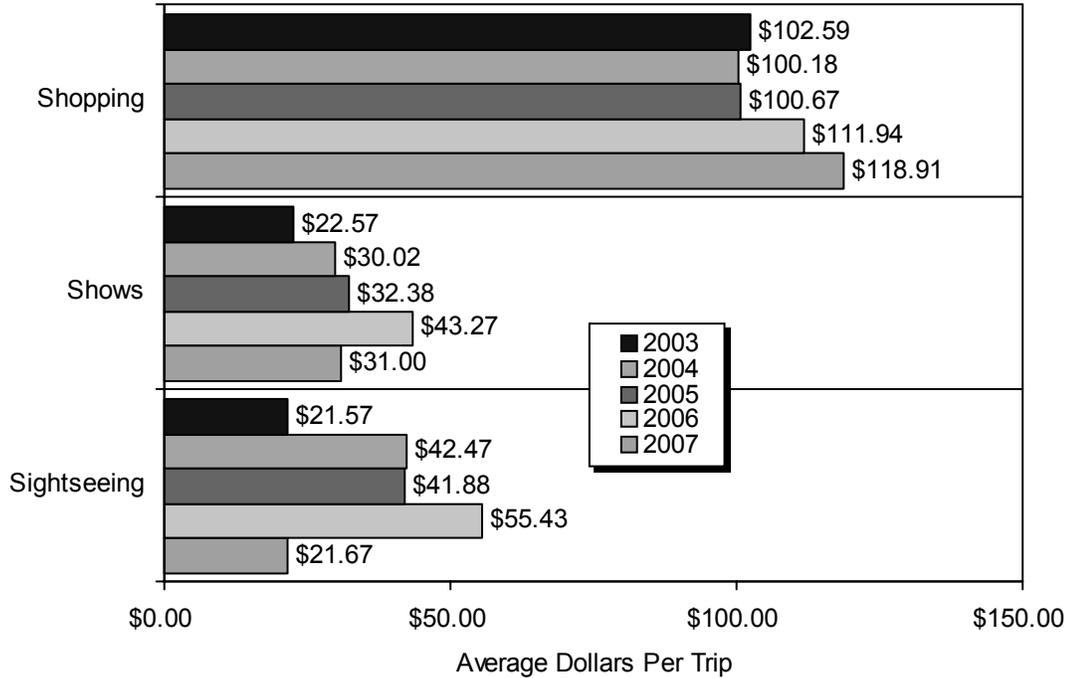
FIGURE 52
 Average Trip Expenditures On Shopping, Shows, And Sightseeing*
 (Including Visitors Who Spent Nothing In That Category)



We asked all visitors about the amount of money they spent on shopping, shows, and sightseeing during their visit to Laughlin. Figure 52 shows these average expenditures *including visitors who said they spent nothing in each category*. The average total spent on shopping in 2007 was \$40.53. An average of \$2.40 was spent on shows (down from \$3.61 in 2003, \$5.18 in 2004 and \$3.97 in 2005), and an average of \$0.27 was spent on sightseeing (a decrease from all 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 53
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 2007 was \$118.91, up from \$100.18 in 2004 (Figure 53). The average spent on shows was \$31.00, up from \$22.57 in 2003 but down from \$43.21 last year. The average spent on sightseeing was \$21.67, down from \$42.47 in 2004 and \$55.43 in 2006.

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

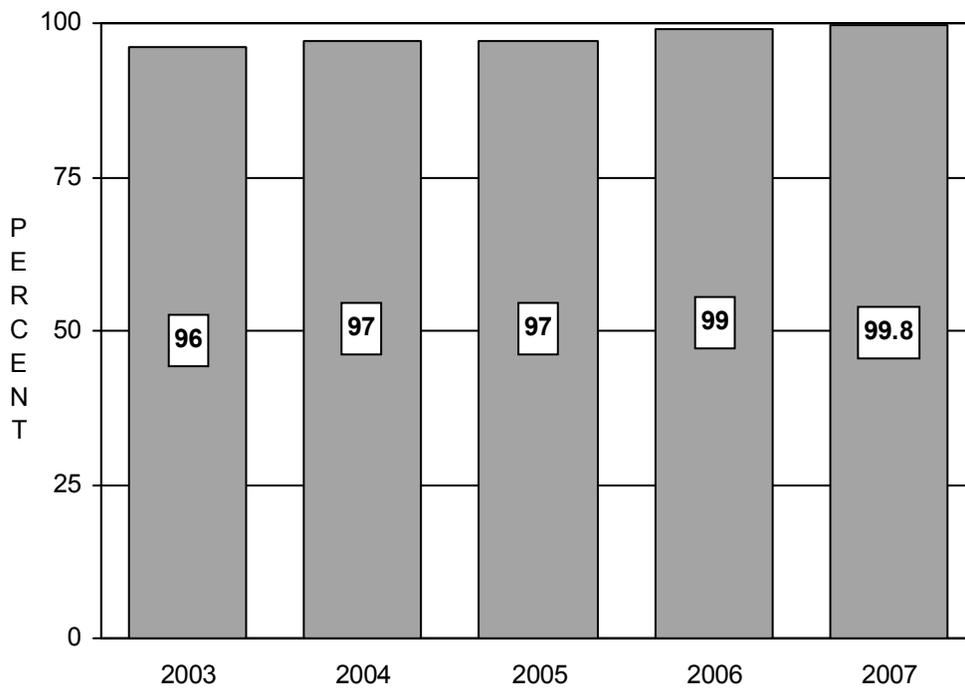
	2003	2004	2005	2006	2007
Shopping					
Base size	(420)	(530)	(579)	(485)	(409)
Proportion of total	35%	44%	40%	40%	34%
Shows					
Base size	(192)	(207)	(147)	(77)	(93)
Proportion of total	16%	17%	12%	6%	8%
Sightseeing					
Base size	(35)	(59)	(50)	(21)	(15)
Proportion of total	3%	5%	4%	2%	1%

* 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

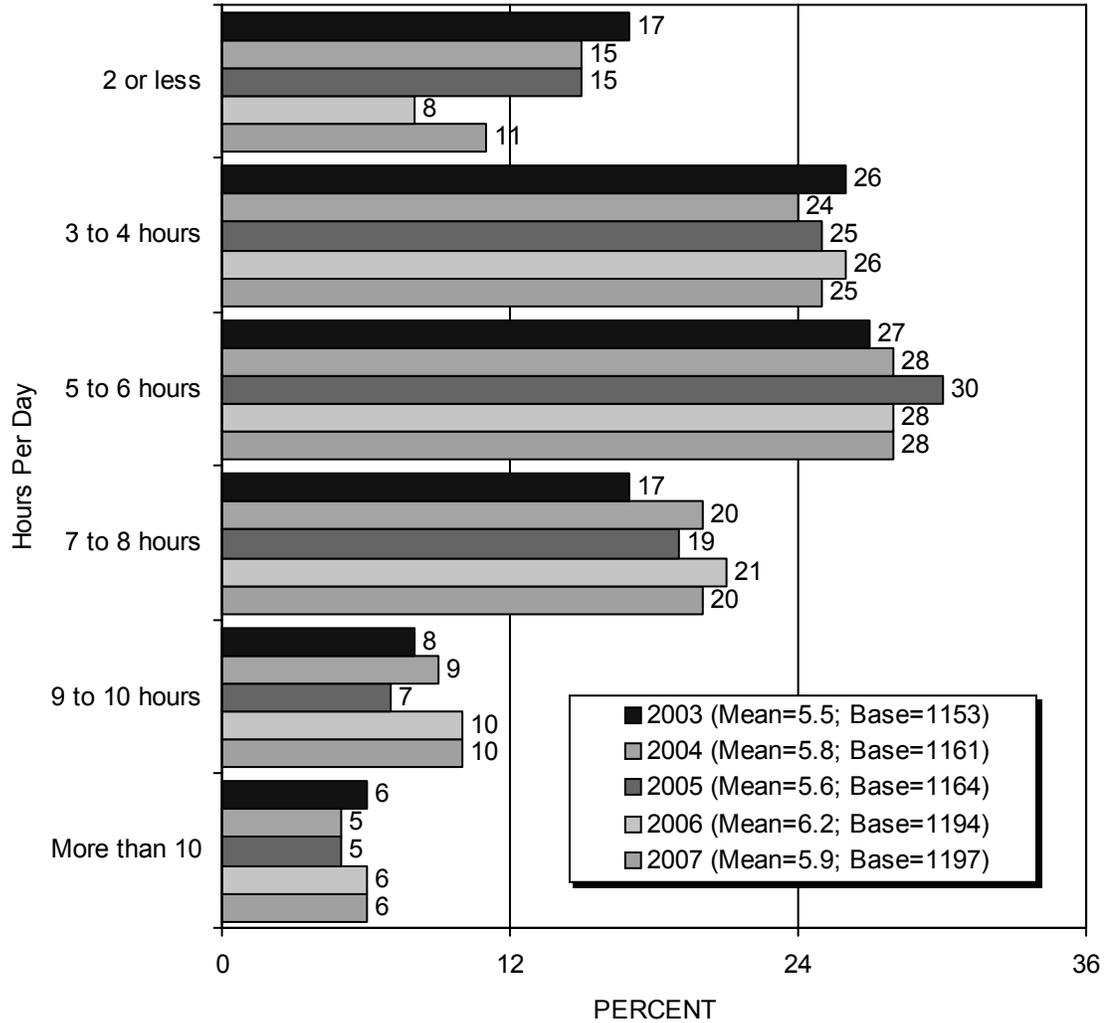
The number of Laughlin visitors in the current study who said they gambled on their trip to Laughlin was 99.8%, an increase from 96% in 2003 and 97% in both 2004 and 2005 (Figure 54).

FIGURE 54
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.

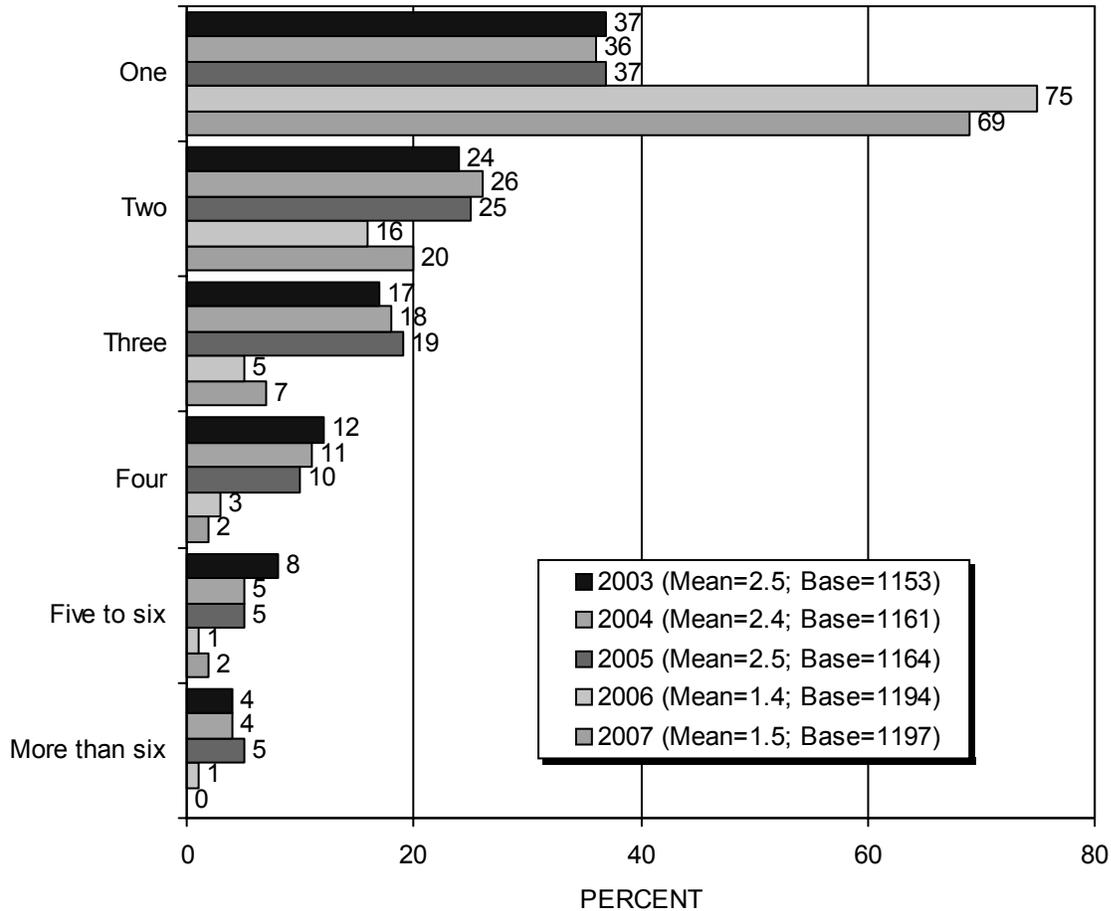
FIGURE 55
Hours Of Gambling — Average Per Day*
(Among Those Who Gambled)



In 2007, Laughlin visitors said they spent an average of 5.9 hours a day gambling, an increase from 5.5 hours in 2003, and 5.6 hours in 2005 (Figure 55).

* 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.

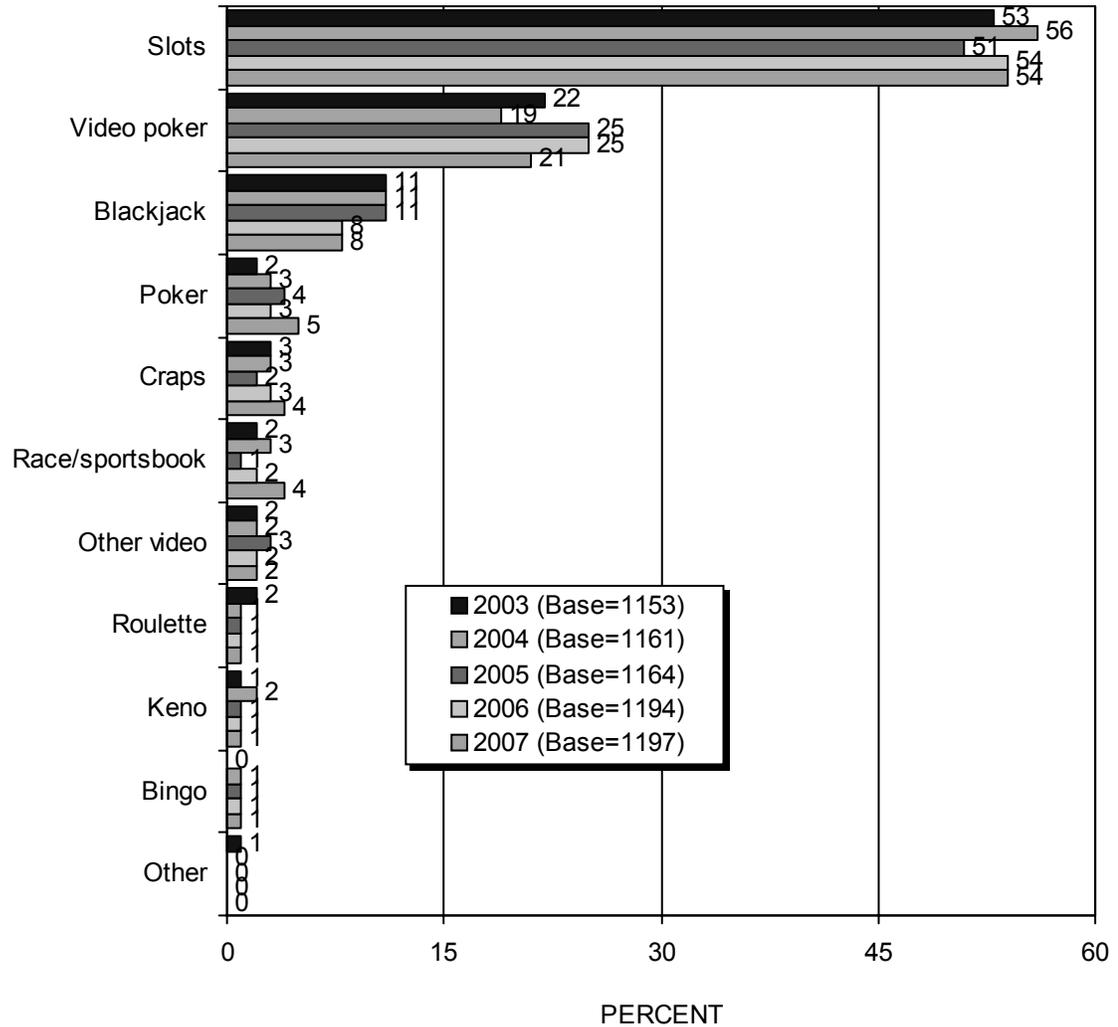
FIGURE 56
Number Of Different Casinos Visited*
(Among Those Who Gambled)



Gamblers reported visiting an average of 1.5 casinos in 2007, similar to last year, but a significant decrease from 2.5 casinos in both 2003 and 2005, and 2.4 casinos in 2004 (Figure 56). Sixty-nine percent (69%) of visitors reported visiting only one casino.

* 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 57
Casino Game Played Most Often*
(Among Those Who Gambled)

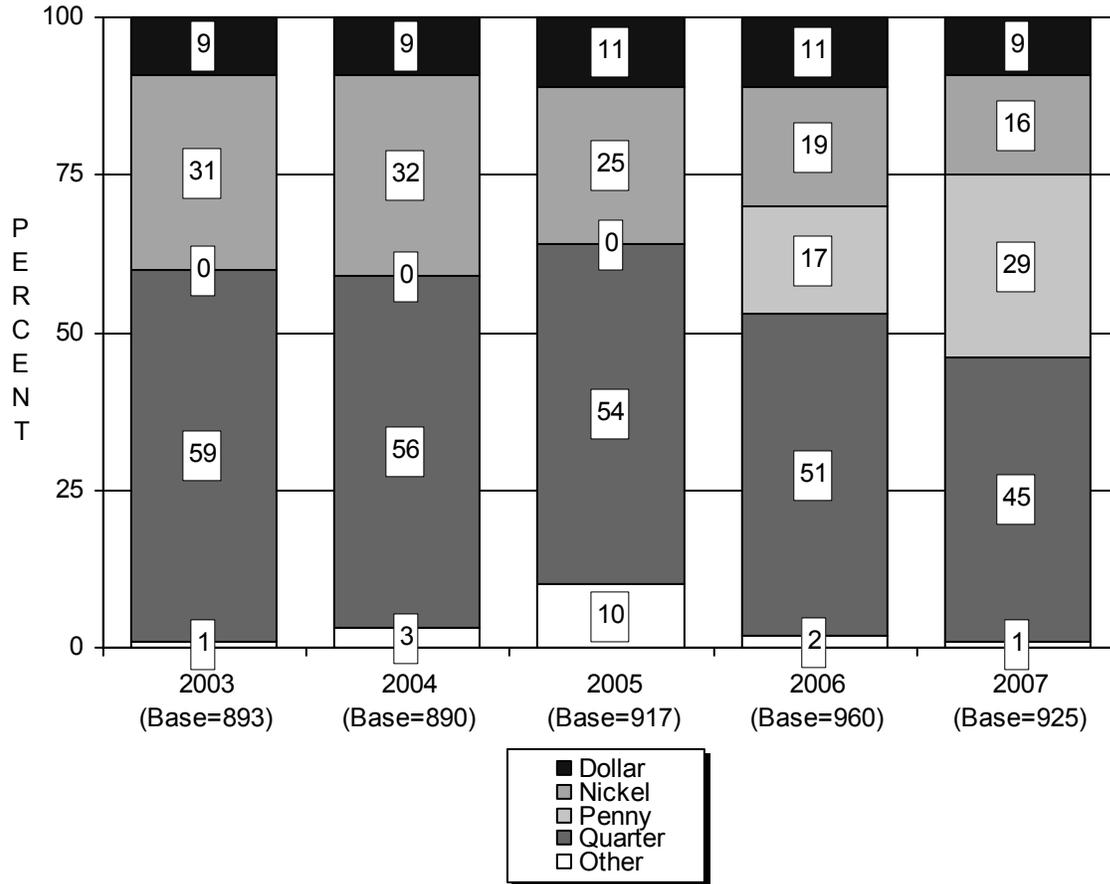


As Figure 57 shows, 54% of gamblers in 2007 played slot machines most often. Twenty-one percent (21%) said they played video poker machines (down from 25% in both 2005 and 2006), followed by 8% who said blackjack (down from 11% in 2003, 2004, and 2005). Five percent (5%) played poker most often, and 4% each played craps or the sports book most often.

* 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 58
Machine Denomination Played Most Often*
(Among Those Who Played Slot And Video Machines)

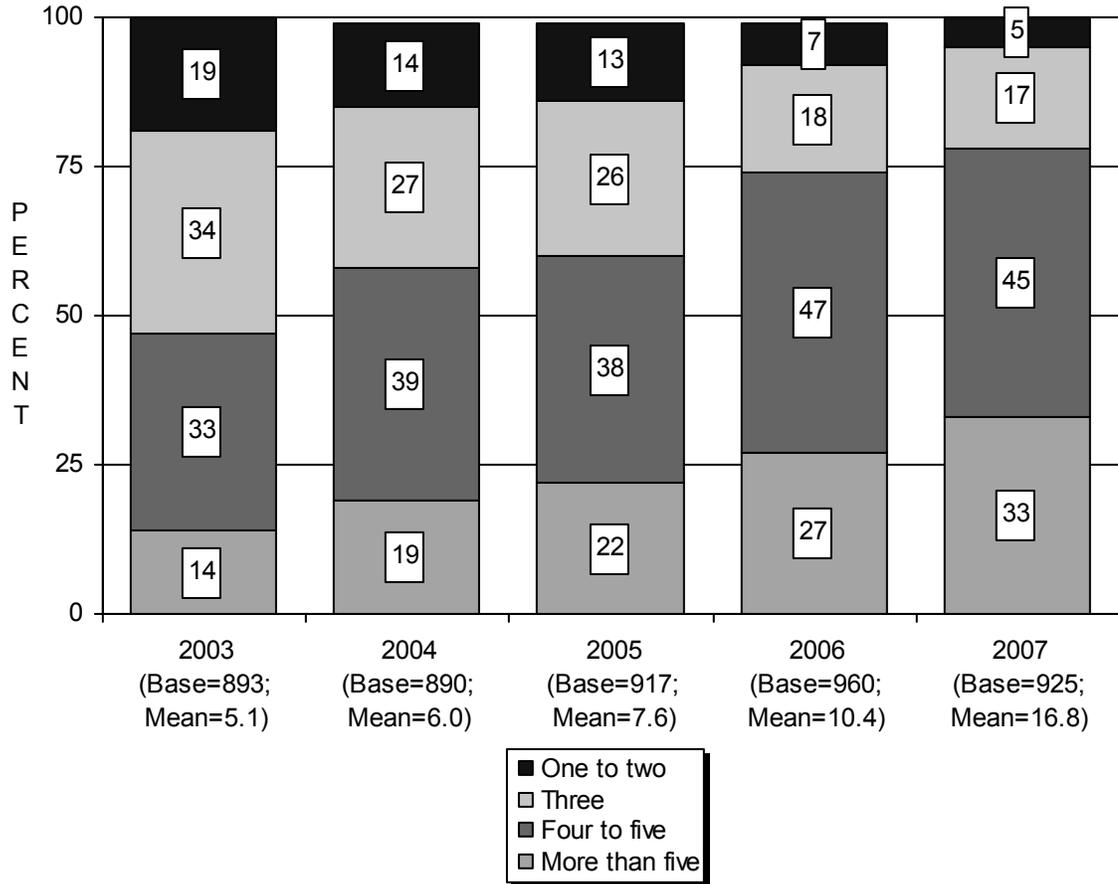


Among those who played slot and video machines in 2007, 45% played quarter machines most often (down from all prior years), 29% played penny slots (up from 17% last year), 16% played nickel machines most often (down from 31% in 2003, 32% in 2004, and 25% in 2005), and 9% played dollar machines most often (Figure 58).

* 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.

In an effort to track the increasing popularity of penny slots in Laughlin, the penny denomination was first added to the list in 2006 and first reported this year.

FIGURE 59
 Average Coins/Tokens For Each Play*
 (Among Those Who Played Slot And Video Machines)

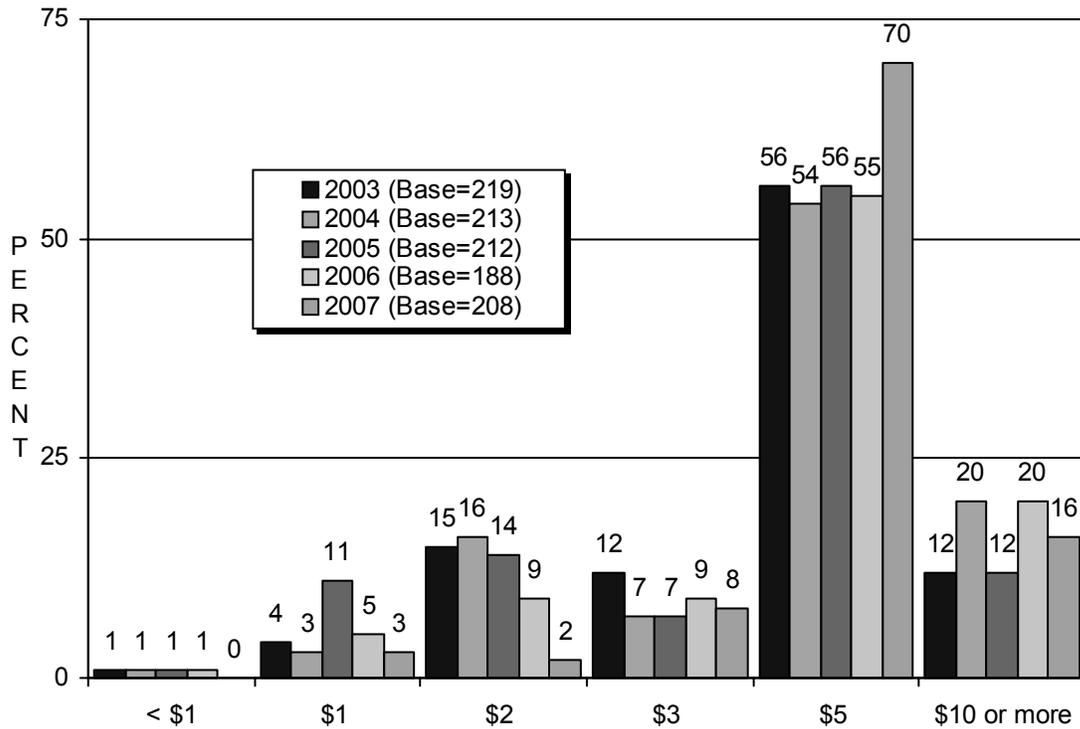


Visitors who played slot and video machines were asked, on average, how many coins or tokens they usually insert before each play on a machine (Figure 59). The average number of coins or tokens per play was 16.8, up significantly from the all previous averages. There has been a dramatic increase in the number of coins/tokens played, likely due to the increased popularity of penny machines.

* 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.

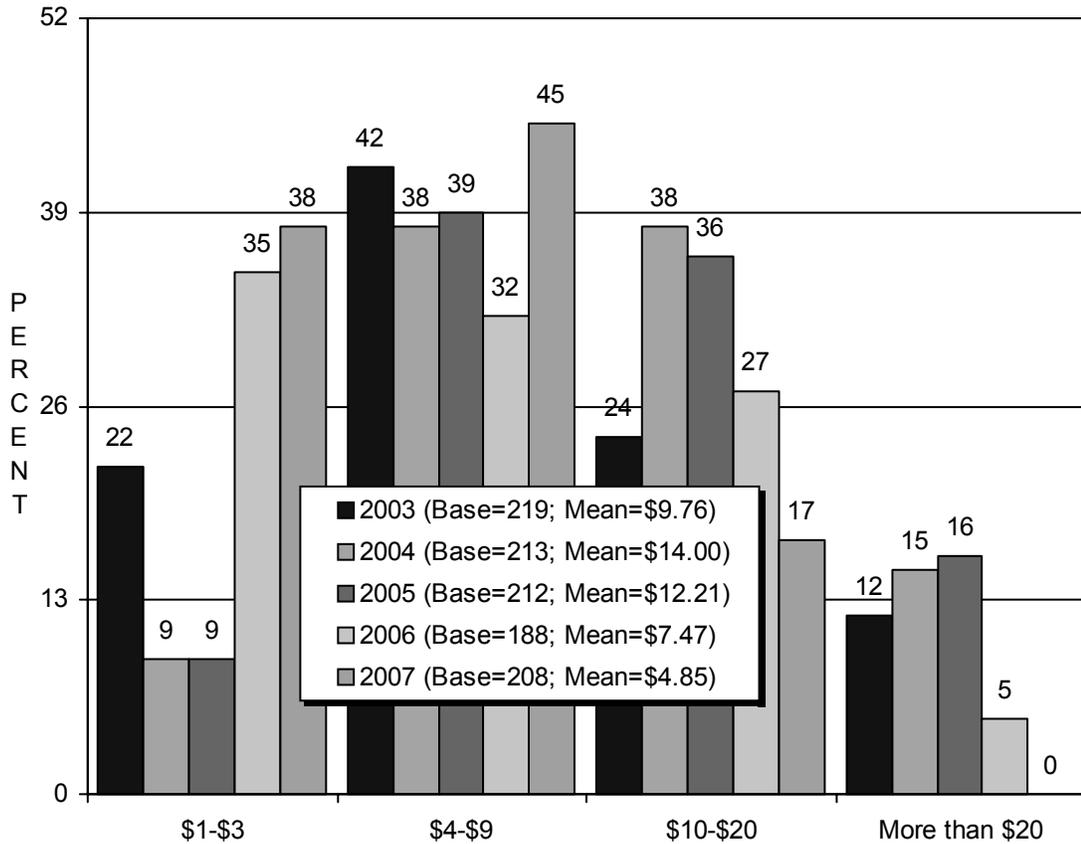
FIGURE 60
Table Minimum Played Most Often*
(Among Those Who Played Table Games)



As Figure 60 shows, those who played table games most often in 2007 were most likely to say they played games with a \$5.00 minimum (70%, up from all prior years). Sixteen percent (16%) played games with a \$10.00 or greater minimum. Three percent (3%) played \$1.00 minimum tables (a significant decrease from 11% in 2005), while 2% played a \$2.00 minimum (down from all 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.

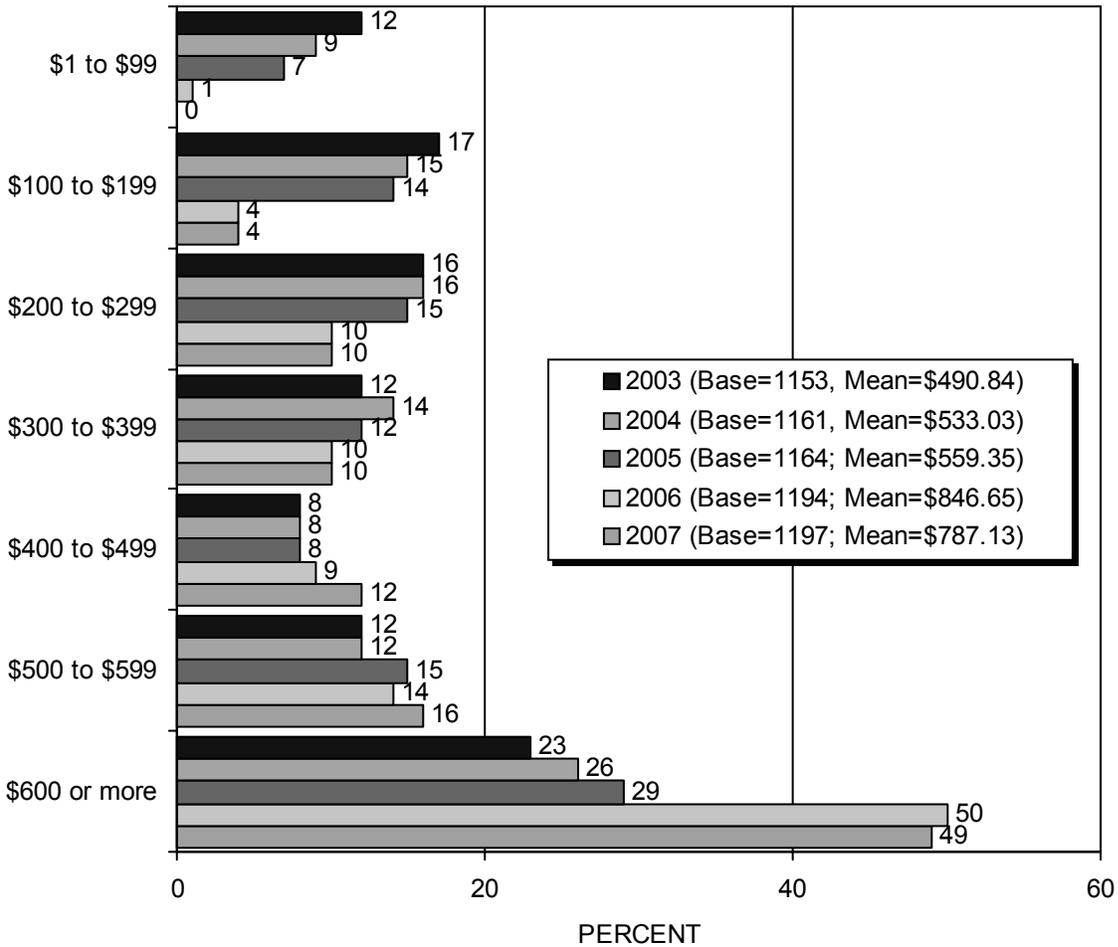
FIGURE 61
Average Bet — Table Games*
 (Among Those Who Played Table Games)



We asked those who played table games about the size of their usual bet (Figure 61). The current average bet is \$4.85, down significantly from \$9.76 in 2003, \$14.00 in 2004, \$12.21 in 2005, and \$7.47 last year. Thirty-eight percent (38%) said their average bet was from \$1 to \$3, a significant increase from 22% in 2003, and 9% in both 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.

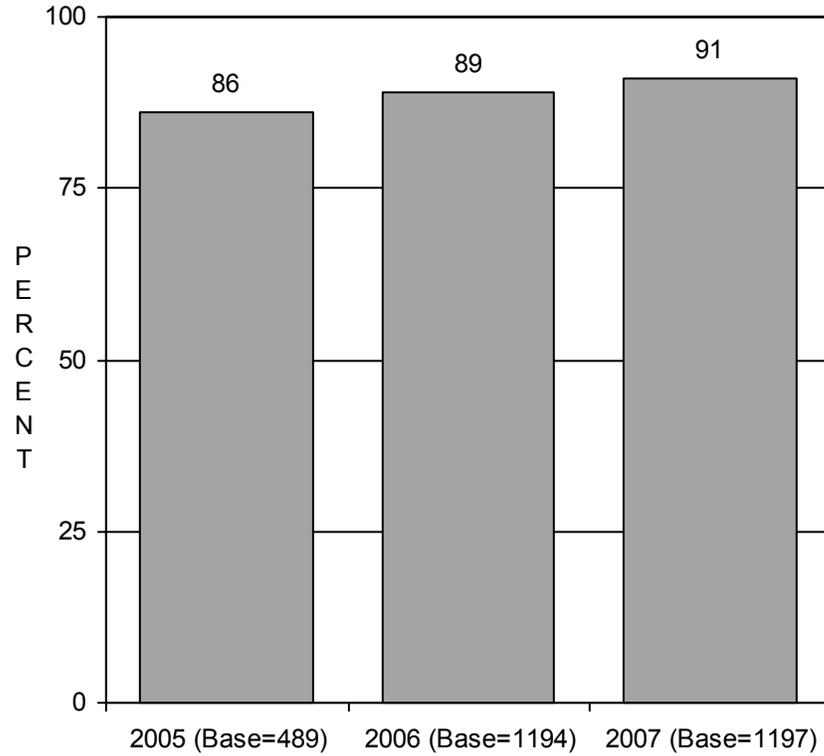
FIGURE 62
Trip Gambling Budget*
(Among Those Who Gambled)



The average gambling budget reported by visitors to Laughlin was \$787.13, down slightly from last year, but up significantly from \$490.84 in 2003, \$533.03 in 2004, and \$559.35 in 2005 (Figure 62).

* 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.

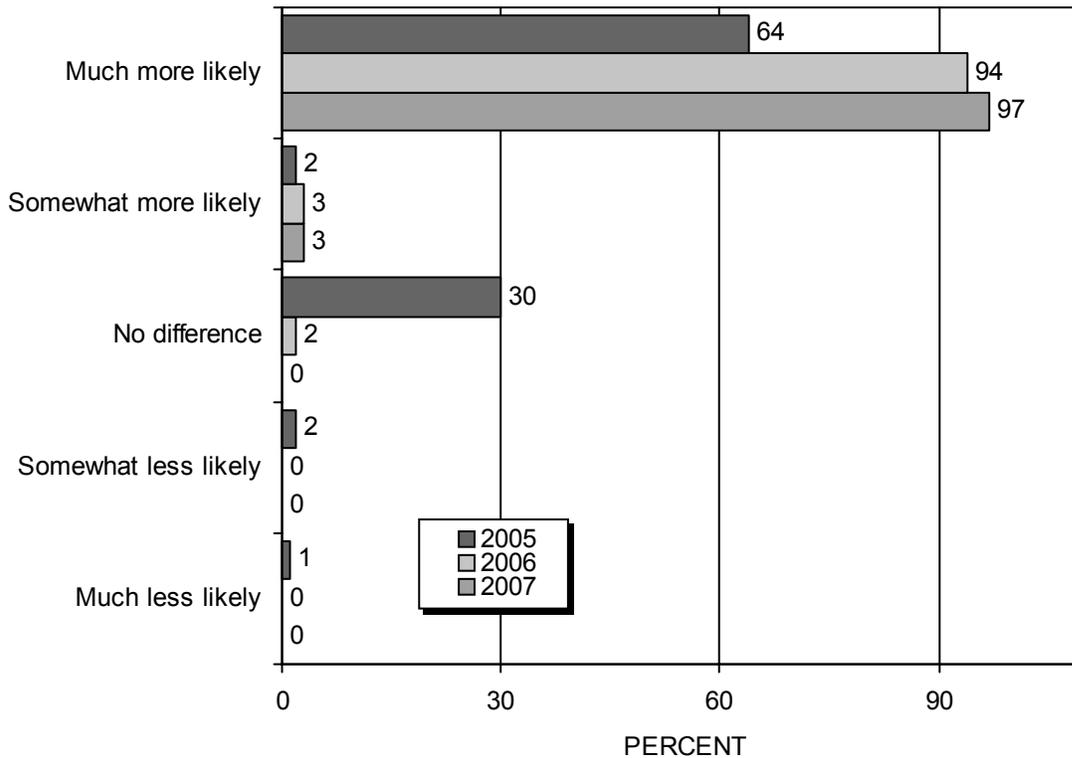
FIGURE 63
Whether Member of A Slot/Loyalty Club*



Beginning in August 2005, visitors 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 2007 ninety-one percent (91%) said that they were, an increase from 86% in 2005 (Figure 63).

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

FIGURE 64
Likelihood Of Visiting Laughlin With
More Places To Gamble Outside Laughlin

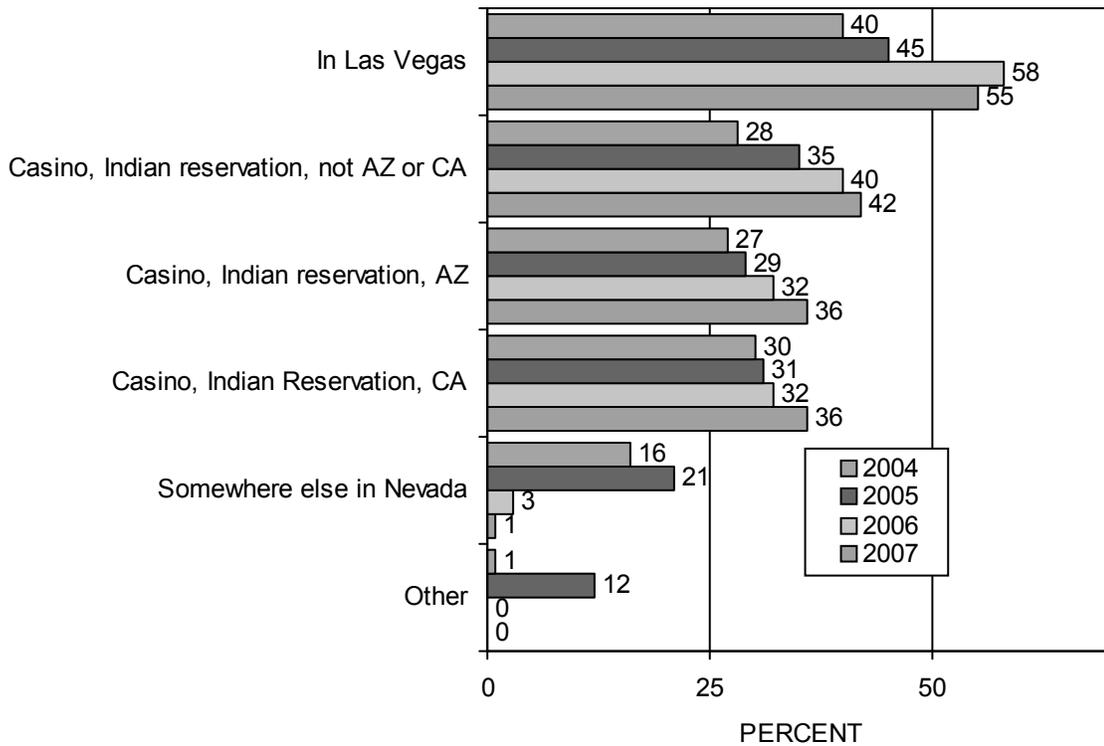


Beginning in 2005, all visitors to Laughlin were asked the following:

“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 97% of 2007 visitors 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. Less than one percent said it made no difference in their decision to visit Laughlin, or that having other places to gamble made them *less* likely to visit Laughlin (Figure 64).

FIGURE 65
 Where Visitors Gambled Outside Laughlin*
 (Among All Visitors)



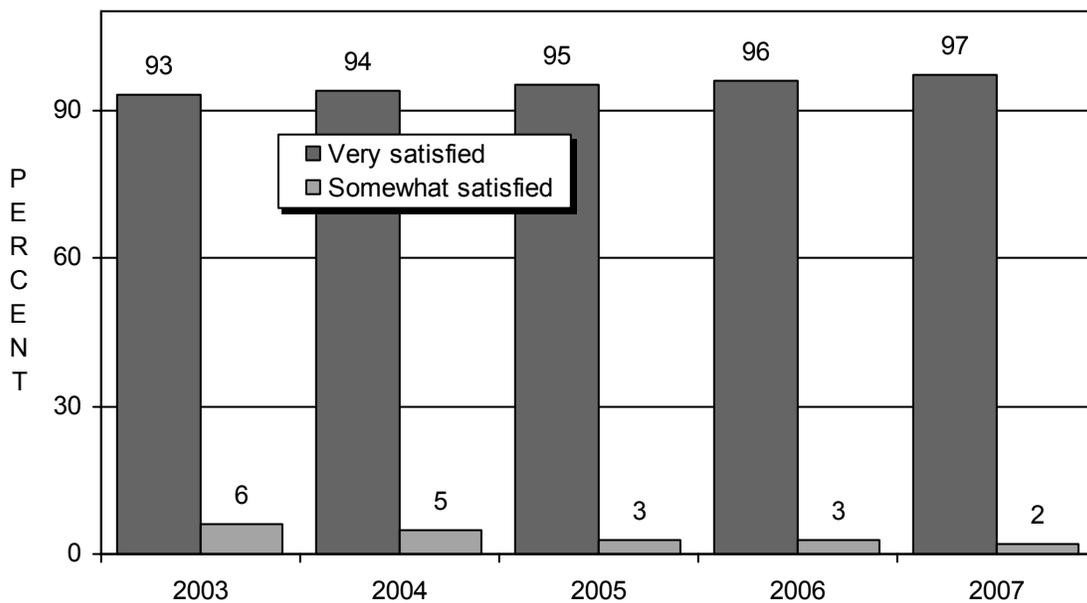
Starting in 2004, all visitors were asked about any gambling they had done at specific locations outside Laughlin within the past 12 months (Figure 65). Fifty-five percent (55%) of Laughlin visitors in 2007 reported gambling recently in Las Vegas, an increase from 40% in 2004 and 45% in 2005. More than four in ten (42%) gambled at an Indian reservation outside of Arizona or California, an increase from 28% in 2004 and 35% in 2005, and 36% gambled at an Indian reservation in California during the past year, an increase from 30% in 2004, 31% in 2005, and 32% last year. More than one-third (36%) said they gambled at an Indian reservation in Arizona (up from 27% in 2004 and 29% in 2005), and 1% also reported gambling at other locations in Nevada, a decrease from 16% in 2004, 21% in 2005, and 3% last year.

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

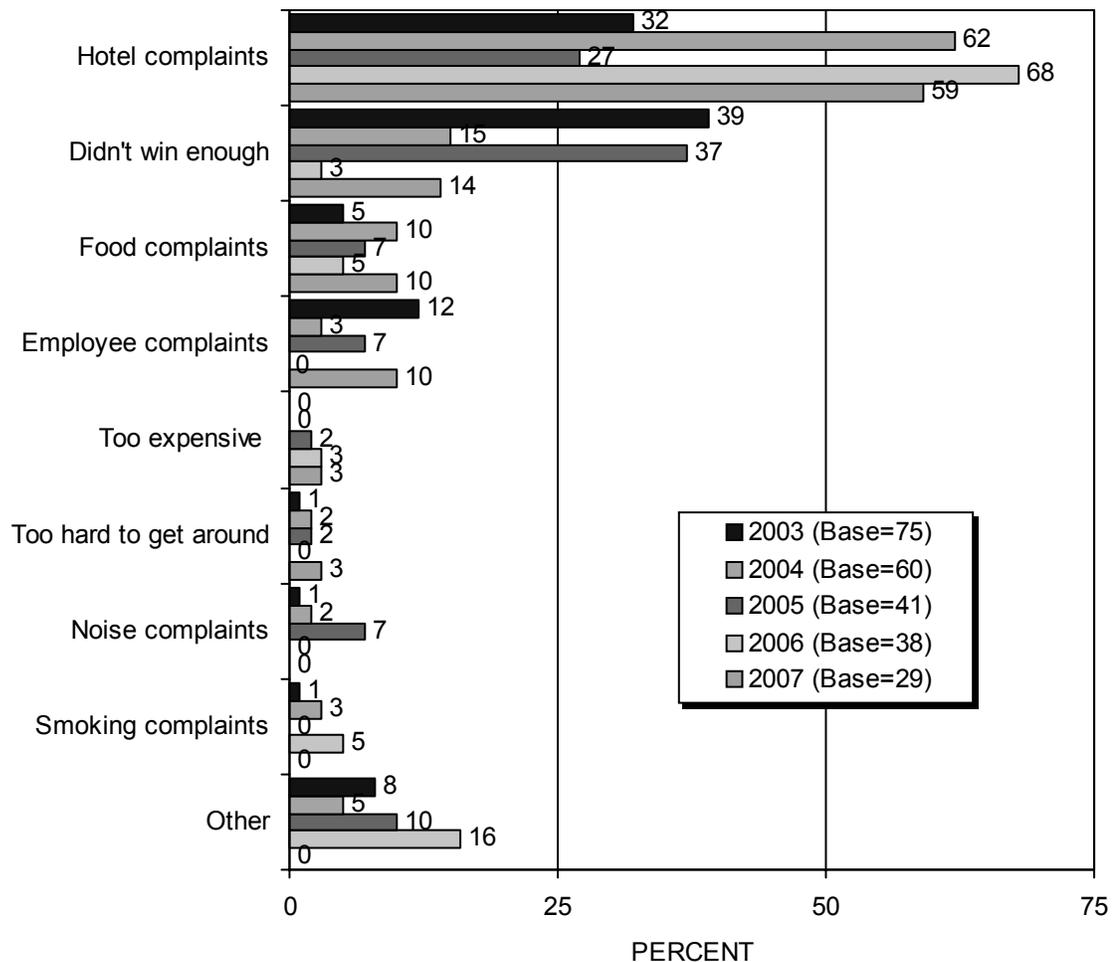
Ninety-seven percent (97%) of visitors said they were “very satisfied” with their visit to Laughlin in the 2007 survey (Figure 66), up from 93% in 2003, 94% in 2004, and 95% in 2005. The proportion who said they were “somewhat satisfied” was 2%, down from 6% in 2003 and 5% in 2004. Only 5 visitors of the 1200 surveyed (less than 1%) said they were at all dissatisfied with their visit to Laughlin.

FIGURE 66
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 67
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 67). Of the 29 visitors in this category, more than one-half (59%) expressed complaints with their hotels as the primary reason, a significant increase from 32% in 2003 and 27% in 2005. Fourteen percent (14%) said they were not very satisfied because they did not win enough money gambling, down from 39% in 2003 and 37% in 2005. Ten percent (10%) complained about either the food or the employees, and 3% said Laughlin was either too expensive or too hard to get around.

* 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 68
Likelihood of Returning to Laughlin Next Year

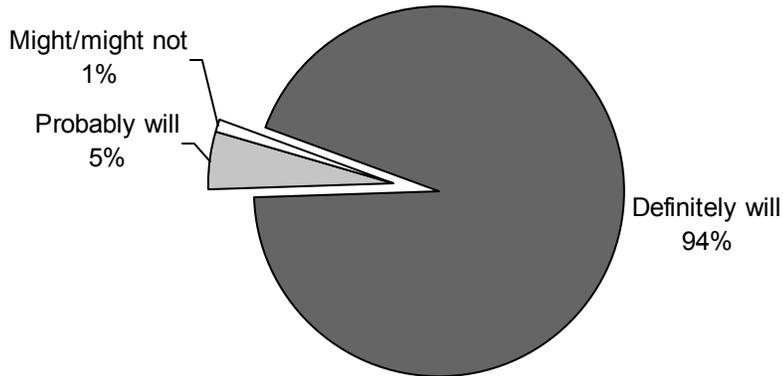
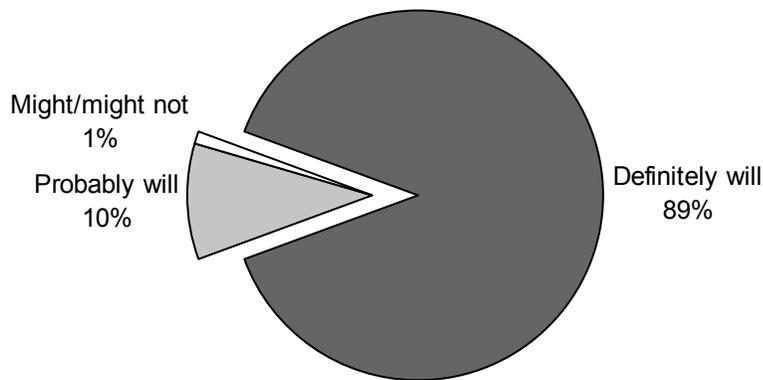


FIGURE 69
Likelihood of Recommending Laughlin to Others



Visitors were asked for the first time in 2007 how likely they are to return to Laughlin next year (Figure 68) and how likely they are to recommend Laughlin to others (Figure 69). Most (94%) said they “definitely will” return to Laughlin next year, and 89% said they will recommend Laughlin to others.

VISITOR DEMOGRAPHICS

As Figures 70 and 71 show, 2007 visitors were most likely to be married (78%) and white (85%, down from 89% in 2005). Three in ten visitors are from Southern California (30%, down from 38% in 2003 and 39% in 2004), and 6% were foreign visitors (similar to last year, but higher than 3% in 2003, and 4% each in 2004 and 2005). Forty-four percent (44%) were 65 or older, up from 38% in 2003. Visitors are still more likely to be retired (54%, down significantly from 59% each in 2004 and 2005) than employed (43%, up from 38% in 2004 and 35% in 2005). The largest proportion of visitors have a high school diploma or less (44%, up from 39% each in 2003 and 2005, and 40% in 2004). More than one-half (56%) have a household income of less than \$60,000, while 43% have incomes of \$60,000 or more, up from 36% in 2003, 35% in 2004, and 35% in 2005.

FIGURE 70
VISITOR DEMOGRAPHICS

	YEAR 2003	YEAR 2004	YEAR 2005	YEAR 2006	YEAR 2007
<u>GENDER</u>					
Male	50%	50%	50%	50%	51%
Female	50	50	50	50	49
<u>MARITAL STATUS</u>					
Married	76	77	77	76	78
Single	7	8	9	8	7
Separated/divorced	10	7	6	6	6
Widowed	7	9	8	9	8
<u>EMPLOYMENT</u>					
Employed	43	38	35	45	43
Unemployed	1	1	1	0	0
Student	0	0	1	0	0
Retired	54	59	59	53	54
Homemaker	3	3	5	2	3
<u>EDUCATION</u>					
High school or less	39	40	39	44	44
Some college	32	33	32	30	35
College graduate	27	26	26	23	20
Trade/vocational school	2	2	4	3	1
<u>AGE</u>					
21 to 29	4	2	2	2	2
30 to 39	9	7	6	6	5
40 to 49	13	12	11	14	12
50 to 59	22	20	21	21	21
60 to 64	15	14	17	14	16
65 or older	38	45	44	44	44
MEAN	58.4	60.4	60.9	60.3	60.9
BASE	(1199)	(1200)	(1200)	(1200)	(1200)

FIGURE 71
VISITOR DEMOGRAPHICS
(Continued/2)

	YEAR 2003	YEAR 2004	YEAR 2005	YEAR 2006	YEAR 2007
ETHNICITY					
White	85%	86%	89%	88%	85%
African-American/Black	3	3	3	2	1
Asian/Asian American	1	1	1	1	2
Hispanic/Latino	9	9	6	8	10
Other	1	1	2	2	1
HOUSEHOLD INCOME					
Less than \$20,000	6	5	5	2	2
\$20,000 to \$39,999	24	19	17	20	20
\$40,000 to \$59,999	24	25	20	27	34
\$60,000 to \$79,999	18	15	16	20	19
\$80,000 or more	18	20	19	25	24
Not sure/no answer	9	17	23	7	2
VISITOR ORIGIN					
<u>U.S.A.</u>	<u>97</u>	<u>96</u>	<u>96</u>	<u>94</u>	<u>94</u>
Eastern states*	2	2	3	2	3
Southern states [†]	7	6	7	8	7
Midwestern states [‡]	11	11	12	14	13
<u>Western states[§]</u>	<u>76</u>	<u>77</u>	<u>75</u>	<u>69</u>	<u>70</u>
<u>California</u>	40	41	36	33	32
Southern California	38	39	34	31	30
Northern California	2	2	2	2	2
Arizona	21	22	24	21	23
Other West	15	14	15	14	15
No ZIP code given	0	0	0	0	0
<u>Foreign</u>	<u>3</u>	<u>4</u>	<u>4</u>	<u>7</u>	<u>6</u>
BASE	(1199)	(1200)	(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.....51%

FEMALE49

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 14%	SKIP TO A6 ON PAGE 3
VISITED BEFORE .86	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.)**

10.21 MEAN (ALL VISITORS)
11.72 MEAN (REPEAT VISITORS) (N=1032)

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

2.29 MEAN (ALL VISITORS)
2.50 MEAN (REPEAT VISITORS) (N=1032)

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?

YES 31% (N=1032)
 NO 69
 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=1032)

VACATION/PLEASURE 49%
 TO GAMBLE..... 26
 VISIT FRIENDS/RELATIVES 13
 TO ATTEND A SPECIAL EVENT
 (E.G., DESERT CHALLENGE, A
 RODEO, A CAR OR MOTORCYCLE
 RALLY, OR AN OUTDOOR
 CONCERT).....4
 CONVENTION/OTHER BUSINESS
 PURPOSES.....2
 WATER-BASED RECREATION.....2
 JUST PASSING THROUGH4
 SOME OTHER REASON1
 NOT SURE/DK0
 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 46%
- TO GAMBLE 37
- VISIT FRIENDS/RELATIVES..... 10
- 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..... 2
- TO ATTEND/PARTICIPATE IN A
 CASINO TOURNAMENT 1
- WATER-BASED RECREATION 1
- JUST PASSING THROUGH 1
- SOME OTHER REASON 0
- NOT SURE/DK..... 0
- REFUSED/NA 0

**INTERVIEWER:
 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 22%
- NO 78
- NOT SURE/DK..... 0
- REFUSED/NA 0

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

- Air..... 13%
- Bus
 (IF "YES" ASK, "Do you mean...":)
 Regularly scheduled bus
 service like Greyhound 1
 Or a chartered or escorted
 bus service or bus tour 4
- Automobile..... 78
- Motorcycle 1
- Recreational
 Vehicle (RV)..... 2
- REFUSED/NA..... 0

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

- SAME DAY 2%
- 1-3 DAYS BEFORE..... 9
- 4-6 DAYS BEFORE..... 3
- 7-14 DAYS BEFORE..... 32
- 15-30 DAYS BEFORE..... 29
- 31-60 DAYS BEFORE..... 14
- 61-90 DAYS BEFORE..... 7
- MORE THAN 90 DAYS BEFORE 5
- NOT SURE/DK..... 0
- REFUSED/NA..... 0

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

YES5%	SKIP TO B4
NO95	ASK B3a
NOT SURE/DK.....0	SKIP TO B4a
REFUSED/NA0	

B3a. What is the MAIN reason you did not use a travel agent to help you plan your trip? **(ACCEPT ONLY ONE RESPONSE.)** (N=1144)

- CALLED 800#88%
- USED THE INTERNET7
- LAST MINUTE DECISION/NO TIME4
- PREFER TO MAKE MY OWN PLANS1
- ALL OTHER MENTIONS0

AFTER ASKING B3a, SKIP TO B4a



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

B4. Did the travel agent... **(READ LIST)**
(N=55)

	<u>YES</u>	<u>NO</u>	<u>DON'T KNOW</u>	<u>RE-FUSED</u>
Influence your decision to visit Laughlin?	18%	82%	0%	0%
Influence your choice of accommodations?	82	18	0	0
"Book" your accommodations?	96	4	0	0
"Book" your transportation?	96	4	0	0

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

YES7%	ASK B4b
NO93	SKIP TO B5
NOT SURE/DK.....0	
REFUSED/NA0	

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=86)

	<u>YES</u>	<u>NO</u>	<u>DON'T KNOW</u>	<u>RE-FUSED</u>
"Book" your accommodations?	97%	4%	0%	0%
"Book" your transportation?	16	83	0	1

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

(N=8)

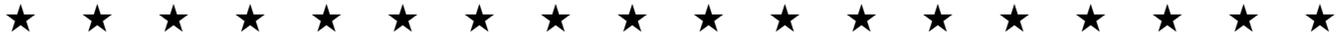
	<u>YES</u>	<u>NO</u>	<u>DON'T KNOW</u>	<u>RE-FUSED</u>
Influenced your decision to visit Laughlin?	0%	99%	0%	1%
Influenced your choice of accommodations?	44	55	0	1

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

DO NOT READ THESE RESPONSE CODES		
DOES NOT APPLY	DON'T KNOW	RE-FUSED
0%	0%	0%
0	0	0
65	0	0

	Before Leaving Home	While En Route To Laughlin	After Arrival
AMONG ALL RESPONDENTS:			
a. Where you would stay?	93%	2%	5%
b. Where you would gamble?	92	2	6
c. Which shows you would see?..	16	2	17

	Before Leaving Home	While En Route To Laughlin	After Arrival	DK/NA	
AMONG THOSE TO WHOM THE QUESTION APPLIES:					
a. Where you would stay?	93%	2%	5%	0%	(N=1200)
b. Where you would gamble?	93	2	6	0	(N=1197)
c. Which shows you would see?..	47	5	48	1	(N=420)



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

FROM PERMANENT RESIDENCE 93%	SKIP TO C1
FROM ANOTHER LOCATION 7	ASK B7
NOT SURE/DK..... 0	SKIP TO C1
REFUSED/NA 0	

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

Air..... 99% (N=78)
Automobile, truck, RV, bus 1

B7. Where are you traveling from? (PROBE FOR LOCATION IMMEDIATELY PRIOR TO LAUGHLIN VISIT.) (N=84)

LAS VEGAS93%	ASK B7a
ARIZONA5	SKIP TO C1
CALIFORNIA.....1	
OTHER.....1	
NOT SURE/DK.....0	
REFUSED/NA0	

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 99%
 MOTEL 0
 RV PARK 1
 FRIENDS/RELATIVES 0
 DAYTRIP/OTHER..... 0

LOCATION OF LODGING

LAUGHLIN 99%
 BULLHEAD CITY 0
 LOCATION COULD NOT BE
 DETERMINED 1

**TYPE OF LODGING
 (AMONG THOSE WHO STAYED OVERNIGHT)
 (N=1200)**

HOTEL 99%
 MOTEL 0
 RV PARK 1
 FRIENDS/RELATIVES 0
 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, THEN SKIP TO C9 ON PAGE 9.**

**IF RESPONSE TO C1 IS CODE #4000 OR HIGHER,
 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=1200)
- a. Booked by phone, calling the hotel, motel, or RV park directly.. 83%
 - b. Booked through a travel agent (either in person or by phone).....5
 - c. Booked by phone but not by calling the hotel directly and not through a travel agent1
 - d. Booked at a website on the Internet7
 - e. Booked in person at the hotel, motel, or RV park5
 - f. The trip was a gift, prize, or incentive, so the accommodations were booked for you0
 - g. Not sure because someone else in your party booked the hotel and you don't know how they did it.....0
- OTHER (SPECIFY:)
(VOLUNTEERED).....0
REFUSED/NA (VOLUNTEERED).....0

- C1b. **(IF RESPONSE "d" IN C1a IS CHOSEN, ASK:)** Which Web site did you use to book your accommodations? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).** (N=86)
- AOL (AMERICA ONLINE).... 1%
 - EXPEDIA.COM 6
 - HOTWIRE.COM 1
 - ORBITZ 1
 - PRICELINE.COM 0
 - TRAVEL.COM 0
 - TRAVELOCITY 2
 - YAHOO 9
 - HOTEL WEB SITE (ANY)..... 69
 - OTHER..... 11
 - 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=1200)
- SAME DAY 5%
 - 1-3 DAYS BEFORE 9
 - 4-6 DAYS BEFORE 3
 - 7-14 DAYS BEFORE 31
 - 15-30 DAYS BEFORE 28
 - 31-60 DAYS BEFORE 14
 - 61-90 DAYS BEFORE 7
 - MORE THAN 90 DAYS BEFORE 4
 - 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=1192)
- ONE9%
 - TWO84
 - THREE.....4
 - FOUR OR MORE3
 - REFUSED/NA.....0
- 2.01 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=1192)

HOTEL/AIRLINE PACKAGE DEAL.....9%	ASK C6
HOTEL/AMENITIES PACKAGE DEAL.....1	
TOUR/ TRAVEL GROUP1	
CONVENTION GROUP/ COMPANY MEETING....0	SKIP TO C8
CASINO RATE41	
REGULAR FULL-PRICE ROOM RATE....11	
CASINO COMPLIMENTARY37	SKIP TO C9
ANOTHER RATE0	SKIP TO C8
NOT SURE/DK.....0	
REFUSED/NA0	

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

\$0 - \$492% (N=126)
 \$50 - \$99 15
 \$100 - \$14920
 \$150 OR MORE64
 NOT SURE/REFUSED ...0
\$242.32 MEAN
\$199.00 MEDIAN

C6a. How did you *first* find out about this package? **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=126)

OUTDOOR BILLBOARD 0%
 BROCHURE 2
 E-MAIL OFFER..... 0
 INTERNET AD (POP-UP OR BANNER AD) 2
 OFFER RECEIVED IN THE MAIL.... 27
 NEWSPAPER..... 10
 RADIO 2
 RESERVATION AGENT/ CALL CENTER..... 15
 TELEVISION.....0
 TRAVEL AGENT 33
 ANY WEB SITE 0
 WORD-OF-MOUTH..... 10
 OTHER 0
 NOT SURE/DK0
 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 13% (N=625)
 \$25 - \$49..... 65
 \$50 OR MORE..... 22
 NOT SURE/NO ANSWER... 0
\$41.76 MEAN
\$39.00 MEDIAN

C8a. How did you *first* find out about the room rate you paid? (**DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.**) (N=625)

- OUTDOOR BILLBOARD.....1%
- BROCHURE.....2
- E-MAIL OFFER1
- INTERNET AD (POP-UP OR BANNER AD).....6
- OFFER RECEIVED IN THE MAIL ..57
- NEWSPAPER6
- RADIO1
- RESERVATION AGENT/ CALL CENTER.....18
- TRAVEL AGENT0
- ANY WEB SITE.....2
- WORD-OF-MOUTH5
- OTHER0
- NOT SURE/DK.....0
- REFUSED/NA0

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..... 8%
- 2..... 84
- 3..... 4
- 4..... 3
- 5 OR MORE 1
- 2.05 MEAN
- 2.00 MEDIAN

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

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

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

- DAYTRIP 0%
- 1 8
- 2 36
- 3 30
- 4 16
- 5 OR MORE..... 11
- 2.95 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 0%
- 2 8
- 3 36
- 4 30
- 5 16
- 6 OR MORE..... 11
- 3.95 MEAN
- 4.00 MEDIAN

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

- SUNDAY 17%
- MONDAY 18
- TUESDAY 12
- WEDNESDAY..... 12
- THURSDAY 11
- FRIDAY 16
- SATURDAY 13
- REFUSED/NA..... 0

D1. Have you gambled during this visit to Laughlin?

YES99.8%	ASK D2
NO0.2	
NOT SURE/DK.....0	
REFUSED/NA0	
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=1197)

1 TO 2 HOURS	11%
3 TO 4 HOURS	25
5 TO 6 HOURS	28
7 TO 8 HOURS	20
9 TO 10 HOURS	10
MORE THAN 10 HOURS.....	6
<u>5.92</u> MEAN	
<u>6.00</u> MEDIAN	

D3. How many different casinos have you gambled at during your stay in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)** (N=1197)

1.....	69%
2.....	20
3.....	7
4.....	2
5 TO 6.....	2
MORE THAN 6.....	0
<u>1.48</u> MEAN	
<u>1.00</u> MEDIAN	

D4. Which type of casino game do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=1197)

SLOT MACHINES	54%	ASK D5
VIDEO POKER.....	21	
OTHER VIDEO MACHINES (21, KENO, ETC.)	2	
BACCARAT	0	
BIG 6.....	0	SKIP TO D7
BINGO	1	SKIP TO D10
BLACKJACK.....	8	SKIP TO D7
CARIBBEAN STUD POKER	0	
CRAPS	4	
KENO.....	1	
POKER	5	SKIP TO D7
RACE/SPORTS-BOOK	4	SKIP TO D10
ROULETTE.....	1	SKIP TO D7
OTHER	0	SKIP TO D10
NOT SURE/DK	0	
REFUSED/NA.....	0	



D5. Which denomination machine do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=925)

PENNY	29%
NICKEL.....	16
DIME	0
QUARTER	45
HALF DOLLAR	1
DOLLAR	9
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=925)

1-25%
 3..... 17
 4-545
 6 OR MORE 33
 REFUSED/NO ANSWER... 0
16.80 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=208)

LESS THAN \$1.00 0%
 \$1.00.....3
 \$2.00.....2
 \$3.00.....8
 \$5.00.....70
 \$10.00 12
 \$25.004
 \$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=208)

\$1 - \$338%
 \$4 - \$945
 \$10 - \$20 17
 OVER \$200
 DON'T KNOW/NO ANSWER.. 1
\$4.85 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=1197)

\$1 - \$99.....0%
 \$100 - \$199.....4
 \$200 - \$299.....10
 \$300 - \$399.....10
 \$400 - \$499.....12
 \$500 - \$599.....16
 \$600 OR MORE.....49
 NOT SURE/NO ANSWER.....0
\$787.13 MEAN
\$500.00 MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts?

YES..... 91%
 NO 9
 NOT SURE/DK..... 0 (N=1197)
 REFUSED/NA..... 0

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..... 36%
- B. At a casino on an Indian reservation in Arizona..... 36
- C. At a casino on an Indian reservation outside Arizona or California..... 42
- I. In Las Vegas, Nevada..... 55
- J. Somewhere else in Nevada (outside the Laughlin area)..... 1
- 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..... 97%
 - SOMEWHAT MORE LIKELY3
 - NO DIFFERENCE0
 - SOMEWHAT LESS LIKELY0
 - MUCH LESS LIKELY0
 - NOT SURE/DK.....0
 - REFUSED/NA0
- 4.96 MEAN

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

- YES 75%
- NO25
- NOT SURE/DK..... 0
- REFUSED/NA0

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..... 17%	ASK B13
NO 82	SKIP TO B14
NOT SURE/DK 0	
REFUSED/NA..... 0	

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

(N=207)

- A. Downtown Las Vegas (that is, the area on or near Fremont Street)?..... 27%
- B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)? 73

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.....2%	ASK B15
NO 98	SKIP TO C15
NOT SURE/DK 0	
REFUSED/NA..... 0	

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

(N=22)

- A. **[DO NOT ASK]**
- B. Hoover Dam? 18%
- C. Lake Mead? 9
- D. Lake Havasu/ Colorado River?.. 27
- E. Lake Mojave/ Davis Dam? 5
- F. Grand Canyon? .. 32
- G. Bryce Canyon? ... 0
- H. Zion National Park? 0
- I. Oatman, Arizona? 14
- X. Other? 9

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.)**

\$183.26 MEAN (INCLUDING \$0)
\$183.72 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.)**

\$0.86 MEAN (INCLUDING \$0)
\$93.73 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) \$40.53 MEAN (INCLUDING \$0)
\$118.91 MEAN (EXCLUDING \$0)

B. Shows/entertainment (not including gambling) \$2.40 MEAN (INCLUDING \$0)
\$31.00 MEAN (EXCLUDING \$0)

C. Sightseeing \$0.27 MEAN (INCLUDING \$0)
\$21.67 MEAN (EXCLUDING \$0)

D. Other \$0.14 MEAN (INCLUDING \$0)
\$56.67 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..... 97%	SKIP TO G1 ON PAGE 13
Somewhat satisfied 2	ASK F2
Somewhat dissatisfied 0	SKIP TO F3
Very dissatisfied 0	
<u>DO NOT READ</u>	SKIP TO G1 ON PAGE 13
NOT SURE/DK..... 0	
REFUSED/NA 0	

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=29)

- HOTEL COMPLAINTS 59%
- DIDN'T WIN ENOUGH MONEY 14
- EMPLOYEE COMPLAINTS 10
- FOOD/FOOD SERVICE COMPLAINTS 10
- TOO EXPENSIVE 3
- TOO HARD TO GET AROUND 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 60%
- DIDN'T WIN ENOUGH MONEY 40



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	43%	ASK G2
Unemployed	0	SKIP TO G3
Student	0	
Retired	54	
Homemaker.....	3	
<u>DO NOT READ</u>		SKIP TO G3
REFUSED/NA	0	

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=513)

- SALES/CLERICAL WORKERS .. 25%
- SERVICE WORKERS
- MANAGERS/OFFICIALS/ PROPRIETORS
- PROFESSIONAL/TECHNICAL... .. 20
- CRAFT WORKERS/FOREMEN.. 11
- OTHER
- REFUSED/NO ANSWER..... 2

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

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

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

- Married.....78%
- Single.....7
- Separated or divorced
- Widowed
- 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.....	3%
SOUTH.....	7
MIDWEST.....	13
WEST.....	70
CALIFORNIA.....	32
ARIZONA.....	23
OTHER WEST.....	15
FOREIGN VISITORS.....	6
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.....	85%
BLACK OR AFRICAN AMERICAN.....	1
ASIAN OR ASIAN AMERICAN.....	2
HISPANIC/LATINO.....	10
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.)**

60.87 MEAN
63.00 MEDIAN

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

21 to 29.....	2%
30 to 39.....	5
40 to 49.....	12
50 to 59.....	21
60 to 64.....	16
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.....	7
C. \$30,000 to \$39,999.....	13
D. \$40,000 to \$49,999.....	18
E. \$50,000 to \$59,999.....	16
F. \$60,000 to \$69,999.....	10
G. \$70,000 to \$79,999.....	9
H. \$80,000 to \$89,999.....	7
I. \$90,000 to \$99,999.....	2
J. \$100,000 to \$149,999.....	10
K. \$150,000 or more.....	5
NOT SURE/DK.....	0
REFUSED/NA.....	2

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/AMENITIES 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**