2008 Laughlin

Visitor Profile Study

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LAUGHLIN VISITOR PROFILE

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By:

GLS Research

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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.

This report presents the findings from the 1,200 personal interviews conducted by GLS Research from January 1, 2008 to December 31, 2008. 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.

NOTE: The impact of the national and global economic slowdown that became more pronounced in the last quarter of 2008 and the early months of 2009 is only partially reflected in the 2008 Laughlin Visitor Profile. The data reported here represents trip characteristic averages for visitors in Laughlin over the course of the <u>entire</u> year of 2008. National and global economic factors negatively affecting the travel industry – especially in terms of the number of people traveling – are not accounted for in this report.

REASONS FOR VISITING

Twelve percent (12%) of visitors were first-time visitors to Laughlin (down from 2004 to 2006). Among first-time visitors, 58% said their primary reason for visiting Laughlin was vacation or pleasure (down from 2004 to 2005), while 14% mentioned gambling (up from 2004 to 2005). Among repeat visitors, 33% mentioned vacation or pleasure as their primary reason for their current visit (down from past years), while gambling was cited by 51% (up from past years). The average number of Laughlin visits among all visitors in the past year was 2.3, down from 2004 to 2006, while among repeat visitors it was 2.5, also down from 2004 to 2006. The average number of visits among all visitors in the past five years was 10.4 (down from 2004 to 2005), while among repeat visitors it was 11.6 (also down from 2004 to 2005).

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2004	2005	2006	2007	2008
Proportion of visitors who were first-time visitors	16%	15%	15%	14%	12%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	77%	72%	58%	63%	58%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	4%	8%	18%	12%	14%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	65%	55%	47%	44%	33%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	21%	24%	36%	41%	51%
Average number of visits in past five years (all visitors)	11.5	11.5	10.5	10.2	10.4
Average number of visits in past five years (repeat visitors)	13.5	13.3	12.1	11.7	11.6
Average number of visits in past year (all visitors)	3.2	3.2	2.5	2.3	2.3
Average number of visits in past year (repeat visitors)	3.6	3.6	2.8	2.5	2.5

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (87%), though more arrived by air (14%) than in 2003 to 2005. Nine in ten visitors (91%) arrived in Laughlin directly from their permanent residences, up from 2004 to 2005. As in the past, most visitors decided where to stay in Laughlin before leaving home (95%). Nearly all visitors (94%) who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin, up significantly from 2004 to 2006. Three-quarters (75%) of visitors who saw shows decided what shows to see *before* arriving in Laughlin (up over all past years). Three percent (3%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2008 (down from 2006, but up from 2004 to 2005), while 8% said they used the Internet to plan their trip (down from 2004 to 2006). Thirteen percent (13%) of Laughlin visitors visited Las Vegas on their current trip to Laughlin, down from prior years. Eight percent (8%) toured other nearby places, up significantly from last year, but down significantly from 2004 and 2005.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2004	2005	2006	2007	2008
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/RV)	93%	93%	88%	87%	87%
Proportion of visitors who traveled to Laughlin by air	7%	7%	12%	13%	14%
Proportion of visitors who traveled to Laughlin from their permanent residence	75%	75%	89%	93%	91%
Proportion of visitors who decided where to stay in Laughlin before arrival	91%	92%	93%	93%	95%
Proportion of visitors who decided where to gamble in Laughlin before arrival	60%	64%	85%	93%	94%
Proportion of visitors who decided which shows to see in Laughlin before arrival	37%	34%	13%	52%	75%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	1%	2%	8%	5%	3%
Proportion of visitors who used the Internet in planning their trip to Laughlin	11%	11%	13%	7%	8%
Proportion of visitors who have visited Las Vegas in the past five years	81%	78%	74%	75%	71%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	18%	20%	20%	17%	13%
Proportion of visitors who toured nearby places	23%	22%	7%	2%	8%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.3, up from 2.0 in 2006 and 2.1 in 2007. Only 2% had people under the age of 21 in their immediate party, down from 7% in 2004 and 5% in 2005. Their stay averaged 3.0 nights and 4.0 days. Ninety-eight percent (98%) 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 $39.95 for their room, similar to last year, but up significantly from $34.62 in 2004. Fifteen percent (15%) of visitors who stayed in a hotel or motel paid a package/tour group rate, up from 2005, 2006, and 2007. The average package cost was $220.97. The average food and drink expenditures were $192.89 per trip, down from $208.22 in 2006, but up significantly from $142.71 in 2004, $180.85 in 2005, and 183.26 in 2007. The average local transportation expenditures were $29.46 per trip, up significantly from all prior years. The average total spent on shopping in 2008 was $32.53, down significantly from all prior years. An average of $3.01 was spent on shows (down from $5.18 in 2004), and an average of $0.01 was spent on sightseeing (a decrease from all prior years).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2004	2005	2006	2007	2008
Average number of adults in immediate party	2.3	2.4	2.0	2.1	2.3
Proportion of visitors with persons under 21 in their immediate party	7%	5%	3%	3%	2%
Proportion of visitors who stayed overnight	97%	98%	99%	100%	100%
Days stayed (average)	3.9	4.1	4.1	4.0	4.0
Nights stayed (average)	2.9	3.1	3.1	3.0	3.0
Proportion of visitors who stayed in a hotel or motel room	95%	96%	97%	99%	98%
Number of room occupants (average)	2.1	2.0	2.0	2.0	2.0
Lodging expenditures (average per night — non-package)	$34.62	$37.56	$40.89	$41.76	$39.95
Proportion of visitors who bought a package or travel group trip	14%	12%	12%	11%	15%
Average cost of package per person (among package/tour group visitors)	$183.40	$189.55	$223.80	$242.32	$220.97
Average trip expenditures for food and drink	$142.71	$180.85	$208.22	$183.26	$192.89
Average trip expenditures for local transport	$16.22	$9.16	$3.78	$0.86	$29.46
Average trip expenditures for shopping	$44.25	$48.57	$45.24	$40.53	$32.53
Average trip expenditures for shows	$5.18	$3.97	$2.78	$2.40	$3.01
Average trip expenditures for sightseeing	$2.09	$1.75	$0.97	$0.27	$0.01

GAMING BEHAVIOR AND BUDGETS

All visitors (100%) gambled while in Laughlin, an increase from 97% in both 2004 and 2005 . Those who gambled budgeted an average of $556.62, similar to 2004 and 2005 averages, but down significantly from $787.13 last year and $846.65 in 2006. Gamblers spent an average of 5.8 hours a day gambling, down from 6.2 in 2006, and gambled at an average of 1.6 casinos in 2008, a significant decrease from 2.4 casinos in 2004 and 2.5 casinos in 2005. Eight in ten gamblers (81%) played slot machines or video machines most often. Among these visitors, 38% played quarter machines most often (down from all prior years), while 37% played penny machines (up significantly over the past three years). The average number of coins or tokens per play was 23.9, up significantly from the all previous years. Fifteen percent (15%) played table games most often; among these visitors, 66% typically played a $5.00 minimum (up from 2004 to 2006), with an average bet of $10.38, up significantly from $4.85 last year and $7.47 in 2006.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2004	2005	2006	2007	2008
Proportion who gambled while visiting Laughlin	97%	97%	99%	99.8%	100%
Average trip gambling budget (among those who gambled)	$533.03	$559.35	$846.65	$787.13	$556.62
Average hours per day spent gambling (among those who gambled)	5.8	5.6	6.2	5.9	5.8
Average number of different casinos gambled (among those who gambled)	2.4	2.5	1.4	1.5	1.6
Proportion who played slot/video machines most often (among those who gambled)	77%	79%	81%	77%	81%
Proportion who played quarter machines most often (among those who played machines)	56%	54%	51%	45%	38%
Proportion who played penny machines most often (among those who played machines)	NOT ASKED	NOT ASKED	17%	29%	37%
Average number of coins/tokens per play (among those who played machines)	6.0	7.6	10.4	16.8	23.9
Proportion who played table games most often (among those who gambled)	18%	18%	16%	17%	15%
Proportion who played $5.00 table minimums most often (among those who played table games)	54%	56%	55%	70%	66%
Average bet (among those who played table games)	$14.00	$12.21	$7.47	$4.85	$10.37

ATTITUDINAL INFORMATION

The vast majority (96%) of visitors reported that they were "very satisfied" with their trip to Laughlin, up from 94% in 2004.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2004	2005	2006	2007	2008
Proportion who were "very satisfied" with their current trip to Laughlin	94%	95%	96%	97%	96%

VISITOR DEMOGRAPHICS

Three-quarters (78%) of visitors were married. Three in ten visitors were from Southern California (30%, down significantly from 39% in 2004), and 4% were foreign visitors (down from 7% in 2006 and 6% in 2007). Forty-four percent (44%) were 65 or older. Visitors are still more likely to be retired (52%, down significantly from 59% in both 2004 and 2005) than employed (45%, up from 38% in 2004 and 35% in 2005). The largest proportion of visitors have a high school diploma or less (45%, up from 39% in 2005 and 40% in 2004). More than one-half (51%) have a household income of less than $60,000, while 48% have incomes of $60,000 or more (up from 35% in both 2004 and 2005).

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2004	2005	2006	2007	2008
Proportion of visitors who were married	77%	77%	76%	78%	78%
Proportion of visitors who were from the Southern California	39%	34%	31%	30%	30%
Proportion of visitors who were foreign	4%	4%	7%	6%	4%
Proportion of visitors who were 50 years old or older	79%	82%	79%	81%	81%
Proportion of visitors 65 years old or older	45%	44%	44%	44%	44%
Average age	60.4	60.9	60.3	60.9	60.8
Proportion of visitors who were retired	59%	59%	53%	54%	52%
Proportion of visitors who were employed	38%	35%	45%	43%	45%
Proportion of visitors with a high school diploma or less	40%	39%	44%	44%	45%
Proportion of visitors with a household income less than $60,000	49%	42%	49%	56%	51%

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, 2004 and December 31, 2008 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2004	2005	2006	2007	2008
Days stayed (average)	3.9	4.1	4.1	4.0	4.0
Nights stayed (average)	2.9	3.1	3.1	3.0	3.0
Proportion of visitors who stayed overnight	97%	98%	99%	100%	100%
Proportion of visitors who stayed in a hotel or motel room	95%	96%	97%	99%	98%
Lodging expenditures (average per night — non-package)	$34.62	$37.56	$40.89	$41.76	$39.95
Proportion of visitors who bought a package or travel group trip	14%	12%	12%	11%	15%
Average cost of package per person (among package/tour group visitors)	$183.40	$189.55	$223.80	$242.32	$220.97
Number of room occupants (average — hotel/motel only)	2.1	2.0	2.0	2.0	2.0
Average trip expenditures for food and drink	$142.71	$180.85	$208.22	$183.26	$192.89
Average trip expenditures for local transportation	$16.22	$9.16	$3.78	$0.86	$29.46
Average trip expenditures for shopping	$44.25	$48.57	$45.24	$40.53	$32.53
Average trip expenditures for shows	$5.18	$3.97	$2.78	$2.40	$3.01
Average trip expenditures for sightseeing	$2.09	$1.75	$0.97	$0.27	$0.01
Proportion who gambled while visiting Laughlin	97%	97%	99.5%	99.8%	100%
Average trip gambling budget (among those who gambled)	$533.03	$559.35	$846.65	$787.13	$556.62

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 2008. 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 2008 study and compares them to the results of the 2004, 2005, 2006 and 2007 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, 88% of visitors said they had visited Laughlin more than once, and 12% were first-time visitors (Figure 1). There are significantly fewer first-time visitors – and significantly more repeat visitors – in 2008 than in 2004 through 2006.

FIGURE 1
First Visit Vs. Repeat Visit

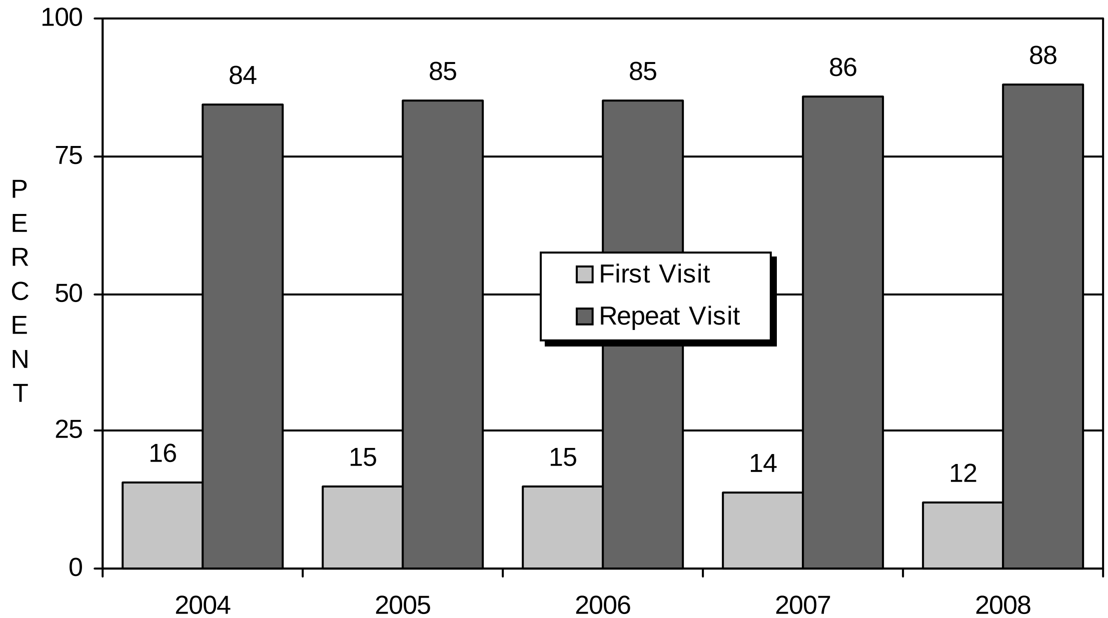
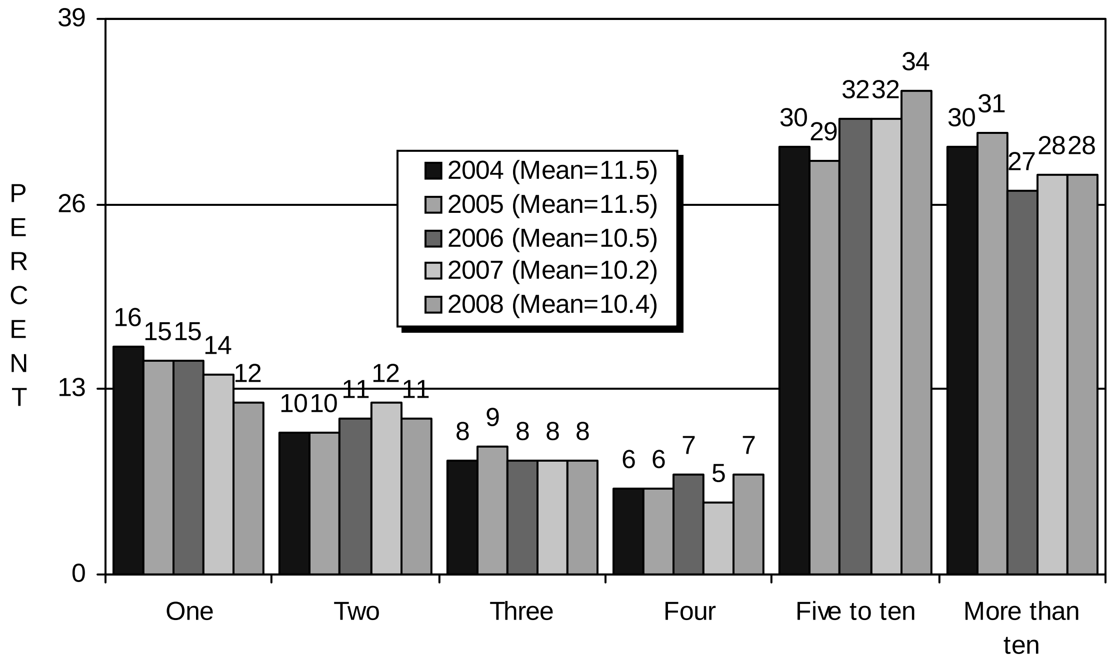
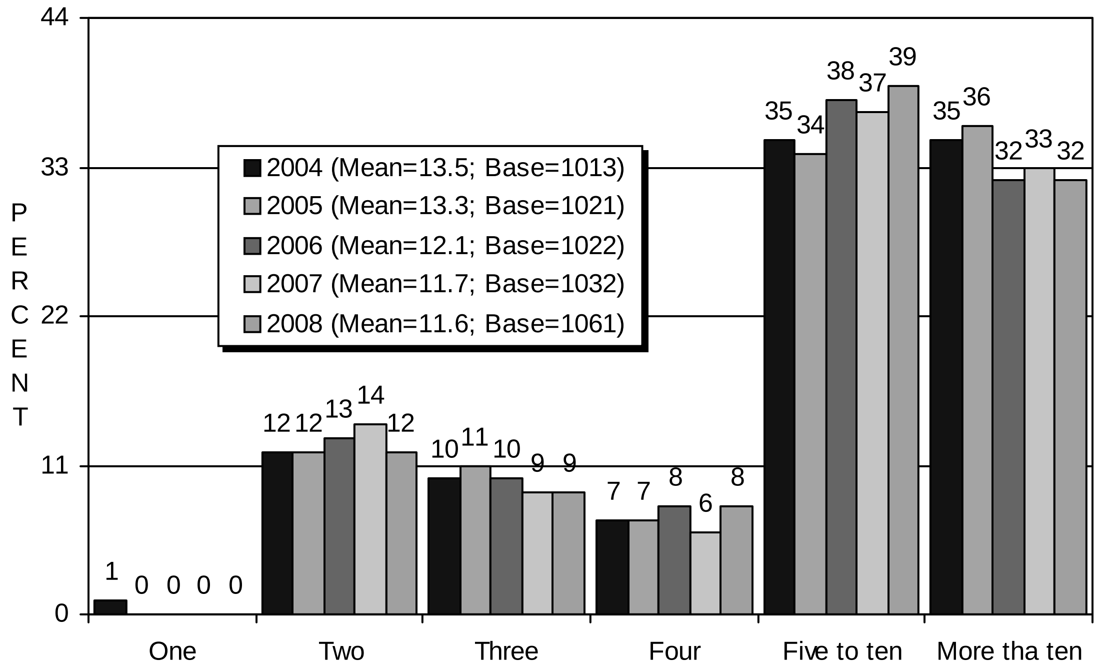


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



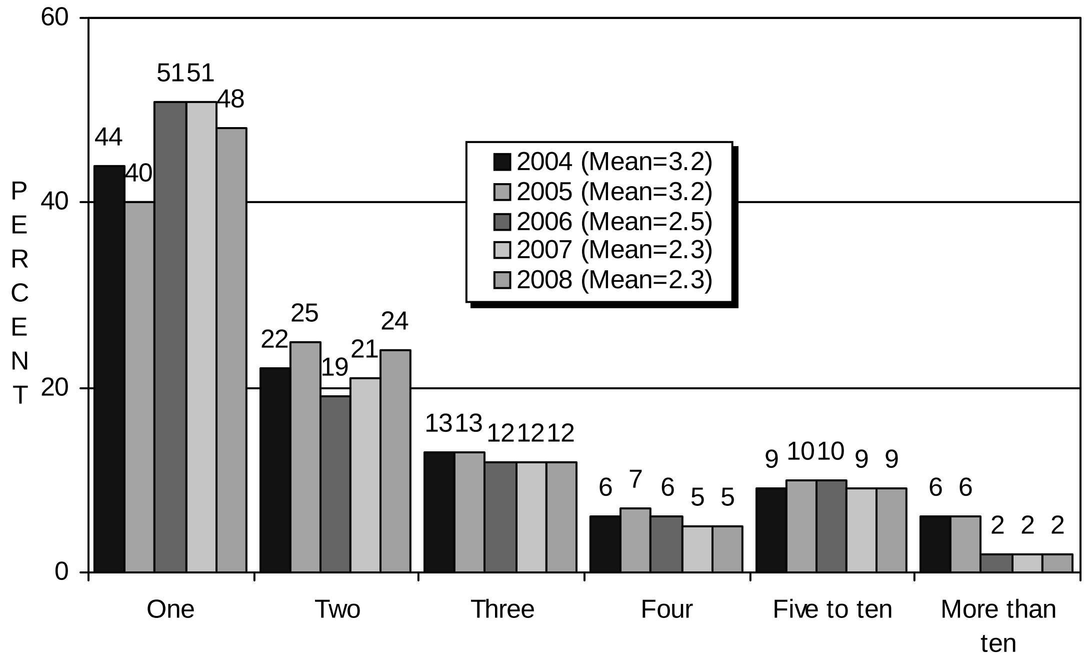
The average number of visits to Laughlin in the past five years *among all visitors* was 10.4 in this year's survey, down significantly from 11.5 in both 2004 and 2005 (Figure 2). The proportion of visitors saying they visited Laughlin five to ten times over the past five years stands at 34%, up significantly 30% in 2004 and 29% in 2005. At the same time, the proportion of visitors who said they visited only once stands at 12%, significantly lower than in 2004 (16%) or 2005 and 2006 (15%).

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



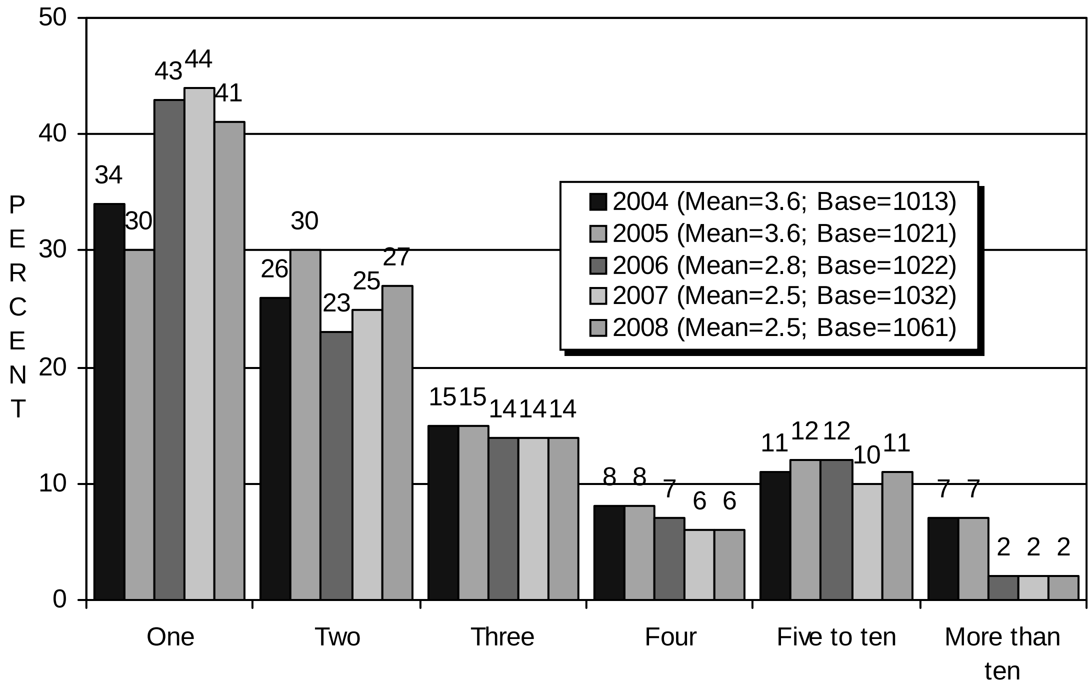
The average number of visits to Laughlin during the past five years *among repeat visitors* was 11.6, down significantly from 13.5 in 2004 and 13.3 in 2005 (Figure 3).

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



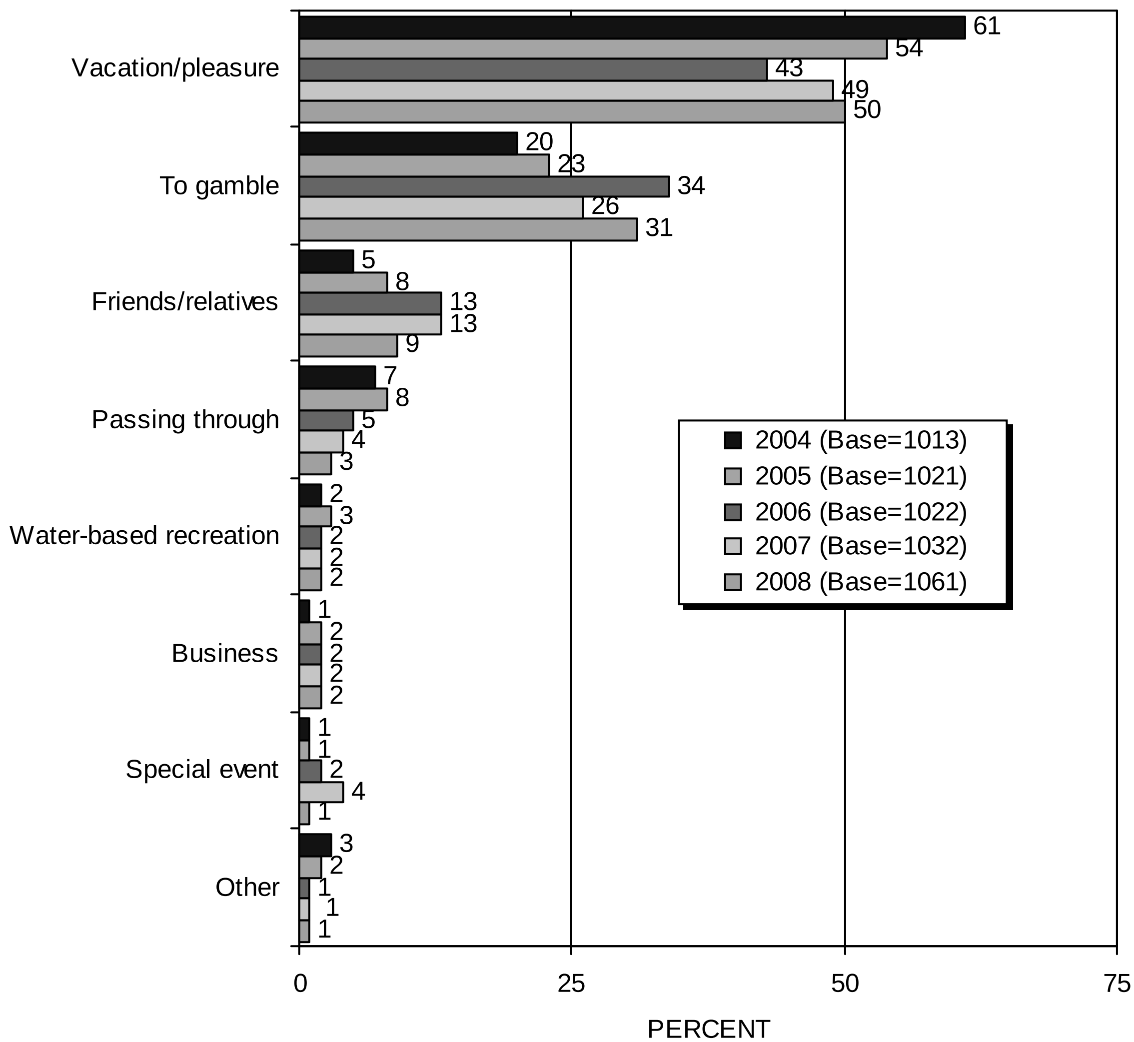
Among *all visitors*, the average number of visits in the past year was 2.3 times, down significantly from 3.2 in both 2004 and 2005 (Figure 4). Forty-eight percent (48%) reported visiting Laughlin only once in the past year, up from 44% in 2004 and 40% in 2005. Conversely, only 2% reported visiting Laughlin more than ten times in the past year, down from 6% in 2004 and 2005.

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



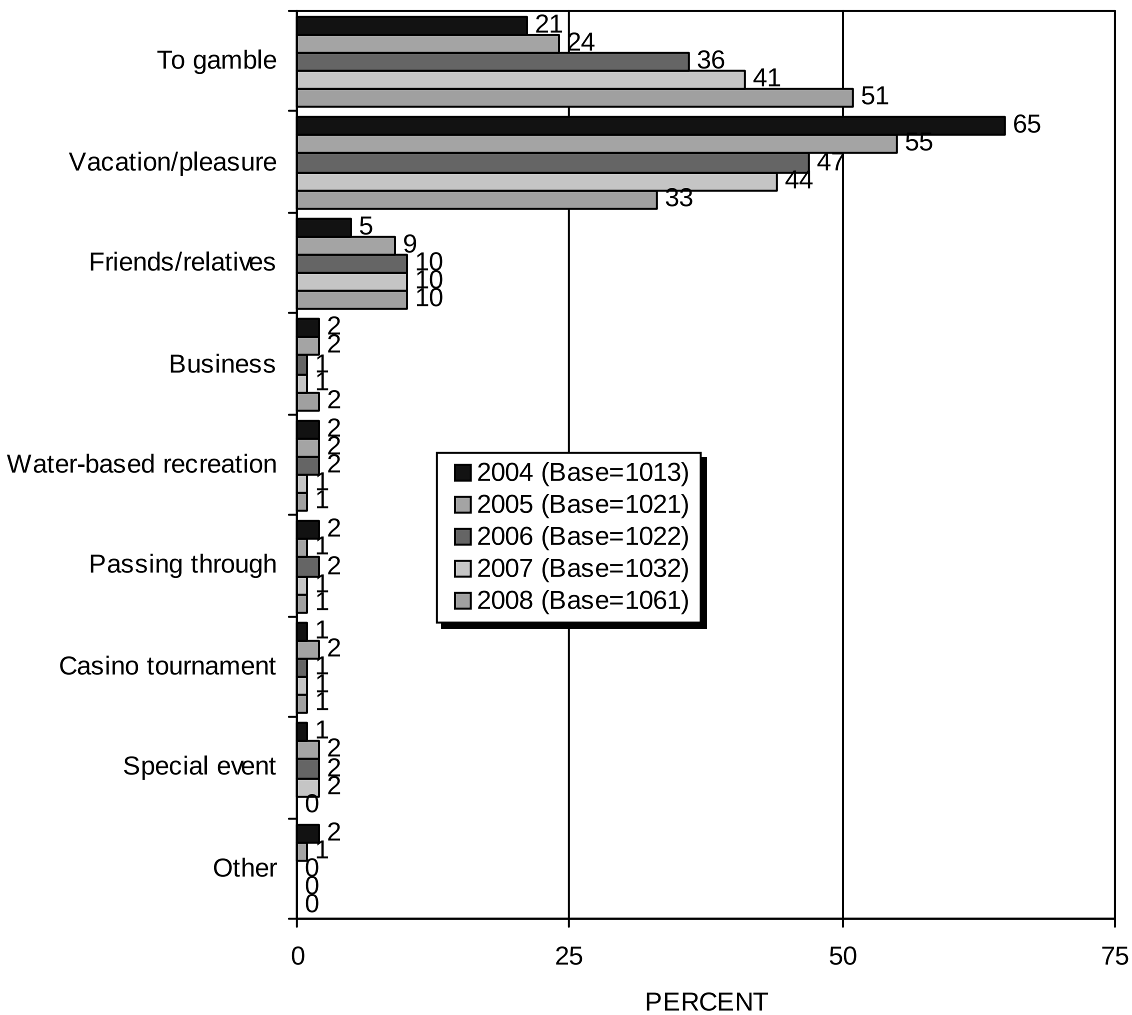
During the past year, repeat visitors averaged 2.5 trips to Laughlin, down significantly from 3.6 in both 2004 and 2005 (Figure 5). Among repeat visitors 41% reported visiting just once in the past year, up from 34% in 2004 and 30% in 2005, while 2% reported visiting ten or more times in the past year, down from 7% in 2004 and 2005.

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



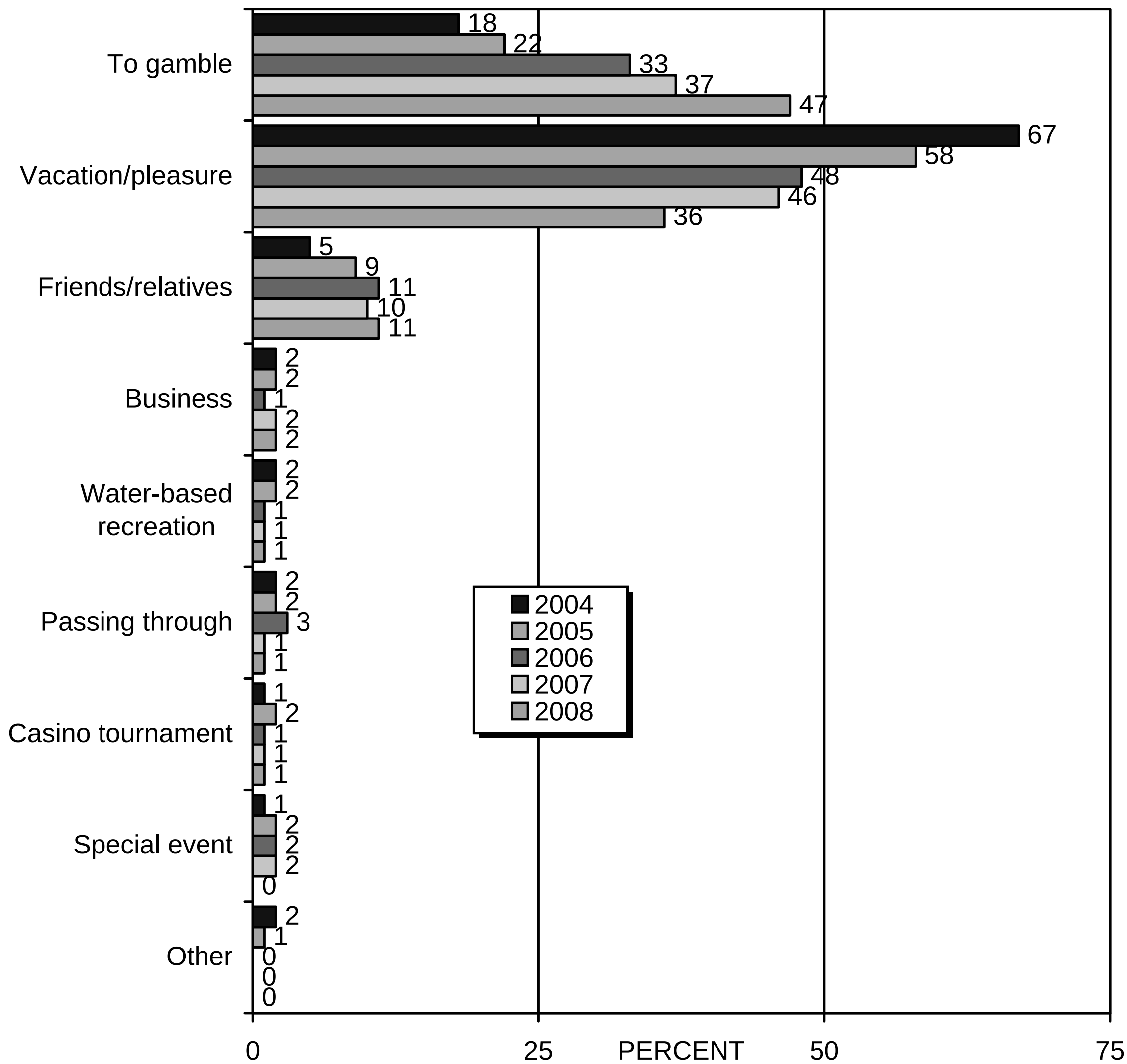
One-half (50%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure, a significant increase from 43% in 2006, but a significant decrease from 61% in 2004, and 54% in 2005 (Figure 6). Three in ten repeat visitors (31%) said they first came to Laughlin for gambling, up significantly from 20% in 2004, 23% in 2005 and 26% in 2007. Nine percent (9%) first came to Laughlin to visit family or friends, up significantly from 5% in 2004, but down from 13% in 2006 and 2007. One percent (1%) first came to Laughlin for a special event, down significantly from 4% last year. Three percent (3%) said they were just passing through Laughlin, down from 7% in 2004, 8% in 2005, and 5% in 2006.

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 (33%) was down significantly from all prior years (Figure 7). The proportion who said they came to gamble was 51%, up significantly from all prior years. Ten percent (10%) said they came to visit friends or family, (the same as in the past three years, but up significantly from 5% in 2004).

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



As with repeat visitors, the proportion of *all visitors* in 2008 who reported that the primary purpose for their current visit to Laughlin was vacation or pleasure (36%) was down significantly from all previous years (Figure 8). The proportion of all visitors who said gambling was the primary reason for their current visit (47%) was up significantly from all previous years. Eleven percent (11%) said they came to visit friends or relatives (similar to most prior years, but up significantly from 5% in 2004).

FIGURE 9
Primary Purpose Of First Visit Vs. Current Visit — 2008
(Among Repeat Visitors)

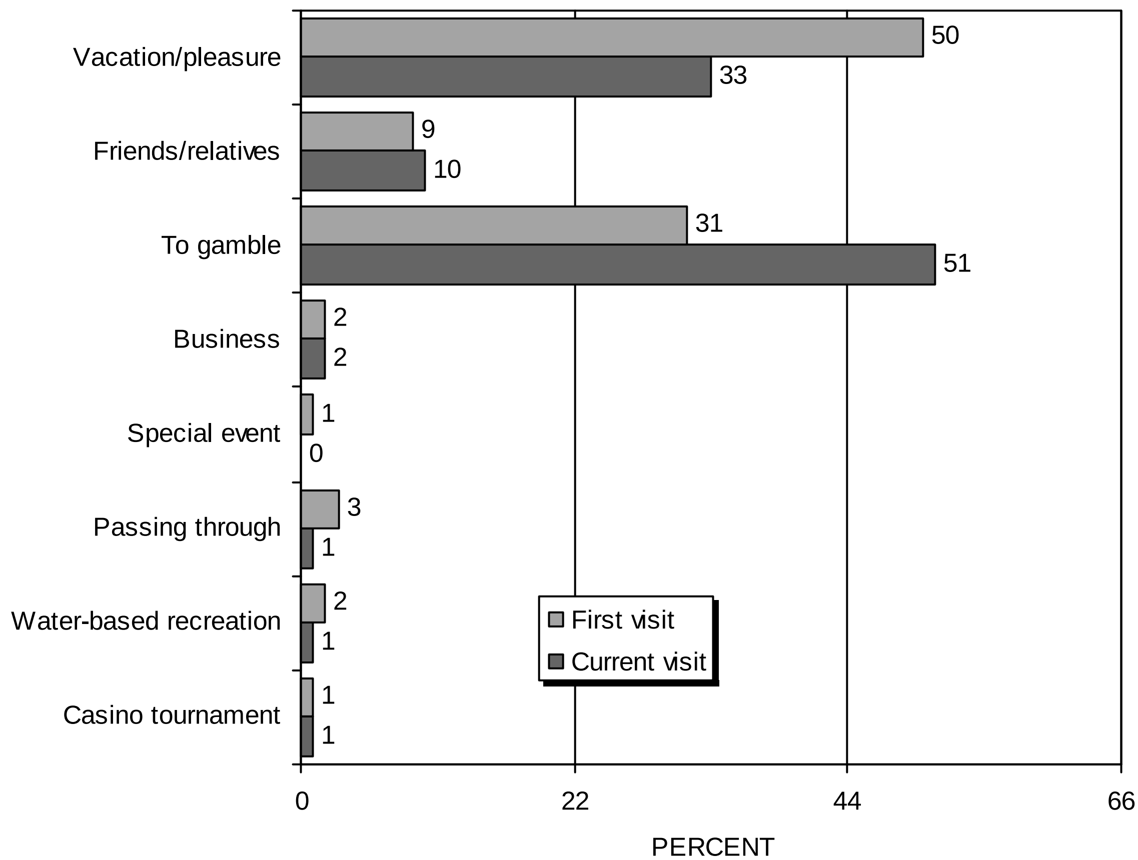


Figure 9 compares the reasons given by *repeat visitors* for their first Laughlin visit versus their current visit in 2008. A significantly higher proportion of repeat visitors said the purpose of their first trip was vacation or pleasure (50% vs. 33%). Repeat visitors were significantly more likely to say the purpose of their current visit was gaming (51% vs. 31%).

FIGURE 10
Primary Purpose Of Current Visit — 2008
(First-Time Vs. Repeat Visitors)

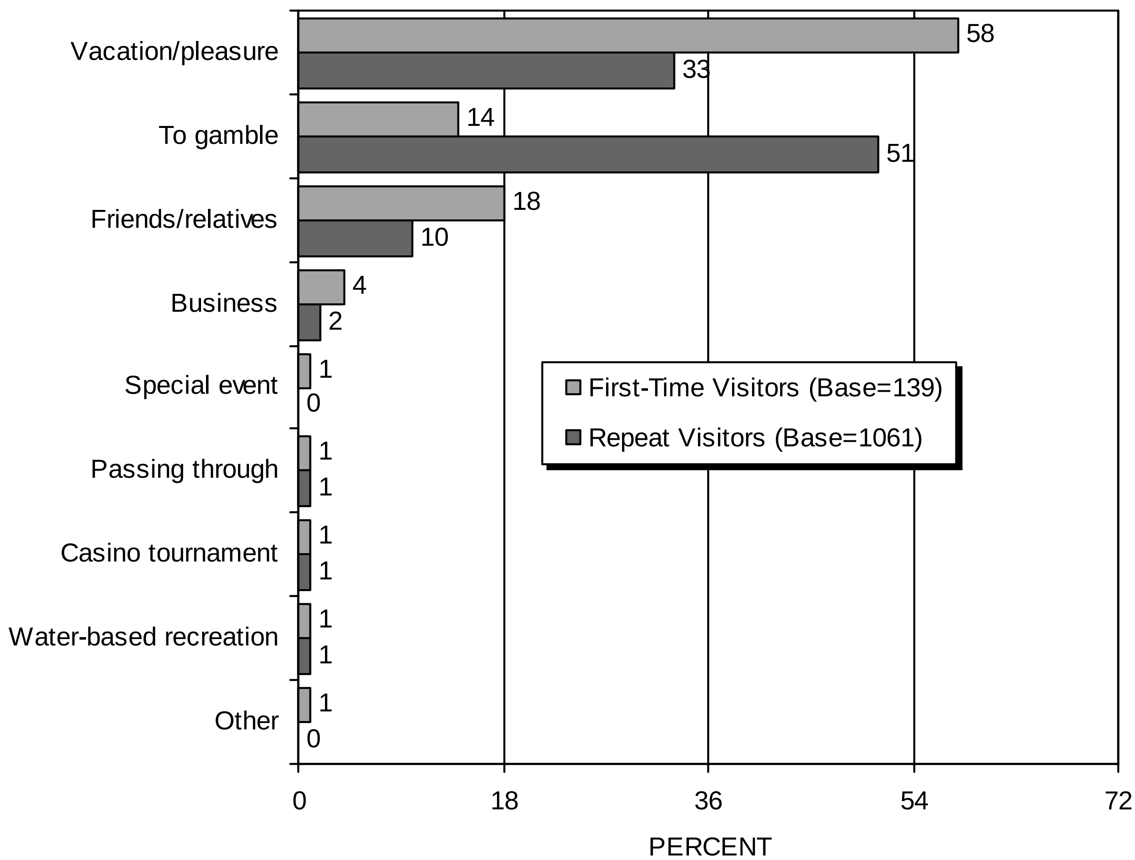
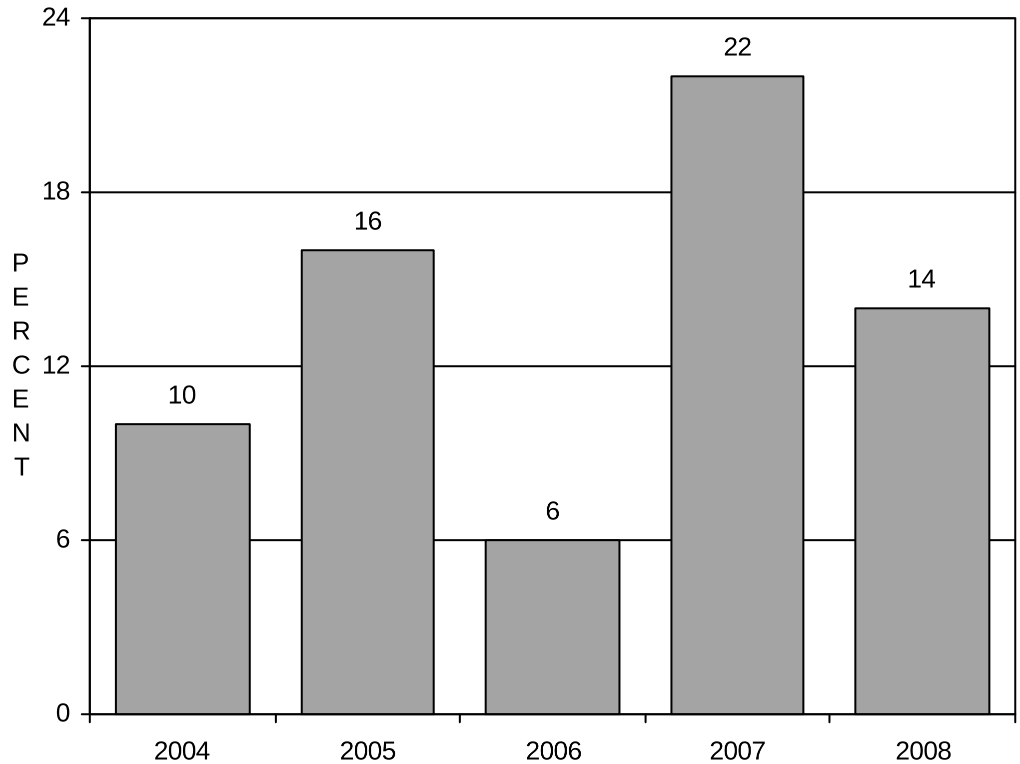


Figure 10 compares *first-time visitors* with *repeat visitors* in terms of purpose of their *current* visit to Laughlin in 2008. First-time visitors (58%) were significantly more likely than repeat visitors (33%) to say their current visit to Laughlin was for vacation or pleasure, or to visit friends and relatives (18% vs. 10%). Repeat visitors (51%) were significantly more likely than first-time visitors (14%) to report visiting Laughlin primarily to gamble.

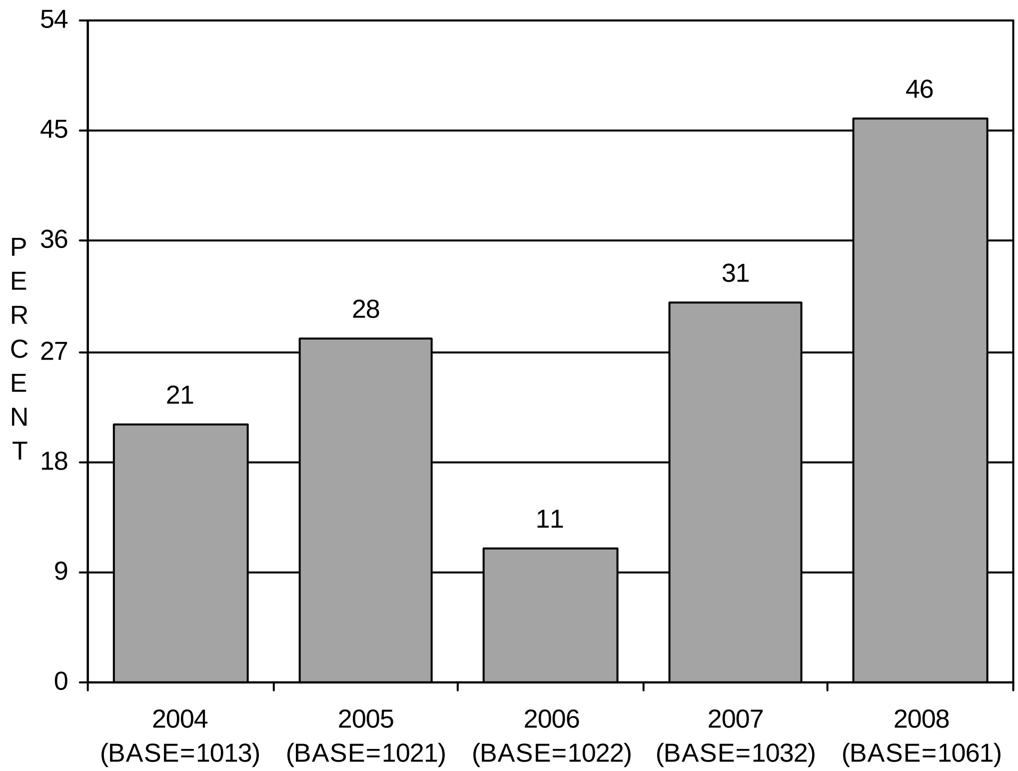
FIGURE 11
Gaming Tournaments*



We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). About one in seven visitors (14%) said they planned to participate in a gaming tournament, up significantly from 2004 (10%) and 2006 (6%), but down significantly from 2007 (22%).

* 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). Forty-six percent (46%) said they had, up significantly from all prior years.

* 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%) was the same as last year, but up significantly from 2004 (53%), 2005 (49%), and 2006 (51%). The percentage of visitors planning more than 30 days in advance stands at 26%, about the same as last year, but down significantly from 2004 (32%) and 2005 (38%).

FIGURE 13
Advance Travel Planning

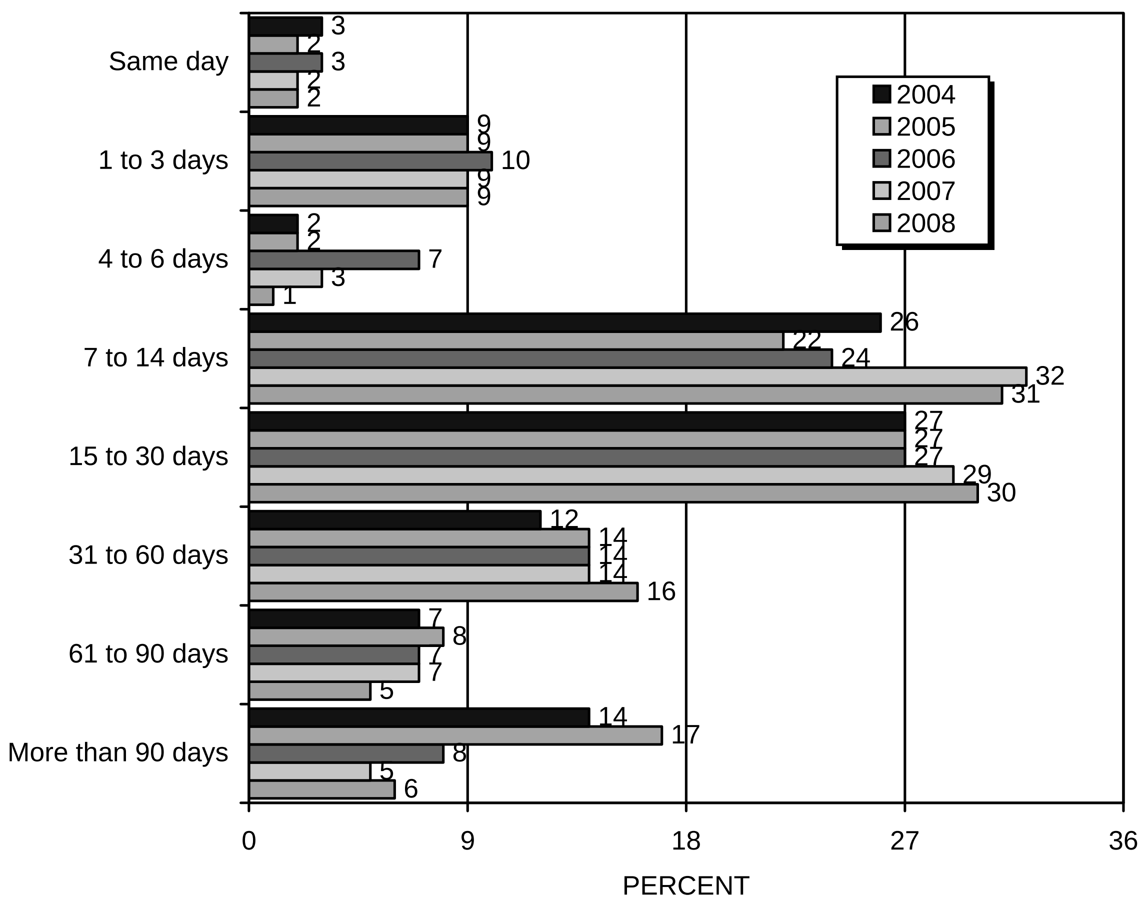
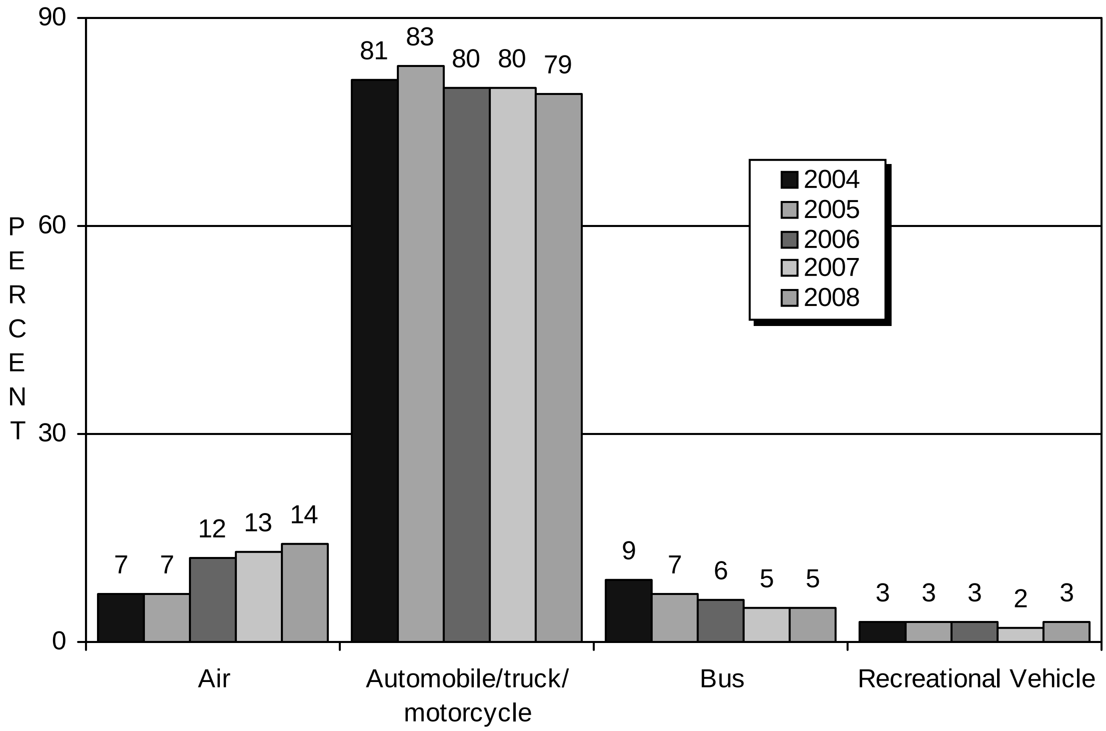
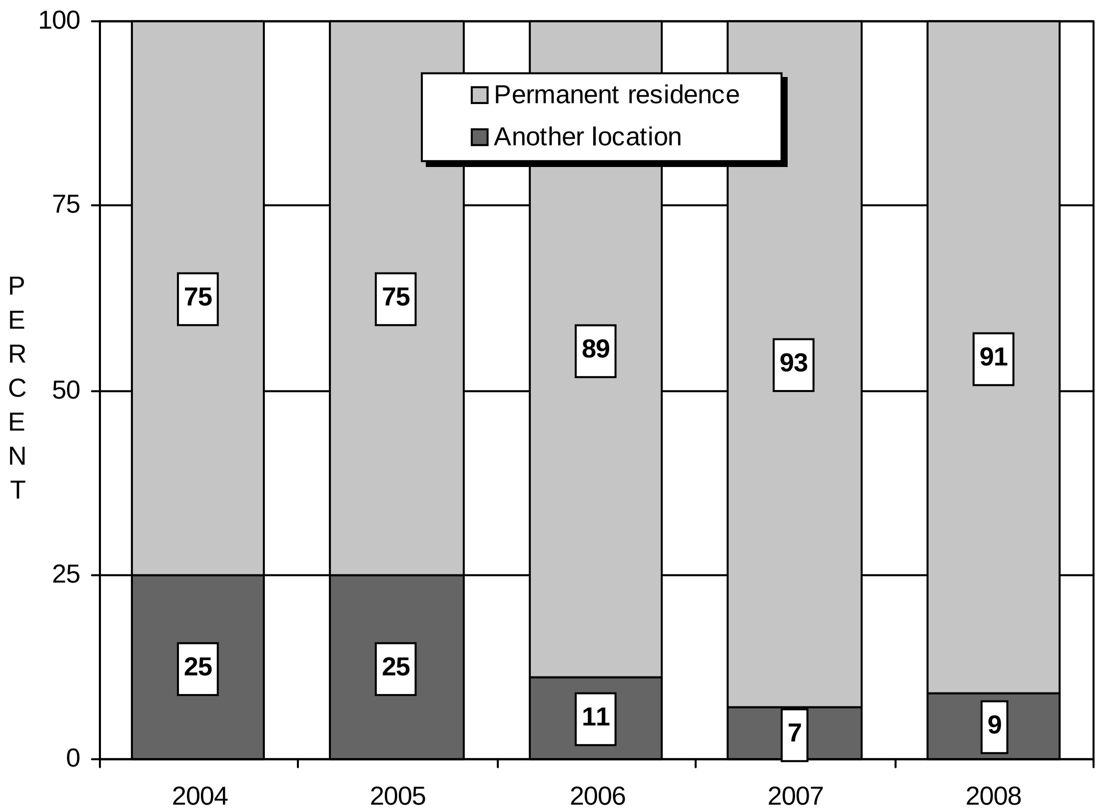


FIGURE 14
Transportation To Laughlin



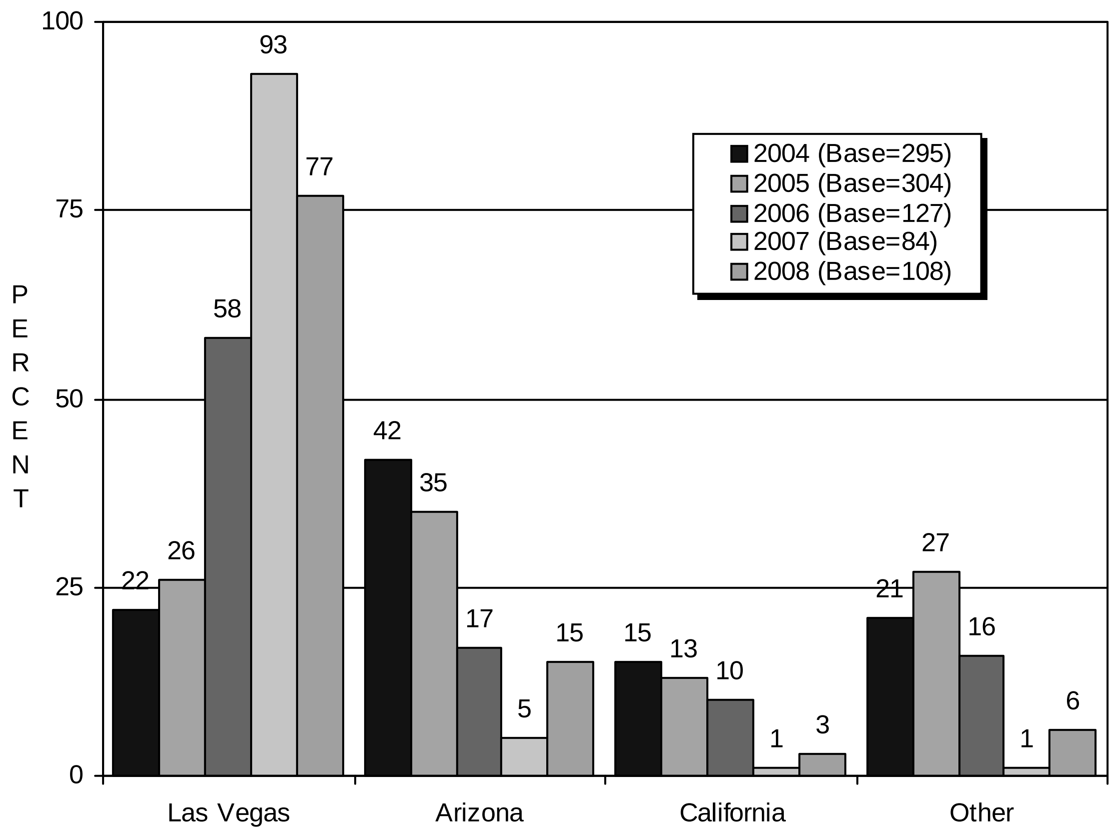
As in past years, most visitors traveled to Laughlin by automobile, truck, or motorcycle (79%) (Figure 14). Five percent (5%) traveled by bus, down significantly from 9% in 2004, 14% said they came by air (up from 7% each in 2004 and 2005), and 3% came in an RV.

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



In 2008, more than nine in ten visitors (91%) arrived in Laughlin directly from their permanent residences, up significantly from 2004 and 2005 (75%) (Figure 15).

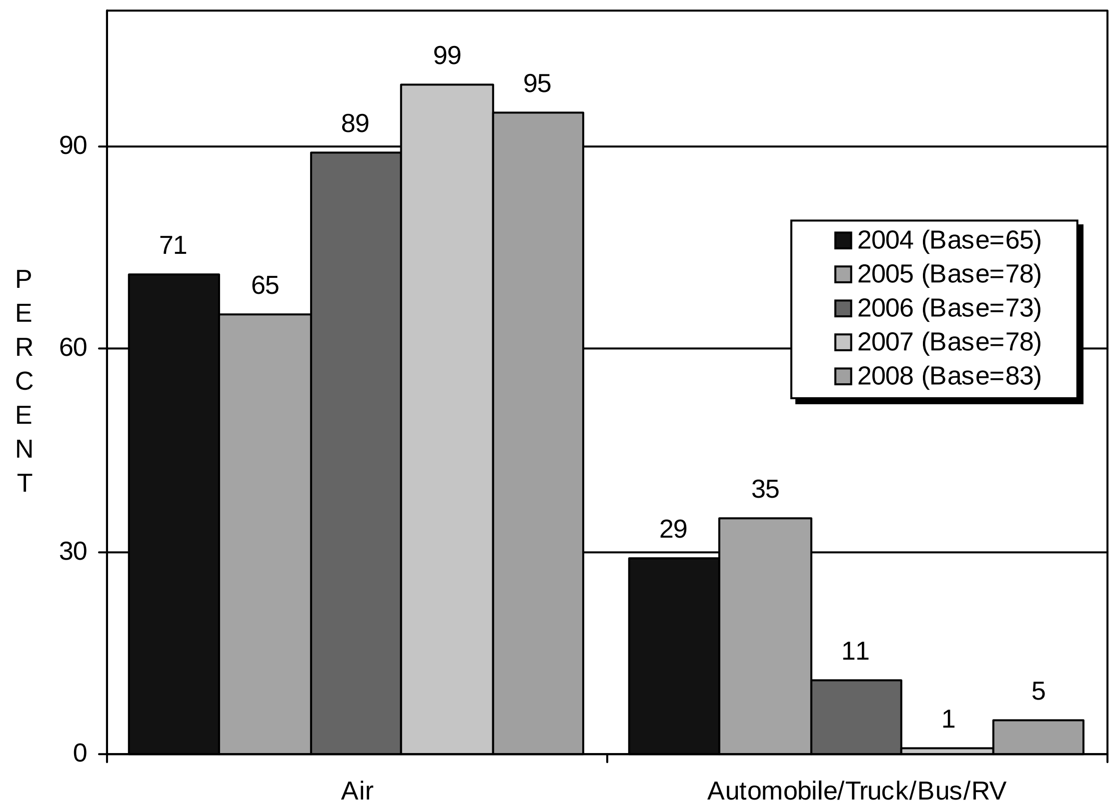
FIGURE 16
Where Visitors Came From
(Among Those Who Did Not Come To Laughlin Directly From Their Permanent Residence)



Among those who came to Laughlin after visiting another location (Figure 16), 77% came from Las Vegas, a significant increase from 2004 (22%), 2005 (26%) and 2006 (58%), but a significant decrease from 2007 (93%).

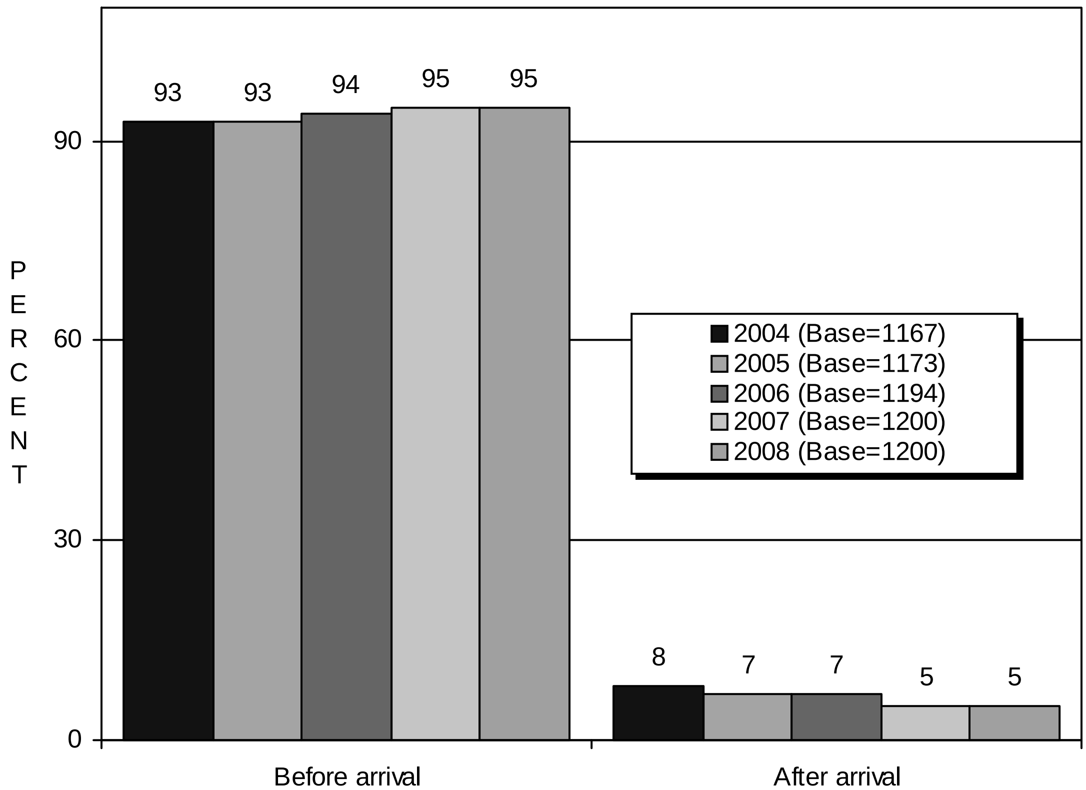
Fifteen percent (15%) came from Arizona, down from 42% in 2004 and 35% in 2005, but up from 5% in 2007. Three percent (3%) came from California, down from 15% in 2004, 13% in 2005, and 10% in 2006. Six percent (6%) came from some other location, down from 21% in 2004, 27% in 2005, and 16% in 2006.

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



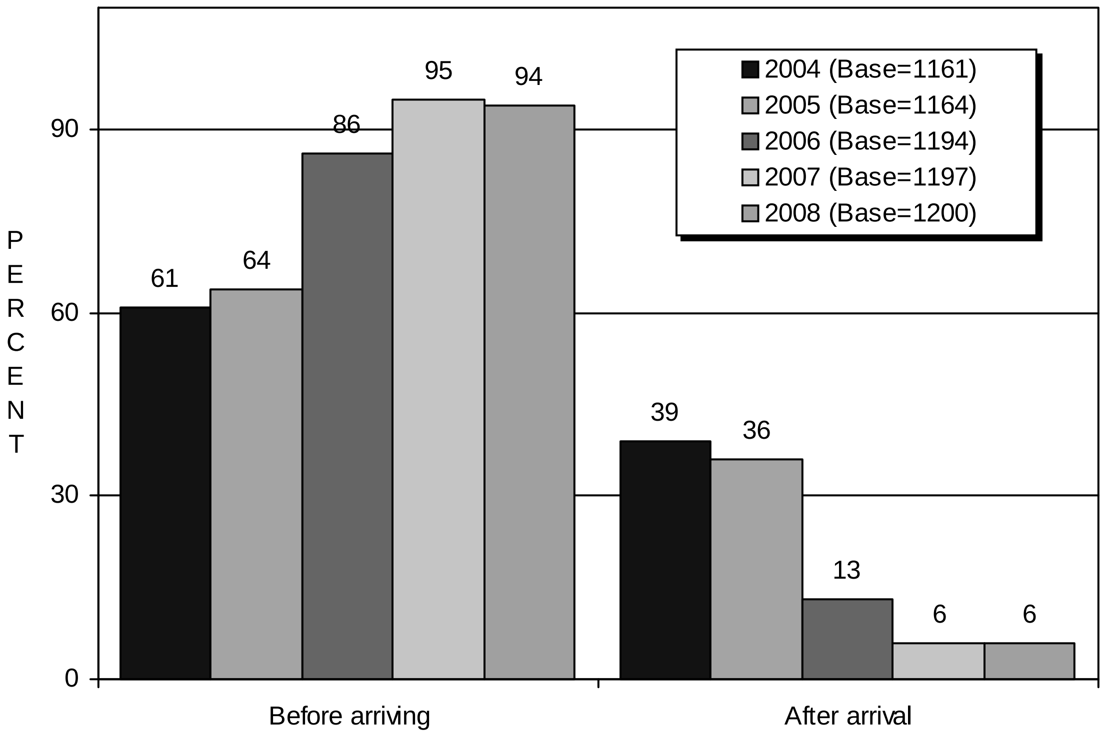
We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Nearly all (95%) arrived by air (a significant increase from 2004 and 2005), and only 5% arrived by ground transportation (a decrease from 2004 and 2005).

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



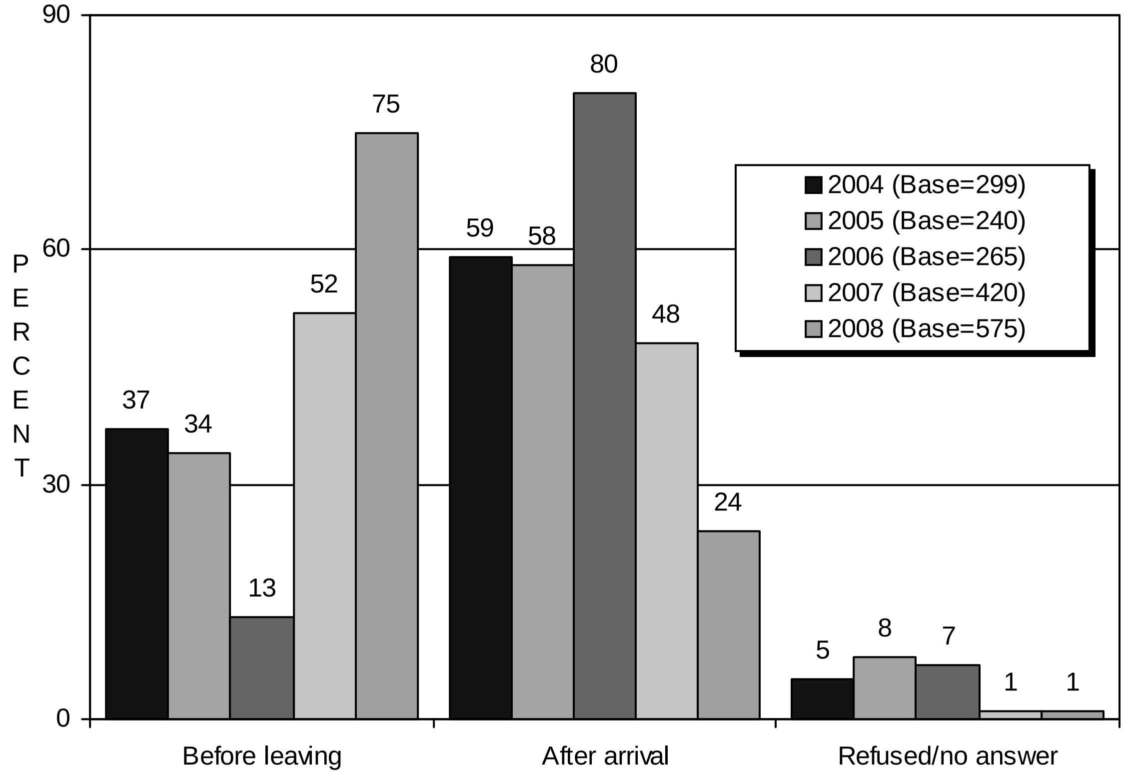
In 2008, most visitors decided where to stay in Laughlin prior to their visits (95%, up from 93% in 2004 and 2005), while 5% decided after arrival (Figure 18).

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



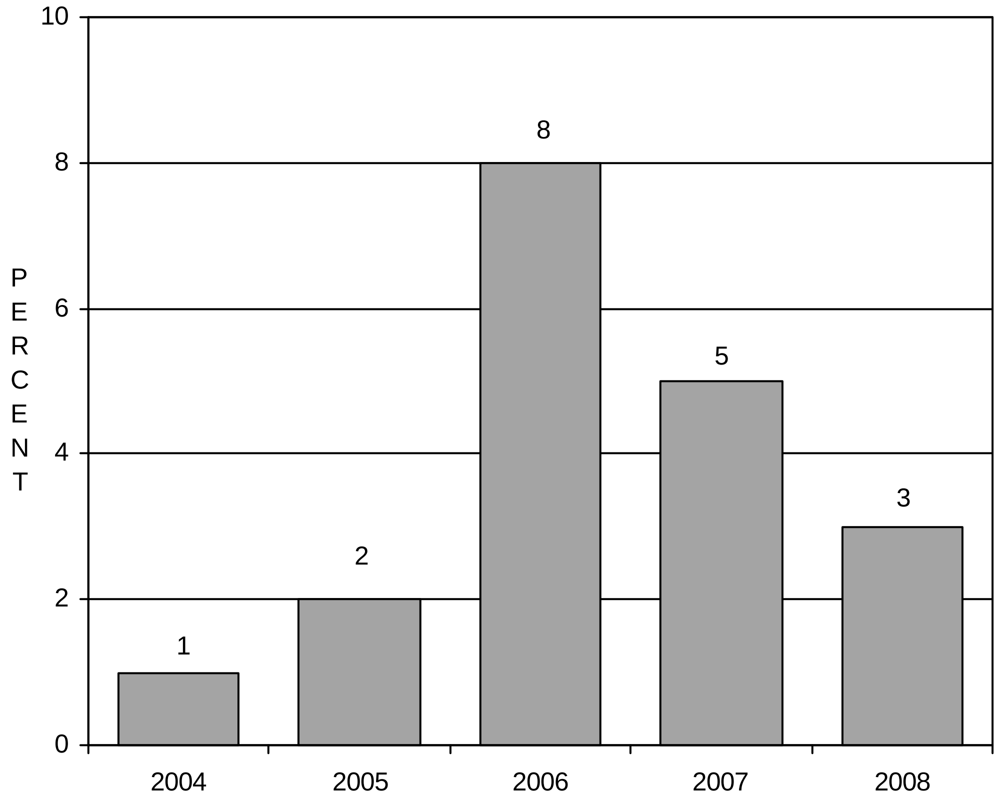
Ninety-four percent (94%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (Figure 19), up significantly from 2004 (61%), 2005 (64%), and 2006 (86%). Six percent (6%) reported making their decision about where to gamble after they arrived.

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



Among visitors who reported going to see a show, 75% decided what shows to see before arriving in Laughlin, up significantly from all previous years (Figure 20).

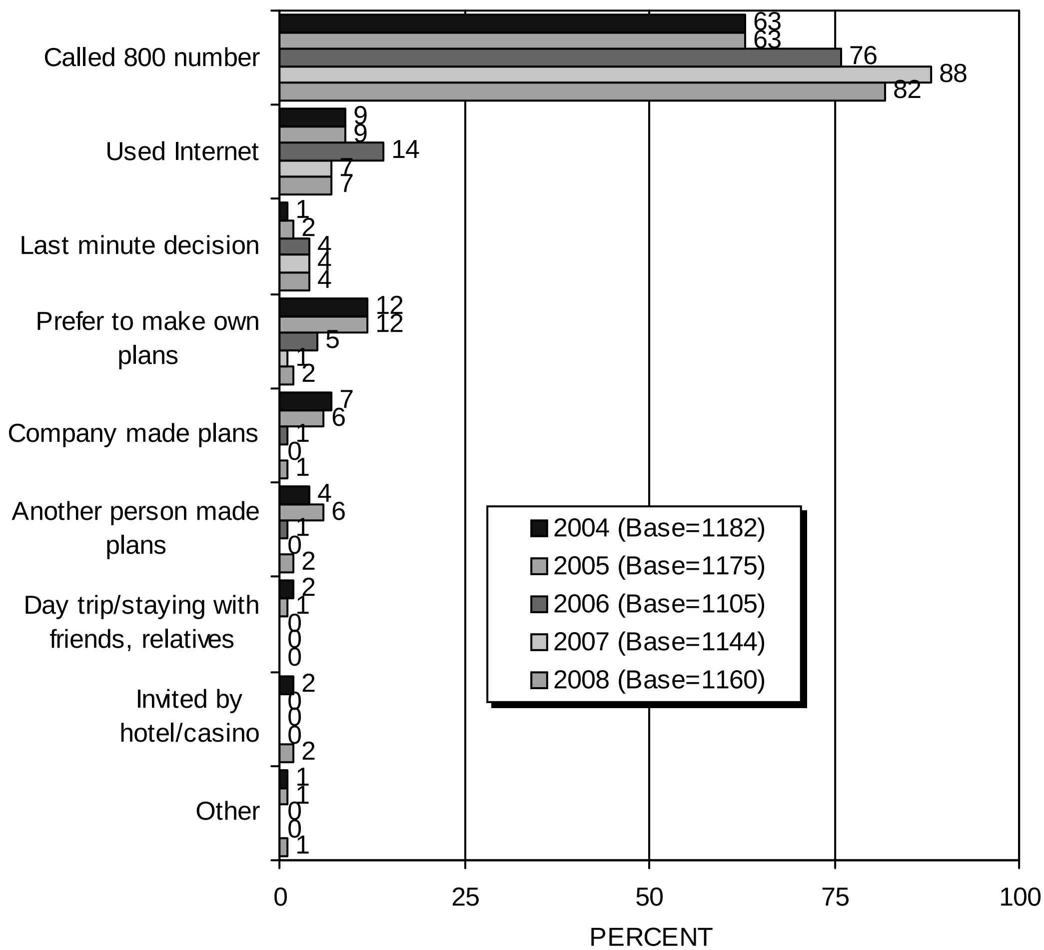
FIGURE 21
Travel Agent Assistance*
(Among All Visitors)



Three percent (3%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2008, a significant increase from 1% in 2004, but a significant decrease from 8% in 2006 (Figure 21).

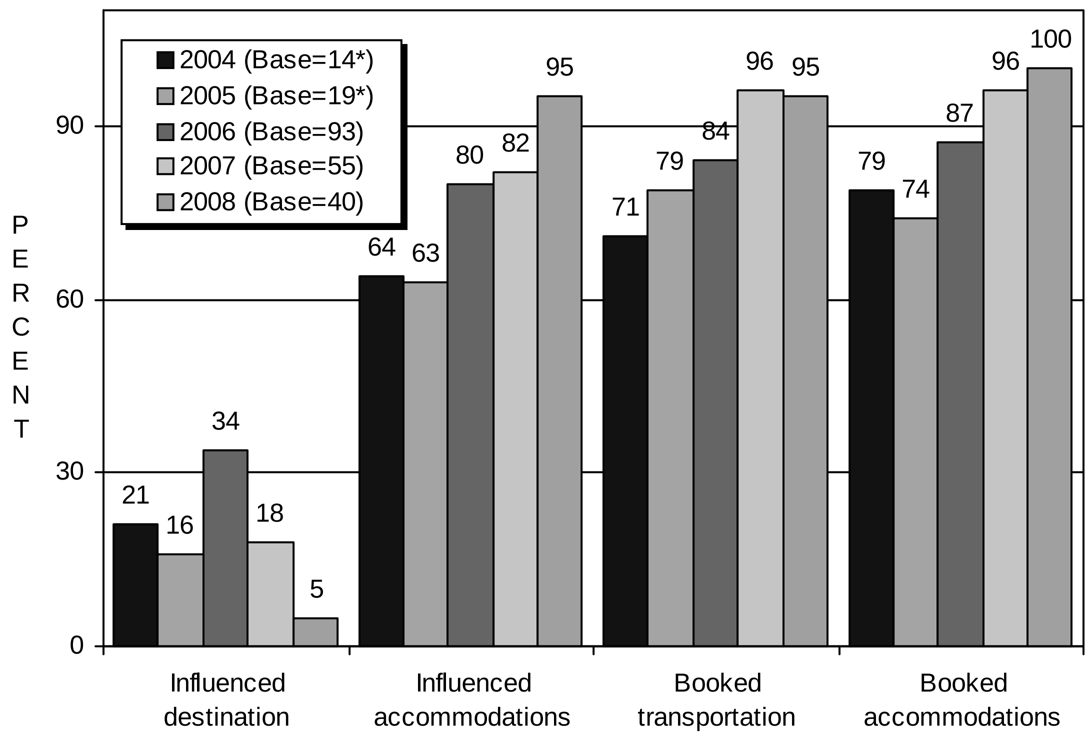
* Only "yes" responses are reported in this chart.

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-two percent (82%) said it was because they used an 800 number, up from 63% in 2004 and 2005, but down from 88% in 2007. Seven percent (7%) said they used the Internet to make their travel arrangements, down significantly from 14% in 2006. Four percent (4%) said it was a last minute decision and there was no time to call a travel agent, the same as the last two years, but up from 1% in 2004 and 2% in 2005. Only 2% said they preferred to make their own plans, down from 12% in 2004 and 2005 and 5% in 2006.

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



Among visitors who reported using a travel agent (Figure 23), virtually all (100%) had travel agents help them book their accommodations (up significantly from 2006), and nearly all (95%) had help with booking their transportation (up significantly from 2006). Nearly all (95%) said a travel agent influenced their choice of accommodations (up significantly from all prior years).

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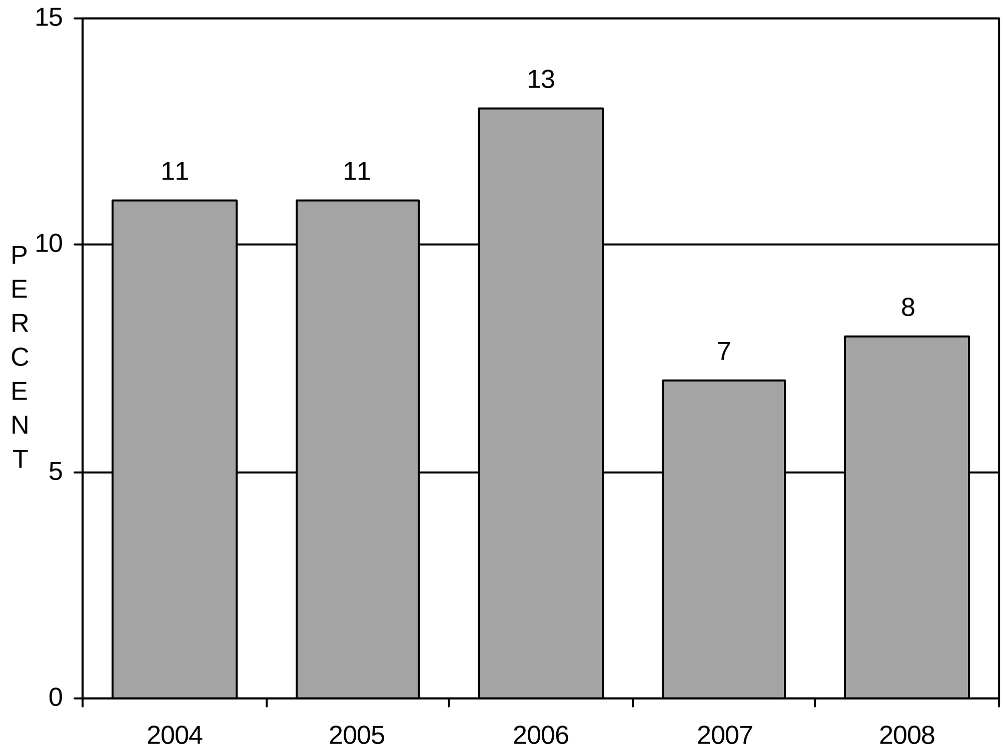
* Base sizes in 2004 and 2005 are too small to allow reliable statistical comparisons with other years.

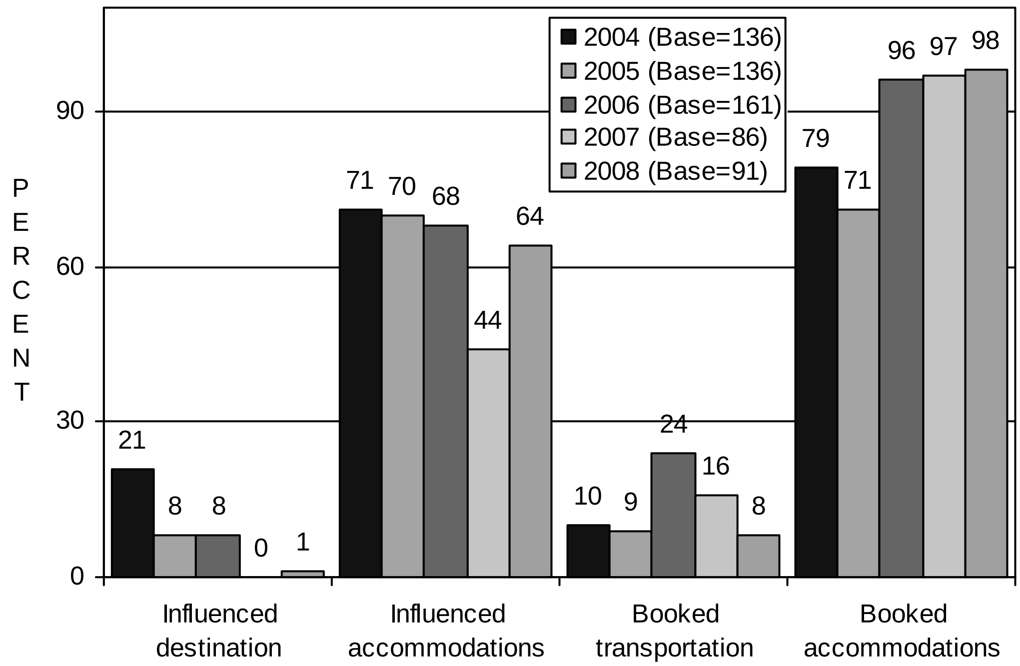
FIGURE 24
Whether Used Internet To Plan Trip*



Only 8% of visitors said they used the Internet to plan their trip to Laughlin, down from 2004 to 2006 (Figure 24).

* Only “yes” responses are shown in this figure.

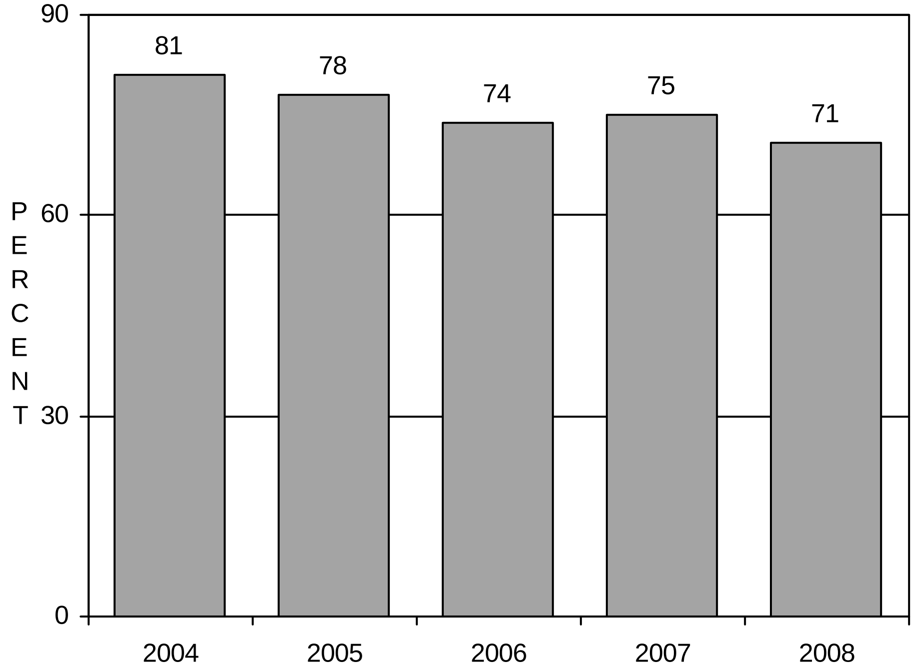
FIGURE 25
Internet Influence And Use*
(Among Those Who Used Internet To Plan Trip)



Among visitors who used the Internet to plan their trip, almost all (98%) booked their accommodations online, similar to the last two years, but a significant increase from 79% in 2004 and 71% in 2005 (Figure 25). About two-thirds (64%) said the Internet influenced their choice of accommodations, up significantly from 2007 but similar to all prior years. Eight percent (8%) said they booked transportation to Laughlin through the Internet, a decrease from 24% in 2006.

* Only "yes" responses are shown in this figure.

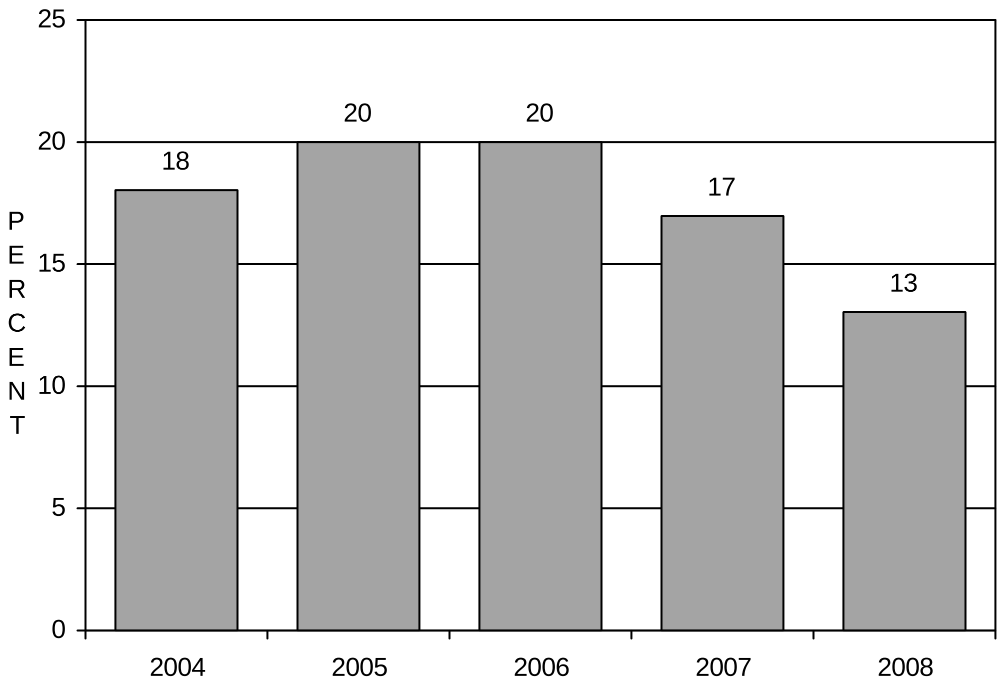
FIGURE 26
Whether Visited Las Vegas During Past Five Years*



Seven in ten Laughlin visitors (71%) said they have visited Las Vegas in the past five years, down from 81% in 2004 and 78% in 2005 (Figure 26).

* Only “yes” responses are reported in this chart.

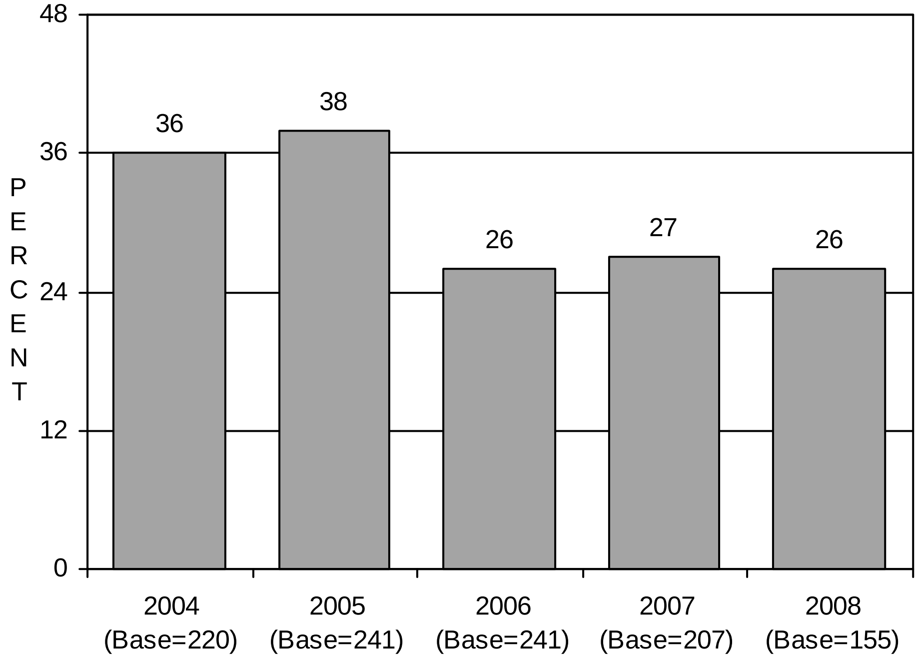
FIGURE 27
Visiting Las Vegas
On This Trip To Laughlin*



One in eight Laughlin visitors (13%) said they had visited or were planning to visit Las Vegas on this trip – the lowest number in the past five years (Figure 27).

* Only “yes” responses are reported in this chart.

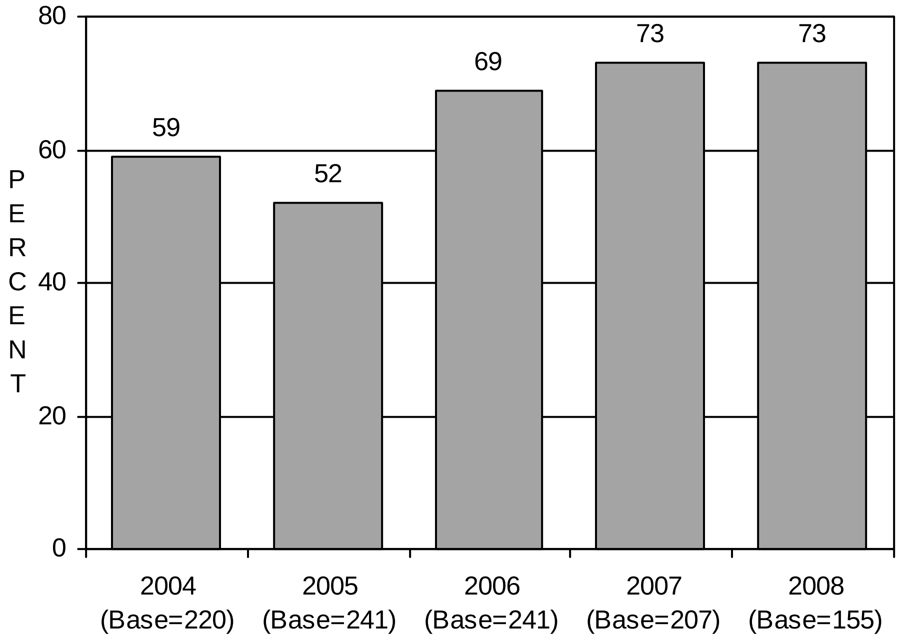
FIGURE 28
Visiting Downtown Las Vegas*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, 26% said they had visited or intended to visit Downtown, about the same as last year, but down significantly from 36% in 2004 and 38% in 2005 (Figure 28).

* Only “yes” responses are reported in this chart.

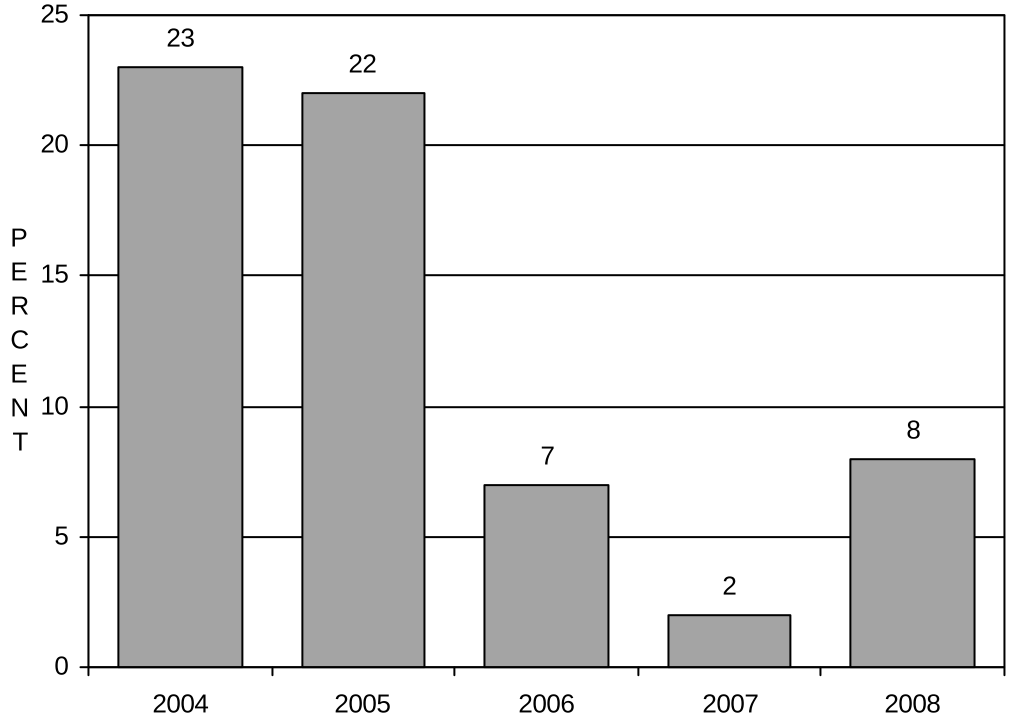
FIGURE 29
Visiting The Las Vegas Strip*
(Among Those Who Visited Or Plan To Visit Las Vegas)



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

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

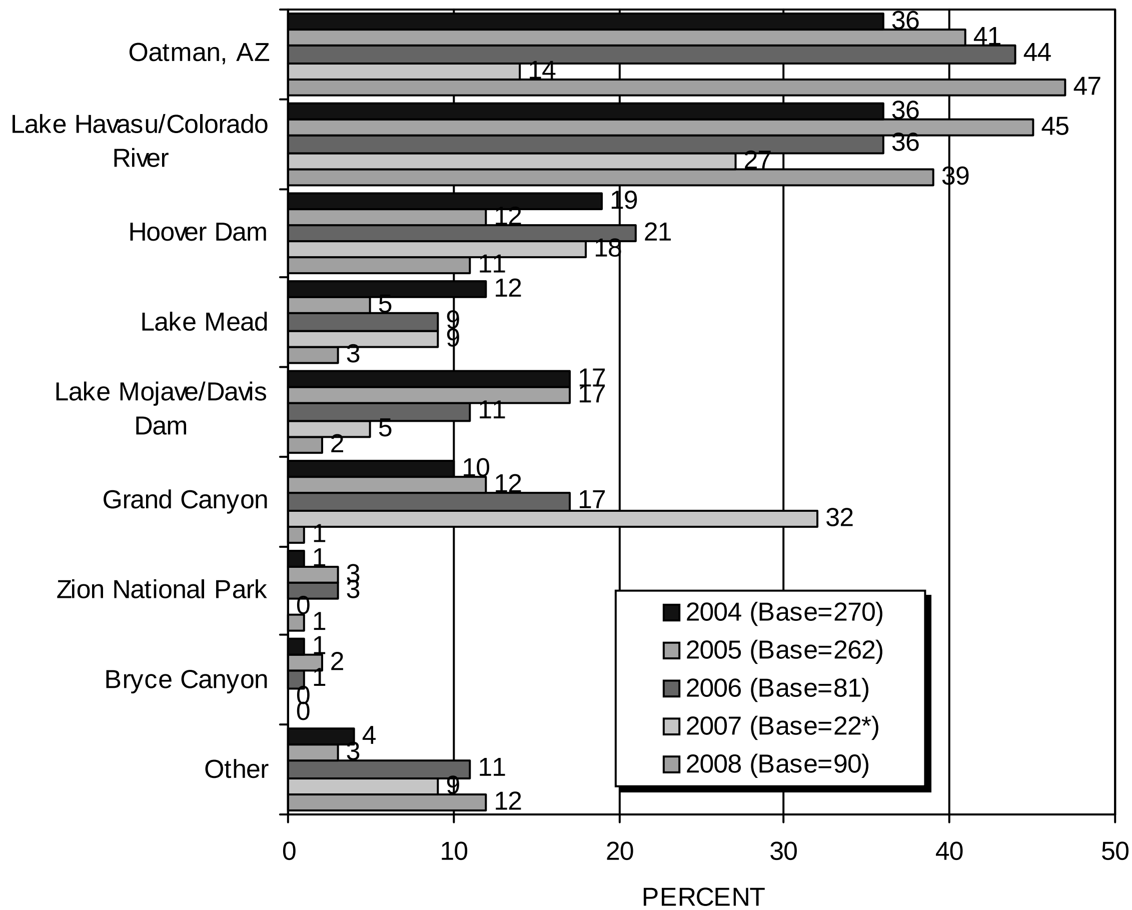
FIGURE 30
Touring Other Nearby Places*
(Among All Visitors)



We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 30), and only 8% said yes, up significantly from last year, but down significantly from 2004 and 2005.

* 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 Oatman (47%), the Lake Havasu/Colorado River area (39%), Hoover Dam (11%, down from 19% in 2004), Lake Mead (3%, down from 12% in 2004), and the Lake Mojave/Davis Dam area (2%, down from 17% in 2004 and 2005 and 11% in 2006). Only 1% of those who visited other places went to the Grand Canyon, down from all prior years.

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* 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 (78%) reported two adults in their party, an increase from 75% in 2004 and 73% in 2005, but a decrease from 84% in 2007. Seven percent (7%) said they were traveling alone, a decrease from 11% in 2006. Ten percent (10%) said they were traveling in a party of four or more people (up significantly from 3% in 2006 and 4% in 2007). The average party size in 2008 was 2.3 persons, up significantly from 2.0 in 2006 and 2.1 in 2007.

FIGURE 32
Adults In Immediate Party

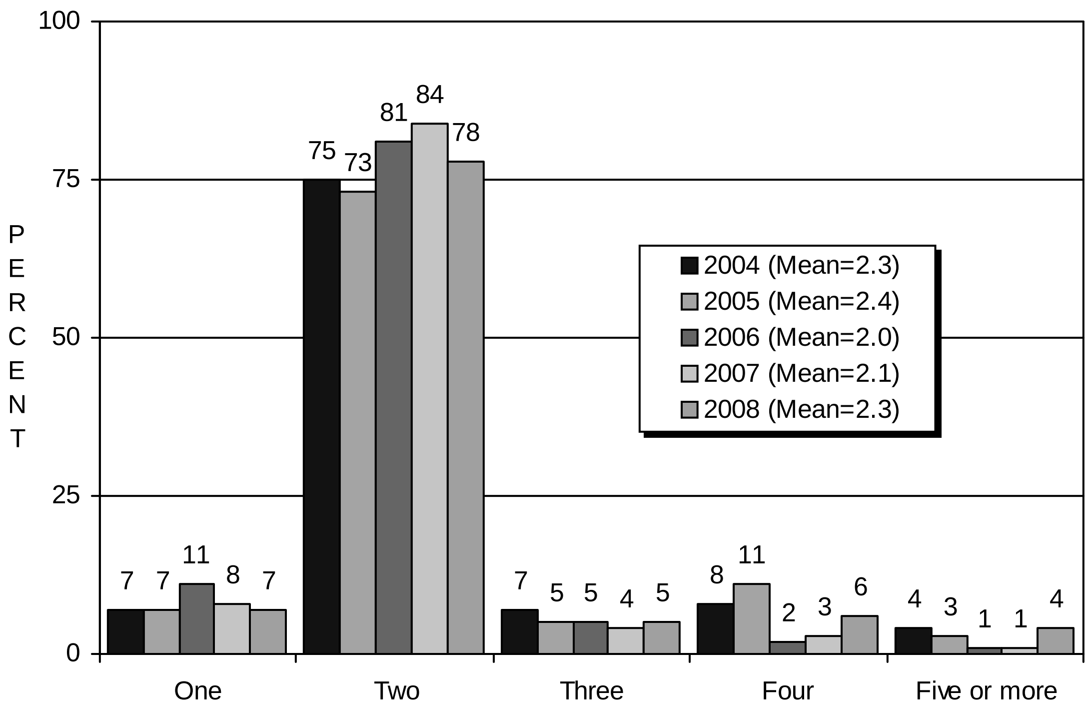
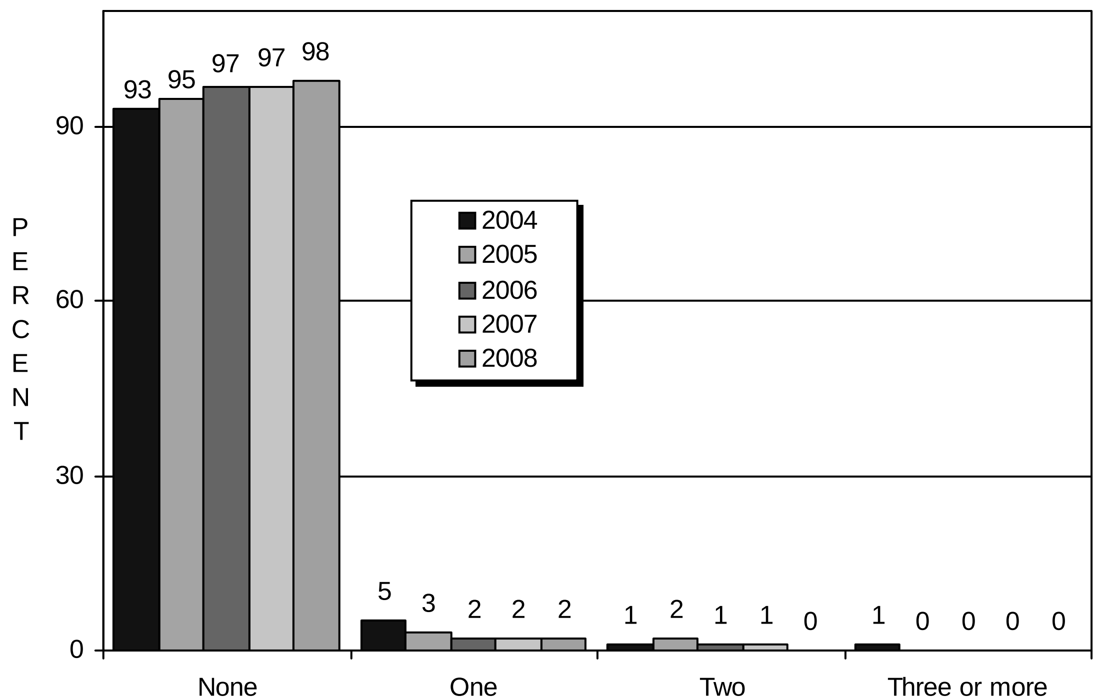


FIGURE 33
Number Of Persons In Immediate Party Under Age 21



We asked visitors how many people under 21 years old were in their immediate party (Figure 33). Almost all visitors (98%) reported no one under 21 in their party, up from 93% in 2004 and 95% in 2005. Only 2% said their party included someone under the age of 21, down from 7% in 2004 and 5% in 2005.

FIGURE 34
Nights Stayed

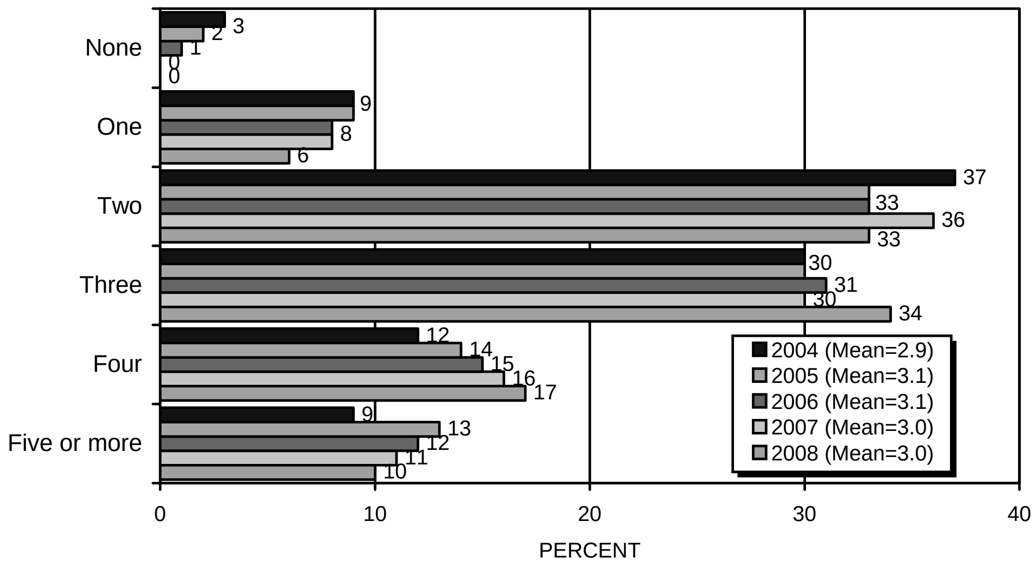
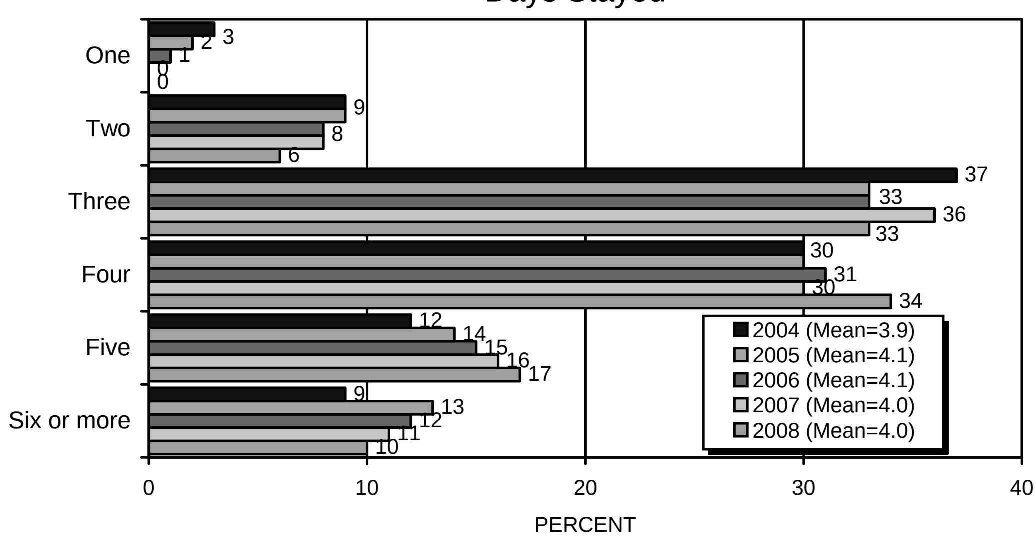
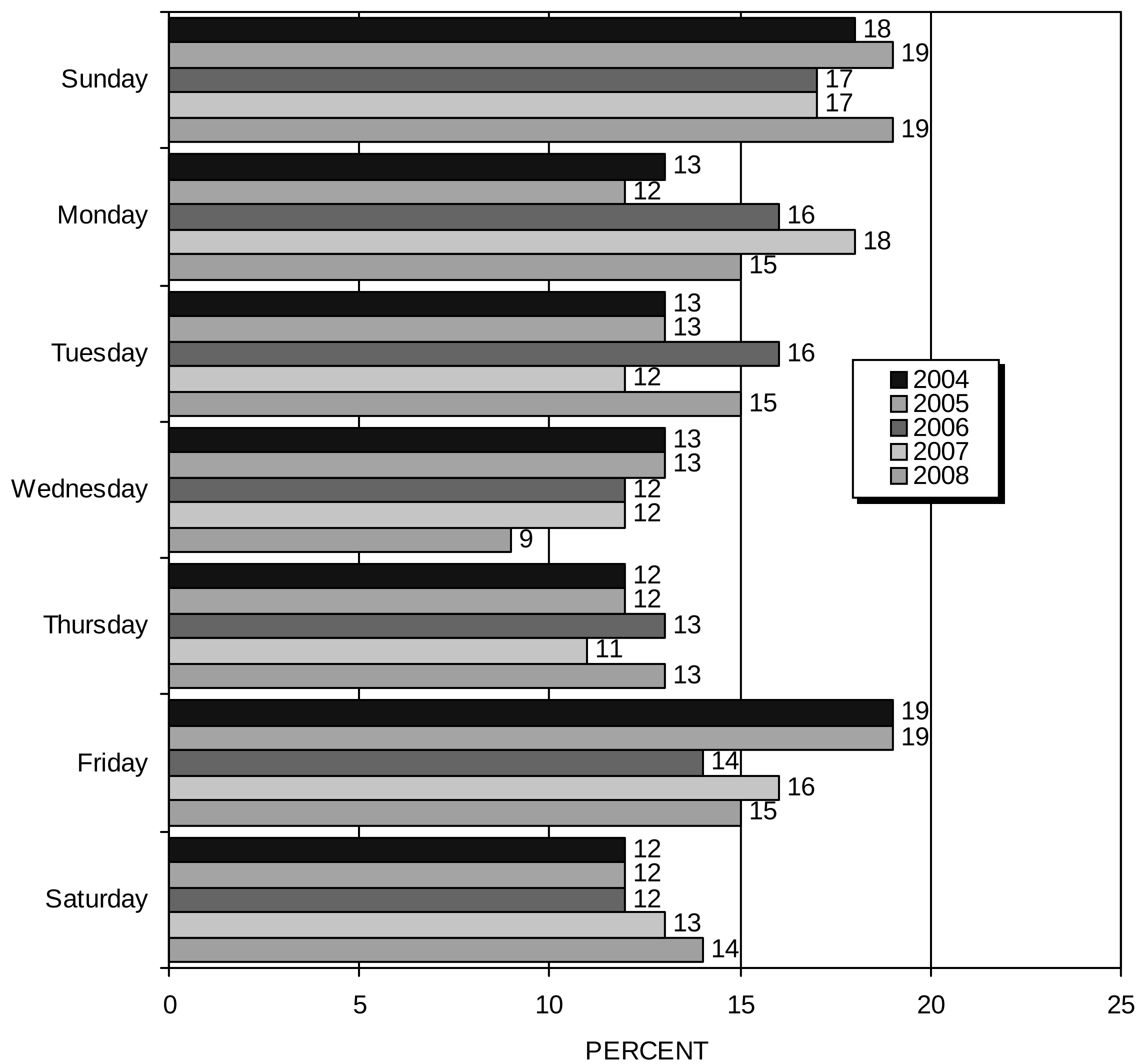


FIGURE 35
Days Stayed



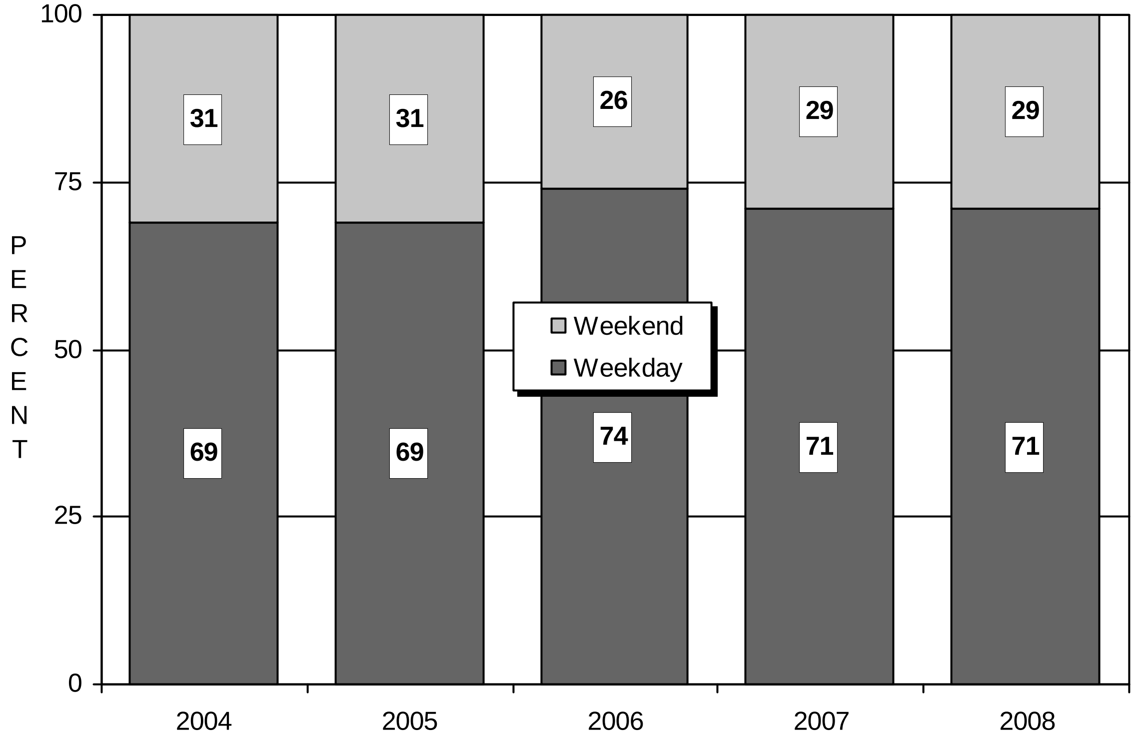
During 2008, Laughlin visitors stayed an average of 3.0 nights and 4.0 days (Figures 34 and 35).

FIGURE 36
Day Of Arrival



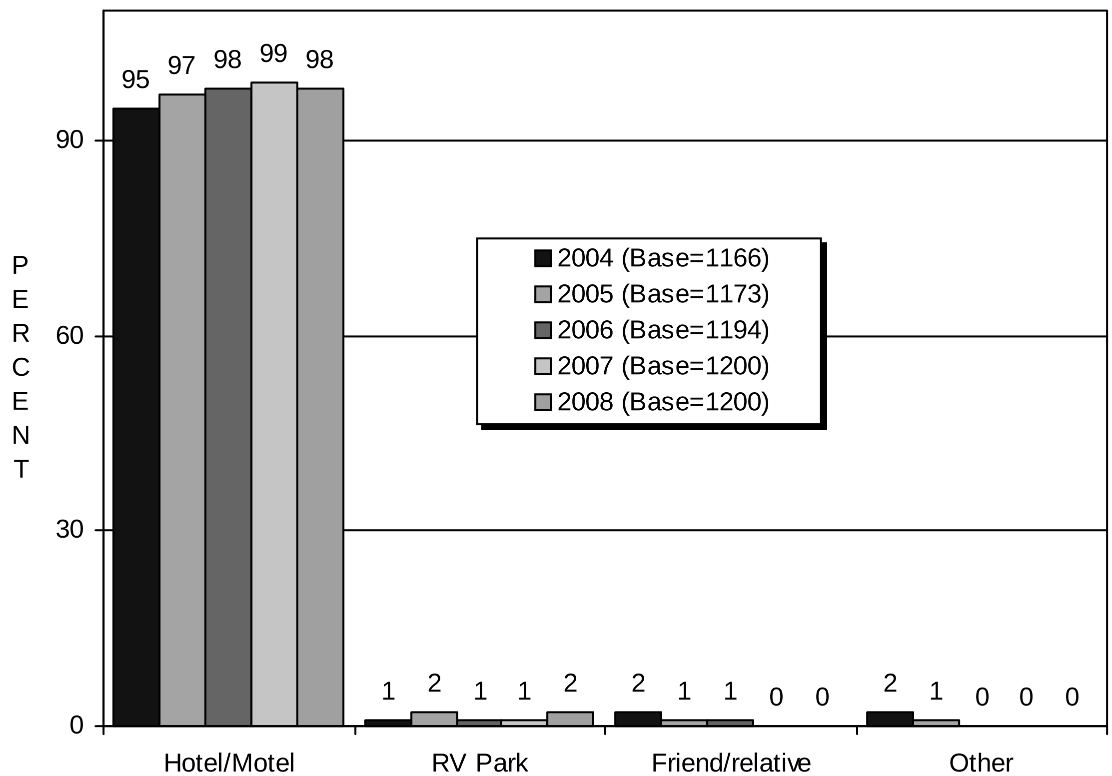
Visitors were most likely to arrive in Laughlin on a Sunday (19%) and least likely to arrive on a Wednesday (9%, down from all prior years) (Figure 36).

FIGURE 37
Weekend Versus Weekday Arrival



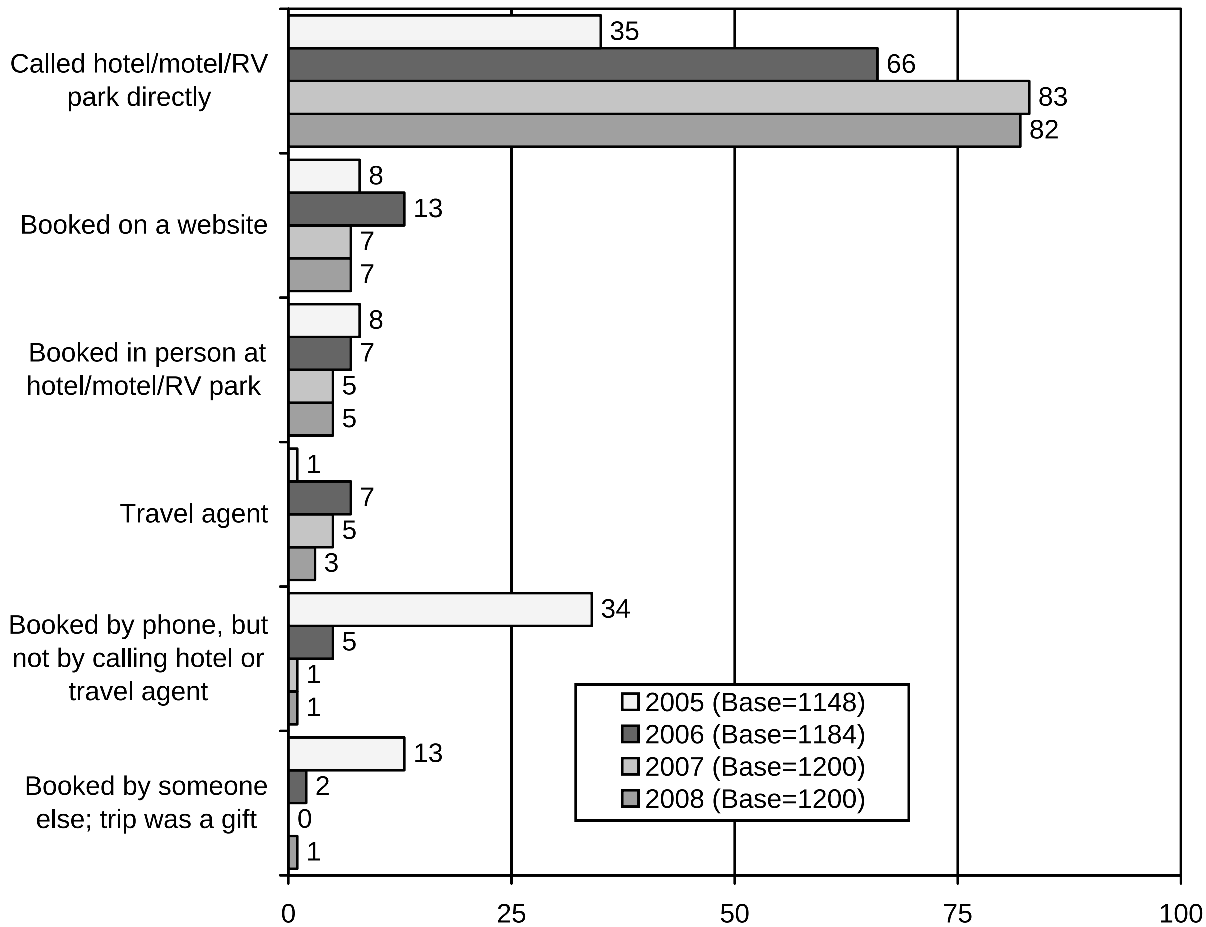
The likelihood of arriving in Laughlin on a weekend (Friday or Saturday) was 29%, while 71% of visitors arrived between Sunday and Thursday (Figure 37).

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



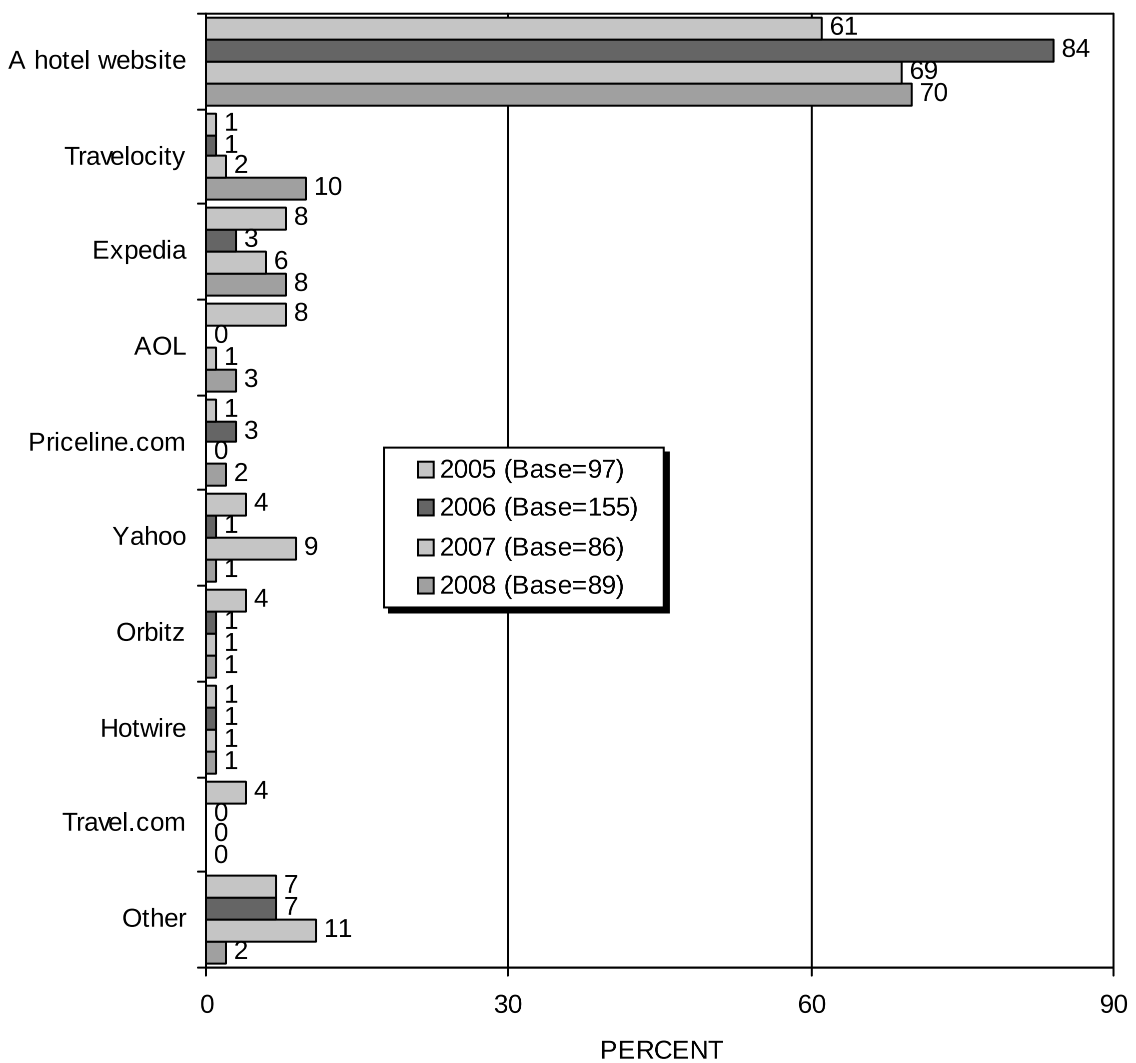
As shown in Figure 38, the proportion of visitors staying in hotels among visitors who stayed overnight was 98%, up from 95% in 2004.

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



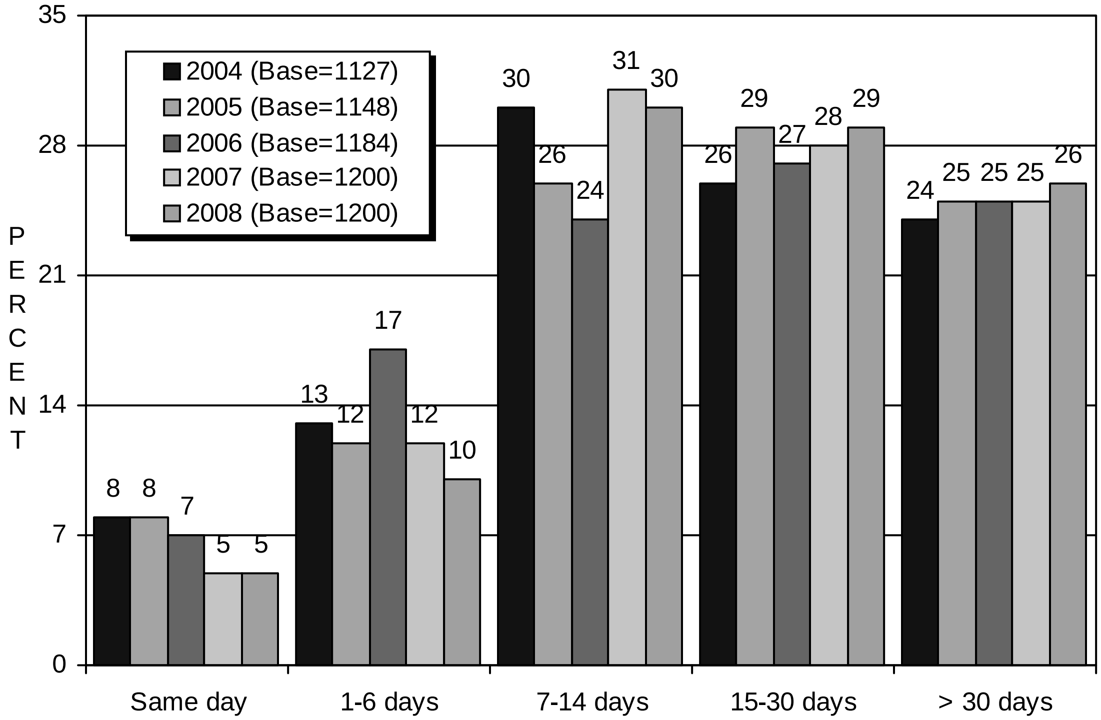
Beginning in 2005, visitors were asked how they booked their accommodations (Figure 39). This year more than eight in ten (82%) said they booked their accommodations by calling the property directly (a significant increase from 35% in 2005 and 66% in 2006), 7% booked on a website (down from 13% in 2006), 5% booked in person (down from 8% in 2005), 3% said they booked through a travel agent (up from 1% in 2005 but down from 7% in 2006), 1% said they booked by phone, but not by calling the hotel or a travel agent (a significant decrease from 34% in 2005 and 5% in 2006), and 1% said their lodging was booked by someone else or was a gift (down from 13% in 2005).

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



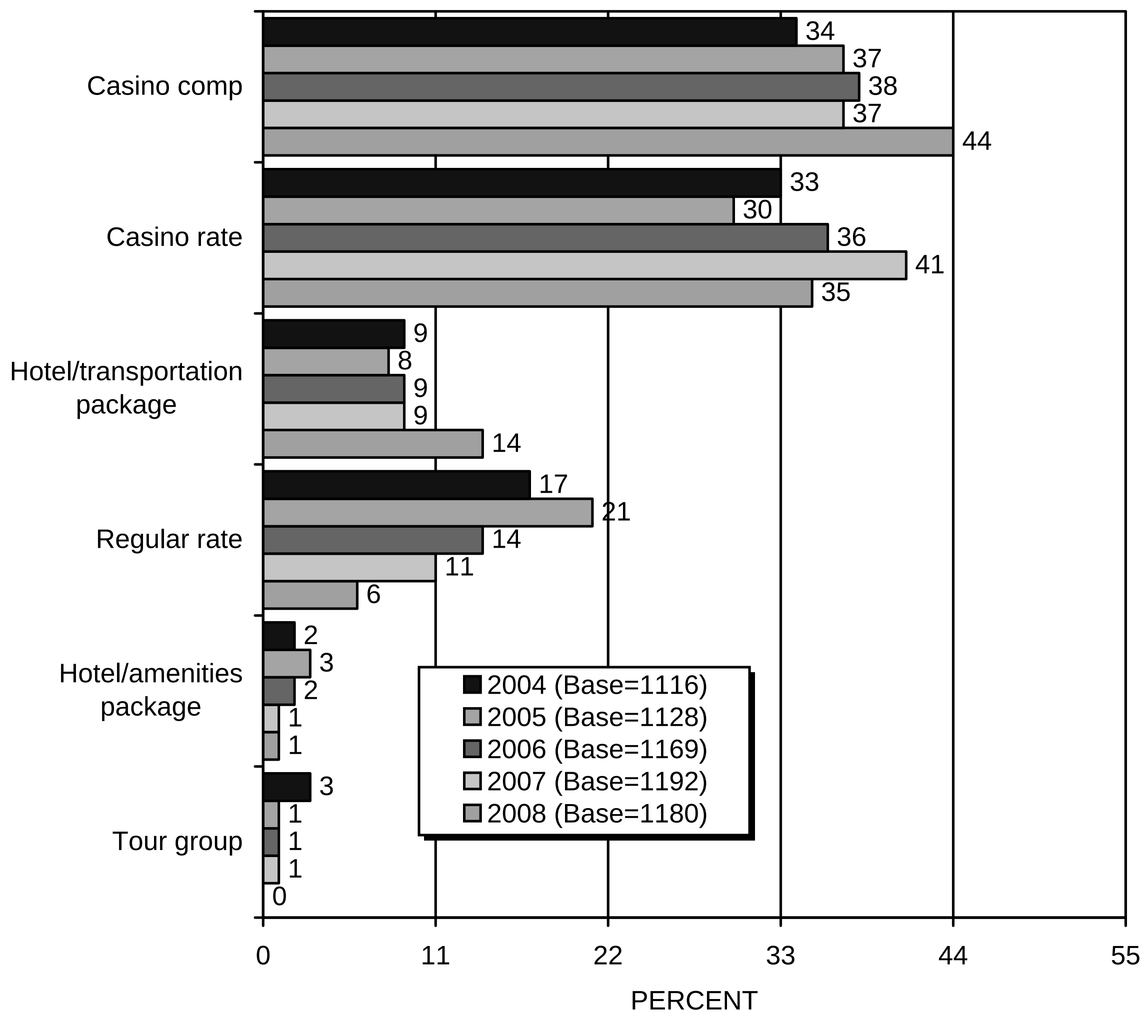
Beginning in 2005, visitors who booked their accommodations on a web site were asked which website they used to book their accommodations (Figure 40). Seven in ten (70%) said they used a hotel website to book their accommodations, a decrease from 84% in 2006. One in ten (10%) used Travelocity (up from all prior years), 8% used Expedia, 1% booked their accommodations through Yahoo (a decrease from 9% last year), while other websites each accounted for 2% or less.

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 8% in both 2004 and 2005 and 7% in 2006), 10% booked one to six days in advance (down from 17% in 2006), 60% booked 7 to 30 days in advance (up from 51% in 2006), and 26% booked more than 30 days in advance.

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). Almost eight in ten (79%) reported receiving some type of casino rate, either a casino complimentary rate (44%, up significantly from all previous years), or a casino rate (35%, down from 41% last year). Fifteen percent (15%) received a package rate (at the 2004 level, but up from 2005, 2006, and 2007), with almost all of that increase accounted for by hotel-transportation packages (14%), which was up significantly from all prior years. The number of visitors who said they received a regular room rate (6%) was down significantly from all prior years.

FIGURE 43
Room Rate By Booking Method
(2008)

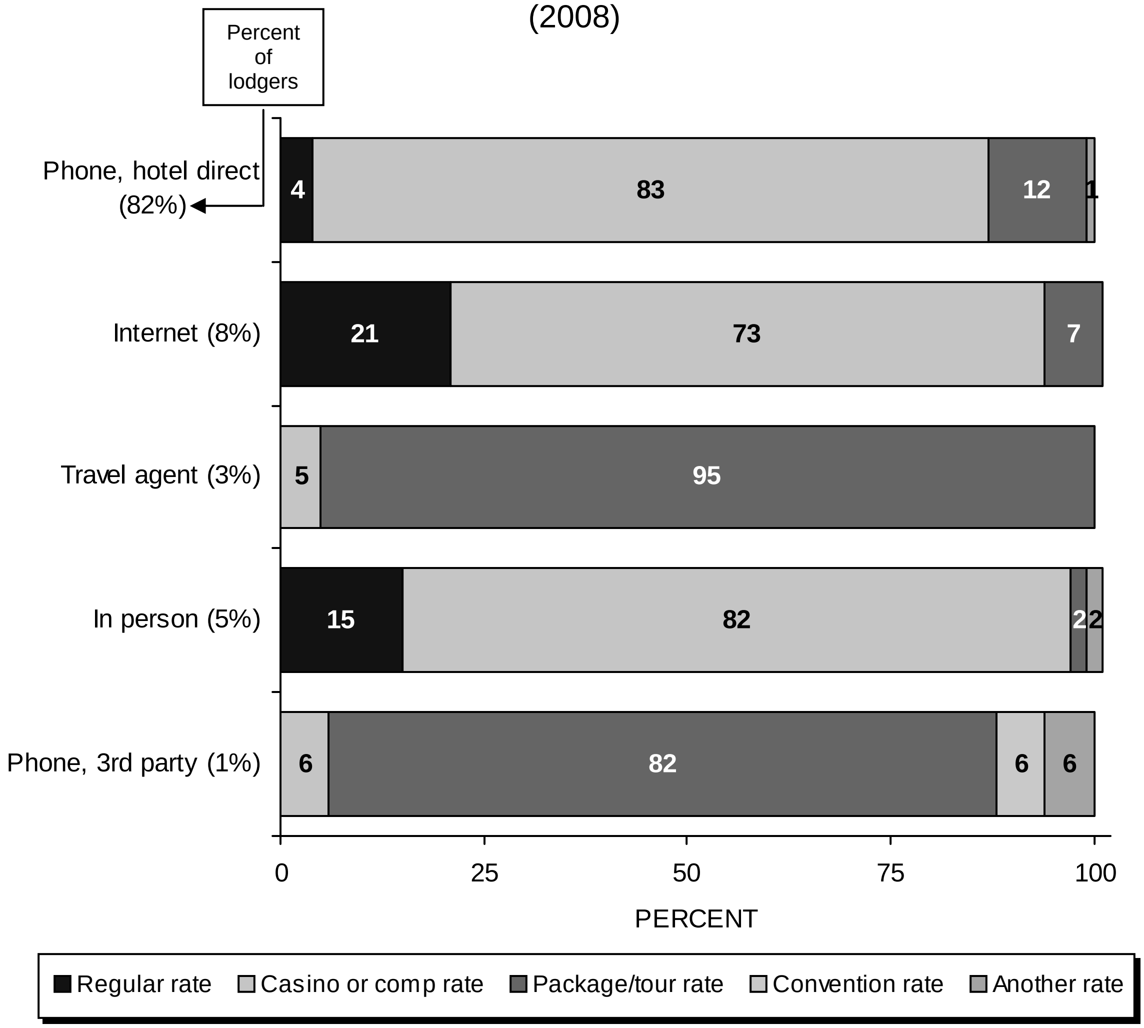
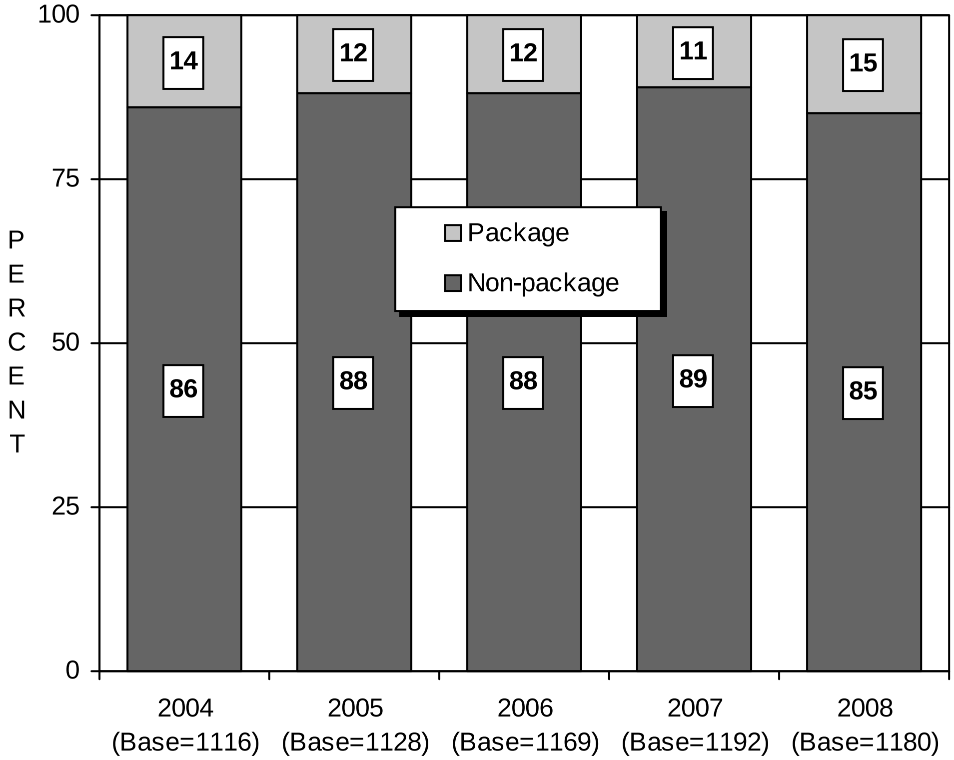


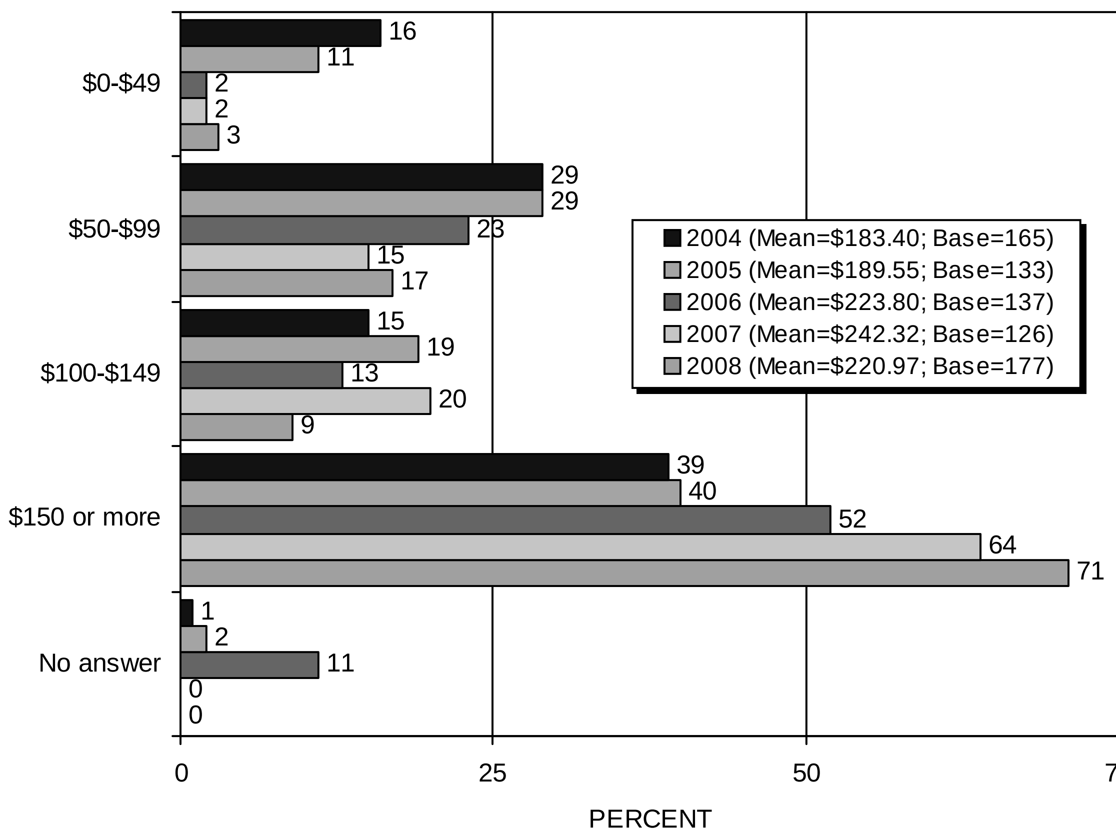
Figure 43 shows the room rate category by the booking method for 2008. Those who called the hotel directly (83%), booked on the Internet (73%), or in person (82%), were more likely than those who booked by phone through a third party (6%) or through a travel agent (5%) to say they got a casino or casino complimentary rate. Those who booked through a travel agent (95%) or on the phone through a third party (82%) 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 on the Internet (21%), followed by those who booked in person (15%) and those who phoned the hotel directly (4%).

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



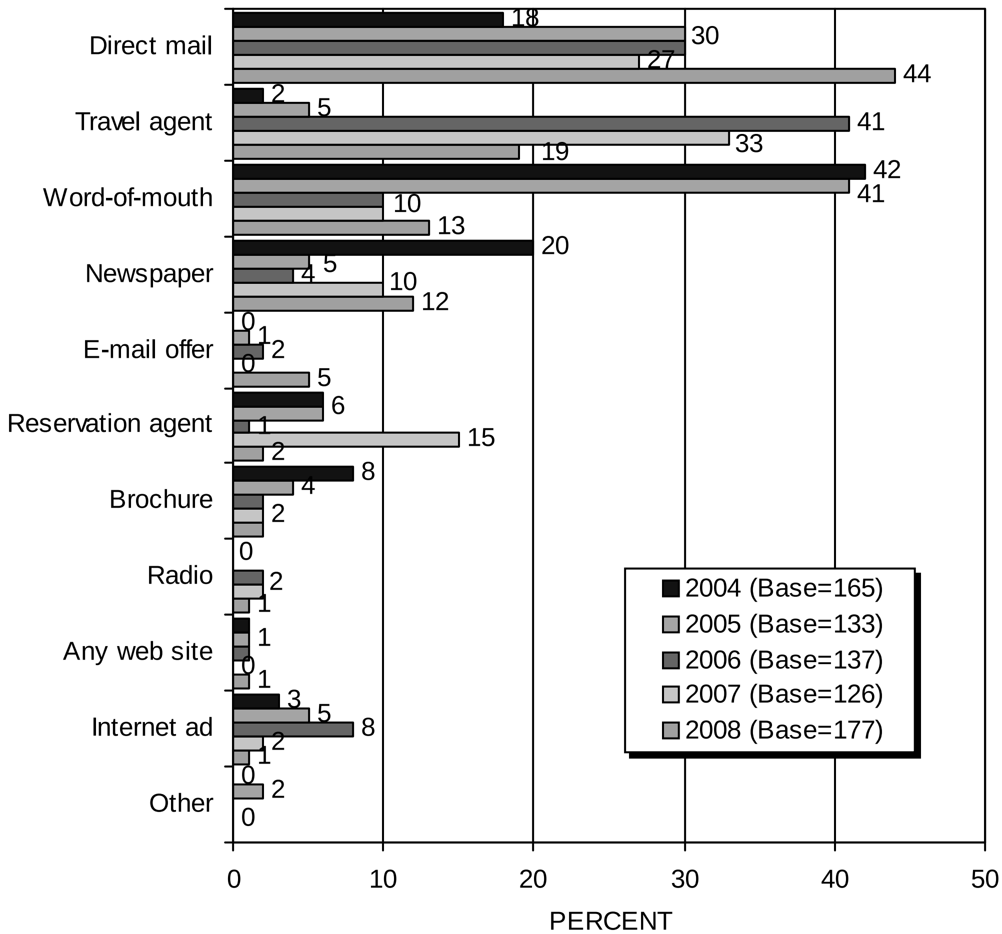
In 2008, 15% received their lodging as part of a package deal, up from 2005, 2006, and 2007 (Figure 44).

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



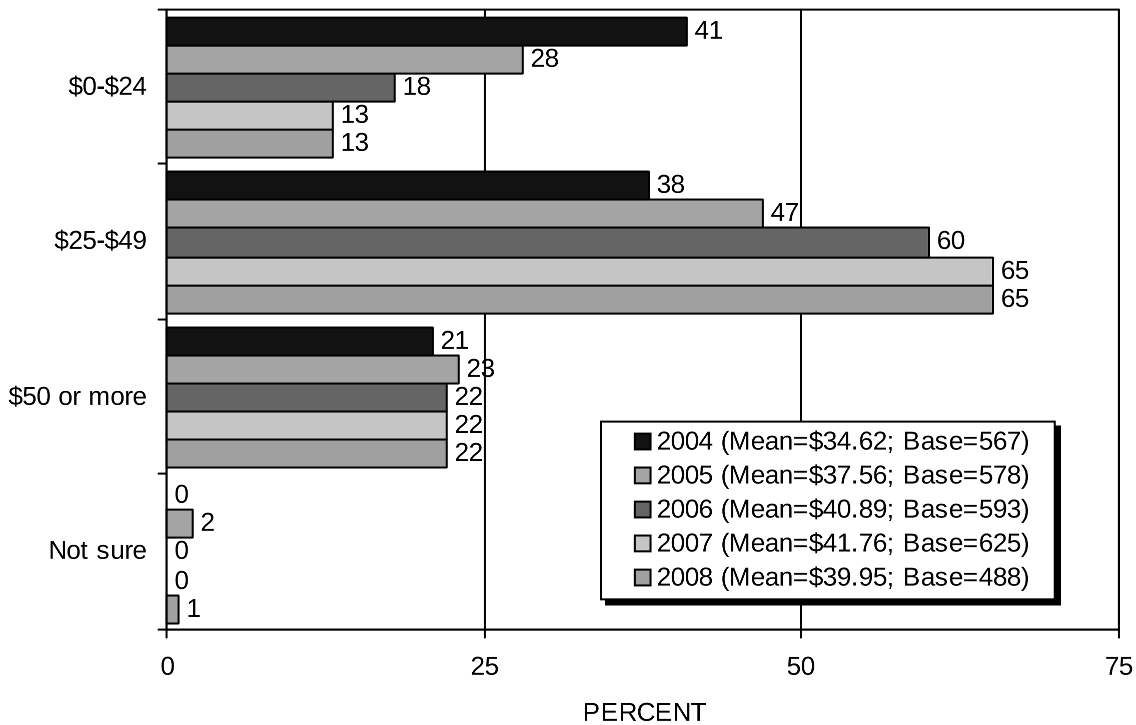
We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 45). More than seven in ten (71%) said they paid $150 or more for their package (an increase from 39% in 2004, 40% in 2005, and 52% in 2006). Seventeen percent (17%) paid $50 to $99 (down from 29% in 2004 and 2005), 9% paid $100 to $149 (down from 19% in 2005 and 20% in 2007), and 3% paid less than $50 (down from 16% in 2004 and 11% in 2005). The average package cost was $220.97, which is not significantly different from past averages.

FIGURE 46
How First Learned About Package
(Among Those Who Bought A Package)



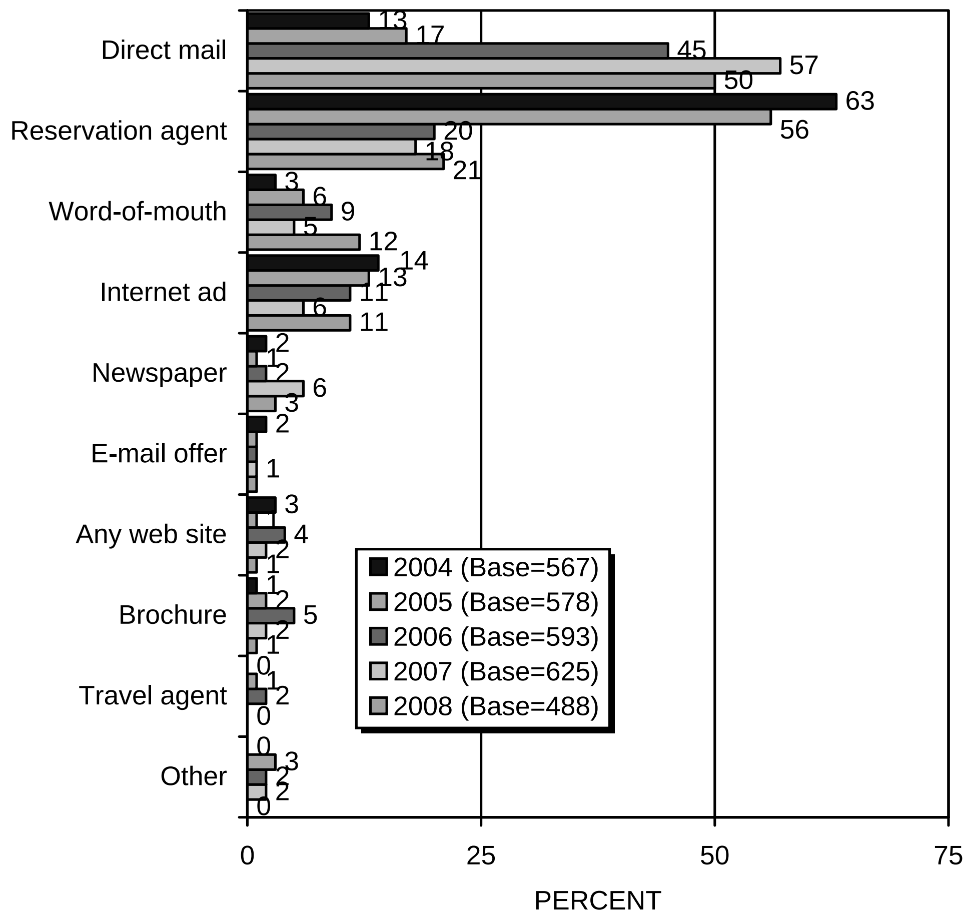
Package purchasers were asked how they first found out about the package they bought for their trip to Laughlin (Figure 46). Forty-four percent (44%) said they received an offer through the mail (up significantly from all prior years). Two in ten (19%) said they first heard about the package through a travel agent (up from 2% in 2004 and 5% in 2005, but down from 41% in 2006 and 33% in 2007). Thirteen percent (13%) heard about the offer through word-of-mouth (down from 42% in 2004 and 41% in 2005), and 12% said they found out about the package in a newspaper (up from 5% in 2005 and 4% in 2006). One in twenty (5%) found the package in an email offer (up from prior years), 2% from a reservation agent (down from 15% last year), 2% through a brochure (down from 8% in 2004), and 1% from an Internet ad (down from 5% in 2005 and 8% in 2006). Radio, any website, and other accounted for less than 2%.

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



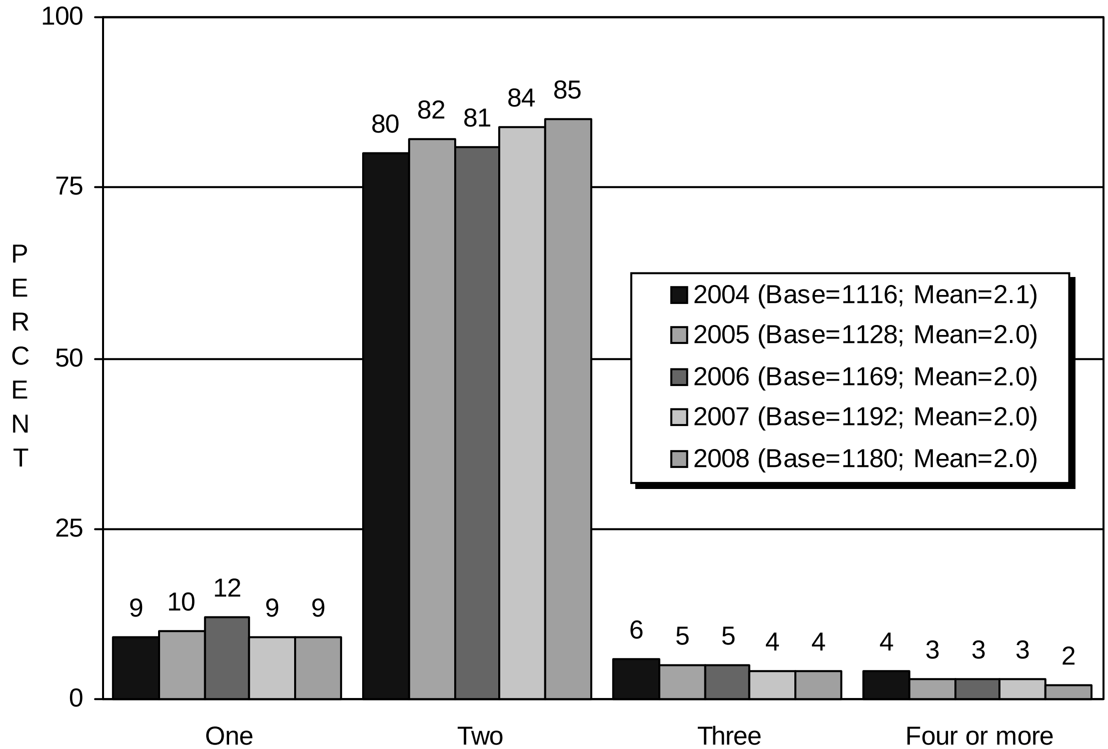
The average reported room cost among non-package hotel and motel lodgers in 2008 was $39.95, similar to last year, but up significantly from $34.62 in 2004 (Figure 47).

FIGURE 48
How First Learned About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



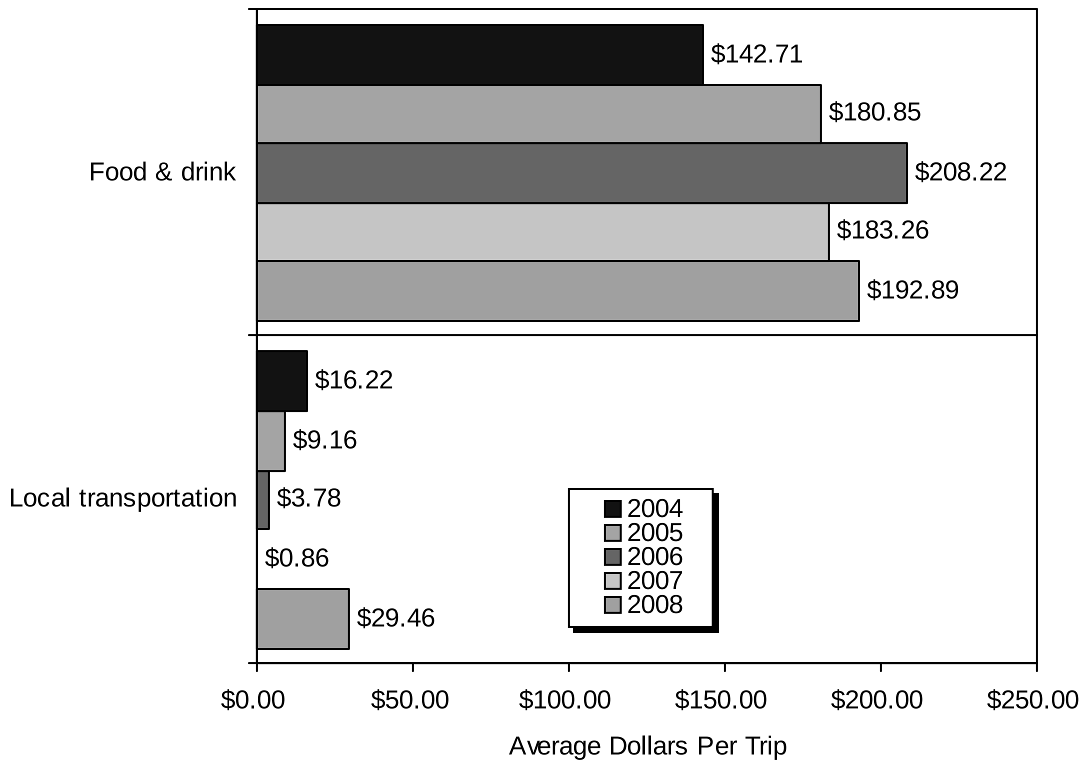
Non-package hotel and motel lodgers were asked how they first found out about the room rate they paid (Figure 48). One-half (50%) said they received an offer in the mail, a significant increase from 13% in 2004 and 17% in 2005. Two in ten (21%) said they first heard of their room rate from a reservation agent or through a call center, down significantly from 63% in 2004 and 56% in 2005. Twelve percent (12%) said they heard about it through word of mouth, up from 3% in 2004, 6% in 2005, and 5% in 2007. Eleven percent (11%) saw an advertisement on the Internet (up from 6% last year), and another 3% said they heard about the rate from a newspaper (down from 6% last year). One percent (1%) each heard about the rate from an email offer, a website, or a brochure. No one heard about the rate from a travel agent.

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



As Figure 49 shows, the majority of visitors (85%) said that two people stayed in their room. The average number of room occupants per hotel/motel room was 2.0 occupants, unchanged from prior years.

FIGURE 50
Average Trip Expenditures On Food & Drink — And Local Transportation*
(Including Visitors Who Spent Nothing In That Category)



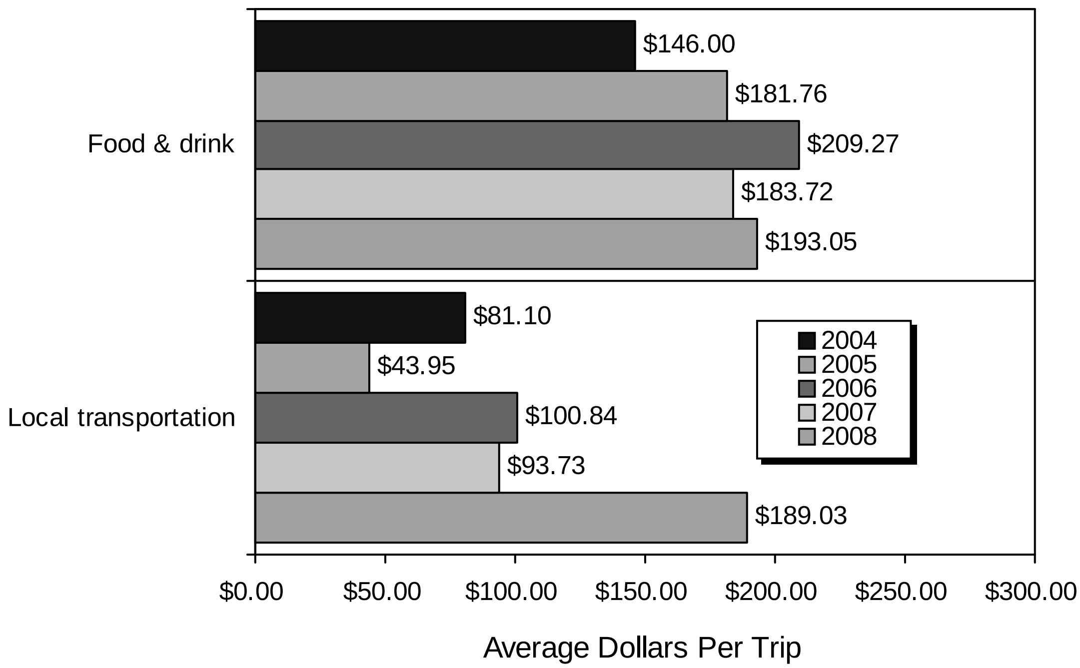
We asked all visitors about their daily expenditures on food and drink and on local transportation.

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 $192.89 per trip, down from $208.22 in 2006, but up significantly from $142.71 in 2004, $180.85 in 2005, and $183.26 in 2007. The average local transportation expenditures were $29.46 per trip, up significantly from all prior years[†].

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

† Prior to 2008, local transportation expenditures included spending only within the city of Laughlin; expenditures made in nearby Bullhead City were not included. In an effort to gain a better understanding of local transportation spending in the greater Laughlin area, starting in 2008 local transportation expenditures include spending in both Laughlin and Bullhead City.

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



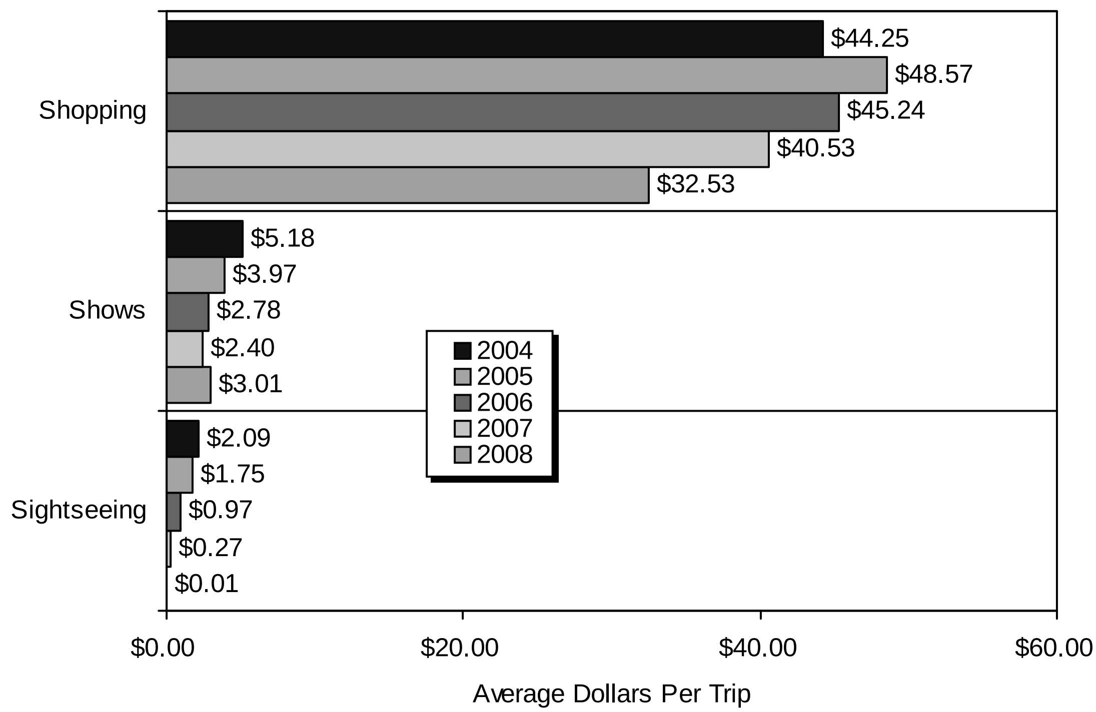
Among visitors who indicated they spent money in these categories, average food and drink expenditures in the current study were $193.05 per trip, down significantly from $209.27 in 2006, but up significantly from $146.00 in 2004, $181.76 in 2005 and $183.72 in 2007 (Figure 51). Average local transportation expenditures were $189.03 per trip, up substantially from all previous years*.

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

	2004	2005	2006	2007	2008
Food and drink					
Base size	(1173)	(1194)	(1194)	(1197)	(1199)
Proportion of total	98%	99.5%	99.5%	99.8%	99.9%
Local transportation					
Base size	(240)	(250)	(45)	(13)	(187)
Proportion of total	20%	21%	4%	1%	16%

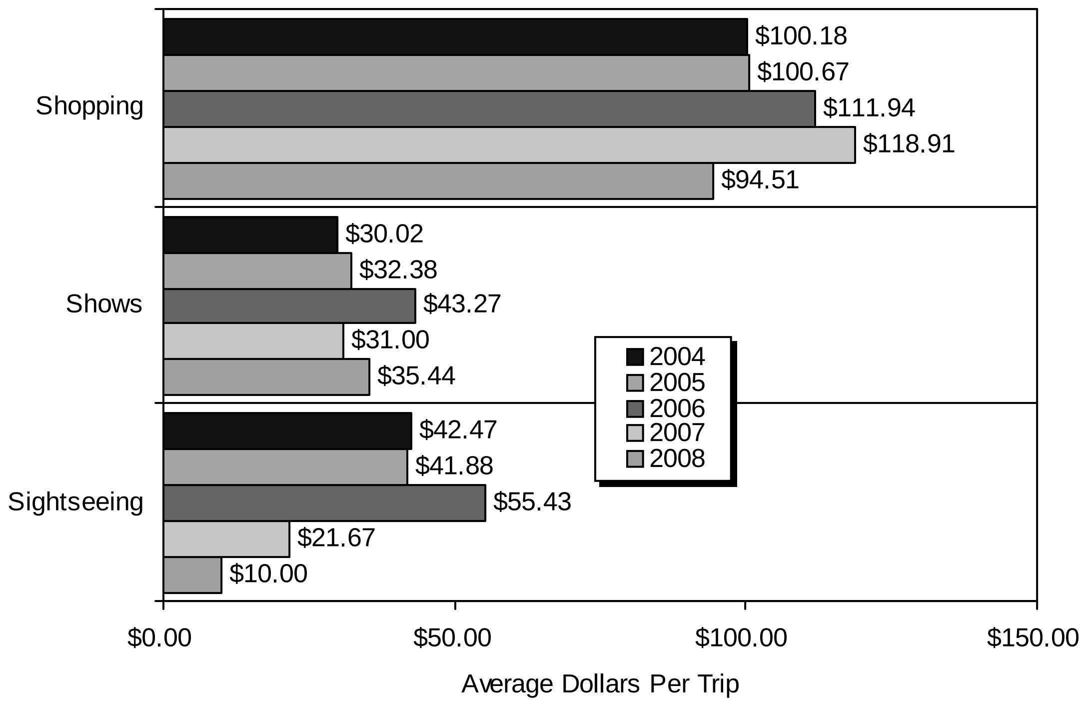
* Prior to 2008, local transportation expenditures included spending only within the city of Laughlin; expenditures made in nearby Bullhead City were not included. In an effort to gain a better understanding of local transportation spending in the greater Laughlin area, starting in 2008 local transportation expenditures include spending in both Laughlin and Bullhead City.

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 2008 was $32.53, down significantly from all prior years. An average of $3.01 was spent on shows (down from $5.18 in 2004), and an average of $0.01 was spent on sightseeing (a decrease from all prior years).

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 2008 was $94.51, down from $111.94 in 2006 and $118.91 in 2007 (Figure 53). The average spent on shows was $35.44, up from $31.00 last year, but down from $43.27 in 2006. The average spent on sightseeing was $10.00, down from all prior years.

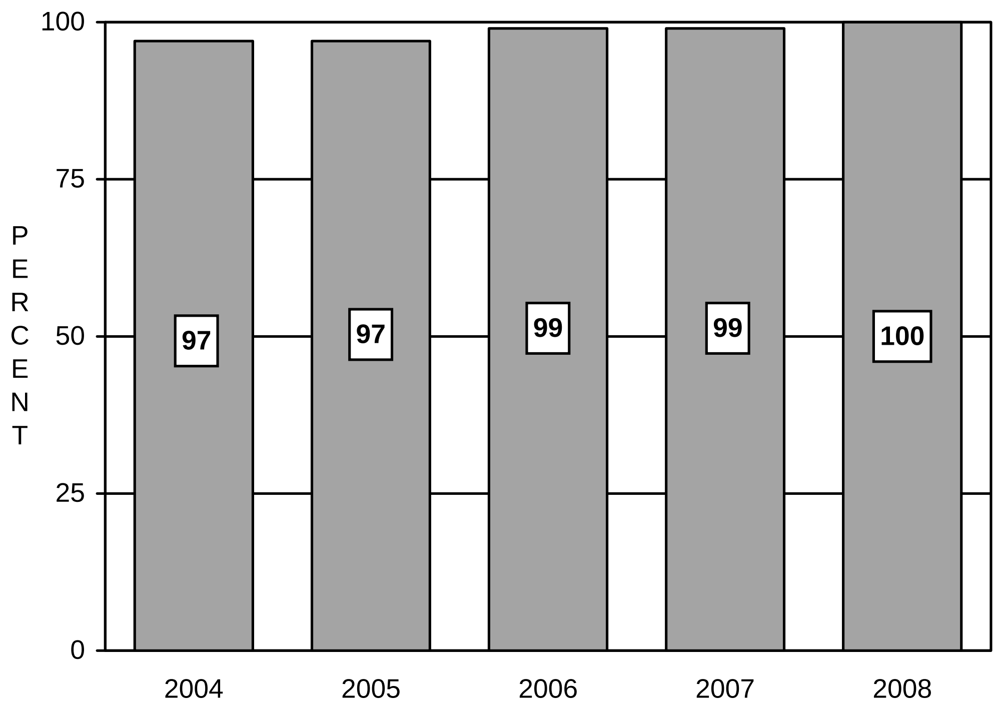
Percentages of visitors who spent money in each category are shown in the following table:

	2004	2005	2006	2007	2008
Shopping					
Base size	(530)	(579)	(485)	(409)	(413)
Proportion of total	44%	48%	40%	34%	34%
Shows					
Base size	(207)	(147)	(77)	(93)	(102)
Proportion of total	17%	12%	6%	8%	9%
Sightseeing					
Base size	(59)	(50)	(21)	(15)	(1)
Proportion of total	5%	4%	2%	1%	0.1%

GAMING BEHAVIOR AND BUDGETS

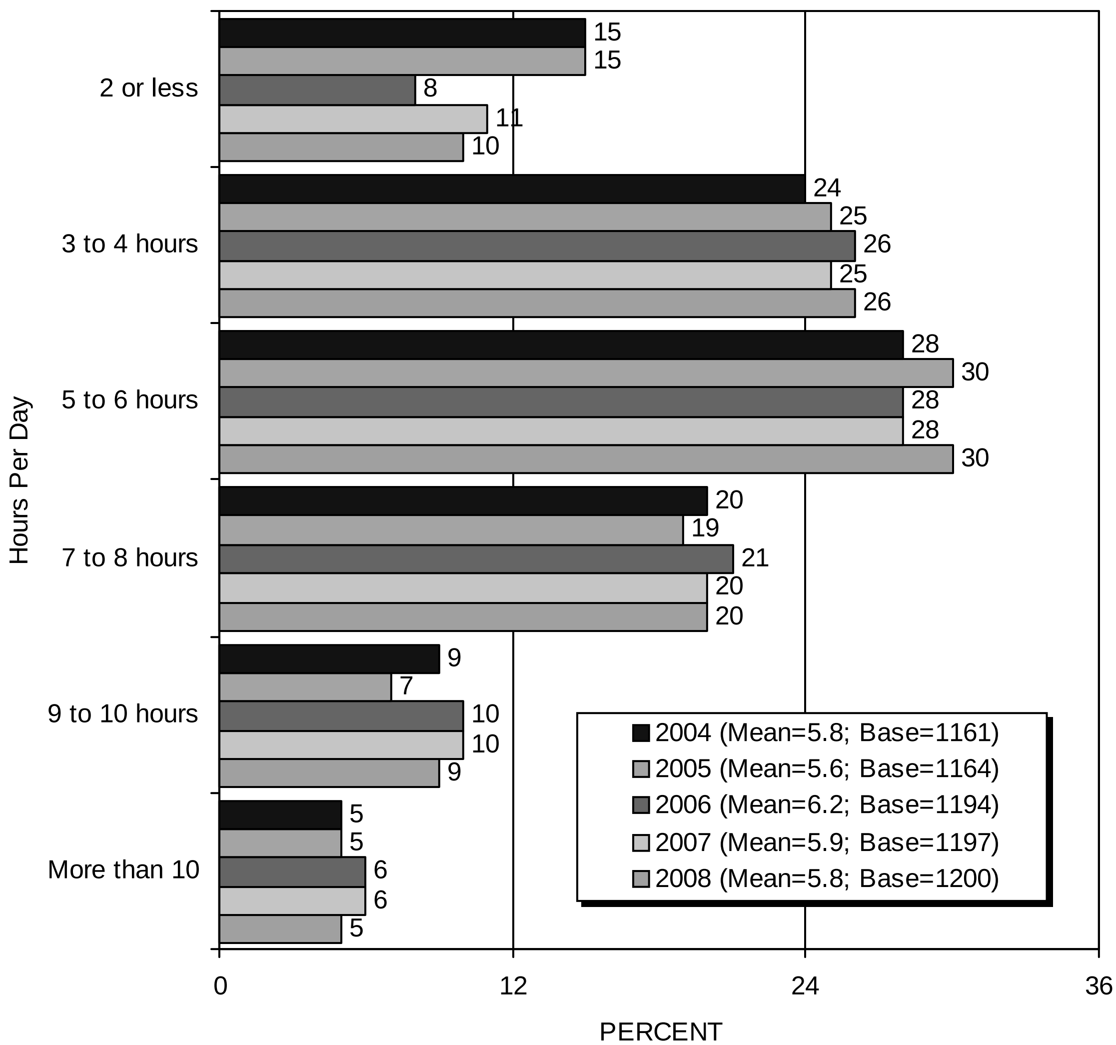
All Laughlin visitors in the current study (100%) said they gambled during their visit, an increase from 97% in both 2004 and 2005 (Figure 54).

FIGURE 54
Whether Gambled While In Laughlin*



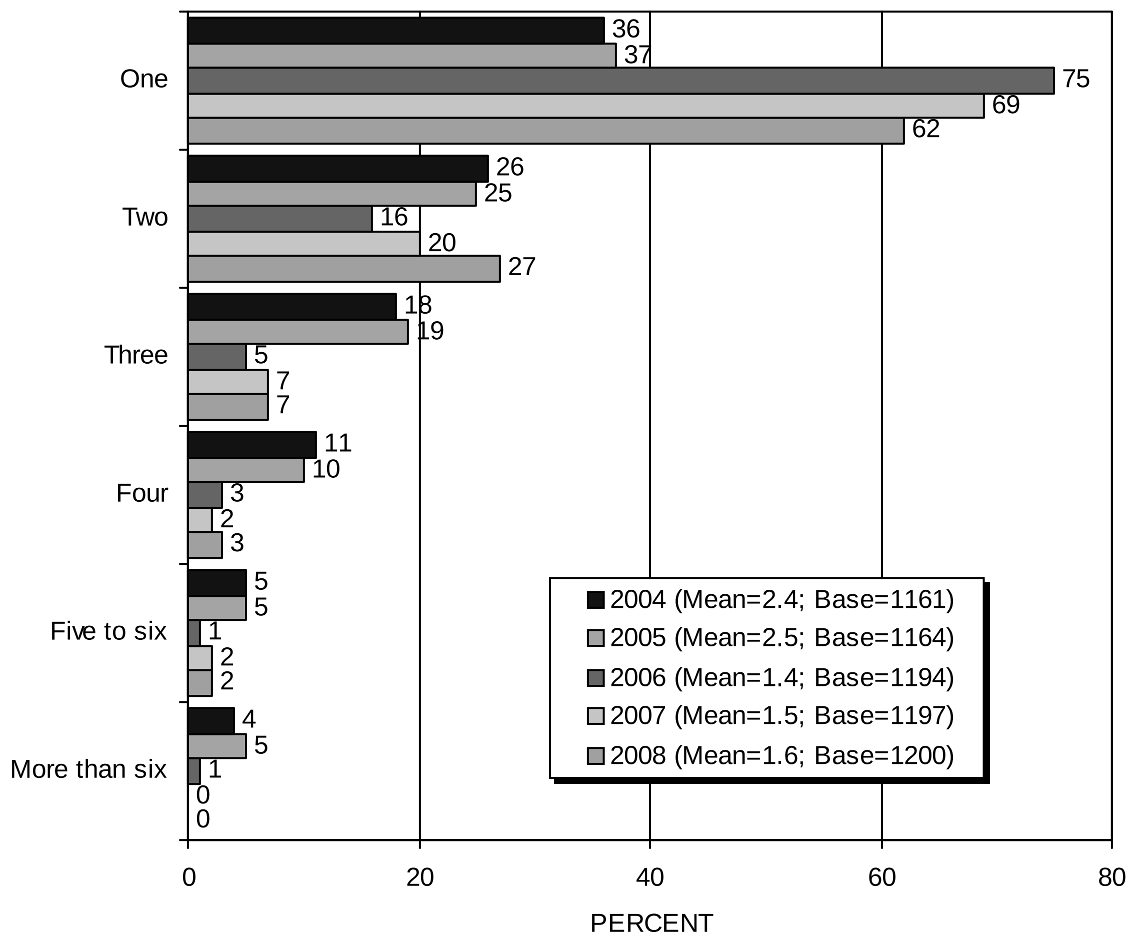
* Only "yes" responses are reported in this chart.

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



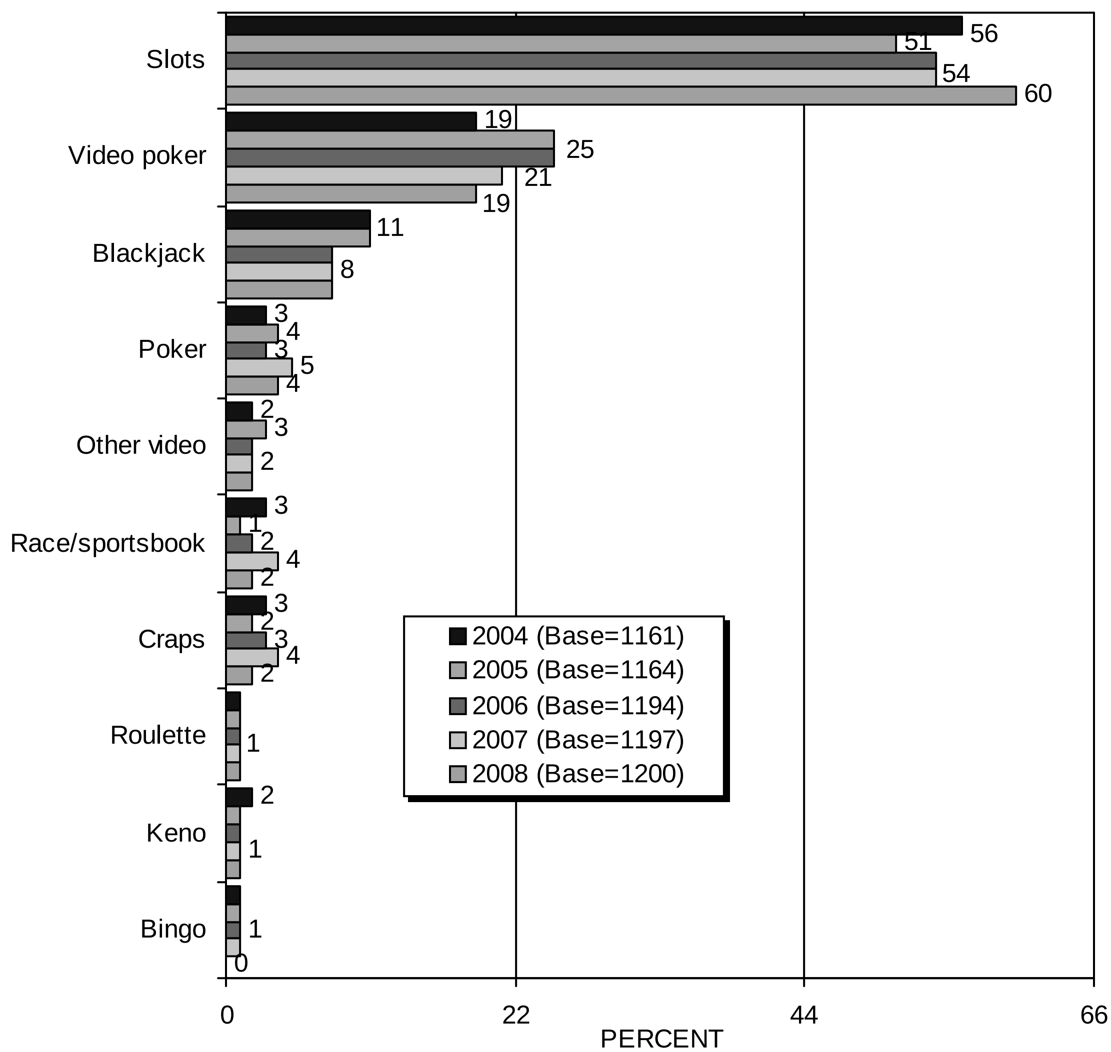
In 2008, Laughlin visitors said they spent an average of 5.8 hours a day gambling, down significantly from 6.2 hours in 2006 (Figure 55).

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



Gamblers reported gambling at an average of 1.6 casinos in 2008, a significant decrease from 2.4 casinos in 2004 and 2.5 casinos in 2005 (Figure 56). More than six in ten visitors (62%) reported gambling at only one casino.

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



As Figure 57 shows, 60% of gamblers in 2008 played slot machines most often, up significantly from all previous years. Two in ten (19%) said they played video poker machines (down from 25% in both 2005 and 2006), followed by 8% who said blackjack (down from 11% in 2004 and 2005). Four percent (4%) played poker most often. The percentage who played craps or sports book most often (2% each) was down significantly from 4% last year.

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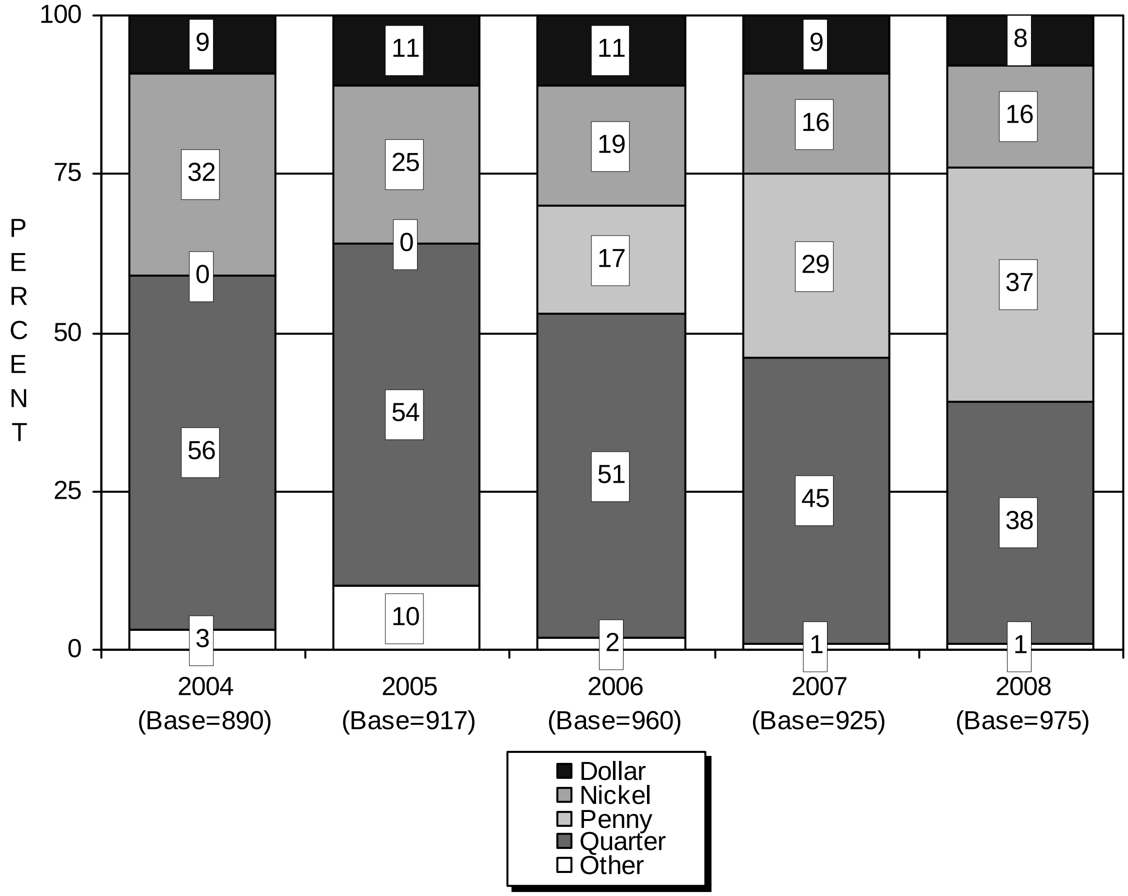
* Percentages may not add to 100% because of rounding.

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

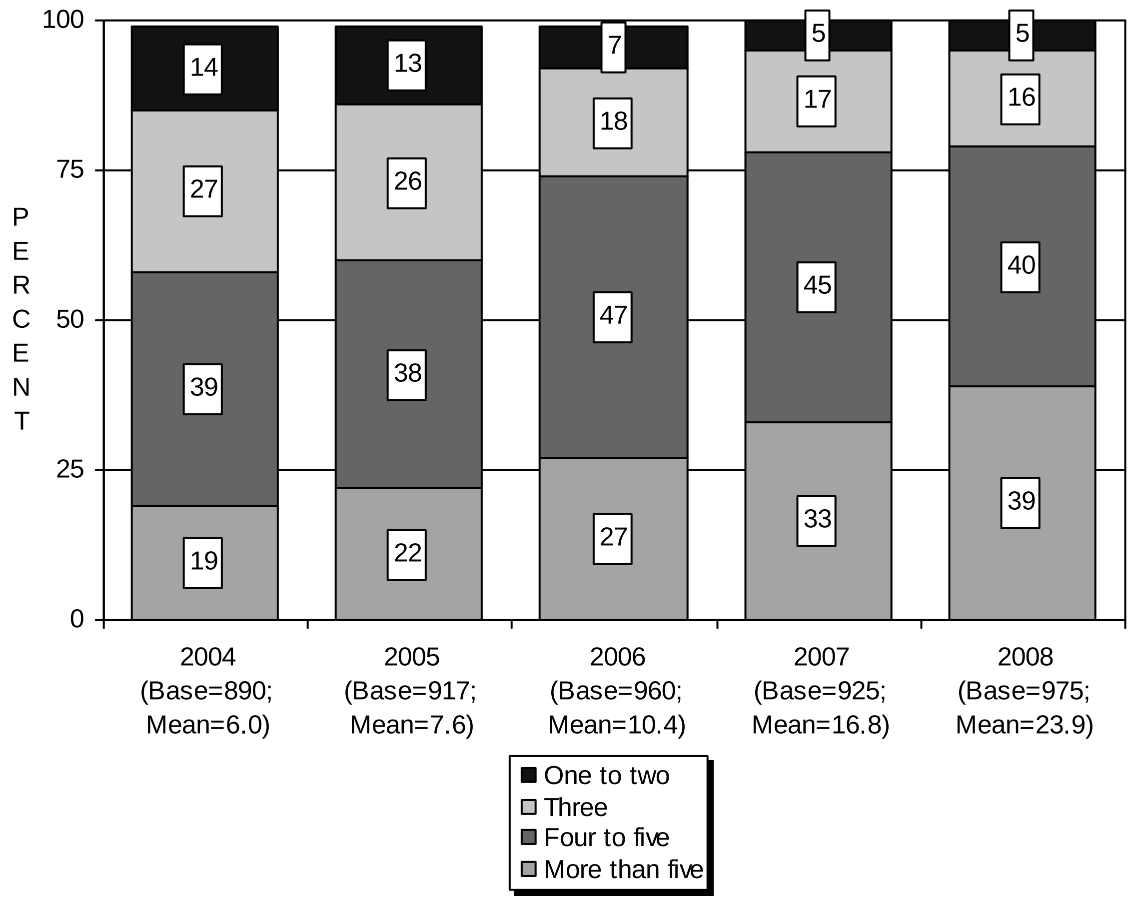


Among those who played slot and video machines in 2008 (Figure 58), 38% played quarter machines most often (down from all prior years), 37% played penny machines (up over the past three years), 16% played nickel machines most often (down from 32% in 2004 and 25% in 2005), and 8% played dollar machines most often (down from 11% in 2005 and 2006).

---

* 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.

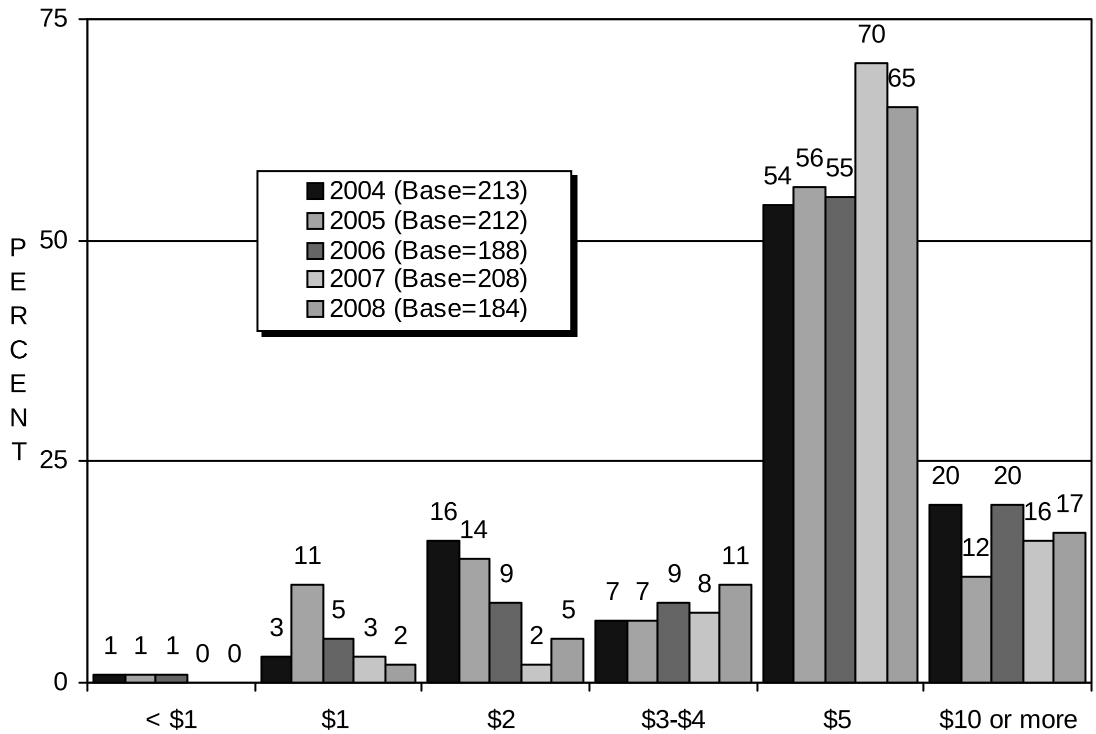
FIGURE 59
Average Coins/Tokens For Each Play*
(Among Those Who Played Slot And Video Machines)



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). There has been a dramatic increase in the number of coins/tokens played, likely due to the greatly increased popularity of penny machines. In 2008, the average number of coins or tokens per play was 23.9, up significantly from the all previous years.

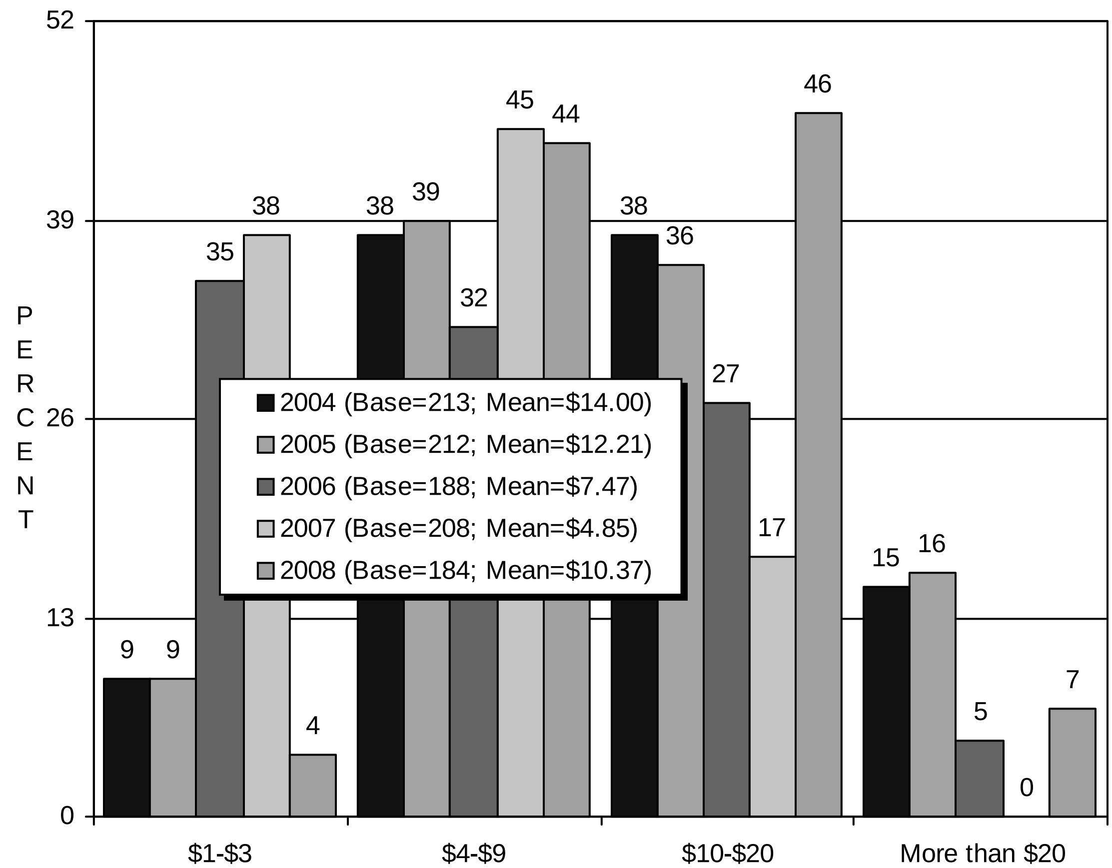
* Percentages may not add to 100% because of rounding.

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



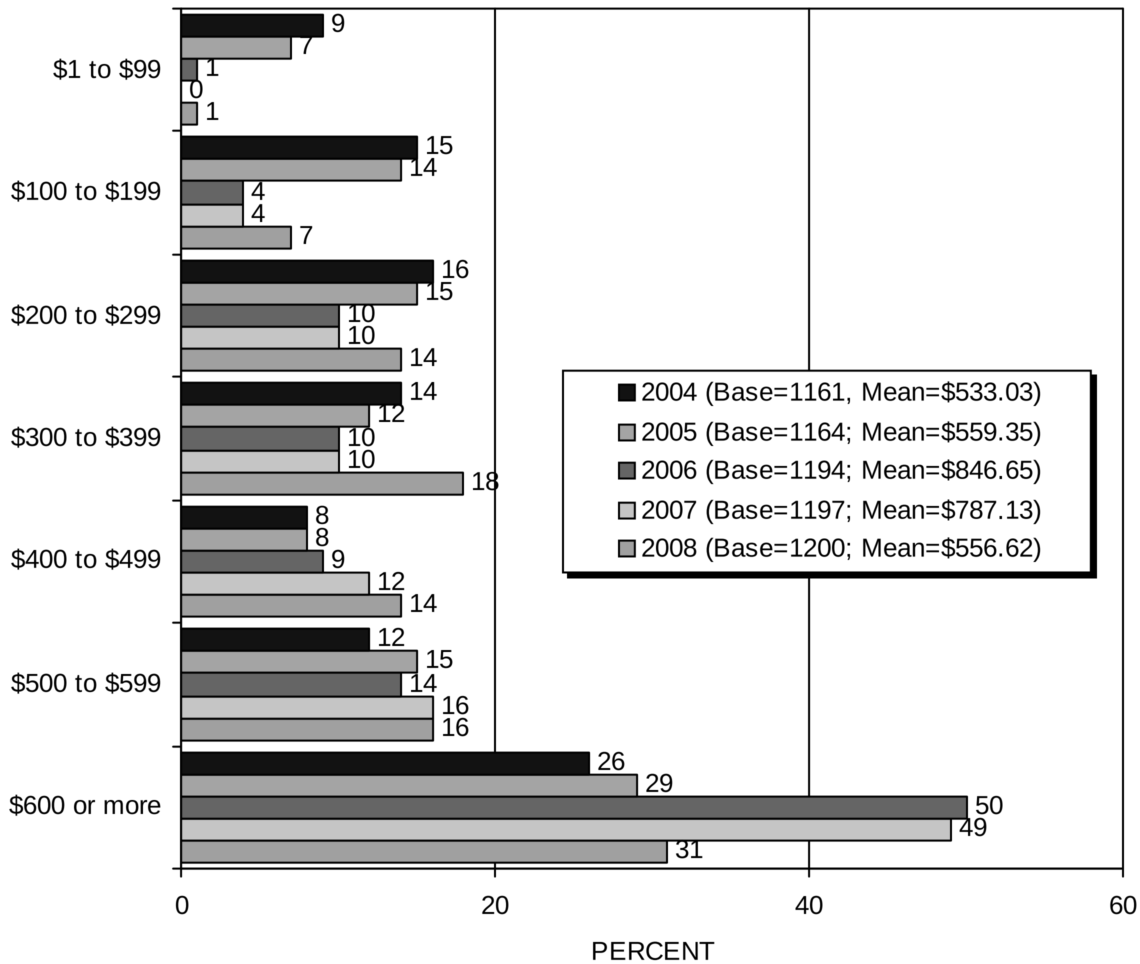
As Figure 60 shows, those who played table games most often in 2008 were most likely to say they played games with a $5.00 minimum (66%, up from 2004 to 2006). Seventeen percent (17%) played games with a $10.00 or greater minimum, up from 12% in 2005. Two percent (2%) played $1.00 minimum tables (a significant decrease from 11% in 2005), while 5% played a $2.00 minimum (down from 2004 and 2005).

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



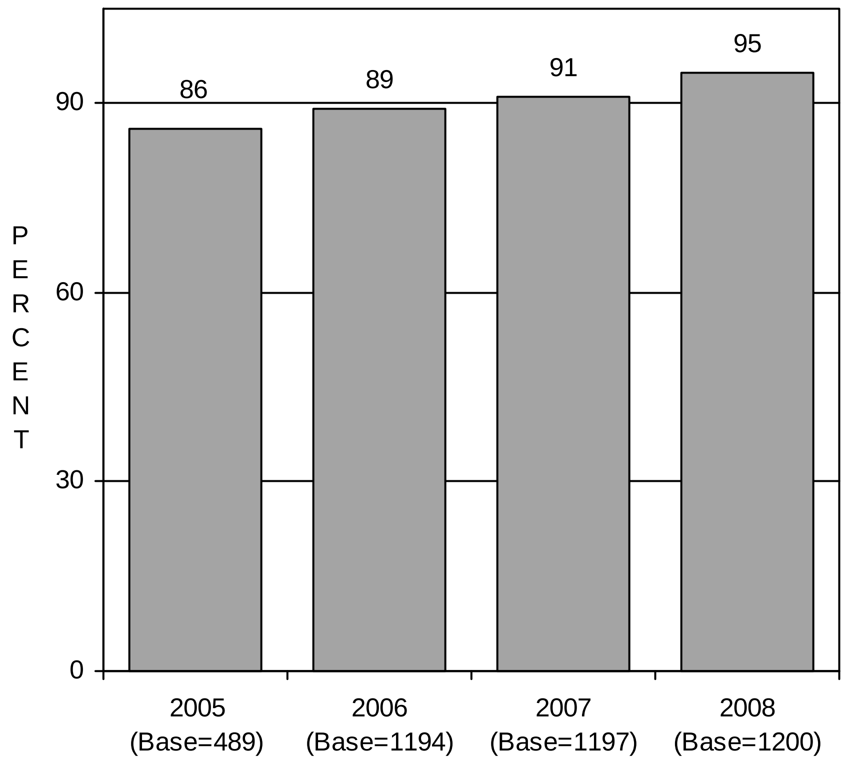
We asked those who played table games about the size of their usual bet (Figure 61). The current average bet is $10.37, up significantly from $4.85 last year and $7.47 in 2006. Forty-six percent (46%) said their average bet was from $10 to $20, a significant increase from 17% last year and 27% in 2006. The proportion of table games players who said they bet $1 to $3 stands at 4%, down significantly from 38% last year and 35% in 2006.

FIGURE 62
Trip Gambling Budget
(Among Those Who Gambled)



The average gambling budget reported by visitors to Laughlin was $556.62, similar to 2004 and 2005 averages, but down significantly from $787.13 last year and $846.65 in 2006 (Figure 62).

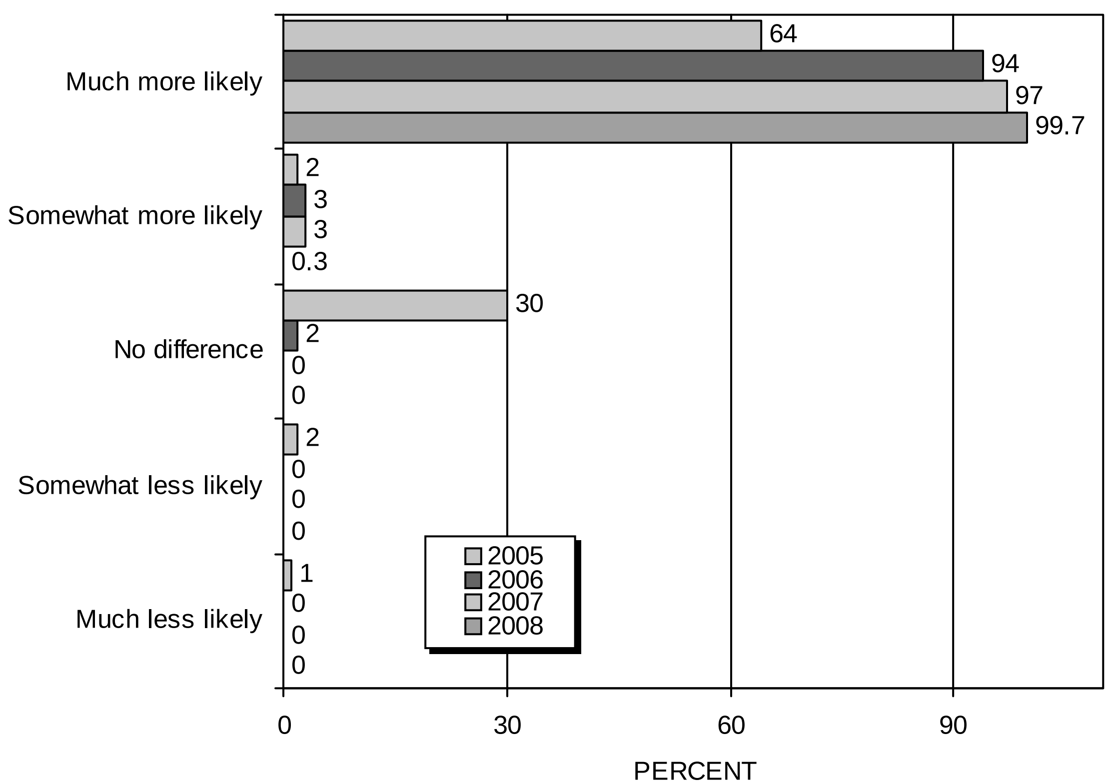
FIGURE 63
Whether Member Of A Slot/Loyalty Club*



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. Almost all 2008 gamblers (95%) said they were (Figure 63), up significantly from each of the past three years.

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

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

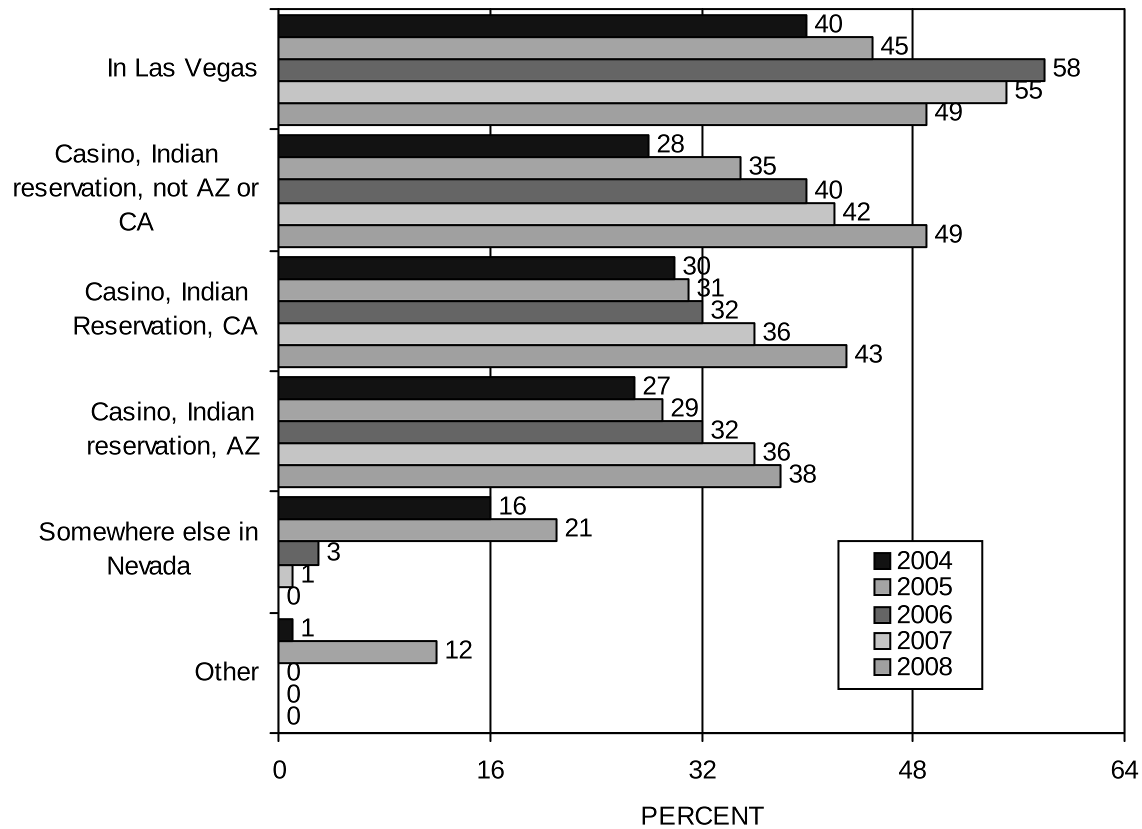


Beginning in 2005, all visitors to Laughlin were asked the following:

> "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?"

Almost all 2008 visitors (99.7%) said that having other places to gamble made them *much more* likely to visit Laughlin (Figure 64).

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



All visitors were asked about any gambling they had done at specific locations outside Laughlin within the past 12 months (Figure 65). About one-half (49%) of Laughlin visitors in 2008 reported gambling recently in Las Vegas, an increase from 40% in 2004 and 45% in 2005, but down significantly from 58% in 2006 and 55% in 2007. About one-half (49%) gambled at an Indian reservation outside of Arizona or California, an increase over all prior years. Forty-three percent (43%) reported gambling at an Indian reservation in California, up significantly over all previous years. Almost four in ten (38%) said they gambled at an Indian reservation in Arizona (up from 27% in 2004, 29% in 2005, and 32% in 2006).

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

Almost all visitors (96%) said they were "very satisfied" with their visit to Laughlin in the 2008 survey (Figure 66), up from 94% in 2004. Only 4% said they were "somewhat satisfied" with their visit.

FIGURE 66
Satisfaction With Visit

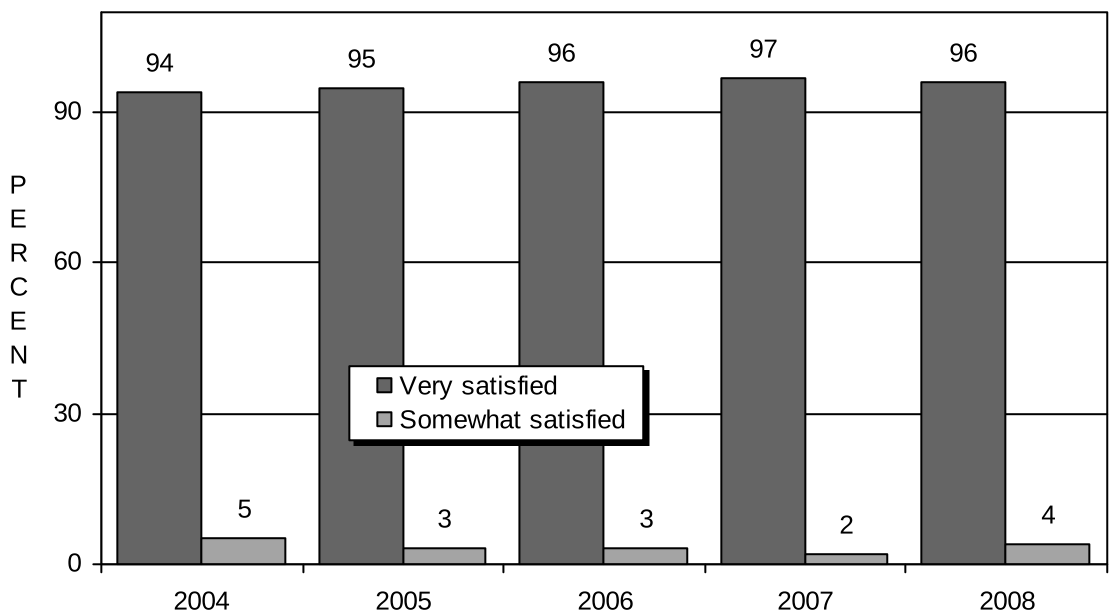
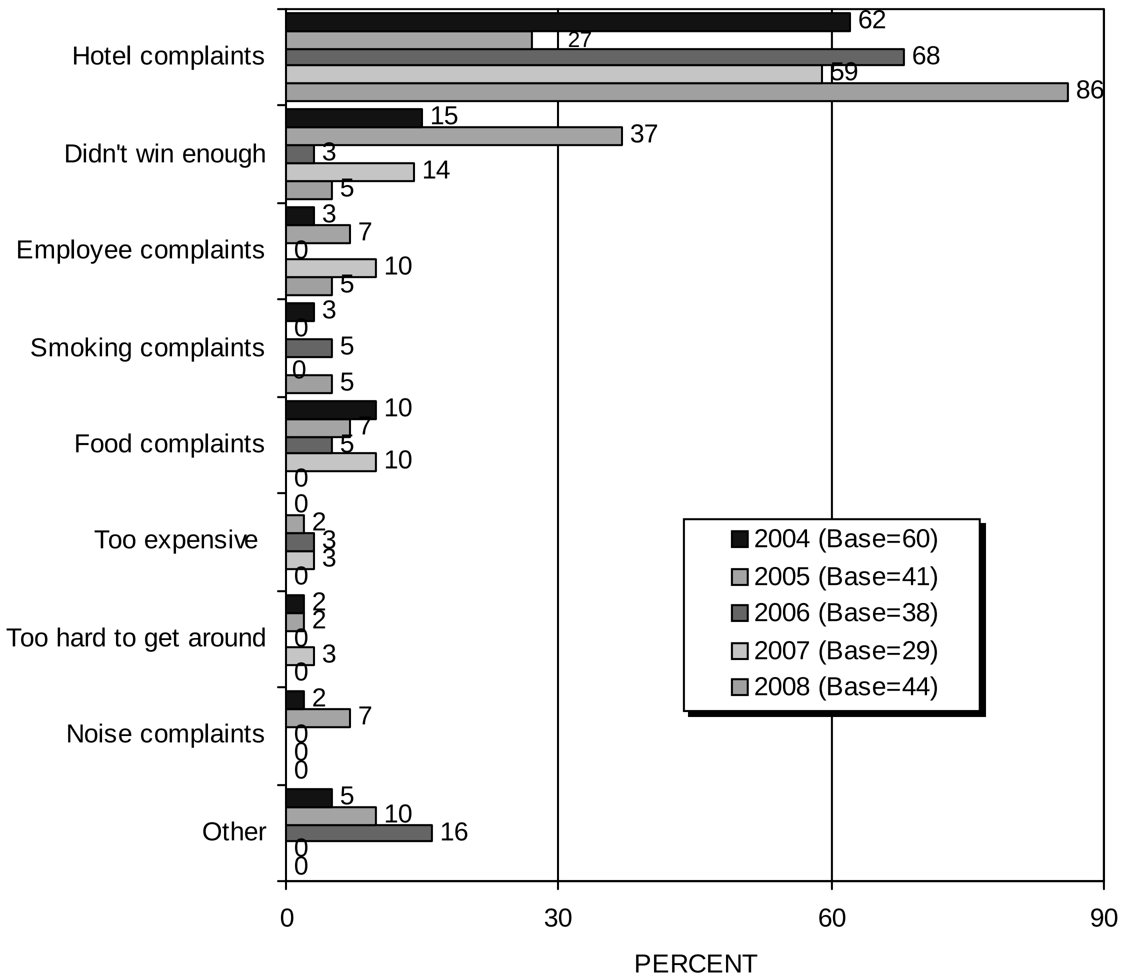
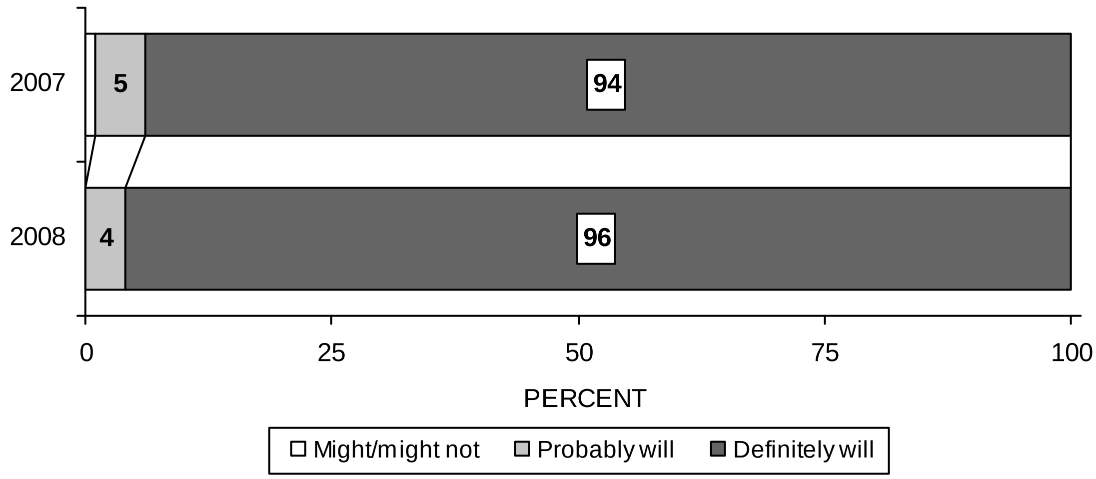


FIGURE 67
Why Not "Very" Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



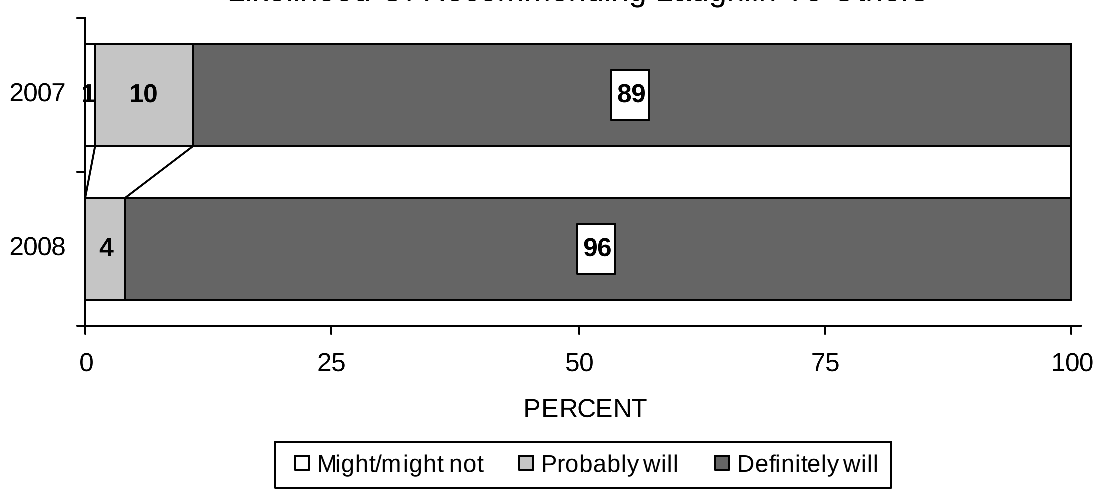
Those who were "somewhat" satisfied were asked why they were not "very" satisfied (Figure 67). Of the 44 visitors in this category, most (86%) expressed complaints with their hotels, up significantly from all prior years. Five percent (5%) mentioned not wining enough money gambling, down from 37% in 2005. Another 5% complained about employees, and 5% had smoking complaints.

FIGURE 68
Likelihood Of Returning To Laughlin Next Year



Visitors were asked for the first time in 2007 how likely they are to return to Laughlin next year (Figure 68) Almost all (96%) said they were “very likely” to return, up significantly from 94% in 2007.

FIGURE 69
Likelihood Of Recommending Laughlin To Others



Visitors were asked for the first time in 2007 how likely they are to recommend Laughlin to others (Figure 69). Almost all (96%) said they “definitely will” recommend Laughlin to others, up significantly from 89% last year.

VISITOR DEMOGRAPHICS

As Figures 70 and 71 show, 2008 visitors were most likely to be married (78%) and white (88%). Three in ten visitors are from Southern California (30%, down from 39% in 2004), and 4% were foreign visitors (down from 7% in 2006 and 6% in 2007). Forty-four percent (44%) were 65 or older. Visitors are still more likely to be retired (52%, down significantly from 59% in both 2004 and 2005) than employed (45%, up from 38% in 2004 and 35% in 2005). The largest proportion of visitors have a high school diploma or less (45%, up from 39% in 2005 and 40% in 2004). More than one-half (51%) have a household income of less than $60,000, while 48% have incomes of $60,000 or more (up from 35% in both 2004 and 2005).

FIGURE 70
VISITOR DEMOGRAPHICS

	YEAR 2004	YEAR 2005	YEAR 2006	YEAR 2007	YEAR 2008
GENDER					
Male	50%	50%	50%	51%	51%
Female	50	50	50	49	49
MARITAL STATUS					
Married	77	77	76	78	78
Single	8	9	8	7	9
Separated/divorced	7	6	6	6	5
Widowed	9	8	9	8	7
EMPLOYMENT					
Employed	38	35	45	43	45
Unemployed	1	1	0	0	1
Student	0	1	0	0	0
Retired	59	59	53	54	52
Homemaker	3	5	2	3	3
EDUCATION					
High school or less	40	39	44	44	45
Some college	33	32	30	35	33
College graduate	26	26	23	20	21
Trade/vocational school	2	4	3	1	1
AGE					
21 to 29	2	2	2	2	2
30 to 39	7	6	6	5	5
40 to 49	12	11	14	12	13
50 to 59	20	21	21	21	23
60 to 64	14	17	14	16	14
65 or older	45	44	44	44	44
MEAN	60.4	60.9	60.3	60.9	60.8
BASE	(1200)	(1200)	(1200)	(1200)	(1200)

FIGURE 71
VISITOR DEMOGRAPHICS
(Continued/2)

	YEAR 2004	YEAR 2005	YEAR 2006	YEAR 2007	YEAR 2008
ETHNICITY					
White	86%	89%	88%	85%	88%
African-American/Black	3	3	2	1	2
Asian/Asian American	1	1	1	2	1
Hispanic/Latino	9	6	8	10	9
Other	1	2	2	1	0
HOUSEHOLD INCOME					
Less than $20,000	5	5	2	2	2
$20,000 to $39,999	19	17	20	20	16
$40,000 to $59,999	25	20	27	34	33
$60,000 to $79,999	15	16	20	19	22
$80,000 or more	20	19	25	24	26
Not sure/no answer	17	23	7	2	2
VISITOR ORIGIN					
U.S.A.	96	96	94	94	96
Eastern states*	2	3	2	3	2
Southern states†	6	7	8	7	6
Midwestern states‡	11	12	14	13	18
Western states§	77	75	69	70	71
California	41	36	33	32	33
Southern California	39	34	31	30	30
Northern California	2	2	2	2	2
Arizona	22	24	21	23	24
Other West	14	15	14	15	15
No ZIP code given	0	0	0	0	0
Foreign	4	4	7	6	4
BASE	(1200)	(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%

FEMALE.......................49

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 .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

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 .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

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

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

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

FIRST VISIT 12%	**SKIP TO A6 ON PAGE 3**
VISITED BEFORE.88 NOT SURE/DK ....0 REFUSED/NA..........0	**ASK A2**

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.)**

10.37 MEAN (ALL VISITORS)
11.60 MEAN (REPEAT VISITORS) (N=1061)

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

2.31 MEAN (ALL VISITORS)
2.48 MEAN (REPEAT VISITORS) (N=1061)

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

(N=1061)

YES	46%
NO	54
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=1061)

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW	1%
VACATION/PLEASURE	50
TO GAMBLE	31
VISIT FRIENDS/RELATIVES	9
TO ATTEND A SPECIAL EVENT (E.G., DESERT CHALLENGE, A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)	1
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	1
OTHER BUSINESS PURPOSES	1
WATER-BASED RECREATION	2
JUST PASSING THROUGH	3
NOT SURE/DK	0
REFUSED/NA	0

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

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW	1%
VACATION/PLEASURE	36
TO GAMBLE	47
VISIT FRIENDS/RELATIVES	11
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	1
OTHER BUSINESS PURPOSES	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	14%
NO	86
NOT SURE/DK	0
REFUSED/NA	0

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

Air	14%
Bus (IF "YES" ASK, "Do you mean...":)	
Regularly scheduled bus service like Greyhound	2
Or a chartered or escorted bus service or bus tour	3
Truck	1
Automobile	78
Motorcycle	0
Recreational Vehicle (RV)	3
REFUSED/NA	0

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

SAME DAY	2%
1-3 DAYS BEFORE	9
4-6 DAYS BEFORE	1
7-14 DAYS BEFORE	31
15-30 DAYS BEFORE	30
31-60 DAYS BEFORE	16
61-90 DAYS BEFORE	5
MORE THAN 90 DAYS BEFORE	6
NOT SURE/DK	0
REFUSED/NA	0

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

YES 3%	**SKIP TO B4**
NO 97	**ASK B3a**
NOT SURE/DK.....0 REFUSED/NA 0	**SKIP TO B4a**

B3a. What is the MAIN reason you did not use a travel agent to help you plan your trip? **(ACCEPT ONLY ONE RESPONSE.)** (N=1160)

CALLED 800# 82%
USED THE INTERNET 7
LAST MINUTE DECISION/NO TIME 4
PREFER TO MAKE MY OWN PLANS 2
ANOTHER PERSON MADE PLANS 2
GOT INVITE FROM HOTEL/CAINO........2
BUSINESS/COMPANY MADE PLANS....1
ALL OTHER MENTIONS 1

AFTER ASKING B3a, SKIP TO B4a

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

(ASK ONLY OF THOSE WHO SAID "YES" IN B3.)
B4. Did the travel agent... **(READ LIST)**
(N=40)

	YES	NO	DON'T KNOW	RE-FUSED
Influence your decision to visit Laughlin?	5%	95%	0%	0%
Influence your choice of accommodations?.................	95	5	0	0
"Book" your accommodations?	100	0	0	0
"Book" your transportation?	95	5	0	0

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

YES 8%	**ASK B4b**
NO .... 92 NOT SURE/DK.......0 REFUSED/NA 0	**SKIP TO B5**

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

B4b. **(ASK OF RESPONDENTS WHO SAID "YES" IN B4a.)**
Did you use the Internet to... **(READ LIST)**
(N=86)

	YES	NO	DON'T KNOW	RE-FUSED
"Book" your accommodations?	98%	2%	0%	0%
"Book" your transportation?	8	87	0	6

B4c. Did you find information on the Internet that... **(READ LIST)**
(N=8)

	YES	NO	DON'T KNOW	RE-FUSED
Influenced your decision to visit Laughlin?	1%	93%	0%	6%
Influenced your choice of accommodations?...............	64	31	0	6

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

AMONG ALL RESPONDENTS:	Before Leaving Home	While En Route To Laughlin	After Arrival	DOES NOT APPLY	DON'T KNOW	RE-FUSED
				DO *NOT* READ THESE RESPONSE CODES		
a. Where you would stay?	94%	1%	5%	0%	0%	0%
b. Where you would gamble?	92	2	6	0	0	0
c. Which shows you would see?	35	1	12	52	0	0

AMONG THOSE TO WHOM THE QUESTION APPLIES:	Before Leaving Home	While En Route To Laughlin	After Arrival	DK/NA	
a. Where you would stay?	94%	1%	5%	0%	(N=1200)
b. Where you would gamble?	92	2	6	0	(N=1200)
c. Which shows you would see?	73	2	24	0	(N=575)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

FROM PERMANENT RESIDENCE 91%	**SKIP TO C1**
FROM ANOTHER LOCATION 9	**ASK B7**
NOT SURE/DK .... 0 REFUSED/NA 0	**SKIP TO C1**

B7. Where are you traveling from? **(PROBE FOR LOCATION IMMEDIATELY PRIOR TO LAUGHLIN VISIT.)** (N=108)

LAS VEGAS 77%	**ASK B7a**
ARIZONA .... 15 CALIFORNIA .... 3 OTHER .... 6 NOT SURE/DK .... 0 REFUSED/NA 0	**SKIP TO C1**

B7a. Did you travel to Las Vegas by... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=83)

Air........ 95%

Automobile, truck, RV, bus 5

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	98%
MOTEL	0
RV PARK	2
FRIENDS/RELATIVES	0
DAYTRIP/OTHER	0

LOCATION OF LODGING

LAUGHLIN	98%
BULLHEAD CITY	0
LOCATION COULD NOT BE DETERMINED	2

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

HOTEL	98%
MOTEL	0
RV PARK	2
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.. 82%
b. Booked through a travel agent (either in person or by phone)........3
c. Booked by phone but not by calling the hotel directly and not through a travel agent 1
d. Booked at a website on the Internet 7
e. Booked in person at the hotel, motel, or RV park 5
f. The trip was a gift, prize, or incentive, so the accommodations were booked for you 1
g. Not sure because someone else in your party booked the hotel and you don't know how they did it.......0

OTHER..0
REFUSED/NA 0

C1b. **(IF RESPONSE "d" IN C1b IS CHOSEN, ASK:)** Which Web site did you use to book your accommodations? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).** (N=89)

AOL (AMERICA ONLINE).................. 3%
EXPEDIA.COM 8
HOTWIRE.COM 1
ORBITZ 1
PRICELINE.COM 2
TRAVELOCITY 10
YAHOO 1
HOTEL WEB SITE (ANY).. 70
OTHER... 2
NOT SURE/DK.................................. 0
REFUSED/NA 1

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............8
4-6 DAYS BEFORE............1
7-14 DAYS BEFORE........30
15-30 DAYS BEFORE......29
31-60 DAYS BEFORE......15
61-90 DAYS BEFORE........5
MORE THAN 90 DAYS BEFORE 6
NOT SURE/DK 0
REFUSED/NA.....................0

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

C3. Including yourself, how many people stayed in your room? (N=1180)

ONE 9%
TWO 85
THREE................................4
FOUR OR MORE 2
REFUSED/NA.....................0
1.99 MEAN

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

C5. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=1180)

HOTEL/AIRLINE PACKAGE DEAL..........14% HOTEL/AMENITIES PACKAGE DEAL...........1 TOUR/ TRAVEL GROUP 0	**ASK C6**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE.............35 REGULAR FULL-PRICE ROOM RATE......6	**SKIP TO C8**
CASINO COMPLIMENTARY......44	**SKIP TO C9**
ANOTHER RATE ....1 NOT SURE/DK...............0 REFUSED/NA 0	**SKIP TO C8**

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

(N=177)

$0 - $49 ....3%
$50 - $99 17
$100 - $149 9
$150 OR MORE 71
NOT SURE/REFUSED ...0
$220.97 MEAN
$229.00 MEDIAN

C6a. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=177)

OUTDOOR BILLBOARD 0%
BROCHURE 2
E-MAIL OFFER.................................. 5
INTERNET AD (POP-UP OR BANNER AD) 1
OFFER RECEIVED IN THE MAIL.... 44
NEWSPAPER.................................. 12
RADIO 1
RESERVATION AGENT/ CALL CENTER.................................. 2
TELEVISION...................................... 0
TRAVEL AGENT 19
ANY WEB SITE 1
WORD-OF-MOUTH.......................... 13
OTHER 0
NOT SURE/DK 0
REFUSED/NA.................................... 0

SKIP TO C9

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

(N=488)

$0 - $24............................. 13%
$25 - $49............................ 65
$50 OR MORE................... 22
NOT SURE/NO ANSWER... 1
$39.95 MEAN
$35.00 MEDIAN

C8a. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=488)

OUTDOOR BILLBOARD..................0%
BROCHURE.....................................1
E-MAIL OFFER 1
INTERNET AD (POP-UP OR BANNER AD)............................11
OFFER RECEIVED IN THE MAIL ..50
NEWSPAPER 3
RADIO 0
RESERVATION AGENT/ CALL CENTER................................21
TRAVEL AGENT 0
ANY WEB SITE.................................1
WORD-OF-MOUTH 12
OTHER 0
NOT SURE/DK.................................0
REFUSED/NA 0

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

(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)

1......................................7%
2....................................78
3......................................5
4......................................6
5 OR MORE 4
2.25 MEAN
2.00 MEDIAN

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

YES 2%	**ASK C11**
NO .... 98 NOT SURE/DK................ 0 REFUSED/NA 0	**SKIP TO C12**

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

DAYTRIP 0%
1... 6
2... 33
3... 34
4... 17
5 OR MORE........................... 10
3.03 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... 6
3... 33
4... 34
5... 17
6 OR MORE........................... 10
4.03 MEAN
4.00 MEDIAN

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

SUNDAY................................ 19%
MONDAY 15
TUESDAY.............................. 15
WEDNESDAY.......................... 9
THURSDAY 13
FRIDAY.................................. 15
SATURDAY 14
REFUSED/NA.......................... 0

D1. Have you gambled during this visit to Laughlin?

YES 100%	**ASK D2**
NO ....0 NOT SURE/DK........0 REFUSED/NA 0	**SKIP TO D12 ON PAGE 10**

D2. On average, how many hours *PER DAY* did you spend gambling? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?") (N=1200)

1 TO 2 HOURS 10%
3 TO 4 HOURS 26
5 TO 6 HOURS 30
7 TO 8 HOURS 20
9 TO 10 HOURS 9
MORE THAN 10 HOURS........... 5
5.81 MEAN
6.00 MEDIAN

D3. How many different casinos have you gambled at during your stay in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)** (N=1200)

1... 62%
2... 27
3... 7
4... 3
5 TO 6.. 2
MORE THAN 6........................... 0
1.57 MEAN
1.00 MEDIAN

D4. Which type of casino game do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=1200)

SLOT MACHINES ..... 60% VIDEO POKER.......... 19 OTHER VIDEO MACHINES (21, KENO, ETC.) 2	**ASK D5**
BACCARAT .... 0 BIG 6........................... 0	**SKIP TO D7**
BINGO 0	**SKIP TO D10**
BLACKJACK................ 8 CARIBBEAN STUD POKER .... 0 CRAPS 2	**SKIP TO D7**
KENO.......................... 1	**SKIP TO D10**
POKER 4	**SKIP TO D7**
RACE/SPORTS-BOOK 2	**SKIP TO D10**
ROULETTE................. 1	**SKIP TO D7**
OTHER .... 0 NOT SURE/DK .... 0 REFUSED/NA............. 0	**SKIP TO D10**

★ ★ ★ ★ ★ ★ ★ ★ ★

D5. Which denomination machine do you play *MOST OFTEN*. **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=975)

PENNY 37%
NICKEL..............................16
DIME 0
QUARTER 38
HALF DOLLAR 0
DOLLAR 8
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=975)

1-2 ....5%
3..16
4-5 40
6 OR MORE 39
REFUSED/NO ANSWER.....0
23.86 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=184)

LESS THAN $1.00 ....0%
$1.00....................................2
$2.00....................................5
$3.00-$4.00 11
$5.00..................................65
$10.00 17
$25.00 0
$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=184)

$1 - $3 ....4%
$4 - $9 44
$10 - $20 456
OVER $20 7
DON'T KNOW/NA 0
$10.37 MEAN
$10.00 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=1200)

$1 - $99...................................1%
$100 - $199.............................7
$200 - $299............................14
$300 - $399............................18
$400 - $499............................14
$500 - $599............................16
$600 OR MORE.....................31
NOT SURE/NO ANSWER.......0
$556.62 MEAN
$400.00 MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=1200)

YES.......................................95%
NO 5
NOT SURE/DK 0
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........ 43
B. At a casino on an Indian reservation in Arizona........... 38
C. At a casino on an Indian reservation outside Arizona or California............. 49
I. In Las Vegas, Nevada 49
J. Somewhere else in Nevada (outside the Laughlin area)......................... 0
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.............. 99.7%
SOMEWHAT MORE LIKELY.........0.3
NO DIFFERENCE..........................0.1
SOMEWHAT LESS LIKELY...........0
MUCH LESS LIKELY.....................0
NOT SURE/DK...............................0
REFUSED/NA................................0
5.00 MEAN

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

YES 71%
NO 29
NOT SURE/DK..................0
REFUSED/NA...................0

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

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

YES...................... 13%	**ASK B13**
NO .... 87 NOT SURE/DK...... 0 REFUSED/NA........ 0	**SKIP TO B14**

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

(N=155)

A. Downtown Las Vegas (that is, the area on or near Fremont Street)?......... 26%
B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?......................... 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.........................8%	**ASK B15**
NO .... 93 NOT SURE/DK...... 0 REFUSED/NA........ 0	**SKIP TO C15**

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

(N=90)

Hoover Dam?............................ 11%
Lake Mead?................................ 3
Lake Havasu/ Colorado River? 39
Lake Mojave/ Davis Dam? 2
Grand Canyon? 1
Bryce Canyon? 0
Zion National Park?..................... 1
Oatman, Arizona?...................... 47
Other?...................................... 12

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.)**

$192.89 MEAN (INCLUDING $0)
$193.05 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.)**

$29.46 MEAN (INCLUDING $0)
$189.03 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) .... $32.53 MEAN (INCLUDING $0)
$94.51 MEAN (EXCLUDING $0)

B. Shows/entertainment (not including gambling) .... $3.01 MEAN (INCLUDING $0)
$35.44 MEAN (EXCLUDING $0)

C. Sightseeing .... $0.01 MEAN (INCLUDING $0)
$10.00 MEAN (EXCLUDING $0)

D. Other .... $0.04 MEAN (INCLUDING $0)
$50.00 MEAN (EXCLUDING $0)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

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

Very satisfied.................... 96%	**SKIP TO G1 ON PAGE 13**
Somewhat satisfied 4	**ASK F2**
Somewhat dissatisfied .... 0 Very dissatisfied 0	**SKIP TO F3**
<u>DO NOT READ</u> NOT SURE/DK................... 0 REFUSED/NA 0	**SKIP TO G1 ON PAGE 13**

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

(N=44)

HOTEL COMPLAINTS.......................... 86%
DIDN'T WIN ENOUGH MONEY 5
EMPLOYEE COMPLAINTS.................... 5
SMOKING COMPLAINTS...................... 5

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=5)

HOTEL COMPLAINTS.......................... 60%
NOISE COMPLAINTS........................... 20
TOO EXPENSIVE................................. 20

F4. **(ASK EVERYONE:)**
How likely will you be to return to Laughlin in the <u>next year</u>? Would you say you… **(READ FIRST 5 RESPONSES)**

Definitely will................................96%
Probably will 4
Might/might not..............................0
Probably will not 0
Definitely will not............................0
NOT SURE/NO ANSWER 0

F5. How likely will you be to recommend Laughliln to friends, relatives, and co-workers as a destination for a vacation or pleasure trip? Would you say you… **(READ FIRST 5 RESPONSES)**

Definitely will recommend............96%
Probably will recommend 4
Might/might not recommend..........1
Probably will not recommend 0
Definitely will not recommend 0
NOT SURE/NO ANSWER.............0

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

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

Employed 45%	**ASK G2**
Unemployed ....1 Student ....0 Retired ....52 Homemaker 3	**SKIP TO G3**
<u>DO NOT READ</u> REFUSED/NA 0	**SKIP TO G3**

G2. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS <u>NOT</u> AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=513)

SALES/CLERICAL WORKERS .. 29%

SERVICE WORKERS 21

MANAGERS/OFFICIALS/ PROPRIETORS 20

PROFESSIONAL/TECHNICAL... 19

CRAFT WORKERS/FOREMEN.... 9

OTHER 2

REFUSED/NO ANSWER 1

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

GRADE SCHOOL OR SOME HIGH SCHOOL 1%

HIGH SCHOOL DIPLOMA (FINISHED GRADE 12) 44

SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 33

GRADUATED COLLEGE............. 19

GRADUATE SCHOOL (MASTER'S OR PH.D.).................. 2

TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 1

REFUSED/NA 0

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

Married......................................78%

Single 9

Separated or divorced 5

Widowed 7

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

G5. What country do you live in?

USA 96%	**ASK G6**
FOREIGN 4	**SKIP TO G7**
REFUSED/NA................... 0	**SKIP TO G7**

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

EAST 2%

SOUTH 6

MIDWEST 18

WEST 71

CALIFORNIA 33

ARIZONA 24

OTHER WEST 15

FOREIGN VISITORS 4

NO ZIP CODE GIVEN......................0

G7. **(ETHNICITY BY OBSERVATION. IF UNSURE, ASK:)**
Most people think of themselves as belonging to a particular ethnic or racial group. What ethnic or racial group are you a member of? (ASK ONLY IF NECESSARY: Are you white, Black, Asian, Hispanic or Latino -- or of some other ethnic or racial background?)

WHITE	88%
BLACK OR AFRICAN AMERICAN	2
ASIAN OR ASIAN AMERICAN	1
HISPANIC/LATINO	9
NATIVE AMERICAN	0
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*.)**

60.81 MEAN
62.00 MEDIAN

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

21 to 29	2%
30 to 39	5
40 to 49	13
50 to 59	23
60 to 64	14
65 and older	44
REFUSED/NA	0

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

A. Less than $20,000	2%
B. $20,000 to $29,999	4
C. $30,000 to $39,999	12
D. $40,000 to $49,999	17
E. $50,000 to $59,999	16
F. $60,000 to $69,999	12
G. $70,000 to $79,999	10
H. $80,000 to $89,999	8
I. $90,000 to $99,999	4
J. $100,000 to $149,999	14
K. $150,000 or more	0
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/AMENTIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)**
   One price that includes your hotel room ***and*** other items such as shows, meals, or other amenities, but ***does not*** include airfare or bus transportation to Las Vegas.

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

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

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

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

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

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

INCOME CATEGORIES

A. Less than $20,000

B. $20,000 to $29,999

C. $30,000 to $39,999

D. $40,000 to $49,999

E. $50,000 to $59,999

F. $60,000 to $69,999

G. $70,000 to $79,999

H. $80,000 to $89,999

I. $90,000 to $99,999

J. $100,000 to $149,999

K. $150,000 or more

IT'S LIKE YOU OWN THE PLACE

Laughlin Visitors Bureau
1555 South Casino Drive, P.O. Box 502
Laughlin, NV 89029-1502

VisitLaughlin.com

A Division of the
Las Vegas Convention and Visitors Authority
3150 Paradise Road, Las Vegas, NV 89109-9096
VisitLasVegas.com

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