


2009 Laughlin

Visitor Profile Study

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LAUGHLIN VISITOR PROFILE

Calendar Year 2009

Annual Report

January 1, 2009 to December 31, 2009

Prepared for:

Laughlin Visitors Bureau
A Division Of The
Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

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

VISITOR PROFILE STUDY

LAS VEGAS CONVENTION AND VISITORS AUTHORITY
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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, 2009 to December 31, 2009. Approximately one hundred (100) in-person interviews were conducted per month in or near Laughlin hotel-casinos and hotels.

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

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

REASONS FOR VISITING

Nineteen percent (19%) of visitors were first-time visitors to Laughlin, significantly higher than 2005 to 2008 results. Among first-time visitors, 54% said their primary reason for visiting Laughlin was vacation or pleasure (down from 72% in 2005), while 13% mentioned gambling. Among repeat visitors, 27% mentioned vacation or pleasure as their primary reason for their current visit (down from past years), while gambling was cited by 49% (up from 2005 to 2007). The average number of Laughlin visits among all visitors in the past year was 2.3, down from 2005 and 2006, while among repeat visitors it was 2.6, down from 2005. The average number of visits among all visitors in the past five years was 10.2 (down from 2005), while among repeat visitors it was 12.3.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2005	2006	2007	2008	2009
Proportion of visitors who were first-time visitors	15%	15%	14%	12%	19%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	72%	58%	63%	58%	54%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	8%	18%	12%	14%	13%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	55%	47%	44%	33%	27%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	24%	36%	41%	51%	49%
Average number of visits in past five years (all visitors)	11.5	10.5	10.2	10.4	10.2
Average number of visits in past five years (repeat visitors)	13.3	12.1	11.7	11.6	12.3
Average number of visits in past year (all visitors)	3.2	2.5	2.3	2.3	2.3
Average number of visits in past year (repeat visitors)	3.6	2.8	2.5	2.5	2.6

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (86%), though more arrived by air (14%) than in 2005. More than nine in ten visitors (93%) arrived in Laughlin directly from their permanent residences, up from 2005 and 2006. As in the past, most visitors decided where to stay in Laughlin before arriving in Laughlin (95%). Nearly all visitors (87%) who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin. Four in ten (40%) of visitors who saw shows decided what shows to see *before* arriving in Laughlin. One percent (1%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2009 (down from 2005 to 2008), while 15% said they used the Internet to plan their trip (up from 2005 to 2008). Twenty-one percent (21%) of Laughlin visitors visited Las Vegas on their current trip to Laughlin, up from 2007 and 2008. Sixteen percent (16%) toured other nearby places, up significantly from 2006 to 2008.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2005	2006	2007	2008	2009
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/RV)	93%	88%	87%	87%	86%
Proportion of visitors who traveled to Laughlin by air	7%	12%	13%	14%	14%
Proportion of visitors who traveled to Laughlin from their permanent residence	75%	89%	93%	91%	93%
Proportion of visitors who decided where to stay in Laughlin before arrival	93%	94%	95%	95%	95%
Proportion of visitors who decided where to gamble in Laughlin before arrival	64%	87%	94%	94%	87%
Proportion of visitors who decided which shows to see in Laughlin before arrival	34%	13%	52%	75%	40%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	2%	8%	5%	3%	1%
Proportion of visitors who used the Internet in planning their trip to Laughlin	11%	13%	7%	8%	15%
Proportion of visitors who have visited Las Vegas in the past five years	78%	74%	75%	71%	71%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	20%	20%	17%	13%	21%
Proportion of visitors who toured nearby places	22%	7%	2%	8%	16%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.5, up from prior readings. Seven percent (7%) had people under the age of 21 in their immediate party, up from 2006 to 2008. Their stay averaged 3.1 nights and 4.1 days. Ninety-seven percent (97%) of visitors who stayed overnight lodged in a hotel or motel (down from 2007 and 2008), with an average of 2.0 room occupants. Non-package overnight visitors who stayed in a hotel or motel spent an average of $38.53 for their room, similar to last year, but down significantly from $40.89 in 2006 and $41.76 in 2007. Thirteen percent (13%) of visitors who stayed in a hotel or motel paid a package/tour group rate. The average package cost was $242.71, up from $189.55 in 2005. The average food and drink expenditures were $204.98 per trip, up significantly from $180.85 in 2005, $183.26 in 2007 and $192.89 last year. The average local transportation expenditures were $41.23 per trip, up significantly from all prior years. The average total spent on shopping in 2009 was $68.26, up significantly from all prior years. An average of $6.57 was spent on shows, and an average of $5.68 was spent on sightseeing, both figures higher than all prior years.

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2005	2006	2007	2008	2009
Average number of adults in immediate party	2.4	2.0	2.1	2.3	2.5
Proportion of visitors with persons under 21 in their immediate party	5%	3%	3%	2%	7%
Proportion of visitors who stayed overnight	98%	99%	100%	100%	99%
Days stayed (average)	4.1	4.1	4.0	4.0	4.1
Nights stayed (average)	3.1	3.1	3.0	3.0	3.1
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	96%	98%	99%	98%	97%
Number of room occupants (average)	2.0	2.0	2.0	2.0	2.0
Lodging expenditures (average per night — non-package)	$37.56	$40.89	$41.76	$39.95	$38.53
Proportion of visitors who bought a package or travel group trip	12%	12%	11%	15%	13%
Average cost of package per person (among package/tour group visitors)	$189.55	$223.80	$242.32	$220.97	$242.71
Average trip expenditures for food and drink	$180.85	$208.22	$183.26	$192.89	$204.98
Average trip expenditures for local transportation	$9.16	$3.78	$0.86	$29.46	$41.23
Average trip expenditures for shopping	$48.57	$45.24	$40.53	$32.53	$68.26
Average trip expenditures for shows	$3.97	$2.78	$2.40	$3.01	$6.57
Average trip expenditures for sightseeing	$1.75	$0.97	$0.27	$0.01	$5.68

GAMING BEHAVIOR AND BUDGETS

Nearly all visitors (99%) gambled while in Laughlin, an increase from 97% in 2005, though a significant decrease from 2007 and last year. Those who gambled budgeted an average of $511.17, down significantly from prior years. Gamblers spent an average of 5.8 hours a day gambling (down from 6.2 in 2006, but up from 5.6 hours in 2005), and gambled at an average of 2.1 casinos in 2009 (a significant decrease from 2.5 casinos in 2005 but up significantly from the average number of casinos in 2006 to 2008). About three in four gamblers (77%) played slot machines or video machines most often, down from 81% each in 2006 and 2008. Among these visitors, 39% played quarter machines most often (similar to last year, but down from 2005 to 2007), while 39% played penny machines (also similar to last year, but up significantly from 2006 to 2007). The average number of coins or tokens per play was 25.5, up significantly from 2005 to 2007. Nineteen percent (19%) played table games most often (up significantly from 15% last year). Among those who played table games most often, 82% typically played a $5.00 minimum (up from prior years), with an average bet of $11.30, up significantly from $7.47 in 2006 and $4.85 in 2007.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2005	2006	2007	2008	2009
Proportion who gambled while visiting Laughlin	97%	99.5%	99.8%	100%	99%
Average trip gambling budget (among those who gambled)	$559.35	$846.65	$787.13	$556.62	$511.17
Average hours per day spent gambling (among those who gambled)	5.6	6.2	5.9	5.8	5.8
Average number of different casinos gambled (among those who gambled)	2.5	1.4	1.5	1.6	2.1
Proportion who played slot/video machines most often (among those who gambled)	79%	81%	77%	81%	77%
Proportion who played quarter machines most often (among those who played machines)	54%	51%	45%	38%	39%
Proportion who played penny machines most often (among those who played machines)	NOT ASKED	17%	29%	37%	39%
Average number of coins/tokens per play (among those who played machines)	7.6	10.4	16.8	23.9	25.5
Proportion who played table games most often (among those who gambled)	18%	16%	17%	15%	19%
Proportion who played $5.00 table minimums most often (among those who played table games)	56%	55%	70%	65%	82%
Average bet (among those who played table games)	$12.21	$7.47	$4.85	$10.38	$11.30

ATTITUDINAL INFORMATION

The majority (92%) of visitors reported that they were “very satisfied” with their trip to Laughlin, though this was down from prior readings.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2005	2006	2007	2008	2009
Proportion who were “very satisfied” with their current trip to Laughlin	95%	96%	97%	96%	92%

VISITOR DEMOGRAPHICS

Three-quarters (76%) of visitors were married. One in three visitors were from Southern California (33%), and 6% were foreign visitors. Forty-seven percent (47%) were 65 or older. Visitors are still more likely to be retired (54%, although down significantly from 59% in 2005) than employed (42%, up from 35% in 2005). The largest proportion of visitors have a high school diploma or less (44%, up from 39% in 2005). More than one-half (55%) have a household income of less than $60,000 (up from 42% in 2005 and 49% in 2006).

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2005	2006	2007	2008	2009
Proportion of visitors who were married	77%	76%	78%	78%	76%
Proportion of visitors who were from Southern California	34%	31%	30%	30%	33%
Proportion of visitors who were foreign	4%	7%	6%	4%	6%
Proportion of visitors who were 50 years old or older	82%	79%	81%	81%	80%
Proportion of visitors 65 years old or older	44%	44%	44%	44%	47%
Average age	60.9	60.3	60.9	60.8	60.9
Proportion of visitors who were retired	59%	53%	54%	52%	54%
Proportion of visitors who were employed	35%	45%	43%	45%	42%
Proportion of visitors with a high school diploma or less	39%	44%	44%	45%	44%
Proportion of visitors with a household income less than $60,000	42%	49%	56%	51%	55%

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, 2009 and December 31, 2009 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2005	2006	2007	2008	2009
Days stayed (average)	4.1	4.1	4.0	4.0	4.1
Nights stayed (average)	3.1	3.1	3.0	3.0	3.1
Proportion of visitors who stayed overnight	98%	99%	100%	100%	99%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	96%	98%	99%	98%	97%
Lodging expenditures (average per night — non-package)	$37.56	$40.89	$41.76	$39.95	$38.53
Proportion of visitors who bought a package or travel group trip	12%	12%	11%	15%	13%
Average cost of package per person (among package/tour group visitors)	$189.55	$223.80	$242.32	$220.97	$242.71
Number of room occupants (average — hotel/motel only)	2.0	2.0	2.0	2.0	2.0
Average trip expenditures for food and drink	$180.85	$208.22	$183.26	$192.89	$204.98
Average trip expenditures for local transportation	$9.16	$3.78	$0.86	$29.46	$48.46
Average trip expenditures for shopping	$48.57	$45.24	$40.53	$32.53	$68.26
Average trip expenditures for shows	$3.97	$2.78	$2.40	$3.01	$6.57
Average trip expenditures for sightseeing	$1.75	$0.97	$0.27	$0.01	$8.21
Proportion who gambled while visiting Laughlin	97%	99.5%	99.8%	100%	99%
Average trip gambling budget (among those who gambled)	$559.35	$846.65	$787.13	$556.62	$511.17

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 2009. 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 2009 study and compares them to the results of the 2005, 2006, 2007 and 2008 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, 81% of visitors said they had visited Laughlin more than once, and 19% were first-time visitors (Figure 1). There were significantly fewer repeat visitors – and significantly more first-time visitors – in 2009 than in 2005 to 2008.

FIGURE 1
First Visit Vs. Repeat Visit

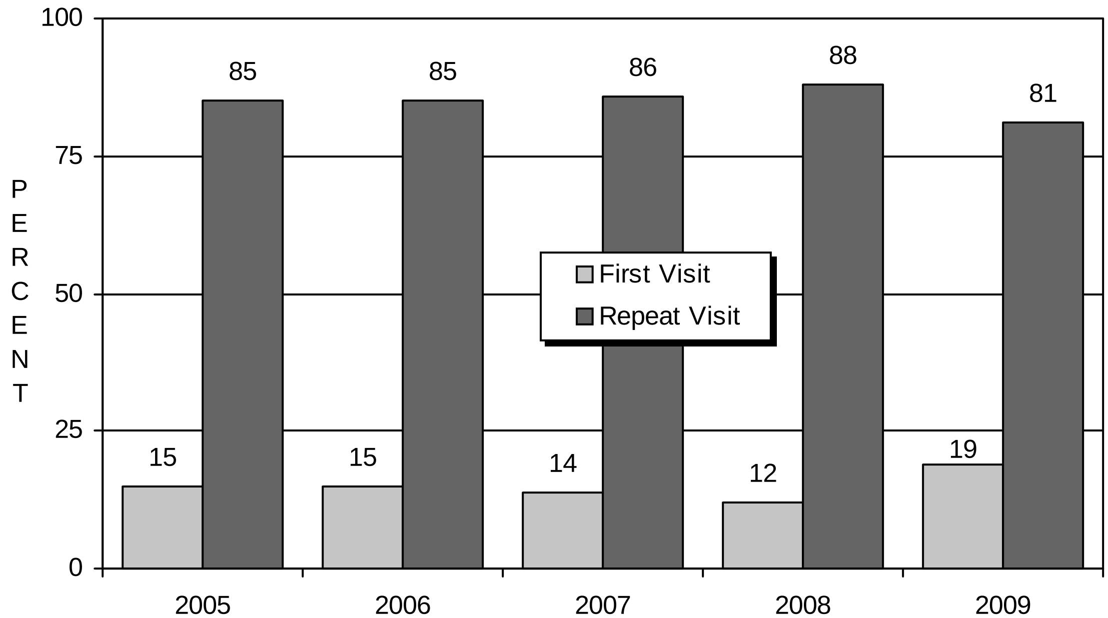
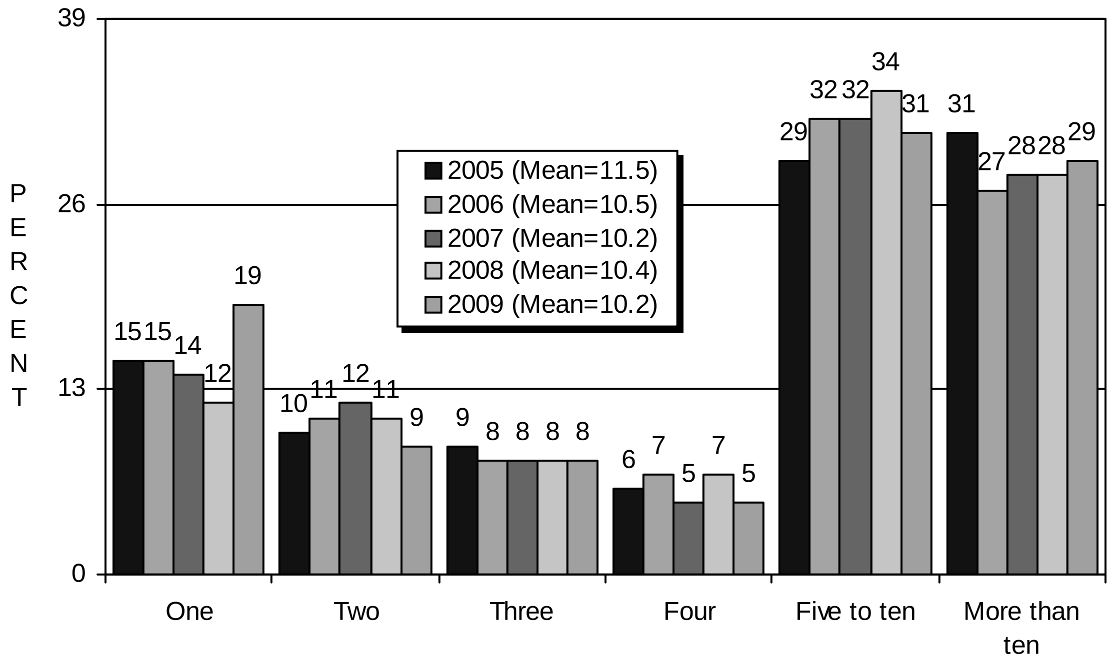
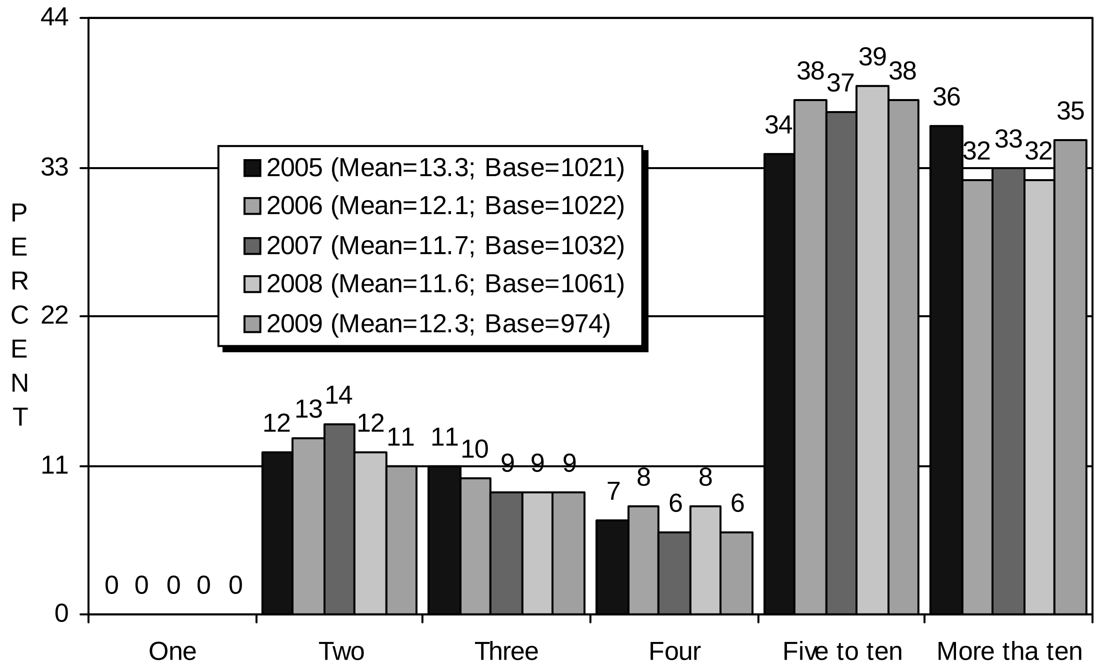


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



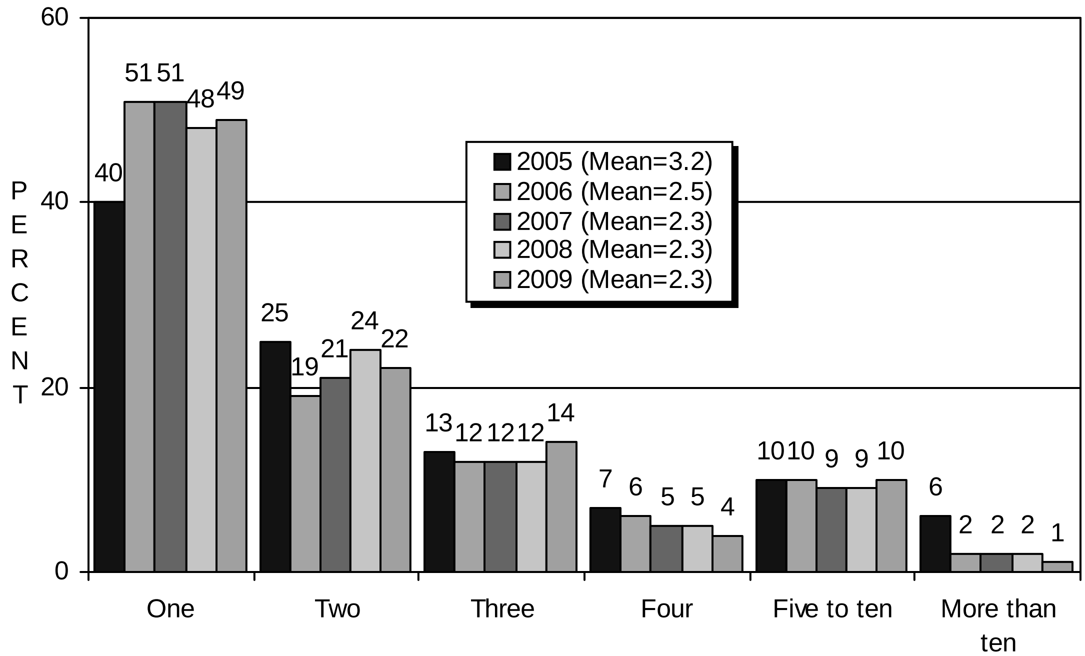
The average number of visits to Laughlin in the past five years *among all visitors* was 10.2 in this year's survey, down significantly from 11.5 in 2005 (Figure 2). The proportion of visitors saying they visited only once in the past five years stands at 19%, significantly higher than in 2005 and 2006 (15% each), 2007 (14%) and last year (12%).

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



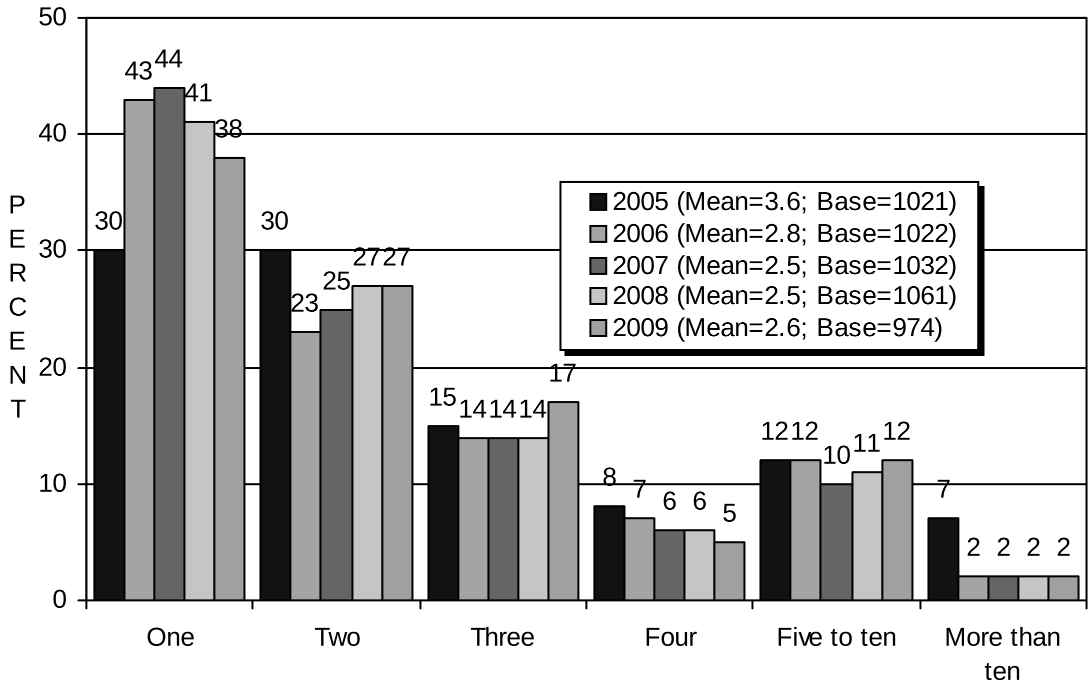
The average number of visits to Laughlin during the past five years *among repeat visitors* was 12.3, not significantly different from past years (Figure 3).

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



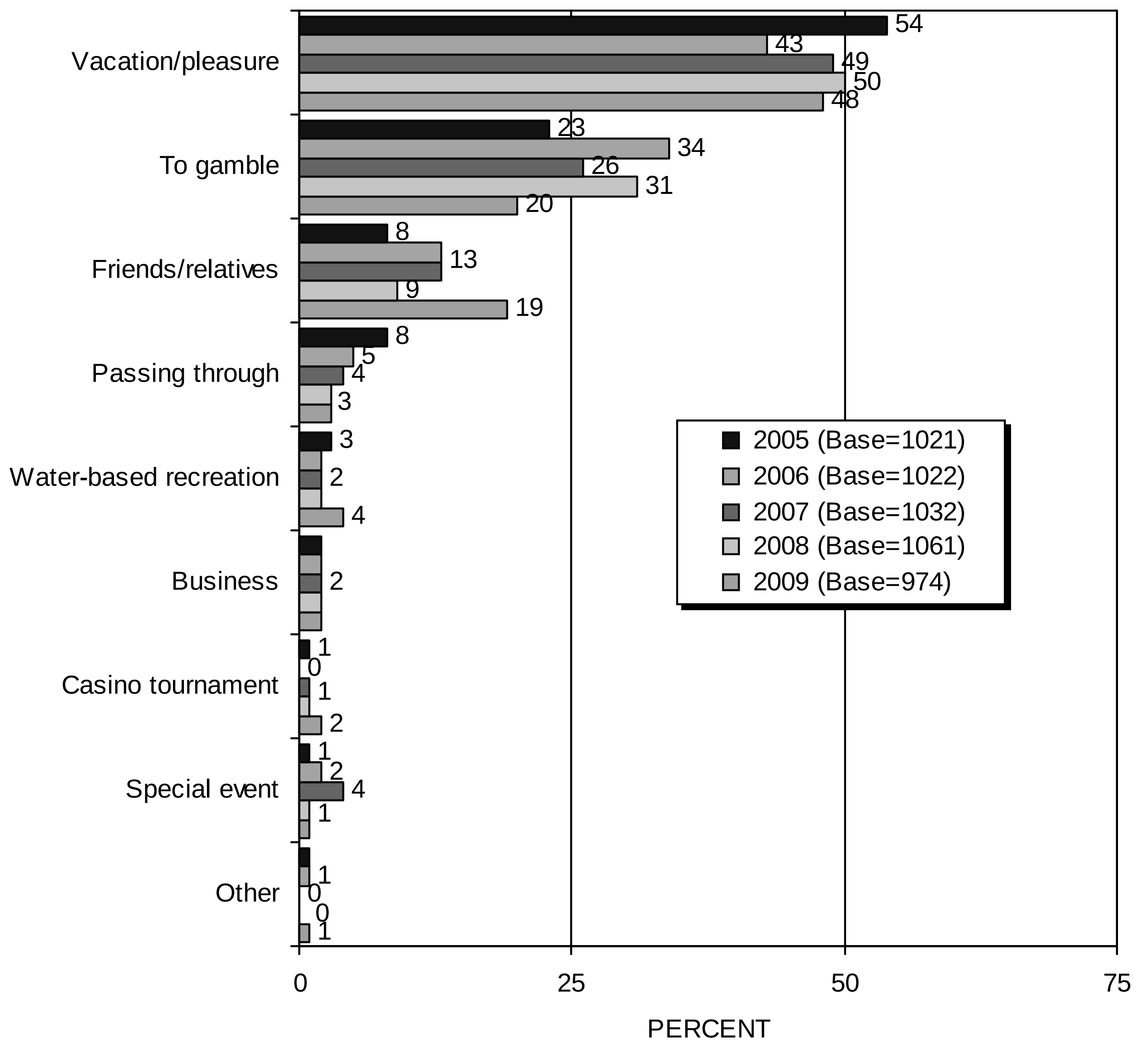
Among *all visitors*, the average number of visits in the past year was 2.3, down significantly from 3.2 in 2005 and 2.5 in 2006 (Figure 4). Forty-nine percent (49%) reported visiting Laughlin only once in the past year, up from 40% in 2005, while 22% reported visiting twice, down from 25% in 2005. Only 1% reported visiting Laughlin more than ten times in the past year, down from 6% in 2005.

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



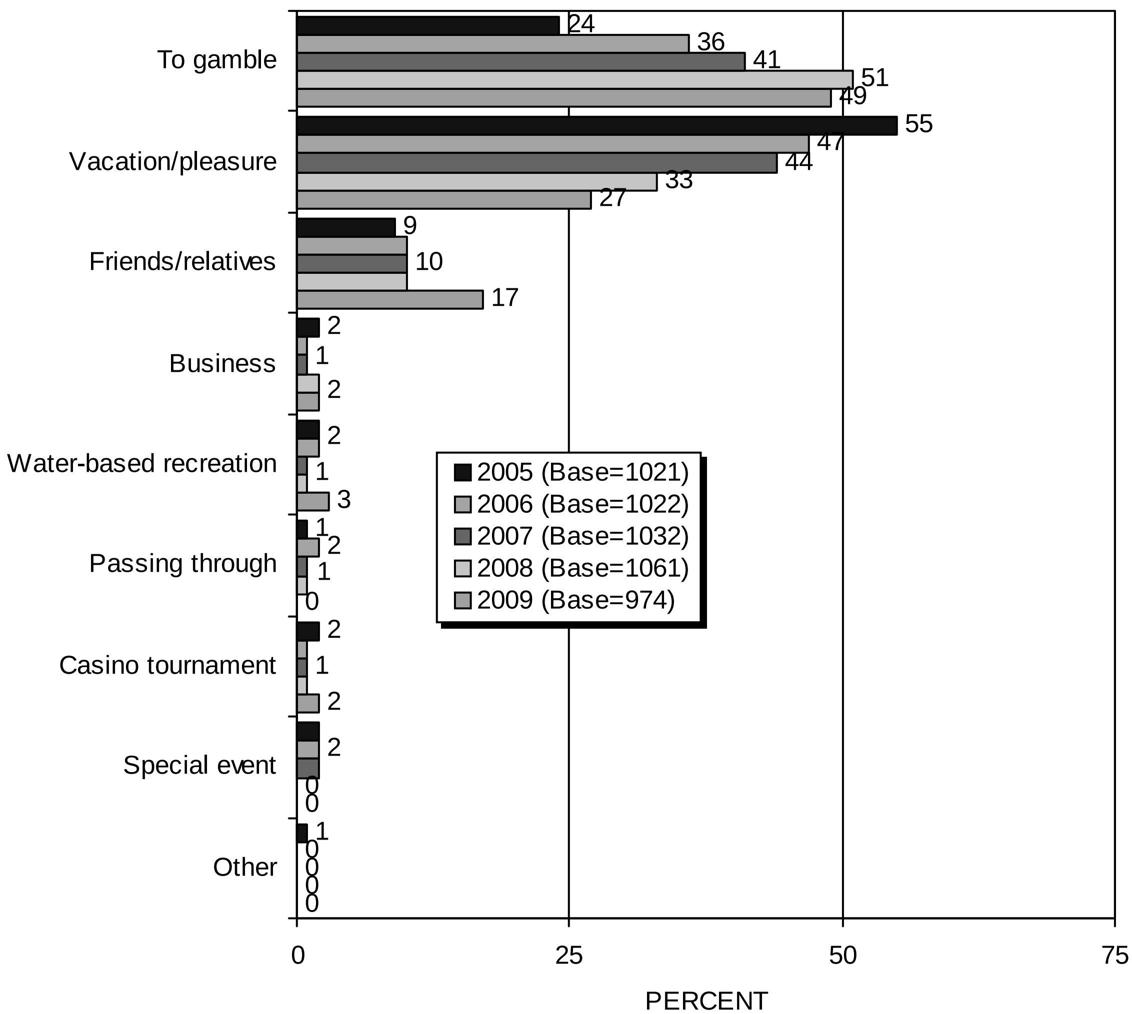
During the past year, repeat visitors averaged 2.6 trips to Laughlin, down significantly from 3.6 in 2005 (Figure 5). Among repeat visitors, 38% reported visiting just once in the past year, up from 30% in 2005 but down from 43% in 2006 and 44% in 2007. Twenty-seven percent (27%) reported visiting twice, up from 23% in 2006. Only 2% reported visiting ten or more times in the past year, down from 7% in 2005.

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



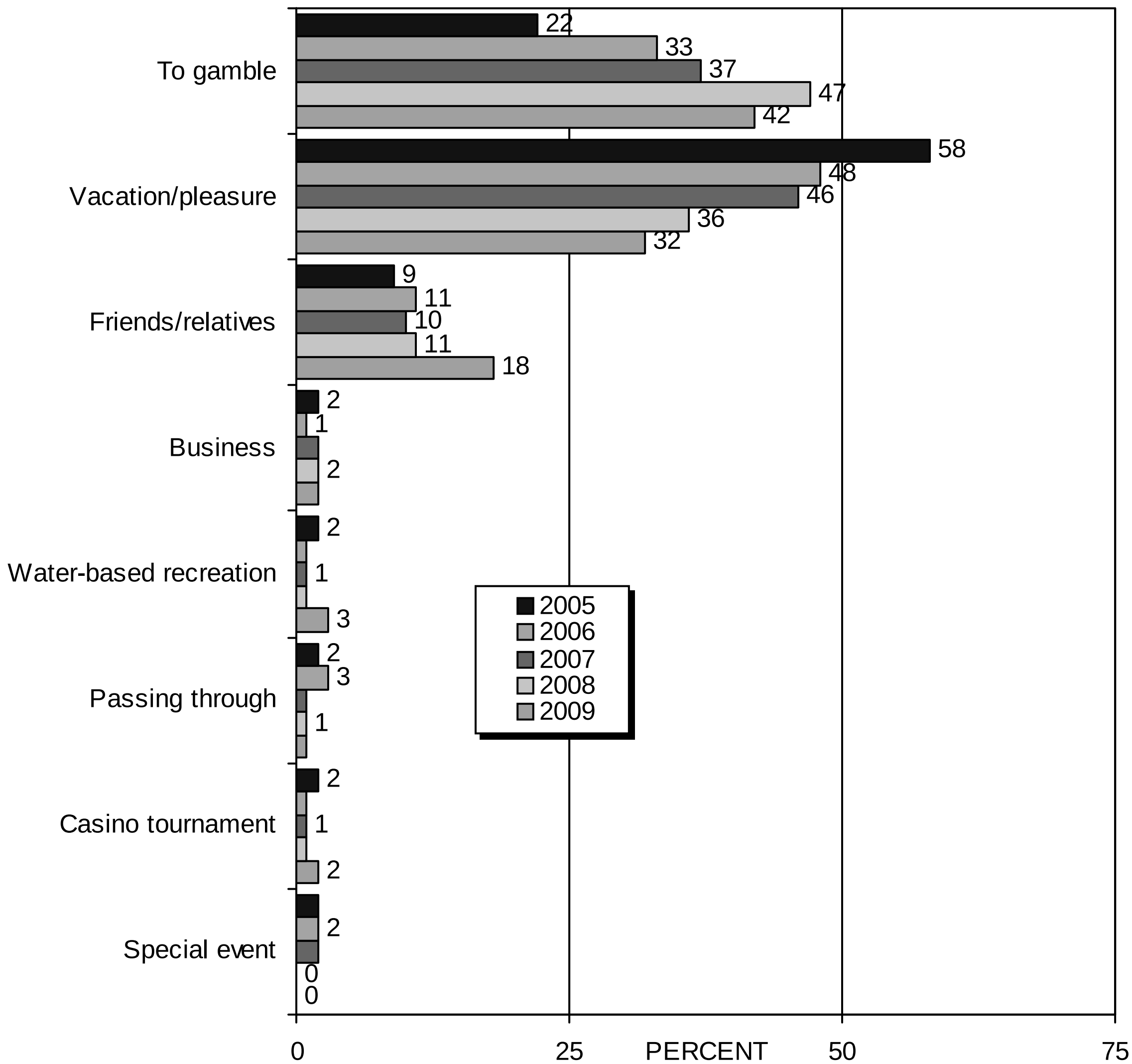
Almost one-half (48%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure, a significant increase from 43% in 2006, but a significant decrease from 54% in 2005 (Figure 6). Two in ten repeat visitors (20%) said they first came to Laughlin for gambling, down significantly from 34% in 2006, 26% in 2007, and 31% last year. One in five (19%) first came to Laughlin to visit family or friends, up significantly from past readings. Four percent (4%) said they first came to Laughlin for water-based recreation, up from 2% each from 2006 to 2008, while 2% came for a casino tournament, also up from past readings. Three percent (3%) said they were just passing through Laughlin, down from 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 (27%) was down significantly from all prior years (Figure 7). The proportion who said they came to gamble was 49%, similar to last year, but up significantly from 24% in 2005, 36% in 2006, and 41% in 2007. Seventeen percent (17%) said they came to visit friends or family, up significantly from 9% in 2005, and 10% each from 2006 to 2008. Three percent (3%) said they came for water-based recreation, up from 2% in 2006 and 1% each in 2007 and 2008.

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



The proportion of *all visitors* in 2009 who reported that the primary purpose for their current visit to Laughlin was vacation or pleasure (32%) 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 (42%) was down significantly from last year (47%), but still up significantly from 2005 to 2007 readings. Eighteen percent (18%) said they came to visit friends or relatives, up significantly from prior years. Three percent (3%) said they came to Laughlin for water-based recreation, up from 1% each from 2006 to 2008.

FIGURE 9
Primary Purpose Of First Visit Vs. Current Visit — 2009
(Among Repeat Visitors)

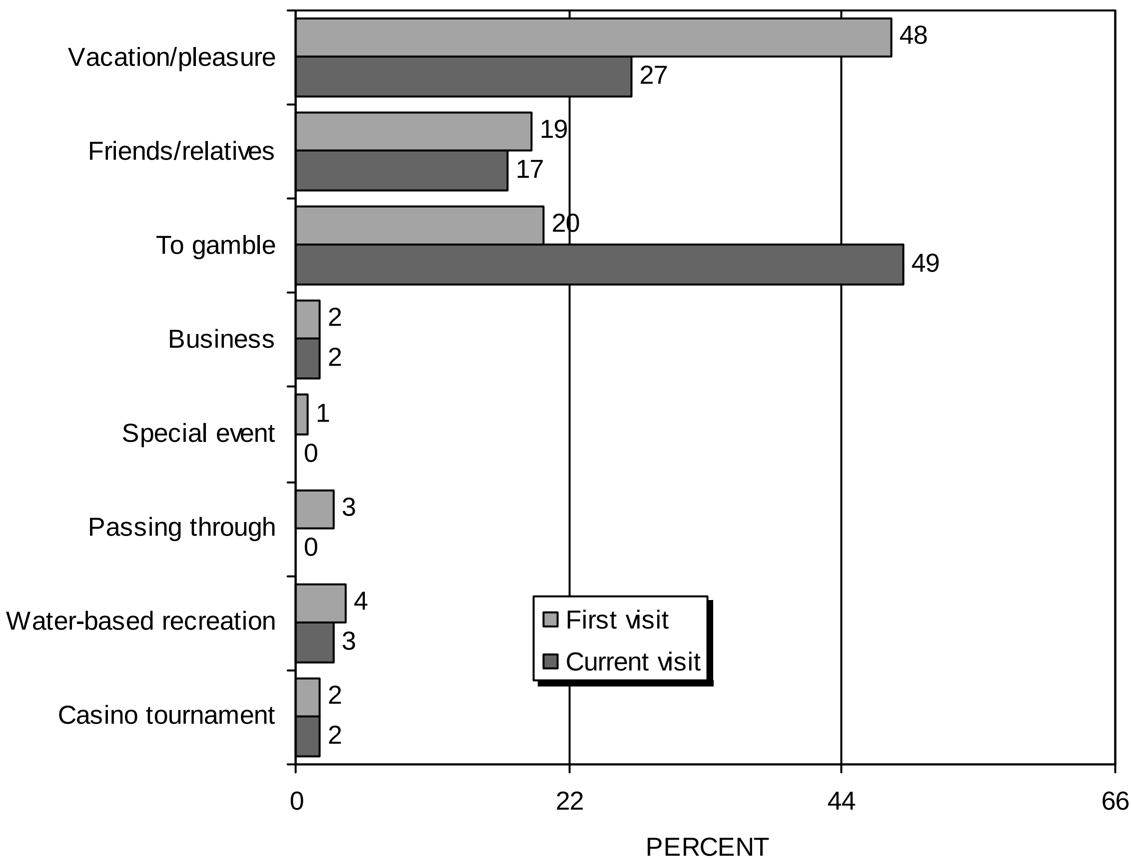


Figure 9 compares the reasons given by *repeat visitors* for their first Laughlin visit versus their current visit in 2009. Nearly one-half (48%) of repeat visitors said the primary purpose of their first trip to Laughlin was for vacation or a pleasure trip, while about one-quarter (27%) said vacation/pleasure was the main reason for their current visit. By contrast, 20% of repeat visitors said they first visited Laughlin primarily to gamble but nearly one-half (49%) said gambling was the primary purpose of their current visit.

FIGURE 10
Primary Purpose Of Current Visit — 2009
(First-Time Vs. Repeat Visitors)

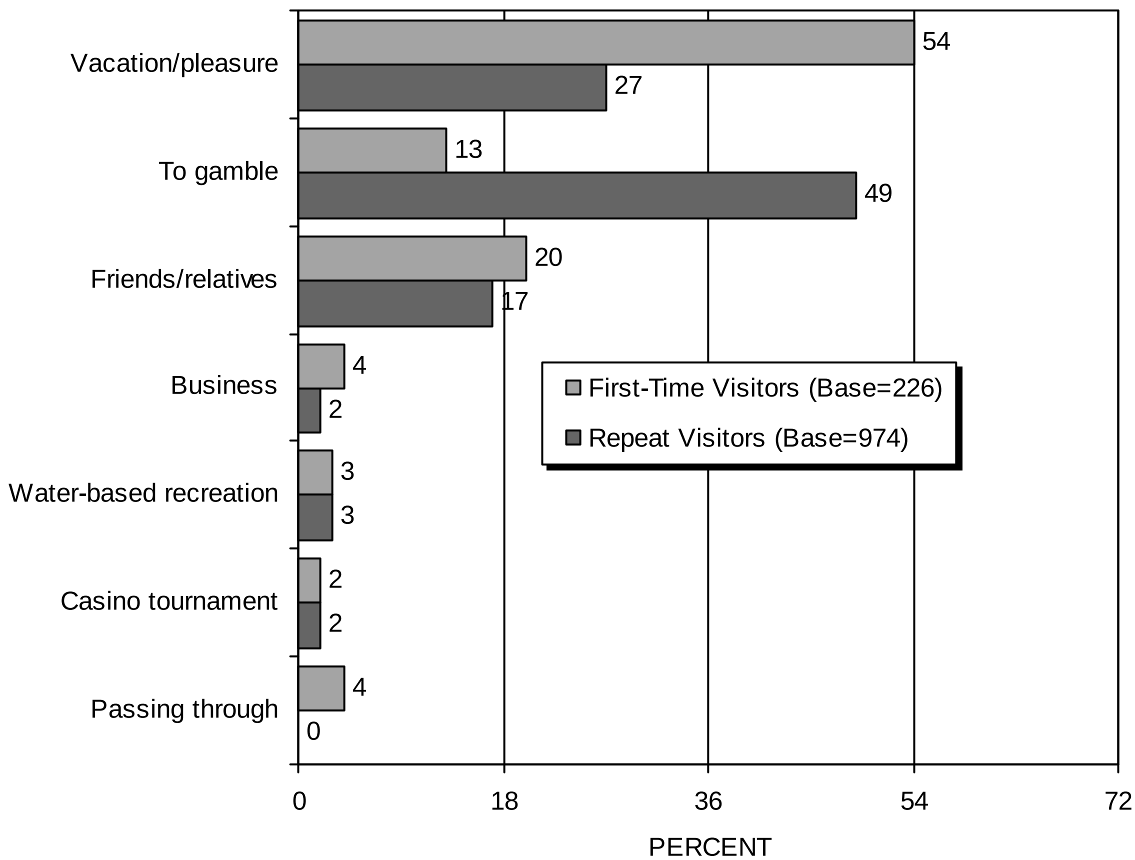
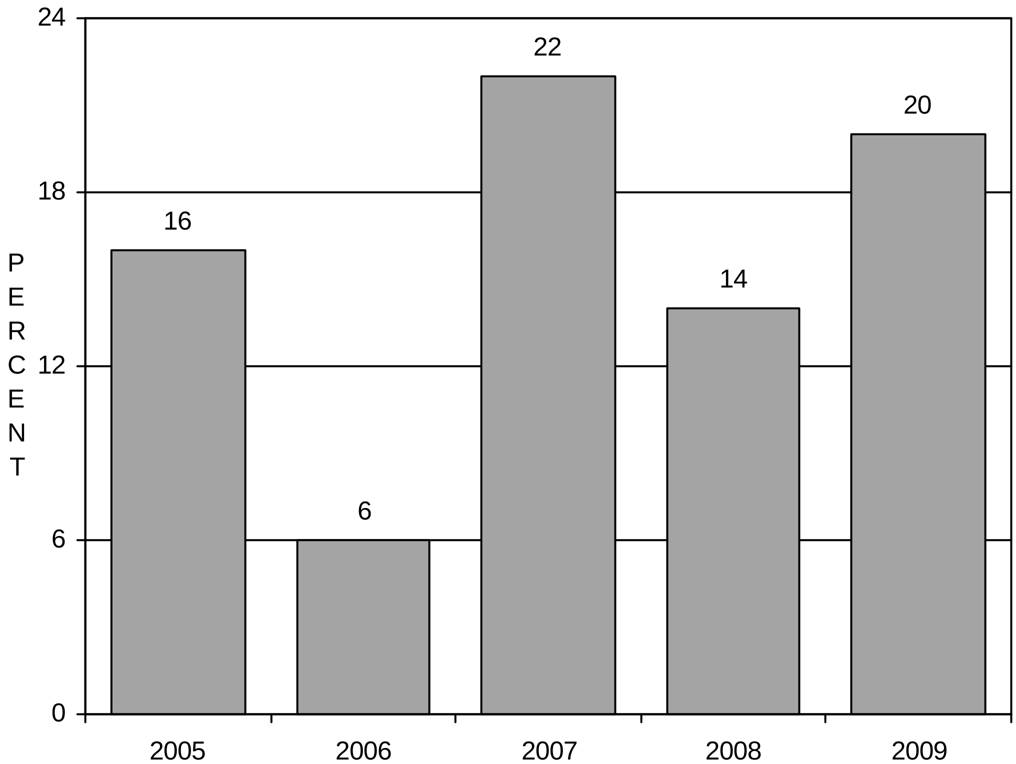


Figure 10 compares *first-time visitors* with *repeat visitors* in terms of purpose of their *current* visit to Laughlin in 2009. First-time visitors (54%) were significantly more likely than repeat visitors (27%) to say their current visit to Laughlin was for vacation or pleasure. Repeat visitors (49%) were significantly more likely than first-time visitors (13%) to say they were visiting Laughlin primarily to gamble.

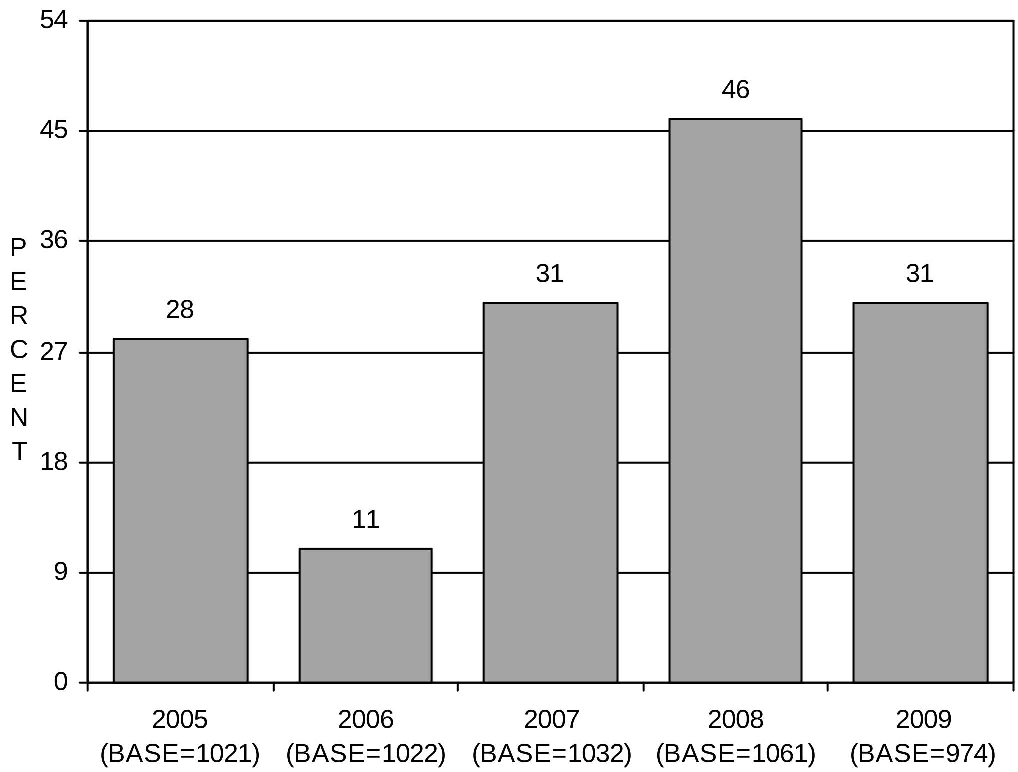
FIGURE 11
Gaming Tournaments*



We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). One in five visitors (20%) said they planned to participate in a gaming tournament, similar to 2007, but up significantly from 2005 (16%), 2006 (6%), and last year (14%).

* 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). Three in ten (31%) said they had, up from 11% in 2006, but down from 46% last year.

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* 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 (59%) was similar to 2007 (61%) and 2008 (61%), but up significantly from 2005 (49%), and 2006 (51%). The percentage of visitors planning more than 30 days in advance stands at 28%, about the same as 2006 to 2008, but down significantly from 2005 (39%). Five percent (5%) said they planned their trip to Laughlin on the same day they arrived, up from all prior readings.

FIGURE 13
Advance Travel Planning

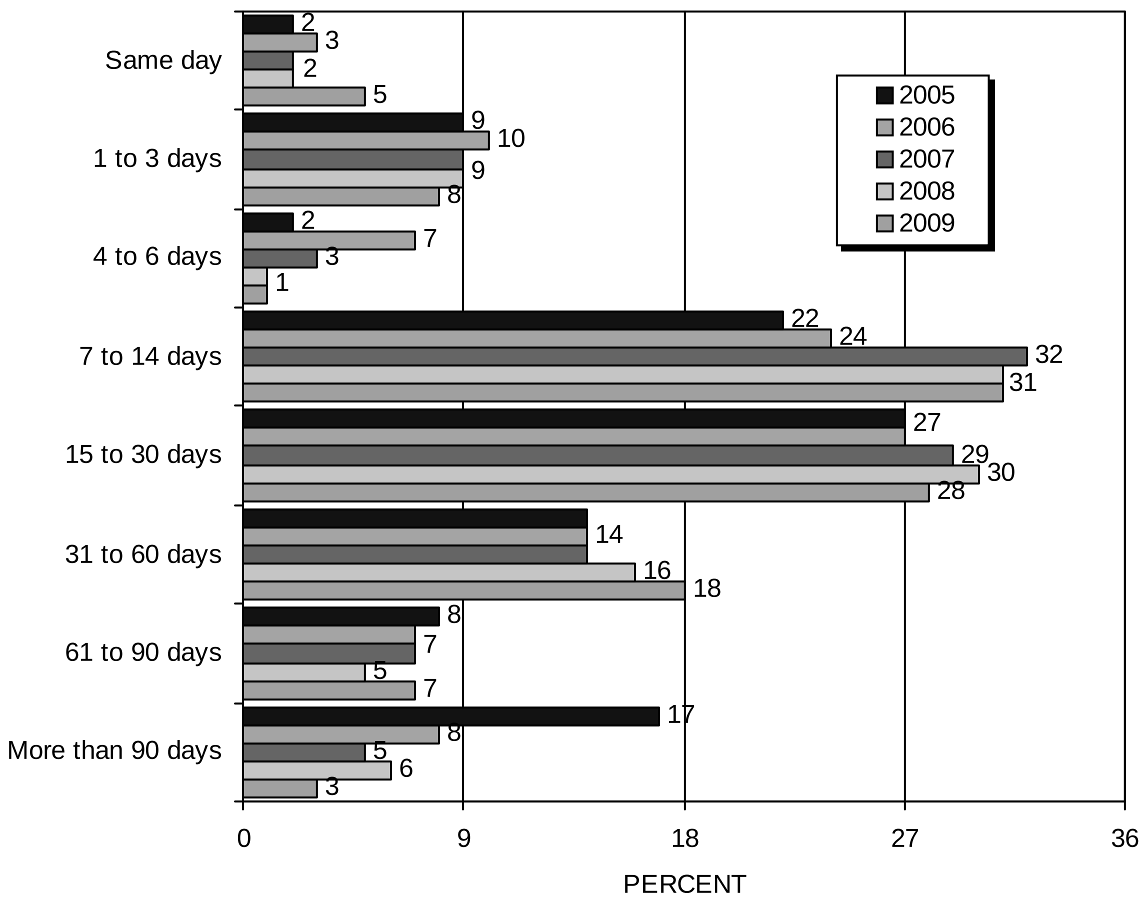
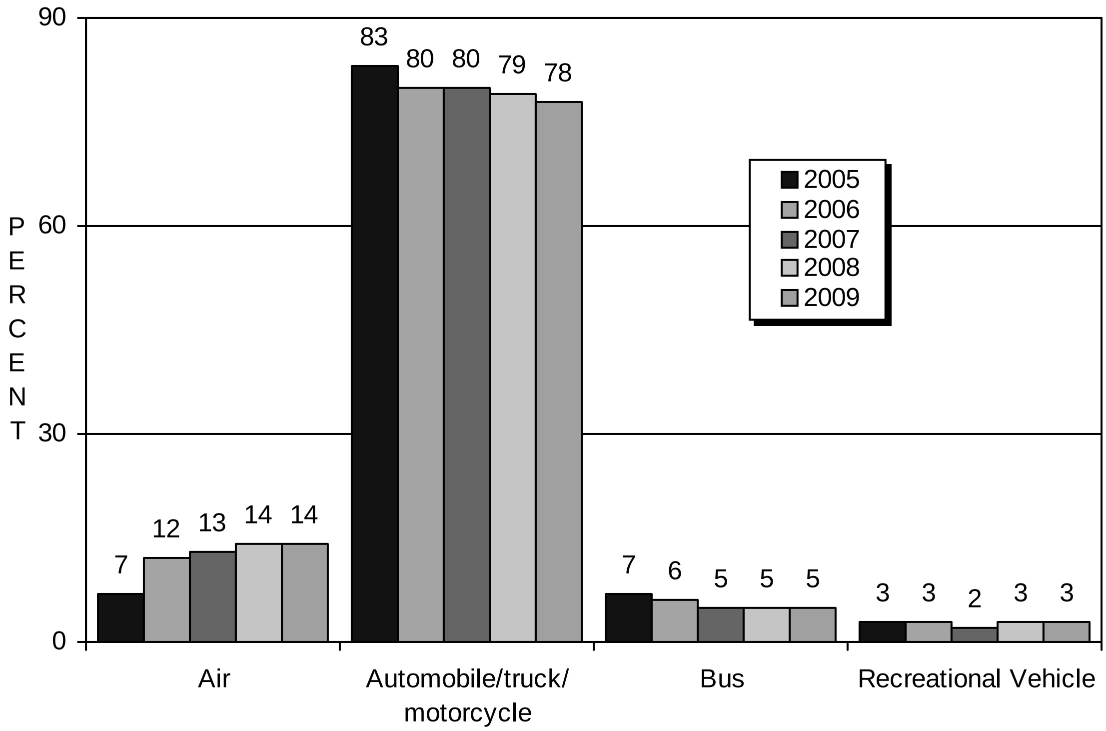
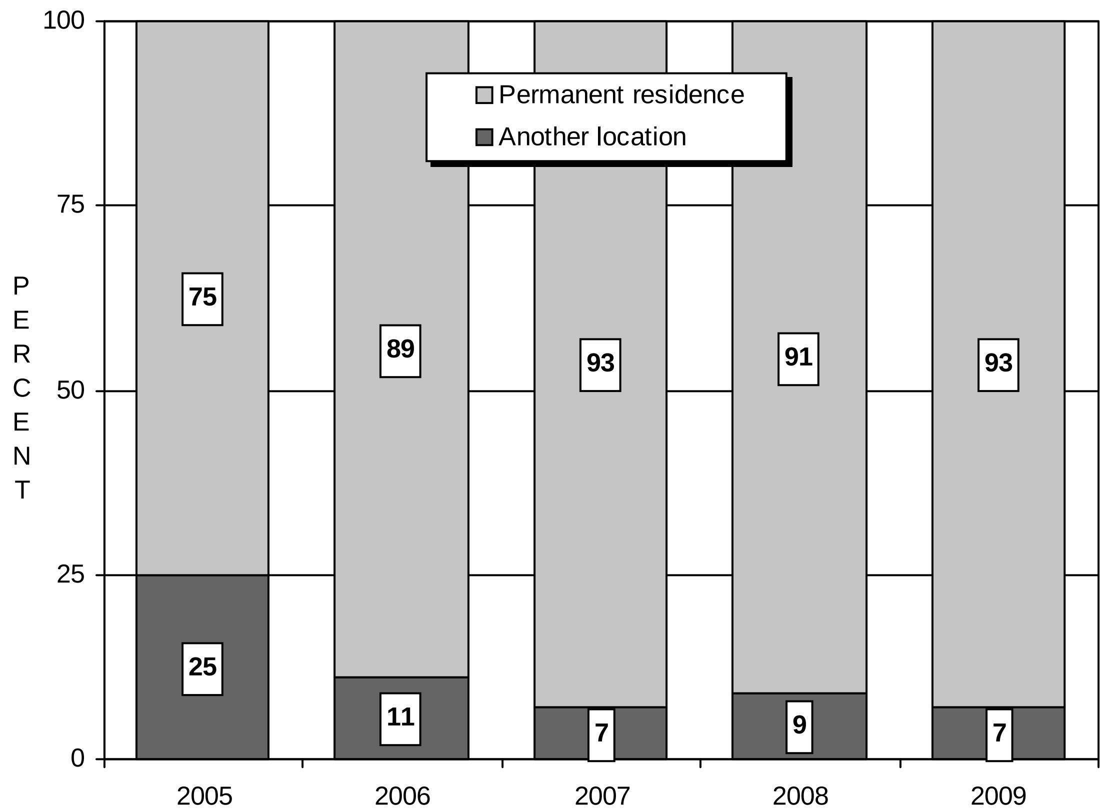


FIGURE 14
Transportation To Laughlin



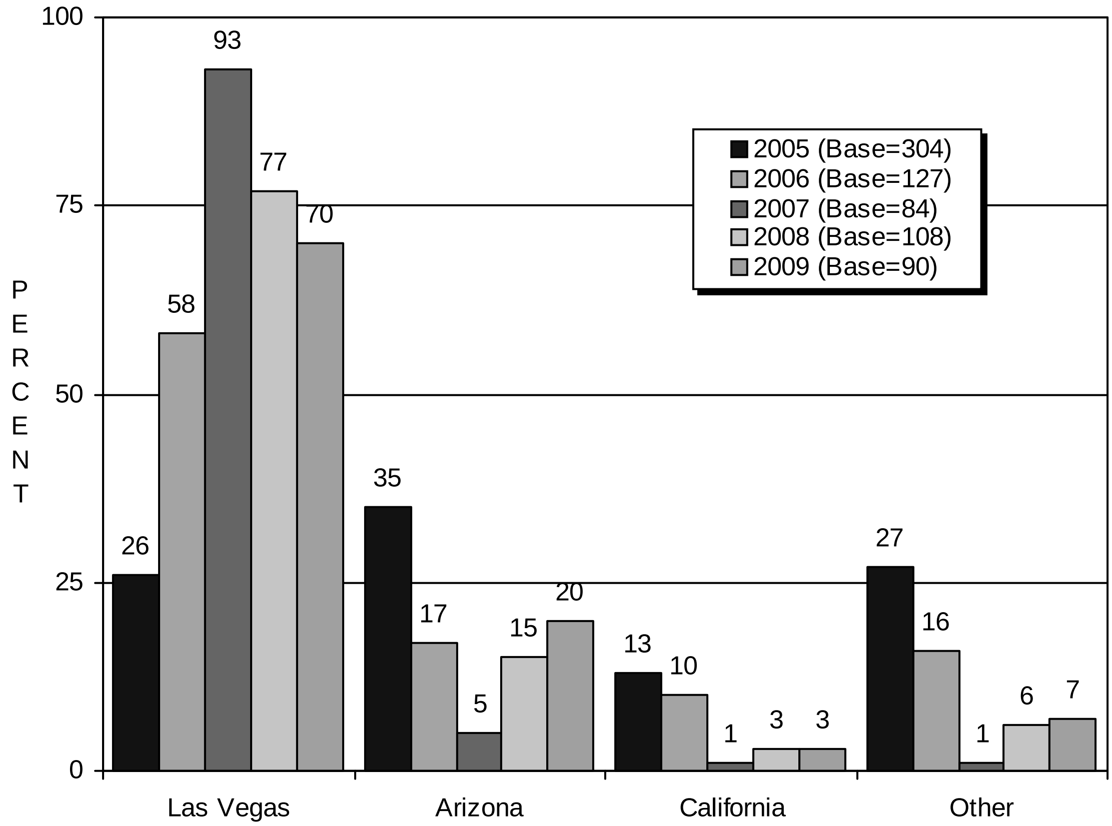
As in past years, most visitors traveled to Laughlin by automobile, truck, or motorcycle (78%, down from 83% in 2005) (Figure 14). Five percent (5%) traveled by bus, 14% said they came by air (up from 7% in 2005), and 3% came in an RV.

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



In 2009, more than nine in ten visitors (93%) arrived in Laughlin directly from their permanent residences, up significantly from 2005 (75%) and 2006 (89%) (Figure 15).

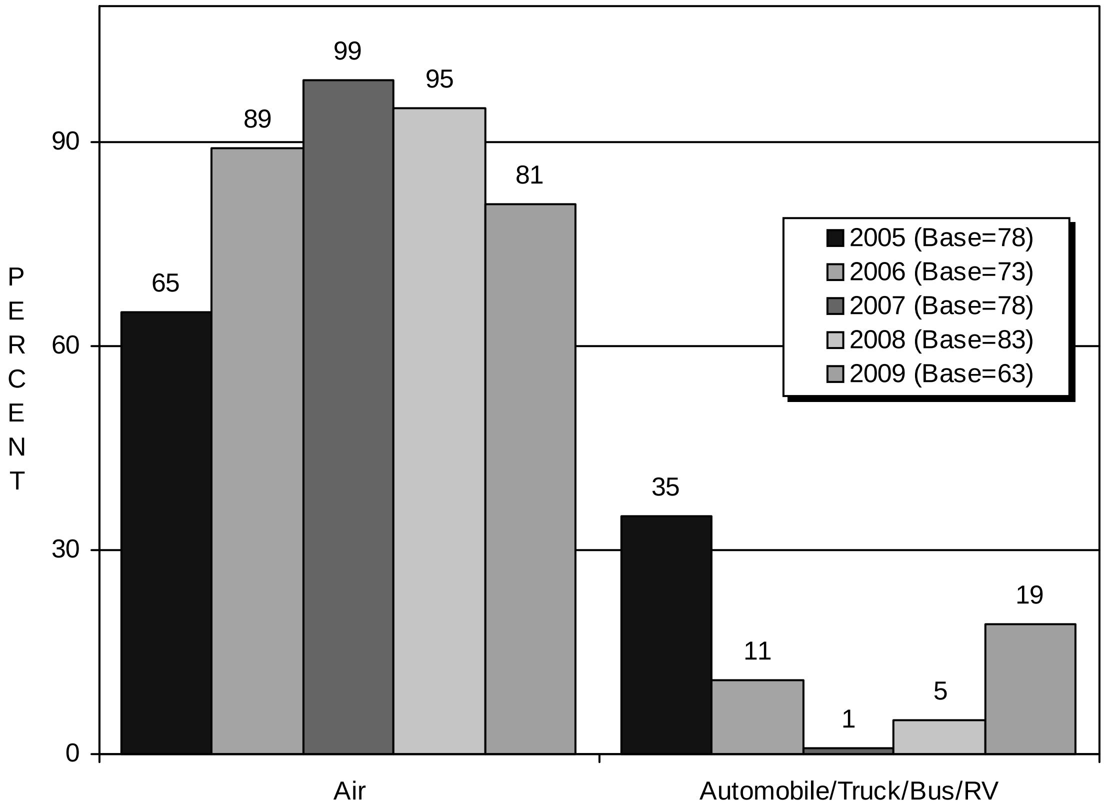
FIGURE 16
Where Visitors Came From
(Among Those Who Did Not Come To Laughlin
Directly From Their Permanent Residence)



Among those who came to Laughlin after visiting another location (Figure 16), 70% came from Las Vegas, a significant increase from 2005 (26%), but a significant decrease from 2007 (93%).

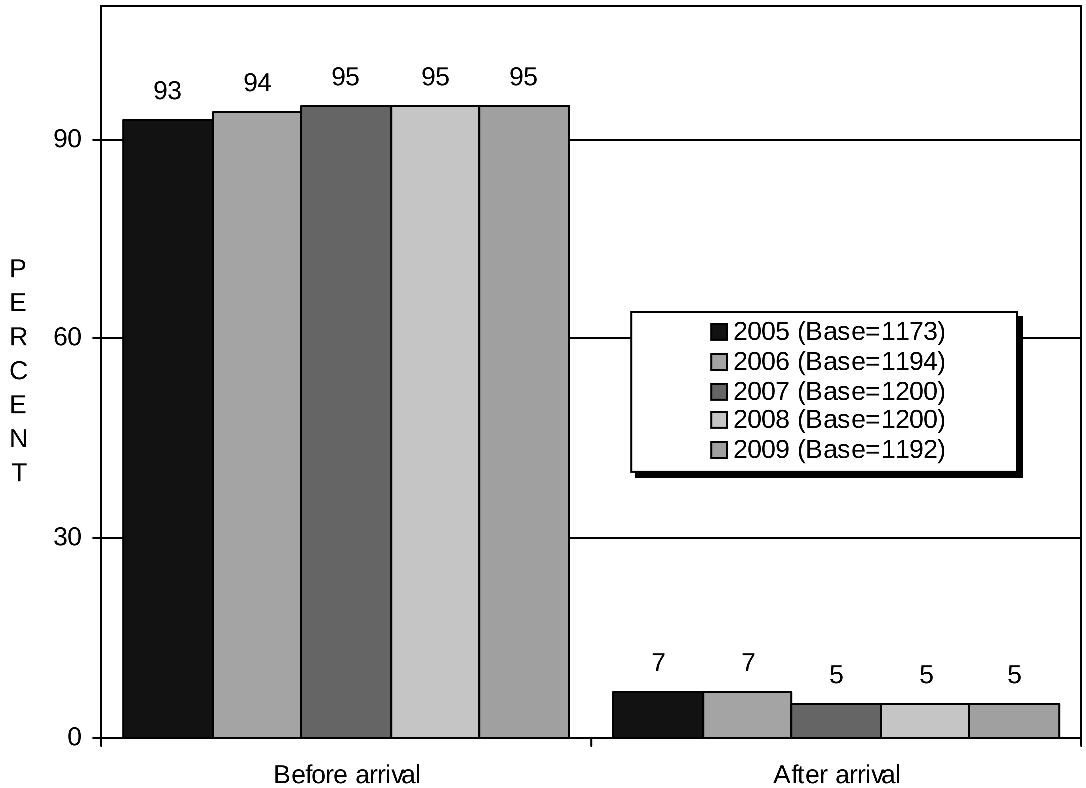
One in five (20%) came from Arizona, down from 35% in 2005, but up from 5% in 2007. Three percent (3%) came from California, down from 13% in 2005, and 10% in 2006. Seven percent (7%) came from some other location, down from 27% in 2005, and 16% in 2006.

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



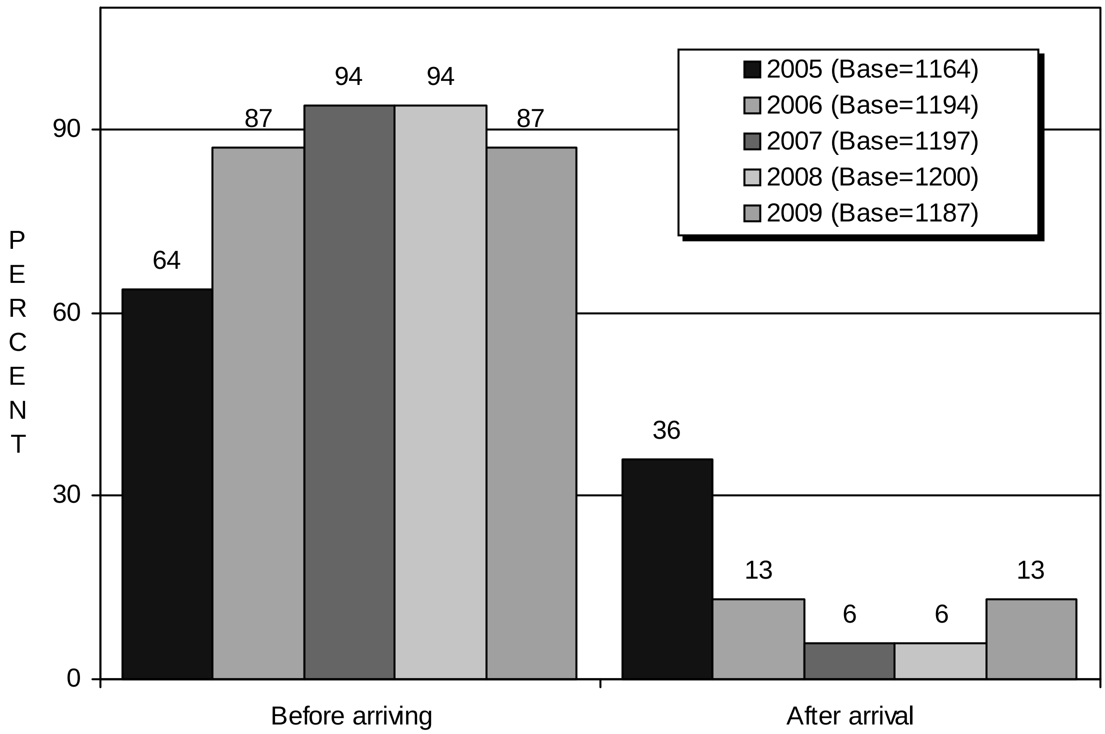
We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Four out of five (81%) arrived by air, a significant increase from 2005 (65%), but a significant decrease from 2007 (99%) and last year (95%). Nineteen percent (19%) arrived by ground transportation, up from 1% in 2007, and 5% last year.

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



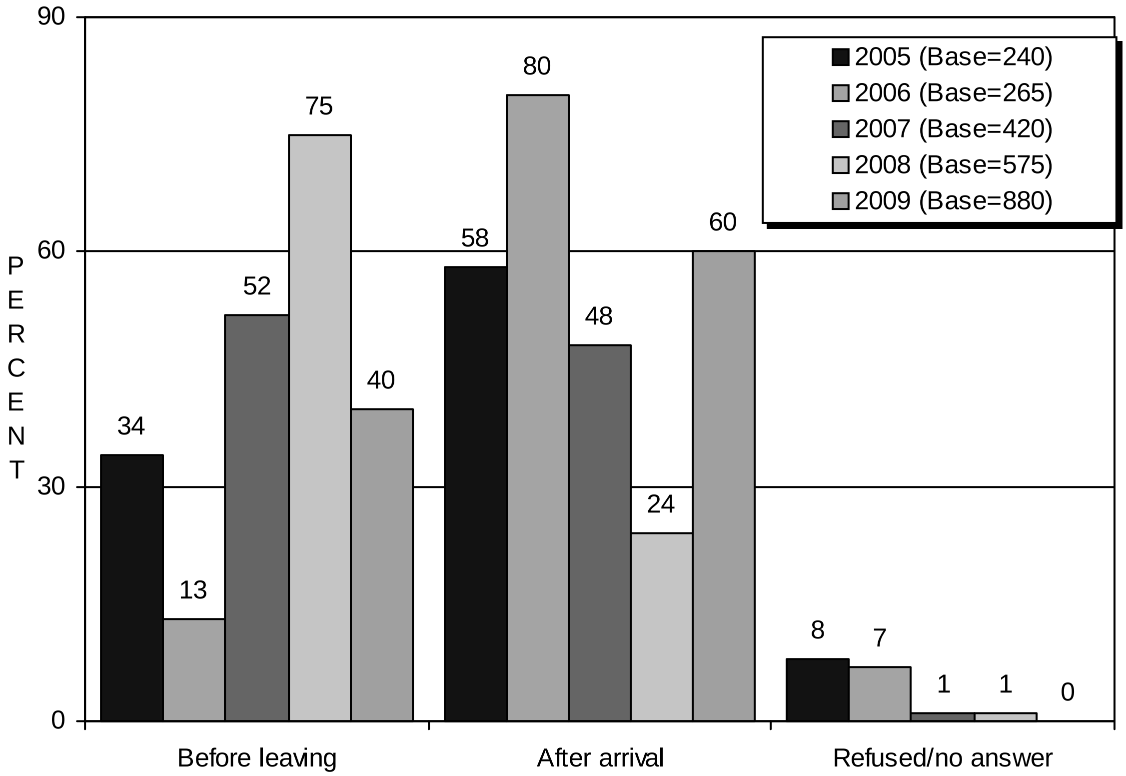
In 2009, most visitors decided where to stay in Laughlin prior to their visits (95%, up from 93% in 2005), while 5% decided after arrival (Figure 18).

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



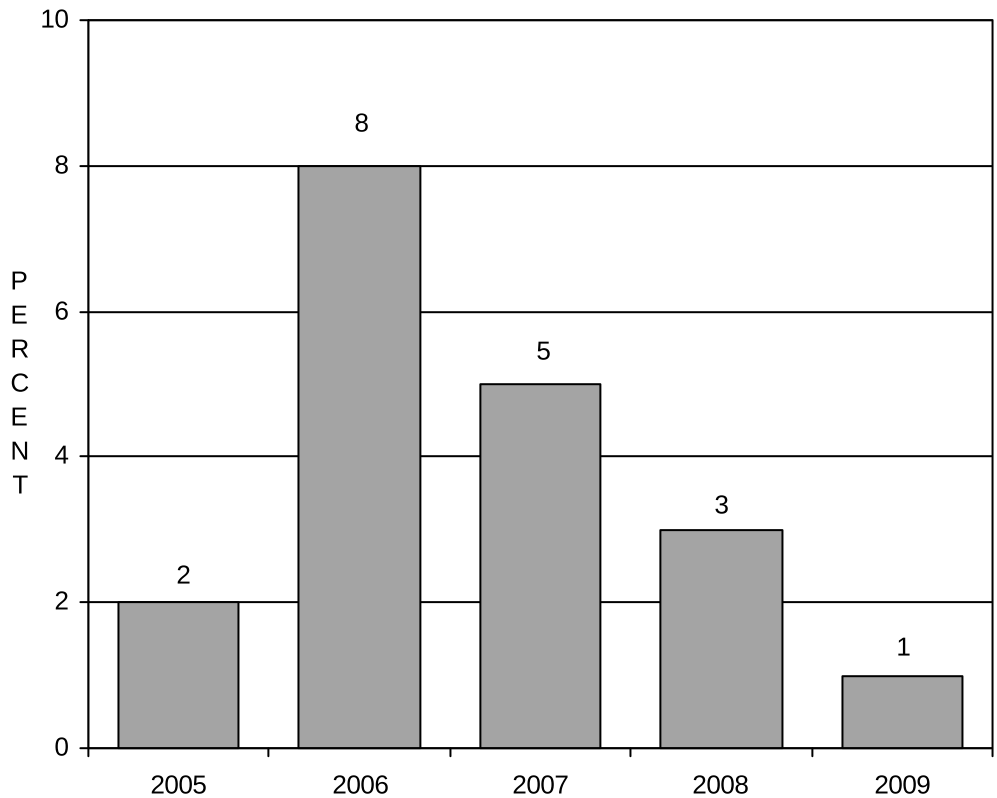
Eighty-seven percent (87%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (Figure 19), up significantly from 2005 (64%), but down from 2007 and last year (94% each). One in eight (13%) reported making their decision about where to gamble after they arrived in Laughlin, up from 6% each in 2007 and 2008, but down from 36% in 2005.

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



Among visitors who reported going to see a show, 60% decided what shows to see after arriving in Laughlin, down significantly from 80% in 2006, but up from 48% in 2007 and 24% last year (Figure 20).

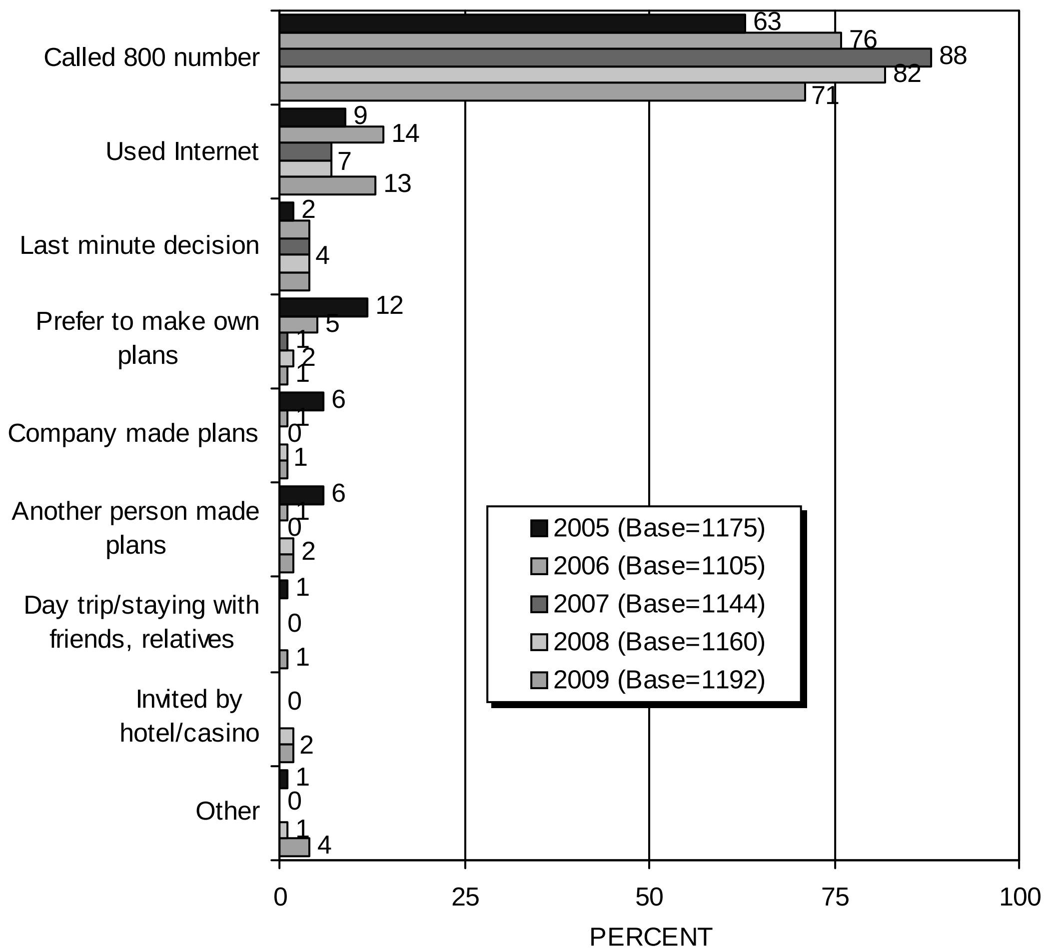
FIGURE 21
Travel Agent Assistance*
(Among All Visitors)



One percent (1%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2009, a significant decrease from prior years (Figure 21).

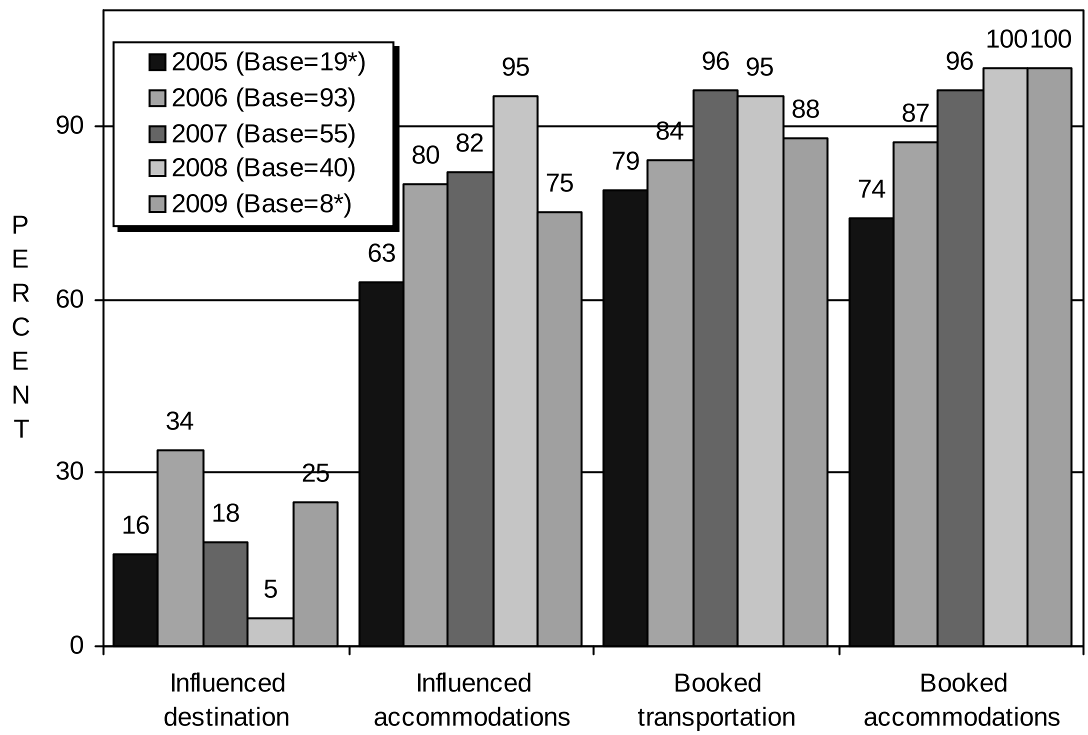
* Only “yes” responses are reported in this chart.

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). Seven in ten (71%) said it was because they used an 800 number, up from 63% in 2005, but down from 76% in 2006, 88% in 2007, and 82% last year. Thirteen percent (13%) said they used the Internet to make their travel arrangements, up significantly from 9% in 2005 and 7% each in 2007 and last year. Four percent (4%) said it was a last minute decision and there was no time to call a travel agent, the same as the last three years, but up from 2% in 2005. Only 1% said they preferred to make their own plans, down from 12% in 2005 and 5% in 2006.

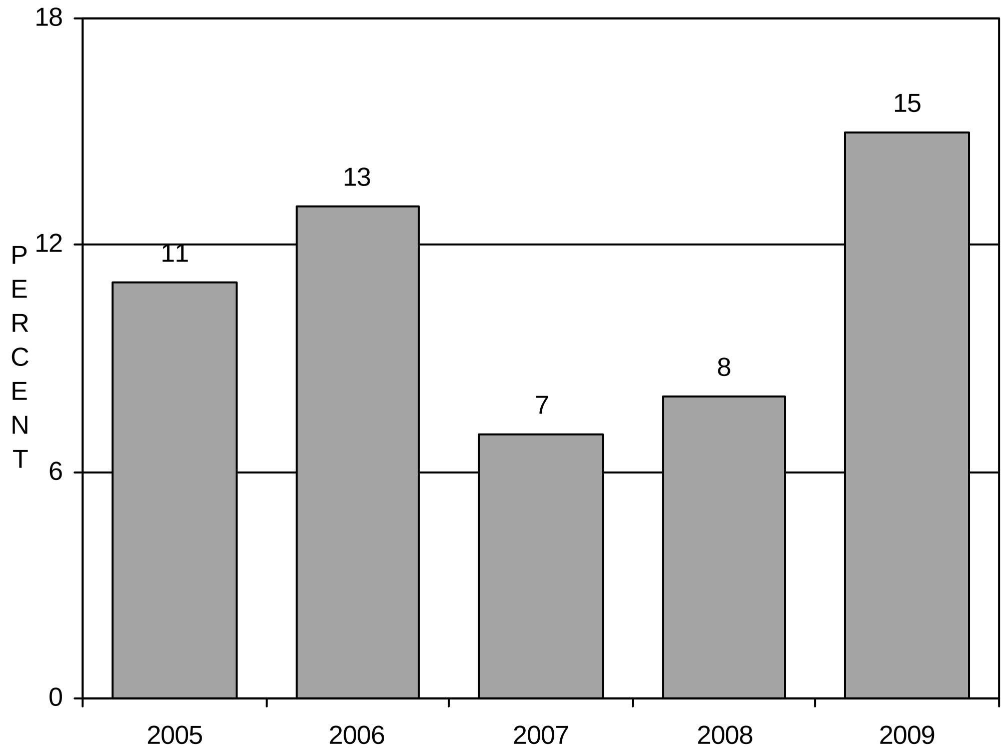
FIGURE 23
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)



Among the eight (8) visitors who reported using a travel agent in 2009 (Figure 23), all of them (100%) had travel agents help them book their accommodations, and seven (88%) had a travel agent help with booking their transportation. Six (75%) said a travel agent influenced their choice of accommodations, while two (25%) said the travel agent influenced their decision to visit Laughlin.

* Base sizes in 2005 and 2009 are too small to allow reliable statistical comparisons with other years.

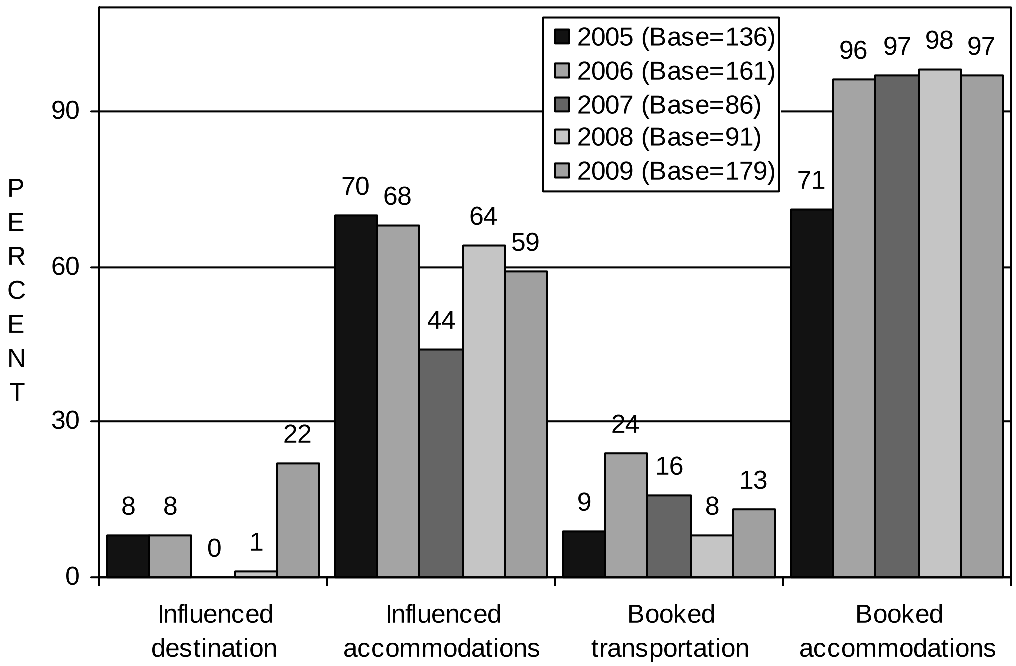
FIGURE 24
Whether Used Internet To Plan Trip*



Fifteen percent (15%) of visitors said they used the Internet to plan their trip to Laughlin in 2009, up significantly from 11% in 2005, 7% in 2007, and 8% last year (Figure 24).

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

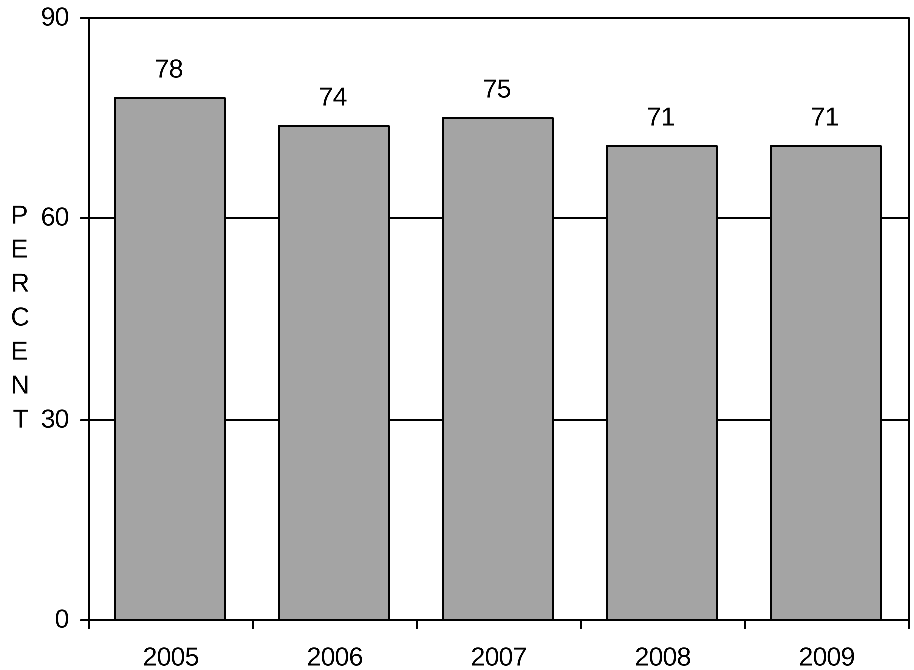
FIGURE 25
Internet Influence And Use*
(Among Those Who Used Internet To Plan Trip)



Among visitors who used the Internet to plan their trip, almost all of them (97%) booked their accommodations online, similar to the last three years, but a significant increase from 71% in 2005 (Figure 25). Fifty-nine percent (59%) said the Internet influenced their choice of accommodations, up from 44% in 2007, but down significantly from 70% in 2005. Thirteen percent (13%) said they booked transportation to Laughlin through the Internet, a decrease from 24% in 2006. Twenty-two percent (22%) said the Internet influenced their decision to visit Laughlin, up from all prior years.

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

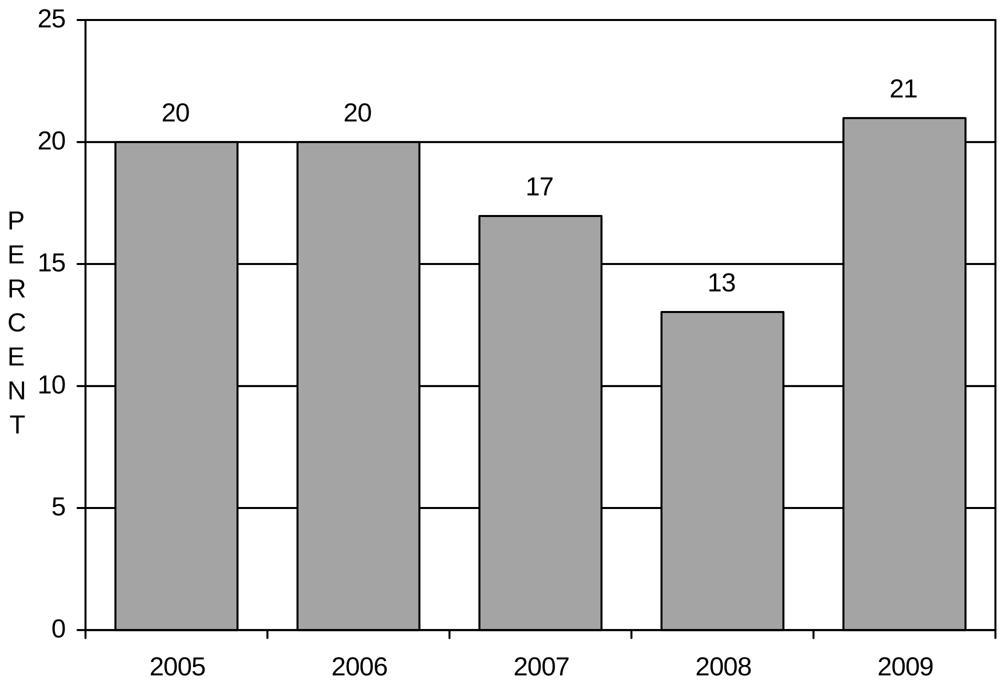
FIGURE 26
Whether Visited Las Vegas During Past Five Years*



Seven in ten Laughlin visitors (71%) said they have visited Las Vegas in the past five years, the same as last year, but down from 78% in 2005 and 75% in 2007 (Figure 26).

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

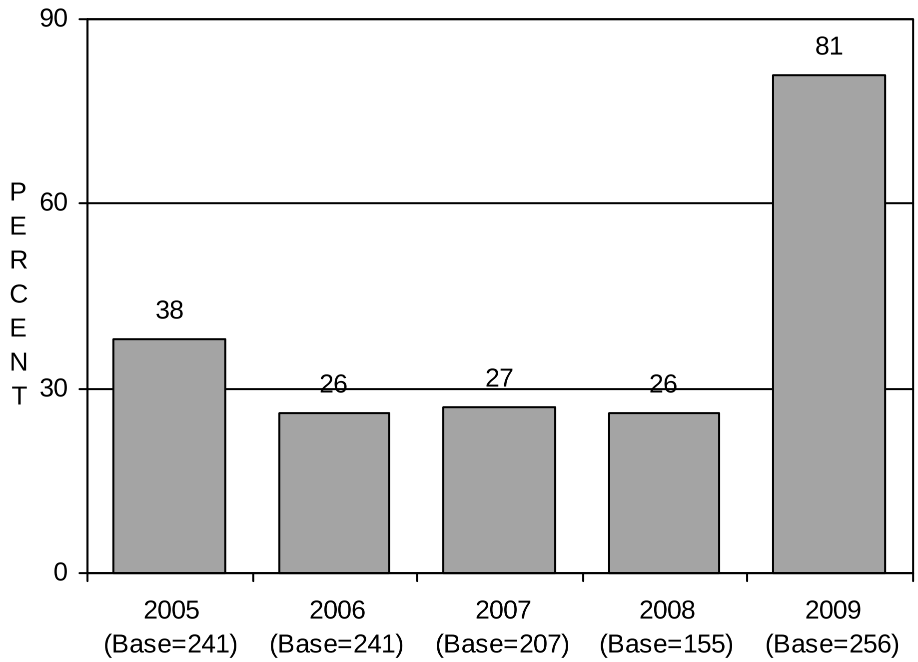
FIGURE 27
Visiting Las Vegas
On This Trip To Laughlin*



One in five Laughlin visitors (21%) said they had visited or were planning to visit Las Vegas on this trip, up from 17% in 2007 and 13% last year (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)

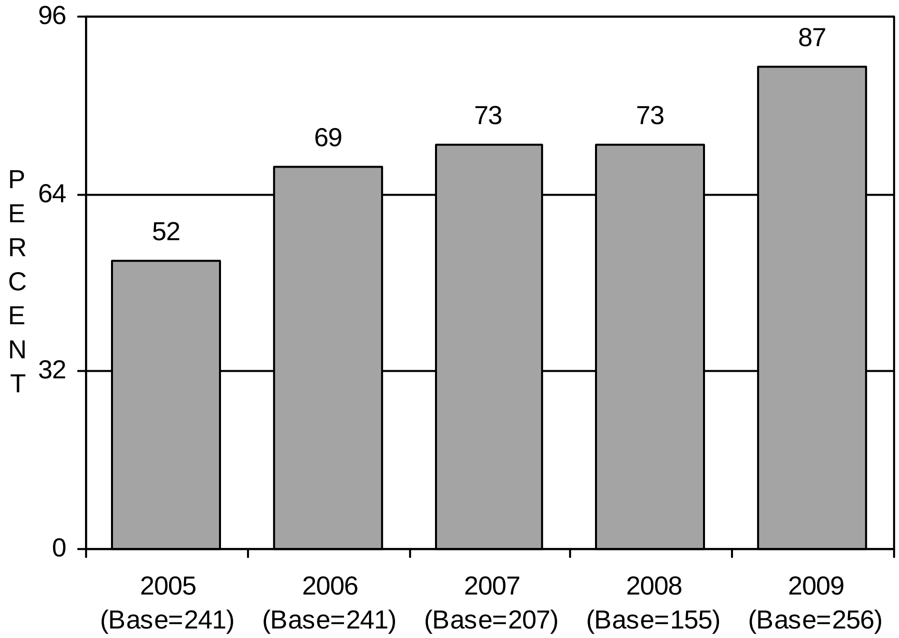


Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, four out of five (81%) said they had visited or intended to visit Downtown, up significantly from all prior years (Figure 28).

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

† Beginning in 2009, this question was refined to address inconsistencies in interpreting and reporting of survey responses. GLS Research believes that the 2009 results most accurately reflect the Laughlin visitor.

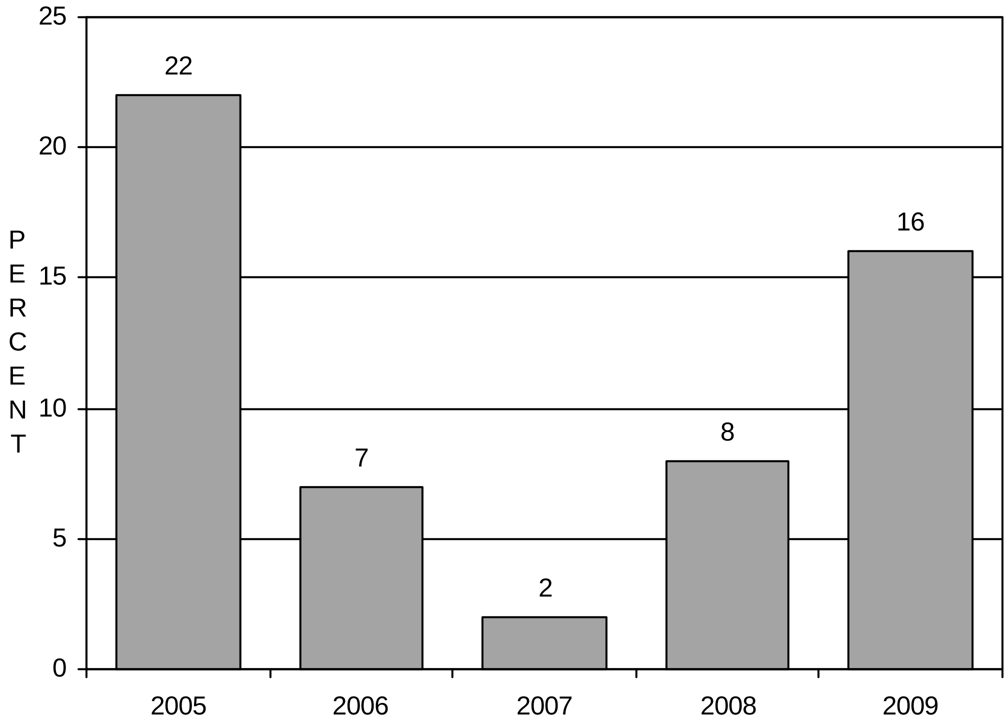
FIGURE 29
Visiting The Las Vegas Strip*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among those who visited or planned to visit Las Vegas on this trip to Laughlin, 87% said they intended to visit the Strip, up significantly from 52% in 2005, 69% in 2006, and 73% each in 2007 and last year (Figure 29).

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

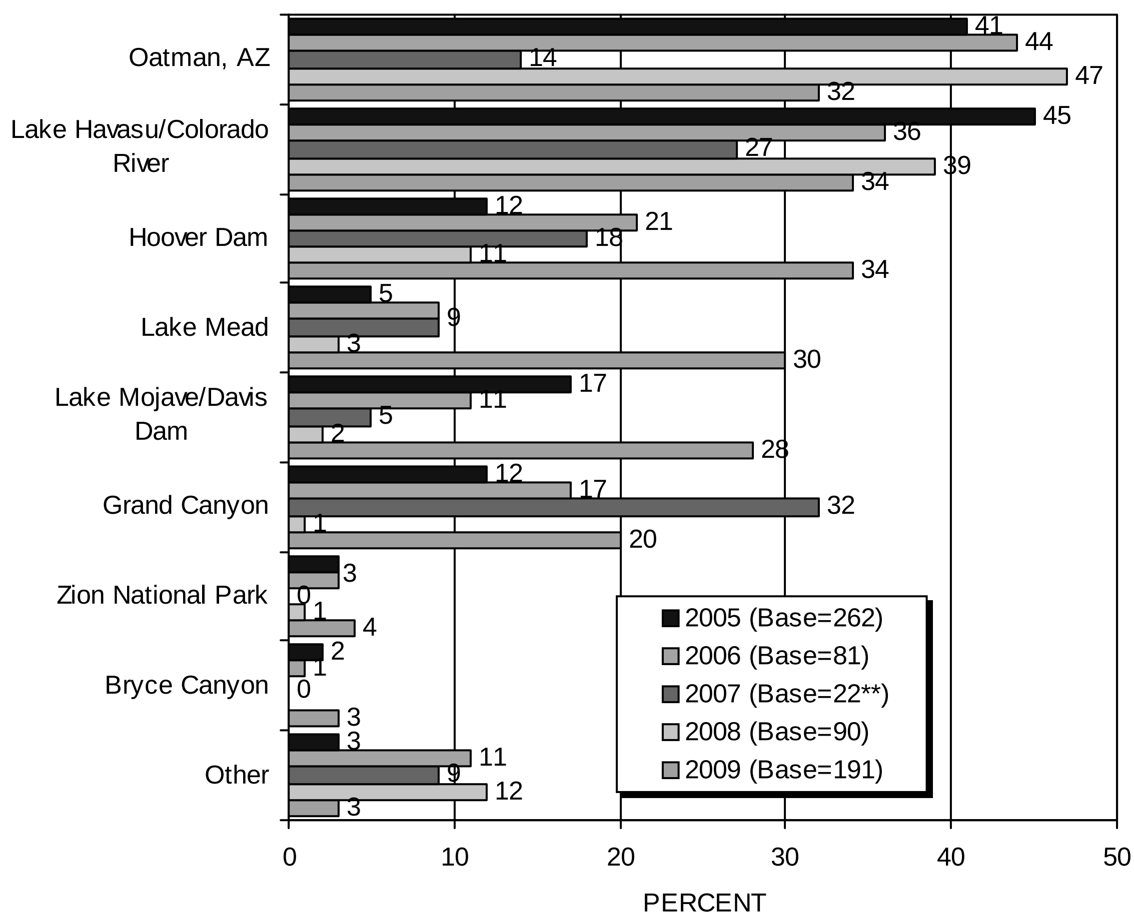
FIGURE 30
Touring Other Nearby Places*
(Among All Visitors)



We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 30), and one in six (16%) said yes, up significantly from 2006 to 2008 readings, but down from 22% in 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 Hoover Dam (34%, up significantly from 2005, 2006 and 2008) and the Lake Havasu/Colorado River area (34%, down from 45% in 2005), followed by Oatman (32%, down from 47% last year), Lake Mead (30%, up from prior years), and the Lake Mojave/Davis Dam area (28%, also up from prior years). One in five (20%) of those who visited other places went to the Grand Canyon, up from 12% in 2005 and 1% last year.

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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). Two-thirds (68%) reported two adults in their party, down from 73% in 2005, 81% in 2006, 84% in 2007, and 78% last year. Seven percent (7%) said they were traveling alone, a decrease from 11% in 2006. Seventeen percent (17%) said they were traveling in a party of four or more people (up significantly from 3% in 2006, 4% in 2007, and 10% last year). The average party size in 2009 was 2.5 persons, up significantly from prior readings.

FIGURE 32
Adults In Immediate Party

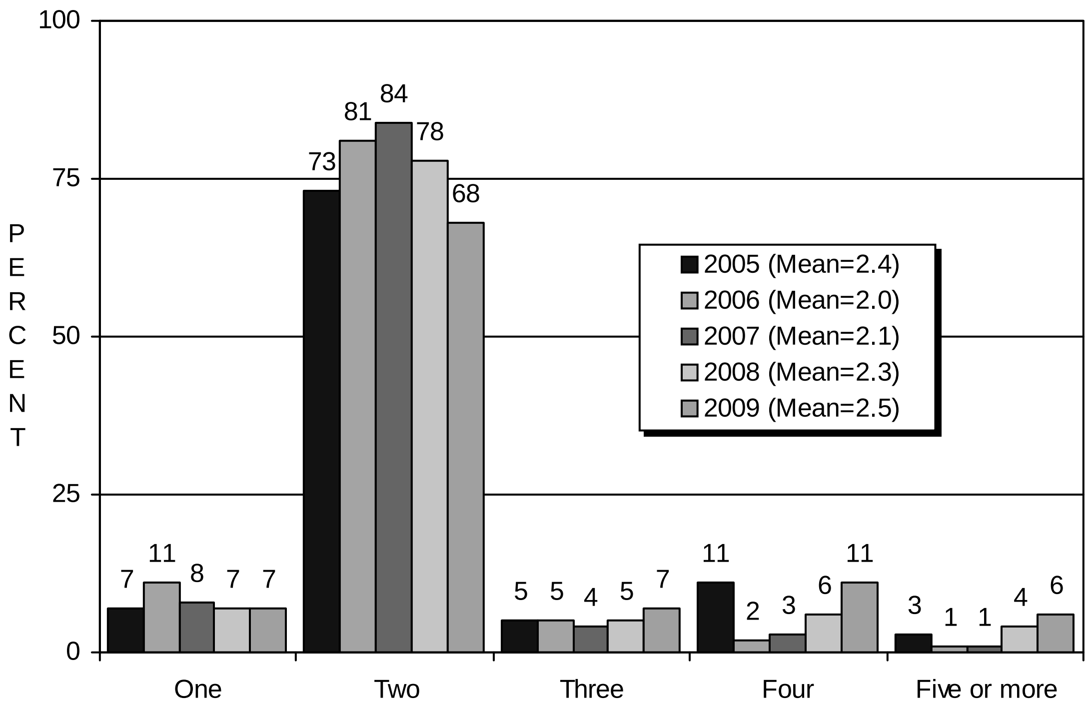
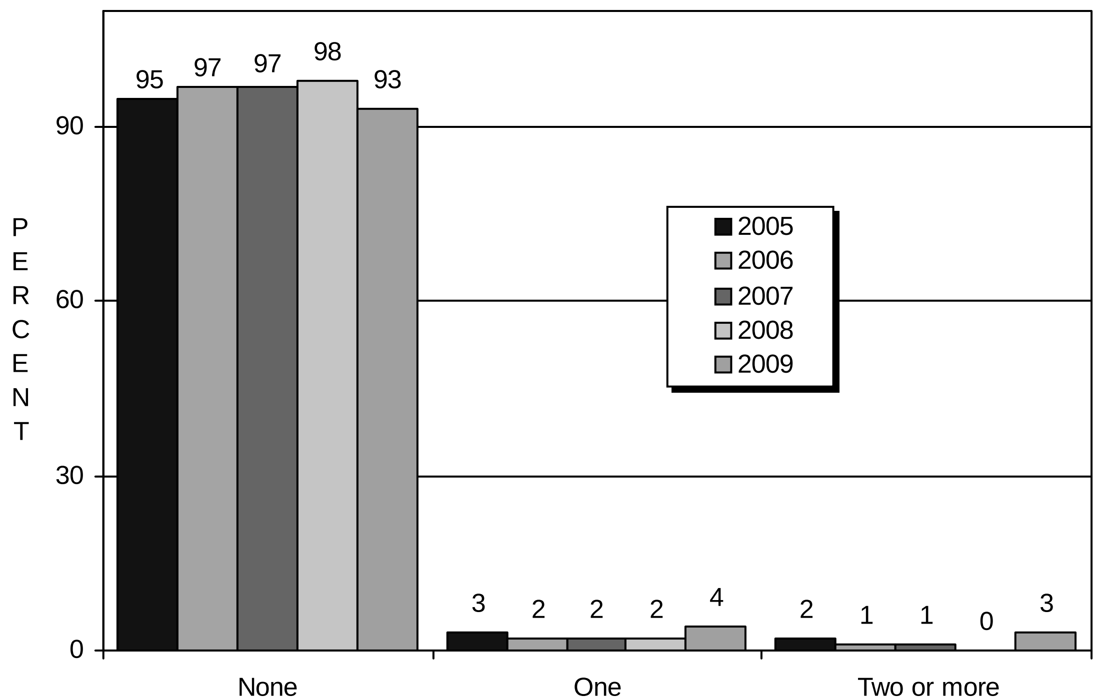


FIGURE 33
Number Of Persons In Immediate Party Under Age 21



We asked visitors how many people under 21 years old were in their immediate party (Figure 33). Almost all visitors (93%) reported no one under 21 in their party, though this was down from 97% each in 2006 and 2007, and 98% last year. Seven percent (7%) said their party included someone under the age of 21, up from 3% each in 2006 and 2007 and 2% last year.

FIGURE 34
Nights Stayed

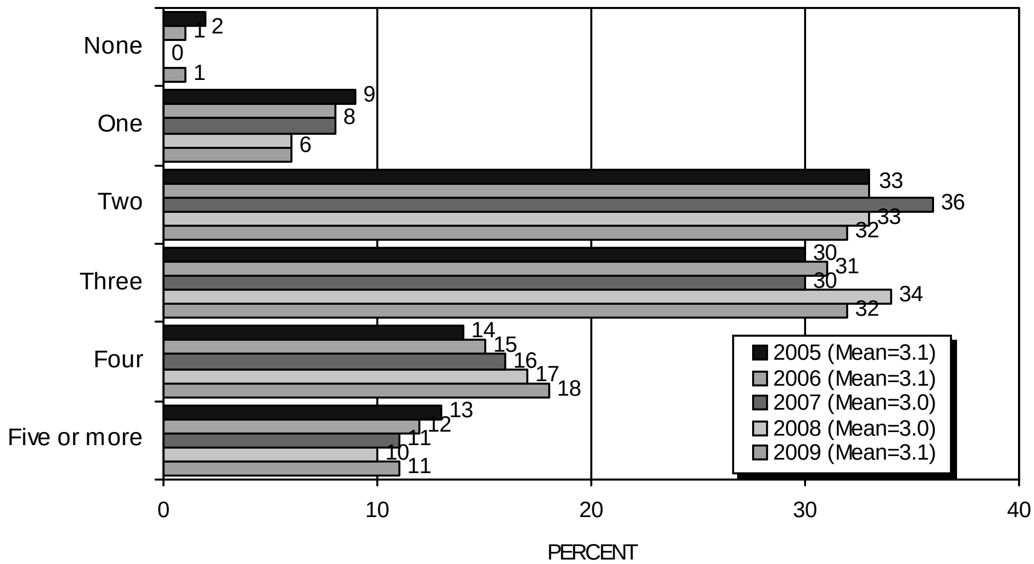
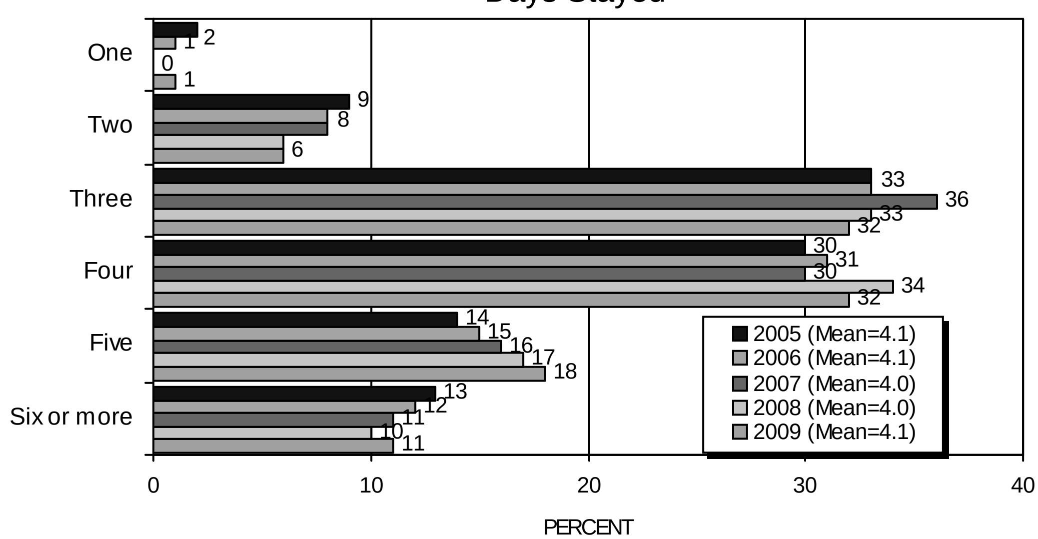
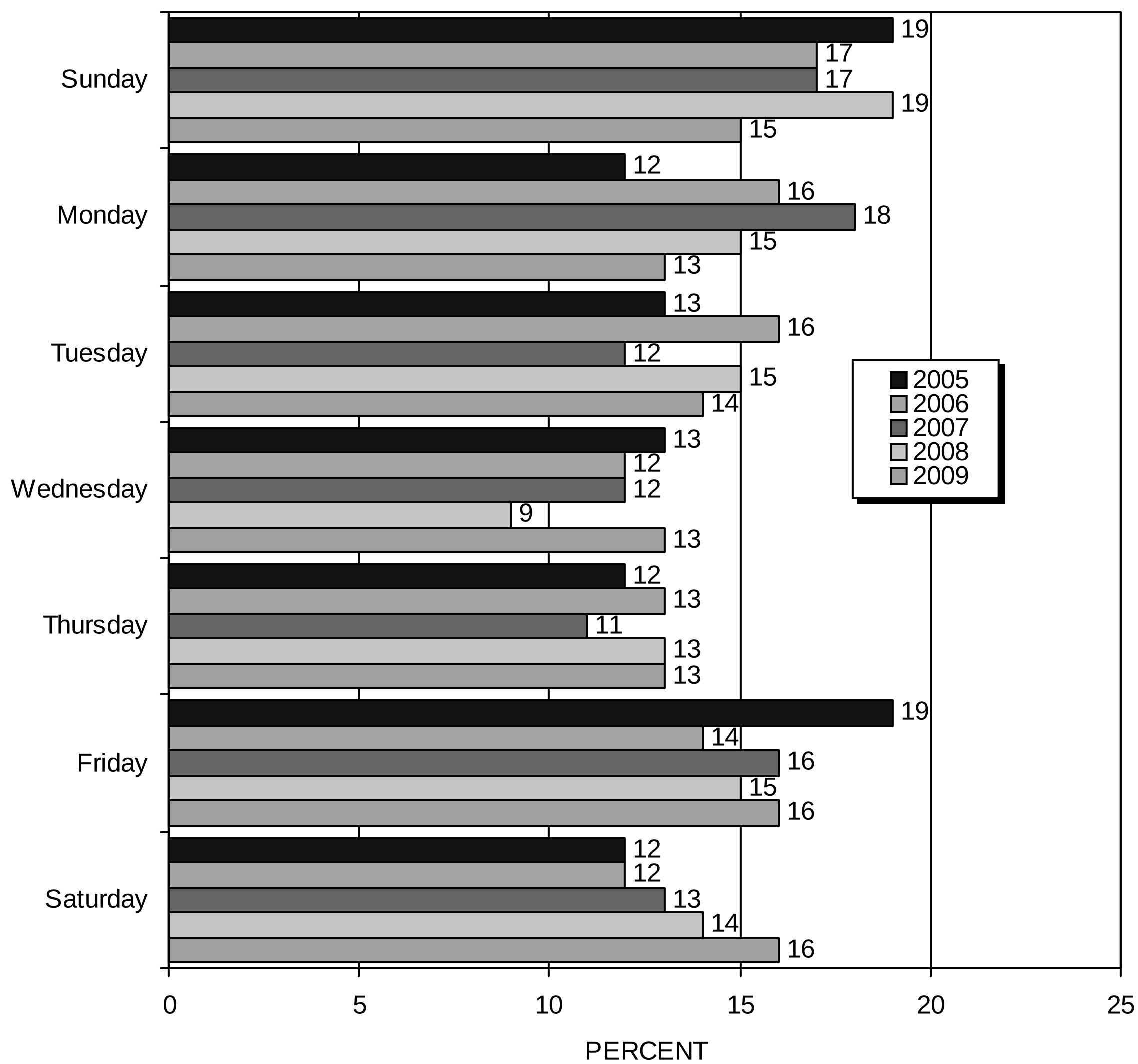


FIGURE 35
Days Stayed



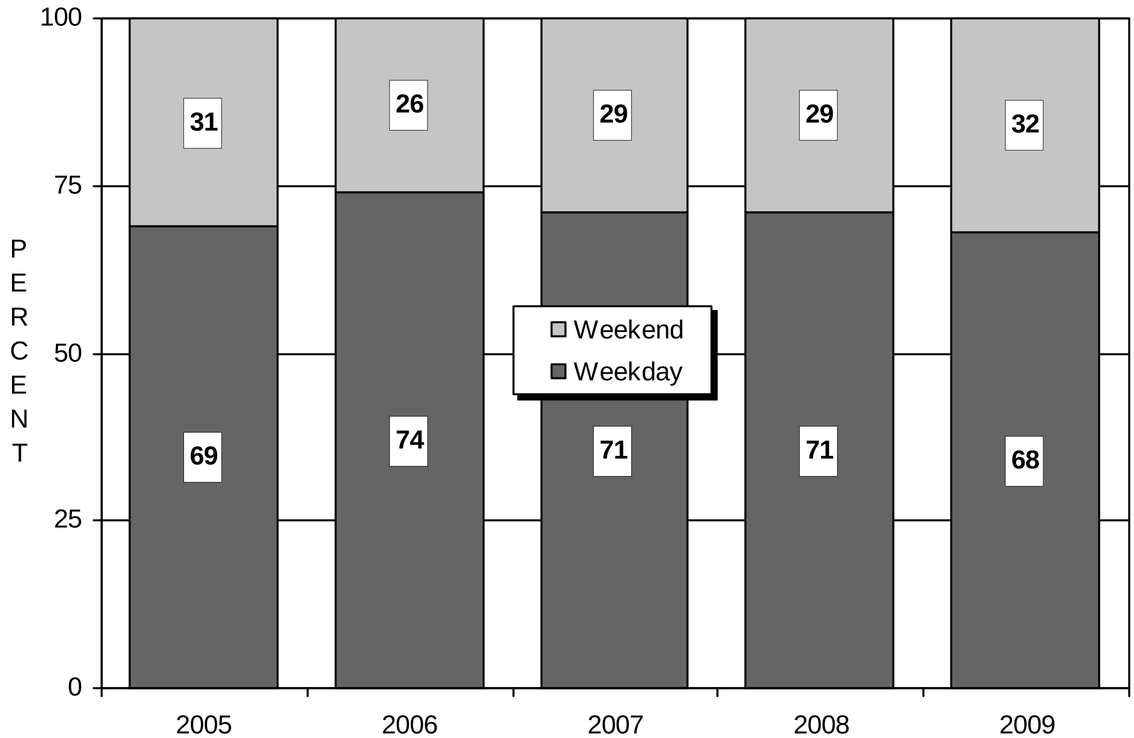
During 2009, Laughlin visitors stayed an average of 3.1 nights and 4.1 days (Figures 34 and 35).

FIGURE 36
Day Of Arrival



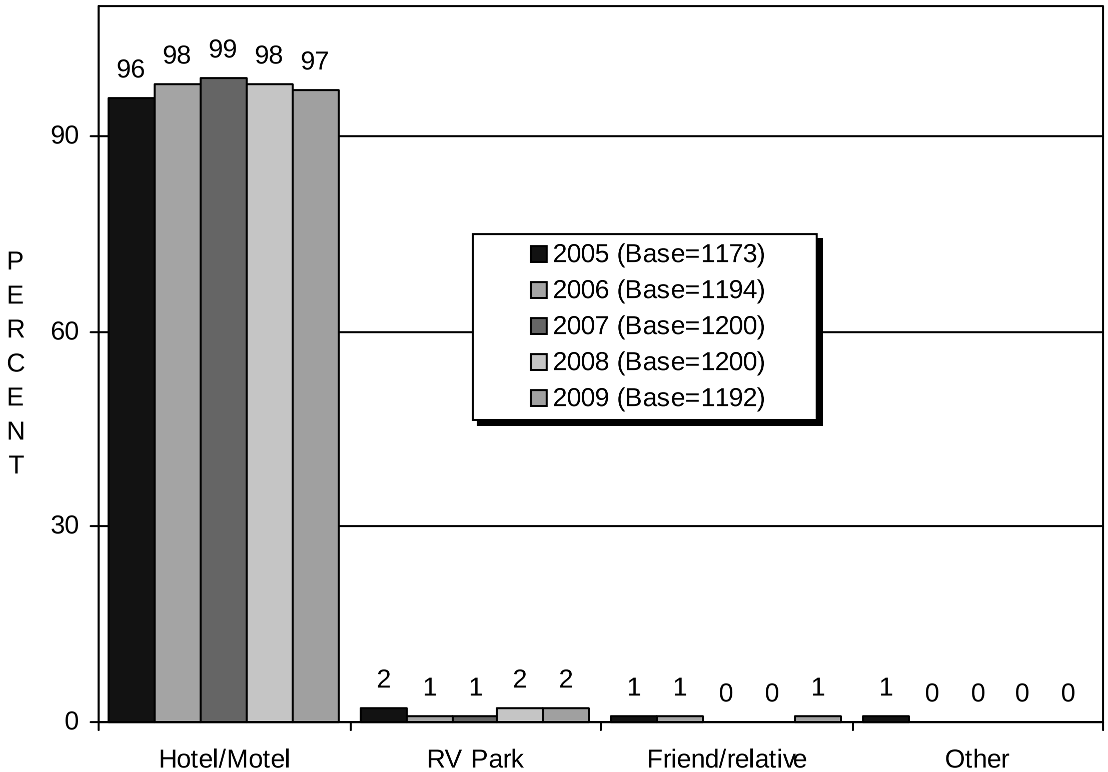
Visitors were most likely to arrive in Laughlin on a Friday or a Saturday (16% each) and least likely to arrive on a Monday, Wednesday, or a Thursday (13% each (Figure 36).

FIGURE 37
Weekend Versus Weekday Arrival



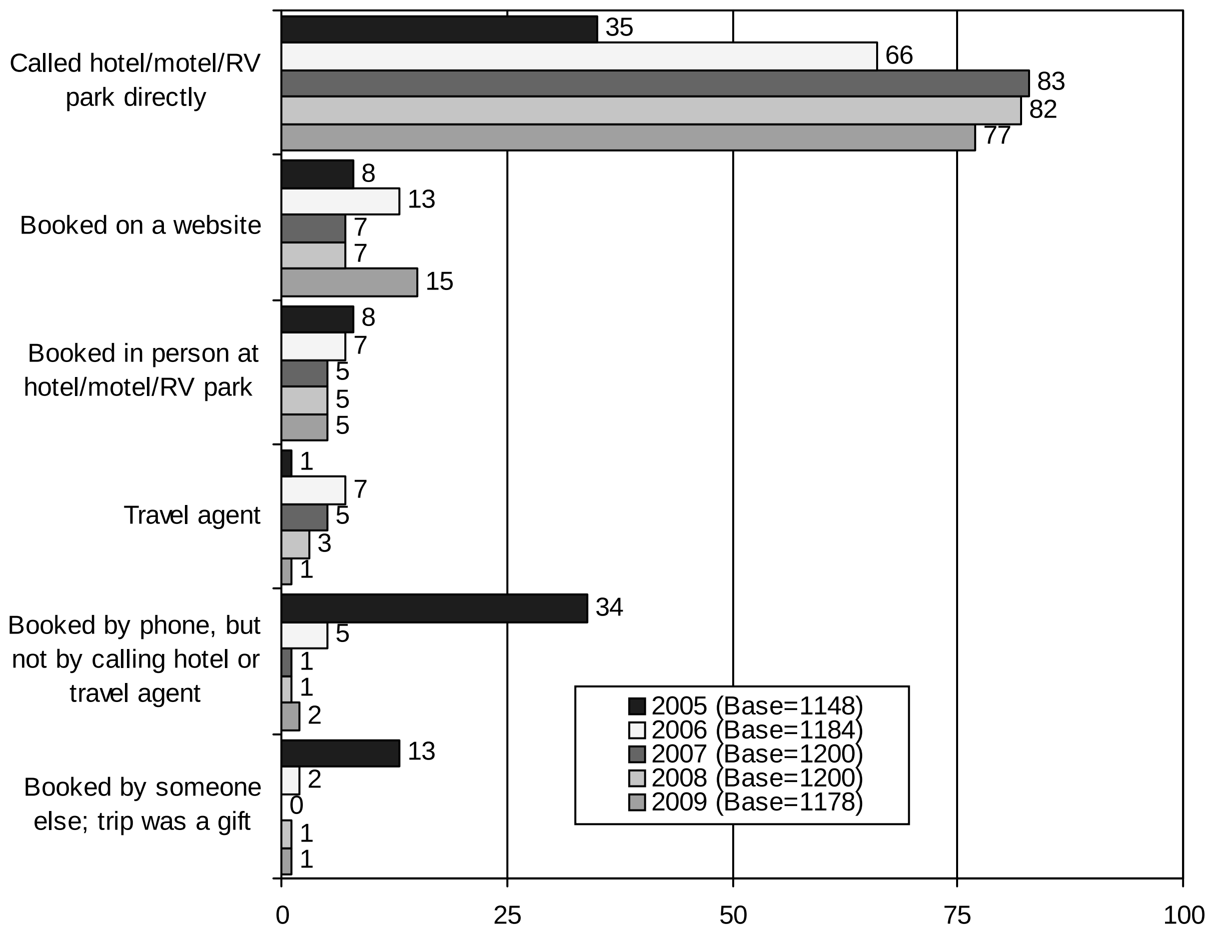
Thirty-two percent (32%) of visitors arrived in Laughlin on the weekend (Friday or Saturday), up from 26% in 2006, while 68% of visitors arrived on a weekday (Sunday through Thursday), down from 74% in 2006 (Figure 37).

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



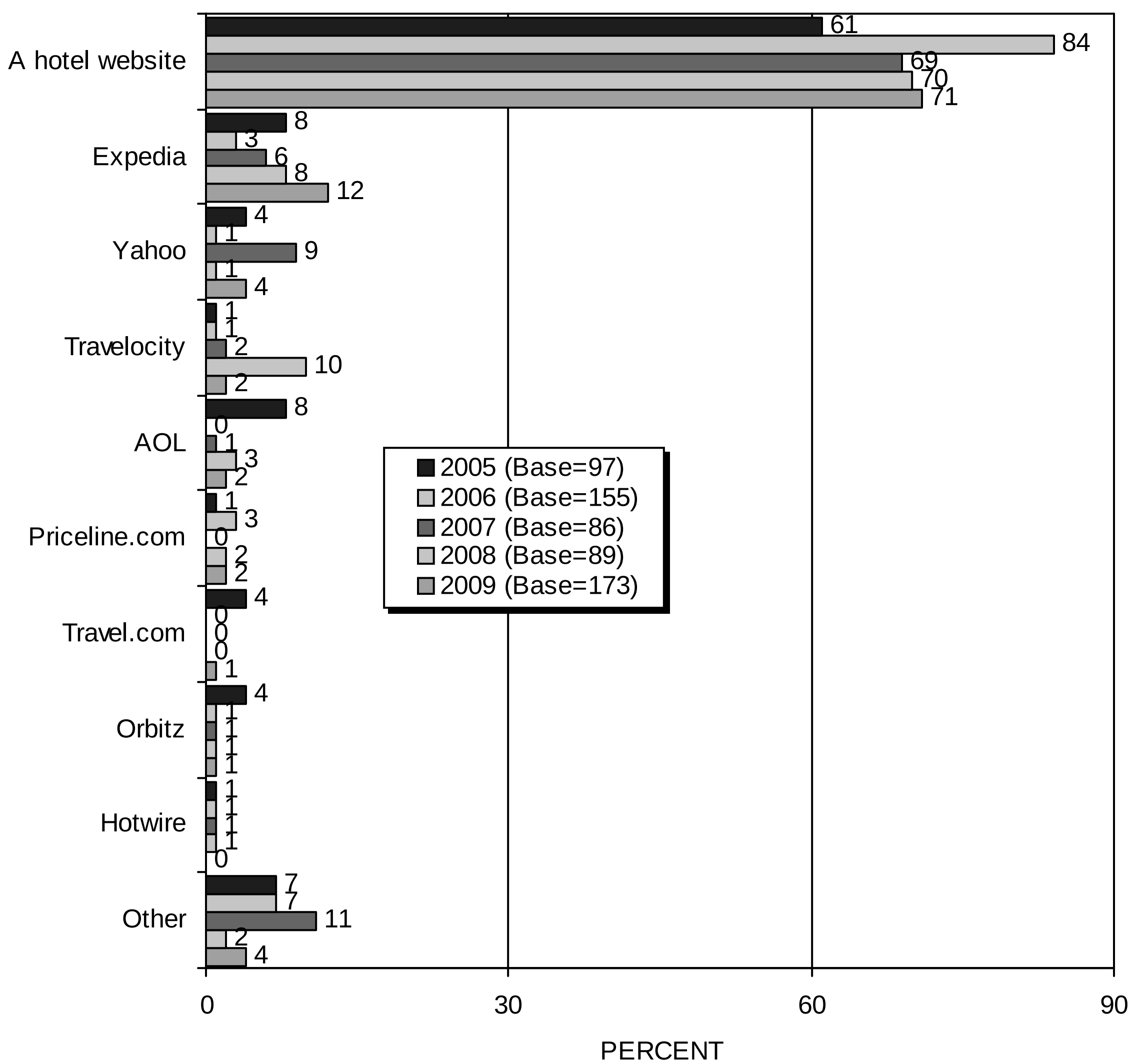
As shown in Figure 38, the proportion of visitors staying in hotels among visitors who stayed overnight was 97%, down from 99% in 2007 and 98% last year.

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



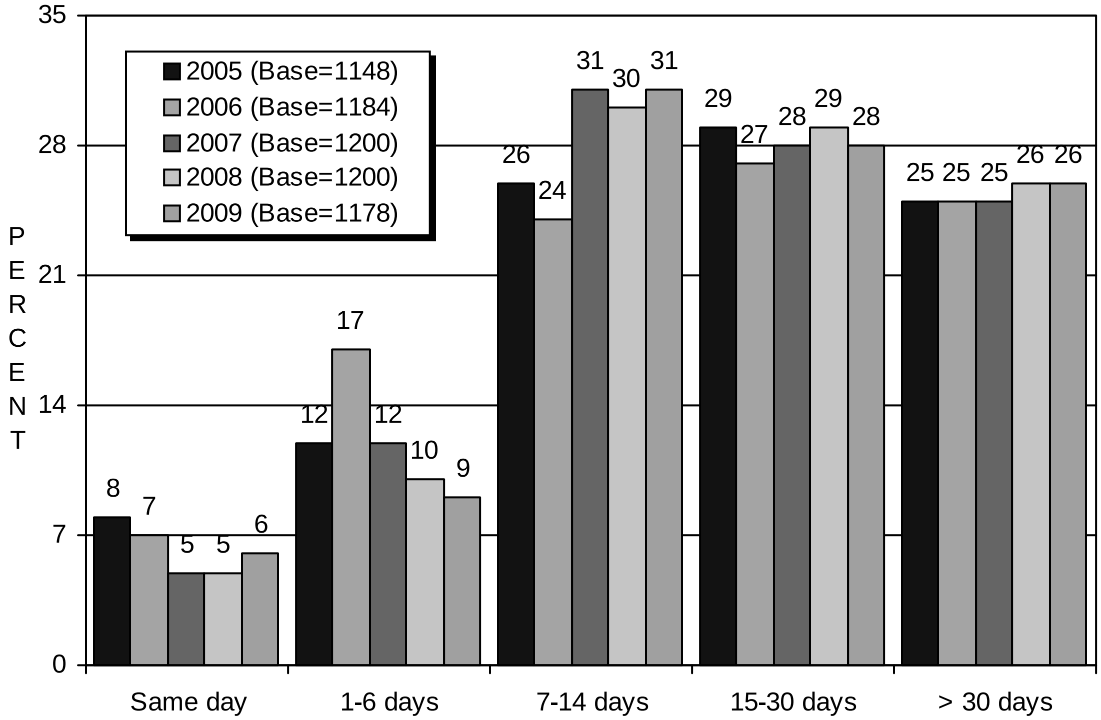
Visitors were asked how they booked their accommodations (Figure 39). In 2009, more than three in four (77%) said they booked their accommodations by calling the property directly (a significant increase from 35% in 2005 and 66% in 2006, but down from 83% in 2007 and 82% last year), 15% booked on a website (up from 8% in 2005 and 7% each in 2007 and last year), 5% booked in person (down from 8% in 2005), 1% said they booked through a travel agent (down from 7% in 2006, 5% in 2007 and 3% last year), 2% 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)



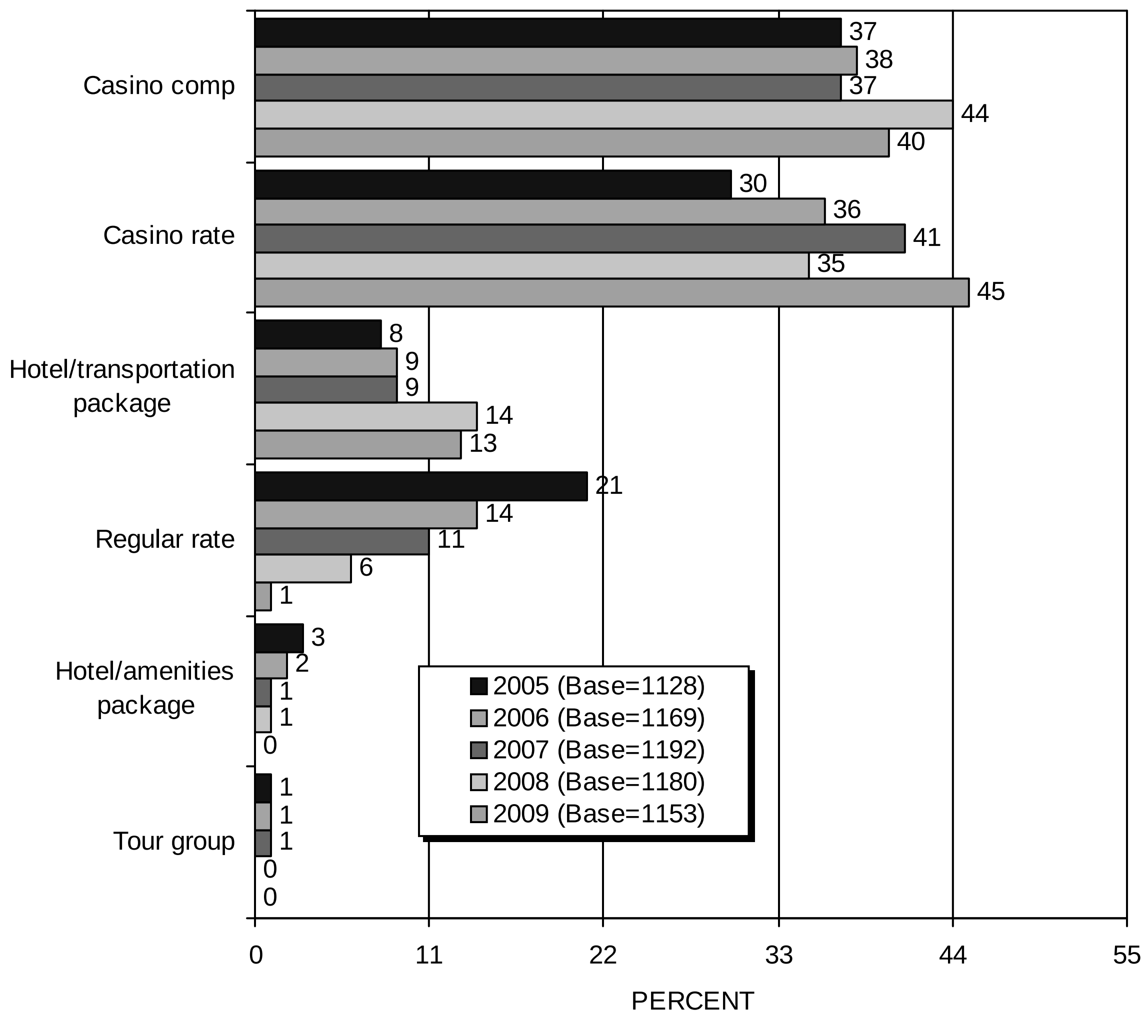
Visitors who booked their accommodations on a website were asked which one they used (Figure 40). Seven in ten (71%) said they used a hotel website to book their accommodations, a decrease from 84% in 2006. One in eight (12%) used Expedia (up from 3% in 2006), 4% booked their accommodations through Yahoo, 2% used Travelocity (down from 10% 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). Six percent (6%) of visitors booked accommodations the same day (down from 8% in 2005 and 7% in 2006), 9% booked one to six days in advance (down from 17% in 2006), 59% 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). More than eight in ten (85%) reported receiving some type of casino rate, either a casino complimentary rate (40%), or a casino rate (45%, up from prior years). Thirteen percent (13%) received a hotel-transportation package, similar to last year, but significantly greater than 2005 to 2007 readings. Just 1% said they received a regular room rate, down significantly from all prior years.

FIGURE 43
Room Rate By Booking Method
(2009)

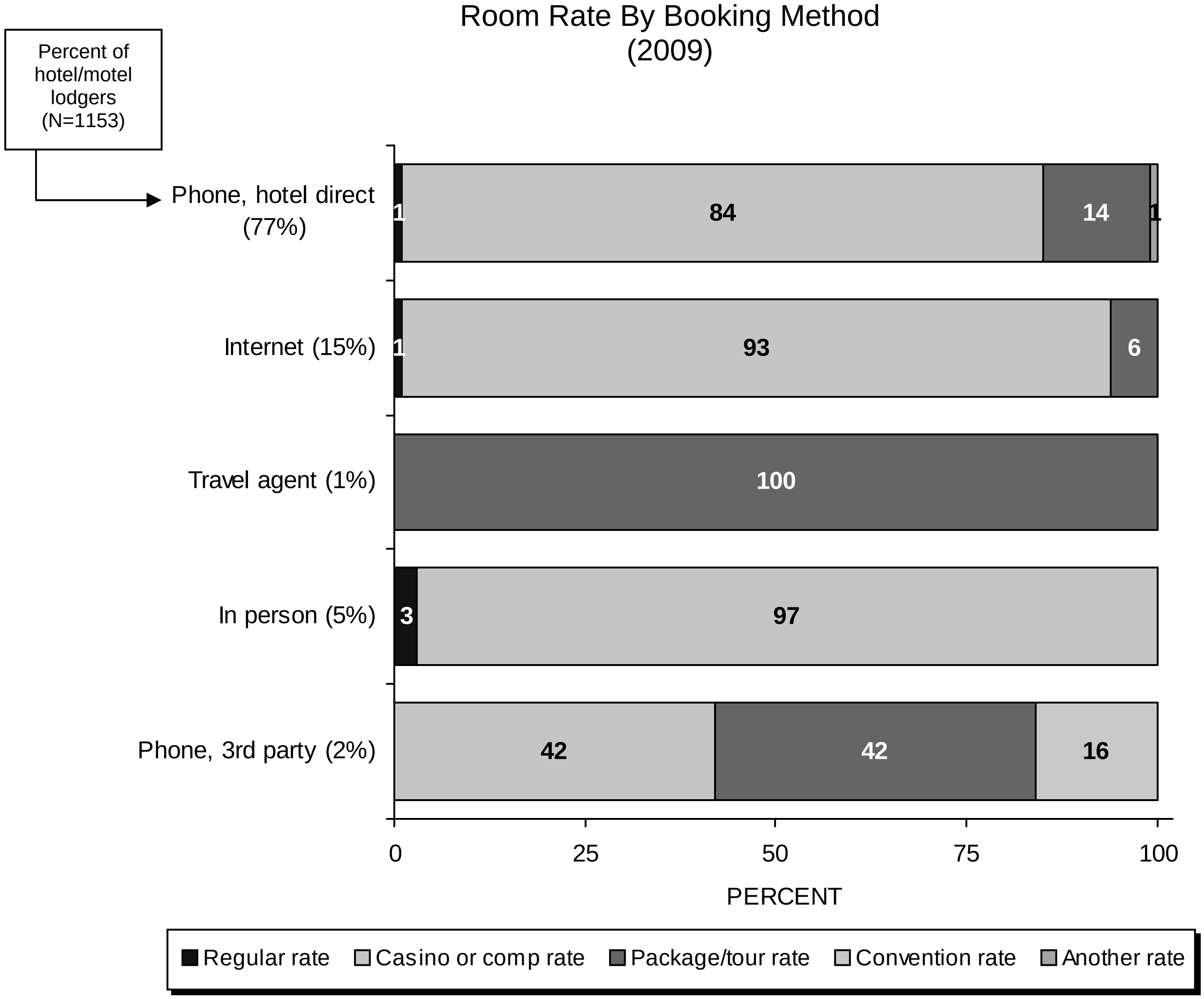
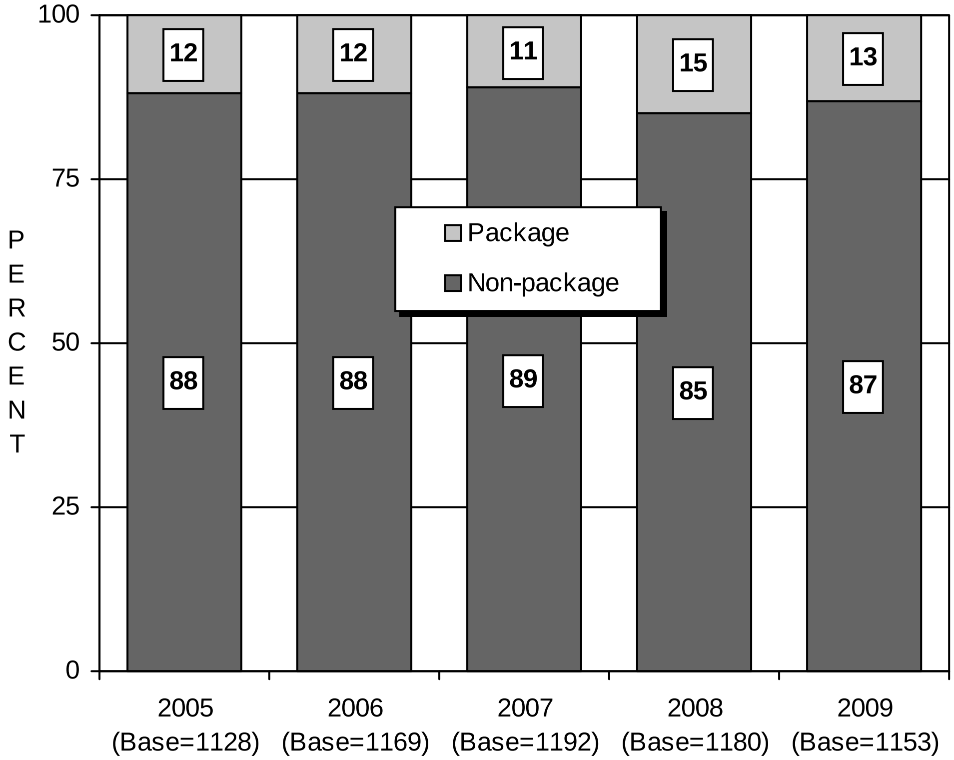


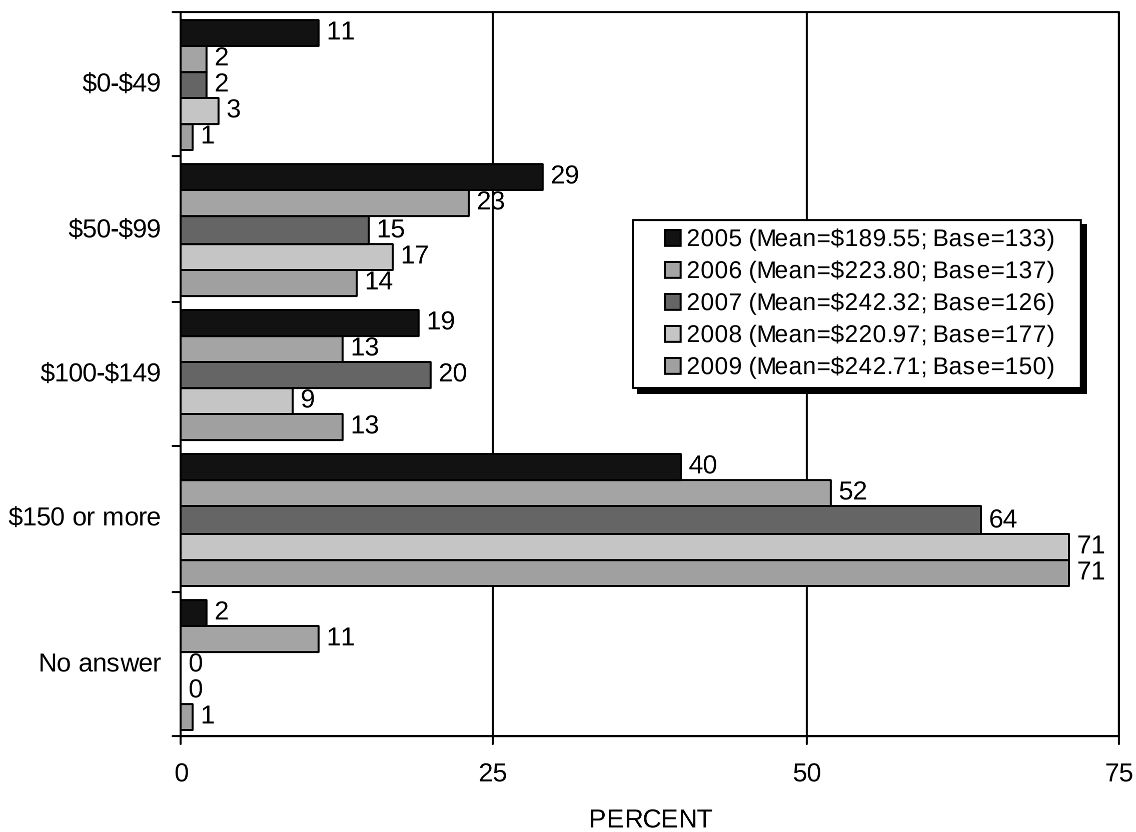
Figure 43 shows the room rate category by the booking method for 2009 among those staying in a hotel or motel. More than eight in ten (84%) of those who called the hotel directly received a casino or casino complimentary rate, while 14% received a package or tour rate. More than nine in ten of those who booked on the Internet (93%) or in person (97%) also received a casino or casino complimentary rate. All of those who booked through a travel agent (100%) received a package or tour rate. Among those who booked on the phone through a third party, 42% received a casino or casino complimentary rate and another 42% received a package or tour rate, while 16% received a convention rate.

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



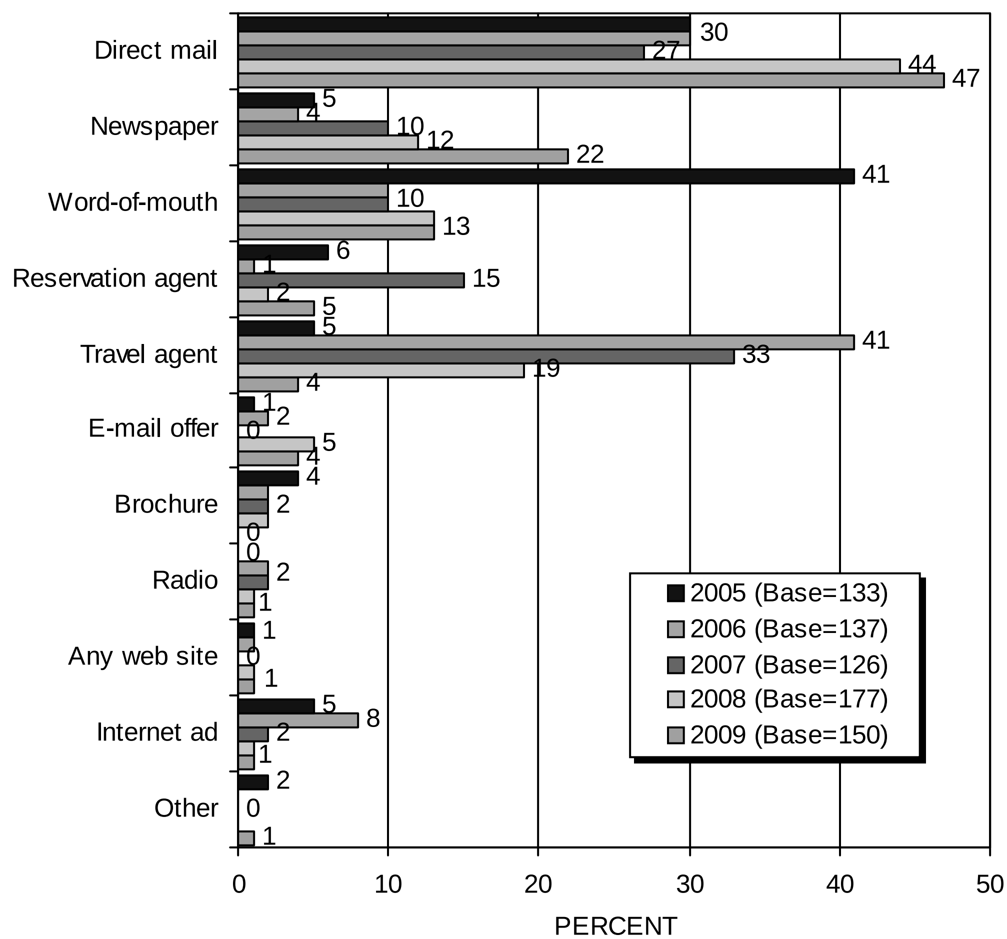
In 2009, 13% received their lodging as part of a package deal, not significantly different from past years (Figure 44).

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



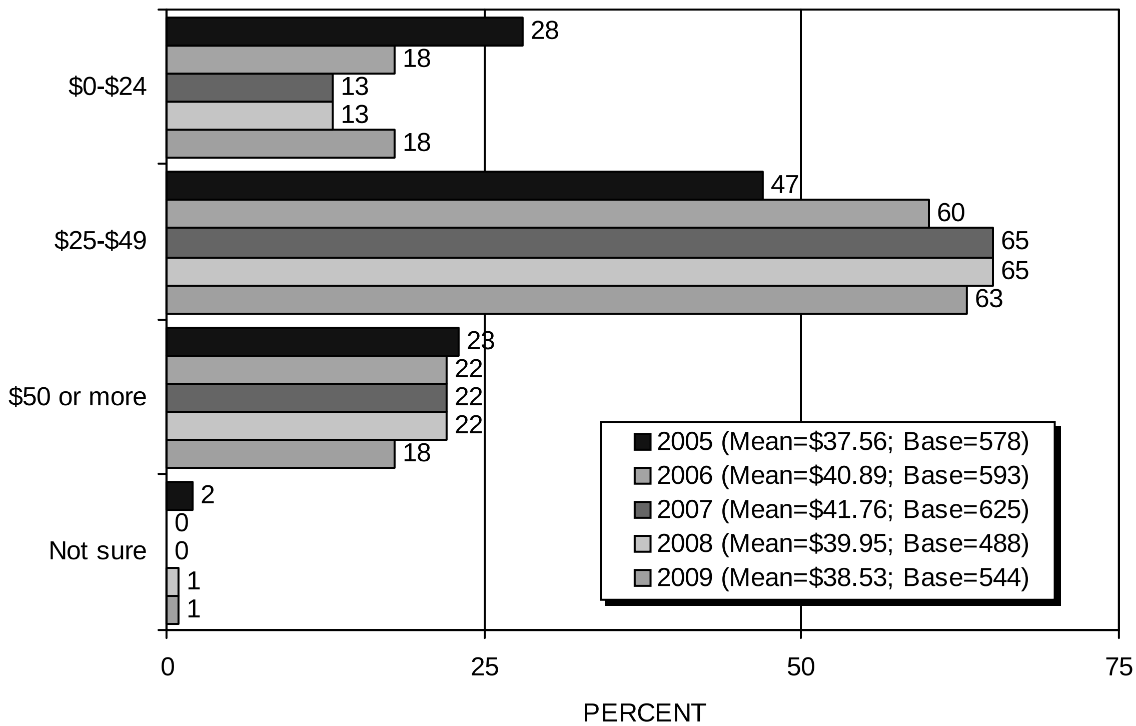
We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 45). More than seven in ten (71%) said they paid $150 or more for their package (a significant increase from 40% in 2005, and 52% in 2006). Fourteen percent (14%) paid $50 to $99 (down from 29% in 2005), 13% paid $100 to $149 (down from 19% in 2005 and 20% in 2007), and 1% paid less than $50 (down from 11% in 2005). The average package cost was $242.71, up from $189.55 in 2005, but not significantly different from 2006 to 2008 averages.

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



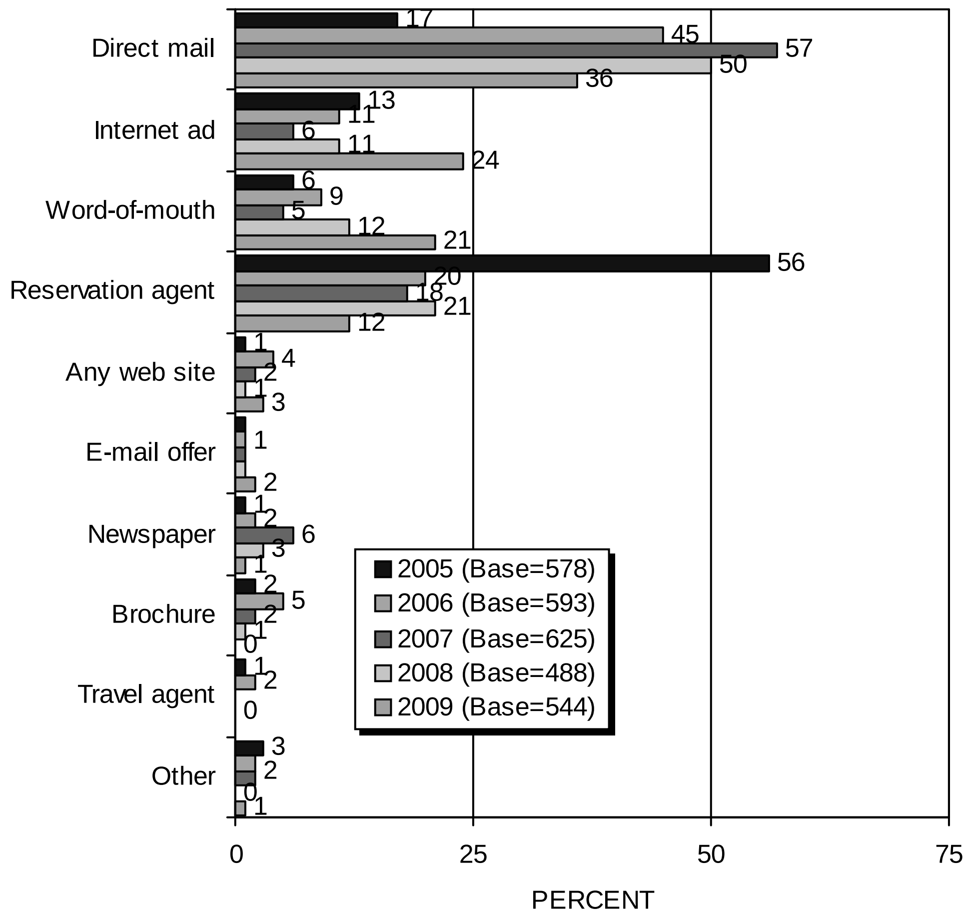
Package purchasers were asked how they first found out about the package they bought for their trip to Laughlin (Figure 46). Forty-seven percent (47%) said they received an offer through the mail (up significantly from 30% each in 2005 and 2006 and 27% in 2007). Just over one in five (22%) said they first found out about the package in a newspaper (up from prior readings), 13% heard about the offer through word-of-mouth (down from 41% in 2005), 5% from a reservation agent (up from 1% in 2006, but down from 15% in 2007), and 4% each heard about the package through a travel agent (down from 41% in 2006, 33% in 2007, and 19% last year) or an e-mail offer. Less than 2% each found out about the package through either an internet ad, the radio, any website, or other sources.

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



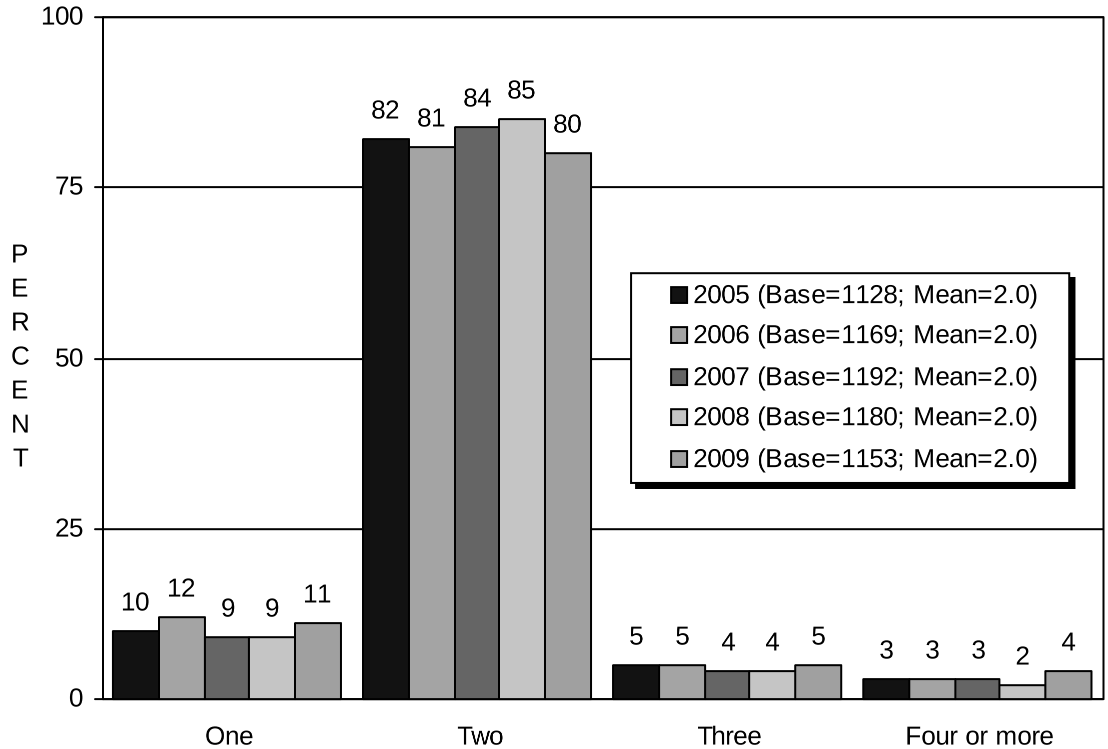
The average reported room cost among non-package hotel and motel lodgers in 2009 was $38.53, similar to last year, but down significantly from $40.89 in 2006 and $41.76 in 2007 (Figure 47).

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



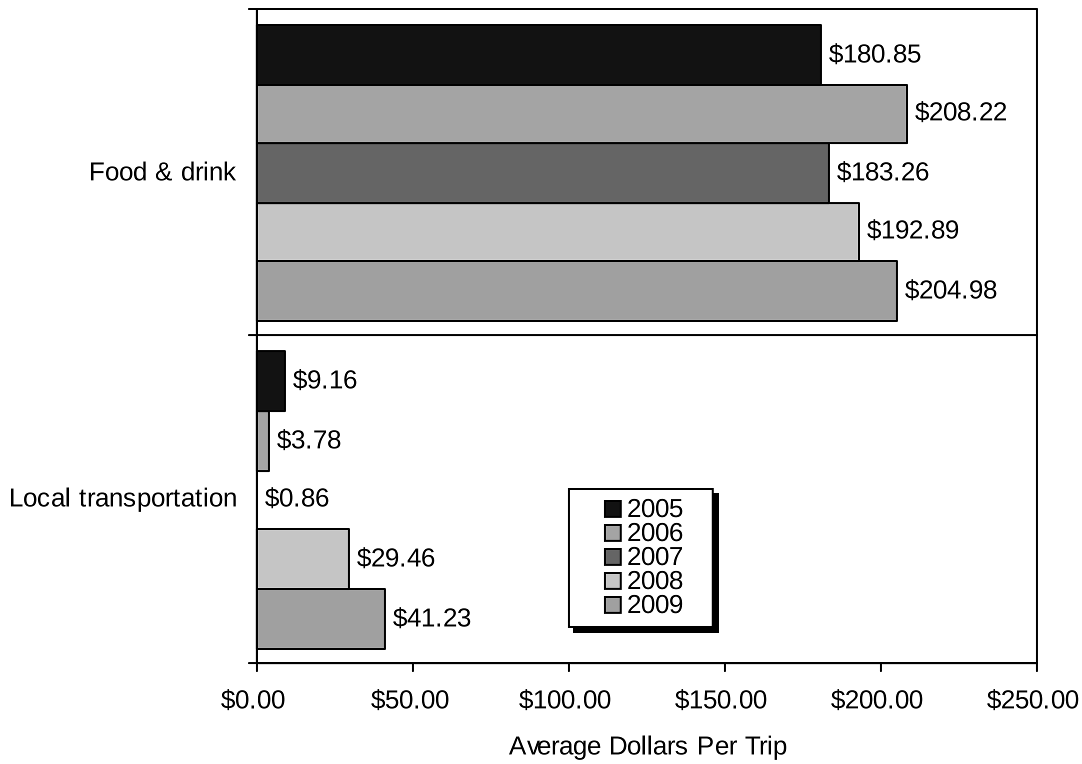
Non-package hotel and motel lodgers were asked how they first found out about the room rate they paid (Figure 48). Over one-third (36%) said they received an offer in the mail, a significant increase from 17% in 2005, but down from 45% in 2006, 57% in 2007, and 50% last year. Nearly one in four (24%) saw an advertisement on the Internet (up from past years), while 21% said they heard about it through word of mouth, also up from prior readings. Twelve percent (12%) said they first heard of their room rate from a reservation agent or through a call center, down significantly from 56% in 2005, 20% in 2006, 18% in 2007, and 21% last year. Three percent (3%) said they heard about it through a web site, (up from 1% each in 2005 and 2008), while 2% heard about the rate from an e-mail offer.

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



As Figure 49 shows, the majority of visitors (80%) 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.

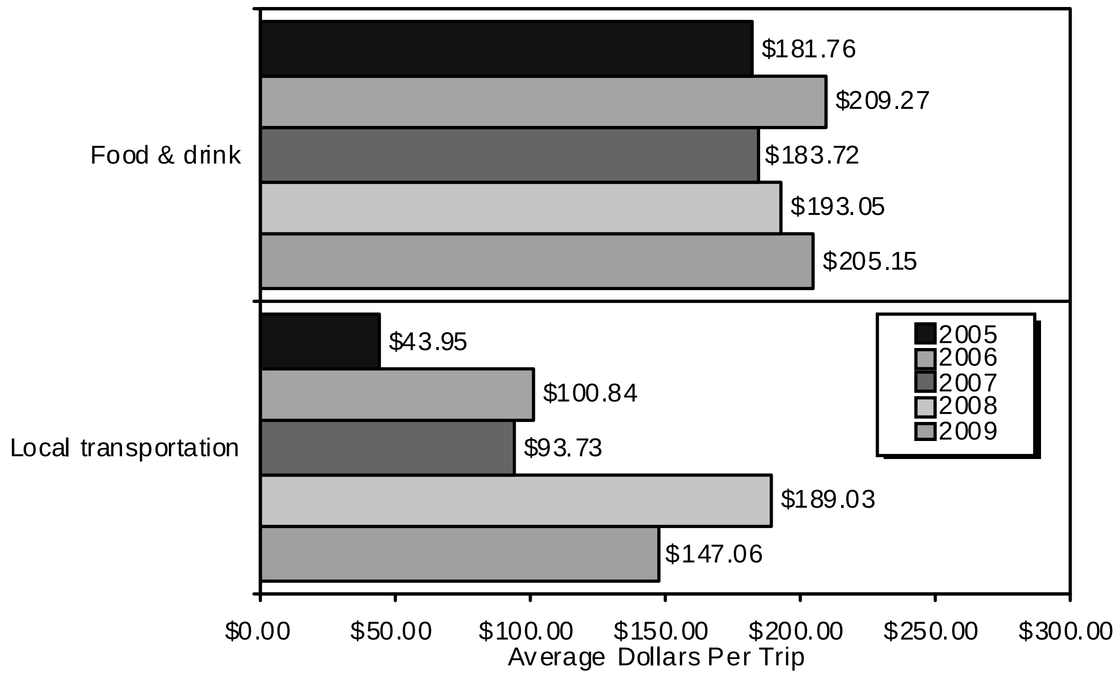
Figure 50 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In the current study, the average food and drink expenditures were $204.98 per trip, up from $180.85 in 2005, $183.26 in 2007, and $192.89 last year. The average local transportation expenditures were $41.23 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)



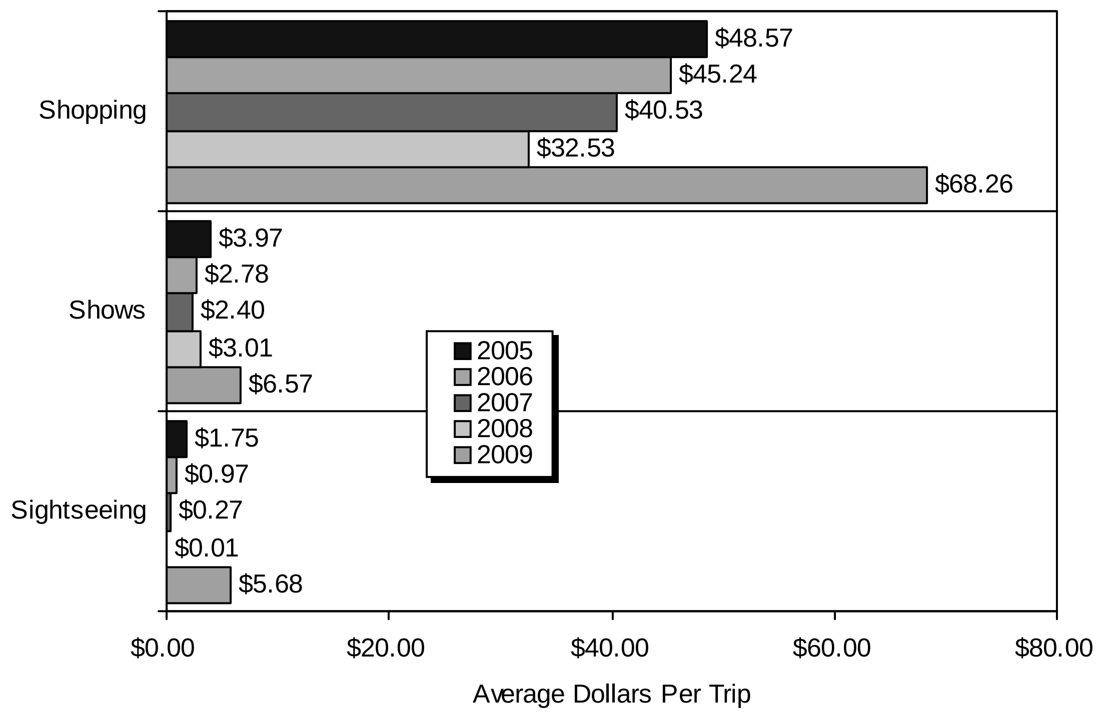
Among visitors who indicated they spent money in these categories, average food and drink expenditures in the current study were $205.15 per trip, up significantly from $181.76 in 2005, $183.72 in 2007, and $193.05 last year (Figure 51). Average local transportation expenditures were $147.06 per trip, up substantially from $43.95 in 2005 and $100.84 in 2006.

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

	2005	2006	2007	2008	2009
Food and drink					
Base size	(1194)	(1194)	(1197)	(1199)	(1199)
Proportion of total	99.5%	99.5%	99.8%	99.9%	99.9%
Local transportation					
Base size	(250)	(45)	(13)	(187)	(340)
Proportion of total	21%	4%	1%	16%	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.

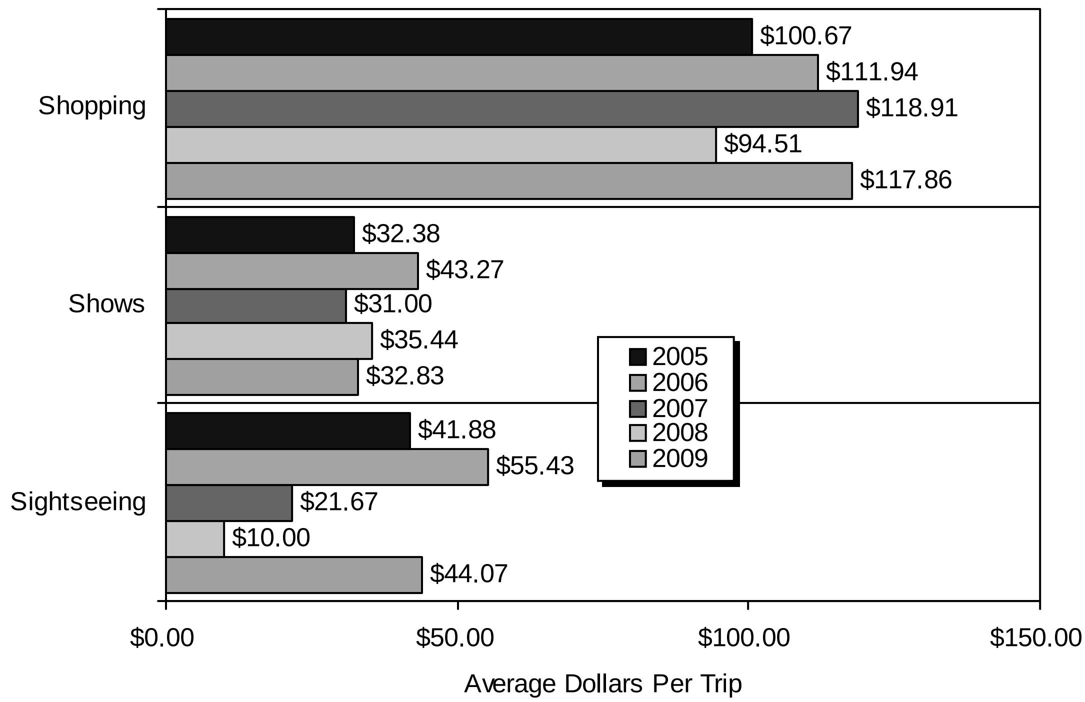
FIGURE 52
Average Trip Expenditures On Shopping, Shows, And Sightseeing*
(Including Visitors Who Spent Nothing In That Category)



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 2009 was $68.26, up significantly from all prior years. An average of $6.57 was spent on shows (up from all prior years), and an average of $5.68 was spent on sightseeing (also an increase from prior years).

* The percentage of Laughlin visitors who reported spending money on shopping, shows, and sightseeing all increased significantly over past years, leading to higher average expenditures among all visitors in each category.

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 2009 was $117.86, up from $100.67 in 2005 and $94.51 in 2008 (Figure 53). The average spent on shows was $32.83, down from $43.27 in 2006. The average spent on sightseeing was $44.07, up from $21.67 in 2007.

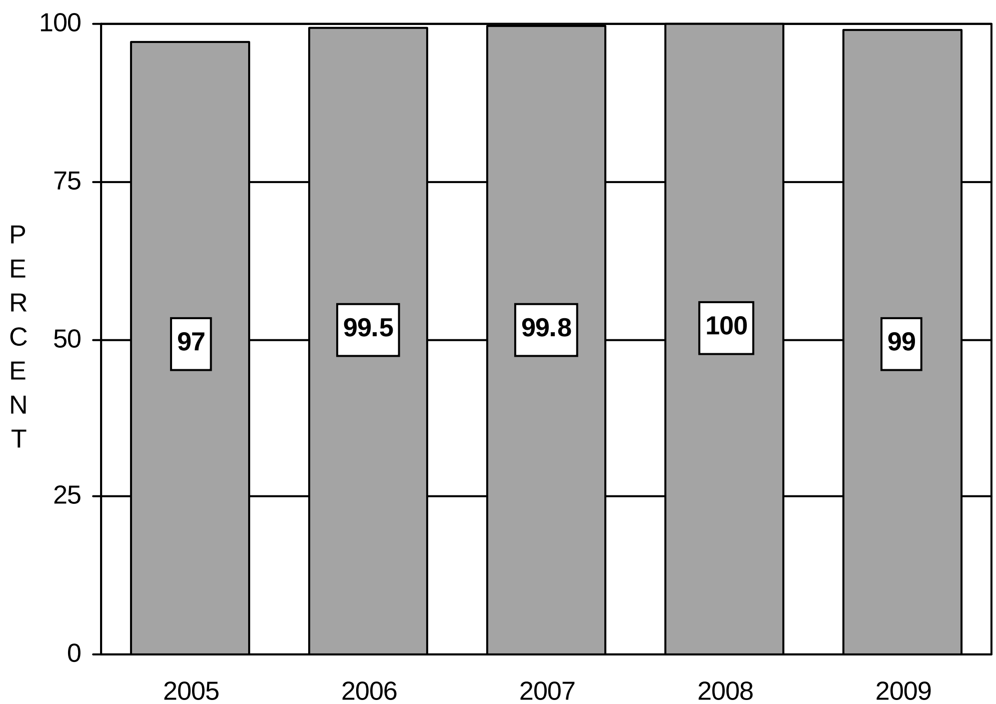
Percentages of visitors who spent money in each category are shown in the following table:

	2005	2006	2007	2008	2009
Shopping					
Base size	(579)	(485)	(409)	(413)	(695)
Proportion of total	40%	40%	34%	34%	34%
Shows					
Base size	(147)	(77)	(93)	(102)	(240)
Proportion of total	12%	6%	8%	9%	9%
Sightseeing					
Base size	(50)	(21)	(15)	(1)	(165)
Proportion of total	4%	2%	1%	0.1%	0.1%

GAMING BEHAVIOR AND BUDGETS

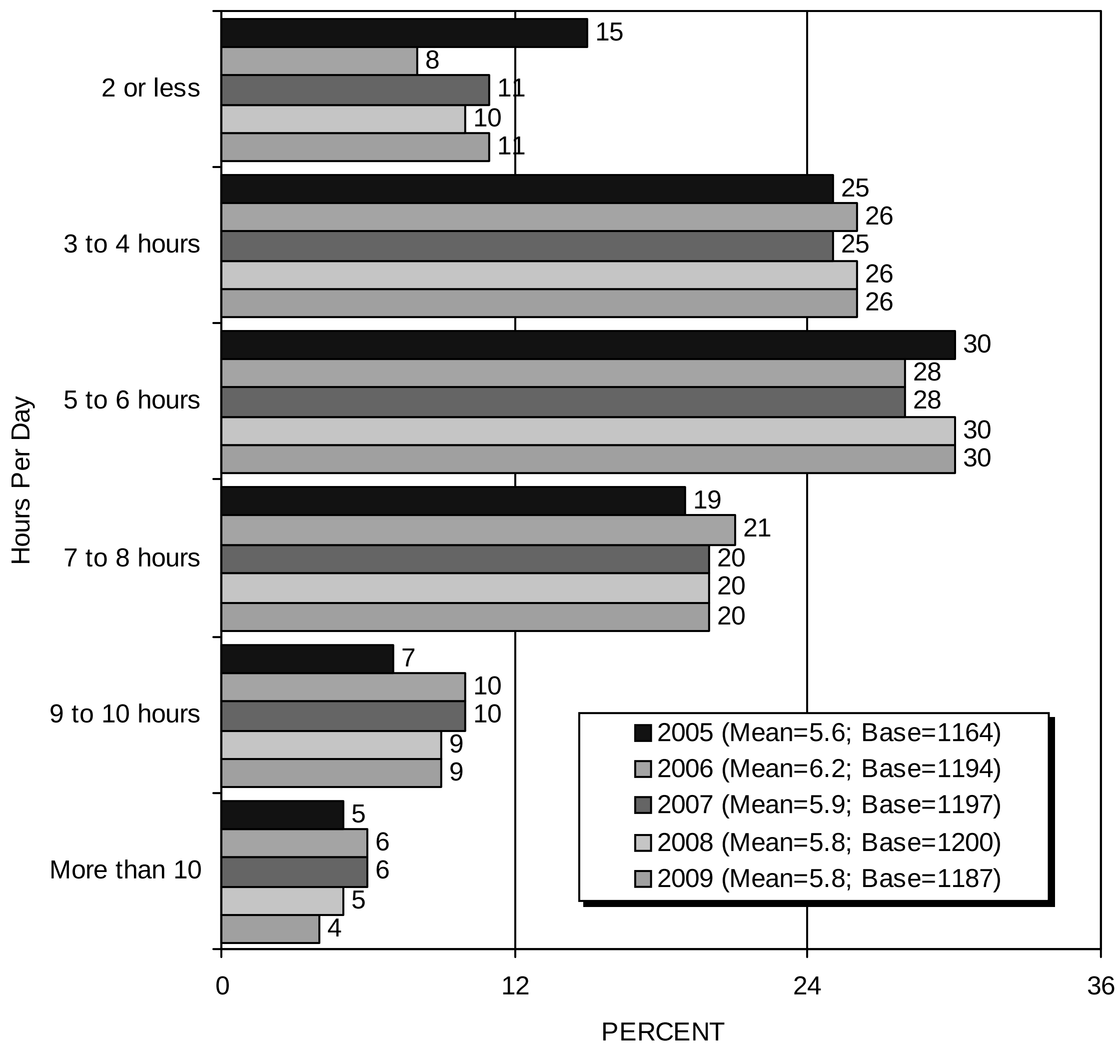
Nearly all Laughlin visitors in the current study (99%) said they gambled during their visit, a decrease from last year (when all respondents gambled), but an increase from 97% in 2005 (Figure 54).

FIGURE 54
Whether Gambled While In Laughlin*



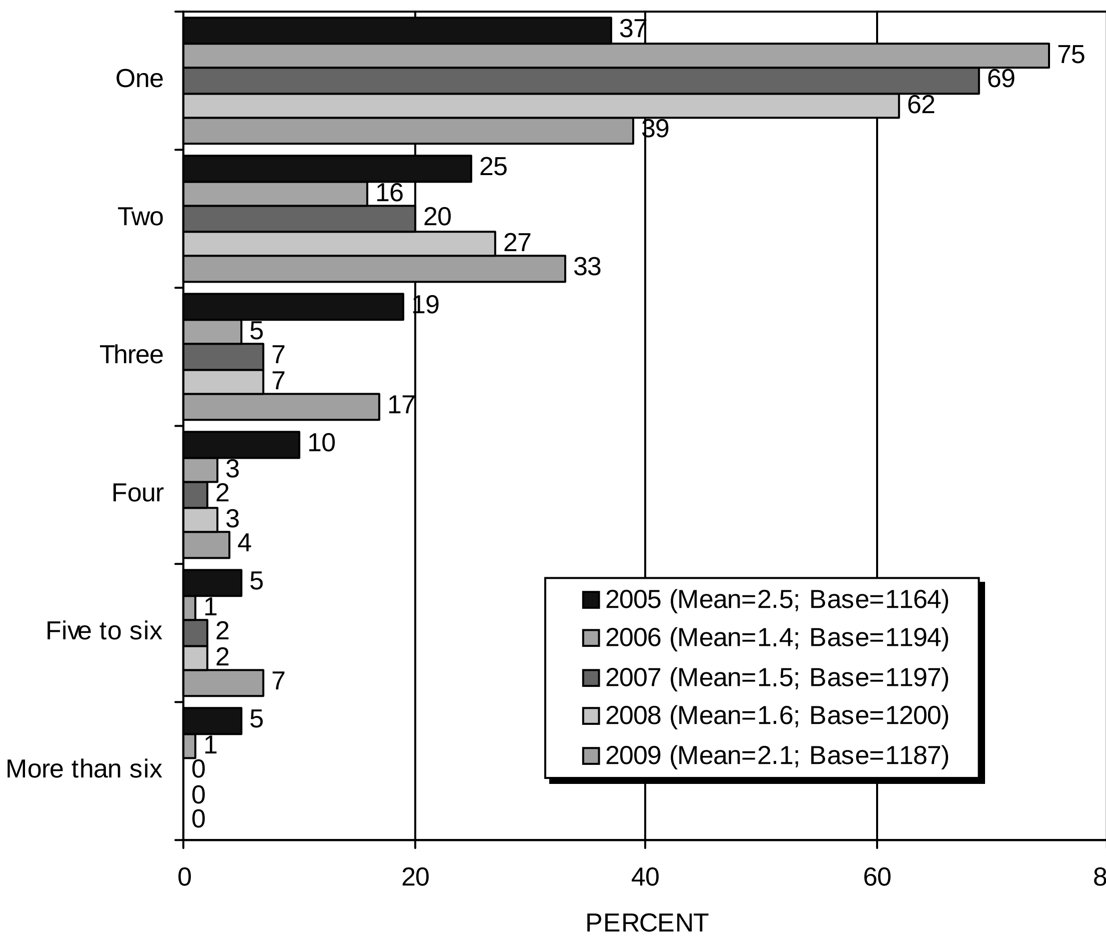
* Only “yes” responses are reported in this chart.

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



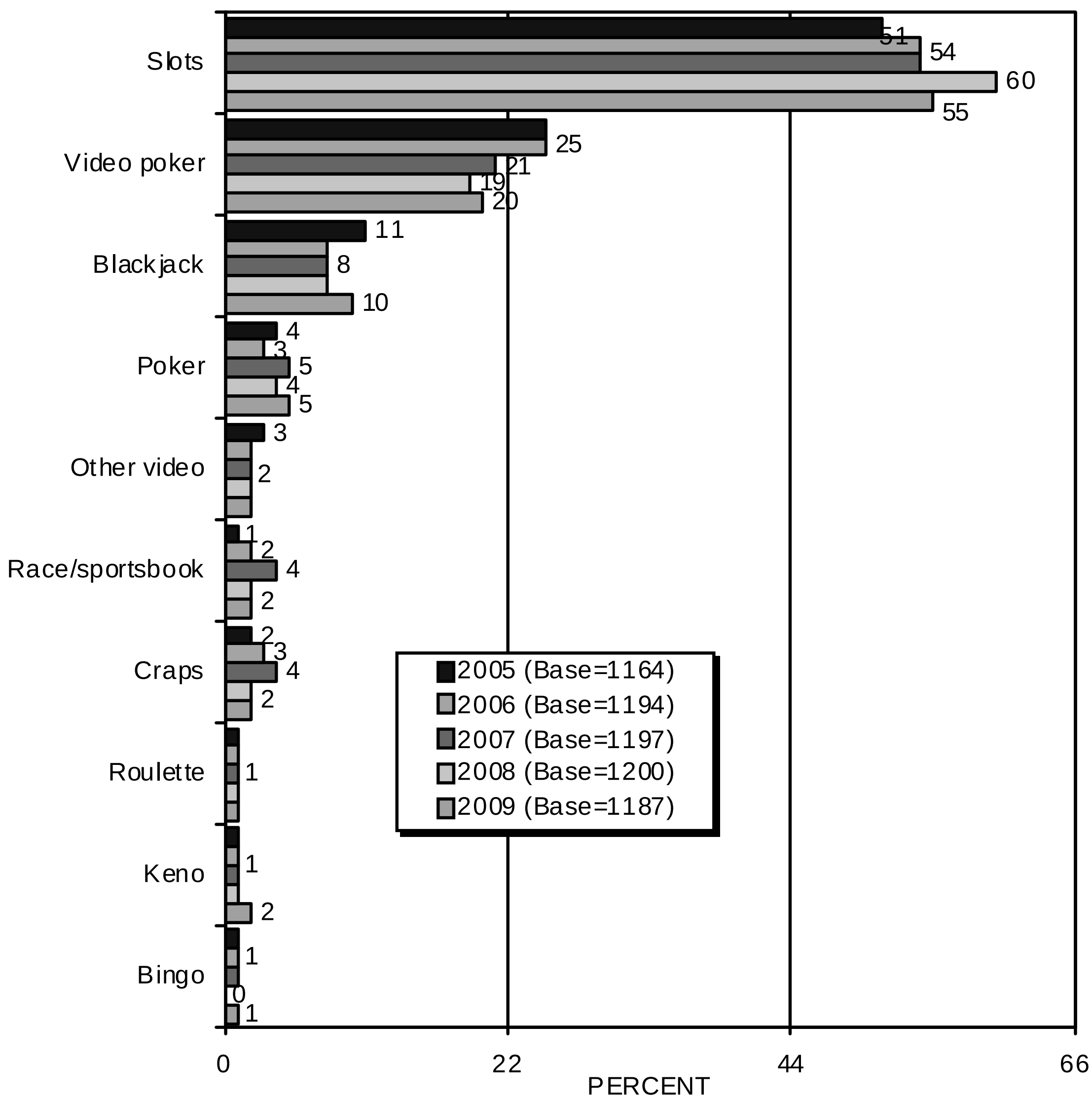
In 2009, Laughlin visitors who gambled said they spent an average of 5.8 hours doing so, up significantly from 5.6 hours in 2005 but down from 6.2 hours in 2006 (Figure 55).

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



In 2009, gamblers reported gambling at an average of 2.1 casinos during their stay in Laughlin, a significant decrease from 2.5 casinos in 2005, but an increase from 1.4 casinos in 2006, 1.5 casinos in 2007, and 1.6 casinos last year (Figure 56).

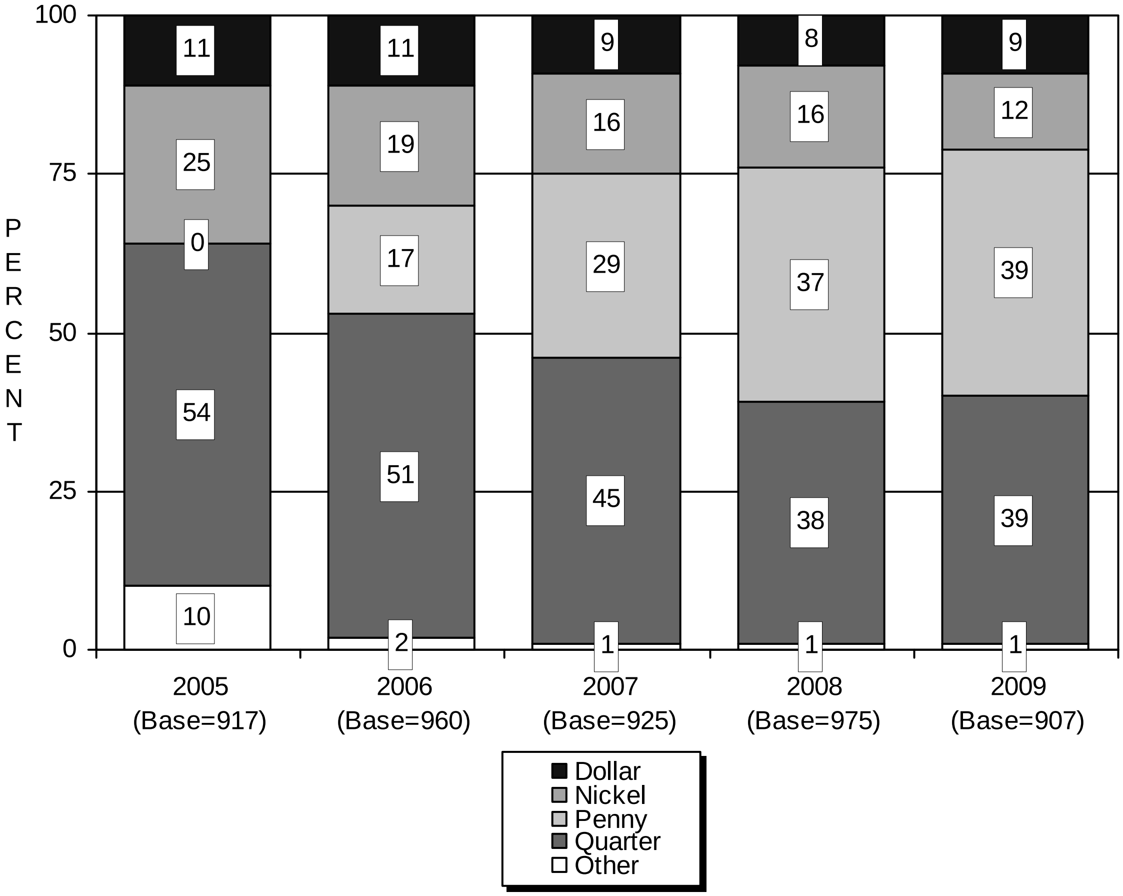
FIGURE 57
Casino Game Played Most Often*
(Among Those Who Gambled)



As Figure 57 shows, more than one-half (55%) of gamblers in 2009 played slot machines most often, down from 60% last year. Two in ten (20%) said they played video poker machines most often (down from 25% in both 2005 and 2006), followed by 10% who said blackjack. Five percent (5%) played poker most often, up from 3% in 2006. Two percent (2%) played craps most often, down significantly from 4% in 2007.

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

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

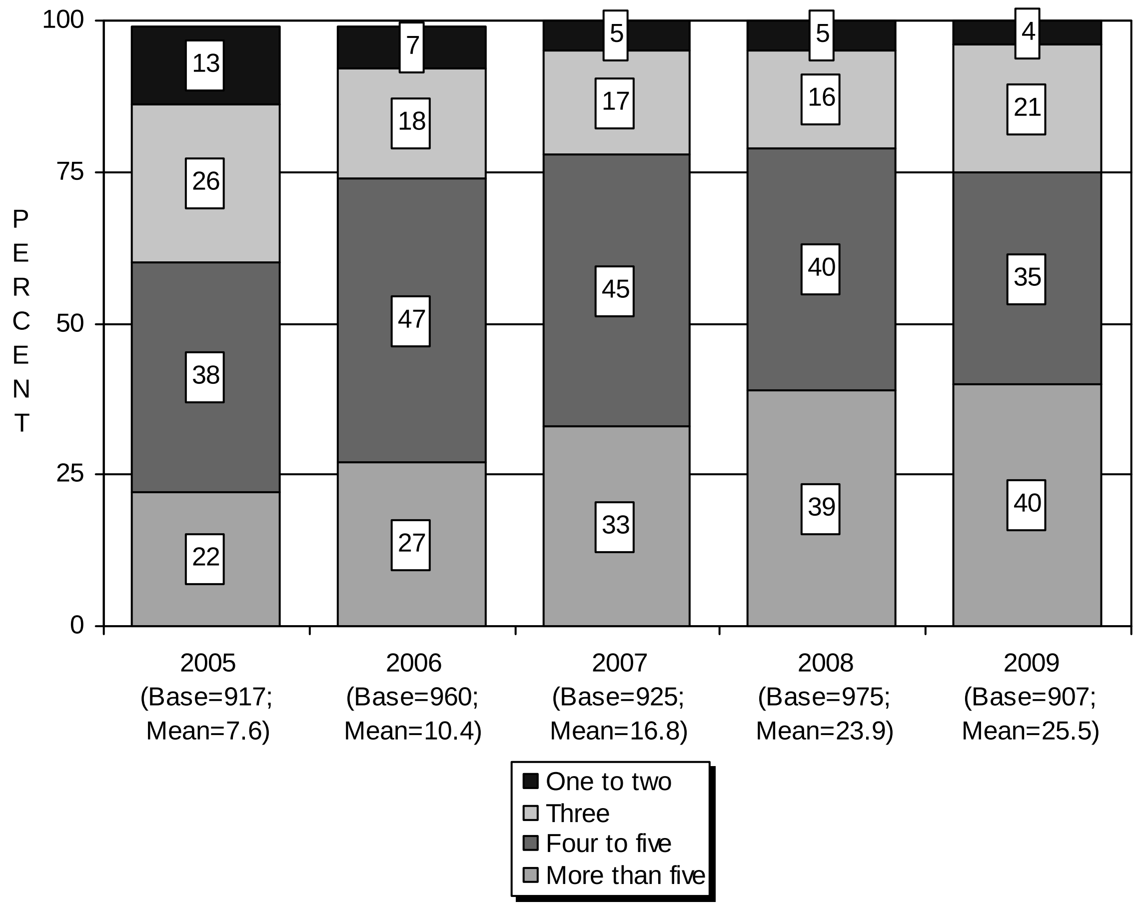


Among those who played slot and video machines in 2009 (Figure 58), 39% played quarter machines most often (down from 2005 to 2007 readings) and another 39% played penny machines most often (similar to last year but up from 17% in 2006 and 29% in 2007). Twelve percent (12%) played nickel machines most often (down from prior years), and 9% played dollar machines most often (down from 11% each 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.

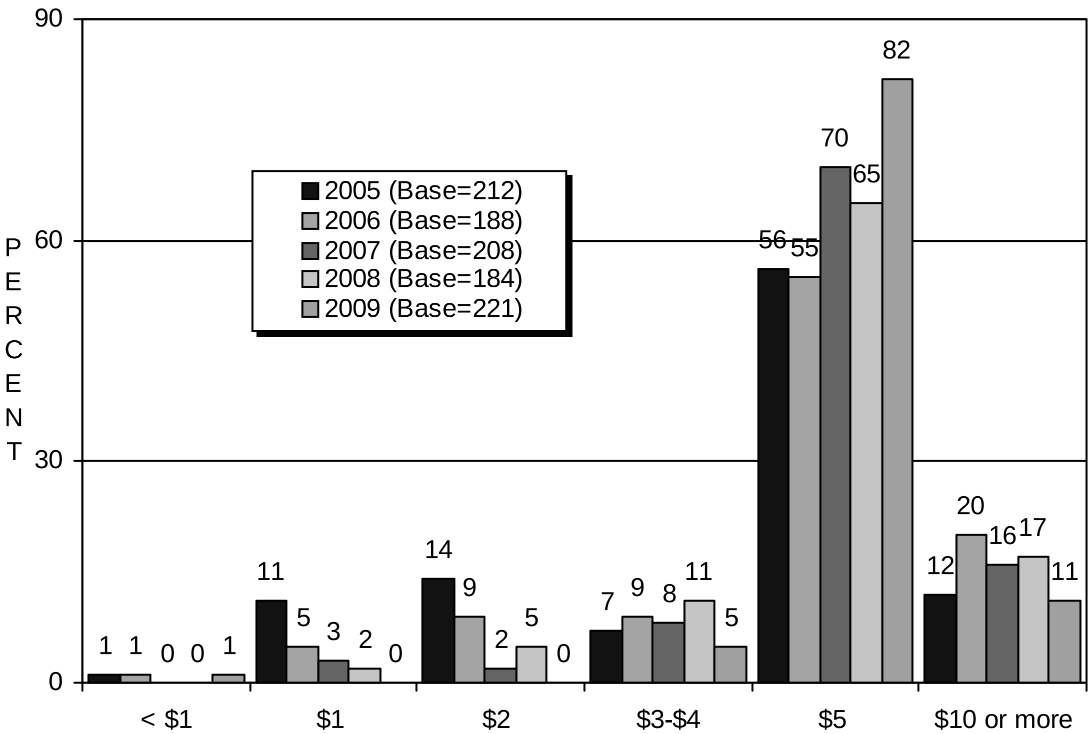
FIGURE 59
Average Coins/Tokens For Each Play*
(Among Those Who Played Slot And Video Machines)



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). Over the past several years there has been a dramatic increase in the number of coins/tokens played, likely due to the greatly increased popularity of penny machines. In 2009, the average number of coins or tokens per play was 25.5, similar to last year, but up significantly from 7.6 in 2005, 10.4 in 2006, and 16.8 in 2007. Forty percent (40%) reported playing five or more coins/tokens per play, about the same as last year, but up significantly from 22% in 2005, 27% in 2006, and 33% in 2007.

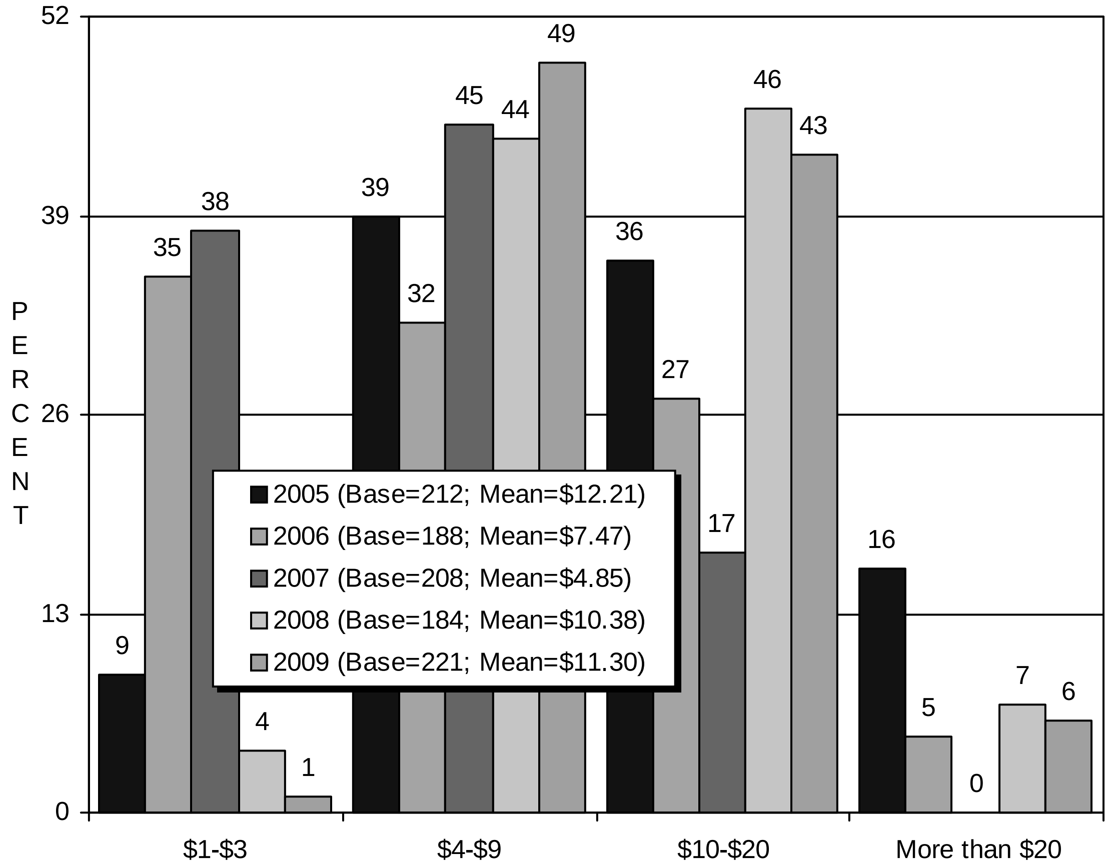
* Percentages may not add to 100% because of rounding.

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



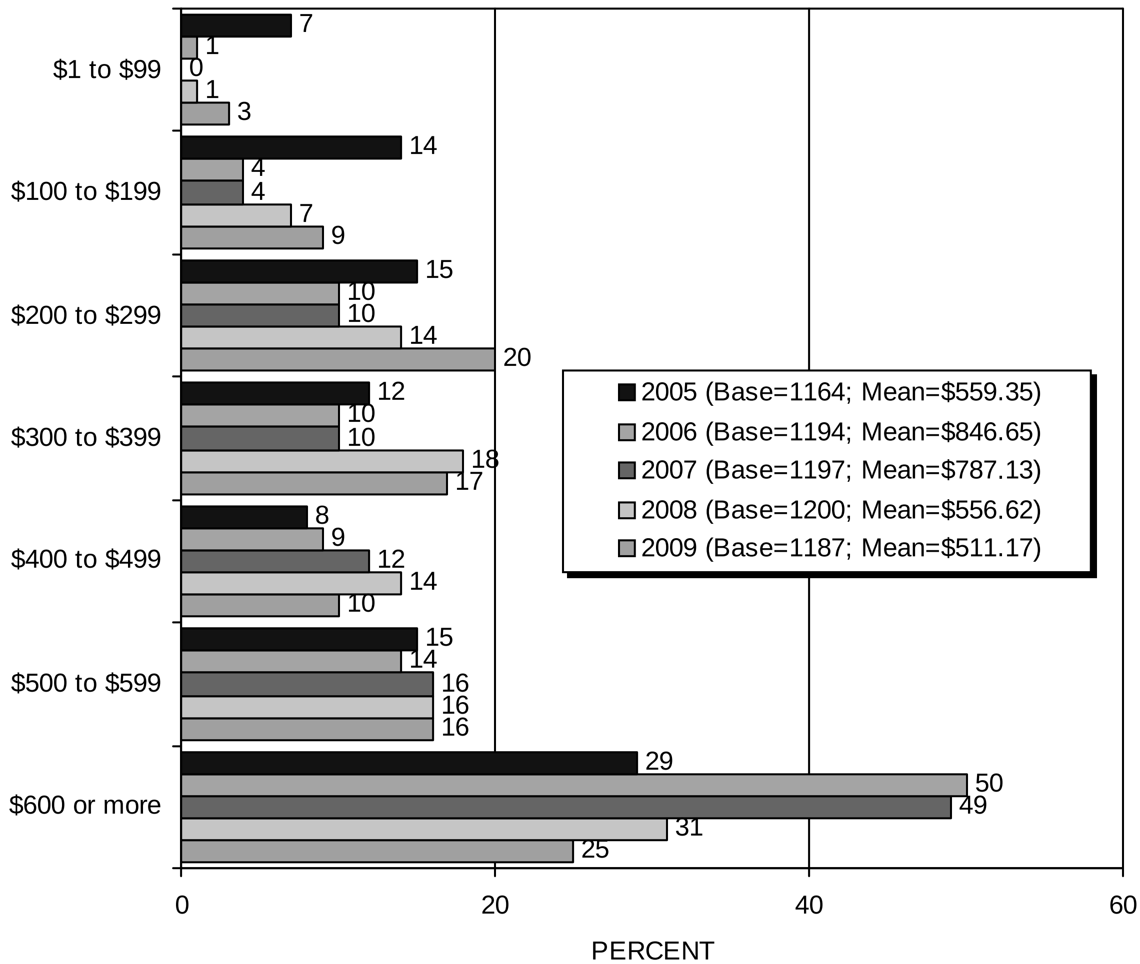
As Figure 60 shows, those who played table games most often in 2009 were most likely to say they played games with a $5.00 minimum (82%, up significantly from 2005 to 2008 readings). Eleven percent (11%) played games with a $10.00 or greater minimum, down significantly from 20% in 2006 and 17% in 2008. Five percent (5%) played minimums of $3.00-$4.00 (a significant decrease from 11% in 2008).

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



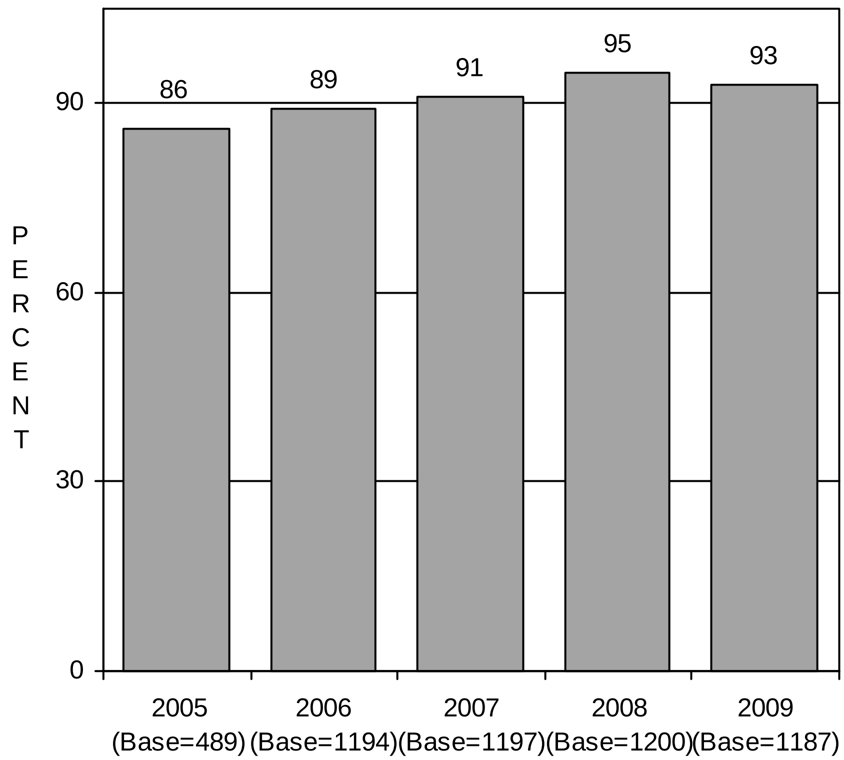
We asked those who played table games about the size of their usual bet (Figure 61). The reported average bet in 2009 was $11.30, up significantly from $7.47 in 2006 and $4.85 in 2007. Nearly one-half of table games players (49%) said their average bet was from $4 to $9, an increase from 39% in 2005 and 32% in 2006. Forty-three percent (43%) said their average bet was from $10 to $20, a significant increase from 27% in 2006 and 17% in 2007. Six percent (6%) said their average bet was more than $20, down from 16% in 2005. The proportion of table games players who said they bet $1 to $3 stands at 1%, down significantly from past years.

FIGURE 62
Trip Gambling Budget
(Among Those Who Gambled)



The average gambling budget reported by visitors to Laughlin was $511.17, down significantly from $559.35 in 2005, $846.65 in 2006, $787.13 in 2007, and $556.62 last year (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. In 2009, 93% of gamblers said they were (Figure 63), similar to last year, but up significantly from 86% in 2005, 89% in 2006, and 91% in 2007.

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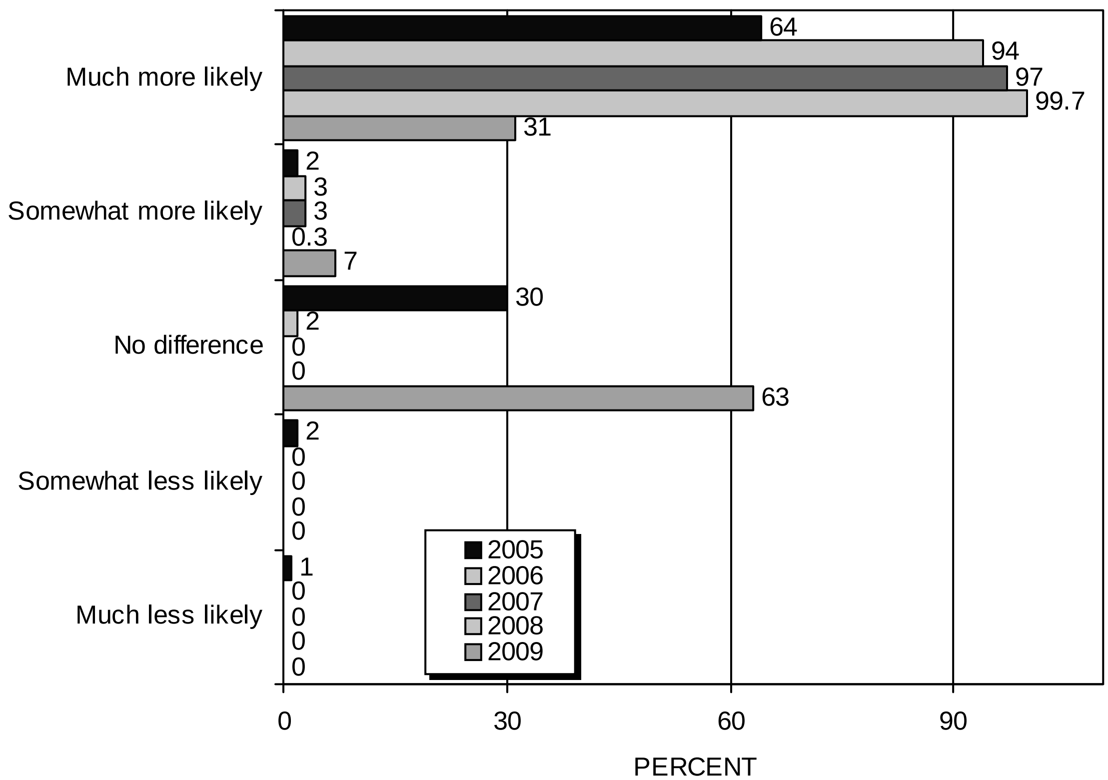
* Only "yes" responses are presented in this chart.

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



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

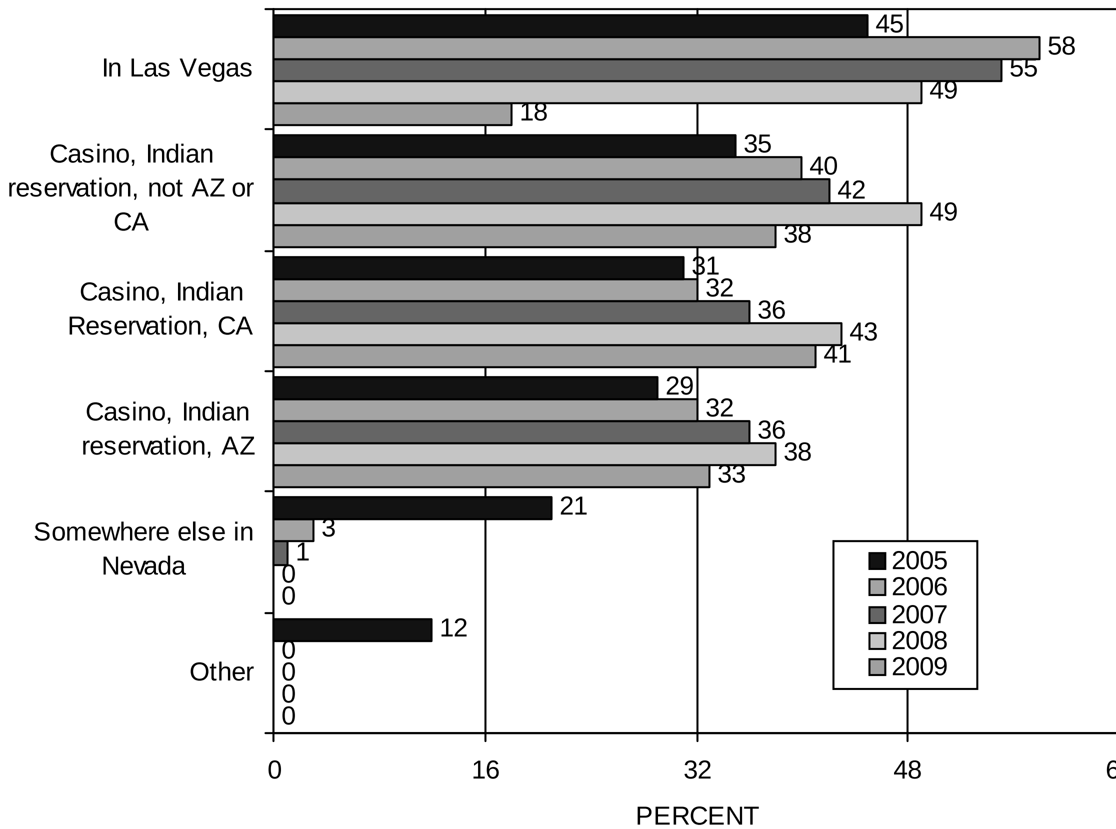
> "Now that there are more places to gamble outside of Laughlin, do you feel you are more likely or less likely to visit Laughlin, or does it not make a difference in your decision to visit Laughlin?"

In 2009, 63% said having more places to gamble would make no difference in their decision to visit Laughlin, up significantly from prior years. Three in ten (31%) said that having other places to gamble made them *much more* likely to visit Laughlin, down significantly from past years, while 7% said it would make them *somewhat more* likely to visit, up from past years (Figure 64).

---

* Beginning in 2009, this question was refined to address inconsistencies in interpreting and reporting of survey responses. GLS Research believes that the 2009 results most accurately reflect the Laughlin visitor.

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). Eighteen percent (18%) of Laughlin visitors in 2009 reported gambling recently in Las Vegas, down significantly from 45% in 2005, 58% in 2006, 55% in 2007, and 49% last year. Forty-one percent (41%) reported gambling at an Indian reservation in California, similar to last year, but up significantly from 2005 to 2007 figures. Thirty-eight percent (38%) gambled at an Indian reservation outside of Arizona or California, down from 49% last year. One-third (33%) said they gambled at an Indian reservation in Arizona (down from 38% in 2008, but up from 29% in 2005).

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

Ninety-two percent (92%) of Laughlin visitors said they were "very satisfied" with their visit to Laughlin in the 2009 survey (Figure 66), down significantly from past years. Seven percent (7%) said they were "somewhat satisfied" with their visit, up from prior years.

FIGURE 66
Satisfaction With Visit

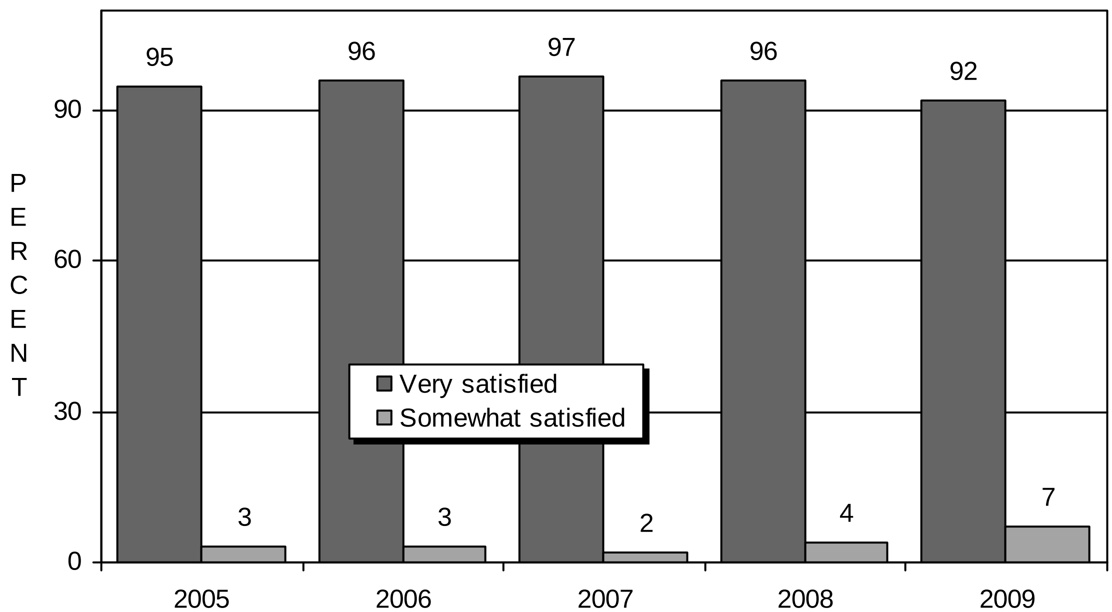
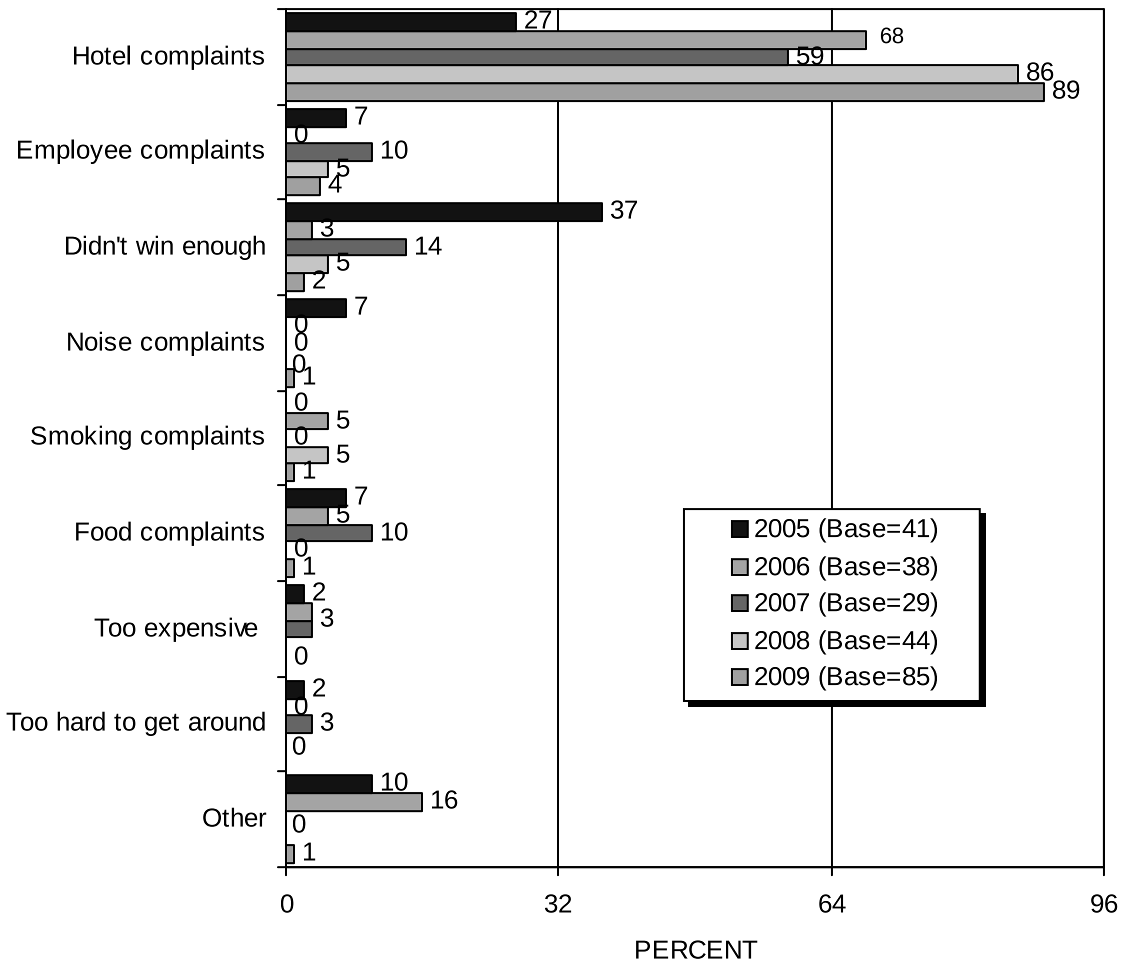
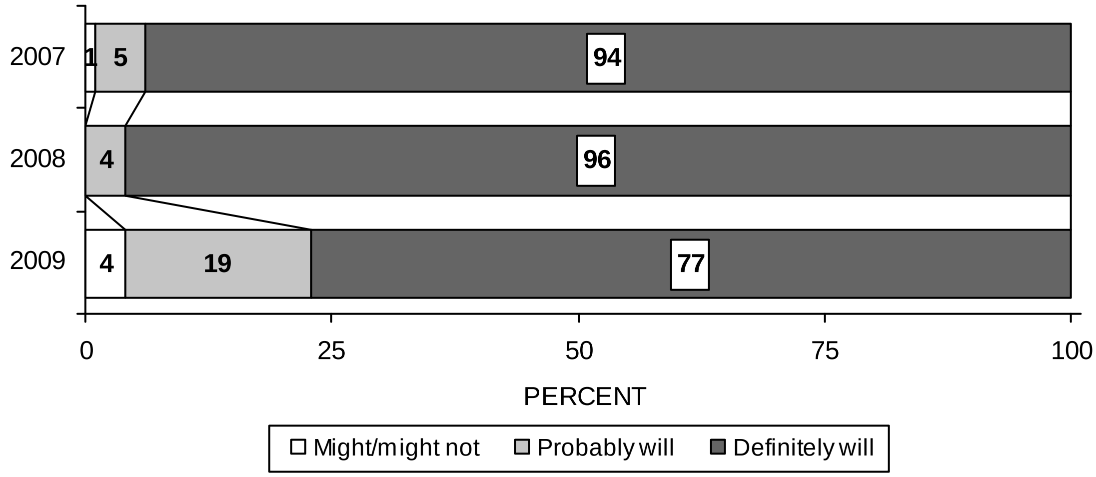


FIGURE 67
Why Not "Very" Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



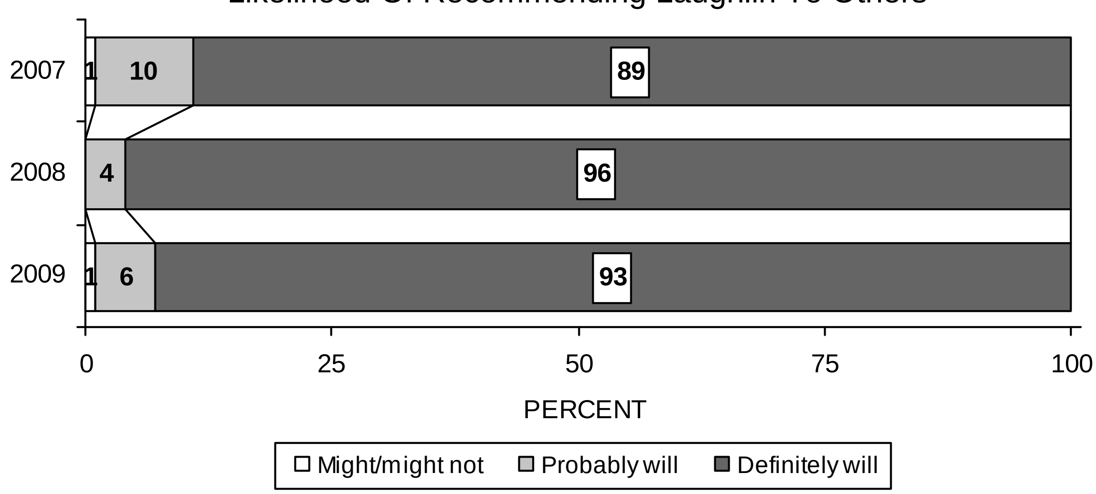
Those who were "somewhat" satisfied were asked why they were not "very" satisfied (Figure 67). Most (89%) mentioned complaints with their hotels, about the same as last year, but up significantly from 27% in 2005, 68% in 2006, and 59% in 2007. Four percent (4%) complained about employees, and 2% mentioned not winning enough money gambling, down from 37% in 2005.

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). More than three in four (77%) said they were “very likely” to return, down from 94% in 2007 and 96% last year. Nineteen percent (19%) said they “probably” will return to Laughlin in the next year, up from 5% in 2007 and 4% last year.

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 (93%) said they “definitely will” recommend Laughlin to others.

VISITOR DEMOGRAPHICS

As Figures 70 and 71 show, 2009 visitors were most likely to be married (76%) and white (83%, although down from 89% in 2005 and 88% each in 2006 and 2008). One in three visitors (33%) were from Southern California and 6% were foreign visitors. Forty-seven percent (47%) were 65 or older. Visitors are still more likely to be retired (54%, although down significantly from 59% in 2005) than employed (42%, up from 35% in 2005). The largest proportion of visitors have a high school diploma or less (44%, up from 39% in 2005). More than one-half (55%) have a household income of less than $60,000 (up significantly from 42% in 2005 and 49% in 2006).

FIGURE 70
VISITOR DEMOGRAPHICS

	YEAR 2005	YEAR 2006	YEAR 2007	YEAR 2008	YEAR 2009
GENDER					
Male	50%	50%	51%	51%	50%
Female	50	50	49	49	50
MARITAL STATUS					
Married	77	76	78	78	76
Single	9	8	7	9	12
Separated/divorced	6	6	6	5	5
Widowed	8	9	8	7	7
EMPLOYMENT					
Employed	35	45	43	45	42
Unemployed	1	0	0	1	1
Student	1	0	0	0	1
Retired	59	53	54	52	54
Homemaker	5	2	3	3	3
EDUCATION					
High school or less	39	44	44	45	44
Some college	32	30	35	33	32
College graduate	26	23	20	21	24
Trade/vocational school	4	3	1	1	0
AGE					
21 to 29	2	2	2	2	2
30 to 39	6	6	5	5	7
40 to 49	11	14	12	13	11
50 to 59	21	21	21	23	19
60 to 64	17	14	16	14	14
65 or older	44	44	44	44	47
MEAN	60.9	60.3	60.9	60.8	60.9
BASE	(1200)	(1200)	(1200)	(1200)	(1200)

FIGURE 71
VISITOR DEMOGRAPHICS
(Continued/2)

	YEAR 2005	YEAR 2006	YEAR 2007	YEAR 2008	YEAR 2009
ETHNICITY					
White	89%	88%	85%	88%	83%
African-American/Black	3	2	1	2	3
Asian/Asian American	1	1	2	1	2
Hispanic/Latino	6	8	10	9	11
Other	2	2	1	0	1
HOUSEHOLD INCOME					
Less than $20,000	5	2	2	2	3
$20,000 to $39,999	17	20	20	16	22
$40,000 to $59,999	20	27	34	33	30
$60,000 to $79,999	16	20	19	22	22
$80,000 or more	19	25	24	26	23
Not sure/no answer	23	7	2	2	1
VISITOR ORIGIN					
U.S.A.	96	94	94	96	94
Eastern states*	3	2	3	2	2
Southern states†	7	8	7	6	6
Midwestern states‡	12	14	13	18	15
Western states§	75	69	70	71	72
California	36	33	32	33	35
Southern California	34	31	30	30	33
Northern California	2	2	2	2	2
Arizona	24	21	23	24	21
Other West	15	14	15	15	16
No ZIP code given	0	0	0	0	0
Foreign	4	7	6	4	6
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............................50%

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

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

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

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

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

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

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

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

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

FIRST VISIT 19%	**SKIP TO A6 ON PAGE 3**
VISITED BEFORE.81	**ASK A2**
NOT SURE/DK 0	
REFUSED/NA..........0	

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

10.17 MEAN (ALL VISITORS)
12.30 MEAN (REPEAT VISITORS) (N=974)

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

2.28 MEAN (ALL VISITORS)
2.58 MEAN (REPEAT VISITORS) (N=974)

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

YES .... 31% (N=974)

NO 68

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=974)

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW 0%

TO ATTEND A CORPORATE MEETING 1

VACATION/PLEASURE 48

TO GAMBLE 20

VISIT FRIENDS/RELATIVES 19

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 2

OTHER BUSINESS PURPOSES........1

WATER-BASED RECREATION..........4

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.................... 32
TO GAMBLE 42
VISIT FRIENDS/RELATIVES............ 18
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT.................... 2
OTHER BUSINESS PURPOSES 1
WATER-BASED RECREATION 3
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 20%
NO 80
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 4
Or a chartered or escorted bus service or bus tour 1
Truck... 1
Automobile....................................... 77
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 5%
1-3 DAYS BEFORE........................... 8
4-6 DAYS BEFORE........................... 1
7-14 DAYS BEFORE....................... 31
15-30 DAYS BEFORE...................... 28
31-60 DAYS BEFORE...................... 18
61-90 DAYS BEFORE........................ 7
MORE THAN 90 DAYS BEFORE 3
NOT SURE/DK 0
REFUSED/NA.................................... 0

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

YES 1%	**SKIP TO B4**
NO 99	**ASK B3a**
NOT SURE/DK.....0 REFUSED/NA......0	**SKIP TO B4a**

B3a. What is the <u>MAIN</u> reason you did not use a travel agent to help you plan your trip? **(ACCEPT ONLY ONE RESPONSE.)** (N=1192)

CALLED 800# 71%
USED THE INTERNET 13
LAST MINUTE DECISION/NO TIME 4
PREFER TO MAKE MY OWN PLANS 1
ANOTHER PERSON MADE PLANS 2
GOT INVITE FROM HOTEL/CASINO 2
BUSINESS/COMPANY MADE PLANS....1
ALL OTHER MENTIONS 6

AFTER ASKING B3a, SKIP TO B4a

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

(ASK ONLY OF THOSE WHO SAID "YES" IN B3.)
B4. Did the travel agent... **(READ LIST)**
(N=8)

	YES	NO	DON'T KNOW	RE-FUSED
Influence your decision to visit Laughlin?	25%	75%	0%	0%
Influence your choice of accommodations?................	75	25	0	0
"Book" your accommodations?	100	0	0	0
"Book" your transportation?	88	12	0	0

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

YES 15%	**ASK B4b**
NO .... 85 NOT SURE/DK.......0 REFUSED/NA 0	**SKIP TO B5**

INTERVIEWER PLEASE NOTE: A RESPONDENT *MAY* <u>BOOK</u> ACCOMMODATIONS OR TRANSPORTATION THROUGH A TRAVEL AGENT *OR* THROUGH THE INTERNET — <u>BUT NOT BOTH</u>. HOWEVER, THEY CAN BE <u>INFLUENCED</u> 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=179)

	YES	NO	DON'T KNOW	RE-FUSED
"Book" your accommodations?	97%	3%	0%	0%
"Book" your transportation?	13	87	0	6

B4c. Did you find information on the Internet that... **(READ LIST)**
(N=179)

	YES	NO	DON'T KNOW	RE-FUSED
Influenced your decision to visit Laughlin?	22%	78%	0%	6%
Influenced your choice of accommodations?..............	59	41	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 (DO *NOT* READ THESE RESPONSE CODES)	DON'T KNOW (DO *NOT* READ THESE RESPONSE CODES)	RE-FUSED (DO *NOT* READ THESE RESPONSE CODES)
a. Where you would stay?	91%	3%	5%	1%	0%	0%
b. Where you would gamble?	85	2	12	1	0	0
c. Which shows you would see?	29	1	44	27	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?	92%	3%	5%	0%	(N=1192)
b. Where you would gamble?	86	1	13	0	(N=1187)
c. Which shows you would see?	39	1	60	0	(N=880)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

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

B7. Where are you traveling from? **(PROBE FOR LOCATION IMMEDIATELY PRIOR TO LAUGHLIN VISIT.)** (N=90)

LAS VEGAS 70%	**ASK B7a**
ARIZONA .... 20 CALIFORNIA .... 3 OTHER .... 7 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=63)

Air 81%

Automobile, truck, RV, bus 19

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	96%
MOTEL	0
RV PARK	2
FRIENDS/RELATIVES	1
DAYTRIP/OTHER	1

LOCATION OF LODGING

LAUGHLIN	96%
BULLHEAD CITY	0
DAYTRIP/LOCATION COULD NOT BE DETERMINED	4

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=1192)

HOTEL	97%
MOTEL	0
RV PARK	2
FRIENDS/RELATIVES	1
OTHER	0

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

IF RESPONSE TO C1 IS AN RV PARK (CODES 3000-3999), ASK C1a & C2, 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=1178)

a. Booked by phone, calling the hotel, motel, or RV park directly.. 77%
b. Booked through a travel agent (either in person or by phone)........1
c. Booked by phone but not by calling the hotel directly and not through a travel agent....................2
d. Booked at a website on the Internet....................................... 15
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=173)

AOL (AMERICA ONLINE).................. 2%
EXPEDIA.COM 12
TRAVEL.COM 1
ORBITZ 1
PRICELINE.COM 2
TRAVELOCITY 2
YAHOO 4
HOTEL WEB SITE (ANY)... 71
OTHER... 4
NOT SURE/DK.................................. 0
REFUSED/NA 2

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=1178)

SAME DAY 6%
1-3 DAYS BEFORE............ 8
4-6 DAYS BEFORE............ 2
7-14 DAYS BEFORE........ 31
15-30 DAYS BEFORE...... 28
31-60 DAYS BEFORE...... 18
61-90 DAYS BEFORE........ 6
MORE THAN 90 DAYS BEFORE 2
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=1153)

ONE 11%
TWO 80
THREE................................5
FOUR OR MORE 4
REFUSED/NA.....................0
2.02 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=1153)

HOTEL/AIRLINE PACKAGE DEAL..........13% HOTEL/AMENITIES PACKAGE DEAL...........0 TOUR/ TRAVEL GROUP 0	**ASK C6**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE ....45 REGULAR FULL-PRICE ROOM RATE......1	**SKIP TO C8**
CASINO COMPLIMENTARY......40	**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=150)

$0 - $49 ....1%
$50 - $99 14
$100 - $149 13
$150 OR MORE 71
NOT SURE/REFUSED ...0
$242.71 MEAN
$229.00 MEDIAN

C6a. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=150)

OUTDOOR BILLBOARD 0%
BROCHURE 0
E-MAIL OFFER.................................. 4
INTERNET AD (POP-UP OR BANNER AD) 1
OFFER RECEIVED IN THE MAIL.... 47
NEWSPAPER.................................. 22
RADIO 1
RESERVATION AGENT/ CALL CENTER 5
TELEVISION...................................... 1
TRAVEL AGENT 4
ANY WEB SITE 1
WORD-OF-MOUTH.......................... 13
OTHER 1
NOT SURE/DK 0
REFUSED/NA.................................... 1

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=544)

$0 - $24.............................. 18%
$25 - $49............................ 63
$50 OR MORE................... 18
NOT SURE/NO ANSWER... 1
$38.53 MEAN
$34.00 MEDIAN

C8a. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=544)

OUTDOOR BILLBOARD..................0%
BROCHURE.....................................0
E-MAIL OFFER 2
INTERNET AD (POP-UP OR BANNER AD)............................24
OFFER RECEIVED IN THE MAIL ..36
NEWSPAPER 1
RADIO 0
RESERVATION AGENT/ CALL CENTER................................12
TRAVEL AGENT 0
ANY WEB SITE................................3
WORD-OF-MOUTH 21
OTHER 0
NOT SURE/DK.................................0
REFUSED/NA 1

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....................................68
3......................................7
4....................................11
5 OR MORE 6
2.49 MEAN
2.00 MEDIAN

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

YES 7%
NO 93
NOT SURE/DK................ 0
REFUSED/NA 0

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

DAYTRIP 1%
1 6
2 32
3 32
4 18
5 OR MORE........................... 11
3.09 MEAN
3.00 MEDIAN

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

1 .... 1%
2 6
3 32
4 32
5 18
6 OR MORE........................... 11
4.09 MEAN
4.00 MEDIAN

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

SUNDAY................................ 15%
MONDAY 13
TUESDAY.............................. 14
WEDNESDAY......................... 13
THURSDAY 13
FRIDAY.................................. 16
SATURDAY 16
REFUSED/NA.......................... 0

D1. Have you gambled during this visit to Laughlin?

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

D2. On average, how many hours *PER DAY* did you spend gambling? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?") (N=1187)

1 TO 2 HOURS 11%
3 TO 4 HOURS 26
5 TO 6 HOURS 30
7 TO 8 HOURS 20
9 TO 10 HOURS 9
MORE THAN 10 HOURS........... 4
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=1187)

1... 39%
2... 33
3... 17
4... 4
5 TO 6.. 7
MORE THAN 6.......................... 0
2.11 MEAN
2.00 MEDIAN

D4. Which type of casino game do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=1187)

SLOT MACHINES ..... 55% VIDEO POKER.......... 20 OTHER VIDEO MACHINES (21, KENO, ETC.) 2	**ASK D5**
BACCARAT .... 0 BIG 6........................... 0	**SKIP TO D7**
BINGO 1	**SKIP TO D10**
BLACKJACK.............. 10 CARIBBEAN STUD POKER .... 0 CRAPS 2	**SKIP TO D7**
KENO.......................... 2	**SKIP TO D10**
POKER 5	**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=907)

PENNY 39%
NICKEL.............................12
DIME 0
QUARTER 39
HALF DOLLAR 0
DOLLAR 9
FIVE DOLLARS....................0
25 DOLLARS........................0
OTHER 0
NOT SURE/DK 0
REFUSED/NA.......................0

CONTINUE WITH D6

D6. On the average, how many coins/tokens do you usually insert before each play on a machine? **(INTERVIEWER: IF RESPONDENT SAYS "MAXIMUM," ASK:** "How many would that be on the average?") (N=907)

1-2	4%
3	21
4-5	35
6 OR MORE	40
REFUSED/NO ANSWER	0
25.52	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=221)

LESS THAN $1.00	1%
$1.00	0
$2.00	0
$3.00-$4.00	5
$5.00	82
$10.00	9
$25.00	1
$50.00	0
OVER $50.00	1
OTHER	0
NOT SURE/DK	1
REFUSED/NA	0

CONTINUE WITH D8

D8. What is your average bet? **(WRITE AMOUNT IN BLANKS BELOW.)** (N=221)

$1 - $3	1%
$4 - $9	49
$10 - $20	43
OVER $20	6
DON'T KNOW/NA	0
$11.30	MEAN
$6.00	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=1187)

$1 - $99	3%
$100 - $199	9
$200 - $299	20
$300 - $399	17
$400 - $499	10
$500 - $599	16
$600 OR MORE	25
NOT SURE/NO ANSWER	0
$511.17	MEAN
$400.00	MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=1187)

YES	93%
NO	7
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........ 41
B. At a casino on an Indian reservation in Arizona........... 33
C. At a casino on an Indian reservation outside Arizona or California............. 38
I. In Las Vegas, Nevada.......... 18
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................. 31%
SOMEWHAT MORE LIKELY.........7
NO DIFFERENCE........................63
SOMEWHAT LESS LIKELY...........0
MUCH LESS LIKELY.....................0
NOT SURE/DK...............................0
REFUSED/NA................................0

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...................... 21%	**ASK B13**
NO .... 79 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=256)

A. Downtown Las Vegas (that is, the area on or near Fremont Street)?......... 81%
B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?......................... 87

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.......................16%	**ASK B15**
NO .... 84 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=191)

Hoover Dam.............................. 34%
Lake Mead 30
Lake Havasu/ Colorado River 34
Lake Mojave/ Davis Dam 28
Grand Canyon 20
Bryce Canyon 3
Zion National Park 4
Oatman, Arizona........................ 32
Other... 3

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.)**

$204.98 MEAN (INCLUDING $0)
$205.15 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.)**

$41.23 MEAN (INCLUDING $0)
$147.06 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) .... $68.26 MEAN (INCLUDING $0)
$117.86 MEAN (EXCLUDING $0)

B. Shows/entertainment (not including gambling) .... $6.57 MEAN (INCLUDING $0)
$32.83 MEAN (EXCLUDING $0)

C. Sightseeing .... $5.68 MEAN (INCLUDING $0)
$44.07 MEAN (EXCLUDING $0)

D. Other .... $3.08 MEAN (INCLUDING $0)
$217.41 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.................... 92%	**SKIP TO G1 ON PAGE 13**
Somewhat satisfied 7	**ASK F2**
Somewhat dissatisfied .... 1 Very dissatisfied 0	**SKIP TO F3**
<u>DO NOT READ</u> NOT SURE/DK................... 0 REFUSED/NA 0	**SKIP TO G1 ON PAGE 13**

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

(N=85)

HOTEL COMPLAINTS.......................... 89%
EMPLOYEE COMPLAINTS 4
DIDN'T WIN ENOUGH MONEY 2
FOOD COMPLAINTS............................. 1
NOISE COMPLAINTS............................ 1
SMOKING COMPLAINTS....................... 1
SWIMMING POOL CLOSED 1

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=12)

HOTEL COMPLAINTS.......................... 67%
SMOKING COMPLAINTS..................... 17
TOO HARD TO GET AROUND............... 8
ENTERTAINMENT COMPLAINTS.......... 8

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................................77%
Probably will 19
Might/might not..............................4
Probably will not 0
Definitely will not............................0
NOT SURE/NO ANSWER 0

F5. How likely will you be to recommend Laughlin 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............93%
Probably will recommend 6
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 42%	**ASK G2**
Unemployed ....1 Student ....1 Retired ....54 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=501)

SALES/CLERICAL WORKERS .. 31%

SERVICE WORKERS................. 22

MANAGERS/OFFICIALS/
PROPRIETORS 17

PROFESSIONAL/TECHNICAL... 18

CRAFT WORKERS/FOREMEN.. 10

OTHER... 2

REFUSED/NO ANSWER.............. 0

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) 42

SOME COLLEGE (INCLUDES
JUNIOR/COMMUNITY
COLLEGE — NO
BACHELOR'S DEGREE).............32

GRADUATED COLLEGE.............20

GRADUATE SCHOOL
(MASTER'S OR PH.D.)..................3

TECHNICAL, VOCATIONAL,
OR TRADE SCHOOL 0

REFUSED/NA 0

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

Married......................................76%

Single 12

Separated or divorced 5

Widowed 7

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

G5. What country do you live in?

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

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

EAST 2%

SOUTH...6

MIDWEST 15

WEST 72

- CALIFORNIA 35
- ARIZONA 21
- OTHER WEST 16

FOREIGN VISITORS 6

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

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

WHITE	83%
BLACK OR AFRICAN AMERICAN	3
ASIAN OR ASIAN AMERICAN	2
HISPANIC/LATINO	11
NATIVE AMERICAN	1
MIXED RACE	0
OTHER	0
NOT SURE/DON'T KNOW	0
REFUSED/NO ANSWER	0

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

60.88 MEAN
63.00 MEDIAN

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

21 to 29	2%
30 to 39	7
40 to 49	11
50 to 59	19
60 to 64	14
65 and older	47
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	3%
B. $20,000 to $29,999	6
C. $30,000 to $39,999	16
D. $40,000 to $49,999	15
E. $50,000 to $59,999	15
F. $60,000 to $69,999	12
G. $70,000 to $79,999	10
H. $80,000 to $89,999	6
I. $90,000 to $99,999	4
J. $100,000 to $149,999	13
K. $150,000 or more	0
NOT SURE/DK	0
REFUSED/NA	1

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

Laughlin
Nevada

IT'S LIKE YOU OWN THE PLACE

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

VisitLaughlin.com

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