LAUGHLIN
VISITOR PROFILE STUDY
2011

LAS VEGAS CONVENTION
AND **VISITORS AUTHORITY**

glsresearch

Research that works.

116 New Montgomery St.
Suite 812
San Francisco, CA 94105
Telephone: (415) 974-6620
Facsimile: (415) 947-0260
www.glsresearch.com

San Francisco
Las Vegas

LAUGHLIN VISITOR PROFILE

Calendar Year 2011

Annual Report

January 1, 2011 to December 31, 2011

Prepared for:

Las Vegas Convention And Visitors Authority

By:

GLS Research

ACKNOWLEDGMENTS

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
SENIOR EXECUTIVE STAFF
DECEMBER 31, 2011

President/CEO — Rossi T. Ralenkotter

Senior Vice President of Operations — Terry Jicinsky
Senior Vice President of Marketing — Cathy Tull

MARKETING RESEARCH STAFF
Senior Director of Marketing — Kevin M. Bagger
Senior Research Manager — Scott Russell
Research Analyst — Gina Zozaya

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

TABLE OF CONTENTS

TABLE OF FIGURES

TABLE OF FIGURES
(continued/2)

Page

TABLE OF FIGURES
(continued/3)

EXECUTIVE SUMMARY

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

This report presents the findings from the 1,200 personal interviews conducted by GLS Research from January 1, 2011 to December 31, 2011. Approximately one hundred (100) in-person interviews were conducted per month in or near Laughlin hotel-casinos and hotels.

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

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

REASONS FOR VISITING

Fifteen percent (15%) of visitors were first-time visitors to Laughlin, significantly higher than 12% in 2008, but down from 19% in 2009. Among first-time visitors, 51% said their primary reason for visiting Laughlin was vacation or pleasure (down from 63% in 2007 and 62% last year), while 14% mentioned gambling. Among repeat visitors, 56% mentioned vacation or pleasure as their primary reason for their current visit (up from past years), while gambling was cited by 29% (down from 2007 – 2010 figures). The average number of Laughlin visits among all visitors in the past year was 2.5 (up from 2.3 each in 2007, 2008, and 2009), while among repeat visitors it was 2.8, up from 2.5 each in 2007 and 2008. The average number of visits among all visitors in the past five years was 10.0, while among repeat visitors it was 11.6.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2007	2008	2009	2010	2011
Proportion of visitors who were first-time visitors	14%	12%	19%	18%	15%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	63%	58%	54%	62%	51%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	12%	14%	13%	12%	14%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	44%	33%	27%	35%	56%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	41%	51%	49%	36%	29%
Average number of visits in past five years (all visitors)	10.2	10.4	10.2	10.1	10.0
Average number of visits in past five years (repeat visitors)	11.7	11.6	12.3	12.0	11.6
Average number of visits in past year (all visitors)	2.3	2.3	2.3	2.5	2.5
Average number of visits in past year (repeat visitors)	2.5	2.5	2.6	2.8	2.8

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (87%). More than nine in ten visitors (94%) arrived in Laughlin directly from their permanent residences, up from 2008 and 2010. As in the past, most visitors decided where to stay in Laughlin before arriving in Laughlin (97%, up from 95% each from 2007 - 2009). Most visitors (87%) who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (down from 94% each in 2007 and 2008, and 92% in 2010). Twenty percent (20%) of visitors who saw shows decided what shows to see *before* arriving in Laughlin (down from 2007 – 2009 but up from 7% last year). Fifteen percent (15%) of all Laughlin visitors said they used the Internet to plan their trip (up from 7% in 2007, 8% in 2008, and 12% last year). Seventeen percent (17%) of Laughlin visitors visited Las Vegas on their current trip to Laughlin, up from 13% in 2008 but down from 21% in 2009. Twelve percent (12%) toured other nearby places, down from 2009 but up from 2007 – 2008.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2007	2008	2009	2010	2011
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/truck/RV)	87%	87%	86%	85%	87%
Proportion of visitors who traveled to Laughlin by air	13%	14%	14%	15%	13%
Proportion of visitors who traveled to Laughlin from their permanent residence	93%	91%	93%	89%	94%
Proportion of visitors who decided where to stay in Laughlin before arrival	95%	95%	95%	97%	97%
Proportion of visitors who decided where to gamble in Laughlin before arrival	94%	94%	87%	92%	87%
Proportion of visitors who decided which shows to see in Laughlin before arrival	52%	75%	40%	7%	20%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	5%	3%	1%	1%	0.4%
Proportion of visitors who used the Internet in planning their trip to Laughlin	7%	8%	15%	12%	15%
Proportion of visitors who have visited Las Vegas in the past five years	75%	71%	71%	71%	69%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	17%	13%	21%	20%	17%
Proportion of visitors who toured nearby places	2%	8%	16%	11%	12%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.0, up from 1.9 last year but down from 2007-2009 readings. Five percent (5%) had people under the age of 21 in their immediate party, up from 3% in 2007 and 2% in 2008. Their stay averaged 3.2 nights and 4.2 days, up from 2007 and 2008. Ninety-eight percent (98%) of visitors who stayed overnight lodged in a hotel or motel (down from 2007), with an average of 2.0 room occupants. Non-package overnight visitors who stayed in a hotel or motel spent an average of $39.20 for their room, similar to past years. Thirteen percent (13%) of visitors who stayed in a hotel or motel paid a package/tour group rate. The average package cost was $232.92, not significantly different from past years. The average food and drink expenditures were $185.30 per trip, down significantly from $204.98 in 2009 and $205.34 in 2010. The average local transportation expenditures were $61.03 per trip, up from past years. The average total spent on shopping in 2011 was $65.81, up from $40.53 in 2007, $32.53 in 2008, and $57.72 last year. An average of $5.08 was spent on shows (up from $2.40 in 2007, $3.01 in 2008, and $3.75 last year, but down from $6.57 in 2009), and an average of $4.74 was spent on sightseeing, up from 2007 – 2008.

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2007	2008	2009	2010	2011
Average number of adults in immediate party	2.1	2.3	2.5	1.9	2.0
Proportion of visitors with persons under 21 in their immediate party	3%	2%	7%	4%	5%
Proportion of visitors who stayed overnight	100%	100%	99%	98%	99%
Days stayed (average)	4.0	4.0	4.1	4.1	4.2
Nights stayed (average)	3.0	3.0	3.1	3.1	3.2
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	99%	98%	97%	98%	98%
Number of room occupants (average)	2.0	2.0	2.0	2.0	2.0
Lodging expenditures (average per night — non-package)	$41.76	$39.95	$38.53	$38.35	$39.20
Proportion of visitors who bought a package or travel group trip	11%	15%	13%	14%	13%
Average cost of package per person (among package/tour group visitors)	$242.32	$220.97	$242.71	$221.58	$232.92
Average trip expenditures for food and drink	$183.26	$192.89	$204.98	$205.34	$185.30
Average trip expenditures for local transport	$0.86	$29.46	$41.23	$34.27	$61.03
Average trip expenditures for shopping	$40.53	$32.53	$68.26	$57.72	$65.81
Average trip expenditures for shows	$2.40	$3.01	$6.57	$3.75	$5.08
Average trip expenditures for sightseeing	$0.27	$0.01	$5.68	$3.47	$4.74

GAMING BEHAVIOR AND BUDGETS

Nearly all visitors (99%) in 2011 gambled while in Laughlin. Those who gambled budgeted an average of $537.97, up from $457.46 last year. Gamblers spent an average of 5.9 hours a day gambling, and gambled at an average of 2.6 casinos (up from prior years). Eighty percent (80%) of gamblers played slot machines or video machines most often, up significantly from 77% each in 2007 and 2009, and 78% last year. Among these visitors, 31% played quarter machines most often (down from 2007 – 2009), while 49% played penny machines (up significantly from 2007 – 2010). The average number of coins or tokens per play was 28.6, similar to last year but up significantly from 2007 - 2009. Seventeen percent (17%) played table games most often, down from 20% last year. Among those who played table games most often, 72% typically played a $5 minimum (down from 82% in 2009 and 84% last year), with an average bet of $11.02, up significantly from $4.85 in 2007 and $7.74 in 2010.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2007	2008	2009	2010	2011
Proportion who gambled while visiting Laughlin	99.8%	100%	99%	99%	99%
Average trip gambling budget (among those who gambled)	$787.13	$556.62	$511.17	$457.46	$537.97
Average hours per day spent gambling (among those who gambled)	5.9	5.8	5.8	6.0	5.9
Average number of different casinos gambled (among those who gambled)	1.5	1.6	2.1	2.4	2.6
Proportion who played slot/video machines most often (among those who gambled)	77%	81%	77%	78%	80%
Proportion who played quarter machines most often (among those who played machines)	45%	38%	39%	35%	31%
Proportion who played penny machines most often (among those who played machines)	29%	37%	39%	44%	49%
Average number of coins/tokens per play (among those who played machines)	16.8	23.9	25.5	29.6	28.6
Proportion who played table games most often (among those who gambled)	17%	15%	19%	20%	17%
Proportion who played $5 table minimums most often (among those who played table games)	70%	65%	82%	84%	72%
Average bet (among those who played table games)	$4.85	$10.38	$11.30	$7.74	$11.02

ATTITUDINAL INFORMATION

Ninety-six percent (96%) of visitors reported that they were “very satisfied” with their trip to Laughlin, up from 92% in 2009 and 93% last year.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2007	2008	2009	2010	2011
Proportion who were “very satisfied” with their current trip to Laughlin	97%	96%	92%	93%	96%

VISITOR DEMOGRAPHICS

Nearly eight in ten (79%) Laughlin visitors were married, up from 75% last year. Thirty-one percent (31%) of visitors were from Southern California and 7% were foreign visitors, up from 4% in 2008. Forty-nine percent (49%) were 65 or older, up from 44% each in 2007 and 2008. Visitors are more likely to be retired (57%, up from 52% in 2008) than employed (38%, down from 45% in 2008). Forty-five percent (45%) of visitors have a high school diploma or less. Fifty-two percent (52%) have a household income of less than $60,000 (down from 58% last year).

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2007	2008	2009	2010	2011
Proportion of visitors who were married	78%	78%	76%	75%	79%
Proportion of visitors who were from Southern California	30%	30%	33%	32%	31%
Proportion of visitors who were foreign	6%	4%	6%	6%	7%
Proportion of visitors who were 50 years old or older	81%	81%	80%	80%	83%
Proportion of visitors 65 years old or older	44%	44%	47%	47%	49%
Average age	60.9	60.8	60.9	60.6	61.8
Proportion of visitors who were retired	54%	52%	54%	53%	57%
Proportion of visitors who were employed	43%	45%	42%	41%	38%
Proportion of visitors with a high school diploma or less	44%	45%	44%	43%	45%
Proportion of visitors with a household income less than $60,000	56%	51%	55%	58%	52%

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, 2011 and December 31, 2011 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2007	2008	2009	2010	2011
Days stayed (average)	4.0	4.0	4.1	4.1	4.2
Nights stayed (average)	3.0	3.0	3.1	3.1	3.2
Proportion of visitors who stayed overnight	100%	100%	99%	98%	99%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	99%	98%	97%	98%	98%
Lodging expenditures (average per night — non-package)	$41.76	$39.95	$38.53	$38.35	$39.20
Proportion of visitors who bought a package or travel group trip	11%	15%	13%	14%	13%
Average cost of package per person (among package/tour group visitors)	$242.32	$220.97	$242.71	$221.58	$232.92
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	$183.26	$192.89	$204.98	$205.34	$185.30
Average trip expenditures for local transportation	$0.86	$29.46	$41.23	$34.27	$61.03
Average trip expenditures for shopping	$40.53	$32.53	$68.26	$57.72	$65.81
Average trip expenditures for shows	$2.40	$3.01	$6.57	$3.75	$5.08
Average trip expenditures for sightseeing	$0.27	$0.01	$5.68	$3.47	$4.74
Proportion who gambled while visiting Laughlin	99.8%	100%	99%	99%	99%
Average trip gambling budget (among those who gambled)	$787.13	$556.62	$511.17	$457.46	$537.97

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 2011. 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 2011 study and compares them to the results of the 2007, 2008, 2009, and 2010 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, 85% of visitors said they had visited Laughlin more than once, and 15% were first-time visitors (Figure 1). There were significantly fewer repeat visitors than in 2008 (88%) but more than in 2009 (81%).

FIGURE 1
First Visit Vs. Repeat Visit

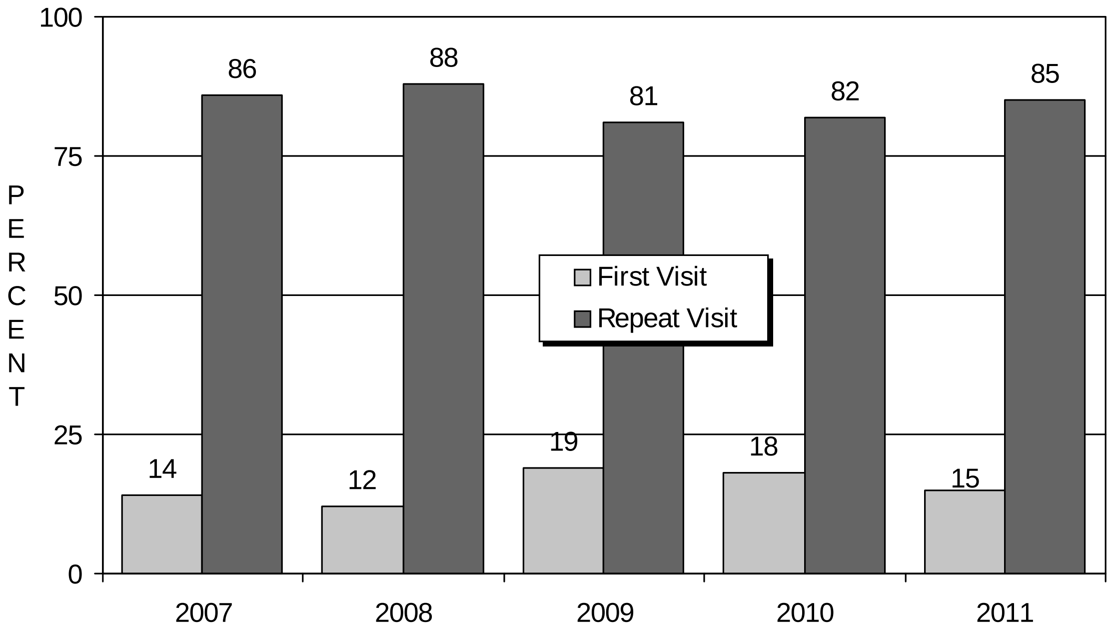
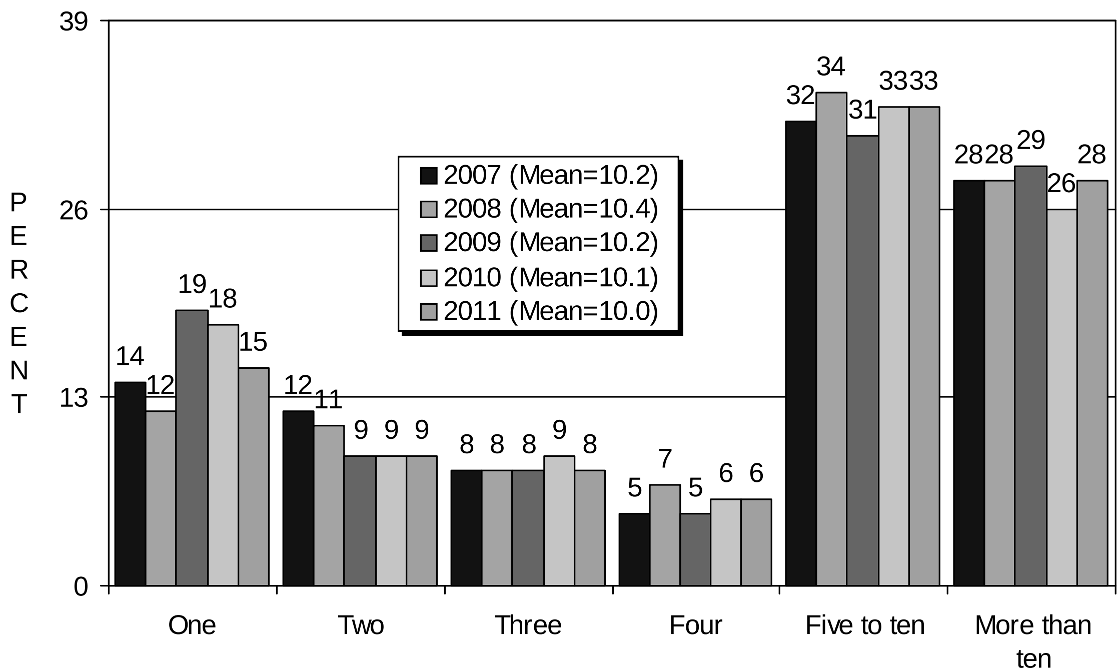
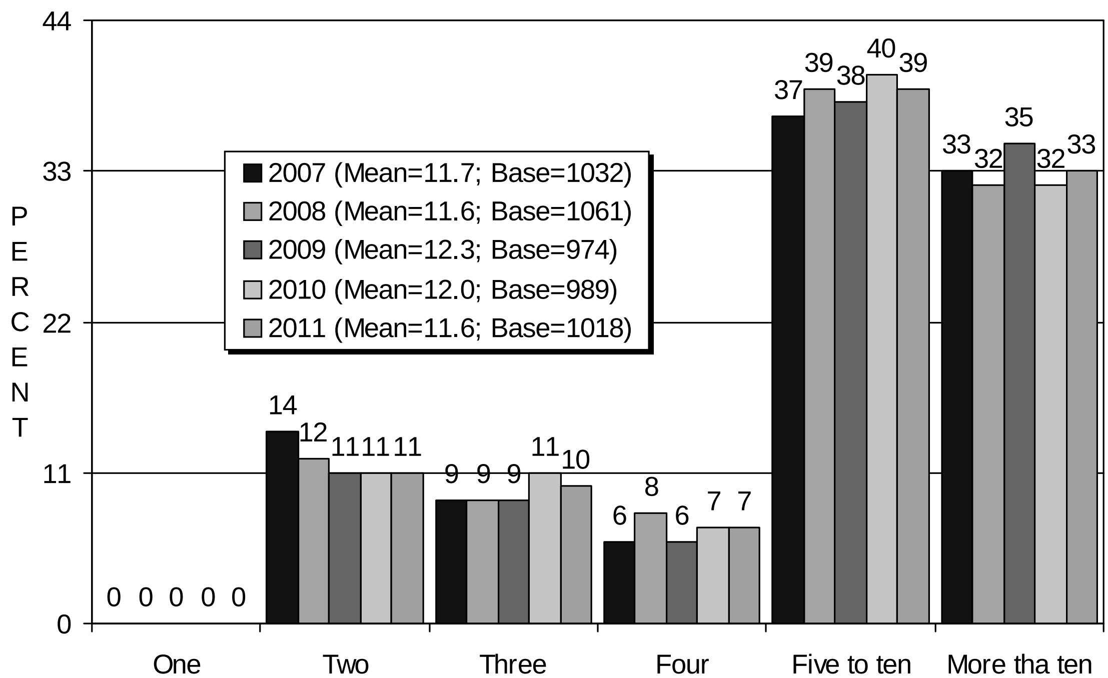


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



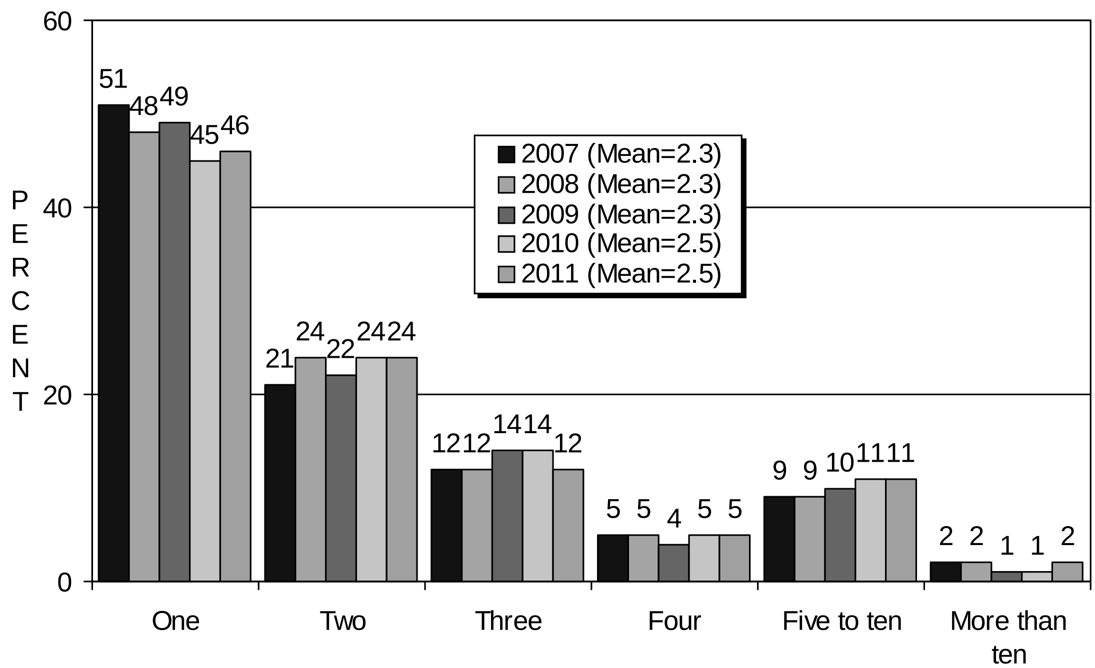
The average number of visits to Laughlin in the past five years *among all visitors* was 10.0 in this year's survey, not significantly different from the past four years (Figure 2). The proportion of visitors saying they visited only once in the past five years stands at 15%, significantly higher than in 2008 (12%) but down from 19% in 2009.

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



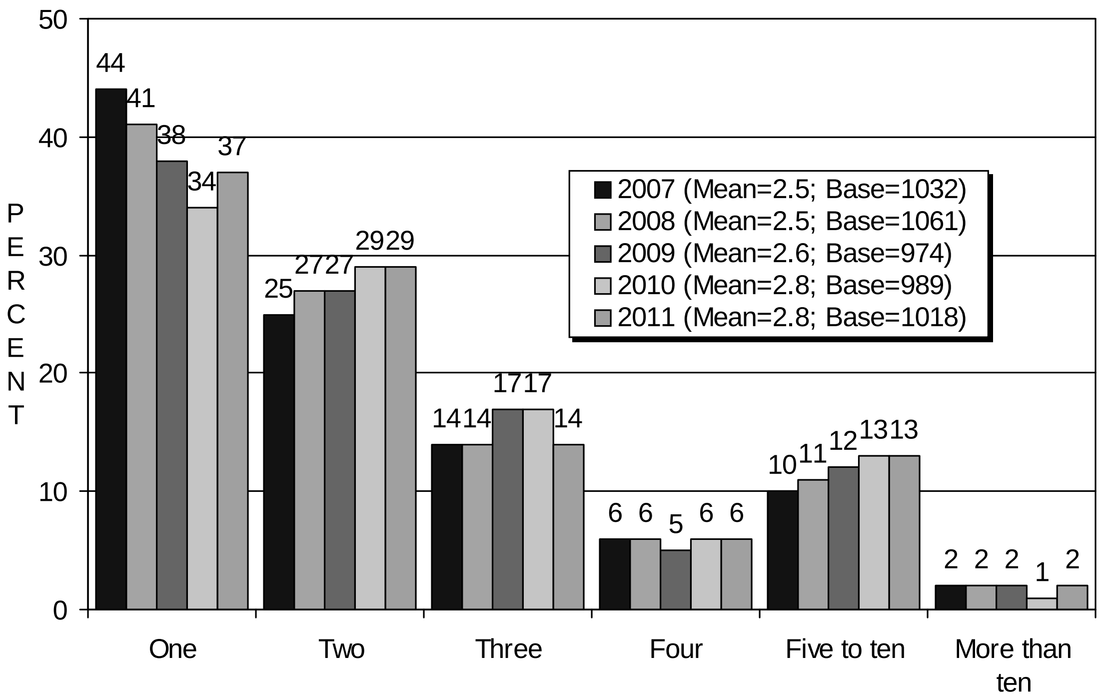
The average number of visits to Laughlin during the past five years *among repeat visitors* was 11.6, not significantly different from past years (Figure 3).

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



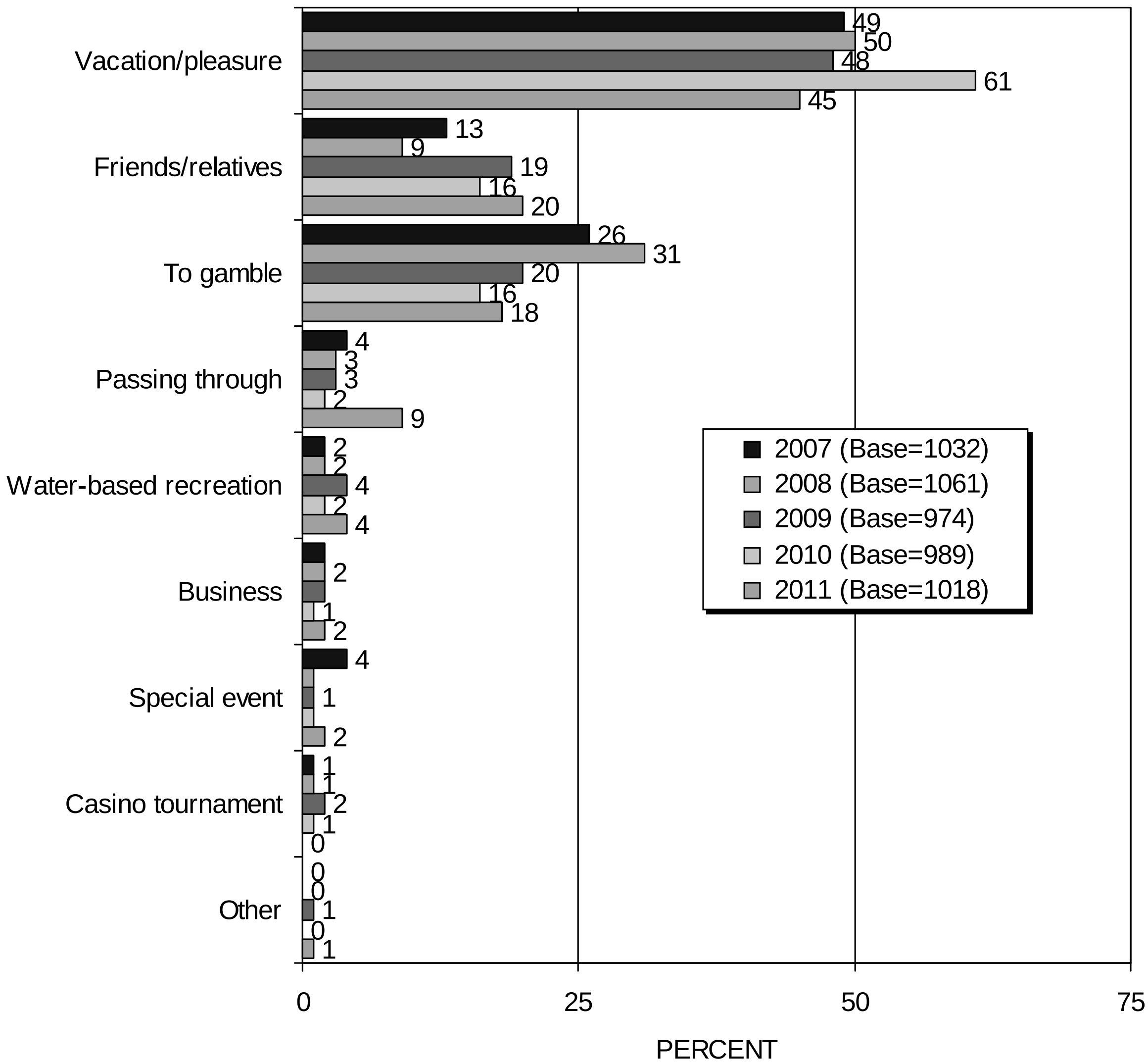
Among *all visitors*, the average number of visits in the past year was 2.5, up significantly from 2.3 each from 2007 - 2009 (Figure 4). Forty-six percent (46%) reported visiting Laughlin only once in the past year, down significantly from 51% in 2007.

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



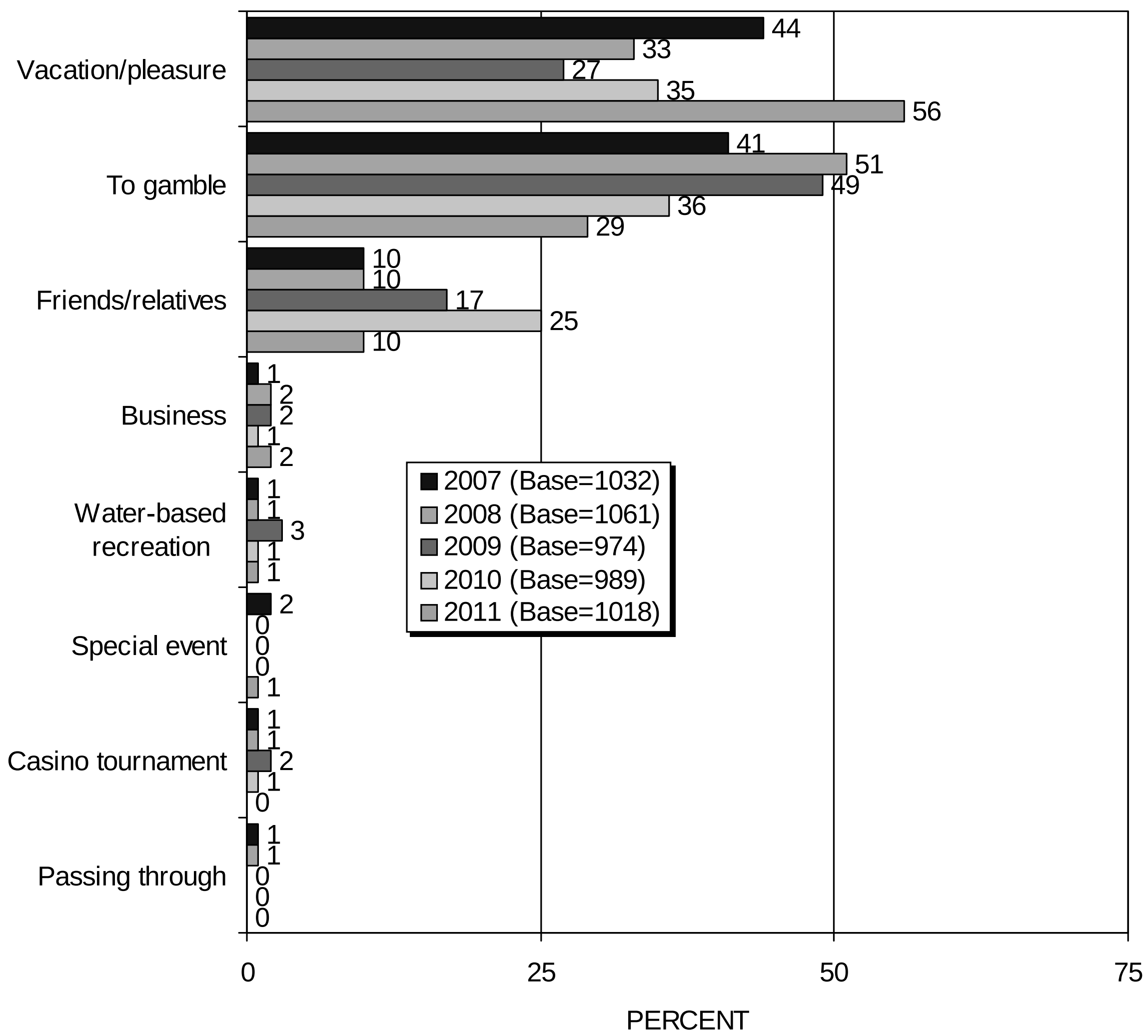
During the past year, repeat visitors averaged 2.8 trips to Laughlin, up significantly from 2.5 each in 2007 and 2008 (Figure 5). Among repeat visitors, 37% reported visiting just once in the past year, down significantly from 44% in 2007 and 41% in 2008. Twenty-nine percent (29%) reported visiting twice, up significantly from 25% in 2007.

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



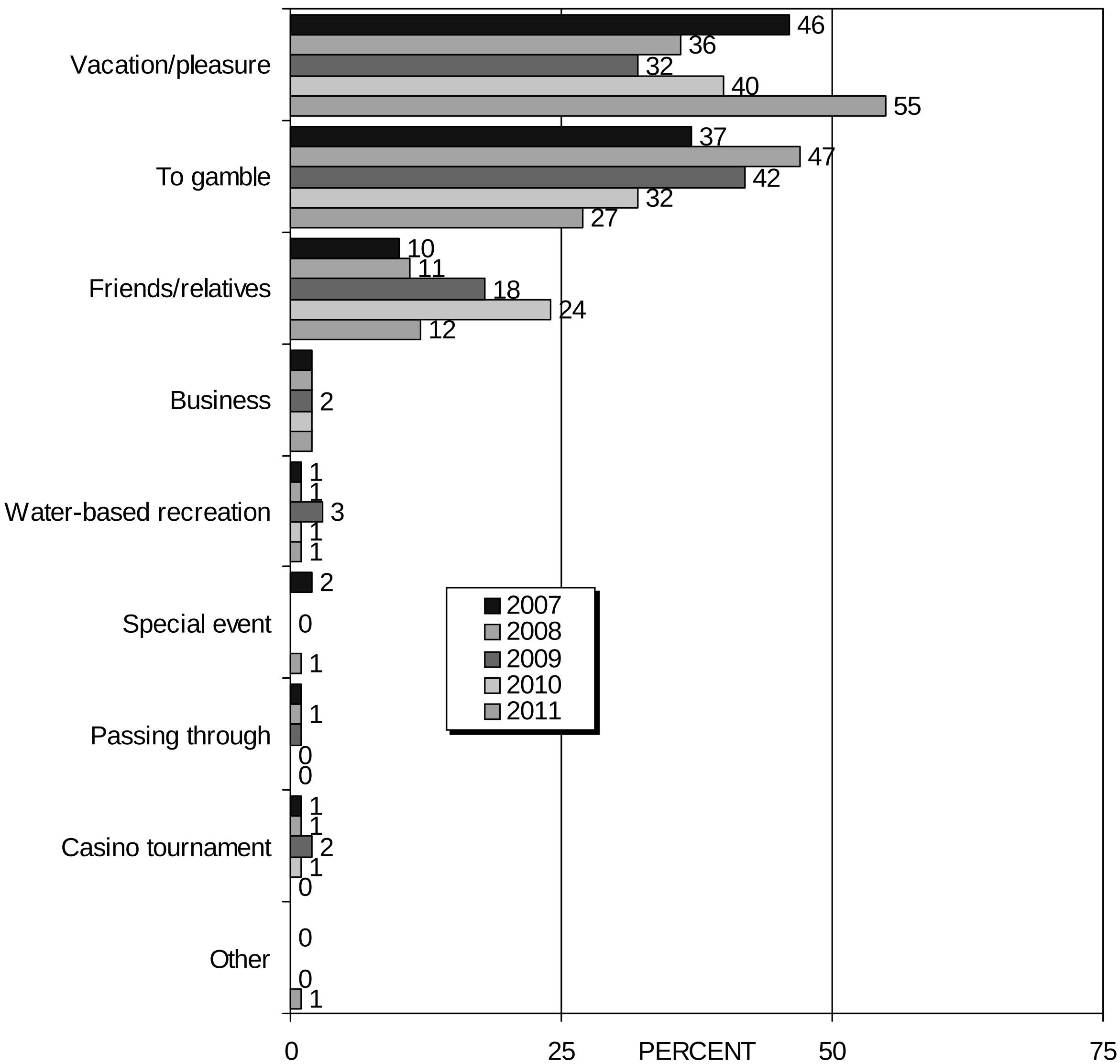
Forty-five percent (45%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure – a significant decrease from 49% in 2007, 50% in 2008, and 61% in 2010 (Figure 6). Eighteen percent (18%) of repeat visitors said they first came to Laughlin for gambling – down significantly from 26% in 2007 and 31% in 2008. One in five (20%) said they first came to Laughlin to visit family or friends, up from 13% in 2007, 9% in 2008, and 16% last year. Four percent (4%) said they first came to Laughlin for water-based recreation (up from 2% each in 2007, 2008, and 2010).

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



Among repeat visitors, more than one-half (56%, up from 2007-2010 results) said that the primary purpose for their *current* visit to Laughlin was vacation or pleasure (Figure 7). The proportion who said they came to gamble was 29%, down significantly from 41% in 2007, 51% in 2008, 49% in 2009, and 36% last year. One in ten (10%) said they came to visit friends or family, down significantly from 17% in 2009 and 25% last year.

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



Among *all visitors* in 2011, over one-half (55%) reported that the primary purpose for their current visit to Laughlin was vacation or pleasure, up significantly from past years (Figure 8). Twenty-seven percent (27%) of all visitors said gambling was the primary reason for their current visit, down significantly from 2007 - 2010. Twelve percent (12%) said they came to visit friends or relatives, down significantly from 18% in 2009 and 24% in 2010.

FIGURE 9
Primary Purpose Of First Visit Vs. Current Visit — 2011
(Among Repeat Visitors)

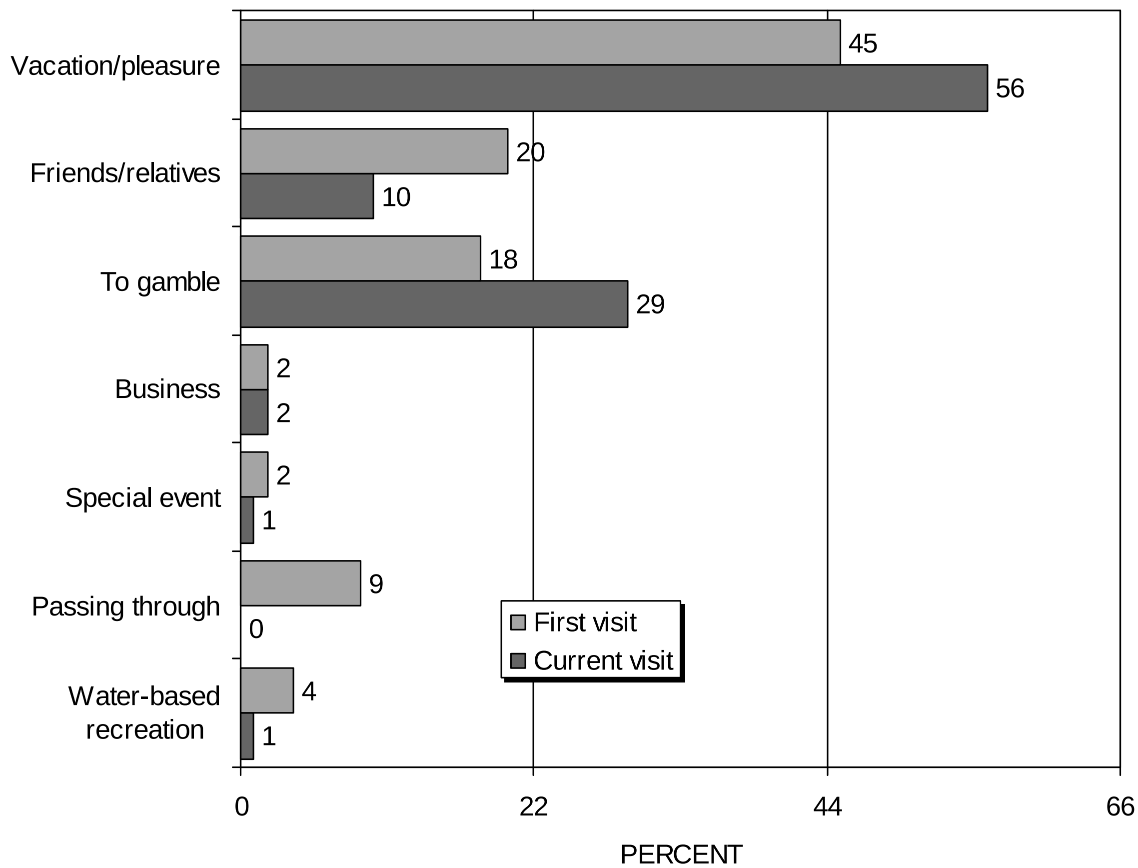


Figure 9 compares the reasons given by *repeat visitors* for their first Laughlin visit versus their current visit in 2011. Forty-five percent (45%) of repeat visitors said the primary purpose of their first trip to Laughlin was for vacation or a pleasure trip, while 56% said vacation/pleasure was the main reason for their current visit. Eighteen percent (18%) of repeat visitors said they first visited Laughlin primarily to gamble but about one in three (29%) said gambling was the primary purpose of their current visit. One in five (20%) repeat visitors said they first visited Laughlin primarily to visit friends or relatives, compared to 10% who said visiting friends or relatives was the primary purpose of their current visit.

FIGURE 10
Primary Purpose Of Current Visit — 2011
(First-Time Vs. Repeat Visitors)

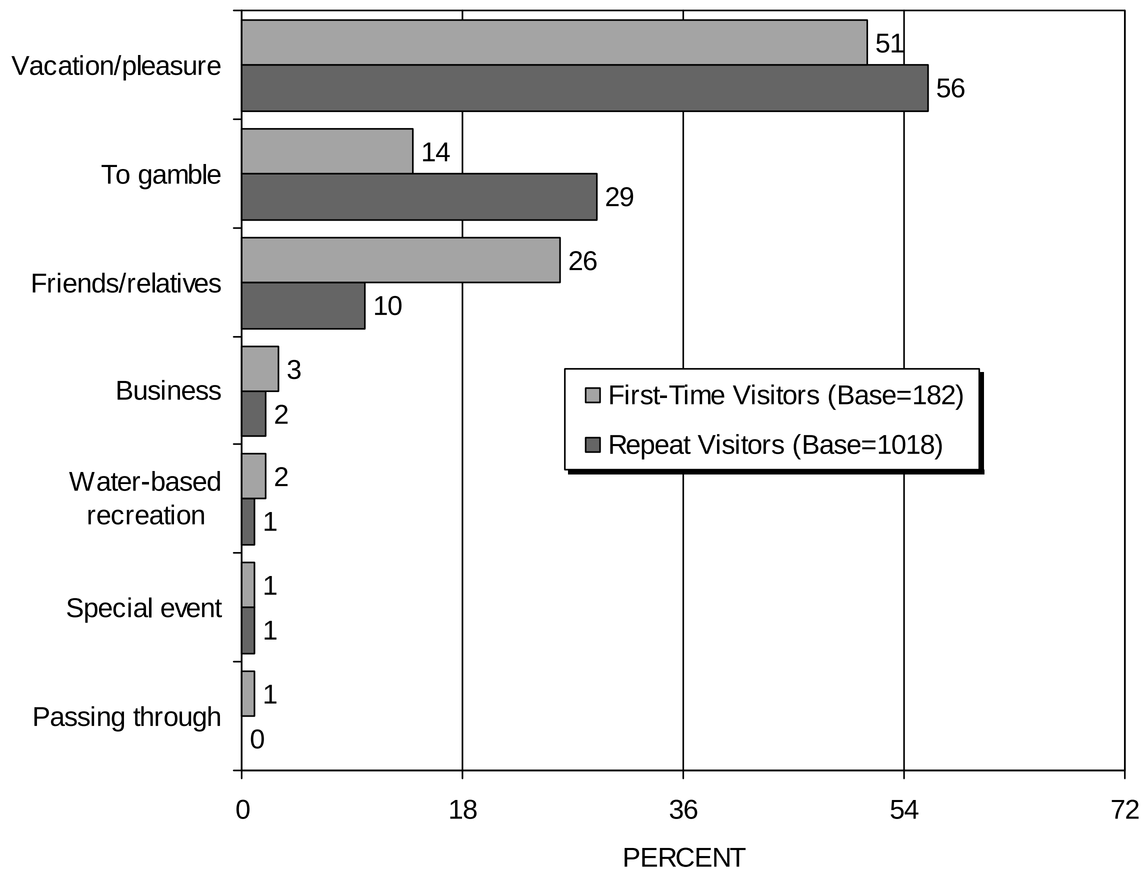
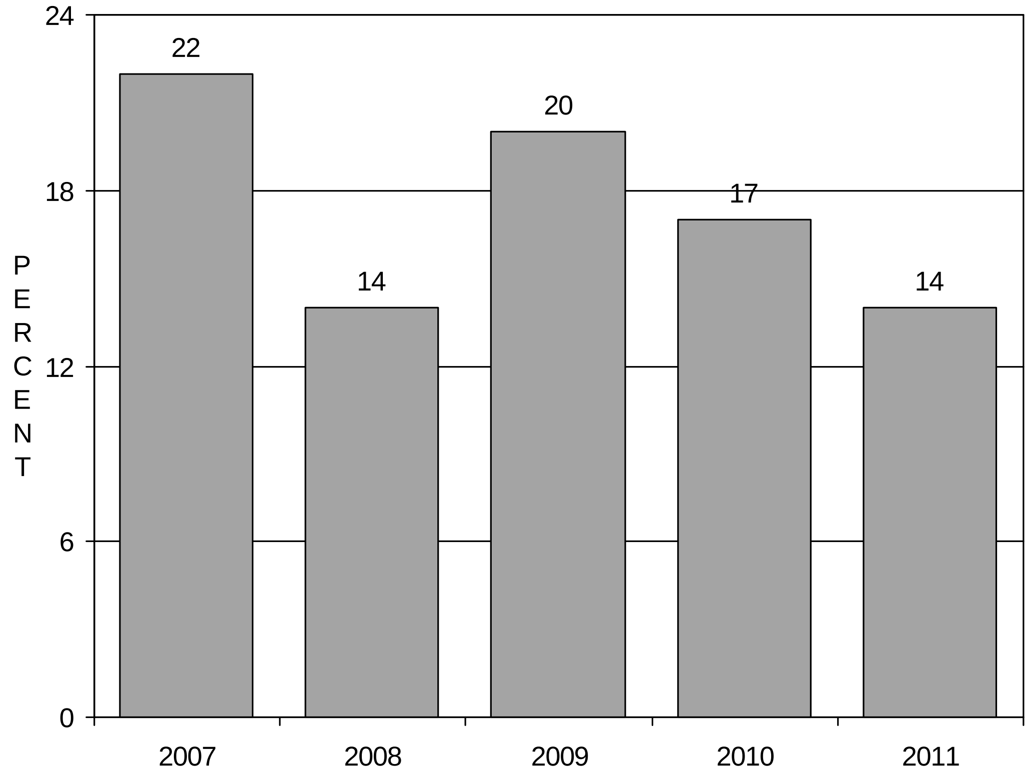


Figure 10 compares *first-time visitors* with *repeat visitors* in terms of purpose of their *current* visit to Laughlin in 2011. First-time visitors were significantly more likely than repeat visitors to say their current visit to Laughlin was to visit friends or relatives (26% vs. 10%). By contrast, repeat visitors were significantly more likely than first-time visitors to say they were visiting Laughlin primarily to gamble (29% vs. 14%).

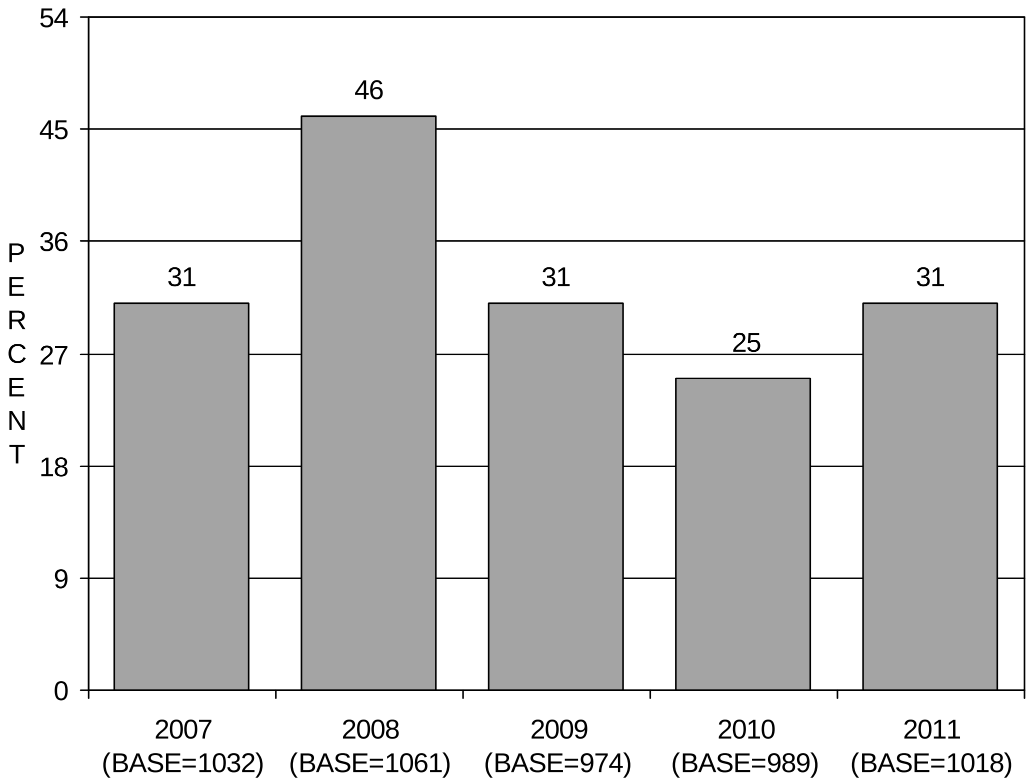
FIGURE 11
Gaming Tournaments*



We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). Fourteen percent (14%) said they planned to participate in a gaming tournament, down from 22% in 2007, 20% in 2009, and 17% last year.

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

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



We asked repeat visitors whether they had visited Laughlin in the past to attend a special event such as Desert Challenge, a rodeo, a car or motorcycle rally, or an outdoor concert (Figure 12). Thirty-one percent (31%) said they had, significantly lower than in 2008 (46%) but up from 25% last year.

* 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). Just under one-half (49%) of visitors planned their Laughlin trip seven to 30 days in advance, down significantly from 61% each in 2007 and 2008, 59% in 2009, and 54% last year. One in six (17%) said they planned their trip 31 to 60 days in advance, up from 14% in 2007. Fourteen percent (14%) said they planned their trip 61-90 days in advance, up from 2007 – 2010 results. Five percent (5%) planned their trip more than 90 days in advance, up from 3% in 2009 and 1% last year. Three percent (3%) said they planned their trip on the same day they traveled to Laughlin, down from 5% in 2009 and 6% last year.

FIGURE 13
Advance Travel Planning

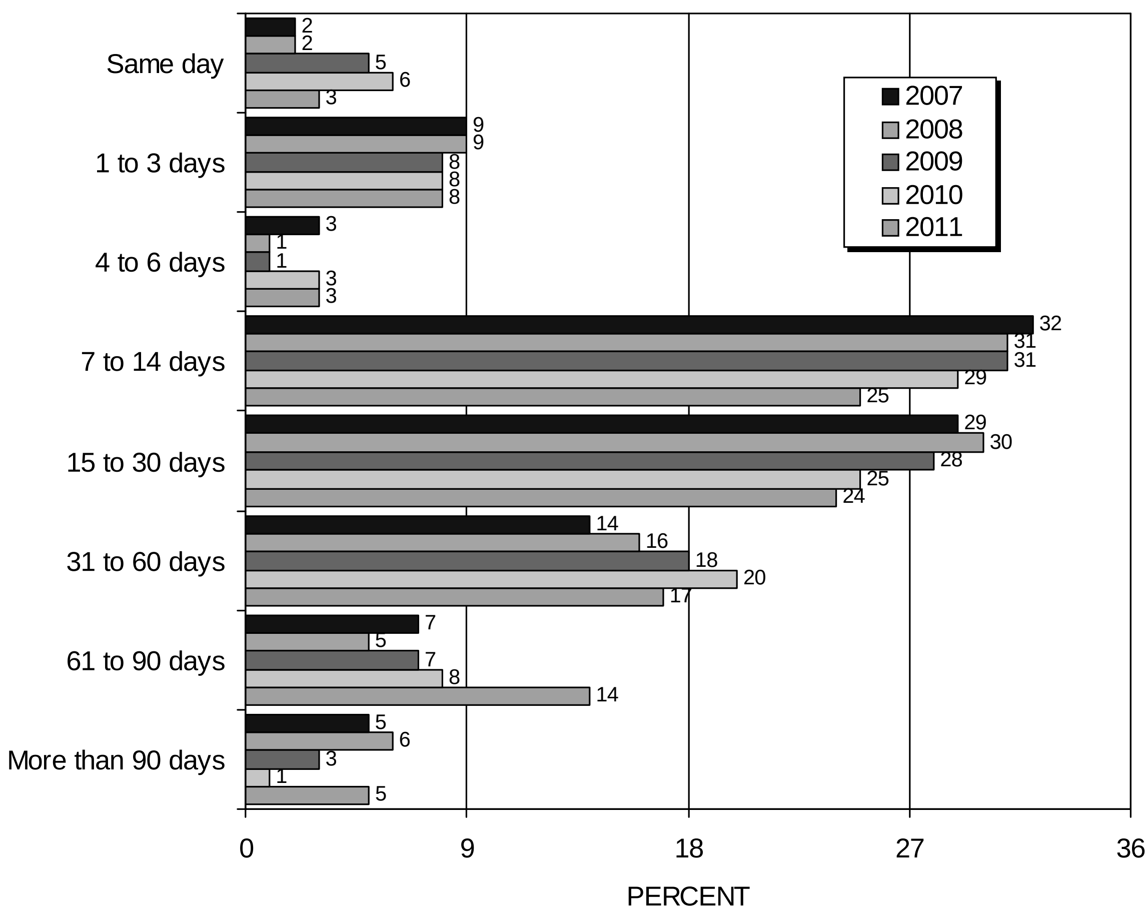
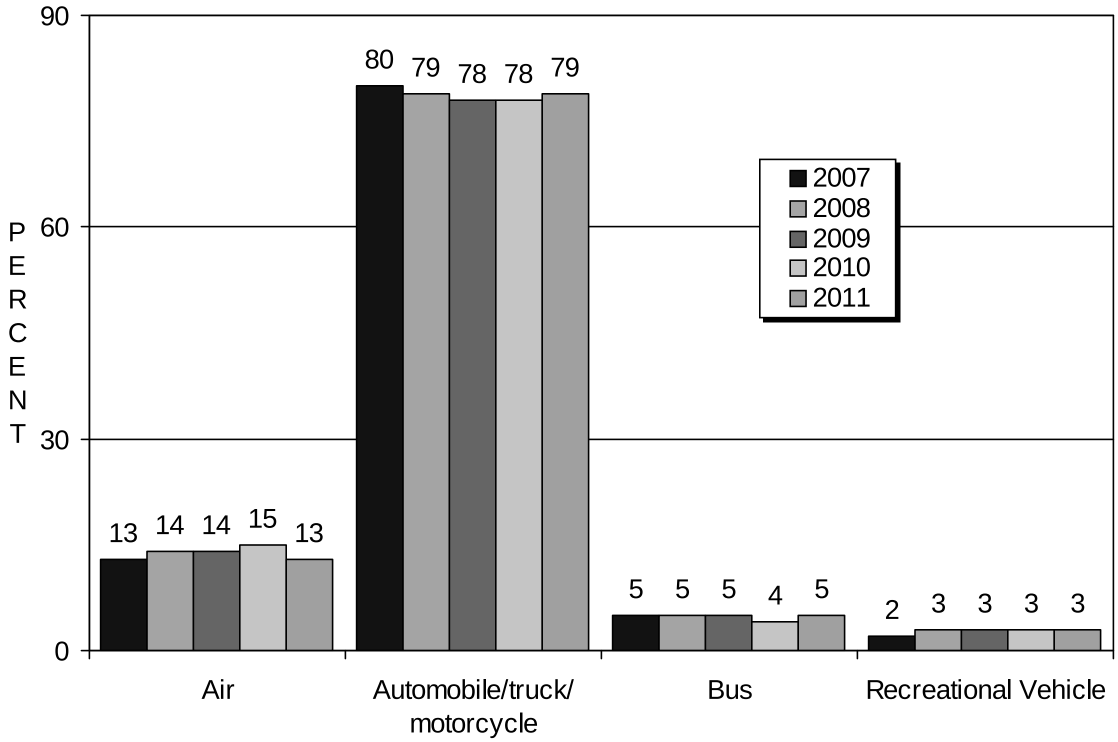
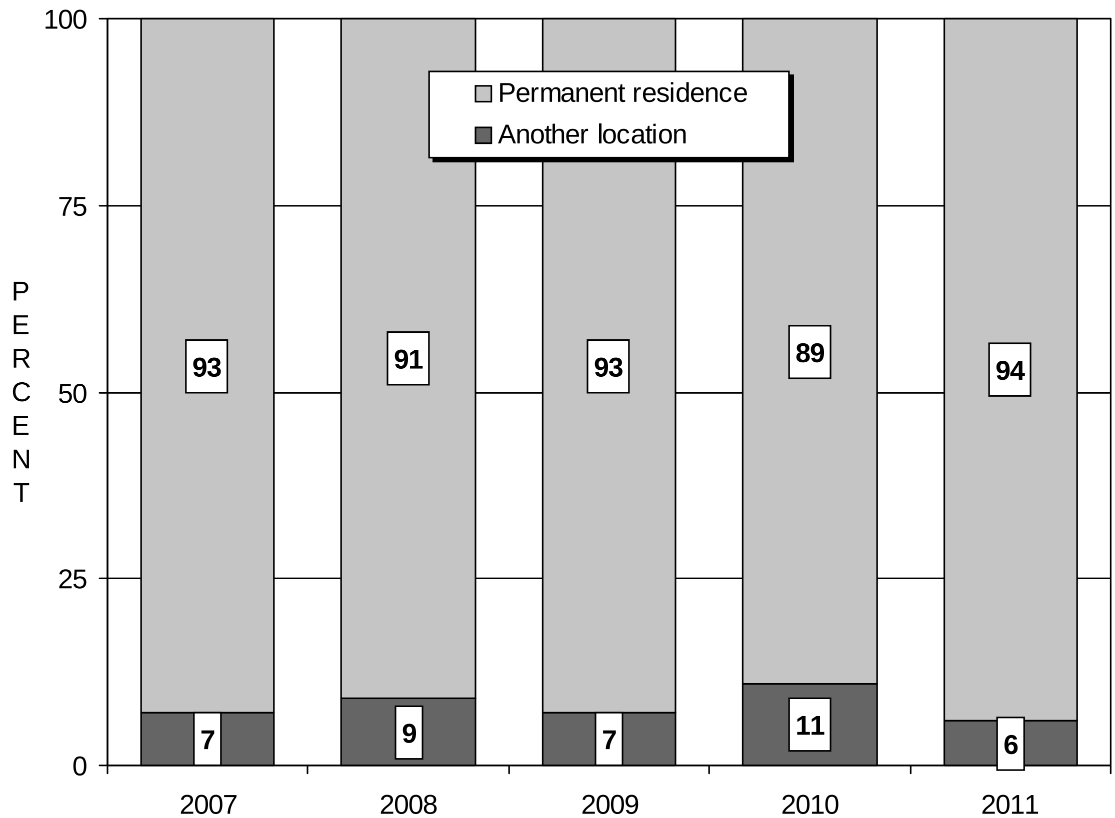


FIGURE 14
Transportation To Laughlin



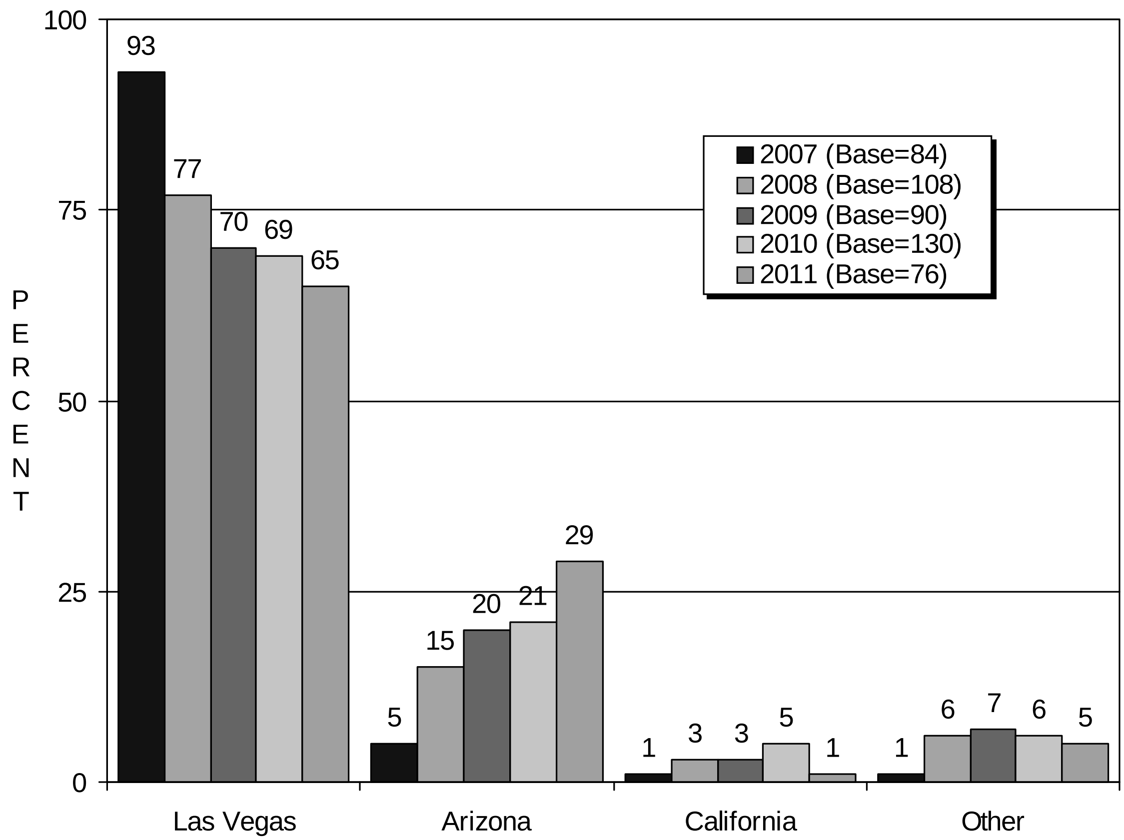
As in past years, most visitors (79%) traveled to Laughlin by automobile, truck, or motorcycle (Figure 14). Five percent (5%) traveled by bus, 13% said they came by air, and 3% came in an RV.

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



In 2011, more than nine in ten visitors (94%) arrived in Laughlin directly from their permanent residences, up significantly from 91% in 2008 and 89% last year (Figure 15).

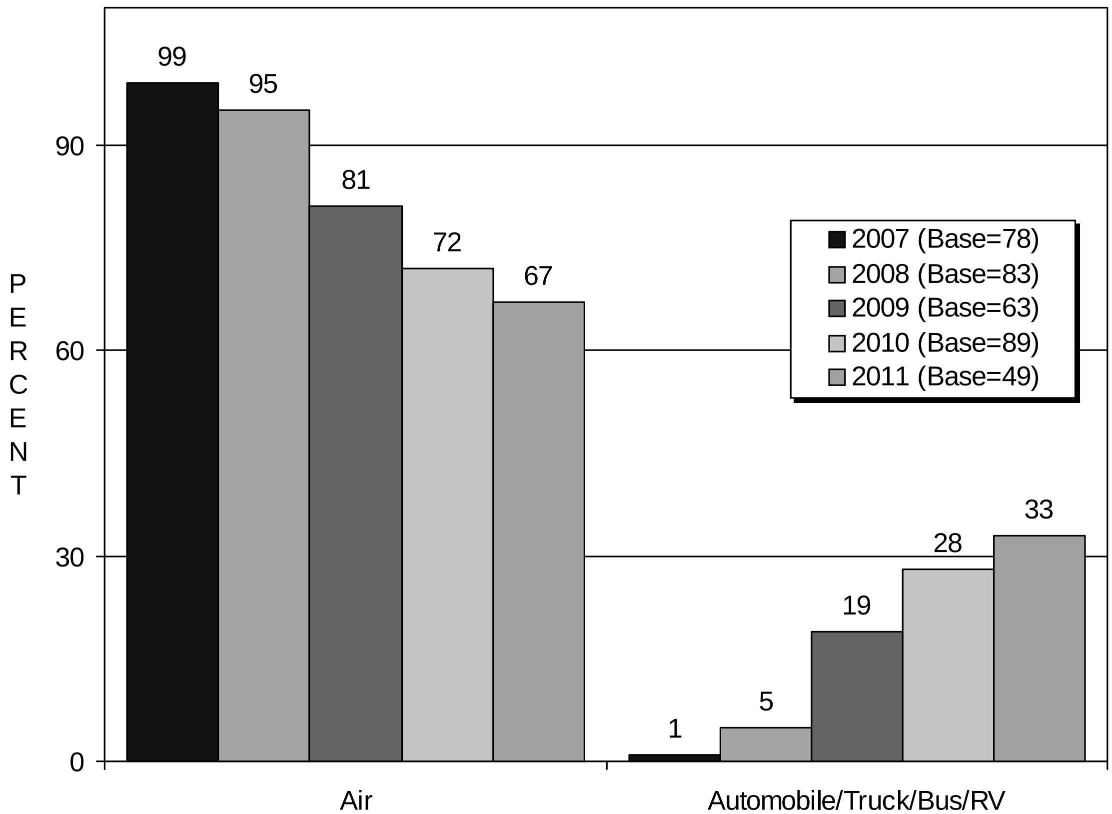
FIGURE 16
Where Visitors Came From
(Among Those Who Did Not Come To Laughlin
Directly From Their Permanent Residence)



Among those who came to Laughlin after visiting another location (Figure 16), nearly two in three (65%) came from Las Vegas, significantly lower than in 2007 (93%).

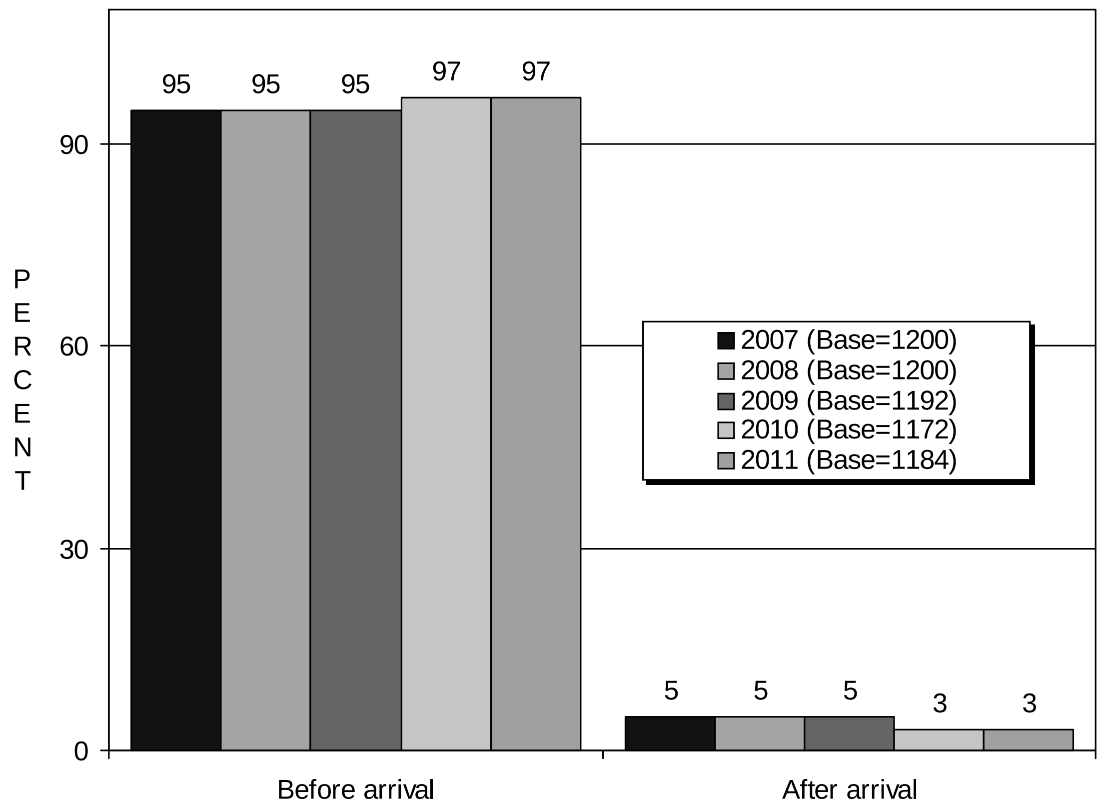
Three in ten (29%) came from Arizona, up from 5% in 2007 and 15% in 2008. One percent (1%) came from California, while 5% came from some other location.

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



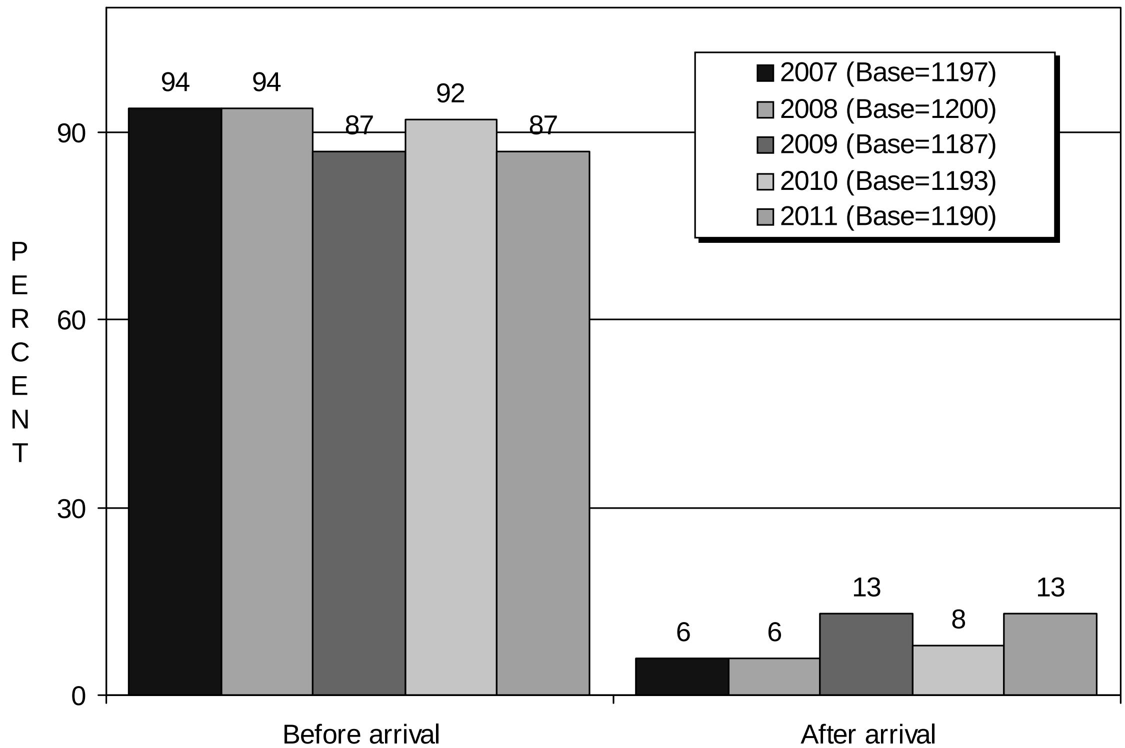
We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Two-thirds (67%) arrived by air, a significant decrease from 99% in 2007 and 95% in 2008. One-third (33%) arrived by ground transportation, up significantly from 1% in 2007 and 5% in 2008.

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



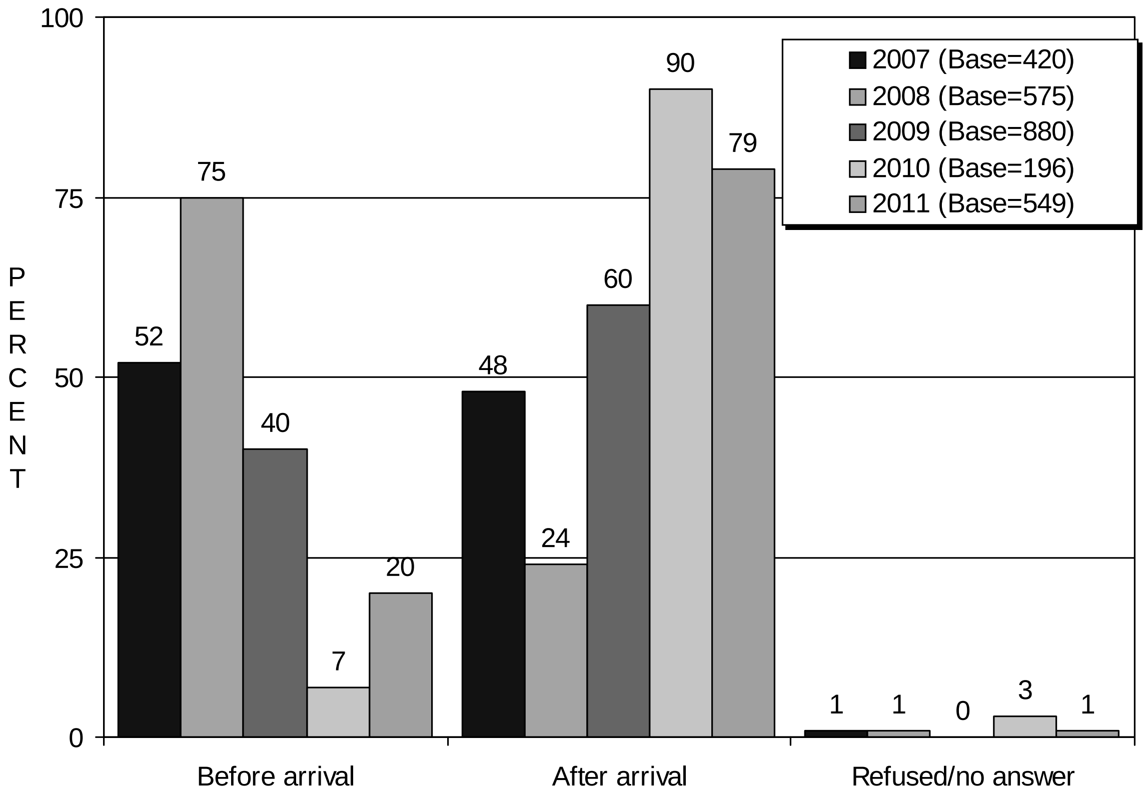
In 2011, most visitors decided where to stay in Laughlin prior to their visits (97%, up from 95% each in 2007 – 2009), while 3% decided after arrival (the same as last year, but down from down from 5% each in 2007 – 2009) (Figure 18).

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



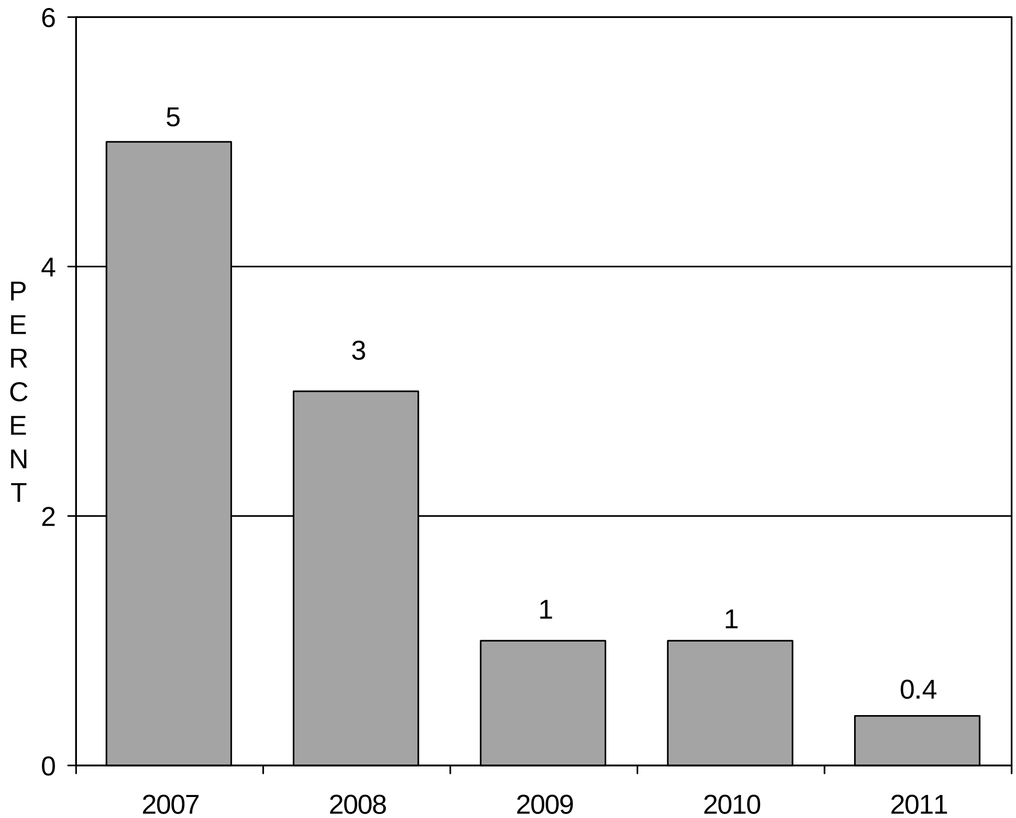
Eighty-seven percent (87%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (Figure 19), down significantly from 94% each in 2007 and 2008 and 92% last year. Thirteen percent (13%) reported making their decision about where to gamble after they arrived in Laughlin, up from 6% each in 2007 and 2008, and 8% in 2010.

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



Among visitors who reported going to see a show, 79% said they decided what shows to see after arriving in Laughlin, up significantly from 2007 – 2009 results, but down from 90% last year (Figure 20). One in five (20%) said they decided what shows to see before their arrival (down from 2007 – 2009 results, but up from 7% last year).

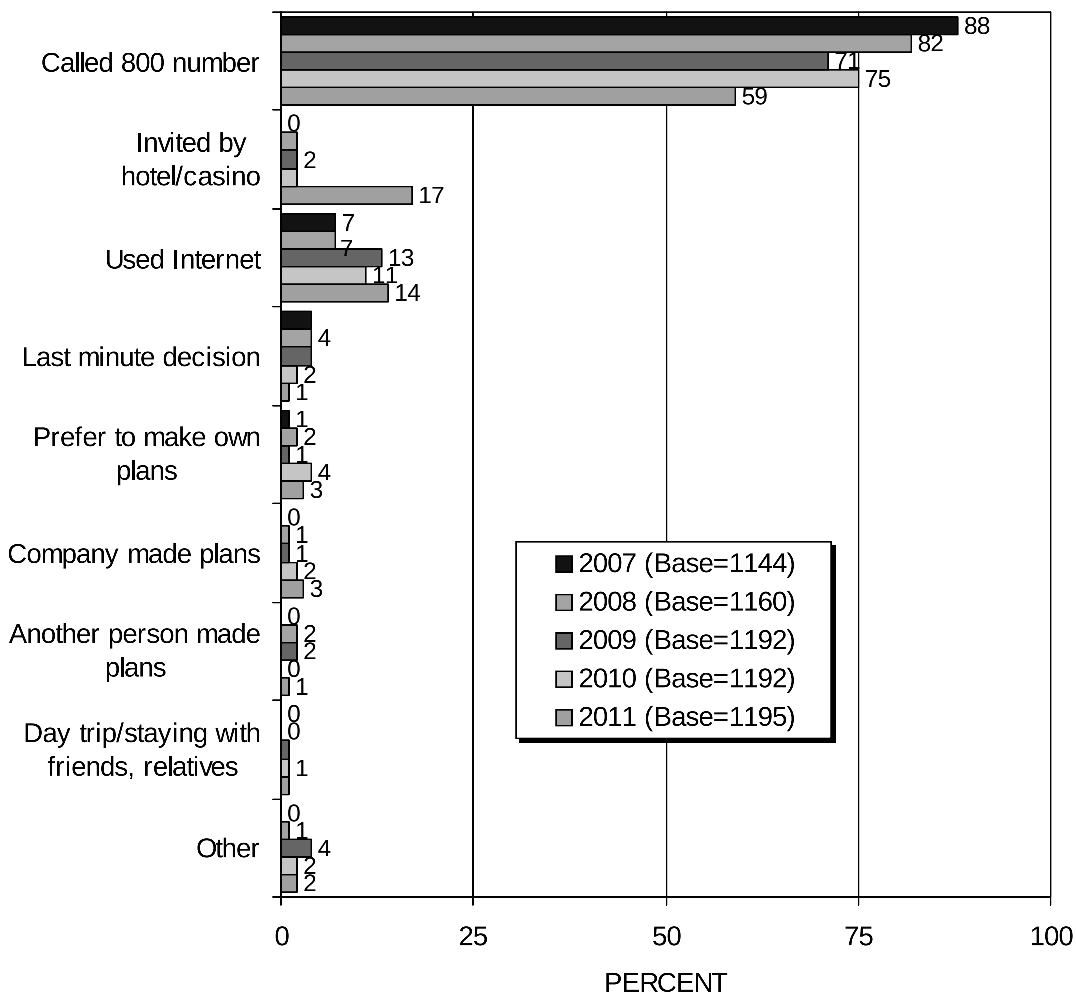
FIGURE 21
Travel Agent Assistance*
(Among All Visitors)



Less than one percent (0.4%) of all Laughlin visitors were assisted in their travel planning by a travel agent in 2011, a significant decrease from 5% in 2007 and 3% in 2008 (Figure 21).

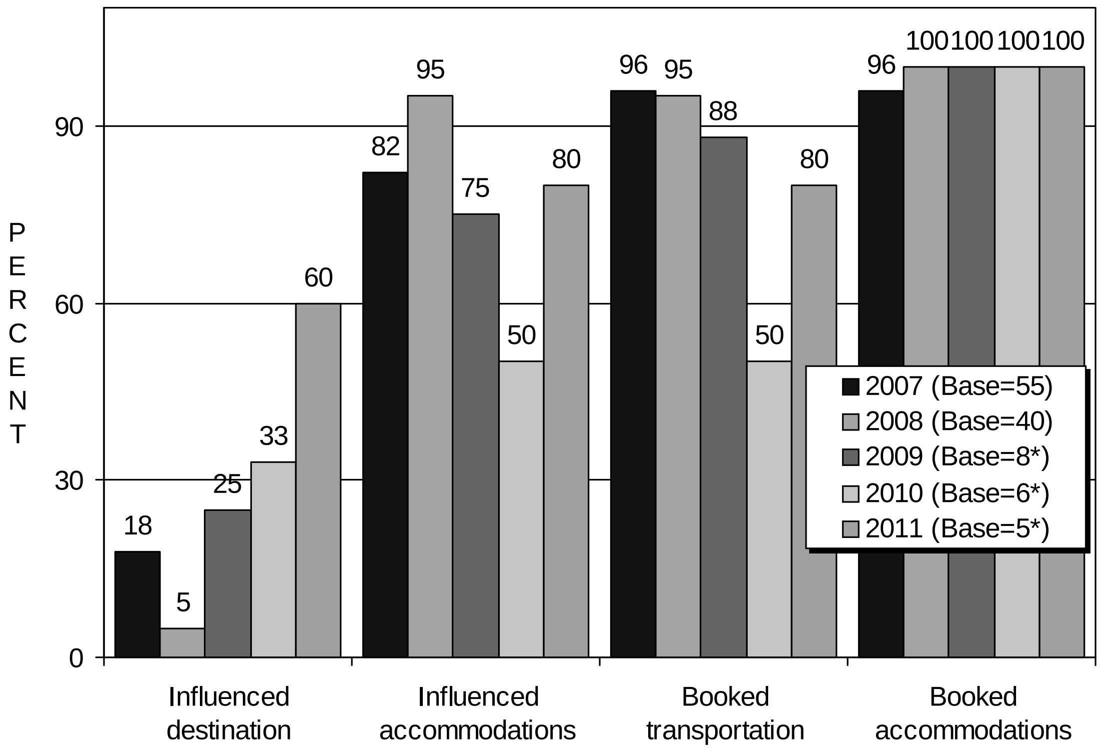
* Only “yes” responses are reported in this chart.

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). Fifty-nine percent (59%) said it was because they used an 800 number, down from 88% in 2007, 82% in 2008, 71% in 2009, and 75% last year. One in six (17%) visitors said they got an invitation from a hotel/casino, up from prior readings. Fourteen percent (14%) said they used the Internet to make their travel arrangements, up significantly from 7% each in 2007 and 2008, and 11% last year. Three percent (3%) said they preferred to make their own plans, up from 1% each in 2007 and 2009. Another 3% said a business or company made the reservations for them, up from 2007- 2009 results.

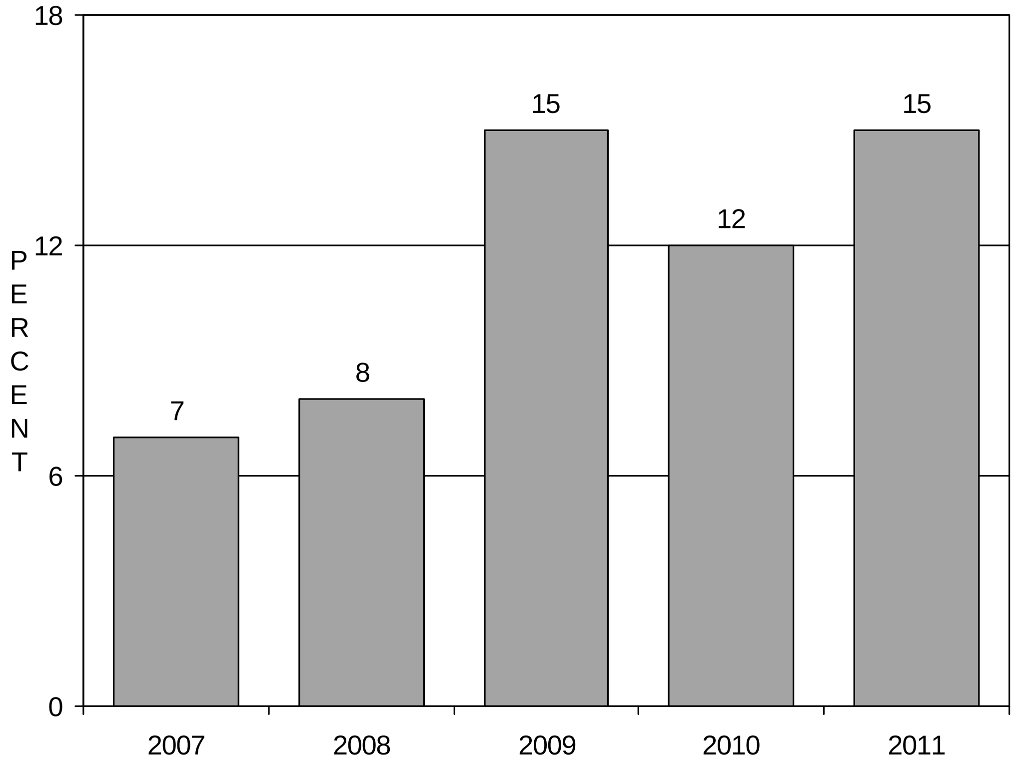
FIGURE 23
Travel Agent Influence And Use*
(Among Those Who Used A Travel Agent)



Among the five (5) visitors who reported using a travel agent in 2011 (Figure 23), all of them (100%) had the travel agent help them book their accommodations, and four (80%) had the travel agent help them book their transportation. Four (80%) said the travel agent influenced their choice of accommodations, while three (60%) said the travel agent influenced their decision to visit Laughlin.

* Base sizes in 2009, 2010, and 2011 are too small to allow reliable statistical comparisons with other years.

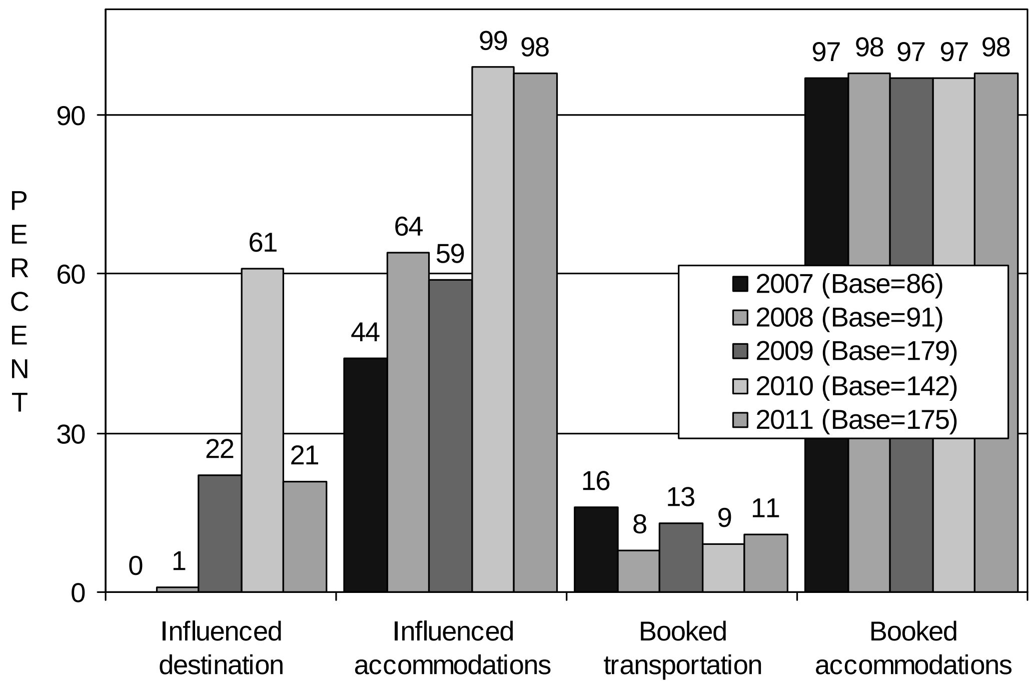
FIGURE 24
Whether Used Internet To Plan Trip*



Fifteen percent (15%) of visitors said they used the Internet to plan their trip to Laughlin in 2011, up significantly from 7% in 2007, 8% in 2008, and 12% 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)

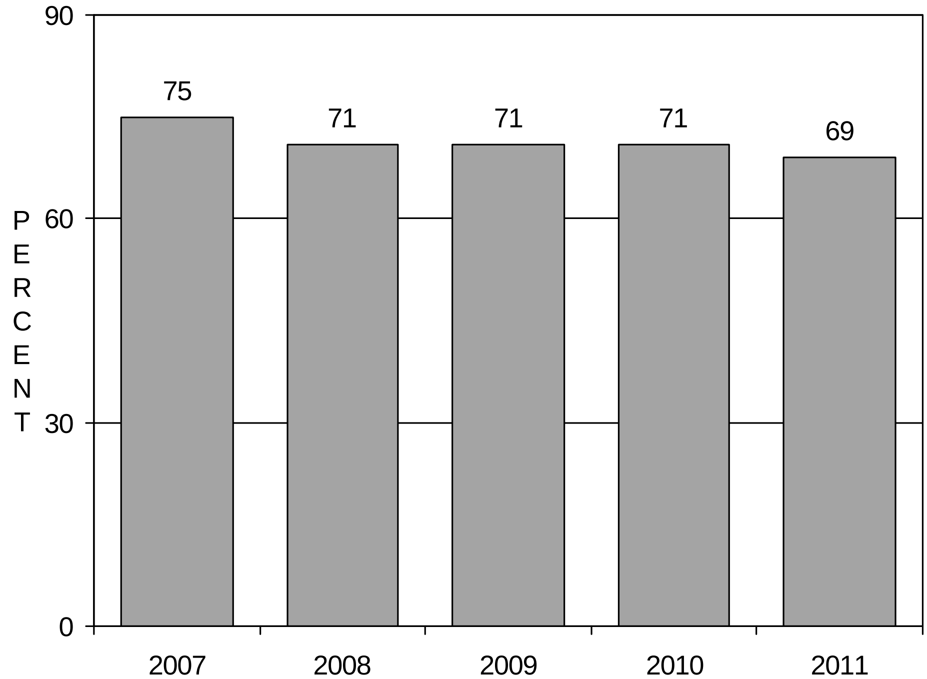


Among visitors who used the Internet to plan their trip, almost all of them (98%) booked their accommodations online, similar to the last four years (Figure 25). Virtually all of them (98%) also said the Internet influenced their choice of accommodations, similar to last year, but up significantly from 44% in 2007, 64% in 2008, and 59% in 2009. One in five (21%) also said the Internet influenced their decision to visit Laughlin, down from 61% last year, but up from 1% or less in 2007 and 2008. Eleven percent (11%) said they booked transportation to Laughlin online, not significantly different from past years.

---

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

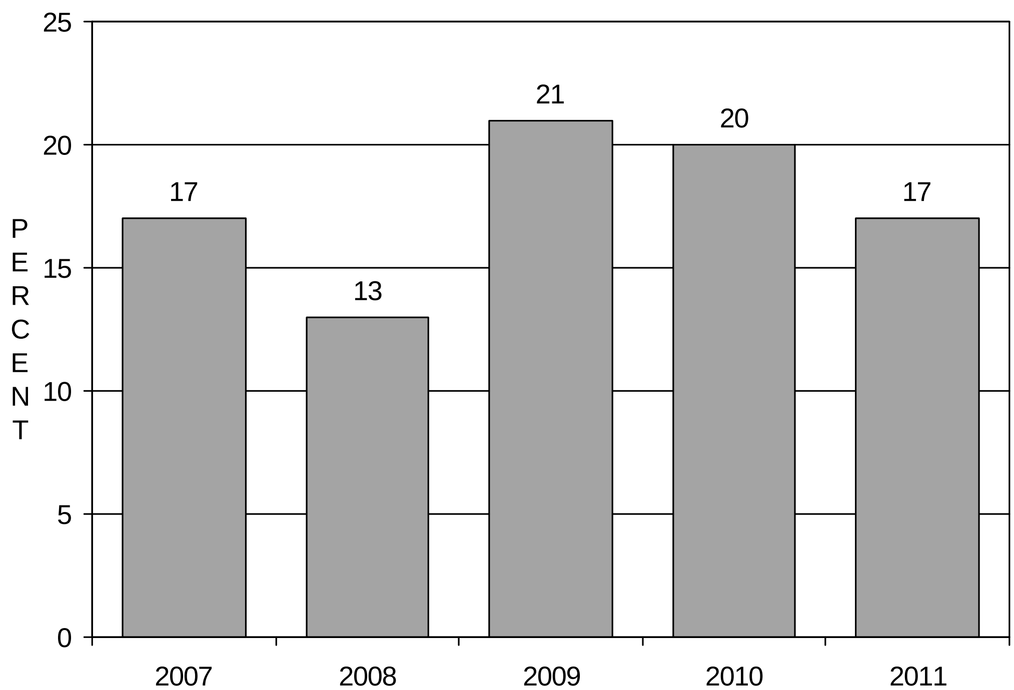
FIGURE 26
Whether Visited Las Vegas During Past Five Years*



Nearly seven in ten Laughlin visitors (69%) said they have visited Las Vegas in the past five years, down significantly from 75% in 2007 (Figure 26).

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

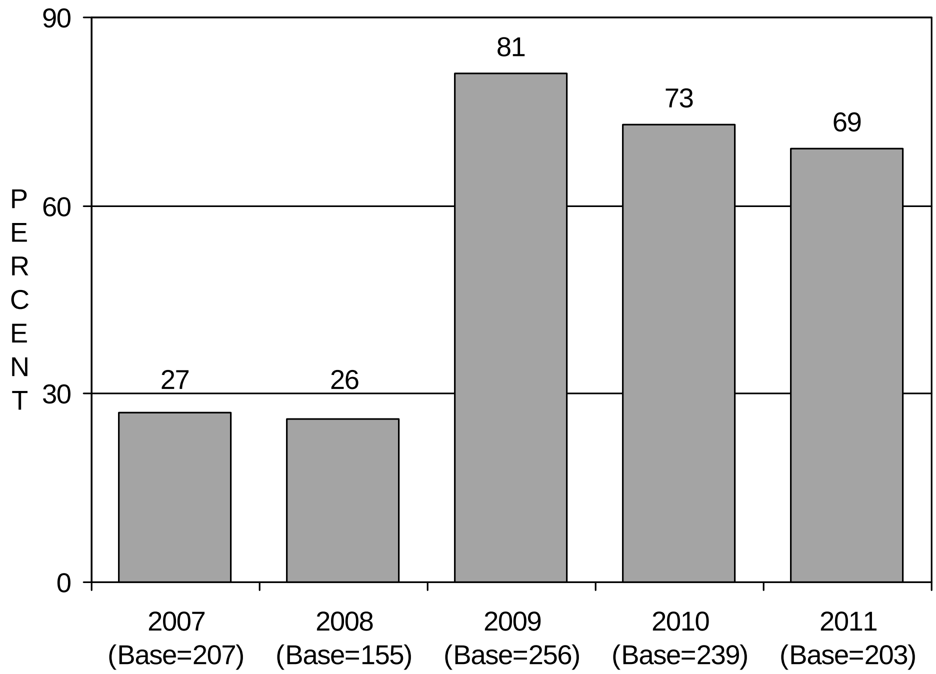
FIGURE 27
Visiting Las Vegas
On This Trip To Laughlin*



One in six Laughlin visitors (17%) said they had visited or were planning to visit Las Vegas on this trip, up from 13% in 2008 but down from 21% in 2009 (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)



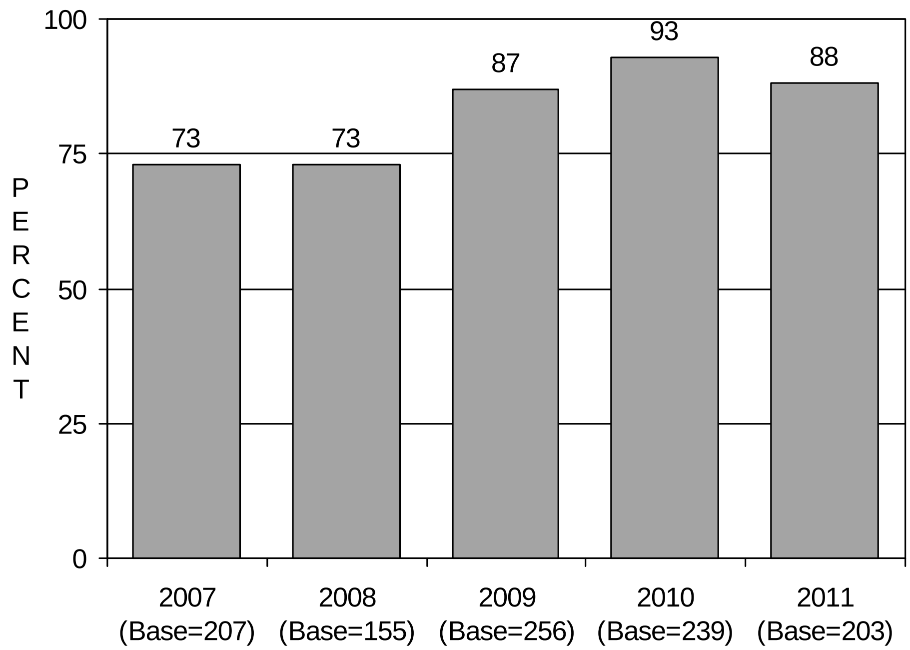
Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, 69% said they had visited or intended to visit Downtown down from 81% in 2009 but up from 27% in 2007 and 26% in 2008 (Figure 28).

---

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

Beginning in 2009, this question was refined to address better the accuracy of survey responses. GLS Research believes that the 2009-2011 results more accurately reflect the Laughlin visitor.

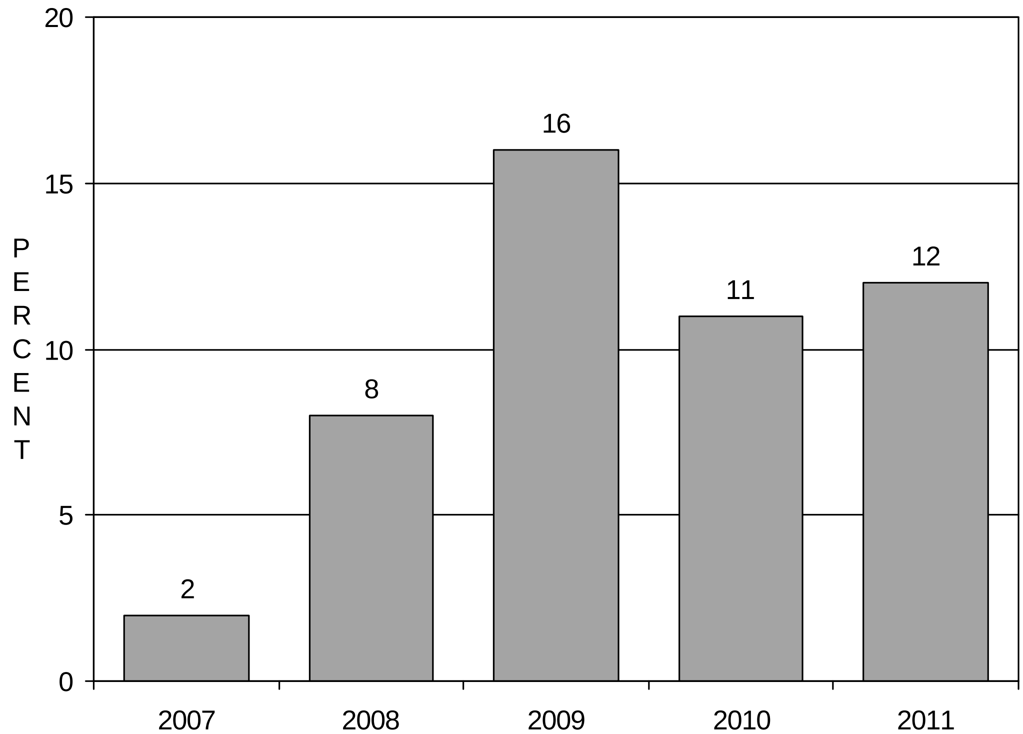
FIGURE 29
Visiting The Las Vegas Strip*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among those who visited or planned to visit Las Vegas on this trip to Laughlin, 88% said they intended to visit the Strip, up significantly from 73% each in 2007 and 2008 (Figure 29).

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

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

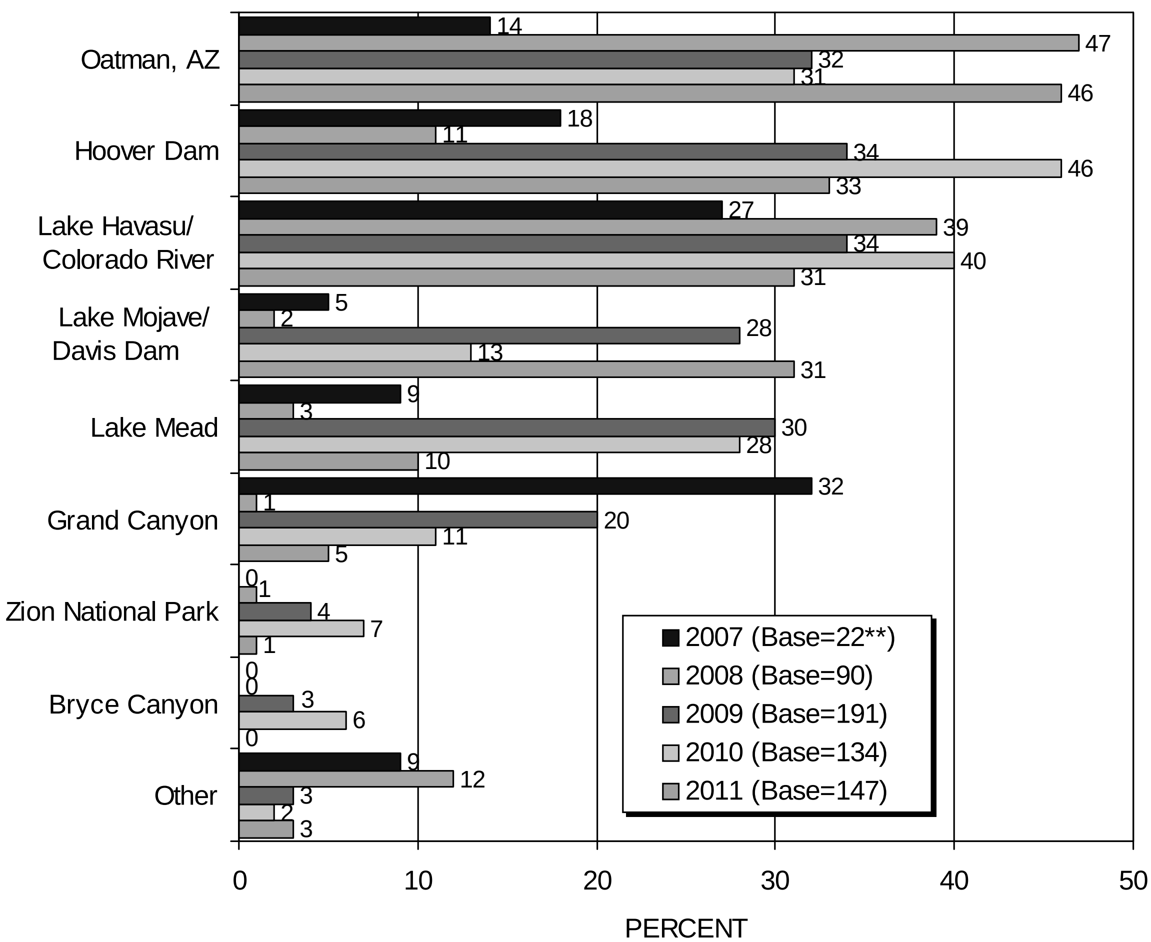


We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 30) and 12% said yes, down significantly from 16% in 2009 but up from 2% in 2007 and 8% in 2008.

---

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

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



Laughlin visitors who said they visited nearby places (Figure 31) were most likely to have visited Oatman (46%, up from 32% in 2009 and 31% in 2010), Hoover Dam (33%, up significantly from 11% in 2008 but down from 46% last year). Thirty-one percent (31%) each visited the Lake Havasu/Colorado River area and the Lake Mojave/Davis Dam area (up from 2% in 2008 and 13% last year). One in ten (10%) visited Lake Mead (up from 3% in 2008 but down from 30% in 2009 and 28% last year). Five percent (5%) went to the Grand Canyon, down from 20% in 2009 and 11% last year.

---

* 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). Eighty-five percent (85%) reported two adults in their party, up from 78% in 2008 and 68% in 2009. Ten percent (10%) said they were traveling alone, an increase from 7% each in 2008 and 2009. Five percent (5%) percent said they were traveling in a party of three or more people, up significantly from 3% last year. The average party size in 2011 was 2.0 persons, down significantly from 2007 – 2009 but up significantly from 1.9 last year.

FIGURE 32
Adults In Immediate Party

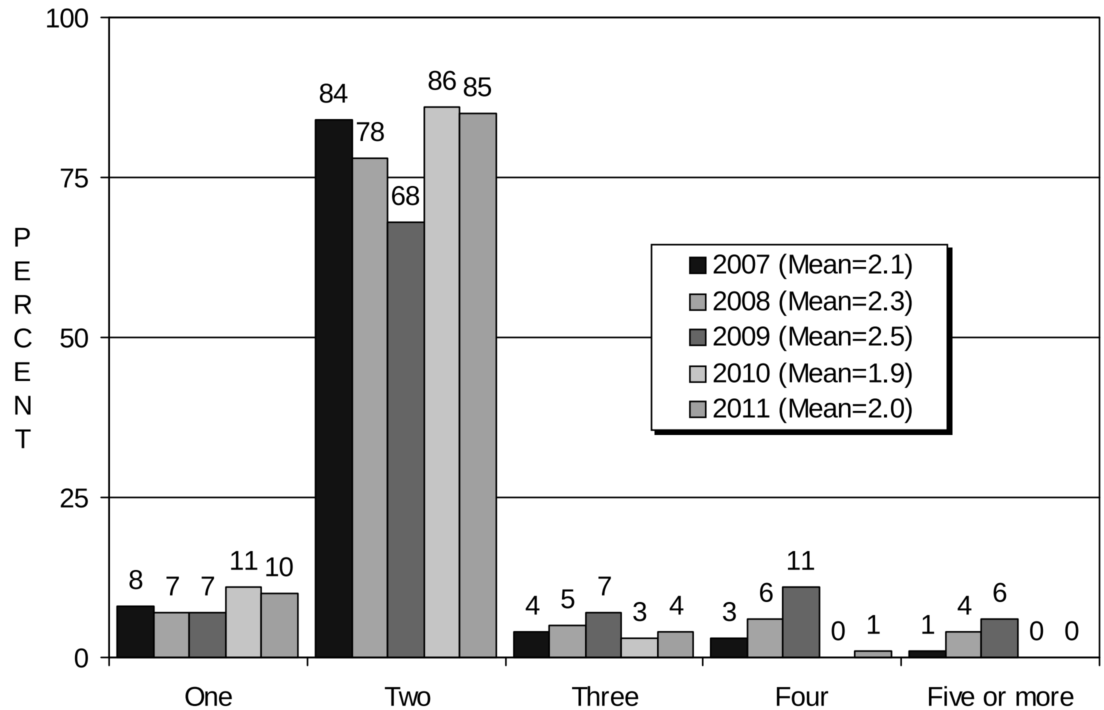
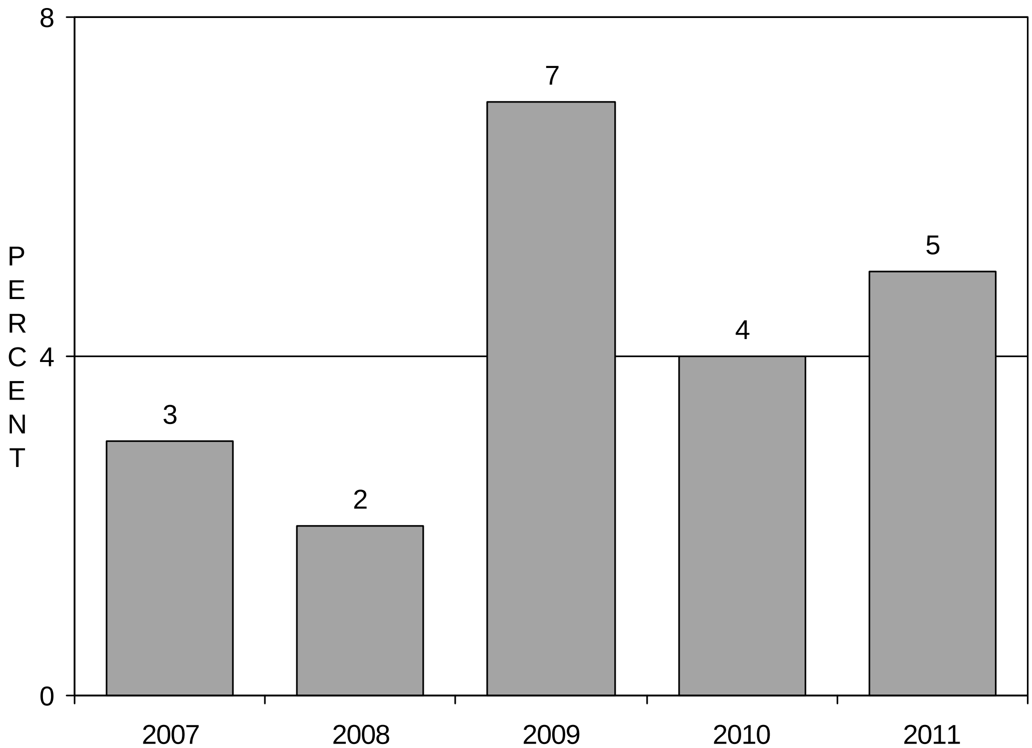


FIGURE 33
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 33). Five percent (5%) said their party included someone under the age of 21, up significantly from 3% in 2007 and 2% in 2008.

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

FIGURE 34
Nights Stayed

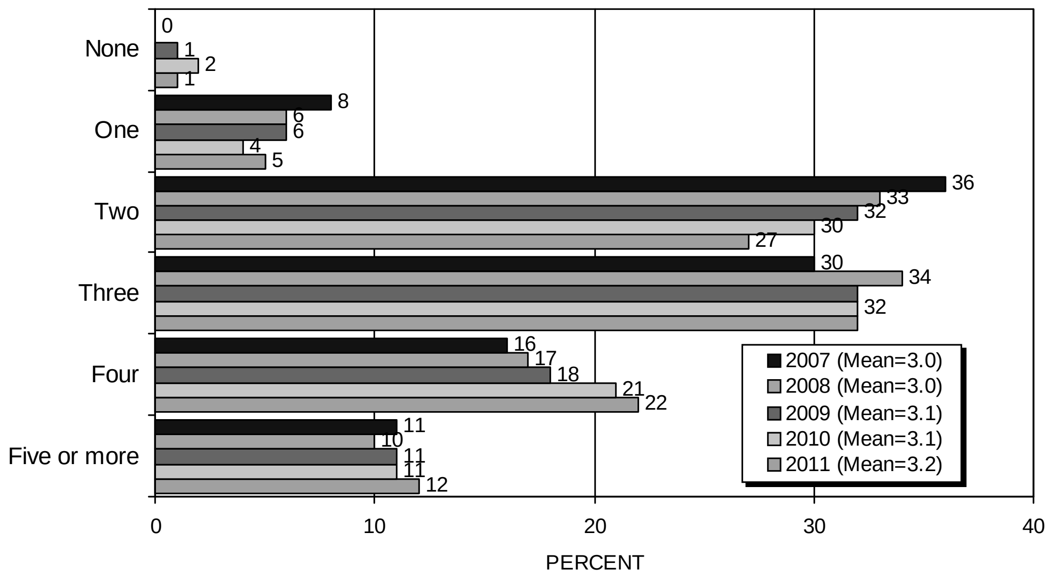
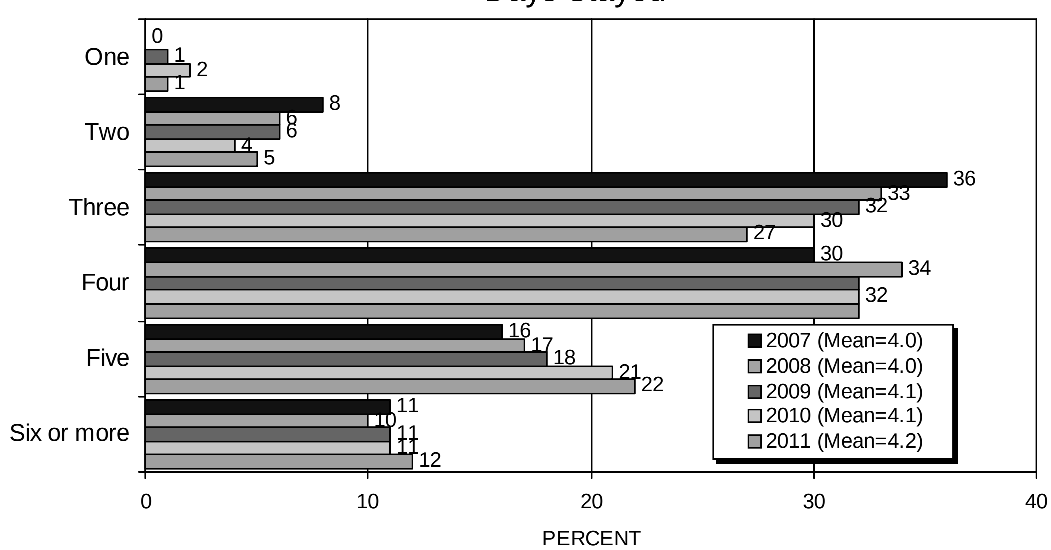
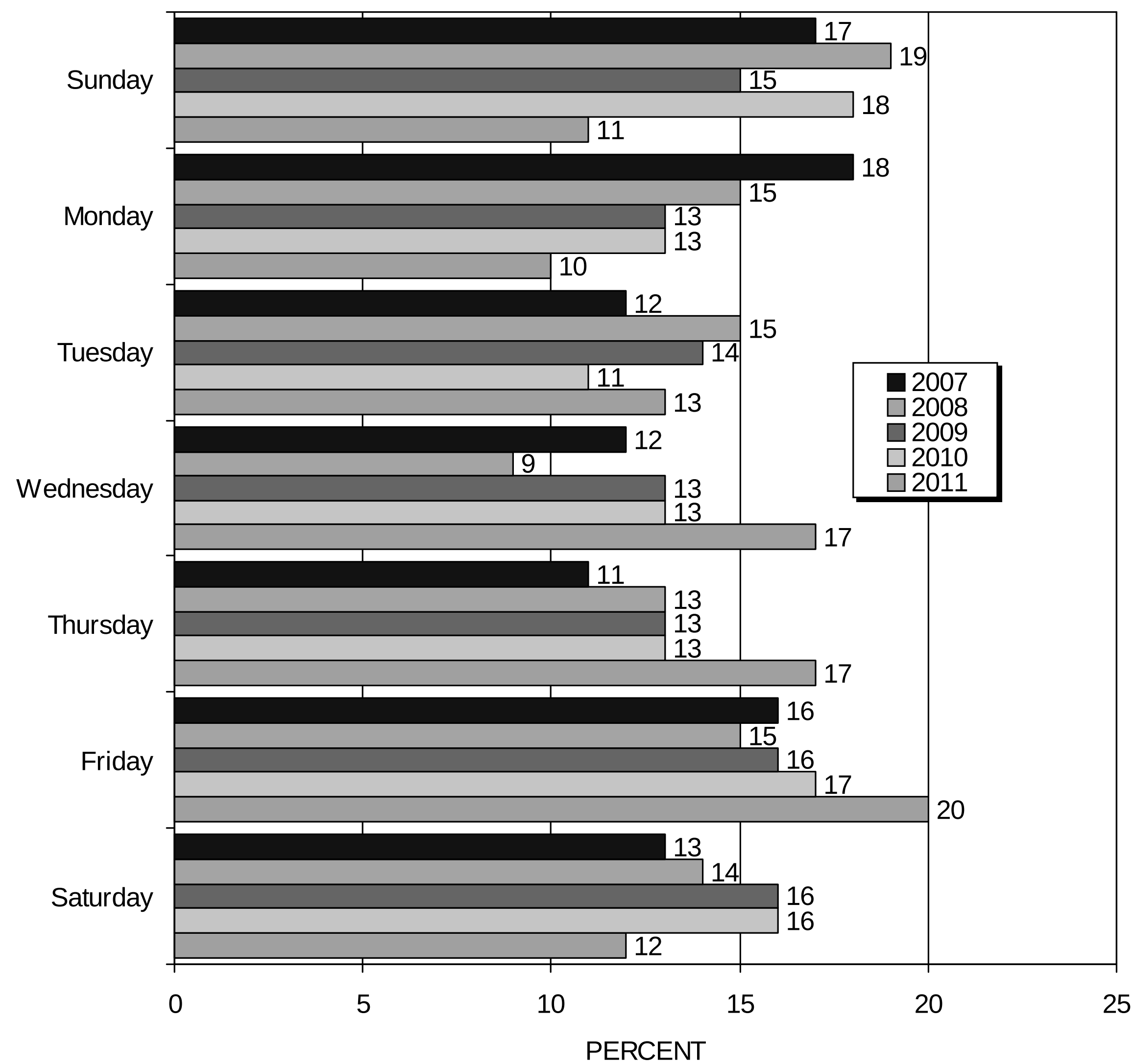


FIGURE 35
Days Stayed



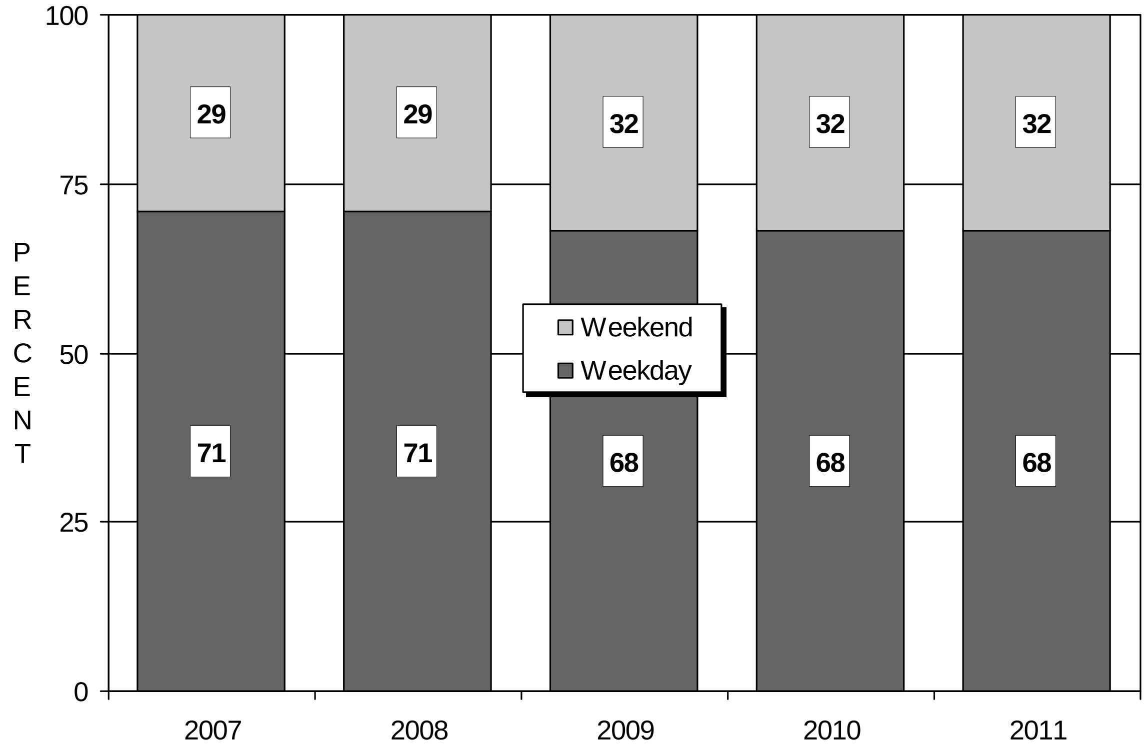
During 2011, Laughlin visitors stayed an average of 3.2 nights and 4.2 days, up from 3.0 nights and 4.0 days in 2007 and 2008 (Figures 34 and 35).

FIGURE 36
Day Of Arrival



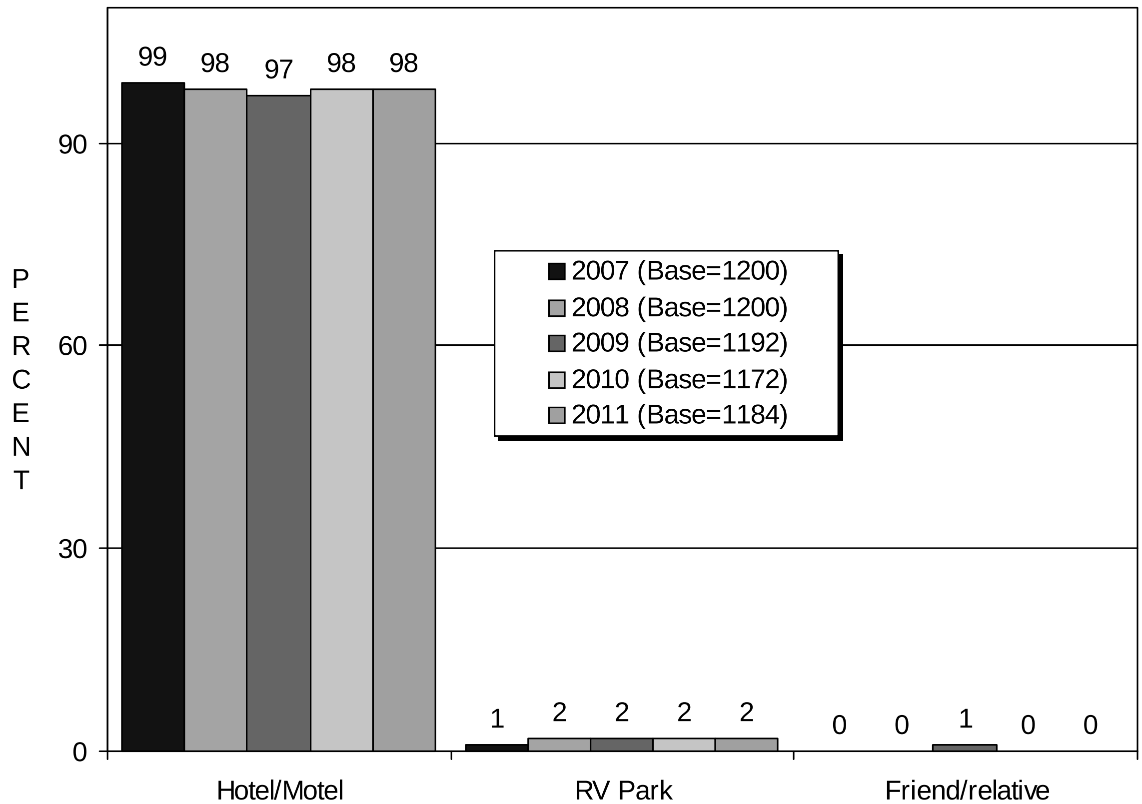
Visitors were most likely to arrive in Laughlin on a Friday (20%) and least likely to arrive on a Monday (10%) (Figure 36). They were significantly more likely to arrive on a Wednesday or a Thursday (17% each) than in past readings.

FIGURE 37
Weekend Versus Weekday Arrival



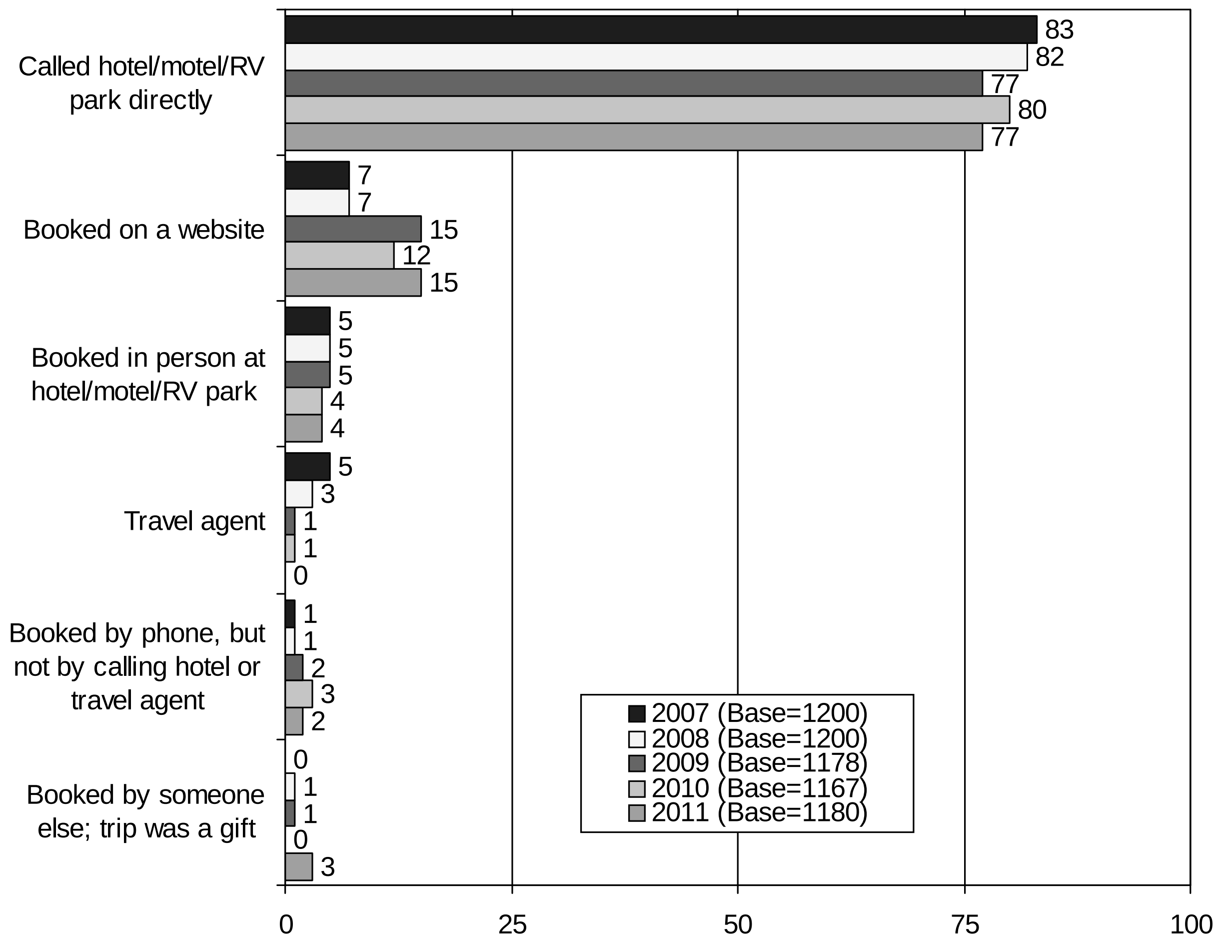
Thirty-two percent (32%) of visitors arrived in Laughlin on the weekend (Friday or Saturday), while 68% of visitors arrived on a weekday (Sunday through Thursday), similar to past years (Figure 37).

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



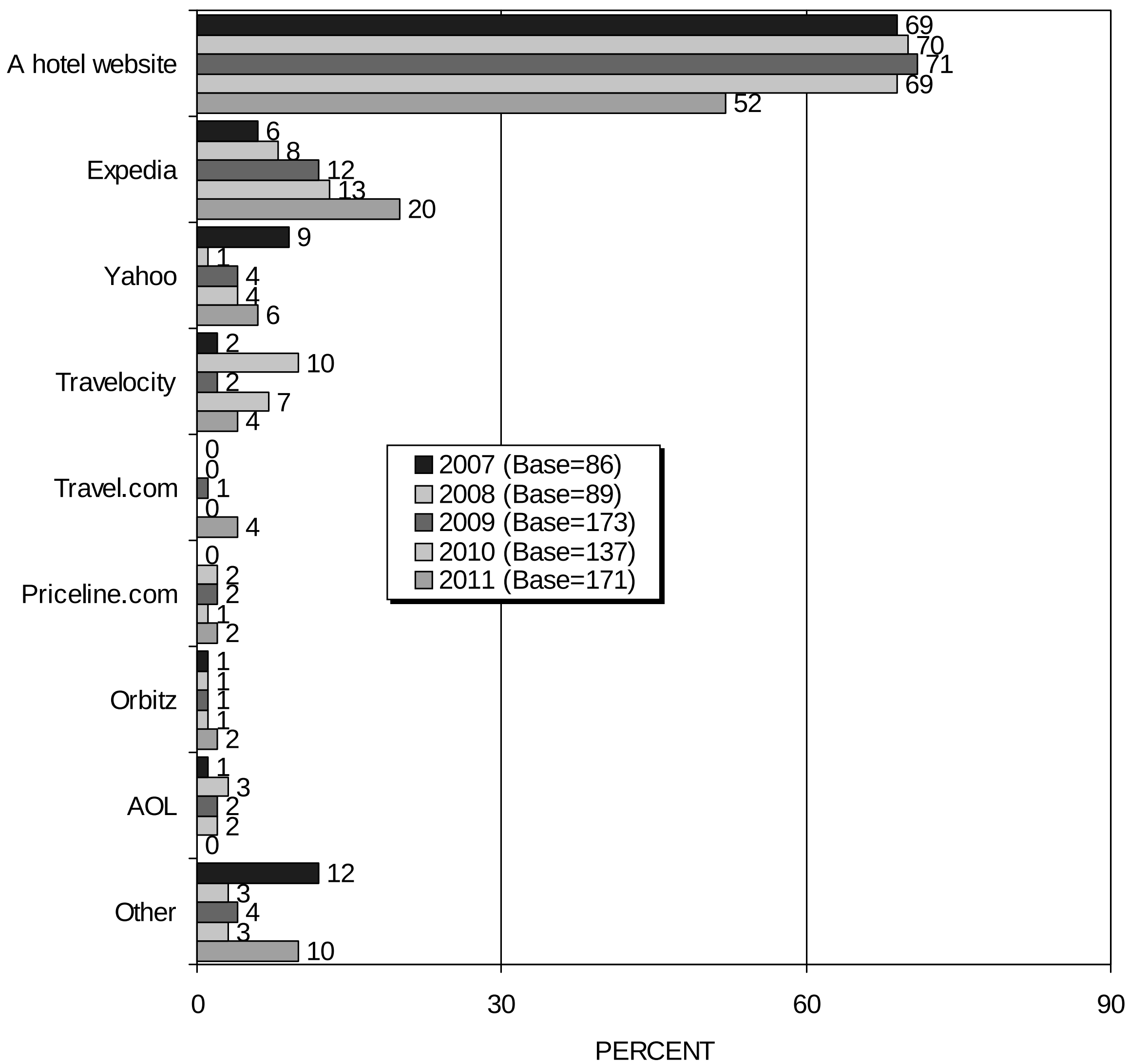
As shown in Figure 38, among visitors who stayed overnight 98% stayed in a hotel, down from 99% in 2007.

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



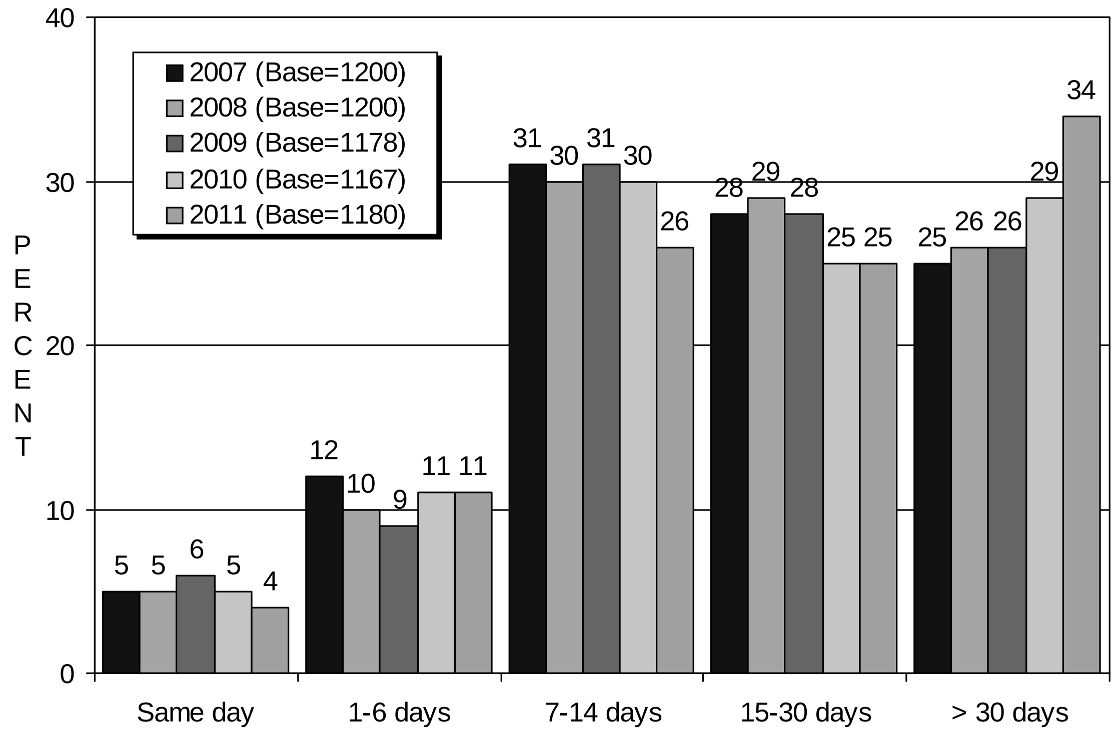
Visitors were asked how they booked their accommodations (Figure 39). In 2011, 77% said they booked their accommodations by calling the property directly (down from 83% in 2007, 82% in 2008, and 80% last year), while 15% booked on a website (up from 7% each in 2007 and 2008, and 12% last year), 4% booked in person, less than 1% booked through a travel agent (down from 5% in 2007 and 3% in 2008), and 2% booked by phone but not by calling the hotel or a travel agent (down from 3% last year but up from 1% each in 2007 and 2008).

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



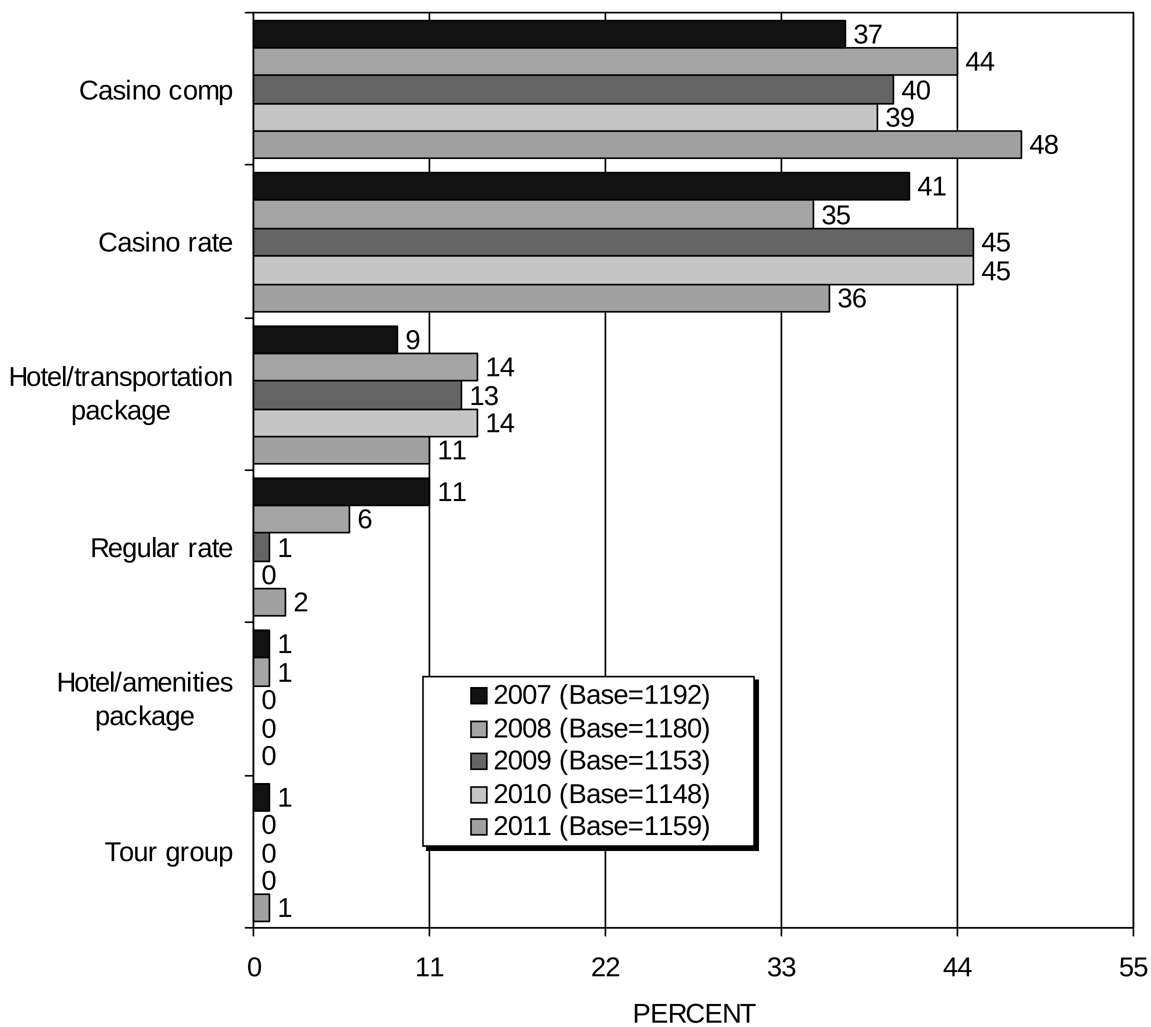
Visitors who booked their accommodations on a website were asked which one they used (Figure 40). Just over one-half (52%) said they used a hotel website to book their accommodations, a significant decrease from 2007 – 2010 readings. One in five (20%) used Expedia (up from 6% in 2007, 8% in 2008, and 12% in 2009), 6% used Yahoo (up from 1% in 2008), 4% each used Travelocity or Travel.com, 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). Four percent (4%) of visitors booked accommodations the same day (down from 6% in 2009), 11% booked one to six days in advance (up from 9% in 2009), 51% booked seven to 30 days in advance (down from 59% each from 2007 - 2009), and 34% booked more than 30 days in advance (up from 25% in 2007, 26% each in 2008 and 2009, and 29% last year).

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 (84%) reported receiving some type of casino rate — either a casino rate (36%, down from 41% in 2007 and 45% each in 2009 and 2010) or a casino complimentary rate (48%, up from 2007 – 2010 results). Eleven percent (11%) received a hotel-transportation package, down from 14% each in 2008 and 2010. Two percent (2%) said they received a regular room rate, up from 1% in 2009 and less than 1% last year but down significantly from 11% in 2007 and 6% in 2008.

FIGURE 43
Room Rate By Booking Method
(2011)

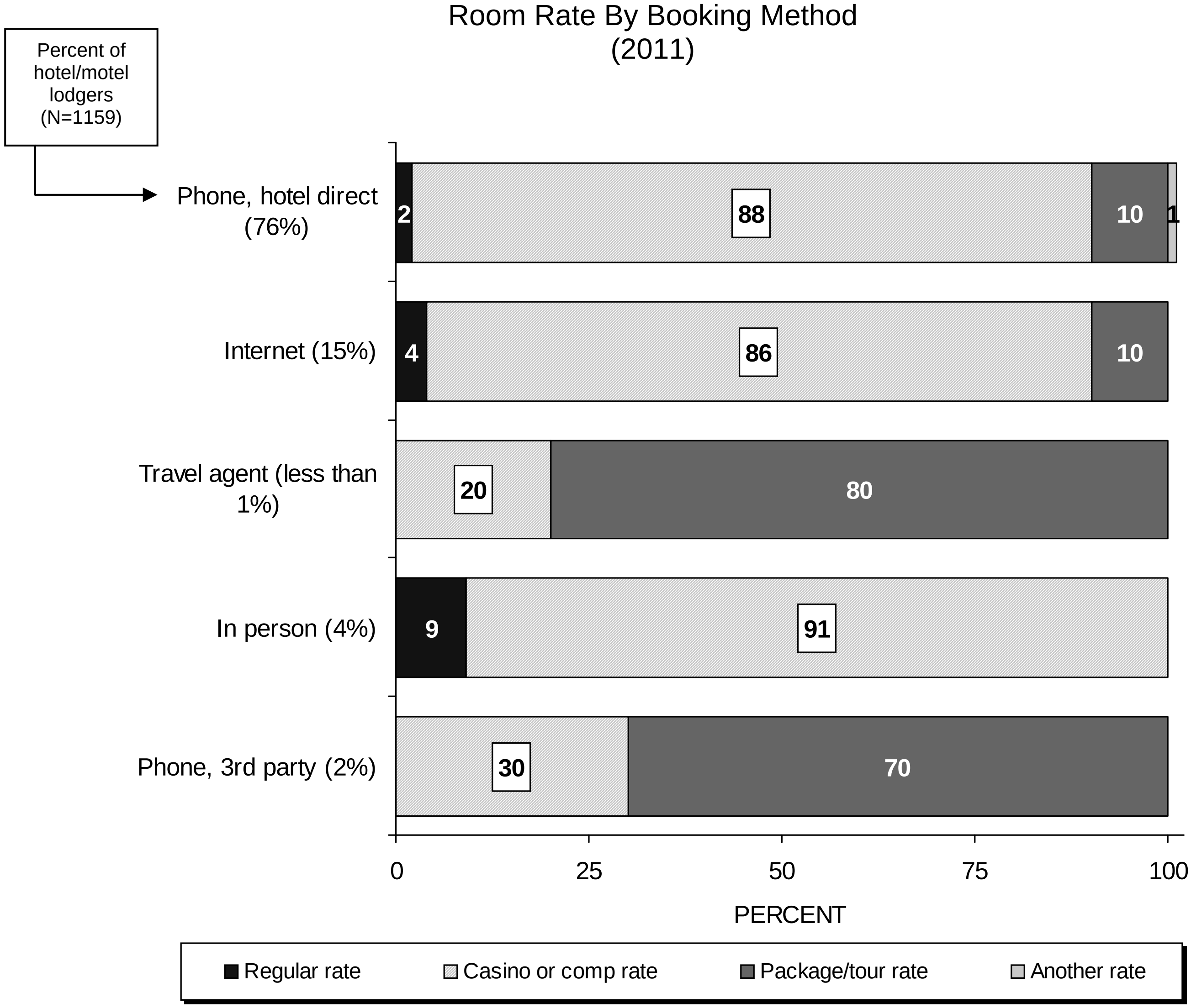
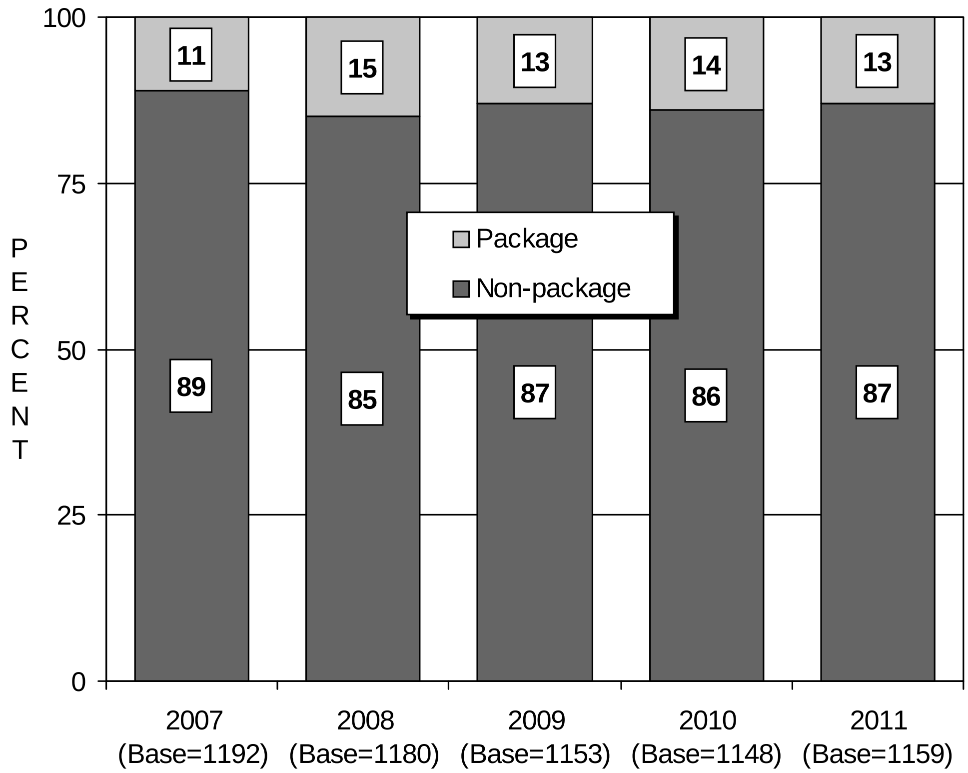


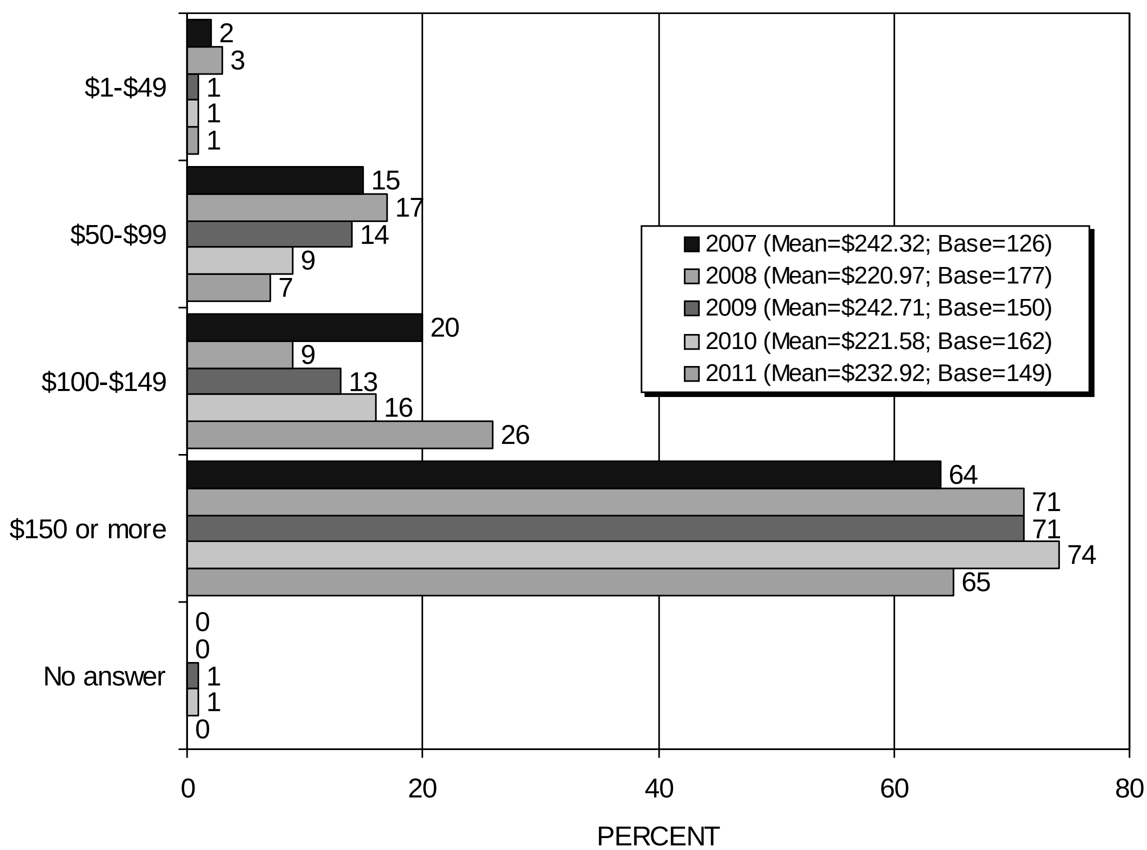
Figure 43 shows the room rate category by the booking method for 2011 among those staying in a hotel or motel. Almost nine out of ten (88%) of those who called the hotel directly received a casino or casino complimentary rate, while 10% received a package or tour rate. More than eight in ten of those who booked on the Internet (86%) and more than nine in ten who booked in person (91%) also received a casino or casino complimentary rate. Eighty percent (80%) of those who booked through a travel agent received a package or tour rate, while 20% received a casino rate. Among those who booked on the phone through a third party, 70% received a package or tour rate and the remaining 30% received a casino or casino complimentary rate.

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



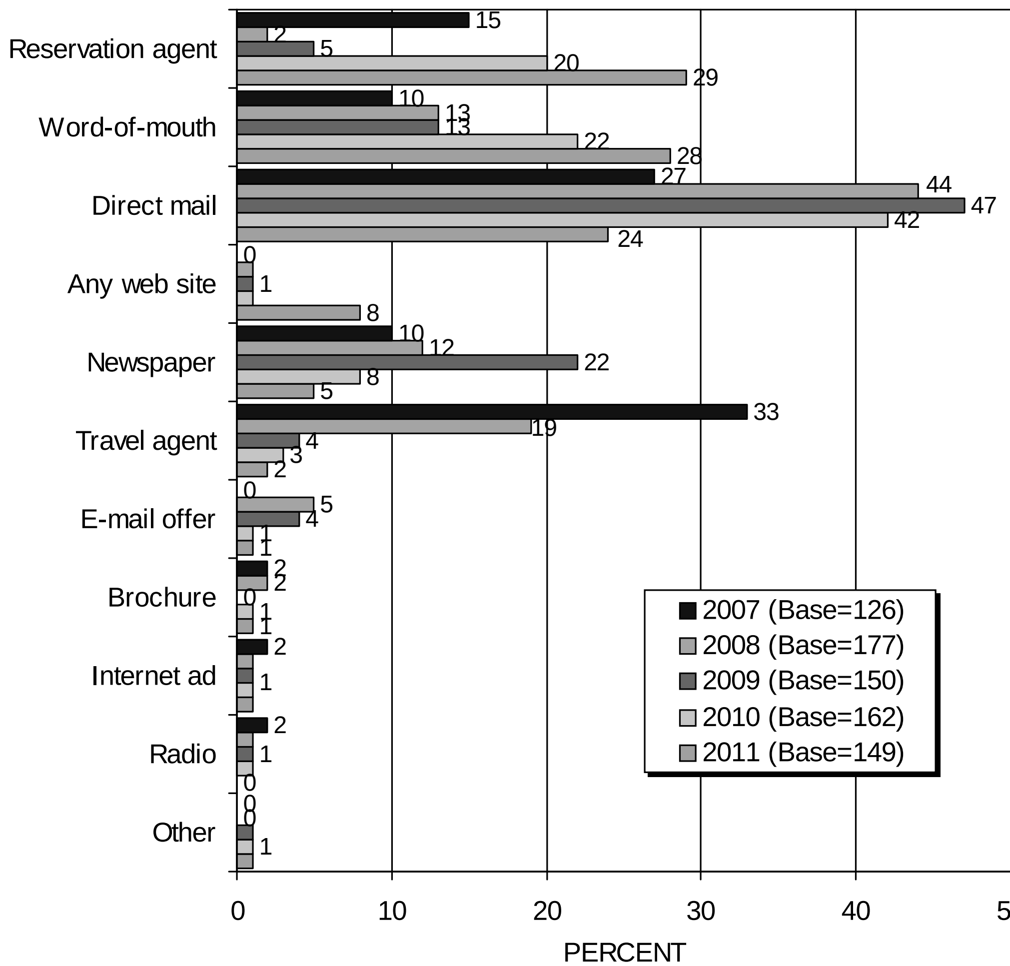
In 2011, 13% received their lodging as part of a package deal, not significantly different from past years (Figure 44).

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



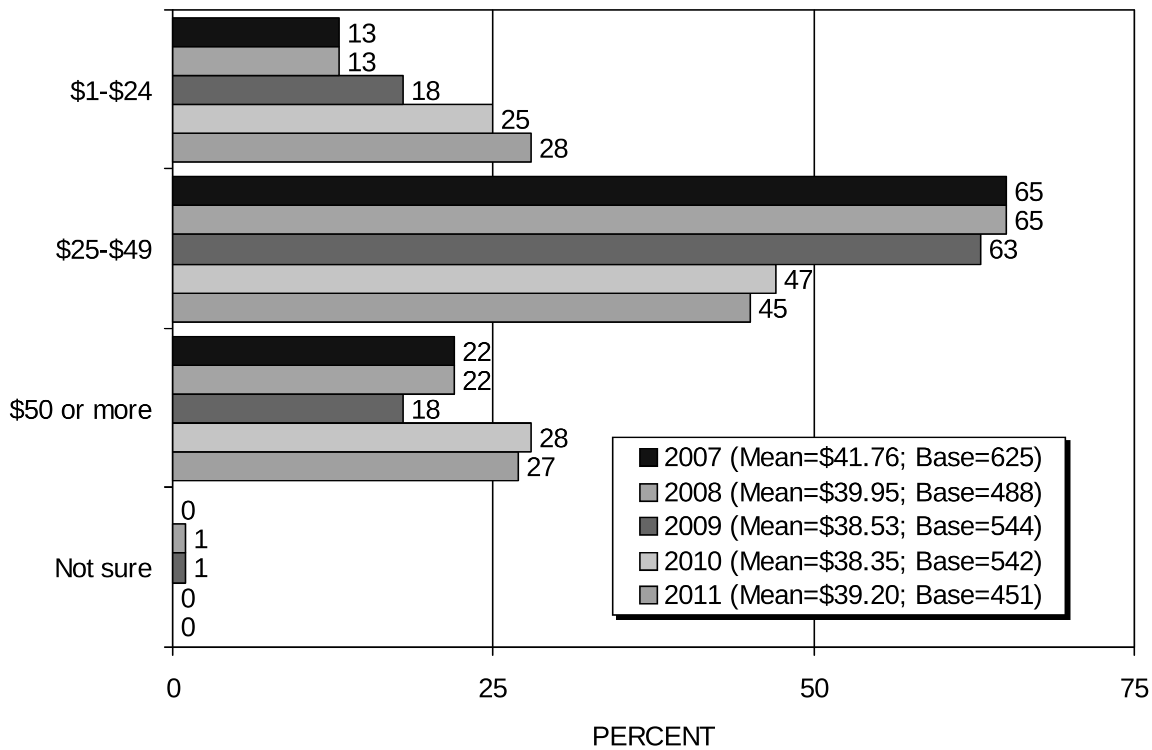
We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 45). Nearly two-thirds (65%) said they paid $150 or more for their package. Twenty-six percent (26%) paid $100 to $149 (up from 9% in 2008, 13% in 2009, and 16% last year), 7% paid $50 to $99 (down significantly from 15% in 2007 and 17% in 2008), and 1% paid less than $50. The average package cost was $232.92, not significantly different from the 2007 to 2010 averages.

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



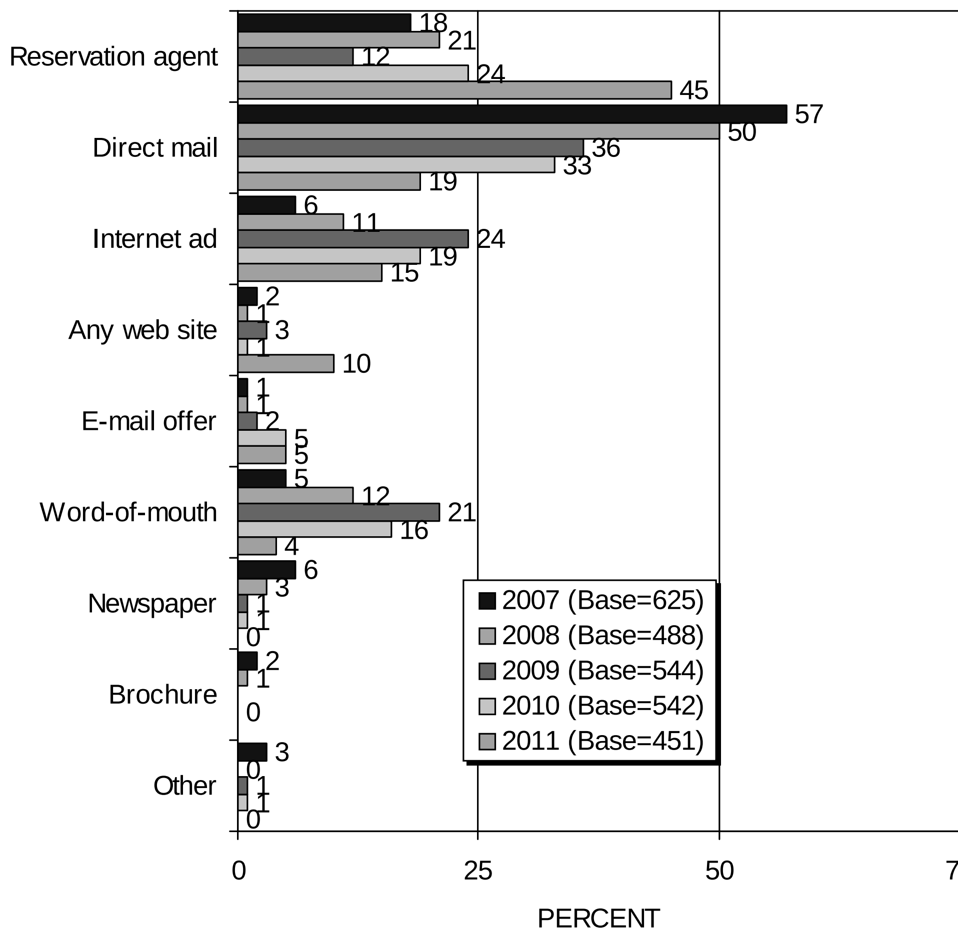
Package purchasers were asked how they first found out about the package they bought for their trip to Laughlin (Figure 46). Nearly three in ten (29%) heard about the package through a reservation agent or call center (up significantly from 15% in 2007, 2% in 2008, and 5% in 2009), 28% said they first heard about the offer through word-of-mouth (up from 10% in 2007 and 13% each in 2008 and 2009), and 24% said they received an offer through the mail (down significantly from 44% in 2008, 47% in 2009, and 42% last year). Eight percent (8%) said they heard about their package through a web site (up from past years), 5% found out about the package in a newspaper (down significantly from 22% in 2009), and 2% heard about the package through a travel agent (down from 33% in 2007 and 19% in 2008).

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



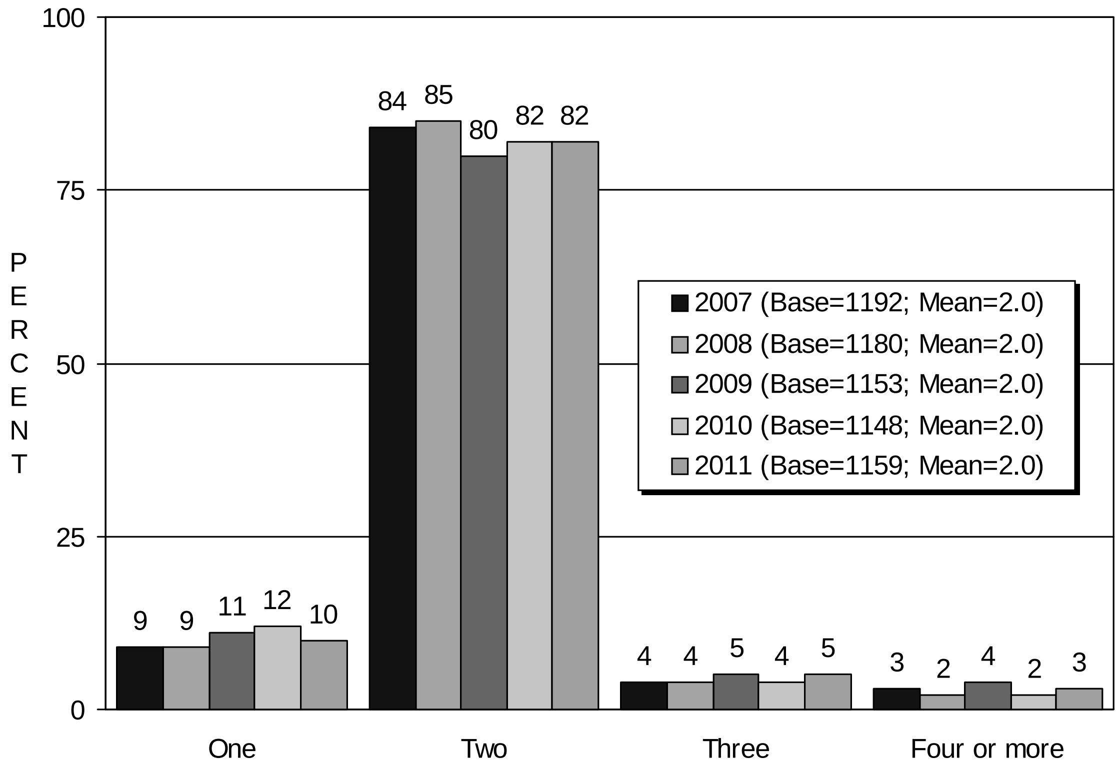
The average reported room cost among non-package hotel and motel lodgers in 2011 was $39.20, not significantly different from past years (Figure 47). More than one-quarter (28%) reported spending less than $25 on their room, up from 13% each in 2007 and 2008, and 18% in 2009. Forty-five percent (45%) spent between $25 and $49, down from 65% each in 2007 and 2008, and 63% in 2009. The remaining 27% reported spending $50 or more, up from 22% each in 2007 and 2008 and 18% in 2009.

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



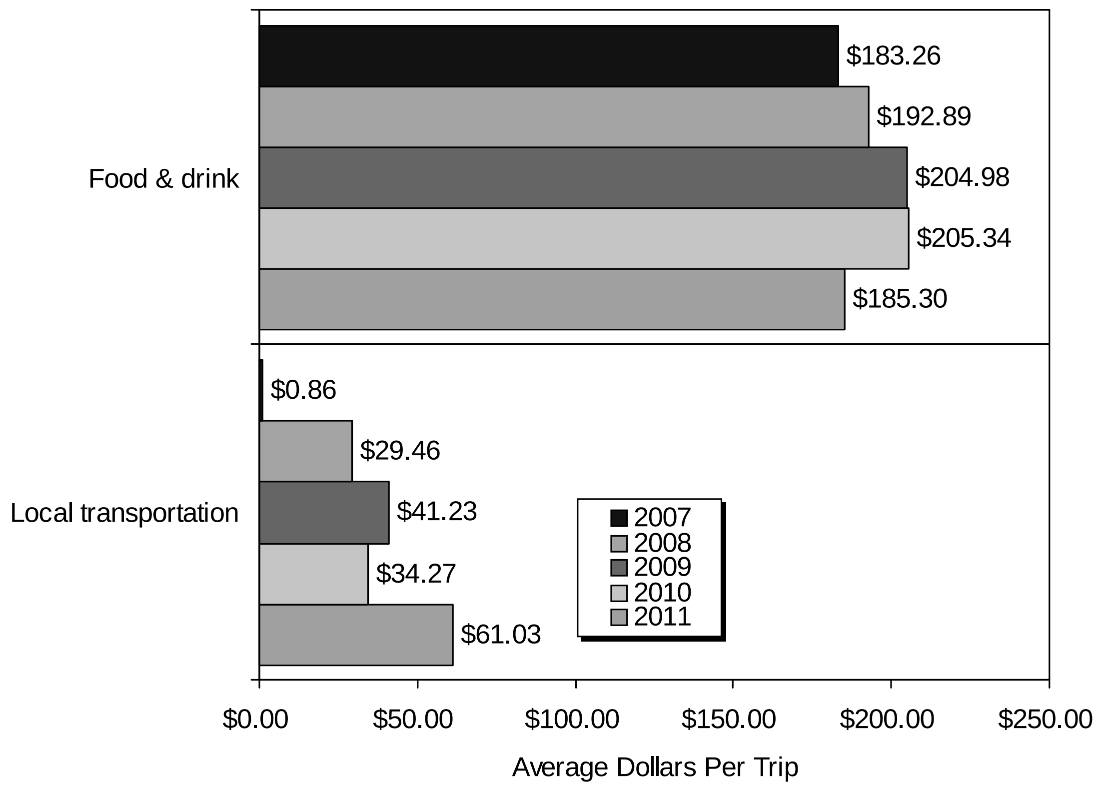
Non-package hotel and motel lodgers were asked how they first found out about the room rate they paid (Figure 48). Nearly one-half (45%) said they first heard of their room rate from a reservation agent or through a call center, up significantly from 2007 – 2010 results. Nineteen percent (19%) said they received an offer in the mail, a significant decrease from 2007 – 2010. Fifteen percent (15%) saw an advertisement on the Internet (down from 24% in 2009 but up from 6% in 2007), while 10% said they heard about it through a web site (up from past years), and 5% heard about the rate from an e-mail offer, up significantly from 1% – 2% from 2007 – 2009. Four percent (4%) said they heard about it through word of mouth (down from 12% in 2008, 21% in 2009, and 16% in 2010).

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



As Figure 49 shows, the majority of visitors (82%) said that two people stayed in their room. The average number of room occupants per hotel/motel room was 2.0 occupants.

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.

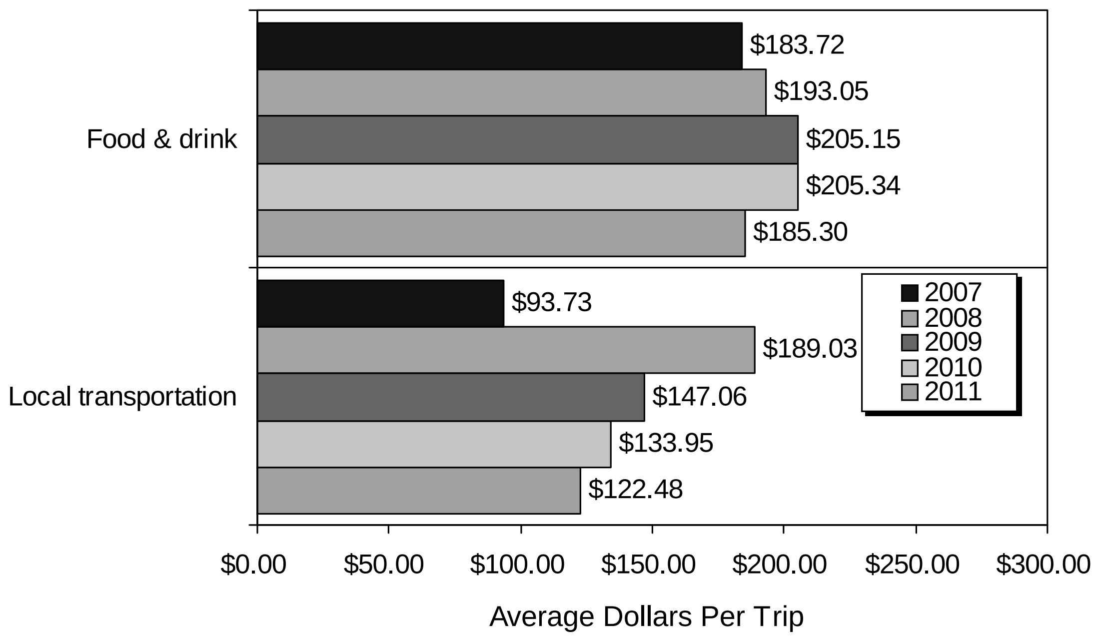
Figure 50 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In 2011, the average food and drink expenditures were $185.30 per trip, down significantly from $204.98 in 2009 and $205.34 last year. The average local transportation expenditures were $61.03 per trip, up significantly from $0.86 in 2007, $29.46 in 2008, $41.23 in 2009, and $34.27 last year.

---

* 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)



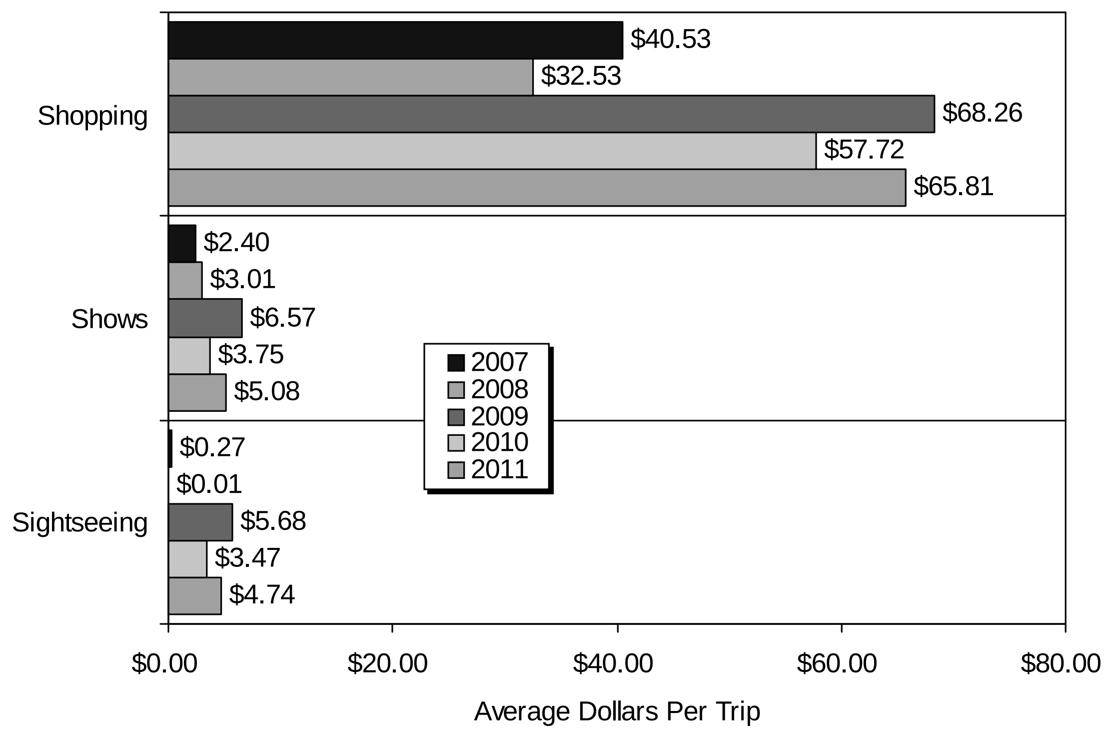
Among visitors who indicated they spent money in these categories, average food and drink expenditures in 2011 were $185.30 per trip, down significantly from $205.15 in 2009 and $205.34 in 2010 (Figure 51). Average local transportation expenditures were $122.48 per trip, down significantly from $189.03 in 2008 and $147.06 in 2009.

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

	2007	2008	2009	2010	2011
Food and drink					
Base size	(1197)	(1199)	(1199)	(1200)	(1200)
Proportion of total	99.8%	99.9%	99.9%	100%	100%
Local transportation					
Base size	(13)	(187)	(340)	(307)	(598)
Proportion of total	1%	16%	28%	26%	50%

* 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)

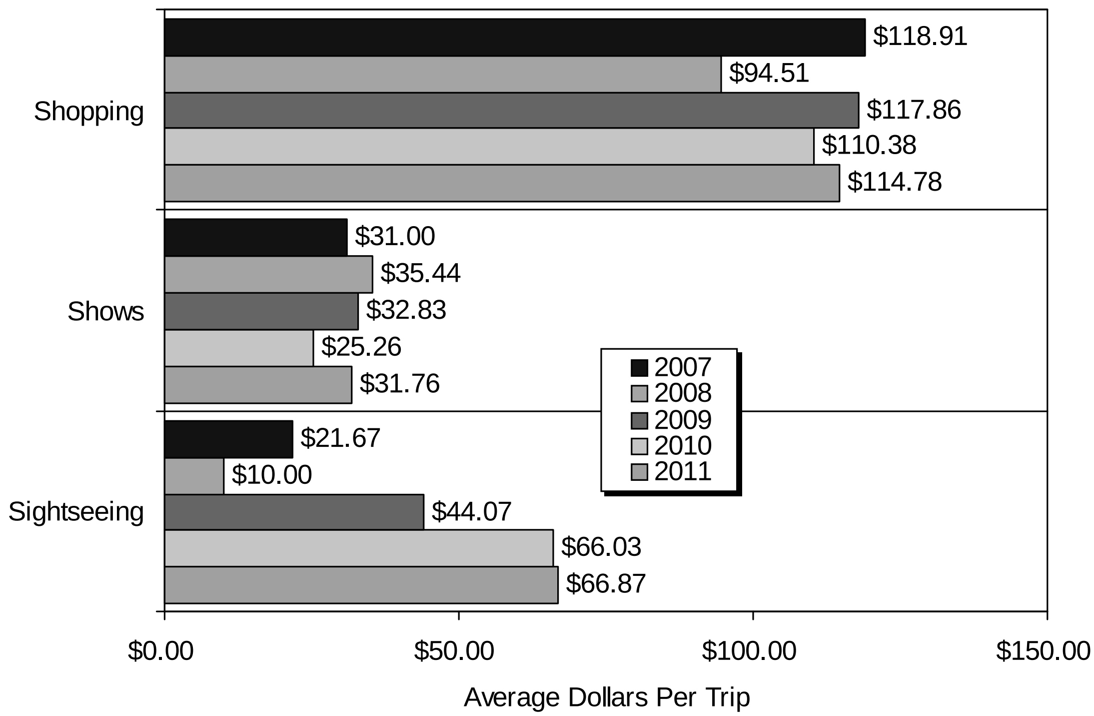


We asked all visitors about the amount of money they spent on shopping, shows, and sightseeing during their visit to Laughlin. Figure 52 shows these average expenditures *including visitors who said they spent nothing in each category*. The average total spent on shopping in 2011 was $65.81, up from $40.53 in 2007, $32.53 in 2008, and $57.72 last year. An average of $5.08 was spent on shows (up from $2.40 in 2007, $3.01 in 2008, and $3.75 last year), and an average of $4.74 was spent on sightseeing (up from $0.27 in 2007 and $0.01 in 2008).

---

* 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 2011 was $114.78, up from $94.51 in 2008 (Figure 53). The average spent on shows was $31.76, up significantly from $25.26 last year. The average spent on sightseeing was $66.87, up significantly from $21.67 in 2007 and $44.07 in 2009.

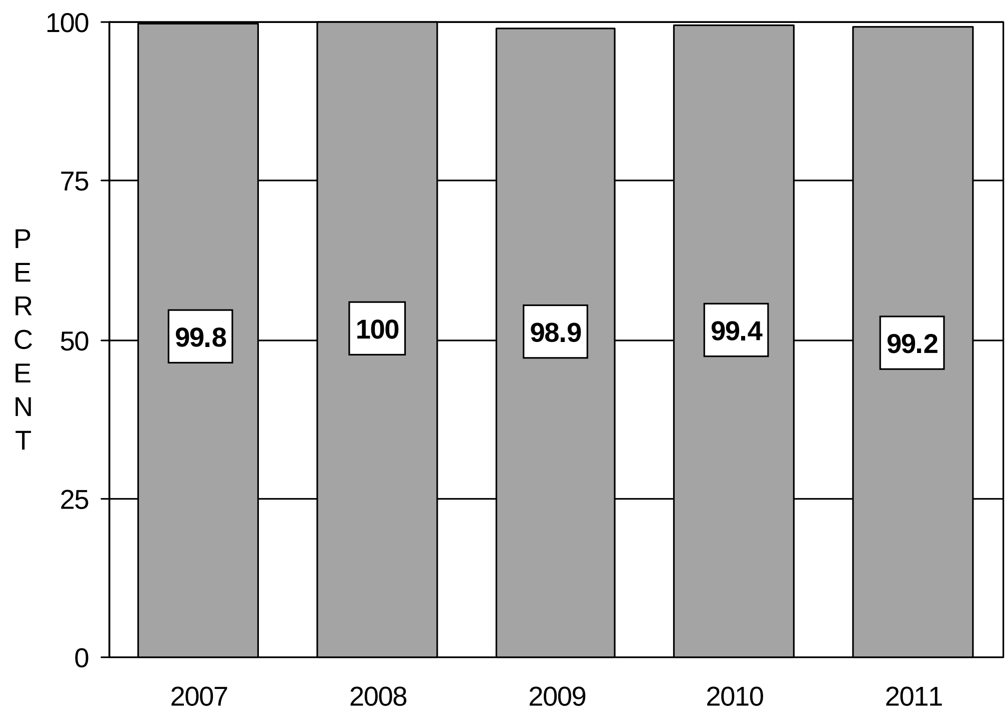
Percentages of visitors who spent money in each category are shown in the following table:

	2007	2008	2009	2010	2011
Shopping					
Base size	(409)	(413)	(695)	(628)	(688)
Proportion of total	34%	34%	58%	52%	57%
Shows					
Base size	(93)	(102)	(240)	(178)	(192)
Proportion of total	8%	9%	20%	15%	16%
Sightseeing					
Base size	(15)	(1)	(165)	(63)	(85)
Proportion of total	1%	0.1%	14%	5%	7%

GAMING BEHAVIOR AND BUDGETS

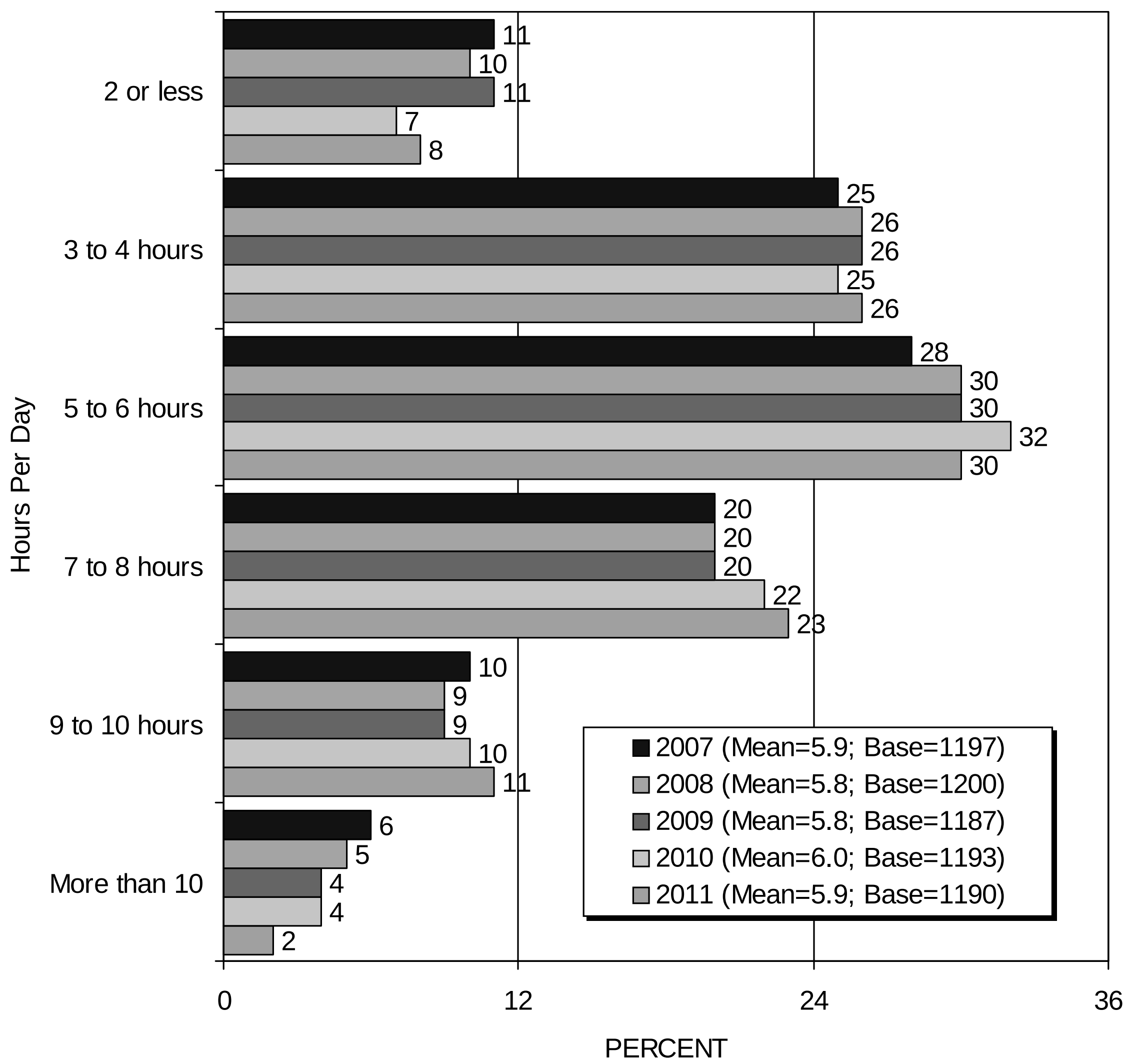
Nearly all Laughlin visitors in the current study (99%) said they gambled during their visit, a decrease from 2008 (when all respondents said they gambled) (Figure 54).

FIGURE 54
Whether Gambled While In Laughlin*



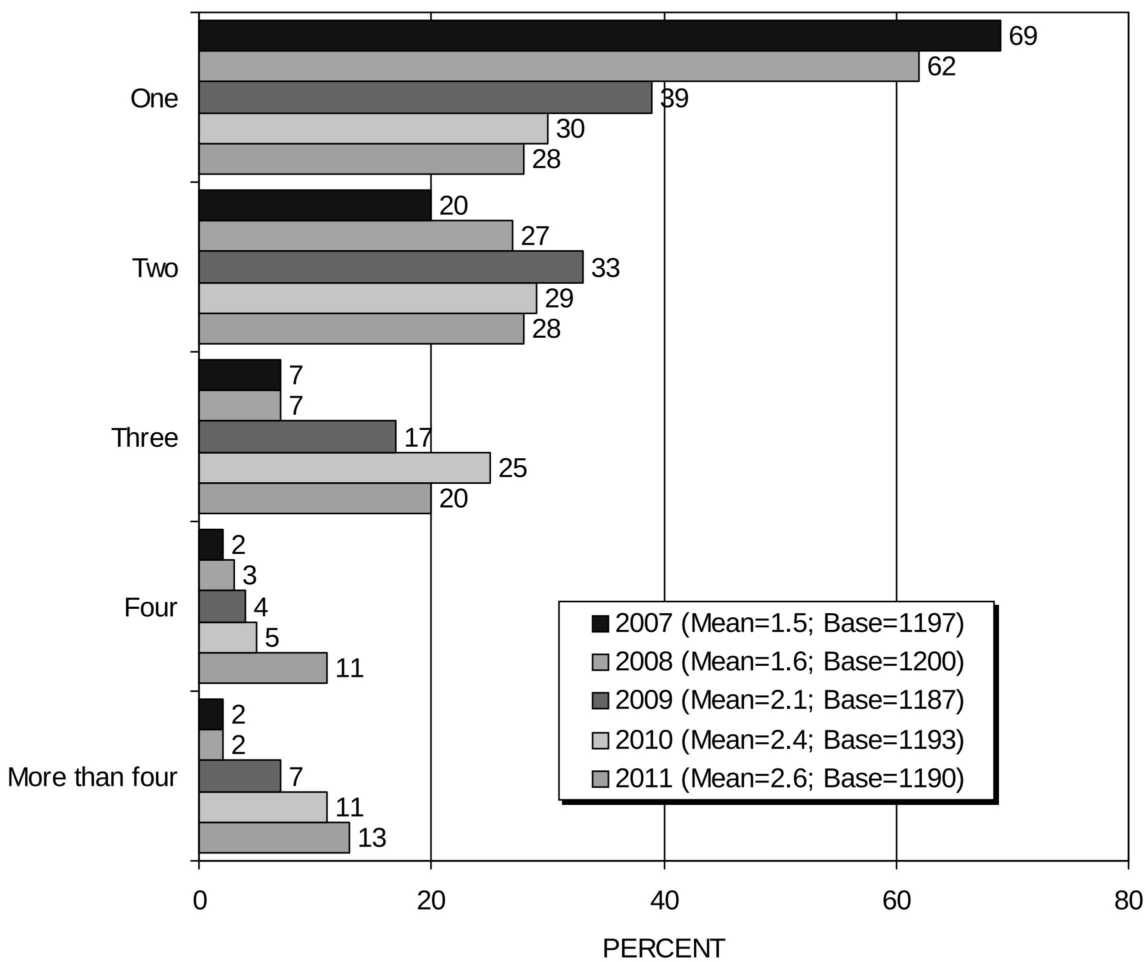
* Only “yes” responses are reported in this chart.

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



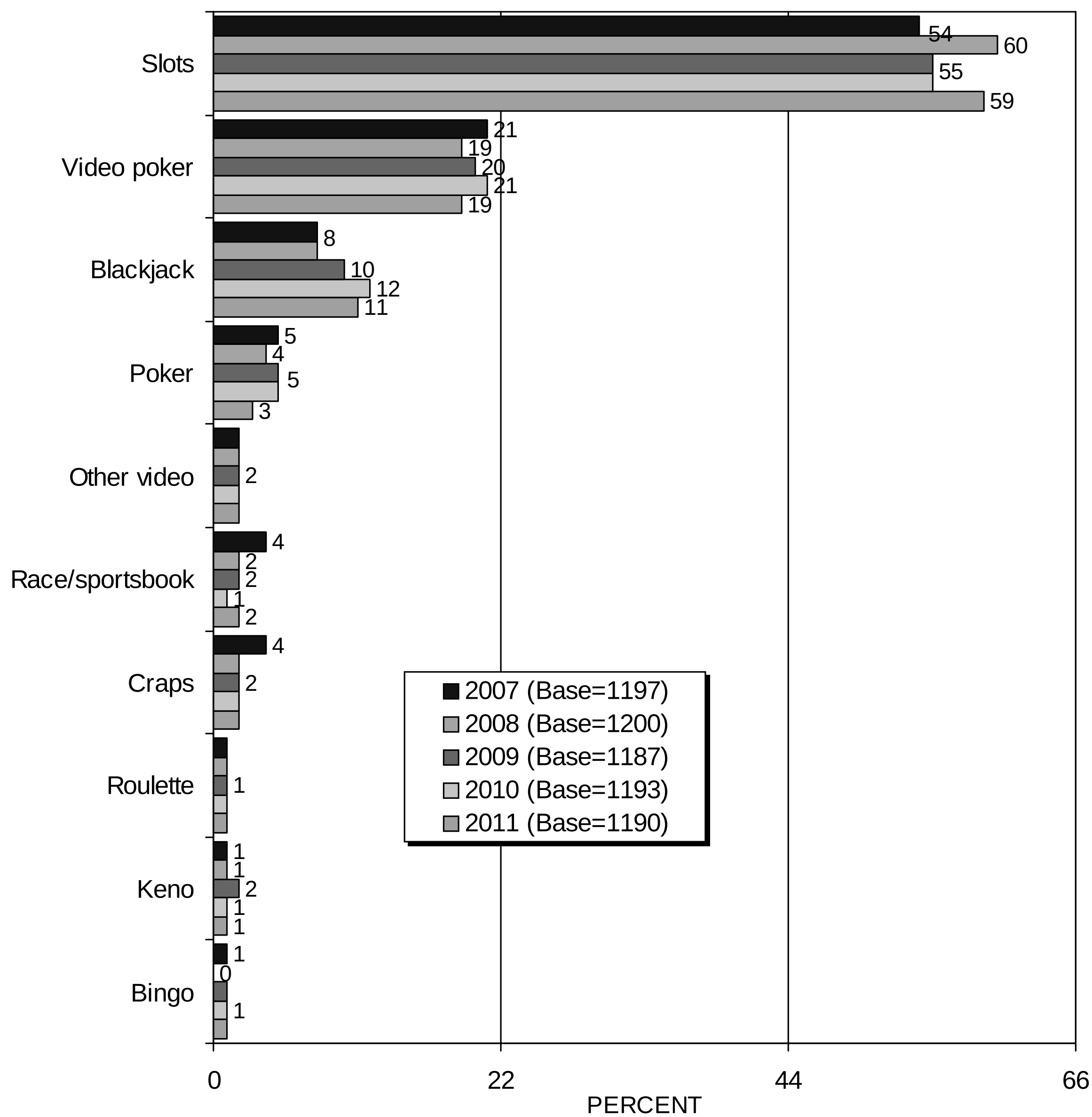
In 2011, Laughlin visitors who gambled said they spent an average of 5.9 hours doing so, not significantly different from past years (Figure 55).

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



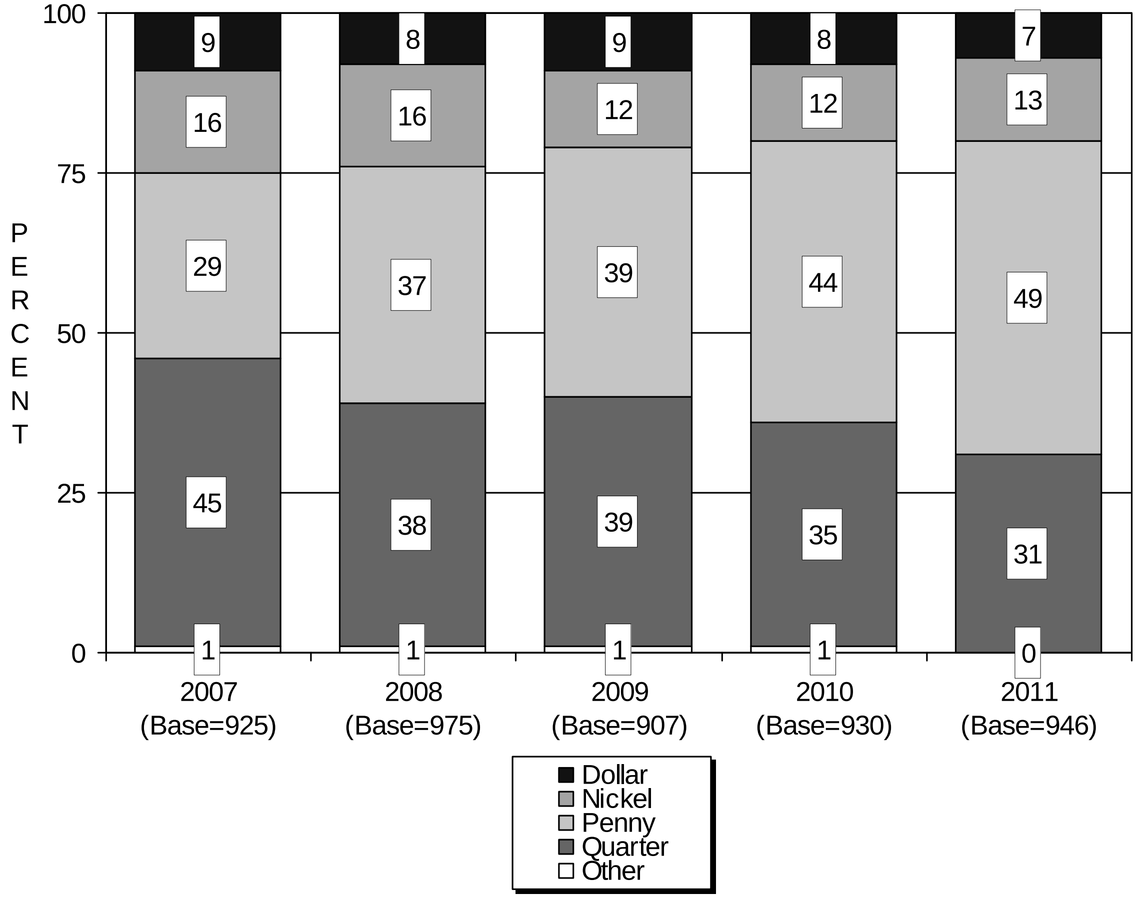
In 2011, gamblers reported gambling at an average of 2.6 casinos during their stay in Laughlin, a significant increase over the past four years (Figure 56).

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



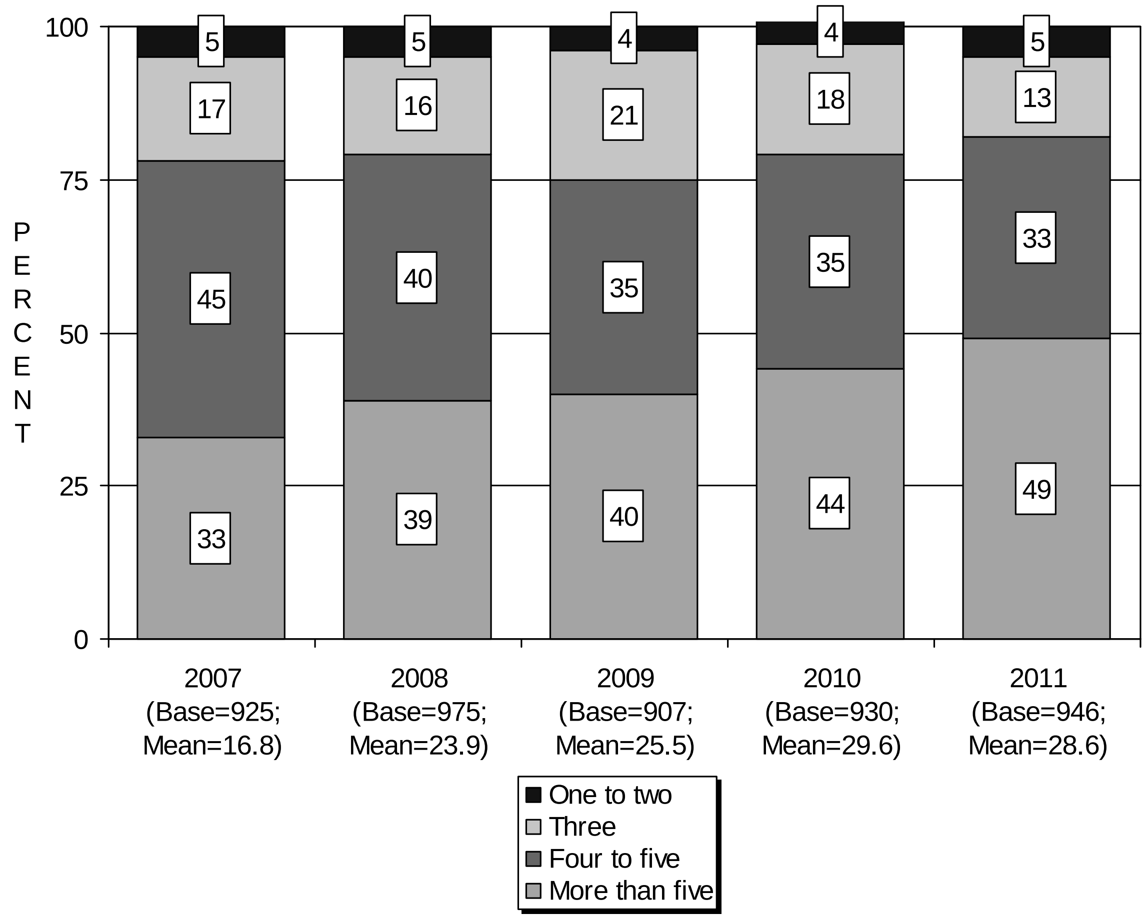
As Figure 57 shows, nearly six in ten (59%) gamblers in 2011 played slot machines most often, up from 54% in 2007 and 55% each in 2009 and 2010. Nearly two in ten (19%) said they played video poker machines most often, followed by 11% who said blackjack (up from 8% each in 2007 and 2008). Three percent (3%) played poker most often, down from 5% each in 2007, 2009, and 2010. Two percent (2%) played craps most often, down significantly from 4% in 2007.

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



Among those who played slot and video machines in 2011 (Figure 58), nearly one-half (49%) played penny machines most often, a significant increase over the past four years. Thirty-one percent (31%) played quarter machines most often (down from 45% in 2007, 38% in 2008, and 39% in 2009). Thirteen percent (13%) played nickel machines most often, while 7% played dollar machines most often (down from 9% each in 2007 and 2009).

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

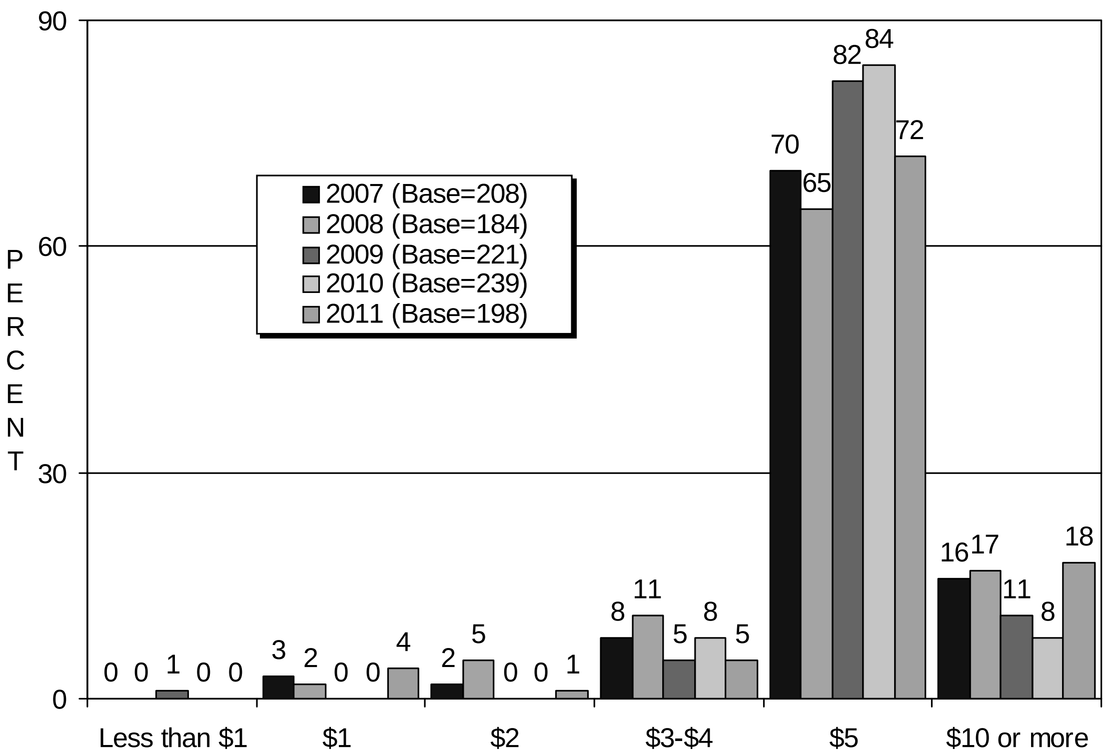


Visitors who played slot and video machines were asked, on average, how many coins or tokens they usually insert before each play on a machine (Figure 59). Over the past several years there has been a dramatic increase in the number of coins/tokens played, likely due to the greatly increased popularity of penny machines. In 2011, the average number of coins or tokens per play was 28.6, not significantly different from last year but up significantly from 16.8 in 2007, 23.9 in 2008, and 25.5 in 2009. Forty-nine percent (49%) reported playing more than five coins/tokens per play, up significantly from 33% in 2007, 39% in 2008, 40% in 2009, and 44% last year.

---

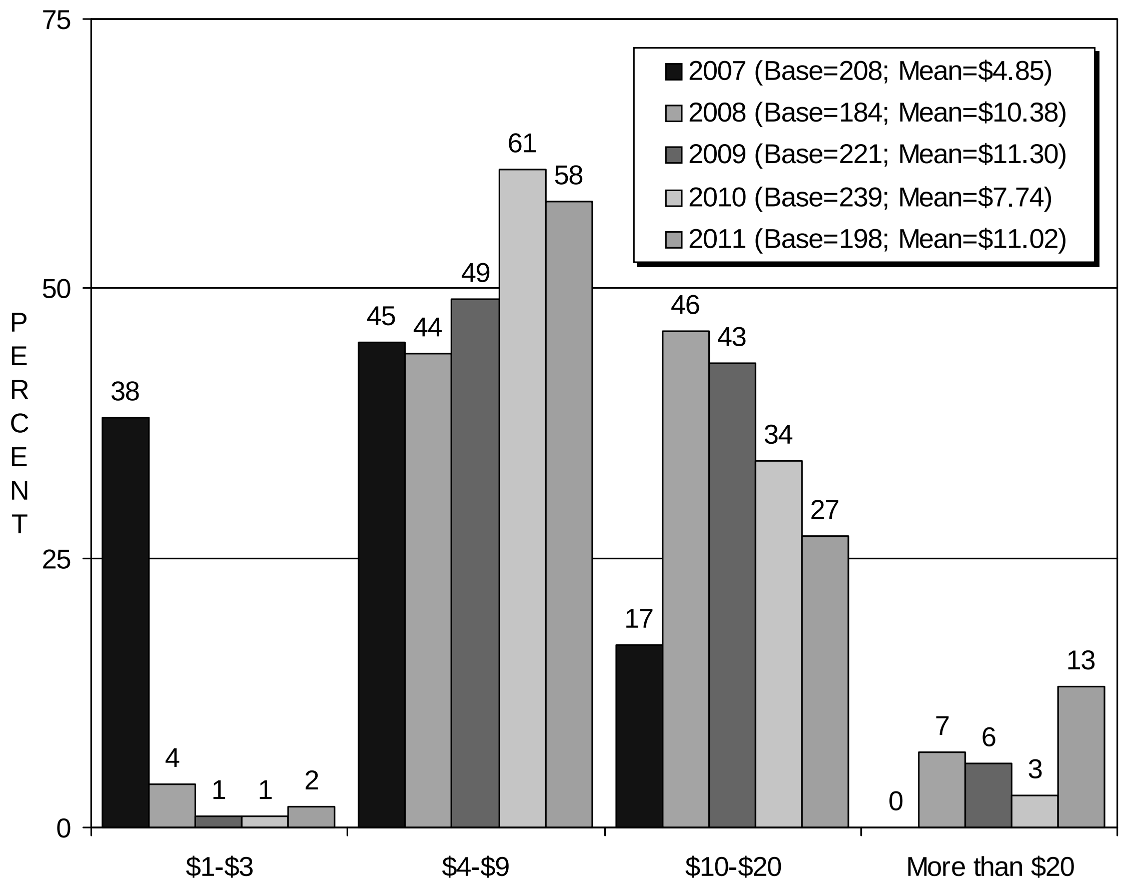
* Percentages may not add to 100% because of rounding.

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



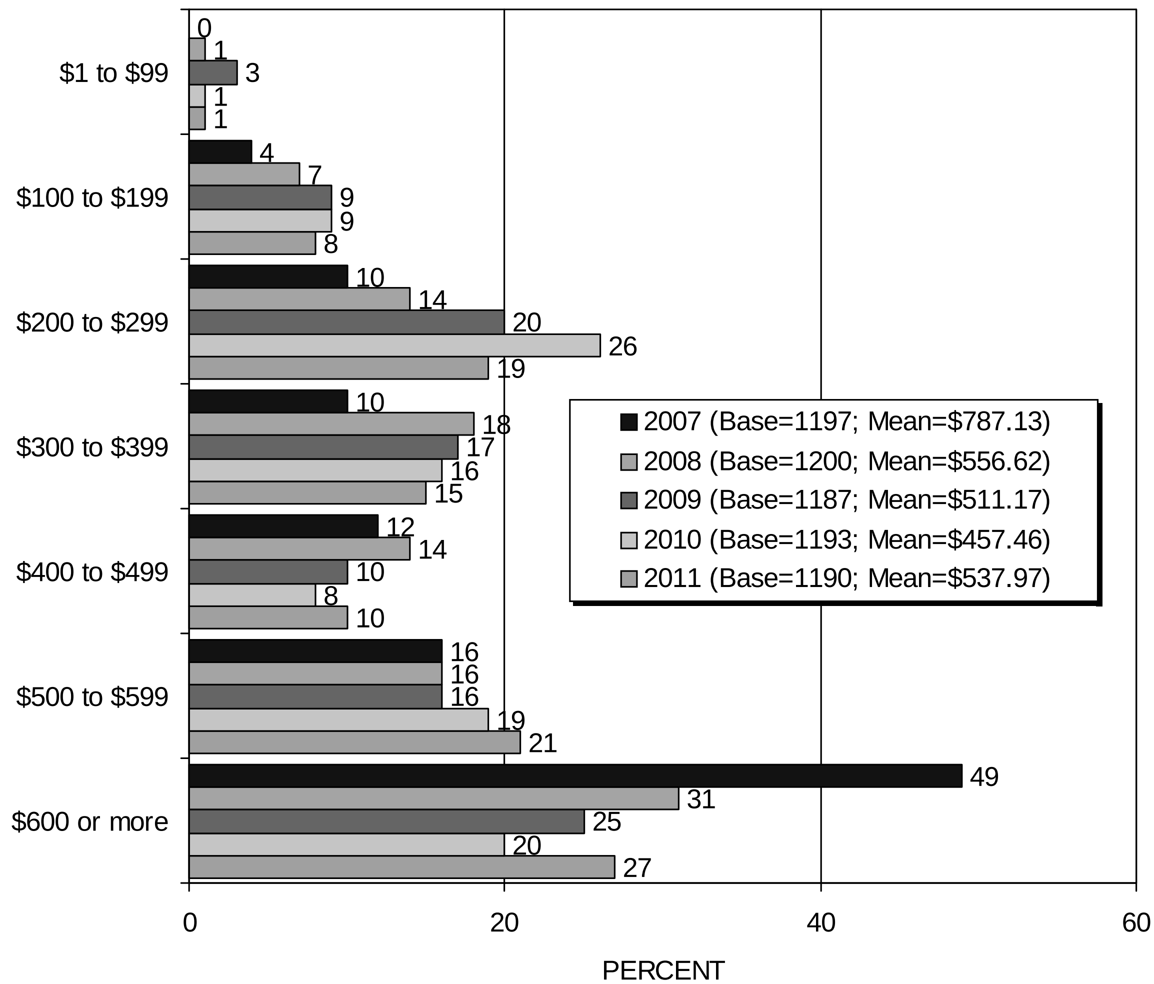
As Figure 60 shows, those who played table games most often in 2011 were most likely to say they played games with a $5 minimum (72%, down significantly from 82% in 2009 and 84% last year). Eighteen percent (18%) played games with a $10 or greater minimum, up significantly from 11% in 2009 and 8% in 2010. Another 5% percent played minimums of $3-$4, down from 11% in 2008.

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



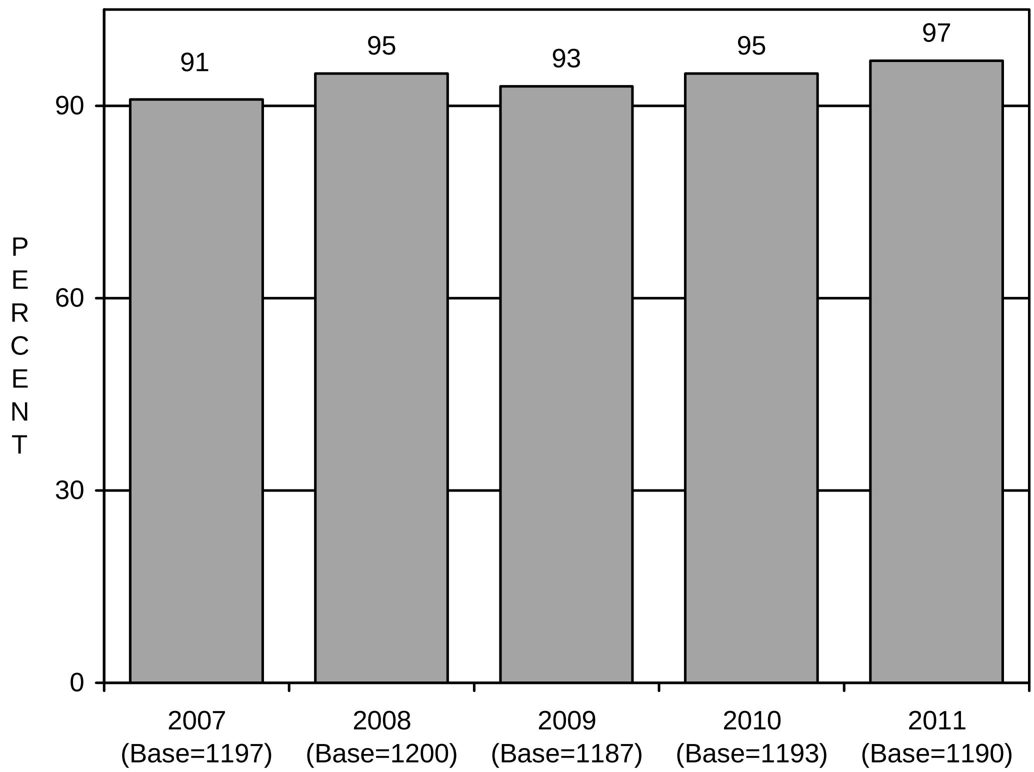
We asked those who played table games about the size of their usual bet (Figure 61). The reported average bet in 2011 was $11.02, up significantly from $4.85 in 2007 and $7.74 in 2010. Nearly six in ten table games players (58%) said their average bet was from $4 to $9, a significant increase from 45% in 2007 and 44% in 2008. Just over one-quarter (27%) said their average bet was from $10 to $20, a significant increase from 17% in 2007 but a significant decrease from 46% in 2008 and 43% in 2009. Thirteen percent (13%) said their average bet was more than $20, up significantly from 2007 – 2010 results. The proportion of table games players who said they bet $1 to $3 was 2%, down significantly from 38% in 2007.

FIGURE 62
Trip Gambling Budget
(Among Those Who Gambled)



The average gambling budget reported by visitors to Laughlin was $537.97 - down significantly from $787.13 in 2007 but up from $457.46 last year (Figure 62).

FIGURE 63
Whether Member Of A Slot/Loyalty Club*

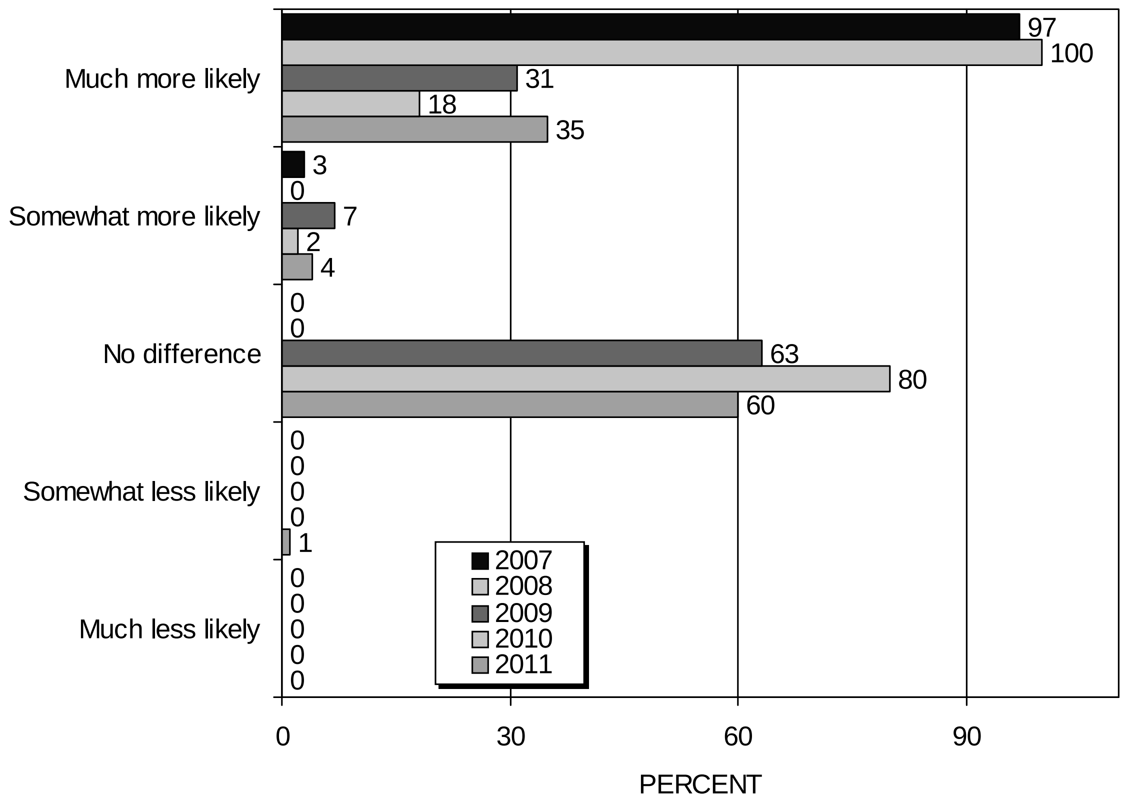


Visitors who gambled during their current trip to Laughlin were asked if they were a member of a slot or loyalty club at any of the Laughlin resorts. In 2011, 97% of gamblers said they were (Figure 63), up significantly from 91% in 2007, 95% each in 2008 and 2010, and 93% in 2009.

---

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

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



All visitors to Laughlin were asked the following:

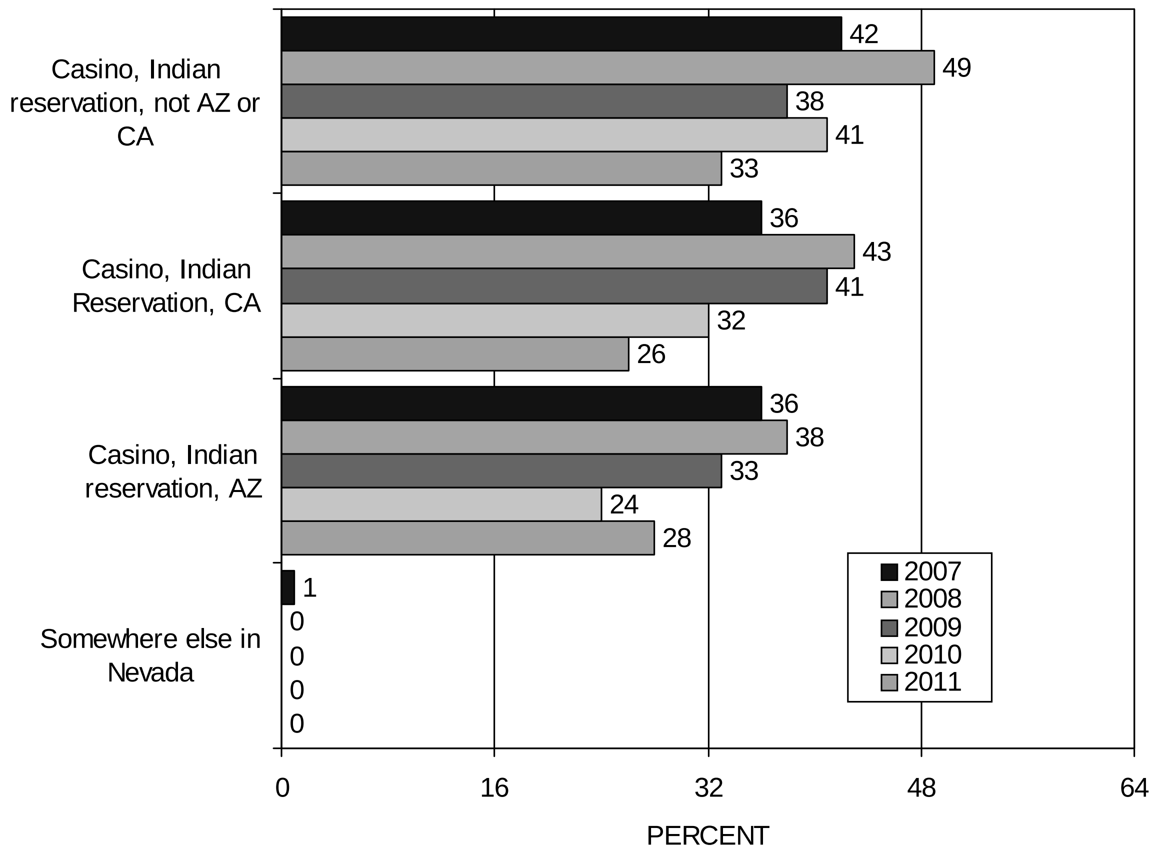
> "Now that there are more places to gamble outside of Laughlin, do you feel you are more likely or less likely to visit Laughlin, or does it not make a difference in your decision to visit Laughlin?"

In 2011, six in ten (60%) said having more places to gamble would make no difference in their decision to visit Laughlin, down significantly from 80% last year. More than one-third (35%) said that having other places to gamble made them *much more* likely to visit Laughlin, down significantly from 97% in 2007 and 100% in 2008, but up from 31% in 2009 and 18% last year, while 4% said it would make them *somewhat more* likely to visit, down from 7% in 2009 but up from less than 1% in 2008 and 2% last year (Figure 64).

---

* Beginning in 2009, this question was refined to address inconsistencies in interpreting and reporting of survey responses. GLS Research believes that the 2009-2011 results most accurately reflect the Laughlin visitor.

FIGURE 65
Where Visitors Gambled Outside Laughlin On Indian Reservations*
(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). Twenty-six percent (26%) reported gambling at an Indian reservation in California, down from past readings. Twenty-eight percent (28%) said they gambled at an Indian reservation in Arizona (down from 36% in 2007, 38% in 2008, and 33% in 2009, but up from 24% last year). One-third (33%) said they gambled at an Indian reservation outside of Arizona or California, down from 2007 – 2010 results.

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

Ninety-six percent (96%) of Laughlin visitors said they were “very satisfied” with their visit to Laughlin in the 2011 survey (Figure 66), up significantly from 92% in 2009 and 93% last year. Four percent (4%) said they were “somewhat satisfied” with their visit, down from 7% in 2009 and 6% in 2010.

FIGURE 66
Satisfaction With Visit

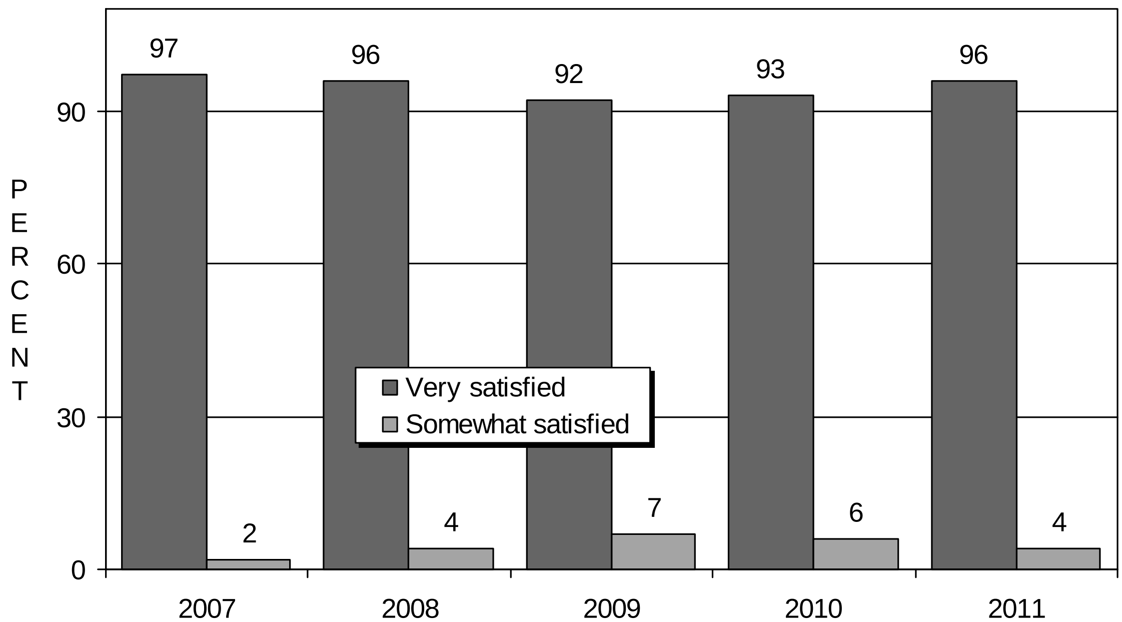
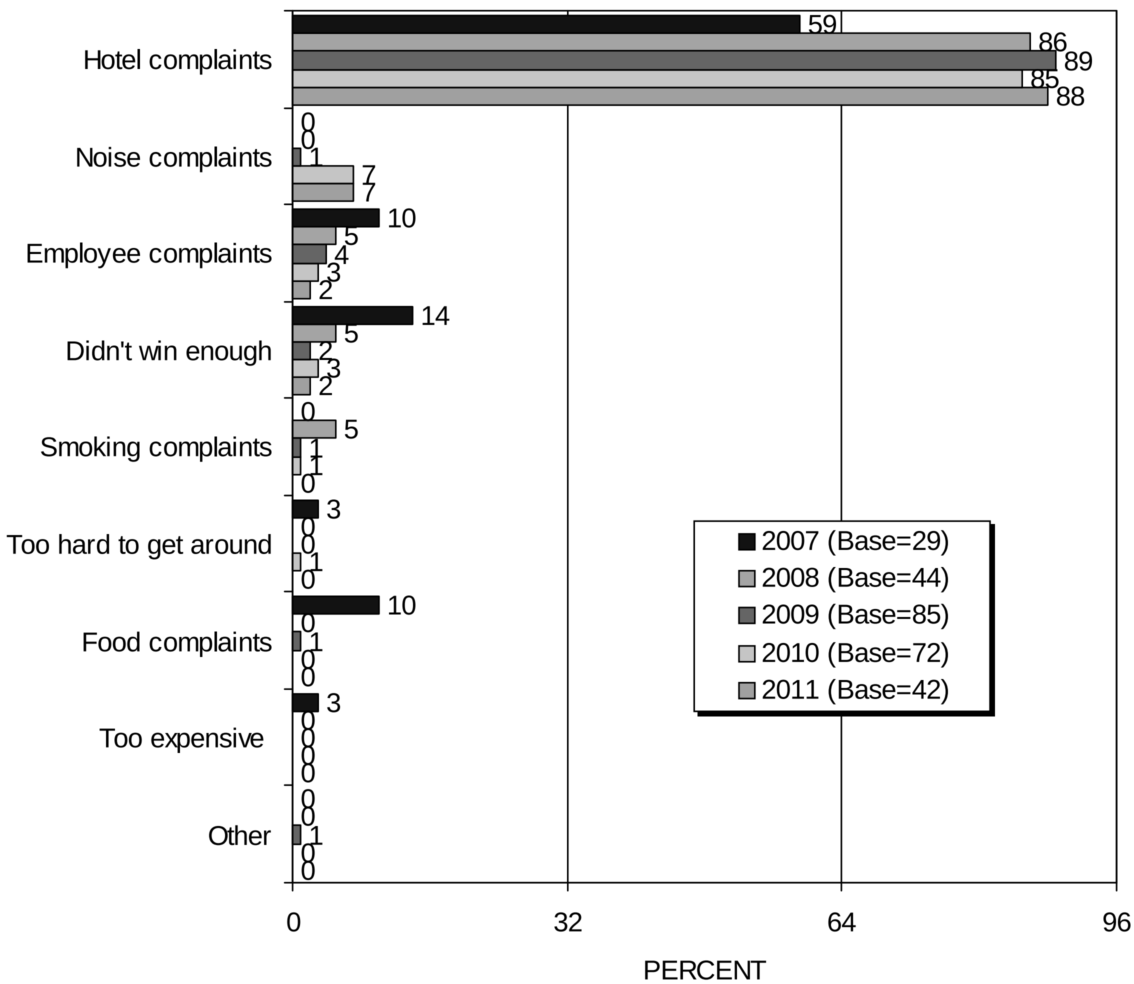
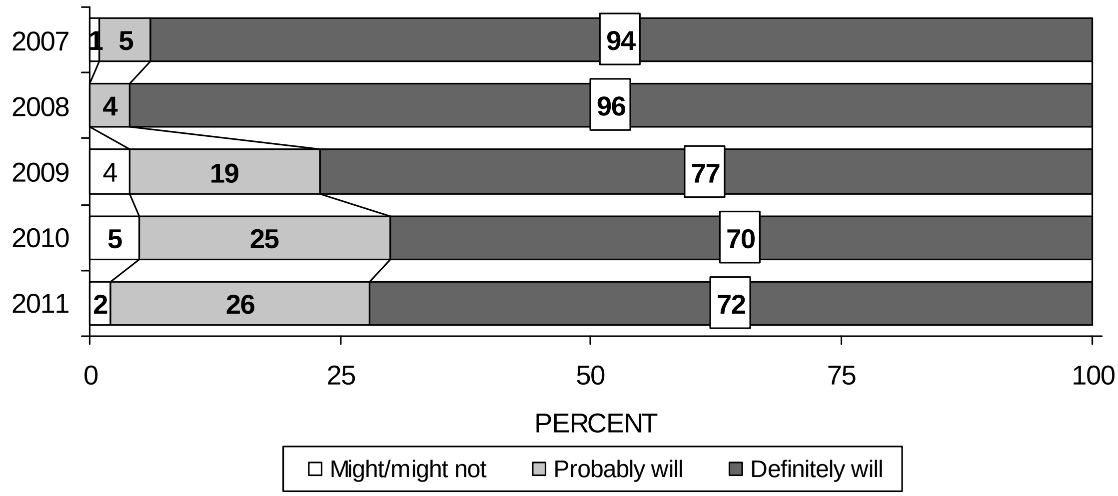


FIGURE 67
Why Not "Very" Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



Those who were "somewhat" satisfied were asked why they were not "very" satisfied (Figure 67). Eight in nine (88%) mentioned complaints with their hotels, up significantly from 59% in 2007. Seven percent (7%) complained about noise, while 2% each complained about employees or mentioned not winning enough money gambling.

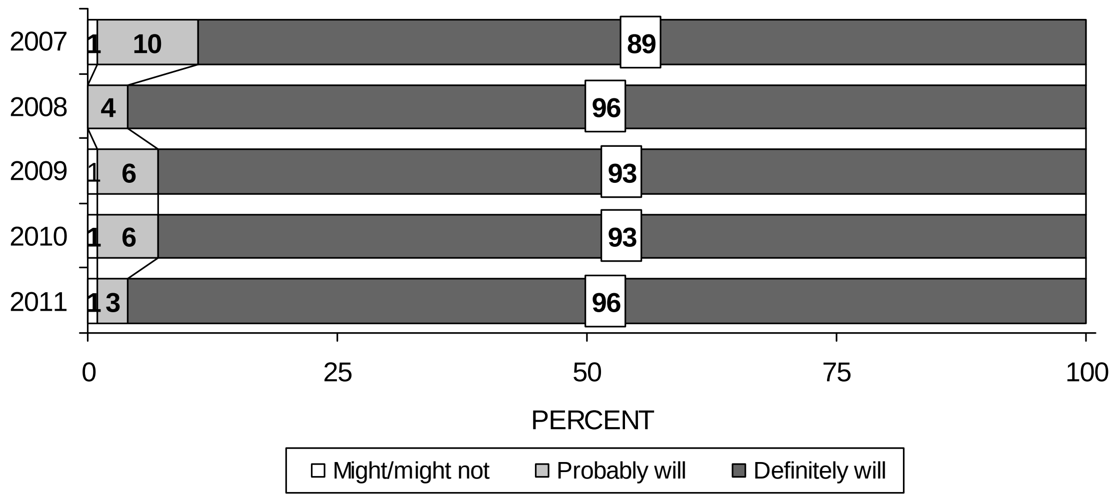
FIGURE 68
Likelihood Of Returning To Laughlin Next Year*



Visitors were asked how likely they are to return to Laughlin next year (Figure 68). More than seven in ten (72%) said they "definitely will" return, down significantly from 94% in 2007, 96% in 2008, and 77% in 2009. One in four (25%) said they "probably" will return to Laughlin in the next year, up from 5% in 2007, 4% in 2008, and 19% in 2009.

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

FIGURE 69
Likelihood Of Recommending Laughlin To Others



Visitors were also asked for the first time in 2007 how likely they are to recommend Laughlin to others (Figure 69). Almost all (96%) said they "definitely will" recommend Laughlin to others, similar to past years.

VISITOR DEMOGRAPHICS

As Figures 70 and 71 show, 2011 visitors were most likely to be married (79%, up from 75% last year) and white (85%, up from 82% last year). One-third of visitors (33%) were from California, while one-quarter (26%) were from Arizona up from 21% in 2009 and 20% in 2010. Seven percent (7%) were foreign visitors, up from 4% in 2007. One-half (49%) of visitors were 65 or older, up from 44% each in 2007 and 2008. The average age was 61.8 years old, up from 60.6 last year. Visitors were more likely to be retired (57%, up from 52% in 2008) than employed (38%, down from 45% in 2008). The largest proportion of visitors have a high school diploma or less (45%). Fifty-two percent (52%) have a household income of less than $60,000, down from 58% last year.

FIGURE 70
VISITOR DEMOGRAPHICS

	2007	2008	2009	2010	2011
GENDER					
Male	51%	51%	50%	50%	51%
Female	49	49	50	50	49
MARITAL STATUS					
Married	78	78	76	75	79
Single	7	9	12	11	8
Separated/divorced	6	5	5	6	5
Widowed	8	7	7	8	8
EMPLOYMENT					
Employed	43	45	42	41	38
Unemployed	0	1	1	1	2
Student	0	0	1	0	1
Retired	54	52	54	53	57
Homemaker	3	3	3	4	2
EDUCATION					
High school or less	44	45	44	43	45
Some college	35	33	32	31	21
College graduate	20	21	24	25	33
Trade/vocational school	1	1	0	1	1
AGE					
21 to 29	2	2	2	3	3
30 to 39	5	5	7	6	5
40 to 49	12	13	11	10	10
50 to 59	21	23	19	18	20
60 to 64	16	14	14	15	14
65 or older	44	44	47	47	49
MEAN	60.9	60.8	60.9	60.6	61.8
BASE	(1200)	(1200)	(1200)	(1200)	(1200)

FIGURE 71
VISITOR DEMOGRAPHICS
(Continued/2)

	2007	2008	2009	2010	2011
ETHNICITY					
White	85%	88%	83%	82%	85%
African-American/Black	1	2	3	3	2
Asian/Asian American	2	1	2	2	1
Hispanic/Latino	10	9	11	12	10
Other	1	0	1	2	1
HOUSEHOLD INCOME					
Less than $20,000	2	2	3	4	3
$20,000 to $39,999	20	16	22	27	17
$40,000 to $59,999	34	33	30	27	31
$60,000 to $79,999	19	22	22	20	24
$80,000 or more	24	26	23	21	23
Not sure/no answer	2	2	1	1	1
VISITOR ORIGIN					
U.S.A.	94	96	94	94	93
Eastern states*	3	2	2	2	1
Southern states†	7	6	6	7	4
Midwestern states‡	13	18	15	14	15
Western states§	70	71	72	71	74
California	32	33	35	35	33
Southern California	30	30	33	32	31
Northern California	2	2	2	3	2
Arizona	23	24	21	20	26
Greater Las Vegas	2	3	3	2	3
Other West	13	12	13	13	13
Foreign	6	4	6	6	7
BASE	(1200)	(1200)	(1200)	(1200)	(1200)

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

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

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

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

APPENDIX:

QUESTIONNAIRE WITH AGGREGATE RESULTS

RESPONDENT ID# ____ ____ ____ ____

INTERVIEW DATE: ___ ___/___ ___/___ ___

INTERVIEW LOCATION CODE ____ ____ ____ ____

TIME STARTED (USE 24-HOUR CLOCK)

____ ____:____ ____

TIME ENDED (USE 24-HOUR CLOCK)

____ ____:____ ____

INTERVIEW LENGTH ____ ____ MIN.

INTERVIEWER ID # ___ ___

RESPONDENT GENDER (BY OBSERVATION)

MALE............................51%

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

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

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

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

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

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

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

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

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

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

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

10.0 MEAN (ALL VISITORS)
11.6 MEAN (REPEAT VISITORS) (N=1018)

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

2.5 MEAN (ALL VISITORS)
2.8 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=1018)

NO 69

NOT SURE/DK 0

REFUSED/NA 0

A5. Thinking back to your *FIRST trip to Laughlin*, what was your primary reason for visiting? **(ASK AS OPEN END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.)** (N=1018)

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW 2%

TO ATTEND A CORPORATE MEETING 0

VACATION/PLEASURE 45

TO GAMBLE 18

VISIT FRIENDS/RELATIVES 20

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

TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT 0

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

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

JUST PASSING THROUGH 9

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....................55
TO GAMBLE 27
VISIT FRIENDS/RELATIVES............12
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT....................0
OTHER BUSINESS PURPOSES 1
WATER-BASED RECREATION 1
JUST PASSING THROUGH...............0
SOME OTHER REASON....................2
NOT SURE/DK....................................0
REFUSED/NA 0

INTERVIEWER:
CONTINUE WITH A8.

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

YES 14%
NO 87
NOT SURE/DK................................... 0
REFUSED/NA 0

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

Air... 13%
Bus
(IF "YES" ASK, "Do you mean...":)
Regularly scheduled bus service like Greyhound 1
Or a chartered or escorted bus service or bus tour 4
Truck 2
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 3%
1-3 DAYS BEFORE............................ 8
4-6 DAYS BEFORE............................ 3
7-14 DAYS BEFORE........................ 25
15-30 DAYS BEFORE...................... 24
31-60 DAYS BEFORE...................... 17
61-90 DAYS BEFORE...................... 14
MORE THAN 90 DAYS BEFORE 5
NOT SURE/DK 0
REFUSED/NA.................................... 0

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

YES 0.4%	**SKIP TO B4**
NO 99.6	**ASK B3a**
NOT SURE/DK..... 0 REFUSED/NA 0	**SKIP TO B4a**

B3a. What is the MAIN reason you did not use a travel agent to help you plan your trip? **(ACCEPT ONLY ONE RESPONSE.)** (N=1195)

CALLED 800# 59%
GOT INVITE FROM HOTEL/CASINO ... 17
USED THE INTERNET 14
PREFER TO MAKE MY OWN PLANS 3
BUSINESS/COMPANY MADE PLANS.... 3
LAST MINUTE DECISION/NO TIME 1
ALL OTHER MENTIONS 4

AFTER ASKING B3a, SKIP TO B4a

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

(ASK ONLY OF THOSE WHO SAID "YES" IN B3.)
B4. Did the travel agent... **(READ LIST)**
(N=5)

	YES	NO	DON'T KNOW	RE-FUSED
Influence your decision to visit Laughlin?	60%	40%	0%	0%
Influence your choice of accommodations?.................	80	20	0	0
"Book" your accommodations?	100	0	0	0
"Book" your transportation?	80	20	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* BOOK ACCOMMODATIONS OR TRANSPORTATION THROUGH A TRAVEL AGENT *OR* THROUGH THE INTERNET — BUT NOT BOTH. HOWEVER, THEY CAN BE INFLUENCED BY BOTH A TRAVEL AGENT AND THE INTERNET.

B4b. **(ASK OF RESPONDENTS WHO SAID "YES" IN B4a.)**
Did you use the Internet to... **(READ LIST)**
(N=175)

	YES	NO	DON'T KNOW	RE-FUSED
"Book" your accommodations?	98%	2%	0%	0%
"Book" your transportation?	11	89	0	6

B4c. Did you find information on the Internet that... **(READ LIST)**
(N=175)

	YES	NO	DON'T KNOW	RE-FUSED
Influenced your decision to visit Laughlin?	21%	79%	0%	6%
Influenced your choice of accommodations?...............	98	2	0	6

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

AMONG ALL RESPONDENTS:	Before Leaving Home	While En Route To Laughlin	After Arrival	DOES NOT APPLY	DON'T KNOW	RE-FUSED
				DO *NOT* READ THESE RESPONSE CODES		
a. Where you would stay?	95%	1%	3%	1%	0%	0%
b. Where you would gamble?	86	0	13	1	0	0
c. Which shows you would see?..	9	0	36	54	1	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?	96%	1%	3%	0%	(N=1184)
b. Where you would gamble?	87	0	13	0	(N=1190)
c. Which shows you would see?..	20	0	79	1	(N=549)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

FROM PERMANENT RESIDENCE 94%	**SKIP TO C1**
FROM ANOTHER LOCATION 6	**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=76)

LAS VEGAS 65%	**ASK B7a**
ARIZONA ....29 CALIFORNIA...........................1 OTHER...................................5 NOT SURE/DK........................0 REFUSED/NA 0	**SKIP TO C1**

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

Air... 67% (N=49)

Automobile, truck, RV, bus 33

C1. On this trip to Laughlin, where did you lodge? **(ASK AS OPEN END. ACCEPT ONLY *ONE* RESPONSE. CIRCLE CODE NUMBER. <u>INTERVIEWER</u>: 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).)**

<u>TYPE OF LODGING</u>

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

<u>LOCATION OF LODGING</u>

LAUGHLIN	96%
BULLHEAD CITY	0
DAYTRIP/LOCATION COULD NOT BE DETERMINED	5

<u>TYPE OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=1192)

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

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

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

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

C1a. Which of the following **[SHOW CARD]** best describes how you, or someone in your party, booked your accommodations in Laughlin? **(ACCEPT ONLY ONE RESPONSE.)** (N=1180)

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)........0
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 4
f. The trip was a gift, prize, or incentive, so the accommodations were booked for you 2
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=171)

EXPEDIA.COM 20%
TRAVEL.COM 4
ORBITZ 2
PRICELINE.COM 2
CHEAPTICKETS 2
TRAVELOCITY 4
YAHOO 6
HOTEL WEB SITE (ANY).. 52
OTHER... 8
NOT SURE/DK.................................. 1
REFUSED/NA 0

C2. How far in advance did you make your reservations for your (hotel room/motel room/RV park space) for this trip to Laughlin? **(ASK AS OPEN END.)** (N=1180)

SAME DAY 4%
1-3 DAYS BEFORE............ 8
4-6 DAYS BEFORE............ 3
7-14 DAYS BEFORE........ 26
15-30 DAYS BEFORE...... 25
31-60 DAYS BEFORE...... 18
61-90 DAYS BEFORE...... 13
MORE THAN 90 DAYS BEFORE 3
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=1159)

ONE 10%
TWO 82
THREE................................5
FOUR OR MORE 3
REFUSED/NA.....................0
<u>2.0</u> 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=1159)

HOTEL/AIRLINE PACKAGE DEAL..........11% HOTEL/AMENITIES PACKAGE DEAL...........0 TOUR/ TRAVEL GROUP 1	**ASK C6**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE.............36 REGULAR FULL-PRICE ROOM RATE......2	**SKIP TO C8**
CASINO COMPLIMENTARY......48	**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=149)

Less than $50..................1%
$50 - $99 7
$100 - $149 26
$150 OR MORE 65
NOT SURE/REFUSED ...0
$232.92 MEAN
$239.00 MEDIAN

C6a. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=149)

OUTDOOR BILLBOARD 0%
BROCHURE 1
E-MAIL OFFER.................................. 1
INTERNET AD (POP-UP OR BANNER AD) 1
OFFER RECEIVED IN THE MAIL.... 24
NEWSPAPER.................................... 5
RADIO 0
RESERVATION AGENT/ CALL CENTER 29
TELEVISION...................................... 0
TRAVEL AGENT 2
ANY WEB SITE 8
WORD-OF-MOUTH.......................... 28
OTHER 1
NOT SURE/DK 0
REFUSED/NA.................................... 0

SKIP TO C9

C8. **(ASK ONLY OF NON-PACKAGE VISITORS)** By the time you leave Laughlin, how much will you have spent, *on average per night*, on your hotel or motel room? **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)** (N=451)

Less than $25 .... 28%
$25 - $49............................ 45
$50 OR MORE................... 27
NOT SURE/NO ANSWER... 0
$39.20 MEAN
$35.00 MEDIAN

C8a. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=451)

OUTDOOR BILLBOARD..................0%
BROCHURE.....................................0
E-MAIL OFFER 5
INTERNET AD (POP-UP OR BANNER AD)............................15
OFFER RECEIVED IN THE MAIL ..19
NEWSPAPER 0
RADIO 1
RESERVATION AGENT/ CALL CENTER................................45
TRAVEL AGENT 0
ANY WEB SITE...............................10
WORD-OF-MOUTH 4
OTHER 0
NOT SURE/DK.................................0
REFUSED/NA 0

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

(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)

1....................................10%
2....................................85
3......................................4
4 OR MORE 1
2.0 MEAN
2.0 MEDIAN

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

YES 5%
NO 95
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 5
2 27
3 32
4 22
5 OR MORE........................... 12
3.2 MEAN
3.0 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 5
3 27
4 32
5 22
6 OR MORE........................... 12
4.2 MEAN
4.0 MEDIAN

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

SUNDAY................................ 11%
MONDAY 10
TUESDAY.............................. 13
WEDNESDAY........................ 17
THURSDAY 17
FRIDAY................................. 20
SATURDAY 12
REFUSED/NA.......................... 0

D1. Have you gambled during this visit to Laughlin?

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

D2. On average, how many hours *PER DAY* did you spend gambling? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?") (N=1190)

1 TO 2 HOURS 8%
3 TO 4 HOURS 26
5 TO 6 HOURS 30
7 TO 8 HOURS 23
9 TO 10 HOURS 11
MORE THAN 10 HOURS........... 2
5.9 MEAN
6.0 MEDIAN

D3. How many different casinos have you gambled at during your stay in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)** (N=1190)

1... 28%
2... 28
3... 20
4... 11
5 TO 6....................................... 12
MORE THAN 6........................... 0
2.6 MEAN
2.0 MEDIAN

D4. Which type of casino game do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=1190)

SLOT MACHINES ..... 59% VIDEO POKER.......... 19 OTHER VIDEO MACHINES (21, KENO, ETC.) 2	**ASK D5**
BACCARAT .... 0 BIG 6........................... 0	**SKIP TO D7**
BINGO 1	**SKIP TO D10**
BLACKJACK............. 11 CARIBBEAN STUD POKER .... 0 CRAPS 2	**SKIP TO D7**
KENO.......................... 1	**SKIP TO D10**
POKER 3	**SKIP TO D7**
RACE/SPORTS-BOOK 2	**SKIP TO D10**
ROULETTE................. 1	**SKIP TO D7**
OTHER .... 0 NOT SURE/DK .... 0 REFUSED/NA............. 0	**SKIP TO D10**

★ ★ ★ ★ ★ ★ ★ ★ ★

D5. Which denomination machine do you play *MOST OFTEN*. **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=946)

PENNY 49%
NICKEL.............................13
DIME 0
QUARTER 31
HALF DOLLAR 0
DOLLAR 7
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=946)

1-2 ....5%
3..13
4-5 33
6 OR MORE 49
REFUSED/NO ANSWER.....0
28.6 MEAN
5.0 MEDIAN

SKIP TO D10

★ ★ ★ ★ ★ ★ ★ ★ ★

D7. What table minimum do you play *MOST OFTEN*. **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=198)

LESS THAN $1.00 ....0%
$1.00....................................4
$2.00....................................1
$3.00-$4.00 5
$5.00..................................72
$10.00 10
$25.00 6
$50.00 2
OVER $50.00 1
OTHER.................................1
NOT SURE/DK.....................0
REFUSED/NA 0

CONTINUE WITH D8

D8. What is your average bet? **(WRITE AMOUNT IN BLANKS BELOW.)** (N=198)

$1 - $3 ....2%
$4 - $9 58
$10 - $20 27
OVER $20 13
DON'T KNOW/NA 0
$11.02 MEAN
$5.00 MEDIAN

INTERVIEWER:
THERE IS NO QUESTION D9

D10. **(ASK OF ALL GAMBLERS.)** Not including travel, food, or lodging, how much money did you budget for gambling on this trip? Include only your own, personal, gambling budget and not the gambling budgets of others who may have been with you. **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)** (N=1190)

$1 - $99...................................1%
$100 - $199.............................8
$200 - $299............................19
$300 - $399............................15
$400 - $499............................10
$500 - $599............................21
$600 OR MORE.....................27
NOT SURE/NO ANSWER.......0
$537.97 MEAN
$400.00 MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=1190)

YES.......................................97%
NO 3
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........ 26
B. At a casino on an Indian reservation in Arizona........... 28
C. At a casino on an Indian reservation outside Arizona or California............. 33
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................. 35%
SOMEWHAT MORE LIKELY.........4
NO DIFFERENCE........................60
SOMEWHAT LESS LIKELY...........1
MUCH LESS LIKELY.....................0
NOT SURE/DK...............................0
REFUSED/NA................................0

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

YES 69%
NO 31
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...................... 17%	**ASK B13**
NO .... 83 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=203)

A. Downtown Las Vegas (that is, the area on or near Fremont Street)?......... 69%
B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?......................... 88

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......................12%	**ASK B15**
NO .... 88 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=147)

Hoover Dam.............................. 33%
Lake Mead................................ 10
Lake Havasu/ Colorado River 31
Lake Mojave/ Davis Dam 31
Grand Canyon 5
Bryce Canyon 0
Zion National Park 1
Oatman, Arizona........................ 46
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.)**

$185.30 MEAN (INCLUDING $0)
$185.30 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.)**

$61.03 MEAN (INCLUDING $0)
$122.48 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) .... $65.81 MEAN (INCLUDING $0)
$114.78 MEAN (EXCLUDING $0)

B. Shows/entertainment (not including gambling) .... $5.08 MEAN (INCLUDING $0)
$31.76 MEAN (EXCLUDING $0)

C. Sightseeing .... $4.74 MEAN (INCLUDING $0)
$66.87 MEAN (EXCLUDING $0)

D. Other .... $2.59 MEAN (INCLUDING $0)
$88.89 MEAN (EXCLUDING $0)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

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

Very satisfied.................... 96%	**SKIP TO G1 ON PAGE 13**
Somewhat satisfied 4	**ASK F2**
Somewhat dissatisfied .... 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=42)

HOTEL COMPLAINTS......................... 88%
NOISE COMPLAINTS............................ 7
EMPLOYEE COMPLAINTS.................... 2
DIDN'T WIN ENOUGH MONEY 2

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=9)

HOTEL COMPLAINTS......................... 67%
DIDN'T WIN ENOUGH MONEY 33

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

Definitely will................................72%
Probably will 25
Might/might not..............................2
Probably will not 0
Definitely will not............................0
NOT SURE/NO ANSWER 0

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

Definitely will recommend............96%
Probably will recommend 3
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 38%	**ASK G2**
Unemployed ....2 Student ....1 Retired ....57 Homemaker 2	**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=460)

SALES/CLERICAL WORKERS .. 29%

SERVICE WORKERS 22

MANAGERS/OFFICIALS/ PROPRIETORS 19

PROFESSIONAL/TECHNICAL ... 19

CRAFT WORKERS/FOREMEN.. 10

OTHER 1

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 2%

HIGH SCHOOL DIPLOMA (FINISHED GRADE 12) 43

SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 21

GRADUATED COLLEGE 30

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

TECHNICAL, VOCATIONAL, OR TRADE SCHOOL 1

REFUSED/NA 0

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

Married 79%

Single 8

Separated or divorced 5

Widowed 8

REFUSED/NA 0

G5. What country do you live in?

USA 93%	**ASK G6**
FOREIGN 7	**SKIP TO G7**
REFUSED/NA 0	**SKIP TO G7**

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

EAST 1%

SOUTH 4

MIDWEST 15

WEST 74

- CALIFORNIA 33
- ARIZONA 26
- OTHER WEST 16

FOREIGN VISITORS 7

NO ZIP CODE GIVEN 0

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

WHITE 85%

BLACK OR AFRICAN AMERICAN 2

ASIAN OR ASIAN AMERICAN 1

HISPANIC/LATINO 10

NATIVE AMERICAN 1

MIXED RACE 0

OTHER 0

NOT SURE/DON'T KNOW 0

REFUSED/NO ANSWER 0

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

61.8 MEAN
64.0 MEDIAN

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

21 to 29 .... 3%

30 to 39 5

40 to 49 10

50 to 59 20

60 to 64 14

65 and older 49

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 7
C. $30,000 to $39,999 10
D. $40,000 to $49,999 16
E. $50,000 to $59,999 15
F. $60,000 to $69,999 13
G. $70,000 to $79,999 11
H. $80,000 to $89,999 8
I. $90,000 to $99,999 4
J. $100,000 to $149,999 11
K. $150,000 or more 1
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

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

For additional research publications and statistics, visit LVCVA.com.