LAUGHLIN
VISITOR PROFILE STUDY
2013

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 2013

Annual Report

January 1, 2013 to December 31, 2013

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

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

TABLE OF CONTENTS

TABLE OF FIGURES

Page

TABLE OF FIGURES
(continued/2)

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, 2013 to December 31, 2013. 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 lower than 19% in 2009. Among first-time visitors, 49% said their primary reason for visiting Laughlin was vacation or pleasure (down significantly from 62% in 2010 and 75% in 2012), while 6% mentioned gambling (down from 13% in 2009, 12% in 2010, and 14% in 2011). Among repeat visitors, 43% mentioned vacation or pleasure as their primary reason for their current visit (up from 27% in 2009 and 35% in 2010 but down from 56% in 2011 and 73% in 2012), while gambling was cited by 34% (down from 49% in 2009 but up from 29% in 2011 and 20% in 2012). The average number of Laughlin visits among all visitors in the past year was 2.9 (up significantly from 2.3 in 2009 and 2.5 each in 2010 and 2011), while among repeat visitors it was 3.2 (up from 2.6 in 2009 and 2.5 each in 2010 and 2011). The average number of visits among all visitors in the past five years was 10.2, while among repeat visitors it was 11.9.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2009	2010	2011	2012	2013
Proportion of visitors who were first-time visitors	19%	18%	15%	13%	15%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	54%	62%	51%	75%	49%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	13%	12%	14%	7%	6%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	27%	35%	56%	73%	43%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	49%	36%	29%	20%	34%
Average number of visits in past five years (all visitors)	10.2	10.1	10.0	10.5	10.2
Average number of visits in past five years (repeat visitors)	12.3	12.0	11.6	11.9	11.9
Average number of visits in past year (all visitors)	2.3	2.5	2.5	2.9	2.9
Average number of visits in past year (repeat visitors)	2.6	2.8	2.8	3.2	3.2

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (88%, up from 85% in 2010). The vast majority of visitors (94%) arrived in Laughlin directly from their permanent residences (down from 98% last year but up from 89% in 2010). As in the past, most visitors decided where to stay in Laughlin before arriving in Laughlin (96%, up significantly from 95% in 2009). Most visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (96%, up from 2009 – 2012). Of those visitors who saw shows during their visit, 48% decided what shows to see *before* arriving in Laughlin (up significantly from 40% in 2009, 7% in 2010, 20% in 2011, and 35% last year). Sixteen percent (16%) of all Laughlin visitors said they used the Internet to plan their trip (up significantly from 12% in 2010 and 11% in 2012). Thirteen percent (13%) of Laughlin visitors also visited Las Vegas on their current trip, down significantly from 21% in 2009, 20% in 2010, and 17% in 2011. Seven percent (7%) toured other nearby places, down significantly from 16% in 2009, 11% in 2010, 12% in 2011, and 10% in 2012.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2009	2010	2011	2012	2013
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/truck/RV)	86%	85%	87%	88%	88%
Proportion of visitors who traveled to Laughlin by air	14%	15%	13%	12%	12%
Proportion of visitors who traveled to Laughlin from their permanent residence	93%	89%	94%	98%	94%
Proportion of visitors who decided where to stay in Laughlin before arrival	95%	97%	97%	97%	96%
Proportion of visitors who decided where to gamble in Laughlin before arrival	87%	92%	87%	93%	96%
Proportion of visitors who decided which shows to see in Laughlin before arrival	40%	7%	20%	35%	48%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	1%	1%	0.4%	0%	0.1%
Proportion of visitors who used the Internet in planning their trip to Laughlin	15%	12%	15%	11%	16%
Proportion of visitors who have visited Las Vegas in the past five years	71%	71%	69%	67%	65%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	21%	20%	17%	14%	13%
Proportion of visitors who toured nearby places	16%	11%	12%	10%	7%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.0, down significantly from 2.5 in 2009 but up significantly from 1.9 in 2010. Five percent (5%) had people under the age of 21 in their immediate party, down significantly from 7% in 2009 but up significantly from 3% last year. Their stay averaged 3.4 nights and 4.4 days, up from 2009 – 2011 readings. Ninety-seven percent (97%) of visitors who stayed overnight lodged in a hotel or motel, with an average of 2.1 room occupants (up significantly from 2.0 each from 2009 – 2011). Non-package overnight visitors who stayed in a hotel or motel spent an average of $41.30 for their room, significantly higher than the averages of $38.53 in 2009, $38.35 in 2010, and $37.26 last year. Fourteen percent (14%) of visitors who stayed in a hotel or motel paid a package/tour group rate. The average package cost was $240.23, not significantly different from past years. The average food and drink expenditures in 2013 were $134.13 per trip, up significantly from $122.22 last year, but down significantly from 2009 – 2011. The average local transportation expenditures were $71.93 per trip, up significantly from 2009 – 2012. The average total spent on shopping was $66.15, up significantly from $57.72 in 2010. An average of $8.84 was spent on shows (up significantly from 2009 – 2012), and an average of $6.67 was spent on sightseeing (up from $3.47 in 2010).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2009	2010	2011	2012	2013
Average number of adults in immediate party	2.5	1.9	2.0	2.0	2.0
Proportion of visitors with persons under 21 in their immediate party	7%	4%	5%	3%	5%
Proportion of visitors who stayed overnight	99%	98%	99%	97%	97%
Days stayed (average)	4.1	4.1	4.2	4.3	4.4
Nights stayed (average)	3.1	3.1	3.2	3.3	3.4
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	97%	98%	98%	98%	97%
Number of room occupants (average)	2.0	2.0	2.0	2.0	2.1
Lodging expenditures (average per night — non-package)	$38.53	$38.35	$39.20	$37.26	$41.30
Proportion of visitors who bought a package or travel group trip	13%	14%	13%	13%	14%
Average cost of package per person (among package/tour group visitors)	$242.71	$221.58	$232.92	$235.24	$240.23
Average trip expenditures for food and drink	$204.98	$205.34	$185.30	$122.22	$134.13
Average trip expenditures for local transport	$41.23	$34.27	$61.03	$57.79	$71.93
Average trip expenditures for shopping	$68.26	$57.72	$65.81	$73.64	$66.15
Average trip expenditures for shows	$6.57	$3.75	$5.08	$5.55	$8.84
Average trip expenditures for sightseeing	$5.68	$3.47	$4.74	$7.73	$6.67

GAMING BEHAVIOR AND BUDGETS

Nearly all visitors (99.8%, up significantly from 98.9% in 2009) gambled while in Laughlin. Those who gambled budgeted an average of $575.30, significantly higher than the averages of $511.17 in 2009 and $457.46 in 2010. Gamblers spent an average of 5.8 hours a day gambling, down from 6.0 hours each in 2010 and 2011. Eighty-one percent (81%) of gamblers played slot machines or video machines most often, up significantly from 77% each in 2009 and 2012. Twelve percent (12%) played table games most often (down from 19% in 2009, 20% in 2010, 17% in 2011, and 15% last year).

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2009	2010	2011	2012	2013
Proportion who gambled while visiting Laughlin	99%	99%	99%	100%	100%
Average trip gambling budget (among those who gambled)	$511.17	$457.46	$537.97	$566.38	$575.30
Average hours per day spent gambling (among those who gambled)	5.8	6.0	5.9	6.0	5.8
Average number of different casinos gambled (among those who gambled)	2.1	2.4	2.6	3.0	3.0
Proportion who played slot/video machines most often (among those who gambled)	77%	78%	80%	77%	81%
Proportion who played table games most often (among those who gambled)	19%	20%	17%	15%	12%

ATTITUDINAL INFORMATION

Ninety-four percent (94%) of visitors reported that they were “very satisfied” with their trip to Laughlin, up significantly from 92% in 2009.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2009	2010	2011	2012	2013
Proportion who were “very satisfied” with their current trip to Laughlin	92%	93%	96%	95%	94%

VISITOR DEMOGRAPHICS

Seventy-two percent (72%) of Laughlin visitors were married, down from 76% in 2009 and 79% in 2011. Thirty-three percent (33%) of visitors were from Southern California and 5% were foreign visitors, down from 8% in 2012. One-third (34%) were 65 or older, down significantly from 47% each in 2009 and 2010, 49% in 2011, and 54% last year. Visitors were more likely to be retired (62%, down from 67% in 2012 but up from 2009 – 2011) than employed (34%, up from 30% last year but down from 2009 – 2011). Thirty-eight percent (38%) had a high school diploma or less (down significantly from 2009 – 2011 readings). Fifty-two percent (52%) had a household income of less than $60,000, up from 47% last year but down from 58% in 2010.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2009	2010	2011	2012	2013
Proportion of visitors who were married	76%	75%	79%	75%	72%
Proportion of visitors who were from Southern California	33%	32%	31%	31%	33%
Proportion of visitors who were foreign	6%	6%	7%	8%	5%
Proportion of visitors who were 50 years old or older	80%	80%	83%	84%	74%
Proportion of visitors 65 years old or older	47%	47%	49%	54%	34%
Average age	60.9	60.6	61.8	63.1	57.9
Proportion of visitors who were retired	54%	53%	57%	67%	62%
Proportion of visitors who were employed	42%	41%	38%	30%	34%
Proportion of visitors with a high school diploma or less	44%	43%	45%	42%	38%
Proportion of visitors with a household income less than $60,000	55%	58%	52%	47%	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, 2013 and December 31, 2013 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2009	2010	2011	2012	2013
Days stayed (average)	4.1	4.1	4.2	4.3	4.4
Nights stayed (average)	3.1	3.1	3.2	3.3	3.4
Proportion of visitors who stayed overnight	99%	98%	99%	97%	97%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	97%	98%	98%	98%	97%
Lodging expenditures (average per night — non-package)	$38.53	$38.35	$39.20	$37.26	$41.30
Proportion of visitors who bought a package or travel group trip	13%	14%	13%	13%	14%
Average cost of package per person (among package/tour group visitors)	$242.71	$221.58	$232.92	$235.24	$240.23
Number of room occupants (average — hotel/motel only)	2.0	2.0	2.0	2.0	2.1
Average trip expenditures for food and drink	$204.98	$205.34	$185.30	$122.22	$134.13
Average trip expenditures for local transportation	$41.23	$34.27	$61.03	$57.79	$71.93
Average trip expenditures for shopping	$68.26	$57.72	$65.81	$73.64	$66.15
Average trip expenditures for shows	$6.57	$3.75	$5.08	$5.55	$8.84
Average trip expenditures for sightseeing	$5.68	$3.47	$4.74	$7.73	$6.67
Proportion who gambled while visiting Laughlin	99%	99%	99%	100%	100%
Average trip gambling budget (among those who gambled)	$511.17	$457.46	$537.97	$566.38	$575.30

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 2013. 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 2013 study and compares them to the results of the 2009, 2010, 2011, and 2012 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 2013, 85% of visitors said they had visited Laughlin more than once, and 15% were first-time visitors (Figure 1). There were significantly more repeat visitors than in 2009 (81%).

FIGURE 1
First Visit Vs. Repeat Visit

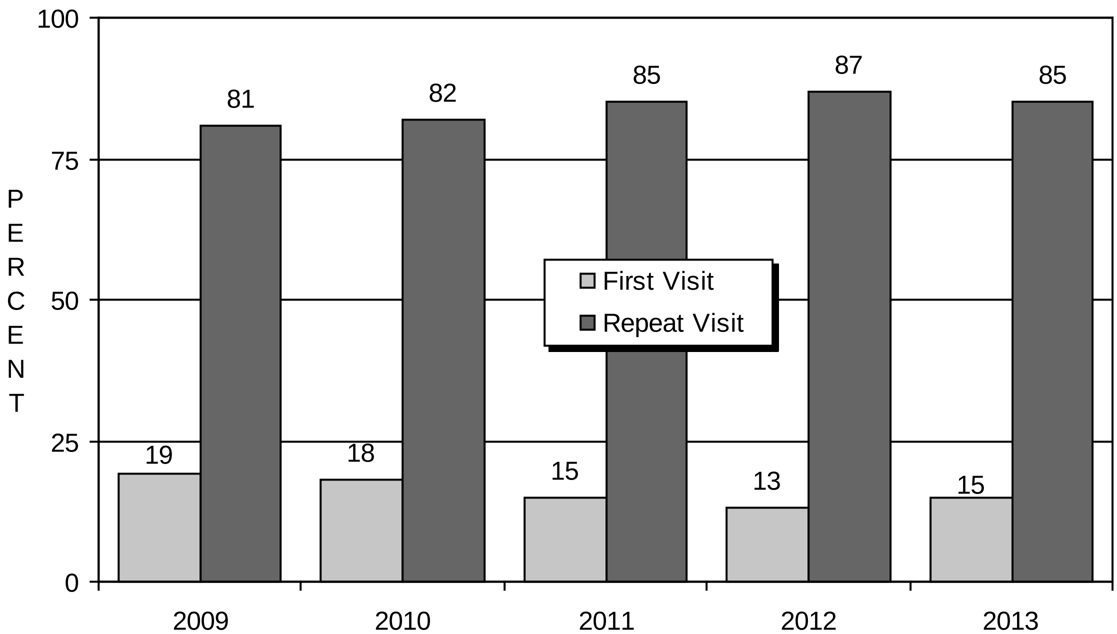
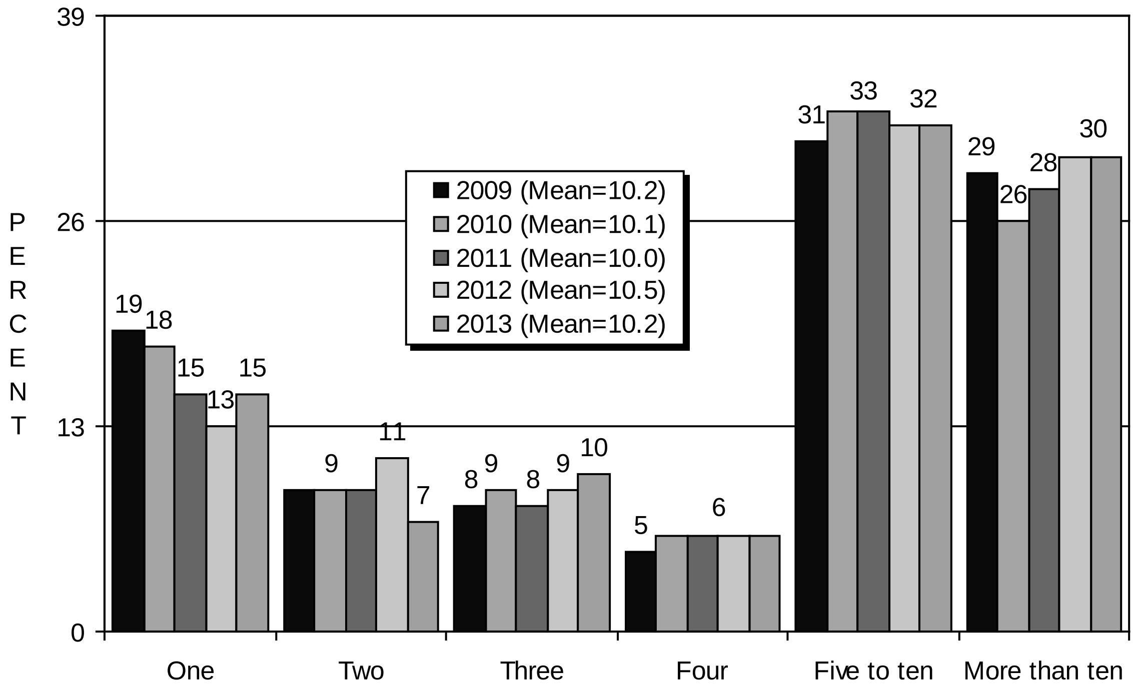
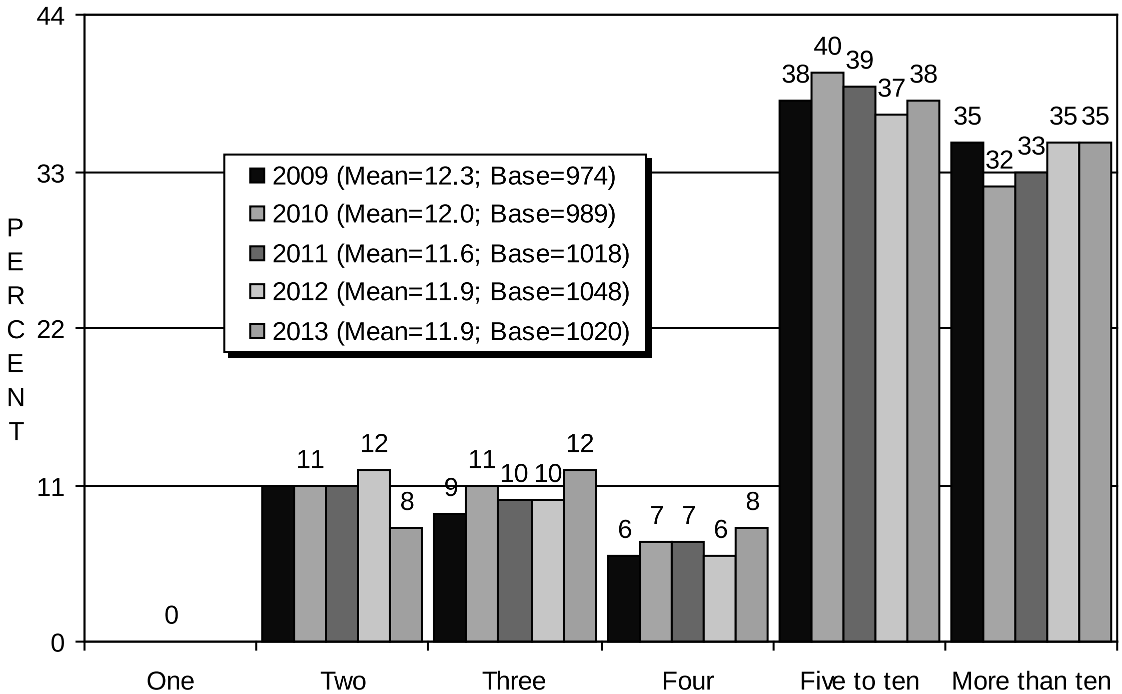


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



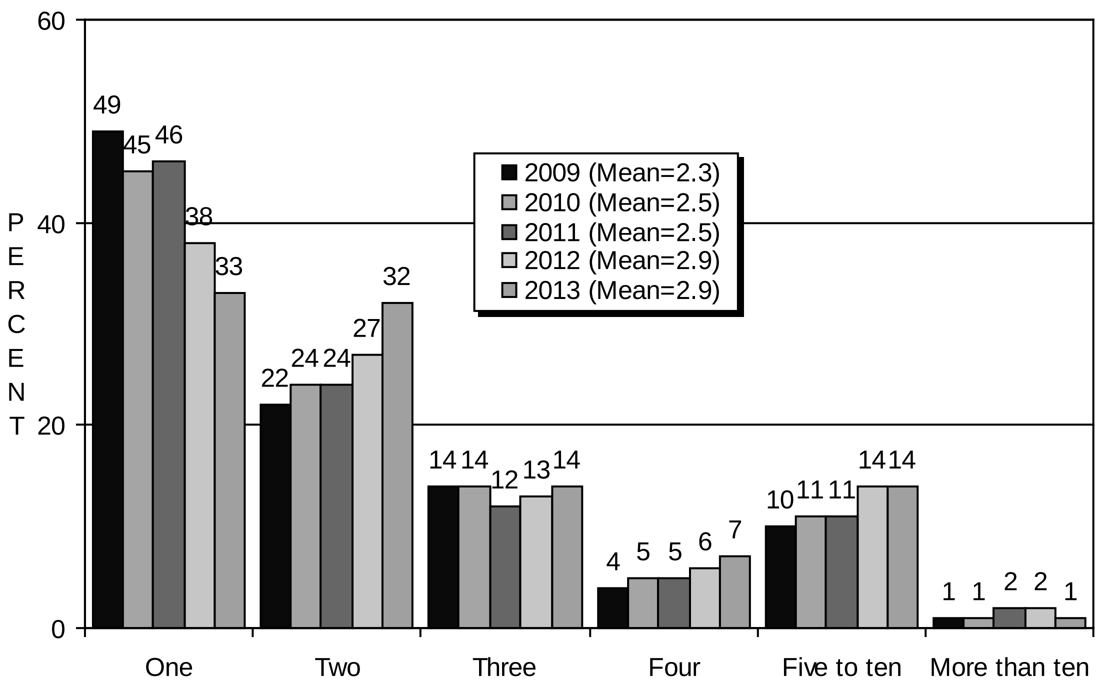
The average number of visits to Laughlin in the past five years *among all visitors* was 10.2 in this year's survey, not significantly different from the past four years (Figure 2). The proportion of visitors saying they visited only once in the past five years was 15%, significantly lower than in 2009 (19%), while the proportion saying they visited twice (7%) was significantly lower than 9% in 2009 – 2011 and 11% in 2012. Ten percent (10%) said they visited three times, up significantly from 8% in 2009.

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



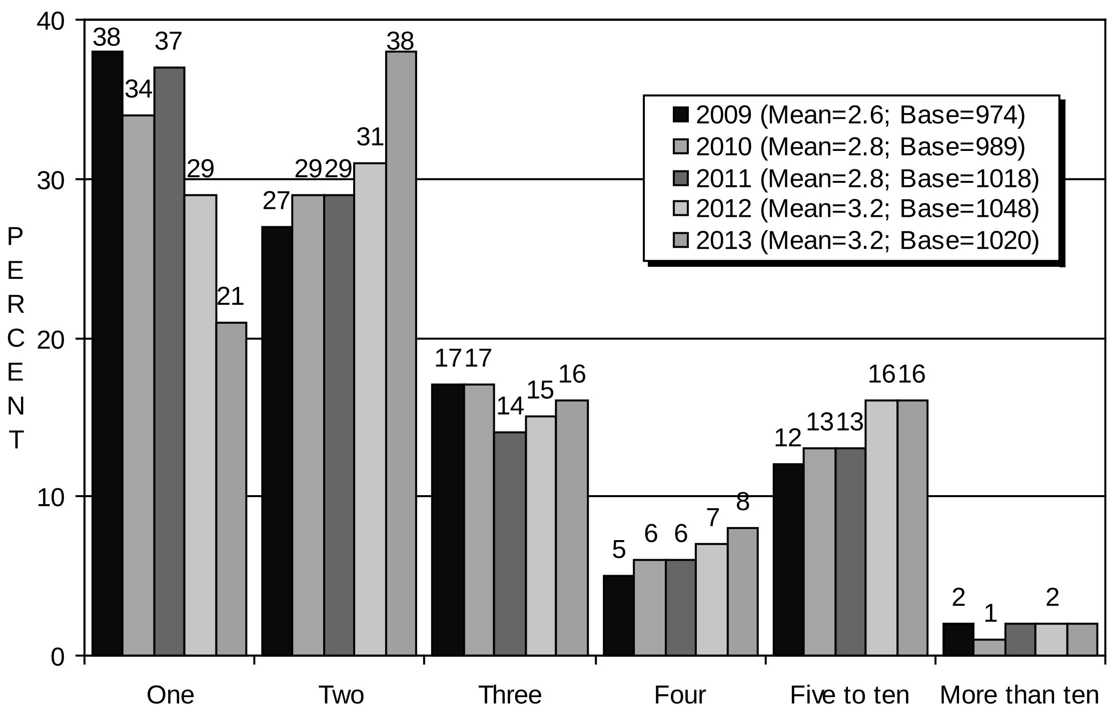
The average number of visits to Laughlin during the past five years *among repeat visitors* was 11.9, not significantly different from past years (Figure 3).

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



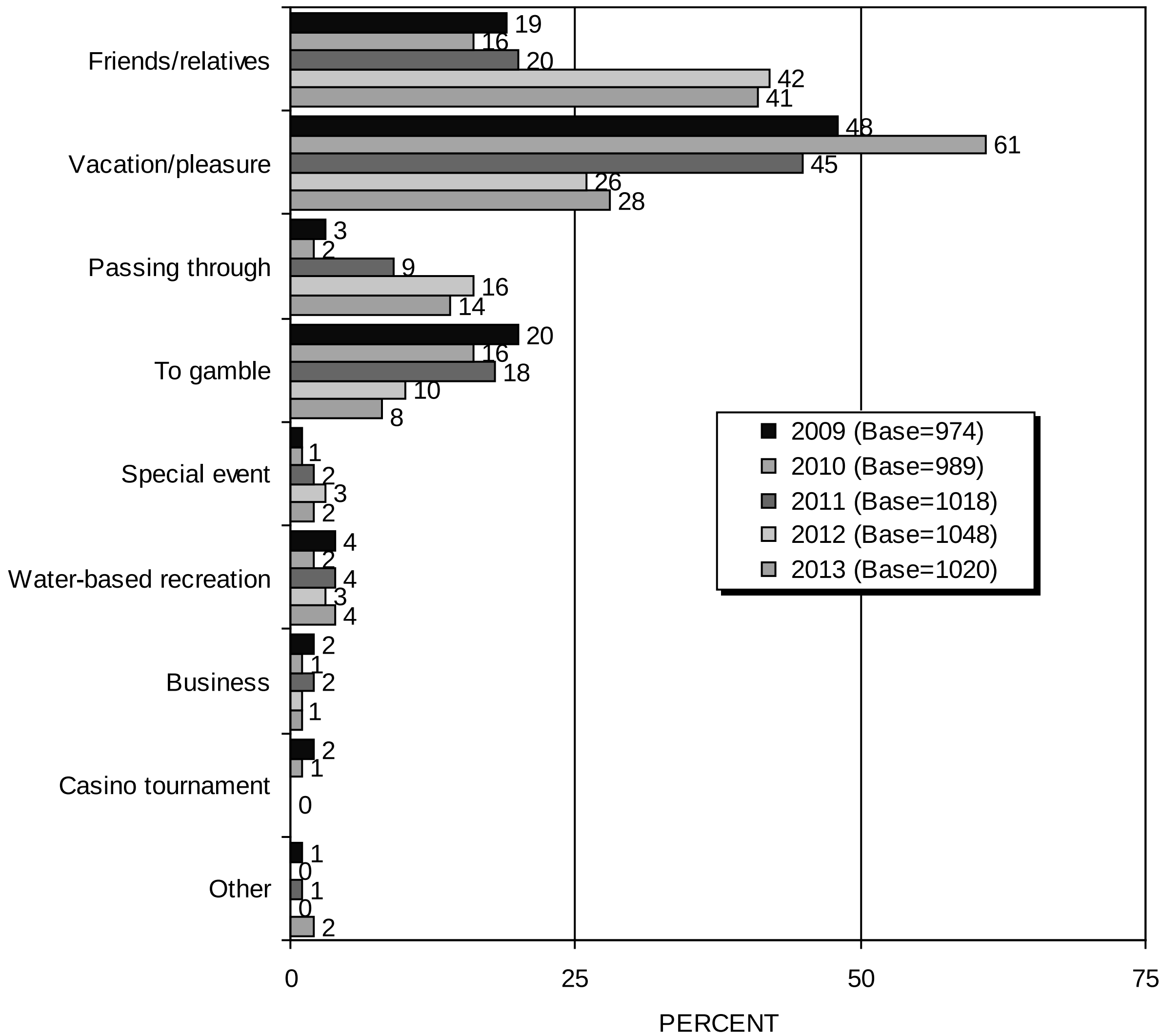
Among *all visitors*, the average number of visits in the past year was 2.9, the same as last year, but up significantly from 2.3 in 2009 and 2.5 each in 2010 and 2011 (Figure 4). Thirty-three percent (33%) reported visiting Laughlin only once in the past year (down significantly from 2009 – 2012), while 32% reported visiting twice (up significantly from 2009 – 2012). The proportions who reported visiting Laughlin four times (7%), or five to 10 times (14%), in the past five years were both higher than in 2009 – 2011.

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



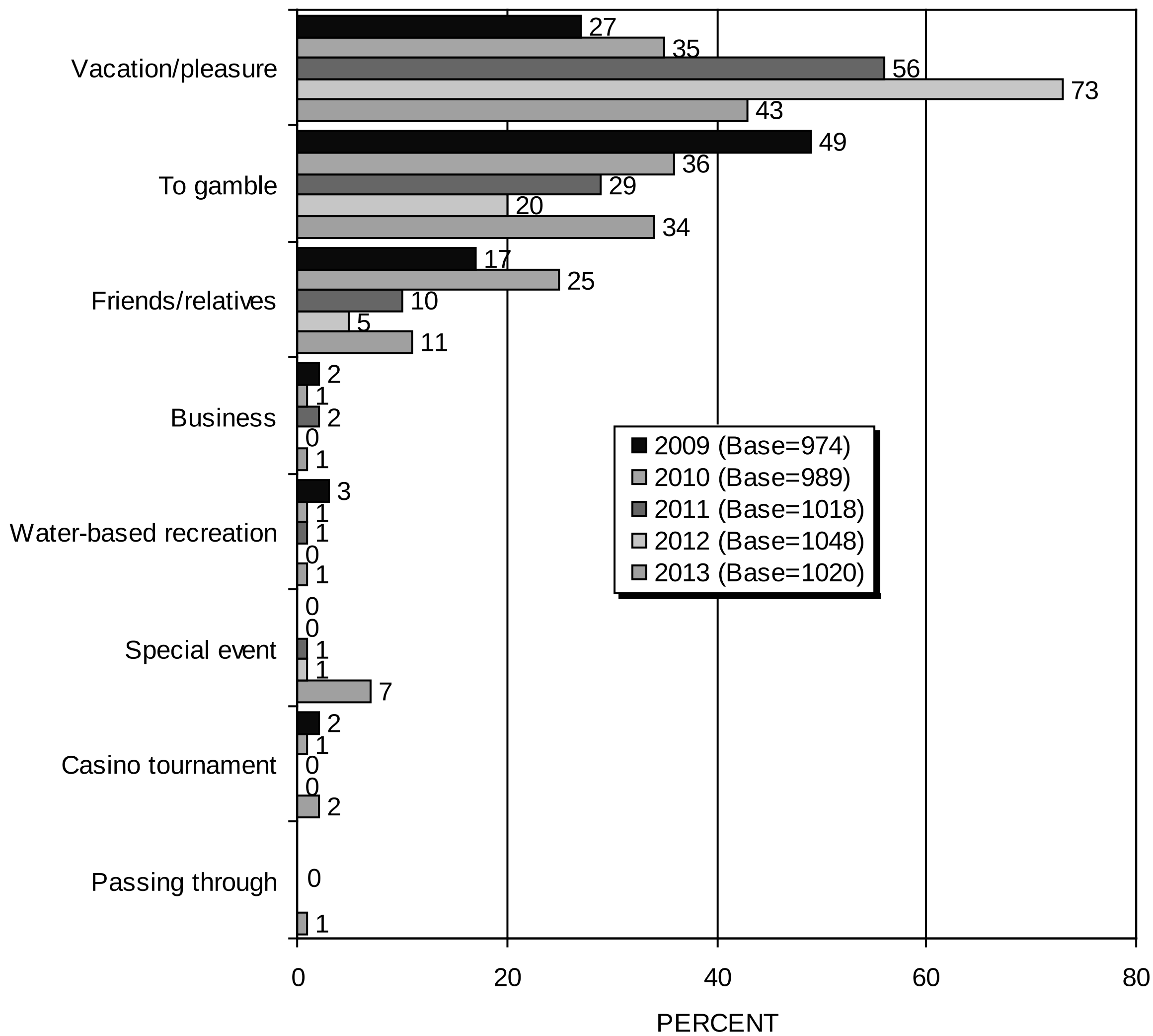
During the past year, repeat visitors averaged 3.2 trips to Laughlin, the same as last year, but up significantly from 2.6 in 2009 and 2.8 each in 2010 and 2011 (Figure 5). Among repeat visitors, 21% reported visiting just once in the past year (down significantly from 2009 – 2012), while 38% reported visiting twice (up from 2009 – 2012). Eight percent (8%) reported visiting four times (up significantly from 5% in 2009 and 6% each in 2010 and 2011), while 16% reported visiting five to 10 times (up from 12% in 2009 and 13% each in 2010 and 2011).

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



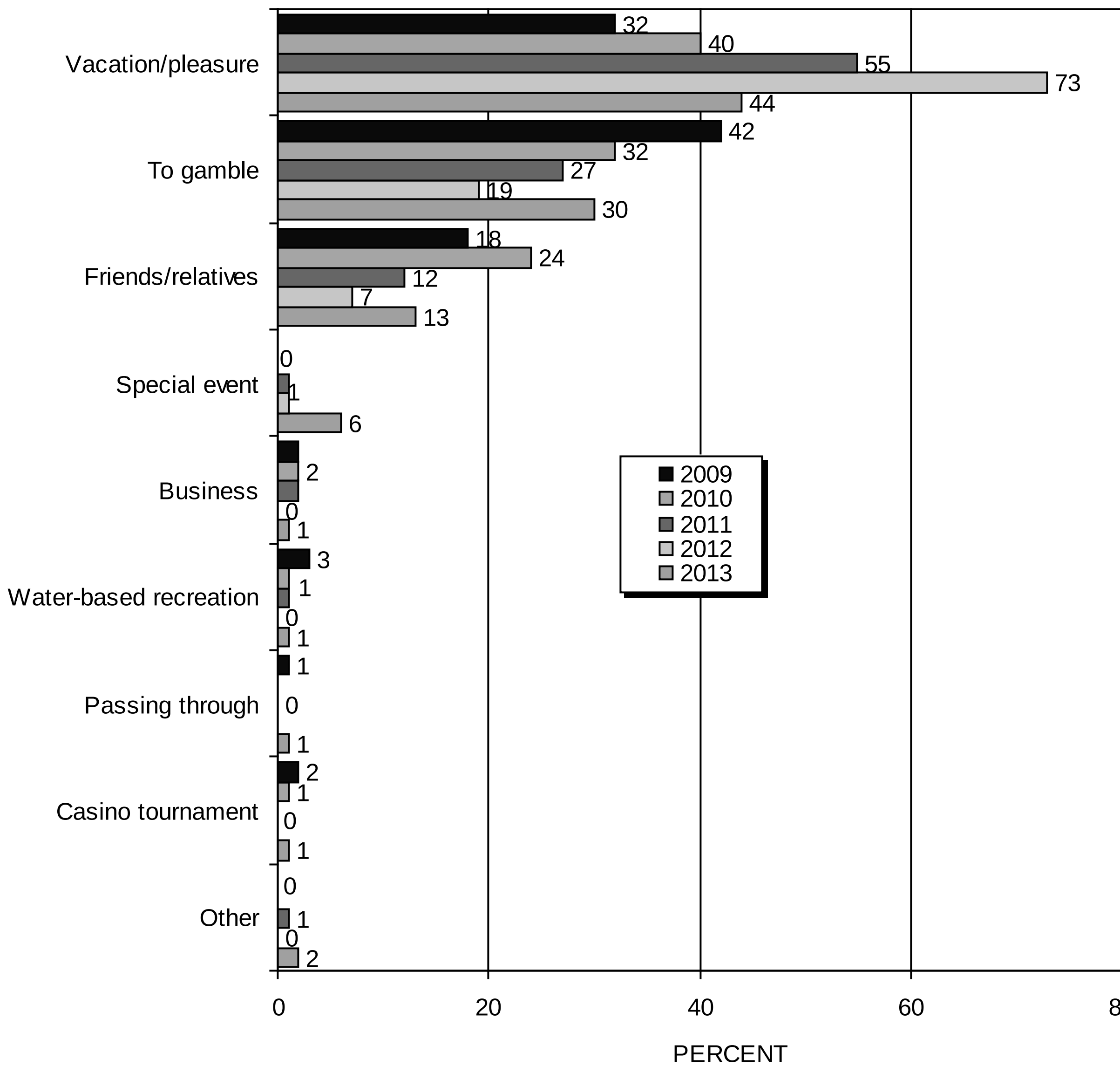
Twenty-eight percent (28%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure – about the same as last year but a significant decrease from 48% in 2009, 61% in 2010, and 45% in 2011 (Figure 6). Eight percent (8%) said they first came to Laughlin for gambling – also similar to last year but down significantly from 20% in 2009, 16% in 2010, and 18% in 2011. Forty-one percent (41%) said they first came to Laughlin to visit friends or family, a significant increase from 19% in 2009, 16% in 2010, and 20% in 2011. Fourteen percent (14%) said they first came to Laughlin because they were just passing through (up from 2009 – 2011).

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



Among repeat visitors, 43% said that the primary purpose for their *current* visit to Laughlin was vacation or pleasure, up from 27% in 2009 and 35% in 2010 but down significantly from 56% in 2011 and 73% last year (Figure 7). The proportion who said they came to gamble was 34%, up from 29% in 2011 and 20% last year but down from 49% in 2009. Eleven percent (11%) said they came to visit friends or family, up from 5% last year but down significantly from 17% in 2009 and 25% in 2010. Seven percent (7%) said they were visiting Laughlin to attend a special event, up significantly from 2009 – 2012.

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



Among *all visitors* in 2013, 44% reported that the primary purpose for their current visit to Laughlin was vacation or pleasure, up significantly from 32% in 2009 and 40% in 2010 but down from 55% in 2011 and 73% last year (Figure 8). Thirty percent (30%) of all visitors said gambling was the primary reason for their current visit, up from 19% last year but down from 42% in 2009. Thirteen percent (13%) said they came to visit friends or relatives, up 7% last year but down from 18% in 2009 and 24% in 2010. Six percent (6%) said they were visiting Laughlin to attend a special event (up from 2009 – 2012).

FIGURE 9
Primary Purpose Of First Visit Vs. Current Visit — 2013
(Among Repeat Visitors)

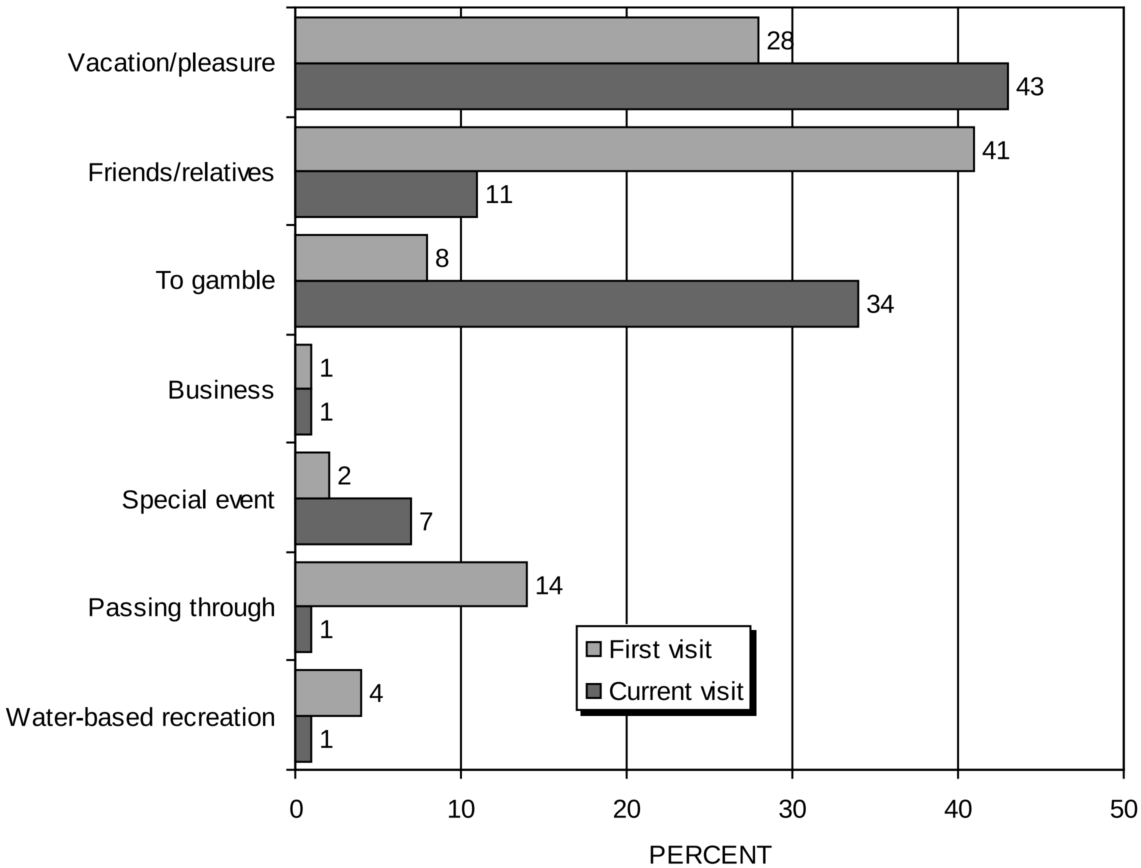


Figure 9 compares the primary purpose given by *repeat visitors* for their first visit to Laughlin versus the primary reason for their current visit in 2013. Repeat visitors were more likely to first visit Laughlin to visit friends or relatives (41% vs. 11% who did so on their current visit) or to say they were just passing through (14% vs. 1%). By contrast, repeat visitors were more likely to say their current visit to Laughlin was for vacation or pleasure (43% vs. 28% who did so on their first visit) or to gamble (34% vs. 8%). Repeat visitors were also more likely to say they were visiting Laughlin on their current visit to attend a special event (7% vs. 2% who did so on their first visit).

FIGURE 10
Primary Purpose Of Current Visit — 2013
(First-Time Vs. Repeat Visitors)

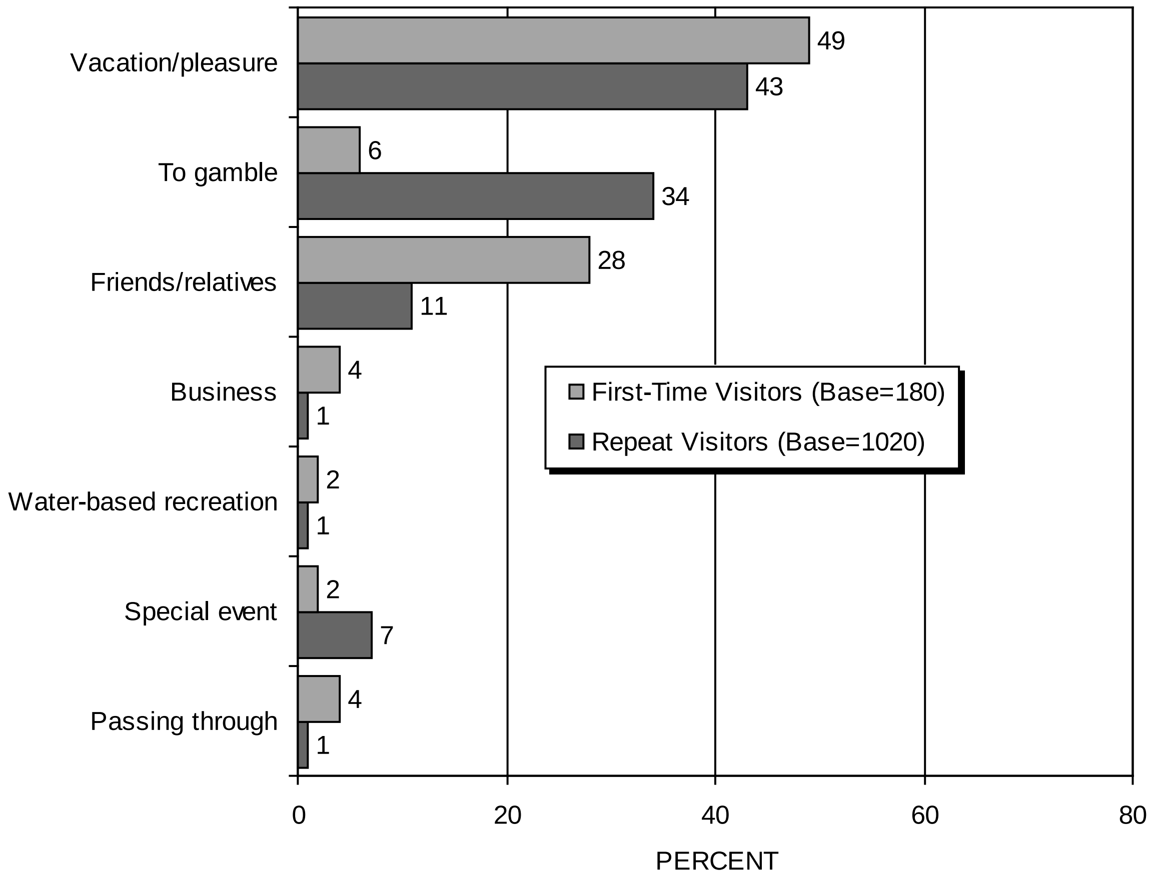
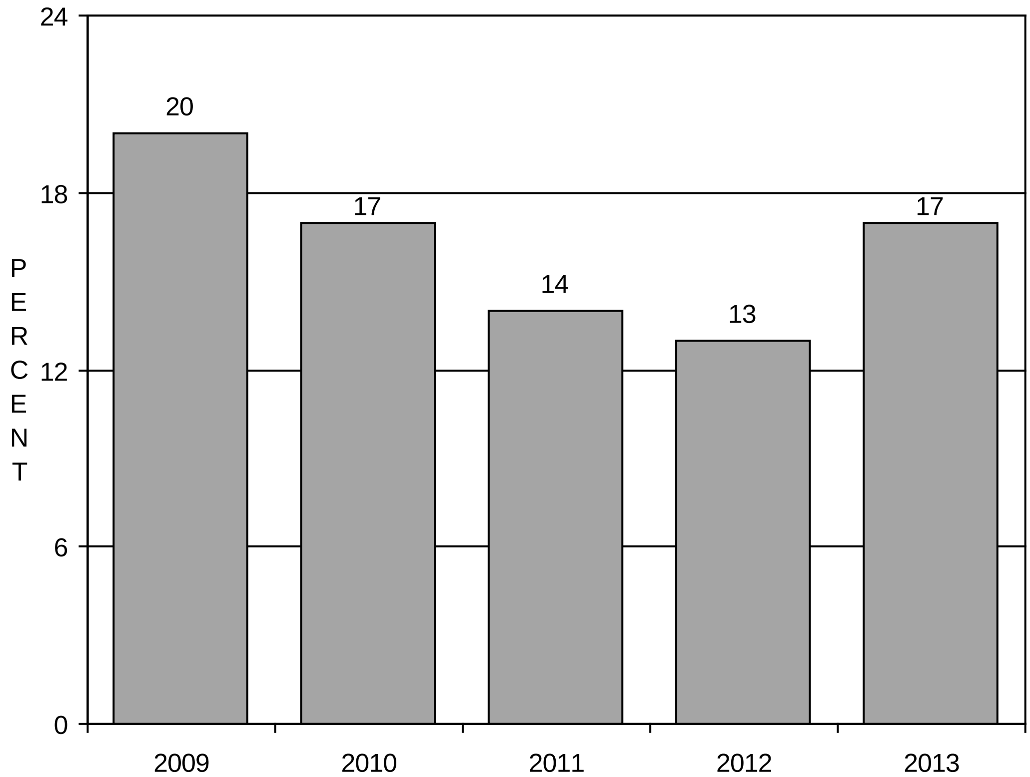


Figure 10 compares *first-time visitors* with *repeat visitors* in terms of the purpose of their *current* visit to Laughlin in 2013. First-time visitors were significantly more likely than repeat visitors to say their current visit to Laughlin was to visit friends or relatives (28% vs. 11%), while repeat visitors were significantly more likely than first-time visitors to say they were visiting Laughlin primarily to gamble (34% vs. 6%).

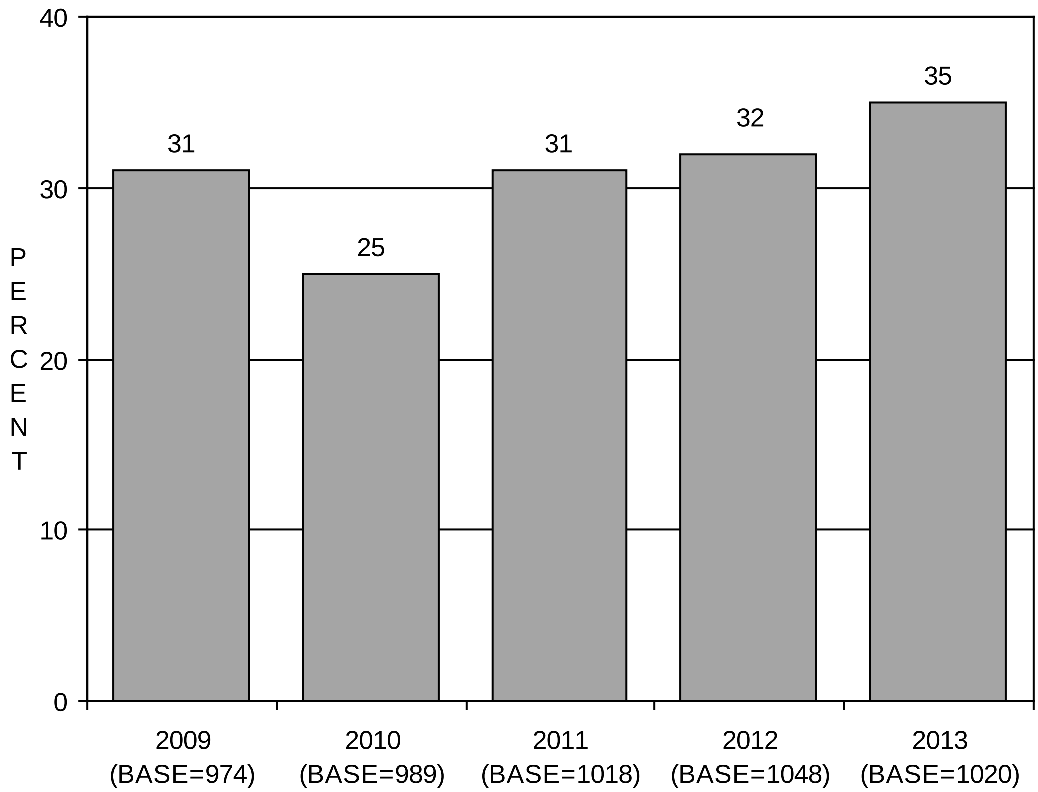
FIGURE 11
Gaming Tournaments*



We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). In 2013, 17% said they planned to participate in a gaming tournament, up significantly from 14% in 2011 and 13% in 2012.

* 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-five percent (35%) said they had, significantly more than in 2010 (25%) and 2011 (31%).

*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 59% in 2009 and 54% in 2010), while 38% planned their trip more than 30 days in advance (up from 28% in 2009 and 29% in 2010). Specifically, the proportion planning their trip seven in 14 days in advance (21%) was down significantly from 2009 – 2011, while the proportion planning their trip more than 90 days in advance (12%) was up significantly from 2009 – 2011. Three percent (3%) said they planned their trip on the same day they traveled to Laughlin, down from 5% in 2009 and 6% in 2010.

FIGURE 13
Advance Travel Planning

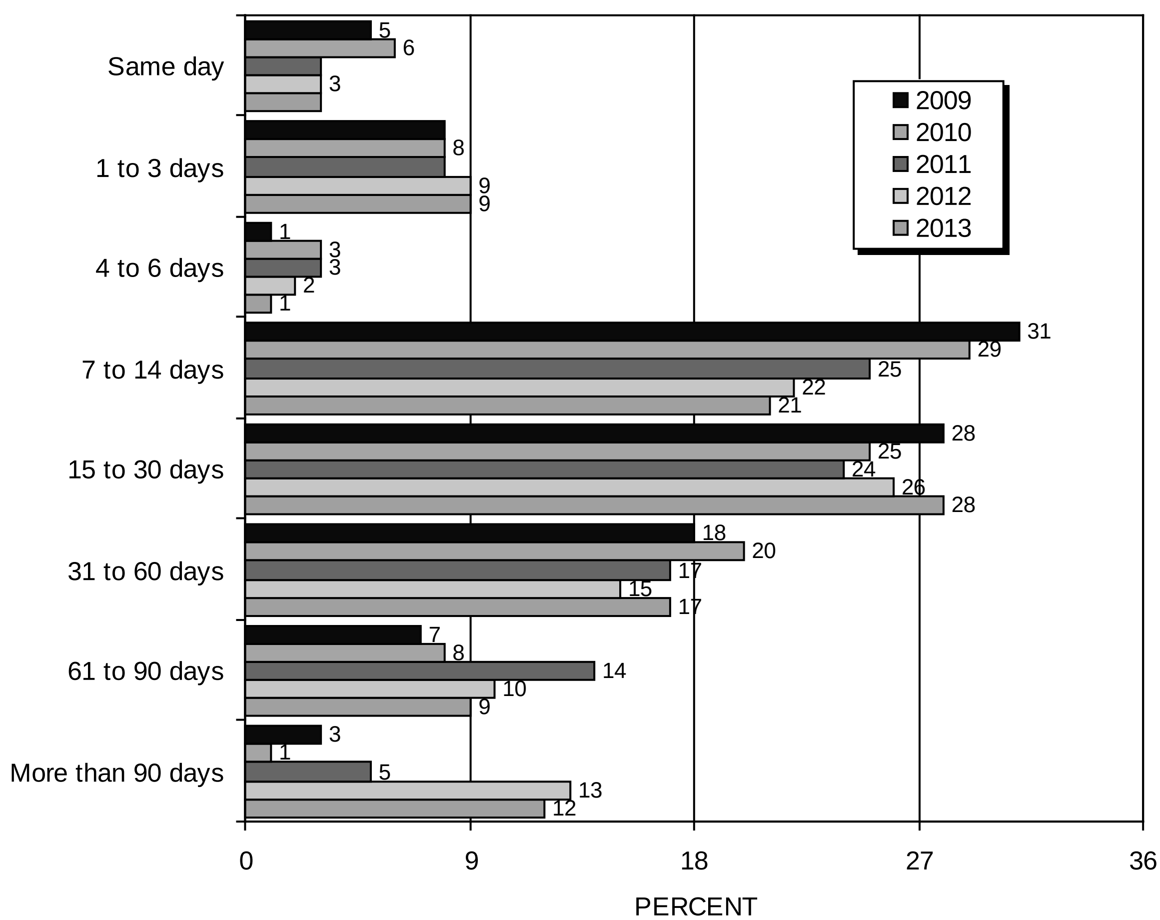
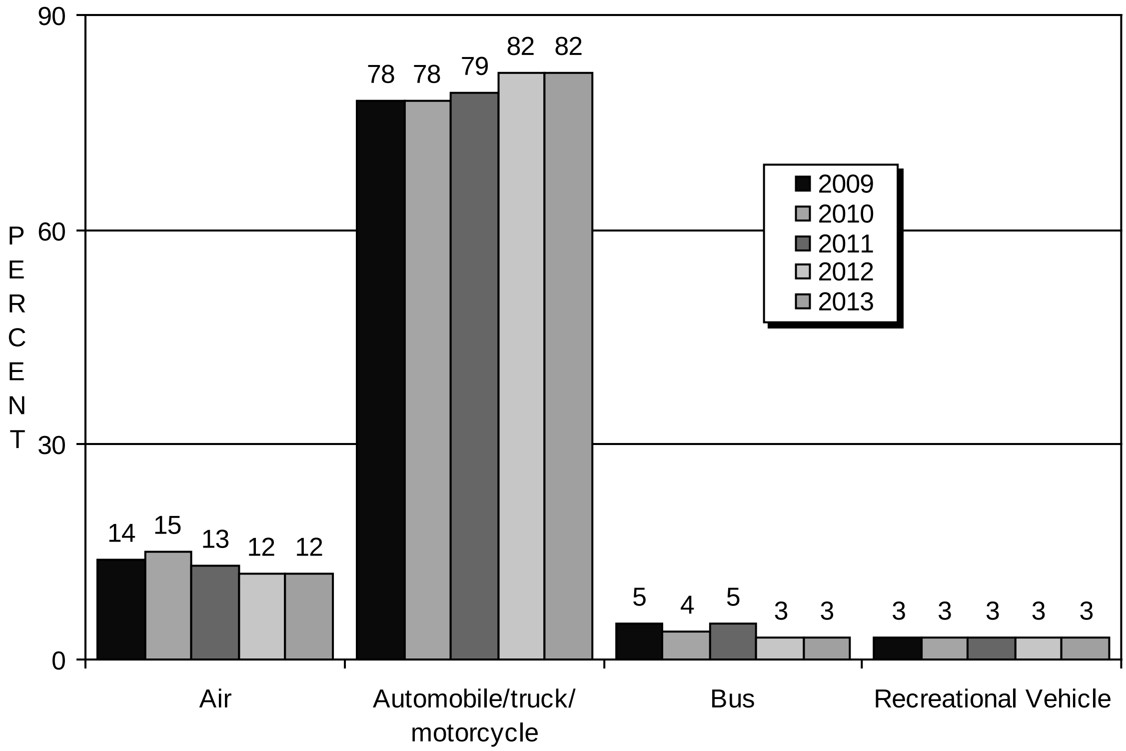
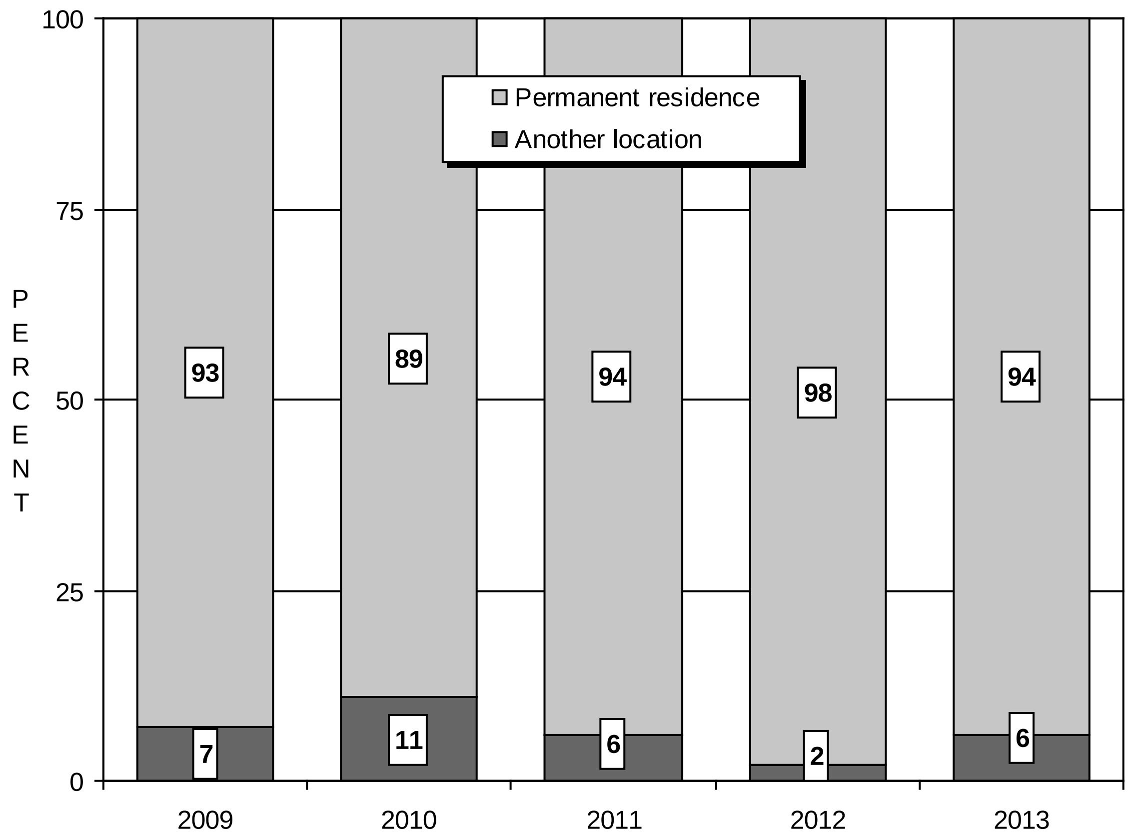


FIGURE 14
Transportation To Laughlin/Bullhead City



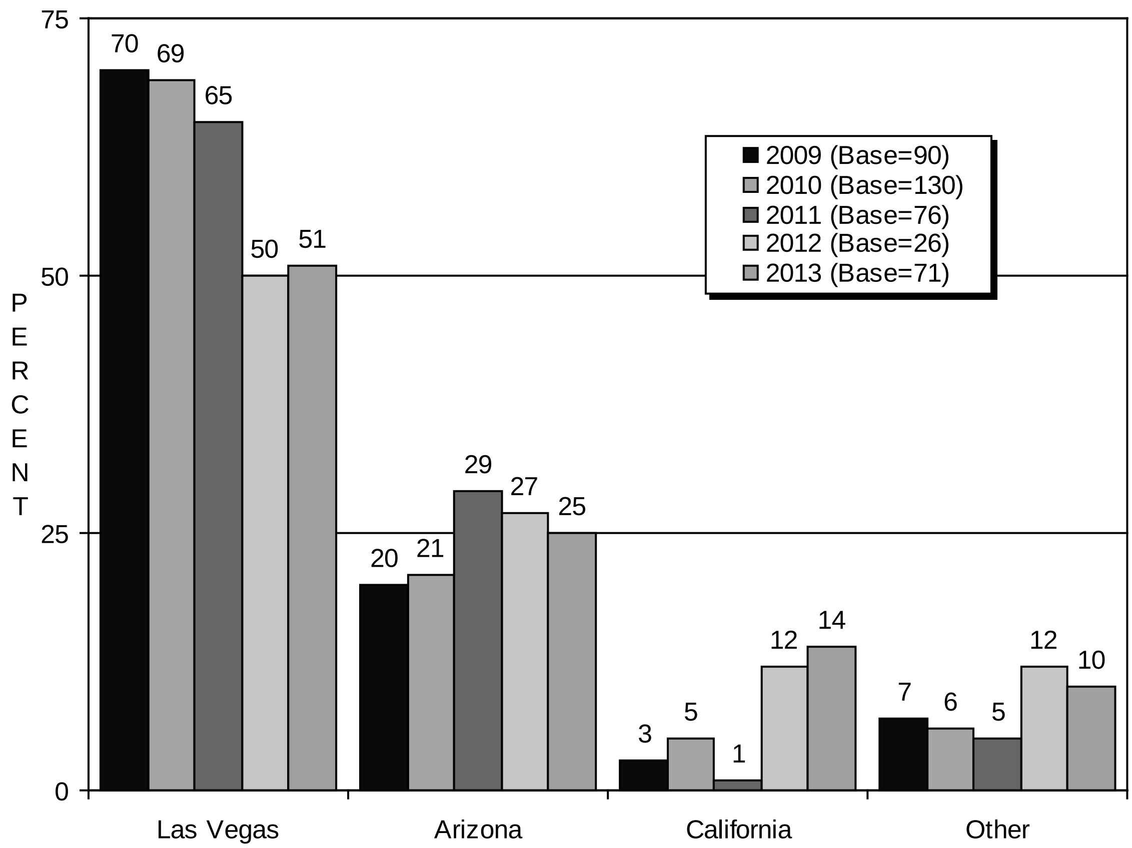
As in past years, most visitors traveled to Laughlin by automobile, truck, or motorcycle (82%, up significantly from 78% in 2009 – 2010 and 79% in 2011) (Figure 14). Twelve percent (12%) said they came by air (down from 15% in 2010), 3% traveled by bus (down from 2009 – 2011), and another 3% came in an RV.

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



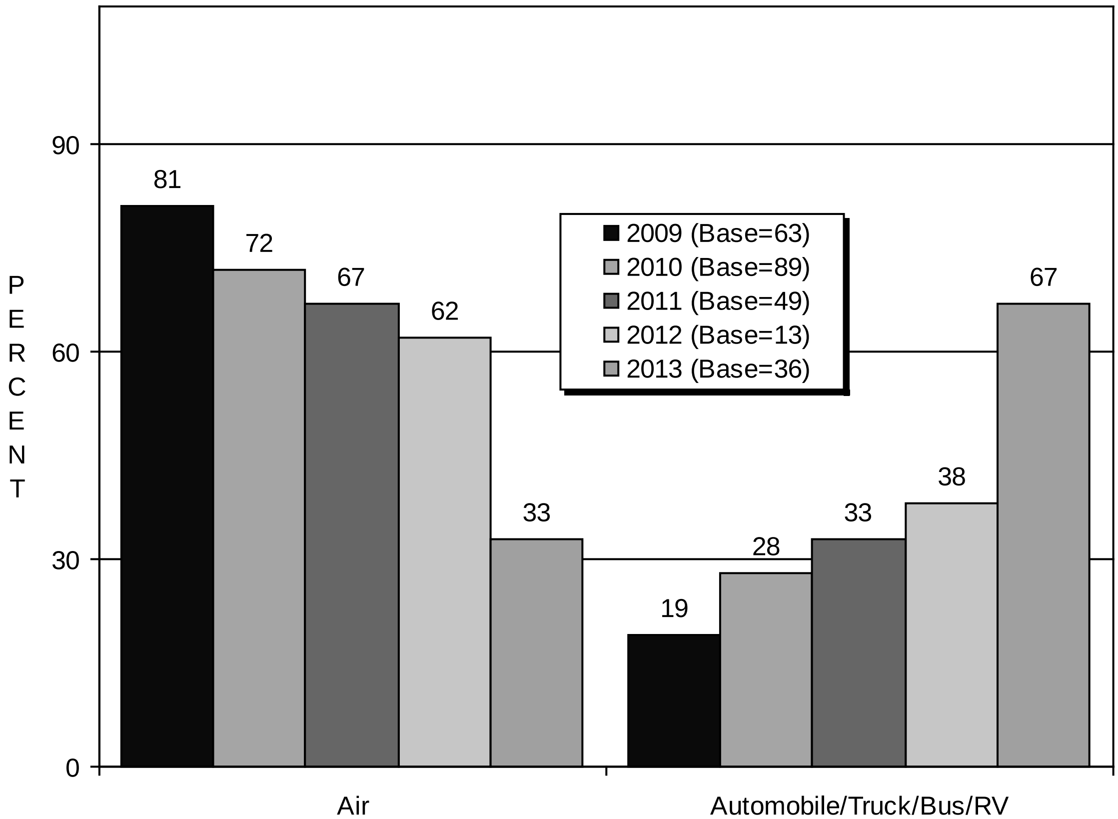
As in the past, the vast majority of visitors arrived in Laughlin directly from their permanent residences (94%, down from 98% last year but up from 89% in 2010) (Figure 15).

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



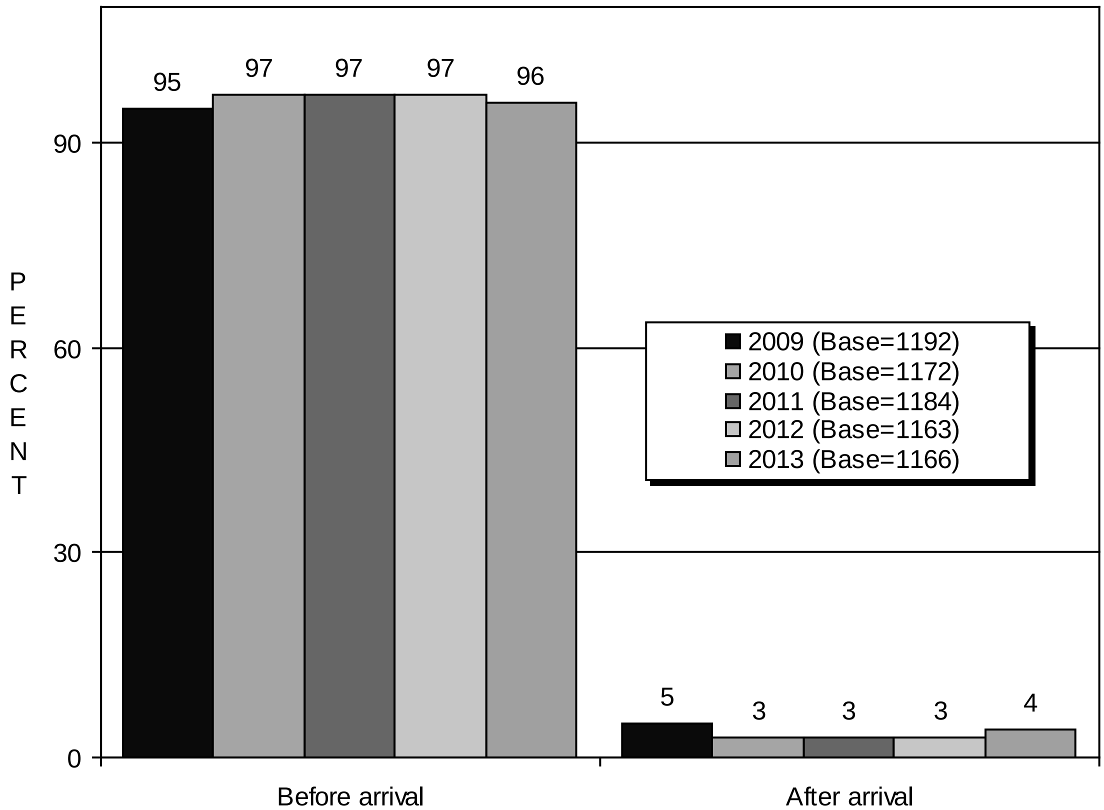
Among those who came to Laughlin after visiting another location (Figure 16), about one-half (51%) came from Las Vegas (down from 70% in 2009 and 69% in 2010). One-quarter (25%) came from Arizona, while 14% came from California (up from 2009 – 2011), and 10% from elsewhere.

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



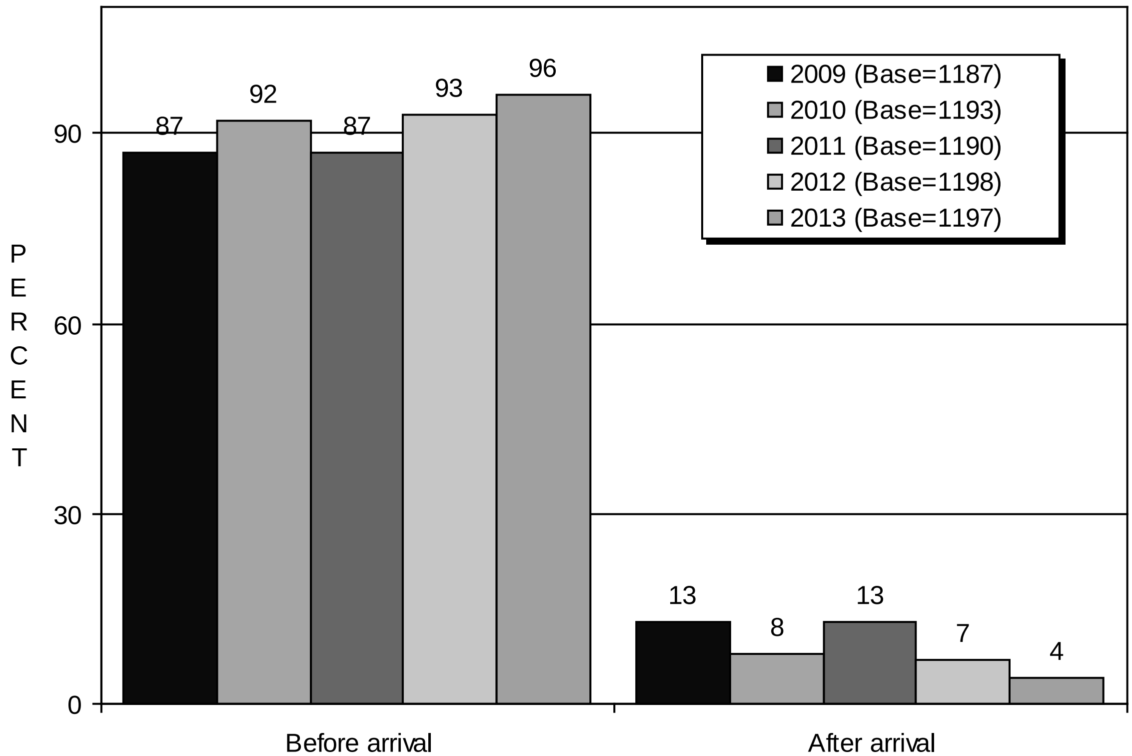
We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Of these 36 visitors, two-thirds (67%) said they arrived by ground transportation (up from 2009 – 2012), while one-third (33%) arrived by air (down from 2009 – 2012).

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



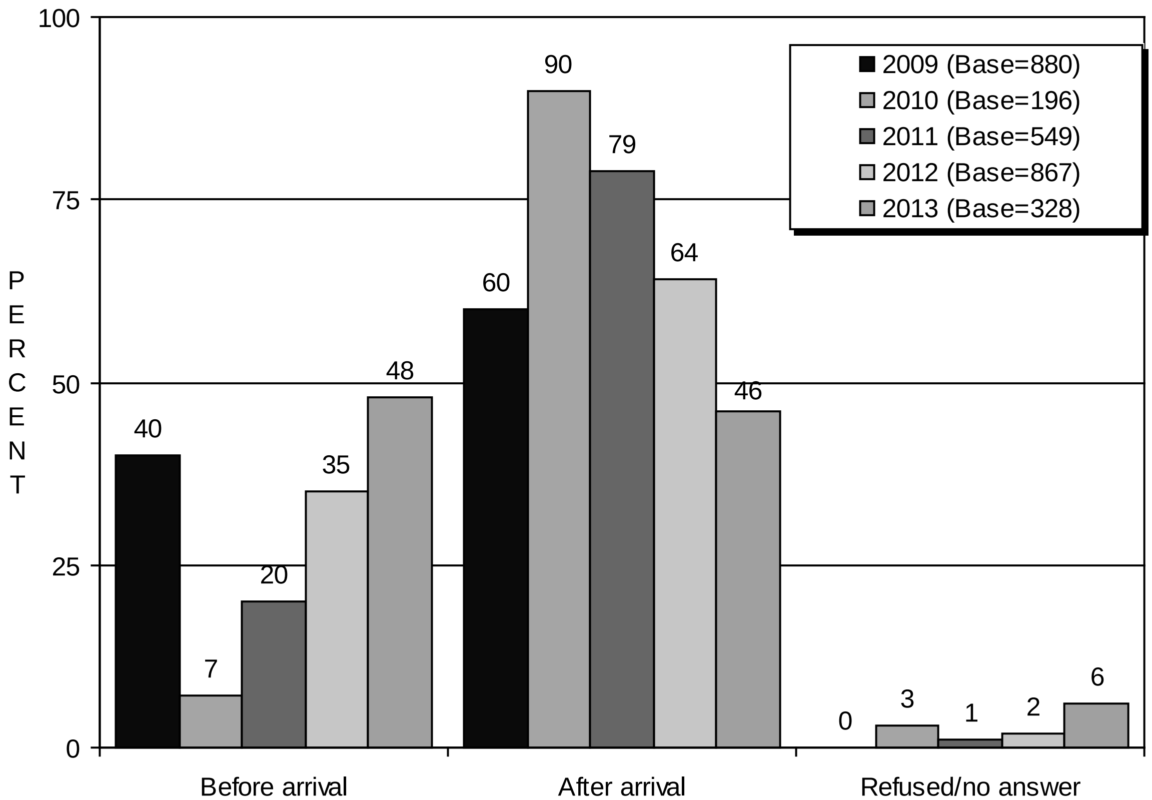
Most visitors decided where to stay in Laughlin prior to their visits (96%, up significantly from 95% in 2009), while 4% decided after arrival (down from 5% in 2009) (Figure 18).

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



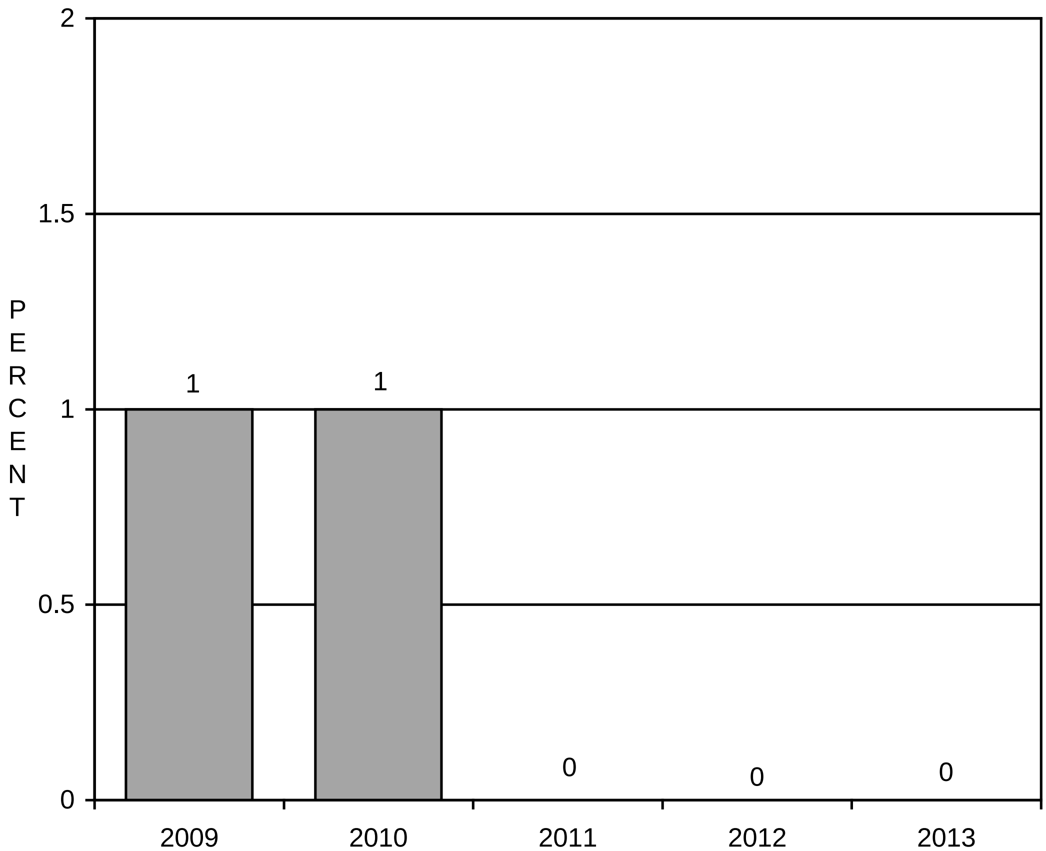
Ninety-six percent (96%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (Figure 19), up significantly from 2009 – 2012. Four percent (4%) reported making their decision about where to gamble after they arrived in Laughlin, down from 2009-2012.

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



Among visitors who reported going to see a show, 48% said they decided what shows to see before their arrival in Laughlin, up significantly from 40% in 2009, 7% in 2010, 20% in 2011, and 35% last year (Figure 20). Forty-six percent (46%) said they decided what shows to see after arriving in Laughlin, down from 60% in 2009, 90% in 2010, 79% in 2011, and 64% last year.

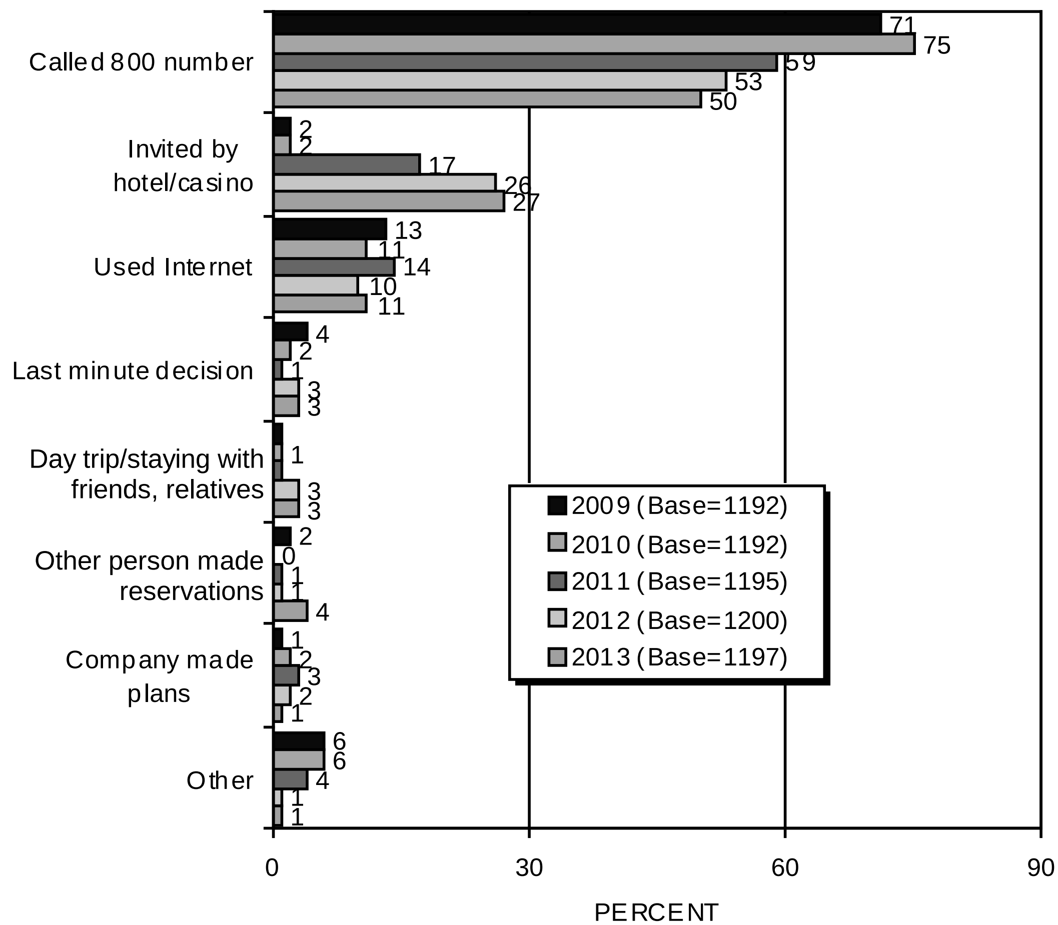
FIGURE 21
Travel Agent Assistance*
(Among All Visitors)



In 2013, only one visitor to Laughlin said they were assisted in their travel planning by a travel agent (Figure 21).

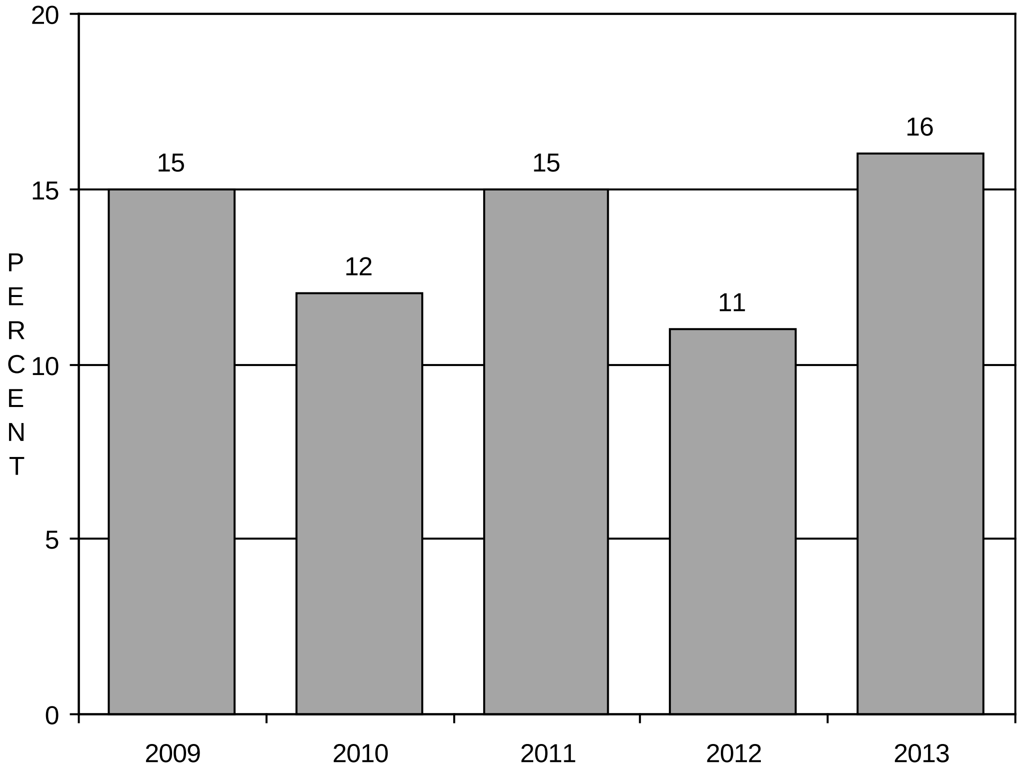
* Only "yes" responses are reported in this chart.

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 percent (50%) said it was because they used an 800 number, down significantly from 71% in 2009, 75% in 2010, and 59% in 2011. Twenty-seven percent (27%) said they got an invitation from a hotel/casino, up from 2% each in 2009 and 2010. Eleven percent (11%) said they used the Internet to make their travel arrangements, down significantly from 14% in 2011. Four percent (4%) explained that someone else made the reservations (up from 2009 – 2012), 3% said it was because it was a daytrip or they were staying with friends or relatives (up from 1% each in 2009-2011), while another 3% said it was a last minute decision (up from 2% in 2010 and 1% in 2011).

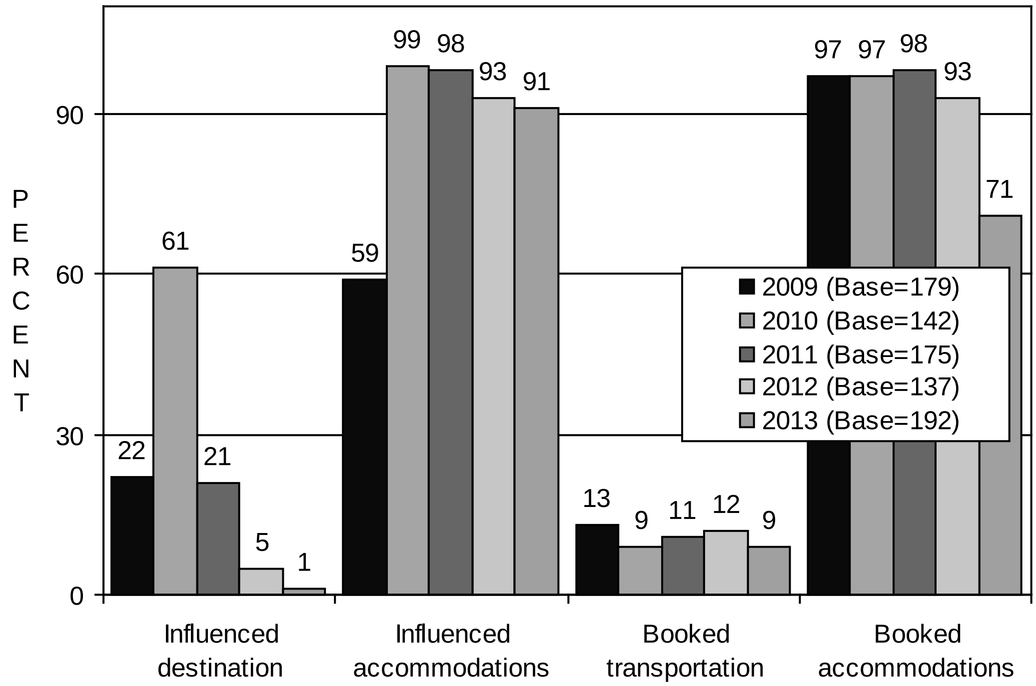
FIGURE 23
Whether Used Internet To Plan Trip*



In 2013, 16% of visitors said they used the Internet to plan their trip to Laughlin, up significantly from 12% in 2010 and 11% in 2012 (Figure 23).

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

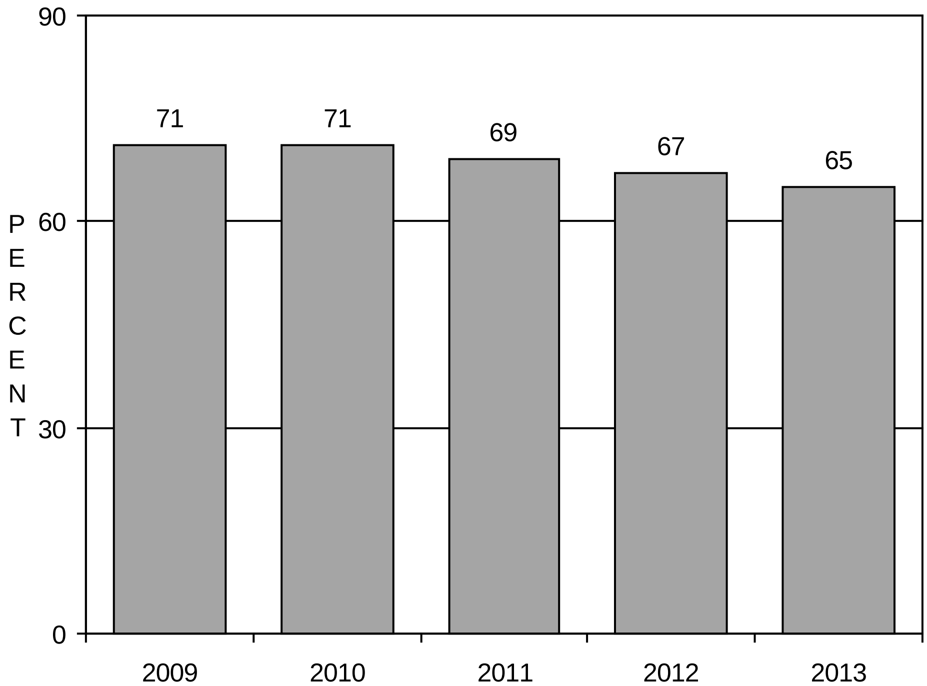
FIGURE 24
Internet Influence And Use*
(Among Those Who Used Internet To Plan Trip)



Among visitors who used the Internet to plan their trip, seven in ten (71%) booked their accommodations online (down significantly from 97% each in 2009 and 2010, 98% in 2011, and 93% last year) (Figure 24). Nine in ten (91%) said the Internet influenced their choice of accommodations (up from 59% in 2009 but down from 99% in 2010 and 98% in 2011). Nine percent (9%) said they booked transportation to Laughlin online, not significantly different from past years. One percent (1%) also said the Internet influenced their decision to visit Laughlin, down significantly from 22% in 2009, 61% in 2010, 21% in 2011, and 5% last year.

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

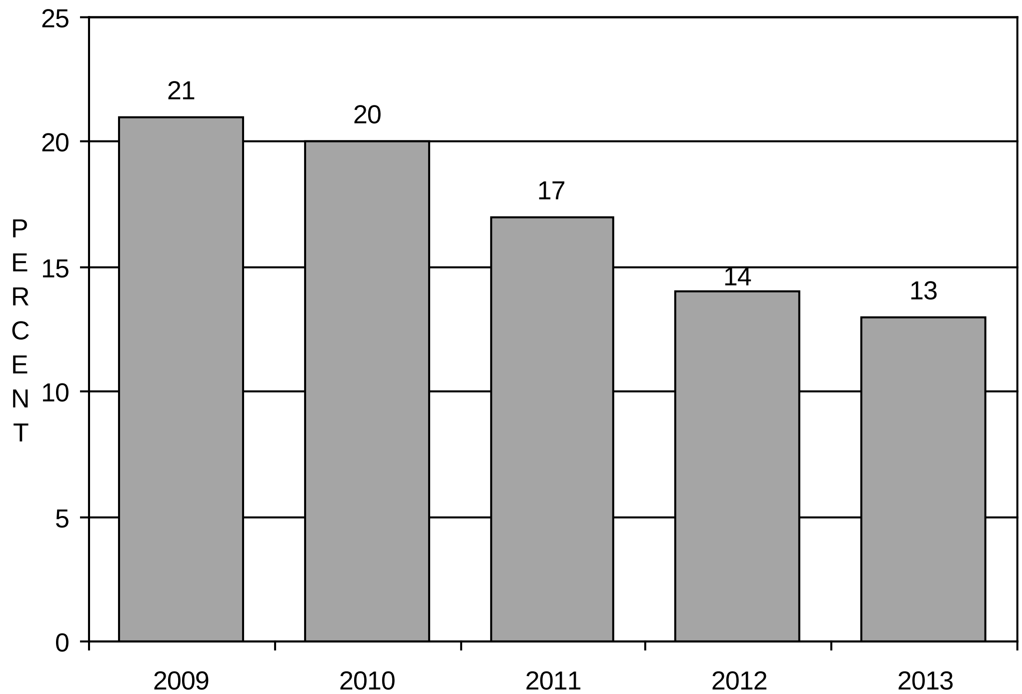
FIGURE 25
Whether Visited Las Vegas During Past Five Years*



Sixty-five percent (65%) of Laughlin visitors said they have visited Las Vegas in the past five years, similar to last year but down significantly from 71% each in 2009 and 2010 and 69% in 2011 (Figure 25).

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

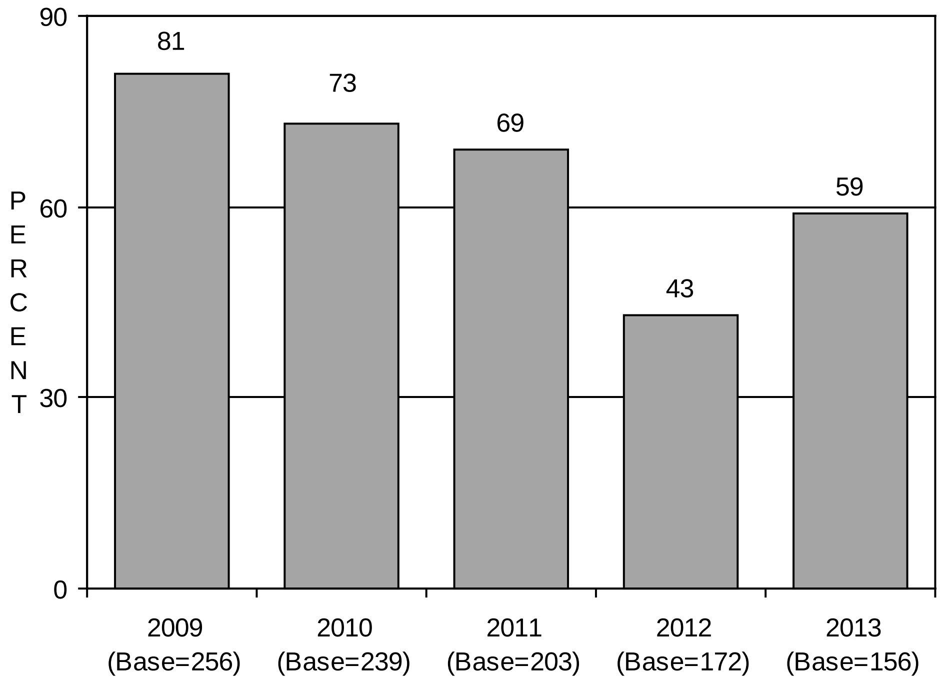
FIGURE 26
Visiting Las Vegas
On This Trip To Laughlin*



Thirteen percent (13%) of Laughlin visitors said they had visited or were planning to visit Las Vegas on this trip, similar to last year but down significantly from 21% in 2009, 20% in 2010, and 17% in 2011 (Figure 26).

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

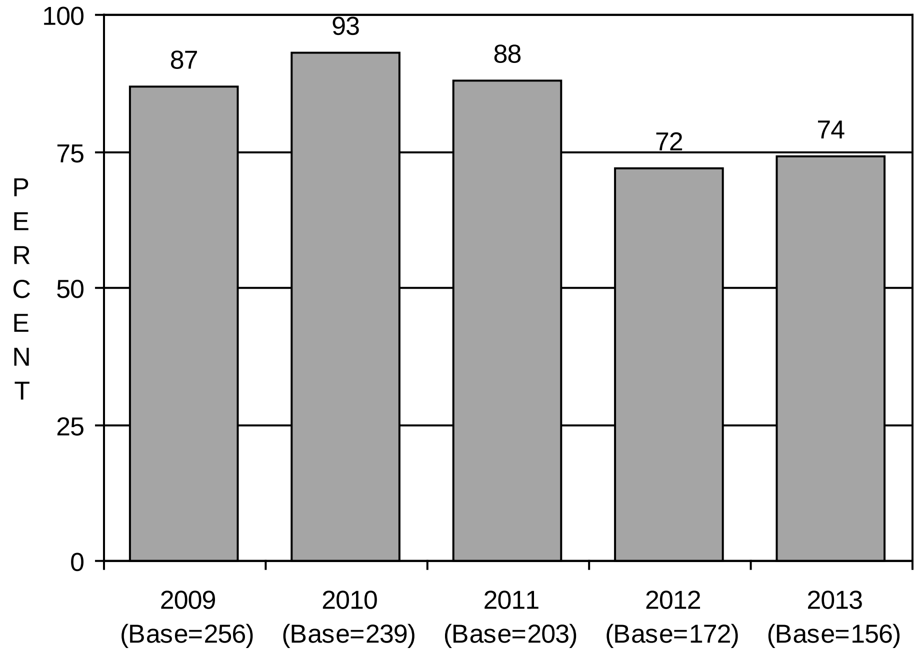
FIGURE 27
Visiting Downtown Las Vegas*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, 59% said they had visited or intended to visit Downtown, up from 43% last year but down from 81% in 2009, 73% in 2010, and 69% in 2011 (Figure 27).

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

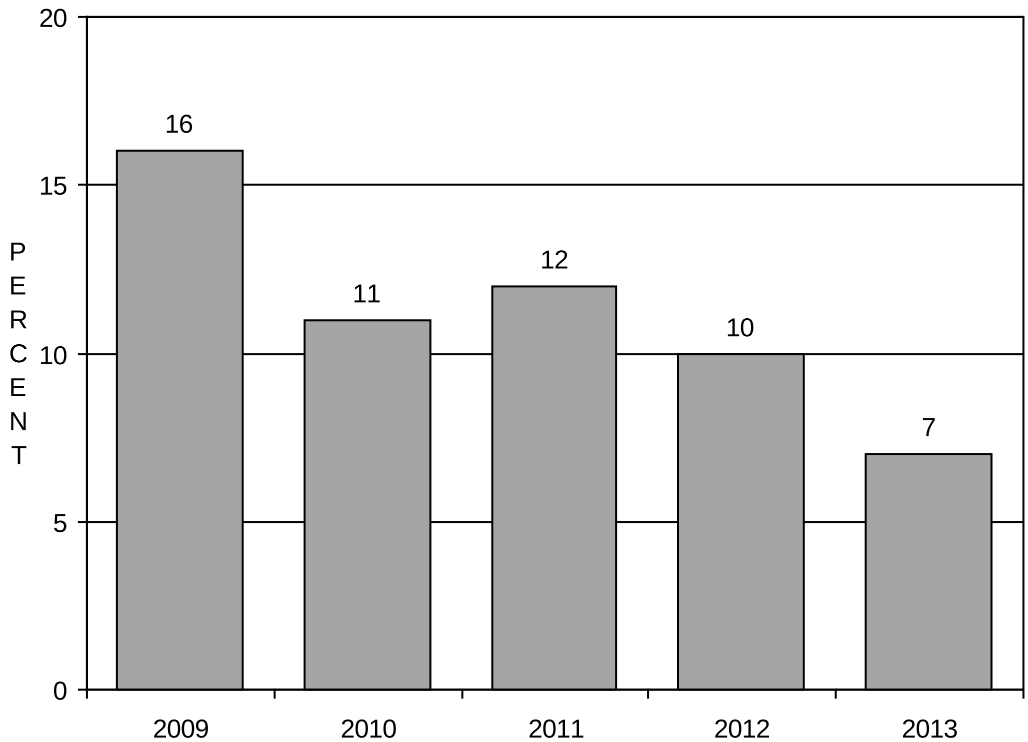
FIGURE 28
Visiting The Las Vegas Strip*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among those who visited or planned to visit Las Vegas on this trip to Laughlin, 74% said they intended to visit the Strip, similar to last year but down significantly from 87% in 2009, 93% in 2010, and 88% in 2011 (Figure 28).

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

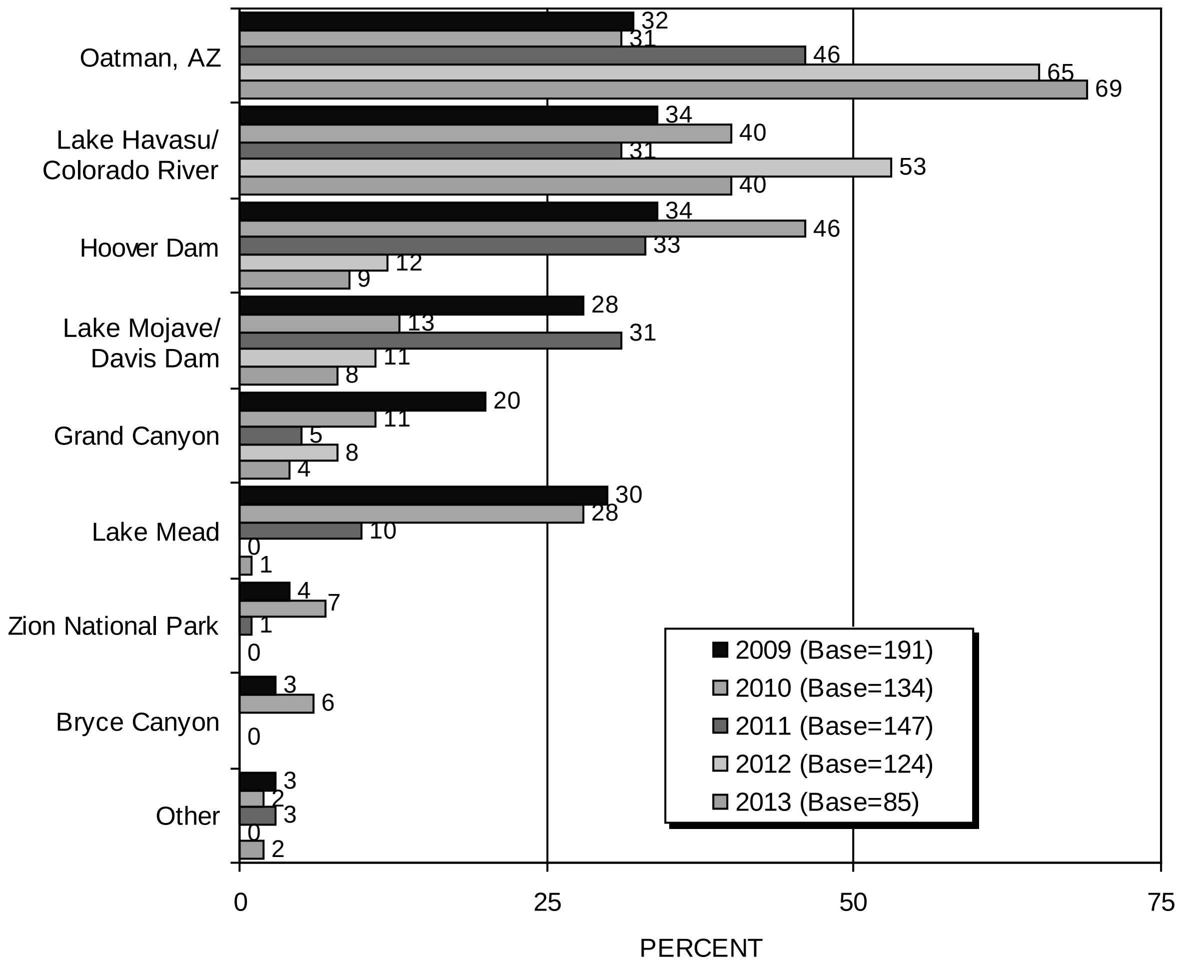
FIGURE 29
Touring Other Nearby Places*
(Among All Visitors)



We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 29) and 7% said yes, down significantly from 2009 – 2012 readings.

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

FIGURE 30
Other Nearby Places Visited*
(Among Those Who Visited Nearby Places)



Laughlin visitors who said they visited nearby places (Figure 30) were most likely to have visited Oatman (69%, up from 32% in 2009, 31% in 2010, and 46% in 2011), followed by the Lake Havasu/Colorado River area (40%). Nine percent (9%) visited Hoover Dam (down from 34% in 2009, 46% in 2010, and 33% in 2011), while 8% visited the Lake Mojave/Davis Dam area (down from 28% in 2009 and 31% in 2011), 4% went to the Grand Canyon (down from 20% in 2009 and 11% in 2010), and 1% visited Lake Mead (down from 30% in 2009, 28% in 2010, and 10% in 2011).

---

* Multiple responses were permitted to this question.

TRIP CHARACTERISTICS AND EXPENDITURES

We asked visitors how many adults (21 years old or older) including themselves were in their immediate party (Figure 31). Eighty-three percent (83%) reported two adults in their party, up significantly from 68% in 2009 but down from 86% in 2010. Eleven percent (11%) said they were traveling alone, a significant increase from 7% in 2009. Seven percent (7%) said they were traveling in a party of three or more people, down from 24% in 2009. The average party size in 2013 was 2.0 persons, down significantly from 2.5 in 2009 but up significantly from 1.9 in 2010.

FIGURE 31
Adults In Immediate Party

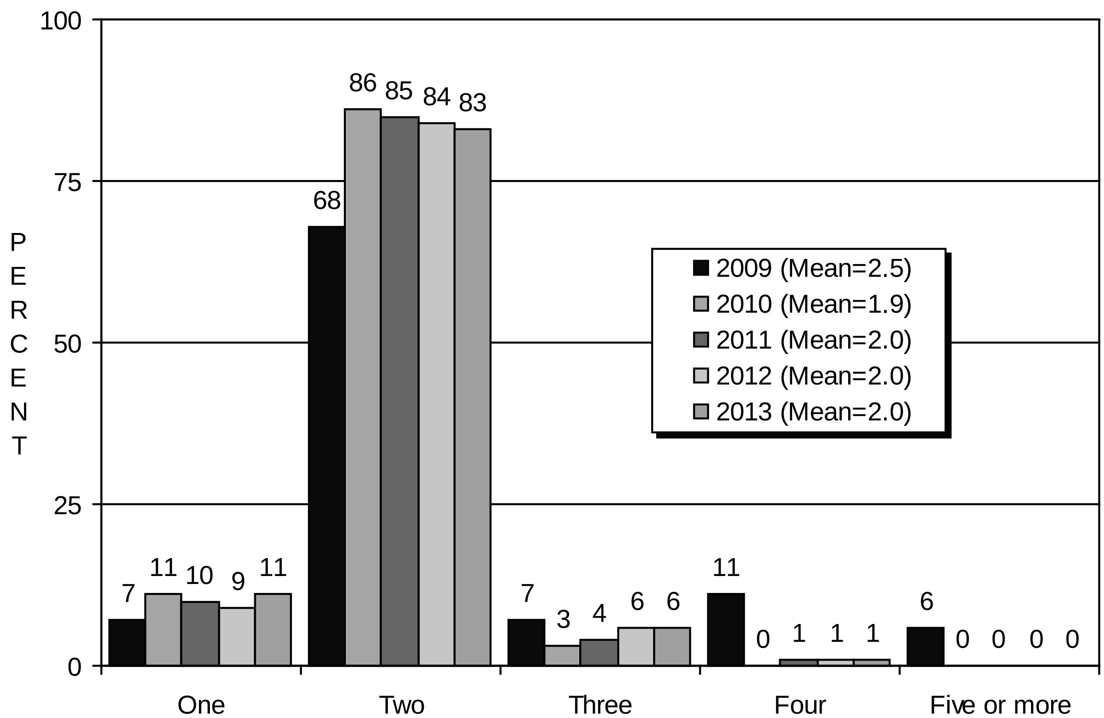
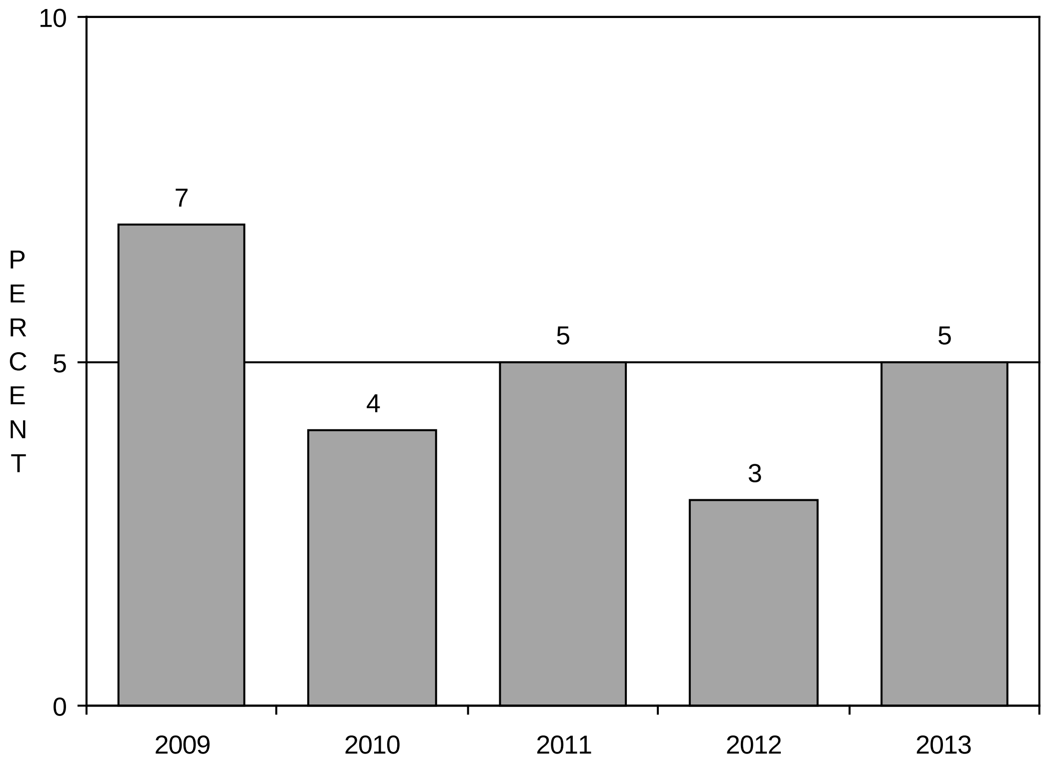


FIGURE 32
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 32). Five percent (5%) said their party included someone under the age of 21, down significantly from 7% in 2009 but up significantly from 3% last year.

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

FIGURE 33
Nights Stayed

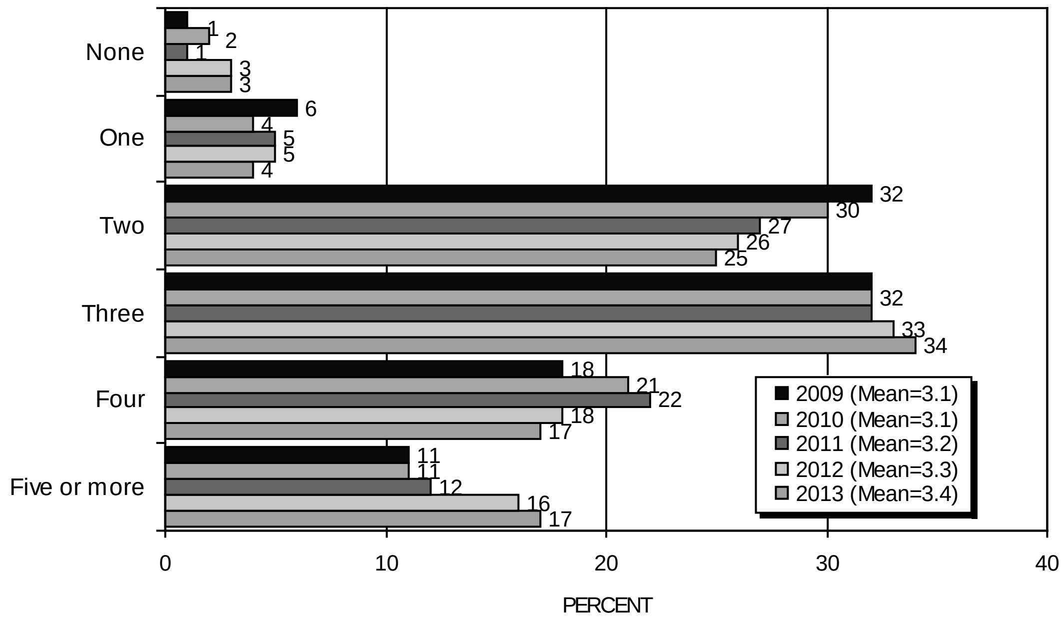
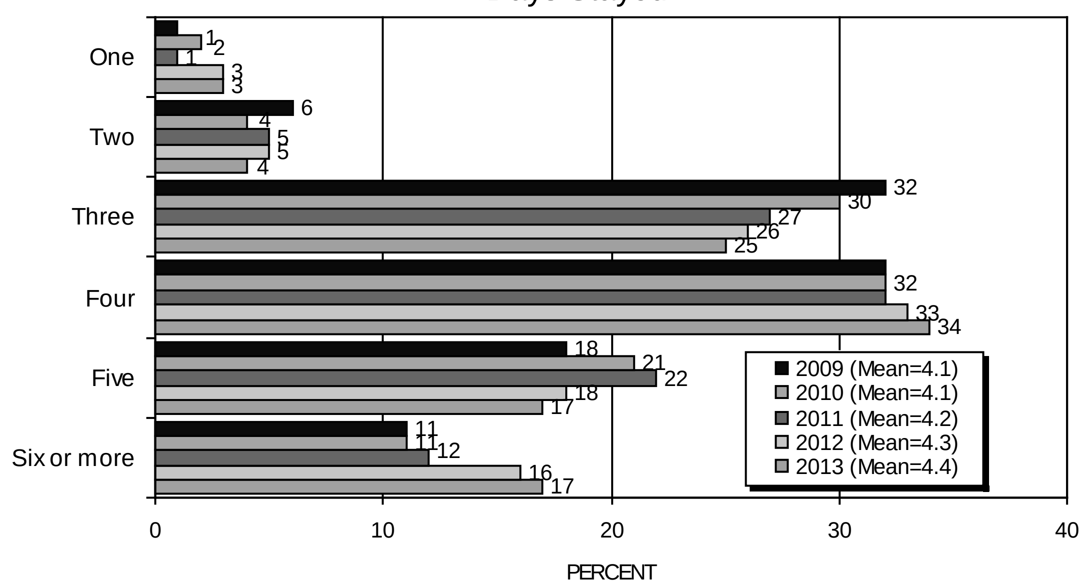
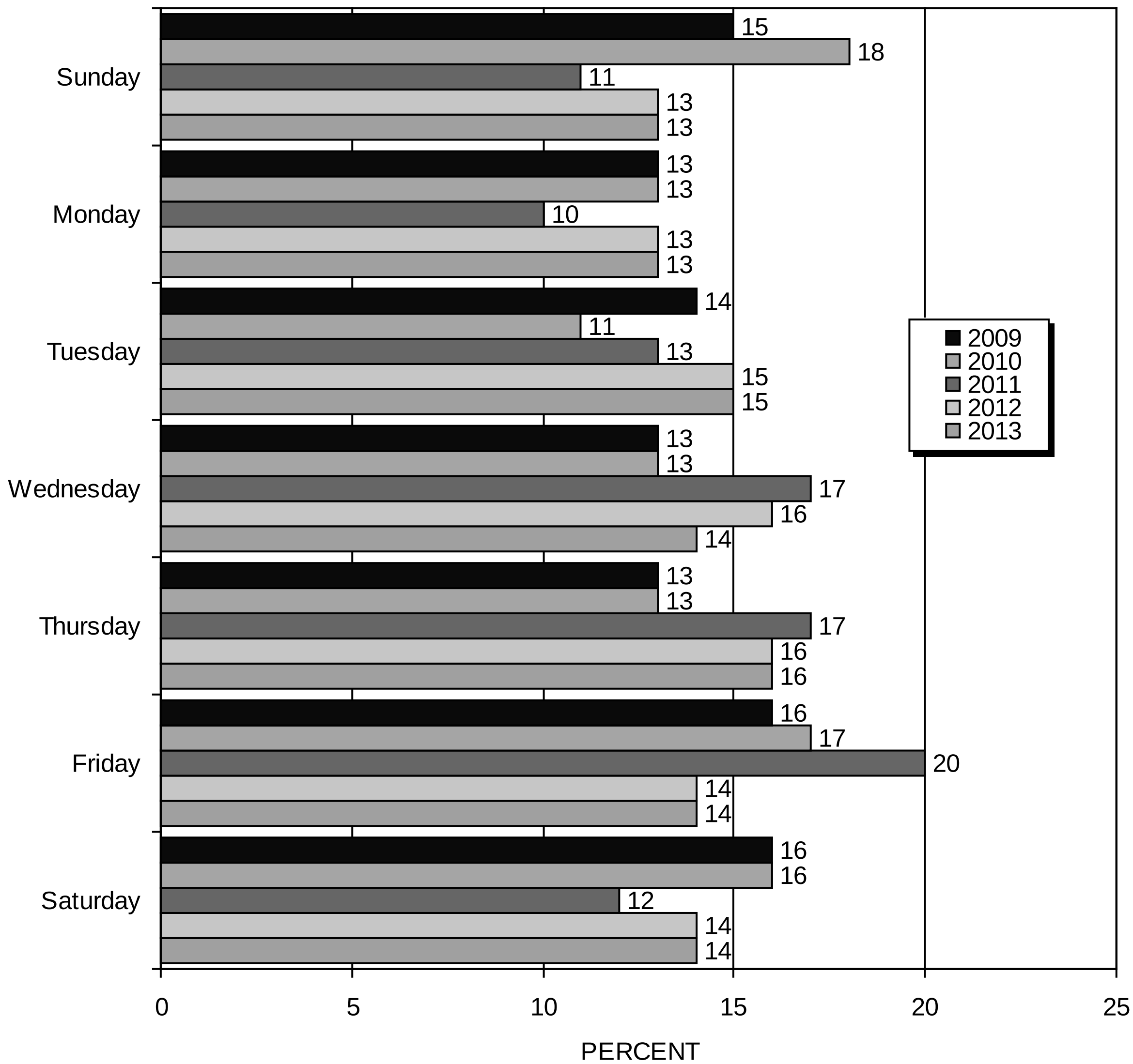


FIGURE 34
Days Stayed



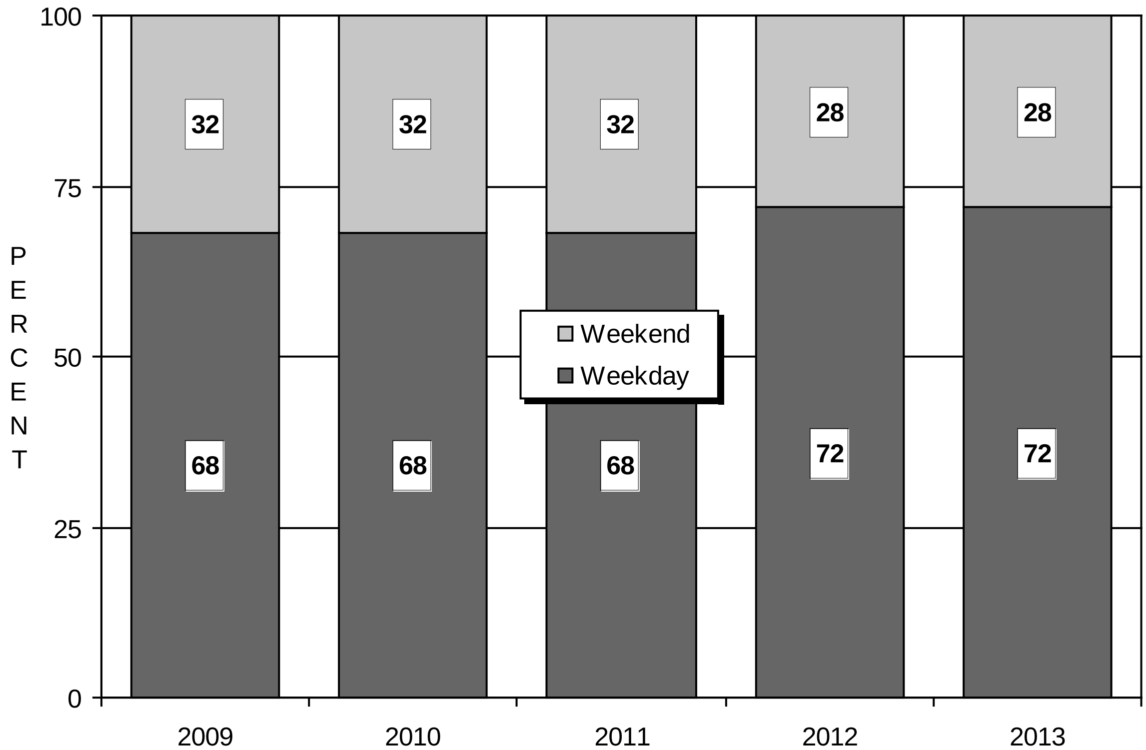
During 2013, Laughlin visitors stayed an average of 3.4 nights and 4.4 days, up significantly from 3.1 nights and 4.1 days in both 2009 and 2010, and 3.2 nights and 4.2 days in 2011 (Figures 33 and 34).

FIGURE 35
Day Of Arrival



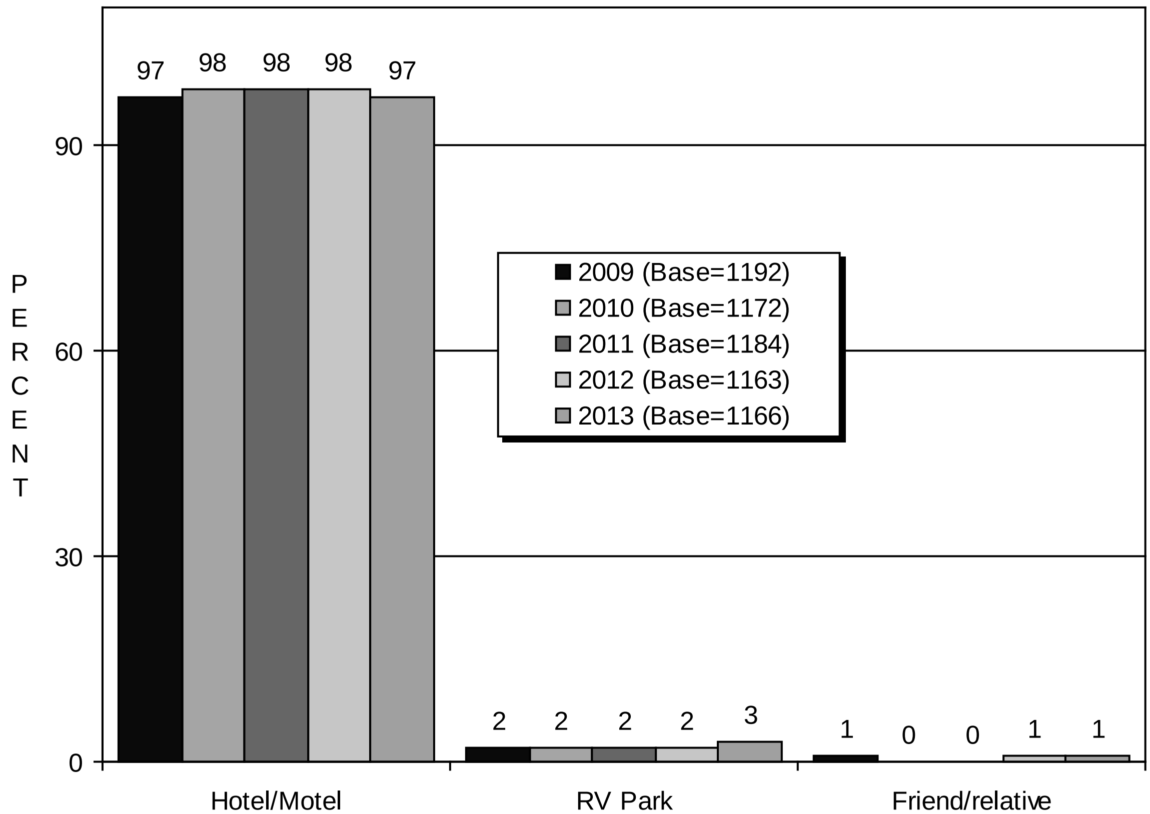
In 2013, visitors were most likely to arrive in Laughlin on a Thursday (16%, up significantly from 13% each in 2009 and 2010), followed by a Tuesday (15%, up from 11% in 2010). Fourteen percent (14%) arrived on a Friday, down significantly from 20% in 2011.

FIGURE 36
Weekend Versus Weekday Arrival



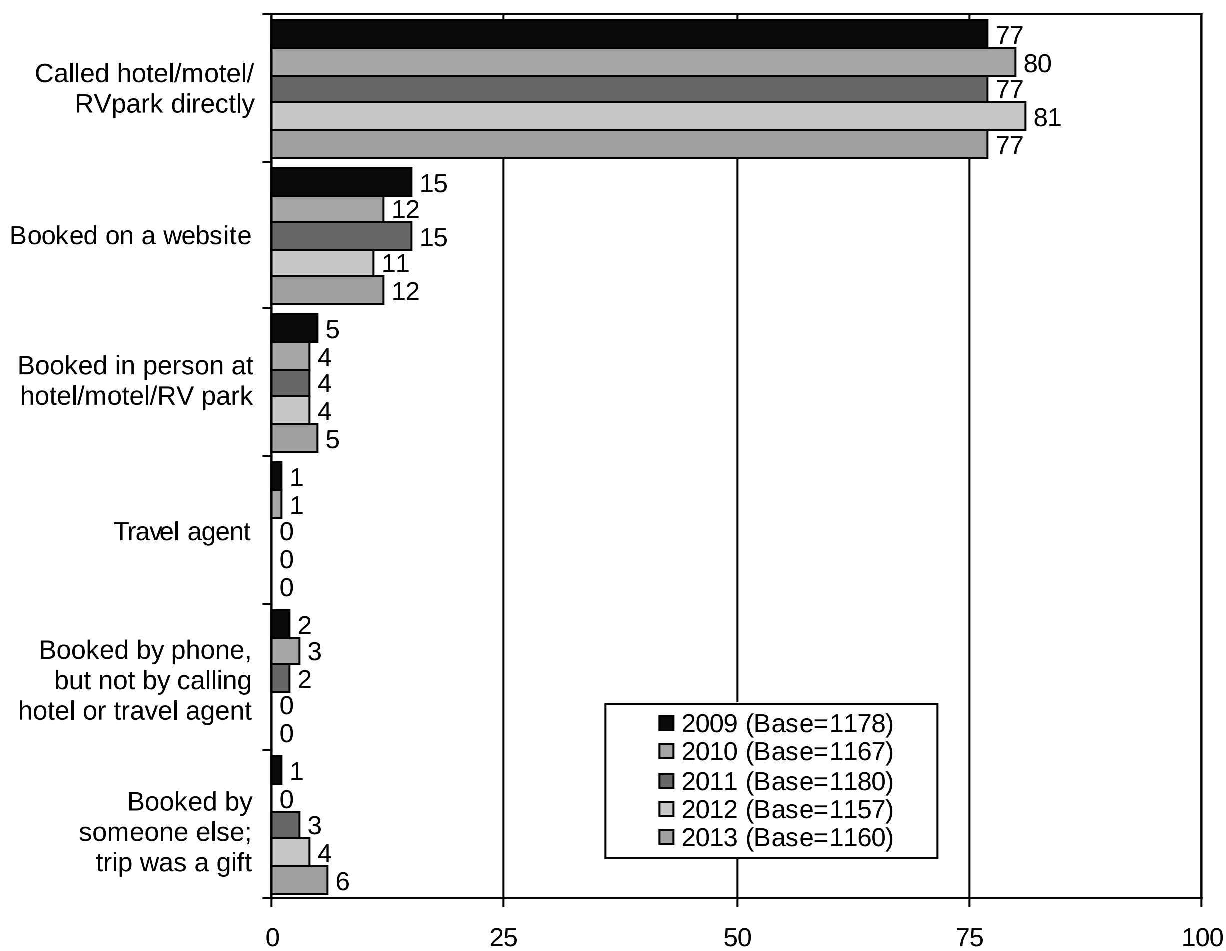
Twenty-eight percent (28%) of visitors arrived in Laughlin on the weekend (Friday or Saturday, while 72% of visitors arrived on a weekday (Sunday through Thursday), not significantly different from past years (Figure 36).

FIGURE 37
Type Of Lodging
(Among Those Who Stayed Overnight)



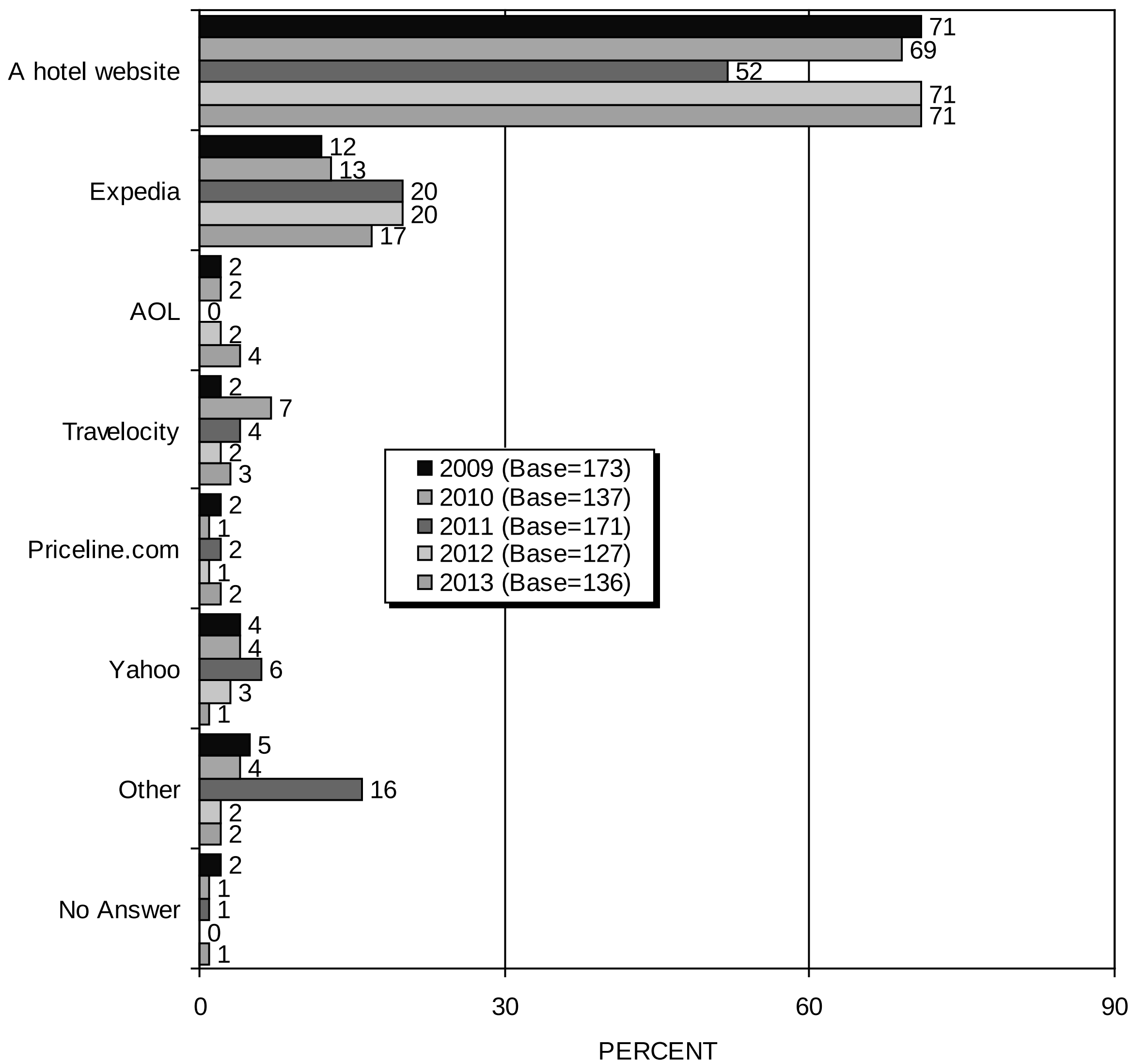
As shown in Figure 37, among visitors who stayed overnight, 97% stayed in a hotel, similar to past years.

FIGURE 38
How Booked Accommodations
(Among Those Who Stayed In Hotel/Motel/RV Park)



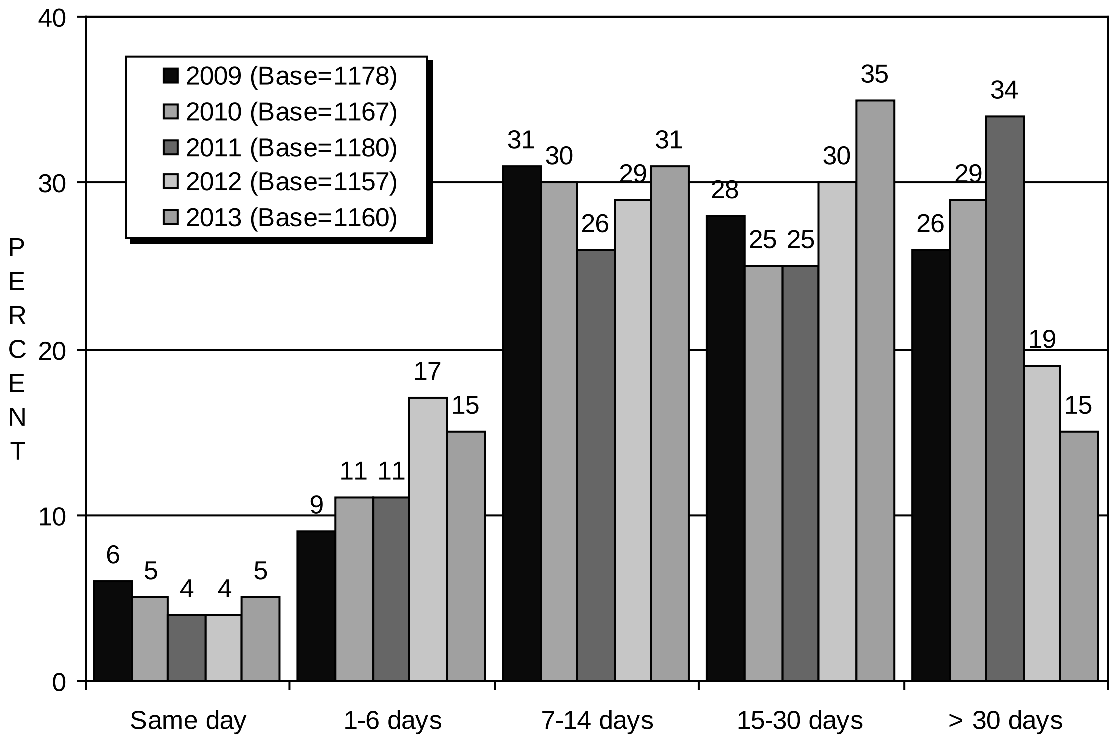
Visitors were asked how they booked their accommodations (Figure 38). In 2013, 77% said they booked their accommodations by calling the property directly (down significantly from 81% last year), while 12% booked on a website (down from 15% each in 2009 and 2011), 6% said someone else booked the trip or the trip was a gift (up from 2009 – 2012), and 5% booked in person.

FIGURE 39
Website Used to Book Accommodations
(Among Those Who Booked Online)



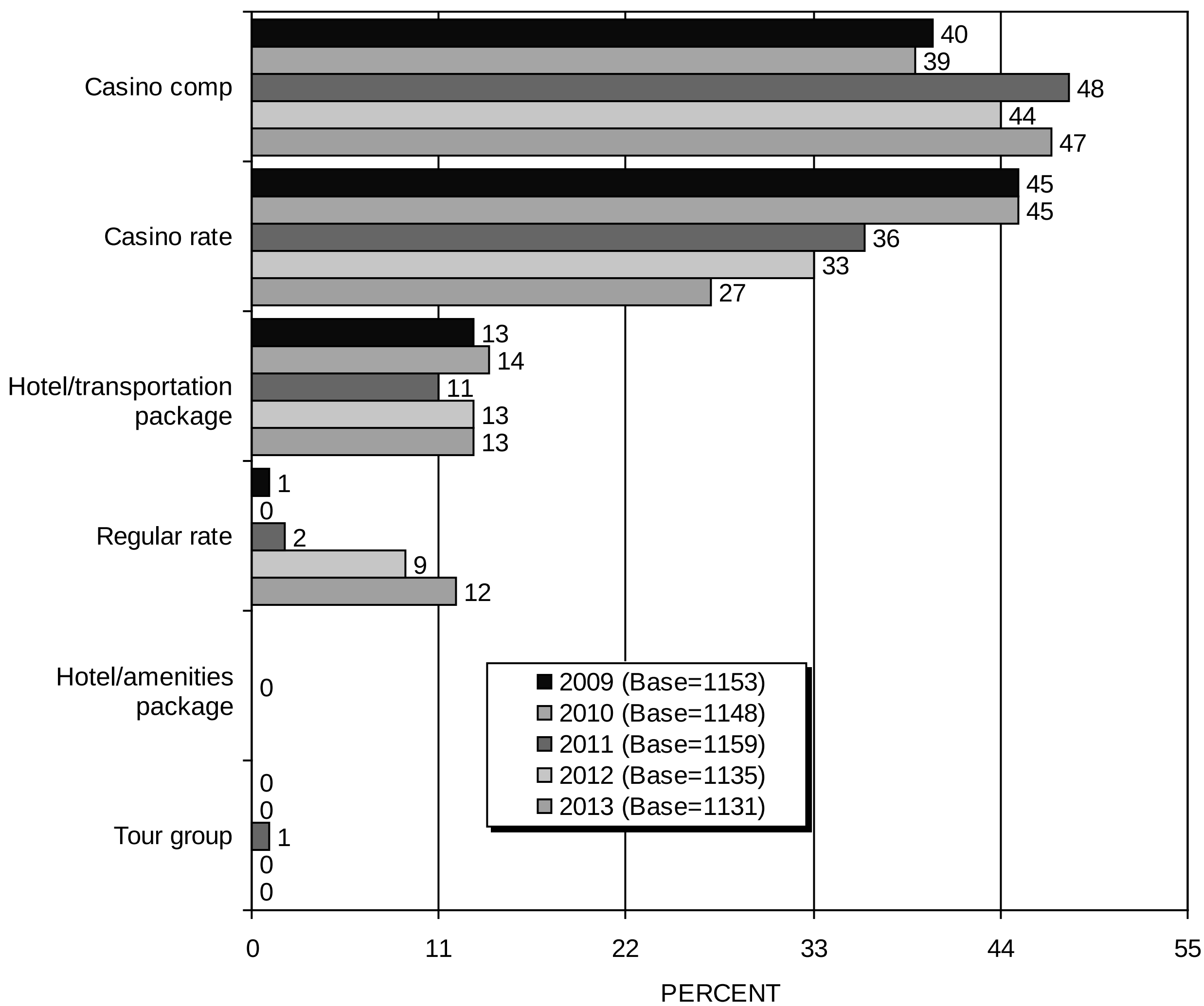
Visitors who booked their accommodations on a website were asked which one they used (Figure 39). Seventy-one percent (71%) said they used a hotel website to book their accommodations, up significantly from 52% in 2011. Seventeen percent (17%) used Expedia, 4% used AOL, 3% used Travelocity, 2% used Priceline, and 1% used Yahoo (down significantly from 6% in 2011).

FIGURE 40
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 40). Five percent (5%) of visitors booked accommodations the same day they arrived in Las Vegas, 15% booked one to six days in advance (up from 9% in 2009 and 11% each in 2010 and 2011), 66% booked seven to 30 days in advance (up from 59% each in 2009 and 2012, 55% in 2010, and 51% in 2011), and 15% booked more than 30 days in advance (down from 2009 – 2012).

FIGURE 41
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 41). Nearly three-quarters (74%) reported receiving some type of casino rate – either a regular casino rate (27%, down from 45% each in 2009 and 2010, 36% in 2011, and 33% last year) or a casino complimentary rate (47%, up from 40% in 2009 and 39% in 2010). Thirteen percent (13%) received a hotel-transportation package. Twelve percent (12%) said they received a regular room rate, up from 2009 – 2012 readings.

FIGURE 43
Room Rate By Booking Method
(2013)

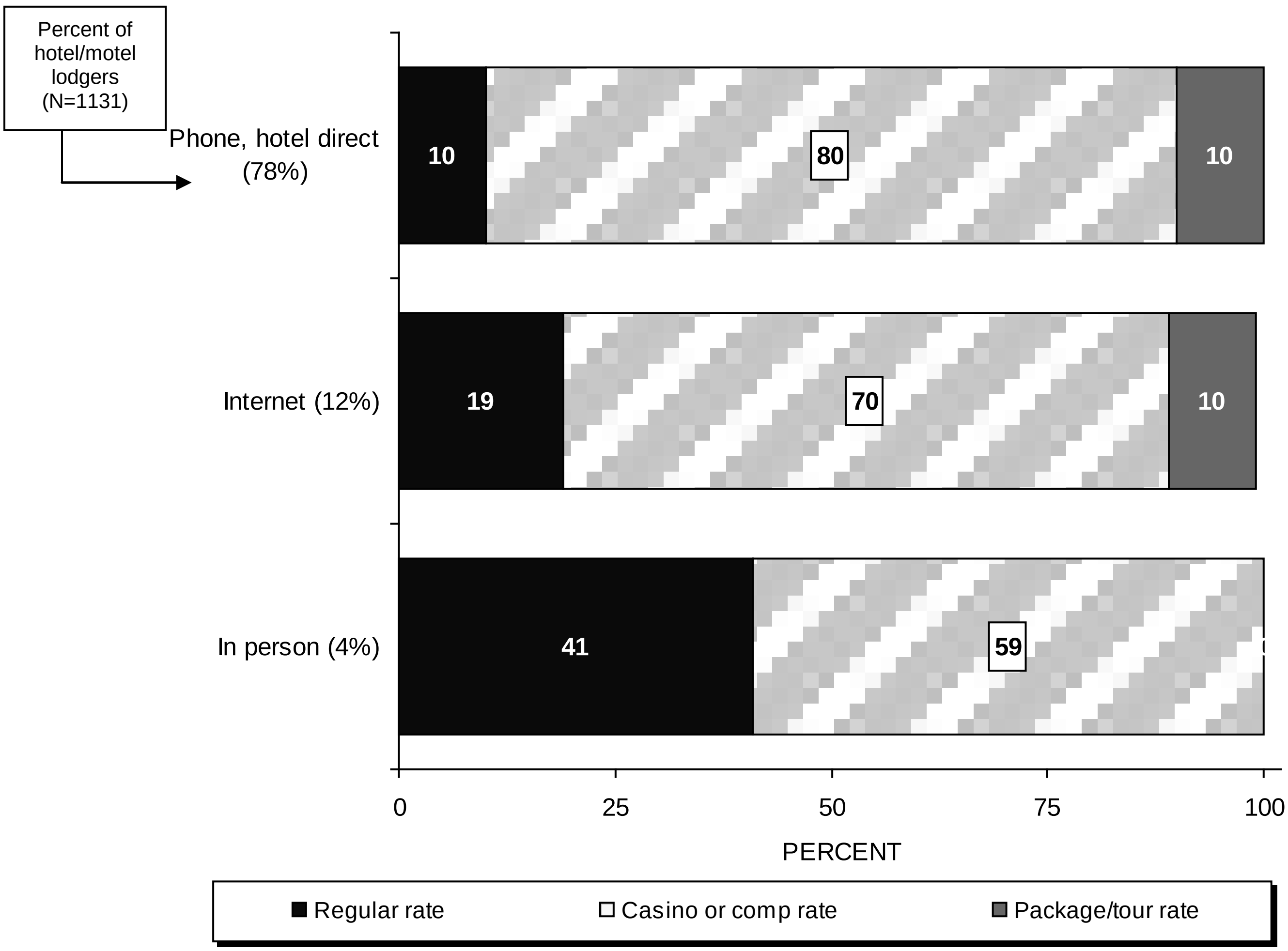
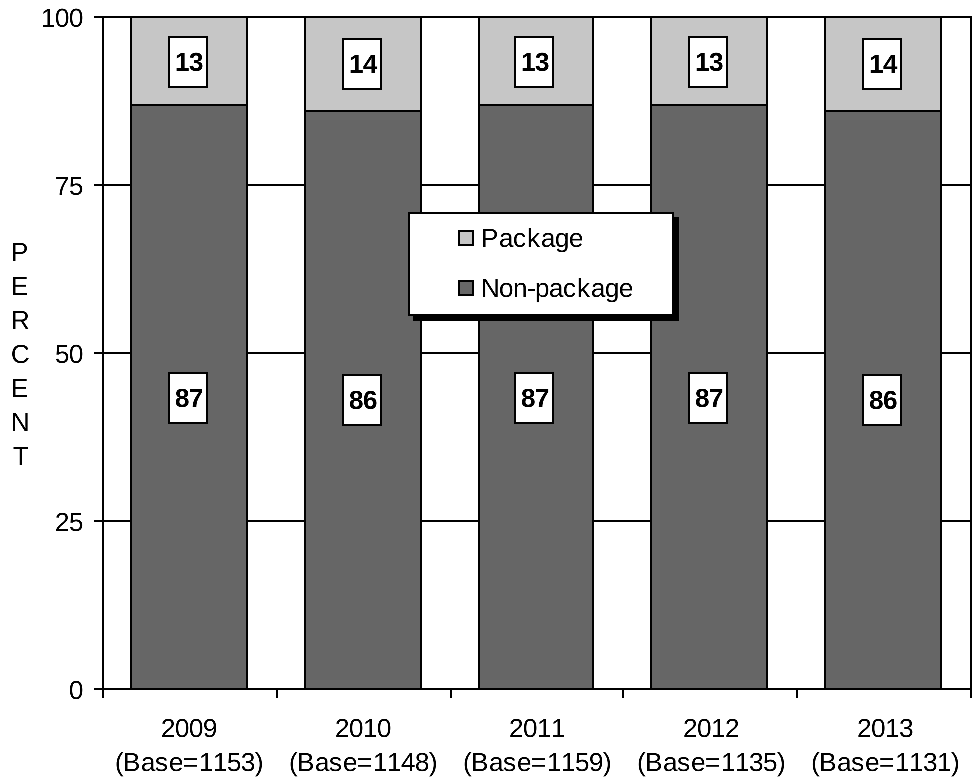


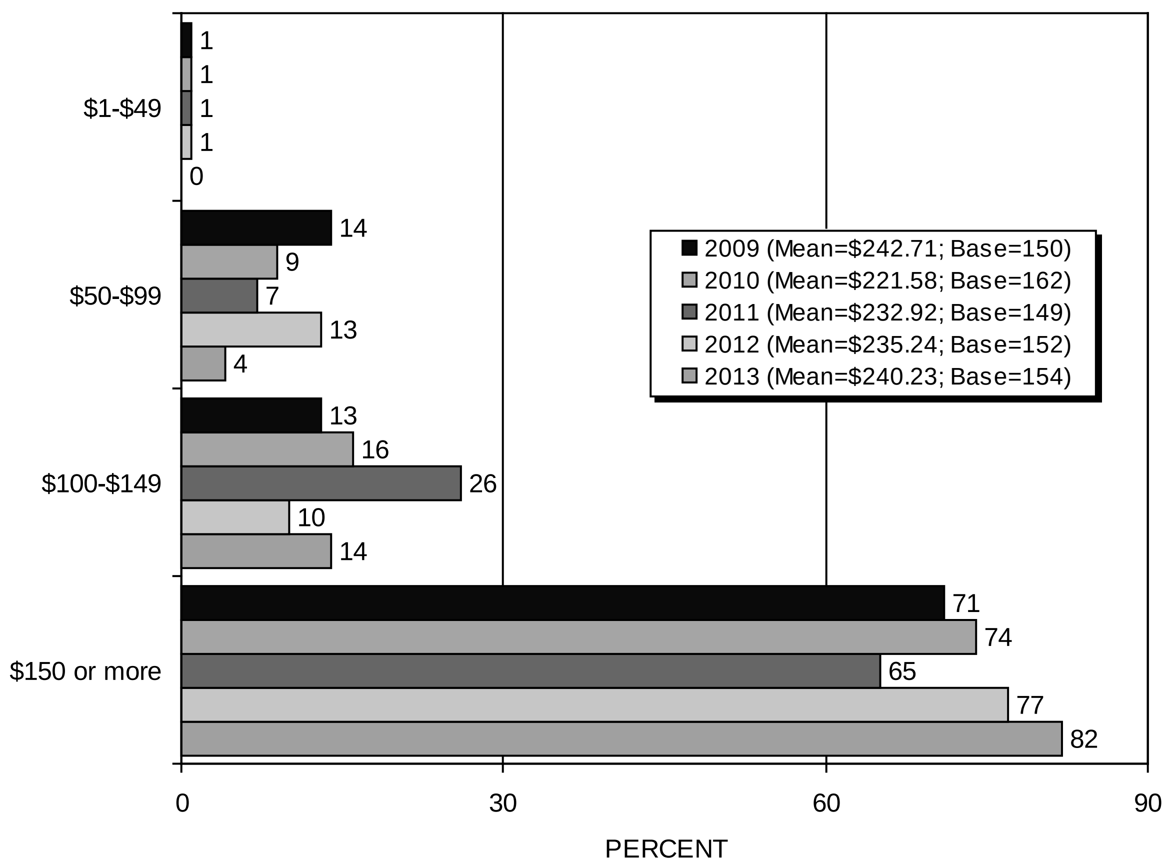
Figure 43 shows the room rate category by the booking method for 2013 among those staying in a hotel or motel. Of those who called the hotel directly, eight in ten (80%) received a casino or casino complimentary rate, while 10% received a package or tour rate, and the remaining 10% a regular room rate. Of those who booked on the Internet, seven in ten (70%) received a casino or casino complimentary rate, while 19% received a regular rate and 10% a package or tour rate. Of those who booked in person, nearly six in ten (59%) received a casino or casino complimentary rate, while four in ten (41%) received a regular room rate.

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



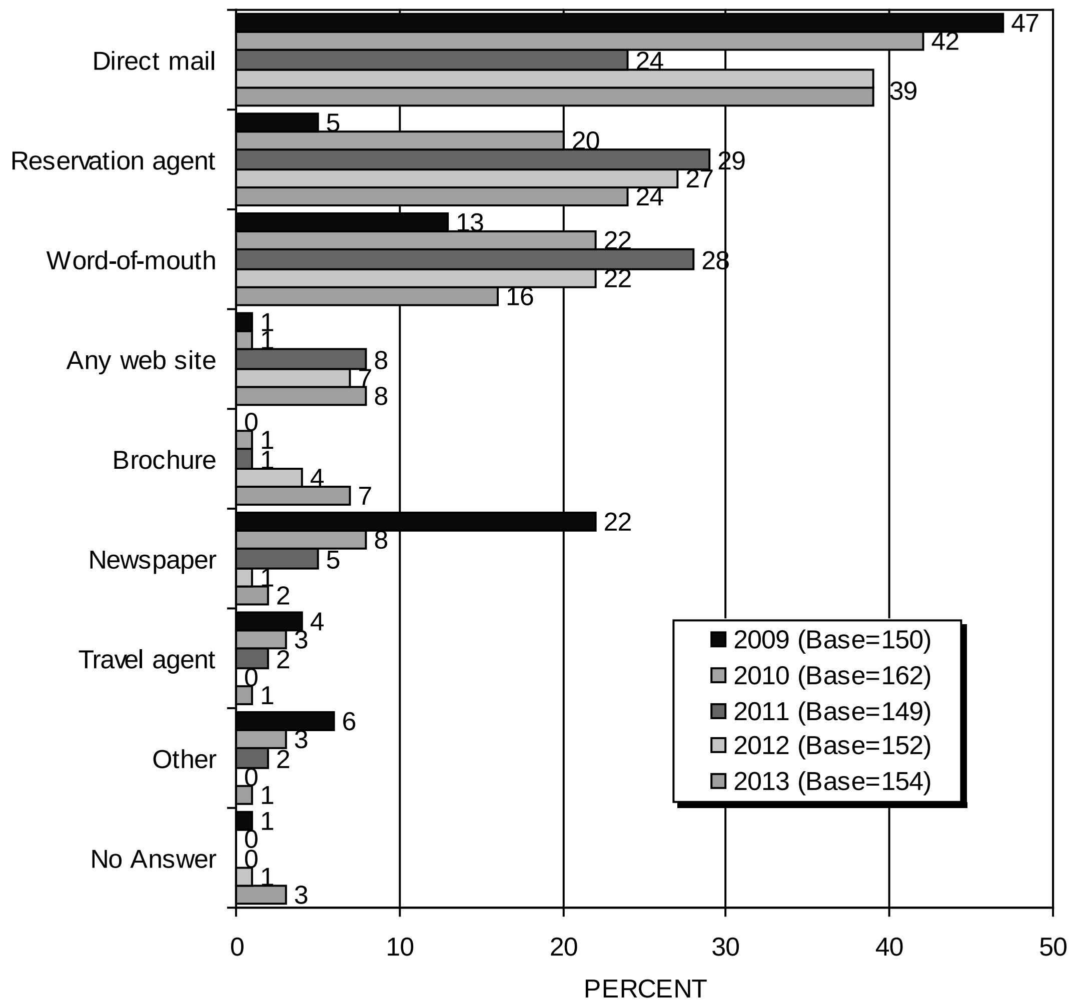
In 2013, 14% received their lodging as part of a package deal (13% a hotel/transportation package and less than 1% each either a hotel/amenities package or a tour group package), not significantly different from past years (Figure 44).

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



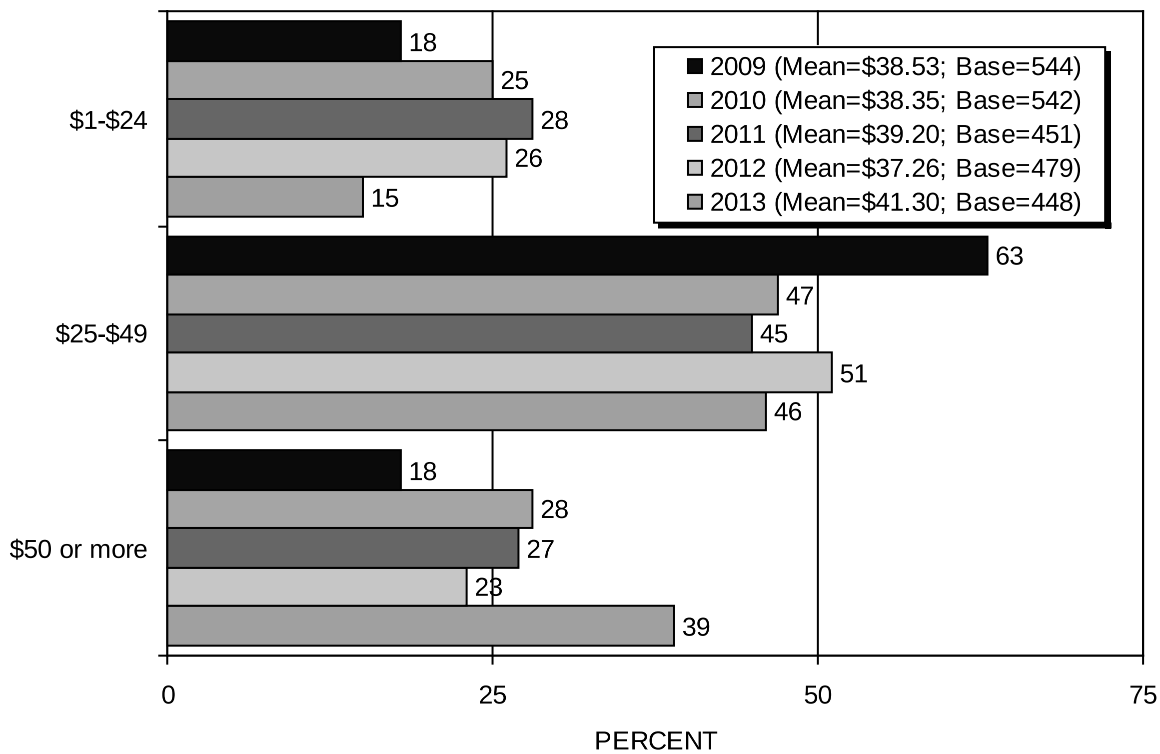
We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 45). More than eight in ten (82%) said they paid $150 or more for their package, up significantly from 71% in 2009 and 65% in 2011. Fourteen percent (14%) paid $100 to $149 (down from 26% in 2011), 4% paid less than $100 (down significantly from 15% in 2009 and 14% last year). The average package cost was $240.23, not significantly different from the 2009 to 2012 averages.

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



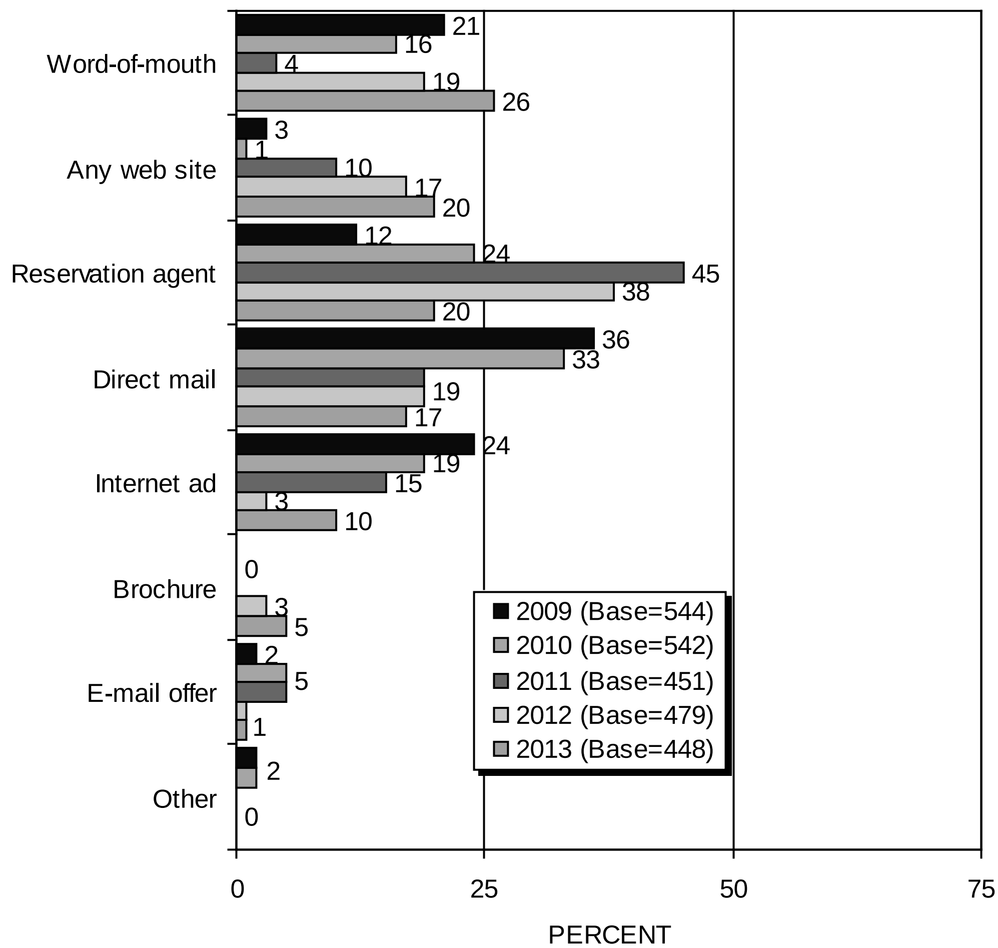
Package purchasers were asked how they first found out about the package they bought for their trip to Laughlin (Figure 46). Nearly four in ten (39%) said they received an offer through the mail (up significantly from 24% in 2011), 24% heard about the package through a reservation agent or call center (up from 5% in 2009), and 16% said they first heard about the offer through word-of-mouth (down from 28% in 2011). Eight percent (8%) said they first found out about their package through a web site (up from 1% each in 2009 and 2010), 7% found out through a brochure (up from 1% each in 2010 and 2011), and 2% saw something in the newspaper (down from 22% in 2009 and 8% in 2010).

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



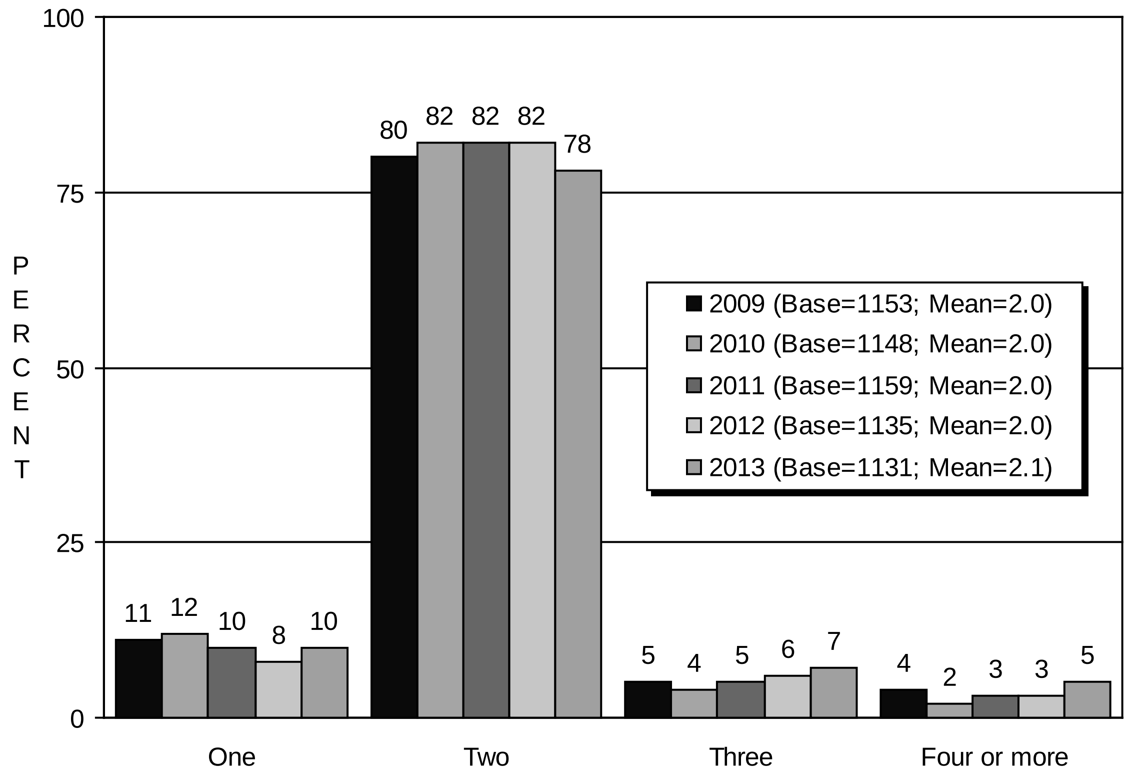
The average reported room cost among non-package hotel and motel lodgers in 2013 was $41.30, significantly higher than the averages of $38.53 in 2009, $38.35 in 2010, and $37.26 last year (Figure 47). Nearly four in ten (39%) reported spending $50 or more on their lodgings, up significantly from 18% in 2009, 28% in 2010, 27% in 2010, and 23% last year. Forty-six percent (46%) spent between $25 and $49, down from 63% in 2009. The remaining 15% reported spending less than $50, down from 25% in 2010, 28% in 2011, and 26% last year.

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



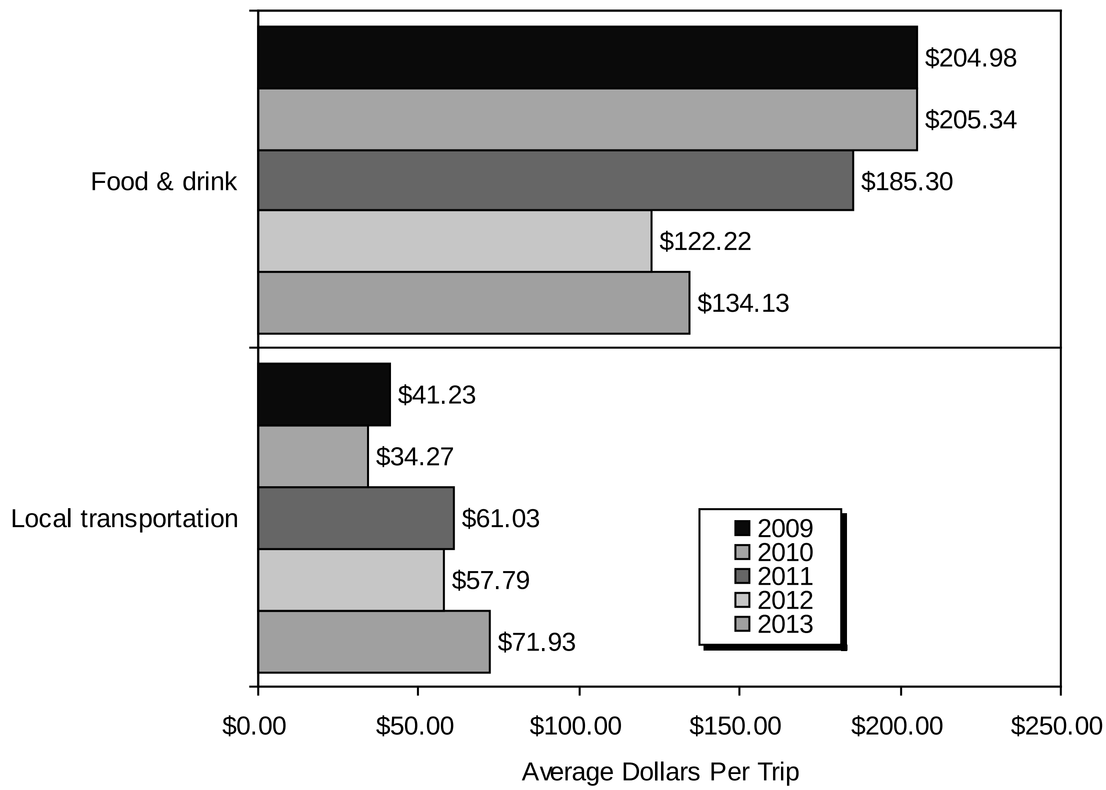
Non-package hotel and motel lodgers were asked how they first found out about the room rate they paid (Figure 48). Twenty-six percent (26%) said they first heard of their room rate through word of mouth, a significant increase from 2009 – 2012 readings. Twenty percent (20%) said they heard about their room rate from a reservation agent or through a call center, up from 12% in 2009 but down from 45% in 2011 and 38% in 2012. Another 20% said they learned about it on a website (up from 3% in 2009, 1% in 2010, and 10% in 2011), while 17% received an offer in the mail (down from 36% in 2009 and 33% in 2010). Ten percent (10%) said they saw an online ad for the room rate (up from 3% last year but down from 24% in 2009, 19% in 2010, and 15% in 2011), while 5% discovered it in a brochure (up from less than 1% each in 2009 – 2011), and 1% learned about it through an e-mail offer (down from 5% each in 2010 and 2011).

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



As Figure 49 shows, the majority of visitors (78%) said that two people stayed in their room (down significantly from 82% each from 2010 – 2012). Twelve percent (12%) said that three or more people stayed in their room (up significantly from 9% in 2009, 6%, in 2010, and 8% in 2011). The average number of room occupants per hotel/motel room was 2.1 occupants, up from 2.0 each from 2009 – 2012.

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



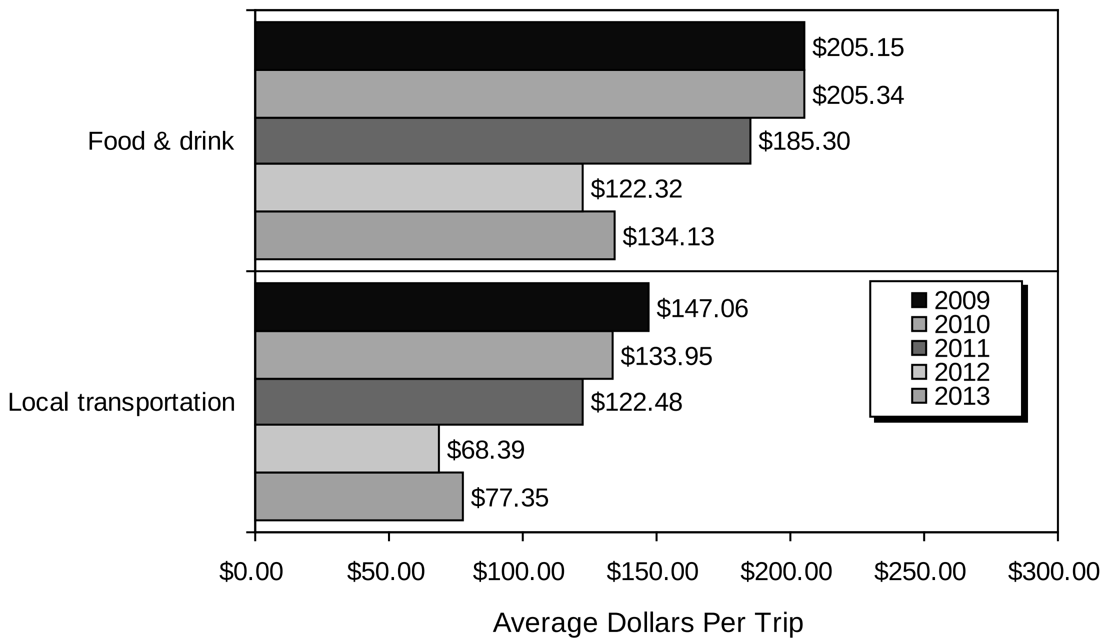
We asked all visitors about their daily expenditures on food and drink and on local transportation.

Figure 50 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In 2013, the average food and drink expenditures were $134.13 per trip, up significantly from $122.22 last year, but down significantly from 2009 – 2011. The average local transportation expenditures were $71.93 per trip, up significantly from 2009 – 2012.

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

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)



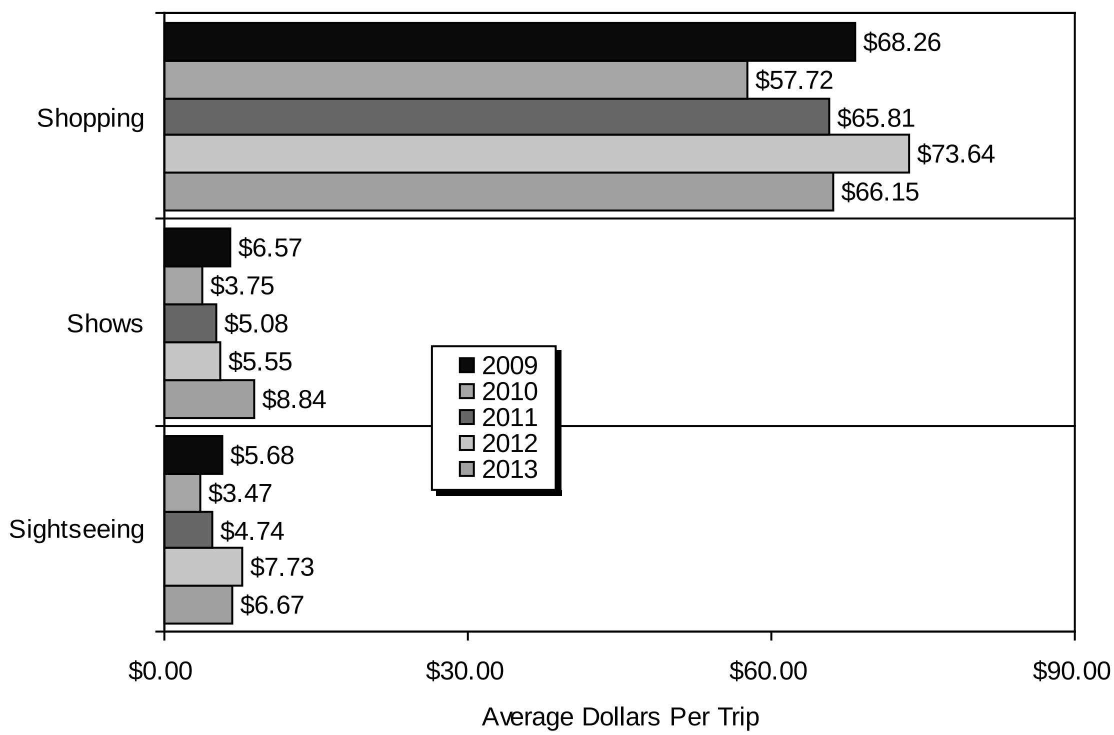
Among visitors who indicated they spent money in these categories, average food and drink expenditures in 2013 were $134.313 per trip, up significantly from $122.32 last year, but down from 2009 – 2011 readings (Figure 51). Average local transportation expenditures were $77.35 per trip, also up significantly from $68.39 last year, but down significantly from 2009 – 2011.

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

	2009	2010	2011	2012	2013
Food and drink					
Base size	(1199)	(1200)	(1200)	(1199)	(1200)
Proportion of total	99.9%	100%	100%	100%	100%
Local transportation					
Base size	(340)	(307)	(598)	(1014)	(1116)
Proportion of total	28%	26%	50%	85%	93%

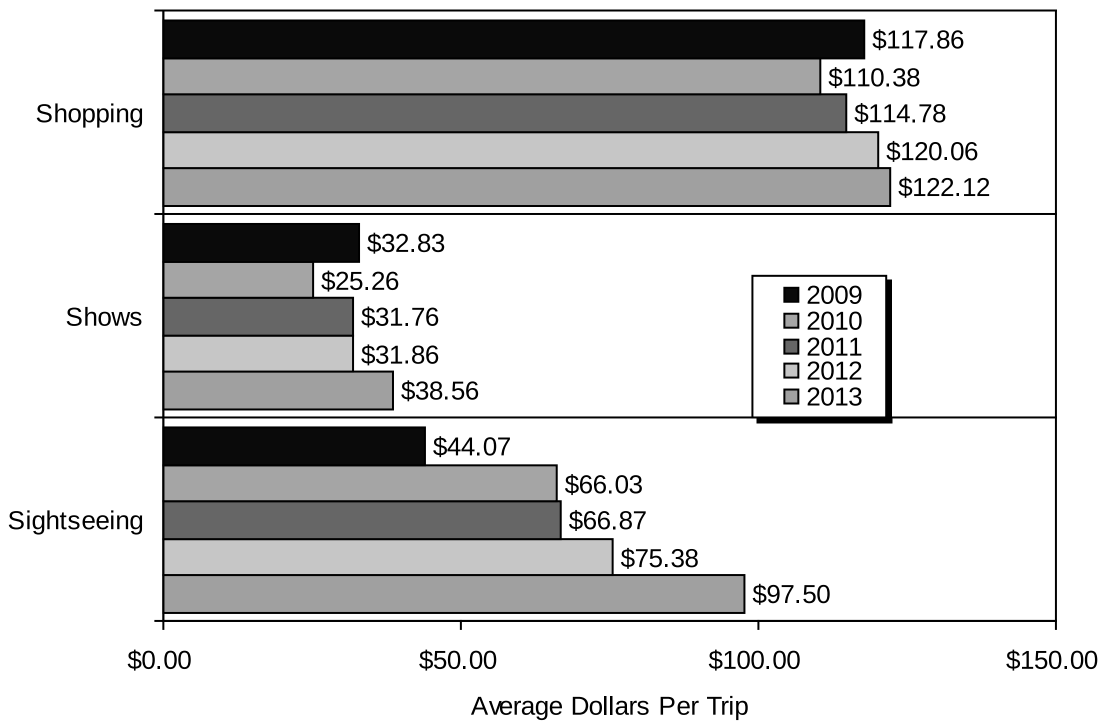
* Local transportation expenditures include spending in both Laughlin and Bullhead City.

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 2013 was $66.15, up significantly from $57.72 in 2010. An average of $8.84 was spent on shows (up significantly from 2009 – 2012), and an average of $6.67 was spent on sightseeing (up from $3.47 in 2010).

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 2013 was $122.12, up significantly from $110.38 in 2010 (Figure 53). The average spent on shows was $38.56, up significantly 2009 – 2012 readings. The average spent on sightseeing was $97.50, also up significantly from 2009 – 2012 readings.

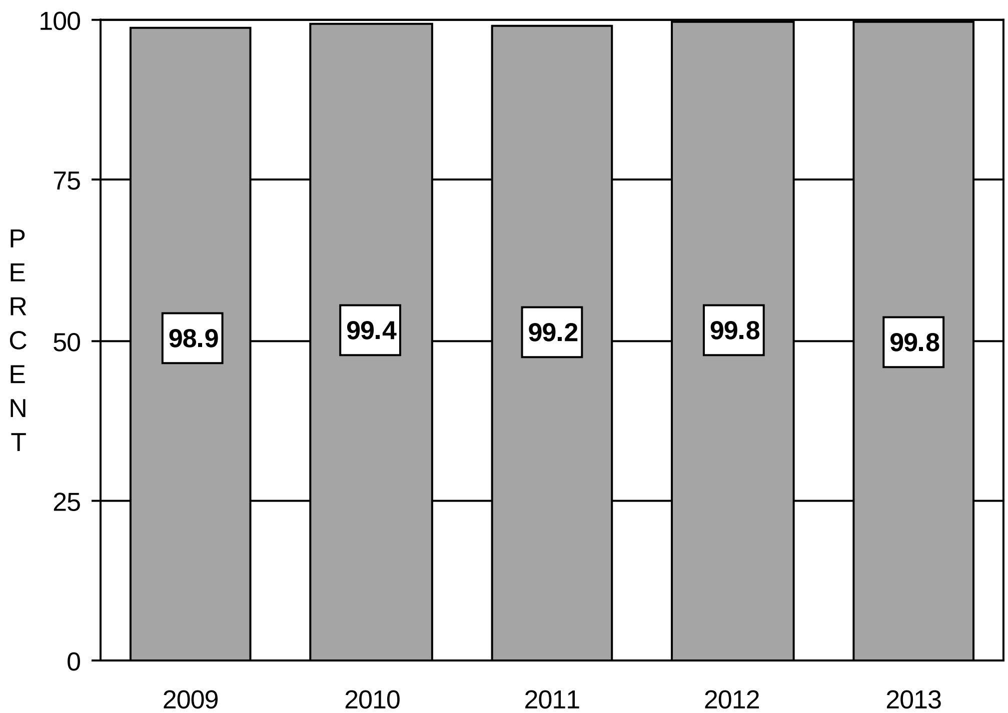
Percentages of visitors who spent money in each category are shown in the following table:

	2009	2010	2011	2012	2013
Shopping					
Base size	(695)	(628)	(688)	(736)	(650)
Proportion of total	58%	52%	57%	61%	61%
Shows					
Base size	(240)	(178)	(192)	(209)	(275)
Proportion of total	20%	15%	16%	17%	17%
Sightseeing					
Base size	(165)	(63)	(85)	(123)	(83)
Proportion of total	14%	5%	7%	10%	10%

GAMING BEHAVIOR AND BUDGETS

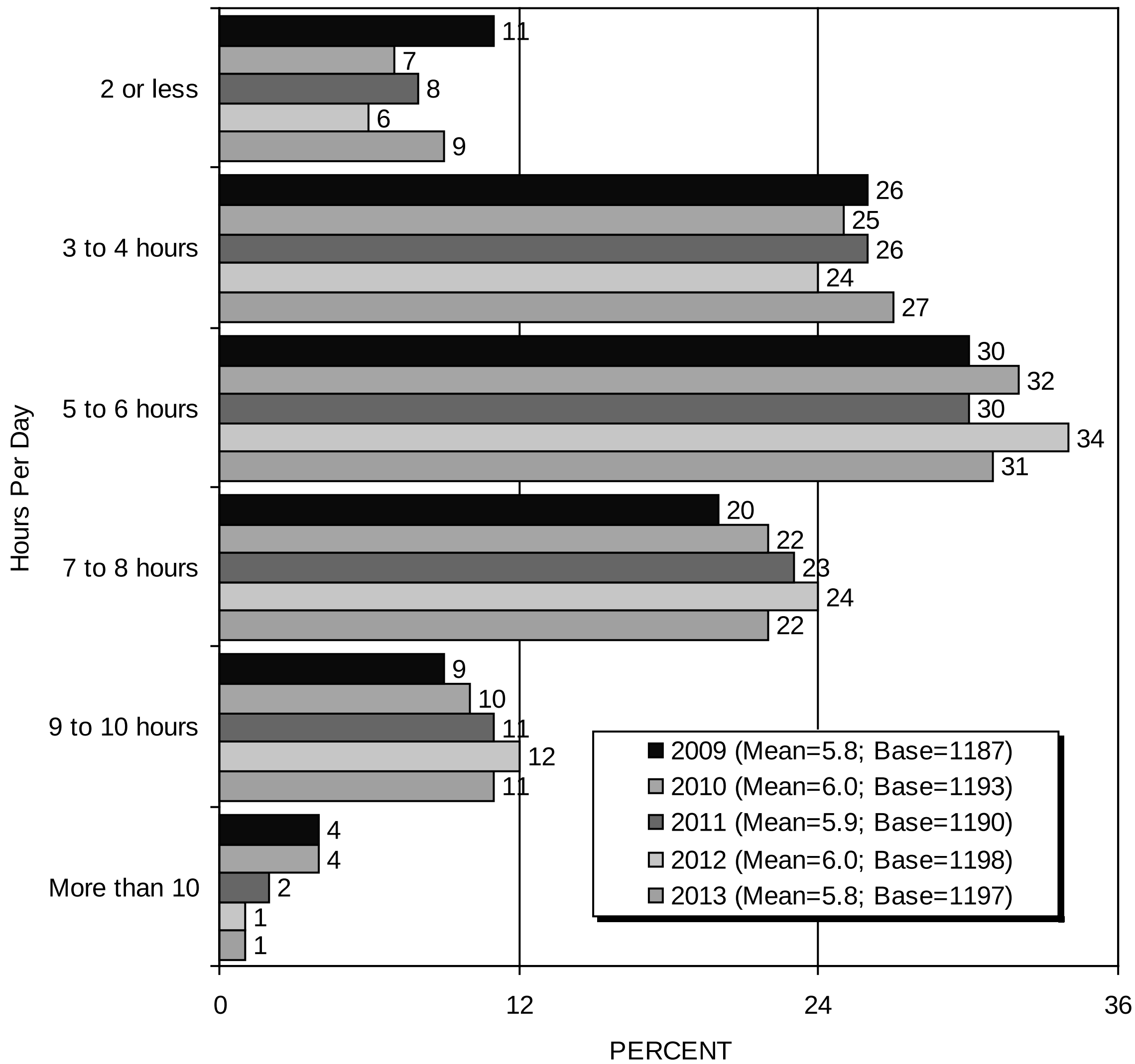
Nearly all Laughlin visitors in the current study (99.8%, up significantly from 98.9% in 2009) said they gambled during their visit (Figure 54).

FIGURE 54
Whether Gambled While In Laughlin*



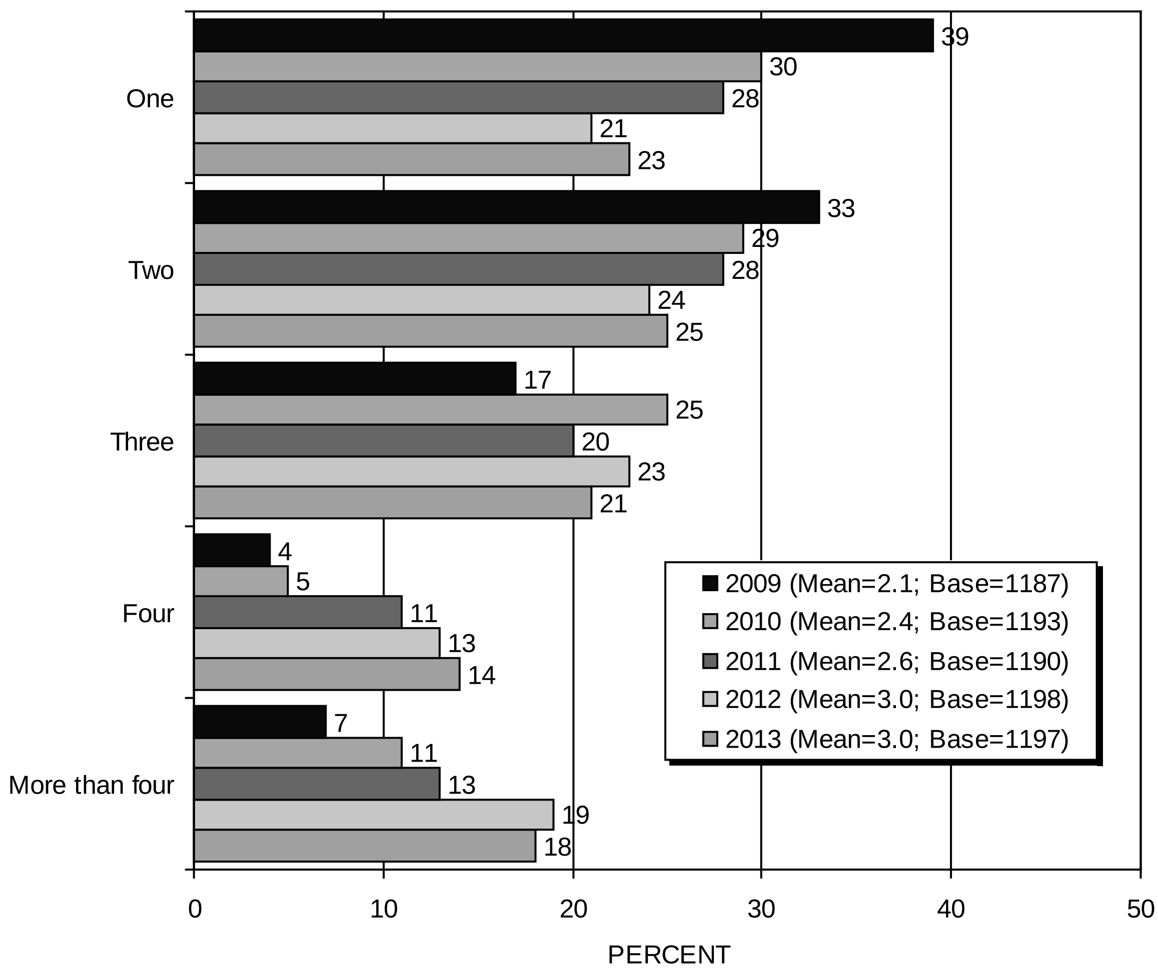
* Only “yes” responses are reported in this chart.

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



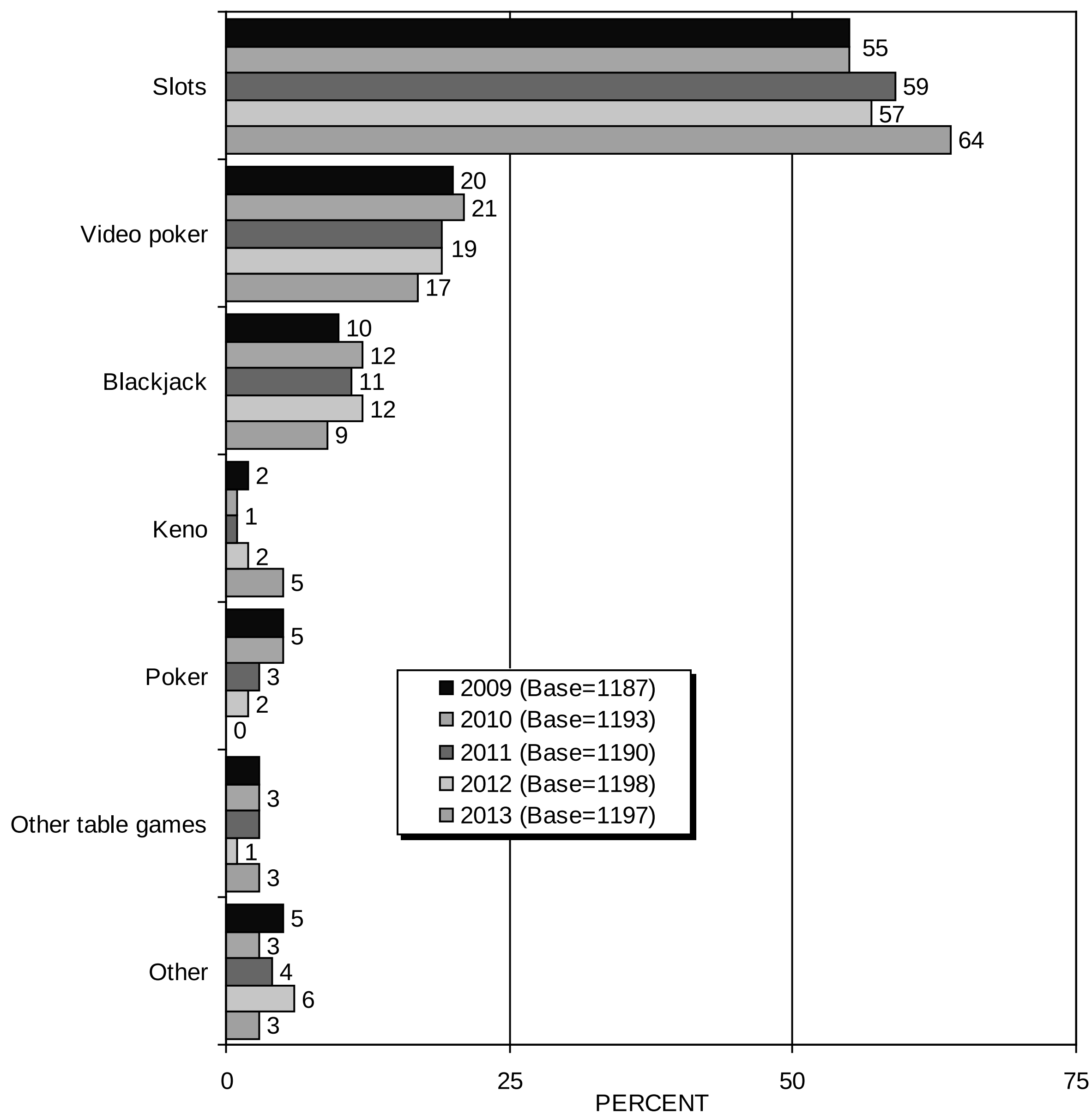
In 2013, Laughlin visitors who gambled said they spent an average of 5.8 hours doing so, down from the average of 6.0 hours each in 2010 and 2012 (Figure 55). Nine percent (9%) said they gambled two hours or less, down from 11% in 2009. One percent (1%) gambled more than 10 hours, down from 4% each in 2009 and 2010, and 2% in 2011.

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



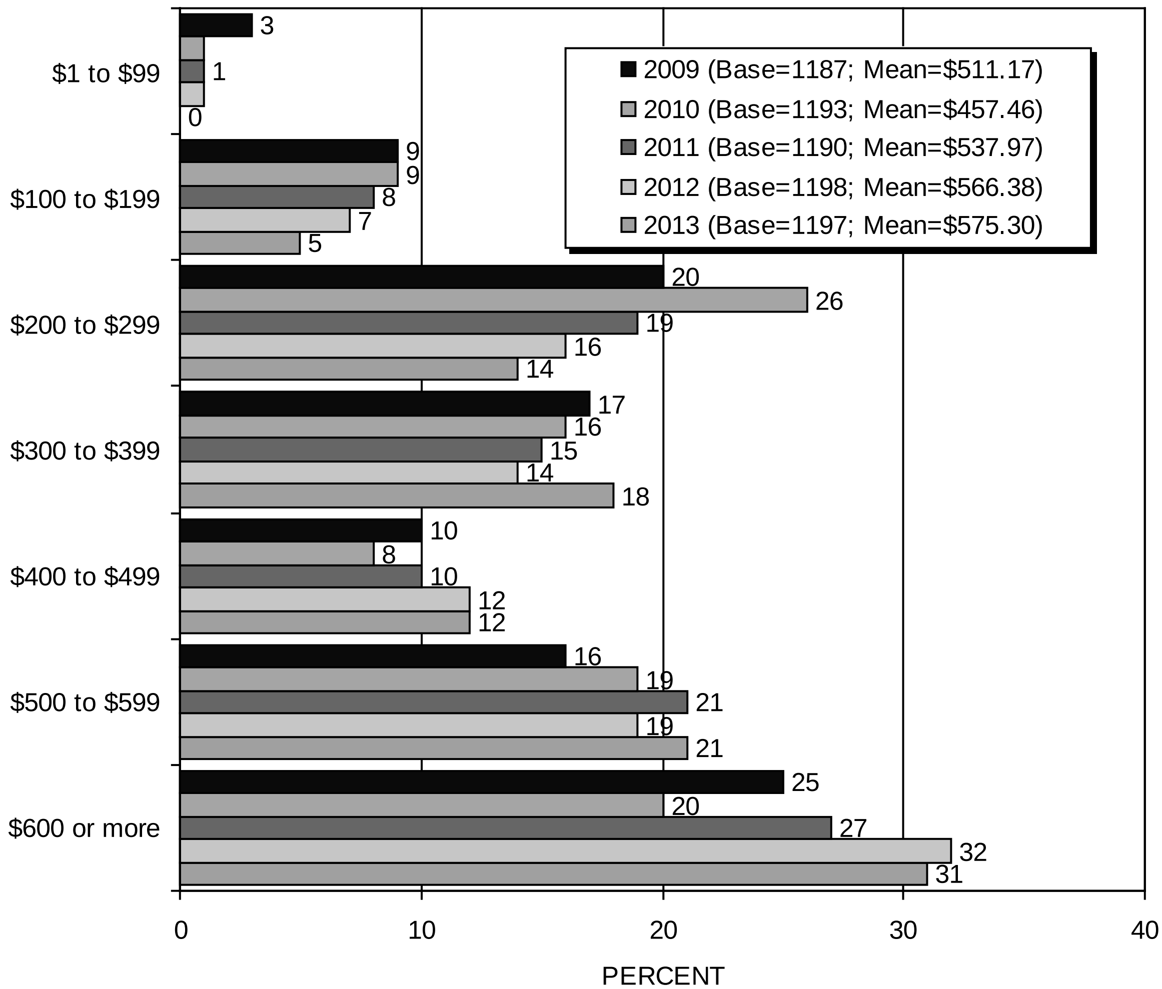
In 2013, gamblers reported gambling at an average of 3.0 casinos during their stay in Laughlin, a significant increase from 2009 – 2011 (Figure 56). Twenty-three percent (23%) reported gambling at only one casino (down significantly from 39% in 2009, 30% in 2010, and 28% in 2011), and 25% reported gambling in two casinos (down from 33% in 2009 and 29% in 2010). Fourteen percent (14%) gambled in four casinos (up significantly from 2009 – 2011), while 18% reported gambling at four or more casinos (up from 7% in 2009, 11% in 2010, and 13% in 2011).

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



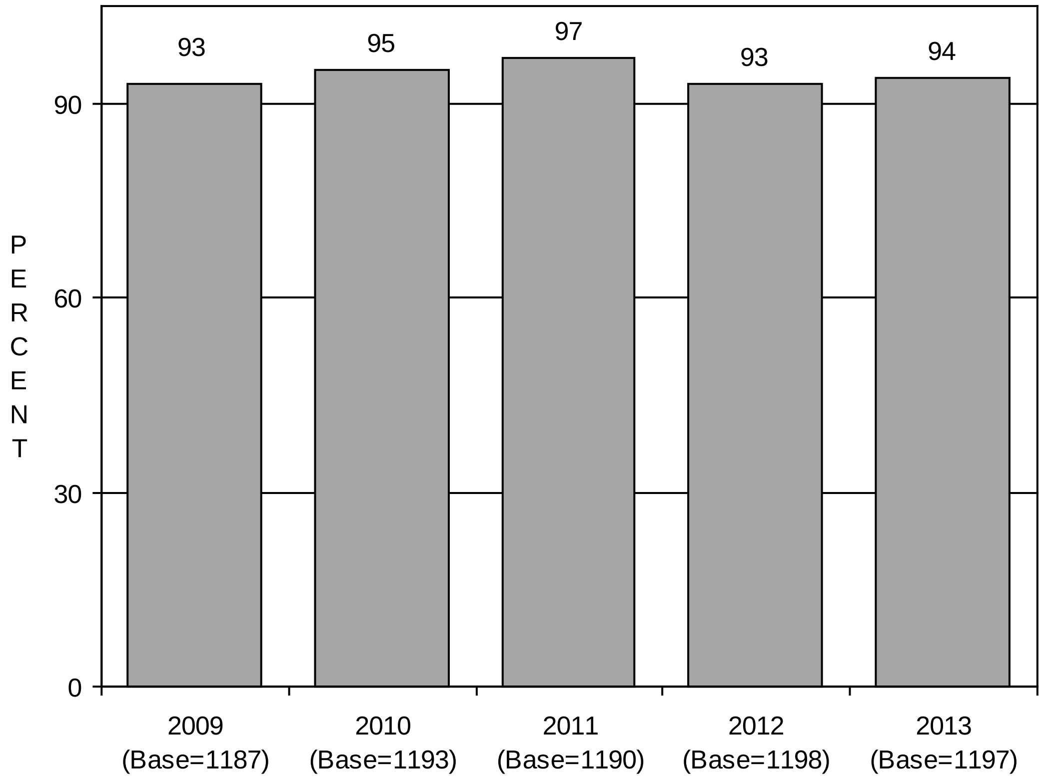
As Figure 57 shows, 64% of gamblers in 2013 played slot machines most often, up significantly from 2009 – 2012 readings. Seventeen percent (17%) said they played video poker machines most often (down from 20% in 2009 and 21% in 2010), followed by 9% who said blackjack (down from 12% each in 2010 and 2012). Five percent (5%) played Keno most often (up from 2009 – 2012 readings), while less than 1% percent played poker most often (down from 2009 – 2012).

FIGURE 58
Trip Gambling Budget
(Among Those Who Gambled)



The average gambling budget reported by visitors to Laughlin in 2013 was $575.30, significantly higher than the averages of $511.17 in 2009 and $457.46 in 2010 (Figure 58). Thirty-one percent (31%) said their gambling budget was $600 or more (up from 25% in 2009, 20% in 2010, and 27% in 2011), while 21% said it was $500 to $599 (up from 16% in 2009). Nineteen percent (19%) allocated less than $300 for their gambling budget, down significantly from 32% in 2009, 36% in 2010, 28% in 2011, and 24% last year.

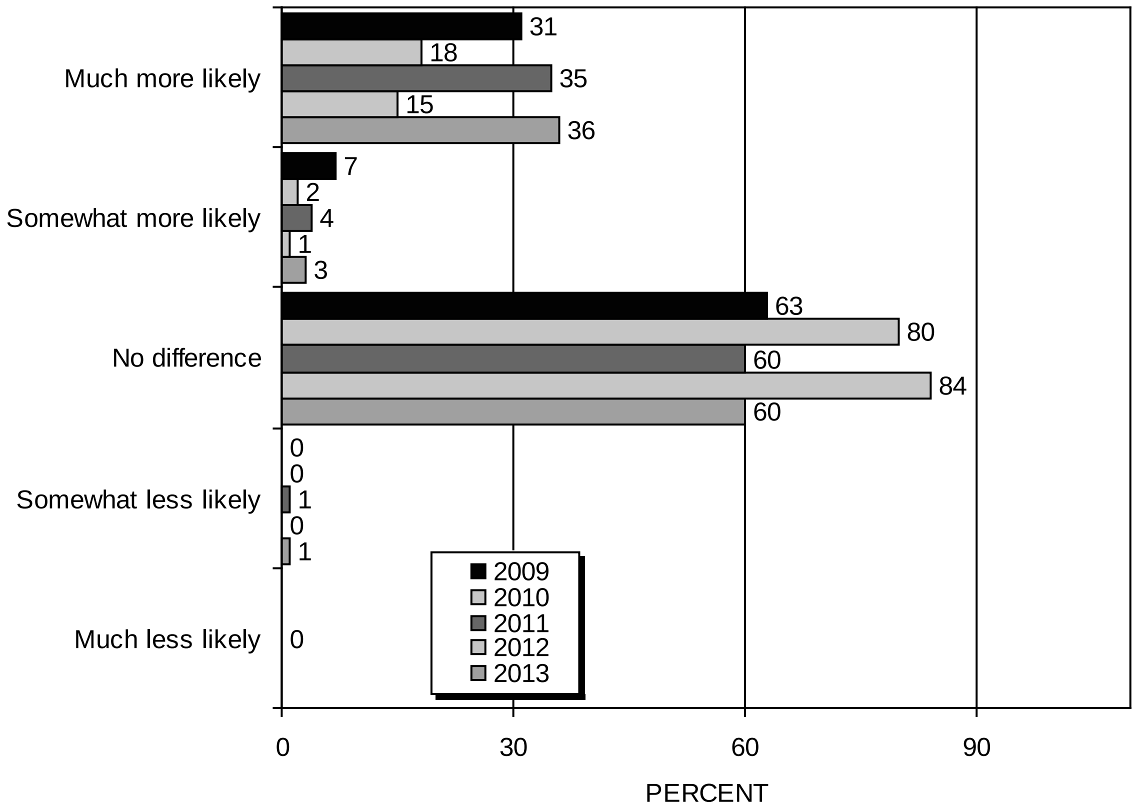
FIGURE 59
Whether Member Of A Slot/Loyalty Club*



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 2013, 94% of gamblers said they were (Figure 59), down significantly from 97% in 2011.

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

FIGURE 60
Likelihood Of Visiting Laughlin With
More Places To Gamble Outside Laughlin

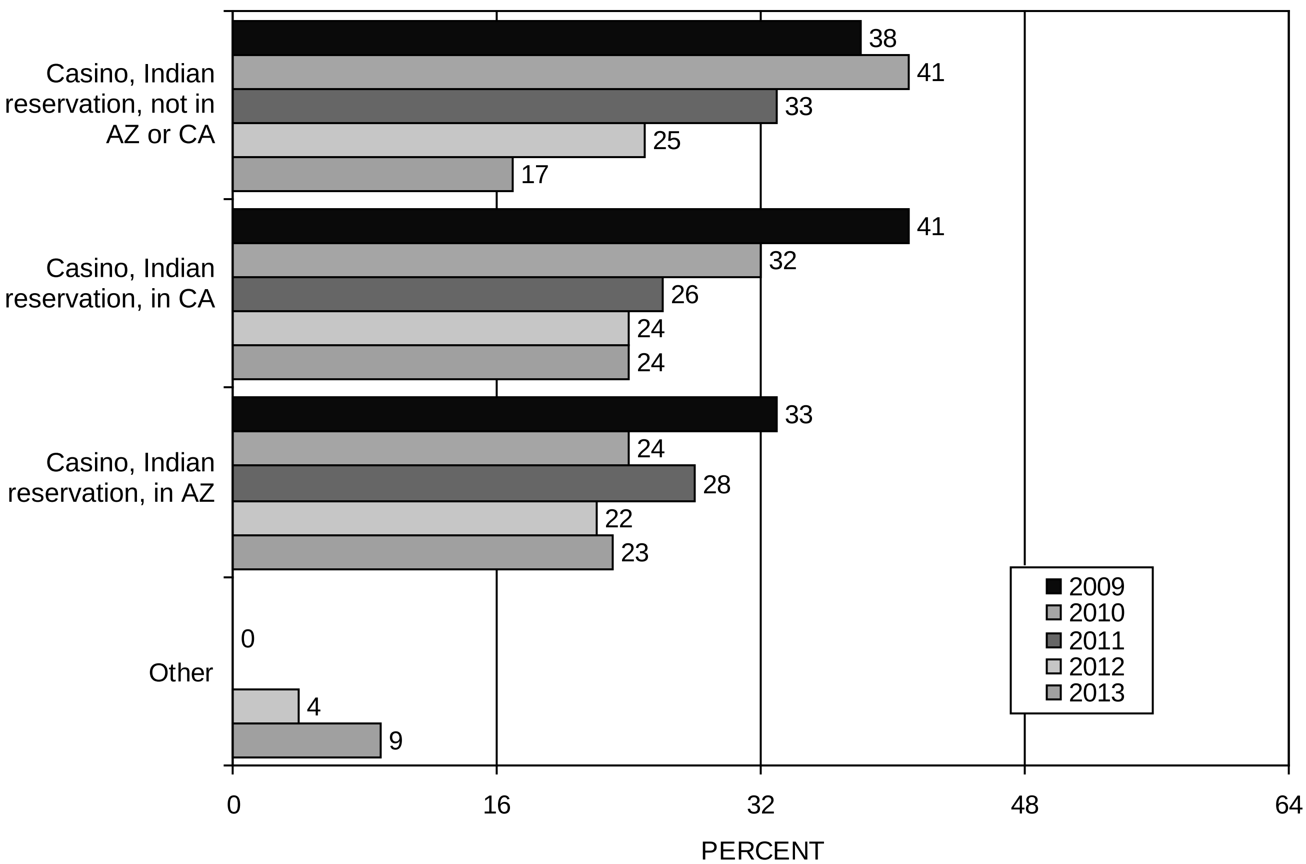


All visitors to Laughlin were asked the following:

> "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 2013, 60% said having more places to gamble would make no difference in their decision to visit Laughlin, down significantly from 80% in 2010 and 84% in 2012. Thirty-six percent (36%) said that having other places to gamble made them *much more* likely to visit Laughlin (up significantly from 31% in 2009, 18% in 2010, and 15% last year), while 3% said it would make them *somewhat more* likely to visit (down from 7% in 2009 and 4% in 2011). Only 1% indicated they were less likely to visit Laughlin because of the availability of other places to gamble (Figure 60).

FIGURE 61
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 61). Twenty-four percent (24%) reported gambling at an Indian reservation in California, down significantly from 41% in 2009 and 32% in 2010. Twenty-three percent (23%) said they gambled at an Indian reservation in Arizona, down from 33% in 2009 and 28% in 2011. Seventeen percent (17%) said they gambled at an Indian reservation outside of Arizona or California, down from 2009 – 2012 results.

---

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

Ninety-four percent (94%) of Laughlin visitors said they were “very satisfied” with their visit to Laughlin in the 2013 survey (Figure 62), up significantly from 92% in 2009. Five percent (5%) said they were “somewhat satisfied” with their visit.

FIGURE 62
Satisfaction With Visit

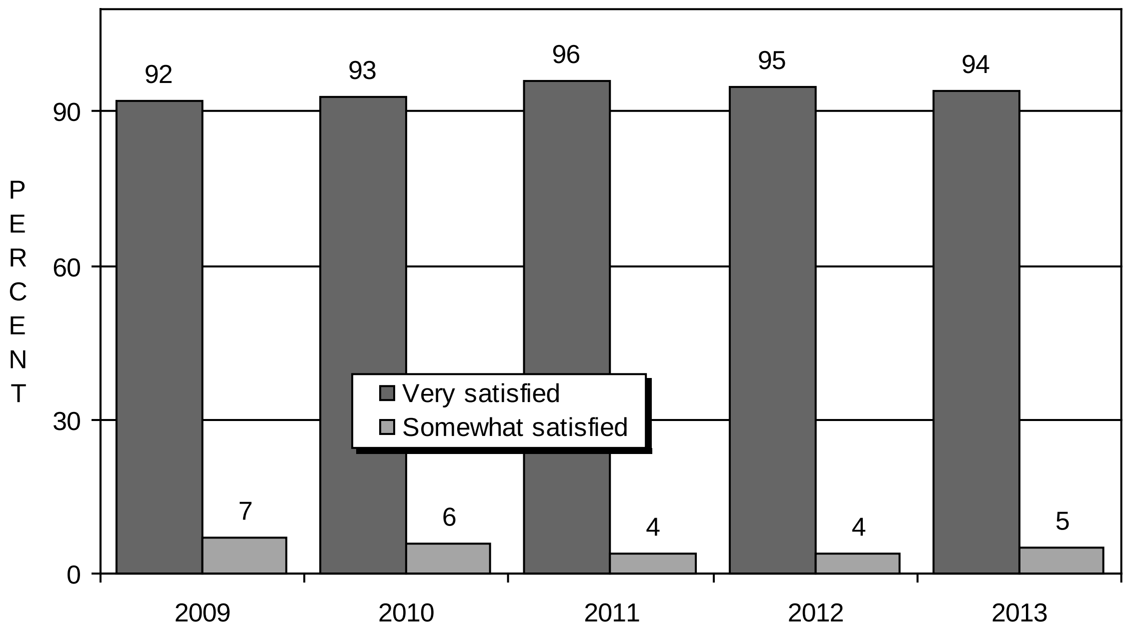
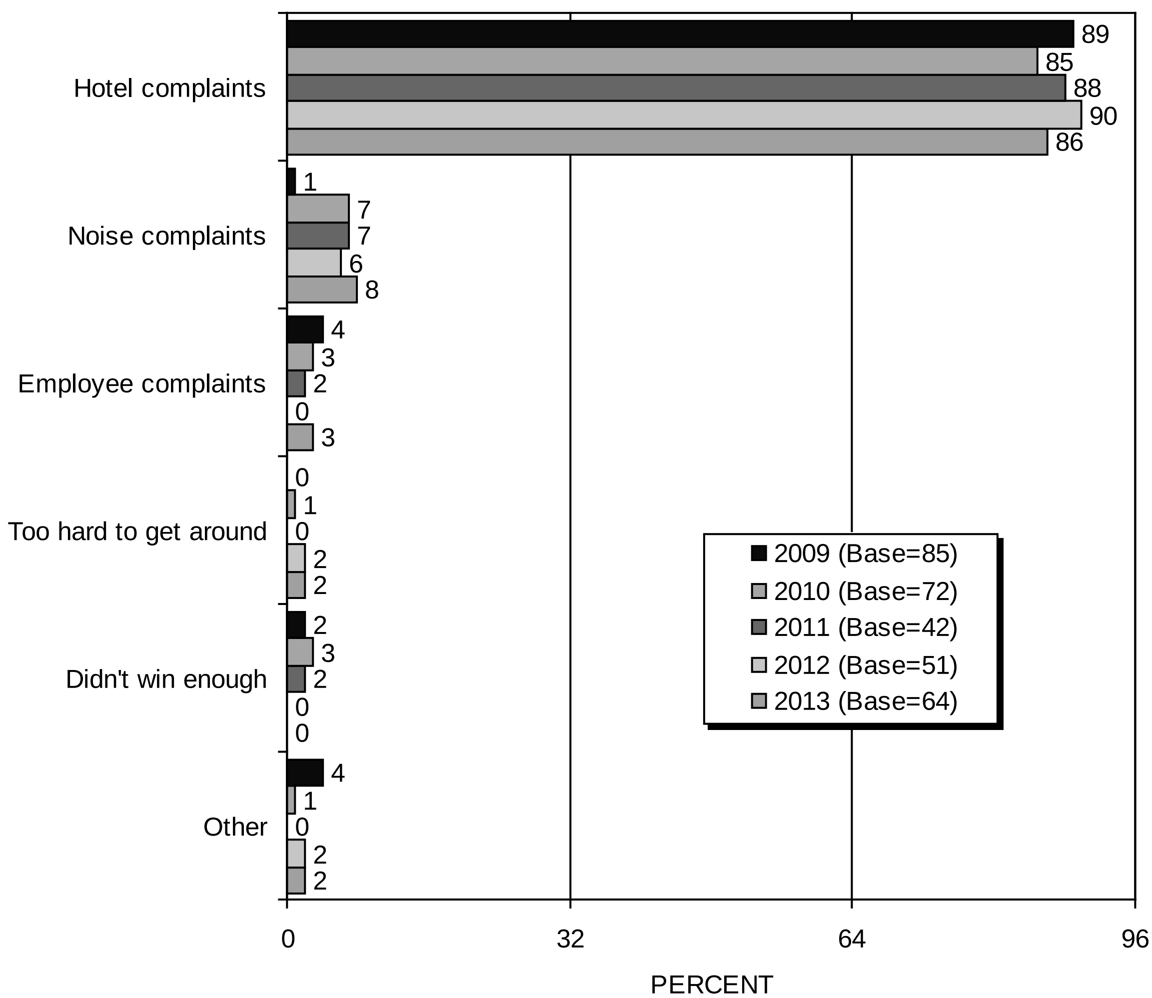
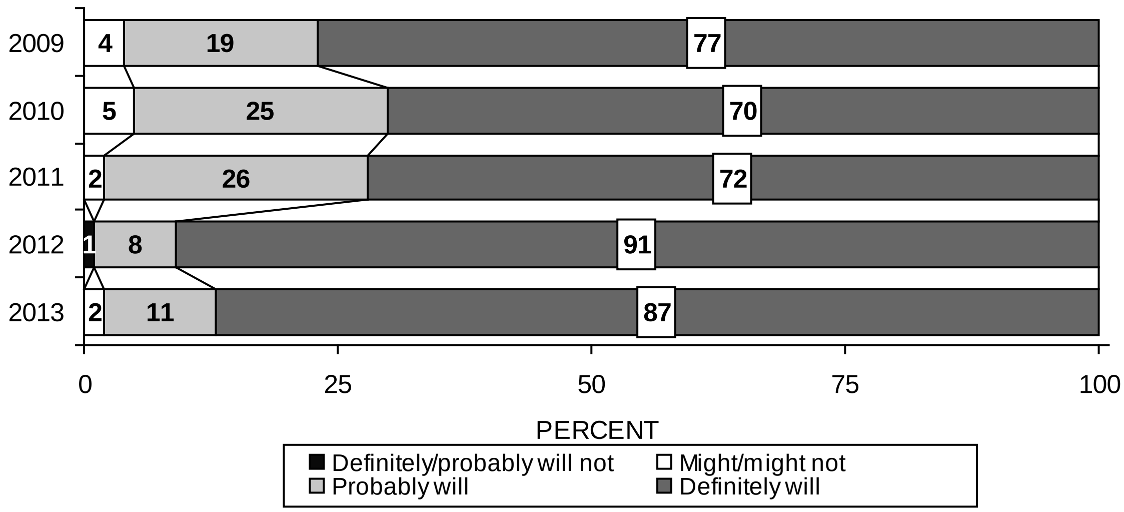


FIGURE 63
Why Not "Very" Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



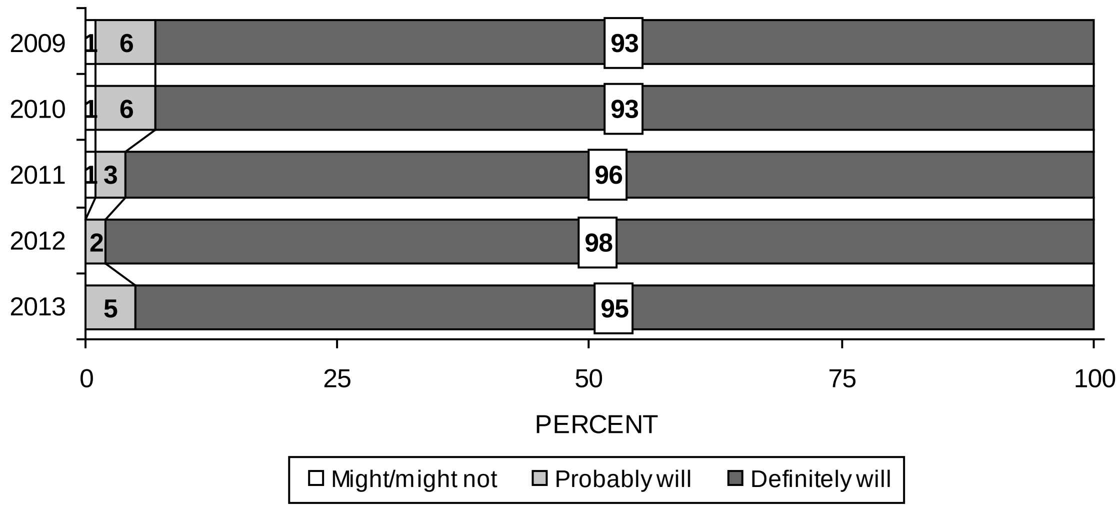
Those who were "somewhat" satisfied were asked why they were not "very" satisfied (Figure 63). Eighty-six percent (86%) mentioned complaints with their hotels, similar to past years. Eight percent (8%) had noise-related complaints.

FIGURE 64
Likelihood Of Returning To Laughlin Next Year



Visitors were asked how likely they are to return to Laughlin next year (Figure 64). Eighty-seven percent (87%) said they “definitely will” return, down significantly from 91% last year, but up from 77% in 2009, 70% in 2010, and 72% in 2011. Eleven percent (11%) said they “probably” will return to Laughlin in the next year, up from 8% in last year, while down from 19% in 2009, 25% in 2010, and 26% in 2011.

FIGURE 65
Likelihood Of Recommending Laughlin To Others



Visitors were also asked how likely they are to recommend Laughlin to others (Figure 65). Ninety-five percent (95%) said they "definitely will" recommend Laughlin to others, similar to past years.

VISITOR DEMOGRAPHICS

As Figures 66 and 67 show, Laughlin visitors in 2013 were most likely to be married (72%, down from 76% in 2009 and 79% in 2011) and white (82%, down from 85% in 2011). Thirty-five percent (35%) of visitors were from California, while one-quarter (25%) were from Arizona (up from 21% in 2009 and 20% in 2010). Five percent (5%) were foreign visitors, down from 8% in 2012. One-third (34%) of visitors were 65 or older, down significantly from 47% each in 2009 and 2010, 49% in 2011, and 54% last year. The proportions of visitors 40 to 49 years old (17%) and 50 to 59 years old (25%) were up significantly from 2009 – 2012 readings. The average age was 57.9 years old, down from 2009 – 2012 readings. Visitors were more likely to be retired (62%, down from 67% in 2012 but up from 2009 – 2011) than employed (34%, up from 30% last year but down from 2009 – 2011). Thirty-eight percent (38%) had a high school diploma or less (down significantly from 2009 – 2011 readings), while 32% were college graduates (up from 2009 – 2010). Fifty-two percent (52%) had a household income of less than $60,000, up from 47% last year but down from 58% in 2010.

FIGURE 66
VISITOR DEMOGRAPHICS

	2009	2010	2011	2012	2013
GENDER					
Male	50%	50%	51%	50%	51%
Female	50	50	49	50	49
MARITAL STATUS					
Married	76	75	79	75	72
Single	12	11	8	14	16
Separated/divorced	5	6	5	3	4
Widowed	7	8	8	7	8
EMPLOYMENT					
Employed	42	41	38	30	34
Unemployed	1	1	2	1	1
Student	1	0	1	0	0
Retired	54	53	57	67	62
Homemaker	3	4	2	1	2
EDUCATION					
High school or less	44	43	45	42	38
Some college	32	31	21	28	29
College graduate	24	25	33	31	32
Trade/vocational school	0	1	1	0	1
AGE					
21 to 29	2	3	3	2	2
30 to 39	7	6	5	5	7
40 to 49	11	10	10	9	17
50 to 59	19	18	20	18	25
60 to 64	14	15	14	13	16
65 or older	47	47	49	54	34
MEAN	60.9	60.6	61.8	63.1	57.9
BASE	(1200)	(1200)	(1200)	(1200)	(1200)

FIGURE 67
VISITOR DEMOGRAPHICS
(Continued/2)

	2009	2010	2011	2012	2013
ETHNICITY					
White	83%	82%	85%	84%	82%
African-American/Black	3	3	2	3	3
Asian/Asian American	2	2	1	2	1
Hispanic/Latino	11	12	10	11	13
Other	1	2	1	0	0
HOUSEHOLD INCOME					
Less than $20,000	3	4	3	3	1
$20,000 to $39,999	22	27	17	12	10
$40,000 to $59,999	30	27	31	32	41
$60,000 to $79,999	22	20	24	30	33
$80,000 or more	23	21	23	23	15
Not sure/no answer	1	1	1	0	0
VISITOR ORIGIN					
U.S.A.	94	94	93	92	95
Eastern states*	2	2	1	1	2
Southern states†	6	7	4	5	4
Midwestern states‡	15	14	15	12	13
Western states§	72	71	74	74	76
California	35	35	33	33	35
Southern California	33	32	31	31	33
Northern California	2	3	2	2	2
Arizona	21	20	26	25	25
Greater Las Vegas	3	2	3	3	2
Other West	13	13	13	13	14
Foreign	6	6	7	8	5
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...............	**TERMINATE**
NOT SURE/DK.........	
REFUSED/NA..........	

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

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

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

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

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

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

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

10.2 MEAN (ALL VISITORS)
11.9 MEAN (REPEAT VISITORS) (N=1020)

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

2.9 MEAN (ALL VISITORS)
3.2 MEAN (REPEAT VISITORS) (N=1020)

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 .... 35% (N=1020)

NO 65

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=1020)

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

TO ATTEND A CORPORATE MEETING 0

VACATION/PLEASURE 28

TO GAMBLE.......................................8

VISIT FRIENDS/RELATIVES 41

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..............14

OTHER 1

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	0%
VACATION/PLEASURE	44
TO GAMBLE	30
VISIT FRIENDS/RELATIVES	13
TO ATTEND A SPECIAL EVENT (E.G., DESERT CHALLENGE, A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)	6
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	1
OTHER BUSINESS PURPOSES	1
WATER-BASED RECREATION	1
JUST PASSING THROUGH	1
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	17%
NO	83
NOT SURE/DK	0
REFUSED/NA	0

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

Air	12%
Bus (IF "YES" ASK, "Do you mean...":)	
Regularly scheduled bus service like Greyhound	1
Or a chartered or escorted bus service or bus tour	2
Truck	2
Automobile	80
Motorcycle	0
Recreational Vehicle (RV)	3
REFUSED/NA	0

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

SAME DAY	3%
1-3 DAYS BEFORE	9
4-6 DAYS BEFORE	1
7-14 DAYS BEFORE	21
15-30 DAYS BEFORE	28
31-60 DAYS BEFORE	17
61-90 DAYS BEFORE	9
MORE THAN 90 DAYS BEFORE	12
NOT SURE/DK	0
REFUSED/NA	0

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

YES 0%	**SKIP TO B4**
NO 100	**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=1197)

CALLED 800#.. 50%
GOT INVITE FROM HOTEL/CASINO ... 27
USED THE INTERNET 11
DAY TRIP/STAYING WITH FRIENDS/ RELATIVES... 3
BUSINESS/COMPANY MADE PLANS 1
LAST MINUTE DECISION/NO TIME 3
ALL OTHER MENTIONS 5

AFTER ASKING B3a, SKIP TO B4a

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

B4. Did the travel agent... **(READ LIST)**
(N=1)

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

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

YES 16%	**ASK B4b**
NO .... 84 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=192)

	YES	NO	DON'T KNOW	RE-FUSED
"Book" your accommodations?	71%	39%	0%	0%
"Book" your transportation?	9	91	0	0

B4c. Did you find information on the Internet that... **(READ LIST)**
(N=192)

	YES	NO	DON'T KNOW	RE-FUSED
Influenced your decision to visit Laughlin?	1%	99%	0%	0%
Influenced your choice of accommodations?	91	9	0	0

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

AMONG ALL RESPONDENTS:	Before Leaving Home	While En Route To Laughlin	After Arrival	DOES NOT APPLY	DON'T KNOW	RE-FUSED
				DO *NOT* READ THESE RESPONSE CODES		
a. Where you would stay?	93%	0%	4%	3%	0%	0%
b. Where you would gamble?	96	0	4	0	0	0
c. Which shows you would see?	13	0	13	73	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%	0%	4%	0%	(N=1166)
b. Where you would gamble?	96	0	4	0	(N=1197)
c. Which shows you would see?	48	0	46	6	(N=328)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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	**SKIP TO C1**
REFUSED/NA	0	

B7. Where are you traveling from? **(PROBE FOR LOCATION IMMEDIATELY PRIOR TO LAUGHLIN VISIT.)** (N=71)

LAS VEGAS	51%	**ASK B7a**
ARIZONA	25	**SKIP TO C1**
CALIFORNIA	14	
OTHER	10	
NOT SURE/DK	0	
REFUSED/NA	0	

B7a. Did you travel to Las Vegas by... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=36)

Air 33%

Automobile, truck, RV, bus 67

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	93%
MOTEL	1
RV PARK	2
FRIENDS/RELATIVES	1
DAYTRIP/OTHER	3

<u>LOCATION OF LODGING</u>

LAUGHLIN	93%
BULLHEAD CITY	1
DAYTRIP/LOCATION COULD NOT BE DETERMINED	6

<u>TYPE OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=1166)

HOTEL	96%
MOTEL	1
RV PARK	3
FRIENDS/RELATIVES	1
OTHER	0

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

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

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

C1a. Which of the following **[SHOW CARD]** best describes how you, or someone in your party, booked your accommodations in Laughlin? **(ACCEPT ONLY ONE RESPONSE.)** (N=1160)

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 0
d. Booked at a website on the Internet..12
e. Booked in person at the hotel, motel, or RV park 5
f. The trip was a gift, prize, or incentive, so the accommodations were booked for you.......................5
g. Not sure because someone else in your party booked the hotel and you don't know how they did it........1

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=136)

EXPEDIA.COM................................ 17%
TRAVEL.COM 0
ORBITZ 0
PRICELINE.COM 2
CHEAPTICKETS............................... 0
TRAVELOCITY.................................. 3
YAHOO... 1
AOL 4
HOTEL WEB SITE (ANY).. 71
OTHER... 2
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=1160)

SAME DAY 5%
1-3 DAYS BEFORE 12
4-6 DAYS BEFORE 3
7-14 DAYS BEFORE 31
15-30 DAYS BEFORE 35
31-60 DAYS BEFORE 11
61-90 DAYS BEFORE 3
MORE THAN 90 DAYS BEFORE 1
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=1131)

ONE 10%
TWO 78
THREE...............................7
FOUR OR MORE 5
REFUSED/NA.....................0
2.1 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=1131)

HOTEL/AIRLINE PACKAGE DEAL..........13% HOTEL/AMENITIES PACKAGE DEAL............0 TOUR/ TRAVEL GROUP 0	**ASK C6**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE ....27 REGULAR FULL-PRICE ROOM RATE....12	**SKIP TO C8**
CASINO COMPLIMENTARY 47	**SKIP TO C9**
ANOTHER RATE ....0 NOT SURE/DK...............0 REFUSED/NA 0	**SKIP TO C8**

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

(N=154)

Less than $50..................0%
$50 - $99 4
$100 - $149 14
$150 OR MORE 82
NOT SURE/REFUSED....0
$240.23 MEAN
$250.00 MEDIAN

C6a. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=154)

OUTDOOR BILLBOARD 0%
BROCHURE 7
E-MAIL OFFER.................................. 0
INTERNET AD (POP-UP OR BANNER AD) 1
OFFER RECEIVED IN THE MAIL 39
NEWSPAPER.................................... 2
RADIO.. 0
RESERVATION AGENT/ CALL CENTER 24
TELEVISION...................................... 0
TRAVEL AGENT 1
ANY WEB SITE 8
WORD-OF-MOUTH.......................... 16
SOCIAL MEDIA (e.g., Facebook, Twitter, LinkedIn, Google Plus, MySpace, YouTube) 1
OTHER 0
NOT SURE/DK 3
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=448)

Less than $25 .... 15%
$25 - $49............................ 46
$50 OR MORE................... 39
NOT SURE/NO ANSWER... 0
$41.30 MEAN
$40.00 MEDIAN

C8a. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=448)

OUTDOOR BILLBOARD	0%
BROCHURE	5
E-MAIL OFFER	1
INTERNET AD (POP-UP OR BANNER AD)	10
OFFER RECEIVED IN THE MAIL	17
NEWSPAPER	0
RADIO	0
RESERVATION AGENT/ CALL CENTER	20
TRAVEL AGENT	0
ANY WEB SITE	20
WORD-OF-MOUTH	26
OTHER	0
NOT SURE/DK	1
REFUSED/NA	0

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

(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)

1	11%
2	83
3	6
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	3%
1	4
2	25
3	34
4	17
5 OR MORE	17
3.4	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	3%
2	4
3	25
4	34
5	17
6 OR MORE	17
4.4	MEAN
4.0	MEDIAN

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

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

D1. Have you gambled during this visit to Laughlin?

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

D2. On average, how many hours *PER DAY* did you spend gambling? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?") (N=1197)

1 TO 2 HOURS 9%
3 TO 4 HOURS 27
5 TO 6 HOURS 31
7 TO 8 HOURS 22
9 TO 10 HOURS 11
MORE THAN 10 HOURS........... 1
5.8 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=1197)

1.. 23%
2.. 25
3.. 21
4.. 14
5 TO 6....................................... 10
MORE THAN 6........................... 7
3.0 MEAN
3.0 MEDIAN

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

SLOT MACHINES ......64% VIDEO POKER ....17 OTHER VIDEO MACHINES (21, KENO, ETC.) 1	**ASK D5**
BACCARAT ....0 BIG 6............................0	**SKIP TO D7**
BINGO 1	**SKIP TO D10**
BLACKJACK.................9 CARIBBEAN STUD POKER ....0 CRAPS.........................1	**SKIP TO D7**
KENO...........................5	**SKIP TO D10**
POKER 0	**SKIP TO D7**
RACE/SPORTS-BOOK...........................1	**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=969)

PENNY...............................51%
NICKEL 8
DIME 0
QUARTER 35
HALF DOLLAR 0
DOLLAR...............................6
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=969)

1-2	2%
3	14
4-5	31
6 OR MORE	53
REFUSED/NO ANSWER	0
31.6	MEAN
20.0	MEDIAN

SKIP TO D10

★ ★ ★ ★ ★ ★ ★ ★ ★

D7. What table minimum do you play *MOST OFTEN*. **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=143)

LESS THAN $1.00	0%
$1.00	1
$2.00	5
$3.00-$4.00	0
$5.00	62
$10.00	25
$25.00	1
$50.00	0
OVER $50.00	0
OTHER	0
NOT SURE/DK	4
REFUSED/NA	2

CONTINUE WITH D8

D8. What is your average bet? **(WRITE AMOUNT IN BLANKS BELOW.)** (N=143)

$1 - $3	4%
$4 - $9	39
$10 - $20	36
OVER $20	3
DON'T KNOW/NA	18
$8.64	MEAN
$5.00	MEDIAN

**INTERVIEWER:
THERE IS NO QUESTION D9**

D10. **(ASK OF ALL GAMBLERS.)** Not including travel, food, or lodging, how much money did you budget for gambling on this trip? Include only your own, personal, gambling budget and not the gambling budgets of others who may have been with you. **(ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)** (N=1197)

$1 - $99	0%
$100 - $199	5
$200 - $299	14
$300 - $399	18
$400 - $499	12
$500 - $599	21
$600 OR MORE	31
NOT SURE/NO ANSWER	0
$575.30	MEAN
$500.00	MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=1197)

YES	94%
NO	6
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 24%
B. At a casino on an Indian reservation in Arizona 23
C. At a casino on an Indian reservation outside Arizona or California.............. 17
J. Somewhere else in Nevada (outside the Laughlin area) 0
X. OTHER 9

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..................36%
SOMEWHAT MORE LIKELY 3
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 65%
NO 35
NOT SURE/DK..................0
REFUSED/NA 0

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

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

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

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

(N=156)

A. Downtown Las Vegas (that is, the area on or near Fremont Street)?..........59%
B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?..........................74

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

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

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

(N=85)

Hoover Dam.................................9%
Lake Mead 1
Lake Havasu/ Colorado River..40
Lake Mojave/ Davis Dam 8
Grand Canyon..............................4
Bryce Canyon...............................0
Zion National Park 0
Oatman, Arizona.........................69
Other 2

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.)**

$134.13 MEAN (INCLUDING $0)
$134.13 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.)**

$71.93 MEAN (INCLUDING $0)
$77.35 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)	$66.15	MEAN (INCLUDING $0)
		$122.12	MEAN (EXCLUDING $0)
B.	Shows/entertainment (not including gambling)	$8.84	MEAN (INCLUDING $0)
		$38.56	MEAN (EXCLUDING $0)
C.	Sightseeing	$6.67	MEAN (INCLUDING $0)
		$97.50	MEAN (EXCLUDING $0)
D.	Other	$0.33	MEAN (INCLUDING $0)
		$80.00	MEAN (EXCLUDING $0)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

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

Very satisfied 94%	**SKIP TO G1 ON PAGE 13**
Somewhat satisfied 5	**ASK F2**
Somewhat dissatisfied........ 0 Very dissatisfied 0	**SKIP TO F3**
<u>DO NOT READ</u> NOT SURE/DK................... 0 REFUSED/NA 0	**SKIP TO G1 ON PAGE 13**

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

(N=64)

HOTEL COMPLAINTS.......................... 86%
NOISE COMPLAINTS............................ 8
TOO HARD TO GET AROUND 2
EMPLOYEE COMPLAINTS 3
OTHER.. 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=4)

HOTEL COMPLAINTS.......................... 50%
EMPLOYEE COMPLAINTS 50

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

Definitely will 87%
Probably will.................................11
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 Laughlin to friends, relatives, and co-workers as a destination for a vacation or pleasure trip? Would you say you… **(READ FIRST 5 RESPONSES)**

Definitely will recommend............95%
Probably will recommend 5
Might/might not recommend..........0
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......................34%	**ASK G2**
Unemployed ....1 Student ....0 Retired ....62 Homemaker.....................2	**SKIP TO G3**
DO NOT READ REFUSED/NA 0	**SKIP TO G3**

G2. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS NOT AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=412)

SALES/CLERICAL WORKERS... 28%

SERVICE WORKERS................. 24

MANAGERS/OFFICIALS/
PROPRIETORS 21

PROFESSIONAL/TECHNICAL ... 17

CRAFT WORKERS/FOREMEN.... 9

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...................1%

HIGH SCHOOL DIPLOMA
(FINISHED GRADE 12)................37

SOME COLLEGE (INCLUDES
JUNIOR/COMMUNITY
COLLEGE — NO
BACHELOR'S DEGREE) 29

GRADUATED COLLEGE.............32

GRADUATE SCHOOL
(MASTER'S OR PH.D.)..................0

TECHNICAL, VOCATIONAL,
OR TRADE SCHOOL.....................1

REFUSED/NA 0

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

Married......................................72%

Single 16

Separated or divorced..................4

Widowed 8

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

G5. What country do you live in?

USA................................ 95%	**ASK G6**
FOREIGN 5	**SKIP TO G7**
REFUSED/NA.................. 0	**SKIP TO G7**

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

EAST 2%

SOUTH..4

MIDWEST 13

WEST..76

- CALIFORNIA 35
- ARIZONA................................25
- GREATER LAS VEGAS 2
- OTHER WEST.........................14

FOREIGN VISITORS 5

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	82%
BLACK OR AFRICAN AMERICAN	3
ASIAN OR ASIAN AMERICAN	1
HISPANIC/LATINO	13
NATIVE AMERICAN	0
MIXED RACE	0
OTHER	0
NOT SURE/DON'T KNOW	0
REFUSED/NO ANSWER	0

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

57.9 MEAN
59.0 MEDIAN

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

21 to 29	2%
30 to 39	7
40 to 49	17
50 to 59	25
60 to 64	16
65 and older	34
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	1%
B. $20,000 to $29,999	1
C. $30,000 to $39,999	10
D. $40,000 to $49,999	20
E. $50,000 to $59,999	21
F. $60,000 to $69,999	18
G. $70,000 to $79,999	16
H. $80,000 to $89,999	10
I. $90,000 to $99,999	3
J. $100,000 to $149,999	3
K. $150,000 or more	0
NOT SURE/DK	0
REFUSED/NA	0

RESPONDENT SHOW CARDS

HOW ACCOMMODATIONS WERE BOOKED

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

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

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

d. **<u>INTERNET</u>**
Booked at a website on the Internet

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

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

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

HOTEL/MOTEL RATES

1. **<u>HOTEL/TRANSPORTATION PACKAGE DEAL</u>**
   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. **<u>HOTEL/AMENTIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)</u>**
   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. **<u>TOUR/TRAVEL GROUP</u>**
   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. **<u>CONVENTION GROUP/COMPANY MEETING</u>**
   Arranged through an employer or convention.

5. **<u>CASINO RATE</u>**
   Special reduced rate arranged through a casino host or casino employee.

6. **<u>REGULAR FULL-PRICE ROOM RATE</u>**
   Full price, no discounts.

7. **<u>CASINO COMPLIMENTARY</u>**
   Room is free of charge.

8. **<u>ANOTHER RATE</u>**
   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 $109,999

K. $110,000 to $119,999

L. $120,000 to $129,999

M. $130,000 to $139,999

N. $140,000 to $149,999

O. $150,000 or more

IT'S LIKE YOU OWN THE PLACE

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

VisitLaughlin.com

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

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