LAUGHLIN VISITOR PROFILE STUDY 2014

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LAUGHLIN VISITOR PROFILE

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By:

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VISITOR PROFILE STUDY

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EXECUTIVE SUMMARY

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

This report presents the findings from the 1,200 personal interviews conducted by GLS Research from January 1, 2014 to December 31, 2014. Approximately one hundred (100) in-person interviews were conducted per month in or near Laughlin hotel-casinos and hotels.

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

REASONS FOR VISITING

Thirteen percent (13%) of visitors were first-time visitors to Laughlin, significantly lower than 18% in 2010. Among first-time visitors, 58% said their primary reason for visiting Laughlin was vacation or pleasure (down significantly from 75% in 2012), while 9% mentioned gambling. Among repeat visitors, 37% mentioned vacation or pleasure as their primary reason for their current visit (down from 56% in 2011, 73% in 2012, and 43% last year), while gambling was cited by 41% (up from 2010 – 2013 results). The average number of Laughlin visits among all visitors in the past year was 2.8 (up significantly from 2.5 each in 2010 and 2011), while among repeat visitors it was 3.0 (up from 2.8 each in 2010 and 2011). The average number of visits among all visitors in the past five years was 10.1, while among repeat visitors it was 11.5.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2010	2011	2012	2013	2014
Proportion of visitors who were first-time visitors	18%	15%	13%	15%	13%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	62%	51%	75%	49%	58%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	12%	14%	7%	6%	9%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	35%	56%	73%	43%	37%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	36%	29%	20%	34%	41%
Average number of visits in past five years (all visitors)	10.1	10.0	10.5	10.2	10.1
Average number of visits in past five years (repeat visitors)	12.0	11.6	11.9	11.9	11.5
Average number of visits in past year (all visitors)	2.5	2.5	2.9	2.9	2.8
Average number of visits in past year (repeat visitors)	2.8	2.8	3.2	3.2	3.0

TRAVEL PLANNING

Most visitors arrived in Laughlin via ground transportation (88%, up from 85% in 2010). Nearly nine in ten visitors (88%) arrived in Laughlin directly from their permanent residences (down from 94% each in 2011 and 2013, and 98% in 2012). As in the past, most visitors decided where to stay in Laughlin before arriving in Laughlin (97%). Most visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (91%, up from 87% in 2011, but down from 96% last year). Of those visitors who saw shows during their visit, 49% decided what shows to see *before* arriving in Laughlin (up significantly from 7% in 2010, 20% in 2011, and 35% in 2012). Eighteen percent (18%) of all Laughlin visitors said they used the Internet to plan their trip (up significantly from 12% in 2010, 15% in 2011, and 11% in 2012). Thirteen percent (13%) of Laughlin visitors also visited Las Vegas on their current trip, the same as last year, but down significantly from 20% in 2010, and 17% in 2011. Twelve percent (12%) toured other nearby places, up significantly from 7% last year.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2010	2011	2012	2013	2014
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/truck/RV)	85%	87%	88%	88%	88%
Proportion of visitors who traveled to Laughlin by air	15%	13%	12%	12%	12%
Proportion of visitors who traveled to Laughlin from their permanent residence	89%	94%	98%	94%	88%
Proportion of visitors who decided where to stay in Laughlin before arrival	97%	97%	97%	96%	97%
Proportion of visitors who decided where to gamble in Laughlin before arrival	92%	87%	93%	96%	91%
Proportion of visitors who decided which shows to see in Laughlin before arrival	7%	20%	35%	48%	49%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	1%	0.4%	0%	0.1%	0.3%
Proportion of visitors who used the Internet in planning their trip to Laughlin	12%	15%	11%	16%	18%
Proportion of visitors who have visited Las Vegas in the past five years	71%	69%	67%	65%	65%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	20%	17%	14%	13%	13%
Proportion of visitors who toured nearby places	11%	12%	10%	7%	12%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.0, up significantly from 1.9 in 2010. Four percent (4%) had people under the age of 21 in their immediate party, down significantly from 5% each in 2011 and 2013. Their stay averaged 3.5 nights and 4.5 days, up from 2010 – 2012 readings. Ninety-six percent (96%) of visitors who stayed overnight lodged in a hotel or motel (down from 98% each in 2010 – 2012), with an average of 2.0 room occupants. Non-package overnight visitors who stayed in a hotel or motel spent an average of $42.10 for their room, significantly higher than the averages of $38.35 in 2010, $39.20 in 2011, and $37.26 in 2012. Thirteen percent (13%) of visitors who stayed in a hotel or motel paid a package/tour group rate. The average package cost was $223.17, not significantly different from past years. The average food and drink expenditures in 2014 were $146.52 per trip, up significantly from $122.22 in 2012 and $134.13 last year, but down significantly from $205.34 in 2010 and $185.30 in 2011. The average local transportation expenditures were $64.97 per trip, up significantly from $34.27 in 2010 and $57.79 in 2012, but down from $71.93 last year. The average total spent on shopping was $65.76, up significantly from $57.72 in 2010. An average of $7.87 was spent on shows (up significantly from 2010 – 2012), and an average of $8.07 was spent on sightseeing (up from $3.47 in 2010 and $4.74 in 2011).

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2010	2011	2012	2013	2014
Average number of adults in immediate party	1.9	2.0	2.0	2.0	2.0
Proportion of visitors with persons under 21 in their immediate party	4%	5%	3%	5%	4%
Proportion of visitors who stayed overnight	98%	99%	97%	97%	96%
Days stayed (average)	4.1	4.2	4.3	4.4	4.5
Nights stayed (average)	3.1	3.2	3.3	3.4	3.5
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	98%	98%	98%	97%	96%
Number of room occupants (average)	2.0	2.0	2.0	2.1	2.0
Lodging expenditures (average per night — non-package)	$38.35	$39.20	$37.26	$41.30	$42.10
Proportion of visitors who bought a package or travel group trip	14%	13%	13%	14%	13%
Average cost of package per person (among package/tour group visitors)	$221.58	$232.92	$235.24	$240.23	$223.17
Average trip expenditures for food and drink	$205.34	$185.30	$122.22	$134.13	$146.52
Average trip expenditures for local transport	$34.27	$61.03	$57.79	$71.93	$64.97
Average trip expenditures for shopping	$57.72	$65.81	$73.64	$66.15	$65.76
Average trip expenditures for shows	$3.75	$5.08	$5.55	$8.84	$7.87
Average trip expenditures for sightseeing	$3.47	$4.74	$7.73	$6.67	$8.07

GAMING BEHAVIOR AND BUDGETS

Nearly all visitors (99%, down from 100% each in 2012 and 2013) gambled while in Laughlin. Those who gambled budgeted an average of $655.65, significantly higher than 2010 – 2013 results. Gamblers spent an average of 5.3 hours a day gambling, down from 2010 – 2013 results. Those visitors who gambled said they gambled at an average of 2.9 casinos, up from an average of 2.4 in 2010 and 2.6 in 2011. Ninety-three percent (93%) of gamblers said they were a member of a slot or loyalty club, down from 95% in 2010 and 97% in 2011.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2010	2011	2012	2013	2014
Proportion who gambled while visiting Laughlin	99%	99%	100%	100%	99%
Average trip gambling budget (among those who gambled)	$457.46	$537.97	$566.38	$575.30	$619.43
Average hours per day spent gambling (among those who gambled)	6.0	5.9	6.0	5.8	5.3
Average number of different casinos gambled (among those who gambled)	2.4	2.6	3.0	3.0	2.9
Member of slot/loyalty club	95%	97%	93%	94%	93%

ATTITUDINAL INFORMATION

Ninety-two percent (92%) of visitors reported that they were "very satisfied" with their trip to Laughlin, down significantly from 96% in 2011, 95% in 2012, and 94% last year.

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2010	2011	2012	2013	2014
Proportion who were "very satisfied" with their current trip to Laughlin	93%	96%	95%	94%	92%

VISITOR DEMOGRAPHICS

Seventy-two percent (72%) of Laughlin visitors were married, down from 79% in 2011. Thirty-two percent (32%) of visitors were from Southern California and 5% were foreign visitors, down from 8% in 2012. Four in ten (40%) were 65 or older, down significantly from 47% in 2010, 49% in 2011, and 54% in 2012, but up from 34% last year. Visitors were more likely to be retired (61%, down from 67% in 2012 but up from 53% in 2010) than employed (33%, down from 41% in 2010 and 38% in 2011). Thirty-eight percent (38%) had a high school diploma or less (down significantly from 2010 – 2012 readings). Fifty-four percent (54%) had a household income of less than $60,000, up from 47% in 2012.

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2010	2011	2012	2013	2014
Proportion of visitors who were married	75%	79%	75%	72%	72%
Proportion of visitors who were from Southern California	32%	31%	31%	33%	32%
Proportion of visitors who were foreign	6%	7%	8%	5%	5%
Proportion of visitors who were 50 years old or older	80%	83%	84%	74%	75%
Proportion of visitors 65 years old or older	47%	49%	54%	34%	40%
Average age	60.6	61.8	63.1	57.9	59.1
Proportion of visitors who were retired	53%	57%	67%	62%	61%
Proportion of visitors who were employed	41%	38%	30%	34%	33%
Proportion of visitors with a high school diploma or less	43%	45%	42%	38%	38%
Proportion of visitors with a household income less than $60,000	58%	52%	47%	52%	54%

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, 2014 and December 31, 2014 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2010	2011	2012	2013	2014
Days stayed (average)	4.1	4.2	4.3	4.4	4.5
Nights stayed (average)	3.1	3.2	3.3	3.4	3.5
Proportion of visitors who stayed overnight	98%	99%	97%	97%	96%
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	98%	98%	98%	97%	96%
Lodging expenditures (average per night — non-package)	$38.35	$39.20	$37.26	$41.30	$42.10
Proportion of visitors who bought a package or travel group trip	14%	13%	13%	14%	13%
Average cost of package per person (among package/tour group visitors)	$221.58	$232.92	$235.24	$240.23	$223.17
Number of room occupants (average — hotel/motel only)	2.0	2.0	2.0	2.1	2.0
Average trip expenditures for food and drink	$205.34	$185.30	$122.22	$134.13	$146.52
Average trip expenditures for local transportation	$34.27	$61.03	$57.79	$71.93	$64.97
Average trip expenditures for shopping	$57.72	$65.81	$73.64	$66.15	$65.76
Average trip expenditures for shows	$3.75	$5.08	$5.55	$8.84	$7.87
Average trip expenditures for sightseeing	$3.47	$4.74	$7.73	$6.67	$8.07
Proportion who gambled while visiting Laughlin	99%	99%	100%	100%	99%
Average trip gambling budget (among those who gambled)	$457.46	$537.97	$566.38	$575.30	$619.43

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 2014. 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 2014 study and compares them to the results of the 2010, 2011, 2012, and 2013 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 2014, 87% of visitors said they had visited Laughlin more than once, and 13% were first-time visitors (Figure 1). There were significantly more repeat visitors than in 2010 (82%).

FIGURE 1
First Visit Vs. Repeat Visit

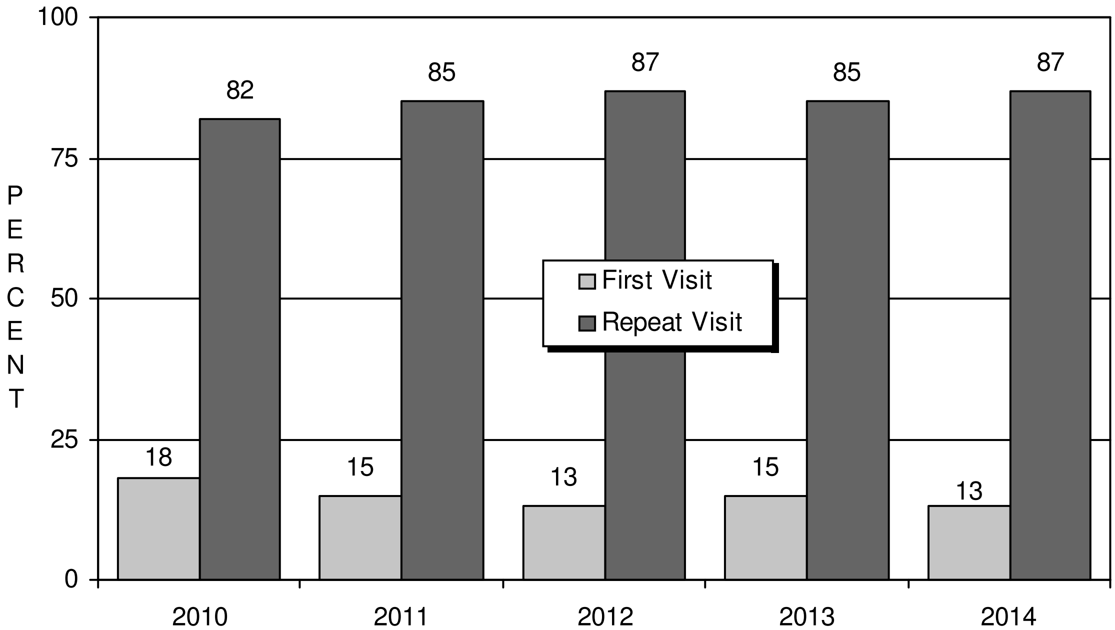
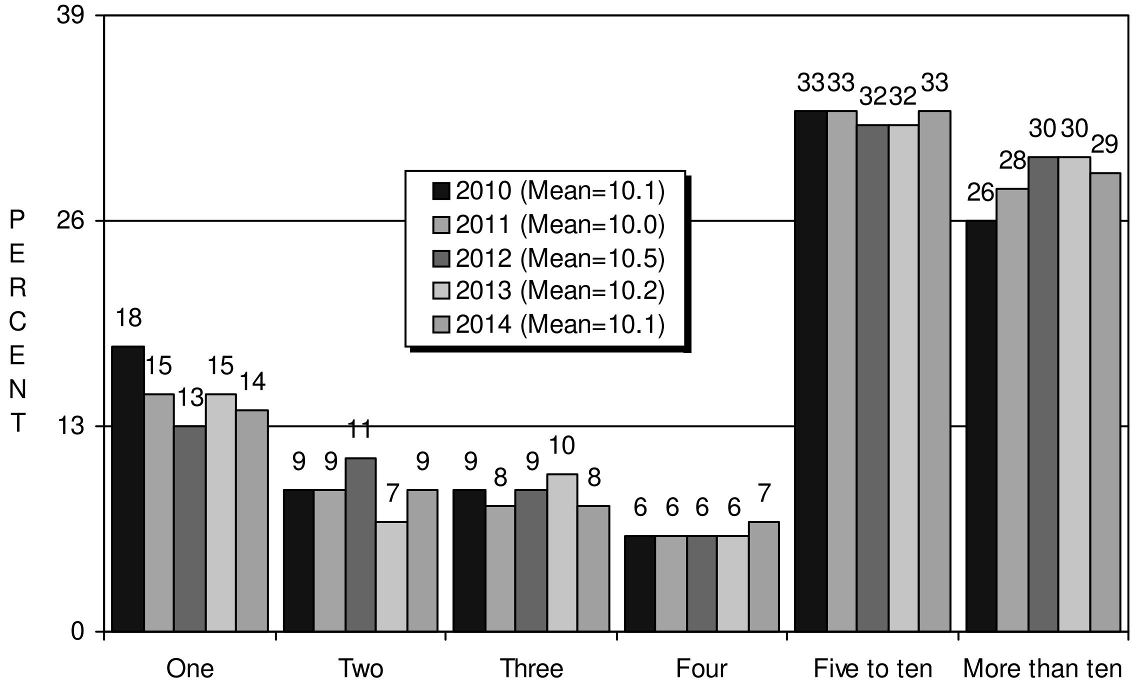
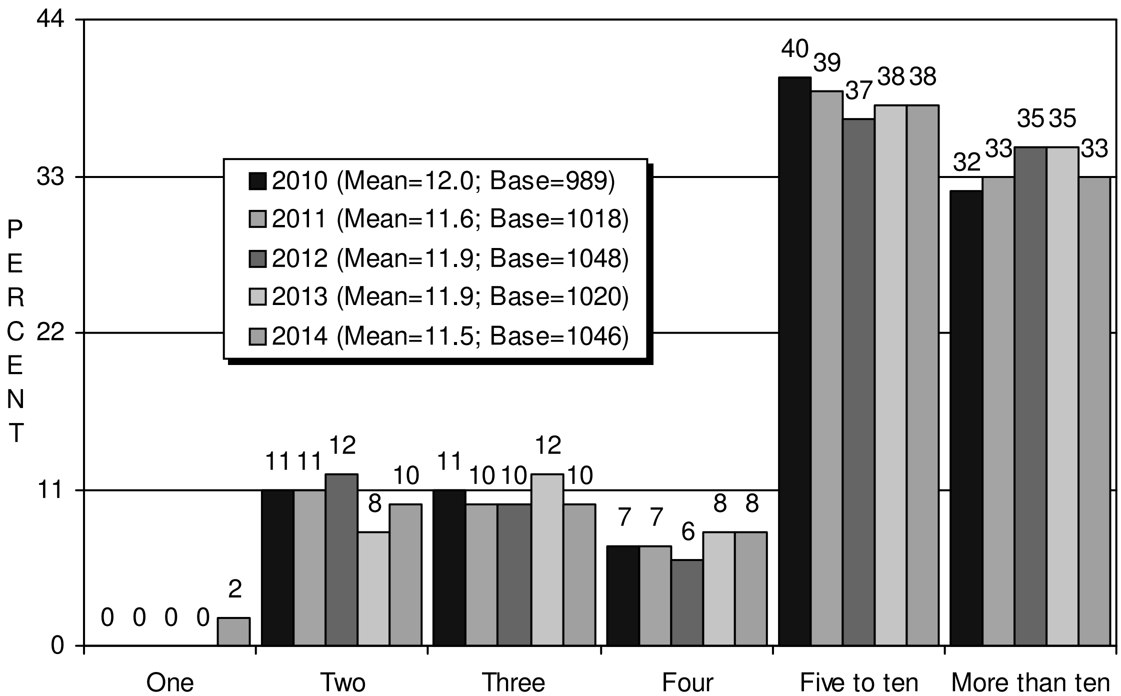


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



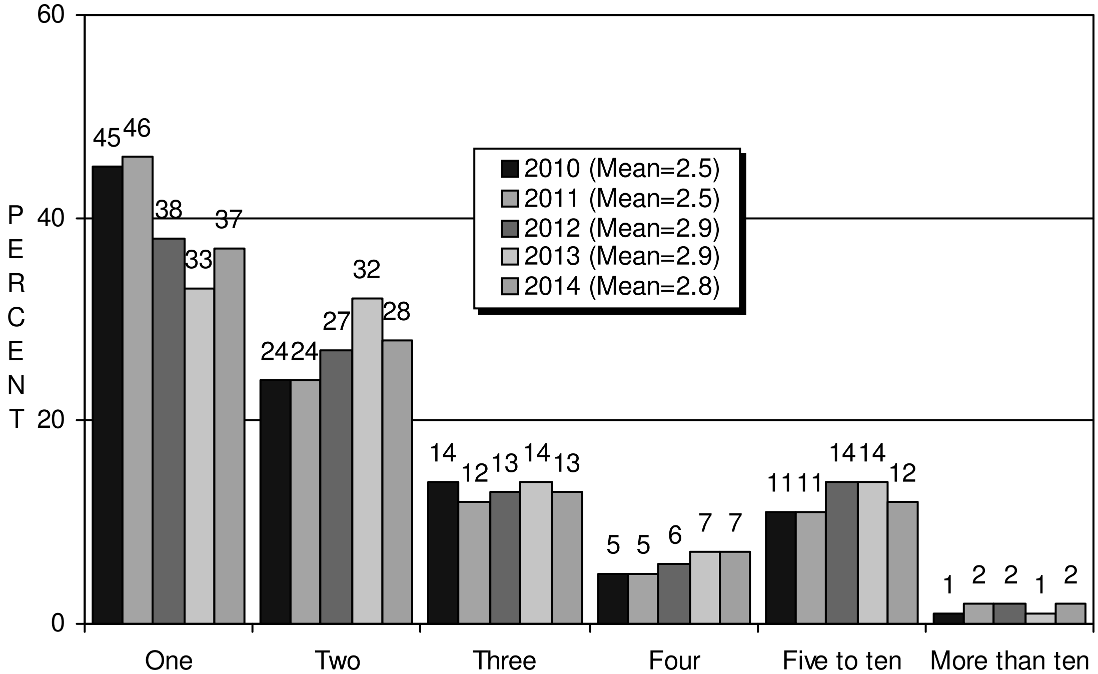
The average number of visits to Laughlin in the past five years among all visitors was 10.1 in this year's survey, not significantly different from the past four years (Figure 2). The proportion of visitors saying they visited only once in the past five years was 14%, significantly lower than in 2010 (18%), while the proportion saying they visited twice (9%) was significantly higher than 7% last year.

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



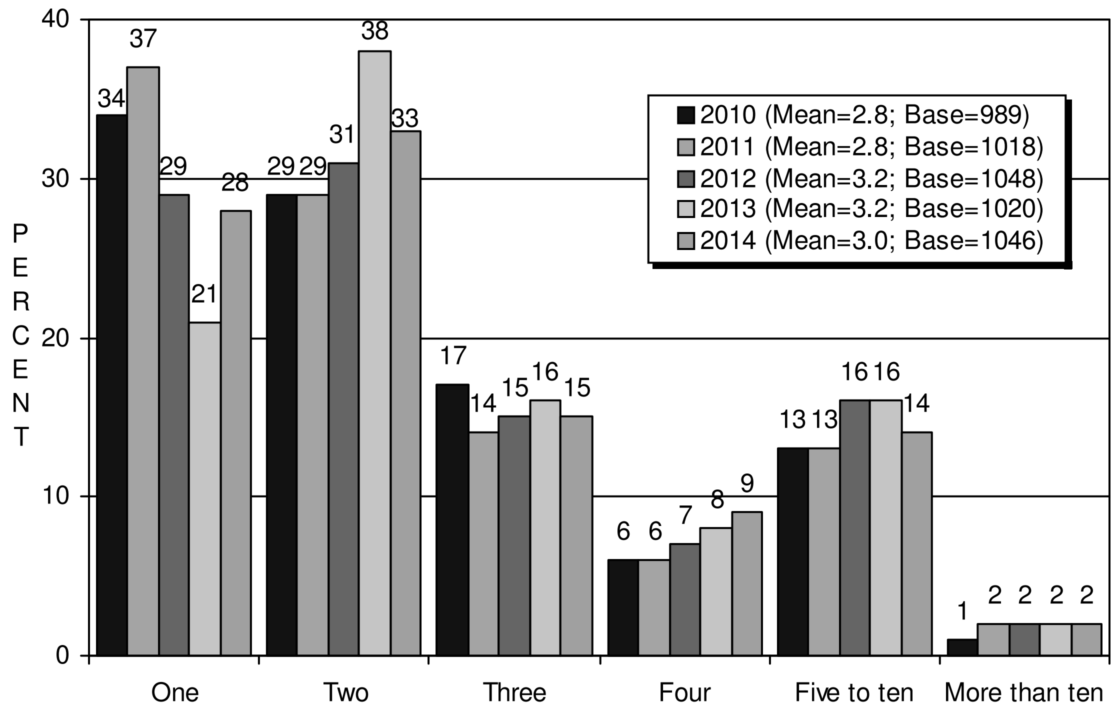
The average number of visits to Laughlin during the past five years among repeat visitors was 11.5, not significantly different from past years (Figure 3). Two percent (2%) of repeat visitors said they had visited Laughlin just once in the past 5 years, up from 2010 – 2013 results, while 10% said they had visited twice in the past 5 years, up from 8% in 2013.

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



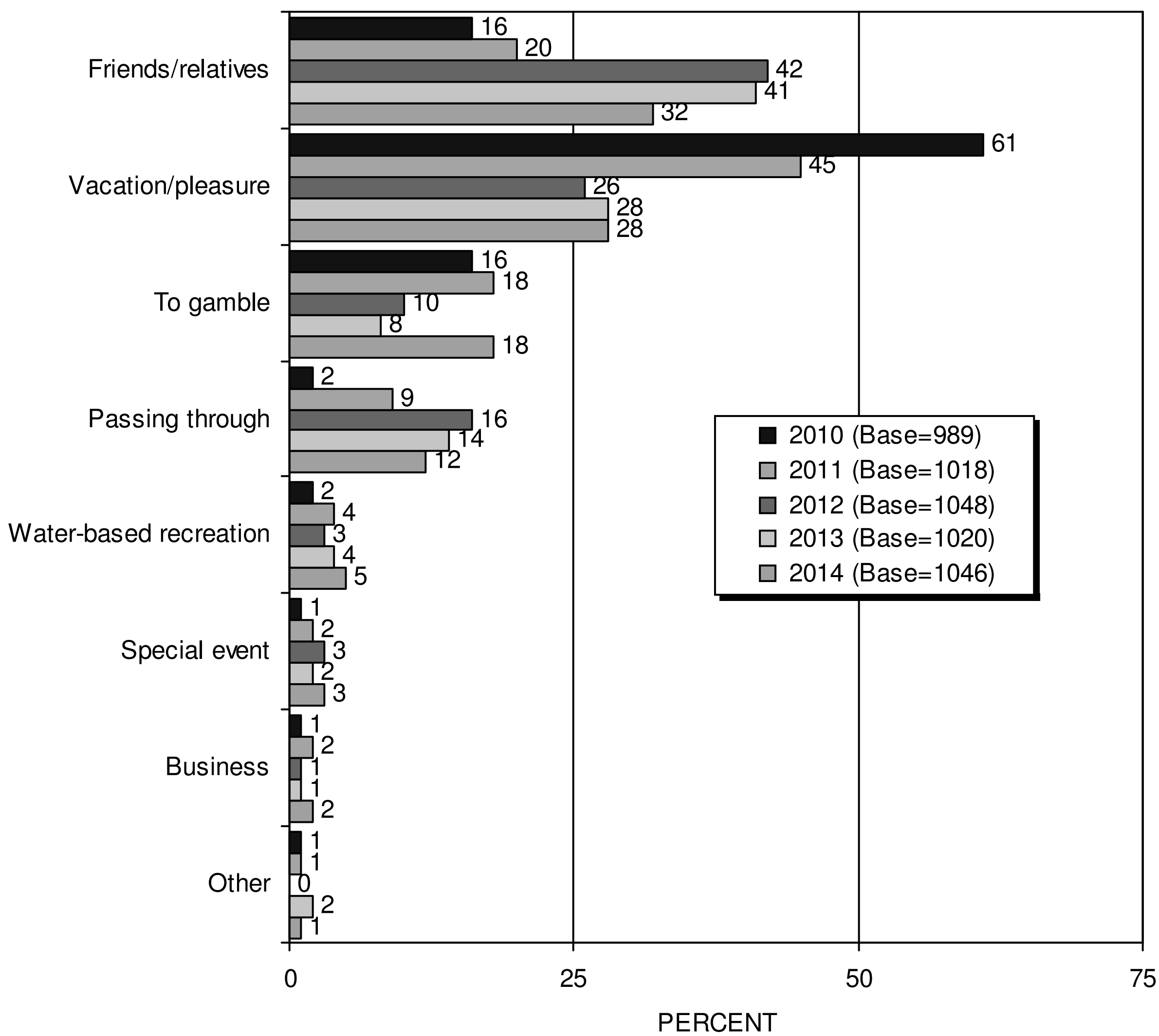
Among all visitors, the average number of visits in the past year was 2.8, up significantly from 2.5 each in 2010 and 2011 (Figure 4). Thirty-seven percent (37%) reported visiting Laughlin only once in the past year (down significantly from 45% in 2010 and 46% in 2011, but up from 33% last year), while 28% reported visiting twice (up significantly from 24% each in 2010 and 2011). The proportions who reported visiting Laughlin four times (7%), in the past five years was up from 5% each in 2010 and 2011.

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



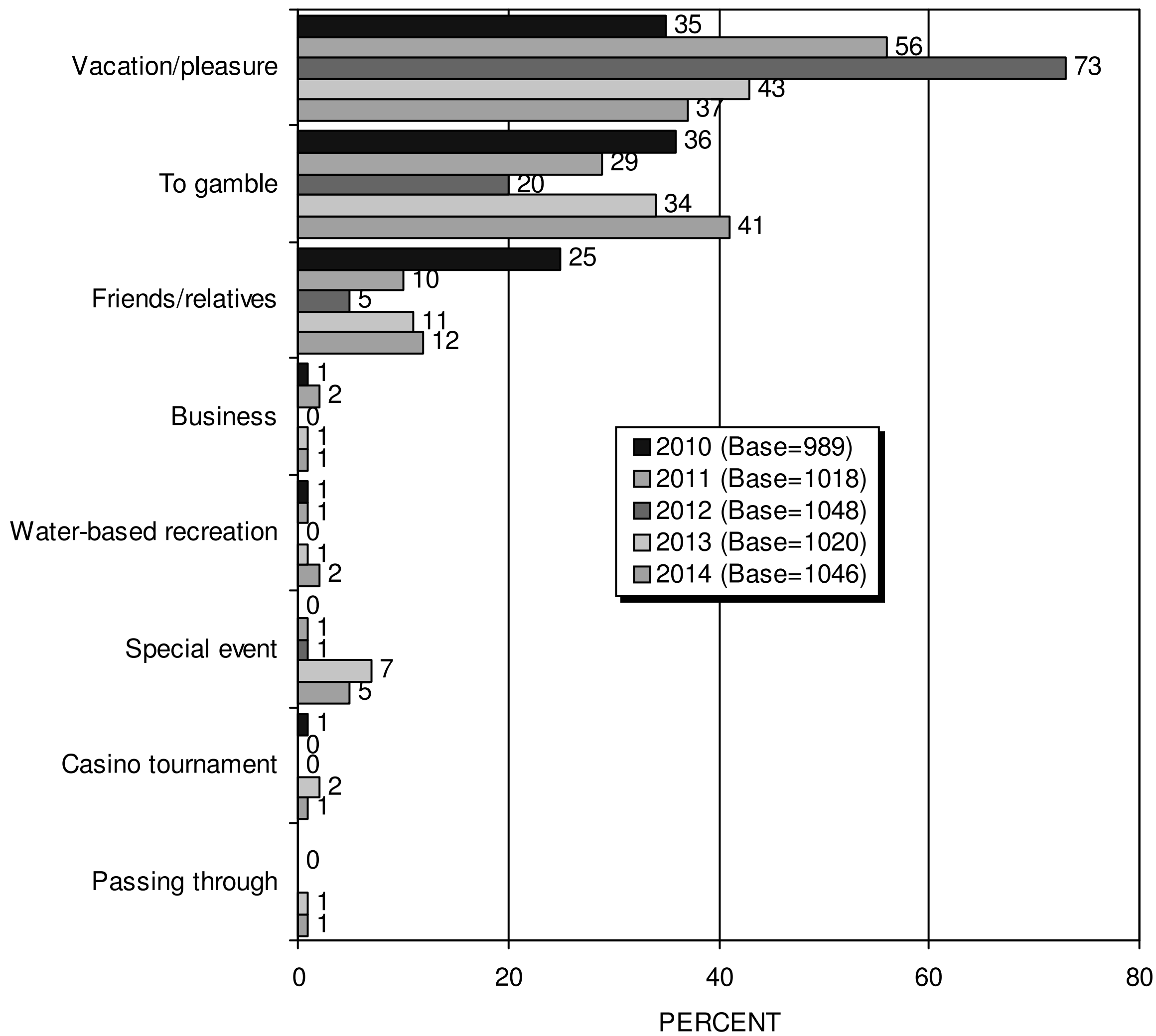
During the past year, repeat visitors averaged 3.0 trips to Laughlin, up significantly from 2.8 each in 2010 and 2011 (Figure 5). Among repeat visitors, 28% reported visiting just once in the past year (down significantly from 34% in 2010 and 37% in 2011, but up from 21% last year), while 33% reported visiting twice (down from 38% last year). Nine percent (9%) reported visiting four times (up significantly from 6% each in 2010 and 2011).

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



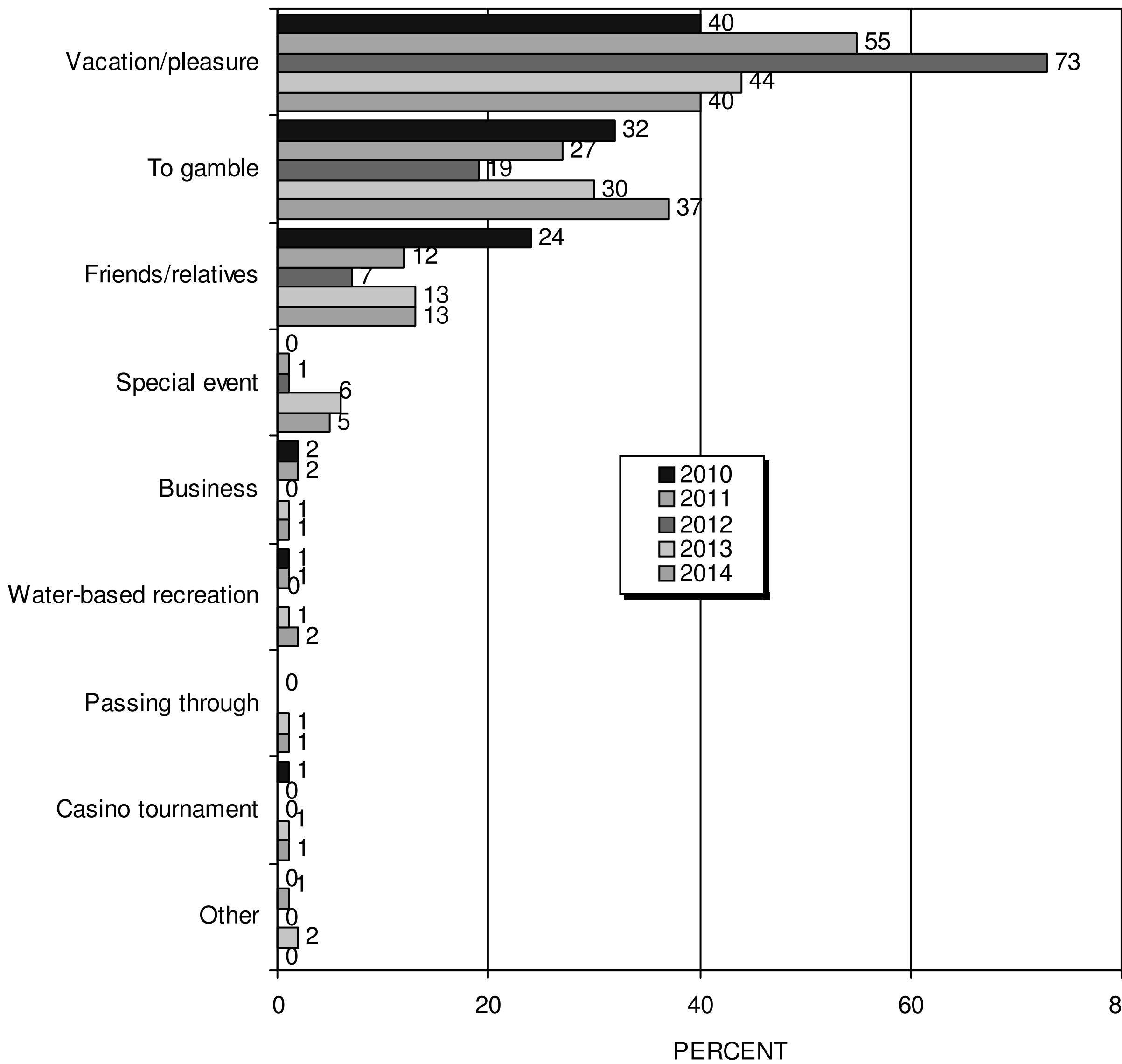
Twenty-eight percent (28%) of repeat visitors said they first came to Laughlin primarily for vacation or pleasure – the same as last year but a significant decrease from 61% in 2010, and 45% in 2011 (Figure 6). Eighteen percent (18%) said they first came to Laughlin for gambling – up significantly from 10% in 2012, and 8% last year. Thirty-two percent (32%) said they first came to Laughlin to visit friends or relatives, a significant increase from 16% in 2010, and 20% in 2011, but down from 42% in 2012 and 41% in 2013. Twelve percent (12%) said they first came to Laughlin because they were just passing through (up from 2% in 2010, but down from 16% in 2012). Three percent (3%) said they first came to Laughlin for a special event, up from 1% in 2010 and 2% each in 2011 and 2013.

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



Among repeat visitors, 37% said that the primary purpose for their current visit to Laughlin was vacation or pleasure, down significantly from 56% in 2011, 73% in 2012, and 43% last year (Figure 7). The proportion who said they came to gamble was 41%, up from 2010 – 2013 results. Twelve percent (12%) said they came to visit friends or relatives, up from 5% in 2012 but down significantly from 25% in 2010. Five percent (5%) said they were visiting Laughlin to attend a special event, up significantly from 2010 – 2012.

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



Among all visitors in 2014, 40% reported that the primary purpose for their current visit to Laughlin was vacation or pleasure, down significantly from 55% in 2011, 73% in 2012, and 44% last year (Figure 8). Thirty-seven percent (37%) of all visitors said gambling was the primary reason for their current visit, up from 2010 – 2013 results. Thirteen percent (13%) said they came to visit friends or relatives, up 7% in 2012 but down from 24% in 2010. Five percent (5%) said they were visiting Laughlin to attend a special event, up from less than 1% in 2010 and 1% each in 2011 and 2012.

FIGURE 9
Primary Purpose Of First Visit Vs. Current Visit — 2014
(Among Repeat Visitors)

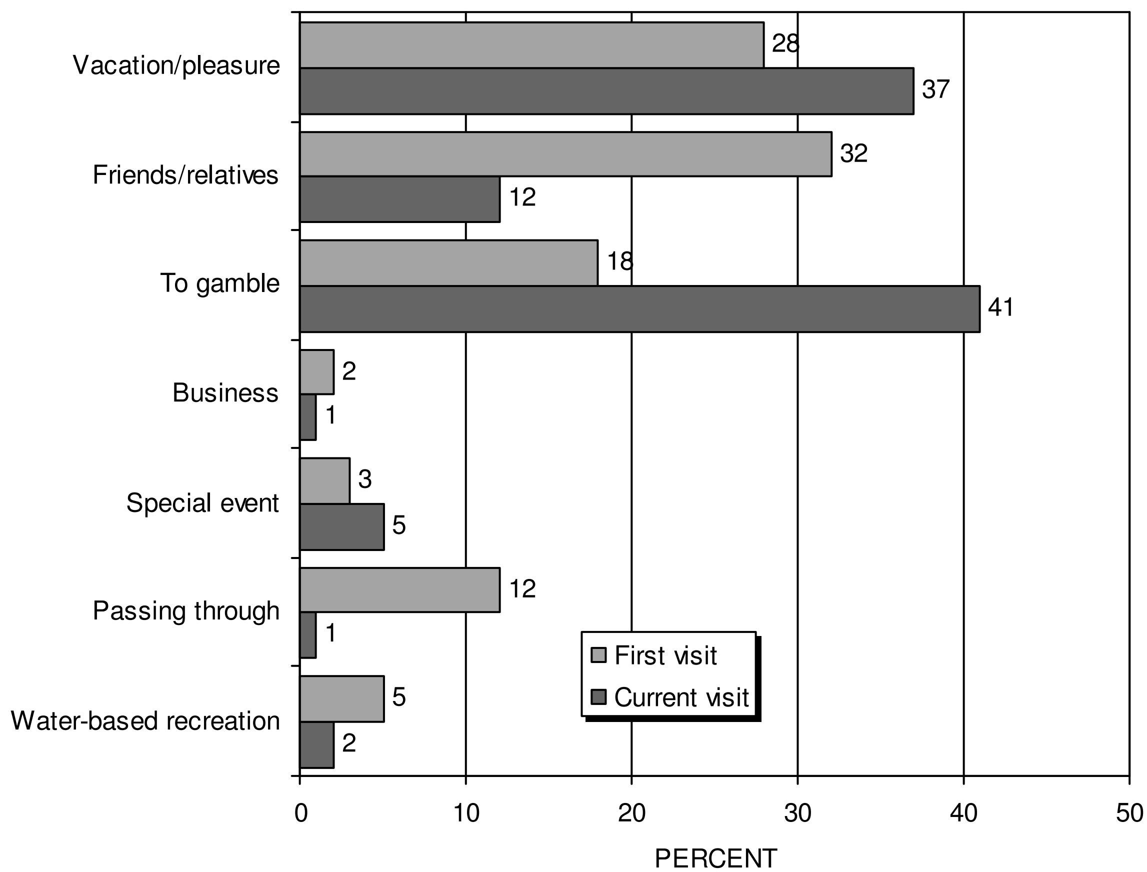


Figure 9 compares the primary purpose given by repeat visitors for their first visit to Laughlin versus the primary reason for their current visit in 2014. Repeat visitors were more likely to first visit Laughlin to visit friends or relatives (32% vs. 12% who did so on their current visit) to say they were just passing through (12% vs. 1%), or to say they were visiting Laughlin for water-based recreation (5% vs. 2%). By contrast, repeat visitors were more likely to say their current visit to Laughlin was for vacation or pleasure (37% vs. 28% who did so on their first visit) or to gamble (41% vs. 18%).

FIGURE 10
Primary Purpose Of Current Visit — 2014
(First-Time Vs. Repeat Visitors)

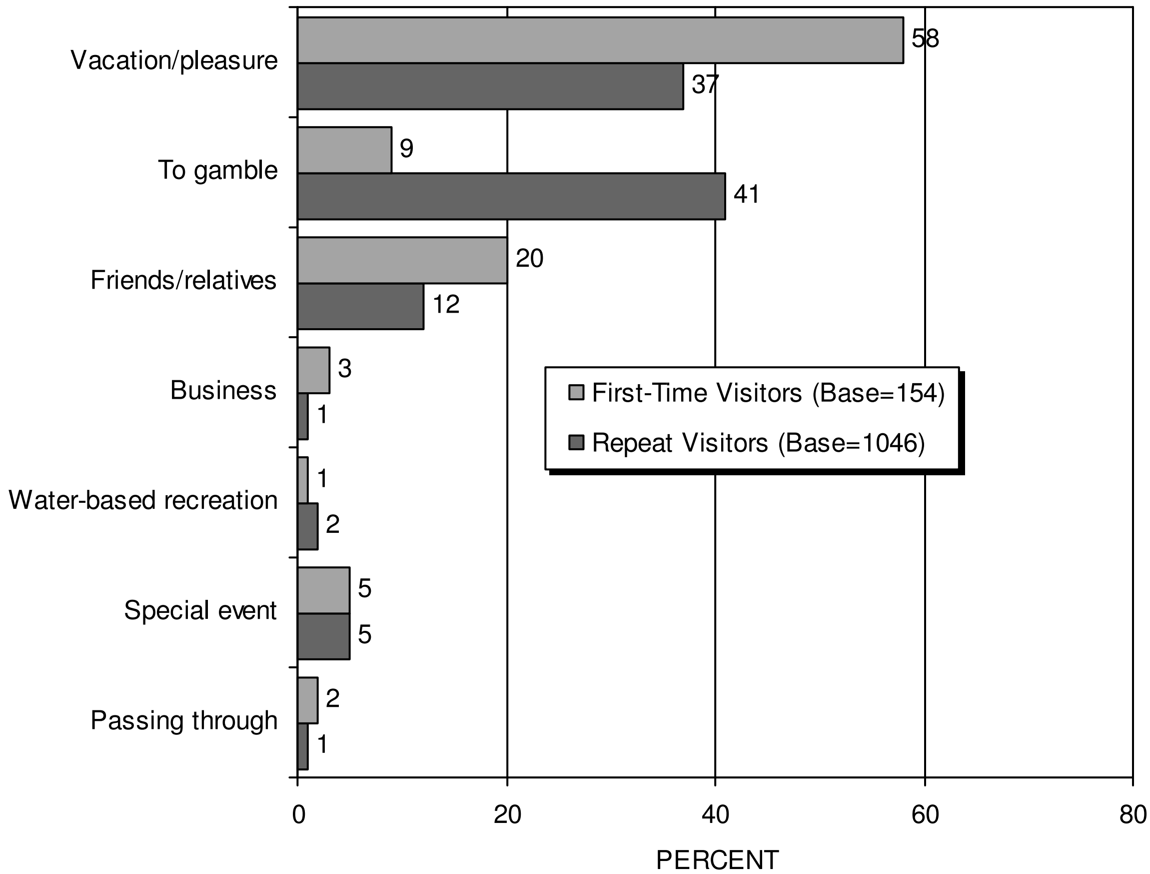
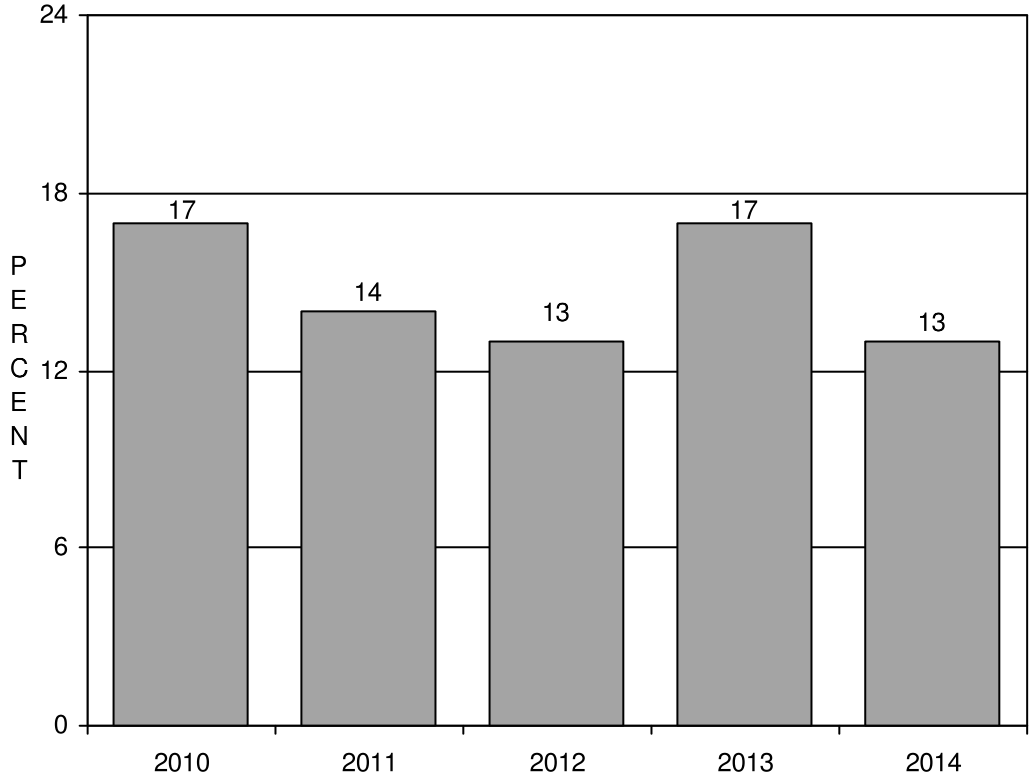


Figure 10 compares first-time visitors with repeat visitors in terms of the purpose of their *current* visit to Laughlin in 2014. First-time visitors were significantly more likely than repeat visitors to say their current visit to Laughlin was for vacation or pleasure (58% vs. 37%) or to visit friends or relatives (20% vs. 12%), while repeat visitors were significantly more likely than first-time visitors to say they were visiting Laughlin primarily to gamble (41% vs. 9%).

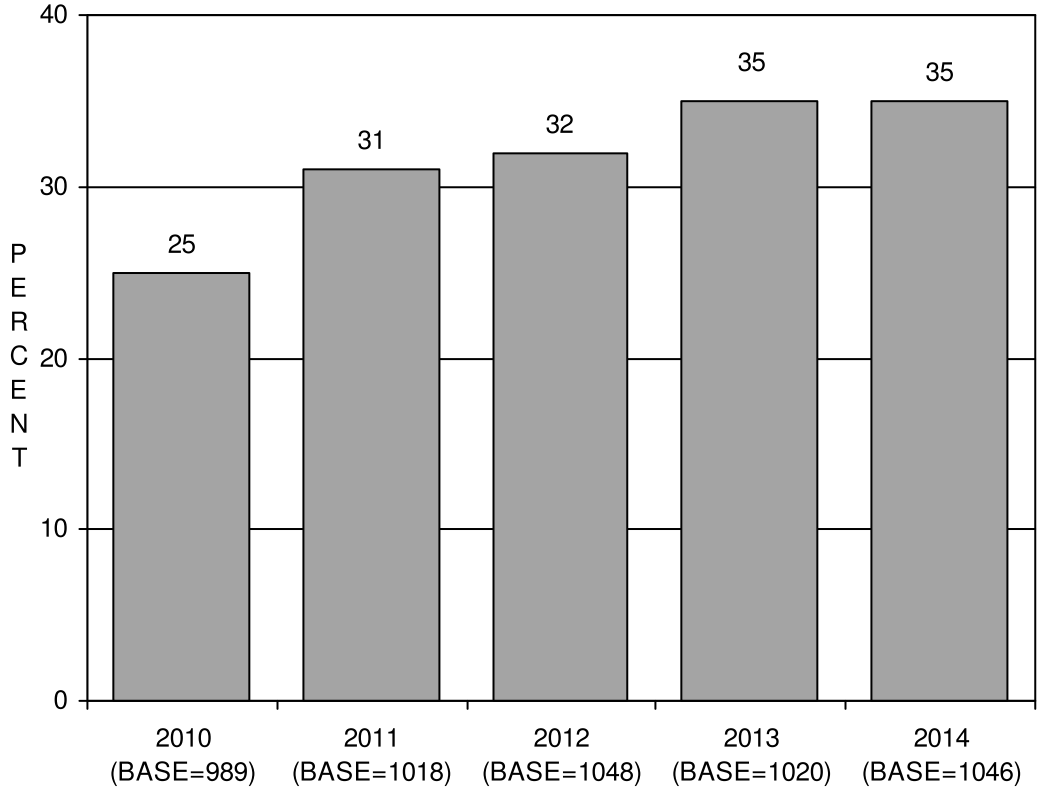
FIGURE 11
Gaming Tournaments*



We inquired directly about participation in gaming tournaments in Laughlin (Figure 11). In 2014, 13% said they planned to participate in a gaming tournament, down significantly from 17% each in 2010 and 2013.

* 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 a rodeo, a car or motorcycle rally, or an outdoor concert (Figure 12). Thirty-five percent (35%) said they had, the same as last year, but significantly more than in 2010 (25%) and 2011 (31%).

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

TRAVEL PLANNING

Travel planning varied broadly — from same-day planning to travel plans made more than 90 days in advance (Figure 13). Just under one-half (48%) of visitors planned their Laughlin trip seven to 30 days in advance (down significantly from 54% in 2010), while 35% planned their trip more than 30 days in advance (up from 29% in 2010). Specifically, the proportion planning their trip seven to 14 days in advance (19%) was down significantly from 29% in 2010 and 25% in 2011, while the proportion planning their trip more than 90 days in advance (12%) was up significantly from 1% in 2010 and 5% in 2011. Three percent (3%) said they planned their trip on the same day they traveled to Laughlin, down from 6% in 2010.

FIGURE 13
Advance Travel Planning

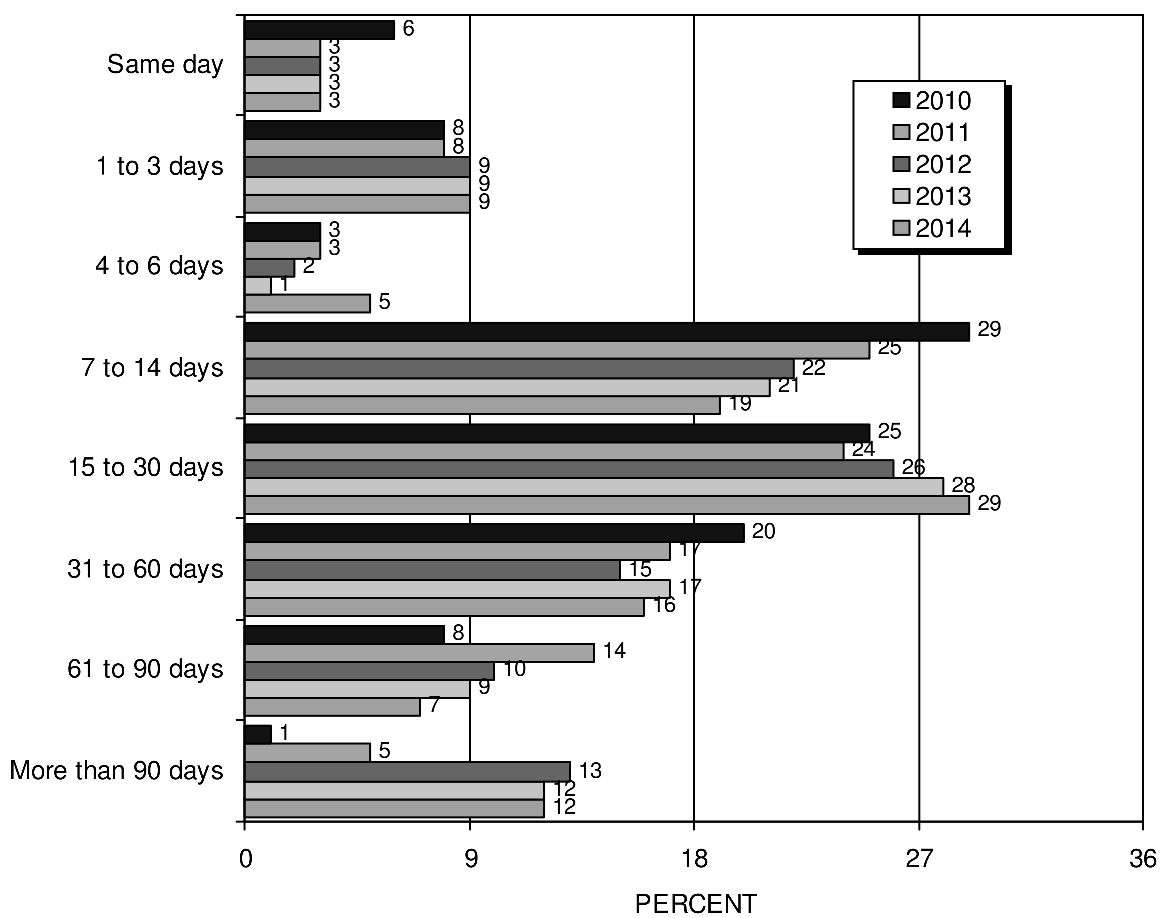
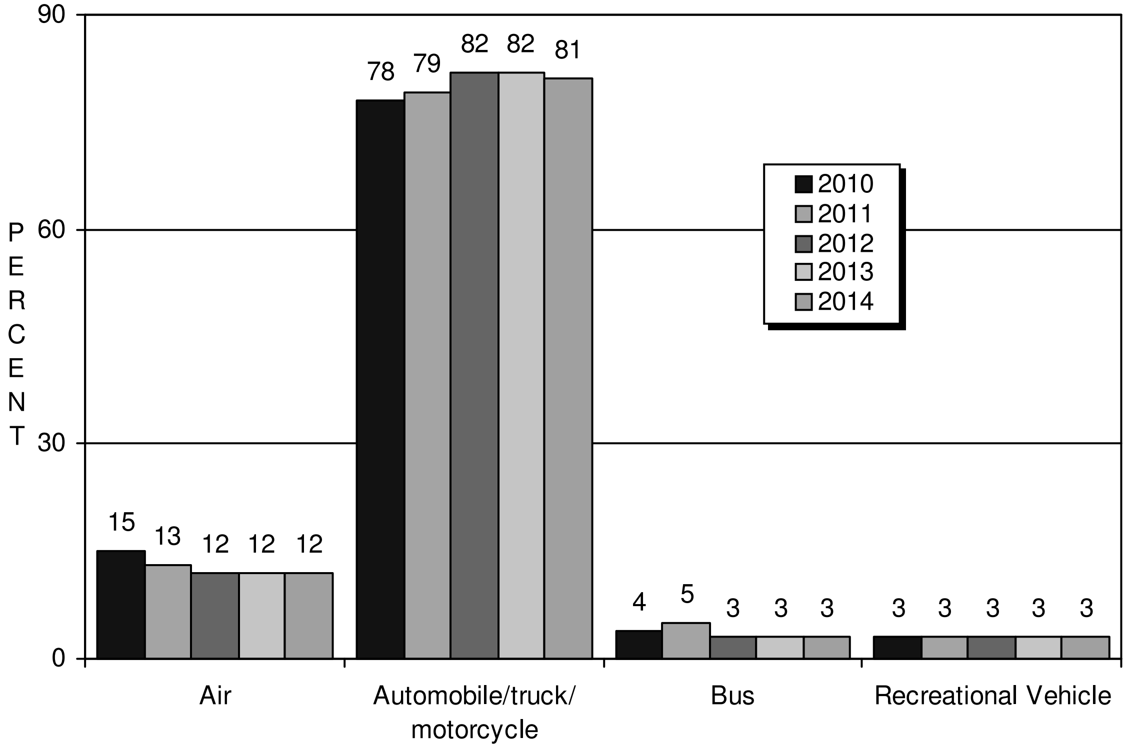
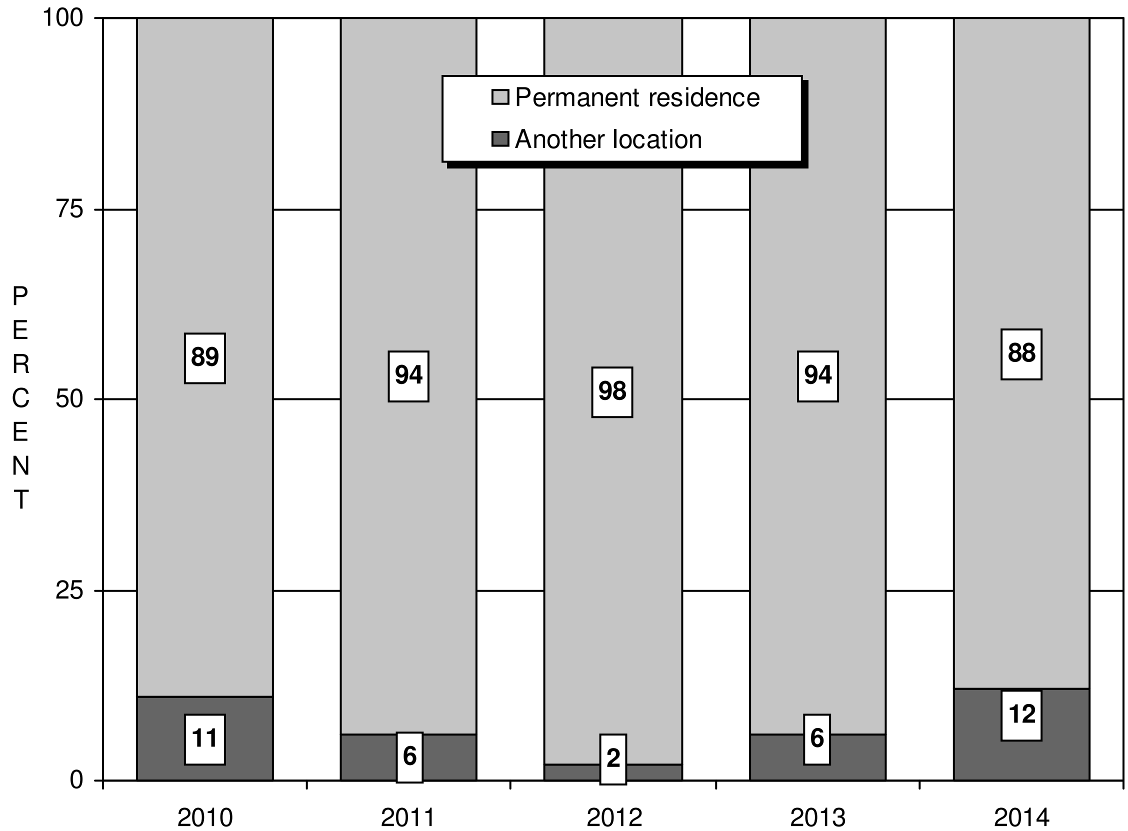


FIGURE 14
Transportation To Laughlin



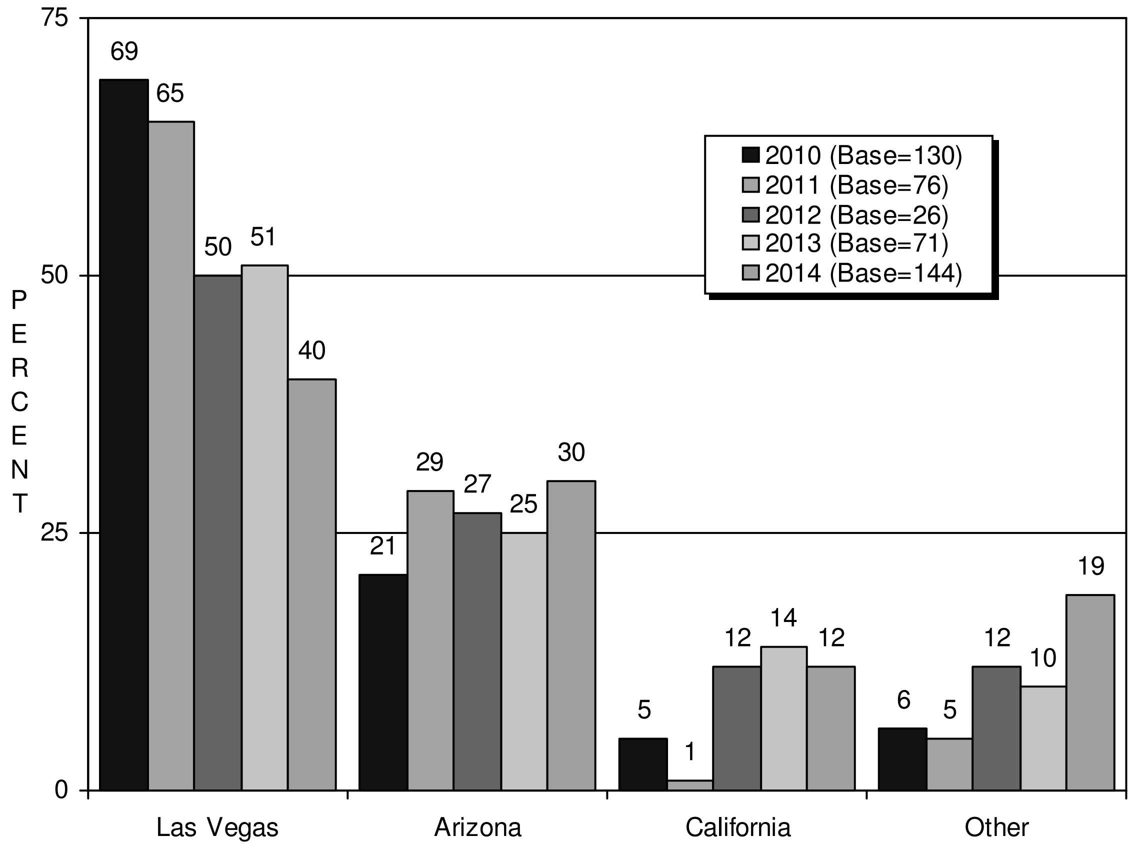
As in past years, most visitors traveled to Laughlin by automobile, truck, or motorcycle (81%, up significantly from 78% in 2010) (Figure 14). Twelve percent (12%) said they came by air (down from 15% in 2010), 3% traveled by bus (down from 4% in 2010 and 5% in 2011), and another 3% came in an RV.

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



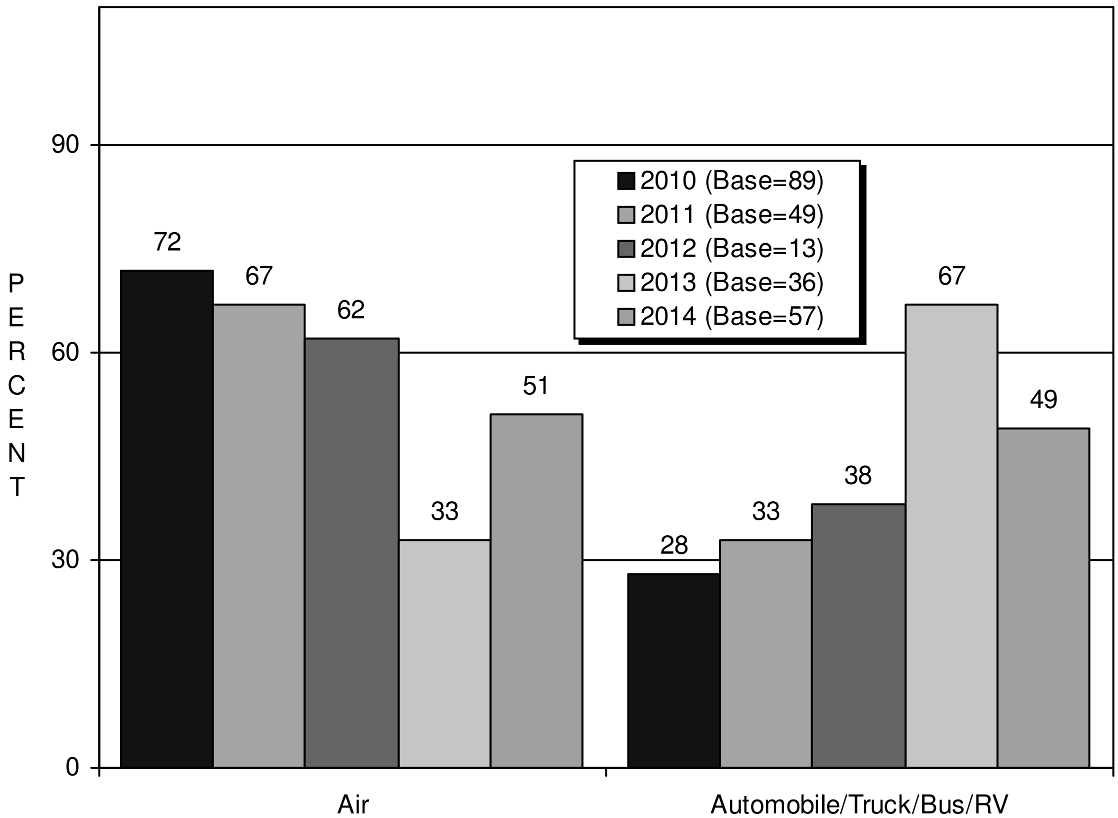
As in the past, most visitors arrived in Laughlin directly from their permanent residences (88%, down from 94% in 2011, 98% in 2012, and 94% last year) (Figure 15).

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



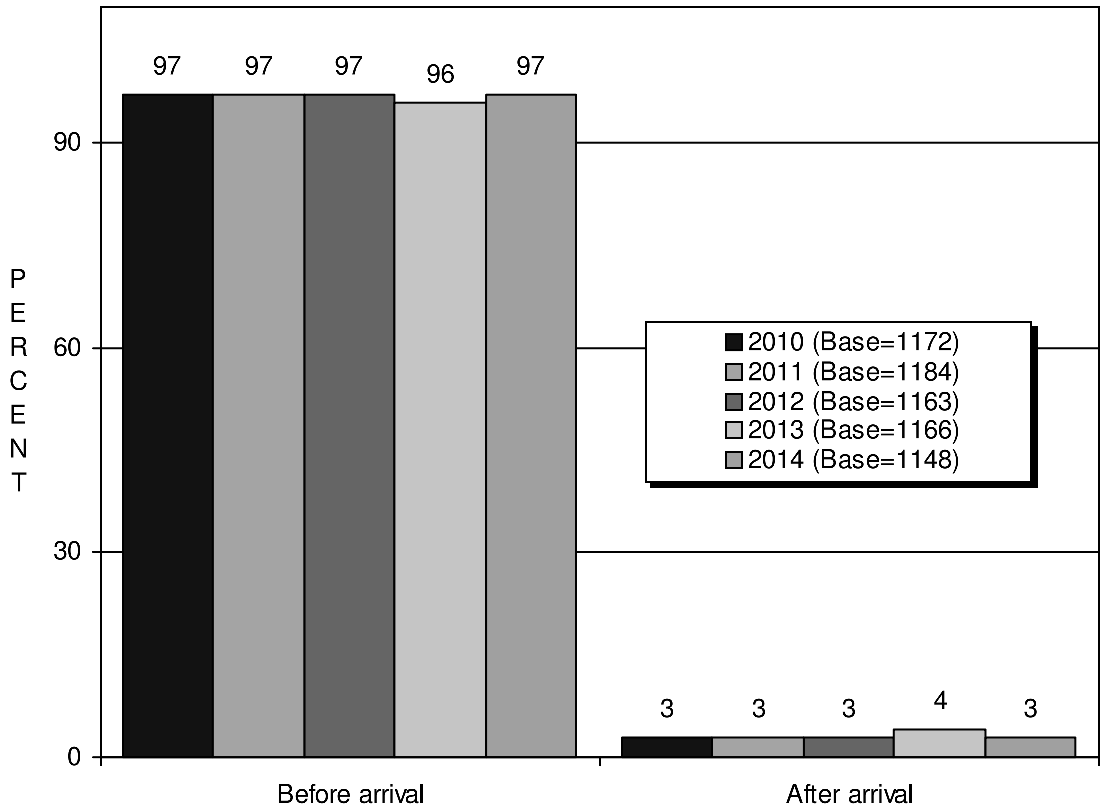
Among those who came to Laughlin after visiting another location (Figure 16), four in ten (40%) came from Las Vegas (down from 69% in 2010 and 65% in 2011). Thirty percent (30%) came from Arizona, while 12% came from California (up from 5% in 2010 and 1% in 2011), and 19% from elsewhere (up from 6% in 2010 and 5% in 2011).

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



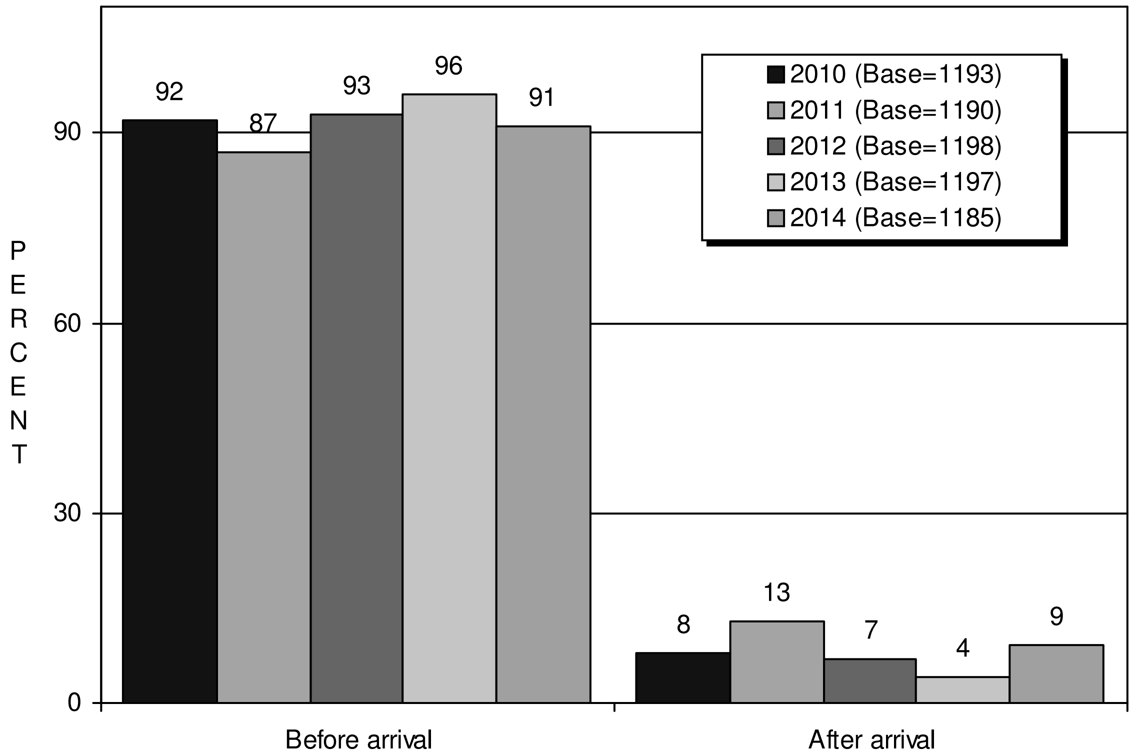
We asked visitors who came to Laughlin from Las Vegas how they had traveled to Las Vegas (Figure 17). Just over one-half (51%) said they arrived by air (down from 72% in 2010), while 49% arrived by ground transportation (up from 28% in 2010).

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



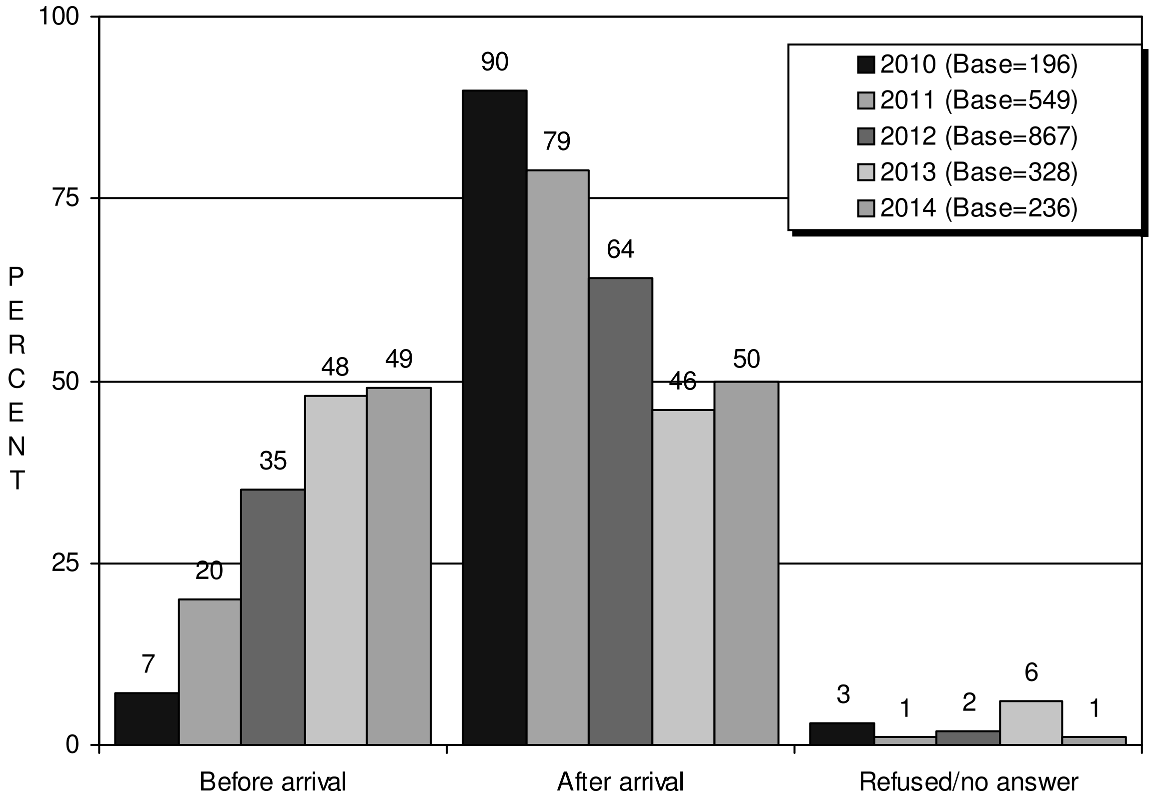
Most visitors decided where to stay in Laughlin prior to their visits (97% similar to past results), while 3% decided after arrival (Figure 18).

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



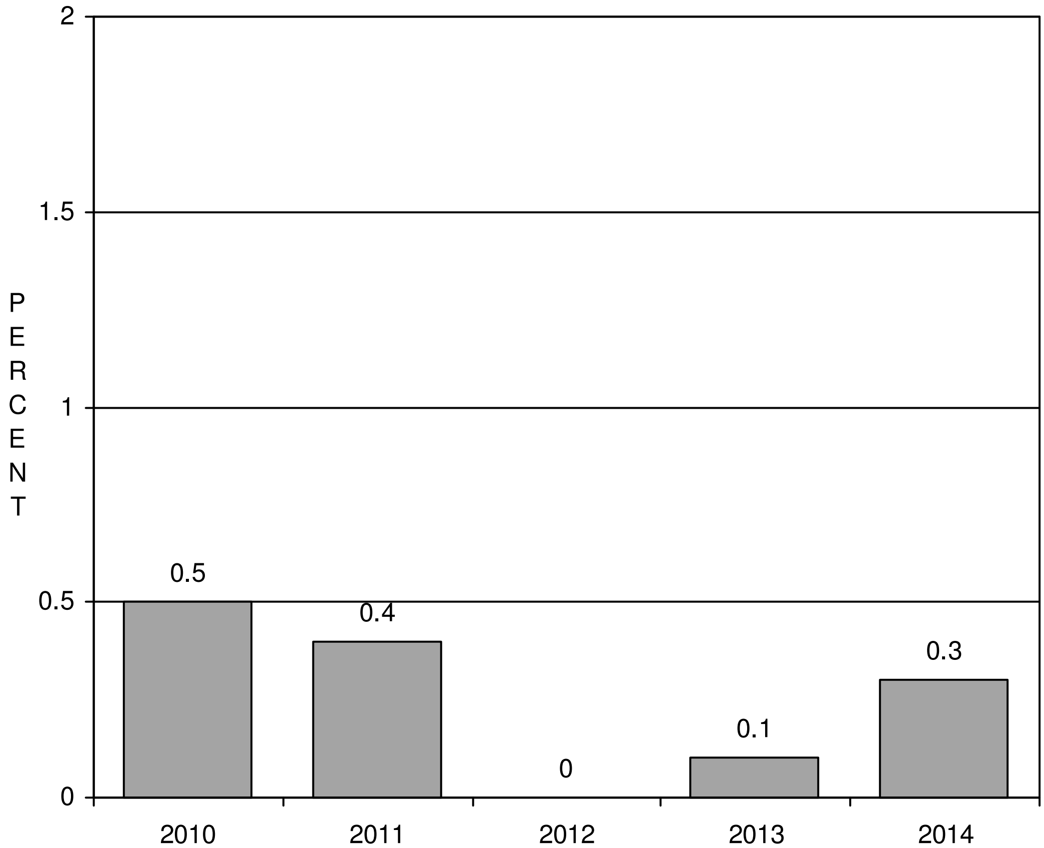
Ninety-one percent (91%) of visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin (Figure 19), up significantly from 87% in 2011, but down from 96% last year. Nine percent (9%) reported making their decision about where to gamble after they arrived in Laughlin, down from 13% in 2011 but up from 4% in 2013.

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



Among visitors who reported going to see a show, 49% said they decided what shows to see before their arrival in Laughlin, up significantly from 7% in 2010, 20% in 2011, and 35% in 2012 (Figure 20). Fifty percent (50%) said they decided what shows to see after arriving in Laughlin, down from 90% in 2010, 79% in 2011, and 64% in 2012.

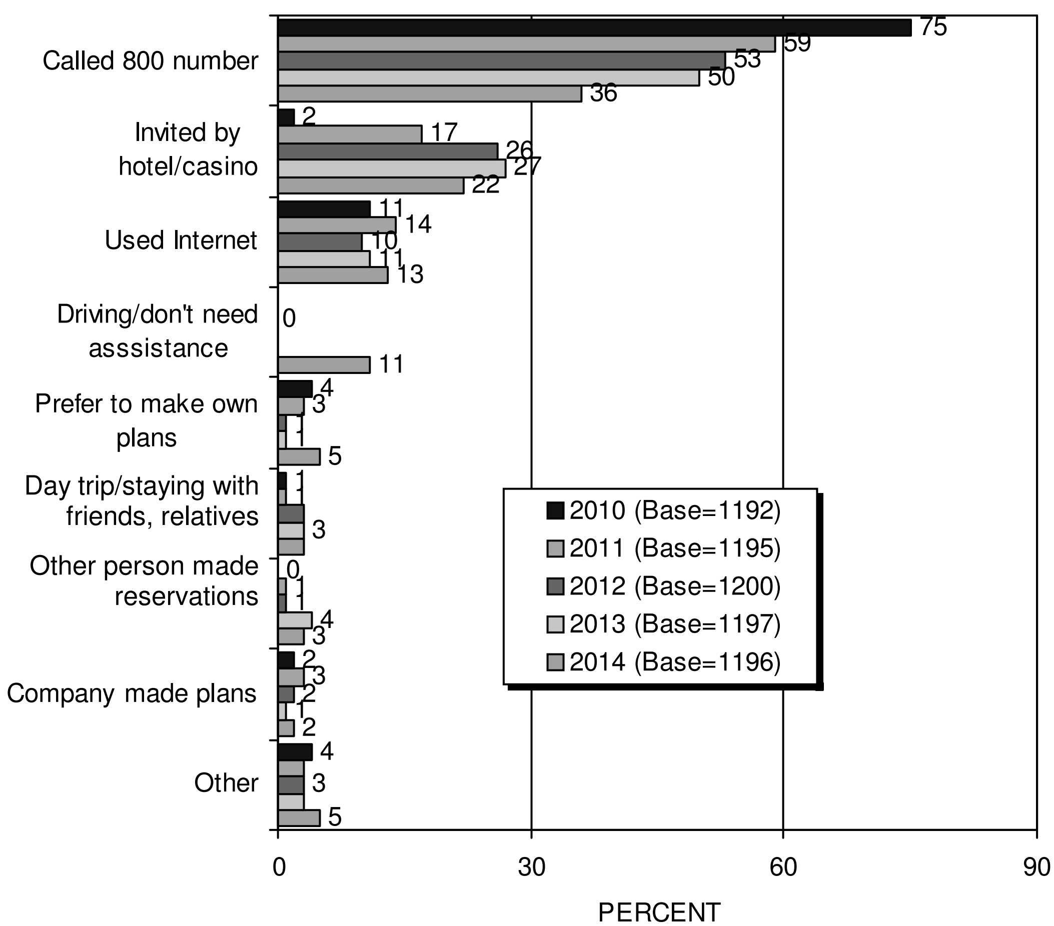
FIGURE 21
Travel Agent Assistance*
(Among All Visitors)



In 2014, only four visitors to Laughlin said they were assisted in their travel planning by a travel agent (Figure 21).

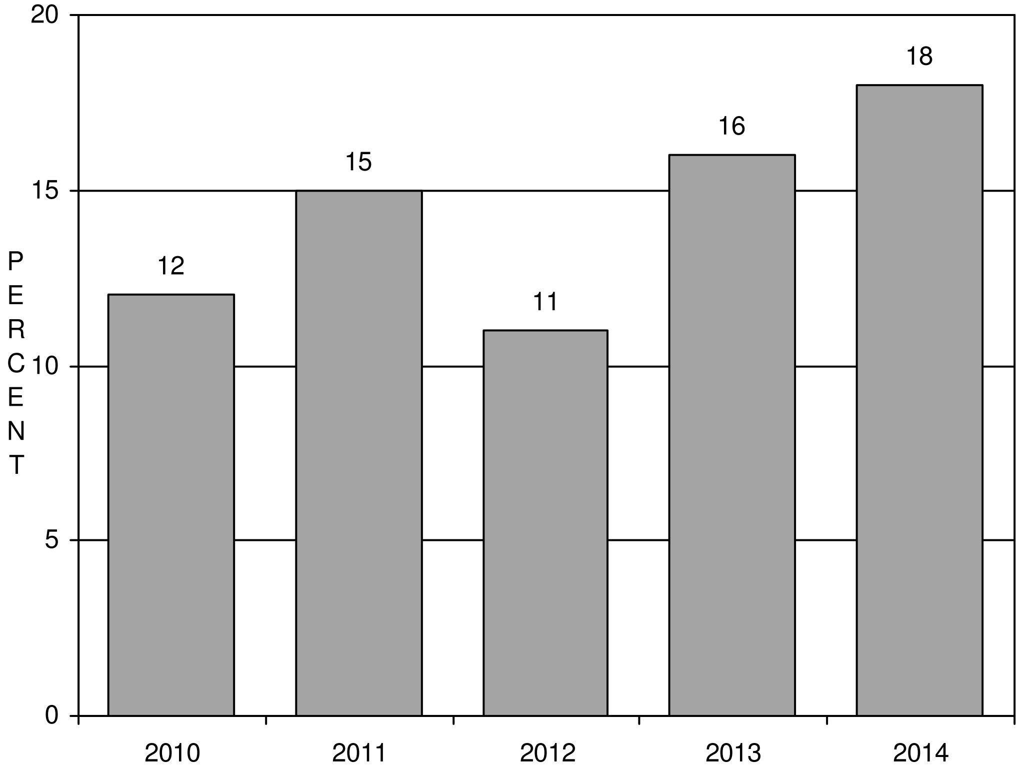
* Only “yes” responses are reported in this chart.

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). Thirty-six percent (36%) said it was because they used an 800 number, down significantly from 2010 – 2013. Twenty-two percent (22%) said they got an invitation from a hotel/casino, up from 2% in 2010 and 17% in 2011, but down from 26% in 2012 and 27% last year. Thirteen percent (13%) said they used the Internet to make their travel arrangements, up significantly from 10% in 2012. Eleven percent (11%) said they were driving and so didn't need assistance, up from 2010 – 2013. Five percent (5%) said they prefer to make their own plans, up from 2011 – 2013, while 3% each explained that someone else made the reservations (up from 2010 – 2012), or that it was because it was a daytrip or they were staying with friends or relatives (up from 1% each in 2010 and 2011).

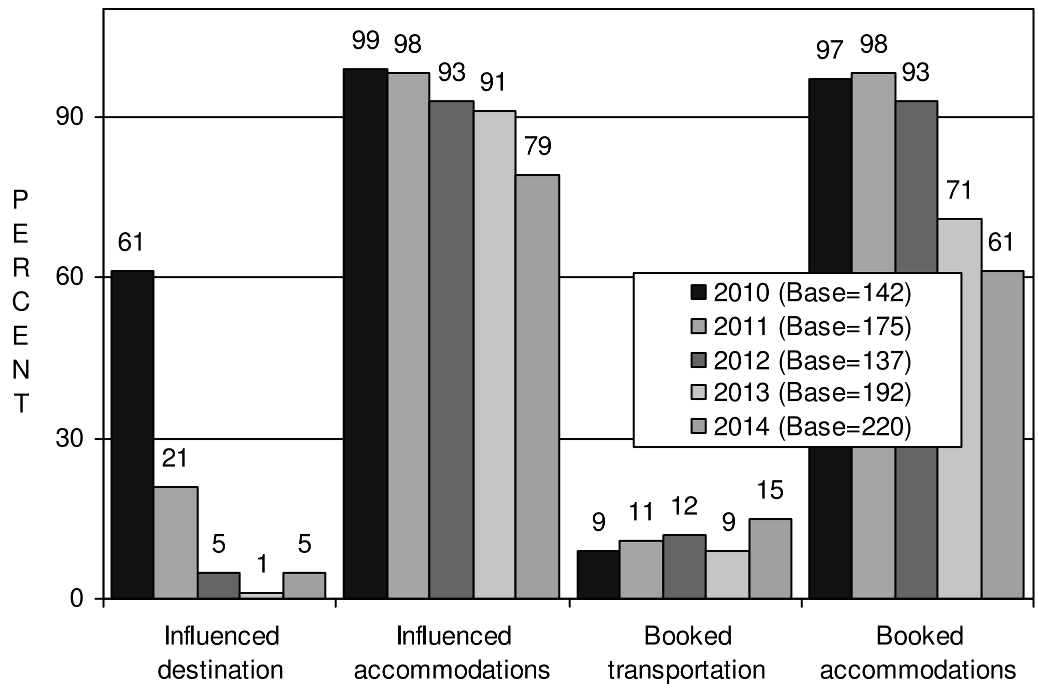
FIGURE 23
Whether Used Internet To Plan Trip*



In 2014, 18% of visitors said they used the Internet to plan their trip to Laughlin, up significantly from 12% in 2010, 15% in 2011 and 11% in 2012 (Figure 23).

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

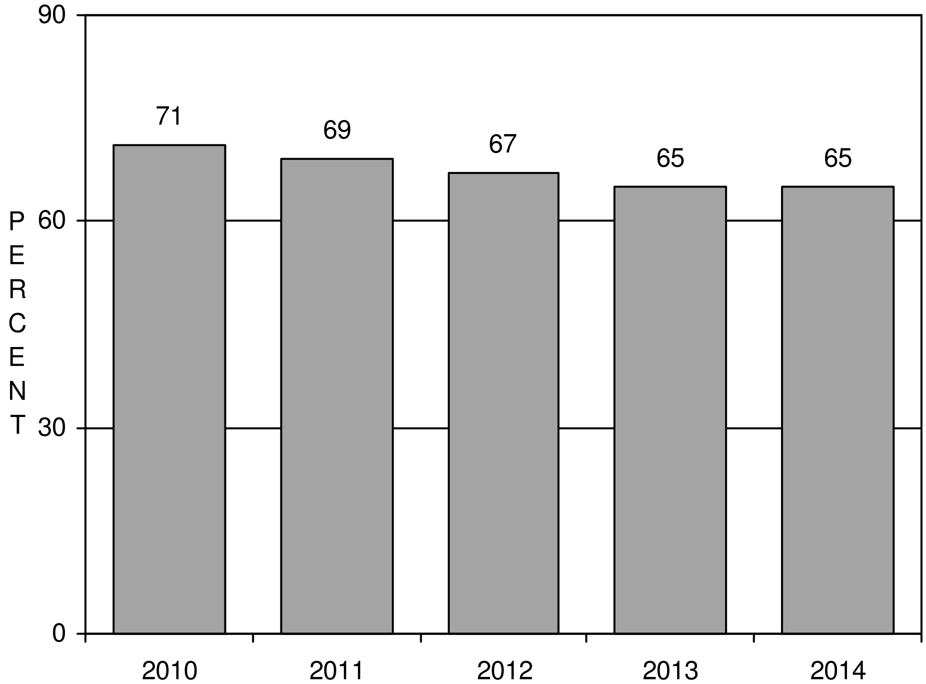
FIGURE 24
Internet Influence And Use*
(Among Those Who Used Internet To Plan Trip)



Among visitors who used the Internet to plan their trip, six in ten (61%) booked their accommodations online (down significantly from 97% in 2010, 98% in 2011, 93% in 2012, and 71% last year) (Figure 24). Eight in ten (79%) said the Internet influenced their choice of accommodations (down from 99% in 2010, 98% in 2011, 93% in 2012, and 91% last year). Fifteen percent (15%) said they booked transportation to Laughlin online, not significantly different from past years. Five percent (5%) also said the Internet influenced their decision to visit Laughlin, down significantly from 61% in 2010 and 21% in 2011, but up from 1% last year.

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

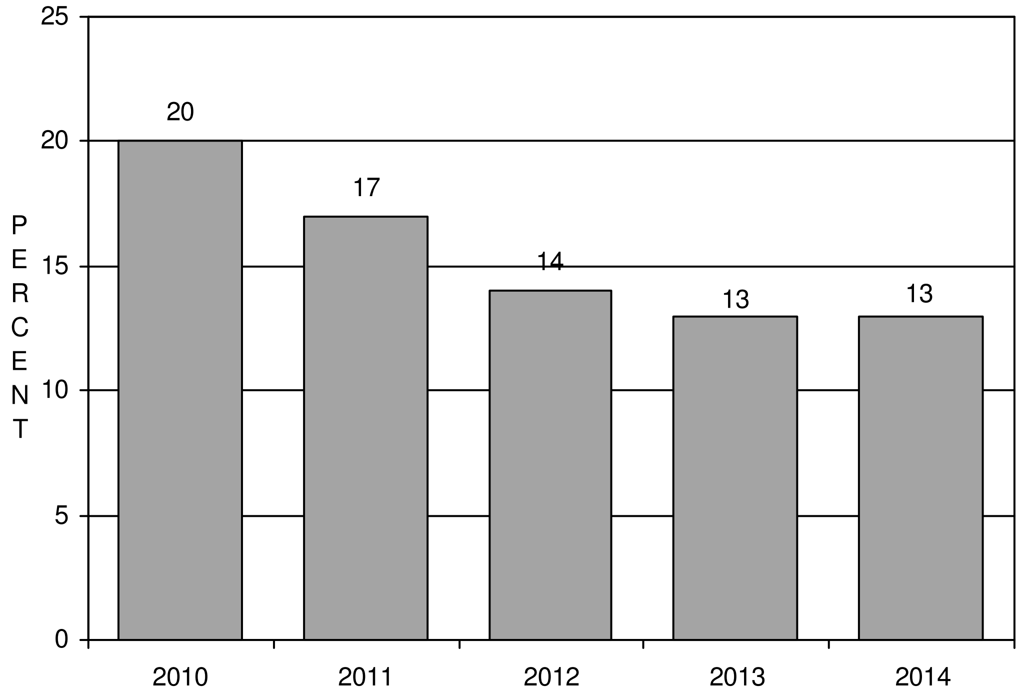
FIGURE 25
Whether Visited Las Vegas During Past Five Years*



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

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

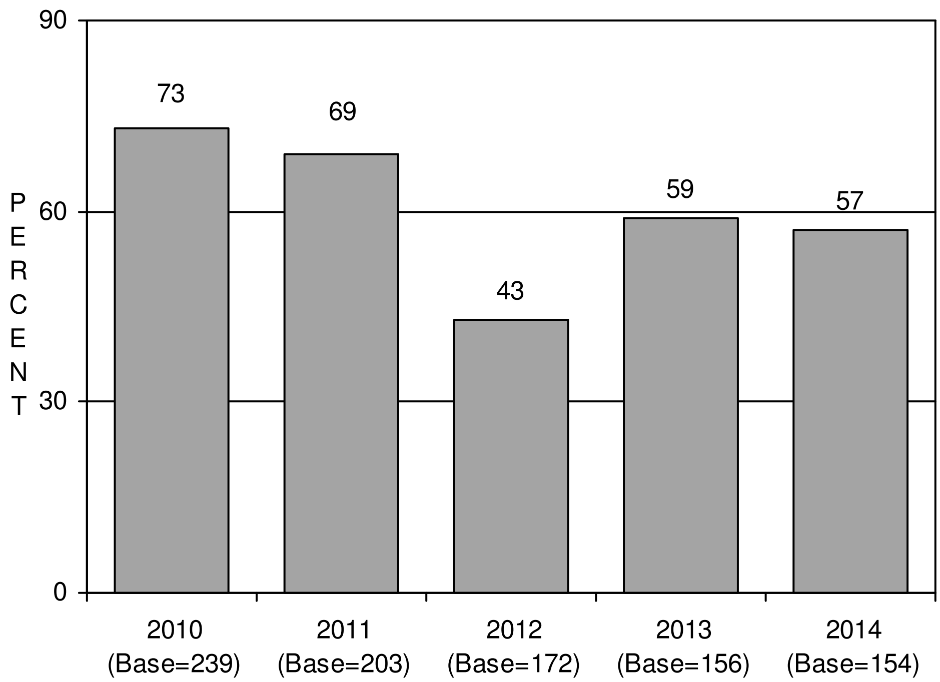
FIGURE 26
Visiting Las Vegas
On This Trip To Laughlin*



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

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

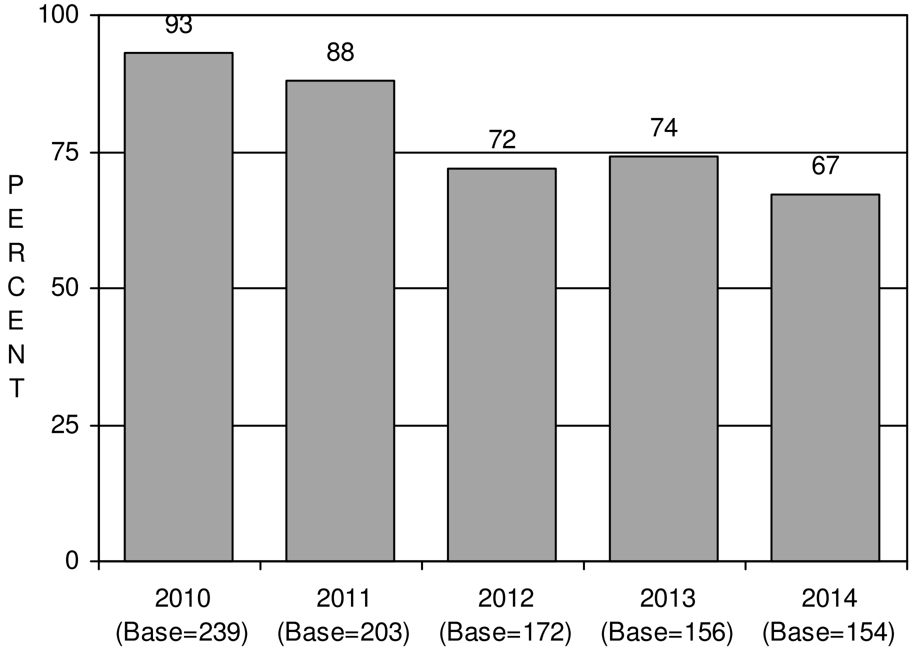
FIGURE 27
Visiting Downtown Las Vegas*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, 57% said they had visited or intended to visit Downtown, up from 43% in 2012 but down from 73% in 2010, and 69% in 2011 (Figure 27).

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

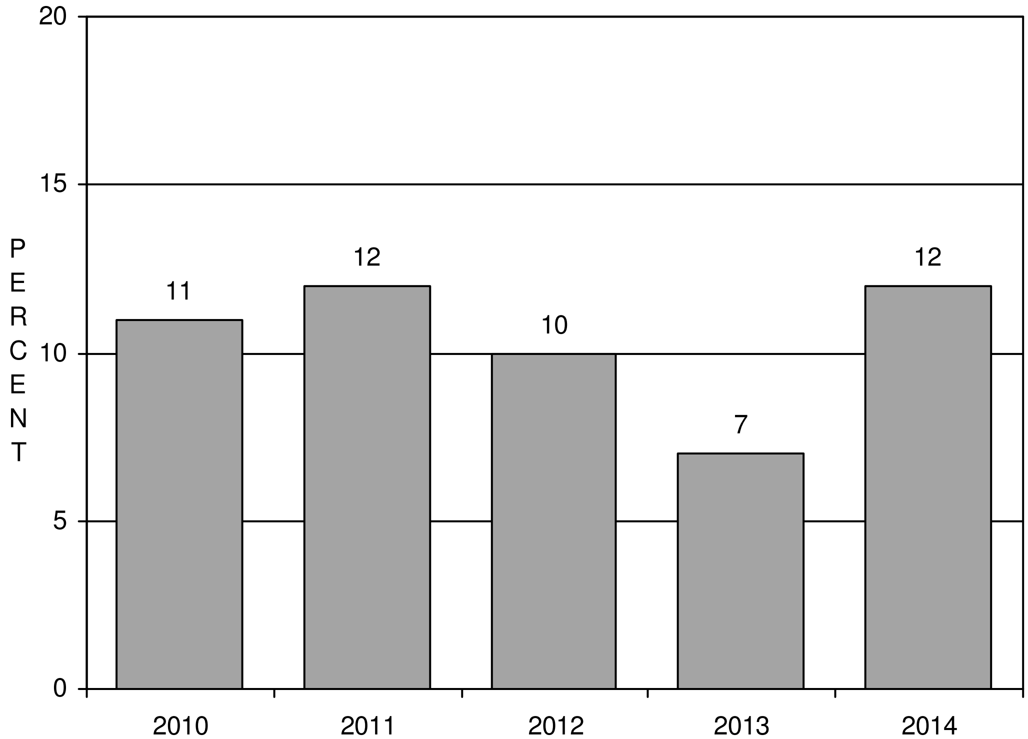
FIGURE 28
Visiting The Las Vegas Strip*
(Among Those Who Visited Or Plan To Visit Las Vegas)



Among those who visited or planned to visit Las Vegas on this trip to Laughlin, 67% said they intended to visit the Strip, down significantly from 93% in 2010, and 88% in 2011 (Figure 28).

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

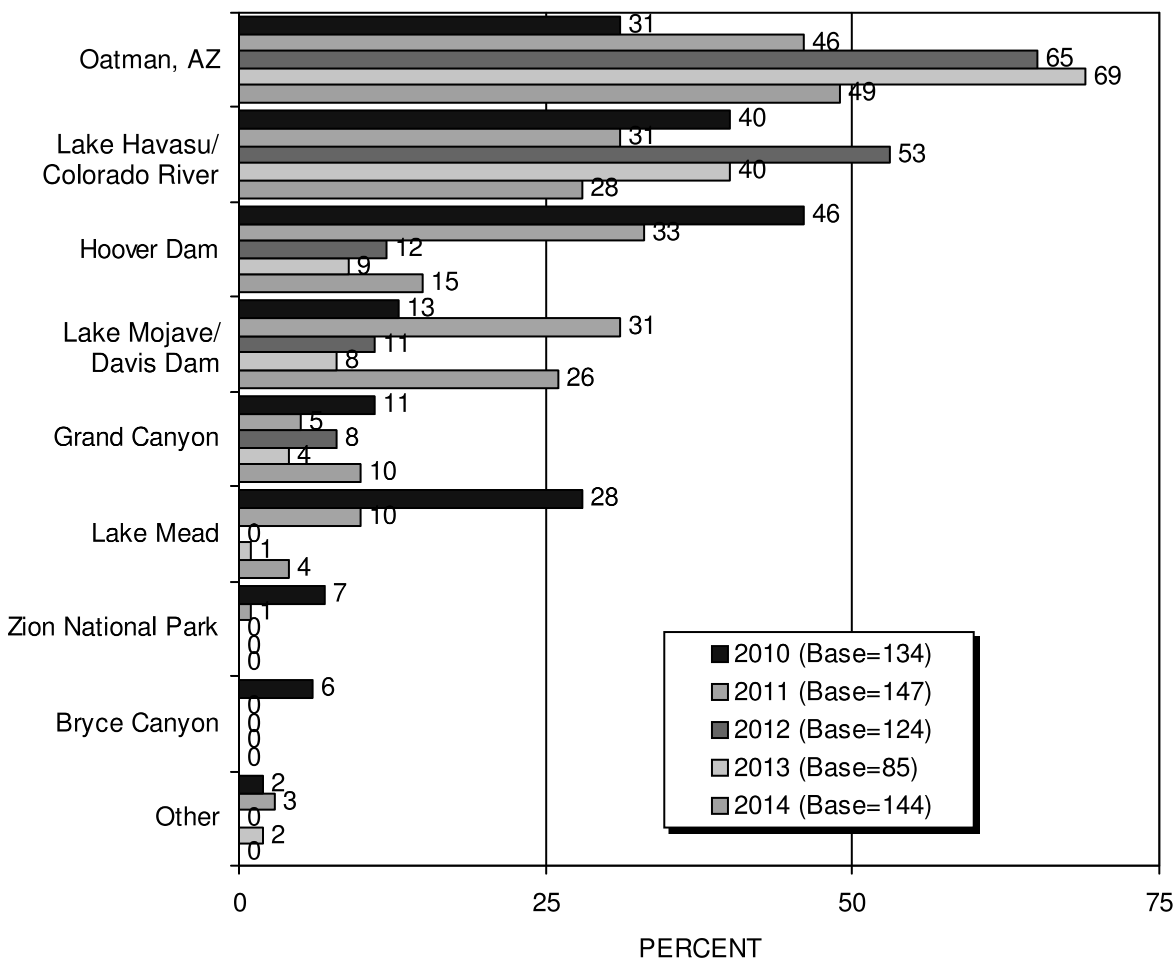
FIGURE 29
Touring Other Nearby Places*
(Among All Visitors)



We asked visitors if they had visited, or planned to visit, other nearby areas besides Las Vegas (Figure 29) and 12% said yes, up significantly from 7% last year.

* 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 (49%, up from 31% in 2010, but down from 65% in 2012, and 69% last year), followed by the Lake Havasu/Colorado River area (28%, down from 53% in 2012). Twenty-six percent (26%) visited the Lake Mojave/Davis Dam area (up from 13% in 2010, 11% in 2012 and 8% last year), while 15% visited Hoover Dam (down from 46% in 2010, and 33% in 2011), 10% went to the Grand Canyon (up from 4% last year), and 4% visited Lake Mead (down from 28% in 2010, and 10% in 2011).

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* 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-one percent (81%) reported two adults in their party, down significantly from 86% in 2010 and 85% in 2011. Eleven percent (11%) said they were traveling alone, the same as last year's figure. Nine percent (9%) said they were traveling in a party of three or more people, up from 3% in 2010. The average party size in 2014 was 2.0 persons, up significantly from 1.9 in 2010.

FIGURE 31
Adults In Immediate Party

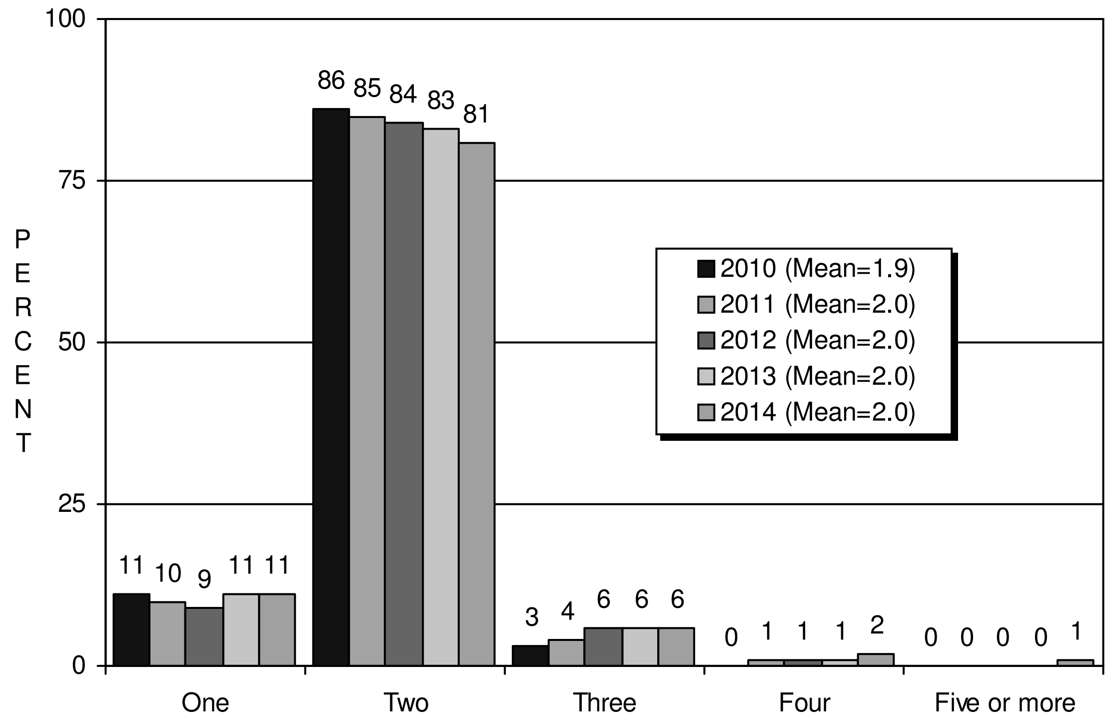
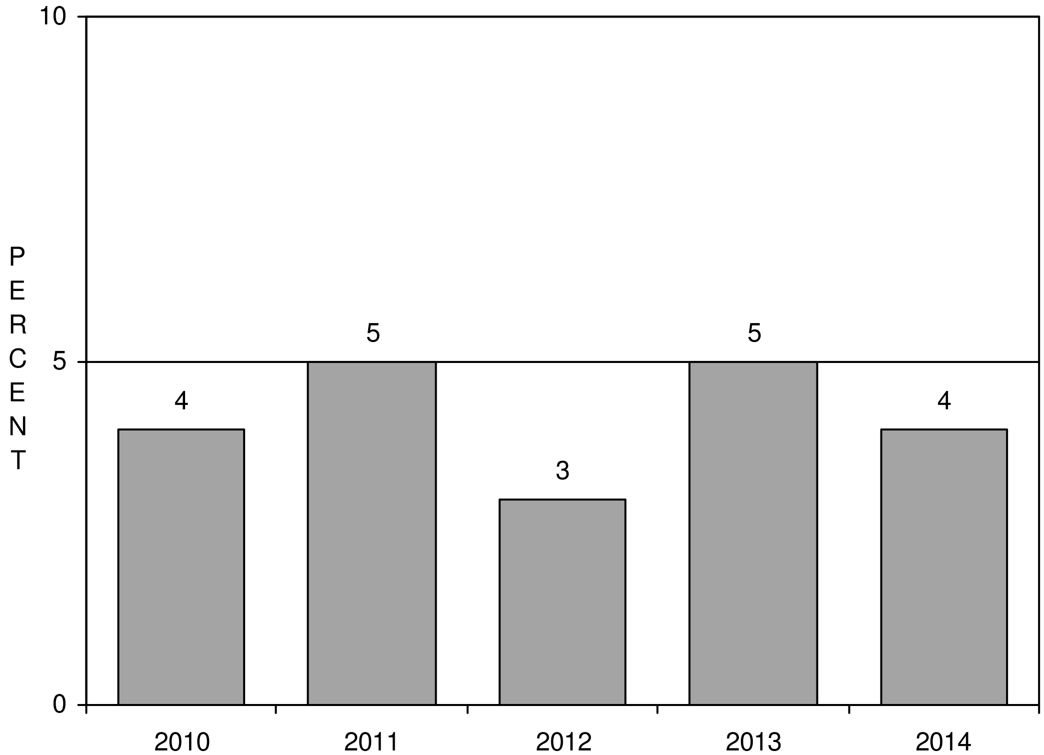


FIGURE 32
Whether Had Persons In Immediate Party Under Age 21*
(Among All Visitors)



We asked visitors whether they had any people under the age of 21 traveling with them in their immediate party (Figure 32). Four percent (4%) said their party included someone under the age of 21, down from 5% each in 2011 and last year.

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

FIGURE 33
Nights Stayed

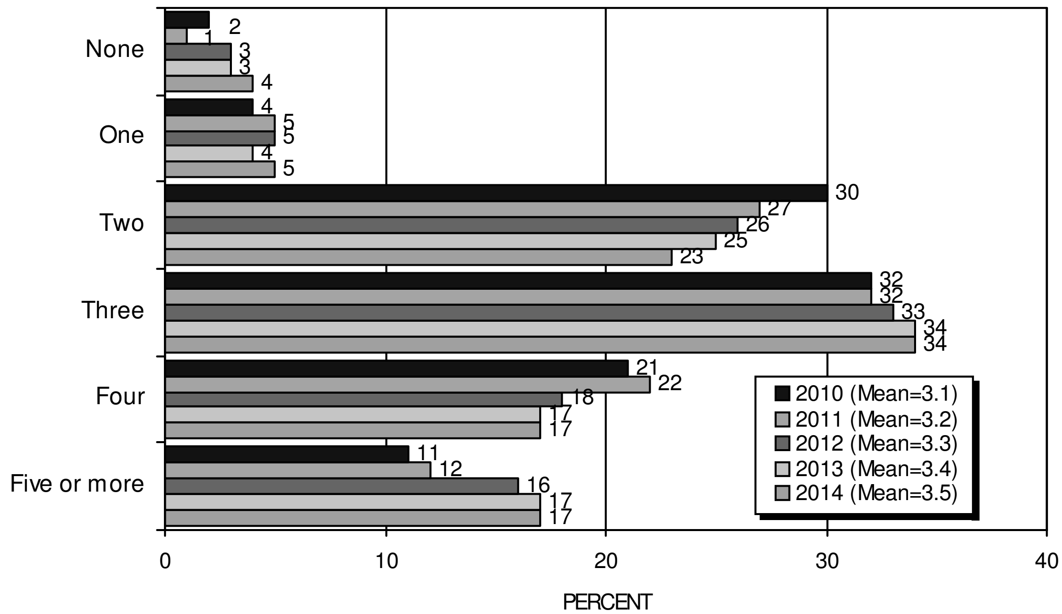
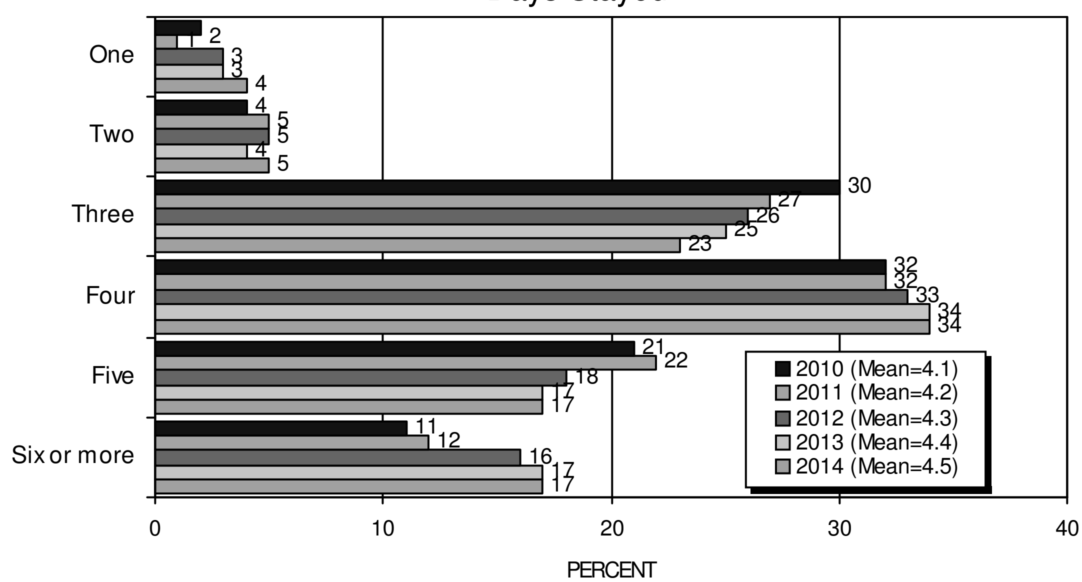
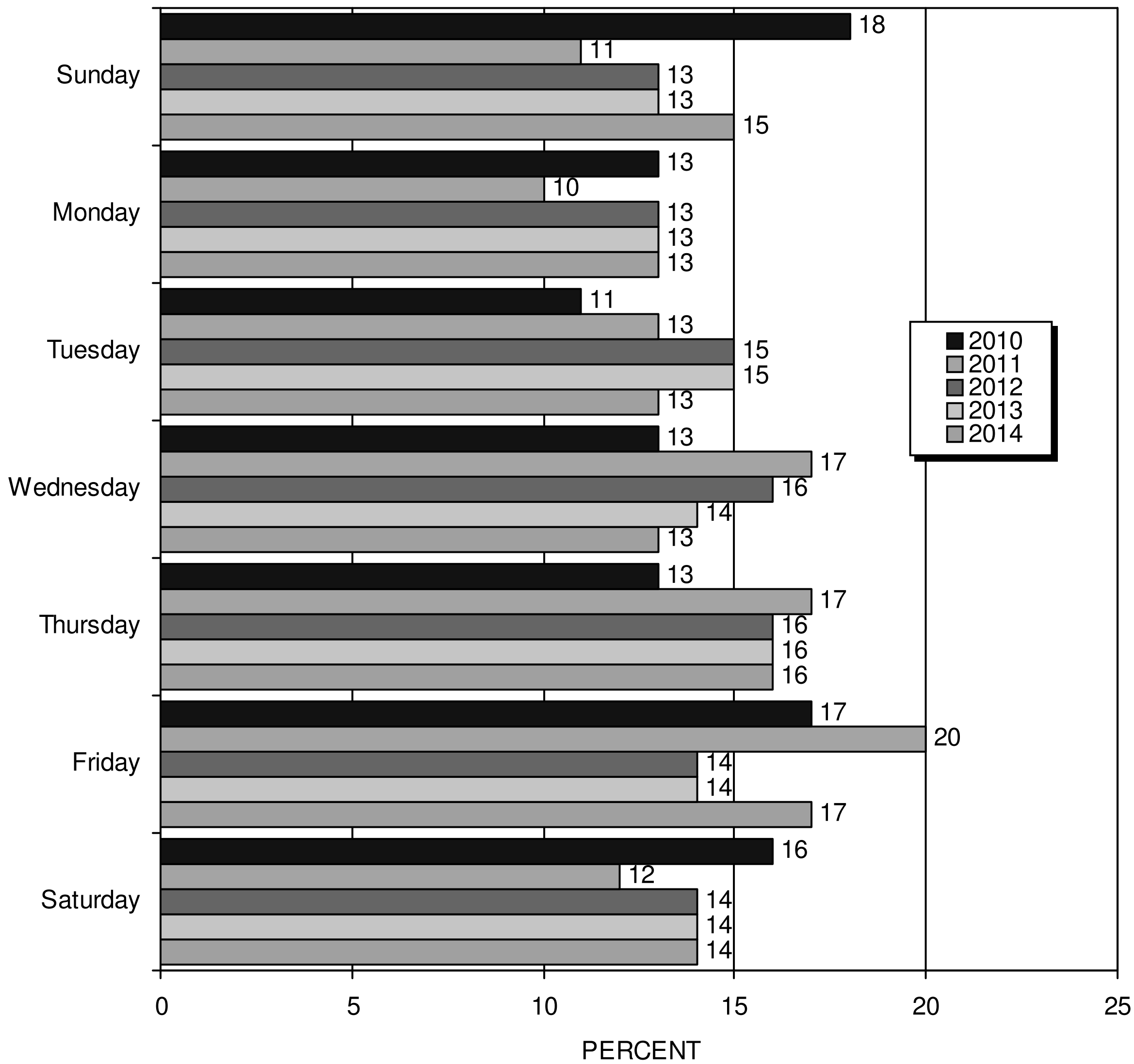


FIGURE 34
Days Stayed



During 2014, Laughlin visitors stayed an average of 3.5 nights and 4.5 days, up significantly from 3.1 nights and 4.1 days in 2010, 3.2 nights and 4.2 days in 2011 and 3.3 nights and 4.3 days in 2012 (Figures 33 and 34).

FIGURE 35
Day Of Arrival

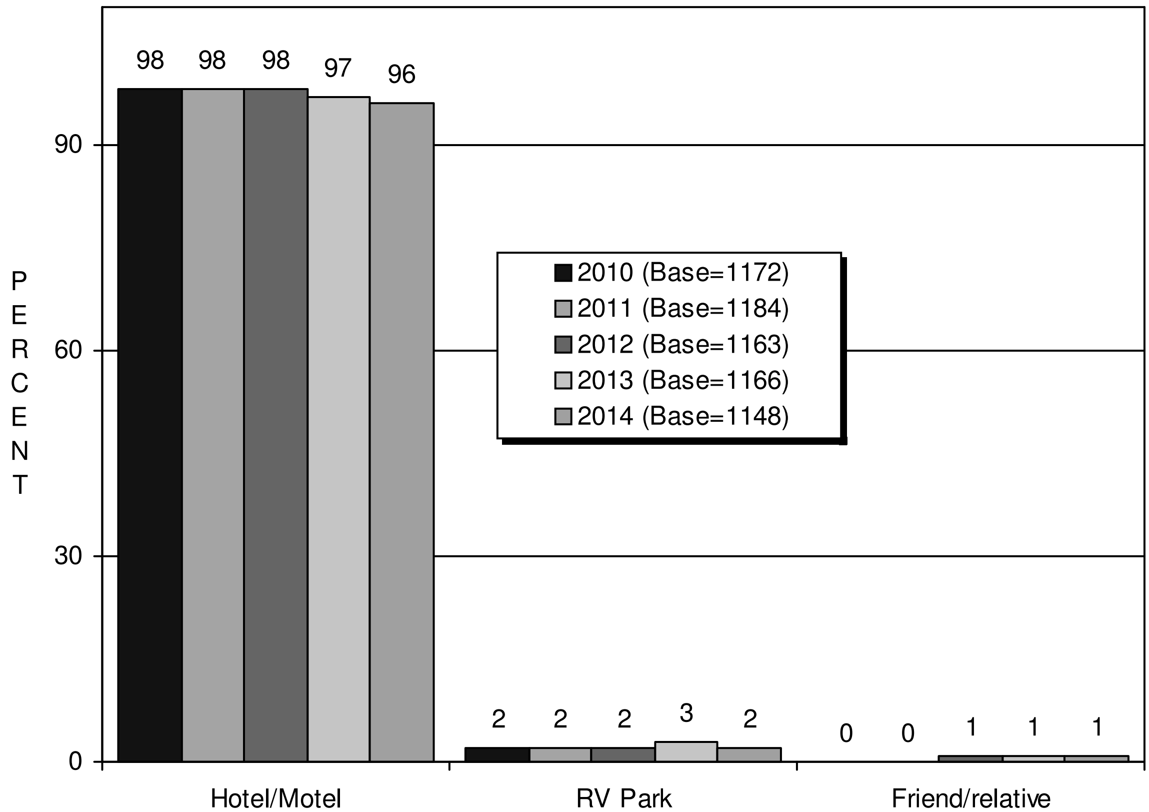


In 2014, visitors were most likely to arrive in Laughlin on a Friday (17%, down from 20% in 2011, but up from 14% each in 2012 and 2013), followed by a Thursday (16%, up significantly from 13% in 2010). Fifteen percent (15%) arrived on a Sunday, down significantly from 18% in 2010, but up from 11% in 2011.

FIGURE 36
Weekend Versus Weekday Arrival

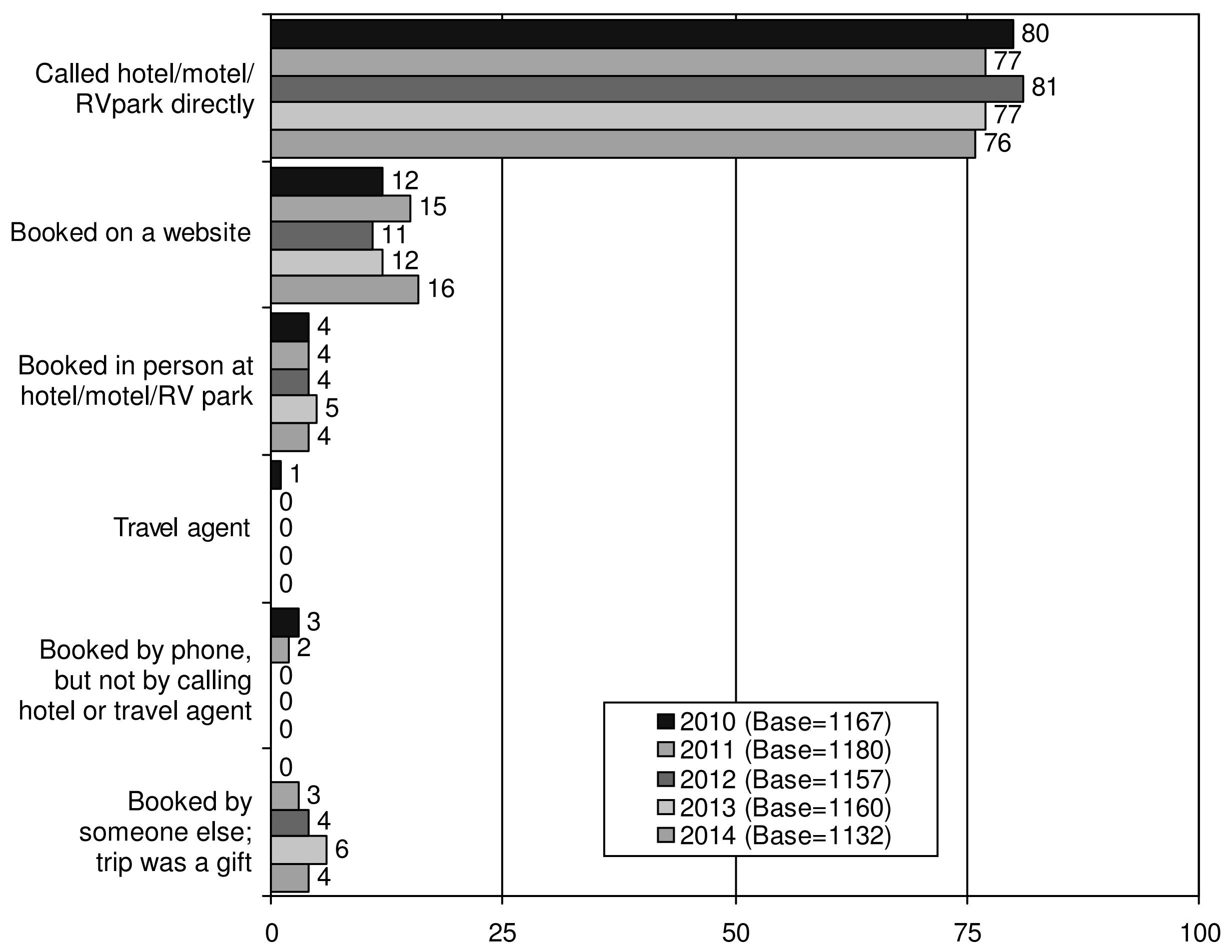
Thirty percent (30%) of visitors arrived in Laughlin on the weekend (Friday or Saturday), while 70% of visitors arrived on a weekday (Sunday through Thursday), not significantly different from past years (Figure 36).

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



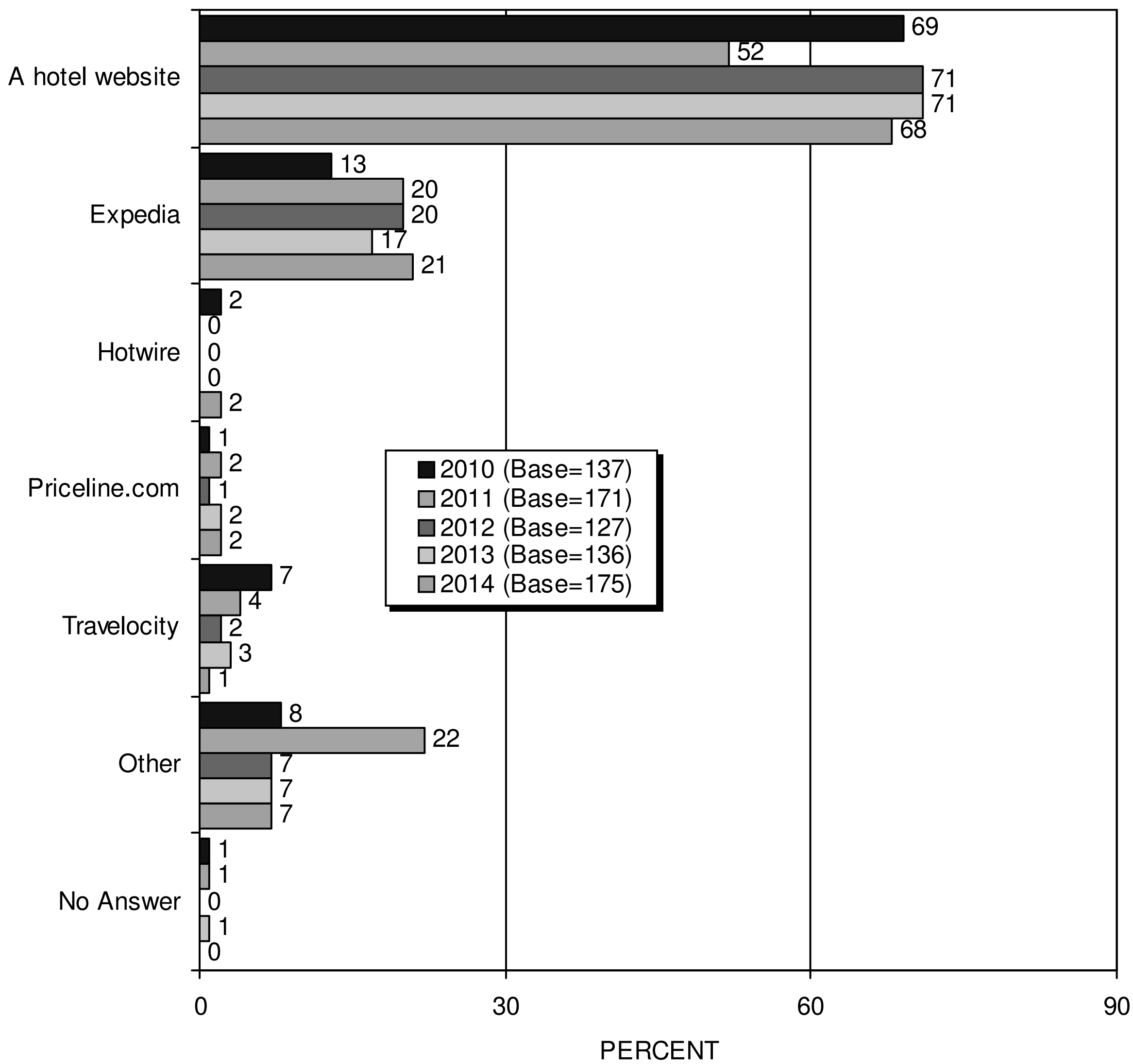
As shown in Figure 37, among visitors who stayed overnight, 96% stayed in a hotel, down from 98% each from 2010 – 2012.

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



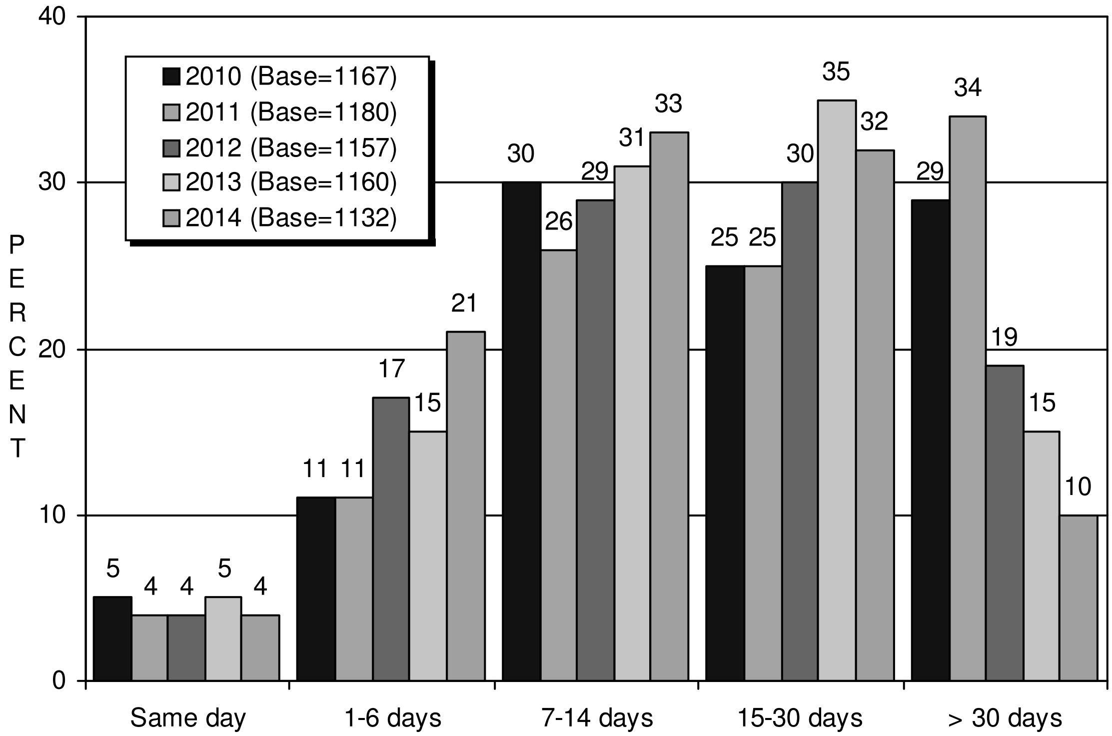
Visitors were asked how they booked their accommodations (Figure 38). In 2014, 76% said they booked their accommodations by calling the property directly (down significantly from 80% in 2010 and 81% in 2012), while 16% booked on a website (up from 12% each in 2010 and 2013 and 11% in 2012), 4% booked in person, and another 4% said someone else booked the trip or the trip was a gift.

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



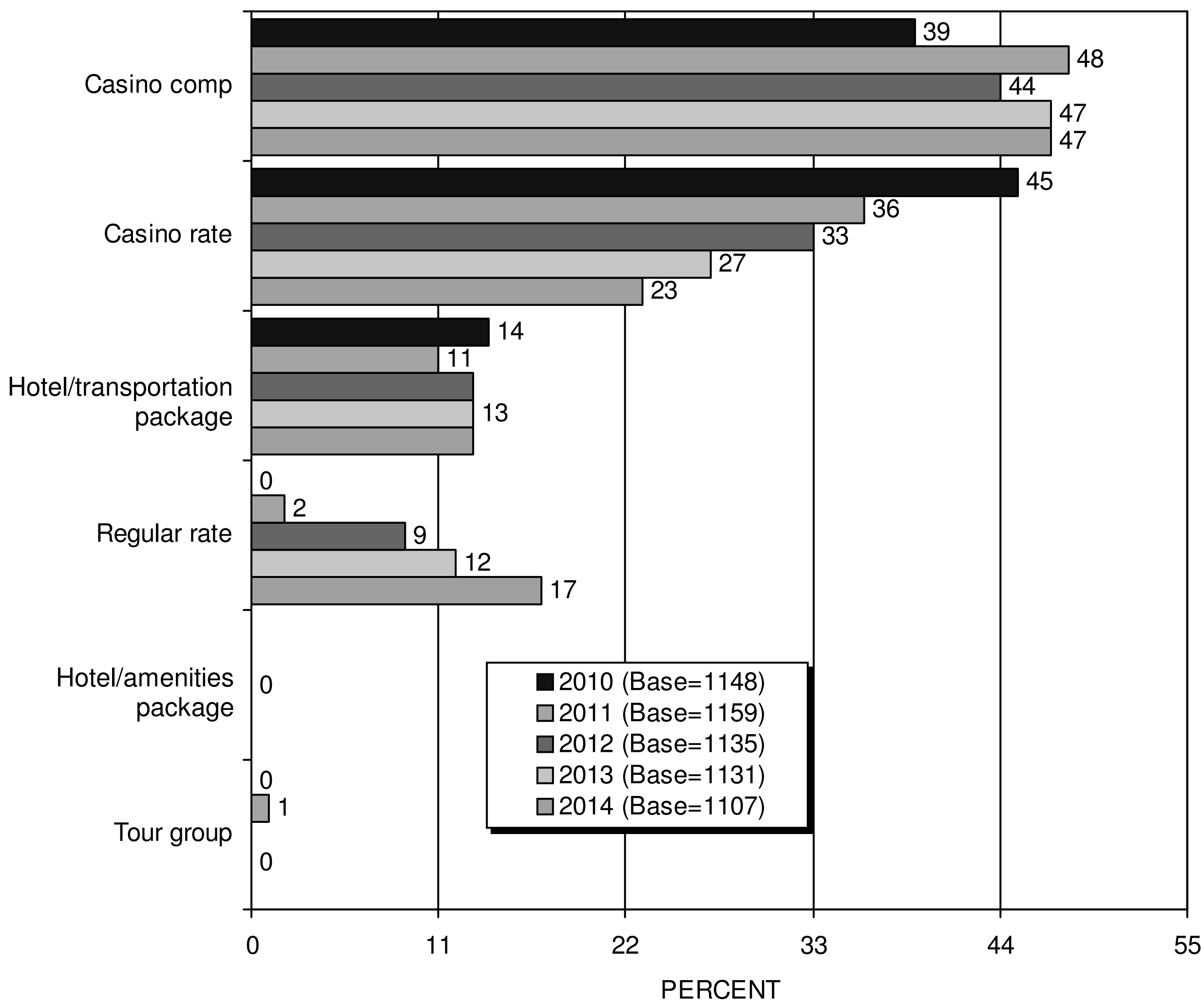
Visitors who booked their accommodations on a website were asked which one they used (Figure 39). Sixty-eight percent (68%) said they used a hotel website to book their accommodations, up significantly from 52% in 2011. Twenty-one percent (21%) used Expedia, and 2% each used Hotwire and Priceline. One percent (1%) used Travelocity, down from 7% in 2010.

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). Four percent (4%) of visitors booked accommodations the same day they arrived in Laughlin, 21% booked one to six days in advance (up from 2010 – 2013), 65% booked seven to 30 days in advance (up from 55% in 2010, 51% in 2011 and 59% in 2012), and 10% booked more than 30 days in advance (down from 2010 – 2013).

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). Seven in ten (70%) reported receiving some type of casino rate – either a regular casino rate (23%, down from 45% in 2010, 36% in 2011, 33% in 2012, and 27% last year) or a casino complimentary rate (47%, up from 39% in 2010). Thirteen percent (13%) received a hotel-transportation package. Seventeen percent (17%) said they received a regular room rate, up from 2010 – 2013 readings.

FIGURE 42
Room Rate By Booking Method
(2014)

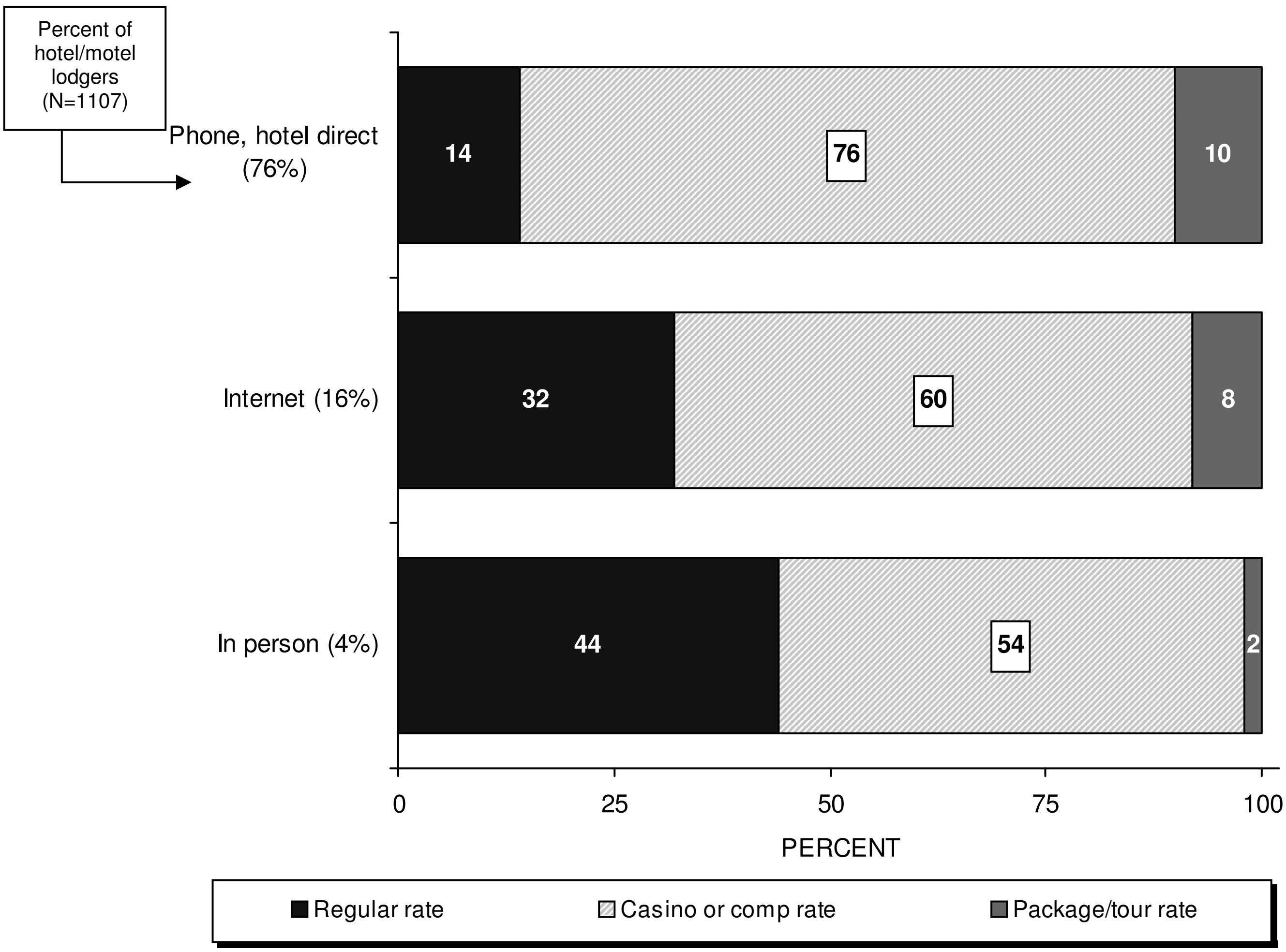
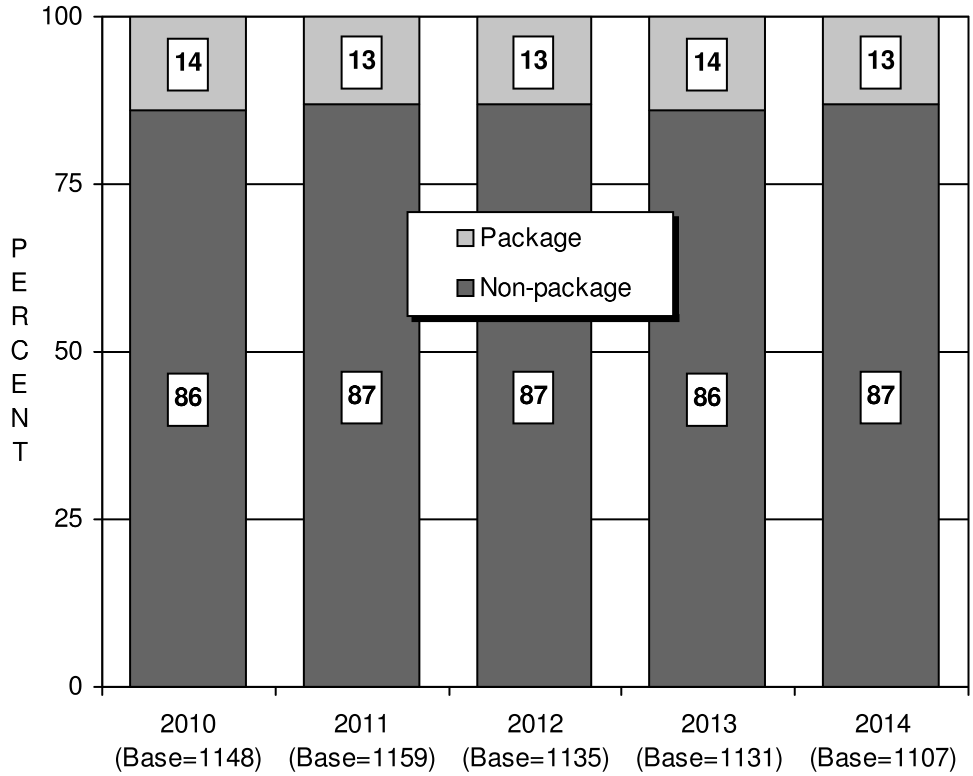


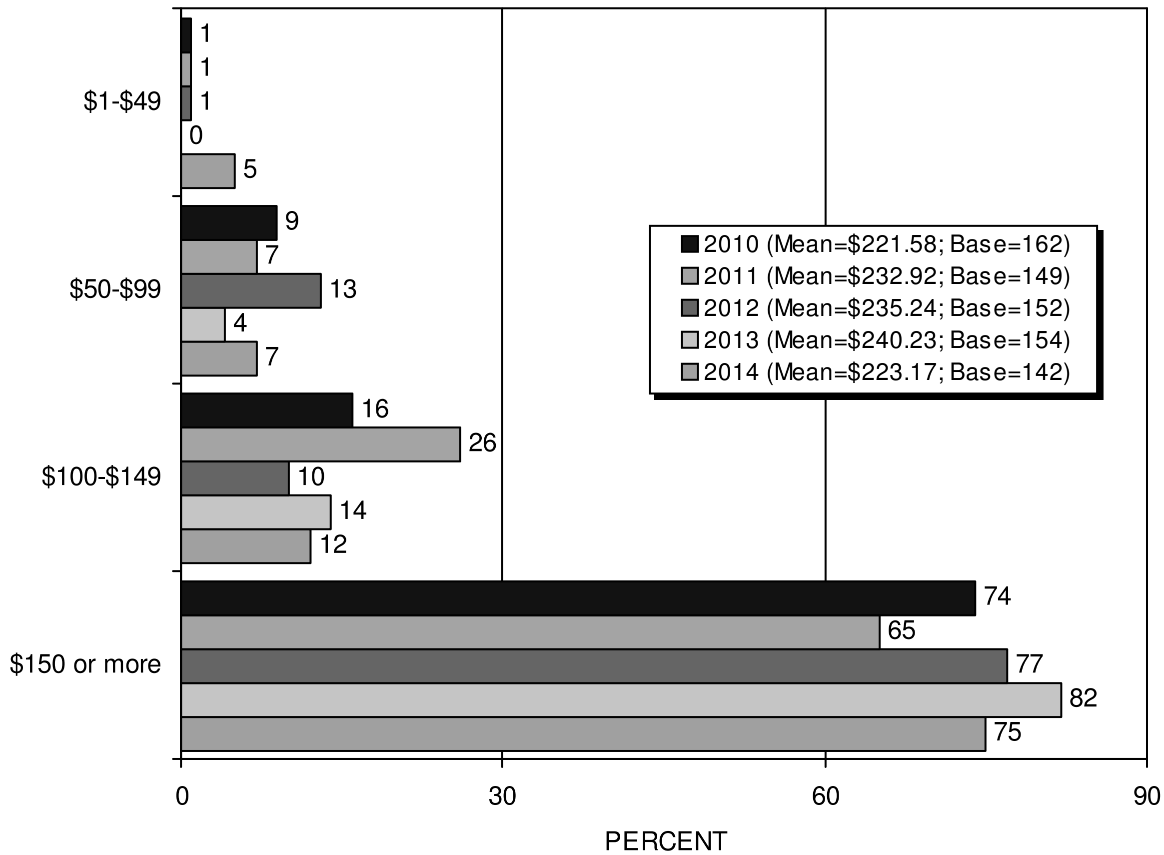
Figure 42 shows the room rate category by the booking method for 2014 among those staying in a hotel or motel. Of those who called the hotel directly, three-quarters (76%) received a casino or casino complimentary rate, while 10% received a package or tour rate, and 14% a regular room rate. Of those who booked on the Internet, six in ten (60%) received a casino or casino complimentary rate, while 32% received a regular rate and 8% a package or tour rate. Of those who booked in person, over one-half (54%) received a casino or casino complimentary rate, while four in ten (44%) received a regular room rate and 2% received a package or tour rate.

FIGURE 43
Package Vs. Non-Package Rates
(Among Those Staying In A Hotel Or Motel)



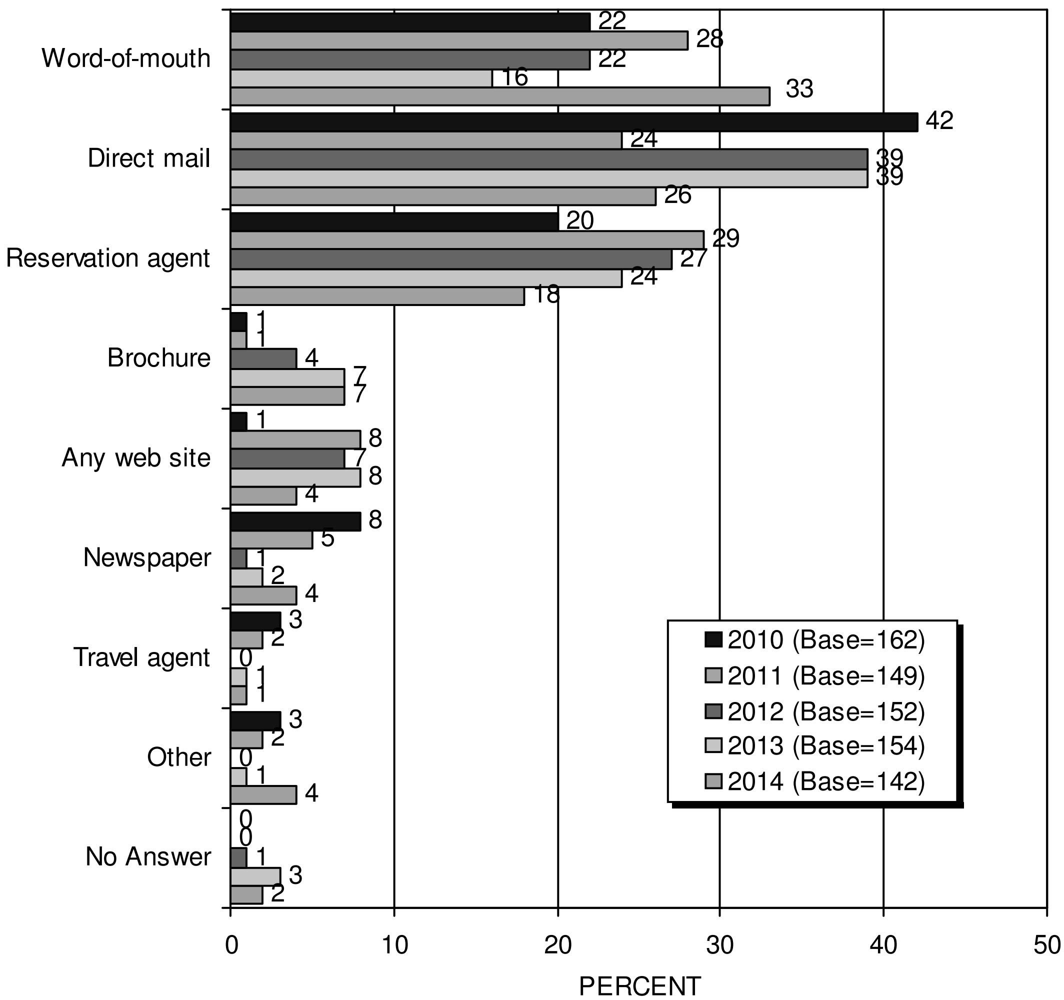
In 2014, 13% received their lodging as part of a package deal (13% a hotel/transportation package, and less than 1% a tour group package), not significantly different from past years (Figure 43).

FIGURE 44
Cost Of Package — Per Person
(Among Those Who Bought A Package)



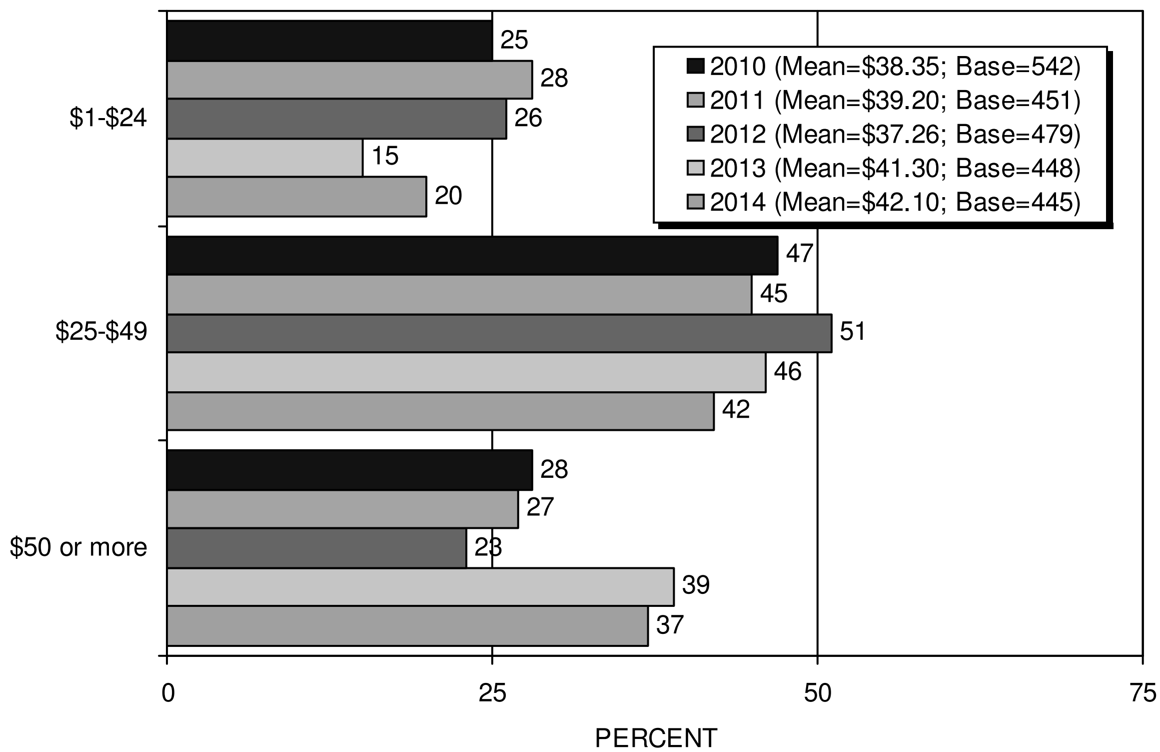
We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 44). Three-quarters (75%) said they paid $150 or more for their package. Twelve percent (12%) paid $100 to $149 (down from 26% in 2011), and 12% paid less than $100 (up significantly from 4% last year). The average package cost was $223.17, not significantly different from the 2010 to 2013 averages.

FIGURE 45
How First Learned About Package
(Among Those Who Bought A Package)



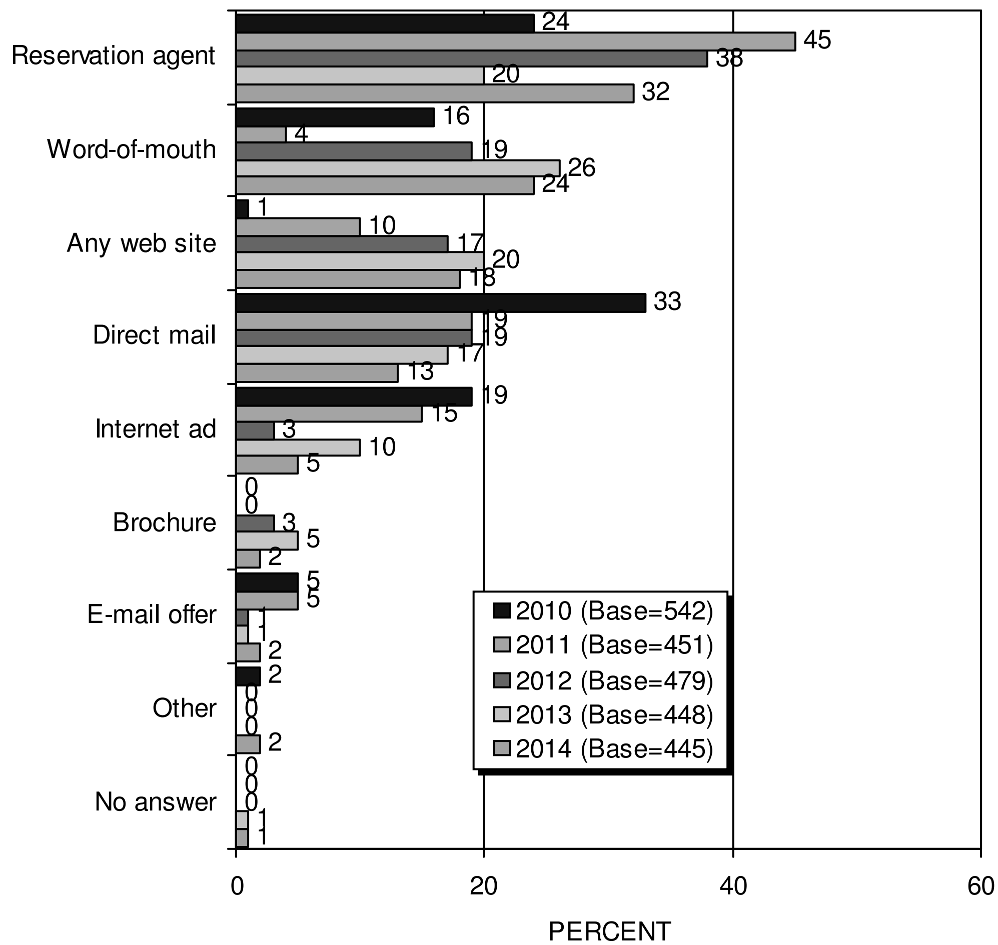
Package purchasers were asked how they first found out about the package they bought for their trip to Laughlin (Figure 45). One-third (33%) said they first heard about the offer through word-of-mouth (up from 22% each in 2010 and 2012 and 16% last year), 26% said they received an offer through the mail (down significantly from 42% in 2010 and 39% each in 2012 and 2013), and 18% heard about the package through a reservation agent or call center (down from 29% in 2011). Seven percent (7%) said they found out through a brochure (up from 1% each in 2010 and 2011), and 4% each said they first found out about their package through a web site (up from 1% in 2010), or a newspaper (up from 1% in 2012).

FIGURE 46
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package)



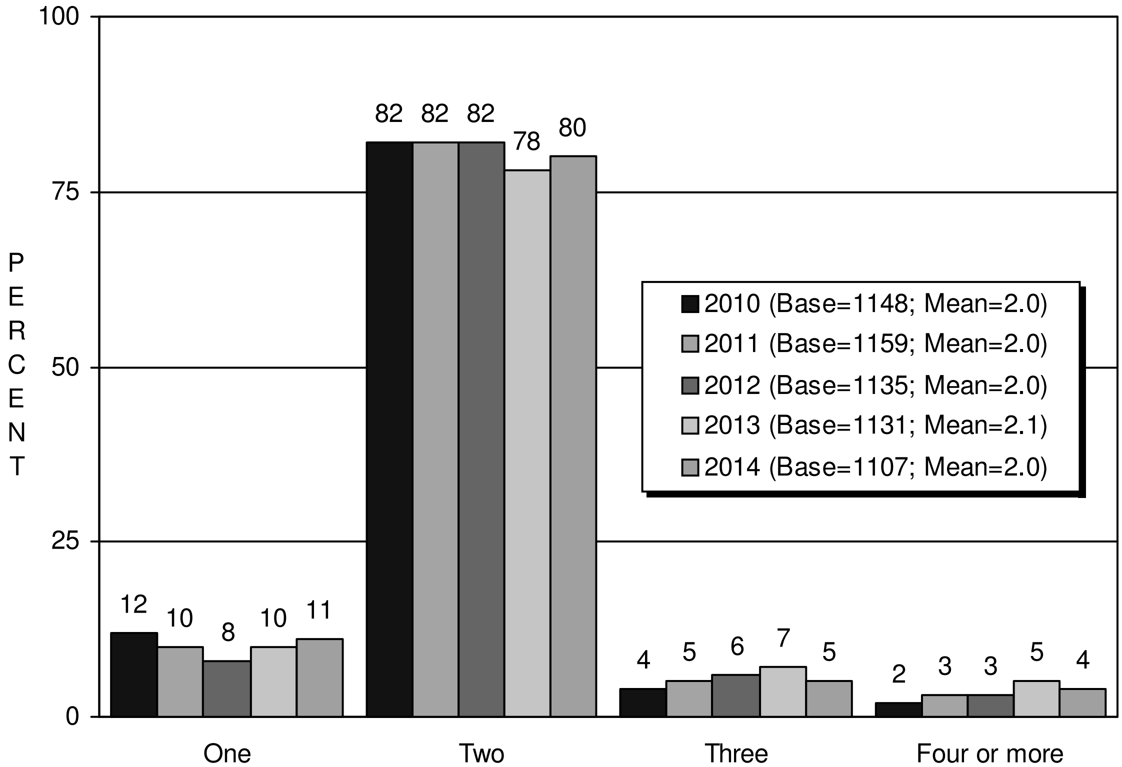
The average reported room cost among non-package hotel and motel lodgers in 2014 was $42.10, significantly higher than the averages of $38.35 in 2010, $39.20 in 2011, and $37.26 in 2012 (Figure 46). Thirty-seven percent (37%) reported spending $50 or more on their lodgings, up significantly from 28% in 2010, 27% in 2011, and 23% in 2012. Forty-two percent (42%) spent between $25 and $49, down from 51% in 2012. The remaining 20% reported spending less than $50, down from 25% in 2010, 28% in 2011, and 26% in 2012.

FIGURE 47
How First Learned About Room Rate
(Among Those Staying In A Hotel Or Motel/Non-Package)



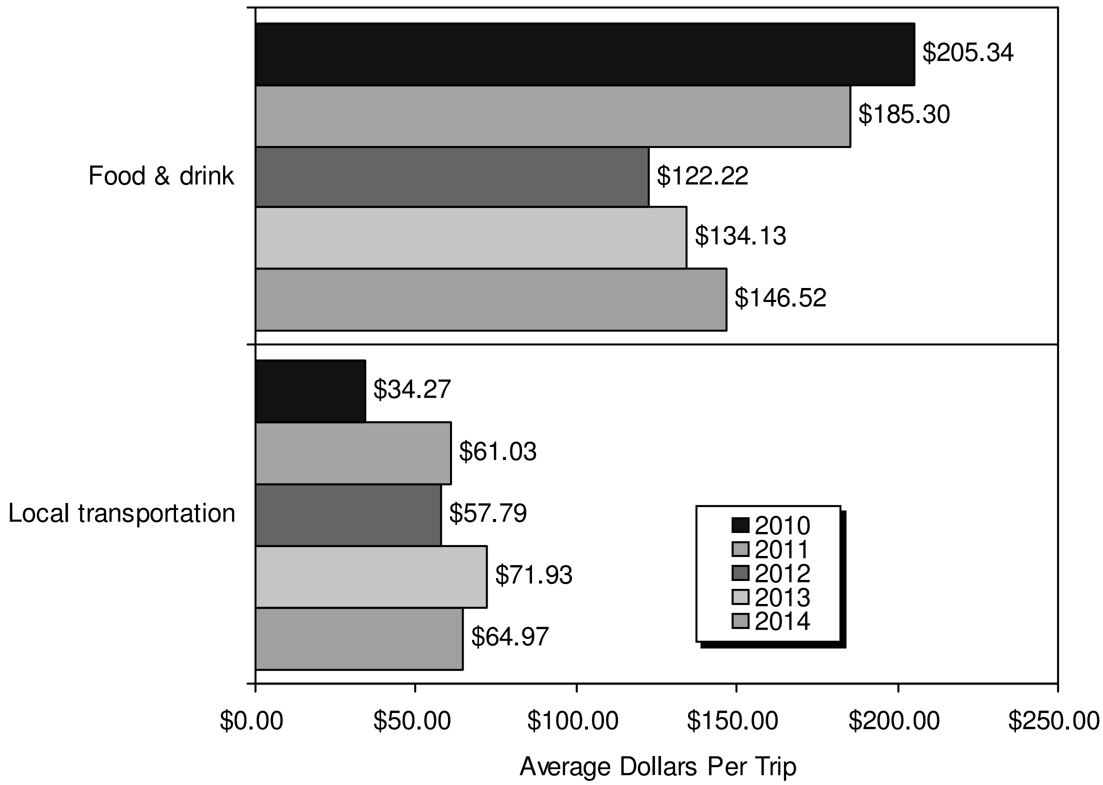
Non-package hotel and motel lodgers were asked how they first found out about the room rate they paid (Figure 47). Thirty-two percent (32%) said they first heard about their room rate from a reservation agent or through a call center, up from 24% in 2010 and 20% last year, but down from 45% in 2011. Twenty-four percent (24%) said they heard of their room rate through word of mouth, a significant increase from 16% in 2010, 4% in 2011, and 19% in 2012. Eighteen percent (18%) said they learned about it on a website (up from 1% in 2010, and 10% in 2011), while 13% received an offer in the mail (down from 33% in 2010 and 19% each in 2011 and 2012). Five percent (5%) said they saw an online ad for the room rate (up from 3% in 2012 but down from 19% in 2010, 15% in 2011 and 10% last year), while 2% discovered it in a brochure (up from less than 1% each in 2010 – 2011), and another 2% learned about it through an e-mail offer (down from 5% each in 2010 and 2011).

FIGURE 48
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



As Figure 48 shows, the majority of visitors (80%) said that two people stayed in their room (down significantly from 82% each from 2010 – 2012). Nine percent (9%) said that three or more people stayed in their room (down significantly from 12% last year). The average number of room occupants per hotel/motel room was 2.0 occupants.

FIGURE 49
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 49 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In 2014, the average food and drink expenditures were $146.52 per trip, up significantly from $122.22 in 2012 and $134.13 last year, but down significantly from $205.34 in 2010 and $185.30 in 2011. The average local transportation expenditures were $64.97 per trip, down from $71.93 last year, but up from $34.27 in 2010 and $57.79 in 2012.

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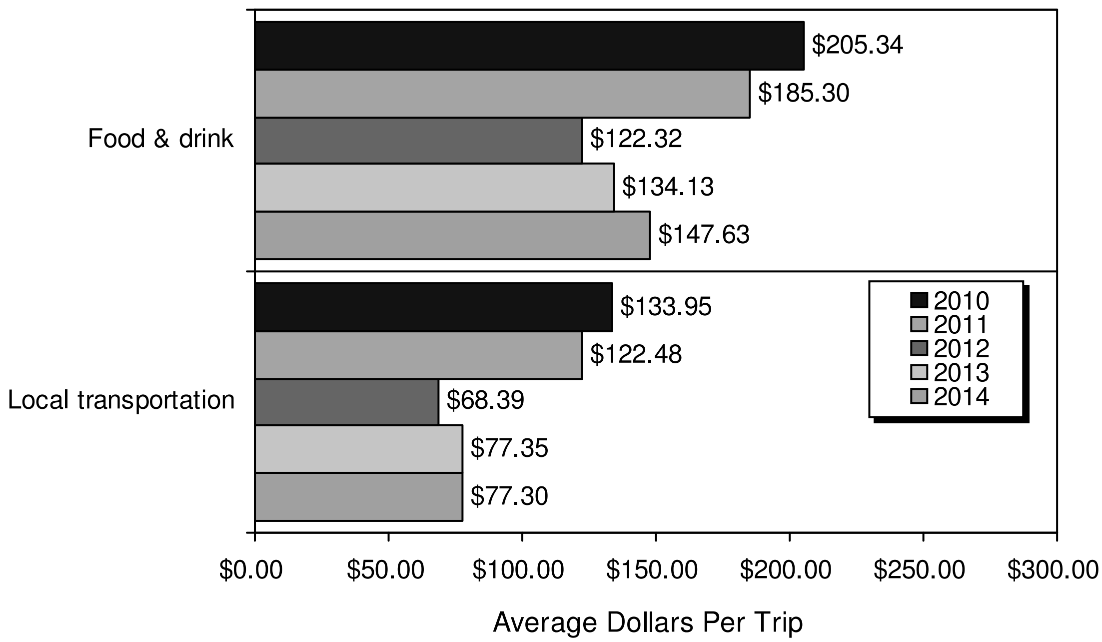
* Trip expenditures are calculated by multiplying visitors' estimated daily expenditures by the number of days they stayed in Laughlin on their most recent trip.

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

FIGURE 50
Average Trip Expenditures On Food & Drink — And Local Transportation*
(Among Those Who Spent Money In That Category)



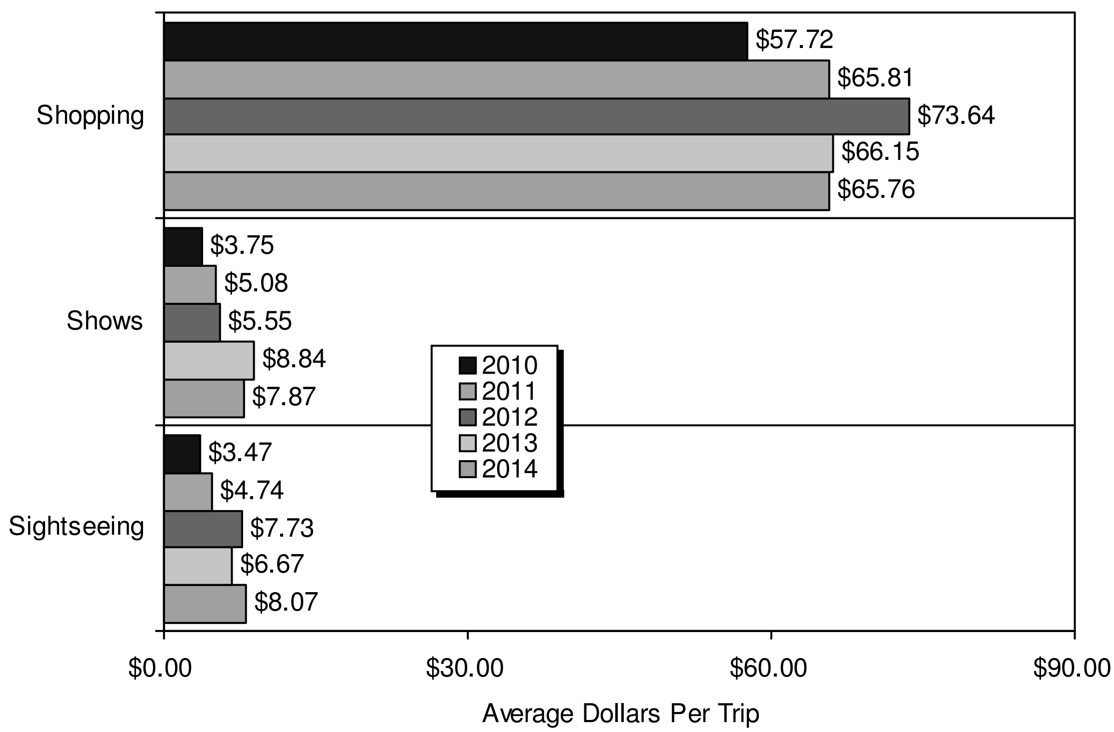
Among visitors who indicated they spent money in these categories, average food and drink expenditures in 2014 were $147.63 per trip, up significantly from $122.32 in 2012 and $134.13 last year, but down from 2010 – 2011 readings (Figure 50). Average local transportation expenditures were $77.30 per trip, up significantly from $68.39 in 2012, but down significantly from 2010 – 2011.

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

	2010	2011	2012	2013	2014
Food and drink					
Base size	(1200)	(1200)	(1199)	(1200)	(1191)
Proportion of total	100%	100%	100%	100%	99%
Local transportation					
Base size	(307)	(598)	(1014)	(1116)	(1009)
Proportion of total	26%	50%	85%	93%	84%

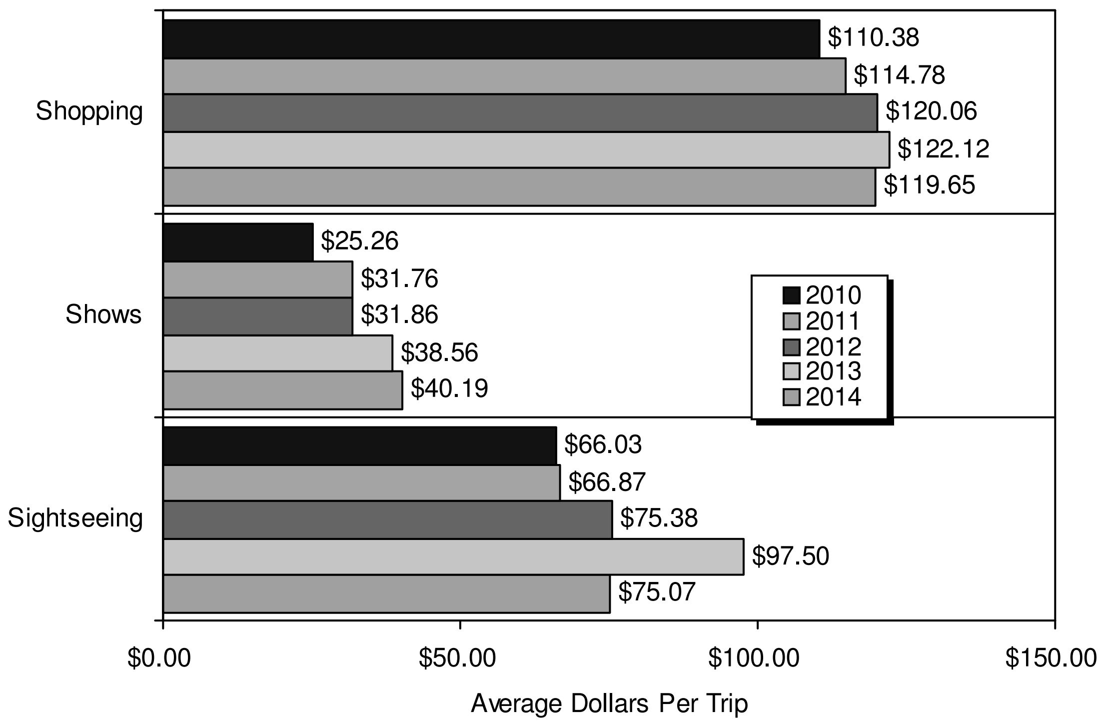
* Local transportation expenditures include spending in both Laughlin and Bullhead City.

FIGURE 51
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 51 shows these average expenditures *including visitors who said they spent nothing in each category*. The average total spent on shopping in 2014 was $65.76, up significantly from $57.72 in 2010. An average of $7.87 was spent on shows (up significantly from 2010 – 2012), and an average of $8.07 was spent on sightseeing (up from $3.47 in 2010 and $4.74 in 2011).

FIGURE 52
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 2014 was $119.65, not significantly different from past years (Figure 52). The average spent on shows was $40.19, up significantly 2010 – 2012 readings. The average spent on sightseeing was $75.07, down significantly from $97.50 last year.

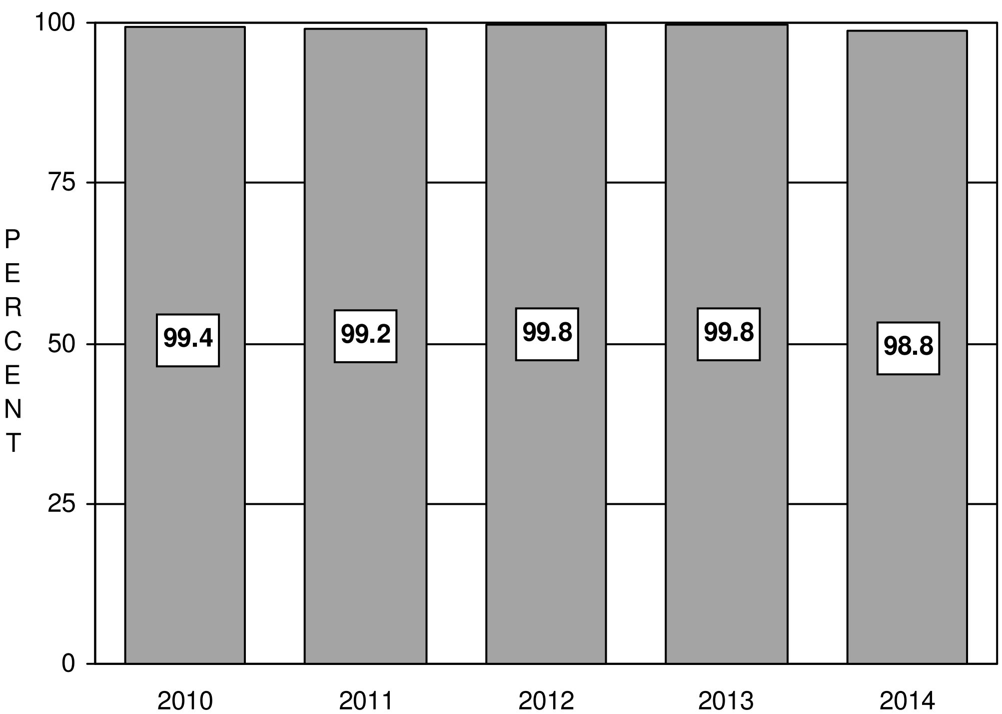
Percentages of visitors who spent money in each category are shown in the following table:

	2010	2011	2012	2013	2014
Shopping					
Base size	(628)	(688)	(736)	(650)	(660)
Proportion of total	52%	57%	61%	54%	55%
Shows					
Base size	(178)	(192)	(209)	(275)	(235)
Proportion of total	15%	16%	17%	17%	20%
Sightseeing					
Base size	(63)	(85)	(123)	(83)	(129)
Proportion of total	5%	7%	10%	10%	11%

GAMING BEHAVIOR AND BUDGETS

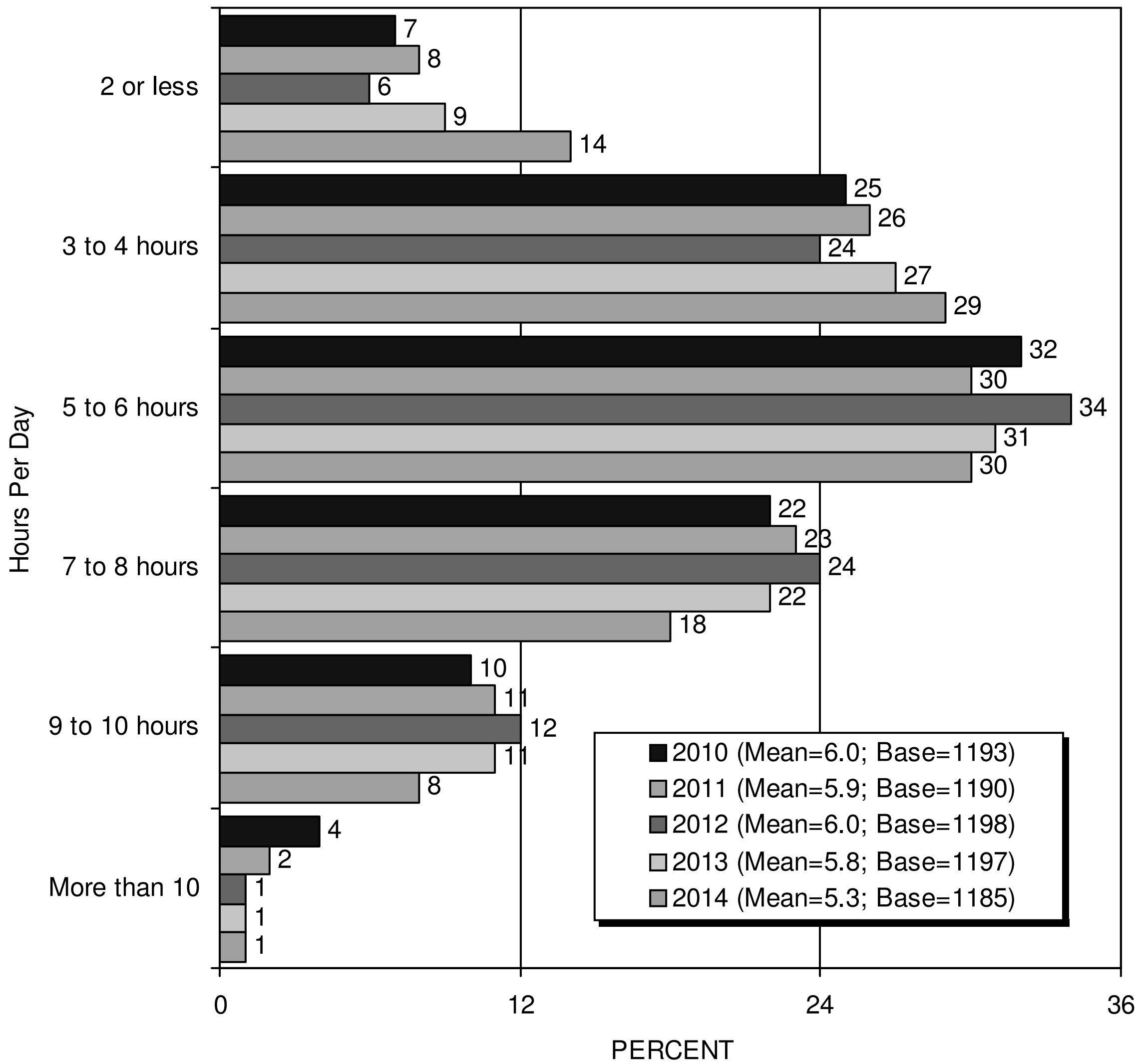
Although nearly all Laughlin visitors in the current study (98.8%) said they gambled during their visit, this was still down significantly from 99.8% in both 2012 and 2013 (Figure 53).

FIGURE 53
Whether Gambled While In Laughlin*



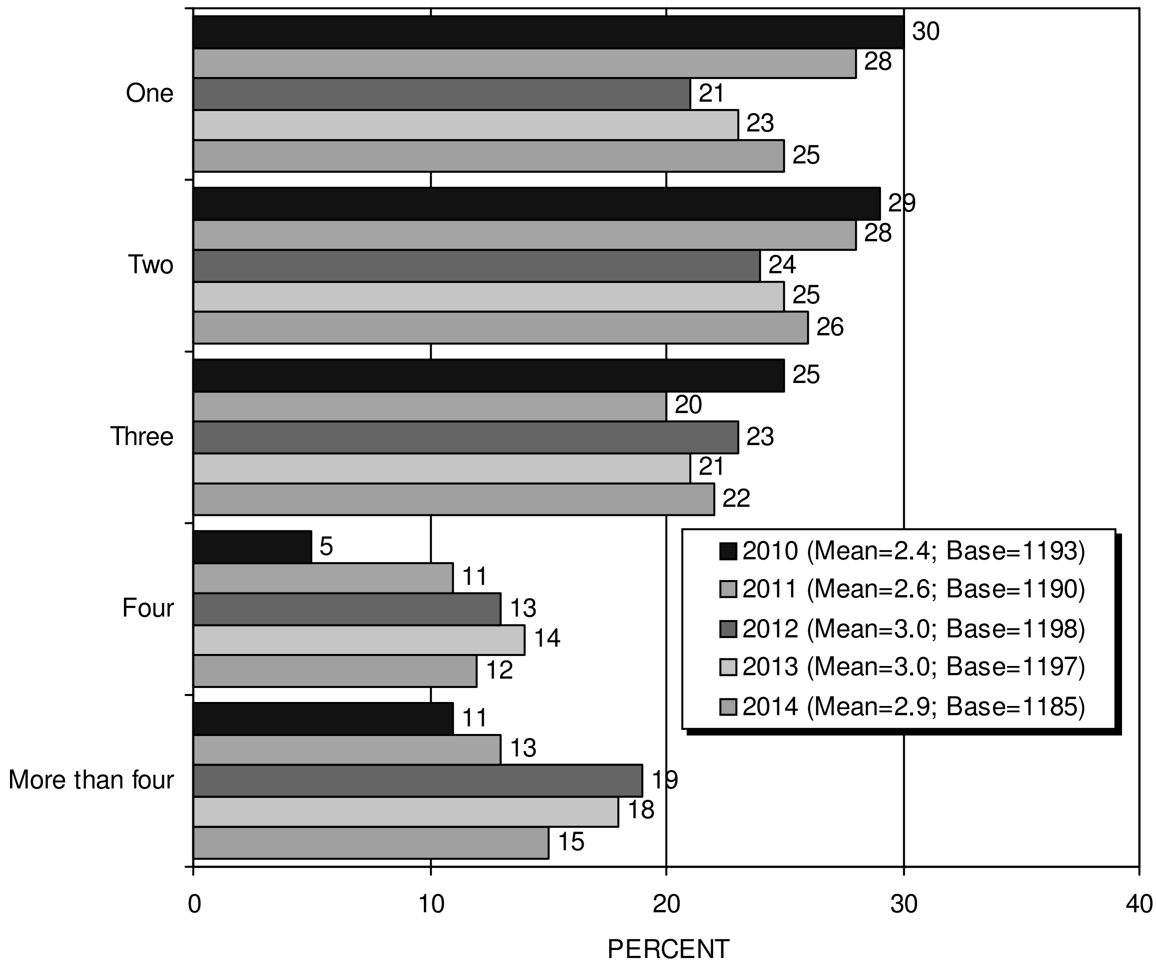
* Only "yes" responses are reported in this chart.

FIGURE 54
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



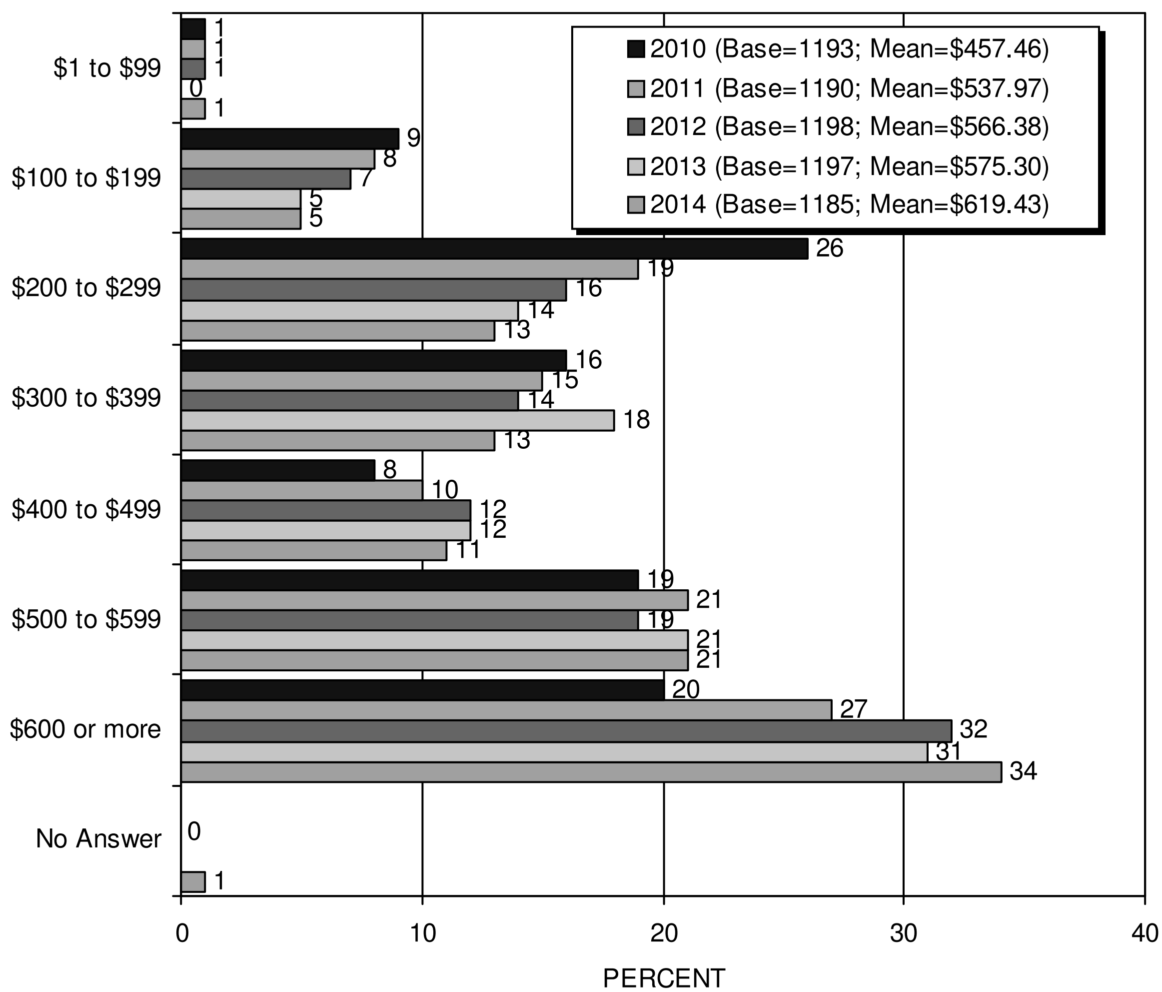
In 2014, Laughlin visitors who gambled said they spent an average of 5.3 hours doing so, down from the average of 5.9 hours in 2011, 6.0 hours each in 2010, 2012, and 5.8 hours in 2013 (Figure 54). Fourteen percent (14%) said they gambled two hours or less, up from 2010 – 2013 readings. Twenty-nine percent (29%) said they gambled from three to four hours, up from 25% in 2010 and 24% in 2012. One percent (1%) gambled more than 10 hours, down from 4% in 2010, and 2% in 2011.

FIGURE 55
Number Of Different Casinos Gambled
(Among Those Who Gambled)



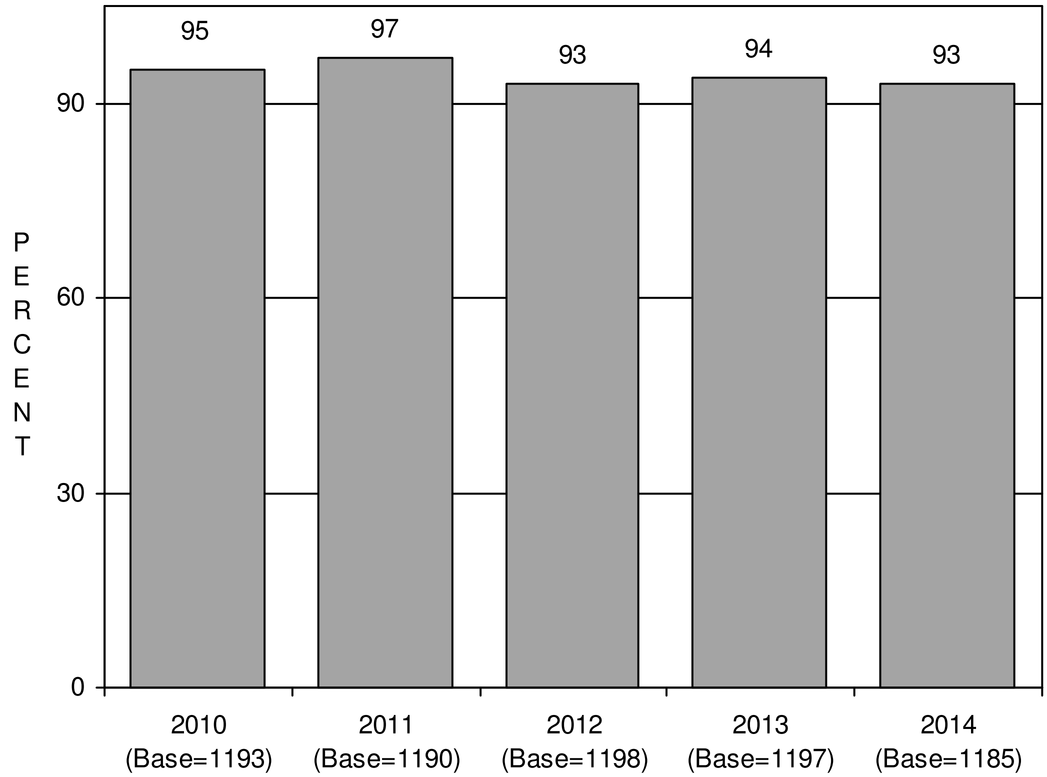
In 2014, gamblers reported gambling at an average of 2.9 casinos during their stay in Laughlin, a significant increase from 2.4 in 2010 and 2.6 in 2011 (Figure 55). Twenty-five percent (25%) reported gambling at only one casino (down significantly from 30% in 2010, and 28% in 2011, but up from 21% in 2012).

FIGURE 56
Trip Gambling Budget
(Among Those Who Gambled)



The average gambling budget reported by visitors to Laughlin in 2014 was $619.43, significantly higher than the averages from 2010 – 2013 (Figure 56). Over one-third (34%) said their gambling budget was $600 or more (up from 20% in 2010, 27% in 2011, and 31% last year). Nineteen percent (19%) allocated less than $300 for their gambling budget, down significantly from 36% in 2010, and 28% in 2011.

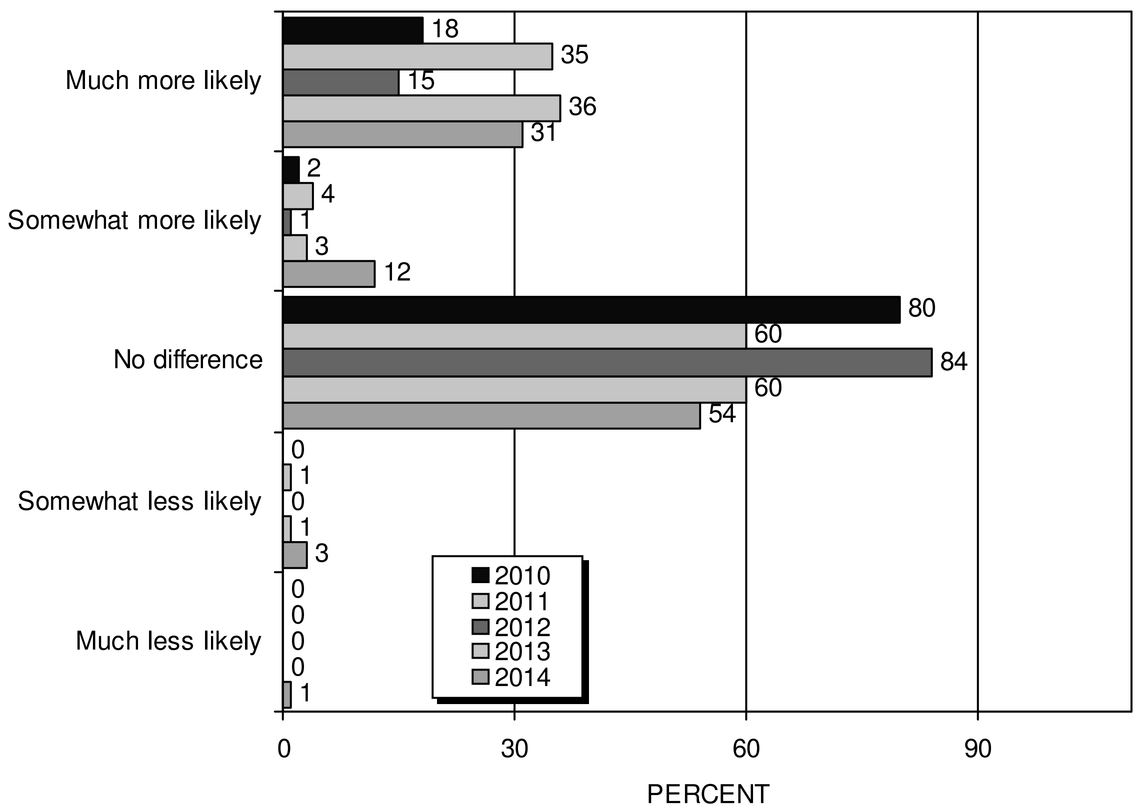
FIGURE 57
Whether Member Of A Slot/Loyalty Club*



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 2014, 93% of gamblers said they were (Figure 57), down significantly from 95% in 2010 and 97% in 2011.

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

FIGURE 58
Likelihood Of Visiting Laughlin With
More Places To Gamble Outside Laughlin

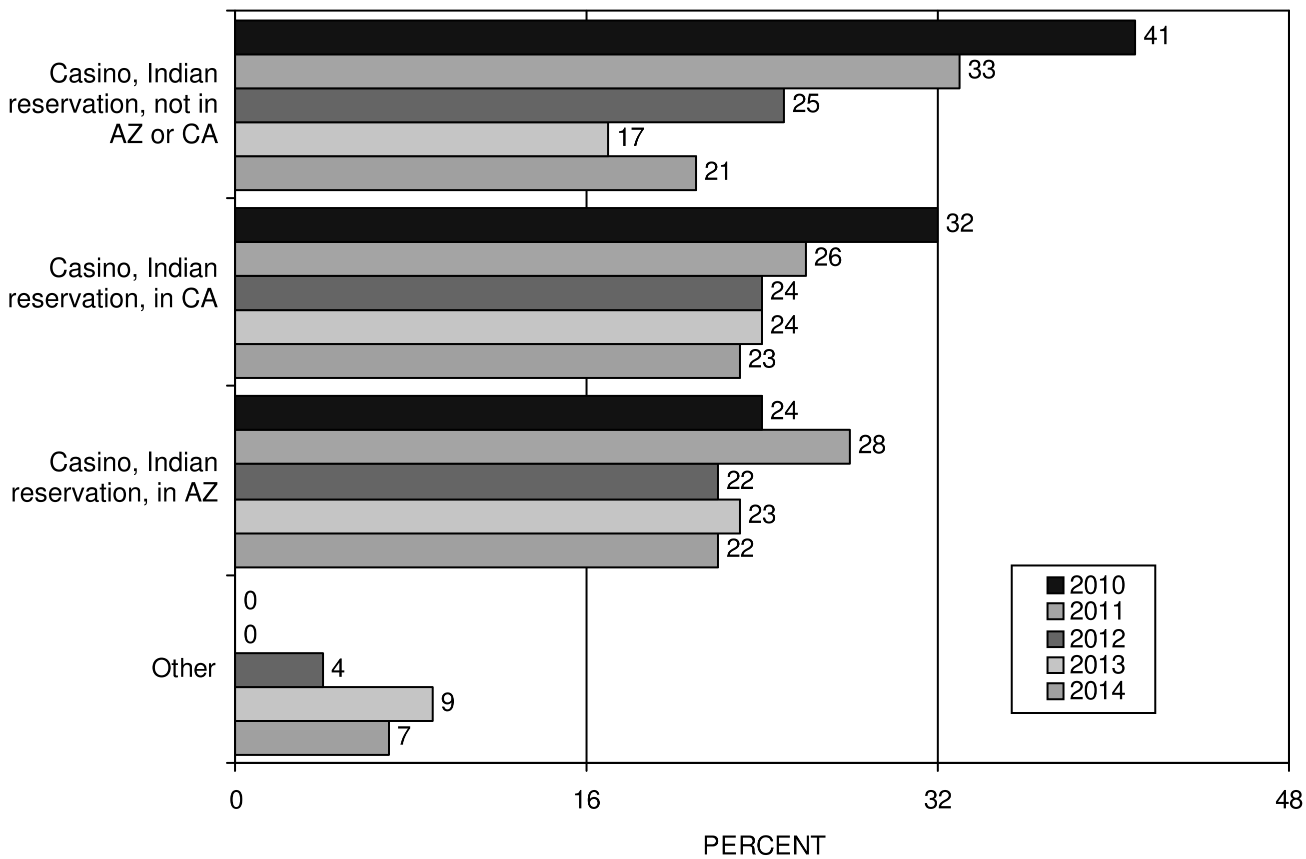


All visitors to Laughlin were asked the following:

> "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 2014, 54% said having more places to gamble would make no difference in their decision to visit Laughlin, down from 2010 – 2013 results. Thirty-one percent (31%) said that having other places to gamble made them *much more* likely to visit Laughlin (up significantly from 18% in 2010, and 15% in 2012, but down from 35% in 2011 and 36% last year), while 12% said it would make them *somewhat more* likely to visit (up from 2010 – 2013). Only 4% indicated they were less likely to visit Laughlin because of the availability of other places to gamble, although this was up significantly from 2010 – 2013 results (Figure 58).

FIGURE 59
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 59). Twenty-three percent (23%) reported gambling at an Indian reservation in California, down significantly from 32% in 2010. Twenty-two percent (22%) said they gambled at an Indian reservation in Arizona, down from 28% in 2011. Twenty-one percent (21%) said they gambled at an Indian reservation outside of Arizona or California, down from 2010 – 2012 results, but up from 17% last year.

* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

Ninety-two percent (92%) of Laughlin visitors said they were "very satisfied" with their visit to Laughlin in the 2014 survey (Figure 60), down significantly from 96% in 2011, 95% in 2012, and 94% last year. Eight percent (8%) said they were "somewhat satisfied" with their visit.

FIGURE 60
Satisfaction With Visit

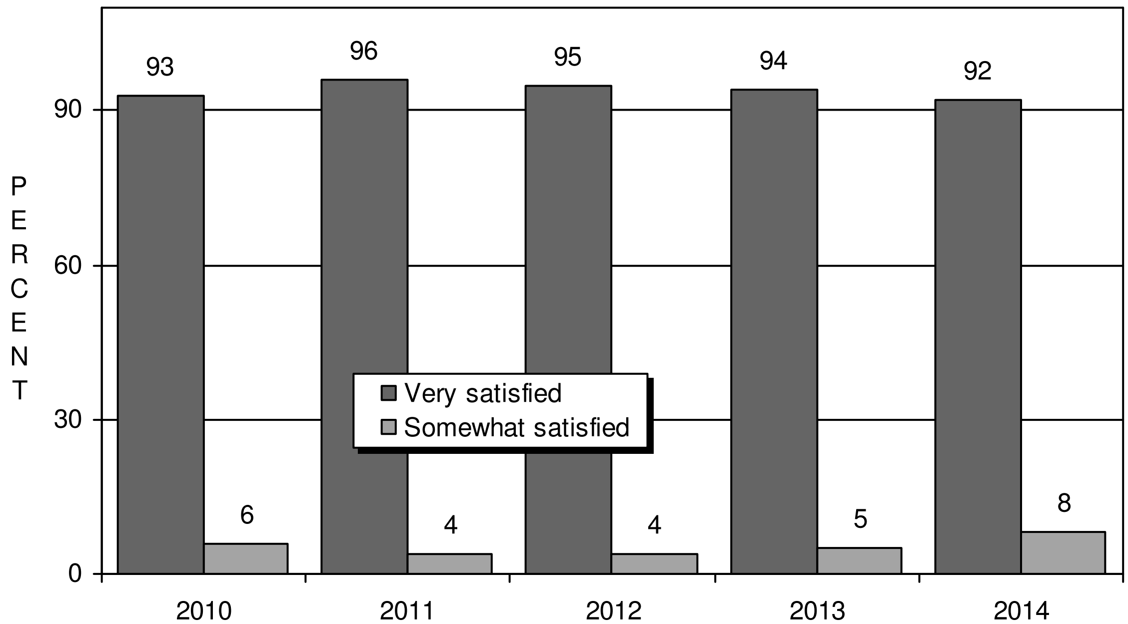
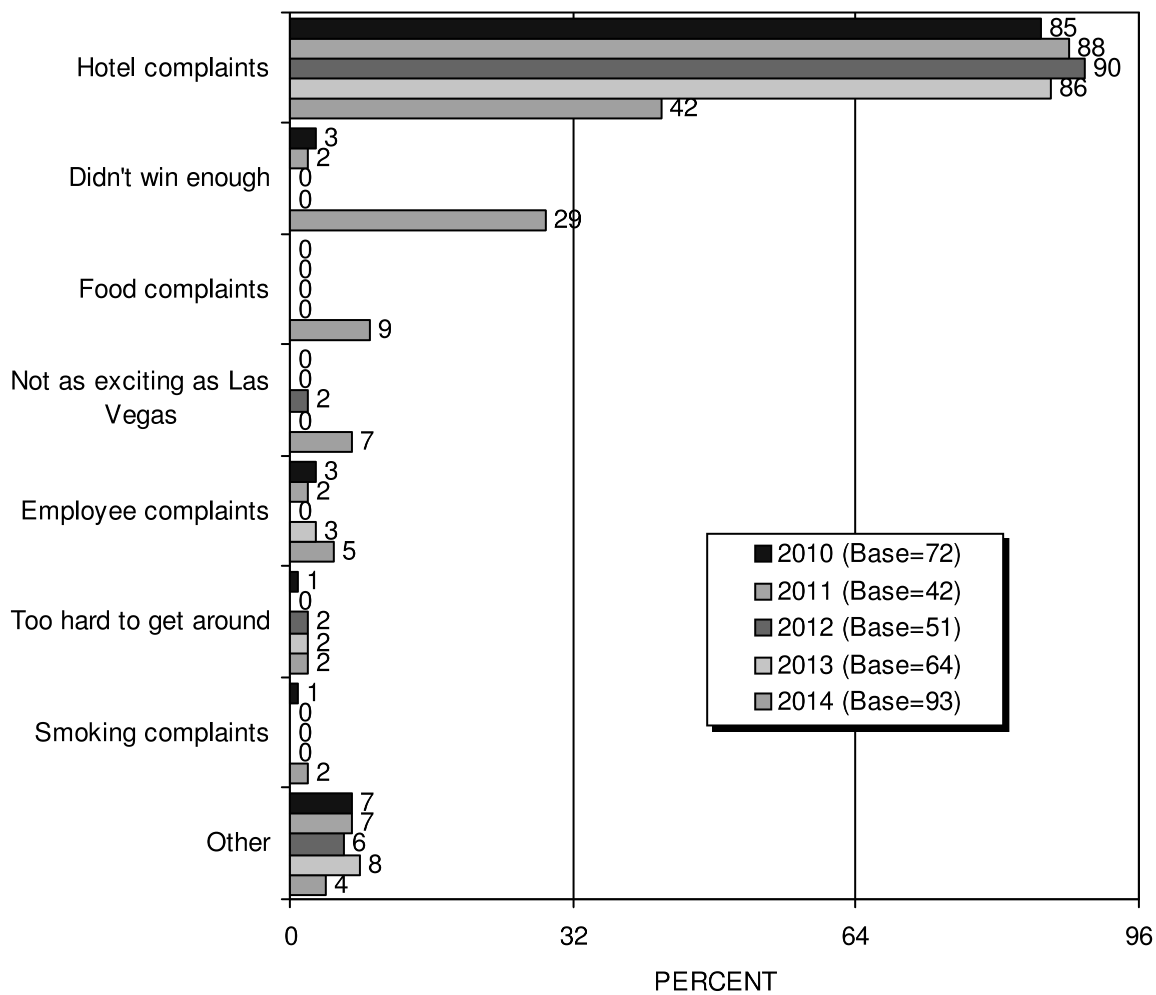
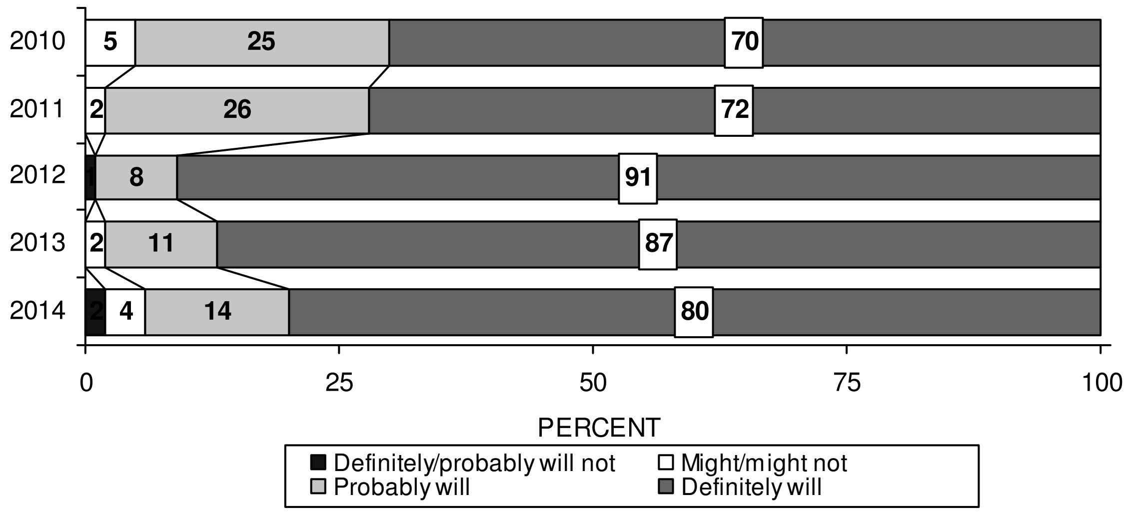


FIGURE 61
Why Not "Very" Satisfied With Visit
(Among Those Who Were "Somewhat" Satisfied)



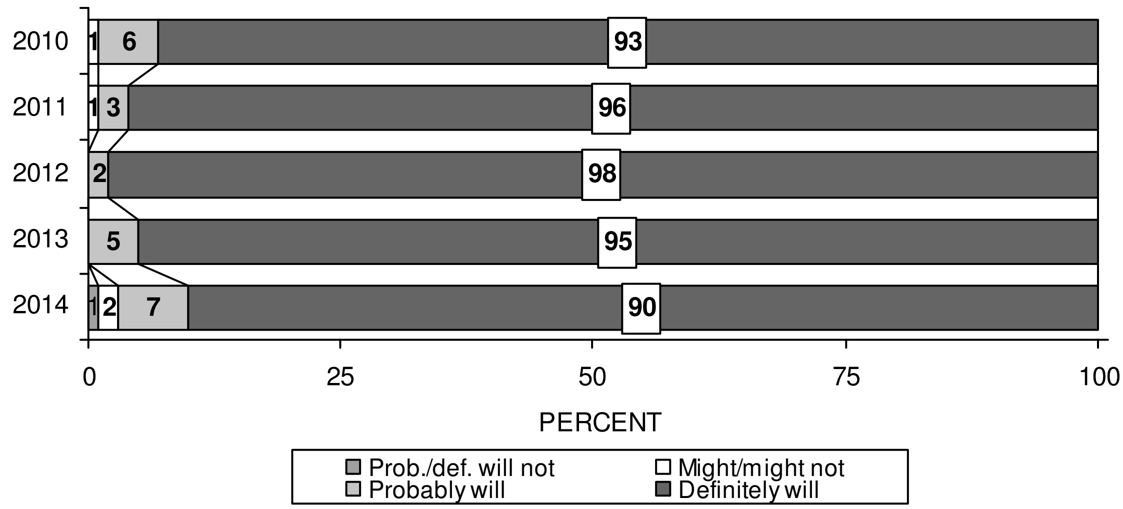
Those who were "somewhat" satisfied were asked why they were not "very" satisfied (Figure 61). Forty-two percent (42%) mentioned complaints with their hotels, down from 2010 – 2013 readings. Twenty-nine percent (29%) said they didn't win enough gambling, up from past years.

FIGURE 62
Likelihood Of Returning To Laughlin Next Year



Visitors were asked how likely they are to return to Laughlin next year (Figure 62). Eighty percent (80%) said they "definitely will" return, down significantly from 91% in 2012 and 87% last year, but up from 70% in 2010, and 72% in 2011. Fourteen percent (14%) said they "probably" will return to Laughlin in the next year, up from 8% in 2012 and 11% last year, while down from 25% in 2010, and 26% in 2011.

FIGURE 63
Likelihood Of Recommending Laughlin To Others



Visitors were also asked how likely they are to recommend Laughlin to others (Figure 63). Ninety percent (90%) said they "definitely will" recommend Laughlin to others, similar to past years.

VISITOR DEMOGRAPHICS

As Figures 64 and 65 show, Laughlin visitors in 2014 were most likely to be married (72%, down from 79% in 2011) and white (84%). Thirty-four percent (34%) of visitors were from California, while one-quarter (26%) were from Arizona (up from 20% in 2010). Five percent (5%) were foreign visitors, down from 8% in 2012. Four in ten (40%) visitors were 65 or older, down significantly from 47% in 2010, 49% in 2011, and 54% in 2012, but up from 34% last year. The average age was 59.1 years old, down from 60.6 in 2010, 61.8 in 2011, and 63.1 in 2012, but up from 57.9 last year. Visitors were more likely to be retired (61%, down from 67% in 2012 but up from 53% in 2010) than employed (33%, down from 41% in 2010 and 38% in 2011). Thirty-eight percent (38%) had a high school diploma or less (the same as last year, but down significantly from 2010 – 2012 readings), while 30% were college graduates (up from 25% in 2010). Fifty-four percent (54%) had a household income of less than $60,000, up from 47% in 2012.

FIGURE 64
VISITOR DEMOGRAPHICS

	2010	2011	2012	2013	2014
GENDER					
Male	50%	51%	50%	51%	51%
Female	50	49	50	49	49
MARITAL STATUS					
Married	75	79	75	72	72
Single	11	8	14	16	15
Separated/divorced	6	5	3	4	6
Widowed	8	8	7	8	7
EMPLOYMENT					
Employed	41	38	30	34	33
Unemployed	1	2	1	1	1
Student	0	1	0	0	0
Retired	53	57	67	62	61
Homemaker	4	2	1	2	5
EDUCATION					
High school or less	43	45	42	38	38
Some college	31	21	28	29	32
College graduate	25	33	31	32	30
Trade/vocational school	1	1	0	1	0
AGE					
21 to 29	3	3	2	2	3
30 to 39	6	5	5	7	6
40 to 49	10	10	9	17	16
50 to 59	18	20	18	25	21
60 to 64	15	14	13	16	14
65 or older	47	49	54	34	40
MEAN	60.6	61.8	63.1	57.9	59.1
BASE	(1200)	(1200)	(1200)	(1200)	(1200)

FIGURE 65
VISITOR DEMOGRAPHICS
(Continued/2)

	2010	2011	2012	2013	2014
ETHNICITY					
White	82%	85%	84%	82%	84%
African-American/Black	3	2	3	3	3
Asian/Asian American	2	1	2	1	2
Hispanic/Latino	12	10	11	13	11
Other	2	1	0	0	0
HOUSEHOLD INCOME					
Less than $20,000	4	3	3	1	2
$20,000 to $39,999	27	17	12	10	13
$40,000 to $59,999	27	31	32	41	39
$60,000 to $79,999	20	24	30	33	25
$80,000 or more	21	23	23	15	20
Not sure/no answer	1	1	0	0	1
VISITOR ORIGIN					
U.S.A.	94	93	92	95	95
Eastern states*	2	1	1	2	2
Southern states†	7	4	5	4	5
Midwestern states‡	14	15	12	13	14
Western states§	71	74	74	76	75
California	35	33	33	35	34
Southern California	32	31	31	33	32
Northern California	3	2	2	2	2
Arizona	20	26	25	25	26
Greater Las Vegas	2	3	3	2	2
Other West	13	13	13	14	12
Foreign	6	7	8	5	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 .... NOT SURE/DK......... REFUSED/NA	**TERMINATE**

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

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

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

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

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

FIRST VISIT 13%	**SKIP TO A6 ON PAGE 3**
VISITED BEFORE .87 NOT SURE/DK ....0 REFUSED/NA..........0	**ASK A2**

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

10.1 MEAN (ALL VISITORS)
11.5 MEAN (REPEAT VISITORS) (N=1046)

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

2.8 MEAN (ALL VISITORS)
3.0 MEAN (REPEAT VISITORS) (N=1046)

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=1046)

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=1046)

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

TO ATTEND A CORPORATE MEETING 0

VACATION/PLEASURE 28

TO GAMBLE.....................................18

VISIT FRIENDS/RELATIVES 32

TO ATTEND A SPECIAL EVENT (E.G., DESERT CHALLENGE, A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)...3

TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT.....................0

OTHER BUSINESS PURPOSES 1

WATER-BASED RECREATION..........5

JUST PASSING THROUGH..............12

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	40
TO GAMBLE	37
VISIT FRIENDS/RELATIVES	13
TO ATTEND A SPECIAL EVENT (E.G., A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)	5
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	1
OTHER BUSINESS PURPOSES	1
WATER-BASED RECREATION	2
JUST PASSING THROUGH	1
SOME OTHER REASON	0
NOT SURE/DK	0
REFUSED/NA	0

INTERVIEWER:
CONTINUE WITH A8.

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

YES	13%
NO	87
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	3
Truck	4
Automobile	77
Motorcycle	0
Recreational Vehicle (RV)	3
REFUSED/NA	0

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

SAME DAY	3%
1-3 DAYS BEFORE	9
4-6 DAYS BEFORE	5
7-14 DAYS BEFORE	19
15-30 DAYS BEFORE	29
31-60 DAYS BEFORE	16
61-90 DAYS BEFORE	7
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 0.3*%	**SKIP TO B4**
NO 99.7	**ASK B3a**
NOT SURE/DK ..... 0 REFUSED/NA 0	**SKIP TO B4a**

*Less than 1/2%.

B3a. What is the MAIN reason you did not use a travel agent to help you plan your trip? **(ACCEPT ONLY ONE RESPONSE.)** (N=1196)

CALLED 800#..36%
GOT INVITE FROM HOTEL/CASINO ...22
USED THE INTERNET 13
DRIVING/DON'T NEED ASSISTANCE..11
PREFER TO MAKE OWN PLANS...........5
DAY TRIP/STAYING WITH FRIENDS/ RELATIVES...3
BUSINESS/COMPANY MADE PLANS....2
ANOTHER PERSON MADE PLANS........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=4)

	YES	NO	DON'T KNOW	RE-FUSED
Influence your decision to visit Laughlin?	25%	75%	0%	0%
Influence your choice of accommodations?	50	50	0	0
"Book" your accommodations?	100	0	0	0
"Book" your transportation?	100	0	0	0

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

YES 18%	**ASK B4b**
NO ....82 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=220)

	YES	NO	DON'T KNOW	RE-FUSED
"Book" your accommodations?	61%	39%	0%	0%
"Book" your transportation?	15	85	0	0

B4c. Did you find information on the Internet that... **(READ LIST)**
(N=220)

	YES	NO	DON'T KNOW	RE-FUSED
Influenced your decision to visit Laughlin?	5%	95%	0%	0%
Influenced your choice of accommodations?	79	21	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?...........	92%	1%	3%	4%	0%	0%
b. Where you would gamble?	88	1	9	1	0	0
c. Which shows you would see? ..	9	0	10	80	0	0

AMONG THOSE TO WHOM THE QUESTION APPLIES:	Before Leaving Home	While En Route To Laughlin	After Arrival	DK/NA	
a. Where you would stay?...........	96%	1%	3	0%	(N=1148)
b. Where you would gamble?	90	1	9	0	(N=1185)
c. Which shows you would see? ..	47	2	50	1	(N=236)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

FROM PERMANENT RESIDENCE.......................... 88%	**SKIP TO C1**
FROM ANOTHER LOCATION 12	**ASK B7**
NOT SURE/DK........................ 0 REFUSED/NA 0	**SKIP TO C1**

B7. Where are you traveling from? **(PROBE FOR LOCATION IMMEDIATELY PRIOR TO LAUGHLIN VISIT.)** (N=144)

LAS VEGAS 40%	**ASK B7a**
ARIZONA ....30 CALIFORNIA.........................12 OTHER.................................19 NOT SURE/DK........................0 REFUSED/NA 0	**SKIP TO C1**

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

Air.. 51% (N=57)

Automobile, truck, RV, bus 49

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	92%
MOTEL	0
RV PARK	2
FRIENDS/RELATIVES	1
DAYTRIP/OTHER	4

<u>LOCATION OF LODGING</u>

LAUGHLIN	92%
BULLHEAD CITY	0
LOCATION COULD NOT BE DETERMINED	3
FRIENDS/RELATIVES	1
DAYTRIP	4

<u>TYPE OF LODGING</u>
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=1148)

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

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

IF RESPONSE TO C1 IS AN RV PARK (CODES 3000-3999), ASK C1a & C2, <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=1132)

a. Booked by phone, calling the hotel, motel, or RV park directly ...76%
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 through a website on the Internet using a desktop or laptop computer 12
e. Booked at a website on the Internet using a smartphone 2
f. Booked at a website on the Internet using a tablet.....................2
g. Booked in person at the hotel, motel, or RV park 4
h. The trip was a gift, prize, or incentive, so the accommodations were booked for you.......................3
i. Not sure because someone else in your party booked the hotel and you don't know how they did it........2

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=175)

EXPEDIA.COM................................ 21%
TRAVEL.COM 0
ORBITZ 1
PRICELINE.COM 2
CHEAPTICKETS 0
TRAVELOCITY................................... 1
YAHOO... 0
AOL 0
HOTWIRE 2
HOTEL WEB SITE (ANY).. 68
OTHER 6
NOT SURE/DK................................... 0
REFUSED/NA 0

C2. How far in advance did you make your reservations for your (hotel room/motel room/RV park space) for this trip to Laughlin? **(ASK AS OPEN END.)** (N=1132)

SAME DAY 4%
1-3 DAYS BEFORE 13
4-6 DAYS BEFORE 7
7-14 DAYS BEFORE 33
15-30 DAYS BEFORE 32
31-60 DAYS BEFORE 6
61-90 DAYS BEFORE 3
MORE THAN 90 DAYS BEFORE 0
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=1107)

ONE 11%
TWO 81
THREE................................5
FOUR OR MORE 4
REFUSED/NA.....................0
<u>2.0</u> MEAN

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

C5. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=1107)

HOTEL/AIRLINE PACKAGE DEAL..........13% HOTEL/AMENITIES PACKAGE DEAL............0 TOUR/ TRAVEL GROUP 0	**ASK C6**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE ....23 REGULAR FULL-PRICE ROOM RATE....17	**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=142)

Less than $50..................5%
$50 - $99 7
$100 - $149 12
$150 OR MORE 75
NOT SURE/REFUSED....0
$223.17 MEAN
$247.50 MEDIAN

C6a. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=142)

OUTDOOR BILLBOARD 0%
BROCHURE 7
E-MAIL OFFER.................................. 1
INTERNET AD (POP-UP OR BANNER AD) 1
OFFER RECEIVED IN THE MAIL.... 26
NEWSPAPER.................................... 4
RADIO... 1
RESERVATION AGENT/ CALL CENTER 18
TELEVISION...................................... 0
TRAVEL AGENT 1
ANY WEB SITE 4
WORD-OF-MOUTH.......................... 33
SOCIAL MEDIA (e.g., Facebook, Twitter, LinkedIn, Google Plus, MySpace, YouTube) 1
OTHER 0
NOT SURE/DK 2
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=445)

Less than $25 .... 20%
$25 - $49............................ 42
$50 OR MORE................... 37
NOT SURE/NO ANSWER... 2
$42.10 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=445)

OUTDOOR BILLBOARD	1%
BROCHURE	2
E-MAIL OFFER	2
INTERNET AD (POP-UP OR BANNER AD)	5
OFFER RECEIVED IN THE MAIL	13
NEWSPAPER	0
RADIO	0
RESERVATION AGENT/ CALL CENTER	32
TRAVEL AGENT	0
ANY WEB SITE	18
WORD-OF-MOUTH	24
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	81
3	6
4 OR MORE	2

2.0 MEAN
2.0 MEDIAN

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

YES	4%
NO	96
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	4%
1	5
2	23
3	34
4	17
5 OR MORE	17

3.5 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	4%
2	5
3	23
4	34
5	17
6 OR MORE	17

4.5 MEAN
4.0 MEDIAN

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

SUNDAY	15%
MONDAY	13
TUESDAY	13
WEDNESDAY	13
THURSDAY	16
FRIDAY	17
SATURDAY	14
REFUSED/NA	0

D1. Have you gambled during this visit to Laughlin?

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

D2. On average, how many hours *PER DAY* did you spend gambling? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. IF GREATER THAN 12, CLARIFY BY ASKING:** "Do you mean that you spent on average **[FILL IN NUMBER OF HOURS]** hours gambling *every day you were here*?") (N=1185)

1 TO 2 HOURS 14%
3 TO 4 HOURS 29
5 TO 6 HOURS 30
7 TO 8 HOURS 18
9 TO 10 HOURS 8
MORE THAN 10 HOURS 1
<u>5.3</u> MEAN
<u>5.0</u> MEDIAN

D3. How many different casinos have you gambled at during your stay in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)** (N=1185)

1 .... 25%
2 26
3 22
4 12
5 TO 6 10
MORE THAN 6 6
<u>2.9</u> MEAN
<u>2.0</u> MEDIAN

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=1185)

\$1 - \$99 .... 1%
\$100 - \$199 5
\$200 - \$299 13
\$300 - \$399 13
\$400 - \$499 11
\$500 - \$599 21
\$600 OR MORE 35
NOT SURE/NO ANSWER 0
<u>\$655.55</u> MEAN
<u>\$500.00</u> MEDIAN

D11. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=1185)

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

D12. **(ASK OF ALL RESPONDENTS.)** In which of the following locations have you gambled at a *casino facility* during the *past 12 months*? Please do not include "card rooms," even though they are similar to casinos. Have you gambled... **(READ LIST)**

A. At a casino on an Indian reservation in California 23%
B. At a casino on an Indian reservation in Arizona 22
C. At a casino on an Indian reservation outside Arizona or California.............. 21
J. Somewhere else in Nevada (outside the Laughlin area) 5
X. OTHER 7

D15. Now that there are more places to gamble outside of Laughlin, do you feel you are MORE LIKELY or LESS LIKELY to visit Laughlin, or does it make NO DIFFERENCE in your decision to visit Laughlin? (IF MORE OR LESS LIKELY, ASK:) Is that MUCH (more/less likely) or SOMEWHAT (more/less likely)?

MUCH MORE LIKELY..................31%
SOMEWHAT MORE LIKELY.......12
NO DIFFERENCE........................54
SOMEWHAT LESS LIKELY...........3
MUCH LESS LIKELY 1
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=154)

A. Downtown Las Vegas (that is, the area on or near Fremont Street)?..........57%
B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?..........................67

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

YES....................... 12%	**ASK B15**
NO....................... 88 NOT SURE/DK ...... 0 REFUSED/NA........ 0	**SKIP TO C15**

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

(N=144)

Hoover Dam...............................15%
Lake Mead 4
Lake Havasu/ Colorado River..28
Lake Mojave/ Davis Dam 26
Grand Canyon............................10
Bryce Canyon...............................0
Zion National Park 0
Oatman, Arizona 49
Other 0

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.)**

$146.52 MEAN (INCLUDING $0)
$147.63 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.)**

$64.97 MEAN (INCLUDING $0)
$77.30 MEAN (EXCLUDING $0)

C16. By the time you leave Laughlin, how much will you have spent on each of the following items *IN TOTAL FOR YOUR ENTIRE TRIP*? Please include only your own, personal expenses and not those of your entire party. **(READ EACH ITEM. ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)**

A. Shopping (gifts, clothing, personal items) .... $65.76 MEAN (INCLUDING $0)
$119.65 MEAN (EXCLUDING $0)

B. Shows/entertainment (not including gambling) .... $7.87 MEAN (INCLUDING $0)
$40.19 MEAN (EXCLUDING $0)

C. Sightseeing .... $8.07 MEAN (INCLUDING $0)
$75.07 MEAN (EXCLUDING $0)

D. Other .... $0.00 MEAN (INCLUDING $0)
$0.00 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 92%	**SKIP TO G1 ON PAGE 13**
Somewhat satisfied 8	**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=93)

HOTEL COMPLAINTS 42%
DIDN'T WIN ENOUGH GAMBLING...... 29
FOOD COMPLAINTS............................. 9
NOT AS EXCITING AS LAS VEGAS...... 7
EMPLOYEE COMPLAINTS 5
TOO HARD TO GET AROUND 2
SMOKING COMPLAINTS 2
OTHER 4

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=7)

HOTEL COMPLAINTS 57%
DIDN'T WIN ENOUGH GAMBLING...... 29
NOISE COMPLAINTS........................... 14

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 80%
Probably will.................................14
Might/might not 4
Probably will not.............................1
Definitely will not 1
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............90%
Probably will recommend 7
Might/might not recommend..........2
Probably will not recommend 1
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......................33%	**ASK G2**
Unemployed ....1 Student ....0 Retired ....61 Homemaker.....................5	**SKIP TO G3**
<u>DO NOT READ</u> REFUSED/NA 0	**SKIP TO G3**

G2. What is your occupation? **(SPECIFY OCCUPATION, NOT TITLE OR COMPANY NAME. "SELF EMPLOYED" IS <u>NOT</u> AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=401)

SALES/CLERICAL WORKERS... 26%

SERVICE WORKERS................. 27

MANAGERS/OFFICIALS/
PROPRIETORS 19

PROFESSIONAL/TECHNICAL ... 17

CRAFT WORKERS/FOREMEN.. 10

OTHER... 1

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

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

GRADE SCHOOL OR
SOME HIGH SCHOOL...................3%

HIGH SCHOOL DIPLOMA
(FINISHED GRADE 12)................35

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

GRADUATED COLLEGE.............29

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

TECHNICAL, VOCATIONAL,
OR TRADE SCHOOL.....................0

REFUSED/NA 0

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

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

Single 15

Separated or divorced..................6

Widowed 7

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 5

MIDWEST 14

WEST 75

CALIFORNIA 34

ARIZONA 26

GREATER LAS VEGAS 2

OTHER WEST.........................12

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	84%
BLACK OR AFRICAN AMERICAN	3
ASIAN OR ASIAN AMERICAN	2
HISPANIC/LATINO	11
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.*)**

59.1 MEAN
61.0 MEDIAN

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

21 to 29	3%
30 to 39	6
40 to 49	16
50 to 59	21
60 to 64	14
65 and older	40
REFUSED/NA	0

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

A. Less than $20,000	2%
B. $20,000 to $29,999	4
C. $30,000 to $39,999	9
D. $40,000 to $49,999	20
E. $50,000 to $59,999	19
F. $60,000 to $69,999	15
G. $70,000 to $79,999	10
H. $80,000 to $89,999	9
I. $90,000 to $99,999	4
J. $100,000 to $149,999	5
K. $150,000 or more	1
NOT SURE/DK	0
REFUSED/NA	1

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

D1. <u>INTERNET – DESKTOP/LAPTOP</u>
Booked through a website on the Internet using a desktop or laptop computer

D2. <u>INTERNET – SMARTPHONE</u>
Booked through a website on the Internet using a smartphone

D3. <u>INTERNET – TABLET</u>
Booked through a website on the Internet using a tablet

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

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

VisitLaughlin.com

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Las Vegas Convention and Visitors Authority
3150 Paradise Road, Las Vegas, NV 89109-9096
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