

MESQUITE VISITOR PROFILE

Fiscal Year 2003

Annual Report

July 1, 2002 to June 30, 2003

Prepared for:

**Las Vegas Convention And
Visitors Authority**

By:

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TABLE OF CONTENTS

	<u>Page</u>
EXECUTIVE SUMMARY	1
INTRODUCTION	8
METHODOLOGY	9
SUMMARY OF FINDINGS	
Reasons For Visiting	10
Travel Planning	19
Trip Characteristics And Expenditures	31
Gaming Behavior And Budgets	52
Attitudinal Information	57
Visitor Demographics	60
<u>APPENDIX</u>	
Questionnaire With Aggregate Results For 2003	

TABLE OF FIGURES

	<u>Page</u>
<u>REASONS FOR VISITING</u>	
FIGURE 1: First Visit vs. Repeat Visit	10
FIGURE 2: Frequency Of Visits In Past Five Years (All Visitors)	11
FIGURE 3: Frequency Of Visits In Past Five Years (Repeat Visitors).....	12
FIGURE 4: Frequency Of Visits In Past Year (All Visitors).....	13
FIGURE 5: Frequency Of Visits In Past Year (Repeat Visitors)	14
FIGURE 6: How First Became Aware Of Mesquite	15
FIGURE 7: Primary Purpose Of Current Visit (All Visitors).....	16
FIGURE 8: Primary Purpose Of Current Visit (Repeat Visitors).....	17
FIGURE 9: Primary Purpose Of Current Visit — 2003 (First-Time vs. Repeat Visitors)	18
<u>TRAVEL PLANNING</u>	
FIGURE 10: Advance Travel Planning	19
FIGURE 11: Transportation To Mesquite	20
FIGURE 12: When Decided Where To Lodge.....	21
FIGURE 13: When Decided Which Shows To See	22
FIGURE 14: When Decided What Attractions To Visit	23
FIGURE 15: When Decided What Events To Attend	24
FIGURE 16: When Decided Where To Gamble	25
FIGURE 17: When Decided What Recreational Activities You Would Enjoy.....	26
FIGURE 18: Travel Agent Assistance	27
FIGURE 19: Touring Other Areas	28
FIGURE 20: Other Places Visited	29
FIGURE 21: Proportion Of All Mesquite Visitors Who Visited Las Vegas	30
<u>TRIP CHARACTERISTICS AND EXPENDITURES</u>	
FIGURE 22: Adults In Immediate Party.....	31
FIGURE 23: People In Party Under Age 21	32
FIGURE 24: Nights Stayed	33
FIGURE 25: Days Stayed	33
FIGURE 26: Day Of Arrival	34
FIGURE 27: Weekend Versus Weekday Arrival	35
FIGURE 28: Whether Mesquite Visit Is Part Of A Longer Trip	36
FIGURE 29: Primary Destination Of Trip.....	37
FIGURE 30: Where Lodged	38
FIGURE 31: How Far In Advance Accommodations Were Booked	39
FIGURE 32: Type Of Room Rate.....	40
FIGURE 33: Cost Of Package — Per Person	41
FIGURE 34: Package Purchased Directly From A Hotel.....	42

TABLE OF FIGURES (Continued/2)

	<u>Page</u>
FIGURE 35: Where First Heard About The Package	43
FIGURE 36: Lodging Expenditures — Average Per Night	44
FIGURE 37: Number Of Room Occupants.....	45
FIGURE 38: Average Trip Expenditures On Food & Drink — And Local Transportation (Including Visitors Who Spent Nothing)	46
FIGURE 39: Average Trip Expenditures On Food & Drink — And Transportation (Among Spenders).....	47
FIGURE 40: Average Trip Expenditures On Recreational Activities, Shows And Entertainment, And Other Expenses (Including Visitors Who Spent Nothing)	48
FIGURE 41: Average Trip Expenditures On Recreational Activities, Shows And Entertainment, And Other Expenses (Among Spenders)	49
FIGURE 42: Whether Played Golf While Visiting Mesquite.....	50
FIGURE 43: Whether Stopped By The Mesquite Visitors Center.....	51
 <u>GAMING BEHAVIOR AND BUDGETS</u>	
FIGURE 44: Whether Gambled While In Mesquite	52
FIGURE 45: Hours Of Gambling — Average Per Day	53
FIGURE 46: Casino Game Played Most Often	54
FIGURE 47: Trip Gambling Budget.....	55
FIGURE 48: Gambling Outside Mesquite.....	56
 <u>ATTITUDINAL INFORMATION</u>	
FIGURE 49: Satisfaction With Visit	57
FIGURE 50: Why Not ‘Very’ Satisfied With Visit	58
FIGURE 51: Why Dissatisfied With Visit	59
 <u>VISITOR DEMOGRAPHICS</u>	
FIGURE 52: Visitor Demographics.....	60
Gender	60
Marital Status.....	60
Employment.....	60
Education.....	60
Age	60
FIGURE 53: Visitor Demographics.....	61
Ethnicity	61
Household Income	61
Visitor Origin	61

EXECUTIVE SUMMARY

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

This report presents the findings from the 1,200 personal interviews conducted by GLS Research from July 1, 2002 to June 30, 2003, as well as findings from 2000, 2001, and 2002 (the first three years the survey was conducted). One hundred (100) in-person interviews were conducted per month in or near Mesquite 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

Eighteen percent (18%) of those surveyed this year were first-time visitors to Mesquite (down from 21%). Among first-time visitors, 38% said their primary reason for visiting Mesquite was vacation or pleasure (the same as last year) and 1% mentioned gambling, the lowest it has been in the past four years. The proportion of first-time visitors who said they were just passing through Mesquite has increased over each of the past four years and currently stands at one-half (50%) of all first-time visitors. Among repeat visitors, 42% mentioned vacation or pleasure as the primary reason for their current visit, about the same as the past two years, while 13% cited gambling (about the same as last year but down from 22% in 2000 and 23% in 2001). About one-third (32%) of repeat visitors said they were just passing through Mesquite, up significantly from each of the past three years. The average number of visits by all visitors in the past year was 8.2, basically the same as the past three years, and 18.6 in the past five years, also about the same as in past years. The average number of visits by repeat visitors in the past year was 9.7, and 22.5 in the past five years, both figures being consistent with past years.

SUMMARY TABLE OF REASONS FOR
VISITING AND VISITATION FREQUENCY

	2000	2001	2002	2003
Proportion of respondents who were first-time visitors	19%	15%	21%	18%
Proportion of respondents whose primary purpose for current trip was vacation or pleasure (first-time visitors)	49%	53%	38%	38%
Proportion of respondents whose primary purpose for current trip was to gamble (first-time visitors)	17%	9%	4%	1%
Proportion of respondents whose primary purpose for current trip was just passing through (first-time visitors)	11%	18%	35%	50%
Proportion of respondents whose primary purpose for current trip was vacation or pleasure (repeat visitors)	48%	44%	42%	42%
Proportion of respondents whose primary purpose for current trip was to gamble (repeat visitors)	22%	23%	15%	13%
Proportion of respondents whose primary purpose for current trip was just passing through (repeat visitors)	9%	15%	27%	32%
Average number of visits in past five years (all visitors)	16.7	20.7	19.7	18.6
Average number of visits in past five years (repeat visitors)	20.4	24.2	24.8	22.5
Average number of visits in past year (all visitors)	7.0	7.3	8.4	8.2
Average number of visits in past year (repeat visitors)	8.4	8.4	10.4	9.7

TRAVEL PLANNING

All visitors arrived in Mesquite via ground transportation (100%), with 1% using bus services. Most visitors decided where to stay in Mesquite before leaving home (77%). The majority of visitors decided which shows to see (79%) and which attractions to visit (60%) after arriving in Mesquite. One-half (50%) of visitors decided where to gamble before leaving home (up significantly over past years), while 44% decided after arriving in Mesquite (down significantly from past years). One in five visitors (22%) decided what events to attend before leaving home (down from last year); 68% decided after arriving in Mesquite (up significantly from last year). More than eight in ten visitors (82%) decided what recreational activities to enjoy before leaving home (up significantly from each of the past three years), but 13% decided after arriving in Mesquite. Only 2% used the assistance of a travel agent in planning their trip to Mesquite. Forty-four percent (44%) visited other places in Nevada and neighboring states. Thirty percent (30%) of all Mesquite visitors also visited Las Vegas on their current trip.

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2000	2001	2002	2003
Proportion of respondents who traveled to Mesquite by ground transportation (automobile/bus/RV)	99%	99%	100%	100%
Proportion of respondents who traveled to Mesquite using bus services	4%	3%	2%	1%
Proportion of respondents who decided where to stay in Mesquite before leaving home	82%	80%	81%	77%
Proportion of respondents who decided which shows to see in Mesquite after arrival	84%	93%	86%	79%
Proportion of respondents who decided which attractions to visit in Mesquite after arrival	88%	96%	75%	60%
Proportion of respondents who decided where to gamble in Mesquite before leaving home	42%	46%	42%	50%
Proportion of respondents who decided where to gamble in Mesquite after arrival	57%	52%	53%	44%
Proportion of respondents who decided what events to attend in Mesquite before leaving home	27%	29%	41%	22%
Proportion of respondents who decided what events to attend in Mesquite after arrival	67%	70%	59%	68%
Proportion of respondents who decided what recreational activities to do in Mesquite before leaving home	41%	38%	63%	82%
Proportion of respondents who decided what recreational activities to do in Mesquite after arrival	57%	60%	36%	13%
Proportion of respondents who used the assistance of a travel agent planning their trip to Mesquite	2%	1%	2%	2%
Proportion of respondents who toured nearby places	47%	35%	46%	44%
Proportion of respondents who visited Las Vegas on their current trip to Mesquite	36%	26%	34%	30%

TRIP CHARACTERISTICS AND EXPENDITURES

The average number of adults per party was 2.2. Only 7% had people under the age of 21 in their immediate party, lower than at any time in the past three years. Sixty-eight percent (68%) of visitors stayed overnight, and 32% were visiting Mesquite just for the day. The average Mesquite visit was 1.7 nights and 2.7 days, both down from last year's readings. Fifty-four percent (54%) stayed in a hotel or motel, down from 63% in 2001 and 64% in 2000. The average number of room occupants was 2.1, and non-package visitors spent an average of \$37.88 per night for lodging, significantly more than in 2000 and 2001. Two-thirds of lodgers (65%) paid a *regular room rate* (up from 57% last year). Fifteen percent (15%) purchased a package trip, with an average package cost of \$192.89. Over the course of their entire stay in Mesquite, visitors spent an average of \$52.89 for food and drink, \$7.31 for local transportation, \$7.05 for recreational activities, \$0.08 for shows, and \$6.55 for other expenses.

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2000	2001	2002	2003
Average number of adults in immediate party	2.4	2.3	2.3	2.2
Proportion of respondents with persons under 21 in their immediate party	12%	10%	9%	7%
Proportion of respondents who stayed overnight	73%	71%	65%	68%
Proportion of respondents who were in Mesquite for the day only	27%	29%	35%	32%
Days stayed (average)	2.8	2.7	3.1	2.7
Nights stayed (average)	1.8	1.7	2.1	1.7
Proportion of respondents who stayed in a hotel or motel room	64%	63%	57%	54%
Number of room occupants (average — hotel/motel only)	2.2	2.1	2.1	2.1
Lodging expenditures (average per night, hotel/motel overnight visitors only — excludes package and tour/travel group visitors)	\$32.38	\$34.87	\$35.43	\$37.88
Proportion of respondents who paid a regular room rate (among those who stayed in a hotel or motel)	64%	74%	57%	65%
Proportion of visitors who bought a hotel/airline package or traveled with a tour/travel group where lodging was included (among those who stayed overnight in a hotel or motel)	11%	9%	13%	15%
Average cost of package per person (among package/tour group visitors)	\$187.08	\$217.60	\$181.90	\$192.89
Average trip expenditures for food and drink (all respondents)	\$64.46	\$51.80	\$60.26	\$52.89
Average trip expenditures for local transport (all respondents)	\$6.47	\$3.91	\$6.13	\$7.31
Average trip expenditures for recreational activities (all respondents)	\$19.81	\$13.27	\$7.63	\$7.05
Average trip expenditures for shows and entertainment (all respondents)	\$1.50	\$0.39	\$0.41	\$0.08
Average trip expenditures for other expenses (all respondents)	\$0.13	\$0.04	\$4.73	\$6.55

GAMING BEHAVIOR AND BUDGETS

Eighty-six percent (86%) of visitors gambled while in Mesquite, up from 83% last year but down from 89% in 2001 and 90% in 2000. Those who gambled budgeted an average of \$215.83 for gambling, down from \$294.66 in 2000 and \$276.17 in 2001. Gamblers spent an average of 3.3 hours per day gambling (down from 3.9 in 2001 and 4.2 in 2000). Seven in ten gamblers (72%) played slot machines (47%) or video machines (25%) most often, down from 78% last year. Seventeen percent (17%) played blackjack most often, up from 14% last year.

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2000	2001	2002	2003
Proportion who gambled while visiting Mesquite	90%	89%	83%	86%
Average trip gambling budget (among those who gambled)	\$294.66	\$276.17	\$242.46	\$215.83
Average number of hours per day spent gambling (among those who gambled)	4.2	3.9	3.4	3.3
Proportion who played slot machines/video machines most often (among those who gambled)	67%	71%	78%	72%
Proportion who played blackjack most often (among those who gambled)	18%	15%	14%	17%

ATTITUDINAL INFORMATION

The vast majority of visitors (94%) reported that they were “very satisfied” with their trip to Mesquite. Among respondents who said they were only “somewhat” satisfied with their trip, 47% had complaints with their hotel (up from around one-quarter in past years), and 23% said it was because they did not win enough money (compared to 36% last year).

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2000	2001	2002	2003
Proportion who were “very satisfied” with their current trip to Mesquite	91%	91%	89%	94%
Proportion who complained about not winning enough money (among those who were “somewhat satisfied”)	25%	22%	36%	23%
Proportion who complained about their hotel (among those who were “somewhat satisfied”)	25%	26%	27%	47%

VISITOR DEMOGRAPHICS

Two-thirds of respondents (66%) were 50 years old or older, and one-quarter (26%) were 65 or older. Only 5% of visitors were less than 30 years old. More than eight in ten visitors (85%) were married, and 80% were from Western states. More than one-half of visitors (56%) had a household income of less than \$60,000 (up from 47% last year), while 37% had incomes of \$60,000 or more. Four in ten (38%) were retired, and 43% had a high school education or less (up from 38% last year).

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2000	2001	2002	2003
Proportion of respondents who were 50 years old or older	57%	61%	65%	66%
Proportion of respondents 65 years old or older	22%	25%	26%	26%
Proportion of respondents 21 to 29 years old	7%	8%	5%	5%
Proportion of respondents who were married	78%	77%	82%	85%
Proportion of respondents with a household income less than \$60,000	57%	60%	47%	56%
Proportion of respondents with a household income of \$60,000 or more	29%	27%	38%	37%
Proportion of respondents who were retired	37%	41%	40%	38%
Proportion of respondents with a high school diploma or less	43%	46%	38%	43%
Proportion of respondents who were from the West	81%	81%	79%	80%

SUMMARY OF ECONOMIC IMPACT FACTORS

The following table summarizes the various factors included throughout this report related to the *economic impact* of Mesquite visitors between July 1, 2002 and June 30, 2003 — the time period covered by this report:

SUMMARY TABLE OF ECONOMIC IMPACT FACTORS

	2000	2001	2002	2003
Days stayed (average)	2.8	2.7	3.1	2.7
Nights stayed (average)	1.8	1.7	2.1	1.7
Proportion of respondents who stayed overnight	73%	71%	65%	68%
Proportion of respondents who stayed in a hotel or motel room (among those who stayed overnight)	64%	63%	57%	54%
Lodging expenditures (average per night, hotel/motel overnight visitors only — excludes package and tour/travel group visitors)	\$32.38	\$34.87	\$35.43	\$37.88
Proportion of visitors who bought a hotel or airline package or were traveling as part of a tour/travel group where accommodations were included (among those who stayed overnight in a hotel or motel)	11%	9%	13%	15%
Average cost of package per person (among package/tour group visitors)	\$187.08	\$217.60	\$181.90	\$192.89
Number of room occupants (average — hotel/motel only)	2.2	2.1	2.1	2.1
Average trip expenditures for food and drink (all respondents)	\$64.46	\$51.80	\$60.26	\$52.89
Average trip expenditures for local transportation (all respondents)	\$6.47	\$3.91	\$6.13	\$7.31
Average trip expenditures for recreational activities (all respondents)	\$19.81	\$13.27	\$7.63	\$7.05
Average trip expenditures for shows (all respondents)	\$1.50	\$0.39	\$.41	\$0.08
Average trip expenditures for other expenses (all respondents)	\$0.13	\$0.04	\$4.73	\$6.65
Proportion who gambled while visiting Mesquite (all respondents)	90%	89%	83%	86%
Average trip gambling budget (among those who gambled)	\$294.66	\$276.17	\$242.46	\$215.83

Details on these economic impact factors can be found throughout the body of this report.

INTRODUCTION

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

More specifically, the Mesquite Visitor Profile aims:

- To provide a profile of Mesquite 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 visitors 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. One hundred (100) interviews were conducted each month for 12 months from July 2002 through June 2003. Qualified survey respondents were visitors to Mesquite (non-residents) who were at least 21 years of age. Only visitors who planned to leave Mesquite within 24 hours were asked to complete the survey.

Visitors were intercepted near Mesquite 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 2003 study, as well as the results from 2000, 2001, and 2002 (the first three years the study was conducted). 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 four years, it is because the question was not asked all four years.

Details on the findings and conclusions of the survey are presented in the following sections of this report.

SUMMARY OF FINDINGS

REASONS FOR VISITING

In the current study, 82% of respondents said they had visited Mesquite before, up significantly from 79% last year. Eighteen percent (18%) were first time visitors, down from 21% the year before (Figure 1).

FIGURE 1
First Visit vs. Repeat Visit

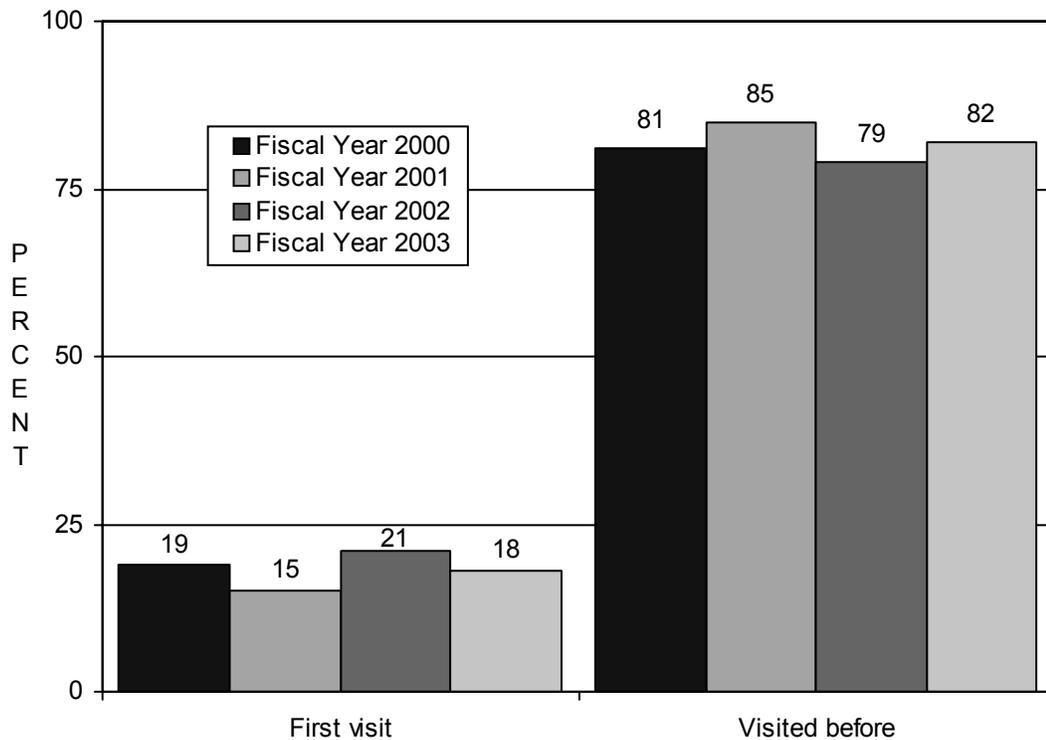
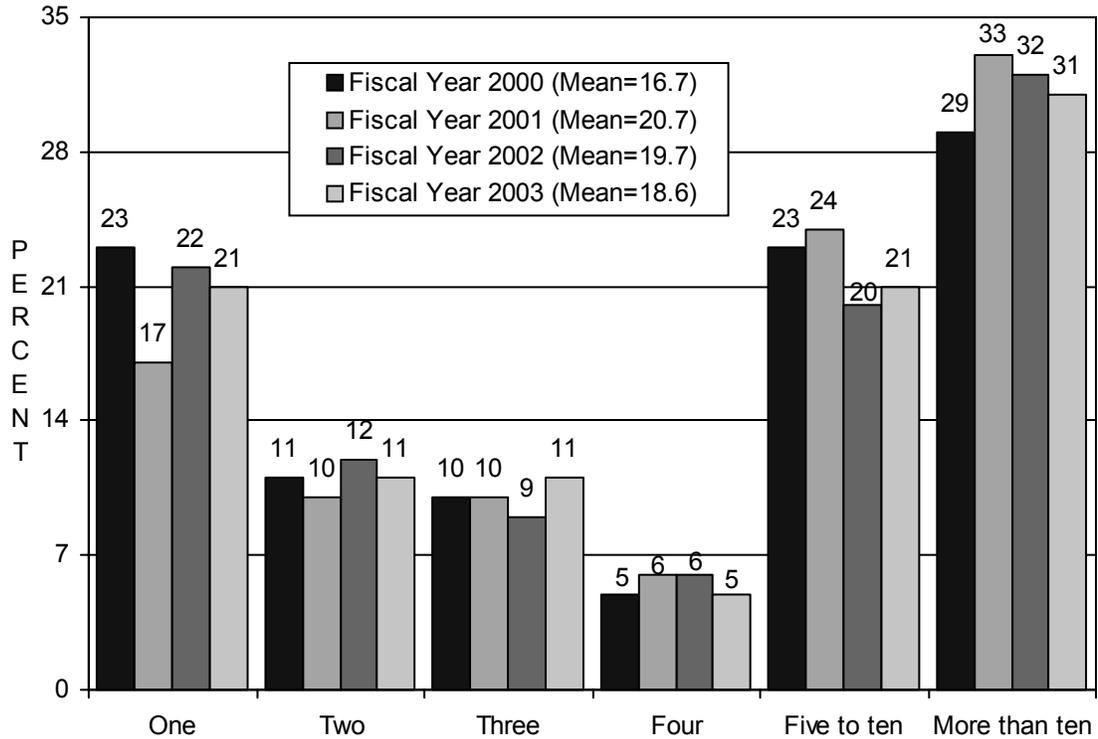
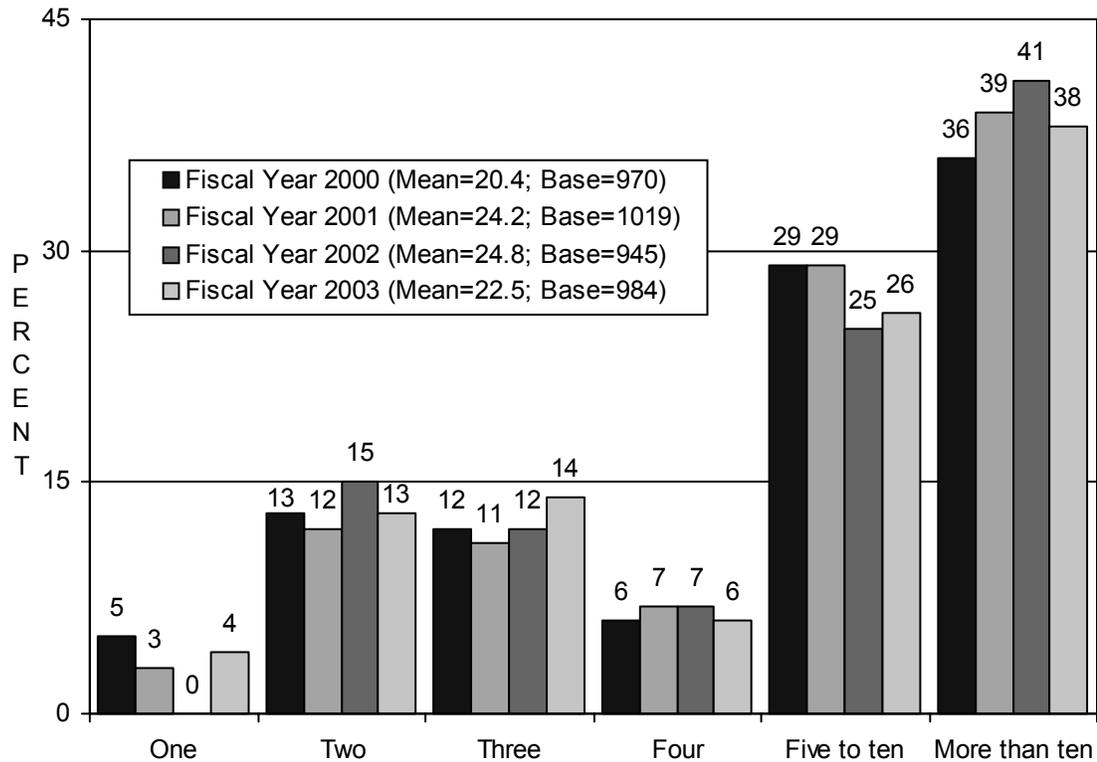


FIGURE 2
Frequency Of Visits In Past Five Years
(Among All Visitors)



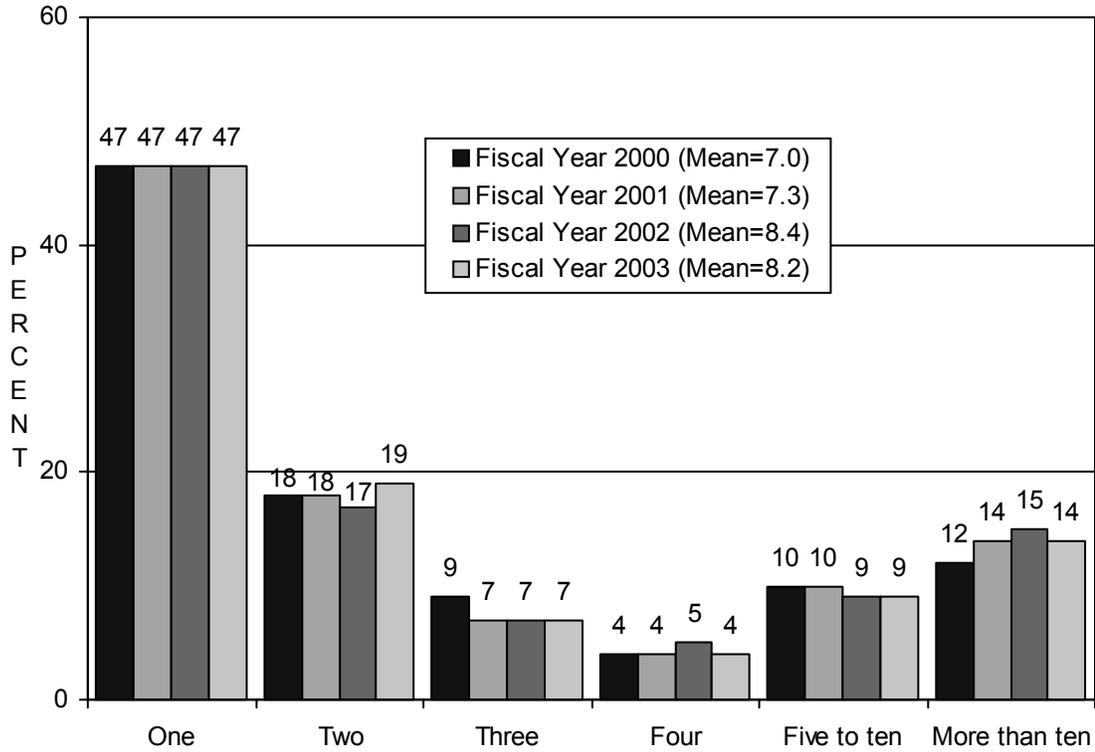
The mean number of visits to Mesquite in the past five years *among all visitors* was 18.6, about the same as the past three years (Figure 2). For the second consecutive year, the number of visitors who said their current trip was the first time they have visited Mesquite in the past five years (22% in 2002 and 21% in 2003) was up significantly from the figure recorded in 2001 (17%).

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



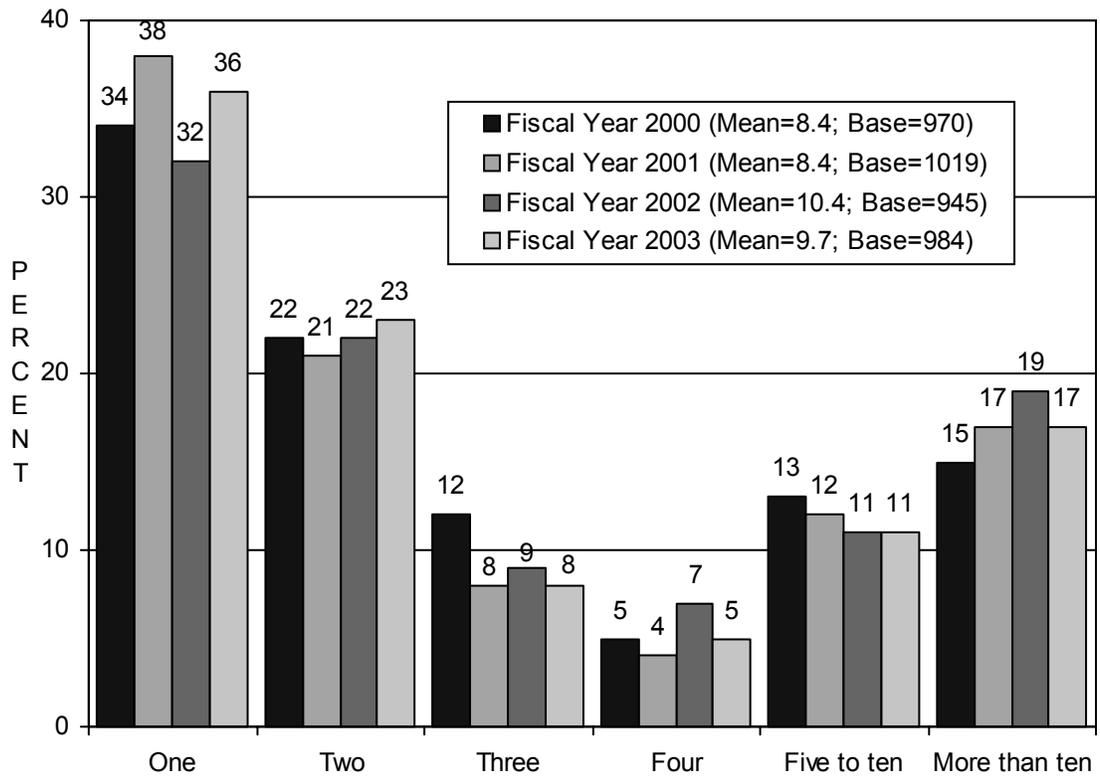
The average number of visits to Mesquite during the past five years *among repeat visitors* was 22.5, about the same as in past years (Figure 3). The proportion of repeat visitors who said this was their first trip to Mesquite in five years (4%) was up significantly from less than 1% last year.

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



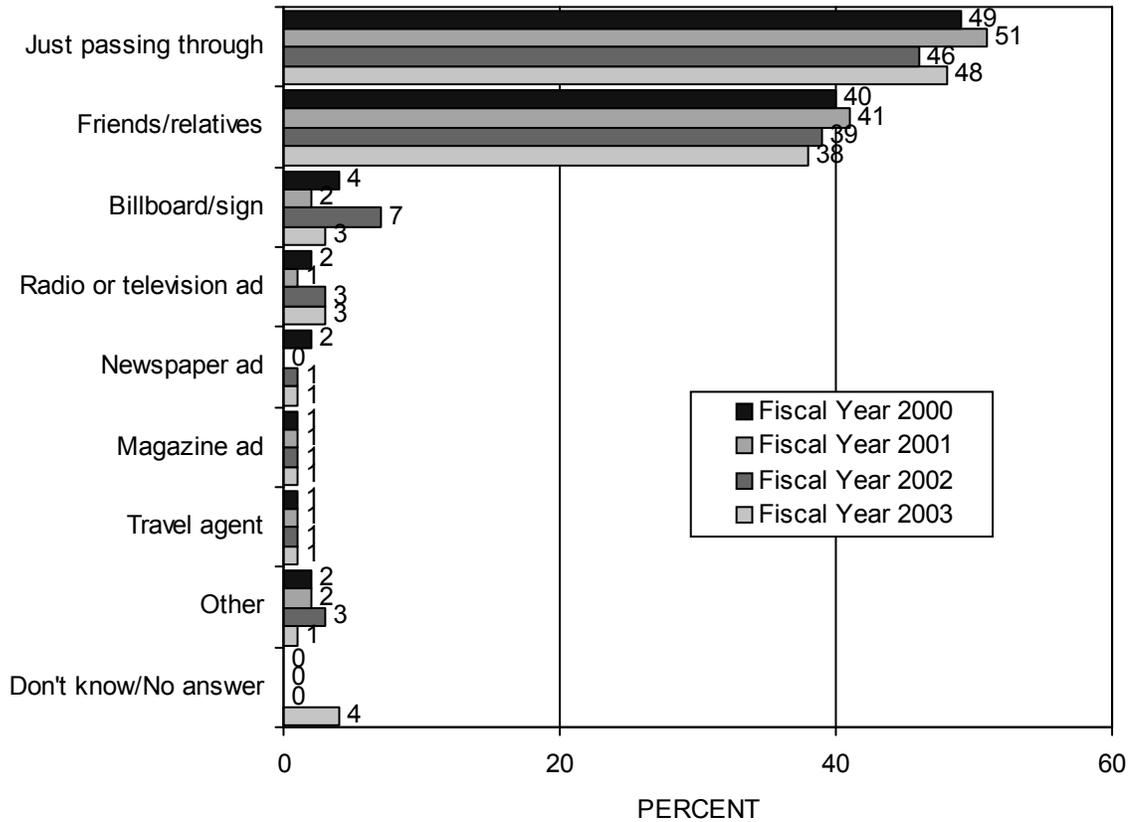
Among *all visitors*, respondents reported visiting Mesquite an average of 8.2 times in 2003, basically the same as in the past three years (Figure 4).

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



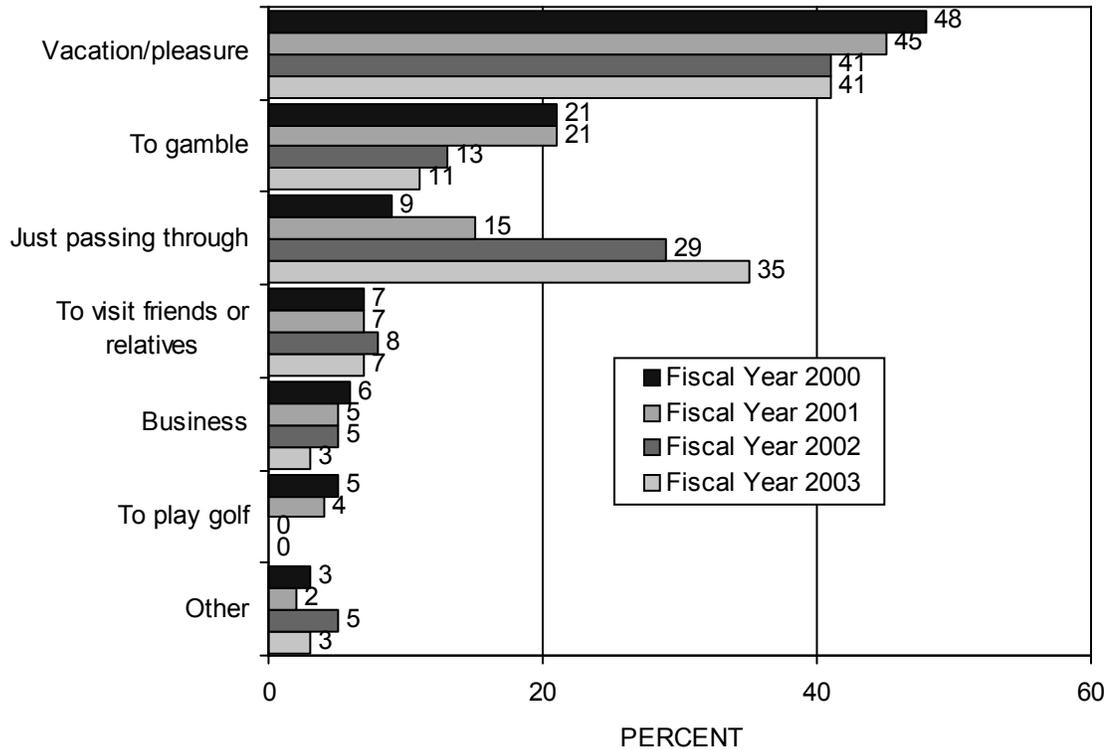
During the past year, repeat visitors averaged 9.7 trips to Mesquite, consistent with past years (Figure 5).

FIGURE 6
How First Became Aware Of Mesquite



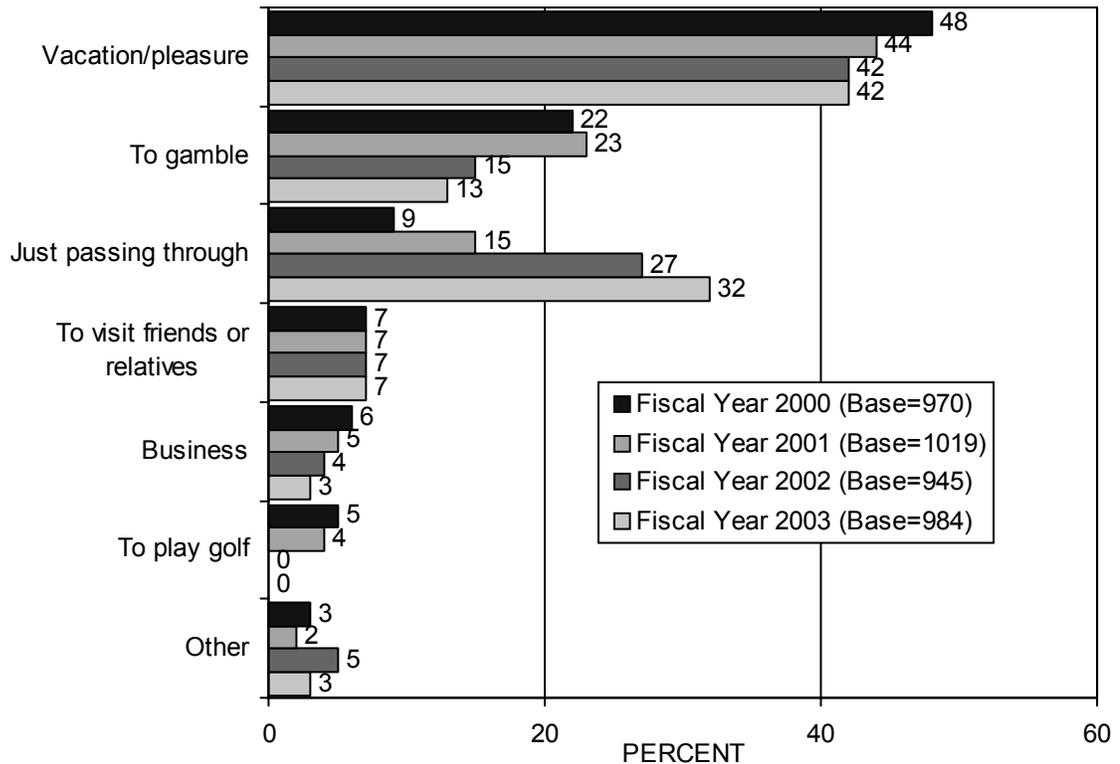
As in past years, most Mesquite visitors said they first became aware of Mesquite while passing through (48%) or from friends and relatives (38%). Three percent (3%) said they first found out about Mesquite from a billboard or a sign (down from a high of 7% last year) while another 3% said they first found out about Mesquite from a radio or television ad (up from 1% two years ago) (Figure 6).

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



As in the past, the largest proportion of Mesquite visitors (41%) said they were visiting for vacation or pleasure, similar to last year but down from a high of 48% in 2000. The proportion who said they were just passing through has increased steadily over the past four years, from 9% in 2000 to 15% in 2001, 29% in 2002, and 35% in 2003. Eleven percent (11%) said they came to gamble, about the same as last year but down from 21% in both 2000 and 2001 (Figure 7). Seven (7%) percent were visiting friends or relatives. Three percent (3%) were in town on business, down from 6% in 2000 and 5% in 2001. **Although 8% of visitors indicated they played golf during their trip (see Figure 42 on Page 50), no visitors listed as the *primary* purpose of their trip.**

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



Among repeat visitors to Mesquite, the largest proportion (42%) said they were visiting for vacation or pleasure, about the same as the past two years but down from the high of 48% in 2000. Nearly one-third (32%) said they were just passing through, a proportion that has increased steadily over the past four years (9% in 2000, 15% in 2001, and 27% in 2002). Thirteen percent (13%) said they came to gamble, about the same as last year but down significantly from 23% in 2001 and 22% in 2000 (Figure 8). Seven percent (7%) were visiting friends or relatives. Three percent (3%) were in town on business, down from 6% in 2000 and 5% in 2001. No repeat visitors were in Mesquite primarily to play golf, compared to 5% in 2000 and 4% in 2001.

FIGURE 9
Primary Purpose Of Current Visit — 2003
(First-Time vs. Repeat Visitors)

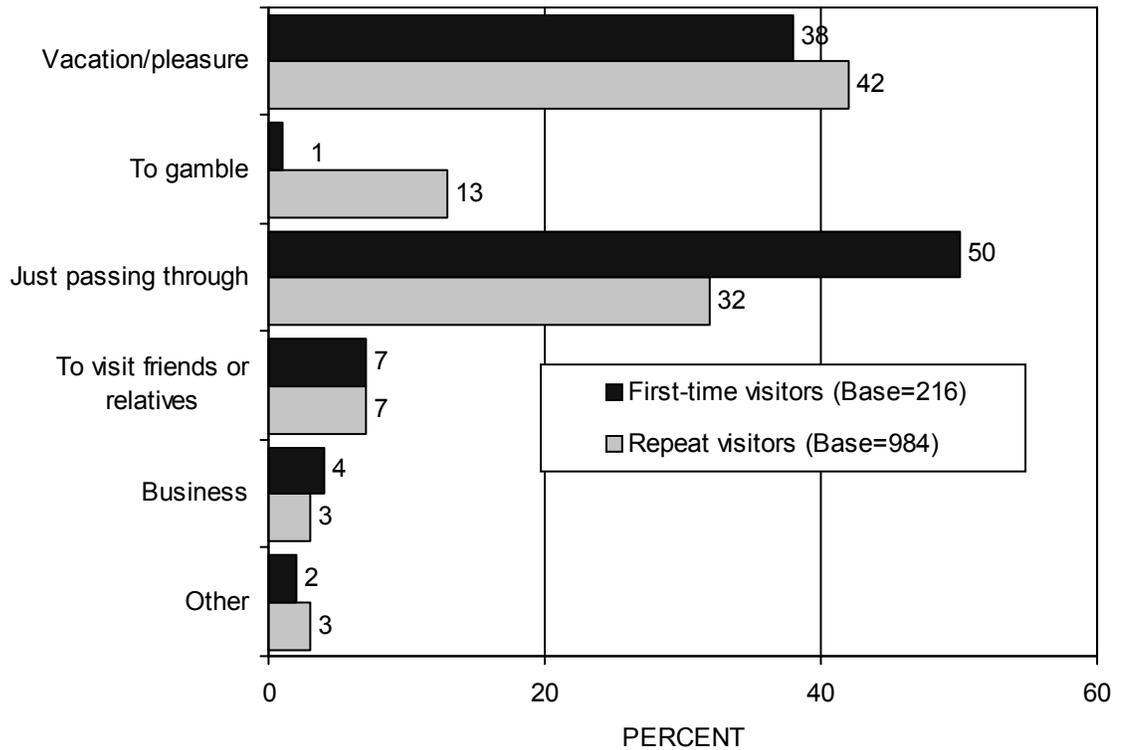


Figure 9 compares *repeat visitors* with *first-time visitors* in terms of purpose of their *current* visit for 2003. First-time visitors (50%) were significantly more likely than repeat visitors (32%) to say they were just passing through Mesquite. Repeat visitors were more likely than first-time visitors to report visiting Mesquite primarily for vacation or pleasure (42% vs. 38%), or to gamble (13% vs. 1%).

TRAVEL PLANNING

Travel planning varied broadly — from same-day planning to travel plans made more than 90 days in advance. Similar to last year, one in four visitors (26%) said they decided to visit Mesquite the same day they visited, up significantly from one in five visitors (21%) in 2000 and 2001 (Figure 10). Nine percent (9%) planned their trip to Mesquite more than 90 days in advance, down significantly from 13% last year, but more in line with readings from 2000 and 2001.

FIGURE 10
Advance Travel Planning

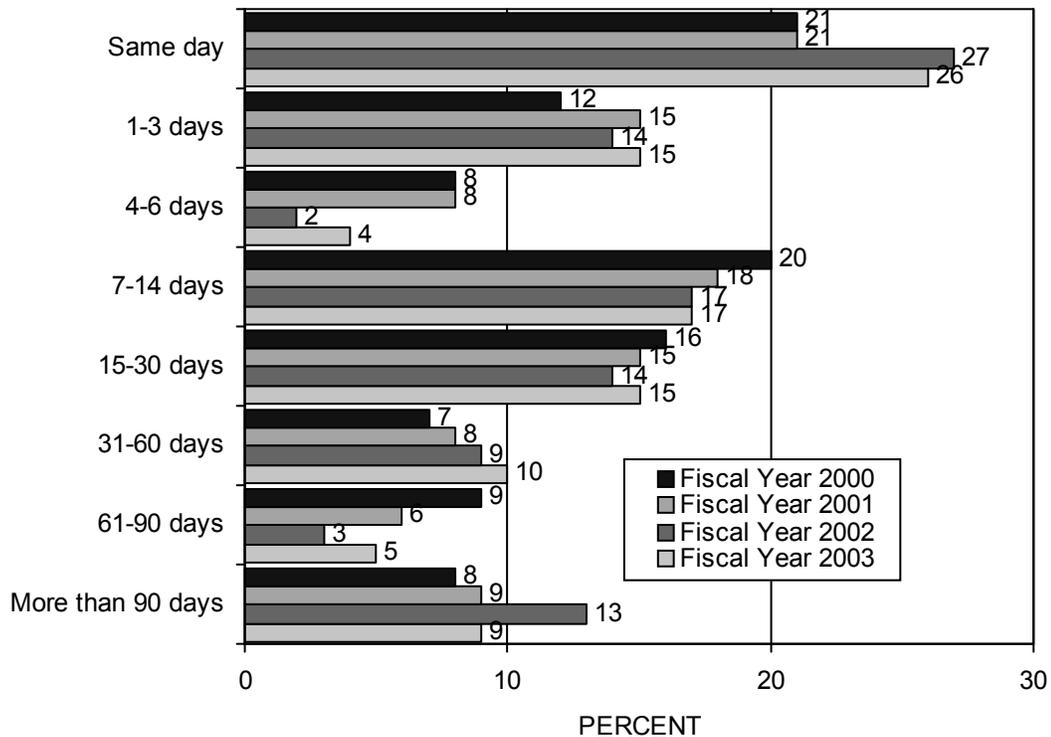
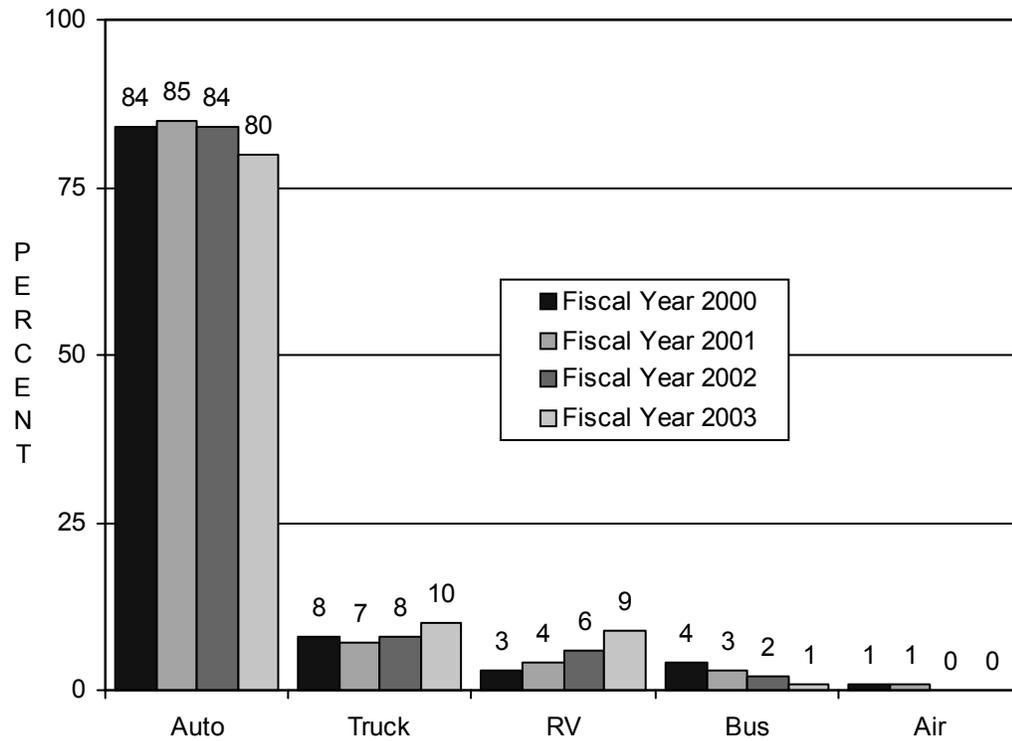
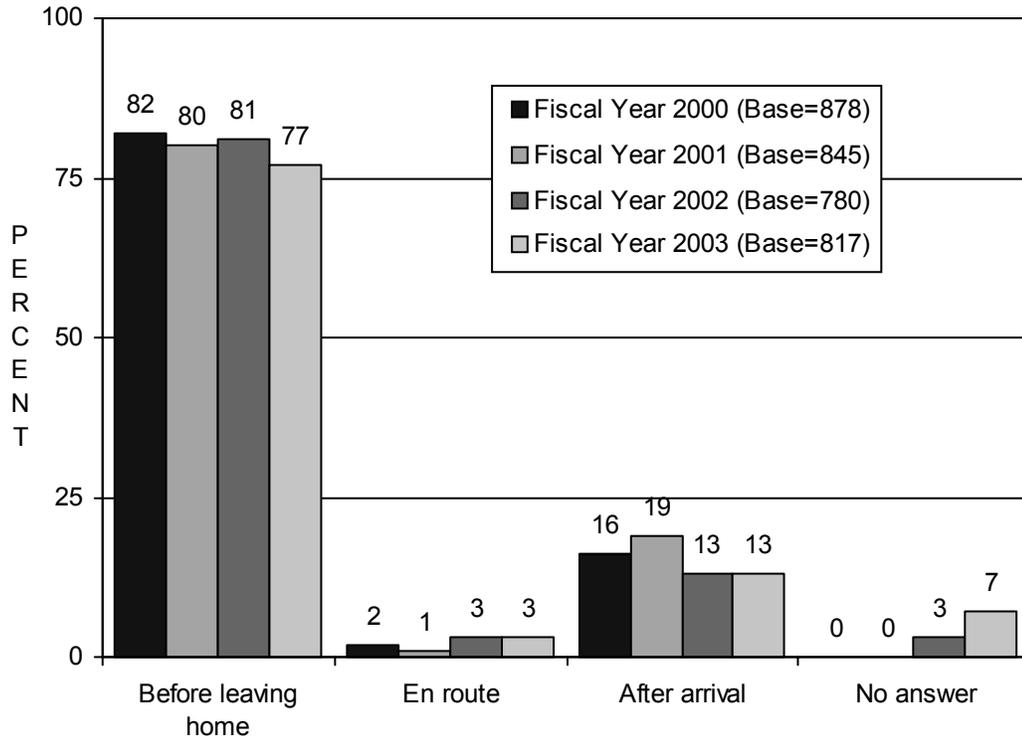


FIGURE 11
Transportation To Mesquite



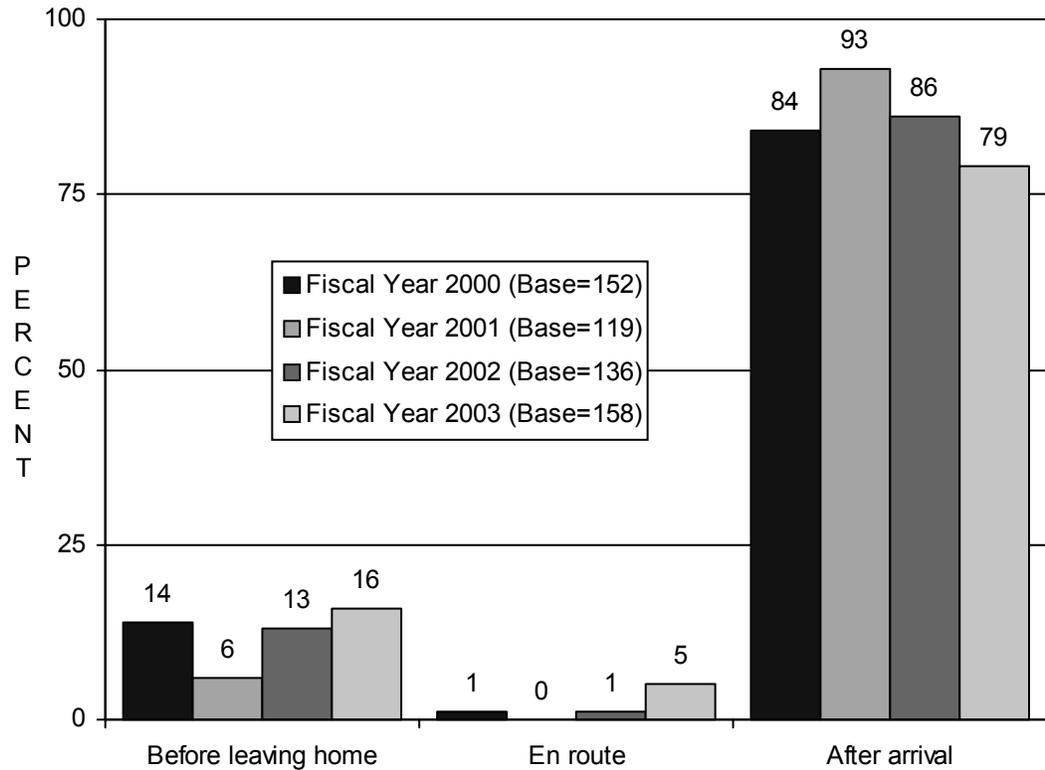
Almost all Mesquite visitors (99%) arrived in a personal vehicle. Eighty percent (80%) drove an automobile, down significantly from 84% in 2000 and 2002, and 85% in 2001. Ten percent (10%) drove a truck, up significantly from 8% in 2000 and 2002, and 7% in 2001. Nine percent (9%) drove an RV, up significantly from 3% in 2000, 4% in 2001, and 6% in 2002 (Figure 11). One percent (1%) of visitors arrived by bus (down significantly from 4% in 2000). No visitors said they arrived by air.

FIGURE 12
When Decided Where To Lodge
(Among Those Who Stayed Overnight)



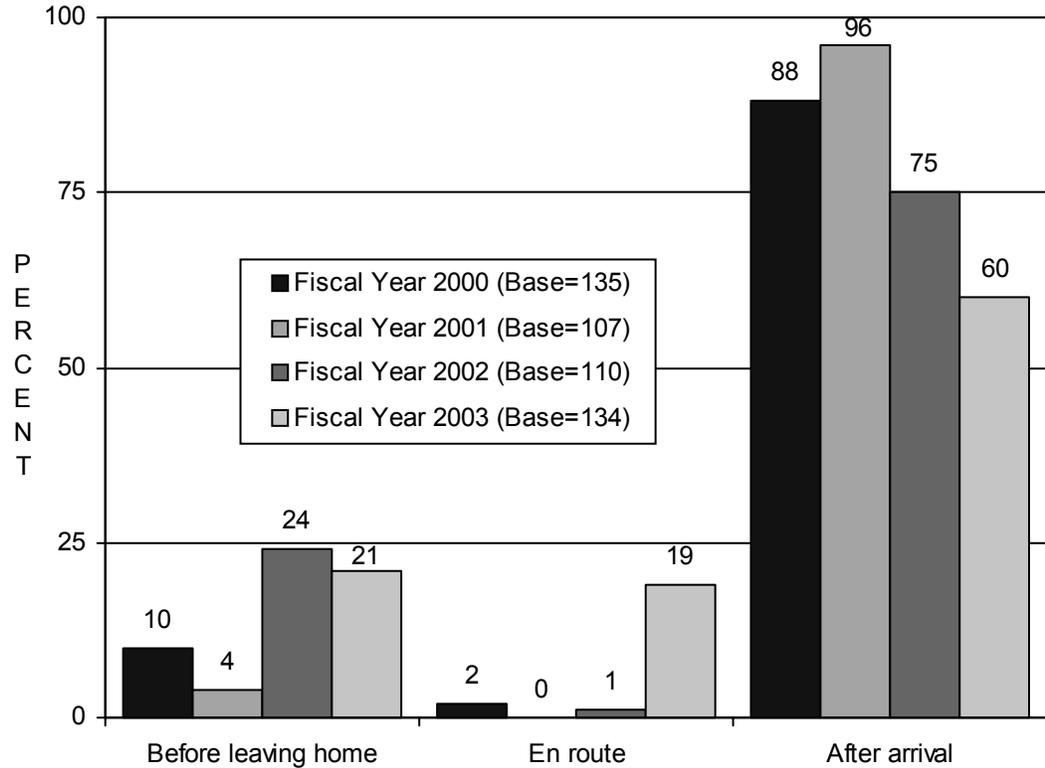
Most overnight visitors decided where to stay in Mesquite prior to their visits (77%, down from 82% in 2000). However, 13% decided after arriving in Mesquite, (down from 16% in 2000 and 19% in 2001). Three percent (3%) decided while *en route* to Mesquite (Figure 12).

FIGURE 13
 When Decided Which Shows To See
 (Among Those Who Saw Shows)



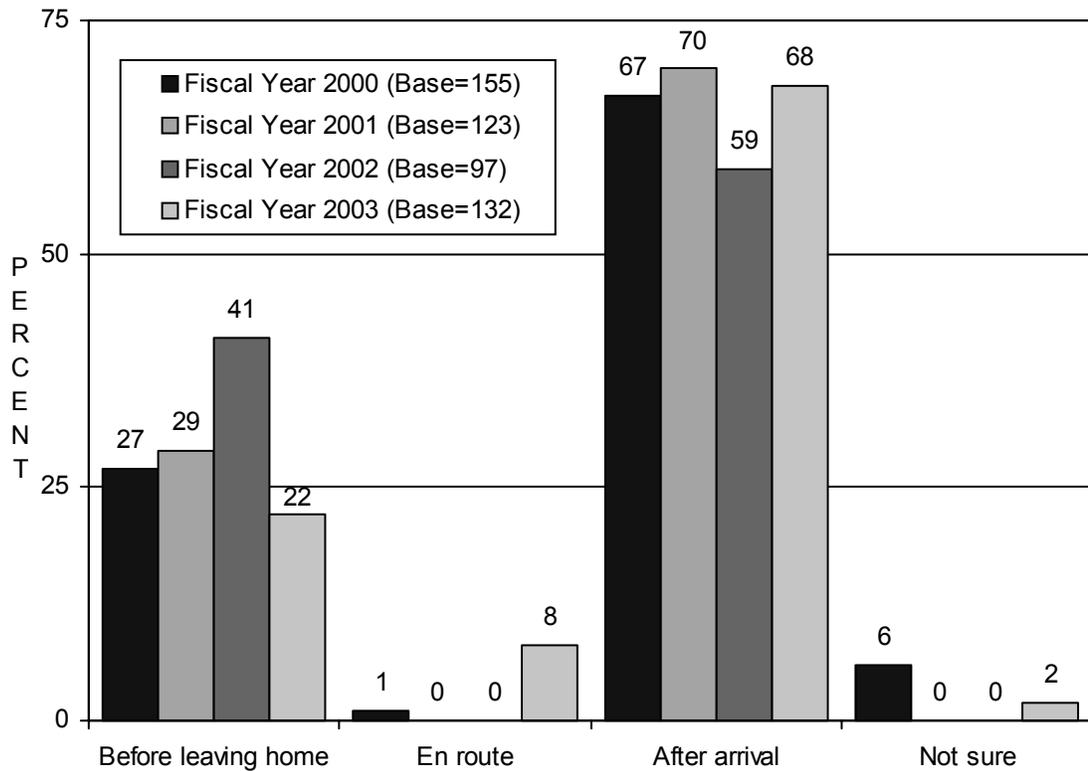
Among the 13% of visitors who reported going to a show in Mesquite, 16% decided what shows to see prior to arriving in Mesquite — up significantly from the low of 6% recorded in 2001 (Figure 13). Most visitors (79%) decided what shows to see after arrival, although this figure was down from the high of 93% in 2001. Five percent (5%) said they decided while *en route* to Mesquite, a significant increase over 1% or less in past years.

FIGURE 14
When Decided What Attractions To Visit
(Among Those Who Visited Attractions)



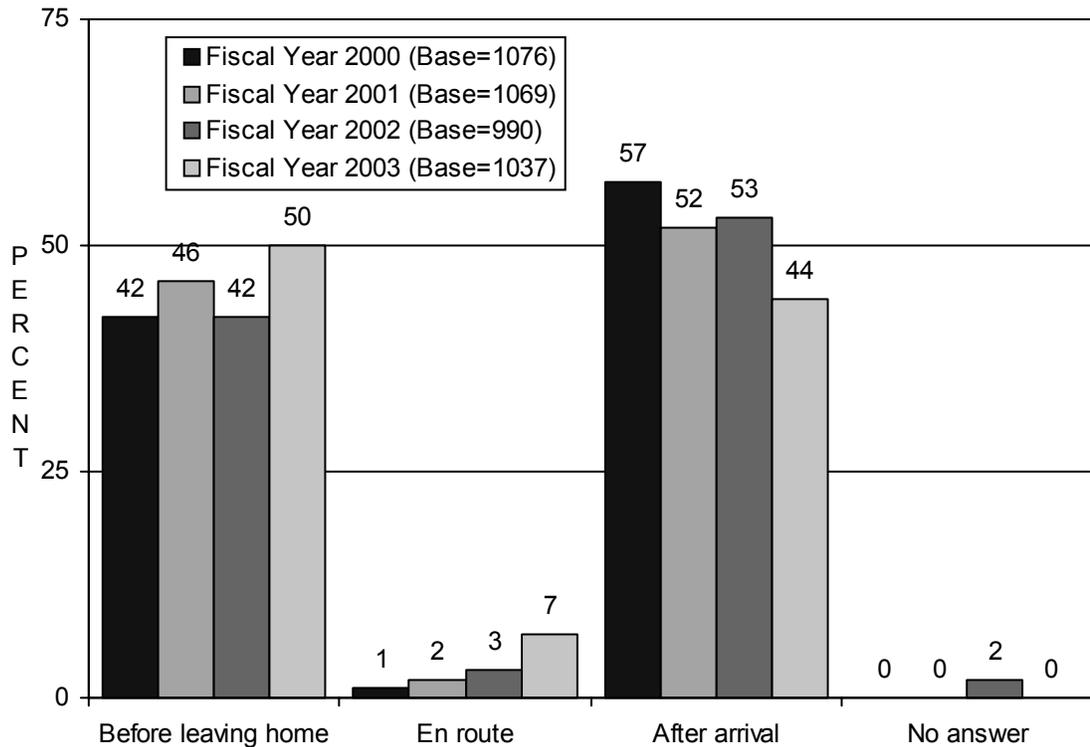
Among the 11% of visitors who reported visiting an attraction in 2003, 21% decided what attractions to see prior to arriving in Mesquite — up from 10% in 2000 and 4% in 2001 (Figure 14). Three in five visitors (60%) decided what attractions to see after their arrival, down from 88% in 2000, 96% in 2001, and 75% in 2002. Nineteen percent (19%) said they decided *en route* to Mesquite, a significant increase from the past three years.

FIGURE 15
 When Decided What Events To Attend
 (Among Those Who Attended Events)



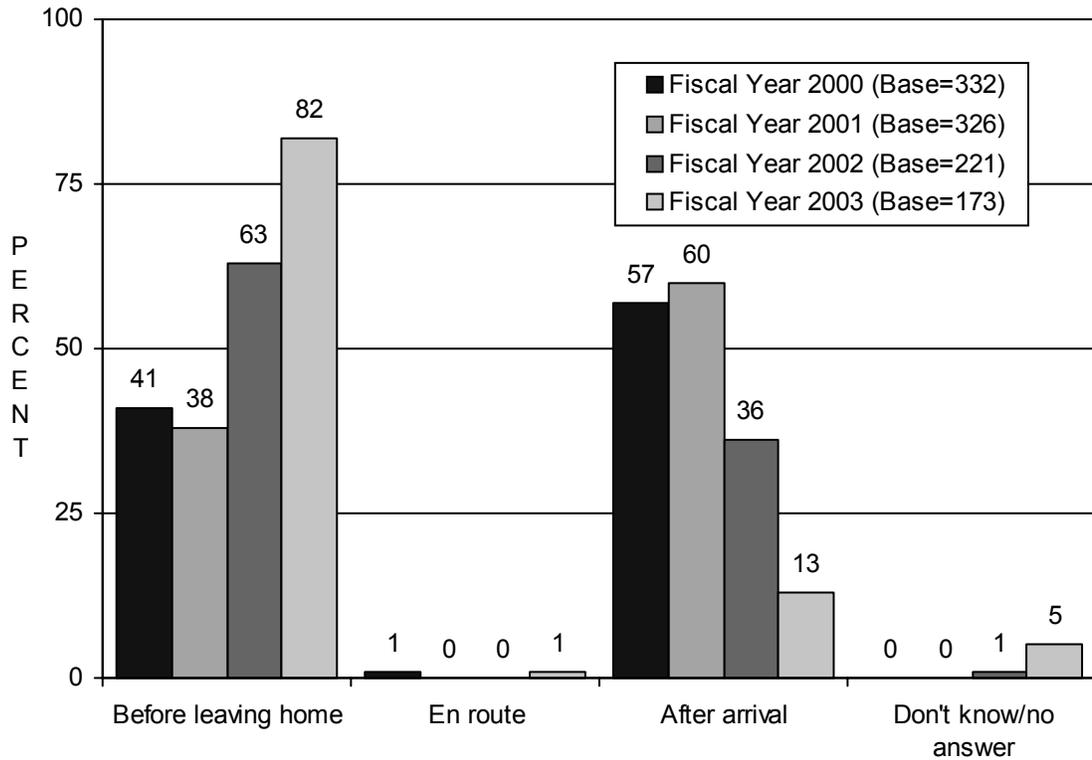
Among the 11% of visitors who reported attending a special event in Mesquite, one in five (22%) decided what events to attend prior to their arrival, down significantly from 41% last year but in line with 2000 and 2001 figures (Figure 15). Sixty-eight percent (68%) said they decided after their arrival (not significantly different from past years), while 8% said they decided while *en route* to Mesquite, up from 1% in 2000. Two percent (2%) said they were not sure when they decided or gave no answer.

FIGURE 16
When Decided Where To Gamble
(Among Those Who Gambled)



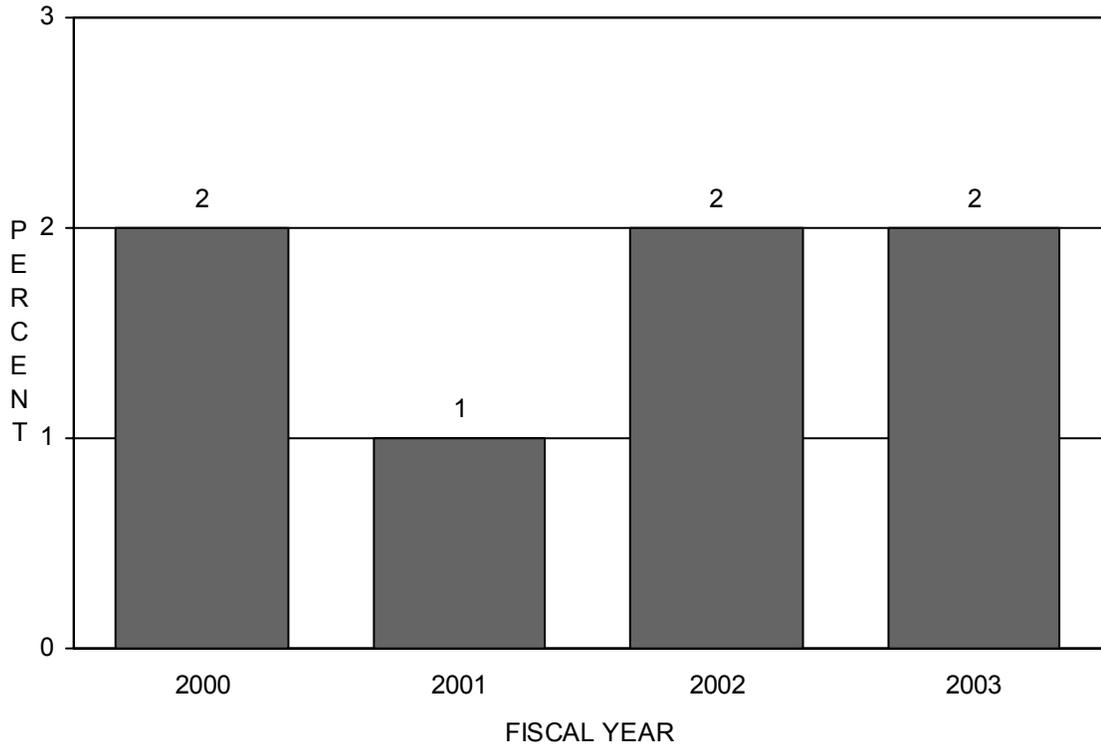
Among the visitors who gambled during their visit, one-half (50%) said they decided where to gamble in Mesquite before leaving home, up significantly from 42% in both 2000 and 2002 (Figure 16). Forty-four percent (44%) said they decided where to gamble after they arrived in Mesquite, down significantly from 57% in 2000, 52% in 2001, and 53% last year. Seven percent (7%) said they decided where to gamble while *en route* to Mesquite, up significantly from 3% or less in prior years.

FIGURE 17
 When Decided What Recreational Activities You Would Enjoy
 (Among Those Who Engaged In Recreational Activities)



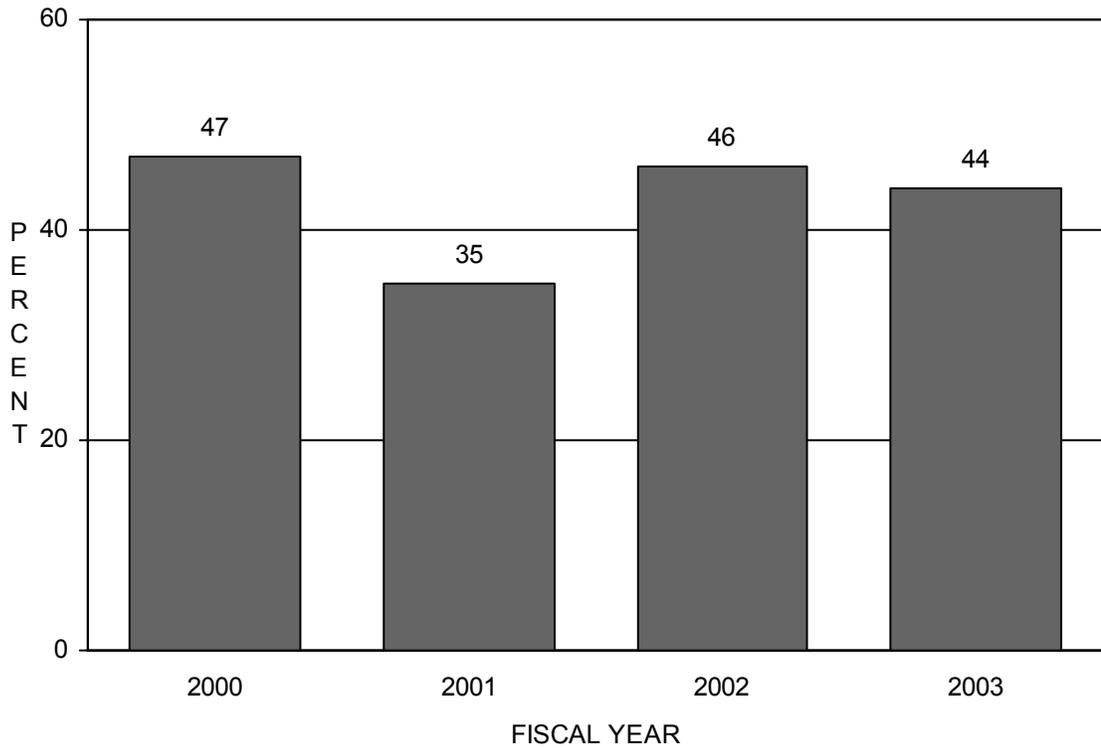
Among the 14% of visitors who engaged in recreational activities during their visit, more than eight in ten (82%) said they decided what recreational activities they would enjoy in Mesquite before leaving home, up from 41% in 2000, 38% in 2001, and 63% in 2002 (Figure 17). However, 13% said they decided what recreational activities they would enjoy after arriving in Mesquite (down from 57% in 2000, 60% in 2001, and 36% last year).

FIGURE 18
Travel Agent Assistance



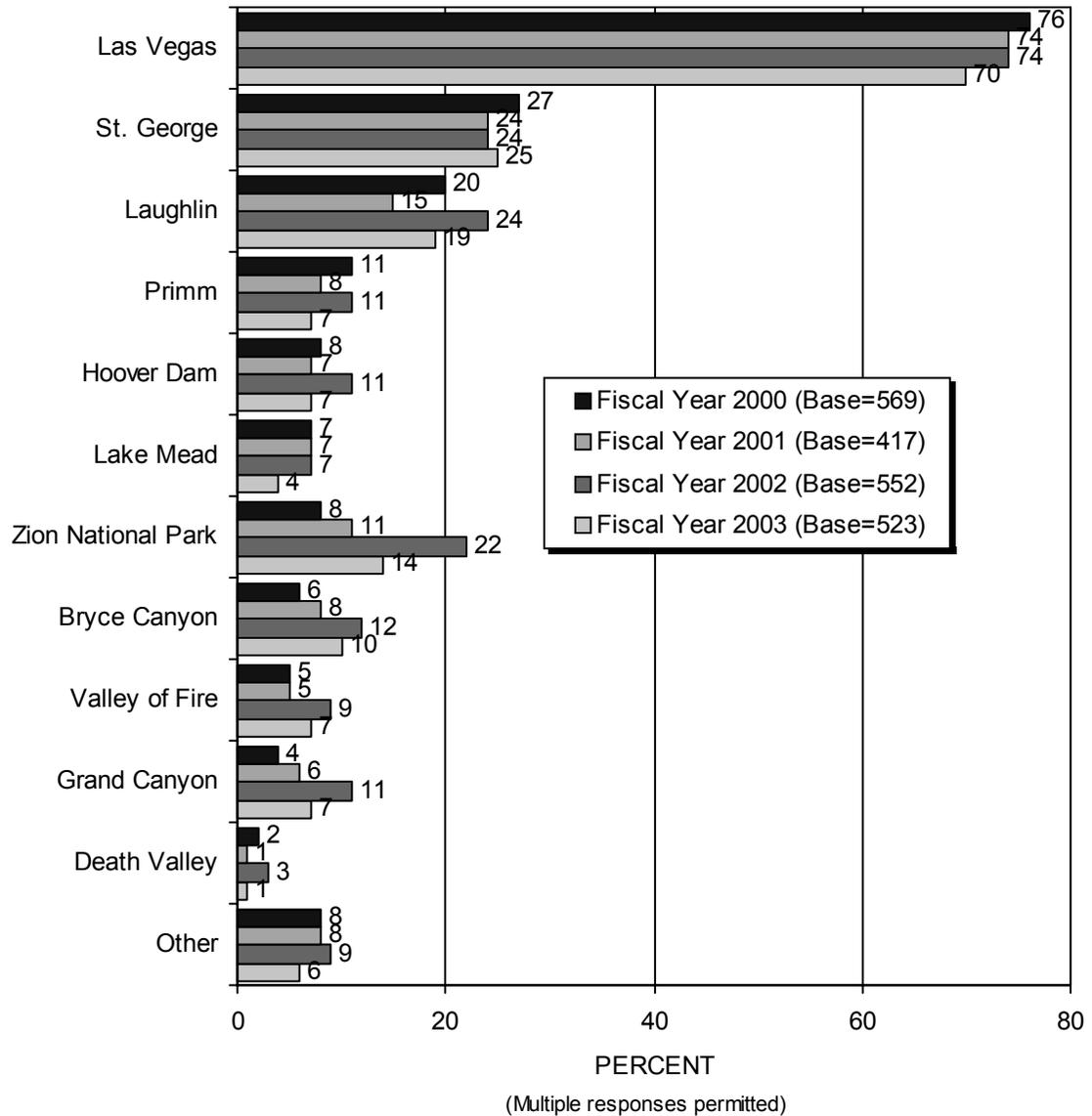
Two percent (2%) of all Mesquite visitors were assisted in their travel planning by a travel agent in 2003, relatively unchanged for the past four years (Figure 18).

FIGURE 19
Touring Other Areas



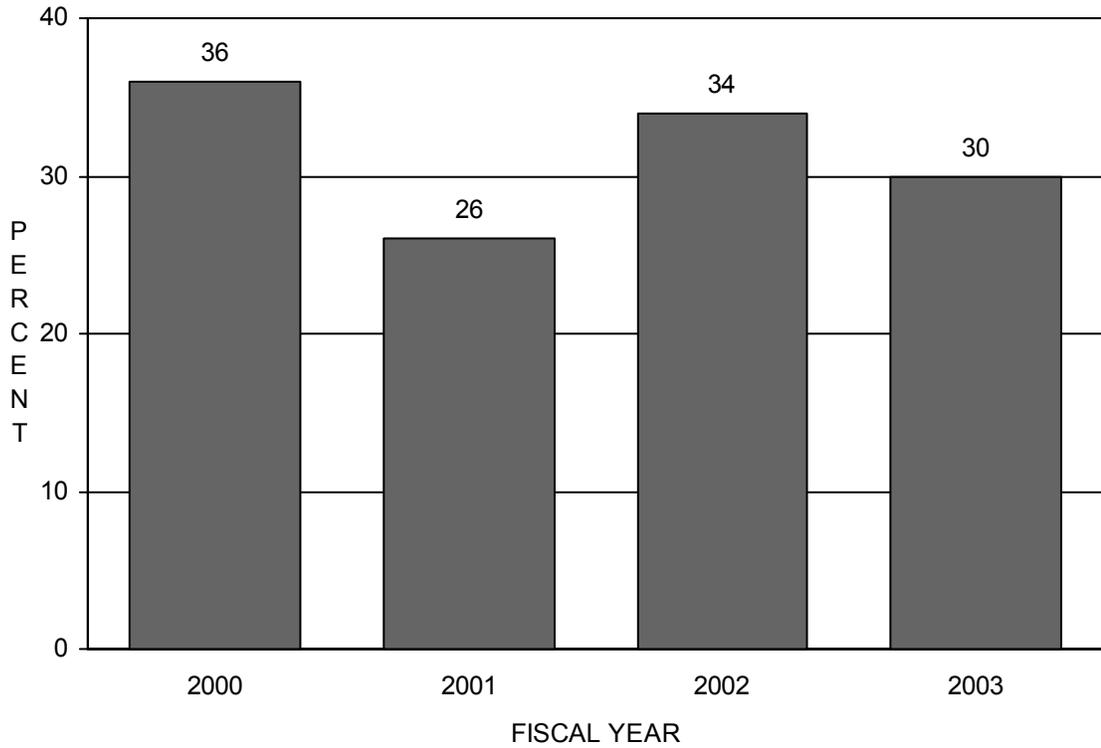
We asked visitors if they had visited, or planned to visit, other areas of Nevada and nearby states (Figure 19), and 44% said yes, about the same as in 2002 and 2000 but significantly more than the low of 35% in 2001.

FIGURE 20
Other Places Visited
(Among Those Who Visited Nearby Places)



Among those who said they visited nearby areas, 70% visited Las Vegas, down from 76% in 2000. One-quarter (25%) visited St. George. Nineteen percent (19%) visited Laughlin, down from 24% in 2002. Fourteen percent (14%) visited Zion National Park, down from 22% last year. Seven percent (7%) each visited Hoover Dam, Primm, and the Grand Canyon, down from 11% for each last year. Another 7% visited the Valley of Fire (Figure 20).

FIGURE 21
Proportion Of All Mesquite Visitors
Who Visited Las Vegas



Among *all* Mesquite visitors, 30% said they also visited, or planned to visit, Las Vegas on their current trip, down slightly from 34% last year and down significantly from 36% in 2000, but significantly higher than 26% in 2001 (Figure 21).

TRIP CHARACTERISTICS AND EXPENDITURES

We asked visitors how many adults (21 years old or older), including themselves, were in their immediate party (Figure 22). Sixty-nine percent (69%) of Mesquite visitors reported two adults in their immediate party, up significantly from 62% in 2000 and 65% in 2001, and also up slightly from 66% in 2002. The proportion of visitors with four adults in their immediate party remained at 8%, down significantly from 12% three years ago. The average party size was 2.2, about the same as last year, but down significantly from the average party sizes of 2.4 in 2000 and 2.3 in 2001.

FIGURE 22
Adults In Immediate Party

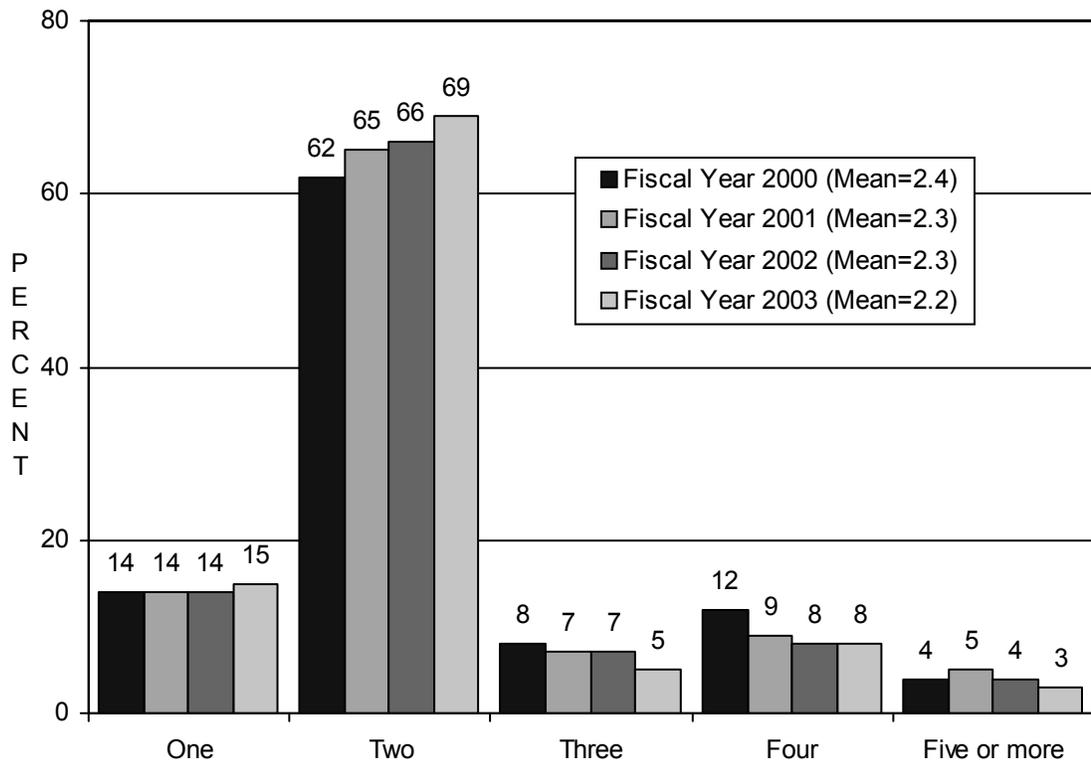
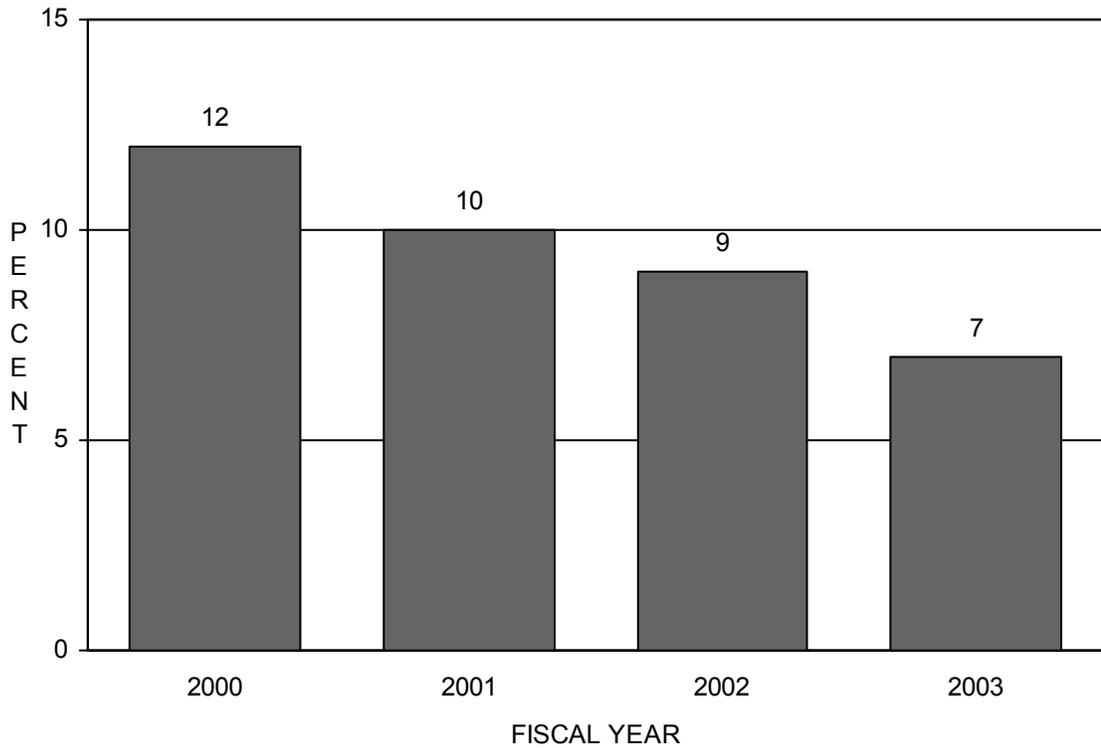


FIGURE 23
People In Party Under Age 21



The proportion of visitors who reported having people in their party under the age of 21 declined for the third consecutive year, and stands at 7% for 2003, down significantly from 12% in 2000, 10% in 2001, and 9% in 2002 (Figure 23).

FIGURE 24
Nights Stayed

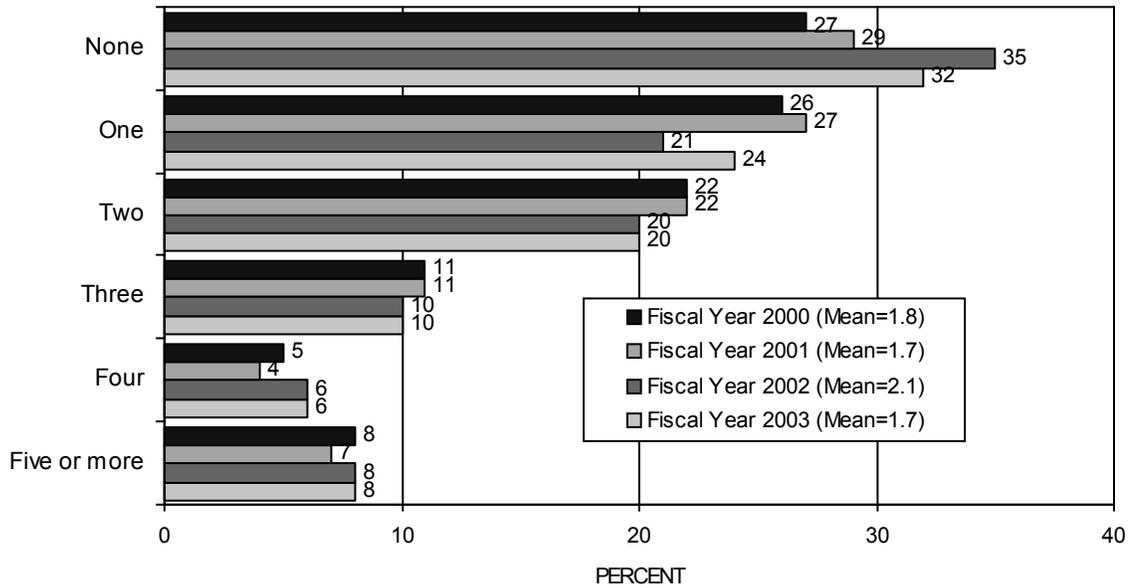
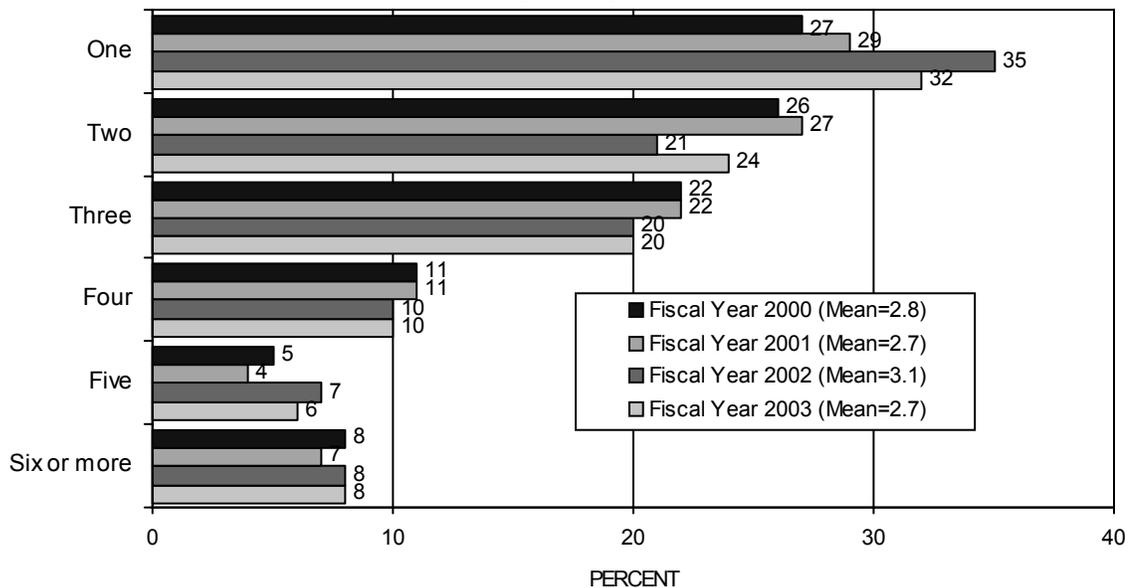
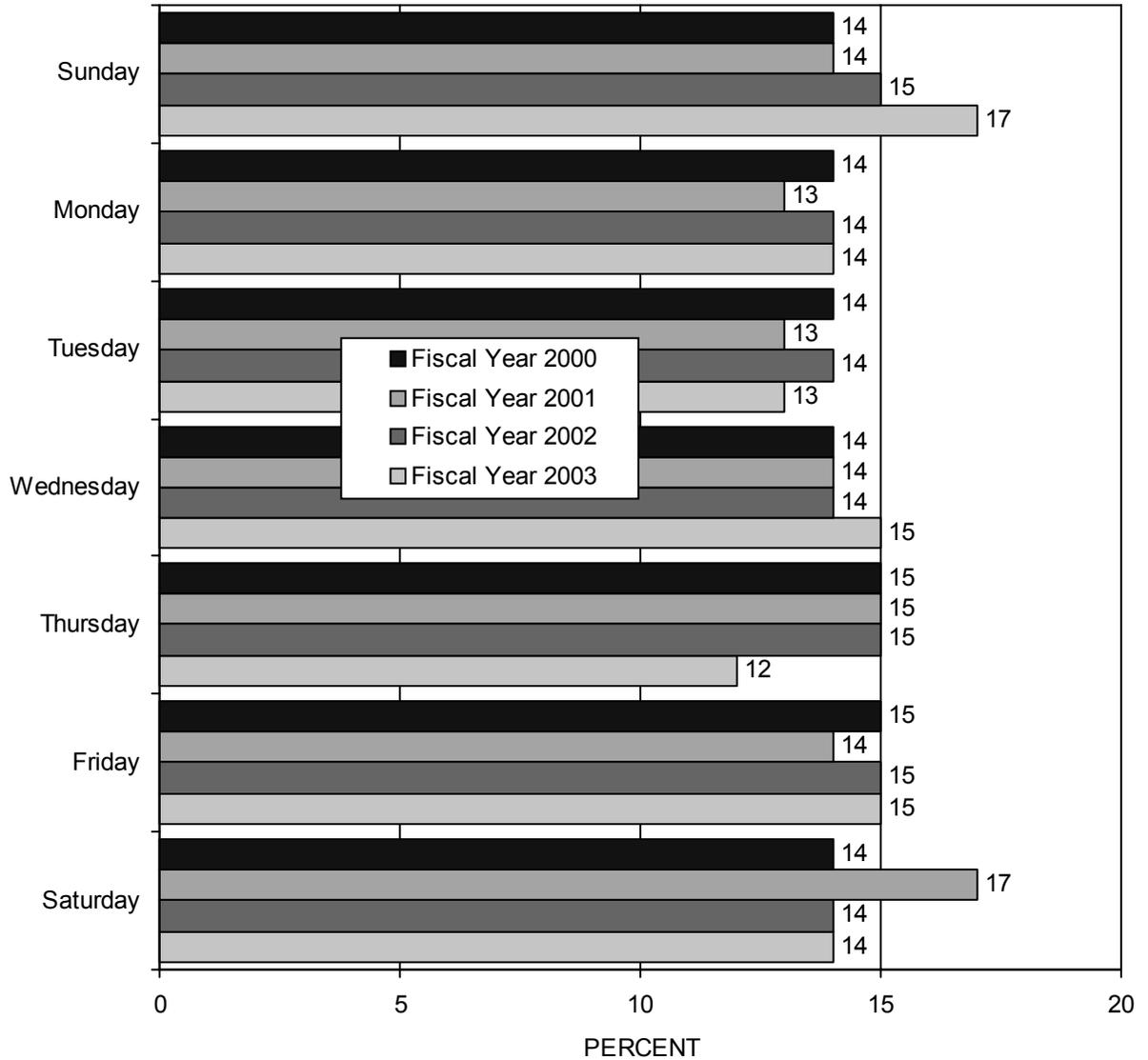


FIGURE 25
Days Stayed



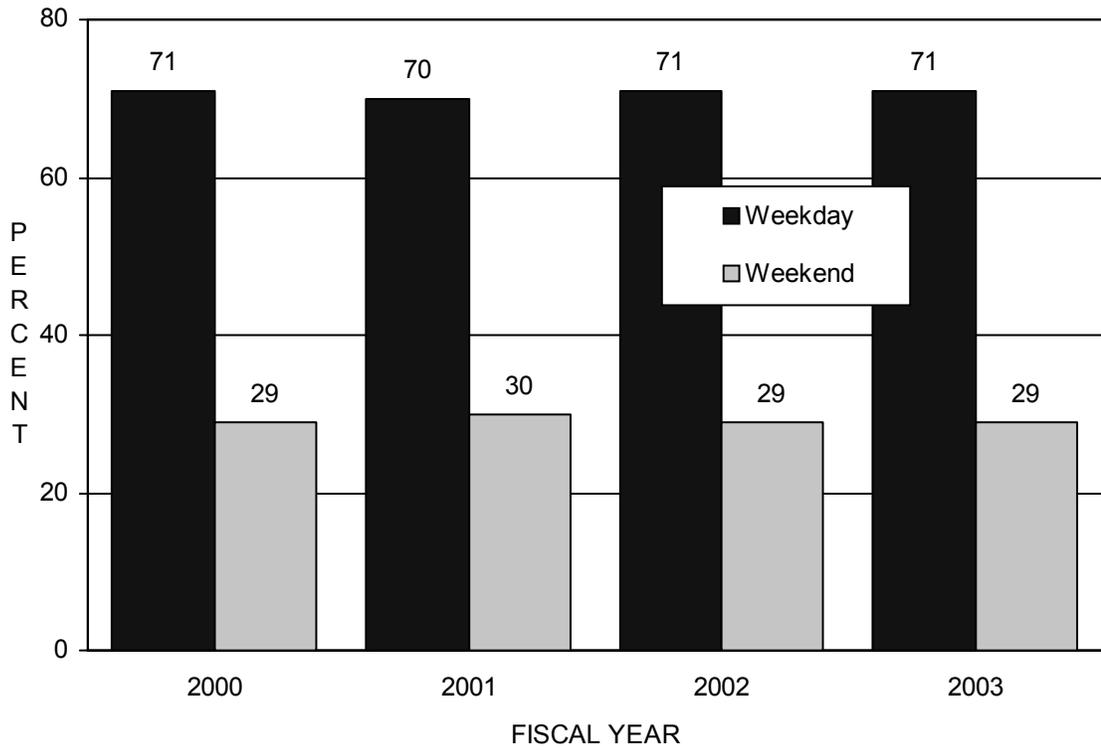
During 2002-2003, Mesquite visitors stayed an average of 1.7 nights and 2.7 days, down from last year's averages, but in line with years prior to last (Figures 24 and 25).

FIGURE 26
Day Of Arrival



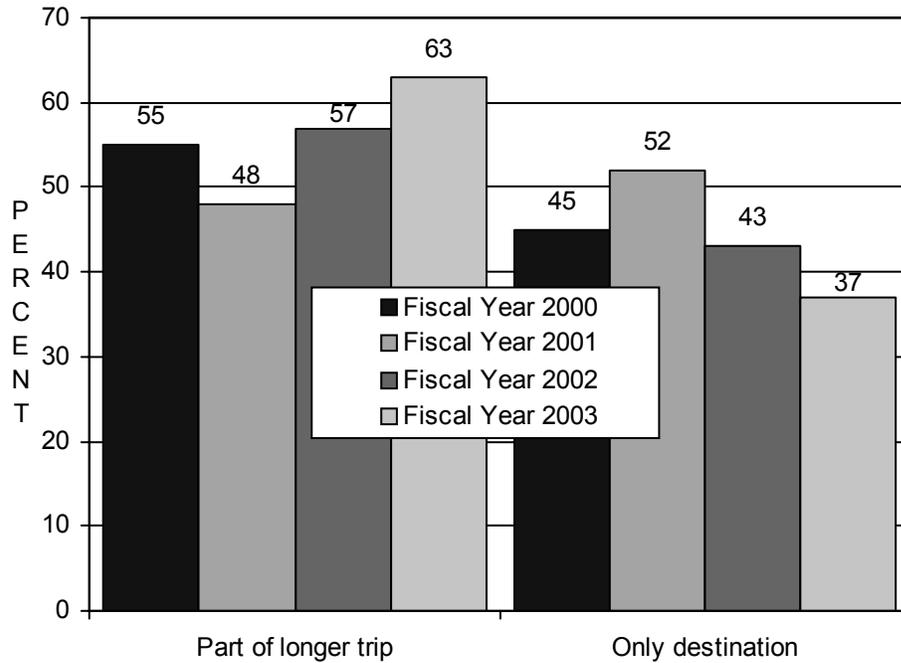
There was a slightly greater chance for visitors to arrive in Mesquite on Sunday (17%) than in past years, and a lesser chance they would arrive on Thursday (12%) (Figure 26). However, about equal proportions arrived on every other day of the week.

FIGURE 27
Weekend Versus Weekday Arrival



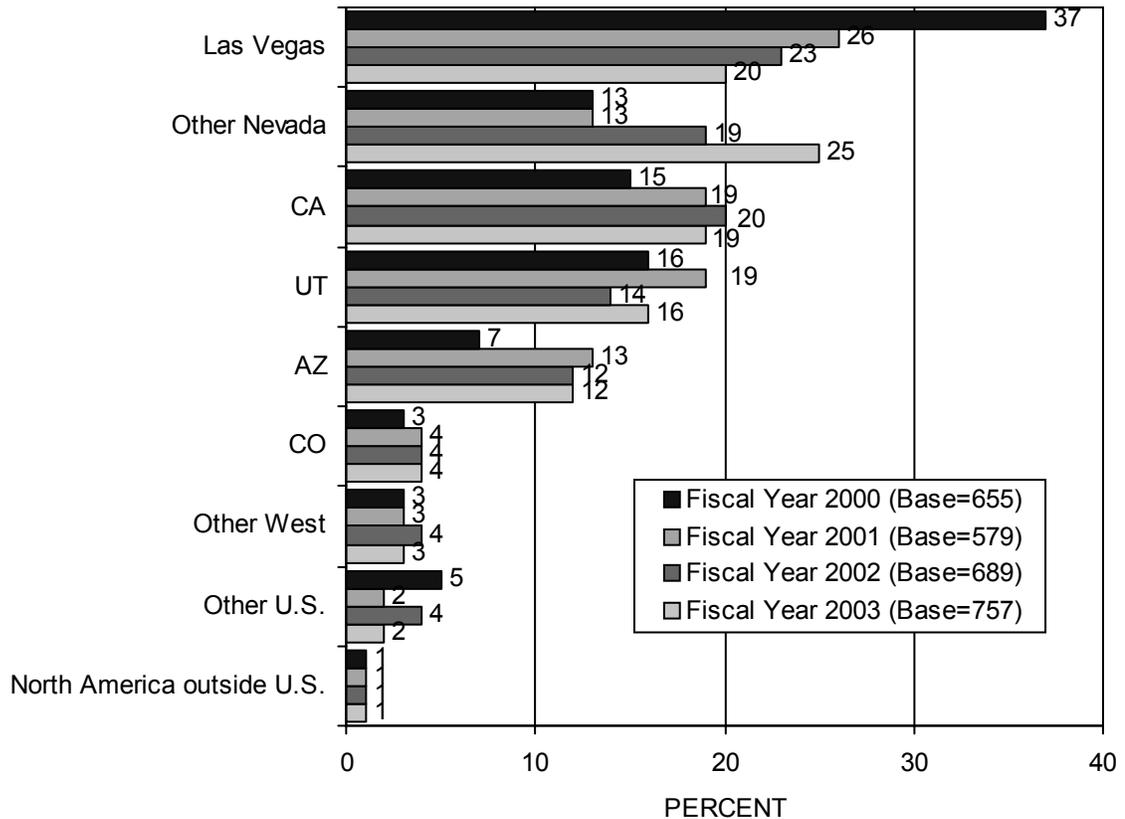
As in past years, seven in ten visitors (71%) arrived in Mesquite between Sunday and Thursday and three in ten (29%) arrived on Friday or Saturday (Figure 27).

FIGURE 28
Whether Mesquite Visit Is Part Of A Longer Trip



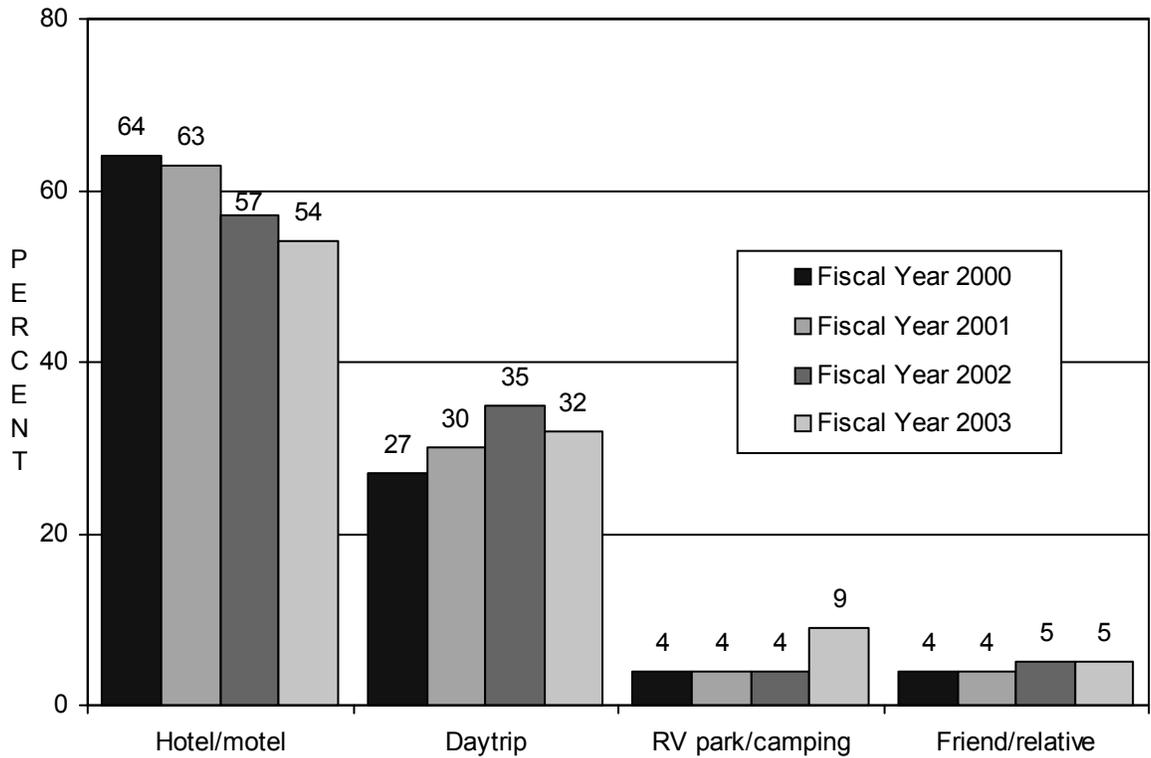
More than six in ten (63%) Mesquite visitors said their visit to Mesquite was part of a longer trip (Figure 28), up significantly over the past three years (55% in 2000, 48% in 2001, and 57% in 2002).

FIGURE 29
Primary Destination Of Trip
(Among Those Whose Primary Destination Is Not Mesquite)



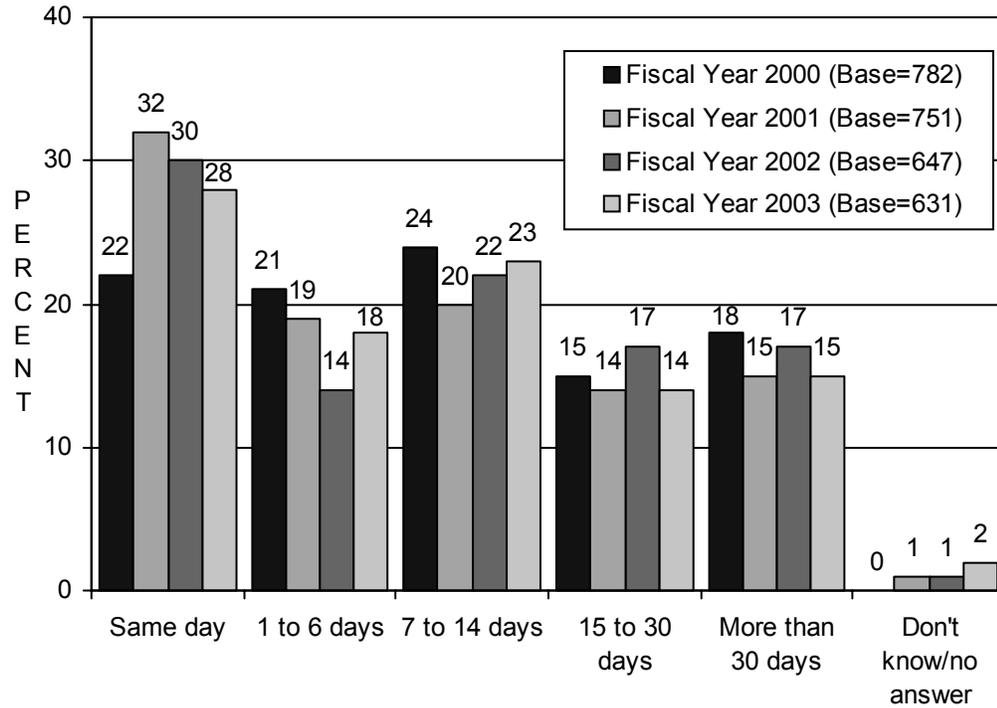
We asked visitors to name their primary destination if it was not Mesquite (Figure 29). One in five (20%) said Las Vegas, about the same as last year, but down significantly from 26% in 2001 and a high of 37% in 2000. One-quarter (25%) mentioned other destinations in Nevada, up significantly from 13% in both 2000 and 2001, and 19% in 2002. California was mentioned by 19%, followed by Utah (16%), Arizona (12%), Colorado (4%), other destinations in the Western U.S. (3%), other destinations in the U.S. outside the West (2%), and, finally, other North American destinations outside the U.S. (1%).

FIGURE 30
Where Lodged



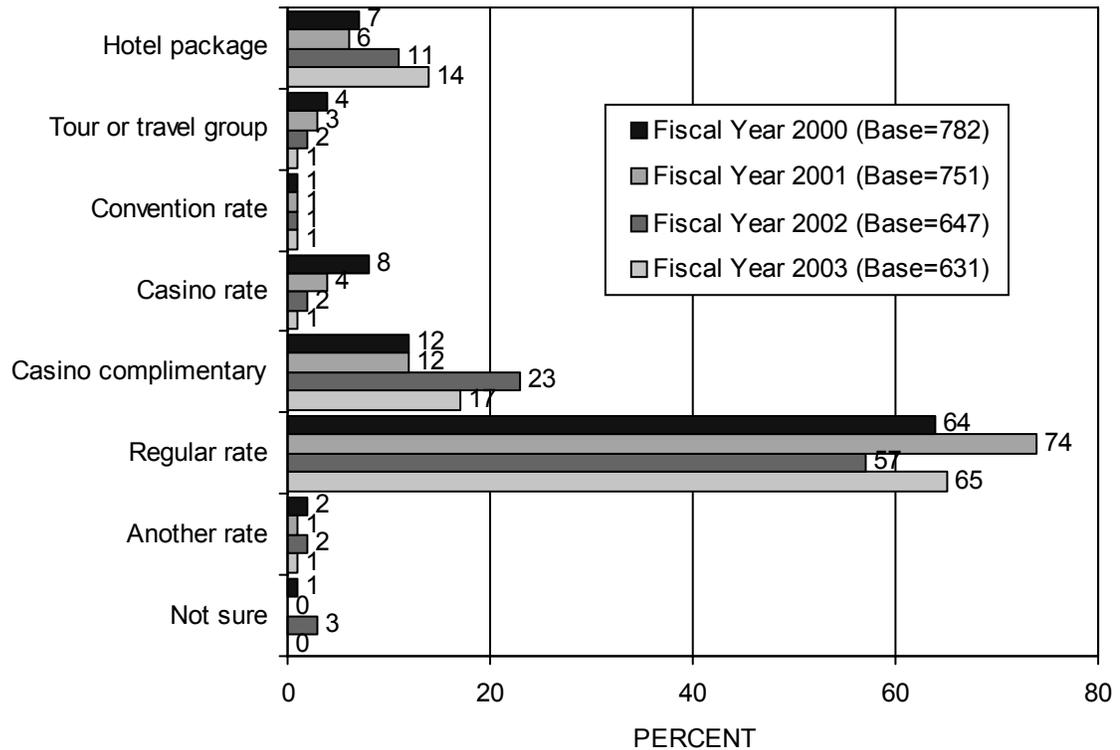
As shown in Figure 30, 54% of visitors stayed in hotels or motels, down significantly from 64% and 63% in 2000 and 2001 respectively. One-third (32%) were visiting Mesquite for the day, about the same as in the past two years but significantly higher than in 2000 (27%). Nine percent (9%) were in an RV or camping, up significantly from 4% each of the past three years. Five percent (5%) were staying with friends or relatives, consistent with past years.

FIGURE 31
How Far In Advance Accommodations Were Booked
(Among Those Staying In A Hotel Or Motel)



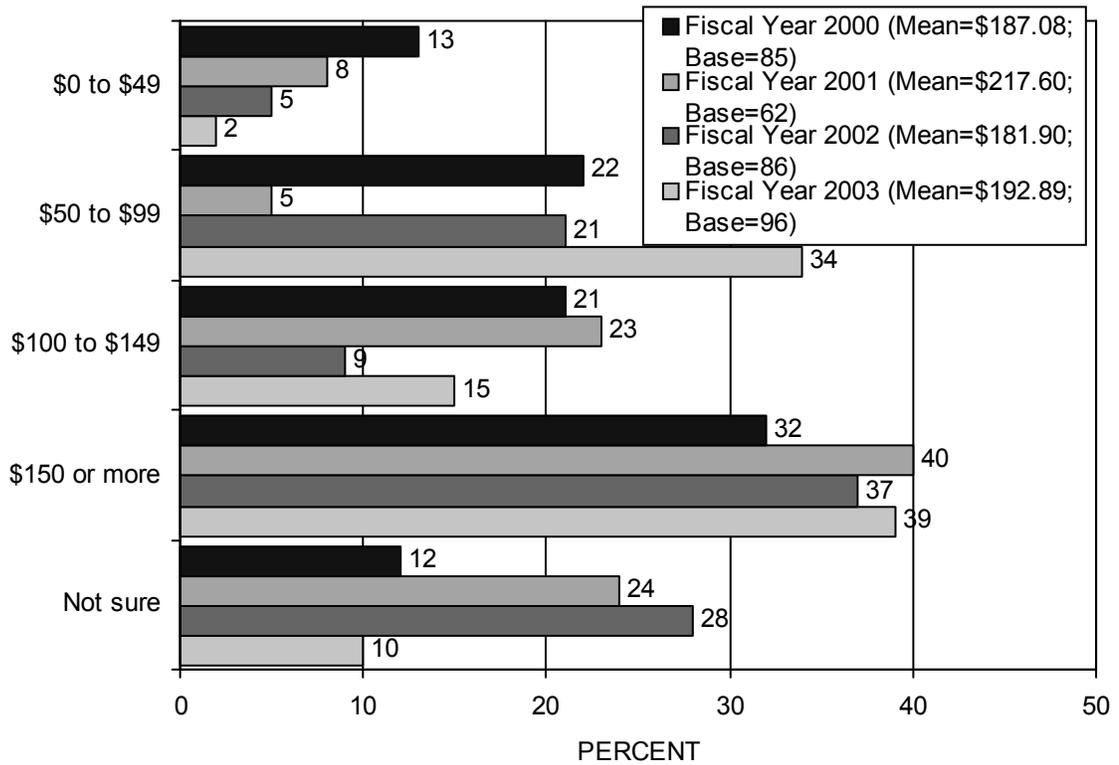
We asked those staying in a hotel, motel, or RV park how far in advance they had booked accommodations (Figure 31). Twenty-eight percent (28%) booked their accommodations on the day of their arrival, up from 22% in 2000. Eighteen percent (18%) of visitors booked one to six days in advance (up from 14% last year), 23% booked seven to 14 days in advance, 14% booked 15 to 30 days in advance, and 15% booked more than 30 days in advance.

FIGURE 32
Type Of Room Rate
(Among Those Staying In A Hotel Or Motel)



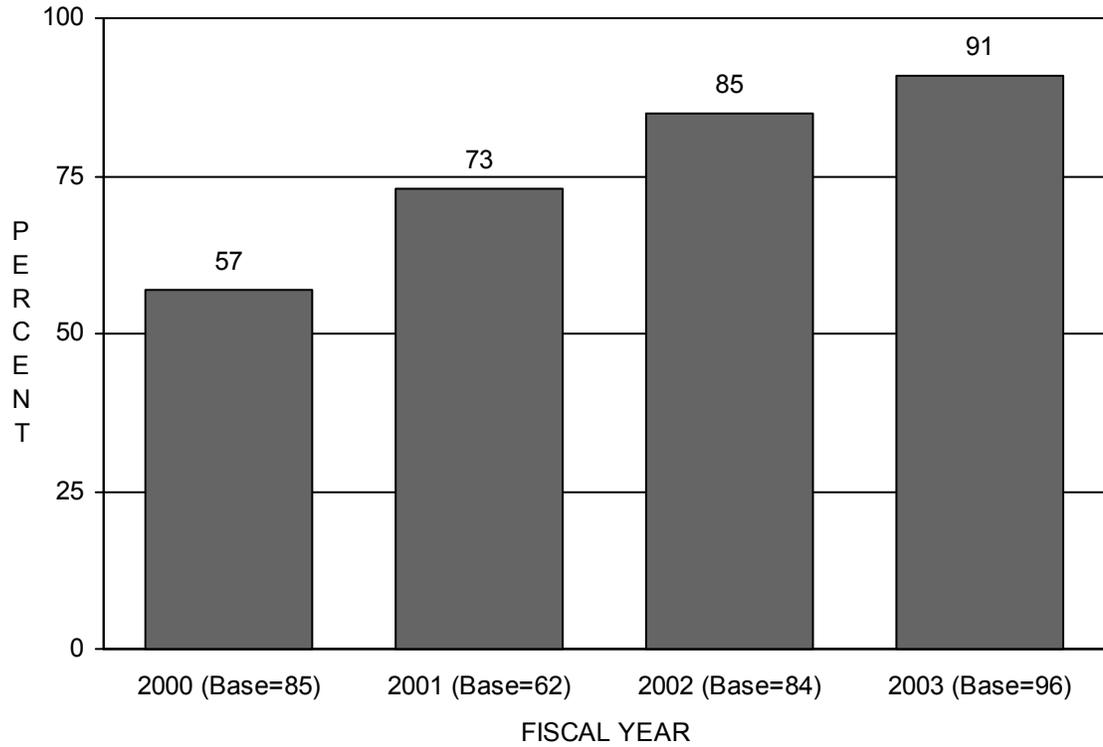
We asked those staying in a hotel or motel what type of room rate they had received for their accommodations (Figure 32). Two-thirds (65%) said they paid a regular room rate, up significantly from 57% last year but still lower than the high of 74% in 2001. Seventeen percent (17%) of lodgers received a casino complimentary rate, down from 23% last year but higher than the 12% each who received a complimentary rate in 2000 and 2001. Fifteen percent (15%) paid some type of group rate, with 14% saying it was a hotel/airline package rate (about the same as last year but up significantly from 7% in 2000 and 6% in 2001) and 1% saying it was a tour or travel group rate (down from a high of 4% in 2000). One percent (1%) received a special casino rate (down significantly from 8% in 2000 and 4% in 2001). Only 1% said they paid some other rate.

FIGURE 33
Cost Of Package — Per Person
(Among Those Who Bought A Package)



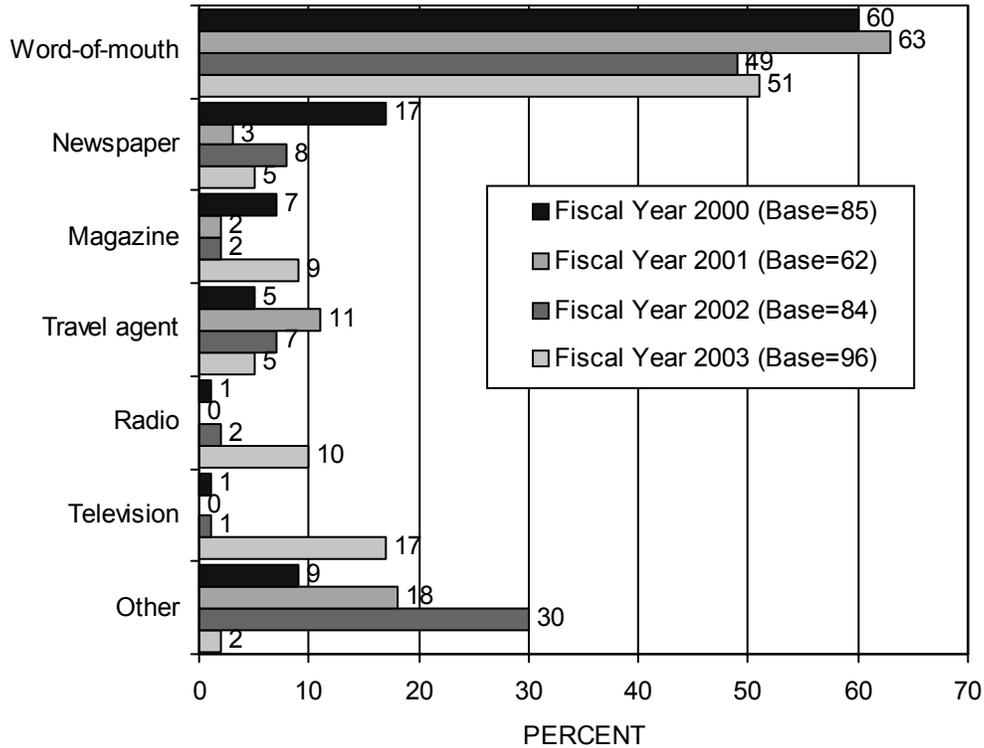
We asked for the package cost from visitors who had purchased a hotel, airline, or tour/travel group package (Figure 33). Two percent (2%) of these visitors paid less than \$50 for their package (down significantly from 13% in 2000), while 34% paid \$50-\$99 on their package deal (up significantly from 21% in 2002). Another 15% paid between \$100 and \$149 (down from 21% in 2000 and 23% in 2001), and 39% paid \$150 or more. Ten percent (10%) of visitors were not sure how much their package cost, down from 28% last year. The average per-person package cost was \$192.89, not significantly different from prior readings.

FIGURE 34
Package Purchased Directly From A Hotel
(Among Those Who Bought A Package)



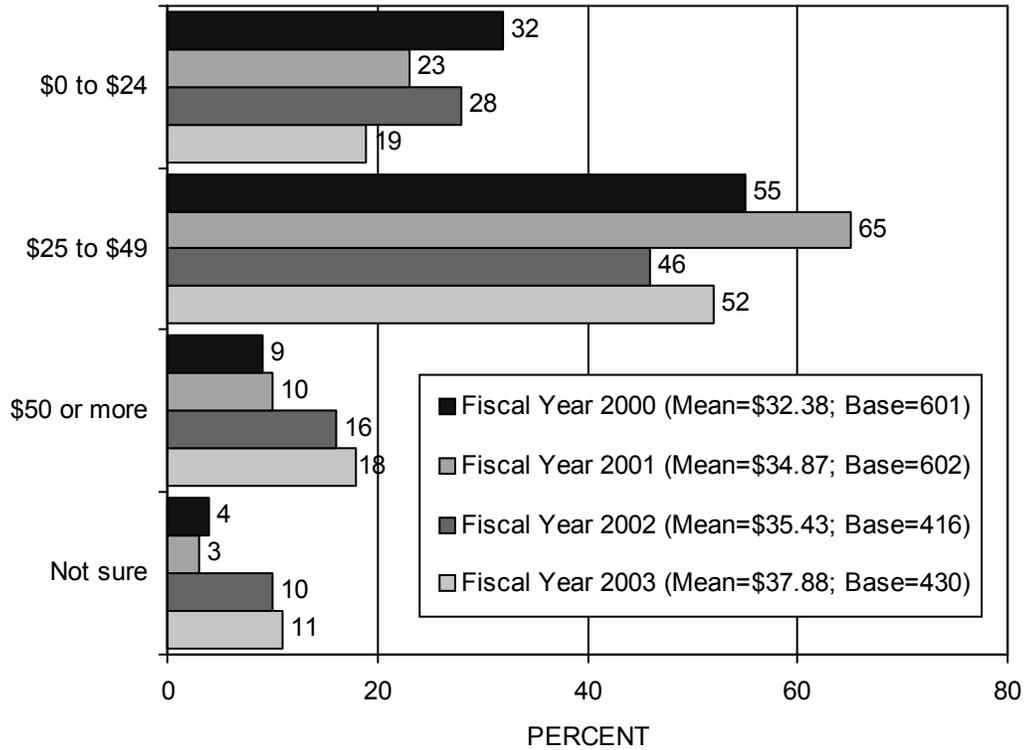
We asked visitors who purchased a package if they had purchased it directly from the hotel, and the vast majority (91%) said yes (Figure 34). This is up significantly from the proportion of package visitors who purchased a package directly from a hotel in 2000 (57%) and 2001 (73%).

FIGURE 35
Where First Heard About The Package
(Among Those Who Bought A Package)



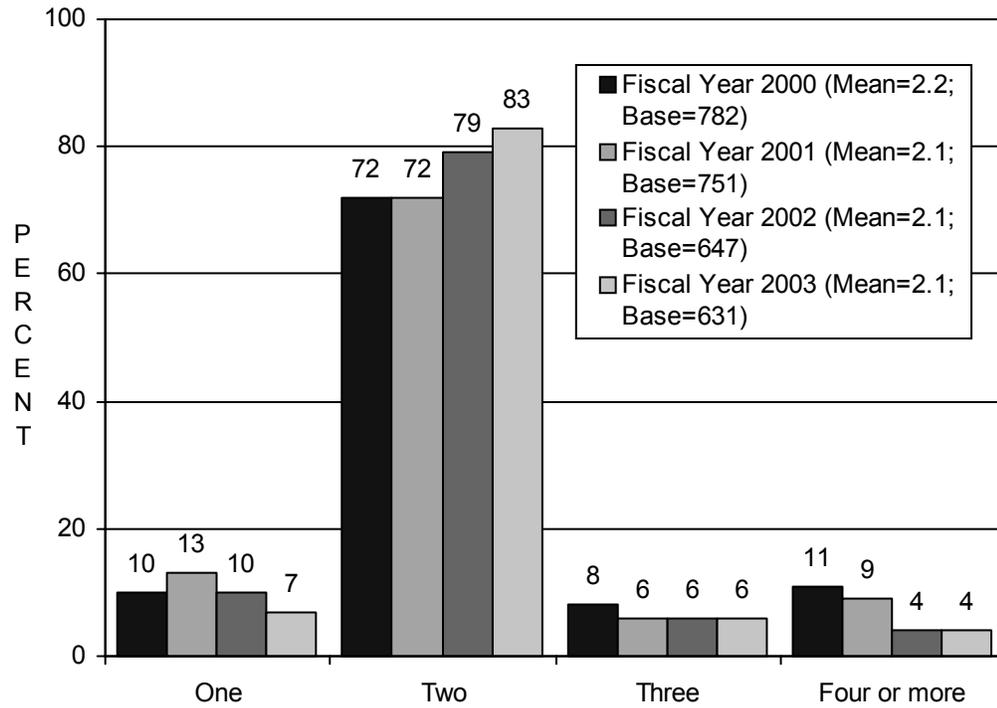
Most package purchasers (51%) said they first heard about the package from friends, co-workers, or relatives (word-of-mouth). The number of package purchasers who said they first learned about their package through a television (17%) or radio advertisement (10%) was up significantly from past years. Nine percent (9%) heard about their package through a magazine, also up significantly from 2% in the past two years. Five percent (5%) said they first learned about it through a newspaper ad (down from the high of 17% in 2000), and another 5% said they first heard about it through a travel agent (Figure 35).

FIGURE 36
Lodging Expenditures — Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package)



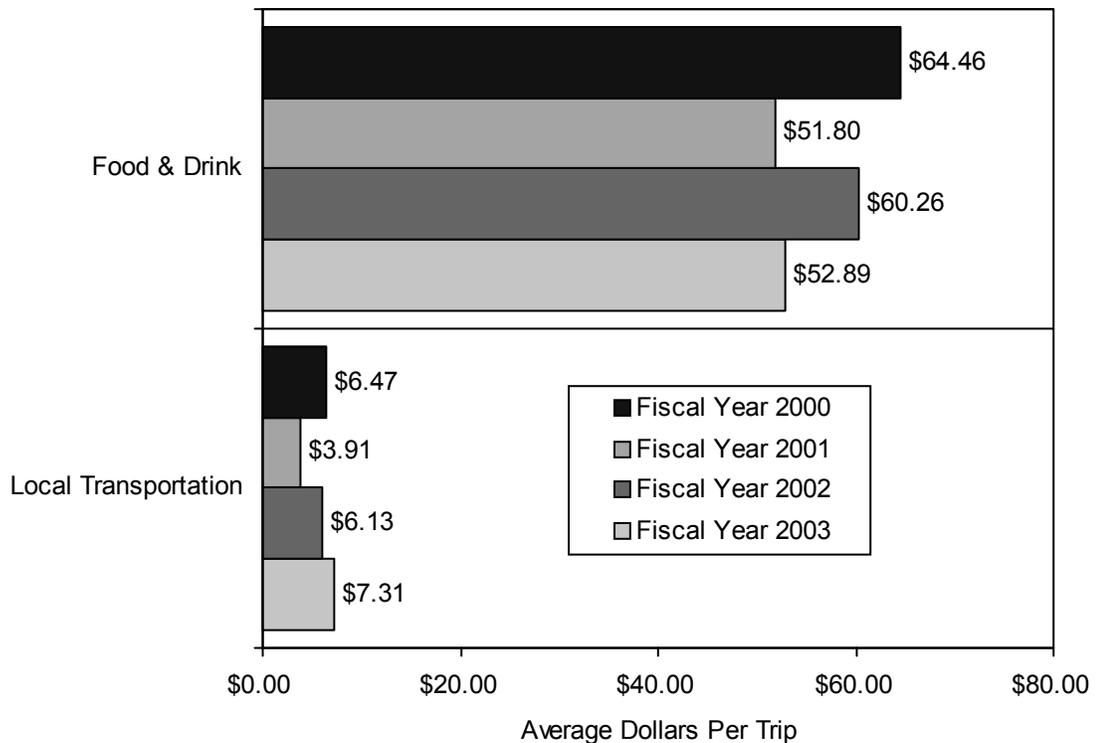
Nineteen percent (19%) said the average per-night cost of their hotel or motel room (non-package) was under \$25, down significantly from 28% last year and 32% in 2000 (Figure 36). About one-half of visitors (52%) reported spending between \$25 and \$49 per night on their room, up slightly from 46% last year, but significantly lower than the high of 65% recorded in 2001. Another 18% spent \$50 or more, about the same as last year, but up from 9% in 2000 and 10% in 2001. The mean (average) expenditure was \$37.88, up slightly from the average of \$35.43 last year, and significantly greater than the figures of \$32.38 in 2000 and \$34.87 in 2001.

FIGURE 37
Number Of Room Occupants
(Among Those Staying In A Hotel Or Motel)



As Figure 37 shows, most Mesquite visitors (83%) reported two room occupants, up significantly from 72% in 2000 and 2001, and also up slightly from last year (79%). The average (mean) number of room occupants was 2.1.

FIGURE 38
Average Trip Expenditures On Food & Drink —
And Local Transportation¹
(Including Visitors Who Spent Nothing In That Category)



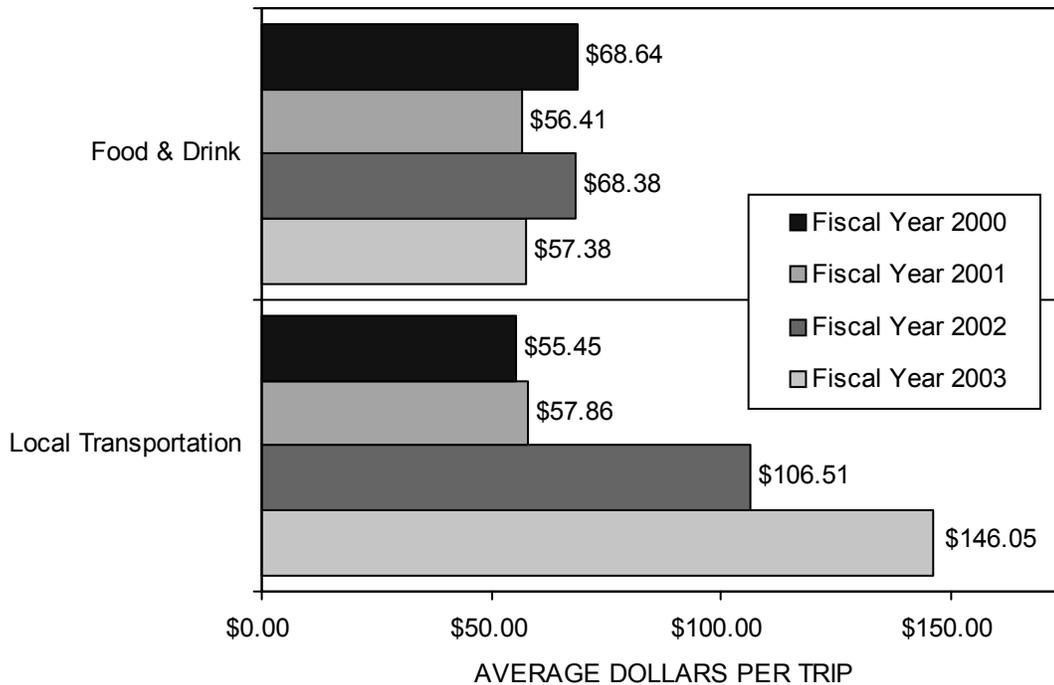
We asked all visitors about their daily expenditures on food and drink and on local transportation.

Figure 38 shows the average trip expenditures *including visitors who said they spent nothing in that category*. In the current study, the average food and drink expenditure was \$52.89, down slightly from last year (\$60.26), and down significantly from the high of \$64.46 reported in 2000.

The average local transportation expenditure was \$7.31, up significantly from the figure of \$3.91 reported in 2001.

¹ Trip expenditures are calculated by multiplying respondents' estimated daily expenditures by the number of days they had spent in Mesquite on their most recent trip.

FIGURE 39
Average Trip Expenditures On Food & Drink —
And Local Transportation
(Among Those Who Spent Money In That Category¹)

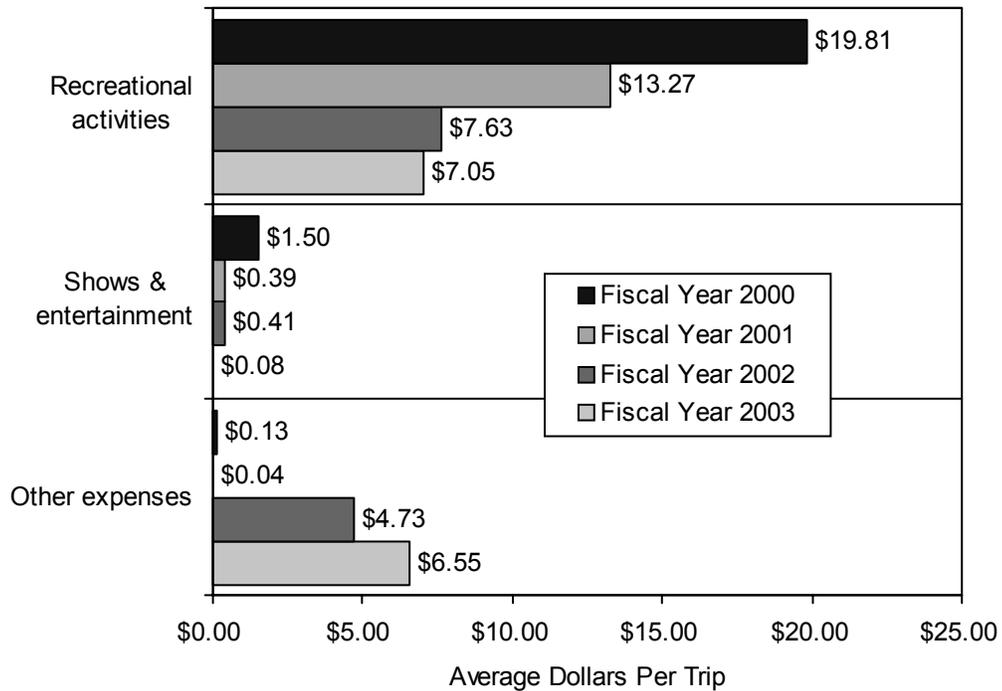


Among visitors who indicated they spent money in these categories, average food and drink expenditures in the current study were \$57.38, down significantly from \$68.38 per trip in 2002 and \$68.64 in 2000. Average local transportation expenditures were \$146.05, up significantly from the past three years (\$55.45 in 2000, \$57.86 in 2001, and \$106.51 in 2002) (Figure 39).

¹ Percentages of respondents who spent money in each category are shown in the following table:

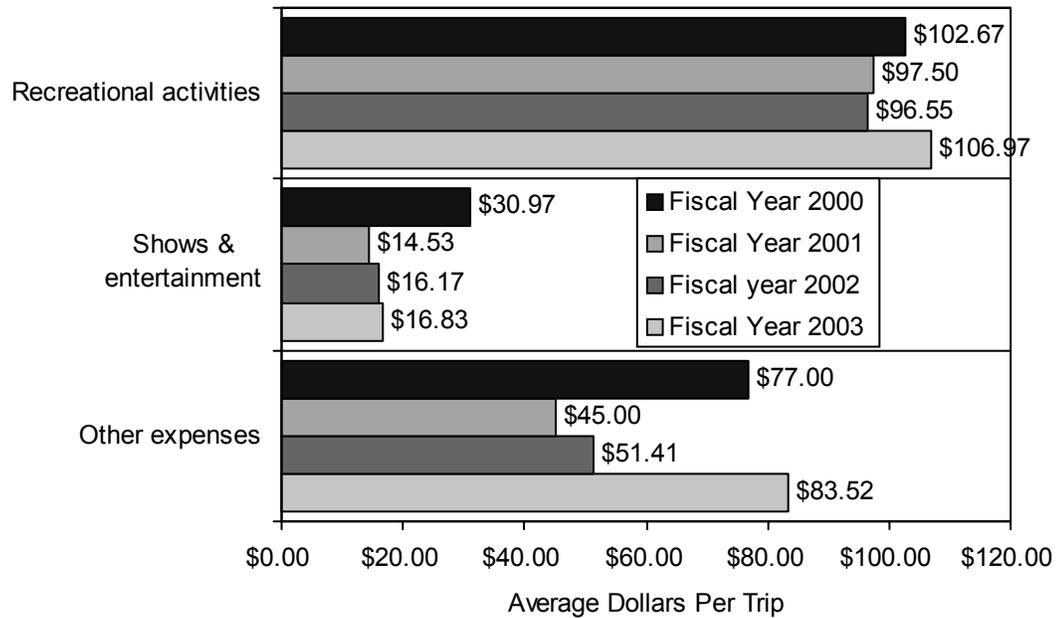
	Fiscal Year 2000	Fiscal Year 2001	Fiscal Year 2002	Fiscal Year 2003
<u>Food and Drink</u>				
Base size	(1127)	(1103)	(1058)	(1094)
Proportion of total	94%	92%	88%	91%
<u>Local Transportation</u>				
Base size	(141)	(82)	(71)	(60)
Proportion of total	12%	7%	6%	5%

FIGURE 40
 Average Trip Expenditures On Recreational Activities,
 Shows And Entertainment, And Other Expenses
 (Including Visitors Who Spent Nothing In That Category)



We asked all visitors about the amount of money they spent on recreational activities, shows and entertainment, and other expenses during their visit to Mesquite. Figure 40 shows these average expenditures *including visitors who said they spent nothing in each category*. The average total spent on recreational activities this year was \$7.05, about the same as last year but down from \$13.27 in 2001 and \$19.81 in 2000. The average total spent on shows was \$0.08 per trip, the lowest average amount spent on this item in the past four years. The average amount spent on other expenses was \$6.55, up significantly from \$0.13 in 2000 and \$0.04 in 2001.

FIGURE 41
Average Trip Expenditures On Recreational Activities,
Shows And Entertainment, And Other Expenses
(Among Those Who Spent Money In That Category¹)



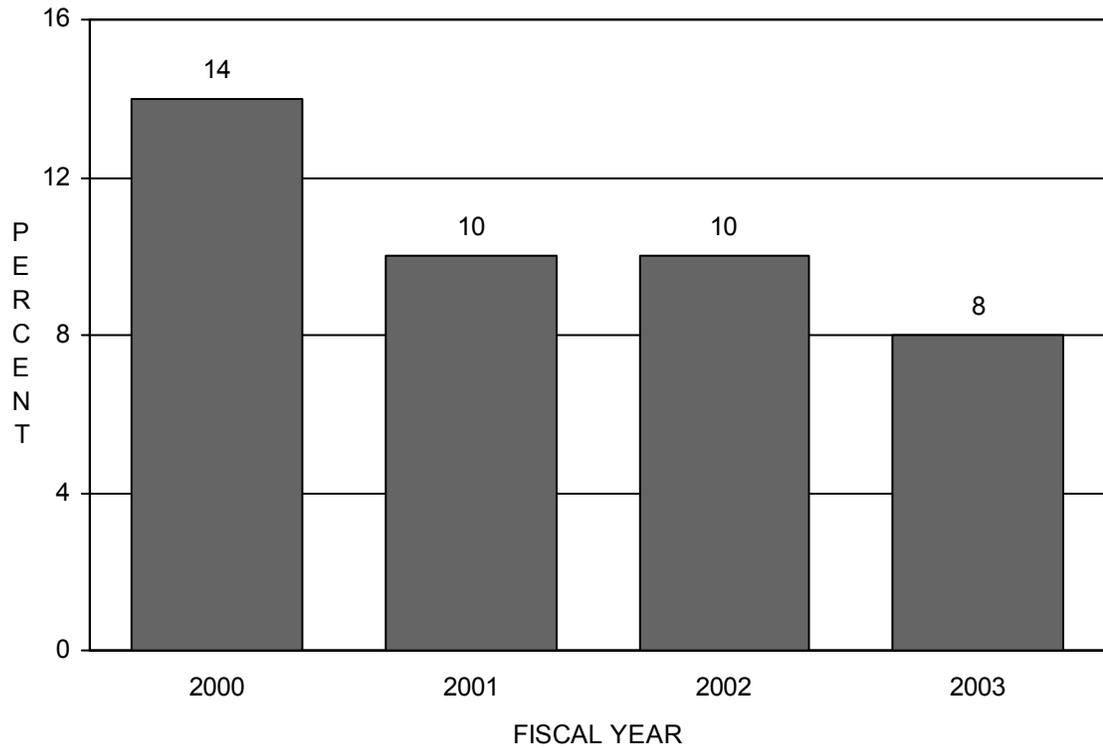
Considering only visitors who spent money in that category, the average total expenditure for recreational activities in 2003 was \$106.97. The average total spent on shows was \$16.83. Visitors spent an average of \$83.52 on other expenses, up significantly over last year (\$51.41) (Figure 41).

¹ Percentages of respondents who spent money in each category are shown in the following table:

	Fiscal Year 2000	Fiscal Year 2001	Fiscal Year 2002	Fiscal Year 2003
<u>Recreation</u>				
Base size	(242)	(194)	(104)	(79)
Proportion of total	20%	16%	9%	7%
<u>Shows</u>				
Base size	(60)	(32)	(35)	(6)*
Proportion of total	5%	3%	3%	1%
<u>Other</u>				
Base size*	(2)*	(1)*	(114)	(94)
Proportion of total	0%	0%	10%	8%

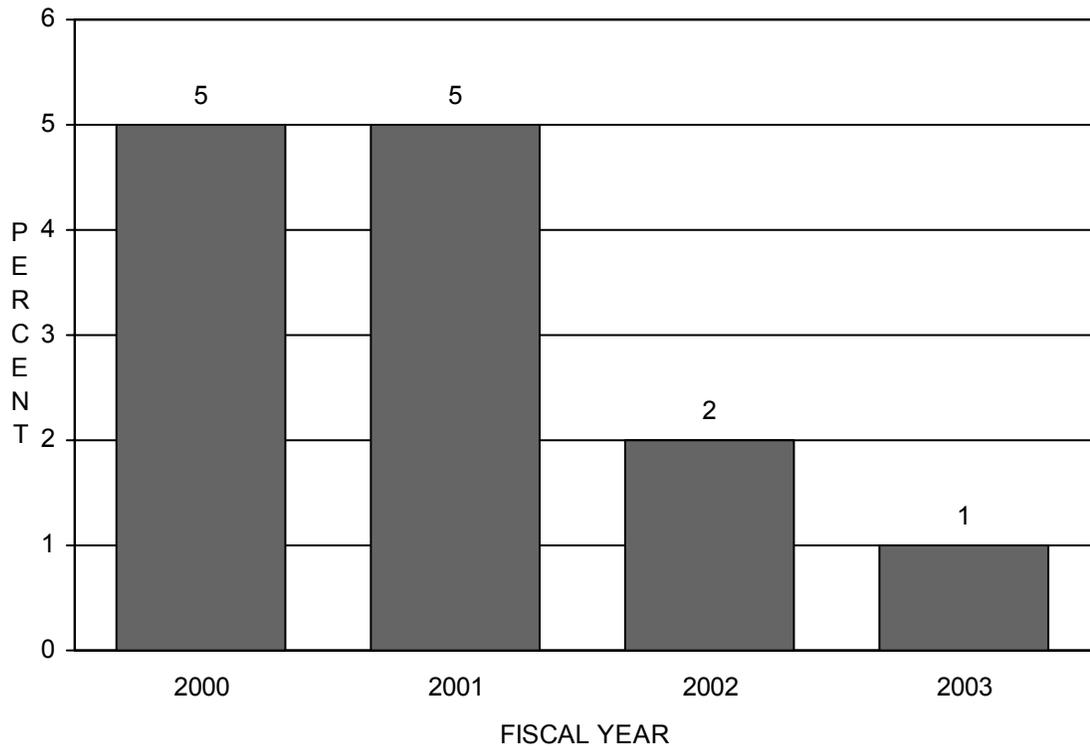
* Note extremely small base size

FIGURE 42
Whether Played Golf While Visiting Mesquite



Eight percent (8%) of Mesquite visitors said they played golf while visiting Mesquite (Figure 42), down significantly from the high of 14% recorded in 2000, and 10% each in 2001 and 2002.

FIGURE 43
Whether Stopped By The Mesquite Visitors Center



Only 1% of visitors said they stopped by the Mesquite Visitors Center while in Mesquite (Figure 43), down significantly from each of the past three years.

GAMING BEHAVIOR AND BUDGETS

Eighty-six percent (86%) of visitors gambled while in Mesquite – up significantly from 83% last year but still lower than the figures of 90% recorded in 2000 and 89% in 2001 (Figure 44).

FIGURE 44
Whether Gambled While in Mesquite

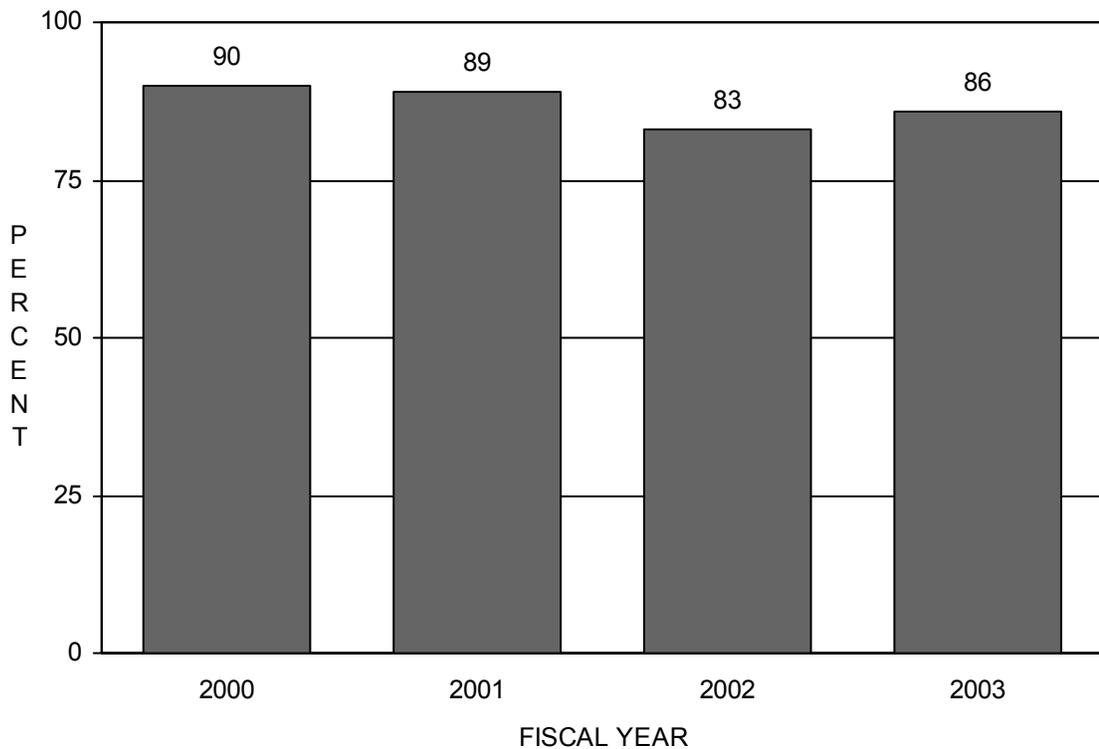
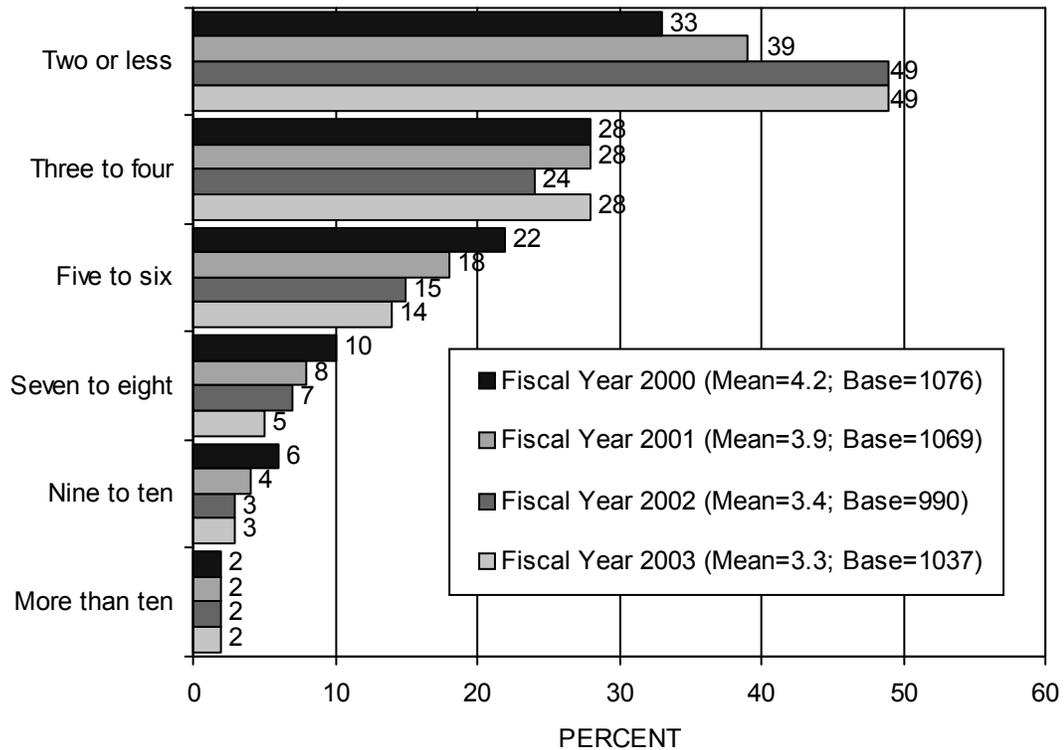
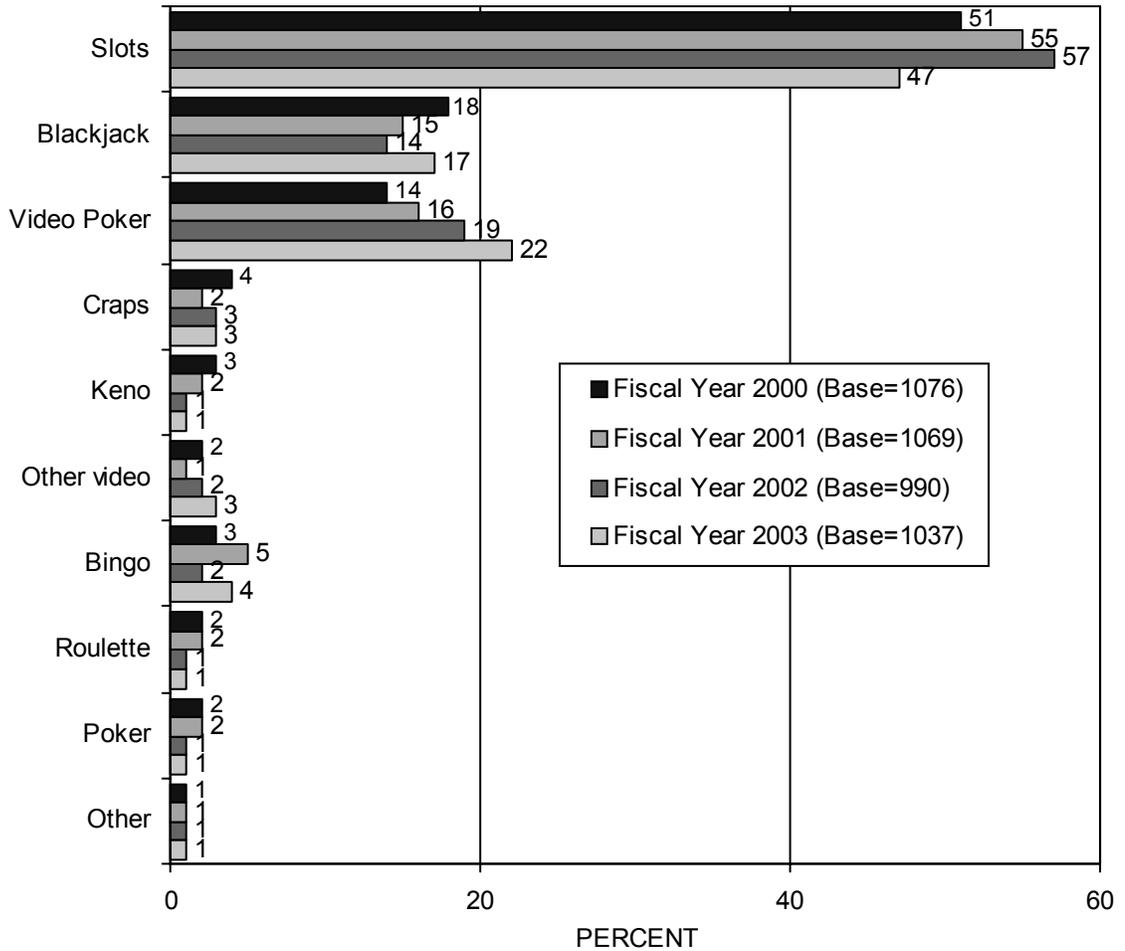


FIGURE 45
Hours Of Gambling — Average Per Day
(Among Those Who Gambled)



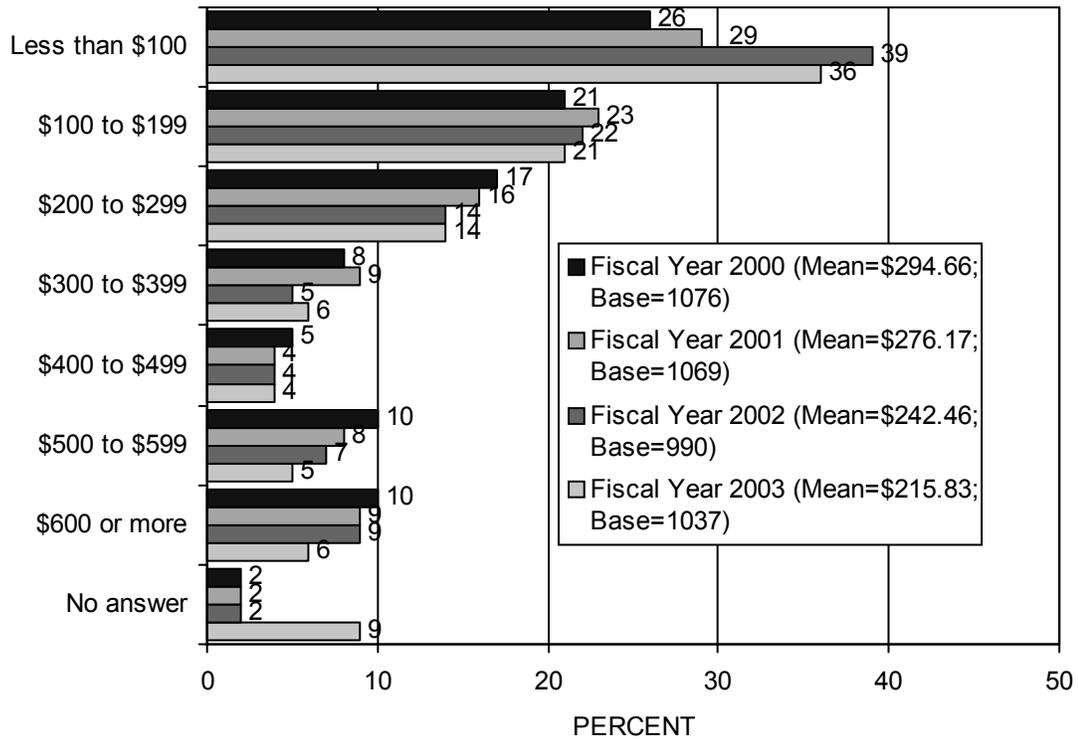
Among those who gambled while in Mesquite, most (49%) spent two hours or less gambling daily (Figure 45), identical to last year, and up significantly over 33% in 2000 and 39% in 2001. The proportion who spent three to four hours per day gambling rose from 24% last year to 28%. The mean (average) number of hours spent gambling was 3.3, about the same as last year, but down significantly from 3.9 in 2001 and 4.2 in 2000.

FIGURE 46
 Casino Game Played Most Often
 (Among Those Who Gambled)



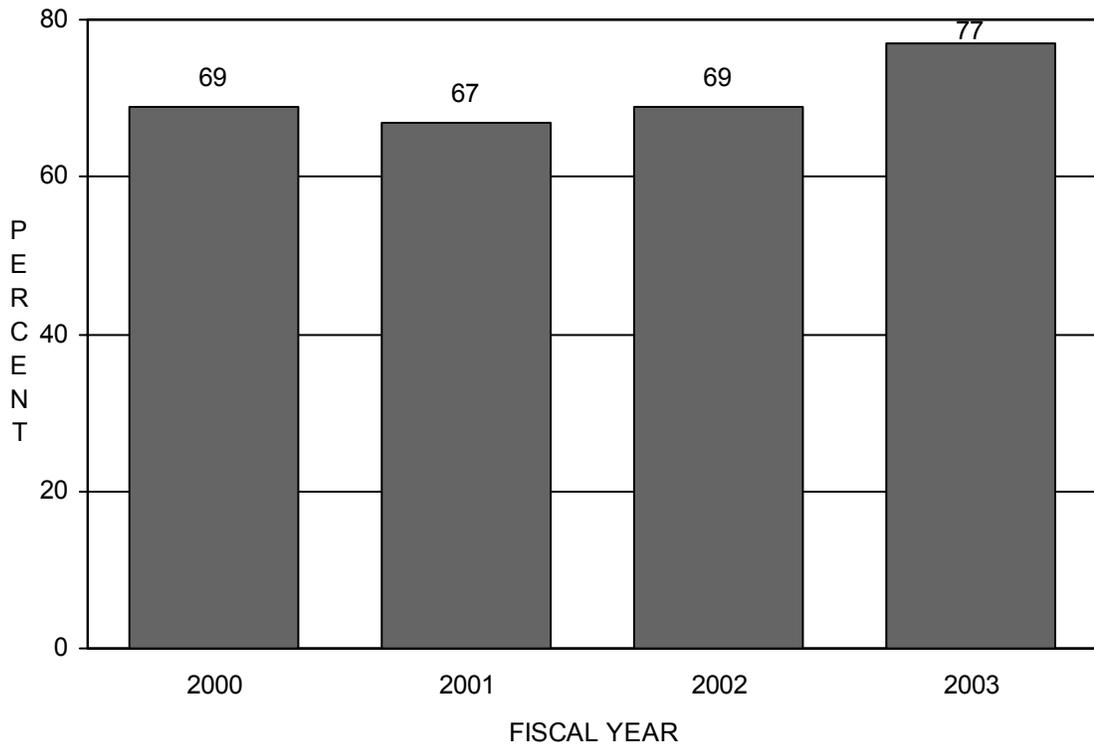
As Figure 46 shows, 47% of gamblers in 2003 played slot machines most often (down significantly from 55% in 2001 and 57% in 2002), followed by video poker machines (22%, up from 14% in 2000 and 16% in 2001), and blackjack (17%, up from 14% last year). Players of bingo (4%) were up significantly from last year (2%), while players of craps (3%), and other video machines (3%) were about the same as in past years.

FIGURE 47
Trip Gambling Budget
(Among Those Who Gambled)



The average trip gambling budget in 2003 was \$215.83, down significantly from the high of \$294.66 recorded in 2000 and also from the figure of \$276.17 recorded in 2001 (Figure 47). Thirty-six percent (36%) of gamblers said they budgeted less than \$100 per day, about the same as last year, but up significantly from 26% in 2000 and 29% in 2001. At the same time, the proportion of gamblers who said they budgeted \$500 or more was 11%, down significantly from the number who said they budgeted this much in 2000 (20%), 2001, (17%), or 2002 (16%).

FIGURE 48
Gambling Outside Mesquite



Over three-quarters (77%) of visitors said they had gambled outside Mesquite in the past year (Figure 48), a significant increase over 67% in 2001 and 69% in both 2000 and 2002.

ATTITUDINAL INFORMATION

Virtually all (99%) visitors gave Mesquite a high satisfaction rating. In fact, 94% of visitors were “very” satisfied with their visit to Mesquite in the 2003 survey, a significant increase from 91% each in 2000 and 2001, and 89% in 2002. Five percent (5%) were “somewhat” satisfied (Figure 49).

FIGURE 49
Satisfaction With Visit

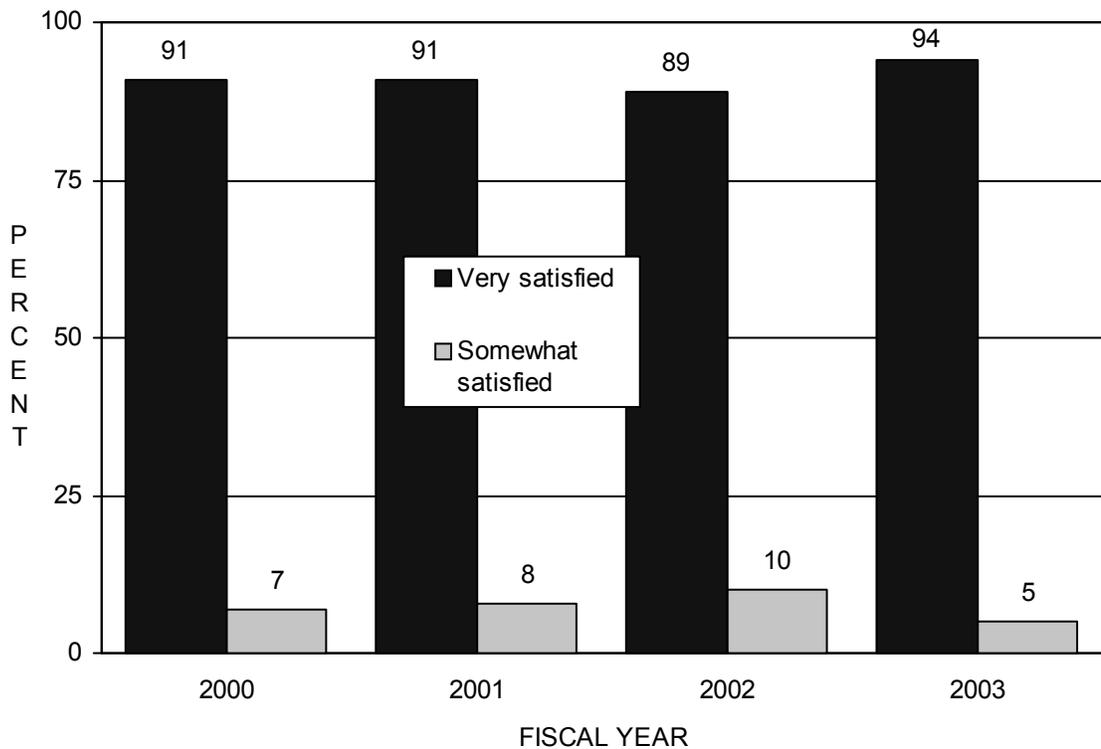
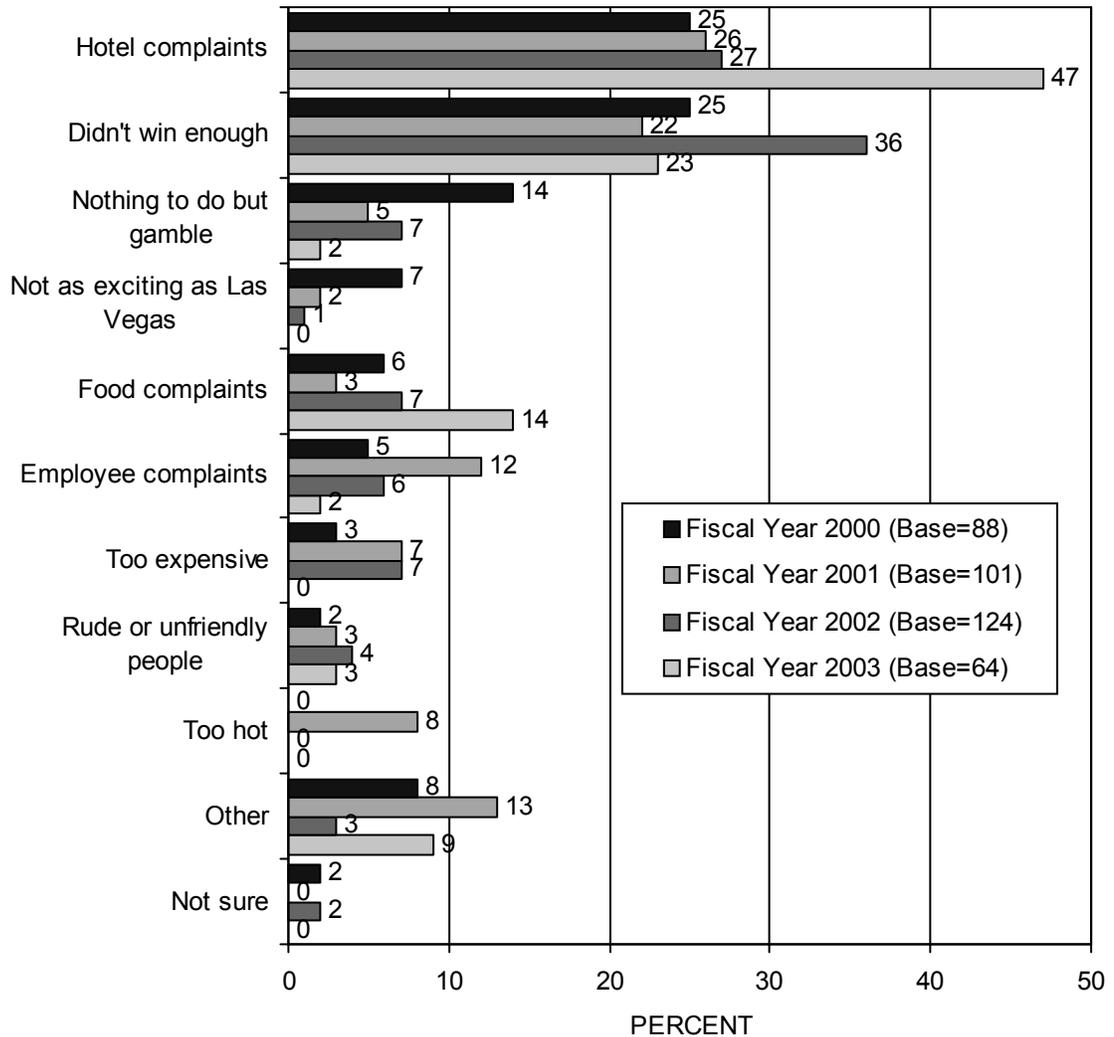
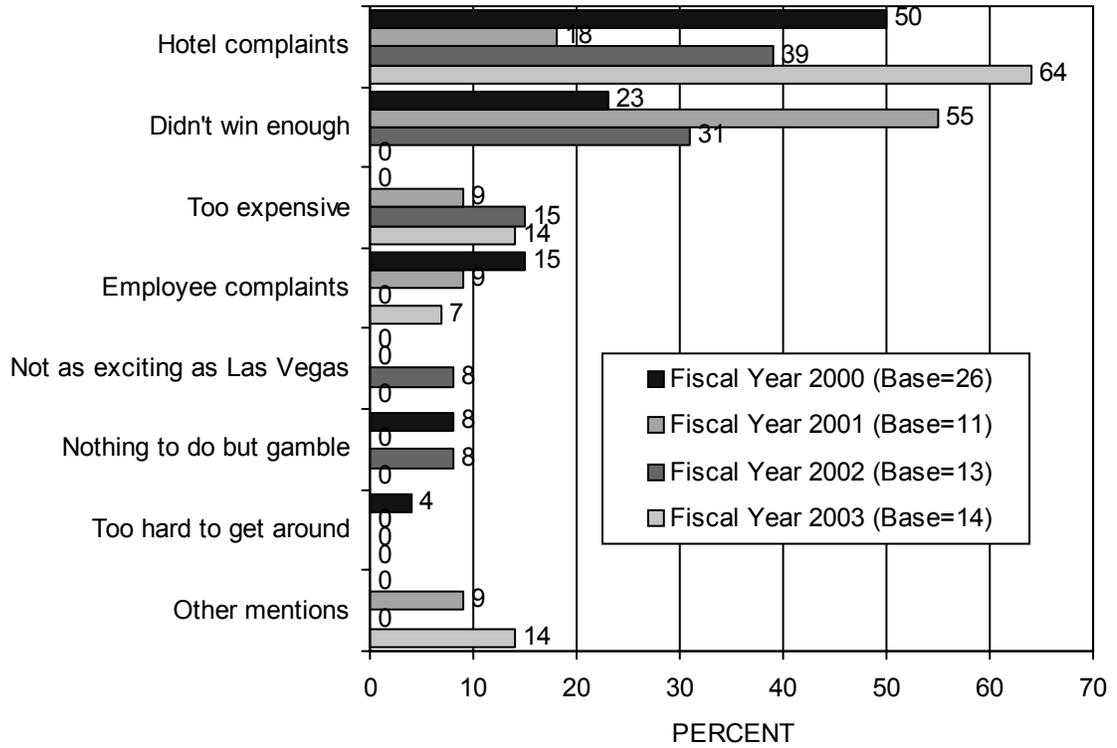


FIGURE 50
 Why Not “Very” Satisfied With Visit
 (Among Those Who Were “Somewhat” Satisfied)



Those who were “somewhat” satisfied were asked why they were not “very” satisfied (Figure 50). Of the 64 respondents in this category, the largest proportion (47%) said they had hotel complaints (up significantly from about one-quarter of visitors in past years). Twenty-three percent (23%) said they did not win enough money gambling, while 14% had complaints about the food. Smaller proportions said they encountered rude and unfriendly people (3%), had complaints about hotel/casino employees (2%), or said there were not enough things to do in Mesquite outside of gambling (2%).

FIGURE 51
Why Dissatisfied With Visit
(Among Those Who Were Dissatisfied)



Those who were dissatisfied were asked why (Figure 51). Of the 14 respondents in this category, 64% had hotel complaints, and 14% said they thought Mesquite was too expensive.

VISITOR DEMOGRAPHICS

As Figures 52 and 53 show, respondents to the 2003 Mesquite Visitor Profile were likely to be married (85%), white (96%), over 50 years old (66%), and from the Western U.S. (80%). Respondents were more likely to be employed (57%) than retired (38%). More than one-half of visitors (56%) had a household income of less than \$60,000 (up from 47% last year), while 37% had incomes of \$60,000 or more. Four in ten (43%) had a high school education or less.

FIGURE 52
VISITOR DEMOGRAPHICS

	FISCAL YEAR 2000	FISCAL YEAR 2001	FISCAL YEAR 2002	FISCAL YEAR 2003
<u>GENDER</u>				
Male	54%	55%	52%	51%
Female	46	45	48	49
<u>MARITAL STATUS</u>				
Married	78	77	82	85
Single	11	12	7	5
Separated/divorced	7	7	7	7
Widowed	4	4	5	3
<u>EMPLOYMENT</u>				
Employed	56	53	55	57
Unemployed	2	1	1	1
Student	1	1	1	0
Retired	37	41	40	38
Homemaker	5	5	4	3
<u>EDUCATION</u>				
High school or less	43	46	38	43
Some college	30	24	34	32
College graduate	25	28	25	22
Trade/vocational school	2	2	3	3
<u>AGE</u>				
21 to 29	7	8	5	5
30 to 39	15	13	10	10
40 to 49	21	19	20	18
50 to 59	23	24	26	28
60 to 64	12	12	13	12
65 or older	22	25	26	26
MEAN	51.8	52.9	54.3	54.3
BASE	(1200)	(1200)	(1200)	(1200)

FIGURE 53
VISITOR DEMOGRAPHICS
(Continued/2)

	FISCAL YEAR 2000	FISCAL YEAR 2001	FISCAL YEAR 2002	FISCAL YEAR 2003
<u>ETHNICITY</u>				
White	93%	92%	95%	96%
African-American/Black	1	1	2	1
Asian/Asian American	1	1	1	1
Hispanic/Latino	3	3	2	2
Other	2	2	1	1
<u>HOUSEHOLD INCOME</u>				
Less than \$20,000	5	4	2	3
\$20,000 to \$39,999	20	28	20	24
\$40,000 to \$59,999	32	28	25	29
\$60,000 to \$79,999	14	13	16	20
\$80,000 or more	15	14	22	17
Not sure/no answer	14	13	14	7
<u>VISITOR ORIGIN</u>				
<u>U.S.A.</u>	<u>92</u>	<u>93</u>	<u>94</u>	<u>94</u>
Eastern states ¹	2	2	1	1
Southern states ²	3	2	4	4
Midwestern states ³	6	8	9	9
<u>Western states⁴</u>	<u>81</u>	<u>81</u>	<u>79</u>	<u>80</u>
<u>California</u>	<u>10</u>	<u>10</u>	<u>9</u>	<u>10</u>
Southern California	9	8	8	9
Northern California	2	2	1	1
<u>All Other West</u>	<u>71</u>	<u>71</u>	<u>70</u>	<u>70</u>
Utah	41	36	33	30
Arizona	4	4	3	6
Greater Las Vegas	8	11	10	9
Other West	18	20	24	25
No ZIP code given	0	0	2	0
<u>Foreign</u>	<u>8</u>	<u>7</u>	<u>6</u>	<u>6</u>
BASE	(1200)	(1200)	(1200)	(1200)

¹ Eastern states: Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

² Southern states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

³ Midwestern states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

⁴ 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 DAY:
 INTERVIEW LOCATION CODE _____
 TIME STARTED (USE 24-HOUR CLOCK)
 ____:____

TIME ENDED (USE 24-HOUR CLOCK)
 ____:____
 INTERVIEW LENGTH ____ MIN.
 INTERVIEWER ID # _____
RESPONDENT GENDER (BY OBSERVATION)
 MALE51%
 FEMALE49

Hello. I'm _____ from GLS Research, a national marketing research firm. We are conducting a survey of visitors to Mesquite. All answers are kept strictly confidential.

1. Are you a visitor to Mesquite, or are you a resident of the Mesquite 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 Mesquite within the next 24 hours?

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

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

FIRST VISIT	18%	SKIP TO QA4 ON PAGE 2
VISITED BEFORE.....	82	ASK A2
NOT SURE/DK.....	0	
REFUSED/NA	0	

A2. Including this trip, how many times have you visited Mesquite 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.**)

18.61 MEAN (ALL VISITORS)
22.47 MEAN (REPEAT VISITORS) (N=984)

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

8.15 MEAN (ALL VISITORS)
9.72 MEAN (REPEAT VISITORS) (N=984)

A4. (**ASK OF ALL RESPONDENTS.**)
How did you first become aware of Mesquite?
(**ASK AS AN OPEN-ENDED QUESTION. ACCEPT ONLY ONE RESPONSE.**)

NEWSPAPER AD	1%
MAGAZINE AD	1
RADIO OR TELEVISION AD	3
BILLBOARD/SIGN	3
FRIENDS/RELATIVES (WORD-OF-MOUTH)	38
TRAVEL AGENT	1
HOTEL/MOTEL DIRECTORY	1
BROCHURE/PAMPHLET	0
JUST PASSING THROUGH.....	48
SOME OTHER WAY.....	0
NOT SURE/DK	4
REFUSED/NA.....	0

A5. What was the *primary purpose* of *THIS* trip to Mesquite? (**ASK AS AN OPEN-END. ACCEPT ONLY ONE RESPONSE. WRITE RESPONSE IN BLANK BELOW.**)

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW.....	0%
TO ATTEND A CORPORATE MEETING	1
TO GAMBLE	11
INCENTIVE TRAVEL PROGRAM (WON A TRIP AS A BONUS FROM EMPLOYER).....	0
VACATION/PLEASURE.....	41
VISIT FRIENDS/RELATIVES.....	7
TO ATTEND A SPECIAL EVENT (E.G., GOLF, RODEO, OR A FIGHT).....	1
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	0
OTHER BUSINESS PURPOSES	2
JUST PASSING THRU	35
WEDDING/TO GET MARRIED.....	0
TO PLAY GOLF	0
TO GO TO A SPA	0
SOME OTHER REASON	2
NOT SURE/DK.....	0
REFUSED/NA	0

A6. Is this visit to Mesquite part of a longer trip where Mesquite is just one leg of that trip, or is Mesquite your only destination?

PART OF LONGER TRIP 63%	ASK A7
ONLY DESTINATION..... 37	SKIP TO B1
NOT SURE/DK 0	
REFUSED/NA..... 0	

A7. You just said Mesquite was not your only destination on this trip. When you left your home town or city, what was the PRIMARY destination of your trip? **(ASK AS AN OPEN-ENDED QUESTION. ACCEPT ONLY ONE RESPONSE. NOTE: THE PRIMARY DESTINATION CANNOT BE THEIR HOME TOWN OR CITY. PROBE IF NECESSARY TO MAKE SURE IT IS NOT: "That's not your home town or city, is it?")**
 (N=757)

- LAS VEGAS, NEVADA 20%
- OTHER NEVADA 25
- UTAH..... 16
- CALIFORNIA..... 19
- OTHER WEST 18
- OTHER U.S..... 2
- OTHER NORTH AMERICA 1

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

- Air..... 0%
- Bus
 (IF "YES" ASK, "Do you mean...":)
 Regularly scheduled bus service like Greyhound 0
- Or a chartered or escorted bus service or bus tour 1
- Automobile..... 80
- Truck..... 10
- Motorcycle 0
- Recreational Vehicle (RV)..... 9
- REFUSED/NA..... 0

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

- SAME DAY 26%
- 1-3 DAYS BEFORE 15
- 4-6 DAYS BEFORE 4
- 7-14 DAYS BEFORE 17
- 15-30 DAYS BEFORE 15
- 31-60 DAYS BEFORE 10
- 61-90 DAYS BEFORE 5
- MORE THAN 90 DAYS BEFORE..... 9
- NOT SURE/DK 0
- REFUSED/NA..... 0

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

YES 2%	ASK B4
NO 98	SKIP TO B5
NOT SURE/DK..... 0	
REFUSED/NA 0	



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

B4. Did the travel agent... **(READ LIST)** (N=26)

	<u>YES</u>	<u>NO</u>	<u>DON'T KNOW</u>	<u>RE-FUSED</u>
Influence your decision to visit Mesquite?.....	46%	54%	0%	0%
Influence your choice of accommodations?	42	58	0	0
"Book" your accommodations?.....	81	19	0	0
"Book" your transportation?.....	65	35	0	0

B5. (ASK OF ALL RESPONDENTS.)

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

	READ THESE RESPONSE CODES			DO NOT READ THESE RESPONSE CODES		
	Before Leaving <u>Home</u>	While En Route To <u>Mesquite</u>	After <u>Arrival</u>	DOES NOT <u>APPLY</u>	DON'T <u>KNOW</u>	RE- <u>FUSED</u>
a. Where to lodge in Mesquite?	53%	2%	9%	32%	0%	5%
b. What shows to see in Mesquite?	2	1	10	87	0	0
c. What attractions to visit in or near Mesquite?.....	2	2	7	89	0	0
d. What events to attend in Mesquite?.....	2	1	8	89	0	0
e. Where to gamble in Mesquite?	43	6	38	14	0	0
f. What recreational activities you would enjoy in Mesquite?	12	0	2	86	1	0

**C1. On this trip to Mesquite, where did you lodge?
(ASK AS OPEN END. ACCEPT ONLY ONE
RESPONSE. A "LODGING" IS ANY PLACE
THE RESPONDENT SLEPT OVERNIGHT.
SOME PEOPLE MIGHT COME TO MESQUITE
AT NIGHT JUST TO GAMBLE THROUGH THE
NIGHT AND LEAVE THE NEXT DAY. THESE
PEOPLE DID NOT "LODGE" ANYWHERE —
CODE 96.)**

- CasaBlanca Resort
(formerly Players Island) 17%
- Desert Palms Motel 0
- Eureka Hotel & Casino
(formerly the Holiday Inn
Rancho Mesquite) 4
- Mesquite Budget Inn & Suites 0
- Mesquite Springs Motel..... 0
- Si Redd's Oasis Resort Hotel &
Casino 16
- State Line Motel & Casino..... 0
- Valley Inn Motel..... 0
- Virgin River Hotel Casino 15
- Mesquite Star 0
- OTHER HOTEL/MOTEL 0
- TIMESHARE..... 2
- FRIENDS/RELATIVES..... 5
- RV/CAMPER/CAMPING 9
- DID NOT LODGE ANYWHERE .. 32
- NOT SURE/DK..... 0
- REFUSED/NA 0

**IF RESPONSE TO C1 IS STAYED AT A HOTEL OR
MOTEL (CODES 01-10, 97),
ASK C2 THROUGH C8.**

**ANY OTHER RESPONSE TO C1,
SKIP TO C9 ON PAGE 6.**

- C2. How far in advance did you make your
reservations for your (hotel room/motel room/RV
park space) for this trip to Mesquite? (ASK AS
OPEN END.)** (N=631)
- SAME DAY.....28%
 - 1-3 DAYS BEFORE12
 - 4-6 DAYS BEFORE6
 - 7-14 DAYS BEFORE23
 - 15-30 DAYS BEFORE14
 - 31-60 DAYS BEFORE8
 - 61-90 DAYS BEFORE4
 - MORE THAN 90
DAYS BEFORE3
 - NOT SURE/DK2
 - REFUSED/NA.....0

- C3. Including yourself, how many people stayed in your room? (N=631)
- ONE 7%
- TWO..... 83
- THREE..... 6
- FOUR..... 3
- FIVE..... 1
- SIX OR MORE..... 0
- REFUSED/NA..... 0

- C4. Which of the following rate categories best describes your room rate? (**SHOW CARD "A."** ACCEPT ONLY ONE RESPONSE.) (N=631)

HOTEL PACKAGE DEAL .14%	ASK C5
TOUR/ TRAVEL GROUP 1	
CONVENTION GROUP/ COMPANY MEETING..... 1	SKIP TO C8
CASINO RATE 1	
REGULAR FULL- PRICE ROOM RATE 65	
CASINO COMPLIMENTARY..... 17	SKIP TO C9
ANOTHER RATE 1	SKIP TO C8
NOT SURE/DK..... 0	
REFUSED/NA 0	

- C5. Did you purchase your package directly from a hotel? (N=96)
- YES..... 91%
- NO..... 9
- NOT SURE/DK 0
- REFUSED/NA..... 0

- C6. What was the total *PER PERSON* cost of your package? (**ROUND TO NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.**) (N=96)
- \$192.89 MEAN
- \$120.00 MEDIAN

- C7. Where did you *first* hear about this package? (**DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.**) (N=96)
- NEWSPAPER 5%
- TELEVISION 17
- RADIO 10
- MAGAZINE 9
- TRAVEL AGENT 5
- WORD-OF-MOUTH 51
- INTERNET/WEBSITE 1
- OTHER..... 1
- NOT SURE/DK 0
- REFUSED/NA..... 0

PACKAGE VISITORS SKIP TO C9

- C8. (**ASK ONLY OF NON-PACKAGE VISITORS**) By the time you leave Mesquite, 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=430)
- \$37.88 MEAN
- \$30.00 MEDIAN

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.)

2.18 MEAN
2.00 MEDIAN

C10. Are there any people *under the age of 21* in your *IMMEDIATE* party?
YES 7%
NO 93
NOT SURE/DK 0
REFUSED/NA 0

C11. By the time you leave, how many *nights* will you have stayed in Mesquite? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)**

1.73 MEAN
1.00 MEDIAN

IF THE ANSWER TO C11 IS "00," THEN C1 MUST BE "96."

C12. By the time you leave, how many *days* will you have been in Mesquite? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW. MUST BE AT LEAST "01.")**

2.73 MEAN
2.00 MEDIAN

C13. On what day of the week did you arrive in Mesquite?
SUNDAY 17%
MONDAY 14
TUESDAY 13
WEDNESDAY 15
THURSDAY 12
FRIDAY 15
SATURDAY 14
REFUSED/NA 0

D1. Have you gambled during this visit to Mesquite?

YES 86%	ASK D2 SKIP TO D5 ON PAGE 7
NO 14	
NOT SURE/DK 0	
REFUSED/NA 0	

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=1037)

3.28 MEAN
3.00 MEDIAN

D3. Which type of casino game do you play *MOST OFTEN*. **(DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=1037)

- SLOT MACHINES..... 47%
- VIDEO POKER 22
- OTHER VIDEO MACHINES (21, KENO, ETC.)..... 3
- BACCARAT 0
- BIG 6 0
- BINGO 4
- BLACKJACK 17
- CARIBBEAN STUD POKER..... 0
- CRAPS 3
- KENO 1
- POKER..... 1
- RACE/SPORTS-BOOK..... 1
- ROULETTE 1
- OTHER..... 0
- NOT SURE/DK..... 0
- REFUSED/NA..... 0

D4. 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=1037)

\$215.83 MEAN
\$100.00 MEDIAN

D5. **(ASK OF ALL RESPONDENTS.)** Within the past 12 months, have you gambled at a casino facility anywhere in the United States outside of the Mesquite area? Please do not include "card rooms," even though they are similar to casinos.

- YES..... 77%
- NO 23
- NOT SURE/DK 0
- REFUSED/NA..... 0

B6. Will you (or did you) visit other areas of Nevada or the surrounding area, either before or after this visit to Mesquite?

YES 44%	ASK B7
NO 56	SKIP TO B8
NOT SURE/DK..... 0	
REFUSED/NA 0	

B7. On this trip, will you (or did you) visit... **(READ LIST. ACCEPT MULTIPLE RESPONSES.)** (N=523)

- A. Las Vegas..... 70%
- B. Laughlin 19
- C. Primm (Stateline)..... 7
- D. Hoover Dam 7
- E. Lake Mead..... 4
- F. Mt. Charleston/ Lee Canyon.... 0
- G. Valley of Fire..... 7
- H. Grand Canyon 7
- I. Death Valley 1
- J. Bryce Canyon..... 10
- K. Zion National Park..... 14
- L. St. George (Utah) 25
- X. Other..... 6

B8. Did you play golf while visiting Mesquite?

YES 8%
 NO 92
 NOT SURE/DK 0
 REFUSED/NA 0

B9. While in Mesquite, did you stop by the Mesquite Visitors Center?

YES..... 1%
 NO 99
 NOT SURE/DK 0
 REFUSED/NA..... 0

C14. By the time you leave Mesquite, how much will you have spent *ON AVERAGE PER DAY* in Mesquite for...
(READ EACH ITEM. ROUND TO THE NEAREST DOLLAR. WRITE AMOUNT IN BLANKS BELOW.)

A. Food and drink. Please include only your own, personal expenses and not those of your entire party.

\$52.89 MEAN (INCLUDING \$0) PER TRIP
\$57.38 MEAN (EXCLUDING \$0) AVERAGE

B. Local transportation (for example, car rental, taxi limo, gas). Please include all your daily transportation expenses.

\$7.31 MEAN (INCLUDING \$0) PER TRIP
\$146.05 MEAN (EXCLUDING \$0) AVERAGE

C15. By the time you leave Mesquite, how much will you have spent in Mesquite 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. Recreational activities such as golf, horseback riding, a spa, or shooting

\$7.05 MEAN (INCLUDING \$0)
\$106.97 MEAN (EXCLUDING \$0)

B. Shows/entertainment (not including gambling)

\$0.08 MEAN (INCLUDING \$0)
\$16.83 MEAN (EXCLUDING \$0)

X. Other

\$6.55 MEAN (INCLUDING \$0)
\$83.52 MEAN (EXCLUDING \$0)



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

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

Very satisfied..... 94%	SKIP TO G1 ON PAGE 9
Somewhat satisfied 5	ASK F2
Somewhat dissatisfied 1 Very dissatisfied 0	SKIP TO F3
<u>DO NOT READ</u> NOT SURE/DK..... 0 REFUSED/NA 0	SKIP TO G1 ON PAGE 9

F2. You just said you were *somewhat* satisfied with your overall experience in Mesquite. What is the *MAIN* reason that keeps you from saying you were *very* satisfied? **(ACCEPT ONLY ONE RESPONSE.)** (N=64)

- | | | | |
|---|-----|---|----|
| HOTEL COMPLAINTS | 47% | TRANSPORTATION COMPLAINTS/
HARD TO GET AROUND..... | 2% |
| GAMBLING COMPLAINTS | 23 | OTHER MENTIONS | 3 |
| FOOD COMPLAINTS..... | 14 | NO ANSWER/REFUSED | 0 |
| SMOKING COMPLAINTS..... | 5 | | |
| RUDE/UNFRIENDLY PEOPLE..... | 3 | | |
| NOTHING TO DO BUT GAMBLE | 2 | | |
| HOTEL/CASINO EMPLOYEE
COMPLAINTS | 2 | | |

AFTER ANSWERING F2, SKIP TO G1

F3. What is the *MAIN* reason you were dissatisfied with your overall experience in Mesquite? **(ACCEPT ONLY ONE RESPONSE.)** (N=14)

- | | | | |
|---|-----|------------------------------|---|
| HOTEL COMPLAINTS | 64% | SMOKING COMPLAINTS | 7 |
| TOO EXPENSIVE | 14 | RUDE/UNFRIENDLY PEOPLE | 7 |
| HOTEL/CASINO EMPLOYEE
COMPLAINTS | 7 | | |



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	57%	ASK G2
Unemployed	1	SKIP TO G3
Student.....	0	
Retired.....	38	
Homemaker.....	3	
<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 NOT AN ACCEPTABLE RESPONSE. PROBE FOR THE TYPE OF WORK DONE.)** (N=686)

- SERVICE WORKER.....29%
- SALES/CLERICAL.....25
- PROFESSIONAL/TECHNICAL.....18
- MANAGER/OFFICIAL/
PROPRIETOR.....15
- CRAFTWORKER/FOREMEN.....10
- FARMING/AGRICULTURE.....2
- LABORER.....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.....4%
- HIGH SCHOOL DIPLOMA
(FINISHED GRADE 12).....39
- SOME COLLEGE (INCLUDES
JUNIOR/COMMUNITY
COLLEGE — NO BACHELOR'S
DEGREE).....32
- GRADUATED COLLEGE.....16
- GRADUATE SCHOOL
(MASTER'S OR PH.D.).....6
- TECHNICAL, VOCATIONAL,
OR TRADE SCHOOL.....3
- REFUSED/NA.....0

G4. What is your marital status? Are you... **(READ FIRST 4 ITEMS IN LIST.)**

- Married.....85%
- Single.....5
- Separated or divorced.....7
- Widowed.....3
- REFUSED/NA.....0

G5. What country do you live in?

USA..... 94%	ASK G6	
AUSTRALIA..... 0	* - less than 1%	
CANADA..... 5		
ENGLAND (GREAT BRITAIN) *		
FRANCE 0		
GERMANY..... *		
ITALY *		
JAPAN *		
MEXICO..... 0		
NETHERLANDS (HOLLAND) *		SKIP TO G7
SOUTH KOREA..... 0		
SWEDEN 0		
OTHER EUROPE (NORWAY, DENMARK, SPAIN, PORTUGAL, ETC.; SPECIFY:) 0		
OTHER *		
REFUSED/NA..... *		SKIP TO G7

G6. **(ASK ONLY OF VISITORS FROM THE USA)**
What is your ZIP code, please?
(REGION - FROM ZIP CODE)

EAST	1%
SOUTH	4
MIDWEST.....	9
WEST	80
CALIFORNIA.....	10
SOUTHERN CA	9
NORTHERN CA	1
UTAH.....	30
ARIZONA.....	6
OTHER WEST	34
FOREIGN VISITORS	6
NO ZIP CODE	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 or African American, Asian or Asian American, Hispanic or Latino — or of some other ethnic or racial background?)**

WHITE.....	96%
BLACK OR AFRICAN AMERICAN	1
ASIAN OR ASIAN AMERICAN.....	1
HISPANIC/LATINO	2
NATIVE AMERICAN	1
MIXED RACE.....	0
OTHER.....	0
NOT SURE/DON'T KNOW	0
REFUSED/NO ANSWER.....	0

EDITORS!
ALL EUROPEAN AND MIDDLE EASTERN NATIONALITIES (FOR EXAMPLE, IRISH, ITALIAN, JEWISH, ARAB, ARMENIAN, TURKISH, ETC.) SHOULD BE CLASSIFIED AS "WHITE". ALL PACIFIC ISLANDERS (PHILIPPINES, HAWAII, SAMOA, FIJI, ETC.) SHOULD BE CLASSIFIED AS "ASIAN".

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

54.30 MEAN
55.00 MEDIAN

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

- 21 to 29 5%
- 30 to 39 10
- 40 to 49 18
- 50 to 59 28
- 60 to 64 12
- 65 and older 26
- REFUSED/NA 1

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

- A. Less than \$20,000 3%
- B. \$20,000 to \$29,999 9
- C. \$30,000 to \$39,999 15
- D. \$40,000 to \$49,999 16
- E. \$50,000 to \$59,999 13
- F. \$60,000 to \$69,999 11
- G. \$70,000 to \$79,999 9
- H. \$80,000 to \$89,999 6
- I. \$90,000 to \$99,999 4
- J. \$100,000 or more 7
- NOT SURE/DK 0
- REFUSED/NA 7

CARD A

HOTEL/MOTEL RATES

1. **HOTEL/AIRLINE PACKAGE DEAL**
One price that includes your room and may also include other items such as airfare, ground transportation, shows, or meals.
2. **TOUR/TRAVEL GROUP**
Traveling as part of a group. Package price includes room and may also include other items such as airfare, ground transportation, shows, or meals.
3. **CONVENTION GROUP/COMPANY MEETING**
Arranged through an employer or convention.
4. **CASINO RATE**
Special reduced rate arranged through a casino host or casino employee.
5. **REGULAR FULL-PRICE ROOM RATE**
Full price, no discounts.
6. **CASINO COMPLIMENTARY**
Room is free of charge.
7. **ANOTHER RATE**
Any other special room rate not shown above.

CARD B

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 or more**