LAUGHLIN
VISITOR PROFILE STUDY

2019

Prepared for:
Las Vegas Convention And Visitors Authority

By: GLS Research

425 Second St., Suite 400, San Francisco, CA 94107
Telephone: (415) 974-6620 | Facsimile: (415) 947-0260 | www.glsresearch.com

ACKNOWLEDGMENTS

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

VISITOR PROFILE STUDY

3150 Paradise Road, Las Vegas, NV 89109-9096 • 702-892-0711 | LVCVA.com
VisitLasVegas.com • VegasMeansBusiness.com • VisitLaughlin.com • VisitMesquite.com

TABLE OF CONTENTS

EXECUTIVE SUMMARY 7

INTRODUCTION 11

METHODOLOGY 12

SUMMARY OF FINDINGS

- REASONS FOR VISITING 13
- TRAVEL PLANNING 19
- TRIP CHARACTERISTICS AND EXPENDITURES 28
- GAMING BEHAVIOR AND BUDGETS 39
- ATTITUDINAL INFORMATION 43
- VISITOR DEMOGRAPHICS 45

APPENDIX

Summary Tables of Visitor Characteristics

Aggregate Results for Calendar Year 2019

TABLE OF FIGURES

REASONS FOR VISITING

FIGURE 1:	First Visit vs. Repeat Visit	13
FIGURE 2:	Frequency Of Visits In Past Five Years (All Visitors)	13
FIGURE 3:	Frequency Of Visits In Past Five Years (Repeat Visitors)	14
FIGURE 4:	Frequency Of Visits In Past Year (All Visitors)	14
FIGURE 5:	Frequency Of Visits In Past Year (Repeat Visitors)	15
FIGURE 6:	Primary Purpose Of First Visit (Repeat Visitors)	15
FIGURE 7:	Primary Purpose Of Current Visit (Repeat Visitors)	16
FIGURE 8:	Primary Purpose Of Current Visit (All Visitors)	16
FIGURE 9:	Primary Purpose Of First Visit Vs. Current Visit – 2018 (Repeat Visitors)	17
FIGURE 10:	Primary Purpose Of Current Visit – 2018 (First-Time vs. Repeat Visitors)	17
FIGURE 11:	Gaming Tournaments	18
FIGURE 12:	Visited Laughlin In The Past For A Special Event	18

TRAVEL PLANNING

FIGURE 13:	Advance Travel Planning	19
FIGURE 14:	Transportation To Laughlin	19
FIGURE 15:	Whether Laughlin Visit is Part of a Longer Trip	20
FIGURE 16:	Primary Destination of Trip	20
FIGURE 17:	When Decided Where To Stay	21
FIGURE 18:	When Decided Where To Gamble	22
FIGURE 19:	When Decided Which Shows To See	22
FIGURE 20:	Tools Used In Planning Trip To Laughlin	23
FIGURE 21:	Social Media, Travel Review Apps or Websites Used in Planning Trip to Lauglin	23
FIGURE 22:	Whether Visited Las Vegas During Past Five Years	24
FIGURE 23:	Visiting Las Vegas On This Trip To Laughlin	24
FIGURE 24:	Transportation To Las Vegas	25
FIGURE 25:	Visiting Downtown Las Vegas	26
FIGURE 26:	Visiting The Las Vegas Strip	26
FIGURE 27:	Touring Other Nearby Places	27
FIGURE 28:	Other Nearby Places Visited	27

TRIP CHARACTERISTICS AND EXPENDITURES

FIGURE 29: Adults In Immediate Party 28
FIGURE 30: Whether Had Persons In Party Under Age 21 28
FIGURE 31: Nights Stayed 29
FIGURE 32: Days Stayed 29
FIGURE 33: Day Of Arrival 30
FIGURE 34: Weekend Versus Weekday Arrival 30
FIGURE 35: Type Of Lodging 31
FIGURE 36: How Booked Accommodations 31
FIGURE 37: Website Or App Used To Book Accommodations 32
FIGURE 38: How Far In Advance Accommodations Were Booked 32
FIGURE 39: Type Of Room Rate 33
FIGURE 40: Room Rate By Booking Method 33
FIGURE 41: Package vs. Non-Package Rates 34
FIGURE 42: Cost Of Package – Per Person 34
FIGURE 43: How First Learned About Package 35
FIGURE 44: Lodging Expenditures – Average Per Night 35
FIGURE 45: How First Learned About Room Rate 36
FIGURE 46: Number Of Room Occupants 36
FIGURE 47: Average Trip Expenditures On Food & Drink And Local Transportation (Including Visitors Who Spent Nothing) 37
FIGURE 48: Average Trip Expenditures On Food & Drink And Transportation (Among Spenders) 37
FIGURE 49: Average Trip Expenditures On Shopping, Shows, And Sightseeing (Including Visitors Who Spent Nothing) 38
FIGURE 50: Average Trip Expenditures On Shopping, Shows, And Sightseeing (Among Spenders) 38

GAMING BEHAVIOR AND BUDGETS

FIGURE 51: Whether Gambled While In Laughlin 39
FIGURE 52: Hours Of Gambling – Average Per Day 39
FIGURE 53: Number Of Different Casinos Gambled 40
FIGURE 54: Trip Gambling Budget 40
FIGURE 55: Whether Member Of A Slot/Loyalty Club 41
FIGURE 56: Where Vistors Gambled Outside Laughlin 42

ATTITUDINAL INFORMATION

FIGURE 57:	Satisfaction With Visit	43
FIGURE 58:	Why Not 'Very' Satisfied With Visit	43
FIGURE 59:	Likelihood Of Returning To Laughlin Next Year	44
FIGURE 60:	Likelihood Of Recommending Laughlin To Others	44

VISITOR DEMOGRAPHICS

FIGURE 61:	Gender	45
	Marital Status	45
	Employment	45
	Education	45
	Age	45
FIGURE 62:	Ethnicity	46
	Household Income	46
	Visitor Origin	46

EXECUTIVE SUMMARY

In 2019 most of the characteristics and behaviors of Laughlin visitors remained consistent with recent years. However, over the past five years lodging visitors have been somewhat less likely to purchase a package of some kind and somewhat more likely to be paying a regular room rate. Non-package visitors on average paid the highest amount per day for their room in 2019.

Relatively more people were first-time visitors to Laughlin in 2019 than any time over the past five years. While visiting for vacation or pleasure is the most often cited driver of visitation among both first-time and repeat visitors over the past five years, the gaming experience is a relatively more important driver of visitation for repeat visitors than for first-time visitors. Past visitors themselves continue to be good brand ambassadors very willing to recommend Laughlin to others. While most visitors in 2019 continued to book their accommodations directly with the property, booking via a website or app increased to its highest level in the past five years.

Travel planning in 2019 shifted slightly towards more closer in planning and the use of all planning tools with the exception of travel agents increased dramatically. One-third of 2019 visitors used websites, social media, or apps during travel planning. Among these visitors, most of them used Google, but there were also large increases in the proportion of visitors using reviews at online travel agencies and/or reviews at hotel or show venue websites.

Gaming characteristics have varied little over the past five years. Nearly every visitor gambles, and on average spends about the same amount of time gambling and with a similar gaming budget. In 2019 relatively more gamblers decided on where to gamble after arrival and relatively fewer gamblers were gambling at other destinations.

Expenditures on shopping in 2019 rose to its highest level in the past five years while spending on shows was at its highest level since 2016.

Summary tables of selected characteristics over the past five years by topical area are provided in the appendix.

REASONS FOR VISITING

The average number of visits in the past year and over the past five years among all visitors generally, and repeat visitors specifically, has remained stable since 2017 and above the averages observed in 2015 and 2016. The proportion of first-time visitors spiked up to its highest level in the past five years.

Vacation or pleasure and gambling continue to be the primary trip motivators for Laughlin among both first-time and repeat visitors over the past five years. However, repeat visitors in 2019 were much more likely to say the reason for their current visit was to gamble compared to first-time visitors, while first-time visitors were much more likely than repeat visitors to say the reason for their current visit was to visit friends or relatives. This suggests that Laughlin's gaming experience is a relatively greater motivator for repeat visitation than it is for an initial Laughlin visit.

TRAVEL PLANNING

Although travel planning characteristics continued to remain similar over the past five years, decisions on where to gamble and what shows to see have shifted toward becoming within destination choices. In 2019 four in ten Laughlin visitors decided where they would gamble after they arrived in Laughlin and nearly one-half decided on what shows to see after arrival. Travel planning in 2019 tended to be somewhat closer in from visitation compared to last year with fewer visitors planning more than 90 days in advance.

About nine in ten Laughlin visitors continued to say that Laughlin was their only travel destination, used ground transportation to get to Laughlin, and nearly all of them decided where they would stay before they arrived in Laughlin. In 2019 use of websites, apps, and social media spiked up substantially from all past years to nearly one-third of all visitors. While Google remained the predominant online planning tool, 2019 saw a dramatic increase in the use of reviews at online travel agencies and hotel or show venue websites.

Use of travel agents for trip planning has been minimal over the past five years and is currently only two percent of Laughlin visitors. About one quarter of Laughlin visitors continue to visit nearby locations (other than Las Vegas) during their trip, primarily Oatman, Arizona and/or the Lake Mojave/Davis Dam area. In 2019 many more Laughlin visitors than in the past five years had visited or were planning to visit Hoover Dam, the Grand Canyon, and/or Lake Mead.

TRIP CHARACTERISTICS AND EXPENDITURES

Overall, many primary trip characteristics have remained relatively unchanged over the past five years including the proportion of visitors who stayed overnight, the proportion of visitors who stayed in a hotel or motel room, and length of stay. However, in 2019 some characteristics differed from past years including a smaller adult party size, a larger proportion of visitors with people under 21 in their party, and slightly more room occupants. Calling the property directly for booking accommodations declined from past years while using a website or app increased. In 2019, about one quarter of lodging visitors who booked their accommodations online booked on the property's website, the lowest proportion in the past five years. Use of the websites Priceline.com or Orbitz.com saw much greater usage in 2019 than at any time during the past five years.

Over the past five years the proportion of lodging visitors paying a regular room rate has been increasing to about three in ten lodging visitors, while the proportion of lodging visitors getting a casino comp rate has declined in 2019. The average per night paid by non-package lodgers in 2019 for their room increased to $56.51, the highest average over the past five years.

In 2019, we observed the highest average trip amount spent on shopping in the past five years, while average trip expenditures for food and drink, local transportation, and shows remained above the averages spent before 2017. Trip spending on sightseeing has remained in the same range over the past five years

GAMING BEHAVIOR AND BUDGETS

Although down slightly in 2019, over the past five years nearly all Laughlin visitors said they gambled. Among gamblers, the average hours per day spent gambling has remained at around five hours over the past five years. The average trip gambling budget has also remained in the same range over the past five years

The average number of casinos gambled at during their visit in 2019 declined to its lowest level in the past five years. Just under nine in ten Laughlin gamblers in 2019 were members of a slot or loyalty club, the lowest proportion in the past five years, but still indicative of more than a casual interest in gambling among these visitors. Additionally, in 2019 fewer visitors gambled at Native American casinos in Arizona, at other Native American casinos outside of California or Arizona, in Las Vegas, or at other places in Nevada than had done so in the past five years.

ATTITUDINAL INFORMATION

Visitor satisfaction with their Laughlin trip has remained nearly unchanged over the past five years with only 1% expressing dissatisfaction. Most 2019 visitors said they definitely would return to Laughlin within the next year, somewhat more than during the 2015 to 2017 time period. Laughlin visitors remain good brand ambassadors for the destination as nearly nine in ten 2019 visitors said they definitely will recommend Laughlin to others, in the same range over the past five years.

NOTABLE VISITOR DEMOGRAPHICS

The 2019 demographic profile of Laughlin visitors shows little change in the origin of visitors, their level of education, and their household income. However, in 2019 there were some changes in other demographic characteristics that, if continued over time, could signal potential differences in the tastes and preferences of visitors for their Laughlin trip experience.

Specifically, the 2019 Laughlin visitor is somewhat less likely to be retired, White, or to be married. The average age of visitors has declined to its lowest level in the past five years with a downward trend in the proportion of visitors who are 65 or more years old over this five year time frame.

Over the past five years, just over one-third of Laughlin visitors have resided in Southern California, while foreign visitors have trended down to only about 3%. However, in 2019 the proportion of visitors from the greater Las Vegas area spiked up to its highest level in the past five years. Over the past five years about one-half of Laughlin visitors have had an annual household income of less than $60,000 and about one quarter of them have had an annual household income in excess of $80,000.

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.
- Monitor trends in visitor behavior and visitor characteristics.
- Supply detailed information on the vacation and gaming habits of different visitor groups, particularly gaming and non-gaming expenditures.
- Allow the identification of market segments and potential target markets.
- Provide a basis for calculating the economic impact of different visitor groups.
- Determine visitor satisfaction levels.

METHODOLOGY

In-person interviews were conducted with 800 randomly selected visitors. Approximately 66 or 67 interviews were conducted each month for 12 months from January through December 2019. 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 in or 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 800 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 observations in one or more years for a particular measure is up (or down), larger (or smaller), etc. we mean that there is a 95% or better chance that the difference is the result of a true difference between the measure compared over these years and is not due to sampling error alone. This is a commonly accepted standard for statistical significance testing in market and public opinion research. We do not note any yearly differences that do not meet this standard for statistical significance.

This report presents the results of the 2019 study and compares them to the results of the 2015, 2016, 2017, and 2018 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 2019, 86% of visitors had visited Laughlin before while 14% were first-time visitors, the largest proportion of first-time visitors observed over the past five years.

FIGURE 1

First Visit Vs. Repeat Visit

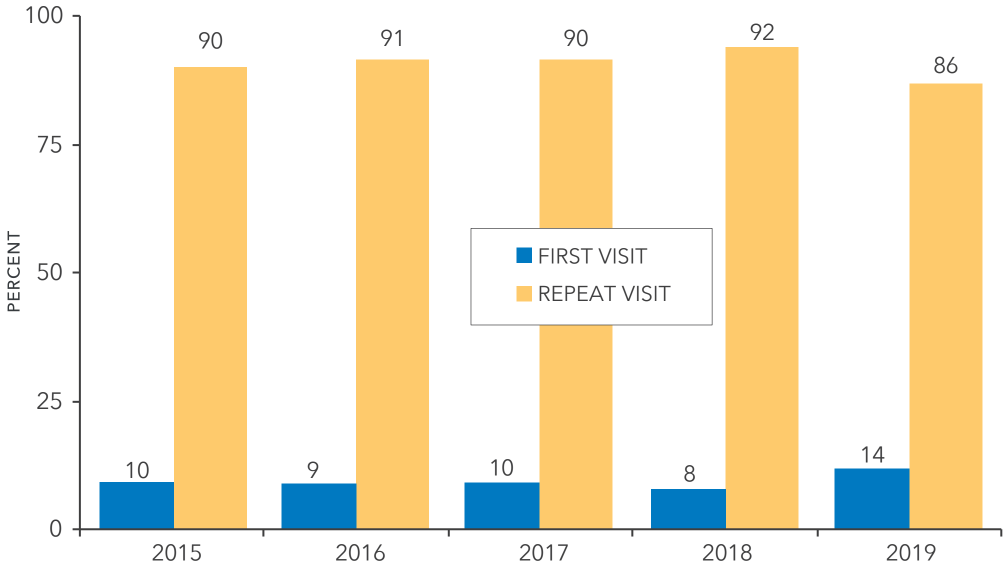
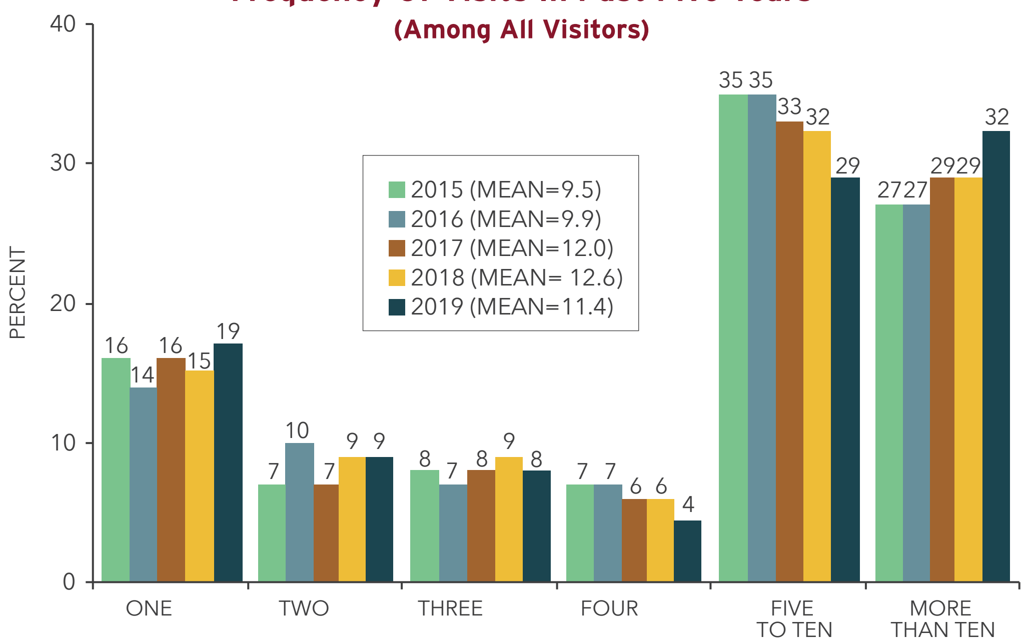


FIGURE 2

Frequency Of Visits In Past Five Years

(Among All Visitors)

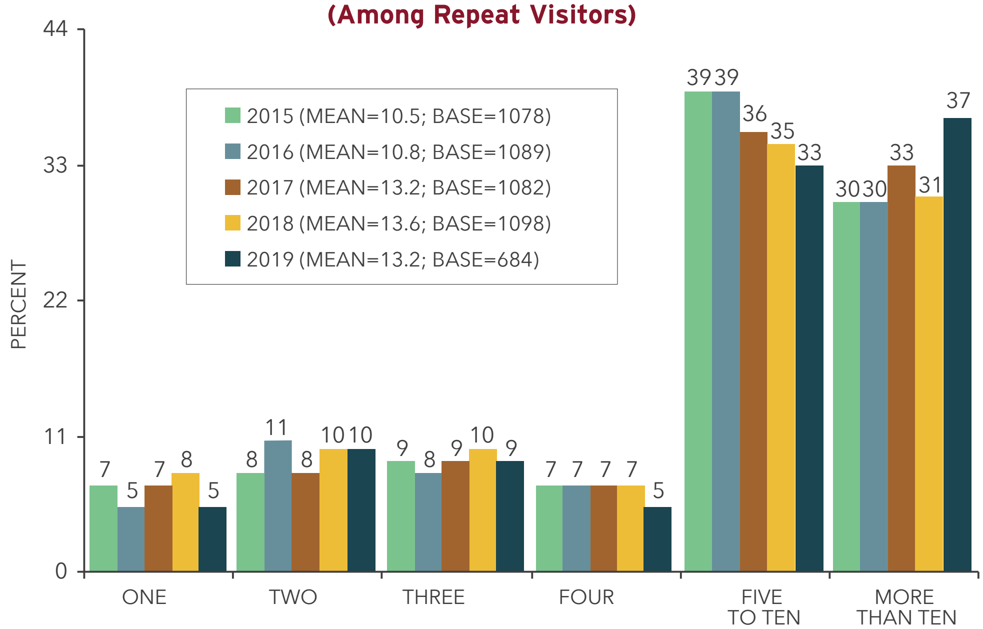


The average number of visits to Laughlin in the past five years among all visitors was 11.4 in 2019, up from 2015 and 2016. Over the past three years Laughlin has attracted a more frequent and/or loyal visitor.

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 13.2, similar since 2017, but an increase from 2015 and 2016.

Among all Laughlin visitors in 2019, the average number of visits in the past year was 3.1, in the same range since 2017, but an increase from 2015 and 2016. Fifty-one percent (51%) said they visited Laughlin only once in the past year, the highest level observed over the past five years.

FIGURE 4

Frequency Of Visits In Past Year

(Among All Visitors)

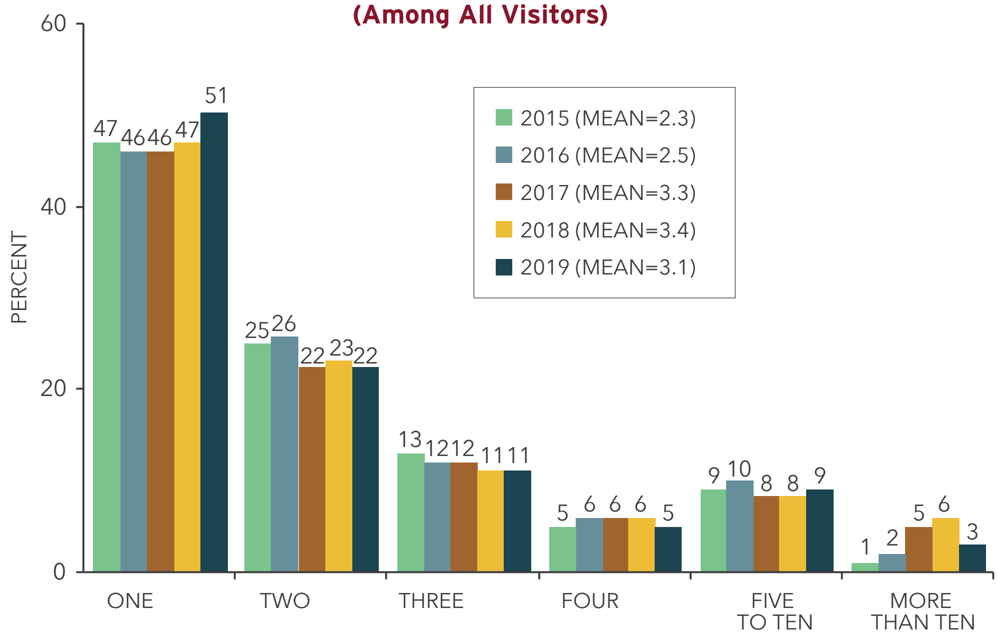
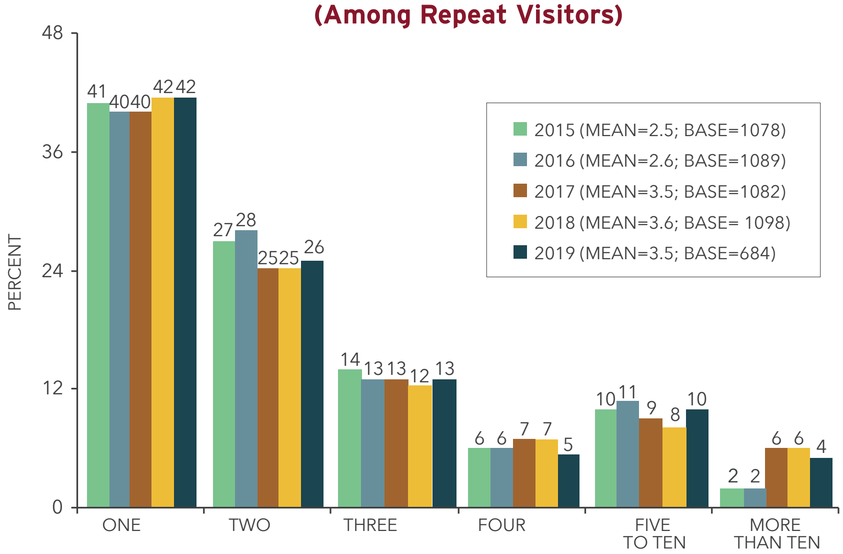


FIGURE 5
Frequency Of Visits In Past Year
(Among Repeat Visitors)



In 2019, repeat visitors made an average of 3.5 trips in the past year to Laughlin, similar over the past three years, but an increase from 2015 and 2016.

Over four in ten (42%) repeat visitors in 2019 said they first came to Laughlin primarily for vacation or pleasure, the highest proportion observed over the past five years. Twenty-eight percent (28%) of repeat visitors in 2019 first came to Laughlin primarily to gamble, similar over the past three years, but down from 2015 and 2016. Nearly one-seventh (13%) of repeat visitors first came to Laughlin to visit friends or relatives, down from a high of 20% in 2016. Five percent (5%) of repeat visitors first visited Laughlin primarily for water-based recreation, the lowest proportion observed over the past five years. Five percent (5%) first visited for a special event, unchanged from last year, and only 4% said they first visited Laughlin while just passing through, the lowest proportion over the past five years.

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

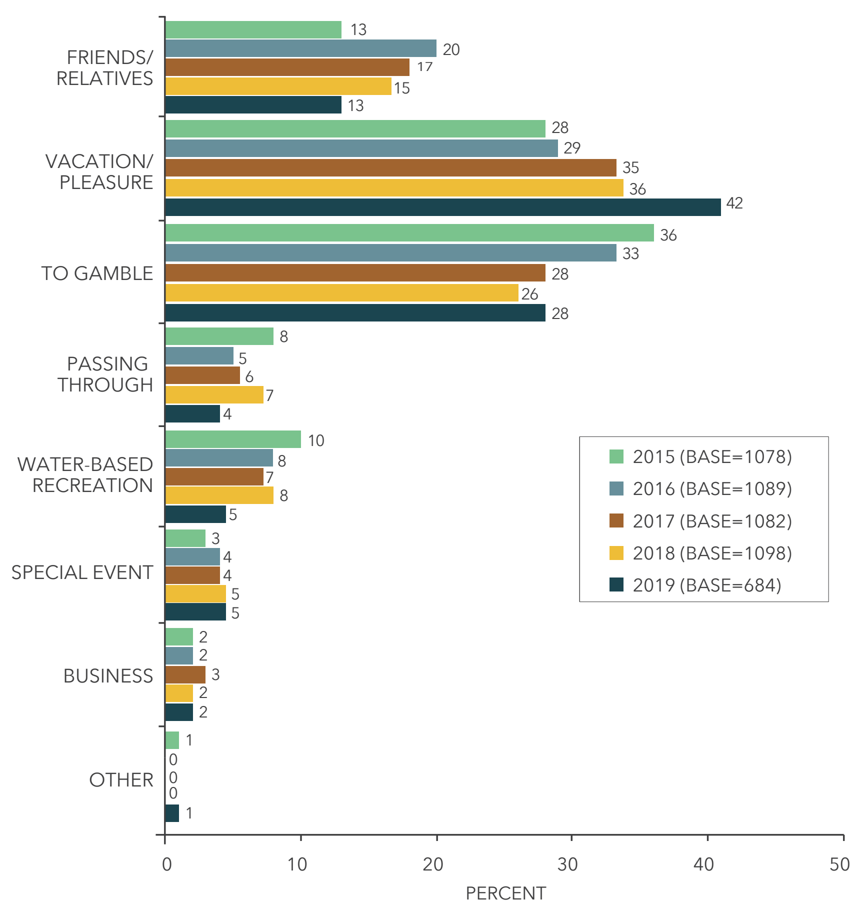
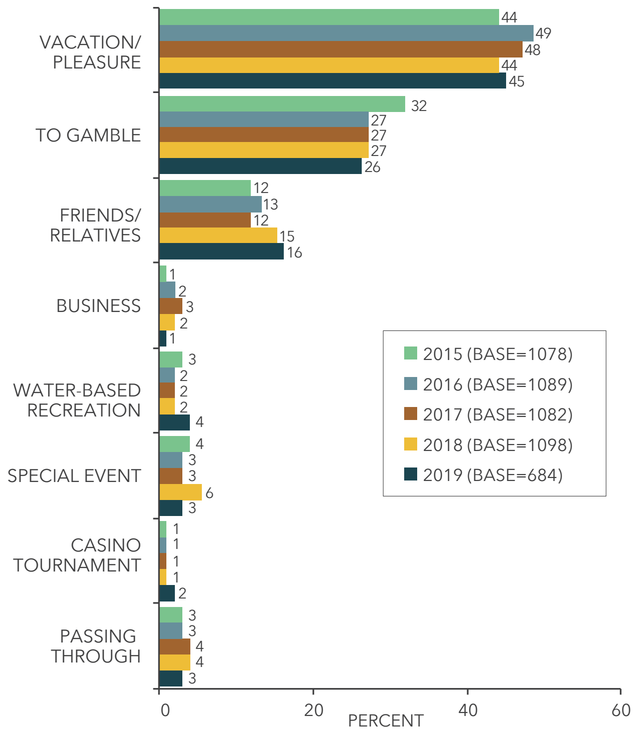


FIGURE 7

Primary Purpose Of Current Visit
(Among Repeat Visitors)



The primary purpose of this trip to Laughlin among repeat visitors has been quite similar over the past five years. About one-half (45%) of repeat visitors said the primary purpose of this trip to Laughlin was vacation or pleasure and 26% came to Laughlin primarily to gamble on this visit, down from the high of 32% in 2015. Another 16% of repeat visitors said the primary purpose of their current trip was to visit friends or relatives, the highest proportion observed over the past five years. Four percent (4%) of repeat visitors said the primary purpose of their current trip to Laughlin was for water-based recreation, also the highest proportion observed over the past five years, while 3% were visiting primarily to attend a special event, down from 6% in 2018. Smaller proportions of repeat visitors said the primary purpose of their current trip to Laughlin was for business (1%), a casino tournament (2%), or just passing through (3%), about the same over the past five years.

The primary purpose of this trip to Laughlin among all visitors has been quite similar over the past five years. Nearly one-half (45%) of all visitors to Laughlin in 2019 said the primary purpose of their current trip was for vacation or pleasure and another one-fourth (24%) were there primarily to gamble, down from 30% in 2015. One in six (17%) of all visitors were in Laughlin primarily to visit friends or relatives, the highest proportion in the past 5 years. Three percent (3%) of all visitors were in Laughlin to attend a special event, down from 5% in 2018. Smaller proportions of all visitors said the primary purpose of their current trip to Laughlin was for business (1%), water-based recreation (3%), just passing through (3%), or a casino tournament (1%), about the same over the past few years.

FIGURE 8

Primary Purpose Of Current Visit
(Among All Visitors)

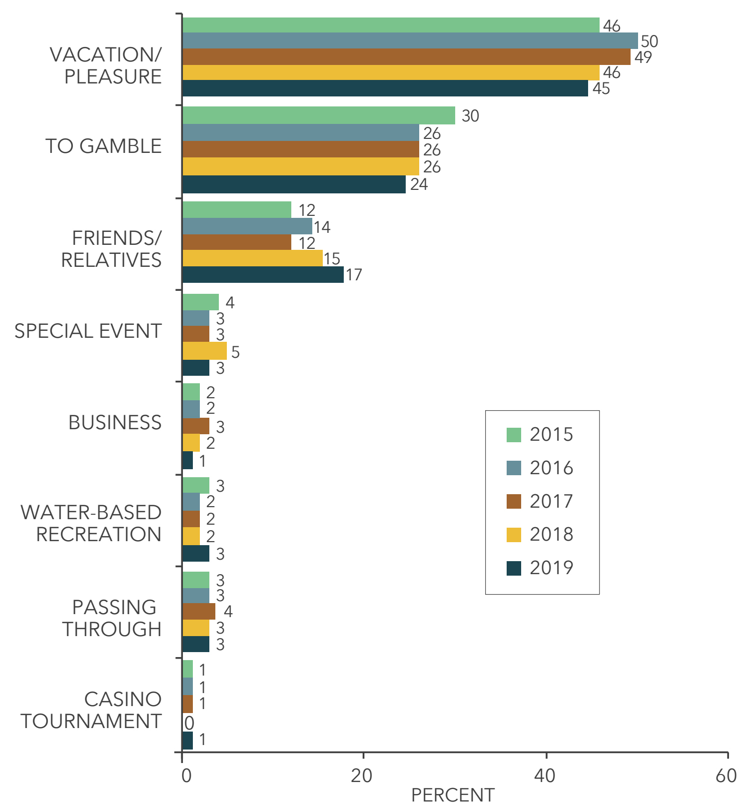
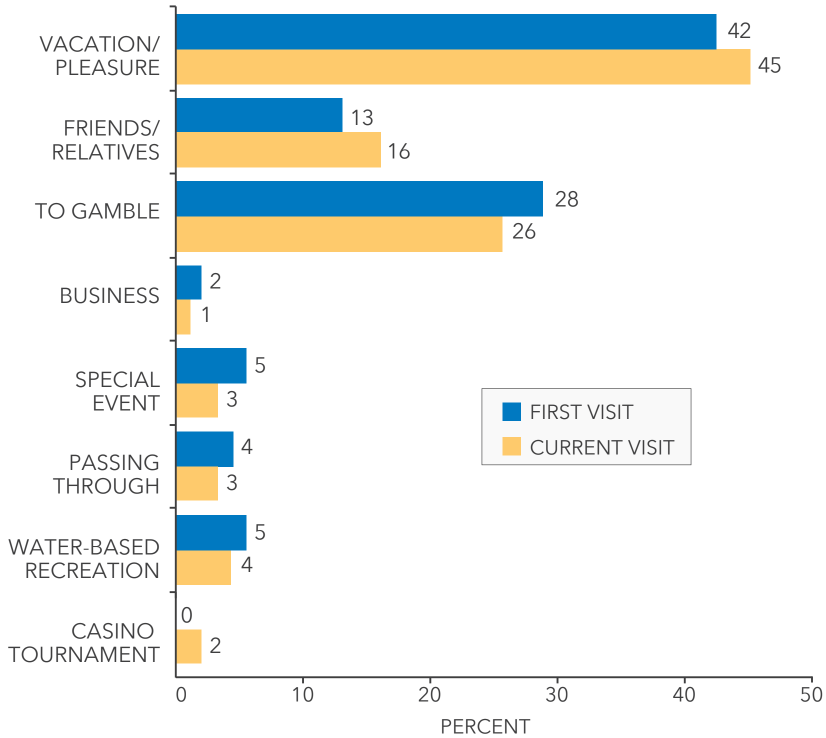


FIGURE 9

Primary Purpose Of First Visit Vs. Current Visit – 2019

(Among Repeat Visitors)



This figure compares the primary purpose given by repeat visitors for their first visit to Laughlin versus the primary reason for their current visit in 2019. The primary reason profiles for first and current visits among repeat visitors are quite similar and the slight differences in these profiles do not pass statistical significance testing to conclude that they are different.

Here is a comparison of first-time visitors with repeat visitors in terms of the primary purpose of their current visit to Laughlin in 2019. Repeat visitors were significantly more likely than first-time Laughlin visitors to say the primary purpose of their current visit was to gamble (26% vs. 15% for first-time visitors). First-time visitors were significantly more likely than repeat visitors to say the primary purpose of their current visit was to visit friends or relatives (23% vs. 16% for repeat visitors) or they were just passing through (7% vs. 3% for repeat visitors).

FIGURE 10

Primary Purpose Of Current Visit – 2019

(First-Time Vs. Repeat Visitors)

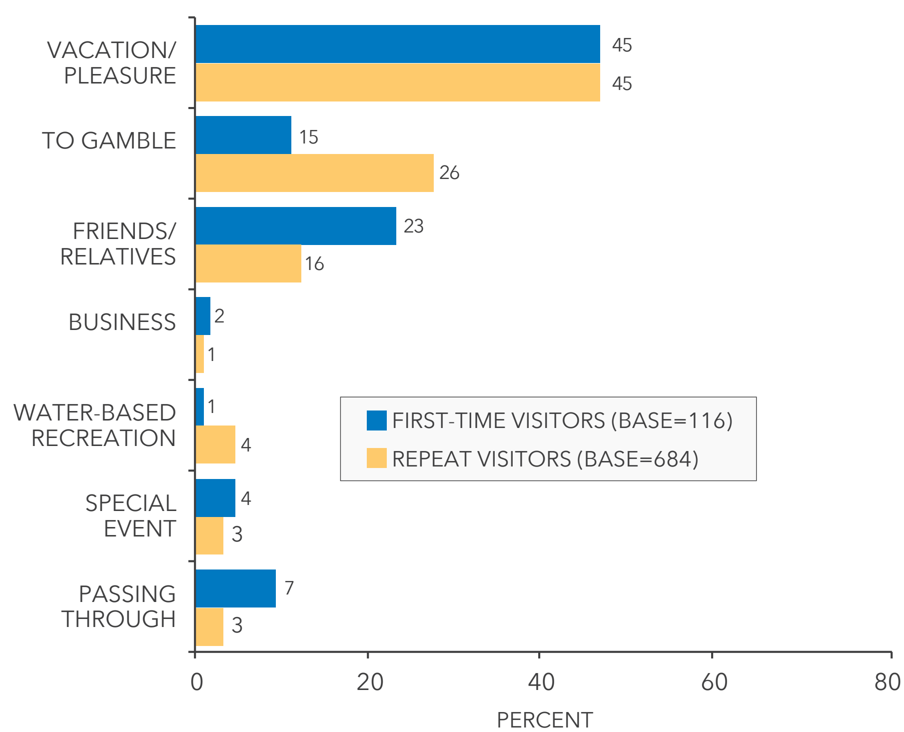
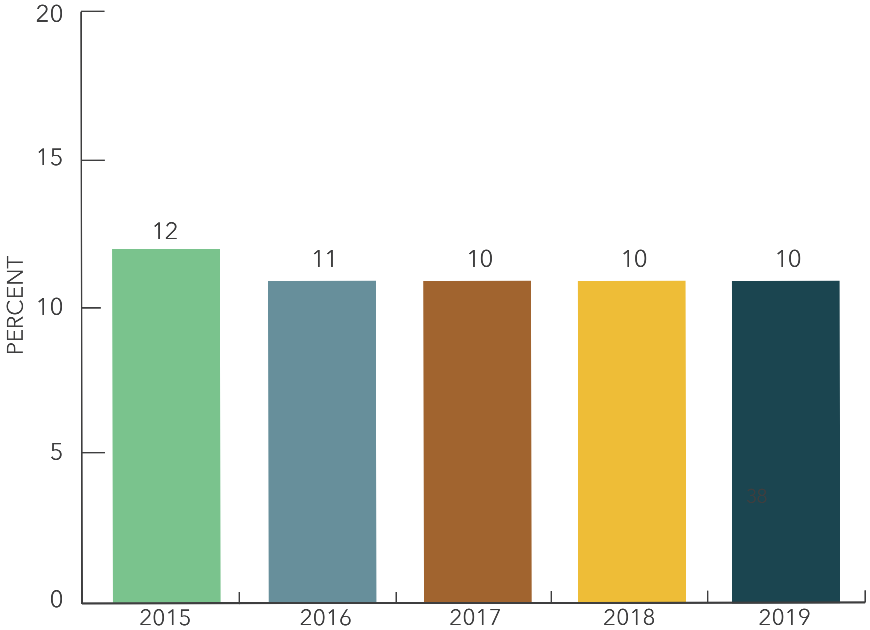
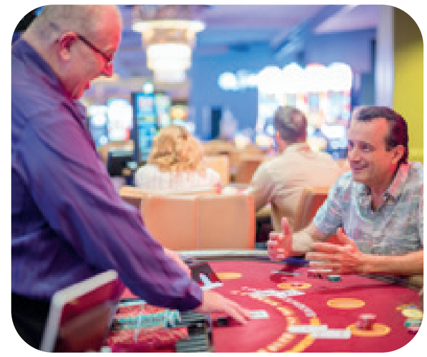


FIGURE 11
Gaming Tournaments*



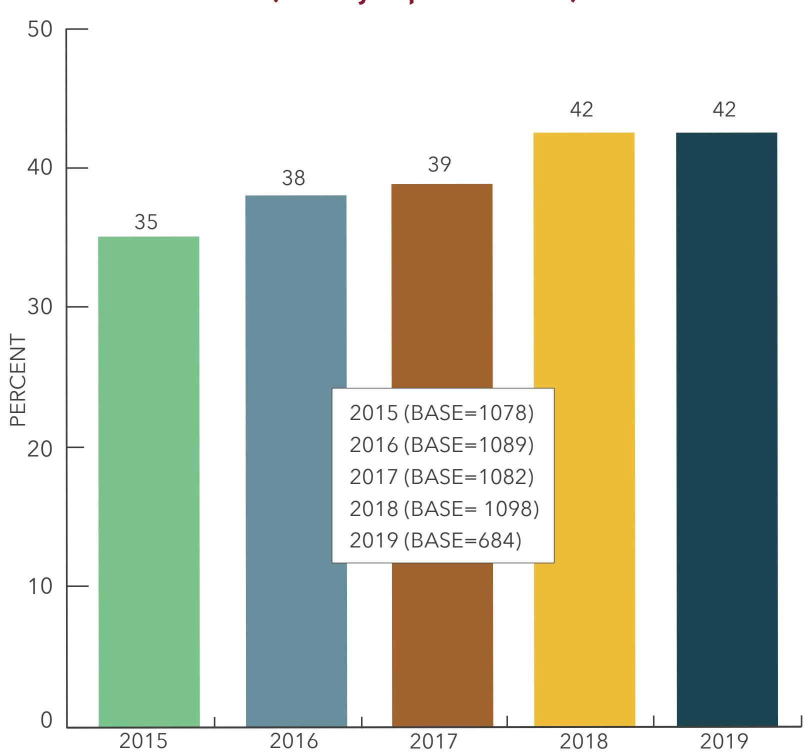
*Only "yes" responses are reported in this chart.

In 2019, 10% of Laughlin visitors said they planned to participate in a gaming tournament in Laughlin, very similar over the past five years.



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. In 2019, 42% said they had, the same as last year but up from 2015 (35%).

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



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

TRAVEL PLANNING

While travel planning varied broadly in 2019 there was a slight decrease in further out planning as only 11% planned their trip more than 90 days in advance, the lowest proportion in the past five years. Thirteen percent (13%) of Laughlin visitors planned their trip within a week of visiting, down from 2017 (19%). Forty-six percent (46%) planned their trip between 7-30 days of their visit, up from last year (40%), and about four in ten (42%) planned their trip more than 30 days in advance, down from last year (46%).

FIGURE 13

Advance Travel Planning

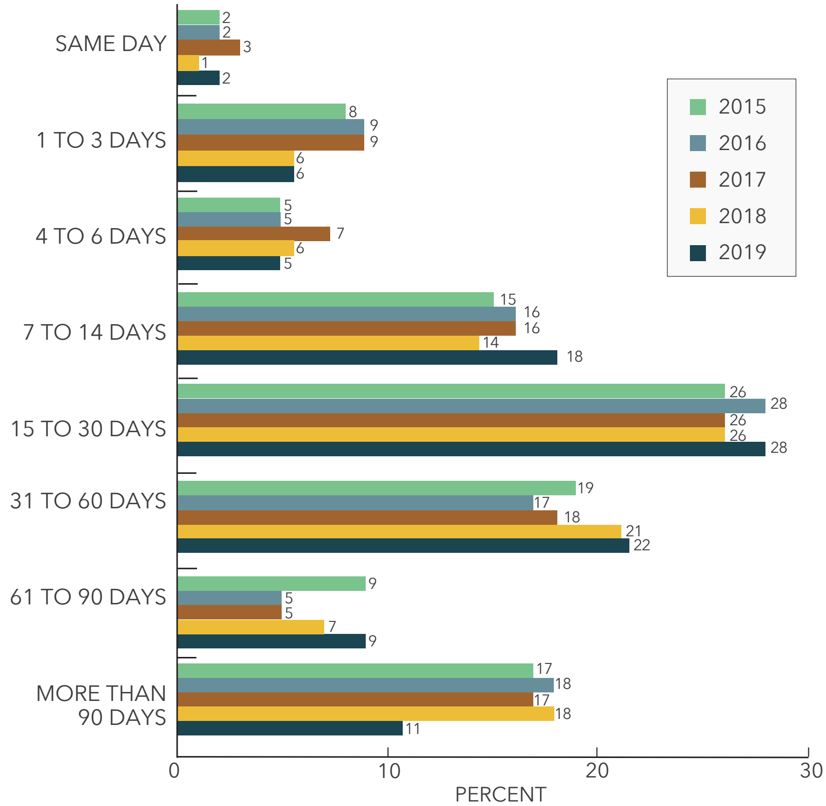
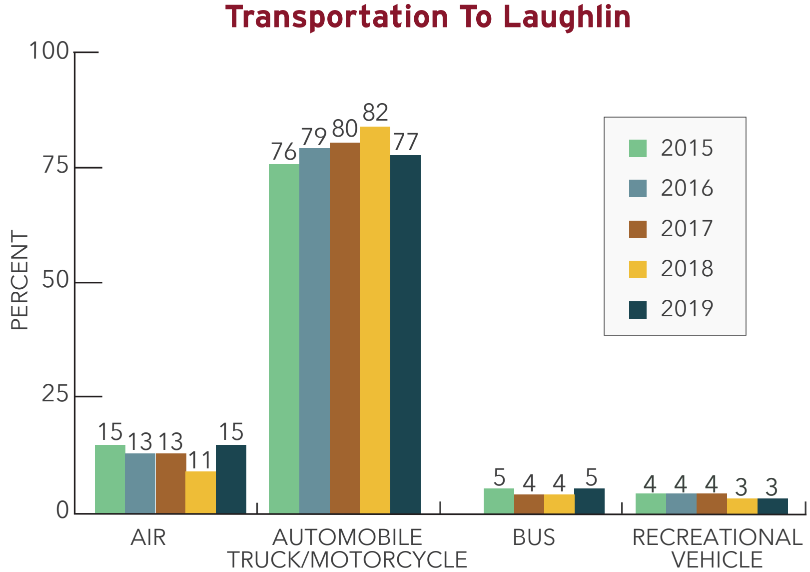


FIGURE 14

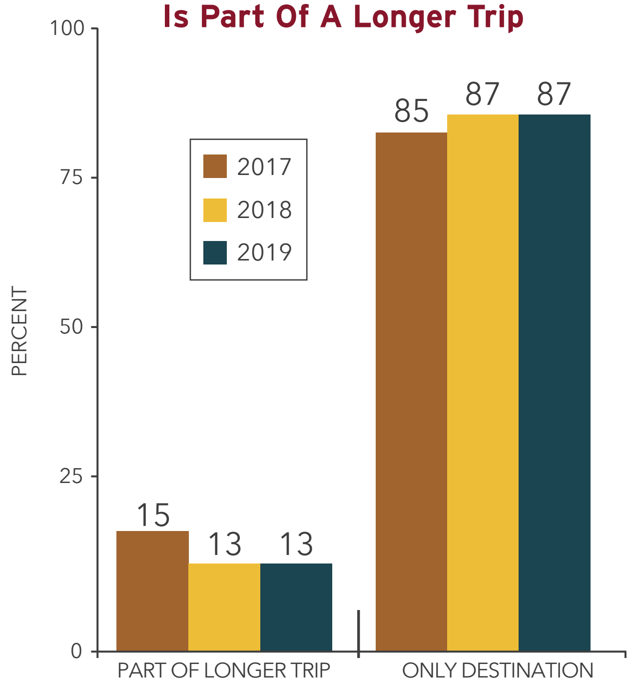
Transportation To Laughlin



In 2019, most Laughlin visitors continued to travel to Laughlin by automobile, truck or motorcycle (77%), down from last year (82%). Fifteen percent (15%) said they came by air, up from last year (11%), 5% traveled by bus, and 3% came to Laughlin in an RV.

FIGURE 15

Whether Laughlin Visit Is Part Of A Longer Trip

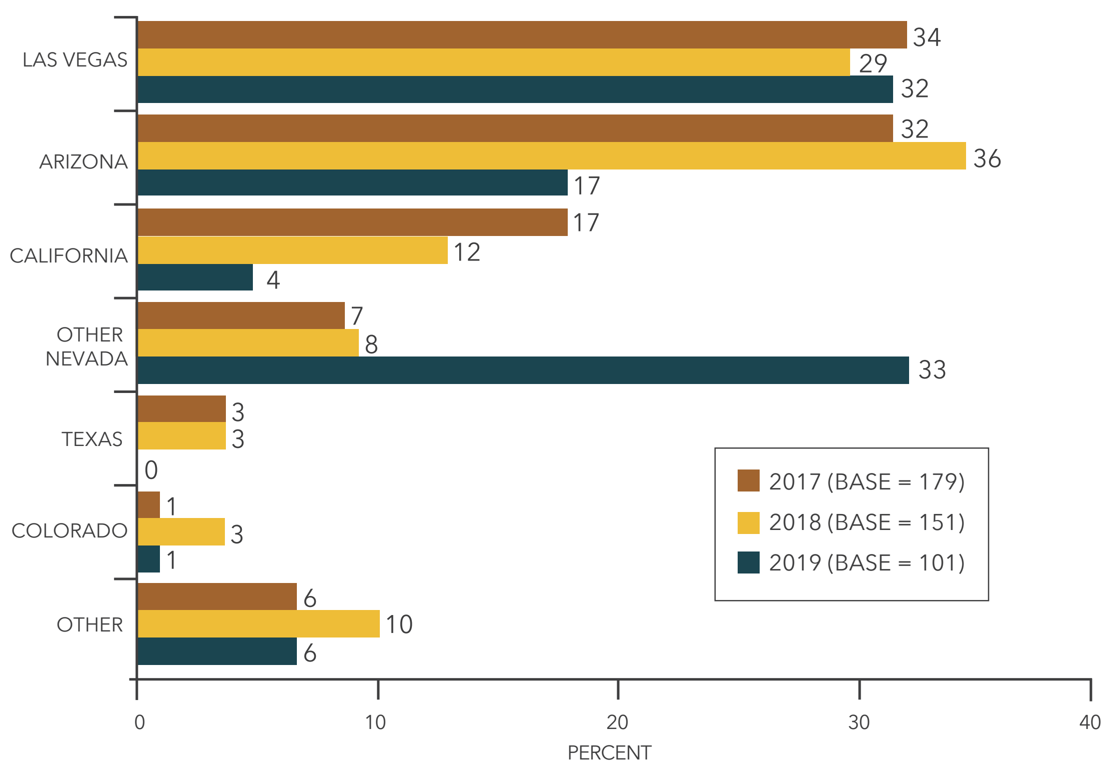


Beginning in 2017 visitors were asked whether their visit to Laughlin was part of a longer trip or if Laughlin was their only destination. In 2019, 87% said Laughlin was their only destination for their trip, the same as in 2018.

FIGURE 16

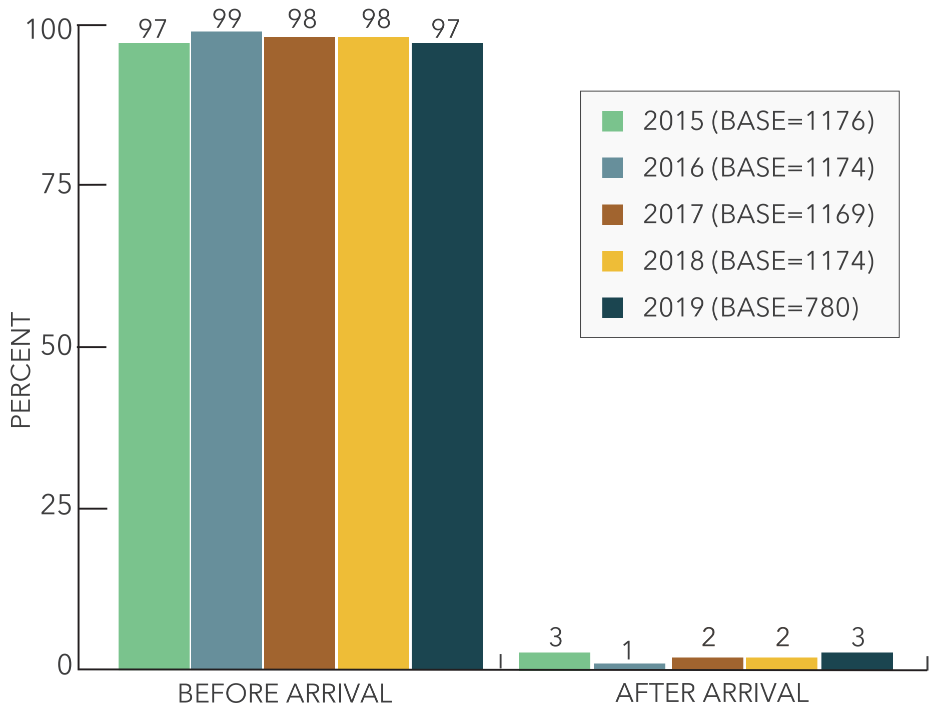
Primary Destination Of Trip

(Among Those On A Longer, Multi-Destination Trip)



Among those travelers who visited Laughlin in 2019 as part of a longer trip the primary destination for about two-thirds of them was either Las Vegas (32%) or somewhere else in Nevada (33%), up from the past two years. Another 17% of these visitors had a primary destination of somewhere in Arizona, down from the past two years, with smaller proportions traveling to other places in California (4%), or Colorado (1%).

FIGURE 17
When Decided Where To Stay
(Among Those Who Stayed Overnight)

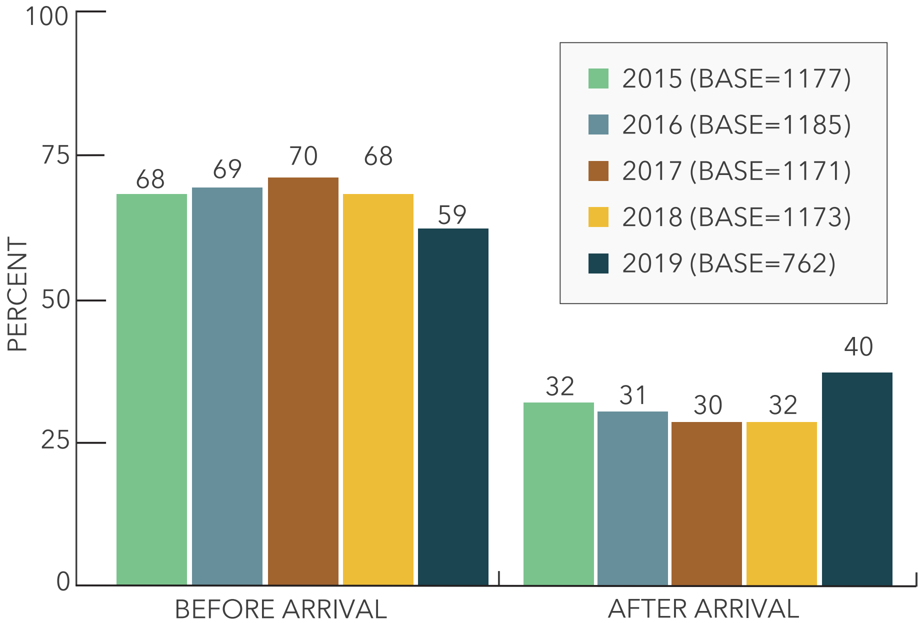


Almost all (97%) of Laughlin overnight visitors in 2019 decided where to stay in Laughlin prior to their visit, about the same over the past five years.

FIGURE 18

When Decided Where To Gamble

(Among Those Who Gambled)



Forty percent (40%) of Laughlin gamblers said they made their decision about where to gamble after arriving, the highest proportion observed over the past five years. About six in ten (59%) Laughlin visitors who gambled during their visit said they made their decision about where to gamble before they arrived in Laughlin.

Among visitors who reported going to a show, about one-half (53%) said they decided on what shows to see before their arrival in Laughlin, down from two-thirds (67%) last year. About one-half (45%) of show goers said they decided on what shows to see after their arrival in Laughlin, up from last year (33%).

FIGURE 19

When Decided Which Shows To See

(Among Those Who Saw Shows)

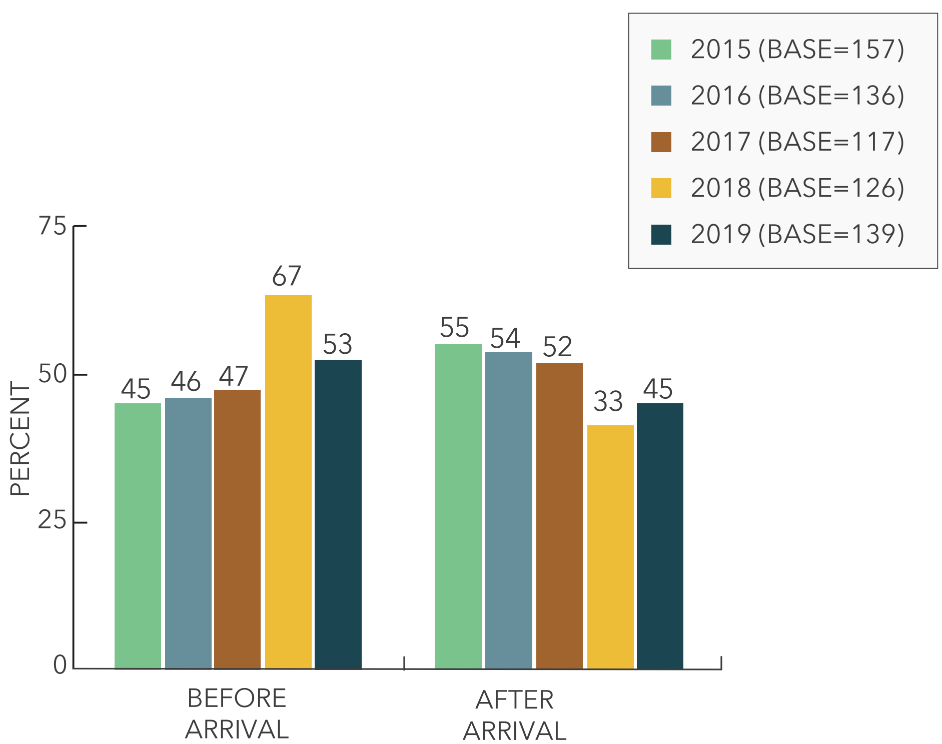
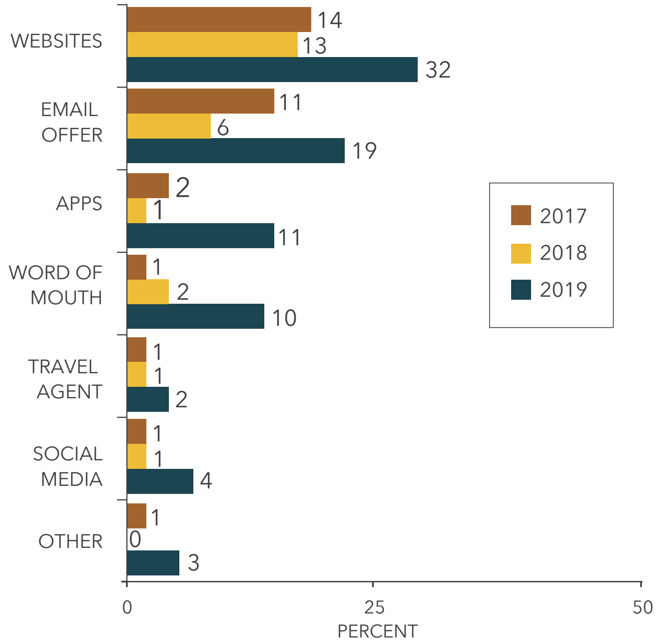


FIGURE 20

Tools Used In Planning Trip To Laughlin*



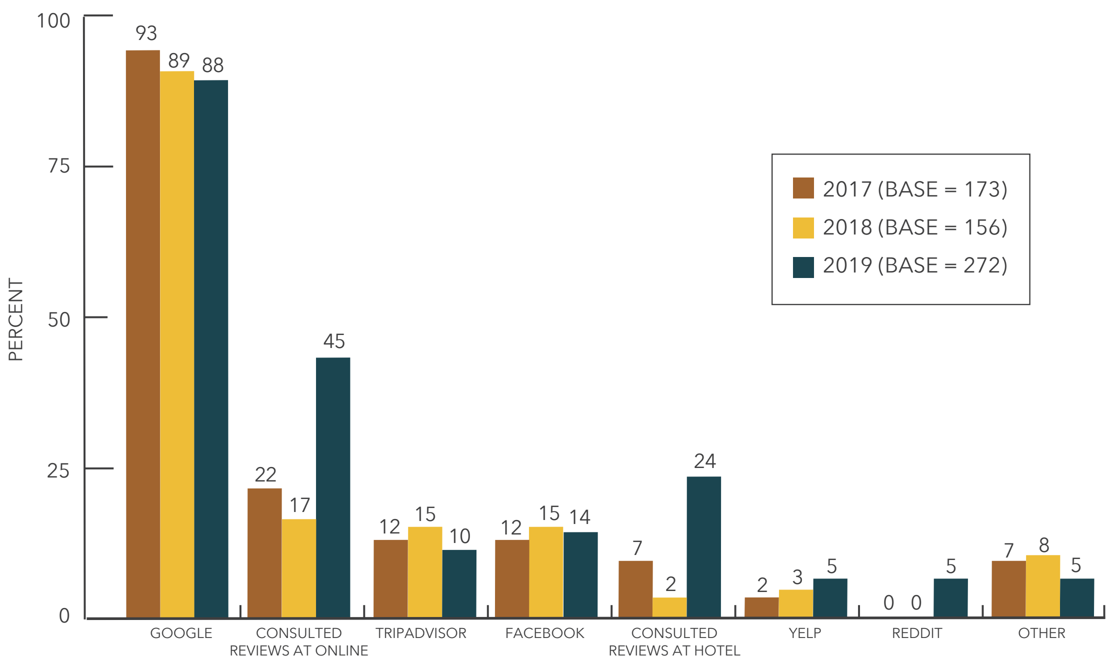
*Multiple responses were permitted to this question.

Beginning in 2017 visitors to Laughlin were asked about their use of several specific tools in planning the trip. In 2019, usage of all tools with the exception of travel agents increased over 2017 and 2018 levels.

FIGURE 21

Social Media, Travel Review Apps Or Websites Used In Planning Trip To Laughlin

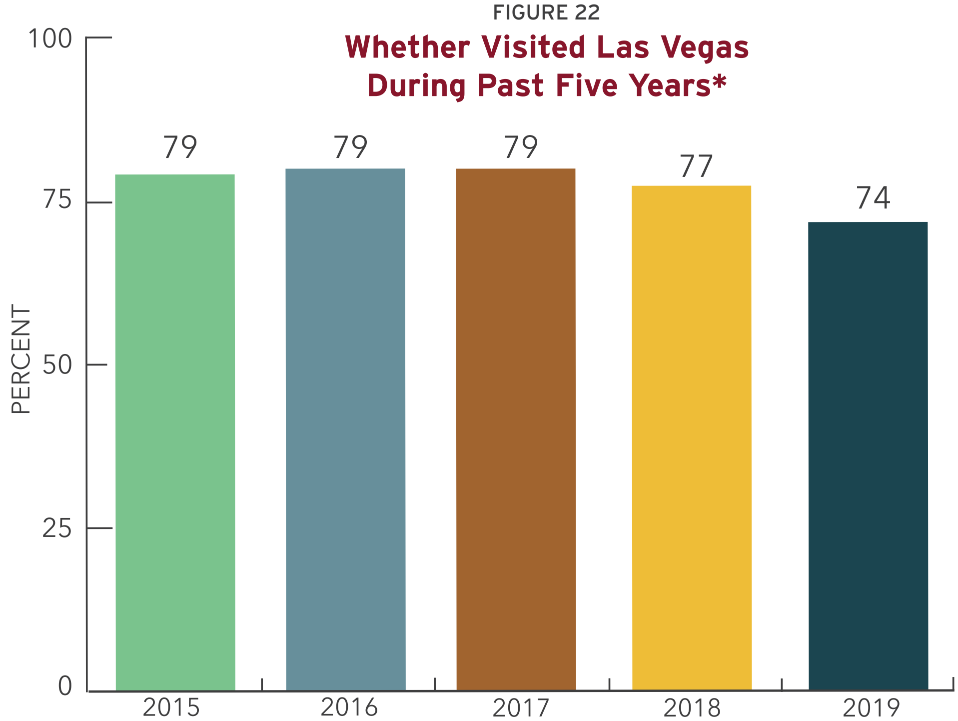
(Among Visitors Who Used Such Tools In Planning Their Trip)



Beginning in 2017, visitors who used social media, travel review apps, or websites to plan their trip to Laughlin were also asked to indicate if they used specific media, apps, and/or websites. Similar to past years, in 2019, nine in ten (88%) of these visitors used Google. However, usage of reviews at online travel agencies (45%) and/or reviews at hotel or show venue sites (24%) increased substantially over the past two years.

FIGURE 22

Whether Visited Las Vegas During Past Five Years*



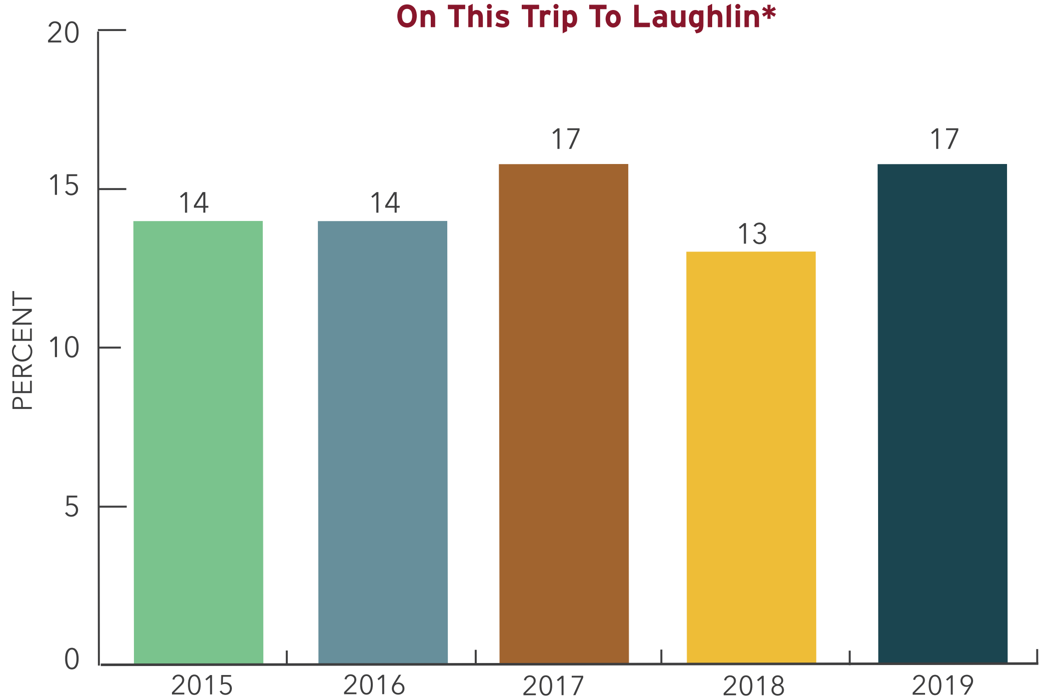
*Only "yes" responses are reported in this chart.

In 2019, 74% of Laughlin visitors said they have visited Las Vegas within the past five years, down slightly from 2015 to 2017.

About one in six (17%) Laughlin visitors in 2019 said they had visited Las Vegas or were planning to visit Las Vegas on this trip, back up from 2018 (13%), and the same as in 2017.

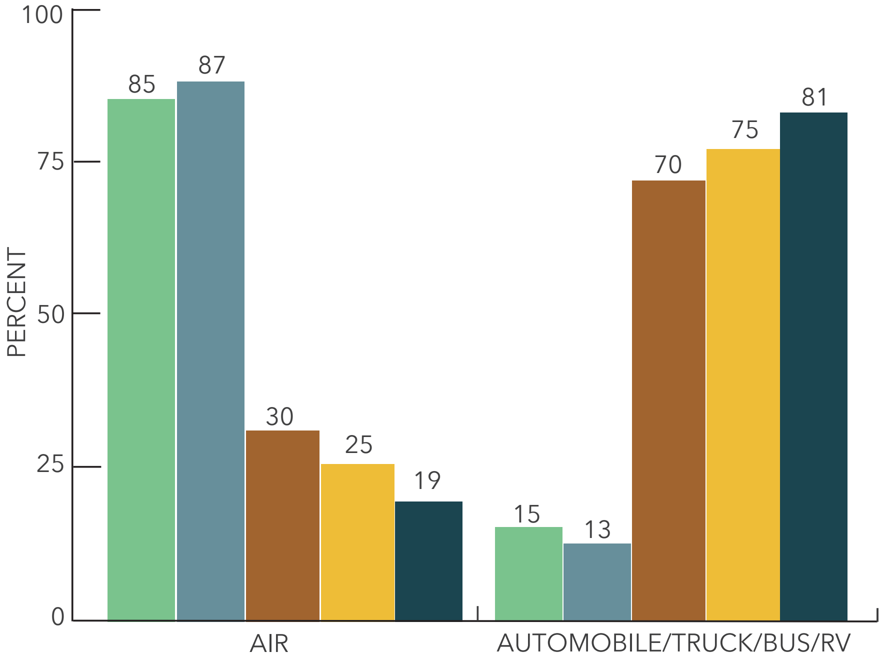
FIGURE 23

Visiting Las Vegas On This Trip To Laughlin*



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

FIGURE 24
Transportation To Las Vegas*



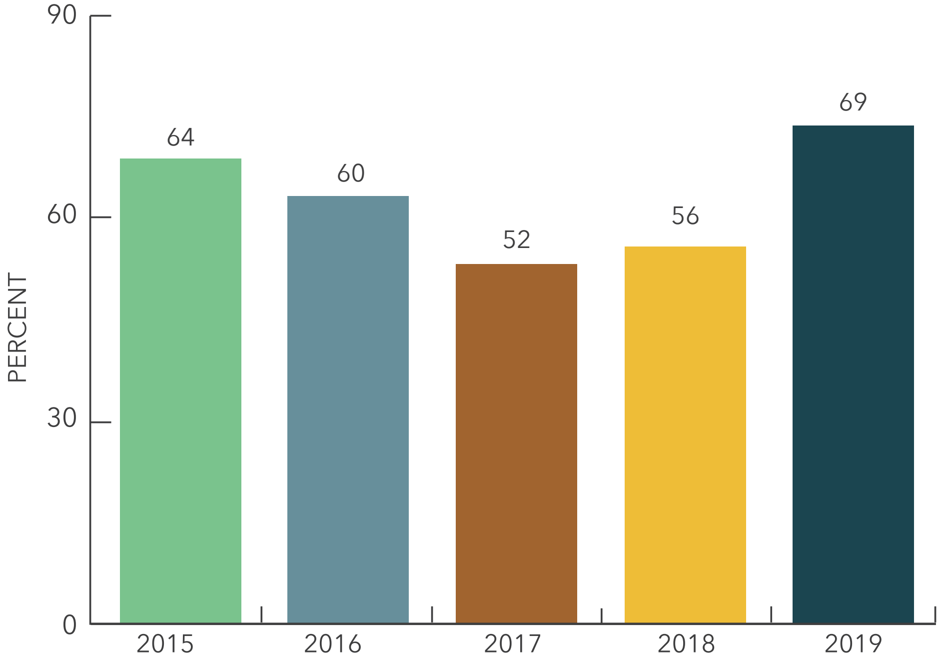
*From 2015 through 2016 this question was asked only of those visitors who traveled to Laughlin from Las Vegas. Please note small base sizes.

Laughlin visitors who will or did visit Las Vegas before or after their visit to Laughlin were asked how they traveled to Las Vegas. One fifth (19%) of these visitors said they traveled by air, down from the 2015 to 2017 time period. Eighty-one percent (81%) said they traveled via some type of ground transportation.

FIGURE 25

Visiting Downtown Las Vegas*

(Among Those Who Visited Or Plan To Visit Las Vegas)



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

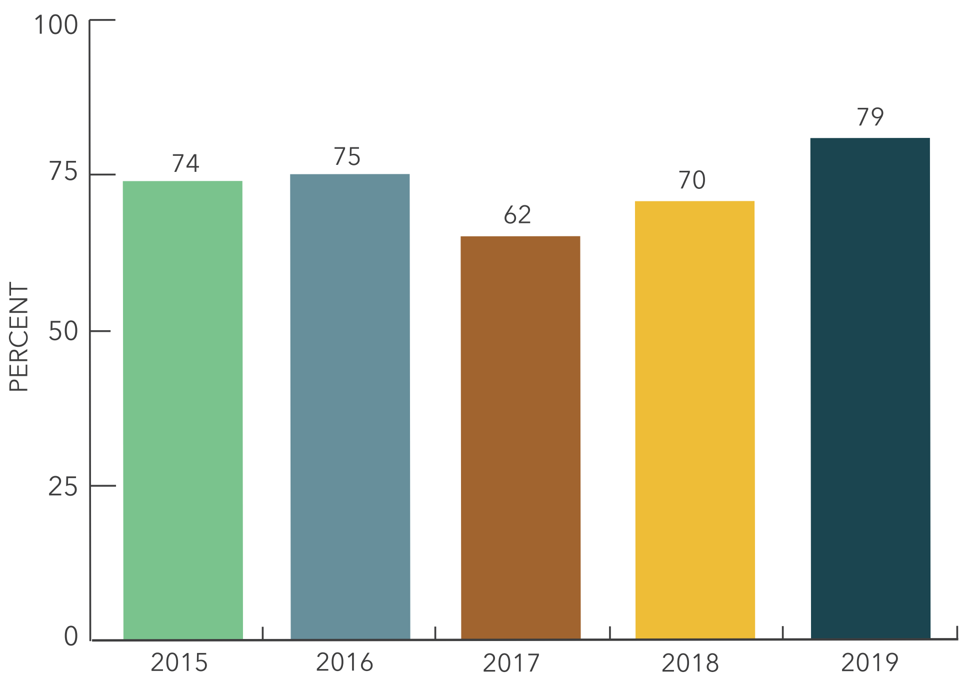
Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, nearly seven in ten (69%) said they had visited or were intending to visit Downtown, up from the past two years.

Among Laughlin visitors who visited or were planning to visit Las Vegas on this trip, about eight in ten (79%) said they had visited or were intending to visit the Strip, also up from the past two years.

FIGURE 26

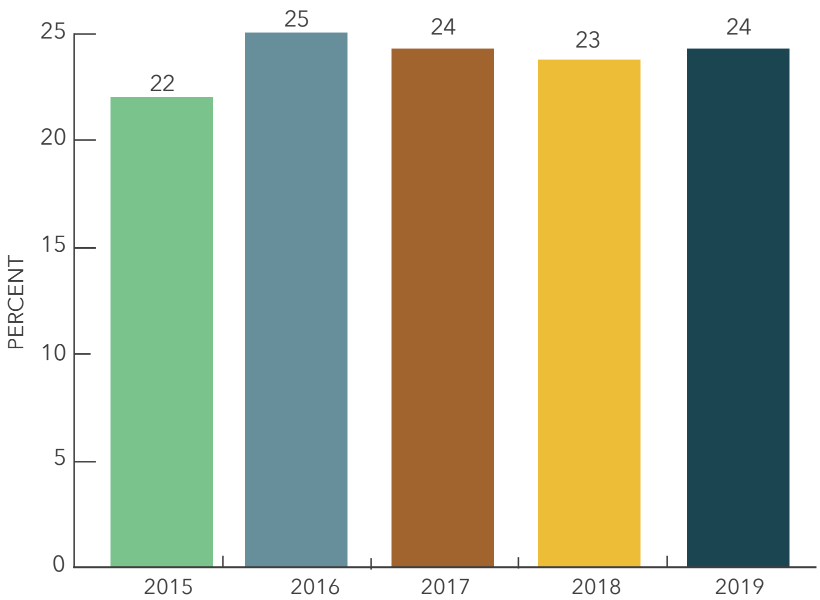
Visiting The Las Vegas Strip*

(Among Those Who Visited Or Plan To Visit Las Vegas)



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

FIGURE 27
Touring Other Nearby Places*
(Among All Visitors)

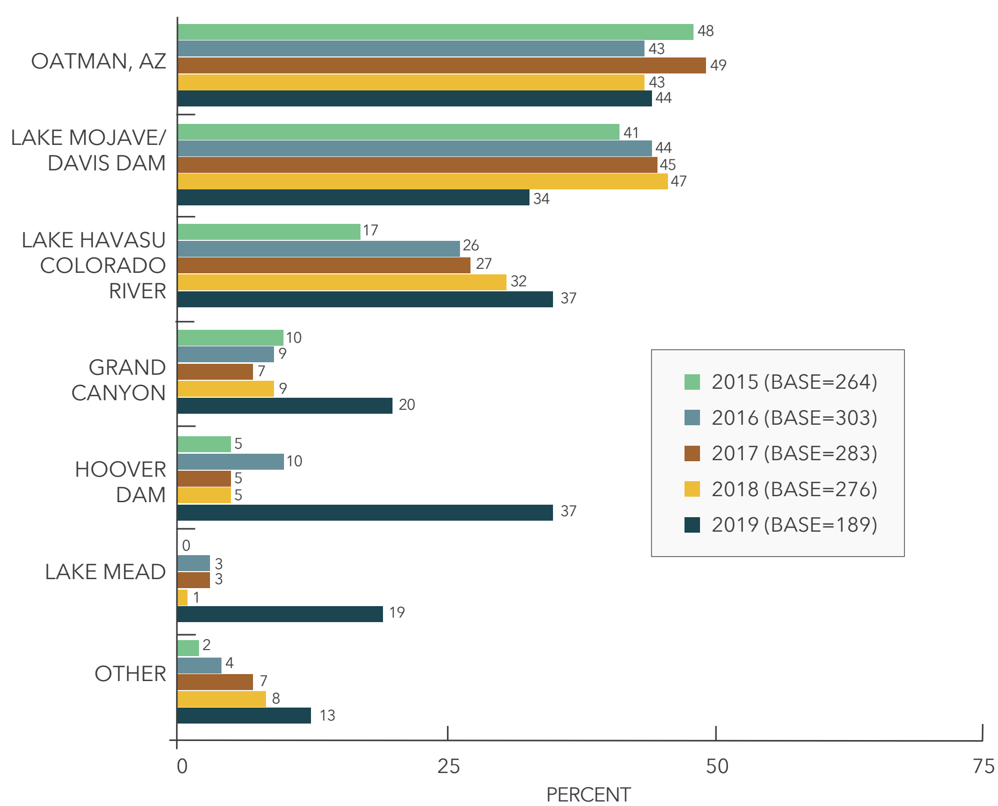


*Only "yes" responses are reported in this chart.

In 2019, one quarter (24%) of Laughlin visitors said they had visited or planned to visit other nearby areas besides Las Vegas, about the same over the past five years.

Laughlin visitors who said they visited or planned to visit nearby places in 2019 were most likely to have said Oatman (44%), in the same range over the past five years. Over one-third (37%) of these visitors said the Lake Havasu/Colorado River area, up from a low of 17% in 2015. Several places spiked up to their highest proportions over the past five years including Hoover Dam (37%), the Grand Canyon (20%), and Lake Mead (19%).

FIGURE 28
Other Nearby Places Visited*
(Among Those Who Visited Nearby Places)



*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. In 2019, over three quarters (78%) of them reported two adults in their party, up from 71% in 2017. Twelve percent (12%) said they were traveling alone, the same as last year. On average there were 2.0 adults in their immediate party, down from 2.2 adults in 2015 and 2017.

FIGURE 29

Adults In Immediate Party

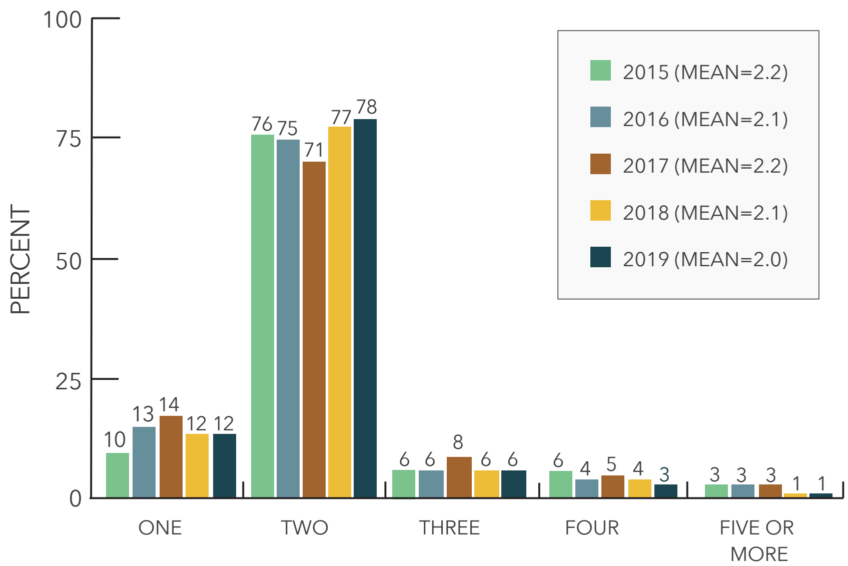
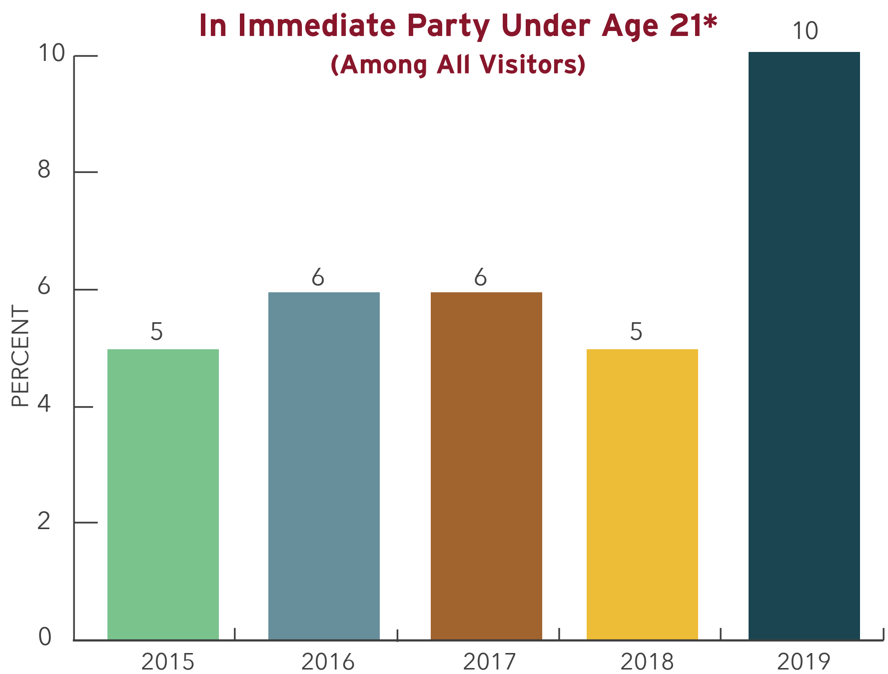


FIGURE 30

Whether Had Persons In Immediate Party Under Age 21*

(Among All Visitors)



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

We also asked visitors whether they had any people under the age of 21 traveling with them in their immediate party and 10% said yes, the highest proportion over the past five years.

During 2019, Laughlin visitors stayed an average of 3.3 nights and 4.3 days, with 41% spending four days and staying overnight three nights, the highest proportion observed over the past five years.

FIGURE 31

Nights Stayed

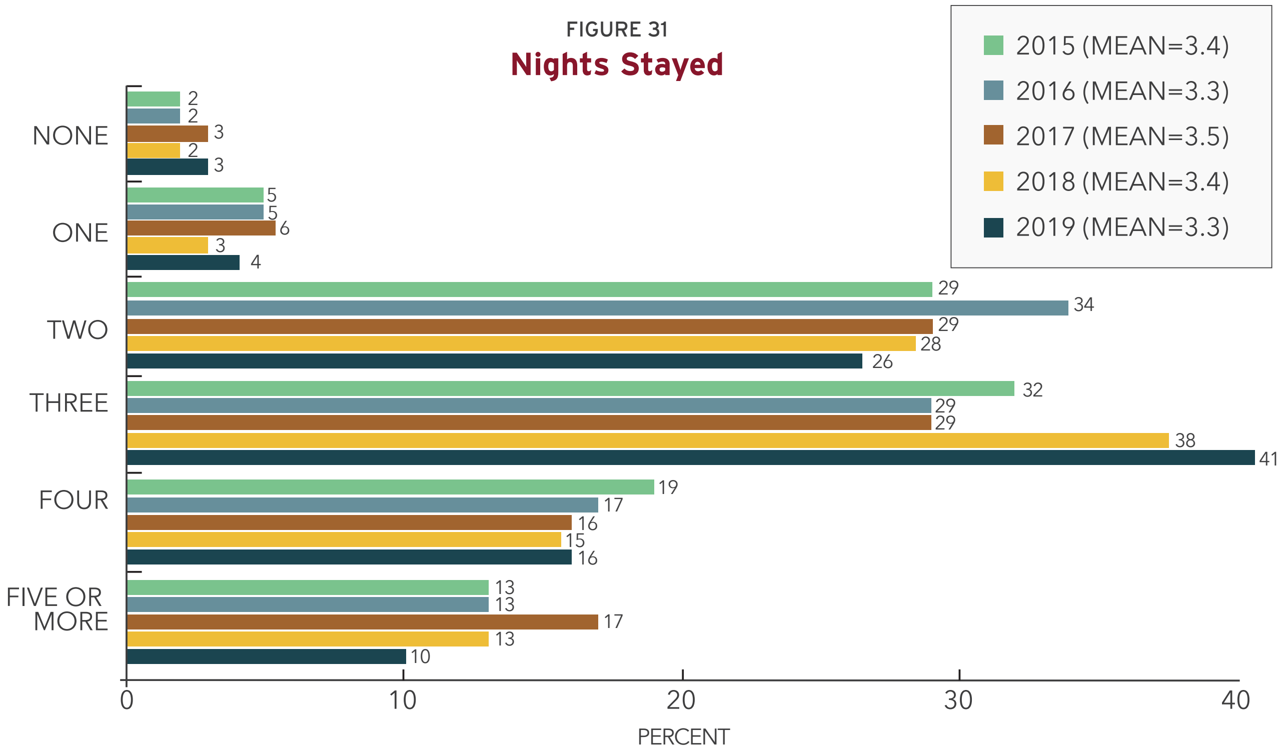


FIGURE 32

Days Stayed

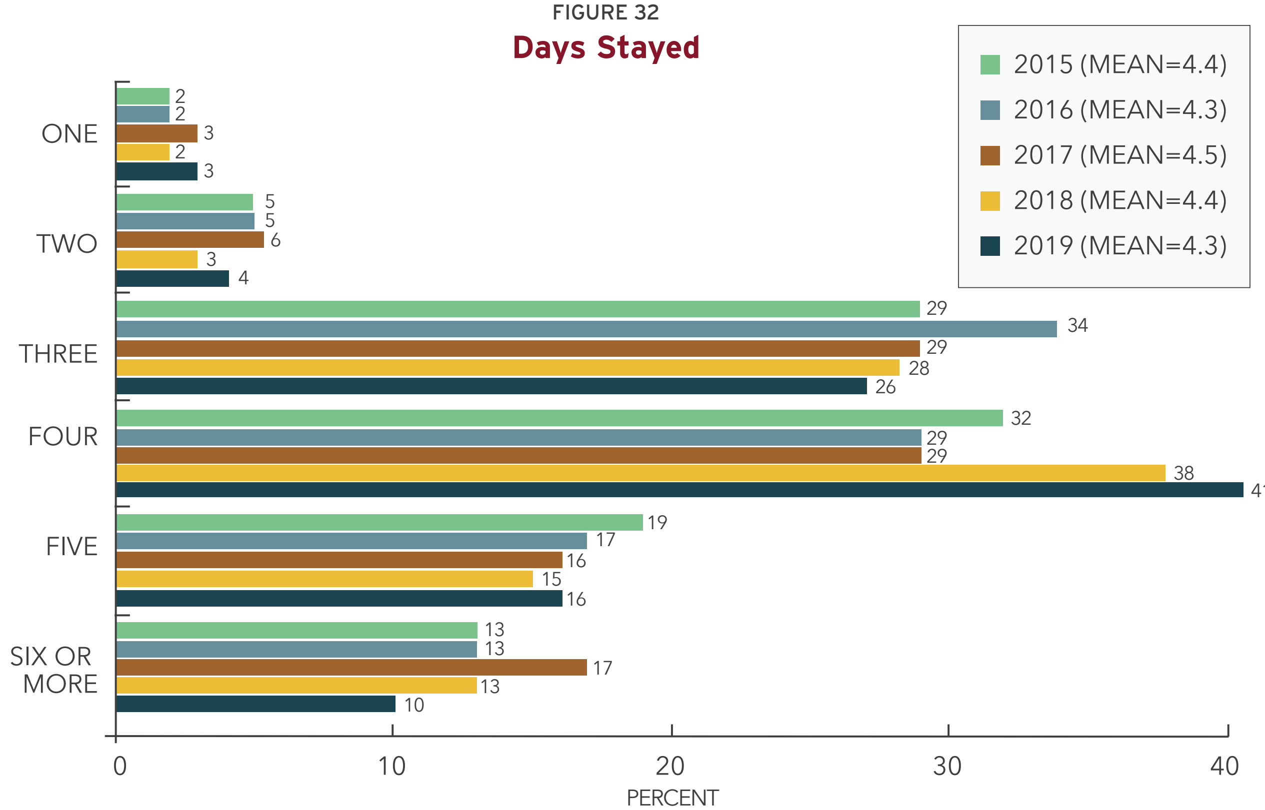
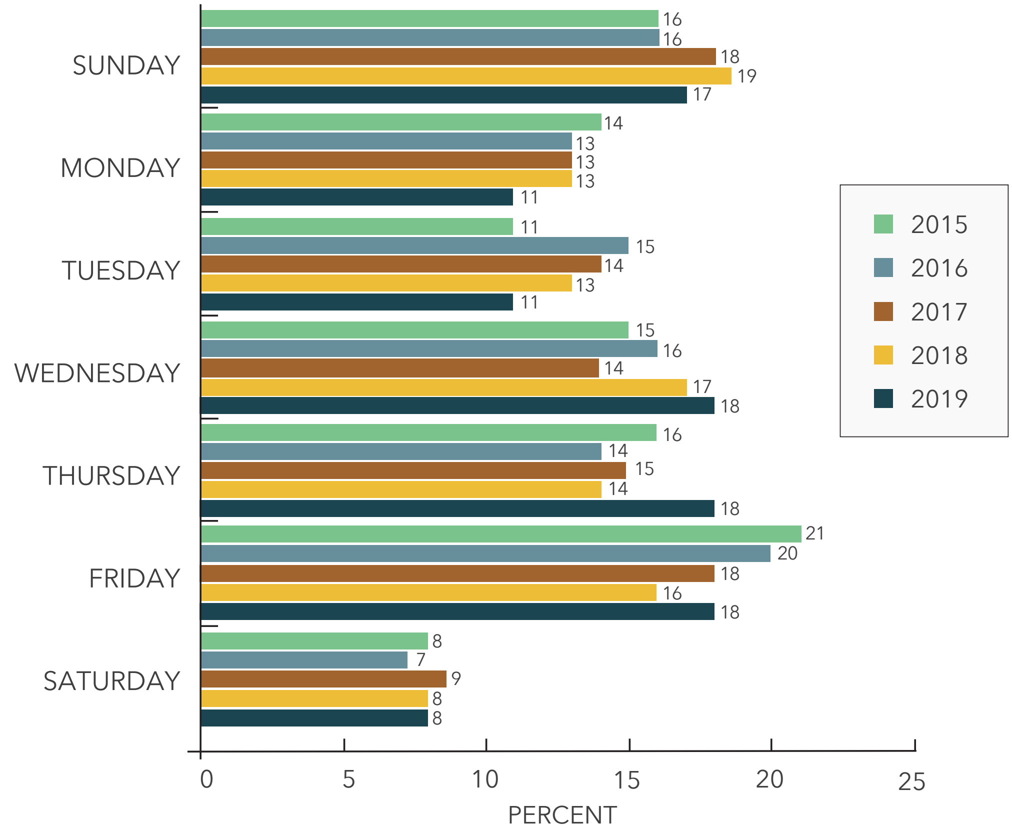


FIGURE 33

Day of Arrival

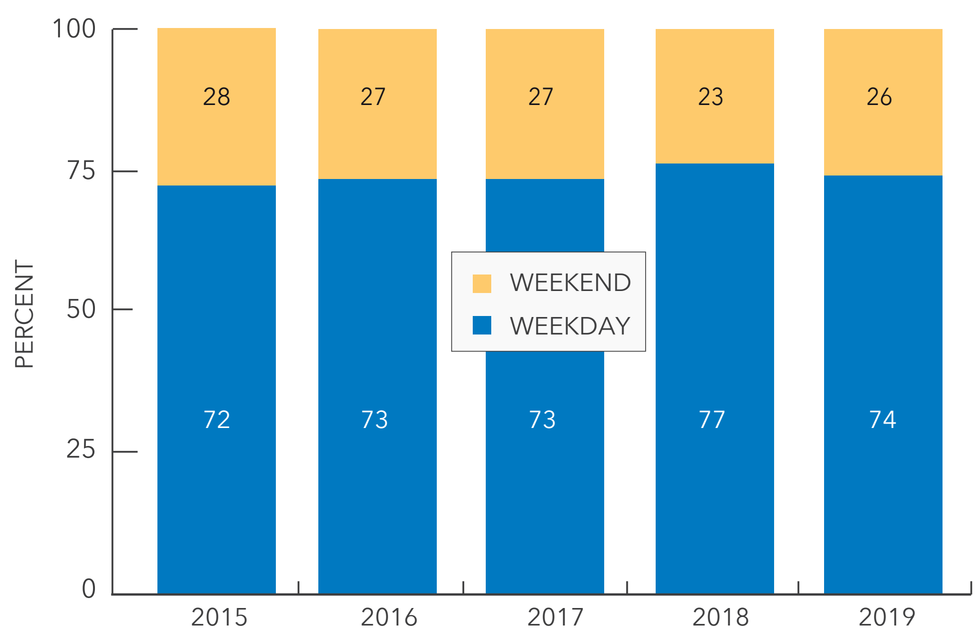


Visitors to Laughlin in 2019 were most likely to arrive from Wednesday through Friday (each at 18%).

In 2019, 74% of visitors arrived in Laughlin on a weekday (Sunday through Thursday), in the same range over the past five years.

FIGURE 34

Weekend Versus Weekday Arrival

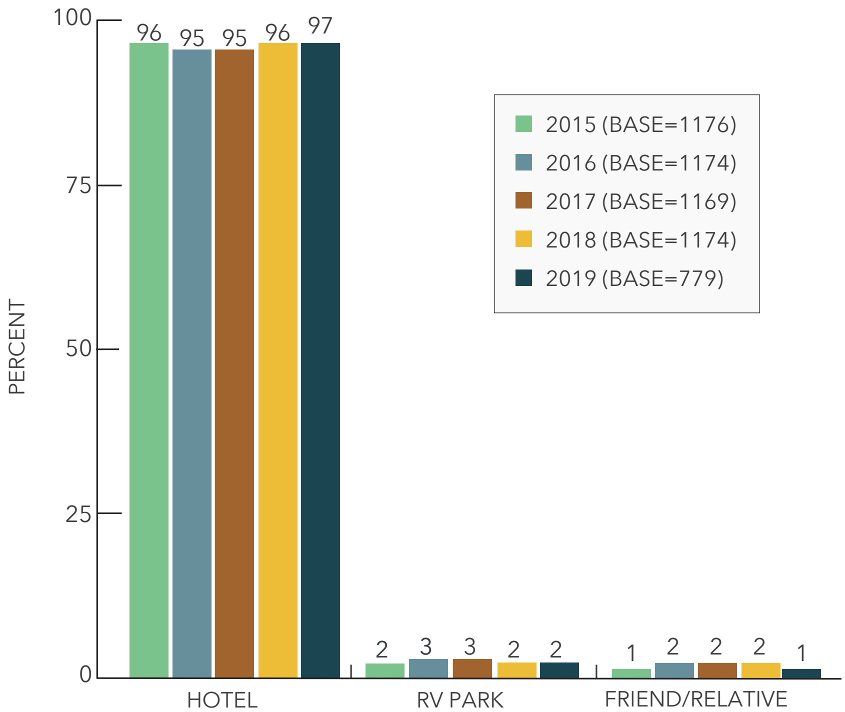


Among Laughlin visitors who stayed overnight in 2019, 97% stayed in a hotel, 2% stayed in an RV Park, and 1% stayed with a friend or relative, almost unchanged over the past five years.

FIGURE 35

Type of Lodging

(Among Those Who Stayed Overnight)



In 2019, 63% of overnight visitors booked their accommodations by calling the property directly, the lowest proportion in the past five years, while 27% booked on a website or app (the highest proportion in the past five years). Another 4% booked in-person and 1% used a travel agent.

FIGURE 36

How Booked Accommodations

(Among Those Who Stayed In Hotel/RV Park)

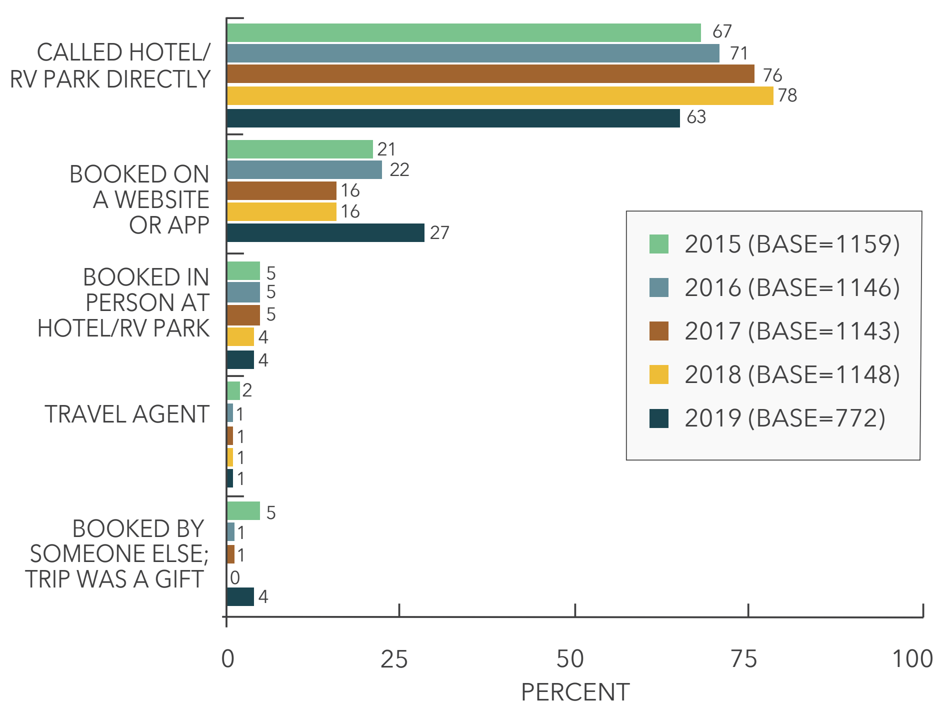
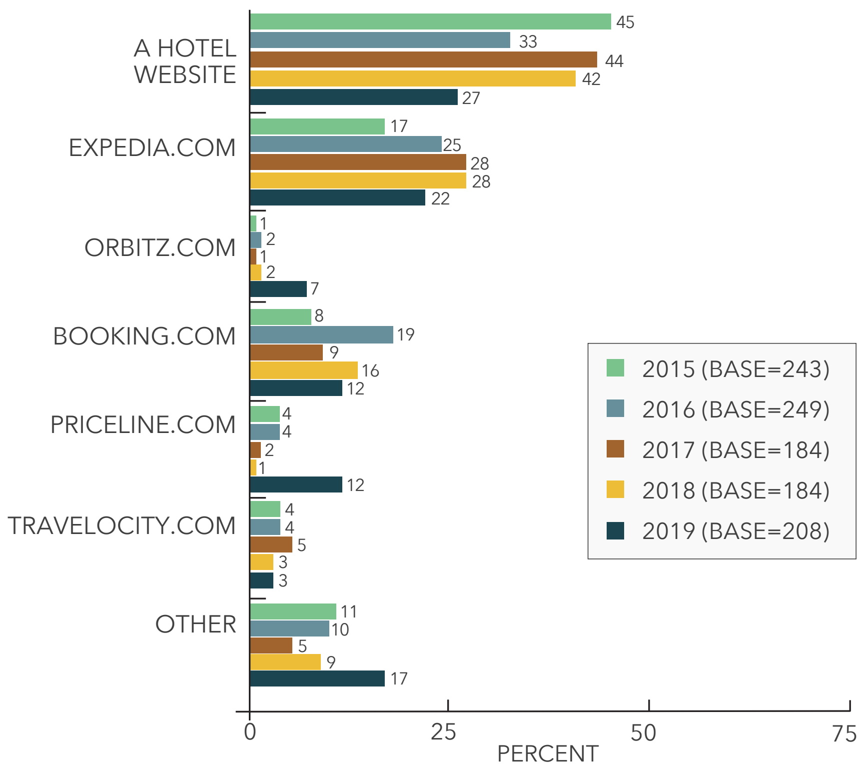


FIGURE 37

Website or App Used To Book Accommodations

(Among Those Who Booked Online)



Laughlin visitors who booked their accommodations on a website or app were asked which one they used. Over one quarter (27%) of them said they used a hotel website, the lowest proportion over the past five years. Twenty-two percent (22%) used Expedia, and 12% each used Booking.com, down from 2018, or Priceline.com, its highest proportion over the past five years. Orbitz.com (7%) also spiked up to its highest level over the past five years.

We asked those visitors staying in a hotel or RV park how far in advance they booked their accommodations. Five percent (5%) of these visitors booked accommodations the same day they arrived in Laughlin, down from a high of 8% in 2017. One in seven (13%) visitors booked one to six days in advance, 51% booked seven to thirty days in advance, similar over the past five years, and 31% booked more than 30 days in advance, the same as last year, but up from 2015 through 2017.

FIGURE 38

How Far In Advance Accommodations Were Booked

(Among Those Staying In A Hotel/RV Park)

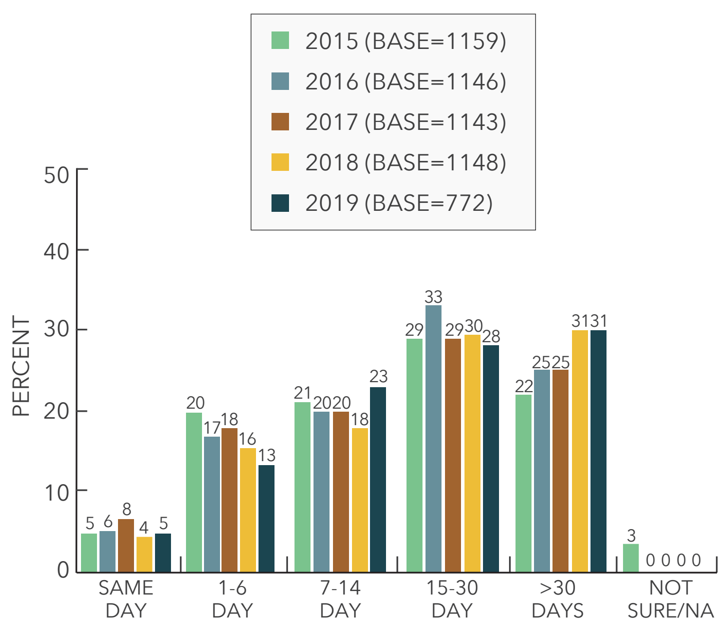
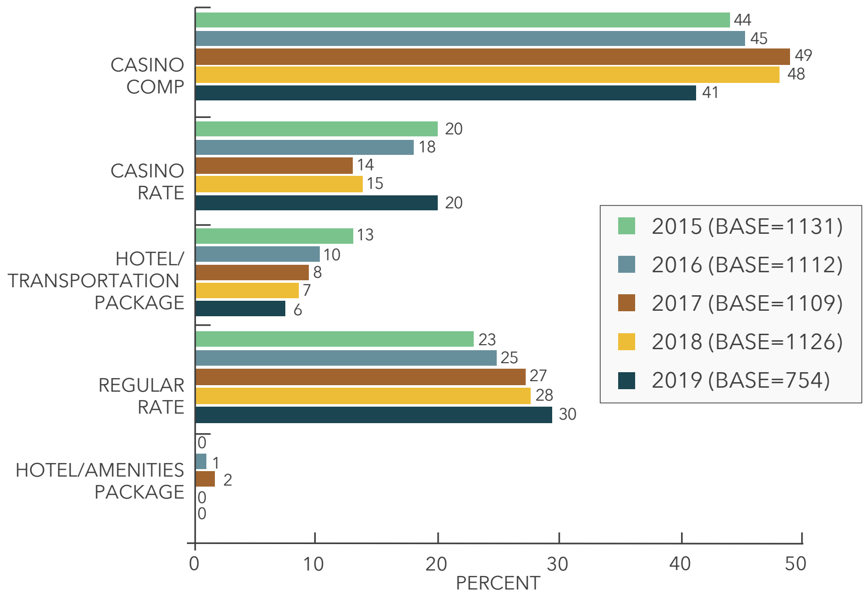


FIGURE 39

Type Of Room Rate (Among Those Staying In A Hotel)



We asked those visitors staying in a hotel what type of room rate they had received for their accommodations. Six in ten (61%) of these visitors said they received some type of casino rate – either a regular casino rate (20%, up from 2017 and 2018) or a casino complimentary rate (41%, down from 2017 and 2018). Six percent (6%) of these visitors received a hotel/ transportation package (down from 2015 and 2016), and 30% received a regular room rate (up from 2015 and 2016).

Figure 40 shows the room rate category by the booking method for 2019. Nearly seven in ten (68%) of those people who called the property directly received a casino or comp rate, another one-fourth (25%) received a regular room rate, and 6% received a package or tour rate. Among those people who used the Internet in 2019, 41% received a regular room rate, 51% received a casino or comp rate, and 2% received a package or tour rate. Four in ten (39%) in-person bookers received a regular room rate and six in ten (61%) received a casino or comp rate.

FIGURE 40

Room Rate By Booking Method (2019)

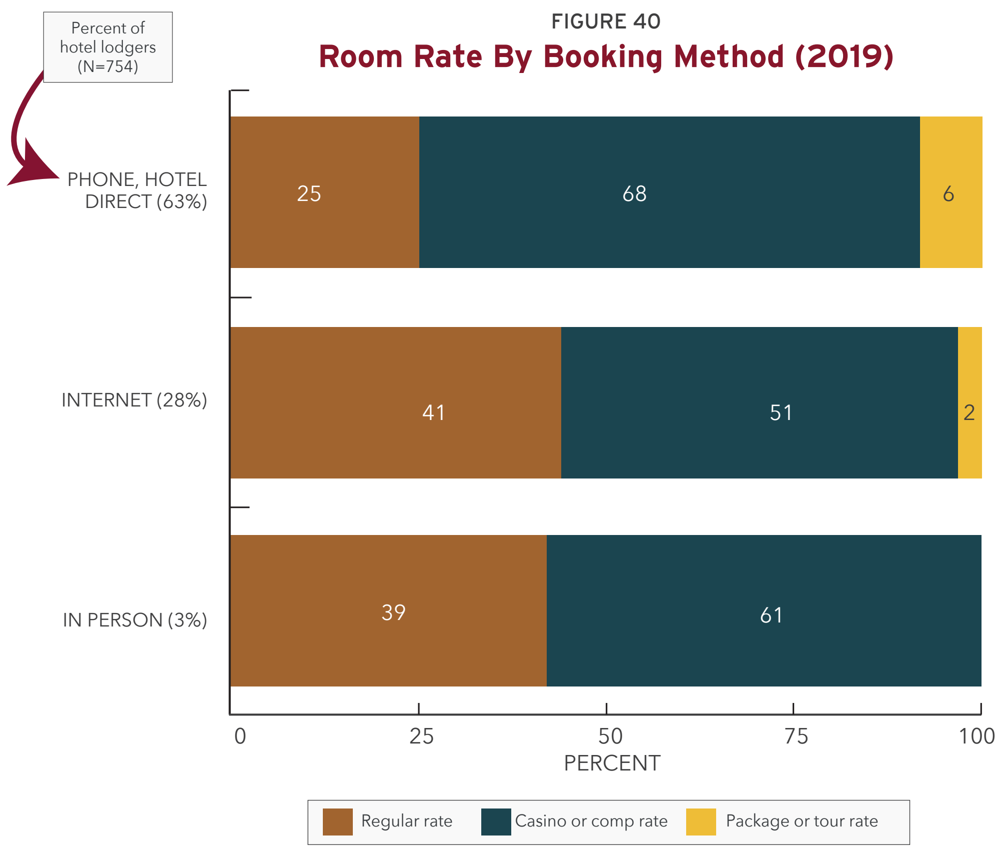
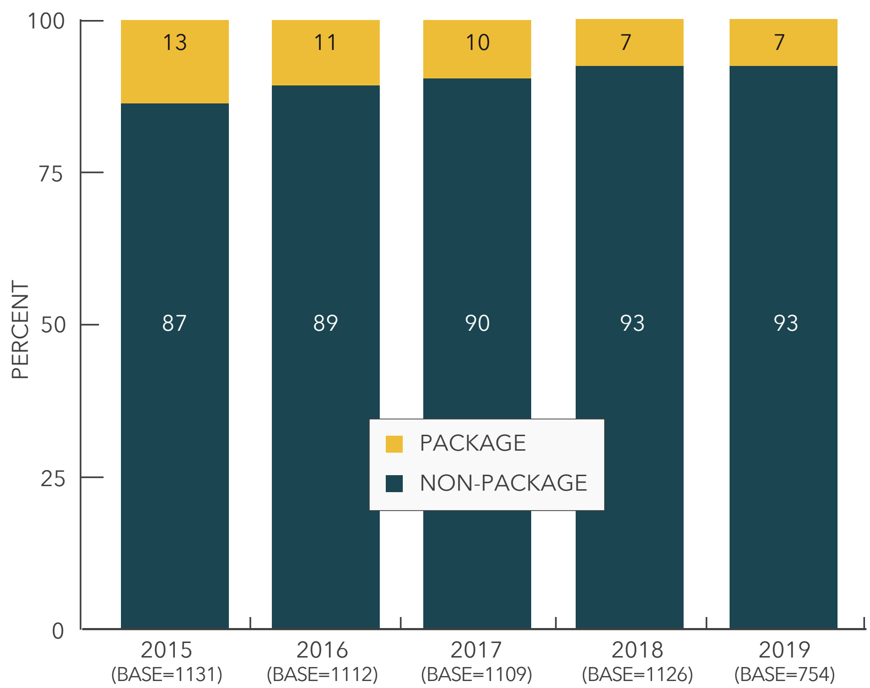


FIGURE 41

Package Vs. Non-Package Rates

(Among Those Staying In A Hotel)



In 2019, 7% of hotel lodgers received their lodging as part of a package deal (most of them received a hotel/ transportation package), the same as last year.

Visitors who purchased a hotel, airline, or travel/tour group package were asked for the cost of their package. About one-sixth (17%) of these visitors said they paid less than $50 for their package, down from 2017 and 2018. Almost four in ten (37%) of these visitors said the package cost was in excess of $150 and the average package cost was $191.26, back up from the five year low observed in 2017.

FIGURE 42

Cost of Package - Per Person

(Among Those Who Bought A Package)

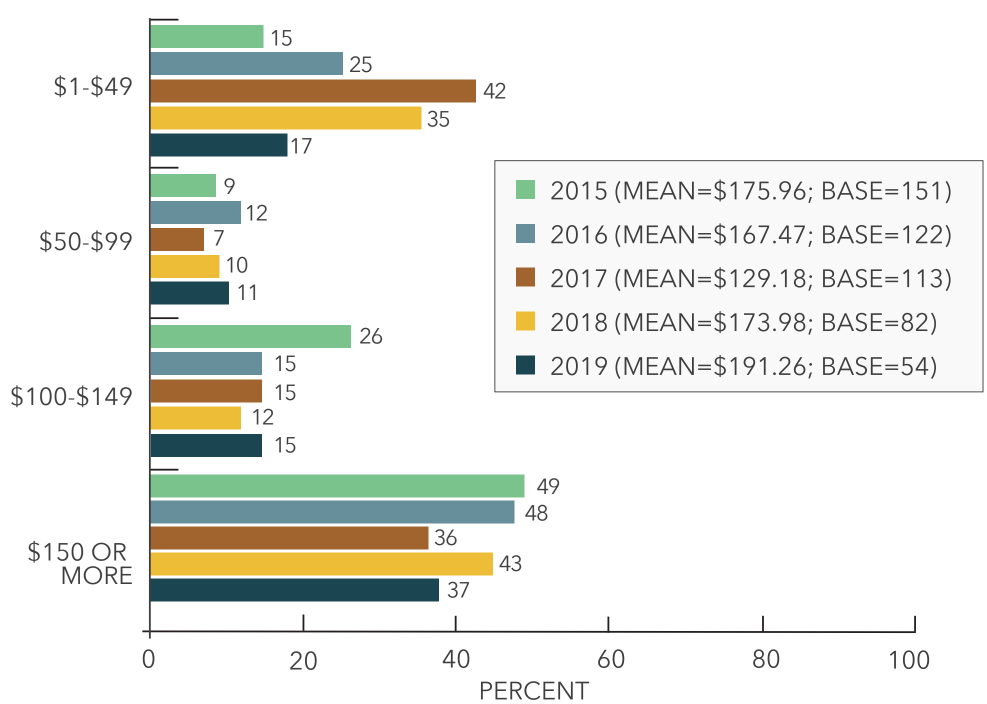
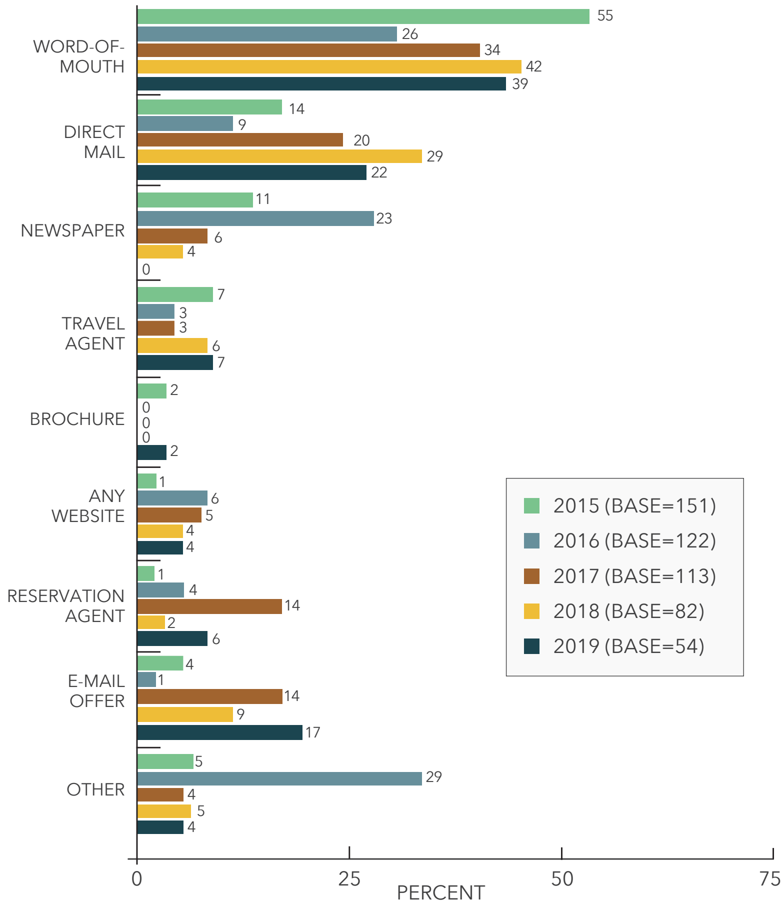


FIGURE 43

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. Four in ten (39%) of them said they first heard about the package through word-of-mouth, down from the high in 2015 (55%), and 22% first heard about the package via an offer received in the mail, up from the 2016. Fewer package purchasers first heard about their package from an email offer (17%, up from 2015 and 2016), a web site (4%), a travel agent (7%), or a reservation agent (6%). No one in 2019 first heard about their package from the newspaper.

The average reported room cost per night among non-package hotel and motel lodgers in 2019 was $56.51, the highest average over the past five years. Fifty-nine percent (59%) of these lodgers reported paying more than $50.00 per night, also the highest proportion over the past five years. Only five percent (5%) of these lodgers said they spent less than $25.00 per night, the lowest proportion over the past five years.

FIGURE 44

Lodging Expenditures – Average Per Night
(Among Those Staying In A Hotel Or Motel/Non-Package and Non-Comp)

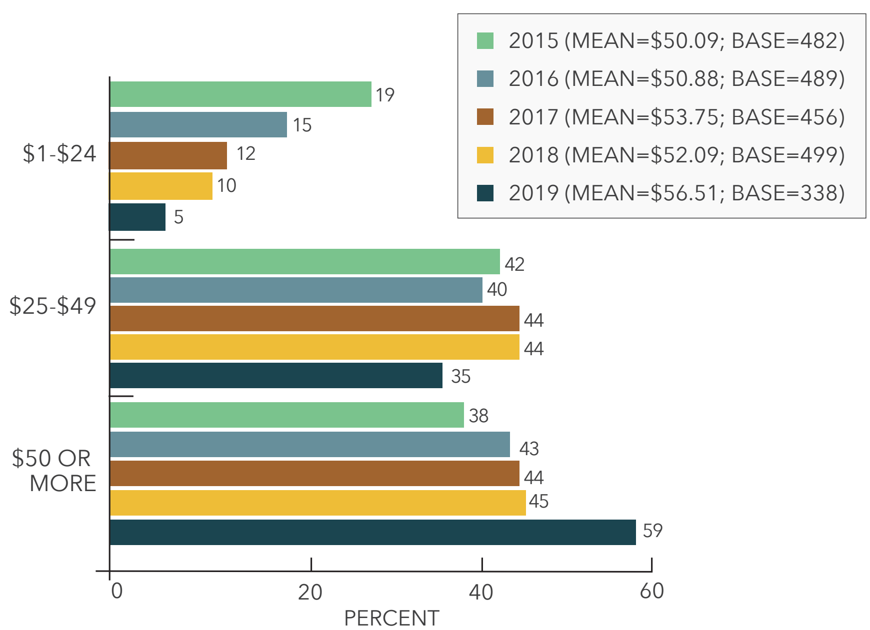
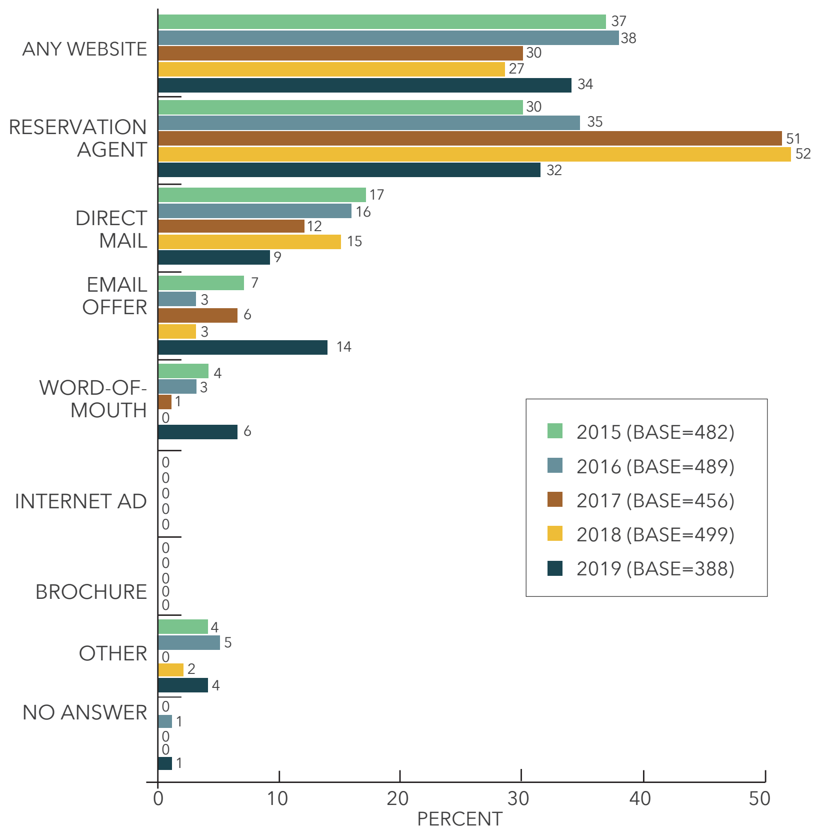


FIGURE 45

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



Non-package hotel lodgers were asked how they first found out about the room rate they paid. One-third (34%) of these visitors said they first heard about their room rate on a website, up from last year. Another one-third (32%) of these lodgers said they first learned about their room rate from a reservation agent, down from the past two years. About one in seven (14%) of these visitors received an email offer, the highest proportion over the past five years, while 9% received an offer in the mail, the lowest proportion in the past five years.

The number of room occupants increased slightly in 2019 with just under three quarters (72%) of Laughlin hotel lodging visitors saying that two people stayed in their room, while 9% of them said three people stayed in their room and 8% said four or more people. The average number of room occupants in 2019 was 2.1, the highest average over the past five years.

FIGURE 46

Number Of Room Occupants
(Among Those Staying In A Hotel)

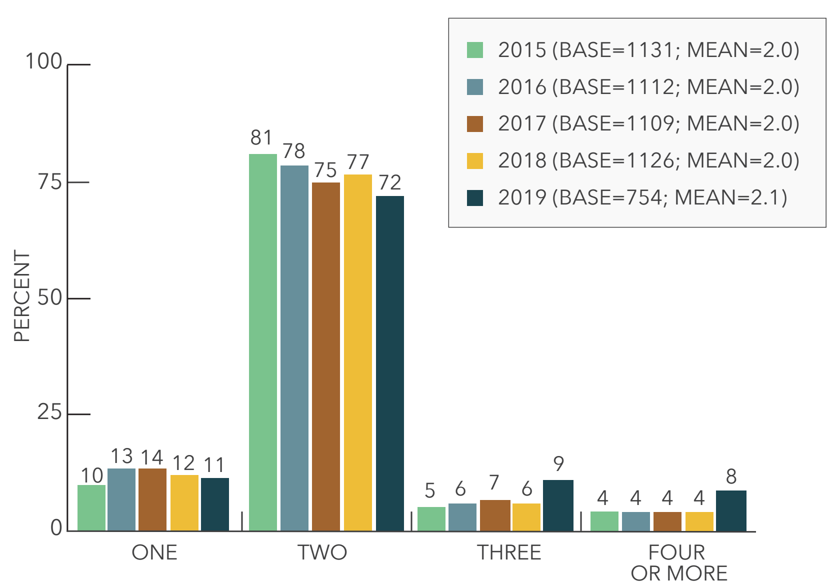
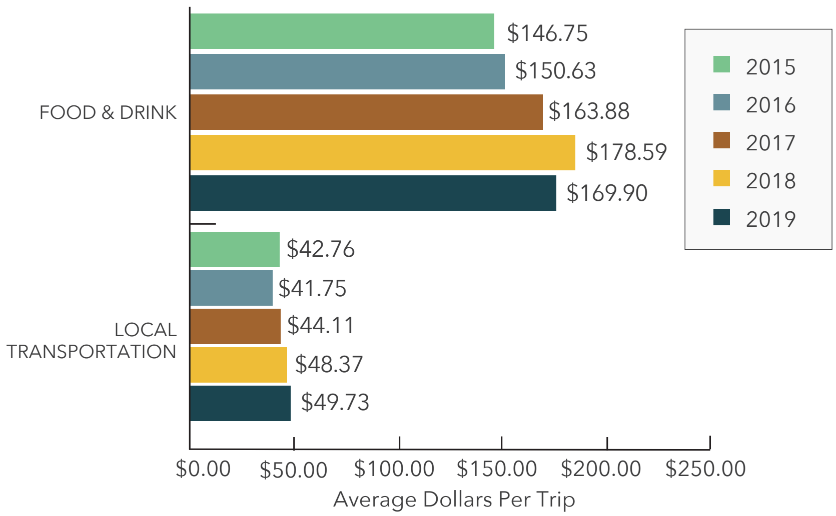


FIGURE 47

Average Trip Expenditures On Food & Drink – And Local Transportation*

(Including Visitors Who Spent Nothing In That Category)



All visitors were asked about their daily expenditures on food and drink and on local transportation.

This chart shows the average trip expenditures including visitors who said they spent nothing in that category. In 2019, the $169.90 average spent on food and drink has been about the same over the past three years, but up from 2015 and 2016, while the $49.73 average spent on local transportation was also up from 2015 and 2016.

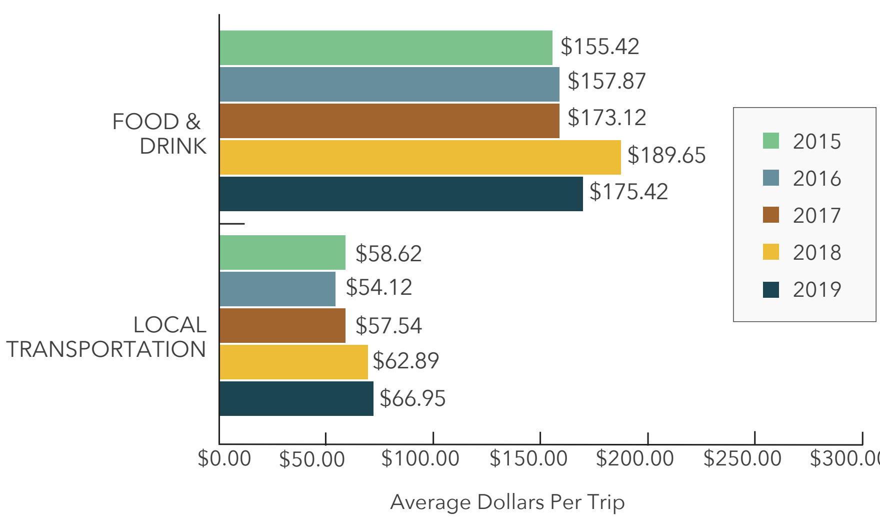
* Trip expenditures are calculated by multiplying visitors' estimated daily expenditures by the number of days they stayed in Laughlin on their most recent trip. Local transportation expenditures include spending in both Laughlin and Bullhead City

Among visitors who indicated they spent money in these categories, average food and drink expenditures in 2019 decreased slightly from 2018 to $175.42, but still higher than 2015 and 2016, while the $66.95 average spent on local transportation remained about the same as last year, but up from 2015 through 2017.

FIGURE 48

Average Trip Expenditures On Food & Drink – And Local Transportation*

(Among Spenders)



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

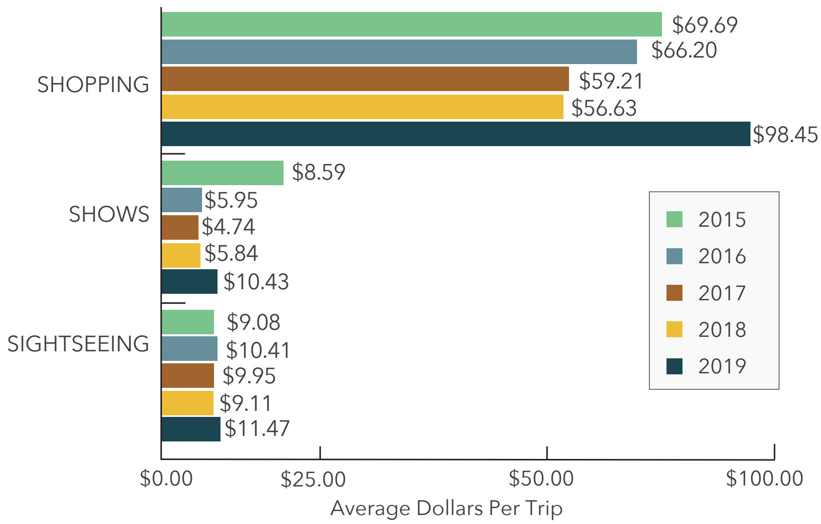
Percentages of respondents who spent money in each category are shown in the following table:

	2015	2016	2017	2018	2019
Food and Drink Base size Proportion of total	(1133) 95%	(1145) 96%	(1136) 95%	(1130) 94%	(775) 97 %
Local Transportation Base size Proportion of total	(876) 74%	(926) 78%	(920) 77%	(925) 77%	(595) 74 %

FIGURE 49

Average Trip Expenditures On Shopping, Shows, And Sightseeing

(Including Visitors Who Spent Nothing In That Category)



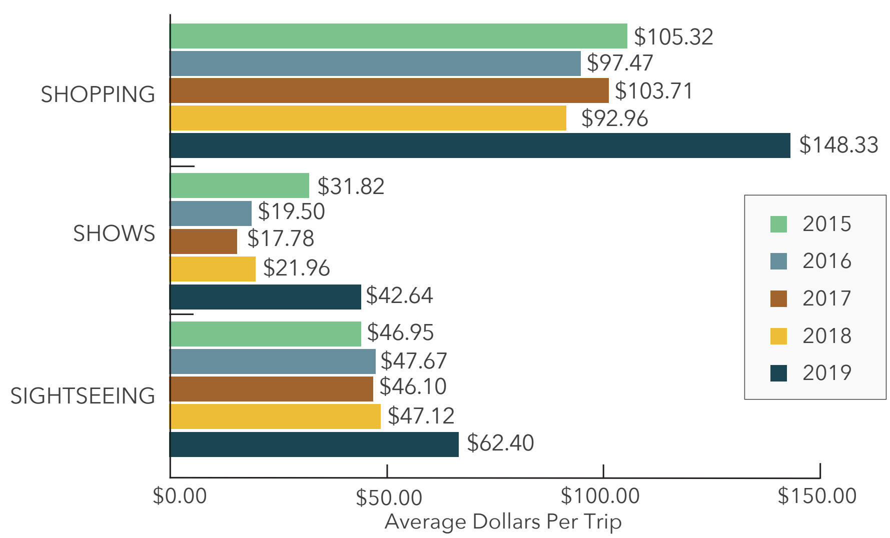
All visitors were also asked about their expenditures on shopping, shows, and sightseeing during their trip to Laughlin. This chart shows average trip expenditures including visitors who said they spent nothing in that category. In 2019, the $11.47 average spent on sightseeing has remained in the same range over the past five years. The average spent on shows in 2019 was $10.43, up from the 2016 to 2018 time period, and the $98.45 average spent on shopping is the highest average amount spent over the past five years.

Among visitors who indicated they spent money in these categories in 2019, average expenditures increased to their highest levels in the past five years for shopping ($148.33), shows ($42.64), and sightseeing ($62.40).

FIGURE 50

Average Trip Expenditures On Shopping, Shows, And Sightseeing

(Among Spenders)



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

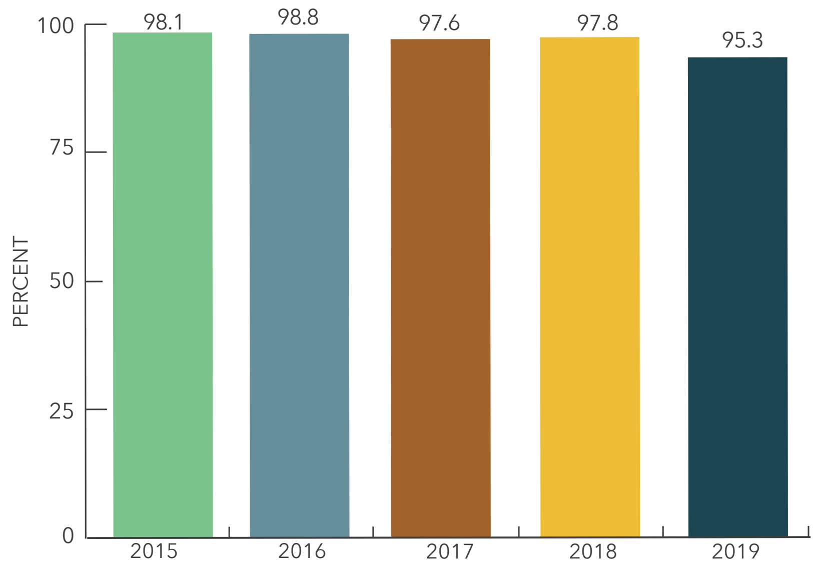
	2015	2016	2017	2018	2019
Shopping Base size Proportion of total	(794) 67%	(815) 68%	(686) 57%	(731) 61%	(532) 67%
Entertainment/Shows Base size Proportion of total	(324) 27%	(366) 31%	(320) 27%	(319) 27%	(198) 25%
Sightseeing Base size Proportion of total	(232) 20%	(262) 22%	(259) 22%	(232) 19%	(152) 19%

GAMING BEHAVIOR AND BUDGETS

Although the lowest proportion over the last five years, nearly all (95.3%) Laughlin visitors in 2019 said they gambled during their visit.

FIGURE 51

Whether Gambled While In Laughlin*

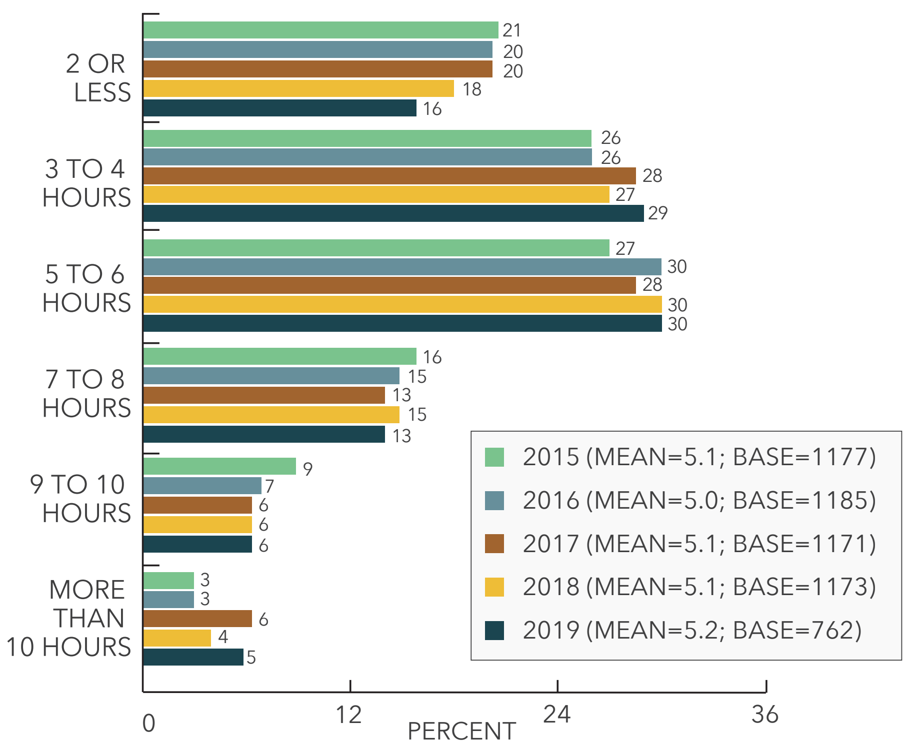


*Only "yes" responses are reported in this chart.

FIGURE 52

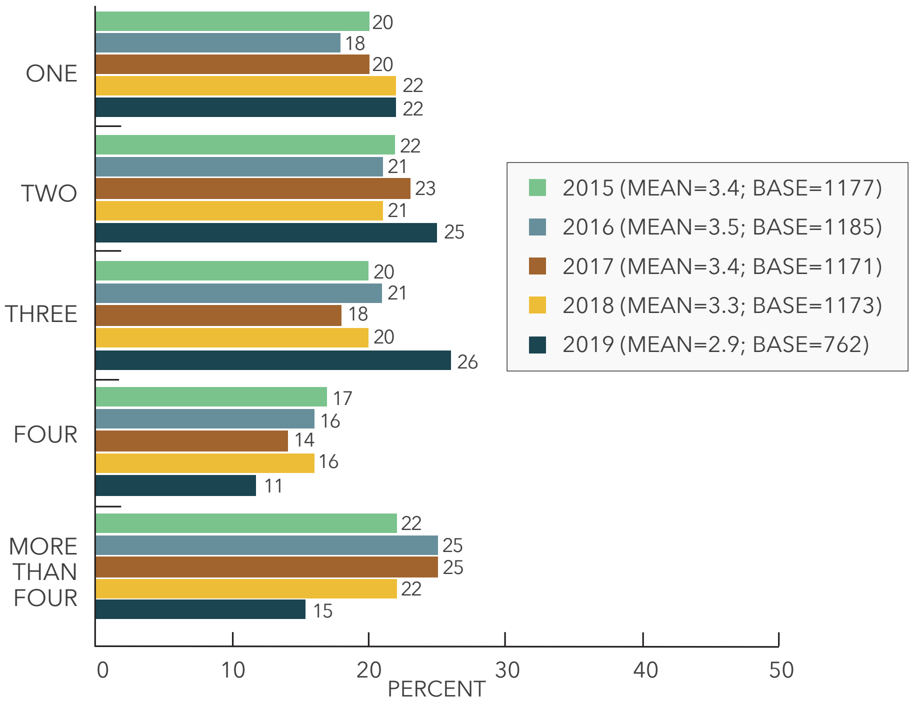
Hours Of Gambling – Average Per Day

(Among Those Who Gambled)



Laughlin visitors who gambled in 2019 said they spent an average of 5.2 hours doing so, about the same over the past five years. In general, the hours spent gambling profile has remained quite similar over the past five years. However, in 2019 the proportion spending two hours or less (16%) is the lowest proportion over the past five years, while the proportion spending more than 10 hours (5%) remains higher than the 2015 and 2016 proportions.

FIGURE 53
Number Of Different Casinos Gambled
(Among Those Who Gambled)



In 2019, gamblers reported gambling at an average of 2.9 casinos during their visit in Laughlin, the lowest proportion in the past five years. The proportion of gamblers gambling at three casinos (26%) was the highest proportion in the past five years, while the proportion of gamblers gambling at more than four casinos (15%) was the smallest proportion in the past five years.

The average trip gambling budget reported by visitors who gambled in Laughlin in 2019 was $659.77, in the same range over the past five years. Six percent (6%) of gamblers budgeted less than $100.00, up slightly over the past four years. Nine percent (9%) of gamblers reported that they budgeted $200.00 to $299.00, the lowest proportion over the past five years.

FIGURE 54
Trip Gambling Budget
(Among Those Who Gambled)

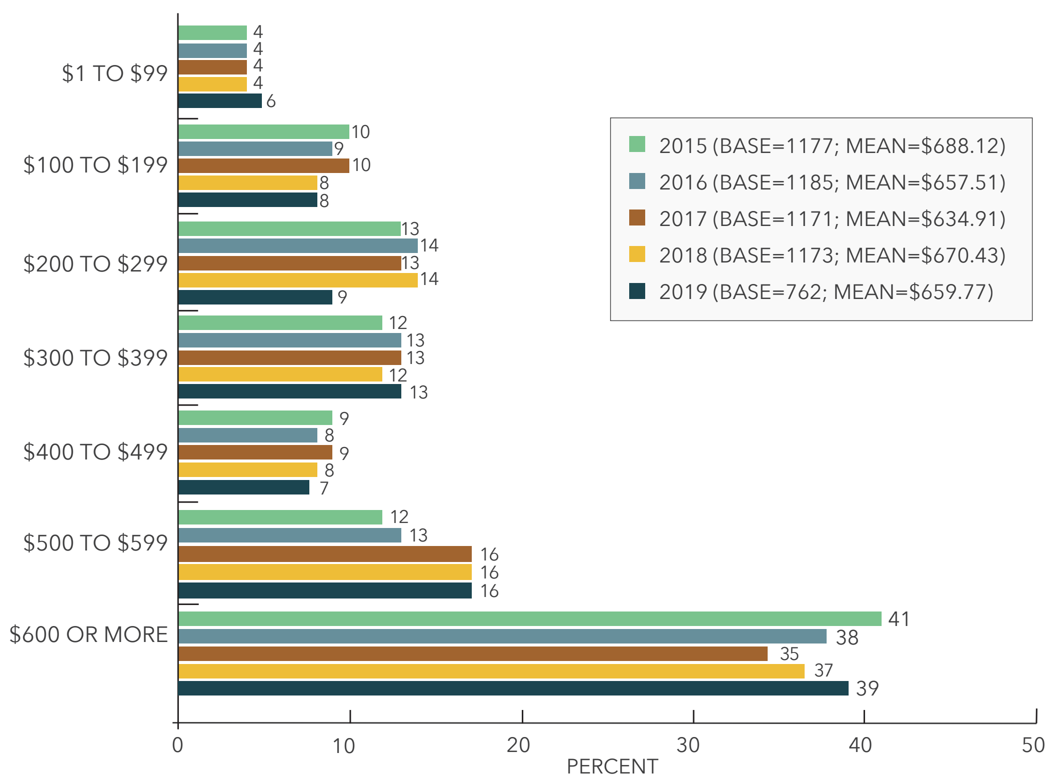
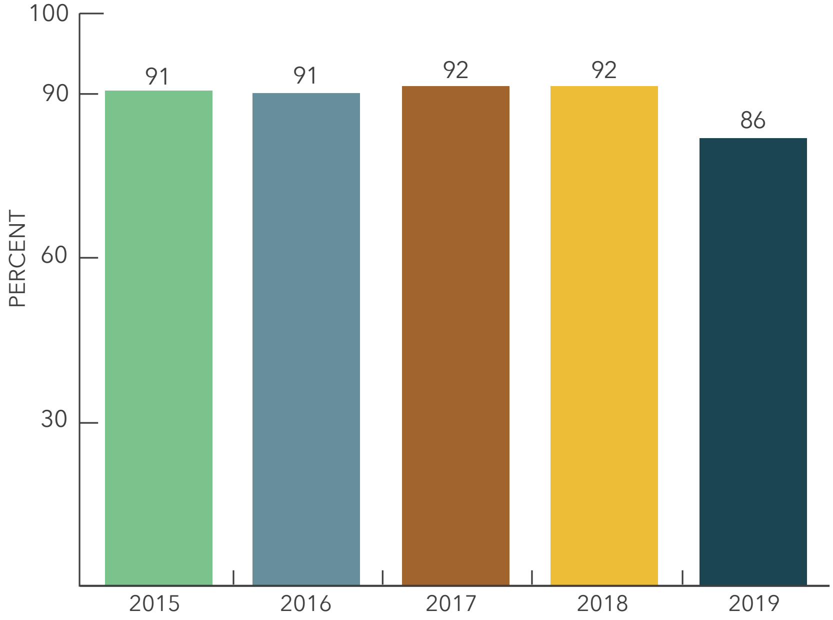


FIGURE 55

Whether Member Of A Slot/Loyalty Club*



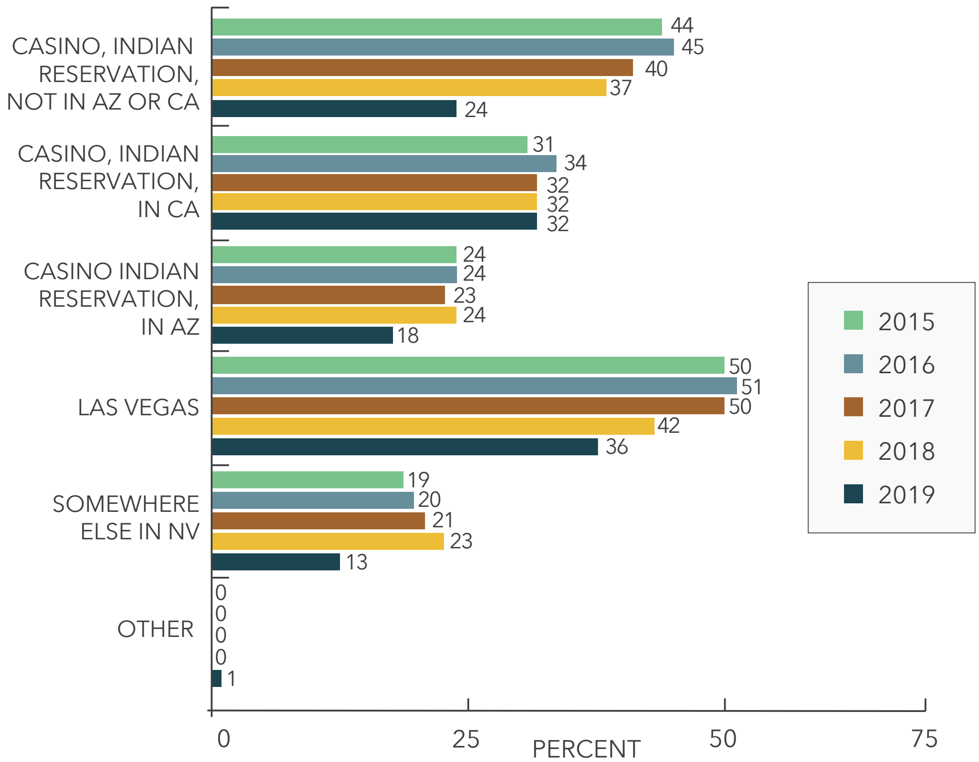
Visitors who said they gambled during their current trip to Laughlin were asked if they were a member of a slot or loyalty club at any of the Laughlin resort properties. In 2019, 86% of these gamblers said they were, the lowest proportion over the past five years.

All visitors were asked about any gambling they had done in specific locations outside of Laughlin within the past 12 months. About one-third (32%) of Laughlin visitors said they gambled at a casino or Indian reservation in California (similar over the past five years) and one-fourth (24%) said they gambled at a casino or Indian reservation not in Arizona or California (the smallest proportion in the past five years). Over one in six (18%) Laughlin visitors said they gambled at a casino or Indian reservation in Arizona, also the lowest proportion in the past five years, and one-third (36%) said they gambled in Las Vegas, again the lowest proportion in the past five years.

FIGURE 56

Where Visitors Gambled Outside Laughlin

(Among All Visitors)



* Multiple responses were permitted to this question.

ATTITUDINAL INFORMATION

In 2019, 85% of Laughlin visitors said they were "very satisfied" with their visit to Laughlin, similar over the past five years. Another 14% of Laughlin visitors said they were "somewhat satisfied" with their Laughlin visit, again similar over the past five years.

FIGURE 57

Satisfaction With Visit

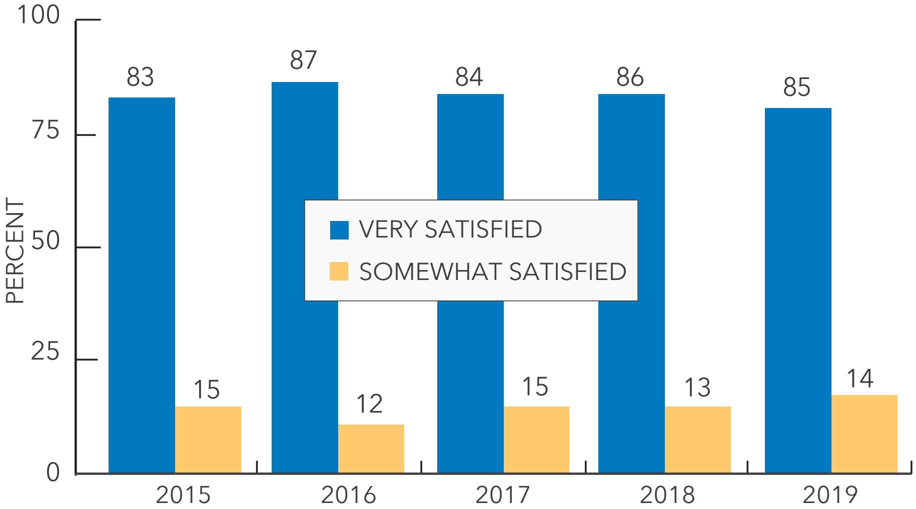
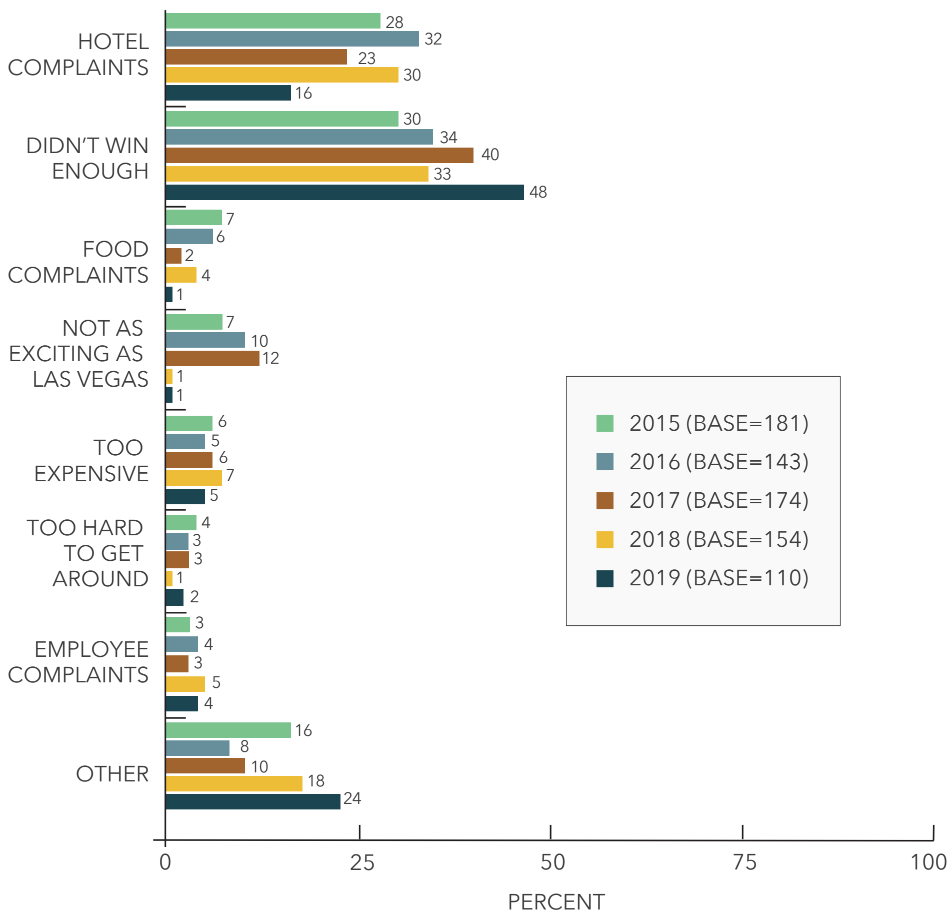


FIGURE 58

Why Not "Very" Satisfied With Visit

(Among Those Who Were "Somewhat" Satisfied)

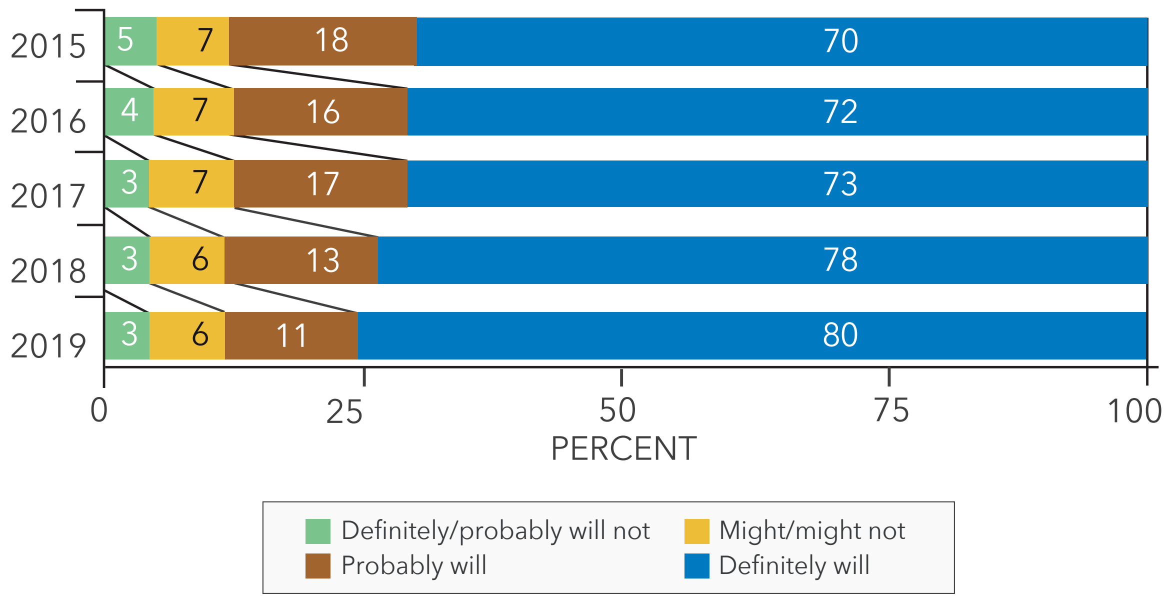


Those visitors who were "somewhat satisfied" with their visit were asked why they were not "very satisfied." In 2019, nearly one-half (48%) of these visitors said they didn't win enough, the highest proportion in the past five years, and another one in six (16%) had hotel-related complaints, the lowest proportion in the past five years.

Visitors were asked how likely they are to return to Laughlin next year. In 2019, 80% said they definitely will return, up from the 2015 to 2017 time period. Eleven percent (11%) said they probably will return, down from the 2015 to 2017 time period.

FIGURE 59

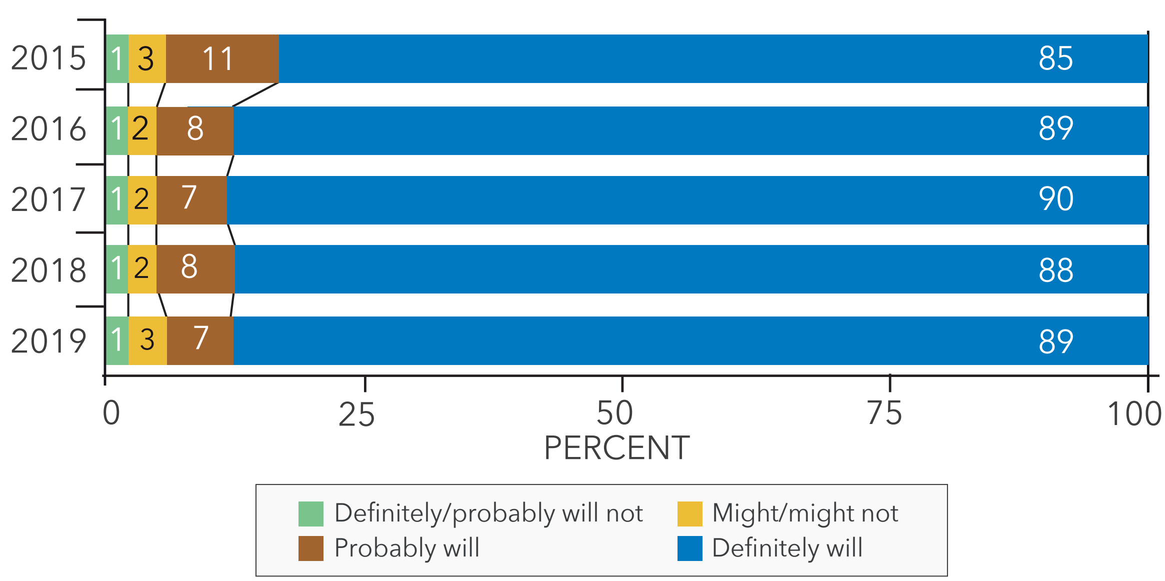
Likelihood of Returning To Laughlin Next Year



Visitors were also asked how likely they are to recommend Laughlin to others. In 2019, 89% said they definitely will recommend Laughlin to others and another 7% said they probably will, quite similar over the past five years.

FIGURE 60

Likelihood of Recommending Laughlin To Others



VISITOR DEMOGRAPHICS

The demographic profile of Laughlin visitors has remained quite similar over the past five years. In 2019 Laughlin visitors were most likely to be married (65%) and from California (38%), although 6% were from the greater Las Vegas area, the highest proportion in the past five years. Less than one-half (43%) of all visitors were 65 years old or older with an average age of 58.0 years old, the lowest average age over the past five years. About three in ten (30%) of Laughlin visitors were high school graduates or less, while 29% were at least college graduates. Over four in ten (44%) visitors were employed, the highest proportion in the past five years and while 71% were White (the lowest proportion in the past five years), 8% were Black/African American, the highest proportion in the past five years. The household income profile is little changed from past years with one-half (51%) having a household income of less than $60,000 and one quarter (26%) having a household income in excess of $80,000.

FIGURE 61

VISITOR DEMOGRAPHICS

	2015	2016	2017	2018	2019
GENDER					
Male	50%	49%	50%	50%	51%
Female	50	51	50	50	49
MARITAL STATUS					
Married	73	67	68	69	65
Single	13	17	16	16	15
Separated/Divorced	7	7	9	6	10
Widowed	7	9	6	9	10
EMPLOYMENT					
Employed	33	37	35	37	44
Unemployed	3	3	4	3	2
Student	1	1	0	1	0
Retired	60	56	58	56	52
Homemaker	4	3	3	3	3
EDUCATION					
High school or less	38	32	33	31	30
Some college	32	33	35	35	36
College graduate	27	31	29	31	29
Trade/vocational school	3	3	3	4	5
AGE					
21 to 29	3	5	4	6	6
30 to 39	7	8	7	8	11
40 to 49	9	11	11	11	14
50 to 59	18	17	20	17	15
60 to 64	15	13	13	13	12
65 or older	49	46	45	46	43
MEAN	61.2	59.4	59.8	59.3	58.0
BASE	**(1200)**	**(1200)**	**(1200)**	**(1200)**	**(800)**

FIGURE 62

VISITOR DEMOGRAPHICS (CONTINUED)

	2015	2016	2017	2018	2019
ETHNICITY					
White	79%	78%	80%	76%	71%
African-American/Black	3	3	3	3	8
Asian/Asian-American	2	2	2	2	2
Hispanic/Latino	16	15	15	17	17
Other	1	2	1	2	2
HOUSEHOLD INCOME					
Less than $20,000	4	4	6	5	5
$20,000 to $39,999	18	18	19	18	18
$40,000 to $59,999	26	28	30	26	28
$60,000 to $79,999	23	21	19	21	22
$80,000 or more	27	27	24	27	26
Not sure/no answer	2	2	3	4	2
VISITOR ORIGIN					
USA	94	95	95	96	97
Eastern states[1]	2	1	1	1	1
Southern states[2]	5	4	4	3	6
Midwestern states[3]	17	17	14	12	12
Western states[4]	*70*	73	75	80	78
California	*35*	37	36	38	38
Southern California	34	35	34	37	36
Northern California	1	2	2	1	2
Arizona	20	20	24	24	23
Greater Las Vegas	4	5	3	4	6
Other West	11	11	13	14	11
Foreign	6	6	5	4	3
BASE	**(1200)**	**(1200)**	**(1200)**	**(1200)**	**(800)**

[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 (excluding Clark County), New Mexico, Oregon, Utah, Washington and Wyoming.

Summary Tables of Visitor Characteristics

APPENDIX

SUMMARY TABLE OF REASONS FOR VISITING AND VISITATION FREQUENCY

	2015	2016	2017	2018	2019
Proportion of visitors who were first-time visitors	10%	9%	10%	8%	14%
Proportion of first-time visitors whose primary purpose for current trip was vacation or pleasure	60%	52%	56%	68%	45%
Proportion of first-time visitors whose primary purpose for current trip was to gamble	16%	9%	17%	12%	15%
Proportion of repeat visitors whose primary purpose for current trip was vacation or pleasure	44%	49%	48%	44%	45%
Proportion of repeat visitors whose primary purpose for current trip was to gamble	32%	27%	27%	27%	26%
Average number of visits in past five years (all visitors)	9.5	9.9	12.0	12.6	11.4
Average number of visits in past five years (repeat visitors)	10.5	10.8	13.2	13.6	13.2
Average number of visits in past year (all visitors)	2.3	2.5	3.3	3.4	3.1
Average number of visits in past year (repeat visitors)	2.5	2.6	3.5	3.6	3.5

SUMMARY TABLE OF TRAVEL PLANNING CHARACTERISTICS

	2015	2016	2017	2018	2019
Proportion of visitors who traveled to Laughlin by ground transportation (automobile/bus/truck/RV)	85%	87%	87%	89%	85%
Proportion of visitors who traveled to Laughlin by air	15%	13%	13%	11%	15%
Proportion of visitors who decided where to stay in Laughlin before arrival	97%	99%	98%	98%	97%
Proportion of visitors who decided where to gamble in Laughlin before arrival	68%	69%	70%	68%	59%
Proportion of visitors who decided which shows to see in Laughlin before arrival	45%	46%	47%	67%	53%
Proportion of visitors who used the assistance of a travel agent in planning their trip to Laughlin	3%	1.5%	0.8%	0.8%	1.6%
Proportion of visitors who used websites, social media, and/or apps in planning their trip to Laughlin	NA	NA	14%	13%	34%
Proportion of visitors who have visited Las Vegas in the past five years	79%	79%	79%	77%	74%
Proportion of visitors who visited Las Vegas on their current trip to Laughlin	14%	14%	17%	13%	17%
Proportion of visitors who toured nearby places	22%	25%	24%	23%	24%

SUMMARY TABLE OF TRIP CHARACTERISTICS AND EXPENDITURES

	2015	2016	2017	2018	2019
Average number of adults in immediate party	2.2	2.1	2.2	2.1	2.0
Proportion of visitors with persons under 21 in their immediate party	5%	6%	6%	5%	10%
Proportion of visitors who stayed overnight	98%	98%	98%	98%	97%
Days stayed (average)	4.4	4.3	4.5	4.4	4.3
Nights stayed (average)	3.4	3.3	3.5	3.4	3.3
Proportion of visitors who stayed in a hotel or motel room (among those who stayed overnight)	96%	95%	95%	96%	97%
Number of room occupants (average)	2.0	2.0	2.0	2.0	2.1
Lodging expenditures (average per night – non-package)	$50.09	$50.88	$53.75	$52.09	$56.51
Proportion of visitors who bought a package or travel group trip	13%	11%	10%	7%	7%
Average cost of package per person (among package/tour group visitors)	$175.96	$167.47	$129.18	$173.98	$191.26
Average trip expenditures for food and drink	$146.75	$150.63	$163.88	$178.59	$169.90
Average trip expenditures for local transport	$42.76	$41.75	$44.11	$48.37	$49.73
Average trip expenditures for shopping	$69.69	$66.20	$59.21	$56.63	$98.45
Average trip expenditures for shows	$8.59	$5.95	$4.74	$5.84	$10.43
Average trip expenditures for sightseeing	$9.08	$10.41	$9.95	$9.11	$11.47

SUMMARY TABLE OF GAMING BEHAVIOR AND BUDGETS

	2015	2016	2017	2018	2019
Proportion who gambled while visiting Laughlin	98.1%	99%	98%	98%	95%
Average trip gambling budget (among those who gambled)	$688.12	$657.51	$634.91	$670.43	$659.77
Average hours per day spent gambling (among those who gambled)	5.1	5.0	5.1	5.1	5.2
Average number of different casinos gambled (among those who gambled)	3.4	3.5	3.4	3.3	2.9
Member of slot/loyalty club	91%	91%	92%	92%	86%

SUMMARY TABLE OF ATTITUDINAL INFORMATION

	2015	2016	2017	2018	2019
Proportion who were "very satisfied" with their current trip to Laughlin	83%	87%	84%	86%	85%
Proportion of visitor who "definitely will" return to Laughlin in the next year	70%	72%	73%	78%	80%
Proportion of visitors who "definitely will" recommend Laughlin to others	85%	89%	90%	88%	89%

SUMMARY TABLE OF NOTABLE VISITOR DEMOGRAPHICS

	2015	2016	2017	2018	2019
Proportion of visitors who were married	73%	67%	68%	69%	65%
Proportion of visitors who were from Southern California	34%	35%	34%	37%	36%
Proportion of visitors who were foreign	6%	6%	5%	4%	3%
Proportion of visitors who were 50 years old or older	82%	76%	78%	76%	70%
Proportion of visitors 65 years old or older	49%	46%	45%	46%	43%
Average age	61.2	59.4	59.8	59.3	58.0
Proportion of visitors who were retired	60%	56%	58%	56%	52%
Proportion of visitors who were employed	33%	37%	35%	37%	44%
Proportion of visitors with a high school diploma or less	38%	32%	33%	31%	30%
Proportion of visitors with a household income less than $60,000	48%	50%	55%	49%	51%

Aggregate Results for Calendar Year 2019

APPENDIX

GLS RESEARCH AGGREGATE RESULTS	LAUGHLIN VISITOR PROFILE STUDY	PROJECT #219302 CALENDAR YEAR 2019

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 Q4**
NO .... NOT SURE/DK .... REFUSED/NA..........	**TERMINATE**

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

FIRST VISIT 14%	**SKIP TO Q9 ON PAGE 3**
VISITED BEFORE.86 NOT SURE/DK ....0 REFUSED/NA..........0	**ASK Q5**

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 2

5. 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.)**

11.4 MEAN (ALL VISITORS)
13.2 MEAN (REPEAT VISITORS) (N=684)

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

3.1 MEAN (ALL VISITORS)
3.5 MEAN (REPEAT VISITORS) (N=684)

7. 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?

(N=684)

YES	42%
NO	58
NOT SURE/DK	0
REFUSED/NA	0

8. 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=684)

TO ATTEND OR WORK AT A CONVENTION/TRADE SHOW	0%
TO ATTEND A CORPORATE MEETING	0
VACATION/PLEASURE	42
TO GAMBLE	28
VISIT FRIENDS/RELATIVES	13
TO ATTEND A SPECIAL EVENT (E.G., DESERT CHALLENGE, A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)	5
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	0
OTHER BUSINESS PURPOSES	2
WATER-BASED RECREATION	5
JUST PASSING THROUGH	4
OTHER	1
NOT SURE/DK	0
REFUSED/NA	0

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 3

9. **(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	45
TO GAMBLE	24
VISIT FRIENDS/RELATIVES	17
TO ATTEND A SPECIAL EVENT (E.G., A RODEO, A CAR OR MOTORCYCLE RALLY, OR AN OUTDOOR CONCERT)	3
TO ATTEND/PARTICIPATE IN A CASINO TOURNAMENT	1
OTHER BUSINESS PURPOSES	1
WATER-BASED RECREATION	3
JUST PASSING THROUGH	3
SOME OTHER REASON	1
NOT SURE/DK	0
REFUSED/NA	0

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

YES	10%
NO	90
NOT SURE/DK	0
REFUSED/NA	0

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

Air	15%
Bus (IF "YES" ASK, "Do you mean...":)	
Regularly scheduled bus service like Greyhound	1
Or a chartered or escorted bus service or bus tour	4
Truck	13
Automobile	63
Motorcycle	1
Recreational Vehicle (RV)	3
REFUSED/NA	0

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

SAME DAY	2%
1-3 DAYS BEFORE	6
4-6 DAYS BEFORE	5
7-14 DAYS BEFORE	18
15-30 DAYS BEFORE	28
31-60 DAYS BEFORE	22
61-90 DAYS BEFORE	9
91-120 DAYS BEFORE	2
MORE THAN 120 DAYS BEFORE	9
NOT SURE/DK	0
REFUSED/NA	0

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 4

13. Which of the following tools did you use in planning your trip to Laughlin? **(INTERVIEWER: READ LIST; ACCEPT MULTIPLE RESPONSES)**

A.	Travel agent	2%
B.	Websites	32
C.	Social media	4
D.	Apps	11
E.	Word of mouth	10
F.	Magazines or newspapers	2
G.	Printed brochures or travel guides	4
H.	Email offers	19
I.	Other (SPECIFY:)	3

14. **(ASK ONLY OF THOSE WHO SAID "YES" TO TRAVEL AGENT IN Q13.)**
Did the travel agent... (N=13)

Influence your decision to visit Laughlin	31%
Influence your choice of accommodations	69
"Book" your transportation	92

15. **(ASK ONLY OF THOSE WHO SAID "YES" TO SOCIAL MEDIA, WEBSITES OR APPS IN Q13)**
. Which, if any, of the following social media or travel review apps or websites did you use to help in planning your trip to Laughlin? **(INTERVIEWER: READ LIST; ACCEPT MULTIPLE RESPONSES)** (N=272)

A.	Facebook	14%
B.	Foursquare	0
C.	Snapchat	1
D.	OpenTable	0
E.	Pinterest	1
F.	TripAdvisor	10
G.	Twitter	0
H.	Yelp	5
I.	Instagram	0
P	Reddit	5
J.	Google	88
K.	Consulted reviews at Online Travel Agencies such as Expedia, Booking.com, etc.	45
L.	Consulted reviews at hotel or show venue sites	24
M.	Other (SPECIFY:)	2

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 5

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

AMONG ALL RESPONDENTS:	Before Leaving Home	While En Route To Laughlin	After Arrival	DOES NOT APPLY	DON'T KNOW	RE-FUSED
				DO *NOT* READ THESE RESPONSE CODES		
a. Where you would stay?	93%	2%	3%	3%	0%	0%
b. Where you would gamble?	55	2	38	5	0	1
c. Which shows you would see? ..	7	2	8	83	1	0

AMONG THOSE TO WHOM THE QUESTION APPLIES:	Before Leaving Home	While En Route To Laughlin	After Arrival	DK/NA	
a. Where you would stay?	95%	2%	3%	0%	(N=780)
b. Where you would gamble?	57	2	40	1	(N=762)
c. Which shows you would see? ..	41	12	45	3	(N=139)

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

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

PART OF LONGER TRIP 13%	**ASK Q18**
ONLY DESTINATION 87	**SKIP TO Q19**
NOT SURE/DK.........................0 REFUSED/NA 0	**SKIP TO Q19**

18. You just said Laughlin was not your only destination on this trip. When you left your home town or city, what was the PRIMARY destination of your trip? (N=101)

ARIZONA 17%

LAS VEGAS 32

CALIFORNIA.............................. 4

OTHER NEVADA 33

COLORADO 1

OTHER 6

NO ANSWER 8

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

YES..................... 17%	**ASK Q20**
NO .... 83 NOT SURE/DK ...... 0 REFUSED/NA........ 0	**SKIP TO Q22**

20. Did you travel to Las Vegas by... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=134)

Air... 19%

Automobile, truck, RV, bus 81

21. On this trip, will you (or did you) visit... (N=134)

A. Downtown Las Vegas (that is, the area on or near Fremont Street)?......... 69%

B. The Strip in Las Vegas (that is, the area on or near Las Vegas Boulevard)?......................... 79

22. 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).)**

TYPE OF LODGING

HOTEL	94%
MOTEL	0
RV PARK	2
FRIENDS/RELATIVES	1
DAYTRIP/OTHER	3

LOCATION OF LODGING

LAUGHLIN	94%
BULLHEAD CITY	0
LOCATION COULD NOT BE DETERMINED	6
FRIENDS/RELATIVES	1
DAYTRIP	3

TYPE OF LODGING
(AMONG THOSE WHO STAYED OVERNIGHT)
(N=779)

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

IF RESPONSE TO Q22 IS A HOTEL OR MOTEL (CODES 1000-2999), ASK Q23 THROUGH Q31.

IF RESPONSE TO Q22 IS AN RV PARK (CODES 3000-3999), ASK Q23 THROUGH Q25, <u>THEN SKIP TO Q32 ON PAGE 9</u>.

IF RESPONSE TO Q22 IS CODE #4000 <u>OR HIGHER</u>, SKIP TO Q32 ON PAGE 9.

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 7

23. 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=772)

a. Booked by phone, calling the hotel, motel, or RV park directly .. 63%
b. Booked through a travel agent (either in person or by phone) 1
c. Booked by phone but not by calling the hotel directly and not through a travel agent 2
d. Booked through a website or app on the Internet using a desktop or laptop computer 11
e. Booked at a website or app on the Internet using a smartphone 13
f. Booked at a website or app on the Internet using a tablet.....................3
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.......................1
i. Not sure because someone else in your party booked the hotel and you don't know how they did it 3

OTHER 0
REFUSED/NA 0

24. **(IF RESPONSE "d, e, or f" IN Q23 IS CHOSEN, ASK:)** Which Web site did you use to book your accommodations? **(ASK AS AN OPEN END. ACCEPT ONLY ONE RESPONSE).** (N=208)

EXPEDIA 22%
TRAVEL.COM 1
ORBITZ 7
PRICELINE...................................... 12
CHEAPTICKETS 3
TRAVELOCITY 3
YAHOO.. 0
HOTWIRE.. 5
HOTELS.COM................................... 0
BOOKING.COM 12
HOTEL WEB SITE (ANY)... 27
OTHER 7
NOT SURE/DK.................................. 1
REFUSED/NA 0

25. 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=772)

SAME DAY 5%
1-3 DAYS BEFORE 7
4-6 DAYS BEFORE 7
7-14 DAYS BEFORE 23
15-30 DAYS BEFORE 28
31-60 DAYS BEFORE 19
61-90 DAYS BEFORE 7
91-120 DAYS BEFORE 1
MORE THAN 120 DAYS BEFORE 3
NOT SURE/DK 0
REFUSED/NA..................... 0

PEOPLE STAYING IN AN RV PARK (CODE 3000-3999 IN Q22) SHOULD SKIP TO Q32 ON PAGE 9 *AFTER BEING ASKED Q25.*

26. Including yourself, how many people stayed in your room? (N=754)

ONE 11%
TWO.................................72
THREE...............................9
FOUR OR MORE 8
REFUSED/NA.....................0
2.1 MEAN

27. Which of the following rate categories best describes your room rate? **(SHOW CARD. ACCEPT ONLY ONE RESPONSE.)** (N=754)

HOTEL/TRANSPORTATION PACKAGE DEAL............6% HOTEL/AMENITIES PACKAGE DEAL............0 TOUR/ TRAVEL GROUP 1	**ASK Q28**
CONVENTION GROUP/ COMPANY MEETING....0 CASINO RATE ....20 REGULAR FULL-PRICE ROOM RATE ...30	**SKIP TO Q30**
CASINO COMPLIMENTARY......41	**SKIP TO Q32**
ANOTHER RATE ....2 NOT SURE/DK...............0 REFUSED/NA 0	**SKIP TO Q30**

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

(N=54)

Less than $50................17%
$50 - $99 11
$100 - $149 15
$150 OR MORE 37
NOT SURE/REFUSED..20
$191.26 MEAN
$135.00 MEDIAN

29. How did you *first* find out about this package? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=54)

OUTDOOR BILLBOARD 0%
BROCHURE 2
E-MAIL OFFER................................ 17
INTERNET AD (POP-UP OR BANNER AD) 2
OFFER RECEIVED IN THE MAIL.... 22
NEWSPAPER.................................... 0
RADIO.. 0
RESERVATION AGENT/ CALL CENTER 6
TELEVISION..................................... 0
TRAVEL AGENT 7
ANY WEB SITE 4
WORD-OF-MOUTH.......................... 39
SOCIAL MEDIA (e.g., Facebook, Twitter, LinkedIn, Google Plus, Instagram,YouTube) 0
OTHER 2
NOT SURE/DK 0
REFUSED/NA.................................... 0

SKIP TO Q32

30. **(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=388)

Less than $25 .... 5%
$25 - $49........................... 35
$50 OR MORE.................. 59
NOT SURE/NO ANSWER... 1
$56.51 MEAN
$50.00 MEDIAN

31. How did you *first* find out about the room rate you paid? **(DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)** (N=388)

OUTDOOR BILLBOARD	0%
BROCHURE	0
E-MAIL OFFER	14
INTERNET AD (POP-UP OR BANNER AD)	0
OFFER RECEIVED IN THE MAIL	9
NEWSPAPER	0
RADIO	0
RESERVATION AGENT/ CALL CENTER	32
SOCIAL MEDIA (e.g., Facebook, Twitter, LinkedIn, Google Plus, Instagram,YouTube)	0
TRAVEL AGENT	1
ANY WEB SITE	34
WORD-OF-MOUTH	6
OTHER	4
NOT SURE/DK	1
REFUSED/NA	0

32. **(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	12%
2	78
3	6
4 OR MORE	4
2.0	MEAN
2.0	MEDIAN

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

YES	10%
NO	90
NOT SURE/DK	0
REFUSED/NA	0

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

DAYTRIP	3%
1	4
2	26
3	41
4	16
5 OR MORE	10
3.3	MEAN
3.0	MEDIAN

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

1	3%
2	4
3	26
4	41
5	16
6 OR MORE	10
4.3	MEAN
4.0	MEDIAN

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

SUNDAY	17%
MONDAY	11
TUESDAY	11
WEDNESDAY	18
THURSDAY	18
FRIDAY	18
SATURDAY	8
REFUSED/NA	0

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 10

37. Have you gambled during this visit to Laughlin?

YES 95%	**ASK Q38**
NO .... 5 NOT SURE/DK........ 0 REFUSED/NA 0	**SKIP TO Q42**

38. 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=762)

1 TO 2 HOURS 16%
3 TO 4 HOURS 29
5 TO 6 HOURS 30
7 TO 8 HOURS 13
9 TO 10 HOURS 6
MORE THAN 10 HOURS........... 5
5.2 MEAN
5.0 MEDIAN

39. How many different casinos have you gambled at during your stay in Laughlin? **(WRITE TWO-DIGIT NUMBER IN BLANKS BELOW.)** (N=762)

1.. 22%
2.. 25
3.. 26
4.. 11
MORE THAN 4......................... 15
2.9 MEAN
3.0 MEDIAN

40. 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=762)

$1 - $99................................... 6%
$100 - $199............................. 8
$200 - $299............................. 9
$300 - $399........................... 13
$400 - $499............................. 7
$500 - $599........................... 16
$600 OR MORE..................... 39
NOT SURE/NO ANSWER....... 2
$659.77 MEAN
$500.00 MEDIAN

41. Are you a member of a slot or loyalty club at any of the Laughlin resorts? (N=762)

YES...................................... 86%
NO.. 14
NOT SURE/DK 0
REFUSED/NA.......................... 0

42. **(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 32%
B. At a casino on an Indian reservation in Arizona 18
C. At a casino on an Indian reservation outside Arizona or California.............. 24
I. In Las Vegas, Nevada........... 36
J. Somewhere else in Nevada (outside the Laughlin area) 13
X. OTHER 1

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

YES 74%
NO 26
NOT SURE/DK 0
REFUSED/NA 0

44. 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 24%	**ASK Q45**
NO .... 76 NOT SURE/DK....... 0 REFUSED/NA 0	**SKIP TO Q46**

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

(N=189)

Hoover Dam.............................. 37%
Lake Mead 19
Lake Havasu/ Colorado River.. 37
Lake Mojave/ Davis Dam 34
Grand Canyon 20
Bryce Canyon 3
Zion National Park 4
Oatman, Arizona 44
Other 7

46. 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.)**

$169.90 MEAN (INCLUDING $0)
$175.42 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.)**

$49.73 MEAN (INCLUDING $0)
$66.95 MEAN (EXCLUDING $0)

47. 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)...........	$98.45 MEAN (INCLUDING $0) $148.33 MEAN (EXCLUDING $0)
B. Shows/entertainment (not including gambling)...	$10.43 MEAN (INCLUDING $0) $42.64 MEAN (EXCLUDING $0)
C. Sightseeing	$11.47 MEAN (INCLUDING $0) $62.40 MEAN (EXCLUDING $0)
D. Other	$9.50 MEAN (INCLUDING $0) $133.16 MEAN (EXCLUDING $0)

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

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

Very satisfied.................... 85%	**SKIP TO Q51**
Somewhat satisfied 14	**ASK Q49**
Somewhat dissatisfied .... 1 Very dissatisfied 0	**SKIP TO Q50**
DO NOT READ NOT SURE/DK................... 0 REFUSED/NA 0	**SKIP TO Q51**

49. 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=110)

DIDN'T WIN ENOUGH GAMBLING...... 48%
HOTEL COMPLAINTS 16
OLD & RUNDOWN/NEEDS UPDATE 7
TOO EXPENSIVE 5
NOTHING TO DO/IT'S BORING............. 5
EMPLOYEE COMPLAINTS 4
ENTERTAINMENT COMPLAINTS 3
FOOD COMPLAINTS.............................. 1
OTHER 12
NO ANSWER 0

50. 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=10)

HOTEL COMPLAINTS 30%
EMPLOYEE COMPLAINTS 20
NOTHING TO DO/IT'S BORING........... 20
DIDN'T WIN ENOUGH GAMBLING...... 10
OTHER 20

51. **(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 11
Might/might not..............................6
Probably will not 1
Definitely will not............................1
NOT SURE/NO ANSWER.............1

52. 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............89%
Probably will recommend 7
Might/might not recommend..........3
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.

53. Are you currently... **(READ LIST. ACCEPT ONLY ONE RESPONSE.)**

Employed 44%	**ASK Q54**
Unemployed ....2 Student ....0 Retired ....52 Homemaker.....................3	**SKIP TO Q55**
DO NOT READ REFUSED/NA 0	**SKIP TO Q55**

54. 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=348)

SERVICE WORKERS 25%

MANAGERS/OFFICIALS/ PROPRIETORS 24

SALES/CLERICAL WORKERS .. 22

PROFESSIONAL/TECHNICAL ... 14

CRAFT WORKERS/FOREMEN .. 12

OTHER 2

REFUSED/NO ANSWER 1

55. 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) 27

SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE — NO BACHELOR'S DEGREE) 36

GRADUATED COLLEGE 25

GRADUATE SCHOOL (MASTER'S OR PH.D.) 4

TECHNICAL, VOCATIONAL, OR TRADE SCHOOL.....................5

REFUSED/NA 0

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

Married......................................65%

Single 15

Separated or divorced 10

Widowed 10

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

57. What country do you live in?

USA 97%	**ASK Q58**
FOREIGN 3	**SKIP TO Q59**
REFUSED/NA................... 0	**SKIP TO Q59**

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

EAST 1%

SOUTH..6

MIDWEST 12

WEST 78

CALIFORNIA 38

ARIZONA 23

GREATER LAS VEGAS 6

OTHER WEST.........................11

FOREIGN VISITORS 3

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

GLS RESEARCH	2019 LAUGHLIN VISITOR PROFILE STUDY (#219302) AGGREGATE RESULTS	PAGE 14

59. **(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 71%
BLACK OR AFRICAN AMERICAN 8
ASIAN OR ASIAN AMERICAN 2
HISPANIC/LATINO 17
NATIVE AMERICAN 1
MIXED RACE 1
OTHER 0
NOT SURE/DON'T KNOW................. 0
REFUSED/NO ANSWER................... 0

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

58.0 MEAN
61.0 MEDIAN

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

21 to 29... 6%
30 to 39... 11
40 to 49... 14
50 to 59... 15
60 to 64... 12
65 and older.................................. 43
REFUSED/NA 0

61. 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..................... 5%
B. $20,000 to $29,999 7
C. $30,000 to $39,999 11
D. $40,000 to $49,999 13
E. $50,000 to $59,999 15
F. $60,000 to $69,999 10
G. $70,000 to $79,999 12
H. $80,000 to $89,999 8
I. $90,000 to $99,999 4
J. $100,000 to $149,999 12
K. $150,000 or more...................... 3
NOT SURE/DK 0
REFUSED/NA................................. 2

HOTEL RATES

1. **HOTEL/TRANSPORTATION PACKAGE DEAL**
   One price that includes your hotel room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

2. **HOTEL/AMENITIES PACKAGE DEAL (NO TRANSPORTATION INCLUDED)**
   One price that includes your hotel room ***and*** other items such as shows, meals, or other amenities, but ***does not*** include airfare or bus transportation to Las Vegas.

3. **TOUR/TRAVEL GROUP**
   You are traveling as part of a tour or travel group. The tour/travel group package price includes room ***and*** airfare or bus transportation to Las Vegas. The package may or may not also include other items such as shows or meals.

4. **CONVENTION GROUP/COMPANY MEETING**
   Arranged through an employer or convention.

5. **CASINO RATE**
   Special reduced rate arranged through a casino host or casino employee.

6. **REGULAR FULL-PRICE ROOM RATE**
   Full price, no discounts.

7. **CASINO COMPLIMENTARY**
   Room is free of charge.

8. **ANOTHER RATE**
   Any other special room rate not shown above.

HOW ACCOMMODATIONS WERE BOOKED

A. **PHONED DIRECTLY**
Booked by phone, calling the hotel, motel, or RV park directly

B. **TRAVEL AGENT**
Booked through a travel agent (either in person or by phone)

C. **PHONED, BUT NOT DIRECTLY, NOT THROUGH AGENT**
Booked by phone but not by calling the hotel directly and not through a travel agent

D1. **INTERNET – DESKTOP/LAPTOP**
Booked through a website or app using a desktop or laptop computer

D2. **INTERNET – SMARTPHONE**
Booked through a website or app using a smartphone

D3. **INTERNET – TABLET**
Booked through a website or app using a tablet

E. **IN PERSON**
Booked in person at the hotel, motel, or RV park

F. **GIFT, PRIZE, OR INCENTIVE**
The trip was a gift, prize, or incentive, so the accommodations were booked for you

G. **DON'T KNOW BECAUSE SOMEONE ELSE BOOKED**
Not sure because someone else in your party booked the hotel and you don't know how they did it

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

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

For further information please contact the LVCVA Research Center at 702-892-2805, or at research@lvcva.com.