Trip Characteristics of Casino and Racino Visitors In A Midwestern State

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Abstract

Gaming is a revenue driver for many areas and can be an economic boost for businesses and tourism entities around gaming venues. This study seeks to provide a comprehensive overview of the characteristics profile and expenditures of casino and racino visitors in a Midwestern state as a valuable resource that could be used by those in tourism planning to better determine who is coming into their state for gaming purposes and how they might better attract and accommodate them. Suggestions will be made based on the findings to aid in determining effective marketing methods to attract visitors, as well as facility or program enhancements to increase visitor expenditures.

Keywords: Gaming, tourism, casino, racino

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Introduction

Gaming destinations not only draw tourists to their facilities but can also be a boon for the economy of the communities where they are located (Long, 1995). Gaming operations are often a fix to economic woes in areas with a slow economy (Raento, 2000) and have transformed many areas that were not previous tourist attractions into destination locations (Eadington, 1999). Casino gaming can now be found in destination resorts, in former mining towns, on riverboats, in urban or suburban settings, and on Indian reservations. Although there was well documented declines in the economy for many sectors of tourism, Fahrenkopf (2008) found that modest but steady growth occurred in gross gaming revenue despite a slowing national economy in late 2007. This growth was a direct result of the expansion of commercial casinos into new jurisdictions, the opening of new properties in existing jurisdictions, the continued revitalization of individual properties across the country and the redevelopment of the gaming industry that was damaged by Hurricane Katrina.

According to the American Gaming Association (AGA), gross gaming revenues totaled $34.13 billion in 2007 and the 467 U.S. commercial casinos employed over 360, 000 people, paid wages of $13.8 billion. From 2006 to 2007 the largest growth of jobs in commercial casinos was in Missouri (11.6%) and Michigan (9.9%). (American Gaming Association, 2008a) Additionally, tax revenues more than doubled from $2.5 billion in 1998 to $5.79 billion in 2007 and gaming employment grew 10% from 1998 to 2007(American Gaming Association, 2008b). During 2007, 54.5 million U.S. adults visited casinos, making a total of 376 million casino trips (American Gaming Association, 2008a). The annual revenue of the top 10 casino markets is shown in Table 1.

Table 1
Top 10 U.S. Casino Markets by Annual Revenue

Casino Location	2007 Annual Revenues
Las Vegas Strip, NV	$6.750 billion
Atlantic City, NJ	$4.921 billion
Chicagoland, IL/IN	$2.602 billion
Connecticut, CT	$1.685 billion
Detroit, MI	$1.335 billion
Tunica/Lula, MS	$1.243 billion
Biloxi, MS	$1.207 billion
St. Louis, MO/IL	$999.37 million
Boulder Strip, NV	$927.70 million
Reno/Sparks, NV	$927.60 million

Source: American Gaming Association (2008c)

Although there has been a substantial spread of casinos across the country, Nevada and New Jersey are still the destination of almost one half of all gambling tourism trips in the United States (Raento, 2000). Nevada should be no surprise since the AGA (2008a) reported that in 2007 they had 270 commercial casinos, but New Jersey only boasted 11. The AGA (2008a) reported that in 2007, there were casinos or gaming locations in 37 states with 29 of those states having a total of 424 tribal casinos. In terms of tribal casinos, Oklahoma leads the pack. Oklahoma ranks first in the nation in the number of tribal casinos (100), second in gaming machines (41,771), and fourth in revenue ($1.97 billion). Additionally, Oklahoma has the highest market penetration rate of any of the leading tribal gaming states with one slot machine for every 65 adults in the state (Grogan, 2008) This is up from the 55 tribal gaming facilities that were in existence in Oklahoma in 2001 (Grant, Spilde & Taylor, 2004).

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Characteristics of Casino Tourists

Rosecrance (1986) stated that gambling, as a leisure activity, serves different purposes for individuals including recreation, socialization, exercise of intellectual prowess, or escapism. Those who use gambling as mere entertainment tend to enjoy games of chance where no skill is required (e.g., lottery, tickets, bingo, slot machines). In contrast, gamblers who prefer to be involved in their gambling are more attracted to horse racing, blackjack, poker and bridge where both chance and skill are involved (Walker, 1992). In a study of vacationer profiles, Morrison, Braunlich, Cai, and O'Leary (1996) found that casino vacationers were considerably older and had lower incomes than the other three groups. Also, in term of travel planning, casino visitors planned their trips an average of two months in advance, which was the shortest timeframe of all of the groups.

Trip Expenditures of Casino Visitors

Braunlich (1996) studied casino visitation in Atlantic City, New Jersey, in terms of visitor spending and visitation patterns. The findings revealed several reasons that visitors choose Atlantic City including: popularity, casino and night life, affordability, accessibility, first-class hotels and dining, the beach, and the boardwalk. The majority of the visitors to Atlantic City were from New Jersey and neighboring states such as New York, Pennsylvania, and Maryland and the majority of visitors stayed one day or less. The study found that visitors spent 53% of their time gambling and 36% of their time eating, shopping, or walking on the boardwalk (Atlantic City Convention and Visitor Bureau, 1993 cited in Braunlich, 1996).

A study by Spotts and Mahoney (1991) focused on travel expenditures by segmenting travel parties to the light, medium, and heavy spenders based on each party's total expenditures in the destination. The results stated that the heavy spenders were more likely to be a part of larger party sizes, with longer length of stays, have greater involvement with recreation, and have a greater propensity to use information provided by the region's travel industry. Later Moufakkir, Singh, Woud and Holecek (2004) furthered Spotts and Mahoney's (1991) study to extend the profiles to the gaming traveler by conducting a study emphasizing non-gaming related spending trends by casino visitors. The expenditures types included in the study were as follows; 1) lodging, 2) food and beverage inside the casino, 3) food and beverage outside the casino, 4) gasoline purchase, 5) local transportation, and 6) other expenses such as gift and souvenirs. The averages of total non-casino expenditures were $380.35, $36.56, and $15.58 for the heavy, medium, and light spenders respectively. The study reported that the typical heavy spenders were first time visitors whose main trip purpose was either to visit the casino destination or visit friends and relatives. They traveled with a larger party size (2.06 persons), stayed longer (3.17 days), and participated in recreational activities on the trip.

Attaway and Morgan (1997) explored prior gambling experiences in terms of trip characteristics of respondents who reside in Illinois, Missouri, Indiana, Iowa, and Wisconsin. The finding showed that the majority of respondents travel to the casino by automobile with the average distance of 121 miles and the average travel time of more than 60 minutes. On average the respondents stayed in the gaming operation host city for 31.84 hours. The average reported winnings were $284 while the average reported losses were $86. The average non-gaming expenditures were $165. In terms of non-gaming recreation, individuals who traveled with family members or traveled 121 miles or more, spent significantly more on other entertainment activities (amusement parks, shopping, museums, sport events) compared to individuals traveling alone or who traveled less than 121 miles.

Gaming in the Midwest

In spite of this enormous growth, there is relatively little documented research conducted to determine the profile of the casino and racino visitors in the Midwest. Since gaming operations in the Midwest, as in many developing gaming areas, are predominately, if not exclusively, Native American Tribal casino operations, they have their own unique issues with which to deal. These issues include: a broad geographic area; and a lack of an organized marketing and promotion organization, as opposed to an area such as Las Vegas, Atlantic City or Tunica, Mississippi, that have CVBs to promote their specific areas. Additionally, although they do contribute to the state's tourism economy by drawing visitors, their specific financial contribution to the state's tourism budget is different from other non-tribal tourism establishments. Tribal gaming impacts are less in terms of gaming taxes and more in terms of wages, unemployment taxes and socially responsible support of city, school and counties (Grant et. al, 2004).

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Therefore, acquiring the gaming visitor's characteristics for use by varying groups should be gathered to be specific enough to be of use to individual gaming facilities but broad enough to provide useful information to facilities of varying sizes and locations within a specific state as well as the state tourism officials who might not have access to the information from tax rolls. That being said, the purpose of this study was to determine the travel behavior including trip characteristics and expenditures of casino visitors in a selected Midwestern state to better determine who is coming into their state for gaming purposes.

Method

To determine the characteristics and spending patterns of the Midwestern state gaming visitors, the approach of this study was to utilize previously published research related to casino visitation, and to supplement the previous information with additional information from experts in the casino, racing, leisure, and recreation fields (Attaway & Morgan, 1997; Park, Yang, Lee, Jang, & Stokowski, 2002; Spotts & Mahoney, 1991). From this information a comprehensive 87-item survey was developed that solicited data in three major areas: respondent demographics, trip characteristics and opinions, as well as trip expenditures. A full service marketing company was then recruited for collection of data using an online panel. A large pre-recruited, managed, online consumer panel with over one million members was utilized to collect the data from visitors who had been to the state for gaming purposes in the past 12 months. A series of screening questions were used to ensure that the potential respondents from the panel were qualified to participate in the survey. Once qualified, the panel members were allowed access to the online, self-administered survey. The following screening questions were asked, in order, to establish qualification:

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1. Are you 21 years of age?
2. Have you gambled in a casino or racino in the past 12 months?
3. Have you gambled in a casino or racino in the specific Midwestern state during the past 12 months?
4. Do you have a positive or neutral attitude towards gambling?
5. Do you live within 300 miles of the capital city (which is centrally located) of the Midwestern state?
6. Are you a resident of the Midwestern state being studied or a surrounding state?

Results

A total of 590 usable responses were returned from the survey. The margin of error for the questions was +/- 2.3% with a 95% confidence interval. Some of the data does not add up to 100% due to rounding or because respondents were allowed more than one choice for the questions. Of those surveyed 52% were females and 48% were males, with a mean age of about 44 years. The majority (89%) of the respondents thought of themselves as being Non-Hispanic Whites and two-thirds of the respondents were married. The median household income was $46,225. Approximately 52% of the respondents reported being residents of the specific Midwestern state, the remaining almost equally from the four neighboring states.

A majority of the visitors (56.6%) were couples with no children, with the majority (72.4%) of the respondents agreeing that they would visit the Midwestern state for tourism purposes even if no gaming facilities were available. However 63.1% of the respondents did not engage in any other activity other than gambling. For those who did participate in non-gaming activities, the three most popular activities engaged in were: shopping (15.2%), visiting relatives and friends (12.2%), and entertainment activities (7.6%). In terms of gaming, slot machines were by far the predominate choice in gaming (91.6%).

Only 32.8% of the respondents agreed that they visited the Midwestern state solely because gaming was not available in their own state. On the other hand, an overwhelming majority (72.4%) of the respondents agreed that they would visit the state for tourism purposes even if no gaming facilities were available.

Visitors made on average 2.67 trips exclusively to casinos and racinos in the Midwestern state with an overwhelming number of visitors (81.6%) making day trips with no overnight stays. Only 8.6% of the respondents stayed one night and another 6.5% of the visitors stayed two nights. Less than 3.2 % of the respondents stayed more than two nights. Almost all (95.9%) of all respondents used their personal car, truck, or van to visit the casinos and racinos. Only about 1.6% of the visitors had used a charter or tour bus. Less than 1% of the respondents arrived by plane.

About 42% of the respondents had traveled less than 25 miles to visit their casino or racino destination. About 61% had traveled less than 50 miles, and about 75% had traveled less than 100 miles to visit their destinations. The weighted average of the miles driven by the respondents was 55.37 miles.

In terms of determining whether to visit a particular casino or racino, word-of-mouth (my friend/family told me; 39.1%), and past experience or visit (28.3%) were the two most popular sources cited by the respondents. The third most popular item cited was, "I live in the neighborhood" with 24.1%. Among the hard information sources, billboard signs (19%) and signage (happen to drive by, 14.1%) were the most popular sources cited.

The majority of the visitors (56.6%) are couples with no children. The next most popular group types are 'three or more adults with no children,' (23.6%) and 'one adult without children,' (16.7%).

Table 2 summarizes the overall average trip expenditures incurred by the visitors during a trip. The incurred expenditures are for all travel members and for the entire duration of the trip. The fact that most of the respondents are on day trip may imply that a significant amount of the expenditures are spent on one day.

Table 2
Overall Trip Expenditure of Respondents by Category

Please indicate the dollar amount spent for all travel party members and for the entire duration of your LAST casino/racino visit to the Midwestern state for each of the following expenditures categories:	Average Trip Expenditures in Dollars	Standard Deviation
Betting Wagering		
Dollar amount spent on casino/racino betting and wagering:	$180.88	$66.21
Accommodation Expense		
Dollar amount spent on all types of accommodations (hotels, motels, and other types of lodging):	$144.64	$15.21
Transportation Expense – non fuel		
Dollar amount spent on all types of transportation	$49.72	$48.58
Fuel Expense		
Dollar amount on gas/fuel for all vehicles used:	$30.25	$27.47
Tolls Expense		
Dollar amount spent on parkway or highway toll charges:	$7.17	$6.89
F & B Expense		
Dollar amount spent on food and beverage at restaurants and foodservice outlets of all types:	$34.00	$28.22
Groceries Expense		
Dollar amount spent on groceries:	$28.21	$19.76
Souvenir Expense		
Dollar amount spent on souvenirs:	$47.00	$38.66
Other Non-Food Expense		
Dollar amount spent on other non-food merchandise (clothes, medicines, other retail items, etc.):	$53.59	$45.52
Entertainment Expense		
Dollar amount spent on entertainment and registration fees (event tickets, conference fees, etc.):	$103.66	$86.52
Miscellaneous Expense		
Dollar amount spent on other miscellaneous expenses (auto repair, etc.):	$61.05	$67.30
TOTAL:	**$740.17**	**$ 40.94**

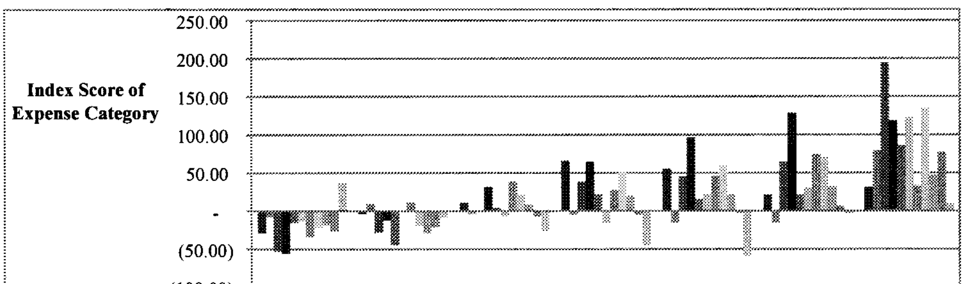
The expenditure categories were identified using previous research and after consulting with industry experts. The same categories were used throughout this research project for maintaining consistency and to more easily compare the results among the variables and their categories.

The results show that the visitors on an average spent $740.17 per trip on all trip-related expenditures. Typically, the visitors spent $180.88 on betting and wagering (24.3%), $144.64 (19.5%) on accommodation, and $103.66 (14.0%) on entertainment. Understandably, transportation, fuel, and tolls cost an additional $87.24 (11.7%). The visitors spend $62.21 (8.4%) on food at restaurants and groceries. Other minor expenses such as souvenirs, non-food items, and miscellaneous items account for the rest of the trip expenses.

Figure 1 presents an extension of the index scores where the expenditures for each category of expenses are compared with the mean for that category. A negative score means that the visitors in the specific category spend less than the average for all visitors for that category of expense. For example, in Figure 1, visitors travelling 'less that 25 miles' have a betting and wagering index score of -28.55. This means that compared to all visitors, visitors who travel 'less than 25 miles' spend 28.55% less than the average betting and wagering expenditures for all visitors. Similarly, the index score for visitors that travel 'more than 250 miles' is 30.56 for betting and wagering. This means that visitors who come from 'more than 250 miles' to the casinos and racinos, on an average, spend 30.56% more in betting and wagering compared to all visitors.

Using the above described method, one can identify the trends in expenditures by category of visitor. Figure 1, reveals the following trends: expenditures in all categories are increasing with increase in distance travelled except of miscellaneous and accommodation expenses, and visitors from further away tend to bet and wager more than visitors living in the neighborhood.

Figure 1
Index Score of Expenditure Category by Distance Traveled



Expenditure Category	Less than 25 miles	25 to 49 miles	50 to 74 miles	75 to 99 miles	100 to 149 miles	150 to 250 miles	More than 250 miles
Betting Wagering	(28.55)	(3.55)	10.65	65.50	55.25	21.16	30.56
Accommodation Expense	(8.05)	9.46	(3.46)	(4.31)	(16.03)	(15.18)	78.88
Transporation Expense	(52.61)	(28.42)	(1.05)	38.31	45.09	64.04	194.40
Fuel Expense	(55.71)	(12.07)	31.23	63.85	96.10	128.22	118.20
Tolls Expense	(15.55)	(44.25)	3.31	21.73	15.17	20.57	85.85
F & B Expense	(13.54)	(1.59)	(6.77)	(15.24)	21.62	30.63	122.41
Groceries Expense	(33.76)	11.06	38.83	27.60	45.32	73.68	32.92
Souvenir Expense	(21.99)	(19.15)	20.57	50.71	59.57	70.21	134.04
Other Non-Food Expense	(18.40)	(28.91)	8.07	19.73	21.28	32.48	46.16
Entertainment Expense	(26.44)	(20.76)	(6.98)	(5.05)	(2.57)	6.12	76.86
Miscellaneous Expense	35.95	(8.27)	(26.29)	(44.31)	(59.05)	(3.36)	9.20

The visitors experience greater amounts of expenditures in all expense categories with increase in the number of nights stayed. However, the expense categories increase at different rates. Day trip visitors' expenditures are lower than average in all categories of expenses. Visitors who come only for a day trip spend an average of $581.06 while visitors staying for more than 5 nights spend $1,993.00 per visit. The greatest increase in expenditure categories in terms of nights stayed seems to be for F&B expenditures which increased to 276.44% greater than the average for all visitors when the visitors stay for five or more nights. Transportation expense and accommodation expense also show similar increases of 243.96% and 242.21% respectively.

The visitors experience greater amounts of expenditures in all expense categories with increase in the number of nights stayed. However, the expense categories increase at different rates.

Visitors who stay in the casino hotels at the destination, other hotels at the destination, or at rented cabins or homes bet and wager about 60% higher than the average for all visitors. On average, visitors that are on day trip or stay with relatives and friends, wager about 6% less than the average for all visitors. Visitors who stay in the casino hotels at the destination, or at rented cabins or homes expend about 35% more on entertainment than the average for all visitors. Visitors staying in rented cabins or homes spend about 271% more on food and beverage expenditures compared to the average for all visitors in that category.

Visitors who use personal motorcycles or bikes incur less expenditures in all categories expect for betting and wagering for which they spend 34.53% higher than the average for all visitors. Visitors arriving by commercial plane incur about 14.96% higher accommodation expenses than the average for all visitors. Visitors arriving by personal cars, bikes, or charter or tour buses all incur lower than average expenditures for accommodation. This may be because most of such visitors are on day trips. Visitors arriving by commercial airline also incur much higher expenditures on F&B (267.62%), souvenirs (155.32%), and entertainment (131.52%) compared to the average for all visitors.

Discussion and Conclusion

As indicated earlier, it is the intent of this research to be a starting point and to fill a research gap. This study is an overview of the visitors' travel characteristics and spending habits of a Midwestern state's casino and racino visitor and was not intended to be generalizeable beyond the purpose of this research. In that regard, it must be stated that limitations exist in the study. The results may not be generalizeable to casino and racino visitors in all states in which gaming outlets are provided. Additionally, the results may not be representative of the specific state's visitors as a whole due to the screening questions. It cannot be assumed that the results are generalizeable to specific facilities or regions within the state due to the lack of control of who chose to respond from the online consumer panel and having no specific questions indicating the specific establishments visited. With this being said however, some similarities were found between the sample in this study and previous studies. Like Braunlich's (1996) study, the vast majority of visitors in the study stayed less than one night. Additionally, like the Attaway and Morgan (1997) study, the majority of the visitors travelled by automobile.

Although there are few previous studies to compare to, a few suggestions can be made for Midwestern states with tribal casinos and racinos, based on this study. The first might be incorporating the use of billboards in a 50 to 100 mile radius of the facilities as a primary marketing source. This recommendation is based on the relatively even breakdown of resident and non-resident visitors in which about 75% had traveled less than 100 miles to visit their destinations and 95.9% used their own vehicle. Billboards were also the most popular source of hard information. Additionally, billboards increase visibility which might improve word-of-mouth, which was the number one method of receiving information. With a spread out geographic area, billboards might also be used to guide visitors to less visible operations. Another reason to target this specific distance from facilities is based on the index scores which show that visitors who travel between 75 and 99 miles spend 65.5% more in betting than the mean of the entire sample. The second highest wagering group was those who travelled 100 to 149 miles. They spent 55.25% more than the mean. Also, targeting a marketing effort on those who travel by motorcycle or bikes could be wise. The group spends 34.53% more than the average for all visitors in wagering and gambling activities. Since gambling is the number one profit center for these operations, a large difference such as this cannot be ignored.

Based on the findings, the majority of the visitors said they would visit the state for non-gaming activities but don't currently do so. This could indicate a need for additional facilities at the casino/racino locations or better marketing of outside activities in or around the gaming facilities. The mean lodging expenditure was $144.64, the mean food and beverage expenditure was $34.00, the mean souvenir expenditure was $47.00 and the mean entertainment expenditure was $103.66. Since the wagering mean was $180.88, the capture of any or all of these other expenditures could result in a more profitable operation or tourism region. Additionally, those who use sleeping accommodations bet 60% more than those on day trips. A limitation to this suggestion however may be the locations of some of the casinos or racinos. Tribal casinos in more rural and/or in unincorporated areas of the state may not find an increase in services to be cost effective and location within the nations may prove difficult for non-tribal businesses to open in the area.

For future research, further regionally-based investigation would be beneficial to individual gaming facilities or geographic areas to further understand the visitors who visit their specific area for gaming purposes. This investigation could perhaps glean information by which to better accommodate their desires and needs. Other tourism related businesses and the state as a whole could benefit by further study of what activities might entice visitors to come to the state and participate in non-gaming activities. This study is only a beginning, and further, more detailed characteristics of the state's regional casino visitors, their travel patterns and expenditure practices, should be used in tourism planning strategies to be adjusted to include this type of visitor who already is a vital part of tourism in the state.

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