

An Exploration Of Customer Retention Factors In Las Vegas Casino Resort Properties

Michael J. Petrillose

Kathleen Pearl Brewer

Introduction

Las Vegas casino resort hotels compete in an expanding and evolving environment. The projected visitor volume for 1998 was in excess of 30,000,000 people, of which 68 percent were projected to be return visitors. The total number of guest rooms for casino-resort hotels located in Las Vegas is currently 105,000 and will reach nearly 120,000 rooms by 1999 (LVCVA, 1998). With the 1998/1999 expansion that included the opening of Bellagio, the Venetian, Paris, and Mandalay Bay, as well as expansions planned by existing properties, more than 14,000 rooms were added to the market - most of them on the famous Las Vegas Strip.

While Las Vegas casino-resorts enjoy a current occupancy rate of 90.3% (down from 93.4% in 1997) many hotel executives are concerned about maintaining high occupancy rates with the current expansion rate. Not only is competition fierce in the number of choices a guest has in terms of room availability, but high occupancy rates are necessary for other components of the casino-resort to be profitable. Today's mega-resorts are a combination of rooms, restaurants, show-rooms, gaming entertainment, retail stores, and arcade or other themed virtual entertainment experiences. Occupancy rates of over 90% are necessary to keep the entire operation profitable, or a domino effect occurs reducing or eliminating profits in the ancillary areas (Personal interview, J. D. Clayton, Assistant Vice President of Casino Operations for MGM Grand in Las Vegas, NV, December, 1997).

It is in the context of this explosive growth, coupled with managements' concerns about how to entice customers to return to their property with so many other options available, that this study was conceived.

To determine what factors might influence a customer's decision to return, the researchers investigated several sources. Contemporary customer retention and loyalty literature was reviewed and industry executives in Las Vegas Strip properties were interviewed. The literature described traditional guest satisfaction and service quality issues as major components of retention. The executives cast

*Michael J.
Petrillose, Ph.D.,
Regional Vice-
President,
Neighborhood Inns
of Chicago*

*Kathleen Pearl
Brewer, Ph.D.,
University of Nevada,
Las Vegas*

doubt on the applicability of such theories for the Las Vegas market. As a result of the information provided, this study was conducted to examine factors that influence a guest's intent to return to a particular Las Vegas casino-resort property in today's expanding and evolving environment.

Review of Literature

Contemporary Literature on Customer Retention and Satisfaction

Today many companies are in a rapid state of transition. Customers are providing companies with powerful wake-up calls, usually with their money as the alarm clock. Simply offering the best products, services, or prices alone may not be enough to ensure loyalty. As a result, companies have tried to identify what their customers want and then set up satisfaction programs accordingly.

Richard and Adrian (1996) suggested that casino repeat purchase intention is a function of the location of the casino, the physical attributes of the casino, the games offered at the casino, the extra amenities of the casino, hospitality attributes of the casino, and the attributes of the casino staff. The authors stated that no one set of attributes can fully explain repeat purchase intentions, as consumers utilize several attributes when deciding to return to a gaming casino.

Lowenstein (1995) implied that assuming customers are satisfied has become a panacea for maintaining or increasing sales, but the concept and drive for satisfied customers generally has proven far less than satisfactory for companies seeking higher sales and profits, greater quality levels, and more cultural cohesion among staff. These objectives are more readily met by applying activities and resources to customer retention. But, does a high level of satisfaction mean that customers will be loyal when faced with new choices in the market place that also promise the same or superior levels of service and satisfaction?

Casino executives interviewed while in preparation of this instrument expressed concerns about guests selecting properties based solely on their new or unique offerings in the marketplace. Bowen and Lawler (1995) suggested that companies can clearly benefit by increasing the lifetime spending of customers. Most companies, however, concentrate a highly disproportionate amount of resources on at-

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tracting and acquiring customers, far less on keeping them. The conventional wisdom is that once acquired, customers will remain loyal if the organization offers superior products and services. This conventional wisdom, expanded to mythical levels in recent years, has a major drawback. Expressions of “guaranteed satisfaction,” “highest quality” and “knock- your-socks-off service” now generate little interest among customers. They contribute in a one-dimensional way, if at all, to a customer’s relationship with a provider because many companies offer the same features (Bowen and Lawler, 1995). While offering superior products and services is critical to a company’s ability to retain guests, in Las Vegas the continuous construction of new and uniquely different mega-resorts provides management with additional challenges, and raises the question of how customers in the Las Vegas market will react to “service” versus a “new experience”.

The literature suggests a number of companies have discovered the benefits of identifying customer service breakdowns as one reason why customers opt for a new service provider or experience. An example of this occurred in 1991 with British Airways’ Customer Relations Department, which took more than 12 weeks on average to respond to customer correspondence. It lost 60% of calls from customers on any given day, and the cost of compensating customers with grievances was rising rapidly. To champion the customer, British Airways’ new management team instituted four objectives: (1) to use customer feedback more effectively in order to improve the quality of the airline’s service; (2) to strive to prevent future service problems through teamwork; (3) to change the approach to customer compensation; and (4) to practice customer retention, not adjudication. The retention rate among those customers who complained to Customer Relations more than doubled to about 80%, while the return on investment increased 200% (Weiser, 1995).

Fay (1995) implied that satisfied customers may be in either an attrition or defection process, and the unsuspecting company, focusing on satisfaction, will be totally unaware of these conditions. The author suggested that while it may be intuitive that simply increasing customer satisfaction will increase retention (and therefore profits), the facts are contrary.

Between 65 percent and 85 percent of customers who defect say they were satisfied or very satisfied with their former supplier. A close evaluation of customer needs, specific transactions, complaints, expectations, and perceptual gaps between the customers and service revealed that service, product, promotion, and communication performance attributes directly impact customer retention providers (Fay, 1995; Reichheld and Sasser, 1993). Reichheld and Sasser (1993) suggested the real quality revolution was just reaching the service industry. The authors implied that service companies were just beginning to understand what their manufacturing counterparts learned in the 1980’s – that “quality doesn’t improve unless you measure it.” Reichheld and Sasser indicated that customer defections have a surprisingly powerful impact on the bottom line. Customer defections can have more to do with a service company’s profits than market share, unit costs, and many other factors usually associated with competitive advantage. As a customer’s relationship with a company lengthens, profits rise. The authors implied that companies can boost profits by almost one-hundred percent simply by retaining five percent more of their customers.

While the existing body of research implies that superior service and satisfied customers will generally bring customers back, many Las Vegas hotel executives question the application of these theories to the ever changing Las Vegas market. This study was undertaken to examine factors important for repeat guests in this unique environment.

Concerns of Executives

The five casino-resort hotel executives interviewed expressed very similar concerns. They all described the importance of maintaining high occupancy percentages and were concerned about the impact of new properties on their ability to compete. Perhaps feeding this concern are ancillary data reported by various local groups that seem to point to visitors flocking to the new properties. One example of such data was a question on a 1996 LVCVA survey where an overwhelming number of people said that the new New York New York Hotel and Casino was their favorite property.....before it opened! Occupancy data for 1997, after the opening, supported this popularity, with the property frequently having 100% occupancy (LVCVA, 1998). The question most salient on the minds of the executives was, "Is this 'newness or theme' factor really that important?" Or, "Is satisfaction with a current product a method to counter the 'newness' factor?" And last, "Is the old price/value concept used in Las Vegas in the past still a method to generate repeat business?"

Methodology

Focus Group Study

The primary purpose of the study was to assist Las Vegas casino-resort hotel management in increasing guest loyalty/retention to their property. The research problem investigated was: In an expanding and evolving environment, what factors will influence a guest's intent to return to a particular Las Vegas casino-resort property. This question generated two subquestions, derived from the results of Richard and Adrian's 1996 study of the determinants of casino repeat purchase intentions.

What is the impact of service quality and guest satisfaction on a guest's intent to return to a particular Las Vegas casino-resort property (e.g., to return to the MGM Grand)?

Which factors most influence the guest selection of a casino-resort hotel on future visits?

Three locations in Las Vegas were used to recruit individuals for the focus groups. The study was confined to guests of casino-resort properties, excluding non-gaming properties or visitors not staying in hotels. The focus of the research was to determine "return" factors, therefore, it was necessary to solicit guests who had previously experienced a casino-resort property.

Research Design

The exploratory method used for this study was the qualitative technique of focus groups. Initially conceptualized by Merton and Kendall (1946), focus groups have emerged as an accepted research method for a wide variety of private and public sector studies (Billson, 1995). Focus groups allow a targeted sample from the population to respond in an interactive environment, permitting probing of the issues in question.

The use of focus groups as a research method has its detractors. Since a focus group encourages in-depth responses, frequently after probing by the moderator or as a reaction to another group member, the reliability of focus group data has been questioned (Krueger, 1988; Morgan, 1988). While these concerns should not be ignored by researchers, the impact of the method on reliability has just begun to be explored (Swenson, Griswold & Kleiber, 1992). The strength of the focus group method lies in its ability to probe themes and topics, and to record the issues, concerns, or perceptions that emerge from the group discussion (Krueger, 1988, pp. 44-45). Krueger (1988) believes that focus groups are a naturally occurring phenomenon, and that this natural interaction enhances data collection. In the environment of the casino-resort, the researchers believed that focus groups would yield the most interesting and insightful responses to the research questions.

In a focus group, a small number of people (6 to 20) are brought together in a room to discuss a topic. The participants are selected because of their connection to the topic. The purpose is to explore or probe the issue rather than to describe or define it in any conclusive terms.

A moderator guides the discussion, keeping the discussion on track, and making sure that all individuals participate. Krueger (1988) listed five advantages to focus groups:

1. flexibility;
2. high face validity;
3. time (quick results);
4. low cost; and
5. captures real-life data in a social environment.

The last advantage concerning the "real-life" nature of the process counters concerns about more contrived methods that may be too alien or structured to explore some questions (Babbie, 1992). Six to eight focus groups were planned, a number sufficient for the exploratory nature of the study (Lamp, 1995; Greenbaum, 1988; Morgan, 1988; Welch, 1985). While information concerning the precise number of groups and group participants that would be optimal varies, Welch (1985) states that at least two focus groups are necessary, but new information and ideas diminish by the eighth group.

Due to the questions and concerns raised by casino executives, it was determined by the researchers that the casino resort properties participating in this study should be large properties (between 1,500 - 5,000 rooms), similar in amenities and entertainment available, but different with respect to the age of the property.

Rewards for participants are an important part of focus group success. In exchange for the summary data resulting from the study, selected casino-resorts were asked to donate show tickets, dinner coupons, or other rewards to the focus group members. Additionally, they were asked to supply a meeting room for the focus group sessions to be conducted.

The researchers solicited subjects from three locations on the Las Vegas Strip, including a casino-resort retail area, a casino-resort food service area, and a walkway from a casino to other resort attractions. The three locations were within a mile of each other. Subjects were screened, using a screening questionnaire, to determine if they met the qualifications for subjects in the study. Subjects invited to participate in the study were asked if they were currently staying at a Las Vegas casino resort property. Potential participants who responded they were currently staying at a Las Vegas casino resort property were then asked if they intended to return to Las Vegas. This criterion met, each participant was given a document specifying the voluntary nature of the focus group and the anonymity of all responses. Once selected, each participant completed a demographic questionnaire at the beginning of the session.

A guided interview sheet was developed for the moderators of the focus groups to follow during the sessions. The questions probed by the moderators, as discussed individually in the results and discussion section, helped the group members to define their personal service quality standards, as influenced by their experiences and values. Additionally, the questions explored factors that either positively or negatively influenced their intent to return to a particular property. The results of this discussion were used to assist participants in assessing their current Las Vegas stay.

A combination of audio/video tapes and handwritten notes were used to evaluate the responses and discussion of the participants during each session. Data from the sessions were examined to identify recurrent themes and issues concerning major motivation factors impacting the guest's choice of property for his/her next Las Vegas visit. The findings were then compared to other themes that have been developed in other studies of guest retention to determine what differences, if any, exist in this unique environment.

Limitations of the Study

Focus groups, because of their voluntary nature, have the potential of being biased. While participants were screened to insure the two primary characteristics, staying at Las Vegas hotels and intent to return, the homogeneity of the groups was not controlled. Additionally, the researchers were asked not to solicit participants from the casino area, potentially eliminating some types of participants.

Results And Discussion

Demographic and Trip Characteristics

The study included eight focus groups with an average of nine participants per group. The participants were limited to guests staying at casino-resort hotels. Table 1 compares the focus group characteristics to the Las Vegas visitor profile identified by the Las Vegas Convention and Visitors Authority (1998).

Table 1
Comparison of Sample and Population Characteristics

Characteristic	Focus Group	Population Profile
Age	51.3	49.4
Gender:		
Male	41.7%	51%
Female	58.3%	49%
First Time Visitor	28%	32%
Nights Stayed:		
1-2	18.2%	
3-5	54.5%	*
6 or more	27.3%	
Pleasure/Vacation	92%	71%
Business Convention	8%	15%
Education:		
High School	33%	NA
Technical School	5%	NA
2 Year College Degree	9%	NA
4 Year College Degree	51%	NA
Graduate Degree	2%	NA

* Las Vegas Convention Visitors Authority (1998) average nights stayed 3.5
NA = Not Available

When asked to identify their primary reason for this visit to Las Vegas, 92% of the focus group participants indicated that they were on vacation, while 8% stated they were either in Las Vegas on business or attending a convention. The participants who responded that either business or a convention were the primary reason for the trip, stated that they included many activities that would be considered entertainment or vacation activities. When asked to indicate their intended length of stay, 18.2% of the participants responded one-to-two nights, 54.5% responded three-to-five nights and 27.3% indicated they intended to stay six or more nights. Travel agents were used by 49% of the focus group participants to book their hotel reservation, while 38% of the participants booked their reservations by themselves. The remainder either had not made reservations or were “casino guests”. The focus group members were asked, “at what type of property do you generally stay when traveling”. Six percent indicated that they stay at upscale properties, 57% stay at midscale properties (e.g., Holiday Inn, Ramada Inns, Sheraton) and 25% stated that budget/economy (e.g., Motel 6, Fairfield Inn, Hampton Inn, Comfort Inns) hotels were their usual choice. Ten percent frequently stayed in “extended stay” properties, while the remaining 2 % did not respond. Table 2 displays the income levels of the participants who responded to the question on the demographic questionnaire. This information provided the researchers with basic information about the general service levels experienced by the focus group members and how they used this experience in defining quality and service standards.

Table 2
Reported Income Levels of Participants

Income Category	Frequency
\$0-\$20,000	4
\$20,000-\$40,000	23
\$40,000-\$60,000	21
\$60,000-\$80,000	13
over \$80,000	19
No response	17

The Impact of Service Quality and Guest Satisfaction

Questions addressing the participants’ standards of service quality and guest satisfaction as well as their personal experiences were asked. These questions evoked responses both about standards and experiences at hotels in general, and specific discussions about experiences in Las Vegas casino-resort properties.

Description of Current Hotel Stay

The researchers asked focus group participants to describe their current hotel stay (i.e., How are things going?). A vast majority responded that the current visit was going well and that they were enjoying their stay in Las Vegas. While a few negative comments regarding traffic and the airport were mentioned, the only hotel-related negative comment concerned long waits in check-in lines at the front desk. The overall impression from the groups was that they were generally “having a good time” in Las Vegas.

Guest’s Definition of an Excellent Hotel Experience

To begin the examination of participants’ quality and satisfaction standards and experience in general, participants were asked to describe an excellent hotel experience. Participants responded that an excellent experience was one where the hotel’s employees were courteous, friendly and helpful. Guests suggested their needs should be anticipated by the hotel and its employees. All of these are responses that would be expected and supported by previous research (Bowen and Lawler, 1995; Richard and Adrian, 1996). In addition, participants implied the hotel should strive to exceed what guests would normally expect, if

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they truly want to keep a customer for life. Other components of an excellent hotel experience were cleanliness of hotel facility and guestroom, and employee smiles. Issues that were described as being perhaps more important in Las Vegas than other hotel locations were the ability of hotel employees to give directions and helpful suggestions (e.g., sights-to-see, restaurants, churches, shopping, hospitals), and highly visible hotel security. Group participants gave examples of positive experiences with employees who went the extra mile, and/or simply answered questions with courtesy and enthusiasm, even though they had been asked the question a thousand times that day (e.g., which way to the front desk, restroom, and/or front door). However, the personal touch with strong and positive employee/guest interaction was clearly the mark of an excellent experience. No amount of theme or creative environment could match the power of well-trained, personable employees.

When talking in general terms about service and satisfaction, participants agreed that for normal travel situations, traveling across country or visiting a city, they did

return to either specific properties or chains in which they had a positive experience. Here traditional satisfaction and retention issues seem to hold true.

Negative Hotel Experience That Would Ruin Guests Hotel Stay

The flip side of a quality or good experience are the problems. The researchers expected to hear the reverse of the positive experience and were not disappointed. When asked to describe a negative hotel experience that would ruin their stay, participants provided the following examples: (1) lack of cleanliness, (2) lack of security, (3) indifferent attitude by a hotel employee, (4) promises made by the hotel and not honored (i.e., assigned room type other than type requested), (5) poor quality food in restaurants, and (6) long lines requiring waits of more than fifteen-to-twenty minutes. While most of the focus group participants suggested that a sincere apology and a small gesture by the hotel would enable the hotel to recover from these negative guest experiences, a number of the focus group participants indicated they would never return to a hotel after a negative experience because there were too many other choices available. Many of the problems identified focused on employee indifference, lack of communication by hotel, and long lines that required more than a fifteen-to-twenty minute wait. Most significant here is the fact that the hotel has no idea at this point of the guest's dissatisfaction and intention to not return. It became apparent that if the hotel established a periodic follow-up with each guest during their stay, problems could be corrected prior to the guest's departure. While many positive comments were made about the number and visibility of security and police personnel, the majority of the focus group responses centered on concerns with safety and security in casino-resort properties.

Occasionally, some of the problems are uncovered at checkout, however, this is dependent upon the quality of the employees and their ability to solicit guest feedback. Again, the employee-guest encounter is critical and essential to the operational effectiveness of the hotel. Focus group members stated that if hotels want their employees to go beyond the basics and give the extras to the hotel's guests, hotels need to develop and provide intrinsic and extrinsic rewards that challenge employees to deliver a higher quality of customer service. Once again, the responses were centered far more around service than any other response.

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Recovery From Negative Hotel Experience

It was interesting to discover what would mitigate the guest's negative experience. While a small number of the participants implied they would never return to a hotel after a negative experience, most of the participants indicated they would return provided the hotel responded in the following manner:

1. Sincere apology by the hotel's employees and management to the guest.
2. Small gesture by the hotel to the guest. This gesture should reflect the severity of the situation. For example, if a guest requesting a non-smoking, king-size room was checked into a smoking, king-size room, the guest would expect the hotel to correct this problem by simply moving the guest to another room that is non-smoking. This represents the minimum guest expectation. The hotel could exceed the guest's expectation by upgrading the guest to a non-smoking suite at the same rate as the previous lower-priced room type. Obviously, this would create a memorable and lasting impression in the guest's mind and positively impact the guest's intent to return.
3. Negative experiences, like guest room robbery or car theft, can be positively handled by providing the guest with complimentary phone calls to contact their insurance company or to make alternative arrangements. Participants who had experienced this unfortunate situation, in most cases, felt abandoned by the hotel property and were left to fend for themselves. Regardless of the hotel's liability, guests expect the hotel to assist them in their time of need.

The issue of comps and upgrades may be more salient in Las Vegas, because most guests are aware of the comping policies of casino-resorts for "special" customers. Knowing that comps are not unusual may raise their expectation of some sort of upgrade or comps as a response to any problem. While it was clear that comps and discounts play a large part in turning around a negative experience, the most important thing that a property can do is truly acknowledge that there is a problem, and then act promptly to correct it.

Factors Influencing Selection of a Casino-Resort Hotel on Future Visits

This question was at the heart of the concerns expressed by casino-resort executives: What impact does the age (newness) or theme have on your choice of hotels in Las Vegas? Focus group participants were divided on the major factors influencing their hotel selection. As feared by casino-resort executives, approximately 50% of participants felt that the reputation of visibility of the property (new and/or exciting) was the most important factor in their hotel selection. National marketing campaigns, travel agent promotions, and other marketing strategies appear to have worked in making this factor salient. Many of these individuals, including those who under normal travel situations are loyal, stated that it did not matter how a casino-resort property performed in terms of service quality or guest satisfaction, as they intended to stay at a different property on their next visit for a new experience. Other participants stated that the theme of the hotel was only a

consideration in their selection when the selection of the property was tied to a specific purpose of their visit (e.g., family vacation, honeymoon, business/convention). On a more hopeful note for casino executives, another approximately 30% of the participants identified the perceived price/value of the hotel property as being the major force in their decision of where to stay. For this set of participants, the physical plant (i.e., facilities) influenced the selection decision when the appearance of the facilities and the preventive maintenance standards established and enforced by the hotel were not being consistently maintained. While this group enjoyed the themed properties, they stated that they could “visit” these properties and enjoy all the amenities and

stay at a less expensive hotel. Additionally, this group’s expectation of service quality in these price/value properties was lower, and they were willing to tolerate more inconveniences in terms of wait time for housekeeping and at the front desk. The remaining individuals were either loyal to a property or set of properties (e.g., downtown, or “Old Vegas” properties such as the Riviera, Sahara, Frontier).

There was a noticeable age difference between the “must have the new experience” group and the “price/value” group. The price/value group tended to be generally older and had made more trips to Las Vegas than the “new experience” group. Again, a little disheartening for casino-resort executives who are looking to the baby boomers and beyond as the future market for Las Vegas.

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Summary And Conclusions

Most significant was the finding that guests were satisfied with their current stay, but did not intend to return to their current hotel on a future visit to Las Vegas. Most discouraging to hear was that most of the participants simply wanted a “new” experience. This may be a result of the recent construction. However, as the construction of newer theme properties decreases, guests will return to those properties that provided the best overall experience in the past. Price/value is still salient for many Las Vegas visitors. While the days of cheap meals and rooms may be gone, delivering value for the dollar is clearly still important.

Further, the participants indicated that the traditional standards for quality such as property cleanliness, security, courtesy, friendliness, and helpfulness of employees are basic expectations that each hotel should consistently deliver. In addition, participants implied that problems with cleanliness, security, and the quality of the hotel’s employees are reasons for not returning to a particular property and, therefore, should not be overlooked by the hotel’s management. This finding is consis-

tent with the findings of other research studies (Bowen and Lawler, 1995; Richard and Adrian, 1996).

It was very clear that any examination of factors that influence guest decisions should center around employee performance in high guest contact jobs. Participants in these focus groups consistently cited personal service as being the standard of excellence as well as the focus of major problems. Millions of dollars are spent on the physical attributes of properties, however, this study would indicate that managers should pay a great deal of attention to selection and training of employees to provide outstanding attentive/personal service.

Therefore, properties that commit resources today and consistently provide quality service to their customers will realize the benefits of this strategy in the future as construction slows and the attractiveness of newer theme properties decreases.

There were some comments that were more specific and would keep some of the people in this study from staying at new properties. Several of the participants who were older than 60 described two of the newer properties as being too noisy and crowded. The "lively" atmosphere may be what the designers were striving for, however, some individuals were clearly looking for a more quiet restrained environment. So while it appears that many would simply go for the new properties, some part of the market may be lured away with atmosphere (not necessarily theme).

The structure of this study limits the use of the results. In the highly unique and competitive Las Vegas environment, the motivators identified by the study may not be generalizable to other resort-hotel environments. Many interesting factors were identified by this set of focus group participants. Their responses would indicate that further studies should be done to explore these factors in greater detail.

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