

Press Release

J.D. Power and Associates Reports: A Vast Majority of Southern California Indian Gaming Casino Customers Express Desire for a Smoke-Free Environment

Barona Valley Ranch Resort and Casino Ranks Highest in Satisfaction With the Casino Experience in Inaugural Study

WESTLAKE VILLAGE, Calif.: 1 July 2008 —A large majority—85 percent—of gaming customers at Indian casinos in Southern California report that they would prefer a smoke-free environment in these casinos, according to the J.D. Power and Associates 2008 Southern California Indian Gaming Casino Satisfaction StudySM released today.

The inaugural study measures overall customer satisfaction based on performance in five key measures (listed in order of importance): gaming (33%); facility (27%); cage cashier/ticket redemption machine (17%); arriving/parking (15%); and beverage service (9%).

“Most casino customers have grown accustomed to dealing with large volumes of cigarette smoke in the air, but an overwhelming percentage indicate they would prefer to play in a smoke-free environment, which presents a major opportunity for improvement for casinos,” said Sam Thanawalla, director of the global hospitality and travel practice at J.D. Power and Associates. “While some establishments have already begun implementing smoke-free gaming areas in their facilities, customers may not be aware that this is an option. Those casinos that provide smoke-free gaming areas and also do a good job of educating consumers about them could benefit from increased attendance and higher satisfaction.”

Barona Valley Ranch Resort and Casino ranks highest in satisfying customers with a score of 737 on a 1,000-point scale and performs particularly well in four of five factors: arriving/parking; facility; gaming; and cage cashier/ticket redemption. Following in the rankings are Viejas Casino (724) and Pala Casino Spa and Resort (717), respectively. Viejas Casino performs particularly well in the beverage service measure.

The study also finds that a very low percentage—approximately 6 percent—of Indian casino customers in Southern California are “highly committed” to any one casino. On average, players make seven visits to Indian gaming casinos within a six-month period. Casino customers tend to visit more than one Indian gaming establishment during this time period, rather than return to the same casino each time.

“Those customers who are highly committed to a particular casino report that they experienced particularly high levels of enjoyment and excitement during their casino experience,” said Thanawalla. “These highly committed customers are nearly three and a half times more likely to recommend the casino to others, and nearly three times more likely to return to the same casino, compared with customers with low or medium commitment. Some of the ways casinos can maximize customer levels of enjoyment and excitement are to offer a wide variety of slot machines and table games, and to ensure that staff—including dealers, cashiers and beverage servers—are friendly and engaging. In addition, customers indicate that ease of locating the casino entrance upon arrival and being able to locate the cashier and ticket redemption machines are particularly important to overall satisfaction.”

The study also finds the following key patterns:

- On average, Indian gaming casino players in Southern California travel approximately 64 miles, each way, to visit a casino.
- Only 1 in 20 casino players (5%) report experiencing a significant problem during their casino visit. Of those customers who reported their problem to a casino employee, approximately one-third said their problem was resolved.
- Approximately 89 percent of casino customers play slot machines, while 48 percent play table games.

The 2008 Southern California Indian Gaming Casino Satisfaction Study measures [customer satisfaction of gaming players of Indian casinos in Southern California](#). Casinos included in the study have a minimum of 2,000 slot machines. The study is based on 1,766 responses from gaming players who visited an Indian casino in Southern California between December 2007 and June 2008. The study was fielded in May and June 2008.

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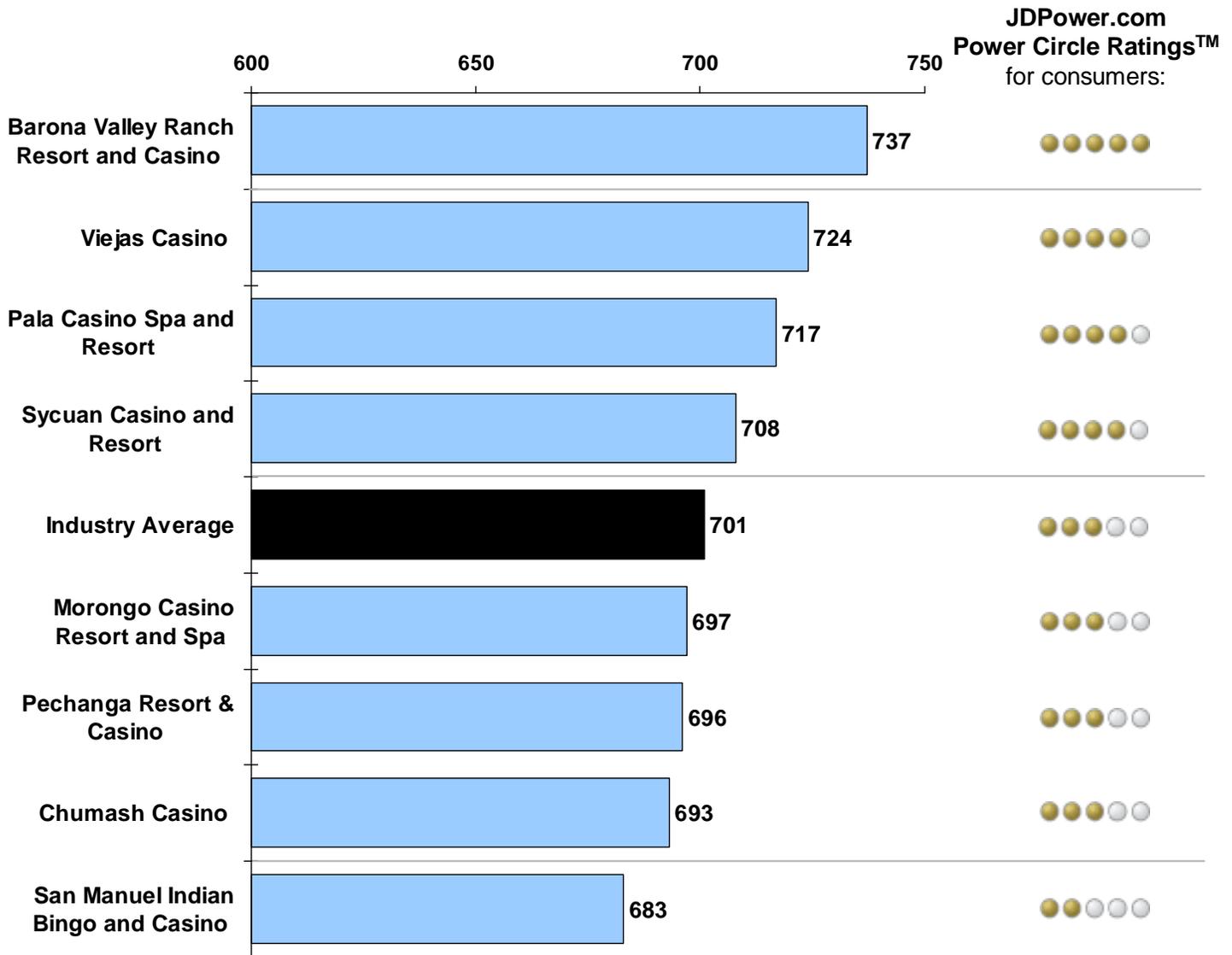
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NOTE: One chart follows.

J.D. Power and Associates 2008 Southern California Indian Gaming Casino Satisfaction StudySM

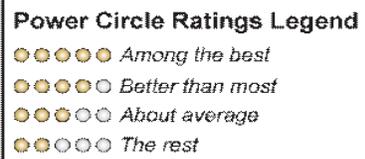
Customer Satisfaction Index Ranking

(Based on a 1,000-point scale)



Included in the study, but not ranked due to small sample size are: Soboba Casino, Spotlight 29 Coachella, Table Mountain Casino and Tachi Palace Hotel and Casino.

Source: J.D. Power and Associates 2008 Southern California Indian Gaming Casino Satisfaction StudySM



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