

Klas

Robinson QED  
HOSPITALITY CONSULTING



market & feasibility studies ∴ business plans ∴ economic impact

# POSITIONING YOUR DEVELOPMENT IN THE MARKET



Quod erat demonstrandum “which was to be proved”

# What about your Customers?

- Who are your current customers?
- Who will your future customers be?
- Where do they come from?
- What do they want +/- need?
- What do they expect?
- What will keep them
  - ...coming back?
  - ...staying longer?
  - ...visiting more often?

# SITE ANALYSIS

- *PROJECT DESCRIPTION / RECOMMENDATIONS*
- *LOCATION, LOCATION, LOCATION*
- *VISIBILITY*
- *ACCESS*
- *SUPPORTING DEVELOPMENT*

# SITE ANALYSIS



Populated Places	
Boundaries	
Transportation	
	Limited Access Highway
	Main Highway
	Other Highway
	Tunnel
	Toll Road
	Route Highlight
	Road Construction Route Highlight
	Road Closure Route Highlight
	Interstate Shield
	U.S. Highway Shield
	State Highway Shield
	County Highway Shield
	Trans-Canada Highway Shield
	Other Canadian Highway Shield
	Mexican Federal Highway Shield
Parks and Reserves	
Miscellaneous	
	Ferry



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# REGIONAL CHARACTERISTICS

## *DEMOGRAPHICS*

- *Population*
- *Income*
- *Employment*
- *Other*

## *TRANSPORTATION INFRASTRUCTURE*

- *Ground (Highway/Rail)*
- *Airport*

## *TRAVEL PATTERNS*

- *Tourism/attractions*
- *Visitor Statistics, Hotel Occupancy*

# LINEAR RADII VS. ACTUAL DRIVE TIME



**Pushpins**

- Sites
- 📌 My pushpins

**Populated Places**

- Major City (1,000,000+)
- City (500,000 - 999,999)
- Minor City (100,000 - 499,999)
- Town (20,000 - 99,999)
- Other Place
- 🏛️ National Capital
- 🏛️ Other Capital

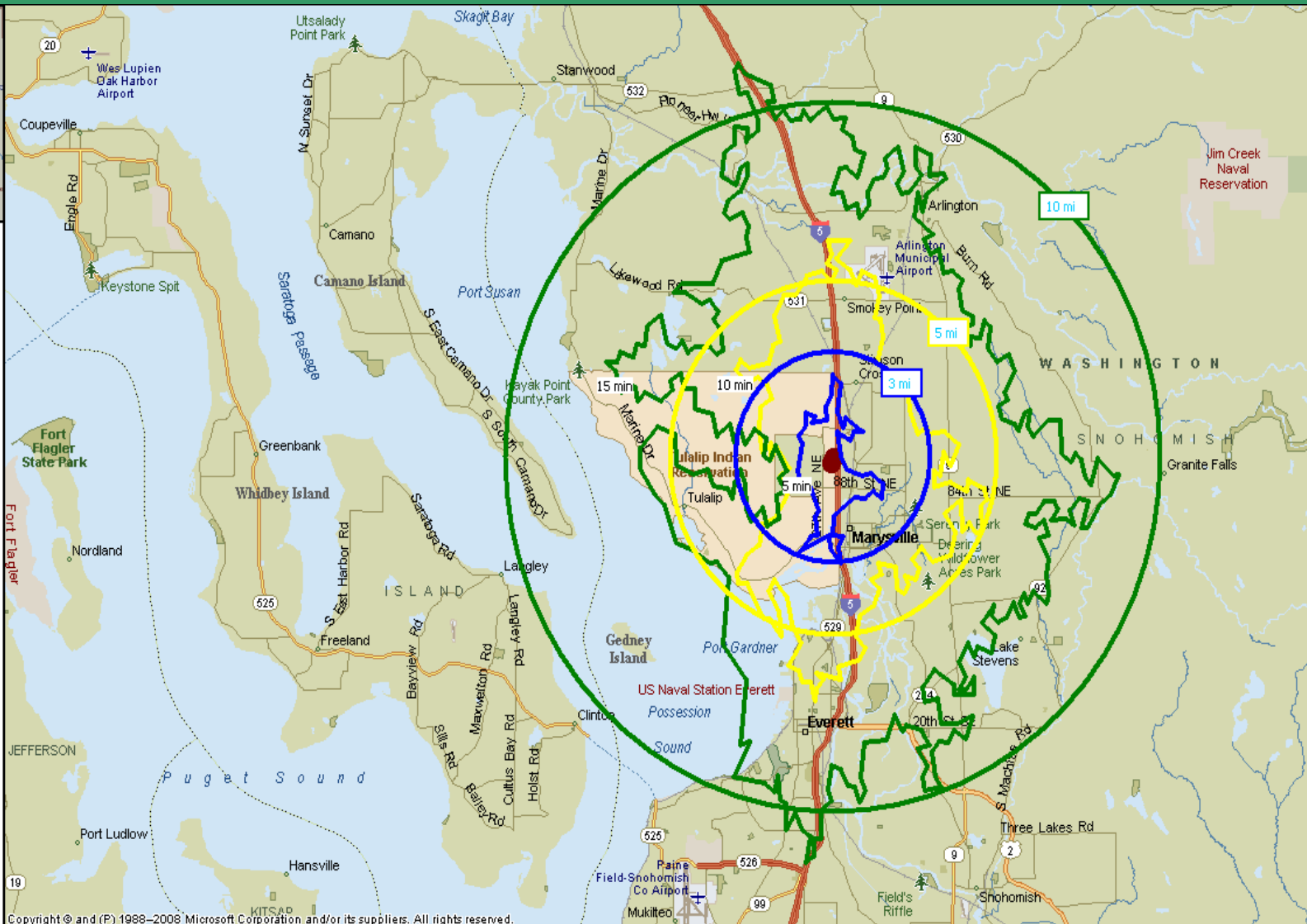
**Boundaries**

**Transportation**

**Parks and Reserves**

- 🌲 National Park or Reserve
- 🌲 National or State Forest
- 🌲 Other Park
- 🏞️ Indigenous Reserve
- 🏞️ Military Reserve
- 🌲 Small Park

**Miscellaneous**



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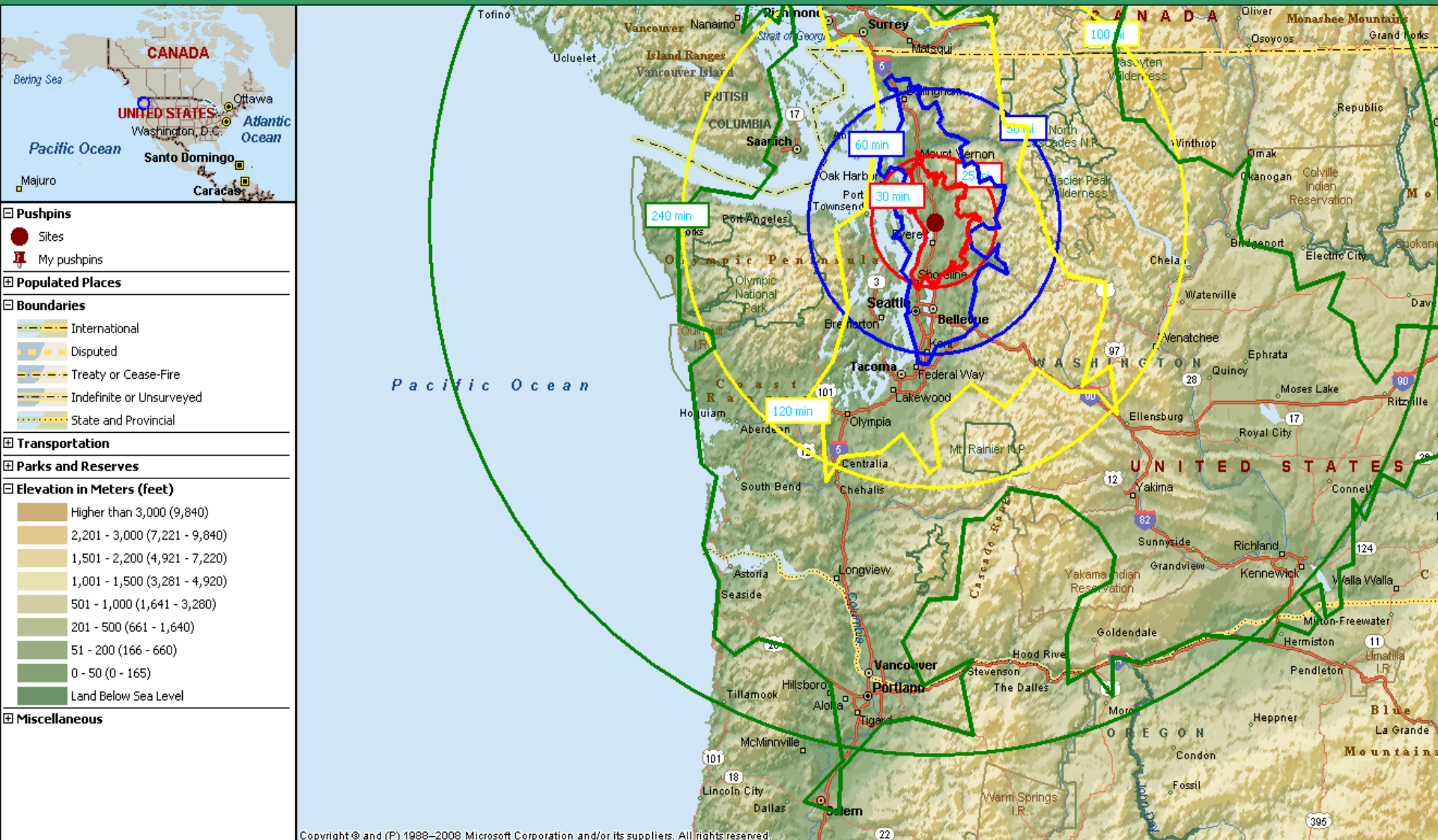
# POPULATION - LOCAL

Pop Facts: Population Quick Facts	Site A 3 mile ring	Site A 5 mile ring	Site A 10 mile ring	Site B 0 min - 5 min	Site B 0 min - 10 min	Site B 0 min - 15 min
<b>Population</b>						
2014 Projection	45,720	80,447	218,866	3,335	67,048	150,841
2009 Estimate	42,921	73,921	201,902	3,202	62,549	140,442
2000 Census	38,494	62,563	172,377	2,963	55,065	122,936
1990 Census	29,699	44,813	124,061	2,436	41,609	92,465
Growth 2009-2014	6.52%	8.83%	8.40%	4.15%	7.19%	7.40%
Growth 2000-2009	11.50%	18.15%	17.13%	8.07%	13.59%	14.24%
Growth 1990-2000	29.61%	39.61%	38.95%	21.63%	32.34%	32.95%
<b>2009 Estimated Total Population by Age</b>	<b>42,921</b>	<b>73,921</b>	<b>201,902</b>	<b>3,202</b>	<b>62,549</b>	<b>140,442</b>
Age 0 to 4	3,090 7.20%	5,358 7.25%	14,062 6.96%	265 8.28%	4,683 7.49%	9,811 6.99%
Age 5 to 9	3,146 7.33%	5,505 7.45%	13,959 6.91%	258 8.06%	4,669 7.46%	9,777 6.96%
Age 10 to 14	3,340 7.78%	5,870 7.94%	14,922 7.39%	248 7.75%	4,977 7.96%	10,179 7.25%
Age 15 to 17	2,010 4.68%	3,677 4.97%	9,608 4.76%	148 4.62%	3,080 4.92%	6,333 4.51%
Age 18 to 20	1,666 3.88%	2,932 3.97%	8,280 4.10%	120 3.75%	2,374 3.80%	5,823 4.15%
Age 21 to 24	2,077 4.84%	3,615 4.89%	10,831 5.36%	138 4.31%	3,024 4.83%	7,686 5.47%
Age 25 to 34	5,762 13.42%	9,165 12.40%	26,149 12.95%	406 12.68%	8,000 12.79%	18,694 13.31%
Age 35 to 44	6,628 15.44%	11,151 15.09%	30,550 15.13%	416 12.99%	9,440 15.09%	21,315 15.18%
Age 45 to 49	3,326 7.75%	5,913 8.00%	16,074 7.96%	223 6.96%	4,760 7.61%	10,818 7.70%
Age 50 to 54	3,005 7.00%	5,417 7.33%	15,089 7.47%	209 6.53%	4,352 6.96%	10,210 7.27%
Age 55 to 59	2,504 5.83%	4,511 6.10%	12,538 6.21%	208 6.50%	3,575 5.72%	8,551 6.09%
Age 60 to 64	2,004 4.67%	3,561 4.82%	9,796 4.85%	173 5.40%	2,928 4.68%	6,758 4.81%
Age 65 to 74	2,280 5.31%	3,997 5.41%	10,904 5.40%	219 6.84%	3,469 5.55%	7,757 5.52%
Age 75 to 84	1,385 3.23%	2,266 3.07%	6,247 3.09%	129 4.03%	2,171 3.47%	4,561 3.25%
Age 85 and over	698 1.63%	983 1.33%	2,893 1.43%	42 1.31%	1,047 1.67%	2,169 1.54%
Age 16 and over	32,657 76.09%	55,931 75.66%	155,701 77.12%	2,390 74.64%	47,167 75.41%	108,542 77.29%
Age 18 and over	31,335 73.01%	53,511 72.39%	149,351 73.97%	2,283 71.30%	45,140 72.17%	104,342 74.30%
Age 21 and over	29,669 69.12%	50,579 68.42%	141,071 69.87%	2,163 67.55%	42,766 68.37%	98,519 70.15%
Age 65 and over	4,363 10.17%	7,246 9.80%	20,044 9.93%	390 12.18%	6,687 10.69%	14,487 10.32%
<b>2009 Estimated Median Age</b>	<b>35.58</b>	<b>35.81</b>	<b>36.08</b>	<b>35.46</b>	<b>35.52</b>	<b>35.92</b>
<b>2009 Estimated Average Age</b>	<b>35.9</b>	<b>35.77</b>	<b>36.18</b>	<b>36.26</b>	<b>35.89</b>	<b>36.27</b>

# AVG. HOUSEHOLD INCOME

Pop Facts: Household Quick Facts	Site A 3 mile ring	Site A 5 mile ring	Site A 10 mile ring	Site B 0 min - 5 min	Site B 0 min - 10 min	Site B 0 min - 15 min
<b>Households</b>						
2014 Projection	16,612	28,576	79,160	1,261	24,369	55,566
2009 Estimate	15,535	26,220	73,084	1,201	22,736	51,754
2000 Census	13,779	22,037	62,262	1,092	19,937	45,198
1990 Census	10,595	15,798	45,809	873	15,188	34,831
Growth 2009-2014	6.93%	8.99%	8.31%	5.00%	7.18%	7.37%
Growth 2000-2009	12.74%	18.98%	17.38%	9.98%	14.04%	14.51%
Growth 1990-2000	30.05%	39.49%	35.92%	25.09%	31.27%	29.76%
<b>2009 Estimated Households by Household Income</b>	<b>15,535</b>	<b>26,220</b>	<b>73,084</b>	<b>1,201</b>	<b>22,736</b>	<b>51,754</b>
Less than \$15,000	1,059 6.82%	1,772 6.76%	5,679 7.77%	113 9.41%	2,238 9.84%	4,647 8.98%
\$15,000 to \$24,999	1,176 7.57%	1,777 6.78%	5,177 7.08%	159 13.24%	1,832 8.06%	4,112 7.95%
\$25,000 to \$34,999	1,377 8.86%	2,186 8.34%	5,946 8.14%	118 9.83%	2,041 8.98%	4,488 8.67%
\$35,000 to \$49,999	2,223 14.31%	3,721 14.19%	10,008 13.69%	133 11.07%	3,272 14.39%	7,360 14.22%
\$50,000 to \$74,999	3,759 24.20%	6,462 24.65%	16,746 22.91%	268 22.31%	5,241 23.05%	12,177 23.53%
\$75,000 to \$99,999	2,811 18.09%	4,598 17.54%	12,524 17.14%	181 15.07%	3,687 16.22%	8,391 16.21%
\$100,000 to \$149,999	2,567 16.52%	4,438 16.93%	12,251 16.76%	193 16.07%	3,491 15.35%	7,706 14.89%
\$150,000 to \$249,999	490 3.15%	1,077 4.11%	3,767 5.15%	28 2.33%	789 3.47%	2,235 4.32%
\$250,000 to \$499,999	53 0.34%	141 0.54%	779 1.07%	5 0.42%	108 0.48%	488 0.94%
\$500,000 or more	20 0.13%	48 0.18%	207 0.28%	3 0.25%	37 0.16%	150 0.29%
<b>2009 Estimated Average Household Income</b>	<b>\$69,308</b>	<b>\$72,186</b>	<b>\$74,878</b>	<b>\$64,665</b>	<b>\$67,259</b>	<b>\$70,804</b>
<b>2009 Estimated Median Household Income</b>	<b>\$62,852</b>	<b>\$64,136</b>	<b>\$64,529</b>	<b>\$57,229</b>	<b>\$59,469</b>	<b>\$60,820</b>
<b>2009 Estimated Per Capita Income</b>	<b>\$25,270</b>	<b>\$25,723</b>	<b>\$27,494</b>	<b>\$24,254</b>	<b>\$24,660</b>	<b>\$26,608</b>

# LINEAR RADII VS. ACTUAL DRIVE TIME



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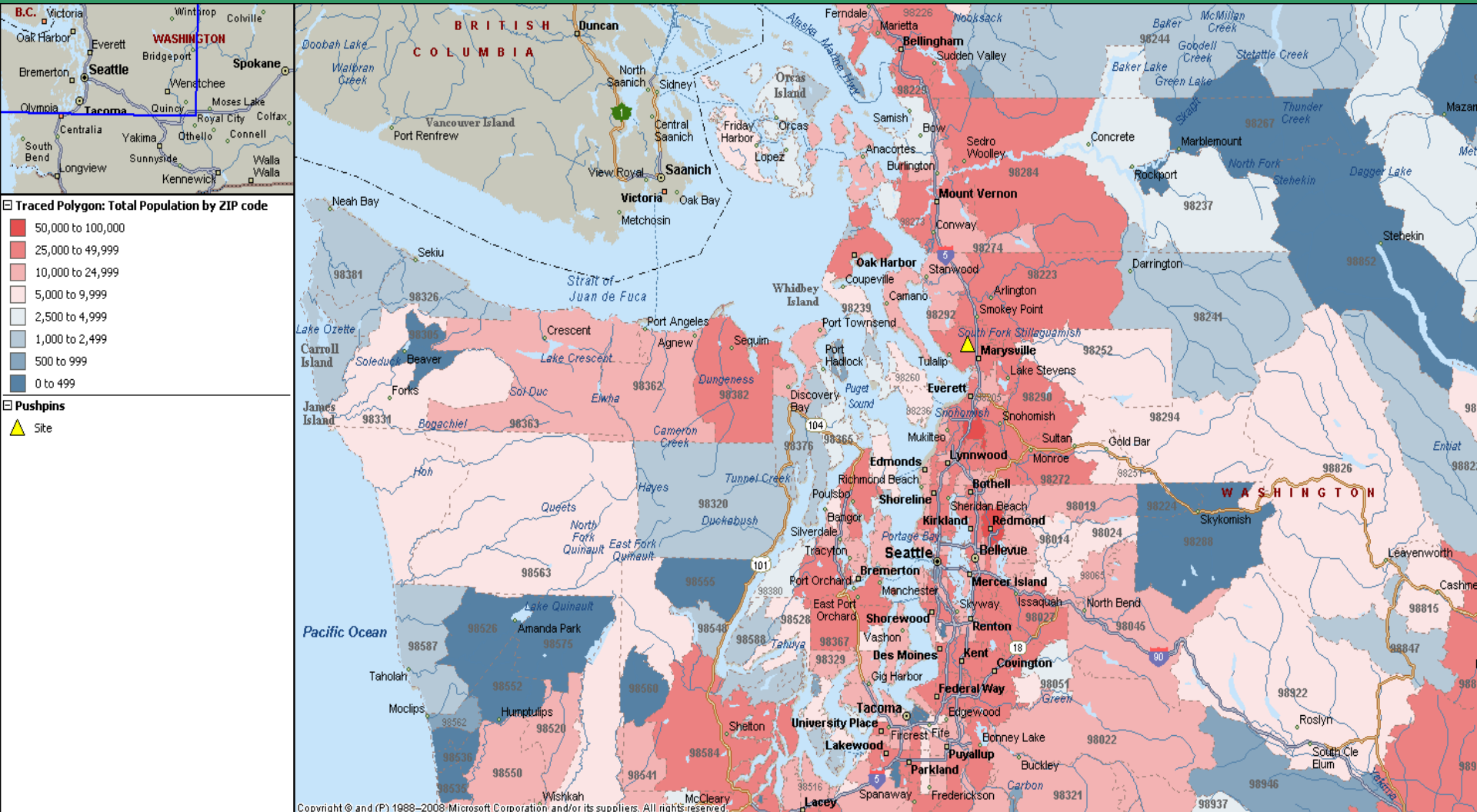
# POPULATION - REGIONAL

Pop Facts:	Site A		Site A		Site A		Site A		Site B		Site B		Site B		Site B	
Population Quick Facts	25 mile ring		50 mile ring		100 mile ring		200 mile ring		0 min - 30 min		0 min - 60 min		0 min - 120 min		0 min - 240 min	
<b>Population</b>																
2014 Projection	987,002		3,062,061		4,820,763		8,285,767		804,772		2,681,839		4,598,286		8,167,146	
2009 Estimate	923,428		2,895,632		4,539,416		7,775,447		750,903		2,532,821		4,330,422		7,662,843	
2000 Census	817,687		2,620,930		4,071,494		6,922,759		660,732		2,287,380		3,884,839		6,820,114	
1990 Census	645,424		2,196,974		3,376,011		5,679,594		517,889		1,922,947		3,226,261		5,584,568	
Growth 2009-2014	6.88%		5.75%		6.20%		6.56%		7.17%		5.88%		6.19%		6.58%	
Growth 2000-2009	12.93%		10.48%		11.49%		12.32%		13.65%		10.73%		11.47%		12.36%	
Growth 1990-2000	26.69%		19.30%		20.60%		21.89%		27.58%		18.95%		20.41%		22.12%	
<b>2009 Estimated Total Population by Age</b>	<b>923,428</b>		<b>2,895,632</b>		<b>4,539,416</b>		<b>7,775,447</b>		<b>750,903</b>		<b>2,532,821</b>		<b>4,330,422</b>		<b>7,662,843</b>	
Age 0 to 4	60,468	6.55%	175,157	6.05%	286,833	6.32%	509,039	6.55%	49,756	6.63%	154,571	6.10%	275,383	6.36%	505,118	6.59%
Age 5 to 9	59,798	6.48%	171,496	5.92%	279,642	6.16%	497,621	6.40%	49,364	6.57%	150,763	5.95%	267,952	6.19%	492,585	6.43%
Age 10 to 14	62,415	6.76%	174,494	6.03%	285,237	6.28%	505,808	6.51%	51,364	6.84%	152,011	6.00%	273,058	6.31%	499,493	6.52%
Age 15 to 17	40,402	4.38%	110,071	3.80%	181,930	4.01%	319,442	4.11%	32,505	4.33%	94,572	3.73%	173,403	4.00%	313,413	4.09%
Age 18 to 20	35,307	3.82%	110,451	3.81%	177,941	3.92%	302,935	3.90%	28,806	3.84%	97,153	3.84%	170,265	3.93%	298,547	3.90%
Age 21 to 24	45,126	4.89%	140,365	4.85%	226,521	4.99%	388,189	4.99%	36,861	4.91%	122,676	4.84%	216,255	4.99%	382,341	4.99%
Age 25 to 34	121,423	13.15%	393,805	13.60%	617,720	13.61%	1,069,983	13.76%	102,495	13.65%	352,013	13.90%	591,892	13.67%	1,060,313	13.84%
Age 35 to 44	136,222	14.75%	447,429	15.45%	676,253	14.90%	1,128,787	14.52%	114,216	15.21%	402,591	15.89%	652,740	15.07%	1,118,091	14.59%
Age 45 to 49	75,778	8.21%	232,579	8.03%	357,476	7.87%	593,020	7.63%	61,560	8.20%	205,196	8.10%	342,815	7.92%	582,978	7.61%
Age 50 to 54	73,361	7.94%	227,595	7.86%	349,671	7.70%	586,823	7.55%	58,774	7.83%	198,587	7.84%	333,853	7.71%	574,778	7.50%
Age 55 to 59	62,653	6.78%	202,345	6.99%	309,530	6.82%	527,475	6.78%	49,557	6.60%	174,521	6.89%	294,315	6.80%	516,061	6.73%
Age 60 to 64	48,501	5.25%	160,685	5.55%	247,249	5.45%	416,847	5.36%	38,108	5.07%	137,311	5.42%	234,051	5.40%	407,530	5.32%
Age 65 to 74	56,813	6.15%	187,964	6.49%	295,121	6.50%	503,838	6.48%	43,270	5.76%	156,876	6.19%	275,154	6.35%	492,300	6.42%
Age 75 to 84	31,486	3.41%	109,818	3.79%	171,401	3.78%	292,370	3.76%	23,667	3.15%	90,361	3.57%	157,821	3.64%	287,576	3.75%
Age 85 and over	13,675	1.48%	51,378	1.77%	76,891	1.69%	133,270	1.71%	10,600	1.41%	43,619	1.72%	71,465	1.65%	131,719	1.72%
Age 16 and over	727,002	78.73%	2,337,114	80.71%	3,626,045	79.88%	6,155,627	79.17%	589,354	78.49%	2,043,416	80.68%	3,455,257	79.79%	6,060,337	79.09%
Age 18 and over	700,345	75.84%	2,264,414	78.20%	3,505,774	77.23%	5,943,537	76.44%	567,914	75.63%	1,980,904	78.21%	3,340,626	77.14%	5,852,234	76.37%
Age 21 and over	665,038	72.02%	2,153,963	74.39%	3,327,833	73.31%	5,640,602	72.54%	539,108	71.79%	1,883,751	74.37%	3,170,361	73.21%	5,553,687	72.48%
Age 65 and over	101,974	11.04%	349,160	12.06%	543,413	11.97%	929,478	11.95%	77,537	10.33%	290,856	11.48%	504,440	11.65%	911,595	11.90%
<b>2009 Estimated Median Age</b>	<b>37.79</b>		<b>38.86</b>		<b>38.2</b>		<b>37.64</b>		<b>37.17</b>		<b>38.54</b>		<b>38.05</b>		<b>37.52</b>	
<b>2009 Estimated Average Age</b>	<b>37.51</b>		<b>38.66</b>		<b>38.18</b>		<b>37.85</b>		<b>37.04</b>		<b>38.37</b>		<b>38.01</b>		<b>37.78</b>	

# AVG. HOUSEHOLD INCOME

Pop Facts:	Site A		Site A		Site A		Site A		Site B		Site B		Site B		Site B	
Household Quick Facts	25 mile ring		50 mile ring		100 mile ring		200 mile ring		0 min - 30 min		0 min - 60 min		0 min - 120 min		0 min - 240 min	
<b>Households</b>																
2014 Projection	374,626		1,237,197		1,904,545		3,211,406		305,423		1,087,679		1,814,665		3,165,429	
2009 Estimate	349,081		1,167,166		1,789,326		3,012,350		283,975		1,025,342		1,705,092		2,969,213	
2000 Census	305,771		1,050,167		1,595,688		2,679,673		247,463		921,667		1,521,073		2,641,720	
1990 Census	239,050		876,209		1,313,910		2,198,457		193,409		774,597		1,254,349		2,166,336	
Growth 2009-2014	7.32%		6.00%		6.44%		6.61%		7.55%		6.08%		6.43%		6.61%	
Growth 2000-2009	14.16%		11.14%		12.14%		12.41%		14.75%		11.25%		12.10%		12.40%	
Growth 1990-2000	27.91%		19.85%		21.45%		21.89%		27.95%		18.99%		21.26%		21.94%	
<b>2009 Estimated Households by Household Income</b>	<b>349,081</b>		<b>1,167,166</b>		<b>1,789,326</b>		<b>3,012,350</b>		<b>283,975</b>		<b>1,025,342</b>		<b>1,705,092</b>		<b>2,969,213</b>	
Less than \$15,000	23,441	6.72%	98,431	8.43%	156,306	8.74%	287,935	9.56%	19,590	6.90%	87,037	8.49%	145,942	8.56%	285,019	9.60%
\$15,000 to \$24,999	23,117	6.62%	87,433	7.49%	142,099	7.94%	264,751	8.79%	19,177	6.75%	75,539	7.37%	132,454	7.77%	261,544	8.81%
\$25,000 to \$34,999	29,241	8.38%	102,984	8.82%	165,939	9.27%	298,092	9.90%	24,114	8.49%	89,896	8.77%	155,940	9.15%	296,030	9.97%
\$35,000 to \$49,999	48,662	13.94%	163,261	13.99%	258,597	14.45%	455,032	15.11%	40,497	14.26%	142,389	13.89%	244,195	14.32%	449,650	15.14%
\$50,000 to \$74,999	75,675	21.68%	236,801	20.29%	373,274	20.86%	632,633	21.00%	62,427	21.98%	206,193	20.11%	355,453	20.85%	621,666	20.94%
\$75,000 to \$99,999	58,178	16.67%	171,430	14.69%	263,504	14.73%	423,225	14.05%	47,683	16.79%	149,953	14.62%	253,599	14.87%	415,506	13.99%
\$100,000 to \$149,999	61,227	17.54%	187,476	16.06%	271,549	15.18%	418,874	13.91%	49,141	17.30%	166,732	16.26%	263,715	15.47%	411,601	13.86%
\$150,000 to \$249,999	22,774	6.52%	84,493	7.24%	113,404	6.34%	166,913	5.54%	16,907	5.95%	75,726	7.39%	110,588	6.49%	164,297	5.53%
\$250,000 to \$499,999	5,006	1.43%	23,790	2.04%	30,919	1.73%	45,425	1.51%	3,365	1.18%	21,619	2.11%	29,915	1.75%	44,718	1.51%
\$500,000 or more	1,760	0.50%	11,067	0.95%	13,735	0.77%	19,470	0.65%	1,074	0.38%	10,258	1.00%	13,291	0.78%	19,182	0.65%
<b>2009 Estimated Average Household Income</b>	<b>\$79,982</b>		<b>\$82,130</b>		<b>\$77,980</b>		<b>\$73,650</b>		<b>\$77,468</b>		<b>\$82,966</b>		<b>\$78,760</b>		<b>\$73,535</b>	
<b>2009 Estimated Median Household Income</b>	<b>\$66,544</b>		<b>\$63,880</b>		<b>\$61,501</b>		<b>\$57,918</b>		<b>\$65,462</b>		<b>\$64,284</b>		<b>\$62,239</b>		<b>\$57,736</b>	
<b>2009 Estimated Per Capita Income</b>	<b>\$30,483</b>		<b>\$33,464</b>		<b>\$31,073</b>		<b>\$28,828</b>		<b>\$29,561</b>		<b>\$33,921</b>		<b>\$31,350</b>		<b>\$28,796</b>	

# POPULATION DENSITY BY ZIP CODE

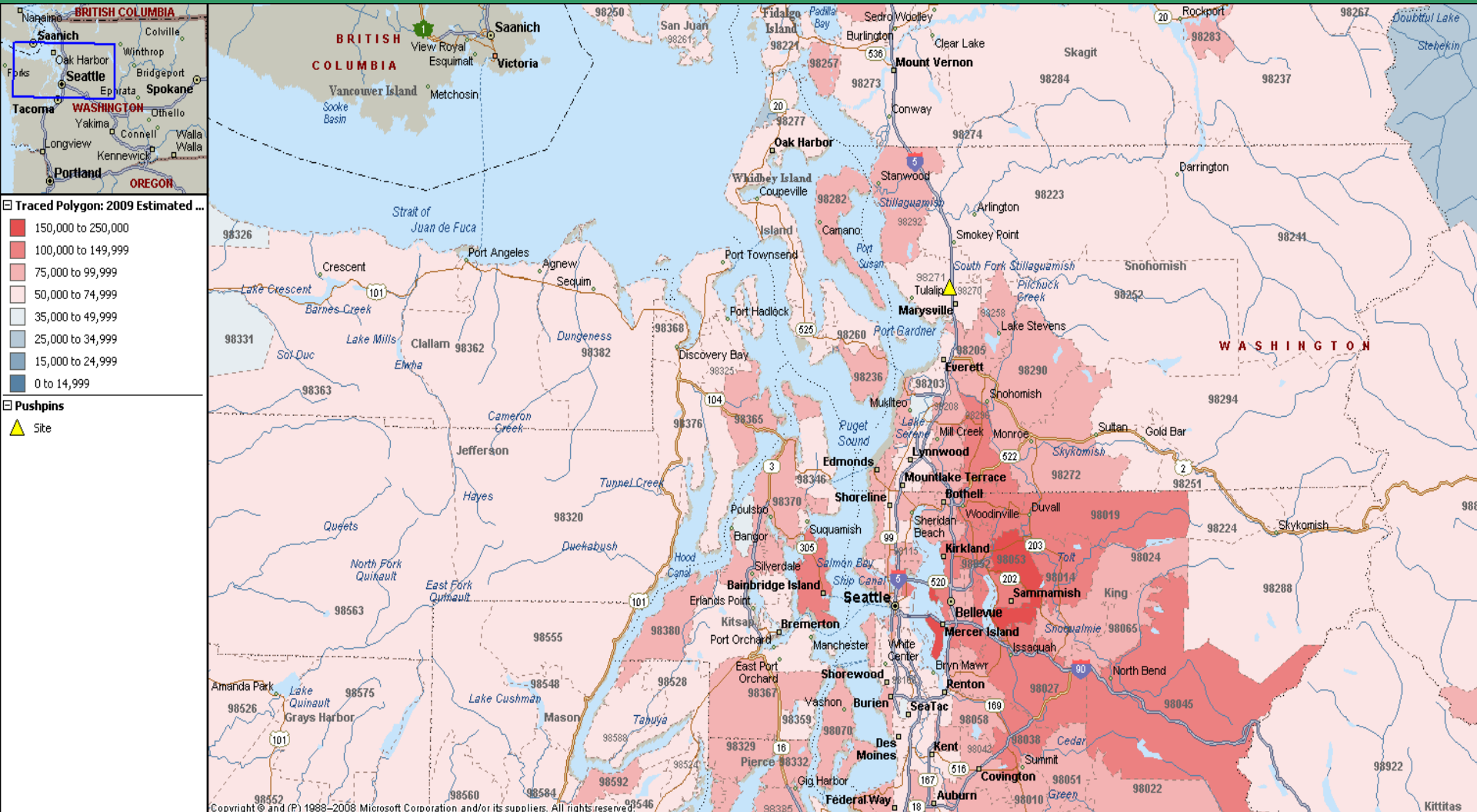


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market & feasibility studies ∴ business plans ∴ economic impact

**Klas Robinson QED**  
HOSPITALITY CONSULTING

# AVG. HOUSHOLD INCOME BY ZIP CODE



# Trends in Demographics - Age



*The power to make it better.*

Age 50 +

## Facility Needs:

- ❖ Larger Signage for Visibility
- ❖ Dietary Restrictions/Specialized Menus
- ❖ Stairs vs. Ramps & Escalators
- ❖ Hotel Room Facilities & Amenities
- ❖ Targeted Entertainment
- ❖ Distance From Parking
- ❖ Senior Discounts
- ❖ ADA requirements plus (parking, hotel)

# Trends in Demographics – Race/Ethnicity



Se Habla Español

## Facility Needs:

- ❖ Bi-Lingual Signage
- ❖ Bi-Lingual Advertising
  - Web Page
  - TV & Radio
  - Brochures
- ❖ Specialized Menus
- ❖ Targeted Entertainment & Events\*
- ❖ Bi-Lingual Customer Service Reps

*\* More than 20 different Spanish speaking countries!*



# PSYCHO- GRAPHICS

**Lifestyle clusters** combine basic demographic data with media measurements, consumer preference surveys, consumer expenditure patterns and other information to create a more comprehensive picture of the habits and preferences of the residents in the area under analysis.

The result is not only more detailed predictive information, but a descriptive image of the types of individuals in the market that provides nuance and color to aid in interpreting and extrapolating the hard data.





### 54 Multi-Culti Mosaic

Lower-Mid, Middle Age Family Mix

An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of younger Hispanic, Asian, and African-American singles and families. With nearly a quarter of the residents foreign born, this segment is a mecca for first-generation Americans who are striving to improve their lower-middle-class status.

Social Group: Midtown Mix  
Lifestage Group: Mainstream Families

2008 Statistics:  
US Households: 1,905,706 (1.66%)  
Median HH Income: \$35,222

#### Lifestyle Traits

Shop at Marshalls  
Buy Spanish/Latin music  
Read Jet  
Watch boxing  
Nissan Versa

Demographics Traits:  
Urbanicity: Urban  
Income: Lower-Mid  
Income Producing Assets: Below Avg.  
Age Ranges: 35-54  
Presence of Kids: Family Mix  
Homeownership: Homeowners  
Employment Levels: WC, Service, Mix  
Education Levels: Some College  
Ethnic Diversity: White, Black, Asian, Hispanic



### 66 Low-Rise Living

Low Income, Middle Age Mostly w/ Kids

The most economically challenged urban segment, Low-Rise Living is known as a transient world for middle age, ethnically diverse singles and single parents. Home values are low--about half the national average--and even then less than a quarter of residents can afford to own real estate. Typically, the commercial base of Mom-and-Pop stores is struggling and in need of a renaissance.

Social Group: Urban Cores  
Lifestage Group: Sustaining Families

2008 Statistics:  
US Households: 1,610,086 (1.40%)  
Median HH Income: \$24,331

#### Lifestyle Traits

Shop at Rite-Aid  
Domestic travel by bus  
Read Ebony  
Watch BET  
Drive van

Demographics Traits:  
Urbanicity: Urban  
Income: Low Income  
Income Producing Assets: Low  
Age Ranges: <55  
Presence of Kids: Mostly w/ Kids  
Homeownership: Renters  
Employment Levels: WC, Service, Mix  
Education Levels: Some High School  
Ethnic Diversity: White, Black, Asian, Hispanic



### 09 Big Fish, Small Pond

Upscale, Older w/o Kids

Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, including belonging to country clubs, maintaining large investment portfolios, and spending freely on computer technology.

Social Group: Landed Gentry  
Lifestage Group: Affluent Empty Nests

2008 Statistics:  
US Households: 2,650,000 (2.31%)  
Median HH Income: \$85,487

#### Lifestyle Traits

Order from L.L. Bean  
Belong to a country club  
Read Atlantic Monthly  
Watch college basketball  
Jaguar XK

Demographics Traits:  
Urbanicity: Town/Rural  
Income: Upscale  
Income Producing Assets: Elite  
Age Ranges: 45-64  
Presence of Kids: HH w/o Kids  
Homeownership: Homeowners  
Employment Levels: Management  
Education Levels: Graduate Plus  
Ethnic Diversity: White

# TRANSPORTATION MAP



	Pushpins
	Site
	Populated Places
	Boundaries
	Transportation
	Limited Access Highway
	Main Highway
	Other Highway
	Tunnel
	Toll Road
	Route Highlight
	Road Construction Route Highlight
	Road Closure Route Highlight
	Interstate Shield
	U.S. Highway Shield
	State Highway Shield
	County Highway Shield
	Trans-Canada Highway Shield
	Other Canadian Highway Shield
	Mexican Federal Highway Shield
	Ferry
	Parks and Reserves
	Miscellaneous



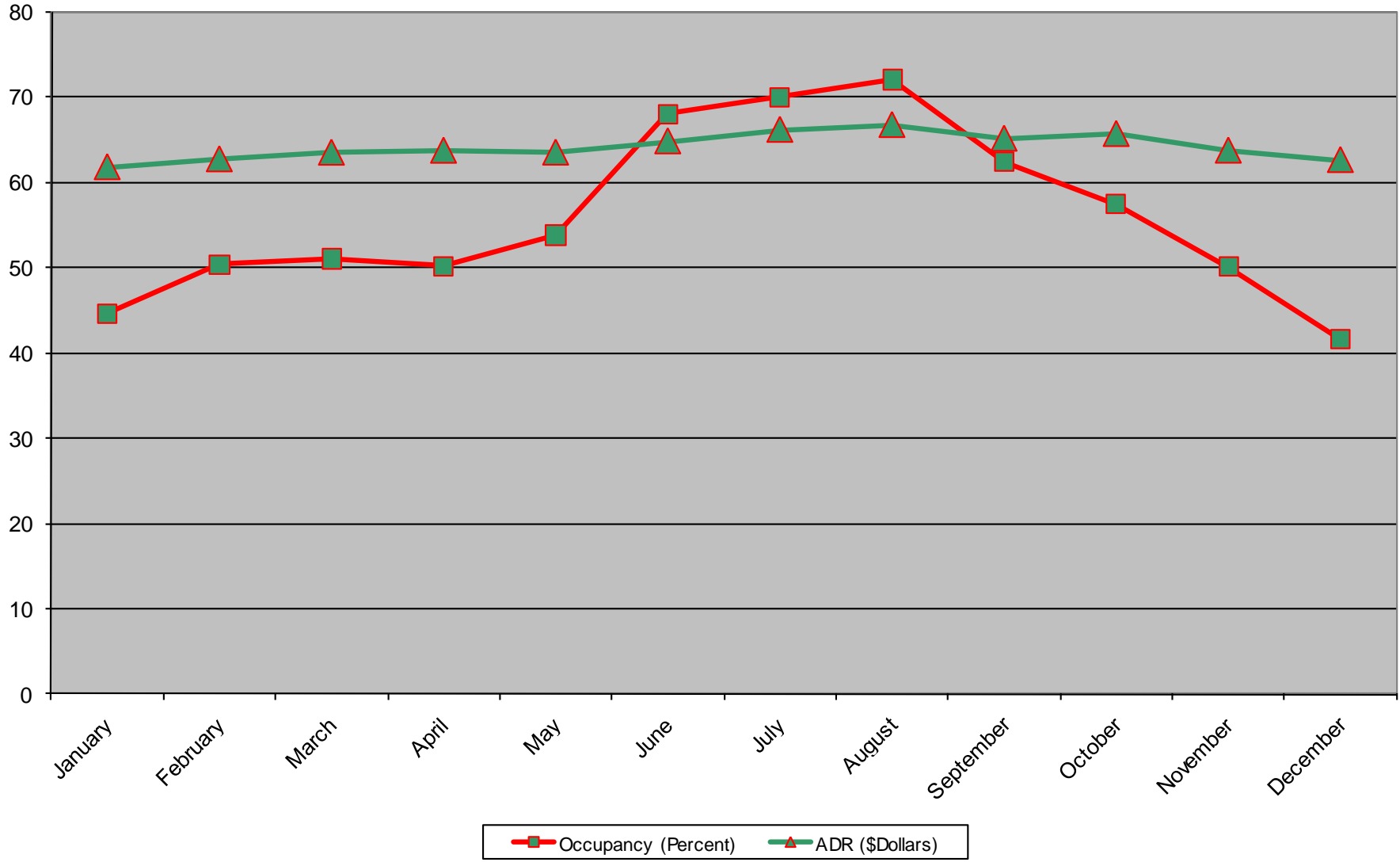
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market & feasibility studies ∴ business plans ∴ economic impact

# AREA TRAFFIC COUNTS

<u>Road/Location</u>	<u>Average Daily</u>	<u>Annual</u>
I-5 at U.S. Highway 12 (exit to Lucky Eagle Casino)	48,000	17,520,000
I-5 at State Route 510 (exit to Red Wind Casino)	103,000	37,595,000
I-5 at State Route 99 (exit to Emerald Queen Casino)	187,000	68,255,000
I-5 at State Route 18 (exit to Muckleshoot Casino)	180,000	65,700,000
<b><i>I-5 at 88<sup>th</sup> Street NE (near south Quil Ceda entrance)</i></b>	<b>97,000</b>	<b>35,405,000</b>
<b><i>I-5 between 88<sup>th</sup> and 116<sup>th</sup> Street NE</i></b>	<b>106,000</b>	<b>38,690,000</b>
<b><i>I-5 north of 116<sup>th</sup> Street NE (near north Quil Ceda entrance)</i></b>	<b>91,000</b>	<b>33,215,000</b>
I-5 at State Route 20 (exit to Swinomish Casino)	45,000	16,425,000
I-5 at Bow Hill Road (Skagit Valley Casino)	44,000	16,060,000
I-5 at Exit 260 (exit to Silver Reef Casino)	40,000	14,600,000

# Snohomish County Monthly Hotel Performance



**Washington State  
Travel Impacts, 2004-2009**

	2004	2005	2006	2007	2008	2009
<b>Total Direct Travel Spending (\$Million)</b>						
Destination Spending	10,151	11,013	12,007	12,885	13,387	12,087
Other Travel*	1,504	1,689	1,863	1,973	1,993	2,049
<b>Total Direct Spending</b>	<b>11,654</b>	<b>12,702</b>	<b>13,869</b>	<b>14,858</b>	<b>15,380</b>	<b>14,135</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>						
Hotel, Motel	5,001	5,436	6,032	6,549	6,720	6,019
Campground	488	532	563	619	634	588
Private Home	2,463	2,670	2,859	3,012	3,194	2,931
Vacation Home	174	183	193	203	212	201
Day Travel	2,025	2,193	2,359	2,502	2,627	2,349
Destination Spending	10,151	11,013	12,007	12,885	13,387	12,087
<b>Visitor Spending by Commodity Purchased (\$Million)</b>						
Accommodations	1,685	1,844	2,102	2,347	2,396	2,094
Food Service	2,525	2,695	2,874	3,067	3,163	3,136
Food Stores	515	534	555	598	633	614
Local Tran. & Gas	2,078	2,409	2,752	3,007	3,332	2,444
Arts, Ent. & Rec.	1,303	1,344	1,405	1,457	1,459	1,404
Retail Sales	1,476	1,523	1,582	1,618	1,609	1,567
Visitor Air Tran.	569	664	737	791	796	827
Destination Spending	10,151	11,013	12,007	12,885	13,387	12,087
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>						
Accom. & Food Serv.	1,557	1,678	1,806	1,948	2,003	1,937
Arts, Ent. & Rec.	687	729	762	790	791	744
Retail**	330	339	351	363	363	356
Ground Tran.	113	117	123	128	132	123
Visitor Air Tran.	267	260	254	262	248	261
Other Travel*	718	710	717	737	714	729
<b>Total Direct Earnings</b>	<b>3,672</b>	<b>3,834</b>	<b>4,013</b>	<b>4,229</b>	<b>4,251</b>	<b>4,151</b>
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>						
Accom. & Food Serv.	69.8	73.1	75.4	78.4	78.9	74.8
Arts, Ent. & Rec.	36.8	36.9	37.6	38.2	38.5	37.4
Retail**	14.7	14.8	14.9	14.9	14.6	14.2
Ground Tran.	4.8	4.7	4.8	4.6	4.7	4.4
Visitor Air Tran.	3.8	3.6	3.5	3.4	3.4	3.2
Other Travel*	10.8	10.5	10.4	10.4	10.6	9.9
<b>Total Direct Employment</b>	<b>140.7</b>	<b>143.7</b>	<b>146.6</b>	<b>149.9</b>	<b>150.7</b>	<b>144.0</b>
<b>Government Revenue Generated by Travel Spending (\$Million)</b>						
Local Tax Receipts	235	254	282	310	314	285
State Tax Receipts	575	601	647	687	698	660
Federal Tax Receipts	680	720	759	796	797	792
<b>Total Direct Gov't Revenue</b>	<b>1,490</b>	<b>1,574</b>	<b>1,688</b>	<b>1,792</b>	<b>1,809</b>	<b>1,736</b>

Details may not add to totals due to rounding.

\*Other Travel includes resident air travel and travel agencies. \*\*Retail includes gasoline.

**Snohomish County  
Travel Impacts, 1991-2009**

	1991	2000	2002	2004	2006	2008	2009
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	336.8	570.6	575.4	672.9	823.4	911.6	786.3
Other Travel*	14.2	13.5	13.8	8.0	11.6	12.4	11.3
<b>Total Direct Spending</b>	<b>351.0</b>	<b>584.2</b>	<b>589.2</b>	<b>681.0</b>	<b>835.1</b>	<b>923.9</b>	<b>797.6</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel	90.1	196.2	189.1	228.0	303.3	325.8	274.0
Campground	12.2	15.5	14.4	16.0	18.3	20.6	18.4
Private Home	130.4	203.1	213.8	245.9	283.9	323.3	283.8
Vacation Home	8.3	6.0	5.9	6.6	7.5	8.3	7.8
Day Travel	95.8	149.9	152.3	176.3	210.5	233.6	202.3
Destination Spending	336.8	570.6	575.4	672.9	823.4	911.6	786.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	31.4	66.0	59.9	69.1	96.5	108.5	90.3
Food Service	86.9	149.3	161.0	181.4	213.6	229.6	221.9
Food Stores	19.3	32.0	34.5	38.8	42.9	48.1	45.3
Local Tran. & Gas	75.0	127.1	117.7	167.9	231.9	284.9	201.4
Arts, Ent. & Rec.	52.8	87.7	91.6	100.3	112.1	113.8	106.5
Retail Sales	71.4	108.6	110.8	115.5	126.3	126.6	120.9
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Destination Spending	336.8	570.6	575.4	672.9	823.4	911.6	786.3
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	39.5	74.1	78.2	87.1	106.1	114.9	108.3
Arts, Ent. & Rec.	20.5	37.1	36.8	40.1	46.2	46.9	43.0
Retail**	14.1	22.3	23.2	25.6	27.8	28.3	27.2
Ground Tran.	2.2	4.6	5.2	5.7	6.4	6.9	6.7
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	7.1	6.8	6.9	4.0	5.8	6.2	5.6
<b>Total Direct Earnings</b>	<b>83.4</b>	<b>144.9</b>	<b>150.2</b>	<b>162.5</b>	<b>192.3</b>	<b>203.2</b>	<b>190.8</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,280	4,260	4,210	4,440	4,960	5,150	4,720
Arts, Ent. & Rec.	1,920	2,310	2,420	2,430	2,690	2,870	2,760
Retail**	920	1,140	1,100	1,170	1,210	1,190	1,120
Ground Tran.	140	210	240	260	260	250	240
Visitor Air Tran.	0	0	0	0	0	0	0
Other Travel*	280	310	240	130	140	140	130
<b>Total Direct Employment</b>	<b>6,540</b>	<b>8,230</b>	<b>8,210</b>	<b>8,430</b>	<b>9,260</b>	<b>9,610</b>	<b>8,980</b>
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	4.2	8.5	9.1	11.2	13.7	14.7	13.4
State Tax Receipts	23.6	35.7	37.2	42.1	48.6	51.6	47.9
<b>Total Direct Gov't Revenue</b>	<b>27.8</b>	<b>44.2</b>	<b>46.3</b>	<b>53.3</b>	<b>62.4</b>	<b>66.3</b>	<b>61.3</b>

Details may not add to totals due to rounding. Insufficient data denoted by (#).

\*Other Travel includes resident air travel and travel agencies. \*\*Retail includes gasoline.

**Source: Washington State Department of Commerce – Office of Tourism**

# Canadian Visitor Profile

## **Canadian Arrivals to Washington State By Person Visits & Nights (One or More Nights - 2005)**

<u>Category</u>	<u>Amount</u>
Overnight Visits	1,612,000
Person Nights	4,588,000
Average Nights Per Overnight Visit	2.8

## **Canadian Arrivals to Washington State By Expenditures (One or More Nights - 2005)**

<u>Category</u>	<u>Amount</u>
Total Spending > 1 Night	\$255,970,000
Total Spending Per Capita > 1 Night	\$159
Daily Spending Per Capita > 1 Night	\$56

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries and Stats Canada



## Canadian Visitor Profile

### Canadian Arrivals to Washington State By Mode of Transportation (One or More Nights - 2005)

<u>Category</u>	<u>Amount</u>	<u>Percent</u>
Auto	1,396,000	86.6%
Air	81,000	5.0%
Bus	25,000	1.6%
<u>Other</u>	<u>110,000</u>	<u>6.8%</u>
<b>Total</b>	<b>1,612,000</b>	<b>100.0%</b>

### Canadian Arrivals to Washington State By Type of Accommodations (One or More Nights - 2005)

<u>Category</u>	<u>Amount</u>	<u>Percent</u>
Camping	314,000	19.5%
Cottage/Cabin	205,000	12.7%
Hotel/Motel	517,000	32.1%
Friend/Relative	320,000	19.9%
Other/Combination	133,000	8.3%
<u>Not Stated</u>	<u>123,000</u>	<u>7.6%</u>
<b>Total</b>	<b>1,612,000</b>	<b>100.0%</b>

### Canadian Arrivals to Washington State By Purpose of Trip (One or More Nights - 2005)

<u>Category</u>	<u>Amount</u>	<u>Percent</u>
Business/Convention	117,000	7.3%
Visit Friend/Relative	366,000	22.7%
Vacation	949,000	58.9%
<u>Other</u>	<u>180,000</u>	<u>11.2%</u>
<b>Total</b>	<b>1,612,000</b>	<b>100.0%</b>

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries and Stats Canada

# COMPETITIVE ENVIRONMENT

## *INDUSTRY BACKGROUND*

- *History, Size, Growth Patterns*

## *MARKET COMPETITION*

- *Existing and Potential*
- *Description of Competitors*
- *Number of Competitors*
- *Age of Competitors*
- *Core Facilities & Amenities*
- *Ancillary Facilities & Amenities*
- *Quality of Facility and Surroundings*
- *Market Position*
- *Relative Strengths & Weaknesses*

# COMPETITIVE SUPPLY



Site
Card Room
Racetrack
Indian
Planned
Populated Places
Boundaries
Transportation
Parks and Reserves
Miscellaneous



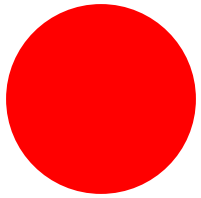
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**Klas Robinson QED**  
HOSPITALITY CONSULTING

# COMPETITION - LOCATION

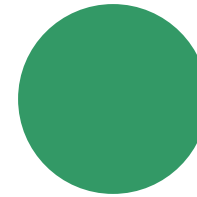
- Distance
- Proximity to population centers
- Relative position



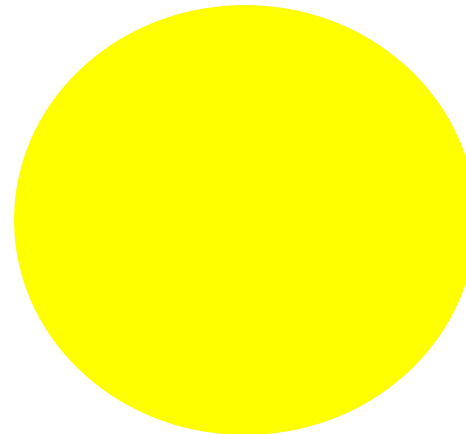
**Subject**

10 miles

**Competitor**



5 miles



**Population**



# FACILITY RECOMMENDATIONS

*CAN YOU AFFORD IT?*

*IS IT A GOOD BUSINESS DECISION?*

*WHAT IS THE PROPER MIX?*



# BALANCE/MIX

The **BALANCE** between development components is a critical success factor

The proper balance varies, depending upon the characteristics of the **MARKET** and the **COMPETITION**

# UTILIZATION ESTIMATES

***Frequency (Quantity) X Fee (Price)***

***Casino: Daily Win Per Position X Positions***

***or Daily Expenditure Per Patron X Patrons***

***Hotel: Occupancy (Occupied/Available Rooms) X ADR***

***RV Park: Occupancy (Occupied/Available Pads) X ADR***

***Gas Station: Gallons Sold X Cost Per Gallon***

***Bar / Restaurant: Covers X Cost Per Cover***

***Golf Course: Rounds X Cost Per Round***

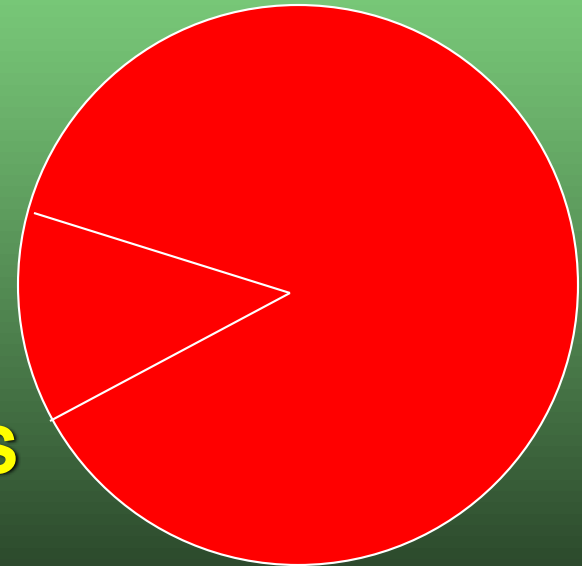
# EVALUATION METHODS

- Gravity model
- Comparative model
- Supply / Demand model

Fair-Share Analysis

Market Penetration

Utilization Estimates



Market/Facility (No. of Properties)	Gaming		Population		Gaming		Population		Avg. Daily Gaming Win		
	Positions Within		Per Position		Positions Within		Per Position		Per Slot	Per Table	Per Position
	50 - Mile	200 - Mile	50 - Mile	200 - Mile	1 - Hour	4 - Hours	1 - Hour	4 - Hours			
Chicago Area IL/IN (8)	22,900	55,700	408	454	19,200	86,100	505	394	\$341	\$2,162	\$335
Detroit, MI (3)	11,400	32,800	424	671	11,400	58,200	512	517	NA	NA	\$317
Louisville Area - IN (1)	4,500	18,900	338	903	2,800	34,300	492	586	\$337	\$1,416	\$300
Lake Charles, LA (2)	9,700	39,700	51	298	9,700	9,700	57	1,156	NA	NA	\$288
Shreveport/Bossier City, LA (5)	8,000	35,700	72	330	8,000	43,100	76	315	NA	NA	\$285
Atlantic City, NJ (11)	46,800	103,800	36	432	46,800	106,300	63	427	\$245	\$2,290	\$265
New Orleans, LA (5)	7,600	50,400	197	126	10,300	58,500	155	116	NA	NA	\$263
Metropolis, IL (1)	1,400	38,200	377	342	1,400	39,700	315	365	\$258	\$1,634	\$254
East Peoria, IL (1)	1,300	58,800	591	402	1,300	65,500	645	414	\$259	\$1,324	\$249
Altoona, IA (1)	5,300	40,700	153	199	5,300	58,300	164	291	\$253	\$1,223	\$243
Cincinatti Area - IN (3)	7,700	19,700	296	911	7,700	22,700	266	990	\$261	\$1,171	\$242
Baton Rouge, LA (2)	4,200	55,400	271	123	4,100	60,000	301	138	NA	NA	\$239
Council Bluffs, IA (3)	5,400	28,800	193	232	5,400	36,900	222	218	\$245	\$1,026	\$229
Evansville, IN (1)	1,400	32,900	495	504	1,400	34,200	496	542	\$259	\$931	\$226
Michigan City, IN (1)	17,400	52,200	318	578	17,400	70,200	234	516	\$238	\$1,013	\$222
Las Vegas Strip, NV (41)	165,900	203,400	11	31	165,800	208,400	11	102	\$163	\$2,338	\$215
Saint Louis Area - MO/IL (6)	13,100	22,400	213	427	13,100	63,900	218	384	\$230	\$993	\$215
Booneville, MO (1)	1,100	44,200	432	229	1,100	47,000	415	247	\$216	\$832	\$203
Kansas City, MO (4)	11,200	34,900	195	244	11,200	58,500	218	216	\$211	\$936	\$198
Northwood, IA (1)	1,100	43,400	245	216	1,100	53,100	308	215	\$220	\$529	\$191
Sioux City, IA (1)	1,800	20,800	148	210	1,800	41,600	154	168	\$196	\$790	\$181
Waterloo, IA (1)	3,200	36,600	160	285	3,200	55,700	166	350	\$200	\$546	\$176
MS - Gulf Coast Counties (11)	18,700	48,900	31	134	18,700	63,500	42	124	NA	NA	\$171
Clinton, IA (1)	4,400	51,700	156	383	4,400	66,400	137	336	\$179	\$522	\$164
St. Joseph, MO (1)	13,400	31,500	55	249	12,500	43,000	131	232	\$173	\$668	\$163
Dubuque, IA (2)	2,900	54,300	115	367	2,200	66,200	150	330	\$169	\$671	\$160
Riverside, IA (1)	4,000	39,900	171	390	5,300	72,200	143	301	\$172	\$519	\$151
Quad Cities IA/IL (3)	4,400	60,400	153	338	4,400	69,600	178	354	\$164	\$432	\$147
French Lick, IN (1)	4,500	24,700	177	700	1,700	32,100	212	632	\$157	\$714	\$146
MS - Mississippi River Counties (19)	19,100	36,200	67	207	19,100	34,700	66	268	NA	NA	\$143
South Lake Tahoe, NV (4)	38,600	76,500	17	193	15,900	73,400	16	190	\$142	\$933	\$139
LaGrange, MO (1)	1,600	43,000	150	263	1,600	47,600	120	270	\$140	\$499	\$131
Laughlin, NV (10)	13,500	230,800	13	48	13,300	224,300	11	101	\$139	\$570	\$129
Fort Madison, IA (1)	1,600	44,400	186	322	1,600	59,500	142	322	\$140	\$500	\$127
Osceola, IA (1)	3,300	41,900	185	198	3,300	47,500	186	246	\$128	\$496	\$120
Emmetsburg, IA (1)	600	31,200	306	292	600	39,400	234	234	\$137	\$352	\$117
Marquette, IA (1)	2,900	51,100	107	407	800	52,100	295	393	\$126	\$280	\$114
Caruthersville, MO (1)	800	35,800	513	330	800	39,000	406	324	\$122	\$505	\$112
Blackhawk/Central City (24)	13,900	19,800	211	252	13,900	19,800	196	255	\$119	\$340	\$111
Las Vegas Downtown, NV (20)	165,900	203,400	11	28	165,800	208,400	11	98	\$95	\$785	\$99
Reno-Sparks, NV (29)	39,200	74,300	16	181	40,400	70,400	15	184	\$97	\$738	\$98
Mesquite, NV (7)	3,700	185,900	42	15	14,000	198,000	23	25	\$99	\$520	\$95
Wendover, NV (6)	5,300	11,800	1	240	5,500	10,800	1	254	\$98	\$582	\$95
Boulder Strip, NV (35)	165,900	203,400	11	29	165,800	208,400	11	99	\$91	\$711	\$93
N. Las Vegas (12)	165,900	203,400	11	29	165,800	208,400	11	98	\$76	\$431	\$74
Cripple Creek, CO (12)	5,900	22,300	150	227	5,900	19,800	94	245	\$71	\$123	\$65
Deadwood, SD (32)	4,800	6,800	34	89	4,800	6,600	32	92	\$67	\$225	\$62

PRO FORMA

	Year One	Percent	Year Two	Percent	Year Three	Percent	Year Four	Percent	Year Five	Percent
Revenue										
Category A	100	74.1%	103	74.1%	106	74.1%	109	74.1%	113	74.1%
Category B	25	18.5%	26	18.5%	27	18.5%	27	18.5%	28	18.5%
Category C	10	7.4%	10	7.4%	11	7.4%	11	7.4%	11	7.4%
Total	135	100.0%	139	100.0%	143	100.0%	148	100.0%	152	100.0%
Departmental Expenses										
Category A	50	50.0%	52	50.0%	53	50.0%	55	50.0%	56	50.0%
Category B	15	60.0%	15	60.0%	16	60.0%	16	60.0%	17	60.0%
Category C	7	70.0%	7	70.0%	7	70.0%	8	70.0%	8	70.0%
Total	72	53.3%	74	53.3%	76	53.3%	79	53.3%	81	53.3%
Departmental Profit	63	46.7%	65	46.7%	67	46.7%	69	46.7%	71	46.7%
Undistributed Expenses										
A & G	15	11.1%	15	11.1%	16	11.1%	16	11.1%	17	11.1%
Marketing	5	3.7%	5	3.7%	5	3.7%	5	3.7%	6	3.7%
Utilities	3	2.2%	3	2.2%	3	2.2%	3	2.2%	3	2.2%
P, O & M	2	1.5%	2	1.5%	2	1.5%	2	1.5%	2	1.5%
Other	1	0.7%	1	0.7%	1	0.7%	1	0.7%	1	0.7%
Total	26	19.3%	27	19.3%	28	19.3%	28	19.3%	29	19.3%
Cash Flow from Operations Before Debt Service & Management Fees	37	27.4%	38	27.4%	39	27.4%	40	27.4%	42	27.4%
Management/Franchise Fees	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Cash Flow from Operations Before Debt Service	37	27.4%	38	27.4%	39	27.4%	40	27.4%	42	27.4%
Debt Service	20		20		20		20		20	
Debt Coverage Ratio	1.9 X		1.9 X		2.0 X		2.0 X		2.1 X	

**Return on Investment (ROI) is another measure of project viability = Annual Cash Flow/ Total Project Cost**

# PROJECT COST ESTIMATES

**Land Cost** *(if not already owned or in trust)*

**Professional Fees** *(Legal, Architectural, Consultants)*

**Construction Cost** *(Infrastructure, Building, FF&E)*

**Financing Cost** *(\$\$\$ Down, Collateral, Interest, fees)*

**Other Costs** *(Pre-Opening, Contingency, Management)*



# PROXIMITY TO TRIBAL GAMING



Quod erat demonstrandum “which was to be proved”

# COST-BENEFIT OF CASINO ANCILLARY FACILITIES

<u>Casino Component</u>	<u>Construction Cost</u>	<u>Utilization</u>	<u>Incremental Gaming</u>	<u>Gaming ROI</u>
Hotel	\$80,000 - \$350,000 Per Room	65% to 85 % Occupancy \$50 - \$150 Rate Per Room	\$150 - \$500 Per Occupied Roomnight	30% to 40% ROI
18-Hole Golf Course	\$50,000 - \$1,000,000 Per Hole	20,000 - 35,000 Rounds \$25 - \$125 Rate Per Round	\$10 - \$30 Per Round	5% to 15% ROI
Spa	\$250.00 - \$500.00 Per Square Foot	1.0 to 5.0 percent of Hotel Guests \$50.00 to \$200.00 Rate Per Visit	\$15 - \$50 Per Occupied Roomnight	15% to 25% ROI
Convention Center	\$200.00 - \$450.00 Per Square Foot	25% - 40% Occupancy \$20 to \$45 F & B Sales Per Seat	\$10 - \$25 Per Guest	30% to 40% ROI
Entertainment/Events Complex	\$300.00 - \$600.00 Per Square Foot	250 - 2,000 guests Per Event \$20 - \$75 Per Ticket	\$5 - \$15 Per Guest	5% to 15% ROI
Cinema	\$5,000 - \$7,500 Per Seat	150 - 250 Guests Per Seat Per Year \$6 - \$12 Per Ticket	3.0% to 5.0% of Adult Movie-Goers at the avg. locals gaming expenditure per day	40% to 50% ROI
RV Park	\$15,000 - \$35,000 Per Pad/Site	35% - 70% Occupancy \$12 - \$50 Rate Per Site	\$50 - \$150 Per Occupied Pad/Site	60% to 70% ROI
Bowling Alley	\$100,000 - \$125,000 Per Lane	7,500 - 11,500 Games Per Lane Per Year \$2.00 to \$4.00 Per Game	5.0% to 20.0% of Adult Bowlers at the avg. locals gaming expenditure per day	15% to 25% ROI
Retail (Outlet Mall)	\$90.00 - \$250.00 Per Square Foot	70% - 95% Occupancy \$200 - \$300 Sales Per Square Foot	5.0% to 10.0% of Adult Shoppers at the avg. locals gaming expenditure per day	5% to 15% ROI
Child Care	\$150.00 - \$200.00 Per Square Foot	\$5.00 to \$9.00 Per Hour Per Child	\$500,000 to \$2.0 Million Annually	25% to 35% ROI
Parking Structure	\$10,000 - \$15,000 Per Space	0.5 to 5 Turns Per Day Per Space	\$10.00 to \$50.00 per Day per Space	65% to 75% ROI

**Other Related Sources of Demand: Gaming Patrons, Employees, Tribal Members**

PLAN/DESIGN  
YOUR BUSINESS  
FOR  
**YOUR** CUSTOMER!

# Customer Service

## Servicio De Cliente

### 顾客服务

# INFORMATION SOURCES

**National Association of RV Parks & Campgrounds**

<http://www.arvc.org/>

**National Association of Convenience Stores**

<http://www.cstorecentral.com>

**National Golf Foundation – Operating Statistics**

<http://www.ngf.org/>

**International Spa Association (ISPA)**

<http://www.experienceispa.com>

**National Restaurant Association**

<http://www.restaurant.org/>

**Food Marketing Institute**

<http://www.fmi.org>

**International Association of Amusement Parks and Attractions (IAAPA)**

<http://www.iaapa.org>

**AMF Bowling Worldwide**

<http://www.amf.com>

**International Association for the Leisure and Entertainment Industry (IALEI)**

<http://www.ialei.org>

**International Marina Institute**

<http://www.imimarina.com>

**Smith Travel Research – Host Lodging Study**

<http://www.str-online.com/>





Choctaw Electronics Enterprise



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Klas

Robinson QED  
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market & feasibility studies ∴ business plans ∴ economic impact

# questions & answers

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