ANNOTATED MINUTES
SPECIAL
RECOMMENDING COMMITTEE MEETING
REED WHIPPLE AUDITORIUM
821 LAS VEGAS BOULEVARD NORTH
DECEMBER 22, 1994

ATTENDANCE:	Councilman Hawkins
EXCUSED:	Mayor Jones Councilman Adamsen Councilman Higginson Councilman Brass
CALL TO ORDER:	The meeting was called to order by Councilman Hawkins at 6:12 p.m.
ANNOUNCEMENT MADE:	Meeting noticed and posted at the following locations:

Downtown Transportation Center, City Clerk's Board
Senior Citizen Center, 450 E. Bonanza Road
Bridger Building, 225 E. Bridger Ave.
Court Clerk's Office Bulletin Board, City Hall Plaza
City Hall Plaza, Special Outside Posting Bulletin Board

City Clerk Kathleen Tighe noted that the meeting had been noticed and posted in accordance with the Open Meeting Law. It did not appear necessary for a quorum of the City Council to be present. This meeting was strictly for public input. No action will be taken. Action will be taken at the regular City Council meeting.

Councilman Hawkins opened the Public Hearing.

1. **BILL NO. 94-94** -- Amends Chapter 48 of Title 10 of the Las Vegas Municipal Code to Delete, Amend and Add Sections Relating to Graffiti.
   Committee: Full Council

2. **BILL NO. 94-95** -- Repeals Chapter 44 of Title 10 of the Las Vegas Municipal Code and Establishes a New Misdemeanor Offense of Unlawful Solicitations and Establishes Time, Place, and Manner Restrictions
   Committee: Full Council

3. **BILL NO. 94-96** -- Repeals Chapter 47 of Title 10 of the Las Vegas Municipal Code and Establishes a New Misdemeanor Offense for Pedestrian or Vehicular Interference.
   Committee: Full Council

   City Attorney Brad Jerbic presented the Affidavit of Todd Marshall to the City Clerk to be made part of the record (Affidavit attached hereto).

   Juanita Wilson, owner of the EconoLodge Downtown on Casino Center, was the spokesperson for the owners of nine other small motels in the downtown area who could not attend the meeting, but share the same concerns that she does. Ms. Wilson applauded the efforts of the City Council on the proposed bills. More specifically she supported the restrictions on aggressive solicitation in Bill No. 94-95, as well as the restriction on solicitation within twenty feet of the entrance or exit of a building. She stated aggressive solicitation is a significant problem within the

City. She has tried to police her own property, but often received complaints from her motel guests and employees that solicitation activity was being conducted in her parking lot, the sidewalks around the motel and the alley behind her motel. The solicitation activity is usually persistent, harassing and intimidating. Guests sometimes check into the motel and then check out a few minutes later after finding a panhandler sitting on their car refusing to leave or a panhandler blocking the guests' access to their cars or to their rooms. She has been forced to keep her property under constant supervision and surveillance.

Ms. Wilson also supported restricting all solicitation activity to at least twenty feet away from the entrances and exits of businesses because that activity near entrances or exits creates a physical obstruction, thus posing safety problems for customers. She has found customers are less likely to enter business establishments when faced with such physical obstructions. The most vulnerable customers, including the elderly, the physically challenged and people with young children, are targets of solicitation activity. Ms. Wilson thanked the Council for its efforts and offered her support for these Ordinances.

City Attorney Jerbic said at the meeting of December 19, he informed the Council he would bring a First Amendment to Bill No. 94-95 based on the additions put into the record. That First Amendment was available for distribution and will go before the Council on January 4, 1995. Changes were added to Line 25 on Page 4. As cited earlier in the Ordinance, the City of Las Vegas is permitted to rely on the findings of other cities as to the interests sought to be protected in the City of Las Vegas. He read into the record at the last meeting the findings of the City of Riverside and the City of Anaheim which are both included. Findings of the City of San Francisco and the City of New York have also been included regarding the effects of solicitation and, particularly, aggressive solicitation in recreation areas and shopping areas and solicitation within proximity to automatic teller machines (ending on Page 7). Mr. Jerbic noted he informed Council there would be some changes to the language which appear on Page 10 at Lines 18 and 20. Finally, Section 14.44.040 has been changed to read: "If property is owned or controlled by a private owner or operator, nothing in this Chapter shall be construed as applying to the conduct or activity of a person on said property with the permission of the owner or operator of the property." That was the correct amendment Mr. Jerbic intended to put into the record at the December 19th meeting.

Mr. Keith Townsend of Allright Parking addressed the issue of parking garages and parking lots, as well. In addition to the comments of Ms. Wilson, he said that solicitation when accompanied with pamphlets causes excessive trash in an area, thereby costing businesses additional expenses in cleaning up. Solicitation also levies an unfair liability risk on a business owner by requiring additional safety measures to be installed for the protection of everyone. Solicitation activity in parking garages is a vital situation to patrons of a parking garage because they are a very captive audience. They must park their vehicles and when they get out they are faced with a solicitation activity and are actually trapped between two vehicles. With the number of carjackings going on, this causes a natural fear to garage patrons. Solicitations in garages and parking lots create a high security risk.

Councilman Hawkins commented that the proposed Ordinances will help all businesses throughout the City. In discussions with members of the Convention and Visitors Authority and elected officials of Clark County, they wish to support this Ordinance and look forward to adoption of similar ordinances in their areas. Councilman Hawkins pointed out that the number one complaint for visitors to Las Vegas is being bothered or approached by people they do not know for various reasons.

Councilman Hawkins thanked members of the Fremont Street Experience and especially the small business people who have continued to fight and not give up for supporting this Ordinance and hopefully when it is passed, business in the downtown will increase.

Councilman Hawkins noted that the Council did vote to forward these Bills to the Full Council with a "Do Pass" recommendation at the January 4, 1995 City Council meeting.

(6:12- 6:23)

ADJOURNMENT: The meeting adjourned at 6:23 p.m.

/cmp
12-28-94

AFFIDAVIT OF TODD MARSHALL

STATE OF NEVADA)
) ss:
COUNTY OF CLARK)

I, **TODD MARSHALL**, being first duly sworn, do hereby depose and say as follows:

1. I am the President of Marshall-Rousso which operates apparel shops throughout the Las Vegas valley. My company also operates the Trader Bill's shop in the Fremont Street Experience at the corner of Fourth Street, in addition to similar stores on the Las Vegas "Strip." I have personal knowledge of the matters set forth herein and am competent to so testify.

2. I have reviewed the City of Las Vegas' proposed solicitation ordinance prohibiting solicitation with 20 feet of the entrance to a business establishment and within the Fremont Street Experience commercial/entertainment complex. My experience has shown that such measures will improve the viability of businesses in the affected area, because solicitation activities generally have a negative impact on the businesses near the area where the solicitation takes place. This occurs for a number of reasons, which have been related to me and my staff and in my own conversations with customers:

a. Potential customers avoid solicitors, regardless of their message, merely to avoid being hassled. This causes the potential customers to also avoid the businesses nearby.

b. Potential customers associate the solicitors with the nearby business; i.e., that the solicitor has the approval, endorsement or support of the nearby business. Thus, if the patron disapproves or disagrees with a solicitor and avoids patronizing the solicitor, the patron also avoids the nearby business.

c. The presence of solicitors creates a negative environment for patrons, who merely will walk past solicitors to avoid them, rather than enter a business where the patron has to confront solicitors going into the business and again coming out.

d. Because solicitation activities are often accompanied by the solicitor's other objectionable activities, such as littering, coercive solicitation, and harassment, patrons associate these things with any solicitor and avoid the solicitor and the businesses near the solicitor. The patron's "mission" is thereby transformed from recreation and enjoyment to avoidance of hassle and inconvenience.

e. Solicitors near a building entrance create a physical barrier to patrons, who may merely pass by a business rather than negotiate their way past this physical barrier.

3. It is difficult to assess and quantify the negative impact that solicitors have on a business, as lost sales and lost sales opportunities cannot really be measured accurately. However, our recent experience on the Las Vegas Strip shows that <u>when solicitors were removed from the front of our shop by court order</u> (they were blocking business entrances and blocking the sidewalk to the point of rendering it unsafe) <u>our sales increased by approximately 33%</u>. For the months prior to the court order, when the solicitors were present, our sales were flat and even showed

a decrease. This is stark and compelling evidence that the mere presence of solicitors suppresses the surrounding businesses.

4. In my opinion, in order to make the Fremont Street Experience the successful commercial and entertainment project it is designed and intended to be, it is absolutely essential that solicitation activities occur outside the project, rather than within the confines of the project. In my experience, the presence of solicitors within the project will perpetuate the very economic decline which the creation of the Fremont Street Experience was intended to reverse. With no solicitation in the project, the abutting businesses and the carts and kiosks within the project can thrive free of the suppressive effect solicitation imposes upon such businesses.

5. For the above reasons, I urge the Las Vegas City Council adopt the proposed solicitation ordinance in order to protect existing businesses and protect the Fremont Street Experience Project's chances of success.

TODD MARSHALL

SUBSCRIBED and SWORN to before me
this 19th of December, 1994.

Sharon Larsen
NOTARY PUBLIC

NOTARY PUBLIC
STATE OF NEVADA
County of Clark
Sharon Larsen
My Appointment Expires Dec. 27, 1997

FH

BARRY SHIER
President

GOLDEN NUGGET

December 16, 1994

HAND-DELIVERED

Mr. Frank Hawkins, Jr.
City Councilman
City Hall, 10th Floor
400 East Stewart
Las Vegas, Nevada 89101

Dear Mr. Hawkins:

On December 19 and December 22, 1994 you will hear public comment on three (3) ordinances, Bill No. 94-93, Bill No. 94-95, Bill No. 94-96, these ordinances are instrumental to the success of the Fremont Street Experience. While I will not be able to attend the public hearings in person because of a prior commitment I wanted to make an effort to explain why the Golden Nugget feels that the passage of these ordinances are critical.

When Jon Jerde first sat down with the members of the Fremont Street Experience and described what he envisioned, it was clear to all of the members that we would have to have the ability to manage the Pedestrian Mall free of offensive activities in order to make it a first class entertainment attraction. As you are aware, downtowns ability to attract tourists has declined steadily and rapidly over the last few years. If the Fremont Street Experience is not able to change the negative perception that currently exists in regard to downtown it is inevitable that economic collapse will occur. Restoring economic growth and vitality to downtown has been a mandate the Golden Nugget has been striving to achieve through its participation as a member of the Fremont Street Experience Limited Liability Company ("FSELLC").

The ability of the FSELLC to market and lease space to retail businesses and to obtain exclusive corporate sponsorship contracts will be dramatically reduced if solicitation activities are present. Clearly, a corporate sponsor would not be willing to pay a significant amount to obtain the right to advertise their products within the Fremont Street Experience if their competitors can market their business for "free".

The Fremont Street Experience members did not unilaterally expect such changes to occur without placing itself at great economic risk by making certain monetary contributions. For example, the FSELLC made a capital contribution in the project in the amount of $18 million and agreed to fund operating expenses estimated to be approximately $8 to $10 million per year. Additionally, the FSELLC agreed to guarantee room tax collection, pay a fee in lieu of property tax, bear the responsibility of cost over-runs for the project and acquisition costs of the First Western Block in excess of $6.4 million to be paid from net rental revenue from the lease of space fronting on Fremont Street on the first floor of the parking garage project and most importantly, assume responsibility for all aspects of development and construction of the project.

The necessity of these ordinances has become personally apparent to me as I have observed for a number of years, there is a negative impact on our visitors to Fremont Street that is created by in-person solicitation as well as by the litter that is left on the sidewalks by such individuals. Visitors or patrons of downtown cannot enter any one of the four casinos located at Fremont Street and Casino Center without being aggressively approached by these individuals. At times, two or three individual solicitors will fight to control any one of the corners to a point where I have witnessed physical confrontations either between the competing solicitors, the patrons and police.

The success of the Fremont Street Experience should mean as much to the City as it does to the FSELLC because a significant share of the City Redevelopment Agency Funds (48%), as well as sales, property and room tax revenues, are derived from FSELLC members in order to ensure the force of such tax revenue. It is imperative that the Fremont Street Experience is a success.

In closing, it is my hope that you will actively support the passage of Bill Nos. 94-93, 94-95 and 94-96, and continue in your support of the revitalization of downtown and the success of the Fremont Street Experience.

Sincerely,

Barry

Barry A. Shier

BAS:ljm

Attachment No. 2

TESTIMONY OF
ARNI HALLING
ON BEHALF OF
THE FREMONT STREET EXPERIENCE
LIMITED LIABILITY COMPANY

BEFORE THE CITY OF LAS VEGAS
RECOMMENDING COMMITTEE

BILL NOS. 94-93, 94-94, 94-95 AND 94-96

December 19, 1994

Good afternoon. My name is Arni Halling, Senior Vice President of the Baker Leisure Group and representing the Fremont Street Experience in corporate sponsorship negotiations. Our firm specializes in corporate sponsorship for theme parks and attractions. In defining the term in its simplest form, corporate sponsorship is the transference of sale and marketing benefits in return for financial consideration.

In order to attract a sponsor, one needs to provide a commercially viable and entertaining environment that will generate:

1. Sales of sponsor's product.
2. Exposure of a sponsor's brand.
3. An image with which the sponsor wishes to associate.
4. Category exclusivity.

It is all of these elements that persuade a sponsor's company to allocate funds to the project. It is therefore critical that the Fremont Street Experience be operated in a manner which will achieve each of these elements. Without corporate sponsors, the project will lose the ability to generate revenues to offset the operating expenses associated with the project.

Corporate sponsorship has been targeted as a main vehicle for generating revenues and initial discussions with companies have proved to be very positive with respect to this downtown revitalization project and the potential for sponsorship that this project offers. However, without exception, each prospective company has expressed a real concern with the solicitation activities they have witnessed in the project area, and this has had a decidedly negative effect on negotiations. Moreover, this project is competing for sponsorships with other major projects and attractions within the Las Vegas area which have controlled environments.

In order to deliver a successful sponsorship program, we must be able to ensure that the customer at the Fremont Street Experience will enjoy a safe, comfortable and entertaining experience. The project must be user-friendly in order for major companies to want to associate their products with the experience.

As with other entertainment venues, we must be able to ensure category exclusivity to a company and its products. This is one of the foundations of corporate sponsorship negotiations. For example, in order for a company, such as Coca-Cola, to make a large financial sponsorship commitment over a contract term of ten years, they must be unequivocally assured that a competitor will not have the ability to intrude upon this exclusivity by soliciting customers within the project area.

It should be noted that another element of a sponsorship agreement is that a sponsor will commit significant marketing funds in order to promote the fact that they are exclusively associated with the project. This activity significantly benefits the Fremont Street Experience by augmenting its own advertising campaign. However, the sponsor will obviously not promote a location where its competitors' products are sold.

Attachment No. 3

TESTIMONY OF
JOHN FRANSEN
ON BEHALF OF
THE FREMONT STREET EXPERIENCE
LIMITED LIABILITY COMPANY

BEFORE THE CITY OF LAS VEGAS
RECOMMENDING COMMITTEE

BILL NOS. 94-93, 94-94, 94-95 AND 94-96

December 19, 1994

Good afternoon, my name is John Fransen. I am the retail consultant for the Fremont Street Experience charged with the responsibility of identifying prospective tenants for the available retail venues in the project. This project is designed to compete with upscale retail/entertainment centers such as the Forum Shops. In order to effectively compete with these venues, we must be able to provide the same kind of controlled environment so that both customers and tenant businesses feel comfortable with the overall environment. It is critical that we be able to confirm to potential business tenants that their customers will enjoy a safe, secure, positive, hassle-free shopping experience. The current negative environment on Fremont Street, caused by the abundance of solicitation activity, significantly limits our ability to attract good, stable and viable tenants for this project. It is essential that we be successful in our effort to bring quality tenants to this project, because lease revenue will be a major component in offsetting the projected $8-10 million per year in operating expenses for this project.

My point is simple: if solicitation activity occurs within the confines of this project, high quality tenants will not come and the tenants that do come will not generate the kind of lease revenue the project needs to meet operating expenses. Success depends upon a controlled environment within the confines of the project.

Attachment No. 4

MM R/C Meczka Marketing / Research / Consulting

Presentation of Michael A. Meczka
In Support of Bill Numbers 94-93, 94-94, 94-95 and 94-96
Before the Las Vegas City Council Recommending Committee
December 19, 1994

BACKGROUND

Michael A. Meczka, the principal of Meczka Marketing/Research/Consulting (MM/R/C), conducted several marketing/research studies for the Fremont Street Experience Limited Liability Company (FSELLC) regarding the proposed project including but not limited to downtown imagery among both locals and tourists. A series of separate projects were also conducted independently for Fitzgeralds Hotel/Casino regarding downtown casino development which also included downtown imagery among locals.

These projects were conducted in the period beginning October, 1993 through June, 1994.

Both qualitative and quantitative projects were conducted with both locals and tourists who were both visitors and non-visitors to downtown Las Vegas. Interviews were conducted in person and by phone. Interviews were conducted in Las Vegas with locals and tourists both in the downtown core and on The Strip. Further, focus groups were conducted in southern California which is, by far, southern Nevada's largest feeder market.

All studies were conducted in accordance with American Marketing Association and Marketing Research Association guidelines.

OBSERVATIONS

1. To the specific issue, it is particularly significant that in-market tourists who have experienced downtown Las Vegas are significantly less likely to visit downtown (61%) than those in-market tourists who have never visited downtown (72%). This can only be interpreted as disappointment or dissatisfaction with the anticipated experience. Combining this with the high negative perception (42% and 34%, respectively) of downtown which is highly influenced by the presence of in-person solicitation activity (18%) as well as simply being dirty (14%) one can logically conclude that in-person solicitation are certainly a contributing factor to the negative perception and low visitation associated with downtown Las Vegas.

Correcting these two areas would significantly improve the negative perception of downtown Las Vegas among tourists.

2. Further as many as 1 of 3 tourists perceive a general lack of safety in downtown Las Vegas.

3. Both local and feeder market study participants indicated the naming of the project to be secondary to the implied project benefits - safety and security - provided in a well-lit controlled environment.

4. The popular perception of "downtown Las Vegas" among both local and feeder market patrons is negative and not dissimilar from traditional concerns of decaying downtowns across the country.

   "Clean it (downtown) up. Make it safer and I'll probably go there."

   "Old" "Second-rate" "Tired" "Used" "Dirty" "Pan-handlers" "Not safe" "I won't go there after dark."

5. This is far more a project-development, marketing-execution issue than a naming issue. We have a classic case of declining share in the downtown core area as the entire market area is expanding. This is the same resulting principle as any downtown declines when suburban sprawl with resulting malls are developed. In Las Vegas's case, however, the product is gaming-entertainment and the malls are the expanding or new Strip casino properties.

6. Among locals, the biggest impediment to downtown casino visitation is an area issue, not a specific casino attribute issue.

   Some local patrons simply do not like downtown perceiving the area to be dirty, and unsafe with severe in-person solicitation associated problems. These locals prefer to select one of the neighborhood casinos for their controlled environment for gaming activity. As one locals stated,

   "There are too many other places where I can go and not be bothered by these kinds of people. The other casinos are newer, nicer, have parking right next door with great security and no panhandlers to bother me."

Although these patrons have recommendations for the ideal downtown casino, the concern is far more with perceived danger than physical improvements to a casino plant. If the area is perceived safe, patronage will increase.

7. Other than "being easy to get to" and "a place for serious gamblers" as well as "a place out of town tourists should see", there isn't much else that is rated good about downtown. Downtown is rated as having problems with everything from "looking run down" to "having a panhandling problem" and "not a place to visit alone" and "not appropriate for the whole family".

8. Each study individually and all studies collectively consistently indicate in person solicitation activities are definitely contributing factors to the lack of safety perceptions held by our sample regarding downtown Las Vegas. Although they may not be the sole or independent factor, they are certainly a strong contributing factor in decreasing visitation and decreasing visitation intent to downtown Las Vegas.

MM
R/C Meczka Marketing / Research / Consulting

MICHAEL ANTHONY MECZKA

PROFESSIONAL ACCOMPLISHMENTS

* Michael A. Meczka is the principal and sole proprietor of MMRC - Meczka Marketing/Research/Consulting, a full-service marketing, research, and consulting company founded in 1976.

* Under the personal direction of Michael A. Meczka, MMRC conducts over 200 research projects annually, and in the process interviews over 45,000 individual respondents using personal, telephone, mail and other survey methods.

MMRC has its own state-of-the-art facility for conducting qualitative research with residents of Southern California.

* Michael A. Meczka personally moderates focus groups locally, nationally and internationally.

* Acknowledged expert in gaming research.

* Legal expert witness in the area of marketing and research.

* Since 1984, guest lecturer in marketing research at Loyola Marymount University and at Northrop University.

* Guest speaker at American Marketing Association and Marketing Research Association meetings and seminars speaking on a variety of marketing and research related subjects. Examples include "A Guide For Conducting Focus Groups" - "Field Coordination and Management" - "Questionnaire Design and Development".

* 20-year member of American Marketing Association.

* 20-year member of Marketing Research Association.

MM
R/C Meczka Marketing / Research / Consulting

GAMING OVERVIEW

Meczka Marketing/Research/Consulting

MMRC is known for its consulting services to the gaming industry. At present, we are involved with projects in all four Nevada markets. In addition, we are also working on assignments for California card rooms, Indian reservations, Mississippi riverboats and a gaming development projects both domestically and internationally.

Our experience and understanding of the gaming industry is without peer among marketing research companies or consultants. During our 13+ years as consultants to the gaming industry, we have completed over 400,000 interviews and in excess of 750 focus group sessions with patrons of gaming facilities located in all US gaming markets, traditional and recently developed, as well as work in international markets.

The scope of our gaming-related projects covers all aspects of the total gaming experience. This includes, but is not limited to, initial development of the market/area (e.g., Laughlin, Nevada and Mississippi riverboats, Tunica), lodging, travel, food, entertainment, gambling and game development, both mechanical and table. Our approach is to custom tailor our efforts and consulting to the individual and unique needs of each client. Given our extensive experience since 1981 with numerous clients in the gaming industry, we have the ability to foresee problems and identify opportunities.

We have conducted a diverse array of projects for gaming clients. These include market and situation analyses prior to development/start-up, using primary and secondary information sources, and the construction of pro-forma. We are also respected for our ability to provide customized primary research techniques for the gaming industry using qualitative and quantitative techniques.

Within only the gaming industry, we consult with, among others:

Bicycle Club
Bell Club Casino
Fitzgeralds' Casino
Hilton Casino Hotels
California Commerce Casino
Reno Hilton
International Game Technology
Native American Casino Corp.
Mississippi Grand Casino
Showboat Hotel & Casino
Tigre Bay Resort & Casino
The Connelly Group

Caesars Palace
Eldorado Casino Hotel
Harrah's Casino Hotels
Rio Suite Hotel & Casino
California Regency Casino
Hyatt Resorts/Casinos
9'S UP Marketing Group
Las Vegas Hilton Hotel/Casino
Promus Companies
Gold River Gambling Hall & Resort
Flamingo Hilton Hotels & Casinos
Joliet Empress

Attachment No. 5

AFFIDAVIT

OF

JOHN F. MENDOZA

STATE OF NEVADA)
) SS:
COUNTY OF CLARK)

I, John F. Mendoza, being first duly sworn, do hereby depose and say as follows:

1. I am President of the Latin Chamber of Commerce (the "Chamber") for Las Vegas, Nevada. In that capacity, I am chief executive officer and am responsible for overseeing all of the activities conducted by the Chamber.

2. The primary purpose of the Chamber is to promote the interests of its constituent members. Many of these members are located in the downtown Las Vegas area and, as such, have been witnesses to and adversely affected by the declining business fortunes of downtown Las Vegas. Thus, to the extent that the planned Fremont Street Experience Project helps revitalize downtown, the success of the Project overlaps with the interests of our constituent members in that area. Thus, in the interest of our members located downtown, the Chamber supports the City's efforts in controlling solicitation activities in certain limited areas of the City, including the Fremont Street Experience commercial and entertainment project.

3. The Chamber is vitally interested in arresting the inter-City's decline and in encouraging the redevelopment and revitalization of downtown Las Vegas. Accordingly, we are in support of Bill Nos. 94-93, 94-95 and 94-96 because we believe they are reasonable means of addressing the problems associated with downtown.

4. The Chamber would like to hold special events within the Fremont Street Experience Project. The Chamber plans to use these events to promote the interests of the Chamber and its constituent businesses. However, the success of these events is directly dependent upon the Fremont Street Experience being a controlled environment where our members and guests will be free of harassment from solicitation activities. We must ensure that any facility used for our events will be a showcase, thereby enabling the Chamber to attract local, national and international visitors. Solicitation activity is incompatible with this goal. If this conduct is present, both our members and visitors will not return. Accordingly, in making a decision where to hold our events, we will take into consideration whether such activities are present or permitted in the facility where we hold our special events. If the environment is not free of these types of activities, the Chamber will choose not to use the Fremont Street Experience facility to hold its special events.

5. It is essential for the success of the Chamber's planned special events at the Fremont Street Experience that solicitation activities be prohibited within the specific limited confines of the facility itself. We believe this restriction is limited and reasonable, and serves to guarantee that the facility will be able to fulfill the purpose for which it was designed.

6. In addition, my personal experience and the experiences related to me by the members of the Chamber indicates that solicitation activities taking place at or near the entrances and exits of commercial buildings have a negative impact upon those businesses. Solicitors position themselves at or near the entrance to businesses. When this occurs, the businesses show a noticeable decline because potential patrons leave

rather than confront a solicitor at the entrance of the establishment. In our experience, this situation is repeated often, always with the same result. For that reason, we support a solicitation ban within 20 feet of the entrance to or exit from a business.

DATED this 19 day of December, 1994.

JOHN F. MENDOZA

SUBSCRIBED AND SWORN to before me

this 19 day of December, 1994.

Kathy A. Eisler

NOTARY PUBLIC

NOTARY PUBLIC
STATE OF NEVADA
County of Clark
KATHY A EISLER
My Appointment Expires March 24, 1998

Attachment No. 6

CLV DOWNTOWN REDEVELOPMEN
DOWNTOWN AREA
ASSESSED VALUE AND TAX INCREMENT REVENUE
FISCAL YEARS 1993-94 & 1994-95

(IN 000'S)

HOTEL/CASINO	ASSESSED VALUE 93-94	94-95	BASE YEAR 85-86	INCREMENT REVENUES 93-94 3.0204	94-95 3.0322
GOLDEN NUGGET	62,400	63,470	28,476	1,025	1,061
UNION PLAZA	32,703	32,981	28,217	135	144
CALIFORNIA & FREMONT	31,272	31,776	21,916	283	299
HORSEHOE	19,456	19,874	14,940	136	150
EL CORTEZ	19,285	19,756	9,961	282	297
FOUR QUEENS	17,213	17,695	13,793	103	118
LADY LUCK	14,765	15,195	2,346	375	390
FITZGERALD'S	14,057	14,458	10,816	98	110
LAS VEGAS CLUB	20,708	21,305	16,110	139	158
GOLD SPIKE	3,392	3,490	2,629	23	26
GOLDEN GATE	5,577	5,738	4,725	26	31
HOTEL NEVADA	2,328	2,395	4,344	0	0
TOTAL	243,156	248,133	158,273	2,625	2,784
TOTAL RDA ASS'D VALUE	603,362	612,658	424,954		
% 0F DWNTWN TO TOTAL	40.30%	40.50%	37.24%		
TOTAL RDA REVENUE				5,389	5,692
% OF DWNTWN REVENUE TO TOTAL				48.71%	48.91%

EXHIBITS

OF

THE FREMONT STREET EXPERIENCE LIMITED LIABILITY COMPANY

Before the City of Las Vegas
Recommending Committee

Bill Nos. 94-93, 94-94, 94-95 and 94-96

December 19, 1994

Attachment No. 1

INDEX

TESTIMONY OF
KATHILYNN CARPENTER
ON BEHALF OF
THE FREMONT STREET EXPERIENCE
LIMITED LIABILITY COMPANY

BEFORE THE CITY OF LAS VEGAS
RECOMMENDING COMMITTEE

BILL NOS. 94-93, 94-94, 94-95 and 94-96

December 19, 1994

My name is Kathilynn Carpenter and I am Vice President of the Fremont Street Experience Limited Liability Company (The "Company"). I am here today on behalf of the Company, and each of its 10 members, speaking in support of Bill Numbers 94-93, 94-94, 94-95 and 94-96. At this time, I would like to introduce and ask the Council to accept into the record my written comments, together with a number of exhibits which I will be referring to and discussing throughout my presentation. While many of my remarks are specifically directed in support of subsection F of Section 10.44.030 of Bill No. 94-95, my comments are also applicable to the other bills before you today (*i.e.* 94-93, 94-94 and 94-96).

My presentation will be divided into four parts. First, I will discuss why the City created the Pedestrian Mall for the Fremont Street Experience Project (the "Project"), and why the Project is essential to ensuring the success of economic revitalization downtown. Second, I will describe the Project itself in terms of its purpose and structure, and explain its character as a commercial enterprise and entertainment complex. Third, I will discuss why certain limitations and restrictions contained in the City's proposed ordinances are reasonable, considering the purpose of the Project, and further explain why solicitation activities are incompatible with the Project's nature and purpose. Finally, I will describe the efforts that have been undertaken and are being pursued by the Company to address quality of life issues downtown.

I. The Need for the Project.

You may recall that the Project came into being to attract new businesses, tourists and visitors to the central business district of the City of Las Vegas, and thereby restore the economic growth and vitality of the downtown area. As we all know, downtown has been experiencing an economic down turn for some time. For example, downtown's share of the gaming revenue market has decreased from 21% in 1988 to 16% in 1993; downtown's share of room inventory has decreased from 21.5% in 1982 to 13.5% in 1994; downtown hotel and casinos have experienced a 3.5% decrease in revenues for the first six months of 1994 while strip casinos experienced a 23.5% increase during the same period. The fundamental purpose of establishing the Pedestrian Mall and the Fremont Street Experience was to avoid economic collapse of the businesses located in the downtown area. Very simply, its purpose is to attract tourists and other visitors to the area and to prevent further decline by restoring economic growth and vitality.

At the time the City established the Pedestrian Mall to address the severe economic conditions, it determined it was in the best interest of the City to contract with a private company not only to develop and construct the project, but also to manage and operate it. In committing to do so, the Company entered into a development agreement and a management agreement with the City. In undertaking this responsibility, the

Fremont Street Experience Company and its members took on an enormous risk. We made capital contributions to the Project in the amount of $18 million dollars and are responsible for construction cost overruns; we agreed to fund operating expenses for the Project estimated to be in the range of $8 to $10 million per year; we agreed to guarantee room tax collection sufficient to service the principal and interest payments on the room tax bonds; we agreed to collateralize this guarantee with assets; we were required to fund a $400,000 room tax reserve fund to be replenished within six months whenever it falls below that amount; and we were required to pay a fee in lieu of property tax. We took on these risks in recognition that drastic measures needed to be taken to revitalize downtown.

The City has a significant interest in the success of the Project as well. Approximately 48% of all of the City's redevelopment funds are provided by eleven downtown hotel casinos, ten of which are members of the Company. In addition, a significant portion of the City's total sales, property and room tax revenues are provided by this downtown core. These revenues are used as support for City wide services and projects -- not only for those located downtown, but throughout all areas of the City. Without the downtown core hotel/casinos, therefore, the City stands to lose a highly substantial base of revenue support. In essence, the City <u>needs</u> the Fremont Street Experience Project to succeed.

The City also has a proprietary interest in seeing this Project succeed. For example, it issued $21 million in bonds based upon anticipated downtown room tax revenues; its Redevelopment Agency issued $22.175 million in bonds of which $18.8 million is based upon anticipated tax increment; and $5.6 million of general obligation bonds have been issued for construction of and improvements to the Project. Nearly $50 million in bonds are at risk if the Project does not succeed. Together with the funds, a significant level of time, effort, public services, inconvenience and expense has been invested in the effort to promote and build the Fremont Street Experience Project. We must do everything we can to ensure its success.

II. Nature and Purpose of the Project.

I would like to take a few moments to describe the physical nature of the Project and to discuss its purpose. It is important to understand that the design and construction of the Project are geared toward completely transforming what we know as Fremont Street today into a commercial and entertainment complex. It is the Project's characteristics as a commercial and entertainment venture which necessitate the reasonable restrictions which are being proposed by the City.

[Show and refer to renderings and photographs, Tab B in the exhibit binder.]

The boundaries of the Project are fairly narrow and include Fremont Street from Main to Las Vegas Boulevard, and 150 feet north and south on each street within. These five blocks will be transformed into a dynamic attraction. Street and sidewalks are being completely removed and replaced with a patterned floor treatment including 200 palm trees. The area will bustle with entertainment. Cafes and bistros will tempt the palate and merchants will sell their wares from festive pushcarts and elaborate kiosks. Overhead will loom a space frame, nearly 100 feet high and approximately 1500 feet in length -- the longest ever constructed. While shading visitors from the harsh Las Vegas sun, it will also host the Project's must-see attraction -- the sky parade and light show. Set into the surface of the space frame will be approximately 2 million lights. These lights will come to life nightly in a multisensory show, imposing in it its magnitude. A series of images will move across the expanse of the space frame choreographed to symphonic sound -- provided by no less than 200 speakers. Numerous special events -- from sporting exhibitions to music festivals -- will be played out here. The lighting of the Christmas tree at Rockefeller Center will pale in comparison to the holiday festival of lights that will dazzle visitors.

This Project must compete with not only the current "must-see" attractions, but also the next generation of them as well. Much like the MGM, Mirage and Luxor, the Project must create an atmosphere of excitement, activity and entertainment in a safe, comfortable, attractive environment.

Every aspect of the Project is designed to encourage commerce. The Company, in order to offset operating expenses, must have the ability to generate revenues through commercial uses throughout the Project. The Company will lease retail space; as well as areas for parties, conventions and product displays. We will contract with production companies who wish to film within the Project, and we will sell advertising to corporate sponsors and others. We will contract with groups that wish to use areas within the Project for special events -- events which are designed to bring visitors and residents to the Project.

III. Why The Restrictions Are Limited and Reasonable.

As a commercial project in which the City of Las Vegas has a proprietary interest, it is reasonable for the City Council to prohibit *all* activities which are counterproductive to the objectives and purpose of this commercial and entertainment project.

Solicitation activities are fundamentally incompatible with the character and function of the Project. Therefore, we are supportive of the City's proposal to limit solicitation activities in the downtown area to places outside of the boundaries of the Pedestrian Mall (Subsection F of Section 10.44.030 of Bill 94-95).

Solicitation activity within the Project would compete with its businesses for its patrons' money -- money needed to meet the operating expenses of the Project.

An equally significant concern is the protection of Fremont Street Experience patrons from unwanted intrusions upon their privacy and enjoyment of the Project. Like passengers on public transportation, travelers in an airport, or spectators at a stadium, patrons of the Project are a "captive audience." They are "captive" because they may well be unable to escape an unwanted solicitation within the confines of the Fremont Street Experience. One can imagine patrons sitting down at a cafe to enjoy a cup of cappucino and being approached by a solicitor asking for a donation or asking for patronage of the solicitor's business. Patrons would be unable to avoid this unwanted and unwelcome message, and it may well convince them (and whomever they tell of the experience) to leave and never return.

Similarly, persons queuing at a kiosk or a vendors' cart to make a purchase, where space is tight, time is short, purses are open and money is in hand, are also a captive audience unable to avoid or, perhaps, resist an unwelcome solicitation. What customer would want to open their pocketbook to make a purchase, knowing a solicitor will be standing beside them requesting a handout or requesting their patronage elsewhere? This, too, may well convince the patron and others who witness the activity to leave and never return.

This situation is compounded where Project patrons will be gathered in crowds to watch the live entertainment, events or light show. Who will want to stay and watch the show if they are subjected to solicitors working the crowd? Again, solicitation activity may well convince this captive audience to leave the Project and never return.

There are at least four other reasons why the limited restriction set forth in subsection F of Section 10.44.030 of Bill 94-95 is reasonable and necessary, and addresses the significant interest identified by the City in revitalizing downtown.

A. First, we know that potential corporate sponsors -- which are an essential source of revenue upon which the commercial success of this venture may rest -- are negatively influenced by solicitation activities in making decisions whether or not to pay significant amounts to obtain exclusive rights to advertise their products within the Project. Arni Halling, the Company's representative in corporate sponsorship negotiations, is here today to comment on the impact solicitation activity has on the ability to obtain sponsorships.

B. Second, we know that potential lessees of retail establishments are negatively influenced by solicitation and pedestrian interference activities in making their business decisions. Here today is John Fransen, who will testify regarding the impacts of solicitation activities on the Project's ability to lease retail space within the Project.

C. Third, we know that potential sponsors of special events will not agree to hold their activities in the Project if solicitation activities are not restricted.

D. Fourth, we know today that there is a widely held perception that downtown has an abundance of solicitation activities. People view these activities in a negative manner and are influenced by their actual or perceived presence in making decisions whether or not to come downtown.

For example, in 1990, the Downtown Progress Association ("DPA") contracted with the University of Nevada, Las Vegas ("UNLV") Hospitality Research Department to conduct a survey to discover what visitors and residents like and don't like about downtown. The results were disturbing -- indicating that both visitors and residents alike perceived downtown to be unsafe.

In 1993, the DPA requested that UNLV conduct another survey; unfortunately, the concerns remained the same. [These studies are contained in the exhibit binder under Tab C.]

In May of 1994, the DPA commissioned Progressive Urban Management Associates to study the viability of creating a broader downtown association. A series of focus groups with several businesses downtown representing diverse industries and services was held. Each focus group felt that one of the significant weaknesses of downtown is the abundance of solicitation activities in its core area. [A copy of the report is contained in the exhibit binder under Tab D.]

Further, this year, the Company contracted with Meczka Marketing/Research/Consulting ("MMRC") to conduct two studies, one to determine the viability of the Project's name and the other to gauge visitor perceptions of downtown Las Vegas; the studies indicated that solicitation activities were contributing factors in affecting visitors' decisions not to go downtown. Mr. Michael Meczka the owner of MMRC, was responsible for overseeing those studies and is here to briefly discuss them. The studies referred to by Mr. Meczka are contained in the exhibit binder under Tab E. [Michael Meczka's presentation]

Additionally, the Las Vegas Convention and Visitors Authority ("LVCVA") has amassed a great deal of market research. By 1990, the LVCVA became concerned with the negative image of downtown. The LVCVA documented the negative impact solicitation activities have had on the downtown area. Every other year, GLS Research conducts a survey of Clark County residents under the direction of the Las Vegas Convention and Visitors Authority. One of the conclusions of both the 1990 and 1992 reports was that among residents who gamble, some residents do not gamble downtown because they have a negative image of the area. In 1990, seventeen percent of those residents who were not currently gambling downtown stated they believed downtown to be dirty, uncomfortable and not a safe neighborhood. In 1992, sixteen percent had communicated these same concerns. These perceptions, based upon downtown's negative environment, are sounding the death knell of this once thriving tourist center. The LVCVA feels that if the current negative environment cannot be managed, the Fremont Street Experience will fail as a destination, and downtown will continue its downward spiral.

The LVCVA hopes to position the Fremont Street Experience as a major venue for special events. In order to attract major events to the area it must be able to promise a controlled environment in much the same way as it does at the Convention Center, the Thomas & Mack Arena and the Silver Bowl. The LVCVA studies are contained in the exhibit binder under Tab F.

Further, the negative image of downtown is wide spread and is further reinforced by the media. [Refer to newspaper articles in the exhibit binder, Tab G.]

Everyday we are reminded of the negative impact this type of activity has on our visitors. Comments by visitors to our Preview Center inevitably focus on the obstacle course of the disruptive/obstructive activity they maneuvered through on their way to the center. [A representative sample of these comments are contained in exhibit binder under Tab H.] Just last week, we hosted a group of important travel executives. During a tour of the Project, the group was attacked by a brigade of costume-clad horsemen pressing unwanted coupons into their hands. Needless to say, it negatively colored their opinion of downtown Las Vegas. Neither Don Snyder, President of the Company, nor myself, has yet to give a presentation on the Project where these concerns have not been raised.

This Project and the entire Pedestrian Mall is a commercial venture, intended to eventually pay for itself by generating revenue for the operating entity, whether that entity is the City or the City's designee. It is intended to provide a world-class attraction to bring tourists back to the sagging downtown businesses. If solicitation is permitted to occur in this Project without restriction, the Project will not fulfill its intended use and the purpose for which it was constructed. Solicitation will cause loss of patronage, and will seriously challenge the success of this venture.

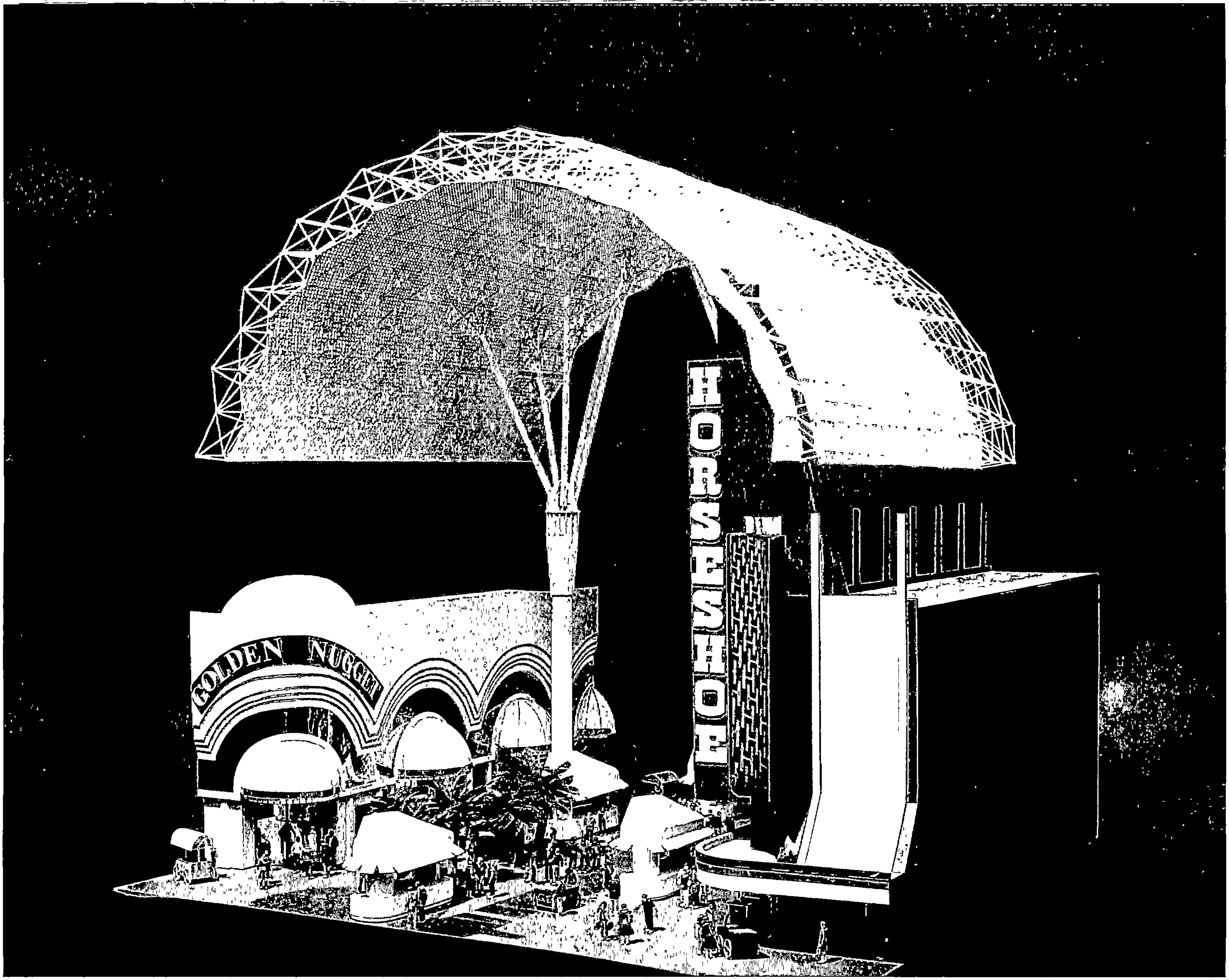
IV. Conclusion.

In conclusion, <u>we recognize that there are other factors which have contributed to the precarious economic situation downtown</u>. Certainly, the development of mega-resorts on the strip; competition from Laughlin, neighborhood and stateline casinos along with the proliferation of gaming outside the state have all taken their toll. However, we have addressed this competition by transforming Fremont Street into a mega-resort with its own must see attraction. Additionally, each of our individual members has already begun or is committed to improving and expanding its properties.

<u>Specific to public safety issues, we have supported a number of measures of which these ordinances are one part</u>. We believe a multi-lateral approach will best address these issues. The Company will hire approximately 75 employees, of those, 60 will be dedicated to security and cleaning. We have worked closely with the Metropolitan Police Department ("Metro") in the environmental design of the Project. And, as you know, we recently donated $30,000.00 to Metro which has enabled them to double the coverage of the bike patrol downtown. Additionally, we have supported and are a

member of the Downtown Las Vegas Partnership. We believe that the health and viability of the broader downtown area is critical. The Fremont Street Experience cannot exist as an island of success amid a sea of decay.

We are also addressing solicitation activity through education. The Public Safety Committee of the Partnership will soon be initiating the Positive Change Campaign. This campaign asks people to contribute in a more positive way - specifically to M.A.S.H. - a City of Las Vegas/Clark County facility which will centralize all the services someone needs to break the cycle of homelessness. The Partnership's volunteer group Downtown Community Partners will focus on improving our downtown through a series of projects such as Adopt-A-Shelter. This program is designed to bring downtown resources and employees together to improve current conditions in downtown homeless shelters.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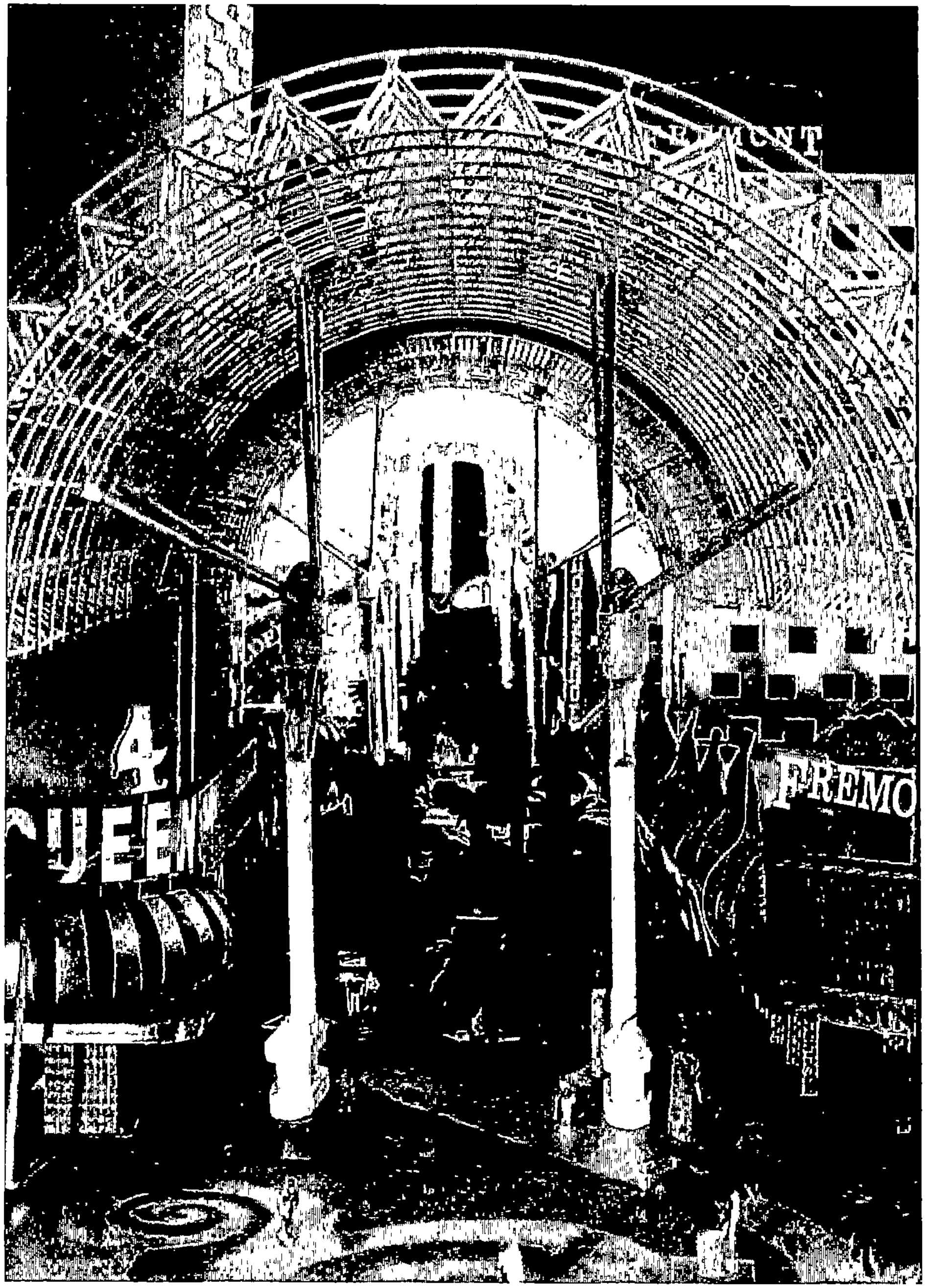
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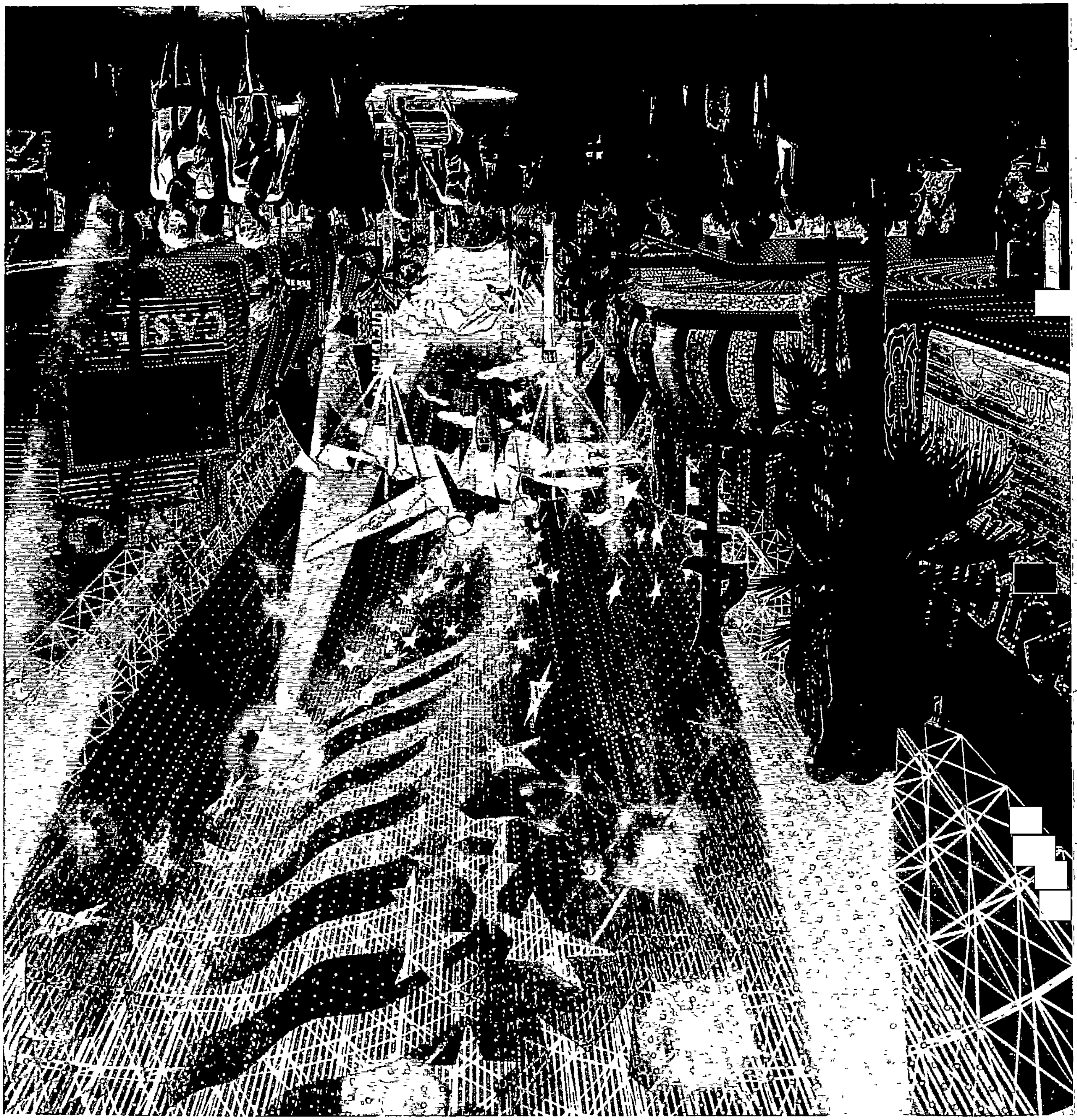

AFFIDAVIT OF E. KEITH SCHWER, Ph.D.

STATE OF NEVADA)
) ss:
COUNTY OF CLARK)

I, **R. KEITH SCHWER**, being first duly sworn, do hereby depose and say as follows:

1. I am Director of the Center for Business and Economic Research ("Center") at the University of Nevada-Las Vegas. My curriculum vitae is attached hereto as Exhibit A. In my capacity as Director of the Center, I have personal knowledge of all matters set forth herein and am competent to so testify.

2. In 1990, the Center prepared a report entitled "Las Vegas Gaming Survey: 1990 Executive Summary and Major Findings" for the Las Vegas Downtown Progress Association. The report was prepared by me or under my direction and supervision and reported the results of a series of surveys conducted by the Center. These surveys were conducted by me or under my supervision, using generally accepted procedures. The written report truly and accurately reflects the results of the survey.

3. In 1993, the Center prepared a report entitled "The Downtown Las Vegas Visitor: 1993" for the Las Vegas Downtown Progress Association. The report was prepared by me or under my direction and supervision and reported the results of a survey conducted by the Center. This survey was conducted by me or under

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my supervision, using generally accepted procedures. The written report truly and accurately reflects the results on the survey.

R Keith Schwer

R. KEITH SCHWER, Ph.D.

SUBSCRIBED and SWORN to before me

this 16th of ~~June~~ December, 1994.

Eric Garth

NOTARY PUBLIC

NOTARY PUBLIC
STATE OF NEVADA
County of Clark
ERIC GARTH
My Appointment Expires July 8, 1998

Vita

R. Keith Schwer

September 1993

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1. EDUCATION

Ph.D., Economics, University of Maryland, 1975
M.A., Economics, University of Oklahoma, 1967
B B A., Statistics, University of Oklahoma, 1964

Post Doctoral Study

University of Washington, Summer 1989
Brown University, Summer 1978
University of Chicago, Summer 1976

Fields of Study

Corporate Finance, Economic Theory, History of Economic Thought, Monetary Theory and Policy, Public Finance, and Statistics

2. EMPLOYMENT HISTORY

Director, Center for Business and Economic Research, and Associate Professor of Economics, University of Nevada, Las Vegas, 1986 to date

Head, Division of Business and Management, Norwich University, 1979 to 1985

Associate Professor, Department of Economics and Finance, Norwich University, 1978-1986

Assistant Professor, Department of Economics and Finance, Norwich University, 1974-1978

Instructor, Department of Economics, University of Maryland, 1971-1974

Research Assistant, U.S. Department of Education Grant, Analysis of Educational Expenditures in the States, University of Maryland, 1971

Statistician, U.S. Bureau of Wildlife and Fisheries, Summer, 1970

Research Assistant, Bureau of Business and Economic Research, University of Wyoming, 1968-1969

Research Associate, Center for Business and Economic Research, University of Tennessee, 1967-1968

Graduate Teaching Assistant, Department of Economics, University of Oklahoma, 1964-1966

Research Assistant, Bureau of Business and Economic Research, University of Oklahoma, 1964

3. TEACHING ACTIVITIES

Courses taught (UNLV): History of Financial Thought, Money and Banking, Public Finance, and Principles of Economics (undergraduate); Public Finance, and Political Economy (graduate).

Courses taught (Norwich): Managerial Finance,Investments, Advanced Finance, Money and Banking, Public Finance, Intermediate Microeconomics, Intermediate Macroeconomics, Econometrics, History and Development of American Capitalism, History of Economic Thought, Principles of Economics (Micro and Macro), Marketing Research, Comparative Economic Systems. Graduate level: Financial and Monetary Theory, Environmental Economics.

4. PROFESSIONAL PAPERS PRESENTED

"The Consistency of Ready-Made Regional Economic Impact Model Version Over Time. The Case of REMI and IMPLAN for Southern Nevada," with Dan S Rickman, a paper presented at the Pacific Regional Science Conference Organization, July 13, 1993.

"A Systematic Comparison of the REMI and IMPLAN Models: The Case of Southern Nevada, with Dan S. Rickman, a paper presented at the Western Regional Science Association, February, 21-25, 1993

"Pet Health Care Insurance and Adverse Selection," with Nasser Daneshvary and Don Hardigree, a paper presented at the Annual Meeting of Southern Risk and Insurance Association, November 22-24, 1993.

"Black Immigrants in the U S. Labor Market: An Earnings Analysis," with Nasser Daneshvary, a paper presented at the Western Regional Science Association, February 23-27, 1992.

"On Optimal Industrial Diversification: A Study of the Diversification of the Southern Nevada Area," with W. Gaynor, a paper presented at the Western Regional Science Association, February, 1991.

"Price and Income Elasticities of the Demand for Pet Health Care Insurance," with Nasser Daneshvary, a paper presented at the Western Social Science Association, April, 1991.

"Building Business Research Constituencies," a paper presented at the Association of University Business and Economic Research, October, 1991.

"Allan G. Gruchy and Charles L. Schultze on Effective Public Planning," a paper presented at the Western Social Science Association, April 24-27, 1991.

"Funding Research Through Subscriptions: A Case Study of a Housing Market Conditions Quarterly Report," a paper presented to AUBER/AACSB, April 13, 1991.

"On Calibrating the UNLV Nevada Regional Models: A Prelude to the Investigation of the Impact of Water Shortage Induced Growth Restriction on the Las Vegas Area Economy," with Thomas M. Carroll
and William T. White, a paper presented at the Western Economics Association, July, 1990.

"Using a Multi-Regional Forecasting and Simulation Model to Estimate the Effects of Military Base Closure," a paper presented at the Western Economic Association, July 3, 1990.

"Community Concerns and the Nuclear Repository Issue: Findings Using a Linear Logistic Response Model," with Tom Pathamavanu and Jack Schibrowsky, a paper presented at the Western Social Science Association, April, 1990

"Local Economic Impact Assessment of the Nevada Test Site: A Methodological Prelude to Socioeconomic Assessment of Proposed Yucca Mountain High-Level Radioactive Waste Repository," a paper presented at the International High Level Radioactive Waste Management Conference and Exposition, April 8-12, 1990.

"When One Industry Just Isn't Enough: A Study of the Diversification of the Southern Nevada Area," with Christopher Meenan, a paper presented at the Western Social Science Association, April, 1990.

"Measuring the Extent of Subterranean Activity in a Service-Oriented Economy," with T. Carroll, a paper presented at the Western Economics Association, August, 1988.

"The Origin of the Study of Corporate Finance in the United States: The Pragmatic Roots of Arthur Stone Dewing," a paper presented at the Western Social Science Association, April 27, 1989.

"Problems in Measuring Subterranean Activity in a Service-Oriented Economy," with T. Carroll, a paper presented at the Western Regional Science Association, February 20, 1989.

"A Preliminary Examination of Exploratory Data Analysis in Real Estate Valuation Methodology," with Richard Hoyt, a paper presented at the American Real Estate Society, April, 1989.

"Analysis and Outlook for the Nevada Economy," a paper presented at the Western Economic Association, June 20, 1989.

"An Investigation into the Contributory Determinants of Housing Prices," with Richard Hoyt, a paper presented at the American Real Estate Society, April, 1988.

"A Preliminary Investigation Into the Contributory Determinants of Housing Prices--Cul-de-Sacs and Converted Garages," a paper presented to the American Real Estate Society, 1988.

"Okun's Misery Index and the Measurement of Forgone Economic Well-being," a paper presented at the Eastern Economics Association Meetings, April 12, 1986.

"The Estimation of Income Inequality for Small Populated Areas: The Case of Vermont," a paper presented at the Northeastern Business and Economic Association Meetings, November 7, 1985

"Bankers' Perceptions of Women's Knowledge of Their Credit Rights: Some Survey Findings," with Jeffrey P. Kilgore, a paper presented at the Northeastern Business and Economics Conference, November, 1984.

"A Spline Estimated Distributed Lag Model of the Business Cycle," with P. W. Isley, a paper presented at the Eastern Economics Association, March, 1984.

"Income Distribution in Eastern Canada: Marketing Implications," with John Hurd II, a paper presented at the World Marketing Congress, Halifax, Nova Scotia, November 3, 1983.

"Income Distribution in Eastern Canada," with John Hurd, a paper presented at the Eastern Economic Association, April, 1982.

"A Simultaneous Equation Model of Unemployment Estimated for Intertemporal and Interregional Effects," with John Hurd and P.W. Isley, a paper presented at the Eastern Economic Association, April, 1981.

"A Test of Structural Unemployment Using the Technique of Pooling Cross-Section and Time Series," with J. Hurd and P.W. Isley, a paper presented at the Atlantic Economic Association, October, 1980.

"Income Distribution in the Maritimes and Quebec: A Cross-Sectional Analysis," with J. Hurd, a paper presented at the Eastern Economic Association, May, 1980.

"Distribution of Family Income in New England Counties· 1950-1970," with John Hurd, a paper presented at the Eastern Economic Association, May, 1979.

"The Northeast-Sunbelt South Controversy and Some Findings Using Discriminate Analysis," with P.W. Isley, a paper presented at the Eastern Economics Association, April, 1978.

5. PUBLICATIONS, PERFORMANCE OR CREATIVE ACTIVITIES

(a) In Refereed Journals

"An Analysis of Pet Health Care Insurance." (with Nasser Daneshvary and Donald Hardigree). Forthcoming in the *Journal of Insurance Issues*, October 1993.

"A Systematic Comparison of the REMI and IMPLAN Models: The Case of Southern Nevada." (with Dan Rickman). Forthcoming in *The Review of Regional Studies*, 1993.

"The Determinants of Professional Rodeo Attendance " (with Nasser Daneshvary and Dan S. Rickman). Forthcoming in the *Journal of Cultural Economics*, 1993.

"Estimating the Economic Impacts of a Hub Airline Serving a Tourist Destination: The Case of America West Airlines and Las Vegas, Nevada." (with John H. Brown, Thomas M. Carroll, and Dan S. Rickman). Forthcoming in the *International Journal of Public Administration*, 1993.

"The Nature of Demand for Companion Pet Health Care." (with Nasser Daneshvary). The *Journal of Applied Business Research*, Vol. 9, No. 4, Fall 1993, pp. 24-32.

"Job Selection Criteria in Finance Faculty Recruiting." (with Ike Mathur and Tom Schwarz). Forthcoming in the *Journal of Financial Education*.

"The Number and Characteristics of Nevadans Without Health Insurance: 1992." (with Rennae Daneshvary and Dan Rickman). *Nevada Public Affairs*, November, 1992, pp. 57-60.

"A Note on Homebuyer Attitudes Toward a Nuclear Repository." (with William Thompson and Richard Hoyt). *The Journal of Real Estate Research*, 7:227-233, Spring 1992.

"Not in My Backyard: Las Vegas Residents Protest Casinos, *Journal of Gambling Studies*, (with William Thompson, Richard Hoyt, and Dolores Brosnan). 9:47-62, Spring 1993.

"Nevada Regional Models: Forecasting and Simulation". (with Thomas M. Carroll). *Nevada Review of Business and Economics*, 14: 2 (Spring, 1990), p. 10-18

"A Study of Risk-Taking Propensities Among Small Business Entrepreneurs and Managers: An Empirical Evaluation." (with U. Yucelt). *American Journal of Small Business* Vol. III, No 3 (Winter, 1984), pp. 31-40.

"The Distribution of Family Income In New England SMSA's: 1970." (with J. Hurd). *Atlantic Economic Journal*, (Abstract) Vol. VIII, No. 1 (March, 1980), p. 79.

(b) Other Professional Publications

i. Proceedings

"Local Economic Impact Assessment of the Nevada Test Site A Methodological Prelude to Socioeconomic Assessment of the Proposed Yucca Mountain High-Level Radioactive Waste Repository," with Thomas M. Carroll in The Proceedings of High-Level Nuclear Waste Conference, Las Vegas: Nevada, 1990, pp 965-969.

"Urban and Rural Differences of Risk-Taking Propensities among Small Business Entrepreneurs and Managers: Evidence from Empirical Evaluation," with William H. Murphy and U. Yucelt in Small Business Institute: Twelve Years of Progress, Robert J. Kerber, Editor, Normal Illinois: Illinois State University, February, 1984, pp 249A-249J.

"Industrial Diversification and Employment in Vermont: The Application of Portfolio Theory to Regional Employment," with J. Hurd in Proceedings of the New England Business and Economic Association, September, 1983.

"A Regional Employment Forecasting Model Using the Box-Jenkins Transfer Function in a Shift-Share Analysis Framework," with P.W Isley in Proceedings of the New England Business and Economic Association, November, 1983

"Industrial Structure and the Income Distribution in New England Counties," with John Hurd in Proceedings of the New England Business and Economic Association, November, 1982.

"A Study of the Risk-Taking Propensities Among Small Business Entrepreneurs and Managers: Evidence From An Empirical Study in Vermont," with U. Yucelt in the Proceedings of the Small Business Research Conference, Waltham, Mass.: Bentley College, March, 1982, pp. 434-447.

"Off-Farm Labor Supply: A Case of the New England Farmer," with John Hurd and P.W Isley, In Proceedings of the New England Business and Economic Association, November, 1981.

"Why New Englanders Work: Labor Force Participation Rates In New England: 1960-1980," with J. Hurd and P.W. Isley In Proceedings of the New England Business and Economic Association, November, 1980.

"Interstate Consumption of Distilled Spirits in New England," in Proceedings of the New England Business and Economic Association, October, 1978.

"Regionalist Fiscal Equity in New England: Some Findings Using Discriminate Analysis," with P.W. Isley in Proceedings of the New England Business and Economic Association, October, 1977.

ii. Research and Technical Reports (Principal Investigator)

Colorado Gaming: Taxation and Economic Performance. Las Vegas, Nevada· Center for Business and Economic Research, UNLV, with Richard G. Elmendorf and William N Thompson, September 1993.

The Economic Impact of Golf on Las Vegas. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Dan Rickman and Rennae Daneshvary, August 1993.

The Economic Impact of Non-resident Labor: The Case of Construction Workers in Southern Nevada. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Dan Rickman and Rennae Daneshvary, August 1993.

Senior Dimensions' Satisfaction Survey· 1993. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, July 1993.

Health Plan of Nevada's Membership Satisfaction Survey: 1992. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary and Tina Bejrananda, March 1993.

Health Plan of Nevada Dental Patient Satisfaction Survey: 1992. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, November 1992.

Economic Impact of Citibank on Clark County, Nevada: 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Dan Rickman, October 1992.

The Impact of Water-Imposed Interruption of Growth in the Las Vegas Region. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with William T. White and Tom M. Carroll, August 1992.

Health Insurance Coverage of Nevadans. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, Dan Rickman, and Beverly Crane, August 1992.

Economic and Demographic Projections for Major Water Purveyors in Southern Nevada· 1990-2030. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with George Fussell, August 1992.

Preference for a Proposed Low Cost Residential Telephone Option. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Beverly Crane and Suzanne Ulinch, June 1992.

Sierra Health Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, May 1992.

Greater Las Vegas Association of Realtors' Membership Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, April 1992.

Combined Findings of Three Rodeo Fan Surveys· 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, April 1992.

The Quarry· Economic Benefits and Community Compatibility. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Dan Rickman, Rennae Daneshvary, and Blair Lund, April 1992.

Health Plan of Nevada's Membership Satisfaction Survey· 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, March 1992.

Comprehensive Housing Affordability Strategy: 1992-1996. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, January 1992.

National Finals Rodeo Fan Survey· 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Mohammed Risheg and Rennae Daneshvary, January 1992.

The Impact of American West Airlines on the Nevada Economy. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Tom M. Carroll, John H. Brown, and Dan Rickman, November 1991.

Nevada Economic Outlook for 1992. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, November 1991.

Green Valley Athletic Club Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with

Rennae Daneshvary, October 1991.

Year-round Schools: Issues and Concerns of Clark Country Residents. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, October 1991.

The Economic Impact of the Relocation of the 37th Tactical Fighter Wing. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, September 1991.

Southwest Vision's Patients' Satisfaction Survey: 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, October 1991.

Socio-Economic Studies Focusing on Clark County, Nevada and the Proposed Yucca Mountain Repository. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, August 1991.

Health Plan of Nevada Senior Dimensions Membership Survey: Fall 1990 Las Vegas, Nevada: Center for Business and Economic Research, UNLV, June 1991.

Senior Dimensions' Termination Survey 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, June 1991.

Shadow Ridge Absorption Study for Nelson Homes Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Blair Lund, June 1991.

EM TV Quarterly Report Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, June 1991.

Employment Cyclicality in the Las Vegas Valley Economy. Las Vegas, Nevada Center for Business and Economic Research, UNLV, with Tom M. Carroll, May 1991.

Green Valley Nonresident Shopping Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, May 1991.

Health Plan of Nevada's Membership Satisfaction Survey· 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, March 1992.

Southern Nevada Area Health Care Center Needs Assessment. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Mohammed Rlsheg, March 1991.

Home Selection Decisions and the Proposed Yucca Mountain High-Level Nuclear Waste Repository. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with William Thompson and Richard Hoyt, February 1991.

Survey of Recreation, Gaming, and Entertainment of Residents of Henderson, Nevada. Las Vegas, Nevada· Center for Business and Economic Research, UNLV, with George D. Ormiston and Suzanne Ulrich, February 1991.

A Comparison of Alternative Configurations of Econometric Models for Southern Nevada. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with William Gaynor, January 1991.

Local Gaming Preferences and Activities among Las Vegans· Findings from a Telephone Survey Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, January 1991.

A Study of Boulder City Residents Opinions about the Attributes of their Community with an Emphasis on the City's Future Economic Base. Las Vegas, Nevada: Center for Business and Economic Research: UNLV, September, 1990.

Taxicab Usage, Medallion Allocation, and Fare Rate Adjustments, Las Vegas, Nevada. Center for Business and Economic Research: UNLV, with Jack Hart and John Brown, 1990.

Local Transportation Survey: Estimating the Demand for High-Tech Maglev Train Service Las Vegas, Nevada: Center for Business and Economic Research: UNLV, with Tom Carroll, 1990.

Nevada Housing Needs Assessment and Economic Modeling, Las Vegas, Nevada: Center for Business and Economic Research, University of Nevada, Las Vegas, 1990.

Preliminary Housing Needs Assessment. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rex J. Massey and Carole L Popoff, Reno, Nevada, Bureau of Business and Economic Research, University of Nevada, 1990.

Health Plan of Nevada Senior Dimension Membership Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

Vehicle Performance Using Oxygenated Fuels. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

Knowledge of Aids, Source of Information and Changes in Behavior: Results of Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1989.

National Finals Rodeo Fan Survey: 1989. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

Transportation Survey. Maglev Train. Las Vegas, Nevada· Center for Business and Economic Research, UNLV, with Tom Carroll, 1990.

A Feasibility Study for a Law School in Nevada. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Mo Reshig, 1990.

A Study of Boulder City's Residents' Opinions About the Attributes of their Community with an Emphasis on the City's Future Economic Base. Las Vegas, Nevada· Center for Business and Economic Research, UNLV, 1990.

Awareness and Use of Health Care Insurance and Health Care Facilities in Southern Nevada: The Findings of a Telephone Survey Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

Sierra Health Services Membership Survey. Las Vegas, Nevada· Center for Business and Economic Research, UNLV, 1990.

The Impact of a Water-Imposed Interruption to Growth in the Las Vegas Valley. Las Vegas, Nevada· UNLV, with Tom M. Carroll and William T. White, William T. White Associates, and Tom M Carroll, 1990

Visitor Transportation Survey: Estimating the Demand for High-Tech Maglev Train Service. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Tom Carroll, 1990.

Vision Care. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

Pet Owners' and Veterinarians' Feelings About Health Care Plan Issues Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, 1990

A Study of Green Valley Residents' Opinions About the Attributes of Their Community. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Annette Coats, 1990

Community Health Care. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

"An Approach to Forecasting Office Space Demand," Las Vegas Metropolitan Professional Office Market Review, (February 1, 1990), pp.9-12.

Market and Location Analysis for the Las Vegas Chapter of the American Red Cross Las Vegas, Nevada: Center for Business and Economic Research, UNLV, April, 1988.

Economic Impact and Viability of an Additional Certified Moving and Storage Company in Southern Nevada. Las Vegas, Nevada Center for Business and Economic Research, UNLV, January, 1988.

An Economic Impact Study of a Rural Nevada Air Base Las Vegas, Nevada Center for Business and Economic Research, UNLV, 1988.

Gaming Activities and Attitudes of Henderson Residents Las Vegas, Nevada Center for Business and Economic Research, UNLV, 1988.

The Market for Long Distance Telephone Service in Las Vegas Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

Economic Impact of the Deactivation of the 474th at Nellis Air Force Base. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

Nevada's Economic Outlook: Projections and Forecasts to the Year 2010. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

Analysis of the Fiscal Impacts of the Proposed Superconducting Supercollider in Urban Southern Nevada Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Tom Carroll and Tom Schwarz, May, 1987.

A Survey of Telephone Directory Usage Las Vegas, Nevada: Center for Business and Economic Research, UNLV March, 1987.

Business Hiring Practices in Las Vegas. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, March, 1987.

A Survey of Newspaper Readership in Las Vegas Las Vegas, Nevada: Center for Business and Economic Research, UNLV, February, 1987.

Airline Marketing Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1987.

Nevada Job Training Program Participant Follow-Up Survey, annual, 1987 to 1990. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1987.

Land Use Study of the Madison School Property Las Vegas, Nevada: Center for Business and Economic Research, UNLV, October, 1986.

Attitudes and Opinions Toward Mental Health Care Facilities and Services A Survey of Las Vegas. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, September, 1986.

The Economic Impact of An Additional Automotive Dealership· The Case of a Proposed American Motors Dealership in Las Vegas. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, February, 1986.

An Investment Analysis of the Proposed Brennan Motel-Apartment Complex Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1986.

An Energy Policy Model for Vermont. Montpelier, Vermont: Vermont Energy Office, 1980.

Vermont State Energy Policy and Economic Well-Being. Montpelier, Vermont: Vermont Energy Office, 1980.

A Statistical and Computer Model for Estimating Waterfowl Kill, 1969. (An unpublished report for the U.S. Migratory Bird Population Station.)

Wyoming's Commercial and Industrial Water Use and Requirements. Laramie, Wyoming: University of Wyoming, 1967.

Residential Water Usage In Wyoming. Laramie Wyoming: University of Wyoming, 1967.

A Survey of the Municipal Water and Sewage Systems In Wyoming Laramie, Wyoming University of Wyoming, 1967.

iii. Other Publications

"Why Our Multipliers Don't Total the Same as Other Regions (But Could Some Day)" Las Vegas Business Press, August 1993.

"Business Indicators and Analysis," Nevada Business Journal, 1990 to date.

"The Economic Outlook for Nevada: 1993," State of Nevada Comprehensive Annual Financial Report, pp. xviii-xxi, 1993.

"The Economic Outlook for Nevada: 1991," State of Nevada Comprehensive Annual Financial Report, pp, xiii-xvii, 1991.

"Wyoming's Trona Industry: Its Economic Significance," Wyoming Trade Winds (September-December, 1967, pp. 21-39).

6. RESEARCH, SCHOLARLY OR CREATIVE EFFORT IN PROGRESS

"Multiplier Comparisons of Alternative Implan and REMI Model Versions: Illuminating Black Boxes," submitted to Environment and Planning A.

"A Comparison of the Multipliers of Implan, REMI and RIMS II: Benchmarking Ready-Made Modes for Comparison," submitted to the Annals of Regional Science.

"The Issue of Region Definition in Ready-Made Regional Economic Impact Models· The Case of the REMI Model and Clark County, Nevada," submitted to the Economic Systems Research· Journal of the International Input-Output Association.

Black Immigrants in the U.S. Labor Market: An Earnings Analysis," submitted to The Review of Black Political Economy.

"Symbolic Product Attributes and Emulatory Consumption: The Case of Rodeo Fan Attendance and the Wearing of Western Clothing," submitted to the Journal of Economic Issues.

7. SUMMARY OF INSTITUTIONAL COMMITTEE OR BOARD ASSIGNMENTS:

Department of Economics, Search Committee, 1987 to date.

College of Business and Economics, Research Committee, since 1986.

Academic Board, Committee on Standings and Degrees, and various ad hoc committees (Norwich University, 1974 - 1985).

Vermont State Colleges, Office of External Programs, 1985-1986 Evaluator of external degree programs in banking and business.

8. SUMMARY OF OTHER ASSIGNED INSTITUTIONAL DUTIES

i. Obtaining Grant Monies

Numerous grants totalling approximately $2 million dollars.

ii. Center Publications

Economic Indicator, 1986 to date.

Quarterly Housing Market Conditions, 1986 to date.

"Projects Buoy Southern Nevada's Economy," Vol. 11, 1st Quarter, 1993.
"Seeding Economic Expansion," Vol. 10, 2nd Quarter, 1992.
"A Stronger Market," Vol. 10, 3rd Quarter, 1992.
"Rekindled Economic Expansion," Vol. 10, 4th Quarter, 1992.
"Confidence Wanes a Notch or Two," Vol. 9, 1st Quarter, 1991.
"The National Recession," Vol. 9, 3rd Quarter, 1991.
"A More Measured Growth Path," Vol. 9, 2nd Quarter, 1991.
"Spurts of Growth: A Time for Cautious Optimism," Vol 9, 4th Quarter, 1991.
"A Slowing Rate of Growth," Vol. 8, 4th Quarter, 1990.
"Continued Growth-But...", Vol. 8, 3rd Quarter, 1990.
"Increased Numbers of People," Vol. 8, 2nd Quarter, 1990.
"Balanced Market Conditions," Vol. 8, 1st Quarter, 1990.
"They're Moving Dirt, Lots of It," Vol 6, 4th Quarter, 1988
"Housing Demand Increases," Vol. 7, 4th Quarter, 1989.

Professional Office Market Review

"Meeting the Demands of the Las Vegas Office Market," with Blair Lund and Frank Nason, February 1, 1991.
"The Expanding Las Vegas Office Market," February 1, 1990.

9. SUMMARY OF PUBLIC SERVICE ACTIVITIES

i. Community Data and Information Reports (Primary Investigator)

Customer Satisfaction Survey Data Report. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, June 1993.

Southern Nevada Wage and Benefit Study: 1992. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, April 1993.

Henderson Business Directory. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, January 1993.

Henderson Business Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, January 1993.

Historical Perspective of Southern Nevada 1970-1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Joe Becker, Spring 1993.

Henderson Community Profile (Statistical Summary). Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, July 1992.

Henderson Community Profile. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, July 1992.

A Study of Green Valley Residents' Opinion about the Attributes of Their Community. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Rennae Daneshvary, May 1992.

Economic and Business Profile: Hazelnuts and Food Products. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, March 1992.

Condominium Market Profile: Las Vegas Metro Area. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, December 1991.

Foster Care Independent Living Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, December 1991.

Migration Statistics; Drivers License Count Clark County. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, December 1991.

Las Vegas Housing Market Statistical Summary Compiled Data 1985-1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, December 1991.

Annual Job Training Report: 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Tina Bejrananda, December 1991.

Lincoln County Directory: 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, November 1991.

Generation Plant Construction Economic Impacts. Ten Scenarios for Nevada Power Company. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Tom M. Carroll, May 1991.

Operating Engineers Local 501 Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Mohammed Risheg, April 1991.

Southern Nevada Wage and Benefit Study 1990. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1991.

Las Vegas Metropolitan Housing Market Conditions. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, Quarterly publication.

Southern Nevada Wage & Benefit Study: 1991. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, September, 1990.

Retail Trade Profile for Las Vegas: A Digest of Some Selected Market Facts. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Diane Tamadonafor, 1990.

Rebel Athletic Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.
Rebel Media Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1990.

Residential, Commercial, and Transportation Facilities in Rural Southern Nevada. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1989.

Non-Smoker's Rights. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Mo Reshig, 1990.

Las Vegas Metropolitan Factbook. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

Las Vegas Economic/Business Profiles/Prospects: A Baseline Study. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1989.

Thomas and Mack Market Profile Report. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1989.

The Real Estate Development Outlook for Las Vegas, Nevada. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

Las Vegas Housing Market Conditions, Quarterly Publication (1986 to present). Las Vegas, Nevada: Center for Business and Economic Research, 1988.

Las Vegas Perspective Survey: 1988. Las Vegas, Nevada: Center for Business and Economic Research: UNLV, 1988.

A Casino Showroom Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

Housing Marketing Trends and Current Conditions in Las Vegas. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1988.

An Economic Development Profile of Las Vegas for Financial Facilities Planning. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, Las Vegas, 1988.

Marketing Effectiveness of a Coupon Book Promotion for the Continental Hotel. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, January, 1987.

Las Vegas Business Directory. 1987 and 1990 issues, Las Vegas, Nevada: Center for Business and Economic Research, UNLV.

American Nevada's Green Valley Real Estate Surveys. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, with Jack Hart, 1987.

A Casino Showroom Survey. Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1987.

Las Vegas Perspective Survey. Annual issues from 1986 to 1990, Las Vegas, Nevada: Center for Business and Economic Research, UNLV, 1987.

Appliance Usage: A Survey of Las Vegas Apartment Complexes. Las Vegas, Nevada: Center of Business and Economic Research, UNLV, August, 1986.

ii. Interviews and Speeches (Since July, 1989)

Television Interviews: 45 interviews (including national networks such as ABC and CNN).

Radio Interviews: 14 interviews (including national public radio, NPR)

Magazine and Newspaper Interviews: 69 interviews (including Wall Street Journal, Barron's, The Economist, The New York Times, and The Los Angeles Times).

Speeches: 57 speeches (including national conventions, since 1989).

Speeches: 1992-1993

"Effects of Clintonomics on the Las Vegas Economy," a speech presented to the Commercial Marketing Group, Las Vegas, NV, March 11, 1993.

"Las Vegas Economic Conditions," a speech presented to the CPA Club of Las Vegas, Las Vegas, NV, March 31, 1993.

"An Overview of the Economy," a speech presented to the Americana Commercial Group, Las Vegas, NV, January 28, 1993.

"The Outlook for Nevada's Economy," State-by-State Report, Business Outlook Roundtable, Center for the New West, Panel Member, Denver, CO, January 14, 1993.

"Las Vegas Economy," a speech presented to the Las Vegas Optimist, Club, April 30, 1992.

"Las Vegas Economy," a speech presented to the Kiwanis Green Valley, April 20, 1992.

"Economic Outlook," a speech presented to the National Property Management Association, Las Vegas, NV, May 21, 1992.

"Presenting Models to Clients," a speech presented to REMI Users Conference, Las Vegas, NV, October 13, 1992.

"Las Vegas Economy," a speech presented to the Las Vegas Civitan Club, Las Vegas, NV, October 30, 1992.

"Economic Outlook for Las Vegas and the United States," a speech presented to the Beta Alpha Psi Professional Seminar, Las Vegas, NV, December 9, 1992.

"Southern Nevada Trends," a speech presented to an ICSC Meeting, April 28, 1992.

"Health Care Coverage in Nevada," a speech presented to the Western Region Marketing of AARP, Las Vegas, NV, July 30, 1992.

"New Economic Development," a speech presented to the National Association of Development Organization, Las Vegas, NV, September 19, 1992.

"Business Research," Las Vegas Chamber of Commerce, Panelist, Las Vegas, NV, August 11, 1992.

"Economy and Gaming," Leadership Las Vegas, Panel Member, Las Vegas, NV, December 11, 1992.

"Business Plan for 1993 and Beyond," Commercial Marketing Group, Panel Member, Las Vegas, NV, November 30, 1992.

"The Economy and Impacts to Financial Institutions," a speech presented to the Bank Administration Institute, Las Vegas, NV, November 18, 1992.

iii. Public and Professional Committee Memberships and Affiliations

Board of Directors, Clark County Red Cross, 1993.
Citizen's Advisory Committee, Clark County Regional Transportation, since 1987.
Southern Nevada Area Population Projections and Estimation Committee, since 1986.
Overall Economic Development Committee, Clark County, Nevada, since 1986-1992.
Metropolitan Research Associates, since 1986.
Planning Council, United Way, since 1992.
Vermont Occupational Information Coordinating Committee, 1977-1982.
Served as committee member and completed a survey of the sources and uses of Occupational information in Vermont.
U.S. Senate Productivity Award Review Committee, since 1988.
Blue Chip Enterprise Initiative, Nevada Judge, since 1989.
U.S. Department of Commerce State Initiative, Nevada host, 1992.
Nevada League of Cities Award Committee Member, 1992.
Board of Directors, Association for University Business and Economic Research, 1993 to 1995.
Contributing Editor, Nevada Business Journal, since 1988.
Economic Development Commission Strategic Planning Group, Spring 1992.
Editorial Advisory Board, Nevada Review of Business and Economics, since 1990.
Associate Editor, Nevada Review of Business and Economics, since 1990.
Panelist, Western Blue Chip Forecast, since 1986.
Board of Directors, Northeastern Business and Economic Association, 1985.
Editorial Board, New England Journal of Employment and Training, (1981-1984).

iv. Testimony

Colorado Gaming Commission, 1993

Colorado Gaming
Nevada Legislature, 1993
Taxicab Industry Market Condition
Nevada Legislature, 1992
Health Care
Nye County Commission, 1992
Survey Research
Lionel, Sawyer & Collins, 1992
Survey Research
Hogan & Hartson, 1991
Demography of Southern Nevada
Fred Kennedy, 1991
Economy of Southern Nevada
Nevada's Blue Ribbon Commission on the Legislative Process, 1988
Economic Projections and Forecasts for Nevada
Burgess and Normand, 1977
Value of life
Otterman and Otterman, 1983
Value of life

v. Consulting

William T. White Associates, 1992
Economic Impact of Water Shortages
Bombardier Corporation, 1981
Completed a study of compensation packages for skilled, semi-skilled, and professional occupation titles for the Central Vermont labor market.
Vermont Attorney General's Office, 1980-1981
Consultant for the State of Vermont on the economic feasibility of a proposed 150 megawatt wood-fired electric generating plant.
Vermont Banker's Association, 1978
Economic Outlook
Vermont Energy Office, 1979-1980
Completed studies entitled State Energy Policy and Economic Well-being and An Energy Policy Model of Vermont. Represented the Vermont Energy Office at meetings of the New England Regional Commission and consultant to the staff of the Vermont Energy Office.

vi. Conference Facilitator

Business Roundtable (in coordination with the southern Nevada Banking community), hosted one day conference on future economic conditions and risk management, 1990.

Vermont Residential Conservation Corporation, May 18, 1980. Presented a one day training conference on evaluation of energy-saving residential.

University of Vermont, College of Agriculture, Energy and Jobs Conference, August 18, 1980. Conference facilitator. Presented a paper entitled "The Future of Energy and Jobs in Vermont: The Paucity of Econometric Findings."

10. OTHER PROFESSIONAL ACTIVITIES, HONORS, AND AWARDS

i. Scholarships and Fellowships

Oklahoma Gas and Electric Scholarship
General Electric Fellowship
National Association of Mutual Savings Banks

ii. Memberships in Professional Organization

Association of University Business and Economic Research
American Economic Association
Western Economics Association
Western Regional Science Association
Western Social Science Association

The Downtown Las Vegas Visitor: 1993

Prepared for

Downtown Progress Association

Prepared by

R. Keith Schwer, PhD, Director
Rennae Daneshvary, PhD, Assistant Director

December 3, 1993

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I. Introduction

The Downtown Progress Authority commissioned the Center for Business and Economic Research (CBER) at the University of Nevada, Las Vegas, to conduct a survey which addressed activities of visitors while in Las Vegas and Downtown Las Vegas. The specific objectives of the study were to reveal visitors' reasons for visiting Las Vegas, the nature of their travel and lodging arrangements, the types of activities they engage in while in Las Vegas, their interest in the Fremont Street Experience, and their overall evaluation of Las Vegas. To a lesser degree, the study sought to keep abreast of southern Nevadans' interest in and evaluation of the Downtown gaming environs. The effectiveness of various advertising media in affecting hotel/casino visitation was also addressed. In addition, demographic information was solicited. A brief comparison between the findings of this study and that of a 1990 study conducted for the Downtown Progress Association will also be made. A copy of the questionnaire and summary statistics are provided in Appendix A and Appendix B, respectively.

To investigate the objectives, interview sites were set up at five downtown casinos: the Four Queens, Fitzgeralds, Binions, the Golden Nugget, and the Las Vegas Club on five different days (four-hour periods) during September 1993 [1] To attract participants, the video, the *Fremont Street Experience*, was featured and souvenirs

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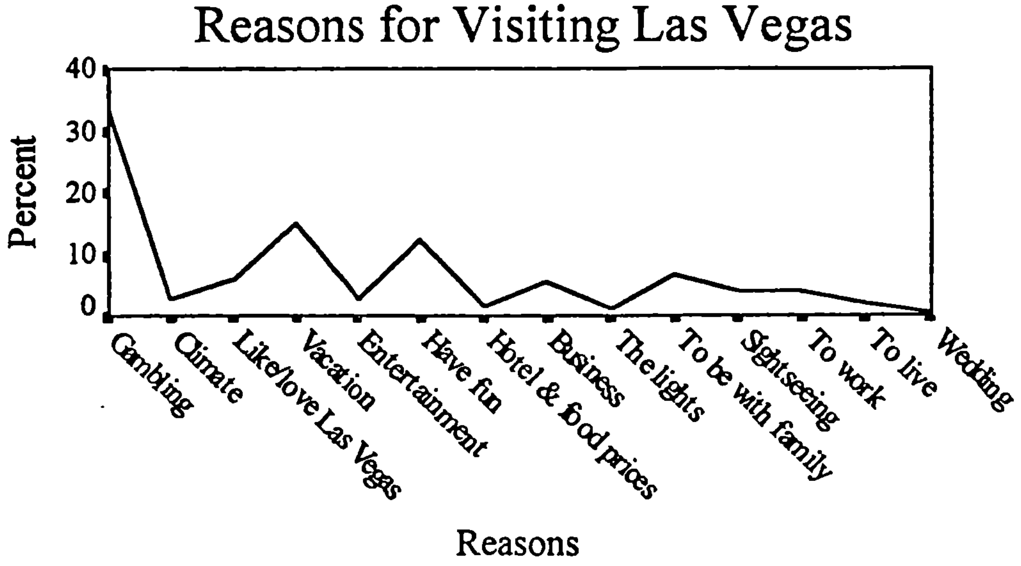
[1] The selection of alternative dates, times, and locations (although not randomly selected), provided sufficient variability so as to survey the breadth of the Downtown market. Moreover, this systematic sampling design avoided bias that might have occurred with a simpler and less varied design.

such as cards, pens, and key chains were offered. Questionnaires were completed by 584 people, of which 105 were local residents. Of the nonresidents, 460 were in Las Vegas for a vacation, a convention or business. The majority of which, however, were on vacation (90.7 percent).

II. Reasons for Visiting Las Vegas

To determine what attracts people to Las Vegas, respondents were asked to provide the *one* most important reason for their decision to visit. A summary of the reasons is provided in Figure 1. Of the 13 reasons provided by respondents, the three mentioned most were gambling (33.5 percent), vacationing (15.2 percent), and having fun (10.6 percent).

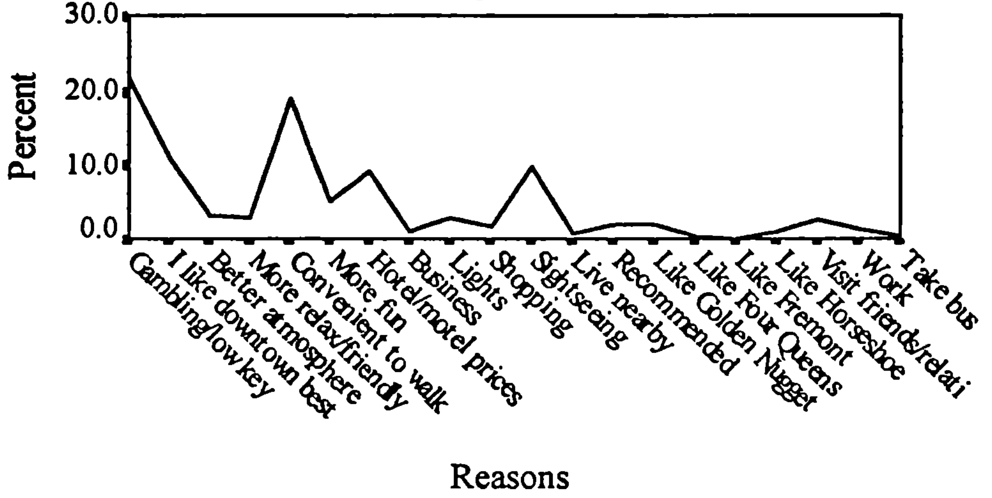
Figure 1



Respondents were also asked to provide the *one* most important reason for their decision to visit Downtown Las Vegas. The responses are graphically presented in Figure 2. Among the 20 reported reasons, gaming (low key and cheaper) was the most popular, mentioned by 22 percent of the respondents, followed by convenient to walk around, 19 percent of the respondents. An almost equal percentage of respondents mentioned "I like downtown best" (11.3 percent) and "sightseeing" (10 percent) as *the* reason for visiting the Downtown District.

Figure 2

Reasons for Visiting Downtown Las Vegas



In summary, respondents provided various reasons for visiting Las Vegas and Downtown Las Vegas. However, gaming appears to be the most popular reason. In fact, gaming may be a more significant factor in respondents' decision-making process than what the percentages reveal. Responses such as "I like the Golden Nugget," "to have fun," and "I like/love Las Vegas" may also be linked to the gaming opportunities available in Las Vegas. On the other hand, the responses, "convenient to walk around" and "sightseeing," received sufficient mention to point to the importance of nongaming activities which comprise the breadth of experiences visitors seek.

III. Lodging and Travel Arrangements

This section discusses respondents' travel arrangements, their lodging while in Las Vegas, important hotel/motel features influencing their lodging choice, and transportation arrangements during their stay.

Over one-half of the visitors made their travel arrangements themselves and 32.3 percent used a travel agent. The arrangements for the remaining 11.4 percent of the visitors were made via a tour (9 0 percent), a convention (1.8 percent), or some other means (6 percent). Only 22.5 percent of the visitors purchased a package deal for their Las Vegas trip.

On average, visitors plan to spend about five nights in Las Vegas.[2] The average lodging expenditures per night was $54.42 with a range of $10 to $300. Over one-half of the visitors usually stay Downtown when they visit Las Vegas. An additional 36.1 and 11.8 percents, respectively, stay on the Strip or at "other" locations. On this visit, 76 percent of the visitors stayed in a hotel/motel, 12 5 percent

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[2] This higher than average number of visitor nights no doubt reflects, in part, the relatively high percentage of visitors on vacation as compared with earlier studies.

stayed with a friend, and 11.5 percent made "other" arrangements. Table 1 provides a frequency distribution of the hotels/motels visitors were staying at during their visit. As would be expected, the majority of respondents were staying at or close to the hotel interview sites. The three most popular hotels were the Golden Nugget (n=32), Fitzgeralds (n=24), and the Four Queens (n=20). The Excalibur (n=13), the Flamingo Hilton (n=11), and the Imperial Palace (n=10) were the most popular Strip hotels. Lodging other than hotels/motels included apartments (n=16), relatives (n=9), and RVs (n=4). Clearly, Downtown visitors lodged at a wide cross section of locations.

Important Lodging Features

Lodging features important to visitors during their stay in Las Vegas were also investigated. Fifteen factors were presented to the respondents and they were asked to rate the importance of each. Table 2 shows the results. Notice that over one-half of the respondents rated nine of the 15 features as somewhat to very important. However, hotel location, walking convenience to other casinos, hotel security, casino, and hotel pricing were the five highest rated features (65.7, 64.6, 60 5, 58.7, and 54.9 percents, respectively). The three features rated the least important were health spa, tennis, and golf.

Transportation

Three questions were asked in respect to respondents' use of transportation while in Las Vegas. The first one asked respondents how they got Downtown, if they were not staying there. The most popular means of transportation was a bus (31 percent), followed by a private car (23.3 percent) and a rental car (21.7 percent).

Table 1
Percentage Distribution of Visitors' Hotel/Casino

	Hotel/motel staying	
	Count	%
California	9	3.2%
El Cortez	2	.7%
Fitzgeralds	24	8.6%
Four Queens	20	7.2%
Fremont	6	2.2%
Golden Gate	7	2.5%
Golden Nugget	32	11.5%
Binion's Horseshoe	6	2.2%
Lady Luck	16	5.8%
Las Vegas Club	14	5.0%
Union Plaza	19	6.8%
Circus Circus	7	2.5%
Riviera	1	.4%
Stardust	5	1.8%
Frontier	2	.7%
Desert Inn	2	.7%
Sands	3	1.1%
Mirage	3	1.1%
Harrah's	4	1.4%
Imperial Palace	10	3.6%
Flamingo Hilton	11	4.0%
Caesars	1	.4%
Sahara	6	2.2%
Gold Coast	1	.4%
Maxim	8	2.9%
Bally's	4	1.4%
Aladdin	2	.7%
Tropicana	6	2.2%
Excalibur	13	4.7%
Showboat	1	.4%
Gold Spike	3	1.1%
Rio	3	1.1%
Day's Inn	3	1.1%
Westward Ho	4	1.4%
Hilton	2	.7%
Ambassador	2	.7%
Rainbow Vegas	2	.7%
Lucky Motel	2	.7%
Daisy Motel	2	.7%
Stateline	2	.7%
Others	8	2.9%
Total	278	100.0%

Table 2
Rating of Important Lodging Features

	very important		somewhat important		not important		not applicable	
	Count	%	Count	%	Count	%	Count	%
Recommendations from friends	190	39.7%	130	27.1%	97	20.3%	62	12.9%
Recommendations from travel agents	103	22.9%	129	28.7%	120	26.7%	98	21.8%
Shopping	99	21.4%	114	24.7%	166	35.9%	83	18.0%
Pool	114	24.9%	128	27.9%	138	30.1%	78	17.0%
Health spa	69	15.5%	68	15.3%	210	47.3%	97	21.8%
Advertisement	79	18.2%	97	22.3%	165	37.9%	94	21.6%
Hotel pricing	258	54.9%	130	27.7%	44	9.4%	38	8.1%
Hotel security	283	60.5%	115	24.6%	33	7.1%	37	7.9%
Hotel location	306	65.7%	105	22.5%	27	5.8%	28	6.0%
Walking convenience to other casinos	314	64.6%	104	21.4%	38	7.8%	30	6.2%
Golf	44	10.1%	37	8.5%	196	44.9%	160	36.6%
Tennis	40	9.3%	33	7.7%	195	45.5%	161	37.5%
Family entertainment in the hotel	91	20.4%	103	23.0%	147	32.9%	106	23.7%
Numerous restaurants in the hotel	135	29.1%	174	37.5%	99	21.3%	56	12.1%
Casino	284	58.7%	114	23.6%	57	11.8%	29	6.0%

Fewer respondents, 11.9 percent employed a taxi. The remaining 12.1 percent used other means of transportation. With over 40 percent of visitors getting Downtown using some form of public transportation (bus or taxi), their visit assessment depends on these service providers.

The two other questions were hypothetical. Would respondents use a free express bus from the airport to Downtown, and from the Strip to Downtown. Seventy-five percent of the respondents said yes to the former and 85.7 said yes to the latter. Again, visitors find public transportation a means to get Downtown. This reflects not only the availability and ease of getting transportation, but also to a degree their acceptance of buses and taxis for travel.

IV. Activities

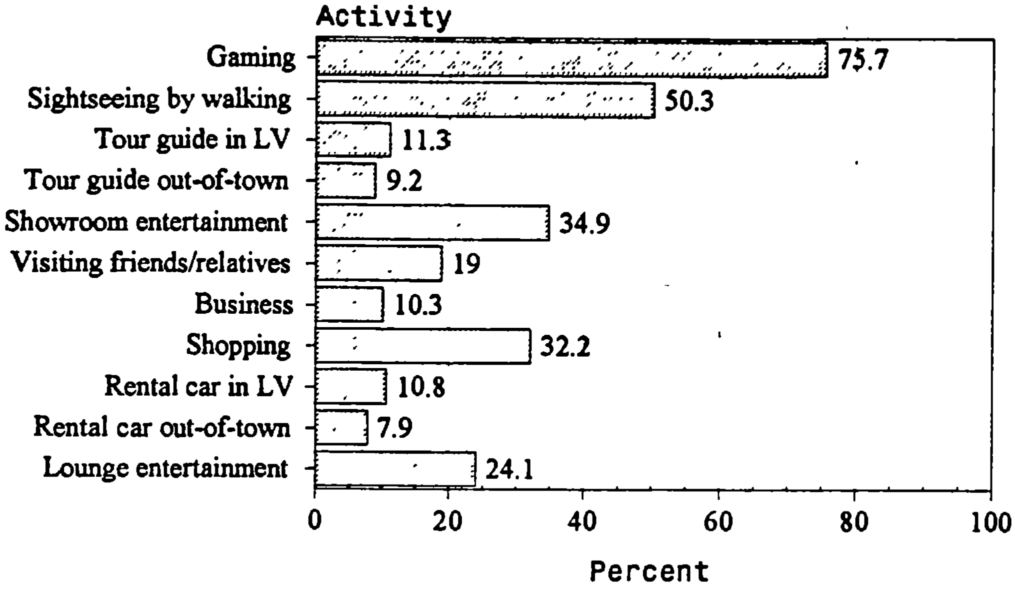
Another important purpose of this study was to gather some information about the types of activities that visitors engage in while visiting Las Vegas. Respondents were asked a series of questions about general activities, gaming activities, and shopping activities.

General Activities

Figure 3 presents a summary of the types of general activities that visitors were engaged in during their Las Vegas trip. By far, gaming was the most popular activity, followed by sightseeing by walking. Sightseeing out-of-town with a rental car was the least participated in activity. The developing Fremont Experience Attraction offers visitors further opportunities to sightsee by walking. Efforts to make the Downtown environment more conducive to walking, for example, a screen from the summer's intense heat, should meet with visitor interests. Also, shopping opportunities, as envisioned in the Fremont Experience meet with visitor interests.

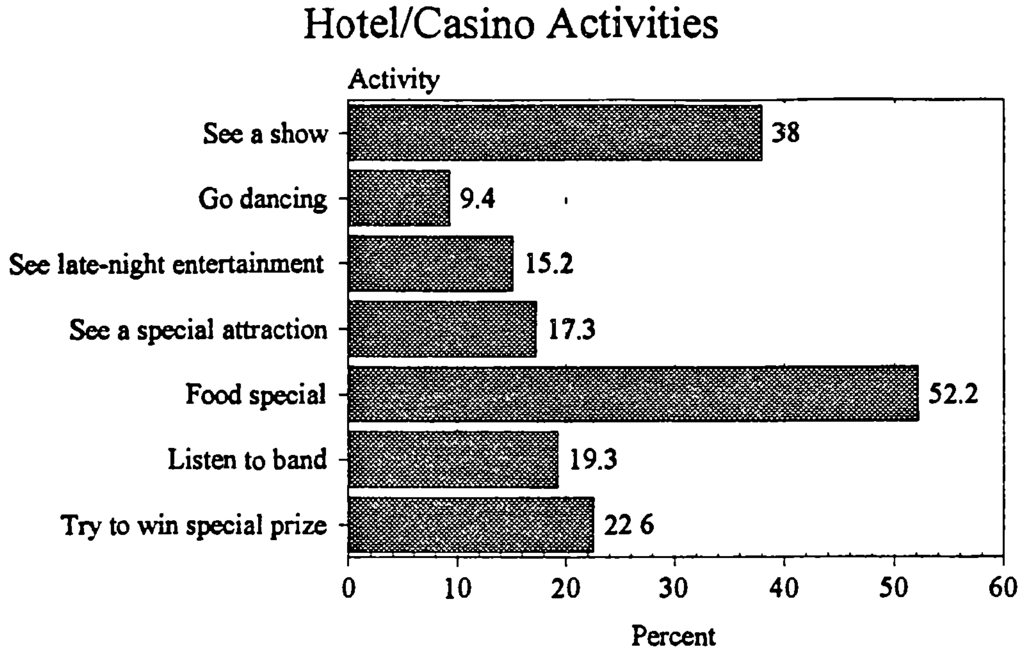
Figure 3

Activities Engaged in During LV Trip



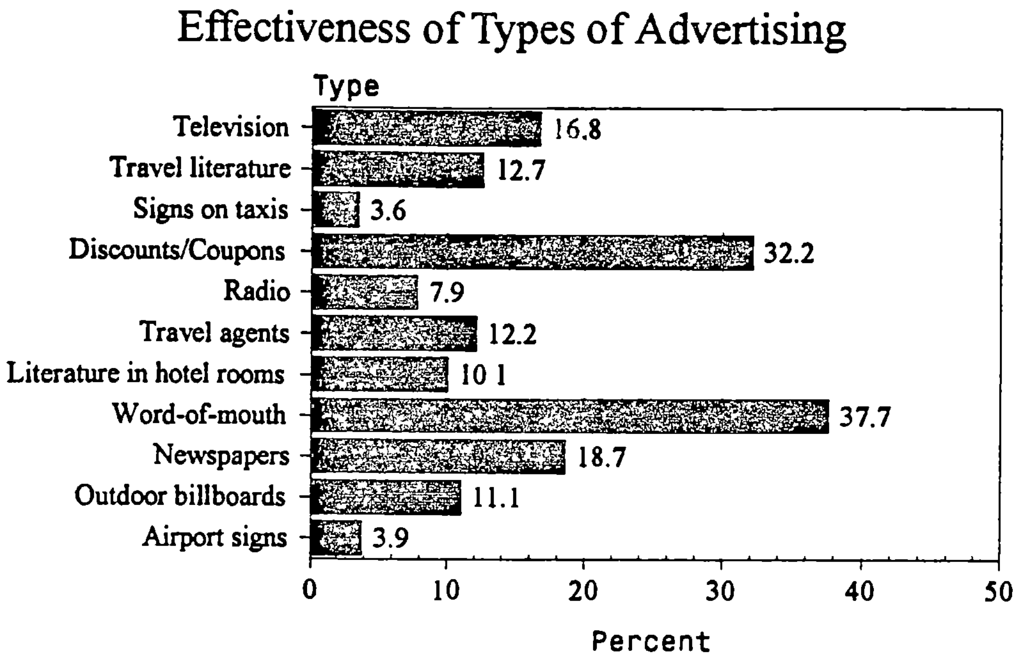
Respondents were then asked if they had visited a specific hotel/casino for any of the following reasons: to see a show, to go dancing, to see late-night entertainment, to see a special attraction, to take advantage of a food special, to listen to a band, or to try to win a "special prize." The results are presented in Figure 4. Note that the most popular hotel/casino attraction was the food special (52.2 percent). Only 9.4 percent of the respondents visited a specific hotel/casino to go dancing. Thus, one might conclude that eating is the favorite nongaming activity of Downtown visitors.

Figure 4



In addition, a separate question was asked to determine the effectiveness of various types of advertising on hotel/casino visitation Respondents were asked to check any of 11 types of advertising which contributed to a hotel/casino visit. As shown in Figure 5, word-of-mouth advertising was the most effective (37.7 percent), followed by discounts/coupons (32 2 percent). In general, however, it appears that advertising did not contribute significantly to hotel/casino visitation.

Figure 5



Gaming Activities

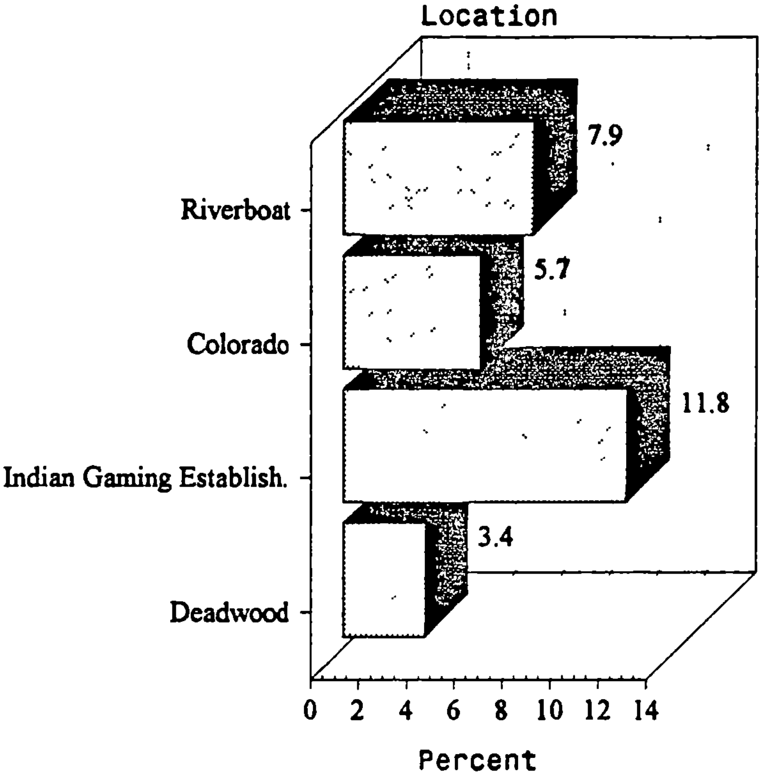
Respondents' gaming activity was another important area of study. First respondents were asked how much time they planned to allocate to gambling On average, they planned to spend about 23 hours gambling during their visit. In addition, they were asked questions about their gaming activities within the border casino areas on their way to Las Vegas Less than one-third of the respondents had stopped at a border casino. Eighty-eight respondents had visited Laughlin, 55 had visited Stateline or Jean (I-15), and 11 had visited Mesquite They had stayed an average of 2.6, 2.3, and 1 7 nights at Laughlin, Stateline, and Mesquite, respectively. Within the past five years, these casino border visitors had visited Laughlin an average of 3.1 times. And, 80 respondents had visited Laughlin instead of Downtown Las Vegas in the past five years. When asked the reason for their preference, the two most mentioned responses were "for a change" (n=19) and "for sightseeing" (n=14).

To further investigate respondents' gaming activities, they were asked which of the locations they had played at (other than Nevada or New Jersey) within the past five years: a riverboat, Colorado, an Indian Gaming Establishment, or Deadwood. Results are provided in Figure 6. Note that only a small percentage of respondents had gaming experience at these locations. When asked to specify other locations where they had had gaming experience, 19 were mentioned with the Bahamas the most frequent response (n=7).

For *first-time* visitors to Las Vegas, 29.3 percent indicated that this other gaming experience influenced their decision to visit Las Vegas. The corresponding figure for *repeat* visitors was significantly higher, 51.9 percent When asked, in what way, 51 respondents replied because Las Vegas is better, 39 said that they like to gamble, 12 said it's fun in Las Vegas, and 3 said that they had moved to Las Vegas.

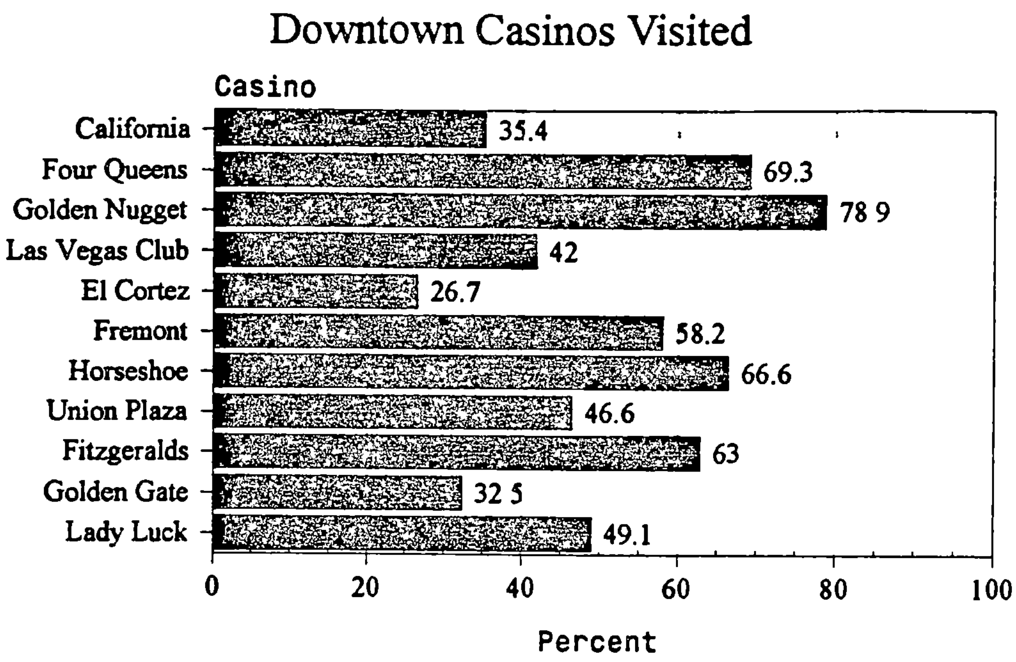
Figure 6

Location of Respondents' Gaming Experience



Next respondents were questioned about their Downtown Las Vegas gaming experience. From a list of 11 casinos they were asked to check all that they had visited. As shown in Figure 7, at least 58 percent of the respondents had visited five of the Downtown casinos. The Golden Nugget was the most-visited casino (78 9 percent), followed by the Four Queens (69 3 percent). The least-visited casino was El Cortez (26.7 percent).

Figure 7



Shopping Activities

Finally, in a series of questions, respondents were asked if they planned to shop, and if yes, for whom were they going to shop and how much were they planning to spend. In addition, they were asked their preference of specialty shops for the Downtown area. Approximately 59 percent of the respondents planned to shop during their visit and spend, on average, about $305. Over one-half of the respondents planned to spend $100 or less, an additional 25 8, 14.3 and 5.3 percents estimated $120 to $450, $500 to $1,000, and $1,100 to $3,300, respectively. About 33, 30, 22, and 19 percents of the respondents planned to buy gifts for themselves, their children/grandchildren, their spouse/fiance/companion, and casual friends, respectively. The most preferred type of specialty shop was "unique gifts" (albeit, the percentage was relatively low, 31.7).

V. The Fremont Street Experience

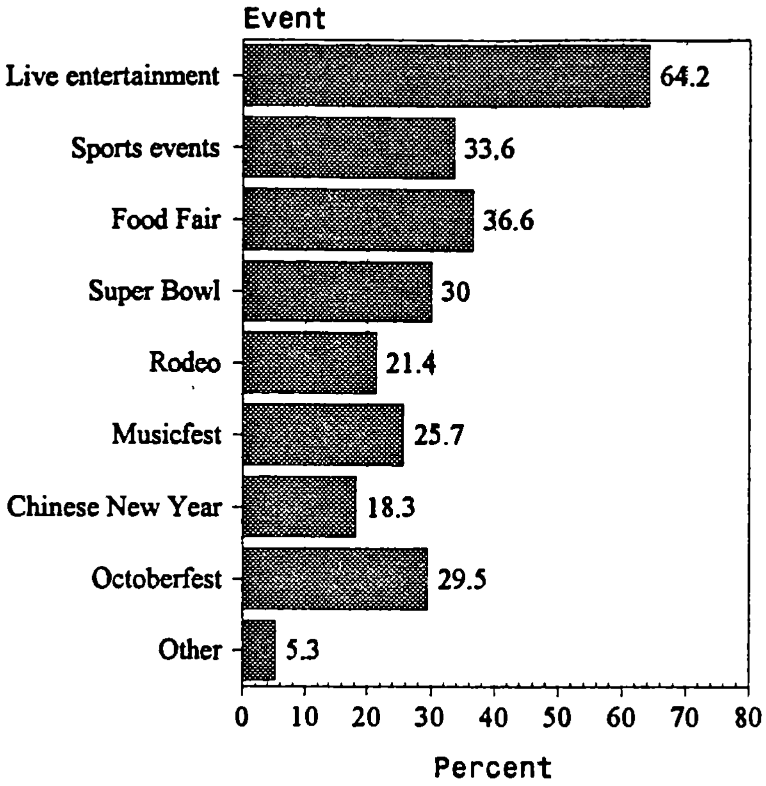
Prior to asking questions related to the respondents' interest in the Fremont Street Experience, they were given a synopsis that read:

> "Hotel/casinos and City officials recognize the need to revitalize Downtown. The new development known as the Fremont Street Experience includes a spectacular reflective light canopy covering four blocks of Fremont Street with sparkling shade by day and a pulsating star field of light by night Suspended from this 'Celestial Vault' will be the 'Sky Parade'- illuminated floats which will sweep through the night sky accompanied by light effects, music, lasers, and pyrotechnics. A five-block pedestrian mall beneath the canopy will feature a lively schedule of special events, live entertainment, and specialty shopping. A new parking structure which features exciting shopping venues round out the experience."

Then respondents were asked if they would come back after January 1995 to see the Fremont Street Experience attraction and what types of special events they'd be interested in. An overwhelming majority of the respondents, 91.3 percent, would return. In response to the second question, respondents expressed a wide range of interest in the types of special events which could be featured. As shown in Figure 8, the event in which they expressed the most interest was live entertainment (64.2 percent), followed by a food fair (36.6 percent) The Chinese New Year elicited the least interest (18.3 percent).

Figure 8

Respondents' Interest in Special Events



VI. Respondents' Evaluation of Las Vegas

To investigate respondents' satisfaction with their trip they were asked to rate their *overall* experience in Las Vegas and in Downtown Las Vegas. Approximately 89 percent of the respondents were satisfied/very satisfied with their Las Vegas experience. The corresponding percentage for the Downtown experience was 83.9. Additionally, respondents were asked to list what they liked the *best* and the *least* about Downtown Las Vegas (Casino Center). For a summary refer to Tables 3 and 4

Table 3
Features Liked Best about Downtown Las Vegas

	Like best about Downtown	
	Count	%
Everything is close - all casinos	179	40.9%
Atmosphere/exciting/ friendly	48	11.0%
Lower minimum bet	17	3.9%
Lights	73	16.7%
Everything	20	4.6%
Food	16	3.7%
Better payoffs	11	2.5%
Fun	8	1.8%
People	14	3.2%
Clean, safe, nice	6	1.4%
Single deck 21	2	.5%
Gambling	11	2.5%
Four Queens	10	2.3%
Nugget	6	1.4%
Binion's	6	1.4%
Gold Spike	1	.2%
Fremont	1	.2%
Lady Luck	1	.2%
Fitzgeralds	1	.2%
Women	3	.7%
Union Plaza	2	.5%
Shopping	2	.5%
Total	438	100.0%

Table 4
Features Liked Least about Downtown Las Vegas

	Like least about Downtown	
	Count	%
Bums/panhandlers	57	21.2%
Homeless	16	5.9%
"Charity" workers asking for money	17	6.3%
Dirty streets	24	8.9%
Crime	5	1.9%
Unsafe feeling	10	3.7%
Parking	14	5.2%
Scam artists who pull into their slot casino	14	5.2%
Drinks	2	.7%
Old, outdated	13	4.8%
Can't win	13	4.8%
Crowds	13	4.8%
Traffic	10	3.7%
Bicycle Police	8	3.0%
Rude, unfriendly casino employees	8	3.0%
Need better entertainment	5	1.9%
Smokey	6	2.2%
Noisy	3	1.1%
Too far from Strip	13	4.8%
Fitzgeralds	3	1.1%
Smutty newspaper	5	1.9%
Drug dealer/addicts	2	.7%
Food quality	1	.4%
Need more casinos	4	1.5%
Some casinos dirty	3	1.1%
Total	269	100.0%

The features liked best were "close-all casinos" (40.9 percent), "lights" (16.7 percent), and "atmosphere/exciting/friendly" (11.0 percent). The feature liked least was the "bums/panhandlers" (21.2 percent).

After expressing the best and least liked features of Las Vegas and Downtown, respondents were asked if they planned to visit the areas again, and why or why not. An equal percentage of respondents (about 93) would visit Las Vegas and Downtown Las Vegas again. The most mentioned reason for the return trips was "like it/had fun." Only a few respondents provided reasons for not returning to the area. Thus, Las Vegas is a popular tourist city. In fact, 61.5 percent of the repeat visitors had visited Las Vegas an average of 3.1 times during the last year, while 69.9 percent had visited an average of 12.4 times in the last 10 years.

VII. Demographics

Over one-half (53.4 percent) of the participants were male, 65.8 percent were over 35 years of age, 57 percent were married, and 73.2 percent were white. About 70 percent of the sample had attended college, of which 47.4 percent had a four year degree or more (see Figure 9). Seventy-two percent were employed full time or part time (see Figure 10). And, approximately one-half of the sample's total annual household income was within the $20,000 to $59,999 range (see Figure 11).

Figure 9

Respondents' Level of Education

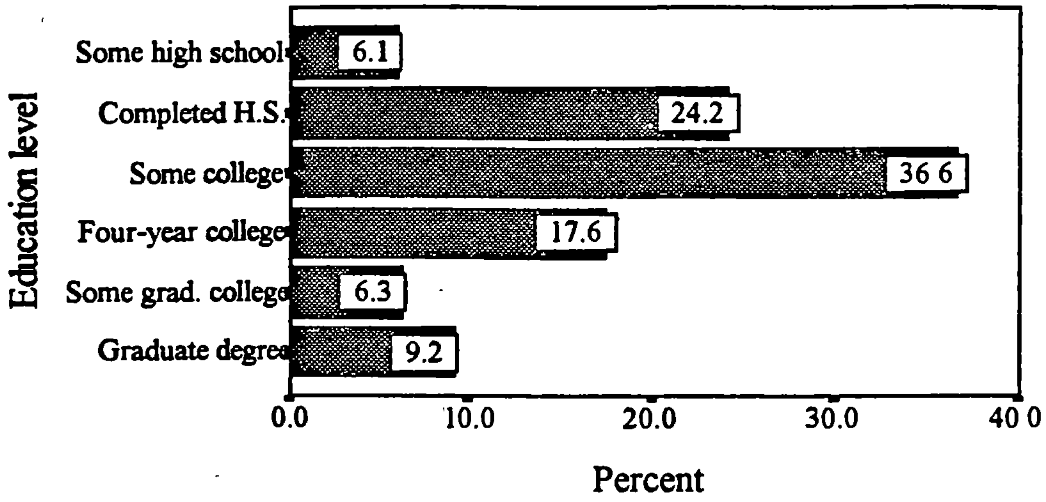


Figure 10

Respondents' Employment Status

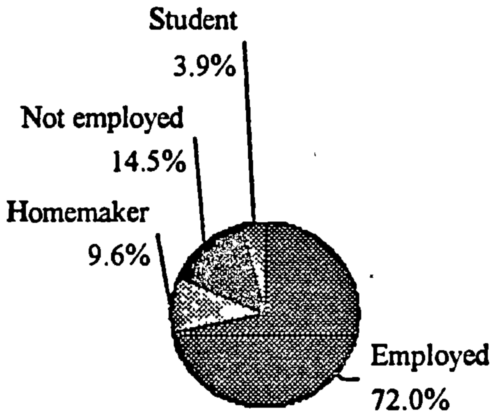
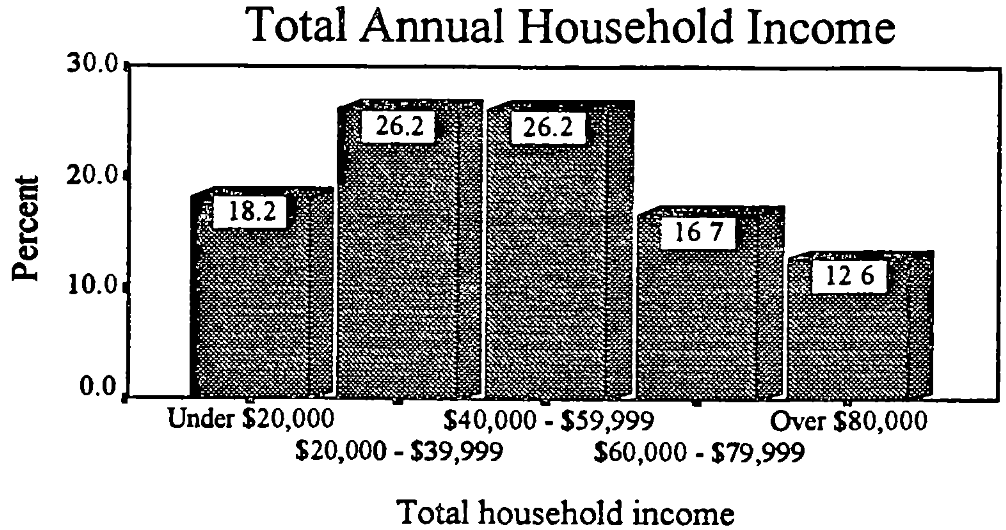


Figure 11

Total Annual Household Income



VIII. Comparison of Key Findings with 1990 Study

In 1990, the CBER conducted a study for the Downtown Gaming Association which addressed the gaming preferences and activities of residents and visitors Four survey designs were created to ensure adequate representation of local residents and visitors· a resident telephone survey, a local intercept survey, a visitor intercept survey, and a local mail survey A few comparisons between the present study and the 1990 study can be made.

The primary purpose for visiting Las Vegas remained the same over the three-year period The majority of visitors came to Las Vegas for a vacation. Likewise, gaming was the most participated in *general* activity during 1990 and 1993 (83.2 percent for the former and 75.7 percent for the latter), whereas, eating was the most popular nongaming casino attraction/activity. Consistent with the 1990 study, the 1993 visitor intercept survey and the resident mail survey showed that the Golden Nugget was the most frequented casino. However, findings from the resident intercept survey showed that the Horseshoe and the Four Queens were the most frequented Downtown casinos.

Few differences existed in the two studies' findings regarding visitors' evaluation of Downtown Las Vegas and of their Las Vegas experience. The closeness of casinos and the presence of "street bums," respectively, were considered the most-liked and least-liked features of the Downtown in both studies. Visitors' rating of their Las Vegas experience was high for both studies. Approximately 86 and 89 percents of the 1990 and 1993 respondents, respectively, were satisfied/very satisfied with their experience. Furthermore, approximately 96 and 93 percents of the 1990 and 1993 respondents, respectively, would return to Las Vegas again. Thus, visitors' perception and evaluation of Downtown Las Vegas have remained relatively constant over the past three years.

IX. Conclusion

Visitors' activities (i e., general, gaming, and shopping) while in Las Vegas was the focus of this report. Respondents' past gaming experience, reasons for visiting Las Vegas, travel arrangements, interest in the Fremont Street Experience, and evaluation of Las Vegas were also examined In addition, the effectiveness of various advertising media in affecting hotel/casino visitation was addressed. Analyses were based on 584 responses.

Overall, respondents have a variety of reasons for visiting Las Vegas and Downtown Las Vegas, but those related to gambling are the most popular. It is also the most participated in activity. Approximately three-fourths of the respondents gambled during their visit. Excluding gambling, a food special was the major reason for a specific hotel/casino visit. The most frequented Downtown casino is the Golden Nugget. From 11 types of advertising, word-of-mouth (37.7 percent) and discounts/coupons (32.3 percent) are the most effective in promoting hotel/casino visits. A small percentage of respondents have had gaming experience outside of Nevada or New Jersey.

The majority of respondents plan to shop during their visit. On average, they spend $305.

Over three-fourths of the visitors stayed in a hotel/motel during their stay. Among the lodging features important to respondents, hotel location and walking convenience to other casinos are most important.

Respondents evaluated Las Vegas and the Downtown district positively. About 83 percent of the respondents expressed satisfaction with their trip and 93 percent would visit Las Vegas and Downtown Las Vegas again. Similarly, a high percentage would return to see the Fremont Street Experience attraction. The best-liked feature of Downtown Las Vegas is that everything, especially the casinos, is close. The least-liked feature is the presence of "bums/panhandlers."

Appendix A: Questionnaire

UNLV
UNIVERSITY OF NEVADA LAS VEGAS

Downtown Gaming Survey

Las Vegas Travel:

1. Are you in Las Vegas on:

☐ Vacation
☐ Convention
☐ Business (but not a convention)
☐ Local Resident
☐ Other (Specify): ____________________

2. How many nights do you plan to stay?____________________nights.

3. How much time are you allocating to gambling during your visit?__________hours.

4. How many times have you visited Las Vegas in the last year?____________times.

How many times have you visited Las Vegas in the past 10 years?__________times.

Where do you usually stay?

☐ Downtown ☐ Strip ☐ Other

Travel & Lodging:

5. How did you arrange your trip?

☐ Self-made Arrangements
☐ Convention
☐ Tour
☐ Travel Agent
☐ Other (Specify):____________________

6. Did you purchase a package deal for this visit to Las Vegas? (For example, meals, shows, gratuities.)

☐ Yes ☐ No

7. Average lodging expenditures per night. $________

8. Number of room occupants.

Under 21 years of age:________
21 or over years of age:________

9. **Where are you staying in Las Vegas?**

☐ With friends
☐ Hotel/Motel (Please specify):____________________
☐ Other (Please specify):____________________

Travel Arrangements:

10. **How important were the following when you were deciding where to stay during this trip?**

	Very Important	Somewhat Important	Not Important	Not Applicable
Recommendations from friends	☐	☐	☐	☐
Recommendations from travel agents	☐	☐	☐	☐
Shopping	☐	☐	☐	☐
Pool	☐	☐	☐	☐
Health spa	☐	☐	☐	☐
Advertisement	☐	☐	☐	☐
Hotel pricing	☐	☐	☐	☐
Hotel security	☐	☐	☐	☐
Hotel location	☐	☐	☐	☐
Walking convenience to other casinos	☐	☐	☐	☐
Golf	☐	☐	☐	☐
Tennis	☐	☐	☐	☐
Family entertainment in the hotel	☐	☐	☐	☐
Numerous restaurants in the hotel	☐	☐	☐	☐
Casino	☐	☐	☐	☐
Other (Specify):__________	☐	☐	☐	☐

11. **What was the ONE most important reason for your decision to visit Las Vegas?**

____

12. **What was the ONE most important reason in your decision to visit Downtown?**

____

If not staying at Downtown, how did you get to Downtown?

☐ Taxi
☐ Bus
☐ Rental Car
☐ Private Car
☐ Other

13. **Would you utilize a free express bus from the airport to Downtown?**

☐ Yes ☐ No

Would you utilize a free express bus form the Strip to Downtown?

☐ Yes ☐ No

14. Have you taken a tour to a border casino area or did you stop at a border casino on your auto or bus trip to Las Vegas? (Check all that apply)

☐ Yes ☐ No (Go to the next section, General Activity Patterns)

Where did you visit?	How long did you stay?
☐ Stateline or Jean (I-15)	______days
☐ Mesquite	______days
☐ Laughlin	______days

15. How many times in the past five years have you visited Laughlin?______times.

16. Have you visited Laughlin instead of Downtown in the past five years?

☐ Yes ☐ No

Why?______

General Activity Patterns:

17. What activities are you engaging in on this trip? (Check all that apply)

- ☐ Gaming
- ☐ Sightseeing by walking around
- Sightseeing by guided tour
  - ☐ In Las Vegas
  - ☐ Out of town (Hoover Dam, etc.)
- ☐ Showroom entertainment
- ☐ Visiting friends or relatives
- ☐ Business
- ☐ Shopping
- Sightseeing with a rental car
  - ☐ In Las Vegas
  - ☐ Out of town (Hoover Dam, etc.)
- ☐ Lounge entertainment
- ☐ Other:______

18. On this trip have you visited a specific hotel/casino for one of the following? (Check all that apply)

- ☐ See a show
- ☐ Go dancing
- ☐ See late-night entertainment
- ☐ See a special attraction
- ☐ Take advantage of a food special
- ☐ Listen to band
- ☐ Try to win a "special prize"(i.e., car, special jackpot)
- ☐ Other:______

19. Have you visited a hotel/casino as a result of any of the following types of advertising? (Check all that apply)

- ☐ TV
- ☐ Travel Literature
- ☐ Signs on taxis
- ☐ Discounts/Coupons
- ☐ Radio
- ☐ Travel Agents
- ☐ Literature in hotel room
- ☐ Word-of-mouth
- ☐ Newspapers
- ☐ Outdoor billboards
- ☐ Airport signs

20. Have you had a gaming experience outside Nevada or New Jersey within the past five years at any of the following? (Check all that are applicable)

☐ Riverboat
☐ Colorado
☐ Indian Gaming Establishment
☐ Deadwood, South Dakota
☐ Other:________________________
☐ None of the above

If a first-time visitor to Las Vegas, did this other gaming experience influence your decision to visit Las Vegas?

☐ Yes ☐ No

If repeat visitor, has this other gaming experience influenced your decision to visit Las Vegas again?

☐ Yes ☐ No

In what way?____

Downtown Las Vegas:

21. Which of the following downtown casinos have you visited? (Please check all that apply)

☐ California
☐ Four Queens
☐ Golden Nugget
☐ Las Vegas Club
☐ El Cortez
☐ Fremont
☐ Horseshoe
☐ Union Plaza
☐ Fitzgeralds
☐ Golden Gate
☐ Lady Luck
☐ None of the above

22. What do you like *best* about Downtown (Casino Center) Las Vegas?

23. What do you like *least* about Downtown (Casino Center) Las Vegas?

24. How would you rate your *OVERALL EXPERIENCE* in Las Vegas so far?

☐ Very satisfied
☐ Satisfied
☐ Neither satisfied nor dissatisfied
☐ Dissatisfied
☐ Very dissatisfied
☐ Don't know

25. How would you rate your experience in *Downtown* so far?

☐ Very satisfied
☐ Satisfied
☐ Neither satisfied nor dissatisfied
☐ Dissatisfied
☐ Very dissatisfied
☐ Don't know

26. Do you plan to visit Las Vegas again?

☐ Yes — Why?______________________________

☐ No — Why not?______________________________

27. Do you plan to visit Downtown again?

☐ Yes — Why?______________________________

☐ No — Why not?______________________________

Shopping:

28. Do you plan to shop during this visit?

☐ No ☐ Yes

Do you plan to buy gifts for:
(Check all that apply)

- ☐ Yourself
- ☐ Spouse, fiance, companion
- ☐ Casual friends
- ☐ Children/grandchildren

29. Which of the following specialty shops would you like to see open in the Downtown area? (Check all that are applicable)

- ☐ Unique Gifts
- ☐ Logo Wear
- ☐ Novelty Stores (i.e., Harley Davidson apparel)
- ☐ Music Store
- ☐ Neon Museum and Shop
- ☐ Other

30. How much are you planning to spend on shopping during this visit?__________

Fremont Street Experience:

Hotel/casinos and City officials recognize the need to revitalize Downtown. The new development known as the Fremont Stree Experience includes a spectacular reflective light canopy covering four blocks of Fremont Street with sparkling shade by day and a pulsating star field of light by night. Suspended from this "Celestial Vault" will be the "Sky Parade"–illuminated floats which will sweep through the night sky accompanied by light effects, music, lasers, and pyrotechnics. A five-block pedestrian mall beneath the canopy will feature a lively schedule of special events, live entertainment, and specialty shopping. A new parking structure which features exciting shopping venues round out the experience.

31. Would you come back (after January 1995) to see the Fremont Street Experience attraction?

☐ Yes ☐ No

32. What types of special events are you interested in?

☐ Live entertainment
☐ Sports events
☐ Food Fair
☐ Super Bowl
☐ Other
☐ Rodeo
☐ Musicfest
☐ Chinese New Year
☐ Octoberfest
☐ None

Demographics:

33. Zip code of residence?____________

34. Please approximate your total annual household income.

☐ Under $20,000
☐ $20,000 - $39,999
☐ $40,000 - $59,999
☐ $60,000 - $79,999
☐ Over $80,000

35. Household marital status.

☐ Never married
☐ Widowed
☐ Married
☐ Separated
☐ Divorced

36. Which racial group do you consider yourself a member of?

☐ American Indian
☐ Hispanic
☐ Asian/Pacific Rim
☐ White
☐ Black
☐ Other

37. **Employment status.**

☐ Employed (full-time or part-time)
☐ Homemaker
☐ Currently not employed
☐ Student

38. **Please complete the following information:**

Age:______

Sex: M or F

Highest Level of Education: (Check only ONE)

☐ Some high school
☐ Completed high school
☐ Some college
☐ Four-year college degree
☐ Some graduate college
☐ Graduate degree

39. **Please use space in the margins to make any additional comments you might wish to share on casinos and the casino industry.**

Thank you for your response.

Appendix B: Summary Statistics

```
WHY_OR_W  Visit Downtown again

                                                              Valid     Cum
Value Label                  Value  Frequency   Percent    Percent   Percent

I like it                      1.0       148      25.3       45.0      45.0
Gaming                         2.0        46       7.9       14.0      59.0
Dollar tables                  3.0         8       1.4        2.4      61.4
Live here                      4.0        22       3.8        6.7      68.1
To walk around                 5.0        35       6.0       10.6      78.7
Nice for vacation              6.0         5        .9        1.5      80.2
Hotel/food prices              7.0        20       3.4        6.1      86.3
Women                          8.0         4        .7        1.2      87.5
Lights                         9.0         4        .7        1.2      88.8
Shooping                      10.0         3        .5         .9      89.7
Sightseeing                   11.0         6       1.0        1.8      91.5
Friendly casino work          12.0         1        .2         .3      91.8
Not crowded                   13.0         1        .2         .3      92.1
Business                      14.0         1        .2         .3      92.4
Like Nugget                   15.0         7       1.2        2.1      94.5
Family here                   16.0         4        .7        1.2      95.7
Too crowded                   17.0         2        .3         .6      96.4
Like Four Queens              18.0         2        .3         .6      97.0
Like Horseshoe                19.0         1        .2         .3      97.3
Prefer Strip                  20.0         3        .5         .9      98.2
Too much poverty              21.0         2        .3         .6      98.8
Lost money                    22.0         3        .5         .9      99.7
Like Fitzgeralds              23.0         1        .2         .3     100.0
missing                       99.0       255      43.7    Missing
                                     -------   -------    -------
                             Total       584     100.0      100.0

Mean             4.100      Median         2.000      Mode            1.000
Std dev          4.821

Valid cases      329        Missing cases    255
```

```
OVERALL_  Overall experience in Las Vegas

                                                         Valid     Cum
Value Label                 Value  Frequency  Percent  Percent  Percent

Very satisfied                1.0        241     41.3     44.3     44.3
Satisfied                     2.0        245     42.0     45.0     89.3
Neither satisfied no          3.0         41      7.0      7.5     96.9
Dissatisfied                  4.0          5       .9       .9     97.8
Very dissatisfied             5.0          7      1.2      1.3     99.1
Don't know                    6.0          5       .9       .9    100.0
                             99.0         40      6.8  Missing
                                     -------  -------  -------
                            Total        584    100.0    100.0

Mean           1.726     Median         2.000       Mode            2.000
Std dev         .863

Valid cases      544     Missing cases     40

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EXPERIEN  Experience in Downtown

                                                         Valid     Cum
Value Label                 Value  Frequency  Percent  Percent  Percent

Very satisfied                1.0        224     38.4     41.3     41.3
Satisfied                     2.0        231     39.6     42.6     83.9
Neither satisfied no          3.0         70     12.0     12.9     96.9
Dissatisfied                  4.0          7      1.2      1.3     98.2
Very dissatisfied             5.0          6      1.0      1.1     99.3
Don't know                    6.0          4       .7       .7    100.0
                             99.0         42      7.2  Missing
                                     -------  -------  -------
                            Total        584    100.0    100.0

Mean           1.804     Median         2.000       Mode            2.000
Std dev         .880

Valid cases      542     Missing cases     42
```

```
LIKE_LEA  Like least about Downtown

                                                        Valid     Cum
Value Label                 Value  Frequency  Percent  Percent  Percent

Bums/panhandlers              1.0         57      9.8     21.2     21.2
Homeless                      2.0         16      2.7      5.9     27.1
"Charity" workers as          3.0         17      2.9      6.3     33.5
Dirty streets                 4.0         24      4.1      8.9     42.4
Crime                         5.0          5       .9      1.9     44.2
Unsafe feeling                6.0         10      1.7      3.7     48.0
Parking                       7.0         14      2.4      5.2     53.2
Scam artists who pul          8.0         14      2.4      5.2     58.4
Drinks                        9.0          2       .3       .7     59.1
Old, outdated                10.0         13      2.2      4.8     63.9
Can't win                    11.0         13      2.2      4.8     68.8
Crowds                       12.0         13      2.2      4.8     73.6
Traffic                      13.0         10      1.7      3.7     77.3
Bicycle Police               14.0          8      1.4      3.0     80.3
Rude, unfriendly cas         15.0          8      1.4      3.0     83.3
Need better entertai         16.0          5       .9      1.9     85.1
Smokey                       17.0          6      1.0      2.2     87.4
Noisy                        18.0          3       .5      1.1     88.5
Too far from Strip           19.0         13      2.2      4.8     93.3
Fitzgeralds                  20.0          3       .5      1.1     94.4
Smutty newspaper             21.0          5       .9      1.9     96.3
Drug dealer/addicts          22.0          2       .3       .7     97.0
Food quality                 23.0          1       .2       .4     97.4
Need more casinos            24.0          4       .7      1.5     98.9
Some casinos dirty           25.0          3       .5      1.1    100.0
missing                      99.0        315     53.9  Missing
                                     -------  -------  -------
                            Total        584    100.0    100.0

Mean           8.275     Median        7.000     Mode           1.000
Std dev        6.700

Valid cases      269     Missing cases    315
```

Las Vegas Gaming Survey: 1990
Executive Summary
and
Major Findings

Prepared for

Downtown Progress Association

Prepared by

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February 10, 1991

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LAS VEGAS GAMING SURVEY
DOWNTOWN PROGRESS ASSOCIATION

I. Scope of Study

The UNLV Center for Business and Economic Research conducted an extensive four part marketing research study for the Downtown Progress Association during October and November 1990. By using alternative survey techniques, The Center gained a greater perspective on the attitudes of both existing and prospective customers. Our research tasks, which were agreed upon, were as follows:

A. Intercept Surveys: Las Vegas Residents and Visitors

Using cooperatively developed and approved survey questions, University researchers set up interview stations in Downtown Las Vegas. University personnel then proceeded to 'intercept' and ask individuals walking by to complete the appropriate 'Resident' or 'Visitor' survey form. The Visitor survey form consisted of 37 predetermined questions, with 219 subsets of those questions requiring additional responses. The Resident survey form consisted of 21 questions with a total of 172 variable subsets.

The principal purpose of this phase was to:

(1) Divide the persons surveyed into local residents and visitors to Las Vegas and then determine if their perceptions and opinions were significantly different.

(2) Compile a listing of the casinos which the individual had recently visited.

(3) Identify the casino attributes that people liked best.

(4) Identify, how and when, the individual decided to visit Downtown.

We surveyed a total of 386 local residents and 522 visitors using the intercept format.

B. Telephone Survey: Local Residents

This study task was to corroborate previous findings and to provide a further in-depth analysis of the gaming activities and opinions of Las Vegas residents. Using telephone interviews we also gathered opinions on casino advertising.

We set our acceptable criteria at a margin of error of 5 percent with a 95 percent confidence level. This level of analysis requires a minimum telephone sample size of 384 completed interviews. Thus, we generated robust sample results.

We used a proportional sampling of 10,000 Las Vegas residents. The proportions reflected population densities of the zip code areas. The telephone prefixes for each zip code area were used. Telephone directory suffixes and random 4-digit dialing (last four digits within each prefix) were used to select the respondents. We dialed about 7,500 numbers. Each interview took approximately eight minutes. We completed 400 interviews (one individual, 21 years and older, per household).

The targeted questions were to identify:

(1) The residents' perceptions of the Downtown district and Downtown casinos;

(2) The residents' general leisure time and entertainment preferences;

(3) The residents' recall of various casino marketing and advertising promotions utilizing aided and unaided telephone interview techniques; and

(4) Respondents' opinions about the attitudes of various casino characteristics, for example, games offered, dining and services.

About 63 percent of the participants were female and about 62 percent were over 35 years of age. The average household size in the sample was 3.0, with about 64 percent of households not having a child under age 16. The average annual family income was within the $25,000 to $35,000 range. The average length of residency in Southern Nevada for the sample was 12.7 years. About 63 percent of the residents lived in houses and 21.3 percent lived in apartments.

C. Local Mail Survey

The Center mailed 6,000 survey forms to local residents and received 795 completed questionnaires. The survey form consisted of 32 primary questions, and 198 sub-sets of those questions.

The principal purpose of this phase was to:

(1) Ascertain the casinos visited over the past 30 days and the extent of interest and satisfaction with the services provided by the casinos to individuals currently residing in Las Vegas.

(2) Determine residents' casino visitation patterns and decision-making criteria to find answers to such questions as:

  (a) Frequency of visits to casinos;

  (b) Games, promotions and amenities preferred;

  (c) Interest in border, Strip and neighborhood casino areas;

  (d) Entertainment and gaming preferences within a casino environment; and

  (e) Perceptions and opinions of Downtown Las Vegas environment.

D. Airport Visitor Intercept Survey

During November, 1990, researchers interviewed 440 visitors to Las Vegas who were in the process of departing from various gate locations at McCarran International Airport. The Airport Visitor Survey was identical to the "Visitor Downtown Intercept Survey."

The principal purpose of this phase of the study was as follows:

(1) To secure the opinions of a wide range of visitors to Las Vegas that were both geographically and demographically diverse;

(2) To identify visitors' perceptions, and thus complete an evaluation of the full array of Southern Nevada gaming, lodging and casino activities in which they participated while in Las Vegas;

(3) To seek potential cross-cutting customer market segments which Downtown casinos might target for increased patronage;

(4) To identify additional areas of potential customer development; and

(5) To further understand the visitor's decision-making process and the resulting selection of gaming properties that visitors patronize.

II. Introduction to the Major Findings

Given the breadth and scope of this market study, we generated a considerable volume of data. Therefore, to facilitate the analysis of the data, the principal conclusions arising from the analysis of the questions have been set forth in several sets of highly specific charts and graphs. These graphics form the bulk of the report and summarize the major findings of the study. These findings are provided separately from this overview and executive summary.

The interpretation and analysis of the study data combines both scientific interpretation and professional judgment. From these we offer some marketing recommendations which the Downtown Progress Association may want to evaluate as prospective solutions to the identified issues.

Individual casino attributes, or that set of advantages any one casino may choose to emphasize or market, were not specifically designed to be addressed in the study. However, individual members of the Downtown Progress Association will find a considerable array of useful marketing data is contained in the study, which should further assist an individual property's own business development planning effort.

Gaming constitutes the economic base of Nevada. As such, visitor expenditures generate money flows into the state. But, these expenditures are not the sole source of financial flows. The expenditures of local residents and the subsequent re-spending also constitutes a major effect on the Nevada economy. This report summarizes the attitudes and opinions of these two major consumer markets as they effect casino operations in Downtown Las Vegas. The overall study was designed to address five central issues:

1) To gauge advertising effectiveness (primarily evaluated using a telephone survey of local residents).

2) To measure local attitudes and opinions about Downtown (primarily using a mail questionnaire).

3) To measure attitudes and opinions among local Downtown customers (using a personal intercept survey).

4) To measure attitudes and opinions among Downtown out-of-town visitors in particular (using a personal intercept survey).

5) To measure attitudes and opinions among out of town visitors in general (both Downtown and those not visiting Downtown using a personal intercept survey at the airport).

III. MAJOR FINDINGS

Let us begin by noting our fundamental belief that competition within the American free enterprise economy creates incentives for continued product and service improvement and thus bottom line profits. In this regard, the current casino and hotel expansions on The Strip, in Las Vegas neighborhoods, and on stateline locations have affected the previous market share of certain Downtown casino properties. Thus, given continued competitive pressures, Downtown casinos and hotels that fail to consistently initiate product and service improvements (particularly improvements which customers value) should reasonably expect to lose customer patronage and market share.

When considered from another perspective, the recent property expansions may, however, also create marketing opportunities. For example, more tourists may visit Southern Nevada as a result of Strip property expansions and these expansions may also foster additional customers for Downtown. Thus, this growing tourism market may also create unique market niches which Downtown casinos may exploit. For example, with targeted marketing strategies Downtown properties may convince these additional visitors of the unique and varied Downtown casino recreational options.

Another major finding reveals the fact that visitors and local residents differ in their attitudes and opinions about Downtown Las Vegas. Visitors travel to Las Vegas from throughout the world to participate in a unique vacation environment. The typical visitor anticipates a pause from the normal routine of life and finds in Nevada the availability of spontaneous around the clock entertainment options. On the other hand, 'locals' approach casinos generally seeking a break from day-to-day routines. Residents do not view a casino visit as a vacation, but rather a few hours of gaming, dining, or an entertainment interlude. Thus, visitors and locals represent major and separable market segments for Downtown casinos.

A. Local Mail Survey

The local mail survey identified the following key issues:

What Residents Like Most About Downtown
(Opportunities to be exploited)

1) Casinos Close Together
2) Food

What Residents Like Least About Downtown
(Negatives to be corrected)

1) Vagrants/Homeless
2) Dirty
3) Parking
4) Crowded
5) Unsafe

Addressing Negatives:

Future efforts should address these negative perceptions in terms of the following three questions:

1) Are these negatives surmountable?

2) If so, will surmounting the negatives help in any way?

3) If a negative can be surmounted, who will have to help?

Casino Selection:

Qualities:

1) Good Food
2) Parking Ease
3) Good and Friendly Services
4) Convenient to Home

Usual Activities (Ranked):

1) Dining
2) Gaming
3) Cocktails

Food, convenience, and services are the key attributes to attract local customers. Good dining complements gaming. Neighborhood casinos dispersed throughout Las Vegas have a comparative advantage due to their convenience to residential customers; therefore, Downtown casinos will increasingly have to compete on other attributes -- particularly food and service, and to a lesser extent shows. Again, local residents recognize that going Downtown gives them ease in the breadth of choice. Thus, a Downtown advantage may arise out of the development of a wide range of good food, entertainment and gaming opportunities, all of which are within easy walking distance.

A Further Examination of Local Mail Survey Responses

Following preliminary discussions with Association members a further breakout of the results and the Local Mail Survey was completed. With more than 600 responses from throughout the City a substantial data base of resident opinions regarding Downtown was established.

The mail survey responses from the 5 zip codes immediately surrounding the Downtown area was extracted and tabulated separately. Utilizing this grouping a difference in local resident views on several subjects evolved.

In brief, it was found those respondents living in proximity to Downtown were significantly more positive in their opinion of the Casino Center area. (It may be noted that the Downtown Intercept Survey of local residents phase of the study also provided generally positive resident attitudes toward Downtown, as did the Airport Intercept Survey).

The negative impressions that dominated both zip code groupings were principally related to residents perceptions of Downtown as old fashioned in appearance, crowded and that parking is generally inconvenient.

In addition as was noted previously the outlying suburban zip codes also expressed exceptionally high negative attitudes that the Downtown area was unclean, unsafe and generally 'undesirable'.

The positive impressions expressed by both zip code groupings related to the Downtown areas being perceived as inexpensive and relatively easy to drive to.

B. Local Telephone Survey

Telephone Survey respondents were predominantly female. We believe the impressions of this survey, although in most cases corroborative of the mail survey, do, nonetheless, reflect more of a female response pattern. Thus, we believe this survey offers additional information. In addition the telephone survey focused on unaided (that is, unprompted recall questions) and aided (prompted) questions on advertising.

Advertising:

1) Most people were unable to recall casino advertising.
2) Most people recalled advertising of a specific casino when prompted, but some of the replies reflected the respondents recall of the casino name rather than recent advertising for the casino.
3) Thus, we conclude that much of the present casino advertising is relatively ineffective for <u>LOCALS</u>.

Impressions:

1) Most local residents rarely visit Downtown.

2) Most telephone respondents tended to give Downtown a positive image rating in comparison to alternative gaming areas.

3) However, 52.1 percent rated Downtown unsafe and one-half rated Downtown as an undesirable area.

4) We believe from this survey, that women have a higher concern for their personal safety than men in visiting Downtown.

Border Casinos:

1) Most local residents do not regularly visit border casinos.

2) Thus, the increased patronage and border casinos' improved market share principally reflects the success of these casinos in attracting additional net new out-of-state visitor activity.

Given the more positive attitudes of residents in proximity to Downtown it is be suggested that marketing efforts targeted at locals residing there would be highly cost effective and could generate increased patronage.

To attract increased suburban customers a more extensive and long-term marketing campaign is suggested. For direct comparison purposes the following summary of the zip code breakouts may be reviewed.

Larger issues of comprehensive planning, Downtown renewal, improved parking as well as public safety concerns are obvious matters for further action by the Association.

C. Airport Intercept Survey

A further reexamination of the 440 Airport Intercept Surveys did not reveal substantial change from our earlier conclusions. As may be noted from a review of the following charts, regardless of where or what areas air travelers to Las Vegas stayed or visited, the opinion of Downtown and The Strip were generally positive and fairly uniform. The principal opinion differences as expected arose from those who stayed on The Strip vs. those who stayed Downtown, with safety concerns being the highest variance in positive-negative attitudes.

It should also be noted that only 19 of the air travelers stayed Downtown, in comparison with 282 who stayed on The Strip. Nevertheless, we received 162 of 440 completed questionnaires from persons having visited Downtown. The issue of marketing to attract air travelers to Downtown is another issue for possible further study and action by the Association.

	* Areas Close To Downtown	All Other Areas
Number of Respondants	127	587
Modern	40.6%	35.5%
Old Fashioned	59.4%	64.5%
Positive Image	59.6%	42.8%
Negative Image	40.4%	57.2%
Casino Center	23.4%	23.2%
Just Downtown	76.6%	76.8%
Inexpensive	88.7%	89.9%
Expensive	11.3%	10.1%
Clean	50.0%	39.8%
Unclean	50.0%	60.2%
Safe	49.0%	34.4%
Unsafe	51.0%	65.7%
Nice Area	47.4%	29.9%
Undesirable	52.6%	70.2%
Casino Center	49.0%	34.2%
Glitter Gulch	51.0%	65.8%
For Locals	56.3%	41.1%
For Visitors	43.7%	58.9%
Crowded	69.3%	77.1%
Uncrowded	30.7%	22.9%
Easy Driving	64.5%	48.0%
Hard Driving	35.5%	52.0%
Convenient Parking	44.0%	35.0%
Inconvenient Parking	56.0%	65.0%
Overall Favorable	58.0%	39.9%
Overall Unfavorable	42.0%	60.1%
No Problem Parking	55.0%	61.5%
Problem Parking	45.0%	38.5%
Time of Day Problem Parking		
Morning	24.2%	20.7%
Afternoons	37.9%	26.4%
Evenings	30.3%	52.6%
Late Nights	7.6%	0.3%

* zip=101,102,104,106,107

APPENDIX B.

AIRPORT INTERCEPT SURVEY

(page 1 of 3)

440 respondants

	Visited Downtown Only	Visited Strip Only	Visited Strip and Downtown	Stayed Downtown	Stayed at the Strip	Stayed on Strip No Visit Downtown	Stayed on Strip Visited Downtown
# of Respondants	162	148	310	19	282	226	96
Modern	54.1%	46.2%	51.6%	67.0%	53.2%	52.3%	51.5%
Old Fashioned	45.9%	53.8%	48.4%	33.0%	46.8%	47.7%	48.5%
Positive Image	71.6%	66.7%	70.1%	85.7%	71.6%	70.1%	72.9%
Negative Image	28.4%	33.3%	29.9%	14.3%	28.4%	29.9%	27.1%
Casino Center	58.3%	54.5%	57.1%	63.6%	56.6%	55.0%	50.7%
Just Downtown	41.7%	45.5%	42.9%	36.4%	43.4%	45.0%	49.3%
Inexpensive	78.9%	71.1%	70.4%	94.1%	76.2%	80.2%	81.7%
Expensive	21.1%	28.9%	23.6%	5.9%	23.8%	19.8%	18.3%
Clean	67.2%	60.7%	65.1%	87.5%	62.9%	60.5%	65.8%
Unclean	32.8%	39.3%	34.9%	12.5%	37.1%	39.5%	34.3%
Safe	72.6%	61.2%	69.0%	93.8%	62.7%	56.9%	61.9%
Unsafe	27.4%	38.8%	31.0%	6.2%	37.3%	43.1%	38.1%
Nice Area	71.7%	63.3%	69.0%	78.6%	68.2%	62.1%	66.7%
Undesirable	28.3%	36.7%	31.0%	21.4%	31.8%	37.9%	33.3%
Casino Center	67.0%	68.2%	67.4%	100%	65.3%	64.9%	60.3%
Glitter Gulch	33.0%	31.8%	32.6%	*	34.7%	35.1%	39.7%

AIRPORT INTERCEPT SURVEY

(page 2 of 3)

440 respondants

	Visited Downtown Only	Visited Strip Only	Visited Strip and Downtown	Stayed Downtown	Stayed at the Strip	Stayed on Strip No Visit Downtown	Stayed on Strip Visited Downtown
For Locals	42.4%	44.9%	43.2%	46.2%	40.0%	44.0%	39.7%
For Visitors	57.6%	55.1%	56.8%	53.8%	60.0%	56.0%	60.3%
Crowded	56.8%	65.9%	59.8%	63.6%	62.1%	59.6%	53.6%
Uncrowded	43.2%	34.1%	40.2%	36.4%	37.9%	40.4%	46.4%
Easy Driving	70.4%	62.2%	67.8%	100%	63.6%	59.4%	69.6%
Hard Driving	29.6%	37.8%	32.2%	*	36.4%	40.6%	30.4%
Convenient Parking	64.3%	54.3%	61.3%	90.0%	52.8%	48.4%	55.9%
Inconvenient Parking	35.7%	45.7%	38.7%	10.0%	47.2%	51.6%	44.1%
Overall Favorable	76.2%	64.0%	72.3%	100%	69.4%	73.0%	76.5%
Overall Unfavorable	23.8%	34.0%	27.7%	*	30.6%	27.1%	23.5%
No Problem Parking	67.0%	70.0%	67.6%	77.8%	60.4%	56.8%	61.5%
Problem Parking	33.0%	30.0%	32.4%	22.2%	39.6%	43.2%	38.5%
Time of Day Problem Parking:							
Morning	14.3%	27.3%	17.9%	50.0%	07.9%	13.5%	14.3%
Afternoon	21.4%	*	15.4%	*	21.1%	21.6%	23.8%
Evening	57.6%	54.5%	56.4%	50.0%	63.2%	54.1%	52.4%
Late Night	7.2%	18.2%	10.3%	*	7.8%	10.8%	9.5%

AIRPORT INTERCEPT SURVEY

(page 3 of 3)

440 respondants

	Visited Downtown Only	Visited Strip Only	Visited Strip and Downtown	Stayed Downtown	Stayed at the Strip	Stayed on Strip No Visit Downtown	Stayed on Strip Visited Downtown
Like Best about Downtown:							
Closeness of Casinos	29.0%	31.3%	29.4%	70.0%	24.6%	*	*
Like Everything	18.8%	45.3%	15.3%	10.0%	9.8%	*	*
Gambling	18.8%	18.8%	18.8%	10.0%	19.7%	*	*
Certain Casinos	18.8%	16.5%	16.5%	*	19.7%	*	*
Atmosphere	14.7%	20.0%	20.0%	10.0%	26.2%	*	*
Like Least about Downtown:							
Street Bums	18.4%	18.7%	18.5%	*	17.3%	*	*
Dirty	26.3%	18.8%	24.1%	*	25.0%	*	*
Crowded	18.4%	18.7%	18.5%	*	17.3%	*	*
Unsafe	18.4%	18.8%	18.5%	*	17.3%	*	*
Transportation	18.5%	25.0%	20.4%	*	23.1%	*	*

DOWNTOWN LAS VEGAS AT A CROSSROADS:

New Directions for the Downtown Las Vegas Partnership

DOWNTOWN
LAS VEGAS
PARTNERSHIP

Prepared for the
Downtown Las Vegas Partnership
by
Progressive Urban Management Associates

May 1994

Downtown Las Vegas at a Crossroads:
New Directions for the
Downtown Las Vegas Partnership

May 1994

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EXECUTIVE SUMMARY

The 1990s have brought a period of unprecedented growth in jobs, investment and tourism to the Las Vegas metropolitan area. In the shadow of regional prosperity, Downtown Las Vegas has struggled. The market share of Downtown's legendary "glitter gulch" casinos has eroded and urban problems have been evidenced by deteriorating buildings and increasing concerns over public safety.

To reverse these trends, the City of Las Vegas and Downtown gaming interests are investing more than $60 million to construct the Fremont Street Experience (FSE). FSE will transform Fremont Street, the central corridor of Downtown's gaming industry, into a world class multi-media entertainment attraction. Plans include a 1,500 foot long and 100 foot high computer-generated visual and audio canopy to further energize and enliven Fremont Street plus a new parking garage to accommodate 1,500 vehicles. The new space will be managed by the FSE Limited Liability Corporation, providing maintenance, security and marketing services.

Prior to forming the FSE, Downtown's gaming industry pursued joint advocacy and marketing initiatives through the Downtown Progress Association (DPA). Established in 1976, the DPA (now the Downtown Las Vegas Partnership) was a business leadership organization aiming to improve the economic well being of Downtown Las Vegas. From 1990 to the beginning of 1994, the DPA board consisted of ten major Downtown casinos and hotels. With the imminent development of FSE, the future of the DPA became uncertain.

To determine the feasibility for the DPA to expand its membership base and redirect its activities, the organization retained Denver-based Progressive Urban Management Associates (P.U.M.A.), a downtown development consulting firm. P.U.M.A. met with 40 business leaders representing 27 non-gaming enterprises to assess Downtown's strengths, weaknesses, priorities and appetite for supporting a broad based DPA. Five industry-specific focus groups, one collective workshop and a meeting with the DPA directors were held as part of the assessment process.

From this process, it became clear that there is sufficient interest, energy and potential financial backing among a diverse core group of Downtown businesses to support an expanded and revitalized DPA -- the Downtown Las Vegas Partnership. The following recommendations are provided to guide the Partnership into a new era as the inclusive downtown business leadership organization for Las Vegas:

Recommended New Directions for the Downtown Las Vegas Partnership

Mission: The Downtown Las Vegas Partnership represents Downtown Las Vegas' diverse business interests to ensure that Downtown is safe, clean and economically vibrant.

Structure: The Partnership will be structured as a non-profit membership organization, most likely a 501(c)(6) corporation. The Partnership will be governed by a 12 to 18 member board of directors representing diverse business types found in Downtown Las Vegas. Board representation must be provided for the Fremont Street Experience to link the Partnership to Downtown gaming interests.

In addition to the board of directors, public safety and economic development committees are to begin work immediately.

Budget: A start-up operating budget of $147,000 is recommended. Suggested sources of start-up funds include membership dues and matching community development and/or general funds from the City of Las Vegas. Membership dues levels will be tiered to reflect variables within selected business categories. An initial membership goal of 100 businesses and $100,000 in dues is recommended.

Timetable: A six-month transitional timetable is recommended:

June through October: A steering committee of 12 to 15 is charged with recruiting 100 members and $100,000 in membership pledges, resolving organizational issues such as by-laws and a new organizational name, and managing the public safety and economic development committees.

October through December: After membership goals have been secured, the interim board will initiate a regional search for a new executive director.

January 1, 1995: A new executive director will be hired and a permanent board of directors will be elected by the Partnership membership.

Role of Casinos: Continued active involvement by the DPA casino directors is strongly recommended through membership dues, representation on the Partnership board of directors and provision of part time staff support through the six-month transitional period.

PROJECT OBJECTIVES AND METHODOLOGY

Established in 1976, the Downtown Progress Association (DPA) was a business leadership organization aiming to improve the economic well being of Downtown Las Vegas. The DPA pursued a number of relatively low key marketing and advocacy functions until 1990 when the DPA board was replaced by representatives from Downtown's ten major casinos and hotels. Since 1990, the DPA has focused on methods to revitalize a Downtown gaming industry that has been confronted with formidable economic challenges within a relatively short period of time.

Las Vegas' Downtown casinos reached an economic pinnacle in 1988. During that year, Downtown casinos captured a 20% share of the Las Vegas gaming market, earning a net income of $77 million on total revenues of nearly $900 million. Downtown appeared firmly entrenched as a destination for the visitor seeking a pure gaming experience.

By the early 1990s, the Downtown gaming market had tumbled and long term erosion was feared. By 1992, market share had dropped to 16%, with losses of $39 million on revenues of slightly less than $1 billion. Downtown's market share was slipping due to the combined influences of new "mega-resorts" on the Las Vegas Strip, the expansion of gaming to dozens of states throughout the nation and increased popularity of border casinos, such as Laughlin, which drew gambling-oriented visitors.

To combat this trend, Downtown casinos and the City of Las Vegas united to develop The Fremont Street Experience (FSE). Designed by internationally acclaimed architect Jon Jerde, FSE will convert Downtown's central corridor into a world class multi-media entertainment attraction. The project is to be completed in 1995 and will be maintained, secured and programmed by the recently formed FSE Limited Liability Company. The FSE Limited Liability Company consists of the ten gaming interests that have invested in the project and comprise the DPA board of directors at the time of this study.

By the spring of 1994 and with the FSE under construction, the DPA found itself at a key crossroads in its evolution. Several of the DPA's existing board members indicated that they would like to see the organization expand its membership base and redirect its activities into a number of downtown planning, development, marketing and management functions; however, support for the DPA beyond the gaming industry was unclear. To chart a new future for the DPA, Progressive Urban Management Associates (P.U.M.A) was retained to complete an organizational assessment that would meet the following objectives:

I. Orient a diverse array of downtown stakeholders on the various service and program options available through an expanded DPA;

II. Based upon stakeholder input, establish service and program priorities for an expanded DPA;

III. Assess whether there is significant support to participate in and fund an expanded DPA;

IV. Provide a gameplan outlining the next steps for expanding the DPA, including organizational development issues, specific service and program options, responsibility centers, timelines and budget.

To meet these objectives, P.U.M.A. and DPA staff coordinated the following process during a three day site visit in April of 1994:

Stakeholder Focus Groups: Five focus group meetings were held with stakeholders representing different business sectors in Downtown Las Vegas. Each focus group met for about 90 minutes. A discussion of Downtown's strengths and weaknesses was followed by a presentation of the service and program options available through an expanded downtown association. Participants were then asked to rank their top priorities from a list of 12 potential new services and programs, given that they would have to pay something to receive them. The more services and programs they choose, the more it would ultimately cost them.

Individual, group and collective responses were recorded with the survey instrument provided in Exhibit 1.

Participant Workshop: All focus group participants were invited to attend a workshop to gain a consensus from all business sectors on the collective priorities for an expanded downtown association. After a presentation of the focus group survey results, a recommended organizational mission, structure, budget and timetable was presented. If the group recommended to proceed with expanding the DPA, an expansion steering committee would be created involving a diverse representation of business segments. The steering committee would be charged with carrying out the recommendations of the workshop and the subsequent consultant's report.

Role of the Existing DPA Board: The consultant and DPA staff met with the existing DPA board to gauge its reaction to the findings of the focus groups and workshop, and clearly define the best role for members of the existing DPA board, primarily Downtown's larger casino and hotel interests.

FOCUS GROUP FINDINGS

To assess priorities and an appetite for financially supporting an expanded Downtown Progress Association, five focus group meetings were held with individuals representing the following business types:

- finance and legal;
- real estate and construction;
- hospitality;
- retail and distribution;
- miscellaneous services.

40 persons representing 27 Downtown businesses participated in the focus groups. Each focus group discussed Downtown Las Vegas' strengths and weaknesses. Following a presentation on the services and programs available through an expanded Downtown Progress Association, each business in each group was surveyed to identify both service priorities and the business community's willingness to pay for new services.

Results from individual focus groups are provided in Exhibit 2.

Collective strengths, weaknesses, priorities and issues from the five focus groups are discussed in the following pages.

Strengths and Weaknesses

The five focus groups identified the following strengths and weaknesses for doing business and/or owning property in Downtown Las Vegas. The number to the right of each attribute indicates the number of focus groups identifying the attribute as a strength or weakness.

<u>Strengths</u>	
Easy Freeway Access	(5)
Casinos	(3)
Location of City/County Offices	(3)
Central Location	(2)
Tourism Impacts	(2)
Compact Pedestrian Scale	(2)
Incredible Potential	(1)
Financial Institutions	(1)
City Political Commitment	(1)
Locally-Owned Small Businesses	(1)
Day Business/Strong Lunch	(1)
History	(1)
Competitive/Low Pricing	(1)
Bicycle Patrol	(1)
<u>Weaknesses</u>	
Safety	(5)
-Reality	(3)
-Perceived	(5)
Run Down Appearance	(5)
-Buildings	(5)
-Streets	(2)
Disruptive Street Elements	(5)
-Panhandling	(4)
-Homelessness	(2)
-Hawkers	(1)
Lack of Employee Services/Poor Retail Mix	(3)
Lack of Consistent Code/Zoning Enforcement	(3)
Parking Availability	(3)
Lack of Political Will/City Support for Downtown	(3)
Image of Decline	(3)
Erosion of Economic Base	(3)
Deteriorating Neighborhoods	(2)

Priorities

Focus group participants were asked to list their priorities for new downtown services, provided that they would need to pay something to receive new services. Collective priorities of the 27 participating businesses are listed below. The average survey ranking noted to the right of each service provides a relative measure of the importance of each service.

Priority/Service		Survey Ranking
1.	Planning & Development	6.3
2.	Security	6.6
3.	Parking/Transportation	8.0
4.	Economic Development	8.1
5.	Maintenance	8.4
6.	Social Services	8.6
7.	Streetscape Improvements	8.7
8.	Advocacy/Communications	9.0
9.	Marketing & Promotions	9.3
10.	Special Events	10.8
11.	Employee Services	11.0
12.	Cultural Arts	11.4

As evidenced by this survey, business community priorities in Downtown Las Vegas are different from *typical* priorities in other cities throughout the nation. Most downtown communities mobilize private sector resources through management districts and/or associations to address security, maintenance, and marketing and promotions issues. In Las Vegas, these issues are overshadowed by an emphasis on "planning and development", "parking availability" and the related concern of "economic development".

A partial explanation lies in the business community's perception that the Downtown lacks a comprehensive vision or plan and is not well positioned to take advantage of, and in fact might be eroded by, continued rapid regional growth.

Security was listed as a top priority, but the general emphasis was placed on working out a stronger relationship with the Las Vegas police, as opposed to providing private sector security.

Issues

Following the discussion of strengths, weaknesses and priorities, each focus group was asked to identify issues related to the possible expansion and evolution of the Downtown Progress Association into the Downtown Las Vegas Partnership. The following issues were identified by multiple focus groups:

1. **Opportunity to Capitalize on Momentum Created by FSE:** Beyond the gaming industry, the Downtown business community recognizes the potential economic benefits resulting from the Fremont Street Experience. The effort to expand the Downtown Las Vegas Partnership was generally viewed as a positive way to maximize the benefits of FSE and strengthen the Downtown economy beyond the Fremont Street core.

2. **Do Not Want to Create a New Bureaucracy:** Participants were clear that the Partnership should not grow too big and were concerned that it not end up obstructing the progress of individual businesses. The Partnership should remain supportive of Downtown business interests, and operate through a "lean and mean" organizational infrastructure.

3. **Need to Evaluate Costs Versus Value:** Businesses evidenced a willingness to pay for new services, but they want to be sure that costs are commensurate with benefits.

4. **Want Casinos as Partners:** The non-gaming businesses emphasized the need to maintain active involvement by the casinos in the Partnership. The non-gaming business community wants the casinos as partners, but does not want the casinos to control or drive an expanded Partnership.

5. **Must Link Partnership to FSE:** There was concern that the Partnership should not evolve to work at odds with the FSE. A healthy Downtown will benefit all Downtown interests -- many issues will require a strong working relationship between gaming and non-gaming businesses. A structural link between the Partnership and FSE was strongly recommended.

6. **Process Fatigue -- Just Do It!** Participants emphasized that if the Partnership expands, it should expand with minimal process or study. The business community wants to be involved if the Partnership can be effective at realizing tangible results. There is no desire for endless meetings and process

RECOMMENDATIONS

The Downtown stakeholder focus groups and workshop evidenced a strong participatory and financial willingness to proceed with expanding the Downtown Progress Association as the new Downtown Las Vegas Partnership.

Based upon the identified strengths, weaknesses, priorities and issues, the consultant and DPA staff undertook an assessment of Downtown's organizational capabilities and resources to develop recommendations charting new directions for the Downtown Las Vegas Partnership. Recommendations include a revised mission, organizational structure, budget and implementation timetable. These recommendations were presented to focus group participants at the collective workshop. Input from the workshop was incorporated into the recommendations, providing the following framework for a revitalized Partnership.

Mission

The Downtown Las Vegas Partnership represents Downtown Las Vegas' diverse business interests to ensure that Downtown is Safe, Clean and Economically Vibrant.

The revised mission aims to embody a sense of inclusiveness, proclaiming that "diverse business interests" will now be represented in addition to the gaming businesses which compose the current DPA board. From the focus group process, it appeared that "safe, clean and economically vibrant" characteristics are common denominator goals for all business types within the Downtown.

Structure

Several options are available for the restructuring of the Partnership, including an entrepreneurial community development corporation, mandatory business or property tax assessment-based management district or a voluntary membership organization. Different organizational structures are more responsive to specific priorities and service needs within a downtown. A mandatory assessment district is best for a delivering a "service agenda" that will benefit each stakeholder equally. Community development corporations advance "development agendas" to catalyze specific housing and/or economic development projects. A membership organization is perhaps most effective at carrying out a "civic agenda", which involves mobilizing the business community in areas of advocacy, policy and planning.

A 501(c)(6) non-profit membership organization is recommended as the best structure for the Partnership. As evidenced by the focus group process, the business community listed a "civic" agenda with the following distinct priorities:

* *Planning & Development*, the top priority of the business community, is viewed as needed to establish a clear "vision" for Downtown's evolution, and insure that Downtown captures its share of Las Vegas' explosive regional growth. In this context, planning and development becomes a policy issue, as the business community seeks to influence comprehensive planning efforts.

* *Security* concerns were discussed within the context of building a better working relationship with the Las Vegas police department. There was no clear consensus on whether the business community wants to supplement City security services at this time. Security becomes an advocacy issue, as the business community mobilizes to obtain more effective services.

* *Parking Availability* and *Economic Development* are closely related issues that were rated as Downtown's third and fourth priorities. Parking availability was identified as a critical obstacle hindering Downtown's ability to be a competitive business location with new suburban competition. There is also increasing concern with the eventual planned relocation of County offices. Parking and economic development become advocacy and policy issues, as the Downtown business community develops initiatives to remain a viable business center.

As a membership organization, a 15 to 18 member board of directors is recommended for the Partnership. Directors should represent a variety of business types found in the Downtown and be well rooted in Downtown, either through a direct property and/or business ownership interest.

To maximize potential member involvement, three initial working committees are recommended:

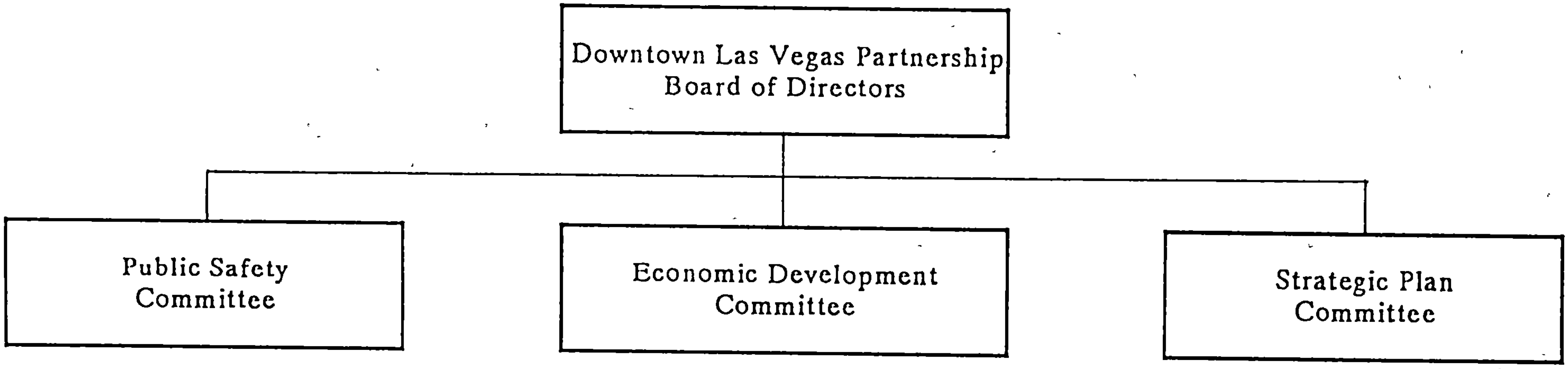
* A *Public Safety Committee* is suggested to work with the police to develop collaborative strategies combatting crime, disruptive street elements and inconsistent code enforcement.

* The *Economic Development Committee* would develop Downtown-wide initiatives and strategies related to parking availability, overall image, and business retention and recruitment.

* The *Strategic Plan Committee* would work with the City and other relevant agencies to guarantee business community input into the development of a Downtown master plan and vision.

The chart on the following page illustrates the revised Partnership structure.

Proposed Structure



Downtown Las Vegas Partnership
Board of Directors

Public Safety
Committee

- Crime/Police
- Disruptive Street Elements
- Code & Zoning Issues

Economic Development
Committee

- Parking
- Image
- Recruitment and Retention

Strategic Plan
Committee

- Vision
- Downtown Area Plan

Operations and Budget

Business stakeholders were clear that the Partnership should remain "lean and mean" in its approach and that the formation of a new bureaucracy would not be desirable. Balancing this concern with the day-to-day demands of running an effective downtown membership organization, the following operational parameters are recommended for the Partnership's initial "start-up" period:

Personnel: A two person staff is recommended, including an executive director and an administrative assistant. The executive director would be sought from a downtown management or chamber of commerce organization in a similarly sized market. An entrepreneurial orientation would be desirable, since the executive director would be charged with building a new organization.

Office: Rent, furniture, fixture and equipment requirements could be partially offset by donations from Partnership members.

Marketing: A modest start-up marketing budget is proposed, including an allowance for a monthly membership newsletter.

Recommended Year 1 Partnership Operating Budget

Personnel				
Executive Director	$	55,000		
Administrative Assistant		25,000		
Taxes/Insurance at 15%		12,000		
Total Personnel			**$**	**92,000**
Office				
Rent	$	10,000		
FF&E, Operations		15,000		
Total Office			**$**	**25,000**
Marketing				
Newsletter (Monthly)	$	15,000		
Program Expense		15,000		
Total Marketing			**$**	**30,000**
Total			**$**	**147,000**

Revenues

Downtown management organizations are typically financed through a variety of revenue sources, including the following:

- membership dues;
- special event revenues;
- publication and service fees;
- government contracts;
- property and/or business tax assessments;
- corporate and foundation grants;
- development fees.

Two sources of revenues are recommended for the Partnership:

Membership Dues: Voluntary membership dues would be tiered to reflect different variables within selected business categories. Generally, the smaller the business, the lower the assessment of voluntary dues. A dues range of $250 to $8,000 would be consistent with downtown markets of similar size.

An initial membership goal of 100 businesses and $100,000 is recommended.

City Matching Funds: It is not unusual for local governments to provide matching or supportive funding for the initiation of a downtown management organization. A successful downtown organization can benefit the City directly by enhancing the tax base, fortifying the delivery of basic services and establishing a tradition of public/private partnerships. A strong downtown core is essential to the long term health of Las Vegas, particularly since most of the area's gaming, business and residential growth is currently occurring in areas outside of the City limits.

A City sponsored match program is recommended for the first three years of the revitalized Partnership Sources of City funds include community development block grants, local general funds and others.

Next Steps

A six-month transitional timetable is recommended to advance the Partnership into a new era:

June through October

A 12 to 15 member **Steering Committee** is suggested to guide the transition of the Partnership from its current limited scope to a broad-based holistic downtown organization. Steering Committee members should reflect the professional diversity of Downtown and have direct business and/or property ownership interests. The Steering Committee would be responsible for completing the following three tasks during the first 4 months:

- **Recruit 100 New Partnership Members and Secure $100,000 in Dues Pledges:** This task requires the Partnership staff to prepare a recommended dues schedule and basic collateral material, such as a Partnership brochure.

- **Resolve Organizational Issues:** The following organizational issues need to be addressed by the Steering Committee:

    a. By-laws: New by-laws need to be developed for the Partnership to reflect the organization's new membership structure and goal of inclusiveness.

    b. Name: Focus group and workshop participants generally agreed that a new name would be desirable for the DPA. It was observed that the organization's transition to predominately gaming interests in 1990 had created some undesirable "baggage" for the organization in the broader business community. Name suggestions include *"Downtown Las Vegas Partnership"* or *"Downtown Las Vegas Association"*. It is recommended that "Downtown" remain prominent in a new organizational name.

    c. Interim Office: Interim logistical issues for the new organization need to be resolved by the Steering Committee, including office location, meeting place, phone, etc.

- **Monitor and Guide Working Committees:** From the focus group and workshop participants, volunteers stepped forward to initiate the suggested economic development and public safety committees. The Steering Committee will need to take an active role in monitoring the progress of these efforts to insure that they remain focused and productive.

October through December

Once $100,000 in dues pledges have been secured, the Steering Committee should begin recruitment efforts for a new **Downtown Las Vegas Partnership Executive Director**. Assistance in developing a job description and coordinating a regional search effort can be obtained from the International Downtown Association.

Following the selection of the executive director, the steering committee should execute a management agreement with the director outlining measurable goals in membership, revenue, programs and other relevant areas.

January 1, 1995 and beyond

To complete the six month transitional period, the membership of the Partnership would elect its permanent board of directors and dissolve the steering committee.

Role of the Casinos

To complete the organizational assessment of the DPA, the consultant and DPA staff met with the existing DPA board of directors to present the preceding recommendations. The existing DPA board, which represents Downtown's ten major gaming and hotel interests, expressed guarded optimism toward expansion of the new Downtown Las Vegas Partnership with two concerns:

- The existing DPA board wants to minimize the potential for conflict between gaming and non-gaming business interests. The new Partnership should not grow to be at odds with gaming interests, but should work toward solutions on Downtown-wide issues that will benefit all Downtown stakeholders, including the casinos.

- The existing DPA board has provided 100% financial support for the organization since 1990. Boardmembers are now investing $18 million in equity in the Fremont Street Experience (FSE) and ongoing operational support for the FSE LLC. There was some skepticism with regard to the broader business community's willingness to financially support its share of a revitalized Partnership. The existing DPA board requested evidence of the broader business community's financial commitment (i.e. dues pledges) before committing to its share of the financial burden.

To mitigate the gaming industry's concerns and address issues identified by the focus group and workshop participants, the consultant and DPA staff recommend the following roles for Downtown's larger gaming interests:

Casinos Should Be Individual Dues-Paying Members of the Partnership: Reflective of their pivotal role in the Downtown economy, the casinos should remain as dues-paying members of the Partnership. As members, the casinos will be positioned as partners in the Partnership and as an influential constituency for shaping advocacy, policy and planning.

Establish A Formal Board Link Between the Partnership and FSE: The FSE should hold a permanent position on the Partnership board to insure that both groups are communicating effectively and maximizing opportunities for collaboration.

Provide Interim Staff Support: Interim staff support should continue to be provided for the Partnership during the anticipated six month transitional period.

Exhibits

1. Survey Instrument
2. Summary of Individual Focus Groups

PROGRESSIVE URBAN
MANAGEMENT ASSOCIATES

P.U.M.A.

1616 SEVENTEENTH STREET

UITE 262

NVER COLORADO 80202

LEPHONE 303/628 5554

X 303/628 5557

Downtown Progress Association
Future Priorities Survey

The Downtown Progress Association (DPA) is currently assessing its options for serving the needs of Downtown Las Vegas beyond the Fremont Street corridor. As a downtown business and/or property owner, DPA is seeking to serve your interests. This survey aims to establish your priorities for an expanded downtown management organization and your willingness to pay for new services.

The following 12 functions are undertaken by downtown associations throughout the nation. Please list your top priorities, in 1-2-3... order, for services that should be provided in Downtown Las Vegas. Remember that the more services that are provided, the more you might have to pay. List only the priorities that you are willing to pay for. You may elect to list less than 12.

_____ **Maintenance**
Sweeping/Cleaning
Trash pick up
Maintain amenities
Graffiti removal

_____ **Security**
Provide patrols (in addition to City)
Coordinate private security
Mounted patrols
Community watch program

_____ **Streetscape Improvements**
Directional/promotional signage
Lighting
Benches & other amenities

_____ **Parking/Transportation**
Parking validation
Parking management
Localized transit/shuttle
Additional parking
Bus stops/shelters

_____ **Marketing & Promotions**
Downtown identity/positioning
Collaborative retail marketing
Special promotions
Banners
Market research
Public market
Pushcart program

_____ **Special Events**
Ongoing special event plan
Festival management

_____ **Economic Development**
Market research
Business retention & recruitment
Small business support
Housing support
Neighborhood linkage

_____ **Advocacy/Communications**
City/State/Federal
Community relations
Disseminate information
Issue forums/briefings

_____ **Cultural Arts**
Arts district management
Special arts events
Public art programs

_____ **Planning & Development**
Project plans
Vision/strategic plan
Design assistance
Development assistance & financing
Parks/open space
Historic preservation

_____ **Social Services**
Homelessness
Anti-panhandling program
Job training/placement

_____ **Employee Services**
Day care
Parking/transit

GROUP ONE: FINANCE & LEGAL

Richard Etter, Bank of America
Jim Howard, First Interstate Bank
Kristin McMillan, Lionel Sawyer & Collins
Steven Qualls, Nevada State Bank
Toni Ross, Thorndale, Backus, Armstrong & Balkenbush
Nancy Somers, Thorndale, Backus, Armstrong & Balkenbush

STRENGTHS:

- Incredible potential
    - upgrade opportunities
- Local government support (though lacking leadership)
    - location of facilities
- Freeway access
- Financial institutions
- Tourism/casinos

WEAKNESSES:

- Aesthetics
    - buildings in disrepair
    - streetscape in disrepair
- Lack of employee services such as day care and business services
    - restaurants
    - retail stores
- Lack of consistency
    - zoning
    - image
- Safety (perception?)
- Desolate off of Freemont after 5 p.m.
- Parking availability
- Lack of class "A" space
- Casinos overshadow other business needs
    - possibility for coexistence?
- Panhandling
- Lack of political will to make hard decisions

ISSUES:

- Casinos cannot drive this organization
- Costs versus value
- Legislative issues
- Progress fatigue - Just Do It!

FINANCE & LEGAL CONT.

PRIORITIES:

Priority/Activity	Average Survey Ranking
1. Advocacy/Communications	3.6
2. Planning & Development	4.0
3. Social Services	6.6
4. Streetscape Improvements	8.0
5. Security	8.2
6. Maintenance	10.0
7. Economic Development	10.2
8. Parking/Transportation	12.0
8. Marketing & Promotions	12.0
8. Special Events	12.0
8. Cultural Arts	12.0
8. Employee Services	12.0

GROUP TWO: REAL ESTATE & CONSTRUCTION

Keith Bassett, Realty Holdings
Tom Czehowski, Steel Engineers
Chuck Mack, The Mack Company
Matt Pearson, Fidelity National Title Agency
Beth Rossum, Rossum Realty
Bill Rossum, Rossum Realty
Woody Rossum, Rossum Realty
Rick Truesdale, Cornerstone Group
Judi Woodyard, Lee & Associates
Jackie Gunn, Lee & Associates
Mike Hensel, Lee & Associates
Chuck Winters, Lee & Associates

STRENGTHS:

County government presence/courts/legal
Freeway access
Central location
Commitment of casinos
  - money
  - ideas
  - motivation

City commitment/political

WEAKNESSES:

Fringe decay
  - commercial
  - residential

Image of decline
Safety (perception)
Reality of panhanlders/hawkers
Parking availability
No sense of CBD
Transit underutilized
One dimensional attraction
  - lights & gambling

Retail mix
Some erosion in economic base
Casinos unwilling to upgrade(?)
Lack of quality residential/mixed use

REAL ESTATE & CONSTRUCTION CONT.

ISSUES:

Do not want to form new bureaucracy
Capitalize on momentum created by FSE
Need for direction

PRIORITIES:

Priority/Activity	Average Survey Ranking
1. Parking/Transportation	3.4
2. Security	4.4
3. Planning & Development	5.6
4. Maintenance	6.7
5. Marketing & Promotions	7.8
5. Economic Development	7.8
7. Advocacy/Communications	9.1
8. Streetscape Improvements	9.4
9. Special Events	9.8
9. Social Services	9.8
11. Cultural Arts	10.7
12. Employee Services	11.7

GROUP THREE: HOSPITALITY

Joe Collura, Chicago Joe's
Marlene Collura, Chicago Joe's
Mary Kozlowski, Architect
Joanne Piatt, Travelodge
Andre Rochat, Andre's
Albert Steel, Legal Beagle
Jerry White, Long Branch Saloon
Juanita Wilson, Econo Lodge

STRENGTHS:

Hotels close together/pedestrian scale
Locally-owned small businesses
Easy access
Day business/lunch
Casinos

WEAKNESSES:

Concentration of income in small area
Safety (reality & perception)
Run-down appearance
Vagrants & homeless
Lack of control in zoning, licensing
    - porno creep
Residential areas
    - low income demographics
Erosion of business base
Night business/dinner
Regional growth hurting downtown
City Council & Mayor have other priorities
    - squandering money
    - focal point plan never implemented
Metro police <u>not</u> effective
    - not sensitive to businesses
    - need business emergency number

ISSUES:

Casinos not in the driver's seat but on the same level
Casinos as economic mentors
Avoid segregation of FSE & DPA

HOSPITALITY CONT.

PRIORITIES:

Priority/Activity	Average Survey Ranking
1. Streetscape Improvements	4.8
2. Economic Development	7.0
3. Social Services	7.3
4. Planning & Development	8.8
5. Security	10.2
6. Special Events	10.3
6. Advocacy/Communications	10.3
8. Maintenance	12.0
8. Parking/Transportation	12.0
8. Marketing & Promotions	12.0
8. Cultural Arts	12.0
8. Employee Services	12.0

GROUP FOUR: RETAIL & DISTRIBUTION

Juan Del Prado, The World Merchant Importers
Todd Marshall, Marshal-Rousso
Doris Neilsen, Top Unlimited
Urban Neilsen, Top Unlimited
Rich Richardson, Sarret Office Supply Co.

STRENGTHS:

Central location
History
Freeway access
Tourism
Competitive/low pricing
Compactness
Bicycle patrol

WEAKNESSES:

Safety (reality & perception)
- drug trafficking
- gets worse farther from Freemont

Run-down appearance
Code/zoning enforcement
Panhandlers are disruptive to pedestrians
Losing luster as attraction
Locals not coming downtown
Erosion of economic base
City Hall <u>not</u> responsive to small business
- government does not use local contractors/suppliers

Maintenance and security, though getting better, needs expansion
-bicycle patrol

ISSUES:

Avoid dynamic of casinos versus everyone else
-must link casinos and DPA

Opportunity to capitalize on FSE

RETAIL & DISTRIBUTION CONT.

PRIORITIES:

Priority/Activity	Average Survey Ranking
1. Security	2.7
2. Maintenance	4.5
3. Marketing	5.0
3. Economic Development	5.0
5. Planning & Development	7.0
6. Parking/Transportation	7.5
7. Employee Services	8.7
8. Advocacy/Communications	9.7
9. Social Services	10.7
10. Streetscape Improvements	12.0
10. Special Events	12.0
10. Cultural Arts	12.0

GROUP FIVE: MISCELLANEOUS SERVICE

Teresa Alirez, Allright Parking Las Vegas, Inc.
Michael Kathz, Manpower Temporary Services
Larry Spitler, Sprint/Centel

PERCEIVED STRENGTHS:

Freeway access/location
City/County/Fed offices
Casinos/hotels (upgraded ones)

PERCEIVED WEAKNESSES:

Disruptive elements
 - panhandling
 - vandalism
 - homelessness
Safety (real & perceived)
 - concern heightened in the p.m.
Parking availability
Lack of shopping for workforce
Dirty streets
Run-down buildings
Declining image

PRIORITIES:

Priority/Activity	Average Survey Ranking
1. Parking/Transportation	6.0
1. Planning & Development	6.0
3. Security	6.8
4. Maintenance	8.2
5. Marketing & Promotions	8.6
5. Social Services	8.6
7. Employee Services	9.4
8. Economic Development	10.0
9. Streetscape Improvements	10.4
10. Cultural Arts	10.6
10. Special Events	10.6
12. Advocacy/Communications	12.0

Fremont Street Experience

Strip Visitor Intercept Study

June 1994

Background/Objectives

The *Fremont Street Experience* intercept study was conducted in Las Vegas in May/June 1994 to gauge the current perception of downtown Las Vegas among current Las Vegas visitors.

Method

A random intercept interview was conducted at multiple Strip locations in Las Vegas.

Sample Considerations

A sample of 177 respondents was completed representing more than 150 zip codes in the United States as well as Canadian and other foreign country visitors. A qualified respondent was:

- a male of female adult over 21.
- a visitor to Las Vegas.
- familiar with downtown Las Vegas
    - visited downtown Las Vegas this trip.
    - visited downtown Las Vegas in the past, but not this trip.
    - but has never visited downtown Las Vegas.

While a majority of Strip respondents viewed downtown Las Vegas favorably, a substantial minority viewed downtown Las Vegas negatively.

	Positive Net %	Negative Net %
Never visited	75	34
Visited this trip	66	42

A perceived lack of safety is a verbalized concern among these respondents with negative reactions.

	Never Visited %	Visited This Trip %
Dangerous at night	14	6
Shabby/dirty	6	14
Scared to go there	8	4
Street people/bums	4	10

Strip Visitor Intercept Study, June 1994

Those who visited downtown Las Vegas in the past cited the following reasons for *not* visiting downtown on this trip.

- More to do on the Strip.

- Downtown
  - is sleazy/seedy/dirty.
  - has people they don't like/panhandlers.
  - is not safe/too scary/has high crime rate.

Strip Visitor Intercept Study, June 1994

While most respondents indicated a likelihood to visit downtown Las Vegas, 1 out of 4 said it was unlikely they would visit in the future. This is a relatively high percentage of rejections after trial.

	Never Visited %	Visited This Trip %	Visited In Past %
Likely	72	68	61
Unlikely	24	24	29

Strip Visitor Intercept Study, June 1994

The general perception of downtown Las Vegas is that it is an adult experience that is:

- easily accessible.
- for serious gamblers.
- a place tourists should see.

There is a concern that downtown Las Vegas has a problem with:

- looking run down.
- panhandling.
- pamphlet distribution.
- crime.
- vagrancy.
- charity solicitation.

Downtown Las Vegas is *not* perceived to be a place:

- to just take a walk.
- of entertainment for the family.

Strip Visitor Intercept Study, June 1994

They cited the following elements as favorable in downtown Las Vegas.

	Never Visited %	Visited This Trip %
Lights/bright Lights	20	10
Movies/seen in movies	18	2
Better pay off	16	10
Lots of good gambling	14	4
Action/lots to do/exciting	11	6
Original Vegas/old Vegas	10	2
Things walking distance	10	8

Strip Visitor Intercept Study, June 1994

Completely Agree (10) to Completely Disagree (1)

	Never Visited	Visited This Trip	Visited In Past
Is easy to get to	8.4	8.3	8.4
For serious gamblers	8.4	7.6	7.8
Tourists should see	8.4	7.4	7.9
Pleasant to visit	7.5	7.5	7.7
Well protected by police	7.5	6.6	7.4
Is safe	6.7	6.4	7.1
Is clean	6.4	6.7	6.7
Is the real Las Vegas	7.0	5.7	6.7
A place to find bargains	6.0	6.5	5.5
Not a place to go alone	5.4	5.3	6.0
Looks run down	5.4	5.5	5.7
A panhandling problem	5.2	5.4	5.7
Problem w/pamphlet distr.	5.2	5.2	5.8
Has a crime problem	4.8	5.8	5.5
A problem with vagrants	5.1	5.3	5.7
Problem w/charity soliciting	4.6	4.8	5.4
A place to take a walk	4.6	4.2	4.7
Entertainment for family	3.3	3.6	3.8

Strip Visitor Intercept Study, June 1994

Word of mouth is the main source of learning about downtown Las Vegas among those who *never visited* downtown Las Vegas.

Friend	67%
Television	31%
Relative	28%
Neighbor	9%
Movies	9%

Strip Visitor Intercept Study, June 1994

Our sample of respondents were comparable to the typical Las Vegas tourist profile provided by the Las Vegas Convention and Visitors Authority.

Mean Age	46 years
Mean Income	$51,000/year
Median Gaming Budget	$500
Median Nights Stay In Vegas	4

These respondents were primarily air visitors into Las Vegas.

	Never Visited	Visited This Trip	Visited In Past
Airplane	77%	71%	74%
Car	16%	26%	20%

Strip Visitor Intercept Study, June 1994

Opportunity

Downtown

The new downtown Las Vegas could be well served by positioning itself as an easily accessible, adult tourist attraction emphasizing serious gambling and "The Real Las Vegas."

MM
R/C
Meczka Marketing / Research / Consulting

PREPARED FOR

FREMONT STREET EXPERIENCE

NAME EVALUATION

QUALITATIVE STUDY

FEBRUARY, 1994

PREPARED BY

MECZKA MARKETING/RESEARCH/CONSULTING

SUMMARY REPORT

Lobby Level / 5757 West Century Blvd. / Los Angeles, California 90045 / (310) 670-4824 / Fax (310) 410-0780

NAME EVALUATION QUALITATIVE STUDY

OBJECTIVE

The primary objective of this study is to qualitatively evaluate the perception of proposed names for the project known as The Fremont Street Experience among target market local Las Vegas area residents and primary feeder market (Southern California) customers.

METHOD

A series of four qualitative focus groups were conducted with local Las Vegas area residents at the Golden Nugget Hotel / Casino on Wednesday, January 12, 1994.

A series of three qualitative focus group were conducted with Southern California residents at MM/R/C on Thursday, February 10, 1994.

Michael A. Meczka personally moderated each of the groups. Kathilynne Carpenter, Executive Director, and Robert J. Naugle, Jr., Special Projects Coordinator, of The Fremont Street Experience attended each session.

PARTICIPANTS

Each group was attended by 9-11 participants who were randomly recruited by telephone from the Los Angeles office of Meczka Marketing/ Research/Consulting. Each group lasted approximately two hours and each respondent received a $40 cash incentive for participation.

Each participant met the following qualifications:

- Local Las Vegas area resident or Southern California resident and
- Visited casinos regularly.

CAUTION ON GENERALIZATION

It is customary to raise a caution concerning the limitations on generalization from any qualitative research data. The small sample must not be considered statistically representative of its assumed universe.

Thus, these findings should be viewed primarily as reflecting a comprehensive analysis of qualitative data offering hypotheses on the attitudes and habits of local Las Vegas area residents and Southern California who are primarily frequent gaming customers.

Verification of these hypothesis would require the application of quantitative techniques.

SUMMARY OF OBSERVATIONS

- The primary objective of this project was to determine the viability of the name *"Fremont Street Experience"* as well as to explore appropriateness of several proposed name alternatives for this project.

  Respondents, both local and feeder market, indicated the naming of the project to be secondary to the implied project benefits - safety and security provided in a well-lit controlled environment.

  > *"I'll certainly feel safer with all those lights."*
  >
  > *"There is safety in numbers. Seeing other people like my self in the area will make me fell better."*

- The popular perception of "downtown Las Vegas," among both local and feeder market patrons, is negative and not dissimilar from traditional concerns of decaying downtowns across the country.

  > *"Old" "Second-rate" "Tired" "Used" "Dirty" "Pan-handlers" "Not safe" "I won't go there after dark."*

- Locals define downtown as both a place to take care of city, county business in the various city, county and state offices as well as a place to gamble. Each,obviously, in a different, but adjacent, areas of downtown. Thus, the generic use of downtown with a name for this project should probably include Fremont Street as a designator to minimize confusion and redundancy among locals. An analogy would be "Third Street Promenade" not just "Santa Monica" or "Rodeo Drive" not just Beverly Hills.

o This is far more a project-development, marketing-execution issue than a naming issue. We have a classic case of declining share in the original area as the entire market area is expanding. This is the same resulting principle as any downtown declines when suburban sprawl with resulting malls are developed. In Las Vegas's case the product is gaming-entertainment and the malls are the expanding strip properties.

o The project's by-product benefits - safety, security, well-lit, controlled environment - directly satisfies the consumer's needs. The sky-vault entertainment entity is secondary and the name tertiary. This was validated in both the Las Vegas and Los Angeles sessions. The primary reason for visiting "downtown" is to gamble which was verbalized time and again by both locals and feeder market customers.

> *"Clean it (downtown) up. Make it safer and I'll probably go there."*
>
> *"Entertainment to me is gambling. My entertainment is inside the casino, playing the games."*

o Locals reached consensus that any name, marketed properly, would work for this project among locals. Local specific locator - "On Fremont Street" - would be acceptable but were also quick to point out that parts of Fremont Street away from downtown are not particularly desirable.

o Los Angles customers also felt any name would work but were more inclined to "Fremont Street Experience" as an all-encompassing descriptor of what is planned for the area. There was mixed opinions regarding use of "downtown" as a locator given the negative connotation of the word.

o No strong preference for any one name was present.

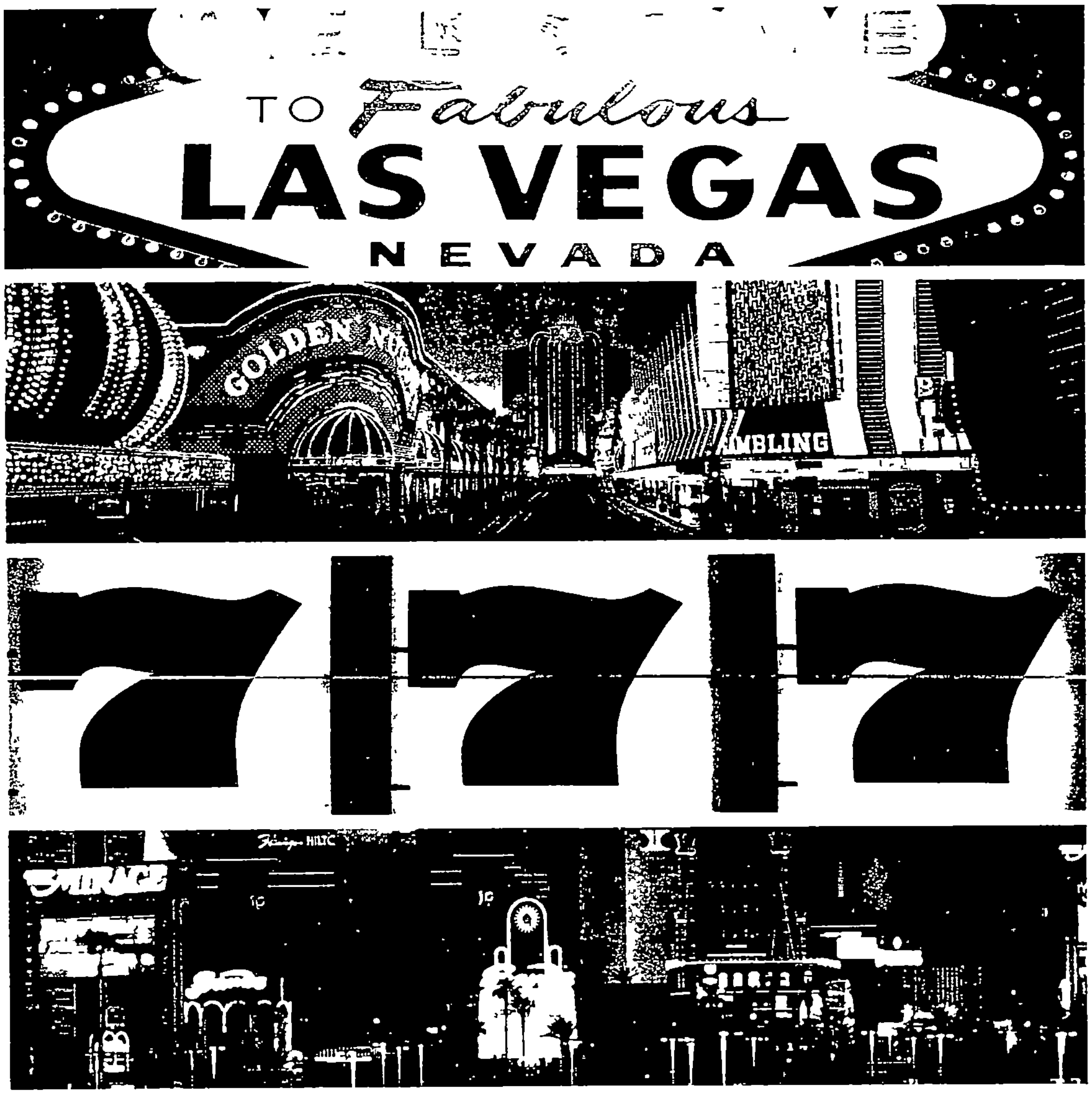
o "Fremont Street Experience" and "Fremont Place" were generally accepted by most respondents.

o Other names considered, in general order of acceptability, were

City of Lights
Light Walk
Skylight Mall
Skysphere
Galaxy
SkyVault
VegaVault
Wonderdome
CityTrek
The Vault
Light Street
Illumnia

o The name of the project is a secondary concern to consumers. The project benefits - safety, security, lighting, controlled environment - are the true consumer benefits of this project. These benefits seem to have greater importance to the consumer and greater impact on consumer behavior than the entertainment portion of this project.

CLARK COUNTY RESIDENTS STUDY 1991-92



LAS VEGAS CONVENTION AND VISITORS AUTHORITY

CONDUCTED BY GLS RESEARCH, 1991/92

69. Do you ever stay over night in local hotels or motels in Las Vegas?

YES	15%
NO	85
NOT SURE/DK	0
REFUSED/NA	1

70. Most people think of themselves as belonging to a particular ethnic or racial group What ethnic or racial group are you a member of? (ASK ONLY IF NECESSARY· Are you white, Black, Asian, Hispanic or Latino -- or of some other ethnic or racial background?)

WHITE	81%
BLACK	7
ASIAN	2
HISPANIC/LATINO	5
NATIVE AMERICAN	1
OTHER	1
NOT SURE/DK	0
REFUSED/NA	3

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

AGE 43 3 (MEAN)

NOTE: 99 = REFUSED/NA

(IF RESPONDENT REFUSES TO STATE AGE, ASK.)

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

18 to 21	3%
22 to 29	21
30 to 39	24
40 to 49	19
50 to 59	12
60 to 64	6
65 and older	14
REFUSED/NA	2

72. Please tell me which one of the following categories includes your total household income before taxes last year. Include your own income and that of any member of your immediate household who is living with you Was it... (READ LIST)

Less than $10,000	7%
$10,000 to $19,999	14
$20,000 to $29,999	20
$30,000 to $39,999	16
$40,000 to $49,999	11
$50,000 to $59,999	7
$60,000 to $69,999	4
$70,000 to $79,999	3
$80,000 to $99,999	2
$100,000 or more	3
NOT SURE/DK	3
REFUSED/NA	11

* * * * * * * * * * * * * * *

My supervisor may be calling you to confirm that this interview took place May I have your first name and telephone number so she can call and ask for you?

Name ____________________ Telephone # (from sample) ____________________

That's all the questions I have Thank you very much for participating in the survey

ON FIRST PAGE: CALCULATE AND RECORD INTERVIEW LENGTH. RECORD GENDER.

I AFFIRM THAT THE ABOVE INFORMATION IS ACCURATELY RECORDED FROM THE RESPONDENT'S STATEMENTS.

Interviewer's Signature ____________________ Date ____________________

ACKNOWLEDGEMENT

The Las Vegas Convention and Visitors Authority and GLS Research wish to thank the residents of Clark County for their cooperation on this research project.

CLARK COUNTY RESIDENTS STUDY SPONSORING AUTHORITY

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RESEARCH OVERVIEW

INTRODUCTION

For several years, R&R Advertising and the Las Vegas Convention and Visitors Authority (LVCVA) have been conducting ongoing surveys to determine the opinions, attitudes, and behavior of all Americans -- visitors and non-visitors alike -- toward Las Vegas. While the data from those studies has yielded valuable national and regional information, they have produced almost no information concerning attitudes and behavior of local (Clark County) residents.

Consequently, the LVCVA asked GLS Research to conduct a survey of Clark County residents to investigate the following topics:

- What Clark County residents do with their leisure time and the importance of gambling in relation to other leisure activities.
- The opinions and behavior of Clark County residents in relation to gambling, casino entertainment, and local restaurants.
- Activities of Clark County residents outside of casinos.

A detailed analysis of the findings of the 1991-92 study of Clark County residents is presented after a brief discussion of the study methodology.

METHODOLOGY

GLS Research conducted telephone interviews with 1,200 respondents selected at random from a random-digit-dial sample of Clark County, Nevada households. To account for any seasonal differences in response patterns, interviewing was conducted in four waves of 300 interviews each in August and November 1991 and February and May 1992.

The margin of error for the 1,200 respondent sample is ± 2.8% at the 95% level of confidence. That is, if this survey were to be repeated exactly as it was originally conducted, then 95 times out of 100 the responses from the sample (expressed as proportions) would be within 2.8% of the actual population proportions.

The data analysis consisted of developing statistical profiles of the attitudes, opinions, and perceptions of respondents and identifying statistically significant subgroup differences in response patterns among respondents.

Details on the findings and conclusions of the survey are presented in the following sections of this report.

RESEARCH HIGHLIGHTS

The Las Vegas Convention and Visitors Authority (LVCVA) asked GLS Research to design a quantitative study for the purpose of investigating the leisure time activities of Clark County residents and their attitudes, opinions, and behavior with regard to gambling and other casino-related activities.

The study consisted of 1,200 interviews with Clark County residents who were randomly selected from a random-digit-dial sample of all Clark County households. The margin of error for the 1,200 respondents is ± 2.8% at the 95% level of confidence. Statistical analyses of the data were performed, and statistically significant subgroup differences in response patterns among respondents were identified.

Following are highlights of the findings of this study of Clark County residents:

Gambling

- *Gambling ranked high among activities in which Clark County residents participate.* It ranked second among activities in which residents said they participated. Only eating out was mentioned by a larger proportion of residents. Gambling was second among activities done "most often" and tied for first (with eating out) among "favorite" activities.
- Two-thirds of Clark County residents (66%) gamble at least occasionally.
- One-half of those who gamble (50%) do so at least once a week.
- Two-thirds of gamblers (67%) budget less than $25.00 per visit for gambling, but 33% budget $25.00 or more per visit -- with 14% budgeting $25.00 to $49.00 and 19% budgeting $50.00 or more.

- Video games (played most often by 53% of residents who gamble) and slot machines (played most often by 18% of residents who gamble) proved to be the most popular games.

- Women were much more likely than men to say they played video poker and slot machines most often. Men were far more likely than women to say they played blackjack, poker, and racebook/sportsbook most often.

- Video poker was most popular with those under the age of 50. Slot machines were most popular with those 50 years old or older.

- As one would expect, residents with lower gambling budgets are more likely to play video poker and slot machines most often. Those with gambling budgets of $50 or more per visit, however, are more likely to play blackjack, poker, craps, and "other" games most often.

- Three-quarters of those who play video games or slot machines play the quarter machines most often, and more than four in ten video/slot machine players insert five coins per play.

- Among table game players (most frequently blackjack, poker, Big 6, or craps), 34% play a table minimum of $5.00 most often, and an equal proportion (34%) play a minimum of $2.00 to $3.00.

- Among those who played table games, racebook/sportsbook, or "other" games most often, about six in ten (59%) said their average bet was $5.00 or less.

- Among residents who gamble, two in ten (22%) gamble most often on the Strip, 14% gamble Downtown, and 63% gamble outside of the Strip or Downtown.

- Almost one-half of respondents (47%) who do not gamble most often on the Strip said it was because of crowds, traffic, and tourists. Seventeen percent (17%)

said the Strip was inconvenient for them to get to, 7% said they were not that interested in gambling, and 5% said they preferred to gamble in another area.

- Objections to Downtown were similar, with 23% mentioning inconvenience, 22% mentioning crowds and traffic, and 8% saying they preferred another area. However, 7% said they did not go Downtown to gamble because it was dirty or uncomfortable, and another 8% said they did not gamble Downtown because it was not a safe neighborhood.

- Among those who gamble, 23% said they would like to gamble more often. The vast majority of these respondents (88%) said they did not gamble more often because they "can't afford it."

- Only 15% of residents who gamble do so *only* when they have out-of-town visitors, but 85% gamble at other times.

- Seventy-seven percent (69%) of *residents who gamble* (or 45% of *all* residents) do so at least occasionally in a casino.

- Seven in ten respondents who gambled in a casino said they did so at least once a month, with 33% saying once a week or more and 38% saying once or twice a month.

- Those most likely to gamble most frequently in a casino (once a week or more often) are those 65 years old or older, the retired, respondents without children, and those who gamble most often in Downtown Las Vegas.

- Of those who gamble in casinos, three-quarters considered themselves to be either very light or light bettors. Only one-quarter considered themselves to be moderate to heavy bettors.

- Nine percent (9%) of residents who gamble in casinos maintain casino credit.

- It is estimated that nearly one-half of casino gaming trips are to Boulder Highway (25%) or off-Strip (24%) casinos.

Restaurants

- Seven in ten residents who gamble in casinos usually eat in a casino restaurant when they gamble.
- When gambling in a casino, residents are most likely to eat at a buffet (37%) or coffee shop (31%). Two in ten eat most often in a gourmet restaurant.

Gambling Outside Casinos

- About one-half of all gamblers (51%) said they gambled in a convenience store, grocery store, or gas station. Among those who gamble in these locations, 52% said they did so once a week or more, 36% said once or twice a month, and 11% said four times a year or less.
- Clark County residents who gamble were asked if they ever gambled in a local bar or restaurant, and 35% said they did. Among those who gamble in those locations, 30% said they do so once a week or more, 47% said once or twice a month, and 23% said four times a year or less.
- We also asked gamblers if they ever gambled in Clark County but outside the greater Las Vegas area, and 28% said they did. Residents who gamble outside Las Vegas do not do so frequently: two-thirds (66%) gamble outside Las Vegas only about four times a year or less.
- We asked all Clark County residents we interviewed if they ever buy lottery tickets from a state-run lottery (like the California or Arizona lotteries), and 37% said they had.

Entertainment

- More than six in ten residents (62%) said they have been to a casino show.

  About one-quarter of residents who attend casino shows do so once a month or more. One-quarter attend four times a year, one-quarter go twice a year, and the remainder go once a year or less.

- Two-thirds of all residents who have been to casino shows have attended lounge shows, headliner shows, and large-scale Las Vegas style production shows. About six in ten residents have also attended small-scale revues.

Lake Mead

- Seven in ten respondents said they had been to Lake Mead, and all but 10% of them visited Lake Mead during the past year. Moreover, 38% of those who have visited Lake Mead went there five or more times during the past year.

  Most residents (81%) who visited Lake Mead last year spent only one day there on their last trip to the lake.

- Residents were asked how much they spent on average during their last trip to the Lake. On average they spent of $27.72 on food and drink, $19.40 on gasoline, and $16.35 on "other" expenses.

- Not surprisingly, the Lake Mead activities residents most often engaged in were swimming, boating, sunbathing, and fishing. Water skiing, jet skiing, camping, and hiking were also popular.

Local Air Transportation Use

- We asked Clark County residents how many flights they have made out of McCarran International Airport during the past 12 months. Four in ten Clark County residents (43%) said they had not flown from McCarran during the previous 12 months, 16% had flown once, 12% twice, 16% three to five times, and 13% more than five times.
- The overall average number of flights taken from McCarran during the past 12 months was 3.2.

RESEARCH FINDINGS

LEISURE ACTIVITIES

Overview

We asked all residents to tell us in their own words what activities they took part in during their leisure time over the course of a year. (Residents were instructed to volunteer only activities outside the home which could be done in or around Las Vegas.) Residents were then asked which of the activities they mentioned was the one they did most often and which was their favorite (Table 1).

Gambling ranked high on all measures — second among all activities mentioned (17%), second among activities done most often (7%), and tied for first among favorite activities (6%).

Significantly higher proportions of residents in the following subgroups volunteered gambling as an activity in which they participated. Members of the same subgroups were also much more likely than others to say gambling was their favorite activity:

- Those 65 years old or older and the retired.
- Those who have moved to Las Vegas since 1981.
- Those who gamble Downtown.
- Those with gambling budgets of $25.00 or more per casino visit.

TABLE 1

LEISURE ACTIVITIES OF CLARK COUNTY RESIDENTS

What activities do you take part in during your leisure time?	Activities (volunteered responses)*	Activity done most often**	Favorite activity**
Eating out	19%	8%	6%
Gambling	17	7	6
Movies	16	4	3
Sporting events	13	5	6
Fishing	13	4	5
Swimming	13	3	3
Golf	11	6	5
Sightseeing	11	4	4
Hiking	11	3	4
Community activities	10	6	5
Boating	10	4	3
Bowling	10	4	3
Camping	10	3	4
Shopping	9	4	3
Visiting friends	9	4	3
Picnics	8	1	2
Snow skiing	6	1	2
Water skiing	6	1	2
Working out	5	3	2
Tennis	5	2	2
Cycling	5	2	1
Night clubbing	5	1	1
Hunting/shooting	3	1	1
Bingo	2	1	1
Horseback riding	2	1	1
Sunbathing	2	0	0
Other	0	11	11
No answer	0	8	10

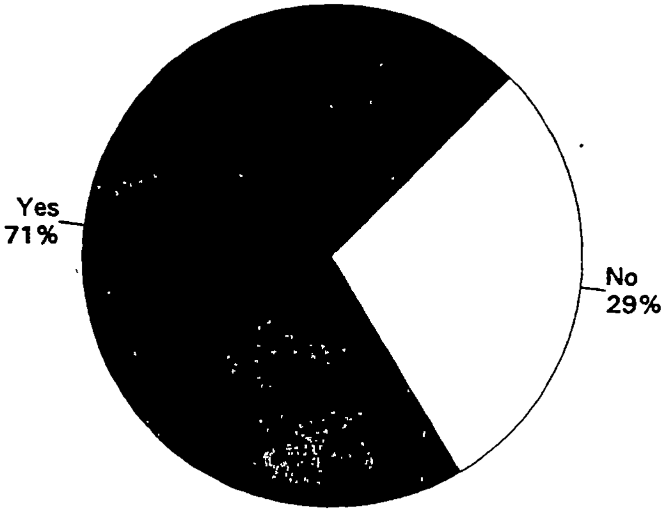
* Residents volunteered up to five activities.

** Only one response was allowed; percentages do not add to 100 because of rounding.

Lake Mead

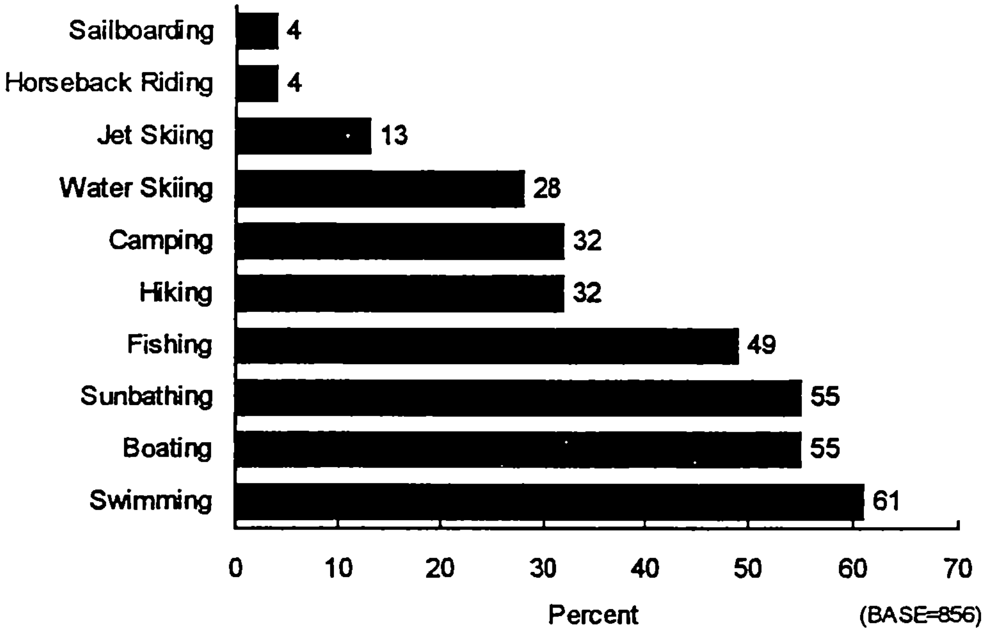
We also asked residents if they had *ever* visited the Lake Mead Recreational Area. Seven in ten residents (71%) said they had (Figure 1).

FIGURE 1
PERCENTAGE OF RESIDENTS
WHO HAVE BEEN TO LAKE MEAD



Residents who have been to Lake Mead were read a list of activities and asked which ones they participated in while at Lake Mead (Figure 2). Six in ten (61%) of the respondents said they went swimming, while more than one-half mentioned boating (55%) and sunbathing (55%), and about one-half mentioned fishing (49%). About three in ten respondents also mentioned camping (32%), hiking (32%) and water skiing (28%) — and 13% of Lake Mead visitors went jet skiing. Relatively few respondents said they went horseback riding (4%), or sailboarding (4%).

FIGURE 2
LAKE MEAD ACTIVITIES
(Among Those Who Visited Lake Mead)

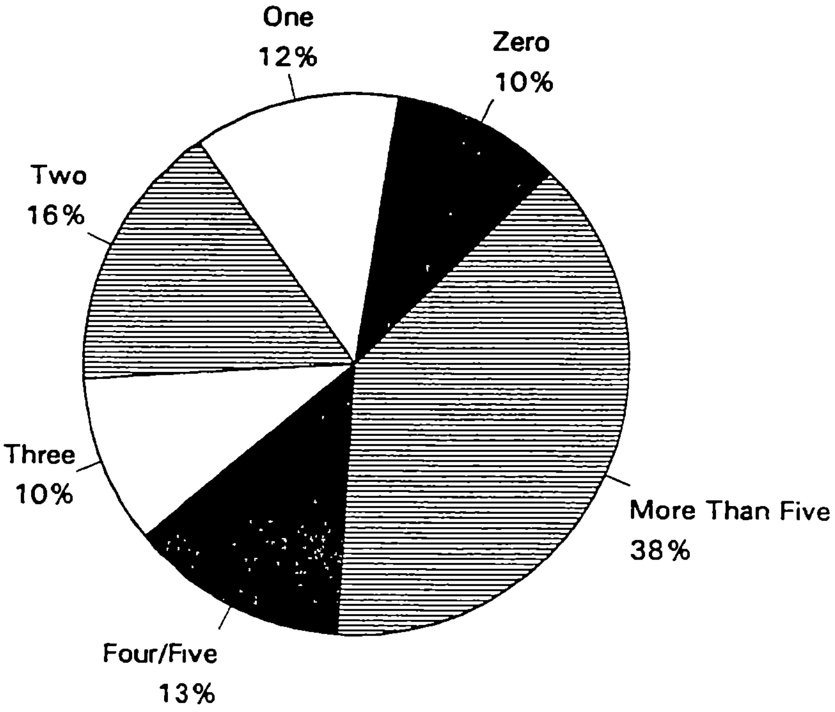


In general, involvement in all the activities listed declined with age, particularly over the age of 55. Other subgroup differences included the following:

- Men were significantly more likely than women to participate in swimming, boating, fishing, camping, water skiing, and jet skiing.
- Significantly higher proportions of residents less than 30 years old (compared to those 30 or older) said they participated in water and jet skiing.
- Significantly higher proportions of single residents (compared to married) said they participated in swimming, boating, sunbathing, water and jet skiing, and sailboarding.

- Significantly higher proportions of renters (as opposed to home owners) said they participated in swimming, sunbathing, hiking, camping, and jet skiing.
- Fishing was the only activity more likely to be mentioned by Clark County residents living outside Las Vegas.

FIGURE 3
NUMBER OF TIMES VISITED LAKE MEAD DURING PAST YEAR

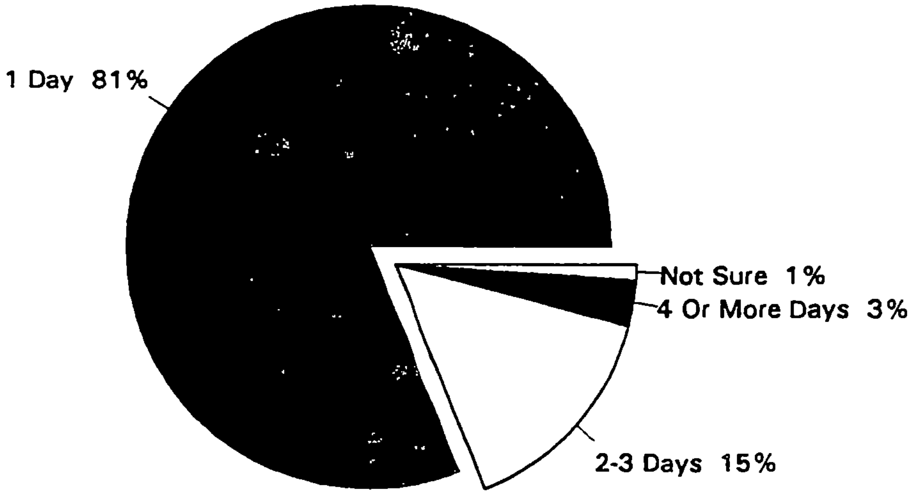


(Base = 856)

We asked residents who had ever been to Lake Mead how many times they visited the lake during the past year (Figure 3). Ten percent (10%) of these respondents said they did not go to Lake Mead at all last year, but 12% had been once, 16% twice, 10% three times, 13% four or five times, and 38% had been more than five times. The average number of visits *among those who went to Lake Mead last year* was 12.2.

FIGURE 4

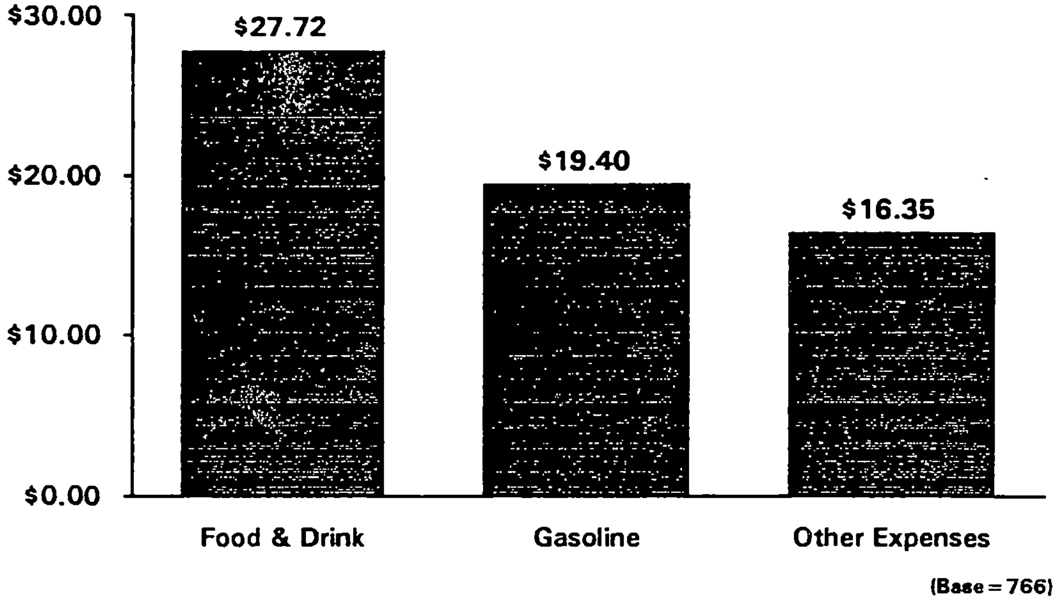
DAYS SPENT AT LAKE MEAD DURING LAST TRIP
(Among Those Who Visited Lake Mead Last Year)



(Base=766)

Residents who actually visited Lake Mead during the past year were asked how many days they spent there on their last trip. Eight in ten respondents (81%) said they spent only one day there, while 15% said they spent two to three days, and only 3% said they spent four or more days (Figure 4).

FIGURE 5
AVERAGE AMOUNT SPENT AT LAKE MEAD ON LAST TRIP



We also asked those Clark County residents who had visited Lake Mead to tell us the approximate total amount they spent *on their last trip to the Lake*. The average (mean) dollar amount spent on food and beverages was $27.72; the average amount spent on gasoline was $19.40; and the average spent on "all other expenses" was $16.35 (Figure 5).

Lake Mead Revenues

The LVCVA asked GLS Research to estimate annual Lake Mead expenditures attributable to Clark County residents who visit the Lake. Using data about the frequency of visits during the past year and the amount spent on food and beverages, gasoline, and all other expenses on their last visit to the lake, it is possible to estimate the annual expenditures as follows:

- Nearly two-thirds (64.3%) of the residents we interviewed said they had visited Lake Mead at least once *during the past year.* The average number of visits to Lake Mead by respondents who visited during the past year was 12.2.

- The average amount spent by these respondents during their last visit to Lake Mead on each of three expenditure categories is given below:

Food and Beverages	$ 27.72
Gasoline (Car and Boat)	19.40
All Other Expenses	16.35

- Annual expenditures on these categories can be estimated by multiplying the amount spent on the last trip *times* the number of trips taken during the past year by that respondent. Summing these calculations over all respondents who took at least one trip to Lake Mead over the past year results in the following annual expenditure estimates for this random sample population of 1,200 Clark County adult residents.

ESTIMATED ANNUAL EXPENDITURES — SAMPLE POPULATION

Food and Beverages	$ 334,416
Gasoline (Car and Boat)	275,850
All Other Expenses	154,912
TOTAL ALL CATEGORIES	$ 765,178

- Clark County has a total estimated adult population (21 years old or older) of 573,000 or 477.5 *times* 1,200 people. The estimated annual amount spent on each of these expenditure categories which is attributable to Clark County residents who visited Lake Mead is simply 477.5 *times* each category. The results of these calculations are presented below:

ESTIMATED ANNUAL EXPENDITURES — TOTAL POPULATION

Food and Beverages	$159,683,640
Gasoline (Car and Boat)	131,718,375
All Other Expenses	73,970,480
TOTAL ALL CATEGORIES	$365,372,495

The accuracy of these annual expenditure estimates are necessarily limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

In the survey respondents were asked to give expenditure data only for their last trip to Lake Mead. The last trip data was preferred over estimates for the entire past year because it was deemed likely that the respondents would be able to give much more accurate last trip expenditure data than they would in trying to sum expenditures over several trips throughout the past year. We then used this data as representative of an *average* trip to Lake Mead in calculating past year expenditures for that respondent.

For some respondents, their last trip to Lake Mead may *not* be representative of their expenditure behavior and we will derive either an over or under estimate of their actual past year expenditures. However, over a relatively large sample of 1,200 respondents we expect that possible over and under estimates will cancel each other out so that the sum of the individual annual expenditure estimates will approach actual annual expenditures for these respondents with some degree of accuracy. While we believe the calculations to be reasonable estimates of past year expenditures, it is possible that our sample population could contain at least some upward or downward bias on actual past year expenditures.

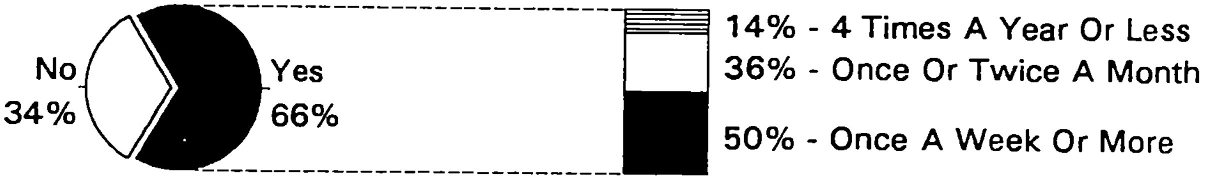
We urge the LVCVA to view these expenditure estimates as indicative of the level of expenditures attributable to Clark County residents who visit the Lake rather than definitive of the actual amounts spent.

GAMBLING

Gambling in General

Two-thirds (66%) of all residents said they gambled at least occasionally, though 34% said they did not (Figure 6).

FIGURE 6
PERCENTAGE OF RESIDENTS WHO GAMBLE AT LEAST OCCASIONALLY AND HOW OFTEN THEY GAMBLE



(Base=795)

We asked all residents who gamble at least occasionally how often they gamble (Figure 6). One-half of these residents (50%) said they gamble once a week or more, more than one-third (36%) gamble once or twice a month, and 14% gamble four times a year or less.

The following respondent subgroups were more likely than others to say they gambled at least once a week:

- Men,
- Respondents with less than a college degree,
- Respondents who work in service occupations or as craftspeople.
- Respondents who work in a casino, and
- Renters.

We asked residents who do not gamble why they don't (Table 2). Over one-half of residents (49%) cited financial reasons, three in ten (30%) said gambling was not interesting to them, and 28% mentioned moral or ethical reasons.

TABLE 2

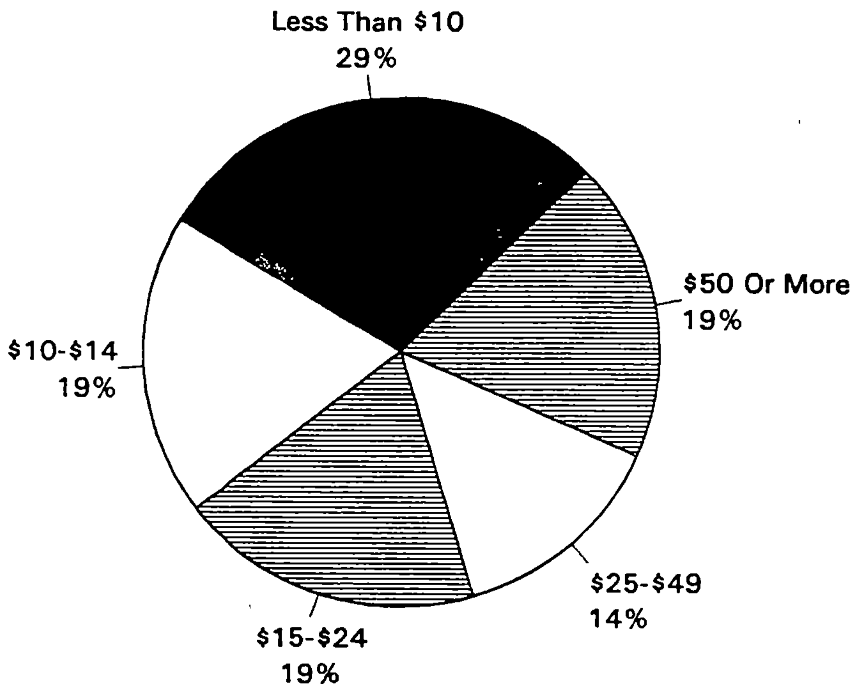
REASONS RESIDENTS DO NOT GAMBLE*

(Among Those Who Do Not Gamble)

	TOTAL
Financial reasons	49%
Don't like losing/wasting money	34
Can't afford it	15
Not interested/it's boring/no fun	30
Moral/ethical reasons	28
Religious objections	16
Don't like the gambling environment	5
It's a bad habit	7
Too risky/odds are against you	10
Not enough time/no time	2
Other	1
BASE	(405)

* Up to two responses were allowed. Percentages represent the combined (first plus second) response.

FIGURE 7
AVERAGE GAMBLING BUDGET
(Among Those Who Gamble And Volunteered Budget Information)



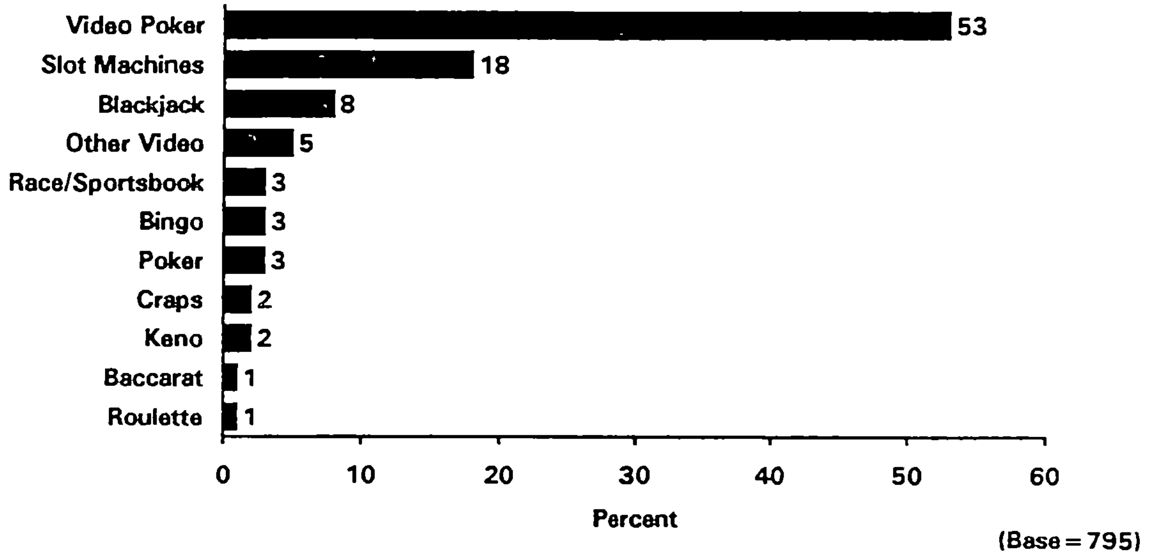
(Base=715)

We asked residents to tell us the average amount they budgeted for gambling for each day they gambled over the course of a year (Figure 7). Among those who responded to the question, 29% said they budgeted less than $10 per day of gambling, 19% said $10 to $14 per day of gambling, 19% said $15 to $24 per day of gambling, 14% said $25 to $49 per day of gambling, and 19% said $50 or more per day of gambling.

With regard to subgroup differences, we see the following:

- Men tended to budget more than women.
- Respondents with children 13 years old or older or with no children tended to budget more than those with children under the age of 13.

FIGURE 8
GAME PLAYED MOST OFTEN
(Among Those Who Gambled)



All residents who gamble at least occasionally were asked what game they played most often. Video poker proved to be extremely popular among Clark County residents — even more popular than slot machines (Figure 8). Specifically, Clark County residents who gamble are most likely to play video poker (53%) and slot machines (18%), followed more distantly by blackjack (8%), video games other than video poker (5%), sportsbook or racebook (3% together), bingo (3%), poker (3%), craps (2%), keno (2%), baccarat (1%), and roulette (1%).

There were several subgroup differences of note:

- Women were much more likely than men to say they played video poker and slot machines most often. Men were far more likely than women to say they played blackjack, poker, and racebook/sportsbook most often.

- Video poker was most popular with those under the age of 50. Slot machines were most popular with those 50 years old or older.

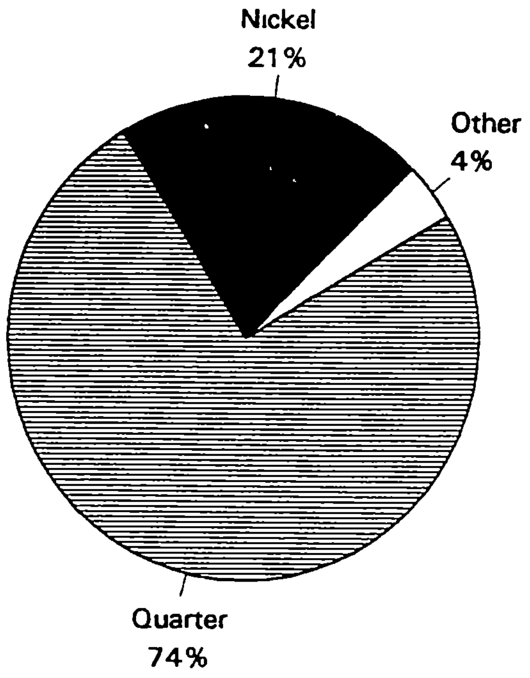
- Single respondents were less likely than others to play slot machines and more likely than others to play blackjack and race/sportsbook.

- As one would expect, respondents with lower gambling budgets were more likely to play video poker and slot machines most often. Those with gambling budgets of $50 or more per visit, however, were more likely to play blackjack, poker, craps, and "other" games most often.

- The popularity of video games was especially strong among those who gamble primarily in the outlying areas, and, to a somewhat lesser degree, among those who gamble in Henderson. A far higher proportion of those who gamble most often on (or near) the Strip than those who gamble elsewhere played slot machines, blackjack, other video machines, race/sportsbook, and poker most often.

FIGURE 9

MACHINE DENOMINATION PLAYED MOST OFTEN (Among Those Who Play Slot And Video Machines Most Often)



(Base = 602)

We next asked residents who played video games and slot machines most often which denomination machine they usually played (Figure 9). By far the greatest preference was for the quarter machines, with 74% of respondents answering that they played them most often. Twenty-one percent (21%) of respondents preferred the nickel machines, and four percent (4%) preferred the all other denominations.

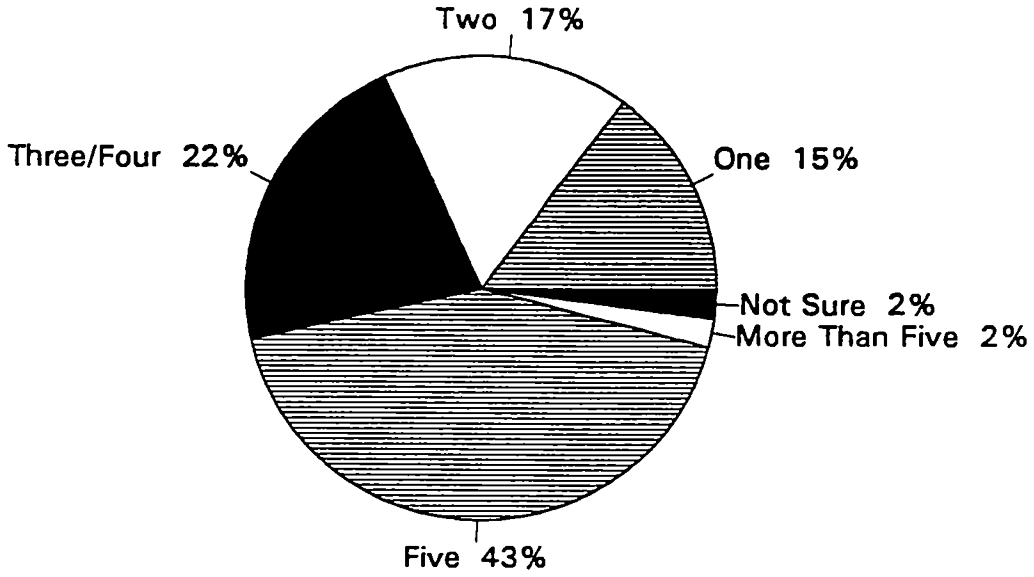
The following are the most noteworthy subgroup differences on this measure:

- Women were more likely than men to use nickel machines, and men were more likely than women to use quarter machines.

- The likelihood of playing nickel machines increases with age, whereas the likelihood of playing quarter machines decreases with age.

- As we would expect, gambling budget is closely related to denomination of slot and video machines played. Those respondents with the smallest gambling budgets (under $15.00) were more likely than those with larger gambling budgets to play the nickel machines. While quarter machines were popular in every budget range, those with gambling budgets of $15.00 or more were more likely to play them.

FIGURE 10
NUMBER OF COINS INSERTED PER PLAY
(Among Those Who Play Slot And Video Machines Most Often)

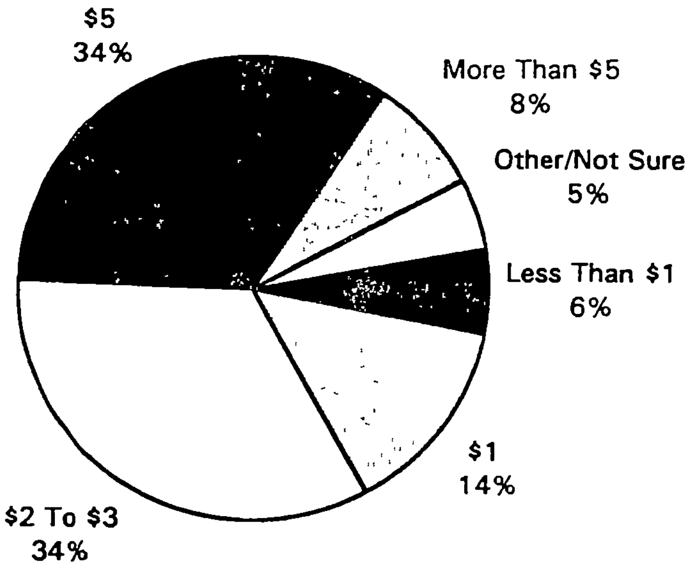


(Base = 602)

More than four in ten (43%) of machine players insert five coins or tokens per play, 22% insert three to four, 17% insert two, and 15% insert one (Figure 10). The *average* number of coins or tokens inserted per play was 3.7.

As expected, the higher the gambling budget, the more likely the respondent is to play five coins at a time; the lower the gambling budget, the more likely the respondent is to play only one coin at a time.

FIGURE 11
TABLE MINIMUM PLAYED MOST OFTEN
(Among Those Who Play Table Games Most Often)

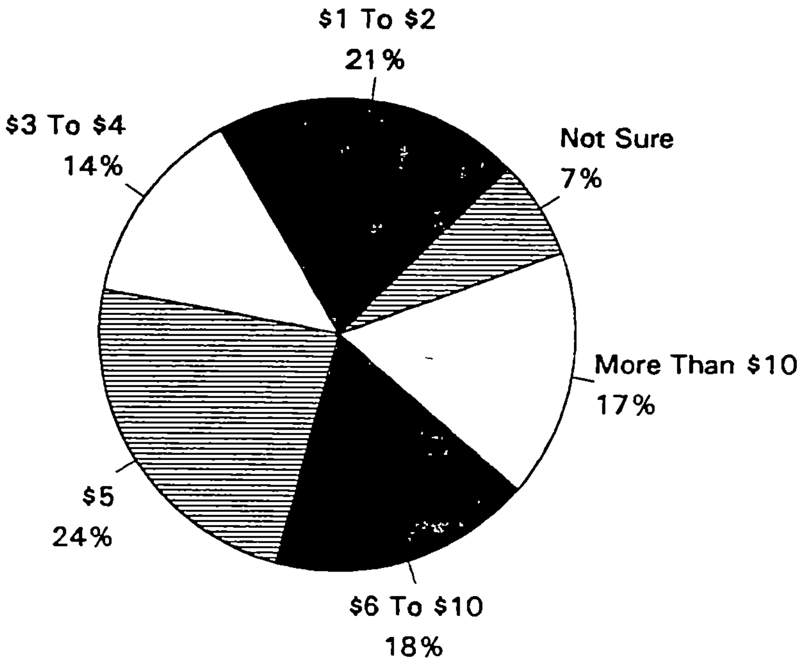


(Base = 116)

We asked residents who said that they play a table game most often to tell us what table minimum they most often played (Figure 11). One-third of table game players (34%) said they played a minimum of $5.00, one-third (34%) said $2.00 or $3.00, 14% said $1.00, and 6% said less than $1.00. Only 8% of table game players said they played a table minimum of more than $5.00.

There were no discernable differences among sample subgroups in the table minimum played most often.

FIGURE 12
AVERAGE BET
(Among Those Who Play Table Games, "Other" Games, And Race/Sportsbook Most Often)

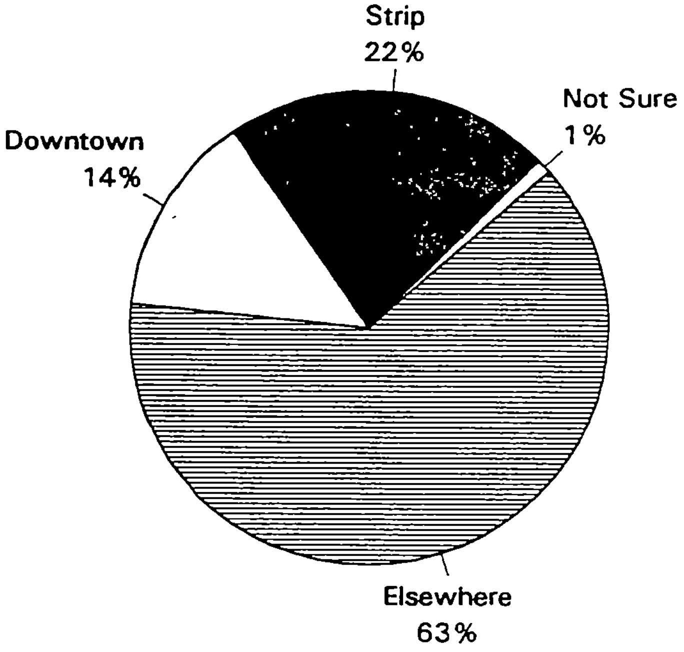


(Base = 149)

We also asked residents who play table games, race/sportbook, and "other" games most often to tell us their average bet (Figure 12). About two in ten of these respondents (21%) said their average bet was $1.00 to $2.00, 14% said $3.00 to $4.00, 24% said $5.00, 18% said $6.00 to $10.00, and 17% said more than $10.00. The *average* (mean) bet was $14.50. (There were too few respondents in this subsample to permit meaningful subgroup analysis.)

We asked respondents who played keno or bingo what their average bet was per session. The *average* (mean) bet was $5.90. Since relatively few residents of Clark County play either keno or bingo, we were unable to obtain a sample of respondents sufficiently large enough to generate statistically meaningful subgroup results with regard to the average bet per keno game or bingo session.

FIGURE 13
WHERE RESIDENTS GAMBLE MOST OFTEN
(Among Those Who Gamble)



(Base = 795)

All residents who gamble were asked where they gambled most often (Figure 13). Two in ten respondents (22%) said they gambled most often on the Strip, while 14% said Downtown and 63% said they gambled outside of the Strip or Downtown.

Residents who did not say they gambled most often on the Strip or Downtown were asked why they did not gamble in those locations (Tables 3 and 4). Almost one-half of respondents (47%) who do not gamble most often on the Strip said it was because of crowds, traffic, and tourists. Seventeen percent (17%) said the Strip was inconvenient for them to get to, 7% said they were not that interested in gambling, and 5% said they preferred to gamble in another area.

Objections to Downtown were similar, with 23% mentioning inconvenience, 22% mentioning crowds and traffic, and 8% saying they preferred another area. However, 7% said they did not go Downtown to gamble because it was dirty or uncomfortable and another 8% said they did not gamble Downtown because it was not a safe neighborhood.

TABLE 3
REASONS RESIDENTS DO NOT GO TO THE STRIP TO GAMBLE

(Among Those Who Do Not Gamble On The Strip)

	TOTAL
Crowds/traffic	48%
Too crowded	25
Too much traffic	13
Too many/don't like tourists	9
Inconvenience (out of the way/hard to get to)	16
Not that interested in gambling	7
Prefer another area	5
Prefer Downtown	3
Prefer another area (not Downtown or the Strip)	2
Can't afford it/money considerations	4
Work for casino/hotel	2
No time	2
Too hard to find parking	1
The Strip is not safe	1
Don't like the casinos/hotels	1
Other	3
Not sure/no answer	7
BASE	(619)

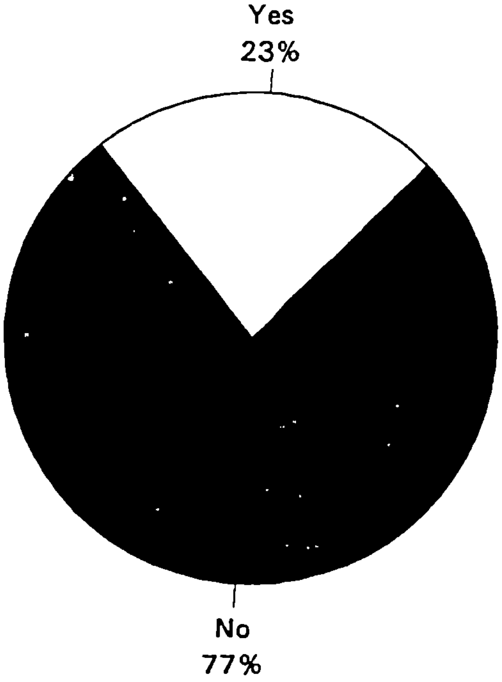
TABLE 4

REASONS RESIDENTS DO NOT GO DOWNTOWN TO GAMBLE

(Among Those Who Do Not Gamble Downtown)

	TOTAL
Inconvenience (out of the way/hard to get to)	23%
Crowds/traffic	22
Too much traffic	7
Too crowded	13
Too many/don't like tourists	2
Other objections to Downtown	15
Don't like Downtown/it's dirty/uncomfortable	7
Not a safe neighborhood	8
Prefer another area	8
Prefer the Strip	5
Prefer another area (not Downtown or the Strip)	3
Not that interested in gambling	7
Can't afford it/money considerations	2
No time	2
The payoff is bad Downtown	2
Other	4
Not sure/no answer	13
BASE	(684)

FIGURE 14
PERCENTAGE OF GAMBLERS WHO WOULD LIKE TO GAMBLE MORE OFTEN



(Base = 795)

Among people who gamble, about two in ten (23%) said they would like to gamble more often (Figure 14).

The notable subgroup differences are as follows:

- Women were more likely than men to say they would like to gamble more often.
- The lower the household income, the more likely a respondent was to express an interest in gambling more often than they do now.

We asked these respondents to tell us in their own words why they do not gamble more often (Table 5). The most frequently mentioned reason by far was that they "can't afford it" (88% of respondents). Some of these respondents also volunteered that they are not lucky (10%) and that they don't have the time to gamble (6%).

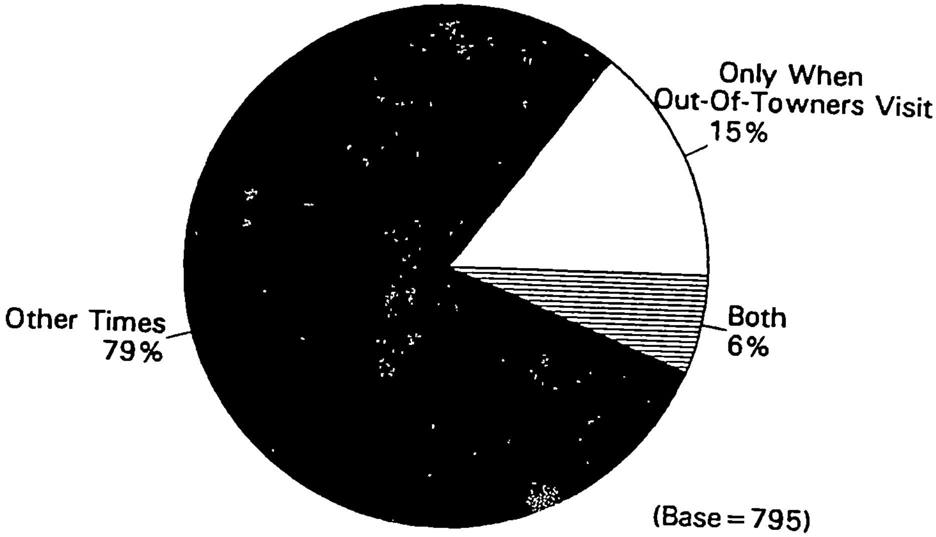
TABLE 5
REASONS RESIDENTS DO NOT GAMBLE MORE OFTEN*

(Among Those Who Do Not Gamble As Often As They Would Like)

	TOTAL
Can't afford it	88%
I'm not lucky/I always lose	10
No time	6
Not interested/don't like gambling that much	3
Don't like gambling that much	2
The crowds	1
Other	4
BASE	(182)

* Up to two responses were allowed. Percentages represent the combined (first plus second) response.

FIGURE 15
WHEN RESIDENTS GAMBLE
(Among Those Who Gamble)



We also asked residents who gamble if they gambled only when they had out-of-town visitors or if they gambled at other times (Figure 12). Fifteen percent (15%) of these respondents said they *only* gambled when they had out-of-town visitors. However, 85% of residents who gamble said they gambled at other times (79%) or at other times *and* when they have out-of-town guests (6%). Looking at subgroup differences, we see the following:

- Residents who gamble primarily on the Strip were more likely than those who gamble elsewhere to say they gambled only when they have out-of-town guests.

- Residents with a college degree were more likely than those with less education to say they gambled only when they have out-of-town guests.

Casino Gambling

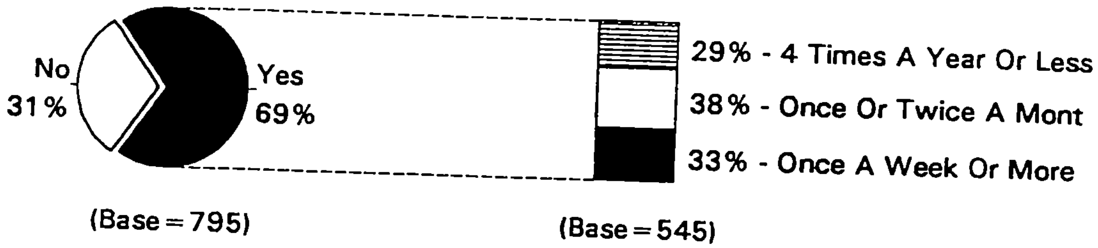
We asked residents who gamble if they ever go to a casino to gamble (Figure 16). Nearly seven in ten (69%) said they did.

Since 66% of all residents gamble, that means 45% of *all* residents sometimes gamble in a casino (that is, 66% times 69%).

With regard to subgroup differences we see the following:

- The likelihood of going to a casino to gamble tends to increase with gambling budget.
- The more recently a resident moved to Las Vegas, the greater the likelihood that they gamble in casinos.
- Residents with at least some college education are more likely than those with less education to gamble in casinos.
- Married and single residents are much more likely than separated, divorced, or widowed residents to gamble in a casino.
- Residents in sales/clerical or professional/technical occupations are more likely than others to gamble in casinos. Those in service jobs are least likely to gamble in casinos.

FIGURE 16
PERCENTAGE OF GAMBLERS
WHO GAMBLE IN CASINOS
AND HOW OFTEN THEY DO SO



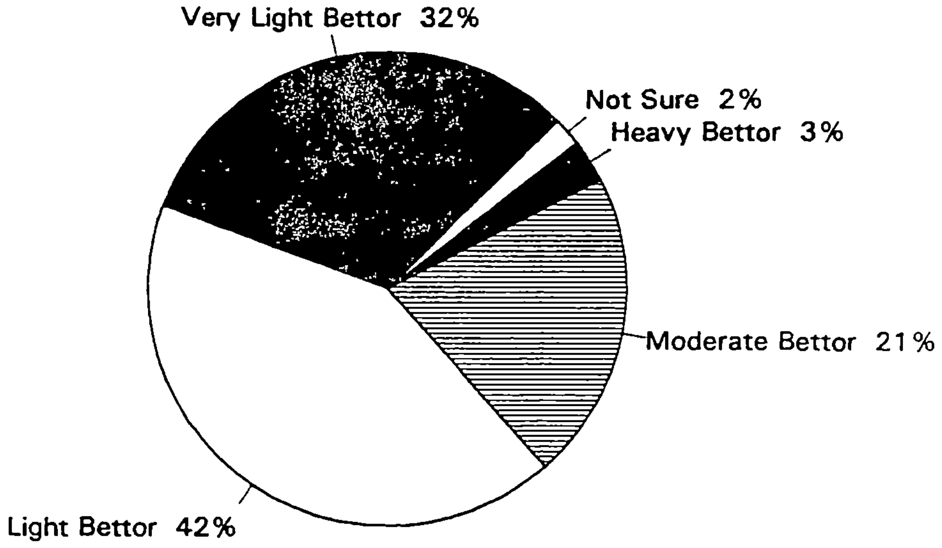
Residents who gamble in casinos were then asked how often they do so (Figure 16). One-third of these respondents (33%) said they gambled in a casino once a week or more, another 38% said once or twice a month, and three in ten respondents (29%) said four times a year or less.

The following respondent subgroups were most likely to say they gambled in a casino at least once a week:

- Those 65 years old or older and the retired,
- Respondents who live in Henderson,
- Respondents without children, and
- Those who gamble most often in Downtown Las Vegas.

If we compare Figure 6 (the frequency of gambling in any location) to Figure 16 (the frequency of gambling in a casino), we see that a much higher proportion of residents said they gamble once a week or more at all locations (50%) than said they gamble once a week or more at a casino (33%), probably reflecting the easy accessibility of slot machines and video games at a variety of locations outside casinos.

FIGURE 17
SELF-DESCRIPTION OF BETTING HABITS
(Among Those Who Gamble In Casinos)



(Base=545)

We asked residents who gamble in casinos to tell us if they considered themselves to be very light, light, moderate, somewhat heavy, or very heavy bettors (Figure 15). Most (74%) considered themselves to be either very light (32%) or light (42%) bettors. Only one-quarter (24%) of these respondents considered themselves to be moderate to heavy bettors.

Looking at subgroup differences, we see the following:

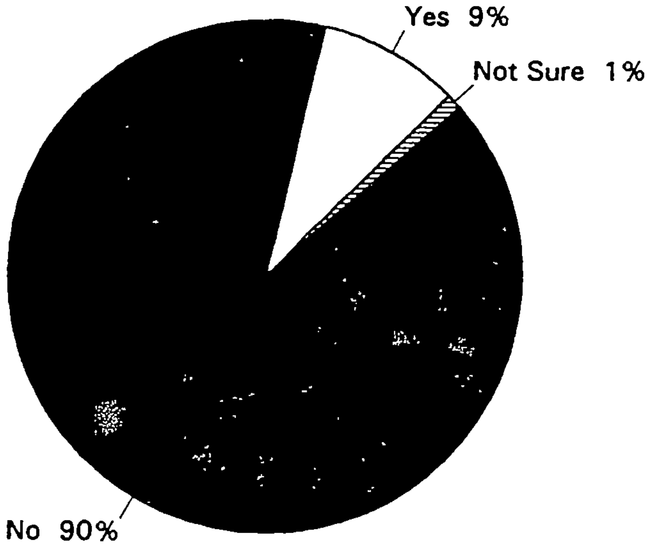
- Women are significantly more likely than men to describe themselves as "very light" bettors, and men are more likely than women to describe themselves as "moderate" bettors.

- Residents who work in casinos consider themselves to be heavier bettors than residents who do not work in casinos.

- Single respondents consider themselves to be heavier bettors than married, separated, divorced, or widowed respondents.

- Residents who gamble most often on the Strip or on Boulder Highway/Henderson are more likely than those who gamble in other locations most often to consider themselves "very light" bettors. Residents who consider themselves heavier bettors appear to go most often to off-Strip casinos or to casinos in outlying areas.

FIGURE 18
PERCENTAGE OF RESIDENTS
WHO MAINTAIN CASINO CREDIT
(Among Those Who Gamble In Casinos)



(Base=545)

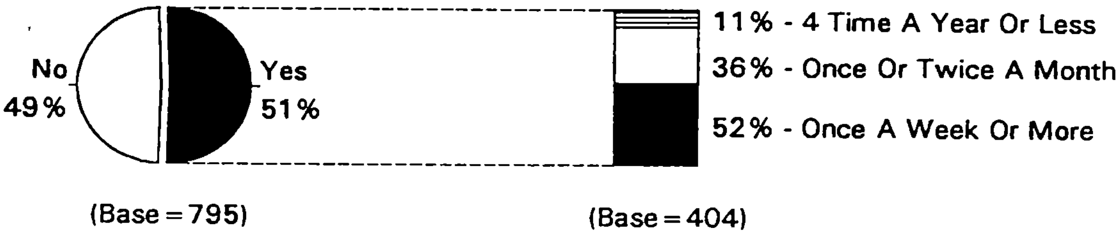
We asked residents who gamble in casinos if they maintain casino credit (Figure 16). Relatively few (9%) said they did. Women (11%) were more likely than men (7%) to say they maintained casino credit.

Gambling Outside Casinos

Convenience Store, Grocery Store, Gas Stations

We asked respondents who said they gamble at least occasionally if they ever gambled in a convenience store, grocery store, or gas station (Figure 19). About one-half of all gamblers (51%) said they gambled in these locations. Among those who gamble in these locations, 52% said they did so once a week or more, 36% said once or twice a month, and 11% said four times a year or less.

FIGURE 19
PERCENTAGE OF RESIDENTS WHO GAMBLE IN A CONVENIENCE STORE, GROCERY STORE, OR GAS STATION AND HOW OFTEN THEY DO SO

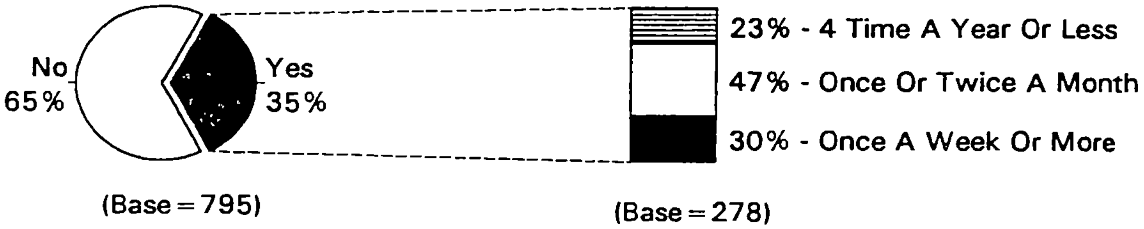


With regard to subgroup differences, we see the following:

- Retired people and those over the age of 50 are much *less* likely than others to gamble in these locations.
- Residents who live in communities outside Las Vegas and Henderson are much *less* likely than others to gamble in these locations.
- The lower the gambling budget, the more likely a respondent was to say they gambled in these locations.

Local Bar Or Restaurant

FIGURE 20
PERCENTAGE OF RESIDENTS WHO GAMBLE IN A LOCAL BAR OR RESTAURANT AND HOW OFTEN THEY DO SO

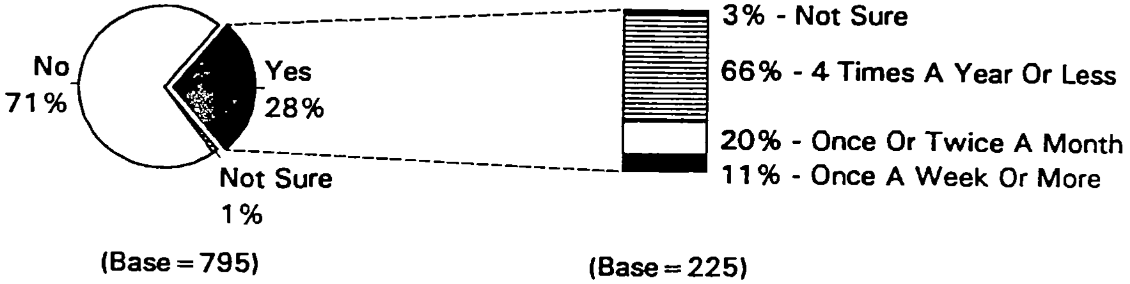


Clark County residents who gamble were asked if they ever gambled in a local bar or restaurant (Figure 20), and 35% said they did. Among those who gamble in those locations, 30% said they do so once a week or more, 47% said once or twice a month, and 23% said four times a year or less. Gambling in a bar or restaurant was more common among men, those under the age of 40, single people, and those with gambling budgets between $10 and $25.

Outside The Greater Las Vegas Area

FIGURE 21

PERCENTAGE OF RESIDENTS WHO GAMBLE OUTSIDE THE GREATER LAS VEGAS AREA AND HOW OFTEN THEY DO SO



We also asked gamblers if they ever gambled in Clark County but outside the greater Las Vegas area (Figure 21), and 28% said they did. Residents who gamble outside Las Vegas do not do so frequently: two-thirds (66%) said they gamble outside Las Vegas only about four times a year or less. The likelihood of gambling outside Las Vegas tended to increase with the income of the respondent, and retired respondents were more likely than others to say they gambled outside Las Vegas. As would be expected, residents who live outside Las Vegas or Henderson are much more likely than others to say they gamble outside Las Vegas.

Gaming Budgets

On the Clark County residents survey, we asked respondents to tell us whether they engaged in legalized gambling even occasionally, how often they gambled, and how much they budgeted on gambling. Two-thirds (66%) of these adult residents said they engaged in legalized gambling at least occasionally.

To determine legalized gambling frequency, interviewers read respondents a list of frequency categories, and respondents identified the category which best described their behavior.

The frequency categories were:

More than five times a week
About twice a week
About once a week
About twice a month
About once a month
About four times a year
About twice a year
Once a year or less.

To determine gambling budgets, respondents were asked: "On average, about how much money do you personally budget on gambling per ...(day, week, month or year)?" The choice of time period asked depended on whether the respondent described their gambling frequency in terms of times per week, month, or year respectively.

We calculated the mean budget for each of the several time period categories with the following results:

Gambling frequency period	Budget amount
Daily	$ 48.21
Weekly	53.89
Monthly	44.76
Yearly	79.56

Next we calculated the total yearly amount budgeted on legalized gambling by all respondents, multiplying the frequency period *times* the mean budget per period *times* the number of respondents in each frequency period category, as follows:

Gambling frequency period	Frequency (periods/year)	Mean budget per period	Number of respondents	Budgeted annually
Daily (5 times per week)	260	$ 48.21	53	$664,333.80
Weekly	52	53.89	343	961,182.04
Monthly	12	44.76	284	152,542.08
Yearly	1	79.56	111	8,831.16
Don't gamble/no data	0	00.00	409	0.00
			TOTAL	$1,786,889.08

The sum of these calculations is $1,786,889.08 — the total amount budgeted on legalized gambling per year among 1,200 randomly chosen Clark County residents.

Clark County has a total estimated adult population (21 years old or older) of 573,000 or 477.5 *times* 1,200 people. Since the estimated amount budgeted on legalized gambling per year per 1,200 Clark County adult residents is $1,786,889.08, then the *estimated annual amount budgeted by all* Clark County adult residents on casino gambling is 477.5 *times* $1,786,889.08, or just over $853 million ($853,239,535.70).

The accuracy of this estimate is necessarily limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

The categories used for the frequency of legalized gambling were purposely designed to be approximations ("*about* twice a week, *about* once a week" etc.) because it was felt that respondents would be unable accurately to recall the exact number of times they went to a casino to gamble over the past year. Because the frequency categories are approximate by design, the numbers we use to represent these categories in calculating the estimate are subject to error.

For example, a respondent who says he does legalized gambling "*about* once a week" may, in fact, go more or less than 52 times a year. For the sake of the estimate, we must *assume* that the mean for all respondents who said "*about* once a week" is 52, because we do not know the *actual* number of times per year that these respondents engaged in legalized gambling. The mean for these respondents might, in fact, be higher or lower than 52, but we cannot know that since we do not know the actual frequency of legalized gambling for each respondent.

With regard to the amount budgeted on legalized gambling per time period (day, week, month, year), we asked respondents to give us an exact dollar amount which represented an estimate of their *average* budget per time period. Even though respondents were asked to give an exact amount, the amount might be an over- or underestimate of the average amount actually budgeted per time period. Again, since we cannot know how accurately respondents reported the amount they budget, we *assume* for the sake of the estimate that the average amount reported is accurate.

Furthermore, the estimate represents the potential total dollar amount *budgeted* per year on legalized gambling. This figure is not meant to reflect the total amount actually *spent* on legalized gambling per year by Clark County residents, and we suspect that budgeted amounts are considerably higher than the amounts actually spent. Therefore, in determining potential total gaming *revenues*, our estimate should probably be taken as the high end of any revenue projection.

Estimated Casino Gambling Market Share

On the Clark County residents survey, we asked respondents to tell us whether they engaged in casino gambling in the greater Las Vegas area, how often they gambled at a casino, and the name of the casino where they do most of their gambling. Forty-five percent (45%) of all respondents said they gamble in casinos in the greater Las Vegas area.

To determine legalized gambling frequency, interviewers read respondents a list of frequency categories, and respondents identified the category which best described their behavior.

The frequency categories were:

More than five times a week (260 days per year)
About twice a week (104 days per year)
About once a week (52 days per year)
About twice a month (24 days per year)
About once a month (12 days per year)

About four times a year (4 days per year)
About twice a year (2 days per year)
Once a year or less. (1 day per year)

Casino gamblers were also asked to give the name of one casino where they do most of their gambling. These responses were then categorized into the following groups:

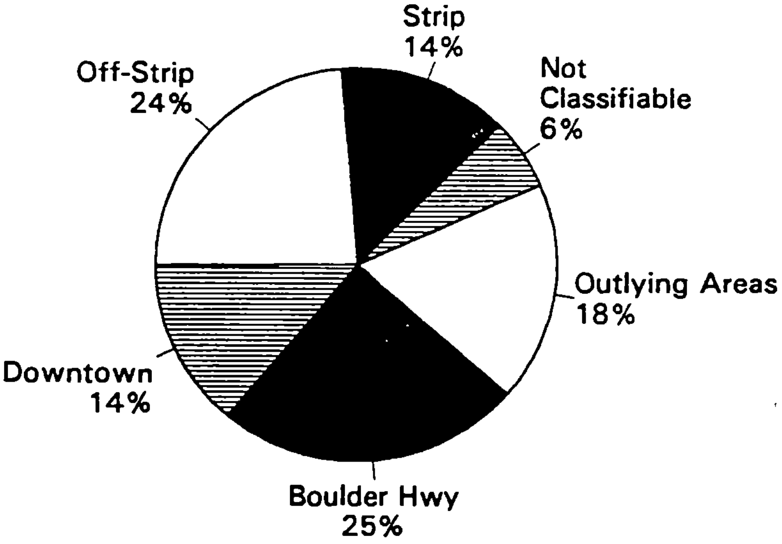
Strip
Off-Strip
Downtown
Boulder Highway/Henderson
Outlying areas
Other (not classifiable as to area)

For each respondent, we determined the approximate number of days per year spent gambling in casinos and assigned that value to the location of the casino in which the respondent said they gambled most often. (Residents who did not tell us the frequency or the location of their casino gambling were excluded from this calculation.) We then calculated the total number of days spent by all respondents in each location, with the following results:

Casino Location	Total Gambling Days
Strip	2,836
Off-Strip	4,812
Downtown	2,779
Boulder Highway/ Henderson	5,194
Outlying Areas	3,649
Other	1,222
TOTAL	20,492

Figure 22 shows the proportion of gambling days for each location — that is, estimated market share. Clark County residents who gamble in casinos appear to spend most of their time in casinos on Boulder Highway (25%) or in off-Strip casinos (24%). They spend less time in casinos in outlying areas (18%), on the Strip (14%), or Downtown (14%).

FIGURE 22
MARKET SHARE
(Computed Among Casino Gamblers Who Specified How Often They Gambled And In What Casino They Gambled Most Often)



(Base = 497)

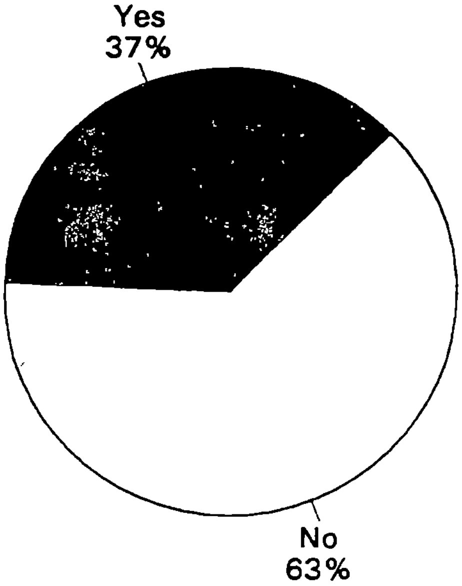
The accuracy of this estimate is also necessarily limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

The categories used for the frequency of casino gambling were purposely designed to be approximations ("*about* twice a week, *about* once a week" etc.) because it was felt that respondents would be unable accurately to recall the exact number of times they went to a casino to gamble over the past year. Because the frequency categories are approximate by design, the numbers we use to represent these categories in calculating the estimate are subject to error.

For example, a respondent who says he does casino gambling "*about* once a week" may, in fact, go more or less than 52 times a year. For the sake of the estimate, we must *assume* that the mean for all respondents who said "*about* once a week" is 52, because we do not know the *actual* number of times per year that these respondents engaged in casino gambling. The mean for these respondents might, in fact, be higher or lower than 52, but we cannot know that since we do not know the actual frequency of casino gambling for each respondent.

Further, each respondent's frequency of casino gambling was arbitrarily assigned to the casino which the respondent claimed to visit most often, as though all of the respondent's casino gambling time was spent in that casino. In fact, many respondents gamble in more than one casino, but it was deemed impractical to ask respondents to list all casinos they recalled visiting in the past year and the proportion of total casino gambling time spent in each.

FIGURE 23
PERCENTAGE OF RESIDENTS WHO HAVE BOUGHT A LOTTERY TICKET

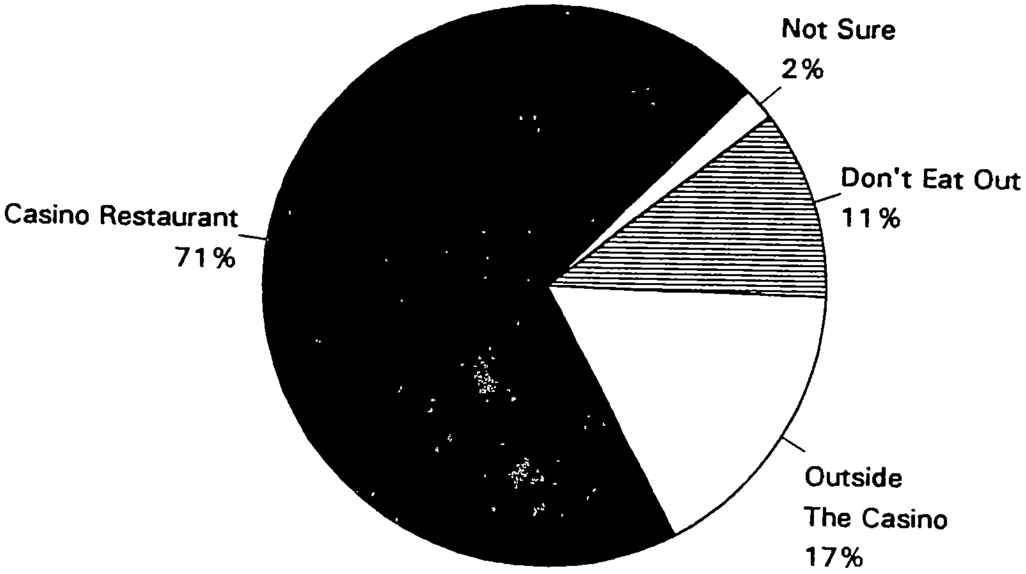


We asked all Clark County residents we interviewed if they ever buy lottery tickets from a state-run lottery — like the California or Arizona lotteries (Figure 23), and 37% said they had. The likelihood of buying a lottery ticket was highest for those with household incomes of $30,000 or more, those between 30 and 65 years old, and those with gambling budgets of $25 to $49.

Restaurants

We asked residents who go to a casino to gamble if they usually eat in a casino restaurant or in a restaurant outside the casino when they gamble (Figure 24). More than seven in ten (71%) of these respondents said they usually eat at a casino restaurant, 17% eat outside the casino, and 11% volunteered that they do not eat when they gamble at a casino.

FIGURE 24
WHERE RESIDENTS EAT WHEN GAMBLING IN A CASINO

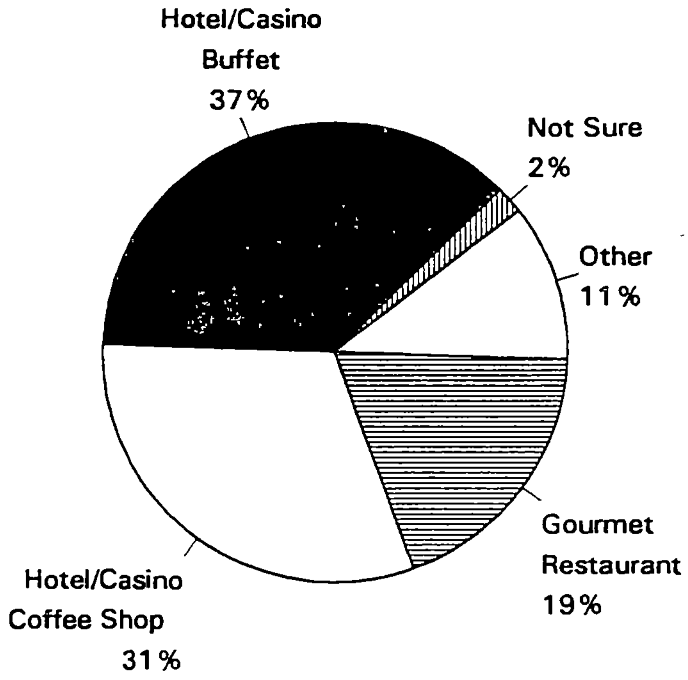


(Base = 545)

Looking at subgroup differences, we see the following:

- Women were more likely than men to say they ate in a casino restaurant.
- Respondents who are not employed for pay and the retired are more likely than employed respondents to eat in a casino restaurant.

FIGURE 25
TYPE OF RESTAURANT USUALLY PATRONIZED WHEN GAMBLING IN A CASINO



(Base = 474)

Almost four in ten residents (37%) who eat out when they go to a casino to gamble usually eat at a buffet in a hotel, motel, or casino (Figure 25). Three in ten (31%) of respondents said they usually eat at a coffee shop in a hotel, motel, or casino, and two in ten (19%) said they eat at a gourmet restaurant. Eleven percent (11%) of residents said they eat in other locations.

Income and place where residents do most of their gambling appear to affect choice of the type of restaurant.

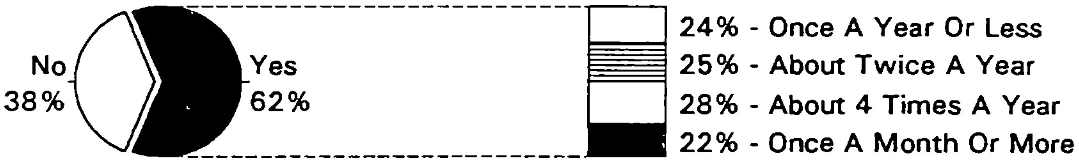
- Those with household incomes of $20,000 a year or less are most likely to say they usually eat at a buffet. Those with household incomes of $20,000 to $29,999 are far more likely than others to say they eat in a coffee shop. Those with household incomes of $40,000 or more are far more likely than those who earn less to say they usually eat in gourmet restaurants.

- Those who gamble most often on the Strip or on Boulder Highway/Henderson are much more likely than those who gamble most often elsewhere to say they eat at a buffet. Those who gamble Downtown or in outlying areas are more likely than others to say they eat in coffee shops.

Entertainment

Sixty-two percent (62%) of all residents said they had been to a casino show (Figure 26). Nearly one-quarter (22%) of those who have attended a casino show said they attend shows once a month or more, 28% said four times a year, 25% said twice a year, and 24% said once a year or less.

FIGURE 26
PERCENTAGE OF RESIDENTS WHO GO TO CASINO SHOWS AND HOW OFTEN THEY GO



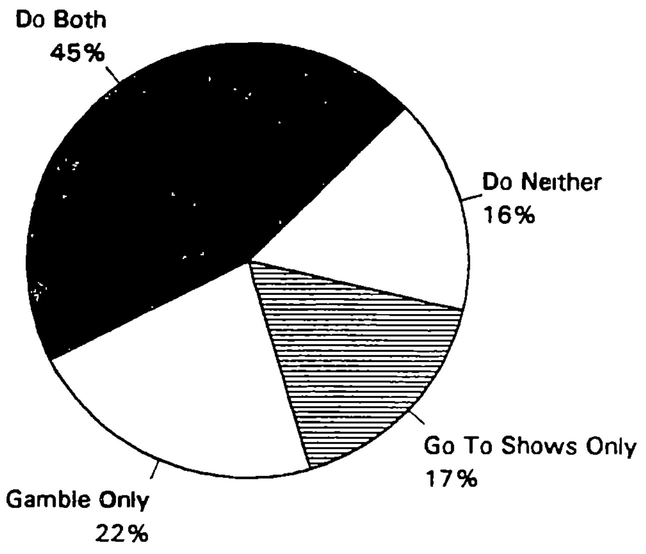
(Base=743)

Following are the most important subgroup differences with regard to casino show attendance:

- The likelihood of having ever attended a casino show increases with education and income.
- Those who live in Las Vegas or in Henderson are more likely than those who live in other parts of Clark County to say they have attended a casino show.

- Residents who gamble are significantly more likely than those who do not to say they have been to a casino show.

FIGURE 27
RELATIONSHIP BETWEEN GAMBLING AND CASINO SHOW ATTENDANCE



With regard to the relationship between gambling and casino show attendance among all residents, we see the following (Figure 27):

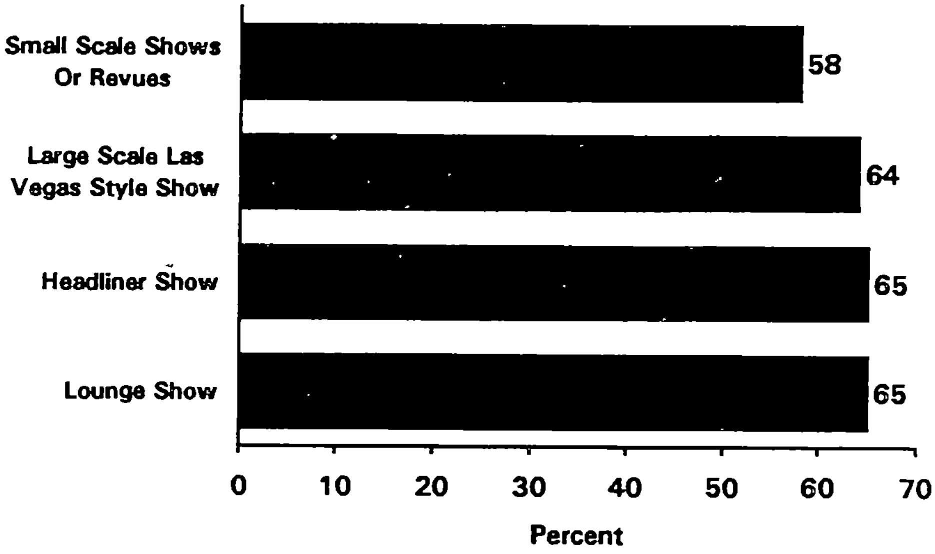
- Forty-five percent (45%) of Clark County residents both gamble and go to casino shows.

- Twenty-two percent (22%) gamble but do not go to casino shows.

- Seventeen percent (17%) go to casino shows but do not gamble.

- Sixteen percent (16%) neither gamble nor go to casino shows.

FIGURE 28
TYPE OF CASINO SHOWS ATTENDED
(Among Those Who Have Been To Casino Shows)



(Base=743)

Among those who have ever been to a casino show, 65% to a lounge show, 65% have been to a headliner show, 64% to a large-scale Las Vegas style show, and 58% to a small-scale revue (Figure 28).

Looking at important subgroup differences, we see the following:

- The likelihood of having been to a headliner show increases with household income and with age. Also, college graduates are more likely than those with less education to have been to a headliner show.

- Respondents with at least some college education were more likely than those with less education to have been to large-scale shows.

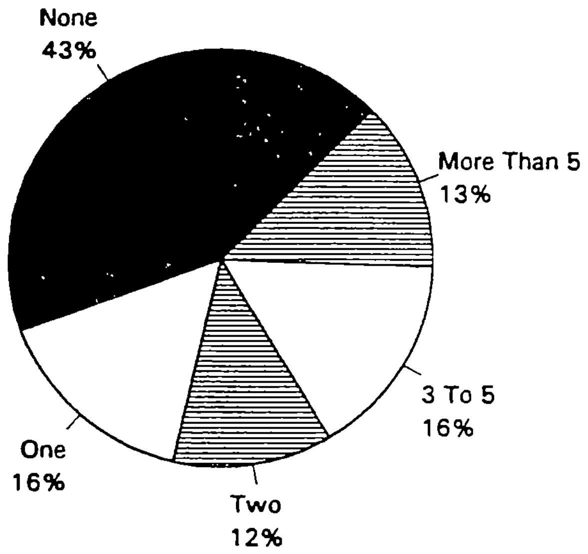
- The likelihood of having attended a small-scale show increases with household income. Those who are 40 to 49 years old were also more likely to have attended these small-scale shows.

- The likelihood of having been to a lounge show was greater for single people and respondents who work in a casino.

USE OF AIR TRANSPORTATION

We asked Clark County residents how many flights they have made out of McCarran International Airport during the past 12 months (Figure 29). Four in ten Clark County residents (43%) said they had not flown from McCarran during the previous 12 months, 16% had flown once, 12% twice, 16% three to five times, and 13% more than five times. The *average* (mean) number of flights was 3.2. The likelihood of having used McCarran frequently increased with education and household income.

FIGURE 29
NUMBER OF FLIGHTS FROM McCARRAN AIRPORT DURING PAST 12 MONTHS



APPENDIX

Questionnaire With Marginal Results

GLS RESEARCH	R&R ADVERTISING/LVCVA CLARK COUNTY RESIDENTS STUDY	PROJECT #91307
MARGINALS	(N=1200)	JULY 1992

Card #1

Respondent ID# __ __ __ __

Time Started ____________

Time Ended ____________

Interview Length 13.1 minutes (MEAN)

Interviewer ____________

Interviewer # __ __

Edited by __ __

Coded by __ __

Date ____________

Rep & page # ____________

GENDER

MALE	47%
FEMALE	53

SUPERVISOR:
MALE/FEMALE QUOTA

NO LESS THAN 47% MALE

NO MORE THAN 53% FEMALE

Hello. I'm ____________ from GLS Research, a national marketing research firm. We are conducting a survey among Las Vegas area residents and would like to ask you a few questions about travel and leisure activities. All answers are kept strictly confidential.

1. We are supposed to interview people who are 21 years old or older. Are you 21 years old or older?

YES	ASK Q2
NO NOT SURE/DK REFUSED/NA	**ASK TO SPEAK TO SOMEONE IN THE HOUSEHOLD WHO IS 21 OR OLDER**

2 Do you live year-round in Clark County, Nevada (that is, the Las Vegas area)?

YES	ASK Q3
NO NOT SURE/DK REFUSED/NA	**TERMINATE**

3. What is your ZIP code, please?

__ __ __ __ __

ALL ZIPS MUST BEGIN WITH 890- OR 891-. IF RESPONDENT GIVES A ZIP CODE THAT DOES NOT BEGIN WITH 890- OR 891-, TERMINATE. IF RESPONDENT IS NOT SURE OR REFUSES, TERMINATE.

4 In general, have things been going better or worse for you this year than last year?

BETTER	40%
WORSE	28
SAME (VOL.)	30
NOT SURE/DK	1
REFUSED/NA	1

5. What activities do you take part in during your leisure time over the course of a year? I'm interested in activities *outside your home* which you can do *in and around Las Vegas*. (DO *NOT* READ LIST ACCEPT UP TO 5 RESPONSES. PROBE) Any others?

6 Which of the activities you just mentioned do you do most often? (IF NECESSARY, READ "YES" RESPONSES BACK TO RESPONDENT TO REFRESH HIS/HER MEMORY)

7. Which of the activities you just mentioned is your favorite? (AGAIN, IF NECESSARY, READ "YES" RESPONSES BACK TO RESPONDENT TO REFRESH HIS/HER MEMORY)

	Q5	Q6 MOST OFTEN	Q7 FAVORITE
a. BINGO	2%	1%	1%
b. BOATING	10	4	3
c BOWLING	10	4	3
d. CAMPING	10	3	4
e. COMMUNITY ACTIVITIES (CHURCH, LITTLE LEAGUE, ETC.)	10	6	5
f. CYCLING	5	2	1
g. FISHING	13	4	5
h. EATING OUT	19	8	6
i GAMBLING	17	7	6
j. GOLF	11	6	5
k HIKING	11	3	4
l. HORSEBACK RIDING	2	1	1
m. HUNTING	3	1	1
n MOVIES	16	4	3
o NIGHT CLUBBING	5	1	1
p. PICNICS	8	1	2
q. SHOPPING	9	4	3
r. SHOWS	9	1	2
s SIGHT SEEING	11	4	4
t. SNOW SKIING	6	1	2
u. SPORTING EVENTS	13	5	6
v. SUNBATHING	2	0	0
w. SWIMMING	13	3	3
x. TENNIS	5	2	2
y VISITING FRIENDS OR RELATIVES	9	4	3
z. WATER SKIING	6	1	2
aa WORKING OUT	5	3	2
OTHER		11	11
NO ANSWER		8	10

I'd like to ask you a few questions about legalized gambling By *legalized gambling* I mean all games of chance, including bingo, sports book, slot machines, and video gambling games, as well as casino-type games I'm interested in all the legalized gambling you may do, whether it's at a casino or at some other public location -- for instance, a convenience store, restaurant, or gas station. (INTERVIEWER· IF RESPONDENT ASKS IF GAMBLING INCLUDES PRIVATE CARD PARTIES IN PEOPLE'S HOMES WHERE BETTING OCCURS, SAY "NO.")

8 First, do you gamble even occasionally?

YES 66%	**SKIP TO Q10**
NO . . .. 34 REFUSED/NA 0	**ASK Q9 THEN SKIP TO Q40 ON PAGE 7**

9. People have many different reasons for choosing not to gamble. What is the <u>primary</u> reason you choose not to gamble? Any other reason? (ACCEPT UP TO 2 RESPONSES.)

	1ST	2ND	
Not interested/ boring/no fun	22%	8%	
Don't like losing/ wasting money	25	9	
Can't afford it	12	3	
Religious objections	13	3	
Too risky/ odds against you...	7	3	(N=405)
Don't like gambling environment.....	2	3	
It's a bad habit.	5	2	
Not enough time.	1	1	
No second response....... ..	0	68	
Other....	1	0	
Not sure/no answer	11	0	

SKIP TO Q40 ON PAGE 7

10 Where do you do *MOST* of your gambling -- on the "Strip," in downtown Las Vegas, or elsewhere?

STRIP 22%	**SKIP TO Q12**
DOWNTOWN........ 14	**ASK Q11, THEN SKIP TO Q13**
ELSEWHERE .... 63 NOT SURE/DK ...... 1 REFUSED/NA......... 0	(N=795) **ASK Q11 & Q12**

11. Is there any particular reason why you do not go to the Strip (more often) to gamble? (ACCEPT ONE RESPONSE.)

Too crowded....	25%	
Too much traffic	13	
Out of the way	16	
Too many tourists	9	
Not that interested in gambling..	7	
No time	2	
Can't afford it	4	
Prefer another area	2	
Prefer Downtown.............	3	(N=619)
Don't like casinos/hotels	1	
Work for casino/hotel	2	
Too hard to find parking..... . ..	1	
The payoff is bad on the Strip	3	
The Strip is not safe........	1	
Other	3	
Not sure/no answer...	7	

12. Is there any particular reason why you do not go to downtown Las Vegas (more often) to gamble? (ACCEPT ONE RESPONSE.)

Too crowded	13%	
Too much traffic	7	
Out of the way	23	
Too many tourists	2	
Not that interested in gambling..	7	
No time	2	
Can't afford it.	2	
Prefer another area.	3	
Prefer Strip	5	(N=684)
Don't like Downtown dirty/uncomfortable	7	
Not a safe neighborhood	8	
Too hard to find parking..	4	
The payoff is bad Downtown	2	
Other	4	
Not sure/no answer.	13	

13 About how often do you gamble? Would you say it is . (READ LIST CIRCLE NUMBER AT FIRST "YES" RESPONSE)

More than 5 times a week....... .. 7%	**ASK Q14**
About twice a week .... 23 About once a week 20	SKIP TO Q15
About twice a month .... 23 About once a month... 13	SKIP TO Q16
About four times a year ... . 9 About twice a year.................. ... 3 Once a year or less 1	(N=795) SKIP TO Q17
NOT SURE/DK......... 0 REFUSED/NA........... 0	SKIP TO Q18

14 On average, about how much money do you personally budget on gambling per *DAY*. (N=43)

NOT SURE/DK = 99998
REFUSED/NA = 99999

$ 48 21 (MEAN)

SKIP TO Q18

15. On average, about how much money do you personally budget on gambling per *WEEK*. (N=315)

NOT SURE/DK = 99998
REFUSED/NA = 99999

$ 53 89 (MEAN)

SKIP TO Q18

16 On average, about how much money do you personally budget on gambling per *MONTH*. (N=256)

NOT SURE/DK = 99998
REFUSED/NA = 99999

$ 44.76 (MEAN)

SKIP TO Q18

17. On average, about how much money do you personally budget on gambling per *YEAR*. (N=101)

NOT SURE/DK = 99998
REFUSED/NA = 99999

$ 79 56 (MEAN)

18. Which type of gambling game do you play *MOST OFTEN*. (DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)

SLOT MACHINES....18% VIDEO POKER ....53 OTHER VIDEO MACHINES (21, KENO, ETC.) 5	ASK Q19
BACCARAT............ 1 BIG 6 0	SKIP TO Q21
BINGO.................. 3	SKIP TO Q23
BLACKJACK .... 8 CRAPS 2	SKIP TO Q21 (N=795)
KENO............... ... 2	SKIP TO Q23
POKER 3	SKIP TO Q21
RACE/ SPORTSBOOK....... 3	SKIP TO Q22
ROULETTE..... 1	SKIP TO Q21
OTHER 1	SKIP TO Q22
NOT SURE/DK........ 0 REFUSED/NA.......... 0	SKIP TO Q24

---

19. Which denomination machine do you play *MOST OFTEN*. (DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE)

NICKEL.	21%
DIME...........	0
QUARTER	74
HALF DOLLAR.	1
DOLLAR	3
FIVE DOLLARS	0 (N=602)
25 DOLLARS....	0
OTHER	0
NOT SURE/DK..	1
REFUSED/NA...	0

CONTINUE WITH Q20

20. On the average, how many coins/tokens do you usually insert before each play on a machine? (INTERVIEWER. IF RESPONDENT SAYS "MAXIMUM," ASK· "How many would that be on the average?") (WRITE NUMBER IN BLANKS BELOW) (N=602)

NOT SURE/DK =	98
REFUSED/NA =	99

3 7 (MEAN)

SKIP TO Q24

---

21 What table minimum do you play *MOST OFTEN* (DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)

LESS THAN $1.00	6%	
$1.00	14	
$2.00	28	
$3.00	6	
$5.00	34	
$10.00	4	
$25 00	3	(N=116)
$50 00	1	
OVER $50.00	0	
OTHER	2	
NOT SURE/DK	2	
REFUSED/NA	2	

CONTINUE WITH Q22

22. What is your average bet? (WRITE AMOUNT IN BLANKS BELOW.) (N=149)

NOT SURE/DK =	99998
REFUSED/NA =	99999

$ 14 50 (MEAN)

SKIP TO Q24

---

23. On the average, how much do you bet per (keno game or bingo session)? (WRITE AMOUNT IN BLANKS BELOW.) (N=41)

NOT SURE/DK =	99998
REFUSED/NA =	99999

$ 5 90 (MEAN)

CONTINUE WITH Q24

---

24 The following questions are about gambling in the greater Las Vegas area. By "greater Las Vegas area" we mean the City of Las Vegas, its immediate suburbs, North Las Vegas, Boulder Highway, and Henderson The "greater Las Vegas area" does *not* include outlying areas like Jean, Mesquite, Searchlight, or Laughlin

Do you ever go to a casino in the greater Las Vegas area to gamble?

YES	69%	ASK Q25
NO	31	(N=795)
NOT SURE/DK	0	SKIP TO Q31
REFUSED/NA	0	

25. About how often do you go to a casino in the greater Las Vegas area to gamble? Would you say it is...

More than 5 times a week	4%	
About twice a week	14	
About once a week	15	
About twice a month	19	
About once a month	19	
About four times a year	15	(N=545)
About twice a year	10	
Once a year or less	4	
NOT SURE/DK	0	
REFUSED/NA	0	

26 What is the name of the casino where do you do *MOST* of your gambling?

Strip	16%	
Off-Strip	23	
Downtown	11	
Boulder Highway	21	(N=545)
Outlying areas	14	
Other (not classifiable)	6	
Not sure/don't know	5	
Refused/no answer	3	

27 Which of the following categories best describes your betting habits in the casinos? Are you a... (READ LIST.)

Very light bettor	32%	
Light bettor	42	
Moderate bettor	21	
Somewhat heavy bettor	2	(N=545)
Heavy bettor	1	
NOT SURE/DK	2	
REFUSED/NA	1	

28 Do you maintain casino credit?

YES..	9%	
NO.	90	(N=545)
NOT SURE/DK	1	
REFUSED/NA........... .	0	

29. When you go to a casino to gamble, do you also usually eat at a casino restaurant or at a restaurant outside the casino?

CASINO RESTAURANT..........71%	
RESTAURANT OUTSIDE THE CASINO 17	ASK Q30 (N=545)
DON'T EAT OUT (VOL.) 11	
NOT SURE/DK 2	SKIP TO Q31
REFUSED/NA....... ... 0	

30 When you go to a casino to gamble, what type of restaurant do you usually eat in? Is it a. (READ LIST. IF RESPONDENT GIVES THE NAME OF A RESTAURANT, PROBE) What type of restaurant is that? (RECORD BOTH NAME AND TYPE OF RESTAURANT UNDER "OTHER")

Fast food restaurant	5%	
Buffet in a hotel, motel, or casino	37	
Coffee shop in a hotel, motel, or casino	31	
Coffee shop outside a hotel, motel, or casino.	3	(N=474)
Gourmet restaurant	19	
OTHER	3	
NOT SURE/DK	2	
REFUSED/NA........	1	

31 Do you ever gamble in a convenience store, grocery store, or gas station in the greater Las Vegas area?

YES. 51%	ASK Q32
NO............... 49	(N=795)
NOT SURE/DK 1	SKIP TO Q33
REFUSED/NA....... 0	

32 About how often do you gamble in a convenience store, grocery store, or gas station in the greater Las Vegas area? Would you say it is...

More than 5 times a week..	9%	
About twice a week	25	
About once a week	18	
About twice a month	19	
About once a month..........	17	
About four times a year	5	(N=404)
About twice a year...........	4	
Once a year or less	3	
NOT SURE/DK.................	0	
REFUSED/NA....................	0	

33. Do you ever gamble in a local bar or restaurant in the greater Las Vegas area?

YES 35%	ASK Q34
NO.. 65	(N=795)
NOT SURE/DK...... 0	SKIP TO Q35
REFUSED/NA........ 0	

34 About how often do you gamble in a local bar or restaurant in the greater Las Vegas area? Would you say it is...

More than 5 times a week	4%	
About twice a week	12	
About once a week	14	
About twice a month....	19	
About once a month..........	27	
About four times a year	12	(N=278)
About twice a year............	6	
Once a year or less	5	
NOT SURE/DK.................	1	
REFUSED/NA............... ..	0	

35. Do you ever gamble in Clark County *outside* the greater Las Vegas area?

YES 28%	ASK Q36
NO......................71	(N=795)
NOT SURE/DK...... 1	SKIP TO Q37
REFUSED/NA... 0	

36 About how often do you gamble outside the greater Las Vegas area? Would you say it is. .

More than 5 times a week	1%	
About twice a week	4	
About once a week	6	
About twice a month	8	
About once a month	12	
About four times a year	26	(N=225)
About twice a year	20	
Once a year or less	20	
NOT SURE/DK	3	
REFUSED/NA	0	

37. Would you like to gamble more often than you do now?

YES	23%	ASK Q38
NO	77	(N=795)
REFUSED/NA	0	SKIP TO Q39

38. What is the <u>primary</u> reason you don't gamble more often than you do now? Any other reason? (ACCEPT UP TO 2 RESPONSES.)

	1ST	2ND	
Can't afford it	85%	3%	
No interest	1	2	
No time	3	3	
Don't like gambling that much	1	1	(N=182)
The crowds	0	1	
I'm not lucky/ I always lose/the odds are against me	7	3	
No second reason		87	
Other	2	2	
Not sure/no answer	1	0	

39 Do you gamble only when you have out-of-town visitors or do you gamble at other times as well?

ONLY WHEN HAVE OUT-OF-TOWN VISITORS	15%	
OTHER TIMES	79	
BOTH (VOL.)	6	(N=795)
NOT SURE/DK	0	
REFUSED/NA	0	

40. **(ASK OF ALL RESPONDENTS.)** Do you ever buy lottery tickets for a state-run lottery like the California or the Arizona lotteries?

YES	37%
NO	63
NOT SURE/DK	0
REFUSED/NA	0

41. Do you ever go to any of the shows which the casinos offer? This would include lounge acts as well as showrooms.

YES	62%	ASK Q42
NO	38	
NOT SURE/DK	0	SKIP TO Q44
REFUSED/NA	0	ON PAGE 8

42 About how often do you go to a casino show? Would you say it is.. (READ LIST. CIRCLE NUMBER AT FIRST "YES" RESPONSE.)

Twice a week or more	1%	
About once a week	2	
About twice a month	6	
About once a month	14	
About four times a year	28	(N=743)
About twice a year	25	
Once a year or less	24	
NOT SURE/DK	1	
REFUSED/NA	0	

* * * * * * * * * * * * * *

43 Which of the following kinds of shows have you been to? (READ FIRST 4 RESPONSES IN LIST ACCEPT MULTIPLE RESPONSES.)

a. Headliner shows (big-name stars)	65%
b Large-scale Las Vegas style shows	64
c. Small-scale shows or reviews	58
d. Lounge shows (local bands)	65 (N=743)

NONE OF THE ABOVE	0	DO NOT READ
NOT SURE/DK	0	
REFUSED/NA	0	

* * * * * * * * * * * * * *

44 Do you ever visit the Lake Mead recreational area?

YES	71%	ASK Q45
NO	29	SKIP TO Q49 ON PAGE 9
NOT SURE/DK	0	
REFUSED/NA	0	

45. How many times did you go to Lake Mead during the past year? (FILL IN EXACT AMOUNT *AND CIRCLE APPROPRIATE CATEGORY BELOW*)

NOTE. 998 = NOT SURE/DK
999 = REFUSED/NA

12 2 TIMES (MEAN)

NONE	10%	SKIP TO Q48 ON PAGE 9
ONE	12	ASK Q46 (N=856)
TWO	16	
THREE	10	
FOUR	8	
FIVE	5	
MORE THAN FIVE	38	
NOT SURE/DK	1	SKIP TO Q48 ON PAGE 9
REFUSED/NA	0	

46. Thinking now only about your *last* trip to Lake Mead, how many days did you spend there? (FILL IN EXACT AMOUNT *AND CIRCLE APPROPRIATE CATEGORY BELOW*)

97 DAYS OR MORE = 97
NOT SURE/DK = 98
REFUSED/NA = 99

1.5 DAYS (MEAN)

1 DAY	81%
2 TO 3 DAYS	15
4 TO 7 DAYS	1
8 TO 14 DAYS	1 (N=766)
15 DAYS OR MORE	1
NOT SURE/DK	0
REFUSED/NA	0

47. On your last trip to Lake Mead, what was the approximate *TOTAL* amount you spent on . (N=766)

a. Food and beverages?

$ 27 72 (MEAN)

b. Gasoline?
(Include car *and* boat if you have one)

$ 19 40 (MEAN)

c. All other expenses?

$ 16 35 (MEAN)

48. When you go to Lake Mead, which of the following leisure activities do you participate in? (START WITH ITEM CHECKED AND CONTINUE UNTIL ALL ITEMS ARE ASKED)

START

☐ a. Swimming.......... 61%
☐ b. Hiking.......... 32
☐ c. Camping.......... 32
☐ d. Boating.......... 55
☐ e. Water skiing.......... 28
☐ f. Jet skiing.......... 13 (N=856)
☐ g. Sailboarding.......... 4
☐ h. Horseback riding.......... 4
☐ i. Sunbathing.......... 55
☐ j. Fishing.......... 49
k. Other (READ LAST)... 12

49. How many flights have you made out of McCarran International Airport (the Las Vegas airport) during the past 12 months?

3.2 (MEAN)

50. Over the past year, have you used a taxi to travel in the Las Vegas area?

YES.......... 18%	ASK Q51
NO.......... 82	SKIP TO Q52
NOT SURE/DK.......... 0	
REFUSED/NA.......... 0	

51. Generally, were you satisfied with the taxi service provided?

YES.......... 80%
NO.......... 20 (N=216)
NOT SURE/DK.......... 0
REFUSED/NA.......... 0

52. Over the past year, have you used the public bus system to travel in the Las Vegas area?

YES.......... 9%	ASK Q53
NO.......... 91	SKIP TO Q54
NOT SURE/DK.......... 0	
REFUSED/NA.......... 0	

53 Generally, were you satisfied with the public bus service provided?

YES.......... 49%
NO.......... 51 (N=103)
NOT SURE/DK.......... 0
REFUSED/NA.......... 0

54. Have you heard or read anything about the Las Vegas Convention and Visitors Authority (also known as the LVCVA)?

YES.......... 61%	ASK Q55
NO.......... 37	SKIP TO Q56
NOT SURE/DK.......... 1	
REFUSED/NA.......... 0	

55. Would you say that you have a favorable or unfavorable opinion of the Las Vegas Convention and Visitors Authority?

FAVORABLE.......... 74%
UNFAVORABLE.......... 5 (N=733)
NOT SURE/DK.......... 20
REFUSED/NA.......... 1

56. As you may or may not know, the Las Vegas Convention and Visitors Authority is an organization responsible for bringing conventions and tourists to Las Vegas.

How good a job do you think the Las Vegas Convention and Visitors Authority is doing in bringing conventions and tourists to Las Vegas? Would you say they're doing an excellent job, a good job, a fair job, or a poor job?

EXCELLENT.......... 29%
GOOD.......... 48
FAIR.......... 11
POOR.......... 2
NOT SURE/DK.......... 9
REFUSED/NA.......... 0

57. How do you think the Las Vegas Convention and Visitors Authority is funded? Is it funded through local tax dollars which Las Vegas residents pay or is it funded through hotel tax dollars which visitors to Las Vegas pay when they stay at Las Vegas hotels?

LOCAL TAX.......... 12%
HOTEL TAX.......... 47
BOTH (VOL.).......... 9
NOT SURE/DK.......... 31
REFUSED/NA.......... 0

* * * * * * * * * * * * * *

Now I'd like to ask you some questions just for classification purposes. As I mentioned before, all your answers will be kept strictly confidential

58 What is your employment situation? Are you. (READ LIST.)

Employed full time	51%	ASK Q59 & Q60
Employed part time	6	
Self-employed	8	
Not employed for pay	15	SKIP TO Q62 ON PAGE 11
Retired	18	
Student	2	
REFUSED/NA	1	

59. What kind of work do you do?

60. What industry is that in?

(PROBE FOR JOB TITLE AND/OR LISTEN CAREFULLY TO JOB DESCRIPTION AND THE KIND OF COMPANY WORKED FOR FILL IN THE BLANKS BELOW)

____________________ ____________________

Job description/title Industry

JOB CATEGORIES (FOR CODERS' USE ONLY)	
PROFESSIONAL/ TECHNICAL	18%
MANAGERS/OFFICIALS/ PROPRIETORS	14
SALES/CLERICAL WORKERS	19
CRAFT WORKERS/FOREMEN	8
SERVICE WORKERS/ OPERATORS	34
LABORERS/AGRICULTURAL WORKERS	6
OTHER	1
NOT SURE/DK	0
REFUSED/NA	1

(N=781)

INDUSTRY CATEGORIES (FOR CODER'S USE ONLY)	
MINING	1%
CONSTRUCTION	10
MANUFACTURING	3
TRANSPORTATION, COMMUNICATIONS, ELECTRIC, GAS, & SANITARY	5
WHOLESALE TRADE	1
RETAIL TRADE	7
FINANCE, INSURANCE, & REAL ESTATE	6
SERVICES	52
AGRICULTURE/FORESTRY	1
PUBLIC ADMINISTRATION	12
OTHER	0
NOT SURE/DK	1
REFUSED/NA	1

(N=781)

* * * * * * * * * * * * * * *

INTERVIEWER: IF IT IS <u>COMPLETELY CLEAR</u> FROM THE PREVIOUS QUESTION THAT THE RESPONDENT WORKS FOR A CASINO OR CASINO/HOTEL, CIRCLE "1" ("YES") IN THE NEXT QUESTION AND CONTINUE. OTHERWISE, ASK THE NEXT QUESTION

61. Do you work for any of the casinos or casino/hotels in Las Vegas?

YES	21%
NO	77 (N=781)
NOT SURE/DK	0
REFUSED/NA	2

62. What year did you move to Clark County, or where you born here? (RECORD LAST TWO DIGITS OF YEAR <u>AND CIRCLE APPROPRIATE CATEGORY BELOW</u>.)

YEAR: <u>1977</u> (MEAN, EXCLUDING "BORN HERE")

NOTE. 96 = BORN HERE
98 = NOT SURE/DK
99 = REFUSED/NA

BORN HERE....	9%
1960 OR BEFORE.......	11
1961 TO 1965.	8
1966 TO 1970....	6
1971 TO 1975.	8
1976 TO 1980.	13
1981 TO 1985...	12
1986 TO PRESENT	33
REFUSED/NA . . .	1

63. Do you own your home or do you rent?

OWN (OR BUYING).	59%
RENT (OR BOARDING). .	39
NOT SURE/DK	1
REFUSED/NA	1

64. What was the last grade or year of school that you completed? (DO NOT READ LIST.)

GRADE SCHOOL OR SOME HIGH SCHOOL . . .	12%
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12)	39
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE -- NO BACHELOR'S DEGREE)	29
GRADUATED COLLEGE ..	13
GRADUATE SCHOOL (MASTER'S OR PH D.)	6
TECHNICAL, VOCATIONAL OR TRADE SCHOOL.....	2
REFUSED/NA.......	0

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

Single...	23%
Married.......	56
Separated/divorced	12
Widowed	7
REFUSED/NA..	1

66. Do you have any children of your own living at home with you who are.. (READ LIST.)

a. Less than 13 years old	30%
b. 13-18 years old	10
c. More than 18 years old ...	11

67. About how many dinners do you eat out every month? (FILL IN BLANKS.)

NOTE 00 = NONE
98 = NOT SURE/DK
99 = REFUSED/NA

<u>7.3</u> (MEAN)

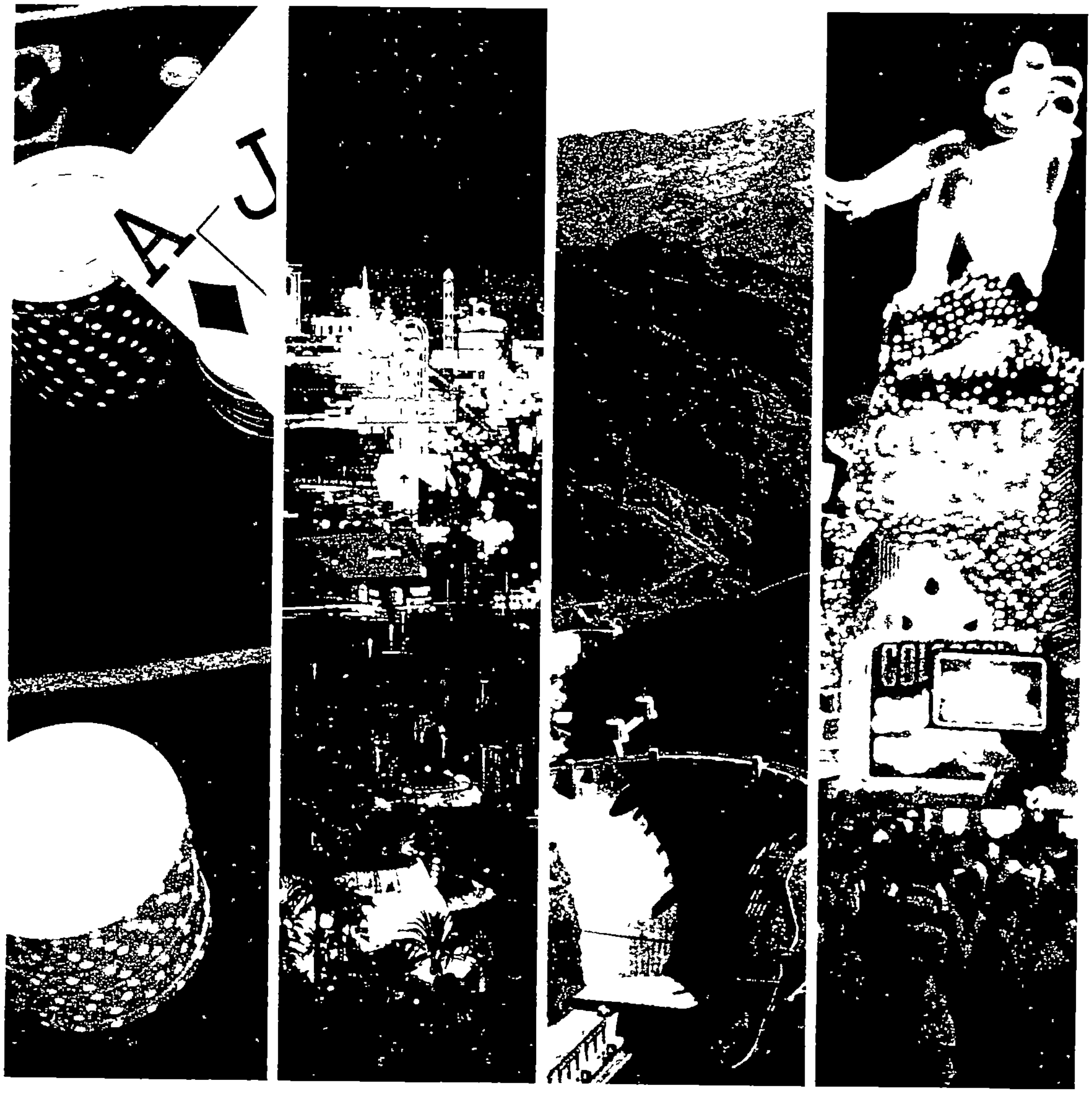
IF "NONE" ("00"), SKIP TO Q69

68. Of the dinners you eat out, about what percentage would you say you eat in hotel or motel restaurants? (FILL IN BLANK. NUMBER CANNOT EXCEED 100.) (N=1127)

NOTE: 998 = NOT SURE/DK
999 = REFUSED/NA

<u>30.0%</u> (MEAN)

CLARK COUNTY RESIDENTS STUDY 1990



LAS VEGAS CONVENTION AND VISITORS AUTHORITY

CONDUCTED BY GLS RESEARCH, 1990

R&R ADVERTISING/
LAS VEGAS CONVENTION & VISITORS AUTHORITY

1990 CLARK COUNTY RESIDENTS STUDY

ACKNOWLEDGEMENT

The Las Vegas Convention and Visitors Authority and GLS Research wish to thank the residents of Clark County for their cooperation on this research project.

CLARK COUNTY RESIDENTS STUDY SPONSORING AUTHORITY

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CHAPTER 1

RESEARCH OVERVIEW

CHAPTER 1
RESEARCH OVERVIEW

INTRODUCTION

For several years, R&R Advertising and the Las Vegas Convention and Visitors Authority (LVCVA) have been conducting ongoing surveys to determine the opinions, attitudes, and behavior of all Americans -- visitors and non-visitors alike -- toward Las Vegas. While the data from those studies has yielded valuable national and regional information, they have produced almost no information concerning attitudes and behavior of local (Clark County) residents.

Consequently, R&R Advertising and LVCVA asked GLS Research to conduct a survey of Clark County residents to investigate the following areas:

- What Clark County residents do with their leisure time and the importance of gambling in relation to other leisure activities.
- The opinions and behavior of Clark County residents in relation to gambling, casino entertainment, and local restaurants.
- Activities of Clark County residents outside of casinos.

A detailed analysis of the findings of the 1990 study of Clark County residents is presented after a brief discussion of the study methodology.

METHODOLOGY

GLS Research conducted telephone interviews with 1,000 respondents selected from a random-digit-dial sample of residents of Clark County, Nevada. Full-scale interviewing was begun on October 2, 1990, and completed on October 9, 1990.

The margin of error for the 1,000 respondent sample is ± 3.2% at the 95% level of confidence. That is, if this survey were to be repeated exactly as it was originally conducted, then 95 times out of 100 the responses from the sample (expressed as proportions) would be within 3.2% of the actual population proportions.

The data analysis consisted of developing statistical profiles of the attitudes, opinions, and perceptions of respondents and identifying statistically significant subgroup differences in response patterns among respondents.

Details on the findings and conclusions of the survey are presented in the following sections of this report.

CHAPTER 2

RESEARCH HIGHLIGHTS

CHAPTER 2
RESEARCH HIGHLIGHTS

R&R Advertising and the Las Vegas Convention and Visitors Authority (LVCVA) asked GLS Research to design a quantitative study for the purpose of investigating the leisure time activities of Clark County residents and their attitudes, opinions, and behavior with regard to gambling and other casino-related activities.

The study consisted of 1,000 interviews with Clark County residents who were randomly selected from a random-digit-dial sample of all Clark County residents. The margin of error for the 1,000 respondents is ± 3.2% at the 95% level of confidence. Statistical analyses of the data were performed, and statistically significant subgroup differences in response patterns among respondents were identified.

Following are highlights of the findings of this study of Clark County residents:

Gambling

- *Gambling ranked high among activities in which Clark County residents participate.* It ranked fourth among activities in which residents said they participated. Only eating out, movies, and shopping were mentioned by larger proportions of residents. Among activities done "most often" and among "favorite" activities, gambling also ranked fourth.
- About two-thirds of Clark County residents (65%) said they gamble at least occasionally.
- Almost half of those who gamble (48%) do so at least once a week. These frequent gamblers tended to be men, respondents 50 years old or older, the retired, casino workers, and those who gamble *outside* the Strip.
- Two-thirds of gamblers (66%) budget less than $25.00 per visit for gambling, but 34% budget $25.00 or more per visit -- with 17% budgeting $25.00 to $49.00 and 17% budgeting $50.00 or more.
- Video games (played most often by 45% of residents who gamble) and slot machines (played most often by 26% of residents who gamble) proved to be the most popular games.

Women were much more likely than men to say they played slot machines most often. Men were far more likely than women to say they played poker and racebook/sportsbook most often.

As one would expect, respondents with lower gambling budgets play video games and slot machines most often. Those with gambling budgets of $50.00 or more per visit are more likely than those with lower budgets to play blackjack, poker, racebook/sportsbook, and "other" games most often.

- Three-quarters of those who play video games or slot machines play the quarter machines most often, and almost four in ten video/slot machine players insert five coins per play.

- Among table game players (most frequently blackjack, poker, Big 6, or craps), 29% play a table minimum of $5.00 most often, and an equal proportion (28%) play a minimum of $2.00 to $3.00.

- Among those who play table games, racebook/sportsbook, or "other" games most often, over half (54%) said their average bet was $5.00 or less.

- Among residents who gamble, one-third gamble most often on the Strip, while two in ten gamble most often in Henderson or Downtown. Interestingly, 10% of residents who gamble do so most frequently in a convenience store, grocery store, gas station, or local bar.

- Almost one-half of respondents who do not gamble on the Strip said it was the crowds, traffic, and tourists that keep them away. Another 13% said the Strip was inconvenient (that is, out of the way and hard to get to).

- Those who do not gamble Downtown also cited crowds and inconvenience as reasons for not gambling there, but they also said they felt Downtown was dirty, uncomfortable, and unsafe -- negative comments that were not made about the Strip.

- Among those who gamble, 27% said they would like to gamble more often. The vast majority of these respondents (90%) said they did not gamble more often because they "can't afford it."

- Only one-quarter of residents who gamble said they do so *only* when they have out-of-town visitors, but three-quarters gamble at other times.

- Seventy-seven percent (77%) of *respondents who gamble* (or 50% of *all* respondents) do so at least occasionally in a casino.

- Nearly eight in ten respondents who gamble in a casino said they do so at least once a month, with 40% saying once a week or more and 38% saying once or twice a month.

  Those most likely to gamble most frequently in a casino (once a week or more often) are men, those 50 years old or older, the retired, respondents without children, those who gamble most often in Downtown Las Vegas, and those with gambling budgets of $50.00 or more.

- Of those who gamble in casinos, three-quarters considered themselves to be either very light or light bettors. Only one-quarter considered themselves to be moderate to heavy bettors.

- Twelve percent (12%) of residents who gamble in casinos maintain casino credit.

Restaurants

- Almost three-quarters of residents who gamble in casinos said they usually eat in a casino restaurant when they gamble.

- When gambling in a casino, residents are most likely to eat at a buffet (37%) or coffee shop (28%). Two in ten also said they most often ate in a gourmet restaurant.

Entertainment

- More than half (54%) of residents say they have been to a casino show.

  About one-quarter of residents who attend casino shows do so once a month or more. One-quarter attend four times a year, one-quarter go twice a year, and the remainder go once a year or less.

- Two-thirds of all residents who have been to casino shows have attended headliner shows. Approximately one-half have also attended large-scale Las Vegas style shows, lounge shows, and small-scale revues.

Lake Mead

- Seven in ten respondents said they had ever been to Lake Mead, and all but 8% of them visited Lake Mead during the past year. Moreover, 36% of those who have visited Lake Mead went there five or more times during the past year.

  Most residents (80%) who visited Lake Mead last year spent only one day there on their last trip to the lake.

- Residents were asked how much they spent on average during their last trip to the Lake. On average they spent of $23.74 on food and drink, $18.57 on gasoline, and $6.26 on "other" expenses.

- Not surprisingly, the Lake Mead activities residents most often engaged in were swimming, boating, sunbathing, and fishing. Water skiing, camping, and hiking were also popular.

CHAPTER 3

RESEARCH FINDINGS

CHAPTER 3
RESEARCH FINDINGS

LEISURE ACTIVITIES

Overview

We asked all residents to tell us in their own words what activities they took part in during their leisure time over the course of a year. (Residents were instructed to volunteer only activities outside the home which could be done in or around Las Vegas.) Residents were then asked which of the activities they mentioned was the one they did most often and which was their favorite (Table 1).

Gambling ranked high on all measures -- fourth among all activities mentioned (27%), fourth among activities done most often (5%), and fourth among favorite activities (5%).

Significantly higher proportions of residents in the following subgroups volunteered gambling as an activity in which they participated. Members of the same subgroups were also much more likely than others to say gambling was their favorite activity:

- Those 50 years old or older and the retired.
- Those who have moved to Las Vegas since 1981.
- Those who gamble *outside* the Strip.
- Those with gambling budgets of $15.00 or more per casino visit.
- Those who are renters rather than home owners.

TABLE 1

LEISURE ACTIVITIES OF CLARK COUNTY RESIDENTS

Q4. What activities do you take part in during your leisure time?	Activities (volunteered responses)*	Activity done most often**	Favorite activity**
Eating out	56%	17%	12%
Movies	35	7	7
Shopping	30	8	7
Gambling	27	5	5
Visiting friends	23	7	6
Camping	23	5	7
Community activities	22	8	6
Fishing	20	4	4
Boating	17	3	4
Picnics	16	2	2
Swimming	15	3	3
Bowling	15	2	3
Hiking	14	3	4
Sightseeing	13	2	2
Sporting events	13	3	4
Golf	12	5	7
Working out	11	5	3
Night clubbing	10	3	2
Cycling	10	1	1
Snow skiing	6	1	2
Hunting/shooting	6	1	2
Bingo	6	1	2
Water skiing	5	1	2
Horseback riding	5	2	3
Sunbathing	4	1	1
Tennis	3	1	1
Other	NA	4	4
No answer	NA	7	7

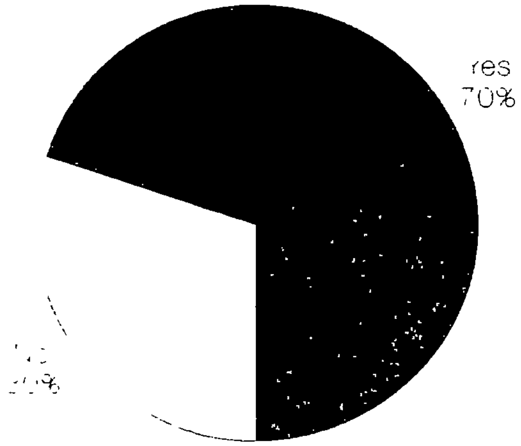
* Residents volunteered up to five activities.

** Only one response was allowed; percentages do not add to 100 because of rounding.

Lake Mead

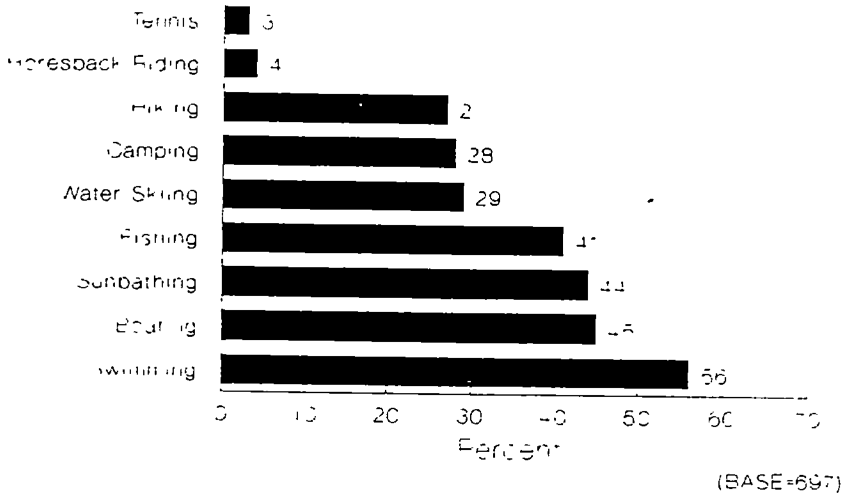
We also asked residents if they had ever visited the Lake Mead Recreational Area. Seven in ten residents (70%) said they had (Figure 1).

FIGURE 1
PERCENTAGE OF RESIDENTS
WHO HAVE BEEN TO LAKE MEAD



Residents who have ever been to Lake Mead were read a list of activities and asked which ones they participated in while at Lake Mead (Figure 2). More than one-half (56%) of the respondents said they went swimming, while more than four in ten mentioned boating (45%), sunbathing (44%), and fishing (41%). About three in ten respondents also mentioned water skiing (29%), camping (28%), and hiking (27%). Relatively few respondents said they went horseback riding (4%), or played tennis (3%).

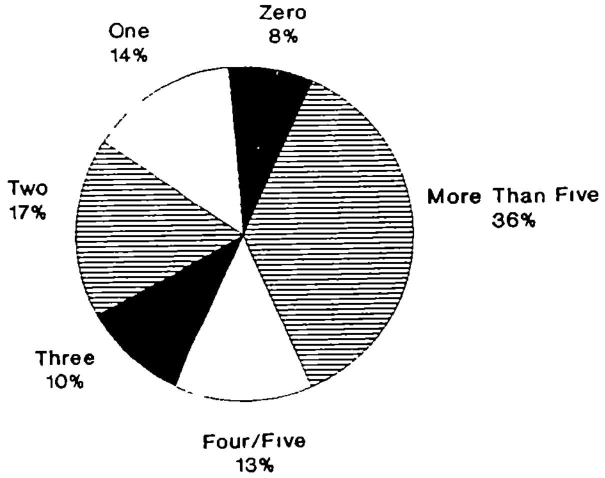
FIGURE 2
LAKE MEAD ACTIVITIES
(Among Those Who Visit Lake Mead)



In general, involvement in all the activities listed declined with age, particularly over the age of 65. Other subgroup differences included the following:

- Swimming was mentioned by a higher proportion of those with children under the age of 13.
- Boating, which requires a fairly sizeable initial investment of money, was mentioned by a higher proportion of respondents with larger household incomes ($40,000 or more).
- Water skiing was much more likely to be cited by those in higher household income brackets; those with incomes of $40,000 or more are twice as likely as those with incomes of less than $20,000 to engage in water skiing.
- Fishing was mentioned by a higher proportion of men than women. Also, the longer since a person moved to Las Vegas, the more likely they are to mention fishing as a Lake Mead activity.

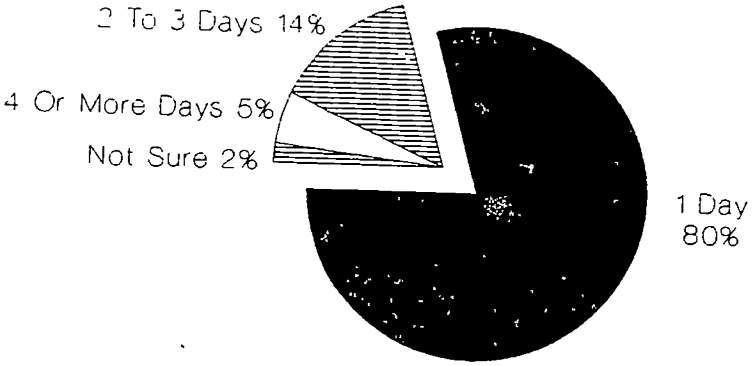
FIGURE 3
HOW MANY TIMES VISITED LAKE MEAD DURING PAST YEAR



(Base=697)

In the 1990 Residents Study, we asked residents who had ever been to Lake Mead how many times they visited the lake during the past year (Figure 3). Eight percent (8%) of these respondents said they did not go to Lake Mead at all last year, but 14% had been once, 17% twice, 10% three times, 13% four or five times, and 36% had been more than five times.

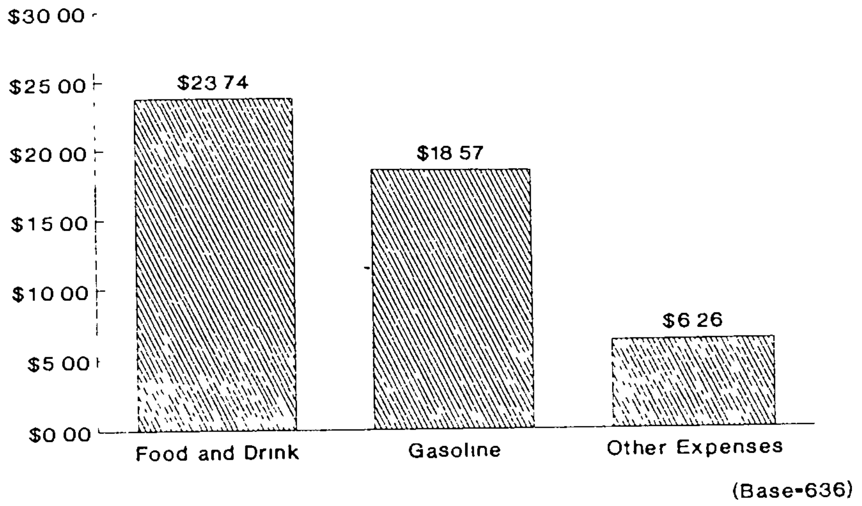
FIGURE 4
DAYS SPENT AT LAKE MEAD DURING LAST TRIP
(Among Those Who Visited Lake Mead Last Year)



(BASE=636)

Residents who actually visited Lake Mead during the past year were asked how many days they spent there on their last trip. Eight in ten respondents (80%) said they spent only one day there, while 14% said they spent two to three days, and only 5% said they spent more than three days (Figure 4).

FIGURE 5
AVERAGE AMOUNT SPENT AT LAKE MEAD ON LAST TRIP



In the 1990 Study we also asked those Clark County residents who had visited Lake Mead to tell us the approximate total amount they spent on their last trip to the lake. The average (mean) dollar amount spent on food and beverages was $23.74; the average amount spent on gasoline was $18.57; and the average spent on "all other expenses" was $6.26 (Figure 5).

Lake Mead Revenues

LVCVA asked GLS Research to estimate annual Lake Mead expenditures attributable to Clark County residents who visit the Lake. Using data about the frequency of visits during the past year and the amount spent on food and beverages, gasoline, and all other expenses on their last visit to the lake, it is possible to estimate the annual expenditures as follows:

- Nearly two-thirds (63.5%) of these adult residents said they had visited Lake Mead at least once during the past year. The average number of visits to Lake Mead by these respondents during the past year was 11.1.

- The average amount spent by these respondents during their last visit to Lake Mead on each of three expenditure categories is given below:

Food and Beverages	$ 23.74
Gasoline (Car and Boat)	18.57
All Other Expenses	6.26

- Annual expenditures on these categories can be estimated by multiplying the amount spent on the last trip *times* the number of trips taken during the past year by that respondent. Summing these calculations over all respondents who took at least one trip to Lake Mead over the past year results in the following annual expenditure estimates for this random sample population of 1,000 Clark County adult residents.

ESTIMATED ANNUAL EXPENDITURES -- SAMPLE POPULATION

Food and Beverages	$ 228,967
Gasoline (Car and Boat)	158,644
All Other Expenses	62,744
TOTAL ALL CATEGORIES	$ 450,355

- Clark County has a total estimated adult population of 520,000 or 520 *times* 1000 people. The estimated annual amount spent on each of these expenditure categories which is attributable to Clark County residents who visited Lake Mead is simply 520 *times* each category. These calculations are presented below.

ESTIMATED ANNUAL EXPENDITURES -- TOTAL POPULATION

Food and Beverages	$119,062,840
Gasoline (Car and Boat)	82,494,880
All Other Expenses	32,626,880
TOTAL ALL CATEGORIES	$234,184,600

The accuracy of these estimates are necessarily limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

In the survey respondents were asked to give expenditure data only for their last trip to Lake Mead. The last trip data was preferred over estimates for the entire past year because it is was deemed likely that the respondent's would be able to give much more accurate last trip expenditure data than they would in trying to sum expenditures over several trips throughout the past year. We then used this data as representative of an *average* trip to Lake Mead in calculating past year expenditures for that respondent.

For some respondents, their last trip to Lake Mead may not be representative of their expenditure behavior and we will derive either an over or under estimate of their actual past year expenditures. However, over a relatively large sample of 1,000 respondents we expect that possible over and under estimates will cancel each other out so that the sum of the individual annual expenditure estimates will approach actual annual expenditures for these respondents with some degree of accuracy. While we believe the calculations to be reasonable estimates of past year expenditures, it is possible that our sample population could contain at least some upward or downward bias on actual past year expenditures.

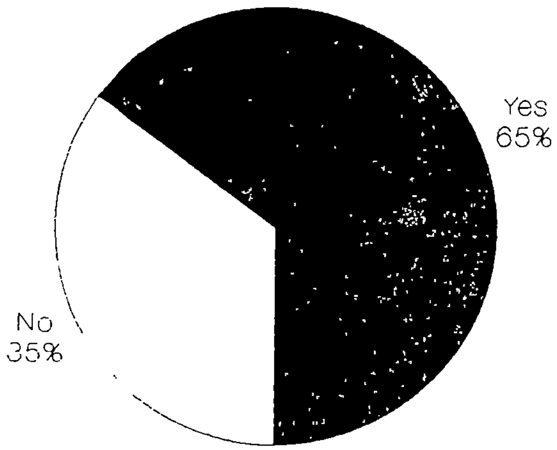
We urge the LVCVA to view these expenditure estimates as indicative of the level of expenditures attributable to Clark County residents who visit the Lake rather than definitive of the actual amounts spent.

GAMBLING

Gambling in General

About two-thirds (65%) of all residents said they gambled at least occasionally, though 35% said they did not (Figure 6).

FIGURE 6
PERCENTAGE OF RESIDENTS
WHO GAMBLE AT LEAST OCCASIONALLY



We asked residents who do not gamble why they don't (Table 2). Over four in ten (43%) residents cited financial reasons, two in ten (20%) said gambling was not interesting to them, and 25% mentioned moral or ethical reasons.

TABLE 2

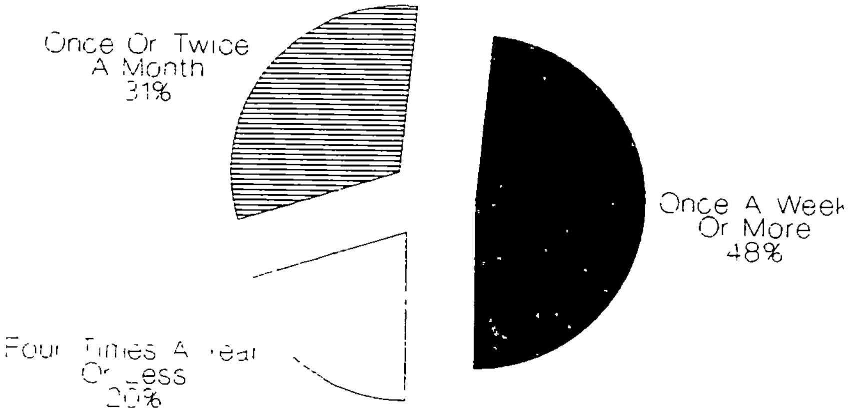
REASONS RESIDENTS DO NOT GAMBLE*

(Among Those Who Do Not Gamble)

	TOTAL
Financial reasons	43%
Don't like losing/wasting money	31
Can't afford it	12
Not interested/it's boring/no fun	20
Moral/ethical reasons	25
Religious objections	10
Don't like the gambling environment	8
It's a bad habit	7
Too risky/odds are against you	7
Other	6
BASE	(351)

* Up to two responses were allowed. Percentages represent the combined (first plus second) response.

FIGURE 7
FREQUENCY OF GAMBLING
(Among Those Who Gamble)



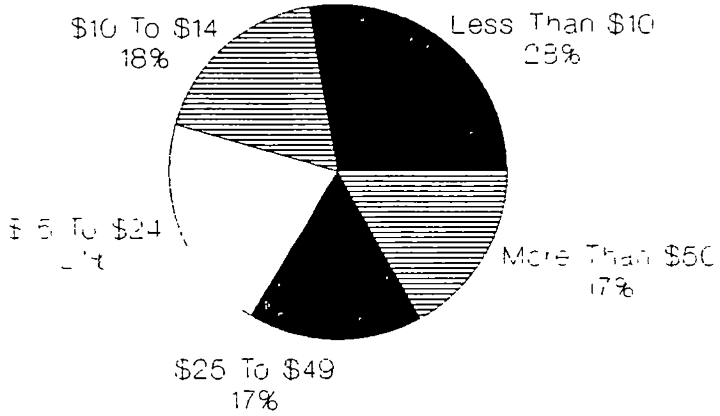
(BASE=649)

We asked all residents who gamble at least occasionally how often they gamble (Figure 7). Nearly one-half of these residents (48%) said they gamble once a week or more, three in ten (31%) gamble once or twice a month, and 20% gamble four times a year or less.

The following respondent subgroups were more likely than others to say they gambled at least once a week:

- Men,
- Respondents 50 years old or older and the retired,
- Respondents who work in a casino, and
- Respondents who gamble *outside* the Strip.

FIGURE 8
AVERAGE GAMBLING BUDGET
(Among Those Who Gamble And Volunteered Budget Information)



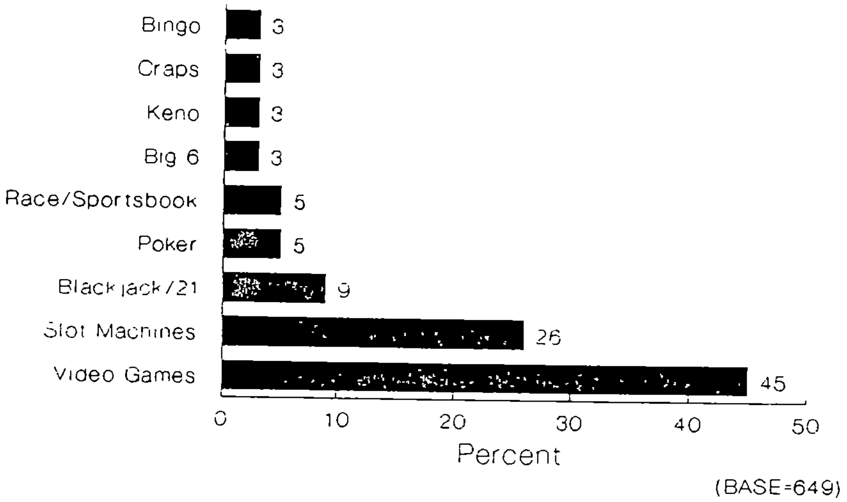
(BASE=527

We then asked residents to tell us the average amount they budgeted for gambling for each day they gambled over the course of a year (Figure 8). Among those who responded to the question, 28% said they budgeted less than $10 per day of gambling, 18% said $10 to $14 per day of gambling, 21% said $15 to $24 per day of gambling, 17% said $25 to $49 per day of gambling, and 17% said $50 or more per day of gambling.

With regard to subgroup differences, we see the following:

- Men were significantly more likely than women to report budgeting $50 or more.
- Not surprisingly, respondents reporting household incomes of less than $20,000 said they budgeted the least on gambling ($10 or less per casino visit).

FIGURE 9
GAMES PLAYED MOST OFTEN
(Among Those Who Gamble)

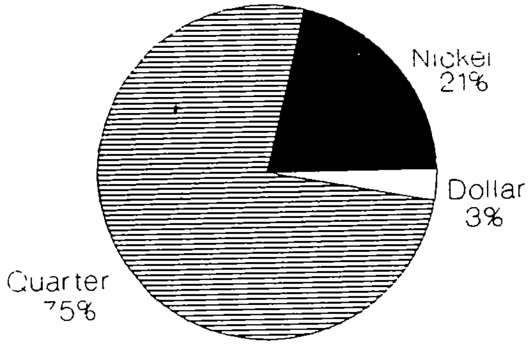


All residents who gamble at least occasionally were asked what game they played most often. Video games proved to be extremely popular among Clark County residents -- even more popular than slot machines (Figure 9). Specifically, Clark County residents who gamble are most likely to play video games (45%) and slot machines (26%), followed more distantly by blackjack (9%), poker (5%), sportsbook or racebook (5% together), Big 6 (3%), keno (3%), craps (3%), and bingo (3%).

There were several subgroup differences of note:

- Women were much more likely than men to say they played slot machines most often. Men were far more likely than women to say they played poker and racebook/sportsbook most often.
- As one would expect, respondents with lower gambling budgets played video games and slot machines most often. Those with gambling budgets of $50 or more per visit, however, were more likely to play blackjack, poker, racebook/sportsbook, and "other" games most often.
- The popularity of video games was especially strong among those who gamble primarily in the outlying areas, and, to a somewhat lesser degree, among those who gamble Downtown or in Henderson. A far higher proportion of those who gamble most often on the Strip than those who gamble elsewhere played blackjack, racebook, sportsbook, and "other" games most often.
- While video games are very popular with all groups, they are much less popular among those 50 years old or older and the retired. The retired were about equally likely to say they played slot machines or video games most often, whereas younger respondents showed a marked preference for video games.

FIGURE 9a
MACHINE DENOMINATION PLAYED MOST OFTEN
(Among Those Who Play Slot & Video Machines Most Often)



(BASE=459)

We next asked those who played video games and slot machines most often which denomination machine they usually played (Figure 9a). By far the greatest preference was for the quarter machines, with 75% of respondents answering that they played them most often. Twenty-one percent (21%) of respondents preferred the nickel machines, and three percent (3%) preferred the dollar machines. Virtually no respondents answered that they play the dime, half dollar, five dollar, or twenty five dollar machines.

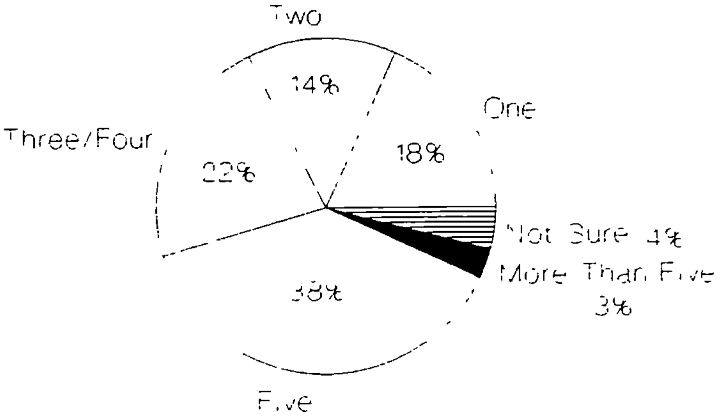
The following are the most noteworthy subgroup differences on this measure:

- Those who gambled most often Downtown were more likely than those who gambled most often elsewhere to say that they play the nickel machines. Those who said that they gambled most often in Henderson and in "other" locations are much more likely than those who gambled most often on the Strip or Downtown to play the quarter machines.

- As we would expect, gambling budget is closely related to denomination of slot and video machines played. Those respondents with the smallest gambling budgets (under $15.00) were more likely than those with larger gambling budgets to play the nickel machines. While quarter machines were popular in every budget range, those with gambling budgets of $15.00 or more were clearly more likely to play them.

FIGURE 9b

NUMBER OF COINS INSERTED PER PLAY (Among Those Who Play Slot & Video Machines Most Often)



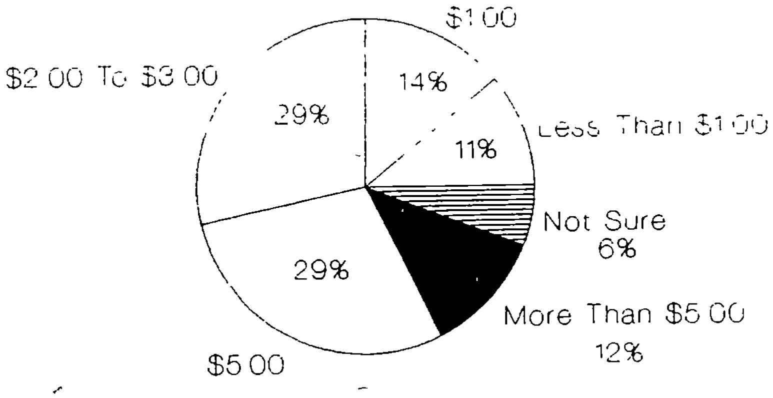
(BASE=459)

Over nine in ten (92%) slot and video machine gamblers play five or fewer coins at a time (Figure 9b), with the most frequent play being five coins at a time (38% of respondents).

The prominent subgroup differences on this measure are as follows:

- Casino workers who gamble at the slot and video machines are far more likely than non-casino workers to play five or more coins at a time.
- Respondents who live in Las Vegas are far more likely than those who live elsewhere to play five coins at a time.
- As expected, the higher the gambling budget, the more likely the respondent is to play five coins at a time; the lower the gambling budget, the more likely the respondent is to play only one coin at a time.

FIGURE 9c
TABLE MINIMUM PLAYED MOST OFTEN (Among Those Who Play Table Games Most Often)

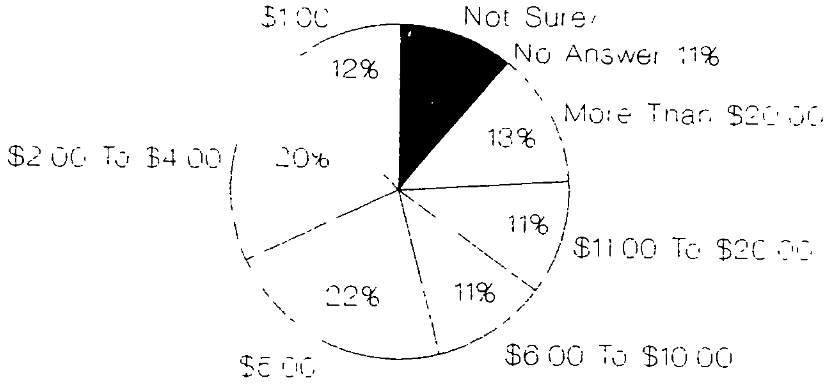


(BASE=113)

We asked residents who said that they play a table game most often to tell us what table minimum they most often played (Figure 9c). Eight in ten respondents (83%) said that they played a table minimum of $5.00 or less, with 29% saying $5.00, 29% saying $2.00 or $3.00, 14% saying $1.00, and 11% saying less than $1.00.

There were too few respondents in this subsample to permit meaningful subgroup analysis.

FIGURE 9d
AVERAGE BET
(Among Those Who Play Table Games, "Other" Games, And Race/Sportsbook)



(BASE=149)

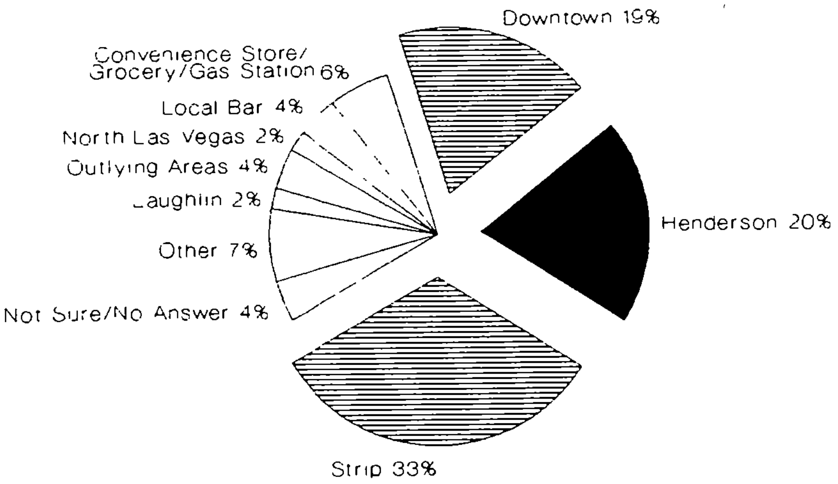
We also asked residents who play table games, race/sportbook, and "other" games most often to tell us their average bet (Figure 9d). Just over one-half of these respondents (54%) said they bet $5.00 or less, with 22% saying $5.00, 20% saying $2.00 to $4.00 and 12% saying $1.00.

There were several notable subgroup differences on this measure, as follows:

- Size of bet is strongly related to gender, with women far more likely than men to bet $4.00 or less and men far more likely than women to bet $6.00 or more.
- Married respondents are more likely to average $4.00 or less per bet, while those who are single or widowed are more likely to average $6.00 or more.
- Average bet shows the expected relationship to gambling budget. Those with budgets of $50.00 or more are most likely to average $6.00 or more per bet, while those with gambling budgets under $15.00 are most likely to average $4.00 or less per bet.

Since relatively few residents of Clark County play either keno or bingo, we were unable to obtain a sample of respondents sufficiently large enough to generate statistically meaningful subgroup results with regard to the average bet per keno game or bingo session.

FIGURE 10
WHERE RESIDENTS GAMBLE MOST OFTEN
(Among Those Who Gamble)



(BASE=649)

All residents who gamble were asked where they gambled most often (Figure 10). One third (33%) of respondents said they gambled most often on the Strip, while about two in ten respondents said they gambled most often in Downtown Las Vegas (19%) or in Henderson (20%). Considerably fewer respondents mentioned other locations such as North Las Vegas (2%), Laughlin (2%), or the outlying areas (4%). In addition, 10% of respondents said they gambled most often in local bars (4%), or in convenience stores, grocery stores, or gas stations (6%).

With regard to subgroup differences, we see the following:

- The Strip continues to attract a higher proportion of those under 30.
- Downtown appears to be more popular among those in the lowest income range (less than $20,000) than among those who earn more. The Strip is most popular among those in the $30,000 to $40,000 income range.

Residents who did not say they gambled most often on the Strip or Downtown were asked why they did not gamble in those locations (Tables 3 and 4). More than four in ten (46%) respondents who do not gamble most often on the Strip said it was because of crowds, traffic, and tourists. Thirteen percent (13%) said the Strip was inconvenient for them to get to, and 9% simply said they preferred to gamble in another area.

Objections to Downtown were similar, with 22% mentioning crowds and traffic, 17% mentioning inconvenience, and 10% saying they preferred another area. However, 11% said they did not go Downtown to gamble because it was dirty or uncomfortable, and another 5% said they did not gamble Downtown because it was not a safe neighborhood.

TABLE 3

REASONS RESIDENTS DO NOT GO TO THE STRIP TO GAMBLE

(Among Those Who Do Not Gamble On The Strip)

	TOTAL
Crowds/traffic	46%
Too crowded	25
Too much traffic	14
Too many/don't like tourists	7
Inconvenience (out of the way/ hard to get to)	13
Prefer another area	9
Prefer Downtown	3
Prefer another area (not Downtown or Strip)	6
Can't afford it	5
Not that interested in gambling	3
Work for casino/hotel	5
Don't like the casinos/hotels	4
No time	1
Other	2
Not sure/no answer	12
BASE	(487)

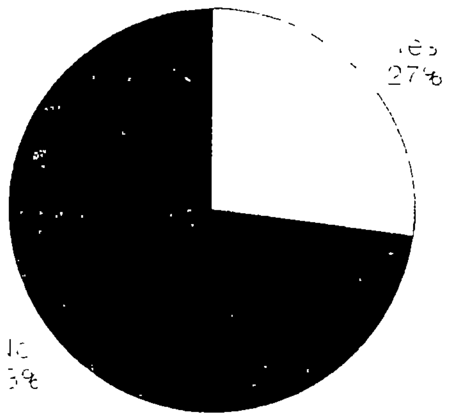
TABLE 4

REASONS RESIDENTS DO NOT GO DOWNTOWN TO GAMBLE

(Among Those Who Do Not Gamble Downtown)

	TOTAL
Crowds/traffic	22%
Too much traffic	5
Too crowded	14
Too many/don't like tourists	3
Inconvenience (out of the way/ hard to get to)	17
Other objections to Downtown	16
Don't like Downtown/it's dirty/uncomfortable	11
Not a safe neighborhood	5
Prefer another area	10
Prefer the Strip	5
Prefer another area (not Downtown or the Strip)	5
Not that interested in gambling	3
Can't afford it/money considerations	3
No time	1
Other	3
Not sure/no answer	21
BASE	(529)

FIGURE 11
PERCENTAGE OF GAMBLERS WHO WOULD LIKE TO GAMBLE MORE OFTEN



(BASE=6[illegible]9

Among those who gamble, about three in ten (27%) said they would like to gamble more often (Figure 11).

The notable subgroup differences are as follows:

- In general, the longer a person has lived in Clark County, the *less* likely they are to say they want to gamble more often. Those who have moved to Las Vegas since 1986 are almost twice as likely to report an interest in gambling more often than are people who were born in Las Vegas.

- Interest in gambling more often increases as gambling budget increases. Those with gambling budgets of over $50.00 report well over twice the interest in gambling more than do those with gambling budgets of less than $10.00.

- As education increases, respondents are less likely to say they want to gamble more often than they do now.

- Respondents with household incomes below $30,000 were significantly more likely than those with higher incomes to express an interest in gambling more often than they do now.

We asked these respondents to tell us in their own words why they do not gamble more often (Table 5). The most frequently mentioned reason by far was that they "can't afford it" (90% of respondents). Some of these respondents also volunteered that they aren't that interested in gambling (13%) and that they don't have the time to gamble (6%).

TABLE 5

REASONS RESIDENTS DO NOT GAMBLE MORE OFTEN*

(Among Those Who Do Not Gamble
As Often As They Would Like)

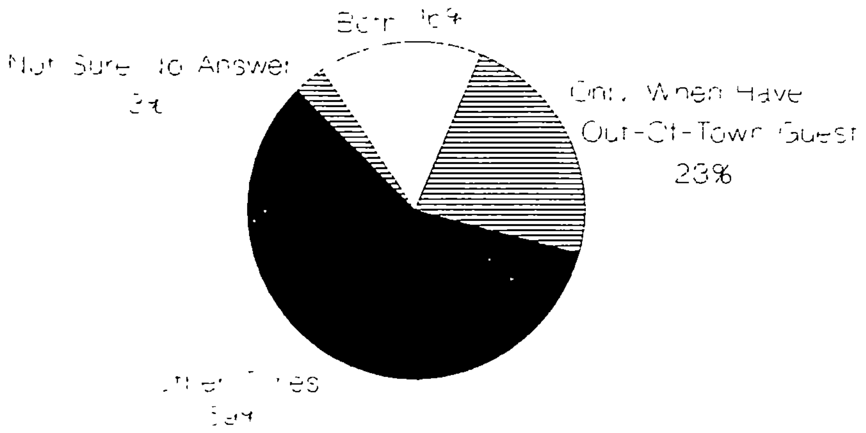
	TOTAL
Can't afford it	90%
Not interested/ don't like gambling that much	13
No time	6
The crowds	2
Other	5
BASE	(175)

* Up to two responses were allowed. Percentages represent the combined (first plus second) response.

FIGURE 12

WHEN RESIDENTS GAMBLE

(Among Those Who Gamble)



(BASE=644)

We also asked residents who gamble if they gambled only when they had out-of-town visitors or if they gambled at other times (Figure 12). About one-quarter (23%) of these respondents said they *only* gambled when they had out-of-town visitors . However, three-quarters (75%) of residents who gamble said they gambled at other times (59%) or at other times *and* when they have out-of-town guests (16%). Looking at subgroup differences, we see the following:

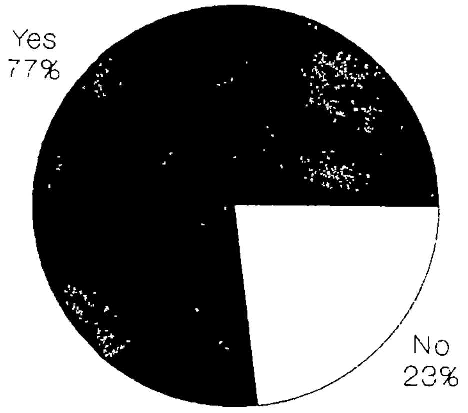
- Women were much more likely than men to say they gambled only when they had out-of-town guests.
- Residents who gamble primarily on the Strip were more likely than those who gamble elsewhere to say they gambled only when they have out-of-town guests.

Casino Gambling

We next asked residents who gamble if they ever go to a casino to gamble (Figure 13). Nearly eight in ten (77%) said they did.

Since 65% of all residents gamble, that means 50% of *all* residents sometimes gamble in a casino (that is, 65% times 77%).

FIGURE 13
PERCENTAGE OF GAMBLERS WHO GAMBLE IN CASINOS

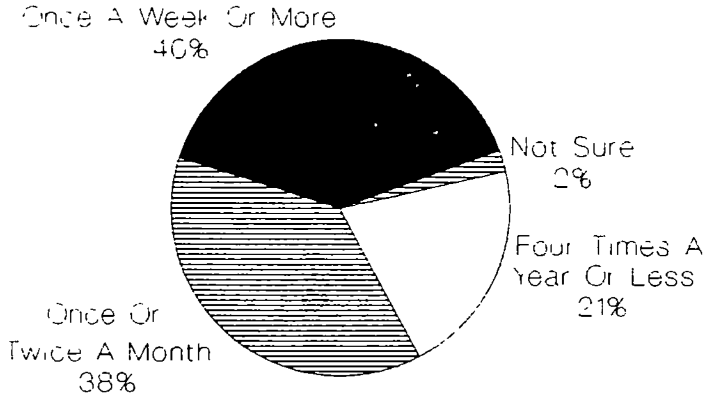


(BASE=649)

With regard to subgroup differences we see the following:

- Those with gambling budgets of $15.00 or more are more likely than those with gambling budgets of less than $15.00 to have been to a casino to gamble.
- As one would expect, those who say they gamble most often on the Strip or Downtown are more likely than those who say they gamble most often in "other" places to have been to a casino to gamble.

FIGURE 14
FREQUENCY OF GAMBLING IN A CASINO
(Among Those Who Gamble In Casinos)



(BASE=602)

Residents who gamble in casinos were then asked how often they do so (Figure 14). Nearly eight in ten respondents (78%) who gamble in a casino said they do so at least once a month -- with four in ten of these respondents (40%) saying once a week or more, and another 38% saying once or twice a month. Two in ten respondents (21%) said they gambled in a casino four times a year or less.

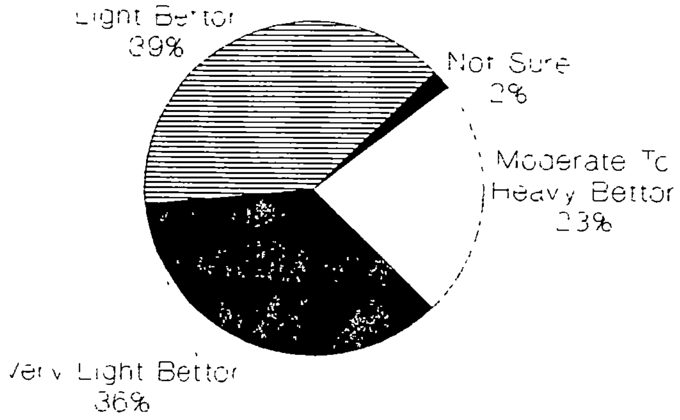
The following respondent subgroups were most likely to say they gambled in a casino at least once a week:

- Men,
- Those 50 years old or older and the retired,
- Respondents without children,
- Those who gamble most often in Downtown Las Vegas, and
- Those with the largest gambling budgets ($50.00 or higher).

If we compare Figure 7 (the frequency of gambling in any location) to Figure 14 (the frequency of gambling in a casino), we see that a somewhat higher proportion of residents said they gamble once a week or more at all locations (48%) than said they gamble once a week or more at a casino (40%), probably reflecting the easy accessibility of slot machines and video games at a variety of locations outside casinos.

FIGURE 15

SELF-DESCRIPTION OF BETTING HABITS
(Among Those Who Gamble In Casinos)

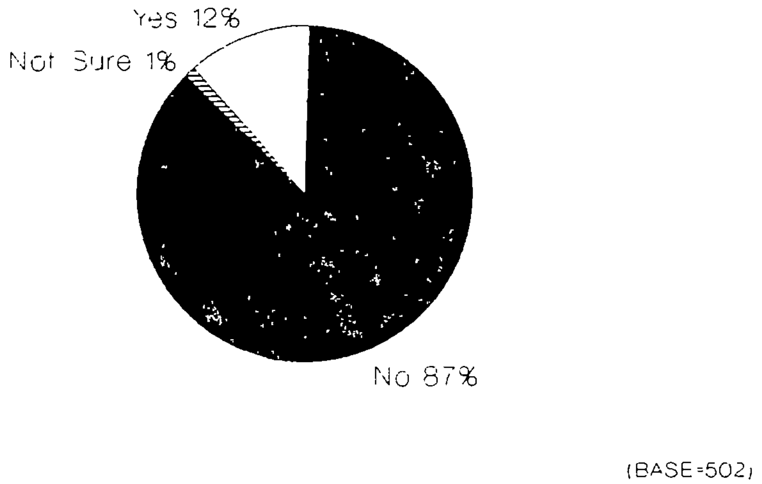


(BASE=502)

We asked residents who gamble in casinos to tell us if they considered themselves to be very light, light, moderate, somewhat heavy, or very heavy bettors (Figure 15). Most (75%) considered themselves to be either very light (36%) or light (39%) bettors. Only one-quarter (23%) of these respondents considered themselves to be moderate to heavy bettors.

Looking at subgroup differences, we see that women are significantly more likely than men to describe themselves as "very light" bettors.

FIGURE 16
PERCENTAGE OF RESIDENTS WHO MAINTAIN CASINO CREDIT
(Among Those Who Gamble In Casinos)



We asked residents who gamble if they maintain casino credit (Figure 16). Relatively few (12%) said they did.

Two subgroups stand out here:

- Those 50 years old or older and the retired are more likely than younger respondents to say they maintain casino credit.
- As one would expect, those whose typical casino gambling budget is $50.00 or more are more likely than those who budget less to maintain casino credit.

Gaming Revenues

On the Clark County residents survey, we asked respondents to tell us whether they engaged in legalized gambling even occasionally, how often they gambled, and how much they budgeted on gambling. Nearly two-thirds (65%) of these adult residents said they engaged in legalized gambling at least occasionally.

To determine legalized gambling frequency, interviewers read respondents a list of frequency categories, and respondents identified the category which best described their behavior. The frequency categories were:

More than five times a week
About twice a week
About once a week
About twice a month
About once a month
About four times a year
About twice a year
Once a year or less.

To determine gambling budgets, respondents were asked: "On average, about how much money do you personally budget on gambling per ...(day, week, month or year)?" The choice of time period asked depended on whether the respondent described their gambling frequency in terms of times per week, month, or year respectively.

We calculated the mean budget for each of the several time period categories with the following results:

Gambling frequency period	Budget amount
Daily	$ 48.10
Weekly	63.59
Monthly	32.29
Yearly	75.49

Next we calculated the total yearly amount budgeted on legalized gambling by all respondents, multiplying the frequency period *times* the mean budget per period *times* the number of respondents in each frequency period category, as follows:

Gambling frequency period	Frequency (periods/year)	Mean budget per period	Number of respondents
Daily (5 times per week)	260	$ 48.10	48
Weekly	52	63.59	264
Monthly	12	32.29	204
Yearly	1	75.49	131
Don't gamble/no data	0	0.00	353

The sum of these calculations is $1,562,186.63 -- the total amount budgeted on legalized gambling per year among 1,000 randomly chosen Clark County residents.

Clark County has a total estimated adult population of 520,000 or 520 *times* 1000 people. Since the estimated amount budgeted on legalized gambling per year per 1000 Clark County residents is $1,562,186.63, then the estimated annual amount budgeted by *all* Clark County adult residents on casino gambling is 520 *times* $1,562,186.63, or just over $812 million ($812,337,047.60).

The accuracy of this estimate is necessarily limited by measurement error inherent in the nature of the questions asked and in the psychology of the respondents.

The categories used for the frequency of legalized gambling were purposely designed to be approximations ("*about* twice a week, *about* once a week" etc.) because it was felt that respondents would be unable accurately to recall the exact number of times they went to a casino to gamble over the past year. Because the frequency categories are approximate by design, the numbers we use to represent these categories in calculating the estimate are subject to error.

For example, a respondent who says he does legalized gambling "*about* once a week" may, in fact, go more or less than 52 times a year. For the sake of the estimate, we must *assume* that the mean for all respondents who said "*about* once a week" is 52, because we do not know the *actual* number of times per year that these respondents engaged in legalized gambling. The mean for these respondents might, in fact, be higher or lower than 52, but we cannot know that since we do not know the actual frequency of legalized gambling for each respondent.

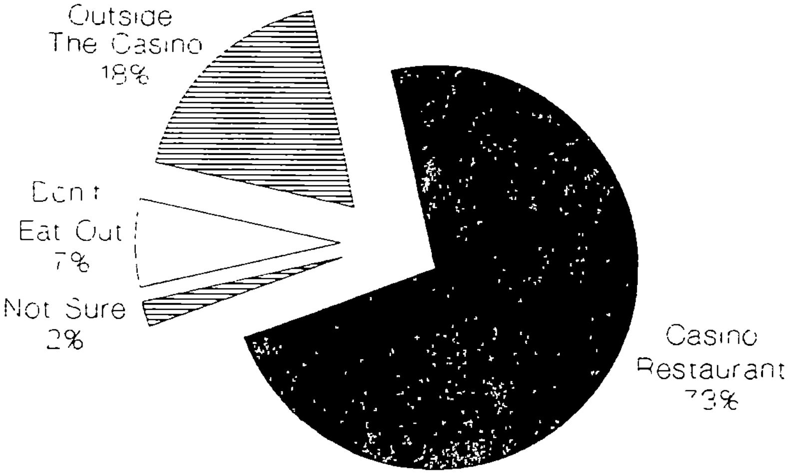
With regard to the amount budgeted on legalized gambling per time period (day, week, month, year), we asked respondents to give us an exact dollar amount which represented an estimate of their *average* budget per time period. Even though respondents were asked to give an exact amount, the amount might be an over- or underestimate of the average amount actually budgeted per time period. Again, since we cannot know how accurately respondents reported the amount they budget, we *assume* for the sake of the estimate that the average amount reported is accurate.

Furthermore, the estimate represents the potential total dollar amount *budgeted* per year on legalized gambling. This figure is not meant to reflect the total amount actually *spent* on legalized gambling per year by Clark County residents, and we suspect that budgeted amounts are considerably higher than the amounts actually spent. Therefore, in determining potential total gaming *revenues*, our estimate should probably be taken as the high end of any revenue projection.

Restaurants

We asked residents who go to a casino to gamble if they usually eat in a casino restaurant or in a restaurant outside the casino when they gamble (Figure 17). Nearly three-quarters (73%) of these respondents said they usually eat at a casino restaurant, 18% eat outside the casino, 7% volunteered that they do not eat when they gamble at a casino, and 2% were not sure.

FIGURE 17
WHERE RESIDENTS EAT WHEN GAMBLING IN A CASINO



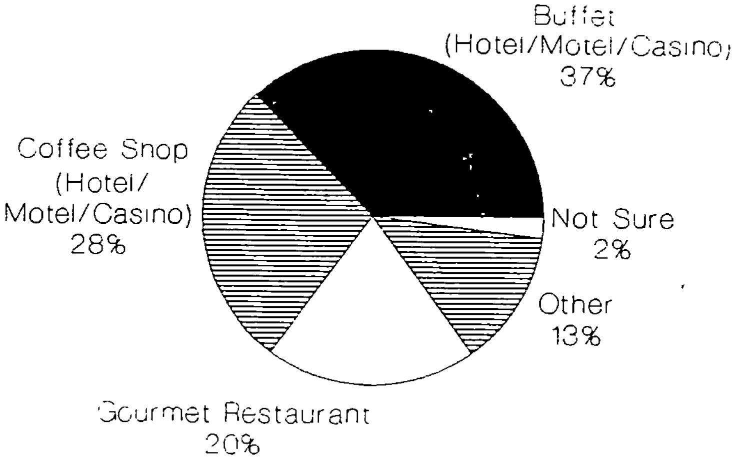
(BASE=502)

Looking at subgroup differences, we see the following:

- Respondents who are 40 years old or older are more likely than younger respondents to say they eat in casino restaurants.
- Respondents with teenage children or no children are more likely than those with younger children to say they eat in casino restaurants.

FIGURE 18

TYPE OF RESTAURANT USUALLY PATRONIZED WHEN GAMBLING IN A CASINO



(BASE=453)

A plurality (37%) of residents who eat out when they go to a casino to gamble usually eat at a buffet in a hotel, motel, or casino (Figure 18). Almost three in ten (28%) of respondents said they usually eat at a coffee shop in a hotel, motel, or casino, and two in ten (20%) said they eat at a gourmet restaurant. Thirteen percent (13%) of residents said they eat in other locations.

Income, gender, and place where residents do most of their gambling appear to affect choice of the type of restaurant. Income is probably the prime factor underlying all other subgroup differences on this measure:

- Those with household incomes of $20,000 a year or less are most likely to say they usually eat at a buffet.

  Those whose household incomes are $30,000 or more are far more likely than those who earn less to say they usually eat in gourmet restaurants.

- Those 65 years old or older and the retired are more likely than others to eat at a buffet.

- Men are far more likely than women to say they eat in a gourmet restaurant when gambling at a casino. Women are more likely than men to say that they eat in a buffet.

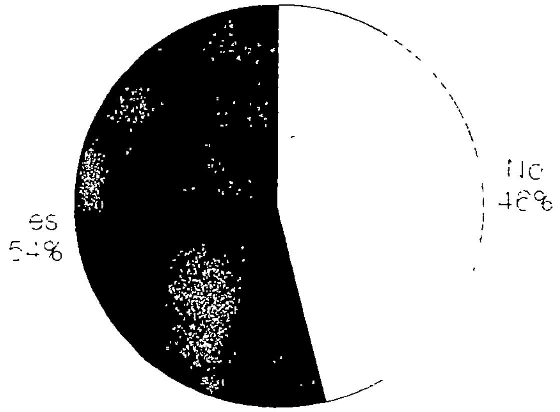
- Those who gamble Downtown are least likely of all groups to eat in a buffet and most likely to eat in a coffee shop.

- Residents who gamble in Henderson or Downtown are more likely than those who gamble on the Strip or in "other" locations to say that they eat in a gourmet restaurant.

Entertainment

Fifty-four percent (54%) of all residents said they had been to a casino show (Figure 19a).

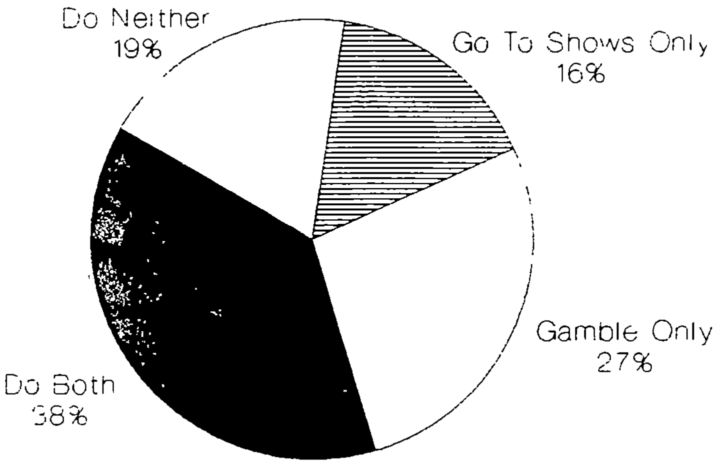
FIGURE 19a
PERCENTAGE OF RESIDENTS WHO EVER GO TO CASINO SHOWS



Following are the most important subgroup differences among those who had (or had not) been to a casino show:

- The likelihood of having ever attended a casino show increases with education.
- There is a directional tendency for those with higher household incomes to be more likely than those with lower incomes to have attended a casino show.
- Those who gamble most often on the Strip or in Henderson are more likely than those who gamble most often Downtown or in "other" places to say they have attended a casino show.

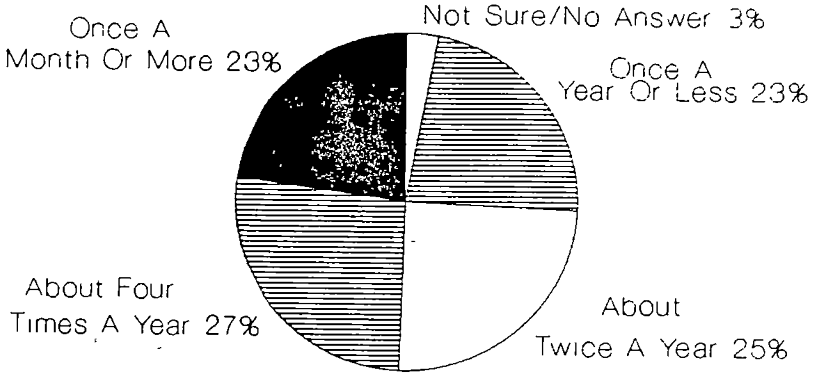
FIGURE 19b
RELATIONSHIP BETWEEN GAMBLING AND CASINO SHOW ATTENDANCE



With regard to the relationship between gambling and casino show attendance among all residents, we see the following (Figure 19b):

- Thirty-eight percent (38%) of Clark County residents both gamble and go to casino shows.
- Twenty-seven percent (27%) gamble but do not go to casino shows.
- Sixteen percent (16%) go to casino shows but do not gamble.
- Nineteen percent (19%) neither gamble nor go to casino shows.

FIGURE 20
HOW OFTEN RESIDENTS GO TO A CASINO SHOW
(Among Those Who Go To Casino Shows)



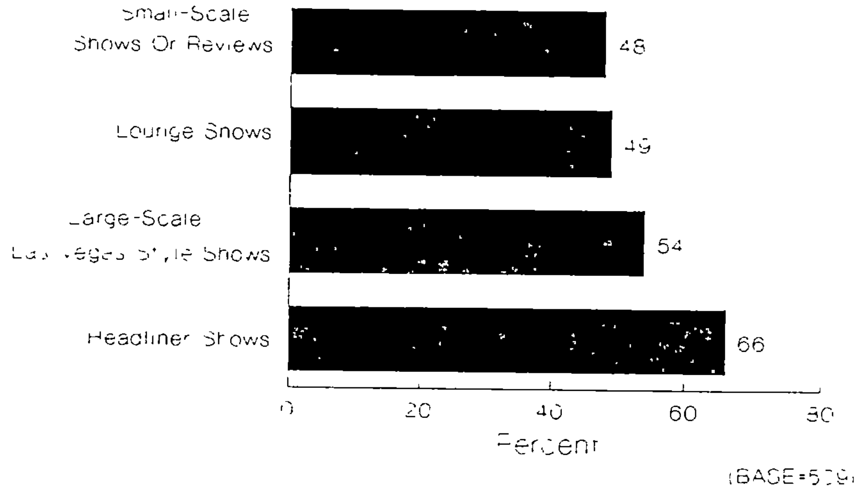
(BASE=539)

We asked those who had been to a casino show about how often they went (Figure 20). Nearly one-quarter (23%) said they attend casino shows once a month or more frequently, 27% said four times a year, 25% said twice a year, and 23% said once a year or less.

Looking at subgroup differences, we see that those who have moved to Las Vegas since 1986 are much more likely than those who moved to Las Vegas before 1986 to attend casino shows frequently, probably because the shows are still an exciting novelty to them.

FIGURE 21

TYPE OF CASINO SHOWS ATTENDED
(Among Those Who Have Been To Casino Shows)



Among those who have ever been to a casino show, 66% have been to a headliner show, 54% to a large-scale Las Vegas style show, 49% to a lounge show, and 48% to a small-scale revue (Figure 21).

Looking at important subgroup differences, we see the following:

- Women were much more likely than men to have attended a headliner show.
- Gamblers were much more likely than non-gamblers to have been to large-scale shows and lounge shows.
- Men were significantly more likely than women to say that they have attended a small-scale show. Those who are either under the age of 30 or over the age of 50 were also more likely to have attended these small-scale shows.

APPENDIX

QUESTIONNAIRE WITH MARGINAL RESULTS

GLS RESEARCH
R&R ADVERTISING/LVCVA
CLARK COUNTY RESIDENTS STUDY
PROJECT #90309

MARGINALS
OCTOBER 1990

Card #1

Respondent ID# __ __ __ __

Time Started ________________

Time Ended ________________

Interview Length 13.9 MINUTES (MEAN)

Interviewer ________________

Interviewer # __ __

Edited by __ __

Coded by __ __

Date ____________________

Rep & page # ____________________

GENDER	
MALE	47%
FEMALE	53

Hello. I'm ____________ from Research and Decisions Corporation, a national marketing research firm. We are conducting a survey among Las Vegas residents and would like to ask you a few questions about travel and leisure activities. All answers are kept strictly confidential.

1. We are supposed to interview people who are 21 years old or older. Are you 21 years old or older?

YES	ASK Q2
NO NOT SURE/DK REFUSED/NA	TERMINATE

2. Do you live in Clark County, Nevada (that is, the Las Vegas area)?

YES	ASK Q3
NO NOT SURE/DK REFUSED/NA	TERMINATE

3. In general, have things been going better or worse for you this year than last year?

BETTER	52%
WORSE	21
SAME (VOL.) ...	26
NOT SURE/DK ...	1
REFUSED/NA	0

4. What activities do you take part in during your leisure time over the course of a year? I'm interested in activities *outside your home* which you can do *in and around Las Vegas*. (ACCEPT UP TO 5 RESPONSES. PROBE:) Any others?

5. Which of the activities you just mentioned do you do most often? (IF NECESSARY, READ "YES" RESPONSES BACK TO RESPONDENT TO REFRESH HIS/HER MEMORY.)

6. Which of the activities you just mentioned is your favorite? (AGAIN, IF NECESSARY, READ "YES" RESPONSES BACK TO RESPONDENT TO REFRESH HIS/HER MEMORY)

	Q4 YES	Q5 MOST OFTEN	Q6 FAVORITE	
BINGO	6%	1%	2%	BINGO
BOATING	17	3	4	BOATING
BOWLING	15	2	3	BOWLING
CAMPING	23	5	7	CAMPING
COMMUNITY ACTIVITIES (CHURCH, LITTLE LEAGUE, ETC.)	22	8	6	COMMUNITY ACTIVITIES (CHURCH, LITTLE LEAGUE, ETC.)
CYCLING	10	1	1	CYCLING
FISHING	20	4	4	FISHING
EATING OUT	56	17	12	EATING OUT
GAMBLING	27	5	5	GAMBLING
GOLF	12	5	7	GOLF
HIKING	14	3	4	HIKING
HORSEBACK RIDING	5	2	3	HORSEBACK RIDING
HUNTING	6	1	2	HUNTING
MOVIES	35	7	7	MOVIES
NIGHT CLUBBING	10	3	2	NIGHT CLUBBING
PICNICS	16	2	2	PICNICS
SHOPPING	30	8	7	SHOPPING
SHOWS	13	1	2	SHOWS
SIGHT SEEING	13	2	2	SIGHT SEEING
SNOW SKIING	6	1	2	SNOW SKIING
SPORTING EVENTS	13	3	4	SPORTING EVENTS
SUNBATHING	4	1	1	SUNBATHING
SWIMMING	15	3	3	SWIMMING
TENNIS	3	1	1	TENNIS
VISITING FRIENDS OR RELATIVES	23	7	6	VISITING FRIENDS OR RELATIVES
WATER SKIING	5	1	2	WATER SKIING
WORKING OUT	11	5	3	WORKING OUT

I'd like to ask you a few questions about legalized gambling. By *legalized gambling* I mean all games of chance, including bingo, sports book, slot machines, and video gambling games as well as casino-type games. I'm interested in all the legalized gambling you may do, whether it's at a casino or at some other public location -- for instance, a convenience store, restaurant, or gas station. (INTERVIEWER: IF RESPONDENT ASKS IF GAMBLING INCLUDES PRIVATE CARD PARTIES IN PEOPLE'S HOMES WHERE BETTING OCCURS, SAY "NO.")

7 First, do you gamble even occasionally?

YES...........	65%	SKIP TO Q9
NO	35	ASK Q8 THEN SKIP TO Q32 ON PAGE 6
REFUSED/NA....	0	

8. People have many different reasons for choosing not to gamble. What is the primary reason you choose not to gamble? Any other reason? (ACCEPT UP TO 2 RESPONSES.)

(SEE APPENDIX)

SKIP TO Q32 ON PAGE 6

9. About how often do you gamble? Would you say it is .. (READ LIST CIRCLE NUMBER AT FIRST "YES" RESPONSE.)

More than 5 times a week ..	7%	ASK Q10
About twice a week	19	SKIP TO Q11
About once a week	22	
About twice a month	15	SKIP TO Q12
About once a month	16	
About four times a year ..	13	(N=649)
About twice a year	5	SKIP TO Q13
Once a year or less	2	
NOT SURE/DK ...	0	SKIP TO Q14
REFUSED/NA	0	

10. On average, about how much money do you personally budget on gambling per *DAY*. (N=48)

$ 48.10 (MEAN) $20 00 (MEDIAN)

SKIP TO Q14

11. On average, about how much money do you personally budget on gambling per *WEEK*. (N=264)

$ 63.59 (MEAN) $ 20 00 (MEDIAN)

SKIP TO Q14

12. On average, about how much money do you personally budget on gambling per *MONTH*. (N=204)

$ 32.29 (MEAN) $ 20.00 (MEDIAN)

SKIP TO Q14

13. On average, about how much money do you personally budget on gambling per *YEAR*. (N=131)

$ 75.49 (MEAN) $ 35.00 (MEDIAN)

14. Which type of gambling game do you play *MOST OFTEN*. (DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE.)

SLOT MACHINES.	26%	ASK Q15
VIDEO POKER/21/ KENO MACHINES.	45	
BACCARAT......	0	SKIP TO Q17
BIG 6.........	3	
BINGO.........	3	SKIP TO Q19
BLACKJACK.....	9	SKIP TO Q17
CRAPS.........	3	
KENO..........	3	SKIP TO Q19
POKER.........	5	SKIP TO Q17
RACE/SPORTSBOOK	5	SKIP TO Q18
ROULETTE......	0	SKIP TO Q17
OTHER.........	1	SKIP TO Q18
NOT SURE/DK...	0	SKIP TO Q20
REFUSED/NA....	0	

---

15. Which denomination machine do you play *MOST OFTEN* (DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)

NICKEL...........	21%	
DIME.	0	
QUARTER..........	75	
HALF DOLLAR......	0	
DOLLAR...........	3	
FIVE DOLLARS.....	0	(N=459)
25 DOLLARS.... ..	0	
OTHER............	0	
NOT SURE/DK......	0	
REFUSED/NA... ...	0	

CONTINUE WITH Q16

16. On the average, how many coins/tokens do you usually insert before each play on a machine? (INTERVIEWER: IF RESPONDENT SAYS "MAXIMUM," ASK: "How many would that be on the average?") (N=459)

3.7 (MEAN) 3.0 (MEDIAN)

SKIP TO Q20

---

17. What table minimum do you play *MOST OFTEN*. (DO *NOT* READ LIST. ACCEPT ONLY ONE RESPONSE.)

LESS THAN $1.00 .	11%	
$1.00	14	
$2.00	28	
$3.00	1	
$5.00	29	
$10.00	4	
$25.00	4	(N=113)
$50.00	1	
OVER $50.00	2	
OTHER	1	
NOT SURE/DK	4	
REFUSED/NA	2	

CONTINUE WITH Q18

18. What is your average bet? (WRITE AMOUNT IN BLANKS BELOW.) (N=149)

$ 20.68 (MEAN) $ 5.00 (MEDIAN)

SKIP TO Q20

---

19. On the average, how much do you bet per (keno game or bingo session)? (WRITE AMOUNT IN BLANKS BELOW.) (N=37)

$ 40.19 (MEAN) $ 2.50 (MEDIAN)

CONTINUE WITH Q20

---

20. Where do you do *MOST* of your gambling -- on the "Strip," in downtown Las Vegas, or elsewhere? (IF "ELSEWHERE," ASK:) What is the name of that area? (ACCEPT ONLY ONE RESPONSE.)

STRIP..........	33%	SKIP TO Q22
DOWNTOWN.......	19	ASK Q21, THEN SKIP TO Q23
ELSEWHERE:		
BOULDER HWY. AND HENDERSON (SAM'S TOWN, ELDORADO, GOLD STRIKE).	20	(N=649)
LAUGHLIN.....	2	
NORTH LAS VEGAS	2	
OUTLYING AREAS (JEAN, MESQUITE, PAHRUMP, SEARCHLIGHT).......	4	ASK Q21 & Q22
CONVENIENCE STORE/GROCERY/ GAS STATION..	6	
LOCAL BAR....	4	
OTHER..........	7	
NOT SURE/DK....	3	
REFUSED/NA.....	1	

21. Is there any particular reason why you do not go to the Strip (more often) to gamble? (ACCEPT ONE RESPONSE)

(SEE APPENDIX)

22 Is there any particular reason why you do not go to downtown Las Vegas (more often) to gamble? (ACCEPT ONE RESPONSE.)

(SEE APPENDIX)

23. Would you like to gamble more often than you do now?

YES...........	27%	ASK Q24
NO....	73	(N=649)
REFUSED/NA....	1	SKIP TO Q25

24. What is the primary reason you don't gamble more often than you do now? Any other reason? (ACCEPT UP TO 2 RESPONSES.)

(SEE APPENDIX)

25. Do you only gamble when you have out-of-town visitors or do you gamble at other times as well?

ONLY WHEN HAVE OUT-OF-TOWN VISITORS..........	23%	
OTHER TIMES	59	
BOTH (VOL.)	16	(N=649)
NOT SURE/DK	2	
REFUSED/NA	1	

26. Do you ever go to a casino to gamble?

YES	77%	ASK Q27
NO	23	(N=649)
NOT SURE/DK ..	0	SKIP TO Q32
REFUSED/NA ...	0	ON PAGE 6

27. About how often do you go to a casino to gamble? Would you say it is...

More than 5 times a week	5%	
About twice a week ..	17	
About once a week ...	18	
About twice a month .	17	
About once a month ..	21	
About four times a year	10	(N=502)
About twice a year ..	8	
Once a year or less .	3	
NOT SURE/DK	2	
REFUSED/NA	0	

28. Which of the following categories best describes your betting habits in the casinos? Are you a... (READ LIST.)

Very light bettor	36%	
Light bettor	39	
Moderate bettor	21	
Somewhat heavy bettor	1	(N=502)
Heavy bettor	1	
NOT SURE/DK	2	
REFUSED/NA	0	

29. Do you maintain casino credit?

YES	12%	
NO	87	(N=502)
NOT SURE/DK	1	
REFUSED/NA	0	

30. When you go to a casino to gamble, do you also usually eat at a casino restaurant or at a restaurant outside the casino?

CASINO RESTAURANT	73%	
RESTAURANT OUTSIDE THE CASINO	18	ASK Q31
DON'T EAT OUT (VOL.)	7	(N=502)
NOT SURE/DK	2	SKIP TO Q32
REFUSED/NA	0	

31. When you go to a casino to gamble, what type of restaurant do you usually eat in? Is it a... (READ LIST. IF RESPONDENT GIVES THE NAME OF A RESTAURANT, PROBE:) What type of restaurant is that? (RECORD BOTH NAME AND TYPE OF RESTAURANT UNDER "OTHER".)

Fast food restaurant	6%	
Buffet in a hotel, motel, or casino	37	
Coffee shop in a hotel, motel, or casino	28	
Coffee shop outside a hotel, motel, or casino	3	
Gourmet restaurant	20	(N=453)
OTHER	4	
NOT SURE/DK	2	
REFUSED/NA	0	

32. Do you ever go to any of the shows which the casinos offer?

YES	54%	ASK Q33
NO	45	
NOT SURE/DK	0	SKIP TO Q35
REFUSED/NA	0	ON PAGE 7

33. About how often do you go to a casino show? Would you say it is... (READ LIST. CIRCLE NUMBER AT FIRST "YES" RESPONSE.)

About once a week	3%	
About twice a month	6	
About once a month	14	
About four times a year	27	(N=539)
About twice a year	25	
Once a year or less	23	
NOT SURE/DK	2	
REFUSED/NA	1	

34. Which of the following kinds of shows have you been to? (READ LIST. ACCEPT MULTIPLE RESPONSES.)

	YES	
Headliner shows (big-name stars).........	66%	
Large-scale Las Vegas style shows........	54	
Small-scale shows or reviews.............	48	(N=539)
Lounge shows (local bands)...............	49	
NONE OF THE ABOVE........................	1	
NOT SURE/DK..............................	0	
REFUSED/NA...............................	1	

* * * * * * * * * * * * * *

35. Do you ever visit the Lake Mead recreational area?

YES...........	70%	ASK Q36
NO............	30	
NOT SURE/DK...	0	SKIP TO Q40
REFUSED/NA....	0	ON PAGE 8

36. How many times did you go to Lake Mead during the past year? (FILL IN EXACT AMOUNT *AND CIRCLE APPROPRIATE CATEGORY BELOW.*)

11.1 (MEAN) 4.0 (MEDIAN)

NONE...........	8%	SKIP TO Q39 ON PAGE 8
ONE............	14	
TWO............	17	
THREE..........	10	ASK Q37
FOUR...........	8	(N=697)
FIVE...........	5	
MORE THAN FIVE.	36	
NOT SURE/DK....	1	SKIP TO Q39
REFUSED/NA.....	0	ON PAGE 8

37. Thinking now only about your *last* trip to Lake Mead, how many days did you spend there? (FILL IN EXACT AMOUNT *AND CIRCLE APPROPRIATE CATEGORY BELOW.*)

1.5 (MEAN) 1.0 (MEDIAN)

1 DAY	80%	
2 TO 3 DAYS	14	
4 TO 7 DAYS	3	
8 TO 14 DAYS	1	(N=636)
15 DAYS OR MORE	1	
NOT SURE/DK	2	
REFUSED/NA	0	

38. On your last trip to Lake Mead, what was the approximate *TOTAL* amount you spent on... (N=636)

a. Food and beverages?

$ 23.74 (MEAN) $ 15.00 (MEDIAN)

b. Gasoline? (Include car *and* boat if you have one)

$ 18.57 (MEAN) $10 00 (MEDIAN)

c. All other expenses?

$ 6.26 (MEAN) $ 0 00 (MEDIAN)

39. When you go to Lake Mead, which of the following leisure activities do you participate in? (START WITH ITEM CHECKED AND CONTINUE UNTIL ALL ITEMS ARE ASKED.)

START		Q39 YES	
[ ]	a. Swimming..........	56%	
[ ]	b. Tennis............	3	
[ ]	c. Hiking............	27	
[ ]	d. Camping...........	28	
[ ]	e. Boating..	45	(N=697)
[ ]	f. Water skiing.......	29	
[ ]	g. Horseback riding...	4	
[ ]	h. Sunbathing.........	44	
[ ]	i. Fishing...........	41	

40. Have you heard or read anything about the Las Vegas Convention and Visitors Authority (also known as the LVCVA)?

YES..........	58%	ASK Q41
NO...........	40	
NOT SURE/DK..	3	SKIP TO Q42
REFUSED/NA...	0	

41. Would you say that you have a <u>favorable</u> or <u>unfavorable</u> opinion of the Las Vegas Convention and Visitors Authority?

FAVORABLE......	73%	
UNFAVORABLE....	5	(N=575)
NOT SURE/DK....	20	
REFUSED/NA.....	1	

42. As you may or may not know, the Las Vegas Convention and Visitors Authority is an organization responsible for bringing conventions and tourists to Las Vegas.

How good a job do you think the Las Vegas Convention and Visitors Authority is doing in bringing conventions and tourists to Las Vegas? Would you say they're doing an excellent job, a good job, a fair job, or a poor job?

EXCELLENT	25%
GOOD	45
FAIR	10
POOR	3
NOT SURE/DK ...	16
REFUSED/NA	I

43. How do you think the Las Vegas Convention and Visitors Authority is funded? Is it funded through local tax dollars which Las Vegas residents pay or is it funded through hotel tax dollars which visitors to Las Vegas pay when they stay at Las Vegas hotels?

LOCAL TAX	9%
HOTEL TAX	37
BOTH (VOL.) ...	11
NOT SURE/DK ...	42
REFUSED/NA	1

* * * * * * * * * * * * * *

Now I'd like to ask you some questions just for classification purposes. As I mentioned before, all your answers will be kept strictly confidential.

44. What is your employment situation? Are you... (READ LIST.)

Employed full time....	54%	
Employed part time....	8	ASK Q45 & Q46
Self-employed.........	8	
Not employed for pay..	12	
Retired...............	15	SKIP TO Q48
Student...............	1	ON PAGE 9
REFUSED/NA............	2	

45. What kind of work do you do?

46. What industry is that in?

(PROBE FOR JOB TITLE AND/OR LISTEN CAREFULLY TO JOB DESCRIPTION AND THE KIND OF COMPANY WORKED FOR. FILL IN THE BLANKS BELOW.)

Job description/title ______________________

Industry ______________________

JOB CATEGORIES (FOR CODERS' USE ONLY)		
PROFESSIONAL/ TECHNICAL............	22%	
MANAGERS/OFFICIALS/ PROPRIETORS..........	8	
SALES/CLERICAL WORKERS	19	
CRAFT WORKERS/FOREMEN.	13	(N=694)
SERVICE WORKERS/ OPERATORS............	34	
LABORERS/AGRICULTURAL WORKERS..............	0	
OTHER................	0	
NOT SURE/DK..........	0	
REFUSED/NA...........	4	

INDUSTRY CATEGORIES (FOR CODER'S USE ONLY)		
MINING...............	0%	
CONSTRUCTION.........	9	
MANUFACTURING........	2	
TRANSPORTATION, COMMUNICATIONS, ELECTRIC, GAS, & SANITARY.............	7	
WHOLESALE TRADE......	1	
RETAIL TRADE.........	16	(N=694)
FINANCE, INSURANCE, & REAL ESTATE........	8	
SERVICES.............	48	
AGRICULTURE/FORESTRY .	1	
PUBLIC ADMINISTRATION	4	
OTHER................	0	
NOT SURE/DK..........	0	
REFUSED/NA...........	4	

* * * * * * * * * * * * * * *

47. Do you work for any of the casinos or casino/hotels in Las Vegas?

YES..............	23%	
NO...............	74	(N=694)
NOT SURE/DK......	1	
REFUSED/NA.......	3	

48. What year did you move to the Las Vegas area, or where you born here?

1978 (MEAN)
1981 (MEDIAN)
1988 (MODE)

(EXCLUDES THOSE BORN IN CLARK COUNTY)

BORN HERE.......	8%
1960 OR BEFORE ..	8
1961 TO 1965	6
1966 TO 1970	8
1971 TO 1975	7
1976 TO 1980	14
1981 TO 1985	13
1986 TO PRESENT .	34
REFUSED/NA	1

49. Do you live in Las Vegas year round, or are you a part-time resident?

YEAR ROUND.......	94%
PART-TIME........	3
NOT SURE/DK......	0
REFUSED/NA.......	2

50. What is your ZIP code?

(SEE APPENDIX)

ALL ZIPS MUST BEGIN WITH 890- OR 891-

51. Do you own your home or do you rent?

OWN (OR BUYING)..	58%
RENT (OR BOARDING)	40
NOT SURE/DK......	0
REFUSED/NA.......	2

52. What was the last grade or year of school that you completed? (DO NOT READ LIST.)

GRADE SCHOOL OR SOME HIGH SCHOOL....	9%
HIGH SCHOOL DIPLOMA (FINISHED GRADE 12).	38
SOME COLLEGE (INCLUDES JUNIOR/COMMUNITY COLLEGE -- NO BACHELOR'S DEGREE)..	30
GRADUATED COLLEGE...	12
GRADUATE SCHOOL (MASTER'S OR PH.D.).	7
TECHNICAL, VOCATIONAL OR TRADE SCHOOL.....	2
REFUSED/NA..........	2

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

Single.............	22%
Married............	59
Separated/divorced..	12
Widowed............	6
REFUSED/NA..........	2

54. Do you have any children of your own living at home with you who are... (READ LIST.)

	YES
a. Less than 13 years old......	32%
b. 13-18 years old...	11
c. More than 18 years old......	9

55. About how many dinners do you eat out every month? (FILL IN BLANKS.)

8.0 (MEAN) 5.0 (MEDIAN)

IF "NONE" ("00"), SKIP TO Q57

56. Of the dinners you eat out, about what percentage would you say you eat in hotel restaurants? (N=946)

28.3% (MEAN)
10.0% (MEDIAN)
00.0% (MODE)

57. Do you ever stay over night in local hotels or motels in Las Vegas?

YES	14%
NO	84
NOT SURE/DK	0
REFUSED/NA	1

58. What is your religious affiliation, if any? (IF RESPONSE IS UNCLEAR, READ LIST.)

PROTESTANT (METHODIST, PRESBYTERIAN, BAPTIST, LUTHERN, ETC.)	31%	
ROMAN CATHOLIC	26	ASK Q59
OTHER CHRISTIAN	10	
MORMON (LATTER DAY SAINTS) ...	8	
JEWISH	2	
OTHER NON-CHRISTIAN .	1	
AGNOSTIC/ ATHIEST	1	SKIP TO Q60
NONE	15	
OTHER	2	
NOT SURE/DK ...	0	
REFUSED/NA	5	

59. Do you consider yourself an Evangelical Christian, a Fundamentalist, or neither one?

EVANGELICAL.....	11%
FUNDAMENTALIST..	9
NEITHER.........	60 (N=664)
NOT SURE/DK.....	16
REFUSED/NA......	4

60. Most people think of themselves as belonging to a particular ethnic or racial group. What ethnic or racial group are you a member of? (ASK ONLY IF NECESSARY: Are you white, Black, Asian, Hispanic or Latino -- or of some other ethnic or racial background?)

WHITE...............	81%
BLACK...............	6
ASIAN...............	2
HISPANIC/LATINO.....	4
OTHER...............	2
NOT SURE/DK.........	0
REFUSED/NA..........	5

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

42.0 (MEAN)

(IF RESPONDENT REFUSES TO STATE AGE, ASK:)

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

18 to 21	4%
22 to 29	21
30 to 39	25
40 to 49	20
50 to 59	11
60 to 64	5
65 and older .	12
REFUSED/NA ...	3

62. Please tell me which one of the following categories includes your total family income before taxes last year. Include your own income and that of any member of your immediate family who is living with you. Was it... (READ LIST.)

Less than $10,000	6%
$10,000 to $19,999 ...	12
$20,000 to $29,999 ...	16
$30,000 to $39,999 ...	14
$40,000 to $49,999 ...	10
$50,000 to $59,999 ...	8
$60,000 to $69,999 ...	4
$70,000 to $79,999 ...	2
$80,000 to $99,999 ...	2
$100,000 or more	3
NOT SURE/DK	6
REFUSED/NA	18

* * * * * * * * * * * * * * *

My supervisor may be calling you to confirm that this interview took place. May I have your first name and telephone number so she can call and ask for you?

Name ______________________ Telephone # ______________________

That's all the questions I have. Thank you very much for participating in the survey.

ON FIRST PAGE: CALCULATE AND RECORD INTERVIEW LENGTH. RECORD GENDER.

I AFFIRM THAT THE ABOVE INFORMATION IS ACCURATELY RECORDED FROM THE RESPONDENT'S STATEMENTS.

Interviewer's Signature ______________________ Date ______________________

MARGINALS APPENDIX

Question 8

REASONS RESPONDENTS DO NOT GAMBLE

(Among Those Who Do Not Gamble)

	Primary reason (N=351)	Other reasons (N=351)
Don't like losing/wasting money	27%	4%
Not interested/it's boring/no fun	16	4
Can't afford it	11	1
Religious objections	8	2
Too risky/odds are against you	5	2
Don't like the gambling environment	5	3
It's a bad habit	4	3
Other	3	3
Refused/no answer	21	78

Question 21

REASONS RESPONDENTS DO NOT GO TO THE STRIP TO GAMBLE

(Among Those Who Do Not Gamble On The Strip)

	TOTAL (N=487)
Too crowded	25%
Too much traffic	14
It's out of the way/hard to get to	13
Too many/don't like tourists	7
Prefer another area (not downtown or Strip)	6
Work for casino/hotel	5
Can't afford it	5
Don't like the casinos/hotels	4
Not that interested in gambling	3
Prefer downtown	3
No time	1
Other	2
Not sure/no answer	12

Question 50

ZIP CODE

	TOTAL
Las Vegas proper (891xx)	75%
Henderson (89014, 89015)	8
All other (Blue Diamond -- 89004, Boulder City -- 89005, Bunkerville -- 89007, Indian Spring -- 89018, Logandale -- 89021, Mesquite -- 89024, Moapa -- 89025, Searchlight -- 89029, Laughlin -- 89046, North Las Vegas -- 89030, Overton -- 89040)	8
Not sure/no answer	8

Question 22

REASONS RESPONDENTS DO NOT GO DOWNTOWN TO GAMBLE

(Among Those Who Do
Not Gamble Downtown)

	TOTAL (N=529)
It's out of the way/hard to get to	17%
Too crowded	14
Don't like downtown/it's dirty/uncomfortable	11
Too much traffic	5
Prefer the Strip	5
Not a safe neighborhood	5
No parking	5
Prefer another area (not downtown or the Strip)	5
Too many/don't like tourists	3
Not that interested in gambling	3
Can't afford it/money considerations	3
No time	1
Other	3
Not sure/no answer	21

Question 24

REASONS RESPONDENTS DO NOT GAMBLE MORE OFTEN

(Among Those Who Would Like To Gamble More Often)

	Primary reason (N=175)	Other reasons (N=175)
Can't afford it	85%	5%
Don't like gambling that much	5	2
No time	3	3
No interest (no further information)	1	5
The crowds	1	1
Other	3	2
Refused/no answer	2	82

The New Tim

City Beat

Fremont Street's gauntlets of guilt

With construction of the $63-million Fremont Street Experience, foot traffic has been squeezed into two thin paths along the four blocks known as Glitter Gulch.

These paths should be called "The Gauntlets of Guilt."

Panhandlers and smut peddlers gleefully accost the trapped, knowing that pedestrians can't escape because of the construction.

The beggars stare you down, doing their best to guilt you into giving up some spare change. The smut peddlers cruise through the crowds like sharks, doling out business cards advertising topless bars and adult entertainment services.

One *New Times* staffer, who walked down Fremont Street on Saturday night, was asked for money four times and collected five PG-13 rated business cards.

The staffer couldn't dodge, duck or run from the hander-outers — there is simply no room to maneuver.

Tourists emerge from the gauntlet looking dazed and angry.

Cops do sometimes move the panhandlers along, but there's little they can do. Loitering laws are almost unenforceable unless the person decides to lie down on the sidewalk and take a nap. A person standing up and walking is not really loitering, says a Metro bike cop who patrols the downtown area.

The panhandlers and smut peddlers might not be loitering, but they sure as hell are annoying. This is not the Fremont Street Experience city leaders planned for tourists.

It's Christmas. Aren't we allowed to have a good time?

'Tis the season for the local media to don the Puritanical garb and tell us all how to be safe during the holidays. The bits about "don't drink and drive" are fine, but the TV newsies have started to go overboard. Now, we're getting advice like:

— Eat a healthy low-cal meal before you go to a Christmas party where you'll be tempted to eat unhealthy stuff. (Channel 8)

— Don't take your kids Christmas shopping with you. Leave them at home so they won't be kidnapped by pedophiles. (Channel 3)

—Gift buying can be expensive. Be sure not to put too much on credit cards because credit cards have high-interest rates. (This blinding flash of the obvious is from CNN.)

— When entering a department store, wear safety goggles so the perfume snipers don't spray you in the eyes AND BLIND YOU FOR LIFE! (We made that one up, but the TV newsroomies probably already have it on their "future ideas" bulletin board.)

Enough already. Here are the New Times recommendations for having a happy holiday: Eat like a pig. Drink like a fish. Take the kids everywhere you go because kids love to go places with their parents. Max out the credit cards and give big wonderful gifts to everybody you know.

Relax. Have a good time. You're adults and we're reasonably sure that 93.7 percent of you know how to enjoy yourselves without doing any serious damage.

Don't drink the anti-freeze

Recently, a tipster told the *New Times* that homeless drunks will sometimes drink anti-freeze because the treatment for anti-freeze poisoning is intravenous feeding of alcohol. In other words, doctors will get you very, very drunk.

After calling three local emergency rooms (Valley, Sunrise and UMC), we found the truth. Here it is:

People who show up in emergency rooms after drinking anti-freeze are either children who didn't know better or adults trying to commit suicide as painfully as possible.

When the liver processes the anti-freeze, it turns it into little crystals that slice up the kidneys, says Dr. Gary Branum, director of toxicology at Associated Pathol Laboratories. Alcohol dissolves the c enough so they can be passed.

Even if the alcohol treatment is succ there will often be permanent kidney da

"It's a slow, painful way to die Branum.

That's why people don't generally anti-freeze to get the treatment, desp rumors.

As one emergency room tech p out: "A gallon of anti-freeze is like $9 would a drunk buy $9 worth of ant when he could buy $9 worth of cheap l

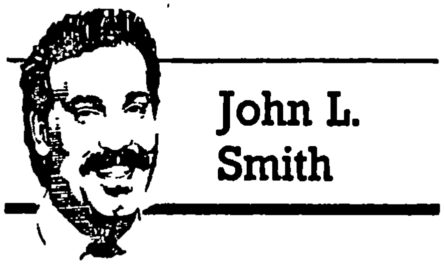
Craig Brown, the lab mana Associated Pathologists Laboratories, hasn't seen any cases of alcoholics d anti-freeze here, but when he wo Tacoma, Wash., there were a few fo would drink anti-freeze to get the cu

"We had several regulars who dic says. "One guy in particular would little bit of anti-freeze and then pre drank enough to kill him so he could alcohol IV. The thing was, he was d died from kidney failure and liver da

He's baaaaaack

The infamous talk radio guy w said he'd like to "goat it" with Mayor J and once told a caller to come dow station so he could "bend her o

Seattle's firm approach to panhandling begs for emulation



John L. Smith

It was one of those delicious spring days in soggy Seattle.

The clouds pulled back like a theater curtain, and a Disney blue splashed across the afternoon sky. Such cartoon-beautiful moments are a big reason the city has been overrun by Californians and Volvo drivers.

We darted onto the sidewalk patio ahead of the other burrito-eaters at the little Mexican cafe not far from the Space Needle, sipped our cervezas and sopped up the sunshine while awaiting lunch. The day was devoted to spicy food, cold beer and belly laughs.

When the inebriated behemoth appeared at the table like a maniacal waiter from "Barfly," I mentally counted the coins in my pocket. Panhandlers are as common as rain on the sidewalks of downtown Seattle, and most are harmless enough. Some are even entertaining. Feeding the elephant a peanut seemed like a simple way to keep the peace.

But this guy wasn't in the mood for standup comedy. He had glassy eyes, a menacing glare, and a jack-o'-lantern grin. He leaned close to the table and demanded money and tortilla chips.

It's a long story, but he managed to grab a fistful of chips before moving on. It was then I decided Seattle, like many other cities, had a real problem with its back-alley boozers and big-league beggars.

Seattle, the birth place of grunge rock, where it's hard to tell the heavy metal stars from the street people, is changing its tune toward panhandlers. The progressive, latte-powered metropolis perennially voted the most livable city in America finally has grown tired of playing ringmaster to the sidewalk circus.

Since 1987, it has been a crime to aggressively panhandle in Seattle. Begging is one thing; badgering pedestrians is another. Last fall, the law was revised and reinforced. Although the punishment, a citation, makes little sense — if a guy had enough money to pay a ticket he probably wouldn't be bumming small change for a quart of Thunderbird — the effort is thought-provoking.

An ordinance gaining national attention is Seattle's no-squatting rule. Between 7 a.m. and 9 p.m., it is against the law to loiter, sit or nap on the sidewalk in select downtown areas. Although lying on a summer sidewalk in Las Vegas might be good for a few second-degree burns, the point is clear: Without shredding the Constitution, the law gives police enough power to keep urban campers and belligerent street urchins from taking over the sidewalk and intimidating citizens.

A federal judge recently ruled both laws constitutional.

Although no ordinance ever cured a societal ill, the rules provide a potential model for developers of downtown Las Vegas, who are faced with a growing number of bums and winos as they attempt to improve their businesses and construct the $63 million Fremont Street Experience.

Although Las Vegas political philosophy tends to run toward the Orwellian, Seattle is attempting to address the question without turning the sidewalk into a concrete ribbon of totalitarianism.

By most standards, Seattle has done more than its share to assist indigent citizens. Last year, the city sank $6.6 million into homeless services. From soup lines, women's shelters, transitional housing, alcohol rehabilitation: Seattle's social workers are active on all fronts. But there is a difference between helping those who want to help themselves and providing an alibi for the professional nuisance.

"We have been very open to writing checks for social service, but we are no longer able to put up with this type of behavior on our streets," Lori Mayfield, assistant to City Attorney Mark Sidran, says. "I think that people in Seattle, as in many other cities, are seeing behavior that is not so typical of homeless people but typical of lawless people. We do have services for homeless people. These are not your typical homeless people."

The panhandlers are younger, more aggressive, and far more prone to intimidation, Mayfield says. The tenor of the street has changed, but the city is changing, too. Without using it as an excuse to assume the role of a bullying Big Brother, Las Vegas leaders can benefit from Seattle's example.

Cities may differ, but their maladies do not.

John L. Smith's column appears Wednesday, Thursday, Friday and Sunday.

Las Vegas Review - Journal

4/22/94

Soaring area crime hurts tourism in downtown casinos

My friends and I were talking about the money to be spent on the Fremont Street Experience, and we all agreed it is a great waste.

The Fremont Street Experience will not bring tourists to the downtown area, because the crime rate on Fremont Street and surrounding areas is growing rapidly.

For example: We all are bingo players at the Western Hotel & Casino on 9th Street and Fremont, and have been coming downtown during the winter for more than 20 years.

We have noticed violence and crime increasing each year. What prompted me to write this letter is what happened to one of our bingo pals last week.

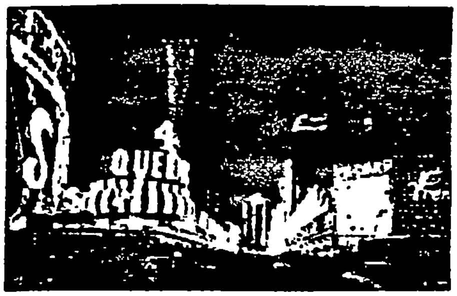
This nice, sweet, retired man was mugged and thrown down on the ground, just one block away from our bingo parlor. After this incident, he and his wife said, "We will never, never come back to Las Vegas."

I do not blame them at all because we share their feelings. Many of our senior friends are afraid to walk from the parking lot into the casino. My friends and I are fed up. We want more police protection from the thugs on Fremont Street, not a canopy to look at. Clean up the crime and the tourists will come.

Grace Otterson

Sunday
Jan. 30, 1994

September, 1993



The Fremont Experience

John Busam

Downtown, Las Vegas, "Glitter Gulch", is the foundation upon which this gaming and entertainment mecca was built. Since 1905, when the town was incorporated, Downtown has played an integral and indispensable role in the emergence and evolution of the city into one of the world's most prestigious and popular resort destinations.

Many of the city's essential services and now-traditional amenities originated along downtown's Fremont Street. This famous thoroughfare was the first street to be paved (1925), the first to boast a traffic light (1927), and the site of the first high rise building-the Fremont Hotel (1956). Fremont Street's Apache Hotel installed the city's first elevator, and the Horseshoe was the first casino to install carpeting. The Golden Nugget was the first building in Las Vegas designed from the ground up to be a casino.

The concentration and confederation of casinos in the historic heart of Las Vegas contrast sharply with those imposing neon palaces which flank the celebrated "Strip"; these newer properties separated by vast expanses of land. The casino-hotels which line downtown streets provide visitors and patrons with a unique character and ambience, carefully created and indelibly etched into the soul of the city by the likes of Benny Binion, Sam Boyd, and Jackie Gaughan.

Through the decades, Downtown casinos and businesses prospered. Both catered to a loyal army of Las Vegas residents

and a sizable contingent of faithful patrons from around the country.

In 1990, however, the Downtown area began to suffer an economic decline, and casino operators and City Fathers realized that "All that Glitters is Not Gold". Casino-hotels began to see a consp ous, and alarming, slump in gaming re enues, occupancy rates, and profit margins. A number of circumstances were attributed to the downturn: the opening of two mega-resorts on the Strip (it is estimated that by 1994, six mega-resorts on the Strip will generate approximately 50% of all gaming revenues in Las Vegas), proliferation of gaming outside the state, and the success of border and neighborhood casinos.

The downtown area was also suffering from a deteriorating infrastructure and a growing perception that the area was unsafe, unclean, crowded, and unsophisticated.

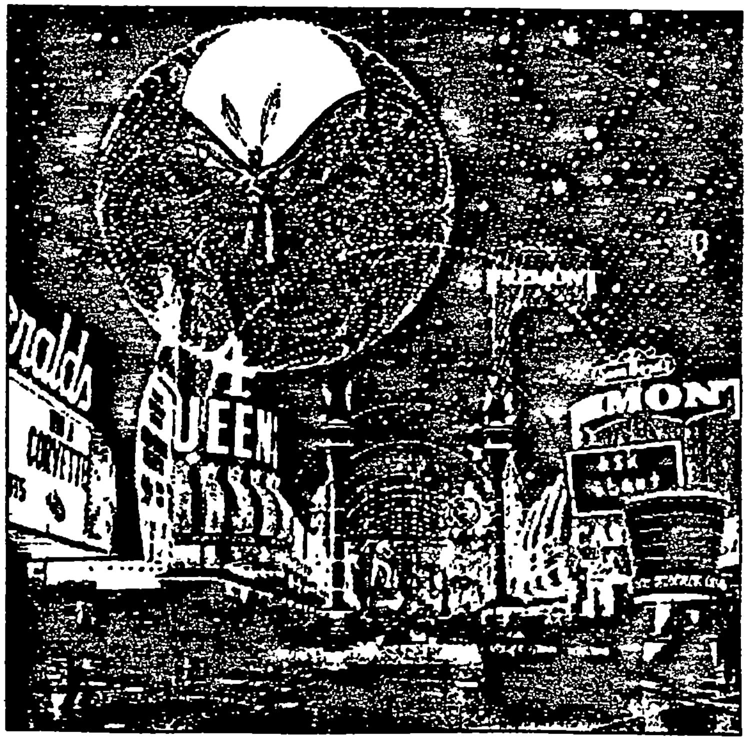
Downtown business leaders, together with City Officials, had to take the future into their own hands. Casino operators had to improve their "product" so that the downtown area would regain its vitality, profitability, and competitive position in the changing, and rapidly-expanding gaming market.

Mrs. Jeanne Hood, Chairwoman of the Downtown Progress Association, a nonprofit organization founded in 1976, reflected on the need for such a concerted effort: "Redevelopment and revitalization of Downtown Las Vegas is essential to the longer-term economic health of the area and, to a considerable extent, to the continued prosperity of all of southern Nevada. The Downtown area is an essential element both historically and functionally in the resort corridor and in the destination known around the world as Las

A, and the Las Vegas Conv sitors Authority agreed to coalesce and develop an area of downtown into a themed and unified gaming and entertainment center which could effectively compete with all major gaming centers in the world. They retained world-acclaimed urbanist, Jon Jerde to create a unique attraction, a one-of-a-kind entertainment phenomenon which would serve as the catalyst for the resurgence of Downtown, Las Vegas. The project, it was decided by consensus opinion, would be built around Downtown's most famous venue-Fremont Street. Mr. Jerde saw the historical street as central to the project. "There is nothing quite like Fremont Street," said the urban architect. "I view Fremont Street as two walls of exhilarating lights (the casinos) and two walls of darkness (the sky and street)." We have only "to wrap the entire experience in light, sound and motion".

A spokesman for the Jerde Partnership explained, "The combination of the Fremont gaming venues, when unified within a central idea, can become a Premier

continued on page 49



Editorial Page

Commission to review report on homeless

By David Clayton
LAS VEGAS SUN

A report detailing a proposed $9 million center for the homeless will be reviewed Tuesday by the Clark County Commission.

The center would be financed by the city of Las Vegas and Clark County and provide 1,000 beds, as well as programs designed to return homeless people to lives of self-sufficiency.

A report on the center – known as the MASH center, or Mobilized Assistance and Shelter for the Homeless – is to be delivered by Arnold Stalk, whose California firm, Stalk and Stalk, studied the Las Vegas homeless problem. The $48,860 cost of the study was shared by the city and county.

The city already has approved $2.5 million for the project, and the county will be asked to commit a similar sum. The balance of the funding, if the center is approved, would come from loans, private donations and perhaps federal grants.

The study has concluded that Las Vegas' growing homeless problem has rendered the existing six emergency shelters inadequate.

"During a recent nonscientific survey of 200 downtown homeless men and women, an overwhelming majority stated that downtown food and drink is cheap and the panhandling very good," the study reports. "This is causing a negative impact on downtown tourism and business."

The study recommends "a coordinated and comprehensive effort" combining social work, jobs training, child care, schooling, medical care, alcohol and drug recovery programs and mental health services.

The MASH center would be brand new, not a renovation. Stalk and Stalk recommends demolishing the 185-bed St. Vincent Shelter and using that site, plus adjacent land, for a "state of the art" facility.

8/2/93

5/18/93

Senate OKs downtown room tax bill

Donrey Capital Bureau

CARSON CITY — The state Senate unanimously approved a bill Monday that would allow downtown Las Vegas hotels to add a 2 percent room tax to guests' bills to finance a canopy and light show project over Fremont Street.

Since Assembly Bill 433 already has been approved by the Assembly, it now goes to Gov. Bob Miller.

The room tax throughout Clark County is currently 8 percent. The bill allows hotels along four blocks of Fremont Street to increase the rate to 10 percent. Other downtown hotels, adjacent to the improvement area, would raise their room tax to 9 percent.

With Miller's assent, a business improvement district would be created to finance the $63 million Fremont Street Experience, a four-block-long canopy and light show.

Construction of the 1,540-foot canopy is set to begin this summer, with a grand opening scheduled for the fall of 1994.

A 100-foot-high canopy will be built over Fremont Street from just east of Main Street to Fourth Street, connecting hotel facades and businesses. At night, the structure will project a a light show.

Sen. Bob Coffin, D-Las Vegas, hailed the bill as the first non-gaming attraction to enhance downtown business since 1968. He said Fremont Street, once the primary Las Vegas shopping district, has declined into an area dominated by "T-shirt" shops and "quick hustles."

Hotels in the downtown area have agreed to contribute $28.7 million in the form of cash and the increased room tax. The city of Las Vegas will contribute $27.6 million for construction of a parking garage and street improvements. The Las Vegas Convention and Visitors Authority will put $6.7 million into the project.

Las Vegas S
3/2/93

Fremont Street plan just great for downtown

A memo was circulated asking all the folks in my office to review the specs of the "Fremont Street Experience" and the downtown revitalization.

I think the idea all the way around is fantastic! And I find it hard to believe that anyone would stand in the way of such progress.

The downtown area is becoming quite the eyesore, and I personally find it scary going down there day or night.

To think of the street parties and festivals is wonderful. Are there any bad aspects about this project? If there are, I can't see them.

John E. Hessling

Las Vegas Sun.
February 17/99

Bring back the old image of downtown LV

Bad public policy begets ever-increasing bad public policy – with taxpayers, investors, businessmen and workers taking all the hits. The Fremont Experience is the direct result of past decisions to fight against the market forces which created Las Vegas.

Some time ago, do-gooder city fathers decided to "save" us from the Sin City image, and the results have been disastrous: declining business, falling tax revenues, increased taxes, downtown decay, violent crime, job loss, homelessness, bored tourists and, of course, denials by those responsible.

Now the same apparatchiks want to cover up their previous violations of the market by spending $50 million of someone else's money – so they can continue to ignore the demands of the marketplace.

While the squeaky-clean Dutch are creating a billion-dollar industry based on sex alone, our local commissars pull dirty tricks every day to pretend prostitution doesn't exist in Las Vegas and to drive topless clubs out of business.

So our taxpayers, investors, businessmen and workers not only lose hundreds of millions of dollars in income, but are about to have $50 million stolen from their empty wallets – just to satisfy the "morality" of a powerful minority.

Let's encourage downtown Las Vegas to be what it always has been and is today.

Ed Uehling

Jy 16, 1993
Las Vegas Sun

Fremont [illegible] will work with other planning

GUEST OPINION

■ **THE FOLLOWING** article was written by Robert A. Fielden, a local architect.

JON JERDE'S $63 million revitalization project for Fremont Street is necessary if downtown hotel and casino enterprises wish to remain in business.

The project will also assist other downtown businesses and will provide a significant economic boost to the Southern Nevada construction industry which has been heavily impacted by the recession.

However, Councilman Frank Hawkins is absolutely correct when he states that the Fremont Street Experience should only be one component of an integrated plan for revitalization of downtown.

Fremont redevelopment should occur concurrently with other downtown revitalization projects that are of equal importance and benefit to Las Vegas

Each year, professional activities in my planning and architecture practice take me to major cities across the United States, Canada, and Mexico I study what other cities are doing to attract tourism and new business to their communities.

I also study how downtown areas in these cities are changing to recreate an urban tax base to help support necessary government services for the community at large.

Short trips to Phoenix, San Diego and Monterey, Calif., will show what nearby cities, large and small, have done to rebuild their downtown areas to capture a larger share of business and tourism.

I was truly surprised during a recent visit to New Orleans A magnitude of improvements have accrued in the French Quarter, along Canal Street, and with new developments along the riverfront. The extent of improvements can be measured by the public's financial commitment to regain the city's reputation as a world-class tourist attraction.

A lesson to be learned by the success of these communities is that redevelopment downtown must be addressed holistically.

Cleaning up the French Quarter in New Orleans (like constructing the Fremont Street Experience) was important, but it was only a single component of the entire issue.

By redeveloping the riverfront and making improvements along Canal Street, the city was able to rid visitors' perception of urban blight and high crime. It strengthened the lagging tourist market and increased the popularity of Canal Street. New businesses – including hotels – developed in the area This provided much needed new employment and strengthened the city's tax base.

New Orleans redevelopment planning created a win-win situation for the entire community. Councilman Hawkins' plan to create jobs through downtown projects can be equally as successful here.

A study was conducted by faculty and students of planning, architecture, and landscape architecture at UNLV last spring. It was prepared for Advanced Planning at the city of Las Vegas and outlined a series of long-range objectives for downtown redevelopment in areas other than Fremont Street. This study also identified a number of short-term projects that need to be brought "on line" to improve downtown.

The list includes such basic items as ensuring that there are safe areas for people to walk and that alleys are clean and well lighted at night for public safety. Other projects provide for awnings, shade trees and concessionaires along the streets.

Uniform street graphics, outdoor seating, a public transportation loop serving downtown businesses and the government centers are listed in the study.

A series of landscaped pedestrian plazas along Carson Boulevard and more evening and night attractions for locals, tourists and their children are also proposed.

The university study identified a number of downtown mid-block alley improvements that can be easily and economically developed. These house small pocket parks, outdoor cafes, boutiques and specialty shops. Utilization of these areas will expand business opportunities in off-Fremont locations and remove the perception of blight and crime that currently exists.

Most of the recommendations included in the UNLV study have been utilized in other successful community redevelopment plans. They have been incorporated in New Orleans and are apparent in the projects in Phoenix, San Diego and Monterey.

If the citizens of Las Vegas want downtown to flourish, remain safe and pay a fair share of the tax burden, we have a responsibility to assist with redevelopment.

Projects such as public parking structures, transportation loops and infrastructure improvements that serve the public are the public's obligation to the community and should be publicly funded.

Likewise, improvements which benefit the hotels and casinos along the Fremont corridor should be funded, and then repaid by those who will directly profit from the improvements. Long-range, low-interest bonding programs can be endorsed by the public and initiated by the city to assist with this endeavor.

Collectively and concurrently, the work should move ahead Downtown needs the improvements, local citizens need the additional employment, local construction needs the boost and Las Vegas needs the expanded tax base.

A win-win situation for all of Las Vegas can be created through downtown redevelopment Stand by your guns, Councilman Hawkins.

Vegas Unveils New Tourist Lure

By Sergio Lalli

H&MM Las Vegas Bureau

LAS VEGAS—In an effort to boost downtown tourism, the hotel industry and the city fathers here have decided to erect a lighted canopy over Fremont Street to bolster awareness of the area.

The $52 million extravaganza is known as the Fremont Street Experience. Its aim is to provide a unifying motif for downtown as a whole and create a must-see attraction that will bring more tourists to the score of hotel-casinos along the five-block stretch of Fremont Street known as Glitter Gulch.

The Las Vegas City Council recently approved an $897,000 contract with Jerde Partnership of Las Vegas for an

xperience

continued on page 45

Hotel & Motel Marketing
September 7, 1992

Las Vega

continued from page 5

engineering study of the proposed canopy of lights. The Downtown Progress Assn., which represents hotels in the area, also has given its blessing to the idea.

There are two main elements of the project:

- An awning composed of slender, rib-like arches will cover Fremont Street from one side to the other. The canopy will be 100 feet high at its apex. A mesh-like material will stretch over the entire canopy, allowing one to see through it and enjoy the storied neon lights of downtown Vegas hotels. But the roof also will be substantial enough to provide shade during the day. A water-mist system inside the canopy will reduce daytime temperatures during the summer by as much as 15 degrees.
- On a cable suspended above, a series of lighted parade floats imagine an electronic Macy's Thanksgiving Day parade—will waft by. At the same time, the mesh-like material overhead will come alive with laser projections and music will fill the air.

"This will breathe air back into the downtown core," said Steve Thompson, chairman of the Downtown Progress Assn. "We feel we've found a winner. The Fremont Street Experience will include sound, music and motion, and will be a significant draw for Las Vegans and tourists alike."

The importance of the project for downtown hotels was underscored by Barry Sherer, general manager of the Golden Nugget hotel. "If this fails, downtown will bleed," he said.

Losing Ground To The Strip

For years, downtown hotels have been losing ground to the Las Vegas Strip's more modern megaresorts, such as the Mirage and the Excalibur. Furthermore, downtown Vegas suffers from an image of not being as safe or as clean as the more glamorous Strip.

His sentiments were echoed by councilman Scott Higginson, who, along with other council members, pledged to commit urban-redevelopment funds to reverse the trend of downtown atrophy

"I've always said we need an attraction," Higginson said. "I call it the 'Christmas tree.' Until now, we've been building ornaments."

The 1,600-foot-long tunnel of lights will connect a driveway of hotels that have a total of 8,000 rooms. These properties include the Golden Nugget, the Horseshoe, the Union Plaza, the Las Vegas Club, the Fremont, Fitzgeralds and the Four Queens. Officials say the intent of the Fremont Street Experience is to make the individual hotels seem like a single entity.

"Fremont Street in itself is an extraordinary experience," said Jon Jerde, who was commissioned to come up with an idea to revitalize downtown. "We want to consolidate what's already there."

Jerde's idea, however, is not lacking in critics.

"The wonderful people who

Review Journal

No kids

8/12/92

To the editor:

The "Fremont Street Experience" will be an expensive flop. Tourists on downtown streets don't look up; they look at the various messes and panhandlers.

Downtown shouldn't try to compete with the Strip, because the playing field has changed. Nothing downtown might do could stand against the sparkling Strip playlands, not to mention the ones now under construction. They're wonderful. I love 'em. But they have a flaw: kids and their families.

Let's remember the old Las Vegas — glitzy shows, gaming, sophisticated wickedness unavailable anywhere else. Most visitors dressed up.

Downtown could remake itself as the "adult playground." No excessively loud music or kid's stars. Bring back the lounge shows. Don't allow children in the casinos. Clean the whole place up, and ACLU be damned, get rid of the solicitors.

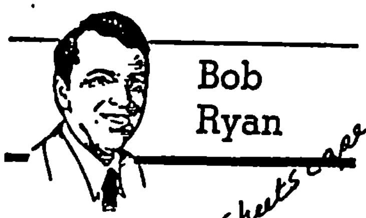
There is a crowd of people who think of a Las Vegas vacation as inappropriate for the kids. The trend on the Strip is not heading in their direction, even though they have the bucks and like table games better than slots. If downtown gets into their mode, a Fremont Street Experience would be a great addition, and the city wouldn't have to subsidize it. Lose the kids as a future market? Marketed as an alluring, somewhat forbidden enclave, the young crowd will grow up anticipating the day when they are old enough for the big stuff.

Know what else is needed to class up the place? Main Street Station.

HARRIS LOWENHAUPT
Boulder City

Commentary

Giant awning won't change what folks see on Fremont Street



Bob
Ryan

Streetscape

The Fremont Street Experience! It's a bold and expensive plan that downtown hotels and the Las Vegas City Council are wildly touting. In light of the three new casino/theme parks opening next year on the Strip, this venture is designed to make downtown competitive.

The project consists of a mesh-like awning which, at its apex, will rise 100 feet above the pavement. The material will provide shade and allow nighttime projections to be displayed. The tent is expected to stretch along Fremont from Main to Fourth Street. An above-ground guide rail will also be installed permitting movable floats to glide back and forth along the length of the awning.

Unlike Main Street Station, which benefited a single entrepreneur, this is the type of redevelopment city fathers should foster. Serious thought, however, must be given to re-evaluating this particular undertaking. While technically feasible, the canopy won't achieve its goal.

The downtown area doesn't need an umbrella. It needs a clean-up at eye level. Visitors don't walk around with their faces tilted skyward, they look straight ahead or off to the side. If you do that on Fremont Street, what you see is a mess.

Compared with the new and up-to-date Strip hotels, the downtown buildings are old and many of the casinos haven't been refurbished in years. Besides the hotels, the Fremont Street thoroughfare houses numerous grimy souvenir shops and little else. No one could confuse these stores with a modern mall. Fremont Street also contains the "Girls of Glitter Gulch" strip joint. With or without an awning, these attractions are unlikely to lure families to the heart of the city.

There are also the street solicitations. One night last week, my wife, Vicki, and I strolled the Fremont Street promenade. At every corner, someone hit us up for a charitable contribution. Were the causes legit? Who knows. But no one, especially vacationing tourists, wants to be constantly harassed. That's why these prectices were banned at McCarran Airport.

While walking along, I felt as though we were in a miniature Times Square. The ambience was similar: dirty streets, deterioreting shops, unseemly sex joints and a less than desirable clientele. All that was missing were porno movie theatres, and they're only a block away.

To simply build an awning over what currently exists is equivalent to giving a parasol to the ugly duckling.

If the street level sights were alluring, the tent would certainly enhance them, but to merely erect a spectacular overhang and believe it will revitalize downtown is naive. Steve Wynn had a better idea when he suggested that Venice-like canals, palm trees and other vegetation be installed downtown.

But even if the city council proceeds with the so-called Fremont Street Experience, it must address several concerns:

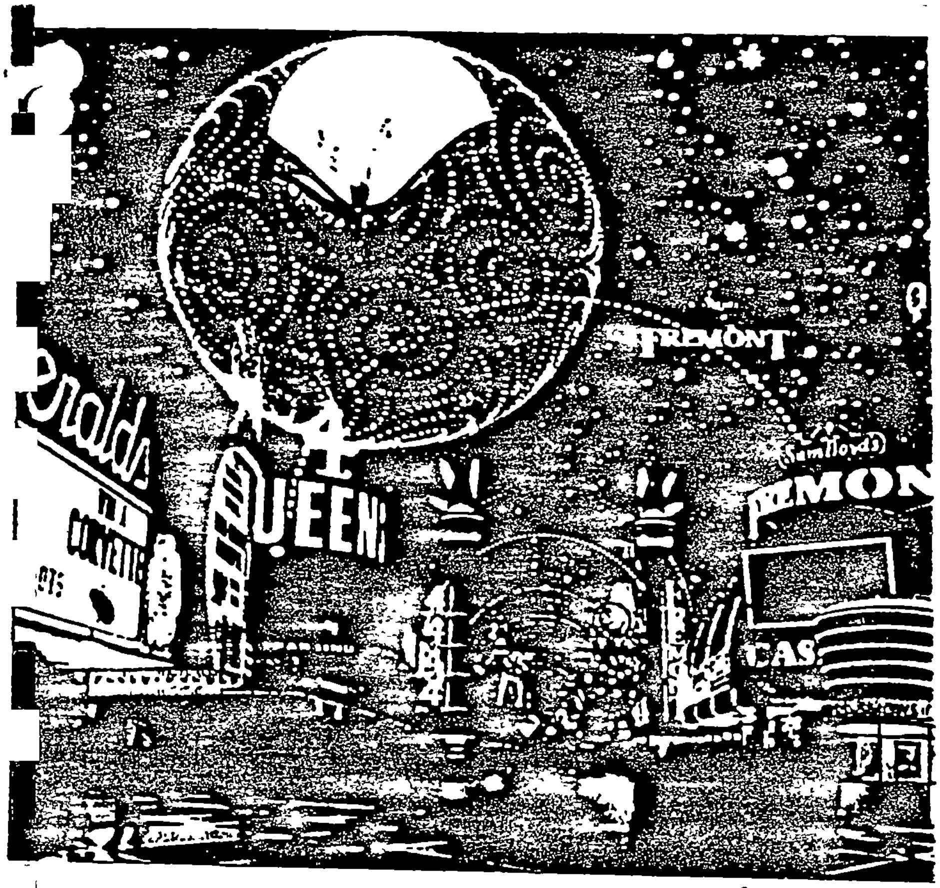
Including a $22 million parking garage, the city talks about spending approximately $29 million in redevelopment funds. Since the entire project will cost about $74 million, it means that the city foots 39 percent of the bill. Local casinos would shell out the rest. In most previous redevelopment adventures, the city put up 12.5 percent of the capital. But in this case, that retio can only be achieved by eliminating the parking garage.

Next, who owns the awning? That has yet to be determined. If it's damaged, who is responsible for fixing it?

Finally, a reasonable standard must be established for measuring the success of the enterprise. Mayor Jan Laverty Jones says that the project vindicates itself if it draws more folks to the area. That's too vague. There is no accurate way of gauging how many people go downtown. Success must be calculated in terms of improved gaming revenue. The mayor and council have to stipulate what increase in these receipts would justify such a significant expenditure of public funds.

As everyone knows, prior city redevelopment efforts have been riddled by failures. If the Fremont Street Experience proceeds — although I hope it won't — let's say a prayer that it works. To get it on, the city will have to use virtually all of its remaining redevelopment money. And that's a big gamble.

Bob Ryan's column appears Sunday, Monday and Tuesday.



Special to the Review-Journ

…l's rendering shows the $52 million Fremont …xperience as proposed by urban designer Jon Jerde. The plan calls for a giant awning to cover Fremo… and tie all the casinos together into one big resort

Awning proposed over Fremont Stree

The City Council hires a firm to design a plan to upgrade downtown areas … compete with the Strip.

…arl Scarbrough
…w-Journal

Idea man Jon Jerde on Tuesday presented the Las Vegas City Council with his $52 million plan for making … ront Street a must-see attraction … sing a giant awning to make the … ntown gaming district a single megaresort

The council voted 4-1 to hire Jerde's urban design firm for $900,000 to … r the feasibility of making the … mont Street casinos a single entity … 17,000 slot machines, 61 gaming … s, 41 restaurants, nine showrooms and 8,000 hotel rooms Fremont Street would serve as a grand foyer almost 1,600 feet long

… e vote authorized city staff to pre… a contract with Jerde The con… will come back to the City Coun… …r final approval

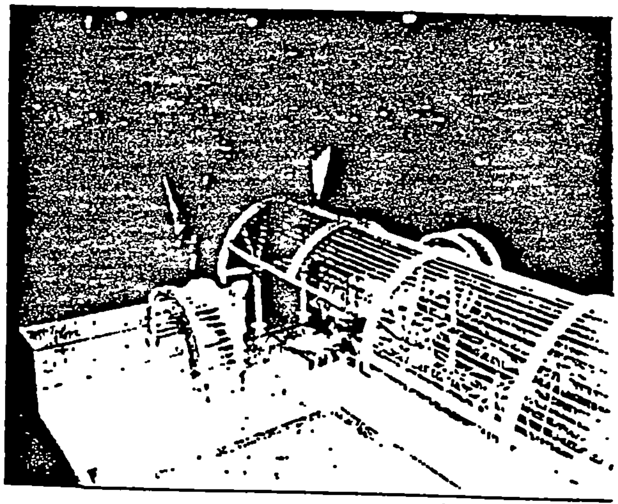
"Fremont Street in itself is an extraordinary experience," Jerde told … ouncil "We want to consolidate … deas you already have"

Ma… Jerde was paid $75,000 to … op a theme attraction for downtown Las Vegas He calls his plan the Fremont Street Experience

… arched awning 100 feet tall at … ex, would stretch along Fremont … Main Street to Fourth Street … sign also allow for a one block expansion from Fourth to Las Vegas Boulevard, but that's not included in the $52 million estimate

The awning would be made from a mesh-like material that would provide shade and serve as a screen for nighttime projections A water mist system would keep the area cool in the summer Heaters have been discussed for

Please see DOWNTOWN/2B



Jeff Scheid Review-Journa

Robert Maxey an MGM Grand Hotel & Theme Park executive, on Tuesday examines a model of the Fremont Street Experience, as Bill Briare, right, of the Downtown Progress Association looks on

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Downtown

From 1B

use in winter months

: Supported by cables similar to a ski lift, giant parade floats would be carried overhead Jerde said this lighted attraction would be similar to the Disneyland light parade

"Imagine that flying through the sky," Jerde said. "It would stand against any of the single attractions on the Strip."

: The light imagery would be incorporated in sidewalks and streets with sequenced, pulsing beams that would resemble a landing strip, Jerde said.

The Fremont Street Experience drew much praise from the City Council, acting as the Las Vegas Downtown Redevelopment Agency.

"If I were a teacher, I would have to give them (Jerde's firm) an A on this project," Councilman Arnie Adamsen said.

But Councilman Frank Hawkins voted against giving Jerde $900,000 for the feasibility study needed to get the proposed redevelopment project under construction.

Hawkins said he was uncomfortable with the cost. "I am in support of the project, but this is a big step for us and I have some questions I want answered," he said

Alarmed by declining revenues and a trend that showed many tourists perceive downtown as grimy and unsafe, downtown casino owners, through the Downtown Progress Association, began searching for a way to improve Fremont Street.

Representatives of all 11 casinos in the progress association attended Tuesday's meeting and unanimously supported Jerde's plan

Steve Thompson, chairman of the progress association, said at a news conference before the council meeting the Jerde plan is what is needed to "breathe life back into the downtown core"

"The (progress association) feels we have found a winner," Thompson said. "The Fremont Street Experience will include sound, music and motion, and will be a significant draw for Las Vegans and tourists alike."

Thompson said association and city officials have roughly 15 months to get something done downtown. September 1993 is when several megaresorts under construction on the Strip should be near completion

"Our share of the (gaming revenue) pie is going to dwindle at the end of 1993 if we don't do anything," Thompson said

It's unclear who will foot the $52 million bill to redevelop the area

If the city used all of its remaining redevelopment funds, it could contribute maybe as much as $36 million to the construction, said Richard Welch, the city's economic and urban development chief. He said it is possible the city could find other funds to widen the sidewalks along Fremont Street, making the road only two lanes wide, as prescribed in the Jerde plan.

But the Fremont Street Experience is only one component in downtown redevelopment, and the city is committed to other projects like additional parking and making Fourth Street a major corridor linking downtown with the Strip, said Deputy City Manager Tom McPherson.

The Fremont Street project "is obviously the major component of the whole plan," McPherson said.

Most of the other components are still being studied McPherson said everything, including Jerde's feasibility study, should be pulled together by September

"We're going to be ready to start construction, .. then we will figure out financing," he said.

Councilman Bob Nolen said he viewed the downtown efforts as a private-public partnership that would require financial contributions from the downtown casinos.

"We're going to be looking to you folks for your share of the partnership," Nolen told downtown gamers

City officials said they aren't sure if this is the one project on which the city wants to spend the balance of its redevelopment funds.

"It's too premature to say," Mayor Jan Laverty Jones said. While she said she wholeheartedly supports the plan, she also is committed to using some redevelopment money to fund affordable housing

Councilman Scott Higginson said the amount of redevelopment funds used for the project can't be determined until the plan is finalized But he said he supports the idea because it does more than any previous redevelopment project.

"I've always said we need an attraction (downtown)," Higginson said "I call it the Christmas tree Until now, we've been building ornaments."

Also included in the Jerde report is a $22 million parking structure proposed for the First Western Savings Association property at Fremont and Las Vegas Boulevard

The city has agreed to buy the land from the bank for $3 million The $22 million required to develop the parcel is not included in the cost of the Fremont Street Experience.

WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:

LV

ARE YOU A RESIDENT OF LAS VEGAS?: YES

IF VISITING, WHERE ARE YOU STAYING?:

HOW MANY TIMES PER YEAR DO YOU VISIT?:

COMMENTS: POSITIVE

NEGATIVE GET REID OF BEGGERS

THANK YOU FOR VISITING

FREMONT STREET EXPERIENCE
302 East Carson Street
Suite 808
Las Vegas, Nevada 89101
702 382-6397 FAX 702 386-8463

WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME: [illegible]

MAILING ADDRESS: [illegible]

Hazelhurst Wisconsin

ARE YOU A RESIDENT OF LAS VEGAS?: no

IF VISITING, WHERE ARE YOU STAYING?: Fitzgerald

HOW MANY TIMES PER YEAR DO YOU VISIT?: 1

COMMENTS: POSITIVE Wonderful.

Should have done it years ago.

NEGATIVE Junk on Streets, missing purse, begging etc.

THANK YOU FOR VISITING

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Suite 888
Las Vegas, Nevada 89101
702 382-6397 FAX 702 386-8463

FREMONT STREET Experience

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:

Las Vegas, NV.

ARE YOU A RESIDENT OF LAS VEGAS?: Yes

IF VISITING, WHERE ARE YOU STAYING?:

HOW MANY TIMES PER YEAR DO YOU VISIT?:

COMMENTS: POSITIVE

NEGATIVE ~~Bu~~ Bums beggars panhandlers.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
702 382-6397 FAX 702 386-8463

Marilyn Champney

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME: ______________________________

MAILING ADDRESS: IRVING TEXAS

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: PLAZA

HOW MANY TIMES PER YEAR DO YOU VISIT?: 12

COMMENTS: POSITIVE ______________________________

NEGATIVE GET RID OF PANHANDELERS + WINO'S

THANK YOU FOR VISITING

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FREMONT STREET Experience

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1

NAME:

MAILING ADDRESS:
WILLOWICK OHIO

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: FITZGERALD

HOW MANY TIMES PER YEAR DO YOU VISIT?: 3

COMMENTS: POSITIVE REALLY ENJOY OUR VISITS.
STAY DOWNTOWN MOST VISITS.

NEGATIVE DO NOT LIKE PANHANDLERS ON DOWNTOWN STREETS.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:

NAPA CA 94558

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: LADY LUCK

HOW MANY TIMES PER YEAR DO YOU VISIT?: 2-4

COMMENTS: POSITIVE IT LOOKS GREAT!

NEGATIVE I DON'T THINK PANHANDLING SHOULD BE ALLOWED. YOU HAVE NO WAY OF KNOWING WHO THESE PEOPLE ARE OR IF THE MONEY DOESN'T REALLY GO FOR GAMBLING.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME: [redacted]

MAILING ADDRESS: [redacted]
LV

ARE YOU A RESIDENT OF LAS VEGAS?: YES

IF VISITING, WHERE ARE YOU STAYING?:

HOW MANY TIMES PER YEAR DO YOU VISIT?:

COMMENTS: POSITIVE

NEGATIVE Bums, Vagabonds
ON EVERY CORNER

THANK YOU FOR VISITING

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WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:

LAS VEGAS NV

ARE YOU A RESIDENT OF LAS VEGAS?: YES

IF VISITING, WHERE ARE YOU STAYING?:

HOW MANY TIMES PER YEAR DO YOU VISIT?:

COMMENTS: POSITIVE great possibilities - should create great interest.

NEGATIVE get rid of migrants, bums & panhandlers.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:
S.D CA

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: Union Plaza & Carriage House

HOW MANY TIMES PER YEAR DO YOU VISIT?: 4

COMMENTS: POSITIVE We Think The new improvement is great.

NEGATIVE Do not Like panhandling Please get rid of it.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:
LAWTON, OK

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: FITZGERALD

HOW MANY TIMES PER YEAR DO YOU VISIT?: 5

COMMENTS: POSITIVE CLEAN UP DOWNTOWN

NEGATIVE PANHANDLING BEGGARS
PROSTITUTES ETC.

THANK YOU FOR VISITING

FREMONT STREET Experience

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:
Nashua, NH

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?: 4 Queens

HOW MANY TIMES PER YEAR DO YOU VISIT?: 3

COMMENTS: POSITIVE We love it

NEGATIVE panhandlers

THANK YOU FOR VISITING

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302 East Carson Street
Suite 008
Las Vegas, Nevada 89101
702 382-6397 FAX 702 386-8463

WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:
Oshkosh Wis

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?: Union Plaza & El Cortez

HOW MANY TIMES PER YEAR DO YOU VISIT?: Bout 5

COMMENTS: POSITIVE Love it Vegas - Better than our Indian Casinos

NEGATIVE Being asked for $

THANK YOU FOR VISITING

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302 East Carson Street
Suite 808
Las Vegas, Nevada 89101
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FREMONT STREET
Experience

WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME: ______________________

MAILING ADDRESS: ______________________
Raleigh, N.C.

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?: SAN REMO

HOW MANY TIMES PER YEAR DO YOU VISIT?: 2

COMMENTS: POSITIVE Nice Activities
NO BOREDOM

NEGATIVE BEGGARS - ill MANNERS WITH PERSONNEL AT SAN REMO

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:

LAS VEGAS, NV.

ARE YOU A RESIDENT OF LAS VEGAS?: YES

IF VISITING, WHERE ARE YOU STAYING?:

HOW MANY TIMES PER YEAR DO YOU VISIT?: SEE ABOVE

COMMENTS: POSITIVE FREMONT EXP. IS GOING TO BE A REAL ASSET.

WE ONLY GO DOWNTOWN

NEGATIVE: BUMS? PANHANDLERS-?.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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FREMONT STREET Experience

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NAME:

MAILING ADDRESS:

Orange Ca

ARE YOU A RESIDENT OF LAS VEGAS?: no

IF VISITING, WHERE ARE YOU STAYING?:

Golden Nugget

HOW MANY TIMES PER YEAR DO YOU VISIT?: 4-5

COMMENTS: POSITIVE enjoy downtown.

NEGATIVE transients

THANK YOU FOR VISITING

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FREMONT STREET Experience

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:
LAWTON OK

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: FITZGERALDS

HOW MANY TIMES PER YEAR DO YOU VISIT?: 5

COMMENTS: POSITIVE This will make a world of difference and bring better class of people.

NEGATIVE There are too many bums and prostitutes here now.

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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FREMONT STREET Experience

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:

MANHATTAN BCH CA

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: FREMONT

HOW MANY TIMES PER YEAR DO YOU VISIT?: 4-6

COMMENTS: POSITIVE I LIKE THE NEW FREMONT STREET

NEGATIVE GET RID OF THE BUMS

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME: ________ ________

MAILING ADDRESS: ________

Cavour, SD

ARE YOU A RESIDENT OF LAS VEGAS?: no

IF VISITING, WHERE ARE YOU STAYING?: Fitzgeralds

HOW MANY TIMES PER YEAR DO YOU VISIT?: 3-4

COMMENTS: POSITIVE ________

NEGATIVE Don't care for the constant money solicitations in all the street corner

THANK YOU FOR VISITING

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302 East Carson Street
Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:

Grand Junction, Co.

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: PLAZA

HOW MANY TIMES PER YEAR DO YOU VISIT?: 6

COMMENTS: POSITIVE

NEGATIVE Need To STop The people Asking For money Down Town it not on The STRIP

THANK YOU FOR VISITING

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302 East Carson Street
Suite 808
Las Vegas, Nevada 89101
702 382 6397 FAX 702 386-8463

WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS: WOODLAND HILLS CA.

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?: Golden Nugget

HOW MANY TIMES PER YEAR DO YOU VISIT?: 2-4

COMMENTS: POSITIVE Love the IDEA.

NEGATIVE Very apprehensive of beggers and drunks. Leaves you feeling very unsafe. Hope something will be done to secure area.

THANK YOU FOR VISITING

FREMONT STREET EXPERIENCE
302 East Carson Street
Suite 800
Las Vegas, Nevada 89101
702 382-6397 FAX 702 386-8463

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME: [redacted]

MAILING ADDRESS: [redacted]

Lovington, N.M.

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?: Golden Gate

HOW MANY TIMES PER YEAR DO YOU VISIT?: 4 to 6

COMMENTS: POSITIVE

NEGATIVE Dont like the people on Corners begging.

THANK YOU FOR VISITING

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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:

Las Vegas . Nv.

ARE YOU A RESIDENT OF LAS VEGAS?: Yes

IF VISITING, WHERE ARE YOU STAYING?: —

HOW MANY TIMES PER YEAR DO YOU VISIT?: —

COMMENTS: POSITIVE Good idea to have the panhandlers asked to leave Fremont Street

NEGATIVE

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:

Phillipsburg KS

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?:

Union Plaza

HOW MANY TIMES PER YEAR DO YOU VISIT?: 1 - 2

COMMENTS: POSITIVE great - but do something with panhandlers! Bus stop for metro better marking

NEGATIVE

THANK YOU FOR VISITING

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WELCOME TO THE
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PREVIEW CENTER

NAME:

MAILING ADDRESS:

WOLCUTT, N.Y.

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: FITZ GERALDS

HOW MANY TIMES PER YEAR DO YOU VISIT?: APPROX 3 TO 5

COMMENTS: POSITIVE LIKE DOWNTOWN MUCH BETTER

NEGATIVE PAN HANDLERS

THANK YOU FOR VISITING

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FREMONT STREET Experience

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NAME:

MAILING ADDRESS:

DALLAS TX

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?:

GOLDEN NUGGET

HOW MANY TIMES PER YEAR DO YOU VISIT?: 6 - 8

COMMENTS: POSITIVE LIKE DOWN TOWN

NEGATIVE GET RID OF PAN HANDLERS

CLEAN UP DOWNTOWN STRIP

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:
Lynn Haven FL

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?:
Lady Luck

HOW MANY TIMES PER YEAR DO YOU VISIT?: 2

COMMENTS: POSITIVE
- Like downtown -

NEGATIVE Too many pan handlers

THANK YOU FOR VISITING

FREMONT STREET Experience

WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME: ______________________

MAILING ADDRESS: ____________ ____________

FARGO, ND.

____

____

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: PLAZA

____

____

____

HOW MANY TIMES PER YEAR DO YOU VISIT?: 1

COMMENTS: POSITIVE ______________________

NEGATIVE dirty streets, flyers all over

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE FREMONT STREET EXPERIENCE PREVIEW CENTER

NAME:

MAILING ADDRESS:
WORCESTER, MA

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: LADY LUCK

HOW MANY TIMES PER YEAR DO YOU VISIT?: 2

COMMENTS: POSITIVE LOOKING GOOD!

NEGATIVE KEEP THE STREET BUMS OFF THE STREETS

THANK YOU FOR VISITING

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Suite 808
Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS: Marietta GA

ARE YOU A RESIDENT OF LAS VEGAS?: N

IF VISITING, WHERE ARE YOU STAYING?: Tres Is

HOW MANY TIMES PER YEAR DO YOU VISIT?: 2

COMMENTS: POSITIVE [illegible]

NEGATIVE To many scary people on Street

THANK YOU FOR VISITING

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Las Vegas, Nevada 89101
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WELCOME TO THE
FREMONT STREET EXPERIENCE
PREVIEW CENTER

NAME:

MAILING ADDRESS:

Cypress Calif

ARE YOU A RESIDENT OF LAS VEGAS?: No

IF VISITING, WHERE ARE YOU STAYING?:

Plaza

HOW MANY TIMES PER YEAR DO YOU VISIT?: 4

COMMENTS: POSITIVE Lights and glitter of the street

NEGATIVE Don't like the Solators -

THANK YOU FOR VISITING

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FREMONT STREET Experience

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NAME:

MAILING ADDRESS:

SPOKANE, WA.

ARE YOU A RESIDENT OF LAS VEGAS?: NO

IF VISITING, WHERE ARE YOU STAYING?: PLAZA

HOW MANY TIMES PER YEAR DO YOU VISIT?: 1

COMMENTS: POSITIVE LOVE THE RODEO

NEGATIVE PANHANDLERS!
NEED MORE THINGS TO DO OTHER THAN GAMBLE – GETS BORING!
PUBLIC TRANSPORTATION STINKS!

THANK YOU FOR VISITING

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