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Oliver Lovat

The Denstone Group, oliver@denstone-re.com

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ELVIS WHO?

UNDERSTANDING, ATTRACTING AND RETAINING THE NEXT GENERATION OF LAS VEGAS CUSTOMERS

Oliver Lovat

ABSTRACT: Las Vegas is in the middle of a period of generational transformation. The visitor profile has changed greatly since 2007, however the behavior and attitudes of this new visitor are very different that of previous generations of visitors. By undertaking a survey of this group we identify several key trends that make this group unique. Not only does this new visitor come to Las Vegas more frequently, follow Las Vegas when they are not in the city, they demonstrate planning and spending patterns that are unlike any other group. This paper analyses the next generation of visitor, and suggests methods to capture loyalty and market share.

Keywords: Strategy, Loyalty, Casinos, Millennials, Las Vegas

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Introduction

Las Vegas is always changing.

As the desert and western themes blew away to welcome 1950s and 1960s luxury, which in turn were imploded to meet the needs of the themed megaresorts of the late 20th Century, the rebuilding and repositioning of assets post-2007 recession has focused not on the baby boomers, but on younger customers widely defined 'Millennials.' The behavior of these customers is very different to past generations.

As we address in this paper, this next generation of

customer behaves in different ways as Boomers, Gen X and Y, yet has embraced Las Vegas as passionately as any other generation of customer.

Las Vegas resorts have traditionally adopted two methods of capturing sustainable competitive advantage; location or loyalty, and if loyalty is the chosen method, segmenting and understanding the target customer base is of primary importance.

In the 2012 research, Pyramids to Players Clubs, this author noted the 21-28 age group had distinctive characteristics that were at variance with the rest of

the sample population. Contrary to the conventional view, the spend of this group is comparable with other segments, (indeed some commentators observe that their overall spend per trip is higher than other generations of customers) but unsurprisingly they have other noticeable traits in decision making on which resort to book when staying in Las Vegas.

The Reinvention of Las Vegas

In 2015, visitation to Las Vegas was over 42m, c.2m more than in 2007, but in 2007 gaming revenues were over \$1b greater. On immediate review this seems that more visitors came and spent less in 2015 than 2007, however on closer inspection, we note that there was a profound shift in demographic of visitor, who spent increased revenue on other products other than gaming.

In 2015, 20% (c.8m) of visitors to Las Vegas were international customers (excluding visitors who flew to another state and made their way to LV domestically). In 2009 this was 14% (c.5.3m).

In 2009, 29% of visitors were under 40 (c.10.5m). By 2014 this was 44% (c.18m) although falling to 35% in 2015 (14.7m). This makes Las Vegas one of the most visited cities for millennials.

It is undoubted that Las Vegas has succeeded in reinventing itself as a destination location for the next generation, with many in the mainstream media, which had predicted the decline of Las Vegas, is now reporting on its rebirth. But all are fixated on gaming revenue as the indicator of success, but on closer examination, gaming is only part of a range of revenue streams ranging from F&B, Rooms and other entertainment surpassing gaming spend.

With the recent increase in ADRs and hotel revenues, 2015 data indicates a full recovery to 2007 levels, with many key revenue drivers exceeding 2007 levels, however, the changing demographic of the Las Vegas visitor has been both cause and effect of the emergence of Las Vegas as a global center for non-gaming experiences, including nightlife.

This shift from gaming to entertainment as the revenue driver in Las Vegas began decades ago, but the manner in which younger demographics (Generations X, Y and increasingly Millennials) has embraced Las Vegas come as a surprise to many of the traditional owners.

The nightlife element was conceived at the height of the US financial crisis to attract this particular demographic with the intent to drive and supplement gaming revenue in the properties to compensate from

the decline in baby boomer spend. The non-gaming revenue increased, but the gaming did not immediately, but recent numbers show that it has.

Recent capital projects (The Linq, MGM Park and the SLS) have all sought to harness the Millennial demographic. The Innovation Group reports that of the respective budgets, Millennials spend 46% of their Las Vegas vacation budget on non-gaming activities (17% on shopping, 12% on entertainment and 17% on F&B) and 54% on gaming compared to 23% of baby boomers on non-gaming and 77% on gaming.

Defining Traits of Millennials

“Millennials embody the generation born between 1977 and 1995. There are 80 million of them, which makes their generation larger than the Baby Boomers (born 1946 to 1964) and three times the size of Generation X (1965-1976). They make up roughly 25% of the U.S. population.

Millennials have an annual direct spending power estimated at \$200 billion. Their indirect spending power each year is approximately \$500 billion, largely because of their strong influence on their parents. It’s predicted that Millennials’ spending power will increase as their earning power grows.

Millennials have grown up in an era of unprecedented wealth and rapid technological advancement. In fact, they are expected to remain the most affluent generation. They have habits and preferences regarding communication, personal interaction and purchasing that are significantly different than those of older generations in many ways.”

(Barkley, BCG, SMG)

Characteristics

Nielsen, in their research into the sector, note:

“Millennials are characterized by more than just their age. As a group, they’re more racially and ethnically diverse than any previous generation. They value self-expression and artistic pursuits. They’ve been hard hit by the recent turbulence in the economy, but their high education levels and optimism foreshadow their potential future success... Given their small paychecks, they are savvy shoppers always on the lookout for a good deal. Millennials put a premium on authentic, handmade, locally produced goods – and they’re willing to pay more for products from companies with social impact programs. Getting a good deal is a priority, but they won’t compromise on quality. They want to feel good about what they buy.”

“Millennials score high on IQ tests. They also score

higher on such traits as extraversion, self-esteem, self-liking, high expectations, and assertiveness. These traits are purported to often lead to narcissism and entitlement.

This generation masters self-expression, with 75% creating a profile on a social networking site, 20% posting a video of themselves online, 38% with one to six tattoos, and 23% with a piercing in some place other than an earlobe. There is also a trend toward personal branding, which, on its surface, appears self-promoting. Looking a bit deeper reveals a method for young people to identify their passions and determine the most expedient path forward, rather than having others set a path for them.”

The outward expression is identity and cultural behavior:

They “form a unique identity. They love music and art and value creativity—specifically rap, hip-hop, alternative and reggae music and fine art. The 25-34 year olds download more music than all other generations, 30+ songs in the past six months. In addition to downloading music, they also top the charts for streaming music, especially the Millennials between the ages of 25-34.”

“In addition to being smart about their spending, Millennials also desire authenticity...as well as education on where goods are produced. “Made in America” is no longer enough of a draw the way it was with the older generations.”

Technological Engagement

“Technology is part of the Millennial identity as a generation. They’re the first to come of age with cable TV, the Internet and cell phones. When asked what makes their generation unique, Millennials ranked “Technology Use” first (24%), followed by “Music/Pop Culture” (11%), “Liberal/Tolerant” (7%), “Smarter” (6%) and “Clothes” (5%). In contrast, Boomers ranked “Work Ethic” as the most defining characteristic of their generation. Millennials have a more positive view of how technology is affecting on their lives than any other generation. More than 74 percent feel that new technology makes their lives easier, and 54 percent feel new technology helps them be closer to their friends.”

“They use mobile devices to read user reviews and explore information on social networks. Having grown up with mobile and digital technology as part of their everyday lives, they switch their attention between media platforms 27 times per hour. This tells advertisers that they need to engage Millennials quickly before they lose their attention.

Millennials also seek peer affirmation. Seventy percent of Millennials are more excited about a decision they’ve

made when their friends agree, compared with 48% of non-Millennials.

Millennials’ relationship with technology has completely changed their relationships with most everything. With brands and services, what used to be a one-way conversation is now a multifaceted, 24-hour-a-day, seven-day-a-week dialogue between brands and their customers and among their customers. They have the confidence to stand up for what they believe and the confidence, technology, and network to voice their opinions. With Millennials, brands know where they stand, sometimes even minute to minute. According to one survey, 86% of Millennials are willing to share information about their brand preferences online, making it a top personal identifier.

Millennials are 2.5 times more likely to be early adopters of technology than are older generations. They are more likely to use the Internet, broadcast thoughts, and contribute content. Millennials stand out when it comes to producing and uploading online content (60%) compared with non-Millennials (20%). In 25% of searches for the top 20 brands, results are links to user-generated content.^{M8} This has huge implications for brands to become aware of others’ experiences of their product or service and ensure that it is in harmony with their brand strategy.“

Travel

“Millennials have lived their entire lives in the jet age and love the idea of traveling ... In fact, four-in-ten Millennials have taken a trip abroad at some point in the last three years. Yet interestingly, they’re the generation least interested in international events and have only average interest in learning about other cultures.”

Barkley, BCG, SMG also note that Millennials are significantly less likely to travel for family reunions, relaxation (spa, beach) or to gamble than non-Millennials, but are significantly more likely to travel to “escape with” friends, go to an entertainment event or concert and for a special occasion, such as a birthday or anniversary and their decision drivers are price and convenience.

Location

Nielsen identifies the key US locations where Millennials are based, including Las Vegas, which stands at number 8.

Of the top 10 US cities of Millennials ranked by concentration of residency, eight can reach Las Vegas in

Table 1. TOP 10 MARKETS (BY %/INDEX OF CONCENTRATION/FLIGHT TIME TO LV)

1. Austin, TX	(16%, 120, 180mins)
2. Salt Lake City, UT	(15%, 117, 90mins)
3. San Diego, CA	(15%, 117, 70mins)
4. Los Angeles, CA	(14%, 109, 70mins)
5. Denver, CO	(14%, 109, 110mins)
6. Washington, DC	(14%, 109, 5 hours)
7. Houston, TX	(14%, 108, 190mins)
8. Las Vegas, NV	(14%, 108, N/A)
9. San Francisco, CA	(14%, 107, 90mins)
10. Dallas-Ft. Worth, TX	(14%, 106, 160mins)

less than three hours by flight and 5 cities can reach Las Vegas in under two hours by flight.

A defining characteristic of Millennials is the reversion to the urban lifestyle, either living in cities or at home. Nielsen notes that although they are dispersed across the country, they are “much more likely to live in cities on the West Coast. They put a premium on the urban lifestyle and don’t aspire for the suburban white picket fence. If you find them in the suburbs, appeal to them in urban formats and community settings.”

Research Findings

In order to capture loyalty, we must first understand the customer and why they come to Las Vegas.

The Customer

Our initial findings indicate that this group are geographically disparate and 55% see Las Vegas as an entertainment and experience center which acts as an “escape” from their normal routine for short and regular periods.

Although 48.9% of the sample are married 64.2% state that they come to Las Vegas with friends, highlighting the uniqueness of the group, and that the escape may not be from their hometown, but the everyday domestic situation.

The geography and the infrastructure of Las Vegas lends itself to accessibility; it is close by car or air travel to many of the key markets that this customer reside.

Repeat visitation is uniquely high and is across all relationship demographics and especially high as a group activity.

The fact that gaming is evident is not of key concern for visitation, however the group are not opposed to gaming. Indeed, it remains an aspirational activity and as budgets and visitation increase, the Next Generation

of visitors are more likely to gamble.

Over 40% of visitors plan their activities over a month before arrival, and 44% leaving it until they arrive. This allows for marketing opportunities both strategically and immediately for capturing customer spend. Nearly 75% believe that they have all the information that they need on what they are going to do, and refer to peer led social media as the main reference points.

Nearly two-thirds of the sample keep up with that what is going in Las Vegas when they are not here.

Millennials that visit Las Vegas do so many times, with 49% of respondents visiting Las Vegas over 8 times. 55% of Millennial visitors come to Las Vegas to “escape” and although 49% are married, 64% come with friends.

This group are significantly less likely to travel for family reunions, relaxation or to gamble than non-Millennials, but are significantly more likely to come for a special occasion or shared experience, such as a notable birthday or bachelor(ette) party.

Within this generation, there have been significant societal shifts. The traditional nuclear family, of grandparents, parents and children living in close proximity is highly rare, as people relocate, whether for economic or educational reasons. This demographic migration from smaller to larger cities where there are higher concentrations of young people is pronounced, but it also means that families and friends live in separate cities. Perhaps in the past people in different cities lost touch, with modern communication, geography is a lesser barrier to relationships. The research undertaken suggests that although people live in different and disparate cities, when they meet, they do so in Las Vegas.

Customer Behaviors

49% of Millennials gamble mostly in the hotel they are staying, but only 30% spend most of their F&B budget in their host property. Although a profit centers, food, beverage and nightlife also remain key components in the Vegas experience, branding and identity of a resort, but alone are not a driver of loyalty, but rather remain an effective marketing tool.

Why this is important is that average F&B spend has increased from \$254.49 to \$292.00 since 2007, some 15%, whereas other spending areas have either declined or are near par. Overall non-gaming spending has increased by \$45 per person from 2007-2015.

It remains true that the greater amount of gaming expenditure is made in the property that the visitor is staying in, however this is not true of food and beverage,

with a majority spending most of their budget in other properties.

Most customers on lower budgets will spend a greater proportion on Food and Beverage, until those spending between \$400-1000, at which time, the gaming budgets are the greater proportion. We also note that as the customer becomes older, they spend more on gaming.

We also note that almost 50% of the gaming element is spent in the properties that the customer is staying in, however nearly 50% spend their F&B budget is spent in different hotels.

We therefore assume that the F&B element is not a driver for loyalty, but is a driver for visitation – and is an effective marketing piece to bring in customers, but the evidence does not support that once the customer goes to a property, they will gamble.

Unlike past generations, 40% of Millennials decide their Las Vegas schedule over a month before they arrive. 66% of respondents follow Las Vegas news when they are at home. This gives operators a unique opportunity to engage with their customers before, during and post their Las Vegas visit.

The segment is open to engagement and consume information in order to prepare future visits. However, much of this communication is not directly with the operators (26%), but with peer driven sources, such as Facebook (44%), Vegas Tripping (35%) and Trip Advisor (34%) (some respondents cited multiple sources). Nearly 75% of respondents stated they had all the information they need in order to plan their trips in advance of setting foot in Nevada.

What Happens In Vegas...

The popular consensus is that millennials do not gamble. To an extent, this is correct, but a more accurate statement would be millennials do not gamble, YET, or even in the same way as their parents and grandparents. This poses a second question for operators and an ongoing debate is being had by operators, manufacturers and architects is underway with many theories and strategies being proposed.

44% of visitors spend under \$200 on F&B and 33% spend under \$200 on gaming. However, 9% spent more than \$1,000 on F&B, and nearly 25% spent over \$1,000 on gaming – with 2.3% of the sample spending over \$5,000 on gaming.

So, for low spenders, millennials actually spend more on food and beverage than on gaming, but not for those that play more often. Moreover, the amount that would rather spend a sum on food and gaming preferred to

not is about even, thus implying that if the customer had a larger budget in total, they would spend a greater amount on gaming.

We also note that of the players who spend the most on gaming (over \$1000) are those that typically have been to Las Vegas the most often. This is important as if captured as a loyal customer, over time there is significant customer lifetime value opportunities in both gaming and non-gaming spend, and there is evidence of an accelerator effect rather than a linear response to visitation and spend.

61% of Millennials are more likely to visit a nightclub in Las Vegas than their hometown and 60% actually visit nightclubs in Las Vegas. 29% make their choice of hotel based on their nightlife plans, therefore the nightlife component is significantly more relevant than simple F&B provision.

80% of under 40s are prepared to spend more on F&B than in their hometown. We also note that as visitors come more often, they gamble more, and that the customers with the larger gaming budgets are more likely to be loyal to particular properties. This is in effect, a “double whammy” we find that loyal customers are the most profitable – there is a great value to achieving retention.

57% of respondents believe that seeing a performer play live is more special in Las Vegas than in their hometown and 92% believe that they can get a range of experiences in Las Vegas that they cannot get anywhere else.

Visitation

Las Vegas has always been seen as a weekend ‘escape’ (historically from California) and midweek convention hub, but a notable trend in visitation rationale is people catching up with friends who live in different cities. If we assume that wider demographics no longer mean that families no longer live in the same areas and college friends, who disperse after graduation, meet in Las Vegas, this proves that the town is developing as a sustainable national (and international) social center.

We note that almost 50% of respondents have been to Las Vegas over 8 times or more. This is an exceptional statistic which demonstrates that Las Vegas is not a traditional tourist destination location as repeat visitation are exceptionally high. We also note that the higher level of spend is made by those who are more frequent visitors.

We also note that a majority of visitors maintain a relationship with Las Vegas when in their hometowns

and use this to plan in advance. This group of visitors use multiple sources of information including the resort pages, social media and peer led review sites, including tripadvisor and Vegas specific sites such as Vegas Tripping.

So in summarizing what the next generation of customer feels, they typically come with friends, and come often! They know what they are going to do before they come having asked their friends of peer group online – but don't necessarily book it before they arrive. Those that can afford it, gamble, (mostly where they are staying) those that cannot, spend it on food and beverage, but would gamble if they could! They go to bars, restaurants and nightclubs mainly in other properties to where they are staying, and spend more that they would in their normal environment. They welcome the opportunity to go to a concert and seek out new experiences that they can't do in their home locations.

The Riddle Solved: Capturing Loyalty of Millennials

This research was designed in order to understand the drivers of loyalty within this segment of customers. In this end, we note that the main strategies for millennials are customer attraction, with little in the way of retention, other than the traditional methods.

Players Clubs and targeted marketing techniques which proved so effective in the 2000s are increasingly ineffective; this customer eschews the incremental loyalty that was the hallmark of this visitor.

Rather the drivers of loyalty are both functional and emotional. In a functional sense, in attracting this

segment of visitor we note that there are three primary drivers in the decision-making process in choosing which property to stay in: room pricing, reputation and range of amenities. In an emotional sense, we note that the drivers of loyalty are based around concepts of community and shared experiences, rather than aspiration and service drivers.

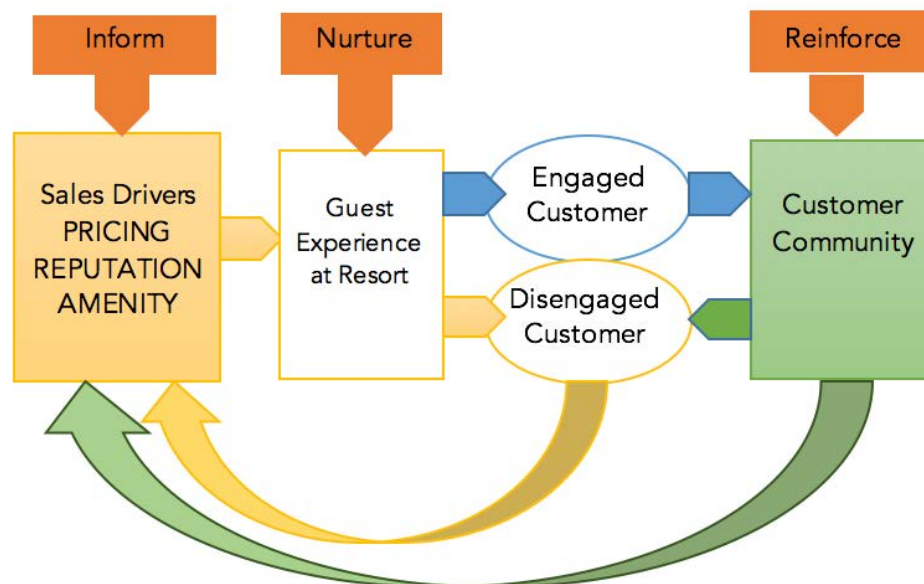
The challenge for operators are how to tailor both the marketing and the experience for this customer and seek to capture their loyalty. Based on the research, we identify a model to effectively attract, engage and retain millennial customers.

The Customer- Operator Engagement Model

The strategy has 3 stages. Initially to Inform the customer, followed by nurturing relationship and finally reinforcing the message. There are multiple methods in implementing this strategy, which a trained strategist can identify, but practical steps are unique for individual properties and operators.

The Las Vegas experience is not just about what happens in Vegas.

The operator that invests in developing the relationship between the customer and community, both physical in terms of amenity but also in environment, culture and communication will achieve a sustainable competitive advantage. And that is the secret of capturing loyalty for the next generation of visitors.



APPENDIX: Survey Data

Fig 1: How many times have you been to Las Vegas in the past 12 months?

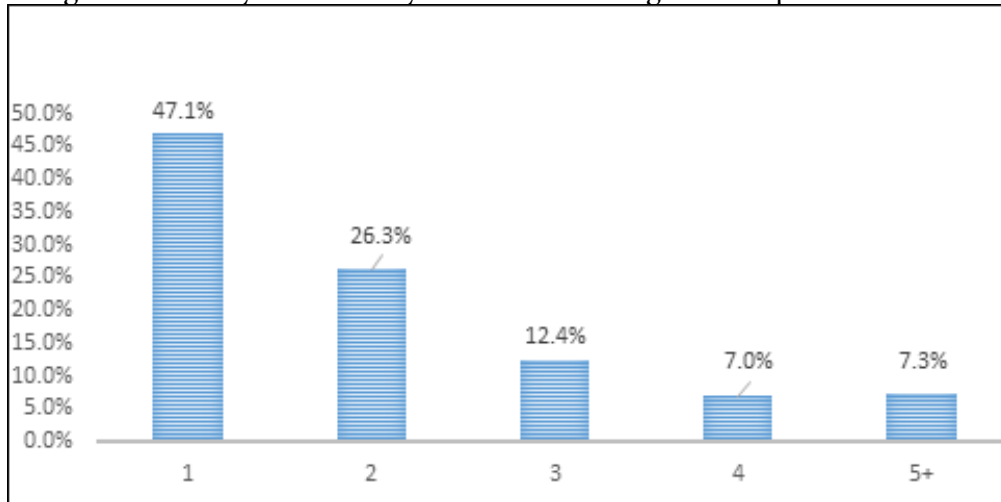


Fig 2: How many times have you been to Las Vegas in total?

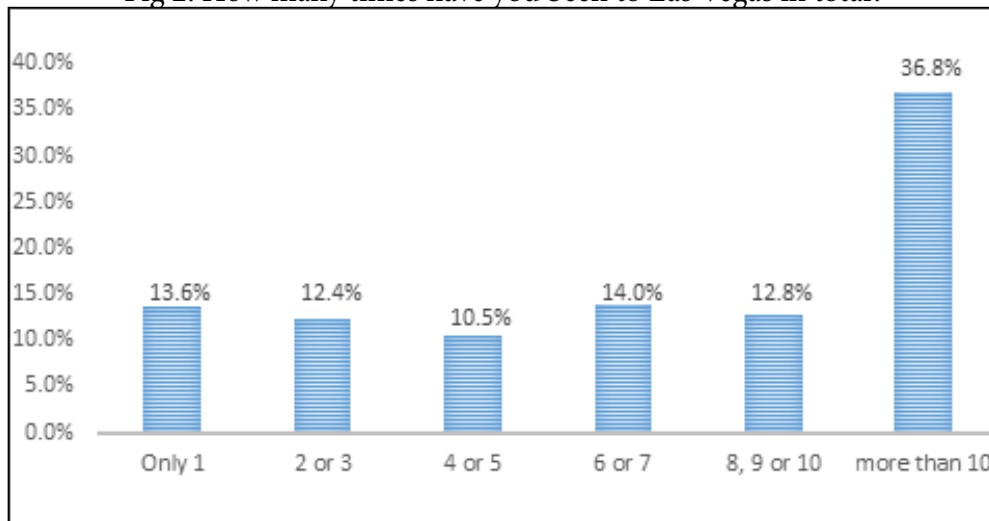


Fig 3: What is your relationship status?

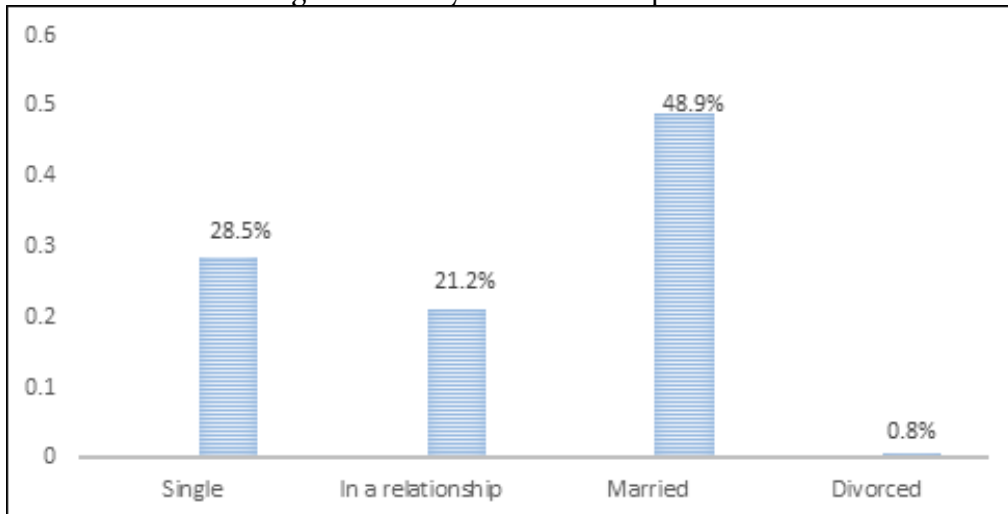
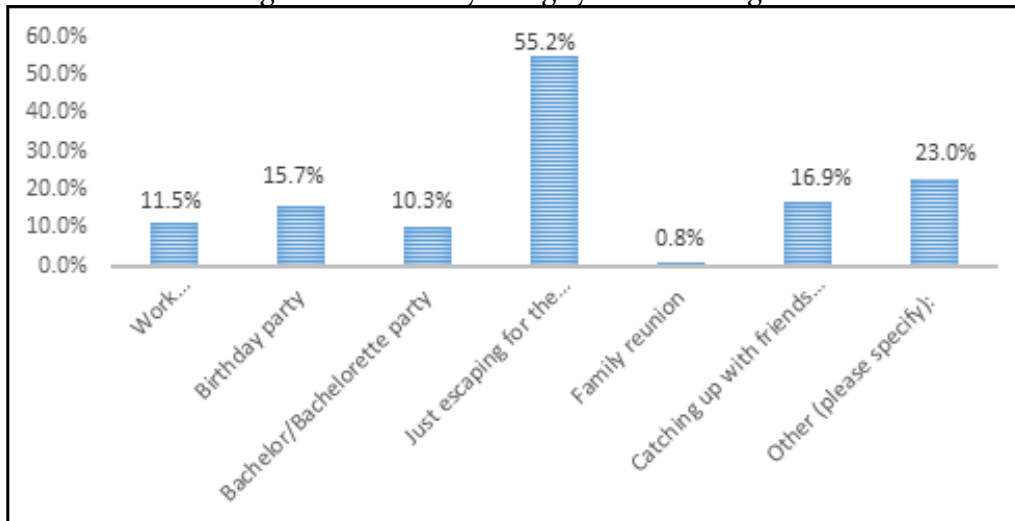
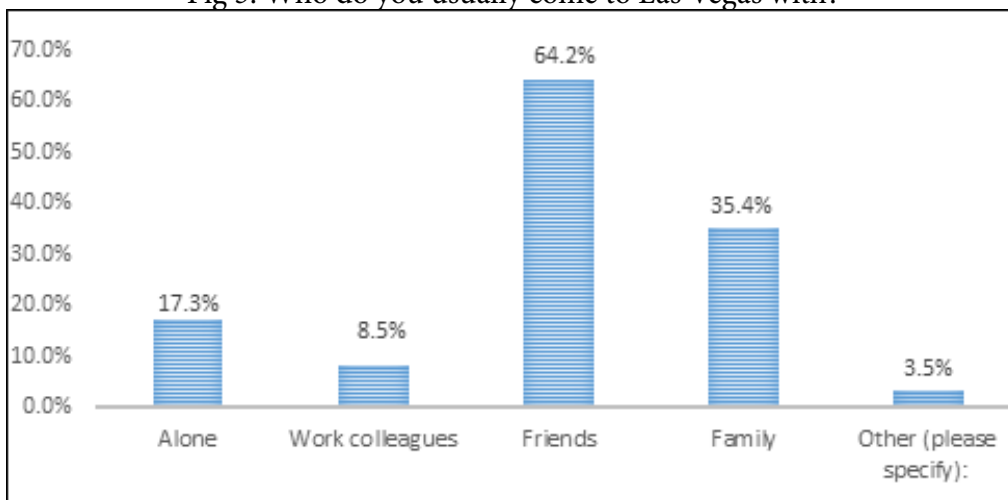


Fig 4: What usually brings you to Las Vegas?



Note: Within the “other” category, responses ranged from gambling and sporting events to ‘adult time’ and ‘decadence’.

Fig 5: Who do you usually come to Las Vegas with?



Spending Habits

Fig 6: How much do you typically spend on Bars and Clubs, and Gaming?

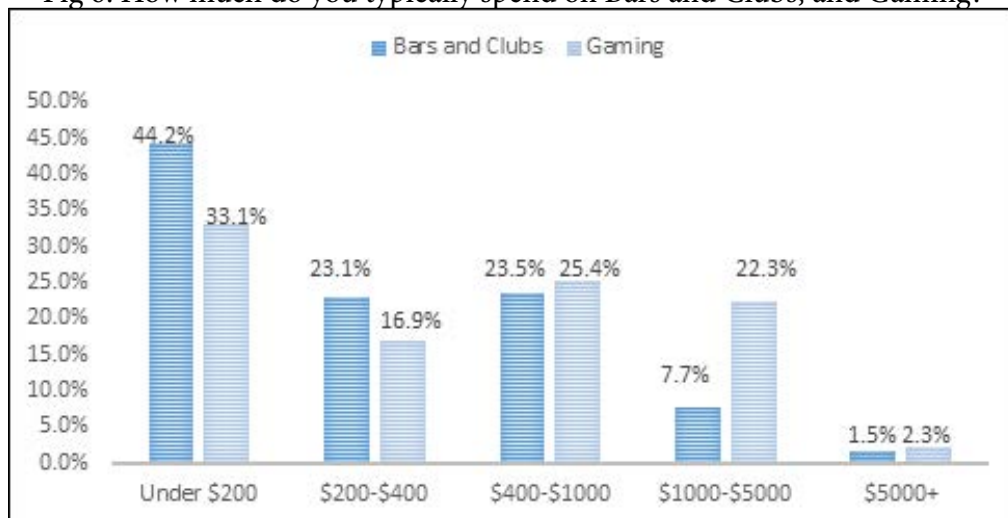


Fig 7: I gamble mostly in the hotel where I am staying.

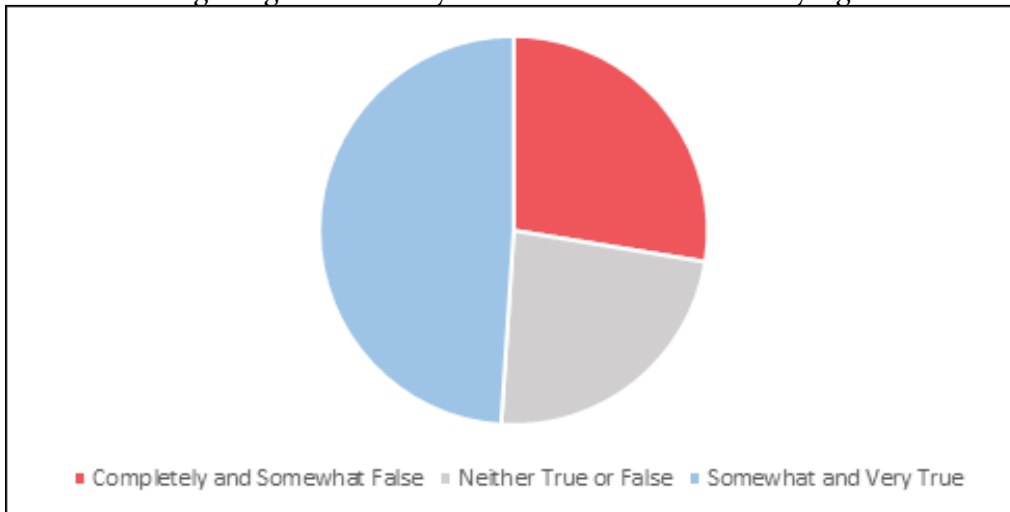
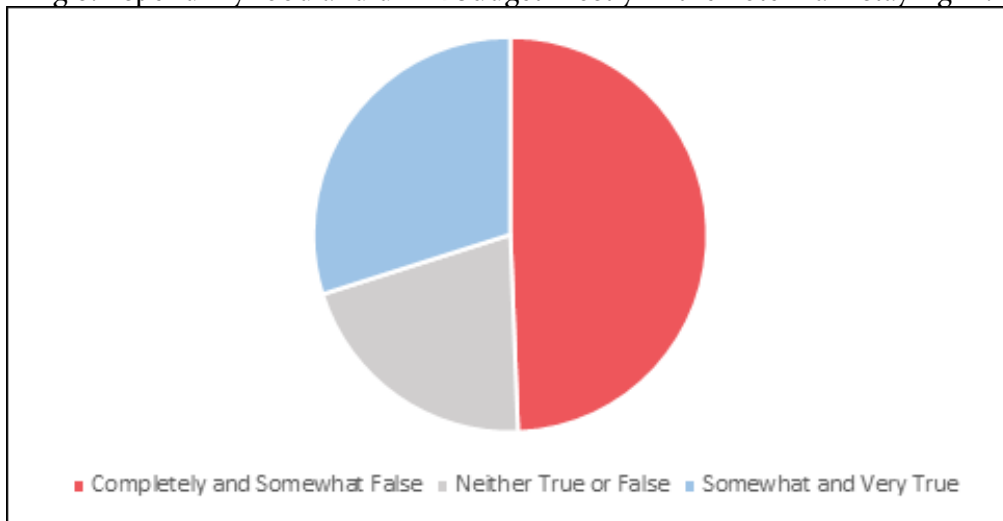


Fig 8: I spend my food and drink budget mostly in the hotel I am staying in.



Planning

Fig 9: When do you finalize your Las Vegas schedule?

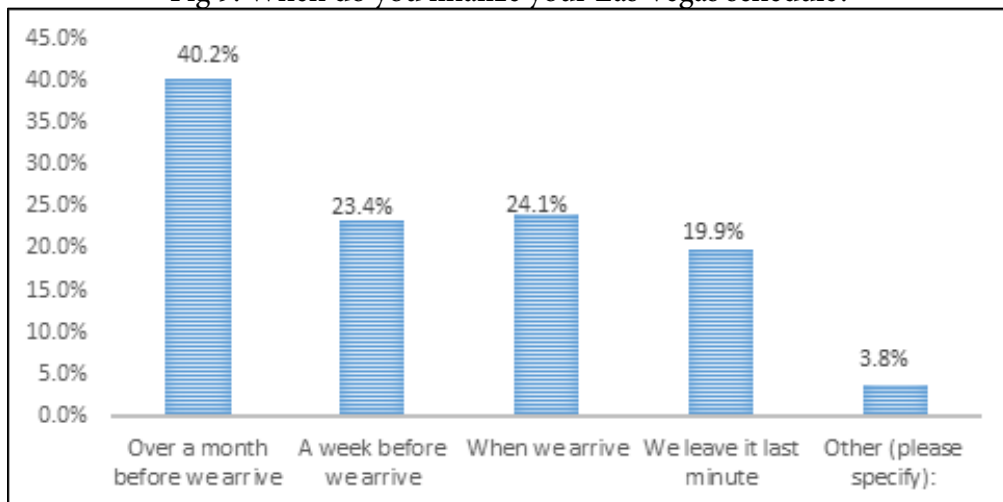
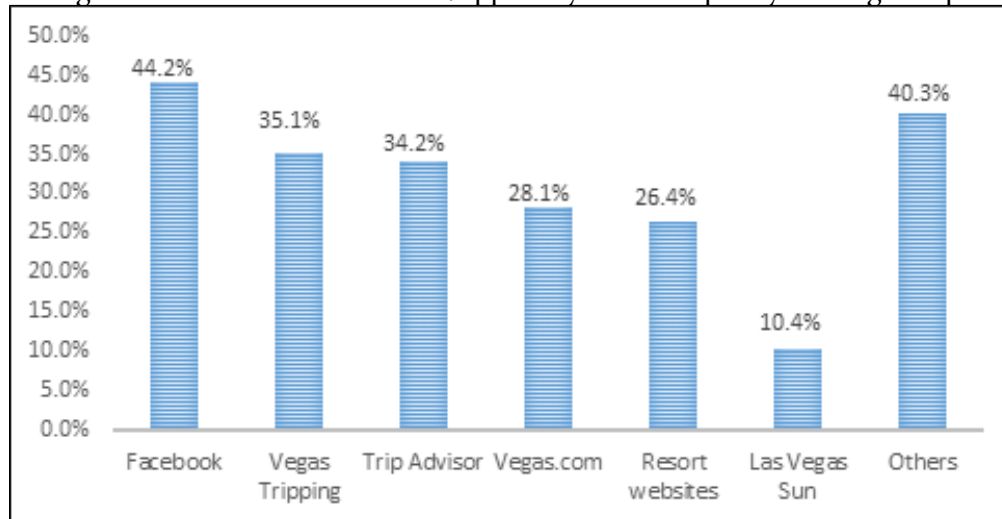
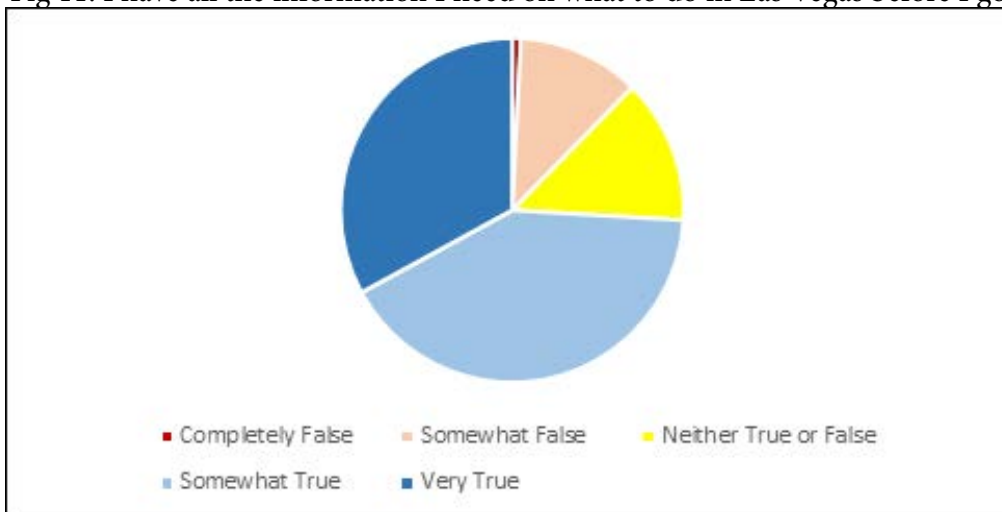


Fig 10: Which of these websites/apps do you use to plan your Vegas trip?



Note: multiple tick boxes were selected, which indicates that respondents researched their trip by using multiple data sources.

Fig 11: I have all the information I need on what to do in Las Vegas before I go.



Nightclubs

Fig 12: I am more likely to go to a nightclub in Las Vegas than in my hometown.

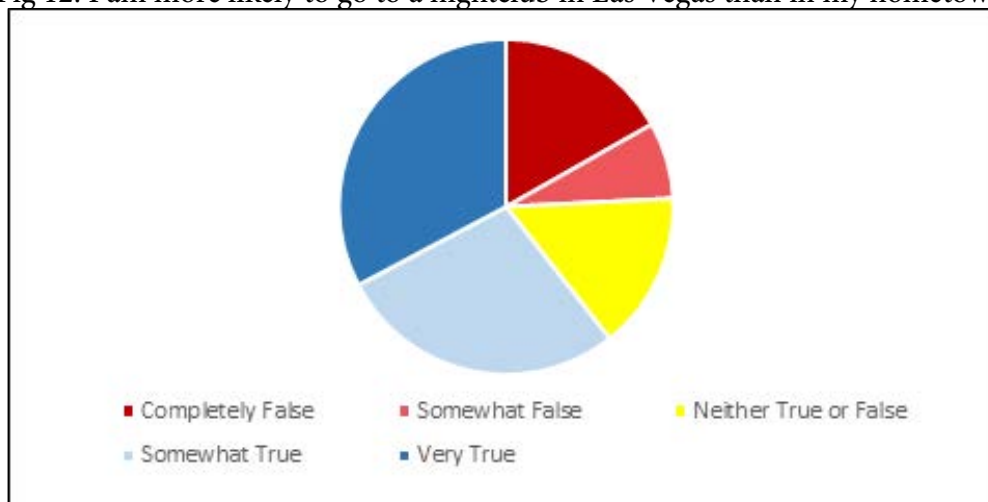


Fig 13: Do you go to nightclubs when in Vegas?

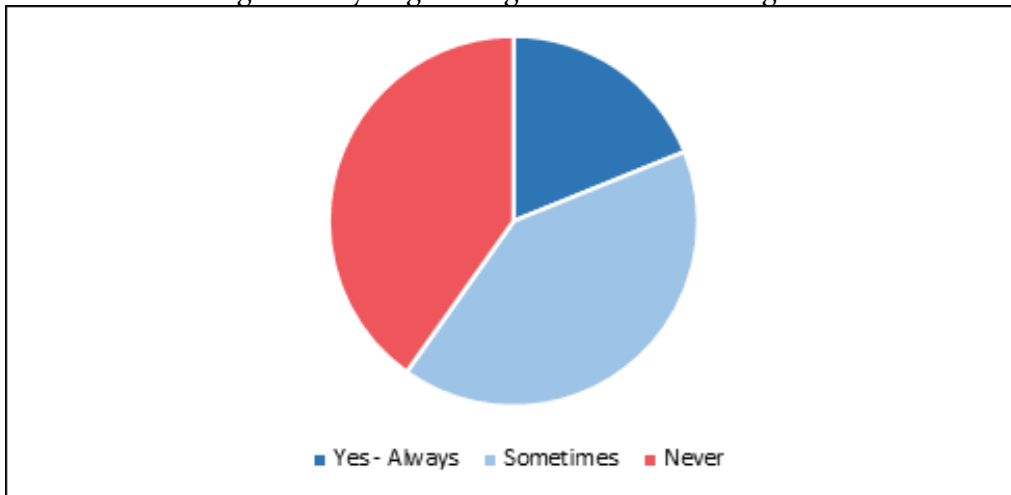
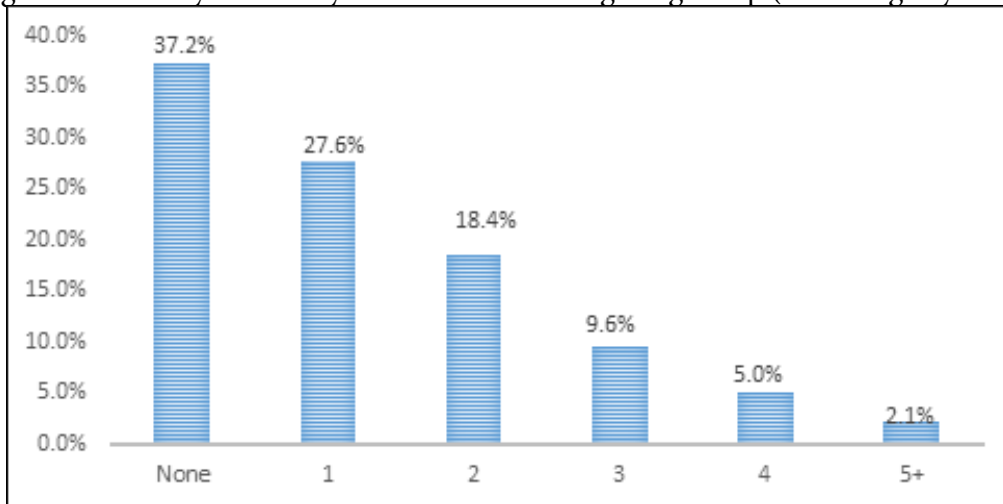


Fig 14: How many clubs do you visit on the average Vegas trip (including dayclubs)?



Customer Attitudes

Fig 15: I typically spend more on food and beverage than in hometown

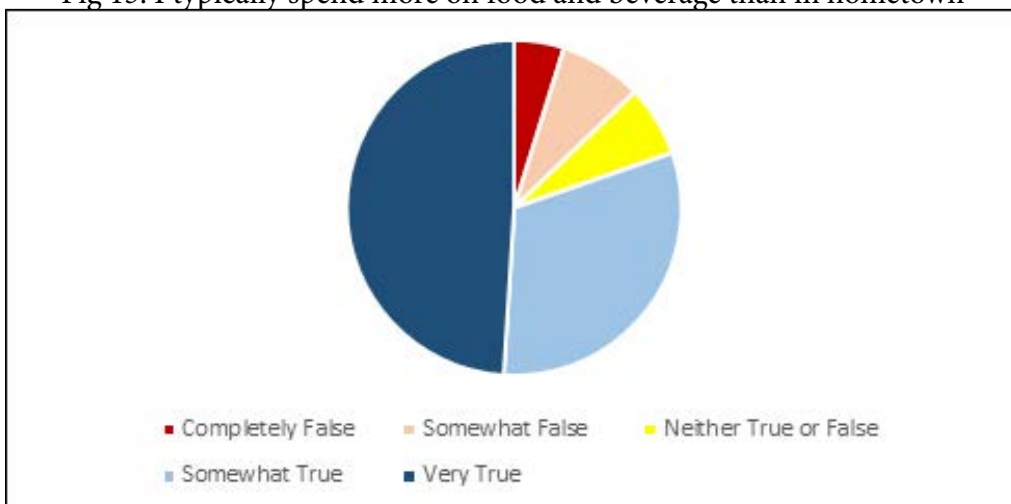


Fig 16: I would rather spend \$1,000 on food and alcohol than on gambling

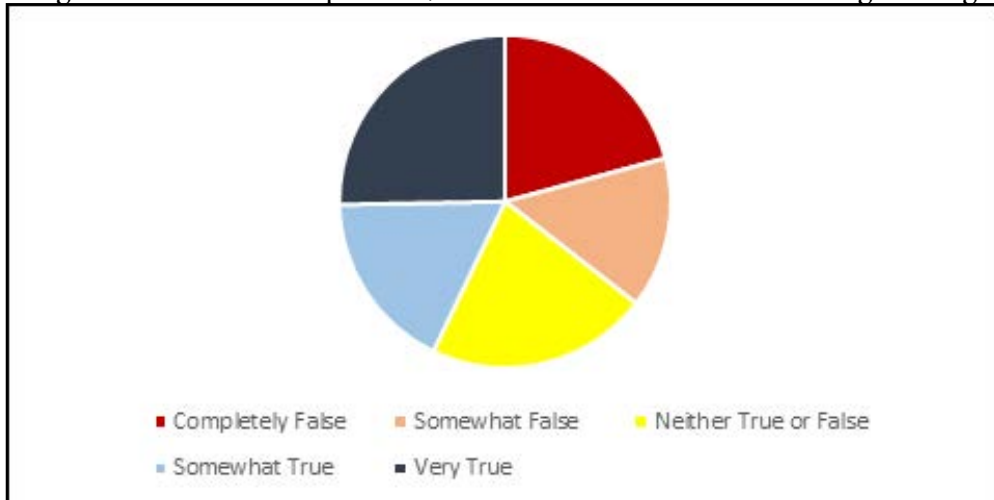


Fig 17: Where I plan to party in Las Vegas affects where I stay in Las Vegas

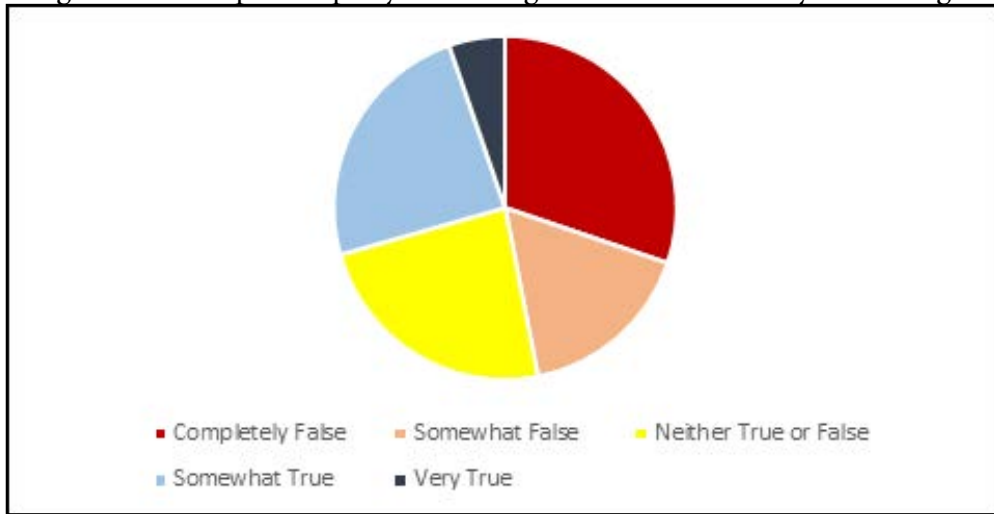


Fig 18: Seeing a performer is more special in Las Vegas compared to my hometown?

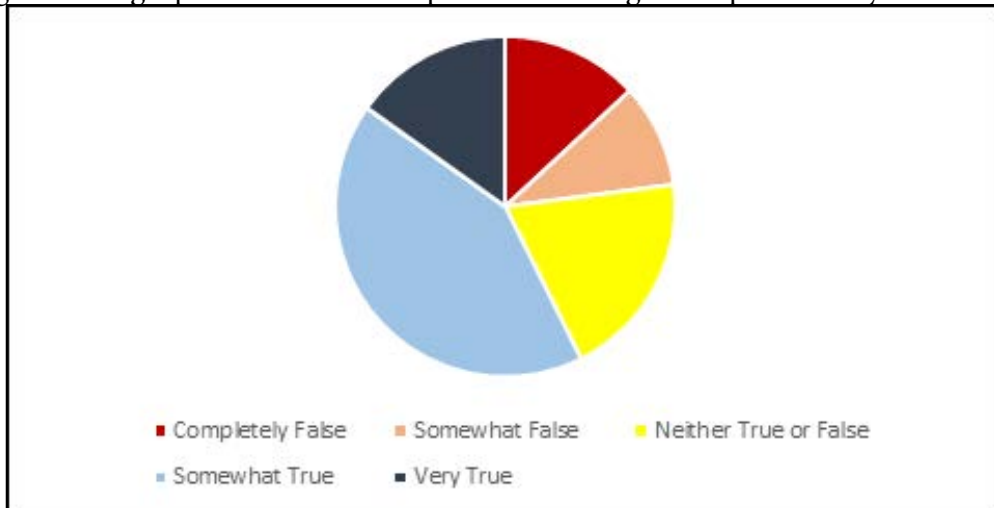


Fig 19: I can get unique experiences in Las Vegas that I can't get anywhere else.

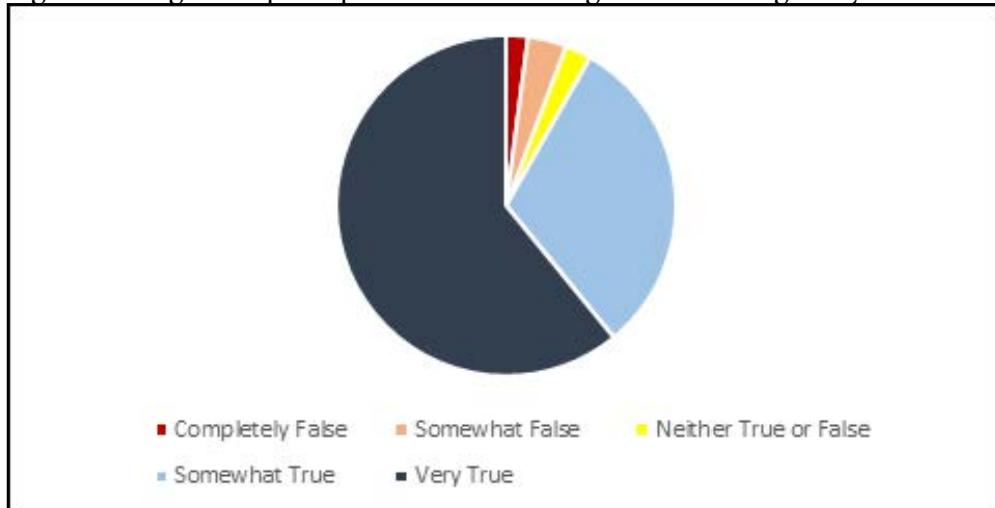


Fig 20: I keep up with what is going on in Las Vegas when I am at home.

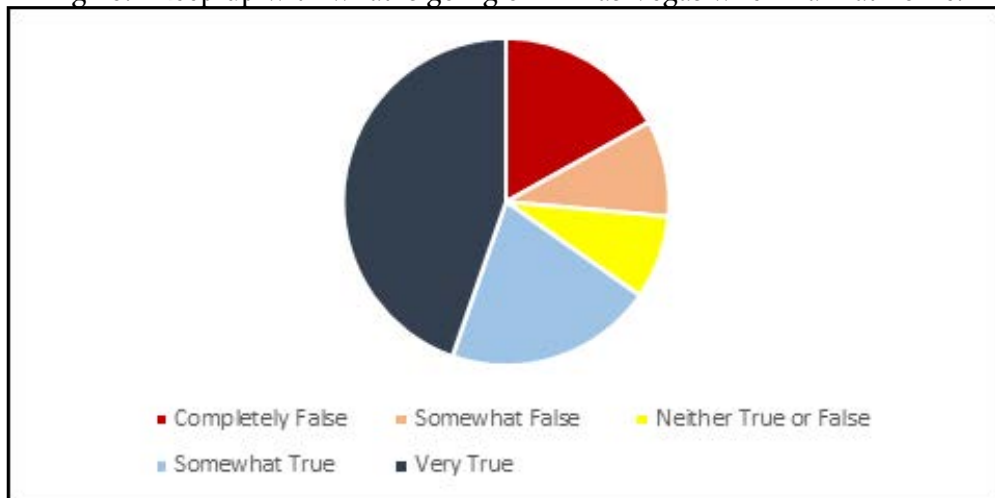


Fig 21: I plan to visit Las Vegas again within six months.

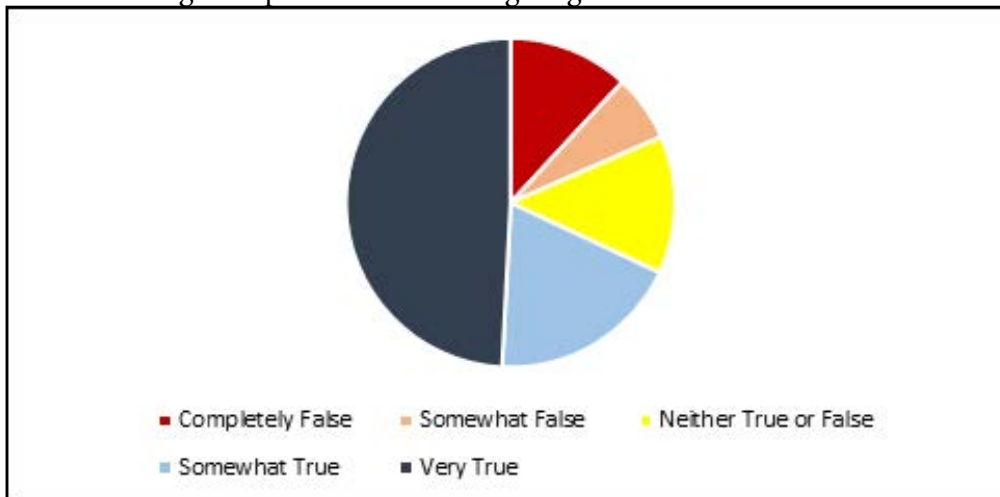
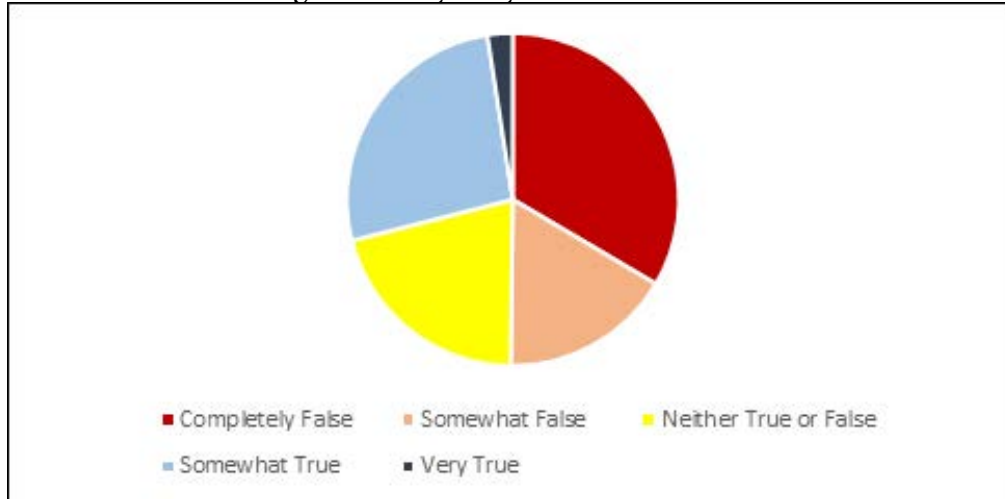


Fig 22: I always stay in the same resort



Expenditure Analysis

Fig 23: How Much Do you spend on non-Gaming (By Visit)

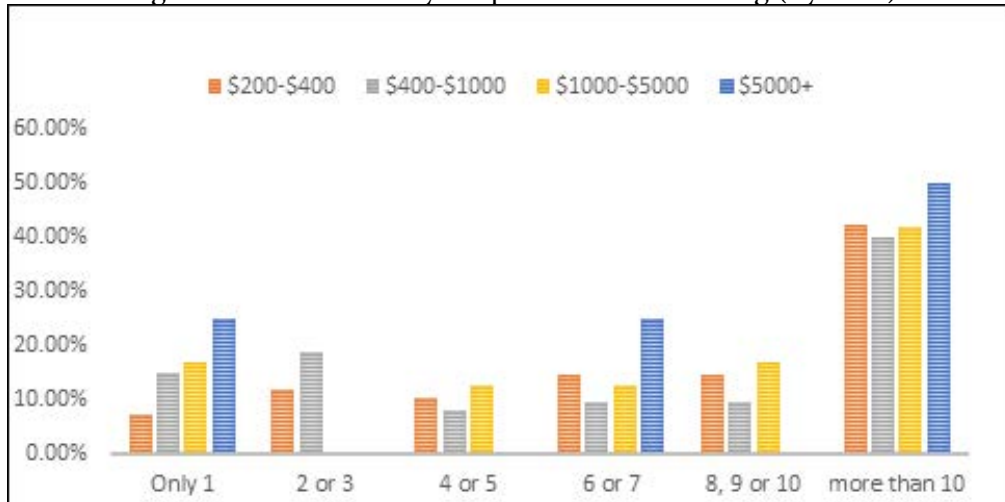
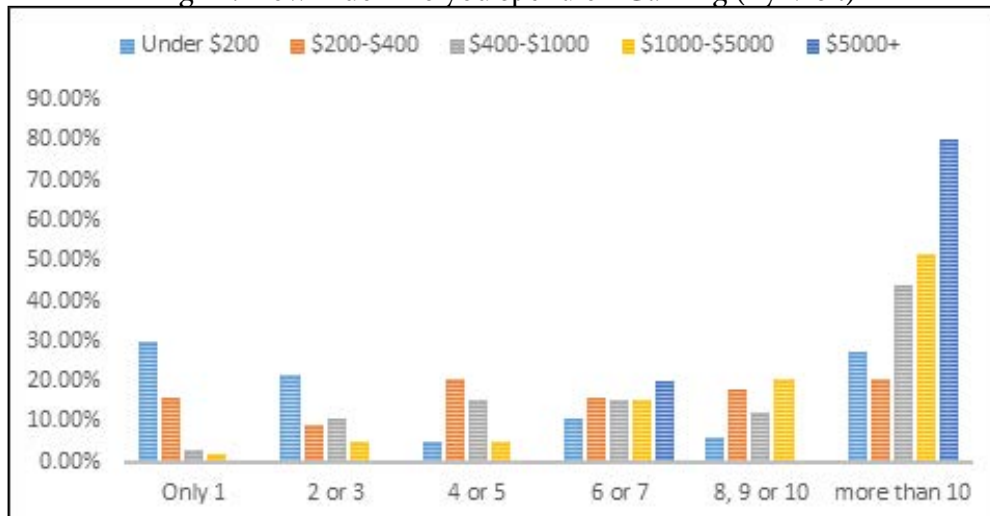


Fig 24: How Much Do you spend on Gaming (By Visit)



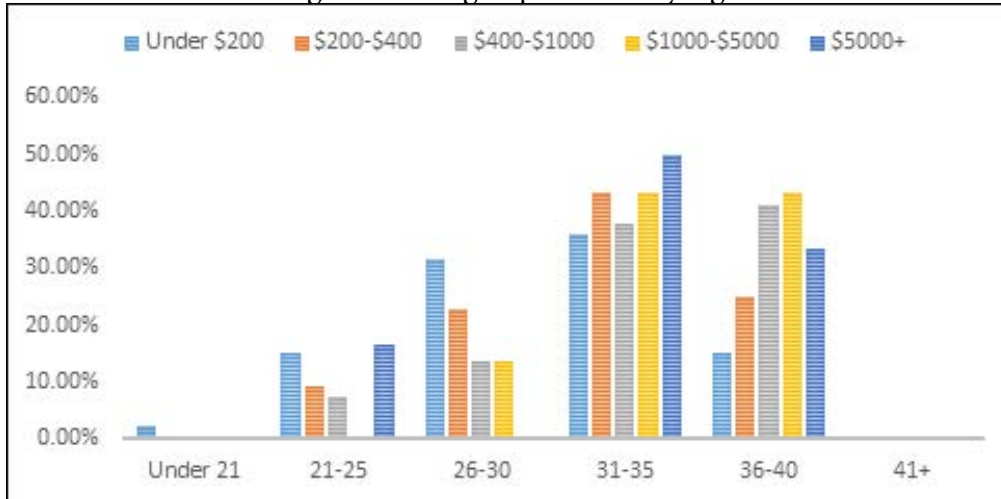
This data can be interpreted that either those people with higher budgets come more often, or that as visitors become more comfortable with Las Vegas and the gaming environment, they are more likely to gamble. However,

the truth may be that these statements are not mutually exclusive and in fact that there is an element of both to be true. It is in the interests of operators to both target loyalty and retention of existing customers, but also to attract new customers and take a view of customer lifetime value.

In terms of understanding spending patterns, we can see that for the customers that do not have a considerable overall budget, the majority is spent on food and beverage, however as those budgets increase, it is noticeable that a greater proportion is spend on gaming.

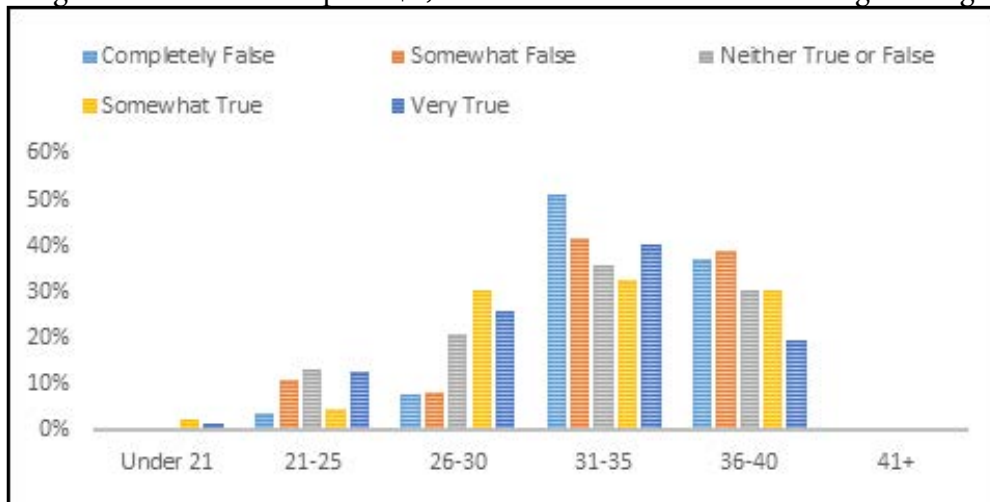
It is also noticeable that as the demographic is broken down, gaming revenues increase with the age of the visitor.

Fig 25: Gaming Expenditure by Age



A long standing fallacy is that Millennials would rather spend money on F&B rather than gaming – this is untrue across all segments:

Fig 26: I would rather spend \$1,000 on food and alcohol than on gambling.



Nightclubs

We note that nightclubs are a significant revenue generator. When analyzing the nightclub visitor data, we see that the expenditure in nightclubs is by a slightly older bracket of the demographic.

Fig 27: More likely to go to a nightclub in Vegas compared to my hometown



Loyalty

Fig 28: I stay in the same resort every time (by visitation).

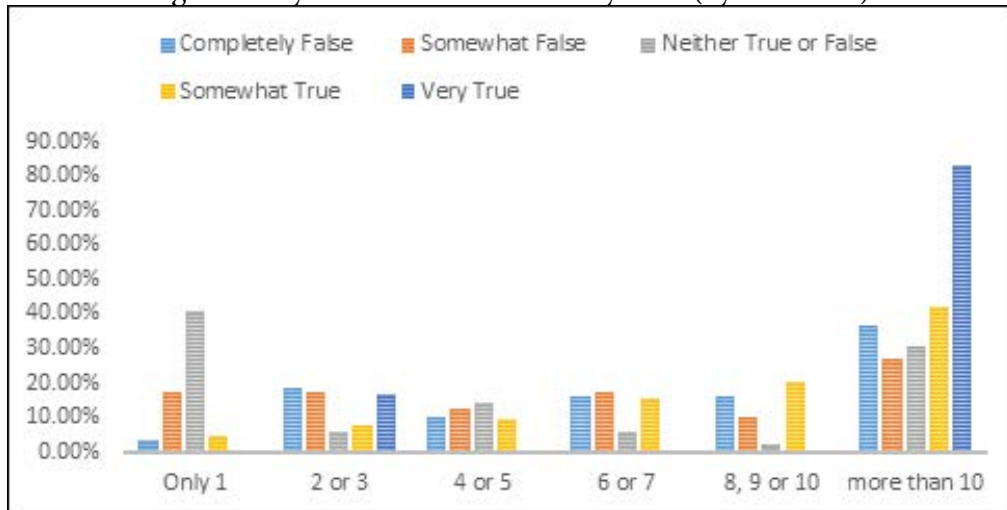


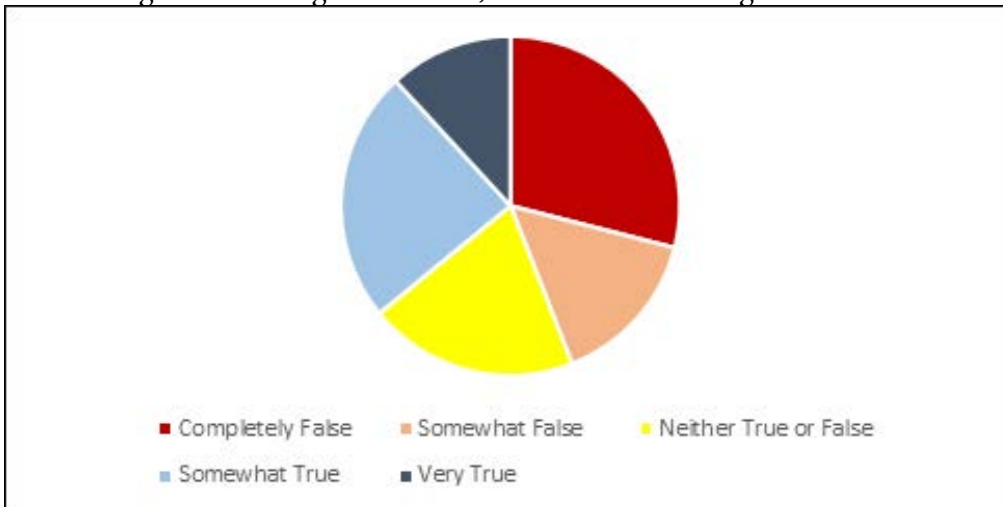
Fig 29: I stay in the same resort every time (by age).



What we observe that loyalty is gained by age and experience, that is in both metrics, a majority of loyal customers are those that have been to Las Vegas the most and those that are of the older element of the demographic.

From a strategic marketing position, this is of some importance. Firstly, this indicates that loyalty can be achieved. Moreover, as the room sale is still the prime determinant of gaming spend, that the potential gaming spend can be captured in the Millennial generation.

Fig. 30 I would gamble more, if I understood the games better.



This provides opportunities for growth in gaming revenues within this customer.



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About the Author

Oliver Lovat is a Fellow of the Royal Institution of Chartered Surveyors, visiting Faculty at The Cass Business School in London and visiting Faculty at the University College of Estate Management.

He founded Denstone Real Estate Advisors in 2011, after spending a decade in real estate investment, development and finance, which takes a customer centric approach on maximizing value from real estate investments. He holds an MBA (Strategy and Finance), Msc (Real Estate Investment), PGC (information Systems) and a BA Hons (Politics and International Relations.)

He lives in Las Vegas.

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