

# A Market Analysis Of The Family Market In Las Vegas

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## Abstract

The family market in Las Vegas is controversial. However, it already exists. It represents 8 percent of the total Las Vegas visitor market. Empirical data, based on a random sample of 2,400 visitors to Las Vegas, are analyzed to provide information relevant to business strategy and public policy development. Research findings indicate significant differences between the family market and other markets. **KEYWORDS:** *family, market, visitors, Las Vegas*

## Introduction

The family market already exists in Las Vegas. It is a market segment within the total Las Vegas market. There is controversy in the Las Vegas casino gambling industry regarding appropriate marketing strategy for the family market. As Steve Wynn of the Mirage says: "It's one thing for the place to be user-friendly to the whole family because the family travels together. It's quite a different thing to sit down and dedicate creative design energy to build for children..." (Andersen, 1994).

The Las Vegas casino gambling market is large, complex, and dynamic. In 1994, it had about 28 million visitors. Concurrently, "Las Vegas residents made 2 million visits to casinos for gambling entertainment....Seventy-five percent of Las Vegas households visited a casino at least once" during the year ("Local Residents," 1995).

Las Vegas domestic visitors come from all areas of the United States. They represent all ethnic groups and socio-economic levels. However, they do not represent a proportional cross-section of the American population in terms of age or gambling propensity. For example, 92 percent of all visitors are adults, and 92 percent of these adults are gamblers.

## Research Objectives

The following research objectives guided the analysis: (1) review cultural values and family dynamics in the context of gambling behavior; (2) describe the behavioral and socio-demographic profiles of the family market; (3) identify similarities and differences between family market gamblers and other gamblers; (4) determine similarities and differences between gamblers and non-gamblers; and (5) indicate market potential and penetration levels of the family market.

## Cultural Values

Cultural values affect casino gambling behavior. They represent direct and indirect influences. They can be linked to consumer behavior in general and casino gambling behavior in particular. Culture is “the set of basic values, perceptions, wants, and behaviors learned by a member of society from family and other important institutions” (Kotler & Armstrong, 1997). Values can be perceived as “shared beliefs or cultural norms about what is important or right.... [Furthermore, values can be understood as influencing] the goals people pursue and the behavior used to pursue those goals” (Bearden, Ingram, & La Forge, 1995).

Culture “consists of learned responses to recurring situations” (Keegan, 1995). It “reflects the human aspect of a person’s environment; it consists of beliefs, morals, customs, and habits learned from others” (Jeannet & Hennessey, 1995). It “influences every facet of our lives, including the consumption of products and services” (Akhter, 1994). Purchase behavior is a function of the social environment (e.g., culture), individual differences (e.g., life-styles), and situational factors (e.g., in-store stimuli) (Bearden, Ingram, & La Forge, 1995).

Societies, countries, or sub-cultures have core and surface cultural values. A core cultural value in the United States is progress, i.e., “people can improve themselves” (Schiffman & Kanuk, 1991). There are many surface cultural values. These contemporary values are rooted in core values, but they change over time. Popcorn (1996) discusses sixteen contemporary values (e.g., cocooning) affecting United States consumers.

Contemporary cultural trends are favorable to the development of casino gambling. These trends affect potential casino gambling customers, including the family market. There is no evidence to suggest that the family market is not influenced by the same general cultural pressures as any other members of society.

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Contemporary consumer needs are associated with cultural trends. They are converted by the consumer into benefits sought. The benefits offered by casino gambling match benefits sought by many consumers. For example, the benefits sought associated with Popcorn's (1996) cultural trends, such as fantasy adventure, are satisfied by benefits offered by casino gambling.

## Family Dynamics

Family dynamics are a function of shifts in a community's cultural values. They are also a determinant of these values. Families in the United States are undergoing structural transformations, new experiences, and attitude changes.

### **Family households constitute about 70 percent of all American households.**

A family can be defined as "two or more persons related by blood, marriage, or adoption who reside together." This can include a traditional family, or one

adult with one or more children, or two adults with his, her, and their children (Schiffman & Kanuk, 1991).

Family households constitute about 70 percent of all American households. About 35 percent of all households (about 50 percent of family households) contain dependent children (children under 18 living at home). Non-family households represent about 29 percent of all households (Current Population Reports 1986; Waldrop, 1989).

The traditional image of a family household as a young husband and wife with two young children does not reflect modern reality. Many families do not have children. Many others do not have dependent children. Others are single parent households. About 25 percent of American children live in mother-only households (Kids Count Data Book, 1995).

"Couples with no children under 18 now make up almost half of all families"....By the year 2000, 47 percent of all households will be non-family or single-parent households—the fastest-growing categories of households" (Kotler & Armstrong, 1994).

Adult family members already have a history of family and non-family consumption. They have consumed as singles and couples without children. They currently have many experiences outside of the family setting. They are knowledgeable and sophisticated consumers. They are accustomed to variety, choice, convenience, quality, service, day care facilities, a fast pace, and instant gratification. Many have dual incomes. However, they have less time than before marriage or attaining family status, especially less joint free time with spouse and children. On the other hand, they are protecting their leisure time. "Rather than forgoing leisure hours, Americans are mainly substituting market work for home work—a trend fostered by smaller families, labor-saving appliances, and other developments [such as buying prepared food for consumption at home]" (Koretz, 1995).

Family adults want new experiences for themselves and their children. There is "renewed emphasis on the family and on vacations as a way to reunite busy

families....[Dennis Marzella of Robinson, Yesawich and Pepperdine, Inc. notes that] consumers are looking for leisure experiences that offer something different but affordable....[They are] 'actively looking for something that is different, safe, easy to buy and that will provide them with an opportunity to get more pleasure, excitement, and sensation out of life'" ("Family Cruising," 1995).

## Research Methodology

Research findings were derived from statistical analyses processed from the Las Vegas Visitor Profile Study—1994 databank produced by GLS Research for the Las Vegas Convention & Visitors Authority. The databank contained a random sample of 2,400 Las Vegas adult visitor interviews conducted between July 1, 1993, and June 30, 1994.

Personal, interviewer administered, intercept-type interviews produced the data. Questions concerned attitudes, gambling and non-gambling behavior, and socio-demographics. Data analysis included frequency distributions, measures of central tendency, metric techniques (e.g., ANOVA), and nonparametrics (e.g., Chi-Square).

Prior to January 1, 1994, family visitor statistics were based on the following question: "How many of those people [in the party] are under the age of 21?" The question excluded visitors who did not stay in a hotel or motel during their visit to Las Vegas.

## Casino Gambling Dynamics

Casino gambling is a form of consumer behavior. "Modern society has come to view gambling—and casinos—as an acceptable form of adult entertainment....A larger segment of society now views casinos as a legitimate industry....Gambling has clearly evolved from a sinful activity and vice to a form of entertainment during the second half of the twentieth century" (Eadington, 1994).

Las Vegas is a unique city. Its main industry is casino gambling. Las Vegas, along with casino gambling, has become more acceptable to the general public in the United States. This is because the political, legal, economic, technological, cultural, and social environments have changed. "The city now seems mainstream. But that's only because the rest of America has become a lot more like Vegas.... [Its] retail ceaselessness is no longer singular ....Marriage and divorce laws in the rest of the U.S. have long since caught up with Nevada's pioneering looseness....American show business is today so pervasively Vegas that we hardly notice anymore" (Andersen, 1994).

**The family market is 8 percent of the total Las Vegas adult visitor market. Eighty-eight percent of the family market are gamblers.**

# Casino Gambling Behavior

## Market Segment Sizes

Table 1 indicates the size of the family market and the relative sizes of the Las Vegas gambling and non-gambling market segments. The family market is 8 percent of the total Las Vegas adult visitor market. Eighty-eight percent of the family market are gamblers. Gamblers constitute about 92 percent of the total market. Gamblers without children compose 85 percent of the total market. Non-gamblers with children represent 1 percent of the market.

Table 1. Market Segments

<b>Gambler:</b>	With Children	7%	<b>Non-Gambler:</b>	With Children	1%
	Without Children	<u>85%</u>		Without Children	<u>7%</u>
	Sub-Total	92%		Sub-Total	<u>8%</u>
			<b>Total</b>		100%

The size of the family market has increased 2 percent over the last four years (1991 thru 1994). It increased from 6 percent in 1991 to 7 percent in 1992 to 8 percent in 1993 and 1994 (Las Vegas Visitor Profile Study 1994, [1995]).

## Gamblers with children spent the most for shopping.

Although the family market represents only 8 percent of all adult visitors, it constitutes a significant market segment within the Las Vegas casino gambling market.

It could be considered as a separate business target, or product-market target, composed of several target market segments. One or more of these segments could be selected as target market entries by competitors in the Las Vegas market. The local Las Vegas market, drawn from a population of over 1 million persons, could provide additional family market, target market entries. The non-gambling niche of the family market plus other non-gambling niches in the Las Vegas market could also constitute significant additional target markets.

## Gambling Budgets

Table 2 indicates the average gambling budgets for gamblers traveling with and without children. The gambling budget is the amount set aside for gambling action for the market stay. It is not the gambling handle or the gambling expenditure. The overall average gambling budget for gamblers in Fiscal Year 1994 was \$480.

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**Table 2. Gambling Budgets**

	With Children	Without Children	Overall Average
<b>GAMBLERS</b>	\$296 *	\$504 *	\$480

\* Significant Difference at  $p=.05$

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Gambling budgets varied significantly across gambling market segments. Gamblers traveling without children had a significantly higher budget than gamblers traveling with children (i.e., \$504 vs. \$296).

The average gambling budget for gamblers without children was 70 percent greater than for gamblers with children. The lower gambling budget for gamblers with children could indicate more time spent with children in non-gambling or family activities, or simply different needs and benefits sought related to such variables as different life-styles, stages of family life cycle, or different socio-demographics.

Lower gambling budgets are a perceived threat to the casino gambling industry. The threat will increase as the family market share of market increases relative to the entire Las Vegas market.

## Gambling Behavior

Table 3 indicates that gambling behavior varied across gambling market segments.

The average gambler gambled about 5 hours each day, bet about 3 coins per slot action, and bet about \$13 per wager.

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**Table 3. Gambling Behavior**

Gambling Item	G	GWC	GWOC
Hours Gambled	5.0	4.0 *	5.2 *
Coins per Bet	3.3	3.3	3.5
Average Bet	\$ 13	\$ 9	\$ 14
Keno/Bingo Bet	\$ 3	\$ 1	\$ 3

Note: G=Gambler; GWC=Gambler With Children; GWOC=Gambler Without Children

\* Significant Difference at  $p=.05$

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The gambler without children spent significantly more time (5.2 hours) gambling than the gambler with children (4.0 hours). Coins per bet, the average bet, and the average keno/bingo bet did not vary significantly across segments.

### **Non-Gambling Expenditure Patterns**

Research findings for differences in non-gambling expenditures across the market segments were not statistically significant (due to small sample sizes). However, non-gambling expenditure patterns were in the expected direction.

Table 4 indicates that food and drink and transportation expenditures were relatively stable across the market segments. On the other hand, shopping, entertainment, and sightseeing expenditures varied across segments.

**Table 4. Non-Gambling Expenditure Patterns**

Expenditures	G	GWC	GWOC	NG
Food & Drink	\$23	\$21	\$25	\$24
Transportation	\$14	\$16	\$15	\$16
Shopping	\$76	\$91	\$76	\$59
Entertainment	\$21	\$19	\$25	\$13
Sightseeing	\$ 4	\$ 9	\$ 4	\$ 4
Other	\$ 2	\$ 0	\$ 4	\$ 1

Note: G=Gambler; GWC=Gambler With Children; GWOC=Gambler Without Children; NG=Non-Gambler

Gamblers spent more than non-gamblers for shopping. Gamblers with children spent the most for shopping. Gamblers spent more than non-gamblers for entertainment. Gamblers without children spent the most of all the segments for entertainment.

**Gamblers with children are more likely to be females. Gamblers with children tend to be married, but 21 percent of the gamblers with children are not married.**

### **Travel Behavior**

Table 5 compares the travel behavior of gamblers to non-gamblers and gamblers with children to gamblers without children. Las Vegas gamblers are more likely than non-gamblers to be repeat visitors. Gamblers stay longer than non-gamblers, but they visit less frequently. Gamblers without children, compared to gamblers with children, tend to stay longer, visit more frequently, and visit more gambling locations. Gamblers and gamblers without children are more likely than non-gamblers to visit during January, February, and March.

**Table 5. Travel Behavior**

Travel Item	G	GWC	GWOC	NG
First Visit	22%	19%	20%	28%
Nights Stayed	3.2*	2.9	3.4	2.0*
Days Stayed	4.1*	3.8	4.3	2.9*
Visits Last Year	2.4*	2.4	2.6	3.7*
<b>Season of Visit</b>				
Jan. - Mar.	48%	40%	48%	40%
Apr. - Jun.	52%	60%	52%	60%
Visits Last 5 Yrs	8.7	8.7	9.2	9.9
Visits Oth. Gam. Loc.	6.7	3.4	6.9	3.2

Note: G=Gambler; GWC=Gambler With Children; GWOC=Gambler Without Children; NG=Non-Gambler

\* Significant Difference at p=.05

## Socio-Demographic Profiles

Table 6 depicts a five variable socio-demographic profile across different market segments. Gamblers and non-gamblers, as well as gamblers with children and gamblers without children, differ from one another according to selected socio-demographic variables.

**Table 6. Socio-Demographic Profiles**

Variable	G	GWC	GWOC	NG
<b>Age (Ave.)</b>	48	39	48	43
<50	55% *	85% *	53% *	70% *
50+	45% *	15% *	47% *	30% *
<b>Gender</b>				
Male	49% *	46%	51%	58% *
Female	51% *	54%	49%	42% *
<b>Marital Status</b>				
Married	66% *	79% *	66% *	54% *
Other**	34% *	21% *	34% *	46% *
<b>Ethnicity</b>				
White	79%	58% *	82% *	83%
Minority***	21%	42% *	18% *	17%
<b>Income</b>				
<\$50,000	58% *	53%	59%	47% *
\$50,000+	42% *	47%	41%	53% *

Note: G=Gambler; GWC=Gambler With Children; GWOC=Gambler Without Children; NG=Non-Gambler

\* Significant Difference at p=.05

\*\* Other=Single, Separated, Divorced, and Widowed

\*\*\* Minority=Black, Asian, and Latino



Although 55 percent of all the gamblers, and 85 percent of the gamblers with children, are under age 50, gamblers tend to be older than non-gamblers. As expected, gamblers without children tend to be older than gamblers with children. There is a higher proportion of female gamblers than male gamblers.

Gamblers with children are more likely to be females. There is a higher proportion of male non-gamblers than female non-gamblers. Gamblers with children tend to be married, but 21 percent of the gamblers with children are not married. Gamblers and non-gamblers tend to be from the White ethnic group. However, 42 percent of the gamblers with children are from minority groups. Gamblers tend to have lower incomes than non-gamblers. Gamblers with children tend to have higher incomes than gamblers without children.

### Other Socio-Demographic Profiles

Gamblers, compared to non-gamblers, are more likely to be retired. For example, 29 percent of the visiting gamblers are retired. Gamblers without children are the most likely of all the market segments to be retired. Thirty-four percent of the gamblers without children are retired.

Gamblers with children, compared to gamblers without children, are more likely to be employed. Non-gamblers are more likely than gamblers to be college graduates, from foreign countries, and from the West in the United States. Gamblers with children are more likely than gamblers without children to be from the West, and from Southern California in particular.

Table 7 indicates the specific proportions of employment, education, and geographic variables across the different gambling and non-gambling market segments.

**Table 7. Other Socio-Demographic Profiles**

Variable	G	G W C	G W O C	NG
		<b>Employment</b>		
Employed	71% *	97% *	66% *	86% *
Retired	29% *	3% *	34% *	14% *
<b>Occupation</b>				
Prof.	52%	67%	55%	55% *
Clerical	48%	33%	45%	45% *
<b>Education</b>				
H.S. or <	53% *	57%	54%	36% *
Col. Grad	47% *	43%	46%	64% *
<b>Country</b>				
USA	86% *	91%	87%	79%
Foreign	14% *	9%	13%	21% *
<b>USA Region</b>				
West	58% *	87% *	55% *	73% *
Other	42% *	13% *	45% *	27% *
<b>So. Ca.</b>				
Other	35%	51% *	33% *	34%
	65%	49% *	67% *	66%

Note: G=Gambler, GWC=Gambler With Children, GWOC=Gambler Without Children, NG=Non-Gambler

\* Significant Difference at p=.05

## **Profile of the Family Gambler**

The family gambler (i.e., the gambler with children) has a per trip gambling budget of about \$300 and spends about \$90 per trip for shopping and about \$20 per day for food. She (54%) or he (46%) gambles about 4 hours per day, stays about 4 days, and visits Las Vegas about 2.5 times a year.

The family gambler is about 39 years old, married, White, and employed. This gambler earns less than \$50,000 per year, has a high school or less education, is from the Western Region of the United States, and represents about 7 percent of the Las Vegas casino gambling market.

## **Profile of the Gambler Without Children**

The gambler without children (i.e., the person visiting Las Vegas is not accompanied by any children) has a per trip gambling budget of about \$500 and spends about \$76 per trip for shopping and about \$25 per day for food. He (51%) or she (49%) gambles about 5 hours per day, stays about 4 days, and visits Las Vegas about 2.5 times a year.

The gambler without children is about 48 years old, married, and White. This gambler is employed, earns less than \$50,000 per year, has a high school or less education, and is not from the Western Region of the United States.

Only 48% of all gamblers without children come from the Western Region of the United States. More than half of the gamblers without children segment of the market come from other areas of the United States or from foreign countries. The gambler without children represents about 85 percent of the Las Vegas casino market.

## **Similarities and Differences between Gamblers With and Without Children**

Gamblers with children and gamblers without children are similar with respect to length of stay, number of visits per year, marital status, ethnic group, employment status, earnings per year, and education. Gamblers with children, compared to gamblers without children, are more likely to be female (about 8% more), to have a lower gambling budget (about \$200 less), to gamble less (about 1 hour per day less), to spend more for shopping (about \$14 more), to spend less for food (about \$5 less), to be younger (about 9 years younger), to come from the Western Region of the United States (about 30% more), and to represent a smaller proportion of the overall casino gambling market (about 78% less).

## **The Non-Gambler Profile**

The non-gambler does not have gambling expenditures, but spends about \$60 per trip for shopping and about \$25 per day for food. He (58%) or she (42%) stays about 3 days, and visits Las Vegas about 4 times a year.

The non-gambler is about 43 years old, married, and White. This non-gambling visitor is employed, earns more than \$50,000 per year, is a college graduate, is from the Western Region (about 57%) of the United States, and represents about 8 percent of the Las Vegas casino gambling (i.e., visitor) market. Non-gamblers with children represent about 1 percent of the Las Vegas casino gambling market (i.e., about 12 percent of the non-gamblers are visiting with children).

## **Similarities and Differences between Non-Gambler and Gambler Profiles**

Non-gamblers and gamblers are similar regarding marital status, ethnic group, employment status, and food expenditures. It should be noted that these are mostly profile (majority percentage-based) comparisons. In certain cases (such as marital status) there are significant differences across the major sub-groups.

Non-gamblers compared to gamblers are more likely to stay fewer days (about 1 day less), to make more visits per year (about 1.5 more visits), to be male (9% more), to spend less for shopping (about \$15 less), to be younger (about 5 years younger), to be college graduates (about 17% more), to earn \$50,000 or more (about 10% more),

**Gamblers with children and gamblers without children are similar with respect to length of stay, number of visits per year, marital status, ethnic group, employment status, earnings per year, and education.**

to come from the Western Region of the United States (about 8% more), to represent a smaller proportion of the overall casino gambling market (about 84% less), and to represent a smaller proportion of the overall family market (about 6% less).

## **The Nature Of The Family Market**

The family-oriented gambler market is heterogeneous. Its members range from relatively young, financially secure grandparents taking a trip with a grandchild to a financially insecure single mother traveling with her children. A casual observation of activities in a hotel-casino (e.g., Treasure Island) reveals a significant variety of children and adult combinations. These family-oriented groups engage in a multitude of activities (e.g., eating, swimming, shopping, video arcade machines, amusements, rides, shows, entertainment programs, and visiting friends and relatives).

It seems that members of the family market enjoy traveling with children. In some cases they don't have a choice (e.g., baby-sitter not available). They also enjoy gambling. A trip to Las Vegas is seen as combining quality time with the

children and also something special (e.g., gambling) for the adults. Parents schedule time for the children and time for themselves. This is an extension of the normal work-home routine. The children are not expected to participate in everything (e.g., adult shows). They don't at home. Some things are organized specifically for them (e.g., water activities at Wet 'N Wild).

## The Family Market Potential

The family market potential is substantial and growing. About 82 percent of all United States households believe that "casino gaming can be a fun night out." About 59 percent believe that "casino gaming is perfectly acceptable for anyone." About 30 percent visited a casino in 1994. It should be noted that the estimated number of households is based on a conservative estimate of the number of households in the USA in 1994 (extrapolating from the Bureau of the Census Series B estimates). A household base of 107 million households indicates that about 32 million households visited a casino in 1994 (Harrah's Survey of Casino Entertainment, 1995).

Table 8 indicates the estimated number of family households, the households with children under 18, and the market potential for family-oriented gamblers from 1994 through the year 2000. For example, the market potential for family gamblers in 1994 is about 20 million households. This increases to 21 million households by the year 2000.

**Table 8. The Family Market Potential**

Variable	1994	1997	2000
# USA Households	96m	100m	106m
% Family Households	70%	69%	68%
# Family Households	67m	69m	72m
% HH's W Child. <18	50%	50%	50%
# HH's W Child. <18	34m	35m	36m
% Gamb. Acceptance	59%	59%	59%
# HH's Mkt potential	19.8m	20.4m	21.3m

Sources: Bureau of the Census, *Demographics USA—County Edition*, Survey of Buying Power, and Harrah's Survey of Casino Entertainment.

These estimates of national market potential are conservative because they are based only on the households that accept casino gambling (as compared to those who see casino gambling as a fun night out), and they do not include families with children aged 18, 19, and 20. Furthermore, the gambling acceptance rate is expected to increase significantly each year. It increased 16 percent from 1993 to

1994. The exposure rate is also expected to increase significantly each year. It increased by 36 percent from 1993 to 1994.

Further support for the use of the gambling acceptance figure of 59 percent to determine market potential comes from the Gambling Research Group (Social Science Research Center, Mississippi State University) study of adult gambling behavior where it was found that 61 percent of American adults legally gambled in 1994 ("Sixty-one Percent of Adults," 1995). If a household is engaged in any kind of gambling, it is assumed that it has accepted gambling as appropriate behavior, that it would also accept casino gambling as appropriate, and that it would participate in casino gambling if the situation were appropriate (e.g., resources available, convenient casino, and attractive marketing program).

It could be argued that the 82 percent—believing that casino gaming can be a fun night out—household base is an appropriate estimator of casino market potential. This would produce a 1994 national market potential of about 28 million households and a Las Vegas national penetration ratio of about 1.3 percent.

### **The National Family Market Penetration Ratios**

Table 9 indicates national family market penetration ratios across time. Assuming that about 86 percent of the Las Vegas visitors are domestic visitors, that about 7 percent of the Las Vegas domestic casino gambling market are gambling oriented families, that each family consists of about two adults, and that these gambling prone families visit Las Vegas an average of about 2.4 times each year, the current Las Vegas market family penetration ratio is only about 2 percent. This will rise about one-half percent to about 2.5 percent by the year 2000.

**Table 9. The National Family Market Penetration Ratios**

Variable	1994	1997	2000
# Las Vegas Visitors	28.2m	34m	40m
% Domestic Visitors	86%	86%	86%
# Domestic Visitors	24m	29m	34m
# Vis. Ave. Party/Mode	2	2	2
# Las Vegas Vis. HH's	12m	15m	17m
% Gamblers With Child.	7%	7%	7%
# Gam. W. Child. HH's	849k	1.0m	1.2m
# Visits Per Yr/GWC	2.4	2.4	2.4
# Different GWC HH's	354k	426k	502k
% Penetration Ratio	1.8%	2.1%	2.4%

Sources: Las Vegas Visitor Profile Study.

The family gambler penetration ratio of 2 percent (1994) can be compared to the overall product market penetration ratio of 10 percent (1993). This would indicate a 5:1 greater penetration rate of gamblers without children compared to gamblers with children. Gamblers without children are expected to continue to dominate the market, but by 1997, and more by the year 2000, the difference between the ratios of the two groups will decline significantly (Dandurand & Pinney, 1994).

The family market is expected to increase significantly through the year 2000. The increase will derive from overall growth in the Las Vegas casino gambling market and from larger market proportions of the family market. The fundamental driving forces are cultural, political, legal, economic, competitive, and technological change.

The Las Vegas casino gambling industry's response to the dynamics of the evolving business environment is depicted in Circus Circus Enterprises' Project Millennium which "could encompass a series of new multiple hotel/casino environments, each uniquely themed, yet interconnected to create a stunning entertainment complex. The experience will be one truly free of automobiles, traffic snarls, stress and congestion....The project will encompass diversions and opportunities for entire families and non-gamblers, but the central objective will be to energize the casinos, and so we will be primarily seeking to create adult-oriented attractions....Guests will have ample options to fill their stay without ever leaving our properties and still have reason to come again because they will not be able to see it all in one stay" (Circus Circus, 1995).

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