METHODOLOGY STATEMENT & EXECUTIVE SUMMARY

**TO:** ELIZABETH FRETWELL, CITY OF LAS VEGAS

**FROM:** JASON GRAY, STRATEGIC SURVEYS

AMANDA DEAN, STRATEGIC SURVEYS

**SUBJECT:** HISTORIC DOWNTOWN POST OFFICE/FEDERAL COURTHOUSE REDEVELOPMENT CONCEPT RESEARCH

**DATE:** 4/13/2006

## I. Introduction

Strategic Surveys has prepared the following report as a summary of salient findings derived from a two part survey of Las Vegas Valley resident and visitors. This report will provide a comprehensive review of research data in the context of community and visitor sentiment as it relates to the redevelopment/rehabilitation of the historic downtown post office/courthouse building located at the intersection of Third Street and Stewart Avenue. Moreover, the report will highlight resident and visitor perception as it relates to various redevelopment concepts and amenities, cultural and educational considerations, and behavioral dispositions.

## II. Research Engagement

Strategic Surveys was commissioned by the City of Las Vegas to gauge whether there is sufficient demand among Las Vegas Valley residents and visitors to initiate a rehabilitation project altering Las Vegas' historic downtown post office/ courthouse into a cultural center themed around various historical events that collectively define the Las Vegas experience. The research provided in this report will highlight the feasibility of the rehabilitation project in terms community/visitor perception and concept amenability. Throughout this report the reader will find quantitative data that speak to the following substantive inquiries:

- How strong is the desire among potential patrons to see the proposed rehabilitation project completed at the historic post office/courthouse site?
- Who are the target audiences and which market segments can attract be attracted to the proposed museum/cultural center?
- Would area tourists visit the facility?
- At what cost of time and under which travel arrangements are they most likely to patronize the facility?
- Would potential museum visitors take interest in a "Culture Shuttle" beginning at the proposed museum/cultural center?
- Which amenities (Observation Deck, Specific Exhibits, Food Service, Picnic Areas, Banquet Halls, etc) would potential visitors be likely to access?

## III. Survey Methodology

### a. Telephone Survey of urban Clark County Residents:

**Logistical Details:**
The survey of Las Vegas Valley residents was conducted at Strategic Surveys' survey research facility during the afternoon and evening hours of March9-16, 2006. Interviewers called respondents from a representative sample of unincorporated C lark County, City of Las Vegas, City of North Las Vegas, City of Boulder City, and City of Mesquite residents. A stratified random sampling method was implemented or administration of the survey and respondent records were drawn to reflect urban Clark County's jurisdictional and municipal composition.

Survey administrators entered data directly into In2Quest for computer assisted telephone interviewing (CATI) database software. The average duration per completed response was fourteen minutes and twenty-three seconds. Surveys were conducted in English and, when necessary, in Spanish. Survey administrators attempted to reach each selected contact four times before moving on to the next corresponding record in the sample.

**Sampling Procedure:**
The resident sample was compiled using geo-coding technology which generated contact information (including name, address and telephone number) for owner and renter-occupied residential units in urban Clark County. Data sources included telephone directories, real estate filings, census data, voter registration files, utility, warranty, and other transactional information.

A total of 600 resident surveys were procured in support of this study. The sample was carefully drawn to reflect general population trends within urban Clark County, Nevada. Respondents were randomly selected according to the following screening criteria:

- Alternate male/female eighteen years of age or older with next birthday in contacted household.

### b. Intercept Survey of Las Vegas Visitors:

**Logistical Details:**
Strategic Surveys implemented a stratified random sampling method for administering of the visitor intercept surveys (face-to-face interviews) Strategic Surveys procured 300 total Las Vegas visitor surveys, equally stratified among visitors in along the Las Vegas Blvd. "Strip" and Downtown Las Vegas corridors. Interviews in the downtown area were administered primarily on Freemont Street.

Strategic Surveys' staff of professionally-trained interviewers administered the visitor intercept surveys during the afternoon and evening hours of March 11-16,

2006. Field supervisors reviewed, checked for accuracy, and authorized every completed survey in order to mitigate administration error. Additionally, each completed survey was assigned a unique code, date/location of administration and interviewer and supervisor initials to ensure duplication did not occur. Each visitor intercept survey respondent was given a commemorative City of Las Vegas gambling chip (no monetary value) and an incentive for participating in the study.

**Sampling Procedure:**

All visitor intercept survey respondents were asked to identify themselves as a Las Vegas visitor prior to administration of the survey. Moreover, each visitor was asked provide their city and state (country if outside the U.S.) of residence to qualify for visitor intercept survey participation. Intercept interviewers administered the survey at consistent intervals and locations for the duration of the study:

**Data Collection**
March 11-March 16

| **Downtown Las Vegas** | **Las Vegas Strip** |
|---|---|
| 3 Shifts: 4 Hours/ea. | 3 Shifts: 4 Hours/ea. |
| (50 Surveys/ea.) | (50 Surveys/ea.) |
| Saturday (03/11) 12PM-4PM | Sunday (03/12) 12PM-4PM |
| Monday (03/13) 10AM-2PM | Tuesday (03/14) 5PM-9PM |
| Wednesday (03/15) 5PM-9PM | Thursday (03/16) 10AM-2PM |

**c. Survey Instruments:**

The survey instruments were constructed in consultation with representatives from Strategic Surveys and the City of Las Vegas. Both the telephone survey of local residents and the visitor intercept survey instruments consisted of 25 measurement variables including demographics. The instruments were composed primarily of scale and ordinal level variables. Respondents for both surveys were initially asked a series of questions to ascertain their visitation of historical/cultural sites throughout the Las Vegas valley. Respondents were then prompted to communicate their amenability to a series of potential museum concepts that may be applied to the historic downtown post office/courthouse redevelopment project. In terms of the visitor intercept survey, these questions were followed by queries regarding leisure activities and spending habits. In depth probing of support for redevelopment of the historic downtown post office/courthouse among local residents followed the initial series of behavioral variables. Additional questions, such as a query of interest with regard to the culture and nostalgia of Las Vegas were

also asked of survey respondents. The survey instruments concluded with a series of demographic variables, including household income and employment status, to delineate survey data among identifiable subgroups.

### d. Error Measurement:

Surveys take into account the opinions of a sample frame of the universe, or study population and are generalized to reflect the same trends in the study population as a whole. For the purpose of this study, the universe consists of two distinct study populations: urban Clark County residents and Las Vegas Valley visitors. There is always a possibility that the sample frame will not reflect the actual opinions of the study population as a whole. A scientifically sound sample size relative to the study population is one of the most common ways to mitigate this type of error. For instance, if the entire study population consisted of 1000 units, researchers express confidence that greater accuracy is observed by studying 100 units than by studying 10 units. Error is applied in terms of levels of confidence. The 95% level of confidence is standard in social research. A 95% level of indicates that if we were to draw the same number of units from the same sample frame 100 times, 95 samples would yield a result within a given range or margin of error. A sample size of 600 for the urban Clark County resident survey is associated with a 95% level of confidence that the opinions of our sample will fall within 4% above or below the actual population value. A sample size of 300 in the case of the Las Vegas Valley intercept is correspondingly associated with a 6% margin of error at the 95% level of confidence.

### e. Interpreting the Data:

The reader will find that data in this report are presented, for the greater portion of analysis, using three measurement tools:

- Frequency (top-line) tables
- Measure of Central Tendency (Mean, Median, and Mode)
- Cross Tabulations

Frequencies offer a count and corresponding valid percentage of response values for a particular variable. Frequencies can be presented in tables, charts, or graphs. The frequency tables are labeled with the variable name, count, and valid percentage for responses in each category. The data represent the number of respondents out of the total sample who answered affirmatively to a particular response value for a given variable. The reader will find that the total count will not add up to 609 for all variables. Such instances denote additional probing questions that follow a strict logic sequence, or the re-routing of respondents for whom the question does not logically apply. The valid percentage, however, will always total 100% (when rounded).

Three measures of central tendency allow readers to examine general trends in the data. The mode demonstrates the response value reported most frequently. This can

be applied to any level of analysis from categorical variables to variables of scale measurement. Medians can be used to determine where the 50th percentile score falls within a response value regime. Fifty percent of responses fall above the median, and fifty percent will fall below the median. The mean represents the numerical average of all responses values to a particular variable.

Cross tabulations allow the reader to interpret one variable in the context of another. The variable on the vertical axis is considered to be the independent variable. In other words, the vertical variable influences the variable assigned to the horizontal axis, or the dependent variable. The independent variable is typically descriptive or demographic in nature.

Cross-tabulation tables are presented with percentages across rows to allow the reader a better understanding of how each category of the independent (demographic) variable influences the dependent variable. Percentages across rows should always add to 100% (rounded). There is limited utility in summing column percentages vertically.

### f. Rounding Procedures & Weighting:

Statistical Package for the Social Sciences (SPSS) software can calculate to any number of decimal places. For purposes of this report, presentation values have been rounded to the first decimal place using standard rounding conventions. Any value that is less than .05 is rounded down, and any value greater than .05 is rounded up. For example, 0.14 is rounded down to 0.1, while 0.15 is rounded up to 0.2. The urban Clark County resident Survey results have been post weighted to reflect general Clark County population trends. The final weighting procedure qualified for the observed age and gender delineations.

## IV. Summary of Salient Findings:

### A. Museum Concepts

When asked to rank potential museum concepts, a "vintage Vegas" museum theme was ranked as most interesting by the largest number of both Las Vegas visitors (26.7%) and residents (31.6%). The "Vintage Vegas" concept was ranked in the top three most frequently for area residents (54.3%), however visitors were more likely to cite a "Mob" museum in their top three museum concepts (71%).

**Figure 1. Number one rankings for potential museum concepts**

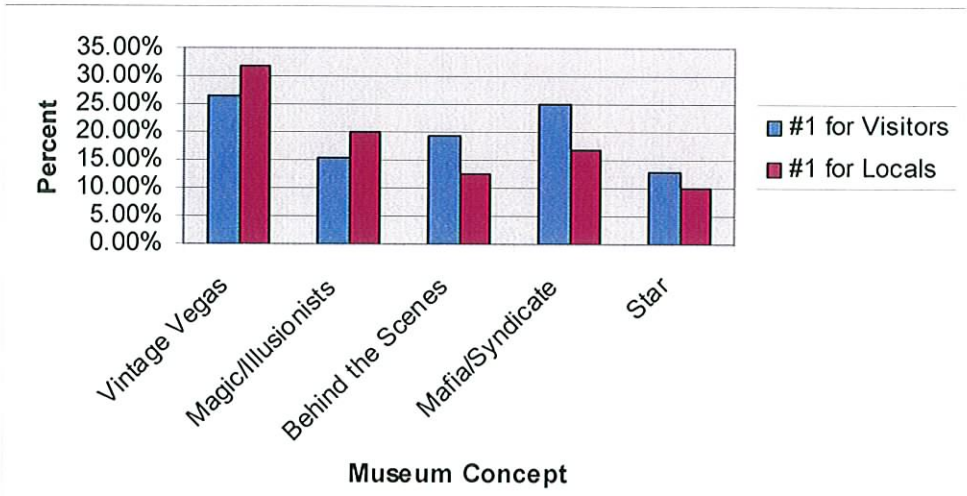
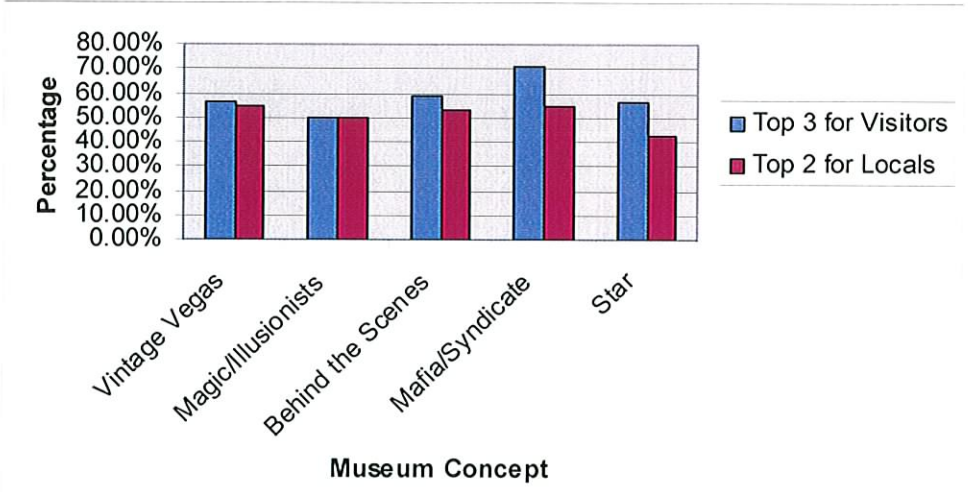



**Figure 2. Top three museum concept rankings**




Respondents were subsequently asked how much they would be willing to pay for a ticket to their first choice of museum concepts. Las Vegas visitors were willing to pay more for a ticket to the museum with the largest cohort (31.7%) falling in the $10-$14.99 range. The most frequently (35.2%) reported ticket pricing range for local residents was $5-$9.99.

Las Vegas visitors were resoundingly in favor of an organized crime themed museum with 57.0% indicating they would "definitely" go to such a facility if it existed in Las Vegas and 23.3% reporting they would "probably" visit this type of museum. The results were mixed for "good guys" and "bad guys." The majority of visitors (52.3%) indicated they were more interested in the criminal element of organized crime, rather than the crime fighters. Conversely, local residents showed a slight preference for the crime fighters (33.9% compared to 30.5%) over criminals.

**Figure 3. Respondent preference between criminal and crime fighter aspects of organized crime**

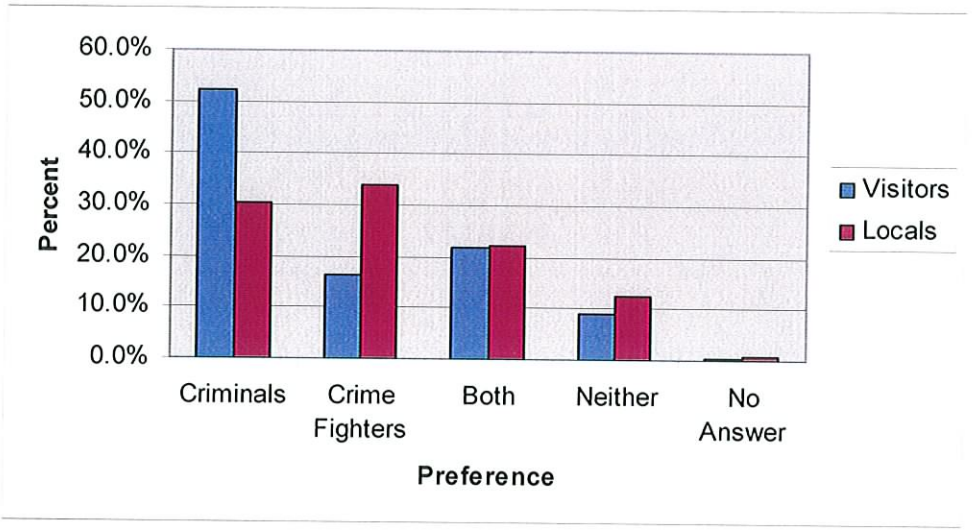
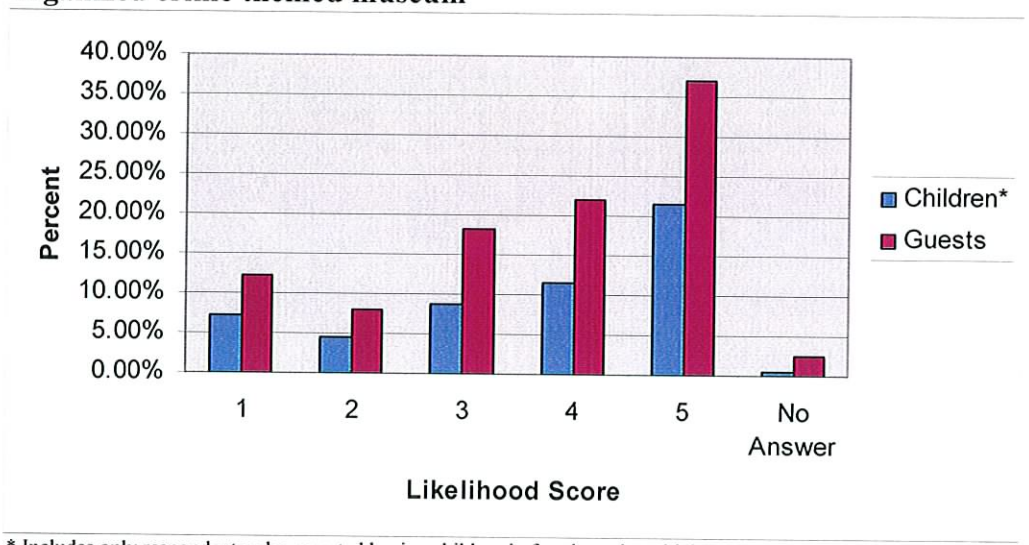



**Figure 4. Likelihood of local residents to bring children or out-of-town guests to an organized crime themed museum**




* Includes only respondents who reported having children in fourth grade or higher.

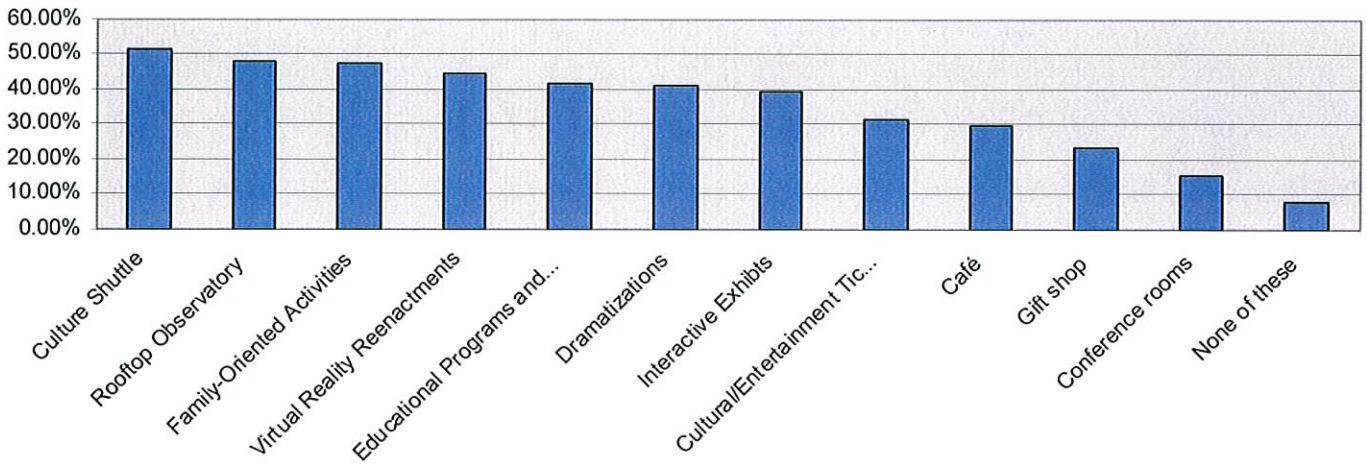
Local residents were asked follow up questions regarding the organized crime museum concept. On a scale of one to five (one is low) the average score for interest in taking a child (fourth grade or higher) to an educational organized crime museum was 3.66, though five was the most commonly reported response (21.4%). The same scale was employed to measure the likelihood of taking out of town guests to visit an organized crime museum. In this case, the mean score was 3.27 and the most commonly reported response was again a score of five (34.4%).

When asked if they would prefer to take their children (fourth grade or higher) to a facility focusing on the history and development of Las Vegas' neighborhoods and communities

versus the organized crime themed museum, more respondents with children (41.6%) preferred the former. Slightly more than one of four (28.9%) respondents with children indicated they'd be more likely to take their children to an organized crime themed facility.

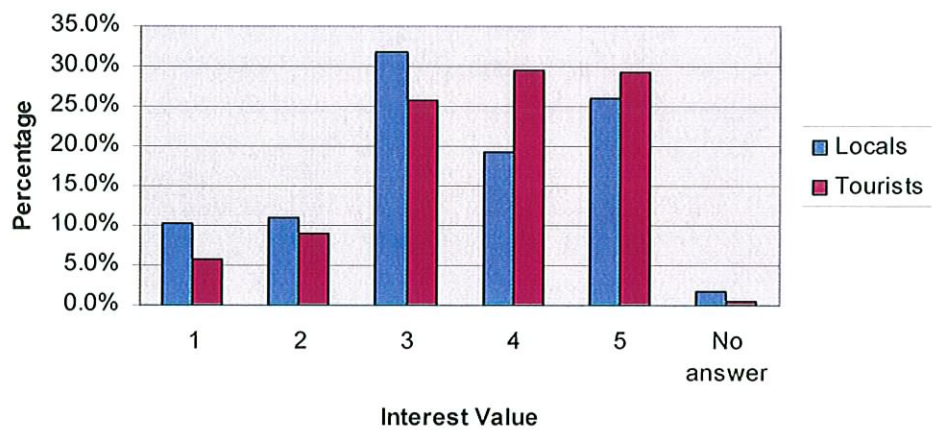
In terms of amenities, local residents (51%) ranked an "a culture shuttle bus that visits Las Vegas' cultural and historical sites" as the most enticing of potential amenities. When asked to rank their interest in participating in a cultural shuttle on a scale of one to five (one is low), the average response was 3.47, with a value of five reported most commonly (34.3%). Visitors also reported a "culture shuttle" interest value of five most commonly (34.4%) with an average score of 3.27.

**Figure 5. Amenity preferences among local respondents**




Both locals and visitors were asked to rate, on a scale of one to five (one is low), their level of interest in the history and culture of Las Vegas. Locals responded slightly higher (mean: 3.68) than visitors (mean: 3.47). Visitors most commonly (26%) reported an interest value of five, while the most frequent response among area locals (29.5%) was four.

**Figure 6. Interest in the history and culture of Las Vegas**



## B. Visitorship Trends

In terms of prior visitorship, the Boulder City/Hoover Dam museum was reported as most commonly visited by both local residents (65%) and tourists (34.33%). Local residents (42.7%) were more likely than visiting respondents (15.7%) to indicate that they had visited a cultural facility or event more than once.

**Figure 7. Facility/event attendance among residents**

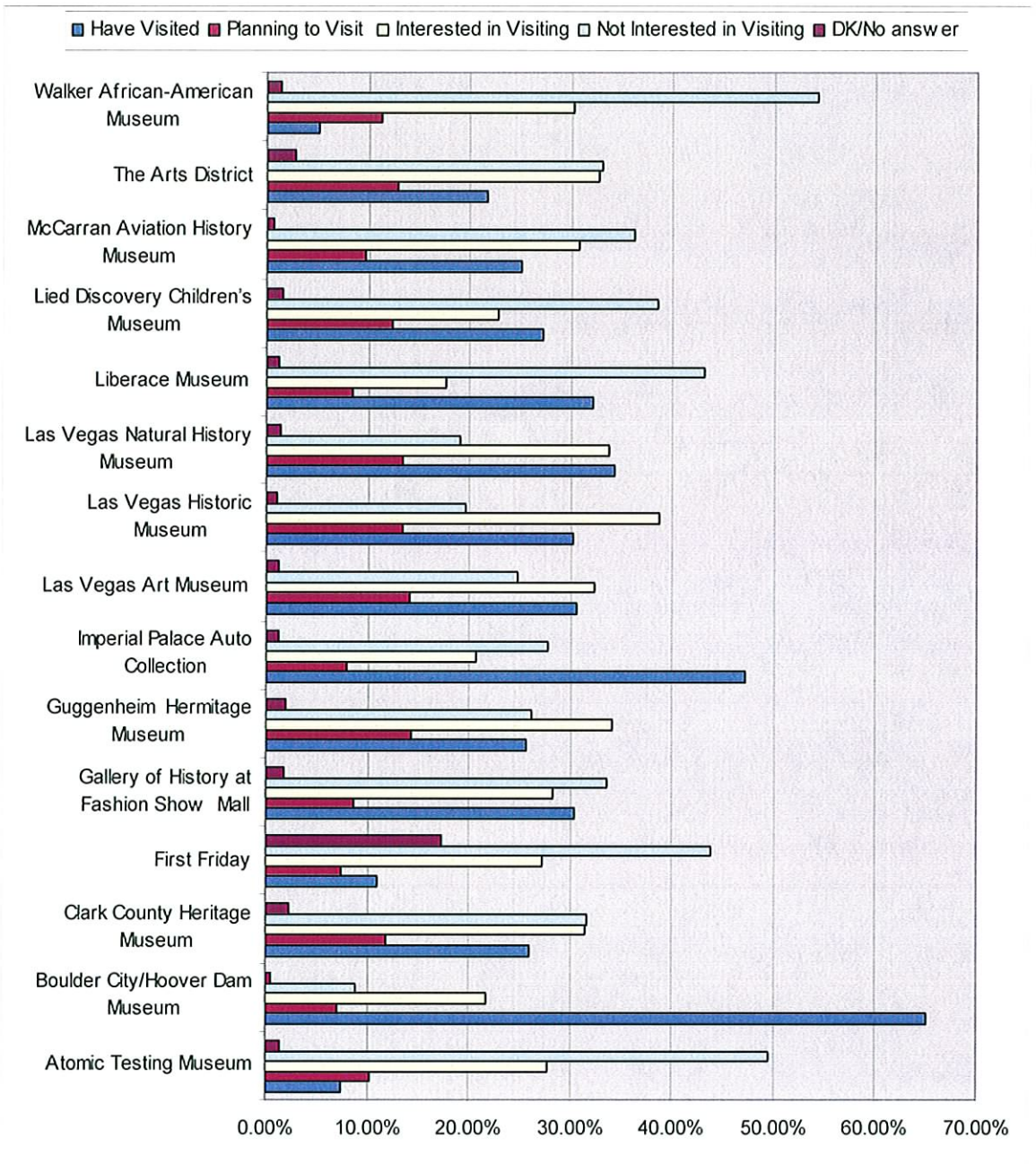
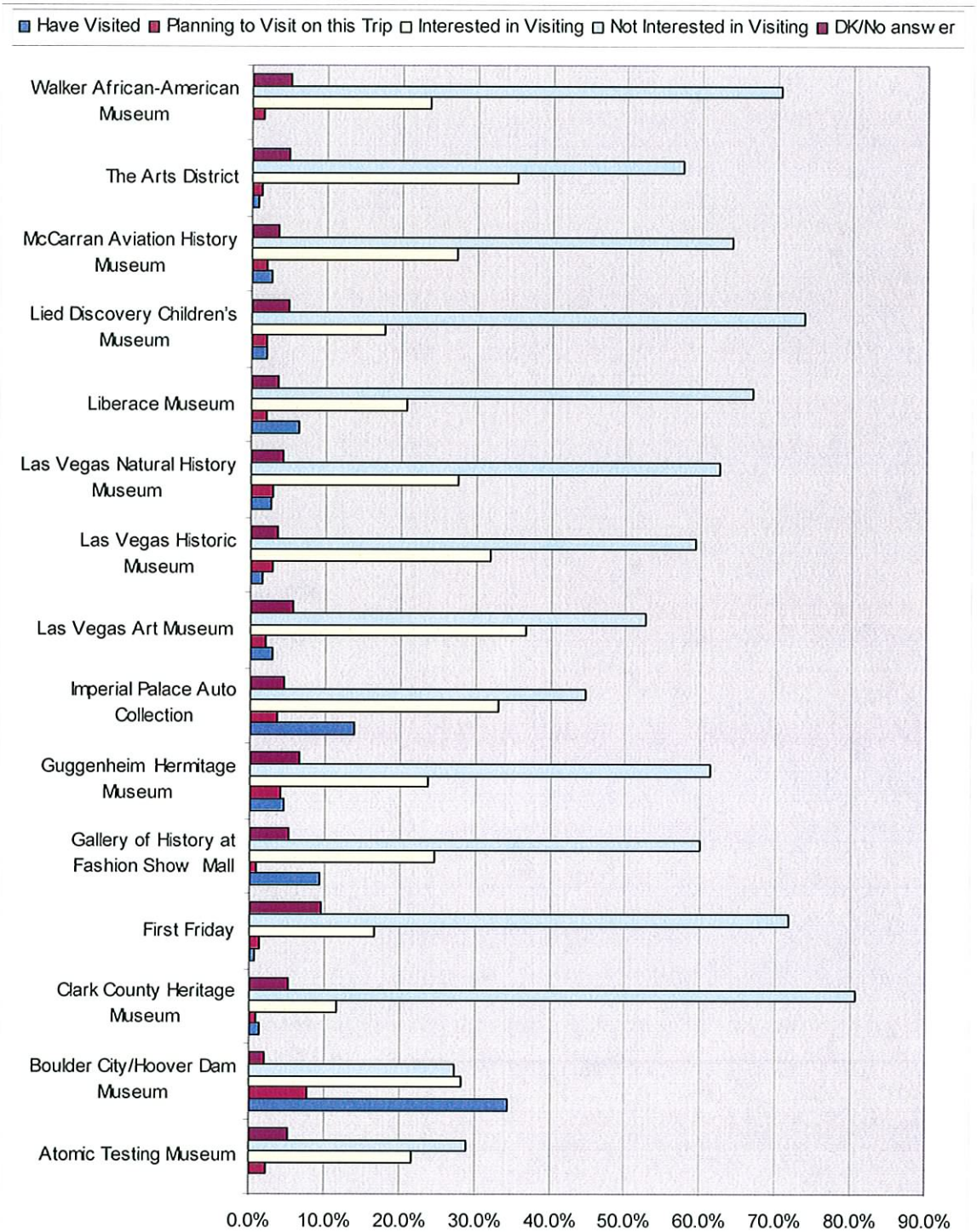


**Figure 8. Facility/event attendance among visitors**

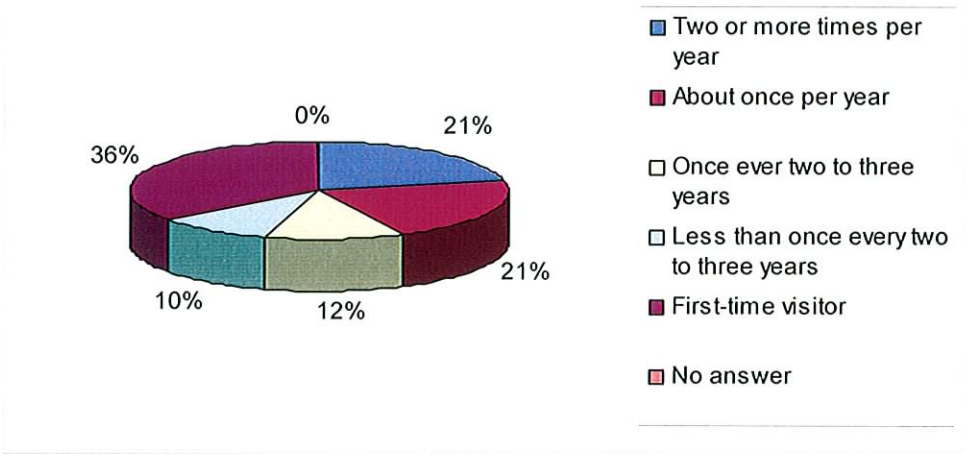



Visitors to Las Vegas were questioned regarding visitation to tourist-oriented areas inside and around Las Vegas. Most visiting respondents indicated they would be visiting "the

Strip" (94.3%) and the downtown/Freemont street area (82.3%). Approximately one third of visitors (32.7%) reported either having visited or intending to visit Hoover Dam during their stay.

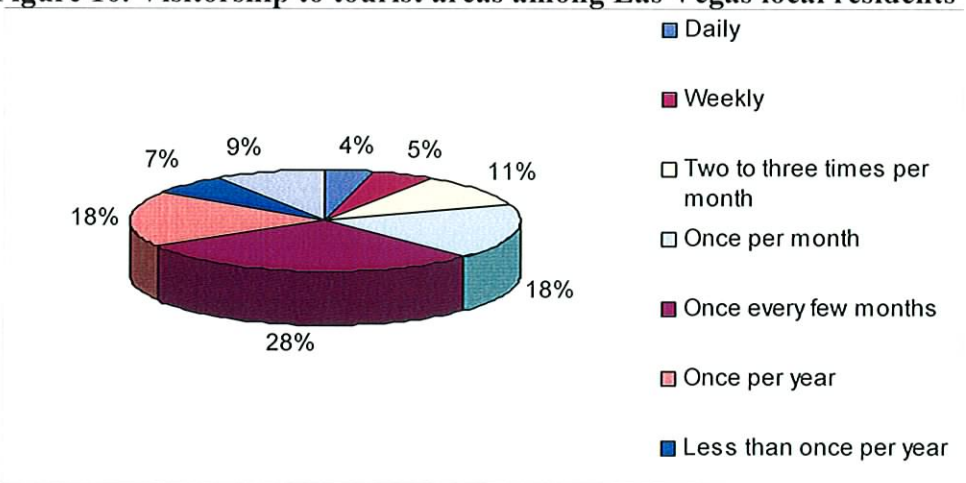
In terms of frequency of visitation, thirty-five percent of visitors indicated they were on their first trip to Las Vegas. Two-fifths of visiting respondents (42.7%) indicated they visit the Las Vegas area at least once per year. A third of visitors (33.7%) indicated they were traveling in groups of three to five, and a similar figure (32.7%) reported they were traveling with a single companion. Ten percent of visiting respondents indicated they were traveling with children under the age of 18. Furthermore, visitors reported stays from one to thirty days, with an average visit of 4.8 days.

**Figure 9. Visitorship frequency among Las Vegas tourists**



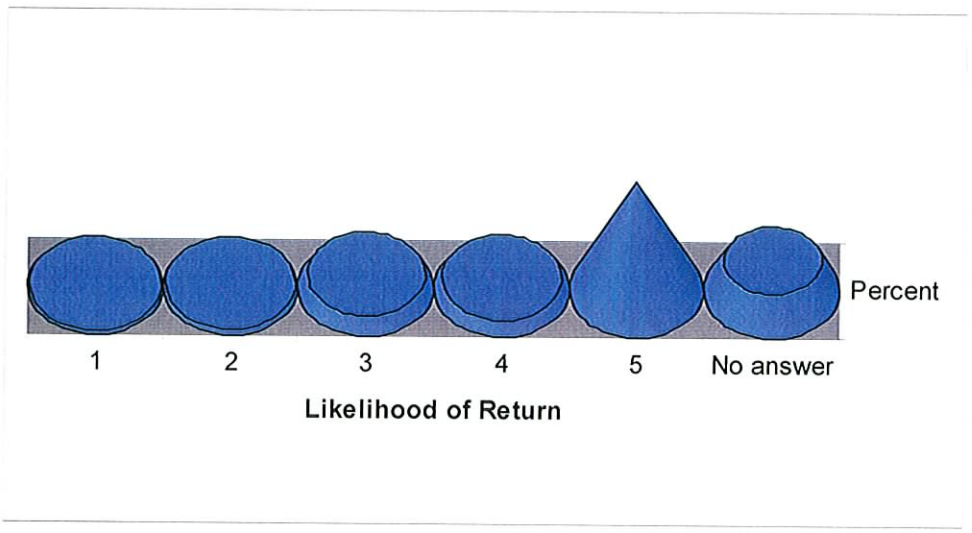

Similarly, area residents were asked how frequently they visit tourist corridors ("the Strip" and "Fremont Street"). The largest cohort (28.7%) reported they visit these areas about once every month. Less than ten percent indicated they never go to these areas.

**Figure 10. Visitorship to tourist areas among Las Vegas local residents**



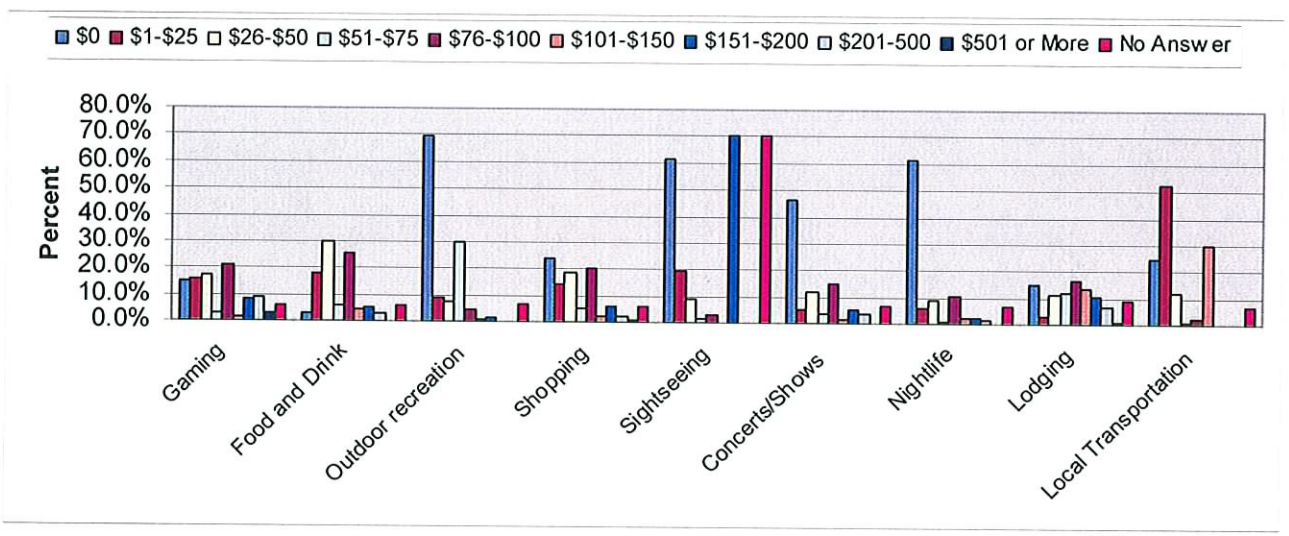
Visitors were asked to rate, on a scale of one to five (one is low) the likelihood of a return trip to Las Vegas. An overwhelming majority of respondents gave a response of five, the highest level of likelihood they return to Las Vegas for another visit. A total of four percent of visitors gave a value of one or two- they were unlikely to return.

**Figure 11. Likelihood of a return trip among Las Vegas visitors**




When visitors were asked to report their daily expenditures in a series of categories, "gaming" had the highest reported mean ($126.43/day), followed by lodging ($111.17).

**Figure 12. Daily expenditures by category**



## C. Demographics

In order to delineate opinion and preferences among subgroups, several demographic measures were collected. Table one demonstrates comparable demographic characteristics for the local telephone and visitor intercept survey samples. The majority of locals who were interviewed via telephone (72.2%) had lived in Las Vegas more than five years.

**Table 1. Demographic Characteristics of the sample.**

| | Locals | Visitors |
|---|---|---|
| *Age* | | |
| 18-24 | 8.8% | 19.3% |
| 25-34 | 15.6% | 22.0% |
| 35-44 | 19.9% | 22.0% |
| 45-54 | 19.9% | 18.7% |
| 55-64 | 17.7% | 12.0% |
| 65 and Older | 18.2% | 3.0% |
| No Answer | | 3.0% |
| *Race* | | |
| White/Caucasian | 68.8% | 76.3% |
| Black/African American | 10.8% | 7.3% |
| Native American | 1.6% | 30.0% |
| Hispanic | 13.7% | 6.0% |
| Asian | 1.8% | 30.0% |
| Pacific Islander | 1.6% | 40.0% |
| Middle Eastern | 0.5% | |
| Mixed Race | 0.3% | |
| No Answer | 1.1% | 9.0% |
| *Annual Income* | | |
| Less than $25,000 | 12.0% | 13.0% |
| $25,000-$34,999 | 17.5% | 8.3% |
| $35,000-$49,999 | 17.9% | 14.7% |
| $50,000-$74,999 | 18.1% | 17.7% |
| $75,000-$99,999 | 12.8% | 13.0% |
| $100,000 or More | 10.1% | 15.0% |
| No Answer | 11.6% | 18.3% |
| *Gender* | | |
| Male | 47.3% | 53.7% |
| Female | 52.7% | 46.3% |

###