

WHEN GAMING GROWS, AMERICA GAINS

How Gaming Benefits America



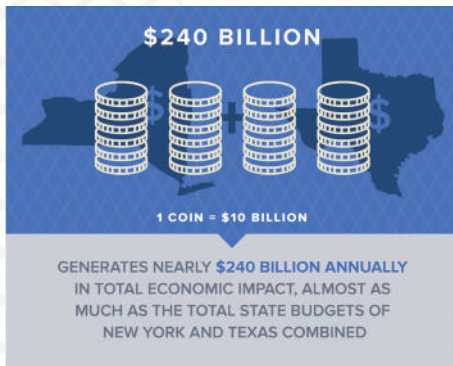
AMERICAN GAMING
ASSOCIATION



GET TO KNOW
GAMING

GAMING BY THE NUMBERS

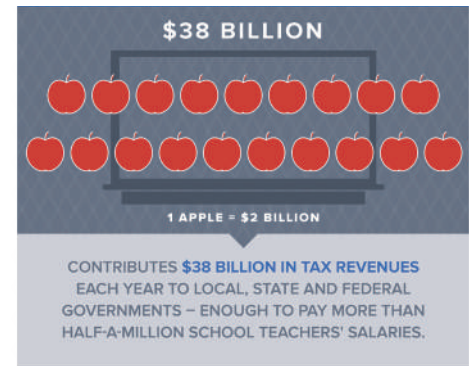
ECONOMIC IMPACT



JOBS



TAX REVENUES



Gaming is a strong economic engine, provides good jobs, pays for vital public services and boosts local communities.

In the first-ever study to analyze data from three varied sectors of the industry — U.S. commercial casinos, tribal casinos and gaming equipment manufacturers — Oxford Economics presents the most comprehensive assessment undertaken of the U.S. gaming industry's economic contribution. The study was released by the American Gaming Association as part of its Get to Know Gaming campaign.

American voters value the casinos in their communities. A 2014 survey by respected pollsters Mark Mellman of The Mellman Group and Glen Bolger of Public Opinion Strategies shows more than 70 percent of voters believe casinos promote job creation. American voters believe casinos improve their communities and help local economies. Nearly six-in-ten voters surveyed say casinos help the economies where they are located. Oxford's study reveals the benefits that explain this growing appreciation.

A Shot in the Arm for the U.S. Economy

The overwhelming majority of American voters, some 74 percent, believe casinos create jobs and strengthen local communities.

These voters believe what Oxford Economics has proved. They found that the gaming industry:

- Generates nearly \$240 billion annually in total economic impact, enough to fund the entire budgets of two mega-states – New York and Texas.
- Supports more than 1.7 million American jobs – larger than the airline industry.

A Powerful Economic Engine

What makes gaming such an economic powerhouse? It is a unique segment of the U.S. entertainment industry that depends on a large workforce and the support of thousands of outside vendors and suppliers, which makes it dynamic in creating jobs and fueling economic growth.

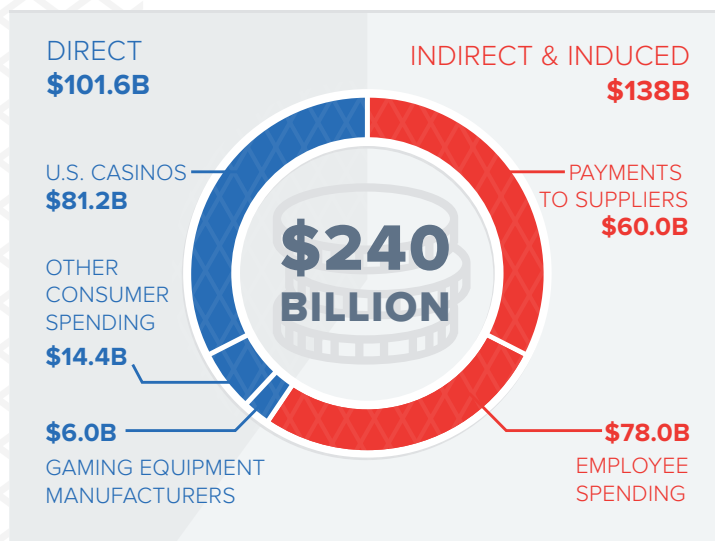
Public support of casino gaming is at an all-time high, with nine-in-ten voters across political lines stating that gaming is an acceptable activity. Communities and destinations across America are feeling the positive impacts of gaming.

U.S. Commercial Casinos: 510 casinos operate in 23 states. Whether on land-based, riverboat or dockside, commercial casinos offer games of chance and skill and are taxed and regulated by the state in which they are located.

Tribal Casinos: Approximately 474 casinos are located on reservations in the 28 states where Native Americans view gaming as a catalyst for economic development.

- In all, commercial and tribal casinos in 39 states generate enough consumer demand to produce total revenues of more than \$81 billion – almost as much as U.S. households spent at hotels last year.

Gaming Equipment Manufacturers: Oxford's study includes U.S. companies that make the table games, slot machines, and other games on the casino floor.



- U.S. gaming equipment manufacturers produce nearly \$6 billion in total revenues.

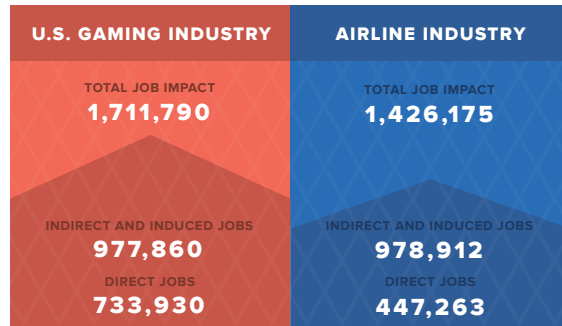
Furthermore, gaming stimulates economic activity in its communities and boost industries across all sectors.

- Nearly two-thirds of casino visitors spend money at local small businesses and other nearby attractions – this spending totals more than \$14 billion.
- Gaming stimulates demand among many other industries across the supply chain, adding \$60 billion in payments to suppliers and \$78 billion in spending by casino employees.

Creates Good American Jobs

Casinos are one of the largest recreational employers in America, employing more people than the airline industry. In all, the gaming industry supports more than 1.7 million jobs throughout the U.S.

- The industry alone directly employs 734,000 American workers, generating nearly \$33 billion in payroll.
- Casino purchases from its suppliers support another 383,000 jobs and spending by gaming employees sustains yet another 595,000 jobs.



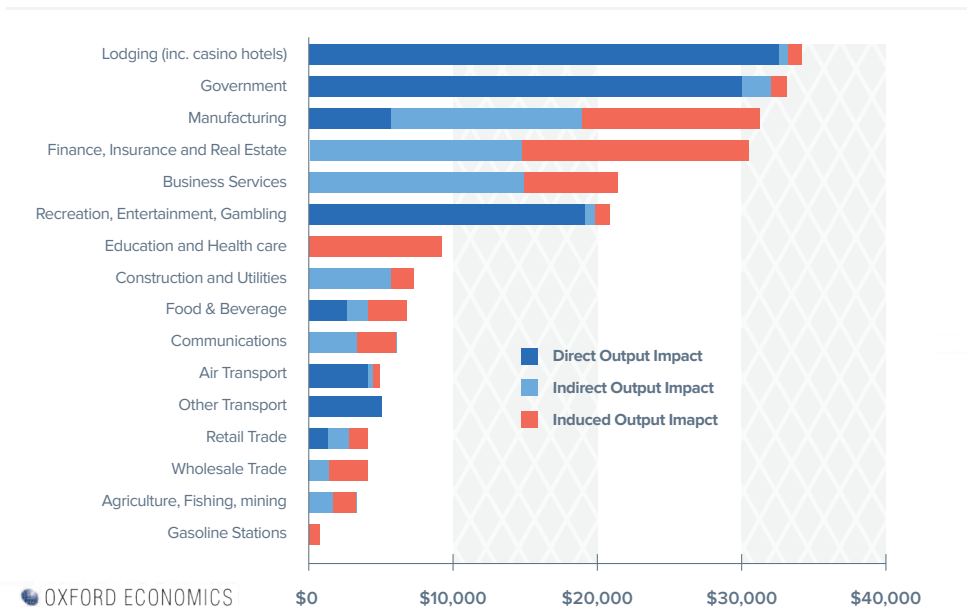
These are good paying jobs that contribute a combined \$73.5 billion in income for American workers and their families.

Bolsters Business in America

The gaming industry’s positive impact ripples through the national economy, generates revenue and supports jobs for supplier industries. From banking and accounting to health care for casino workers, to college loans for employees’ families, gaming benefits all sectors of the economy.

GAMING BOOSTS INDUSTRIES ACROSS ALL SECTORS

DISTRIBUTION OF OUTPUT IMPACTS BY MAJOR INDUSTRY



OXFORD ECONOMICS

Builds A Strong Tax Base

A strong majority agree that the gaming industry improves the local economies. That's because voters see gaming tax revenues at work in their towns and cities, paying for public services that range from local police and fire departments to schools and libraries.

Gaming produces more than \$38 billion in taxes, including:

- \$17.3 billion in federal taxes, including \$7 billion in Social Security taxes;
- \$11 billion in state and local taxes, including \$4 billion in sales taxes and \$1.6 billion in personal income taxes; and
- Another \$10 billion in state and local gaming taxes.

Total tax revenues generated by gaming are enough to pay more than half-a-million school teachers' salaries.

Casino Visitors: A Portrait of America

Today's casino patrons are a portrait of America. They are educated, middle class and many attend regular religious services. Increasing numbers are Millennials.



- Nearly two-in-three casino visitors are homeowners and 70 percent are middle class or upper-middle class.
- Nearly half of casino visitors are college graduates.
- More than a third attend religious services every week. One in four is an evangelical or a born-again Christian.
- The majority is between 21 and 49 years of age.

When casino visitors gamble, more than three-in-four set a budget, with a majority of visitors setting a budget of less than \$200.

Why do they visit casinos? Nearly two-thirds of casino patrons say they go to casinos for the same reasons they enjoy other entertainment, such as shopping, going to a ball game, or attending a concert: to have fun and to socialize with friends and family.

THE BOTTOM LINE

Partner with an Industry that Delivers

So why does any of this matter? Because, while the industry's contributions are enormous, they could be even greater. Our message around the country is clear: if policymakers work with gaming as partners, the industry can create even more jobs and continue to strengthen communities.

It's time for policymakers and gaming policy to catch up to public opinion. The American people have made their decision about gaming:

- American voters believe casinos improve their communities, help local economies and promote job creation.

The gaming industry was once niche and novel. That's not the case anymore. We operate in 39 states and make up a critical component of the U.S. economy.

We are calling on policymakers to work with us to adopt policies that reflect our economic standing and the vital contribution we make to communities. AGA wants to work with policymakers to create an environment where gaming can grow and thrive.



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