

Facts at Your Fingertips

U.S. Commercial Casino Industry

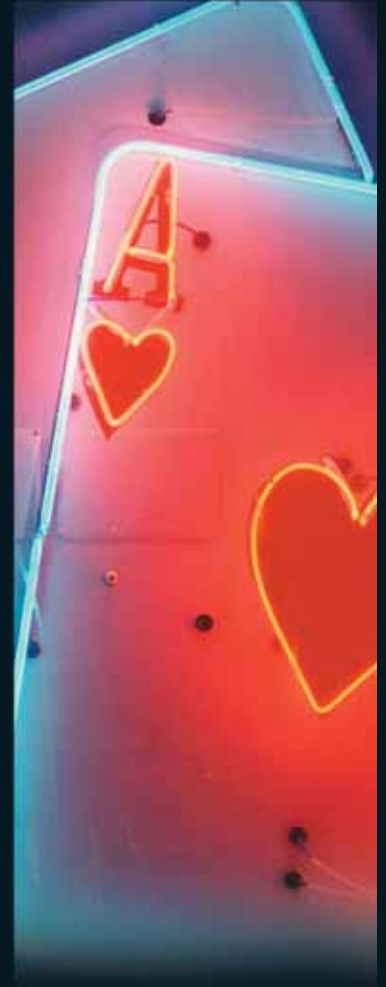


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Section One: Industry Overview

While the primary purpose of this publication is to provide information and resources about the U.S. commercial casino industry, there actually are five forms of legal gaming in the United States. In total, 48 states have some form of legal gaming. To provide a snapshot of how the commercial casino industry fits into the overall gaming industry, brief descriptions of each category of legal gaming are included below.

Five Types of Legal Gaming in the United States

CHARITABLE GAMING*

Charitable gaming is run for the benefit of nonprofit organizations, although the nonprofit may not necessarily be the operator of the games. Some examples of charitable gaming are PTA Monte Carlo nights, church raffles and bingo. Charitable gaming is the least regulated area of legal gaming.

COMMERCIAL CASINO GAMING*

Casino gaming is the largest part of the commercial gaming market, and it continues to grow in popularity due to the creation of new casino destinations and the expansion of existing casino locales. A casino is usually characterized by the offering of banked games. Banked games are those in which the house is banking the game and essentially acting as a participant, meaning that the casino has a stake in who wins.

Commercial casino gaming takes a variety of forms, the most recognizable of which consists of what are called Las Vegas-style casinos. Other commercial gaming venues include excursion (mobile) and dockside (permanently moored) riverboats, card rooms and racetrack casinos, commonly called racinos.

LOTTERIES*

Though lotteries have a long tradition in the United States that goes back to colonial days, there were no legal, government-sponsored lotteries operating in the country from 1894 to 1964. Legal lotteries experienced a rebirth in the 1960s. The first legal lottery in the twentieth century was the New Hampshire Sweepstakes, which began on March 12, 1964. Other northeastern states quickly followed. In 1981, Arizona became the first state west of the Mississippi River to authorize a lottery.

NATIVE AMERICAN GAMING

In 1988, the Indian Gaming Regulatory Act legalized tribal gaming operations. Many tribes have viewed gaming as an opportunity to further economic development. Modern Native American gaming operations are owned and, in some cases, operated by sovereign tribes. Often, tribes contract with established commercial casino companies to operate the tribal gaming operations.

PARI-MUTUEL WAGERING*

Pari-mutuel wagering refers to the type of gaming where the total prize pool is based upon the amount of money wagered. The more money gambled, the bigger the prize. Horse racing is the best known and most widespread pari-mutuel betting event, but other forms of pari-mutuel wagering include dog racing and jai-alai.

*Adapted from Dunstan, Roger. *Gambling in California*. Jan. 1997. (www.library.ca.gov/CRB/97/03/crb97003.html)

For location and economic information about the various types of legal gaming in the United States, refer to the AGA's annual *State of the States: The AGA Survey of Casino Entertainment* (<http://www.americangaming.org/survey/index.cfm>).



Industry Overview continued

A Brief History of the Modern Commercial Casino Industry

75 Years of Commercial Gaming in the United States

- 1931 Nevada legalizes casino gaming
- 1947 The Flamingo, operated by mobster Bugsy Siegel, opens in Las Vegas
- 1950 The Senate Committee to Investigate Organized Crime in Interstate Commerce, chaired by Sen. Estes Kefauver, begins to hold hearings on criminal influence in the casino industry
- 1955 Nevada passes legislation creating the Gaming Control Division under the Nevada Tax Commission. This legislation establishes unequivocally that licensing of a casino owner is a privilege revocable by the state
- 1958 The Stardust Hotel opens, breaking the mold of the traditional “star headliner” entertainment act by debuting a stage spectacular as its main entertainment feature. This form of entertainment would become widespread on the Las Vegas Strip
- 1959 Nevada passes legislation creating a State Gaming Commission, independent of the Tax Commission, whose function would be establishing and administering gaming regulations. The Commission and its enforcement arm, the State Gaming Control Board, develop rigorous application and investigation processes to screen persons for their suitability for casino ownership and operation. This legislation continues to define the framework for the regulation of gaming in Nevada
- 1966-1970 Howard Hughes purchases numerous casino properties in Nevada. His involvement is a strong signal that the Nevada casino industry presents investment opportunities for legitimate business people, and that the industry is not teeming with mob influence as once was thought
- 1967 and 1969 Nevada passes two Corporate Gaming Acts, which remove barriers against the direct involvement of corporations in the casino industry. These laws expand existing casino operators’ access to financial capital through legitimate debt and equity markets, allow existing public corporations to acquire casinos, and increase the amount of public information on the profitability and ownership of casino operations
- 1973 Harrah’s Entertainment becomes the first “pure casino” company to be traded on the New York Stock Exchange
- 1976 New Jersey becomes the second state to legalize casino gaming
- 1978 The first casino opens in Atlantic City, N.J.
- 1989 The Mirage Hotel & Casino Resort opens in Las Vegas, ushering in the era of the destination casino resort. Upon its opening, the Mirage is the most expensive hotel casino in history, with construction costs of \$630 million. With more than 3,000 rooms and headliner attractions such as the Siegfried and Roy show, the Mirage sets the new standard for Las Vegas casinos

Sources: American Gaming Association (www.americangaming.org/industry/factsheets); Dunstan, Roger. *Gambling in California*. Jan. 1997. (www.library.ca.gov/CRB/97/03/crb97003.html); Eadington, William R. “The Evolution of Corporate Gambling in Nevada.” *The Gambling Papers: Proceedings of the Fifth National Conference on Gambling and Risk Taking*, 7. 1982; Wikipedia.

- 1989 South Dakota and Iowa legalize gaming, kicking off a five-year period of the largest expansion of gaming into new jurisdictions in U.S. history
- 1992 The first racetrack casino (racino) opens in Rhode Island. Two years later, four additional states — Delaware, Iowa, Louisiana, and West Virginia — legalize racinos
- 1992 Chef Wolfgang Puck opens Spago Las Vegas at the Forum Shops at Caesars. Puck is the first “celebrity chef” to open a contemporary fine dining restaurant in the city. The opening of Spago Las Vegas ushers in a new style of dining in the city, initiating Las Vegas as a worldwide culinary attraction and beginning the food and beverage (F&B) revolution in the commercial casino industry
- 1995 The commercial casino industry creates the American Gaming Association (AGA)
- 1996 The National Center for Responsible Gaming is created
- 1997-1999 The National Gambling Impact Study Commission, a congressional study examining the economic and social impacts of commercial casinos, is conducted. Findings reveal commercial casinos provide positive economic and social benefits for casino communities
- 2003 The AGA board of directors enacts the *AGA Code of Conduct for Responsible Gaming*, an industry pledge to employees, patrons and the public to integrate responsible gaming practices into every aspect of daily operations
- 2005 Mega-mergers of casino companies become the norm as MGM MIRAGE acquires Mandalay Resort Group in April and Harrah’s Entertainment, Inc. acquires Caesars Entertainment in June
- 2005 Gross gaming revenues in the United States top \$30 billion for the first time
- 2006 The first racetrack casinos open in Florida and Pennsylvania, bringing the total number of states with racinos to 11
- 2007 The Kansas legislature, and subsequently voters in four counties, legalize state-owned casino gambling at four locations.
- 2008 Two racinos open in Indiana, bringing the number of states with racetrack casinos to 12.
- 2008 Voters in Maryland pass a statewide referendum legalizing 15,000 slot machines at five locations throughout the state.

Today's Commercial Casino Industry

The commercial casino industry is an important part of the U.S. entertainment industry and the U.S. economy. It is vital to the states and communities where it operates, creating jobs and business opportunities for local businesses and providing direct gaming tax revenues to stimulate struggling economies and help communities grow. There are few sectors in our national economy that require such considerable capital expenditures, are as labor intensive and are as supportive of thousands of outside vendors and suppliers as the commercial casino industry. Thanks to these myriad contributions, gaming companies are stable business partners, playing a key role in the broader economic landscape of their host communities.

Internationally, many U.S. commercial casino companies have helped to build the industry into an important part of the global economy by pursuing investment opportunities in emerging foreign markets. While expanding in size, the industry also continues to evolve in scope, providing new entertainment offerings and adopting technological innovations to deliver the best possible customer experience.

TAXES AND RIGOROUS REGULATION

The commercial casino industry is one of the most transparent, regulated, monitored and taxed industries in the United States. Many of today's commercial casino companies and gaming equipment manufacturers are publicly held companies that are traded on the New York Stock Exchange (NYSE) and the NASDAQ stock exchange.

The strict regulation of the industry is due largely to the fact that state governments, who play the primary role in regulating the industry, depend on casino earnings for a substantial portion of their tax revenues. Gaming taxes vary by state, ranging from 6.75 percent of gross gaming revenue for the largest casinos in Nevada to 55 percent of gross gaming revenue for casinos in Pennsylvania.

The billions of dollars in state and local tax revenue paid by the gaming industry go to fund necessary programs and expenditures like education, public safety, historic preservation, infrastructure improvements, economic development and youth and senior services.

(For more information on state tax rates, see the AGA's annual *State of the States* survey at www.americangaming.org/survey/index.cfm.)

States with legalized commercial casino gaming employ state regulating agencies to enforce a significant number of financial disclosure rules on casinos to ensure the states receive the taxes due to them each year. The agencies also direct and review audits of casino operators to ensure accurate measurement of the revenue numbers that result in state tax dollars. The total cost of state regulation reaches hundreds of millions of dollars each year, and the Nevada Gaming Control Board alone employs approximately 450 individuals.

Most states require casinos to adopt and adhere to a set of state-designated procedures, typically called the "Minimum Internal Control Standards (MICS)." These MICS focus on several aspects of the industry, including the conduct of games, the movement and handling of cash and equivalents, and the accounting and record trail of all transactions.

Casino companies also are regulated at the federal level. In addition to complying with laws such as the Americans with Disabilities Act and other labor laws that affect all U.S. businesses, casino companies are required to comply with several regulations typically directed at financial institutions, such as banks and money-lending operations, due to the large amount of currency transferred on the casino floor. The Bank Secrecy Act was amended in 1985 to include casinos and other cash-intensive businesses in a list of financial institutions subject to special requirements designed to prevent money laundering. The Act requires casinos to report every deposit; withdrawal; exchange of currency, gambling tokens or chips, or other payment; or transfer that is made by, through, or to the casino in amounts greater than \$10,000.

There are additional federal laws that affect commercial casinos in different ways. For example, riverboat casinos are subject to laws governing the federal Maritime Transportation Security Act. The industry also works closely with the Internal Revenue Service on a number of tax-related issues.

INCREASED INTERNATIONAL PRESENCE

The international gaming industry is rapidly growing, both in size and into new jurisdictions. A number of U.S. commercial casino companies either have operations in foreign markets or are actively pursuing expansion abroad. In the past few years, Asian gaming markets in particular have experienced exponential growth, and many U.S. companies are seeking to open new properties there. Of the Asian markets, Macau is the largest and most successful, and often is referred to as the “Las Vegas of the East.” In fact, beginning in 2006, gross gaming revenue in Macau has surpassed that of the Las Vegas Strip. Other Asian markets like Taiwan and Korea are considering casino gaming, and casino properties in Singapore will soon further expand the Asian gaming industry.

GROWTH OF NON-GAMING AMENITIES

Over the past several years, many of the commercial casinos in Las Vegas and beyond have metamorphosed into multi-component entertainment venues offering a wide variety of non-gaming amenities ranging from spas, golf courses and theater-style shows to retail shopping, fine dining and more. Building and publicizing a diverse range of amenities and food and beverage (F&B) options has been one of the key ways in which properties on the Las Vegas Strip and throughout the country differentiate themselves from their competitors and attract new customers.

In fact, on the Strip, non-gaming amenities have become an important part of the industry's bottom line. According to the Nevada Gaming Control Board, non-gaming revenue on the Las Vegas Strip in fiscal year 2008 accounted for more than 60 percent of total revenue compared to just over 40 percent 15 years earlier. This number does not take into account independent restaurants and shops located in casinos, which account for a significant share of the overall F&B and amenity spending on the Strip.

While the Las Vegas Strip is not representative of all U.S. gaming jurisdictions, it does continue to lead industry trends. The importance of integrating a diverse portfolio of amenities and entertainment options into casino offerings is growing in other markets from Biloxi, Miss. to Detroit, Mich. and from Kansas City, Mo. to Atlantic City, N.J.

Industry Overview continued

TECHNOLOGICAL INNOVATIONS

The commercial casino industry continues to introduce new technologies that improve the overall customer experience and the efficiency of casino operations. A number of technologies are changing the modern gaming floor including: a general overall movement toward completely cashless slot floors thanks to the increasing utilization of ticket-in/ticket-out (TITO) technology; the introduction of server-based games that allow operators to make changes to any slot machine on the floor from a single secure computer server within the casino; multi-player games that allow customers to compete against each other on a single machine; and radio frequency identification (RFID), which several casinos are using in their casino chips to improve security and player tracking, and to increase the rating integrity of both players and dealers.

For information on the technology of slot machines and similar games found on the commercial casino gaming floor, access a copy of International Game Technology's (IGT) Introduction to Slots and Video Gaming at <http://media.igt.com/Marketing/PromotionalLiterature/IntroductionToGaming.pdf>.

GAMING EQUIPMENT MANUFACTURING SECTOR

Gaming equipment manufacturing is an important and sometimes overlooked sector of the gaming industry. It includes suppliers of electronic gaming devices, systems, table games, key components and support products and services for the gaming industry. Gaming equipment manufacturing is a global industry with companies based in the United States and abroad and operating around the world.

According to a report produced by the Association of Gaming Equipment Manufacturers (AGEM), in 2007, the equipment manufacturing sector's made significant contributions to the U.S. economy, providing 28,200 jobs that paid an estimated \$1.9 billion in salaries, as well as approximately \$11.9 billion in direct revenues. The global gaming supplier sector also generates a significant amount of public revenues, including almost \$1 billion in corporate taxes. Many gaming equipment manufacturers are members of both AGEM and the American Gaming Association (AGA) and participate with casino operators in industrywide responsible gaming, diversity and philanthropy programs.

GAMING INDUSTRY EMPLOYMENT OPPORTUNITIES

The gaming entertainment industry offers some of the most dynamic and rewarding professional opportunities available today. It is a fast-paced and exciting industry, offering a multi-faceted corporate environment with extremely diverse career possibilities ranging from architecture and accounting to hotel management, computer science and information technology.

Employers in the gaming industry have a proven record of promoting from within and investing in their employees. Gaming industry employees receive highly competitive salaries and excellent benefits packages that can include health care benefits, retirement plans, paid vacation, child care options, training programs and tuition reimbursement. The industry consistently experiences extremely high employee satisfaction ratings and boasts impressive retention rates.

COMMITMENT TO CHARITABLE GIVING

Members of the gaming industry are among the most philanthropically active and largest donors among corporations. They contribute millions of charity dollars each year, and employees donate thousands of volunteer hours annually. Whether through support of charities associated with medical services delivery or research, care of the elderly, local infrastructure, or environmental sustainability, casino companies post an outstanding record of corporate responsibility. In the wake of Hurricane Katrina, gaming companies led in efforts to support the victims and were some of the most active in reinvesting in the Gulf Coast. During this time, the casino industry became a model for other employers for providing security of income, access to health care and a substantial infusion of capital to rebuild.

ENVIRONMENTAL SUSTAINABILITY

The commercial casino industry is committed to environmental sustainability and is a leader in this area among hospitality and entertainment businesses. Las Vegas is a prime example of the industry's dedication to the environment, as it is soon to be home to the world's largest concentration of environmentally friendly hotel rooms. A total of 15 major new building projects there are seeking the U.S. Green Building Council's Leadership in Environment and Energy Design (LEED) Certification. These properties feature environmentally responsible construction and design, including low-water pressure showerheads, fluorescent light bulbs, super-insulating windows and walls, and the use of recycled building materials.

Commercial casinos, resorts and manufacturers across the country have adopted additional sustainability programs to reduce their environmental impacts. Some of these green policies include replacing incandescent lights with cold-cathode lights on marquees; developing an environmentally-friendly laundry facility that uses 75 percent less water, 47 percent less natural gas and 27 percent less electricity; composting trees and plants that are no longer viable and replacing individual guest room air conditioning units with more efficient units.

TRAVEL AND TOURISM

The commercial casino industry plays a vital role in the overall U.S. travel and tourism industry. Roughly one-quarter of the U.S. adult population visits a casino at least once a year, and casinos attract a substantial number of visitors from overseas. In fact, a 2009 survey found that 65 percent of Americans think the casino industry is important to the overall U.S. travel industry. Today's casinos provide top-notch entertainment experiences that go well beyond gaming. The diverse amenities that make up the modern casino resort attract all types of tourists who also visit neighboring attractions, thus further stimulating the local economy.

Many gaming facilities also include state-of-the-art convention centers and meeting facilities, making them important components of the business travel market. In fact, many gaming communities are some of the most popular convention cities in the country thanks to the level of value and service they provide. Two-thirds of the national survey respondents consider casinos a vital part of the business travel market.

Section Two: Industry Initiatives

Diversity

The commercial casino industry has been a long-time proponent of diversity in the workplace, both in internal hiring and human resources policies as well as in purchasing and contracting practices. The commercial casino industry and the companies that comprise it are engaged in a variety of diversity initiatives, some of which are described below. For more information about industrywide and company-level diversity initiatives, visit the AGA Online Diversity Resource Guide (www.americangaming.org/diversity) or contact individual companies. (See contact pages in section six.)

The AGA's diversity programs are overseen by the AGA Diversity Task Force. Created in 2000, the task force promotes inclusion in all aspects of the commercial casino industry. It conducts workshops for industry professionals, suppliers, and minority, women, and disadvantaged business enterprises (MWDDBE); collects data on industry diversity; and creates and organizes programs designed for industrywide implementation. The task force has three subcommittees: Construction, Human Resources and Purchasing and Contracting.

RESEARCH

The success of the industry's diversity efforts is measured in two reports, *Gaming Industry: Employment Diversity Snapshot 2008* and *Gaming Industry: Spend Diversity Snapshot 2008*. Highlights from the reports include:

- In 2007, casinos employed a greater percentage of Black, Hispanic and Asian workers than the U.S. workforce. Overall, participating casinos employed more minorities than the national U.S. workforce by 20.6 percent.
- Casinos employed more minorities than other businesses in the arts, entertainment, recreation, accommodation and food services sectors (by 9.9 percent). They also employed more minority officials and managers, professionals and technicians than these other businesses.
- Overall, casinos purchased more than \$631 million in products and services from diverse vendors in 2007, which is 13.2 percent of total eligible commodity spend. This percentage exceeds national standards and is significantly greater than that of other industries.

The reports were prepared by PricewaterhouseCoopers LLP. The 2008 employment report is the third installment in a series of employment diversity reports; two previous studies were conducted in 2001 and 2003. The 2008 spend diversity report represents the first such report on procurement diversity from the industry. Eight casino companies, representing 110 individual casinos and more than 202,000 employees, participated in the 2008 employment diversity snapshot. Six casino companies, representing 100 individual casinos, participated in the 2008 spend diversity snapshot.

Copies of the 2008 reports can be downloaded at <http://www.americangaming.org/publications/diversity-snapshot.cfm>.

INDUSTRY PROGRAMS

Supplier Diversity Reporting Program

In November 2006, the Purchasing and Contracting subcommittee of the AGA Diversity Task Force launched a new Tier II Diversity Reporting Program for suppliers. The program requires companies who supply the commercial casino industry with goods and services to report on their own diversity practices in the areas of purchasing and contracting. The program does not mandate a diversity threshold that suppliers have to meet, but the Diversity Task Force informed suppliers that companies doing a better job with diversity would be more attractive business partners for casino companies.

For more information on the Tier II Diversity Reporting Program, view the press release on the program announcement at www.americangaming.org/Press/press_releases/press_detail.cfv?ID=408.

G2E Diversity Exhibitor Program

Global Gaming Expo (G2E), the world's largest gaming industry trade show and conference, launched a diversity exhibitor program in 2006. The program focuses on bringing MWDBEs together with purchasing executives from leading gaming companies. To facilitate this networking, the G2E Diversity Exhibitor Program highlights program participants in pre-show materials and makes it easy for casino purchasing executives to find the companies on-site with special signage and dedicated listings in show materials. Program participants also receive special price consideration for exhibit space. (See Global Gaming Expo (G2E) in section five for more information.)

Supplier Outreach and Development

Since its inception, the AGA has organized several expos and events focused on diversity in purchasing and contracting. These events focus on connecting MWDBE owners with purchasing executives from commercial casino companies, and on educating MWDBEs who want to do business with commercial casinos about how to break into the industry.

Responsible Gaming

While several individual gaming companies already had been at the forefront of responsible gaming activities for many years, the creation of the American Gaming Association (AGA) in 1995 provided the industry a unique opportunity to work together toward a consistent strategy for implementing responsible gaming practices.

The AGA immediately built on the existing successful efforts of individual casino companies by developing education and public awareness programs that could be used across the industry. In 1996, the AGA released the *Responsible Gaming Resource Guide*, the first comprehensive guide to implementing customer and employee education programs. Since then, the AGA and its members have made significant progress in casting a national spotlight on responsible gaming and disordered gambling issues through the creation of the National Center for Responsible Gaming, as well as highly successful programs such as the

Industry Initiatives continued

AGA Code of Conduct for Responsible Gaming, the Responsible Gaming National Education Campaign and Responsible Gaming Education Week. To learn more about the AGA's industrywide responsible gaming initiatives, including those listed below, visit www.americangaming.org/programs/responsiblegaming/history.cfm.

NATIONAL CENTER FOR RESPONSIBLE GAMING

In 1996, the AGA and its member companies created the National Center for Responsible Gaming (NCRG) as the first and only national organization devoted exclusively to the funding of peer-reviewed research on disordered gambling and to educating the public about responsible gaming. (See National Center for Responsible Gaming (NCRG) in section five for more information.)

AGA CODE OF CONDUCT FOR RESPONSIBLE GAMING

The AGA and its members codified their commitment to employing responsible gaming practices across the industry when the AGA board of directors enacted the AGA Code of Conduct for Responsible Gaming in 2003. The AGA Code of Conduct is an industry pledge to employees, patrons and the public to integrate responsible gaming practices into every aspect of daily operations, including employee assistance and training, alcohol service policies, and advertising and marketing practices. The AGA and its members' continued support for responsible gaming research initiatives and public awareness programs targeting issues such as underage drinking and gambling also is reinforced in the code. To see the full text of the AGA Code of Conduct, visit www.americangaming.org/programs/responsiblegaming/code_public.cfm.

RESPONSIBLE GAMING NATIONAL EDUCATION CAMPAIGN

In 1998, the AGA launched the Responsible Gaming National Education Campaign, a long-term comprehensive program to promote responsible gaming practices and increase knowledge and awareness of disordered and problem gambling. The program now serves as the foundation for the association's growing list of responsible gaming outreach activities and initiatives, including the popular "Keep it Fun" campaign that was launched in 2005. Throughout the year, the AGA publishes a number of information resources on responsible gaming for casino companies and patrons, including guides about the odds of winning at popular casino games and responsible gaming behavior. The majority of the materials currently are available in English and Spanish. The "Keep It Fun" campaign also includes a guide to responsible gaming that is available as a brochure in many casinos nationwide and a series of public service announcements (PSAs). The guide to responsible gaming and the PSAs are available on the AGA Web site at <http://www.americangaming.org/keepitfun.cfm>.

RESPONSIBLE GAMING EDUCATION WEEK (RGEW)

The signature program of the Responsible Gaming National Education Campaign is Responsible Gaming Education Week (RGEW), which the AGA and its members created in 1998. Held during the first week of August each year, RGEW is an industrywide education outreach effort targeted to employees, patrons and the public. During RGEW, industry representatives across the country promote a national theme through organized public education and awareness programs in their communities. Past RGEWs have adopted themes such as the “The Code Word is Responsibility,” which highlighted the AGA Code of Conduct; “We’re Banding Together to Keep it Fun,” featuring bright orange awareness wristbands; “Be Responsible. Get Educated.” which empowered employees to take advantage of a wide array of responsible gaming education resources; and “Let’s Talk About Responsible Gaming,” which encouraged employees to discuss responsible gaming practices with family members, friends and casino patrons.

PREVENTING UNDERAGE GAMBLING

Preventing underage gambling always has been a high priority for commercial casino companies. The AGA and its member companies have put into place a number of policies to prevent gambling by minors, including thorough staff training on properly certifying the age of patrons suspected of being underage, advertising that discourages youth gambling and more. The prevention of underage gambling also is addressed in the AGA Code of Conduct for Responsible Gaming.

In addition, the National Center for Responsible Gaming (NCRG) — the AGA’s affiliated charity — developed “Talking with Children About Gambling,” a resource for parents and others who mentor youth on how to talk with young people about the risks of gambling. (See National Center for Responsible Gaming (NCRG) in section five for more information.)

While preventing underage gambling is a business imperative on its own, commercial casino companies have further reason to implement proactive measures that discourage and prevent the behavior because they are subject to substantial fines if they fail to enforce these regulations.

INDIVIDUAL COMPANY PROGRAMS

In addition to participating in the AGA’s industrywide responsible gaming initiatives, the AGA’s member companies implement their own responsible gaming activities and programs in their facilities and communities throughout the year. For more information about these programs, contact the companies directly. (See contact pages in section six.)

Section Three: Relevant Research

Introduction

The impact of casinos on their host communities has been a closely researched subject during the past 10 to 15 years and was even the subject of a Congressional commission, the National Gambling Impact Study Commission (NGISC), in the late 1990s.

Overall, research has revealed that casinos have a largely positive impact on the community, both economically and socially. This finding is perhaps best articulated in the final report of a 2005 survey of community leaders in gaming jurisdictions:

“In the broadest sense, elected officials and civic leaders are strikingly positive about the impact that casinos have had on their communities. They welcome the additional tax revenue, jobs, secondary economic development, and contributions to community and charitable organizations. At the same time, the negative effects predicted by casino opponents have largely failed to materialize. Taking everything into consideration, these public officials strongly endorse the decision to allow gaming in their communities — with the benefit of hindsight, fully 75 percent say they would vote to allow casinos if they could go back and do it all over again.” (Peter D. Hart Research and Associates, *Community Leaders' Perceptions of Gaming Industry's Effects*, p. 1, 2005.)

The following pages present the facts about the social and economic impacts of the commercial casino industry. The summaries provided here are intended to give an overview of these issues; further detail on these topics and others can be found in fact sheets on the American Gaming Association (AGA) Web site at www.americangaming.org/Industry/factsheets/issues.cfm.

In addition, many of the studies mentioned in this section can be found in the FAQ section of the AGA Web site (www.americangaming.org/industry/faq_index.cfm), the NCRG Web site (www.ncrg.org), or by contacting the AGA's director of communications. (See contact pages in section six.) For an electronic version of the NGISC's final report, which contains detailed reviews of the issues summarized here, as well as others, visit <http://govinfo.library.unt.edu/ngisc/reports/fullrpt.html>.

ECONOMIC IMPACT

Studies investigating the economic impact of casinos on the community have been conducted in many jurisdictions throughout the United States. As a whole, these studies report that casinos provide significant economic benefits to the communities in which they operate, as well as their employees. Among the specific findings of these studies are:

- A study by the University of Chicago's National Opinion Research Center (NORC) found that communities closest to casinos experienced a 12 percent to 17 percent drop in welfare payments, unemployment rates and unemployment insurance after the introduction of casino gaming. NORC also found that communities with casinos have 43 percent higher earnings in their hotel and lodging sectors than those communities farther from casinos. (National Opinion Research Center, et al. *Gambling Impact and Behavior Study: Report to the National Gambling Impact Study Commission*, pp. 70-71, April 1, 1999.)

- Prior to Hurricane Katrina, the Mississippi Employment Security Commission reported that between 1990 and 2004, overall employment grew by 58 percent in the Biloxi-Gulfport area, which is a hub of gaming operations in the state. This figure can be contrasted with overall statewide employment growth of 20 percent during that period. (Mississippi Department of Employment Security, www.mdes.ms.gov)
- “This report estimates both the benefits and the costs to Indiana citizens from opening ten riverboat casinos in Indiana. It compares an alternative, counterfactual policy in which Indiana did not permit casinos with Indiana’s fiscal year 2005 policy of licensing, regulating, and taxing ten riverboat casinos. On a single-year basis for FY 2005 we find that the benefits significantly exceed the costs of this policy to Indiana by a minimum of \$717.29 million.” (*Policy Analytics, LLC. “A Benefit-Cost Analysis of Indiana’s Riverboat Casinos” for FY 2005: A Report to the Indiana Legislative Council and the Indiana Gaming Commission. Jan. 17, 2006.*)
- “It appears that Detroit’s casinos are effective in contributing to the tourism activity in the community: 1) They are effective in attracting tourists and generating new money in the area. 2) They generate taxes and employment. 3) They contribute to other community tourism-related businesses. On the other hand, crime volume did not increase following casino gaming development in the city. In addition, it was found that bankruptcy filings in Detroit did not increase a year after the casinos opened in the city.” (Moufakkir, Omar and Holecek, Donald. *Impacts of Detroit Casinos on the Local Community*. Unpublished Dissertation. Michigan State University. p. 6. 2002.)
- In an economic analysis he prepared for the NGISC, Penn State University economist Adam Rose found little evidence of economic substitution after the introduction of new casinos: “The preponderance of empirical studies indicate claims of the complete ‘cannibalization’ of pre-existing local restaurants and entertainment facilities by a mere shift in resident spending is grossly exaggerated.” In fact, Rose concluded that “[A] new casino of even limited attractiveness, placed in a market that is not already saturated, will yield positive economic benefits on net to its host economy.” (Adam Rose and Associates. *The Regional Economic Impacts of Casino Gambling: Assessment of the Literature and Establishment of a Research Agenda*. State College, Pa.: Adam Rose and Associates. pp. 19, 22. Nov. 5, 1998.)
- “In three of four cases, rural counties that adopted casino gaming experienced increases in household and payroll employment. This seems to hold even though casino employment is dispersed over several counties rather than just the home county.” (Garrett, Thomas A. “Casino Gaming and Local Employment Trends.” *Federal Reserve Bank of St. Louis Review*, 86(1), p. 21. January/February 2004.)

Research also shows that the presence of a casino has no recognizable effect on the number of personal bankruptcies within a community. For example, a 2004 study of personal bankruptcy rates conducted in the riverboat gaming states of Iowa, Illinois, Missouri and Mississippi found that “access by individuals to pari-mutuel or casino gaming facilities was found to have no statistically significant impact on personal bankruptcy filings.” (Thalheimer, R. and Ali, M. “The Relationship of Pari-Mutuel Wagering and Casino Gaming to Personal Bankruptcy.” *Contemporary Economic Policy*, 22(3), 2004, 420-32.) Other research on this topic has come to similar conclusions.

PATHOLOGICAL GAMBLING

The American Psychiatric Association uses the term “pathological gambling” to describe the clinical disorder characterized by a persistent and recurring failure to resist gambling behavior that is harmful to the individual and concerned others (*Diagnostic and Statistical Manual of Mental Disorders, Fourth Edition*). This diagnosis identifies the most severe form of the disorder, or level 3 as categorized by scientists. Level 2 refers to individuals who experience problems with their gambling but do not meet the criteria laid out by the diagnostic manual.

Numerous studies published since the mid-1990s have found that while the vast majority of Americans are level 1 gamblers — i.e., can gamble without experiencing adverse effects — there exists a small percentage of people who are identified as level 3 or pathological gamblers. These studies have established the prevalence rate of pathological gambling as close to **1 percent of the U.S. adult population**. Despite the tremendous expansion of casino gambling in the U.S. in recent years, numerous studies have indicated that the prevalence rate has remained stable. Examples of these studies include:

- A 1997 meta-analysis by Harvard Medical School's Division on Addictions, which estimated 1.29 percent of the adult populations of the U.S. and Canada could be classified as having serious pathological gambling problems. (Shaffer, H.J., Hall, M.N., and Vander Bilt, J. “Estimating the prevalence of disordered gambling behavior in the United States and Canada: a meta-analysis.” Boston: Presidents and Fellows of Harvard College. 1997. Shaffer, H.J., Hall, M.N., and Vander Bilt, J. “Estimating the prevalence of disordered gambling behavior in the United States and Canada: A research synthesis.” *American Journal of Public Health*, 89, pp. 1369-1376. 1999.)
- A study conducted by the National Research Council of the National Academy of Sciences for the NGISC re-analyzed the data from the Harvard Medical School meta-analysis in order to isolate the estimates for the United States and found a pathological gambling prevalence rate of 0.9 – 1.5 percent. (National Academy Press. *Pathological Gambling: A Critical Review*. 1999.)
- A study published in the *Journal of Clinical Psychiatry* in 2005, which estimated a lifetime prevalence rate of pathological gambling at 0.42 percent based upon data derived from a sample of more than 43,000 U.S. residents aged 18 and older. The authors also concluded that, “Pathological gambling is highly comorbid with substance use, mood, anxiety, and personality disorders, suggesting that treatment for one condition should involve assessments and possible concomitant treatment for comorbid conditions.” (Petry, N.M., Stinson F.S., Grant B.F. “Comorbidity of DSM-IV Pathological Gambling and Other Psychiatric Disorders: Results from the National Epidemiologic Survey on Alcohol and Related Conditions.” *Journal of Clinical Psychiatry*, 66(5). May 2005.)
- In a 2008 study published in *Psychological Medicine*, researchers reported a pathological gambling rate of 0.6 percent and a problem gambling rate of 2.3 percent. These findings are consistent with other previously published large-scale prevalence studies. Researchers also found a high rate of concurrent psychiatric problems among disordered gamblers, as well as evidence that disordered gamblers often start gambling at an earlier age than those who can gamble responsibly. (Kessler, R.C., Hwang, I., Labrie, R., Petukhova, M., Sampson, N.A., Winters, K.C., & Shaffer, H.J. DSM-IV pathological gambling in the National Comorbidity Survey Replication. *Psychological Medicine*, 38(9), 1351-60. Sept 2008.)

Additional research on gambling disorders and the potential effect of casinos on the public health has revealed the following:

- “Probable pathological gambling rates may actually have fallen in Connecticut, and have certainly not risen, during a period in which one of the largest casinos in the world was opened in the state.” Follow-

up studies in Louisiana, South Dakota, Michigan, Minnesota, Oregon, Texas, Washington, British Columbia and South Africa uncovered similar results. (WEFA Group. *A Study Concerning the Effects of Legalized Gambling on the Citizens of the State of Connecticut*. June 1997.)

- In its final report to the NGISC, the Public Sector Gaming Study Commission summarized the evidence as follows: "In short, there is no solid basis for concluding that the wider legalization of gambling, which has cut into illegal gambling and friendly betting, has caused a concomitant increase in pathological gambling. In fact, it appears that pathological gambling is quite rare within the general population, [and] it does not appear to be increasing in frequency." (Public Sector Gaming Study Commission. *Final Report of the Public Sector Gaming Study Commission*. p. 35. 2000.)
- A 2008 study published in *Psychology of Addictive Behaviors* found that the current prevalence rates of pathological gambling are not higher near a casino than they are far away from it. Researchers concluded that, "in a setting in which many types of gambling activities are available, casino proximity in itself does not appear to explain the rate of gambling-related problems." (Sévigny, S., Ladouceur, R., Jacques, C., Cantinotti, M. "Links between casino proximity and gambling participation, expenditure, and pathology." *Psychology of Addictive Behaviors*. Vol 22(2), pp. 295-301. Jun 2008.)

Recent research has shown that disordered gambling behavior might be a manifestation of an underlying addiction syndrome that accounts for all addictions, meaning addictions — whether to drugs, alcohol, food, shopping or gambling — are all related. According to this model, all addictive disorders generally follow the same development pattern and share similar risk factors and consequences. In fact, many individuals who suffer from gambling addiction also suffer from other addictions, a phenomenon known as comorbidity. (Shaffer, H.J., LaPlante, D., LaBrie, R., Kidman, R., Donato, A., and Stanton, M. "Toward a syndrome model of addiction: Multiple expressions, common etiology." *Harvard Review of Psychiatry*, 12, pp. 367-374. 2004.)

The concept of addiction as syndrome and the recognition of comorbidity in disordered gamblers holds promise for the diagnosis and, particularly, the treatment of gambling disorders. Already, significant research has indicated that pharmaceutical treatments used to treat drug abuse may be effective at treating some cases of disordered gambling. (Grant, J.E., and Kim, S.W. "Medication Management of Pathological Gambling." *Minnesota Medicine*, 89(9), pp. 44-48. 2006.)

Addictions researchers also are developing practical applications of their work. Drs. Alex Blaszczynski, Robert Ladouceur and Howard Shaffer developed a science-based strategic framework, called the Reno Model, to guide responsible gaming policy. The Reno Model sets out principles to guide industry operators, health service and other welfare providers, interested community groups, consumers, and governments and their related agencies in the adoption and implementation of responsible gaming and harm minimization initiatives, with the aim of reducing both the incidence and prevalence of gambling-related harm in the community. (Blaszczynski, A., Ladouceur, R., and Shaffer, H.J. "A science-based framework for responsible gambling: The Reno model." *Journal of Gambling Studies*, 20(3), pp. 301-317. 2004.)

Approximately one third of pathological gamblers experience natural recovery, meaning they recover without seeking or accepting formal treatment. (Slutske, W.S. "Natural Recovery and Treatment-Seeking in Pathological Gambling: Results of Two U.S. National Surveys." *American Journal of Psychiatry*. 163:297-302, February 2006.)

For more information on gambling disorders, visit the NCRG Web site at www.ncrg.org.

UNDERAGE GAMBLING

According to a 1997 meta-analysis study conducted by researchers at Harvard Medical School, most young people who gamble do so on non-casino card games, games of skill, sports and the lottery — not at commercial casinos, where patrons must be 21 or older to place a bet. (Shaffer, H.J., Hall, M.N., and Vander Bilt, J. "Estimating the prevalence of disordered gambling behavior in the United States and Canada: a meta-analysis." Boston: Presidents and Fellows of Harvard College. 1997. Shaffer, H.J., Hall, M.N., and Vander Bilt, J. "Estimating the prevalence of disordered gambling behavior in the United States and Canada: A research synthesis." *American Journal of Public Health*, 89, pp. 1369-1376. 1999.)

This finding was echoed in research conducted for the National Gambling Impact Study Commission:

- "Youths 16 and 17 years old gamble less than adults and differently from adults, primarily betting on private and unlicensed games — especially betting on card games and sports and buying instant lottery tickets." (*National Opinion Research Center. Gambling Behavior and Impact Study: Report to the National Gambling Impact Study Commission. p. ix. April 1, 1999.*)
- "Casino gambling (especially slot machines) was the second most common form of adult gambling, with one-quarter of all adults participating in the past year. The adolescents [16-17 year olds] were notably absent from casino play, with barely 1 percent reporting any casino wagers. This presumably reflects well on the enforcement efforts (particularly against fake IDs) of casino operators, among other factors." (*National Opinion Research Center. Gambling Behavior and Impact Study: Report to the National Gambling Impact Study Commission. p. 63. April 1, 1999.*)

Additional research on underage gambling has revealed the following:

- Gambling of all kinds in young women tends to lag behind men. About 25 percent of young women report any gambling on a monthly basis compared to about 48 percent of young men. (*Adolescent Risk Communication Institute. National Annenberg Survey of Youth. November 2008.*)
- The prevalence of disordered gambling is consistently higher among youth than adults; however, this prevalence rate has remained stable over the past 30 years. According to the most recent update of the Harvard Medical School meta-analysis of the prevalence of gambling disorders in the U.S. and Canada, approximately 5 percent of adolescents will experience serious problems with gambling. (Shaffer, H.J., LaBrie, R., LaPlante D., Nelson, S.E. and Stanton, M. "The road less travelled: Moving from distribution to determinants in the study of gambling epidemiology." *Canadian Journal of Psychiatry*, 48(8), pp. 159-171. 2004.)
- Adults with gambling problems often start gambling at an early age. A 2002 study published in *Psychology of Addictive Behaviors* found that "young adult gambling behavior is connected to earlier adolescent gambling, and that some of the risk factors associated with adolescent gambling are similar to those known to be linked with general adolescent delinquency." (Winters, K.C., Stinchfield, R.D., Botzet, A., Anderson, N. "A Prospective Study of Youth Gambling Behaviors" *Psychology of Addictive Behaviors*, Vol 16(1), pp. 3-9. 2002.)

Section Four: Glossary of Gaming Terms

Bingo: A game of chance in which each player has one or more cards printed with differently numbered squares on which to place markers when the respective numbers are drawn and announced by a caller. The first player to mark a complete pattern of numbers (e.g., a row) wins.

Class I Game*: A social game that is not considered a game of chance, played solely for prizes of minimal value; or, a traditional form of Indian gaming engaged in by individuals as a part of or in connection with tribal ceremonies or celebrations.

Class II Game*: A game of chance including (if played in the same location) bingo, pull-tabs, lotteries, punchboard and other games similar to bingo, whether live or electronic, in which players bet against other players; an electronic game played on a “linked” video gaming device that is connected to a central computer system.

Class III Game*: Any form of gaming besides Class I and Class II games, including electronic gaming devices with random-number generators and house banked table games.

Commercial Casino: A private-sector establishment (i.e., nongovernmental) — whether land-based, riverboat, dockside or limited-stakes — that offers games of chance and is regulated and taxed by the state where it is located.

Dockside Casino: A casino on a body of water that either is not required to cruise or is a permanently moored barge.

Effective Tax Rate: The total percentage a casino pays in taxes, including taxes on direct gross gaming revenue and admissions, as well as corporate, payroll, real estate and other taxes similar to those paid by other businesses.

Electronic Gaming Device (EGD): Any mechanical or electrical game of chance, including slot machines, video lottery terminals (VLTs), video bingo, video pull-tabs and video poker machines.

Gross Gaming Revenue: The amount a gaming operation earns before taxes, salaries and other expenses are paid — the equivalent of “sales,” not “profit.”

Handle: The estimated total amount players wager. Since the total amount includes winnings paid back to players, the handle is a much larger amount than what players actually lose.

House Advantage: A measure of how much a casino expects to win, expressed as a percentage of the player’s wager.

House-banked Game: A game in which the player bets against the house; Class III games (e.g., blackjack and other table games).

Land-based Casino: A casino that is built on an earth foundation, not on a waterway.

Limited-stakes Casino: A casino in which the allowable bet on a single hand is limited to a maximum wager.

Odds: 1) the probability of winning; 2) the payout in relation to amount wagered, e.g., winning odds.

*Class I, Class II and Class III are legal terms in the context of the Indian Gaming Regulatory Act (IGRA), but as defined here are informal descriptions of the types of gaming that exist at Indian gaming establishments.

Sources: American Gaming Association; *The American Heritage® Dictionary of the English Language*, Fourth Edition; Christiansen Capital Advisors; Dunstan, Roger. *Gambling in California*. Jan. 1997; Indian Gaming Regulatory Act (IGRA); National Gambling Impact Study Commission *Final Report*; National Indian Gaming Commission; Nevada Gaming Control Board Regulation 29.



Glossary of Gaming Terms continued

Pari-mutuel: A system of betting on races or competitions whereby the winners divide the total amount bet, after management expenses have been deducted, in proportion to the sums they have wagered individually.

Player-banked Game: A game in which the player bets against other players; Class II games (e.g., bingo and pull tabs).

Pull-tabs: A game of chance in which a player opens perforated windows on a paper card, matching symbols on the card to win. Each group, referred to as a set, of pull-tabs has a unique prize structure; winners collect the prize that correlates to the specific pull-tab set.

Racetrack Casino, or Racino: A hybrid of a pari-mutuel venue — horse track, dog track or jai alai court — and a casino. Typically, the “casino” at a racino offers only slot machine games.

Random-number Generator: A mechanism inside the computer of a Class III game that ensures that each pull has an equal chance at hitting the jackpot.

Slot Machine: Any mechanical or electrical device in which outcomes are determined by a random number generator located inside the terminal.

Video Bingo: An electronic version of traditional bingo.

Video Lottery Terminal (VLT): An electronic game of chance played on a video terminal that is networked and can be monitored, controlled and audited by a central computer system. These games are authorized through the state lottery and considered by law to be lotteries, not commercial gaming.

Video Pull-tabs: An electronic version of paper pull-tabs.

Section Five: Industry Organizations and Events

Introduction

This section provides basic information on some of the commercial casino industry's prominent national organizations and events. It is not meant to provide an exhaustive list of all the organizations and events serving the commercial casino industry. *(See the contact pages in section six for brief entries on a selection of additional organizations.)*

AMERICAN GAMING ASSOCIATION (AGA)

The American Gaming Association (AGA) is the national trade association for the commercial casino segment of the gaming entertainment industry. The AGA's membership consists primarily of publicly held casino operator, manufacturer and supplier companies listed on the New York and NASDAQ stock exchanges.

Established in June 1995, the AGA's overall mission is to create a better understanding of the commercial casino industry by bringing facts about the industry to the general public, elected officials, other decision-makers and the media through education and advocacy. The AGA represents the commercial casino industry by addressing federal legislative and regulatory issues affecting its members and their employees and customers, such as federal taxation, regulatory issues, and travel and tourism matters.

Through its public education programs, including its highly successful Responsible Gaming National Education Campaign, the AGA aggressively promotes responsible gaming and works to increase awareness of disordered gambling. In 2003, the AGA and its members adopted the *AGA Code of Conduct for Responsible Gaming*, which represents a commitment to employees, patrons and the public to employ responsible gaming practices throughout the industry. *(See Responsible Gaming in section two.)* The association provides leadership in addressing newly emerging national issues and in developing industrywide programs on critical issues such as diversity and underage gambling.

Over the last decade, the AGA has served as the industry voice for both education and training, and as a primary source of information about the industry. The AGA continues to develop research-based best practices to guide industry efforts in all areas, including responsible gaming practices. The association serves as the industry's first national information clearinghouse, providing the media, elected officials, other decision-makers and the public with timely, accurate data on the gaming industry.

For more information, including a complete list of AGA members, visit the AGA Web site at www.americangaming.org. *(Basic company information and media contacts for the AGA and most of its member companies can be found in the contact pages in section six.)*



Industry Organizations and Events continued

NATIONAL CENTER FOR RESPONSIBLE GAMING (NCRG)

The National Center for Responsible Gaming (NCRG) is the only national organization exclusively devoted to the funding of peer-reviewed research on disordered gambling and to educating the public about responsible gaming. Founded in 1996 as a separate 501(c)3 charitable organization, the NCRG is the American Gaming Association's affiliated charity.

The NCRG's mission is to support peer-reviewed, scientific research into pathological gambling, and provide scientifically-based responsible gaming education and awareness programs to casino communities nationwide.

Since 1996, commercial casinos, gaming equipment manufacturers, vendors, related organizations and individuals have committed more than \$22 million to the NCRG, an unprecedented level of funding for disordered gambling research. The financial support provided by the NCRG has attracted the best minds from the most prestigious institutions in North America to the field of disordered gambling research. (A list of current NCRG donors is available at www.ncrg.org/funding/donors.cfm.)

NCRG-funded research always is based on rigorous scientific standards. NCRG-funded studies have resulted in the publication of more than 150 scholarly articles in highly competitive, peer-reviewed scientific journals. The NCRG has supported more than 30 research projects at more than 20 institutions including Boston University Medical School, Harvard University, Johns Hopkins University and McGill University in Canada.

In 2000, the NCRG awarded a \$2.4 million grant to establish the Institute for Research on Pathological Gambling and Related Disorders. At that time, the NCRG transferred all its research functions and grant evaluation and allocation processes to the Institute, further strengthening the firewall already in place between the gaming industry's monetary contributions and the decisions about which research projects would receive funding. In 2009, the organization was renamed the Institute for Research on Gambling Disorders.

The Institute supports large-scale grants for ongoing intramural research at NCRG Centers of Excellence at top-tier research institutions. It also supports competitively funded external research at educational, medical and research institutions worldwide. Modeled after the National Institutes of Health, the Institute has appointed an independent advisory board comprised of leading researchers in the field to review the scientific merits of research and grant proposals.

For a more complete look at results of some of the research funded by the NCRG and other research on pathological and youth gambling, turn to the Relevant Research section of this publication.

NCRG Programs and Resources

In addition to funding scientific research on disordered gambling, the NCRG supports translating scientific research into real-world, practical applications and has developed a number of research-based educational materials for casino employees and the general public.

In 2008, the NCRG released "Talking with Children about Gambling," a brochure designed to help parents and others who mentor youth deter children from gambling and other risky behaviors. The brochure was developed by the Institute for Research on Pathological Gambling and Related Disorders and includes information about the games young people play, the prevalence of gambling-related problems among youth and tips for parents on communicating about gambling.

To help ensure the general public has access to the latest available research about gambling, the NCRG has developed a series of publications called *Increasing the Odds: A Series Dedicated to Understanding*

Gambling Disorders. These monographs translate into lay terms the latest peer-reviewed scientific research on gambling. They include concise summaries of key studies and discuss their implications for future research and prevention efforts.

The NCRG's PEER (Partnership for Excellence in Education and Responsible Gaming) program provides gaming facilities with tools and resources to develop a comprehensive responsible gaming program. One of the highlights of the PEER program is EMERGE (Executive, Management & Employee Responsible Gaming Education), a Web-based responsible gaming training program for casino employees.

Visit www.ncrg.org for more information on the NCRG, the research it has supported and the resources it has developed.

NCRG Conference on Gambling and Addiction

Since 2000, the NCRG and the Institute have co-sponsored the annual NCRG Conference on Gambling and Addiction. The conference brings together researchers, clinicians, gaming industry executives, policy-makers and regulators to review science-based research and collaborate to better determine how research can be used to develop best practices for responsible gaming education and training, as well as treatment programs. For details on this year's conference, visit www.ncrg.org, or view summaries of last year's conference sessions on the conference blog at <http://ncrgconference.blogspot.com>.

GLOBAL GAMING EXPO (G2E)

Global Gaming Expo (G2E) is the world's largest gaming industry trade show and conference. A joint venture between the American Gaming Association and Reed Exhibitions, G2E brings together industry professionals from around the world, including leading casino operators, equipment manufacturers and suppliers. In addition to learning about the newest products and services, industry professionals have the opportunity to hear from experts about current policy and regulatory issues affecting the industry and to attend conference sessions on professional development topics and the latest industry trends.

Debuting in 2001, G2E became the first trade show and conference event created "by the industry, for the industry." With guidance from an advisory board of professionals who work in a variety of industry sectors, G2E organizers adjust the event's content each year to ensure it remains relevant and timely, encapsulating the current key issues in the gaming entertainment industry. On average, G2E annually attracts more than 30,000 individuals, including international participants from more than 100 countries.

For information and details about this year's G2E trade show and conference, visit www.globalgamingexpo.com.

G2E Asia

In June 2006, G2E acquired the Asian Gaming Expo from the Australasian Gaming Machine Manufacturers Association and renamed the event G2E Asia. Since its inception, G2E Asia has grown into the premier trade show and conference for the Asian gaming industry, with more than 8,000 attendees and exhibitors from around the world.

The event combines a comprehensive trade show with in-depth conference sessions featuring panels of industry experts, as well as one-of-a-kind networking opportunities, to provide a world-class business and educational forum for and about the Asian gaming industry.

For more information about G2E Asia visit www.G2EAsia.com.

Section Six: Contacts and Resources

National Associations and Organizations

**Media contact is organization head unless otherwise noted.*

AMERICAN GAMING ASSOCIATION (AGA)

President and CEO: Frank J. Fahrenkopf, Jr.

Headquarters: Washington, D.C.

www.americangaming.org

Media Contacts:

Holly Thomsen, Director of Communications

t. 202-552-2686

Brian Lehman, Communications Manager

t. 202-552-2680

ASSOCIATION OF GAMING EQUIPMENT MANUFACTURERS (AGEM)

Executive Director: Marcus Prater

Headquarters: Henderson, Nev.

www.agem.org

t. 702-812-6932

CENTER FOR GAMING RESEARCH, UNIVERSITY OF NEVADA, LAS VEGAS

Director: David G. Schwartz

Headquarters: Las Vegas, Nev.

<http://gaming.unlv.edu>

t. 702-895-2242

GAMING STANDARDS ASSOCIATION

Executive Director: Michelle Olesiejuk

Headquarters: Fremont, Calif.

www.gamingstandards.com

Media Contact:

Leslie Kefer, Marketing Project Manager

t. 510-492-4062

INSTITUTE FOR RESEARCH ON GAMBLING DISORDERS

Executive Director: Christine Reilly

Headquarters: Beverly, Mass.

www.gamblingdisorders.org

t. 978-299-3040

INSTITUTE FOR THE STUDY OF GAMBLING AND COMMERCIAL GAMING, UNIVERSITY OF NEVADA, RENO

Director: William R. Eadington, Ph.D.

Headquarters: Reno, Nev.

www.unr.edu/gaming

t. 775-784-1442

INTERNATIONAL ASSOCIATION OF GAMING ADVISORS

Executive Director: Kerry Koenig

Headquarters: Las Vegas, Nev.

www.theiaga.org

t. 702-355-4512

INTERNATIONAL ASSOCIATION OF GAMING REGULATORS (IAGR)

Chairman: André Wilsenach

www.iagr.org

Media Contact:

Susan Hensel

Secretary

t. 717-346-8300

INTERNATIONAL GAMING INSTITUTE, UNIVERSITY OF NEVADA, LAS VEGAS

Executive Director: Patricia Becker, J.D.

Headquarters: Las Vegas, Nev.

<http://igi.unlv.edu>

Media Contact:

Gian Galassi, Sr. Public Affairs Specialist

t. 702-895-3104

NATIONAL CENTER FOR RESPONSIBLE GAMING (NCRG)

Chairman: Glenn Christenson

Headquarters: Washington, D.C.

www.ncrg.org

Media Contact:

Veronica Brown

t. 202-530-4526

State Associations

**Media contact is organization head unless otherwise noted.*

COLORADO GAMING ASSOCIATION

Executive Director: Lois A. Rice
Headquarters: Denver, Colo.
www.coloradogaming.com
t. 303-237-5480

ILLINOIS CASINO GAMING ASSOCIATION

Executive Director: Tom Swaik
Headquarters: Springfield, Ill.
www.illinoiscasinogaming.org
t. 217-546-0945

CASINO ASSOCIATION OF INDIANA

Executive Director: Mike Smith
Headquarters: Indianapolis, Ind.
www.casinoassociation.org
t. 317-231-7030

IOWA GAMING ASSOCIATION

President: Wes Ehrecke
Headquarters: West Des Moines, Iowa
www.iowagaming.org
t. 515-267-9200

LOUISIANA CASINO ASSOCIATION

Executive Director: Wade Duty
Headquarters: Baton Rouge, La.
www.casinosoflouisiana.com
t. 225-344-0037

REGULATORY MANAGEMENT COUNSELORS*

Consultant: Robert Russell
Headquarters: East Lansing, MI
www.rmcllegal.com
t. 517-507-3858

MISSISSIPPI CASINO OPERATORS ASSOCIATION

Executive Director: Beverly Martin
Headquarters: Biloxi, Miss.
t. 228-388-0087

MISSOURI GAMING ASSOCIATION

Executive Director: Mike Winter
Headquarters: Jefferson City, Mo.
www.missouricasinos.org
t. 573-634-4001

NEVADA RESORT ASSOCIATION

President: Bill Bible
Headquarters: Las Vegas, Nev.
www.nevadaresorts.org
t. 702-735-4888

CASINO ASSOCIATION OF NEW JERSEY

President: Joseph A. Corbo (also General Counsel,
Borgata Hotel Casino & Spa)
Headquarters: Atlantic City, N.J.
Media Contact:
Noel Stevenson
Director of Media Relations
t. 609-317-7380

DEADWOOD GAMING ASSOCIATION

Director: Vicki Johnson
Headquarters: Deadwood, S.D.
t. 605-578-1876

**There is no official state association in Michigan, but Robert Russell, consultant with Regulatory Management Counselors, is an excellent contact to answer questions about the commercial casino industry in Michigan.*

Contacts and Resources continued

Casino Operators and Equipment Manufacturers

AMERISTAR CASINOS, INC.

CEO and Vice Chairman: Gordon R. Kanofsky

Headquarters: Las Vegas, Nev.

www.ameristar.com

Media Contact:

Rebecca Theim, Vice President of Communications
t. 702-567-7053

ARISTOCRAT TECHNOLOGIES, INC.

President, Americas: Nick Khin

Headquarters: Las Vegas, Nev.

www.aristocratgaming.com

Media Contact:

Joanna Enrique, Advertising and Promotions
Manager
t. 702-270-1458

ATRONIC AMERICAS, LLC

COO: Ken Bossingham

Headquarters: Las Vegas, Nev.

www.atronic.com

Media Contact:

Marco Bertolin, Senior Marketing Manager
t. 506-870-1384

BALLY TECHNOLOGIES, INC.

President, CEO and Director: Richard Haddrill

Headquarters: Las Vegas, Nev.

www.ballytech.com

Media Contact:

Laura Olson-Reyes, Director of Corporate
Communications
t. 702-584-7742

BOYD GAMING CORPORATION

President and CEO: Keith Smith

Headquarters: Las Vegas, Nev.

www.boydgaming.com

Media Contact:

Rob Stillwell, Vice President of Corporate
Communications
t. 702-792-7353

COLONY CAPITAL, LLC

Founder, Chairman and CEO: Thomas J. Barrack, Jr.

Headquarters: Los Angeles, Calif.

www.colonyinc.com

Media Contact:

Owen Blicksilver
t. 516-742-5950

HARRAH'S ENTERTAINMENT, INC.

Chairman, CEO and President: Gary Loveman

Headquarters: Las Vegas, Nev.

www.harrahs.com

Media Contact:

Marybel Batjer, Vice President, Public Policy and
Communications
t. 702-880-4710

INTERNATIONAL GAME TECHNOLOGY (IGT)

Chairman and CEO: Thomas J. Matthews

Headquarters: Las Vegas, Nev.

www.igt.com

Media Contact:

Ed Rogich, Vice President, Marketing
t. 702-669-8777

ISLE OF CAPRI CASINOS, INC.

President and COO: Virginia McDowell

Headquarters: St. Louis, Mo.

www.isleofcapricasinos.com

Media Contact:

Jill Haynes, Director of Corporate Communications
t. 314-813-9368

JCM AMERICAN CORPORATION

President: Aki Isoi

Headquarters: Las Vegas, Nev.

www.jcm-american.com

Media Contact:

Paul Speirs
t. 702-413-4278

KONAMI GAMING, INC.

Chairman and CEO: Satoshi Sakamoto

Headquarters: Las Vegas, Nev.

www.konamigaming.com

Media Contact:

Leah Steinhardt, Marketing Manager
t. 702-616-1400

LAS VEGAS SANDS CORP.

Chairman and CEO: Sheldon Adelson

Headquarters: Las Vegas, Nev.

www.lasvegassands.com

Media Contact:

Ron Reese, Vice President of Communications

t. 702-414-3607

MGM MIRAGE

Chairman and CEO: James J. Murren

Headquarters: Las Vegas, Nev.

www.mgmmirage.com

Media Contact:

Alan Feldman, Senior Vice President

of Public Affairs

t. 702-650-6947

PENINSULA GAMING COMPANY, LLC

CEO: Brent Stevens

Headquarters: Dubuque, Iowa

www.diamondjo.com

Media Contact:

Carrie Tedore, Director of Public Relations

t. 563-590-9342

PENN NATIONAL GAMING, INC.

Chairman and CEO: Peter M. Carlino

Headquarters: Wyomissing, Pa.

www.pngaming.com

Media Contact:

Eric Schippers, Vice President of Public Affairs

t. 610-378-8321

PINNACLE ENTERTAINMENT, INC.

Chairman and CEO: Daniel R. Lee

Headquarters: Las Vegas, Nev.

www.pnkinc.com

Media Contact:

James W. Barich, Senior Vice President, Public Affairs

t. 949-250-3166

SHUFFLE MASTER, INC.

CEO: Tim J. Parrott

Headquarters: Las Vegas, Nev.

www.shufflemaster.com

Media Contact:

Kirsten Clark, Vice President of Worldwide Marketing

t. 702-897-7150

STATION CASINOS, INC.

Chairman and CEO: Frank Fertitta, III

Headquarters: Las Vegas, Nev.

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Casino Journal

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Gaming & Leisure

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Gaming Industry Observer

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Gaming Law Review and Economics

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publication.aspx?pub_id=16
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Gaming Research & Review Journal

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Gaming Today

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Global Gaming Business

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Indian Gaming Business

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Indian Gaming Magazine

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International Gaming & Wagering Business

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Journal of Gambling Studies

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