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MARYLAND

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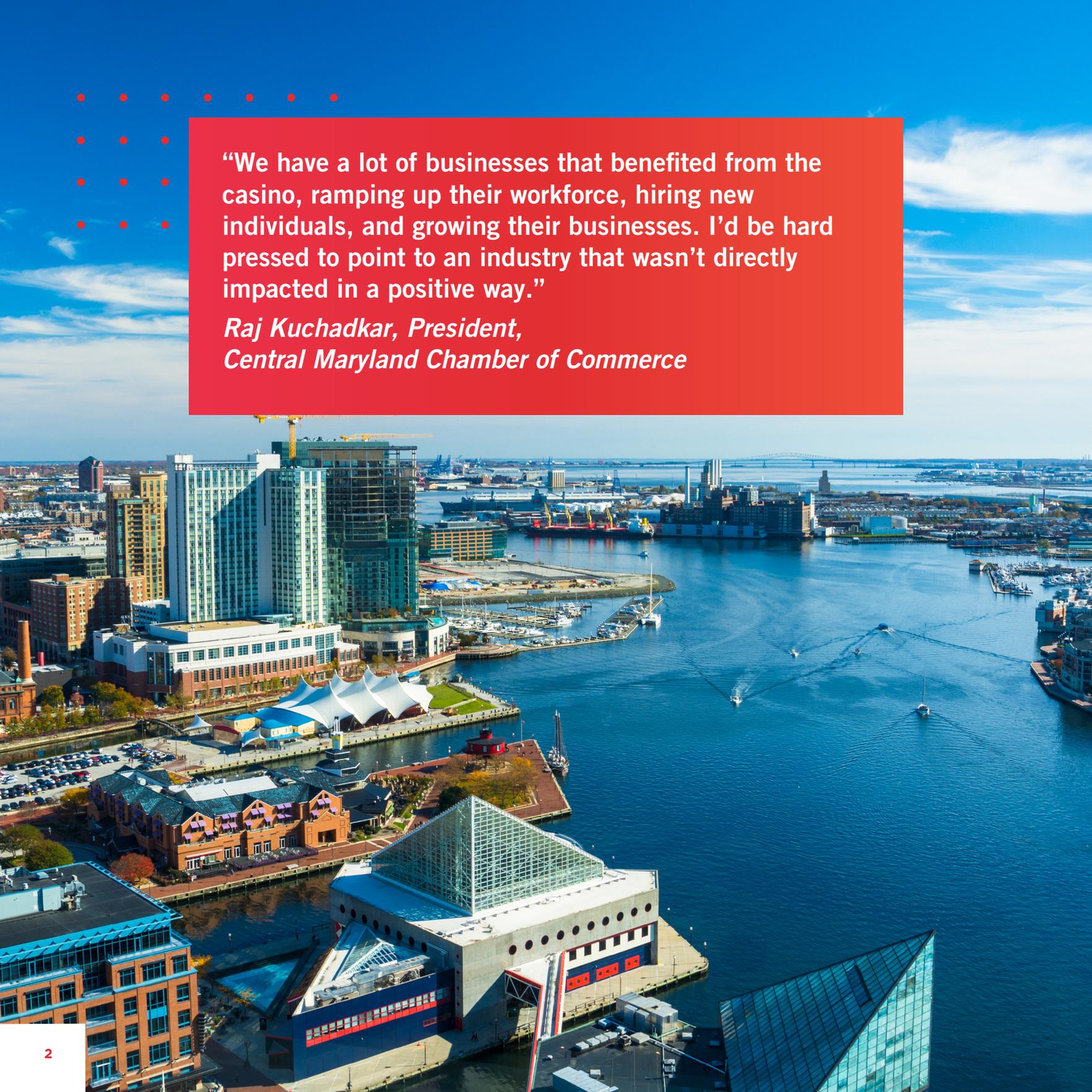
Casinos &
Communities



AMERICAN
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GET TO
KNOW
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An aerial photograph of a waterfront city, likely Baltimore, Maryland. The image shows a mix of modern high-rise buildings and older structures. A large body of water, the harbor, is visible with several boats and a bridge in the distance. The sky is blue with some clouds. A red text box is overlaid on the top left of the image.

“We have a lot of businesses that benefited from the casino, ramping up their workforce, hiring new individuals, and growing their businesses. I’d be hard pressed to point to an industry that wasn’t directly impacted in a positive way.”

***Raj Kuchadkar, President,
Central Maryland Chamber of Commerce***

Gaming in Maryland by the Numbers

6

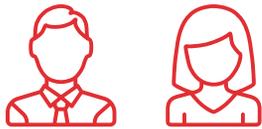
commercial casinos
and racinos

\$962

million
generated in taxes

\$3

billion
in total economic impact



15,364

jobs supported



\$713

million
in supported wages



“[Golden Entertainment’s Rocky Gap Casino] is providing good jobs to area residents and it’s brought in direct dollars that we’re able to put back right into the community.”

*Jason Bennett, Director of Finance,
Allegany County*

The History of Gaming in Maryland



2008

Marylanders approve a constitutional amendment allowing five casinos to offer slot machines

2010

The first casino in the state begins operating in **Cecil County**

**2011-
2014**

Four more casinos open in **Baltimore City, Worcester, Anne Arundel and Allegany counties**

2012

Voters pass a gaming expansion authorizing table games across Maryland and a casino in **Prince George's County**

2016

The Prince George's County casino opens, becoming the sixth casino in the state

2017

Gaming generates **\$3 billion** for Maryland's economy

Maryland's Education Trust Fund allocates gaming tax revenue to early education services, public elementary and secondary education, public school construction and capital improvement projects. Since 2010, Maryland casinos have contributed more than \$3 billion to the fund, including an all-time high \$540 million in fiscal year 2019.

Empowering Small-, Minority- and Women-Owned Business

Maryland's thriving casino industry is helping thousands of families, businesses and communities across the Free State to thrive. The Greater Baltimore-Washington D.C. commercial gaming market – home to world-class casino and resort destinations – is now the fourth largest in the United States. In 2018, it was again among the fastest-growing major casino markets and gaming revenue has more than tripled since 2011, sparking economic growth that extends across the state.

Cristina Tufts, proprietor of Harbor Wines, is one small business owner who has benefited from her proximity to the casino industry. As an immigrant and a military spouse, Tufts was having a hard time finding work, but with a passion for wine, she began importing it from her native country of Moldova. When MGM Resorts International opened MGM National Harbor in Tufts' neighborhood, she spotted an opportunity and was able to win work supplying the new property. "If it wasn't for MGM, I would have to work ten times as hard to have the same numbers to show for my company," said Tufts. Today, she has expanded to doing business with Caesars Entertainment's Horseshoe Casino Baltimore and The Cordish Companies' Live! Casino & Hotel, become a certified Level 1 sommelier with the support of MGM's wine director and learned about social media marketing and purchasing through the MGM Mentors Protégé program. She is currently looking to buy a warehouse and soon hopes to hire her first employees. "MGM has really, really changed my life," said Tufts.

Stories like Tuft's are common in Maryland because casinos "give small, regional businesses the opportunity to build relationships with national corporations that they might not otherwise have," explained Alison Tavik, director of communications at the Governor's Office of Small, Minority & Women Business Affairs. Gerald Stinnett, the office's minority business enterprise compliance manager, agreed, "What I've found is once a vendor does a good job with one casino, others want to bring them on, and that just opens it up for more."

That was the case for Jeff Hargrave, CEO of Mahogany, a minority-owned construction company in Baltimore whose business with the casino industry accounted for nearly a third of his sales last year. Mahogany's first casino job was to provide all the interior finishes for Live! Casino & Hotel, and the

company has since won additional business from Horseshoe Casino Baltimore and MGM National Harbor. "We even built up a connection in China through Horseshoe Casino...Working with the casino industry really opens up a lot of doors to people you might not have dealt with if it wasn't for those type of projects," said Hargrave.



“We need business owners working with and trying to help the community. I believe casinos do that. I know MGM does it. I know Horseshoe does it. I know Live! does it.”

*Jeff Hargrave, CEO,
Mahogany, a Baltimore-based construction company*

Commitment to Responsible Gaming

Responsibility is an everyday commitment of the American gaming industry that starts with providing an exciting entertainment experience supported by sound consumer protections. Maryland is no exception to that commitment. While casinos pay annual assessments that help fund state responsible gaming programs, totaling more than \$5 million in fiscal year 2018, it is only a fraction of the industry's total commitment to responsible gaming.

In December 2017, MGM Resorts International integrated GameSense, a proactive responsible gaming program, at MGM National Harbor and other properties. Rooted in enhanced customer service, player education and leading research, GameSense educates employees on strategies for intervening with patrons long before problems might start. It is designed “to make sure that [customers] are gambling within a budget, that they understand how games work and that when it stops being fun, you need to stop,” explained Patrick Martin, vice president of regional compliance at MGM Resorts International. Between the implementation of GameSense and August 2019, there were nearly 40,000 program interactions at MGM National Harbor and more than one million across the company.

Even with the impressive reach of the industry's efforts, casino properties are constantly evolving their responsible gaming measures. At Live! Casino & Hotel, Director of Compliance Charles Dwaileebe and his team review their responsible gaming plan annually. “We update it, we look at things that are working, things that aren't working and we try to improve the process.”

100% of AGA member companies have a responsible gaming policy.

American Gaming Association research shows that measures taken by the industry to educate patrons and employees are working:

- **Nine-in-10 gamblers set a budget before they visit a casino**
- **Ninety percent of those customers report in tracking their spending**
- **Eight-in-10 gamblers are aware of responsible gaming resources**

In addition to individual programs and policies, Maryland casinos are working together as part of the Maryland Alliance on Responsible Gaming. This statewide partnership convenes representatives from the six casinos with various stakeholders for quarterly discussions to coordinate and maximize resources to address responsible gaming in Maryland. “It's a good way to see what the other casinos are doing well, take ideas and run with them,” said Dwaileebe. “I think that a lot of the content from those meetings are great resources to implement into the training.”

Maryland casinos are also partnering with the Maryland Center on Excellence on Problem Gambling, a program of the University of Maryland School of Medicine that promotes healthy and informed gaming choices. Mary Drexler, the Center's program director, is in regular contact with senior casino staff throughout the year, offering employee training sessions and collaborating during National Problem Gambling Awareness Month. “We're usually willing to talk about any issues that arise regarding responsible gambling. I think we're ahead of the game in a lot of ways here in Maryland,” Drexler said.

“It doesn't behoove the casino to have a customer who's getting in more and more trouble. And so, it behooves both the casino or their patron and us to get them the help they need and to be preventive.”

*Mary Drexler, Program Director,
Maryland Center on Excellence on Problem Gambling*

Strengthening Maryland Communities

For the casino industry, responsibility does not stop at the casino door, but it extends far beyond. It means creating career opportunities, providing diverse and inclusive workplaces and enhancing the quality of life in communities where casinos operate. This has been especially noticeable in Allegany County, where Jason Bennett, the county's director of finance, remembers a time when "we watched industries leave, one by one." At the time, the property now occupied by Golden Entertainment's Rocky Gap Casino operated as a failing convention center, leaving hundreds of jobs at risk. Transforming the building into a casino fortified these jobs and boosted the local tourism economy, providing sustainable career opportunities to Marylanders of all educational backgrounds. As Michele Walker, resource development manager at County United Way, sees it, "Rocky Gap's been nothing but a good neighbor to us."

In National Harbor, the health of the local economy was similarly "in the tank," according to Rushern Baker III, a former Prince George's County executive. That all changed as MGM National Harbor became a catalyst that brought other industries to the area. "Now we have the jobs, individuals work in the casino, but you also have contracts that support it," said Baker. Looking back at eight years as county executive, Baker remembers it as the best working relationship he had with any major corporation. "MGM has had the greatest impact on the economy here of any single industry outside of the federal government."



“Horseshoe Casino is not just putting lip service into the idea of community development and wanting to be a good partner, but has genuinely been there at the table. We have a very good relationship, and if I have a need or a concern, I know that I can call.”

*Brad Rogers, Executive Director,
South Baltimore Gateway Partnership*

State Senator Pam Beidle, who represents Live! Casino & Hotel's district, explained how the tax revenue is making an impact for Hanover: "A lot of the money goes to county services. We've added a bay to the firehouse and added a paramedic unit. We've redone the library. We built a new stadium at the local high school. It goes to increased police protection, improved roads and shuttles. It's used to improve the parks." Beyond the support for public services, Raj Kuchadkar, president of the Central Maryland Chamber of Commerce, has seen the value of Live! Casino & Hotel's charitable work in his community, from support to combat the local opioid epidemic, to mobile food vans that feed the homeless and donations that made possible a new center that is designed to aid children of fallen members of the military. "[Casinos] provide direct support to the community, whether it's a nonprofit, a religious group or a government," said Kuchadkar.



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