

CASINO INDUSTRY EMPLOYEE SURVEY



HOW THE MEN AND WOMEN OF
GAMING VIEW THEIR JOBS
AND THE INDUSTRY

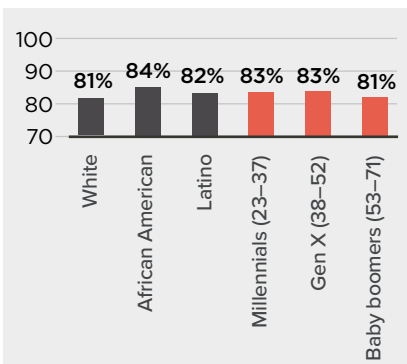
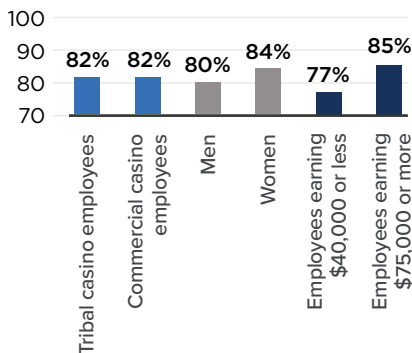
The men and women who work in the U.S. casino industry are the lifeblood of a growing and vital segment of our nation's economy. More than 750,000 people work at more than 1,000 casino properties in 40 states, providing first-class customer service and unforgettable experiences to tens of millions of visitors each year. Through careers in gaming, they raise families, pay tuitions and mortgages, and contribute their time and money to make the communities they call home better places to live and work.

A recently conducted survey, with nearly 600 casino employees who work in a wide variety of positions within the gaming sector, thoroughly explores their views and attitudes about their jobs and the casino industry more broadly. Engaging a nationally representative sample of casino workers, the results of the study represent a cross section of employees from both commercial and tribal casinos.

OVERALL JOB SATISFACTION IS HIGH

Survey results show that the vast majority of casino industry employees have exceedingly favorable views of their jobs and their workplaces. At the most fundamental level, more than eight-in-ten (82%) report they are satisfied with their jobs, including more than one-third (34%) who are "completely satisfied." Conversely, only a fraction (17%) say they are dissatisfied working in gaming today.

While opinions on job satisfaction are impressively high, the extent to which this positive sentiment is shared by almost every identifiable subgroup within the casino industry workforce is also noteworthy and significant.



DRIVERS OF EMPLOYEE SATISFACTION

When asked more specifically about which aspects of their jobs most contribute to their overall fulfillment in the workplace, one striking takeaway is just how diverse employees' sources of satisfaction are. In short, respondents think highly of their jobs in

many different ways, and when taken together, this positive thinking creates a critical mass of professionals who truly enjoy and are enthused by what they do. That said, the survey did uncover a number of key themes driving employee satisfaction.

It's About the People

Almost universally, one aspect of their jobs that employees value highly is their interaction with colleagues and customers.

"How well does each statement describe your personal experience working in the casino industry?"

Very well OR Somewhat well



I enjoy the people I work with

Female employees (92%) and those with household incomes less than \$75,000 per year (93%) are especially happy to be able to work with their existing colleagues.



I enjoy working with the public and customers

Baby boomer-aged employees (53-71 years old) get particular enjoyment from interacting with customers and patrons through their work (89%), as do employees located in Nevada (86%).

Satisfaction Goes Beyond Good Pay and Benefits

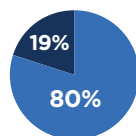
While a substantial majority of casino employees surveyed say they receive good pay (75%) and good benefits (74%), an even greater number voice appreciation for some of the less tangible and quantifiable aspects of their work lives. Many note that being treated well by their company, working in a fun industry, being able to make use of their skills and training, and striking a good work/life balance have contributed significantly to their happiness at work.

"How well does each statement describe your personal experience working in the casino industry?"

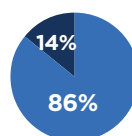
Very well OR Somewhat well

Not that well OR Not well at all

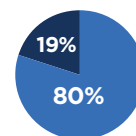
I am treated well by my company



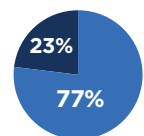
It is a fun industry to work in



My work allows me to use my skills and training



It allows for good work/life balance



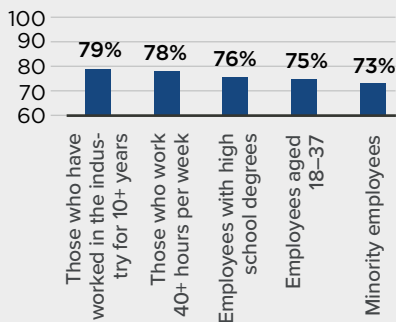
¹ Gaming Means (Small) Business: How Casinos Boost Local Economies, American Gaming Association, 2017, pg. 3.

WORK IN GAMING HELPS EMPLOYEES ACHIEVE LIFE GOALS

Regardless of the industry in which someone works, feelings about professional fulfillment and success are deeply intertwined with how well they believe they are doing in achieving life goals outside the workplace. The results from our survey underscore this exact point—**employee satisfaction is exceptionally high because they appreciate the fact the industry has allowed them to better their personal and families' lives in a multitude of ways.**

Achieving the American Dream

Nearly three-quarters of all employees (71%) say their job in the casino industry is helping them achieve the American dream.



Reaching Life Goals

While life goals are clearly specific to each individual, common themes are widespread, such as saving for retirement, paying down debt, owning a home, and growing both personally and professionally.



PRIDE IN THEIR WORK, APPRECIATION OF INDUSTRY’S CORPORATE CITIZENSHIP

Another set of key takeaways uncovered by this study are the unmistakable pride employees express about their work and the appreciation they have for the way companies in the industry operate.

In fact, nearly 8-in-10 employees (78%) directly say they “feel proud to work in the casino industry.” Equally impressive, an even greater number (80%) feel so positive about their work in gaming that they would recommend the industry to a friend looking for a job.

Employees’ pride in their jobs goes hand-in-hand with how they feel about the companies for whom they work,

and by a sizeable margin, respondents report that on various levels, their employers are good corporate citizens. For example, 86 percent of employees think their employers take the issue of responsible gaming seriously and are committed to helping customers play responsibly.

Employees are attuned to, and in many cases involved with, what companies are doing outside their properties as well. Many of them have seen firsthand the industry’s widespread commitment to environmental sustainability, philanthropy, and volunteering.

8-in-10 employees are proud to work in the casino industry



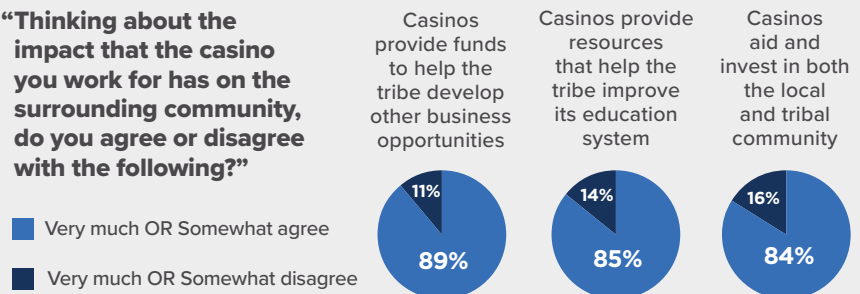
“How committed do you think the industry is in dealing with the following issues?”



FINDINGS AMONG TRIBAL CASINO EMPLOYEES

While the commercial and tribal casino sectors share much in common, Native American casinos and the communities in which they are located are also unique in important respects. As a result of this, some questions in the survey were asked solely of tribal casino employees. Findings show these workers’ views about the role casinos have played in their communities are decidedly positive on a number of different levels.

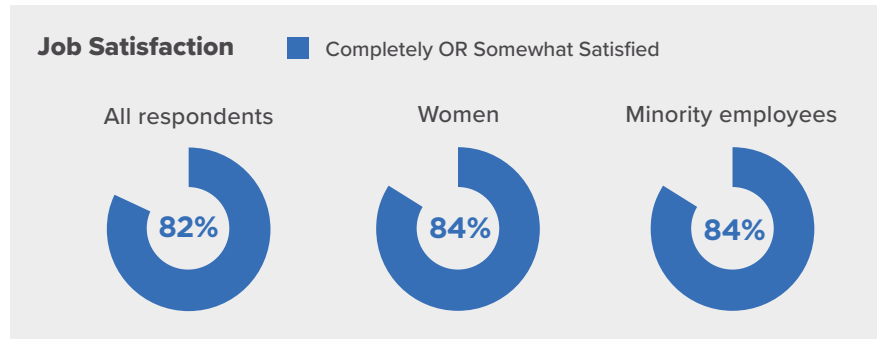
“Thinking about the impact that the casino you work for has on the surrounding community, do you agree or disagree with the following?”



A SNAPSHOT OF FEMALE AND MINORITY EMPLOYEES

While there are a number of subgroups within the overall survey universe that are particularly upbeat about their work in the industry, women and minorities stand out as being especially positive in this regard. Additionally, women and minority employees voice more favorable opinions with respect to the industry's corporate citizenship and impact on its host communities.

Female and Minority Employees' Attitudes: Standing Out From the Crowd



Whether looking at job satisfaction, the inclusivity and diversity of the workforce, or casinos' community impacts, on all fronts, women and minorities are disproportionately more favorable toward casinos' impacts.

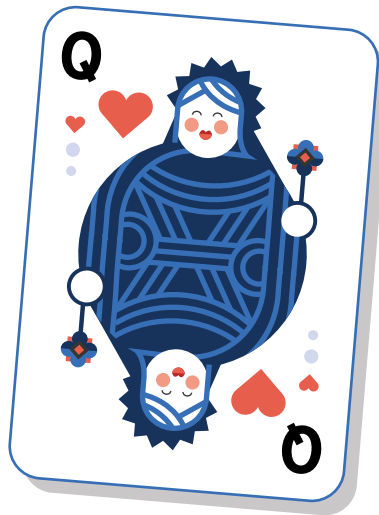
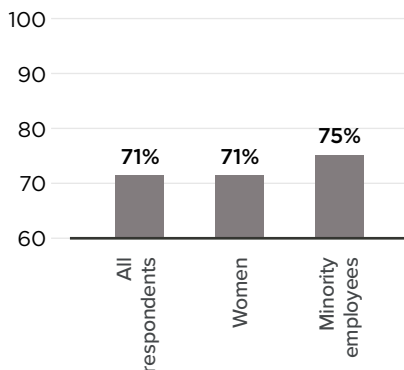
Workplace Experience

Describes your personal experience working in the industry very or somewhat well

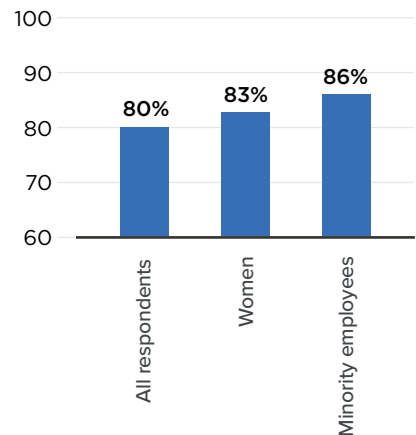
Upward Mobility and Diversity

Very/Somewhat Accurate

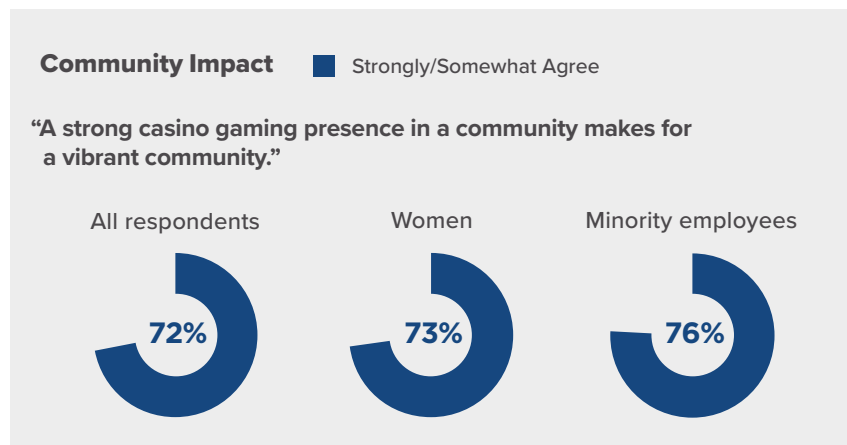
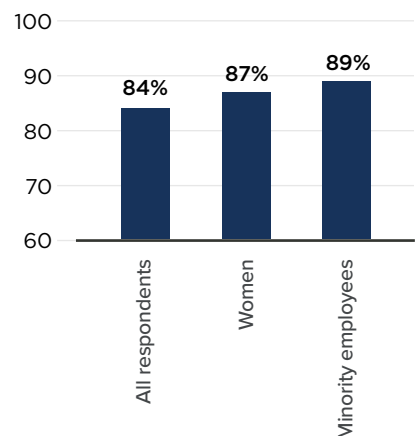
"Provides opportunities for advancement for members of its workforce at all levels."



"I am treated well by my company."

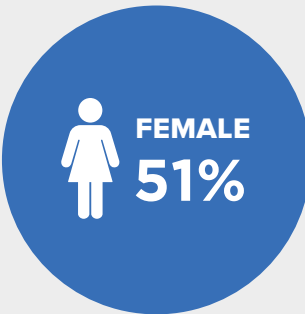
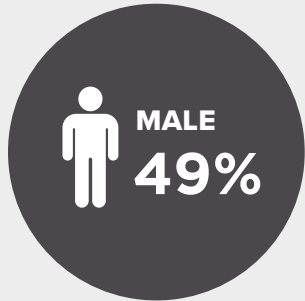


"I feel safe in my work environment."



PROFILE OF INDUSTRY EMPLOYEES SAMPLE

Sex



Current Job Type

Food/Beverage	14%
Dealer	14%
Supervisors	11%
Corporate/Front office	11%
Cashier	7%
Reservations/Front desk	5%
Maintenance/Tech./Engineer	5%
Housekeeping/Custodial	5%
Gaming Engineer	5%
Security	3%
Bellmen/Porter/Steward	2%
Other	18%

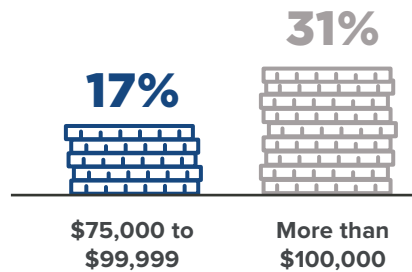
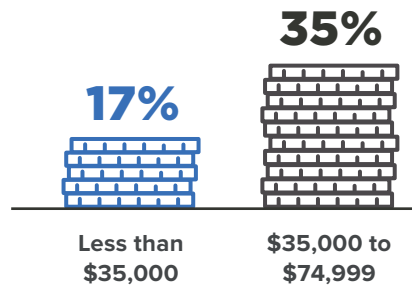
Educational Attainment

High school graduate or less **15%**

Some college/vocational **39%**

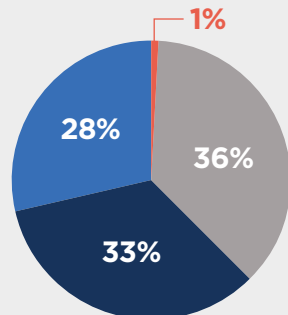
College graduate or post grad. **34%**

Household Income



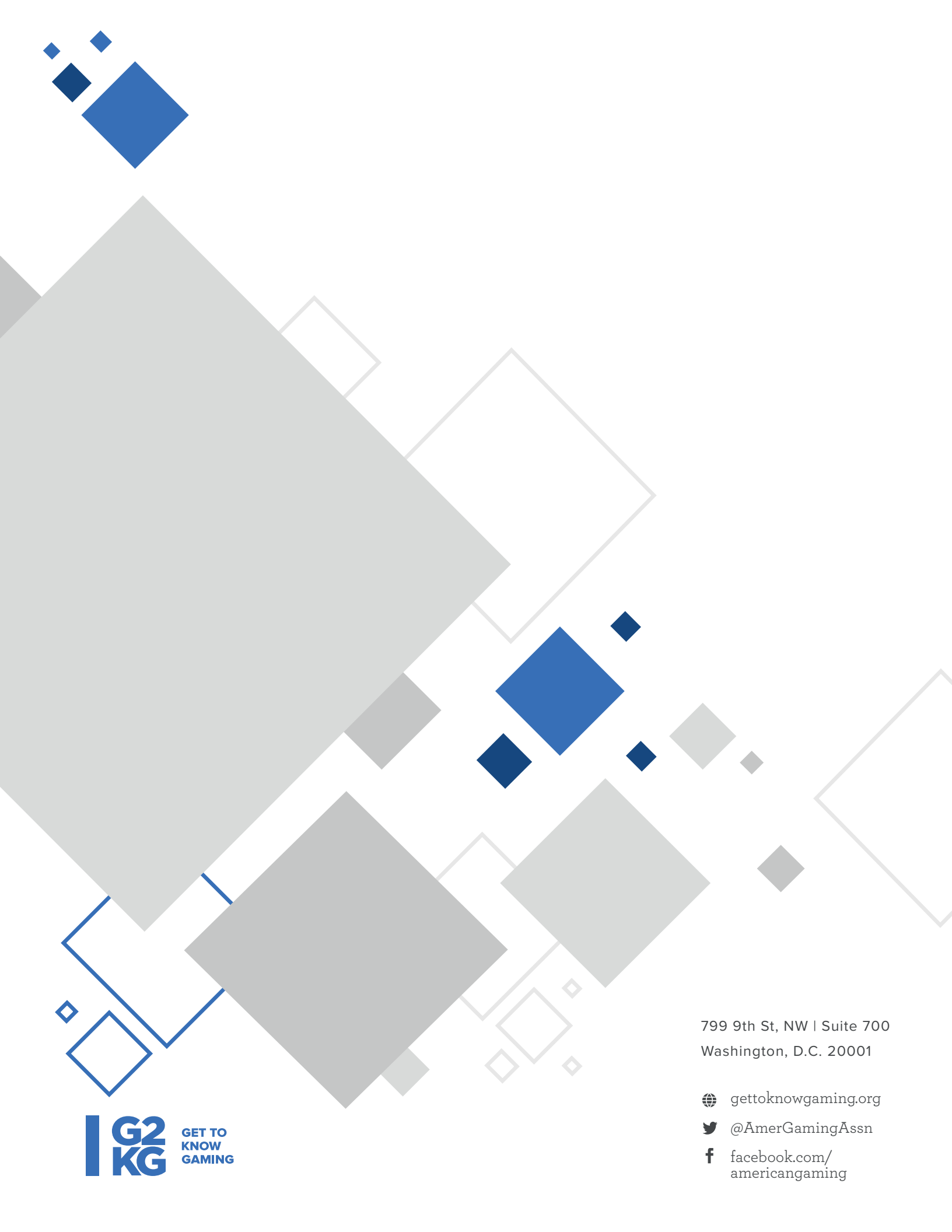
Age

Gen Z 18-22 | Millennials 23-37
Gen X 38-52 | Baby boomers 53-71



State of Residence

Nevada	43%
Florida	7%
California	6%
Ohio	5%
Wisconsin	5%
New York	4%
Pennsylvania	4%
Michigan	4%
Louisiana	3%
Missouri	2%
Oklahoma	2%
Maryland	2%
Mississippi	2%
Arizona	2%
Illinois	1%
Minnesota	1%
Kansas	1%
Kentucky	1%
Texas	1%
New Mexico	1%
New Jersey	1%
Idaho	1%
Colorado	1%
Washington	1%
Maine, Connecticut, Indiana, West Virginia, Georgia, Montana, Oregon, Alaska, Massachusetts, North Dakota, Delaware, Alabama and Arkansas	<1% each



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