

Responsibility in Gaming and American Attitudes Toward the Casino Industry

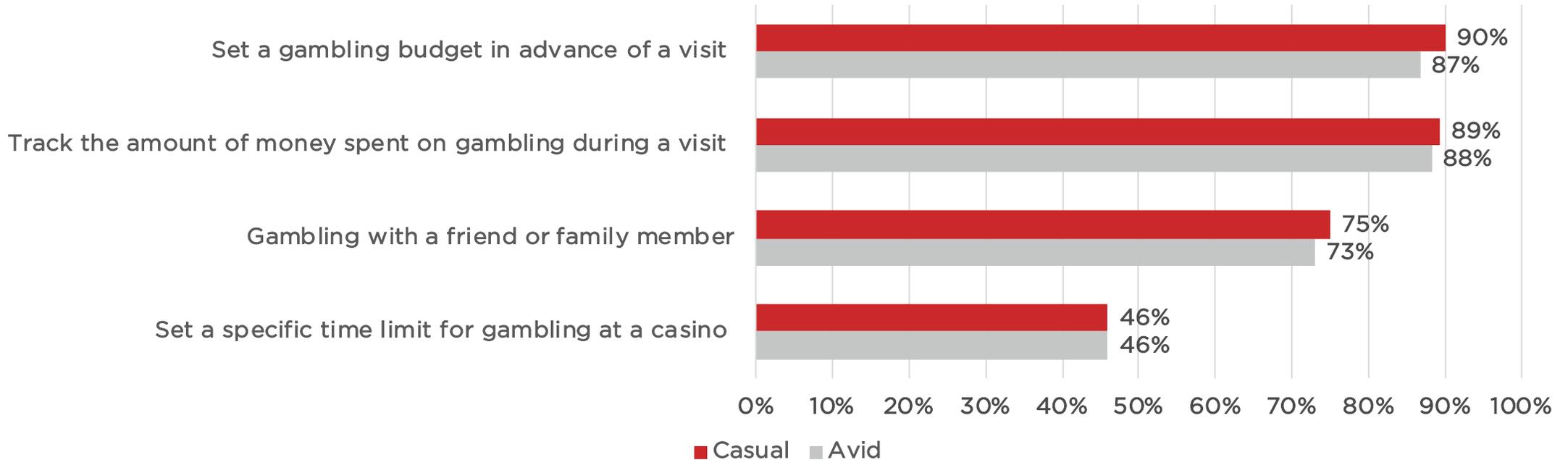
- 9 in 10 casual gamblers set a budget before they visit a casino;
- 90 percent of those gamblers report success in tracking their spending; and
- 8 in 10 casual gamblers and 9 in 10 avid gamblers are aware of responsible gaming resources.
- 88 percent of American adults view gambling as an acceptable form of entertainment;
- 80 percent of people say the gaming industry is a job creator; and
- 6 in 10 Americans believe casinos help their local economies.

Casual gamblers: Casino visitors who have gambled at a US casino between 1 and 9 times in the past 12 months

Avid gamblers: Casino visitors who have gambled at a US casino 10 or more times in the past 12 months

9 IN 10 CASUAL, AVID GAMBLERS SET BUDGET IN ADVANCE OF VISITING A CASINO

Behaviors Associated With Going To A Casino - TOP 2 BOX SCORE*



*The Top 2 Box Score reflects the percentage of respondents who selected either 'Usually' or 'Always' on a five point scale, which included the following options to choose from: 'Never', 'Rarely', 'Sometimes', 'Usually' and 'Always'.

Question: How often do you do each of the following when you go to a casino to gamble?

BASE: (Casual: N = 1003; Avid: N = 1011; Total: N = 2014)

TYPICAL DAILY GAMBLING BUDGET

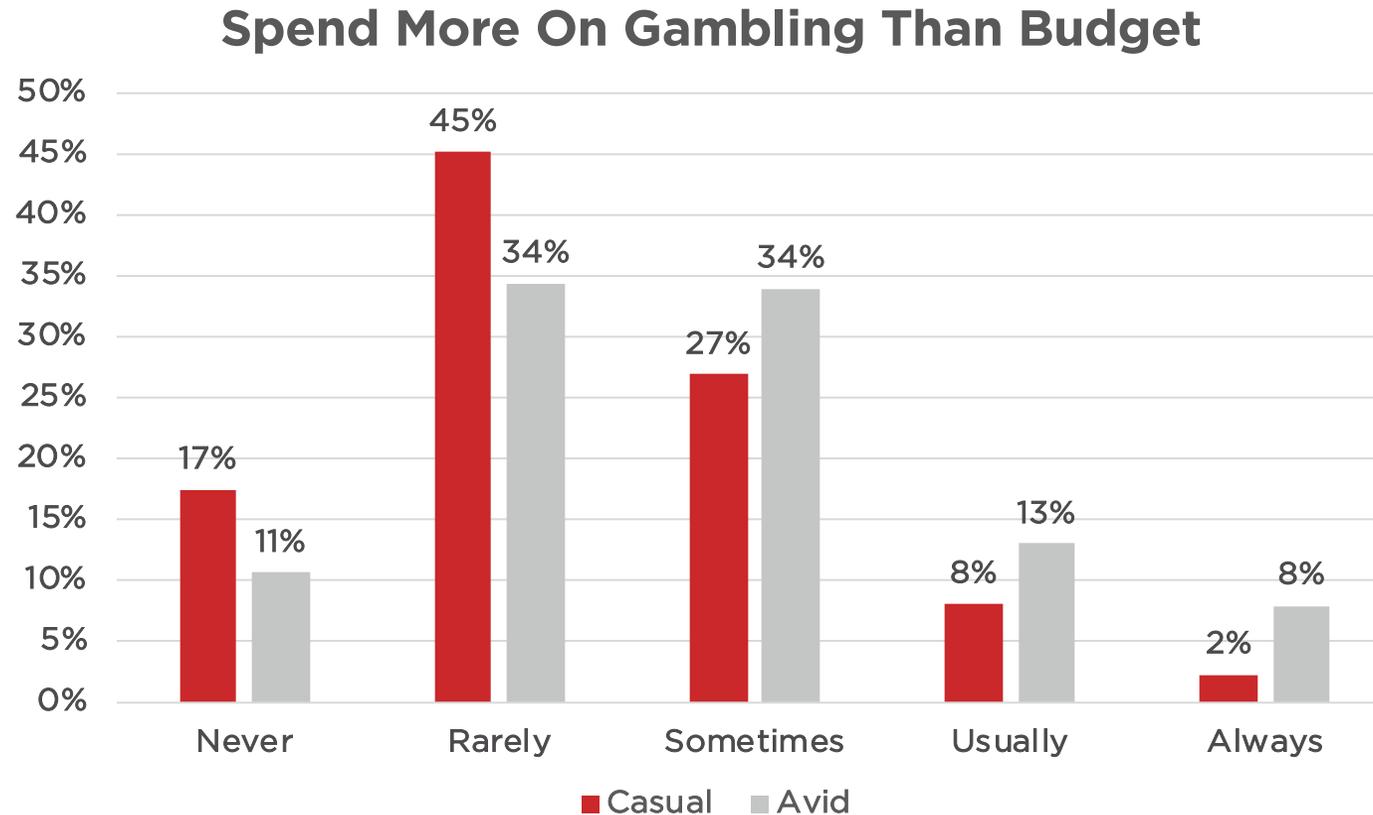


Question: What is your typical daily gambling budget?

This question was only asked of respondents who indicated 'always', 'usually' or 'sometimes' setting a gambling budget in advance of a visit.

BASE: (Casual: N = 985; Avid: N = 977; Total: N = 1962)

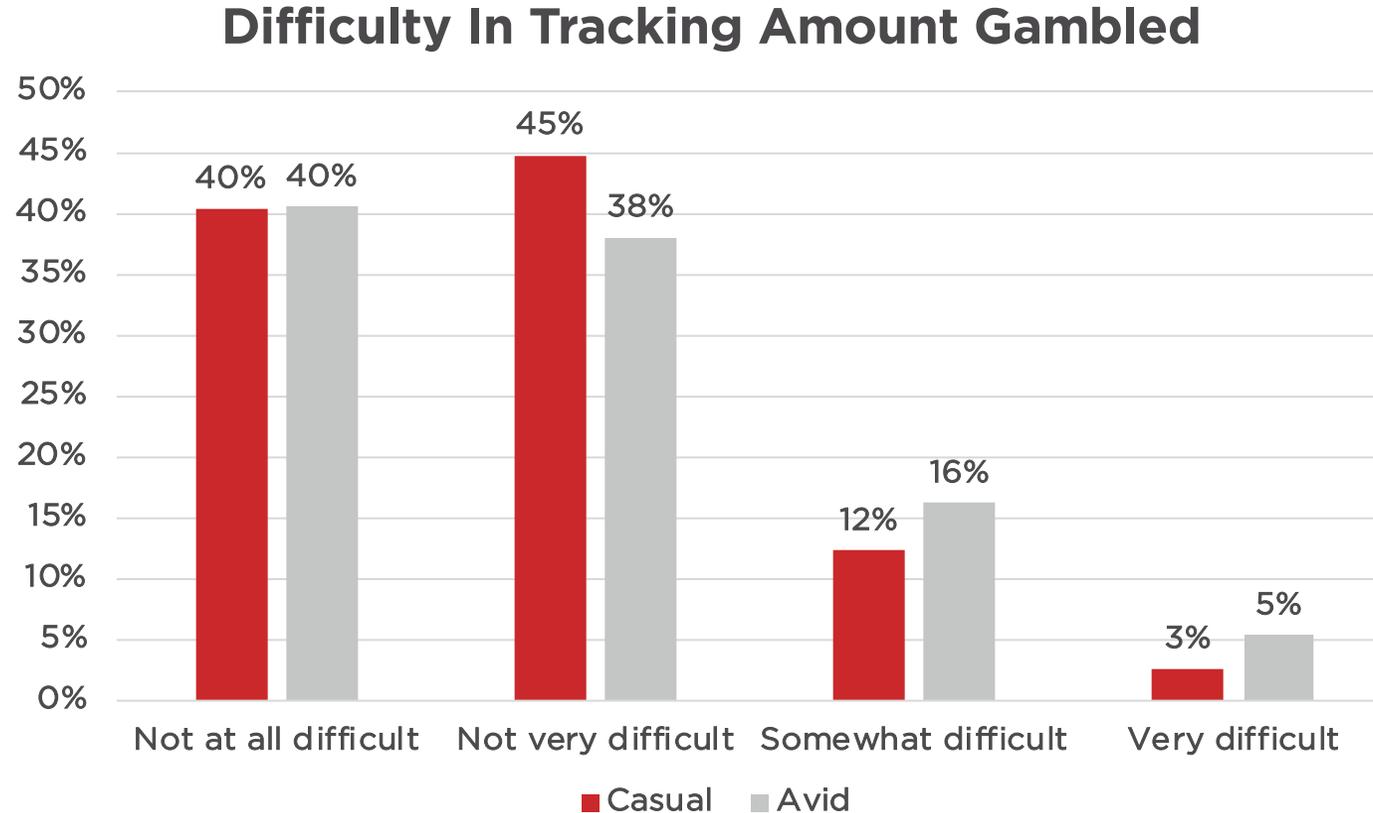
MAJORITY OF CASUAL GAMBLERS RARELY OR NEVER EXCEED THEIR BUDGET



Question: How often do you spend more on gambling than you had budgeted? This question was only asked of respondents who indicated 'always', 'usually' or 'sometimes' setting a gambling budget in advance of a visit.

BASE: (Casual: N = 985; Avid: N = 977; Total: N = 1962)

MORE THAN 8 IN 10 CASUAL GAMBLERS FIND IT EASY TO TRACK AMOUNT GAMBLED

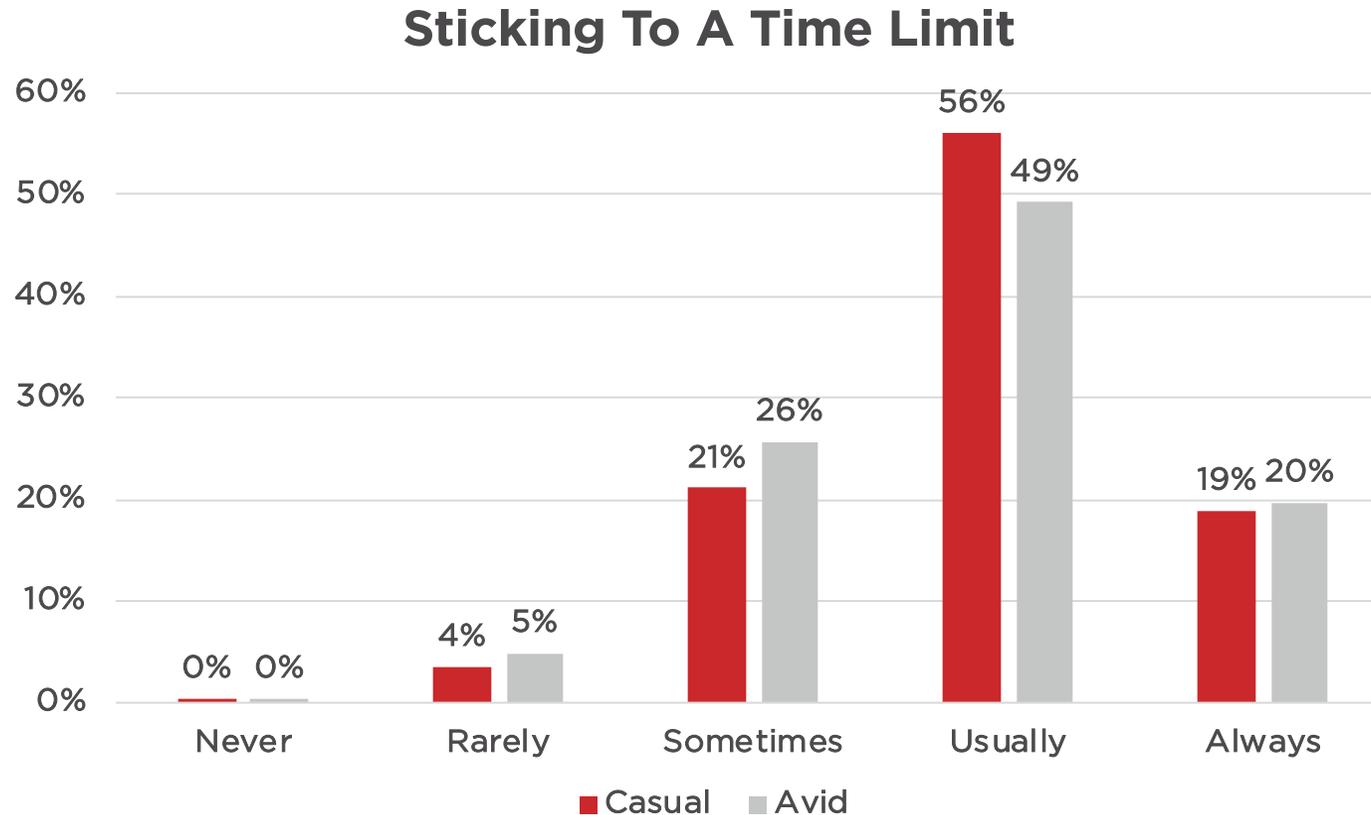


Question: How difficult is it for you to keep track of the amount you are spending on gambling while you are at a casino?

This question was only asked of respondents who indicated 'always', 'usually' or 'sometimes' tracking the amount of money spent on gambling during a visit.

BASE: (Casual: N = 969; Avid: N = 971; Total: N = 1940)

MAJORITY CASUAL, AVID GAMBLERS STICK TO SELF-IMPOSED TIME LIMIT FOR GAMBLING

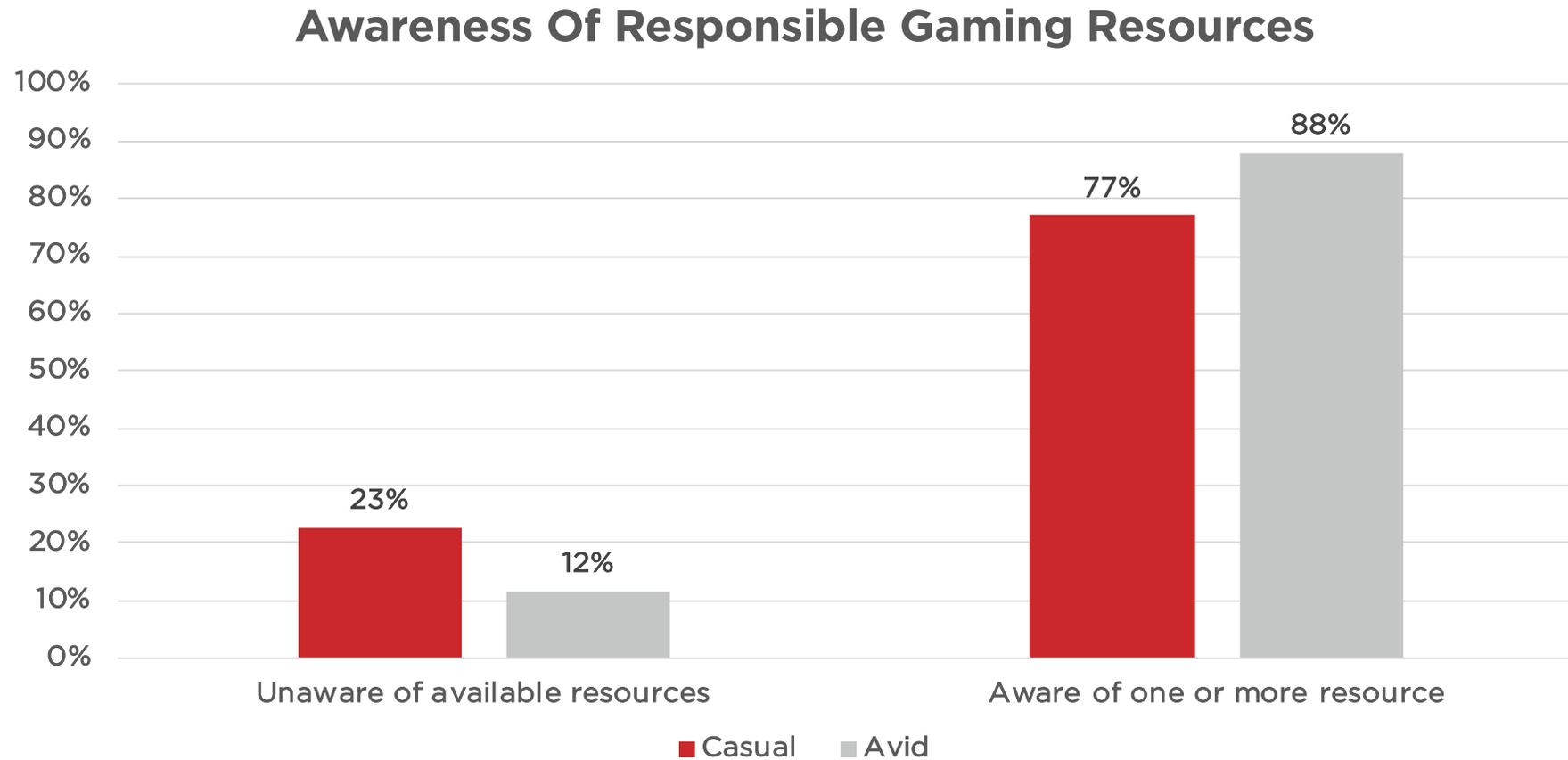


Question: When you set a specific time limit for gambling at a casino, how often do you stick to that time limit (gambling either up to or less than the set time limit)?

This question was only asked of respondents who indicated 'always', 'usually' or 'sometimes' setting a specific time limit for gambling.

BASE: (Casual: N = 740; Avid: N = 735; Total: N = 1475)

VAST MAJORITY OF CASUAL, AVID GAMBLERS ARE AWARE OF RESPONSIBLE GAMING RESOURCES*

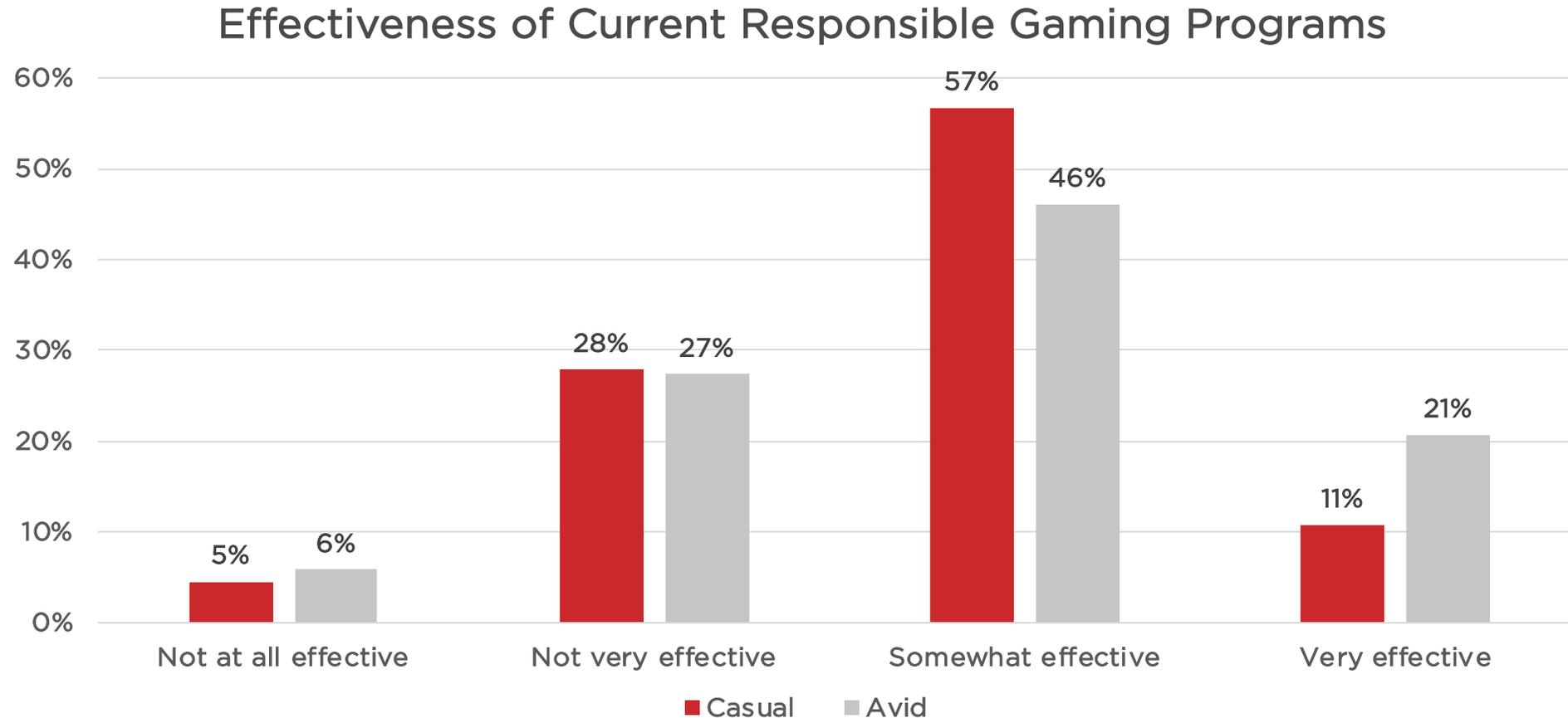


*Casino industry code of conduct; that a player can set a time or a money limit on a machine; that a player can ask to not be allowed to return to a casino property; brochures that provide the odds for casino games; and toll free help lines.

Question: Which of the following Responsible Gaming resources have you heard of, or were you familiar with, prior to taking this survey? *Select all that apply.*

BASE: (Casual: N = 1003; Avid: N = 1011; Total: N = 2014)

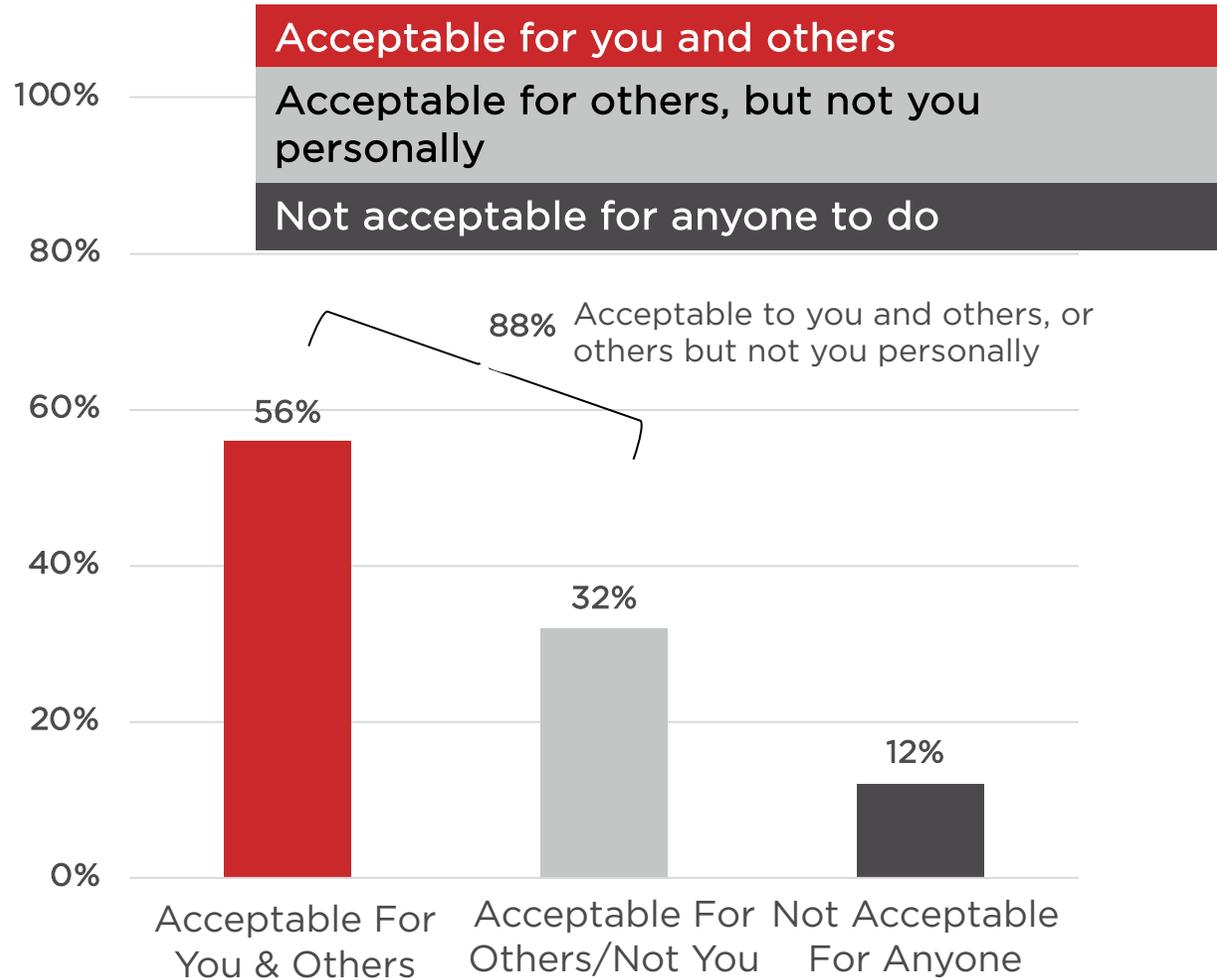
GAMBLERS FEEL CURRENT RESPONSIBLE GAMING PROGRAMS ARE EFFECTIVE



Question: Based on what you know or believe to be true, how effective do you feel the casinos' Responsible Gaming programs are today?

BASE: (Casual: N = 1003; Avid: N = 1011; Total: N = 2014)

NEARLY 9 IN 10 AMERICANS FIND GAMBLING ACCEPTABLE



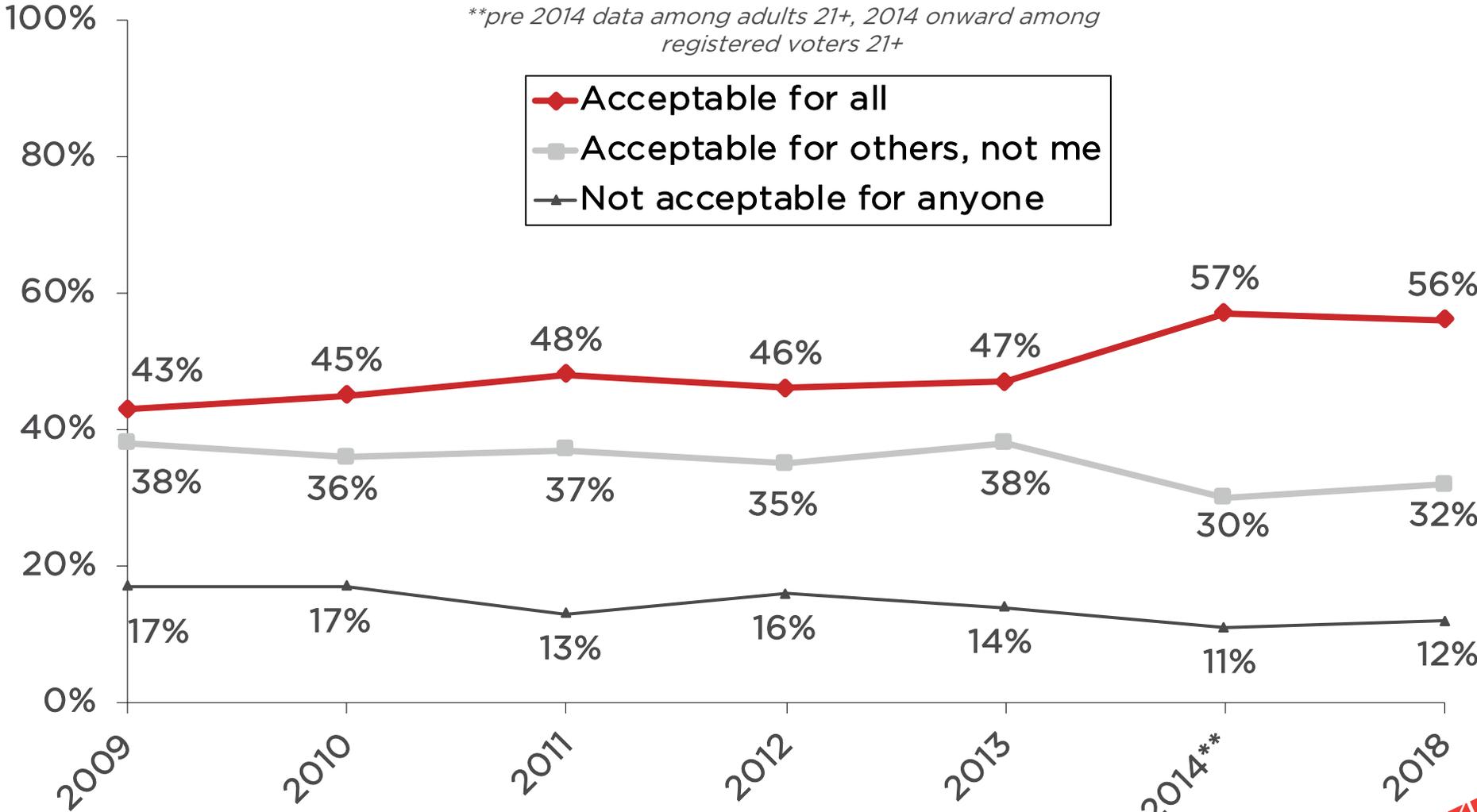
Question: What are your own personal views of gambling? Would you say casino gambling is...?

	You & Others	Others Only	Not For Anyone
Casino Attendee	79%	18%	2%
Non-Attendee	43%	39%	17%
Democratic	58%	33%	9%
Independent	59%	31%	8%
Republican	50%	30%	19%
Male	58%	31%	10%
Female	53%	32%	14%
21-29	59%	28%	12%
30-39	60%	33%	8%
40-49	62%	25%	12%
50-59	59%	32%	9%
60+	48%	36%	15%
HS or Less	52%	31%	14%
Some College	58%	31%	10%
College Grad+	56%	32%	12%
White	57%	31%	12%
Non-White	53%	33%	12%

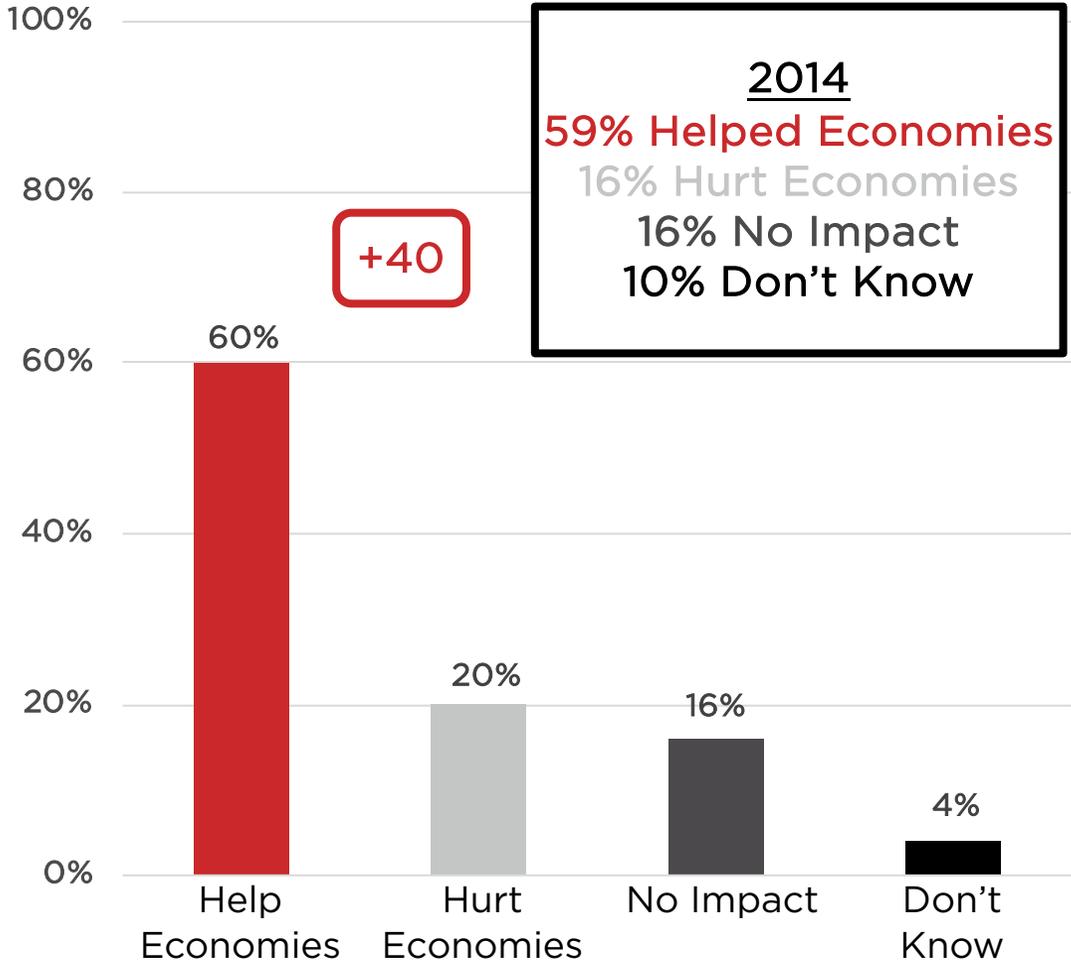
THE PUBLIC CONTINUES TO BE MORE ACCEPTING OF GAMBLING THAN BEFORE 2014

Personal Views Of Gambling Over Time

***pre 2014 data among adults 21+, 2014 onward among registered voters 21+*



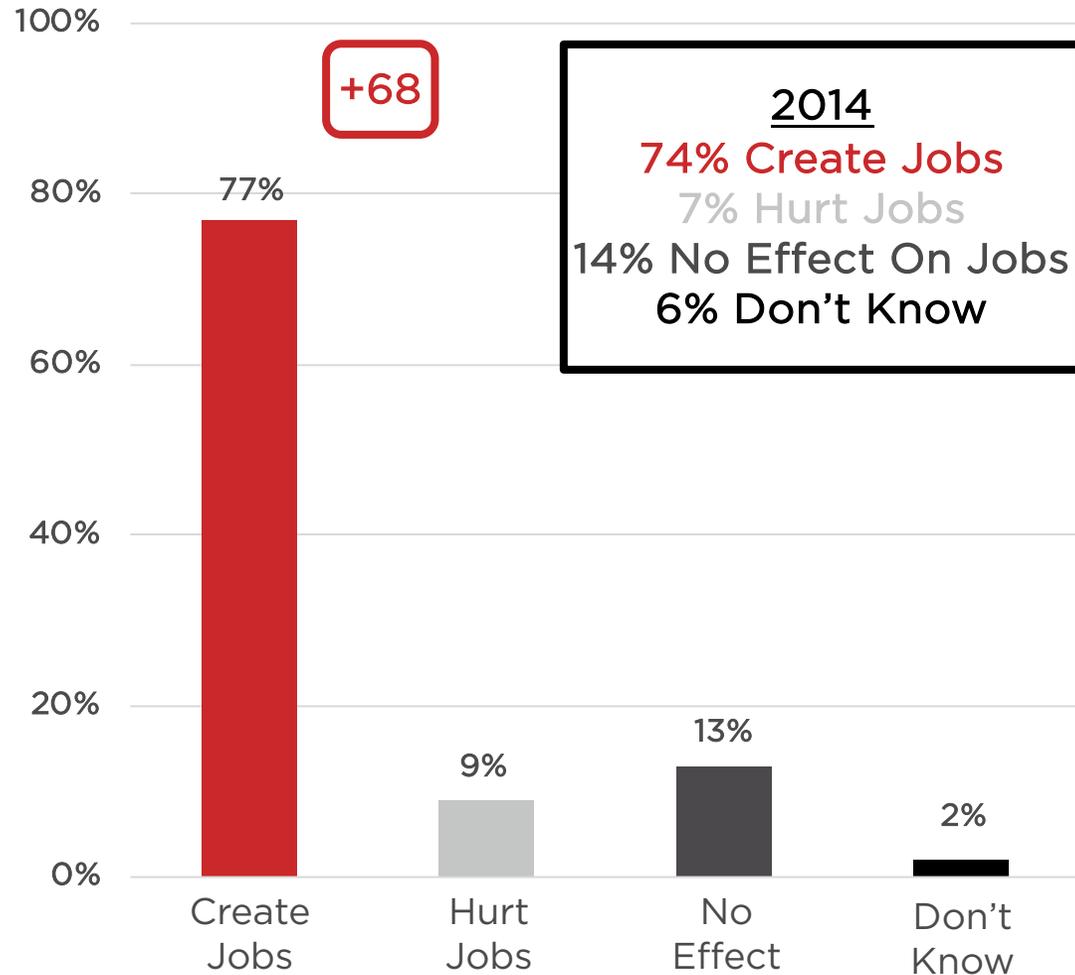
MAJORITIES ACROSS NEARLY EVERY DEMOGRAPHIC GROUP BELIEVE CASINOS HELP LOCAL ECONOMIES



	Help Economies	Hurt Economies	No Impact
Casino Attendee	73%	11%	14%
Non-Attendee	53%	25%	17%
Democratic	65%	15%	17%
Independent	57%	19%	19%
Republican	56%	28%	13%
Male	64%	19%	15%
Female	57%	21%	17%
21-29	56%	19%	20%
30-39	61%	12%	24%
40-49	68%	17%	14%
50-59	64%	20%	14%
60+	55%	26%	13%
HS or Less	54%	21%	21%
Some College	63%	20%	15%
College Grad+	63%	21%	13%
White	63%	21%	13%
Non-White	54%	19%	22%

Question: Generally speaking, do you think casinos help the economies where they are located, do they hurt the economies where they are located, or do casinos have no impact on the economy?

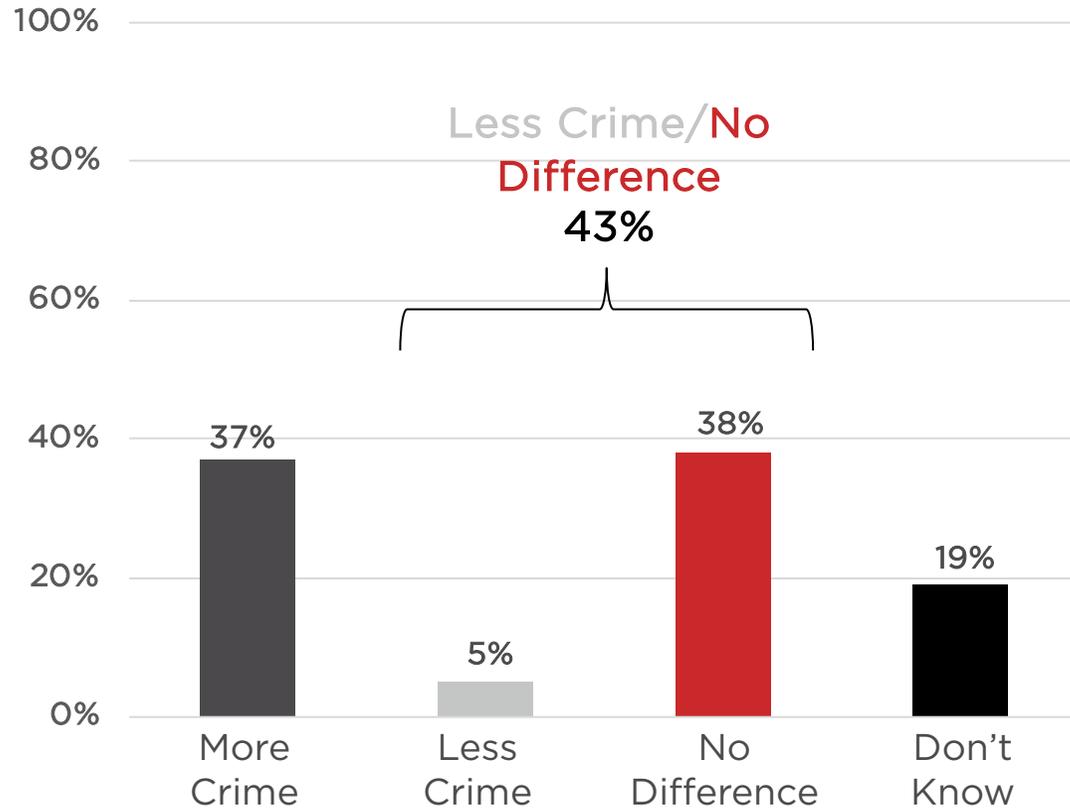
A LARGE MAJORITY THINKS CASINOS CREATE JOBS



	Create Jobs	Hurt Jobs	No Effect
Casino Attendee	88%	4%	7%
Non-Attendee	71%	12%	16%
Democratic	78%	8%	13%
Independent	80%	6%	12%
Republican	72%	13%	13%
Male	76%	9%	13%
Female	77%	9%	12%
21-29	70%	12%	17%
30-39	78%	6%	14%
40-49	82%	8%	8%
50-59	80%	10%	9%
60+	75%	9%	14%
HS or Less	72%	9%	16%
Some College	79%	11%	9%
College Grad+	78%	8%	13%
White	78%	8%	12%
Non-White	73%	11%	14%

Question: In general, do you think the casino gambling industry does more to create jobs or hurt jobs, or does it have no effect on jobs?

A PLURALITY DO NOT THINK CASINOS LEAD TO MORE CRIME



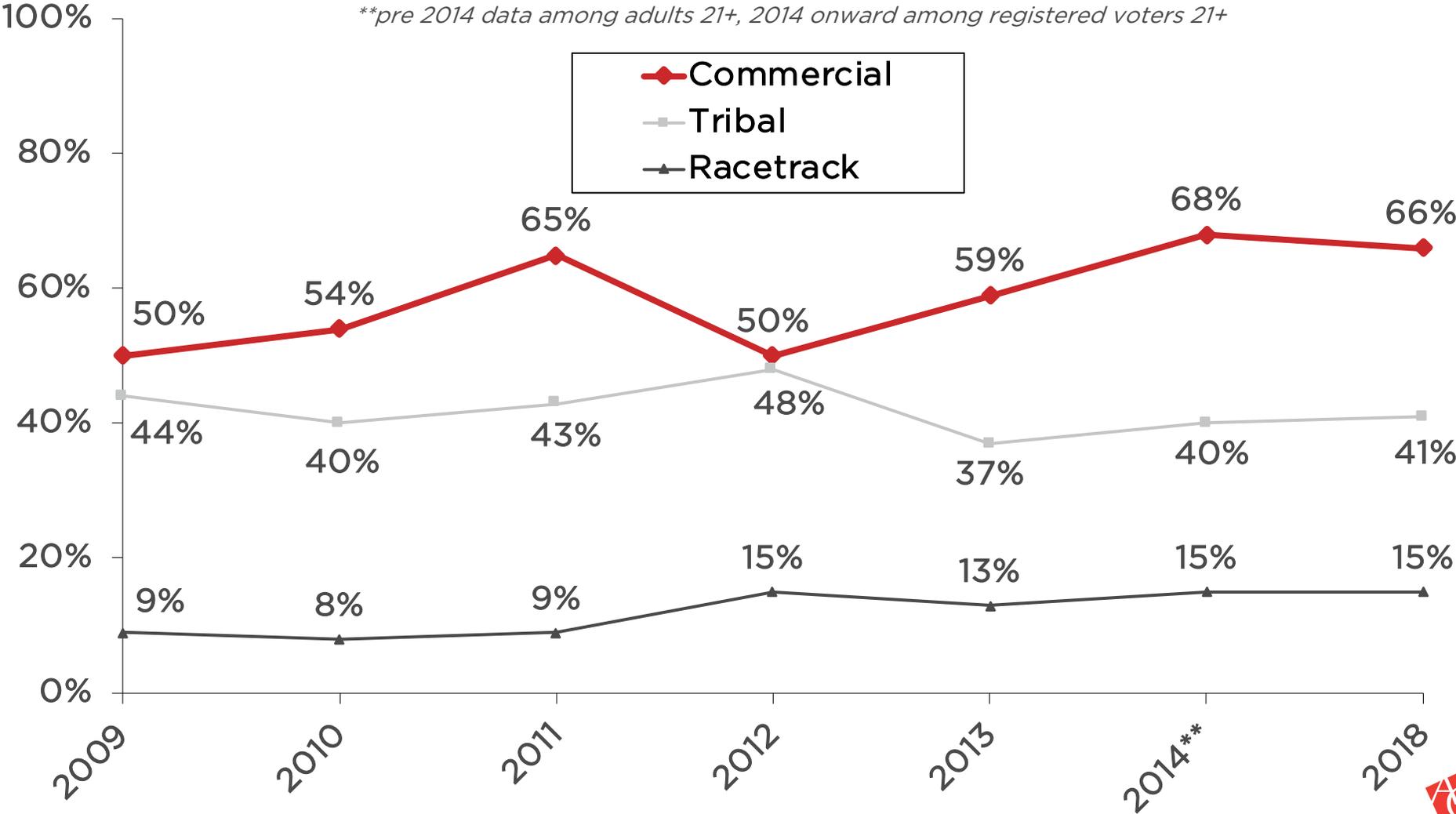
	More Crime	Less Crime	No Difference
Casino Attendee	27%	9%	48%
Non-Attendee	42%	3%	33%
Democratic	33%	6%	39%
Independent	32%	6%	41%
Republican	47%	4%	36%
Male	38%	5%	41%
Female	36%	6%	36%
21-29	29%	4%	39%
30-39	33%	6%	40%
40-49	36%	4%	43%
50-59	44%	5%	36%
60+	39%	6%	37%
HS or Less	33%	7%	41%
Some College	38%	5%	39%
College Grad+	41%	5%	36%
White	38%	5%	38%
Non-White	35%	8%	40%

Question: Generally speaking, do you think casinos lead to more crime in the communities in which they are located, do they lead to less crime, or do casinos not really have any impact on crime rates?

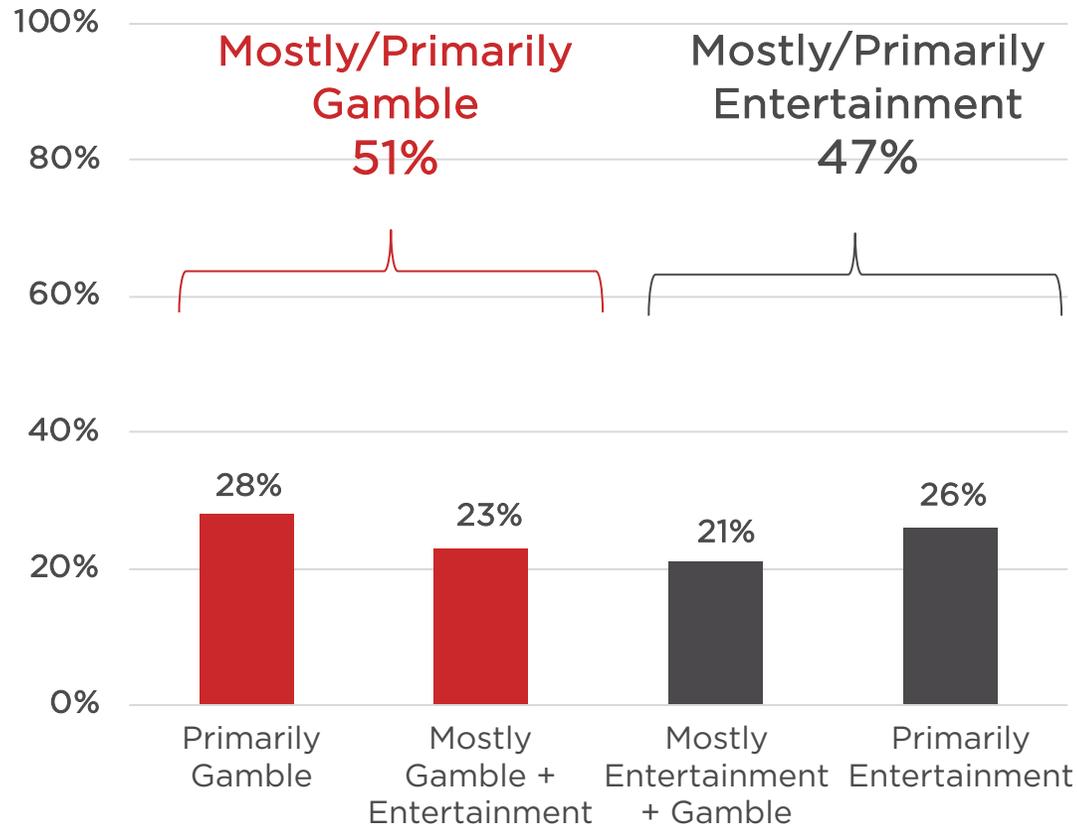
THE NUMBER VISITING COMMERCIAL CASINOS REMAINS NEAR ALL-TIME HIGH

Casino Locations Visited In Past Year Over Time

***pre 2014 data among adults 21+, 2014 onward among registered voters 21+*



CASINO VISITORS SPLIT EVENLY BETWEEN THOSE WHO GO MOSTLY TO GAMBLE & THOSE WHO GO MOSTLY FOR ENTERTAINMENT

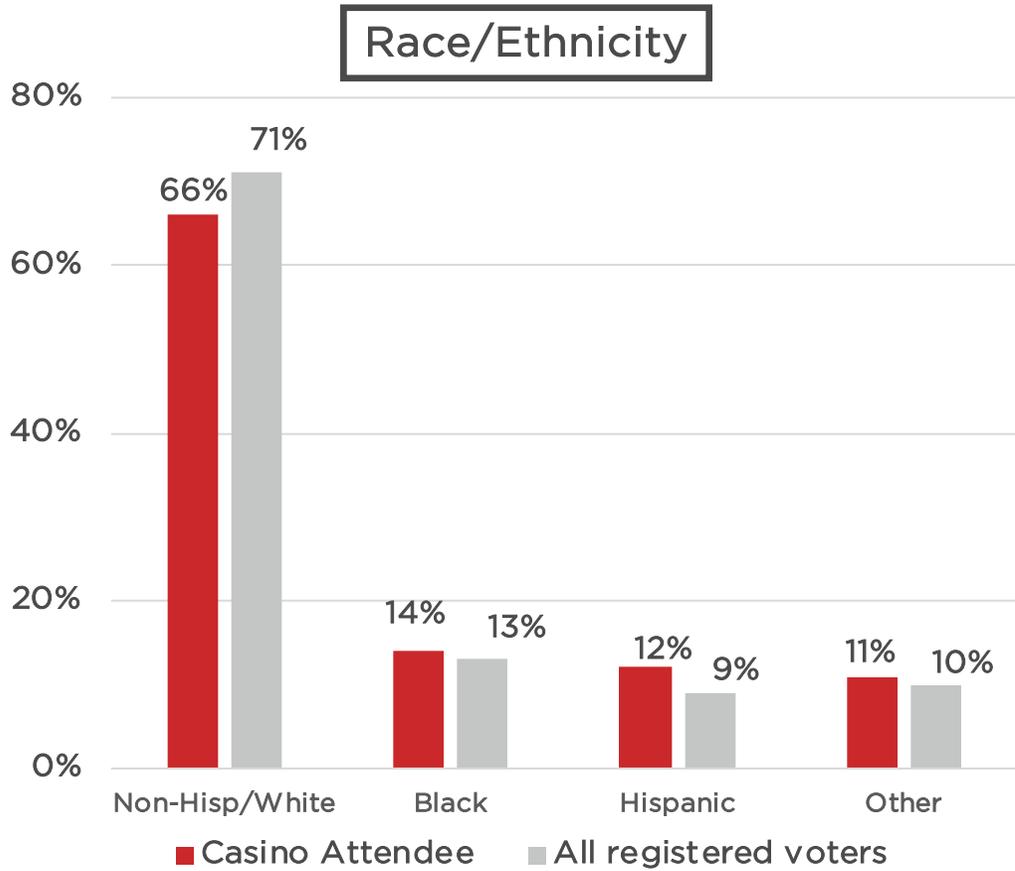
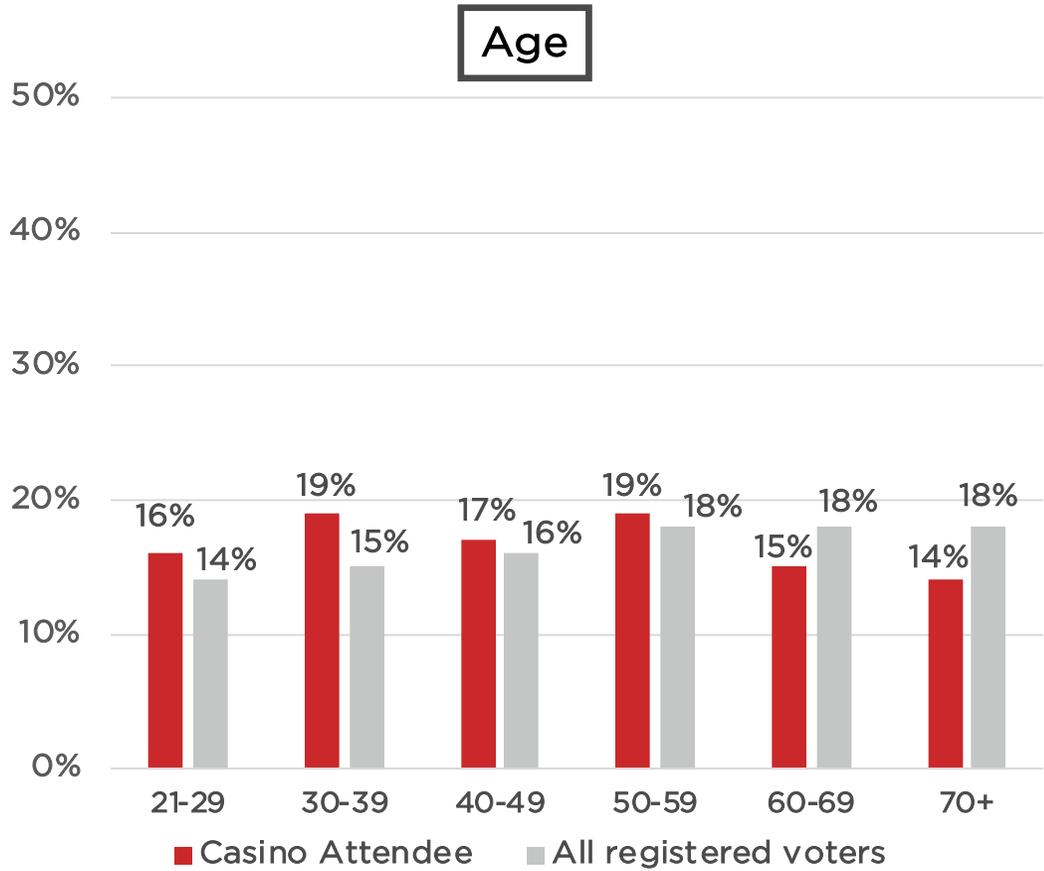


	Mostly/Primarily Gamble	Mostly/Primarily Entertainment
<20 Miles	48%	49%
20-50 Miles	60%	40%
50-100 Miles	51%	44%
100+ Miles	47%	53%
Democratic	51%	48%
Independent	51%	44%
Republican	49%	49%
Male	53%	45%
Female	48%	49%
21-29	45%	53%
30-39	53%	46%
40-49	43%	53%
50-59	46%	54%
60+	59%	37%
HS or Less	56%	41%
Some College	55%	44%
College Grad+	44%	54%
White	51%	46%
Non-White	51%	48%

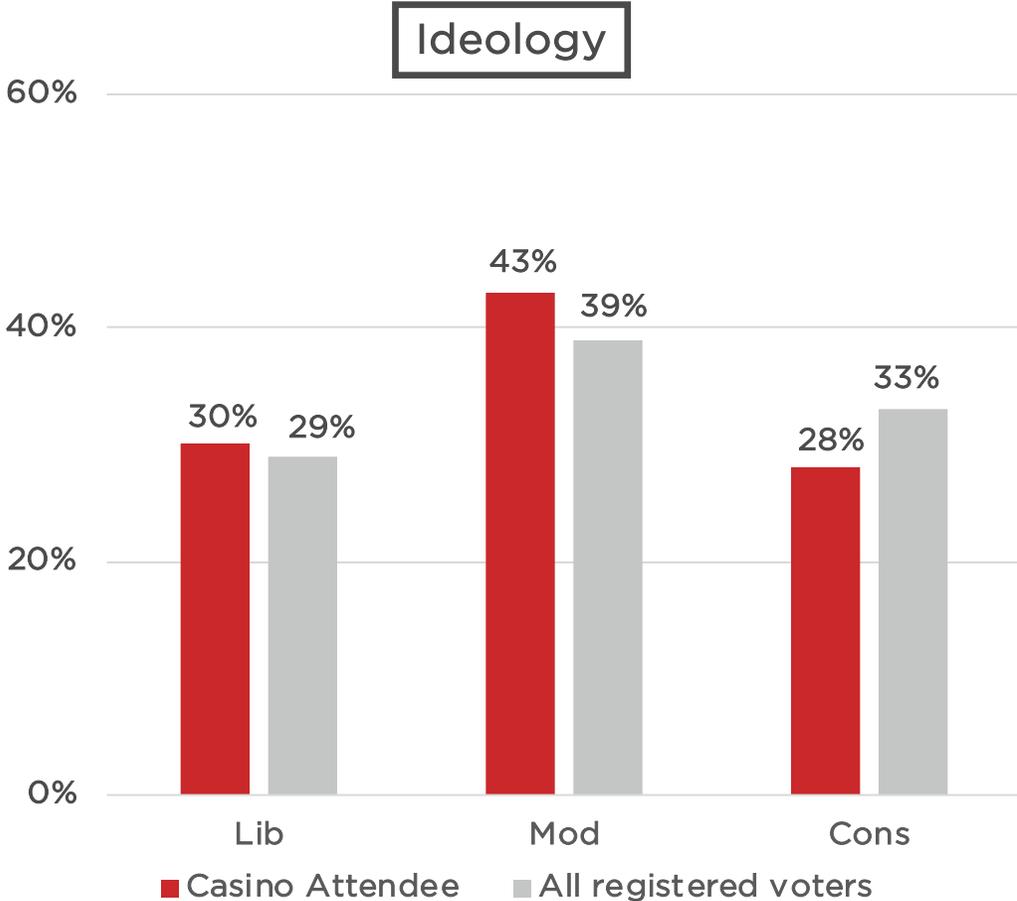
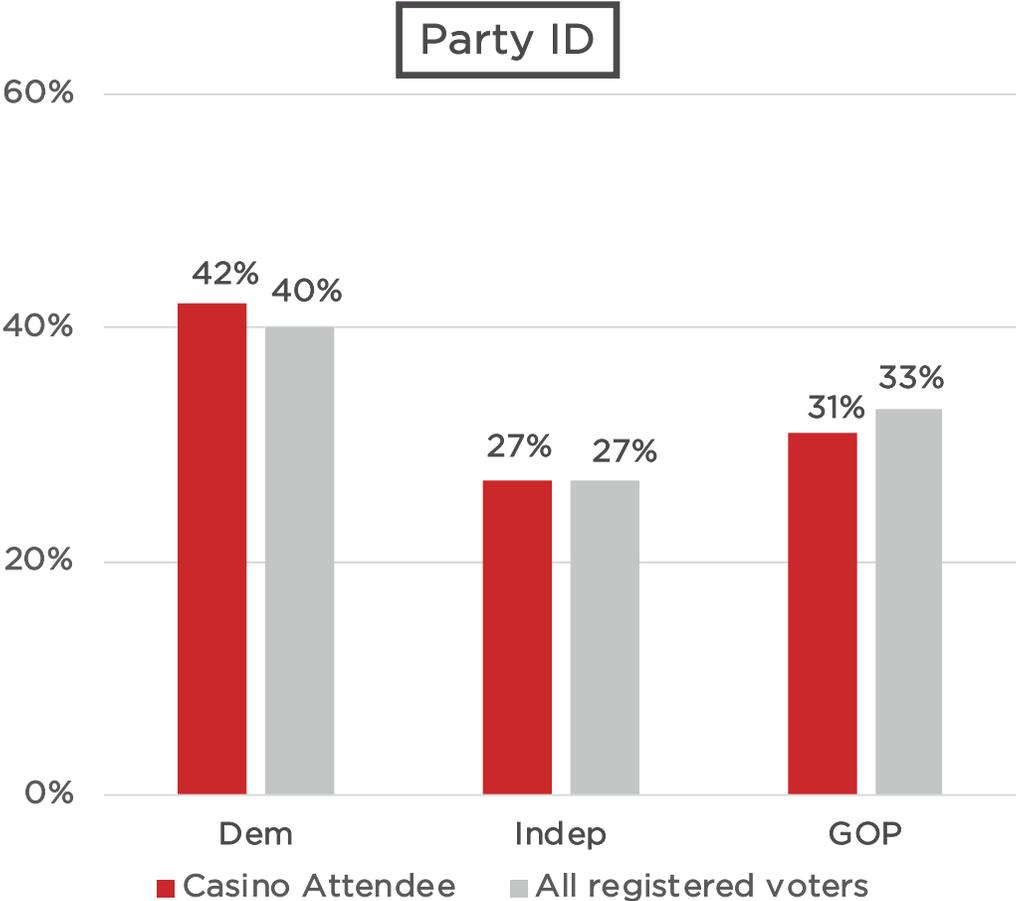
Question: Do you go to a casino primarily to gamble, mostly to gamble but also make use of other entertainment options, mostly to make use of other entertainment options, but also to gamble, or primarily to make use of non-gambling entertainment options at the casino?

BASE: (Those who have been to a casino)

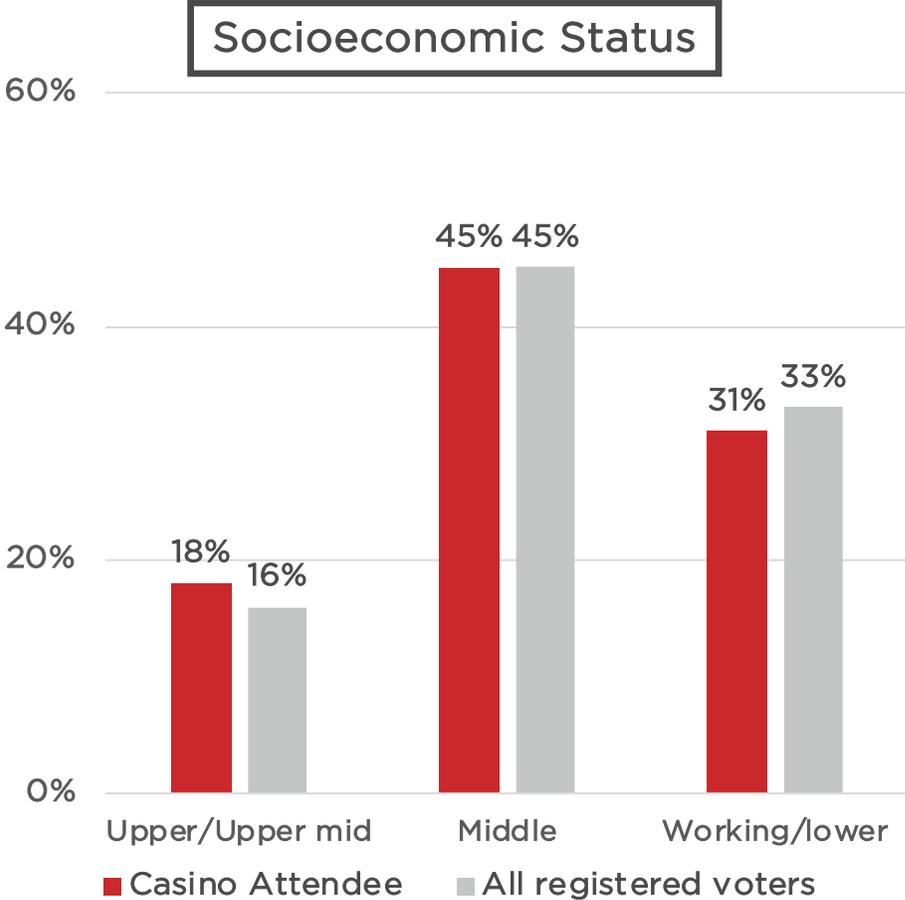
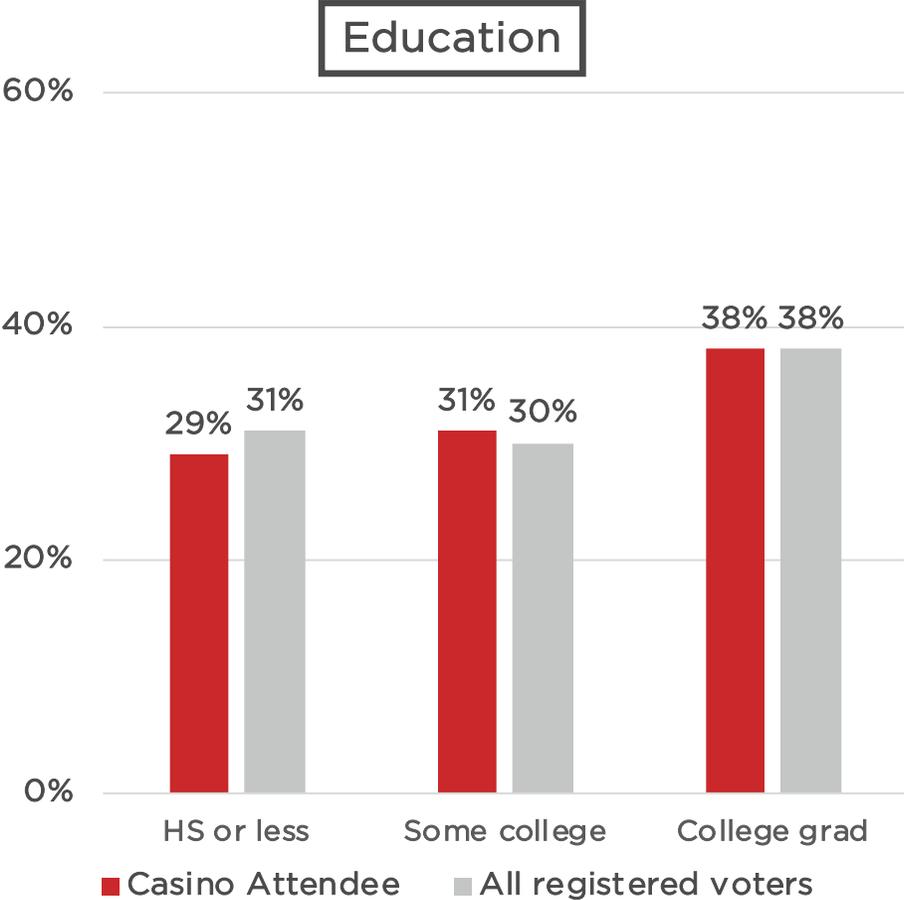
COMPARED TO REGISTERED VOTERS, CASINO VISITORS ARE A BIT YOUNGER AND SLIGHTLY MORE LIKELY TO BE NON-WHITE



CASINO VISITORS ARE A BIT MORE DEMOCRATIC AND MODERATE, BUT THE DIFFERENCES ARE MINOR



THERE IS LITTLE DIFFERENCE IN EDUCATION OR SOCIO-ECONOMIC STATUS OF CASINO VISITORS



METHODOLOGY

- Data on casino visitors' responsible gaming practices comes from a survey of 2,014 past year casino goers, which was conducted online by BrandOutlook.
 - Casual Gamblers are defined as having gambled at a US casino between 1 and 9 times in the past 12 months.
 - Avid Gamblers are defined as having gambled at a US casino 10 times or more in the past 12 months
- Data on Americans' acceptance of gaming comes from our survey of American's attitudes toward gaming and was conducted by the Mellman Group of 1,000 registered voters, both online and on the phone.