



May 7, 2015

10:15 a.m. – 11:15 a.m.

Hall D, Rooms 5-6

Hot Topic: Gaming Tourism Roundtable

Regional gaming markets throughout the country are struggling with the challenge of aging demographics and declining visitor counts.

The need to increase length-of-stay and broaden the demographic appeal of the casino gaming product has intensified in importance.

Hear from gaming and tourism leaders in the southern region what steps are being taken to address these challenges, as well as their assessment of the changes that will continue to impact regional gaming markets as they move forward.



Hot Topic: Gaming Tourism Roundtable

Moderator:

- Michael Bruffey, *Deputy Director, Mississippi Gaming & Hospitality Association*

Panelists:

- Renee Areng, *Executive Director, Visit Mississippi Gulf Coast*
- Webster Franklin, *President & CEO, Tunica Convention & Visitors Bureau*
- John Hairston, *Former Chairman, Mississippi Gaming Commission*
- Misty Shaw, *Director of Programs & Services, Louisiana Office of Tourism*
- Rick Taylor, *President of Mississippi Tourism Association and Executive Director, Hattiesburg Tourism*



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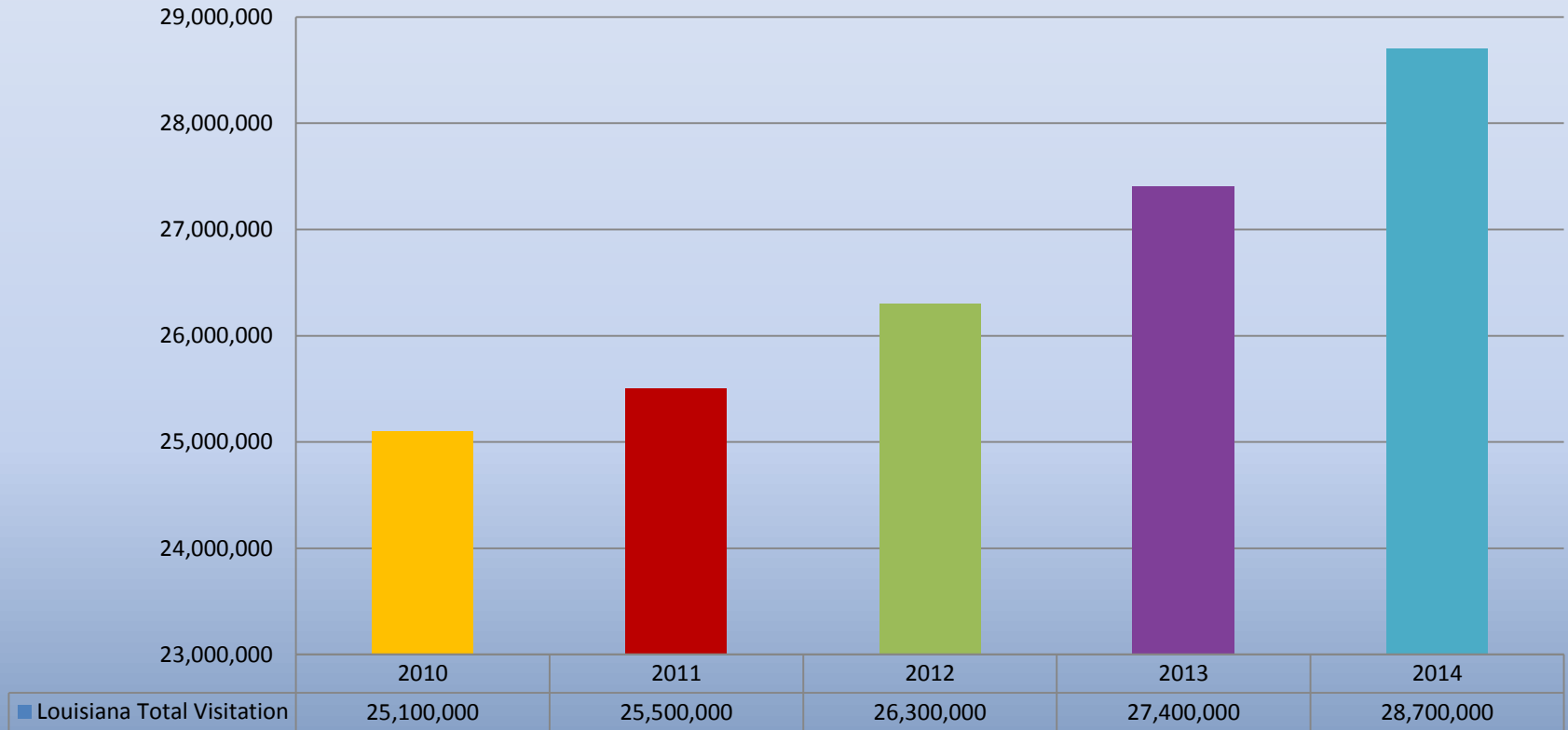
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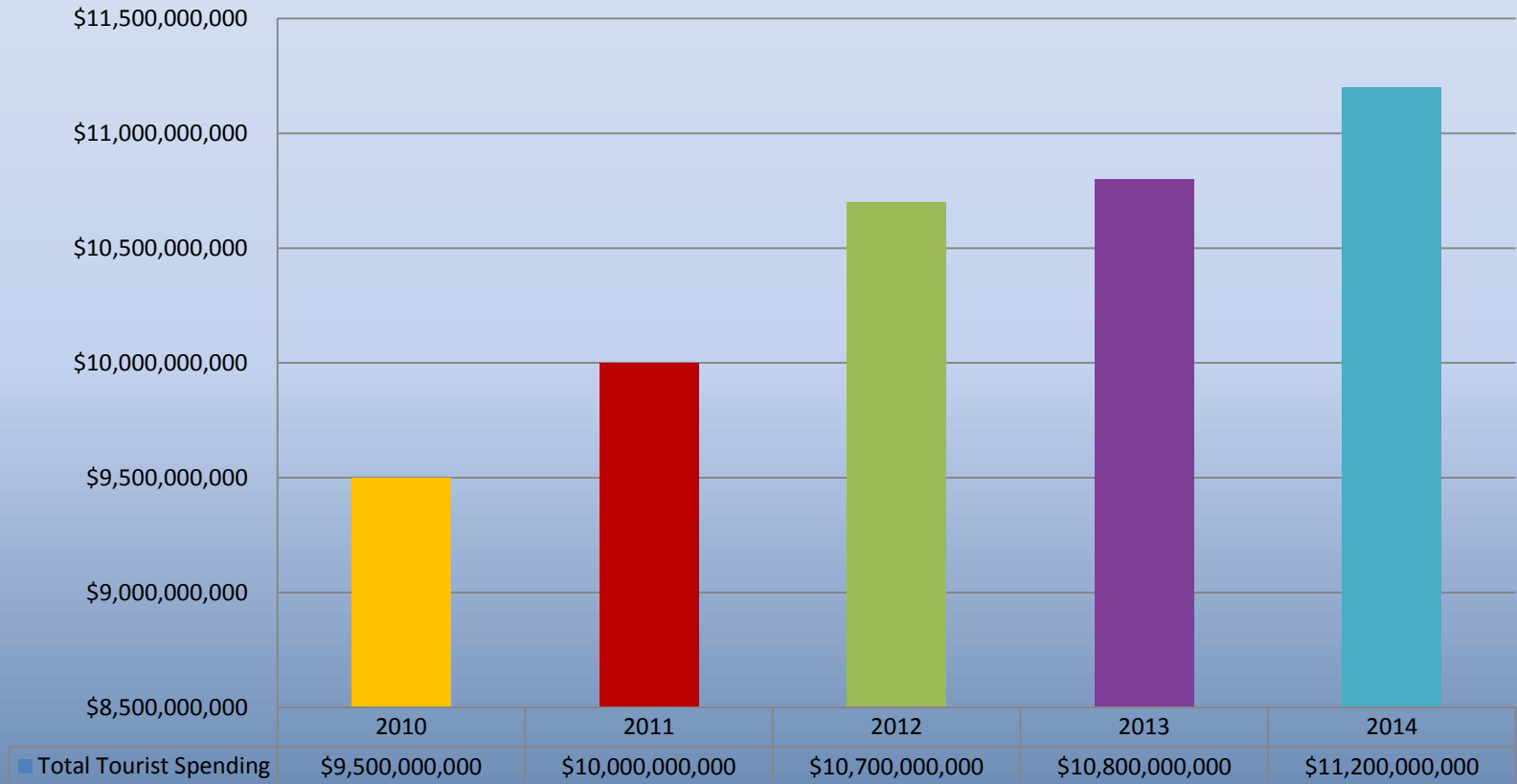
Hot Topic: Gaming Tourism Roundtable

**A review of the Louisiana Visitation and
Spend numbers...**

Louisiana Total Visitation



Louisiana Total Visitor Spending





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2013 – 27.4 million visitors to Louisiana

2013 Spend - \$10.80 billion

2014 – 28.7 million visitors to Louisiana

2014 Spend - \$11.20 billion



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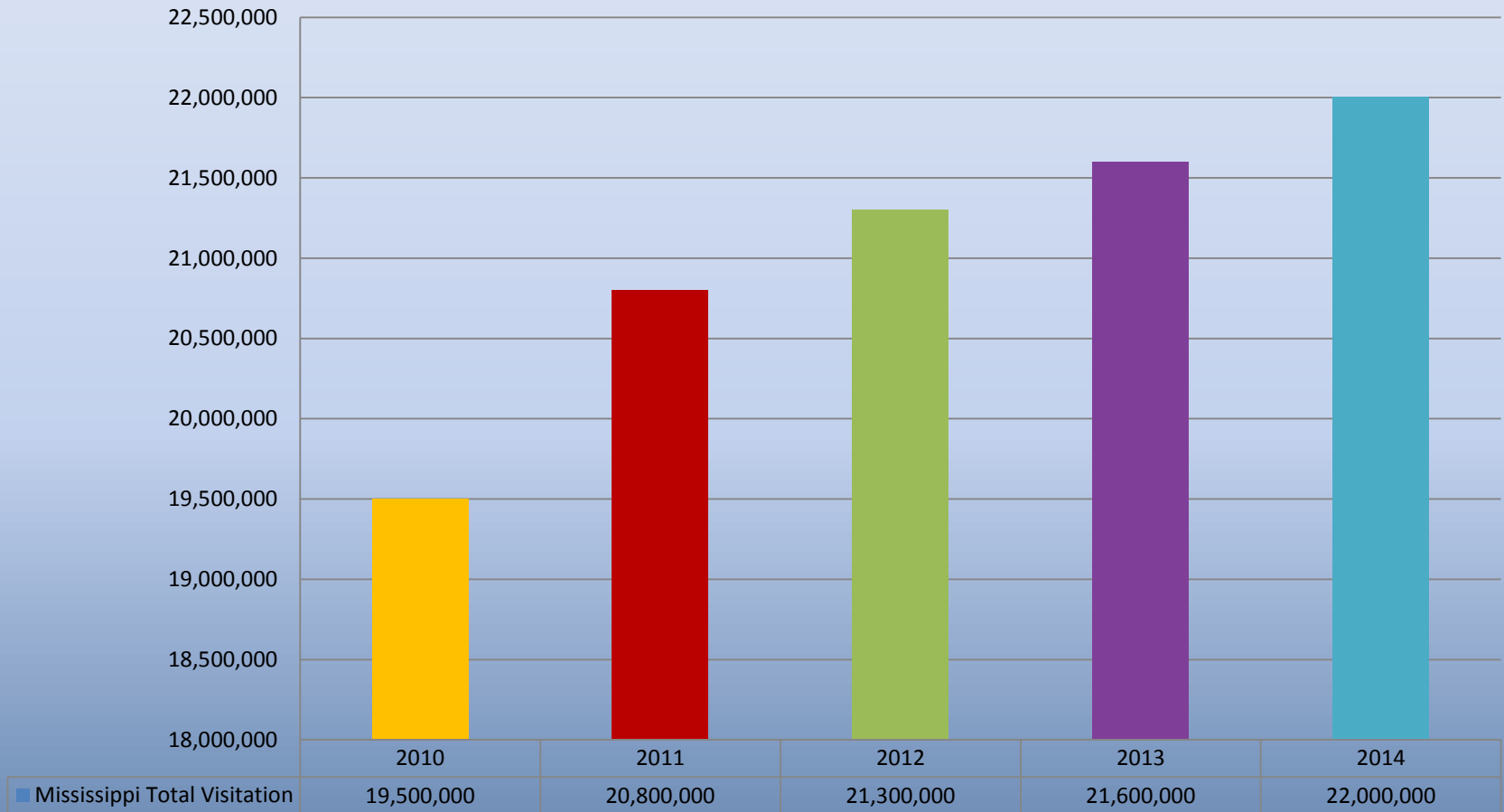
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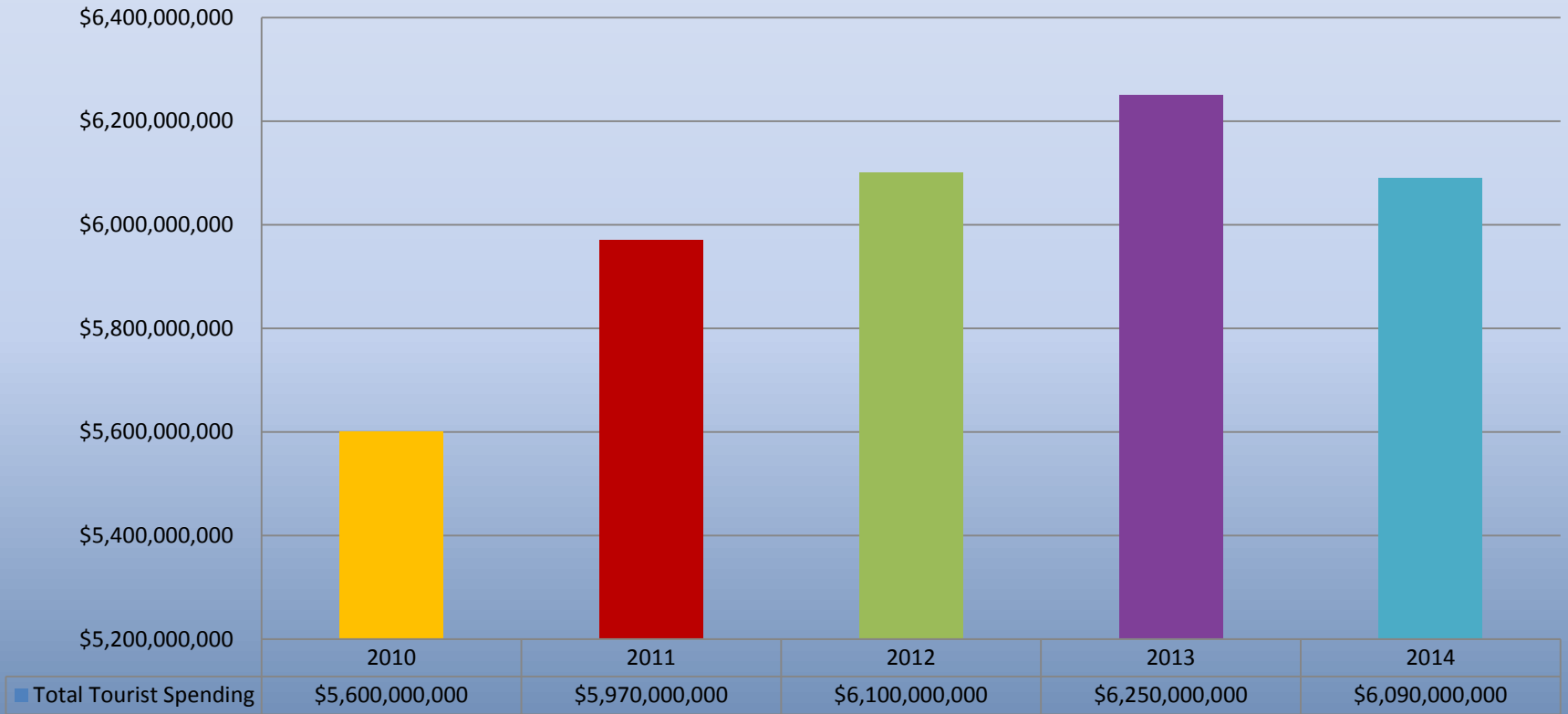
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**A review of the Mississippi Visitation and
Spend numbers...**

Mississippi Total Visitation



Mississippi Total Visitor Spending





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2013 - 21.6 million visitors to Mississippi

2013 Spend - \$6.20 billion

2014 - 22 million visitors to Mississippi

2014 Spend - \$6.09 billion



Mississippi and Louisiana

50 million visitors
\$17.3 billion in spend

The Southern Gaming Region



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Discussion of Different Visitation Drivers:

- **Casinos**
- **Non-Gaming Amenities**
 - **Special Events**
 - **Marketing**
 - **Access**

Casinos

AGA Annual 2013 Report

53% of visitors to casino engage in tourism activities outside casino
65% in a younger demographic

MS Statistics

In 2014, 15 million out of state visits to a MS casino
In 2014, over \$106 million spent on advertising and promotions

LA Statistics

In 2014, 30 million visits to LA casinos/racinos



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Non-Gaming Amenities

2011 PWC Study

Rule 1.5 of MGC

Effective Jan 1, 2014: A project will now include an amenity unique to market and will encourage economic development and promote tourism.

2014 MS Casino Total Revenues: \$2.86 billion

Gaming: \$2.08 billion

Non-Gaming \$780 million = 27%

Special Events

Louisiana Marathon

Began in 2012

3 days long.

6,476 Race participants (66% non-local)*

\$3.6 Million Est Spend *

* *Study done by Kent State on 2014 race.*

Cruisin' the Coast

Began in 1996, 2014 was 18th Cruisin'

8 days long

7,293 Registered participants in 2014 (93% non-local)

More than 100,000 spectators over the 8 days

\$25 Million Estimated Spend in Mississippi

**Study done by Bradley Research Group*

Special Events

Mardi Gras

Began in 1718.

Season length varies.

New Orleans study, by Tulane University & Freeman Consulting Group. showed that:

In 2014 it contributed \$465 million in spending which equals \$17.5 million in tax revenues.

NOLA's MG impact had a 54% growth from 2011.

** Office of Tourism has not performed an economic impact for state-wide Mardi Gras due to scope and subsequent cost.*



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Marketing

Direct Spend Ratios

MS - \$6.46 to \$1 on advertising

LA - \$17 to \$1 on advertising

Raleigh Durham - \$25 to \$1 advertising



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Access

Drive In Markets – Roads

Convenience Gaming

Air Service



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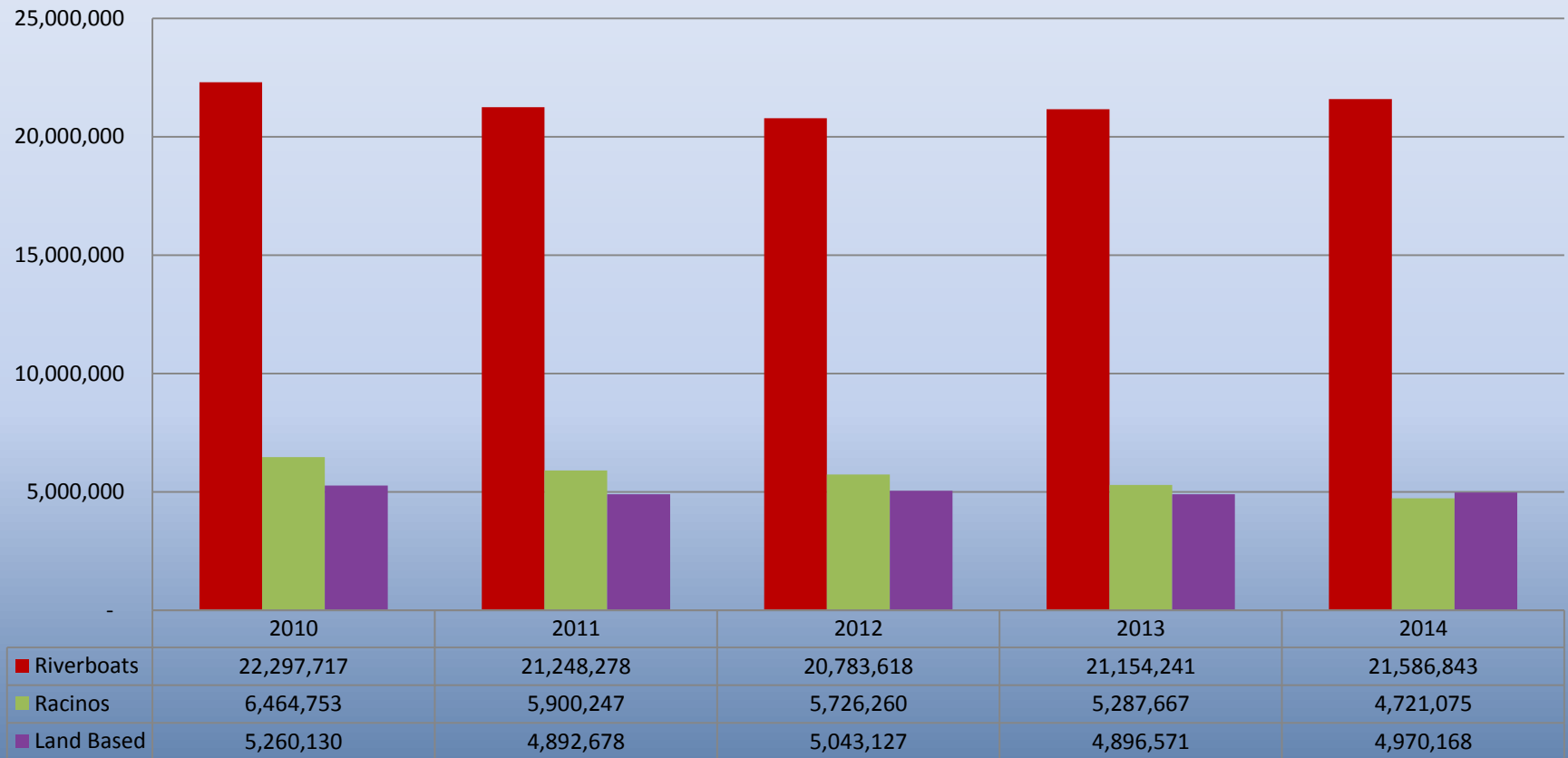
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**A look at Louisiana visitation numbers and
capital / investment by casinos...**

Louisiana Total Gaming Admissions



Riverboats Notes: L'Auberge Baton Rouge opened in Sept 2012; Margaritaville opened June 2013; Golden Nugget (LC) opened Dec 2014.



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Since 2012, Capital Invested by LA Casinos

Margaritaville – Bossier City - \$220 million

L'Auberge – Baton Rouge - \$380 million

Golden Nugget – Lake Charles - \$700 million

Total: \$1.3 billion



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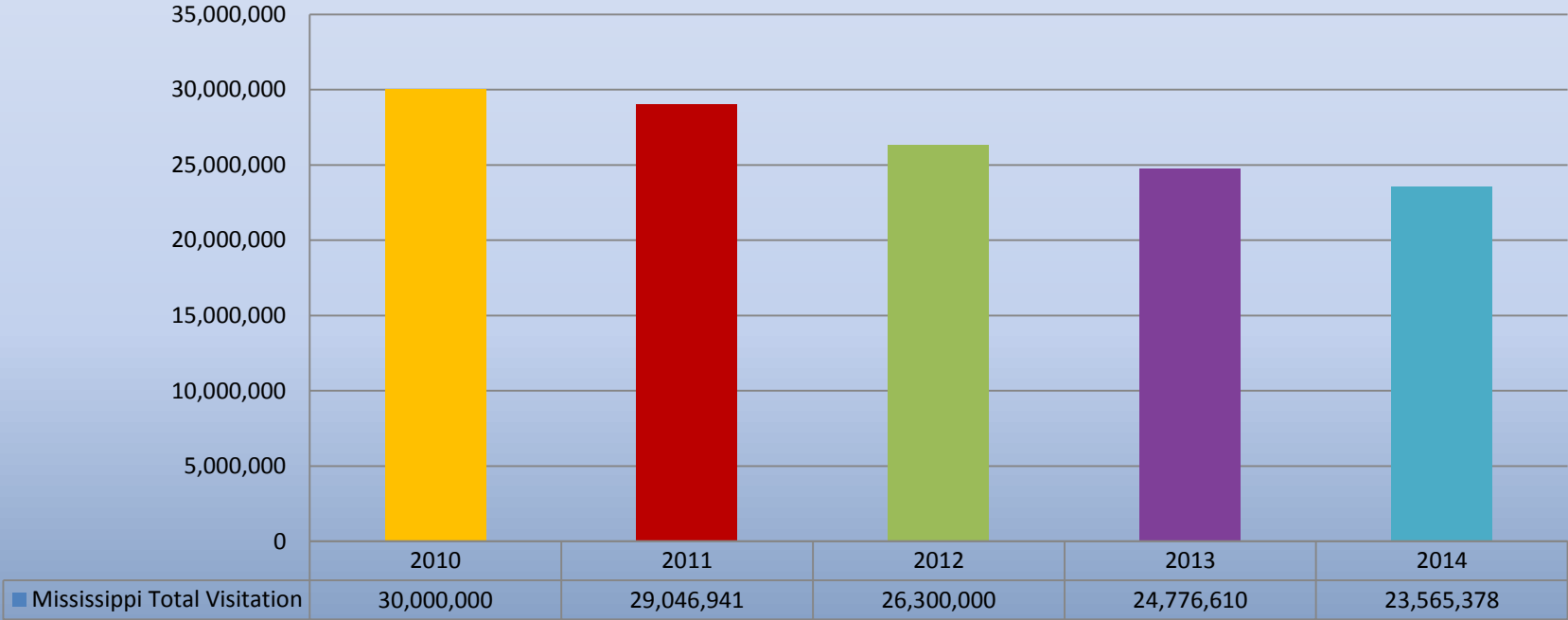
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**A look at Mississippi visitation and capital /
investment numbers...**

Mississippi Total Casino Visitation



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Since May 2011, when the Mississippi River Casinos closed for an average of 25 days, casino visitation numbers have shown a downward trend.

Arkansas 2011 (1.8 million) → 2014 (1.1 million)

Tennessee 2011 (3.3 million) → 2014 (1.8 million)

42% decline



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Capital Investment Since 2011

Palace Casino: \$50 million

IP Casino: \$288 million + \$60 million

Golden Nugget: \$50 million + \$100 million

Hard Rock: \$250 million + \$32.50 million

Harrah's Gulf Coast: \$30 million

→ continued ...



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Capital Investment continued ...

Silver Slipper: \$17.5 million

Island View: \$60 million

MGM Park: \$32.5 million

Scarlett Pearl: \$250 million

Total: over \$1.5 billion



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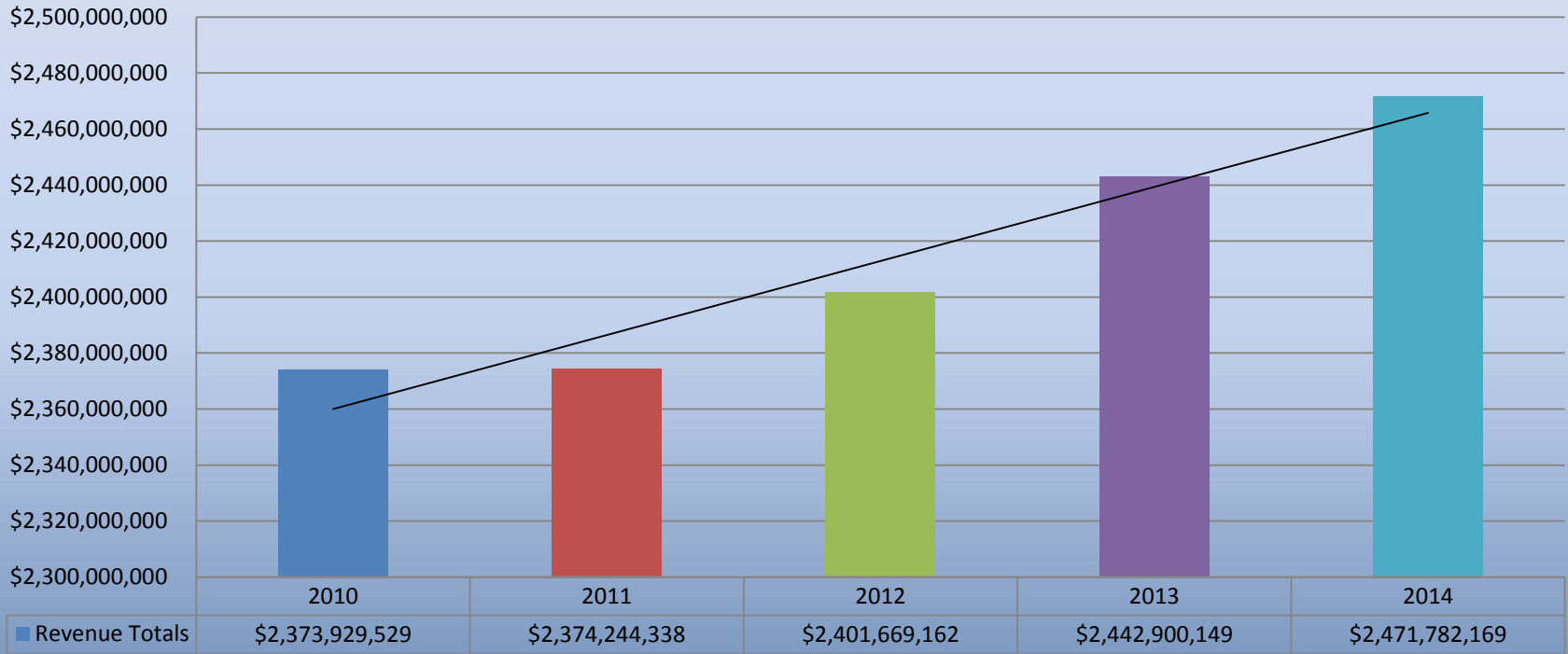
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Impact of Capital Investment

Louisiana Gaming Revenue Totals





MGC General Conclusions and Specifics for 2014

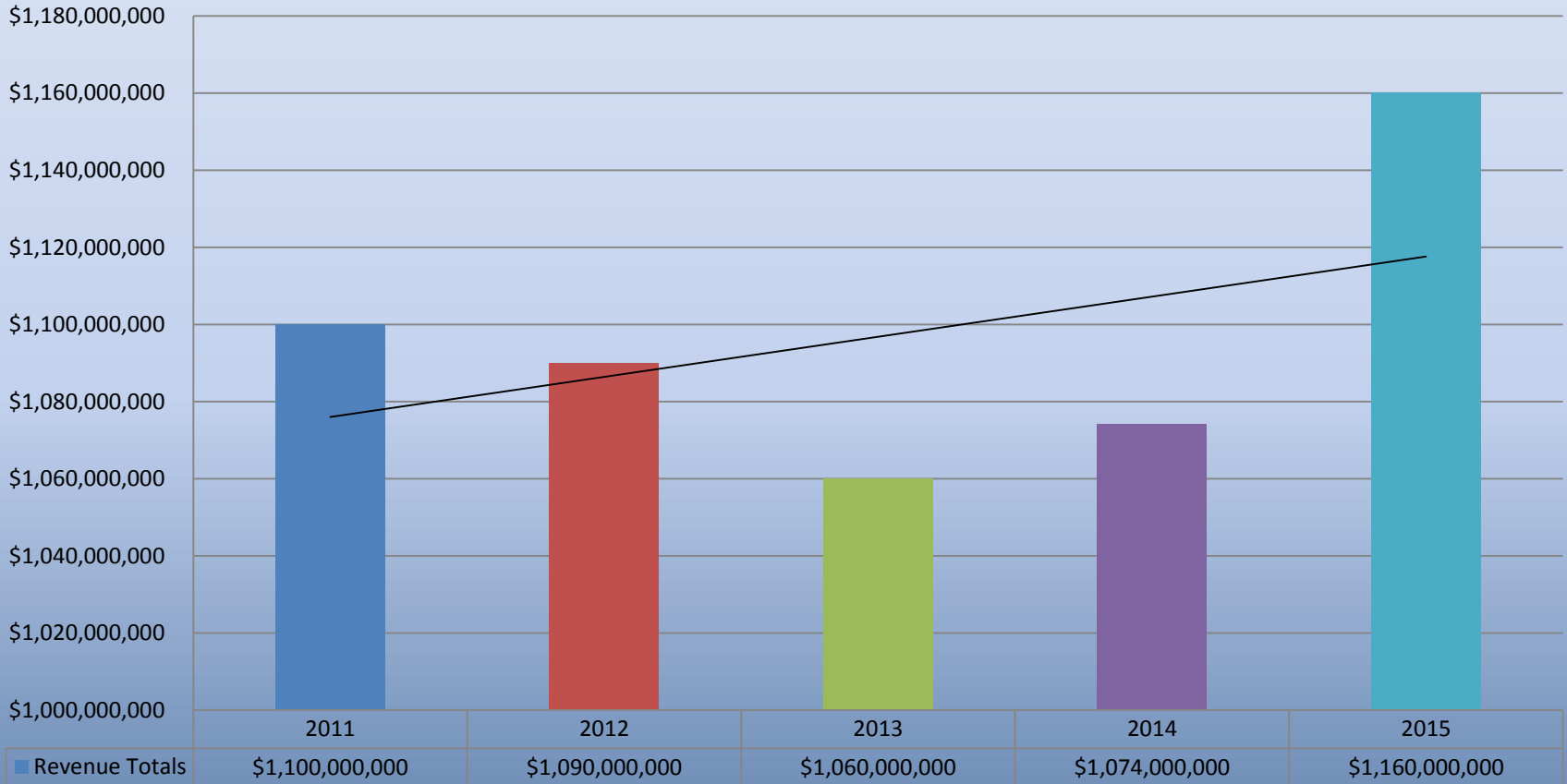
	Year End 2014	Year End 2013
North River Region	\$687,683,015	\$748,905,815
South River Region	\$307,866,406	\$326,594,658
Gulf Coast Region	\$1,078,635,757	\$1,066,855,458
Total	\$2,074,185,178	\$2,142,355,931



Mississippi Gaming Industry – 1st Quarter 2015

Region	1 st Quarter GGR	
North River Region	\$168,540,642	-11%
South River Region	\$86,464,499	<1%
Coastal Region	\$290,321,914	6%
Total	\$545,327,055	

Estimated Gulf Coast Gaming Revenue - 2015





Mississippi and Louisiana represent the
second largest gaming market in the United States:

Casinos: 47*

Total Slots: 55,364*

Table Games: 1,521*

Total Gaming Revenue: \$4.54 billion**

*Includes commercial casinos (43) and racetracks (4)

** \$4.54 billion is net of video poker revenue



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A Closer Look at the Mississippi Casino numbers...

Mississippi Gaming Impact on Overall State Tourism Indicators

Total Travel & Tourism Expenditures - \$6.086 Billion



Total Direct Employees - 84,225



Total State & Local Taxes - \$619 Million



75 Non-Gaming Counties



7 Gaming Counties

*Visit Mississippi Annual Report

Mississippi Gaming Industry Visitor State of Origin

	North	Central	Coast
Mississippi	23%	70%	32%
Tennessee	31.8%	.7%	1.7%
Alabama	5.3%	.7%	16.7%
Arkansas	17.5%	6.1%	.3%
Florida	-.8%	.3%	15%
Louisiana	-.4%	11.1%	17.5%

72.4%
= 3 states

81%
= 2 states

81.2%
= 4 states

*Mississippi Gaming Commission Quarterly Survey



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**Discussion of
Demographics between
a Casino Goer and a Tourist**

...

How can tourism boards work with casinos?

**Co-sponsoring events
Branding and Marketing**



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Collaboration between MS and LA

...

Discussion of Ideas / Regionalism



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**Questions or Comments
from Audience**

...



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