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Gaming and Tourism: Marketing Through Collaboration

Governor's Conference on Tourism
September 28-29, 2015

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MGHA is a 501(c)(6) non-profit association.

Our office is located
120 N. Congress Street, Ste. 420
Jackson, MS 39201
Website: www.msgaming.org

Larry Gregory, Executive Director
Michael Bruffey, Deputy Director

MISSISSIPPI MGHA GAMING & HOSPITALITY ASSOCIATION

MGHA Members

28 members

operating casinos – voting members

30 associate members

Businesses / associations – non-voting members

MISSISSIPPI MGHA GAMING & HOSPITALITY ASSOCIATION

Our Mission

Cooperating with government officials in advancing the gaming industry's common goals and objectives;

Promoting comprehensive and fair regulation of the gaming industry to insure integrity at all levels of operation;

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Advocating fair and reasonable taxation of the industry, which will permit operators to maximize employment opportunities and re-invest, expand and improve existing facilities

Promoting and participating in public education throughout Mississippi regarding the benefits of casino gaming, including job creation, economic development and how the industry can help the State in maximizing its tax revenues; and

Supporting and enhancing responsible gaming programs and offering education and assistance to individuals with gambling problems

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Resources for Data

www.msgaming.org

Annual Report

Monthly Newsletter

Studies & Analysis

Presentations

Southern Gaming Summit

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Annual Report 2015

Highlights of 2014

Tourism is

4th Largest Industry in Mississippi

84,225 jobs - $1.85 billion in labor income

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2014 Gaming Highlights

Gaming Revenue - $2.07 billion

Total Revenue - $2.8 billion

Jobs – 21,500 direct jobs

Unemployment Rate – 7.7%

Without Gaming – 11.7%

$106 million in advertising/promotions

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Gaming Generated $935 million in tax

$333 million in Federal taxes

$353 million in State & Local taxes

$248 million Gaming Taxes

- $84 million – local jurisdictions
- $36 million – bond sinking fund
- $127 million – general fund

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MS Gaming Taxes ($248 million) Support 6,200 Teaching Jobs or approximately 20% of Teachers in MS*

*Based on 32,000 teachers with an average annual salary of $40,000

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Challenges of our Industry

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Natural Disaster – Hurricane Katrina
August 29, 2005

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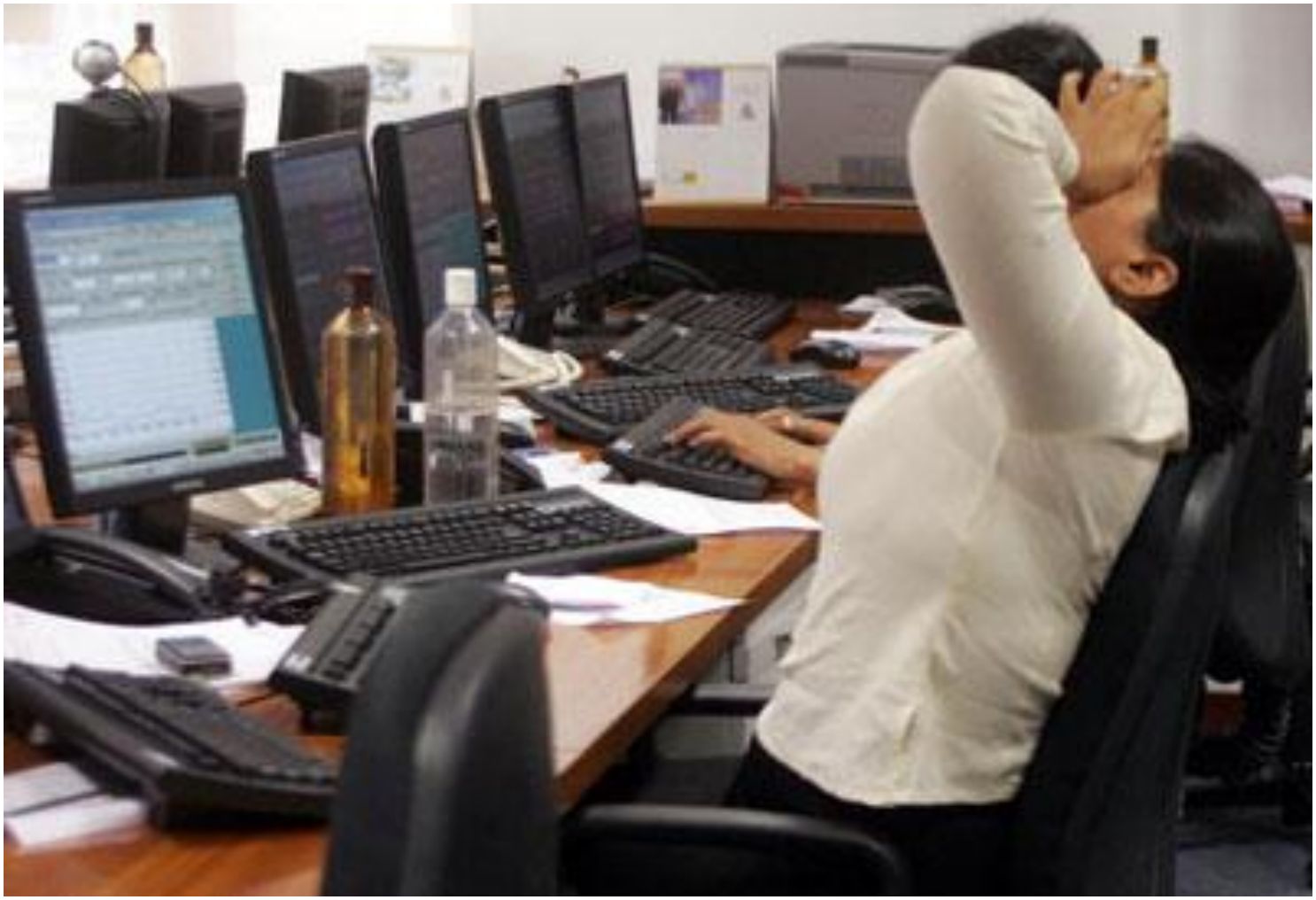
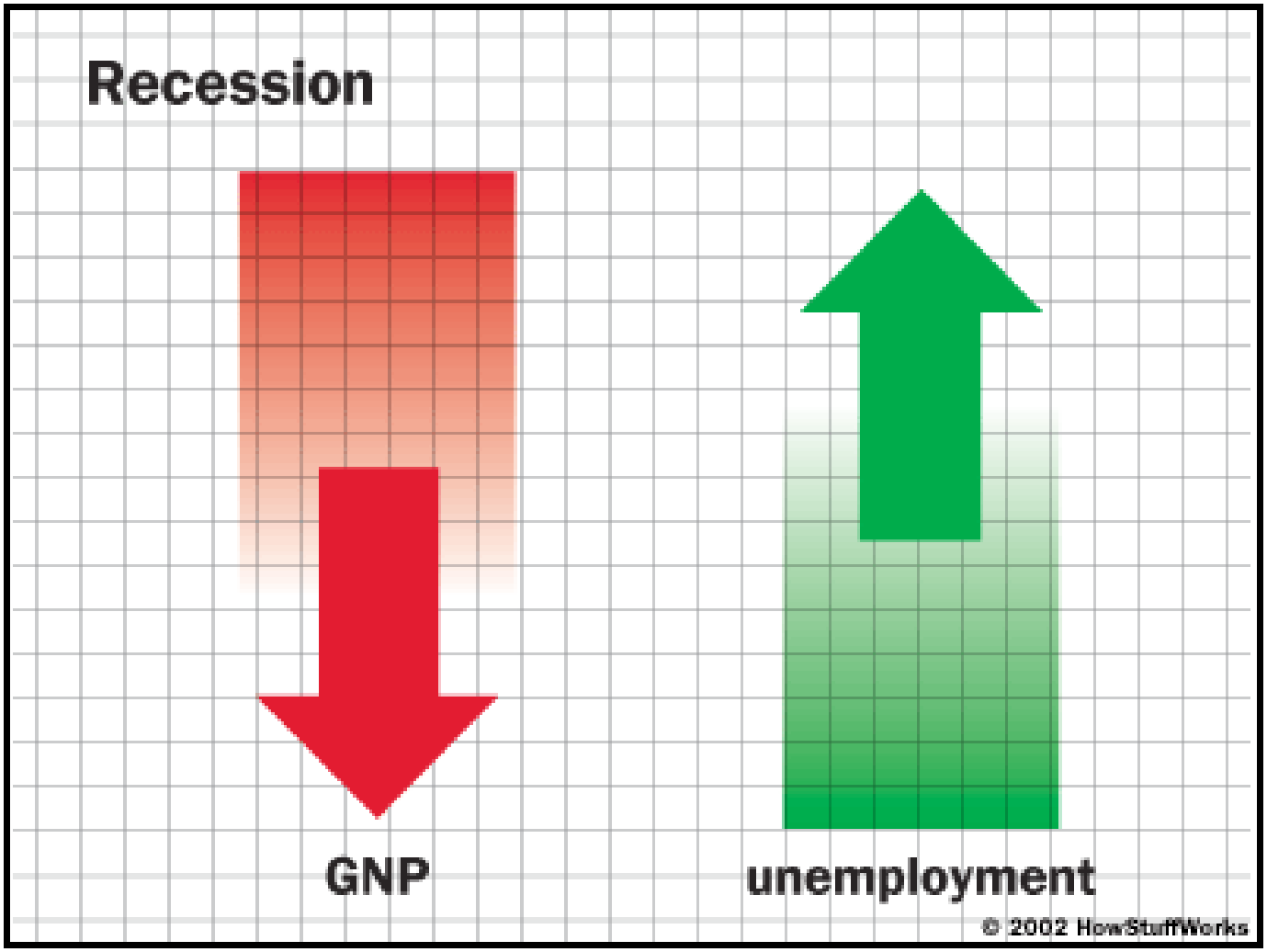
Recession Hits
September 2008



305-962-
Pedro Cuberos
305-491-0649
REDUCED
OWNER WANT TO SELL

imb
IndymacBank

GASOLINE
A Tesoro Company
Unleaded
3.89 9/10
Unleaded Plus
Unleaded Premium
Diesel #2
10


Recession
GNP
unemployment
© 2002 HowStuffWorks

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BP Oil Spill
April 2010

AFP/GETTY IMAGES/FILE

Courtesy of Yuki Kokubo. www.yukikokubo.com

BEACH
CLOSED

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Mississippi River Floods
May 2011

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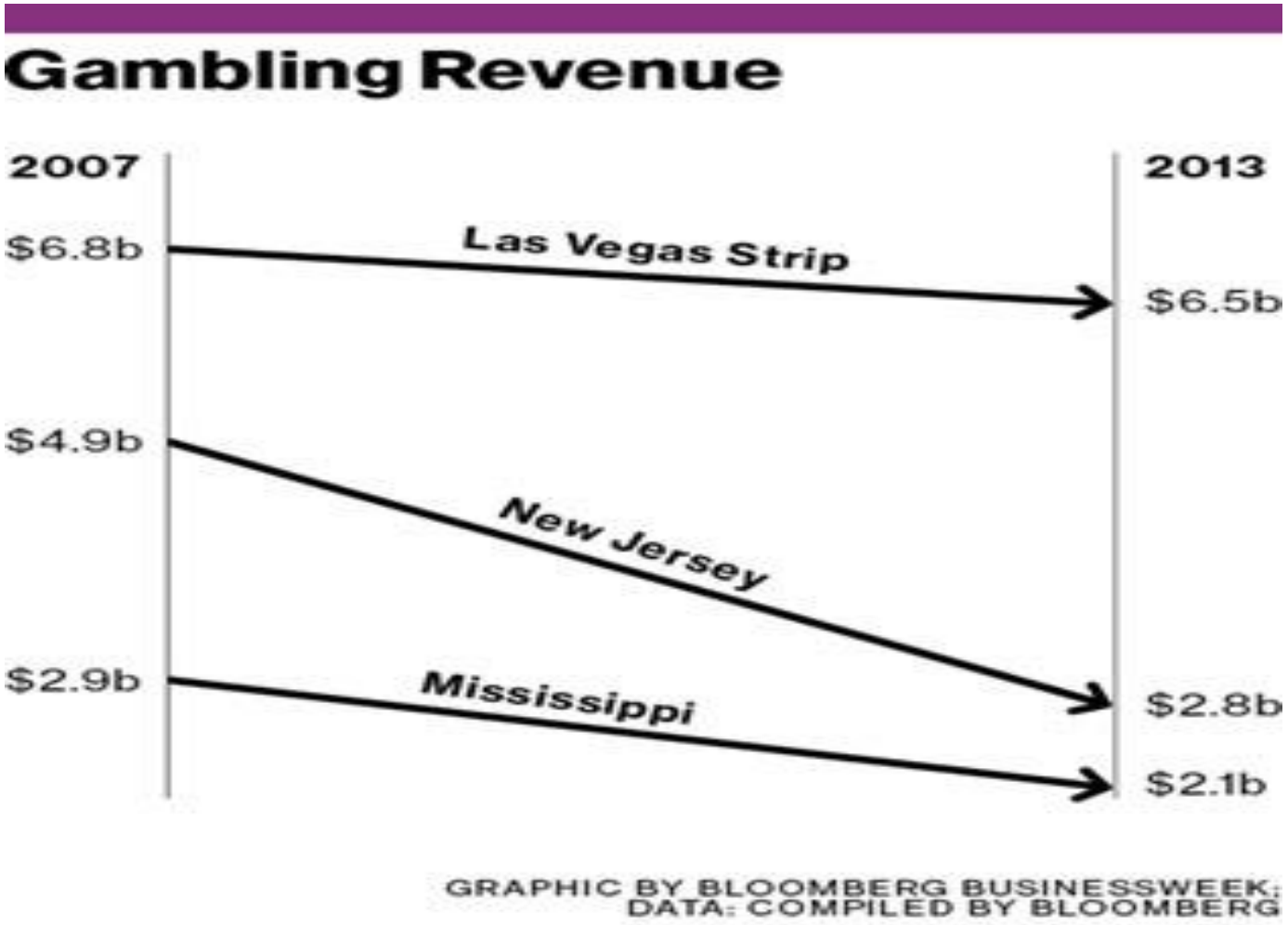
The Proliferation of Gaming Continues June 2015

Plain Ridge Slot Parlor opens Making Massachusetts 40th state to operate gaming facilities.

https://www.bostonglobe.com/metro/2015/06/21/casino-era-begins-massachusetts-with-jangle-slot-machines-plainville/oAdx1HoedNPBWL2FK4VuEJ/story.html

Image of Casino Floor Plan

Impact


Gambling Revenue
2007
2013
$6.8b
Las Vegas Strip
$6.5b
$4.9b
New Jersey
$2.8b
$2.9b
Mississippi
$2.1b
GRAPHIC BY BLOOMBERG BUSINESSWEEK;
DATA: COMPILED BY BLOOMBERG

Impact

5% Decline in LV

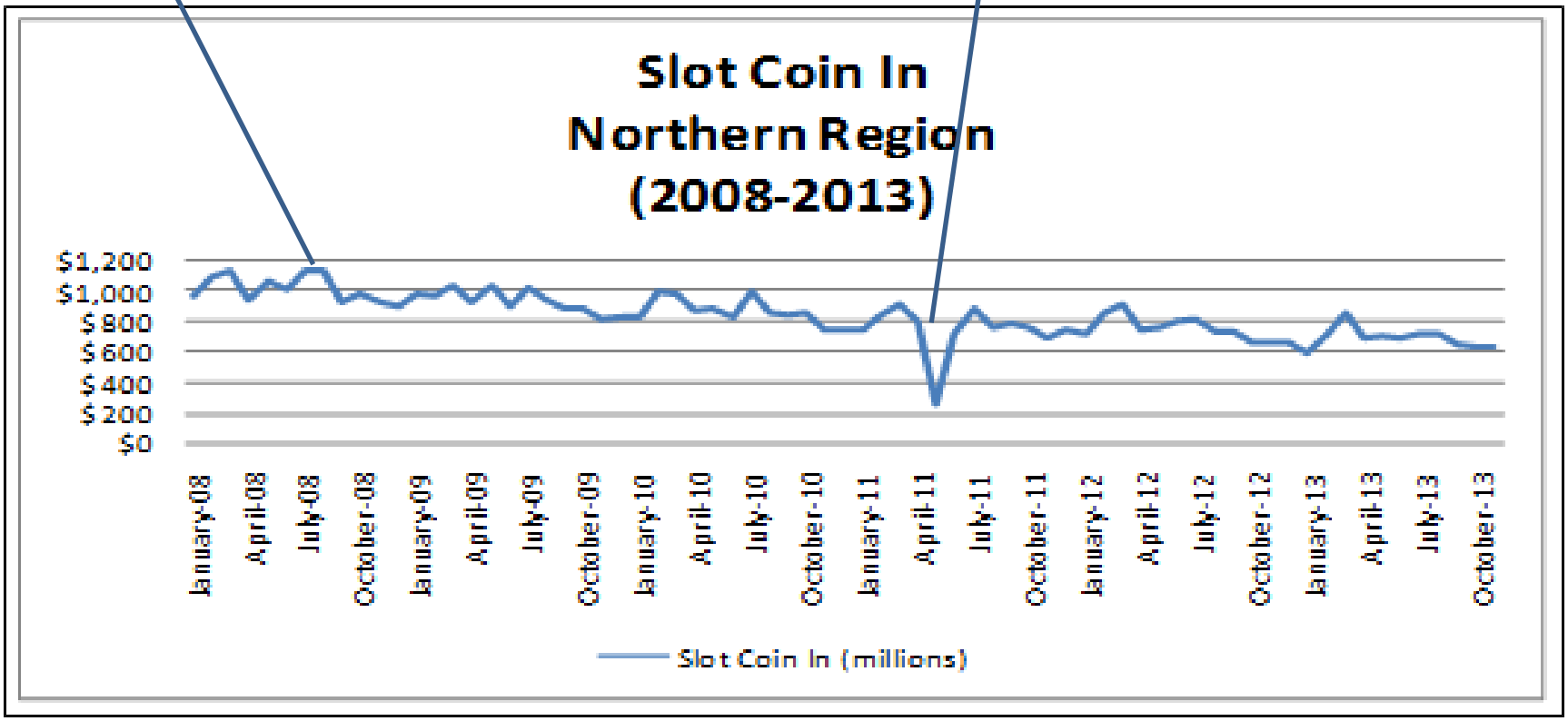
28% Decline in MS

43% Decline in NJ

Impact

Northern Region - Note the impact of the recession in 2008

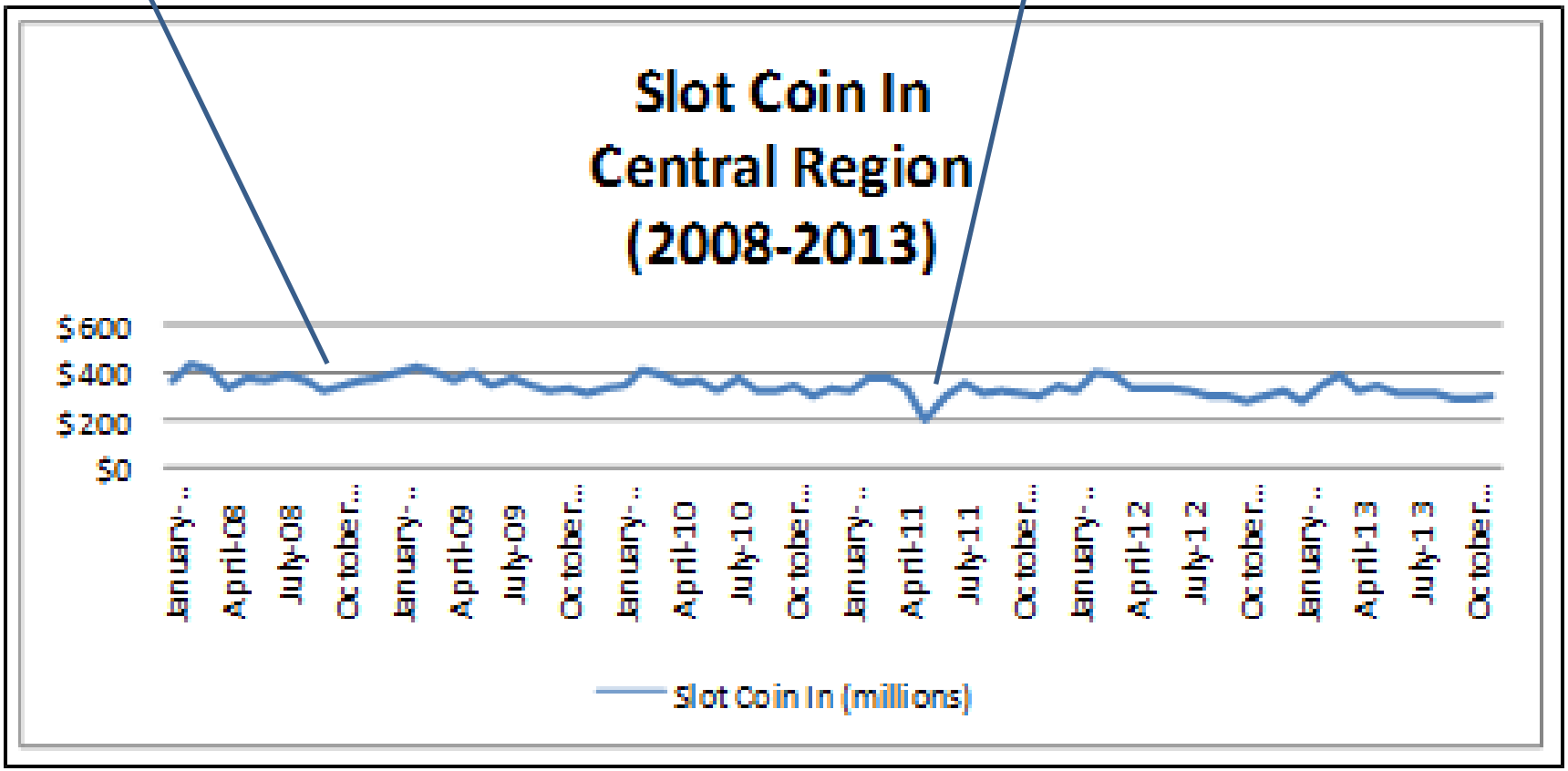
Note the “v” illustrating the 25 days the casinos on the river were closed.



Impact

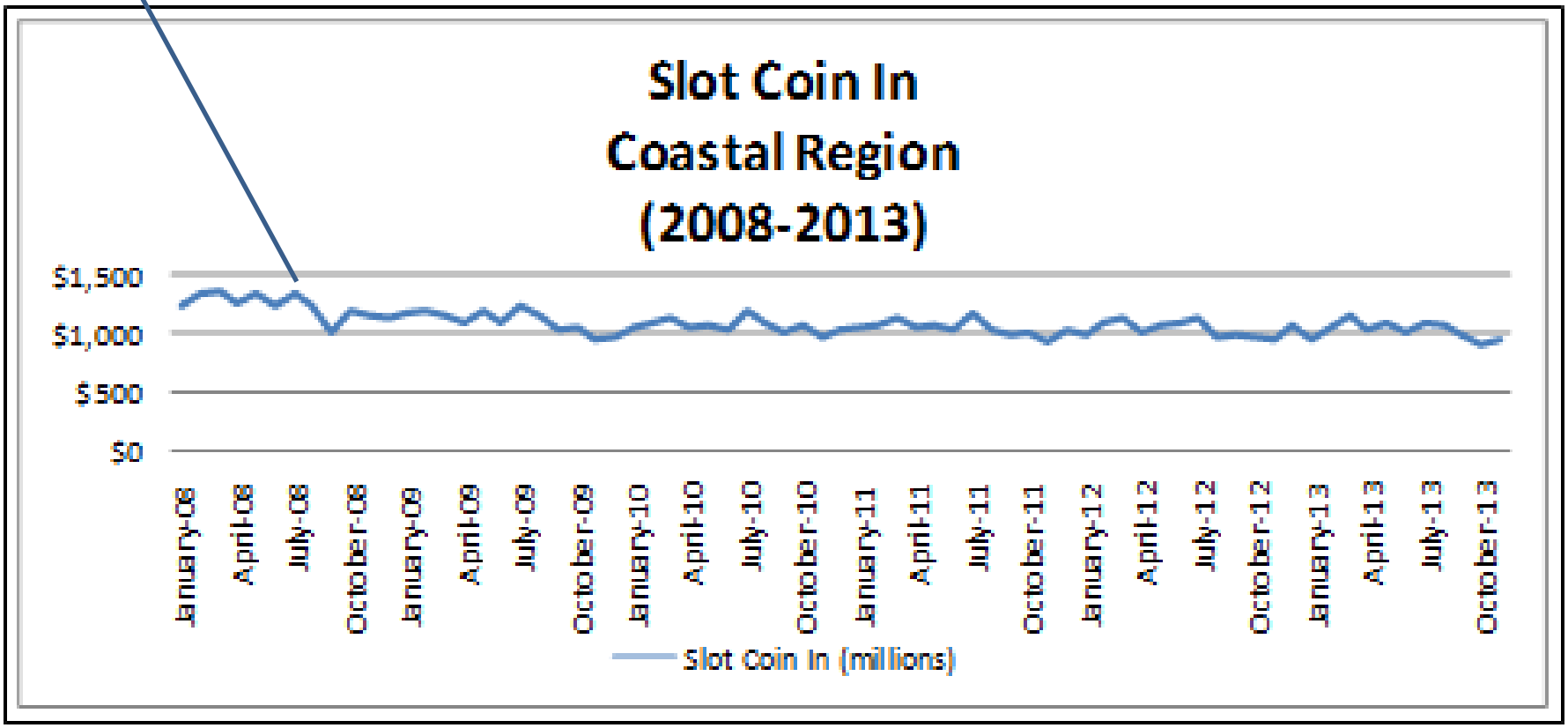
Central Region - The impact of the recession can be seen here as well.

The “v” is notable in the central region as well.



Gulf Coast – note the impact of the recession in 2008.

Impact



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Understanding Threat of "Convenience Gaming" and its impact on Visitation

2013 - AGA Reported

53% of Casino-Goers
enjoy activities outside the casino

The inverse of this statistic is that
47% of Casino-Goers do not

Thus, if a more convenient "gaming option" appears we stand to lose that customer visit

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A look at Mississippi visitation numbers…

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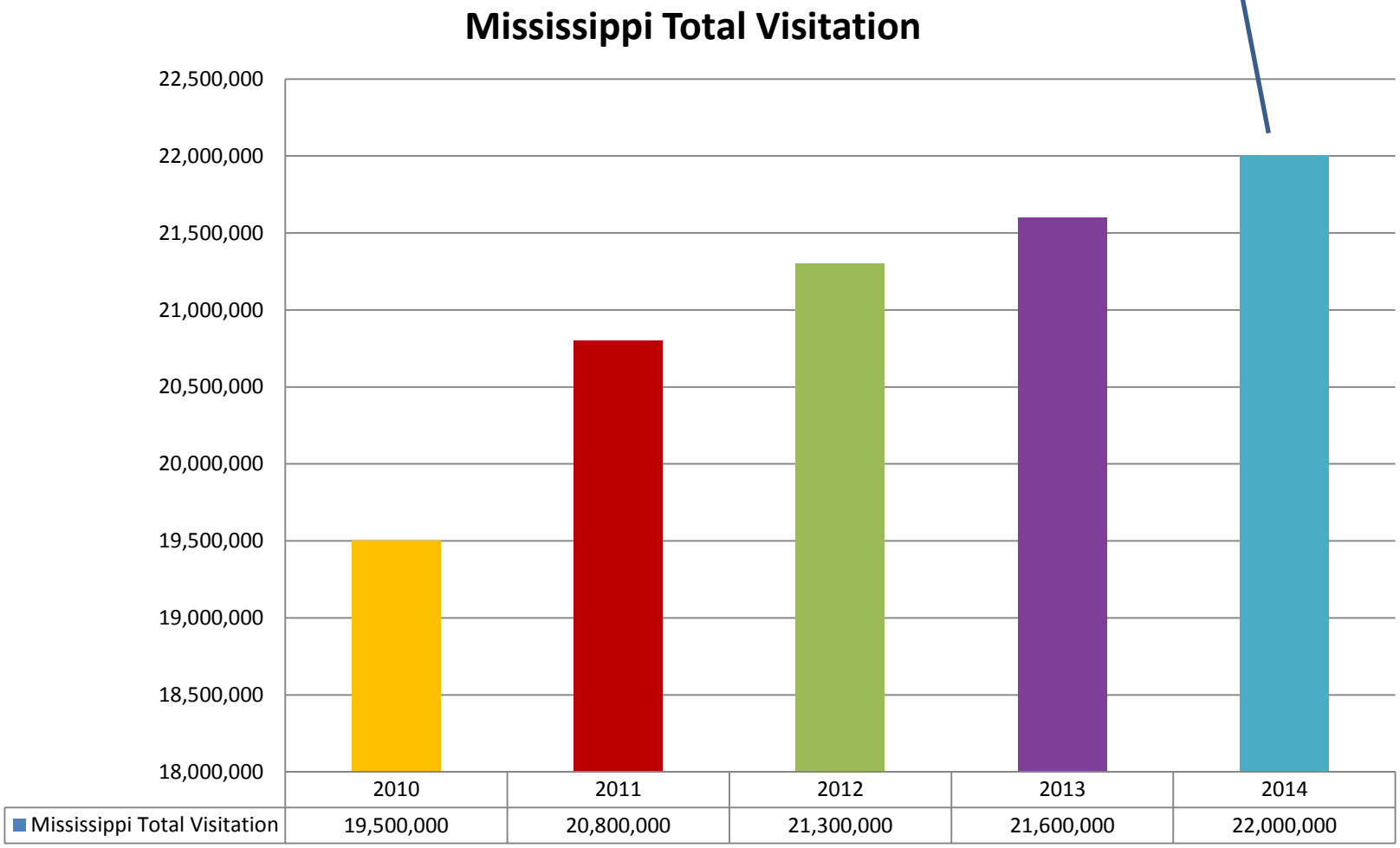
MDA Reports a steady increase in overall visitation to MS since 2010



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While MDA reports out of state visitation to Mississippi has been increasing each year, the gaming industry reports to MGC show a decline.

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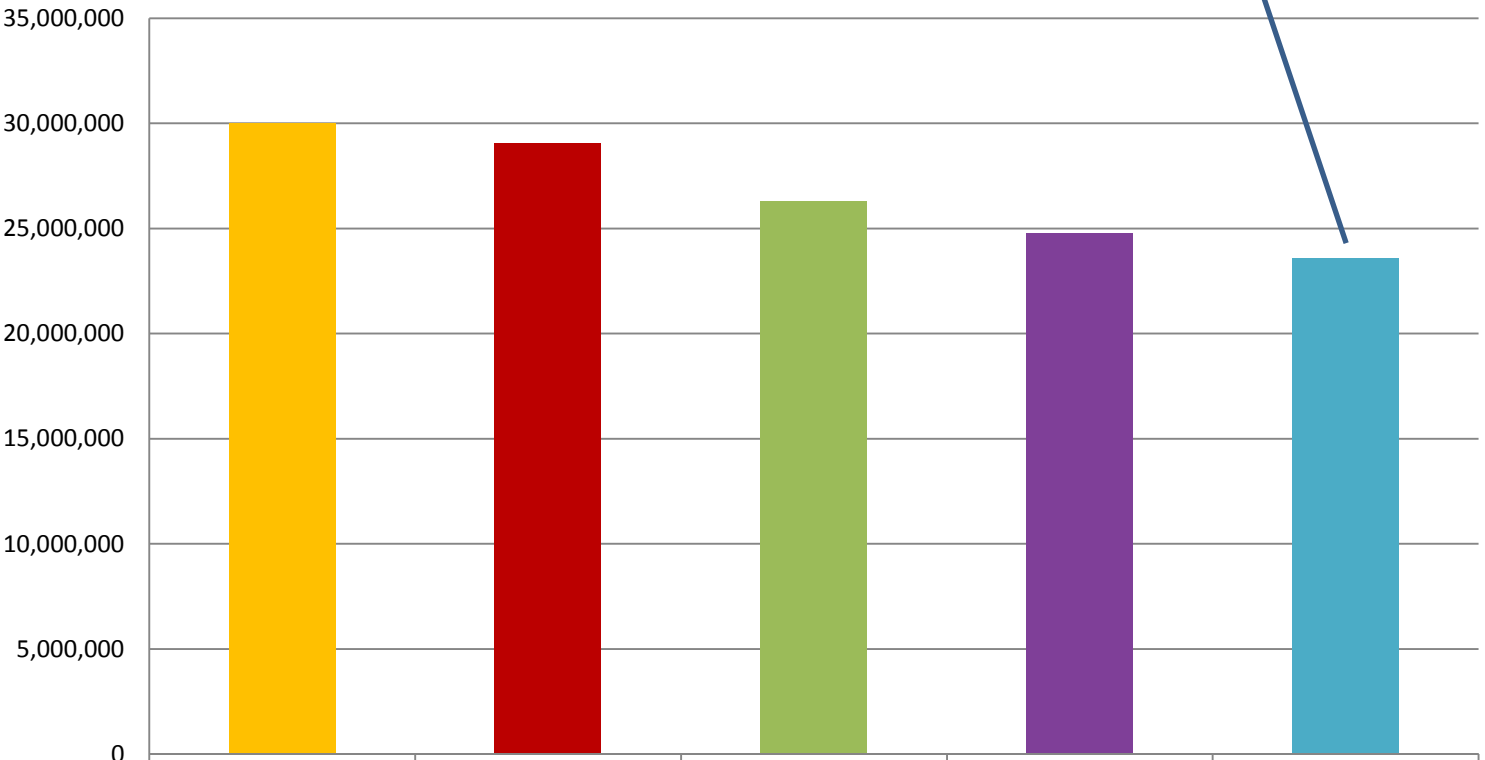
Out of state visitors in 2011 = 20 million compared to 15 million in 2014

Mississippi Total Casino Visitation



	2010	2011	2012	2013	2014
Mississippi Total Visitation	30,000,000	29,046,941	26,300,000	24,776,610	23,565,378

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Regional Map

2014 Annual Report

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Northern Region - 2014

5.2 million visitors

70% of visitors to this region come from Outside MS

6,500 direct employees

Key States: AR/TN= 50% of out of state visitors

42% decline in out of state visitation from AR/TN

AGR $687 million

Total Revenue $936 million

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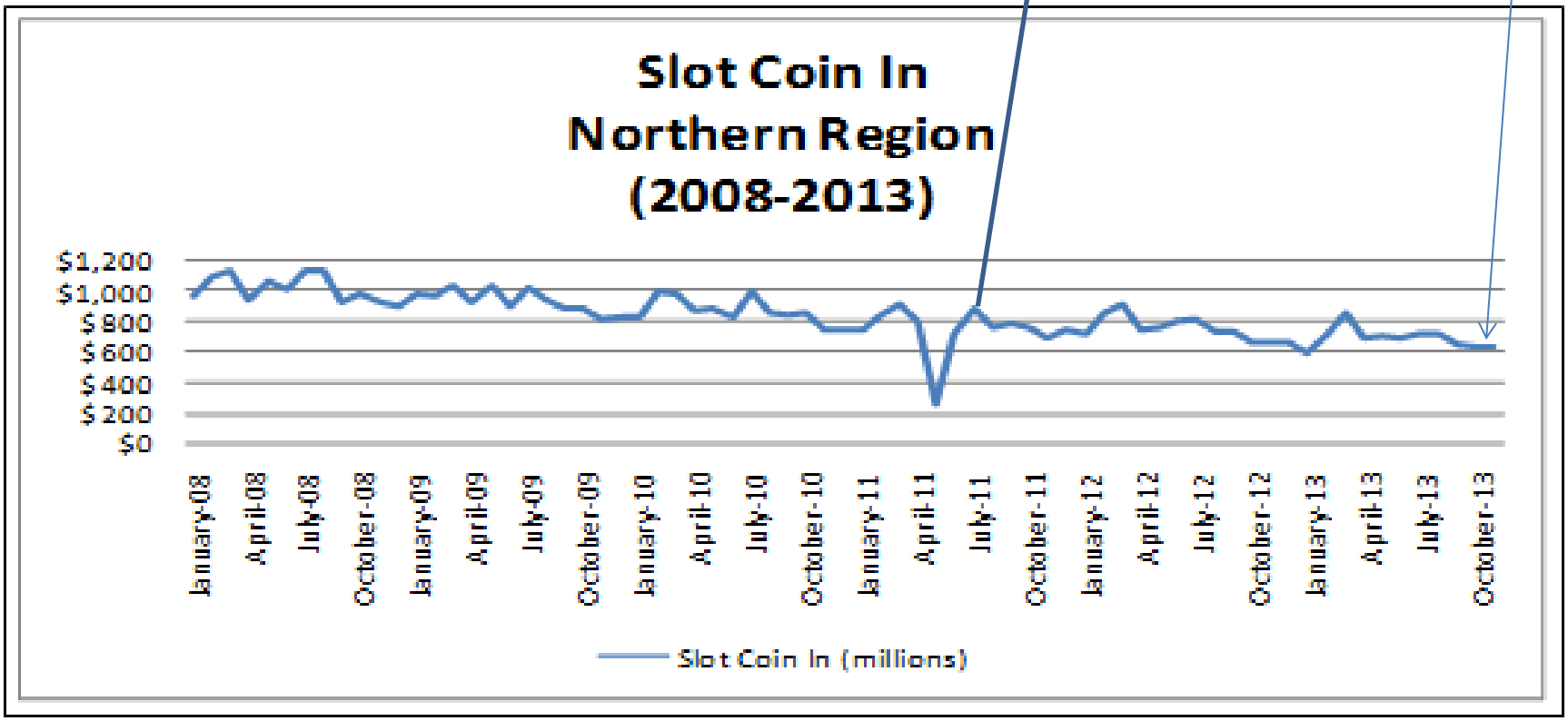
Northern Region
Out of State Visitation Trends since 2011

Arkansas 2011 (1.8 million) → 2014 (1.1 million)
Tennessee 2011 (3.3 million) → 2014 (1.8 million)

42% decline (from 50% pool)

Impact

Northern Region – After the floods, visitation from AR/TN continued to decline directly impacting business volumes



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Central Region - 2014

3.08 million visitors

70% of visitors to this region come from Within MS

3,000 direct employees

Key State: LA = 15% of visitors

23.4% decline from LA

AGR $307 million

Total Revenue $387 million

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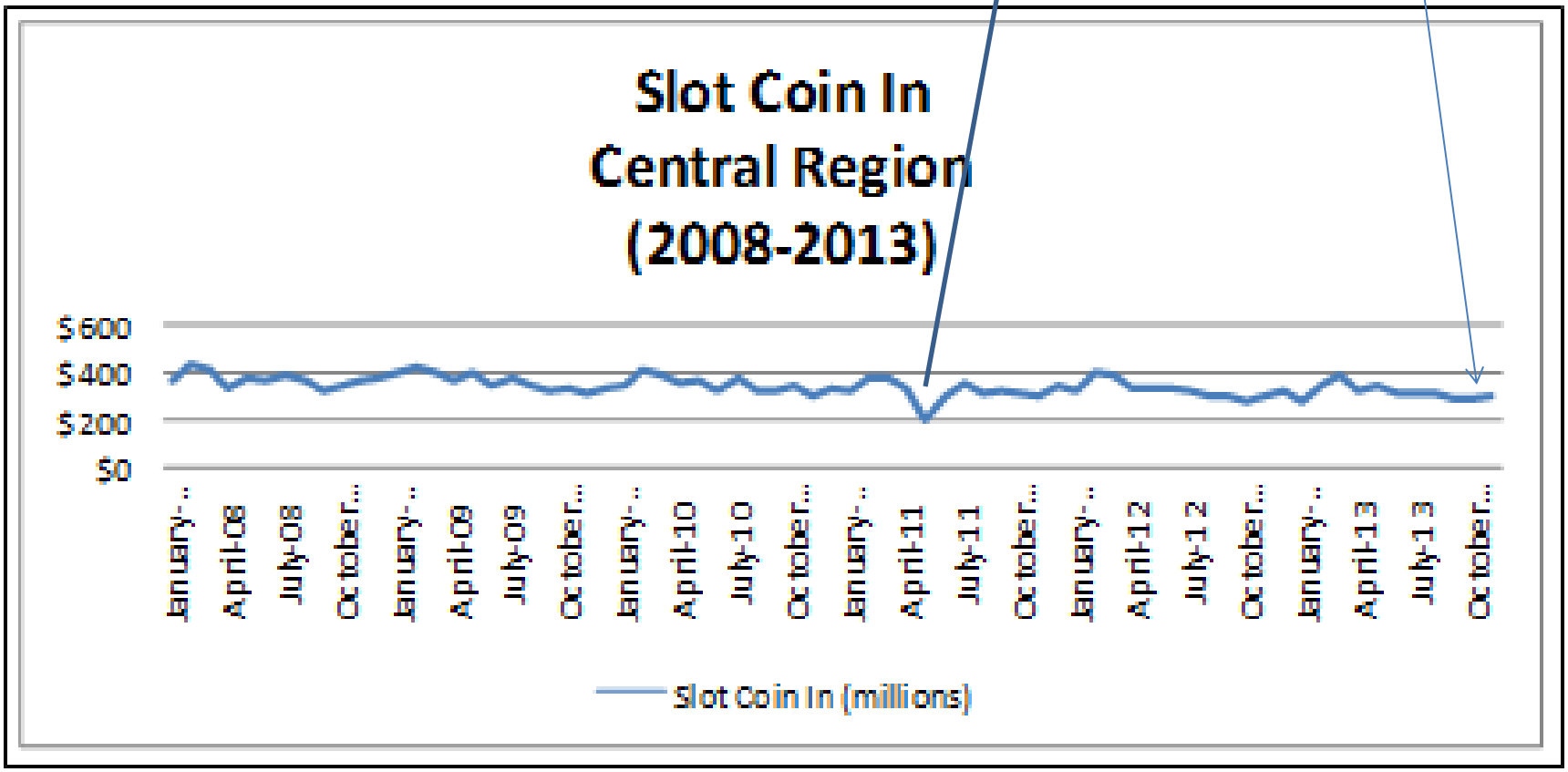
Central Region
Out of State Visitation Trends since 2011

Louisiana 2011 (4.253 million) → 2014 (3.260 million)

23.4 % decline (from 15% pool)

Impact

Central Region – Notably, after the floods, the central region has had difficulty in driving up business volumes.



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Gulf Coast Region - 2014

15.3 million visitors

66% of visitors to this region come from Outside MS

12,000 direct employees

Key States: AL, FL, GA, LA = 50% of visitors

14.4 % decline in visitation from these 4 states

AGR $1.08 billion

Total Revenue $1.535 billion

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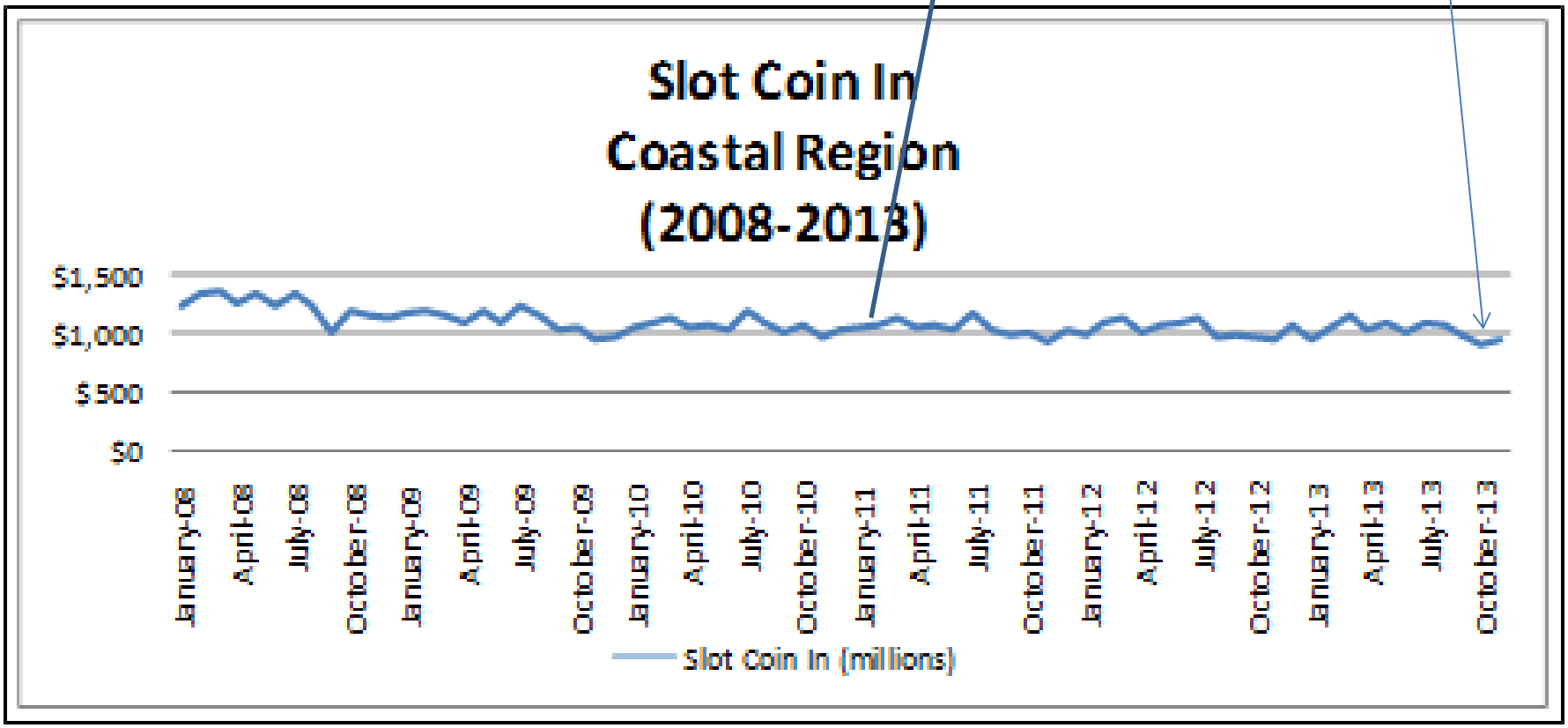
A Closer Look at
Gulf Coast
Out of State Visitation Trends Since 2011

Alabama 2011 (2.971 million) → 2014 (2.845 million)
Florida 2011 (2.504 million) → 2014 (2.361 million)
Georgia 2011 (1.364 million) → 2014 (1.032 million)
Louisiana 2011 (4.253 million) → 2014 (3.260 million)

14.4 % decline (from 50% pool)

Impact

Gulf Coast – The slight declines in visitation can be seen in the slight declines in business volumes.



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Discussion of River Counties Today

17 Casino Operators
In 2014, over $1.3 billion in total revenue
9,500 jobs
Visitation – 8.3 million
Websites:
www.visitthedelta.com
www.tunicatravel.com
www.visitmississippi.org

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Discussion of Gulf Coast Today

11 Casino Operators
In 2014, over $1.5 billion in total revenue
12,000 jobs
Visitation – 15.3 million
Websites:
www.gulfcoast.org
www.visitmississippi.org

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Gulf Coast 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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Gulf Coast 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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Impact of Capital Investment

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Mississippi Gaming Numbers
Year End 2014

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Significant for two reasons:

1. First YOY increase along Gulf Coast since 2007
2. First time the Gulf Coast revenues ($1.078 bil.) have exceeded River Counties ($995 mil.)

MGC General Conclusions and Specifics 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

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Mississippi Gaming Numbers
1st Quarter 2015

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Keep in mind 2014 was first YOY increase since 2007; now 2015 revenues are exceeding 2014 by 6%

MGC Report Results
1st Quarter 2015

Region	1st 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	

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Trend for 2015
Based on 1st Quarter Results

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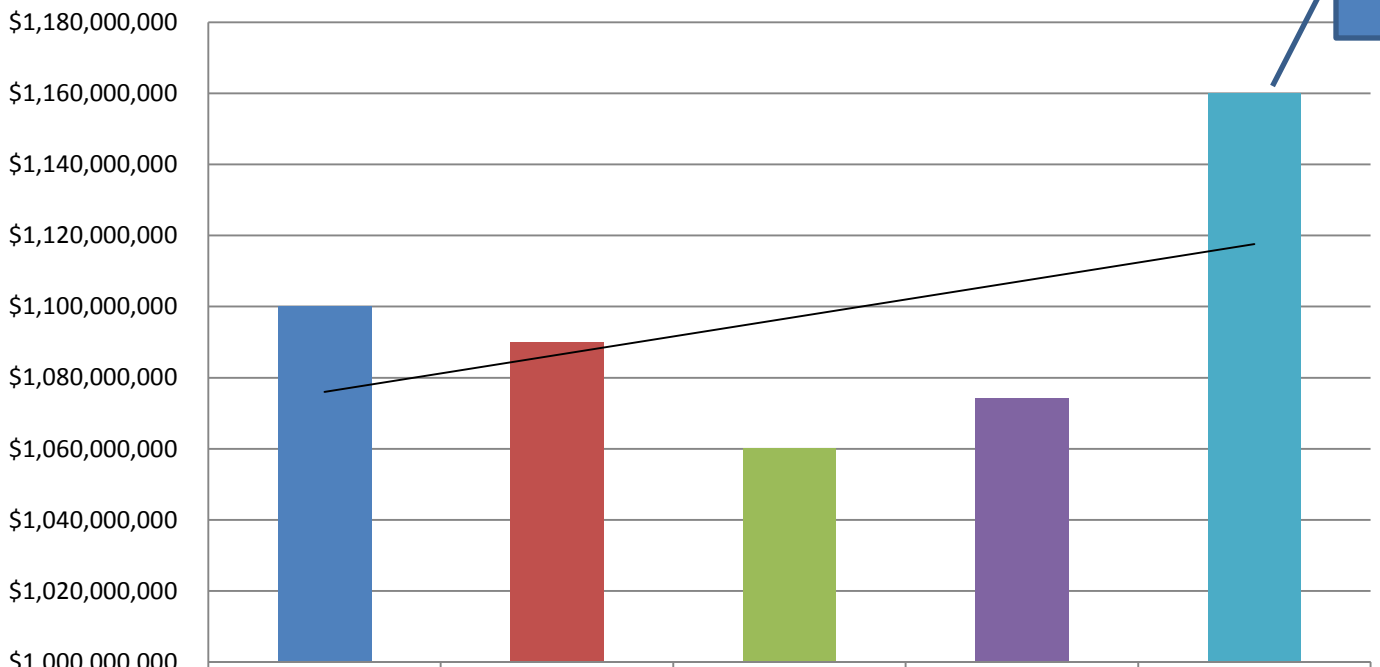
If this trend continues the Gulf Coast will be approaching 2008 revenue numbers

Estimated Gulf Coast Gaming Revenue - 2015



	2011	2012	2013	2014	2015
Revenue Totals	$1,100,000,000	$1,090,000,000	$1,060,000,000	$1,074,000,000	$1,160,000,000

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Let's Compare 2015 with A Look Back at 2007 "The Best of Times"

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Along the Gulf Coast – Aug 2015 exceeds Aug 2014 by $3 mil. = 3%
How does it compare to Aug 2007?

	August 2015	August 2014
Tunica Region	$51,007,085	$58,111,766
Lower River Region	$24,246,286	$25,198,269
Coastal Region	$97,411,431	$94,551,749
TOTAL	$172,664,802	$177,861,784

	Year to Date 2015	Year to Date 2014
Tunica Region	$445,695,295	$476,593,864
Lower River Region	$215,705,372	$212,433,713
Coastal Region	$782,769,592	$730,153,829
TOTAL	$1,444,170,259	$1,419,181,406

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$109 million - Aug 2007
compared to
$97 million - Aug 2015
About 10% less
How about YTD?

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Best August ever for casinos

State's take for year hits $1.98 billion

By MARY PEREZ
meperez@sunherald.com

Coast casinos celebrated the 15th anniversary of gambling in Mississippi by posting their best August on record with $108.9 million in gross gaming revenue.

In July, boosted by the blockbuster opening of Hard Rock Casino, the Coast set an all-time one-month record of $124.7 million. That dropped 12.7 percent in August but still topped the $105.9 million previous August high set in 2004. When Hurricane Katrina closed all the casi-

29, 2005, the revenue for August was $105.9 million.

"It doesn't really surprise me," said Beverly Martin, executive director of the Gulf Coast Gaming Association, of August's lower revenue. "That's kind of typical," she said, because school locally starts in early August and tourists and "voluntourists" are also occupied with back-to-school. "It really does affect the tourist season," she said of starting school before Labor Day.

Revenue also sagged at casinos in Mississippi's river counties in August, slipping 8.5 percent from $143 million to $130.9 million. With both the Coast and river casinos lower, the state revenue dropped almost $28 million from July to August.

The total state revenue so far this year stands at $1.98 billion, making the goal of $3 billion by the end of 2007 still attainable with a third of the year remaining.

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The positive numbers are creating a buzz beyond the regional market of neighboring states where the casinos traditionally market. Bruffey said the expansion of Gulfport-Biloxi International Airport and more non-casino attractions are key to expanding the marketing area of the casinos well beyond the Coast.

With casinos building and still rebuilding, "We'll be able to tell more when we look at next month's trends," Martin said. "We're anxious to see how November is when the bridge opens. We just don't know," she said, whether the reopening of the Biloxi Bay bridge after more than two years will bring higher prof-

Gross Gaming Revenue

For Gulf Coast counties.

Jan.'07	$106.9 milli
Feb.	$109.7 milli
Mar.	$117.6 milli
Apr.	$107.2 milli
May	$104.8 milli
June	$107.7 milli
July	$124.7 millio
Aug.	$108.9 milli
YTD TOTAL	**$887.0 MILLI**

*All-time record for Coast Gaming revenue

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Gulf Coast Revenues YTD exceed 2014 by $52 million or 7%
How about compared to 2007?

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Gulf Coast numbers were $887 million thru Aug 2007 v. $783 million thru Aug 2015
About 12% less
How do we compare on statewide basis?

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Business B-8
www.sunherald.com/business TUESDAY, SEPTEMBER 18, 2007

Best August ever for casinos

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MISSISSIPPI MGHA GAMING & HOSPITALITY ASSOCIATION

On a statewide basis we are exceeding 2014 by $25 million. About 2%
Compared to 2007 YTD?

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$1.98 billion thru Aug 2007 v.
$1.444 billion thru Aug 2015
$554 million less or 26%

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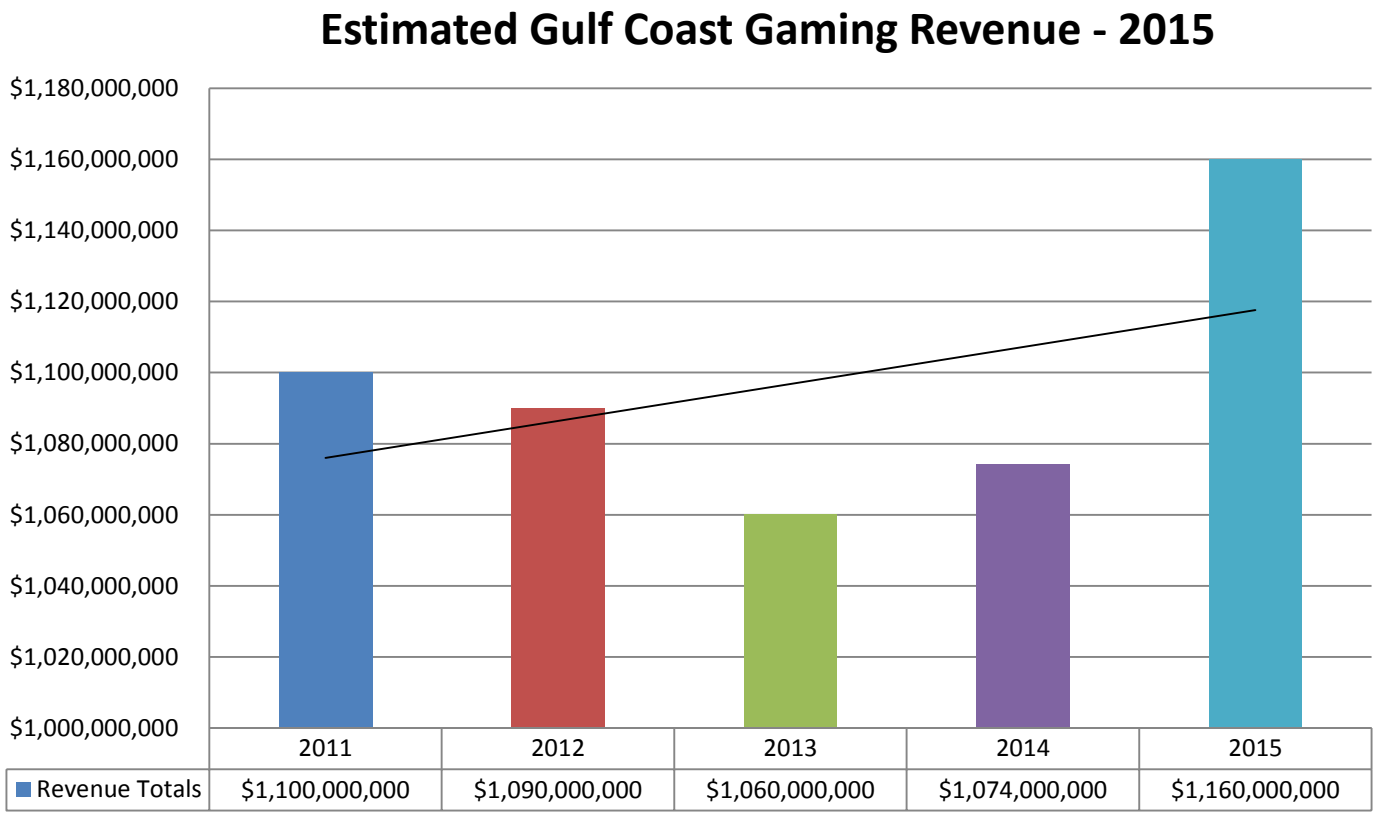
This Trend Looks Good, but…



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We are still facing a 26% decline in statewide revenue compared to 2007

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How Can We Continue to Reduce this Gap?

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Gaming Tourism Collaboration

More Visitors to Mississippi =

More Spend

More Jobs

More Tax Dollars

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MDA Tourism Reports
22 million visitors to MS

Casino Operators Report
15.3 million out of state visitors

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MDA Tourism Budget
Marketing $3.2 million

Casino Operators Report
Spending $106 million in
advertising and promotions

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Gaming Tourism Roundtable

Panelists:
John Hairston
Misty Shaw
Webster Franklin
Renee Arenge
Rick Taylor

Discussed

5 Drivers of Visitation

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A Strategic Approach

5 Drivers of Visitation

Gaming

Non-Gaming Amenities

Special Events

Marketing

Access

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Discussion of Different Visitation Drivers:

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Casinos

2014 Key Statistics

"Convenience Gaming" has taken toll on visitation with 15 million out of state visits compared to 20 million in 2011.

Gaming provides 21,300 direct jobs and generates over $935 million in tax revenue.

Casinos have invested billions into our state supporting numerous businesses.

AGA Annual 2013 Report

53% of visitors to casino engage in activities outside casino

65% in a younger demographic → know your customer

We must be able to compete for Millennials

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What is Needed To Compete for Millennials:

Skill Based Games

Online Gaming

Fantasy Sports

Sports Betting

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Non-Gaming Amenities

2011 PWC Study

Emphasis on adding Non-Gaming Amenities in Tunica

2014 MS Casino Total Revenues: $2.86 billion

Gaming: $2.08 billion

Non-Gaming $780 million = 27%

Non-Gaming presents opportunity for growth.

Last year, for the first time, more dollars spent on non-gaming than gaming in Las Vegas.

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*.

Scarlett Pearl to Open Dec. 9 – with 36 hole championship putt-putt golf

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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*

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Special Events Cont.

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.*

Marketing

Regionalism (One Coast)

CVBs, MTA and MDA Tourism

Direct Spend Ratios

MS - $12.93 to $1 on advertising

LA - $17 to $1 on advertising

Raleigh Durham - $25 to $1 advertising

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TUNICA AIRPORT

Access

Drive In Customers

Road Maintenance

Gateways / Beautification

MDOT

iFlyJackson.com
Mississippi's Gateway to the World

Air Service

Low cost carrier

Provides Customers with Access

Makes pricing more affordable

Gulfport-Biloxi International Airport
We Make Flying Easier.

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MSAs with Soundest Economic Strength Indicators

Low Tax Rates

Reasonable Labor Costs

Public Private Investment

http://msgaming.org/leading-locations-for-2015-the-msas-with-soundest-economic-strength-indicators-area-development/

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Mississippi Follows Sound Principles for Economic Strength

Among the Lowest in US in Gaming Tax Rate

Reasonable Labor Cost

Supports Public Private Investment

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General Government Support

Government Support with 5 Drivers of Visitation

Gaming – No Tax Increase

Non-Gaming Amenities – Investing in Public-Private

Special Events – General Support (Appear)

Marketing – Funding for MDA, MTA & CVBs

Access – Funding for Air Service &

Road Maintenance/Gateways

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Together

the Gaming Industry and the Tourism Industry
can work to

INCREASE
VISITATION TO MISSISSIPPI

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More Visitors to Mississippi =

More Spend

More Jobs

More Tax Dollars

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Gaming & Government Action

The Fight Against Illegal Gaming

http://msgaming.org/aga-convenes-illegal-gambling-advisory-board/

Illegal sports betting

Black market machines

Internet sweepstakes cafes

Illegal online betting

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Discussion & Questions

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