



MISSOURI GAMING
ASSOCIATION

STATE OF THE INDUSTRY 2015



The 13 casinos in Missouri contribute \$3.3 billion in economic activity, according to an American Gaming Association (AGA) report on the gaming industry's significant economic impact. The report shows that Missouri's gaming industry:

- Contributes \$3.3 billion to the Missouri economy;
- Supports 20,122 Missouri jobs, which pay nearly \$837 million in wages;
- Generates \$969 million in local, state and federal tax revenues, including \$452.2 million in gaming taxes alone.

The data assembled by Oxford Economics included direct, indirect and induced economic impacts based on 2014 data. Read the full report at www.gettoknowgaming.org/by-the-book.

Casino Capital and Community Investments



Capital Improvements - Harrah's North Kansas City added two restaurants, increased convention space, refurbished the hotel tower, and refreshed the casino with new carpet and game room enhancements. Isle of Capri Boonville recently completed a hotel and ballroom renovation in time for their 15th anniversary in 2016. Mark Twain Casino also is celebrating its 15th year.

The Pavilion At Lemay - Pinnacle Entertainment provided a generous donation and hosted the grand opening of the \$11 million Pavilion at Lemay, a recreation and aquatic center opened in June 2015 by the St. Louis County Port Authority and St. Louis County Parks & Recreation.

Missouri Gaming Ranks High

According to the Missouri Gaming Commission (MGC), Missouri ranks 9th in total state gaming tax revenue and 8th in consumer spending on commercial casino gaming. The St. Louis/Southwestern Illinois region is the 7th largest casino market in the U.S.; and the Kansas City region is the 11th largest (based on 2014 AGR).

Economic Impact Since 1994

- \$5.9 billion for educational programs (elementary, secondary and early childhood)
- \$3 billion in capital investments in Missouri since gaming began here
- \$827.8 million to all causes supported by admission fees including \$251.9 million for veterans programs

Casinos – Missouri's Highest Taxed Industry

Missouri is one of the highest-taxed casino jurisdictions in the country, paying a *net effective tax rate of 26.3% off the top, in addition to other business taxes*. That effective rate includes a 21% gaming tax (90% goes to the state, 10% to home dock communities), \$2 per patron admission fees paid by casinos (split by the state and the communities), plus reimbursements to the state.

Casino tax revenue is one of Missouri's top sources of tax revenue. Missouri's 13 casinos contribute more to the state in *gaming tax revenue alone* than the corporate income tax paid by all 165,000 Missouri businesses combined, plus casinos generate many millions more in annual corporate income, property and sales taxes.



ECONOMIC IMPACT FY 2015



\$510 million
Total taxes & fees* plus
reimbursements to MGC
* Includes real estate & sales tax



\$318 million
Gaming tax revenue for the
School Foundation Formula



\$320 million
Wages and tip income

9,623
employees



47%
Female



40%
Minority



\$361 million
To the state in taxes
and admission fees



\$79.1 million
To the host communities in taxes
and admission fees



\$1.7 billion
Adjusted Gross Revenue



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The Missouri Gaming Association is the professional organization representing the Missouri casino industry.

www.missouricasinos.org

GAMING REVENUE BENEFITS MISSOURI \$488 million FY 2015



\$317.9 million School Foundation Formula



\$79.7 million Host Cities



\$26.8 million Veterans Commission Trust Fund



\$17.6 million MGC Expenses*



\$5 million Access Missouri Financial Assistance Program



\$4 million Missouri National Guard Trust Fund



\$80,000 Compulsive Gamblers Fund

*Direct Reimbursements to cover Missouri Gaming Commission expenses that are not covered by casino licensing fees and admission fees.

2016 OFFICERS

PRESIDENT
Barron Fuller, Isle of Capri Boonville

VICE PRESIDENT
Chris Plant, River City Casino & Hotel

SECRETARY
Todd George, Hollywood Casino

CASINOS SUPPORT COMMUNITIES

Missouri casinos donated \$1,137,460 in cash and in-kind donations in 2015, and casino employees volunteered many thousands of hours to help community organizations.

HARRAH'S NORTH KANSAS CITY

Harrah's North Kansas City and the Caesars Foundation donated \$212,000 to more than 40 local organizations. Harrah's celebrated the 20th anniversary of "Cars 4 Christmas" with a \$20,000 donation to provide reliable transportation for families and veterans in need. Harrah's employees also volunteer through HERO (Harrah's Employees Reaching Out), supporting Northland Meals on Wheels, Families of Fallen Soldiers in Ft. Leavenworth, the Don Bosco Centers, the Rosebrooks Center, and 60 other organizations.



ISLE OF CAPRI CASINO

Isle of Capri Casino's Community Aces Challenge, a company-wide social media event, raised \$35,000 to fund grants for the Caruthersville Humane Society, the Humane Society of Southeast Missouri, the Down Syndrome Guild of Kansas City, and Skills to Succeed.

AMERISTAR ST. CHARLES RIVER CITY CASINO & HOTEL

Ameristar Casino Resort Spa St. Charles donated \$25,000 to The Hammond Institute Duree Center for Entrepreneurship at Lindenwood University, funding 100 full scholarships for adult business-owners and potential entrepreneurs. The partnership allowed Ameristar to help both potential entrepreneurs and North St. Louis County's rebuilding and healing efforts.

The second annual Gingerbread House Dining Experience at Ameristar Casino Resort Spa St. Charles and River City Casino & Hotel raised more than \$9,600 for the Center for



Hearing & Speech, the largest single donation the Center received last year. More than 1,500 guests dined in the giant edible gingerbread houses created with 1,700 pounds of gingerbread, 600 pounds of powdered sugar and 600 hours of team labor.

Team members from Ameristar St. Charles and River City raised \$36,700 for Soldier's Angels and Wounded Warriors and donated more than 5,000 care package items for local veterans and active military personal overseas.

AMERISTAR KANSAS CITY

Ameristar Casino Hotel Kansas City hosted "Savor the Flavors," a cocktail party and chef's challenge to raise funds for the Don Bosco Centers. The event featured friendly competition among Pinnacle Entertainment's world-renowned celebrity chef Keith Keogh, Ameristar Kansas City's Executive Chef Jerrold Brooks and five Kansas City restaurant chefs.

For the 10th year, the casino's culinary team prepared a traditional Thanksgiving dinner and team members served the meal to 300 seniors and adults with disabilities at Don Bosco Senior Center.



Ameristar was the annual Whole Hog sponsor and host of Baconfest Kansas City to raise money for the Rehabilitation Institute of Kansas City.

Ameristar Kansas City received the "Employer of the Year Award" from the Missouri Rehabilitation Association and the Goodwill Industries "Power of Work Award" for its commitment to creating meaningful and sustainable employment for individuals with disabilities.

ARGOSY CASINO HOTEL & SPA

Argosy Casino Hotel & Spa hosted monthly dinners with the kids at Synergy Services, supported the Synergy Tree of Giving, participated in the Susan G. Komen Race for the

Missouri Casino News

Best Places to Work - Ameristar Casino Resort Spa St. Charles and River City Casino & Hotel were named among the *St. Louis Business Journal's* 2016 Best Places To Work for the third year in a row.

World Pastry Challenge - River City Casino & Hotel Executive Pastry Chef

Stephan Schubert was top winner in The World Association of Chefs Societies' 2015 Global Pastry Chef Challenge in Quito, Ecuador, representing the US in the Americas Competition. Schubert will compete for the title of World Pastry Chef in 2016.



Cure, Special Olympics Missouri and other charitable activities for more than 100 organization, chambers and city organizations.

In 2015, the annual Argosy Charity Golf Tournament raised \$53,738 for Miles of Smiles to provide comprehensive, portable dental care to needy children. Argosy donated \$30,000 to Working Families' Friend, an organization providing financial assistance to working families experiencing hardships; \$25,000 to Northland Health Care Access, an organization that coordinates quality primary health care through community collaboration and advocacy; and \$7,500 to the Riverside Fire/Police Athletic League, which works with impoverished and underprivileged children.



LUMIÈRE PLACE CASINO & HOTELS

Lumière Place Casino & Hotels outreach team built houses with Habitat For Humanity St. Louis, packaged food at the St. Louis Area Foodbank, and landscaped at Lydia's House, a transitional housing program for abused women and their children. The team served hot lunches at the St. Patrick Center Shamrock Club, cooked dinner for cancer patients and caregivers, and transformed a hotdog cart into The Polar Express, selling hot chocolate to raise funds for the St. Patrick Center.



Scholarship Has Educated Youth for 20 Years

Now in it's 20th year, the Project 21 Scholarship program has awarded more than \$130,000 in scholarships to Missouri high school seniors and educated hundreds of thousands of Missouri students about the issues and dangers of underage gambling. In Missouri, it's illegal for anyone under 21 to gamble in a casino.

Each year, the Missouri Gaming Association awards two \$1,500 scholarships and four \$1,000 scholarships through Project 21. Students create essays, posters and videos, and display or publish them in their schools to educate peers.

"I hope to inspire in students the courage to stand up against adolescent gambling."

Jacob Hobbs, a senior at Troy Buchanan High School in Troy, MO, and **Tessa Mills**, a senior at Cass Midway High School in Cleveland, MO, each won a \$1,500 scholarship. Jacob's poster "There's No Jackpot In Underage Gambling" was displayed in his sociology class and the teacher created a lesson plan around the topic. Tessa's article "The Consequences of Underage Gambling" was published on the home page of her high school website. Winners of \$1,000 scholarships included **Madelyn Elayne Jobe** of California High School; **Samira Zantout** of North Kansas City High School; **Tania Contreras** of Monett High School; and **Cameron O. Miller** of Blue Springs South High School.



MILLS

AFFINITY GAMING

Mark Twain Casino is most passionate about helping people impacted by Alzheimer's disease. Mark Twain sponsors the annual Walk to end Alzheimer's and along with St. Joseph Casino and Affinity Gaming Corporation, supports the Alzheimer's Association on an ongoing basis.

St. Jo Frontier Casino raises funds for Open Door Food Kitchen and Second Harvest.

