

### MISSISSIPPI MCHAA GAMING & HOSPITALITY ASSOCIATION

STATE OF THE INDUSTRY



### ABOUT THE MGHA

The Mississippi Gaming & Hospitality Association (MGHA or Association) was chartered in 1993 and works in cooperation with the American Gaming Association in Washington D,C. As of the date of this report, all of the commercial casinos operating in Mississippi are members of MGHA. There are 17 companies that operate 28 Mississippi casinos, and more than half of those companies also operate in other gaming jurisdictions. The Association advocates for policies that would allow Mississippi's commercial casino operators to stay strong and to support the state's \$6 billion travel and tourism industry. The goal of the Association is to ensure Mississippi's travel and gaming tourism industry remains competitive and strong, and continues to be a healthy contributor to the state's verall economy. With that in mind, MGHA has through collaboration come up with recommendations to support this goal:

- Encourage resort-style casino developments in Mississippi through tourism incentive programs. Tourism-related activities should include well-capitalized gaming resort projects and encourage other non-gaming amenities.
- >> Avoid policy that singles out gaming from the tourism industry or puts an unfair burden upon the gaming industry.
- >> Maintain Mississippi's stable gaming regulatory environment.
- >> Invest in post-secondary curricula that will provide residents with the training and education needed to have an immediate
- impact on Mississippi's \$6 billion tourism industry and make the state's workforce more competitive.
- Solution to support the state's and the industry's initiatives to combat problem gambling.

The Mississippi gaming industry began in 1992 with a single riverboat in Biloxi. It has grown into a well-capitalized economic sustainer over the past 23 years and is a vital part of the overall tourism industry. In 2014, the Mississippi Development Authority – Tourism (MDA Tourism) office reported 22.33 million out-of-state visitors, while the casinos reported 14 million out-of-state visitors in the same period. This translates into an estimated 65% of out-of-state visitors making a trip to a casino. MGHA will continue to work with its Members and Associate Members to increase the number of visitors to our state.

#### MGHA WEBSITE [WWW.MSGAMING.ORG]

MGHA has given great attention to its website during 2015 as we pursue our goal of making it a valuable resource of information relevant to our industry here in Mississippi. We are very proud of the work done on our website and we welcome your feedback. We also ask you to share any information you believe would be appropriate for posting on the site.

#### MGHA STAFF

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The State of the Industry Annual Report is a publication prepared by the Mississippi Gaming & Hospitality Association (MGHA). MGHA is a non-profit organization comprised of casino operators and other businesses that make up and support the Mississippi commercial gaming industry. For more information about MGHA or the gaming industry in Mississippi, please visit www.msgaming.org. Click the Contact Us tab if you need to reach us.



### **WELCOME LETTER**

Happy 2016! As I begin my tenure as the Chair for the MGHA, I want to thank Susan Varnes on behalf of the entire Association for her leadership over the last two years. The Association has become more unified and accomplished many great things during her service. I also want to express my gratitude to all for your support and confidence in allowing me to serve the Association. As I enter my fourth year in the Mississippi market, I am very excited for the opportunities that we have in our industry. Our industry plays a significant role in our state's economic welfare through providing jobs, taxes revenues, tourism, and community service. The three areas of the state where we have gaming each face different opportunities and challenges, and I promise to have a pointed view for each market while trying to grow the industry as a whole in our state.

As you will see in our annual report, our industry drives tens of millions of visitors to our state each year, generates hundreds of millions of dollars in tax revenue for our states, employs thousands of great folks to work at our businesses, provides vitality for the companies who we do business with here in our state, spends millions of dollars to promote our businesses and increase the quality of our facilities, and is responsible for thousands of hours being contributed to the volunteer efforts in the communities in which we work and live. We should all be proud of this.

As many positives as we have, there continue to be economic challenges facing our industry. After seeing two properties exit Mississippi in 2014, we did have one additional property leave the state this year while adding the Scarlett Pearl to the coastal market in December. Year to date through October, statewide gaming revenues have increased 1.5 percent over 2014, led by the Coast which has grown at a 6 percent pace. In fact, two of the three regions have positive year over year growth. This certainly breaks the trend of the past few years. As we move into 2016, we will still face hurdles of competing for revenues not only from other states, but also from other entertainment venues as we all battle for discretionary spending from consumers. We still find ourselves in a position of strength and a united front with all properties in the state being members of the association. Maintaining this position will remain a top priority. Together we can work to accomplish approvals and initiatives which can continue to grow the industry. We must also further strengthen the alliances we have developed with tourism to continue to attract visitation to our state. A third key to our success will be to position our businesses as vibrant places to work and visit. And finally, we must continue to be active in the communities in which we live and work.

Please enjoy this the seventh annual State of the Industry Annual Report Looking forward to a great year. All the best!

#### Lee Dillard MGHA Chair



# 2016 OFFICERS AND CURRENT BOARD MEMBERS

#### BOARD MEMBERS

R. Scott Barber Horseshoe Tunica Hotel & Casino

Toni Burns Sam's Town Casino - Tunica

Anthony Carlucci Hollywood Gulf Coast – Bay St. Louis

Keith Crosby Palace Casino Resort - Biloxi

Steve Ditchkus Fitz Casino & Hotel - Tunica

Cheryl Duhon-Bailey Resorts Casino - Tunica

Sherri Edwards Harlow's Casino Resort & Spa - Greenville

John Ferrucci Silver Slipper Casino & Hotel - Bay St. Louis

Felicia Gavin DiamondJack's Casino & Hotel - Vicksburg

Marcus Glover Beau Rivage - Biloxi

Roscoe Greene Trop Casino - Greenville

Bill Gustafson Isle of Capri Casino & Hotel - Lula

Chett Harrison Golden Nugget - Biloxi

Gerad Hardy Ameristar Casino Hotel – Vicksburg

#### OFFICERS

Lee Dillard, Chair – (North Region) Tunica Roadhouse Casino & Hotel

Paul Avery, Vice Chair – (Central Region) Lady Luck Casino - Vicksburg

Cathy Beeding Mackenzie, Treasurer – (Coast Region) Island View Casino Resort - Gulfport

Steve Lombert, Secretary – (North Region) Hollywood Casino - Tunica

Note: Officers represent the three regions within the state. Each officer is appointed for two year term (current term 2016-2018). Officers also serve as Board Member for their respective property.

Wade Howk Boomtown Casino - Biloxi

Melonie Johnson Gold Strike - Tunica

Jonathan Jones Harrah's Gulf Coast – Biloxi

Steve Lambert Hollywood Casina - Tunica

Bob Little Bally's Cosino - Tunica

Duncan McKenzie IP Casino Resort Spa - Biloxi

LuAnn Pappas Scarlet Pearl Casino & Hotel - D'Iberville

Kevin Preston Magnolia Bluffs Casino - Natchez

Todd Raziano Hard Rock Hotel & Casino - Biloxi

Ginny Tzotzolas Riverwalk Casino Hatel - Vicksburg

Susan Varnes Treasure Bay Casino & Hotel - Biloxi

Note: Each operator has a vote on MGHA matters. Each property designates a primary and secondary representative for voting purposes: MGHA communications are sent to both representatives. The primary representatives are listed above.

# HIGHLIGHTS FROM 2015

1, 2015 brought about the 10 year anniversary of Hurricane Katrina and we honored those lost, our first responders and the millions of volunteers that have helped restore the Mississippi Gulf Coast.

2. This year we honored our three outgoing MGC commissioners (John Hairston, Wallace Carter and Nolen Canon) and welcomed three new commissioners (Jerry Griffith, Alben Hopkins and Tom Gresham).

**3.** The State of Mississippi entered into a settlement with BP that will bring more than \$1.5 billion to the state over the next 17 years with \$150 million coming in 2016 and \$40 million to be paid each year from 2019 through 2033.

**4.** In 2015, we celebrated several grand openings of new projects, including the Silver Slipper that opened its 129-room hotel (including 9 suites) located in Bay St. Louis.

5. Island View Casino completed a \$60 million renovation to Beach Tower in Gulfport adding 405 rooms, restaurants, a fitness center, meeting space and a pool.

 Boyd Gaming continued capital improvements investing over \$70 million in renovations and upgrades to the IP Casino Resort Spa.

7. Boomtown cut the ribbon on a new RV Park in Biloxi.

8. Outside Mississippi, the expansion of gaming continued with Massachusetts becoming the 40th state to offer commercial gaming. Closer to home, talk of gaming expansion continued in Alabama, Florida and Georgia.

9. New non-gaming developments opened around Mississippi in 2015, including a Tanger Outlet Mall, which opened in Southaven – 20 minutes north of Tunica.

**10.** MGM Park opened on June 6, 2015 with the Biloxi Shuckers playing for a sold-out crowd to open its inaugural season of AA-minor league baseball on the Mississippi Gulf Coast.

11. MGHA forged partnerships in 2015 with MDA – Tourism (Visit Mississippi), the Mississippi Tourism Association, the Mississippi Hospitality & Restaurant Association, and the convention visitor bureaus along the coast and in the north to co-promote tourism and visitation to Mississippi.

12. We said farewell to Isle of Capri Natchez, which was one of the first riverboats to open along the Mississippi River.

13. In December 2015, the Scarlett Pearl Casino & Hotel opened its doors making it the first casino resort in the City of D'Iberville.

14. The year 2015 was a year of robust capital investment. Looking forward to 2016, there continues to be a high level of interest in investing in the vibrant Mississippi gaming-tourism market.

# MISSISSIPPI COMMERCIAL GAMING'S \$4.4 BILLION IMPACT

In 2015 (through December 31, 2015), the direct output of the Mississippi commercial gaming industry increased to \$2.875 billion, pushing the economic impact of gaming to nearly \$4.4 billion when you factor in \$0.6 billion in indirect output and \$0.9 billion in induced output.

#### SALES TAK \$173 MILLION PERSONAL INCOME TAK \$19.3 MILLION CORPORATE

\$12.6 MILLION
social security
\$5.9 MILLION
EXCISE AND FEES
\$45.4 MILLION
PROPERTY

\$98.9 MILLION

\$355.1 MILLION STATE & LOCAL TAX REVENUES PERSONAL INCOME TAK \$64.1 MILLION FEDERAL CORPORATE \$59.4 MILLION INDIRECT BUSINESS \$36.7 MILLION SOCIAL SECURITY \$175.2 MILLION

### \$335.4 MILLION

FEDERAL TAX REVENUES

#### GAMING TAKES PAID TO GENERAL FUND \$133.4 MILLION

GAMING TAKES PAID TO BOND SINKING FUND \$36 MILLION

GAMING TAKES PAID TO LOCAL GAMING JURISDICTIONS \$84.7 MILLION

### **\$254.1 MILLION**

STATE GAMING TAX REVENUES

# \$945 MILLION

TOTAL GAMING RELATED TAX REVENUES 2015

# **\$85 MILLION LOCAL IMPACT**

40% | \$33.8 MILLION S33.8 MILLION TO CITY/COUNTY GENERAL FUND 20% | \$16.94 MILLION CITY PUBLIC SAFETY 00% | \$8.47 MILLION COUNTY PUBLIC SAFETY 10% | \$8.47 MILLION COUNTY PUBLIC SAFETY 00% | \$16.94 MILLION CITY SCHOOLS 00% | \$16.94 MILLION COUNTY SCHOOLS

\$34 MILLION GOES TO CITY/COUNTY GENERAL FUND | \$51 MILLION GOES TO PUBLIC SAFETY AND EDUCATION

### 2015 TOTAL REVENUE AND GAMING REVENUE

Mississippi operators realized \$2.875 billion in total revenue (an increase of \$15.2 million)

- Mississippi casinos realized \$2.17 billion in gaming revenue (an increase of \$47 million).
- Casinos generated \$758 million in non-gaming revenues.
- On a statewide basis, gaming operators reported an increase in gaming revenues of 1.5%.
- Sulf Coast operators produced \$1.154 billion in gaming revenue; River County operators produced \$963.5 million in gaming revenue.

\$1,800,000
\$1,600,000
\$1,400,000
\$1,200,000
\$1,000,000
\$800,000
\$600,000
\$400,000
\$200,000
\$0

RIVER COUNTIES

GULF

# 

### **OBSERUATIONS FROM 2015**

As noted above, gaming operators generated close to \$2.9 billion in total revenue. Non-gaming revenue accounted for 26% of the total revenue (which comes from non-gaming amenities such as restaurants, hotel, spa, golf, ball games and other entertainment venues).

- Regionally the ratio of gaming versus non-gaming revenues broke down as follows: Gulf Coast 70/30; Central 80/20; North 75/25.
- >> More than 2/3 of casino visitors also visit other attractions.
- With support from the Mississippi Legislature, operators obtained funding to develop non-gaming amenities:
- The City of Gulfport received an appropriation from the state legislature of \$12.5 million to support the building of an aquarium.

The City of Vicksburg received \$18 million to be utilized by the Department of Transportation to construct a bridge extending the I 20 South Frontage Road, running parallel to Old Highway 27, over the railroad in Vicksburg, Mississippi. In addition, the Legislature appropriated \$500,000 to the Vicksburg Interpretive Center, Catfish Row Construction Fund. This is funded through a monthly diversion of gaming revenue from the Bond Sinking Fund for one calendar year.

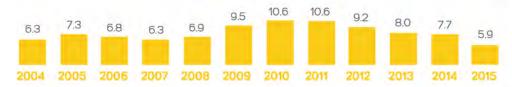
The Legislature appropriated \$1 million for the City of Greenville to assist in the renovation and refurbishment of the E.E. Bass Cultural Arts Center. This too is funded through a monthly diversion of gaming revenue from the Bond Sinking. Fund for one calendar year.

With many Mississippi gaming operators also operating in Louisiana there is a natural cross-marketing among properties in both states. Together, Mississippi and Louisiana continue to stand as the second largest gaming market in the country second only to Las Vegas, Nevada.

### CASINO OPERATORS PROUIDE MORE THAN 18,000 DIRECT JOBS

#### GAMING PROVIDES \$1.5 BILLION IN TOTAL LABOR INCOME

Mississippi unemployment fell to 5.9% as of October 2015 compared to 7.7% at the end of 2014.



>> The average unemployment rate in gaming counties is 7.3% with Harrison County having the lowest unemployment rate at 5.7% and Washington County having the highest rate among gaming counties at 9.3%.

- >> Without the gaming industry, Mississippi's unemployment would be 11.7%.
- >> Gaming supports 18,000 direct jobs and 37,000 total jobs in Mississippi.
- >> Women make up nearly one-half of gaming's workforce.
- >> Gaming provides 200+ unique coreer paths, including high tech jobs.
- >> More than 33% of the gaming workforce is younger than 30 years of age, compared to the national average of 25%.

### EMPLOYEES GIVE BACK TO COMMUNITY

Each year casinos make cash contributions in excess of a million dollars as well as non-cash contributions, while employees donate countless hours to provide support to local charities and civic organizations. Throughout the year, casino operators sponsor numerous charitable events with employees seen wearing their company's logo while serving their communities. They serve meals at local food missions, work their community pantries, call bingo games at senior citizens centers, build houses with Habitat for Humanity, collect toys for Salvation Army programs and raise money for United Way and other organizations through charity walks, car washes and bake sales. They also donate blood, record books on tapes for hospitalized children, plant gardens and help clean at nonprofit centers and pet and care for unwanted and abused animals. This work is completed with the support of casino management, which encourages the mission of being good corporate citizens and giving back to the community. In June, our Executive Director got in the game raising over \$1,000 for the chance to go "Over the Edge" to benefit Habitat for Humanity.



### CASINO OPERATORS PAY MORE THAN TAXES

Each year casinos make additional payments to the state in addition to paying taxes. For example, in 2015, operators along the Gulf Coast paid tidelands lease payments of \$7.225 million. This amounts to almost 75% of the total \$9.787 million collected by the Mississippi Secretary of State. In addition, along the river, operators paid levee fees in the range of \$3 - \$4 million. These funds are used to maintain piers, bulkheads and shorelines along the coast and to keep our levees in good condition to protect residents from floods.







### 2015 UISITATION TRENDS TO MISSISSIPPI CASINOS

	State YOY Снапсе	2015 Uisitation	2014 Uisitation	2013 Visitation	2011 Visitation
ALABAMA	(5.3%)	2,696,246	2,845,187	2,850,661	2,971,060
ARKANSAS	(2%)	1,100,511	1,123,914	1,275,397	1,821,492
FLORIDA	(9.6%)	2,135,520	2,361,602	2,329,493	2,504,034
GEORGIA	(7.5%)	954,636	1,032,624	1,064,334	1,364,007
ILLINOIS	(5.8%)	230,708	245,035	278,566	402,739
INDIANA	(10%)	103,149	114,476	124,693	178,729
LOUISIANA	(3.3%)	3,155,081	3,260,595	3,237,043	4,253,554
MISSOURI	+8%	260,946	240,215	265,141	434,774
NORTH CAROLINA	(11.6%)	99,477	112,536	119.968	156,134
Оню	(12.7%)	97,311	111,458	126,627	179,216
OKLAHOMA	(8%)	50,433	54,845	63,960	101,859
TENNESSEE	(17%)	1,514,734	1,825,485	2,108,882	3,276,207
TEXAS	(15%)	496,512	583,685	584,448	681,415
OTHER	(9.6%)	1,038,939	1,149,437	1,380,787	2,001,784
OUT OF STATE TOTALS	(7.3%)	13,964,806	15,061,094	15,810,000	20,325,899
MISSISSIPPI TOTALS Totals	(6.3%) (6.9%) Year / Year	8,167,753 22,132,559	8,721,042 23,782,136	8,966,610 24,776,610	8,504,284 28,830,183

#### **OBSERUATIONS:**

The Mississippi Development Authority Tourism office (MDA Tourism) reported that more than 22 million visitors traveled to Mississippi in 2014, generating approximately \$6.09 billion in purchases. This year, MDA Tourism projects that, in 2015, Mississippi attracted 22.33 million visitors with an estimated spend of \$6.165 billion, an increase in both areas.

>> Gaming operators saw a slight decrease in visitation along the Gulf Coast, a slight increase in the Central River region and another decrease in the North River region market.

Along the Gulf Coast, 10 million out-of-state travelers visited the coastal Mississippi casinos. Overall, the market experienced a 4% decline in visitation, including slight declines in visitors from Alabama, Louisiana, Florida, Georgia and Texas; however, with the opening season at MGM Park and a record year with Cruisin' the Coast, operators realized an increase in revenues of 6.5%.

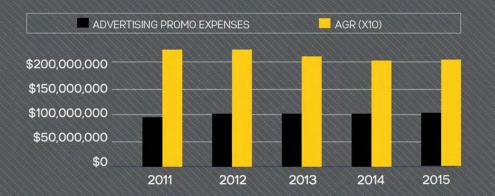
>> In the Central River region, out-of-state visitation from Arkansas increased by more than 50,000 visitors (an increase of 31%) while out-of-state visitation from Lauisiana and Texas decreased slightly. Overall, visitation to the casinos in the Central River region increased 6.75% in 2015. This translated into a 2% increase in gaming revenue in the Central River region. These positive numbers were welcomed good news amongst operators in this region.

>> In the North River region, out-of-state visitation continued to decline from 4.45 million visits to 3.83 million visits, a decline of 14%. This translated into a 5.5% decline in gaming revenue. The good news in Tunica is that the problem has been identified, that is, we know this market has lost 42% of its visitors from Arkansas and Tennessee since the Mississippi River flooded in May 2011 to regional competition in West Memphis, Arkansas. The solution is to build attractions near and around the Tunica casinos to bring back those visitors (and more) to Mississippi.



### GAMING'S IMPACT ON MISSISSIPPI

\$2.42 BILLION IN OPERATING EXPENDITURES, INCLUDING \$900 MILLION IN LABOR AND \$101 MILLION SPENT ON MARKETING AND PROMOTIONS



Since 2012, casino operators have reported spending more than \$100 million on advertising and promotions to drive visitors to Mississippi. This trend continued in 2015 with operators reporting \$101 million spent on advertising and promotions. In 2015, operators also reported nearly \$700 million in labor expenditures and total operating expenditures of \$2.42 billion. When one considers the billions of dollars invested in high quality resorts that exist throughout Mississippi, the nearly \$1 billion the industry generates in taxes, the thousands of people it employs and the competitive wages and excellent benefits it offers, there is no doubt gaming has been and continues to be very good for Mississippi.



Marcus Glover, recently appointed General Manager at Beau Rivage in Biloxi, commented on the industry and the importance of partnership, "The gaming industry has had a significant positive impact on the Mississippi economy. Last year, operators generated nearly \$1 billion in federal, state and local tax revenues, and spent millions more on capital projects, charitable giving and advertising and promotions to bring visitors to the state. Given rising operational costs and increased competition in neighboring states, the Mississippi gaming industry's continued success depends on strong partnerships with key stakeholders and policymakers. Having a stable operating environment affords casino operators to continue to reinvest capital, employ thousands of Mississippi residents, and serve as an anchor for driving visitation to Mississippi."



### GAMING'S IMPACT ON THE TOURISM INDUSTRY



In 2013, Governor Bryant discussed the importance of tourism, noting that the travel and tourism industry is the 4th largest industry in the state. While MDA Tourism reported an increase in visitation to Mississippi in 2014 (22 million visitors up from 21.6 million), MDA Tourism also reported a reduction in visitor spend in 2014 (\$6.09 billion down from \$6.2 billion). However, Daron Wilson, Interim Director of Visit Mississippi, is optimistic about 2015 numbers. He stated, **"While the numbers are preliminary, in 2015, we estimate there were 22.33 million visitors to Mississippi with an estimated spend of \$6.165 billion showing a year over year increase in both categories."** He added, **"Forming cooperative partnerships with organizations such as the Mississippi Gaming and Hospitality Association fosters continued growth in both visitation and visitor spend. We look forward to continuing our work with MGHA in 2016 and beyond."** 

In 2015, **MDA Tourism sought from the Mississippi Legislature an allocation of an additional \$5.1 million for marketing the state's tourism amenities** bringing the marketing budget to \$8.1 million. This appropriation was not approved in 2015, but is expected to be pursued again in the upcoming 2016 legislative session.



In spite of funding challenges, in 2015, MGHA and MDA tourism office worked collaboratively to promote "Visit Mississippi" through several strategic efforts. The common goal of MDA and MGHA, as well as the various tourism and hospitality associations across the state, such as, the Mississippi Tourism Association and the Mississippi Hospitality & Restaurant Association, is to promote Mississippi as a tourism destination and to increase out-of-state visitation to Mississippi. All recognize the importance of monitoring total visitor spend as well.

Given the \$47 million in additional gaming revenue realized in 2015 and the overall increase in visitor spend of \$75 million as projected by MDA, it is clear that gaming is having a positive impact on the overall tourism and travel industry.



### LETTER FROM EXECUTIVE DIRECTOR

2015 was a very successful year for the Mississippi gaming industry and for our association.

The 2016 Annual Report paints a comprehensive picture of our complex gaming market. The overarching thread that runs through these numbers is that of the importance of a broad tourism plan. Undoubtedly, our visitors are tourists, whether they are traveling 50 miles or 500 miles. The Mississippi Gaming Commission reports that more than 15 million visitors to our casinos come from out of state, comprising more than two-thirds or our total visitation.

Economic challenges have put pressure on our markets, and we have witnessed a fury of natural disasters and catastrophes, specifically in the form of hurricanes, oil spills, and floods. Our numbers have not been immune to these challenges, and we have witnessed a decline from \$2.9 billion dollars in gross gaming to approximately \$2.1 billion.

While this news can be disconcerting, it is important to remember to the fundamentals. Our visitors are tourists, and we have to approach our relationship with our visitors in that vein. In other words, we need to look at what we are doing to attract them, what will interest them while they are here, and what we can do to keep them longer. We have to increase the scope of the visitor's experience. This is where cross-promotion and regional strategies become a prime component of this venture. And this is exactly why Mississippi has linked arms with Louisiana in cross-promoting our state tourism products. When combined, the Mississippi and Louisiana gaming markets make up the 2nd largest gaming market in the country. We must capitalize on this and continue to build on our products.

As always, gaming tax revenue pumps back a large amount into the local and state level coffers. This income has been used for housing, education, transportation, health care services, and public safety programs. The most significant impact is the number of jobs our industry provides.

Though we have had challenges, we are looking forward to a healthy and robust year. We have always been a state with a premier gaming product, and we will continue to be so. We will continue to strive for low tax rates and a fair, but strict, regulatory environment.

I would like to thank everyone who has played a part in our continued success. Whether you are a member, associate member, vendor, or patron, thank you for making this year a successful one and for building on the strength of this industry.

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In Partnership,

LARRY GREGORY MGHA Executive Director

### MGHA'S SOUTHERN GAMING SUMMIT:

#### MS AND LA RANK AS SECOND LARGEST GAMING MARKET IN THE UNITED STATES

MGHA's Southern Gaming Summit: MS and LA Rank as 2nd Largest Gaming Market in the United States

The focus of MGHA's Southern Gaming Summit in 2015 was regionalism and forming new partnerships to drive more visitors to Mississippi. As reflected in the numbers, Mississippi and Louisiana combine to be the 2nd largest gaming market in the United States.

#### OBSERUATIONS

>> Louisiana reported 28.7 million total visitors in 2014 compared to 22 million visitors to Mississippi, which equates to over 50 million visitors; more than the Las Vegas Strip.

>> Together the states reported \$17.29 billion in total visitor spend in 2014. Casinos generated gaming revenue of \$4.54 billion (just over 25% of the total visitor spend).

>> Casinos also generated another \$1.8 billion in non-gaming revenue (about 30% over an above gaming revenues) for a total of \$7.35 billion or about 42% of the total visitor spend reported in 2014.

>> Notably, while Louisiana had only 25% more visitors than Mississippi it realized 45% more spend than Mississippi, highlighting the economic benefit of having both gaming and non-gaming attractions and the importance of having high quality transportation available to bring in high value visitors.



The Survey results from 2015 Southern Gaming Summit are in. Some highlights from the survey include:

- 2,819 registrations with 77% coming from MS, LA, NV, CO, AL and TX
- 62% attended SGS in the past with 38% in new attendees
- Nearly all attendees (92%) reported they will return, are likely to return or may return.
- Nearly all speakers (93%) are likely to recommend SGS to co-workers
- The Key Note Speaker received very high ratings as did many of the sessions, including the Opening Night Reception, the Chef's Event, and the Executive Roundtable to name just a few.



To register or learn more, go to www.sgsummit.com

# MS/LA OPERATE



WINC 55,634 DDD SLOTS



### 1,521 TABLES



IN GAMING REVENUE (NET OF VIDEO POKER IN LA)



### MGHA: DEUELOPING NEW PARTNERSHIPS; GAMING ONE OF FIVE DRIVERS OF VISITATION

As Mississippi faces more competition from operators in Alabama, Arkansas, Louisiana, and possibly Florida and Georgia, it is vital that Mississippi have a plan for promoting more visitors to our state. Gaming is only one driver of visitation as visitors are looking for more than just casinos. This was the subject of a roundtable discussion at the Southern Gaming Summit held May 3-5, 2015. MGHA Deputy Director, Michael Bruffey, moderated the discussion with former MGC Chairman, John Hairston, along with several other tourism experts from Mississippi and Louisiana (Renee Areng, Rick Taylor, Webster Franklin and Misty Shaw). The panel considered the overall visitor counts and visitor spend in both Mississippi and Louisiana and compared those numbers with the counts reported by casinos in both states. Ultimately, the group focused its discussion on the Five Drivers of Visitation: Gaming, Non-Gaming Amenities, Special Events, Marketing and Access (road and air), noting each of these will have a positive or negative impact on visitation trends depending upon the quality of each driver in a market. This message was shared with various business groups into the summer months.



Throughout 2015, MGHA shared its message about the Five Drivers of Visitation, but MGHA also took action and worked in forging partnerships with the team at the state and local level to develop ideas to increase visitation to Mississippi. Some examples of what resulted from these efforts include:

A Joint Marketing Effort with MDA Tourism will feature Visit Mississippi appearing on advertising and marketing materials that the casino operators send to their customers. For no additional cost to MDA or the state, the Visit Mississippi logo will be shared with millions of potential visitors. Through regional CVBs, several ideas were developed for Special Events, including the creation of the Mississippi Coast Marathon.

Through collaboration and partnership, this event will take place along the scenic coastline and is tentatively scheduled for the weekend of December 2-4, 2016. MGHA has met with the CVB in Tunica and is supporting the development of Non-Gaming Amenities that will bring backmany of the visitors that we lost after the Mississippi River flood in 2011.

In terms of Access, MGHA has participated in several meetings during 2015 to learn more about the significant decline in enplanements at regional airports around the country, including those in Mississippi. The declines occurred following the merger of larger air carriers that began in 2008 leaving just four major air carriers (American, Delta, United and Southwest) operating today. Notably, these carriers control 83% of the air service in the United States with a few smaller air carriers (referred to as low cost air carriers) handling the remaining 17% of the service. These low cost carriers are in high demand by regional airports. If we can secure Low Cost Air Service at Mississippi regional airports, it will have an immediate positive impact, bringing visitors to Mississippi that stay longer and spend more.

### **HISTORIC EUENTS IN 2015**

#### 10 YEAR ANNIVERSARY OF HURRICANE KATRINA

During August 2015, the gaming industry remembered the 10 Year Anniversary of Hurricane Katrina with dignitaries coming to the Gulf Coast from around the state and the country to remember those events and to pay their respects to those who lost their lives and the first responders and volunteers that helped the region recover. MGHA members and staff attended many of these events.



#### GOUERNOR APPOINTS THREE NEW COMMISSIONERS TO THE MGC

In 2015, for the first time since the inception of gaming in Mississippi, the governor appointed three new commissioners to the Mississippi Gaming Commission in one year. In 2014, our industry welcomed Wallace Carter as we said farewell to Jerry St. Pe'. This year we said farewell to John Hairston and Nolen Canon, who completed their service with the commission, but we also had to say farewell to Mr. Carter as he stepped down in order to pursue a new business interest. St. Pe', Hairston and Canon all served as commissioners when Hurricane Katrina struck in 2005. As we gathered to recognize the retirement of these individuals, we honored and paid tribute to them for their invaluable service in leading our industry out of this most challenging era. Looking back we honored these commissioners for the countless hours of service they gave to help our state recover following Hurricane Katrina, followed by the 2008 Great Recession, the 2010 BP Oil Spill and the Mississippi River flood of 2011.





As we said farewell to these fine gentlemen, we had the privilege of welcoming three equally fine gentlemen in Jerry Griffith, Alben Hopkins and Thomas Gresham.

### 2015 BRINGS NEW GAMING DEVELOPMENT: MGC Rule 1.5

#### Focusing on Amenities to Increase disitation

In 2011, the Tunica Convention and Visitors Bureau commissioned a study of the Tunica market with Price Waterhouse and Coopers (PWC). Ever since, local and state officials have been focused on adding more non-gaming amenities to attract visitors to Mississippi, including visitors to Mississippi gaming markets. The PWC report is available on MGHA's website (www.msgaming.org) under Studies & Analysis. With this in mind the Mississippi Gaming Commission took action in 2013 and adopted Rule 1.5 (effective January 1, 2014).

Rule 1.5 requires developers of new casino projects to include an amenity that will increase tourism to the area and/or to demonstrate how the project will otherwise grow the market. In 2014, at the MGC hearing when Scarlet Pearl applied for approval to proceed with its development, then MGC Chairman, John Hairston commented on Rule 1.5. He reiterated the MGC's commitment to join the effort to bring more non-gaming amenities to Mississippi.







Scarlet Pearl added to its plan a \$2 million world championship miniature golf course. The project became a reality on December 9, 2015, when the Scarlet Pearl opened its doors in D'Iberville.

Rule 1.5, which went into effect January 1, 2014, required Scarlet Pearl to add an amenity intended to attract new visitors to the area. This was the genesis behind the Lava Links Golf Club.

The thinking behind Rule 1.5 is that with more non-gaming amenities, the casinos offer visitors a resort experience rather than just a gaming experience. Mississippi is very unique in this regard.

Outside of Las Vegas and Atlantic City, you will not find a cluster of high-end gaming resorts like you do in Mississippi. When you couple the high end resorts with the coastal experience, the history of cities along the Mississippi River, the history of Blues in the Delta, our beautiful weather and southern hospitality, Mississippi provides a very attractive and unique travel experience to tourists. With nongaming revenue accounting for more than half of the total revenue in Las Vegas, there is tremendous potential for growth and development of non-gaming revenue in Mississippi.

When one considers that in 2015 the Mississippi casino-resorts generated \$2.875 billion, of which \$2.117 billion represented gaming revenue and \$758 million represented non-gaming revenue, if we aim to reach the point where non-gaming exceeds gaming revenue, we will have to see an increase of \$1.5 billion in this area. The BP Oil Settlement presents a "golden opportunity" for Mississippi to achieve this goal so that Mississippi can set itself apart as a premier tourism destination market.

# THE BP OIL SETTLEMENT: A GOLDEN OPPORTUNITY

On April 20, 2010, the Deepwater Horizon Macondo oil well drilling platform exploded killing 11 men, including four Mississippians and spewing millions of gallons of oil into the Gulf of Mexico, reportedly the largest oil spill in the history of the United Coast were closed for months. Visitors stayed away and buyers of our seafood cancelled orders for fear the seafood was contaminated. On July 2, 2015, Gov. Phil Bryant and Attorney General Jim Hood announced that Mississippi reached an agreement with BP to settle claims related to the 2010 Deepwater Horizon disaster. The settlement will bring approximately \$1.5 billion in additional relief to Mississippi over the next 17 years. Combined with \$659 billion in early funding, Mississippi is receiving a total of nearly \$2.2 billion in compensation.





#### BREAKDOWN OF \$1.5 BILLION:

#### \$183 MILLION

in Natural Resource Damage Assessment payments to be paid over 15 years, which will be used primarily for environmental restoration;

#### \$582 million

in Clean Water Act penalties under the RESTORE Act to be paid over 15 years and used primarily for environmental projects, research and economic development.

#### \$750 MILLION

in economic damages paid over 17 years to be paid with \$150 million in 2016 and equal yearly payments of \$40 million from 2019-2033. The funds will be available for appropriation by the Mississippi Legislature.

#### BREAKDOWN OF \$659 MILLION:

\$112.557 MILLION In Natural Resource Damage Assessment Early Restoration payments:

#### \$106 million

in early RESTORE Act payments;

#### \$356 million

in National Fish and Wildlife Foundation payments;

#### \$85,168

in initial response payments.

In MGHA's annual report, State of the Industry 2014, several projects generated from the Gulf Coast Restoration Trust Fund were highlighted. In MGHA report, State of the Industry 2015, it was noted that these projects (like the stadium in Biloxi) would become possible once the settlement with BP was reached.

With the BP settlement complete and Mississippi to receive \$150 million in 2016. Mississippi now has the funding to restore its coastline and add amenities that will bring additional visitors and create economic redevelopment to the areas impacted by the spill. With the competitive challenges facing our state in regional competition, the timing of this settlement could not be better for Mississippi.



Two examples of markets in the United States that have been dramatically impacted by regional gaming competition are the Atlantic City (AC), New Jersey and the Tunica, Mississippi markets. With all of the challenges a market can experience from the weather, an oil spill and floods it is regional competition that is most difficult to overcome.

Following Hurricane Sandy and the expansion of gaming in Pennsylvania and New Yark, the AC market experienced a 43% decline in revenue. Following the Mississippi River floods in 2011 and the expansion of Southland Park in West Memphis, Arkansas, the Tunica market experienced a 42% decline in visits. With these scenarios in mind, we examine closely gaming developments in those states where many of our customers originate.

Alabama: About 12% of visitors to Mississippi came from Alabama in 2015, with the Gulf Coast receiving about 17% of its business from Alabama visitors and the northern region receiving about 5.5% of its business from Alabama. Overall visitation from Alabama declined slightly from 2.85 million to 2.7 million. These declines are likely attributed to the Poarch Band of Creek Indian Tribe (Poarch Creek Tribe) opening a property with electronic "binga" games in

Wetumpka, Alabama near Montgomery, and the renovations to its Atmore facility, including substantial renovations in 2015.

Arkansas & Tennessee: Approximately 12% of the visitors from out-of-state travel from Arkansas and Tennessee, with 53% of out-of-state business in the northern region coming from lhese two states. In spite of these declines, as reported, the North River region generates nearly \$1 billion in revenue and reported over \$200 million in payroll during 2015. Notably, the two casinos in Arkansas - Southland Park and Oaklawn Racing - have thrived since the flooding of 2011. In 2016, MGHA is supporting local and state officials seeking funding from the Legislature to support an attraction in this area to help bring more out-of-state visitors back to this region.

Louisiana: In 2015, Louisiana accounted for 14% of out-of-state visits to Mississippi casinos representing the largest percentage of visits from outside Mississippi. This is no real surprise since nine of the 18 companies operating the 28 casinos in Mississippi also operate in Louisiana. With the cross marketing between properties, the strong visitation is expected to continue. On a regional basis, in 2015, Louisiana accounted for 17.6% of the visits to the Mississippi Gulf Coast and 11.2% of the visits to the casinos in the Central River region of Mississippi. In December 2014, the big news coming out of Louisiana was the opening of the \$700 million Golden Nugget Casino in Lake Charles. The Golden Nugget property has played a large part in the estimated 10% year over year increase Louisiana experienced in gaming revenue during 2015, and Golden Nugget announced plans to add another 300 hotel rooms by the end of 2016.

**Florida:** Mississippi casinos attracted more than 2.135 million visits from Florida tourists in 2015, which represented a slight decline from 2014 when we saw 2.36 million visits. Approximately 10% of the visitors to Mississippi come from Florida, and Floridians account for almost 15% of the visitors to the Mississippi Gulf Coast market. Primarily visitors come from the panhandle areas such as Pensacola, Destin and Panama City. Florida's existing 13 racinos and tribal casinos located in the middle and southern part of the state likely already generate more than \$2.4 billion per year; however, they do not directly compete with the Mississippi Gulf Coast market. In 2015, the governor reached a new compact with the Seminole tribe, but it must be approved by the state Legislature. Also, an important case is pending before the Florida Supreme Court to decide whether a Gadsden County racetrack should be allowed to have slot machines without the express permission of the Legislature. The ruling will likely affect gambling operations in Gadsden and at least five other counties – Brevard, Hamilton, Lee, Palm Beach and Washington – where voter have also approved referendums authorizing slots at local parimutuels.

**Georgia:** Almost one million visits came from tourists traveling from Georgia to Mississippi casinos in 2015 representing 4.3% of the visitors to Mississippi. Regionally, the tourists from Georgia accounted for 6% of the visit to Gulf Coast casinos and about 2% of the visits to the North River region casinos. These numbers have held steady in spite of the developments in Alabama, which are highlighted above. In 2016, the state Legislature in Georgia is expected to consider whether to authorize a limited number of commercial casino licenses in the state.

**Indian Gaming:** In 2016, it is expected that Mississippi commercial casinos will likely face more regional competition from Indian gaming in Alabama and Florida. On a national level, a report demonstrates that revenue from Indian gaming continues to grow.

### THE IMPORTANCE OF NON-GAMING AMENITIES

When we read or talk about casino revenue, we typically are referring to gaming revenue. However, casinos also earn significant non-gaming revenue generated through amenities. In 2015, the non-gaming revenues for Mississippi casinos reached \$758 million. Those revenues were derived from restaurants, shows, hotel rooms, spa services, golf and other non-gaming amenities. A few examples of non-gaming amenities added by casino operators in 2015 include the following:

SCARLET PEARL OPENED A 300 ROOM HOTEL (INCLUDING 56 SUITES), FOUR RESTAURANTS, AN ENTERTAINMENT VENUE, A POOL, A FITNESS CENTER, AND THE LAUA LINKS GOLF CLUB.

ISLAND UIEW OPENED ITS HOTEL TOWER SOUTH OF HIGHWAY 90 WITH 405 HOTEL ROOMS, TWO NEW RESTAURANTS, A SPA AND HEALTH CLUB, A POOL AND EXTENSIVE CONVENTION SPACE.

SILVER SLIPPER OPENED ITS 129 ROOM HOTEL, INCLUDING 9 SUITES.

BEAU RIVAGE, THE STATE AND THE CITY OF BILOXI CAME TOGETHER TO DEUELOP A 6,000 SEAT BALLPARK THAT SERUES AS HOME FIELD TO A AA-MINOR LEAGUE BASEBALL TEAM AND SERVES AS AN ENTERTAINMENT VENUE.

#### BOOMTOWN OPENED AN RU PARK.

AMENITIES: 50 Full Hookups; 30 & 50 Amp at each Site ; Concrete Level Pads; Cable TV & WIFI; 24-hour security; Marquee Rewards discounts; Water view; On-site shuttle service











### 2016 MGHA GOALS AND OBJECTIVES

>> Incentivizing investment in non-gaming amenities is critical for Mississippi's future and will have an immediate positive impact on job creation and additional tax revenues to the state.

>> Build Mississippi into a premier tourism destination market using all available tools, including the BP Oil Settlement.

<sup>22</sup> Seek funding for Non-Gaming Amenities to pull back the visitors to Mississippi that we lost after the floods in May 2011.



In late 2015, Tanger Outlet Mall opened a 310,000 square-foot outlet center in Southaven, Mississippi, about 20 minutes north of Tunica. **"The outlet mall has drawn a tremendous number of visitors from Tennessee,"** said Webster Franklin, president and CEO of the Tunica Visitor & Convention Bureau. **"This demonstrates that Tunica Is one project away from recapturing a large portion of the Arkansas and Tennessee visitors lost over the past few years."** 



Franklin, along with several of the operators in the Tunica market, are vying for state funding to help bring a new non-gaming amenity closer to the cluster of gaming operators in Tunica.



Lee Dillard, Asst. General Manager and Vice President of Finance for Caesar's Entertainment commented, "Given the billions of dollars invested by casino operators in the Tunica market, the nearly \$1 billion in total revenue generated by this market in 2015, along with the thousands of jobs at stake, we hope the Mississippi Legislature will support a public-private project in 2016 that will help us recapture the out-of-state visitors we have lost."

>> Secure Low Cost Air Service at Mississippi regional airports. Low cost air service will have an immediate positive impact, bringing visitors to Mississippi that stay longer and spend more.

Clay Williams, Executive Director of the Gulfport-Biloxi International Airport, noted the importance and value of fly-in customers saying, "Nearly 95% of all tourists that visit the Mississippi Gulf Coast arrive by car. Currently, only 5% are arriving by air. However, those that arrive by air spend longer periods of time in our market and have a higher average spend. A recent air service study that was conducted by Ailevon Pacific Air Service Consulting shows that fly-in visitors stay at least three nights in the market and spend an average of \$717 per trip while they are here. The drive-in visitor is estimated to be spending \$478 per trip."



### BY THE NUMBERS: NORTH RIVER MARKET

2015 MARKET STATISTICS AND HIGHLIGHTS

GROSS REVENUES: \$850,186,252 (2015) v. \$936,702,777 (2014) STATEWIDE GROSS REVENUES: \$2,875,257,842 (2015) v. \$2,860,065,005 (2014)

#### AGR: \$649,651,947 (2015) v. \$687,683,015 (2014)

Slots: 8,952 (2015) v. 9,221 (2014) Casinos: 9 (same) Table Games/Poker: 299 (2015) v. 372 (2014) Hotel Rooms: 4,323 (2015) v. 4,451 (2014) Poker Games: 32 (2015) v. 53 (2014) Occupancy: 70.03% (2015) v. 72.65% (2014) Direct Employees: 5,446 (2015) v. 5,663 (2014) ADR: \$54.14 (2015) v. \$53.56 (2014) Visitation: 3.83 (2015) v. 4.45 million (2014)



#### Bally's - Tunica Slots: 949

Slots: 949 Tables: 16 Hotel Rooms: (hotel closed for renovation; to re-open with 100 Suites)

#### Fitz Casino & Hotel - Tunica

Slots: 987 Tables: 20 Hotel Rooms: 506

#### Gold Strike - Tunica

Slots: 1,256 Tables: 61 Hotel Rooms: 1,133

**Hollywood Casino - Tunica** Slots: 1,084 Tables: 21+6 poker Hotel Rooms: 494

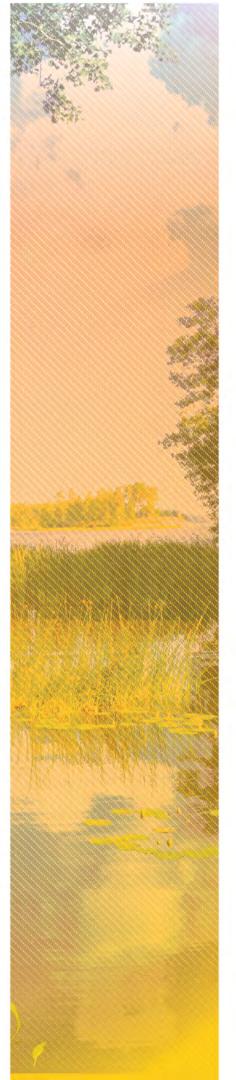
Horseshoe Tunica Hotel & Casino Slots: 1,126 Tables: 75+24 poker Hotel Rooms: 507

#### Isle of Capri - Lula Slots: 917 Tables: 20 Hotel Rooms: 410 • 28 RV

**Resorts - Tunica** Slots: 799 Tables: 9 Hotel Rooms: 201

**Sam's Town Tunica** Slots: 990 Tables: 20 Hotel Rooms: 700

**Tunica Roadhouse Casino & Hotel** Slots: 698 Tables: 24 Hotel Rooms: 135



### BY THE NUMBERS:

CENTRAL RIVER MARKET

2015 MARKET STATISTICS AND HIGHLIGHTS

GROSS REVENUES: \$390,581,194 (2015) v. \$387,463,682 (2014) STATEWIDE GROSS REVENUES: \$2,875,257,842 (2015) v. \$2,860,065,005 (2014)

#### AGR: \$313,894,239 (2015) v. \$307,866,406 (2014)

Slots: 5,982 (2015) v. 5,637 (2014) Casinos: 7 (2015) v. 8 (2014) Table Games/Poker: 121 (2015) 114 (2014) Hotel Rooms: 716 (2015) v. 709 (2014) Occupancy: 65.43% (2015) v. 71.37% (2014) Direct Employees: 2,681 (2015) v. 2,956 (2014) ADR: \$71.13 (2015) v. \$68.81 (2014) Visitation: 3.18 million (2015) v. 2.97 million (2014)



Ameristar Casino — Vicksburg Slots: 1,516 Tables: 30+10 poker Hotel Rooms: 149

**DiamondJack's Casino & Hotel – Vicksburg** Slots: 625 Tables: 13 Hotel Rooms: 122

Isle of Capri Casino & Hotel — Natchez

(closed October 2015) Slots: n/a Tables: n/a Hotel Rooms: n/a

Harlow's Casino Resort & Spa — Greenville Slots: 742 Tables: 15 Hotel Rooms: 105

Lady Luck Hotel Casino — Vicksburg Slots: 605 Tables: 8 Hotel Rooms: 89

**Magnolia Bluffs Casino — Natchez** Slots: 469 Tables: 15 Hotel Rooms: 0 **Riverwalk Casino Hotel — Vicksburg** Slots: 679 Tables: 15 Hotel Rooms: 80

**Trop Casino - Greenville** Slots: 614 Tables: 11 Hotel Rooms: 40



## BY THE NUMBERS:

GULF COAST MARKET

2015 MARKET STATISTICS AND HIGHLIGHTS

GROSS REVENUES: \$1,634,490,396 (2015) v. \$1,535,898,546 (2014) STATEWIDE GROSS REVENUES: \$2,875,257,842 (2015) v. \$2,860,065,005 (2014)

#### AGR: \$1,153,848,294 (2015) v. \$1,078,635,757 (2014)

Slots: 14,876 (2015) v. 14,574 (2014) Casinos: 12 (2015) v. 11 (2014) Table Games/Poker: 528 (2015) v. 501 (2014) Hotel Rooms: 6,625 (2015) v. 5,808 (2014) Occupancy: 92.41% (2015) v. 93.71% (2014) Direct Employees: 8,959 (2015) v. 8,752 (2014) ADR: \$75.39 (2015) v. \$74.07 (2014) Visitation: 13.07 million (2015) v. 14.04 million (2014)



**Beau Rivage - Biloxi** Slots: 1,816 Tables: 82+16 poker Hotel Rooms: 1,740

**Boomtown Casino - Biloxi** Slots: 957 Tables: 16 Hotel Rooms: 0

#### **Golden Nugget - Biloxi** Slots: 1,195 Tables: 53 + 9 poker Hotel Rooms: 705

Hard Rock Hotel & Casino - Biloxi Slots: 1,256 Tables: 49+3poker Hotel Rooms: 479

**Harrah's Gulf Coast - Biloxi** Slots: 768 Tables: 31 Hotel Rooms: 494

Hollywood Gulf Coast — Bay St. Louis Slots: 1,145 Tables: 19+5 poker Hotel Rooms: 291

**IP Casino Resort Spa - Biloxi** Slots: 1,659 Tables: 59+13 poker Hotel Rooms: 1,077 Island View Casino Resort — Gulfport Slots: 1,956 Tables: 42 Hotel Rooms: 565 + 405 (new tower) = 970

Palace Casino Resort - Biloxi Slots: 879 Tables: 26 Hotel Rooms: 234

Scarlet Pearl Casino & Hotel (opened December 2015) Slots: 1,350 Tables: 45 Hotel Rooms: 300

Silver Slipper Casino - Bay St. Louis Slots: 956 Tables: 28 Hotel Rooms: 129 (new hotel)

**Treasure Bay Casino & Hotel - Biloxi** Slots: 816 Tables: 26 Hotel Rooms: 206 Ameristar Casino Hotel 4116 Washington Street Vicksburg, MS 39180 (601) 638-1000 www.ameristar.com

BALLY'S TUNICA 1450 Bally Boulevard Tunica Resorts, MS 38664 (662) 357-1780 www.ballystunica.com

BEAU RIUAGE A MGM RESORT 875 Beach Boulevard Biloxi, MS 39530-2307 (228) 386-7111 www.beaurivage.com

Boomtown Casino 676 Bayview Avenue Biloxi, MS 39530-2307 (800) 627-0777 www.boomtownbiloxi.co

DIAMONDJACK'S CASINO & HOTEL – UICKSBURG 3990 WASHINGTON STREET VICKSBURG, MS 39182 (877) 711-0677

FITZ CASINO & HOTEL 711 Lucky Lane Tunica, MS 38664 (662) 363-5825 www.fitzgeraldstunica.com

GOLDEN NUGGET - BILOKI 151 Beach Boulevard Biloxi, MS 39530 (800) 777-7568 www.goldnugget.com/biloxi/

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(002) 357-1111 www.goldstrike.com HARD ROCK CASINO - BILOXI

777 Beach Boulevard Biloxi, MS 39530 (228) 374-ROCK www.hardrockbiloxi.com

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HOLLYWOOD CASINO - TUNICA 1150 Casino Strip Resort Boulevard Tunica Resorts, MS 38664 (800) 871-0711 www.hollywoodcasinotunica.com

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RIVERWALK CASINO HOTEL 1046 Warrenton Road Vicksburg, MS 39180 (601) 634-0100 www.riverwalkvicksburg.com

#### TUNICA ROADHOUSE CASINO & HOTEL

1107 Casino Center Drive Tunica Resorts, MS 38664 (800) 391-3777 www.tunica-roadhouse.com

Sam's Town Tunica

1477 Casino Strip Blvd. Tunica Resorts, MS 38664 (662) 363-0711 www.samstowntunica.com

SCARLET PEARL CASINO & HOTEL 9380 Central Avenue D'Iberville, MS 39540 (229) 392-1889

www.scarletpearlcasino.com

SILVER SLIPPER CASINO 5000 South Beach Boulevard Bay St. Louis, MS 39520 (228) 469-2777 www.silverslipper-ms.com

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Roy Anderson Corp. www.rac.com

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STEWART SNEED & HEWES www.stewartsneedhewes.com

THE TALON GROUP www.talongroup.us

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Designates association partner.



### EDITOR'S COMMENTS

Michael Bruffey is MGHA Deputy Director and Editor of the MGHA Annual Report.

### CONTRIBUTORS AND RESOURCES:

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> FOCUS GROUP www.focusgroupms.com

SHAUGHNESSY PRINTING www.shaughnessyprintingco.com

> MDA – Tourism www.visitmississippi.org

TUNICA UISITORS & CONVENTION BUREAU www.tunicatravel.com

GULFPORT-BILOXI INTERNATIONAL AIRPORT www.flygpt.com

### LIST OF SOURCES

For a list of the sources we relied upon for data and information, please go to our website (www.msgaming.org) and you will find it listed under the tab, Annual Report.



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