



STATE OF THE INDUSTRY **ANNUAL REPORT**

MISSISSIPPI GAMING 2015



The State of the Industry Annual Report is a publication prepared by the Mississippi Gaming & Hospitality Association. MGHA is a non-profit organization comprised of casino executives who represent the interests of the Mississippi commercial gaming industry. For questions about this report or MGHA, please visit www.msgaming.org or call 601-965-6992.



report highlights & **TABLE of CONTENTS**

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welcome letter **FROM the CHAIR**

To begin on a personal note, 2015 holds a milestone for me, marking 20 years since I first moved to Mississippi from Illinois. Having worked the majority of my professional life in gaming and hospitality in Mississippi, I am incredibly proud to be Chair of the Mississippi Gaming & Hospitality Association. I've had the opportunity to operate in all three gaming regions of Mississippi and have seen the profound impact gaming has made on the Mississippi economy and the local communities where it operates.

In late 2014, the American Gaming Association released highlights from an Oxford Economics' study, outlining the incredible economic impact the gaming industry has on the U.S. economy. Within the State of the Industry Report, you will see some of the statistics related to gaming in Mississippi, most notably that the Mississippi gaming industry generated approximately \$935 million in tax revenues in fiscal year 2014.

This past year was bittersweet for gaming in Mississippi. Given the large geographic area of our state, we are impacted by competition from several states. We saw growth in some areas and decline in others, and two operators closed their doors. Although the landscape is changing with additional competition from other states, 71% of the 21 million annual visitors to Mississippi also are casino visitors. As an Association, consisting of all of the commercial casino operators in the state (currently 28 operators), we are working together to explore new ways to enhance our offerings and to market Mississippi throughout the U.S.

As noted in the report, in 2014 gaming operators invested in Mississippi, not only in capital projects, but through community involvement as well as spending in excess of \$100 million to bring visitors to the state. Our industry is working closer than ever with tourism stakeholders, elected officials and community leaders, forging new partnerships within our state as well as regionally. The spirit of collaboration has never been greater.

We hope that you will share in our celebration of the industry and our vision for the gaming and tourism industries to move forward together. The Mississippi Gaming & Hospitality Association is pleased to present this, its sixth annual State of the Industry Annual Report: Mississippi Gaming 2015.

In Partnership,

Susan Varnes

Susan Varnes
MGHA Chair



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. All 28 commercial casinos in Mississippi are members of the MGHA; and the Association advocates for policies would allow Mississippi's commercial casino operators to stay strong and to support the state's \$6.2 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 overall economy. With that in mind, MGHA offers some 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 \$6.2 billion tourism industry and make the state's workforce more competitive.
- Continue to support the state's and the industry's initiatives to combat problem gambling.

The gaming tourism industry has grown into a well-capitalized economic sustainer over the past 20 years and is a vital part of the overall tourism industry. The Association will continue to work with its Members and Associate Members to enhance and grow tourism throughout the state.

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2015 OFFICERS & CURRENT BOARD MEMBERS

OFFICERS

Susan Varnes, Chair
Treasure Bay Casino & Hotel

Paul Avery, Vice Chair
Lady Luck Casino Vicksburg

Lee Dillard, Treasurer
Tunica Roadhouse Casino & Hotel

Cathy Beeding Mackenzie, Secretary
Island View Casino Resort

BOARD MEMBERS

R. Scott Barber
Horseshoe Tunica Hotel & Casino

Toni Burns
Sam's Town Tunica

Anthony Carlucci
Hollywood Casino Gulf Coast

Keith Crosby
Palace Casino Resort

Anthony Del Vescovo
Beau Rivage

John Ferrucci
Silver Slipper Casino & Hotel

Felicia Gavin
DiamondJacks Casino & Hotel

Roscoe Green, Jr.
Trop Casino Greenville

Bill Gustafson
Isle of Capri Casino & Hotel - Lula

Chett Harrison
Golden Nugget Biloxi

Greg Hinton
Harlow's Casino Resort & Spa

Wade Hawk
Boomtown Casino

Annie Jenkins
Ameristar Casino Hotel

Jonathan Jones
Harrah's Gulf Coast

Steve Lambert
Hollywood Casino Tunica

Eddie Llambias
Bally's Casino Tunica

Duncan McKenzie
IP Casino Resort Spa

Chuck Miller
Fitz Casino & Hotel

Kevin Preston
Magnolia Bluffs Casino

Todd Raziano
Hard Rock Hotel & Casino Biloxi

Niklas Rytterstrom
Gold Strike

Anthony Scudiero
Resorts Casino Tunica

Dick Stewart
Isle of Capri Casino & Hotel - Natchez

Ginny Tzotzolas
Riverwalk Casino & Hotel



MISSISSIPPI COMMERCIAL GAMING'S \$4.1 BILLION IMPACT

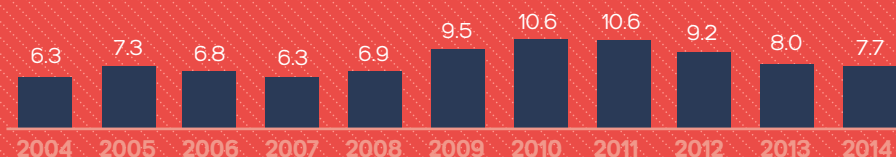
In a study released in November 2014 by the American Gaming Association and Oxford Economics, it was recorded that casinos generated direct output of \$2.6 billion (that is, total gaming and non-gaming revenue generated by casinos) and generated \$0.6 billion in indirect output and \$0.9 billion in induced output, resulting in a statewide economic impact of approximately \$4.1 billion.



\$935 MILLION
TOTAL GAMING GENERATED TAX REVENUES IN FY 2014

GAMING PROVIDES
\$1.5 BILLION
IN TOTAL LABOR INCOME

IN 2014, UNEMPLOYMENT IN MISSISSIPPI **FELL TO 7.7%**, THE LOWEST SINCE 2008.



WITHOUT THE GAMING INDUSTRY,
UNEMPLOYMENT WOULD BE 11.7%.

GAMING SUPPORTS MORE THAN **37,000 JOBS.**



HIGHLIGHTS *from* 2014

1. Hard Rock Casino Biloxi opened \$32.5 million Platinum Tower, first quarter 2014.
2. Golden Nugget completed \$100 million in renovations to Biloxi property.
3. Hollywood Casino Bay St. Louis added lazy river, Summer 2014.
4. Twin River Worldwide acquired Hard Rock Casino Biloxi for \$250 million.
5. In the Summer of 2014, Harrah's Gulf Coast completed a rebrand and also redesigned the property with three new outlets, an outdoor facility - "The Great Lawn" and upgraded gaming and hotel features.
6. Silver Slipper in Bay St. Louis topped off its new \$17.7 million hotel, scheduled to open in April 2015.
7. Island View Casino nears completion of \$60 million renovation to Beach Tower in Gulfport, scheduled to open in April 2015.
8. Boyd Gaming has invested over \$70 Million in renovations and upgrades to the IP Casino Resort Spa.
9. Beau Rivage commits land to City of Biloxi to build MGM Park to house minor league baseball scheduled to open Spring 2015.
10. Tunica's Casino Strip properties (Hollywood, Resorts and Sam's Town) hosted a multi-property slot tournament.
11. Tunica's Caesar and MGM properties (Horseshoe, Roadhouse and Gold Strike) initiated joint-marketing programs.
12. In direct response to Governor Phil Bryant's "Creative Economy Initiative" for the State of Mississippi, Harlow's participated in the inaugural Mississippi Dragon Boat Festival hosted by the City of Greenville.
13. Harrah's Tunica and Margaritaville Casino in Biloxi closed leaving Mississippi with 28 operating casinos
14. Scarlett Pearl, LLC, the first casino in D'Iberville, has broken ground and is planning to open December 2015.

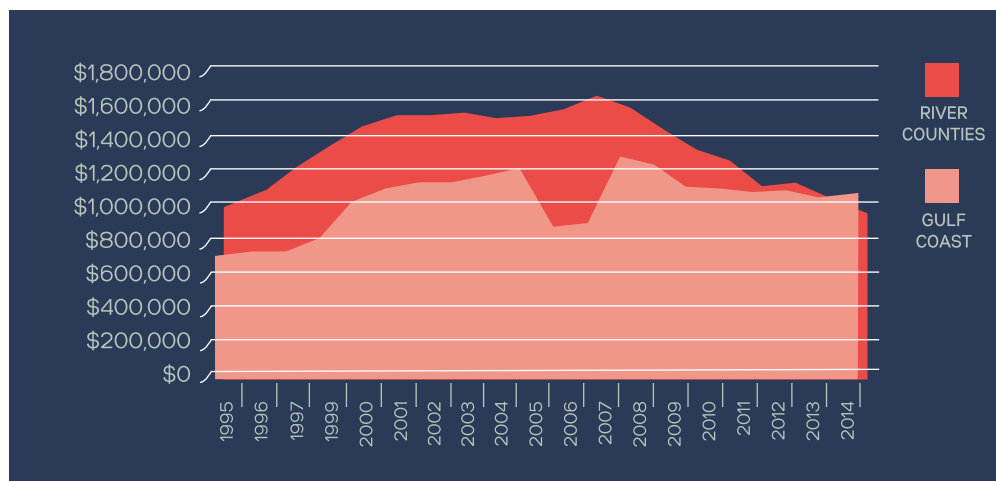
CASINO OPERATORS & EMPLOYEES GIVE BACK TO THEIR COMMUNITY

Casino employees across Mississippi constantly find ways to make their communities better. Throughout the year, employees can be seen serving meals at local food missions, donating canned and nonperishable items to community pantries and calling bingo games at senior citizens centers. They build houses with Habitat for Humanity, collect toys for Salvation Army programs and they raise money for United Way and other organizations through charity walks, car washes and bake sales. They also 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 giving back to communities in which employees and casino guests live and work.

2014 GAMING REVENUES

In 2014, two gaming operators closed, one in the northern region and one on the Gulf Coast, leaving 28 commercial casinos reporting \$2.07 billion in gaming revenues compared to \$2.13 in 2013, a 3.2% statewide decline. While the Gulf Coast increased revenue by 1.5% over 2013, the river counties continued to experience declining revenue. For the first time in the history of Mississippi gaming, the Gulf Coast casinos earned more annual revenue than the river counties.

AGR (\$000) / YEAR



OBSERVATIONS

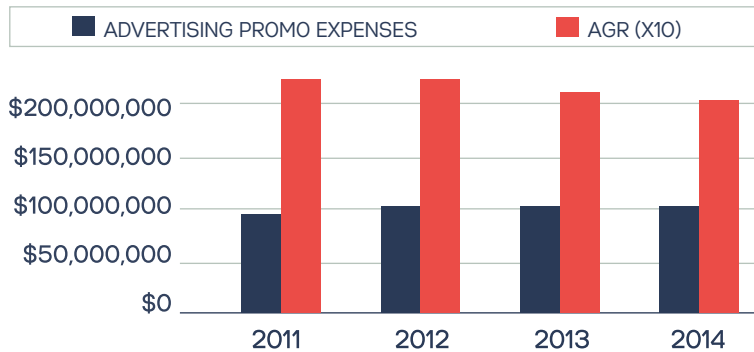
- » Gaming revenue from 2009 to 2013 along the Gulf Coast is almost flat, with 2014 marking the first year over year increase since 2007.
- » Extensive reinvestment of capital along the Gulf Coast has helped the gaming industry thrive.
- » River counties have shown gradual decline, beginning with 2008's recession, dipping further after the floods of 2011 and continuing to slide due to persistent out-of-state competition.
- » Declines similar to Tunica have been seen in other parts of the country, prompting officials to study opportunities such as internet gaming and legal sports betting.
- » Officials, with support from the industry, are also looking at investing more in "non-gaming amenities".
- » Efforts by the Mississippi Development Authority and regional CVBs continued with "Destination Marketing" of Mississippi offerings to families and casino goers.
- » In 2015, it is expected that Mississippi and Louisiana will be working together to find ways to attract visitors to both states.

IN 2014, 15 MILLION VISITORS CAME TO MISSISSIPPI CASINOS FROM OUT OF STATE

STATE	2011 VISITATION	2013 VISITATION	2014 VISITATION
ALABAMA	2,971,060	2,850,661	2,845,187
ARKANSAS	1,821,492	1,275,397	1,123,914
FLORIDA	2,504,034	2,329,493	2,361,602
GEORGIA	1,364,007	1,064,334	1,032,624
ILLINOIS	402,739	273,566	245,035
INDIANA	178,729	124,693	114,476
LOUISIANA	4,253,554	3,237,043	3,260,595
MISSOURI	434,774	265,141	240,215
NORTH CAROLINA	156,134	119,968	112,536
OHIO	179,216	126,627	111,458
OKLAHOMA	101,859	63,960	54,845
TENNESSEE	3,276,207	2,108,882	1,825,485
TEXAS	681,415	584,448	583,685
OTHER	2,001,784	1,380,787	1,149,437
OUT OF STATE TOTALS	20,325,899	15,810,000	15,061,094
MISSISSIPPI TOTALS	8,721,042	8,966,610	8,504,284

Gaming sees increase in visitation from LA and FL; while AR and TN continue to decline.

IN THE PAST THREE YEARS, GAMING OPERATORS REPORT TO MGC SPENDING MORE THAN \$100 MILLION IN ADVERTISING & PROMOTIONS



Since 2012, casino operators have reported spending more than \$100 million on advertising and promotions. Notably, these numbers have increased slightly each of the past three years - reaching approximately \$106 million in 2014 even though two casinos closed during the year. This illustrates that even if revenues decline, operators must spend more to keep customers coming back. "It takes a real commitment on the part of the operators to keep customers coming back," said Chett Harrison, Vice President and General Manager of the Golden Nugget Biloxi. "This is especially the case with the expansion of gaming in neighboring states." He added, "It starts with great customer service, providing a top quality experience in every aspect of the business whether it is in gaming, restaurants, hotel rooms, spas or on the golf course."

GAMING'S IMPACT ON THE TOURISM INDUSTRY

21.6 MILLION
VISITORS TRAVELED TO



SPENDING APPROXIMATELY
\$6.2 BILLION
IN THE STATE

The Mississippi Development Authority (MDA) reported that more than 21 million visitors traveled to Mississippi, generating approximately \$6.2 billion in purchases. By comparison, casinos had more than 15 million out-of-state visitors, representing more than 71% of the visitors in Mississippi.

TOURISM CREATES 85,000 JOBS; 37,000 JOBS ASSOCIATED WITH THE TRAVEL AND TOURISM INDUSTRY ARE SUPPORTED BY THE GAMING INDUSTRY

MDA reported that travel and tourism are responsible for 85,000 direct jobs and 32,000 indirect or induced jobs. The Oxford Economics business study reports that 37,000 jobs in Mississippi are supported by gaming, representing almost one-half of the jobs associated with the travel and tourism industry.

GOVERNOR SUPPORTS INCREASE IN FUNDING FOR MARKETING TOURISM

Last year, Governor Bryant discussed the importance of tourism, noting that the travel and tourism industry is the 4th largest industry in the state. In committing \$15 million from the BP Settlement Fund to assist in building the minor league baseball stadium in Biloxi, a total project worth nearly \$40 million (including the land), the Governor spoke about adding new tourism attractions in the state, including along the Mississippi Gulf Coast.

This year, Governor Bryant announced that he is asking the Mississippi Legislature to allocate an additional \$5.1 million for marketing the state's tourism amenities bringing the marketing budget to \$8.1 million. Malcom White, who heads up tourism for the Mississippi Development Authority commented that Bryant is the first governor in memory to propose increasing the amount spent on tourism marketing. White said the additional funding will provide for direct marketing as well as provide matching grants to local tourism agencies. By exposing more people to the Mississippi story, casino resorts and other aspects of Mississippi's authentic history, culture and natural amenities, White expects to see positive results in visitation numbers, which reached 21.6 million in 2013. Clearly there is both a real need and commitment to tourism in Mississippi, which includes gaming, as this industry provides for many jobs and bolsters the overall economy in Mississippi.

MISSISSIPPI RISES TO REGIONAL GAMING CHALLENGES



The demographics of those going to casinos and those who are tourists may be somewhat different, but they have commonality in some respects, including from where they are traveling. As reflected in the visitation statistics reported to the Mississippi Gaming Commission, more than 15 million of the visitors to Mississippi

casinos come from out of state (more than two-thirds). Mississippi serves as a double threat as it boasts both gaming and tourism.

The national gaming industry has taken off in the past 20 years, from commercial casino business to tribal gaming operators; however, three variables, both good and bad, have added to the growing challenge for regional gaming markets in the past five years:

- » **EXPONENTIAL GROWTH IN CASINO GAMING SUPPLY**
- » **ECONOMIC GROWTH AND INDIVIDUAL DISCRETIONARY INCOMES HAVE STAGNATED**
- » **TECHNOLOGY ADVANCES CONTINUE TO PUT ENTERTAINMENT AT EVERYONE'S FINGERTIPS**

These variables have contributed to the emergent need to be product-driven and marketing-intensive. Since 2012, Mississippi casinos reported spending more than \$100 million in advertising and promotions. In addition to marketing, individual operators have to constantly give people new and better reasons to visit gaming facilities, and those reasons have to be sold skillfully and aggressively. Additionally, numerous Mississippi operators have made substantial capital reinvestment in their businesses over the past two years. To grow more amenities, many of our gaming facilities are adding clubs, lounges, updated pools, spas and other amenities.

This approach has also been seen in Louisiana. In December 2014, the Golden Nugget opened a \$700 million casino in Lake Charles. The project, built by Tilman Fertitta's company, is expected to draw large crowds from Houston, Texas. This facility boasts a 247-acre property with an 18,000 square foot ballroom, meeting space, restaurants, bars and boutiques as well as a top-notch golf course.

Stagnancy doesn't sell and the investments made by Mississippi casino operators, as well as those in Louisiana, serve as examples of how positive market conditions can encourage further capital investments in new and existing properties. Unfortunately, not all markets have been able to make these kinds of investments due to increased competition and declining revenues. With this in mind, Mississippi hopes to work with Louisiana in pursuing joint marketing efforts in 2015.

As reflected in the charts, Mississippi and Louisiana combine to be the 2nd largest gaming market in the United States. A partnership approach with Louisiana could bolster regional marketing, so that both states can jointly capture out-of-state visitors to their gaming properties and tourism destinations. Capitalizing on the fact that Mississippi and Louisiana, combined, represent the second largest gaming market in the country, can only serve to benefit both states.

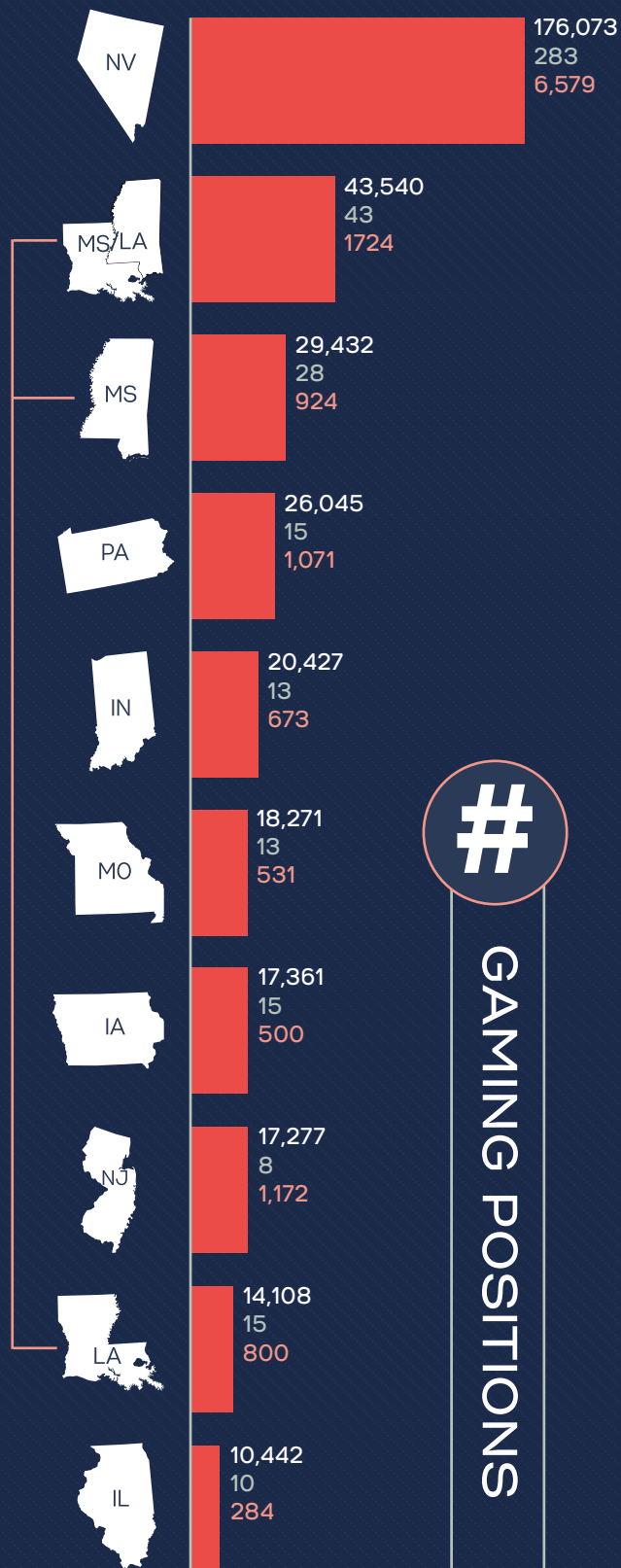
An example of joint marketing by the Gulf Coast states was seen following the BP Oil Spill in 2010. This effort proved to have a positive impact on tourism for all five states that were affected. Mississippi and Louisiana represent the two Gulf States that have legalized and are fully invested in gaming. Mississippi and Louisiana State and Regional tourism bureaus, which include members of the gaming industry, are currently working together through Brand USA, the travel trade industry and other joint efforts to market our area as a regional destination for international and domestic travelers. It only makes sense for us to work together in marketing our region in terms of tourism and gaming. We look forward to seeing what comes of this effort in 2015 and beyond.

In Partnership,

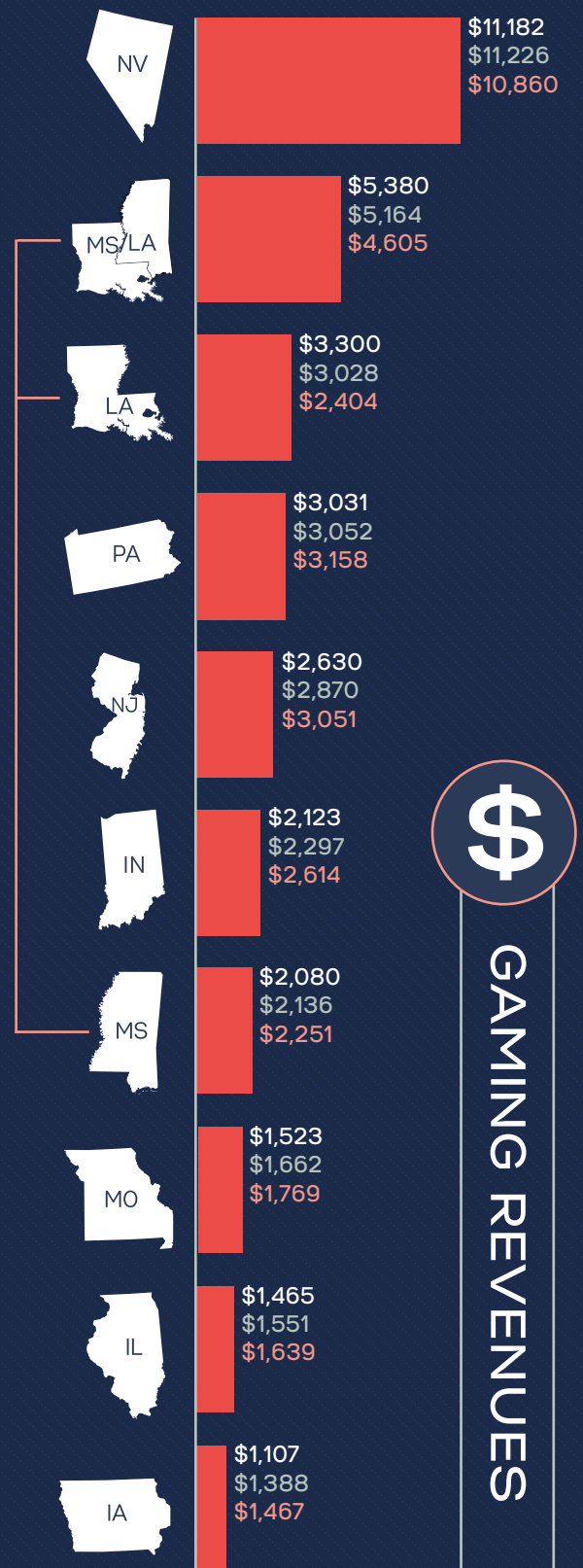
Larry Gregory

Larry Gregory
MGHA Executive Director





POSITIONS BY SLOTS | # OF CASINOS | POSITIONS (OTHER)



2014 REVENUE | 2013 REVENUE | 2012 REVENUE

tourism & GAMING

FOCUSING ON AMENITIES TO INCREASE VISITATION

In 2011, the Tunica Convention and Visitors Bureau commissioned a study of the Tunica market with Price Waterhouse Coopers. What came from the report is still resonating today; that is, non-gaming amenities are necessary to attract visitors to gaming markets. 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 December 2014, Caesars' Chairman, Gary Loveman, appeared before the Mississippi Gaming Commission, which provided commissioners with the opportunity to discuss this concept with Mr. Loveman.

MGC Chairman, John Hairston, commented on Rule 1.5 and the aim of the commission to do what it can to bring amenities to gaming markets. Mr. Loveman urged the commissioners and other state officials to continue in this effort, especially in markets like Tunica which already has an infrastructure in place to support an increase in tourism, including an airport. Thus, it appears the common goal of the MDA, the Governor, gaming officials and gaming operators is to increase visitation to Mississippi.

RULE 1.5 - The project will also have or support an amenity that will be unique to the market and will encourage economic development and promote tourism.

PUBLIC PRIVATE PROJECTS

In the State of the Industry 2014, several projects generated from the Gulf Coast Restoration Trust Fund (valued at \$800 million) were highlighted, including the plans to build a \$36 million Minor League Baseball stadium in Biloxi (\$15 million from the GCRT Fund). This project is under construction and is expected to be complete in time for the opening pitch, April 2015.

"The oil spill of 2010 had a significant impact in Mississippi, especially on coastal tourism... This stadium will be a major regional asset for South Mississippi and will be an exciting new attraction for our residents and tourists of Mississippi's Gulf Coast."

- Governor Phil Bryant

In 2014, the MGHA's annual report highlighted regional competition for Mississippi's commercial casinos, noting the increase in gaming supply in the Southeastern United States. This is one of many reasons for why tourism and amenities are vital in bringing visitors to the state. As noted, the Go Coast 2020 report recommended several initiatives that may increase tourism. These topics continue to be relevant, especially with Mississippi and the other four Gulf Coast states expecting to receive millions of dollars in funds resulting from fines that will be levied against those responsible for the BP Oil Spill.



"The Coast market is stabilizing and showing signs of expansion. The River and Tunica markets continue to decline, but the downward pace is slowing. Expansion can only come with a greater set of thematic amenities to attract visitors," said Chairman Hairston.



MGM Park under construction



The Scarlett Pearl casino project in D'Iberville is the first casino to be approved under the guise of Rule 1.5. Owners plan to open the casino project in December 2015. *"The Scarlett Pearl has a family golf amenity that would not have happened without Regulation 1.5. Every time we add a valuable amenity, we grow the total pie by a little more," said Chairman Hairston.*



competitive **CHALLENGES** *in* 2015

While much is happening and hopes are high, local operators are watching activity in the surrounding states to try and gauge its potential impact.

ALABAMA: About 13% of visitors to Mississippi came from Alabama in 2014, with the Gulf Coast receiving about 17% of its business from Alabama visitors and the northern region receiving about 5.4% of its business from Alabama. Overall visitation from Alabama held steady at 2.85 million in spite of the Poarch Band of Creek Indian Tribe (Poarch Creek Tribe) opening a property with electronic “bingo” games in Wetumpka, Alabama near Montgomery, and the substantial renovations to its Atmore facility in the last five years.

ARKANSAS & TENNESSEE: Approximately 13% of the visitors from out-of-state travel from Arkansas and Tennessee, with 49% of visitation to casinos in the northern region traveled from these two states. Notably, the two casinos in Arkansas - Southland Park and Oaklawn Racing - have thrived since the flooding of 2011, while the casinos in the northern region have continued to see a decline in visitation.

LOUISIANA: In 2014, out of state visitors from Louisiana to Mississippi casinos increased just slightly coming in at 3.26 million. Louisiana accounts for 20% of the visitors to the Mississippi Gulf Coast and 15% of the visitors to the central region of Mississippi. The big news coming out of Louisiana in 2014 was the opening of the \$700 million Golden Nugget Casino in Lake Charles. Notably, the Golden Nugget along with Caesars, Boyd Gaming, Penn National, Full House Resorts, Ameristar, Churchill Downs, Legends Gaming and Isle of Capri are all operating in both Mississippi and Louisiana. With the cross marketing between properties, visitation between the states should remain strong.

FLORIDA: Like Louisiana, the number of visitors from Florida to Mississippi casinos increased slightly in 2014 to 2.36 million. 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. Talks of expanding gaming continue in the 2015 legislative session although there continues to be significant opposition to gaming expansion in Florida.

GEORGIA: Over one million visitors traveled from Georgia to visit Mississippi casinos in 2014, accounting for about 6.3% of the visitors to the Mississippi Gulf Coast and about 2% of the visitors to the northern region casinos. These numbers have held steady in spite of the new casinos Poarch Creek Tribe opened in Alabama, which is encouraging news.

INDIAN GAMING: A national report shows that revenue from Indian gaming continues to grow.

BY THE NUMBERS – NORTH RIVER MARKET

2014 Market Statistics and Highlights

GROSS REVENUES: **\$936,702,777**

AGR: \$687,683,015

Slots: 9,221

Casinos: 9

Table Games/Poker: 372

Hotel Rooms: 4,451

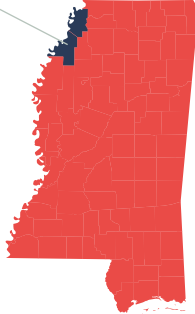
Poker Games: 53

Occupancy: 72.65%

Direct Employees: 6,496

ADR: \$53.56

Visitation: 5.2 million



2014 MGHA MEMBERS PROPERTIES in the North River Gaming Market

Fitz Casino & Hotel - Tunica

Slots: 1,057

Tables: 20

Hotel Rooms: 506

Horseshoe Casino & Hotel - Tunica

Slots: 1,116

Tables: 75+24 poker

Hotel Rooms: 507

Gold Strike Casino Resort - Tunica

Slots: 1,370

Tables: 59

Hotel Rooms: 1,133

Resorts - Tunica

Slots: 812

Tables: 14

Hotel Rooms: 201

Roadhouse Casino & Hotel - Tunica

Slots: 700

Tables: 24

Hotel Rooms: 135

Isle of Capri Lula

Slots: 909

Tables: 20

Hotel Rooms: 485
+ 28RV

Bally's - Tunica

Slots: 943

Tables: 16

Hotel Rooms: 238

Hollywood Casino - Tunica

Slots: 1,095

Tables: 21+6 poker

Hotel Rooms: 494

BY THE NUMBERS— SOUTH RIVER MARKET

2014 Market Statistics and Highlights

GROSS REVENUES: **\$387,463,682**

AGR*: \$307,866,406

Slots: 5,637

Casinos: 8

Table Games/Poker: 114

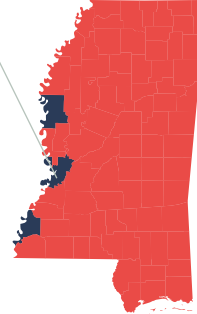
Hotel Rooms: 709

Occupancy: 71.37%

Direct Employees: 2,956

ADR: \$68.81

Visitation: 3.08 million



2014 MGHA MEMBERS PROPERTIES in the South River Gaming Market

Magnolia Bluffs Casino – Natchez

Slots: 475

Tables: 16

Hotel Rooms: 0

Lady Luck Hotel Casino – Vicksburg

Slots: 588

Tables: 8

Hotel Rooms: 89

Isle of Capri Casino & Hotel – Natchez

Slots: 535

Tables: 6

Hotel Rooms: 124

Riverwalk Casino Hotel – Vicksburg

Slots: 689

Tables: 14

Hotel Rooms: 80

Harlow's Casino Resort & Hotel – Greenville

Slots: 744

Tables: 13

Hotel Rooms: 105

Trop Casino – Greenville

Slots: 410

Tables: 7

Hotel Rooms: 40

Ameristar Casino – Vicksburg

Slots: 1,554

Tables: 27+10 poker

Hotel Rooms: 149

BY THE NUMBERS –

GULF COAST MARKET

2014 Market Statistics and Highlights

GROSS REVENUES: **\$1,535,898,546**

AGR: \$1,078,635,757

Slots: 14,574

Casinos: 11

Table Games/Poker: 501

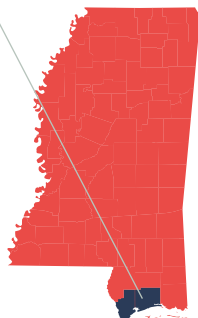
Hotel Rooms: 5,808

Occupancy: 93.71%

Direct Employees: 11,707

ADR: \$74.07

Visitation: 15.3 million



2014 MGHA MEMBERS PROPERTIES in the Gulf Coast Gaming Market

Beau Rivage Resort Casino – Biloxi

Slots: 1,973

Tables: 83+16 poker

Hotel Rooms: 1,740

Boomtown Casino – Biloxi

Slots: 967

Tables: 16

Hotel Rooms: 0

Golden Nugget – Biloxi

Slots: 1,228

Tables: 54 + 9 poker

Hotel Rooms: 705

Hard Rock Hotel & Casino – Biloxi

Slots: 1,343

Tables: 51+4 poker

Hotel Rooms: 479

Harrah's Gulf Coast

Slots: 781

Tables: 31

Hotel Rooms: 494

Hollywood Casino Resort – Bay St. Louis

Slots: 1,155

Tables: 19+5 poker

Hotel Rooms: 291

IP Casino Resort Spa – Biloxi

Slots: 1,754

Tables: 62+13 poker

Hotel Rooms: 1,088

Island View Casino Resort – Gulfport

Slots: 1,967

Tables: 42

Hotel Rooms: 565

Palace Casino Resort – Biloxi

Slots: 885

Tables: 26

Hotel Rooms: 234

Silver Slipper Casino – Bay St. Louis

Slots: 963

Tables: 26

Hotel Rooms: planned for 2015

Treasure Bay Casino & Hotel – Biloxi

Slots: 817

Tables: 26

Hotel Rooms: 207

MGHA MEMBER DIRECTORY

Ameristar Casino Hotel
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(228) 386-7111
www.beaurivage.com

Bally's Tunica
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www.boomtownbiloxi.com

DiamondJacks Casinos-Vicksburg
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www.diamondjacks.com

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www.goldnugget.com/biloxi/

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www.samstowntunica.com

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Rex Distributing Company
www.rexdistributingcompany.com

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www.rac.com

Shaugnessy Printing
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www.stewartsneedhewes.com

The Talon Group
www.talongroup.us

Tunica Convention & Visitors Bureau
www.tunicatravel.com

YATES Construction
www.wgyates.com

To learn more about the MGHA or for membership information, please visit our website at www.msgaming.org



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Larry Gregory
Executive Director

Michael Bruffey
Deputy Director



list of sources

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- » American Gaming Association, Oxford Economics Study, published November 2014

WEBSITES:

- » Mississippi Gaming Commission – Reports and Archives (www.msgamingcommission.com)
- » Indiana Gaming Commission – Annual Reports (<https://secure.in.gov/igc/2362.htm>)
- » Louisiana Gaming Control Board – Annual Reports (www.lgcb.dps.louisiana.gov)
- » United State Casinos (<http://unitedstatescasinos.org/>)
- » Bureau of Labor Statistics (www.bls.gov)

ARTICLES:

- » http://www.sunherald.com/2014/12/26/5988473_2014-a-year-of-ups-and-downs-for.html?rh=1
- » <http://www.natchezdemocrat.com/2014/11/30/gov-bryant-wants-to-boost-tourism-marketing-budget/>
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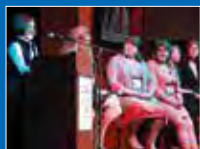


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Keith Smith
President & CEO
Boyd Gaming

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