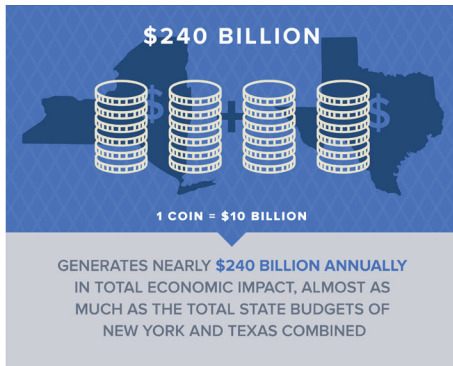


GAMING'S QUARTER OF A TRILLION DOLLAR IMPACT ON THE U.S. ECONOMY

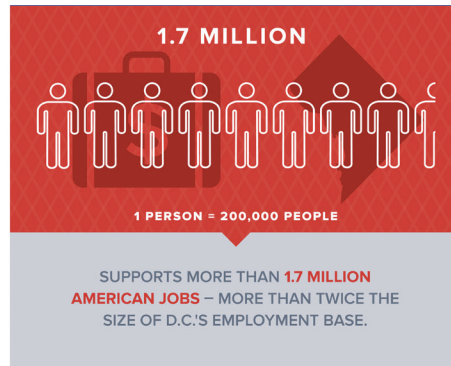
A new study by Oxford Economics makes unmistakably clear: The gaming industry is a powerful economic engine and a dynamic job creator.

BY THE NUMBERS

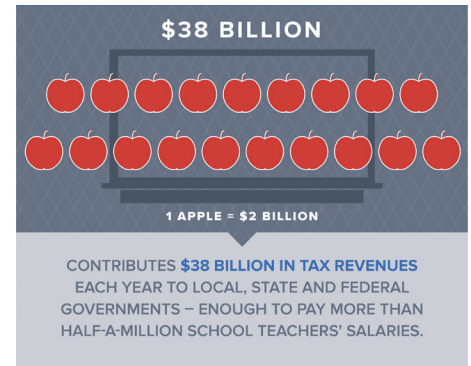
ECONOMIC IMPACT



JOBS



TAX REVENUES



Oxford's study is the first-ever to analyze data from U.S. commercial casinos, tribal casinos and gaming equipment manufacturers, presenting the most comprehensive assessment undertaken of the gaming industry's economic impact. The study was released by the American Gaming Association as part of its Get to Know Gaming campaign.

The gaming industry is a critical component of the U.S. economy. Nearly 1,000 casinos operate in 39 states. Americans have embraced gaming and spend more money enjoying the entertainment options casinos offer than they spend on spectator sports like football, baseball, basketball and soccer combined.

As total casino gaming revenues have reached historic highs, so have total wages paid to casino employees. In order for the gaming industry to continue serving as an economic catalyst, policymakers must work with industry leaders to create policy environments that enable their communities to better compete with other markets, and that help to maximize gaming's ability to innovate, reinvest and contribute to local communities.

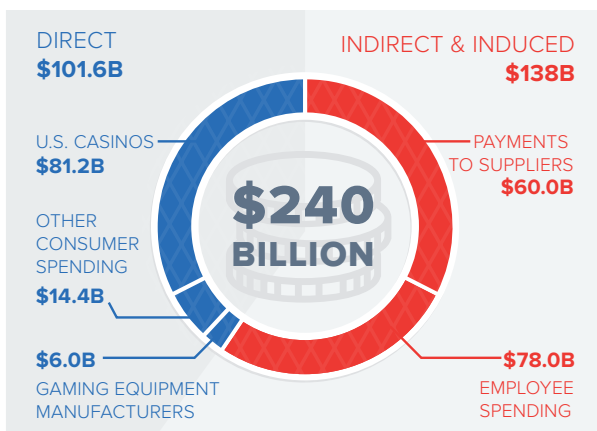
A Powerful Economic Engine: Gaming's \$240 Billion Contribution to the U.S. Economy

Oxford Economics estimates the U.S. gaming industry contributes nearly \$240 billion to the national economy – almost equal to Texas' and New York's state budgets combined.

- U.S. casinos, including those owned by Native American tribes, generate total revenues of more than \$81 billion. Casino gaming revenues – \$67 billion – are now at an historic peak.
- American gaming equipment manufacturers, which build the table games, slot machines, and other products and services on the casino floor, produce nearly \$6 billion in total revenues.
- The gaming industry generates more than \$14 billion in additional consumer spending at restaurants, retail stores, hotels and other businesses.

Gaming stimulates demand among many other industries across the national supply chain. Considering these added impacts, Oxford calculates that the gaming industry also creates approximately:

- \$60 billion in payments to suppliers, including many local; and
- \$78 billion from gaming employees' spending.

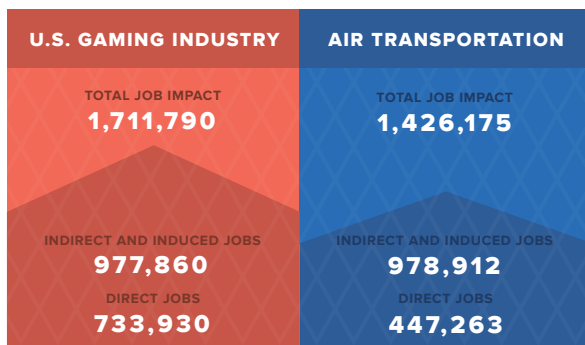


Putting America To Work: Gaming Supports 1.7 Million Jobs and Nearly \$74 Billion in Income

Casinos are one of the largest recreational employers in America, employing more workers than the airline industry or all spectator sports. In all, the gaming industry supports more than 1.7 million jobs throughout the economy. These jobs provide \$73.5 billion in income for American workers and their families. Total casino employee wages have reached all-time record highs.

- The industry alone directly employs 734,000 American workers, generating nearly \$33 billion in payroll.
- Casino purchases from suppliers support another approximately 383,000 jobs and spending by gaming employees sustains 595,000 jobs.

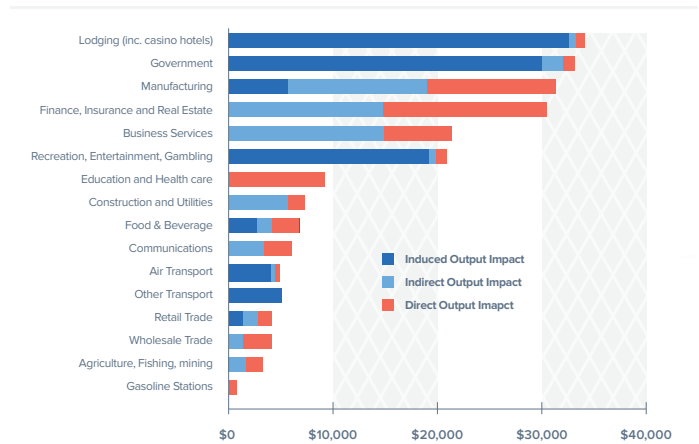
THE U.S. GAMING INDUSTRY SUPPORTS MORE JOBS THAN THE AIR TRANSPORTATION INDUSTRY



OXFORD ECONOMICS

GAMING BOOSTS INDUSTRIES ACROSS ALL SECTORS

DISTRIBUTION OF OUTPUT IMPACTS BY MAJOR INDUSTRY



Supporting Vital Public Services: Gaming Generates More Than \$38 Billion in Tax Revenues

The Oxford Economics study finds that the gaming industry pays:

- \$17.3 billion in federal taxes, including \$7 billion in Social Security taxes
- Approximately \$11 billion in state and local taxes, including \$4 billion in sales taxes and \$1.6 billion in personal income tax revenues
- Almost \$10 billion in state and local gaming taxes.

This \$38 billion-plus injection into public budgets pays for a range of services including public safety, hospitals and schools, just to name a few. In fact, total tax revenues generated by gaming are enough to pay more than half-a-million teachers' salaries.

Methodology & Definitions: Calculating Direct, Indirect and Induced Impacts

Oxford Economics' calculations of the gaming industry's direct economic impact include the revenues of U.S. commercial casinos, tribal casinos, gaming equipment manufacturers, and the spending by casino patrons at nearby businesses in 2013.

Oxford's economic impact model is based on an analysis of the direct effects of the gaming industry. As part of this analysis, the IMPLAN model is used to determine the indirect and induced impacts of direct spending. Indirect impacts include payments to the gaming industry's downstream suppliers, such as cleaning services, legal services, and food and equipment providers. Induced impacts are generated by the spending of gaming industry employees on rent, transportation, food, entertainment and other needs. Oxford determines total tax revenues based on a hybrid approach that incorporated analysis of certain direct taxes, such as gaming taxes, along with the IMPLAN framework of federal, state and local tax categories.



Get to Know Gaming

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