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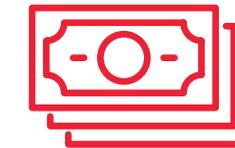
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Gaming in Pennsylvania by the Numbers

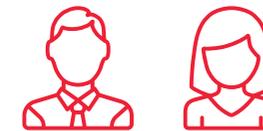


12 commercial casinos and racinos

\$2.5B generated in taxes



\$6.3B in total economic impact



33,171 jobs supported

\$1.8B in supported wages

“The gaming industry has literally been a game changer for Washington County. It equates, I would say, with the discovery of coal here back in the 1800s, 1900s, with the steel industry when it was in its heyday in the early part of the 20th century until about 30-40 years ago... It literally has changed our economy, our way of life, our quality of life and it has changed it all for the positive.”

Larry Maggi, Chairman
Washington County Board of Commissioners

“If it hadn't been for the casino, we would probably be in bankruptcy as a community.”

Thaddeus Kirkland, Mayor of Chester, Pennsylvania

15 Years of Gaming in Pennsylvania

2004

State legislators pass the Pennsylvania Race Horse Development and Gaming Act, legalizing casinos and racinos and creating the Pennsylvania Gaming Control Board to regulate and oversee gaming operations

2006

The first racinos in the state open in Wilkes-Barre and Bensalem

2007-2009

Seven additional casinos and racinos begin operations across Pennsylvania

2010

Legislature approves table games at licensed casinos and racinos

2017

The state legalizes online gaming, sports betting, video gaming terminals at truck stops and ten satellite casinos

2018

Grantville, Philadelphia and Pittsburgh become the first areas in the state to offer sports betting

Pennsylvania's 2017 gaming expansion authorized casinos to offer sports betting, pending a change in federal rules. Seven months later, the U.S. Supreme Court declared the *Professional and Amateur Sports Protection Act of 1992* unconstitutional, freeing the state to begin offering sports betting.

Pennsylvania in Depth: Philadelphia

Across the Commonwealth of Pennsylvania, casino gaming is helping thousands of families, businesses and communities thrive, diversify and build for the future. Having legalized casino gaming 15 years ago, Pennsylvania – which now generates the second highest commercial gaming revenue in the United States, behind only Nevada – is home to casinos and racinos that draw visitors from all over the region. This influx of people and economic activity has helped the state recover from the downturn in the manufacturing and mining industries that was keenly felt by communities across the state during the late 20th century.

Thaddeus Kirkland, who serves as Mayor of Chester, a Philadelphia suburb, remembers the days when his city, the oldest in the Commonwealth, was booming thanks to the shipbuilding, steel and automobile industries. “When those industries left, it put the city in real, real bad financial straits,” he said. “Jobs were limited, opportunities were limited and businesses just were not coming

“Folks now feel good about going to work in the morning. This casino has provided them with an opportunity to better take care of their families. To purchase homes and property. They feel good about that. And not just jobs, because sometimes jobs can come and go, but they provide them with career opportunities.”

Thaddeus Kirkland, Mayor of Chester, Pennsylvania

to the City of Chester.” In 2007, Caesars Entertainment's Harrah's Chester (now Harrah's Philadelphia) opened at the site of a former shipyard, bolstering the faltering city. “Harrah's was the first real economic development that we had in this city for quite some time – for decades. They took a bet on the city.” That bet paid off.

Up the road in King of Prussia, Boyd Gaming's Valley Forge Casino was similarly a “big, big part of that transition from a bad economy to a good economy” during the recovery from the 2008 recession, according to Eric Goldstein, Executive Director of King of Prussia's Business Improvement District. Not only because of the casino jobs created, but also due to the “amazing nightlife” opportunities for dining and attending live events that brought people in and kept local entertainment dollars in the community. “In the past four years, we've added almost 40 new restaurants at King of Prussia, which is crazy. You must have a lot of people to support that level of new business. The casino is obviously helping with that,” Goldstein added.

The impact of Pennsylvania casinos is not limited to their utility as economic engines, they also boost local government budgets and support a multitude of community causes. Greenwood Racing's Parx Casino in Bensalem Township, just northeast of Philadelphia, generates over \$8 million in casino property taxes annually. That money goes mostly to local schools but also helps the township fund first responders and emergency management systems, said Mayor Joseph DiGirolamo. Robert Tomlinson, who represents Bensalem in the State Senate, added that Parx Casino has “put \$90 million into over 800 organizations, above and beyond what they have to do. They sit on the boards of our addiction facilities, our homeless shelters... they've really taken an interest in the community.” That commitment to real community involvement is a breath of fresh air to local non-profits. Donna Patti, Chairwoman of the Bensalem Gaming Advisory Board, found that working with gaming CEOs and leaders is different, “they're not up in the ivory tower,” but are instead willing to be physically present for whatever is needed in the community.

Pennsylvania in Depth: Pittsburgh

In western Pennsylvania, communities in and around Pittsburgh have benefited from a similar economic upturn from gaming, which has helped fund public projects, created new career opportunities and benefited businesses and civic organizations alike. In Washington County, just south of the Steel City, Chairman of the County Board of Commissioners and life-long resident Larry Maggi remembers the stagnant economy before Penn National Gaming's Meadows Racetrack & Casino opened. "We were losing jobs, we were losing people, we were losing families." He equates the economic impact and excitement generated by the casino with the boon days of the local coal mining and steel industries. "Every community, large and small, has prospered and benefited from gaming being in Washington County."

Life-changing public projects are made possible because legal gaming markets in Pennsylvania are specifically designed to spur state and local economies. Over the past 11 years, gaming has generated almost half a billion dollars for Washington County, funding job creation, infrastructure and workforce development projects, according to Jeff Kotula, President of the Washington County Chamber of Commerce. "Those monies go right back into our economy. They go right back into new projects, encouraging more and more population growth, business investment and things of that nature in our community."



In Pittsburgh's North Shore, where the economy has had "its share of ups and downs," the arrival of Rush Street Gaming's Rivers Casino "offered a greater opportunity," according to LaShawn Burton-Faulk, Executive Director of the Manchester Citizens Corporation. She saw the benefit of gaming when tax dollars provided by the casino saved a live-work space development her organization was involved in. What Burton-Faulk appreciates most about the casino, though, is its efforts to "really integrate into the community."

Burton-Faulk was not alone in pointing out how a spirit of volunteerism and revenue from casinos have tangible positive impacts on Pennsylvania communities. When the Greater Washington County Food Bank needed a new location, local grant funding from casino revenue "made it possible," said Executive Director Connie Burd. The new building with its 800 sq. foot cooler and 400 sq. foot freezer has enabled the food bank to "get out a lot more fresh produce to people" than before the grant, and employees from The Meadows regularly volunteer their time giving out food to low-income families and seniors.

Local Hiring, Local Purchasing, Local Growth

With each casino in Pennsylvania comes thousands of jobs and career opportunities. From the food staff to the floor staff, it takes a village to create a smooth and enjoyable customer experience. Work opportunities are diverse and for many employees their first job in a casino was the first step in a long-lasting career. As Chris Kristofco, EVS Manager at Valley Forge Casino, observed "I would never have predicted, when I started at Parx that nine, ten years later I would still be in the gaming industry." In his experience, "the opportunity for advancement is all over."

For Kim Ley, Pit Manager at Rivers Casino, that was especially true. As an opening day employee, Ley was hired first to work the buffet, but soon progressed to greeter, busser, dealer and eventually to her supervisory role of pit manager for table games. Prior to establishing her career at Rivers Casino, Ley was working four jobs at once to make ends meet. Now her daughter will soon graduate college with Kim's financial support, which she wouldn't have been able to provide without her casino career.

Seventy-seven percent of casino employees believe the industry presents the opportunity to start at the ground floor and work up. For the 66 percent of employees without a four-year college degree, this can mean the chance to build a career that is often lacking in other industries.

In Pennsylvania, opportunities for people like Chris Kristofco and Kim Ley have largely stayed local. Eighty-two percent of casino jobs in Bensalem Township are held by Pennsylvanians, and large percentages by women and minorities, according to Senator

Tomlinson. For him, this signifies a willingness on the part of the industry to "be a good corporate partner" through their ongoing commitment to doing things right.

Job growth and economic stability extend far beyond the walls of a casino, as each property depends on local businesses for services and supplies. Chris Connors, Vice President of Casino Solutions at Heeter, a commercial print company, said the casino industry has contributed to sustaining Heeter's near 100-person workforce and the company's expansion to meet casinos' need for data processing and digital print expertise.

Vince Del Rossi, Owner and President of Health Mats Company in Chester, which provides entrance matting to local businesses, shared a similar story. Health Mats' growing business relationship with the gaming industry, which includes Harrah's Philadelphia, has enabled Del Rossi to add employees to his payroll to meet the increasing demand for his products.

There is also a multiplier effect, according to Jeff Kotula, related to where casino employees live, eat, and work. Those people depend on "cars and groceries and everything else" that must be purchased or used locally. Kotula said the presence of casinos has attracted other companies to Washington County "partly because of the casino and the perception of a very vibrant economy." The area where The Meadows is located was once devoid of economic activity, but now it's home to a Tanger Outlets mall and other businesses. These developments in tourism and retail attraction help to create out-of-town business and in-town convenience.

“Casinos have “provided for programming and opportunities for non-profits that wouldn’t otherwise be there. If the casino was absent, those opportunities would go along with it. There would simply be no source of funding for some of the programming that we’ve been able to undertake.”

Connie Burd, Executive Director, Greater Washington County Food Bank

“The sheer size of the gaming industry and its positive impact in our community is easily seen by driving anywhere around this county. It’s a great industry. And you as a chamber leader or a politician or a community leader need to embrace that.”

Jeff Kotula, President, Washington County Chamber of Commerce



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