

A Survey of Urban Gaming in America

Submitted to:
Gabrielino-Tongva Tribe

Submitted by:
Analysis Group, Inc.

Contact:
Alan Meister, Ph.D.
Analysis Group, Inc.
601 S. Figueroa Street,
Suite 1300
Los Angeles, CA 90017
213-896-4500 (phone)
213-623-4112 (fax)
ameister@analysisgroup.com

August 1, 2005

Executive Summary

The Gabrielino-Tongva Tribe (“**Gabrielino Tribe**”) is a state-recognized tribe in California with a well-documented ancestry in Los Angeles County. While the Tribe is currently landless, it intends to establish a reservation in a host city in Los Angeles County, where the Tribe holds geographic, cultural, and historical ties to the land.¹ If approved by the governing agencies, the Tribe proposes to build and operate a state-of-the-art resort casino (“**Gabrielino Casino Resort**”) on its reservation. The Gabrielino Casino Resort is likely to be situated within 20 miles of the geographic center of the Los Angeles metropolitan area, and consequently, would be considered “urban gaming.”

DEFINING “URBAN GAMING”

The phrase “urban gaming” has been often used but rarely defined. In order to define “urban gaming,” it is first necessary to identify what is meant by an urban area. Given the national movement toward suburbanization, an “urban area” is defined as the central metropolitan area within a heavily-populated county.

To lend precision and practicality, this report defines “urban gaming” along three dimensions: the size of the urban area; the distance between the geographic center of the urban area and available gaming; and the type of gaming.

- Size of the urban area – In order to capture and limit the sprawling nature of 21st Century metropolitan areas, an urban area is identified as a large, primary city located within a county with total population over 500,000. Thus, only larger cities with sufficient population in the metropolitan area are captured as urban areas.
- Distance between the geographic center of the urban area and available gaming – In order to reflect varying sizes of metropolitan areas and restrict the inclusion of gaming facilities to those within reasonable driving distances, “urban gaming” includes only those urban areas with at least one gaming facility within a 20-mile radius. The 20-mile radius is measured as a straight-line distance from the geographic center of the primary city. The 20-mile radius reflects a conservative estimate of suburbanization in the metropolitan area and assures that the gaming facility is accessible to most residents of the urban area. The geographic center is a chosen point in the downtown area of the primary city, which often has high-rise office buildings or is otherwise viewed as the city center.

¹ The Tribe is currently conducting discussions with host city candidates in Los Angeles County on a confidential basis. The Tribe insists that all potential sites be surrounded by suitable zoning, be sufficiently removed from residential areas and schools, and be served by a grid of at least three freeways.



- Type of gaming – Only casino gaming (i.e., commercial casinos, racinos, or Indian casinos) is considered to be “urban gaming.” Casino gaming is the most prevalent form of gaming and what is being proposed by the Gabrielino Tribe in Los Angeles County. While other forms of gaming, such as lotteries, pari-mutuel wagering, and cardrooms, may exist in many urban areas, they are not included in our restrictive definition of “urban gaming.”

This definition is intended to be both comprehensive and well-suited to the practical facts of urban gaming around the nation. By defining urban gaming in a straightforward and easy-to-understand manner, this survey reaches large cities with casino gaming, as well as large gaming facilities in metropolitan areas. However, it does not include many smaller cities with casino gaming, non-casino gaming facilities in major metropolitan areas such as card rooms and traditional horseracing tracks, or outlying casinos that target urban populations.

THE DISTINCTION BETWEEN “URBAN GAMING” AND “OFF-RESERVATION GAMING”

Unfortunately, much of the debate surrounding “urban gaming” centers on “off-reservation gaming.” However, urban gaming is distinct and independent from off-reservation gaming.

“Off reservation gaming” is Indian gaming on land where a tribe has no geographic, cultural, or historical ties to the area where the casino is located² On the other hand, “urban gaming” is casino gaming in a large metropolitan area, as defined above. Both Indian and commercial gaming can be considered urban gaming.

A SURVEY OF EXISTING URBAN GAMING

In many cases, urban gaming is discussed as if it were a new phenomenon. However, in addition to casinos in Las Vegas, urban gaming has existed for over two decades in some urban areas across the country. Analysis Group’s survey of gaming jurisdictions revealed 19 metropolitan areas with existing or developing gaming, some of which were commercial and others of which were tribal.³

The survey set forth in this report provides various demographic data on the metropolitan areas along with data on nearby casino gaming. To the extent available, casino data include the number of casinos, casino opening dates, distances from the geographic center of the metropolitan areas, the number of gaming machines and table games, gross gaming revenue at the casinos, tax revenue

² This definition is based upon a bill recently introduced in the U.S. House of Representatives. Source: Common Sense Indian Gambling Reform Act, H.R. 2353 (proposed bill in U.S. House of Representatives, 109th Congress), May 12, 2005.

³ This list is not intended to be an exhaustive, but rather a survey of major urban gaming markets for which data were readily available.



generated for state/local governments, number of casino employees, and wages paid by the casinos.

Metropolitan Areas with Urban Gaming		
Metropolitan Area	Type of Gaming	# of Casinos
Albuquerque, New Mexico	Indian casinos	4
Chicago, Illinois	Riverboats	4
Detroit, Michigan	Land-based	3
Ft. Lauderdale, Florida	Indian casinos	3
Kansas City, Missouri	Riverboats	4
Milwaukee, Wisconsin	Indian casino	1
Minneapolis/St. Paul, Minnesota	Indian casino	1
Oakland/San Francisco, California	Indian casino	1
Oklahoma City, Oklahoma	Indian casinos	2
Philadelphia, Pennsylvania*	Racinos/land-based	at least 2
Pittsburgh, Pennsylvania*	Racinos/land-based	at least 1
Phoenix, Arizona	Indian casinos	4
Sacramento, California	Indian casino	1
San Bernardino/Riverside, California	Indian casino	1
San Diego, California	Indian casino	1
St. Louis, Missouri	Riverboats	5
Tampa, Florida	Indian casino	1
Tucson, Arizona	Indian casinos	3
Tulsa, Oklahoma	Indian casinos	4
* Indicates metropolitan areas in which casino gaming is planned but not yet operating as of the time of this study.		

URBAN GAMING IN CALIFORNIA

Urban gaming is nothing new in California. It has existed in the state since 1982, when the Sycuan Casino opened 19 miles from the geographic center of San Diego. Based upon the definition above, there are four metropolitan areas with existing or planned urban gaming: Oakland/San Francisco, Sacramento, San Bernardino/Riverside, and San Diego.

Urban Gaming in California					
Metropolitan Area	Casino Name	Open Date ¹	Distance ²	Machines ³	Tables ³
Oakland/ San Francisco	San Pablo Lytton Casino ⁴	2005	11/13	500	33
Sacramento	Thunder Valley Casino	2003	20	2,700	200
San Bernardino/ Riverside	San Manuel Bingo & Casino	1989	17/15	2,000	99
San Diego	Sycuan Resort & Casino	1982	19	2,000	69
Total				7,200	401
¹ Obtained from casinos and news sources. ² Straight line distances from city centers. When two cities are listed for the metropolitan area, the distances are from the cities that are identified in the name of the metropolitan area. Source: MapQuest (2005). ³ Casino City Press (2005) for all but machines at San Pablo Lytton Casino, which were provided by the casino. ⁴ San Pablo Lytton Casino is expected to add up to 500 more Class II gaming machines by August 2005.					



Oakland/San Francisco metropolitan area. The San Pablo Lytton Casino is located 11 miles from the geographic center of the Oakland metropolitan area, and 13 miles from geographic center of the San Francisco metropolitan area. Oakland is located in Alameda County, which has a population of 1.5 million. San Francisco is located in San Francisco County, which has a population of 744,230. The San Pablo Lytton Casino has been open for some years now as a cardroom that only offers poker and Californian/Asian style table games (e.g., Pai Gow poker and Pai Gow tiles), a type of gaming that would not otherwise be included in this survey. However, in 2003, the Lytton Band of Pomo Indians acquired the cardroom. In 2004, the federal government took the land into trust and the Tribe successfully negotiated a tribal-state gaming compact with Governor Schwarzenegger. While the compact provided for Class III slot machines, it was never ratified by the state legislature. Consequently, on August 1, 2005, the Tribe installed and began operating 500 Class II gaming machines, for which a gaming compact is not required. While less lucrative than Class III gaming machines, Class II machines have proven successful in many Indian casinos across the country. The Tribe is planning to add up to 500 more Class II gaming machines in the near future.

Sacramento metropolitan area. Thunder Valley Casino is located 20 miles from the geographic center of the Sacramento metropolitan area. It offers 2,700 slot machines and 200 table games. It is located in Sacramento County with a population of 1.4 million. It opened in 2003 and, with its location in an affluent metropolitan area, is considered to be one of the more successful Indian casinos in the country.

San Bernardino/Riverside metropolitan area. San Manuel Bingo & Casino is located 17 miles from the geographic center of the San Bernardino metropolitan area and 15 miles from the geographic center of the Riverside metropolitan area. It offers 2,000 slot machines and 99 table games. San Bernardino is located in San Bernardino County, which has a population of 1.9 million. Riverside is located in Riverside County, which also has a population of 1.9 million. San Manuel Bingo & Casino opened in 1989 and is also considered to be one of the more successful Indian casinos in the country.

San Diego metropolitan area. Sycuan Resort & Casino is located 19 miles from the geographic center of the San Diego metropolitan area. It offers 2,000 slot machines and 69 table games. It is located in San Diego County, which has a population of 2.9 million. There are also other nearby Indian casinos just beyond a 20-mile radius (e.g., Barona Valley Ranch Resort & Casino is 22 miles away). Sycuan Resort & Casino opened in 1982.

POTENTIAL BENEFITS OF URBAN GAMING

State and local governments have approved urban gaming in their communities for two primary reasons:



- 1) To provide a new revenue source for state, local, and tribal governments; and
- 2) To spur economic development, including jobs, wages, real estate investment, and tourism.

Evidence demonstrates that these benefits are actually being realized in metropolitan areas with urban gaming:

- Casinos in the Chicago metropolitan area generated \$313 million in gaming tax revenue to state and local governments in 2004.
- Detroit casinos employed 7,572 employees and generated \$279 million in gaming tax revenue to state and local governments in 2004.
- Casinos the Kansas City metropolitan area employed 5,124 employees, paid \$138 million in wages, and generated \$141 million in gaming tax revenues to state and local governments in 2004.
- Minnesota Indian casinos, including the one located in the Minneapolis/St. Paul metropolitan area, employed 13,339 workers and paid \$280 million in wages and benefits in 2000.
- Oklahoma Indian gaming facilities, including those in the Oklahoma City and Tulsa metropolitan areas, supported 3,857 jobs and \$43 million in wages in 2000.
- Arizona Indian casinos, including those in the Phoenix and Tucson metropolitan areas, employed 8,876 in 2001.
- Casinos in the St. Louis metropolitan area employed 6,363 employees, paid more than \$113 million in wages, and generated \$244 million in gaming tax revenue to state and local governments in 2004.

THE IMPACT OF GAMING ON TOURISM

Another important component of economic development in many gaming jurisdictions is tourism:

- Nationwide, a significant percentage of tourists participate in gambling activities during their trips - 7 percent of domestic tourists and 29 percent of international tourists.⁴
- Las Vegas visitors spent an average of \$777 per trip on lodging, food and drink, local transportation, shopping, shows, and sightseeing in 2004.

⁴ Domestic tourists are defined as visitors that travel 50 or more miles one-way from home or include an overnight stay or one or more nights. Source for percentage of domestic tourists that gamble: Travel Industry Association of America (2000). Source for percentage of international tourists that gamble: LA INC (2005), which sources the Office of Travel and Tourism in International Trade Administration of the U.S. Department of Commerce and CIC Research, Inc.



- Between the introduction of casinos in 1978 and 1996, the number of visitors to Atlantic City grew over 385 percent.
- In 2004, 78 percent of gaming revenue in Mississippi came from out-of-state tourists and 77 percent of casino patrons were from out of state.
- In Indiana, almost 75 percent of casino patrons came from outside Indiana.
- It was estimated that out-of-city residents would account for 91 percent of direct spending by all patrons during casino visits in Detroit.
- At Foxwoods Casino in Connecticut, 73 percent of patrons were out-of-state visitors in 1999/2000.
- In Oklahoma, Indian gaming facilities close to the border reported that about half to three-quarters of their customers were non-Oklahomans in 2000.
- In Massachusetts, residents spend approximately \$820 million annually at gaming facilities in Connecticut and Rhode Island since there is no casino gaming in Massachusetts.
- Starting in 1999, the Michigan Legislature licensed three urban casinos in Detroit, Michigan in order to attract tourists and recapture gaming dollars being spent by Michigan residents outside of the state in Windsor, Ontario.
- In 2004, the Pennsylvania Legislature licensed casino gaming in Philadelphia, Pittsburgh, and other urban areas in part to enhance tourism in those areas.



Table of Contents

Executive Summary	ii
1. Assignment.....	1
2. Background on Gaming in the U.S., California, and Los Angeles County	2
U.S. Casino Gaming Market.....	2
California Casino Gaming Market	3
Los Angeles County Casino Gaming Market	3
3. Urban Gaming.....	5
Defining “Urban Gaming”	5
The Distinction Between “Urban Gaming” and “Off-Reservation Gaming”	6
A Survey of Existing Urban Gaming	6
Potential Benefits of Urban Gaming	7
Casino Gaming and Tourism.....	7
4. Review of Urban Gaming Markets	11
Albuquerque, New Mexico	12
Chicago, Illinois	14
Detroit, Michigan.....	16
Ft. Lauderdale, Florida	18
Kansas City, Missouri	20
Milwaukee, Wisconsin.....	22
Minneapolis/St. Paul, Minnesota	24
Oakland/San Francisco, California	26
Oklahoma City, Oklahoma	28
Philadelphia and Pittsburgh, Pennsylvania	31
Phoenix, Arizona	34
Sacramento, California.....	37
San Bernardino/Riverside, California.....	38
San Diego, California	40
St. Louis, Missouri.....	42
Tampa, Florida.....	44
Tucson, Arizona.....	46
Tulsa, Oklahoma.....	48
5. References.....	51
6. Appendix A: About the Author	58
7. Appendix B: About Analysis Group, Inc.....	59



1. Assignment

Analysis Group was commissioned by the Gabrielino-Tongva Tribe (“Gabrielino Tribe”) to survey ongoing and developing gaming jurisdictions, identify whether urban gaming exists, and, where urban gaming does exist, provide background on those gaming markets and the metropolitan areas in which they are located. The list of urban gaming markets set forth in this report is not intended to be exhaustive, but rather a survey of the major jurisdictions for which data were readily available.

Background on Dr. Alan Meister, the primary author of this study, and Analysis Group are set forth in Appendices A and B, respectively.



2. Background on Gaming in the U.S., California, and Los Angeles County

In 2003, gaming was estimated to be a \$73 billion dollar industry in the United States.⁵ The industry encompasses a number of varied market segments all across the country, including:

- charitable gaming, such as bingo operated by charities;
- state-operated lotteries;
- pari-mutuel wagering, such as on horseraces, greyhound races, and jai alai;
- sports wagering;
- internet gambling;
- cardrooms; and
- casino gaming, such as in commercial land-based casinos, riverboats, racetrack casinos (i.e., racinos), and Indian casinos.

For the purposes of this report, we examined only casino gaming since it is the most prevalent form of gaming and what is being proposed by the Gabrielino Tribe in Los Angeles County. Casino gaming is generally used to describe all casinos, including land-based casinos, riverboats, and racinos, whether operated by commercial entities or Indian tribes. For the most part, casino gaming includes facilities that operate electronic gaming devices and table games. The only exceptions to this are racinos, which offer slot machines but typically not table games. Notable exclusions to the casino gaming market are cardrooms, which do not compete with respect to electronic gaming devices, and convenience gaming, which includes electronic gaming devices, but only at small facilities such as bars and restaurants.

U.S. CASINO GAMING MARKET

Nationwide, the largest gaming market segment by far is casino gaming. The casino gaming segment constitutes roughly two-thirds of the total U.S. gaming market.⁶ Casino gaming exists in traditional gaming destinations, such as Las Vegas, Atlantic City, Reno, and the Gulf Coast of Mississippi. But it also includes other newer and evolving gaming jurisdictions. This includes those that have Indian gaming, such

⁵ Measured by gross gaming revenue (i.e., amounts wagered minus payouts/prizes). Source: Christiansen Capital Advisors (2004).

⁶ Casino gaming percentage of total gaming estimated based on two different sources: Meister (2005b) for 2004 casino gaming data and Christiansen Capital Advisors (2004) for 2003 total gaming industry data.



Connecticut (Foxwoods and Mohegan Sun) and California. Currently, there are 37 states with casino gaming.⁷

CALIFORNIA CASINO GAMING MARKET

California offers all segments of the gaming industry, except sports wagering and internet gambling, which are both illegal in the state. However, casino gaming, which is represented by only Indian casinos, is by far the largest gaming market segment. It constitutes approximately 54 percent of total gaming revenue in California.⁸ As shown in Table 1, California, with \$5.3 billion in casino gaming revenue, ranks second only to Nevada among all states with casino gaming. As of 2004, California had 54 tribes operating 56 casinos.

State	Indian Gaming	Commercial Casinos	Racinos	Total Casino Gaming	% of Total
Nevada	\$51.6	\$10,562.2		\$10,613.8	21.2%
California	5,324.3			5,324.3	10.6
New Jersey		4,806.7		4,806.7	9.6
Mississippi**		2,776.9		2,776.9	5.5
Louisiana	372.7	1,882.1	\$281.0	2,535.7	5.1
Indiana		2,369.6		2,369.6	4.7
Connecticut	2,231.8			2,231.8	4.5
Michigan	971.0	1,189.3		2,160.2	4.3
Illinois		1,717.1		1,717.1	3.4
Arizona	1,533.7			1,533.7	3.1
Total*	\$19,037.3	\$28,308.1	\$2,772.8	\$50,118.2	100.0%

* Total includes 37 states with commercial casinos, racinos, or Indian casinos. Only the top 10 states are reproduced here.

** Only includes commercial casinos and/or racinos; excludes Indian gaming, which exists but is combined with other states to protect the confidential nature of the data.

Source: Meister, Alan. 2005. *Indian Gaming Industry Report, 2005-2006 Edition*. Newton: Casino City Press.

LOS ANGELES COUNTY CASINO GAMING MARKET

While Los Angeles County has some forms of gaming (e.g., charitable gaming, the lottery, pari-mutuel wagering on horse races, and cardrooms), it does not currently have casino gaming. The closest casino gaming to Los Angeles is at Indian casinos in San Bernardino, Riverside, and San Diego Counties. Specifically, the closest casino to downtown Los Angeles is approximately 70 miles away. The closest thing to

⁷ Meister (2005b).

⁸ California gaming revenue in 2004 was \$5.3 billion for Indian gaming, \$843 million for pari-mutuel wagering, \$3 billion for the lottery, and \$655 million for cardrooms. Sources: Meister (2005b); California Horse Racing Board (2004); California Lottery (2004); and Division of Gambling Control (2005).



casino gaming in Los Angeles County are cardrooms, of which there are eight.⁹ However, the cardrooms only offer poker and Californian/ Asian style table games (e.g., Pai Gow poker and Pai Gow tiles). They are prohibited from offering gaming machines.

⁹ For further detail on cardrooms in Los Angeles County and/or the Indian casinos in other nearby counties, please see: Meister (2005a).



3. Urban Gaming

DEFINING “URBAN GAMING”

The phrase “urban gaming” has been often used but rarely defined. In order to define “urban gaming,” it is first necessary to identify what is meant by an urban area. Given the national movement toward suburbanization, an “urban area” is defined as the central metropolitan area within a heavily-populated county.

To lend precision and practicality, this report defines “urban gaming” along three dimensions: the size of the urban area; the distance between the geographic center of the urban area and available gaming; and the type of gaming.

- Size of the urban area – In order to capture and limit the sprawling nature of 21st Century metropolitan areas, an urban area is identified as a large, primary city located within a county with total population over 500,000. Thus, only larger cities with sufficient population in the metropolitan area are captured as urban areas.
- Distance between the geographic center of the urban area and available gaming – In order to reflect varying sizes of metropolitan areas and restrict the inclusion of gaming facilities to those within reasonable driving distances, “urban gaming” includes only those urban areas with at least one gaming facility within a 20-mile radius. The 20-mile radius is measured as a straight-line distance from the geographic center of the primary city. The 20-mile radius reflects a conservative estimate of suburbanization in the metropolitan area and assures that the gaming facility is accessible to most residents of the urban area. The geographic center is a chosen point in the downtown area of the primary city, which often has high-rise office buildings or is otherwise viewed as the city center.
- Type of gaming – Only casino gaming (i.e., commercial casinos, racinos, or Indian casinos) is considered to be “urban gaming.” Casino gaming is the most prevalent form of gaming and what is being proposed by the Gabrielino Tribe in Los Angeles County. While other forms of gaming, such as lotteries, pari-mutuel wagering, and cardrooms, may exist in many urban areas, they are not included in our restrictive definition of “urban gaming.”

This definition is intended to be both comprehensive and well-suited to the practical facts of urban gaming around the nation. By defining urban gaming in a straight-forward and easy-to-understand manner, this survey reaches large cities with casino gaming, as well as large gaming facilities in metropolitan areas. However, it does not include many smaller cities with casino gaming, non-casino gaming facilities in major metropolitan areas such as card rooms and traditional horseracing tracks, or outlying casinos that target urban populations.



THE DISTINCTION BETWEEN “URBAN GAMING” AND “OFF-RESERVATION GAMING”

Urban gaming is distinct and independent from off-reservation gaming. Unfortunately, much of the debate surrounding “urban gaming” centers on “off-reservation gaming.”

“Off reservation gaming” is Indian gaming on land where a tribe has no geographic, cultural, or historical ties to the area where the casino is located.¹⁰ On the other hand, “urban gaming” is casino gaming in a large metropolitan area, as defined above. Both Indian and commercial gaming can be considered urban gaming.

A SURVEY OF EXISTING URBAN GAMING

In many cases, urban gaming is discussed as if it were a new phenomenon. However, in addition to casinos in Las Vegas, urban gaming has existed for over two decades in some urban areas across the country. Analysis Group, with the assistance of Foresight Companies, Inc., performed a cursory review of existing and developing gaming markets and found that urban gaming, as previously defined, exists in numerous places across the U.S. Nineteen urban gaming markets are presented in Section 4 of this study. This list is not intended to be an exhaustive, but rather a survey of major urban gaming markets for which data were readily available.

Traditional gaming destinations, such as Las Vegas, Atlantic City, and the Gulf Coast of Mississippi, are discussed in general but are not included. These traditional gaming markets are well established. Furthermore, gaming is a leading industry in these markets rather than one industry among several.

The survey of urban gaming, which is set forth in Section 4 of this report, provides various demographic data on the metropolitan areas along with data on casino gaming in those areas. To the extent available, casino data include the number of casinos, casino opening dates, distances from the geographic center of the metropolitan areas, the number of gaming machines and table games, gross gaming revenue at the casinos, tax revenue generated for state/local governments, number of casino employees, and wages paid by the casinos.

While the size, scope, and form of urban gaming has varied widely across gaming markets, there is one commonality across markets – casino gaming was introduced into urban areas in order to yield economic benefits to state, local, and/or tribal governments.

¹⁰ This definition is based upon a bill recently introduced in the U.S. House of Representatives. Source: Common Sense Indian Gambling Reform Act, H.R. 2353 (proposed bill in U.S. House of Representatives, 109th Congress), May 12, 2005.



POTENTIAL BENEFITS OF URBAN GAMING

State and local governments have approved urban gaming in their communities for two primary reasons:

- 1) To provide a new revenue source for state, local, and tribal governments; and
- 2) To spur economic development, including jobs, wages, real estate investment, and tourism.

These goals have been reiterated in many cases. For instance, in New Jersey, casino gaming was introduced to generate revenue, spark urban economic development, and rebuild Atlantic City.¹¹ In Mississippi, riverboat casinos were permitted in an effort to bring new jobs, investment, governmental revenues, and tourism to the state.¹² In Michigan, the introduction of commercial gaming was a calculated effort to increase government revenue, recapture Detroit residents' spending on out-of-state gaming, and increase tourism.¹³ In Pennsylvania, casino gaming is soon to be introduced in order to allow for wage tax cuts across the state, promote economic development, generate additional governmental revenues, strengthen the entertainment and tourism industries, and recapture gaming dollars currently leaving the state.¹⁴

CASINO GAMING AND TOURISM

As noted above, one of the reasons urban communities have introduced casino gaming is to promote tourism. Casino gaming has the potential to generate tourism if it can draw out-of-town visitors that might not otherwise have visited the area or motivate existing out-of-town visitors to stay longer. The likelihood of generating tourism is increased when demand for gaming is strong, the supply of other nearby gaming is limited, and other non-gaming amenities (e.g., lodging, restaurants, entertainment, shopping) are available in conjunction with gaming.

Fortunately for the casino gaming industry, demand currently remains high. Research shows that 81 percent of Americans find casino gaming to be an acceptable form of entertainment for themselves or others (54 percent find it acceptable for anyone, while 27 percent find it acceptable for others but not themselves personally).¹⁵ Furthermore, a significant percentage of tourists in the U.S. participate in gambling activities during their trips – 7 percent of domestic tourists (i.e., visitors that travel 50 or more miles one way from home or include an overnight

¹¹ New Jersey Casino Control Commission (1998).

¹² Harrison County Development Commission (2000).

¹³ Blue Ribbon Commission on Michigan Gaming (2002).

¹⁴ Philadelphia Gaming Advisory Task Force (2005).

¹⁵ American Gaming Association (2005).



stay of one or more nights) and 29 percent of international tourists.¹⁶ And as shown in Table 2, the percentage of domestic travelers that gamble is substantially higher for gaming destinations.

Table 2. Percentage of Domestic Tourists that Gamble	
Destination (MSA)	Gambling Participation Rate
Las Vegas, NV	73%
Reno, NV	66
Atlantic City, NJ	60
Gulfport-Biloxi, MS	59
Norwich-New London, CT ¹	47
Lake Charles, LA	46
Shreveport-Bossier City, LA	39
Davenport-Moline-Rock Island, IA	20
All Destinations	7%
¹ Home to Foxwoods Resort Casino and Mohegan Sun Casino. Source: Travel Industry Association of America (2000).	

In addition to strong demand for casino gaming, the industry yields the benefits of restricted and/or regionalized supply. The supply of casino gaming remains limited or nonexistent in many parts of the country due to regulatory, legislative, and legal barriers. And even when limited gaming options exist, they may be inferior forms of gaming (e.g., lottery, pari-mutuel wagering, cardrooms, Class II Indian gaming, and restricted Class III Indian gaming)¹⁷ such that they are not good substitutes for casino gaming. Therefore, in order to get the resort/destination casino experience, many gamblers must become tourists in the urban areas that offer it.

The movement towards adding more non-gaming amenities to casinos has also increased the potential to draw tourists. The trend has been particularly noticeable among Indian casinos across the country. Some tribes have been following the resort destination model and adding hotels, spas, restaurants, shopping plazas, and entertainment facilities to existing casinos, in addition to giving the casinos a

¹⁶ Source for percentage of domestic tourists that gamble: Travel Industry Association of America (2000). Source for percentage of international tourists that gamble: LA INC (2005), which sources the Office of Travel and Tourism in International Trade Administration of the U.S. Department of Commerce and CIC Research, Inc.

¹⁷ Class II gaming includes bingo, pulltabs, lotteries, punchboards, tip jars, instant bingo, other games similar to bingo, and certain non-house banked card games such as poker. The use of technological aids in conducting such games is permitted. Class III gaming includes slot machines, other video and electronic games of chance, craps, roulette, pari-mutuel wagering, and house-banked card games like blackjack. Source: Meister (2005b).



facelift.¹⁸ In fact, some Indian casinos, such as those in Connecticut and some in California, now rival traditional casino destinations.

Evidence from numerous casino gaming destinations has shown that strong demand, limited/restricted supply, and the offering of high-quality non-gaming amenities is generating or expected to generate tourism:

- With its glitz, glamour, limitless gaming options, and abundance of non-gaming amenities, Las Vegas is able to draw a large proportion of tourists who spend significant sums of money on non-gaming activities during casino visits. In 2004, Las Vegas visitors spent an average of \$777 per trip on lodging, food and drink, local transportation, shopping, shows, and sightseeing.¹⁹
- In Atlantic City, the casino gaming industry was introduced to generate revenue, increase jobs, spark urban economic development, and bring the tourism industry back to life. In 1978, when casinos were first introduced, Atlantic City had only a little over 7 million visitors. However, 5 years later in 1983, as the number of casinos increased and hotel rooms were added, the number of visitors to Atlantic City grew about 300 percent to over 26 million. And then 13 years later in 1996, the number had grown another 31 percent to over 34 million visitors per year.²⁰
- In Mississippi, gaming has provided an unprecedented level of economic development for the state. The introduction of gaming has helped fuel the most significant population and income growth in a century and has been referred to as the "*Mississippi Miracle*."²¹ Driving the positive outcome in Mississippi was the attraction of tourists. In fiscal year 2004, it is estimated that 78 percent of gaming revenue in the state came from tourists.²² Furthermore, 77 percent of casino patrons were from out of state.
- In Indiana, tourism was one of the reasons for legalizing riverboats. Survey evidence showed that the average distance traveled to the riverboat was 86 miles and that almost 75 percent of the patrons came from outside Indiana (64 percent were from Ohio). Furthermore, every survey respondent indicated that his or her primary purpose for visiting the city was to visit the riverboat casino.²³

¹⁸ Meister (2005b).

¹⁹ Per trip, visitors spent an average of \$295 on lodging (\$86.22 per night times 3.6 nights times 95% of visitors that stayed in hotel/motel), \$238 on food and drink, \$65 on local transportation, \$124 on shopping, \$47 on shows, and \$8 on sightseeing. Source: GLS Research, Inc. (2005).

²⁰ New Jersey Casino Control Commission (1998).

²¹ Harrison County Development Commission (2002).

²² Tourists were defined as persons making a 100-mile or more round trip. Source: Mississippi Development Authority, Tourism Division Research Unit (2005).

²³ The survey included 109 casino patrons to the Argosy Casino. Source: Klacik, D., et al. (2001).



- Detroit legalized commercial gaming in part to generate tourism and recapture gaming dollars being spent by Michigan residents outside of the state in Windsor, Ontario.²⁴ Prior to the opening of the casinos in 1999, it was estimated that 91 percent of direct spending during casino visits would come from out-of-city residents.²⁵
- In Connecticut, Foxwoods Casino and Mohegan Sun Casino have been able to attract tourism, including both daytrip and overnight visitors, despite not being in an urban area. In 1999/2000, 73 percent of Foxwoods' customers came from out-of-state. During trips, tourists were noted to spend money on gas, souvenirs, meals, and lodging in the region. Tourists were attracted not only by the gaming, but also by other entertainment and restaurants as well.²⁶
- In Minnesota, Indian casinos statewide have proven to be a tourist attraction. In 2000, about 17 percent of their patrons were from outside the state. Those visitors spent an estimated \$191.2 million on lodging, food, gas and other purchases on and off the reservation.²⁷
- In Oklahoma, Indian gaming facilities close to the border reported that about half to three-quarters of their customers were non-Oklahomans.²⁸
- In a study regarding the possibility of introducing Indian gaming in Massachusetts, it was estimated that Massachusetts residents were spending nearly \$820 million annually at facilities in both Connecticut and Rhode Island since there was no casino gaming in Massachusetts.²⁹
- In 2004, the Pennsylvania Legislature licensed casino gaming in Philadelphia, Pittsburgh, and other urban areas in part to enhance tourism in those areas.³⁰

²⁴ Blue Ribbon Commission on Michigan Gaming (2002).

²⁵ Deloitte & Touche, LLP (1997).

²⁶ Carstensen, et al. (2000).

²⁷ Minnesota Indian Gaming Association (2005).

²⁸ Grant, et al. (2004).

²⁹ Taylor, et al. (2002).

³⁰ Philadelphia Gaming Advisory Task Force (2005).



4. Review of Urban Gaming Markets

This section reviews existing and developing urban gaming markets across the U.S., including (in alphabetical order):

- 1) Albuquerque, New Mexico;
- 2) Chicago, Illinois;
- 3) Detroit, Michigan;
- 4) Ft. Lauderdale, Florida;
- 5) Kansas City, Missouri;
- 6) Milwaukee, Wisconsin;
- 7) Minneapolis/St. Paul, Minnesota;
- 8) Oakland/San Francisco, California
- 9) Oklahoma City, Oklahoma;
- 10) Philadelphia and Pittsburgh Pennsylvania (in development);
- 11) Phoenix, Arizona;
- 12) Sacramento, California;
- 13) San Bernardino/Riverside, California
- 14) San Diego, California
- 15) St. Louis, Missouri;
- 16) Tampa, Florida;
- 17) Tucson, Arizona; and
- 18) Tulsa, Oklahoma.

This list is not intended to be an exhaustive, but rather a survey of major urban gaming markets for which data were readily available.

For each market, we provide a brief description of the area, relevant demographic information, and facts and figures on gaming in the area. All information was gathered from publicly available sources, including gaming regulatory boards/commissions, existing studies of the gaming jurisdictions, and industry publications.



ALBUQUERQUE, NEW MEXICO

Albuquerque, which is one of the fastest-growing cities in the nation,³¹ has a population of 484,246.³² It is located in Bernalillo County, which covers 1,166 square miles.³³ The county has a population of approximately 593,765 and is the most populated county in New Mexico with approximately 31 percent of the population.³⁴ Furthermore, Bernalillo County is the largest county in New Mexico.³⁵ The median household income in Bernalillo County is \$38,788, which is above the state median income of \$34,133.³⁶

Bernalillo County attracts skiers, museum-goers, balloonists, hikers, bikers, and adventure-seekers. Leading industries in the state include aviation, aerospace, microelectronics, biomedical research, and manufacturing.³⁷

Albuquerque International Sunport is the largest commercial airport in New Mexico. In 2004, it handled over 6.3 million passengers.³⁸ This was a 5 percent increase from 2003 and more than double the volume 10 years ago.³⁹

The Bernalillo County area has many tourist attractions:

- amusement parks/zoo
 - Rio Grande Botanic Garden, Albuquerque Biological Park, Cliff's Amusement Park, Rio Grande Zoo, Wildlife West Nature Park, and Hinkle Family Fun Center
- concerts and performing arts
 - Albuquerque Little Theatre, AirDance, ArtSpace, New Mexico Symphony Orchestra, Journal Pavilion, Chamber Music Albuquerque, The Santa Fe Opera, The Cell Theatre, and Tricklock Performance Company
- landmarks
 - El Camino Real historic route, Route 66, Albuquerque International Balloon Fiesta, and Nob Hill
- museums

³¹ U.S. Census Bureau (2005e).

³² U.S. Census Bureau (2005a).

³³ U.S. Census Bureau (2005b).

³⁴ U.S. Census Bureau (2005c, 2005d).

³⁵ U.S. Census Bureau (2005d).

³⁶ U.S. Census Bureau (2005b).

³⁷ Albuquerque Economic Development (2005).

³⁸ Airports Council International (2004).

³⁹ Airports Council International (2004); City of Albuquerque (2005).



- Museum of National History and Science, Maxwell Museum of Anthropology, National Atomic Museum, Albuquerque Museum of Art and History, University of New Mexico Museums, Legends of New Mexico Museum, Indian Pueblo Cultural Center, National Hispanic Cultural Center, and Rattlesnake Museum
- shopping
 - Festival Marketplace, Bosque Farms Flea Market, Plaza Mercado, and Coronado Center
- universities
 - University of New Mexico and University of Phoenix-Albuquerque
- sports
 - Golfing, rafting, hiking, biking, horseback riding, and skiing
- American Indian culture
 - Nineteen Indian pueblos

There are four Indian casinos located within 20 miles of the center of the Albuquerque metropolitan area.

Table 3. Urban Casinos in Albuquerque, New Mexico				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Sandia Casino	Albuquerque, NM	13	1985	222,000
Laguna Route 66 Casino	Albuquerque, NM	11	2002	50,000
Santa Ana Star Casino	Santa Ana Pueblo, NM	17	1996	100,000
Isleta Casino and Resort	Albuquerque, NM	9	2001	100,000
Total				472,000
¹ Casino City Press (2005).				
² Straight line distances from city center, except for Laguna Route 66 and Santa Ana Star Casinos, which are driving distances. Source: MapQuest (2005).				
³ Obtained through state gaming board, casinos, and news sources.				

The casinos have a total of 472,000 square feet of gaming space with 5,698 gaming machines and 121 table games.⁴⁰ In calendar year 2004, the casinos generated \$349 million in gross Class III gaming machine revenue.⁴¹

⁴⁰ Casino City Press (2005).

⁴¹ Revenue from slot machines only.



Table 4. Key Statistics for Urban Casinos in Albuquerque, New Mexico			
Casino	# of Slot Machines¹	# of Tables¹	2004 Class III Machine Revenue²
Sandia Casino	1,748	47	\$133,481,396
Laguna Route 66 Casino	1,250	20	\$85,257,997
Santa Ana Star Casino	1,000	24	\$41,203,790
Isleta Casino and Resort	1,700	30	\$89,265,534
Total	5,698	121	\$349,208,717
¹ Casino City Press (2005).			
² New Mexico Gaming Control Board (2004a, 2004b, 2004c, 2005a).			

From all 13 New Mexico tribes with casinos, approximately \$29.3 million was provided to state and local governments as part of revenue sharing agreements whereby tribes contribute 3 to 8 percent of Class III net win (sliding scale based upon net win, which equals gross gaming revenue minus prizes/payouts). Total gaming revenue from all casino gaming in New Mexico, including all 19 Indian casinos as well as five non-Indian racinos, was \$858 million in calendar year 2004.⁴²

CHICAGO, ILLINOIS

With a population of 2.9 million people, Chicago is the third largest city in the U.S. behind New York City and Los Angeles and the largest inland city in the nation.⁴³ Chicago is located in Cook County, which has a population of 5.3 million and approximately 42 percent of the state population.⁴⁴ The county covers 946 square miles, 246 of which are the city of Chicago.⁴⁵ The median household income in the county is \$45,922, which is below the state median household income of \$46,590.⁴⁶

Chicago has a very strong tourism industry. In 2003, an estimated 30 million tourists spent \$500 million in Chicago.⁴⁷ The centralized location of the city, numerous venues, and world-class attractions continue to make Chicago one of the most popular tourist destinations in the country. Chicago is home to O'Hare International Airport, which is the largest commercial airport in Illinois and the second largest in the world. In 2004, it handled over 75.5 million passengers, a 9 percent increase from the previous year.⁴⁸

The Cook County area offers an abundance of tourist attractions:

⁴² Meister (2005b).

⁴³ U.S. Census Bureau (2005a).

⁴⁴ U.S. Census Bureau (2005c, 2005d).

⁴⁵ U.S. Census Bureau (2005b).

⁴⁶ U.S. Census Bureau (2005b).

⁴⁷ Chicago Convention and Tourism Bureau (2005).

⁴⁸ Airports Council International (2004).



- amusement parks/zoos
 - Millennium Park, Shedd Aquarium, Washington Park Refectory, Lincoln Park Zoo, and Six Flags Great America
- museums
 - Museum of Contemporary Art, Art Institute of Chicago, and Museum of Science and Industry
- landmarks
 - Navy Pier, Sears Tower, and Maxwell Street Market
- sports teams/events
 - White Sox and Cubs (MLB), Bulls (NBA), Bears (NFL), and Blackhawks (NHL)
- universities
 - University of Chicago, Northwestern University, and Loyola Chicago

Another nearby attraction is casino gaming. Participation in casino gaming by Chicago residents is 30 percent, which is above the average U.S. rate of 26 percent.⁴⁹ Chicago is also the third largest city in terms of the number of residents that gamble (New York and Los Angeles were first and second, respectively).

The Chicago metropolitan area is served by commercial riverboat casinos to the west of the city in Illinois and to the east of the city across the border in Indiana. For the purposes of this report, only the riverboats in Indiana are considered urban gaming because the Illinois riverboats are more than 20 miles from the center of the Chicago metropolitan area (range from roughly 35 to 45 miles away). The four Indiana riverboat casinos, Horseshoe Casino, Trump Casino Hotel, Majestic Star Casino, and Harrah's East Chicago Casino, are all within 20 miles of Chicago.

Table 5. Urban Casinos in Chicago, Illinois				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage^{1,4}
Horseshoe Casino	Hammond, IN	13	2001	42,573
Trump Casino	Gary, IN	20	1997	37,000
Majestic Star	Gary, IN	18	1996	43,000
Harrah's Casino	East Chicago, IN	17	2000	53,982
Total				176,555
¹ Casino City Press (2005). ² Straight line distances from city center. Source: MapQuest (2005). ³ Obtained through state gaming commission, casinos, or news search. ⁴ Harrah's Entertainment (2005) for Harrah's Casino.				

⁴⁹ Harrah's Entertainment, Inc. (2004).



In total, these urban casinos have 176,555 square feet of gaming space and offer 7,217 gaming machines and 221 table games. In fiscal year 2004, total gross gaming revenue for these four casinos was \$964 million and tax revenues were \$313 million. Gaming tax revenues are spent on education assistance and were also distributed to local governments.⁵⁰

Table 6. Key Statistics for Urban Casinos in Chicago, Illinois				
Casino	# of Slot Machines¹	# of Tables¹	2004 Revenue¹	2004 Tax Revenue¹
Horseshoe Casino	2,007	49	\$362,148,542	\$123,591,252
Trump Casino	1,717	56	\$143,812,551	\$41,081,245
Majestic Star	1,584	50	\$145,612,876	\$41,636,899
Harrah's Casino	1,909	66	\$312,667,849	\$106,546,804
Total	7,217	221	\$964,241,818	\$312,856,200
¹ Indiana Gaming Commission (2004).				

DETROIT, MICHIGAN

Detroit is the eleventh largest city in the U.S. with a population of 900,198.⁵¹ It is located in Wayne County, which has a population of approximately 2 million and represents approximately 20 percent of the state population.⁵² The county covers 614 square miles and has a median household income of \$40,776, which is below the state median household income of \$44,667.⁵³

Detroit is currently undergoing major renovations with particular emphasis on new developments and attractions. These developments include a park with an ice-skating rink, performance areas, and outdoor cafes.⁵⁴ As many as 150 special events a year are scheduled for Detroit's new green space, which was finished in 2004. Moreover, hundreds of millions of dollars have been poured into real estate and other commercial developments in the last several years.⁵⁵

Known internationally for its automobile manufacturing and trade, Detroit is the worldwide headquarters of General Motors and the North American headquarters of DaimlerChrysler and Volkswagen. Greater Detroit also ranks as a leader in the production of paints, non-electrical machinery, automation equipment, pharmaceuticals, rubber products, synthetic resins, and garden seed.

⁵⁰ American Gaming Association (2005).

⁵¹ U.S. Census Bureau (2005a).

⁵² U.S. Census Bureau (2005c, 2005d).

⁵³ U.S. Census Bureau (2005b).

⁵⁴ Detroit Visitor's Center (2005).

⁵⁵ Detroit Visitor's Center (2005).



Detroit Metro Airport is the largest airport in Michigan and the eleventh largest airport in North America. In 2004, it handled 35.2 million passengers, an 8 percent increase from the previous year.⁵⁶

There is an array of attractions offered in the Wayne County area:

- amusement parks/zoo
 - Great Escape Amusement Park, Belle Isle, Palmer Park, and River Rouge Park
- landmarks
 - The first mile of paved concrete road, the country’s first traffic light, the nation’s first urban freeway, and the largest flower-bedding market in the world
- sports teams/events
 - Pistons (NBA), Lions (NFL), Tigers (MLB), and Red Wings (NHL)
- community events
 - The Comerica TasteFest, North American International Autoshow, and Concert of Colors

Participation in casino gambling activities by residents of Detroit is about 32 percent, which was higher than the U.S. average of 26 percent.⁵⁷ Detroit was the top casino destination for residents of Cleveland and Columbus, Ohio, who had participation rates of 26 percent and 23 percent, respectively.⁵⁸

The Detroit metropolitan area has three commercial land-based casinos. Following approval by voters, the casinos began operating temporary facilities in 1999.

Table 7. Urban Casinos in Detroit, Michigan				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Greektown Casino	Detroit, MI	0	2000	75,000
MGM Grand Casino	Detroit, MI	0	1999	75,000
MotorCity Casino	Detroit, MI	0	1999	75,000
Total				225,000
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained through state gaming board.				

⁵⁶ Airports Council International (2004).

⁵⁷ Harrah’s Entertainment, Inc. (2004).

⁵⁸ Harrah’s Entertainment, Inc. (2004).



The casinos, which employ 7,572 employees, have a total of 225,000 square feet of gaming floor space with 7,810 gaming machines and 255 table games.⁵⁹ In calendar year 2004, they generated \$1.2 billion in gross gaming revenue and \$279 million in gaming tax revenue for state and local governments.⁶⁰

Casino	# of Slot Machines¹	# of Tables¹	2004 Revenue²	2004 Tax Revenue³	Employees³
Greektown Casino	2,411	87	\$319,887,389	N/A	N/A
MGM Grand Detroit Casino	2,778	80	\$433,269,430	N/A	N/A
MotorCity Casino	2,621	88	\$436,107,618	N/A	N/A
Total	7,810	255	\$1,189,264,437	\$279,399,000	7,527

¹ Casino City Press (2005).
² Michigan Gaming Control Board (2004).
³ The American Gaming Association (2005).

Gaming tax revenue in Detroit has been spent by the state/local government on public safety, capital improvements, youth programs, tax relief, neighborhood development and improvement, and infrastructure repair and improvement.⁶¹

FT. LAUDERDALE, FLORIDA

Ft. Lauderdale, with a population of 164,578, is located in Broward County with a geographic area of 1,205 square miles.⁶² Broward County has a population of approximately 1.8 million and is the second most populated county in Florida with approximately 10 percent of the population.⁶³ The median household income in Broward County is \$41,691, which is above the state median household income of \$38,819.⁶⁴

Once known strictly as a tourism-based economy, Fort Lauderdale now supports a diverse range of industries. These industries include marine, manufacturing, finance, insurance, real estate, high technology, avionics/aerospace, and film and television production.⁶⁵

In 2004, Broward County saw a 5 percent increase in tourism.⁶⁶ Ft. Lauderdale Hollywood International Airport, which is only the third largest airport in Florida, had 20.8 million passengers, a 16 percent increase from the previous year.⁶⁷

⁵⁹ Casino City Press (2005).

⁶⁰ American Gaming Association (2005).

⁶¹ American Gaming Association (2005).

⁶² U.S. Census Bureau (2005a, 2005b).

⁶³ U.S. Census Bureau (2005c, 2005d).

⁶⁴ U.S. Census Bureau (2005b).

⁶⁵ City of Fort Lauderdale, Florida (2005).

⁶⁶ Broward County, Florida, Office of Urban Planning and Redevelopment (2005).



Tourist attractions available in the area include:

- amusement parks/zoo
 - Billie Swamp Safari, Flamingo Gardens, and Sawgrass Recreation Park
- landmarks
 - Stranahan House
- concerts and performing arts
 - Riverwalk Arts and Entertainment District, Broward Center for the Performing Arts, Museum of Discovery and Science, and Florida Grand Opera
- museums
 - Museum of Art, Old Dillard Museum, and Old Fort Lauderdale Village and Museum
- shopping
 - Beach Place, Broward Mall, Las Olas Boulevard, and Las Olas Riverfront
- beaches
 - 23 miles of coastline

Participation in casino gambling by Miami/Ft. Lauderdale residents was somewhat low compared to other parts of the U.S. The participation rate was 19 percent, compared to the overall U.S. rate of 26 percent.⁶⁸

Three Indian casinos are located within 12 miles of the center of the Ft. Lauderdale metropolitan area – the newest one being the Seminole Hard Rock Hotel and Casino.

Table 9. Urban Casinos in Ft. Lauderdale, Florida				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Seminole Hard Rock - Hollywood	Hollywood, FL	9	2004	135,000
Seminole Coconut Creek Casino	Coconut Creek, FL	11	2000	30,000
Seminole Casino - Hollywood	Hollywood, FL	6	1982	73,000
Total				238,000
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained through state gaming board, casinos, or news search.				

⁶⁷ Airports Council International (2004).

⁶⁸ Harrah's Entertainment, Inc. (2004).



The casinos have a total of 238,000 square feet of gaming space with 3,791 gaming machines and 88 table games.⁶⁹

Table 10. Key Statistics for Urban Casinos in Ft. Lauderdale, Florida		
Casino	# of Slot Machines¹	# of Tables¹
Seminole Hard Rock Hotel and Casino Hollywood	2,100	48
Seminole Coconut Creek Casino	830	11
Seminole Casino – Hollywood	861	29
Total	3,791	88
¹ Casino City Press (2005).		

In 2004, all seven Indian casinos operated in Florida, including those near Ft. Lauderdale, generated total gross gaming revenue of \$862 million.⁷⁰

KANSAS CITY, MISSOURI

Kansas City, which is the largest city in Missouri, has a population of 444,387.⁷¹ It covers 314 square miles and spans across a couple counties.⁷² However, Jackson County, which covers 605 square miles,⁷³ contains the largest portion of Kansas City. With a population of 660,095, Jackson County represents approximately 9 percent of the state population.⁷⁴ The median household income of the county is \$39,277, which is above the state median household income of \$37,934.⁷⁵

Several major companies have their origins or headquarters in Kansas City. Among them are the Hallmark Cards, H&R Block, Inc., Russell Stover Candies, Pony Express, Kansas City Savings Association (now known as Commerce Bancshares, Inc.), American Century Companies, Inc., Wolferman's, Burns & McDonnell (Engineers-Architects-Consultants), and Hoechst-Marion-Rousell (formerly Marion Laboratories).⁷⁶

Kansas City International Airport is the second largest airport in Missouri having accommodated 10 million passengers in 2004, which was a 3 percent increase from 2003.⁷⁷ The Jackson County area offers a wide variety of attractions:

- amusement parks/zoos

⁶⁹ Casino City Press (2005).

⁷⁰ Meister (2005b).

⁷¹ U.S. Census Bureau (2005a).

⁷² U.S. Census Bureau (2005b).

⁷³ U.S. Census Bureau (2005b).

⁷⁴ U.S. Census Bureau (2005c, 2005d).

⁷⁵ U.S. Census Bureau (2005b).

⁷⁶ Kansas City Tourism (2005).

⁷⁷ Airports Council International (2004).



- Worlds of Fun, Oceans of Fun, KC Watersports, and Kansas City Zoo
- landmarks/historic sites
 - 1827 Log Courthouse, Black Archives of Mid-America, Inc., Battle of Lexington, and Oliver Anderson House
- concerts and performing arts
 - Starlight Theatre, Kansas City Symphony, Kansas City Repertory, The Lyric Opera, Kansas City Ballet, Verizon Wireless Amphitheater, and Coterie Theatre
- sports teams/events
 - Royals (MLB), Chiefs (NFL), and Kansas Speedway (NASCAR)
- special events
 - Kids Agriculture Learning Fest, Free Friday Night Flicks, Farm Heritage Days, Water Gardens Tour, and Antique & Craft Fair

There are four riverboat casinos within 10 miles of the center of the Kansas City metropolitan area.

Table 11. Urban Casinos in Kansas City, Missouri				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage⁴
Ameristar Casino - Kansas City	Kansas City, MO	6	1996	140,000
Isle of Capri Casino	Kansas City, MO	1	2001	45,300
Harrah's N. Kansas City	North Kansas City, MO	3	1996	60,100
Argosy Casino	Riverside, MO	4	1994	62,000
Total				307,400
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained through state gaming commission, casinos, and news sources.				
⁴ Missouri Gaming Commission (2004a).				

They offer 307,400 square feet of gaming space with 7,950 gaming machines and 231 table games.⁷⁸

⁷⁸ Casino City Press (2005).



Table 12. Key Statistics for Urban Casinos in Kansas City, Missouri

Casino	# of Slot Machines ¹	# of Tables ¹	2004 Revenue ¹	2004 Tax Revenue ¹	Employees ¹	2004 Wages ¹
Ameristar Casino	2,923	107	\$225,878,279	\$49,792,676	1,921	\$52,400,000
Isle of Capri Casino	1,543	31	\$100,432,130	\$22,275,980	715	\$19,800,000
Harrah's	1,734	47	\$199,332,830	\$42,590,021	1,456	\$42,000,000
Argosy Casino	1,750	46	\$124,111,486	\$26,624,690	1,032	\$23,800,000
Total	7,950	231	\$649,754,725	\$141,283,367	5,124	\$138,000,000

¹ Missouri Gaming Commission (2004a).

During fiscal year 2004, the casinos employed 5,124 employees and paid \$138 million in wages. The casinos also generated \$650 million in gross gaming revenue and \$141 million in gaming tax revenues for state and local governments.⁷⁹ Gaming tax revenue is spent on education, local public safety, treatment of problem gamblers, veteran's program, and early childhood programs.

MILWAUKEE, WISCONSIN

With a population of 583,624, Milwaukee is the largest city in Wisconsin and the 22nd largest city in the United States.⁸⁰ The city is located in Milwaukee County, which has a population of 928,018 and represents approximately 17 percent of the state population.⁸¹ The county covers 242 square miles and has a median household income of \$38,100, which is below the state median household income of \$43,791.⁸²

In recent years, Milwaukee has developed a reputation as a city of festivals.⁸³ Summerfest, an 11-day music festival held on its own lakefront grounds, is a showcase for acts ranging from alternative rock to country music. Milwaukee also hosts numerous smaller festivals celebrating various heritages.

Milwaukee is headquarters to Fortune 1000 manufacturers and service companies. Among these are Briggs & Stratton, Harley-Davidson, Johnson Controls, Manpower Inc., Marshall & Ilsley, Northwestern Mutual, Rockwell Automation, Roundy's, and Wisconsin Energy.⁸⁴

General Mitchell International Airport is the largest airport in Wisconsin with 6.7 million passengers in 2004. This was a 9 percent increase over 2003.⁸⁵

The Milwaukee County area offers a variety of local attractions:

⁷⁹ Missouri Gaming Commission (2004a).

⁸⁰ U.S. Census Bureau (2005a).

⁸¹ U.S. Census Bureau (2005c, 2005d).

⁸² U.S. Census Bureau (2005b).

⁸³ Wikipedia (2005).

⁸⁴ Wikipedia (2005).

⁸⁵ Airports Council International (2004).



- amusement parks/zoos
 - Whitnall Park and Milwaukee County Zoo
- landmarks
 - Miller Brewing Company and Captain Frederick Pabst Mansion
- concerts and performing arts
 - Florentine Opera, Milwaukee Symphony Orchestra, Milwaukee Ballet, Milwaukee Repertory Theatre, and Skylight Opera Theatre
- sports teams/events
 - Brewers (MLB) and Bucks (NBA)
- community events
 - Summerfest and various heritage festivals
- museums
 - Milwaukee Art Museum, Milwaukee Public Museum, and Charles Allis Art Museum

There is one Indian casino located one mile from the center of the Milwaukee metropolitan area.

Table 13. Urban Casinos in Milwaukee, Wisconsin				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Potawatomi Bingo Casino	Milwaukee, WI	1	2000	256,000
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained through the casino.				

It is an Indian land-based casino covering 256,000 square feet and offers 1,500 gaming machines and 42 table games.⁸⁶ As part of its gaming compact with the State of Wisconsin, the Forest County Potawatomi Community of Wisconsin, which operates the Potawatomi Bingo Casino, has entered into a revenue-sharing agreement.⁸⁷ While the gaming compact was renegotiated in 2003, it was later found to be invalid and is currently be renegotiated again. In the interim, the Tribe is making revenue-sharing payments according to that now invalid compact. For fiscal year 2005, the Tribe made a fixed annual payment of \$43.6 million.

⁸⁶ Casino City Press (2005).

⁸⁷ Meister (2005b).



Table 14. Key Statistics for Urban Casinos in Milwaukee, Wisconsin		
Casino	# of Slot Machines¹	# of Tables¹
Potawatomi Bingo Casino	1,500	42
¹ Casino City Press (2005).		

MINNEAPOLIS/ST. PAUL, MINNESOTA

Minneapolis and St. Paul, with populations of 373,943 and 276,963, respectively,⁸⁸ are commonly referred to as the Twin Cities. They are on opposite sides of the Mississippi River. Minneapolis is located in Hennepin County. The county has a population of 1.1 million and represents approximately 22 percent of the state population.⁸⁹ St. Paul is located in Ramsey County. The county has a population of 499,498 and includes 10 percent of the state’s population.⁹⁰ Hennepin and Ramsey Counties have median household incomes of \$51,711 and \$45,722.⁹¹ This places Hennepin County above and Ramsey County below the state median household income of \$47,111. The two counties cover a combined total of 713 square miles.⁹²

Minneapolis/St. Paul is home to the Mall of America, the largest mall in the United States, which receives over 40 million visitors each year.⁹³ Downtown Minneapolis is uniquely connected by a seven-mile walkway system.⁹⁴

Minneapolis/St. Paul is the center of one of the richest agricultural areas of the U.S. and is a regional hub of transportation, commerce, and finance. Several Fortune 500 corporations are located in Minneapolis/St. Paul and the surrounding area including General Mills and its Pillsbury and Green Giant subsidiaries, 3M, Target Corp., United Health Group, U.S. Bancorp, Ecolab Inc., and Medtronic.

Minneapolis-St. Paul International Airport is the largest airport in the Minnesota and the ninth largest airport in North America.⁹⁵ Over 36.7 million passengers came through the airport in 2004. This was an 11 percent increase over 2003.

The Minneapolis/St. Paul area offers an abundance of tourist attractions:

- amusement parks/zoos

⁸⁸ U.S. Census Bureau (2005a).

⁸⁹ U.S. Census Bureau (2005c, 2005d).

⁹⁰ U.S. Census Bureau (2005c, 2005d).

⁹¹ U.S. Census Bureau (2005b).

⁹² U.S. Census Bureau (2005b).

⁹³ Greater Minneapolis Convention & Visitors Association (2005).

⁹⁴ Greater Minneapolis Convention & Visitors Association (2005).

⁹⁵ Airports Council International (2004).



- Mill Ruins Par, Minnesota Zoo, and Underwater Adventures Aquarium
- landmarks
 - Stone Arch Bridge, Spoonbridge & Cherry, Landmark Center, and Saint Paul Hotel
- sports teams/events
 - Twins (MLB), Vikings (NFL), and Timberwolves (NBA)
- concerts and performing arts
 - The State, Orpheum, and Pantages Theatres, Minnesota Orchestra, and Minnesota Opera
- community events
 - Metris Uptown Art Fair, Minnesota Fringe Festival, Minneapolis Aquatennial, Hot Summer Jazz Festival, and Winter Carnival
- museums
 - Minneapolis Institute of Arts, Frederick R. Weisman Art Museum, Mill City Museum, and Walker Art Center
- shopping
 - Mall of America and Nicollet Mall

Participation in casino gambling activities in Minneapolis/St. Paul ranks among the highest in the country at 37 percent. Of 23 major U.S. markets, only San Diego, Los Angeles, and Phoenix had a participation rate higher than that of Minneapolis/St. Paul (41 percent and 40 percent, respectively). In addition to having a high gambling participation rate, Minneapolis/St. Paul residents also have a very high average number of casino visits per year. It was only second to San Diego (6.9 in Minneapolis/St. Paul; 7.6 in San Diego; 5.8 nationwide).⁹⁶

There is one Indian casino 20 miles away from the center of the Minneapolis/St. Paul metropolitan area.

Table 15. Urban Casinos in Minneapolis/St. Paul, Minnesota				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Mystic Lake Casino	Prior Lake, MN	20	1992	125,000
¹ Casino City Press (2005).				
² Straight line distance from city center. Source: MapQuest (2005).				
³ Obtained through casinos and news sources.				

⁹⁶ Harrah's Entertainment, Inc. (2004).



Mystic Lake Casino has 125,000 square feet of gaming space with 4,000 gaming machines and 88 table games.⁹⁷ Minnesota casinos have proven very effective in attracting tourists to the state. In 2000, tribal casinos attracted about 17 percent of their patrons from outside the state. Those out-of-state visitors spent an estimated \$191 million on lodging, food, gas, and other purchases.⁹⁸ In fiscal year 2000, the 31 Indian gaming operations (including small facilities) employed 13,339 workers and paid \$280 million in wages and benefits. Minnesota tribes also engage in revenue sharing with the State of Minnesota and local governments.⁹⁹ In 2004, the tribes paid a combined total of \$150,000 to the state for its administration of the gaming compacts. The tribes also made payments in lieu of taxes to local governments. Since 2000, revenue sharing with local governments has been approximately \$15.9 million per year.

Table 16. Key Statistics for Urban Casinos in Minneapolis/St. Paul, Minnesota		
Casino	# of Slot Machines¹	# of Tables¹
Mystic Lake Casino	4,000	88
¹ Casino City Press (2005).		

OAKLAND/SAN FRANCISCO, CALIFORNIA

Oakland and San Francisco have respective populations of 397,976 and 744,230.¹⁰⁰ Together, they make up a large portion of the Bay Area. Oakland is located in Alameda County, which covers 438 square miles. The county has a population of 1.5 million and includes 4.1 percent of the state population.¹⁰¹ San Francisco is the only city in San Francisco County. It covers 47 square miles and represents 2 percent of the state population.¹⁰² The counties' median incomes, \$55,946 and \$55,221, respectively, are above the state median income of \$47,493.¹⁰³

San Francisco is ranked among the top international cities by travelers and planners.¹⁰⁴ It also considered one of the country's most environmentally conscious cities.¹⁰⁵ Oakland contains 19 miles of coastline along the San Francisco Bay as well as more open space per capita than any other city in the Bay Area.¹⁰⁶

⁹⁷ Casino City Press (2005).

⁹⁸ Minnesota Indian Gaming Association (2005).

⁹⁹ Meister (2005b).

¹⁰⁰ U.S. Census Bureau (2005a).

¹⁰¹ U.S. Census Bureau (2005b, 2005c, 2005d).

¹⁰² U.S. Census Bureau (2005b, 2005c, 2005d).

¹⁰³ U.S. Census Bureau (2005b).

¹⁰⁴ San Francisco Convention and Visitors Bureau (2005a).

¹⁰⁵ San Francisco Convention and Visitors Bureau (2005b).

¹⁰⁶ Oakland Convention and Visitors Bureau (2005).



In 2004, San Francisco had 15.1 million visitors, an increase of 6 percent over 2003.¹⁰⁷ They spent \$6.7 billion during their stays, which was a one-year increase of 7 percent. Hotel taxes were \$138 million for the county.¹⁰⁸

Oakland International Airport is the fourth largest airport in the state with a passenger volume of 14.1 million in 2004.¹⁰⁹ This was, a 4 percent increase over the previous year. San Francisco International Airport is the second largest airport in the state with a passenger volume of 32.2 million. This was a 10 percent increase from 2003.

The most popular tourist attractions in Oakland/San Francisco include:

- amusement parks/zooos
 - Lakeside Park, San Francisco Zoo, Paramount's Great America, and Golden Gate Park
- landmarks
 - Grand Lake Theatre, Old Oakland, Alcatraz Island, and Fisherman's Wharf
- museums and the arts
 - Oakland Museum of California, San Francisco Museum of Modern Art, SomArts Cultural Center, San Francisco Ballet, and Post Street Theatre
- sports teams/events
 - Oakland Athletics (MLB), San Francisco Giants (MLB), Oakland Raiders (NFL), San Francisco 49ers (NFL), and Golden State Warriors (NBA)
- colleges and universities
 - University of San Francisco, University of California at San Francisco, San Francisco State University, and Academy of Art College

The casino participation rate in 2003 for the Oakland/San Francisco region was 33 percent.¹¹⁰ This was higher than the overall U.S. participation rate of 26 percent. Among the 23 major U.S. markets, the region ranked fourth in the number of casino gamblers behind only New York City, Los Angeles, and Philadelphia.

There is one Indian casino in the Oakland/San Francisco metropolitan area, the San Pablo Lytton Casino, which is located 11 miles from Oakland and 13 miles from San

¹⁰⁷ San Francisco Convention and Visitors Bureau (2005c).

¹⁰⁸ San Francisco Convention and Visitors Bureau (2005d).

¹⁰⁹ Airports Council International (2004).

¹¹⁰ Harrah's Entertainment, Inc. (2004).



Francisco. On August 1, 2005, the casino installed and began operating 500 Class II gaming machines, for which a tribal-state gaming compact is not required.¹¹¹ These machines complement the table games that were already available.

Table 17. Urban Casinos in Oakland/San Francisco, California				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
San Pablo Lytton Casino	San Pablo, CA	11/13	2005	342,000
¹ Casino City Press (2005). ² Straight line distances from city centers of Oakland and San Francisco, respectively. Source: MapQuest (2005). ³ Obtained through state gaming board, casinos, and news sources.				

While less lucrative than Class III gaming machines (i.e., Las Vegas style slot machines), Class II machines have proven successful in many Indian casinos across the country. The casino is planning to add up to 500 more Class II gaming machines in the near future. Prior to installing the Class II machines, the San Pablo Lytton Casino only operated table games.¹¹²

Table 18. Key Statistics for Urban Casinos in Oakland/San Francisco, California		
Casino	# of Slot Machines¹	# of Tables²
San Pablo Lytton Casino	500	33
¹ San Pablo Lytton Casino. ² Casino City Press (2005).		

OKLAHOMA CITY, OKLAHOMA

Oklahoma City, which covers 607 square miles,¹¹³ is the third largest U.S. city in terms of land area.¹¹⁴ It has a population of 528,042 and is located in Oklahoma County, which has a population of approximately 680,815.¹¹⁵ Oklahoma County has the largest population of any county in Oklahoma (19 percent of the population).¹¹⁶ Oklahoma County also is one of the 100 largest counties in the U.S.¹¹⁷ The median household income of the county is \$35,063, which is above the state median household income of \$33,400.¹¹⁸

¹¹¹ San Pablo Lytton Casino.

¹¹² Richman (2005).

¹¹³ U.S. Census Bureau (2005b).

¹¹⁴ Wikipedia (2005).

¹¹⁵ U.S. Census Bureau (2005a, 2005d).

¹¹⁶ U.S. Census Bureau (2005c, 2005d).

¹¹⁷ U.S. Census Bureau (2005d).

¹¹⁸ U.S. Census Bureau (2005b).



In 2004, *Forbes* magazine ranked Oklahoma City ranked fourth in the category of “Cost of Doing Business” on its list of “Best Places for Business.”¹¹⁹ Leading industries in the county are retail trade, manufacturing, and finance and insurance. In terms of tourism, Oklahoma County led all Oklahoma counties in 2004, with \$1.3 billion in domestic tourist spending.¹²⁰

Will Rogers World Airport is the largest airport in Oklahoma having accommodated 3.4 million passengers in 2004, which was a 4 percent increase from 2003.¹²¹

The Oklahoma County area offers a variety of attractions:

- amusement parks/zoos
 - Myriad Botanical Gardens, Remington Park, Oklahoma City Zoo, Frontier City Theme Park, and White Water Bay
- landmarks
 - Bricktown
- concerts and performing arts
 - Oklahoma City Philharmonic Orchestra, Oklahoma Opera and Music Theatre, and Ballet Oklahoma
- museums
 - Oklahoma City Museum of Art and National Cowboy and Western Heritage Museum
- shopping
 - Western Avenue, Bricktown, Stockyards City, and Paseo Arts District

Participation in casino gambling by Oklahoma City residents was much lower than other parts of the U.S. The participation rate was 14 percent compared to the overall U.S. rate of 26 percent.¹²²

There are two Indian casinos located within 20 miles of the center of the Oklahoma City metropolitan area.

¹¹⁹ Business Facilities Online (2005).

¹²⁰ Oklahoma Tourism and Recreation Department (2003).

¹²¹ Airports Council International (2004).

¹²² Harrah’s Entertainment, Inc. (2004).



Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Newcastle Gaming Center	Newcastle, OK	19	N/A	47,000
Lucky Star Casino - Concho	Concho, OK	10	1994	40,000
Total				87,000
¹ Casino City Press (2005).				
² Straight line distances from city center; except for Newcastle Gaming Center, which is a driving distance. Source: MapQuest (2005).				
³ Obtained from casinos and news sources.				

The casinos have a total of 87,000 square feet of gaming space with 1,550 gaming machines and 38 table games.¹²³ In 2000, Indian gaming facilities statewide supported 3,857 jobs and \$43 million in wages.¹²⁴ These numbers are surely to have grown given the enormous growth of Oklahoma Indian gaming over the last couple years. Per new gaming compacts, Oklahoma tribes are able to offer some Class III gaming, including non-house banked blackjack and poker (i.e., players pay a fee per hand and play against each other, not the house), as well as previously unauthorized machine games, such as video poker.¹²⁵ As part of these compacts, the tribes have entered into revenue sharing agreements with the state. Under these agreements, the tribes pay the state 10 percent of the first \$30 million of adjusted gross revenue from the newly authorized games, 15 percent of adjusted gross revenue between \$30 million and \$40 million, 20 percent of adjusted gross revenue between \$40 million and \$50 million, 25 percent of adjusted gross revenue between \$50 million and \$70 million, and 30 percent of adjusted gross revenue over \$70 million. For only February through April 2005, revenue sharing payments totaled \$853 million.

Casino	# of Slot Machines¹	# of Tables¹
Newcastle Gaming Center	1,150	14
Lucky Star Casino - Concho	400	24
Total	1,550	38
¹ Casino City Press (2005); Analysis Group research.		

In 2005, Indian gaming in Oklahoma expanded to include poker and blackjack, which were not previously allowed. This is spurring further growth of Oklahoma gaming.

¹²³ Casino City Press (2005).

¹²⁴ Grant, et al. (2004).

¹²⁵ State of Oklahoma, Office of State Finance.



PHILADELPHIA AND PITTSBURGH, PENNSYLVANIA

Philadelphia

Philadelphia, which constitutes the entirety of Philadelphia County, is the largest city in Pennsylvania with a population of 1.5 million.¹²⁶ It is the most populated county in Pennsylvania with approximately 12 percent of the state population.¹²⁷

Philadelphia County also is among the 25 largest counties in the country. The county covers 135 square miles and has a median household income of \$30,746, which is below the state median household income of \$40,106.¹²⁸

Recently, Philadelphia has seen a significant increase in tourism. In 2003, the number of visitors increased 12 percent from approximately 21.7 million to 24.7 million and spending by visitors increased 19.6 percent from approximately \$5.3 billion to \$6.3 billion.¹²⁹ Other leading industries in Philadelphia County include manufacturing, refining, food, and financial services.¹³⁰

Philadelphia International Airport is the largest airport in Pennsylvania and the 18th busiest airport in North America.¹³¹ It accommodated 28.5 million passengers in 2004, which was a 16 percent increase from 2003.¹³² The Philadelphia County area offers an assortment of tourist attractions:

- amusement parks/zooos
 - Philadelphia Zoo
- landmarks
 - William Penn's House, Liberty Bell, Independence Hall, Independent National Historic Park, Betsy Ross House, Congress Hall, Declaration House, Edgar Allan Poe National Historic Site, and Old City Hall
- concerts and performing arts
 - Academy of Music, Kimmel Center, Mann Center for the Performing Arts, Pennsylvania Ballet, Opera Company of Philadelphia, Pennsylvania Theatre Company, Academy of Vocal Arts, Chamber Orchestra of Philadelphia, and Philadelphia Orchestra
- museums

¹²⁶ U.S. Census Bureau (2005a).

¹²⁷ U.S. Census Bureau (2005c, 2005d).

¹²⁸ U.S. Census Bureau (2005b).

¹²⁹ Greater Philadelphia Tourism Marketing Corporation (2004).

¹³⁰ Wikipedia (2005).

¹³¹ Philadelphia International Airport (2005).

¹³² Airports Council International (2004).



- Independent Seaport Museum, Atwater Kent Museum of Philadelphia, and National Liberty Museum
- shopping
 - Historic District and Waterfront
- sports teams/events
 - Phillies (MLB), Eagles (NFL), 76ers (NBA), and Flyers (NHL)
- universities
 - University of Pennsylvania, LaSalle University, Thomas Jefferson University, and Temple University

Participation in casino gambling by Philadelphia residents was somewhat high compared to other parts of the U.S. It was of 33 percent compared to the overall U.S. rate is 26 percent.¹³³ Philadelphia residents also participate in casino gaming quite frequently. They tied for the third highest number of annual visits per person among 23 major cities with 6.2 visits per year. The most frequently visited gaming jurisdiction is Atlantic City.

Pittsburgh

Pittsburgh has a population of 322,450 and is located in Allegheny County.¹³⁴ The county has a geographic area of 730 square miles has a population of approximately 1.3 million.¹³⁵ This makes it the second most populated county in Pennsylvania with approximately 10 percent of the population.¹³⁶ The median household income in Allegheny County is \$38,329, which although much higher than Philadelphia, is still below the state median household income.¹³⁷

Best known for its steel manufacturing and heavy industry, Pittsburgh's leading industries today include high technology, robotics, health care, biomedical technology, finance, and service-based fields.¹³⁸ Pittsburgh has been ranked seventh in the nation in terms of Fortune 500 headquarters. Located there are USX, ALCOA, Heinz, and PPG Industries. It was also ranked as one of the best places in the country for small businesses by *Inc.* magazine.¹³⁹

Travel is a \$2.2 billion industry in Pittsburgh.¹⁴⁰ It receives approximately 3.9 million visitors annually and provides more than 35,000 jobs. Pittsburgh

¹³³ Harrah's Entertainment, Inc. (2004).

¹³⁴ U.S. Census Bureau (2005a).

¹³⁵ U.S. Census Bureau (2005b, 2005d).

¹³⁶ U.S. Census Bureau (2005c, 2005d).

¹³⁷ U.S. Census Bureau (2005b).

¹³⁸ Wikipedia (2005).

¹³⁹ Greater Pittsburgh Convention and Center Bureau (2005a).

¹⁴⁰ About.com (2005).



International Airport is the second largest airport in Pennsylvania (next to Philadelphia International Airport) with 13.3 million passengers in 2004.¹⁴¹ It has been ranked the best airport in the U.S. by JD Power & Associates.¹⁴²

The Allegheny County area offers an assortment of attractions:

- amusement parks/zoos
 - Point State Park, Pittsburgh Zoo and Aquarium, Kennywood Amusement Park, Sandcastle Water Park, and Allegheny Riverfront Park
- landmarks
 - Pittsburgh Central Downtown Historic District, Allegheny County Courthouse and Jailhouse, and Fallingwater
- concerts and performing arts
 - Public Theater, Pittsburgh Ballet Theater, Pittsburgh Opera, Civic Light Opera, and the Pittsburgh Symphony
- museums
 - Andy Warhol Museum, Carnegie Museum of Art, Carnegie Museum of National History, Pittsburgh Regional History Center, Carnegie Science Center, and Pittsburgh Children's Museum
- shopping
 - Downtown Pittsburgh shopping district, Shadyside, Strip District, Lawrenceville, and Station Square
- sports teams/events
 - Pirates (MLB), Steelers (NFL), and Penguins (NHL)
- universities
 - Carnegie Mellon University and University of Pittsburgh

Participation in casino gambling by Pittsburgh residents was quite low compared to other parts of the country. It was 16 percent compared to the overall U.S. rate is 26 percent.¹⁴³

¹⁴¹ Airports Council International (2004).

¹⁴² Greater Pittsburgh Convention and Center Bureau (2005a).

¹⁴³ Harrah's Entertainment, Inc. (2004).



Statewide

The Pennsylvania Race Horse Development and Gaming Act, which was enacted on July 4, 2004, authorized 14 slots-only gaming facilities.¹⁴⁴ Gaming is being introduced by the state in order to:

- generate revenue to support property tax relief, wage tax reductions, and economic development;
- positively assist the state's horseracing industry; and
- enhance the development of tourism.

In addition, the City of Philadelphia sees gaming as a means to:

- create jobs; and
- recapture gaming dollars leaving the local economies.¹⁴⁵

Seven of the gaming facilities will be existing licensed racetrack facilities, which initially may have up to 3,000 slot machines and potentially a total of 5,000 slot machines after six months of operation.¹⁴⁶ Another seven will be non-licensed racetrack facilities, two of which are reserved for established resort hotels. The resort hotels may have up to 500 slot machines, while the other non-licensed racetracks may have the same number of machines as the licensed racetracks. The first racinos are expected to open in 2006 and the stand-alone casinos are expected to open in 2007.¹⁴⁷

While the precise locations of the gaming facilities is yet to be determined, it is expected that at least two facilities will be located in Philadelphia and at least one will be located in Pittsburgh. Philadelphia and Pittsburgh have each created a Gaming Task Force to assist in determining potential locations for gaming facilities.

PHOENIX, ARIZONA

Phoenix is the capital and most populated city in Arizona. With a population of 1.4 million, it is also the 6th largest city in the United States.¹⁴⁸ It is located in Maricopa County, which has a population of 3.5 million.¹⁴⁹ The county is the largest in the state with approximately 60 percent of the state population and covers 9,203 square miles.¹⁵⁰ Maricopa County is also the fourth most populated county in the nation.

¹⁴⁴ General Assembly of Pennsylvania (2004).

¹⁴⁵ Philadelphia Gaming Advisory Task Force (2005).

¹⁴⁶ General Assembly of Pennsylvania (2004).

¹⁴⁷ Philadelphia Gaming Advisory Task Force (2005).

¹⁴⁸ U.S. Census Bureau (2005a).

¹⁴⁹ U.S. Census Bureau (2005d).

¹⁵⁰ U.S. Census Bureau (2005c, 2005d, 2005b).



The median household income in Maricopa County is \$45,358, which is well above the state median household income of \$40,558.¹⁵¹

Phoenix ranks as one of the fastest-growing cities in the nation (the fastest for cities with populations over 1 million).¹⁵² Formerly an agricultural economy, Phoenix has diversified to include technology and telecommunications industries.¹⁵³ The state government and Arizona State University also provide a large number of jobs. Companies headquartered in Phoenix include America West Airlines, Best Western, and Petsmart.

Phoenix Sky Harbor International Airport is the largest airport in Arizona and the seventh largest airport in North America.¹⁵⁴ The airport had approximately 39.5 million passengers in 2004, a 6 percent increase from the previous year.

With its good weather, Maricopa County, especially Phoenix, has become a tourist destination. Tourist attractions include:

- amusement parks/zoo/outdoor activities
 - Phoenix Zoo, Pueblo Grande Museum and Cultural Park, Papago Park, and South Mountain Park/Reserve
- landmarks
 - Grand Canyon
- sports teams/events
 - Diamondbacks (MLB), Cardinals (NFL), Suns (NBA), and Coyotes (NHL)
- community events
 - Arizona Rodeo, Annual County Fair, and Cowboy Artists of America Sale & Exhibition
- museums
 - Heard Museum and Phoenix Art Museum

Participation in casino gambling by Phoenix residents was very high compared to other parts of the U.S. It was 39 percent compared to the overall U.S. rate of 26 percent.¹⁵⁵ In fact, it was the third highest participation rate among 23 major cities.

¹⁵¹ U.S. Census Bureau (2005b).

¹⁵² U.S. Census Bureau (2005e).

¹⁵³ Wikipedia (2005).

¹⁵⁴ Airports Council International (2004).

¹⁵⁵ Harrah's Entertainment, Inc. (2004).



Phoenix has some of the most accessible urban gaming in the country. Phoenix has several reservations that directly border the greater metropolitan area. There are four Indian casinos within 20 miles of the center of the Phoenix metropolitan area.

Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Casino Arizona at Salt River	Scottsdale, AZ	11	1998	100,000
Casino Arizona at Talking Stick	Scottsdale, AZ	20	1999	30,000
Gila River Casino - Lone Butte	Chandler, AZ	12	2002	N/A
Gila River Casino - Vee Quiva	Laveen, AZ	12	1997	116,700
Total				246,700

¹ Casino City Press (2005).
² Straight line distances from city center; except for Casino Arizona at Talking Stick and Gila River Casino-Vee Quiva, which are driving distances. Source: MapQuest (2005).
³ Obtained from state department of gaming.

These casinos have a total of approximately 246,700 square feet of gaming space and offer a total of 2,655 gaming machines and 155 table games.¹⁵⁶

Casino	# of Slot Machines¹	# of Tables¹
Casino Arizona at Salt River	998	50
Casino Arizona at Talking Stick	532	81
Gila River Casino - Lone Butte	450	4
Gila River Casino - Vee Quiva	675	20
Total	2,655	155

¹ Arizona Department of Gaming (2005).

In 2001, the Indian casinos in Arizona, including the four near Phoenix, employed a total of 8,876 workers.¹⁵⁷ As part of their gaming compacts with the state, Arizona tribes have entered into revenue-sharing agreements, whereby the tribes contribute 1 to 8 percent of Class III net win (sliding scale based upon amount of net win) to state and local governments.¹⁵⁸ For calendar year 2004, the tribes contributed a total of \$70.4 million.

¹⁵⁶ Casino City Press (2005).

¹⁵⁷ Cornell and Taylor (2001).

¹⁵⁸ Meister (2005b).



SACRAMENTO, CALIFORNIA

Sacramento is the capitol of California. It has a population of 454,330 and is one of the fastest-growing cities in the nation.¹⁵⁹ It is also the seventh largest city in the state. It is located in Sacramento County, which has a population of 1.4 million and represents approximately 4 percent of the state population.¹⁶⁰ The median household income in Sacramento County is \$43,816, which is below the state median household income of \$47,493.¹⁶¹

Sacramento serves as a major regional agricultural center.¹⁶² Surrounding Sacramento are some of the richest farmlands in the nation. Most of the area's nonagricultural labor force works in service industries and the manufacturing of processed foods, transportation equipment, chemicals, and electronic equipment. The largest employers are the federal, state, and local governments. Sacramento is also known for its public art. There are more than 100 galleries in the area.

Sacramento International Airport, the sixth largest airport in California, had a passenger volume of 9.6 million in 2004, an increase of 9 percent from the previous year.¹⁶³

The Sacramento area offers a number of attractions:

- amusement parks/zoos
 - Old Sacramento State Historic Park, William Land Park, and Waterworld USA Cal Expo
- sports teams/events
 - Kings (NBA)
- landmarks
 - Governor's Mansion
- community events
 - California State Fair and Sacramento Jazz Jubilee
- museums
 - California State Railroad Museum and Crocker Art Museum

There is one Indian casino, Thunder Valley Casino, near Sacramento. It is located approximately 20 miles from the center of the Sacramento metropolitan area.

¹⁵⁹ U.S. Census Bureau (2005a, 2005e).

¹⁶⁰ U.S. Census Bureau (2005c, 2005d).

¹⁶¹ U.S. Census Bureau (2005b).

¹⁶² MSN Encarta (2005b).

¹⁶³ Airports Council International (2004).



Table 23. Urban Casinos in Sacramento, California				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage
Thunder Valley Casino	Lincoln, CA	20	2003	N/A
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained from news sources.				

The casino has 2,700 gaming machines and 200 table games.¹⁶⁴ As part of their gaming compact with the state, the United Auburn Indian Community, which operates the Thunder Valley Casino, has entered into a revenue-sharing agreement.¹⁶⁵ The agreement includes three components: (a) revenue sharing with non-gaming tribes in the state, which is a fixed amount of \$2 million per year; (b) revenue sharing with the state for *additional* gaming machines authorized by the new compact (i.e., number of machines over 1,906), which is based upon a fixed fee per additional gaming machine; and (c) annual revenue sharing payments to the state, which are fixed payments of \$33.8 million per year for the first 18 years and at least 10 percent of adjusted gaming machine net win (i.e., gross revenue minus prizes/payouts and participation fees) thereafter.¹⁶⁶

Table 24. Key Statistics for Urban Casinos in Sacramento, California		
Casino	# of Slot Machines¹	# of Tables¹
Thunder Valley Casino	2,700	200
¹ Casino City Press (2005).		

SAN BERNARDINO/RIVERSIDE, CALIFORNIA

San Bernardino and Riverside have populations of 198,406 and 288,382, respectively.¹⁶⁷ San Bernardino is located in San Bernardino County, which has a population of 1.9 million, or 5 percent of the state population.¹⁶⁸ It has a total land area of 20,052 square miles.¹⁶⁹ Riverside is located in Riverside County, which also has a population of 1.9 million, or 5 percent of the state population.¹⁷⁰ The county covers an area of 7,207 square miles.¹⁷¹ San Bernardino and Riverside's respective

¹⁶⁴ Casino City Press (2005).

¹⁶⁵ Meister (2005b).

¹⁶⁶ State of California (2004).

¹⁶⁷ U.S. Census Bureau (2005a).

¹⁶⁸ U.S. Census Bureau (2005c, 2005d).

¹⁶⁹ U.S. Census Bureau (2005b).

¹⁷⁰ U.S. Census Bureau (2005c, 2005d).

¹⁷¹ U.S. Census Bureau (2005b).



county median incomes of \$42,066 and \$42,887 fall below the state median of \$47,493.¹⁷²

Between 1980 and 1990, Riverside County grew 76 percent, making it the fastest growing county in California during that period.¹⁷³ In addition, San Bernardino and Riverside share borders with Orange, Los Angeles, and San Diego Counties, which have very densely populated communities.

San Bernardino/Riverside is situated near many of Southern California's beaches, deserts, and mountain resorts, allowing visitors to participate in winter and warm weather activities.¹⁷⁴ Visitors also enjoy the region's large number of shopping malls and outlet centers.¹⁷⁵ San Bernardino/Riverside's leading industries include services, retail trade, and government.¹⁷⁶

San Bernardino/Riverside's major airport is Ontario International Airport.¹⁷⁷ It is the eighth largest airport in the state with a passenger volume of 6.9 million in 2004, a 6 percent increase over 2003.

Some of the area's leading tourist attractions are:

- outdoor recreation
 - Lake Gregory, Prado Park, Mojave Narrows Regional Park, Lake Arrowhead, and Big Bear Lake
- landmarks
 - Lincoln Memorial Shrine, Asistencia Mission of San Gabriel, Downtown Riverside, Mission Inn Hotel, and Heritage House
- museums
 - Robert V. Fullerton Museum, Agua Mansa Museum, Lake Arrowhead Children's Museum, San Bernardino Museum, and Redlands Historical Glass Museum
- colleges and universities
 - California State University at San Bernardino, University of California at Riverside, and University of Redlands

There is one Indian casino, San Manuel Bingo & Casino, located 17 miles from San Bernardino and 15 miles from Riverside.

¹⁷² U.S. Census Bureau (2005b).

¹⁷³ Riverside County (2005).

¹⁷⁴ San Bernardino Convention and Visitors Bureau (2005)

¹⁷⁵ County of San Bernardino, Department of Economic and Community Development (2005).

¹⁷⁶ County of San Bernardino (2005).

¹⁷⁷ Airports Council International (2004).



Table 25. Urban Casinos in San Bernardino/Riverside, California				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
San Manuel Bingo & Casino	Highland, CA	17/15	1989	480,000
¹ Casino City Press (2005).				
² Straight line distances from city centers of San Bernardino and Riverside, respectively. Source: MapQuest (2005).				
³ Obtained through state gaming board, casinos, and news sources.				

It has 480,000 square feet of gaming space containing 2,000 slot machines and 99 tables.¹⁷⁸ As part of their gaming compact with the state, the San Manuel Band of Mission Indians, which operates San Manuel Bingo & Casino, has entered into a revenue-sharing agreement.¹⁷⁹ The agreement, which is older and different than that entered into by the United Auburn Indian Community noted above, includes two components: (a) revenue sharing with non-gaming tribes in the state, which is a fixed fee per gaming machine; and (b) revenue sharing payments to the state that may be redistributed to local governments, which are up to 13 percent of gaming machine net win (tiered payment schedule based upon number of machines in operation prior to September 1999, when the compact was entered into).¹⁸⁰

Table 26. Key Statistics for Urban Casinos in San Bernardino/Riverside, California		
Casino	# of Slot Machines¹	# of Tables¹
San Manuel Bingo & Casino	2,000	99
¹ Casino City Press (2005).		

SAN DIEGO, CALIFORNIA

With 1.3 million residents, San Diego is the second largest city in California and the seventh largest city in the country.¹⁸¹ It is located in San Diego County, which has a population of 2.9 million, or 8 percent of the state population, and a median income of \$42,066, which falls below the state median of \$47,493.¹⁸² The county covers an area of 4,200 square miles.¹⁸³

In 2004, 26.7 million tourists spent roughly \$5.5 billion during their stays in San Diego County. This made tourism the county's third largest revenue generator

¹⁷⁸ Casino City Press (2005).

¹⁷⁹ Meister (2005b).

¹⁸⁰ State of California (2004).

¹⁸¹ San Diego Convention and Visitors Bureau (2005a); U.S. Census Bureau (2005a).

¹⁸² U.S. Census Bureau (2005b, 2005c, 2005d).

¹⁸³ U.S. Census Bureau (2005b).



behind manufacturing and military operations.¹⁸⁴ The tourism industry employed roughly 110,000 local residents and provided \$142 million in hotel tax revenue to the county. Furthermore, in its recent tourism forecast, the county predicts that 2005 visitor spending will increase by 5 percent over 2004.¹⁸⁵

San Diego International Airport is the third largest airport in the state.¹⁸⁶ In 2004, 16.4 million passengers passed through the airport, which was a 7 percent increase over the previous year.

San Diego's major tourist attractions include the following:

- amusement parks/zooos
 - San Diego Zoo, SeaWorld, San Diego Wild Animal Park, and LEGOLAND
- outdoor activities
 - hiking, sailing, surfing, and swimming,
- landmarks
 - Cabrillo National Monument, California Missions, Gas Lamp Quarter, Old Town State Park, and San Diego Historical Society
- sports teams/events
 - San Diego Padres (MLB) and San Diego Chargers (NFL)
- colleges and universities
 - University of California at San Diego, San Diego State University, and University of San Diego
- beaches
 - 70 miles of beaches

Casino gaming is also very popular activity among San Diego residents. San Diego has the highest casino participation rate among 23 major U.S. markets (41 percent).¹⁸⁷ San Diego also has the highest average trip frequency with 7.6 trips to casino destinations per year.

One Indian casino, Sycuan Resort & Casino, is located approximately 19 miles from the center of San Diego. While there are several other nearby Indian casino (e.g.,

¹⁸⁴ San Diego Convention and Visitors Bureau (2005b).

¹⁸⁵ San Diego Convention and Visitors Bureau (2005c).

¹⁸⁶ Airports Council International (2004).

¹⁸⁷ Harrah's Entertainment, Inc. (2004).



Barona Valley Ranch Resort & Casino is 22 miles away),¹⁸⁸ they are slightly further than 20 miles outside of the geographic center of San Diego.

Table 27. Urban Casinos in San Diego, California				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Sycuan Casino	El Cajon, CA	19	1982	305,000
¹ Casino City Press (2005).				
² Straight line distances from city centers. Source: MapQuest (2005).				
³ Obtained through state gaming board, casinos, and news sources.				

With 305,000 square feet of gaming space, the facility has 2,000 slot machines and 69 table games.¹⁸⁹ As part of their gaming compact with the state, the Sycuan Band of the Kumeyaay Nation, which operates Sycuan Casino, has entered into a revenue-sharing agreement.¹⁹⁰ The agreement is the same as that entered into by the San Manuel Tribe.

Table 28. Key Statistics for Urban Casinos in San Diego, California		
Casino	# of Slot Machines¹	# of Tables¹
Sycuan Casino	2,000	69
¹ Casino City Press (2005).		

ST. LOUIS, MISSOURI

St. Louis is the second largest city in Missouri with a population 343,279.¹⁹¹ It is located in St. Louis County, which has a population of 1 million and represents approximately 18 percent of the state population.¹⁹² The county covers an area of 508 square miles.¹⁹³ St. Louis County's median household income is \$50,532, which is far above the state median household income of \$37,934.¹⁹⁴

St. Louis has become a major center for corporate headquarters. It is the home of Anheuser-Busch Breweries, A.G. Edwards, Edward Jones, Energizer, Monsanto, and Solutia.¹⁹⁵ St. Louis is also home to manufacturing plants for railway cars,

¹⁸⁸ Straight line distance from city center. Source: MapQuest (2005).

¹⁸⁹ Casino City Press (2005).

¹⁹⁰ Meister (2005b).

¹⁹¹ U.S. Census Bureau (2005a).

¹⁹² U.S. Census Bureau (2005c, 2005d).

¹⁹³ U.S. Census Bureau (2005b).

¹⁹⁴ U.S. Census Bureau (2005b).

¹⁹⁵ Missouri State Tourism (2005).



DaimlerChrysler, General Motors, and Ford Motor Company.¹⁹⁶ In addition, the greater St. Louis region has developed a health care industry.

Lambert-St. Louis Airport, the largest airport in the state, had 13.4 million passengers in 2004, a 35 percent decrease from 2003.¹⁹⁷

In 2003, greater St. Louis generated approximately \$3 billion from tourist activities. This is credited to an abundance of tourist attractions:

- amusement parks/zoo
 - St. Louis Zoo, Forest Park, Zoological Park, and Planetarium
- landmarks
 - Gateway Arch, Cathedral Basilica of Saint Louis, and Laclede's Landing
- concerts and performing arts
 - St. Louis Symphony Orchestra and Delmar Loop
- museums
 - St. Louis Art Museum and City Museum
- sports teams/events
 - Cardinals (MLB) and Rams (NFL)

The St. Louis casino gaming market is served by five riverboats, three in Missouri and two in Illinois. The five riverboats located in Missouri and Illinois are all within 20 miles of the center of the St. Louis metropolitan area.

Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Ameristar Casino St. Charles	St. Charles, MO	18	1994	130,000
Harrah's Maryland Heights	Maryland Heights, MO	17	1997	120,000
President Casino on the Admiral	St. Louis, MO	0	1994	58,000
Alton Belle II	Alton, IL	18	N/A	23,000
Casino Queen	East St. Louis, IL	1	1993	275,000
Total				606,000
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained from state gaming commission, casinos, and news sources.				

¹⁹⁶ Missouri State Tourism (2005).

¹⁹⁷ Airports Council International (2004).



The riverboats have a total of 606,000 square feet of gaming space with 9,218 gaming machines and 241 table games, combining for total gross gaming revenue of \$921 million in calendar year 2004. The riverboats employed 6,363 workers and paid more than \$113 million in wages.

Table 30. Key Statistics for Urban Casinos in St. Louis, Missouri

Casino	# of Slot Machines ^{1,3}	# of Tables ^{1,3}	2004 Revenue ^{1,3}	2004 Tax Revenue ^{1,3}	2004 Employees ^{2,3,4}	2004 Wages ^{2,3,4}
Ameristar Casino St. Charles	3,274	87	\$295,090,984	\$59,018,197	1,923	\$44,100,000
Harrah's Maryland Heights	2,652	62	\$279,739,717	\$55,947,943	1,959	\$52,600,000
President Casino on the Admiral	1,100	38	\$72,541,910	\$14,508,382	682	\$16,700,000
Alton Belle II	1,069	20	\$107,331,901	\$41,157,763	699	N/A
Casino Queen	1,123	34	\$166,262,134	\$73,707,409	1,100	N/A
Total	9,218	241	\$920,966,646	\$244,339,694	6,363	\$113,400,000

¹ Missouri Gaming Commission (2004b, 2004c).
² Missouri Gaming Commission (2004a)
³ Illinois Gaming Board (2004).
⁴ Employees and wages in Missouri are for fiscal year 2004. Employees in Illinois are for calendar year 2004.

Gaming tax revenue was a combined total of \$244 million in 2004. In Illinois, gaming tax revenue from riverboat casinos is spent on education assistance and given to local governments.¹⁹⁸ Gaming taxes from the Alton Belle specifically have been used locally to fund the construction and development of a new city hall, firehouse, and law enforcement facility.¹⁹⁹ The community has also been able to sustain a street improvement program and a “Rainy Day” fund. Gaming taxes from the Casino Queen have been used to upkeep the streets and sewers of East St. Louis and reduce property taxes.²⁰⁰

In Missouri, gaming tax revenue is spent on education, local safety programs, treatment of gambling disorders, veterans’ programs, and early childhood programs.²⁰¹

TAMPA, FLORIDA

Tampa is the third largest city in Florida with a population of 303,447.²⁰² It is located in Hillsborough County, which has a geographic area of 1,051 square miles.²⁰³ Hillsborough County has a population of approximately 1.1 million and is the fourth most populated county in Florida with approximately 6 percent of the population.²⁰⁴

¹⁹⁸ The American Gaming Association (2005).

¹⁹⁹ Illinois Gaming Board (2004).

²⁰⁰ Illinois Gaming Board (2004).

²⁰¹ American Gaming Association (2005).

²⁰² U.S. Census Bureau (2005a).

²⁰³ U.S. Census Bureau (2005b).

²⁰⁴ U.S. Census Bureau (2005c, 2005d).



The median household income in the county is \$40,663, which is above the state average of \$38,819.²⁰⁵

The local economy relies heavily on tourism. In 2004, Hillsborough County saw a healthy increase in the number of visitors (2.5 percent) and spending by visitors (13.5 percent).²⁰⁶ As a result of its reliance on tourism, transportation is important. Tampa International Airport is the fourth largest airport in Florida with 17.4 million passengers in 2004 (12 percent increase from 2003).²⁰⁷ *Conde Nast Traveler* magazine rated Tampa International Airport the best airport in the United States and the third best in the world.²⁰⁸ The area also relies upon the Port of Tampa, which is the largest port in the southeast and one of the fastest growing cruise ports in the U.S.²⁰⁹

Other leading industries in Hillsborough County include services, banking, and telecommunications.²¹⁰

The Hillsborough County area offers an assortment of tourist attractions:

- amusement parks/zoo
 - Busch Gardens and Adventure Island, Sunken Gardens, Florida Aquarium, and Lowry Park Zoo
- landmarks
 - Hyde Park Historic District, Ybor City Historic District, and West Tampa Historic District
- concerts and performing arts
 - Tampa Bay Performing Arts Center
- museums
 - Tampa Museum of Art, Museum of Science and Industry, Ybor City State Museum, Plant Museum, Children’s Museum of Tampa, Florida Holocaust Museum, and Florida International Museum
- shopping
 - Tyrone Square Mall, Gateway Mall, Hoffman Porges Gallery, Britton Plaza, and Old Hyde Park Village
- sports teams/events
 - Devil Rays (MLB) and Buccaneers (NFL)

²⁰⁵ U.S. Census Bureau (2005f).

²⁰⁶ Tampa Bay Convention and Visitors Bureau (2005a).

²⁰⁷ Airports Council International (2004).

²⁰⁸ Tampa Bay Convention and Visitors Bureau (2005b).

²⁰⁹ Tampa Bay Convention and Visitors Bureau (2005c).

²¹⁰ Wikipedia (2005).



- universities
 - University of South Florida and University of Tampa
- beaches
 - abundance of beaches, lakes, and rivers

Participation in casino gambling by Tampa/St. Petersburg residents rather low compared to other parts of the U.S. It was 15 percent compared to the overall U.S. rate is 26 percent.²¹¹

Only one casino exists approximately six miles from the center of the Tampa metropolitan area.

Table 31. Urban Casinos in Tampa, Florida Market				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Seminole Hard Rock Hotel and Casino	Tampa, FL	6	1982	90,000
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained from casinos and news sources.				

The Seminole Hard Rock Hotel and Casino, which was renovated in 2004, has a gaming area of 90,000 square feet with 1,850 slot machines and 50 tables. It also added a 250-room hotel, a spa, several restaurants and bars, and entertainment.

Table 32. Key Statistics for Urban Casinos in Tampa, Florida Market		
Casino	# of Slot Machines¹	# of Tables¹
Seminole Hard Rock Hotel and Casino	1,850	50
¹ Casino City Press (2005).		

TUCSON, ARIZONA

Tucson is Arizona's second largest city with a population of 512,023.²¹² It is located in Pima County, which has a geographic area of 9,186 square miles.²¹³ Pima County has a population of 907,029 and is the second most populated county in Arizona with 16 percent of the population.²¹⁴ The median household income in the county is \$36,758, which is below the state average of \$40,558.²¹⁵

²¹¹ Harrah's Entertainment, Inc. (2004).

²¹² U.S. Census Bureau (2005a).

²¹³ U.S. Census Bureau (2005b).

²¹⁴ U.S. Census Bureau (2005c, 2005d).

²¹⁵ U.S. Census Bureau (2005f).



One major industry in Tucson is the high tech aerospace industry.²¹⁶ Major employers in the area include IBM, Raytheon, the U.S. military, and the University of Arizona.²¹⁷ Travel and tourism has been one of the most rapidly growing industries in Tucson. It now accounts for one in ten jobs and adds \$1.8 billion to the local economy.²¹⁸

Tucson International Airport is the second largest commercial airport in Arizona. In 2004, it handled approximately 3.8 million passengers, 8 percent more than the previous year.²¹⁹

The city offers a variety of tourist attractions:

- amusement parks/zoos
 - Old Tucson Studios
- historic sites/monuments
 - Casa Grande Ruins National Monument, Ironwood Forest National Monument, McFarland State Historic Park, Tubac Presidio State Historic Park, Biosphere 2, and Mission San Xavier del Bac
- museums
 - Arizona-Sonora Desert Museum and Pima Air & Space Museum
- universities
 - University of Arizona
- community events/festivals
 - Tucson Gem & Mineral Show, La Fiesta de los Vaqueros (the largest outdoor mid-winter rodeo in America), Tucson International Mariachi Conference, and Peach Mania Festival

There are three Indian casinos within 20 miles of the center of the Tucson metropolitan area. They have a total of 328,000 square feet of gaming space.

²¹⁶ Tucson Regional Economic Opportunities (2005a).

²¹⁷ Tucson Regional Economic Opportunities (2005b).

²¹⁸ City of Tucson, Department of Urban Planning and Design (2005).

²¹⁹ Airports Council International (2004).



Table 33. Urban Casinos in Tucson, Arizona Market				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage¹
Casino of the Sun	Tucson, AZ	10	1994	40,000
Casino Del Sol	Tucson, AZ	16	2001	240,000
Desert Diamond Casino	Tucson, AZ	7	1993	48,000
Total				328,000
¹ Casino City Press (2005).				
² Straight line distances from city center, except for Casino Del Sol, which is a driving distance. Source: MapQuest (2005).				
³ Obtained from state department of gaming.				

They also offer 2,313 gaming machines and 92 table games.

Table 34. Key Statistics for Urban Casinos in Tucson, Arizona Market		
Casino	# of Slot Machines¹	# of Tables¹
Casino of the Sun	507	6
Casino Del Sol	998	47
Desert Diamond Casino	808	39
Total	2,313	92
¹ Casino City Press (2005).		

As noted in the section on Phoenix, the Indian casinos in Arizona, including the three near Tucson, employed a total of 8,876 workers in 2001.²²⁰ As also noted for Phoenix, Arizona tribes have entered into revenue-sharing agreements with the state, whereby the tribes contribute 1 to 8 percent of Class III net win to state and local governments.²²¹ For calendar year 2004, the tribes contributed a total of \$70.4 million.

TULSA, OKLAHOMA

Tulsa is the second largest city in Oklahoma with a population of 383,764.²²² It is located in Tulsa County, which has a geographic area of 570 square miles.²²³ Tulsa County has a population of 569,148 and is the second most populated in county in Oklahoma with 16 percent of the population.²²⁴ The median household income in the county is \$38,213, which is well above the state average of \$33,400.²²⁵

²²⁰ Cornell and Taylor (2001).

²²¹ Meister (2005b).

²²² U.S. Census Bureau (2005a).

²²³ U.S. Census Bureau (2005b).

²²⁴ U.S. Census Bureau (2005c, 2005d).

²²⁵ U.S. Census Bureau (2005f).



Leading industries include energy, aerospace, telecom, high technology, and insurance.²²⁶ Tulsa is also home to many car rental companies, including Avis, Dollar, Thrifty, Budget, and National. Also of significance are the aviation-related businesses in Tulsa, including an American Airlines maintenance facility.

Tulsa International Airport is the second largest commercial airport in Oklahoma. The number of passengers increased 7 percent from the previous year to approximately 2.9 million in 2004.²²⁷

Tulsa County's attractions include:

- amusement parks/zoo
 - Tulsa Zoo, Big Splash Water Park, and Bell's Amusement Park
- landmarks
 - Hotel Ambassador, Tulsa Union Depot & Jazz Hall of Fame, and Westhope
- community events
 - Tulsa State Fair, Tulsa Oktoberfest, Tulsa International Mayfest, and Juneteenth on Greenwood
- museums
 - Gilcrease Museum, Tulsa Air and Space Center, Philbrook Museum of Art, and Sunbelt Railroad Museum

There are four Indian casinos within 15 miles of the center of the Tulsa metropolitan area.

Table 35. Urban Casinos in Tulsa, Oklahoma Market				
Casino	Location¹	Miles from City²	Open Date³	Gaming Square Footage^{1,4}
Creek Nation Casino Tulsa	Tulsa, OK	7	N/A	38,000
Million Dollar Elm Casino Sand Springs	Sand Springs, OK	6	2004	22,500
Cherokee Casino Resort	Catoosa, OK	12	N/A	80,000
Creek Nation Casino - Okmulgee	Okmulgee, OK	7	1987	28,000
Total				168,500
¹ Casino City Press (2005).				
² Straight line distances from city center. Source: MapQuest (2005).				
³ Obtained through casinos and news sources.				
⁴ Analysis Group research.				

²²⁶ Wikipedia (2005).

²²⁷ Airports Council International (2004).



The casinos have a total of 168,500 square feet of gaming space with 3,486 gaming machines and 87 table games.²²⁸

Table 36. Key Statistics for Urban Casinos in Tulsa, Oklahoma Market		
Casino	# of Slot Machines¹	# of Tables¹
Creek Nation Casino Tulsa	1,100	14
Million Dollar Elm Casino Sand Springs	550	4
Cherokee Casino Resort	1,500	69
Creek Nation Casino - Okmulgee	336	0
Total	3,486	87
¹ Casino City Press (2005); Analysis Group research.		

As noted in the section on Oklahoma City, Indian gaming facilities statewide supported 3,857 jobs and \$43 million in wages in 2001.²²⁹ The Oklahoma tribes have entered into revenue sharing agreements with the state as previously noted.²³⁰

In addition, some Indian casinos in Oklahoma, including those in and near Tulsa, have been able to generate tourism. Non-Oklahomans constitute between half and three-quarters of customers at Oklahoma Indian gaming operations near state borders.²³¹

As previously noted in the Oklahoma City, Indian gaming in the state it is expected continues to grow in 2005 given the expansion to include poker and blackjack

²²⁸ Casino City Press (2005).

²²⁹ Grant, K. et al. (2004).

²³⁰ State of Oklahoma, Office of State Finance.

²³¹ Grant, K. et al. (2004).



5. References

About.com. 2005. "Pittsburgh Facts, Pittsburgh First." Website accessed July 6, 2005 (<http://Pittsburgh.about.com/cs/aboutPittsburgh/a/facts.htm>).

Airports Council International. 2004. "2004 North American Airports Traffic Statistics."

Albuquerque Economic Development. 2005. "Regional Profile: Target Industries." Website accessed July 5, 2005 (<http://www.abq.org/regional/target.html>).

American Gaming Association. 2005. "2005 State of the States: The AGA Survey of Casino Entertainment."

Arizona Department of Gaming. 2005. "Status of Tribal Gaming as of 05/02/05."

Blue Ribbon Commission on Michigan Gaming. 2002. "Blue Ribbon Report: Executive Summary."

Broward County, Florida, Office of Urban Planning and Redevelopment. 2005. "State of the Broward Economy: 2004 Wrap-up/2005 Outlook." Website accessed July 6, 2005 (<http://www.broward.org/stateofeconomy.pdf>).

Business Facilities Online. 2004. "Oklahoma Gathers Accolades." Website accessed July 6, 2005 (http://www.facilitycity.com/busfac/bf_04_07_analysis1.asp).

California Horse Racing Board. 2004. "Statistical Report of Operations."

California Lottery. 2004. "Comprehensive Annual Financial Report: For the Fiscal Year Ended June 30, 2004."

Carstensen, F., et al. 2000. "The Economic Impact of the Mashantucket Pequot Tribal Nation Operations on Connecticut." Connecticut Center for Economic Analysis, University of Connecticut.

Casino City Press. 2005. *GBDonline*.

Chicago Convention and Visitors Bureau. 2005. "Chicago Travel Statistics." Website accessed July 11, 2005 (http://www.choosechicago.com/stats/travel_overview.pdf).

Christiansen Capital Advisors LLC. 2004. "Gross Annual Wager of the United States."



City of Albuquerque. 2005. "Sunport Info: Facts and Figures." Website accessed July 5, 2005 (<http://www.cabq.gov/airport/facts.html>).

City of Fort Lauderdale, Florida. 2005. "About Fort Lauderdale." Website accessed July 5, 2005 ("<http://ci.ftlaud.fl.us/about.htm>).

City of Tucson, Department of Urban Planning and Design. 2005. "Tourism." Website accessed July 10, 2005 (<http://www.tucsonaz.gov/planning/tucsontrends2005/tourism.pdf>).

Cornell, S. and J. Taylor. 2001. "An Analysis of the Economic Impacts of Indian Gaming in the State of Arizona." Udall Center for Studies in Public Policy, University of Arizona.

County of San Bernardino. 2005. "Facts and Statistics." Website accessed July 20, 2005 (<http://www.co.san-bernardino.ca.us/facts.htm>).

County of San Bernardino, Department of Economic and Community Development. 2005. "Tourism Promotion." Website accessed July 20, 2005 (<http://www.sbcounty.gov/ecd/economic/tourism.htm>).

Deloitte & Touche, LLP. 1997. "Economic Impacts of Casino Gaming on the City of Detroit."

Detroit Visitor's Center. 2005. "About Detroit." Website accessed July 5, 2005 (<http://www.visitdetroit.com/visitorcenter/aboutdetroit>).

Division of Gambling Control, Department of Justice, Office of the Attorney General, State of California. 2005. Direct communications with the agency.

General Assembly of Pennsylvania. 2004. "House Bill No. 2330." Session of 2004.

GLS Research, Inc. 2005. "Las Vegas Visitor Profile: Calendar Year 2004." Prepared for the Las Vegas Convention and Visitors Authority.

Grant, K., et al. 2004. "Social and Economic Consequences of Indian Gaming in Oklahoma," Native Nations Institute and the Harvard Project on American Indian Economic Development.

Greater Minneapolis Convention & Visitors Association. 2005. "Things to Do." Website accessed July 7, 2005 (<http://www.minneapolis.org/thingstodo>).

Greater Philadelphia Tourism Marketing Corporation. 2004. "Philadelphia Beats National Tourism Growth Averages." Website accessed July 11, 2005 (<http://www.gophila.com/pressroom/main/newsreleases/releases/041216philabetsnational.htm>).



Greater Pittsburgh Convention and Center Bureau. 2005a. "What's So Great." Website accessed July 6, 2005 (<http://www.visitPittsburgh.com/static/index.cfm?contentID=104>).

Greater Pittsburgh Convention and Visitor Bureau. 2005b. "Visitors and Residents." Website accessed July 6, 2005 (<http://www.pittsburgh-cvb.org/static/index.cfm?contentID=1>).

Harrah's Entertainment Inc. 2004. "Harrah's Survey '04: Profile of the American Casino Gambler."

Harrah's Entertainment, Inc. 2005. "Statistical Data as of March 31, 2005."

Harrison County Development Commission. 2000. "The Mississippi Coast Miracle."

Harrison County Development Commission, in conjunction with the Gulf Coast Gaming Association. 2002. "The 'Mississippi Coast Miracle': The Impact of the Gaming Industry - 10 Years Later (August 1992 to August 2002)."

Illinois Gaming Board. 2004. "2004 Illinois Gaming Board Annual Report."

Indiana Gaming Commission. 2004. "Annual Report to the Governor, Fiscal Year 2004."

Kansas City Tourism. 2005. "About Kansas City." Website accessed July 7, 2005 (http://www.visitkc.com/visitor_info/index.cfm?page=visitor_info_aboutkc.htm).

Klacik, D., L. Littlepage, and S. Payton. 2001. "Five Year License Renewal: Argosy Casino."

LA INC, the Convention and Visitors Bureau. 2005 (forthcoming). "LA Travel Stats 2004."

MapQuest. 2005. (<http://www.mapquest.com>)

Meister, Alan. 2005a. "The Potential Economic and Fiscal Impact of the Proposed Gabrielino Casino Resort on Los Angeles County." Prepared for the Gabrielino-Tongva Tribe.

Meister, Alan, 2005b. *Indian Gaming Industry Report, 2005-2006 Edition*, Newton: Casino City Press.

Michigan Gaming Control Board. 2004. "Detroit Casino Revenues and Wagering Taxes 2004."

Minnesota Indian Gaming Association. 2005. "Statewide Economic Impact."



Mississippi Development Authority, Tourism Division Research Unit. 2005. "Fiscal Year 2004 Economic Impact for Tourism in Mississippi."

Missouri Gaming Commission. 2004a. "Annual Report to the General Assembly Fiscal Year 2004."

Missouri Gaming Commission. 2004b. "Fiscal 2004 YTD Admissions, Patrons and AGR Summary, Month Ended: June 30, 2004."

Missouri Gaming Commission. 2004c. "Fiscal 2005 YTD Admissions, Patrons and AGR Summary, Month Ended: May 31, 2005."

Missouri State Tourism. 2005. "Fast Facts." Website accessed July 5, 2005 (<http://www.visitmo.com/mainpage.cfm?SectionID=1&LeftNavID=1&SubNavID=0&BottomNavID=0>).

MSN Encarta. 2005a. "Milwaukee." Website accessed July 7, 2005 (http://encarta.msn.com/encyclopedia_761552981/Milwaukee.html).

MSN Encarta. 2005b. "Sacramento (City)." Website accessed July 7, 2005 ([http://encarta.msn.com/encyclopedia_761568738/Sacramento_\(city\).html](http://encarta.msn.com/encyclopedia_761568738/Sacramento_(city).html)).

New Jersey Casino Control Commission. 1998. "Casino Gambling in New Jersey: A Report to the National Gambling Impact Study Commission."

New Mexico Gaming Control Board. 2003. "2003 Annual Report."

New Mexico Gaming Control Board. 2004a. May 26, 2004 Net Win Press Release.

New Mexico Gaming Control Board. 2004b. August 27, 2004 Net Win Press Release.

New Mexico Gaming Control Board. 2004c. November 30, 2004 Net Win Press Release.

New Mexico Gaming Control Board. 2005a. March 16, 2005 Net Win Press Release.

Oakland Convention and Visitors Bureau. 2005. "About Oakland." Website accessed July 20, 2005 (http://www.oaklandcvb.com/visiting_about_oakland.cfm).

Oklahoma Tourism and Recreation Department. 2003. "Tourism Industry: Facts and Stats." Website accessed July 12, 2005 (<http://www.travelok.com/industry/facts.asp>).

Philadelphia Gaming Advisory Task Force. 2005. "Gaming in Philadelphia: An Opportunity and a Challenge."



Philadelphia International Airport. 2005a. "Philadelphia International Airport Breaks All-Time 12-Month Passenger Record in First 11 Months in 2004." Website accessed July 6, 2005 (<http://www.phl.org/text/news/050112.html>).

Philadelphia International Airport. 2005b. "Taxis and Trains." Website accessed July 6, 2005 (http://www.phl.org/text/taxis_trains.html).

Richman, Josh. 2005. "Tribe set for San Pablo debut of electronic bingo machines," article in the *Oakland Tribune* on July 30, 2005.

Riverside County, California. 2005. "Riverside County History." Website accessed July 20, 2005 (http://www.co.riverside.ca.us/county_info/history.asp).

San Bernardino Convention and Visitors Bureau. 2005. "About San Bernardino." Website accessed July 20, 2005 (http://www.san-bernardino.org/about/index_about.html).

San Diego Convention and Visitors Bureau. 2005a. "About San Diego." Website accessed July 19, 2005 (http://www.sandiego.org/about_sdv.asp).

San Diego Convention and Visitors Bureau. 2005b. "San Diego County 2004 Visitor Industry General Facts." Website accessed July 19, 2005 (<http://www.sandiego.org/pdf/2004GeneralFacts.pdf>).

San Diego Convention and Visitors Bureau. 2005c. "2005 San Diego County Travel Forecast." Website accessed July 19, 2005 (<http://www.sandiego.org/pdf/SDSUConvis2005Forecast.pdf>).

San Francisco Convention and Visitors Bureau. 2005a. "Conventions." Website accessed July 20, 2005 (<http://www.sfcvb.org/convention>).

San Francisco Convention and Visitors Bureau. 2005b. "Press Releases." Website accessed July 20, 2005 (http://www.sfcvb.org/travel_media/press.asp?rid=17).

San Francisco Convention and Visitors Bureau. 2005c. "Breakdown of San Francisco Annual Visitor Volume & Spending (2003 vs. 2004)." Website accessed July 20, 2005 (http://www.sfcvb.org/media/downloads/research/2004_visitor_statistics.pdf).

San Francisco Convention and Visitors Bureau. 2005d. "San Francisco Visitor Industry Statistics." Website accessed July 20, 2005 (<http://www.sfcvb.org/research/>).

State of California. 1999. "Tribal-State Gaming Compact." Model compact.



State of California and United Auburn Indian Community. 2004. "Amendment to Tribal-State Compact between the State of California and the United Auburn Indian Community."

Tampa Bay Convention and Visitors Bureau. 2005a. "Analysis of Hillsborough County Visitor: Key Findings." Website accessed July 7, 2005 (http://www.visittampabay.com/pressroom/2004_research_synopsis_public_version.pdf).

Tampa Bay Convention and Visitors Bureau. 2005b. "Tampa International Airport." Website accessed July 7, 2005 (<http://www.visittampabay.com/areainfo/gettinghere/>).

Tampa Bay Convention and Visitors Bureau. 2005c. "Tampa Bay Facts." Website accessed July 7, 2005 (http://www.visittampabay.com/pressroom/2004_research_synopsis_public_version.pdf).

Taylor, J., J. Kalt, and K. Grant, II. 2002. "Public Policy Analysis of Indian Gaming in Massachusetts: A Report to the Government of the Wampanoag Tribe of Gay Head (Aquinnah)." The Harvard Project on American Indian Economic Development.

Travel Industry Association of America. 2002. "Economic Impact of Travel in Oklahoma Counties."

Travel Industry Association of America. 2000. "Profile of Travelers Who Participate in Gambling."

Tucson Regional Economic Opportunities. 2005a. "Community Profile." Website accessed July 10, 2005 (<http://www.treoaz.org/static/index.cfm?contentID=52>).

Tucson Regional Economic Opportunities. 2005b. "Top 25 Employers in Southern Arizona." Website accessed July 10, 2005 (<http://www.treoaz.org/static/index.cfm?contentID=87>).

U.S. Census Bureau. 2005a. "Annual Estimates of the Population for Incorporated Places Over 100,000, Ranked by July 1, 2004 Population: April 1, 2000 to July 1, 2004."

U.S. Census Bureau. 2005b. "State and County QuickFacts." Website accessed July 5, 2005 (<http://quickfacts.census.gov>).

U.S. Census Bureau. 2005c. "Annual Estimates of Population Change for the United States and States, and for Puerto Rico and State Rankings: July 1, 2003 to July 1, 2004."



U.S. Census Bureau. 2005d. "Population Estimates for the 100 Largest U.S. Counties Based on July 1, 2004 Population Estimates: April 1, 2000 to July 1, 2004."

U.S. Census Bureau. 2005e. "Annual Estimates of Population Change for Incorporated Places Over 100,000, Ranked by Percent Change: July 1, 2003 to July 1, 2004."

United States Congress. 1988. *Indian Gaming Regulatory Act*, 25 U.S.C. § 2701-2721.

Wikipedia, the free encyclopedia. 2005. Website accessed July 5, 2005 (<http://en.wikipedia.org>).



6. Appendix A: About the Author

Dr. Meister is an economist specializing in the application of economics to complex business issues and commercial litigation. His areas of expertise include economic impact analyses, market and feasibility analyses, economic planning and policy, antitrust, regulation, statistics, and the calculation of economic damages in commercial litigation.

Dr. Meister has extensive experience conducting economic impact studies. He combines his expertise with impact analysis, economics, planning, market analysis, statistics, and survey analysis to identify and measure the effects of proposed, existing, and discontinuing economic activity. His projects have involved casinos, hotels, resorts, sporting and entertainment events, retail establishments, medical research, publicly-funded projects, and ballot initiatives. Most notable has been his authoritative research on Indian gaming. He has received national recognition for his annual studies on Indian gaming. His work is regularly cited by the press and relied upon by the gaming industry, governments, and the investment community. Dr. Meister's research and analyses have also been relied upon before the United States Supreme Court and a panel of the World Trade Organization. Furthermore, he has written extensively on the subject and presented his work at various academic, professional, and industry conferences. In addition, he has testified before the California State Senate regarding Indian gaming issues.

With regards to his statistics work, Dr. Meister has conducted sophisticated regression analysis, statistical testing, and survey analysis. He has served as an expert regarding the use of statistics in forensic analysis and skill versus chance assessments of amusement games. Dr. Meister also has designed and implemented surveys. Prior to joining Analysis Group, Dr. Meister worked for a market research firm that implemented surveys for the motion picture industry. In addition, he was a teaching assistant for five years at the University of California, Irvine, where he taught courses on statistics, probability, econometrics, and survey design.

Dr. Meister has broad experience providing litigation consulting services. Specifically, he has provided assistance to attorneys on all phases of pretrial and trial practice, including assistance with discovery, development of economic, financial, and statistical models, expert testimony, and critique of analyses by opposing experts. Dr. Meister has conducted damages assessments in a wide variety of cases, including antitrust, intellectual property, contract disputes, fraud, and business interruption. Dr. Meister's experience encompasses numerous industries, including gaming, sports and entertainment, hospitality, real estate, telecommunications, computer software and maintenance, pharmaceuticals, tobacco, automotive, food processing, paper products, specialty retail products, and electronics.



7. Appendix B: About Analysis Group, Inc.

Analysis Group provides economic, financial, and business strategy consulting to corporations, law firms, and government entities. We advise corporate and government clients on a range of business issues that require expert interpretation of economic and financial data, including economic impact studies, market and competitive analyses, financial planning, employment and contractual matters, tax and transfer pricing issues, company and asset valuations, cost-effectiveness analyses, and evaluation of mergers and acquisitions. We help organizations create strategies for growth by analyzing market dynamics and organizational capabilities, enhancing innovation in current products and services, and identifying new market opportunities. We also assist law firms with all aspects of litigation, including pretrial discovery, development of economic and financial models, preparation of testimony, and critique of opposing experts.

Analysis Group, which was founded in 1981, has over 300 professional staff members, most with degrees in economics, finance, statistics, accounting, management, or law. We also work closely with an extensive network of experts at leading universities who help us develop state-of-the-art analyses and compelling insights for our clients. The academic rigor imposed by these relationships, coupled with our commitment to teamwork, ensures that our clients receive the highest caliber work product and service.

Analysis Group's practice areas include antitrust, commercial litigation, economic impact studies, energy, entertainment and sports, environmental economics, financial institutions, growth & innovation, health care economics, intellectual property, labor & employment economics, mergers & acquisitions, real estate, securities, telecommunications, transfer pricing, and valuation.

Analysis Group has offices in Boston, Dallas, Denver, Los Angeles, Menlo Park, Montreal, New York, San Francisco, and Washington, DC.

