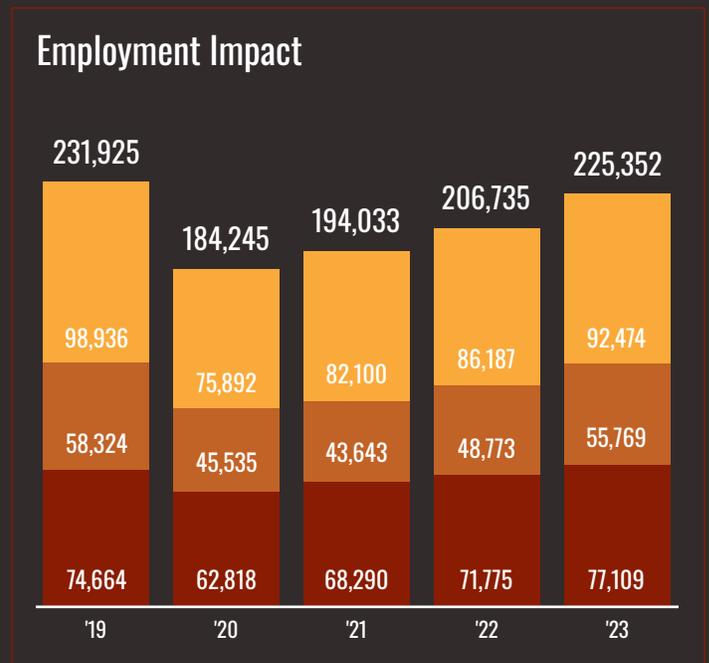
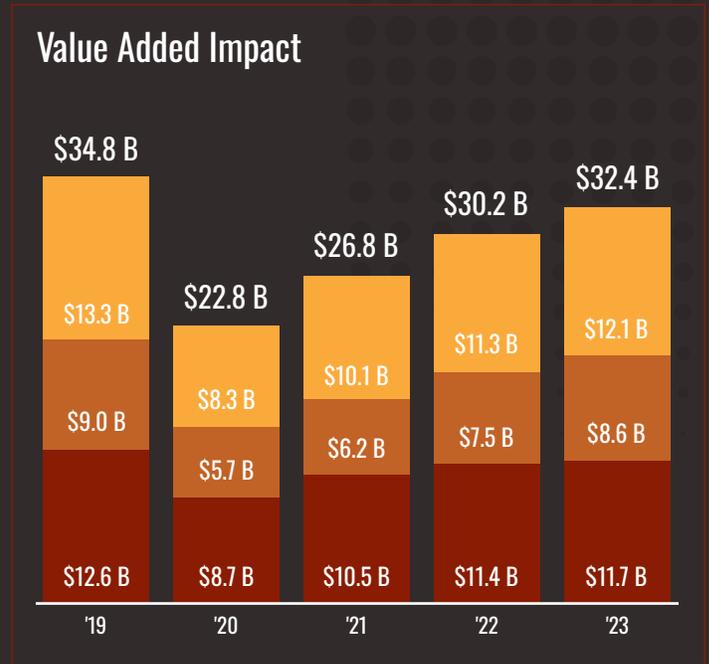
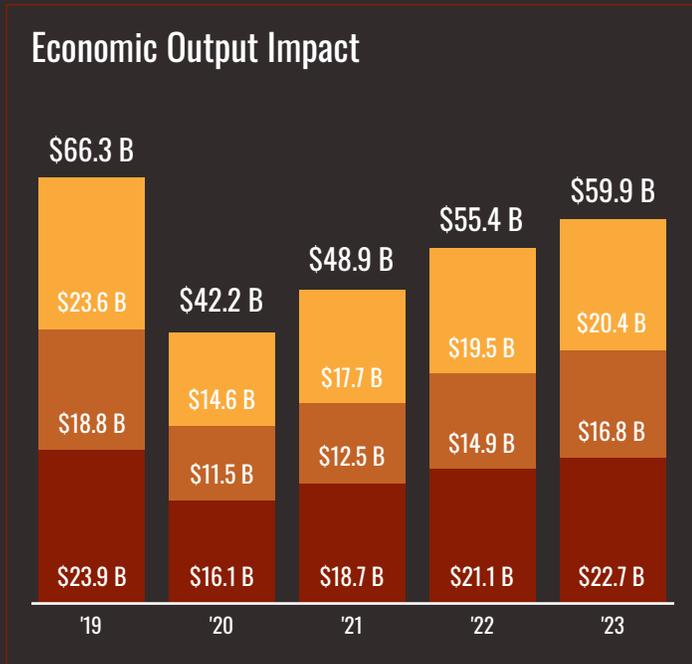
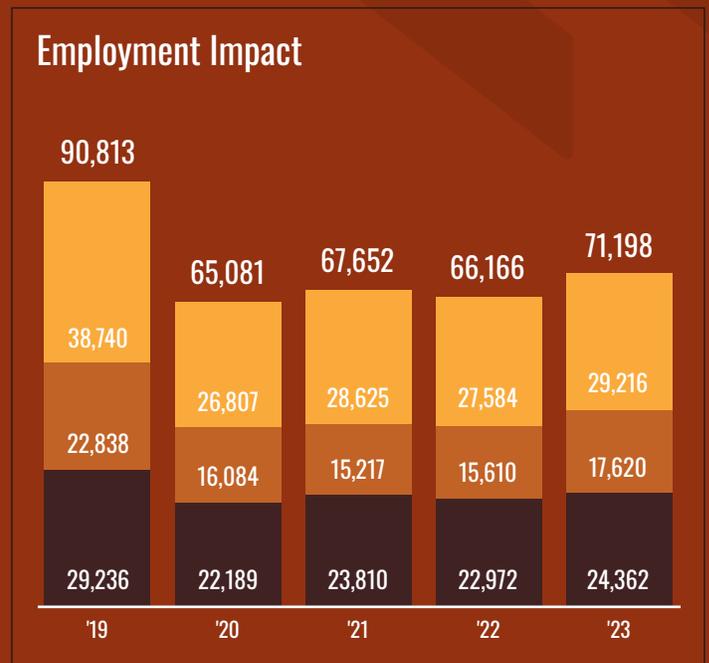
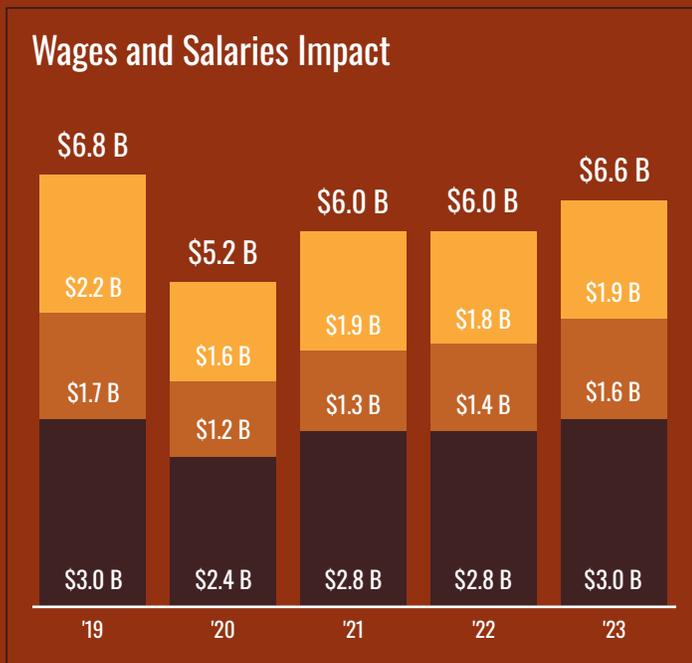
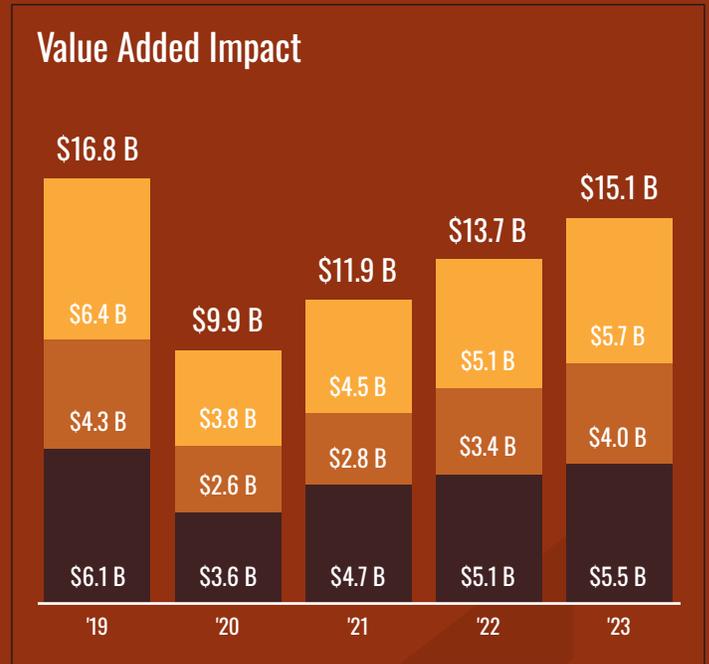
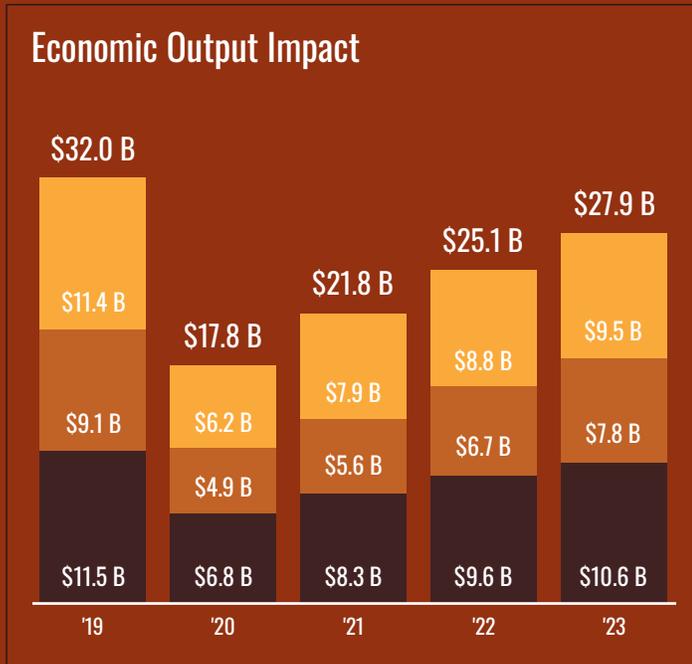


Historical Impacts of the Global Gaming Supplier Industry



Direct Impact Indirect Impact Induced Impact

Historical Impacts of Companies with Operations in Nevada



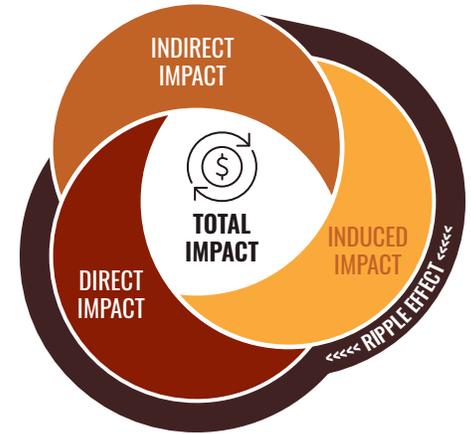
Direct Impact
Indirect Impact
Induced Impact

What We Measure

- **ECONOMIC OUTPUT:** Impact of total spending within the economy
- **VALUE ADDED:** Difference between industry output and the cost of its inputs
- **WAGES & SALARIES:** Impact on personal incomes for employees
- **EMPLOYMENT:** Impact on the number of jobs within the economy

How We Measure

- **DIRECT:** Generated by direct spending of the global gaming supplier industry
- **INDIRECT:** Secondary impacts generated by businesses supporting the economic activities of the industry
- **INDUCED:** Sourced to businesses supported by the spending of direct employees
- **TOTAL:** Sum of direct, indirect and induced impacts



Applied Analysis is an economic analysis and broad-based consulting firm founded in 1997, serving both the public and private sectors. Our team has extensive experience in economics, hospitality consulting, market analysis, information technology, finance and other business consulting roles. We apply this knowledge in an effort to develop creative solutions to our clients' challenges. Additionally, our team has extensive experience in preparing economic and fiscal impact analyses. AA has been retained by a number of organizations and industries to review and analyze the economic, fiscal and social impacts of community investments and operations.

- | | | |
|---|---|--|
| ▪ Allegiant Stadium | ▪ Kinross Gold Corporation | ▪ Resorts World Las Vegas |
| ▪ Association of Gaming Equipment Manufacturers | ▪ Las Vegas Convention and Visitors Authority | ▪ Southern Nevada Home Builders Association |
| ▪ Boyd Gaming | ▪ Las Vegas Global Economic Alliance | ▪ Southern Nevada Tourism Infrastructure Committee |
| ▪ Caesars Entertainment | ▪ Las Vegas Stadium Authority | ▪ Station Casinos |
| ▪ City of Henderson | ▪ MGM Resorts International | ▪ Switch |
| ▪ City of Las Vegas | ▪ Nevada Contractors Association | ▪ T-Mobile Arena |
| ▪ Clark County Regional Flood Control District | ▪ Nevada Gold Mines | ▪ Tesla |
| ▪ Cox Communications | ▪ Nevada Mining Association | ▪ Touro University |
| ▪ Downtown Project | ▪ Nevada Resort Association | ▪ University of Nevada, Reno |
| ▪ Formula 1 | ▪ Nevada State University | ▪ University of Nevada, Las Vegas |
| ▪ Harry Reid International Airport | ▪ NV Energy | ▪ University of Memphis |
| ▪ Insomniac / EDC | ▪ Oakland Athletics | ▪ WWE |
| ▪ Intermountain Health | ▪ Olympia Companies | ▪ UFC |
| ▪ Loneer USA Corporation | ▪ Regional Transportation Commission of Southern Nevada | |

All currency values contained in this analysis are stated in nominal (year-of-expenditure) dollars. Values are also stated in US dollars, so foreign currency translation may also impact reported results. This analysis reflects a snapshot in time and may not be comparable to prior studies given the evolving nature of the industry. The latest report incorporates the most recent available information regarding the industry as whole and the companies operating within the market space. The current report is not necessarily comparable to prior editions due to a number of factors. The industry has continued to evolve as technological advancements and expansions of product offerings have taken place, casting a wider net for the industry in aggregate. Content providers have also become an increasingly integral component of the industry. It is also worth noting that privately-held firms that were acquired by publicly-traded companies have provided additional insight into the size of this historically unreported segment of the market. Overall, the current research provides the most comprehensive reporting on the industry.