KANSAS RACING AND GAMING COMMISSION

LOTTERY GAMING FACILITY REVIEW BOARD

ECONOMIC IMPACTS OF PROPOSED GAMING FACILITIES

NORTHEAST AND SOUTH CENTRAL GAMING ZONES

OCTOBER 2009

CIVIC ECONOMICS

CREATIVITY · OPPORTUNITY · PROSPERITY

CONTENTS

INTRODUCTION

Civic Economics is pleased to present the Kansas Racing and Gaming Commission and the Lottery Gaming Facility Review Board with this economic impact analysis of the proposals for a lottery gaming facility in both the South Central and Northeast Gaming Zones. Fiscal impacts, covering benefits and costs to governmental bodies, are being prepared separately by Meridian Business Advisors.

Civic Economics utilizes IMPLAN, a product of the Minnesota Implan Group and an industry-standard tool for evaluating the impact of economic activities. Given the Board's statewide mandate, Civic Economics used Kansas as the operative study area and applied multipliers and other data from IMPLAN's Local Area Data File for the state rather than for smaller jurisdictions such as counties. Therefore, all impacts reported on the pages that follow are impacts on the State of Kansas.

Economic impacts analyses were conducted for two wholly separate phases of each proposal.

- Construction Impacts cover the development of Phase I of each proposal, including planning and design and actual construction of all facilities required by the applicant's contract with the Kansas Lottery Commission. Expenditures were assumed to occur entirely within 2011. Site acquisition is not included in an economic impact because it is assumed this cost would be necessary for any project which occupies that specific piece of land and therefore is considered a transfer payment and not an economic impact.
- Operating Impacts were prepared for three distinct cases:
    - Phase I, which includes the facilities proposed and contractually obligated for development at the outset. These impacts were calculated for the year 2013.
    - Raving Alternative Minimum, which includes the mix of gaming and ancillary facilities identified by Raving Consulting as constituting the minimum project that constitutes a destination casino. These impacts were calculated for the year 2013.
    - Full Build Out, which includes all facilities proposed by the applicant, even those not contractually obligated. These impacts were calculated for the year 2015.

CONSTRUCTION IMPACTS

The construction phase of each proposed facility will generate substantial but temporary economic activity related to designing and building the gaming facilities and associated infrastructure. In each case, Civic Economics assumed that all expenditures would take place in the year 2011. Inputs were derived from the Performance Templates submitted to the KRGC by the applicants. Because applicant submissions did not provide sufficient data for later phases, construction impacts were only calculated for the contractually mandated Phase I of each proposal.

The economic impact of any construction project is, as one might assume, driven primarily by the total expenditure on the facility. However, impacts will vary depending on the type of expenditure and the likelihood that such expenditures will be made in Kansas. For this analysis, Civic Economics consistently applied the Local Coefficients provided by IMPLAN, as these provide a credible estimate of local spending for each type of expenditure. It should be noted, though, that conscientious project managers with supportive clients can substantially increase the use of local contractors and suppliers. Therefore, the impacts described below may be received as conservative but fairly applied across the board.

Taking our lead from the analysts accustomed to working with gaming facilities, Furniture Fixtures & Equipment (FFE), Floor & Wall Coverings, and Gaming Equipment were not included in the impact inputs for any applicant. These items are quite specialized in the gaming industry and thus will come primarily from out of state.

Impact Reporting

The economic impacts are comprised of three separate categories. Each category is analyzed separately from one another in IMPLAN.

- **Economic Output** is the total production or sales derived from the project. For this study, the total construction costs and casino revenue are the basis for output.
- **Employment** is the total number of Kansans employed both on a full and part time basis in a given industry.
- **Wages** is the amount of salaries and benefits paid to Kansas employees.

For each of the categories listed above a direct effect, indirect effect, and induced effect has been calculated.

- **Direct** effects capture the initial impact created. For construction impacts, this is based on the amount spent in each of a variety of categories in site preparation and facilities design and development. In this analysis, these were provided by the applicants.
- **Indirect** effects are additional impacts derived from businesses providing products or services to the selected industries. This can be restaurants purchasing supplies, the casino hiring a security firm, or the hotel purchasing advertising from a local radio station. Those are all examples of indirect effects.
- **Induced** effects are the result of increased household spending due to the direct and indirect effects. Employees of firms directly or indirectly affected by the project are buying new cars, homes, and groceries locally and this is detailed in the indirect effects.

Chart 1: Applicant Submissions and Model Inputs

APPLICANT SUBMISSION AND MODEL INPUT CORRESPONDENCE
CONSTRUCTION ECONOMIC IMPACT ANALYSIS

Applicant Submission Category		IMPLAN Category Applied	Notes
Buildings	➡	Construction of commercial and institutional buildings	
Land	➡	None	Land purchases are not factored into economic impacts
Land improvements, excluding landscaping	➡	Other new construction	
Landscaping	➡	Other new construction	
Soft Costs, i.e. engineering, architectural, development fees	➡	Architectural and engineering services	
Financing costs	➡	None	Financing costs were not factored into the economic impacts
Public sector infrastructure	➡	Split evenly with Highway, street, bridge, tunnel construction and Water, sewer, and pipeline	
Rolling stock	➡	Motor vehicle and parts dealers	
Furniture, fixtures and equipment	➡	None	Assumed purchases would be made out of state
Floor and wall treatments	➡	None	Assumed purchases would be made out of state
Gaming equipment	➡	None	Assumed purchases would be made out of state

Chart 2: Construction Impact Summary Chart

CONSTRUCTION IMPACTS SUMMARY
2009 GAMING FACILITY PROPOSALS
Based on contractually obligated Phase I development

	Direct	Indirect	Induced	*Total*
ECONOMIC OUTPUT	Total revenues associated with construction ($ Millions)			
Kansas Entertainment	$ 123,480,436	$ 43,001,786	$ 49,102,012	**$ 215,584,229**
Chisholm Creek	$ 53,077,176	$ 19,241,766	$ 19,796,218	**$ 92,115,165**
EMPLOYMENT	Total workers, including full-time and part-time			
Kansas Entertainment	1,102	299	463	***1,863***
Chisholm Creek	475	127	187	***788***
WAGES	Total wages paid to workers identified above ($ Millions)			
Kansas Entertainment	$ 49,604,288	$ 14,329,145	$ 14,910,646	**$ 78,844,077**
Chisholm Creek	$ 19,457,062	$ 6,341,115	$ 6,012,012	**$ 31,810,190**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Chart 3: **Kansas Entertainment** Construction Economic Output*

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY CONSTRUCTION IMPACTS IN THE STATE OF KANSAS, 2011 *Based on contractually obligated Phase I development*					
		ECONOMIC OUTPUT (In 2011 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	143,287	397,078	540,365
20	21 Mining (AGG)	0	1,185,582	634,336	1,819,918
31	22 Utilities (AGG)	0	1,005,556	1,349,523	2,355,079
34	23 Construction (AGG)	106,072,824	344,378	364,088	106,781,288
41	31-33 Manufacturing (AGG)	0	11,613,750	4,803,711	16,417,461
319	42 Wholesale Trade (AGG)	0	4,292,574	3,117,198	7,409,772
320	44-45 Retail trade (AGG)	0	841,579	5,834,729	6,676,308
332	48-49 Transportation & Warehousing (AGG)	0	2,024,228	1,219,894	3,244,122
341	51 Information (AGG)	0	1,266,474	1,381,222	2,647,696
354	52 Finance & insurance (AGG)	0	3,040,874	4,805,859	7,846,732
360	53 Real estate & rental (AGG)	0	2,244,573	8,267,807	10,512,379
367	54 Professional- scientific & tech svcs (AGG)	17,407,612	9,082,375	1,469,346	27,959,332
381	55 Management of companies (AGG)	0	684,559	365,851	1,050,411
382	56 Administrative & waste services (AGG)	0	1,830,894	875,604	2,706,498
391	61 Educational svcs (AGG)	0	11,748	580,599	592,347
394	62 Health & social services (AGG)	0	439	7,677,909	7,678,348
402	71 Arts- entertainment & recreation (AGG)	0	100,299	416,027	516,325
411	72 Accomodation & food services (AGG)	0	1,080,009	2,634,581	3,714,590
414	81 Other services (AGG)	0	1,772,780	2,002,445	3,775,225
427	92 Government & non NAICs (AGG)	0	435,828	904,205	1,340,033
	Total	**$ 123,480,436**	**$ 43,001,786**	**$ 49,102,012**	**$ 215,584,229**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Chart 4: **Kansas Entertainment** Construction Employment*

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY CONSTRUCTION IMPACTS IN THE STATE OF KANSAS, 2011 *Based on contractually obligated Phase I development*					
			TOTAL EMPLOYMENT		
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	0.8	2.5	3.3
20	21 Mining (AGG)	0.0	3.3	1.7	5.0
31	22 Utilities (AGG)	0.0	1.6	2.2	3.8
34	23 Construction (AGG)	946.4	3.6	3.2	953.1
41	31-33 Manufacturing (AGG)	0.0	32.1	9.7	41.7
319	42 Wholesale Trade (AGG)	0.0	26.0	18.8	44.8
320	44-45 Retail trade (AGG)	0.0	15.1	108.8	123.9
332	48-49 Transportation & Warehousing (AGG)	0.0	15.0	10.0	25.0
341	51 Information (AGG)	0.0	3.4	4.5	7.9
354	52 Finance & insurance (AGG)	0.0	16.1	24.4	40.6
360	53 Real estate & rental (AGG)	0.0	15.6	21.2	36.8
367	54 Professional- scientific & tech svcs (AGG)	155.3	80.4	14.1	249.8
381	55 Management of companies (AGG)	0.0	3.3	1.8	5.1
382	56 Administrative & waste services (AGG)	0.0	32.8	14.8	47.6
391	61 Educational svcs (AGG)	0.0	0.2	11.6	11.8
394	62 Health & social services (AGG)	0.0	0.0	99.3	99.3
402	71 Arts- entertainment & recreation (AGG)	0.0	3.3	10.5	13.7
411	72 Accomodation & food services (AGG)	0.0	20.3	52.0	72.3
414	81 Other services (AGG)	0.0	22.1	45.3	67.4
427	92 Government & non NAICs (AGG)	0.0	3.5	6.2	9.7
	Total	**1101.7**	**298.5**	**462.6**	**1862.6**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Chart 5: **Kansas Entertainment** Construction Labor Income*

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY CONSTRUCTION IMPACTS IN THE STATE OF KANSAS, 2011					
Based on contractually obligated Phase I development					
		TOTAL LABOR INCOME (2011 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	18,880	30,600	49,479
20	21 Mining (AGG)	0	254,186	135,593	389,779
31	22 Utilities (AGG)	0	178,342	240,843	419,185
34	23 Construction (AGG)	38,802,880	145,297	146,957	39,095,136
41	31-33 Manufacturing (AGG)	0	1,972,360	704,449	2,676,809
319	42 Wholesale Trade (AGG)	0	1,633,832	1,186,462	2,820,294
320	44-45 Retail trade (AGG)	0	369,559	2,530,615	2,900,174
332	48-49 Transportation & Warehousing (AGG)	0	674,414	412,477	1,086,891
341	51 Information (AGG)	0	262,680	291,408	554,088
354	52 Finance & insurance (AGG)	0	791,915	1,213,728	2,005,643
360	53 Real estate & rental (AGG)	0	397,300	370,657	767,957
367	54 Professional- scientific & tech svcs (AGG)	10,801,408	5,160,820	714,212	16,676,439
381	55 Management of companies (AGG)	0	299,503	160,064	459,567
382	56 Administrative & waste services (AGG)	0	874,404	397,168	1,271,572
391	61 Educational svcs (AGG)	0	4,764	242,620	247,384
394	62 Health & social services (AGG)	0	167	3,992,669	3,992,836
402	71 Arts- entertainment & recreation (AGG)	0	35,033	134,226	169,259
411	72 Accomodation & food services (AGG)	0	342,994	829,037	1,172,030
414	81 Other services (AGG)	0	665,393	785,292	1,450,684
427	92 Government & non NAICs (AGG)	0	247,302	391,569	638,871
	Total	**$ 49,604,288**	**$ 14,329,145**	**$ 14,910,646**	**$ 78,844,077**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Chart 6: **Chisholm Creek** Construction Economic Output*

CHISHOLM CREEK, SUMNER COUNTY CONSTRUCTION IMPACTS IN THE STATE OF KANSAS, 2011 *Based on contractually obligated Phase I development*					
		ECONOMIC OUTPUT (In 2011 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	67,685	160,223	227,909
20	21 Mining (AGG)	0	583,174	255,968	839,142
31	22 Utilities (AGG)	0	464,939	544,685	1,009,625
34	23 Construction (AGG)	53,077,176	143,725	146,740	53,367,640
41	31-33 Manufacturing (AGG)	0	5,649,863	1,937,936	7,587,799
319	42 Wholesale Trade (AGG)	0	2,065,834	1,258,203	3,324,038
320	44-45 Retail trade (AGG)	0	438,482	2,350,483	2,788,965
332	48-49 Transportation & Warehousing (AGG)	0	965,896	491,699	1,457,596
341	51 Information (AGG)	0	523,210	557,139	1,080,349
354	52 Finance & insurance (AGG)	0	1,193,872	1,937,005	3,130,878
360	53 Real estate & rental (AGG)	0	974,342	3,331,207	4,305,550
367	54 Professional- scientific & tech svcs (AGG)	0	3,891,558	592,538	4,484,097
381	55 Management of companies (AGG)	0	283,165	147,553	430,718
382	56 Administrative & waste services (AGG)	0	617,197	353,028	970,225
391	61 Educational svcs (AGG)	0	4,439	233,750	238,188
394	62 Health & social services (AGG)	0	147	3,096,732	3,096,879
402	71 Arts- entertainment & recreation (AGG)	0	35,867	167,625	203,492
411	72 Accomodation & food services (AGG)	0	339,357	1,062,069	1,401,426
414	81 Other services (AGG)	0	827,502	806,981	1,634,483
427	92 Government & non NAICs (AGG)	0	171,512	364,654	536,166
	Total	**$ 53,077,176**	**$ 19,241,766**	**$ 19,796,218**	**$ 92,115,165**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Chart 7: **Chisholm Creek** Construction Employment*

CHISHOLM CREEK, SUMNER COUNTY CONSTRUCTION IMPACTS IN THE STATE OF KANSAS, 2011 *Based on contractually obligated Phase I development*					
			TOTAL EMPLOYMENT		
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	0.4	1.0	1.4
20	21 Mining (AGG)	0.0	1.6	0.7	2.3
31	22 Utilities (AGG)	0.0	0.7	0.9	1.6
34	23 Construction (AGG)	474.5	1.5	1.3	477.3
41	31-33 Manufacturing (AGG)	0.0	15.3	3.9	19.2
319	42 Wholesale Trade (AGG)	0.0	12.5	7.6	20.1
320	44-45 Retail trade (AGG)	0.0	7.9	43.8	51.7
332	48-49 Transportation & Warehousing (AGG)	0.0	7.0	4.0	11.0
341	51 Information (AGG)	0.0	1.4	1.8	3.2
354	52 Finance & insurance (AGG)	0.0	6.4	9.9	16.3
360	53 Real estate & rental (AGG)	0.0	6.4	8.6	15.0
367	54 Professional- scientific & tech svcs (AGG)	0.0	34.8	5.7	40.5
381	55 Management of companies (AGG)	0.0	1.4	0.7	2.1
382	56 Administrative & waste services (AGG)	0.0	10.9	6.0	16.9
391	61 Educational svcs (AGG)	0.0	0.1	4.7	4.8
394	62 Health & social services (AGG)	0.0	0.0	40.0	40.0
402	71 Arts- entertainment & recreation (AGG)	0.0	1.2	4.2	5.4
411	72 Accomodation & food services (AGG)	0.0	6.3	21.0	27.3
414	81 Other services (AGG)	0.0	10.3	18.2	28.5
427	92 Government & non NAICs (AGG)	0.0	1.3	2.5	3.8
	Total	**474.5**	**127.4**	**186.5**	**788.4**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Chart 8: **Chisholm Creek** Construction Labor Income*

CHISHOLM CREEK, SUMNER COUNTY CONSTRUCTION IMPACTS IN THE STATE OF KANSAS, 2011 *Based on contractually obligated Phase I development*					
		TOTAL LABOR INCOME (2011 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	9,101	12,344	21,445
20	21 Mining (AGG)	0	125,106	54,714	179,821
31	22 Utilities (AGG)	0	82,338	97,209	179,547
34	23 Construction (AGG)	19,457,062	60,637	59,230	19,576,928
41	31-33 Manufacturing (AGG)	0	956,638	284,161	1,240,799
319	42 Wholesale Trade (AGG)	0	786,294	478,895	1,265,189
320	44-45 Retail trade (AGG)	0	192,549	1,019,442	1,211,991
332	48-49 Transportation & Warehousing (AGG)	0	320,077	166,248	486,326
341	51 Information (AGG)	0	107,755	117,535	225,290
354	52 Finance & insurance (AGG)	0	312,291	489,243	801,534
360	53 Real estate & rental (AGG)	0	175,017	149,589	324,606
367	54 Professional- scientific & tech svcs (AGG)	0	2,273,222	288,021	2,561,243
381	55 Management of companies (AGG)	0	123,888	64,556	188,444
382	56 Administrative & waste services (AGG)	0	290,551	160,134	450,685
391	61 Educational svcs (AGG)	0	1,828	97,672	99,499
394	62 Health & social services (AGG)	0	56	1,610,399	1,610,454
402	71 Arts- entertainment & recreation (AGG)	0	12,518	54,084	66,602
411	72 Accomodation & food services (AGG)	0	107,906	334,206	442,113
414	81 Other services (AGG)	0	309,207	316,437	625,644
427	92 Government & non NAICs (AGG)	0	94,136	157,893	252,030
	Total	**$ 19,457,062**	**$ 6,341,115**	**$ 6,012,012**	**$ 31,810,190**

Source: Applicant Submissions, IMPLAN, Civic Economics

OPERATING IMPACTS

This section of this report analyzes the economic impacts to be generated by the proposal in the first stabilized year of operation, which is treated as 2013. As with construction, economic impacts were calculated for the entire state of Kansas using the IMPLAN model.

Civic Economics calculated economic impacts for each casino in three separate scenarios:

- Phase I, encompassing the contractually obligated developments to be built at the outset.
- Raving Alternative Minimum
- Complete Build-Out, which in some ways exceeds the scope of work contractually obligated by the applicants.

***Gaming Revenue Adjustment*:** As requested by the Board, applicants provided a detailed spreadsheet looking forward into several years of operations. In all cases, these sheets proceeded from an estimate of the gaming revenue to be earned at each facility, as estimated by the applicants. For this exercise, though, Civic Economics was asked to evaluate impacts based on the gaming revenue forecast by the Board's own consultants, Wells Gaming and Cummings & Associates. In the Northeast Zone, these estimates were consistently lower than those of the applicants, as illustrated on the following page. Consequently, the economic impact of gaming activities relied on these reduced revenue figures as an input into the model. In the South Central Zone, the opposite is true.

Non-Gaming Revenue Adjustment: The ratio of the average of the Wells and Cummings revenue forecasts were then applied to projected non-gaming revenues. This method assumes that projected non-gaming revenue will change in proportion to the change in projected gaming revenue.

Please note that the charts below employ the *uninflated* forecasts of Wells and Cummings. Those estimates provide the most consistent way to adjust revenue estimates for non-gaming activities. As a result, these charts should not be taken as a summary of gaming revenue forecasts by applicants and consultants.

Chart 9: Non-Gaming Revenue Forecast Adjustments, Phase 1

ADJUSTED REVENUE FORECASTS, 2013					
Based on contractually obligated Phase I development					
KANSAS ENTERTAINMENT, WYANDOTTE (In 2009 Dollars)			**CHISOLM CREEK, SUMNER, (In 2009 Dollars)**		
GAMING REVENUE PROJECTIONS			**GAMING REVENUE PROJECTIONS**		
Estimated gaming revenue: Applicant *	$	220,185,000	Estimated gaming revenue: Applicant *	$	121,139,087
Estimated gaming revenue: Wells	$	146,625,000	Estimated gaming revenue: Wells	$	134,518,000
Estimated gaming revenue: Cummings	$	186,000,000	Estimated gaming revenue: Cummings	$	149,200,000
Average of Wells & Cummings	**$**	**166,312,500**	**Average of Wells & Cummings**	**$**	**141,859,000**
Ratio of Wells/Cummings to Applicant		**0.76**	**Ratio of Wells/Cummings to Applicant**		**1.17**
ADJUSTED NON-GAMING REVENUE PROJECTIONS			**ADJUSTED NON-GAMING REVENUE PROJECTIONS**		
Hotel Revenue	$	-	Hotel Revenue	$	-
Food & Beverage Revenue	$	12,067,164	Food & Beverage Revenue	$	14,703,209.71
Retail Revenue	$	1,544,785	Retail Revenue	$	1,543,977.05
Other Revenue	$	364,825	Other Revenue	$	292,404.59

SOURCE: Applicant submissions, Uninflated projections from Wells Gaming and Cummings & Assoc., Civic Economics

** Inflated by applicant at unknown rate*

Chart 10, Non-Gaming Revenue Forecast Adjustments, Raving Alternative Minimum

ADJUSTED REVENUE FORECASTS, 2013

Based on Raving Alternative Minimum destination casino design

KANSAS ENTERTAINMENT, WYANDOTTE (In 2009 Dollars)				CHISOLM CREEK, SUMNER, (In 2009 Dollars)			
GAMING REVENUE PROJECTIONS				**GAMING REVENUE PROJECTIONS**			
Estimated gaming revenue: Wells		$	178,101,000	Estimated gaming revenue: Wells		$	156,449,000
Estimated gaming revenue: Cummings		$	191,400,000	Estimated gaming revenue: Cummings		$	154,000,000
Average of Wells & Cummings		**$**	**184,750,500**	**Average of Wells & Cummings**		**$**	**155,224,500**
Ratio of Wells/Cummings Alternative Minimum Wells/Cummings Phase I			**1.11**	**Ratio of Wells/Cummings Alternative Minimum Wells/Cummings Phase I**			**1.09**
ADJUSTED NON-GAMING REVENUE PROJECTIONS				**ADJUSTED NON-GAMING REVENUE PROJECTIONS**			
Hotel Revenue	^	$	8,000,000	Hotel Revenue	^	$	3,300,000
Food & Beverage Revenue	^	$	14,000,000	Food & Beverage Revenue	^	$	14,000,000
Retail Revenue	^	$	1,200,000	Retail Revenue	^	$	1,200,000
Other Revenue	^	$	-	Other Revenue	^	$	1,200,000

SOURCE: Raving Consulting, Uninflated projections from Wells Gaming and Cummings & Assoc., Civic Economics

^ Estimated by Raving Consulting

Chart 11, Non-Gaming Revenue Forecast Adjustments, Full Build Out

ADJUSTED REVENUE FORECASTS, 2015							
Based on applicant's proposed full build-out							
KANSAS ENTERTAINMENT, WYANDOTTE (In 2009 Dollars)				**CHISOLM CREEK, SUMNER, (In 2009 Dollars)**			
GAMING REVENUE PROJECTIONS				**GAMING REVENUE PROJECTIONS**			
Estimated gaming revenue: Applicant *		$	326,784,894	Estimated gaming revenue: Applicant *			NA
Estimated gaming revenue: Wells		$	222,699,000	Estimated gaming revenue: Wells		$	180,639,000
Estimated gaming revenue: Cummings		$	225,700,000	Estimated gaming revenue: Cummings		$	166,400,000
Average of Wells & Cummings		**$**	**224,199,500**	**Average of Wells & Cummings**		**$**	**173,519,500**
Ratio of Wells/Cummings to Applicant			**0.69**	**Ratio of Wells/Cummings to Applicant**			**NA**
ADJUSTED NON-GAMING REVENUE PROJECTIONS				**ADJUSTED NON-GAMING REVENUE PROJECTIONS**			
Hotel Revenue	^	$	10,000,000	Hotel Revenue		$	3,688,943
Food & Beverage Revenue	^	$	16,800,000	Food & Beverage Revenue		$	15,650,062
Retail Revenue		$	1,456,231	Retail Revenue		$	1,341,434
Other Revenue		$	-	Other Revenue		$	1,341,434

SOURCE: Applicant Submissions, Raving Consulting, Uninflated Projections from Wells Gaming and Cummings & Assoc., Civic Economics

** Inflated by applicant at unknown rate* *^ Estimated by Raving Consulting*

Total Impacts and Net Impacts**:** The layman might expect an economic impact analysis to quantify the output, employment, and wages of the totality of a proposed facility, which in this case would be built from total projected gaming revenues. However, such an analysis would substantially overstate the true economic impact the facility will have on the State of Kansas as it would, by design, incorporate the impact of money simply redirected from one local activity to another. The true economic impact of a facility is based on a more meaningful number, the net impact.

In this case, net economic impact identifies only that economic activity that is truly new to the jurisdiction. This new activity is made up of two components:

a. **Export Revenue:** This refers to the portion of gaming revenues derived from non-Kansas visitors that would not, absent the proposed casino, have occurred in Kansas. This revenue is truly new to Kansas as out-of-state visitors spend money in the state they would not have otherwise spent.
b. **Import Substitution Revenue:** This refers to the portion of gaming revenues derived from Kansas residents that would, absent the proposed casino, have occurred outside of Kansas. Again, this revenue is truly new to Kansas as Kansas residents repatriate out-of-state casino spending with in-state casino spending.
c. **Redirected Local Spending:** The remainder of gaming revenue not accounted for above *is not included* in the net economic impact analysis, because it reflects casino spending by Kansans that would not otherwise have occurred in any casino. This revenue is not new to Kansas because it represents a diversion of other Kansas household income that previously went to innumerable alternative discretionary activities.

These values were calculated from the reports of Wells and Cummings. The chart on the following page summarizes the calculation of net new gaming revenues used to calculate net economic impact.

Chart 12: Net Gaming Revenues, Phase I

NET GAMING REVENUES IN KANSAS CASINOS, 2013

Based on contractually obligated Phase I development

KANSAS ENTERTAINMENT, WYANDOTTE			CHISHOLM CREEK, SUMNER		
Wells			**Wells**		
Estimated Gaming Revenue	$	146,625,000	Estimated Gaming Revenue	$	134,518,000
Estimated Gaming Export	$	34,139,039	Estimated Gaming Export	$	2,990,255
Estimated Gaming Import Substitution	$	69,780,064	Estimated Gaming Import Substitution	$	68,231,289
Net or New Revenue	$	103,919,103	Net or New Revenue	$	71,221,544
Cummings			**Cummings**		
Estimated Gaming Revenue	$	186,000,000	Estimated Gaming Revenue	$	149,200,000
Estimated Gaming Export	$	49,800,000	Estimated Gaming Export	$	4,800,000
Estimated Gaming Import Substitution	$	76,100,000	Estimated Gaming Import Substitution	$	39,900,000
Net or New Revenue	$	125,900,000	Net or New Revenue	$	44,700,000
Average Net Revenue	**$**	**114,909,552**	**Average Net Revenue**	**$**	**57,960,772**
Net as a % of Gaming Revenue		**69.1%**	**Net as a % of Gaming Revenue**		**43.1%**
New Gaming Spending by Kansans	**$**	**51,402,949**	**New Gaming Spending by Kansans**	**$**	**83,898,228**

SOURCE: Uninflated projections from Wells, Cummings, Applicant Submissions Civic Economics

Chart 13: Net Gaming Revenues, Raving Alternative Minimum

NET GAMING REVENUES IN KANSAS CASINOS, 2013					
Based on Raving Alternative Minimum destination casino design					
KANSAS ENTERTAINMENT, WYANDOTTE			CHISHOLM CREEK, SUMNER		
Wells			**Wells**		
Estimated Gaming Revenue	$	178,101,000	Estimated Gaming Revenue	$	156,449,000
Estimated Gaming Export	$	43,478,721	Estimated Gaming Export	$	4,466,073
Estimated Gaming Import Substitution	$	87,788,024	Estimated Gaming Import Substitution	$	87,883,992
Net or New Revenue	$	131,266,745	Net or New Revenue	$	92,350,065
Cummings			**Cummings**		
Estimated Gaming Revenue	$	191,400,000	Estimated Gaming Revenue	$	154,000,000
Estimated Gaming Export	$	53,400,000	Estimated Gaming Export	$	6,400,000
Estimated Gaming Import Substitution	$	76,700,000	Estimated Gaming Import Substitution	$	41,000,000
Net or New Revenue	$	130,100,000	Net or New Revenue	$	47,400,000
Average Net Revenue	**$**	**130,683,373**	**Average Net Revenue**	**$**	**69,875,033**
Net as a % of Gaming Revenue		**70.7%**	**Net as a % of Gaming Revenue**		**44.7%**
New Gaming Spending by Kansans	**$**	**54,067,128**	**New Gaming Spending by Kansans**	**$**	**85,349,468**

SOURCE: Uninflated projections from Wells, Cummings, Applicant Submissions Civic Economics

Chart 14: Net Gaming Revenues, Full Build Out

NET GAMING REVENUES IN KANSAS CASINOS, 2015

Based on applicant's proposed full build-out

KANSAS ENTERTAINMENT, WYANDOTTE			CHISHOLM CREEK, SUMNER		
Wells			**Wells**		
Estimated Gaming Revenue	$	222,699,000	Estimated Gaming Revenue	$	180,639,000
Estimated Gaming Export	$	56,803,392	Estimated Gaming Export	$	6,844,521
Estimated Gaming Import Substitution	$	112,526,489	Estimated Gaming Import Substitution	$	108,410,942
Net or New Revenue	$	169,329,881	Net or New Revenue	$	115,255,463
Cummings			**Cummings**		
Estimated Gaming Revenue	$	225,700,000	Estimated Gaming Revenue	$	166,400,000
Estimated Gaming Export	$	67,100,000	Estimated Gaming Export	$	8,000,000
Estimated Gaming Import Substitution	$	91,100,000	Estimated Gaming Import Substitution	$	49,800,000
Net or New Revenue	$	158,200,000	Net or New Revenue	$	57,800,000
Average Net Revenue	**$**	**163,764,941**	**Average Net Revenue**	**$**	**86,527,732**
Net as a % of Gaming Revenue		**73.0%**	**Net as a % of Gaming Revenue**		**47.9%**
New Gaming Spending by Kansans	**$**	**60,434,560**	**New Gaming Spending by Kansans**	**$**	**86,991,769**

SOURCE: Uninflated projections from Wells, Cummings, Applicant Submissions Civic Economics

Final Input Modifications: In order to provide fair and equitable treatment of all applicants, Civic Economics determined to run the same model, with the same modifications, for each application. While necessary to the task at hand, this required some modest modifications and adaptations from the data provided by the applicants.

Among these adjustments, those for employment and labor were the most challenging. IMPLAN is designed to estimate wages and employment based on industry averages in the study jurisdiction. However, given the limited and nontraditional form of casino gaming in Kansas currently, it was not surprising that the Local Area Data Set estimated both total employment and wages substantially lower than what was indicated by the applicants.

In order to correct for the inherently high productivity numbers in the model, Civic Economics instead applied the average of both applicants in worker productivity and wages, as shown below. As in 2008, we did not directly apply the wage and employment projections of any applicant.

Chart 15: Wage and Employment Inputs

LABOR COSTS ADJUSTMENTS
Based upon applicants' projections of revenue, employment, and wages

	Kansas Entertainment	Chisholm Creek	Average
Projected Revenue per Employee (FTE)	$ 253,377	$ 201,876	$ 227,627
Applicant Submitted Wages per Employee (FTE)	$ 34,663	$ 46,022	$ 40,343

Source: Applicant Submissions, Civic Economics

Chart 16: Applicant Submission and Model Input

APPLICANT SUBMISSION AND MODEL INPUT CORRESPONDENCE
OPERATION ECONOMIC IMPACT ANALYSIS

Performance Template Category		IMPLAN Category	Notes
Estimated gaming revenue	➡	Other amusement, gambling, and recreation industries	Modified first in terms of total revenue produced as estimated by Wells' and Cummings' reports. Also adjusted to only account for import substitution and export effects.
Hotel revenue	➡	Hotels and motels, inlcuding casino hotels	Modified by Probe Strategic Solutions to represent the average revenues and occupancy rates for the region
Food revenue	➡	Food services and drinking places	Modified to represent the same proportion of gaming revenue the casinos presented before the gaming revenue was modified by Wells and Cummings
Retail revenue	➡	Miscellaneous store retailers	Modified to represent the same proportion of gaming revenue the casinos presented before the gaming revenue was modified by Wells and Cummings
Other revenue	➡	Miscellaneous store retailers	Modified to represent the same proportion of gaming revenue the casinos presented before the gaming revenue was modified by Wells and Cummings

Impact Reporting

The economic impacts are comprised of three separate categories. Each category is analyzed separately from one another in IMPLAN.

- **Economic Output** is the total production or sales derived from the project. For this study, inputs are based upon projected gaming and non-gaming revenues.
- **Employment** is the total number of Kansans employed both full and part time in a given industry.
- **Wages** is the amount of salaries and benefits paid to Kansas employees.

For each of the categories listed above a direct effect, indirect effect, and induced effect has been calculated.

- **Direct** effects capture the initial impact created in Kansas.
- **Indirect** effects are additional impacts derived from businesses providing products or services to the selected industries. This can be restaurants purchasing supplies, the casino hiring a security firm, or the hotel purchasing advertising from a local radio station. Those are all examples of indirect effects.
- **Induced** effects are the result of increased household spending due to the direct and indirect effects. Employees of firms directly or indirectly affected by the project are buying new cars, homes, and groceries locally and this is detailed in the indirect effects.

*Chart 17: **Kansas Entertainment** Operating Impacts Summary Chart*

OPERATING IMPACTS SUMMARY

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY

		Direct	Indirect	Induced	*Total*	Relative Impacts
ECONOMIC OUTPUT		Total revenues associated with construction ($ Millions, Real Dollars)				
Phase I	2013	$ 140,834,088	$ 63,140,122	$ 38,376,599	**$ 242,350,803**	
Raving Minimum	2013	$ 168,148,365	$ 74,655,164	$ 46,216,487	**$ 289,020,011**	
Full Build-Out	2015	$ 223,906,292	$ 99,194,495	$ 61,686,040	**$ 384,786,812**	
EMPLOYMENT		Total workers, including full-time and part-time				
Phase I	2013	888	463	331	***1,681***	
Raving Minimum	2013	1,100	548	398	***2,045***	
Full Build-Out	2015	1,395	686	501	***2,582***	
WAGES		Total wages paid to workers identified above ($ Millions, Real Dollars)				
Phase I	2013	$ 28,877,347	$ 21,359,988	$ 11,660,265	**$ 61,897,602**	
Raving Minimum	2013	$ 35,293,358	$ 25,213,648	$ 14,042,485	**$ 74,549,488**	
Full Build-Out	2015	$ 47,237,104	$ 33,516,193	$ 18,742,613	**$ 99,495,914**	

Source: Applicant Submissions, IMPLAN, Civic Economics

Chart 18: ***Chisholm Creek*** *Operating Impacts Summary Chart*

OPERATING IMPACTS SUMMARY
CHISHOLM CREEK, SUMNER COUNTY

		Direct	**Indirect**	**Induced**	***Total***	**Relative Impacts**
ECONOMIC OUTPUT		Total revenues associated with construction ($ Real Dollars)				
Phase I	2013	$ 81,406,546	$ 35,738,372	$ 22,817,413	**$ 139,962,328**	
Raving Minimum	2013	$ 97,878,637	$ 42,770,767	$ 27,481,926	**$ 168,131,330**	
Full Build-Out	2015	$ 128,444,845	$ 56,272,159	$ 35,970,867	**$ 220,687,876**	
EMPLOYMENT		Total workers, including full-time and part-time				
Phase I	2013	650	258	196	***1,105***	
Raving Minimum	2013	760	311	237	***1,308***	
Full Build-Out	2015	932	385	292	***1,609***	
WAGES		Total wages paid to workers identified above ($ Millions, Real Dollars)				
Phase I	2013	$ 17,980,731	$ 11,890,804	$ 6,932,848	**$ 36,804,383**	
Raving Minimum	2013	$ 21,677,326	$ 14,297,537	$ 8,350,034	**$ 44,324,898**	
Full Build-Out	2015	$ 28,293,773	$ 18,797,968	$ 10,929,402	**$ 58,021,146**	

Source: Applicant Submissions, IMPLAN, Civic Economics

*Charts 19-27: **Kansas Entertainment** Operating Impacts Detail Charts*

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY
NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013
Based on contractually obligated Phase I development

		ECONOMIC OUTPUT (In 2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	771,704	311,928	1,083,633
20	21 Mining (AGG)	0	847,743	498,423	1,346,167
31	22 Utilities (AGG)	0	4,931,178	1,061,828	5,993,006
34	23 Construction (AGG)	0	901,470	283,999	1,185,469
41	31-33 Manufacturing (AGG)	0	6,567,400	3,769,040	10,336,439
319	42 Wholesale Trade (AGG)	0	2,237,276	2,453,410	4,690,686
320	44-45 Retail trade (AGG)	2,086,631	282,103	4,538,253	6,906,987
332	48-49 Transportation & Warehousing (AGG)	0	2,470,711	952,027	3,422,737
341	51 Information (AGG)	0	6,106,012	1,082,783	7,188,794
354	52 Finance & insurance (AGG)	0	6,316,639	3,749,677	10,066,316
360	53 Real estate & rental (AGG)	0	3,265,259	6,437,418	9,702,677
367	54 Professional- scientific & tech svcs (AGG)	0	10,577,816	1,150,148	11,727,963
381	55 Management of companies (AGG)	0	3,879,088	286,578	4,165,666
382	56 Administrative & waste services (AGG)	0	4,306,024	684,520	4,990,542
391	61 Educational svcs (AGG)	0	18,237	449,937	468,174
394	62 Health & social services (AGG)	0	11,963	6,015,640	6,027,603
402	71 Arts- entertainment & recreation (AGG)	125,561,667	802,644	323,980	126,688,285
411	72 Accomodation & food services (AGG)	13,185,790	2,177,982	2,057,908	17,421,680
414	81 Other services (AGG)	0	3,206,349	1,561,114	4,767,463
427	92 Government & non NAICs (AGG)	0	3,462,526	707,989	4,170,515
	Total	**$ 140,834,088**	**$ 63,140,122**	**$ 38,376,599**	**$ 242,350,803**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on contractually obligated Phase I development*					
		TOTAL EMPLOYMENT			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	4.4	1.8	6.2
20	21 Mining (AGG)	0.0	2.1	1.2	3.4
31	22 Utilities (AGG)	0.0	7.3	1.6	8.9
34	23 Construction (AGG)	0.0	8.6	2.3	10.8
41	31-33 Manufacturing (AGG)	0.0	17.7	6.9	24.6
319	42 Wholesale Trade (AGG)	0.0	12.4	13.6	26.0
320	44-45 Retail trade (AGG)	58.7	4.7	77.4	140.8
332	48-49 Transportation & Warehousing (AGG)	0.0	19.8	7.1	27.0
341	51 Information (AGG)	0.0	21.0	3.2	24.2
354	52 Finance & insurance (AGG)	0.0	29.9	17.5	47.3
360	53 Real estate & rental (AGG)	0.0	26.4	15.3	41.7
367	54 Professional- scientific & tech svcs (AGG)	0.0	91.1	10.1	101.2
381	55 Management of companies (AGG)	0.0	17.3	1.3	18.6
382	56 Administrative & waste services (AGG)	0.0	66.9	10.6	77.6
391	61 Educational svcs (AGG)	0.0	0.3	8.2	8.5
394	62 Health & social services (AGG)	0.0	0.1	71.1	71.2
402	71 Arts- entertainment & recreation (AGG)	583.8	28.1	7.5	619.3
411	72 Accomodation & food services (AGG)	245.1	38.8	37.2	321.1
414	81 Other services (AGG)	0.0	38.6	32.2	70.8
427	92 Government & non NAICs (AGG)	0.0	27.8	4.5	32.2
	Total	**887.6**	**463.3**	**330.6**	**1681.4**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on contractually obligated Phase I development*					
		TOTAL LABOR INCOME (2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	53,256	24,000	77,256
20	21 Mining (AGG)	0	182,210	106,540	288,749
31	22 Utilities (AGG)	0	904,582	189,522	1,094,104
34	23 Construction (AGG)	0	380,043	114,650	494,695
41	31-33 Manufacturing (AGG)	0	1,119,898	552,355	1,672,254
319	42 Wholesale Trade (AGG)	0	851,548	933,813	1,785,360
320	44-45 Retail trade (AGG)	999,315	124,061	1,968,313	3,091,689
332	48-49 Transportation & Warehousing (AGG)	0	869,538	321,814	1,191,353
341	51 Information (AGG)	0	1,532,144	228,329	1,760,473
354	52 Finance & insurance (AGG)	0	1,717,356	947,557	2,664,913
360	53 Real estate & rental (AGG)	0	526,960	291,482	818,442
367	54 Professional- scientific & tech svcs (AGG)	0	5,054,635	559,092	5,613,727
381	55 Management of companies (AGG)	0	1,697,147	125,382	1,822,527
382	56 Administrative & waste services (AGG)	0	1,913,762	310,529	2,224,291
391	61 Educational svcs (AGG)	0	7,773	187,932	195,706
394	62 Health & social services (AGG)	0	4,538	3,128,661	3,133,199
402	71 Arts- entertainment & recreation (AGG)	23,735,483	233,991	104,548	24,074,023
411	72 Accomodation & food services (AGG)	4,142,549	688,502	647,569	5,478,621
414	81 Other services (AGG)	0	1,225,143	611,826	1,836,969
427	92 Government & non NAICs (AGG)	0	2,272,902	306,348	2,579,251
	Total	**$ 28,877,347**	**$ 21,359,988**	**$ 11,660,265**	**$ 61,897,602**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY (RAVING MINIMUM) NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on Raving Alternative Minimum destination casino design*					
		ECONOMIC OUTPUT (In 2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	901,280	375,691	1,276,971
20	21 Mining (AGG)	0	1,026,351	600,313	1,626,663
31	22 Utilities (AGG)	0	5,933,864	1,278,927	7,212,790
34	23 Construction (AGG)	0	1,118,811	342,003	1,460,813
41	31-33 Manufacturing (AGG)	0	7,744,194	4,539,381	12,283,574
319	42 Wholesale Trade (AGG)	0	2,605,050	2,955,045	5,560,096
320	44-45 Retail trade (AGG)	1,311,240	330,878	5,464,808	7,106,926
332	48-49 Transportation & Warehousing (AGG)	0	2,878,832	1,146,479	4,025,311
341	51 Information (AGG)	0	7,239,411	1,304,065	8,543,475
354	52 Finance & insurance (AGG)	0	7,404,312	4,515,529	11,919,840
360	53 Real estate & rental (AGG)	0	3,853,261	7,751,888	11,605,149
367	54 Professional- scientific & tech svcs (AGG)	0	12,332,646	1,385,155	13,717,800
381	55 Management of companies (AGG)	0	4,581,129	345,139	4,926,269
382	56 Administrative & waste services (AGG)	0	5,171,785	824,362	5,996,149
391	61 Educational svcs (AGG)	0	19,825	541,755	561,581
394	62 Health & social services (AGG)	0	13,640	7,244,940	7,258,580
402	71 Arts- entertainment & recreation (AGG)	142,797,725	925,354	390,133	144,113,213
411	72 Accomodation & food services (AGG)	24,039,400	2,678,296	2,478,286	29,195,980
414	81 Other services (AGG)	0	3,758,582	1,879,932	5,638,514
427	92 Government & non NAICs (AGG)	0	4,137,662	852,655	4,990,316
	Total	**$ 168,148,365**	**$ 74,655,164**	**$ 46,216,487**	**$ 289,020,011**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY (RAVING MINIMUM) NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on Raving Alternative Minimum destination casino design*					
			TOTAL EMPLOYMENT		
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	5.1	2.2	7.3
20	21 Mining (AGG)	0.0	2.6	1.5	4.1
31	22 Utilities (AGG)	0.0	8.8	1.9	10.7
34	23 Construction (AGG)	0.0	10.6	2.7	13.3
41	31-33 Manufacturing (AGG)	0.0	20.8	8.3	29.2
319	42 Wholesale Trade (AGG)	0.0	14.4	16.4	30.8
320	44-45 Retail trade (AGG)	36.9	5.5	93.2	135.6
332	48-49 Transportation & Warehousing (AGG)	0.0	23.0	8.6	31.6
341	51 Information (AGG)	0.0	24.9	3.9	28.8
354	52 Finance & insurance (AGG)	0.0	35.0	21.0	56.0
360	53 Real estate & rental (AGG)	0.0	31.1	18.4	49.5
367	54 Professional- scientific & tech svcs (AGG)	0.0	106.2	12.2	118.4
381	55 Management of companies (AGG)	0.0	20.5	1.5	22.0
382	56 Administrative & waste services (AGG)	0.0	80.2	12.8	93.0
391	61 Educational svcs (AGG)	0.0	0.3	9.9	10.2
394	62 Health & social services (AGG)	0.0	0.1	85.6	85.7
402	71 Arts- entertainment & recreation (AGG)	663.9	32.3	9.0	705.2
411	72 Accomodation & food services (AGG)	398.8	47.7	44.8	491.3
414	81 Other services (AGG)	0.0	45.3	38.7	84.0
427	92 Government & non NAICs (AGG)	0.0	33.1	5.4	38.4
	Total	**1099.6**	**547.5**	**398.0**	**2045.1**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY (RAVING MINIMUM) NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on Raving Alternative Minimum destination casino design*					
		TOTAL LABOR INCOME (2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	62,125	28,905	91,031
20	21 Mining (AGG)	0	220,587	128,319	348,906
31	22 Utilities (AGG)	0	1,089,304	228,273	1,317,577
34	23 Construction (AGG)	0	471,680	138,067	609,747
41	31-33 Manufacturing (AGG)	0	1,320,561	665,240	1,985,800
319	42 Wholesale Trade (AGG)	0	991,529	1,124,743	2,116,274
320	44-45 Retail trade (AGG)	627,970	145,411	2,370,176	3,143,557
332	48-49 Transportation & Warehousing (AGG)	0	1,008,986	387,544	1,396,529
341	51 Information (AGG)	0	1,815,882	274,989	2,090,871
354	52 Finance & insurance (AGG)	0	2,010,957	1,141,104	3,152,061
360	53 Real estate & rental (AGG)	0	623,097	351,074	974,170
367	54 Professional- scientific & tech svcs (AGG)	0	5,889,598	673,330	6,562,929
381	55 Management of companies (AGG)	0	2,004,298	151,002	2,155,300
382	56 Administrative & waste services (AGG)	0	2,291,427	373,969	2,665,397
391	61 Educational svcs (AGG)	0	8,476	226,282	234,758
394	62 Health & social services (AGG)	0	5,175	3,768,015	3,773,189
402	71 Arts- entertainment & recreation (AGG)	26,993,691	269,994	125,897	27,389,581
411	72 Accomodation & food services (AGG)	7,671,696	846,490	779,851	9,298,036
414	81 Other services (AGG)	0	1,434,098	736,766	2,170,864
427	92 Government & non NAICs (AGG)	0	2,703,974	368,939	3,072,913
	Total	**$ 35,293,358**	**$ 25,213,648**	**$ 14,042,485**	**$ 74,549,488**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2015 *Based on applicant's proposed full build-out*					
		ECONOMIC OUTPUT (In 2015 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	1,186,968	501,403	1,688,371
20	21 Mining (AGG)	0	1,362,951	801,183	2,164,134
31	22 Utilities (AGG)	0	7,882,037	1,706,833	9,588,869
34	23 Construction (AGG)	0	1,487,487	456,492	1,943,978
41	31-33 Manufacturing (AGG)	0	10,242,461	6,058,438	16,300,898
319	42 Wholesale Trade (AGG)	0	3,446,265	3,943,733	7,389,998
320	44-45 Retail trade (AGG)	2,984,352	439,088	7,294,529	10,717,970
332	48-49 Transportation & Warehousing (AGG)	0	3,839,422	1,530,263	5,369,684
341	51 Information (AGG)	0	9,631,978	1,740,480	11,372,458
354	52 Finance & insurance (AGG)	0	9,855,541	6,027,123	15,882,664
360	53 Real estate & rental (AGG)	0	5,131,666	10,347,200	15,478,865
367	54 Professional- scientific & tech svcs (AGG)	0	16,400,527	1,848,748	18,249,275
381	55 Management of companies (AGG)	0	6,080,954	460,648	6,541,602
382	56 Administrative & waste services (AGG)	0	6,883,146	1,100,288	7,983,434
391	61 Educational svcs (AGG)	0	27,881	723,186	751,068
394	62 Health & social services (AGG)	0	18,133	9,669,596	9,687,729
402	71 Arts- entertainment & recreation (AGG)	189,852,700	1,229,584	520,747	191,603,020
411	72 Accomodation & food services (AGG)	31,069,240	3,556,885	3,307,846	37,933,972
414	81 Other services (AGG)	0	4,995,258	2,509,279	7,504,537
427	92 Government & non NAICs (AGG)	0	5,496,264	1,138,023	6,634,287
	Total	**$ 223,906,292**	**$ 99,194,495**	**$ 61,686,040**	**$ 384,786,812**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2015 *Based on applicant's proposed full build-out*					
			TOTAL EMPLOYMENT		
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	6.3	2.7	9.1
20	21 Mining (AGG)	0.0	3.2	1.9	5.1
31	22 Utilities (AGG)	0.0	11.0	2.4	13.4
34	23 Construction (AGG)	0.0	13.3	3.4	16.7
41	31-33 Manufacturing (AGG)	0.0	26.0	10.5	36.5
319	42 Wholesale Trade (AGG)	0.0	18.0	20.6	38.5
320	44-45 Retail trade (AGG)	79.1	6.9	117.3	203.3
332	48-49 Transportation & Warehousing (AGG)	0.0	28.9	10.8	39.7
341	51 Information (AGG)	0.0	31.2	4.9	36.1
354	52 Finance & insurance (AGG)	0.0	43.9	26.5	70.3
360	53 Real estate & rental (AGG)	0.0	39.0	23.2	62.2
367	54 Professional- scientific & tech svcs (AGG)	0.0	133.1	15.3	148.4
381	55 Management of companies (AGG)	0.0	25.6	1.9	27.6
382	56 Administrative & waste services (AGG)	0.0	100.6	16.1	116.7
391	61 Educational svcs (AGG)	0.0	0.4	12.5	12.9
394	62 Health & social services (AGG)	0.0	0.1	107.7	107.8
402	71 Arts- entertainment & recreation (AGG)	832.0	40.5	11.3	883.7
411	72 Accomodation & food services (AGG)	484.3	59.8	56.4	600.4
414	81 Other services (AGG)	0.0	56.7	48.7	105.5
427	92 Government & non NAICs (AGG)	0.0	41.4	6.8	48.2
	Total	**1395.4**	**685.9**	**500.9**	**2582.1**

Source: Applicant Submissions, IMPLAN, Civic Economics

KANSAS ENTERTAINMENT, WYANDOTTE COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2015 *Based on applicant's proposed full build-out*					
		TOTAL LABOR INCOME (2015 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	81,867	38,578	120,447
20	21 Mining (AGG)	0	292,928	171,256	464,185
31	22 Utilities (AGG)	0	1,447,036	304,648	1,751,685
34	23 Construction (AGG)	0	627,113	184,286	811,399
41	31-33 Manufacturing (AGG)	0	1,749,498	887,865	2,637,362
319	42 Wholesale Trade (AGG)	0	1,311,711	1,501,057	2,812,768
320	44-45 Retail trade (AGG)	1,429,245	193,076	3,163,755	4,786,076
332	48-49 Transportation & Warehousing (AGG)	0	1,348,669	517,275	1,865,946
341	51 Information (AGG)	0	2,416,090	367,019	2,783,108
354	52 Finance & insurance (AGG)	0	2,676,725	1,523,080	4,199,805
360	53 Real estate & rental (AGG)	0	829,788	468,540	1,298,328
367	54 Professional- scientific & tech svcs (AGG)	0	7,831,594	898,685	8,730,279
381	55 Management of companies (AGG)	0	2,660,488	201,539	2,862,028
382	56 Administrative & waste services (AGG)	0	3,049,937	499,141	3,549,079
391	61 Educational svcs (AGG)	0	11,887	302,064	313,951
394	62 Health & social services (AGG)	0	6,879	5,029,042	5,035,922
402	71 Arts- entertainment & recreation (AGG)	35,888,703	358,793	168,045	36,415,542
411	72 Accomodation & food services (AGG)	9,919,156	1,124,163	1,040,891	12,084,210
414	81 Other services (AGG)	0	1,905,992	983,423	2,889,415
427	92 Government & non NAICs (AGG)	0	3,591,957	492,423	4,084,380
	Total	**$ 47,237,104**	**$ 33,516,193**	**$ 18,742,613**	**$ 99,495,914**

Source: Applicant Submissions, IMPLAN, Civic Economics

*Charts 28-36: **Chisholm Creek** Operating Impacts Detail Charts*

CHISHOLM CREEK, SUMNER COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on contractually obligated Phase I development*					
		ECONOMIC OUTPUT (In 2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	516,007	185,475	701,481
20	21 Mining (AGG)	0	480,868	296,366	777,234
31	22 Utilities (AGG)	0	2,757,302	631,384	3,388,686
34	23 Construction (AGG)	0	507,032	168,852	675,884
41	31-33 Manufacturing (AGG)	0	4,142,915	2,241,060	6,383,975
319	42 Wholesale Trade (AGG)	0	1,492,197	1,458,852	2,951,048
320	44-45 Retail trade (AGG)	2,006,614	188,173	2,698,112	4,892,899
332	48-49 Transportation & Warehousing (AGG)	0	1,419,754	566,032	1,985,786
341	51 Information (AGG)	0	3,304,546	643,812	3,948,358
354	52 Finance & insurance (AGG)	0	3,438,347	2,229,378	5,667,723
360	53 Real estate & rental (AGG)	0	2,060,346	3,827,271	5,887,617
367	54 Professional- scientific & tech svcs (AGG)	0	5,618,584	683,853	6,302,437
381	55 Management of companies (AGG)	0	2,144,148	170,395	2,314,543
382	56 Administrative & waste services (AGG)	0	2,336,811	406,994	2,743,804
391	61 Educational svcs (AGG)	0	11,022	267,485	278,508
394	62 Health & social services (AGG)	0	6,121	3,576,814	3,582,935
402	71 Arts- entertainment & recreation (AGG)	63,333,736	430,031	192,616	63,956,382
411	72 Accomodation & food services (AGG)	16,066,196	1,203,888	1,223,553	18,493,637
414	81 Other services (AGG)	0	1,736,936	928,154	2,665,090
427	92 Government & non NAICs (AGG)	0	1,943,345	420,956	2,364,301
	Total	**$ 81,406,546**	**$ 35,738,372**	**$ 22,817,413**	**$ 139,962,328**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISHOLM CREEK, SUMNER COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on contractually obligated Phase I development*					
			TOTAL EMPLOYMENT		
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	2.9	1.1	4.0
20	21 Mining (AGG)	0.0	1.2	0.7	1.9
31	22 Utilities (AGG)	0.0	4.1	0.9	5.0
34	23 Construction (AGG)	0.0	4.8	1.3	6.2
41	31-33 Manufacturing (AGG)	0.0	10.9	4.1	15.1
319	42 Wholesale Trade (AGG)	0.0	8.3	8.1	16.3
320	44-45 Retail trade (AGG)	56.4	3.1	46.0	105.6
332	48-49 Transportation & Warehousing (AGG)	0.0	11.2	4.2	15.5
341	51 Information (AGG)	0.0	11.3	1.9	13.2
354	52 Finance & insurance (AGG)	0.0	16.2	10.4	26.6
360	53 Real estate & rental (AGG)	0.0	16.8	9.1	25.9
367	54 Professional- scientific & tech svcs (AGG)	0.0	48.4	6.0	54.5
381	55 Management of companies (AGG)	0.0	9.6	0.8	10.3
382	56 Administrative & waste services (AGG)	0.0	36.3	6.3	42.6
391	61 Educational svcs (AGG)	0.0	0.2	4.9	5.1
394	62 Health & social services (AGG)	0.0	0.0	42.3	42.3
402	71 Arts- entertainment & recreation (AGG)	294.5	15.1	4.4	314.0
411	72 Accomodation & food services (AGG)	298.7	21.4	22.1	342.2
414	81 Other services (AGG)	0.0	20.9	19.1	40.0
427	92 Government & non NAICs (AGG)	0.0	15.5	2.7	18.2
	Total	**649.6**	**258.2**	**196.4**	**1104.5**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISHOLM CREEK, SUMNER COUNTY
NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013
Based on contractually obligated Phase I development

		TOTAL LABOR INCOME (2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	35,273	14,271	49,544
20	21 Mining (AGG)	0	103,363	63,349	166,713
31	22 Utilities (AGG)	0	506,601	112,695	619,295
34	23 Construction (AGG)	0	213,714	68,166	281,879
41	31-33 Manufacturing (AGG)	0	683,293	328,426	1,011,719
319	42 Wholesale Trade (AGG)	0	567,957	555,265	1,123,222
320	44-45 Retail trade (AGG)	960,994	82,806	1,170,215	2,214,015
332	48-49 Transportation & Warehousing (AGG)	0	500,027	191,335	691,362
341	51 Information (AGG)	0	826,744	135,761	962,506
354	52 Finance & insurance (AGG)	0	932,770	563,376	1,496,147
360	53 Real estate & rental (AGG)	0	330,396	173,320	503,716
367	54 Professional- scientific & tech svcs (AGG)	0	2,684,961	332,424	3,017,385
381	55 Management of companies (AGG)	0	938,090	74,549	1,012,639
382	56 Administrative & waste services (AGG)	0	1,039,265	184,631	1,223,895
391	61 Educational svcs (AGG)	0	4,665	111,724	116,389
394	62 Health & social services (AGG)	0	2,322	1,860,261	1,862,583
402	71 Arts- entertainment & recreation (AGG)	11,972,258	125,257	62,157	12,159,672
411	72 Accomodation & food services (AGG)	5,047,480	380,660	385,019	5,813,159
414	81 Other services (AGG)	0	662,130	363,755	1,025,886
427	92 Government & non NAICs (AGG)	0	1,270,511	182,147	1,452,657
	Total	**$ 17,980,731**	**$ 11,890,804**	**$ 6,932,848**	**$ 36,804,383**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISOLM CREEK, SUMNER COUNTY (RAVING MINIMUM) NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on Raving Alternative Minimum destination casino design*					
		ECONOMIC OUTPUT (In 2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	575,645	223,371	799,017
20	21 Mining (AGG)	0	584,450	356,921	941,370
31	22 Utilities (AGG)	0	3,353,150	760,370	4,113,518
34	23 Construction (AGG)	0	630,656	203,377	834,033
41	31-33 Manufacturing (AGG)	0	4,756,828	2,699,016	7,455,844
319	42 Wholesale Trade (AGG)	0	1,674,985	1,756,871	3,431,856
320	44-45 Retail trade (AGG)	2,622,480	213,301	3,249,952	6,085,733
332	48-49 Transportation & Warehousing (AGG)	0	1,685,309	681,761	2,367,071
341	51 Information (AGG)	0	4,028,486	775,384	4,803,871
354	52 Finance & insurance (AGG)	0	4,152,031	2,685,203	6,837,235
360	53 Real estate & rental (AGG)	0	2,395,140	4,609,972	7,005,113
367	54 Professional- scientific & tech svcs (AGG)	0	6,797,169	823,630	7,620,799
381	55 Management of companies (AGG)	0	2,577,686	205,220	2,782,906
382	56 Administrative & waste services (AGG)	0	2,875,638	490,192	3,365,829
391	61 Educational svcs (AGG)	0	13,457	322,214	335,671
394	62 Health & social services (AGG)	0	7,359	4,307,832	4,315,191
402	71 Arts- entertainment & recreation (AGG)	76,352,447	513,707	232,006	77,098,158
411	72 Accomodation & food services (AGG)	18,903,710	1,492,587	1,473,696	21,869,993
414	81 Other services (AGG)	0	2,094,519	1,117,942	3,212,462
427	92 Government & non NAICs (AGG)	0	2,348,666	506,995	2,855,661
	Total	**$ 97,878,637**	**$ 42,770,767**	**$ 27,481,926**	**$ 168,131,330**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISOLM CREEK, SUMNER COUNTY (RAVING MINIMUM) NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on Raving Alternative Minimum destination casino design*					
		TOTAL EMPLOYMENT			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	3.2	1.3	4.5
20	21 Mining (AGG)	0.0	1.5	0.9	2.4
31	22 Utilities (AGG)	0.0	5.0	1.1	6.1
34	23 Construction (AGG)	0.0	6.0	1.6	7.6
41	31-33 Manufacturing (AGG)	0.0	12.6	5.0	17.6
319	42 Wholesale Trade (AGG)	0.0	9.3	9.7	19.0
320	44-45 Retail trade (AGG)	73.7	3.6	55.4	132.8
332	48-49 Transportation & Warehousing (AGG)	0.0	13.4	5.1	18.5
341	51 Information (AGG)	0.0	13.8	2.3	16.1
354	52 Finance & insurance (AGG)	0.0	19.6	12.5	32.1
360	53 Real estate & rental (AGG)	0.0	19.4	11.0	30.4
367	54 Professional- scientific & tech svcs (AGG)	0.0	58.6	7.2	65.8
381	55 Management of companies (AGG)	0.0	11.5	0.9	12.4
382	56 Administrative & waste services (AGG)	0.0	44.6	7.6	52.2
391	61 Educational svcs (AGG)	0.0	0.2	5.9	6.1
394	62 Health & social services (AGG)	0.0	0.1	50.9	50.9
402	71 Arts- entertainment & recreation (AGG)	355.0	18.0	5.3	378.3
411	72 Accomodation & food services (AGG)	331.6	26.6	26.6	384.8
414	81 Other services (AGG)	0.0	25.2	23.0	48.3
427	92 Government & non NAICs (AGG)	0.0	18.8	3.2	21.9
	Total	**760.3**	**311.0**	**236.5**	**1307.8**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISOLM CREEK, SUMNER COUNTY (RAVING MINIMUM) NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2013 *Based on Raving Alternative Minimum destination casino design*					
		TOTAL LABOR INCOME (2013 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	39,456	17,187	56,643
20	21 Mining (AGG)	0	125,620	76,293	201,913
31	22 Utilities (AGG)	0	616,177	135,717	751,893
34	23 Construction (AGG)	0	265,843	82,103	347,946
41	31-33 Manufacturing (AGG)	0	794,187	395,543	1,189,731
319	42 Wholesale Trade (AGG)	0	637,529	668,697	1,306,227
320	44-45 Retail trade (AGG)	1,255,940	93,895	1,409,557	2,759,391
332	48-49 Transportation & Warehousing (AGG)	0	594,099	230,457	824,556
341	51 Information (AGG)	0	1,008,591	163,508	1,172,098
354	52 Finance & insurance (AGG)	0	1,126,291	678,559	1,804,850
360	53 Real estate & rental (AGG)	0	385,267	208,729	593,996
367	54 Professional- scientific & tech svcs (AGG)	0	3,246,106	400,370	3,646,475
381	55 Management of companies (AGG)	0	1,127,768	89,786	1,217,554
382	56 Administrative & waste services (AGG)	0	1,275,880	222,373	1,498,253
391	61 Educational svcs (AGG)	0	5,693	134,585	140,278
394	62 Health & social services (AGG)	0	2,792	2,240,450	2,243,242
402	71 Arts- entertainment & recreation (AGG)	14,433,244	149,790	74,869	14,657,902
411	72 Accomodation & food services (AGG)	5,988,142	471,830	463,733	6,923,707
414	81 Other services (AGG)	0	798,199	438,140	1,236,339
427	92 Government & non NAICs (AGG)	0	1,532,525	219,378	1,751,904
	Total	**$ 21,677,326**	**$ 14,297,537**	**$ 8,350,034**	**$ 44,324,898**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISOLM CREEK, SUMNER COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2015 *Based on applicant's proposed full build-out*					
		ECONOMIC OUTPUT (In 2015 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	766,007	292,395	1,058,403
20	21 Mining (AGG)	0	769,272	467,215	1,236,487
31	22 Utilities (AGG)	0	4,411,804	995,362	5,407,166
34	23 Construction (AGG)	0	828,559	266,188	1,094,747
41	31-33 Manufacturing (AGG)	0	6,297,880	3,532,969	9,830,849
319	42 Wholesale Trade (AGG)	0	2,217,932	2,299,846	4,517,778
320	44-45 Retail trade (AGG)	2,604,054	281,458	4,253,460	7,138,973
332	48-49 Transportation & Warehousing (AGG)	0	2,207,998	892,327	3,100,326
341	51 Information (AGG)	0	5,288,695	1,014,951	6,303,646
354	52 Finance & insurance (AGG)	0	5,449,104	3,514,532	8,963,636
360	53 Real estate & rental (AGG)	0	3,146,103	6,033,537	9,179,641
367	54 Professional- scientific & tech svcs (AGG)	0	8,929,167	1,078,072	10,007,239
381	55 Management of companies (AGG)	0	3,394,878	268,623	3,663,500
382	56 Administrative & waste services (AGG)	0	3,773,221	641,611	4,414,832
391	61 Educational svcs (AGG)	0	16,653	421,678	438,331
394	62 Health & social services (AGG)	0	9,672	5,638,739	5,648,411
402	71 Arts- entertainment & recreation (AGG)	100,311,595	675,686	303,651	101,290,935
411	72 Accomodation & food services (AGG)	25,529,196	1,963,623	1,928,889	29,421,708
414	81 Other services (AGG)	0	2,753,999	1,463,198	4,217,198
427	92 Government & non NAICs (AGG)	0	3,090,445	663,624	3,754,068
	Total	**$ 128,444,845**	**$ 56,272,159**	**$ 35,970,867**	**$ 220,687,876**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISOLM CREEK, SUMNER COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2015 *Based on applicant's proposed full build-out*					
		TOTAL EMPLOYMENT			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0.0	4.1	1.6	5.7
20	21 Mining (AGG)	0.0	1.8	1.1	2.9
31	22 Utilities (AGG)	0.0	6.2	1.4	7.6
34	23 Construction (AGG)	0.0	7.4	2.0	9.4
41	31-33 Manufacturing (AGG)	0.0	15.8	6.1	21.9
319	42 Wholesale Trade (AGG)	0.0	11.6	12.0	23.6
320	44-45 Retail trade (AGG)	69.0	4.4	68.4	141.8
332	48-49 Transportation & Warehousing (AGG)	0.0	16.5	6.3	22.8
341	51 Information (AGG)	0.0	17.1	2.9	19.9
354	52 Finance & insurance (AGG)	0.0	24.2	15.4	39.6
360	53 Real estate & rental (AGG)	0.0	24.1	13.5	37.6
367	54 Professional- scientific & tech svcs (AGG)	0.0	72.6	8.9	81.5
381	55 Management of companies (AGG)	0.0	14.3	1.1	15.4
382	56 Administrative & waste services (AGG)	0.0	55.2	9.4	64.5
391	61 Educational svcs (AGG)	0.0	0.3	7.3	7.5
394	62 Health & social services (AGG)	0.0	0.1	62.8	62.9
402	71 Arts- entertainment & recreation (AGG)	439.6	22.3	6.6	468.5
411	72 Accomodation & food services (AGG)	423.0	32.9	32.9	488.8
414	81 Other services (AGG)	0.0	31.2	28.4	59.7
427	92 Government & non NAICs (AGG)	0.0	23.3	3.9	27.2
	Total	**931.6**	**385.4**	**292.0**	**1608.8**

Source: Applicant Submissions, IMPLAN, Civic Economics

CHISOLM CREEK, SUMNER COUNTY NET OPERATION IMPACTS IN THE STATE OF KANSAS, 2015 *Based on applicant's proposed full build-out*					
		TOTAL LABOR INCOME (2015 Dollars)			
Code	**Sector**	**Direct**	**Indirect**	**Induced**	**Total**
1	11 Ag, Forestry, Fish & Hunting (AGG)	0	52,469	22,497	74,966
20	21 Mining (AGG)	0	165,345	99,869	265,215
31	22 Utilities (AGG)	0	810,652	177,659	988,313
34	23 Construction (AGG)	0	349,265	107,460	456,725
41	31-33 Manufacturing (AGG)	0	1,049,233	517,754	1,566,986
319	42 Wholesale Trade (AGG)	0	844,185	875,363	1,719,548
320	44-45 Retail trade (AGG)	1,247,116	123,823	1,844,794	3,215,732
332	48-49 Transportation & Warehousing (AGG)	0	776,311	301,634	1,077,945
341	51 Information (AGG)	0	1,324,015	214,024	1,538,039
354	52 Finance & insurance (AGG)	0	1,478,101	888,142	2,366,244
360	53 Real estate & rental (AGG)	0	506,039	273,234	779,273
367	54 Professional- scientific & tech svcs (AGG)	0	4,264,778	524,056	4,788,834
381	55 Management of companies (AGG)	0	1,485,299	117,525	1,602,824
382	56 Administrative & waste services (AGG)	0	1,674,015	291,064	1,965,080
391	61 Educational svcs (AGG)	0	7,064	176,128	183,191
394	62 Health & social services (AGG)	0	3,669	2,932,645	2,936,314
402	71 Arts- entertainment & recreation (AGG)	18,962,349	196,994	97,989	19,257,332
411	72 Accomodation & food services (AGG)	8,084,308	620,741	606,970	9,312,019
414	81 Other services (AGG)	0	1,049,489	573,445	1,622,934
427	92 Government & non NAICs (AGG)	0	2,016,483	287,148	2,303,631
	Total	**$ 28,293,773**	**$ 18,797,968**	**$ 10,929,402**	**$ 58,021,146**

Source: Applicant Submissions, IMPLAN, Civic Economics

NON-GAMING COMPETITIVE IMPACTS

Civic Economics was asked to address the issue of cannibalization of existing business with regard to the non-gaming amenities at the proposed gaming facilities.

Gaming Impact on Household Spending

Before delving into the specific amenities offered by each applicant, a note about gaming revenues is appropriate. In the discussion of Net Economic Impact above, the significant values of Import Substitution and Export Revenues were described and calculated. In addition, it was suggested that the remaining gaming revenues would represent new gaming spending in lieu of other household spending choices. The additional gaming spending beyond Import Substitution and Export Revenue in the each zone is as shown on Chart 37.

It is beyond the scope of this study to evaluate the choices Kansas residents will make in determining how to make room in the household budget for additional gaming spending. However, the general principal is that in a typical household increased gaming spending will be diverted from other leisure and entertainment pursuits.

Chart 37: Induced Additional Gambling Spending by Kansans

NEW GAMING SPENDING BY KANSANS, 2013

Based on contractually obligated Phase I development

	KANSAS ENTERTAINMENT, WYANDOTTE	CHISHOLM CREEK, SUMNER
New Gaming Spend as a % of Gaming Revenue	30.9%	56.9%
New Gaming Spend by Kansans (In Millions)	$ 56.2	$ 91.7

NEW GAMING SPENDING BY KANSANS, 2013

Based on Raving Alternative Minimum destination casino design

	KANSAS ENTERTAINMENT, WYANDOTTE	CHISHOLM CREEK, SUMNER
New Gaming Spend as a % of Gaming Revenue	29.3%	55.3%
New Gaming Spend by Kansans (In Millions)	$ 59.1	$ 93.3

NEW GAMING SPENDING BY KANSANS, 2015

Based on applicant's proposed full build-out

	KANSAS ENTERTAINMENT, WYANDOTTE	CHISHOLM CREEK, SUMNER
New Gaming Spend as a % of Gaming Revenue	27.0%	52.1%
New Gaming Spend by Kansans (In Millions)	$ 70.1	$ 100.8

SOURCE: Wells, Cummings, Civic Economics

Non-Gaming Competition for Non-Gaming Dollars

For this analysis, Civic Economics was asked to focus on the competition between existing businesses in the area of a proposed gaming facility and the non-gaming amenities proposed for development along with the gaming facility. In 2008, the various proposals included a wide range of non-gaming activities including golf courses, hunting preserves, hotel and conference facilities, and numerous dining, drinking, and entertainment venues as part of the proposal package.

The current proposals, by contrast, include rather limited activities. Each includes the traditional casino buffet, snack bar, and steakhouse dining selection, with bars provided on the casino floor. **Kansas Entertainment** does propose to develop a later phase entertainment venue of 60,000 square feet, but rather than an extensive district as proposed in 2008, this facility appears to be simply a dual use convention space associated with the hotel.

Civic Economics has reviewed 2009 Claritas data for eating and drinking places in both the Kansas City and Wichita metropolitan areas and compared the Raving Consulting sales forecasts for each proposal. In neither case do we find cause for alarm by existing food and beverage businesses. Estimated food and beverage sales for the **Kansas Entertainment** proposal range from 1-1.5% of total sales on the Kansas side of the KC metropolitan area. Estimated food and beverage sales for **Chisholm Creek** range from 2-2.2% of total sales in the Wichita area.