

Gaming Update

October 25, 2023



Sports Betting Update



## **Approved Operators**

Sports Betting Operator	Date of First Wager
Betfair Interactive US, LLC (d/b/a FanDuel)	January 20, 2021
Crown Virginia Gaming, LLC (Draft Kings)	January 24, 2021
BetMGM, LLC	January 27, 2021
Rivers Portsmouth Gaming, LLC d/b/a Rivers Casino Portsmouth	January 27, 2021
Caesars Virginia, LLC	February 3, 2021
WSI, US LLC	March 9, 2021
Unibet Interactive, Inc.	April 28, 2021
Penn Sports Interactive, LLC Bally Interactive	August 10, 2021 November 24, 2021
Colonial Downs Group, LLC	December 15, 2021
HR Bristol, LLC	March 31, 2022
VHL, VA LLC a/k/a 888	May 9, 2022
Digital Gaming Corporation VA, LLC	May 17, 2022
DC Sports Facilites Entertainment, LLC	December 19, 2022
Hillside (Virginia), LLC a/k/a Bet365	January 31, 2023
Betr VA, LLC	September 6, 2023
PlayLive Virginia, LLC	October 13, 2023

### WSI US, LLC Update

- WSI US, LLC (Wynn) decided to close their non-retail sports books and announced its immediate closure on August 11,
   2023.
- All bets have been settled.

- Notifications were sent to patrons to withdraw their funds by October 11, 2023.
- Patrons with remaining funds will be mailed checks.
- Continuing to work on the final remediation plan with Wynn.

### **Sports Betting Renewals**

#### First Four-Month Period in CY 2024

• Eight Permit Holders are up for renewal:

Permit Holder	<b>Expiration Date</b>	
Betfair Interactive (FanDuel) in conjunction with the Commanders	January 19, 2024	
Crown Virginia Gaming, LLC (DraftKings)	January 23, 2024	
BetMGM, LLC	January 23, 2024	
Rivers Portsmouth Gaming, LLC	January 25, 2024	
Caesars Virginia, LLC	January 26, 2024	
Bally's Interactive, LLC	March 14, 2024	
Penn Sports Interactive, LLC	March 14, 2024	
Unibet Interactive, Inc	April 20, 2024	

### **Sports Betting Renewals**

First Four-Month Period in CY 2024

Eight Suppliers are up for renewal:

Supplier	<b>Expiration Date</b>	
IGT	January 19, 2024	
GeoComply	January 19, 2024	
Sports Information Services, Ltd	January 25, 2024	
RSI, VA LLC	January 25, 2024	
American Wagering	January 26, 2024	
Neogames Solutions	January 26, 2024	
NYX Digital Gaming (USA), LLC	March 3, 2024	
Boyd Gaming	March 21, 2024	

### **Sports Betting Renewals**

First Four-Month Period in CY 2024

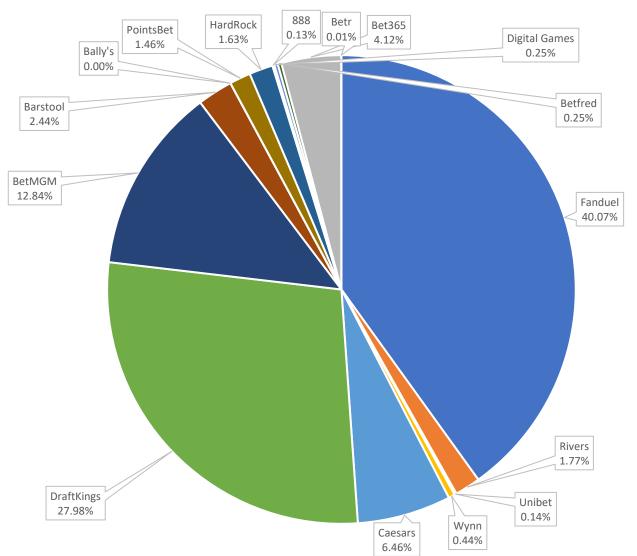
Vendor renewals:

• 78 Vendors are up for renewal during the first four months of calendar year 2024.

• Failure to renew their registration will result in them not being able to conduct business in the Commonwealth with licensed permit holders.

### **Market Share by Operator**

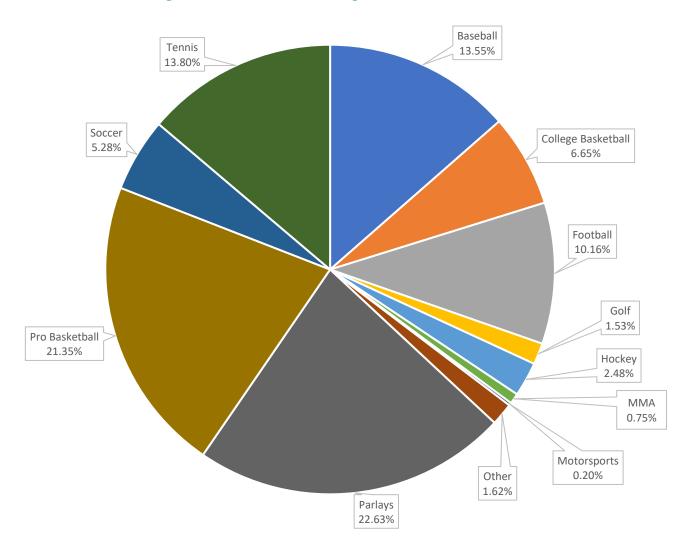
January 2023 to September 2023





## **Total Wagers by Sport**

January 2023 to September 2023





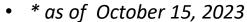


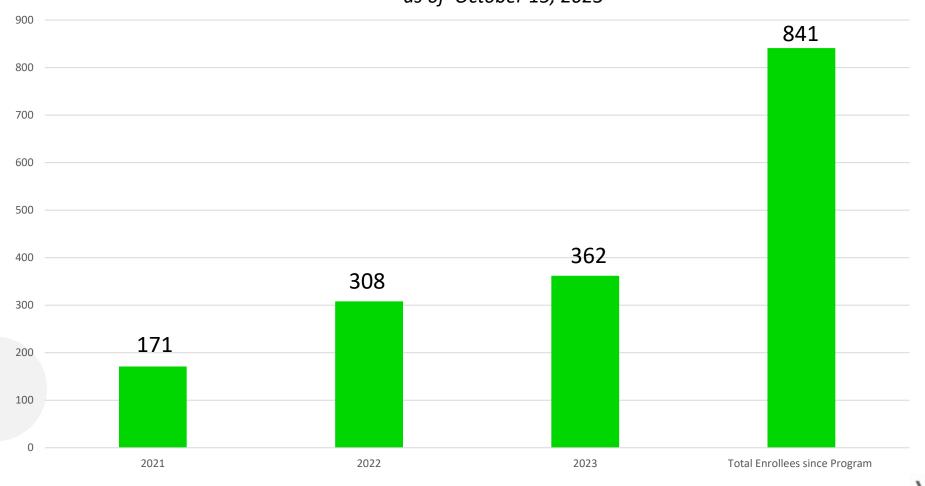
Voluntary Exclusion Program Update



### **Voluntary Exclusion Program**

#### **Total Program Enrollment - 841**



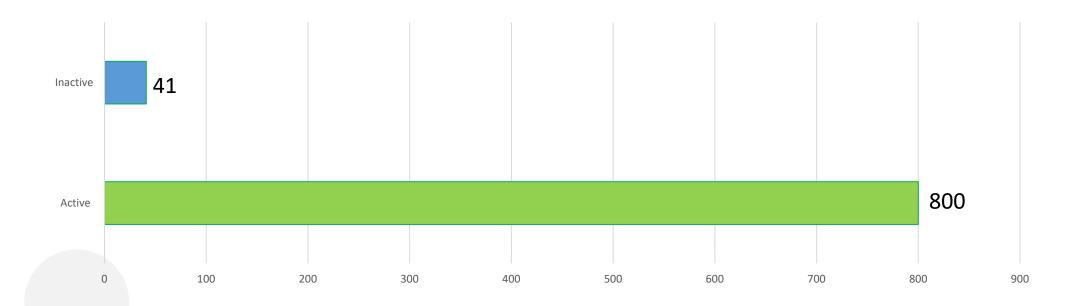




### **Voluntary Exclusion Program**

Active and Inactive Exclusion Period based on Total Enrollment – 841

• Data as of October 15, 2023

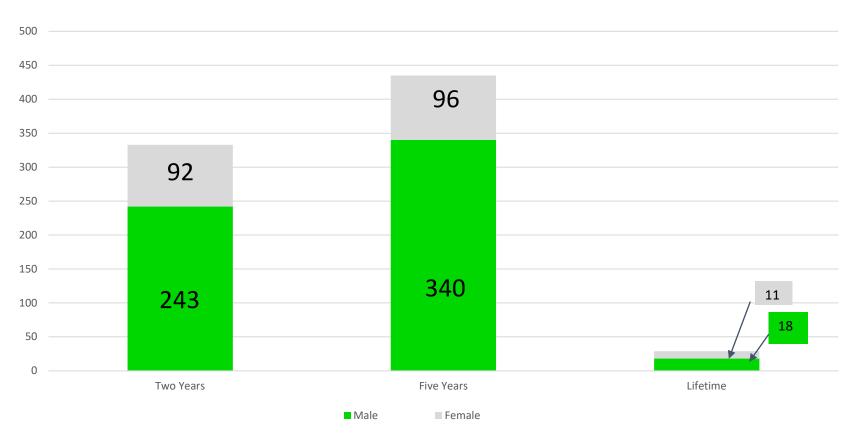


## **Voluntary Exclusion Program**

Exclusion Period Breakdown by Gender (as of October 15, 2023)

Total = 800

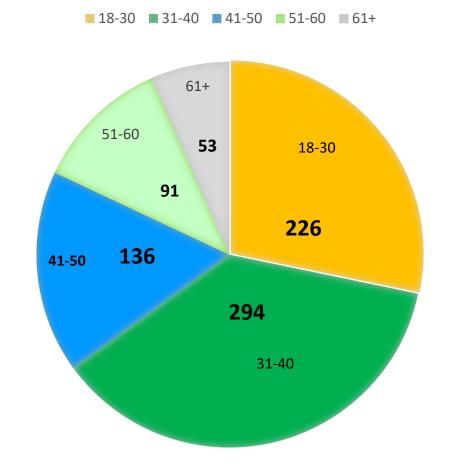
Two, Five Years and Lifetime



## Voluntary Exclusion Enrollees By Age

Data as of October 15,2023

Total = 800





Casino Update



### Service Permits Issued as of 10/18/2023

#### **Service Permits**

Type	# Approved as of October 18, 2023	Increase since July 2023	% Increase since July 2023
Gaming and Non- Gaming	4,850	1,000	26%
Vendors	509	71	16%





### Supplier Permits Issued as of 10/18/2023

#### **Supplier Permits**

Type	# Approved as of October 18, 2023	Increase since July 2023	% Increase since July 2023
Key Manager	113	21	23%
Manufacturer	21	1	.05%

The number of manufacturers in the gaming industry is limited; therefore, there has been no additional manufacturer applications received.









### **Hard Rock Casino Bristol**

Within the last quarter, approved the receipt of 4 new games and approved 10 change requests

which involved a total of 174 games.

Meeting monthly with Hard Rock to prepare for the opening of the permanent casino next summer.



### **Rivers Casino Portsmouth**

Continuing to work with Rivers on day-to-day operations.

During the last quarter, approved the receipt of 15 new games and approved 11 change requests involving 117 total games.



### **Caesars Danville**

During the last quarter, approved the addition of 70 new games and approved 20 change requests involving 391 games.





VA Lottery October 25, 2023







# 100,000 Loyalty Members























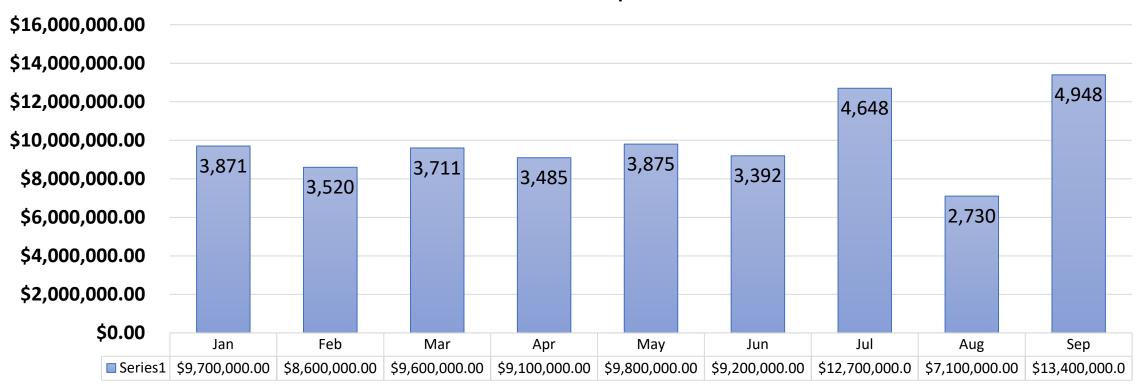
# Slot Jackpots Jan-Sep 2023



Total: 34,180

Amount: \$89,200,000

#### **2023 Slot Jackpots**

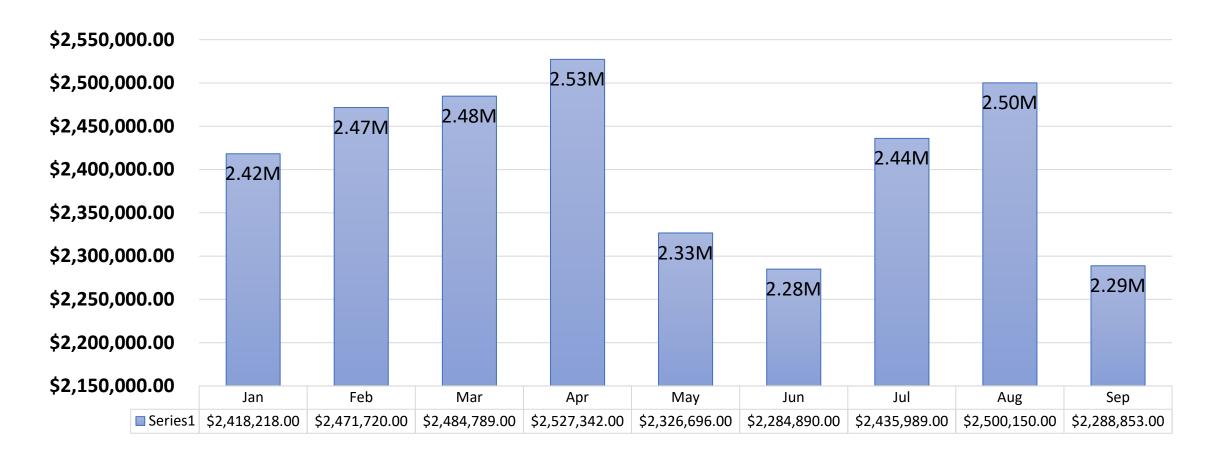




# Gaming Taxes Jan-Sep 2023



Amount: \$21,738,647





## **Big Winners!!!**



#### \$148,897.50 Slot Jackpot Winner!



#### \$200K Summer Silverado Giveaway Winner!



#### \$228,602 Table Games Jackpot Winner!







#### **Q3 TDR Donations**

Bristol Public Library
\$6,897.75

Imagination Library of
Bristol
\$6.897.75





#### **August**

Feeding Southwest Virginia

\$16,290.25

September

**Morrison School** 

\$15,283.00



#### DID YOU KNOW

Total Q3 TDR Contributions: \$45,368.75 Total 2023 TDR Contributions: \$142,109.05

It costs approximately \$50,000 a month to operate the TDR. 100% of your contributions benefit our community non-profits.

#### **Team Member Dining Room Donations**

- January: \$17,728 to Margaret B. Mitchell Clinic
- February: \$10,000 to YMCA Little Floaters Program
- March: \$10,000 to Abuse Alternatives
- April: \$10,000 to Branch House
- May: \$7,939 to VFW and \$7,939 to Disabled American Veterans
- June: \$7,322 to Alzheimer's Association and \$7,322 to Mountain Empire Older Citizens
- July: \$6,897 to Bristol Library and \$6,897 to Imagination Library
- August: \$16,290.25 to Feeding Southwest VA
- September: \$15,283 to Morrison School
- October: American Cancer Society
- November: Speedway in Lights Children's Charities
- December: Kari's Heart





#### TITO Boxes – Guest Donations \$19,195 (Jan-Aug)

- Jan & Feb: \$5,770 to American Red Cross
- March & April: \$5,118 to Frontier Health
- May & Jun: \$4,209 to The United Way of Bristol
- Jul & Aug: \$4,098 to Bristol Fire Department
- Sep & Oct: American Cancer Society
- Nov & Dec: Feeding Southwest VA







#### Walk to End Alzheimer's



#### **Bristol Virginia Police Department's Trunk or Treat**







#### **Proud Sponsor of Tri Pride Parade & Festival**









#### FRIENDS Buddy Walk – Down Syndrome Association



#### \$4,098.98 to the Bristol, Virginia Fire Department







### **Bristol Regional Speech and Hearing Center's Run Your Mouth 5K**



### Domestic Violence Awareness Month "chalking it up" in the Team Member parking lot







#### \$6,897.75 to Imagination Library of Bristol



\$6,897.75 to the Bristol Public Library







#### **Proud sponsor of the Tri-Cities 9/11 Memorial Stair Climb**







**BRISTOL** 

## Love All Serve All - All is One







BRISTOL

Want to be a part of our next Culture Club volunteer opportunity?

Feeding Southwest Virginia needs 8 volunteers
(for each shift) to pack backpacks on
Monday, September 18th.
You may volunteer 9 am - noon or 1 pm - 4 pm.

This is for team members only. Please do not register friends and family. Because this is a volunteer event, you will not be paid for participating. Please make sure that this event does not conflict with your schedule before you sign up to participate.

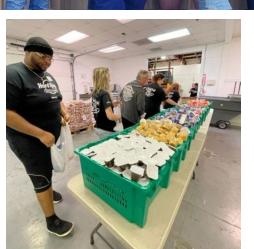
Please wear the black "I'm With The Band" shirt or purple "Culture Club" shirt. No new shirts will be given for this activity unless this is your first volunteer event.



To sign up, scan the QR code or click <u>HERE!</u>













**BRISTOL** 

# PINKTOBER Events



Real Men Wear Pink

- PINKTOBER Merch
- Signature Cocktail
- Blackjack for a Cause
- Making Strides Against Breast Cancer Walk















WHERE: WALK WILL BEGIN AT BOYCE COX FIELD AND END AT HARD ROCK BRISTOL



# PINKTOBER Events

### BRISTOL -CASINO-

**FUTURE HOME OF HARD ROCK** 

**BRISTOL** 

We are kicking off Pinktober in a big way! Wednesday, October 4th is the American Cancer Society's "Power of Pink" day. Team Members are invited to wear their property "Race for a Cure" shirts every Wednesday & Saturday in October, with department approval.

This is also a great time to share our Pinktober property hittatives with our guests, including our Making Strides Against Breast Cancer FLAMINGO WALK on Saturday, October 21st! Guests can scan the QR code on the sign outside Bristol Bar to join our team. If you or a loved one would like to sign up and

the Hard Rock Bristol team, please use the QR

If you have not purchased your shirt or other accessories, you can do so through the Pinktober Tshirt and Accessories form on RedeApp or by

scanning the QR code















# Team Member Engagement

# BRISTOL -CASINO-

OPERATIONS. WHILE YOU'RE THERE, GRAB A SNACK AND REGISTER TO WIN SOME AWESOME PRIZES!

#### TDR







**All In** with Allie and **Talking Money** with Mark

Freddie Mercury Day: \$1 Mustaches & Queen Costumes

\$500 Donated to the Mercury Foundation

**Hispanic Heritage** Month Virtual Event

**NFL Jersey** Days every Sunday

TM ENGAGEMENT SURVEY

AIDs and HIV through The Mercury Phoenix Trust.









# Other Team Members Events



- School Supply Drive
- Wellness Fair with flu shots and massages
- Mammograms
- Jet Dental (free cleanings)

- Biometric Screenings
- Social Identity Training
- Anti-Human Trafficking Training
- DE&I: "The Look" Unconscious Bias Voluntary Training











Biometric Screenings
Biometric Screenings are free and help you earn insurance discounts. Stay tuned for more information!

Wellness Fridays

Coming in October

Wellness Fair

We will have insurance vendors here to explain benefits including medical, dental

vision, and EAP. Local Healthcare providers will be available to answer questions and Flu Shots will be given. Make plans to stop by, ask guestions, and have a



Please see Human Resources if you have any questions.



## **Hard Rock Property**



#### **Luxury Hotel**

303 rooms plus feature Body Rock, Rock Spa, and a featured Indoor/Outdoor Pool

World Class Smoking & Non-Smoking Gaming Areas
Over 1,500 Slots Machines & 75 Table Games
Hard Rock Sportsbook

#### Dining venues to include:

Council Oak Steakhouse Hard Rock Cafe YouYu Noodle Bar Large Food Hall

#### State of the Art Entertainment Venue

Hard Rock Live Venue 2,000 seats

#### Retail

Rock Shop and Unity Venue Player's Club



1,500 Slots

303 Hotel Rooms 75 Table Games

2,000 seat Entertainment Venue Sportsbook

Body Rock & Rock Spa

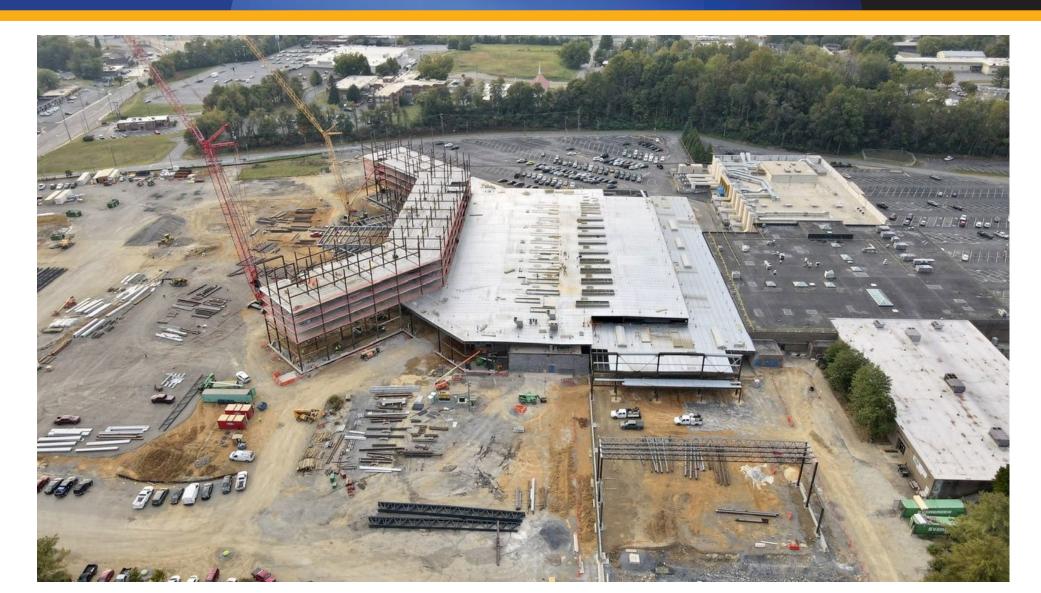






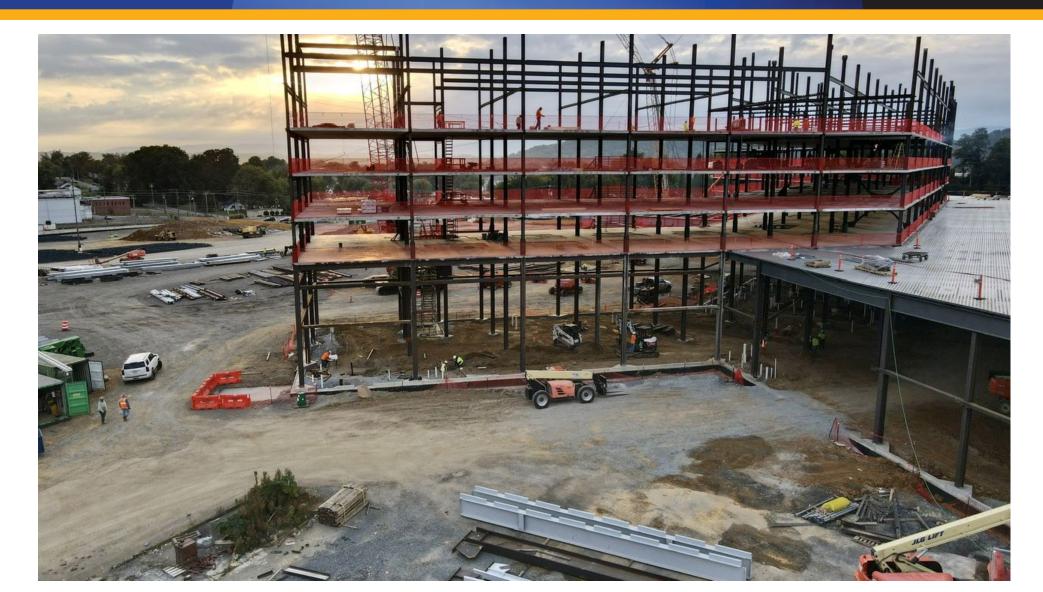






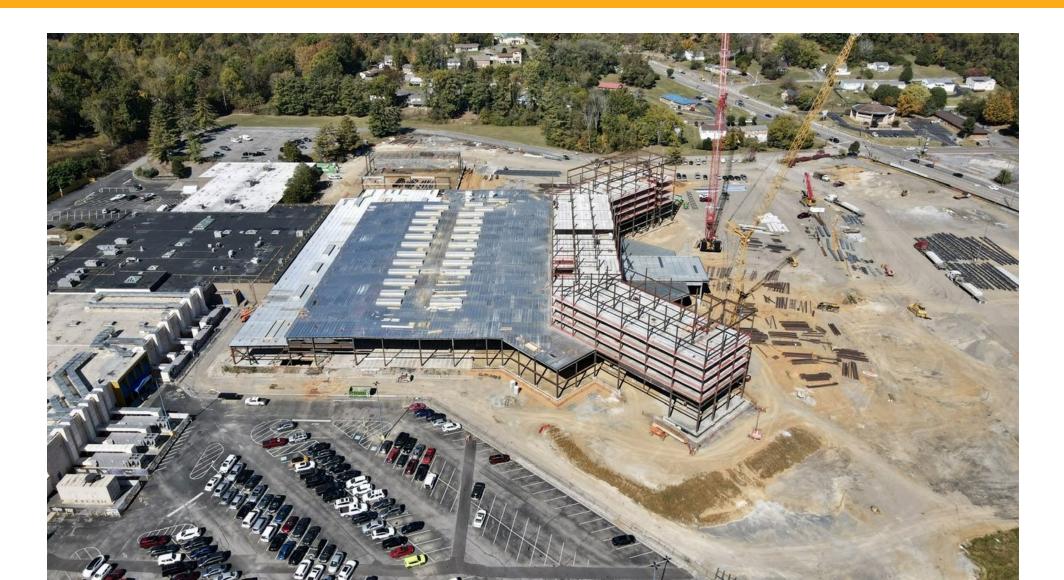






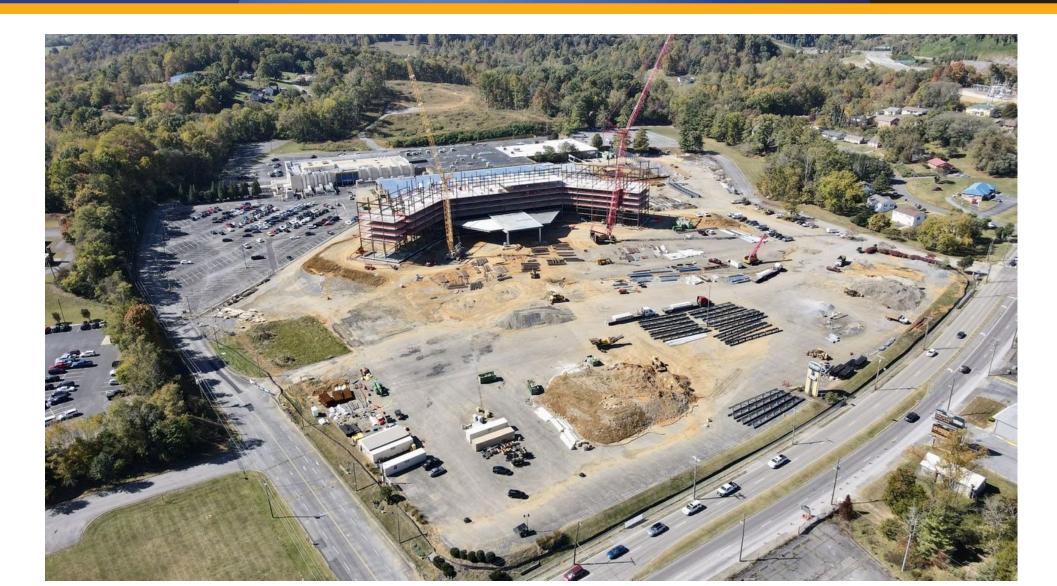














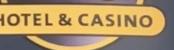


**BRISTOL** 



BRISTOL







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BRISTOL





# Thank You!



# Q3 FALL UPDATE

OCTOBER 2023

### A STRONG ECONOMIC ENGINE



#### **JAN. 23 - AUG. 31, 2023**

- \$165.2M Gaming Revenue Produced
- \$6.7M Food & Beverage Revenue
- \$244.5 Entertainment Admissions Revenue
- \$29.7M State Taxes Generated
- \$9.8M Local Taxes Generated
- \$1.8M Real Estate Taxes Generated
- \$620.7K Personal Property Taxes Generated
- \$22.2K Admissions Taxes Generated
- \$451K Building Permit Cost
- \$38K Business License Cost



"Rivers Casino has provided the City of Portsmouth with a much-needed economic boost."

- Brian Donahue, Portsmouth Economic Development Director, Interview with COVA Biz Magazine

### A STRONG ECONOMIC ENGINE



#### **GUEST ORIGINATION**

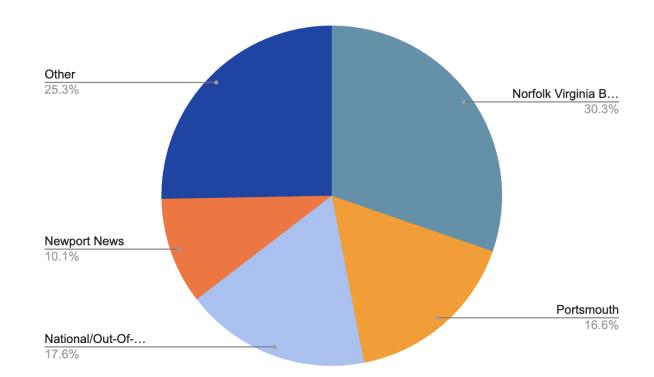
• 30.3% Norfolk, VA Beach, Chesapeake

• 16.64% Portsmouth

• 17.64% National/Out-Of-Market

• 10.13% Newport News

• 25.29% Other



**Guests of Rivers Casino Portsmouth have visited from ALL 50 states!** 

### A STRONG ECONOMIC ENGINE



#### **EXPENDITURES & DIVERSITY SPENDING**

- 183 Virginia-Based Vendors & Suppliers
- \$9.5M In Expenditures To Local Vendors & Suppliers To-Date Including:
  - \$862K In Expenditures to Women & Minority Owned Businesses\*
  - \$3.1M In Expenditures To Portsmouth-Based Businesses



"As a proud member of the Portsmouth and Hampton Roads community, we've made it our priority to work with local businesses, vendors and suppliers."

- Roy Corby, General Manager, Rivers Casino Portsmouth

### A GREAT PLACE TO WORK



#### **RIVERS CASINO PORTSMOUTH CREATED 1300 JOBS**

#### **1086 TEAM MEMBERS**

- 34.1% Portsmouth Residents
- 53.95% Female
- 63% Minority

#### 237 LEADERSHIP TEAM MEMBERS

- 49.37% Female
- 49.7% Minority
- 28.69% of Leadership Team Promoted From Within
- 48.53% of Promotions to Female Team Members







VOLUNTEERISM, BOARD SERVICE, DONATION DRIVES, IN-KIND CONTRIBUTIONS, CORPORATE GIVING



#### **OVER \$775K DONATED THROUGH CORPORATE GIVING**

#### 874.5 Volunteer Hours Served

City of Portsmouth's Clean Up Initiative, Chesapeake Regional Healthcare's Brahaha Awards Show and Auction, Community Outreach Coalition's Breast Cancer Awareness Walk, Bon Secours Community Health Hub, Roc Solid Foundation, and more.

#### \$55K Raised Through Donation Drives

Portsmouth Museums Foundation, HER Shelter,
 Foodbank of Southeastern Virginia and the Eastern
 Shore, Portsmouth American Legion, and more.

#### \$78K+ Given Through In-Kind Donations

School supplies, food, clothing, hygiene items,
 equipment, meeting and event space, and more.







#### **RIVERS GIVES DAY OF SERVICE 2023**

On Oct. 17, Team Members at Rivers Casino Portsmouth joined Team Members across all Rivers Casino locations to quintuple the community impact in each of our five operating markets through volunteerism and on-site activities.

The inaugural "Rivers Gives Day of Service 2023" focused on health and human services. Rivers Casino Portsmouth Team Members participated in a supply drive in support of Bon Secours Community Health Hub, and volunteered at the warehouse for Roc Solid Foundation. Additionally, charitable donations were made to both organizations and the American Cancer Society.









## PORTSMOUTH IS WINNING

### PORTSMOUTH IS WINNING



#### **HOSTING COMMUNITY EVENTS IS A WIN-WIN – FOR THE CASINO AND THE COMMUNITY**

#### **Recent hosted events included:**

- Hampton Roads Workforce Council held their 2023 Workforce Innovation Awards hosted by Mayor Shannon Glover, this event was a tribute to local workforce innovators.
- For the first time, the Military Economic Development Advisory Committee (MEDAC) held their joint meeting for Norfolk, Portsmouth and Virginia Beach in Portsmouth.







### PORTSMOUTH IS WINNING



#### A DIVERSE ENTERTAINMENT LINEUP

Rivers Casino Portsmouth has welcomed headliners, hitmakers and unforgettable performances to The Event Center, and regularly hosts the best local bands and events in the Sound Bar.









## THANK YOU...

TO OUR TEAM MEMBERS, GUESTS, COMMUNITY, AND THE VIRGINIA LOTTERY BOARD.



Caesars Virginia
Virginia Lottery Update
October 25, 2023

#### **Danville Casino Future Home of Caesars – Q3 Highlights**



#### **Operations Highlights**

- Strong volumes continued into our first full quarter of operations
- \$91M in Net Gaming/AGR from opening through the end of September
- Increased the size of our Gaming Floor since opening
  - 786 Slot Machines (+46 since opening)
  - 33 Table Games (+8 since opening)
  - 36 Electronic Tables Games (+8 since opening)
  - 12 sports betting kiosks (+4 since opening)
- Our temporary facility has seen ~500k visitors since opening
  - Hosting our customers at businesses in Danville and the surrounding areas including host customer dinners, golf events, wine tasting, VIR
- Replaced all 36 tent panels of our temporary structure
- · Added a noodle bowl kiosk to the floor







#### **Danville Casino Future Home of Caesars – Hiring and Training**



#### **Hiring and Training Highlights**

- · Hiring remains strong with word of mouth on opportunities to work at the casino
- Table Games Dealer Schools continue on a regular basis
- Planning for the permanent casino hiring plan has started with connecting back with local colleges and universities
- As of the beginning of October:
  - 433 Team Members
  - 79% Virginia Residents
  - 51% Danville Residents
- Tourism education focus in Danville and surrounding areas
  - First Tourism Resource Collab at the Institute for Advanced Learning and Research
  - Averett University Hospitality Program launched online and in person with 20 students
  - Future of Hospitality and Tourism Workforce Summit Averett University with Virginia Tech



#### **Danville Casino Future Home of Caesars – Community**



#### **Community Boards**

- Institute for Advanced Learning and Research, River District Association, Danville Rotary Club & Community Foundation of the Dan River Region – Kunal Patel, Compliance Manager
- Danville and Pittsylvania County Chamber of Commerce & United Way of Danville and Pittsylvania County Chris Albrecht,
   General Manager
- · Boys and Girls Club of Danville Area Matthew Kern, Slot Director
- Danville Historical Society Dean Hairston, Security Director and Carmen Kesel, Marketing Director
- IDA Board for Pittsylvania County Jennifer Holley, Finance Director

#### **NRT Charities**

- Danville Science Center Foundation (August)
- Danville-Pittsylvania Cancer Association (September)
- Dan River Basin Association (October)

#### **HERO Events**

- North Main Street Clean Up
- · Boys and Girls Club Back to School Drive





### **Caesars Virginia – Construction Progress**





### **Caesars Virginia – Construction Progress**



