



Category 4 License Hearing Presentation by the Mountainview Thoroughbred  
Racing Association to the Pennsylvania Gaming Control Board

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**PENN NATIONAL**  
GAMING, INC.

November 1, 2018

mychoice

HOLLYWOOD

AMERISTAR

Lauberge

HOLLYWOOD  
CASINO.COM

MORE CHOICES. BETTER REWARDS.

# INTRODUCTIONS

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- John Finamore, Senior Vice President – Regional Operations
- Nelson Parker, Senior Vice President – Corporate Development
- Dan Ihm, Vice President & General Manager – Hollywood Casino @ Penn National Race Course

# ABOUT PENN NATIONAL GAMING & HOLLYWOOD CASINO AT PENN NATIONAL RACE COURSE

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John Finamore

Senior Vice President – Regional Operations

# ABOUT PENN NATIONAL GAMING



- Started in 1972 as a single racetrack outside of Harrisburg, Pennsylvania; headquartered in Wyomissing, PA
- Through steady and disciplined growth, we've become North America's largest regional gaming operator with 40 properties in 18 jurisdictions
- \$5 billion in annual revenues; 30,000+ employees



# OUR CORE VALUES

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Provide an Unparalleled Guest Experience

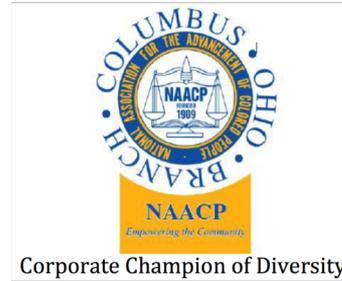


Work Happy

Commitment to Diversity

Commitment to Community

Commitment to Responsible Gaming



# HOLLYWOOD CASINO AT PENN NATIONAL RACE COURSE

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- ~\$400 million property opened in 2008
- 907 Team Members
- 2,002 slots & 75 tables games
- Paid \$1.6 billion in taxes and fees;  
\$156 million to Local Share Assessment
- \$338 million in salaries, wages, & benefits
- \$13 million annual local/state vendor spend



# COMMUNITY INVOLVEMENT



- ~\$3.75 million for IBD research @ Milton Hershey Medical Center
- ~\$1.32 million to local and regional charities
- ~\$100,000 to local ACS Relay for Life



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— YORK —

**DEVELOPMENT**

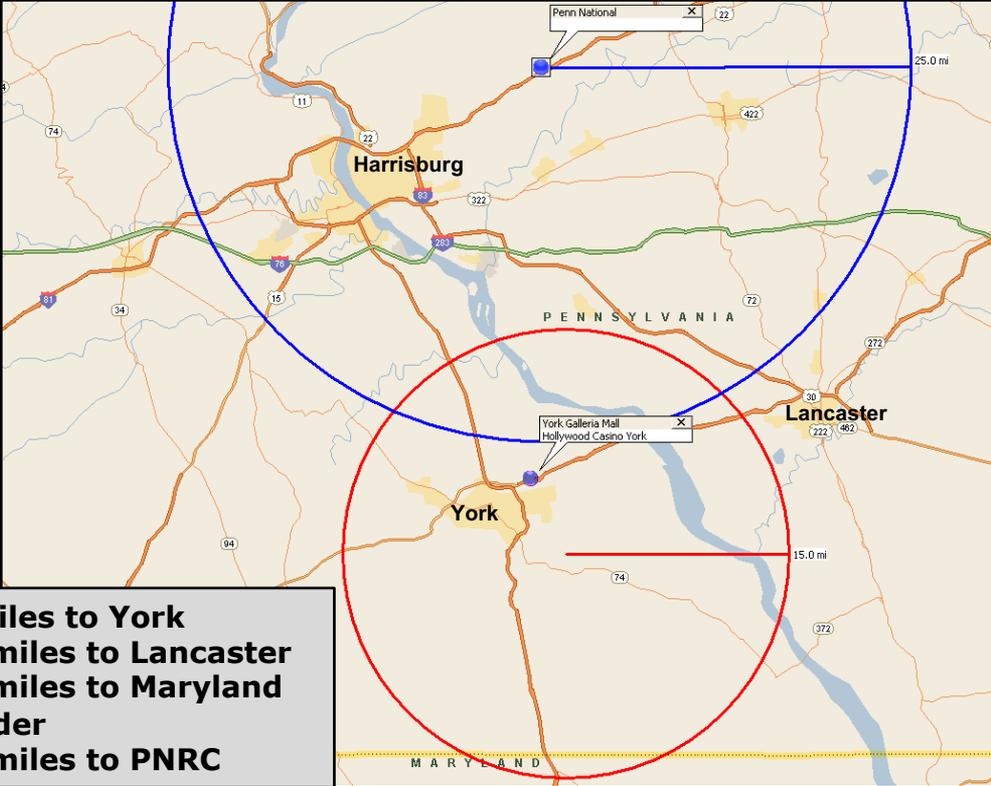
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Nelson Parker  
Senior Vice President – Corporate Development

# CATEGORY 4 LICENSE TIMELINE



- Won the 1<sup>st</sup> auction on January 10<sup>th</sup> for \$50.1M
- Selected 15-mile territory centered in the Borough of Yoe
  - I-83 / U.S. 30 corridor
- York Galleria
  - Existing infrastructure
  - Adaptive re-use
- Submitted gaming application to PGCB on September 12<sup>th</sup>



- **3 miles to York**
- **12 miles to Lancaster**
- **18 miles to Maryland border**
- **28 miles to PNR**

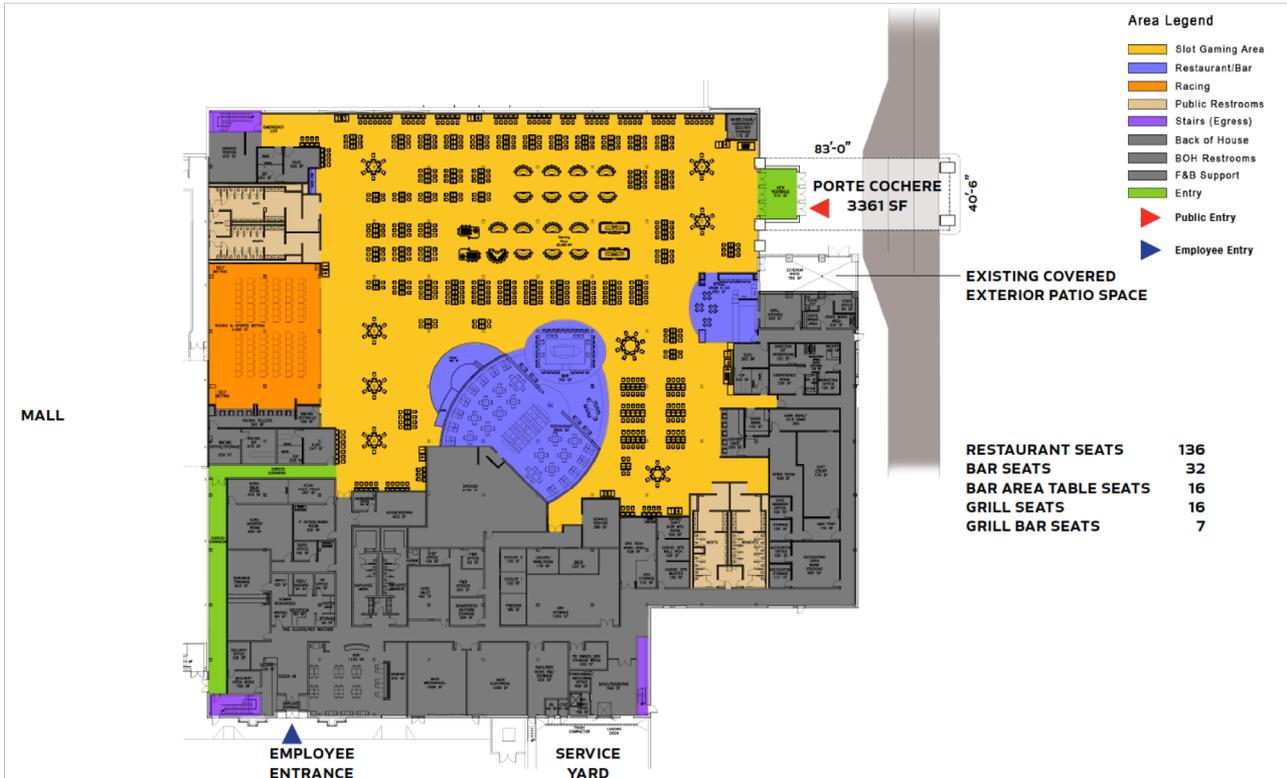
- \$120M total budget
- 80,000 SF in a single phase
- 500 slots & 24 tables
  - Expansion capability to 750 slots & 40 tables
- Casual dining & bar
- Lounge with small stage
- Grab N' Go Grill
- Race / Sports Book
- Target opening 1<sup>st</sup> half of 2020



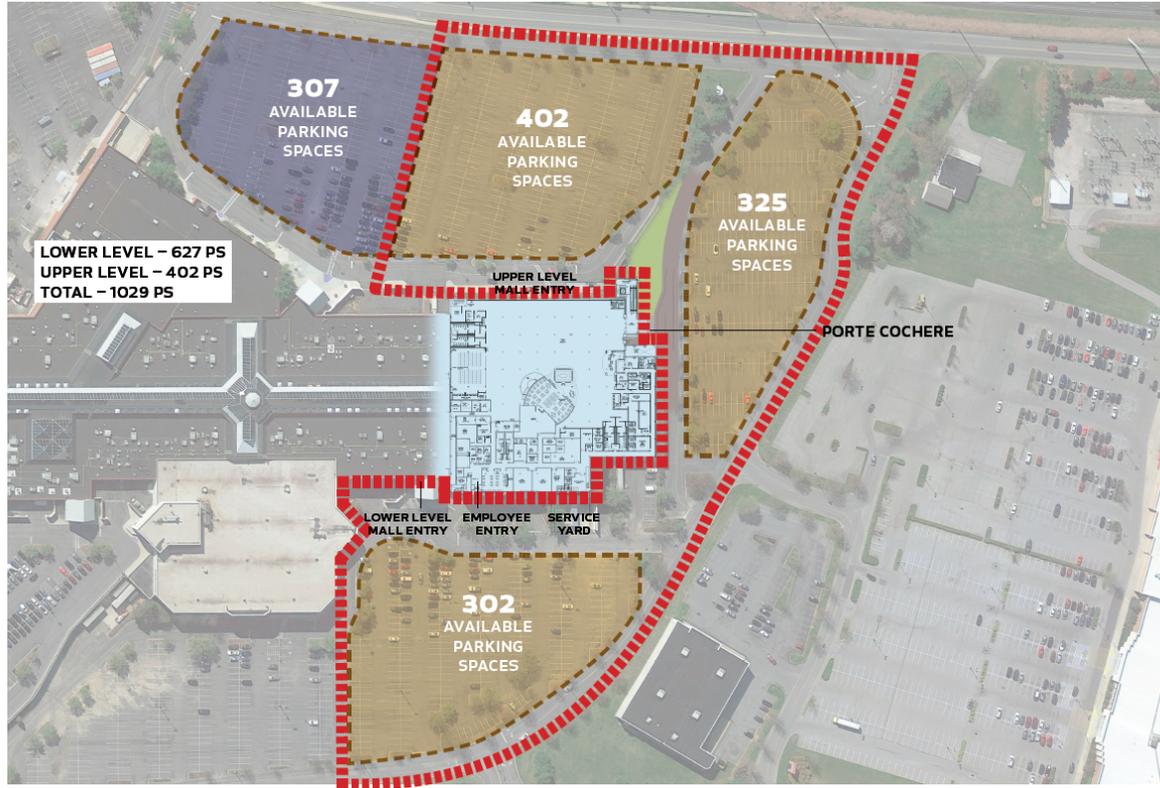








# PARKING SITE PLAN



- Transportation Resources Group conducted a comprehensive level of service (LOS) and turn-lane analysis for the proposed project
- 11 intersections were studied in total
- Thursday and Saturday peak hours were analyzed
- Trip generation assumed the maximum build-out of 750 slots and 40 tables
- Found acceptable LOS with the following recommendations:
  - Change Whiteford Rd. / York Galleria SW Entrance to right in-right out only
  - Optimize signal timing at Mt. Zion Rd. / U.S. 30 WB ramps – Whiteford Rd. and Mt. Zion Rd. / Pleasant Valley Rd.



- Other potential development-related local impacts were identified and studied, but deemed negligible
  - Utilities
  - Street Maintenance
  - Permitting / Zoning / Planning

- ~75 direct construction jobs and \$36.2 million in direct upfront construction expenditures
- One-time direct, indirect and induced positive impacts to the economy include:
  - **Springettsbury** - \$41.1 million, supporting 271 jobs and \$14 million in earnings
  - **York County** - \$59.9 million, supporting 400 jobs and \$19.8 million in earnings
  - **Pennsylvania** - \$68.8 million, supporting 440 jobs and \$22.2 million in earnings
  - **Other** - \$930,000 in personal income, sales, and business taxes



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OPERATIONS

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Dan Ihm

Vice President & General Manager

- 500 slot machines: reel & video, various denominations
- 24 table games: variations of blackjack, craps, and roulette
- Pari-mutuel wagering and sports book
- Casual restaurant & bar
- Lounge with small stage
- Grab N' Go Grill





- ~200 direct Full Time Equivalent (FTEs) positions
- Benefits
  - 401k
  - Medical
  - Dental
  - Paid Time Off
  - Bonus Programs
  - Tuition Reimbursement
  - Professional Development
  - Free Table Games Dealer Training
- Representative of the Community

STAFFING	
FACILITIES/HOUSEKEEPING	6.7%
FINANCE/CAGE	11.8%
FOOD & BEVERAGE	22.7%
GAMING	42.1%
HR/ADMIN	1.0%
IT	1.0%
MARKETING	1.0%
SECURITY	8.9%
SURVEILLANCE	4.8%

- Training provided upon hire and annually thereafter
- Quarterly roundtable knowledge checks
- Daily pre-shift discussions
- State-of-the-Art ID verification system
- \$95,000 paid to Security Officers—\$100 for 100 Days Program



• • • **KNOW YOUR LIMIT** • • •

### One-Time Impacts

- **Springettsbury** - \$50.9 million, supporting 156 jobs and \$6.7 million in earnings
- **York County** - \$73.1 million, supporting 470 jobs and \$12.3 million in earnings
- **Pennsylvania** - \$79 million, supporting 500 jobs and \$13.9 million in earnings
- **Other** - \$820,000 in personal income, sales, and business taxes

### Upon Stabilization

- **Springettsbury** - \$63.9 million, supporting 197 jobs and \$8.5 million in earnings
- **York County** - \$91.7 million, supporting 600 jobs and \$15.4 million in earnings
- **Pennsylvania** - \$99.1 million, supporting 600 jobs and \$15.4 million in earnings
- **Other** - Over \$1 million in personal income, sales, and business taxes



**SPRINGETTSBURY  
TOWNSHIP**



- ~\$1 Million annually in new revenues for Springettsbury Township upon stabilization
- Public Safety
  - Police
  - Fire
  - EMS
- Housing
- Existing Tourism



- Penn National is a highly reputable entertainment company that creates and operates high-quality facilities
- Significant investment at the York Galleria
- Creation of approximately 200 permanent jobs & 75 construction jobs
- Negligible impacts and costs
- ~\$1 Million annually in new tax revenues for Springettsbury



# Thank You

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