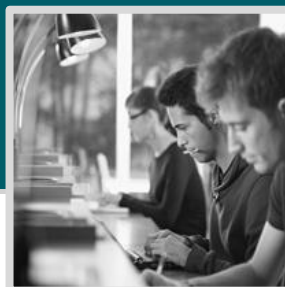
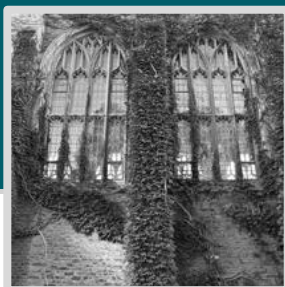


Market Analysis – Casino Gaming Industry

Prepared for Clarion University of Pennsylvania

March 2014



In the following report, Hanover Research assesses the market for a new postsecondary program in casino gaming at Clarion University of Pennsylvania by examining degree completions data, labor market projections, and existing programs in the region.

TABLE OF CONTENTS

Executive Summary and Key Findings	3
Introduction	3
Key Findings.....	3
Section I: Student Demand Analysis.....	5
Methodology	5
National Data	9
Regional Data	10
State Data	11
Section II: Labor Market Analysis.....	13
Methodology	13
National Outlook	15
Regional Outlook.....	16
State Outlook	17
Analysis of Pennsylvania Gaming Industry.....	18
Overview of Development	18
Revenue and Employment Levels	20
Current Job Vacancies	22
Section III: Competitor Profiles	25
Northampton Community College	25
Casino Training Programs	25
Associate's Degree Program	27
Degree Completions.....	29
Central Michigan University.....	30
Bachelor's Degree Program	30
Degree Completions.....	32
Drexel University	32
Graduate Certificate Program	32
Master's Degree Program	34
Degree Completions.....	35

EXECUTIVE SUMMARY AND KEY FINDINGS

INTRODUCTION

In this report, Hanover Research assesses the market for a new training program in casino gaming at Clarion University of Pennsylvania. Drawing on historical degree conferral data and long-term labor market projections, we evaluate trends in student and employer demand for programs designed to prepare individuals for a career in Pennsylvania's emergent casino gaming industry. This report comprises three main sections:

- **Section I: Student Demand Analysis** evaluates potential student demand for a training program in casino gaming by examining recent associate's degree, bachelor's degree, and master's degree conferrals. This section examines degree conferral trends nationwide, as well as trends in Pennsylvania and bordering states.
- **Section II: Labor Market Analysis** considers the employment outlook for various occupations in the casino gaming industry. As with degree conferrals, this section examines trends nationwide, as well as trends in Pennsylvania and bordering states. This section also presents an overview of Pennsylvania's gaming industry and reviews job vacancies at local casinos.
- **Section III: Competitor Profiles** identifies potential competitors by examining institutions that currently offer casino gaming training programs. This section examines an occupational training program and an associate's degree program at Northampton Community College, a bachelor's degree program at Central Michigan University, and a graduate certificate and a master's degree program at Drexel University.

KEY FINDINGS

- **Twelve large casinos have opened in Pennsylvania since gambling was legalized in 2004, creating over 16,000 new jobs and generating over \$6 billion in tax revenue.** Over the previous 10 years, Pennsylvania's casino gaming tax revenue has become the largest of any state in the nation, outpacing historical leaders Nevada and New Jersey. The 2004 Gaming Act authorized 14 gaming licenses, and two have yet to be approved. One is reserved for Philadelphia, and the other is being planned for western Pennsylvania.
- **A new casino is being developed 66 miles from Clarion University in New Castle, Pennsylvania.** However, the Lawrence Downs Casino and Racing Resort must still be approved by the Pennsylvania Gaming Control Board prior to opening. Some analysts are skeptical of the project, and a crucial component of the approval process is a public hearing scheduled for May 2014. The casino developers indicated that, if approved, the resort would create between 1,180 and 2,700 new jobs. Including those in bordering states, 12 casinos are currently open within 150 miles of Clarion University, but Lawrence Downs would be the closest.

- **Pennsylvania employment projections forecast robust growth for casino gaming jobs through 2020.** From 2010 to 2020, the Pennsylvania Department of Labor and Industry projects that casino gaming occupations will increase by nearly 50 percent. This is much greater than the projected rate of 6.4 percent for overall employment in the state.
- **Current job vacancies at nearby casinos are concentrated in food and beverage; finance and operations; and horse racing occupations.** The casino gaming industry offers extremely diverse career possibilities, including culinary arts, accounting, hospitality management, security, and marketing. However, Bureau of Labor Statistics data and a scan of local job opportunities suggest that **nearly all jobs in the casino gaming industry do not require a college degree.**
- **Historical completions data suggest increasing student demand for academic programs related to the casino gaming industry.** From 2008 to 2012, nationwide associate's degree conferrals in related fields increased by 5.3 percent, bachelor's degree conferrals increased by 4.1 percent, and master's degree conferrals increased by 10.9 percent. During this time in Pennsylvania, degree conferrals in Hospitality Administration/Management (CIP 52.09) decreased at the associate's degree level, slightly increased at the bachelor's degree level, and substantially increased at the master's degree level.
- **Academic programs focused on the casino gaming industry are typically offered as a concentration within a hospitality management program.** While associate's, bachelor's, and master's degree programs in hospitality administration and management are common, programs at these award levels with a specific focus on the casino gaming industry appear to be relatively uncommon. In 2012, only one institution in the county – Central Michigan University – reported degree conferrals at any award level under Casino Management (CIP 52.0908).
- **Hospitality programs with casino-focused concentrations typically include courses in resort management, finance, gaming regulations, and casino operations.** Additional courses may include hotel management, customer relations, gaming technology, and sociology or psychology. The bachelor's and master's degree programs reviewed in this report also require students to complete an independent research project.
- **Pennsylvania community colleges have formed partnerships with casinos to provide occupational training programs.** For instance, Northampton Community College launched a table games dealer training program in 2010, one year after Sands Casino opened in the city. The program has expanded to include floor supervision training, casino surveillance training, English language instruction for ESL employees, and a fully functioning mock casino on campus. However, this arrangement may be risky, as some casinos have terminated partnerships in order to deliver their own training to employees.

SECTION I: STUDENT DEMAND ANALYSIS

In this section, Hanover estimates potential student demand for an academic program in casino gaming by analyzing degree completions data obtained from the National Center for Education Statistics (NCES).

METHODOLOGY

To estimate student demand for a program in casino gaming, we use recent degree completions data published by the National Center for Education Statistics (NCES). NCES employs a taxonomic system of numeric codes to classify postsecondary academic programs, known as the Classification of Instructional Programs (CIP) system. Institutions of higher education nationwide submit degree completion data, classified by CIP code, to the NCES's Integrated Postsecondary Education Data System (IPEDS).¹

While IPEDS presents the most comprehensive conferral data available, a degree of caution is warranted when interpreting the aggregated data, as there are certain considerations that must be taken into account. First, slight modifications were made in 2010 to the NCES's classification of programs from the 2000 version of the CIP taxonomy. Therefore, the number of program classifications has increased from the old 2000 CIP system to the new 2010 CIP. For instance, **Casino Management (CIP 52.0908) was added in 2010**. Second, institutions classify their programs independently, meaning that two programs that are identical in all respects could hypothetically be classified under different CIP codes. In addition, for any given institution, it cannot always be assumed that IPEDS completions data for an individual CIP classification always correspond directly to an individual program.

Nonetheless, examining degree completion trends over recent years allows for an estimate of potential student demand for a program in casino gaming. If degree conferrals have increased over time within a certain geographical area, it is reasonable to infer that demand for such a degree is trending upward within the region. Correspondingly, if completions have decreased, then it is likely that demand is also decreasing. Accordingly, this report gauges student demand for credentials in casino gaming based on completions data collected over the previous five years. In addition to raw data, we provide the compound annual growth rate (CAGR), which provides a smoothed measurement of annual growth, disregarding year-to-year fluctuations in the data.

To inform our selection of relevant CIP codes, Hanover first conducted a scan of current job openings listed by casinos near Clarion University. Section II presents a complete analysis of these occupations, and Appendix B documents the entire list of openings reviewed for this report. This scan suggested that most openings in the industry are concentrated in several occupational categories, including food and beverage, finance, hospitality management, and

¹ "Integrated Postsecondary Education Data System." National Center for Education Statistics.
<http://nces.ed.gov/ipeds/datacenter/>

marketing. Accordingly, this analysis of potential student demand focuses on the following four-digit CIP categories:

- 12.05: Culinary Arts and Related Services
- 52.03: Accounting and Related Services
- 52.09: Hospitality Administration/Management
- 52.19: Specialized Sales, Merchandising and Marketing Operations

Each of these four-digit categories includes several, increasingly detailed six-digit CIP codes. Figure 1.1 presents the complete list of CIP codes and definitions that are examined in this report. Due to the large number of relevant academic fields, data in this section are presented at the four-digit level. Appendix A at the conclusion of this report provides detailed completions data at the six-digit level.

Figure 1.1: CIP Codes

CIP	DEFINITION
12.05: Culinary Arts and Related Services	
12.0500: Cooking and Related Culinary Arts, General	A program that focuses on the general study of the cooking and related culinary arts, and that may prepare individuals for a variety of jobs within the food service industry. Includes instruction in food preparation, cooking techniques, equipment operation and maintenance, sanitation and safety, communication skills, applicable regulations, and principles of food service management.
12.0501: Baking and Pastry Arts/Baker/Pastry Chef	A program that prepares individuals to serve as professional bakers and pastry specialists in restaurants or other commercial baking establishments. Includes instruction in bread and pastry making, bread and pastry handling and storage, cake and pastry decorating, baking industry operations, product packaging and marketing operations, and counter display and service.
12.0502: Bartending/Bartender	A program that prepares individuals to professionally prepare mixed alcoholic and non-alcoholic beverages and related products and manage bars, lounges, and beverage service operations in the hospitality industry. Includes instruction in mixology, oenology, accounting and cash management, inventory and cellar management, bar and lounge management, applicable laws and regulations, customer service, and labor/employment regulations.
12.0503: Culinary Arts/Chef Training	A program that prepares individuals to provide professional chef and related cooking services in restaurants and other commercial food establishments. Includes instruction in recipe and menu planning, preparing and cooking of foods, supervising and training kitchen assistants, the management of food supplies and kitchen resources, aesthetics of food presentation, and familiarity or mastery of a wide variety of cuisines and culinary techniques.
12.0504: Restaurant, Culinary, and Catering Management/ Manager	A program that prepares individuals to plan, supervise, and manage food and beverage preparation and service operations, restaurant facilities, and catering services. Includes instruction in food/beverage industry operations, cost control, purchasing and storage, business administration, logistics, personnel management, culinary arts, restaurant and menu planning, executive chef functions, event planning and management, health and safety, insurance, and applicable law and regulations.

CIP	DEFINITION
12.0505: Food Preparation/Professional Cooking/ Kitchen Assistant	A program that prepares individuals to serve under the supervision of chefs and other food service professionals as kitchen support staff and commercial food preparation workers. Includes instruction in kitchen organization and operations, sanitation and quality control, basic food preparation and cooking skills, kitchen and kitchen equipment maintenance, and quantity food measurement and monitoring.
12.0507: Food Service, Waiter/ Waitress, and Dining Room Management/ Manager	A program that prepares individuals to serve food to customers in formal or informal settings. Includes instruction in the nutritional, sensory, and functional properties of food and its ingredients; food services principles; table and counter services; dining room operations and procedures; service personnel supervision and management; communication skills; business math; safety; and sanitation.
52.03: Accounting and Related Services	
52.0301: Accounting	A program that prepares individuals to practice the profession of accounting and to perform related business functions. Includes instruction in accounting principles and theory, financial accounting, managerial accounting, cost accounting, budget control, tax accounting, legal aspects of accounting, auditing, reporting procedures, statement analysis, planning and consulting, business information systems, accounting research methods, professional standards and ethics, and applications to specific for-profit, public, and non-profit organizations.
52.0302: Accounting Technology/Technician and Bookkeeping	A program that prepares individuals to provide technical administrative support to professional accountants and other financial management personnel. Includes instruction in posting transactions to accounts, record-keeping systems, accounting software operation, and general accounting principles and practices.
52.0303: Auditing	A program that prepares individuals, including certified accountants, to perform independent internal and external appraisals to evaluate organizational financial and operational activities, ensure compliance with laws and policies, safeguard assets, and promote effective planning and resource allocation. Includes instruction in advanced accounting, audit tools and techniques, sampling, risk and control, audit planning, audit function management, law and regulations, environmental auditing, information technology applications, professional standards and ethics, and specific industry and service sector problems.
52.09: Hospitality Administration/Management	
52.0901: Hospitality Administration/ Management, General	A program that prepares individuals to serve as general managers and directors of hospitality operations on a system-wide basis, including both travel arrangements and promotion and the provision of traveler facilities. Includes instruction in principles of operations in the travel and tourism, hotel and lodging facilities, food services, and recreation facilities industries; hospitality marketing strategies; hospitality planning; management and coordination of franchise and unit operations; business management; accounting and financial management; hospitality transportation and logistics; and hospitality industry policies and regulations.

CIP	DEFINITION
52.0903: Tourism and Travel Services Management	A program that prepares individuals to manage travel-related enterprises and related convention and/or tour services. Includes instruction in travel agency management, tour arranging and planning, convention and event planning, travel industry operations and procedures, tourism marketing and promotion strategies, travel counseling, travel industry law, international and domestic operations, and travel and tourism policy.
52.0904: Hotel/Motel Administration/Management	A program that prepares individuals to manage operations and facilities that provide lodging services to the traveling public. Includes instruction in hospitality industry principles; supplies purchasing, storage and control; hotel facilities design and planning; hospitality industry law; personnel management and labor relations; financial management; marketing and sales promotion; convention and event management; front desk operations; and applications to specific types of hotels and motel operations.
52.0905: Restaurant/Food Services Management	A program that prepares individuals to plan, manage, and market restaurants, food services in hospitality establishments, food service chains and franchise networks, and restaurant supply operations. Includes instruction in hospitality administration, food services management, wholesale logistics and distribution, franchise operations, business networking, personnel management, culinary arts, business planning and capitalization, food industry operations, marketing and retailing, business law and regulations, finance, and professional standards and ethics.
52.0906: Resort Management	A program that prepares individuals to plan, manage, and market comprehensive vacation facilities and services and related products. Includes instruction in hospitality administration, hotel/motel management, restaurant and food services management, facilities planning, leisure studies, recreation administration, marketing, recreation equipment and grounds operations and maintenance, business finance, insurance and taxation, event management and guest services, personnel management, travel and logistics management, safety and health services, professional standards and ethics, and applications to specific vacation types and locations.
52.0907: Meeting and Event Planning	A program that prepares individuals to plan, budget, and implement conferences, meetings, and other special events in the public or private sectors. Includes instruction in principles of meeting and event planning; special event management; budgets and finance; site selection; contracts, vendors, and negotiations; marketing and promotions; food and beverage management; audio-visual basics and meeting technology; and hospitality law.
52.0908: Casino Management	A program that prepares individuals to manage casinos and gaming establishments. Includes instruction in casino operations, casino security and surveillance, principles of the gaming industry, ethics, and gaming law.
52.0909: Hotel, Motel, and Restaurant Management	An instructional program that prepares individuals to manage operations and facilities that provide food and/or lodging services to the traveling public. Includes instruction in hospitality industry principles; supplies purchasing, storage, and control; hotel and restaurant facilities design and planning; hospitality industry law; personnel management and labor relations; financial management; facilities management; marketing and sale promotion strategies; convention and event management; front desk operations; and applications to specific types of hotel, motel, and/or restaurant operations.
52.0999: Hospitality Administration/Management, Other	Any instructional program in hospitality service management not listed above.

CIP	DEFINITION
52.19: Specialized Sales, Merchandising and Marketing Operations	
52.1905: Tourism and Travel Services Marketing Operations	A program that prepares individuals to provide direct retail services to hotel and motel clients and customers in a variety of settings. Includes instruction in the principles of hotel/motel operations, customer sales and assistance operations and techniques, telephone operations, and basic office management.
52.1906: Tourism Promotion Operations	A program that prepares individuals to perform marketing and sales operations connected with the promotion of tourism in public and private sector settings. Includes instruction in principles of marketing research and advertising, promotional campaign organization, media relations, and applicable technical and administrative skills.
52.1910: Hospitality and Recreation Marketing Operations	A program that prepares individuals to provide marketing services in the hospitality and leisure fields. Includes instruction in hospitality operations, customer sales and assistance operations and techniques, telephone operations, basic office management, retail sports, recreation equipment, food and beverage.

Source: IPEDS

NATIONAL DATA

Nationwide conferral data suggest increasing student demand for academic programs related to the casino gaming industry. Over the previous five years, associate's, bachelor's and master's degree conferrals increased by 5.4 percent annually (Figure 1.2). In particular, master's degree completions increased at an annual rate of 10.9 percent, more rapidly than other award levels. Growth at the master's degree level was concentrated in Accounting and Related Services (CIP 52.03) and Hospitality Administration/Management (CIP 52.09), whereas exceptionally few master's degree completions were reported in Culinary Arts and Related Services (CIP 12.05) and Specialized Sales, Merchandising and Marketing Operations (CIP 52.19). However, data for accounting related fields should be interpreted with caution, as the majority of students completing these degrees will pursue other industries.

In fact, degree conferrals in Accounting and Related Services (CIP 52.03) and Hospitality Administration/Management (CIP 52.09) increased at every award level from 2008 to 2012. Degree conferrals in Hospitality Administration/Management (CIP 52.09) increased by 4.6 percent annually at the associate's award level, 7.1 percent annually at the bachelor's degree level, and 6.9 percent annually at the master's degree level. Similarly, degree conferrals in Accounting and Related Services (CIP 52.03) increased by 5.4 percent annually at the associate's award level, 3.4 percent annually at the bachelor's degree level, and 11.1 percent annually at the master's degree level.

While degree completions rose across all CIP categories, degree completions in Specialized Sales, Merchandising and Marketing Operations (CIP 52.19) actually decreased at each award level over the previous five years. Associate's degree conferrals decreased by 14.7 percent annually and bachelor's degree conferrals decreased by 7.0 percent annually.

Figure 1.2: Nationwide Completions in Casino Gaming-related Fields, 2008-2012

FIELD	2008	2009	2010	2011	2012	TOTAL	CAGR
Associate's Degrees							
12.05 Culinary Arts and Related Services	14,488	14,247	14,161	15,794	18,132	76,822	5.8%
52.03 Accounting and Related Services	15,461	16,119	17,051	19,301	19,085	87,017	5.4%
52.09 Hospitality Administration/ Management	3,127	3,281	3,227	3,442	3,740	16,817	4.6%
52.19 Specialized Sales, Merchandising and Marketing Operations	387	412	347	186	205	1,537	-14.7%
Associate's Degrees Total	33,463	34,059	34,786	38,723	41,162	182,193	5.3%
Bachelor's Degrees							
12.05 Culinary Arts and Related Services	736	820	749	1,016	1,137	4,458	11.5%
52.03 Accounting and Related Services	46,230	47,324	53,183	51,663	52,877	251,277	3.4%
52.09 Hospitality Administration/ Management	9,210	10,156	10,698	11,340	12,096	53,500	7.1%
52.19 Specialized Sales, Merchandising and Marketing Operations	215	221	189	206	161	992	-7.0%
Bachelor's Degrees Total	56,391	58,521	64,819	64,225	66,271	310,227	4.1%
Master's Degrees							
12.05 Culinary Arts and Related Services	7	--	--	--	--	7	--
52.03 Accounting and Related Services	11,019	11,692	14,018	16,243	16,807	69,779	11.1%
52.09 Hospitality Administration/ Management	641	678	722	792	837	3,670	6.9%
52.19 Specialized Sales, Merchandising and Marketing Operations	11	21	--	--	--	32	--
Master's Degrees Total	11,678	12,391	14,740	17,035	17,644	73,488	10.9%
Total	101,532	104,971	114,345	119,983	125,077	565,908	5.4%

Source: IPEDS

REGIONAL DATA

Figure 1.3 presents regional degree conferral data. This comprises data from Pennsylvania and all bordering states, including Delaware, Maryland, New Jersey, New York, Ohio, and West Virginia.

Similar to nationwide data, regional data suggest increasing student demand for associate's, bachelor's, and master's degrees in casino gaming-related fields (Figure 1.3). Growth in relevant master's degree programs was most pronounced relative to associate's and bachelor's degree programs. However, much of this growth is attributable to increasing degree completions in Accounting and Related Services (CIP 52.03), which encompasses a wide range of programs that do not necessarily focus on casino gaming.

Regional degree conferrals in Hospitality Administration/Management (CIP 52.09) increased at each award level over the previous five years. Associate's degree awards in these fields grew by 6.2 percent annually, bachelor's degrees grew by 4.9 percent annually, and master's degrees grew by 5.4 percent annually.

Figure 1.3: Regional Completions in Casino Gaming-related Fields, 2008-2012

FIELD	2008	2009	2010	2011	2012	TOTAL	CAGR
Associate's Degrees							
12.05 Culinary Arts and Related Services	2,841	2,920	2,788	2,887	2,968	14,404	1.1%
52.03 Accounting and Related Services	3,640	3,550	3,741	4,040	3,911	18,882	1.8%
52.09 Hospitality Administration/ Management	958	991	989	1,103	1,217	5,258	6.2%
52.19 Specialized Sales, Merchandising and Marketing Operations	209	221	209	112	130	881	-11.2%
Associate's Degrees Total	7,648	7,682	7,727	8,142	8,226	39,425	1.8%
Bachelor's Degrees							
12.05 Culinary Arts and Related Services	121	122	131	167	139	680	3.5%
52.03 Accounting and Related Services	11,098	12,294	12,235	13,391	13,427	62,445	4.9%
52.09 Hospitality Administration/ Management	2,139	2,283	2,351	2,417	2,587	11,777	4.9%
52.19 Specialized Sales, Merchandising and Marketing Operations	98	109	79	76	104	466	1.5%
Bachelor's Degrees Total	13,456	14,808	14,796	16,051	16,257	75,368	4.8%
Master's Degrees							
12.05 Culinary Arts and Related Services	7	--	--	--	--	7	--
52.03 Accounting and Related Services	1,428	1,697	1,835	2,805	3,209	10,974	22.4%
52.09 Hospitality Administration/ Management	205	241	238	241	253	1,178	5.4%
52.19 Specialized Sales, Merchandising and Marketing Operations	11	21	--	--	--	32	--
Master's Degrees Total	1,651	1,959	2,073	3,046	3,462	12,191	20.3%
Total	22,755	24,449	24,596	27,239	27,945	126,984	5.3%

Source: IPEDS

STATE DATA

Pennsylvania data indicate that degree conferrals in fields related to the casino gaming industry increased modestly over the previous five years at a rate of 0.8 percent annually (Figure 1.4). Similar to nationwide and regional data, degree conferral growth was concentrated in master's degree programs, rather than bachelor's and associate's degree programs. In fact, associate's degree conferrals in each CIP category actually decreased from 2008 to 2012. It should be noted, however, that the majority of master's degree completions were in Accounting and Related Services, which must be interpreted with caution given the wide range of jobs and industries these students will consider.

Master's degree conferrals in Hospitality Administration/Management (CIP 52.09) increased by 16.1 percent since 2008. However, master's degrees in this field remain relatively uncommon and just 49 awards were reported in 2012. Bachelor's degree conferrals in Hospitality Administration/Management (CIP 52.09) increased slightly at an average annual rate of 1.7 percent, while associate's degrees decreased by 4.2 percent.

Figure 1.4: Pennsylvania Completions in Casino Gaming-related Fields, 2008-2012

FIELD	2008	2009	2010	2011	2012	TOTAL	CAGR
<i>Associate's Degrees</i>							
12.05 Culinary Arts and Related Services	924	865	746	765	721	4,021	-6.0%
52.03 Accounting and Related Services	577	530	529	540	495	2,671	-3.8%
52.09 Hospitality Administration/ Management	271	205	172	165	228	1,041	-4.2%
52.19 Specialized Sales, Merchandising and Marketing Operations	75	64	47	37	26	249	-23.3%
Associate's Degrees Total	1,847	1,664	1,494	1,507	1,470	7,982	-5.5%
<i>Bachelor's Degrees</i>							
12.05 Culinary Arts and Related Services	94	83	100	136	113	526	4.7%
52.03 Accounting and Related Services	2,488	2,640	2,859	2,832	2,753	13,572	2.6%
52.09 Hospitality Administration/ Management	583	562	567	601	624	2,937	1.7%
52.19 Specialized Sales, Merchandising and Marketing Operations	--	--	--	--	2	2	--
Bachelor's Degrees Total	3,165	3,285	3,526	3,569	3,492	17,037	2.5%
<i>Master's Degrees</i>							
52.03 Accounting and Related Services	147	170	142	274	334	1,067	22.8%
52.09 Hospitality Administration/ Management	27	41	42	41	49	200	16.1%
Master's Degrees Total	174	211	184	315	383	1,267	21.8%
Total	5,186	5,160	5,204	5,391	5,345	26,286	0.8%

Source: IPEDS

SECTION II: LABOR MARKET ANALYSIS

This section considers the employment outlook for the occupations most commonly associated with the casino gaming industry. We examine national employment projection data, as well as data for Pennsylvania and the surrounding region gathered from state labor departments. This section also analyzes the Pennsylvania gaming industry by examining the regulatory environment, employment levels at state casinos, and current job openings at casinos near Clarion University.

METHODOLOGY

The Bureau of Labor Statistics (BLS) uses a coding system to classify job types and track employment figures. These occupational codes, known as the ‘Standard Occupational Classification’ (SOC) codes, are the most widely used system of employment classification and are used by most state and local statistical agencies.²

While selecting SOC codes to include in this report, Hanover took a more narrow approach than the approach used with CIP codes in Section I. It is important to note that the American Gaming Association (AGA) describes the casino gaming industry as a “multi-faceted corporate environment with **extremely diverse career possibilities** ranging from architecture and accounting to hotel management, computer science, and information technology.”³ However, in order to more accurately assess the casino labor market, this report only examines occupations that directly correspond with the casino gaming industry.

Figure 2.1 presents the complete list of SOC codes examined in this report, as well as the typical educational attainment required for entry, work experience required for entry, and nature of on-the-job training. The BLS indicates that all of the SOC occupations directly linked to the casino gaming industry typically require a high school diploma or equivalent for entry, **suggesting casino jobs do not typically require postsecondary credentials**. Additionally, BLS data suggest that casino occupations typically require no prior work experience or less than five years of related work experience (Figure 2.1).

² “Standard Occupational Classification.” Bureau of Labor Statistics. <http://www.bls.gov/soc/>

³ “Casino Employment.” American Gaming Association. <http://www.americangaming.org/industry-resources/research/fact-sheets/casino-employment>

Figure 2.1: Gaming service Occupations

SOC TITLE	DEFINITION	EDUCATIONAL ATTAINMENT	WORK EXPERIENCE	ON-THE-JOB TRAINING
11-9071: Gaming Managers	Plan, direct, or coordinate gaming operations in a casino. May formulate house rules.	High school diploma or equivalent	Less than 5 years	None
33-9031: Gaming Surveillance Officers and Gaming Investigators	Act as oversight and security agent for management and customers. Observe casino or casino hotel operation for irregular activities such as cheating or theft by either employees or patrons. May use one-way mirrors above the casino floor, cashier's cage, and front desk. Use of audio/video equipment is also common to observe operation of the business. Usually required to provide verbal and written reports of all violations and suspicious behavior to supervisor.	High school diploma or equivalent	None	Short-term on-the-job training
39-1011: Gaming Supervisors	Supervise and coordinate activities of workers in assigned gaming areas. Circulate among tables and observe operations. Ensure that stations and games are covered for each shift. May explain and interpret operating rules of house to patrons. May plan and organize activities and services for guests in hotels/casinos. May address service complaints.	High school diploma or equivalent	Less than 5 years	None
39-1012: Slot Supervisors	Supervise and coordinate activities of slot department workers to provide service to patrons. Handle and settle complaints of players. Verify and pay off jackpots. Reset slot machines after payoffs. Make repairs or adjustments to slot machines or recommend removal of slot machines for repair. Report hazards and enforce safety rules.	High school diploma or equivalent	Less than 5 years	None
39-3011: Gaming Dealers	Operate table games. Stand or sit behind table and operate games of chance by dispensing the appropriate number of cards or blocks to players, or operating other gaming equipment. Distribute winnings or collect players' money or chips. May compare the house's hand against players' hands.	High school diploma or equivalent	None	Short-term on-the-job training
39-3012: Gaming and Sports Book Writers and Runners	Post information enabling patrons to wager on various races and sporting events. Assist in the operation of games such as keno and bingo. May operate random number generating equipment and announce the numbers for patrons. Receive, verify, and record patrons' wagers. Scan and process winning tickets presented by patrons and payout winnings for those wagers.	High school diploma or equivalent	None	Short-term on-the-job training
39-3019: Gaming Service Workers, All Other	All gaming service workers not listed separately.	High school diploma or equivalent	None	Short-term on-the-job training
41-2012: Gaming Change Persons and Booth Cashiers	Exchange coins, tokens and chips for patrons' money. May issue payoffs and obtain customer's signature on receipt. May operate a booth in the slot machine area and furnish change persons with money bank at the start of the shift, or count and audit money in drawers.	High school diploma or equivalent	None	Short-term on-the-job training

SOC TITLE	DEFINITION	EDUCATIONAL ATTAINMENT	WORK EXPERIENCE	ON-THE-JOB TRAINING
43-3041: Gaming Cage Workers	In a gaming establishment, conduct financial transactions for patrons. May reconcile daily summaries of transactions to balance books. Accept patron's credit application and verify credit references to provide check-cashing authorization or to establish house credit accounts. May sell gambling chips, tokens, or tickets to patrons, or to other workers for resale to patrons. May convert gaming chips, tokens, or tickets to currency upon patron's request. May use a cash register or computer to record transaction.	High school diploma or equivalent	None	Short-term on-the-job training

Source: BLS

NATIONAL OUTLOOK

Nationally, BLS predicts average growth for casino gaming-related occupations through 2022. Casino jobs are expected to grow by 8.6 percent, which is slightly less than the national growth rate of 10.8 percent for all occupations (Figure 2.2). From 2012 to 2022, the casino gaming workforce is projected to add 20,000 jobs, increasing from 232,200 employees to 252,200.

Of these nine occupations examined, Gaming Dealers (SOC 39-3011) are projected to grow most rapidly and add the largest number of jobs. BLS also expects Gaming Supervisors (SOC 39-1011) to experience strong growth in the coming years and to add over 3,000 jobs from 2012 to 2022. In contrast, Gaming Change Persons and Booth Cashiers (SOC 41-1012) are expected to remain completely stagnant, neither losing nor adding jobs over the 10 year period (Figure 2.2).

Figure 2.2: National Employment Projections for Gaming-related Occupations, 2012-2022

SOC	OCCUPATION	EMPLOYMENT		CHANGE, 2012-2022		AVERAGE ANNUAL JOB OPENINGS*
		2012	2022	NUMBER	PERCENT	
11-9071	Gaming Managers	4,800	5,200	400	7.5%	140
33-9031	Gaming Surveillance Officers and Gaming Investigators	9,300	10,000	600	7.0%	210
39-1011	Gaming Supervisors	38,500	41,600	3,100	8.2%	1,100
39-1012	Slot Supervisors	10,700	11,400	600	5.8%	280
39-3011	Gaming Dealers	100,300	111,700	11,400	11.4%	2,870
39-3012	Gaming and Sports Book Writers and Runners	14,700	15,800	1,100	7.8%	370
39-3019	Gaming Service Workers, All Other	13,200	14,400	1,200	9.4%	350
41-1012	Gaming Change Persons and Booth Cashiers	22,300	22,300	0	0.1%	970
43-3041	Gaming Cage Workers	18,400	19,800	1,300	7.3%	490
Total		232,200	252,200	20,000	8.6%	6,780

Source: BLS

*Annual job openings calculated by dividing decadal job openings by 10

REGIONAL OUTLOOK

Figure 2.3 presents occupational projections for Pennsylvania and bordering states, which include Delaware, Maryland, New Jersey, New York, Ohio, and West Virginia. It must be noted that these data were gathered from state labor departments, and each state does not necessarily use every SOC code. For instance, only two states – Pennsylvania and New Jersey – provide projections for Gaming Managers (SOC 11-9071). Nonetheless, the aggregated data provides insight into regional employment trends.

Regional employment projections suggest moderate growth for casino gaming professions through 2020. Across the seven-state area, casino jobs are expected to increase by 10.7 percent, which is a slightly higher rate than nationwide. Particularly strong growth is projected for Gaming and Sports Book Writers and Runners (SOC 39-3012), which are expected to increase by 46.0 percent from 2010 to 2020. Gaming Managers (SOC 11-9071), Gaming Surveillance Officers and Gaming Investigators (SOC 33-9031), Gaming Dealers (SOC 39-3011), and Gaming Service Workers, All Other (SOC 39-3019) are all expected to increase by 12 percent or more during this time.

Figure 2.3: Regional Employment Projections for Gaming-related Occupations, 2010-2020

SOC	OCCUPATION	EMPLOYMENT		CHANGE, 2010-2020		AVERAGE ANNUAL JOB OPENINGS*
		2010	2020	NUMBER	PERCENT	
11-9071	Gaming Managers	300	340	40	13.3%	6
33-9031	Gaming Surveillance Officers and Gaming Investigators	1,207	1,354	147	12.2%	34
39-1011	Gaming Supervisors	4,347	4,516	169	3.9%	106
39-1012	Slot Supervisors	828	847	19	2.3%	17
39-3011	Gaming Dealers	9,150	10,615	1,465	16.0%	537
39-3012	Gaming and Sports Book Writers and Runners	858	1,253	395	46.0%	74
39-3019	Gaming Service Workers, All Other	490	620	130	26.5%	34
41-2012	Gaming Change Persons and Booth Cashiers	4,214	4,195	-14	-0.3%	204
43-3041	Gaming Cage Workers	1,010	1,060	50	5.0%	25
Total		22,404	24,800	2,401	10.7%	1,036

Source: State Labor Departments⁴

*Annual job openings calculated by dividing decadal job openings by 10

⁴ [1] "Occupation and Industry Projections." Delaware Department of Labor.

<http://www.delawareworks.com/ooldmi/Information/LMIDData/Projections.aspx>

[2] "Maryland Occupational Projections - 2010-2020." Maryland Department of Labor, Licensing, and Regulation.

<http://www.dlir.state.md.us/lmi/iandoproj/>

[3] "Ohio Job Outlook." Ohio Department of Job and Family Services. <http://ohiolmi.com/proj/OhioJobOutlook.htm>

[4] "Industry and Occupational Employment Projections." New Jersey Department of Labor and Workforce Development. http://lwd.dol.state.nj.us/labor/lpa/employ/indoccpj/indoccpj_index.html

[5] "Employment Projections." New York Department of Labor. <http://labor.ny.gov/stats/lproj.shtm>

[6] "Long-Term Occupational Employment Projections." Pennsylvania Department of Labor and Industry. <http://www.portal.state.pa.us/portal/server.pt?open=514&objID=814813&mode=2>

[7] "Occupational Data." Workforce West Virginia. <http://workforcewv.org/lmi/OCCUDATA.HTM>

STATE OUTLOOK

The Pennsylvania Department of Labor and Industry (PDLI) forecasts robust growth for casino-related occupations in the coming years. Casino jobs are expected to grow by 48.4 percent from 2010 to 2020, which is much higher than the average rate of 6.4 percent for all occupations. PDLI projects that Pennsylvania will add 2,250 casino jobs during this time.

As with national and regional projections, state projections suggest a particularly bright outlook for Gaming Dealers (SOC 39-3011), which are expected to increase by 70.8 percent from 2010 to 2020. Pennsylvania is expected to add 1,360 Gaming Dealers (SOC 39-3011) during this time. The PDLI forecasts strong growth for each of the nine casino occupations examined in this report, each of which is expected to increase by 16 percent or more through 2020 (Figure 2.4).

As will be described in the following sub-section, this strong projected growth is likely due to 2004 legislation that legalized gambling in the state. It should also be noted that the totals presented in Figure 2.4 do not capture the entire casino gaming market, as casinos employ a variety of occupations in addition to the SOC codes examined herein. In its most recent Annual Report, the Pennsylvania Gambling Control Board indicated that Pennsylvania's 12 casinos employed 16,644 individuals as of June 2013.⁵

Figure 2.4: State Employment Projections for Gaming-related Occupations, 2010-2020

SOC	OCCUPATION	EMPLOYMENT		CHANGE, 2010-2020		AVERAGE ANNUAL JOB OPENINGS*
		2010	2020	NUMBER	PERCENT	
11-9071	Gaming Managers	100	140	40	40.0%	6
33-9031	Gaming Surveillance Officers and Gaming Investigators	220	310	90	40.9%	12
39-1011	Gaming Supervisors	600	820	220	36.7%	33
39-1012	Slot Supervisors	300	350	50	16.7%	11
39-3011	Gaming Dealers	1,920	3,280	1,360	70.8%	219
39-3012	Gaming and Sports Book Writers and Runners	340	490	150	44.1%	29
39-3019	Gaming Service Workers, All Other	240	370	130	54.2%	24
41-2012	Gaming Change Persons and Booth Cashiers	530	660	130	24.5%	37
43-3041	Gaming Cage Workers	400	480	80	20.0%	15
Total		4,650	6,900	2,250	48.4%	386

Source: Pennsylvania Department of Labor and Industry⁶

*Annual job openings calculated by dividing decadal job openings by 10

⁵ "2012-2013 Annual Report." Pennsylvania Gaming Control Board, 2012-2013, p. 18.

http://gamingcontrolboard.pa.gov/files/communications/2012-2013_PGCB_Annual_Report.pdf

⁶ "Long-Term Occupational Employment Projections," Pennsylvania Department of Labor and Industry, Op. cit.

ANALYSIS OF PENNSYLVANIA GAMING INDUSTRY

This sub-section investigates the Pennsylvania casino gaming industry. After providing an overview of the legislative background and other recent developments, this section examines employment and revenue levels at Pennsylvania casinos and summarizes findings from a scan of current job openings at local casinos.

OVERVIEW OF DEVELOPMENT

Pennsylvania lawmakers passed the Gaming Act in 2004, which legalized casino gambling. The stated purpose of the Gaming Act is “to protect the public through the regulation and policing of all activities involving gaming, [p]rovide a significant source of new revenue to support property tax relief, wage tax reduction, [and] economic development opportunities, [and] [e]nhance the further development of the tourism market.”⁷ The Gaming Act created the Pennsylvania Gaming Control Board, (PGCB) authorized the issuance of gaming licenses, and legalized three types of slot machine casinos: harness race track and casinos, thoroughbred race track and casinos, and standalone casinos.⁸

The Gaming Act allows for 14 casino gaming licenses in the state.⁹ Pennsylvania’s first two casinos opened in 2006,¹⁰ and 12 are currently open throughout the state (Figure 2.5).¹¹ The final two casinos are in various stages of development. One of the final casinos will be in Philadelphia, as the Gaming Act designated two licenses for Philadelphia. The city’s first, SugarHouse Casino, opened in 2010¹² and PGCB is currently considering five applicants for the second.¹³

The state’s thirteenth casino is currently being developed in New Castle, Pennsylvania, which is 66 miles from Clarion University.¹⁴ Penn National Gaming, the developer, submitted its proposal for the Lawrence Downs Casino and Racing Resort to PGCB in May 2013,¹⁵ and broke ground the same month.¹⁶ However, **PCGB must still approve the application prior to opening, suggesting the opening of the casino is not imminent.**¹⁷ A key component of the application process, which typically requires nine to 12 months, will be a

⁷ Gubernick, I. C. and Vrabell, B. F. “Pennsylvania Racehorse Development and Gaming Act.” Klehr, Harrison, Harvey, and Branzburg LLP, January 2010, p. 5. <http://www.klehr.com/C7756B/assets/files/lawarticles/gubernick2.pdf>

⁸ Ibid., p. 6.

⁹ “PA Casinos, Racinos, and Resorts.” Visit PA Casinos. <http://www.visitpacasinos.com/>

¹⁰ “2006 Annual Report.” Pennsylvania Gaming Control Board, 2006, p. 2. http://gamingcontrolboard.pa.gov/files/reports/2006_PGCB_Annual_Report.pdf

¹¹ “PA Casinos, Racinos, and Resorts,” Op. cit.

¹² “About.” SugarHouse Casino. <http://www.sugarhousecasino.com/about/>

¹³ “Second License To Be Awarded Philadelphia, PA.” Visit PA Casinos. <http://www.visitpacasinos.com/Philadelphia-PA-Casino-In-Philadelphia-PA-Casinos-Pennsylvania-Casinos.html>

¹⁴ “Lawrence Downs Casino and Racing Resort New Castle, PA.” Visit PA Casinos. <http://www.visitpacasinos.com/Lawrence-Downs-Casino-And-Racing-Resort-In-New-Castle-PA-Casino-PA-Casinos-Pennsylvania-Casinos.html>

¹⁵ Ibid.

¹⁶ Lowry, N. “Public Hearing for Casino Could be in Spring.” *New Castle News*, March 2, 2014.

<http://www.ncnewsonline.com/local/x1783694957/Public-hearing-for-casino-could-be-in-spring>

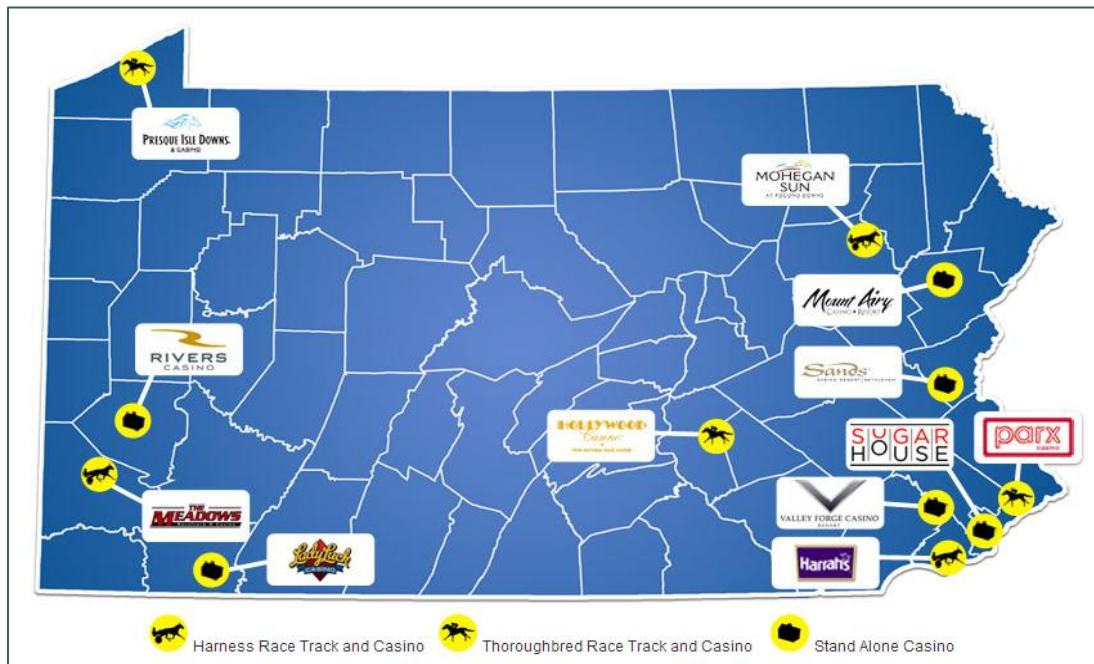
¹⁷ Ibid.

Public Input Hearing held on May 8, 2014.¹⁸ PCGB recently began accepting requests for oral and written testimony from citizens, public officials, and community groups.¹⁹

On the application, Penn National Gaming indicated the casino would create between 1,180 and 2,700 new jobs.²⁰ Lawrence Downs would include approximately “1,250 slot machines, 40 table games, [ten] poker tables and a 200-seat restaurant.”²¹ However, industry analysts assert that the development is risky. Penn National Gaming’s \$225 million proposal included a caveat that Lawrence County contributes \$50 million to the project. Experts indicate that the developers’ unwillingness to fund the entire project “is a sign that the project is too risky [and that] prospects are not lucrative enough for the private investors to participate using 100 [percent] of their own money.”²² Skeptics contend that nearby casinos may provide steep competition.

Indeed, western Pennsylvania is currently home to four casinos (Figure 2.5).

Figure 2.5: Map of Pennsylvania Casinos



Source: Pennsylvania Gaming Control Board²³

¹⁸ “Public And Government Officials Invited To Address Gaming Control Board At May 8th Public Hearing Concerning Lawrence Downs Casino And Racing Resort Gaming License Application.” Pennsylvania Gaming Control Board, March 11, 2014. <http://gamingcontrolboard.pa.gov/?pr=563>

¹⁹ Ibid.

²⁰ Cato, J. “Analysts: Lawrence County Casino Deal Risky.” *TribLive*, September 21, 2013. <http://triblive.com/state/pennsylvania/4655729-74/county-casino-million#axzz2wtbNyuOn>

²¹ Ibid.

²² Ibid.

²³ “Map of PA Casinos.” Pennsylvania Gaming Control Board. <http://gamingcontrolboard.pa.gov/?p=180>

Residents may also travel to neighboring states such as Ohio, West Virginia, and New York. The online World Casino Directory lists eight casinos in bordering states within 150 miles of Clarion University:

- Mountaineer Racetrack & Gaming Resort (Chester, West Virginia)²⁴
- Wheeling Island Racetrack and Gaming Center (Wheeling, WV)²⁵
- Seneca Allegany Casino (Salamanca, New York)²⁶
- The Village Casino (Bemus Point, New York)²⁷
- Seneca Gaming and Entertainment (Irving, New York)²⁸
- Northfield Park Racetrack and Microbrewery (Northfield, Ohio)²⁹
- Horseshoe Casino Cleveland (Cleveland, Ohio)³⁰
- Thistledown (Cleveland, Ohio)³¹

Additionally, Penn National Gaming is currently developing a casino and race track in Youngstown, Ohio, just 80 miles west of Clarion University.³² Hollywood Gaming at Mahoning Valley is currently under construction and scheduled to open in mid-2014. It will offer up to 1,500 video lottery terminals, a one mile thoroughbred racetrack, and multiple dining options.³³

REVENUE AND EMPLOYMENT LEVELS

Pennsylvania's gambling industry has grown rapidly since it was legalized in 2004, and it now generates the largest tax revenue of any state in the nation.³⁴ Nevada is the only state with a larger overall gaming market.³⁵ However, due to Pennsylvania's tax structure, the government collects a much higher proportion of revenue. For every dollar spent on slot machines, Pennsylvania government entities collect 55 cents.³⁶ PGCB indicates that "more than 16,000"³⁷ new living wage jobs have been created along with more than \$6 billion of tax

²⁴ Mountaineer Casino. <http://www.moreatmountaineer.com/>

²⁵ "Driving Directions." <http://www.wheelingisland.com/Driving-Directions.aspx>

²⁶ "Directions." Seneca Allegany Casino. <http://www.senecaalleganycasino.com/directions>

²⁷ The Village Casino. <http://www.bemuspointcasino.com/#!>

²⁸ Seneca Gaming and Entertainment. <http://www.senecagames.com/irving.html>

²⁹ "Directions." Northfield Park Racetrack and Microbrewery. <http://www.northfieldpark.com/page.aspx?PageID=/general/directions>

³⁰ Horseshoe Casino Cleveland. <http://www.horseshoecleveland.com/>

³¹ Thistledown. <http://www.thistledown.com/>

³² "About." Hollywood Gaming at Mahoning Valley. <http://www.hollywoodmahoningvalley.com/About>

³³ "Locations: Coming Soon." Penn National Gaming, Inc. <https://www.pngaming.com/Locations/Coming%20Soon>

³⁴ "PA Gambling Tax Revenue Highest in the Country." *Pennsylvania Independent*, June 1, 2012.

<http://paindependent.com/2012/06/pa-gambling-tax-revenue-highest-in-the-country/>

³⁵ "State Information." American Gaming Association. <http://www.americangaming.org/industry-resources/state-information>

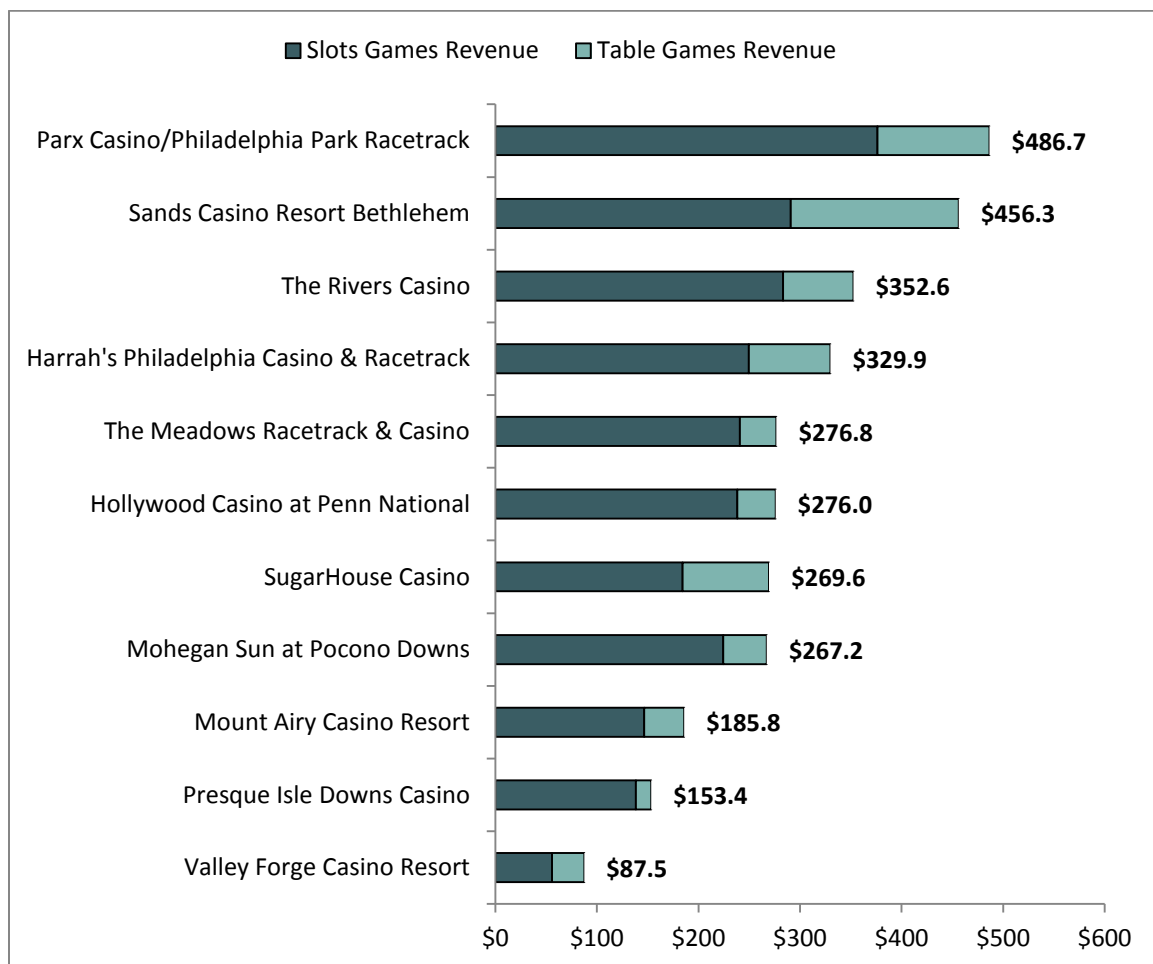
³⁶ "PA Gambling Tax Revenue Highest in the Country," Op. cit.

³⁷ Note that this figure (16,000) does not align with employment levels presented in the "State Outlook" sub-section because casinos employ a variety of occupations in addition to those SOC codes examined in this report

revenue.”³⁸ Tax revenue is directed at property tax relief, and homeowners statewide now receive an average annual tax reduction of \$200.³⁹

Parx Casino and Sands Casino, which are both in eastern Pennsylvania, are the largest casinos in the state in terms of gaming revenue and employees (Figure 2.6 and 2.7). Each of these casinos generated over \$450 million in gaming revenue in fiscal year 2012-2013, and employed over 1,800 individuals as of June 2013. In western Pennsylvania, The Rivers Casino in Pittsburgh is the largest casino in western Pennsylvania and is the third largest in the state in terms of revenue and employees. The Rivers Casino generated \$352.6 million and employed 1,782 individuals in 2013 (Figure 2.6 and 2.7).

Figure 2.6: Pennsylvania Casino Gaming Revenue, FY 2012-2013

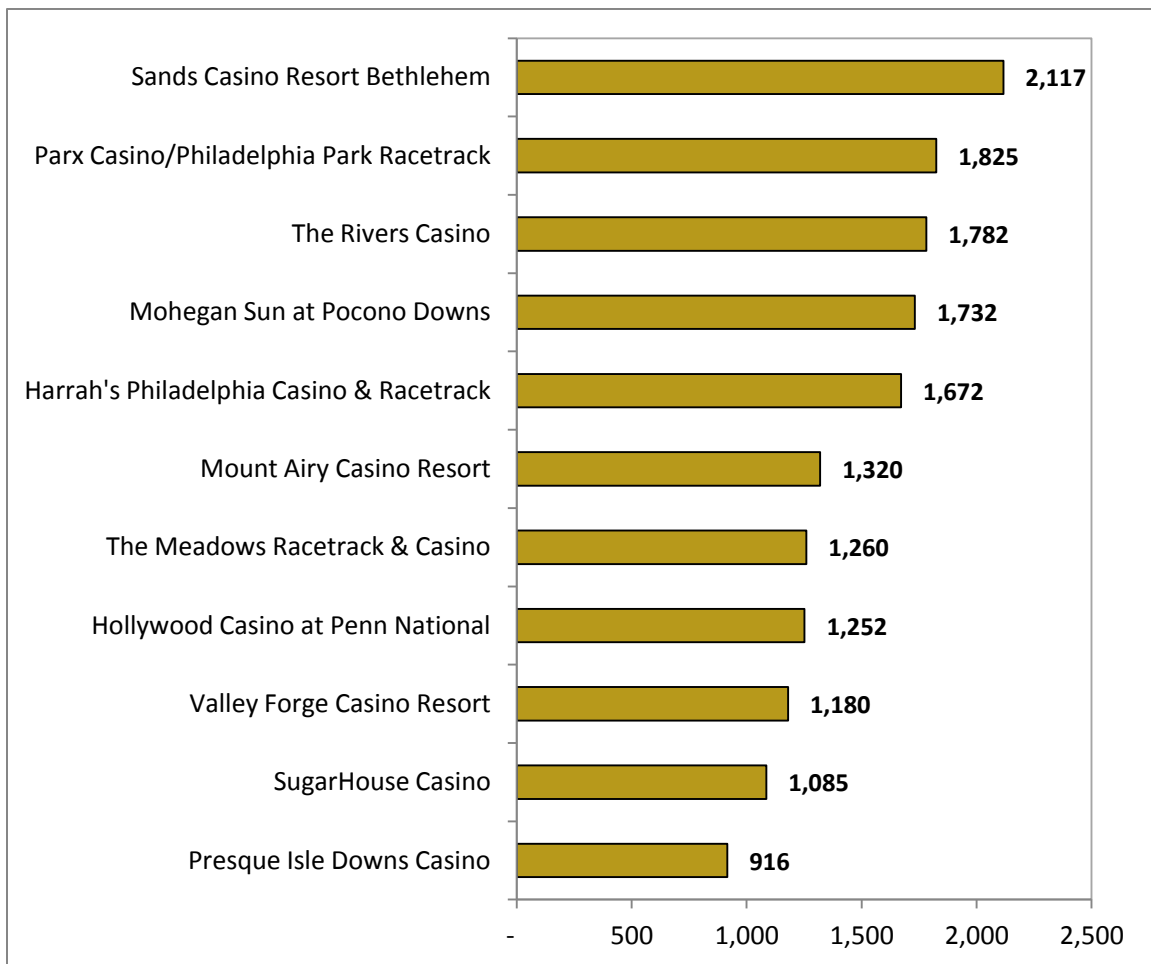


Source: Pennsylvania Gaming Control Board⁴⁰

³⁸ "Gaming Benefits for Pennsylvanians." Pennsylvania Gaming Control Board.
<http://gamingcontrolboard.pa.gov/?p=52>

³⁹ Ibid.

⁴⁰ "2012-2013 Annual Report," Op. cit., pp. 18-23.

Figure 2.7: Pennsylvania Casino Employment, June 1, 2013

Source: Pennsylvania Gaming Control Board⁴¹

CURRENT JOB VACANCIES

This sub-section analyzes current job vacancies posted by casinos near Clarion University, including:

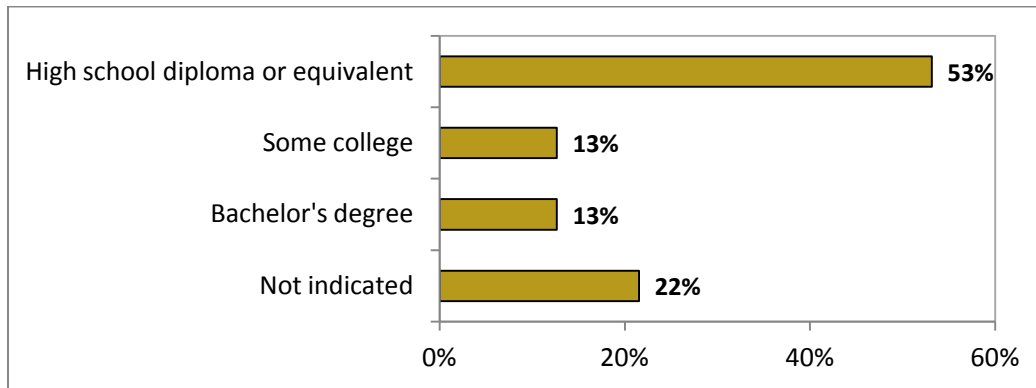
- The Rivers Casino (Pittsburgh, Pennsylvania)
- Presque Isle Downs (Erie, Pennsylvania)
- Hollywood Gaming at Mahoning Valley (Youngstown, Ohio)

As previously mentioned, Hollywood Gaming is scheduled to open summer 2014. Once completed, these three casinos will all be within 100 miles of Clarion. Appendix B at the conclusion of this report presents the entire list of openings examined, while the figures on the following pages summarize the key features of such openings. A total of 79 job postings were reviewed for this report (Figure B.1).

⁴¹ Ibid.

It appears that approximately 75 percent of vacant casino jobs in the region do not require any postsecondary education (Figure 2.8). A majority (53 percent) of listings indicated that the applicant should possess a high school diploma or equivalent. Additionally, 23 percent of listings did not indicate any type of educational requirement, suggesting about three quarters of current openings do not require any postsecondary education. Thirteen percent of openings indicated that the applicant should hold a bachelor's degree (Figure 2.8).

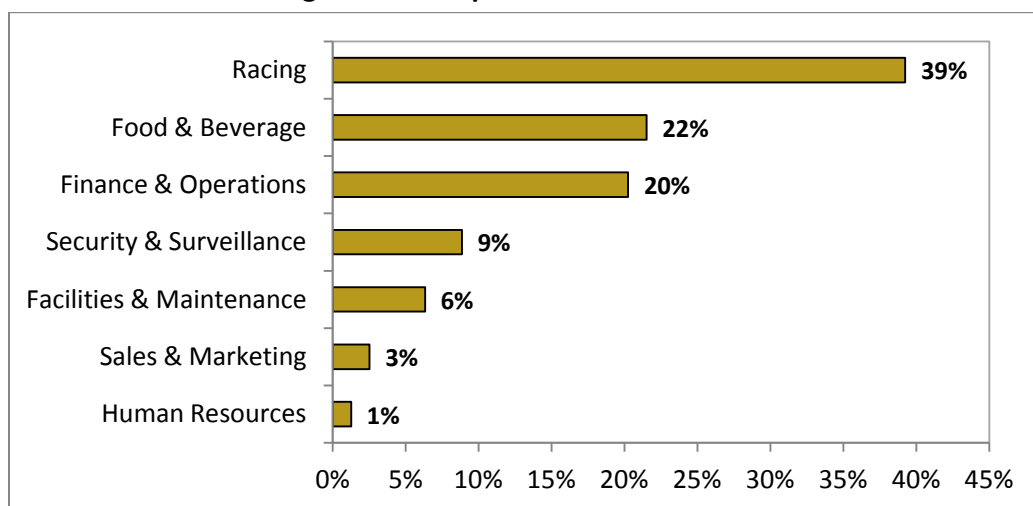
Figure 2.8: Desired Educational Attainment of Jobs Listed



Source: Casino Websites

A strong majority of open positions are in horse racing; food and beverage; or finance and operations (Figure 2.10). About 20 percent of openings were categorized as “Food & Beverage” and 20 percent were categorized as “Finance & Operations.” Nearly 40 percent of open positions deal directly with horse racing, such as stable laborers and racetrack officials. This high proportion of racing occupations may be partially because job vacancies were reviewed in March, just weeks prior to the beginning of horse racing season. Indeed, most racing positions were listed as “seasonal” (Figure B.1).

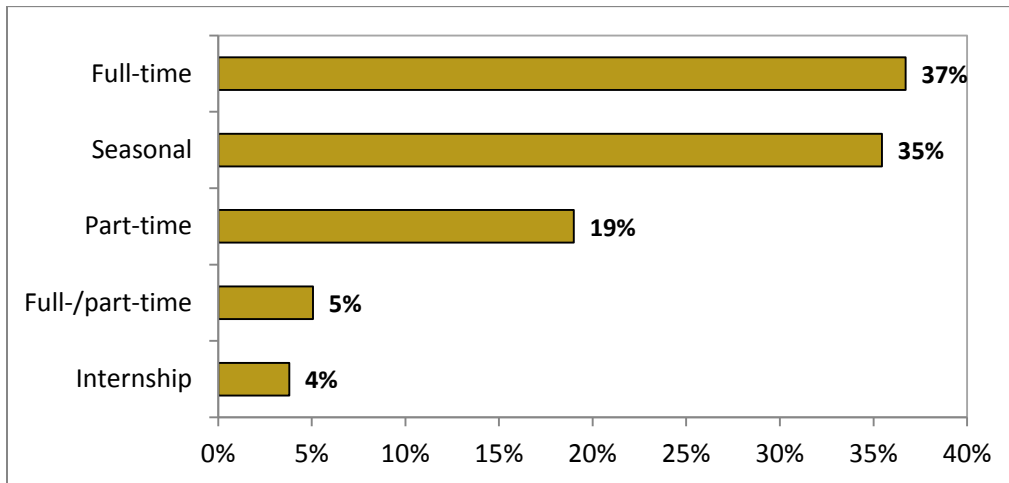
Figure 2.10: Department of Jobs Listed



Source: Casino Websites

Over half of open positions were considered seasonal or part-time jobs (Figure 2.9). Nearly 20 percent of vacancies were for part-time jobs and 35 percent were for seasonal jobs. As mentioned, seasonal jobs were highly correlated with racing jobs. Thirty-seven percent of openings were full-time jobs (Figure 2.9).

Figure 2.9: Commitment of Jobs Listed



Source: Casino Websites

SECTION III: COMPETITOR PROFILES

This section profiles three institutions that offer training programs in casino operations and management. This section examines an occupational training program and an associate's degree program at Northampton Community College, a bachelor's degree program at Central Michigan University, and a graduate certificate and a master's degree program at Drexel University. For each institution, we present degree conferral data in all relevant fields for the previous five years.

NORTHAMPTON COMMUNITY COLLEGE

Northampton Community College (NCC) in Bethlehem Township, Pennsylvania offers a variety of courses and programs focused on casino management and operations. In addition to offering an associate's degree program in hospitality management, NCC offers customized training to suit the needs of local casinos. NCC has formed a partnership with Sands Casino, which is located in the same city of Bethlehem.

CASINO TRAINING PROGRAMS

NCC "provides comprehensive training programs to help individuals enter the exciting gaming industry and to ensure casinos maintain their competitive advantage."⁴² NCC offers programs focused on table games dealing, floor supervision, casino surveillance, and casino-specific ESL training (Figure 3.1).

NCC began offering table games dealer training in March 2010, less than one year after Sands Casino opened in May 2009.⁴³ The program, which was designed specifically to meet the needs of Sands Casino, initially had capacity for 400 students. Sands Casino is listed as "Verified Casino Dealer School" by the Pennsylvania Gaming Control Board (PGCB), which indicates that Sands Casino's training program is administered by NCC.⁴⁴ Also in 2010, NCC launched a similar table games dealer program at its Monroe County campus "to accommodate the needs of Mount Airy Casino Resort," although this is not listed by PGCB.⁴⁵

A 2013 report indicated that five community colleges in Pennsylvania have offered dealer training at some point, but the number has shrunk to three: Northampton Community

⁴² "Casino Training Programs." Northampton Community College. <http://www.northampton.edu/center-for-business-and-industry/hospitality-careers/casino-training-programs.htm>

⁴³ [1] Friess, S. "A Casino Rises in the Place of a Fallen Steel Giant." *New York Times*, May 22, 2009. http://www.nytimes.com/2009/05/23/us/23casino.html?_r=0

[2] Olanoff, L. Northampton Community College Starts Table Games Classes for Sands Casino Resort Bethlehem on Monday." *Lehigh Valley News*.

⁴⁴ "Dealer School Information." Pennsylvania Gaming Control Board, January 27, 2014, p. 1. http://gamingcontrolboard.pa.gov/files/licensure/Dealer_School_Information.pdf

⁴⁵ Olanoff, Op. cit.

College, Community College of Beaver County, and Luzerne County Community College.⁴⁶ Bucks County Community College and Montgomery County Community College no longer offer training programs for table games dealing. A spokesperson for Bucks County Community College indicated that the institution ceased its training program in 2011 because local casinos in the Philadelphia area “wanted to start training their own dealers.”⁴⁷ Contrarily, Montgomery County Community College entered its partnership with Valley Forge Casino Resort with the understanding that the program would be a one-time offering in 2012. A spokesperson for Montgomery County Community College indicated that “[o]nce the casino opened, it no longer required us to provide a formal training program” and that the program “was more of a workforce training partnership than a regular program.”⁴⁸

Bob DeSalvio, President of Sands Casino, indicated in 2011 that over 60 percent of the casino’s dealers were trained by NCC.⁴⁹ While the experiences of defunct training programs suggest casino partnerships may be insecure, NCC’s early success led to the expansion of its program. In 2011, NCC began offering casino surveillance training.⁵⁰ NCC has installed a mock casino on campus to deliver industry training, and program flyers suggest that the institution is interested in pursuing partnerships with additional casinos. The surveillance program flyer indicates that:

[NCC]’s comprehensive training programs ensure casinos maintain their competitive advantage. As your training partner, we can provide customized programs delivered on your property or at our mock casino, featuring a fully equipped surveillance lab.⁵¹

The program’s website also includes a testimonial from the Sands Casino Director of Surveillance: “Together, we identified the emergent needs of the casino environment and created a program that provides the specific skills required to enter [the] field.”⁵²

Figure 3.1 summarizes the types of casino training offered by NCC. The Table Games Dealer training program, which is designed for beginners, requires 12 weeks and is offered during the day, at night, and on weekends. Once dealers have earned six months of experience, they are eligible to participate in the Experienced Dealer Training program. NCC also offers a Fundamentals of Floor Supervision program, which is “[i]deal for dealers who are serious about a casino career” (Figure 3.1). The Casino Surveillance Training program requires 64 hours of training delivered over eight weeks. NCC does not advertise the price of most

⁴⁶ Sadowski, M. “Hollywood Casino All-in on Dealer Training.” *Central Penn Business Journal*, September 27, 2013. <http://www.cpbj.com/article/20130927/CPBJ01/309279998/Hollywood-Casino-all-in-on-dealer-training>

⁴⁷ Ibid.

⁴⁸ Ibid.

⁴⁹ Butler, H. “Casino Training Programs to Expand.” Northampton Community College. <https://northampton.edu/northampton-now/casino-training-programs-to-expand.htm>

⁵⁰ Ibid.

⁵¹ “Comprehensive Training for Casino Resorts.” Northampton Community College. <http://www.northampton.edu/Documents/Business/CBICasinoTraining.pdf>

⁵² “Testimonial: David Terry, Director of Surveillance, Sands Casino Resort.” Northampton Community College. http://www.northampton.edu/Documents/Business/Testimonials/cbi_testimonial_Terry.pdf

programs, but indicates that the surveillance training course is \$600.⁵³ Lastly, NCC offers a 21 hour English language training course designed for ESL employees.

Figure 3.1: Types of Casino Training offered by Northampton Community College

TYPE OF TRAINING	DESCRIPTION
Table Games Dealer Training	<ul style="list-style-type: none"> 12 week training program Offered during the day, evening, and weekends Taught by facilitators with extensive casino experience
Experienced Dealer Training	<ul style="list-style-type: none"> Participants must have six months of dealing experience Classes delivered at NCC's mock casino Courses are available in Baccarat, Roulette, Craps, Pai Gow Poker, Pai Gow Tiles, and Poker
Fundamentals of Floor Supervision	<ul style="list-style-type: none"> Ideal for dealers who are serious about a casino career and have at least six months of table games experience Courses include: <ul style="list-style-type: none"> "My Section is the Place Everyone Wants to Be!" focuses on customer satisfaction, motivating dealers, and handling conflicts "Ready for Responsibility" focuses on key responsibilities of floor supervisors and managing table games
Casino Surveillance Training	<ul style="list-style-type: none"> 8 week, 64 hour training program Taught by instructor with over 20 years of industry experience Focuses on how surveillance is used to protect the casino and patrons, how to identify patterns of suspicious, how to interrogate
ESL Basic Spoken English for the Casino Industry	<ul style="list-style-type: none"> 21 hour course Addresses participants' ability to understand and confidently interact with guests and casino management

Source: Northampton Community College⁵⁴

ASSOCIATE'S DEGREE PROGRAM

In addition to tailor-made casino training, Northampton Community College offers an Associate in Applied Science in Hospitality Management.⁵⁵ The program prepares individuals "to gain entry-level management positions in restaurants, hotels, and several hundred other hospitality related careers." Candidates choose from three tracks: Restaurants, Hotel, or Meeting and Event Planning.⁵⁶ While each of the three tracks is relevant to the casino industry, NCC suggests the hotel concentration may be most suitable.⁵⁷

Students pursuing the associate's degree in Hospitality Management "will be prepared for a career in the hospitality industry by classroom learning supplemented with field trips, guest speakers and industry certifications."⁵⁸ Students complete a 225 hour management

⁵³ "Casino Surveillance Program." Northampton Community College.

http://www.northampton.edu/Documents/Business/NCC_CasinoSurveillanceSpr14.pdf

⁵⁴ "Casino Training Programs," Op. cit.

⁵⁵ "Hospitality Management - A.A.S. Degree." Northampton Community College.

<http://catalog.northampton.edu/Programs-and-Majors/Hospitality-Management.htm>

⁵⁶ Ibid.

⁵⁷ [1] Ibid.

[2] Butler, Op. cit.

⁵⁸ "Hospitality Management - A.A.S. Degree," Op. cit.

practicum that includes a culminating internship. NCC indicates that students will attain learning outcomes related to industry knowledge, technical skills, and leadership skills:

- Acquire and correctly use general industry information, technical skills, and certifications for employment in the hospitality industry.
- Listen and effectively communicate in a positive, professional, and ethical manner with customers and colleagues of diverse backgrounds.
- Display a professional image, positive attitude, strong work ethic, and recognize your role in the success of the organization where you are employed.
- Read and accurately interpret standard indicators of the organization's financial health.
- Use appropriate technology for written communication, information gathering, and data analysis to facilitate smooth operation of a hospitality organization.
- Demonstrate leadership and supervisory skills, and an appreciation of diversity to support the organization and its goals.
- Use organization and flexibility, as a team, to complete tasks, make decisions, and problem solve in a timely manner.
- Utilize research and problem-solving techniques to employ "out of the box" critical thinking skills in a variety of hospitality situations.⁵⁹

Students must complete between 66 and 69 credits to earn the associate's degree. The curriculum includes five or six classes per semester and includes courses in communication, customer service, accounting, law, human resources, and leadership (Figure 3.2).

Figure 3.2: Northampton Community College Hospitality Management Curriculum

CURRICULUM (CREDITS)	
Semester One (15-16)	
<ul style="list-style-type: none"> ■ Speech Communication (3) ■ English I (3) ■ Introduction to the Hospitality Industry (3) 	<ul style="list-style-type: none"> ■ Enhancing Guest Service (3) ■ Mathematics OR Science Elective (3-4)
Semester Two (18-19)	
<ul style="list-style-type: none"> ■ Accounting for Non-Accountants OR Financial Accounting I (3) ■ English II (Report Writing) (3) ■ Hospitality Sales and Marketing (3) 	<ul style="list-style-type: none"> ■ Food and Beverage Management (3) ■ Rooms Division Management (3) ■ Program Elective (3-4)
Semester Three (15-16)	
<ul style="list-style-type: none"> ■ Human Resources Management for the Hospitality Industry (3) ■ Hospitality Financial Reporting (3) 	<ul style="list-style-type: none"> ■ Hospitality Law (3) ■ Program Elective (3-4) ■ General Education Elective (3)
Semester Four (18)	
<ul style="list-style-type: none"> ■ Convention Services & Catering Management (3) ■ Strategic Leadership in Hospitality (3) ■ Hospitality Management Practicum (3) 	<ul style="list-style-type: none"> ■ Introduction to Psychology (3) ■ General Education Elective (3) ■ Program Elective (3)

Source: Northampton Community College⁶⁰

⁵⁹ Taken verbatim from: Ibid.

Although the core requirements do not include casino courses, students may choose electives best suited for the gaming industry. For instance, NCC offers a three-credit course titled “Introduction to the Gaming Industry” that focuses on industry trends, the history of gaming, and casino operations:

This course provides an overview of casino management with an emphasis on the analysis of the gaming industry and its trends, a casino's interface with the hotel, organizational structure and terminology. Students will learn the history of gaming, various types of games, daily casino operations, casino marketing and financing, government regulations of gambling and the future development of the industry.⁶¹

NCC charges a flat semester rate for students enrolled in 12 to 18 credits and charges different rates depending on residency. Including mandatory fees, the flat rate for the 2014-2015 school year is \$1,920 for Northampton County residents, \$3,180 for Monroe County Residents, \$4,200 for residents of other Pennsylvania counties, and \$6,210 for out-of-state residents.⁶²

DEGREE COMPLETIONS

IPEDS data indicate that degree completions in NCC’s hospitality management associate’s degree programs have remained steady over the previous five years. NCC awarded 18 associate’s degrees in Hospitality Administration/Management (CIP 52.09) in 2008 and 17 degrees in 2012, suggesting student demand has neither increased nor decreased (Figure 3.3). Note that completions data for NCC’s casino training programs are not available and thus not included in Figure 3.3.

Completions data indicate that NCC also offers programs in Culinary Arts/Chef Training (CIP 12.0503) and Accounting Technology/Technician and Bookkeeping (CIP 52.0302) that are relevant to the casino gaming industry. Indeed, reports indicate that Sands Casino has hired graduates of NCC’s culinary training programs.⁶³ Degree conferrals in Accounting Technology/Technician and Bookkeeping (CIP 52.0302) increased substantially at the pre-baccalaureate certificate and associate’s degree level over the previous five years, while degree conferrals in Culinary Arts/Chef Training (CIP 12.0503) decreased at both award levels during the same time (Figure 3.3).

⁶⁰ Ibid.

⁶¹ “Northampton Community College Catalog 2013-2014: Hotel Management (HOTL).” Northampton Community College. [http://catalog.northampton.edu/Course-Descriptions/Hotel-Management-\(HOTL\).htm](http://catalog.northampton.edu/Course-Descriptions/Hotel-Management-(HOTL).htm)

⁶² “Tuition and Fees: Summer 2014 - Spring 2015.” Northampton Community College. <http://www.northampton.edu/student-resources/bursar/tuition-and-fees/tuition-and-fees/summer-2014-spring-2015.htm>

⁶³ Butler, Op. cit.

Figure 3.3: Northampton Community College Completions, 2008-2012

FIELD	2008	2009	2010	2011	2012	TOTAL	CAGR
Pre-baccalaureate certificate							
12.0503 Culinary Arts/Chef Training	22	25	15	24	20	106	-2.4%
52.0302 Accounting Technology/Technician and Bookkeeping	6	3	11	18	16	54	27.8%
52.0901 Hospitality Administration/Management, General	--	--	--	--	1	1	--
52.0906 Resort Management	--	--	--	--	2	2	--
Pre-baccalaureate Certificate Total	28	28	26	42	39	163	8.6%
Associate's degree							
12.0503 Culinary Arts/Chef Training	21	15	21	20	18	95	-3.8%
52.0302 Accounting Technology/Technician and Bookkeeping	23	19	31	32	32	137	8.6%
52.0904 Hotel/Motel Administration/Management	9	5	8	9	8	39	-2.9%
52.0905 Restaurant/Food Services Management	9	7	5	8	9	38	0.0%
52.1906 Tourism Promotion Operations	2	--	--	--	--	2	--
Associate's Degree Total	64	46	65	69	67	311	1.2%
Total	92	74	91	111	106	474	3.6%

Source: IPEDS

CENTRAL MICHIGAN UNIVERSITY

Central Michigan University (CMU) is located in Mount Pleasant, Michigan, in the same city as the largest casino in the state, the Soaring Eagle Casino and Resort.⁶⁴ CMU offers a bachelor's degree in Hospitality Services Administration with a concentration in Gaming and Entertainment Management.⁶⁵ CMU's program was identified by Hanover Research because it is the only institution in the nation that has reported degree completions to IPEDS under Casino Management (CIP 52.0908) since the program classification was introduced in 2010.⁶⁶

BACHELOR'S DEGREE PROGRAM

CMU's hospitality services administration program "offers a sound business background and a specific orientation toward the management of lodging operations, restaurants, clubs, and tourism."⁶⁷ The Gaming and Entertainment Management concentration is designed to prepare individuals for a career as:

- Banquet Executive
- Casino Manager

⁶⁴ [1] "Michigan Casinos." World Casino Directory. <http://www.worldcasinodirectory.com/michigan>

[2] "Indian Gaming Section Annual Report to the Citizens of Michigan." Michigan Gaming Control Board, 2012, p. 9. http://www.michigan.gov/documents/mgcb/Annual_Report_-_Indian_Gaming_2012_Final__423303_7.pdf

⁶⁵ "Hospitality Services Admin. Major: Gaming & Entertainment Management Concentration." Central Michigan University.

https://go.cmich.edu/academics/Undergraduate/Find_Program/Pages/Hospitality_Serv_Admin_Gaming.aspx

⁶⁶ "IPEDS," Op. cit.

⁶⁷ "Hospitality Services Admin. Major," Op. cit.

- Catering Consultant
- Club Owner
- Comptroller
- Food and Beverage Director
- Hotel General Manager
- Sales and Marketing Director
- Special Events Coordinator
- Tourism Planning Specialist⁶⁸

Out of the 124 credit hours required for a bachelor's degree at CMU,⁶⁹ students enrolled in the Gaming and Entertainment program must complete 37 credit hours toward the major and concentration (Figure 3.4). The requirements include a set of business administration courses, core hospitality management courses, required gaming courses, and elective gaming courses.

While CMU provides business, management, and general hospitality management courses on its main campus, **students must complete four casino-specific courses in Las Vegas, Nevada through a partnership with the University of Nevada Las Vegas.**⁷⁰

Figure 3.4: Central Michigan University Curriculum

CURRICULUM	
<i>Required Business Administration Courses (9 Credits)</i>	
▪ Essential Business Skills	▪ Integrated Capstone-Strategic Management
▪ Applied Business Statistics	
<i>Core Courses (12 Credits)</i>	
▪ Introduction to Hospitality Services Administration	▪ Financial Management in the Hospitality Service Sector
▪ Lodging Operations	▪ Management in the Hospitality Service Sector
<i>Required Courses (13 Credits)</i>	
▪ Casino Operation and Management	▪ Gaming Regulations and Control
▪ Protection of Casino Table Games	▪ Independent Studies (1-6 credits)
<i>Electives (Choose on for 3 Credits)</i>	
▪ Accounting for the Hotel Casino	▪ Seminars in Casino Management
▪ Mathematics of Casino Games	▪ Sociology of Gambling

Note: Courses denoted as "UNLV" must be completed at the University of Nevada Las Vegas. All courses are three credits unless noted.

CMU charges a per-credit rate that is different for in-state students and out-of-state students. For school year 2013-2014, Michigan residents pay \$374 per undergraduate credit and out-of-state students pay \$789 per credit.⁷¹ CMU's program webpage for the Gaming

⁶⁸ Ibid.

⁶⁹ "Requirements for Graduation." Central Michigan University. <https://bulletins.cmich.edu/2012/ug/gen-acad/graduation-req.asp>

⁷⁰ "Hospitality Services Admin. Major," Op. cit.

⁷¹ "Tuition and Fees." Central Michigan University. https://www.cmich.edu/ess/registrar/RegistrarRegistration/Pages/Tuition_and_Fee_Schedule.aspx

and Entertainment concentration does not indicate whether additional fees are associated with courses completed through UNLV.⁷²

DEGREE COMPLETIONS

Degree completions data suggest increasing student demand for CMU's Hospitality Administration/Management (CIP 52.09) programs. CMU reported one bachelor's degree award for Casino Management (CIP 52.0908) in 2010, which was the year the classification was introduced by IPEDS, and two awards in 2011 and 2012. Additionally, CMU has reported 140 bachelor's degree conferrals in Hospitality Administration/Management, General (CIP 52.0901) of the previous five years. Bachelor's degree completions in Hospitality Administration/Management (CIP 52.09) programs increased from 19 in 2008 to 45 in 2012.

Figure 3.5: Central Michigan University Degree Completions, 2008-2012

FIELD	2008	2009	2010	2011	2012	TOTAL	CAGR
52.0301 Accounting	93	74	97	106	82	452	-3.1%
52.0901 Hospitality Administration/ Management, General	19	24	28	26	43	140	22.7%
52.0908 Casino Management	--	--	1	2	2	5	--
Total	112	98	126	134	127	597	3.2%

Source: IPEDS

DREXEL UNIVERSITY

Drexel University Online offers a Graduate Certificate in Gaming and Casino Operations,⁷³ as well as a Master of Science in Hospitality Management with a concentration Gaming and Casino Management.⁷⁴

GRADUATE CERTIFICATE PROGRAM

The Graduate Certificate in Gaming and Casino Operations "is designed to provide students with the knowledge, skills, and abilities to become competent executives in a casino resort."⁷⁵ The program is "ideal for those interested in a new career in the casino industry or for those existing casino employees looking to advance into higher levels of management."⁷⁶ The program is delivered entirely online.

Drexel's certificate program consists of six courses worth three credits each, for a total of 18 required credits.⁷⁷ Drexel indicates that the program can be completed part-time in one

⁷² "Hospitality Services Admin. Major," Op. cit.

⁷³ "Graduate Certificate in Gaming and Casino Operations: Overview." Drexel University Online. <http://www.drexel.com/online-degrees/business-degrees/grad-cert-gaming-casino/index.aspx>

⁷⁴ "Online Master's in Hospitality Management: Overview." Drexel University Online. <http://www.drexel.com/online-degrees/business-degrees/ms-hospitality-management/index.aspx>

⁷⁵ "Graduate Certificate in Gaming and Casino Operations: Overview," Op. cit.

⁷⁶ Ibid.

⁷⁷ "Graduate Certificate in Gaming and Casino Operations: Curriculum." Drexel University Online. <http://www.drexel.com/online-degrees/business-degrees/grad-cert-gaming-casino/curriculum.aspx>

year by taking two courses per term for three consecutive terms. However, candidates must complete five undergraduate prerequisite courses prior to the beginning of the program:

- Financial Accounting Foundations
- Hospitality Accounting Systems
- Introduction to Analysis I⁷⁸
- Introduction to the Hospitality Industry
- Hotel Room Division Management

The six required courses for the graduate certificate cover gaming industry knowledge, strategic management, gaming technology systems, current issues in the casino industry, casino financial analysis, and casino marketing (Figure 3.6).

Figure 3.6: Drexel Online Graduate Certificate Curriculum

COURSE	DESCRIPTION
Foundations of the Hospitality Industry	This is a gateway course to provide students of various backgrounds the information and conceptual tools needed to grasp the fundamentals of the global hospitality industry as understood in its widest sense. Students will become familiar with the production and distribution of hospitality products. Trends in the industry will also be discussed.
Destination and Resort Management	A study of destination and resort management from a global perspective including strategic planning and competitive analysis of domestic and international resort destinations. Students will study the various aspects of resort management in the context of high levels strategic planning that includes market research, market positioning, feasibility studies, and revenue forecasting for resort destinations.
Gaming Information Systems	Covers the use of technology and computer information systems in the casino industry. The course emphasizes high level strategic planning for leveraging technology and information systems to gain competitive advantage and improve a casino's position in the marketplace. Includes structured decision making in the acquisition and implementation of technology including feasibility analysis and financial forecasting.
Current Issues in Gaming	This course will examine current issues in the casino and gaming industry. An in-depth examination of trends, policies, and impacts on gaming operations with an emphasis on casino operations will be potential topics for discussion.
Casino Financial Analysis	This course covers the unique aspects of analyzing the financial results of casino programs and product offerings, including marketing promotion analysis, special even manifest analysis, player development, executive profit and loss, table game mix, and slot floor product and position analysis. Volume forecast methods will also be studied.
Casino Marketing	This course covers the unique aspects of casino marketing including player loyalty programs, promotional strategies, customer relationship marketing, branding, database marketing, player development and junket programs. The course is taught from a global perspective with an emphasis on strategy and positioning in the marketplace.

Source: Drexel University Online⁷⁹

⁷⁸ Ibid.

⁷⁹ Ibid.

Drexel Online charges all students \$1,123 per credit for graduate courses for school year 2014-2015, which means the total cost of the 18 credit program is \$20,214.⁸⁰

MASTER'S DEGREE PROGRAM

Drexel's Master's in Hospitality Management "provides students with the skills needed to advance in the hospitality industry."⁸¹ Candidates choose a concentration in Global Tourism or in Gaming and Casino Management. The program is designed to prepare graduates for career paths in:

- Senior management of hotels and resorts
- Convention services
- Strategic development for online distribution of travel services
- Real estate development projects and
- Business ownership⁸²

Students must earn 45 graduate credits to earn the master's degree, including 12 credits of core courses in professional studies, 21 credits of hospitality management courses, and 12 credits of gaming and casino management courses (Figure 3.7). The casino and management courses are similar to those required for Drexel's graduate certificate program. However, master's degree students also have the option to complete Tribal Gaming Management and Security and Risk and Management.

Figure 3.7: Drexel Online Master's Degree Curriculum

CURRICULUM	
<i>Professional Studies Core Courses (12 Credits)</i>	
<ul style="list-style-type: none"> ■ Foundations in Creativity ■ Introduction to Project Management 	<ul style="list-style-type: none"> ■ Ethics for Professionals ■ Research Methods & Statistics
<i>Hospitality Management Required Courses (21 Credits)</i>	
<ul style="list-style-type: none"> ■ Foundations of the Hospitality Industry ■ Hospitality Management Information Systems ■ Strategic Management & Leadership 	<ul style="list-style-type: none"> ■ Hospitality Human Resource Management ■ Customer Service for Professionals ■ Research Project (1-12 credits)
<i>Gaming and Casino Management Concentration (Choose 4 for 12 Credits)</i>	
<ul style="list-style-type: none"> ■ Destination and Resort Management ■ Gaming Information Systems ■ Current Issues in Gaming ■ Casino Financial Analysis 	<ul style="list-style-type: none"> ■ Security and Risk Management ■ Tribal Gaming Management ■ Casino Marketing

Source: Drexel University Online⁸³

Note: All courses are three credits unless noted.

⁸⁰ "Graduate Certificate in Gaming and Casino Operations: Tuition." Drexel University Online.

<http://www.drexel.com/online-degrees/business-degrees/grad-cert-gaming-casino/tuition.aspx>

⁸¹ "Online Master's in Hospitality Management: Overview," Op. cit.

⁸² Taken verbatim from: Ibid.

⁸³ "Online Master's in Hospitality Management: Curriculum." Drexel University Online.

<http://www.drexel.com/online-degrees/business-degrees/ms-hospitality-management/curriculum.aspx>

As previously mentioned, Drexel charges all students \$1,123 per credit for graduate courses for school year 2014-2015.⁸⁴

DEGREE COMPLETIONS

Drexel first reported master's degree conferrals in Hospitality Administration/ Management (CIP 52.09) in 2012, when it reported 10 completions (Figure 3.8). However, it is not clear that these awards correspond with Drexel's Gaming and Casino Management master's program because the completions were reported under Hotel/ Motel Administration/ Management (CIP 52.0904), rather than Casino Management (CIP 52.0908). Drexel does not advertise a separate master's degree program for hotel management.⁸⁵

Figure 3.8: Drexel University Degree Completions

FIELD	2008	2009	2010	2011	2012	TOTAL	CAGR
Bachelor's Degrees							
12.0503 Culinary Arts/Chef Training	5	6	7	12	4	34	-5.4%
52.0904 Hotel/Motel Administration/Management	--	1	3	10	14	28	--
52.0999 Hospitality Administration/Management, Other	22	27	19	16	3	87	-39.2%
Bachelor's Degrees Total	27	34	29	38	21	149	-6.1%
Master's Degrees							
52.0301 Accounting	5	10	11	24	15	65	31.6%
52.0904 Hotel/Motel Administration/Management	--	--	--	--	10	10	--
Master's Degrees Total	5	10	11	24	25	75	49.5%
Total	32	44	40	62	46	224	9.5%

Source: IPEDS

⁸⁴ "Online Master's in Hospitality Management: Tuition." Drexel University Online. <http://www.drexel.com/online-degrees/business-degrees/ms-hospitality-management/tuition.aspx>

⁸⁵ "All Graduate Programs." Drexel University. <http://www.drexel.edu/grad/programs/list/>

PROJECT EVALUATION FORM

Hanover Research is committed to providing a work product that meets or exceeds partner expectations. In keeping with that goal, we would like to hear your opinions regarding our reports. Feedback is critically important and serves as the strongest mechanism by which we tailor our research to your organization. When you have had a chance to evaluate this report, please take a moment to fill out the following questionnaire.

<http://www.hanoverresearch.com/evaluation/index.php>

CAVEAT

The publisher and authors have used their best efforts in preparing this brief. The publisher and authors make no representations or warranties with respect to the accuracy or completeness of the contents of this brief and specifically disclaim any implied warranties of fitness for a particular purpose. There are no warranties which extend beyond the descriptions contained in this paragraph. No warranty may be created or extended by representatives of Hanover Research or its marketing materials. The accuracy and completeness of the information provided herein and the opinions stated herein are not guaranteed or warranted to produce any particular results, and the advice and strategies contained herein may not be suitable for every partner. Neither the publisher nor the authors shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages. Moreover, Hanover Research is not engaged in rendering legal, accounting, or other professional services. Partners requiring such services are advised to consult an appropriate professional.



1700 K Street, NW, 8th Floor
Washington, DC 20006

P 202.559.0500 F 866.808.6585
www.hanoverresearch.com