

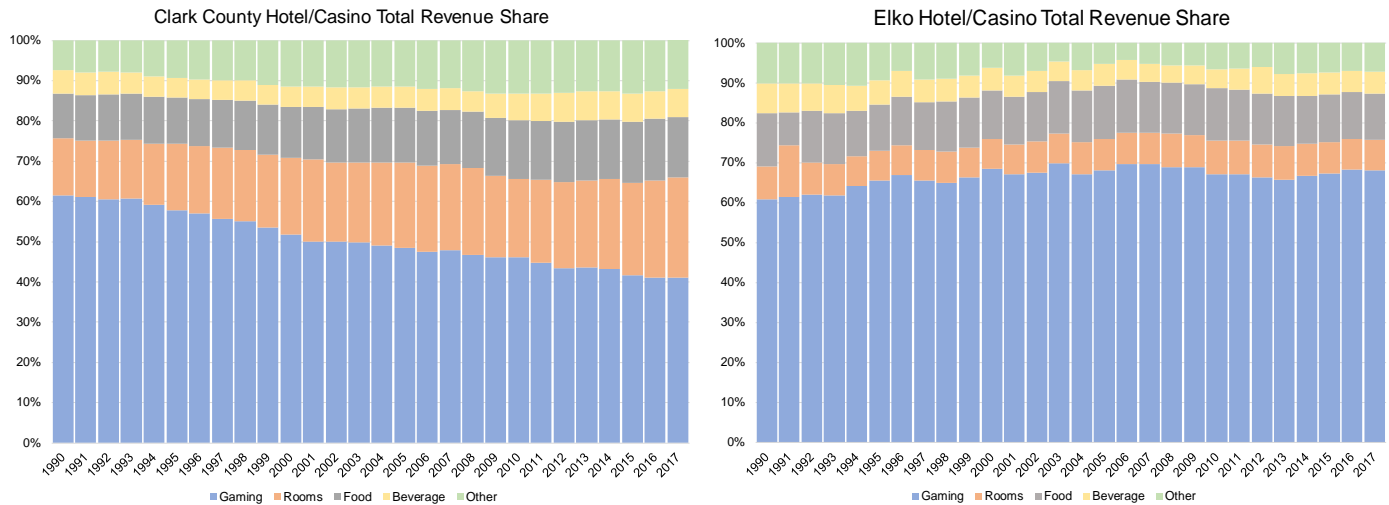
# Research Notes



Clark vs Elko County Hotel/Casino Revenues  
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## Hotel/Casino Gaming Revenue as a Share of Total Revenue Decline in Clark and Increase in Elko



- The Nevada Game Control Board produces an annual report entitled “The Abstract Report” which is a financial analysis of non-restricted gaming licensees producing one million dollars or more in gaming revenue (July-June). This report is available in mid-January for the prior fiscal year. This month we compare total revenue by four major departments on the income statement (Gaming, Rooms, Food, Other Services) in Clark and Elko counties’ hotel/casinos producing at least one million dollars in gaming revenue.
- Clark County, the State’s most populous county, is known for its high volumes of tourism and world class hotel/casinos. Elko County, located in a more rural geography, ranks fourth in population in the State and contains smaller hotel/casinos that cater to both locals and tourist.
- In the early 90’s gaming revenue in Clark County’s hotel/casinos accounted for a 60% share of total revenue. Since then, gaming’s share of total revenue in these establishments have steadily decreased over time resulting in larger revenue increases in other non-gaming departments such as food, beverage, rooms, and other services. In 2017, non-gaming departments accounted for a share of nearly 60% of total revenue versus gaming’s 40%. Consumer spending has shifted in this market, from what was once predominately concentrated on gaming, to alternative forms of leisure and hospitality.
- Similar to Clark County, Elko County’s gaming revenue in hotel/casinos accounted for a 60% share of total revenue in the early 90’s versus non-gaming departments 40%. However, unlike Clark County, gaming’s share of total revenue in Elko County has marginally increased over time, reaching 68% of total revenue in 2017.
- All told, as gaming has become more prolific nationwide, Clark County has started to diversify revenue sources and capture consumer spending in alternative departments while Elko County has maintained a more traditional structure.

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