



**THE AMERICAN
GAMING
ASSOCIATION**

**PAST,
PRESENT
AND FUTURE**

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FOREWORD

The mission of the American Gaming Association (AGA), founded in 1994, has always been to advocate for gaming interests at national, state and local levels across the U.S. Per the AGA's website:

"THE AMERICAN GAMING ASSOCIATION IS THE PREMIER NATIONAL TRADE GROUP REPRESENTING THE \$261 BILLION U.S. CASINO INDUSTRY, WHICH SUPPORTS 1.8 MILLION JOBS NATIONWIDE. AGA MEMBERS INCLUDE COMMERCIAL AND TRIBAL CASINO OPERATORS, GAMING SUPPLIERS AND OTHER ENTITIES AFFILIATED WITH THE GAMING INDUSTRY.

IT IS THE MISSION OF THE AGA TO ACHIEVE SOUND POLICIES AND REGULATIONS CONSISTENT WITH CASINO GAMING'S MODERN APPEAL AND VAST ECONOMIC CONTRIBUTIONS."

What makes the AGA exceptional amongst many contemporary associations is that the playing field of gaming has changed so much over the last 120 years. From the late 1800's when wagers were made in bars in New York City, almost every single aspect of gaming has evolved drastically:

- Rules and regulations
- Technology
- Popular perception and acceptance
- Where and how gaming takes place

In the following interviews, I'll provide insight and perspective from former CEOs, Frank Fahrenkopf, Geoff Freeman and Stacy Papadopoulos as well as from the new CEO of the AGA, Bill Miller on the gaming equation they faced (or are facing) coming into their roles as CEO of the organization.

With each, I'll explore a broad range of subjects including, the popular perception of gaming at the time they entered the industry, how they came to the industry, the regulatory and legislative environment at the time, as well as what they see in the future of the AGA.

The intent here is to trace a line through 25 years of AGA leadership to explore how this organization has transformed gaming across the United States.



FRANK J. FAHRENKOPF JR.

AGA CEO FROM 1995-2013

You were the founder of the American Gaming Association. How did the AGA and your role as CEO come about?

Fahrenkopf, "I practiced gaming law in Nevada long before the AGA was created. My law firm was in Reno, however I traveled to Carson City and Las Vegas often to appear before the Gaming Control Board and Gaming Commission representing clients'. The most noteworthy, I guess, was representing Wayne Newton for the acquisition of the Aladdin Hotel."

Fahrenkopf continued, "When a group of gaming attorneys got together in New York in or around 1983, we realized the opportunity for a collection of lawyers who practice in the gaming field to create a difference in the industry. From this, we created an organization called, the Nevada Association of Gaming Attorneys, NAGA. We persuaded other stakeholders in the industry to get involved and even influenced the American Bar Association (ABA) to create a special section of the ABA on gaming law, where none had previously existed. NAGA eventually became the National Association of Gaming Attorneys when New Jersey gaming was established, and then it became IAGA, the International Association of Gaming Attorneys, which still exists today as the International Association of Gaming Advisors because they now

allow professionals outside of the legal profession to join."

Fahrenkopf elaborated, "So before the idea of the AGA had even come around, I'd spent a considerable amount of time on gaming matters. Where the AGA comes in is only after one of my best friends, Raymond 'Skip' Avansino Jr., who was the president of Hilton Hotels, was attending a Hilton board meeting in Washington, D.C., where I was practicing law at that time. We got together and spoke about the growth of casino gaming and the need for association representation before Congress and the White House to make sure the Federal Government doesn't intentionally or unintentionally do something that really hurts the industry. Shortly thereafter, political winds blew against gaming with the Treasury Department idea to tax all gaming revenue at 3% to fund healthcare reform. This got the attention of a lot of people in the industry and prompted the decision between Barron Hilton, 'Skip' Avansino and other industry leaders that there should be created exactly this sort of an organization. They retained me to write the legal documents establishing the American Gaming Association."

Speaking to his leadership of the AGA, Fahrenkopf continued, "When the question of leading the organization came up, I

FRANK J. FAHRENKOPF JR. CONTINUED

was approached by Barron and Skip, but deferred as I was very busy with my law practice at that juncture. They then created a three-person committee, that ended up being, Mr. Avansino from Hilton, Chuck Mathewson, who at that time was the head of IGT and Steve Wynn. Approximately 200 people applied for the position, including a former United States Senator, a former Congressman and a former federal judge, however this three-person committee ultimately couldn't find someone with the industry experience they were seeking.

At the conclusion of about three months, those three came back to me and simply asked, 'Do it for one year... get us started.' Eighteen years later, I retired."

What was a key challenge for you and the industry at that point?

Fahrenkopf, "What's remarkable is that we faced immediate pushback. July 1 of 1995, day-one of the AGA, there was a bill in the U.S. Congress with 165 co-signers in the House of Representatives to study the NEGATIVE impact of gaming on the American people. It had bipartisan support. It was led in the House by a GOP congressman named Frank Wolf, and in the Senate by a democratic United States Senator from Illinois, named Paul Simon.

AT THE CONCLUSION OF ABOUT THREE MONTHS, THOSE THREE CAME BACK TO ME AND SIMPLY ASKED, 'DO IT FOR ONE YEAR... GET US STARTED.' EIGHTEEN YEARS LATER, I RETIRED.

There was no question that their goal was to see gaming outlawed in the United States with the support of the religious right."

Without pausing for dramatic effect, Fahrenkopf continued: "That was my first day on the job."

What strategies did you employ when faced with this overwhelming opposition?

"From experience, I knew that owning, or at least influencing the narrative was going to be key to keeping gambling legal in the U.S.

First, we did our best to impact who served on the National Gambling Impact Study Commission. Secondly, we went with this commission to represent the industry anywhere and everywhere they were

FRANK J. FAHRENKOPF JR. CONTINUED

asking questions and holding hearings around the country. Eventually, we got this commission to change the focus of their study away from solely looking for the negative impacts of gaming to ALSO studying the positive effects that gaming was having on communities in terms of taxes and employment. To say that none of this happened overnight is an understatement. This effort and exhaustive travel were my first two to three years leading the organization.”

What is one of your proudest achievements at the AGA?

Fahrenkopf explained, “I wasn’t attending these commission hearings with the sole intention of shining a light on the positives of the industry; I was also there to learn more about the entire equation, and this included the negatives, the myths and popular perceptions of gaming. The insight I gained from these hearings led to one of the things I’m most proud of, the establishment of the National Center for Responsible Gaming (NCRG).”

Filling in more of the story, Fahrenkopf elaborated, “The opponents of gaming were saying that 40-50% of people who went into casinos were problem gamblers. They stated that these people couldn’t control themselves, they would lose all

their money, they would break up their families and turn to crime. Looking around at some other industries, such as tobacco, I knew that we couldn’t say that we either don’t know about or recognize any of the negatives that come with gaming. We had to study the issue for better or worse. We had to know the facts and figures of what problem gambling was. With the help of industry influencers like Bill Boyd from Boyd Gaming, Phil Satre of Harrah’s at the time, Terry Lanni of MGM and others, we created the National Center for Responsible Gaming. I have many accomplishments of which I’m proud, but this sticks out in my mind.”

It sounds like you had very strategic steps for progressing the interests of the industry. You made it legal, brought clarity to the problem gambling, what was next?

Fahrenkopf continued, “Building off our efforts to keep gaming legal as well as to start an independent entity to study and define problem gaming, the next challenge at the AGA was to develop respectability for the industry.”

We advanced casino trust and respectability starting with traveling all over the country to study the industry impact on communities. It was imperative

FRANK J. FAHRENKOPF JR. CONTINUED

that we confront the negative image a lot of people had towards gaming and we did that first with facts and data. Remember, this is on the heels of a lot of crime being allegedly associated with casinos. It wasn't easy, but like with so much else, I think we won with consistent effort across several fronts including:

- impact analysis studies showing the economic and social benefits to communities
- strategic industry and general public communications
- alignment with state regulators
- test lab and manufacturer engagement

Mr. Fahrenkopf, you were the driver or a key supporter of so many other developments and advancements in the industry: G2E, the Association of Gaming Equipment Manufacturers (AGEM), and Global Gaming Business magazine to mention a few. Where do you see the AGA being relevant in the future?

Fahrenkopf, "I'm proud to say that I played a part in legitimizing, normalizing and bringing respectability to the casino industry. What Geoff Freeman faced, and what future leaders of the AGA will face is going to focus on continuing to keep

pace with technology and new fronts in gaming. Think of sports betting, online betting and beyond. The AGA must also continue to set legislative agendas, educate, conduct studies, communicate and bring stakeholders from all sides of the industry: manufacturers, regulators, test labs, operators, legislators and others into the same room on matters."

Concluding our interview, Fahrenkopf stated,

"Let me close by saying that the future of the AGA will be as exciting, challenging and vital to the industry as my work was when I was CEO. I'm looking forward to seeing what's next, and I have great confidence and that Bill Miller is the right person to lead the AGA into the future."



GEOFF FREEMAN

AGA CEO FROM 2013-2018

How did you come to work with the AGA?

Freeman, "Prior to the AGA, I worked with the travel industry which brought me into contact with thousands of business interests. Their collective interest was simply, 'we want more people traveling'."

Freeman continued, "Post 9/11 we'd seen a massive decline in travel to the United States that had a disproportionate impact on Las Vegas. Then in early 2009, we saw some misguided language from the White House that dissuaded businesses that had received taxpayer assistance during the financial crisis from traveling. Again, this hit Las Vegas particularly hard as companies like Wells Fargo cancelled or reconfigured conferences and events."

Building from these challenges, Freeman filled in the picture, "Those two situations created opportunities for us to champion travel, as well as to direct important policy matters in a way that put us on the radar of leaders of the gaming industry. It was simply fortunate that they noted some of the good we'd done within the travel industry, from creating the Precheck program, to marketing travel to the United States, to effectively addressing President Obama's administration's concerns."

Speaking directly to the choice to have him lead the AGA, Freeman continued, "When the gaming industry started to look for a successor to Frank Fahrenkopf they decided to go in a vastly different direction. If they were looking for the next 'Frank', I wouldn't have been the right guy. I was fortunate they were looking, 17 years later, for a different style of leadership."

What key challenges did you face on your first day at the AGA?

"I think the number one obstacle was, how do you modernize and move forward with an organization that has achieved what it set out to achieve?"

Freeman elaborated, "Frank's primary responsibility was to prevent Washington from doing bad things to the gaming industry. Between Frank and Harry Reid, they succeeded. Washington was not doing bad things to the industry and Frank deserves tremendous credit for that leadership and that success."

Moving forward, Freeman continued, "My challenge was in how to modernize the organization because at that point our aspirations had moved beyond preventing bad things from happening. We wanted to make good things happen. That was number one."

GEOFF FREEMAN CONTINUED

“Number two, how do you take an organization that is so identified with Las Vegas and begin to evolve it so that it represents the totality of the industry? When I came in, the AGA was largely focused on, and composed of companies you’d find on the Las Vegas Strip.”

Freeman, “In today’s market, it’s more important than ever that you unify an industry and speak with one voice. We needed to diversify, we needed to represent the totality of the expanding industry. That was an exciting challenge.”

What sort of support did you have from the industry to address these challenges?

Freeman, “I received support from many stakeholders across the industry but must note Jim Murren of MGM as being one of the greatest visionaries and sources of support early on. To his great credit, he had a very particular vision for the association. Jim wanted an inclusive, contemporary association that was also extremely transparent in terms of actions and priorities. With his outspoken support, we

were able to bring the association further and faster than we otherwise could have.”

Any disappointments or missed opportunities that you think were missed during your time at the AGA?

After a thoughtful pause, Freeman said, “My proudest accomplishment goes hand-in-hand with my greatest disappointment leading the AGA.”

Freeman continued, “My proudest accomplishment is the industry finding ways to

work together to grow the business. Sports betting is obviously the premier example of that. This industry’s nature is not to be collaborative. It’s just the way the gaming industry is. The idea that, ‘a rising tide lifts all ships’ is NOT a mantra of the gaming industry. Beginning to build that collaboration between regulators, test labs, manufacturers, operators, and other parts of the industry was tremendously rewarding. I think the AGA helped the industry realize some of the potential of working together.”

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GEOFF FREEMAN CONTINUED

Freeman, "At the same time, one of my disappointments is that there remains a reflexive nature for people to go to their corners. We built up a capability but didn't develop a muscle for collaboration across the industry."

A lot of people looking at your accomplishments at the AGA would point to sports betting as your biggest win. Others point to the AGA expanding and becoming more inclusive. Where do you rank you these milestones of the AGA under your leadership?

Freeman on his own legacy, "I would say my biggest achievement isn't either of those. My biggest win was uniting the gaming industry. Sports betting is an outcome of uniting the industry. Not just the biggest operator interests but the regional operator interests, certainly the twelve biggest tribes as well as manufacturing interests. We were no longer a coalition of the willing. We were a true trade association that represents the totality of the gaming industry. That is my

proudest achievement at the AGA. From that unity comes sports betting. From that unity comes the ability to prevent the effort to decrease the slot tax threshold. From that unity comes the ability to protect resort fees. The unity resulted in those successes."

What would you say are some of the biggest challenges and opportunities you see for the AGA in the future?

Reflecting, Freeman added, "The major challenges and opportunities are one in the same across the AGA and the larger industry. The organization was established

to prevent bad policy in Washington. The AGA under Bill Miller's leadership will continue to ensure that is achieved. I have no doubt about that.

The challenge and opportunity are to go where the action is."

Freeman continued, "The action is less so in Washington and more so in the

states. When you look at the industry from a brick and mortar standpoint, it's largely tapped out in terms of expansion. There ARE limited opportunities, Texas for

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GEOFF FREEMAN CONTINUED

example, but this means that when you look for growth you have to be creative as to where you find that growth. I'm of the opinion that a lot of that growth is hidden in terms of inefficiencies in the current marketplace. It's hidden in terms of the cost of doing business. Growth is hidden in the burdens of regulation.

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In order to be successful, the AGA is going to have to unite the industry to pursue some common-sense policies at the state and tribal level. That's not an area where the AGA has been active in the past and it's not an area where everybody in the industry is sure they want to see the AGA active in the future. However, if the organization is about growth, then it needs to go where growth is, and that growth is removing friction from the marketplace."

Freeman in closing: "The AGA is a special organization. Frank created something that is unique and led it effectively for 17 years. I'm pleased to have had the opportunity to succeed him and put a small mark on the organization. It's an exciting and evolving industry. It was tremendously rewarding to be a part of the industry and this organization, and I'm confident that Bill is going to take the AGA to new heights. The only obstacle to the industry... is the industry. It's about where it sets its expectations. It's about where the industry sets its aspirations. I'm proud to say that during my time at the AGA we focused more on what united us, than where we had differences, and I think the industry is stronger for it."

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STACY PAPADOPOULOS

AGA CEO FROM 2018-2019

What was your first role at the AGA?

Papadopoulos, "I came to the American Gaming Association to serve as general counsel. Given my background and experience, my initial focus was to lay the legal ground work for the AGA to realize Geoff's vision for a modern and inclusive association by transforming the AGA from a Las Vegas-centric organization to one that better represents the industry as a whole. I did this by working with Geoff and our Board to create new membership and governance structures that enabled the AGA to evolve and move forward."

Did you have industry support in this AGA evolution?

Giving context, Papadopoulos continued, "We had a task force of industry leaders that worked closely with us on our membership and governance reform proposal. The task force included Tim Wilmott, Patti Hart and Mike Leven, who brought an interesting mix of talent and perspective to the table. Mike brought a broader hospitality perspective, Tim has brought strong industry experience and Patti brought a supplier and technology focus to the conversation."

What's been one of your biggest surprises being CEO of the AGA these last six months?

Pausing to reflect, Papadopoulos, "One of the biggest surprises to me throughout my time at AGA is the variety of challenges the industry faces. Some of these challenges are classic business obstacles, others are

IT'S A DIVERSIFIED,
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connected to the regulatory complexity of gaming--the patchwork of frameworks and requirements that you find both at a tribal and commercial level. It's a diversified, growing and interesting industry."

What do you tell people when they ask you why they should join the AGA?

Papadopoulos, "The AGA provides a seat at the table for those in our industry and those that want to work with and support the industry. We give different entities, from operators to manufacturers to test labs to regulators and other suppliers the opportunity to participate in conversations about current and future-

STACY PAPADOPOULOS CONTINUED

focused issues. Our ultimate goal is to drive consensus on industry priorities--to speak with one, strong voice that moves the industry forward.

What do you see as one of the biggest opportunities or challenges for the AGA going forward?

ONE OF OUR FUNDAMENTAL BELIEFS AT THE AGA IS THAT, 'PERCEPTION DRIVES POLICY.'

"In addition to our core advocacy efforts, I'm focused on growing member benefits. One of our current focuses is launching a new education program called, 'AGA Elevate.'"

Can you give more insight into the AGA's Elevate and other educational programs?

Papadopoulos elaborated, "We're always looking for ways to extend member benefits beyond advocacy, lobbying and having a seat at the table. When a prospective member looks at what we do, we want to be able to present them with real, tangible benefits. Actionable learning for the industry is just one part of that equation.

"In 2019 we'll be launching a members-only portal to share research and data that we've accumulated over years of study, analysis and surveys. It will also be a place for members to see recorded Elevate sessions. It's all about delivering member value."

"One of our fundamental beliefs at the AGA is that, 'perception drives policy.' That's why we're constantly focused on expanding and evolving our 'Get To Know Gaming' (G2KG) campaign, which showcases the economic benefits of the industry to employees, communities and consumers. An enormous challenge for the AGA and the industry is addressing and breaking the misperceptions that people have about gaming as it expands across the U.S.

"What the AGA has always done and will continue to do is to get in front of myths and misperceptions of the gaming industry. We'll need to stay proactive about both opportunities and risks. The AGA will need to continue to address both, or they'll be addressed for us."



BILL MILLER

AGA CEO FROM 2019-

Speaking with Bill Miller, incoming CEO of the American Gaming Association, he reflected on the history of the AGA and looked forward into how the organization will remain relevant to the industry in the immediate future and beyond.

“The AGA has an incredible record addressing the issues that impact members the most, providing value through research, events and education, as well as advancing the casino gaming industry’s legislative agenda. Beginning with Frank Fahrenkopf to Geoff Freeman and continuing through Stacy Papadopoulos, the American Gaming Association has transformed gaming from an activity that was almost outlawed, to accepted as legitimate mainstream entertainment.”

Miller continued, “Going forward, the AGA is going to play a vital role on an assortment of issues relevant to our membership including sports betting as well as new technologies that will continue to push the boundaries of gaming. I’m honored to join the team and help lead the industry into this next era.”



BMM Testlabs is very pleased to be in its second year of partnership with the AGA. This partnership is focused primarily on educational initiatives including whitepapers, events and interviews to provide timely and relevant insight to the gaming industry.

BMM Testlabs is the longest established and most experienced private independent gaming testing laboratory in the world.

We have been serving the gaming industry for over 37 years. Our experience, expertise and dedication in this fast paced and evolving market ensures we always exceed client expectations.

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