

THE FLORIDA SENATE

COMMITTEE ON GAMING

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MEMORANDUM

To: Gaming Committee Members
CC: All Senators
From: Senator Garrett Richter, Chair
Subject: House and Senate jointly invite proposals for a comprehensive gaming study
Date: February 20, 2013

The Florida Senate and House of Representatives today announced a joint invitation for written replies from qualified vendors to perform a two-part study detailing gaming market information. The study will be used by the Florida Legislature to better understand the economic, fiscal, and social impacts of possible changes in Florida's gaming environment. The "Invitation to Negotiate" is published at <http://www.leg.state.fl.us/ITN859>.

Gaming is a well-established business sector in Florida. Its roots stretch back to the 1890s. Pari-mutuel racing has been state-regulated since 1931. In the past 25 years, gaming industries have been transformed, not just in Florida but all around the country. Pari-mutuel wagering has declined. The State Lottery, as well as cruises, card rooms, casinos, and "Internet cafes" have emerged. Meanwhile, the State's approach to regulating and taxing gaming activities has not kept pace. Layers of exceptions and patches are not working well to promote the state's overall economic and social welfare.

The situation demands a comprehensive critical assessment, which is the task President Gaetz and Speaker Weatherford set for the Senate and House gaming committees. The study, which will be complete by October 1, 2013, will set a factual foundation for our deliberations.

The study will analyze not only what we have but also new possibilities knocking at the door. It will inform our choice of whether or not to open the door, and if so, how wide. The study will:

- Evaluate the structure and performance of Florida's existing gaming industry, including identification of subsectors, their size, and their economic importance;
- Describe the economic and fiscal impacts of each subsector, assess changes in those impacts over time until the present day, and include projections for the future.

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- Consider likely social costs of expanded casino gaming activities, including problem and pathological gambling-related behaviors and changes in crime rates.
- Include estimates of total spending and net (recognizing reduced spending at other Florida businesses because visitor and resident spending has now flowed to gaming) economic impact for gaming as well as the change in demand associated with Floridians, visitors.

For more information about the Senate Gaming Committee, see the committee's [webpage](#).