Impact of Riverboat Gambling on the Business Climate in Lake County, Indiana

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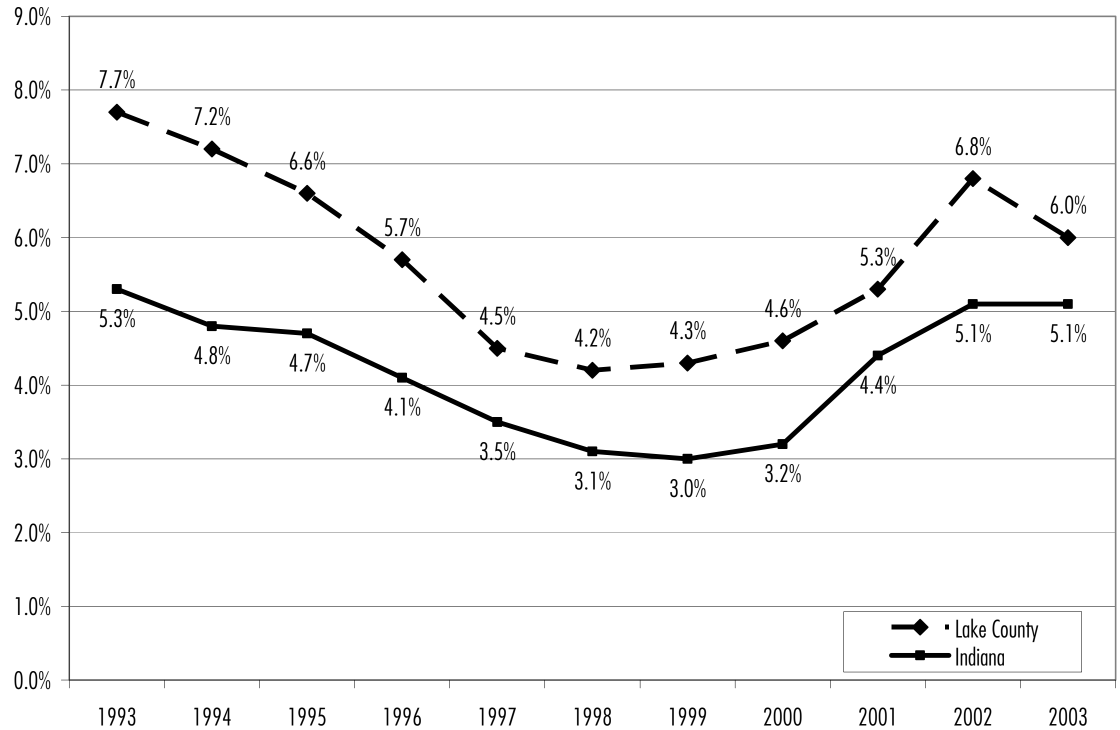
Advocates of legalizing Indiana riverboats argued that riverboats would contribute to local economies of stressed areas through newly created job opportunities and promises for increased wages. Advocates also contended that private local business establishments would benefit through increased consumption of goods and services from the influx of casino patrons and employees. Others argued that riverboats would have detrimental effects through cannibalization of existing business establishments. That is, opponents argued that riverboats with attached hotels and restaurants would provide a substitute for local consumption within local riverboat communities. As riverboats provide relatively higher paying jobs, some existing local establishments may not be able to compete for labor.

A study released by the Indiana Gambling Impact Study Commission in 1999 found that all Indiana riverboat counties were suffering from lower than normal economic conditions prior to riverboats beginning operations. Following the introduction of riverboats in these counties, the overall employment, wages, and number of firms generally were higher or comparable to statewide trends. Lake County is unique among the Indiana riverboat counties. It is the only county that has more than one riverboat license. Lake County has four licenses: One in East Chicago; two in Gary; and one in Hammond. As Figure 1 illustrates, the unemployment rate in Lake County was consistently higher than the statewide trend. Each of the communities in Lake County with a riverboat had significantly higher minority populations, higher percent of poverty and unemployment, and lower rates of high school and college graduation.

This analysis expands upon the 1999 Indiana Gambling Impact Study Commission report, focusing on county level employment, wage, and number of establishments by industry using a special aggregation of ES-202 data provided by the Indiana Business Research Center.[1]

[1] The ES-202 program produces a comprehensive tabulation of employment and wage information for workers covered by state unemployment insurance laws. Publicly available files include data on the number of establishments, monthly employment, and quarterly wages, by industry, at the three-digit level North American Industry Classification System, by county, by ownership sector, for the entire United States.

Figure 1: Unemployment Rates for Lake County and Indiana 1993-2003



This paper identifies industries that have experienced observable changes soon after the commencement of gaming in Lake County. It also shows the total change in employment, number of establishments, and wage change near the riverboat. It is a descriptive analysis focused on industry change before and after the commencement of gaming operations. It does not attempt to provide a causal relationship between the establishment of riverboats and the change in other industries operating in Lake County. In fact, there is evidence that some change is simply a result of changes in industry mix.

Data Used for Industry Analysis

The United States Bureau of Labor Statistics (BLS) divides the employment and earnings into industries. Since 2000, the North American Industry Classification System (NAICS) has been the coding structure. The NAICS coding structure allows for hierarchical aggregation based on a six-digit system. All industries can be aggregated to the sector level (two-digit level). There are 21 sectors for which industries are assigned. These sectors can be grouped further into two production categories: Goods Producing and Service Producing. While the coding system allows for six-digit desegregation, the three-digit industry level is the most detailed level of analysis that will be performed in this report. That is the level just below the sector aggregation. For the purposes of this report, the three-digit level will be referred to as the industry level. The data used for this report in years prior to 2001 are a special tabulation provided by the Indiana Business Research Center. These data were recoded from the former Standard Industrial Classification (SIC) coding scheme used during those years.

Changes in Total Jobs, Establishments, and Wages

Figures 2, 3, and 4 compare trends in total number of jobs, total number of establishments, and average wage per employee between Lake County and the aggregate of non-riverboat counties for the 13-year period beginning in 1991 and ending in 2003. These data reflect third quarter figures. The trend lines take 1991 as the base year and compare each of the following years to those levels. Thus, 1991 as the base year is set to 100, and the subsequent years can be read as annual percentage changes from the base year, much like the consumer price index. The focus of the analysis is on whether or not there are observable changes that occurred after gaming commenced in Lake County and whether or not those changes are divergent from trends during the same time period in the aggregate of non-riverboat counties.

As shown in Figure 2, growth in total number of jobs in Lake County lagged the growth in non-riverboat counties. In the mid-nineties, the number of jobs increased but ultimately fell to nearly the same level in 2003 as in 1991. At the same time, the total number of jobs in the aggregate of non-riverboat counties was approximately 14 percent higher in 2003 than it was in 1991. The difference between job changes in Lake County and the aggregate of non-riverboat counties began well before gaming in the area.

Figure 2: Comparison of Trends in Total Jobs

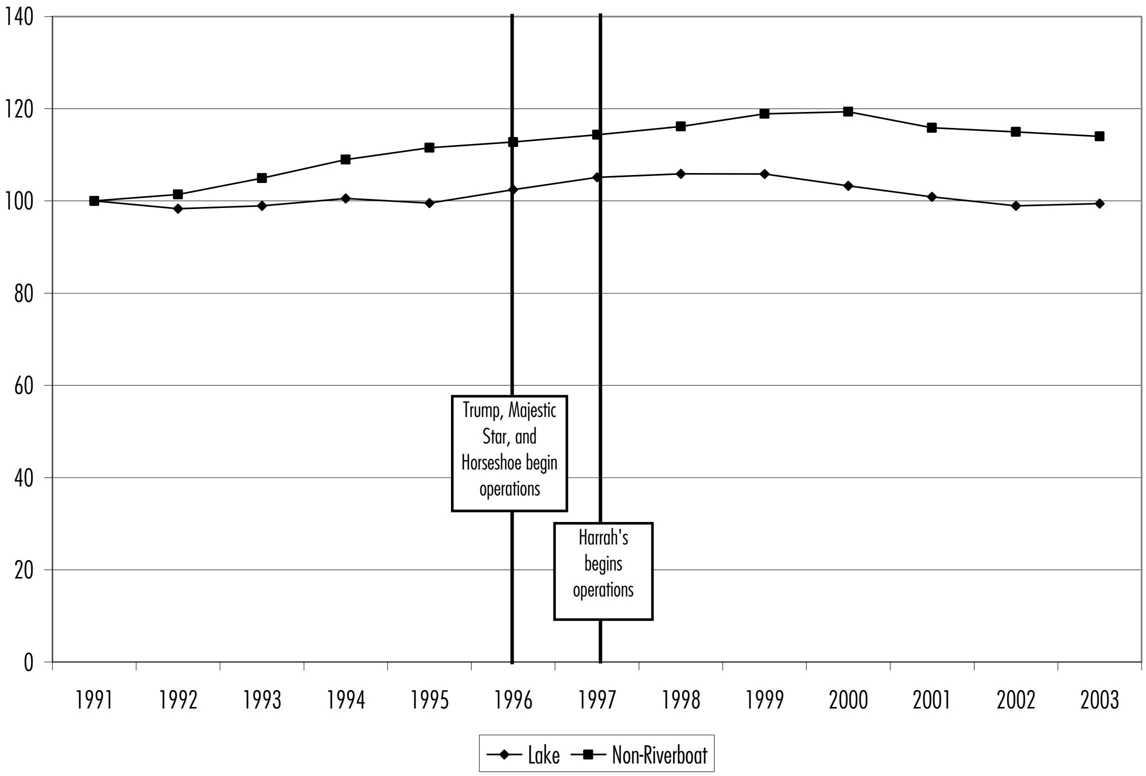
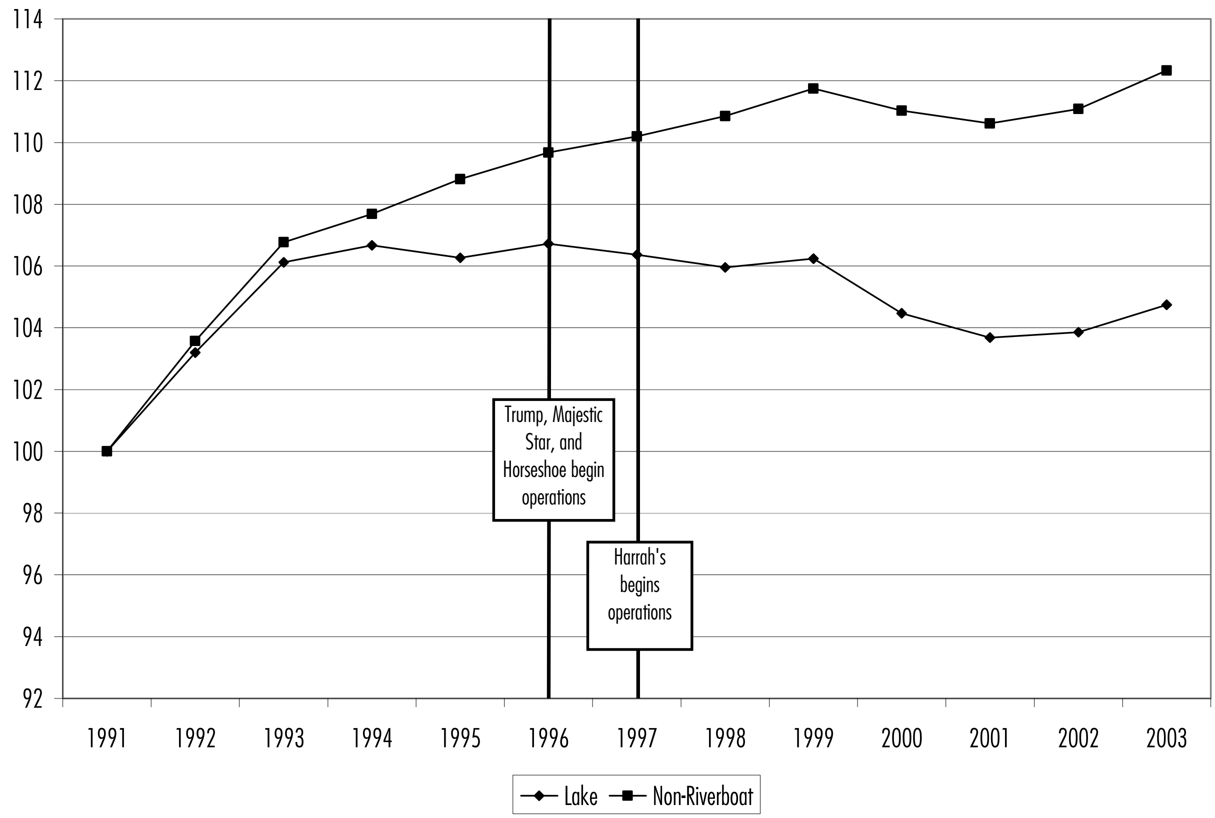


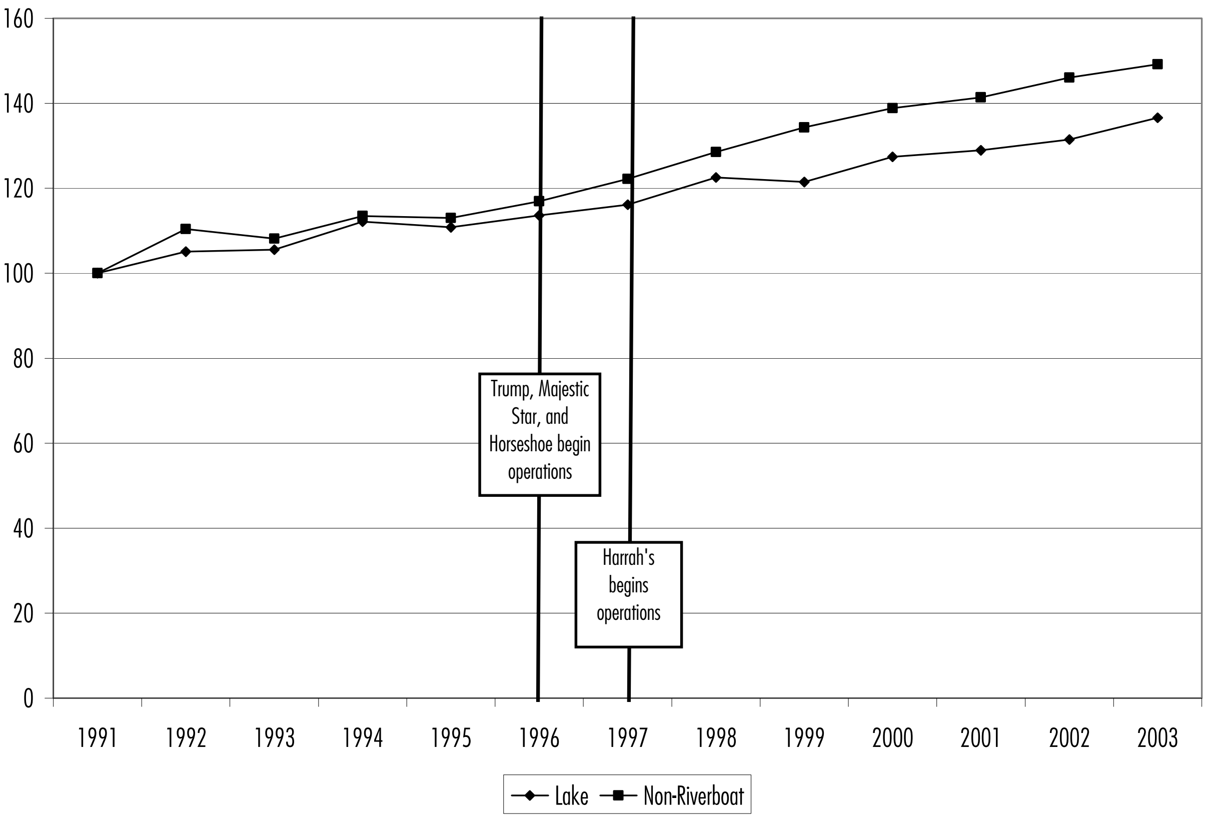
Figure 3 shows that the total number of establishments in Lake County was 5 percent greater in 2003 than in 1991. However, that number is less than half of the 12 percent increase in the number of establishments reported in the aggregate of non-riverboat counties over the same time period. The divergence of the Lake County trend from the aggregate non-riverboat county trend began in 1994, two years prior to the opening of the first riverboats in the area.

Figure 3: Comparison of Trends in Total Number of Establishments



While the average wage increased fairly consistently each year in Lake County during the 13-year period, Figure 4 indicates that it began slowing relative to the aggregate of non-riverboat counties around 1996. Even though the slower growth in wages began during the same year as riverboat gaming began, it does not prove causality. It is possible that the slowed job growth and loss in the number of establishments that began early during the study period reflects a relatively less than optimal business climate that began prior to the commencement of gaming. The average wage trend also likely reflects the change in industry mix in the area.

Figure 4: Comparison of Trends in Average Wage



Changing Industry Mix

The industrial mix in employment has changed dramatically over the past few decades. Across the country, the composition of employment has shifted from goods producing industries to service industries. This is also true in Indiana.

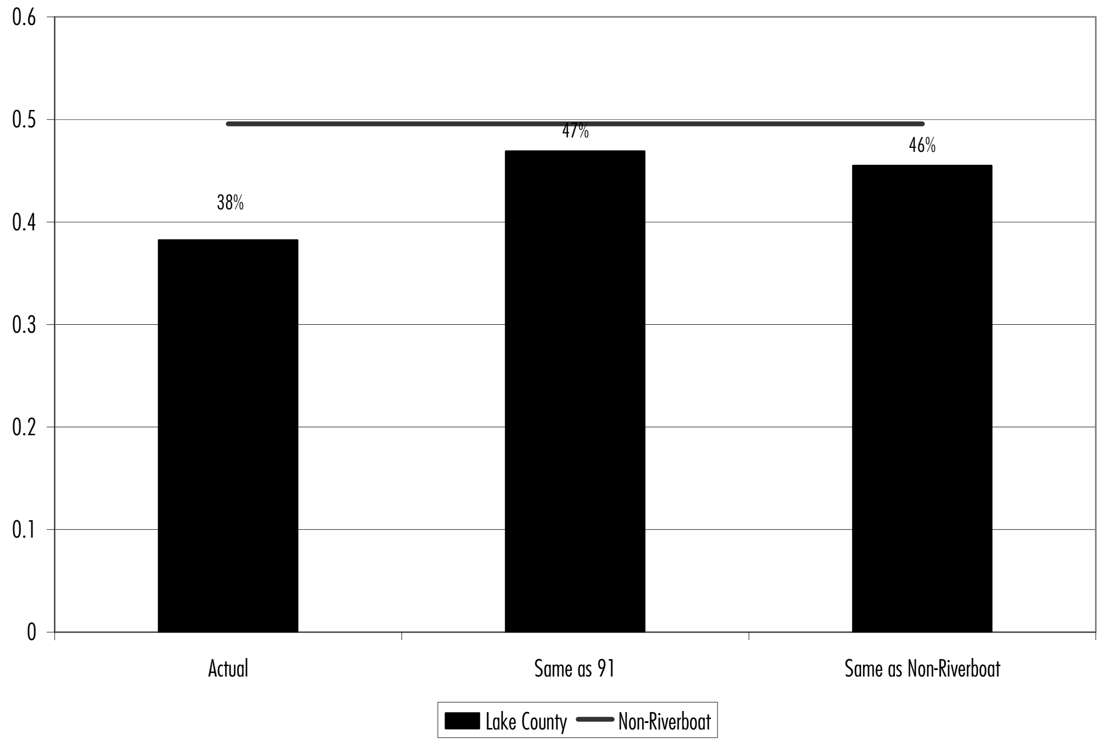
Table 1 compares the proportional shift in employment in Lake County to the aggregate of non-riverboat counties for the 13-year period beginning in 1991 (five years before riverboat gaming began in Lake County) through 2003. Like the aggregate of non-riverboat counties, Lake County has experienced a shift from manufacturing to service sector employment. However, that shift was 5 percent greater in Lake County. The greatest negative shift occurred in the Manufacturing Sector of the Goods Producing category. The Health Care and Social Services and the Arts, Entertainment, and Recreation sectors shifted positively in the industry mix. Additional negative shifts occurred in the Finance and Insurance and Transportation and Warehousing sectors. These industry shifts have contributed to the changing wage trends.

Table 1: Proportional Shift in Employment in Lake County by Sector

	Proportion in 2003		Proportional Shift from 1991 to 2003	
	Lake	Non-Riverboat	Lake	Non-Riverboat
Goods Producing	22%	28%	-8%	-3%
Construction	7%	5%	-1%	1%
Manufacturing	15%	22%	-7%	-4%
Agriculture, Forestry, Fishing, and Hunting	0%	0%	0%	0%
Mining	0%	0%	0%	0%
Service Producing	78%	72%	8%	3%
Health Care and Social Services	14%	12%	3%	2%
Educational Services	7%	6%	1%	1%
Real Estate and Rental and Leasing	1%	1%	0%	0%
Finance and Insurance	3%	4%	-2%	0%
Information	1%	2%	0%	0%
Arts, Entertainment, and Recreation	4%	1%	4%	0%
Accommodation and Food Services	8%	8%	0%	1%
Other Services (Except Public Administration)	4%	3%	0%	0%
Administrative and Support and Waste Management and Remediation Services	5%	5%	1%	1%
Professional, Scientific, and Technical Services	3%	3%	0%	0%
Management of Companies and Enterprises	1%	1%	0%	0%
Public Administration	6%	5%	1%	0%
Utilities	1%	0%	1%	0%
Retail Trade	13%	12%	0%	-1%
Wholesale Trade	3%	4%	-1%	0%
Transportation and Warehousing	4%	4%	-2%	0%
Unallocated	0%	0%	0%	0%

Figure 5 shows comparisons of actual change in wages during the 13-year period relative to the actual aggregate of non-riverboat counties and two other scenarios. Scenario 1 shows the wage increase that would have occurred if there had not been a change in industry mix since 1991. Scenario 2 indicates the increase in wages that would have occurred if the industry mix was the same in Lake County as in the non-riverboat counties in 2003. As shown, if the industry mix had remained the same in Lake County as in 1991, the average wage would have increased by 47 percent rather than the actual 38 percent. That scenario also would have increased faster than the expected wage increase if the 2003 industry mix of Lake County was the same as the aggregate of non-riverboat counties. Due to the wage structure of the Lake County's economy, none of the scenarios would have provided an increase equal to the aggregate of non-riverboat counties.

Figure 5: Actual and Scenario-Based Wage Change Comparisons, 1991-2003



Inter-Industry Business Climate Change

This section of the analysis provides a perspective of the business climate at the major industry level. This perspective offers insight into whether or not specific industries within previously outlined sectors have experienced substantial changes in number of jobs, number of establishments, and average wage per job after the commencement of gaming.

While more insightful, analyzing the data at the industry level is also much more complex. Most of the complexity exists because of data suppression. The ES202 data are suppressed if an industry has less than three firms or if one firm accounts for over 80 percent of industry employment. Data are suppressed to protect the privacy of individual firms. Even when all data are disclosed, some industries are too small and volatile to recognize any consistent trends. As a result of these complexities, specific industries had to meet two criteria before being included in the analysis.

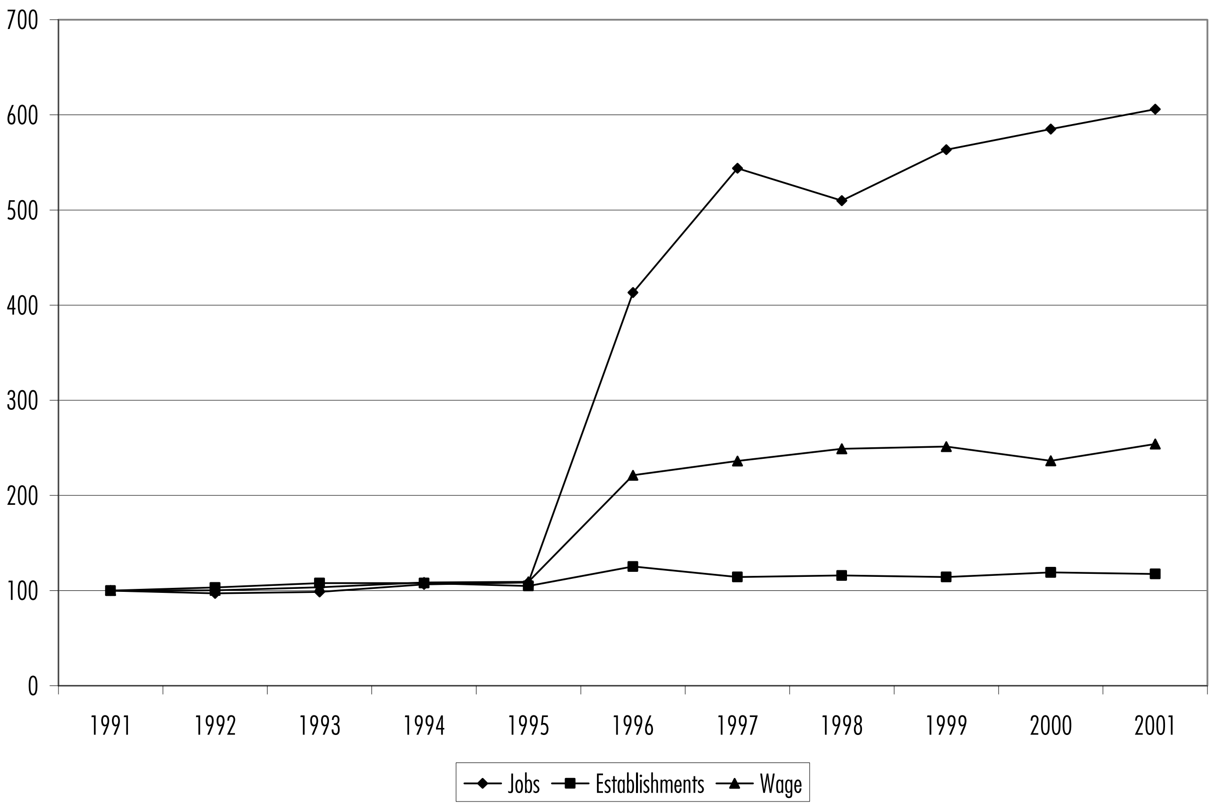
- Criterion 1: Data for specific industries had to be disclosed in at least two of the years between 1996 and 2001. To be included in the aggregate of non-riverboat county comparison, a specific industry within a given county had to be disclosed for every year between 1991 and 2001.
- Criterion 2: In addition to criterion 1, the number of jobs or establishments within specific industries had to account for at least 0.5 percent of the total for the county in at least one of the years between 1991 and 2001.

After meeting these criteria, the analysis began with a comparison of change in industry employment from 1991 to 1996 (before the riverboat), 1996 to 2001 (change after gaming). Based on the change during these time periods, a comparability index was constructed. The comparability index is equal to the percentage change in employment in Lake County from one time period to the next time period minus the percentage change during the same time periods in the non-riverboat counties. This index measures whether or not an industry in Lake County experienced comparable employment trends following the operation of gaming in Lake County. If an industry had an index score less than -5 or greater than 5 between 1996 and 2001, it was examined further. Further examination of those industries focused on whether or not each showed observable change before and after 1996. Again, the focus of this analysis is on trends that show observable divergence from the aggregate non-riverboat comparison before and after the commencement of gaming activities. It is not a study of causal relationships of riverboat gaming.

Amusement, Gambling, and Recreation Industry

The Amusement, Gambling, and Recreation Industry was one of the industries that experienced considerable change in Lake County in 1996.[2] It deserves special attention because it is the industry in which the riverboat operations are assigned. Much of the change in this industry is certainly due to the addition of the riverboats in the county. As Figure 6 indicates, there was a very large increase in employment while the number of establishments did not fluctuate as much. Wages also increased fairly drastically in 1996, the first year of riverboat gaming in Lake County.

Figure 6: Lake County Trends in Amusement, Gambling, and Recreation Industry (1991-2001)



Other Industries in Lake County Experiencing Considerable Change

Eighteen other industries were found to have observable changes in 1996 that were not comparable to trends in the aggregate of non-riverboat counties.[3] Table 4 identifies those industries. It also indicates the sector in which each industry is categorized and the absolute change in employment, number of establishments, and average wage from 1996 to 2001. Most of the industries that experienced divergent trends were within the manufacturing sector (seven industries). All of those industries experienced a negative change in employment and only two of those industries did not lose establishments. The Food Service and Drinking Places, Food and Beverage Stores, Wholesale Electronic Markets and Agents and Brokers, and Motor Vehicle and Parts Dealers also lost employment and establishments. The Nonstore Retailer industry was the only industry in which the wage was lower in 2001 than in 1996. Selected industries in which employment grew relatively more quickly after 1996 include, Nursing and Residential

[2] The trend lines take 1991 as the base year and compare each of the following years to those levels. Thus, 1991 as the base year is set to 100, and the subsequent years can be read as annual percentage changes from the base year, much like the consumer price index.

[3] See Appendix I for description of each industry

Care Facilities; General Merchandise Stores; and Executive, Legislative, and other General Government Support.

Table 4: Identified Industries and Summary of Changes

Industry	Employment Change 1996-2001	Establishment Change 1996-2001	Wage Change 1996-2001	
			Weekly Average	Annual Average
Manufacturing Sector				
Transportation Equipment Manufacturing	-709	-2	$187	$9,724
Machinery Manufacturing	-537	2	$86	$4,472
Food Manufacturing	-365	-5	$217	$11,284
Chemical Manufacturing	-344	-1	$151	$7,852
Nonmetallic Mineral Product Manufacturing	-52	2	$113	$5,876
Printing and Related Support Activities	-45	-2	$155	$8,060
Paper Manufacturing	-13	-1	$181	$9,412
Wholesale Trade Sector				
Wholesale Electronic Markets and Agents and Brokers	-298	-32	$145	$7,540
Retail Trade Sector				
Food and Beverage Stores	-521	-18	$29	$1,508
Motor Vehicle and Parts Dealers	-313	-15	$146	$7,592
Nonstore Retailers	8	-10	-$156	-$8,112
Health and Personal Care Stores	59	-8	$54	$2,808
General Merchandise Stores	755	0	$55	$2,860
Health Care and Social Assistance Sector				
Hospitals	59	-1	$117	$6,084
Nursing and Residential Care Facilities	437	3	$60	$3,120

Table 14: Identified Industries and Summary of Changes (continued)

Industry	Employment Change 1996-2001	Establishment Change 1996-2001	Wage Change 1996-2001	
			Weekly Average	Annual Average
Accommodation and Food Services				
Food Services and Drinking Places	-941	-53	$37	$1,924
Accommodation	7	6	$86	$4,472
Public Administration				
Executive, Legislative, and Other General Government Support	1,440	6	$108	$5,616

Table 5 indicates the changes in employment in more detail for the selected industries. The first column after the industry name shows the actual employment in 2001. The next two columns show what employment in 2001 would be for each of the industries if: (1) each industry followed the same trend after 1996 as experienced from 1991 to 1996 and (2) each industry followed the same trend between 1996 and 2001 as did the aggregate of non-riverboat counties. The last two columns show the difference between the actual employment and the employment under the other scenarios, respectively. If the numbers in the last two columns are positive, then Lake County is better off than it would be under either of the other scenarios. If the same numbers are negative, then that industry is worse off.

Table 5: Actual Employment in Lake County 2001 Relative to Other Trends

		Total Employment if Change in Employment Was Equal to:		Difference between Actual and:	
Industry	Actual	Average 1991-1996 Trend in Lake County	Trend in Aggregate Non-Riverboat Counties 1996-2001	1991-1996 Trend	Non-Riverboat Trend
Hospitals	11,111	12,357	12,350	-1,246	-1,239
Food Services and Drinking Places	13,671	15,903	14,902	-2,232	-1,231
Transportation Equipment Manufacturing	1,011	2,770	1,612	-1,759	-601
Machinery Manufacturing	8,79	2,025	1,284	-1,146	-405
Food Manufacturing	1,242	1,611	1,496	-369	-254
Nonmetallic Mineral Product Manufacturing	1,097	1,320	1,208	-223	-111
Chemical Manufacturing	1,352	1,560	1,445	-208	-93
Health and Personal Care Stores	1,932	1,778	2,020	154	-88
Motor Vehicle and Parts Dealers	3,164	4,398	3,241	-1,234	-77
Wholesale Electronic Markets and Agents and Brokers	486	829	520	-343	-34
Printing and Related Support Activities	402	526	402	-124	0
Accommodation	1,275	1,553	1,264	-278	11
Paper Manufacturing	286	84	245	202	41
Nonstore Retailers	510	361	413	149	97
Food and Beverage Stores	5,006	5,323	4,837	-317	169
General Merchandise Stores	4,858	4,348	4,417	510	441
Nursing and Residential Care Facilities	4,328	5,768	3,736	-1,440	592
Executive, Legislative, and Other General Government Support	9,070	7,309	8,281	1,761	789

As shown, Hospitals and Food Services and Drinking Places were the largest employers of the identified industries in 2001. Using the non-riverboat trend as the comparison, those industries also experienced the largest absolute difference between actual employment and what employment would have been under the other two scenarios. If the Hospital industry had grown at the same rate between 1996 and 2001 as it did between 1991 and 1996 (12,357 jobs), it would have kept pace with the trends experienced in the aggregate of non-riverboat counties (12,350 jobs).

Three of the selected industries that performed worse than if trends had been the same as from 1991 to 1996 in Lake County, still performed better than the aggregate of non-riverboat counties. Those industries include: Accommodation; Food and Beverage Stores; and Nursing and Residential Care Facilities.

Four industries performed better than under either scenario. One of those industries was government support, technically coded as Executive, Legislative, and Other General Government Support. The other industries include, Paper Manufacturing; Nonstore Retail; and General Merchandise Stores.

Table 6 compares the number of establishments for the selected industries. Twelve of the 18 selected industries had fewer firms in 2001 than if change had occurred at the same pace as between 1991 and 1996. Nine industries had fewer establishments than if they had changed at the same rate as the aggregate of non-riverboat communities. The Food Services and Drinking Places industry faired the worst relative to the other two scenarios. Other industries that slowed relative to both other scenarios include: Motor Vehicle and Parts Dealers; Health and Personal Care Stores; Wholesale Electronic Markets and Agents and Brokers; General Merchandise Stores; Nonstore Retailers; Transportation Equipment Manufacturing; Paper Manufacturing; and Hospitals. The industries that have more establishments than if they had performed like the aggregate of non-riverboat counties include: Chemical Manufacturing; Machinery Manufacturing; Accommodation; Nursing and Residential Care Facilities; Printing and Related Support Activities; Executive, Legislative, and other General Government Support; and Food and Beverage Stores.

Table 6: Actual Number of Establishments in Lake County 2001 Relative to Other Trends

		Total Employment if Change in Employment Was Equal to:		Difference between Actual and:	
Industry	Actual	Average 1991-1996 Trend in Lake County	Trend in Aggregate Non-Riverboat Counties 1996-2001	1991-1996 Trend	Non-Riverboat trend
Food Services and Drinking Places	743	935	788	-192	-45
Motor Vehicle and Parts Dealers	176	192	187	-16	-11
Health and Personal Care Stores	115	122	122	-7	-7
Wholesale Electronic Markets and Agents and Brokers	86	118	92	-32	-6
General Merchandise Stores	55	57	59	-2	-4
Nonstore Retailers	30	33	33	-3	-3
Transportation Equipment Manufacturing	9	10	10	-1	-1
Paper Manufacturing	5	6	6	-1	-1
Hospitals	9	11	10	-2	-1
Food Manufacturing	26	25	26	1	0
Nonmetallic Mineral Product Manufacturing	36	30	36	6	0
Chemical Manufacturing	23	27	22	-4	1
Machinery Manufacturing	41	41	38	0	3
Accommodation	38	29	35	9	3
Nursing and Residential Care Facilities	58	86	54	-28	4
Printing and Related Support Activities	41	41	37	0	4
Executive, Legislative, and Other General Government Support	37	28	31	9	6
Food and Beverage Stores	205	227	197	-22	8

Table 7 compares the average wage per job for the selected industries. The Nonstore Retailers; Nursing and Residential Care Facilities; Food and Beverage Stores; Nonmetallic Mineral Product Manufacturing; Machinery Manufacturing; Health and Personal Care Stores; Accommodation; and Chemical Manufacturing were the only identified industries that paid less on average than if the growth in wage per job had continued at the same rate as between 1991 and 1996. Seven of the 19 industries did not keep pace with wages of the aggregate of non-riverboat counties.

Table 7: Actual Wage in Lake County 2001 Relative to Other Trends

		Total Employment if Change in Employment Was Equal to:		Difference between Actual and:	
Industry	Actual	Average 1991-1996 Trend in Lake County	Trend in Aggregate Non-Riverboat Counties 1996-2001	1991-1996 Trend	Non-Riverboat trend
Nonstore Retailers	$30,732	$67,324	$51,148	$(36,592)	$(20,416)
Hospitals	$34,164	$34,075	$36,537	$89	$(2,373)
Nursing and Residential Care Facilities	$19,188	$19,547	$21,186	$(359)	$(1,998)
Food and Beverage Stores	$15,288	$16,751	$16,349	$(1,463)	$(1,061)
Nonmetallic Mineral Product Manufacturing	$39,156	$39,443	$40,005	$(287)	$(849)
General Merchandise Stores	$15,236	$13,208	$15,653	$2,028	$(417)
Machinery Manufacturing	$36,816	$41,395	$36,998	$(4,579)	$(182)
Food Services and Drinking Places	$9,932	$9,414	$9,514	$518	$418
Executive, Legislative, and Other General Government Support	$26,728	$26,212	$26,116	$516	$612
Health and Personal Care Stores	$23,920	$27,650	$23,301	$(3,730)	$619
Motor Vehicle and Parts Dealers	$34,528	$29,814	$33,292	$4,714	$1,236
Accommodation	$16,900	$18,564	$15,289	$(1,664)	$1,611
Chemical Manufacturing	$61,776	$63,400	$59,585	$(1,624)	$2,191
Wholesale Electronic Markets and Agents and Brokers	$45,760	$45,309	$43,165	$451	$2,595
Printing and Related Support Activities	$30,472	$25,897	$26,627	$4,575	$3,845
Transportation Equipment Manufacturing	$39,000	$35,446	$33,950	$3,554	$5,050
Paper Manufacturing	$43,680	$43,014	$38,440	$666	$5,240
Food Manufacturing	$38,688	$32,454	$31,640	$6,234	$7,048

Three of the industries in which the average wage was less than it would have been if it had experienced the same growth between 1996 and 2001 as occurred during 1991 through 1996, still performed better than if they had mirrored the aggregate non-riverboat county wage growth. Those industries included: Health and Personal Care Stores; Accommodation; and Chemical Manufacturing. Eight industries experience greater actual average wage increases than if they had experienced the same change under either of the other scenarios. Those industries include: Food Services and Drinking Places; Executive, Legislative, and Other General Government Support; Motor Vehicle and Parts Dealers; Wholesale Electronic Markets and Agents and Brokers; Printing and Related Support Activities; Transportation Equipment Manufacturing; Paper Manufacturing; and Food Manufacturing.

Summary of Business Impacts

Overall, the numbers of jobs, number of establishments, and average wage per job in Lake County have lagged compared to the trends in the aggregate of the non-riverboat counties. The lagged growth in jobs and establishments began well before the commencement of gaming. The divergence in wage growth relative to the aggregate of non-riverboat counties began approximately the same time as gaming in the county. However, this change is likely due more to the changing industry mix than the inducement of gaming employment in the area.

Amusement, Gambling, and Recreation Industry was one of the industries that showed considerable change after gaming began in Lake County in 1996. Obviously, the change is due to the addition of riverboats in the area. Employment and wages grew very rapidly in that industry post riverboat gaming.

Eighteen other industries met the criteria for analysis and showed considerable observable change in employment, number establishments, or wages near the time gaming commenced. Most of those industries were in the Manufacturing and Retail Sectors. It is impossible to argue that all of the observable changes documented here occurred because riverboats opened during that time period. Causal relationship between gaming commencement and other industry change is beyond the scope of this report. This study, however, provides an understanding of what the business climate is in a county that receives fairly large investments and much attention as a result of gaming in the community.

Table 9 provides a summary of change in selected industries, which exhibited considerable change around the same time as the commencement of gaming. Specifically, the table shows whether or not an industry had positive change after the commencement of gaming relative to the change in only Lake County five years prior (Lake), relative to only the aggregate of non-riverboat counties (non-riverboat), relative to both the change in the county five years prior and the change five years after in the non-riverboat counties (both), or positive change relative to neither of the two scenarios (neither). The bottom section of the table shows the count by employment, establishment, and wage. The table also scores each industry. The score is the sum of the three indicators based on the following conditions: Lake (1 point), Non-riverboat (1 point), Both (2 points), and Neither (-2 points).

Table 9: Summary of Relative Change by Selected Industries

Industry	Jobs	Establishments	Wage	Score
Nonmetallic Mineral Product Manufacturing	Neither	Lake	Neither	-3
Hospitals	Neither	Neither	Non-Riverboat	-3
Nonstore Retailers	Both	Neither	Neither	-2
Machinery Manufacturing	Neither	Both	Neither	-2
Food Services and Drinking Places	Neither	Neither	Both	-2
Motor Vehicle and Parts Dealers	Neither	Neither	Both	-2
Transportation Equipment Manufacturing	Neither	Neither	Both	-2
Wholesale Electronic Markets and Agents and Brokers	Neither	Neither	Both	-2
Health and Personal Care Stores	Lake	Neither	Non-Riverboat	0
Food and Beverage Stores	Lake	Non-Riverboat	Neither	0
Chemical Manufacturing	Neither	Non-Riverboat	Non-Riverboat	0
Nursing and Residential Care Facilities	Non-Riverboat	Lake	Neither	0
General Merchandise Stores	Both	Neither	Lake	1
Food Manufacturing	Neither	Lake	Both	1
Paper Manufacturing	Both	Neither	Both	2
Printing and Related Support Activities	Neither	Both	Both	2
Accommodation	Lake	Both	Non-Riverboat	4
Executive, Legislative, and Other General Government Support	Both	Both	Both	6
Both	4	4	8	
Lake	3	3	1	
Non-Riverboat	1	2	4	
Neither	10	9	5	

Most of the selected industries grew at a slower rate after the beginning of gaming operations and slower than the non-riverboat trend for the same time period (*Neither* in table above). Four industries performed better than both before gaming operations in the county began and the non-riverboat trend. Most of the industries' wages per job grew faster than they would have in the scenarios (trend in Lake County before gaming and trend of non-riverboat gaming).

The Executive, Legislative, and other General Government Support, within the Public Administration Sector, was the only industry to have increased faster than both of the other scenarios in employment, number of establishments, and wages. Others that placed positively on the positive growth score were General Merchandise Stores, Food Manufacturing, Paper Manufacturing, Printing and Related Support Activities, and Accommodation. Eight of the industries received negative placing under the scoring system. The industries that received negative competitive scores were Nonmetallic Mineral Product Manufacturing, Hospitals, Nonstore Retailers, Machinery Manufacturing, Food Services and Drinking Places, Motor Vehicle and Parts Dealers, Transportation Equipment Manufacturing, and Wholesale Electronic Markets and Agents and Brokers.rrent Financial