

The Groundwork of Casino Gaming in Taiwan

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Abstract

Casino gaming is often considered as an important source for the development of a tourism industry; it can generate instant revenues, tourists, and job opportunities. The purpose of this study is to determine the accurate direction of developing the casino gaming market in Taiwan. The six factors for developing casino gaming business are geography environment, accessibility, human resource, tourism resource, tourist market resource, and the social aspect. In accordance with the findings of this study, Matsu might not be an appropriate place to develop the casino gaming as a result of too many limits on geography environment, accessibility, human resource, tourist market resource, and social aspect.

Key Words: *Casino, Gaming, Taiwan*

1. Introduction

It is not necessarily the case to say that for those whom are most passionate about gambling are the Chinese and Southeast Asians (Hu, 1995). Casino gaming is often considered as a significant source for the development of a tourism industry (Israeli & Mehrez, 2000). In Asia, Macau surpassed Nevada in 2008 to become the world's largest casino gaming area; the success of Macau experience has inspired the interest of developing the gaming industry (Palenik, 2011). Besides Macau, there are legal casinos in South Korea and Malaysia (Kaur, 2004). Although, Singapore has strict laws, they have opened two mega casinos in 2010. Other Asia countries such as Japan, Vietnams, and Dubai also expressed their great interest to get involved the gaming business (Klaphake, 2012). Although the gambling activities are prohibited in Taiwan, a number of foreign gambling centers have set up offices in Taiwan to try to rope in the lavishness of Taiwanese tourists who enjoy gambling. It is estimated that there were 3.6 million Taiwanese visited casinos abroad, with 1.2 million of whom went to Macau and 500,000 to South Korea in 2012 (The China Post, 2013).

The Taiwanese government finally has passed a long-stalled bill in early 2009; it allowed the casinos to be developed as part of tourism facilities in the leisure resorts on offshore islands. In 2012, Matsu residents embraced casino gaming in a referendum, and wish to become a gaming haven for Chinese tourists. Nevertheless, the Mainland China government is opposed to it and has cited Chinese laws which outlaw gambling in Taiwan. China government has declared that it would not allow its people to go to Matsu to gamble, and announced they will limit China residents' visitations to Taiwan if Taiwan approves draft legislation on Matsu island casinos. Hence, Taiwanese politicians are considering setting up casinos in Taoyuan Aerotropolis. Due to lack of experience with establishing casinos, Taiwan government will seek

and involve international investors with this project. Several overseas casino operators have already expressed interest (Gaming Asia, 2013). London-listed British gaming company Amazing Holdings plc. has expressed interest to open the first casino and to build the world's largest casino in Taiwan as rivals Wynn Resorts Ltd. and Las Vegas Sands Corp. expanded in Macau (Culpan, 2007). It has already purchased a large beachfront land to build casinos (Wang, 2009). In addition, the world's top two largest casino firms, Harrah's Entertainment Inc. and MGM Resorts International, had hoped to use Taiwan to enter Asian gaming market. Furthermore, two of the Las Vegas-based industry magnates, Las Vegas Sands and Caesars Entertainment, and the other two Macau gaming developer, Galaxy Entertainment Group and Melco Crown Entertainment, has also had interest in Taiwan (Jennings, 2009 ; Gaming Asia, 2013).

The concept of building casino gaming in Taiwan has been a controversial topic for many decades. The opponents have focused on issues of basic morality, public order, and safety (Her, 2001); in addition, in the fear of the "Cannibalization" phenomenon that will impact the local economy. However, there are research findings that casinos do not take away local business and they do create jobs. Furthermore, there is evidence indicating that casino gaming has a positive influence on tourism (Kotler, P., Bowen, J., & Makens, J., 2010). While there are some opposition legislators as well as the anti-gambling campaigners against casinos set-up in Taiwan, there are still numerous people who never give up and continue to fight for casino legalization. Taiwan also can derive experiences naturally from the U.S. in gaming development if Taiwan inherits the development model from the U.S. magnate investor groups (Lee, 2011).

There are very few related studies discussing site factors of casinos. Hence, this research explores the key requirements of successful casinos, and the investigation is on the premise that casino gaming is legalized. That is, the legislation issue is not considered.

2. Literature Review

2.1 Casino Gaming Development

The gaming industry, whether in the United States, or elsewhere, has seen tremendous growth and become a mainstream industry in the past two decades (Tsai, Cheung, & Lo, 2009). Casino gaming, by its general definition, means "any recreational resource with gambling". Long (1995) specified gaming industry as "a legal, legitimate, and highly regulated industry". American Gaming Association defined the word "gaming" as "the action or habit of playing at games of chance for stakes" (AGA, 2013).

Tsaur, Kuo, & Lo (2000) generated five criteria with seventeen possible evaluation conditions of the key locational factors of establishing casinos which are divided into supply conditions and the restricted conditions. The five major criteria included tourism resource, infrastructure and superstructure, social and economic aspects, geography, and accessibility.

In the conceptual stages of casino development, it should focus on three major issues: scale of the industry, competition for gaming dollars and who should benefit. Despite the economic gains derived, it has not been easy for local residents. For example, after approval for limited stakes gaming in Central City and Black Hawk of Colorado, there are no grocery stores or gas stations in town (Long, 1995). It has been classified to “The Cannibalization”. We also can not ignore this kind of phenomenon.

McCartney (2005) pointed out “While the presence most of casinos brings well-pronounced and apparent economic benefits, there is also a need to remain aware of the social and environmental impacts of such developments, which will ultimately influence resident attitudes”. Some of the policy issues most frequently discussed in the social and cultural arena center around the prevention and solution of problem gambling, crime rate, bankruptcy, divorce, and destruction of cultural resources (Chang, 2002). Long (1996) stated that to build long-term success it will be important to monitor a community’s ability to handle issues, to focus on the health and integrity of the gambling industry and the value of the experience to the visitors (as cited in McCartney, 2005, p.46).

2.2 The Overview of Taiwan Gaming Industry History

It is unquestionable that those who are most passionate about gambling are Chinese and Southeast Asians (Hu, 1995). In fact, Asians spend almost twice as much as Americans do on gaming as a percentage of disposable income (Norton, 2010). In accordance with the research of Loo, Raylu & Oei (2008), there has been an increase in the participation of social gambling among Chinese communities as a result of the social acceptance of gambling within Chinese culture. In Taiwan, gambling activities are prohibited. The only legal gaming activity is the issuance of lottery from the government.

During the colony period of Japan in 1906, the Japanese government issued only five terms of lottery in Taiwan. The issuance of government lottery by the Japanese created no negative impact on society (Chen, 1994). In 1949, the KMT Party moved its base from Mainland China to Taiwan. In order to generate revenue sources to support public works, the Taiwan Provincial Government committed Bank of Taiwan to publish the “Patriot Lottery” in 1950 (MOF, 2009). As the economy was improving, there were three million citizens addicted to the illegal lottery “Everybody Happy Lottery” in the mid-1980s (Hu, 1995). To cease this social malady, the government decided to end the Patriot Lottery in 1987(Chen, 1994). The issue number of Patriot Lottery was up to 1171. In 2002, the government committed Taipei Fubon Bank to issue “Public Welfare Lottery” in order to collect fund for the social welfare. At present, there are computer lottery and scratch-off lottery, and the Taiwan Sports Lottery (MOF, 2009). Although the lotteries were issued with different purpose, the issuance a variety of lotteries still provided the Taiwan citizens a chance to both contribute the society and entertaining. As of today, the lottery is still popular in Taiwan. In addition, there are many parlors with electronic video games of chance operated underground.

With the economic and international trends evolving, the casino idea of Taiwan emerged during the 1990s. However, supporting or opposing casino business has been causing a lot of controversy (Her, 2001). In early

2009, the Taiwanese government finally has revoked a long-standing antigambling law and has passed a long-stalled bill to allow the casinos to be developed operated in the leisure resorts on outlying islands such as Penghu and Kinmen to help stimulate the economies. However, the first residents’ referendum to build Taiwan’s first casino has been rejected in 2009 because some local residents worry about possible negative impacts (Kok, 2009). In 2012, Matsu residents embraced casino gaming in a referendum, and wish to become a gaming haven for Chinese tourists (Lee, 2013). Up till now, the slow drive to bring casino gaming to Taiwan is reaching key milestones with the Gaming Act draft finally sent to the Legislative Yuan of Taiwan.

2.3 Tourism Development Issues in Taiwan

Due to the 2008 global financial tsunami, countries all over the world have tried to improve their economic conditions in 2009. In 2009, due to H1N1 and Typhoon Morakot, Taiwan’s tourism industry also experienced extraordinary impacts from the financial crisis. However, the Taiwanese government has tried to promote tourism throughout the hard time, the Tourism GDP grew steadily between 2009 to 2011 and contributed 2.34% to Taiwan’s GDP in 2011. According to the statistics of TBMOTC (2016a), the total tourism income from inbound visitors has reached to 14.388 billion US dollars in 2015. It accounts 4.92% of the total GDP for the year (Table 1).

Table 1 Tourism Income in Taiwan: 2009-2015 (US\$ Billions)

Item \ Year	2015	2014	2013	2012	2011	2010	2009
GDP percentage	4.92%	4.68%	4.20%	4.40%	2.34%	2.07%	2.07%
Income from inbound visitors	14.388	14.615	12.322	11.769	11.065	8.719	6.816
Number of inbound visitors	10,439,785	9,910,204	8,016,280	7,311,470	6,087,484	5,567,277	4,395,004

Source: The Tourism Bureau MOTC Taiwan, 2016a

According to the statistics of TBMOTC (2016b), the number of inbound visitors has come to 10 millions. In the past decades, the Japanese were always the top one tourist market for Taiwan. However, the number of Japanese tourists has dropped due to the economic downturn, the decrease in travel allowances from companies, and an increase of the fuel tax. Fortunately, the Taiwanese government has opened the gates to the Mainland China tourists in July 2008. At present, the top one inbound visitors has been replace by the tourists of Mainland China since 2010. The five visitor generating markets in 2015 were

Mainland China (4,184,102), Japan (1,627,229), Hong Kong/Macau (1,513,597), Korea (658,757), and U.S.A (479,452) (TBMOTC, 2016b).

Nowadays, while the East Asian tourism market is growing substantially, Taiwan’s tourism industry faces more competition than before. Hence, Taiwanese government is trying to integrate available tourism resources and casino gambling activities to attract more tourists. With the recent success experience of gaming-related investments made in Macau and Singapore, many regional governments across Asia are learning and looking at these successful models (Klaphake, 2012). This can be a good inspiration of developing the casino gaming industry in Taiwan.

3. Research Method

The main focus of this paper is on the largest and fastest growing segment of the Asia gaming economy—the casino gaming industry. The result of analysis will provide a look at the future development and to explore and determine the accurate direction of developing the casino gaming industry in Taiwan. With the analysis of the literatures, the result shows the important six factors of developing gaming business in Taiwan. They are geography environment (geography isolation, broad hinterland, development potential); accessibility (big carrying capacity airport, well-established infrastructure, integrated transportation network, sufficient parking space); human resource (well-trained employee, sufficient work force); tourism resource (accommodation and dining, extending scenic spots); tourist market resource (consumer purchasing power, stable tourist source); and the social aspect (examine problem gambling trends; public security, societal support) (Table 2).

Table 2. The Important Factors of Developing Casino Gaming in Taiwan

Factors	Conditions
Geography Environment	1. Geography isolation 2. Broad hinterland 3. Development potential
Accessibility	1. Big carrying capacity airport 2. Well-established infrastructure 3. Integrated transportation network 4. Sufficient parking space
Human Resource	1. Well-trained employee 2. Sufficient work force

Tourism Resource	1.Accommodation and dining 2.Extending scenic spots
Tourist Market Resource	1.Consumer spending/ purchasing power 2.Stable tourist source
Social Aspect	1.Examine problem gambling trends 2.Public security 3.Societal support

4. Findings

From the aspect of geography and environment, the geography isolation is derived from the point of view of any negative aspects can be regulated more easily when gambling activity is limited to a restricted geographical location. In addition, the usual process of opening casinos in a country is to permit it in outlying areas first. In the United States, for example, many states allow gaming only if the casino is located over water (Cypra, 2009). Hence, in accordance with the Taiwan government plans, the only areas qualifying for casinos are Matsu, Kinmen, Penghu, Green Island and Orchid Island in Taitung County, and Liuchiu in Pington County (Taiwan News, 2009). It is believed to make a push to Taiwan’s economically underdeveloped remote outlying islands. In addition, having broad hinterland and development potential are also important factors for developing casino gaming industry. In Taiwan, there is only Matsu passed a referendum allowing casinos on the island so far. However, the Matsu islands cover only approximately 29.60 square kilometers of land area which is much smaller than Kinmen and Penghu (LCGOW, 2008). Hence, many people have question mark in mind.

In the accessibility aspect, big carrying capacity airport, well-established infrastructure, and integrated transportation network are important factors. Questions about Matsu’s ability to convert itself into a major tourist destination always existed. Some of the main challenges relate to transportation facilities, the small size of the airports and harbors, and the limited number of planes and boats serving them. Other problems are the shortage of electrical power, water, waste treatment facilities, and the transportation network. Over 20 years ago, Macau casino magnate Stanley Ho and the Venetian group from the U.S. had visited and examined another outlying island Penghu in order to search for gaming development possibilities. However, due to the inadequate infrastructure of Penghu, they had to drop the idea (Wang, 2009).

Las Vegas, for example, is one of the most geographically isolated major cities in the continental United States. However, its convenient transportation network attracts thousands of tourists from everywhere in the world from time to time. Hence, in order to compete with neighboring countries and territories such as Singapore and Macau, Matsu will need to build massive scale type of casinos. In addition, it will need to have well-established infrastructure and the modernization of transportation network including the expansion of small airport to international standards, the upgrades of water supply and electrical power

facilities, and the improvement of waste treatment facilities (Wang, 2009). On the other hands, the construction of casinos in the special district of Taoyuan Aerotropolis which located near international airport has quick access to convenient facilities, and no need to make huge changes.

In the human resource aspect, well-trained employee and sufficient work force are important. Casino is a labor-intensive industry and demands a large and various work forces. In order to run casinos efficiently and smoothly, it is important to evaluate the supply and demand of local work force previously (Tsaur, Kuo, & Lo, 2000). For instance, the gaming business volume in Macau has been growing at a rather unexpected rate. It has caused the shortage of qualified labor (Leong, 2007). This labor shortage problem and trend result inevitably in the deterioration of the quality of new recruits. In Matsu, there are only around 9,755 permanent residents and those people tend to be elderly (Gaming Asia, 2013). The declining economy also led to a declining population in the island. In fact, the lack of jobs has forced many young people to leave Matsu to work in Mainland Taiwan. The shortage of qualified labor should be one of the human resource problems of developing gaming industry in Matsu. The rare human resource of gaming industry is a fact that can't be disputed; the labor shortage problem and trend are a critical issue and can't be overlooked. To have people trained after the casino opening would trigger the shortage of qualified labor.

The Taiwan government has to encompass a vision as to start professional training curriculum for people who are interested in the casino related industry way before the casino opening. Fortunately, some universities in Taiwan have thrown in manpower cultivation plan in preparing to prevent future labor shortage problem when opening casino. For instance, some has offered Gaming Operations and Management Focused Course Program in college. In addition, the core courses such as introduction to casinos, gaming management, and casino operations management; they also offered hospitality service, hotel management, restaurant management, resort management, and room division management courses.

In the tourism resource aspect, accommodation and dining, and the extending scenic spots are important factors. The charming and boast beautiful vistas of the islands and the villages of Matsu have made it possible to become a tourism destination. Due to the limitation of the inconvenient transportation, the limited water and electricity resources, and the reforming of the industrial structure, ecotourism is considered to be a potential strategy to support conservation of natural resources and to contribute to regional prosperity in Matsu. Furthermore, the island is under the impression that the inadequate quality and quantity of the tourist hotels, restaurants, and recreational facilities; some of the private sector including domestic and overseas business groups, has to undertake such major investment projects and built in Matsu. Taiwan government could encourage more private sectors including domestic and overseas business groups to undertake such major investment projects and built more quality tourist hotels, restaurants, amusement theme park, and leisure establishments in the island by providing guidance and assistance to improve the tourism resource of Matsu.

In the tourist market resource aspect, consumer spending/purchasing power, and stable tourist source is important factor. At present, the top one inbound visitors has been replaced by the tourists of Mainland China with considerable spending power (TBMOTC, 2014). Mainland China is only 20 kilometers away from Matsu, however, there are on average only 7,000 Chinese tourists visits to Matsu annually (The China Post, 2012). Matsu is trying to build a casino town to lure Chinese tourist whom has strong purchasing power. Nevertheless, the Mainland China government is opposed to it and has cited Chinese laws which outlaw gambling in Taiwan. The China government has declared that it would not allow its people to go to Matsu to gamble, and announced they will limit China residents' visitations to Taiwan if Taiwan approves draft legislation on Matsu island casinos (Lee, 2013). The Taiwanese politicians are targeting to attract more international tourists rather than just Chinese tourists as to boost Taiwan economy, this is one of the reasons they are considering setting up casinos in Taoyuan Aerotropolis.

In the social aspect, examine problem gambling trends, public security, and societal support are the important factors. The existing of a popular underground gambling and the large suppressed demand from illegal gambling activity in Taiwan would support the casino gaming industry. Clearly, there is a huge amount of unaccounted economic losses from underground gambling; the Taiwan government could turn this around and legalize gambling or make it a formal economic activity. In addition, a successful casino makes its customers feel secure from danger. The example of Las Vegas has proved that the comprehensive regulations and proper enforcement can minimize the risk of breeding criminal activity such as underground gangsters, drug trafficking, prostitution, and extortion (Her, 2001). Hence, prevention of crime, the number of police, and training program for security persons should be assessed and managed.

Pertaining to the survey of Chinatrust Real Estate Corp. in 2013, the number one choice of location from Taiwanese residents of setting up the casino in the special district in Taiwan is the Taoyuan Aerotropolis. In addition, there are 77.1% of Taiwanese residents in favor of the set-up of casino in the special district (CREC, 2013). Moreover, due to the first Taiwan casino is scheduled to open within few years and it offers higher salary structure in the gaming industry, which created a tremendous demand of eager Taiwanese people intending to learn casino gaming management, and wanting to work in the casino.

5. Conclusion

The concept of building casino gaming in Taiwan has been a controversial topic for many decades. The opponents have focused on issues of basic morality, public order, and safety (Her, 2001); in addition, in the fear of the "Cannibalization" phenomenon that will impact the local economy. However, there are research findings that casinos do not take away local business and they do create jobs. Furthermore, there is evidence indicating that casino gaming has a positive influence on tourism. (Kotler, P., Bowen, J., & Makens, J., 2010). The Taiwan government should understand the government supplementary measure in the gaming industry's development from the U.S. experience to avoid negative elements before developing casino gaming in Taiwan. Taiwan also can derive experiences naturally from the U.S. in gaming development if Taiwan inherits the development model from the U.S. magnate investor groups.

Typically, there are more and more counties having used or intending to use casino gaming as a tool to stimulate their economy or to solve their economic problems. Nowadays, while the East Asian tourism market is growing substantially, Taiwan's tourism industry faces more competition than before. Hence, Taiwanese government is trying to integrate available tourism resources and casino gambling activities to attract more tourists. With the recent success experience of gaming-related investments made in Macau and Singapore, it also can be a good inspiration of developing the casino gaming industry in Taiwan. In terms of the passing of the new legislation from the Taiwanese government, Taiwan could be the next potential country to join the Asian casino gaming market.

Whether if the Taoyuan Aerotropolis is doable or not, however, the Taiwan government should reconsider if the policy of legalizing casino gaming in the remote offshore islands is appropriate. Even though the residents of Matsu have voted yes on a referendum to allow the construction of Taiwan's first resort casino on the island, the Taiwan government should reconsider if the policy of legalizing casino gambling to boost the economy of remote islands is appropriate. In accordance with the findings of this study, Matsu and other outlying islands might not be an appropriate place to develop the casino gaming as a result of too many limits on accessibility, human resource, tourist market resource, and social aspect; these reasons also apply to other remote islands and counties (Chang, 2002 ; Lee, 2011).

We understand that Taiwan has no prior experience with casino development and the government has been extremely cautious in formulating a gaming act. As many Asian countries are planning or undergoing the gaming business, Taiwan should realize the fact that there is a regional shift toward the legalization of casino gaming. If Taiwan wants to capitalize in the gaming industry, the Taiwan government and communities must be vigilant in planning and accelerate a bit before the market share becomes well saturated. In order for Taiwan to catch the wave and profit from the market share earlier and to stop the flow of gaming spending offshore, Taiwanese government has to keep an eye on the trend of developing gaming industry and set in motion promptly. In addition, the rare human resource of gaming industry in Taiwan is a fact that can't be disputed; the labor shortage problem and trend are a critical issue and can't be overlooked. To have people trained after the casino opening would recommit the same error as Macau. The Taiwan government has to encompass a vision as to start professional training curriculum for people who are interested in the casino related industry way before the casino opening.

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