

BUSINESS BEST PRACTICES FOR THE GAMING AND HOSPITALITY INDUSTRY

# GAMING & LEISURE®

25.00 SUMMER 2021

INCLUDING RESORT AND ENTERTAINMENT TECHNOLOGY

## GAMING

Casino Revenues During the Pandemic  
Making the Most of a Downturn  
Modern Data Science  
ESG and Gaming  
with Rick Arpin

## TECHNOLOGY

Pulling Back the Curtain on Open APIs  
BELLA(issimo)  
and the Art of Customer Loyalty  
Goodbye Yellow Pages  
Strategic Scheduling  
with Dr. Mike Essig

## HOSPITALITY

Revenue Management Survey Results:  
Where Managers Spend Their Time  
The End of Casino Blocks

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Nature Inspired Design

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Phishy Scams: A Big Problem  
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Mass Shootings  
Impact on Business

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The Art & Science of  
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Gaming, Tourism & Finance Index  
with Applied Analysis

Becoming an Entrepreneur  
with Morgan Stanley





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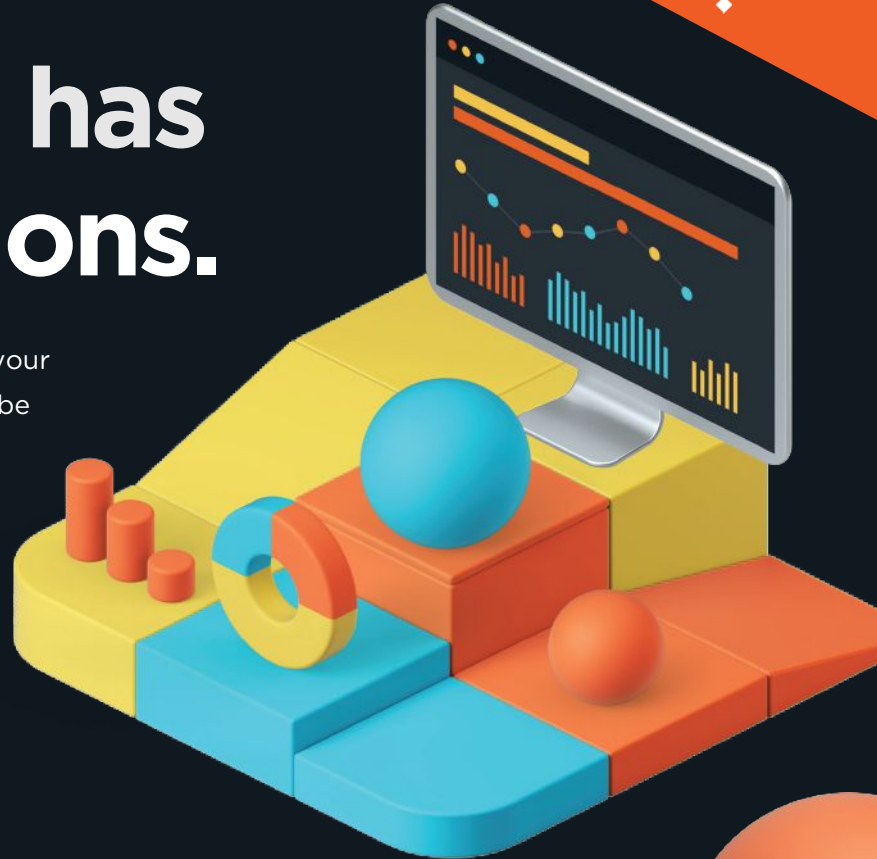


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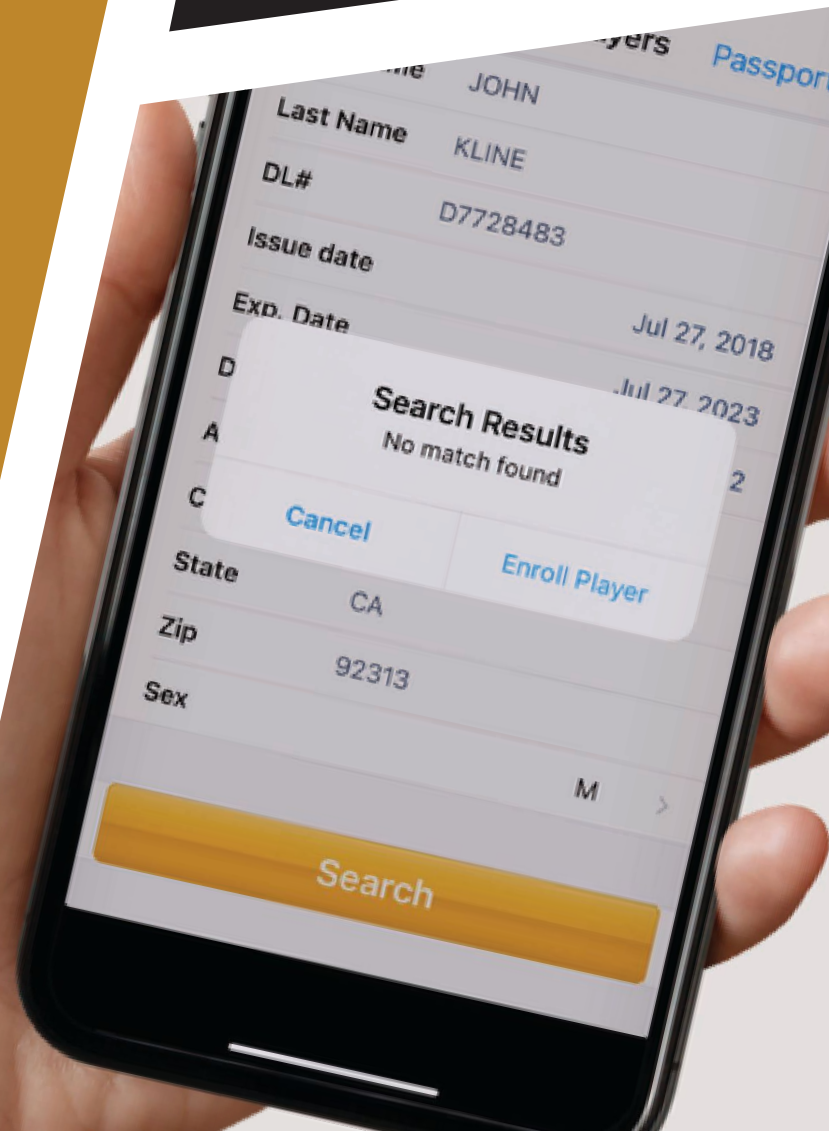
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# GAMING & LEISURE

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Small businesses create two out of every three net new jobs in the private sector. Morgan Stanley's David Chisholm offers tips to set up your business for long-term growth.

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#### 18 THE COMEBACK OF THE CASINO GAMING INDUSTRY, THROUGH THE LENS OF AN EXECUTIVE RECRUITER

Despite the setbacks the industry has faced, there will always be a need for passionate, hard-working people to help properties thrive. Benjamin Farber explains how casino gaming companies are ramping up employees and simultaneously revisiting expansion plans, increasing demand for talent.



### LEADERSHIP

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Everyone searches for a landing place, but if the change is constant, maybe it would make more sense to enjoy the ride instead. John Cash Filipe illustrates how to embrace the constant change of technology and innovation and how lending a helping hand can offer much-needed perspective.

#### 24 WHAT'S NEXT AND WHAT'S NEW? A HODGEPODGE OF THOUGHTS AND QUESTIONS

The world changed a lot during this forced hiatus, and like it or not, we have all been forced to live in a world with more questions than answers. Debbie Hawkins rethinks old ideas and ponders new challenges that seem to be hurtling at the industry at a rapid rate.

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## ANTITRUST ENFORCEMENT IN THE BIDEN ADMINISTRATION: FIVE THINGS TO WATCH

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### SECURITY

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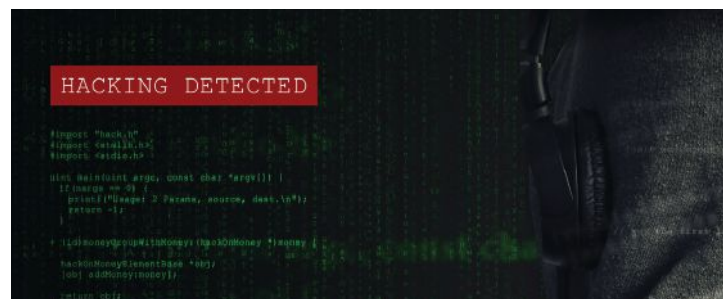
Everyone knows the abundance of scary data breach stories available. John Wondolowski explains the call to action properties must take and how protecting, governing and securing data is a non-optional business requirement.

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No one can afford to leave money on the table – especially after such a challenging year. Angie Dobney explains how to be nimbler and more adaptable to the many ways guests spend money on property by putting data at the core of your casino's revenue strategy.



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Barbados is known for a number of things, including their resorts and spas. Bill Healey sits down with Steve Andrews, spa owner and Global Wellness Ambassador for Barbados, who gives insight into the use of technology in spas, up-and-coming trends, and necessary changes due to the pandemic.



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Marketers use segmentation to reach a player group by choosing one or more variables. Heidi Hamers outlines the four categories of variables and offers real life examples of how to apply each type.

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Much of a technologists work can be done remotely, but someone often still needs to be on property to support equipment in person. Dr. Mike Essig outlines several strategic scheduling examples that can be used to prevent the spread of COVID.

#### 64 PULLING BACK THE CURTAIN ON OPEN APIS FOR HOSPITALITY

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#### 66 BELLA(ISSIMO): THE ART OF CUSTOMER LOYALTY

Now more than ever, the only constant is change – and your fate lies in how you respond to it. Ann Nygren examines a new banking company, BELLA, that is driven by community and powered by features that may prove to be disruptive in the industry.

#### 68 THE EXTINCTION OF THE “YELLOW PAGE” DIRECTORY?

With all information at your fingertips 24/7, have you even noticed that the Yellow Pages were printed for the final time in January 2019? Tami Wankoff gives the history of the printed phone directories and how modern day listing mistakes can waste your organization time and money.

### GAMING

#### 70 ESG IS HERE: IS THE GAMING INDUSTRY READY?

Environmental, social, and governance (ESG) reporting has been increasing in prevalence for several years. Rick Arpin discusses the next wave of requirements and how gaming companies will need to develop new processes to meet the coming challenges.

#### 74 CASINO REVENUES DURING THE GLOBAL PANDEMIC

Incurring costs to keep visitors safe while at the same time losing revenue is not easy for any business to ensure. Tom Doyle gives an overview of the Nevada, U.S. and Macau gaming markets and explains how pent-up demand may help increase revenues sooner rather than later.

#### 76 MAKING THE MOST OF THE DIFFICULT DOWNTURN

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#### 78 MODERN DATA SCIENCE IN THE GAMING INDUSTRY: ANALYSIS, PREDICTION AND OPTIMIZATION

The gaming industry is being modernized through data science. Thomas Kirschenmann explains how there is no limit to the careful application of mathematics in the gaming industry and how the most sophisticated operations are well on their way to achieving extremely optimized operations.

### NATIVE AMERICAN

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Even though virtual has been a lifesaver for organizations this past year, most people share the sentiment that it's just not the same. Shannon Bouschor explains what's been missing in 2021, and shares enthusiasm for what's to come.

### ARCHITECTURE

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Casinos have trailed behind the rest of the hospitality industry when it comes to blurring the line between the built environment and nature. Bob Gdowski shares the philosophy behind nature inspired design and how implementing it into casino design may be vital as people desire access to fresh air and green spaces more than ever post pandemic.

### G&L COMMUNITY

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# Just Jeannie. . .

This year, you can't throw a stick and not hit a report or analysis sharing all great news ahead for our industry. Our industry took one of the largest hits as our livelihood is predicated on providing in-person experiences for our guests to lose themselves in and drink life from whatever may be their fountain of choice. What bodes well for us is the deeper the 2020 hit, the greater the pent up demand for 2021. We provide plenty of supporting metrics in this edition about that, but we've also turned our focus on the human impact – the effects of the pandemic on us and our environment.

One of the best assets within the G&L Community is the interpersonal relationships within us that remind us we are all going through very similar circumstances. John Filipe's *Endless String of Events* aptly drives home that sentiment. David Torrealba provides practical steps to take if you have been laid off, and if you have, Ben Farber is likely going to find you your next career as he shares in the Comeback of the Industry from an executive recruiter perspective. BELLA(issimo) is setting the bar in the art of customer service and serves as a forward-thinking best practice on how to treat us humans. And an industry study finds that the highest revenue manager skill sets spend less than 50% of their time using their revenue management skill set! Learn how to change that in your organization while you're debating on the *End of Your Casino Blocks*.

However even amidst this enlightening content, Debbie Hawkins astutely points out that we indeed have more questions than answers on what is in store for us next as we all, knowingly or not, just leapt forward in a big way. The pandemic catapulted us forward five years from where we would have been in the digital economy. That's big. Crypto is being accepted in several mainstream businesses. That's really big. Even companies who were adamant a remote work force model would never work for them, have now seen how it definitely can and with ease given technology. Many of these companies have now adopted permanent remote work forces to leverage all the efficiencies this model yields. These topics and many more are all big, not only for each of us, but they also change the landscape of our society.

The primary impetus for these changes was the pandemic, however, the ability to navigate around the obstacles was sheer human ingenuity as well as the use of the technology that has changed our world in just the past couple of decades. My own humble observation is that in every century, it's mainly a handful of the highest IQ among us, typically the 150+ club, who are really the catalysts to propel our species forward, creating things the average person could not. This century these big brains have put their energy in not only our industry benefitting technology from SaaS to AI, but also to colonizing Mars. I readily admit my little brain cannot comprehend the push behind getting to Mars and now specifically by 2033; however, Jeff Bezos has shifted his focus from Amazon to do just that along with Elon Musk. Is it because the government and Navy have not only admitted there are UFOs but actually have shown us videos of them over Navy ships? Side note,

how is that not the biggest news on a daily basis? I fear my brain is unfortunately just big enough to realize the reason for the push will be a really, really big forthcoming reveal that will blow our minds perhaps as much as seeing colonies on Mars.

We hope to blow your minds, albeit on a smaller scale, with another great edition on tap for you including critical security and marketing solutions for your own new technology. And as scrutiny comes down on "big tech," we may find the forthcoming anti-trust laws trending in a broad manner cutting across all industries including ours. Learn how you may need to weave those into your company going forward.

Perhaps you've had enough mind-blowing contemplation for one edition? We've got you covered there, too. Join on our own Bill Healey's journey to Barbados and learn how *Barbados' Island Oasis* can relieve your over worked mind. In fact, we may see in our own U.S. hotels and casinos fresh air and green spaces coming soon as the Trend in Architecture is leaning toward what we humans innately crave, Nature inspired Design.

We love celebrating this 20th anniversary year with all of you. I'd like to thank our Board Members who shared their 20th G&L insights and thank our industry's top providers, the G&L Business Partners, who celebrated us with them in this edition. Everyone loves seeing themselves and their friends in G&L, so don't miss our 20th Anniversary Commemorative Edition complete with a 20-year photo recap coming this winter.

But, what has social media proven we love more than seeing our friends and ourselves in pictures? Our pets! Enjoy some campy fun as we introduce you to Banks, the G&L mascot dog, showing us on our cover how to relax this summer. Send us a pic of your pet doing something fun, and we may just pair your pet with Banks in an upcoming edition!

As always, I hope you enjoy this edition and thanks for welcoming G&L into your home and office this summer.

All the best,

Jeannie Caruso, CEO  
jeannie@mygamingandleisure.com



**HUGE 20<sup>th</sup> Anniversary Commemorative Edition**  
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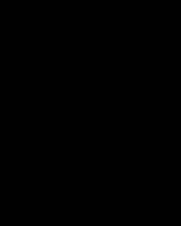
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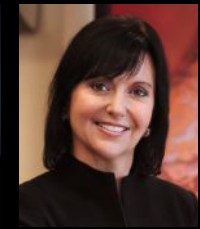
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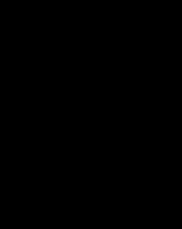
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## GAMING INDUSTRY: THE ROAD TO RECOVERY

The first quarter of 2021 signaled positive trends within the gaming sector as a number of jurisdictions posted their highest monthly gross gaming revenues since the start of the pandemic.

On a national level, gaming revenues in January and February of 2021 contracted by 7.8 percent and 14.6 percent, respectively, when compared to 2020. However, March 2021 saw the highest grossing month of all time with \$11.1 billion in revenue and was up 17.7 percent on the year, according to estimates by the American Gaming Association.

The vast majority of states with commercial gaming operations reported triple-digit annual growth rates in their March gaming revenues, with many reaching the highest levels in years. In Nevada, gross gaming revenues totaled \$1.1 billion in March, the highest monthly amount since 2013. Pennsylvania's gross gaming revenue topped \$300.0 million for the first time in two years, while Mississippi recorded its highest mark since July 2008 with \$248.8 million.

Despite the high points in March, trailing 12-month totals continued to lag prior year numbers for most states given mandated closures during the onset of COVID-19. While most states posted double-digit declines from the prior year on a trailing 12-month basis, Massachusetts and Mississippi climbed the furthest among larger gaming markets, falling a modest 5.1 percent and 7.7 percent below prior year values, respectively. While posting a relatively modest total amount of revenue, South Dakota was the only state to report growth in gaming revenue, improving 4.1 percent on the year.

Gaming revenue gains in the month of March reflected a consumer base growing more comfortable in an improving public health and economic environment. Increasing vaccination rates, falling COVID-19 infections and loosening social distancing requirements allowed

consumers to feel more comfortable venturing out and responding to pandemic fatigue a year later. Perhaps more important were increased household incomes sourced to another round of federal stimulus. In addition, limited entertainment offerings in a number of markets allowed consumers to migrate toward casino properties to fill their leisure time.

The conditions that pushed the national bump in March gaming revenues helped give the Las Vegas area its best tourism month since the pandemic started. Gross gaming revenues in the largest domestic gaming market came back to pre-pandemic levels in March 2021 with \$893.2 million in revenue, marking a 41.4 percent improvement from February 2021 and a 63.4 percent improvement on the year. For historical context, the latest tally of gaming revenues reflected the highest level for the month of March since 2006.

The directional gaming revenue trend in Las Vegas was mirrored in broader tourism metrics. Visitor volume reached 2.2 million, up 45.7 percent on the year. At the same time, the count of passengers moving through McCarran International Airport jumped from February with 2.6 million passengers in March. Convention attendance, an important driver of mid-week room occupancy, remained negligible in March, but a number of big conventions are scheduled for this summer. The market-wide room occupancy rate eclipsed 50.0 percent for the first time since February 2020, reaching 55.5 percent in March.

Overall, March marked a turning point in terms of optimism for the Las Vegas tourism industry, and positive developments in public health and the economy point to improved trends going forward. However, it is important to consider the impacts sourced to the burning off of public aid, along with the opening of other – potentially competitive – leisure activity offerings.

### Pandemic Restrictions Lifting

As the Centers for Disease Control and Prevention announced in mid-May that fully vaccinated people no longer need to wear facial masks while indoors, states and local areas quickly responded by adopting the policy. In Nevada, private businesses were given the option to set mask-wearing policies in line with CDC guidance. Major gaming operators responded quickly as Caesars, MGM, Sands, Wynn Resorts and others declared that masks would not be required for fully vaccinated guests. In a related development, Clark County officials approved plans to eliminate all social distancing requirements on June 1, which would allow gaming properties to operate at 100 capacity for the first time in over a year. Similar changes have taken place, or will be taking place, in most domestic gaming markets.

Throughout the pandemic, limited operating capacities and social distancing limitations have affected gaming revenues around the nation. Those impacts continued into the first quarter of 2021, as 14 of the 25 states

State	March 2020	March 2021	Annual Growth
Nevada	\$618.0 million	\$1.1 billion	72.7%
Pennsylvania	\$127.6 million	\$300.0 million	135.2%
Mississippi	\$110.3 million	\$248.8 million	125.6%
Louisiana	\$97.1 million	\$225.1 million	131.8%
New York	\$97.3 million	\$216.1 million	122.1%
Ohio	\$71.8 million	\$215.9 million	200.6%
Indiana	\$90.6 million	\$205.4 million	126.6%
New Jersey	\$85.4 million	\$189.0 million	121.4%
Missouri	\$76.7 million	\$176.7 million	130.3%
Maryland	\$68.7 million	\$169.2 million	146.4%

Sources: Nevada Gaming Control Board; Pennsylvania Gaming Control Board; Mississippi Gaming Commission; Louisiana Gaming Commission; New York State Gaming Commission; Ohio Casino Control Commission; Ohio Lottery; Indiana Gaming Commission; New Jersey Division of Gaming Enforcement; Missouri Gaming Commission; Maryland Lottery and Gaming Commission

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with commercial gaming were forced to limit occupancy to below 50 percent at some point in the first three months of the year. Many of those limitations have already been eased, with many states on track to reduce or eliminate social distancing requirements by summer.

The following provides highlights of first quarter earnings reports and activity from selected operators.

### Sands Exiting Las Vegas

In March, Las Vegas Sands (LVS) announced the \$6.3 billion sale of its Las Vegas properties to Apollo Global Management in a transaction that is expected to close by the end of this year. Sands will maintain its operations in Macao and Singapore while exploring new opportunities in the United States.

Sands also posted improving, sequential revenue growth. While revenue in the first quarter reached \$1.2 billion (excluding the Las Vegas operations subject to sale), topline revenues were down 15.6 percent from \$1.4 billion a year ago. Overall adjusted property earnings before interest, taxes, depreciation and amortization (EBITDA) fell 30.1 percent to \$244.0 million.

In Macao, Sands experienced a modest 4.5 percent decline in net revenue to \$777.0 million in the first quarter of 2021. Revenues at Venetian Macao grew 7.9 percent year over year to \$340.0 million, while revenue at The Plaza Macao & Four Seasons Hotel Macao grew 58.9 percent to \$170.0 million. Activity in Singapore also improved but not to the extent of Macao, with net revenues reaching \$426.0 million, down 30.4 percent on the year during the first quarter.

Sands reported revenue of \$139.0 million from its Las Vegas operations during the quarter, which marked a 61.9 percent drop from the \$365.0 million in revenue one year ago.

EBITDA was also well below non-pandemic volumes, posting a loss of \$47.0 million in the first quarter. Interestingly, slot handle increased from a year ago to \$625 million during the latest quarter.

### Macau and Boston Boost Wynn

Wynn Resorts (WYNN) posted company-wide net revenues of \$725.8 million in the first quarter of 2021, falling 23.9 percent from \$953.7 million reported a year ago. Meanwhile, adjusted property EBITDA turned from a loss of \$5.3 million a year ago to a profit of \$58.9 million in the first quarter of 2021.

Operations in Las Vegas reported a 44.8 percent decline in net revenue to \$178.7 million, while operations at Wynn Boston Harbor reported revenue of \$130.1 million, down just 7.7 percent from the first quarter of 2020. Wynn's domestic properties also saw earnings growth from one year ago with operations in Las Vegas more than doubling to \$28.1 million and operations in Boston jumping to \$30.4 million.

Wynn's Macau properties posted net revenue of \$417.0 million in the first quarter of 2021, marking a 14.7 percent decline from the \$489.0 million in revenue from one year ago. The company also reported adjusted EBITDA in Macau of \$43.9 million, up 49.5 percent from one year ago.

### MGM Domestic Operations Improving

In the first quarter of 2021, MGM Resorts International (MGM) reported \$1.6 billion in net revenue, an improvement from last quarter but down 26.9 percent from the \$2.3 billion one year ago. Total adjusted earnings before interest, taxes, depreciation, amortization and rent (EBITDAR) also continued to improve, growing to \$217.9 million over the



quarter, 26.2 percent lower than one year ago.

MGM's domestic properties reported a combined \$1.3 billion in net revenue, down 32.4 percent from the first quarter of 2020. The Las Vegas Strip segment continued to grow quarter over quarter to start the calendar year with \$545.0 million in net revenue. MGM's domestic adjusted property EBITDAR fell 16.5 percent from a year ago to \$350.1 million.

Operations overseas displayed continuing improvement as MGM China posted total net revenues over the quarter of \$296.4 million, up 9.0 percent on the year. Adjusted property EBITDAR sourced to MGM China measured at \$4.8 million, reversing a loss of 22.0 million in the first quarter of 2020.

### Regional Operations Benefit Caesars

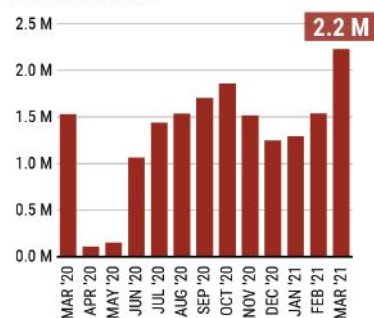
Operating volumes for Caesars Entertainment (CZR) edged closer to pre-pandemic levels in the first quarter, yet overall net revenue remained down 21.8 percent from a year ago to \$1.9 billion. Adjusted EBITDA increased 33.7 percent to \$548.0 million.

Caesars' Las Vegas properties generated net revenues of \$497.0 million in the latest quarter, down 39.5 percent from \$822.0 million a year ago. Adjusted EBITDA sourced to the company's Las Vegas properties grew over the quarter to \$162.0 million but remained 26.7 percent below the value from the same time period one year ago. Regional operations performed better than Las Vegas properties as the net revenue for the first quarter of 2021 reached \$1.3 billion, down 11.5 percent from the \$1.4 billion of one year ago. Adjusted EBITDA sourced to regional operations soared to \$418.0 million and was up 69.2 percent on the year.

*Brian Gordon is a principal with the Nevada-based advisory services firm, Applied Analysis. Gordon has extensive gaming and leisure experience from an accounting, finance and operational perspective.*

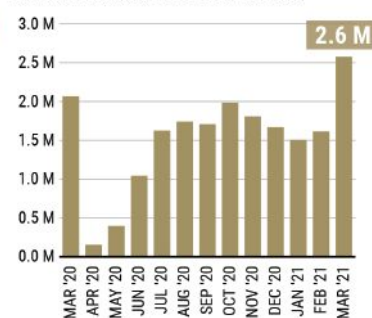
### LAS VEGAS TOURISM TRENDS

VISITOR VOLUME



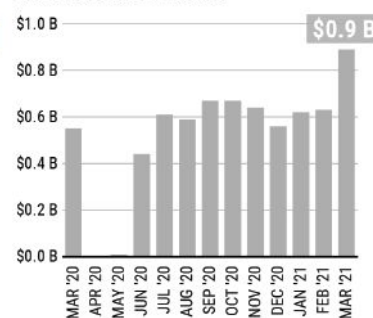
Source: Las Vegas Convention and Visitors Authority

MCCARRAN AIRPORT PASSENGERS



Source: McCarran International Airport

GROSS GAMING REVENUE

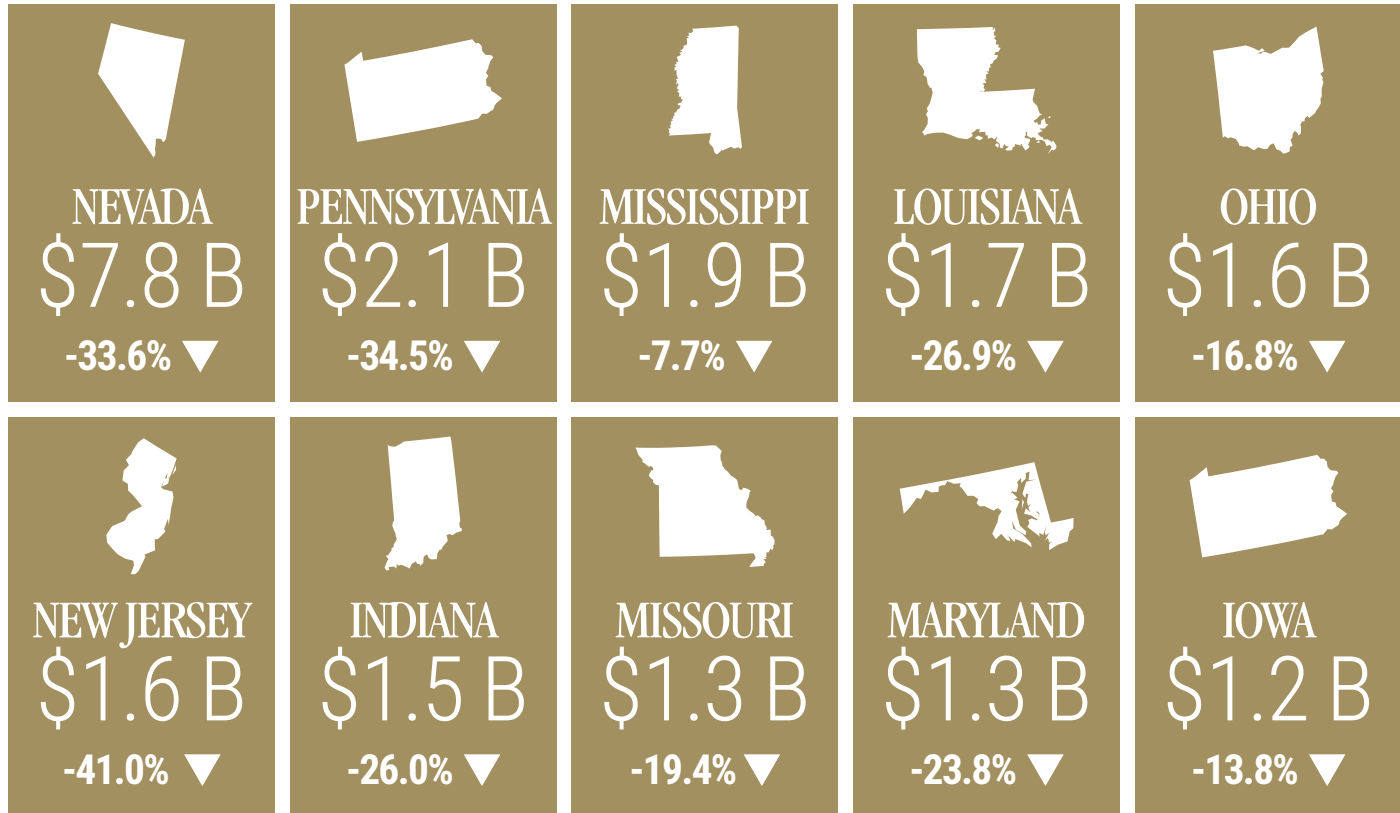


Source: Nevada Gaming Control Board

# SELECTED MARKET INDICATORS

## TOP 10 U.S. MARKETS

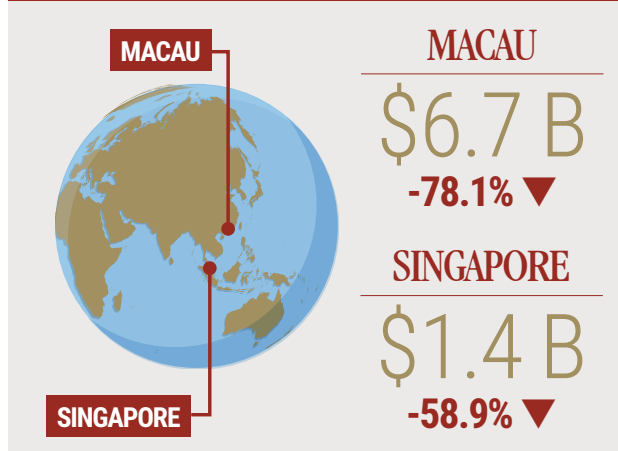
GROSS GAMING REVENUE (COMMERCIAL CASINOS)



Trailing 12-month totals through March 2021. Percent change from prior year.

## INTERNATIONAL MARKETS

GROSS GAMING REVENUE



Macau value as of the 12 months ended March 2021.  
 Singapore value as of the 12 months ended December 2020.  
 Note: Stated in US dollars. Percent change from prior year.

## MARKET SPOTLIGHT

NEVADA STATEWIDE GAMING REVENUE



Source: Nevada Gaming Control Board.

**APPLIED ANALYSIS**



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*Cheers to 20 Years*  
*... and many more to come!*



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# 2021 NATIONAL GAMING GROWTH FORECAST

Jay Sarno



Our 2021 forecast updated to include COVID-19 impacts is:

- While not as materially meaningful as compared to prior years, we are seeing full year 2021 as compared to full year 2020 showing growth in revenue of between +5% and +10% nationally. This is due to the obviously easier comparisons for 2021 versus 2020. Conversely, as compared to 2019, we see little to no overall growth. Keep in mind that 2019 was the best for overall gaming results.
- For states with existing gaming the declines in 2020 revenue as compared to 2019 was an average decline (-37%) and range of between -12% to -57% as certain regions harder hit than others. For example, NY closed for nearly six consecutive months. Both VA and KY both are relatively new entrants, and their gains are extreme outliers.
- In 2021 from a simple math perspective, for each month opened when the same month in 2020 was closed, the increase will be +8%. This will cumulatively rise as each month closed passes.
- Individual property results will rely heavily upon each properties state governance and the property's ability to grasp and quickly adapt to new situations as they arise.

## Free Play data-

Our research suggests that ROI of Free play (the return on investment for each \$1 of promo credit/free play spend) rates at/below \$3:1 need to be monitored for too much reinvestment spending. Conversely, too much over \$5:1 suggests that there is potentially not enough Free Play spend in that the redeeming clients are not finding value in offers and likely going elsewhere. **Nationally, post-COVID, reinvestment levels have mostly decreased and this is confirmed as ROI is increasing to \$7:1 or higher. Keep in mind the figures below are on total win and total free play. If you are using rated win as metrics to compare, your results will likely be lower.**

Values	State	StateZip	2019-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12	2021-01	2021-02	2021-03
FreePlay	CT	6338	\$10	\$0	\$0	\$5	\$7	\$7	\$6	\$6	\$9	\$6	\$6	\$5	\$6
	FL	33010	\$9	\$0	\$0	\$3	\$4	\$5	\$7	\$8	\$8	\$8	\$8	\$8	\$10
	NJ	8221	\$28	\$0	\$0	\$0	\$19	\$27	\$31	\$28	\$22	\$19	\$24	\$21	\$23
	NY	12201	\$32	\$0	\$0	\$0	\$0	\$0	\$7	\$12	\$13	\$13	\$12	\$11	\$13
	OH	43601	\$25	\$0	\$0	\$10	\$21	\$23	\$23	\$27	\$24	\$23	\$23	\$21	\$25
	PA	19104	\$53	\$0	\$0	\$7	\$29	\$37	\$36	\$39	\$33	\$12	\$29	\$32	\$44
% Fp to Rev	CT	6338	11%	#DIV/0!	13%	7%	8%	9%	8%	10%	18%	10%	10%	8%	8%
	FL	33010	15%	#DIV/0!	#DIV/0!	13%	23%	26%	19%	20%	20%	20%	18%	19%	18%
	NJ	8221	17%	#DIV/0!	#DIV/0!	#DIV/0!	17%	19%	22%	21%	21%	20%	21%	20%	17%
	NY	12201	14%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	6%	7%	9%	9%	7%	7%	6%
	OH	43601	16%	#DIV/0!	#DIV/0!	15%	13%	15%	16%	18%	21%	20%	17%	15%	13%
	PA	19104	23%	#DIV/0!	#DIV/0!	12%	17%	22%	23%	25%	26%	28%	21%	22%	22%
ROI FP to SltWin	CT	6338	\$9	#DIV/0!	\$8	\$15	\$12	\$11	\$12	\$10	\$6	\$10	\$10	\$12	\$13
	FL	33010	\$7	#DIV/0!	#DIV/0!	\$8	\$4	\$4	\$5	\$5	\$5	\$5	\$5	\$6	
	NJ	8221	\$6	#DIV/0!	#DIV/0!	#DIV/0!	\$6	\$5	\$5	\$5	\$5	\$5	\$5	\$5	
	NY	12201	\$7	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	\$17	\$15	\$11	\$11	\$14	\$14	
	OH	43601	\$6	#DIV/0!	#DIV/0!	\$7	\$8	\$7	\$6	\$6	\$5	\$5	\$6	\$7	
	PA	19104	\$4	#DIV/0!	#DIV/0!	\$8	\$6	\$4	\$4	\$4	\$4	\$4	\$5	\$5	
Total FreePlay			\$158	\$0	\$0	\$26	\$79	\$98	\$111	\$120	\$109	\$80	\$102	\$98	\$120
Total % Fp to Rev			17%	#DIV/0!	13%	11%	15%	18%	16%	17%	19%	16%	15%	15%	14%
Total ROI FP to SltWin			\$6	#DIV/0!	\$8	\$9	\$7	\$6	\$6	\$6	\$5	\$6	\$6	\$7	\$7

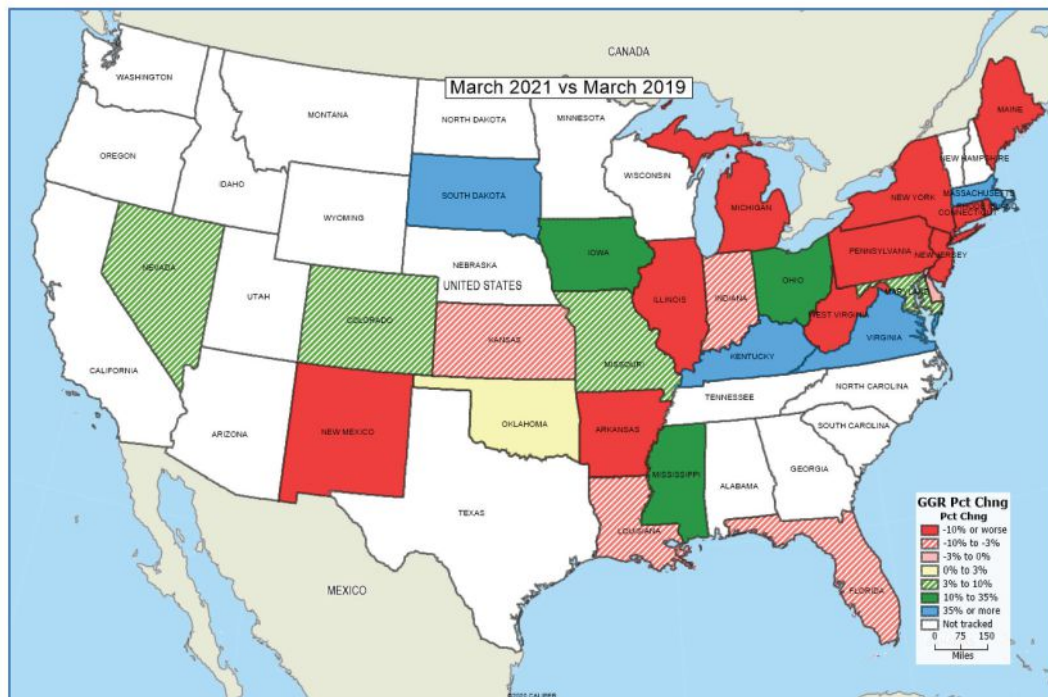


## 2021 NATIONAL GAMING GROWTH FORECAST

### Year to year Total Win change in dollars (millions)

State	Region	2021-01 vs 2019-01	2021-02 vs 2019-02	2021-03 vs 2019-03	VS	VS	VS	VS	VS	VS	VS	VS	VS	
AR		71901	(\$1.5)	\$7.1	(\$5.1)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
CO		80201	(\$1.1)	(\$1.4)	\$3.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
CT		6338	(\$9.7)	(\$22.4)	(\$18.1)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
DE		19803	\$5.3	\$2.5	(\$0.5)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
FL		33010	(\$3.5)	(\$5.5)	(\$3.3)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
IA		50009	\$24.9	\$10.5	\$23.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
IL		60601	(\$68.5)	(\$19.5)	(\$21.1)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
IN		46201	\$8.7	(\$36.6)	(\$8.3)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
KS	(blank)		\$1.6	(\$4.4)	(\$1.5)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
KY	(blank)		\$20.3	\$17.5	\$17.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
LA		71033	(\$13.1)	(\$50.6)	(\$21.3)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
MA	(blank)		\$25.7	\$33.4	\$42.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
MD		20606	(\$8.2)	(\$10.6)	\$5.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
ME		4103	(\$2.4)	(\$2.9)	(\$2.7)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
MI		48201	(\$25.3)	(\$27.9)	(\$29.5)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
MO		63124	\$21.0	(\$11.8)	\$10.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
MS		39201	\$19.0	(\$2.9)	\$36.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
NJ		8221	(\$17.3)	(\$48.4)	(\$38.3)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
NM	(blank)		(\$19.5)	(\$19.5)	(\$23.8)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
NV		89109	(\$222.7)	(\$238.8)	\$44.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
NY		12201	(\$29.7)	(\$56.9)	(\$37.2)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
OH		43601	\$12.6	\$3.7	\$31.7	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
OK		73105	(\$0.4)	(\$2.6)	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
PA		19104	(\$62.7)	(\$60.7)	(\$38.5)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
RI		2865	(\$21.9)	(\$20.5)	(\$18.8)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
SD		57732	\$0.9	\$2.2	\$5.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
VA	(blank)		\$16.1	\$14.8	\$21.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
WV		26003	(\$4.6)	(\$20.8)	(\$11.1)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>			<b>(\$355.9)</b>	<b>(\$572.9)</b>	<b>(\$36.9)</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>

National results: Variance recent month to same month in 2019, heat-map





# BECOMING AN ENTREPRENEUR

## Five Critical Strategies for Strengthening Your Business



As a small business owner, you are playing a big role in driving our nation's economy. According to the U.S. Small Business Administration, small businesses create two out of every three net new jobs in the private sector.

Currently, there are over 30.7 million small businesses in the U.S., accounting for 47.3% of all U.S. employees.<sup>1</sup>

If you're like most entrepreneurs, you wear many hats, including overseeing the finances of your business. Each day, you face critical decisions that may have an enormous impact on the future success of your company. Questions about day-to-day cash flow, attracting and retaining talented employees and balancing finances at work and at home are just some of the challenges you must consider as you grow your business.

Every business is unique, but the five critical strategies for strengthening a business for long-term growth are the same, no matter what you sell:

### 1. Managing Cash Flow

Having an effective cash flow strategy can assist you in keeping your finger on the pulse of how quickly and effectively cash is moving in and out of your business, while also working to enhance the yield on your short-term assets. You'll also need skills and resources to address a broad range of credit structures.

### 2. Protecting Your Assets

Unforeseen events can jeopardize the value of your business. What if something happens to you, or another person who is critical to the success of the business? Or what if you get

sued? Knowing what risks you face and how to avoid the loss they can cause can give you the freedom to run your business successfully. Some protection strategies to consider include business insurance, as well as a comprehensive asset protection plan.

### 3. Attracting and Retaining Talented Employees

The most valuable asset of any growing business is its employees. Rewarding and motivating key people with benefits such as a retirement plan is critical to the ongoing success of your business. In addition to helping to attract and keep good employees, there are potential tax benefits to offering a solid retirement plan. But what type of plan is the right fit for your business?

Each plan has its advantages and disadvantages, so it's important that you understand all your options to determine which plan is most appropriate.

### 4. Optimizing Investment Decisions

Whether in business or on the personal front, you may be reluctant to shoulder the responsibilities associated with managing an investment portfolio. Discretionary accounts are ideal for busy business owners who don't have the time to connect with their Financial Advisor on every decision. The timeliness of transactions can make a significant difference not only by enabling portfolio trading when you are not contactable, but also when price sensitive announcements demand immediate portfolio action. This differs from non-discretionary accounts where clients must authorize trades for every decision.

### 5. Integrating Your Business Plan with Your Personal Plan

Your business is a critical component of your

personal wealth plan, so your business plan and personal wealth plan need to work together to increase the value of both.

With so many responsibilities to juggle, you may not have the time—or the inclination—to tackle these five critical strategies on your own. Consider establishing a Wealth Advisory Team that includes a Financial Advisor, corporate attorney, estate attorney, accountant and investment banker or business valuation specialist to help you make informed decisions about your business and personal finances. Your Wealth Advisory Team can help you integrate your business plan with your overall wealth plan, freeing you to stay focused on what you do best—growing your business.

<sup>1</sup> U.S. Small Business Administration. 2019 Small Business Profile. Available at <https://www.sba.gov/sites/default/files/advocacy/2018-Small-Business-Profiles-US.pdf>. Accessed June 28, 2018.

**Disclosures**  
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*/,äntrəprə'nər,äntrəprə'noo(ə)r/*  
*noun: entrepreneur; plural noun: entrepreneurs*  
*a person who organizes and operates a business or businesses, taking on greater than normal financial risks in order to do so.*



# Congratulations to Gaming & Leisure on 20 years of success!

And thanks to Jeannie and her entire team for 20 years of providing an amazing community of knowledge-sharing, networking, and insight for our industry.



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and looking forward to another 20 years!



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# WHAT TO FOCUS ON IF YOU'VE BEEN LAID OFF



Whether you expect it or not, losing your job always leaves you shaken up and doubtful about your future. When, on top of that, you know you're going to be dealing with a very hard labor market, things can get pretty scary.

The COVID-19 pandemic has pummeled the U.S. economy and led 47 percent of the workforce to apply for unemployment benefits. In times like these, job hunters need to maneuver correctly and take the right steps to get back on their feet. Knowing exactly what to do can be tricky, though, so here are some ideas to organize your life if you've recently been laid-off.

## Take a Breather

Layoffs are emotionally hard. As much as you want to get moving again to change your situation, it's important that you give yourself some time to process everything. Taking action without dealing with your vulnerability can be counterproductive; so don't underestimate your need for a break.

Talk to your loved ones, and get everything out of your chest. Do something to get out of your head for a little bit – like a day trip or simply indulge in a day of doing nothing. You have a long way ahead of you, with plenty of things to keep you occupied, so enjoy this moment of peace and recharge your batteries.

A lot of negative emotions come along with losing your job, so take the time to process them. Feel what you need to feel, and

analyze the situation. After giving yourself this little breather, move on.

## Take Care of Practicalities

If you have ever lost a job before, you know that, unfortunately, things don't end when you receive your notice. There are a lot of things to settle with your employment, including a ton of paperwork. Taking care of this is very important, so get it done immediately.

Reach out to the people in charge and fill out any unemployment and health insurance forms you need. Have them explain your severance package, and make sure that you're getting all that you're entitled to. Figure out when you'll get your last paycheck and how much money you'll receive.

If you have a good relationship with your superiors, sit down with them and ask all the questions you need. For the future, you must understand the reasons behind your lay-off. They might give you insights into how your industry was affected by the pandemic, and this knowledge will prove valuable in your search for new positions. Ask for a recommendation letter right away, while your performance is still fresh in their memory.

## Revamp Your CV

It doesn't matter if you're planning to change careers or, on the contrary, stay in the same field you were in. It's vital that you revamp your resume to showcase progress you have made since the last time you worked on it.

Dedicate a day to update your resume, or create a new one if your current one doesn't represent you anymore. It's important that

your CV reflects efficiently your skills, education, and experience. If you're unsure of how to do this, find examples on the internet from people in the industry.

It's a good idea to quantify some of your data, so you can show concrete accomplishments. This is a way to show what your value was in your last employment. If you can, mention specific projects you worked on, and their results.

The labor market has changed a lot since the appearance of COVID-19, so figure out what skills are important in your industry right now. Remote work is practically a norm these days, so tech proficiency is regarded as a big plus by recruiters. Using your free time to gain new skills will not only make you more attractive as an employee, but also help your mental state.

## Conclusion

The job market might be difficult right now, but your success in looking for employment will be defined by your consistency and organization. Working smartly toward your goal every day will eventually result in a new position. Don't get discouraged, and focus on the only thing you can really control, yourself. Things will improve, and maybe they will even be better than before.

*David Torrealba is a journalist, illustrator, and SEO writer. He has been creating content for blogs, social media, newspapers, and websites since 2016.*

# 20<sup>TH</sup> ANNIVERSARY




"G&L IS A WONDERFUL SOURCE OF WHAT'S HAPPENING IN OUR INDUSTRY! THIS IS NOT BY ACCIDENT AND THIS IS NOT JUST ANOTHER SOURCE FOR INFORMATION. THIS IS BECAUSE OF THE PASSION AND ALL OF THE HARD WORK PUT FORTH BY JEANNIE AND HER TEAM! WE CAN ALWAYS EXPECT TO SEE WHAT'S CHANGING, COMING, FAILING OR JUST GET SIMPLE INFORMATION ON GAMING FROM G&L. THANK YOU JEANNIE AND TEAM!"

VIRGIL DeBROSSE, IT EXEC. DIR. CASINO AND HOSPITALITY APPLICATIONS, CHICKASAW NATION DIVISION OF COMMERCE



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# THE COMEBACK OF THE GAMING INDUSTRY THROUGH THE LENS OF AN EXECUTIVE RECRUITER



The light at the end of the tunnel has come sooner than anticipated in the Casino Gaming industry. As COVID-19 cases dwindle and vaccines roll out to the rest of the population, states are lifting restrictions to the point

where society can be as close to normal as expected during a global pandemic.

Over a year has passed since the coronavirus hit, and most professionals foresee the resurgence in the Entertainment and Hospitality industries to follow suit with Casino Gaming. Society has learned to adapt to the “new normal” and has taken the necessary precautions to be healthy and comfortable. Casino guests have missed visiting their favorite casino properties and look forward to the thrill and excitement that the industry has to offer in person.

Despite the setbacks and recessions that the industry has faced, there will always be a need for passionate and hard-working people to help Casino Gaming companies thrive. In 2020, many organizations had to downsize to keep their businesses afloat, while others fought to keep their doors open throughout the pandemic. Now that guests are beginning to feel comfortable and are willing to go to properties, employees are needed back to accommodate the incoming visitors. Simultaneously, companies are revisiting their expansion plans, increasing the demand for new talent.

Considering a new career opportunity has always been risky for employed professionals, especially when it involves relocation, candidates are even more hesitant to consider new job opportunities when factoring in the pandemic. Depending on state regulations, candidates are now required to adjust to a socially distant interview and onboarding process. The modified process can feel daunting for candidates as they contemplate whether it is worth taking that leap of faith. To attract



strong talent to their workplace, employers should also reflect and reinvent methods that will create a smooth and welcoming experience for their new employees.

As an executive search firm that has been recruiting for Casino Gaming and Hospitality companies for nearly 55 years, it is an incredible and humbling experience to witness the industries we have serviced evolve throughout the years. Casino properties are continuing to grow into full destination resorts, adding hotels, outlets, entertainment facilities, and dining options that cater to people of all ages. The iGaming and mobile sports betting sectors have also gained an uptick, providing consumers in legalized states access to a wide range of betting options in the comfort of their own homes.

Our search firm projected and prepared for a huge industry comeback in the next year or two, but Casino Gaming’s rapid resurgence in early 2021 exceeded our expectations. Our executive recruiters have been busier than ever, servicing new and existing casino clients looking to find top talent for their executive leadership. Our team is doing a fantastic job managing the influx of searches and constantly making improvements to ensure a streamlined process. Furthermore, our focus on providing quality service and building long-term relationships with clients and candidates has played an integral part in our firm becoming

a reputable resource for leading companies. As my uncle and second-generation owner would always say, “Success begets success.”

According to our 20th Annual Casino Gaming Executive Satisfaction Survey Results, 80% of casino executives are optimistic about the future of their careers, even in the middle of the pandemic. Through my years of experience working with clients and candidates, I have found that those who have a positive outlook usually end up yielding the best results in their professional and personal endeavors. As long as Casino Gaming companies and their leaders remain resilient and positive for what is ahead, a brighter future will surely follow.

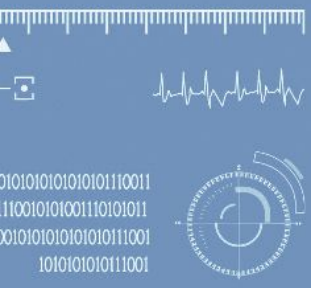
*Benjamin Farber is President of Bristol Associates, a boutique executive search firm founded in 1967. He also represents the third generation of proud family ownership. With nearly 20 years’ experience recruiting key executive and management-level roles for all verticals, Ben has completed hundreds of placements around the world. And as one of the top consultants in the field, he is well-versed in all areas of executive search, including compensation analysis and contract negotiations. For more information, visit our website at [www.bristolassoc.com](http://www.bristolassoc.com). For employer or candidate inquiries, email Ben at [bfarber@bristolassoc.com](mailto:bfarber@bristolassoc.com).*



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Club Level: Jade  
Loyalty #: 232768  
Last Visit: 12/01/20  
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# ENDLESS STRING OF EVENTS



I was asked the other day why I didn't seem affected by all the changes to the COVID restrictions, politics, and basically everything. Sometimes I respond with, "it is what it is," and keep moving on. The truth is, I absolutely hate that saying, but it always answers

the question for the people who ask.

The actual answer about why I am not outraged by injustice, why I am not shocked by the restrictions we have been forced to live under, why I am not upset that half of the world isn't listening to the other half and vice versa is that I am, but I know something that up until recently I thought everyone knew.

## Life Is An Endless String Of Events

Anyone in technology is pretty much indoctrinated into this mindset relatively early. The changes are constant and endless. The next new hack is the one you need protection against, the next new system is the one you must implement, and the next new regulation is the one you must work with. Most people spend so much time jumping from one project to the next that over time they inherently hope there is a landing place.

## Spoiler Alert, There Isn't

Life is like that as well. When I was younger – a lot younger – I wanted to do a bunch of different things. Mostly I wanted to be a rock star. Guess what I am not? A rock star. Oh, I tried. I did everything I could think of to get one more minute on the stage. I even did lighting and sound for \$80 a weekend for any band that would have me, just so I could get in front of that microphone occasionally. Then I had an epiphany. I'm not that talented! What I did find out was that I was good at stage lighting. Then the plan changed from rock star to either working for a major show or going to college and getting a degree in lighting design. Oddly enough, I didn't have

any money for college, so I decided to try and become a roadie for a major act.

## Lynyrd Skynyrd To Be Exact

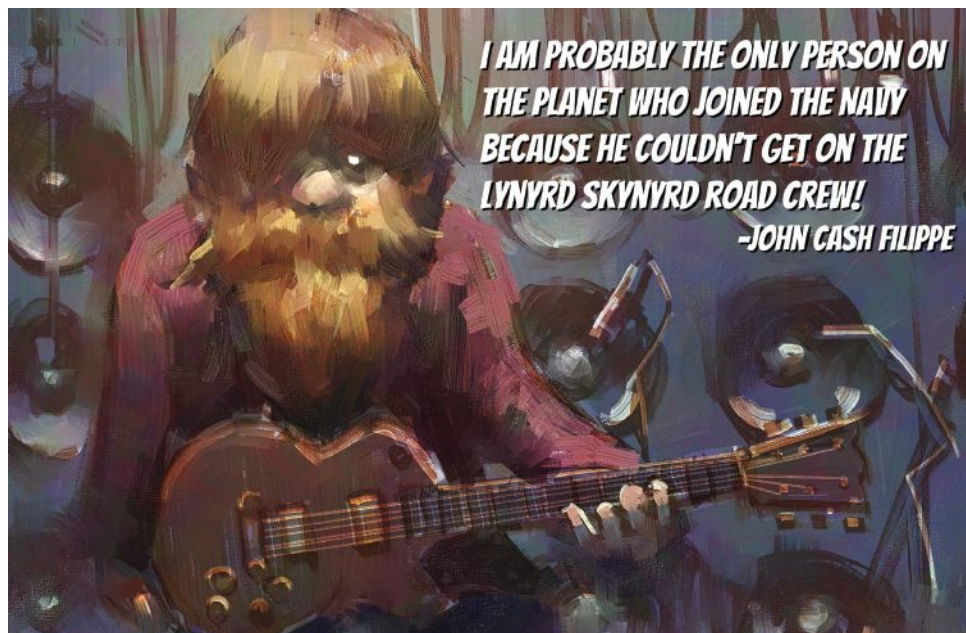
I had been working for a band called Top Cats at that time, which was formed by members of Strawberry Alarm Clock, which was formed by Ed King, a guitarist for Lynyrd Skynyrd. I asked if they could get me on the Oct. 27, 1987-opening show of their reunion tour as part of the crew. I was eventually told that the road crew was already booked with the people that they known originally. It was another crushing blow to my plans. So, running out of options to make my dream come true, I joined the U.S. Navy to earn enough money to go to college and become a lighting designer.

I am probably the only person on the

reader, get off this train and find the platform where you can all quickly disembark? Because isn't that what we are always seeking? A platform or a landing spot, a place to stop, take a breath and call it good? That series of check marks that lets us know we are closing in on the end of the list and tells us we are done?

I have some good friends that I look at as "landed." They always seem so perfect, and so in control of the events around them. Then I get to know them, and I find that they are thinking the same of me, or of someone else. They are riding the same endless string of events that I am, and they are also looking for a landing place that is just out of reach.

This is the way I choose to see this pandemic, and well, everything. I look at it as another of the many endless strings of events that have gotten me to where I am. Like all



Courtesy of iStock.com

planet who joined the Navy because he couldn't get on the Lynyrd Skynyrd road crew!

I could give you my entire series of events that led me to the place where I am now, but it would bore all of you to tears. So where am I trying to get to exactly? Where can you, as a

the many events I have been fortunate or unfortunate to be involved in, this is just one more. On the bright side, when we are 80 years old, we will look at our grandchildren and say, "When I was young, I had to wear a mask everywhere, and we couldn't even hug



people!” At least I can abandon the walking in the snow, five miles to school story!

Technology is like that, and it is important to embrace the changes that come at us in the same way.

Recently my CEO came to me and said, “Cash, we need to look at more automation on the property.” To which I answered, **“MY SOLE PURPOSE IS TO DO WHATEVER YOU TELL ME TO, DRILL SARGEANT!”**

My reference to Forrest Gump is fun for both of us. What do I do? I happily look at automation, I enthusiastically research and build plans, I blissfully create technology roadmaps that completely alter the infrastructure that I painstakingly built, to create a different path. Why so happy and enthusiastic? Because I know that it is just one more event, and tomorrow I will embrace another change that will alter all my strategies from the day before.

On top of the new and ever-changing strategies, I am constantly chasing the end-of-life cycle that we all chase. Once I upgrade my SQL database to be safe for another two years, I am hit with my VMWare being end-of-life or end-of-support, then it is the wireless infrastructure, or the VOIP phone system, or the hotel system, or the gaming system and so on. There is never a platform to land on in technology; there is an endless string of events that make you feel like the Little Dutch Boy with his fingers in the dam.

This is the fabric of technology and innovation; you learn to embrace the constant change and realize that we are all just running from one string of events to another. This is both in our lives and in our careers, but it is something that should be seen as a positive thing. Once you realize that this train doesn't stop, you can stop trying to jump off it on to a platform that doesn't exist. You can look at the world with a more relaxed view because you

know that events and things will continue to happen, and you don't have to seek the end of something. Instead, you can enjoy where you are now, where we all are now. It's really all we have anyway. Besides, who doesn't want to live in a world that isn't filled with a few surprises? Okay, fewer surprises would be nice from time to time, but the universe doesn't seem to work that way!

None of us are super-human, especially not me. Anyone who knows me can attest to this! Everyone needs to take a break from the treadmill occasionally, so that is why we surround ourselves with competent and caring family, friends, managers and directors and let them share some of the load. In my case, as things change for me personally, professionally, and every way imaginable, I offer them as much support as I can to reduce their burden, knowing that when I am at wits end and need a break, they will do the same for me.

**I Bring Up Other People For A Reason – An Extremely Good Reason**

The only way you will ever survive your personal and professional endless chain of events is to embrace the people you have in your life. I have a few great friends that always support me personally, and I have the entire G&L family and co-workers, both past and present, who support me professionally. Sometimes personally as well! When I feel I am off base on anything, I reach out and they will set me right. Often, I find that they have that same question, or same idea, and for some odd reason are always willing to help me. It seemed strange to me at first, but then I heard this story.

There were a man and woman who were dating, and the woman often came to the man's house to help him clean his home. His house was always pretty messy, and sometimes

the mess was too much for both of them to handle, so it would become an all-day project that ended in frustration. One day he got curious, and he asked her, “Why are you helping me clean my home? Yours is just as messy as mine.” She smiled and said, “Because when I clean my home, I'm just cleaning my home. When I clean your home, I'm helping you clean your home.” Then she smiled, “And besides when the mess is too big for both of us, it is just nice to have the company.”

Sometimes when I am dealing with all the odd destinations of my life, and all the odd changes in my world, professionally and personally, I think of that story. People love to be a part of another person's success and are usually eager to help you out, especially after you've supported them a time or two. It is that universal law of balance that we all have running in us internally. We all want to feel like we can provide value to someone else, and even if we can't help... well it sure is nice to have some company.

*John Cash Filipppe is an accomplished Casino Executive with over 20 years of Casino IT experience. He has worked nationally and internationally for several properties, and across many types of gaming from commercial, tribal, and riverboat entertainment facilities. He was a vendor with Bally Gaming and Systems in the late 90's and worked with the large expansion of tribal gaming during that time. His unique style of IT management was featured in the book “The Tech Buzzkill: How Top IT Leaders Fend Off the Tech “Buzz” to Focus on the Business” by Gerry Robinson and Manish Sharma. He is currently the Executive Director of MIS for Quinault Beach Resort and Casino in Washington state.*

**20<sup>TH</sup> ANNIVERSARY**



“THE G&L COMMUNITY CONTINUES TO BE A GREAT SOURCE OF INFORMATION SHARING AND COLLABORATION. THE G&L ROUNDTABLE SETS THE STAGE FOR RELATIONSHIP BUILDING, IDEA GENERATION, AND OPEN DIALOG; HOWEVER, IT'S NOT JUST LIMITED TO A ONCE A YEAR EVENT. THE FRIENDSHIPS BUILT AMONGST THE INDUSTRY'S TOP TALENTS EXTEND THROUGHOUT THE YEAR. I'M THANKFUL TO MY COLLEAGUES WHO ARE ALWAYS OPEN TO SHARING IDEAS. IN ADDITION, GAMING & LEISURE CONTINUES TO BE THE BEST PUBLICATION OUR INDUSTRY HAS TO OFFER. ITS AWARD-WINNING DESIGN COUPLED WITH INSIGHTFUL AND RELEVANT CONTENT MAKE IT THE MUST-READ MAGAZINE THAT CROSSES MY DESK. CONGRATULATIONS TO G&L FOR MANY FABULOUS YEARS COVERING THE GAMING AND HOSPITALITY INDUSTRIES.”

BRIAN CHARETTE, VP OF IT, FOXWOODS RESORT CASINO

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# WHAT'S NEXT AND WHAT'S NEW? A HODGEPODGE OF THOUGHTS & QUESTIONS



As I write this article, I find there is a lot on my mind. Spring has sprung and it seemed a good time to ponder the future a bit. It is starting to look like the whole world will soon be open for business. It feels like being awakened

from an extremely long period of hibernation. The world changed a lot during this forced hiatus, and like it or not, we have all been forced to live in a world with more questions than answers. I find myself rethinking old ideas as well as pondering many new changes that seem to be hurtling toward us at a rapid rate.

## Social & Political Issues

How will the social and political issues affect us as we move forward?

What does the process of bringing workers back to the office look like? Recent news reports indicate a surge in hiring is taking place but there are not enough workers to fill the need. I guess this is a welcome change. I wonder if large portions of our work force got used to not working during the lock down and have simply decided to opt out permanently? If so, how does that work long term?

The need to get people back to work is particularly true for the hospitality service industry, and it seems finding people is more problematic than ever. I never expected to see labor shortages as we started to re-open, but my inbox is filled with recruitment ads.

Will companies invest more on programs to promote healthy lifestyles after the impact COVID had on so many with underlying conditions? Will masks remain a mainstay for some people? Will banks and casinos etc. allow them in the future? Will vaccines be required to participate in various activities, travel, and work? Will HIPPA laws and company policies need to change if proof of vaccines becomes a requirement for participating in events?

What will the long-term impact of the current border crisis be on our communities and the country overall? The news stories are heartbreaking and border control agents are now the new essential front-line heroes of the day as they try to deal with all the children and desperate people they see every day. The right answers seem elusive for both refugees and dreamers. What is fair versus humanitarian are at odds in this debate.

What is the long-term impact on the millions of school children who basically missed an entire year of school? When will schools finally open? Will parents have more options to choose where they want their kids to go to schools in the future? There is a growing movement to fund K-to-12 education directly to the families instead of to the schools directly. The hope is that this would provide more school choice and remake the education system to be more effective.

Many corporations and businesses have started to take very vocal political stands – a position they mostly avoided throughout my career to date. Navigating those waters has led to some interesting hypocritical disclosures as they often have picked sides without consistency. It seems they are sometimes only choosing when it does not come at too big of a cost to their bottom line or personal privileges. Often times good intentions have had unintended consequences.

Many consumers and investors are increasingly concerned about the political and social policies of the companies they choose to do business with. The impact on our environment and how they treat mother earth are at the forefront of their decision-making. They also care about how profits are used and what additional good is created when they buy from you.

Many political leaders, and so-called experts, have also fallen victim to their own privilege. One-time heroes have been outed for their inconsistent behavior, expecting the public to do what they say and not what they do! It has made it much harder to decide who to trust these days.

## The Digital Economy, Energy Policy & Technology Advancements

It has been said that the pandemic moved the adoption of the digital economy forward five years faster than normal adoption would have taken place. Development of these types of solutions seems to be everywhere.

Software as a Service (SaaS) was a new trend over a decade ago. Now it seems there is a rush to create as many “as a service” options as possible. It is definitely becoming a new business model.

Will Transportation as a Service (TaaS) become a reality? Will you not need to own a car in the future? Or if you do, can you lend

Self-reliance, thinking for ourselves, and deciding each situation on its own merits seems to be the only answer for now. What works on one day may not be the answer the next. Things are moving way too fast for a one-size-fits-all decision.



# 20<sup>TH</sup> ANNIVERSARY



"OVER THE LAST 13 YEARS, I HAVE BEEN PARTICIPATING IN THE GAMING & LEISURE ROUNDTABLE AND HAVE FHAPPY 20TH ANNIVERSARY G&L!!! WHAT A CRAZY YEAR TO CELEBRATE A PLATINUM ANNIVERSARY. NOT BEING TOGETHER THIS YEAR WAS DISAPPOINTING, BUT THE SPIRIT OF US ALL WERE THERE WITH HIGH HOPES AND ENERGY. JEANNIE, YOU NOT ONLY CREATED AN INTERSTELLAR FORUM FOR THE IT COMMUNITY, BUT YOU HAVE FORMED A FAMILY OF FRIENDSHIPS THAT WILL LAST FOR MANY YEARS TO COME. I THANK YOU AND YOUR TEAM FOR ALL THE HARD WORK THAT HAS BEEN PUT INTO THIS FORUM AND LOOKING FORWARD TO MANY MORE YEARS OF SUPPORT FROM ALL OUR PEERS."

GEORGE CVEK JR., VP OF IT, THUNDER VALLEY CASINO RESORT



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it out on the network when not needed? Can you turn it into a profit center instead of a cost? Can cities be converted to the urban oasis envisioned by promoters of such ideas?

What kind of energy will be needed to fuel all those batteries in all the new EV cars coming out? Will affordable free energy devices become readily available in the next ten years? I have seen several examples of promising technologies that are in use in limited environments today. Such technology has supposedly been around since Nicolai Tesla's days, but various oil industry tycoons have always suppressed by. Perhaps those days are finally over.

Will Zoom and other technologies enable remote work to continue for many to work from anywhere? Will the flight to small towns and the country continue? What will cities do to re-invent themselves?

While we all miss the human contact and engagement of in-person meetings, there have been many benefits of working from home. No one missed the long commutes, traffic jams and related stress. We all noticed and loved the clearer skies as well.

HaaS (healthcare as a service) is just the latest trend that is being touted. Not just the digitizing of our records that has already taken place, but actual individualized specific treatments based on our personal genetic makeup.

What other digital technologies will be mainstream in the coming decade? Which jobs will be replaced by digital contracts? The crypto decentralized block chain is not just for crypto but is a new process that can change the way we all do business in general. Everyone can own a piece of something or a service and get paid whenever it is used.

In what ways would the hospitality industry be impacted? Especially when a good part of what we offer is human connection at the service level that is a major part of the experience that our customers remember and have come to expect and value.

At least for most gaming companies the dream of a full-360 digital view of the customer remains elusive. But I know of several operations that seem ready to take on this challenge. I look forward to seeing how this evolves.

If you check out Thriveon.com you will find information on all kinds of new technology and devices to make the world a better place. It is a nice place for positive thoughtful ideas that at least makes me feel better amid all the continual chaos, division, and confusion.

## Crypto Currency

Crypto was the subject of a discussion on the New Normal with Victor Rocha – via Zoom of course. The panel members indicated that customers were starting to ask when casinos would accept crypto?

Panel members had a short, but enlightening discussion on the future of crypto and how businesses could adjust to this new form of currency? Which of the coins will become widely accepted?

What is the impact of China creating its own crypto currency? How will KYC (know your customer) rules be adapted for crypto? What new money laundering concerns are created? Time will only tell.

They also shared that there is a new Visa card that is funded with crypto generally available today. You cannot tell it apart from any other visa card. Customers can use that to basically convert crypto to cash when using it to make cash advances.

The panel also announced a new organization that has been created called Tribal Affairs Task Force. The idea is to provide Tribal Casinos and Tribal management executives with access to highly experienced task force of professionals for legal and investigative services that are difficult to afford or find on an individual basis.

Such services would include fraud, theft, and other criminal activity, such as money laundering investigations, as well as AML (anti-money laundering) and other regulatory assistance. They could also make sure that tribes got their fair share of any legal settlements, like the recent opioid case with McKenzie, where their sovereign nations people were victimized as well.

## On a Personal note – I'm Ready to Travel!

As an avid traveler this shutdown has been a bit trying for me. I did fit in the odd car trip here and there, but I have missed a true destination vacation.

My new passport arrived, and I am ready to go. I have started to look at the many eco-friendly hotels and resorts that have popped up in the last few years, many of them in unique and wonderful natural settings. Some hoteliers have found creative and unique ways to provide exceptional experiences while protecting our environment.

As I ponder my options, I have realized that our Earth is the ultimate host to all of us. We live here at her leisure and whether at home or abroad it's good to remember to be a good guest!

Happy Travels!

*Ms. Hawkins is a Sr. Executive Level Business Strategist with more than 30 years of experience in the hospitality and software industries. After starting her career as a CPA, she held a variety of senior positions, such as CFO, CIO, and Sr. VP of development, for major gaming companies. She was also VP of global hospitality sales for Infinium/Infor for 10 years where she established and led the Hospitality vertical and developed multiple industry best practices in the design and implementation of back office ERP solutions. Transforming today's businesses into Intelligent Enterprises is her passion.*

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# ANTITRUST ENFORCEMENT IN THE BIDEN ADMINISTRATION: FIVE THINGS TO WATCH



Antitrust continues to be hot news, as the Biden administration appears poised to significantly enhance antitrust enforcement over the next four years. Although the headlines focus on increased antitrust scrutiny of “big tech,” the latest trends and prospective developments cut across all industries—including gaming, leisure, and hospitality. Here are five antitrust-enforcement trends and areas to watch.

## 1. New Agency Leadership

At the Federal Trade Commission (FTC)—which is one of the two federal agencies that enforces the antitrust laws and leads enforcement on most antitrust issues in the gaming and leisure industry—new leadership

is still pending.

Under former-President Trump, there were three Republicans and two Democrats on the Commission. With the change in control of the White House, President Biden can designate the Chair of the FTC and nominate—subject to Senate confirmation—Commissioners of his own party to fill open seats and replace Commissioners with expired terms, such that up to three of the five FTC seats are held by Democrats.

In January, the Republican Chair of the FTC stepped down and President Biden tapped Democratic Commissioner Rebecca Slaughter to serve as Acting Chair. Biden nominated the other Democrat on the Commission, Rohit Chopra, to chair another agency, but Chopra remains at the FTC for now.

Perhaps most notably, the President nominated Lina Khan, a fierce critic of “big tech” who previously served as a legal advisor to Commissioner Chopra, to fill one of the Democratic seats. Her nomination is pending.

The terms of the two remaining Republican Commissioners, Noah Phillips and Christine Wilson, don’t expire until 2023 and 2025, respectively, so they should remain in place for the foreseeable future.

The President has yet to nominate a candidate for the fifth seat on the Commission. The import of that nomination to the future direction—and intensity—of FTC antitrust enforcement can’t be overstated.

Because it takes a majority of Commissioners to vote out a complaint, settle a case, or take other formal Commission actions, the third Democrat on the FTC will be a pivotal vote.

If the third Democrat is an “enforcement progressive”—like Acting Chair Slaughter and nominee Khan—the FTC could bring substantially more cases on more aggressive theories against mergers and other practices.

If, on the other hand, the nominee is a more “traditional” enforcer or a moderate, that third Democrat might temper any over-

## 20<sup>TH</sup> ANNIVERSARY



“CHEERS TO TWENTY YEARS! I WAS FORTUNATE ENOUGH TO HAVE FIRST MET JEANNIE CARUSO MORE THAN TWENTY YEARS AGO WHILE WE WERE WORKING TOGETHER ON A SHARED PROJECT BASED OUT OF MICHIGAN’S UPPER PENINSULA. IT WAS ONLY A YEAR OR SO EARLIER THAT I HAD PROCEEDED WITH MY OWN CRAZY IDEA OF FORMING WHAT WOULD BECOME TRIBALNET, WHEN I RECALL DISCUSSING WITH JEANNIE HER OWN “CRAZY” IDEA AND VISION OF CREATING “THIS NEW PUBLICATION AND GROUP THAT WOULD ENCOMPASS BUSINESS, TECHNOLOGY, INNOVATION AND ALL THINGS RELEVANT TO THE GAMING & HOSPITALITY INDUSTRY.” IT TAKES A RISK TAKER WITH VISION, COMMITMENT AND A TIRELESS WORK EFFORT TO TURN AN IDEA INTO A REALITY, AND CONGRATULATIONS TO JEANNIE AND G&L ON THE TWENTY YEARS OF SUCCESS AND ACCOMPLISHMENT. THE QUALITY OF GAMING & LEISURE CONTENT ALONG WITH THE INVOLVEMENT OF THE GAMING AND HOSPITALITY COMMUNITY IN G&L MAGAZINE IS ALSO A TESTAMENT TO THE EFFORTS AND DEDICATION OF THE G&L TEAM. I HAVE BEEN PROUD TO BE A PART OF THE G&L BOARD, AND EVEN MORE PROUD TO HAVE JEANNIE CARUSO AS A FRIEND. AS TECHNOLOGY CONTINUES TO PLAY A LARGER ROLE IN THE ULTIMATE SUCCESS OF EVERY ORGANIZATION IN OUR INDUSTRY, IT IS IMPORTANT TO HAVE RESOURCES LIKE GAMING & LEISURE AND A FORUM LIKE THE G&L ROUNDTABLE THAT FOCUSES ON TECHNOLOGY AND THE BUSINESS ISSUES WE ARE ALL CURRENTLY DEALING WITH. CONGRATULATIONS ON YOUR ACCOMPLISHMENTS AND TWENTY-YEAR ANNIVERSARY!”

MIKE DAY, FOUNDER OF TRIBALNET





# Anti-Trust Enforcement in the Biden Administration

**Focus #1: New Agency Leadership**

**Focus #2: Horizontal Merger Enforcement**

**Focus #3: Enhanced Vertical Merger Enforcement**

**Focus #4: Labor and Employment Issues Turn Criminal**

**Focus #5: Potential New Legislation**



Courtesy of iStock.com

zealous enforcement by voting with the two Republicans in certain cases.

Meanwhile, at the Department of Justice, which enforces criminal and civil antitrust law violations, the President has yet to nominate someone to lead the Antitrust Division as Assistant Attorney General (AAG). Recent reports indicate that it's been difficult to find a nominee that will satisfy progressives' calls for the AAG to be someone who hasn't represented any "big tech" firms or whose law firm hasn't either.

At the DOJ, too, which end of the Democratic-enforcement spectrum the nominee sits could have significant implications for the intensity of antitrust enforcement over the next four years.

**Takeaway:** As the saying goes, personnel is policy, so watch how these nominations—and the requisite Senate confirmations—shake out. They are likely to say a lot about how

strongly the antitrust-enforcement winds will blow.

## 2. Horizontal Merger Enforcement

A core component of the FTC and DOJ's antitrust-enforcement portfolio is investigating and bringing enforcement actions against anticompetitive "horizontal" mergers, meaning mergers involving companies that compete with one another. Over the last several years in particular, that enforcement portfolio has included casino and gaming mergers.

Since 2013, the FTC has sued to block the Pinnacle/Ameristar merger (later settled with divestitures); sued to block the Draft-Kings/FanDuel merger, which was later abandoned; caused Churchill Downs to abandon its planned acquisition of a casino from Eldorado; and required divestitures as a condition of clearing the Penn National/Pinnacle and Eldorado/Caesars mergers.

Although conventional wisdom would suggest that Republican leadership of the FTC and DOJ under President Trump might have moderated the agencies' merger enforcement as compared to President Obama, the FTC dispelled that notion. In the last year, the FTC had its most active year in merger enforcement in two decades. The agency filed seven complaints challenging mergers; entered 10 settlements conditioning merger approvals; caused 11 transactions to be abandoned or restructured; obtained the largest divestiture (by value) in history; challenged consummated mergers; and raised a notable variety of uncommon (albeit not unprecedented) theories in merger cases.

With the FTC and DOJ likely to be led by even more aggressive enforcers, there will be an even hotter spotlight on mergers that might eliminate current, nascent, or future competition between the merging parties. Enforcers are also likely to be more rigorous in

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STEVE EDWARDS, IT DIRECTOR, JACOBS ENTERTAINMENT



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evaluating divestiture proposals and proposed divestiture-buyers to resolve their merger concerns.

**Takeaway:** This hotter horizontal-merger spotlight means that parties contemplating mergers need to conduct earlier and more thorough antitrust diligence to evaluate the potential antitrust risks of a transaction. It also means that parties will likely need to build in additional time—and cost—to close their deal, to account for longer, more rigorous agency investigation of the effects of the deal and the sufficiency of any proposed remedy.

### 3. Enhanced Vertical Merger Enforcement

Antitrust enforcement with respect to vertical mergers—i.e., mergers of firms at different levels of the supply chain, such as suppliers and customers—is also poised to intensify under the Biden Administration.

The antitrust agencies have long investigated and, not uncommonly, imposed remedies as a condition of clearing such mergers. But for decades, the agencies had not litigated a vertical merger challenge in court, until the DOJ's bid to stop AT&T's acquisition of Time Warner in 2017—which failed.

After that loss, the agencies revised long-outdated guidelines on "non-horizontal" mergers, promulgating new Vertical Merger Guidelines in June 2020. These Vertical Merger Guidelines largely reflect current agency practice, rather than breaking new ground.

Then-Commissioner (now Acting Chair) Slaughter and Commissioner Chopra voted against issuing these new Vertical Merger Guidelines. Slaughter said the new Guidelines overstated the potential benefits of vertical

integration and understated the ways in which such mergers could harm competition.

Under the prior Republican-controlled FTC, Slaughter and Chopra dissented from multiple agency consent orders that accepted "behavioral" (non-divestiture) remedies to clear vertical mergers, stating that the remedies didn't suffice—meaning that they would have wanted a divestiture or to file suit in court to block the merger outright.

Now, as Acting Chair, Slaughter has said that the new Vertical Merger Guidelines should be withdrawn and replaced. More tellingly, in March, the FTC filed its first complaint in decades challenging a vertical merger in court. The FTC's suit to block the Illumina/GRAIL transaction not only represents a challenge to a vertical merger, but also alleges harm in a market (multi-cancer early detection tests) for which neither GRAIL nor any other company has yet to actually launch its product on the market.

While the FTC still has to prove its case in court, the case was unanimously voted out 4-0 in bi-partisan fashion by both Democrats and Republicans at the FTC, and shows that the agency is poised to significantly ramp up vertical merger enforcement.

**Takeaway:** For the gaming and leisure industry, the FTC's more aggressive approach to vertical mergers means, for example, that a casino operator looking to acquire a vendor or other partner—perhaps a sportsbook operator or an online gaming provider—may face greater FTC scrutiny. Companies contemplating such mergers should assess whether their merger partner supplies products to (or buys products from) a competitor to the company, and whether the company and its merger

partner have a significant market share in any market. If so, additional antitrust diligence is advisable.

### 4. Labor and Employment Issues Turn Criminal

Since 2016, when the agencies released joint Antitrust Guidance for Human Resources Professionals<sup>1</sup> the DOJ has warned that it would begin charging anticompetitive restraints on employee hiring and compensation as criminal—not civil—violations. The DOJ is now fulfilling that promise.

In December 2020, the DOJ filed its first criminal charges alleging a labor-related antitrust violation. The DOJ obtained a criminal grand jury indictment of the owner of a home health staffing company. The indicted owner allegedly agreed with the owner of competing home health staffing agency on the rates that they would each pay therapists. The DOJ alleges that the agreement amounts to per se unlawful price fixing of wages.

Then in January, the DOJ obtained a grand jury criminal indictment of two affiliated healthcare companies that allegedly agreed with competing healthcare providers not to solicit each other's senior executives. The DOJ alleges that the agreement represents a per se unlawful market-allocation conspiracy that suppressed competition to hire senior-level employees.

**Takeaway:** With the DOJ now charging competitor agreements related to hiring, soliciting, and compensating employees as criminal antitrust violations, the stakes are even higher for companies to avoid even the appearance of such agreements. Senior executives, HR staff, and other company employees involved in re-



crucial, hiring, and compensation decisions must carefully avoid such agreements with other employers. Additionally, ongoing antitrust training for company employees, and implementing a robust and effective company antitrust-compliance policy, is critical.

### 5. Potential New Legislation

Finally, Congress may give the antitrust agencies more tools and resources to increase antitrust enforcement. Maybe.

In February, Senator Amy Klobuchar, who now chairs the Senate Subcommittee on Antitrust, Competition Policy and Consumer Rights, introduced sweeping legislation that would arguably represent the most dramatic change to antitrust law in a century.

Klobuchar's bill would make it easier for the agencies to block mergers. Among other things, her bill would lower the legal standard for the agencies to prove that a merger is unlawful in court and, in some cases, instead of the government carrying the burden to prove that a merger is unlawful, the burden would flip onto the merging parties to prove the merger isn't unlawful. This burden shift would apply in three types of mergers: (1) mergers that significantly increase market concentration, (2) where a firm with a market share over 50% acquires a competitor, or (3) in "mega-mergers" valued over \$5 billion.

Klobuchar's bill would also make it easier for the agencies to clamp down on anticompetitive conduct. The bill would, for example, prohibit exclusionary conduct

that presents an "appreciable risk of harming competition"; shift the burden of proof to a defendant with a market share over 50%; and allow the antitrust agencies to seek substantial civil penalties—up to 15% of a defendant's U.S. revenue or 30% of the defendant's U.S. revenue in the specific market harmed by the antitrust violation.

On the House side, Antitrust Subcommittee Chair David Cicilline plans to introduce a series of bills that would likely, collectively, go as far, or even farther, than Klobuchar's bill.

Often, Republican Members of Congress might be expected to oppose these Democrats' efforts. But a number of Republicans appear open to significant antitrust-law changes, especially to go after big tech firms, which they allege tilt their online content moderation policies against conservative voices. At the very least, there appears to be a bi-partisan consensus that the agencies need more funding to fulfill the growing calls for greater antitrust enforcement.

**Takeaway:** While the tech industry may be the motivation for much of lawmakers' interest in legislation that would ramp up antitrust enforcement, if any of these bills becomes law, the impact will be felt across industries beyond tech. Of course, while the filibuster remains in the Senate, there are likely to be limits to how sweeping antitrust legislation can be and still pass both chambers of Congress.

### Conclusion

The FTC and DOJ under the Biden Administration are likely to ramp up antitrust enforcement for the next four years. How much so is a question that will be determined by forthcoming agency-leadership appointments, courts' acceptance of the agencies' more assertive theories of harm, and whether Congress arms the agencies with additional tools and resources. With antitrust likely to remain a hot topic, companies in the gaming, leisure, and hospitality industries should stay attuned to potential antitrust issues in their business conduct and in transaction planning.

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*Angel Prado is a Counsel in Crowell & Moring's Antitrust Group in Los Angeles, CA. Prior to joining the firm, Angel was an attorney at the FTC Bureau of Competition, where he investigated proposed mergers and challenged those deemed anticompetitive.*

### Sources:

1 DOJ-FTC Antitrust Guidance for Human Resources Professionals, at <https://www.justice.gov/atr/file/903511/download>.

## Senator Klobuchar Introduces Sweeping Bill to Promote Competition and Improve Antitrust Enforcement

February 4, 2021

WASHINGTON – U.S. Senator Amy Klobuchar (D-MN), the lead Democrat on the Judiciary Subcommittee on Antitrust, Competition Policy and Consumer Rights, introduced sweeping new legislation today to reinvigorate America's antitrust laws and restore competition to American markets. The *Competition and Antitrust Law Enforcement Reform Act* will give federal enforcers the resources they need to do their jobs, strengthen prohibitions on anticompetitive conduct and mergers, and make additional reforms to improve enforcement.

**"Competition and effective antitrust enforcement are critical to protecting workers and consumers, spurring innovation, and promoting economic equity. While the United States once had some of the most effective antitrust laws in the world, our economy today faces a massive competition problem. We can no longer sweep this issue under the rug and hope our existing laws are adequate,"** said Senator Klobuchar. **"The Competition and Antitrust Law Enforcement Reform Act is the first step to overhauling and modernizing our laws so we can effectively promote competition and protect American consumers."**

Source: <https://www.klobuchar.senate.gov/public/index.cfm/2021/2/senator-klobuchar-introduces-sweeping-bill-to-promote-competition-and-improve-antitrust-enforcement>

# DATA PROTECTION FOR GAMING AND LEISURE



The pace of data growth continues to increase across all industries. IDC projects a Compounded Annual Growth Rate (CAGR) of data created at over 23% through 2025. For data that ends up being stored, they project a CAGR of over 19%. Perhaps the only thing in the Gaming and Leisure industries growing faster than data is, unfortunately, cyberattacks. This growth of data and the increased value of data – to both businesses and criminals – have created the mandate for effective Data Protection. Darktrace CEO Nicole Eagan revealed that a 2017 data theft of a casino's player data was orchestrated via a fish tank thermostat that was connected to the internet. When our industry's new "Oceans 11" heist is data sucked out of our networks via fish tanks, we realize our data protection task is extremely difficult. It would take all of the pages of this quarter's magazine to list the breaches over the past two years in the casino and hospitality industries. We do not lack for scary stories; we understand our call to action.

## Gaming Evolves and Data Evolves

The pandemic has accelerated our digitization of customer experiences. As we move to more contactless and cashless capabilities, each of those touchpoints generates data about the customer and the transaction that might help improve profiles and develop tactics for improving customer experience.

Beyond transactions, sensors across our landscapes are now checking for safety signals such as fevers, spacing, crowding, and when areas need to be cleaned (among other use cases). Those sensors generate large volumes of data.

In addition to the new digital touchpoints and the safety-related scanning data, the very business model of gaming is evolving to cater better to younger customers. Successful casinos will need to make gaming more engaging for younger customers as well as shape the non-gaming offerings into more meaningful experiences. Consider this observation by Jeff Hwang of Motley Fool, "The simple fact is that Millennials are smarter, more experienced, and more knowledgeable about gambling and gaming strategy than any generations to come before us."

Studies have revealed that the customer profile for casinos is trending younger and, with that, the number of those patrons who gamble is declining. New strategies for engaging younger generations will likely be based upon data collected that can yield specific insights into customers. The customer is king, and as that group of customers trends younger with new tastes, delivering the best experience will be the successful differentiator. Increasing food and beverage revenue is one avenue, but the truly successful casinos may need to tweak their casino floor to appeal to the digitally savvy new customers (without losing any of the existing customer base). All of this will require valuable data on patrons and on real-time revenue and profit streams to guide the gradual evolutionary shift.

## The Growing Value of Data

The value of data to gaming and leisure organizations will continue to increase. Correspondingly the amount of data generated, stored, processed, and managed will continue to increase. That very same data is valuable to criminals as well. Protecting, governing, and securing the data is a non-optional business

## 20<sup>TH</sup> ANNIVERSARY



"HAVING BEEN AN IT PROFESSIONAL FOR MANY YEARS, I HAVE BEEN EXPOSED TO MANY TRADE ORGANIZATIONS, CONFERENCES, SHOWS, AND ORGANIZATIONS. GAMING & LEISURE IS ABSOLUTELY THE BEST ORGANIZATION I HAVE EVER WORKED WITH IN MY LIFE. WHEN I THINK OF ALL THAT JEANNIE THROUGH G&L HAS ACCOMPLISHED FOR OUR INDUSTRY FOR ALL OF US—IT BLOWS MY MIND."

TONY DELEON (RIP), PRESIDENT, PLAYERSOFT TECHNOLOGIES  
VISIT [PLAYERSOFT.COM](http://PLAYERSOFT.COM)



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requirement. The focus of this article is on “data protection” and more specifically, on building a solid foundation for data protection. Cybersecurity and data regulation compliance are also critical success factors for any enterprise, but the scope of those two areas alone is daunting enough to induce organizational paralysis on what to do first. Building a great data protection foundation is vital for effective cybersecurity and data compliance programs.

In the end, the common goal of the data protection program, the cybersecurity program, and the compliance program is to ensure the confidentiality, integrity, and availability of enterprise data.

### Data Protection Foundation

#### 1. Categorization for a Policy-Based Approach

Categorization of types of data will build a capability where protection, security, and compliance requirements can be built into the processes and technology. Knowing if a collection of data contains company confidential information, sensitive information, HIPAA-related information, or personally identifiable information will enable proper policies and administration for backup/recovery, access

controls, and data obfuscation.

Technology tools and utilities can be more easily implemented and administered using a policy-based approach. Additionally, categorization can inform data management choices such as where/how to store the data and when/how it needs to be available for processing or inquiry.

#### 2. Data Backup and Recovery

Perhaps the most fundamental requirement for data protection is to be able to confidently restore damaged, lost, or corrupted data. Unfortunately, the growth in the volume of data, the expansion of a variety of data (structured, unstructured, video, audio, pictures, etc.), and the fragmentation into data silos has stressed legacy backup/recovery platforms to the point of breaking.

Legacy backup and recovery platforms needed to be reinvented to handle the growing volumes and complexity of today’s data realities. Significant investments in research and development by incumbent vendors and technology venture capital have created a new set of platforms that meet today’s needs for short backup windows and near instant restores. These new platforms can be managed

via policies by data categories. An accurate data category schema will drive the implementation and administration of a backup/recovery technology platform.

The modernization and automation of data protection available today will deliver instant recoveries at scale (and provide a safeguard from ransomware).

#### 3. Access Controls

An effective data protection foundation includes current, comprehensive, and centralized access controls. There are a few elements that successful access controls have:

##### Role-Based

Role-based access controls refers to restricting your users’ permissions to their roles within the business. Role-based access controls only permits users access to what is absolutely necessary to perform their job functions. The role-based approach also facilitates identity security and cybersecurity.

##### Automated Onboarding

An effective identity and access management solution will enable automated

# Data Protection Foundation

## 1. Categorization for a Policy-Based Approach

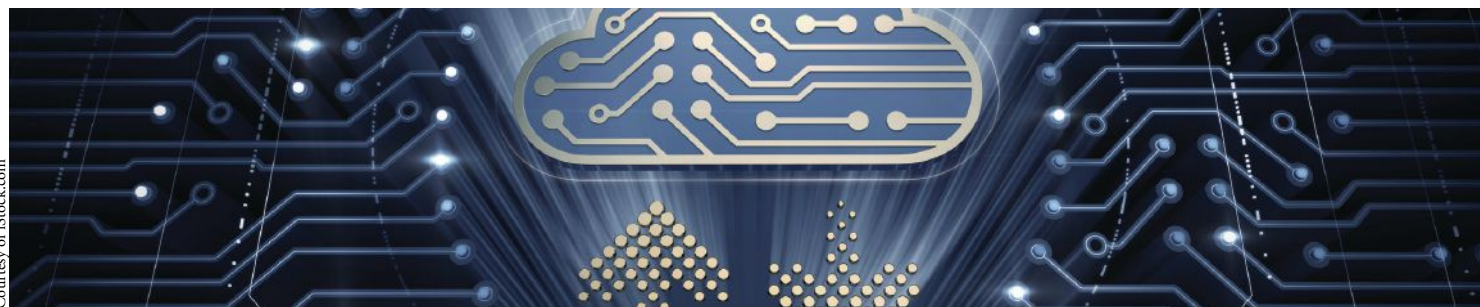
## 2. Data Backup and Recovery

## 3. Access Controls

## 4. Data Obfuscation

## 5. Onboarding Data Sources and Lifecycle Management





Courtesy of iStock.com

onboarding. This ensures that new users are automatically given the proper access controls based upon the role they will be performing. Rather than manually assigning the access rights to each application, the automation speeds the process and ensures accuracy.

### Automated Offboarding

Just like automated onboarding, doing the same for terminated/separated employees, contractors, and third parties is essential. This should also include the regular and automated scanning and discovery of orphaned accounts and removal.

### Multifactor Authentication

The best way (in today's world) to ensure proper credential use and validate the actual identity of the user is to implement multifactor authentication. It is a proven reality that passwords have been stolen (or shared inappropriately), and weak passwords can even be guessed correctly. Creating another validation layer between the access request and your company's data asset is critical.

## 4. Data Obfuscation

We are protecting against data loss or corruption with a solid backup/recovery capability. We are using effective access controls to ensure that data access is limited to the right people. The next step in data protection is to obfuscate the data. Properly obfuscated data is rendered unreadable and useless if exfiltrated by a criminal. The most obvious benefit of data obfuscation is that it hides data from those who are not authorized to see it. But there are other benefits, such as reduction in scope to meet regulatory requirements (like consumer protection acts, PCI, etc.).

Encryption, tokenization, and data masking are three common ways of efficient data obfuscation.

### Encryption

Encryption is the most secure way to hide data. Only authorized users with the encryption keys can decrypt the data. Encryption can be done for "data at rest" (stored) and "data in flight" (being transferred).

### Tokenization

Tokenization substitutes specific data with a value that is meaningless. Authorized users can link the token back to the original data. This technique is common for credit card numbers because operations can be performed on the data if the token is able to be linked to the actual data (again only by authorized users).

### Data Masking

Data masking substitutes realistic, but false, data for the original data, to ensure privacy. It is used to allow for testing, training, application development, or support activities because it provides the ability to work with the "false data" without sharing the "real" sensitive data.

Of these three types of obfuscation, encryption is reversible if you have the keys to decrypt the data; tokenization is reversible if you have the link to connect the token to the data; masking is irreversible because the actual data was changed to protect the sensitivity.

## 5. Onboarding Data Sources and Lifecycle Management

As new data sources come online in your company, the discipline of onboarding those sources into your data protection program is a critical success factor. The onboarding must include the categorization of the data source

with the proper policies defined. Once the categorization is complete, then the data source will have the assigned policies applied in the backup/recovery platform, the access control platform, and the data obfuscation platform. I want to stress the importance of assigning lifecycle management policies in the categorization process. Deciding how long data should be stored in the enterprise, if/when it should be retired, and what will be the retirement disposition (archival or deletion) are critically important policies. We know that the growth of data is increasing, and a lifecycle plan is necessary for effective data management and reasonable cost management.

### Conclusion

Future gaming and hospitality strategies that will determine the winners and losers in Gaming and Leisure will be based, in large part, on the data collected and the insights derived from that data. Enterprise data is truly an organizational asset, and the care, feeding, and protection of those assets is a business requirement. Building a solid data protection foundation will help not just in the actual protection of the data – but will also facilitate an effective compliance program and an effective cybersecurity program.

But first, be sure to check your fish tanks for data loss.

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# MASS SHOOTINGS AND THE IMPACT ON BUSINESS



There are many aspects of life that Americans miss from pre-pandemic times. Activities we took for granted, like eating in a restaurant, watching a live sports event or even our typical working lives.

However, one of the most pervasive aspects of pre-pandemic life that was not missed is mass shooting events. Gun violence was so high in the U.S. in 2019, it might be difficult to remember just how bad it was after a year in quarantine. Unfortunately, the reality of gun violence has made its way back into our headlines as many locations around the country have relaxed their lockdowns and re-opened portions of their economies and the daily activities of their citizenry.

Between March 16 and March 31, 2021, at least 20 mass shootings have occurred within the U.S. Stretched from California to Washington, DC, this string of violent encounters left 37 people dead and 89 injured in shootings that have taken place in office complexes, nightclubs, convenience stores, golf clubs, supermarkets, spas, and on a party bus. All these events, including the “storming” and eventual breach of the U.S. Capitol building on Jan. 6, 2021, have underscored the need for increased vigilance and added measures needed to survive and protect yourself against a mass casualty and violence situation.

The unfortunate part of this writing is that by the time it is published, more of these violent encounters will most likely occur throughout our country. Data shows that between 2014 and 2020, mass shooting events have increased by 64%. During those six years, the number of mass shootings have risen by 49 incidents per year on average. If 2021 continues this trend, we are looking at over 450 mass shooting events by the time we reach Dec. 31, 2021.

All locations and businesses have the potential to be the setting for gun violence. Dozens of attacks happen at companies every year, killing hundreds of people. Many of the attackers are disgruntled current or former employees, staffers’ angry relatives or rejected lovers. In one recent incident of gun violence, a Las Vegas Strip resort employee arrived at the property’s employee parking garage and killed a security guard before turning the gun on himself. The shooter, who was absent from work for a few days prior to the incident, used an employee access badge to enter the parking garage. The use of the employee badge prompted security to be notified, causing a security officer to approach and attempt to contact the shooter. When the security officer arrived at the shooter’s vehicle in a remote area on the fifth floor, the employee shot the security officer several times before turning the gun on himself. The shooter had made statements prior to the incident that he was disgruntled with how female employees at the location had treated him, and he was there to enact revenge.

It’s these types of attacks that should get business owners’ attention and convince them that they need to prepare their employees for the possibility of a mass shooting event at work. Placing the violence and trauma that comes with one of these incidents aside, mass casualty incidents that go unmitigated will cause a wide range of damage, loss, and expense for victims and impacted businesses. The economic losses can include:

- Medical costs
- Funeral expenses
- Mental health counseling
- Property damage (including repair and replacement of buildings)
- Cleanup and extra expense
- Additional security and security upgrades
- Crisis management

- Business interruption or event cancellation
- Workers’ compensation, e.g., injury, death benefits, mental health (varies state by state)
- Fines/penalties

Mass shooting incidents also lead to significant and unique litigation exposures. The businesses and people that may be targeted for liability in a mass-shooting event are varied and depend upon the circumstances, and potentially can include:

- Owners and operators of businesses or facilities where the shooting occurs
- Event promoters
- Security firms
- Law enforcement
- Parents/relatives of the shooter
- Employers
- Mental health providers
- Retailers or gun shops where the assailant acquired weapons (if acquired illegally)
- Organizations that fail to report disqualifying information to authorities
- Anyone in a position to know of and/or intervene in the shooter’s plan

Business liability insurers have also begun looking at the increasing number of mass shooting incidents and the significant claims and liability that they spawn, recognizing and addressing these types of risks have taken on greater importance. The recent MGM Las Vegas shooting settlement announced in early October 2019—\$751 million of which reportedly will be funded by insurance—puts these risks firmly in the category of exposures that companies and insurers can no longer safely ignore.

Owners have plenty of resources, starting with local police and sheriff’s departments who can visit businesses to help them prepare. Owners can also hire consultants, many of



whom have worked in law enforcement, to talk to employees about active shooters, and even inspect the workplace to point out the safest places for shelter and escape routes. Additional steps can include the following measures that might provide for additional protection in the immediate threat of a mass-shooting incident:

**Control Access to Your Facilities**

Make sure keys and key code discipline is maintained. If you do not know how many keys or key codes exist or who has them, change them to ensure only those who need access to your business has it. Make sure your employees understand the importance of not permitting unknown persons to “tag along” through secure access points.

**Provide Active Shooter Training**

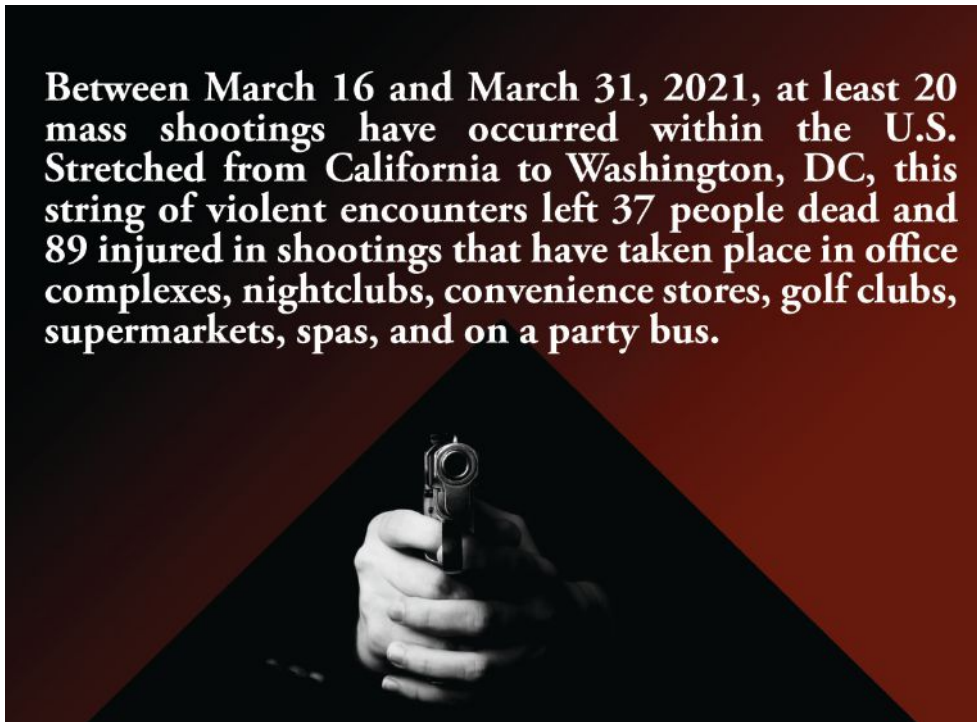
All employees should have training on how to protect themselves should gunfire erupt in the workplace. Workplace violence situations can escalate quickly – sometimes in two minutes or less. Training on what to do in those situations is the most important aspect of any workplace violence program.

**Video Cameras and Alarms Systems**

Installing visible video cameras and notices regarding security systems can be a deterrent to those considering violent behavior. It can also provide law enforcement with information needed to stop any additional incidents that may be planned.

Preparedness also includes being on the lookout for signs that employees are struggling with emotional issues that could result in violence. According to the United States Secret Service, 90% of attackers engage in some behavior prior to an attack that cause others to be concerned. Additionally, they say that in nearly two-thirds of any violent incident, more than one person had information about the incident before it occurred.

At least in cases where an employee of the business in question carries out a mass-shooting event, there are at least one or two warning signs preceding the event. Maybe the shooter in question has had multiple disagreements



with coworkers or has recently been disciplined for some form of misconduct. While it is difficult to anticipate who may or may not incite violence based on recent events, it may be possible to predict future behavior based on an employee’s past behavior.

As in the Las Vegas resort incident, a staffer who is angry and isolated could be a cause for concern. Similarly, if a staffer confides to another that they are being subjected to bullying, violence, or being threatened by someone, owners need to know.

Additionally, organizations can and should establish a “Workplace Violence Task Force” to assess and identify the risks associated with your business. It is important to ensure all levels and all departments are included in these risk assessments, as different people see different things.

Leadership should opt into a full evaluation of their worksite. What are the credentials needed to enter the worksite? How many points of access are there? What are the security measures in place to protect the employees? Not every worksite needs to have the same protective measures, but part of the evaluation would include an assessment of how likely it is for a mass shooting event to take place.

Often, owners tend to only think about active-shooter preparedness when there is a mass shooting, but as time goes by, their fears

subside, and many will not follow up and get their companies prepared. It is important for organizations to realize anything they can do in advance of a mass shooting situation is going to be 100 times better than trying to figure out a solution the moment at the time a critical situation happens for an organization.

*Robert Woolsey spent more than two decades in public safety, working as a law enforcement administrator for the last eight years of his career. As a certified law enforcement instructor, Robert has developed Continuity of Operations, Emergency Services, Incident Action, Health & Wellness, and Active Shooter Response and De-Escalation training for many major organizations throughout Nevada. Robert has a Bachelors and Masters degree in Public Administration; a Doctorate in Organizational Leadership; and is a graduate of Northwestern University’s law enforcement command school. Robert owns Silver State Consulting and has instructed a myriad of public safety courses throughout the United States and Canada to governmental and private organizations. Contact [SilverStateConsulting.net](http://SilverStateConsulting.net), [silver-stateconsulting.com](http://silver-stateconsulting.com) or 800.711.5071 with any questions.*

# PHISHY SCAMS

## A PROBLEM THAT CONTINUES TO GROW



If you're like me, you've probably seen a whole lot of phishing attempts come your way especially during the current COVID pandemic. It seems that the scammers are working overtime to trick people into things that will cost them money, security, or their identity. Most of us in the IT world can detect these scams more easily than others in our organizations, but the scams are becoming so convincing that it is becoming harder and harder to detect them with our cybersecurity tools or even with good common sense. The new generation of scammers is smart, sophisticated, and patient. These crooks are no longer made up of a few people in a Nigerian internet café on a 56k modem; they are professionals with nice workspaces, broadband connections, and they're even using analytics to determine who to attack.

I know some very smart people who have been swindled out of six-figure sums of money, so this is not something that should be taken lightly. Once upon a time it was senior citizens who were being targeted, but now everyone is a target.

Below, I have broken down some of the popular phishing scams that are being used. Many of these scams cannot be stopped by technology alone – educating your teammates is also required.

### Email Phishing

Email phishing is the most common tactic, and it has been used since the 90s. These are the emails that are sent to all email addresses that a scammer can obtain. They blast anyone and everyone, hoping a few will fall for their tricks. Many times, they will pose as a service that you use and ask that you log in. They will make everything look very convincing, but the email address that they send from is usually fake. The rule of thumb is to check the email address before clicking on a link that you're not expecting.

### Whale Phishing

Whaling is even more targeted as it focuses on the BIG fish. These attacks target the CEO, CFO, or any C-Suite executive across all industries. Many intelligent C-Level executives have been successfully phished by elaborate schemes over the last 20 years. The scammers are happy to go right to the top as they know they can score even bigger once they accomplish their task. Executives should be educated

just as well as others in your organization.

### Spear Phishing

Spear phishing targets a specific group or type of individuals such as the company's system admin or someone else who can help them get to important financial information or even passwords. Many times, the perpetrators will send a link and install a back door on the PC of an administrator, which then gives them the keys to the kingdom. From there, they can wreak havoc by stealing financial data, identities, or hijack communication when it comes to paying customers.

### Smishing

Smishing is an attack that uses our text messaging to get your attention. A message that comes into your cell phone through SMS that contains a link to click through or a phone number to call would result in a smishing attack. A likely scenario that has played out many times is an SMS that looks like it is coming from your bank that tells you that your account has been compromised and you need to call (or respond) immediately. Then the attacker asks you to verify your bank account number, SSN, etc. Then just like that the attacker has control of your bank account. Make sure to educate your team members

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about enabling 2-Factor Authentication (2FA), which will help prevent bank account takeovers and fraud.

### Vishing

Vishing is similar to all these phishing attacks, the attackers are still after the user's personal information, or sensitive corporate info. This attack is made through a voice call. Hence the "v" rather than "ph" on the name.

What has become a classic attack here is the call that has been received by so many that says they are calling from Microsoft and are worried about you because you appear to have a virus on your computer. Long story short the user turns over their credit card details to get a better version of anti-virus software installed on their computer. The attacker now has your credit card info and they have gotten you to install what is likely to be malware on your computer. The malware could contain anything from a banking trojan to a bot. The banking trojan will watch your online activity to steal more details from you, this time your bank account info, to include your password.

A bot (short for robot) is a piece of software that will do whatever the hacker wants it to do. A bot is controlled by command and control to mine for bit coins, send spam, launch an attack as part of a DDoS (distributed denial of service) attack.

### SEO Trojans

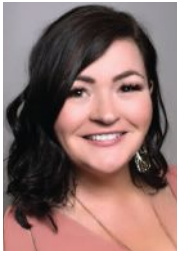
Search engine phishing, also known as SEO poisoning or SEO trojans, is where the hackers work to become the top hit on a search using google or other engines. If they are successful and can get someone to click on their link it takes them to their (hacker) website. Then when you interact with it and enter in sensitive data, they got you. The types of websites this could be is really anything – prime candidates are banks, PayPal, social media, shopping to name a few. Moral of the story is scammers are using legitimate tools and services to lure unsuspecting targets into their traps. You must teach your team to be more observant when they navigate the web. Paying attention to the destination URL is imperative for fraud prevention.

### Conclusion

As you can see, there are a lot of ways that your organization can be attacked. To stay protected, you must arm your network with great cyberthreat detection tools and consistently educate your teams about the latest and greatest scams that are being seen around the globe. Remember, just when we think we have figured out how to control these threats, new ones are being implemented.

*Christopher Swanger is a technology veteran in the gaming industry and has worked both as a vendor and an operator. He is a Go-To-Market expert who helps companies establish relevance and value within the gaming and hospitality sector. As a proponent for innovation, Chris writes for Gaming & Leisure Magazine to help tell the stories that his technology partners and colleagues deem important to the betterment of the gaming industry. You can learn more about Chris at <http://www.christopherswanger.com>.*

# THE END OF CASINO BLOCKS: RETHINK YOUR CASINO REVENUE STRATEGY FOR A TOTAL REVENUE WORLD



Casinos have a much more complex revenue picture than your typical hotel. There are rooms, a gaming floor and more on-site amenities, such as spas, shops and food and beverage outlets. With traditional gaming, alongside

sportsbooks and even eSports, these expansive properties attract diverse guest types, each with unique spending habits.

To make the most out of every inch of your property, from gaming machines to restaurants, spas and rooms, you need to optimize for total revenue. This strategy requires a bit of a rethink, as each area of your property must be stitched together into a holistic view of each guest's contribution to your property's revenue -- and ultimately, its profitability.

## Bye, Bye Blocks!

You can't optimize what you can't see. Handing over a block of rooms to casino hosts reduces visibility into a property's total revenue potential. It cloaks the opportunity cost of offering discounted rooms to players who may not be worth it or who do not qualify based on demand. The department managing these blocks is not making bad decisions; they just do not understand what is happening with the property as a whole. There are many factors that go into pricing and yielding a hotel, and when you manage your business by blocks, you can't fully leverage optimization practices. Having a forecast that is not only focused on the amount of rooms and the rate you can get on each, but also the total property spend, is a must in all resorts. A room can be booked by any segment as long as they meet the total spend criteria. This can be set by a

revenue management system or manually in your PMS.

One of the biggest mistakes witnessed in the industry is when properties manage their business segments through blocks. By taking a block of rooms out of the total revenue optimization without first considering the impact on the resort's total revenues, you leave a lot of money on the table. When a gamer is offered a room, it should be based on the property's total demand, not just a subjective view on whether the player deserves a comp or casino rate.

Let's say we have a thousand-room hotel that holds a casino block of 200 rooms. If the opportunity cost of putting a player in one of those rooms is \$200 -- as in, that room could be sold for \$200 through transient channels -- but a casino host offers up a \$50 casino rate on a room from their casino block -- are you sure

## Unoptimized Casino Blocks...

... Limit Visibility

... Affect Forecasting



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that's a profitable revenue decision? It's hard to say without knowing a player's worth and without having visibility into each guest's total potential revenue contribution. It comes down to making decisions on each customer by asking: "Hey, do they qualify for a comp if we factor in their total property contribution from a profit basis?"

## Unoptimized Casino Blocks Cause Two Other Issues

### 1. Limits visibility

A casino block artificially reduces the number of rooms optimized within the property's overall revenue management strategy. By taking 200 rooms out of a thousand-room hotel, there are only 800 rooms to optimize. It shifts the mix and creates a blind spot for total revenue management. Without visibility into those 200 rooms – who stays in these rooms, how much they spend on property and where they spend it – there's no way to realize a property's total revenue potential.

### 2. Affects forecasts

While that blind spot may not seem like a big deal, it is – and it's an issue that compounds over time due to the way revenue management relies on forecasts to optimize pricing. As demand fluctuates and bookings occur in real-time, forecasts shift. These real-time adjustments affect both your near-term pricing strategy and long-term, year-over-year projections.

Without visibility into those 200 rooms, revenue will never be fully optimized, and your property lags behind others that use data to drive total revenue. It's as if 200 rooms vanished into untraceable thin air, and you're operating an 800-room hotel! Managing a property using casino blocks impacts your performance. Under no circumstance is the initial block of rooms held the exact amount needed. A lot of times the casino uses too many, but there are times where too many were blocked and are dumped at the last minute and cannot be sold. You are at risk of missing the selling opportunity when these mismanaged rooms sit empty. Plus, the management of these blocks is manual and very time-consuming.

### Align The Incentives

Casino hosts are the people who make sure the guests are happy – but how are they incentivized? Are they encouraged to think short-term on a night-by-night basis, or are they aligned around the total lifetime

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value? Rather than blindly adding rooms for players into room blocks, let's align incentives instead for better results.

Let's say a casino host brings in a hundred-dollar player when your hotel is selling rooms for \$500 tonight, and just throws the player's room in the casino block. That's not optimization! It's a misaligned incentive that impedes revenue optimization and stymies revenue strategy – especially when

the property has the demand to fill that room with a more profitable gaming customer or transient guest.

In these large integrated resorts and casinos, you have to dig in and understand what your costs are for each segment and track guest behavior granularly across property. Does this person go to the nightclub? Do they play high-limit slots? Is this person playing golf? Are they going to see live entertainment?

Or maybe they are just a transient guest that will only spend on the room rate?

It's these on-property buying behaviors that are so critical for total revenue management. Because maybe a guest is willing to pay \$100 dollars, but then just stays in the room. All things equal, that's probably not a great decision. What if you turned away somebody willing to pay \$50 for the room but will also



# CDP

**Customer Data Platform (CDP):** a marketing-focused data layer that allows marketers to take advantage of customer data in a single spot. You can tie your customer data into your booking engine to see which customers respond to which offers. Then you can drill down even further to see how much money each of those segments contributes while on property.



spend \$500 at the casino? Or maybe you have a regular who spends \$1,000 on entertainment but nothing on gaming.

So, you can't operate on a first-come-first-serve basis and just fill up the hotel. You need to know what the expected buying behavior is going to be while they're on property to drive total contribution.

**Get Ready For A CDP**

Gaming is heavily offer driven: free dining, free room, point multiplier offers. Many offers are made across many channels: loyalty lists, snail mail, TV, billboards...all of this makes proper segmentation (and thus total revenue management) quite challenging.

To get all of this customer data in one place, there's a revolution on the horizon: the Customer Data Platform, or CDP. A CDP is a

marketing-focused data layer that allows marketers to take advantage of customer data in a single spot. You can tie your customer data into your booking engine to see which customers respond to which offers. Then you can drill down even further to see how much money each of those segments contributes while on property.

One guest may spend \$1,000 on entertainment, and another spends \$1,000 on slots. The total spend is the same, but the profit is drastically different; gaming brings more profit than food revenue. So, if the room rate is the same, you want to pick the \$1,000 gamer over the \$1,000 diner. Or you charge the guest who prefers dining out a higher room rate so that the profits are equal from the gaming side and the total contribution side. That's the kind of data that drives total revenue optimization.

By connecting your property's CRM and booking engine to the CDP, you'll be able to better understand how, where, and when guests spend money across your property. When you can correlate guest behavior to total contribution, you can optimize accordingly.

This is what success looks like: each segment fully optimized according to guest spending patterns, with relevant offers that maximize guest satisfaction without sacrificing house margin. By minimizing opportunity costs, you ensure that comp rooms and other perks are provided to guests with the most significant revenue potential.

With data at the core of your casino's revenue strategy, you'll be nimbler and more adaptable to the many ways guests spend money on property. After a tough year that continues to challenge the industry, no one can afford to leave any money on the table. Ditch the room blocks, align incentives, and build a total revenue mindset!

*Angie Dobney serves as VP, Enterprise Sales, Gaming at Cendyn. An industry veteran with more than two decades of experience in revenue management and hospitality operations, she provides insight and hands-on optimization of total resort profit to Cendyn's industry-leading gaming and hospitality clients. A recognized expert in total asset and portfolio optimization, and as enthusiastic as she is knowledgeable, Dobney is frequently tapped to speak at conferences around the globe. She continues to seek opportunities to get involved in the industry to inspire and motivate the next generation of revenue and marketing leaders.*

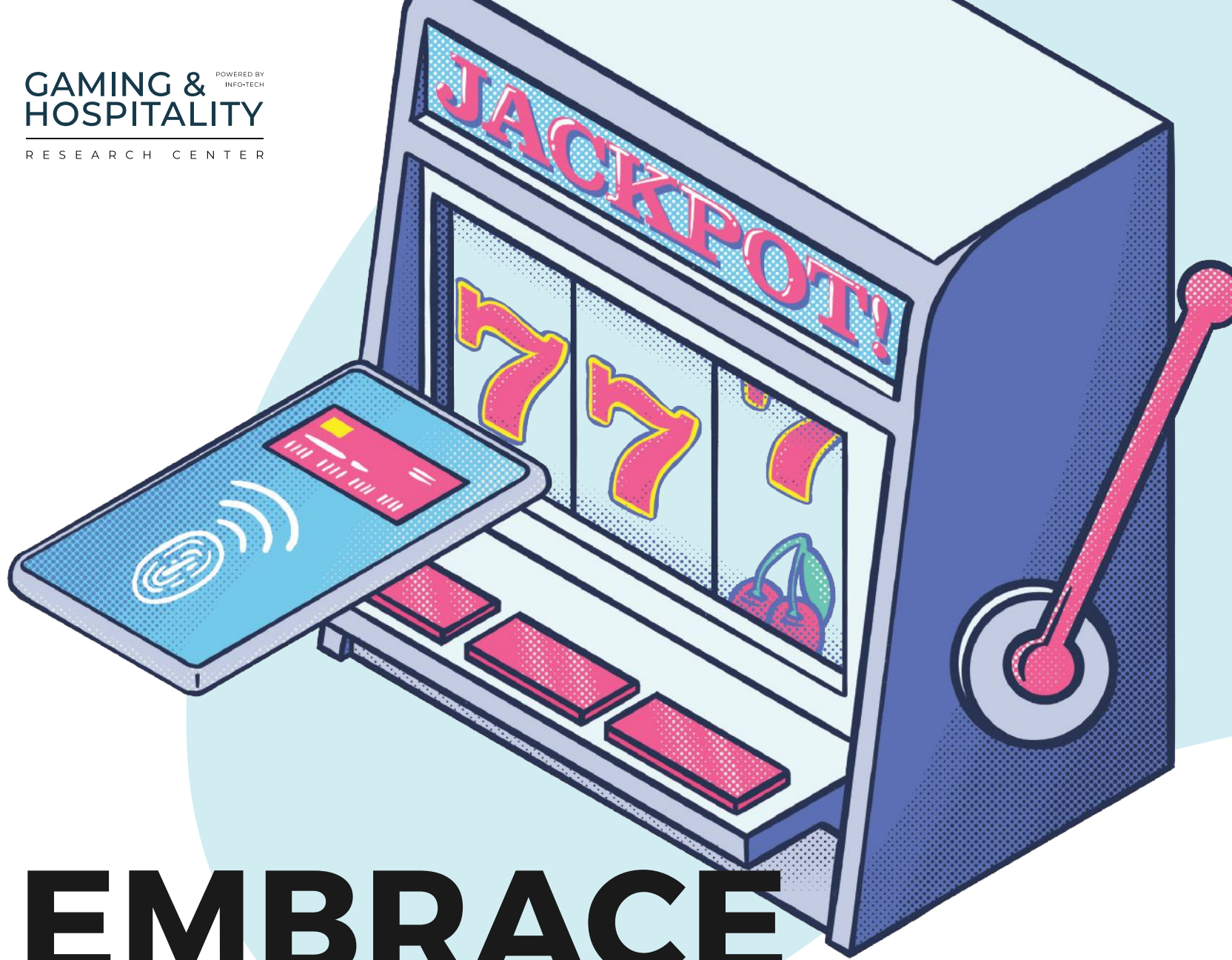
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# EMBRACE CASHLESS IN YOUR CASINO

## Preparing for the Inevitable Implementation and Adoption of a Casino Virtual Wallet

**M**aking the choice to pursue cashless should not be done half-heartedly or to simply keep up with competitor offerings. Selecting a cashless vendor is like selecting a CMS. Your property will be intertwining itself with the vendor in ways that will impact how your property operates and guests play for years to come.

Ensure you select a vendor that will support the direction your property is moving towards for the next 5 to 10 years. COVID-19 may have made cashless a more prominent component of your casino's digital,

mobile, and customer experience strategies, but that does not mean it should be rushed to completion. If anything, COVID-19 has highlighted how important this is to be implemented properly.

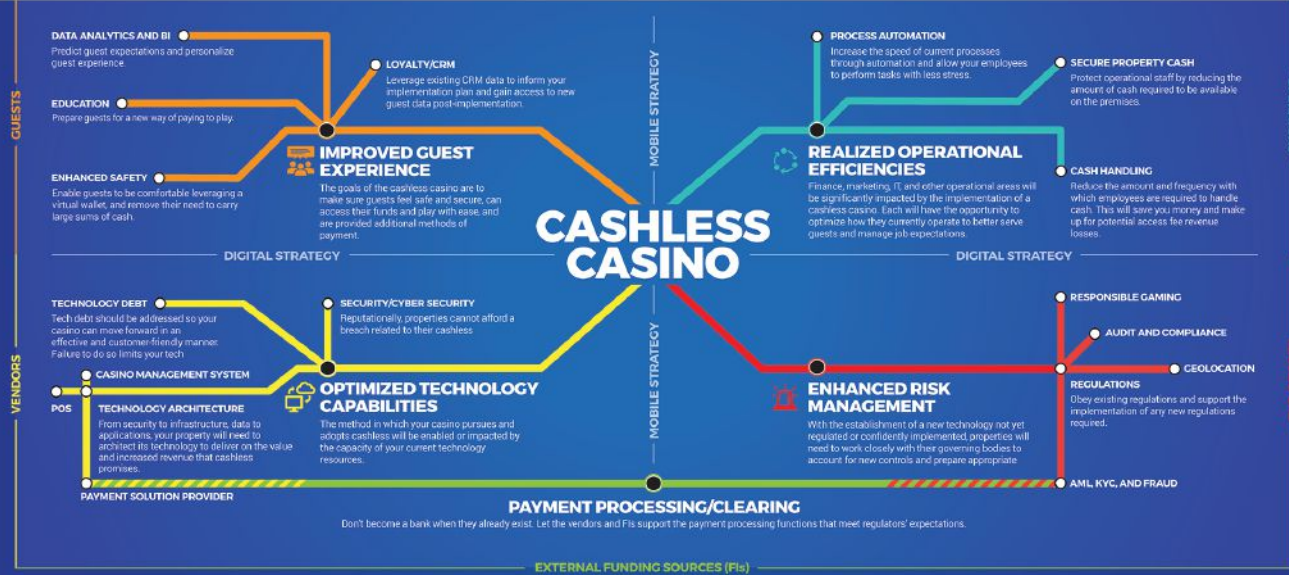
In the end though, your property will inevitably need to adopt cashless virtual wallets to stay relevant in the competitive broader hospitality and entertainment industry. Prepare for that moment by understanding how all the components and stakeholders interact.



# Embrace Cashless in Your Casino

Cashless casino is a necessary modernization initiative that is realized through the intersection of a property's mobile and digital strategies.

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72% of casino patrons are "somewhat likely" or "very likely" to use cashless payments to fund their gaming experiences (iGaming, 2020).

The U.S. gaming sector has a value of \$261.4 billion in business sales (AGA, 2018).

## \$1.5 TRILLION

The projected worth of US contactless payments by 2024

Source: Juniper Research, 2020

Casino properties have been unable to modernize their payment options for guests for several years despite the ongoing changes in society and other hospitality & entertainment industry competitors' efforts to go digital.

There has been an ongoing lack of interest by casino executive leadership to see the value in modernizing payment methods.

The types of cashless methods that exist, are approved by regulators, and are most user-friendly for easy adoption has been relatively unclear.

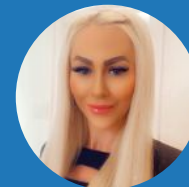
## The GHRC's approach to embracing cashless

Identify the value of a cashless casino to your organization and be able to communicate that value with leadership to gain buy-in.

Ensure your organization has considered all the potential roadblocks to going cashless and identified solutions to overcoming these obstacles.

Select a cashless casino approach that will be well received by the organization and your guests.

Contact the GHRC to get started embracing cashless today!



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Read the whole research blueprint at [go.infotech.com/cashless](https://go.infotech.com/cashless)

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# SURVEY RESULTS: WHERE REVENUE MANAGERS SPEND THEIR TIME



Even before the pandemic forced shutdowns, working only from home and Zoom-only interactions, the day-to-day of revenue managers was a bit hard for leaders to track. Many revenue managers work at the property, but their area, regional or corporate leaders work elsewhere. The analytical nature of revenue management's job can be intimidating for some, and at a minimum, difficult for stakeholders to interpret, and they spend

a lot of time alone at computers crunching numbers – out of easy view. This naturally can leave leaders wondering whether revenue managers are able to stay focused on actually managing revenue. Unfortunately, right now, they aren't – and they have probably never been fully able to.

At the end of 2020, the Hospitality Sales and Marketing Association International (HSMAI) and ZS surveyed 145 U.S. property revenue managers across hospitality and gaming to find out how they spend time across the various activities associated with their roles. Our survey respondents reported spending less than half their time on revenue generating activities (49%). The higher the title, the less time our respondents were able to spend on revenue generation. Analysts spent 62% of their time, managers 52% and directors only 48% of their time. While it is true that administrative and leadership tasks do take up more time as one advances in their career, the reality is that the more experienced the revenue professional is, the less time they are able to dedicate to the core activity that the organization pays them to do!

The study was conducted during a pandemic that has devastated the travel industry, but revenue managers had at least six months to adapt to their new reality before the study launched. Therefore, the results can't completely be written off as pandemic related. In fact, we suspect that pandemic operating conditions have only exacerbated conditions that have existed since the early days of revenue management.

In this article, we will highlight some of the key findings of the study and provide casino-specific data where possible. We will start with the split between revenue generating and non-revenue generating activities, followed by a review of time spent on yearly activities, and then weekly activities. Weekly activities are broken into non-stakeholder facing, stakeholder facing and internal administration. We will also discuss the effectiveness of revenue managers' interaction with stakeholders and their revenue management systems. Finally, throughout, we will provide key recommendations for companies that want to ensure that their revenue managers continue to stay laser focused on generating profitable revenue!

## Revenue vs. Non-Revenue Generating Activities

The top three revenue-generating activities, in terms of time spent, were responding to group requests and RFPs (21%), identifying future opportunities (11%) and analysis to uncover insights (10%). Non-revenue generating activities were highly manual, repetitive tasks like collecting data, administrative tasks like answering emails or attending department meetings, and backward looking like reviewing past hotel performance.

Casino revenue managers fared slightly better than their hospitality counterparts, with 54% of their time focused on revenue generating activities. However, like many of

their counterparts in other chain scales, they over-indexed on the time spent responding to group leads and RFPs (26%), and spent less time identifying future opportunities (9%). While groups are a very valuable, revenue-generating segment for casinos, as in all segments, the process of quoting a rate for a group is generally highly manual and can be quite inefficient. Anything that can streamline this process will allow the revenue manager to focus more attention on other segments in order to balance the overall revenue picture. As shown in Figure 2.

When it came to the non-revenue generating activities, casino revenue managers only spent 8% of their week on internal administrative tasks, but they spent a lot of weekly time reviewing and updating their forecasts or budgets (13%). Forecasts set performance expectations for upcoming periods, which is important operationally, but consider whether taking about 6.5 hours in a 50-hour work week away from revenue generation is worth the value that the organization gets from a revised performance expectation. We suspect it is not.

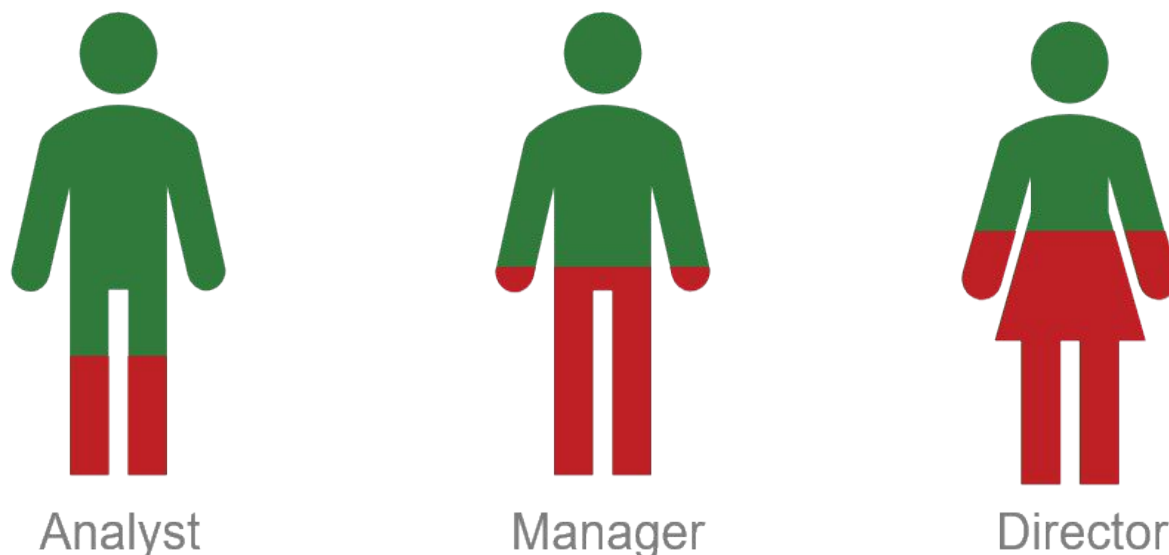
## Yearly Activities

Across all yearly activities (including things like training, conventions, visiting properties and national/regional meetings), respondents identified responding to RFPs (26 days per year) and the annual budget exercise (28 days per year) as by far the most time consuming. While responding to RFPs is revenue generating, the fact that revenue managers spend an average of 11 weeks of full-time effort on these two tasks alone is evidence of processes that are inefficient and highly manual. As shown in Figure 3.

Casino revenue managers spent 32 days responding to RFPs, and 10 days on budgets (recall that the sample size of casino RMs was



## Revenue Generating Time Decreases with Title



**Figure 1: Green for revenue generating, red for non-revenue generating. Analysts spend 62% of time on revenue generation, directors only 48%**

only 3). It appeared that a few hospitality companies were leveraging analysts for RFP response (n=5), as this role spent an average of 62 days on this activity (note that this is likely why analysts had more revenue generating time than other roles). Directors appeared to be primarily responsible for the annual budgets, as they spent far more days on this exercise (35 days, as opposed to 11 for analysts and 13 for managers). As shown in Figure 4.

Time spent on RFPs and budgets is complicated by the fact that these are cross-functional activities, and they depend on responsiveness from several departments. This does make them harder to streamline. However, we guarantee that if your team is bogged down by the manual multi-step nature of these processes, counterparts in other organizations are as well. We suggest that you meet with your counterparts in sales, marketing and operations, review these study findings and talk through these processes. It is very likely you will find opportunities to gain efficiencies that are mutually beneficial!

### **Weekly Stakeholder Facing vs. Non-Stakeholder Facing Time**

A critical component of the revenue manager's role is to guide the revenue strategy for the organization, ensuring consensus and collab-

oration. This means they need to balance their week between the time spent in identifying opportunities and building strategy, and the time spent with stakeholders informing and collaborating on strategies.

When asked how they spend time during the week, revenue managers reported that they spend about 76% of their time alone at their desks (non-stakeholder facing), 18% interacting with stakeholders and 6% on internal administration (answering emails, attending internal meetings). Casino revenue managers specifically reported spending 81% on non-stakeholder facing, 15% on stakeholder facing and 4% on internal administration. This split of activities may be appropriate for this role, provided that all this time spent is productive; the non-stakeholder facing time is focused on identifying opportunities, and the stakeholder time is focused on collaborative strategy development and execution. So, ask yourself. Is it?

Figure 5 identifies the top activities under the categories of stakeholder facing and non-stakeholder facing. While revenue managers are spending time on research (11%) and analysis (18%), they also spend about 13% on system related activities. This means that they spend about 6.5 hours in a 50-hour workweek adjusting systems: implementing price rec-

ommendations and generally maintaining the RMS, PMS, CRS, CRM and other systems. This activity feels ideal for delegation. Further, there likely could be opportunities for efficiency in the research and analysis activities as well. Too often revenue managers are forced to hunt through rows and columns of data, or to create their own data views to identify the information they seek. Consider the impact of providing "smart reporting," data views and reports that highlight important insights or actions, directing revenue managers' attention to where it is needed most.

Revenue managers reported spending 13% of their time facilitating the revenue strategy meeting, answering questions from stakeholders and meeting with their sales and marketing counterparts (6.5 hours in a 50-hour work week and equivalent to the time they spend on system interaction). Ideally, to continue to reinforce the strategic importance of this role, we would want revenue managers in front of key stakeholders as much as possible. However, revenue managers in our study reported that they seemed to spend too much time answering the same question in different data formats to different stakeholders, or reporting back routine performance information. Any effort that can be made to ensure that stakeholder facing time is productive time

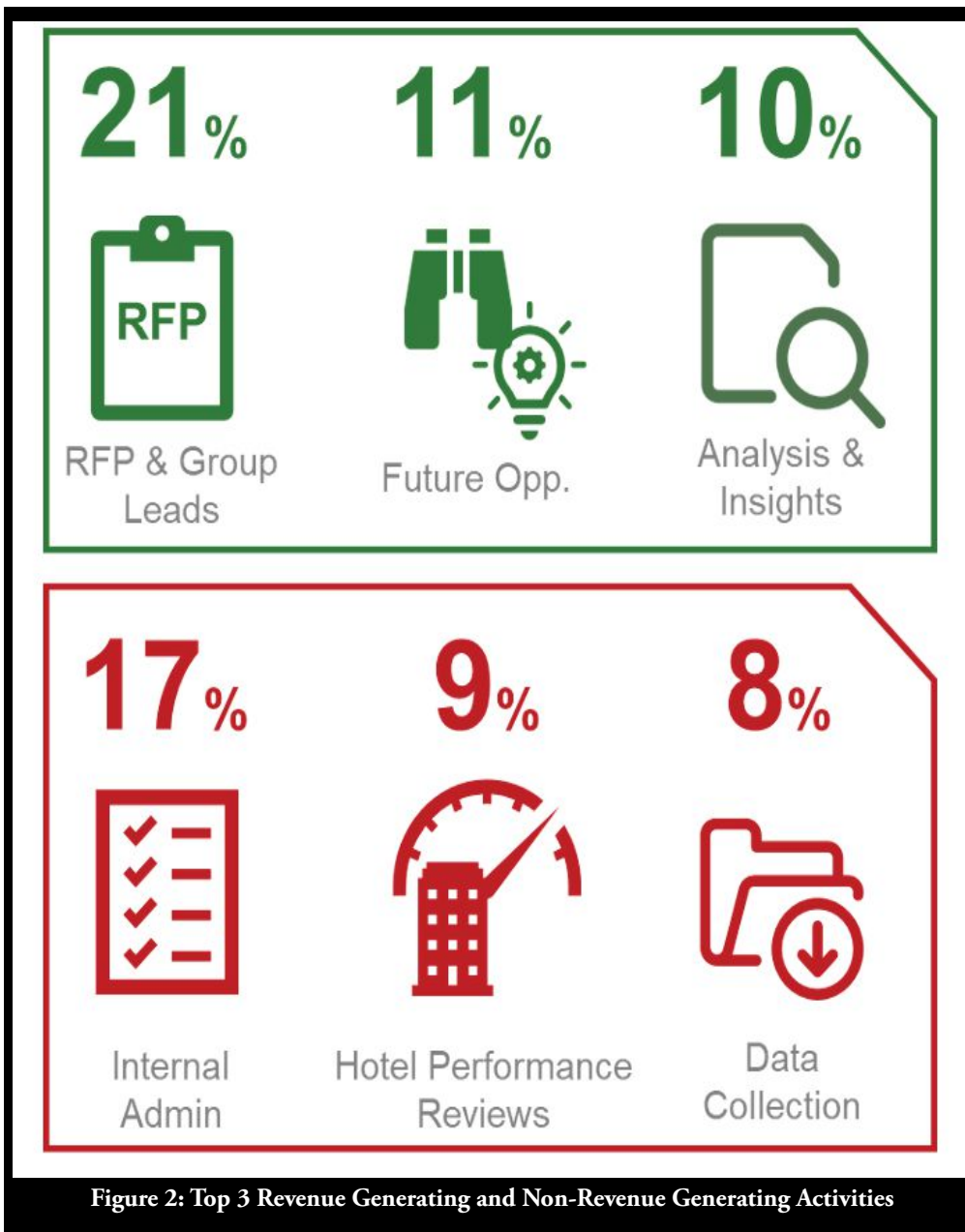


Figure 2: Top 3 Revenue Generating and Non-Revenue Generating Activities

will be crucial in reinforcing the role of the revenue manager as a strategic partner, not a performance reporting, order-taker. For example, to cut back on repetitive questioning, consider offering standardized self-service reporting so that stakeholders can easily find the information they are looking for without relying on the revenue manager.

On that note, our respondents reported that about 30% of their stakeholder interaction time was spent convincing stakeholders to accept their recommendations, and about 80% of their recommendations were accepted. If this 30% of time is spent discussing the overall strategy and refining based on inputs from other departments, and 20% of recommendations are improved by this process, their communication is very effective. If the 30% of the time is spent arguing about what the rates should be this coming Friday, and the GM eventually bullies the RM into changing their recommended rate 20% of the time, communication has broken down. Training on communicating with influence, improved data views to support recommendations and empowering revenue managers to respectfully push back with evidence will keep the RMs effective at guiding revenue strategy.

### DARE to Improve Your Revenue Generating Capacity

Manual processes, repetitive tasks, and inefficient reporting and data access are keeping revenue managers from generating revenue. Any effort to delegate, automate, reduce or eliminate these non-value-add activities will result in improved revenue performance for

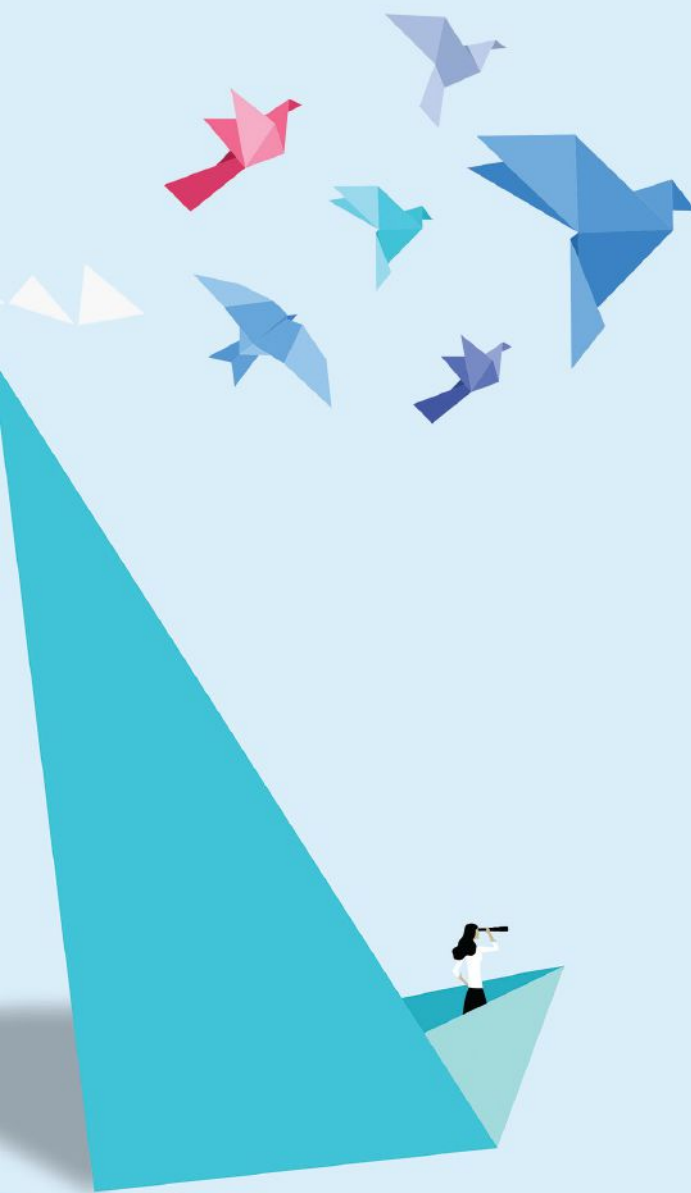
the organization. Consider the following steps:

- **Delegate:** While it is tempting, especially in the face of pandemic staffing reductions, to pile reservations, PMS updates, and data pulls onto the revenue managers, because they tend to understand systems and data best, these activities take time away from focus on revenue. Delegate as much as possible to other roles, even if they are less efficient at it.
- **Automate:** Acquiring an RMS to automate routine day-to-day pricing decisions is only one possibility for automation within revenue management. Consider visualization tools that can automate creation and distribution of reports, or robotic process automation (RPA), where a bot wraps around the technology in highly manual processes and recreates the activities of the human, automating activities like rate loading, RFP response and image tagging.
- **Reduce:** Working with counterparts as necessary, carefully evaluate every internal process, especially things like budgets and RFPs, and see if you can streamline through reducing steps. Be relentless in your pursuit of time back for revenue generation.
- **Eliminate:** By improving communication skills, offering standardized reporting (and enforcing its use) and empowering revenue managers to respectfully push back on stakeholders, you can eliminate the non-productive stakeholder interactions that bog down revenue managers. Consider investing in the tools that revenue managers use to build their case, so they are better able to support their recommendations with compelling data.





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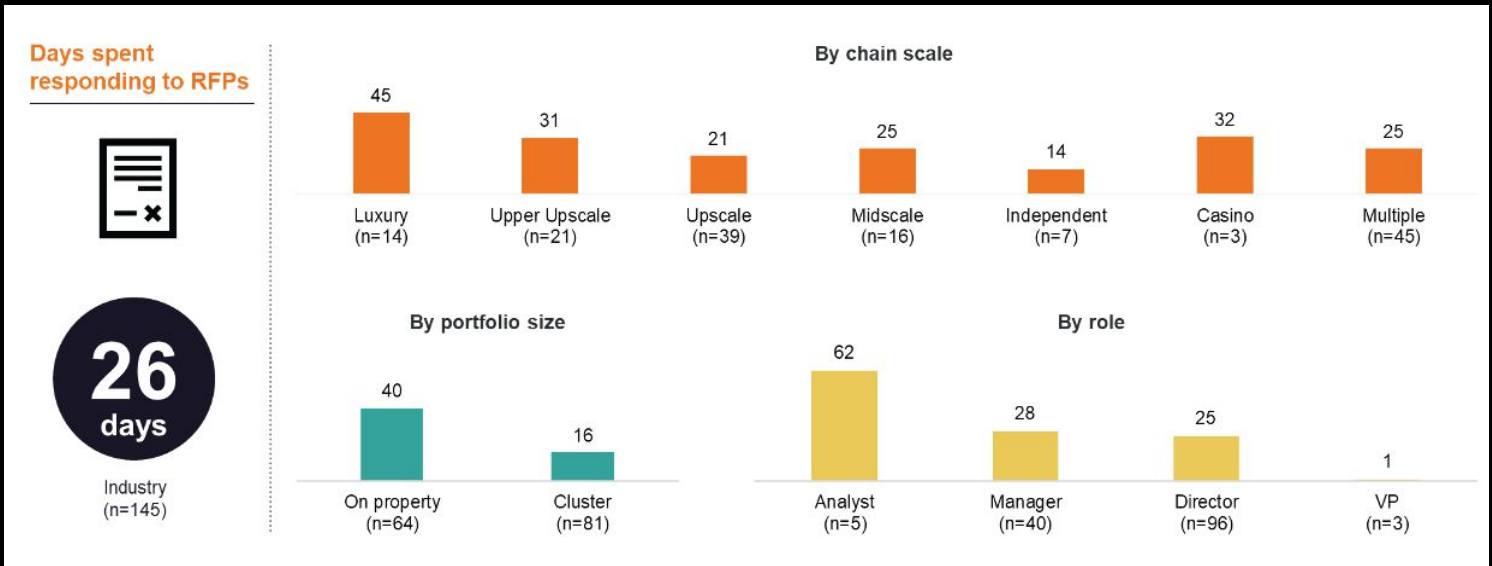


Figure 3: Days spent responding to RFPs

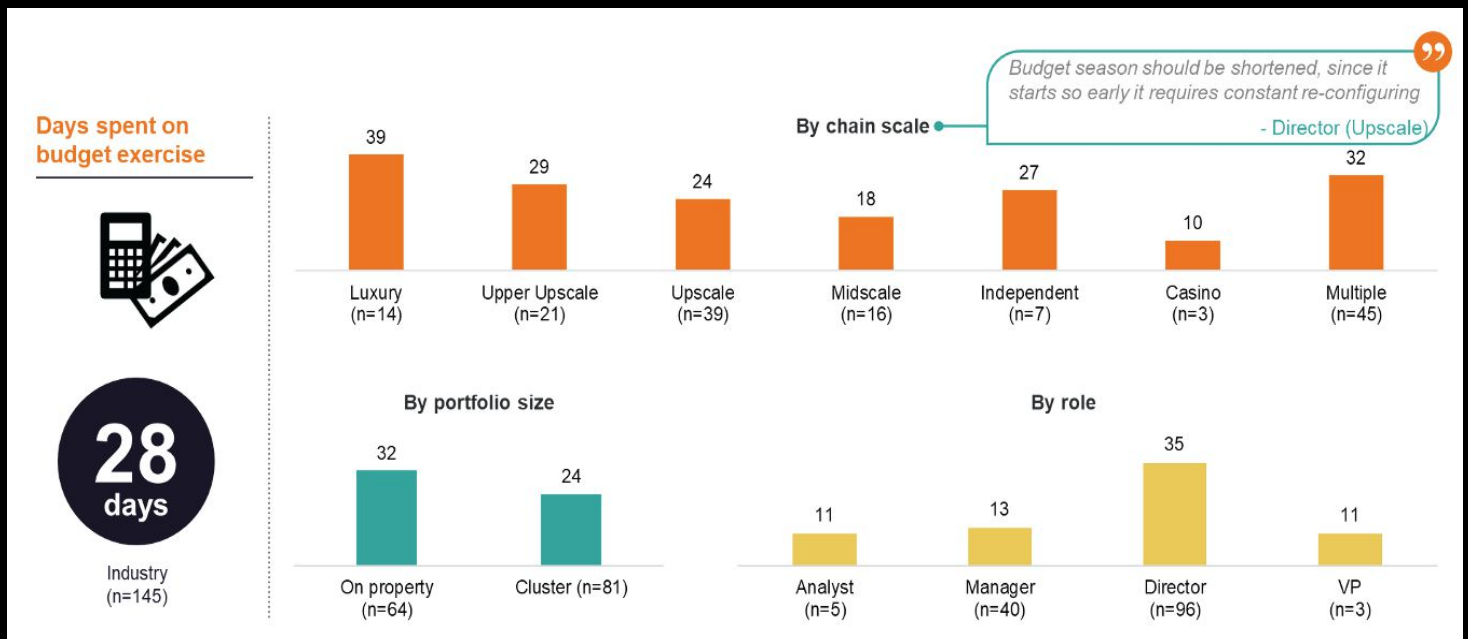


Figure 4: Days spent per year on budgets



## SURVEY RESULTS: WHERE REVENUE MANAGERS SPEND THEIR TIME

Everyone needs to take responsibility for focusing revenue managers on generating revenue. Leaders need to provide the tools and support, but revenue managers need to advocate for themselves, clearly communicating what is standing in their way and what they need to be successful.

So, in closing, do you DARE to focus your revenue managers on revenue?

*Dr. Kelly McGuire is Managing Principal, Hospitality, ZS Associates, where she is responsible for helping global hospitality clients improve their commercial strategy and operations, and to find impactful uses for data science, artificial intelligence and machine learning to support their commercial strategy. She recently served as senior vice president, revenue management, distribution and direct marketing for MGM Resorts International.*

*Paresh Bhandari leads revenue manager for hire at ZS and manages a team of revenue managers focused on hospitality clients. His team manages revenue management for 650+ hotels in NA. He has also helped brands setup and transform their revenue management function.*

For more information, download the full report at: <https://americas.hsmai.org/insight/the-voice-of-revenue-managers/>

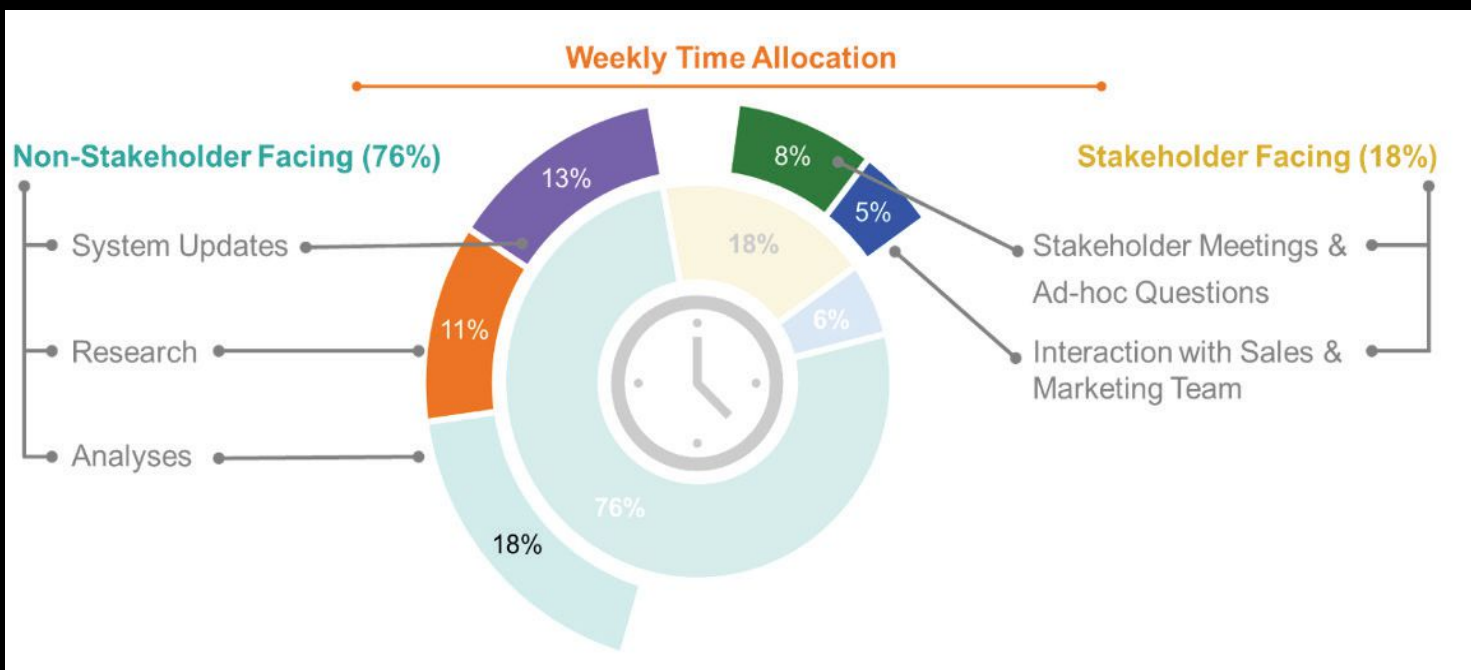


Figure 5: Breakdown of weekly time with the top three activities in each category, except internal administration (6% of weekly time).

### In their own words, delegating, automating, reducing or eliminating tasks will help keep revenue managers focused on revenue...

“Currently managing reservations process for hotel and spend at least 75% of my time on these tasks. Once hotel is not severely impacted by the pandemic, hiring back a reservations agent at least part-time will give me back time to allow me to focus on revenue management strategies” – Director (Upscale)

“Implementing strategic changes, would be nice if we had an analyst to complete this work.” – Manager (Upscale)

“Manual reporting and system distribution maintenance could be automated or outsourced to better make use of time to strategy and analysis versus compiling information and mapping.” – Director (Independent)

# DATABASE MARKETING PART ART - PART SCIENCE



Database marketing is part art and part science. The science is typically sought out through segmentation. Within each segment you can define test and control groups based on hypotheses of player behavior; if the test and control group

is large enough and measures against tests of significance, marketers can prove causation. Marketers use segmentation to reach a player group by choosing one or more variables. Segmentation variables are generally grouped into four buckets: demographic, geographic, psychographic and behavioral.

Demographic variables include age, gender, ethnicity, income, education, and occupation – to name a few. Marketers use these characteristics because they can tie to player needs and behavior. When I worked at a property in Northern California, for example, we coded players based on ethnicity and marketed in-language to Chinese players. These players received a separate creative piece that focused on rich, lucky colors and numbers and was written in Tagalog. This ethnic segment was so important to the business, we even hired an Asian advertising agency out of San Francisco to be sure we conveyed the culture “right.” In other markets, we used age and gender for specific promotional purposes. For deer hunting opener, a red-letter day in

Minnesota, we targeted women for a widow’s weekend offer. We claimed Senior Tuesday by targeting anyone over the age of 55 with specific offer sets.

Geographic variables include distance from the casino, drive time, demographic or metropolitan statistical areas (DMA/MSA), city size, population density and urban/rural definitions. Geographic consideration should be made when segmenting because they influence visitation patterns, spend and player needs. You might define your geographic market by inner, mid- and outer-market, reserving hotel offers for mid- or outer-market players. Casinos also may target food offers to the inner market. If cash is in your bonusing toolbox, you might fence out cash from inner market players to reduce the walk factor, for example. I have also targeted players in specific cities and communities with bonus offers calling the promotion, “Community Days.” It was a goodwill tactic that worked to drive business to certain days. Geodemographic segmentation is a form of micromarketing, which focuses precise marketing efforts on small geographic area such as communities and even neighborhoods. If you have ever deployed a saturation mailer, you have engaged in geodemographic marketing. In the Las Vegas locals market, we jettisoned print and mailed our own custom newspaper to every household within 6 miles of each property. We did something similar in the Gulfport/

Biloxi market when the cost of newspaper ads increased appreciably per column inch.

Marketers sometimes add psychographic variables, such as lifestyle, motives, and personality characteristics, to a segment to give it more dimension. Affiliation and status are motive based. I have used lifestyle variables when selecting promotional gifts. Lifestyles for your market can be queried using Nelsen Scarborough. Work through your ad agency to pull a report. Nelsen Scarborough can give you insights on shopping habits, attitudes, lifestyle, and behavior of the gambler in your market. You can also append spending habits to the record level by purchasing the data through a third-party such as Experian.

The main variable casino marketers use to define a segment is behavioral variables. Purchase behaviors include a player’s visitation schedule or trips and spend. Is the player a heavy, moderate or light user?

The primary behavioral variable used by casinos is worth, which is commonly defined as average daily theoretical or ADT in most gaming systems. Average daily theoretical takes a simple average of a player’s theoretical spend in a casino and is used to predict what a player will spend on their next trip. ADW is a derivative of ADT and takes actual loss into consideration for those who have had an especially unlucky trip. Average daily theoretical takes the total theoretical of a player over an evaluation period and is divided by the

## 20<sup>TH</sup> ANNIVERSARY



“IN AN INDUSTRY THAT IS SO OUT TO SEA ON WHICH WAY TO TURN DURING THESE TRYING TIMES, IT IS A COMFORT TO KNOW THE G&L TEAM IS STILL BRINGING TOGETHER OPERATORS AND VENDORS TO NOT ONLY KEEP CURRENT WITH INDUSTRY TRENDS, BUT ALSO DISCUSS HOW TO HANDLE THE AGGRESSIVE CHANGES THAT WE ARE ALL TRYING TO ADJUST TO. AFTER 20 YEARS OF PROVIDING AN ALREADY INCREDIBLE SERVICE TO THE INDUSTRY, IT IS A COMFORT TO KNOW THAT WHEN THE WORLD WENT WONKY, G&L WAS THERE TO SUPPORT ALL OF US.”

JOHN FILIPPE, EXECUTIVE DIRECTOR OF IT, QUINAULT BEACH RESORT AND CASINO



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number of days played. It is a simple average. While this method is good and fairly accurate for a high frequent player, it is a poor indicator for one-trip players or low frequent players. Your active database is full of players who give you less than three trips; most databases consist of 30% of players with one trip and as many as 30-50% or more with two to three trips. Therefore, when you use ADT as your worth metric to predict player spend, you are making an inaccurate prediction most of the time. For low frequent players, you should be looking at other variables that suggest future spend. Review velocity of play and average bet. Cluster your data to understand the play distribution in your database. Make worth predications on low frequent players based on discrete play patters rather than on ADT or ADW.

A new player or ultra-low frequent player may not expose their entire wallet their first trip. They may be visiting for a concert or came to have dinner. Their trip may not be a gaming trip, but instead a leisure trip. When making a future worth prediction based on ADT or ADW, the prediction is highly inaccurate. Instead, look at average bet and gaming entropy.

Model your new player around those who bet like the new player.

Most casino properties have several mail campaigns that track with the player's lifecycle. There is typically a new member file, loyalty file, pre-inactive file and inactive mail file. Ad hoc and bonus offers have yet another matrix.

While complicated given the interaction to your monthly loyalty file, hold out new players into a separate mail file until they trigger the magical third trip. Studies suggest that once players visit three times within a given period, they have become loyal to your property and will continue to visit.

These matrices can be simple or complex and may include any number of segmentation strategies. The more granular the mail file, the more discrete the offer and reinvestment schedule. Keep in mind, however, the more granular the offer schedule, the more uploads your database coordinator will need to perform. Granularity also means your test and control groups will be smaller; you will need to test over multiple periods to get enough data points to draw any meaningful conclusion and more intervening variables (time and seasonality) may play a biasing role in the results.

Database marketing – part art, part science. It is part art because you must creatively make your offer appealing. While we try to control and predict behavior, humans are human. There are always unknowns that can be credited to art. To understand the player, you need to deploy the scientific method to understand how players react to different offers. How many players responded or converted by segment? How much did they spend? Did they play within their worth band? Was your prediction accurate?

*With more than 28 years of casino marketing, Heidi began her casino career journey as market and research analyst for Grand Casinos in Minnesota where she led internal market research efforts including designing, deploying, analyzing, and reporting on guest intercept surveys, as well as leading qualitative research techniques. She is now the Senior Strategist at Strategic Casino Marketing Solutions and strategic partner of Visions, Inc, co-creating with Visions Inc. an online player communication, contact tool, empowering hosts to custom design, draft approved branded content and messaging, as well as semi-automate delivery through the mailbox and email channels.*



INTERNATIONAL ROADTRIP

# BARBADOS: AN ISLAND OASIS

Bill Healey



Barbados is known for a number of things, including their idyllic tropical beaches, their surf, and as the birthplace of rum. When on the island state, their resorts, spas and leisure are a good way to while away the hours.

In this edition of the International Road Trip, I was fortunate to sit down for a chat with Steve Andrews, a long-time friend, spa owner and Global Wellness Ambassador for Barbados. It was a great conversation.

**G&L:** Give us a bit of a summary on your background in the Spa & Wellness industry.

**SA:** I am a 24-year veteran of the Caribbean spa industry, having established Soothing Touch Massage & Aromatherapy in the mid-1990s, combining my skills as a therapist and my love for and participation in contact sports. In 2002, I combined massage therapy services with beauty treatments and formed Soothing Touch Da Spa Inc. Soothing Touch at the Bamboo Retreat took shape in 2019 as not only a spa, but also a natural retreat.

Recognized by my peers as one of the Caribbean's foremost spa entrepreneurs, my wide range of experience and training has allowed me to conduct spa therapy workshops for therapists across the Caribbean. More recently, I also conducted online training for therapists in Africa, with face-to-face classes to

follow for both Africa and Asia as soon as it is safe to do so.

Currently, I am the Global Wellness Ambassador for Barbados.

**G&L:** You have been involved with the Caribbean Spa & Wellness Association for a while. What was your role with the group, and what does the association provide to the region?

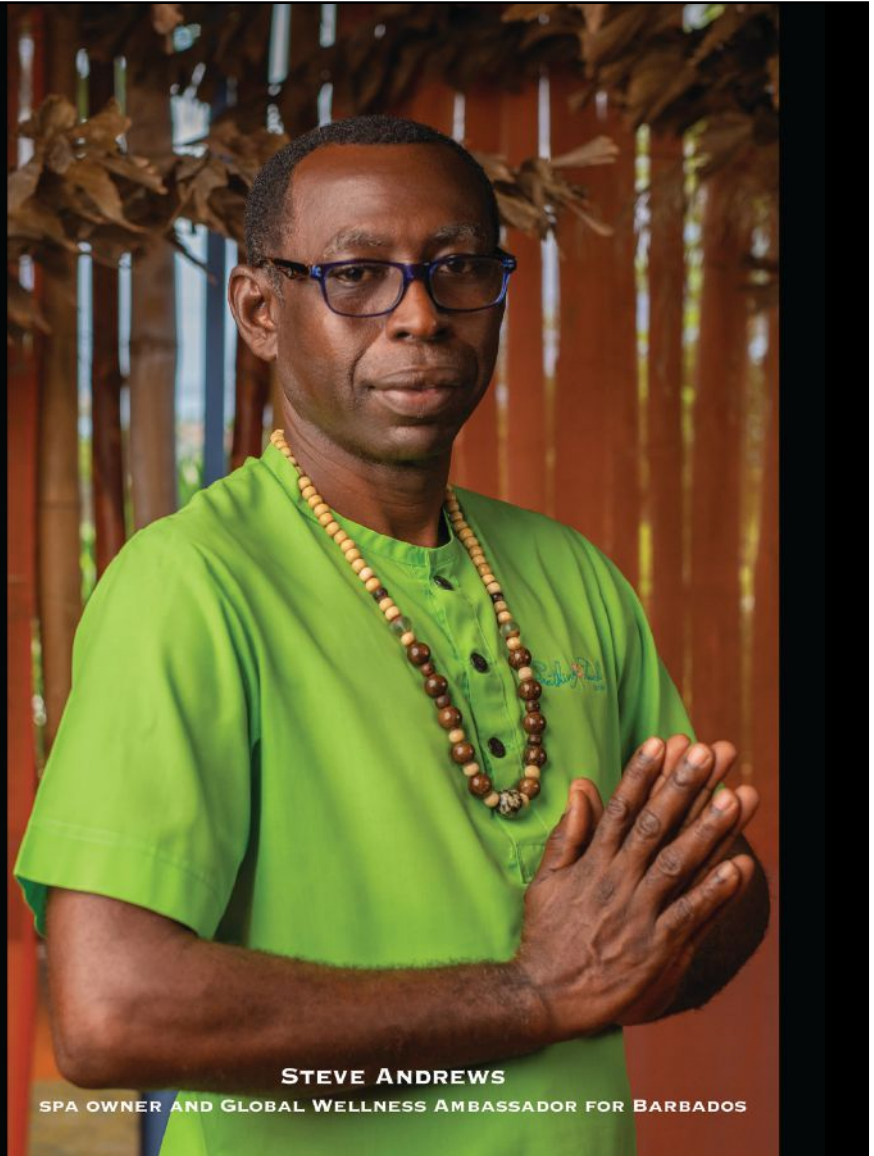
**SA:** My passion to develop the Caribbean as the world's leading spa destination earned me the post of chairperson, Caribbean Spa and Wellness Association (C-SWA). As a founding member, I lent my broad expertise to the association, travelling around the world and looking at best practices for the Caribbean spa





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CLIENTS AND THEIR  
COMMUNITY.**

**- STEVE ANDREWS**



brand and also co-managing a US\$800,000 CARTFUND project with the Caribbean Export Agency, to develop the spa and wellness sector in the Caribbean. Outcomes of the CARTFUND project included regional standards for spas and a regional spa and wellness strategy for the Caribbean. I was also chair of the Caribbean Spa and Wellness Training Committee and organized the first regional training workshop for spa therapists in the Caribbean. Unfortunately, after a change in leadership the association is no longer active.

**G&L:** Have there been many changes in the industry through the years? Do you see any upcoming trends?

**SA:** There have been a number of changes in the industry over the years. When I first

entered the sector, there were about one or two hotel chains offering spa services. As an independent operator, I had greater access to the clientele from the tourist market. Now, most hotels offer spa services so that has reduced our share of the tourism market. So, locals now form a large part of our clientele.

With respect to trends, stand-alone spas, such as Soothing Touch at the Bamboo Retreat, have had the opportunity to become major shareholders in the sector because more and more visitors are looking for a spa experience and not just a service. There is a move toward authentic experiences where spas can differentiate themselves by embracing the cultural and natural environment of their surroundings. Which our clients prefer.

**G&L:** As Barbados is a small island-state,

what challenges have there been in acquiring technology for managing spas? Has the industry's move toward cloud-based applications been of benefit?

**SA:** Prior to the pandemic, small-island states like Barbados did not necessarily place great emphasis on the use of technology in business operations. However, with the onset of the pandemic, many businesses, including those in the spa industry, made the essential move to online operations. With this move, however, challenges remain. Many spa operators are not fully equipped with the technological knowledge to take advantage of the various features of spa management software. Cost is also a major deterrent, which has meant that free spa software that is less effective has now started to penetrate the Caribbean.



**G&L:** Where do Soothing Touch and other spas in Barbados draw their clients?

**SA:** Our clientele consists of a mix of locals and tourists, which is the case for most spas in Barbados. Tourism is the largest foreign exchange earner in Barbados, so there are some hotel spas that rely more heavily on tourists than others. However, given the pandemic, there has been more emphasis on the local clientele.

**G&L:** How has the COVID pandemic

affected you in Barbados, and the Caribbean in general?

**SA:** The pandemic has put a major dent in tourist arrivals across the Caribbean. Our local clientele also depend on revenue from tourism, so this means that they are not able to afford spa services. Spa operators, therefore, have been forced to offer steep discounts to keep our doors open, when we are allowed to open.

**G&L:** Have there been changes to the Spa & Wellness industry due to the pandemic?

**SA:** The industry has had to implement several protocols. However, most of these protocols have always been practiced in spas. These include the sanitization of tools, equipment and furniture, and general hygienic practices such as the washing of hands before and after every service. Traditionally, spas are expected to be highly clean environments. As a result of the pandemic, spas are once again placing great focus on their hygiene practices. Spas have also started to look at different ways of doing business, with a focus on service standards and staff training. They are also



The beautiful grounds at Soothing Touch at the Bamboo Retreat



beginning to see themselves as an important pillar of mental wellbeing.

**G&L:** What are your plans for expanding business in the future?

**SA:** Soothing Touch at the Bamboo Retreat is working to regain its place as the number-one day spa in Barbados. There are also opportunities for training via the master class run by the coaching arm of the business, Steve Andrews & Associates.

The Steve Andrews & Associates Master Class in Massage Therapy and Coaching Programme focuses on the development of therapists in a holistic way. Geared toward catering to individual needs, the class and coaching programme both start with a full assessment of therapists including their understanding of therapy.

Our vision is to help therapists truly unlock their minds to fully understand the power of massage therapy so they can undertake the journey to heal themselves, their clients and their community.

Gaming & Leisure Magazine would like to thank Steve Andrews for the time to chat and wish him the best in his efforts in Barbados, the Caribbean and worldwide.

*Based in Bali, Bill Healey has been consulting, installing, and supporting solutions in the global golf and leisure industry since 1982. He has been involved with over 1,000 systems installations in 40+ countries from North America to Africa to Asia and Australia.*



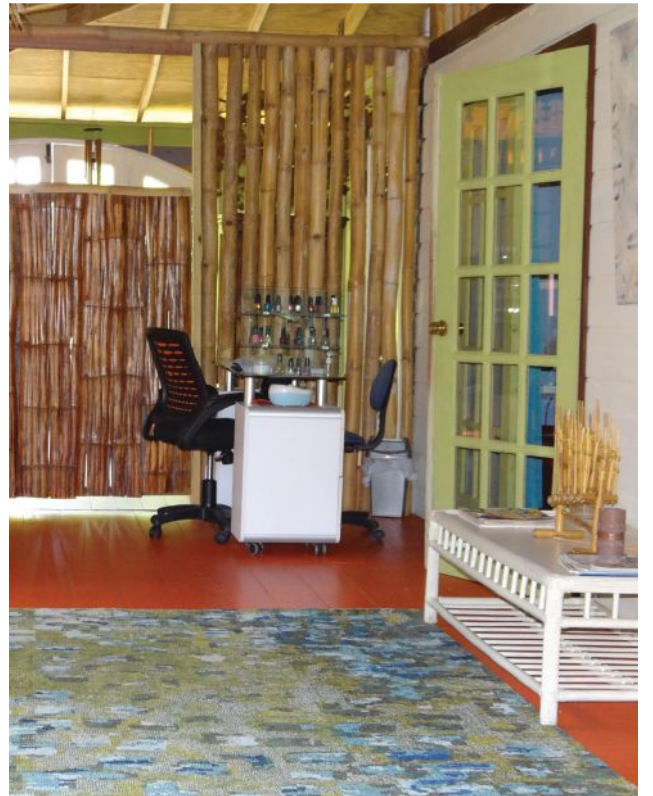
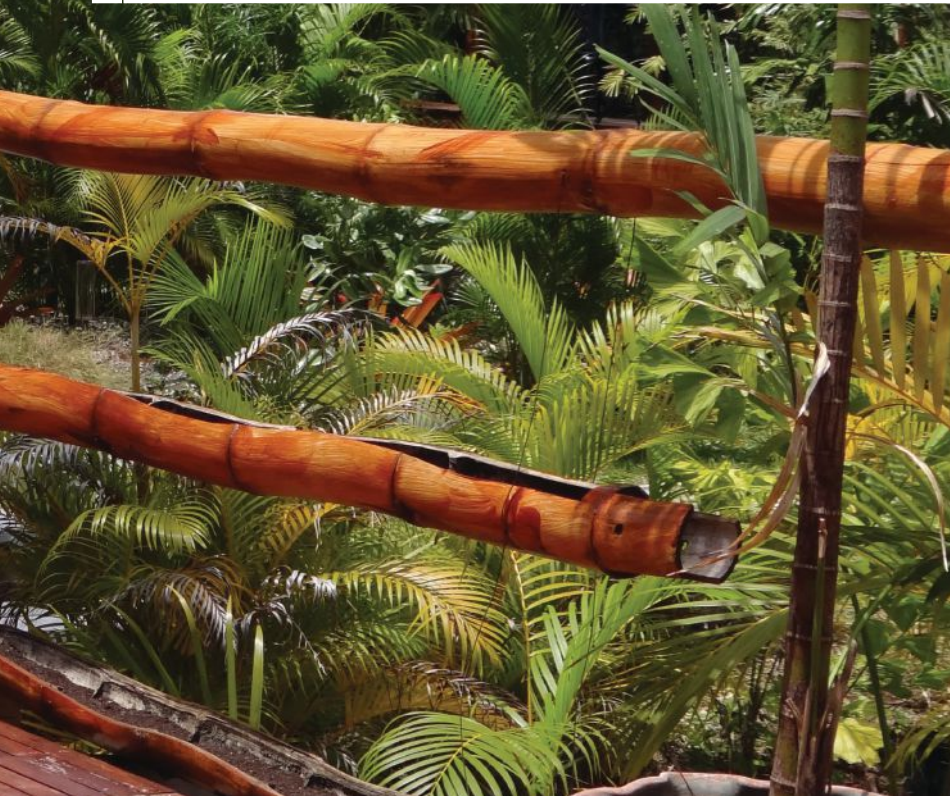
Soothing Touch Reception Area



# A Photo Album from the G&L Roadtrip to **BARBADOS**









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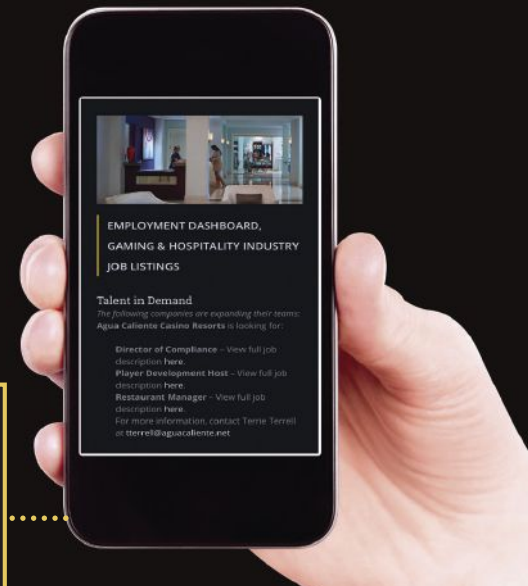
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# STRATEGIC SCHEDULING



In the last issue, the topic of Microsoft Teams was beaten into the ground. If you are not using Teams, shame on you. However, this issue's topic is going to rely on a company having implemented Teams or a similar tool.

Unfortunately, the ongoing pandemic continues to force organizations to modify operations, whether a result of federal or local government guidelines, organizational policy, or simply common sense. As we all know by now, physical distancing is one of the preventive measures recommended as a method of combatting COVID.

One way to partake in physical distancing while continuing to support one's property from a technological perspective is to utilize strategic scheduling. As technologists, much of our work can be performed without physically being present. Remote access tools, virtual servers/systems, mobile applications, cloud-based applications, and the ability via multiple tools to share information have all grown in functionality and ability. Certainly, someone still has to be on property to move that occasional printer, perform maintenance, replace the batteries in a mouse, or push the power button when all else fails.

Using strategic scheduling, a leader can prevent the loss of his or her entire department to COVID exposure and/or quarantine for 10-14 days. Instead of everyone being in the office, limiting onsite presence can ensure the technology (or other departments) can remain functional while also protecting the team.

**Example 1:** Separate the department into different technology disciplines, e.g.

leadership, application support, network, and service desk. Assuming a five-day workweek, each discipline has only one representative physically in the office on any given day. If there are three network team members, over the course of a week, TM#1 would be on property Monday and Thursday, TM#2 on Tuesday and Friday, and TM#3 on Wednesday. The next week, TM#1 works Tuesday and Friday, TM#2 Wednesday, and TM#3 Monday and Thursday. If there are three members in each of the other disciplines, keeping the team segmented is easier as the same people in the other disciplines would rotate using the same daily breakdown. Rotating on property will most likely be easier for larger departments able to spread the on-site component around.

By keeping a rotation of same days with different disciplines, should exposure occur only the same rotation set of team members are impacted and the rest of the department can continue unexposed.

**Example 2:** The technology team works on property as normal however, each week one person is designated as the stay-at-home person. They are still performing their duties but completely remote. By keeping one person away from the office for a week, if unfortunately, a member of the team is exposed, at least one person will be able to return to the office and be onsite. In smaller departments, this may be the most advantageous configuration to utilize.

**Example 2A:** The technology team works remotely, but each week one person is designated as the on-site person. This is the exact opposite in that only one person is on property while everyone else works remotely. In smaller departments, this may be problematic

depending upon how much physical interaction is required to support the environment.

**Example 3:** In this schedule arrangement, instead of working eight-hour work days, members of the technology team work longer days – 10 or 12 hour days – increasing their time on property but reducing the amount of personnel present. Instead of having everyone on property all at once over a 40-hour, five-day workweek, the team may have one or two people onsite for three days while other members are off. As one set of workers reach 40 hours, those off earlier in the week begin their 40-hour workweek. Coverage for the property exists as well as reduced exposure and touch points for the team members.

**Example 4:** By far the most drastic option, scheduling this way has all members of the department working from home and only being on site when necessary for hands-on experience. This configuration will likely be the least desired by the end-user community.

Regardless of the method chosen to schedule one's department, ensuring the safety of our team members in this unique operational time is critical for leaders. One thing to keep in mind with work-from-home team members is to clearly define expectations, response time, and productivity measurements. One other success point is to communicate the coverage and schedule of the technology team to the end-user community. Strategic scheduling can be a safe and successful opportunity for technology departments.

On a completely different note, I want to take the remaining space to say goodbye to a good friend and technology partner in Anthony DeLeon. Having used the PlayerSoft app for many years and working alongside Tony, I can honestly say what a huge loss to the technology community. I always enjoyed talking with him, and he truly seemed to care about the success of those using his technology. I will miss him.

*The views of this article are solely Dr. Mike's and do not and are not associated with or represent the views of any employer past or present. In 2021, the Cubs will be number one!*



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# PULLING BACK THE CURTAIN ON OPEN APIs FOR HOSPITALITY



Integrated gaming resorts have probably the most complex ecosystem of technology products in hospitality. CIOs and IT departments are challenged to bring new offerings into existing ecosystems at an unprecedented pace. They must also support these more complex operations with a thinning margin for error. Creating a modular technology ecosystem allows a property to be nimble when guest or business requirements change.

## Flexible Core Systems

Point of Sale (POS) and Property Management Systems (PMS) serve as the foundational elements of any hospitality operation. Just like the height of a home is limited by the depth of the foundation, the ability of a modern API connected ecosystem to service the needs of guests and the business is limited by the functionality depth that your core systems support. Core POS and PMS systems need to be robust to serve the needs of today and flexible to support the unknown needs

of tomorrow without requiring you to pour a new foundation each time.

## Open APIs

Many new solutions have sprung up in the last 12-18 months that are built on top of APIs, Application Programming Interface. Open (or public) APIs bring a lot of promise with open-source reference implementation and extensible plug-in architecture to support different deployments.

On the other hand, public APIs can also be a nightmare for IT teams and software developers building enterprise grade applications. Applications in the gaming infrastructure need to be elastic. Scaling out and in as loads fluctuate like when bookings peak on the weekends or POS orders increase when a show ends. While open APIs allow for quick deployment of new technology, they may not account for the level of flexibility a property requires. Integrations must be highly available and have high throughput to support this 'always on' business.

According to almost all industry forecasts, we are expected to see unprecedented demand in the next 12 months. As we leave

the negative displacement of the pendulum swing and with great anticipation, lean into the positive, our collective ability to deliver and implement modern and robust open APIs with two-way integrations is vital to meeting guest expectations.

## Maximize What's Available

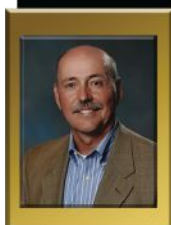
Ever get excited about a new two-way integration only to find after implementation that a limited number of features are connected?

Much to all our disappointment, we often find open APIs cater only to the lowest common denominator. This approach, while acceptable for some, leaves many of the features or reasons you purchased a solution on the cutting room floor.

There is a misconception that public APIs are only possible with cloud-based systems. APIs in simplistic terms are a means to communicate and 'open' indicates systems are communicating with a generally agreed upon language. Therefore, it is possible for API connections between cloud and on-premise solutions to co-exist.

Layering on new functionality in a modular approach maximizes usage and flexibility

# 20<sup>TH</sup> ANNIVERSARY



"FROM A FLEDGLING START UP NEARLY 2 DECADES AGO, G&L HAS BECOME THE DE FACTO STANDARD FOR R2020 HAS BEEN SUCH A CRAZY YEAR TO DATE AND WE'VE SEEN TONS OF CHANGES TO CASINO OPERATIONS. AT A TIME WHEN TRAVEL IS LIMITED AND OUR TRADE SHOWS HAVE BEEN CANCELLED, IT HAS BEEN BLESSING TO RELY ON THE G&L COMMUNITY FAMILY TO COMMISERATE WITH AND RECEIVE ADVICE AND COUNSEL. THE G&L COMMUNITY FAMILY OF FRIENDS AND PEERS HAVE BEEN EXTREMELY HELPFUL. WE ALL HELPED EACH OTHER THROUGH THIS PANDEMIC BY OFFERING SUGGESTIONS, BEST PRACTICE IDEAS, AND JUST HAVING LIKEMINDED PEOPLE TO DISCUSS OPERATIONAL BUSINESS PROBLEMS AND SOLUTIONS. I AM PROUD TO BE A PART OF THE G&L FAMILY AND THANK YOU FOR THIS COMMUNITY!"

LES LEONARD, VP IT BUSINESS SOLUTIONS, SENECA GAMING



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in your core system, while allowing you to find new venues to offer a more personalized guest experience and new revenue opportunities.

Each enterprise has a unique infrastructure and co-existing interfaces (including serial). Taking care to vet open APIs is a worthwhile practice, especially for guest facing solutions. Side-stepping this task reduces the available data for the guest profile, limiting the ability to personalize experiences and gain insightful data.

When evaluating technology providers for our own business operations, we have found that those who “eat their own dog food” and use the same APIs they offer us with their own solutions have proven to be valuable partners. Understanding this key point about a vendor is also a quick litmus test for the level of features offered in their open APIs.

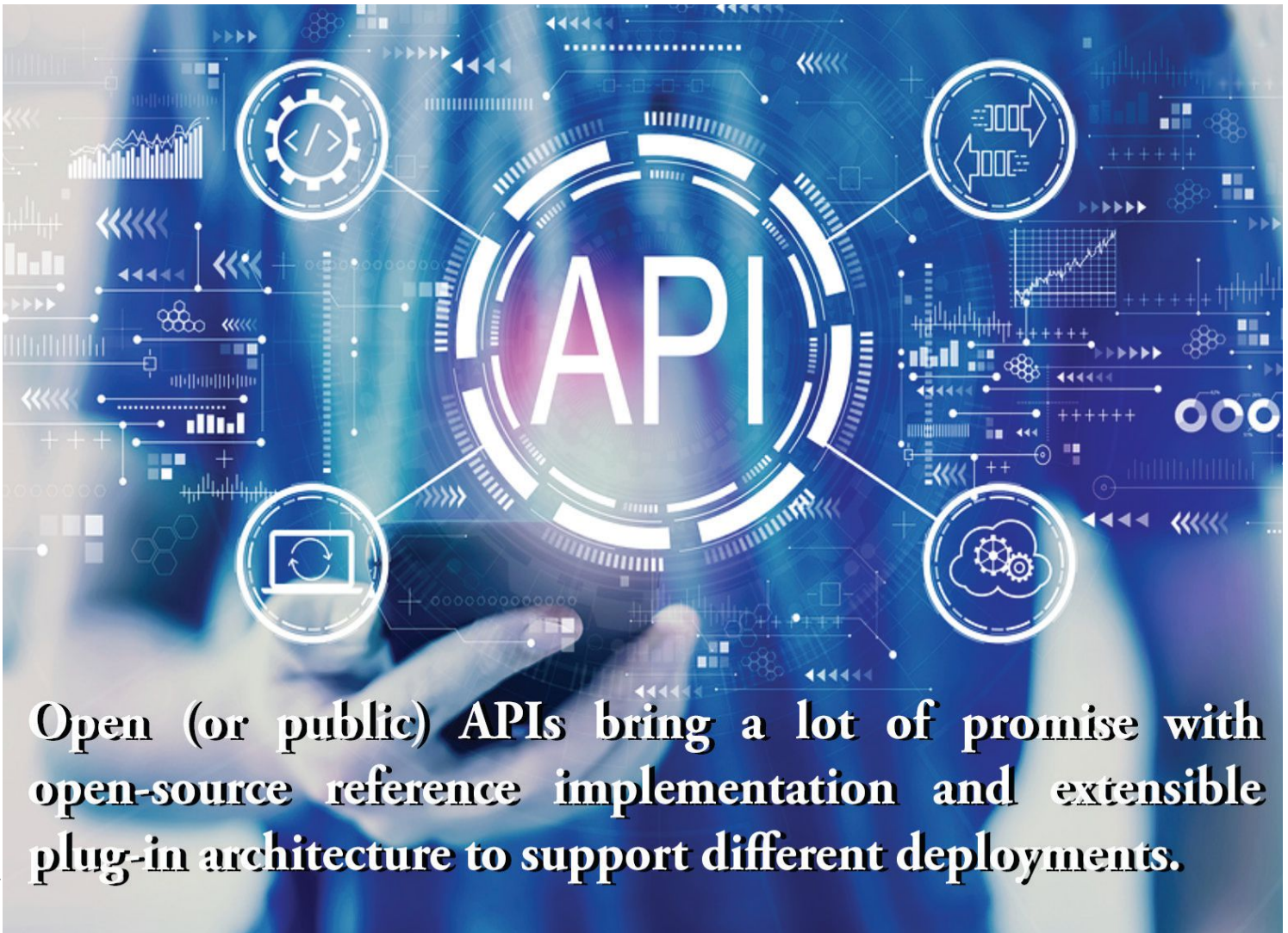
**The Path Forward**

The last 18 months has taught us that change can come very unexpectedly. According to a study conducted by Philippa Lally and published in the European Journal of Social Psychology, it can take from two to eight months to form a new habit. Given how long the pandemic has stretched, we can be sure some new habits have been formed by our guests.

The fundamental premise of hospitality, to create memorable experiences for our guests, will not change. What will change is the

context and method in which those experiences will be created. The need of the hour is not just innovation but rapid innovation at scale. This requires a modern ecosystem that is robust, modular and evolving to your changing needs.

*Mr. Robith Kori is the Vice President of Corporate and Product Strategy at Agilysys, a leading technology company providing advanced software and services for property management, point of sale, kiosk, analytics, payment, and mobile solutions to the gaming and hospitality industries. Mr. Kori leads the product strategy teams, specializing in innovative solutions on multiple platforms, including the company’s Property Management, Point of Sale and Payment products. Working alongside the world’s most reputable gaming enterprises to ensure actionable innovation, successful deployments, staff training and optimal software utilization, Mr. Kori is an accomplished executive who brings more than 15 years of demonstrated technology expertise and leadership to the Agilysys team. He is a graduate of Harvard University with a Master’s degree in General Management and a graduate of Virginia Tech with a Master’s degree in Industrial Engineering. In his spare time, Mr. Kori enjoys travelling and hiking with his wife.*



**Open (or public) APIs bring a lot of promise with open-source reference implementation and extensible plug-in architecture to support different deployments.**

Courtesy of iStock.com

# BELLA (ISSIMO): THE ART OF CUSTOMER LOYALTY



*Your business looks a lot different than it did a year ago. And it will look different a year from now. Now more than ever, the only constant is change – and your fate lies in how you respond to it. No doubt you’ve been singing John, Paul, George and Ringo’s tune by working Eight Days A Week to mine your loyalty programs and reclaim past customers. But perhaps it’s time for a Revolution? Maybe it’s time to follow the lead of a tech start-up that’s banking on this crazy idea: All You Need Is Love.*

The unprecedented body blows all of us in the gaming and hospitality industry absorbed from the 2020 pandemic will require working like a dog for years in order to reclaim what’s been lost. We lost more than time. More than money. The very idea of “business as usual” has gone by the wayside.

## But That’s Not Always A Bad Thing

Like never before, we have the ability – and more importantly, the need – to reshape the way we do business. To reimagine the way we engage clients and customers. We’re still reeling from the “change that’s chosen us.” But what about the change WE choose? What buttons can you push to revitalize your brand, your business, and your success in the eyes of a transformed world?

In searching for inspiration regarding new ways gaming and hospitality properties can connect with people, the most logical place to start is the device almost every adult on the planet has in the palm of their hands – their smartphone. This, in turn, led me to an industry where I never would’ve thought to look for exciting new ideas – banking.

Banking? Seriously?? What novel ideas have banks come up with over the past few decades? None I could think of...until I came across a tech start-up that’s hoping to rock the banking industry with a new service that is totally free, fun and “full of love.” It’s a company called BELLA, and they just might become the Beatles of Banking.

## Michelle My Bell(a)

BELLA is a first-of-its-kind “compassionate banking service” that offers a new approach to banking – one driven by community. And powered by features that may prove to be as disruptive as they are uncommon in an industry usually identified by stodgy, unfeeling numbers.

This digital bank, which launched near the end of 2020, offers the usual no-fee deposit accounts that are hallmarks of challenger banks. BELLA offers FDIC insurance to each member for up to \$5 million (far greater than the \$250K most major banks insure), offers access to the Visa-brand payment network (including Apple Pay, Google Pay, etc.) and allows members to make cash withdrawals at any ATM that accepts Visa globally. ATM fees

are reimbursed to members at least two times a month. All of which is nice...but that’s not what makes BELLA special.

## Magical Mystery Tour

“Our crazy mission is to inject love, beauty and empathy into the banking industry,” exclaims CEO and co-founder Angelo D’Alessandro. From the outset, he’s put his money where his mouth is. During the first four weeks of its launch, BELLA randomly bestowed cash-back rewards of 5% to 200% (up to \$2,000) on customers’ everyday purchases.

The \$1 million effort was redirected from BELLA’s marketing budget and shared with its community instead of buying Facebook or Google ads. The idea is to keep current customers happy in the hope they’ll tell their friends. And BELLA will become popular through word-of-mouth advertising.

## Come Together

Karma is a key component of the BELLA banking community. Inspired by the Italian tradition of caffè sospeso, where you cover someone else’s cup of coffee when buying your own, each member can deposit up to \$20 in a





# 20<sup>TH</sup> ANNIVERSARY



"2020 HIGHLIGHTS ONCE AGAIN THE EXTRAORDINARY VALUE IN THE RELATIONSHIPS DEVELOPED THROUGH AND WITH GAMING & LEISURE. THE ABILITY TO CONNECT WITH PEERS ACROSS THE VAST SPECTRUM OF HOSPITALITY COMPANIES REPRESENTED AT G&L SPEEDS OUR ABILITY TO RESOLVE AND WORK THROUGH UNTOLD CHALLENGES. THANK YOU G&L!"

BILL MARTIN, CIO, AEG WORLDWIDE



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personal "Karma Account" to surprise another BELLA member by paying it forward.

A BELLA member in Los Angeles might have their morning mocha covered at random by another member in Florida – a nice surprise that inspires love and kindness within the community. There's even a BellaLovesMe100 index on the app that tracks these random acts of kindness in real time.

## Help!

One of the coolest things about BELLA's novel approach to banking isn't the list of account services, but the banking experience itself. Rather than relying on a traditional menu interface, BELLA's app uses an elegant conversational interface called Socratex, which utilizes AI tech from conversational commerce giant Liveperson.

There's a text field at the bottom of your screen at all times. Tap that field and start entering a keyword – Socratex instantly interprets your intentions and provides an intuitive way to complete day-to-day banking operations. This isn't a chatbot – it's more like an intelligent, easy-to-use command line interface. Start typing "send," and it'll suggest, "send money." Enter an amount and press the

next button. You'll be prompted to enter the name of a contact, add a new contact, etc.

No need to search through a maze of menus – the app guides you to construct full sentences describing your intent. Building relationships with customers using sentences and conversations feels more human, reminding us that we're more than just an account number. Want to speak to a real person? Type "human" or "help" for 24/7 support. In a world where most companies make it almost impossible to direct questions to an actual human being, this is breath of fresh air.

## Here Comes The Sun

In virtually every aspect of their business, BELLA's core values of beauty, sharing, helping people and having fun with banking are on full display. Those rainbow Visa debit cards sent to customers who open an account? They're made with recycled ocean plastic. Future cards will be designed by artists who share BELLA's values in their lives and their work.

Members can customize their checking accounts by adding hashtags and photos to transactions (making them easier to organize). You can also create an unlimited number of savings accounts (no minimums required) and set up your own rules for funding them. You

can specify the transfer \$100 a month to savings, or have some fun by choosing from the unconventional ideas BELLA suggests – like transferring \$5 to savings every day it rains in your city.

Your rainy-day fund, like all of your BELLA savings accounts, earns an interest rate that is six times higher than the national average (a paltry 0.3% at press time, but better than the other banks). Future plans even call for an emergency fund that members can draw from with no payback requirement.

"We believe in the idea of trusting people," says D'Alessandro. "Very soon we'll see if this works, or if it was just a dream." A compassionate business model that puts people before profits – love can make you do crazy, revolutionary things.

*Op/ed column submitted by Ann Nygren, President of Key Consulting Software. KCS is an IT consulting company focused on iSeries gaming and hospitality applications for clients ranging from Caesars, Eldorado Resorts, TI and Vail Resorts to Hard Rock, Pearl River & Casino Arizona, Resorts AC and more. Ann can be reached at ann@kcsoft.com.*

Courtesy of iStock.com



# THE EXTINCTION OF THE YELLOW PAGE DIRECTORY



Did you even notice? (I did not.) The “Yellow Page” directory printed for the last time in January 2019.

## When Did It Begin?

The first telephone directory, consisting of a single piece of cardboard, was issued February 21, 1878. It listed 50 individuals, businesses, and other offices in New Haven, Connecticut, that had telephones.

## Why Yellow Pages?

In 1886, when Reuben H. Donnelley established the first classified telephone directory advertising, he helped create an entire industry that we know as the Yellow Pages.

No one knows for sure how those pages turned yellow. They didn’t start that way. Legend has it the printer ran out of white paper in 1883 and rather than wait weeks for a new shipment, they used yellow.

## Type Set Readability

Up until 1933 it was a “free for all” industry. This changed in 1938. AT&T commissioned the creation of a new type font, known as BELL GOTHIC, the purpose of which was to be readable at very small font sizes when printed on newsprint where small imperfections were common. Research showed that black type on yellow paper was the easiest combination to read other than black on white.

At the height of the industry, according to “Frugal Marketing” by Mike McDaniel, there were over 2,300 independent yellow page type directories produced by 250 publishers in the nation. The largest independents were Yellow Book and TransWestern Publishing.

The industry of the Telephone Directory, Telephone Book, White Page Directory, and Yellow Page Directory was created to provide “Information” beyond phone numbers.

In the beginning, many of the telephone directories provided instructions: how to use the telephone service, how to dial a particular number – be it local or international, what numbers to access important and emergency services, utilities, locations and contact information of hospitals, doctors, and organizations that can provide support in times of crisis. Most included civil defense or emergency management information. Many included transit maps, postal code/zip code guides, international dialing codes, stadium seating charts, and of course, advertising.

Advertising was the key. Before every home had a television, before the invention of the internet, during the decades where homes had an encyclopedia set and dictionary, phone books were delivered to the front doorstep (in large cities), a captive audience whether each residence had a phone or not. The premium positions for advertising were the front and back cover as well as the first page, and for the clever business purchaser, the page where your company’s non-paid line listing appeared or a full opposing page to your listing location.

## Flash Forward

The new world of internet access everywhere. Does anyone really care that the paper directory industry has died?

There are groups who still use/want paper directories. This population is not computer/smart phone savvy or perhaps does not have the finger dexterity to “type” the entity or person’s name to locate the phone number. And let us not forget the group that wants to use “speech” capabilities of a computer or smart phone – unfortunately not all accents are understood by voice recognition to locate the information being sought. For these folks, flipping paper pages to locate the address or phone number is the solution.

The other group that has an interest in phone books is historians who are seeking to

learn family history. When searching for cousins, great aunts, or grandparents, it can be very helpful to find an address of where they did or presently live. Yet even this “paper path” now has an online site titled “Old Phone Book” (<http://www.oldphonebook.com>), which can take you back to 1994. It allows you to search across the U.S. for individuals who were listed in a phone book. In fact, history sells; on June 17, 2008, Christie’s lot 371 – a copy of the first phonebook that was more than a sheet of cardboard made headlines when it was sold at auction for \$170,500.

So how are the majority of your potential and current clients obtaining information about your specific venues/restaurants/hotel options? Online of course. But did you know those “google,” “white pages,” “yellow page” feeds are flawed more often than not?

The “free” listing line is the main BTN (billing telephone number) from your invoice, which may not be the main number used by your organization to advertise the restaurant/hotel/casino customer service etc. The communication carriers go a step further, and if you want to suppress that number to not come up through the internet search a fee is charged (range \$1.50-\$5.00 per month). EX: “Stardust Grill” is the first line of the invoice with a BTN of 310-555-1234, and the number that the “Stardust Grill” advertises is the third line in the hunt group 310-555-1555. Then the two numbers can be suppressed and/or some carriers will charge to make the requested number be the listed number for a fee (\$5.00-15.95 per month).

My advice to all clients is to do your company searches beyond double-checking the amazing company website that many dollars were spent to build and enhance over time (and yes, often errors can be found on company websites that money is spent each month to maintain). Check all of these websites and be specific for every listing a client might



search – Google, Bing, Firefox, www.Dexyp.com and www.yellowbook.com. This is like finding a needle in a haystack, but the result of a potential customer not getting through because it was too difficult to locate that one phone number or to find an incorrect phone number is enough to lose potential revenue.

Make note of all errors, and cross-reference them back to the monthly carrier invoices. If it is the main BTN but the feed has transposed digits – that is correctable and at no cost to you. It will take time and persistence to find the correct folks within each organization to take ownership and provide a tracking number to ensure completion. If it is a number you are paying to suppress – then file a claim for refund and a correction. If there is a number being paid for to be advertised, and it doesn't easily come up under the basic search, then other factors should be considered. Is it worth paying for each month? Is a refund due because it isn't accessible?

Our average client with 50+ directory listings, paid and free, truly only needs one-fifth of them. Client ease of communication access is a priority on the internet land of directory listings.

Don't bother with the "paid" websites that act as a search engine for phone numbers and addresses. Almost all, 99%, of potential clients do not use these sites to locate the direct number.

### Can Paper Phone Directories Be Obtained?

Anyone can call 1-800-888-8448 to receive a paper version of the white page directory for their area, or go to www.yellowbook.com to order a yellow page directory – but the areas available are very limited. Where available, be sure to indicate if you want the English or Spanish version.

I highly recommend to all of my clients to proof the paper directories for errors. If you are a company that still pays to advertise in a white page directory, then you have leverage to get corrections made for the next printing (phone books get printed, generally, in September- November and released in January-March). Getting the "free listings" corrected without purchasing paid advertising must happen through the carrier route.

### How Many Directory Listings Does A Company Truly Need?

That depends on the business/industry. The general rule of thumb is the least amount possible, but if it is a swap of a human voice to an auto attendant, stick with the human voice answering the call. This creates a sense of "community" especially in the gaming and hospitality industry.

A recent client with over 50 listings through Centurylink didn't want to spend the money to suppress listings they did not want published. The first step was to establish which listings should remain. The final answer was only five were relevant. Through a standard Telecommunication Invoice Audit, we eliminated invoices by combining related services and changed the main BTN on three invoices.

This produced immediate cost saving benefits as follows:

- Reduced 12 invoices down to 3.
- Costs associated with suppressing numbers
- Eliminated paying for numbers that were not the main BTN on existing invoices that were no longer relevant.
- The total savings annually was over \$1,500, not including the time savings for finance staff and the savings by cutting/mailing/issuing fewer vendor checks.

### Last Thoughts

The gaming and hospitality industry uses telecommunication carriers – AT&T, Centurylink, Sprint, Verizon, Spectrum, Comcast etc., that send feeds to online phone number directory companies that don't check/proof/care if the listing information is correct.

These same telecommunication companies provide feeds to the handful of regional whitepage print publishing companies that also don't check/proof/care if the listing information is correct.

It is up to each organization to decide if an error or many errors can or is causing the loss of potential business and to decide if that potential revenue loss is worth the time to research and then have the listings fixed.

If it has never been done there will be money saved. Does any casino/hospitality organization need over 30 published directory listings!? From my perspective as a Telecommunication Invoice Auditor, every client who has had W.B. Communications research/review this information stated it is worth the time, followed by some version of, "we can now forget about it for another 10 years!"

*W.B. Communications is a Telecommunication Invoice Auditing Company that performs audits on a contingency-fee basis. Our client base has expertise in working for: Tribal Casinos, Physical Fitness Facilities, Privately-Owned Restaurant Chains and large hospital systems throughout the United States. Our standard Telecommunications Invoice Audit includes the deep dive research on directory listings as an avenue to reduce "hidden" costs. If you have questions please feel free to email me at twankoff@wb-communication.com or call 973-216-3208.*

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"EVERYONE IN G&L HAS ONE COMMON TRAIT – AND THAT IS THE DESIRE TO HELP OTHERS! G&L HAS FOSTERED A COMMUNITY OF LEARNING, SUPPORT AND NETWORKING THAT IS MUCH NEEDED IN THIS INDUSTRY. IT'S BEEN GREAT TO BUILD THESE CONNECTIONS AND FRIENDSHIPS THAT WOULD HAD NEVER BEEN POSSIBLE WITHOUT THE G&L TEAM'S SUPPORT AND ORGANIZATION. THANK YOU FOR BRINGING US ALL TOGETHER AND FOCUSING ON IMPROVING THE GAMING INDUSTRY!"

JOSH FORD, CIO, JAMUL CASINO



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# ESG IS HERE

## IS THE GAMING INDUSTRY READY?



*Environmental, social, and governance (ESG) reporting has been increasing in prevalence for several years. A new administration and increasing focus from investors are spurring the next wave of requirements. Many gaming companies will need to develop new processes and implement new systems and controls to meet the challenge. This means the finance and IT organizations will be front and center in this mission-critical area.*

### What is ESG

ESG refers to environmental, social and governance. In the context of companies, ESG is a broad, and integrated, term to capture the strategies that exist to address risk in these areas, capitalize on opportunities, and measure and report progress. For example, buying from a diverse supplier base may be a requirement for a casino in certain states, so ensuring the company has processes in place to do so (and then report compliance) mitigates a regulatory risk. But the potential to source new goods and services from vendors the gaming company may not have otherwise accessed represents the opportunity for competitive advantage.

ESG has continued to rise in importance over the past several years, based on scrutiny in each of the ESG areas. Climate change has been a primary driver of the environmental focus, and traditional land-based casino companies certainly can relate given the significant footprint

casinos have on the environment. Social change has included the focus on promotion of diverse workforces and supporting the community, and many states have made these requirements for gaming operators. Gaming companies also promote responsible gaming and other social concepts. Finally, good governance has also long been a focus of state gaming regulators, but has also become non-negotiable for many institutional investors.

### ESG Reporting Globally

One of the more challenging elements of an ESG program is measuring and reporting relevant information about the results of a company's efforts. Reporting of ESG information has increased significantly in recent years globally and has become more sophisticated and extensive.

KPMG conducts an annual survey on ESG reporting that tracks reporting trends

by companies globally. The survey reviews reporting by two groups of companies – the largest 250 companies in the world (G250) and a sample from 5,200 companies representing the top 100 companies by revenue in 52 countries (N100). Some key findings from the 2020 survey include<sup>1</sup>:

- Eighty percent of companies globally report on sustainability; however, less than 25 percent report on the risks from loss of biodiversity;
- Third-party assurance of sustainability information in corporate reporting is now a majority business practice worldwide;
- A significant majority of companies connect their business activities with the United Nations' Sustainability Development Goals (SDGs), with economic growth, climate

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"HAPPY 20TH ANNIVERSARY GAMING & LEISURE. 2020 HAS BEEN SUCH AN UNCERTAIN TIME FOR EVERYONE BUT I AM COMFORTED IN THE FACT THAT JEANNIE AND APRIL ARE STILL WORKING HARD ON KEEPING EVERYONE ENGAGED ON THE HOSPITALITY AND TECHNOLOGY FRONT. I FEEL SO BLESSED TO BE ASSOCIATED WITH SUCH A GREAT GROUP OF PROFESSIONALS AND LOOK FORWARD TO MANY MORE YEARS OF FRIENDSHIP AND FELLOWSHIP. G&L IS THE ONE CONSTANT THAT WE CAN ALL DEPEND ON TO MAKE SURE THE DREAM AND VISION LIVE ON. HOPE TO SEE EVERYONE IN 2021. CHEERS!!"

DANIEL PARKER, DIRECTOR OF IT, MGM SOUTHERN OPERATIONS  
BEAU RIVAGE RESORT AND CASINO & GOLD STRIKE RESORT AND CASINO



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## ESG critical components



**Figure 1: ESG Critical Components (source: KPMG)**

change and responsible consumption the most frequently prioritized.

The U.S. has been trailing other parts of the world, particularly Asia and Europe, in ESG reporting. In particular, third-party assurance of such reporting is not nearly as common in the U.S. and is not required. However, as noted later in this article, that is likely to change.

### ESG Reporting in Gaming

An informal review of ESG reporting by large gaming companies (consisting of a cross-section of land-based and online operators, suppliers, REITs – all both U.S. and international) found the larger gaming companies generally lagging behind the benchmarks of the KPMG survey. If companies of smaller size are reviewed, it is common to see no formal ESG reporting in the industry.

Gaming companies that do report on ESG tend to disclose more in areas like inclusion and diversity and reporting carbon

targets, as well as identifying and reporting on specific social areas of focus for the industry, such as responsible gaming.

Related to the emerging areas of ESG reporting, only a small handful of gaming companies prepare an integrated ESG and financial report and even fewer (I could find only one major gaming company – IGT) had received a third-party assurance report. In addition to the established larger companies in the gaming industry, we are also seeing a wave of newly public companies driven by online gaming, and these companies may soon be subject to new rules discussed in the following section. It appears that gaming companies will have significant work to do in order to “catch up” to both best practices and emerging regulations in ESG reporting. Later in this article, I discuss some action items companies can take to start closing those gaps.

### What's On The Horizon?

The focus on ESG has ramped up quickly in

the U.S., with several paths of work within Federal agencies and from the new Presidential administration. For example, the Federal Reserve Bank's formation of a new Supervisory Climate Committee, several Executive Orders on climate, and the SEC named a new Senior Policy Advisor on Climate and ESG<sup>2</sup>. Federal agencies often consider disclosures and reporting in areas of focus and from companies under their jurisdictions. Two logical expectations that companies can prepare for are:

- More prescriptive reporting requirements, especially for public companies
- An “integrated” reporting model where financial and ESG information are reported together.

On the first point, to achieve proper reporting with increased risk of sanctions will require a new approach to ESG reporting. In most

## The KPMG Approach

The KPMG approach is collaborative, engaging your team of cross-functional professionals and leaders to align and own ESG goals.\*



Figure 2: The KPMG Approach (source: KPMG)

Sources

<sup>1</sup> “The time has come; The KPMG Survey of Sustainability Reporting 2020,” December 2020.

<sup>2</sup> KPMG, “Washington Report 360” (newsletter), January 29, 2021 and February 5, 2021.

gaming organizations, the current ESG reporting (if there is any) is managed by a group other than the accounting and finance group that manages financial reporting for regulatory bodies. These reports typically lack the controls, systems, and processes that result in regulatory risk being mitigated for financial reporting.

On the second point, as noted in the earlier section on ESG reporting in gaming, most companies are not reporting information at all, and few are doing so on an integrated basis. The integrated nature of reporting will likely ultimately lead to external assurance requirements, further highlighting the need for rigorous processes and controls where few exist. To stay up to date, KPMG has a website dedicated to ESG, KPMG Impact, where new developments and other information are posted.

### Take Action Now

Companies should not underestimate the level of effort required to upgrade to current standards—and meet quickly expanding standards—for ESG reporting. Like any reporting requirement, there is a project plan to be established. The first critical requirement is to get the right team in place and include all relevant stakeholders. Financial reporting teams cannot accept responses like, “The community impact team can take care of that.” As new requirements roll out, controls must be in place. And those responsible for aggregating, accumulating and analyzing ESG data are eventually going to ask IT for help in a panic once they realize the level of effort to do so manually. CIOs need to push to be included from the beginning.

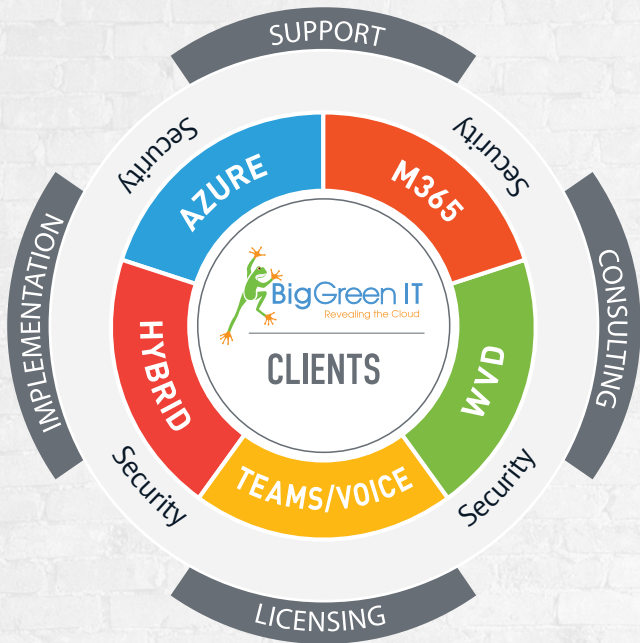
Getting outside help will make sense for companies in various ways, depending on in-house capabilities. Simply staying current on requirements will take effort. Advisers can leverage experience with other clients who are farther ahead and other similar rollouts of new regulations to give companies a more effective and efficient rollout strategy. And if new systems or processes are required, especially in compressed timelines, companies can leverage that expertise in similar ways as an ERP implementation or when SOX was implemented.

### Don’t Lose Sight of the Opportunities

Finally, companies should not lose sight of the opportunities presented by ESG. Employees expect their employers to share their values and be stewards of more than shareholder value. And shareholders themselves are making choices based on how companies perform in this area. And there are clear business opportunities as well. Conventions are making location selections based on the environmental impact of the host convention center; a more robust supply chain comes from leveraging a diverse group of suppliers; states allowing casinos to expand use ESG concepts to rate the proposals they receive from operators. These and other reasons help justify the investments required for the more stringent and formal reporting requirements.

*Rick Arpin is the Managing Partner of the Las Vegas office of KPMG. He is a seasoned finance and operations executive with deep gaming, hospitality, sports, and entertainment experience.*





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# CASINO REVENUES DURING THE GLOBAL PANDEMIC



Casinos joined the entire entertainment industry in suffering through 2020 and beyond. I have a great idea. Why don't we close down all non-essential businesses for three weeks to flatten the curve of virus infections and deaths? Does that sound like a good idea? Here we are, over a year later, and we have all been on a roller coaster ride of closings, openings, closings and unprecedented restrictions on our activities. This article will examine the impact of the pandemic on casino revenues.

Of course the obvious revenue hit was bad, but casinos also were required by multiple regulatory agencies to spend millions of dollars on barriers between players and employees, employee testing, air filtration systems, masks, cleaning and disinfectant supplies, plus additional staff to monitor compliance and ensure mask wearing. Too bad we didn't all invest in plexiglass futures! While the efforts were set forth as necessary, for how long can be debated. The added negative impact on players' enjoyment of the casino and resort experience for short-and long-term is difficult to measure.

## Nevada Casinos

Nevada casino revenues and expenses have been impacted as much as almost any market globally, except for Macau. Nevada is dependent on tourism, including convention business. The recovery for non-local Nevada casinos will take a long time as many people and businesses plan far in advance for activities and, with the uncertainty of having an enjoyable experience or event still looming large, making firm plans and commitments could easily push poor results into 2022.

The 2019 total gaming revenues in Nevada were \$12.03 billion. In 2020 those revenues declined by about 35% to \$7.87 billion. A deeper dive into the statistics shows that Clark County (mostly Las Vegas Strip) was down 82% in revenue in the second calendar quarter of 2020, predominantly due to full closures. In addition to gaming, visits to Las Vegas are often highlighted with awesome entertainment. The state collections for entertainment taxes almost went to zero in the third and fourth quarters of 2020 – an actual decline of over 99%, as almost all shows and concerts were cancelled and, of course, the entertainers put out of work. Employees basic and tip income also declined (i.e. disappeared), though many major casinos continued to pay and support their employees during the early phases of the pandemic.

In 2020, Las Vegas also suffered through massive convention cancellations. In 2019 Las Vegas Convention Authority reported 6.6 million convention attendees and 42.5 million visitors. In correlation to the gaming revenues the convention attendee count shrunk to 1.7 million and visitor count landed at around 19 million. With a room inventory the largest on the planet of 150,000 plus rooms, the Strip turned into a ghost town for much of the year.

Is it getting better? The short answer is very slowly. The latest data for the three months from December 2020 through February 2021 still showed a 29.3% decrease in gaming revenues for the State of Nevada and a 33.6% decrease for Clark County compared to same three months a year earlier.

The restrictions in Nevada have been tough and the Governor has been slow to lift them. The good news is that very few casinos have been closed permanently, limited primarily to casinos that were already on the edge. As noted, casinos were closed for a while and then upon re-opening the operators faced a large variety of obstacles to provide a suc-

cessful and entertaining experience for their customers, including:

- Limited occupancies
- Closed down bars and restaurants
- Inactive machines at video poker bars
- Turning off every other machine or more
- Plexiglass at gaming tables and bars
- Masks for all employees and customers
- Temperature checks upon entering facility
- New procedures for cleaning
- Limits on food service
- Almost no live entertainment
- Elimination of buffets
- And living with the “mask police” and risks of related fines and sanctions

The above is a long painful list and some of the limitations may not go away for many years or forever. Bottom line is that the restrictions have been very expensive. Incurring these costs while at the same time suffering revenue loss is not easy. To some degree I was actually surprised that for the last five months of 2020 Nevada gaming revenues were only down 24.0% and Clark County 27.6%. There is pent up demand and, optimistically, things can only get better in Nevada.

## U.S. Casinos

The restrictions that were placed on Nevada were common throughout the U.S, at times varying in degrees and length of shutdowns. For the most part Las Vegas and the State of Nevada have a greater challenge than other markets due to their dependency on tourism. That is a general comment as there are many casinos whose revenues are “substantially” based on tourism, but the Las Vegas Strip has a very high dependency.

Figure 1, sorted in order of lost revenue percentage, recaps the impact on the top ten commercial gaming revenue states. Much of the decline is actually more related to length



<u>State</u>	<u>2019</u> <u>Gaming</u> <u>Revenue</u> <u>(In \$ Millions)</u>	<u>2020</u> <u>Gaming</u> <u>Revenue</u> <u>(In \$ Millions)</u>	<u>Revenue</u> <u>Decline</u>	<u>Percentage</u> <u>Decrease</u>
New York	\$ 2,728	\$ 1,184	\$ (1,544)	-57%
Nevada	\$ 12,031	\$ 7,873	\$ (4,158)	-35%
Louisiana	\$ 2,460	\$ 1,658	\$ (802)	-33%
Maryland	\$ 1,756	\$ 1,226	\$ (530)	-30%
Missouri	\$ 1,728	\$ 1,263	\$ (465)	-27%
Ohio	\$ 1,941	\$ 1,440	\$ (501)	-26%
Indiana	\$ 2,249	\$ 1,709	\$ (540)	-24%
Pennsylvania	\$ 3,383	\$ 2,696	\$ (687)	-20%
Mississippi	\$ 2,247	\$ 1,795	\$ (452)	-20%
New Jersey	\$ 3,467	\$ 2,881	\$ (586)	-17%
<b>USA TOTALS</b>	<b>\$ 43,640</b>	<b>\$ 29,981</b>	<b>\$ (13,659)</b>	<b>-31%</b>

**MACAU Gaming Revenues - Comparison of 2020 to 2019**

<u>State</u>	<u>2019</u> <u>Gaming</u> <u>Revenue</u> <u>(In Mop)</u>	<u>2020</u> <u>Gaming</u> <u>Revenue</u> <u>(In Mop)</u>	<u>Revenue</u> <u>Decline</u> <u>(In Mop)</u>	<u>Percentage</u> <u>Decrease</u>
Macau	\$ 293,312	\$ 61,047	\$ (232,265)	-79%
<b>Conversion Rate</b>	0.125	0.125	0.125	
	<u>(In \$ Millions)</u>	<u>(In \$ Millions)</u>	<u>(In \$ Millions)</u>	
Macau	\$ 36,664	\$ 7,631	\$ (29,033)	-79%

*Figure 1: US and Macau 2019 - 2020 Gaming Revenue Comparison*

of shutdowns in various states than it is to reduced play, especially in markets with strong local targeting. New York's extensive shutdowns reduced revenue by over 50%. New Jersey revenues are interesting. New Jersey was totally closed down for just over three and a half months, about 30% of the year. However, New Jersey only had a reduction of 17% for annual revenues. In other words, New Jersey casino revenues were up for 2020 if you subtract out the closure period. New Jersey did benefit from strong online gaming revenues in 2020 adding to total gaming revenues. (See Figure 1)

Overall, U.S. gaming revenues declined by 31% in 2020. Expectations are that local casinos should come back strong in 2021 as the restrictions are lifted and unleashed restrained demand feeds the markets. In addition, the stimulus checks being widely distributed rather than targeted, will provide

some disposable income that may land on the gaming tables and in the slot machines. Unfortunately, those markets that are highly dependent on conventions will likely be waiting until 2022 for a significant comeback.

One of the bright spots in gaming revenues in 2020 and in future years has been the increase in online gaming revenue. That positive trend will continue as many markets have opened sports wagering with the potential of online casino style gaming not far behind.

**Macau Casinos**

Macau is the largest casino market in the world. In a normal year the revenues compete with total commercial gaming revenue in the U.S. (not including Tribal casino revenues). While the casino industry struggled immensely in the U.S. market and around the globe, no market was decimated more than Macau. The pandemic resulted in the long-term clo-

sure of Macau casinos and the China travel restrictions have combined to reduce that market's gaming revenue by 79%. Macau gaming revenues were \$36.7 billion (U.S. Dollars) in 2019. Gaming revenues declined to only \$7.6 billion in 2020.

**Closing Comments**

The negative effect on the casino industry also extended to their business partners and suppliers. The G2E gaming show, which is an important opportunity for suppliers of gaming equipment, software and services to show their latest and greatest products was cancelled in 2020. The ability of the industry vendors to sell their products almost totally dried up. With loss of revenues and cost of modifications to meet pandemic rules, there were very few funds left to make capital expenditures or to pursue non-essential services. As a result, the gaming vendors struggled to make minimal sales. Vendors' ability to return to normal will be delayed until casinos can recover and then find the resources to invest in new games.

The return to normal will no doubt be a "new normal" as many changes may never go away. Gaming revenues will continue to increase back to pre-pandemic levels throughout 2021 and should be in good shape in 2022. The players and customers are looking forward to returning, and casinos are ready to welcome them back.

*Tom Doyle (Retired CPA) is currently Chief Financial Executive for Thunderbird Lodge Preservation Society. Previously Tom was Vice-President of Product Management and Systems Compliance for Scientific Games. In this capacity he directed the various aspects of Bally System software products and regulatory compliance efforts from August 2002 to November 2017. Prior to Bally, Tom spent about 3 1/2 years as the General Manager of the Spa Resort Casino in Palm Springs, California working for the Agua Caliente Tribe. Tom has been in the casino industry since 1977 and has enjoyed positions with Lodging & Gaming Systems as a Director of Consulting and Financial Officer (4 years), the Peppermill Hotel Casino group as a VP (6 years), and the Nevada Gaming Control Board. At the Nevada Gaming Control Board he was Audit Supervisor and one of the key authors of the original NGCB Minimum Internal Control Standards.*

# MAKING THE MOST OF THE DIFFICULT DOWNTURN



One year ago, everything changed as we knew it – the way we lived, the way we worked, the way our kids were educated. Everything stopped, and for a time in the summer of 2020, our industry was frozen in time. By

April 2020, Nevada, the U.S. hub of gaming, trade show conventions, live entertainment and tourism, had reported a shocking loss of 1.1 million jobs –33%. In our industry across the U.S., closures resulted in job losses from a high in February 2020 of 16.9 million to just 8.6 million a month later. Our industry was hurt badly, maybe the worst of any industry as a result of the pandemic. Although we all thought at the time that closing indoor activities was the right and safe thing to do, throughout 2020 nothing much improved to get them back open. However, one bright spot that emerged was in the area of technology in a meaningful way, and new terms such as “touchless,” “curbside,” and “digital payments” became important to getting the travel and leisure industry back up and running. Although, it was slow at first because state-by-state regulations did not make it fast or easy.

Many cities and industries were hit hard with closures throughout 2020. These were cities that hosted conventions – like New York, Chicago and Las Vegas to name a few. But other cities such as Orlando and Ana-

heim/LA also hosted major tourist attractions so the impact was far greater. At the time of writing this article, Disneyland California was still closed, but looking to do a soft opening in April 2021.

Businesses invested heavily in solutions and providers that could deliver easy-to-use technology and advanced systems with little up-front costs. Where capital was hard to come by with closures causing limited cash flow, owners shopped solutions that provided little upfront costs or options to lease technology over time. Some companies are now offering no upfront costs and using a revenue sharing model on the backend. What does this all mean? Technology companies that were willing to be innovative, not only in their solutions, but in the way they worked with customers, set a new standard for how investing in technology can be done during a global pandemic.

Now back to gaming and casinos. Where the pandemic hit hard, some bright spots and trends made by casino companies has been in the area of sports betting. No doubt this investment may have been challenging, as there was little to no sports being played in 2020 to bet on, none-the-less casino companies started grabbing up companies and making huge investments in this type of technology in a way to optimize and grow customers and increase loyalty. No doubt the most visible of these investments was Penn Gaming buying Barstool Sports lead by Dave Portnoy. This

\$163 million-dollar investment has led to Penn’s stock price more than tripling since the 2020 36% acquisition. Portnoy also has become somewhat known for his crazy investments in the Stock Market (while sports betting was on hiatus due to COVID-19) and helping struggling restaurants helping raise \$18 million in donations.

Not to be outdone, MGM Resorts International launched BetMGM last year and enlisted Jamie Foxx to help promote the app. The results have been mostly positive, driving new revenues for the company, exceeding forecasts and targets. Other companies are also entering the sports betting market. Golden Nugget, led by Landry’s Chief Tilman Fertitta, launched Golden Nugget Online Gaming, which he hopes to wrap into his \$6.6 billion IPO of Landry’s later this year.

*Michael Caruso has over 20 years of experience in the casino, resort, hospitality and travel industries. Michael is an entrepreneur, thought leader and trusted advisor helping hotel companies with digital transformation of the guest experience and shifting legacy applications to the cloud. In addition, Michael enjoys working with soft-ware companies and contributing strategies that drive meaningful organic sales growth. Previously Michael worked in sales leader-ship roles managing global business development with Agilysys and Infor.*

## 20<sup>TH</sup> ANNIVERSARY



“OVER THE YEARS, I HAVE DEPENDED ON THE GAMING & LEISURE PLATFORMS AND COMMUNITY FOR A LOT OF MY LONG TIME CONTACTS, RESOURCES, AND INDUSTRY INSIGHTS. THE CONTRIBUTION THAT GAMING & LEISURE HAS GIVEN TO THE INDUSTRY HAS BEEN INVALUABLE AND SHOULD BE ONE OF THE RESOURCES THAT YOU USE IN YOUR OFFICE TO ENSURE THAT YOU DON NOT LOSE YOUR CONNECTION TO THE WORLD OF GAMING AND HOSPITALITY”

BILL OLIVER, PRESIDENT AND CIO AT FUSION RESOURCE SOLUTIONS,  
AGUA CALIENTE BAND OF CAHUILLA INDIANS



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# MODERN DATA SCIENCE IN THE GAMING INDUSTRY: ANALYSIS, PREDICTION, & OPTIMIZATION



The gaming industry is being modernized through a collection of computational tools and methods falling under the umbrella of “data science.” The usage of “data science” has grown to include almost all forms of analytics, forecasting, optimization, and even artificial intelligence. The main purpose of this effort is to maximize long-term profits through optimizing all the smaller decisions a hotel and casino operator make, ensuring the player has a great experience and continues to spend their time and money with that establishment.

Operators have long understood the value of customer relationships and are using data scientists to be even more precise. Operators know that making accommodations for high rollers can pay off and that a well-timed comp for a casual player can keep them returning again and again, and the operators’ data scientists figure out how to size the rewards optimally. Data science is not limited to loyalty programs though. Slot machine designers are using data science to finely tune game math designs to keep players gaming longer, offering just the right win frequency and spin timings to entice longer sessions. Hotel operators are using data scientists to figure out how much gaming activity on the floor is necessary in order to offset the cost of a free room and which players are most likely to do it. The same mathematics for recommending a movie on Netflix can be used for recommending where to eat in a casino with multiple dining options. A sophisticated recommendation algorithm can even send a promotion based on other known affiliates of the customer. For example, if the system detects both the patron and their spouse on the property, it might trigger a discount for a

romantic dinner experience versus a discount at a sports bar for a group of friends. There is no limit to the careful application of mathematics in the gaming industry, and the most sophisticated operations are well on their way to achieving extremely optimized operations. Is there a way for smaller operations, without the budget for a huge team of scientists and software engineers, to take advantage of these techniques? Absolutely. To understand the time and cost for data science projects, operators should break down the project into development phases and estimate the requirements for each phase.

Modern data science projects are composed of three phases: collecting and organizing relevant data, analyzing the data to truly understand the situation at a fundamental level, and finally making a prediction and recommendation that optimizes the business model. This is true for Silicon Valley tech giants, tiny startups, and everything in between including casino operations. The gaming industry is fortunate that so much activity is already being tracked through electronic gaming machines, loyalty rewards, cash access, and entertainment purchases. Casino operators use this enormous amount of data to understand the customer behavior with an unprecedented level of precision, and consequently can optimize their operations. Where should a casino operator start in order to improve their operations? It all starts with data collection.

First, collecting the data typically involves a data engineer setting up pipelines that ingest the enormous amounts of data being produced before being organized into databases for analysis. A data engineer must overcome the challenge of organizing data coming from disparate player tracking systems, payment systems, and operational databases and then architect a system that is accessible for analysts. Thinking ahead about which business questions to answer and deter-

mining the required data to measure is critical. A data engineer should meet with managers to ensure the appropriate data is being generated and collected as part of the design process. An ounce of prevention and planning is worth a pound of cure.

Next, a data scientist or data analyst writes queries and investigates the data, often working with the appropriate business leader with specific expertise to gain a deep understanding of customer behavior. For example, the data scientist would meet with the slot floor manager and find out what the slot floor manager wishes they knew about customer behavior, and then craft a solution to measure it. This phase is often open-ended exploratory work to find customer patterns and behaviors that are not obvious. Investigations into customer behavior rely on a good understanding of the product or service, so it’s imperative that the data scientist be intimately familiar with both the business and the customers. The quantitative benefits of data science serve to enhance what a good analyst already intuitively, so it’s very important for an analyst to gain a strong intuition through a deep familiarity with the product or service. At first, it may seem overwhelming to business leaders that so many factors play into customer behavior. Data scientists often rely on pattern recognition and clustering algorithms to understand factors that lead to desired behaviors and scenarios, and even discover other factors that haven’t been directly measured. This is particularly useful when so many things influence the model that the data scientist needs to reduce the scope down to a handful of manageable knobs to turn for optimizing the business.

Finally, the value added from data science is most clear when the data scientist or machine learning engineer develops sophisticated mathematical models that use the refined and cleansed data to predict behavior and recommend business decisions to drive the





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business. The models are trained and tested against historical data to ensure robust performance when put into production. Often this final stage involves modern machine learning techniques that require a lot of computational resources, as well as teaming up with developers to deploy models that can scale as needed. Can a small business compete without owning their own data center and expensive servers? Again, the answer is definitively yes, through the usage of cloud-based solutions.

Modern casino operators are learning that cloud-based solutions like Amazon Web Services, Microsoft Azure, and Google Cloud can accelerate development timelines while keeping proprietary data secure. Cloud services provide a wide array of tools and hardware that data scientists use to explore the data, for building predictive machine learning models, and to automatically deploy the models without having to worry about building a whole data center's worth of infrastructure. The cloud service providers, as well as online educational services like Coursera, offer a wide array of educational videos to help customers get started with working in the cloud. The ability to efficiently rent services for short periods of time, paying for computation and storage only as needed, helps provide an on-ramp for smaller companies to access the same quality infrastructure as Fortune 500 companies. Cloud-based data science services avoid the upfront equipment purchases and on-going equipment upgrade costs, and they allow small companies to pay for precisely the amount of computational power necessary

while it is needed. For example, suppose a data scientist wants to train a facial recognition model for recognizing and welcoming customers. The data scientist can spin up a powerful computer in the cloud for less than a dollar per hour, train their model, and then shut down the rented cloud service. Then they can deploy the model on a very modest and cheap computer either on-premise or also in the cloud. Training models requires orders of magnitude more computation for a short period of development time, whereas deploying a trained model can typically run on a very lightweight machine. A decade ago, small companies were forced to purchase very expensive and powerful computers for training models that quickly became obsolete, and now they can simply rent cutting edge hardware as needed.

Before the COVID-19 pandemic, gaming was already transitioning from a cash centered business to a cashless environment centered on digital payments. The pandemic accelerated that trend, providing a tsunami of additional data to be utilized. Data scientists are now gleefully connecting the dots between cash access activity, advertising, loyalty promotions, gaming, and retail spending. As the industry transitions to digital payments, the data generated on the casino floor is becoming far richer and more detailed than any human can ever keep track of individually. A well-designed program knows exactly how to treat every single customer based on their spending behavior, demographics, and personal history. Whether that player is a

casual local visitor that recently spent all the cash withdrawn an hour ago, a tourist from a distant zip-code that is likely to hit the ATM again, or a wealthy local business owner at the bar, players can be categorized and their behavior becomes predictable. Casino hosts will utilize this information to optimally treat each customer segmentation. Hosts recognize the value of retaining customers for future visits and enticing customers to spend more with extremely targeted marketing while on the property. Modern data scientists will facilitate the successful ROI optimization of these programs. They will help polish a business and turn it from ad-hoc educated guesswork to a disciplined mathematical optimization that achieves maximum long-term profits. Ultimately data science is not rocket science, but rather the careful identification of trends and patterns combined with a bit of applied math to optimize the business.

*Thomas is a Data Science Manager at Everi and has been with the firm for approximately four years. He helped create the Everi Digital department for online gaming and now works on a variety of FinTech and Gaming projects throughout the company. Before that he worked in financial markets for a start-up as a researcher in high frequency trading algorithms. He has a PhD and MS in computational applied mathematics from the University of Texas at Austin, an MS in applied physics from Columbia University, and a BS in physics also from the University of Texas at Austin.*

# 2021: WHAT'S MISSING, WHAT'S NEXT & WHAT'S MAKING A COMEBACK



**Serendipity (ser-en-dip-i-ty):** the faculty or phenomenon of finding valuable or agreeable things not sought for.

I've always loved this word. For some reason it (and its adjective form serendipitous) feels good to say out loud, and the meaning closely mirrors: chance, fate, luck. Who doesn't want more of that in their life? Why does this matter to the readers of G&L? In my mind, it's what happens when we are physically in the workplace and not remote. It's what happens when we meet for cocktails or head out on the golf course. It's what happens when we meet someone new at a conference or tradeshow. It's what happens when we all get together – in person. It's what's missing when we are on our laptops, "efficiently, effectively and securely" still getting the job done in our jammies at home instead of doing all of what I previously mentioned above.

Don't get me wrong, it has been absolutely necessary to take a pause this past year

and thank goodness for technology to get us all through it. In 2020 and still even into 2021 for some, tribal casinos shut down for a period of time. But for the most part, IT departments did not. Moving to and supporting a remote workforce in an instant was required. Tribal governments still needed to operate to support critical membership services. Every single meeting became a video interaction both internally for operations and externally with vendors and providers. And industry events, like our very own TribalNet Conference, pivoted to fully virtual and didn't miss the opportunity to keep everyone connected in the only way we could in 2020. But while we have all been doing our best to make it through this past year, we CAN'T settle for this to be "the new norm." We NEED and are missing those serendipitous occasions where things just "happen" when different people, minds and personalities get together, all in the same space.

While we definitely can and have seen success at "virtual everything," so many people agree that it's just not the same. The smells from your parent's kitchen on a holiday don't

travel through FaceTime. Running a virtual 5K by yourself and logging it online isn't quite the same as doing it with your daughter and her entire school. Sipping wine during a virtual happy hour staring at your peers on a computer screen and taking turns unmuting to talk makes it harder to build new professional, long-lasting relationships. Toasting your glasses together, listening to a really great story and hearing everyone laugh...at the same time – that's hard to replicate on Zoom. Yet, we still have had to try. We all continue to find new ways to thrive and have definitely broken some pretty big boundaries along the way. But still...serendipity...it's missing.

Here we are over a year into this pandemic. Business and operations are still adapting, people are still at varying levels of comfort (or anxiety), and most of us are still wondering what's to come. But, read that last sentence again and think in your mind that it's 2012 or 2007 or 1996 or 1985. Couldn't you say the same exact thing? Of course these are "unprecedented times." Forgive me for saying that insanely overused phrase. I'm not trying to be dismissive or minimize what we've been

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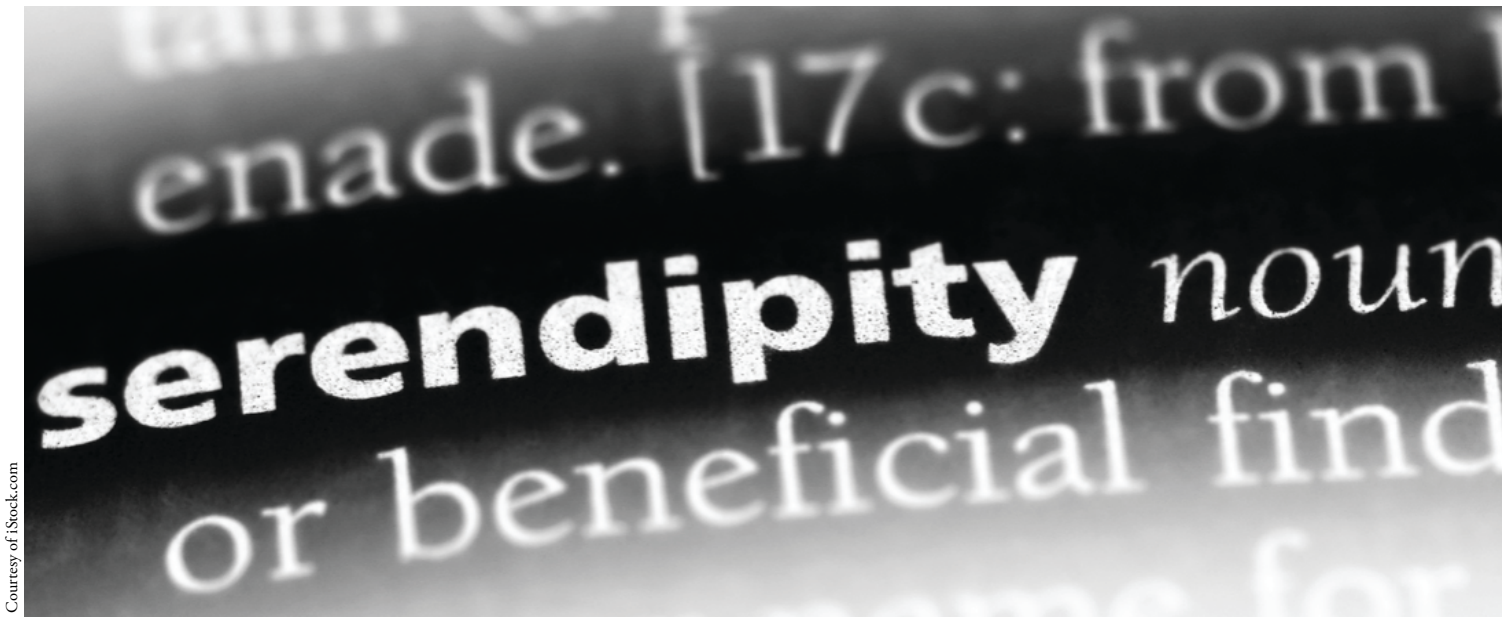
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through/are going through. But, never in our lives can we ever stop change. We shouldn't try. What we can do, however, is control how we react to it.

So, what's next? The reality is, you choose. I choose to believe it's more stories of perseverance, positive thinking, groundbreaking construction, innovation, and new and cool things. More headlines like, "Sky River breaks ground on new \$500 million casino resort," "Cache Creek completes \$180 million hotel expansion," "Comanche Nation breaks ground on a new casino," "Eagle Mountain Casino breaks ground on new casino, hotel and entertainment center," "Thunder Valley Casino breaks ground on a \$100 million concert venue," "Wild Horse Pass Hotel & Casino plans to open a \$143 million expansion later this year," and, "Virgin Hotels, the first casino in Las Vegas to be managed by a Native American tribe, the Mohegan Tribe of Indians of Connecticut, opened its doors." All of which by the way are real and recent headlines of 2021.

I applaud every single tribal property that's taking as many steps as possible to ensure the safety of their team and guests all while resuming business to support and sustain the programs necessary for tribal members and communities. For those tribes that are seeking or investing in new ventures for growth that helps provide more opportunities for their tribal communities and provides critical services to their members, don't stop. Be a trailblazer, lead the way and show others

who are still searching for what's next...what IS possible.

We've talked about what's missing and what's next in 2021, and what I want to wrap this up with is, what's making a comeback. Other than the crop tops and high waisted jeans I wore in the 90s, I am going to go out on a limb to say that PEOPLE are what's making a comeback. Personally and professionally, people are becoming themselves again. I absolutely loved listening to Sheila Morago, Executive Director of Oklahoma Indian Gaming Association, OIGA, in a recent video on LinkedIn by Tino Magnatta, Host of Casino Update, enthusiastically talk about OIGA being in person in 2021. I whole-heartedly share that enthusiasm. The TribalHub team is heading to Las Vegas in July for NIGA and, we really look forward to seeing some old friends and new faces at that event in person. The TribalNet team and advisory boards are already working hard to plan a valuable, informative, action-packed, safe, fun and memorable 22nd Annual TribalNet Conference and Tradeshow, November 8-11, 2021, at the Gaylord Texan in Grapevine, Texas, not far from the Dallas airport. We've even selected our MC for this year's event, Dr. James Stallcup ("aka Jimmy Joe Coltrane"), Enterprise CMIO and Medical Director at Cherokee Nation. Not only has he been a HUGE part of Cherokee Nation's tele-health program and response to COVID-19, he is an insanely funny and talented guy who is going to truly elevate the in-person experience for

our attendees this year. I'll leave you with my favorite line from his recent YouTube video that can be found/played from TribalNet's digital Spring magazine. He says, "TribalNet 2021 is in person and you know why? Because the VIBES ARE BACK."

VIBES. Maybe that's what's been missing. I may have just found my new favorite word.

Until next time, congrats to Jeannie, John, April and the whole crew on an anniversary year in 2021. Thanks for welcoming myself and so many others to the fam over the years. Cheers! I hope to see you all soon!

*Shannon Bouschor has been with TribalNet since 2004 and is the current Executive Director. She is responsible for the direction and overall execution of TribalNet's services including their; membership, conference, symposium, magazine and other divisions. Bouschor is the coordinator for TribalNet's boards and committees and is responsible for the collaboration with strategic industry partners. She has been a contributing writer periodically for TribalNet's media partner G&L over the last ten years. TribalNet is an industry resource for technology minded professionals at tribal organizations and enterprises along with the vendors providing products and solutions to this market. She welcomes the opportunity to make a connection with you via LinkedIn or email at: shannonb@tribalnetonline.com.*

# TAKING A GAMBLE ON THE GREAT OUTDOORS: SHATTERING THE DARK BOX



It's no secret that the gaming industry, like so many others, is grappling with a host of operational changes strong-armed by the COVID-19 pandemic. In a moment where people are acutely aware of how close their surroundings are and how tactile daily life is, the question we must ask is how casino developments will adapt to increased biophilia—in other words, our innate desire to connect with nature. Casinos have trailed far behind the rest of the hospitality industry when it comes to blurring the line between the built environment and nature, and our current situation is propelling this lagging initiative. But how easy will it be to steer from the path that has led casinos to become a dark box typology? Many designers are now working with clients across the gaming and entertainment markets to proactively incorporate the natural environment into these experience-centric developments.

## Biophilic Design: Connecting With the Natural World

The philosophy behind nature-inspired, or biophilic design, is simple: humans are fundamentally engineered to seek connections with the natural world. Historically, a global increase in urbanization has led to a massive rise in the desire for access to fresh air and green spaces—a trend that has skyrocketed since the onset of COVID-19. Casino developments, like many urban centers, are underutilizing their natural assets. This is as true for properties that are densely located, as it is for properties in remote destinations. By strategically harnessing the natural environment, we can create guest experiences that are more dynamic, more hospitable, and more compelling to the ever-diversifying casino guest. This is an exercise in expanding revenue streams and en-

couraging longer stays, while at the same time minimizing health risks.

While not a radical thought, it does require some tiptoeing. Casino design has always been driven by the ability to capture the hyperfocus of its guest. It is a peculiar and beautiful marriage between over-stimulation and intentful concentration. It is about harnessing the art of anticipation, which in part relies on the dismissal of our simpler notions of cause and effect. There are gaming professionals who still rely on the ability to confuse and disorient, but thankfully that is a shrinking mindset. As the market continues to become more sophisticated, experiences short of genuine are falling flat. What creates a loyal guest and keeps people in their seats is giving them an environment that is compelling, inspiring, and engaging. These are the types of spaces that make people want to spend hours upon hours of time there, not because we have tried to disorient their senses, but rather because we create spaces that people genuinely enjoy being in. While proven track-records often make their way into this argument, we must keep in mind how guest expectations have evolved in the hospitality market. Designers must keep in mind upcoming generations of gamblers, their tendencies toward authentic experiences, and their propensity toward spaces that have a dialogue with nature.

## Impactful Experiences: Four Potential Strategies

Accelerating our commitment to architecture that promotes wellbeing results in doubling-down on creating emotionally impactful experiences. Whether more dynamic, more comfortable, or more freeing, the casino experience has always been about more. We can get more from the assets that we already have access to. There are four primary strategies in embracing this concept: programming outdoor spaces, bringing nature indoors, the

use of natural materials, and introducing daylight and multidirectional outdoor views.

The programming of outdoor spaces is not virgin territory for casino resorts. Over time we have seen pools transform to day clubs and nightclubs, ballrooms bleed out onto event lawns, restaurants pour out onto sidewalks, and spas take over rooftops. We have even seen guest room balconies appear on the skyline, albeit far and few between. While we have seen peripheral gaming on pool decks happening since before the popularity of color photography, now in the throes of a pandemic we are seeing an earnest attempt to capture outdoor space for gaming. The industry has gained momentum for capturing and monetizing its natural assets, a trend that is soon to grow out of its infancy.

When it comes to bringing nature indoors, there has been no shortage of tropical themes adorning the industry. It has always been one of the easiest routes to escapism. Lush and lively designs with palettes of natural and unnatural flora have often been used to transplant the guest to some far away refuge. Around the turn of the century the industry saw this brought to greater sophistication, and it was greeted with remarkable success. Since then, we have seen retail promenades lush with life, conservatories taking center stage, buffets that could be mistaken for botanical gardens, and high-limit rooms primed for garden tours. Although opulent and overstated, these experiences find a welcome and natural home, and should spur inspiration toward the impact the presence of nature can have on indoor experiences.

Further enhancing this connectivity with nature is the strategy of using natural materials. Surfaces that guests come in contact with have an extraordinary impact on how the guest interacts with that space, and the emotional conversation that space has with the guest. In spaces that are intended to over-stimulate, the





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use of natural materials is often not an intuitive choice. While great focus has been attributed to a guest’s digital interaction with a space, a more natural and intrinsic interaction that is driven by materiality is too often overlooked.

Finally, what has become the most divisive proposition is natural daylight on the gaming floor. From the time the sun appears to hit the horizon it takes approximately 150 to 200 seconds to fully set. It is this brief window of time that some gaming floor veterans see as the moment of truth, the moment that environmental psychology takes over, allowing gamblers to be cognizant of just how long they have been on the floor. Through the art of interactive design, the anxiety over these two minutes is disposable. The concern about glare is resolvable. The apprehension over it being a distraction is misplaced, and the thought of it inviting drive-by shootings is preposterous. It is long overdue that we allow the overwhelming benefits of natural daylight to coincide with, and enhance, the pleasure-seeking atmosphere of the casino.

**Looking to the Future: Enriching the Casino Floor**

Think of the “glamping” trend that we have seen take the hospitality industry by storm in the last decade. Although an extreme example, it dissolves the barrier between luxury and nature. Being inspired by this type of thinking as we approach the design of more traditional travel destinations, casino developers can create enclaves of experience that enhance a sense of place and promote the urge to discover, balancing the intensity of the gaming floor with peaceful oases on the peripheral of the action. There are a multitude of ways that gaming designers and developers can take advantage of these trends that we are already seeing

implemented in luxury destinations worldwide.

Out of necessity the current pandemic has pushed us outdoors. Our physical and emotional well-being has depended on it. As an industry, we have an opportunity to face this moment with visionary leadership for post-pandemic change. This industry has no shortage of visionaries and is no stranger to change. At the core, we provide an architecture of persuasion, guest experiences that draw in the user and look to stimulate emotion and action. While we are an industry that has mastered the art of anticipation and adrenaline, we have now been presented with the catalyst to enrich this experience even further, with a sense of wellbeing.

*With 24 years of experience, Bob Gdowski, AIA is an entrepreneurial-minded Architect and planner, who excels within the cross-functional environments of luxury hospitality and mixed-use development industries. Spending the majority of his career in Las Vegas and Asia, he has collaborated with a diverse range of international hotel operators including: Four Seasons, Starwood, Marriott, Hilton, Atlantis and Caesars Entertainment. Bob is a seasoned leader who combines a strong team-building mentality and exceptional leadership skills with international experience and a passion for collective success. His appetite for experiential design is complemented by his commitment to making these bespoke guest experiences monetizable. Bob is a member of Urban Land Institute and has been certified by the National Council of Architectural Registration Boards. He earned a Bachelor of Architecture and a Master in Planning from the University of Southern California.*



# TRIBALNET 2021

22<sup>ND</sup> ANNUAL

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GAYLORD TEXAN RESORT & CONVENTION CENTER

Over the past two decades, TribalNet has grown to be THE platform to connect and seek opportunities in solutions, best practices and technology among **tribal gaming, government and health.**



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# G&L COMMUNITY PRODUCTS, SERVICES, & CLIENT BASE

## Agilysys

### POINT-OF-SALE TECHNOLOGY

IG Flex – Server – facing mobile POS  
 IG Buy – Self-service kiosk POS  
 IG Smart Menu – Mobile device menus  
 IG Quick Pay – Mobile payment  
 IG OnDemand – Mobile F&B ordering  
 IG KDS – Kitchen display system  
 IG Digital Menu Board – Live menu displays  
 Agilysys Seat – Reservation/table management

### PROPERTY MANAGEMENT TECHNOLOGY

Agilysys LMS - PMS  
 Agilysys Visual One- PMS  
 Agilysys Stay - PMS  
 Agilysys Golf – Course management  
 Agilysys Spa – Spa management  
 Agilysys Sales & Catering – Event management  
 Agilysys Retail – Retail POS  
 rGuest Book – Online reservations  
 rGuest Express – Mobile check-in/out  
 rGuest Service – Task management & SMS

### OPERATIONS & ENGAGEMENT TECHNOLOGY

Agilysys Pay – Secure payment gateway  
 Agilysys Authorize – 3rd party payments  
 Agilysys Eatec – Inventory & procurement  
 Agilysys SWS - Inventory & procurement  
 Agilysys Engage – Loyalty, promo, membership  
 Agilysys Digital Marketing – Marketing automation  
 Agilysys Analyze – Hospitality business intelligence  
 Agilysys DataMagine – Document management

### CLIENT BASE

Bogata Hotel Casino & Spa  
 Boyd Gaming Corporation  
 Caesars Entertainment  
 Cannery Casino Resorts  
 Chickasaw Nation  
 Comanche Nation of Oklahoma  
 Cypress Bayou Casino Hotel  
 El Cortez Hotel and Casino  
 Golden Nugget Lake Charles  
 Grand Casino Mille Lacs & Grand Casino Hinckley  
 Grand Sierra Resort and Casino  
 Hard Rock Hotel & Casino Las Vegas  
 KwaTaqNuk Resort and Casino  
 M Resort Spa Casino  
 Mohegan Sun  
 Odawa Casino Resort  
 Penn National Gaming  
 Sands Casino Resort Bethlehem  
 Saratoga Casino and Raceway  
 Spirit Lake Casino & Resort  
 Station Casinos  
 The Cosmopolitan of Las Vegas  
 Treasure Island Hotel & Casino

## Applied Analysis

### PRODUCTS OFFERED

Market research and analysis (gaming and non-gaming)  
 Market and financial feasibility analyses  
 Economic and fiscal impact analyses  
 Consumer sentiment surveys and analysis  
 Demographic analysis and segmentation  
 Financial analysis  
 Public policy analysis

### CLIENT BASE

Association of Gaming Equipment and Manufacturers (AGEM)  
 Boyd Gaming Corporation  
 Caesars Entertainment  
 CityCenter  
 Herbst Gaming  
 Las Vegas Convention & Visitors Authority

## Big Green IT

### SERVICES OFFERED

ure Strategy & Planning  
 Office 365 Assessment  
 Office 365 Migration Planning & Execution  
 Cloud Security Solutios  
 AT Assessment  
 Azure Backup and Recovery

### CLIENT BASE

Red Hawk Casino  
 the D  
 In-Shape  
 E&J Gallo Winery  
 ProSearch Strategies  
 Tahoe Forest Health System

## Cendyn

### PRODUCTS OFFERED

GuestREV  
 GroupREV

### CLIENT BASE

Atlantis, Paradise Island  
 Atlantis, The Palm Dubai  
 Baha Mar  
 Borgata Hotel Casino & Spa  
 Caesars Entertainment  
 Foxwoods Resort Casino  
 Hard Rock Hotel & Casino  
 Hollywood Casino Tunica  
 IP Casino Resort Spa  
 Isle of Capri Casinos  
 Kerzner International

MGM Resorts International  
 Mohegan Sun Omni Hotels & Resorts  
 Pinnacle Entertainment  
 Seminole Hard Rock Hotel & Casino  
 Seneca Niagara Casino & Hotel  
 The Cosmopolitan of Las Vegas  
 Tropicana Treasure Island Las Vegas  
 Wynn Las Vegas

## eConnect

### PRODUCTS OFFERED

POS Connect™  
 For Micros & InfoGenesis  
 Casino Connect™  
 Table Games – TITO – Cage  
 Slots – Credit – Bingo  
 eCounter™  
 People Counting  
 LiveAnalyst™  
 Remote investigations and data analysis team

### CLIENT BASE

Ark Restaurant Group  
 Caesars Entertainment Cedar Fair LLC  
 Cosmopolitan of Las Vegas Pechanga  
 Penn National Gaming Potawatomi  
 Stations Casinos Thunder Valley

## 5P Consulting

### SERVICES OFFERED

Business Operations Excellence  
 Technology Solutions & Services  
 Data Reporting & Analytics

### CLIENT BASE

Alere  
 Buffini & Company \* Quidel  
 Ignite Visibility

## Infor Hospitality Solutions

### PRODUCTS OFFERED

Financial Management  
 Performance Management  
 Human Capital Management  
 Enterprise Asset Management  
 Central Reservation Management  
 Customer Relationship Management  
 Property Management  
 Revenue Management

## KPMG

### KEY PRODUCTS & SERVICES

Accounting advisory  
 Anti-money laundering

Artificial intelligence  
Automation  
Blockchain  
Construction advisory  
Customer service transformation  
Customer strategy and growth  
Cybersecurity  
Data and analytics  
Digital payments  
Digital transformation  
Dispute advisory  
Enterprise risk management  
Financial due diligence  
Financial statement audit  
Global, federal, state and local tax planning and compliance  
Human resources and talent management  
Internal audit  
Internet of Things (IoT)  
Loyalty programs  
Mergers and acquisitions  
People and change  
Responsible gaming  
Smart venues  
Smart venues  
Tax planning and compliance  
Tax technology  
Transformation (HR, Finance, Procurement, IT)  
Valuation and financial modeling

**Link Technologies**

**PRODUCTS OFFERED**

Information Assurance and Governance  
IT Compliance and Risk Management  
Infrastructure Services  
IT Solutions and Services  
Project Management and Integration  
Science and Engineering Solutions  
Strategic Placement  
Outsourcing  
Professional Staffing

**CLIENT BASE**

Caesars Entertainment  
Diamond Resorts International  
Hard Rock Hotel & Casino  
MGM Resorts International  
Navajo Nation  
Pinnacle Entertainment  
Resorts International  
Sahara Hotel and Casino  
Symantec Corporation  
The Cosmopolitan of Las Vegas

**Omnico Group**

**PRODUCTS OFFERED**  
omniRun  
omniEngage  
omniEnable  
omniStock  
omniBasket

**Playersoft Technologies**

**PRODUCTS OFFERED**  
Host Player Management  
Mobile Players Club Enrollment  
Group Manager  
Promotional Kiosk  
Mobile Ticket Redemption  
One Card Hotel Guest Signup  
Custom Software Design

**CLIENT BASE**

Atlantis Bahamas  
Colusa CasinoResort  
Chumash Casino  
Downtown Grand  
Fantasy Springs  
FireKeepers  
Gun Lake Casino  
Hard Rock Hotels & Casinos  
Jacobs Entertainment  
Westgate Hotel & Casino  
Margaritaville  
MGM Resorts  
Morongo Casino  
Palms Las Vegas  
Red Hawk Casino  
Rocky Gap Casino Resort  
Sands Bethlehem  
Seneca Niagara Casino  
Seneca Buffalo Creek  
Seneca Allegany  
Sycuan  
Tachi Palace  
Turning Stone Resort Casino  
The Venetian & Palazzo  
Thunder Valley  
Valley View  
Wynn

**Solutions II**

**SERVICES OFFERED**  
Business Continuity Solutions  
Virtualization Solutions  
Data Lifecycle Management Solutions  
Architecture Services  
Datacenter Services  
Storage Implementation Services  
Virtualization Services  
Backup and Recovery Services  
Network Services  
Project Management  
Staff Augmentation  
Managed Backup and Recovery Services  
Managed Storage Services  
Managed Platform Services  
Managed Network Services  
Managed Voice Services  
Managed Power System i  
Managed Service Desk  
Security Assessment Services  
Risk and Compliance Services  
Incident Response Services  
Security Advisory Services  
Security Managed Services  
Security Monitoring and Alerting Service  
Threat Intelligence Service  
Security Device Management Service

**Signature Systems, Inc.**

**SERVICES OFFERED**  
All-in-One POS \* Mobile POS  
Self-serve kiosk POS  
Natively integrated digital menu boards  
Natively integrated Enterprise reporting app  
Natively integrated "In-Place Dining" app  
Natively integrated online ordering  
Natively integrated text-overlay camera  
Natively integrated kitchen display system (KDS)  
Data & cyber security platform  
Seamless 3rd party integrations w/full project mgmt  
RESTful APIs  
24x7x365 support, --  
on-demand menu updates

**Sonifi**

**SERVICES OFFERED**  
In-room entertainment  
Property promotions  
Guest services  
Conference services  
Wi-Fi  
Safety buttons  
Streaming  
Voice assistants  
Integrations



**TCI**

**PRODUCTS OFFERED**

Infinium Software Services  
 Cognos C8, Finance, and Planning Services  
 Infinium Software Sales  
 AS/400 Services

**VizExplorer**

**PRODUCTS OFFERED**

floorViz™  
 campaignViz™  
 hostViz™  
 techViz™

**CLIENT BASE**

Jack Entertainment  
 Mystic Lake  
 Morongo Casino



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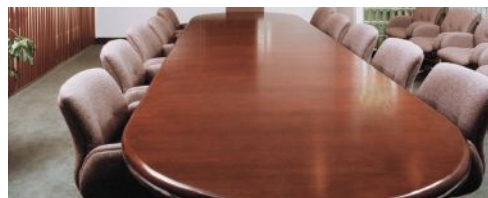
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**Agilysys...**

Agilysys is a leading developer and marketer of proprietary enterprise software, services and solutions to the hospitality industry. The company specializes in market-leading point-of-sale, property management, inventory & procurement, workforce management analytics and mobile & wireless solutions that are designed to streamline operations, improve efficiency and enhance the guest experience. Agilysys serves casinos, resorts, hotels, food-service venues, stadiums and cruise lines. Agilysys' innovative technology solutions go hand-in-hand with service that's second to none. Whether you're serving hundreds of guests or thousands at a time, you succeed in hospitality because you know the value of a single relationship. So do we. We can help you forge those relationships with your guests. We understand that you're more than a gaming operation. You're a restaurant, an entertainment venue, a hotel, and perhaps a full-service family vacation destination. For you, success isn't about playing the odds: It's about making the most of every revenue source. In a technology marketplace cluttered with products that promise to streamline casino resort operations, Agilysys stays ahead of the game. We're the one resource you need for integrated solutions that power sound operations, intelligent guest service, and the most efficient use of your employees' time. We operate extensively throughout North America, Europe and Asia, with corporate services located in Alpharetta, GA, and offices in Singapore, Hong Kong and Malaysia.

For more information, contact:  
 877.369.6208  
 sales@agilysys.com  
 www.agilysys.com



**APPLIED ANALYSIS**



Applied Analysis is a Nevada-based advisory services firm founded in 1997. We are an information and analysis resource for both the public and private sectors. Our team has extensive experience in gaming, hospitality, economics, market analysis, information technology and finance. We apply this knowledge in an effort to develop creative solutions to our clients challenges.

Our team has performed analyses in a number of jurisdictions, servicing a broad spectrum of business clients, from governmental agencies to gaming operators. Our areas of focus include the following:

- Economic Analysis
- Financial Analysis/Advisory Services
- Hospitality/Gaming Consulting
- Information Technology/ Web-based Solutions
- Litigation Support/Expert Analysis
- Market Analysis
- Opinion Polling/Consumer Sentiment Analysis
- Public Policy Analysis

Our vision and goals have been the same since our inception. We strive to provide superior advisory services through a better understanding of our clients and their issues. We obtain this superior understanding through listening closely to our clients' needs and designing solutions that take into account their unique nature, circumstances and requirements.

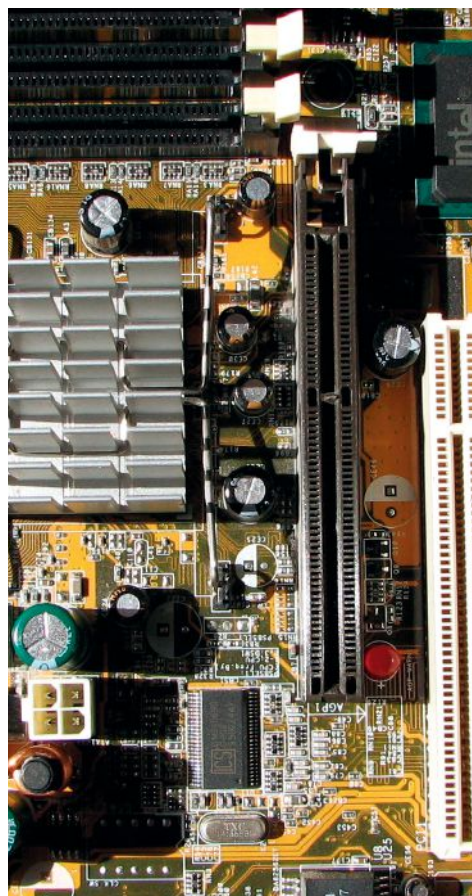
To put it simply, we are a solutions resource. Our future is branded by the success of our clients and the quality of our professionals. Our commitment lies therein.



**CYVATAR<sup>AI</sup>**

Cyvatar is the industry's first membership-based, cybersecurity-as-a-service (CSaaS) company, empowering members to achieve successful outcomes by providing expert advisors, proven technologies, and a strategic process roadmap to guarantee results that map to their business drivers. Our approach is rooted in proprietary ICARM (installation, configuration, assessment, remediation, maintenance) methodology for better, faster security compliance and cyber-attack protection at a fixed monthly price. And because we're a subscription, members can cancel anytime. Cyvatar is headquartered in Irvine, California with locations around the world.

Begin your journey to security confidence at <https://cyvatar.ai/> and follow us on LinkedIn and Twitter.



**DRUVSTAR**

You have a business to manage and grow and you're good at it, but cyberthreats are a growing distraction. Our business is cybersecurity, and we can really help. In addition, we have over 100 years of combined gaming industry experience. We understand both the threat and regulatory environments and use our capabilities to ensure that your business is not interrupted by cyber-criminals. We are uniquely positioned to solve your cybersecurity concerns. While you're building your organization, we'll be patrolling your critical systems 24 hours per day, 365 days per year.

In a world of modern security threats, you need modern security solutions. DruvStar's Managed Detection and Response service takes you into a modern world where you have a proactive enterprise grade security presence across all environments irrespective of your team's size or capabilities.

Staffed by industry tested & certified SOC professionals, we leverage Enterprise level SIEM technology to identify and combat security threats. We evaluate all events, investigate all incidents, and quickly detect and collaborate to halt attacks - greatly minimizing impact. We continually acquire and apply the latest threat intelligence to hunt down threat activity and meet with your team frequently to ensure close collaboration and a continually refined environment.

We provide:

- Cybersecurity
- Threat Management
- MDR
- SIEM
- Penetration Testing
- Dynamic Application Security Testing
- Training
- Compliance Reporting

For more information contact:

Michael Coppert  
 mcoppert@druvstar.com  
 702-427-4579  
<https://druvstar.com>





eConnect incorporated in 2009 and has over 350 customers worldwide. We serve many industries, including gaming, hospitality, manufacturing, government, entertainment, distribution, technology, and more.

We provide operators with an intuitive platform to drive automation, safety, security, efficiency, and profitability. We deploy award-winning software paired with smart devices to optimize business operations. Our platform is well known for providing actionable analytics to help businesses run optimally and deliver tangible results every day.

Our mission is to deliver excellent products and services that exceed expectations and make your operation better than it was before we arrived.



5P transforms your business processes into digital solutions. We do business smarter through People, Process, Products, P&L, with Priorities. We are small enough to provide personal attention and responsiveness, and large enough to have the tools and resources to identify quick wins for actionable results while putting a plan in place for long-term impactful improvements.

A list of key products & services:

**BUSINESS ARCHITECTURE SOLUTIONS**  
Maximize efficiency using the latest digital solutions & processes. A trusted advisor. Strategy to Execution, Process Re-design & Implementation.

**DATA ARCHITECTURE SOLUTIONS**  
Improve your data strategy based on proven processes and tools. Platform Strategy, Implementation & Customization, Automation & Integration, Innovative Builds (Cloud, AI, RPA)

**CLOUD INFRASTRUCTURE SOLUTIONS**  
vCIO services, Implementation & Customization of Cloud and SaaS business solutions.



**What is the Gaming & Hospitality Research Center (GHRC)?**

The GHRC is an online repository of vendor and product research that will help make your technology purchasing decisions faster and more informed using unbiased research coupled with a customizable tool. This research is constructed using Info-Tech Research Groups unbiased and proven research methodology and is targeted to the specific need of the gaming and hospitality industry a first ever of its kind.

Within the GHRC you will find gaming and hospitality vendor landscapes. Vendor landscapes are designed to provide an indepth picture of what to look for in your systems and where each vendor and their product(s) rank within the industry. In addition, your membership in the GHRC supports the creation of additional planned vendor landscapes. Best of all, as a member you have a voice in the future vendor and product research schedule.

*I am a vendor, can I join the GHRC?*

Absolutely! There's no better way to see first-hand how you rank against your competition and how the industry evaluates your product quality. The GHRC contains information that your current and potential customers will be reviewing, so it makes sense that you should have access to it as well. The analysis provided is based on primary research with current users and vendor interviews along with publicly available information. The very information executives endlessly try to compile in an apples-to-apples format when they are evaluating you against your competition during an RFP process.





Make better decision faster with Infor Hospitality, a technology partner who understands the industry and can deliver innovative solutions to meet your business needs.

With a fully integrated suite of financial and operations applications deployable in the cloud or on-premise, Infor hospitality solutions let your employees focus on enhancing guest service and improving your bottom line. Decrease costs, raise profits, grow your business, and build the loyalty that keeps guests coming back for more.

Today more than 20,000 hospitality properties worldwide – including some of the worlds most recognizable hotels, resorts and gaming facilities – use Infor Hospitality software to improve guest experience and become more profitable. You can be one of them.



**Who is Key Consulting Software?**

We are “on-shore” IT professionals specializing in Gaming & Hospitality. For over 20 years, we have provided unparalleled expertise in both Front of the House and Back of the House application software.

We can assist your IT department with the following:

- Install, train, and modify Infinium software (HR, PY, FA, GL, IR, PL, TR, GT)
- Interface/Modify several common gaming related apps such as: LMS, MMS, CMS, SDS, ATI, ACSC, Micros, Infogenesis, etc.
- Design, code, & implement custom software
- Project management
- Open, transition, or close properties
- Create SOX compliance procedures and documents
- Gap/Vendor analysis

We supply:

- Project managers
- System analysts
- Programmers
- SOX compliance experts

**Why use Key Consulting Software?**

We are gaming EXPERTS in IT... we know your lingo and don't need lengthy explanations on what a marker, safekeeping, or front money is. We understand theoretical win, comps, ratings, etc.

We are different than the large corporations because:

- We know gaming very well and are productive the first day
- We are reliable and reachable (if you call, you speak directly to us)
- We have low overhead so we pass that savings onto you with reasonable rates.

Contact us at 775-843-5397  
or [www.kcsoft.com](http://www.kcsoft.com)



At KPMG, we strive to provide astute and meaningful insights. Dedicated professionals in our gaming and hospitality practice approach business and industry issues from our clients' perspective to help them leverage emerging opportunities and overcome challenges. Our gaming network consists of professionals from varied disciplines ready to serve your needs whenever and wherever you are. Our goal is to help you create the future of gaming, now.

KPMG has a rich past in casino gaming, and we continue to grow our footprint in this important industry, including its emerging sectors such as online gaming and sports betting. In Europe, we are a recognized leader in responsible gaming, and audit several of the largest online gaming companies in the world. In the U.S., offices across the country serve casino gaming clients of all types: destination resorts, regional and local casinos, racinos, route operators, commercial and Tribal entities, and gaming technology suppliers.

KPMG leverages deep industry experience and understanding of the global forces driving change—as well as a broad functional perspective—to respond to the key business and performance challenges facing our public and private gaming and casino clients. Gaming organizations are challenged to take advantage of new opportunities while mitigating risks, meeting their business objectives and complying with regulators and other stakeholder expectations. Integral to their success is the balance of risks related to reputation, user authentication, privacy and security of sensitive information, and responsible gaming— all while simultaneously managing cost effective and efficient operations across disparate sites. KPMG understands this complex and heavily regulated environment enabling us to provide our clients excellence in service and relevant information needed to make informed decisions. We help our clients succeed by employing customer insights, capitalizing on emerging technologies, and delivering solutions using well-tested methodologies, all while keeping a sharp eye on financial reporting and tax implications, changing regulations and risk issues.





At Omnico, we offer solutions for destinations from single theme parks, water parks and heritage sites, to large-scale resorts that include attractions, hotels, spas, food and beverage and retail outlets, even golf courses and beaches.

We are the only vendor that provides a single, seamless platform for retail, loyalty, entitlements, ticketing, stock and food and beverage. This ensures a seamless and immersive visitor experience at the point-of-sale and throughout their interaction with the brand.

Omnico's solution portfolio is trusted by global retail operators on a daily basis and is routinely used to deal with huge volumes of critical commercial information.

Our point-of-sale (POS) solutions allow store environments to speak to a single transaction and engagement engine to manage loyalty and promotions, source stock and complete the sale. This ensures a consistent and seamless experience for the customer, whichever channel they choose to use.

**A list of key products & services:**

- omniRun
- omniEngage
- omniEnable
- omniStock
- omniBasket



Playersoft Technologies develops software for the casino and hospitality industry. Our software products are the outcome of years of first-hand experience as Casino Operators implementing technology. Playersoft Technologies' core belief is in customer service. We believe that technology for technology's sake is just that, it's really of no use to anyone. But if we can build a software product that makes it easier for you to serve your guest and gives you the ability to provide your guest with the ultimate guest experience, then we achieve our goal.

**A list of key products & services:**

- Products Offered:
- Host Player Management
- One Card Rewards System
- Mobile Players Club Enrollment
- Group Manager
- RSVP Event Manager
- Promotional Kiosk
- ePlayer360 Data Warehouse

**A list of key clients:**

Atlantis Bahamas, Agua Caliente Casinos, del Lago Resort & Casino, Desert Diamond Casinos, Encore Boston Harbor, Fantasy Springs, French Lick Resort, Firekeepers Casino & Hotel, Grand Sierra Resort, Graton Casino & Resort, Gun Lake Casino, Hard Rock Hotels & Casino, Jacobs Entertainment, Jamul Casinos, MGM Resorts, Morongo Casinos, Oceans Resort, Red Hawk Casino, Resorts World Catskills, San Manuel Casino, Seneca Casinos, Sycuan Resort & Casino, The D, The Venetian & Palazzo, Thunder Valley, WinStar World Resort & Casino, Wynn Las Vegas



Signature Systems, Inc., a multi-award-winning technology solutions innovator, has been a leader in developing and implementing comprehensive, compliant, and cost-effective products and services for over 34 years. Its signature product—SSI POS—is a top rated, all-concept point of sale system. Combined with PDQ Security®, an acclaimed cyber security platform, the all-encompassing PCI compliant solution has helped its ever-growing customer base save time, effort, and costs (including labor); increase orders and ticket amounts; and uphold customer brand by preventing costly, reputation-damaging breaches and other types of cyber crime.

SSI differentiates itself from other providers in three key areas:

- All-In-One, Synchronous Solutions
- All-In-House, Domestic Teams, including transparent Development & responsive Support
- All-In-Accountability for issue resolution

**A list of key products & services:**

- All-in-One POS
- Mobile POS
- Self-serve kiosk POS
- Natively integrated digital menu boards
- Natively integrated Enterprise reporting app
- Natively integrated "In-Place Dining" app
- Natively integrated online ordering
- Natively integrated text-overlay camera system
- Natively integrated kitchen display system (KDS)
- Data & cyber security platform
- Seamless 3rd party integrations w/full project mgmt
- RESTful APIs
- 24x7x365 support, on-demand menu updates



# Solutions II

Solutions II assists clients every day, to leverage technologies and services that drive the cost out of IT. Founded in 1992, the experienced team holds 200+ certifications dedicated to our pillars of excellence in Security, Business Continuity, Virtualization and Data Lifecycle Management. Solutions II is also a comprehensive Infrastructure as a Service (IaaS) provider with an award-winning services team ready to take on any challenge.

### Why Solutions II?

Passion, Integrity and Quality in our Commitment to our Clients, Partners and Employees.

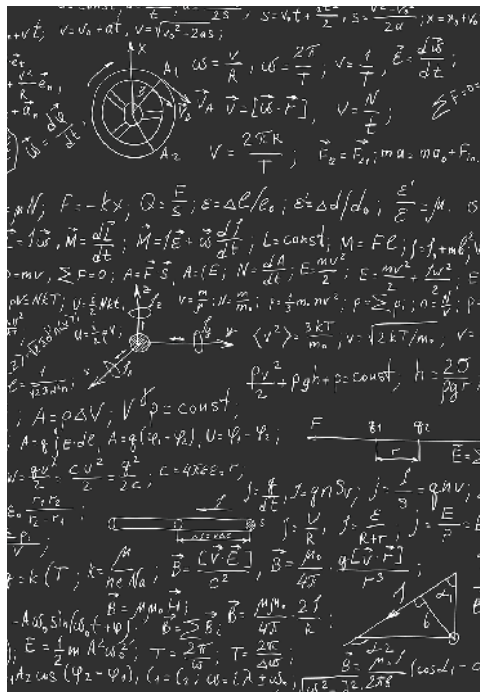
Solutions II applies these attributes in ever project, relationship and interaction our team has with our clients and partners.

### Account Service & Support

Solutions II is considered by our clients as an extension of their team. We demonstrate teamwork through collaboration.

### Strategic Partnerships

Solutions II only partners with proven companies to ensure we deliver best-of-breed solutions that accomplish your IT and business goals.



# VPS

TECHNOLOGY PROCUREMENT  
ANALYTICS & PROCESSES

Scott Robins started his career in technology sales for a value-added reseller, and quickly rose to the top of each sales team he worked for. While always looking for creative ways to deliver more value to his customers, Robins suggested to a client that he could recover money already spent and use this to fund a new acquisition. Upon finding success with this approach, Robins stepped away from his sales role, knowing he could do much more for companies if he focused and refined this new business model.

In 2009, Mr. Robins founded Virtual Procurement Services with the sole purpose of providing two services:

- Recovering money previously spent in and around the datacenter, and
- Reducing costs for net/new technology purchases.

Unlike traditional buying services or Group Purchasing Organizations (GPO's), VPS's success is grounded on knowing the manufacturers and publishers fully burdened costs throughout distribution. These costs are derived by VPS's proprietary predictive analytics tool, the Virtual Vendor Index (VVI™). VVI leverages 21 critical pricing criteria data-points, and it is continually updated to capture the ever-changing price of technology today. As importantly, VPS has visibility into the complex vendor pricing programs and discount pools, and the keen insight on how to leverage that to achieve savings on behalf of our gaming clients.



# GAMING & LEISURE

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**Darren Student**

6775 Edmond Street, Suite 100  
Las Vegas, NV 89118  
702-759-4729 (O) 702-280-7661 (C)  
darren.student@agilysys.com  
www.agilysys.com

**SERVICES:** Agilysys develops industry- leading hospitality software solutions to improve guest recruitment, transform the guest experience, and increase guest spending. Our property management systems, point-of-sale, inventory and procurement, activities, document management and workforce management solutions, professional services and 24/7 support all serve to help you create lasting connections with your guests.



**Edward Preston**

530 Technology Drive, Suite 100  
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4	6,208	Pechanga Resort & Casino	Temecula	California	United States
5	6,168	Crown Melbourne	Melbourne	Victoria	Australia
6	6,000	Casino de Genting	Genting Highlands	Pahang	Malaysia
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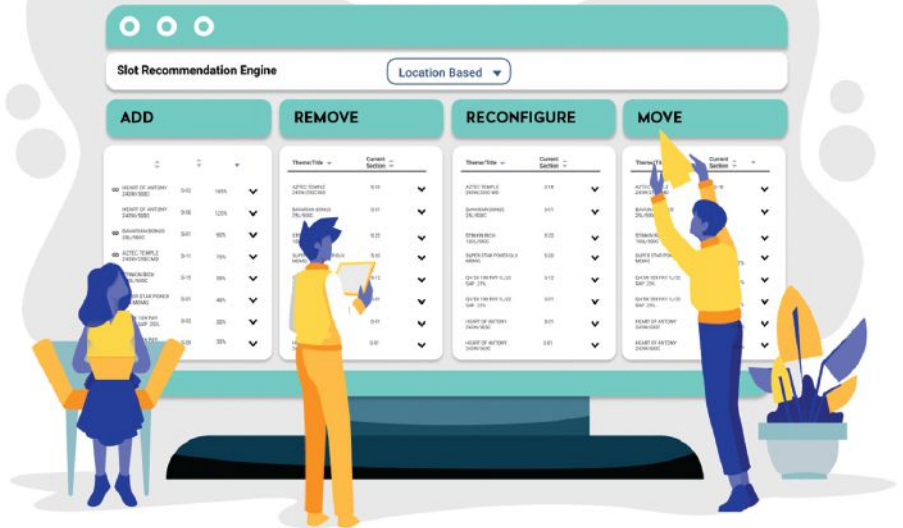
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