

Global Gaming Business Magazine

GGB

March 2020 • Vol. 19 • No. 3 • \$10

RG TECHNOLOGY
ALCOHOL BEST PRACTICES
SCHUETZ'S TALKING HEADS
MACAU'S JAY CHUN

Asian Influence

Why Chinese
gamblers are the
key to success
in the region

**Esports &
Casinos**
Future or folly?

SPECIAL SECTIONS

- Responsible Gaming
- Security and Surveillance

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The China Effect

As the gaming industry in Macau continues to reel over the closings connected to the coronavirus, the larger Asian market contemplates the effect that the geopolitical state of the People's Republic of China has on the casino business in that part of the world, both bad and good, and look ahead to recovering from the latest crisis of the Asian gaming and hospitality business.

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Meeting of the Minds

By Roger Gros, Publisher



March is Responsible Gaming Month as recognized by many organizations around the world, particularly the National Council on Problem Gambling (NCPG). We know this is a crucial issue to the gaming industry. On the surface, it's a perception issue that has caused problems in many countries like Australia, Canada and the U.K. But drilling deeper, it's the commitment of the gaming industry into discovering the reasons why our product is so harmful to a very small minority of people, but most others can use it safely with few consequences.

And to be clear, there have been multiple independent studies done that prove that less than 1 percent of any population is at risk from severe problem gambling, 1 percent to 2 percent at risk from moderate problem gambling and 2 percent to 4 percent that have a slight problem with gambling. While that's not a lot of people in the scheme of things, I've always believed if there's even one person that is harmed by our products, that's one too many and we need to find a way to prevent that harm.

This month in our nod to Responsible Gaming Month, we offer several articles about problem gaming. Dave Waddell and his team at RMC provide an overview of where we are today with responsible gaming (RG), including the recently announced "Effectiveness Principles." Noted Australian RG researcher Sally Gainsbury and two of her colleagues discuss how subtle changes can reduce harm for potential problem gamblers.

And did you know there is a growing toolbox of RG technology designed to identify and help those afflicted with the illness? I didn't, so our Technology Department this month reviews some of the latest products that are beginning to make a difference.

Yes, I know RG isn't the sexiest topic to cover, but I do believe it is one of the most important. So expect to see GGB focus on RG throughout the year, not just in the month of March.

As our companion special section this month, we focus on Security & Surveillance. I've always said my friend Willy Allison's event, the World Gaming Protection Conference, is one of the most interesting in gaming because it focuses on things you usually don't see or even think about. WGPC is being held March 23-26 in Las Vegas, and always concentrates on issues that are equally important to

gaming—customer and employee safety, game protection and data security.

And speaking of conferences, I didn't realize how closely related security & surveillance and RG were until I went to a conference in January at the University of Nevada, Las Vegas (UNLV).

The session, "Artificial Intelligence, Biometrics and Big Data: An Analysis of Privacy Protections and Public Policy and Its Impact on Regulations," was put together by gaming attorney and professor Anthony Cabot and his colleagues at UNLV's Boyd School of Law. The intent was to focus on new technology and how it applies to the gaming industry in many ways—marketing, security, privacy and responsible gaming.

One of the speakers that day was Alan Feldman. Full disclosure, Alan and I go way back to the early Mirage days when he was first hired by Steve Wynn and I had previously worked for Wynn. After his long tenure at MGM as the public affairs spokesman, Alan has transformed himself as the industry sage on the most important issue facing the future of the industry, responsible gaming.

But when it comes to big data and AI, Alan only had questions, which we are far from answering. All his questions were relevant in light of RG. Certainly, technology can provide insights into player behavior.

But can it reveal the Holy Grail: every player, every bet, every time? And can technology predict player behavior? Can technology predict problem gaming? Can technology determine diagnosis? Does this technology violate data protection laws? Is this technology an invasion of privacy? And what are the unintended consequences? Because that's the elephant in the room. What action creates an unintended reaction? Who knows?

So as we approach an industry-wide effort to somehow make it easier to deposit or withdraw via app, e-wallet or even a simple credit or debit card, how can we make sure this technology is safe and easy to navigate for our players who enjoy gaming, but gives us an early warning when a player seems to veer off the tracks, headed to devastating results?

Like Alan Feldman, I have these same questions and trepidations. So let's figure it out so big data and AI can help to protect those at risk, and help the rest of us get the most out of our casino experience.

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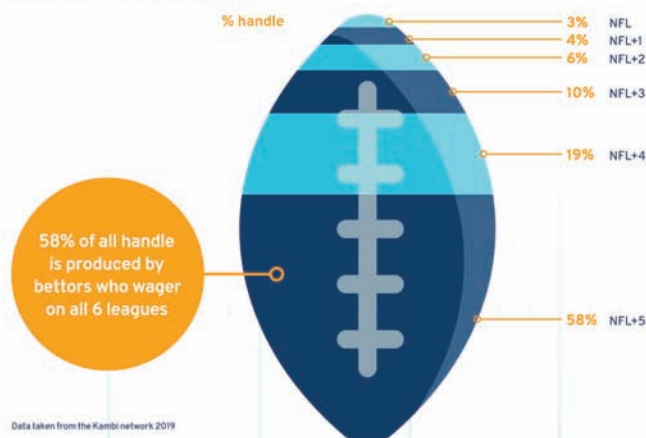


major sports leagues in the U.S. As the chart below shows, bettors moved on to wager on all six of the major sports leagues in addition to the NFL—NFL, NBA, NCAA football, NCAA basketball and Major League Baseball. The report, which includes breakdowns on contending teams and betting patterns surrounding the Super Bowl, can be accessed at Kambi.com.

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5 QUESTIONS

Kristian Nylen
CEO, Kambi



Kristian Nylen joined Sweden's Unibet in 2000, and a few years later was put in charge of the Unibet spinoff, Kambi, which focuses on B2B services for sportsbook operators. So when sports betting in the U.S. became legal in 2018, Kambi was well positioned to take advantage, and has become one of the most important technology partners for many U.S. operators. Nylen spoke with GGB Publisher Roger Gros at G2E in Las Vegas in October. To hear a full podcast of this interview, visit GGBMagazine.com.

GGB: How important was legalization of sports betting in the U.S. to Kambi?

Nylen: In Europe, online and mobile sports betting has been very prominent, and Kambi has two and a half decades of experience of working with operators there. Because of this experience, we were ready when the U.S. came online. That was always part of our plan when we formed Kambi back in 2003.

We have been developing the product over so many years, it gave us a big advantage over what has been available here in the U.S. The depth and the breadth of the products has been much bigger in the U.S. than anything another company offers.

What are some of the Kambi products in sports betting and what are the companies that you're working with?

We offer pricing and risk management, and we can build the front end of the sports betting site if that's what the owner wants. In many cases, the operators have us build the front end and the back end of their sites.

We have been very successful so far in the U.S. signing some very important clients. We of course have DraftKings and Rush Street Interactive, both of which have huge market access in the U.S. We have Parx in Pennsylvania. We have a couple of our European clients who have U.S. businesses, 888 and Kindred. We've signed Mohegan Sun and Jack Casinos from Ohio.

Of course, your biggest deal so far is with Penn National. Why is that so important for the company?

One of our big targets when we started was to get involved with one of the multi-state operators, and except for the DFS companies, Penn National was one of the most prominent. They took their time in making a decision, about two years. We were very fortunate that we had a good, strong track record in the U.S. and a strong credit. At the moment we're operating their sportsbooks in Indiana, Iowa and Pennsylvania.

As a European company, how long did it take you to understand American sports?

As a Scandinavian company, we've had lots of experience with ice hockey. Basketball has been very popular all across Europe for many years. And (American) football is growing massively in popularity in Europe. They're selling out the stadiums in London four times a year. So on all these sports, we've had a strong offering for a long, long time.

The big challenge for us in the U.S. was to understand more deeply the college sports. We've always covered the top colleges but to manage a local offering, we've got to go much deeper.

Obviously, the online/mobile market is the most lucrative, but you also handle retail sports betting. How does that work?

In states where mobile is not yet approved, we try to bring technology to the casino itself. We operate retail in Indiana, Iowa, New York, Pennsylvania and elsewhere. It's pretty much the same system we use for mobile, but one thing that has been very successful for us has been the self-service terminals. Since you don't have to go to a cashier, you can handle many more bettors at one time. We're also experimenting with a "bring your own device," which is more or less mobile, but limited to the casino property.

"They Said It"

"The members of the commission and staff of its secretariat will unite and work with a sense of urgency to build trust with the public over the casino business."

—**Michio Kitamura**, chairman of Japan's Casino Regulatory Commission, reassuring the public about the coming industry's integrity in the wake of a corruption scandal



CALENDAR

March 4-5: North American Regulators Roundtable, Tropicana Las Vegas. Produced by Gaming Laboratories International. For more information, visit GamingLabs.com.

March 6: Prague Gaming Summit 2020, Vienna House Andel's, Prague, Czech Republic. Produced by European Gaming Media and Events. For more information, visit praguegamingsummit.com.

March 8-10: Casino Marketing Boot Camp, Hotel Mazarin New Orleans, Louisiana. Produced by Julia Carcamo Associates. For more information, visit CasinoMarketingBootcamp.com.

March 11-12: Ukrainian Gaming Week 2020, International Exhibition Centre, Kyiv, Ukraine. Produced by Smile Expo. For more information, visit UGW.com.ua.

March 23-26: World Game Protection Conference, Tropicana Las Vegas. Produced by World Game Protection Inc. For more information, visit WorldGameProtection.com.

March 24-26: CasinoBeats Malta, Intercontinental Malta, St. George's Bay St. Julian's, Malta. Produced by Sports Betting Community. For more information, visit SBCEvents.com.

March 24-27: Indian Gaming 2020, San Diego Convention Center. Produced by the National Indian Gaming Association. For more information, visit IndianGamingTradeshow.com.

April 2: Gaming & Hospitality Education Series: Lap of Luxury—The Modern Hotel With a Casino, Konami headquarters, Las Vegas, and webcast. Produced by GGB and Clarion Gaming. For more information, visit GGBGHES.com.

April 23: Gaming & Hospitality Education Series: Casino Cash—Keeping a Deathwatch, Konami headquarters, Las Vegas, and webcast. Produced by GGB and Clarion Gaming. For more information, visit GGBGHES.com.

April 27-28: East Coast Gaming Congress, Harrah's Resort, Atlantic City. Produced by Spectrum Gaming, Cooper Levenson, the Friedmutter Group and Sysco. For more information, visit EastCoastGamingCongress.com.

April 28-30: Betting on Sports America, Meadowlands Exposition Center, East Rutherford, New Jersey. Produced by Sports Betting Community. For more information, visit SBCEvents.com.

May 13-14: ICE North America 2020 & Southern Gaming Summit, New Orleans Convention Center, New Orleans, Louisiana. Produced by Clarion Gaming. For more information, visit ICENorthAmerica.com.



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IGT is committed to socially responsible gaming. Our business solutions empower customers to choose parameters and practices that become the foundation of their Responsible Gaming programs.





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Charting a New Course for Responsible Gaming

With expansion of the industry comes an increase in the need for responsible gaming vigilance



By Cait DeBaun

The gaming industry is experiencing a remarkable period of growth, with year-over-year revenue records, the rapid expansion of legal sports betting and the promise of industry modernization.

Core to this success—and its continuation—is the industry's commitment to responsible gaming. Our business depends on it. Our customers count on it. And the American Gaming Association, on behalf of our members, is always looking for ways to improve it.

The Responsible Gambling Collaborative (RG Collaborative), of which the AGA is a proud member, is taking meaningful steps to chart a new course for responsible gaming. In a first-of-its-kind effort, casino gaming industry organizations have joined with academics, researchers and advocacy groups to outline a unified position through the development of the Responsible Gambling Effectiveness Principles:

1. Support funding for research and evaluation
2. Support funding for problem gambling treatment
3. Help patrons make informed choices about their gambling
4. Ensure every company has a responsible gambling plan and industry employees understand their role and responsibility in fostering responsible gambling and preventing problem gambling behavior
5. Confirm gambling-related business practices that encourage responsible gambling
6. Equip consumers with the tools they need to gamble responsibly and prevent problem gambling behavior

Each principle is paired with recommendations as to how regulators, policymakers, experts, advo-

cates, industry and other stakeholders can take steps to implement these ideas. While only a starting point, the effectiveness principles are meant to spark discussion, encourage collaboration, and generate new insights about the most effective ways to foster responsible gaming, as well as prevent and address problem gambling.

Directly supportive of the first and second principles, the RG Collaborative conducted a state-by-state analysis to better understand whether funding from states' gaming tax proceeds are appropriately spent as they are designated. The research found that fewer than half of the 14 states reviewed spent the allocated money on responsible gaming or problem gambling issues, while the other states were either unclear or unlikely to have spent the money for its intended use. It is clear

“Core to this success—and its continuation—is the industry's commitment to responsible gaming. Our business depends on it. Our customers count on it. And the AGA, on behalf of our members, is always looking for ways to improve it.”

that there is still work to be done to ensure allocated tax revenue is being appropriately spent.

The effectiveness principles, along with the RG Collaborative, demonstrate that there is no shortage of interest and desire to encourage and promote responsible gaming. The AGA looks forward to working alongside the RG Collaborative to build upon these findings and chart a unified approach to responsible gaming for the future.

Cait DeBaun is senior director of strategic communications and responsibility for the American Gaming Association.

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Epidemic of Fear

The full story of the coronavirus has yet to be told, but lingering fear may blunt the eventual recovery

By Frank Fantini



The evolution of the coronavirus is happening fast, and what's happening as of this writing will certainly not be what's happening as you read this.

Nonetheless, I'll hazard a few thoughts on the subject.

The first thought is that nobody knows how this will play out.

No disrespect to equity analysts, who are in the difficult position of having to forecast based on what they know at the time, but nobody can make credible projections when the future of the epidemic is unknown.

It might seem reasonable to say that Macau revenues will be down 40 percent or 50 percent in the near term. But any forecast that says revenues will be down, say, 10 percent for the year, and rebounding to 30 percent growth next year, has little validity.

Even those near-term 40 percent and 50 percent decline forecasts became outdated within days and hours of being made, because the Macau government ordered casinos closed for 15 days. And, again, by the time you read this, the closings might have been further extended.

Moreover, pent-up demand sounds credible

on the surface, but investors should be wary of betting the ranch on that prospect.

This is not a hurricane that wipes out a property, but everything else remains about the same. This is the human psyche we're talking about, and, depending on how far and deep and long the epidemic becomes, people's beliefs and morale can be affected for years. Just look at the generation that grew up in the Great Depression. Many from that era remained financially insecure and risk-averse for the remainder of their lives.

Even if business does rebound, the recovery

might be more cautious than one of pent-up demand.

Hopefully, the coronavirus is arrested soon and disappears from consciousness as rapidly as SARS and the various flu scares.

Meanwhile, it might be wise to heed the advice of Robert Strauss, U.S. ambassador to the Soviet Union in 1991, when some investors were excited about the fall of communism and others were afraid: "If I was 40 years old and I had \$100,000 and I wanted to run it into \$10 million," Strauss said, "I'd go to the Soviet Union. If I was worth \$10 million, I would take that \$10 million and I'd invest \$100,000 of it in the Soviet Union..."

MEANWHILE, A DOMESTIC BOOM?

Unless and until the epidemic reaches the United States, the U.S. gaming industry is riding the waves of a strong economy and confident consumers.

The first earnings releases from the December quarter were positive, with Penn National forecasting strong EBITDA growth this year, Mohegan CEO Mario Kontomerkos saying the new year began strongly, and Red Rock Resorts giving off positive vibes after a rough third quarter.

Investors responded in kind. Penn National stock immediately hit a new 52-week high. Boyd, both a Penn regional peer and a

Red Rock Las Vegas locals market peer, also hit a new high.

And what's good for regional gaming and Las Vegas is good for the gaming REITs, a premise held by investors who have repeatedly pushed Gaming & Leisure Properties and VICI Properties to new highs.

Generally, REITs are unexciting companies, as they hold real estate, collect rents, recycle properties and mostly make a life out of simple blocking and tackling.

But gaming REITs clearly have caught in-

vestors' eyes. As analyst Jordan Bender of Macquarie pointed out, the stocks of the three gaming REITs advanced 36 percent last year, beating the S&P 500's banner 31 percent leap, and the All Equity REIT Index's 29 percent rocket ride.

That bullishness has continued into this year. As of this writing, Gaming & Leisure Properties is up 11.6 percent, VICI is up 6.7 percent and MGM Growth Properties has risen 8.2 percent.

The reasons for the gains have been discussed in this space before:

- The REITs' ability to create deal and rent structures that give higher valuations to properties in mergers and acquisitions has helped accelerate the number of acquisitions. By definition, that means their property portfolios, and by extension their rental revenues, grow. In a sense, gaming REITs are in a growth phase.

- The recent sale and leaseback deals that MGM Resorts signed with Blackstone and its own REIT spin-off, MGM Growth Properties, have excited investors over Las Vegas Strip real estate values.

- In a low-interest rate environment, their dividends give income-oriented investors high returns, both in relative and absolute bases, even as their stock prices rise. The dividends from Gaming & Leisure and MGM Growth Properties yield 5.9 percent, and VICI's 4.4 percent.

- The combination of secure rents and high dividends makes gaming REITs a safe haven, important always, but especially today, as many investors fear a recession may be looming. And there's also that growth kicker, though by now, most of the big deals are in the past.

So, can the stocks continue their advance?

Bender thinks so, noting, among other things, that gaming REITs are still valued 30 percent below non-gaming peers.

Bender raised his target on Gaming & Leisure Properties to \$50.

Frank Fantini is the editor and publisher of Fantini's Gaming Report. For a free 30-day trial subscription email subscriptions@fantiniresearch.com.

"Unless and until the epidemic reaches the United States, the U.S. gaming industry is riding the waves of a strong economy and confident consumers."

AGEM MEMBER PROFILE



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AGEM is an international trade association representing manufacturers of electronic gaming devices, systems, lotteries and components

for the gaming industry. The association works to further the interests of gaming equipment manufacturers throughout the world. Through political action, trade show partnerships, information dissemination and good corporate citizenship, the members of AGEM work together to create benefits for every company within the organization. Together, AGEM and its member organizations have assisted regulatory commissions and participated in the legislative process to solve problems and create a positive business environment.

AGEM Board of Directors Actions – February 2020

- Following a series of press reports in the U.S. at the end of 2019 focused on the spread of unregulated gaming machines in multiple states, AGEM has initiated a fact sheet in conjunction with the American Gaming Association to distinguish regulated gaming from unregulated. This document will serve as a tool to address the spread of unregulated machines and their negative consequences. The initiative kicked off on February 18 with a press release titled “AGEM and AGA Announce Campaign to Combat Unregulated Machines in the U.S.” The message has the support of more than 20 of the industry’s most highly respected associations that will be working together to ultimately educate and inform legislators, law enforcement and policymakers in multiple states.
- Marcus Prater, AGEM executive director, recently met with the International Center for Gaming Regulation’s new executive director, Joe Bertolone, at the University of Nevada, Las Vegas to discuss how to build on the positive relationship between the two organizations. The ICGR, which launched in 2016 as the world’s first academic center dedicated to research and education in gaming, guides the world’s gaming policymakers and regulators as they make decisions that govern the industry. Following the meeting, AGEM officers and member companies are preparing a wish list of key objectives that will focus on domestic regulatory reform.
- AGEM members approved once again to support the Nevada State College AGEM Scholarship Program Renewal with a contribution of \$10,000. This funding will go toward supporting a visual media program that will connect the curriculum to gaming. Part of the sponsorship will be applied to the Truckee Meadows Community College in Reno, where there is good potential for employment to both students and graduates as there are numerous gaming suppliers based there. This complements the AGEM-initiated Assembly Bill 221 that lowered the employment age of gaming supplier employees from 21 to 18 in Nevada.
- Connie Jones, AGEM director of responsible gaming, and Tracy Cohen, AGEM director of Europe, attended the first Ampersand Associations Assembly & Lunch held February 5 at ICE London. Clarion Events hosted this event in response to feedback from various stakeholders and to take advantage of the leadership of many industry associations from around the world, all visiting ICE. The event served as an opportunity to introduce more than 30 associations from around the world to one another and provided a good start to continue conversations. It was clear that many of the challenges are similar and a lot of best practice and advice can be shared.
- AGEM welcomed a new Bronze member in February, taking the membership to an all-time high of 178. Empire Technological Group based in Las Vegas and founded in 2012 is known for its engineering capacity to innovate table game technology directly on the casino floor. ETG has expanded its marketable products with a portfolio of relevant and compelling live table games and slots that can refresh the casino floor.

FORTHCOMING EVENTS

- The 22nd Annual AGEM-AGA Golf Classic presented by JCM Global will take place May 5 at Cascata golf course outside of Las Vegas. Benefiting the International Center for Responsible Gaming’s research, this elite industry event has raised more than \$2.2 million since it started. There are still golf entries open and more information is available at golf.jcmglobal.com.

AGEMindex

AGEM Index Companies	Stock Price			Percent Change		Index Contribution
	Jan '20	Dec '19	Jan '19	vs. Prior Month	vs. Prior Year	
Agilisys Nasdaq: AGYS (US\$)	32.50	25.41	17.70	27.9 ▲	83.6 ▲	3.49
Ainsworth Game Technology ASX: AGI (AU\$)	0.74	0.79	0.78	-6.4 ▼	-5.8 ▼	-0.29
Aristocrat Leisure Limited ASX: ALL (AU\$)	36.20	33.67	24.63	7.5 ▲	47.0 ▲	6.22
Astro Corp. Taiwan: 3054 (NT\$)	12.60	13.40	34.50	-6.0 ▼	-63.5 ▼	-0.04
Crane Co. NYSE: CR (US\$)	85.46	86.38	82.76	-1.1 ▼	3.3 ▲	0.89
Everi Holdings Inc. NYSE: EVRI (US\$)	12.50	13.43	6.65	-6.9 ▼	88.0 ▲	-1.19
Galaxy Gaming Inc. OTCMKTS: GLXZ (US\$)	1.89	1.77	1.89	7.1 ▲	0.0 ●	0.04
Inspired Entertainment, Inc. Nasdaq: INSE (US\$)	5.86	6.75	6.78	-13.2 ▼	-13.6 ▼	-0.29
International Game Technology PLC NYSE: IGT (US\$)	13.49	14.97	16.36	-9.9 ▼	-17.5 ▼	-4.43
Konami Corp. TYO: 9766 (¥)	4,240	4,485	5,010	-5.5 ▼	-15.4 ▼	-4.50
PlayAGS Inc. NYSE: AGS (US\$)	10.28	12.13	25.06	-15.3 ▼	-59.0 ▼	-0.90
Scientific Games Corporation Nasdaq: SGMS (US\$)	24.84	26.78	25.06	-7.2 ▼	-0.9 ▼	-2.73
Transact Technologies Nasdaq: TACT (US\$)	10.65	10.97	10.38	-2.9 ▼	2.6 ▲	-0.04

The AGEM Index decreased by 5.54 points in January 2020 to 540.5 points, a 1 percent decline from December 2019. The drop was driven by stock price declines for 10 of the 13 AGEM Index companies. The overall decline in the monthly index was offset by strong gains for two companies. The stock price for Aristocrat Leisure Limited (ASX: ALL) climbed 7.5 percent, accounting for a 6.22-point contribution to the AGEM Index, while Agilisys (AGYS) experienced a 27.9 percent stock price gain that led to an index contribution of 3.49 points. The major stock indices decreased as the Dow Jones Industrial Average and the S&P 500 experienced monthly declines of 1 percent and 0.2 percent, respectively. The NASDAQ also experienced a gain of 2 percent.

Leaping Ahead

A new decade brings a new era for responsible gaming and problem gambling treatment

By David D. Waddell



As a new decade begins, and online gaming and sports wagering continue to expand throughout the United States, the gaming industry and responsible gaming advocates are making new strides in addressing problem gambling issues.

New Collaborative Efforts

A Responsible Gaming (RG) Collaborative group has been formed, made up of the American Gaming Association, the Association of Gaming Equipment Manufacturers, the Association of Problem Gambling Service Administrators, Harvard Medical School, the National Center for Responsible Gaming, the National Council on Problem Gambling, the National Indian Gaming Association, the National Thoroughbred Racing Association, the Nevada Council on Problem Gambling, the North American Association of State and Provincial Lotteries, the Responsible Gambling Council, the University of Nevada, Las Vegas International Gaming Institute, the University of Memphis, Washington State University and the Yale School of Medicine.

It has taken proactive steps to try to assure a unified approach and effort toward addressing the issue of problem gambling.

When the RG Collaborative was announced, the AGA said its “goal is to work with regulators, policymakers, experts, advocates and other stakeholders to find the best solutions and direct resources to them.”

First established in 2018, the RG Collaborative has outlined goals “to chart a new course on the complex issue of responsible gambling and identify the programs and policies that best address responsible gambling”

as well as prevention of problem gambling and to “hold government accountable for supporting proven, effective solutions.”

As a result of these collaborative efforts, in January, the RG Collaborative announced the following Responsible Gambling Effectiveness Principles to spark discussion, encourage collaboration, and generate new insights into the central question: What are the most effective ways to foster responsible gambling, as well as prevent and address problem gambling?

The six principles announced are:

1. Support funding for research and evaluation
2. Support funding for problem gambling treatment
3. Help patrons make informed choices about their gambling
4. Ensure every company has a responsible gambling plan, and industry employees understand their role and responsibility in fostering responsible gambling and preventing problem gambling behavior
5. Confirm gambling-related business practices that encourage responsible gambling
6. Equip consumers with the tools they need to gamble responsibly and prevent problem gambling behavior

Keith Whyte, executive director of the National Council on Problem Gambling, noted: “The Responsible Gambling Effectiveness Principles are meant to spark discussion, encourage collaboration, and generate new insights into this critical area. We encourage all stakeholders—policymakers, regulators, advocates, researchers, and industry—to build upon these fundamental principles, inserting evidence-based activities and regulations that support safe, responsible gambling.”



“We encourage all stakeholders—policymakers, regulators, advocates, researchers, and industry—to build upon these fundamental principles, inserting evidence-based activities and regulations that support safe, responsible gambling.”

—Keith Whyte, Executive Director, National Council on Problem Gambling

Studying Effectiveness and Accountability

The RG Collaborative also announced in January that it has conducted a study to better understand whether funding allocated for responsible gaming and problem gambling (PG) from states' gaming tax proceeds are appropriately spent as they are designated.

The analysis showed states' handling of RG/PG tax funding fell broadly into three categories in the most recently examined fiscal year(s):

- Six states (Indiana, Maryland, New Jersey, Nevada, New York and Pennsylvania) likely spent the allocated tax money on RG/PG issues.
- Four states (Kansas, Louisiana, Missouri and Oklahoma) likely did not spend the allocated tax money on RG/PG issues.
- Four states (California, Iowa, Mississippi and Ohio) are unclear.
- In these cases, funds may be partially diverted to other issues, the state has recently rolled back the dedicated funding streams for RG/PG altogether, or never had a dedicated funding stream.

In connection with the release of this study, Alan Feldman, distinguished fellow, responsible gaming, at the University of Nevada, Las Vegas International Gaming Institute, noted, “As states are one of the main beneficiaries of gaming revenue, it is essential that designated funding for responsible gambling is used for its intended purpose.”

Bill Miller, president and CEO of the AGA, stated, “I can think of no better way to lead our industry into a new decade than renewing our commitment to effectively promote responsible gaming and tackle problem gambling head on. The Responsible Gambling Collaborative has an important role to play as we chart a new course for responsible gaming, and the AGA is proud to be a part of it. The research released provides important insight into the allocation of funding for essential programs. As the top benefactor of gaming taxes, it's troubling to see that state responsible gaming funds are not always used for their intended purpose.”

The RG Collaborative's focus on assuring “accountability” for the use of responsible gaming funding is having an impact in getting other stakeholders including operators and regulators involved and focused on this topic.

For example, at the January meeting of the Michigan Gaming Control Board, Board Chairman Robert Anthony noted that the new online gaming and sports wagering legislation enacted there calls for \$2 million of additional problem-gambling funding. He observed that there is already money being spent, indirectly, by the state, but noted, “It isn't clear, exactly what the board's responsibility is with respect to making sure that that money is being spent effectively in programs that are really going to focus on problem gambling.”

The chairman then indicated to Executive Director Rick Kalm that he would like a report over the next two or three meetings, explaining how the money is currently being used, how they intend to use the additional dollars and how the board can measure the effectiveness of the money being spent.

Kalm said he will try to capture all the various sources of funds for problem gambling (lottery, sports wagering bill, horse racing) and will ask the Michigan Department of Health and Human Services to report on how this money has been spent in the past, and what the plans are for the future.

New Preventative Technologies

The evolution of the effort to address problem gambling has seen a host of new technologies introduced in the last few years. One such concept includes Responsible Gaming-Oriented Game Features being included with gaming machines.

Modifications to the gaming equipment include features that slow down the rate of play and post warning messages. They include clocks to show the length of playing time, and the offering of play-money modes on machines. With this form of harm-minimization approach, the gaming equipment itself plays a role, assisting people in making informed choices and encouraging responsible gaming behavior. It will be important for this area to be studied going forward to measure the effectiveness of the approach.

The commonwealth of Massachusetts has utilized somewhat similar types of technology as part of the GameSense programs offered at casinos in the state.

In 2015, the Massachusetts Gaming Commission launched GameSense, a player-focused responsible gaming program that encourages players to adopt behaviors and attitudes that reduce the risk of gambling-related harm. Operated by the Massachusetts Council on Compulsive Gambling, GameSense Info Centers are located at each casino property and staffed by trained advisers.

GameSense advisers equip players and employees with information, tips and tools to keep gambling a safe and enjoyable experience. The on-site advisers have played a key role in encouraging patrons to monitor their time spent, and to set budgets for their gambling activities.

Growing Trend for Treatment Shows Success

A very effective means of treating gambling compulsions has been the use of residential treatment centers. In December, the Veterans Administration announced the opening the Las Vegas VA Residential Recovery and Renewal Center, or LVR3, which hosts 30- and 45-day programs for gambling and substance abuse treatment.

The facility is the second of its kind offered by the VA. Its first gambling addiction center is the Brecksville, Ohio, VA Medical Center near Cleveland. These facilities are offered to veterans with compulsive disorders.

Another true leader in offering this form of treatment for problem gambling is the Louisiana Association on Problem Gambling. In 1999, it opened its Center of Recovery, or “CORE” facility, offering residential treatment for compulsive gamblers. The facility offers its service not only to residents of Louisiana, but compulsive gamblers from all over the world.

The facility offers a home-like setting and has 21 beds for adults suffering from a compulsive gambling disorder. CORE indicates that it has had a success rate upwards of 78 percent. Currently, Louisiana residents are able to obtain treatment at CORE at no charge. For out-of-state residents, a flat rate of \$5,000 for the 28 days of treatment is charged, making it an incredibly cost-efficient way of addressing such a compulsion.

The CORE facility's success and its open-door policy have resulted in compulsive gamblers from throughout the country getting treatment, and is inspiring other jurisdictions to explore this treatment option.

One such example comes from the state of Michigan. The Michigan As-

FOCUS ON: Responsible Gaming

“As states are one of the main beneficiaries of gaming revenue, it is essential that designated funding for responsible gambling is used for its intended purpose.”

—Alan Feldman, Distinguished Fellow, Responsible Gaming, University of Nevada, Las Vegas, International Gaming Institute



sociation on Problem Gambling (MAPG), the Michigan affiliate of the NCPG, has referred people afflicted with the disorder there, and recently established a grant program to cover the cost of the 30-day program for individuals who have not had success with the services currently offered in Michigan.

MAPG Executive Director and NCPG board member Michael Burke made the following observations on this program: “I have witnessed firsthand the success that CORE and other in-patient residential gambling disorder treatment facilities can provide to people suffering from gambling disorder. For the first time this January, MAPG contracted with the Louisiana Association on Compulsive Gambling and was able to provide funding for a Michigan resident to attend CORE through our newly established Disordered Gambling Treatment Grant Program.

“The goal of the grant program is to help fill a gap within the state of Michigan, as this type of service is not currently offered. It is my understanding that the Michigan Department of Health and Human Services (MDHHS) is currently exploring residential in-patient treatment for gambling disorder and has allocated funding for two pilot projects in the Detroit area. We are hopeful the MDHHS takes note of the various existing programs already established throughout the country and collaborates with MAPG to ensure the long-term success of the program.”

Established Practices, Existing Protocols

As the gaming industry matures, best practices with regard to responsible gaming have developed, and jurisdictions have learned from each other to continually improve the practices and systems to assure that problem gambling is effectively addressed. This has provided the opportunity for new jurisdictions that add gambling options to learn from others as well.

One of the few remaining states without casino gambling—but where casino gaming is being studied—is the commonwealth of Virginia. Wisely, the Virginia legislature empowered the state’s Joint Legislative and Audit Review Commission (JLARC) to do a comprehensive study related to a review of casino gaming laws in other states, evaluate the commonwealth’s current and potential gaming governance structures, project potential revenues from expanding legal forms of gaming, and evaluate the impact of expanding gaming on the Virginia Lottery, historical and live horse racing revenue, and charitable gaming revenue.

As part of its examination of the impact of expanded gaming, JLARC included a review of problem gambling issues, and delivered its report in late November of last year.

JLARC’s report to the legislature included a call for funding for problem gambling prevention and treatment programs, even if the state does not authorize expanded forms of gambling. The report overview on this topic noted, in relevant part:

Virginia’s existing problem gambling prevention and treatment efforts are minimal despite the public’s access to gambling through the lottery, historical horse race wagering, charitable gaming, and other avenues. States typically fund problem gambling prevention and treatment programs with gaming tax revenue, which should be considered even if the General Assembly does not authorize additional forms of gaming.

Part of JLARC’s review of the topic included a review of best practices in other states. Its report to the legislature provided the following overview of how states go about addressing problem gambling. Chapter 5 of the JLARC report noted, in key part:

States have specific “responsible gaming” requirements to reduce the negative effects of gambling, and casino operators typically have their own responsible gaming initiatives. The most common responsible gaming strategies are self-exclusion lists, prohibiting credit advances and restricting the use of credit cards on the gaming floor, and providing disclosures, such as a problem gambling helpline number. Some states also impose restrictions on operators, such as limiting the availability of check cashing and ATMs for patrons; limiting advertising; restricting alcohol consumption and smoking in gaming venues; limiting hours of operation; and setting limits on wagering or allowing gamblers to set self-imposed limits on losses... Experts recommend self-exclusion lists as an essential strategy. More generally, experts recommend that responsible gaming initiatives be clear about objectives; focus on vulnerable populations; teach people about the risks of gambling and how to gamble safely; give operators some flexibility in implementing responsible gaming; monitor effectiveness; and change as the industry and technology evolves. About half of the states with casinos require operators to submit a responsible gaming plan as part of their application for a gaming license. Such a plan can serve as a framework for all responsible gaming strategies.

Greater Accountability

New forms of legalized gambling are being authorized throughout the states, such as online gaming and sports wagering. They will bring new funding and new challenges to stakeholders involved in trying to combat compulsive gambling. It’s very encouraging that key stakeholders are working collaboratively to provide a unified message on the most effective way to achieve success.

A key part of that success will be an ever-increasing focus on accountability in the use of problem gambling funds. Casino operators and regulators play an important role in making sure that the money provided truly goes to prevention and treatment.

More research will be needed on emerging technologies aimed at prevention of problem gambling. The success that residential treatment facilities appear to be having is definitely something to be emulated throughout the world. Both through the collaboration, and through the efforts of the various stakeholders in the gaming industry, there are now clear best practices that all states (not just potential new states like Virginia) would be wise to consult, to assess whether their states can make improvement in this area.

The RG Collaborative, each of its members, and their ongoing proactive approach to this topic have created a substantial wealth of information and knowledge resources that policymakers, regulators, operators and manufacturers can tap into to help assure ongoing success in this effort.

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Small Changes Can Make A Big Difference

How to use behavioral science principles to reduce gambling harms

By Sally M. Gainsbury, Robert Slonim, and Juliette Tobias-Webb, University of Sydney



Subtle changes to gambling products and venues which enhance people's likelihood of acting in their own self-interest can have a significant positive impact on gambling problems while preserving individual autonomy. Cooperation between stakeholders is needed to conduct real-world trials which can identify the most effective changes to drive positive behavioral change. Development of an independent and transparent evaluation framework will enable policymakers and operators to demonstrate their sustainable business practices to customers.

Many current practices that aim to minimize gambling-related harms are extrapolated from measures used in public health or substance use. There is little evidence to support the effectiveness of many gambling consumer protection policies and strategies, including many required by legislation across jurisdictions.

Some policies consider cognitive errors and the tendency of people to misunderstand gambling products. However, they largely fail to account for heuristics and resulting biases that drive ongoing gambling, even when people are provided with information to educate, encourage or scare them away from excessive gambling.

Behavioral science tools, stemming from a blend of psychology and economics, account for these human factors. These tools are typically low-cost, subtle tweaks to the decision-making environment that promote agency, encourage positive behavioral change, and result in significant measurable reductions in harms.

Despite decades of increasingly restrictive policies and measures to prevent gambling problems, the prevalence of problem gambling has barely shifted globally. Within the U.S., states with longer exposure to and greater availability of legal gambling tend to have higher rates of problem gambling. Some estimates put the social costs of gambling at approximately \$20 billion annually, which does not capture all forms of impacts on indi-

viduals, families and communities.

It is time to consider a new approach to reframe our thinking and look more broadly across academic disciplines to address gambling harms in a way that would be beneficial for policymakers, industry operators and the community.

Neoclassical economics assumes that people have rational preferences among outcomes, strive to maximize utility, and act independently based on full and relevant information. In contrast, a behavioral economics approach to gambling policies and interventions acknowledges people do not always act in their long-term best interest, and introduces a range of relatively simple policy tools that better motivate behavior change.

Behavioral science tools such as commitment devices, personalized messaging, and more generalized “nudges” can be effective across the entire spectrum of gambling-related harms. These tools aim to overcome predictable heuristics in decision-making such as “loss-chasing,” “illusions of control,” “bracketing” of gambling funds (treating money won from gambling or in the form of chips/gambling account as only for gambling), and the “gambler’s fallacy” or “hot hand,” which mistakenly assume gambling outcomes are linked.

Changes to gambling venues and products may reduce the occurrence and strength of some of these biases. For example, stopper buttons on slot

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Customers can be automatically provided with regular activity statements including a clear summary of their net monthly gambling outcome that includes a statement and graphic comparing their outcomes with their own gambling from a previous time period, or to the average gambling customer. This is similar to techniques used to reduce electricity and water consumption.

machines encourage illusory control beliefs. Roulette games display a history of red/black outcomes, which fosters the gambler's fallacy, and slot machines provide losses disguised as wins whereby the player is congratulated for a win, with the value being less than that of the bet.

Gambling-related cognitions are not static; people may intend to gamble a set amount but switch to a more emotionally driven state when they gamble, making more impulsive decisions and spending more than intended. An obstacle for problem gambling prevention programs, such as education on the statistics of gambling, is that training the reflective system may fail to stop gamblers switching into the more emotional mode. As such, strategies that rely on providing people with education and information have a limited impact within a session, and may be more useful to discourage gambling at a population level.

Behavioral science does not intend to restrict behavior or reduce autonomy. However, it does recognize an "intention-action gap," whereby people frequently fail to act on their intentions. Interventions are designed to bring large benefits to those exhibiting poor behaviors, while imposing little or no cost to those acting responsibly. Policies preserve the ability to choose what behavior to engage in, but make a positive behavior easier, simpler, and more attractive.

For example, customers can be automatically provided with regular activity statements including a clear summary of their net monthly gambling outcome that includes a statement and graphic comparing their outcomes with their own gambling from a previous time period, or to the average gambling customer. An accompanying behavioral suggestion would be based on their gambling patterns and risk indicators, and may suggest that they keep at this optimal level or recommend that they set a deposit limit with a direct link to do so. This is similar to techniques used to reduce electricity and water consumption.

Another cost-effective behavioral economics approach is personalization, which is highly relevant for gambling interventions. An increasing proportion of all gambling is now based on individual player accounts, which allow players to accrue loyalty points, keep track of their gambling expenditure, wins and losses, and receive communications from operators. Player accounts enable sophisticated harm-minimization strategies, including personalized messages that target players based on individual characteristics and patterns of play.

Such tailored feedback outperforms traditional warning or informative messages, as it is more likely to be read, remembered, and viewed as personally relevant. Tailored feedback is common practice in marketing and health communication due to its apparent effectiveness in changing behavior long-term.

Strategies that break a repeated and default pattern of responding can reduce mindless and unintended continued gambling, and potentially excessive expenditure. Increasing friction and decision points within betting may prompt gamblers to

switch from an impulsive to a reflective state, and consider whether they want to continue gambling, take breaks, or stop altogether.

This may be achieved through dynamic messages that create a pause in play or appear in a natural break and ask customers to reflect on whether they need a break. Design changes to games may enhance active decision-making, such as prohibiting devices that automatically bet again and requiring customers to specifically place bets for each gamble and requiring a confirmation of bets and/or pause between bets being placed and accepted.

Pre-set courses of actions termed "defaults" are another powerful determinant of behavior, and are recognized in initiatives ranging from enhancing savings for retirement to increasing rates of organ donation. Default settings require people to make an active choice to opt out of, as opposed to opt into, a desired behavior. Relevant examples may include



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default cash-out of large wins and requirement to opt-in to receive regular marketing communications.

A key element in any behavioral science policy or program is measurement and evaluation. The best method to evaluate an intervention is through a randomized controlled trial (RCT), which is an experimental design that randomly assigns participants to a control (no intervention) or intervention group. This method allows the impact of the intervention to be determined by comparing behavioral differences between the two groups. To ensure evaluations are valid, it is important that stakeholders cooperate to enable independent researchers to access real customers and data and ensure results are made publicly available, including unexpected, null and negative outcomes.

Benefits for Stakeholders

There are many benefits of a behavioral science approach for policy-makers, industry operators and gambling customers. These tools are a core component of a sustainable business model; evidence suggests that many gamblers are supportive of efforts to address gambling harms, and are willing to accept mild disruptions to their own gambling if the strategy is perceived to benefit others.

Research shows that gambling customers who engage with consumer protection tools have greater loyalty to operators. Evaluation is an important component of this approach, enabling any unintended consequences to be identified and any unsuccessful approach to be withdrawn.

Interventions are targeted to those who are most likely to benefit, and aim to make subtle changes that have incremental but significant effects across the customer base. The appeal of nudging is self-evident: it proposes a set of seemingly subtle, low-cost environmental and policy changes that can be applied to a wide range of individuals, or targeted groups. Consequentially, a behavioral science approach is being adopted by governments and industry leaders globally, and would have significant benefits for the gambling field.

There is increasing recognition of the responsibility and requirement for industry organizations (within and beyond gambling) to provide products and services that are in the customer's best interest. Open gambling markets with competition between operators provide customers with a greater ability to seek points of differentiation. Simultaneously, policymakers must justify the increased availability of gam-



Design changes to games may enhance active decision-making, such as prohibiting devices that automatically bet again and requiring customers to specifically place bets for each gamble and requiring a confirmation of bets and/or pause between bets being placed and accepted.

bling with requirements for effective consumer protection measures.

We recommend that an evaluative framework be developed to guide an independent assessment and scoring of the extent to which an operator provides products in accordance with behavioral science principles. Accordingly, we propose the Behavioral Science Environmentally Friendly Scale (BEFS, Gainsbury, Tobias-Webb, & Slonim, 2020), which will be developed for this purpose.

Operators, venues or products would receive a score based on the extent to which they incorporate BEFS principles into their product design and services, and this score would be publicly displayed or even part of licensing conditions. This has significant benefits by providing a simple and transparent evaluative approach which would build trust in the industry and regulators, enable comparisons between gambling activities and jurisdictions, and offer a way for operators to signal their good intentions and sound practices towards offering a sustainable business.

This article is based on a paper published in Gaming Law Review by Dr. Sally Gainsbury, Dr. Juliette Tobias-Webb and Professor Robert Slonim from the University of Sydney. The full paper can be accessed here: Gainsbury, S. M., Tobias-Webb, J., & Slonim, R. (2018). Behavioral economics and gambling: A new paradigm for approaching harm-minimization. Gaming Law Review, 22(10), 608-617. <https://doi.org/10.1089/glr.2.2018.22106>

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RG Gets An Assist From Technology

Slot players can expect help from slot makers to avoid problem gambling

By Dave Bontempo

Here's to a new focus.

There's been a seismic industry shift regarding people who gamble too much.

Organizations once geared prevention efforts to a perceived problem base of 1 percent to 2 percent of patrons. These involved extreme, heart-wrenching examples: pastors gambling away parishioners' assets, college students getting hooked on campus, and families torn apart by reckless social behavior. Treatment was the tool of engagement.

An expanded, more pragmatic view has emerged.

The National Council on Problem Gambling (NCPG) is eyeing a second target, perhaps 25 percent of the gaming population that's deemed to be flirting with danger, yet is more likely to be helped. Its players are probably a step away from being under control, rather than a step from falling over the edge.

The 25 percent group can be reached because the preachers have props. Technology is the tool of engagement, embedded within gaming products. The gaming industry offers technological advancements like time limit-setting, spend limits, take-a-break functionality, facial-recognition technology and algorithms. Its product line continually evolves.

In March, the NCPG kicks into high gear for Problem Gambling Awareness Month. Groups across America hold conferences, air public service announcements, provide counselor training, host screening days, run social media campaigns and engage in other activities to increase public awareness of problem gambling, as well as the availability of prevention, treatment and recovery services.

It is perfectly timed to coincide with NCAA March Madness, a time when young gamblers can become addicted to the action.

Double-Edged Sword

Operators walk a fine line with this issue.

They can neither condone financially irresponsible players nor discourage business in a cutthroat

Operators walk a fine line with this issue.

They can neither condone financially irresponsible players nor discourage business in a cutthroat world. What's the balance?

Responsible gambling has no immediate ROI. Its reward is doing the right thing.

world. What's the balance? Responsible gambling has no immediate ROI. Its reward is doing the right thing.

Gaming commissions can provide operators political cover with shareholders by mandating certain products statewide, thus leveling the playing field. Some jurisdictions, like Massachusetts, require responsible-gaming mechanisms on machines.

Two parallel warning shots from the U.K. further amplify the issue. The country recently cracked down on fixed-odds betting terminals (FOBTs), slashing the stake limit from £100 to £2, viewing the terminals as a major temptation to vulnerable people. A gambler lost nearly £14,000 at an FOBT in an hour, and nearly a quarter of a million players lost £1,000 each over a one-year period.

The U.K. also will forbid credit-card funding of online gambling by mid-April. These measures could cost operators billions in the name of saving people from themselves.

That type of move is unlikely in the United States, but the message is an urgent one for casino operators: get out in front of this. It begins by taking to new levels the philosophy of betting with your head, not over it.

Responsible gaming measures are like speed bumps or flashing messages indicating traveling speed. They make a person think. They enable gamblers to step back and assess, rather than quickly regress. Credit some of this perspective to the online gaming boom, which dramatically enhanced the number of people playing, and thus brings more attention to vulnerable gamblers.

Some estimates put the number of gamblers in excess of 1.5 billion regularly, and more than 4 billion making wagers at least once a year.

The gambling world has become far too large to police, but the individual player can self-monitor with the aid of technology.

NCPG: Expanding Its Audience

The National Council on Problem Gambling and similar organizations both laud and cajole the gaming

industry regarding deterrence of disordered gambling.

"You can never eliminate something like alcoholism," says Keith Whyte, executive director of NCPG. "You can help people not be stigmatized and help them not be shamed. By the same measure, you cannot succeed at elimination of the gambling problem. It trivializes the gambling addiction, and is insulting to people with real problems.

"I would love to see the industry resume its mantle of leadership in this area," he adds, noting industry successes while seeking more participation. "It benefits them as well. Gaming expansion brings even more concerns about addiction.

"We all want long-term, stable customer relationships. Being out in front of the issue and using technology for responsible gaming is one awesome way to do that."

Whyte sees three fertile areas where the gaming industry can interact with the problem.

In the data science realm, he advocates the use of advanced analytics, using player-tracking technology to aid responsible gaming. That can be manifested in data analyzing the frequency of one's play, the size of a loss, how often customers deposit funds, what amounts are registered and whether they change.

"It would be nice to see customers receive motivational messages helping them moderate their harm," Whyte says. "What if every fifth message said, 'You've done great, you've stayed within your deposit limits for the last three years. Here's a drink on us?'"

Whyte seeks more real-time cooperation among casinos to spot self-excluded patrons who are gambling, particularly by operators who have several properties.

Ultimately, he believes self-set limits help gamblers, as do reminders when they exceed their deposit limits. This establishes a natural cooling-off period, which is vital.

A good number of players will lose the majority of their bankroll in the final 25 percent of the time they're on a device, because they become frustrated and double their bets, trying to get even. Simply slowing the pace of a game can help a customer avoid catastrophe.

How involved are vendors in this?

More than one might think.

Cutting-Edge RG Tools

Scientific Games introduced the first responsible gaming technology in the United States, according to company officials.

The company also worked closely with the state of Massachusetts to develop and implement "PlayMyWay," an innovative budgeting tool for players. The custom-designed application helps patrons monitor and understand their playing behavior in real time.

The integrated play management software utilizes a simple, easy-to-understand interface that includes graphics. Once enrolled, customers get automatic notifications after approaching 50 percent, 75 percent, and 100 percent of the budget they have set for daily, weekly or monthly spending.

Customers can choose to stop at any point or keep playing. They can also enroll, adjust their budget or un-enroll in "PlayMyWay" from any game at the GameSense info center or at a GameSense kiosk under Massachusetts regulation. First-time enrollees also receive a one-time \$5 food credit that can be used



at select food vendors at Plainridge Park Casino.

Scientific Games champions another aspect of responsible gaming via SG Vision, a forthcoming computer vision and biometrics technology that enhances everything from player identification to bonusing. As it pertains to responsible gaming, SG Vision will verify player age and recognize other behaviors.

SG Vision tracks both anonymous and carded player tracking. This supports both responsible gaming efforts for anonymous players and adds a level of player safety. The company is demonstrating a collaborative project via SG Vision with the UK Gambling Commission and Ladbrokes Coral GVC group.

Scientific Games has also addressed the fixed-odds betting terminal market in the U.K. and developed player-protection tools for games.

The FOBT system packs an array of features. They include automatic reminders shown on-screen, customized player limits, algorithmic reminders that can highlight problematic play behavior (in trials), bespoke algorithms that run a player's history for retailers/operators and send alerts to players via email, and machine log-in and limits for high-stakes players monitored by staff.

Innovations like this will be at the forefront of future attempts to amend the FOBT bet stakes.

Scientific Games also worked with U.K. bookmakers and other manufacturers to create the Anonymous Player Awareness Systems (APAS). APAS uses real-time algorithms, programmed to detect risky gambling play in all FOBT terminals in U.K. betting shops, and reacts with enforced cooling-off periods. The algorithms are confined to anonymous player sessions and monitor patterns of play behavior.

Multi-Level Responsibility

"Aristocrat sees promoting responsible game play as a core obligation of our business," says Harry Ashton, group general manager, responsible game play, for Aristocrat Technologies. "Our philosophy is to act in three ways, by complying with the rules, empowering players and improving over time."

The compliance realm pertains to regulation and litigation, ranging from data protection, privacy and platform rules in the digital sphere, to licensing and game regulations in its land-based business. Player empowerment entails delivering more internal staff training, providing players with clear information on the way games work, developing responsible game-play features, and providing more choice and information to digital game players.

Improvement means investment in responsible game-play product innovation. The company contributes financially to research done by the



likes of the University of Sydney Gambling Research and Treatment Clinic and the U.S. National Council on Responsible Gambling, according to Ashton.

"Our responsible game play policy and commitments apply equally to the digital social (B2C) part of our business," he adds. "What we do is not confined to the land-based world and will possibly become more relevant again as convergence trends continue. Aristocrat is also working hard to develop and promote best practice in the digital space."

Ashton says Aristocrat has several technologies to help players make informed choices.

"Some examples include pre-commitment through our System 7000 product in Australian markets, self-exclusion functionality through our Oasis 360 casino management system in U.S. markets, and time limit-setting functionality through our Canadian VLT products," he indicates. "In terms of new and emerging technologies, we're constantly looking at embedding a consumer-focused approach into the product design process. In order to do this, we've implemented a product development charter across our game design teams to ensure that games are developed in line with our responsible game-play commitments and company values."

Ashton said the company also promotes awareness about how its products work.

"We're developing a suite of player information videos which explain in simple terms how gaming machines work and help to bust myths," he says. "We're also rolling out training for all staff that will help our people to support this effort and advocate responsible game play in their own communities and networks."

"There's plenty more to do, of course, but these are some of the practical ways we're acting."

Synchronized Help

Konami Gaming has blended a technological and community-minded approach to responsible gaming. The strategy involves both its signature product, Synkros, and an activist role in fundraising.

The company has teed off on the concept, figuratively and literally. For more than a dozen years, it has served as an organizer for the AGEM/AGA Classic, which has contributed more than \$2 million to the International Center for Responsible Gaming (previously the National Center for Responsible Gaming, now ICRG). Tom Jingoli, Konami's executive vice president and chief commercial officer, serves on the ICRG board of directors.

"Our commitment to responsible gaming is longstanding and far-reach-



"Synkros' responsible gaming features can allow people to voluntarily specify the amount of funds they want to spend in a day, and the system will begin to warn them as they approach that limit."

—Tom Soukup, Senior Vice President and Chief Systems Product Officer, Konami Gaming



Konami has built safeguards for responsible play into its Synkros gaming system, installing protections at virtually every player touchpoint

ing," Jingoli asserts. "Responsible gaming is a guiding principle for how we develop games and technology at Konami."

"To ensure the future of our industry, gaming suppliers must be dedicated to high standards of player entertainment as well as player protection. Konami sponsors countless conferences and

events connected to responsible gaming."

Not surprisingly, Konami's popular gaming system, Synkros, has responsible gaming placed into its foundation.

"Konami has built safeguards for responsible play into the very DNA of Synkros, making protections available at virtually every player touchpoint," says Tom Soukup, Konami's senior vice president and chief systems product officer.

"Synkros' responsible gaming features can allow people to voluntarily specify the amount of funds they want to spend in a day, and the system will begin to warn them as they approach that limit," he says. "Or if players prefer to set a time limit for how long they want to spend on gaming entertainment, they can automatically receive warnings or even set a cool-down period as they approach their voluntary time limit. Players can set, change or view these limits directly through the player-tracking interface at the slot machine."

The industry grasps the importance of responsible gaming and the significance of compliance, security currency and other prevention measures.

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The China SYNDROME

Why the PRC's impact on gaming throughout Asia is dependent upon many issues

By Steve Gallaway and Brendan Bussmann

The People's Republic of China (PRC) continues to emerge as an economic and political superpower in the world, and its actions have a direct influence on the gaming market in Asia. This goes well beyond the borders of Macau, SAR (Special Administrative Region) that nearly 20 years ago opened up for the first time to foreign casino operators beyond Stanley Ho's monopoly.

The reach of the PRC permeates both economically and politically into key emerging markets such as the Philippines, Cambodia, Vietnam, South Korea, and other markets throughout the Far East (including Northeast and Southeast Asia).

This reach continues to expand and impose a significant influence on a growing gaming industry throughout the region. To follow the spending habits of PRC gamblers, one must consider several factors. This includes the ability of Chinese players to travel far and wide, as well as the ability of these citizens to move money out of the country. However, it also includes the political reach that the PRC has in exerting its influence in other countries. Gaming dollars can also flow from the state through its "Belt and Road" initiative that provides a hook into the infrastructure of each of these countries, both to expand the industrial complex of China and to further influence their political landscape.

Understanding the Geopolitical Dynamics

In order to examine the reach of the PRC on a country-by-country basis, it is important to first understand the geopolitical dynamics that are in play both inward and outward from the PRC. Most recently, this can be seen by the outbreak of the coronavirus from the Wuhan Province. The disease, which was first identified in December (if not before), started a massive spread right at the start of the Lunar New Year.

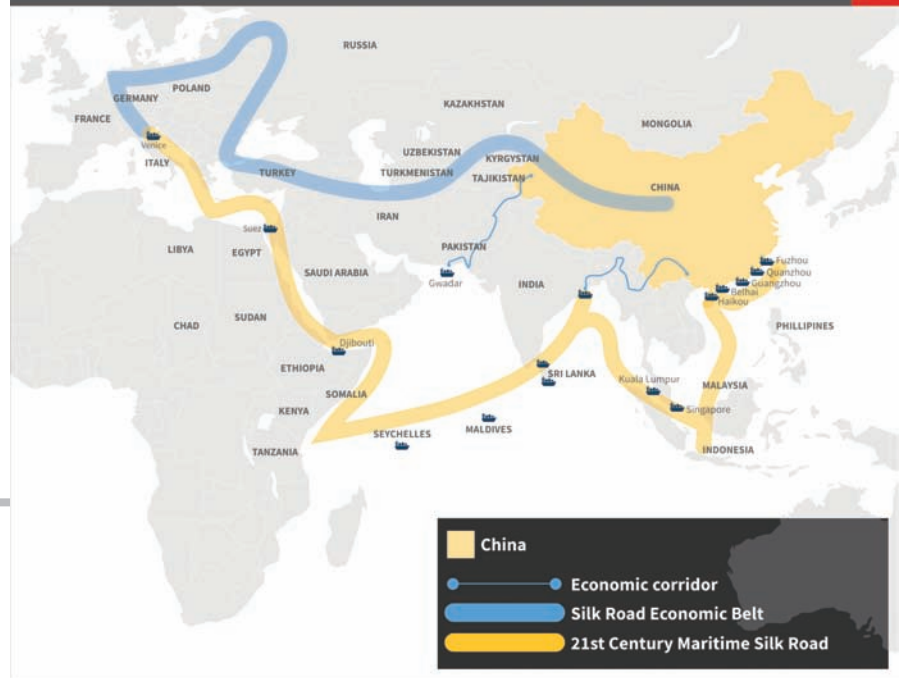
As of the writing of this article, the casinos in Macau have been shuttered for at least two weeks, and this could be extended as no one knows how long the quarantine will be in place. Flights in and out of China to all other parts of the world have been canceled, and travel in and out of the country has become extremely limited. Additionally, the shuttering of casinos proved to be only the beginning, with hotels and other non-gaming facilities now following suit. Despite these facilities being shut down, their operators are continuing to support their workers through the crisis.

China also has its own form of "responsible gaming" initiatives, where





Introduced by President Xi Jinping in 2013, BRI was viewed as the New Silk Road to launch a series of infrastructure investments from East Asia to Europe in an effort to expand China's economic and political influence.



the government will limit visas to a certain area and/or region of the world. This has been one of the many problems that the Macau casinos have faced over the years, with limits being put on the PRC gamers that reside on the mainland preventing them from making frequent visits to Macau.

This also transfers into other regions of Asia and allows the mainland to control the ebb and flow of its citizens. While this could result from the current political situation of either the PRC itself or its neighbors, it could also stem from its concern over the effects that gaming may have on the social harmony within the Chinese culture.

One of the other forms that dictates the flow of gaming dollars is the PRC's Belt and Road Initiative (BRI). Introduced by President Xi Jinping in 2013, BRI was viewed as the New Silk Road to launch a series of infrastructure investments from East Asia to Europe in an effort to expand China's economic and political influence. It has now even reached into Africa as the reach of BRI continues to expand. Some believe that this is a way for China to exert its influence into other parts of the world through military and regional influence.

This also includes state-sponsored companies allowing further development for industrial production. In its support of a vast network of railways, bridges, energy pipelines, ports and telecommunications efforts, BRI has already resulted in hundreds of billions of investment dollars into over 60 countries around the world that account for over two-thirds of the world's population.

This is important because there is usually an outflow of Chinese nationals that oversee these projects while also establishing industrial complexes in these countries. The result is a direct lead-in to the desire for individuals from the PRC to partake in gaming activities in these countries.

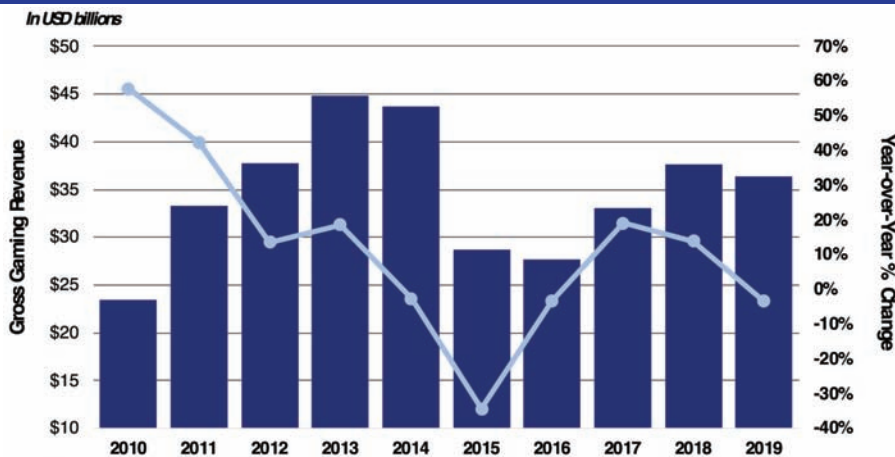
Macau as the Gateway

In a country that continues to promote "One Country, Two Systems," Macau serves as the initial gateway for gambling-related dollars from the PRC, as it is the only area in the country where casinos are allowed. As an SAR of China, Macau has been open outside of the original SJM monopoly for over 15 years, initially led by the opening of Sands Macau in 2004. While there has been a continued up-and-down revenue cycle over the last 10 years, Macau continues to be the



The opening of Sands Macau in 2004, the first casino not owned by Stanley Ho, began the massive visitation of Chinese citizens to the SAR

Macau Gross Revenue from Games of Fortune 10-Year Summary



Source: Macau Gaming Inspection and Coordination Bureau (DICJ)

China also has its own form of “responsible gaming” initiatives, where the government will limit visas to a certain area and/or region of the world. This has been one of the many problems that the Macau casinos have faced over the years, with limits being put on the PRC gamers that reside on the mainland preventing them from making frequent visits to Macau.

largest gaming market in the world.

Macau’s revenue has been largely dominated by VIP play but is transitioning further to cater to more mass and premium mass play. The continued increase in visitation over the years has also been supported by continued infrastructure investments and connectivity within China through road and rail. Macau has continued to see its ups and downs over the course of the last 10 years, during which the gaming market has matured significantly. Many of the downturns have resulted from policy decisions from Beijing that threw the harmony of the Chinese culture out of balance, and they tried to correct it with the limitation on access to the SAR.

While events related to the coronavirus do not bode well for the short-term outlook of the market, it will likely rebound after the travel restrictions have been lifted. However, when adding on the impact of the slowing Chinese economy, along with the Hong Kong protests that have had a profound impact on the Hong Kong economy which serves as one of the gateways to Macau as the other SAR in the Pearl River Delta region, this combination has put one of the largest strains that the Macau market has seen in some time.

Manila’s Continued Growth

The Philippines has the benefit of having two tranches of revenue streams from the gamers of the PRC. The first comes through the traditional brick-and-mortar casinos, including the casinos owned by PAGCOR (Philippine Amusement and Gaming Corporation) and, more significantly, the larger integrated resorts as a part of Entertainment City.

This also is served by a large junket model that features many of the same dominant players in Macau, including Sun City. Gaming revenue from 2018 to 2019 increased by 11.6 percent year-over-year, reaching P75.8 billion (US\$1.5 billion), which was up from P67.85 billion (US\$1.35 billion). However, the revenue growth was largely led by a second tranche, online gaming and the continued growth of Philippine Offshore Gaming Operators (POGOs).



POGOs have been the largest source of growth for the Philippines both in terms of infrastructure and political dynamics. POGOs offer online gaming focused on three main areas: online games led by live dealers online (LDO), sports betting, and horse/animal racing. The growth has been led largely by the play of Chinese gamblers, as well as some players from elsewhere in Asia.

However, these POGOs have resulted in a large influx of Chinese nationals relocating to various parts of the Philippines, mostly in the Makati City area of Manila where most of these operators and their accredited service providers are located. PAGCOR acknowledges that over 130,000 foreign workers are employed by the industry, and it is understood that a majority of these individuals are Chinese nationals.

POGOs were one of the targets in the late summer of 2019 by President Xi. After discussion with Philippine President Rodrigo Duterte, the POGO expansion was halted but remained operational. The online operators con-

POGOs have been the largest source of growth for the Philippines both in terms of infrastructure and political dynamics. POGOs offer online gaming focused on three main areas: online games led by live dealers online (LDO), sports betting, and horse/animal racing. The growth has been led largely by the play of Chinese gamblers, as well as some players from elsewhere in Asia.

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NAGA's founder, Tan Sri Dr. Chen Lip Keong, has fostered a good relationship with Chinese officials guaranteeing steady visitation to his Cambodian casinos

tinue to face scrutiny from internal forces as well because of the influx of Chinese workers that have put influence on other sectors including the housing market, the commercial real estate market, immigration, and law enforcement issues ranging from human trafficking and prostitution to money laundering and other unscrupulous behavior.

With the current issues surrounding coronavirus, the Philippines has placed limits on entry from Chinese nationals into the country because of the potential spread of the virus in an unchecked environment. Some of the traffic has slowed anyway because of the other issues with immigration, which the government itself had already addressed to curb the influx.

One of the more interesting results of the quarantine may be the potential for growth in the online gaming market. While it is noted that POGOs have had little crossover in players from casino gaming and other segments, those gamers that cannot currently leave China even to go to Macau may look for other options to still game, with POGOs as a natural alternative.

The future of the Cambodia market will partially be determined by the fallout from the departure of online gaming from the market, which reportedly saw over 120,000 Chinese nationals depart the country, as well as the pending draft of the Gaming Law.

Cambodia's Crossroads

Cambodia is another market that has faced its challenges over the last year to its brick-and-mortar industry as well as its now-shuttered online gaming market. Cambodia was also the target of investment coming from BRI. In mid-2019, there was controversy surrounding a large port, with many arguing that it was going to be used by the Chinese military.

Furthermore, the Chinese invest in manufacturing, special economic zones, and the highway connecting Sihanoukville and Phnom Penh. Some believe that the Cambodian government blinked to Chinese pressure as it related to online gaming to keep the flow of investment in infrastructure and manufacturing into the country. Several casino projects have slowed or been brought completely to a halt following the announcement of the online gaming ban that came into effect at the end of 2019.

The Cambodia market has largely been dominated by NAGA Corp., which continues to see exponential growth in the market. NAGA has never been involved in the online gaming market and has focused heavily on the land-based business. The Chinese junkets continue to be a solid source of rev-

enue and continued growth. Tan Sri Dr. Chen Lip Keong, the founder and controlling shareholder of NAGA, has served as an astute leader who appreciates his relationship with the Chinese customer and does not want to throw off the balance that currently exists.

The future of the Cambodia market will partially be determined by the fallout from the departure of online gaming from the market, which reportedly saw over 120,000 Chinese nationals depart the country, as well as the pending draft of the Gaming Law. The new law is supposed to expand the oversight of the government over the gaming industry as well as raise taxes. NAGA Corp. will continue to be the dominant player in the market, but growth will likely return as other operators and junkets adjust to the new operating environment.



Revenues at the foreigners-only casinos in South Korea (Jeju Sun Casino on Jeju Island) fluctuate wildly because the PRC tightens and loosens travel to Korea

The Extending Reach of the PRC

Other markets in Asia have had significant influence from the PRC gamer, including Vietnam. Largely led by Chinese tourism, the market will continue to expand as long as the relationship with the mainland continues not to be disruptive. Laos, for example, will likely see some additional growth as investment continues to ramp up in manufacturing and infrastructure, which may lead to a flow of PRC gaming dollars to destinations within the country. South Korea is another great example of the ebb and flow of the political relationship with the Chinese, as the market has continued its ups and downs based off of its relationship with its neighbor.

The reach of the PRC goes well beyond its borders. The geopolitical forces play an interesting role in how gaming revenues and tourism are affected in this region. The views of Beijing have a reach that includes investment within the region that in turn brings gaming dollars and leads to future gaming growth.

It can be relatively easy to follow the investment patterns of BRI into the region to see where the gaming dollar leads outside of the PRC. However, one must also understand the geopolitical influence that may be tied to that investment, as it can make or break a region if it falls out of harmony with the Chinese. As can be seen from the quarantine to prevent coronavirus outbreak, the sheer size of the population is a major factor, and turning off the spigot of travel can have a profound impact on gaming throughout Asia.

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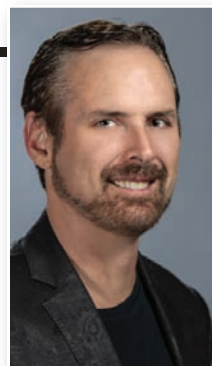
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Not-So-Trivial Pursuit

If you want to play the game, you've gotta talk the talk.
Take this quiz to see if you're an ace or an impostor.

By Roger Snow



Whereas the old Soviet Union was—as famously and quotably described by Winston Churchill—a “riddle wrapped in a mystery inside an enigma,” what we have for you today is something different.

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Can you run the table in our table-games gauntlet? Do you know the history, lingo and lore that surrounds the green felt jungle? Then it's time to put up or—well, actually, it's just time to put up. Take out that sharp mind and that Sharpie, and see how you fare.

Unless, of course, you reading this on your phone or laptop. Then, like Terrell Owens after he scored that touchdown back in the day, you're better off keeping that Sharpie sheathed.

Here we go:

1. Nickname for a turtle or a blackjack natural (seven letters, starts with “s”)
2. Constipated, or type of dice game where two, three, 11 and 12 are points (eight letters, starts with “c”)
3. What is win divided by drop?
4. “_____ odds,” the math behind a call in poker (three letters)
5. 12, 13, 14, 15 and 16 in blackjack (six letters)
6. Etiquette says you never shoot from here
7. Who held the “Dead Man's Hand?”
8. Chinese game played with buttons
9. Pai Gow “recipe” (two words, eight letters total)
10. The one watching us all, according to Robert De Niro in the movie *Casino*
11. Chuck-a-Luck's other name (two words)



12. Bet after the outcome; crossroad tactic (two words, both start with “p”)
13. Playing card insect
14. James Bond's original casino game of choice (three words)
15. Name for a generous player or a curious primate
16. Roulette purgatory (two words, French)
17. In baccarat, a two-card eight or nine
18. What a salesman gets, or the 5 percent in pai gow or baccarat
19. Also known as “tie” or “standoff”
20. What hand did the dead man in Question 7 hold?



How do you measure up?

- 0-10 correct: Uh, don't leave your day job.
11-13: Floor supervisor
14-15: Pit Boss
16-17: Shift Boss
18-19: Casino Manager
20: Look out, Ace Rothstein, you're coming for his job!

Roger Snow is a senior vice president with Scientific Games. The views and opinions expressed in this article are those of the author and do not necessarily reflect the views and opinions of Scientific Games Corporation or its affiliates.

- ANSWERS**
1. Snapper
 2. Crapless
 3. Hold
 4. Pot
 5. Stiffs
 6. The “Don't” in craps
 7. Wild Bill Hickok
 8. Fan Tan
 9. House way
 10. The eye in the sky
 11. Sic bo
 12. Past post
 13. Bee
 14. Chemin de fer
 15. George
 16. En prison
 17. Natural
 18. Commission
 19. Push
 20. Two pair: Aces and eights

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Alcohol and Casinos

Is your property doing what is reasonable and responsible?

By Alan W. Zajic

Alcohol has been an important component of gaming across the U.S. and around the world. As gaming evolved in the U.S., so did the individual jurisdictions that control the sale of alcohol and in some tribal casino locations, clashed with a tribe's culture and sovereignty.

The service of alcohol in conjunction with gambling is synonymous throughout history, and is displayed in commercial television and movies as part of the social experience of gambling in casinos.

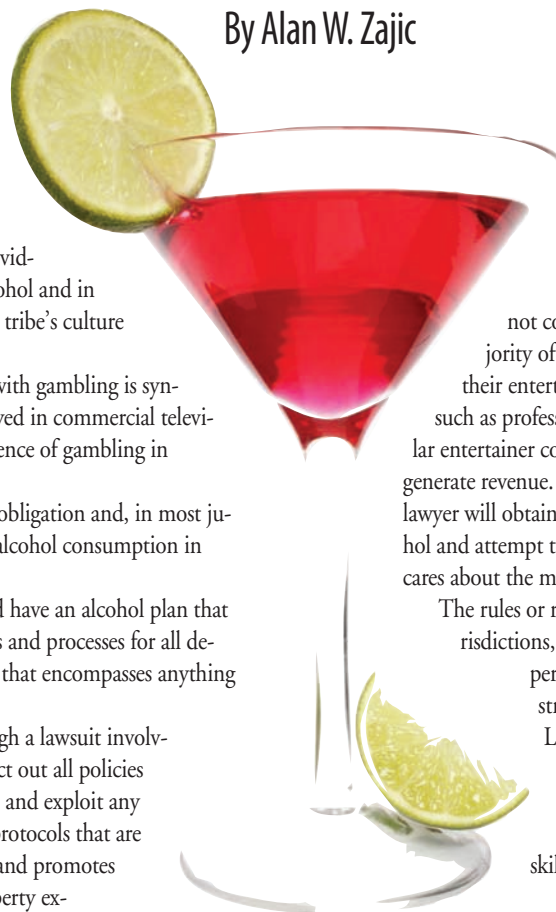
Most people agree there exists a moral obligation and, in most jurisdictions, a legal requirement to manage alcohol consumption in gaming establishments.

As a result, each casino property should have an alcohol plan that formalizes the property policies, procedures and processes for all departments in a single document or manual that encompasses anything related to alcohol service.

Any executive that has had to go through a lawsuit involving alcohol knows that a plaintiff will dissect out all policies and procedures from multiple departments and exploit any inconsistencies between departments and protocols that are contrary to established regulations or laws and promotes confusion and lack of consistency. If a property exceeds the common practices of competitor properties, the chances of prevailing in a legal action increase dramatically.

Although I have never come across a casino where alcohol is served that did not have some form of protocols for alcohol management, I have seen properties that do not have clear and obvious ones that mandate a reasonable effort to prevent at least excess intoxication. I have also seen instances where a plaintiff attorney will state during opening arguments that the defendant casino did not even have a basic "alcohol plan."

What better evidence to have at trial or during an inspection by the Alcohol Board than a booklet with bold letters displayed on the cover "Casino Alcohol Plan" that includes beverage service standards,



security and surveillance standards, and a documented plan to take reasonable steps to prevent intoxication and deal with intoxicated patrons?

Although there are many people who do not consume alcohol while gambling, the vast majority of adults do indulge as an important part of their entertainment and social experience. Special events such as professional boxing or exhibition matches or popular entertainer concerts drive significant alcohol service and generate revenue. You can be assured that a good plaintiff lawyer will obtain the revenue numbers from the sale of alcohol and attempt to convince a judge or jury that a casino only cares about the money and not intoxication.

The rules or regulations regarding alcohol vary between jurisdictions, from some that prohibit—some that will not permit any alcohol on the casino floor—to unrestricted environments found in markets such as Las Vegas. The customers that travel to or from other jurisdictions become confused due to the changing regulations depending on where they are, and positive customer service skills are required to explain the local laws.

The state laws regarding alcohol service in a casino also vary wildly across the U.S. Those liquor liability laws are commonly referred to as "dram shop laws," which comes from old English law in that a dram was a measure of ale in past centuries.

The concept was if you were the proprietor or tavern owner, there was a responsibility to make sure your patrons got home safely if you got them intoxicated. Essentially, a tavern owner would have a responsibility to put the drunk patron on their horse and deliver them to his/her spouse if they were responsible for getting them intoxicated.

Currently, 43 states and the District of

Each casino property should have an alcohol plan that formalizes the property policies, procedures and processes for all departments in a single document or manual that encompasses anything related to alcohol service.

Columbia have some form of dram shop laws. Those states without any dram shop liability laws are Nevada, Maryland, Delaware, Virginia, Kansas, Louisiana, Nebraska and South Dakota. In these states without dram shop laws, it becomes difficult to sue a bar or casino should a patron leave the establishment intoxicated and cause serious injury or death—although not impossible. If other factors of negligence are proven, a property in a non-dram shop state could be exposed to negligence liability based on other legal theories.

In today's legal climate, individual states have the power to develop, promulgate and implement laws pertaining to alcohol including on sovereign land if a tribe wants to sell alcohol as part of the entertainment experience. The key is that in order to sell alcohol within the borders of any state or territory under U.S. jurisdiction, a liquor license is required.

Although some tribes have developed their own liquor laws, the state liquor license still becomes an important factor in compliance if the desire is to sell alcohol within the four walls of a casino.

Each state has different legal standards which include hours that alcohol may be sold in a casino. The majority of jurisdictions have a period of time

that alcohol may not be sold, starting somewhere between 1 a.m. and 2 a.m. This becomes a challenge when a casino is open to the public 24/7.

The solution that evolved was what is called the "alcohol sweep," when designated employees patrol through the casino taking any alcohol away from customers at the magic hour when it is no longer legal to sell alcohol and collect all bottles and glasses and remove them from the casino floor.

In Nevada, there is no time limit, nor is there a prohibition for leaving with alcohol along the Strip or in the Downtown concentration of casino properties. Clark County, Nevada, where Las Vegas casinos are located, actually has a county ordinance that prohibits serving alcohol to an intoxicated person even though Nevada is a state that enjoys a lack of liquor liability or dram shop laws.

I would suggest that each top property executive ask departments that serve alcohol or manage alcohol service if there is a cohesive, reasonable and obvious documented plan to manage the service of alcohol and deal with persons who do become intoxicated. A legal review would also be prudent.

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Beverage Department:

In almost all environments, there is a requirement that any employee who serves alcohol must attend and successfully pass a test on the responsible management and service of alcohol. As a consultant who performs alcohol service audits, I have never found a casino property that when audited, all servers had the training or were actually in possession of their card evidencing the training. This becomes very problematic during a claim or lawsuit when the server involved was not legally trained.

Most properties have service standards that include the amount of alcohol per mixed drink, and some properties have specific restriction on serving multiple drinks to a single customer. Then in nightclub environments where bottle service is promoted, there is typically a lack of documentation on what safeguards are in place to manage alcohol consumption when patrons can pour their own drinks.

The laws do not give any exceptions for bottle service, and whoever serves the bottle is ultimately the person required to manage alcohol consumption and help prevent over-intoxication.

Regardless, a clear and reasonable alcohol service plan should be documented to include what disciplinary actions are expected if a server violates the self-imposed standards. If the top executive of a casino merely asks for a copy of the beverage department policies and procedures and checks to see if there is a well-documented plan to address the moral and legal expectations for responsible alcohol management, they will see for themselves of the need to formalize and tighten up the protocols.

Having a formal process to slow down or cut off a customer:

A common mistake in all alcohol service environments is not having a specific process to stop service of alcohol after an appropriate evaluation of a customer that exhibits symptoms of intoxication based on their training. In some states, this is actually mandated in statutory laws or regulations. A property should have a written plan on what the process is to stop service with some form of supervisory oversight.

Plaintiffs will routinely make the accusation that the bartender or server will violate the rules if you tip them in excess. I favor the process in many casinos of the beverage service shift supervisor being the person charged with officially telling a customer they cannot have any additional alcohol.

This process works well in that the beverage supervisor is responsible to complete a written statement to be included in the security report required for any cutoff, is required to communicate to all servers of the ac-

Most properties have service standards that include the amount of alcohol per mixed drink, and some properties have specific restriction on serving multiple drinks to a single customer.



tion, is required to notify security and surveillance prior to approaching the customer with a security officer, and admonish servers who may have overserved the customer.

The largest benefit to this process is the obvious documentation of your property actually cutting off persons and taking action as proof in a state alcohol audit or lawsuit. Although some properties will complain that this is too burdensome on a beverage supervisor and other departments, that may demonstrate the need for more oversight.

Ideally, a person being cut off from alcohol should be dealt with in a positive customer relations manner, not be embarrassed by the action, have good documentation including surveillance video, and document how the customer was assisted in their intoxicated state. A beverage supervisor can accomplish this important function.

Dealing with the intoxicated customer:

In many instances of alcohol-related customer contact, the customer arrived intoxicated and sometimes was served. Ideally, if a property can prohibit already-intoxicated customers from going into the casino, that will go a long way in managing alcohol incidents and consumption. The laws in most states do not support the theory that a customer arrived in an intoxicated state and therefore the casino is not responsible. Already-intoxicated customers typically are not the demographic casinos attempt to attract.

Properties outside of Nevada that place security personnel at every public entrance have the immediate ability to stop intoxicated people from entering and creating incidents or a higher risk of an alcohol-related incident. Properties without ingress/egress posted security have a more difficult task in watching for and dealing with an intoxicated customer while on routine patrol.

Regardless, there is also a responsibility that once you have contact with an intoxicated individual, you should assure they have a safe way



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home or to their hotel room. Having a taxi voucher system or use of a shuttle bus can help in that regard. In these environments where transportation is not possible, more creative methods of preventing an intoxicated customer from wandering into traffic or getting injured is needed. Obviously, the preferred method is to have a plan not to allow customers to become over-intoxicated in the first place.

Care should be given if they are a hotel guest, are inebriated, and are taken to their hotel room. There are instances where a customer has died from alcohol poisoning or aspirated on their own vomit and died. Security and/or EMT protocols to assess the customer should be considered.

Training

As previously stated, most states (including Nevada) require that all servers have training at mandated intervals in responsible alcohol management. Many also require managers and security personnel to have the same training. I am an advocate of security personnel and any supervisor or manager that may have to deal with an intoxicated customer be trained in responsible alcohol management.

If HR is the department responsible to make sure all employees required to be trained are actually trained, a process to check or audit that training should also be considered. Responsible alcohol management training is a perishable skill that requires periodic refresher training.

I am also an advocate of employee-signed acknowledgement in writing. The document should be in the form of an agreement that the employee will not serve an intoxicated customer, and other items of importance. This always demonstrates to team members management's emphasis, and will assist in disciplinary infractions related to over-service. It is also a productive document in legal actions.

Formal Reporting of Alcohol Intoxication

Security personnel are the obvious choice for most properties to document alcohol intoxication incidents in a formal report. If security documents incidents, I would suggest that security complete the incident report to include actual voluntary statements for all personnel involved including the server, beverage supervisor, security officers and supervisor involved, and any other appropriate witnesses. In addition, surveillance should also pull and save video of associated activity and prepare a review report for positive documentation.

Inspect What You Expect

Some form of periodic review or audit will help to reinforce the alcohol plan. A security department can be required to submit a summary of alcohol incidents monthly to the general manager, beverage manager or

Key Takeaways For Developing A Reasonable Alcohol Plan:

- Have an overall alcohol plan that includes all departments involved in alcohol in one document.
- Property top executive can ask for all departments to submit any policy, procedure, protocol or practice involving alcohol to a designated executive and the legal department to do a cursory review.
- Determine a method to prepare the all-encompassing plan (involve stakeholders, etc.).
- Prevent already-intoxicated people from entering the casino.
- Determine the specific supervisor (not employee) to be charged with formal cutoffs.
- Mandate a comprehensive written report with all parties submitting written statements.
- Inspect what you expect. Have a process to make sure your desired deliverables are being accomplished. Make appropriate annual revisions.

any other executive which will promote positive alcohol management practices. Surveillance can also complete audits of servers to watch for overpouring or serving to an intoxicated person.

Completing an audit of training and compliance will almost always assist in enforcement and awareness. Mandating a team member cannot work if they do not have a current card evidencing alcohol training will also assist. An HR director can also complete a monthly summary of employee violations related to alcohol service or abuse.

Any time it is known that a property manager is checking on a particular process, it invariably results in positive results.

And finally, the top property executive with oversight of alcohol service or the general manager should imagine they are in a deposition or trial and being asked questions regarding how your property responsibly manages alcohol.

Alan W. Zajic CPP, CSB, ICPS, is a nationally recognized, board-certified expert in security and surveillance, with over 35 years of practical, hands-on experience. Zajic is a court-certified expert in many jurisdictions across the U.S. Contact Zajic at alanwzajic@aol.com.

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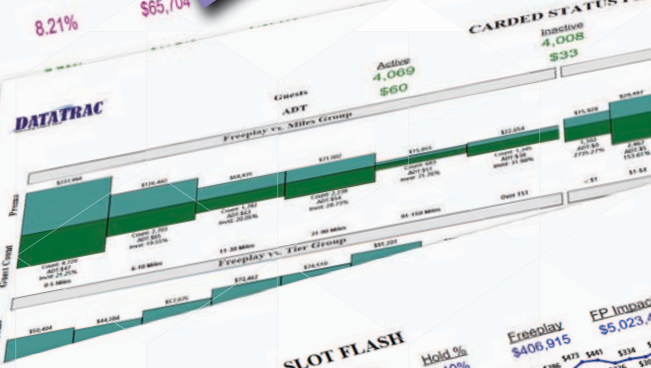
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YTD	\$192,600,405	\$15,321,593	\$102,862,970	\$1.27	7.96%
Current MTD	\$12,090,229	\$940,416	\$6,177,906	\$1.32	7.78%
Previous MTD	\$11,403,728	\$936,299	\$6,163,668	\$1.65	8.21%
Current WEEK	\$1,634,956	\$126,819	\$830,687	\$1.36	
Previous WEEK	\$1,921,350	\$130,983	\$976,170	\$1.32	
DAY	\$727,723	\$68,199	\$356,508	\$1.33	



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\$1.27	7.96%	\$1,034,000	\$326,101
\$1.32	7.78%	\$66,130	\$245,985
\$1.65	8.21%	\$65,704	\$245,985



SLOT FLASH			
AVG Bet	Hold%	Freeplay	Jackpots
\$1.27	7.96%	\$1,034,000	\$326,101
\$1.32	7.78%	\$66,130	\$245,985
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TAKING THE GUESS WORK
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Surveillance Skill Set for the Roaring '20s

As technology advances, the future belongs to those who have more skills and greater flexibility

By Willy Allison

The capabilities of artificial intelligence technology and camera technology are endless, especially in the casino industry. We're only just starting to scratch the ticket and see the prize. If casinos invest and adopt in the technology—and quite frankly, why wouldn't they?—it could change the way we run casinos forever.

All eyes will be on the department formerly known as surveillance, the gatekeepers of the casino camera system. They are in a position to have a huge role in the development of automated computer vision-based systems to provide valuable intel to management across the organization and to help them run their departments more efficiently and profitably.

Or they could be put in a corner. Their role diminished in the organization, as managers are given access to all of the available data, alerts, video analytics and actionable intelligence. Some casino executives might ask the question, why have a surveillance department? If facial recognition technology works, why do we need (you) people to recognize people?

It would be easy for surveillance people to argue that using computer vision for managing casinos in the future will never happen. Over the years casinos haven't exactly shown a lot of enthusiasm for investing in surveillance technology and changing the operational status quo of what our Las Vegas founding fathers intended.



Some casino executives might ask the question, why have a surveillance department? If facial recognition technology works, why do we need (you) people to recognize people?





Fair point. I'm just saying that I believe there will come a day when the cost-to-benefit ratio cannot be ignored by accountants. For those who say the technology is not there yet, I point you to Moore's Law, which states the speed and capability of computers can be expected to double every two years.

I'm not in the "robots-taking-jobs" camp but I think we can all see that automation is having an effect in the job market all over the world. It has been for a long time, in some shape or form. I see automation ramping up over the next decade. In the casino industry we've heard the stories of robot cocktail servers and seen the YouTube videos of robot dealers. Industry old-timers used to say you will never replace dealers and cocktail waitresses—that's why people come here. Yeah... no.

Could surveillance people lose their job to a robot? My answer to that is if you consider it to be just a "job" and all you do is come in every day and watch monitors, then yes. Computer vision software will interface to your cameras (every one of them) and monitor the casino using sophisticated algorithms to detect undesirable activity. No training. No time off. No sleep mode. No pay. No health care.

If you consider yourself to be an employee with a very particular set of skills (think Liam Neeson in the movie *Taken*) that can contribute to achieving

the casino's business goals of profitability, protection and growth, then I say you have a future in the business. A great future.

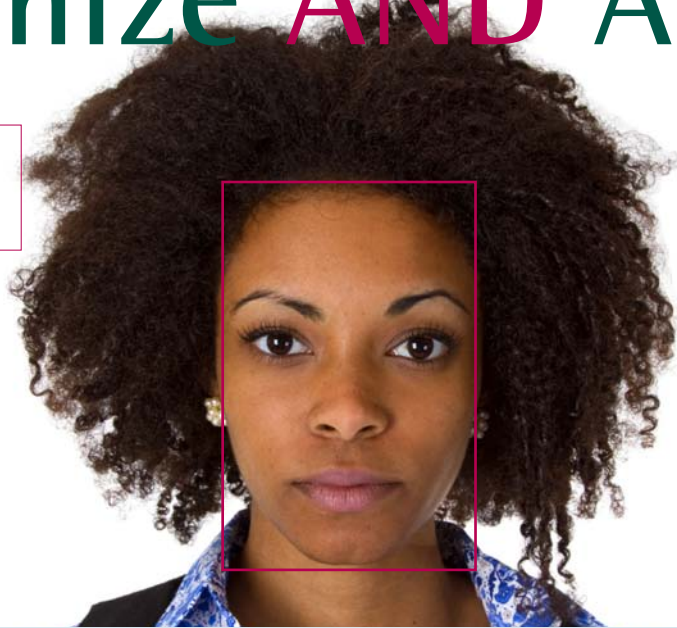
To realize their potential, surveillance employees will need to develop and upgrade their skill set. Obtaining knowledge is important. It's what most surveillance people have been dieting on for years through cramming manuals, reviewing videos and on-the-job experience. But having knowledge tucked up in your head doesn't always equate to getting tangible results, adding value or achieving company objectives. It just means you know stuff.

Hire For Character, Train For Skills

Changing the role and the way surveillance departments traditionally run will require hiring people with different skill sets. Alternatively, existing talent can be developed through creating internal advanced training programs or funding education in local colleges.

I used to hire people with no casino knowledge or experience about 95 percent of the time. Actually, that policy was more of a necessity, because outside of major markets and casino clusters there was a limited pool of expertise to choose from. I took the clean slate/open mind—our training is the best approach.

Recognize AND Analyze



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What I looked for in an applicant was good character and attitude. Resumes meant nothing to me except for reading their work experience. It was on us to train and develop good people and turn them into warriors. To be honest, I wouldn't have it any other way.

Over the years I have learned that nepotism has plagued the casino industry. People in power juicing family and friends into jobs. It's not good, particularly in surveillance. More often than not the juice-ee is a problem child. The thought is that they can be hidden away in surveillance where they don't have to do much.

Wrong! If it's a proactive surveillance operation focused on adding value, there is nowhere to hide. This is another reason it is important to educate other managers in the organization and always promote high standards in people and performance.

Then there are the HR people who conveniently try to move gaming people up into surveillance because of a "situation." I once got a call from HR eight months after we opened a casino that went like this:

"Willy...we have a problem. I was hoping you could help us. It would be really nice. We have just found out that one of our baccarat dealers only has one eye. She didn't mention it (she lied) when we hired her. Anyway, she makes a lot of mistakes on the table (especially on the side she can't see), so the table games director thinks she should be fired. She loves working in the casino and we thought... well... it would be really nice if you could give her a job in surveillance."

Traditional Surveillance Training

Once you have chosen the right person, there are two ways to learn to become a surveillance operator. You can go through a 12-week in-house training program before starting the job, or perform on-the-job training. Which path you will take will depend on the size of the casino.

Large casinos around the world often run schools on a periodic basis that will take on multiple students. Scheduling of the schools is based on turnover rates, and a goal to always keep team numbers at an optimum level. To save money, smaller casinos tend to replace surveillance people reactively after someone leaves. New people are thrust into the job and required to get up to speed as soon as possible.

There are no standards for surveillance training, so often the syllabus and learning objectives vary from property to property. Most training programs are knowledge-based, involving reading a lot of manuals. Archived videos are often used to show common cheating and theft moves.

Often casinos hire game protection consultants to come in and train them on things to look for. Unfortunately, a number of these seminars (although entertaining) resemble a magic show—often filled with sleight-of-hand trickery and cheat moves that haven't been reported in the last decade or two. I like the fact that they raise awareness of the possibilities along with key elements of cheating like deception and distraction, but quite frankly, in my career I've never seen a magician cheat a casino. I do see the value from a motivation perspective, but would prefer to see trainers teach casino people how to fish instead of just throwing them fish.

Most in-house training programs teach basic skills required to do the job like using the equipment in the monitor room, reporting, communication, calculating game payouts, card counting and making coffee. A small number of casinos may offer advanced skills after the initial training like body language, conducting threat assessments and audits.

Upgrading the Skill Set

The introduction of AI computer vision-based systems will change the role of surveillance and the job description of employees. Essentially, the monitoring of games will be automated. Cheating, advantage play, theft, breaches of rules and procedures, efficiency, wager amounts, payouts, player identities and behavior will be monitored by artificial intelligence. To optimize the potential of the new technology, staff can be reassigned to new tasks and responsibilities.

In order to do this, staff training will need to be more competency-based. In other words, learning how to do stuff. Learning knowledge will remain in the core curriculum, but if trainees don't already have them, they will be taught advanced skills that can add value. Of course, it will be desirable to hire people with these special skills from the outset, but if existing people don't have them, they should have the opportunity to learn them.

The skills I think will be important revolve around four areas: investigations, analysis, systems, and communication.

Investigations: Be able to conduct a criminal investigation and interrogation. Be able to gather and analyze open-source intelligence (OSINT).

Analysis: Be able to interpret gaming data and performance. Be able to review large losses and identify reasons. Be able to conduct trend analysis. Be able to solve business problems. Be able to examine processes and make recommendations for improvement. Be able to conduct and write a threat assessment. Be able to conduct and write an audit.

Systems: Be able to write code. Be able to design algorithms to detect fraudulent activity. Be able to work with vendors and suppliers to develop system interfaces. Be able to maintain and secure the department database and information systems. Be able to examine electronic games and design detection mechanisms.

Communication: Be able to confidently present information to senior management either verbally or digitally in a clear and accurate matter. Be able to design infographics, slide shows and videos that can be used internally for training and management presentations. Be able to design effective court presentations for criminal prosecutions. Be able to come up with strategies to maintain positive relationships across the organization. Be able to set up clear channels of communication with other departments in a crisis management situation. Be able to get everyone in the department on the same page.

To be clear, I don't expect anyone to have all the skills listed. The department would designate specific functions and responsibilities for individuals. After the initial induction training course, new people would be thrust into the response team to deal with live situations and AI interface alerts. In time, their special skills would be utilized in specific roles within the team. Essentially, each member of the team would be responsible and held accountable for specific tasks.



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Ideally, over time it would be good for staff to develop all of the skills I have listed. I used to think it was better to specialize in one thing. Find your niche, work on it and do it better than anyone else. Over the years I've changed my thinking slightly. I think if you want to stand out it is good to be excellent at one thing. However, to open yourself up to new opportunities, you should gain knowledge and skills in many things. Become a jack of all trades. Know a little bit about everything and continue to develop new skills and gather knowledge.

Start Thinking About the Future

Casinos will have to pay more for individuals who have special skills and talent. The cost could be offset by halving the size of the team and paying skilled people twice as much. Additionally, the reduction in "watchers" and the return on valuable management information could fuel financial growth for the organization. I believe an environment that requires the skill sets I've mentioned could become an incubator for future games and marketing programs, a catalyst for innovation and the creation of a smart casino.

There are obvious hurdles to get over. The technology is a long way off. Development costs for customizing technology for the specific purposes of

casinos may not be initially seen as lucrative for tech companies. It will take a financially mutual partnership with a visionary technology leader to make it happen. An alternative would be for casinos to invest in the creation of their own AI development teams.

I don't see this happening any time soon. I would probably take the over on 10 years. In saying that, there is no reason why we can't start thinking about the future and what it's going to mean to our jobs. Are any jobs safe from robots? What skills can I learn to make me more valuable to my employer or even lead me in a fantastic new direction I would never have dreamed of?

Personally, continuous learning and developing new skills has worked for me. When I started in the business as a trainee surveillance operator I never thought I could write articles for *GGB* magazine, do podcasts, have my own newsletter, train people around the world, consult for major corporations or create a gaming conference in Las Vegas. Knowing stuff helps, but doing stuff opens up all sorts of new opportunities.

Willy Allison is a veteran surveillance director at several multi-national casino resorts, and the founder of the World Game Protection Conference. For more information on Allison and the conference, visit WorldGameProtection.com.

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The Fusion Esports Arena is now in development in South Philadelphia's Stadium District, a companion to the Cordish Companies' Live! casino

Esports:

Is This the Future of Gaming?

Some operators who want to phase in new generations of players are looking at a growing phenomenon: competitive video games

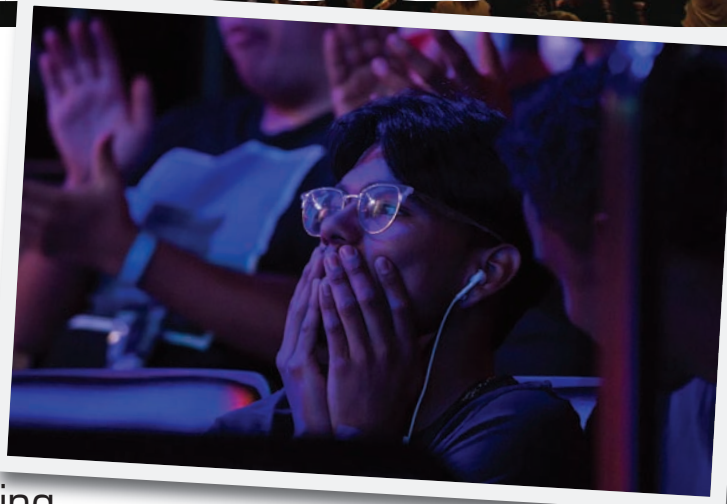
By Marjorie Preston

In 2015, talk show host Jimmy Kimmel famously compared esports to “going to a restaurant and having another person eat your food for you.”

The appeal of esports—basically, competitive video gaming—is usually lost on generations that didn’t grow up with it. But these days, Kimmel and others like him might not be so dismissive.

According to Jack Etienne, owner of esports team Cloud9, in 2018 the once low-profile pastime “really cracked into the mainstream.” Since then, esports has grown into a billion-dollar global industry. Nearly 100 million viewers watched last year’s League of Legends world championship, about the same number who watched Super Bowl LIV.

But do esports—in which banks of gamers hover at consoles, playing Fortnite, League of Legends, Call of Duty and other video games—have a place, niche or otherwise, in the casino environment?



Globally, esports are followed by about 2 billion fans

Jud Hannigan says yes. Hannigan is CEO of Allied Esports, which opened the first esports arena on the Las Vegas Strip in 2018. The HyperX Esports Arena at the Luxor drew some 300,000 patrons last year and hosted 245 events, as well as 45 third-party events, such as new-game launch parties.

“The Fortnite crowd knows to come in every Friday,” says Hannigan. “The fighting-game community comes out every Wednesday. And on Saturday nights, we have our Mario Kart events,” which draw older players, some from as far away as Los Angeles, many dressed as the mustachioed Luigi. “We’re a destination not only for participation, but high-profile events that are broadcast to millions of people around the world.”

Meaningfully, he adds, esports “grab a Gen-Z and millennial demographic that’s hard to reach—people 18-35—like nothing else out there.

This is all the rage in the world of sports entertainment, and this is where significant growth is coming.”

Seth Schorr was ahead of the curve, opening an esports lounge at his Downtown Grand Casino in 2016. At the time, Schorr said, “The landscape of gaming is changing, along with every other industry, because of advanced technology and consumer behavior. It’s my duty to keep Nevada relevant by changing with the times.”

Last June, Reno Mayor Hillary Schieve pushed esports for the Reno-Sparks Convention Center. “It’s one of the things that really needs to be looked at,” she said, “because this is the wave of the future.”

HyperX now has lots of company along the Strip, says Hannigan. “There are weekends when Hard Rock has an event going on, the Rio has an event going on, and we have an event going on. It’s very exciting to see esports take over Las Vegas in this way.”

Future Shock

If you ask Menashe Kestenbaum, esports is not a coming phenomenon, but one that’s clear, present, disruptive and potentially transformational.

“Around the world, there are 2.2 billion gamers,” says Kestenbaum, founder of Enthusiast Gaming, a gaming network spanning North America and the U.K., with 900 YouTube channels that reach 150 million visitors

monthly. “At least a billion are on their phones; the rest are hardcore gamers who have a TV in the living room, hooked up to a console or a PC. It is definitely worldwide at this point.”

Gaming has become “the predominant form of entertainment” for younger generations, he says, “and it will only get bigger. Right now a lot of parents don’t understand why their children get into it, but when you get to the point where the parents grew up with gaming too, imagine how easy it will be to penetrate households.”

These days, esports not only fill stadiums, but stadiums are being built just for esports. For example, Comcast Spectacor and the Cordish Companies are building a dedicated esports center, the \$50 million Fusion Arena, at the South Philly Sports Complex, home of the Wells Fargo Center, Lincoln Financial Field, Citizens Bank Park and Xfinity Live! Melco Resorts & Entertainment opened the first esports venue in Macau in 2018, at Studio City, hoping to attract a younger crowd.

Enthusiast Gaming now partners with Aquilini family, owners of the Vancouver Canucks hockey team, who saw the potential after an esports tourney at the Rogers Arena sold out within four hours, hosted 90,000 fans over four days, and “set new levels of noise in the arena,” says Kestenbaum. “That’s when they acquired an Overwatch team and a Call of Duty team with us.”

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Esports competitors at the HyperX Esports Arena at the Luxor

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If you argue that esports aren't sports at all—it's an easy argument to make, since the "athletes" are mostly inert, fixated on the action on-screen—big-league esports investors such as Shaquille O'Neill, Michael Jordan and Alex Rodriguez might beg to differ.

"It definitely has elements of regular sports," insists Kestenbaum, "and elements of chess—it's an interesting mix of strategy, fast-paced reaction time and psychology. It borrows from entertainment, imagination and sports, and blends it all together. And it's extremely accessible, because all you need is a smartphone, computer or laptop."

But that doesn't mean it's a good fit for casinos. Or does it?

Serge Vardanyan, CEO of esports company WIN, has said casinos are increasingly in search of "alternative channels" as slot customers age out. Esports, he said, "is at the top of that list."

Vardanyan says more casinos should be dipping their toes in the water, staging esports tournaments not as one-offs but as recurring events, like bingo nights, to win loyal younger patrons.

Nir Ben Lavi agrees. The co-founder and CEO of X-Factory Holdings, described as an "innovation thought leader" in sports betting technology, calls esports "a totally new ball game, bringing a revolutionary influence to an industry that's been developing in an evolutionary manner."

But can gamers and gaming fans eventually be monetized—i.e., turned into gamblers?



"Right now, it's an evolving youth phenomenon that shouldn't be confused with what goes on in a casino."

—Gavin Isaacs,
Chairman, SBTech

Not So Fast...

Gavin Isaacs isn't convinced that esports are about to take over the casino, at least not anytime soon.

"If you're a fanatic player, I can understand why you'd get excited by it," says the industry veteran, who is chairman of SBTech and former CEO of Scientific Games. "There are five or six fantastic video games that a lot of people in their early 20s play, and now they're arranging themselves in teams and competing against other teams. But by definition, this is very different from casino gambling—for one thing, a very young clientele, with little disposable income."

"In years to come, as those young people get older, if that's what they like to bet on, maybe," says Isaacs, who pointed out that he speaks for himself, not the companies with which he's affiliated. "But right now, it's an evolving youth phenomenon that shouldn't be confused with what goes on in a casino."

"Betting with esports is not quite there yet," Kestenbaum admits, "but it's on a massive growth trajectory, and could probably go hand in hand with sports betting. I'm just not sure how esports could go in a setting where you have slots, blackjack and whatnot."

In Ben Lavi's view, there's no time like the present to cultivate the next generation of players—and the generations that will follow. As millennials mature, he says, they will "grow to be a 'super-power' segment of consumers" and an important, if not essential part of the casino market.

"Millennials seem to be a totally new breed of consumers, consuming sports, esports and entertainment in a social rather than in an individual way," he says. "They were born in an already digitized world. Screen-swiping is as natural to them as breathing, and they're fluent in digital communica-

It's the "tugboat effect:" a young competitor goes to game night with parents or the whole family, who stick around to watch, then head out to sample other attractions in the resort

tion and consumption—as opposed to Generation X, which learned the digital world as adults.

"One major challenge this generation presents to the traditional casino industry is that millennials' first choice would be to consume whatever they can digitally, rather than leave their room and screen and go to a physical location providing a specific service," Ben Lavi says. "For traditional casinos, which built much of the customer experience on physical presence, such a change in consumption patterns is quite a challenge.

"Another characteristic of millennials is the need for instant gratification, which is more profound with them compared to Generation X, Generation Y or the baby boomers. Once technologies enter the game, we could point at new solutions that best fit real-time, seamless solutions for micro-betting on real-time sports and esports matches, such as the ones offered by Unikrn, BetBull and others."

In other words, he suggests, casinos "that desire to stay alive and kicking will have to go digital or go obsolete."

According to Hannigan, there are a lot of hurdles to clear for operators who want to somehow leverage esports as a gambling form to entice "the



potential customer of the future." "With PASPA coming off and sports betting becoming quite prevalent, regulations are changing. There's a big opportunity out there, but there are some challenges to it, too, like the (esports) game publishers potentially not wanting that activity around their games, and also the regulation side getting comfortable."

In the meantime, says Isaacs, operators lose nothing by considering esports and how they may evolve over time.

"In my view, sports betting is a much better way to attract younger customers, but if I had some free nights and a hall, why not bring in (esports)? It might bear fruit, and be a good investment for the future."

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Shows, Churches and Waze

I decided to take another look at casino entertainment this month, since I get player's club offers all the time including tickets to things like *Legends In Concert*, a sort of dead-superstar revue. Looking around the industry, comedy shows are still great, with Jerry Seinfeld and Jay Leno now trying to squeeze in around Sebastian Maniscalco shows, which now cost, like, \$400.

But music is a mixed bag these days. There are aging mainstays, like The Who's residency at Caesars Palace, titled *Who's Breathing?*—well, that's what I heard, anyway—and Elton John making his latest farewell tour, *Goodbye, Yellow Brick Rest Home*—or is it *Honky Chateau with Walk-In Bathtub*?

There are other struggling oldies—Grand Funk Railroad is all over the casino industry, but it's not really Grand Funk because they canned leader Mark Farner a while back. The Backstreet Boys are still around, although by now they're pretty much the Backstreet Middle-Aged Guys.

Then there are the endless tribute acts. Later this year at Mystic Lake Casino in Minnesota will be the *Australian Pink Floyd Show*. Does that mean there's a *British Bee Gees Show* somewhere?

Well, there's one new tribute act I've got to see. It's at the Riverside in Laughlin, Nevada, the casino founded by the same guy who founded the town, Don Laughlin. Laughlin, 88, still lives part-time at the Riverside, in a penthouse suite. But on Sundays, I'm guessing the lifelong Catholic goes down to Don's Celebrity Theatre, at which the marquee includes space not only for *Australian Thunder from Down Under* and a Karen Carpenter impersonator (oh, boy), but with Saint John the Baptist Catholic Church and its headliner, Rev. Charles Urnick, aka Father Charlie.

"I'm on stage three times a weekend," the 71-year-old Father Charlie once said.

Father Charlie preaches in front of a stage where you can see the drum set in the dark. Don't worry. No one's injecting rim-shots into the Catholic Mass. (Sorry, Sister Aurelia. I couldn't resist.) From what I can see, there isn't even a band. But I'd like to attend, if only to see the bigger picture—Father Charlie leading the procession into the showroom to give Communion in front of a huge "Skyy Vodka" banner and a picture of Elvis, the celebrant jokingly reminding the congregation that they're praying to "God the King," as opposed to Elvis the King.

Father Charlie's operation is similar to one on the Vegas Strip in the old days. Back in the '80s, my wife and I would sometimes attend Mass at the Roman Catholic church that was next to the old Sands, where they would gladly accept casino gaming chips in the collection basket. I'm happy to say the collection basket at Don's Riverside Theatre/church also accepts gaming chips, along with a more modern

twist, slot cash-out tickets.

I'm definitely going to visit Father Charlie's church. I could certainly use a little grace on the casino floor these days. But instead of Father Charlie, I'm going to use his other nickname, which is way cooler: the "Chip Monk."

(By the way, Sister Aurelia was my eighth-grade teacher at Saint Joan of Arc parochial school in suburban Pittsburgh, who would not have liked my rim-shot crack at all. Again, mea culpa.)

Finally, I had to comment on this next news nugget, because it involves my home base of Atlantic City. In January, hundreds of users of the Waze navigation app plugged "Borgata Hotel Casino & Spa in Atlantic City" into their smartphones and, as we all do, slavishly followed the voice of the GPS lady to their destination, which they assumed would be the most popular casino resort in Atlantic City.

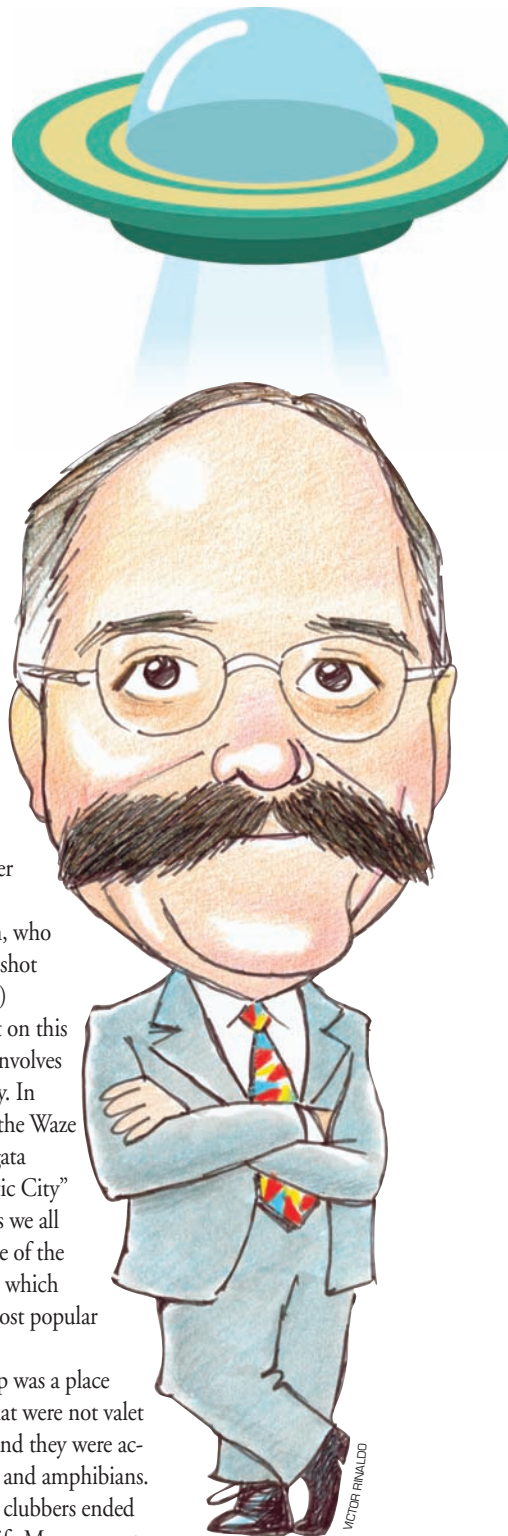
Only where they ended up was a place where there were mammals that were not valet attendants, or even humans, and they were accompanied by various reptiles and amphibians. The Borgata casino-goers and clubbers ended up in the Colliers Mills Wildlife Management Area, near Lake Success in Jackson Township, about 45 miles north of Atlantic City in Middle Of Nowhere, New Jersey.

But believe it or not, that's not even the weird part. Jackson Township Police reported a "tremendous increase" in disabled vehicles in the wildlife area concurrent with this Waze snafu.

That instantly reminded me that all those flying saucers in the 1950s sci-fi movies landed in New Jersey, up in the Pine Barrens.

That's why all the misguided vehicles suddenly broke down. For all we know, their drivers will show up 50 years from now, wandering around the Pine Barrens all confused.

Personally, I'm waiting to see whether confused wildlife researchers suddenly show up at the Borgata.





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Danielle Rankin

Director of Business Development, Konami Gaming, Inc.

Though born in Arizona, Danielle Rankin grew up in Ocean Pines, Maryland, just outside Ocean City. She played soccer for Stephen Decatur High School, where her coach, Amy Fenzel-Mergott, proved to be a pivotal person in Rankin's life, one of the first strong female figures she looked up to.

"She taught me that you only set your own limits and all of them can be broken, and always pushed us to be better and lead by example," Rankin says. "We used to run sprints on the track. The entire group had to finish under the time limit or the team ran again. You were only as good as your weakest link and you needed to work together."

Those lessons followed Rankin to the University of Arizona, where she obtained a B.S. degree in 2006 in retail and consumer sciences. MGM Resorts recruited her for its Management Associate Program, where she assisted with the retail and merchandising division.

Less than two years later, Rankin gained an appreciation for gaming as a career and left a position as merchandise planner with MGM Resorts to become a casino marketing analyst at Mandalay Bay. It was here she met Josh Swissman.

"He was the first person in the gaming industry that took a chance on me," Rankin says. "Throughout my career he has been the single most influential person. He invested his own time and effort in my learning and growth."

Each member of the Swissman team met with Rankin weekly for updates.

"Yet he insisted we come prepared with questions whether they related to work or personal. I learned casino analytics, staffing, yielding and so much more working alongside Josh," she says.

Rankin received promotion after promotion, finally joining Konami in 2012 as senior business operations analyst, R&D. A little more than five years later, Konami promoted Rankin to her current position of director of business development.

"I am passionate and driven in all that I do. I



am fortunate that others have recognized my dedication and provided opportunity for growth," she says.

But the pathways have not always been smooth. During Rankin's transition from retail to gaming, the economic downturn of 2008 impacted Las Vegas with layoffs. "But I kept my job."

Her team had to absorb different roles, focusing on revenue and profits.

"There were long hours, trials and tribulations, but all in all it

was worth it," says Rankin, who relaxes by running, biking, going to the beach, and enjoying time with pug Lucy.

In the transition from MGM Resorts to Konami, Rankin went from a position with established connections to one where she knew no one in the company.

"It was a challenge to sit back and observe," she says. "I had to gain the team's respect, learn new processes and new products. I realized I only knew a small piece of the gaming puzzle. At Konami, I have gained such a broad spectrum of gaming and all its intricacies over the past eight years. I am so glad I made that leap of faith."

Today, Rankin oversees the strategic positioning of Konami's casino management system Synkros, within new and existing markets. "I assess development strategies for establishing partnerships with other companies for specific products, alliances or joint venture opportunities. In addition, I act as an internal champion for customers."

Rankin sees her future as part of the rapidly evolving technology in the world of gaming.

"I want to be part of the transformation on how customers engage with technology," she says. "In the same regard, I want to empower the operators with tools, enabling them to be successful in a new landscape, whether that's physical, online or any other platform."

She has simple advice to those who follow in her footsteps in the transformative world: "Be flexible and nimble, absorb like a sponge and learn. Listen more and speak with thoughtfulness."

—William Sokolic



Doubt Me. Please!

Adam Wexler

CEO, Performance Predictions

Adam Wexler has always operated by the motto, "Doubt me, please do." Early in his career, he fed off hearing from those who didn't believe his hard work and late nights would pay off, constantly challenging himself to quiet the doubters by working harder, learning what he could from any failure, and applying the lessons he learned to each new endeavor. He now enjoys hearing words like "resilient" or "does not accept no" to describe his execution style.

After graduating from the University of Georgia, Wexler debated whether to pursue a career in either the sports industry or the music industry. With the digital music craze, he saw the opportunity for entrepreneurial disruptors like him to enter the music industry and make a name for himself. While his initial venture failed, the marketing he and his team did for it led them to productize those efforts, evolving into a successful enterprise social media software company, serving many Fortune 500 brands.

In late 2014 as Wexler was entering the fantasy sports world and embarking on his third venture, the new Atlanta Hawks CEO simultaneously brought him on board as part-time digital expert consultant. Instead of working his way up from the bottom, Wexler found himself working directly with the C-suite from the Hawks at the age of 28.

Wexler continued to experiment with new fantasy sports technology solutions, and in January 2015 incorporated the legal entity SidePrize LLC, named around his second product, SidePrize, an award-winning digital treasurer solution for skill-based games like fantasy leagues.

By 2018, Wexler and his partners decided to do business as Performance Predictions, as they felt the name better encompassed their suite of fan engagement solutions, including its flagship game, PrizePicks, and the two products that pre-

ceded it. Wexler has been CEO of the business since its origins five years ago.

When looking back on his career, Wexler is most proud of never giving up and maintaining his entrepreneurial beliefs even when things looked bleak. His decision to remain on the entrepreneurial path was the biggest one he's made in his life. Through it all, Wexler learned that the success of any company starts with its culture. He believes it is the most important and biggest competitive advantage an organization can have, and hopes that this mentality is leaving an indelible impression on the PrizePicks team.

Wexler looks forward to the days when he'll have more time to mentor other entrepreneurs, but for now, he strives to lead by example. He dreams of seeing a Bill Belichick-like entrepreneurial tree emerge from those who have allowed him to lead them during their careers.

With many 20-somethings leading departments at PrizePicks right now, Wexler makes every effort to avoid considering age as a factor when seeking the ideal candidate, and he's found this mentality has often been advantageous for the organization's youngest leaders. He says, "While they may be young, they grew up with technology, so their acumen for leveraging the latest and greatest technology resources is better than the generation before them."

For those looking to enter the industry, he thinks the obvious answer is to get involved with legalized sports betting. "There are going to be so many new jobs created over the next decade, and so many companies can't find anyone with the ideal experience," he observes. "Companies in the ecosystem will look for the next best thing, which may often be those who currently have e-commerce experience for a digitally based company." He says he also would advise students studying journalism to explore the industry, as there are so few established voices in legal domestic sports betting.

As an Emerging Leader of Gaming 40 Under 40 honoree, Wexler says it's an honor to be recognized for making a name in the broader gaming industry, and he can't wait to see what the future holds for PrizePicks. The company's current ambition centers around building the most premium sports betting brand in the U.S. market, and along the way, building the most desirable place to work in Atlanta, where they are headquartered.

"In the short term," Wexler muses, "we look forward to building the new age of daily fantasy sports."

—Allison McCoy, Vice President of Business Development, The Innovation Group

Taking the Challenge

Lucas Cai

Director of Casino Operations, Marina Bay Sands

Lucas Cai studied economics at Nanyang Technological University in his native Singapore. The degree launched his career in finance. A short-lived career, it turns out.

Cai wanted something more challenging.

That something was the gaming industry. The challenge came through an opportunity to work for Marina Bay Sands as a global gaming analyst in 2013.

"As the gaming industry was relatively new in Singapore at that stage, I was especially intrigued by the mechanics of the industry, and that was what sparked my interest to make a switch from finance," he says.

After more than two years as an analyst with Marina Bay Sands, Cai was promoted to his current position as director of casino operations, a comparatively lofty title in such a short period of time.

In that capacity, Cai oversees VIP and mass casino areas for table games and slot operations, understanding and analyzing performance in order to develop casino strategies and revenue enhancement initiatives. The goal is to improve profit margins and cost savings.

It wasn't always smooth sailing for Cai since joining Marina Bay Sands.

"I was given the opportunity to work with and lead new teams that I had little expertise in," he says. "As a result, it was always a concurrent learning and leading experience for me: to pick things up from the team, and to provide guidance and gain their respect at the same time. It was always a steep learning curve for me, but it was through these rotations that I truly built my foundation of the different aspects of gaming."

Cai, who plays soccer with friends as a diversion from the work day, credits numerous individuals who have helped his growth along the way.

"I would like to give special mention to Andrew MacDonald, Jeremy Bach, Anne Chen and Baybars Oral, who provided me with multiple opportunities from the onset, pushed me out of my comfort zone to reach my potential, and gave me valuable guidance in my professional growth in the gaming industry," he says.

As for the future, Cai sees a career pathway at Marina Bay Sands, especially given the size of the organization.

"It is definitely a dynamic full of prospects. I've gained experiences from my mentors and would like to contribute where I can. As we move into a new decade, I believe the gaming industry in Singapore will continue to evolve, and I would like to be part of this transformation," Cai says.

A similar career path is open to anybody with the right attitude. His advice is to be open to various chances that may come along.

"Give your best to them. Each of these embarkations allows us to accumulate the necessary experiences and learnings, and are small steps we take to ready us for the next role."

—William Sokolic



"As we move into a new decade, I believe the gaming industry in Singapore will continue to evolve, and I would like to be part of this transformation."

by Frank Legato

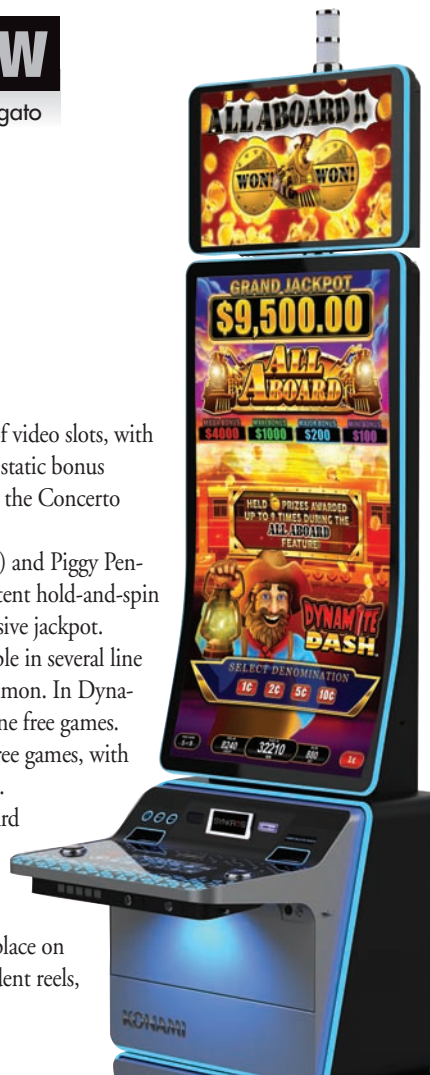
All Aboard Konami Gaming

Konami is releasing the All Aboard series of video slots, with a single-level linked progressive and four static bonus awards, with two base games featured on the Concerto Crescent cabinet.

The base games are Dynamite Dash (pictured) and Piggy Pennies. Each features a free-game bonus and a persistent hold-and-spin bonus feature, the latter tied to the linked progressive jackpot.

Both base game are five-reel video slots available in several line configurations, with a 50-line setup the most common. In Dynamite Dash, any three dynamite symbols trigger nine free games. In Piggy Pennies, three coin symbols trigger five free games, with the middle three reels becoming one giant symbol.

The main feature in both games, the All Aboard feature, is triggered by six or more scattered train symbols. When the feature is triggered, all the train symbols transform into credit awards. After the win is registered, the credit awards remain in place on the reel array and all other spots become independent reels, re-spinning for three free spins.



Each time an additional train symbol lands, it reveals a new credit award, and all of the credits on the board are awarded again. The free-spin count returns to three, and the feature continues, re-awarding the total credits on the board with each new train symbol.

The feature continues until no free spins remain, or until the entire screen is filled with credit awards. If train symbols are landed on all 15 reel spots, the player is awarded the linked Grand Jackpot, which resets at \$7,500.

Manufacturer: Konami Gaming
Platform: Concerto Crescent
Format: Five-reel, 50-line video slot
Denomination: .01, .02, .05, .10, .25, 1.00
Max Bet: 880
Top Award: Progressive; \$7,500 reset
Hit Frequency: 28%
Theoretical Hold: 8%, 10%

The Karate Kid & The Mask Everi

Everi is marketing two licensed games together in its Premium Series, both on the Empire DCX premium video cabinet. Dedicated sign and lighting packages with flexible configurations are available that can include overhead LCD signs, backlit fillers and end cap wedges in three-pod and back-to-back configurations.

The Karate Kid features the theme of the 1984 film starring Ralph Macchio and Pat Morita as a bullied kid and his karate mentor. The Mask features Jim Carrey's 1994 comedy about a mask that transforms its wearer into a hip superhero or super villain, depending on the wearer. Both themes are woven into line video slots, The Karate Kid a 30-line game on a three-by-five array; The Mask 40 lines on a four-by-five array.

Each game has unique bonus features woven around its film. The Karate Kid features "The Karate Tournament" free spins, with a bonus wheel that spins to lock in a progressive jackpot tier. Also featured is the Wild Strike Bonus, in which the reels split into up to six separate arrays, adding wild reels and giving more chances to win progressive jackpots.

The Mask also features a free-games bonus with a jackpot wheel spin. There are six different progressives that can be won, the top resetting at \$100,000; and a pick bonus with a prize ladder that tops out at 80,000 credits.



Manufacturer: Everi
Platform: Empire DCX
Format: Five-reel, 30-line or 40-line video slot
Denomination: .01
Max Bet: 400, 450
Top Award: Progressive; \$100,000 reset
Hit Frequency: 27.74%-30.66%
Theoretical Hold: 6%-16%



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Imperial 88: Tiger Lord

AGS

This new game on the Orion Portrait cabinet is themed around a Chinese lord character, presented in colorful artwork on the high-definition, flat-screen monitor. The game features a four-level progressive triggered through one of three separate bonus events.

The base game is a ways-to-win scatter setup in the PowerXStream series. Wins through adjacent symbols on the four-by-five reel array feature combinations centered around the game's two main characters, the lord and his tiger.

Bonus events include a free-spin bonus, a "Hold and Win" bonus and the progressive event, called the Imperial Jackpot Bonus.

Three scattered bonus symbols trigger eight free spins, along with a credit award according to how many triggering symbols landed. If a wild symbol appears on a reel in a free spin, all symbols on that reel become wild. Three bonus symbols trigger an additional eight free spins. Either of the other two bonus events can be triggered on a free spin.

Six or more prize symbol in any position trigger the Hold and Win Bonus. The prize symbols that initiated the bonus lock in place and all other positions re-spin an initial five times. Additional prizes lock into position during the spin, which also can reveal "Instant Win," or 2X and 8X multipliers. Additional prizes also reset the free spins to five.

The Imperial Jackpot bonus reveals a screen of coins, which are touched to reveal any of the four jackpots. Matching three jackpot symbols wins that amount, including a top progressive resetting at \$10,000.

Manufacturer: AGS

Platform: Orion Portrait

Format: Five-reel, ways-to-win video slot

Denomination: .01

Max Bet: 880

Top Award: Progressive; \$10,000 reset

Hit Frequency: 30.38%

Theoretical Hold: 2.86%-11.94%



Wealth of Coins

Aruze Gaming

This new game on Aruze's Muso Curve 43 portrait cabinet features an expanded reel array with six symbols on each of the two outer reels and seven symbols each on the middle three reels. There are 34 paylines on this array, and multiple mystery bonus events and a progressive picking bonus, all centered around the wild gold coin symbol.

When one or more of the wild gold coin symbols appear, it can trigger any of five bonus events, including the progressive jackpot feature. Mystery events include Block Wild, in which two to six randomly determined block of symbols change to the wild gold coin symbol. Each block comprises four adjacent symbol positions.

Another mystery event is Random Wild, in which up to six randomly determined symbols on reels 1, 2 and 5 and up to seven each on reels 3 and 4 change to the wild symbol. A similar mystery event changes all symbols on two or three reels into wild symbols.

There is a free-spin event in which three or more scattered bonus symbols trigger eight free games, and the Jackpot Feature, in which icons corre-

sponding to each of four progressive jackpots are hidden behind 12 coin symbols. The player matches three icons to win the corresponding jackpot, the top prize resetting at \$10,000.

The manufacturer offers nine other jackpot configurations, up to one with a top Grand Jackpot resetting at \$350,000.

Manufacturer: Aruze Gaming

Platform: Muso Curve 43

Format: Five-reel, 34-line video slot

Denomination: .01

Max Bet: 880

Top Award: Progressive; \$10,000-\$350,000 reset

Hit Frequency: Approximately 50%

Theoretical Hold: 3.91%-14.8%



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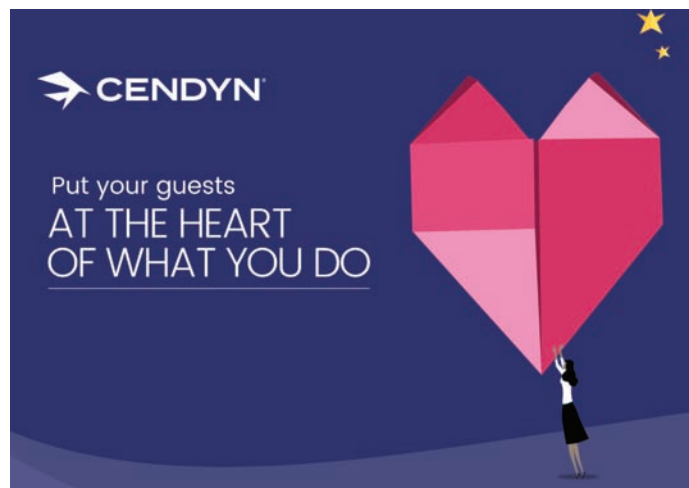
MANUFACTURER: Cendyn

Cendyn is the leading cloud software and services provider for the hospitality and gaming industry. With a focus on integrated customer relationship management (CRM), sales technology and revenue strategy systems (RMS), Cendyn drives sales, marketing and revenue performance for tens of thousands of hotels and casinos across the world.

Cendyn's unique offering aligning both CRM and RMS platforms allows hoteliers to create a one-of-a-kind experience for every guest, while moving the needle for every revenue source on property.

Harnessing the power of CRM and RMS dataset alignment can future-proof a property. By merging customer spend data with behavioral information from multiple touchpoints and channels, hoteliers are able to create a single, robust guest profile that includes specifics such as demographics, preferences, source markets, visited locations—getting as granular as preferred room temperature and pillow type.

When a team has access to all this data, they can create highly personalized experiences that are proven to drive guest retention and drive loyalty. With 80 percent of customers willing to make a purchase when they're offered custom-tailored experiences, those who utilize this method



see an improvement in demand forecasting, marketing and loyalty programs.

An integrated solution puts the operator in the driver's seat to determine the optimal rate to charge for those customized services, revenue managing them in the same manner you do your room rates to help increase profitability throughout the guest travel journey. The coupling of rich guest profiles with integrated data points from various property systems, including gaming, gives hotel-casinos a superpower to truly know and understand their most valuable guests.

For more information, visit cendyn.com.

Proactive Service Recovery

PRODUCT: Zingle

MANUFACTURER: Zingle by Medallia

In the age of experience, service is more important than ever. Casinos work around the clock to maintain and improve the service they provide to keep guests engaged, on property and spending money. But a recent consumer research study found that only 25 percent of hotel guests report all issues that impact their experience, meaning three out of four guests do not.

How can operators fix what they don't know is broken? In an integrated casino resort, with multiple retail outlets, meeting space, spa and more, mistakes are bound to happen. But they don't have to be fatal.

By leveraging Zingle's intelligent messaging platform, casinos can blend high tech with high touch to better identify, respond to and recover from issues in real time, while guests are still on property. Otherwise, you may not find out there's a problem until you see a negative online review and the customer is lost for life.

Zingle's platform enables casino operators to proactively engage, support and respond to customers in more meaningful and impactful ways. It combines artificial intelligence and machine learning with workflow automation and mobile messaging to empower casinos to deliver exceptional customer experiences in real time.



Operators can boost engagement and increase guest satisfaction by having real conversations with customers throughout their entire stay on the channels they prefer. Staff efficiency is increased by managing multiple conversations at once and streamlining operations by automating responses and workflows through AI and intent recognition.

Ancillary and upsell revenue can be increased with relevant and personalized offers targeting specific guest segments at the right time. Better investment and staffing decisions come from conversational analytics that provide insights into trending topics, guest engagement and staff responsiveness.

Zingle's platform seamlessly integrates with other systems and is simple for staff to use. An intuitive dashboard and inbox consolidates messages across all the messaging channels customers use and makes response easy with customizable templates, automations and AI.

For more information, visit zingle.com.

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Group Think and Gaming Conferences

More communication with the end user is always beneficial

By Richard Schuetz



The signal is the truth. The noise is what distracts us from the truth.

—Nate Silver

Several years ago, I was in Atlantic City at a gaming conference and there was a panel featuring four iPoker players. What amazed me about this was it was a most reasonable discussion to feature. What also amazed me was how rare it was to talk about issues at a conference with the actual consumers of the product.

The folks on this panel were outlining a whole series of faults and frustrations with trying to interact with the iPoker systems, and this seemed like it should be terribly interesting and important to everyone at the conference. Since then, I have not seen this type of experience repeated.

I also recently had a personal experience with trying to interact with the poker and sports betting operators in Pennsylvania. I was in Pennsylvania for approximately three weeks during the holiday break and joined both a sports wagering and poker site. I was very nonplussed by the encounters.

The sports betting site could not work with my Mac laptop; the site crashed repeatedly before big betting events; and the withdrawal process was weird in that it would not allow me to take my winnings out of the system, and this was not a result of any terms and conditions of a promotion.

With the poker site, I suffered numerous geolocation faults while clearly being within the state; I needed to delete and reload the iPad app before I used it each session; and I am still working to get my money out of the system, for my earlier efforts were met with a notice that the withdrawal system was not working.

Now, it appears to be working, but the site seems to be having issues with my request to withdraw that make no sense to me. On both sites when I made an effort to contact customer

support I was at the end of a *very long* queue (i.e. 49th). I had no idea as to how bad the delivery of the iGaming product was, and certainly none of the many conferences I have attended gave me this insight.

When I was the CEO of a Las Vegas casino, I spent a lot of time on the casino floor, because I was interested in what my fellow employees and the market were thinking and experiencing. While on the floor, many guests would approach me with a complaint, sometimes in an agitated and angry state, and when they were finished with their complaint, I would always thank them.

“ Operators should understand complaints are precious packages of data that allow for improvement in the product or process, and so those complaints should be aggressively mined. ”

I would thank them because they gave me important information that would allow me to improve the delivery of my product. I would also prod the vice presidents of the property to quit sequestering themselves in their offices and get out into their operations, because I was getting better information from our customers for free than I was getting from a bunch of expensive vice presidents sitting in their offices.

From all of these experiences, it seems curious to me that our conferences do not avail themselves more to hearing from people who are involved in

interacting with the products the industry is offering.

I attend a great many conferences, and during these conferences I hear all kinds of wonderful things that are taking place in the gaming space. It is a rosy world indeed, yet from what I hear from players, and what I experienced myself, all is not all rosy.

While some of the player frustrations address business decisions by the operators, or the decisions made by politicians, many other frustrations are simply that the ability of the sites to work as advertised is fake news. In the case of the poker site, it took four days before I received a generic acknowledgement that they knew I was having problems with the withdrawal process, and that my concern took so long to address because there were a number of complaints. It also seems the ability of the sites to effectively communicate with their markets is dismal. It seems the whole space should care about these issues.

I understand conferences are designed to make money and one of the main sources of this money is sponsorships. The flip side of this is those sponsors pay money so they can get on panels, or control who does get on panels, and these folks are not in the mood to have folks complaining about the products being delivered.

This creates a world in which all does in fact appear rosy. It is also a mythical world, a world in which the agenda becomes a slave to sponsorship dollars, and no one wants to bite the hands that feed them. I think this is unfortunate.

The problem with continuing to operate in an echo chamber is a fool's errand for the future of gaming, and the industry should become alive to this reality. Operators should understand complaints are precious packages of data that allow for improvement in the product or process, and so those complaints should be aggressively mined.

If the goal of the conferences is to make money, they are on course. If the goal of the conferences is to educate and provide an environment where operators can gain valuable insights from disparate parts of their markets, they are failing. It is as if the conference scene has become part of a company perk, and the learning function is to take a back seat to the ego stroking and the play time that seems to be the goal of the modern conference attendee.

It is important to understand that if the disgruntled consumers are not listened to by the operators, they will turn to unregulated environments, the press or government. One only needs to look across the pond to see this reality. Clearly, disgruntled consumers are not going to ban together to gain access to the conference circuit by spending sponsorship dollars so as to inform the operators that aspects of their operations suck, and that is too bad.

Over my long tenure in and around the gaming industry, I have heard numerous explanations for weak company and industry performance. The blame is placed on the market, the economy, and a whole variety of different things that allow the company to play victim. In reality, often the firm had no earthly idea that they were doing things badly, and they had no earthly idea as to what they were doing badly because they had isolated themselves from important market signals and opted to surround themselves with the noise.

This is a dangerous path on a grand scale, and if the conferences are not going to allow access to this segment, it might be time to send fewer executives to the conferences and instead make them go out and visit with their consumers.

Richard Schuetz started dealing blackjack for Bill Harrah 47 years ago, and has traveled the world as a casino executive, educator and regulator.

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HARD ROCK SACRAMENTO INSTALLS SG SYSTEMS, SLOTS

Scientific Games Corp. was chosen by Hard Rock International for its newest casino property, Hard Rock Hotel & Casino Sacramento at Fire Mountain, to supply its full complement of casino management system products, as well as a full library of slot games, table games and utility products.

Fire Mountain opened with more than 1,800 slot machines and table game positions, all managed and monitored by a suite of Scientific Games Systems products.

Among them are SDS, an integrated slot accounting system that continually monitors slot machines, other gaming devices, and customer gaming activity; the advanced Business Intelligence application, which analyzes data gathered throughout the enterprise and delivers an improved understanding of table and slot performance, as well as player behavior and values; iVIEW 4, Scientific Games' next-generation player interface; the Elite Bonus Suite, which automates promotions and player loyalty programs; and TableView, which allows floor staff to enter real-time player ratings and issue comps and markers at the gaming table using a mobile device.

Scientific Games supplied more than 20 percent of Hard Rock Sacramento's slot machines, including Dancing Drums, Jin Ji Bao Xi, Ultimate Fire Link, Jinse Dao, Lock It Link and Quick Hits, along with a number of the company's newest license branded titles, all featured in top-performing cabinets like the TwinStar J43 and TwinStar Wave XL, as well as the popular TwinStar 3RM, Alpha Pro Wave, and the immersive Gamefield 2.0.

The company also provided its proprietary table games and utility products for the casino, including Three Card Poker w/ Six Card Bonus, Ultimate Texas Hold'em, Blazing 7s Blackjack and Face Up Pai Gow Poker, along with its shuffler and utility products like the MD3 multi-deck shuffler, the i-Deal Plus and DeckMate single-deck shufflers, and the Safe-Shoe intelligent shoe.

DESERT DIAMOND ARIZONA CHOOSES JCM

The new Desert Diamond Casino West Valley in Glendale, Arizona opened in February with JCM Global products and solutions in place across the 75,000-square-foot casino floor. The property is owned and operated by the Tohono O'odham Gaming Enterprise.



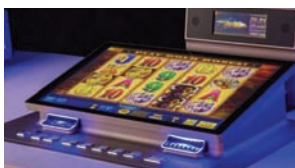
The massive, property-wide installation of JCM products, systems, and digital signage solutions is an expansion of a partnership between JCM and Tohono O'odham that dates back 13 years.

On the casino floor, each gaming device is equipped with the award-winning iVIZION bill validator, GEN5 Thermal Printer and ICB Intelligent Cash Box system. The investment in the iVIZION and GEN5 products enables the property to expand to the company's fully connected Promonet and Fuzion system solutions, according to JCM.

The new property features JCM Global Digital Signage Solutions at the new sports bar and inside the bingo and poker rooms. At the sports bar, action is featured on five giant LED video walls. The poker room features 16 LCD displays suspended from the ceiling in unique pod configurations, giving players the ability to enjoy a game without missing broadcasted sporting events. Additionally, in the bingo room, a 16.4-foot-by-11.4-foot LED video wall will display bingo action along with a variety of live programming.

PT'S TAVERNS DEBUT ARISTOCRAT BAR-TOP UNITS

PT's Taverns locations in Nevada have debuted the first bar-top gaming machines produced by Aristocrat Leisure Ltd., the Winner's World multi-game unit, at all of the company's 66 locations. Developed with state-of-the-art technology and graphics, Winner's World offers multiple games including poker and



bingo, as well as Buffalo Slots and Buffalo-themed Keno, each based on Aristocrat's popular Buffalo game series. Innovative features include floating 23.5-inch LED screens, USB charging ports and "smart-drink" lights that can easily remind bartenders when it is time to connect with players.

VIRGIN CRUISE SHIPS SELECT KONAMI SYNKROS

Konami Gaming's award-winning Synkros casino management system has been selected by Virgin Voyages, the new lifestyle brand from billionaire entrepreneur Sir Richard Branson.

The brand has announced plans to launch four ships, leading with the *Scarlet Lady*, which is scheduled to set sail in April. Konami will deliver its Synkros player tracking system, combined with its newest games on the KX 43 cabinet, to provide un-



paralleled entertainment, engagement, and convenience for sailors onboard.

Synkros' agile architecture, real-time open integrations and dependable performance are ideally suited for operating on the open seas. It also offers robust marketing capabilities with an intuitive bonusing engine to deliver an elevated experience for sailors throughout the casino.

POINTSBET SPORTSBOOK NOW IN KANSAS

Global sportsbook operator PointsBet has entered an exclusive primary skin agreement with Kansas Crossing Casino in Pittsburg, Kansas. The agreement allows PointsBet to provide retail and online sports wagering in the Sunflower State, pending regulatory approvals.

PointsBet and Kansas Crossing will work in tandem to build out a multi-faceted sports entertainment venue, which will include a sports bar, multi-screen video and odds display wall, additional casino gaming options and on-site viewing parties for major sporting events, providing the state with a premium sportsbook option in addition to PointsBet's online wagering product.

Launched in the U.S. in January 2019, PointsBet is a rapidly growing sportsbook with a bettor-

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PA CASINO LAUNCHES EVERI ONLINE GAMES

ParxOnline.com, the online arm of Pennsylvania's Parx Casino, has launched five of Everi Holdings' popular stepper titles, including Double Jackpot, Meltdown, Smokin' 777, Tiger 7s and Vortex.

Everi's Remote Gaming System (RGS) currently supports a library of more than 30 titles, which the company expects to continue to expand on an annual basis.



Everi designed its proprietary RGS using state-of-the-art system architecture enabling the company to develop and distribute player-preferred content directly to operators.

This content includes award-winning three-reel mechanical games and video slots, all built to deliver the exact same look, game features and math as their land-based counterparts with the added player feature to play games in landscape or portrait mode. Everi's RGS offers robust data analytics and real-time reporting and can support custom-built games for operators.

GEWETE LAUNCHES CASH CENTRE DELUXE

GeWeTe recently introduced its new high-security cabinet, Cash Centre Deluxe. The firm's in-house development team has allowed for a customized front panel to enhance the design and make it unique to each operator. The cabinet features a 24-inch touch screen and illuminated side panels to ensure that it



stands out on any gaming floor.

With a capacity of 2,700 banknotes and up to six coin hoppers, Cash Centre Deluxe has a range of multi-functional features enabling it to accept as well as paying out banknotes and coins. Connection to the majority of casino management systems allows the validation of TITO tickets or electronic purse systems, including QR and barcode systems for AGCs, casinos and sports betting applications.

The additional benefit of bank card acceptance allows players to purchase TITO tickets using a debit card. As with all PC-based models, Cash Centre Deluxe has the ability to be used as a "staff cash desk," enabling staff to withdraw and deposit both notes and coins via a dedicated card and PIN, in the process offering enhanced levels of security to both site and staff.

NOVOMATIC SUPPLIES FRENCH CASINO

Novomatic AG, one of the world's largest international producers and operators of gaming technologies, now has a strong footprint at the Golden Palace Casino in Boulogne-sur-Mer, France, owned by Belgian Class II operator Golden Palace Group. The property reopened under its new own-



ers in mid-2019.

Featured on the slot floor are VIP-style machines like the V.I.P. Lounge 2.32, V.I.P. Lounge Curve 1.43, and the Novostar V.I.P. Royal 2.65, each with an integrated chair providing maximum comfort for the guests. The Panthera 2.27 offers players the Cash Connection Link, and Panthera Curve 1.43 boasts the latest curve content in the Novo Line Interactive Concurve Edition 4 as well as a great variety of single games with titles such as Asian Dragon Hot, Great American Wilds, Voodoo Fortunes, and many more. The Gaminator Scorpion 2.24 rocks the floor with the Thunder Cash Link and Superia-Games Premium Edition 2.

The ETG area of the Golden Palace Casino boasts a Lotus Roulette Pro unit with six inte-

grated player positions plus a Novo Line Novo Unity II installation for electronic Roulette with 14 connected Executive SL terminals. Also, the myACP casino management system has been implemented at the casino with a number of modules and functionalities that facilitate the smooth and efficient casino operation in full compliance with the provisions of modern data processing regulations, anti-money laundering standards and the French gaming law.

GLOBAL PAYMENTS MARKS GROWTH

As both iGaming and sports betting become more widely accessible, Global Payments Gaming Solutions reported 2019 growth exceeding 50 percent within the U.S. iGaming market.

Serving more than 3 million registered players and adding more than 30,000 monthly, Global Payments' provision of credential-free enrollment reduces friction and enables expanded online play.

Global Payments' VIP Mobility solution enables frictionless responsible gaming and an enhanced user experience for players and is currently being piloted in a host of casinos across the United States.

For land-based casinos, Global Payments supports a significant number of operations, having signed key deals to deploy self-service options that enhance operator profitability and making the cage more efficient. Additionally, the company continues to invest in and deliver new functionality like dynamic currency conversion, and new payment forms, such as cash advance with American Express.

This year, Global Payments added new benefits to its compliance-management solution, VIP Shield, an open API solution that is compatible with any gaming system. The solution now provides users with enhanced Title 31 and IRS reporting, and better visibility between the cage, surveillance and finance departments.

IGT LINK WINS AWARD

The Ying Cai Shen progressive link from IGT won the award for Best Electronic Gaming Solution at the G2E Asia @ the Philippines Product Awards, held in Manila December 3-4.

Ying Cai Shen is IGT's latest multi-level progressive theme available on the CrystalCurve cabinet. The Ying Cai Shen theme combines player-favorite Expanding Reel Matrix and Gold Coin collection mechanics with innovative Hold-and-Respin and Lock-and-Respin jackpot features.



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PEOPLE

PENN NATIONAL TAPS FORMER APPLE EXEC AS CFO

Penn National Gaming, Inc. announced the appointment of David Williams as executive vice president and chief financial officer effective March 3, subject to customary regulatory approvals.

Williams, who joins Penn National following more than 20 years as a finance executive at Apple Inc., succeeds William (B.J.) Fair, who announced his resignation in September. Williams will report directly to Penn National Chief Executive Officer Jay Snowden.

In his new role at Penn National, Williams will be responsible for all of the company's financial and treasury functions, as well as helping to develop and support the company's strategic growth initiatives, including its burgeoning iGaming and sports betting businesses.

Since 2012, Williams has served as CFO and controller of Apple Inc.'s Claris division (formally known as FileMaker). Claris is Apple's B2B software subsidiary, which provides the leading platform for developing custom apps that are deployed on premise or in the cloud by businesses worldwide.

BLACKHURST JOINS UNLV GAMING INSTITUTE

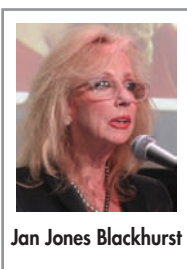
Former Caesars Entertainment executive Jan Jones Blackhurst is joining the University of Nevada, Las Vegas' International Gaming Institute as chief executive in residence.

In her new role, she will expand the institute's executive development program, a highly regarded training ground for future industry professionals. It's part of an initiative aimed at promoting diversity and inclusiveness within the executive ranks of gaming and hospitality.

Blackhurst resigned as Caesars' executive vice president of government relations and corporate social responsibility at the end of last summer, ending a 20-year career with the Las Vegas-based casino giant in which she was highly regarded as a champion of social responsibility.



David Williams



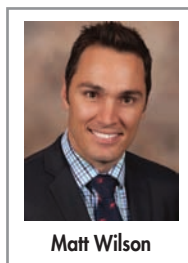
Jan Jones Blackhurst

FORMER ARISTOCRAT EXECS JOIN SG

Global gaming supplier Scientific Games has beefed up its management team, recruiting several executives from rival Aristocrat Technologies.

Former Aristocrat Technologies President and Managing Director Matt Wilson has joined the company as executive vice president and group chief executive, gaming. Siobhan Lane, formerly senior vice president of marketing and gaming operations at Aristocrat, joined in February in the new position of chief commercial officer, gaming. And Connie James, former chief financial officer of Aristocrat's gaming division, became CFO, gaming for SG on January 6.

Derik Mooberry, who had served as the gaming group chief executive, will fill a strategic advisory role to support the new leadership team.



Matt Wilson

AGUA CALIENTE CASINOS ANNOUNCE PROMOTIONS

Aqua Caliente Casinos last month announced that Michael J. Facenda, vice president of marketing for Agua Caliente Casinos for the past two years, has been named senior vice president and general manager of the company's third casino, Agua Caliente Casino Cathedral City, which will open in the fall.

Facenda's 30-plus years in gaming have included general manager and vice president of marketing roles at casinos all over the U.S., focusing on advertising, branding, public relations, loyalty card and database operations, and quality service management. He also was vice president and general manager of gaming at Hoosier Park Racing and Casino in Indiana.

Agua Caliente Casino Cathedral City is rising in a 12.5-acre lot in Cathedral City, Riverside County, California. Besides 500 slots and eight gaming tables, it will have dining, bars, retail shopping, live entertainment and tribal offices.



Michael J. Facenda

PARADISE ADDS ALLISON AS SALES SVP

Paradise Entertainment, the Macau-based parent company of game supplier LT Game, has appointed Kelcey Allison, longtime executive and former CEO of Aruze Gaming America, as senior vice president of operations and business development

for the company's U.S. subsidiary.

Allison most recently was president and CEO of GSL Gaming Group. In addition to his time at Aruze, he served as senior vice president of sales, marketing and service for Ainsworth Technology Ltd.

At Paradise, Allison is principally responsible for driving business development on slot machines and electronic table gaming machines and equipment, and overseeing and leading sales operations, primarily in the North American gaming markets.



Kelcey Allison

GREENWOOD NAMES HAUSLER CEO

Longtime gaming executive Eric Hausler has joined Greenwood Racing, Inc., parent company of Parx Casino in Pennsylvania, as the company's new CEO. He assumed the post in January, replacing former CEO Anthony Ricci, who retired in April 2019.

GGB

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Jay Chun

Chairman & CEO, Paradise Entertainment



When Macau opened up casino gaming, several gaming suppliers became market leaders, including Paradise Entertainment. Chairman and CEO Jay Chun was very connected to Macau leadership. He developed an electronic table game that fulfilled all requirements of Macau regulations, and eased the crunch on live table games. Chun's Paradise is now making aggressive moves into the U.S. with Empire Gaming. He spoke with GGB Publisher Roger Gros at the GGB offices in Las Vegas in January.

To hear a full podcast of this interview, visit GGBMagazine.com. This interview was conducted prior to the outbreak of the coronavirus in China.

Over the past year, we've been reading about a lot of difficulties that Macau is suffering, but what is the reality on the ground there?

Jay Chun: We just had a new government take power on December 20. In a speech by the new secretary of the finance and the economy, he talked about the casino market and the forecast for 2020. He was thinking the mass market would be getting stronger, and he is very confident about the entire market. This is also very good news for our gaming equipment side, because expanding the mass market will be very favorable for the gaming equipment and EGMs.

It seems that we've seen the VIP segment shrinking quite a bit. Is it because the Chinese government is being a little stricter in terms of visitation to Macau, or transfers of money, or some other factors?

This one is a little bit more complicated. I think the most important thing is the entire regional economy, because we saw a little bit of a slow-down overall. But the things you mention all impact the VIP sector.

How about the trade war between the U.S. and China? What impact has that had on Macau companies?

Well, for the Macau side, half of the operators are American companies.

But the signing of the first stage of the trade agreement is good news for everyone. I think it will benefit the Macau market.

Has the opening of the bridge between Hong Kong, Macau and Zhuhai helped?

Yes, very much. From the Hong Kong airport to Macau, about 40 minutes. So I think this bridge has really helped those visitor numbers grow.

What's the opinion of the new chief executive, Ho Iat-seng? Did he have a view on gaming before he came into office?

No, he didn't talk too much about the gaming sector before his election, but in his early statements, he said he wants to continue business as usual for now. I don't think there will be too much change.

The Chinese government has always been interested in growing the non-gaming amenities in Macau, so it's not all focused on gaming. How do the casinos respond to that?

For the long term, the conditions of any license renewal will focus even more on non-gaming attractions, and how to diversify the economy. There are plans for theme parks, esports arenas and more meeting space.

Paradise Entertainment was one of the first companies in Macau to introduce electronic table games (ETGs) and electronic gaming machines (EGMs). How has that helped the casinos in Macau?

Typically, the ETG sector is the only sector still growing in the past 15 years. And it's still growing.

The Macau casinos face a lot of the labor issues—mainly the cost of labor, which is extremely high for table games, but also because they can never find enough dealers. Because of that, the minimum bet must be very high. In most Cotai casinos, the minimum bet is 100 Hong Kong dollars. It's very expensive.

ETGs give the operator the chance to offer a much lower minimum bet, which is helpful to the mass market and is something they can afford.

Are ETGs counted as slot machines or table games?

Those stadium ETGs are considered one big table that can be linked to up to 100 terminals.

Your ETGs can incorporate with all the systems involved in the casinos, which can often have different accounting systems or player rating systems.

Of course. In Macau, we do have many kinds of systems for the associated products and market. We also have some table systems that are similar to our slot systems. We have some cheating issues, and so we have several chip tracking systems.

How has technology improved ETGs since you introduced them 15 years ago?

There are many new developments that have come on the market in the past few years. And where we once had live dealers, there are now games where we have robot dealers that still use real cards. We call this semi-auto, because we still need a real dealer to change the cards.

You've been making a big push into the U.S. with Paradise and LT Game. Does IGT still distribute for you?

We sold the rights to IGT a few years ago for outside Macau, and it did well initially, but 2019 was much better. IGT isn't distributing the games anymore, but they still get a royalty.

You were also one of the founders of the Macau Gaming Equipment Manufacturers Association and have been involved in their trade show, MGS Entertainment Show. Why is that so important to Macau?

We promote this to the Macau government because we want to encourage them and educate them on how important the gaming equipment market, specifically the EGM market, is for Macau.



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