



Raving THIRD ANNUAL
INDIAN GAMING NATIONAL MARKETING SURVEY

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Key Findings from the 2019 Study

Overall, there are no major changes in the data from this year's study vs. last year, although there are notable findings primarily from new content in 2019.

1. **HOTELS:** The percentage of casinos with hotels increased from 61% to 73%. Last year 71% of casinos were planning capital expansion and that number was not significantly different this year at 67%. What did change is that last year most CapEx (capital expenditure) was focused on hotel building/expansion/renovation. This year the type of CapEx was much more diverse—from gaming floor expansions to RV parks to more food venues. (Pg. 23)
2. **STAFFING:** For the third consecutive year, staffing was the number one challenge facing tribal casinos. Staffing also moved from fourth place to second place as the factor that would most help casinos do a better job. (Pg. 22)
3. **CARDED PLAY:** There was some decline in the percentage of casinos that have 80% and over for carded play—it fell from 18% to 9% which is a significant change. The dominant category is still casinos that have 60 – 79% carded play, and this actually increased a little this year from 46% to 52%. (Pg. 25)
4. **Entertainment program profitability** fell from 11% to 9% to 6% in 2019. This seems to indicate that—while profitability declined—the percent of casinos that showed a loss also declined significantly from 44% the previous two years to 35% this year. Also, the percent of casinos that were able to break even on their programs increased from 43% to 52%. (Pg. 34)

Key Findings from the 2019 Study

5. **PROMOTIONS:** 23% of casinos are planning to increase promotions again this year; slightly less than last year's 26% planning to increase.
 - * Free Play still ranks as very important to 75% of casinos. A new question asks what percent of the monthly promotions budget is being spent on free play. On the lower end of the spectrum, 9% of casinos are spending less than 10% of their monthly promotions budget on free play, and the high end of the spectrum indicates that 17% are spending at least half of their monthly budget on free play. (Pg. 40)

6. **ADVERTISING/COMMUNICATIONS:** For the past two years, TV was ranked as the most effective way to reach potential new customers. This year, TV was tied with Digital/Internet at 23%. (Pg. 45)
 - * Phone app is also new content; 43% of casinos have developed and launched a phone app for their property.
 - * More new content is a table showing how casinos are allocating advertising budgets to each of the five main channels.

7. **GENERATIONAL MARKETING SEGMENTS:** Gen Y Millennials are seeing a modest increase in marketing focus, from 20% to 28%. The big increase is on Boomers, followed by Gen X (middle age). (Pg. 51)

Recommendations for 2019 Based on Study Data:

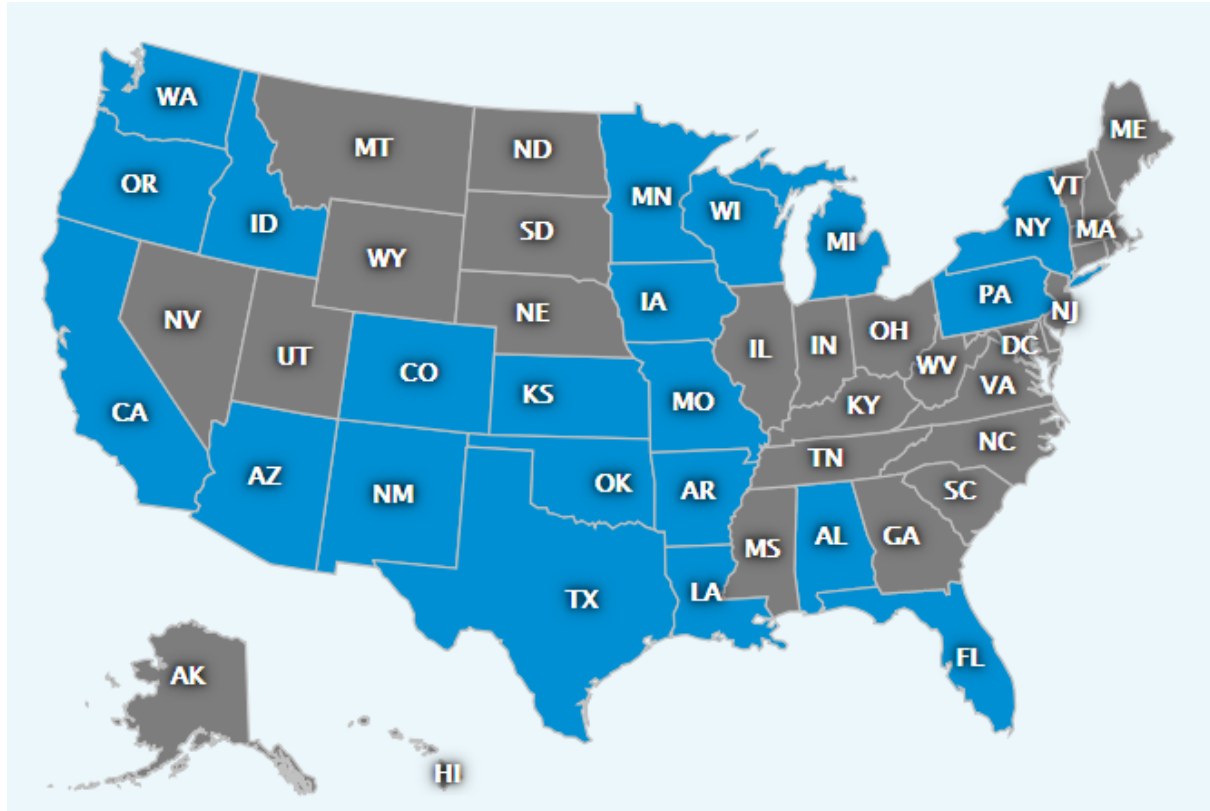
- 1. Competition continues to be a challenge in virtually all casino markets, with 82% of Tribal casinos saying they are in “very” or “somewhat” competitive markets. 28% of casinos don’t know how they’re doing financially compared to their competitors. Marketers need to be monitoring what the competition is doing with Promotions, Free Play and Continuity Programs. These are all components that many casinos are increasing focus on in 2019 and they’re all expensive to execute.**
- 2. Research and analyze marketing programs, your customers, and your competition. Business intelligence can help prevent costly failures. Although data shows that casinos are increasing research, it’s a very small increase. Less than one-third of casinos are doing Branding & Awareness Surveys so the tools that can help casinos be more successful are not being used as much as they could be by many casinos.**
- 3. Staffing is the number one challenge faced by 79% of casinos. It has held the top spot for three consecutive years. More emphasis needs to be placed on finding solutions to training, retaining and engaging employees. The level of support for marketing has been lowest by employees for three years and this is often apparent on the casino floor, with front-line employees and can negatively impact even the best marketing initiatives. 51% of casinos are now conducting Employee Engagement Surveys; even if your casino is in this category, it’s still important that top management acts on the findings to minimize staffing issues.**

Recommendations for 2019 Based on Study Data:

4. **Communication channels are still transforming. Marketers have to have ongoing efforts to test messaging channels and refine and adjust based on test data. For the past two years, TV was ranked as the most effective way to reach potential new customers. This year, TV was tied with Digital/Internet at 23%. Effectiveness of different channels is greatly impacted by your market area so use the data in this study as a guide and adjust it based on your unique area.**
 - **Email is increasing as a percent of the total marketing communications being sent by Tribal casinos but the growth is small. 54% of casinos are sending less than 25% of total messaging via email. That includes the 9% of casinos that are not using email at all in their messaging. Some types of messaging are more effective than others in email or texting format. Marketers need to continually test and refine these channel communications and results.**
 - **The study shows that 43% of casinos now have phone apps for their property. Determine if this works for your property. Find out what customers want in an app so it's not duplicating your website and just creating more expense. Some casinos have very successful apps so if you have a phone app, or are considering adding one, be sure that it fills a need and adds to the customer experience.**
5. **Generational segments are confounding to many casino marketers. Gen Y Millennials are a huge and growing group but they don't have the spending power of Boomers. Data from this study shows that most casinos are not going all out to woo Millennials but there is small growth in targeted spending. While you can't ignore Gen Y, the bulk of short-term marketing needs to remain focused on Boomers, which is the rationale for 51% of casinos increasing spend on this segment in 2019.**

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Response Distribution

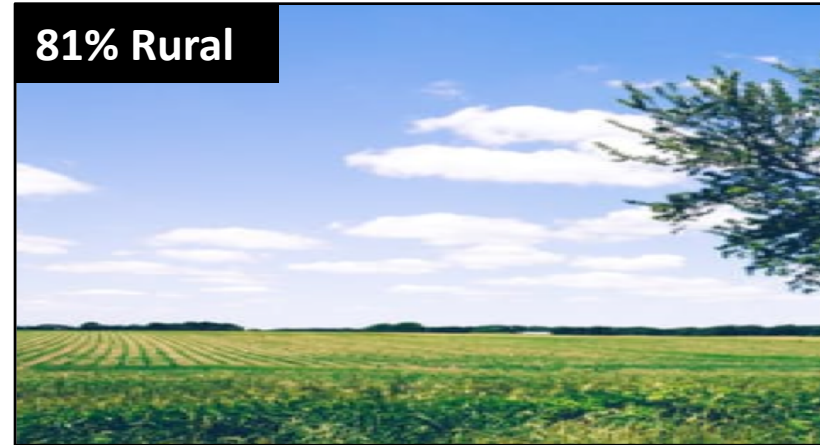


- **RESPONDENTS FROM 21 STATES**
- **83 TRIBAL CASINOS COMPLETED AT LEAST PART OF THE SURVEY**
- **65 TRIBAL CASINOS COMPLETED THE ENTIRE SURVEY**
- **COMPRISING 18% OF ALL TRIBAL CASINOS IN THE U.S.**

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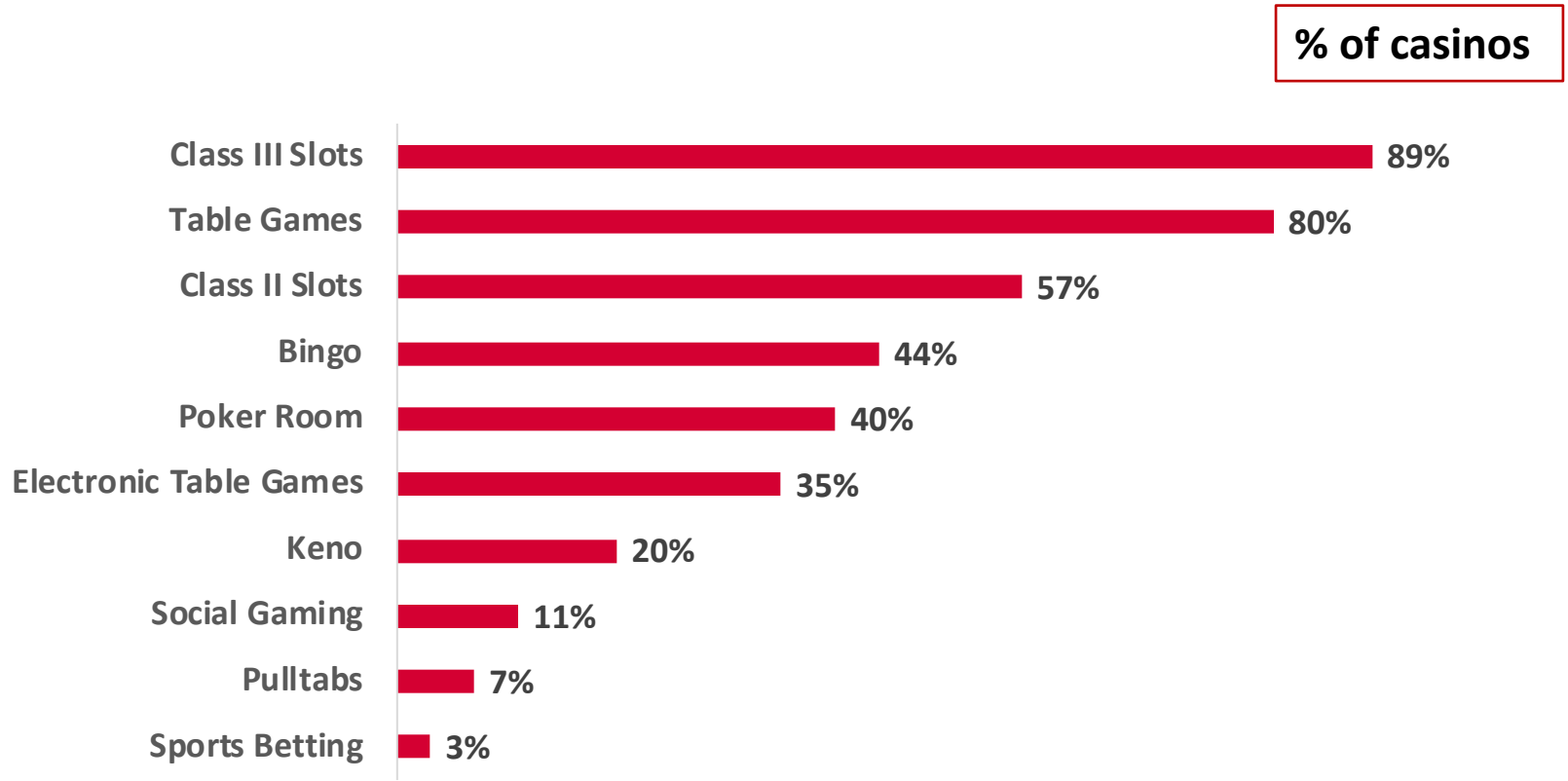


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The percentage of Indian casinos located in Urban or Rural areas has not changed since last year. The top three states represented in this year's study are Oklahoma, California and Washington. Indian casinos in 17 states participated in the 2019 study – from East Coast to West Coast, and Northern states to Southern states – all U.S. regions are represented by study data. (N=73)

Categories of Games

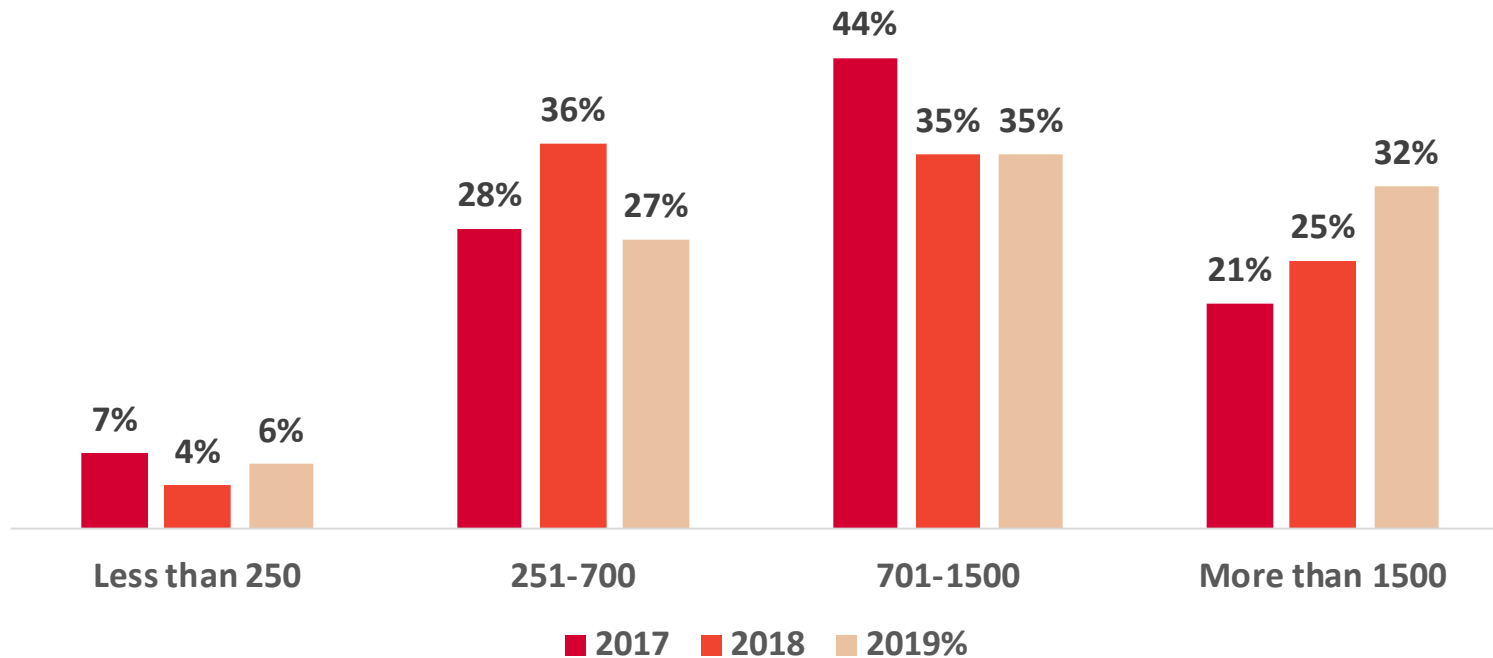


Social Gaming was added last year and was offered by 16% of tribal casinos. This year that decreased to 11%.

Sports betting was at 1% last year and increased to 3% this year.

(N=75)

Categories of Casinos Based on Number of Slots

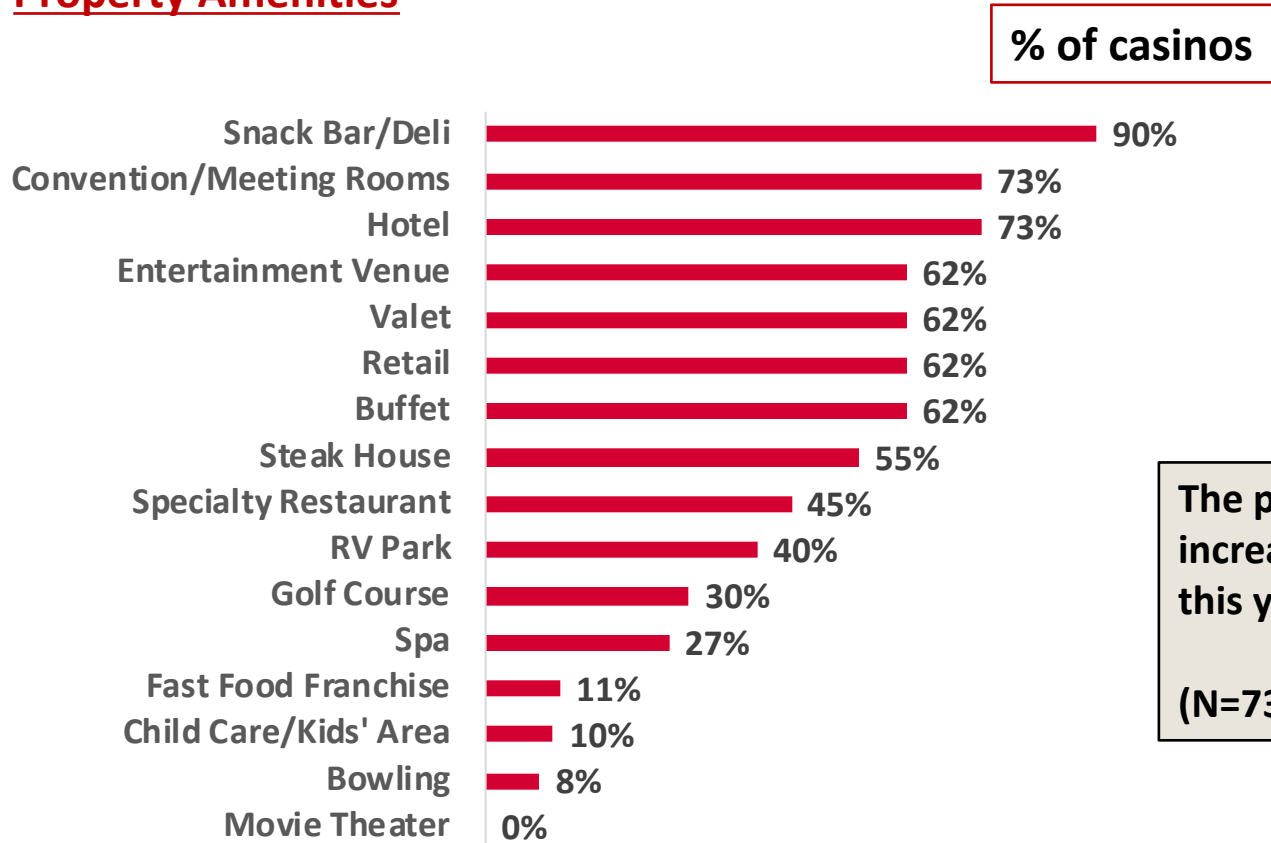


ANONYMITY:
Casinos can be segmented in analysis by size of casino as shown by the four categories shown here. Nothing will be reported that could be used to identify any specific casinos participating in the study.

(N=82)

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Property Amenities

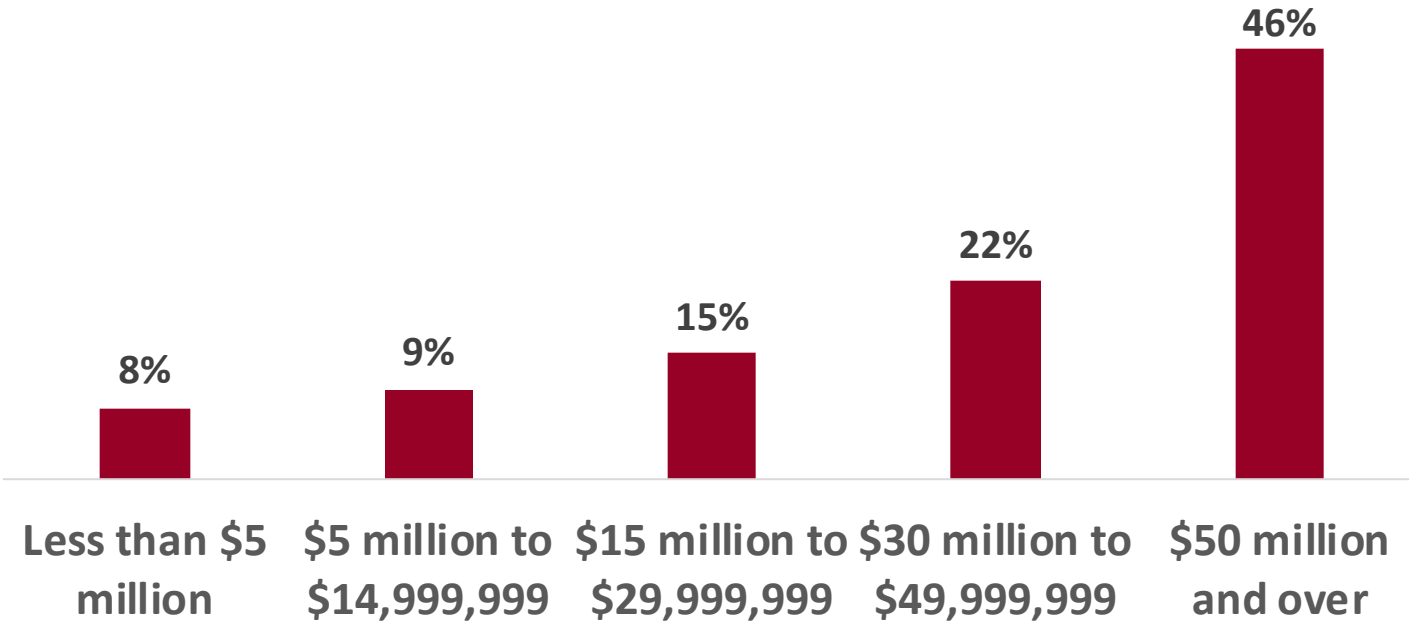


The percentage of casinos with hotels increased from 61% last year to 73% this year.

(N=73)



Total Annual Gross Revenue including Gaming and Amenities



Last year, the top revenue category was “\$30 million and over” and included 65% of all casinos. This year the top category is “\$50 million and over” and still includes almost half of all Tribal casinos. This question is optional to answer since some casinos do not wish to reveal this information even in an anonymous survey.

(N= 54)



Competitive Threat of Other Casinos in Your Market



Very Competitive:

2017—52%

2018—40%

2019—44%

Somewhat Competitive:

2017—39%

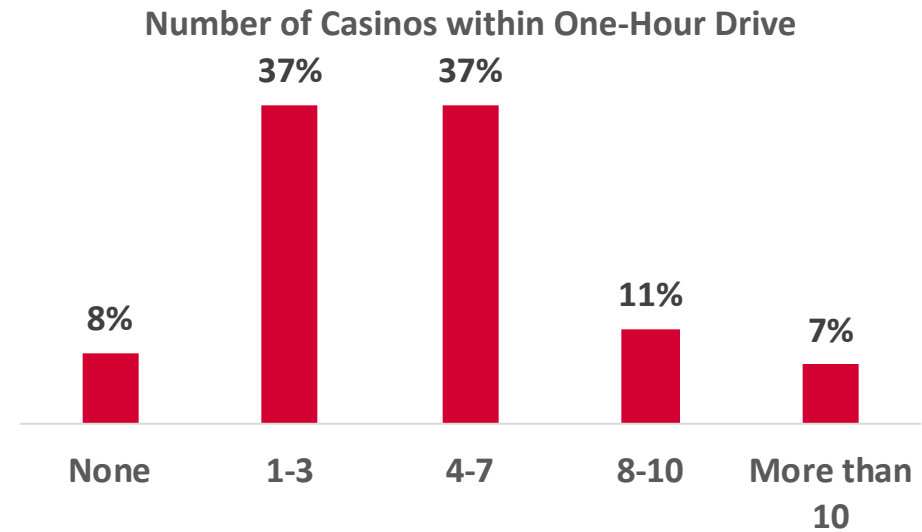
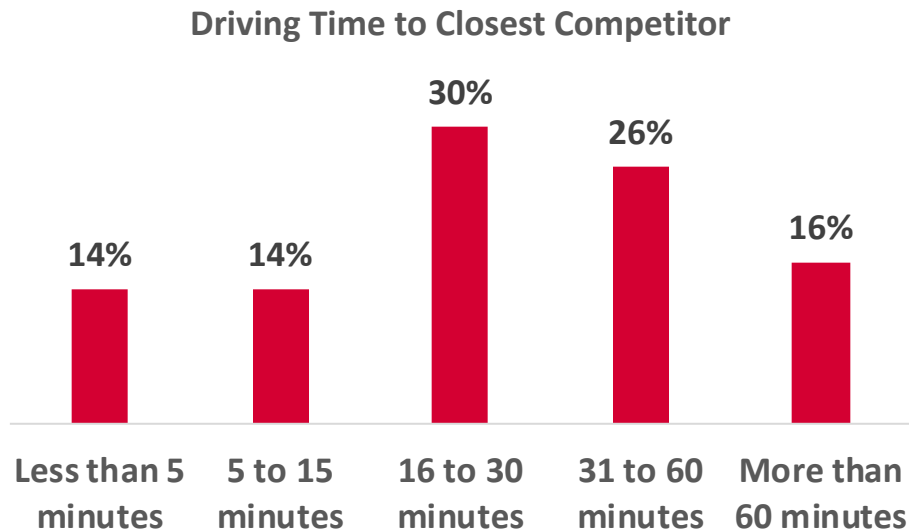
2018—40%

2019—38%

Feeling threatened by the competition? You're not alone. 82% of casinos say they are in a competitive market ("very competitive" and "somewhat competitive"), about the same as last year at 80%. Answers were computed using a five-point Likert scale ("Not at all Competitive" to "Very Competitive"). 3% said there is no competition.

(N=73)

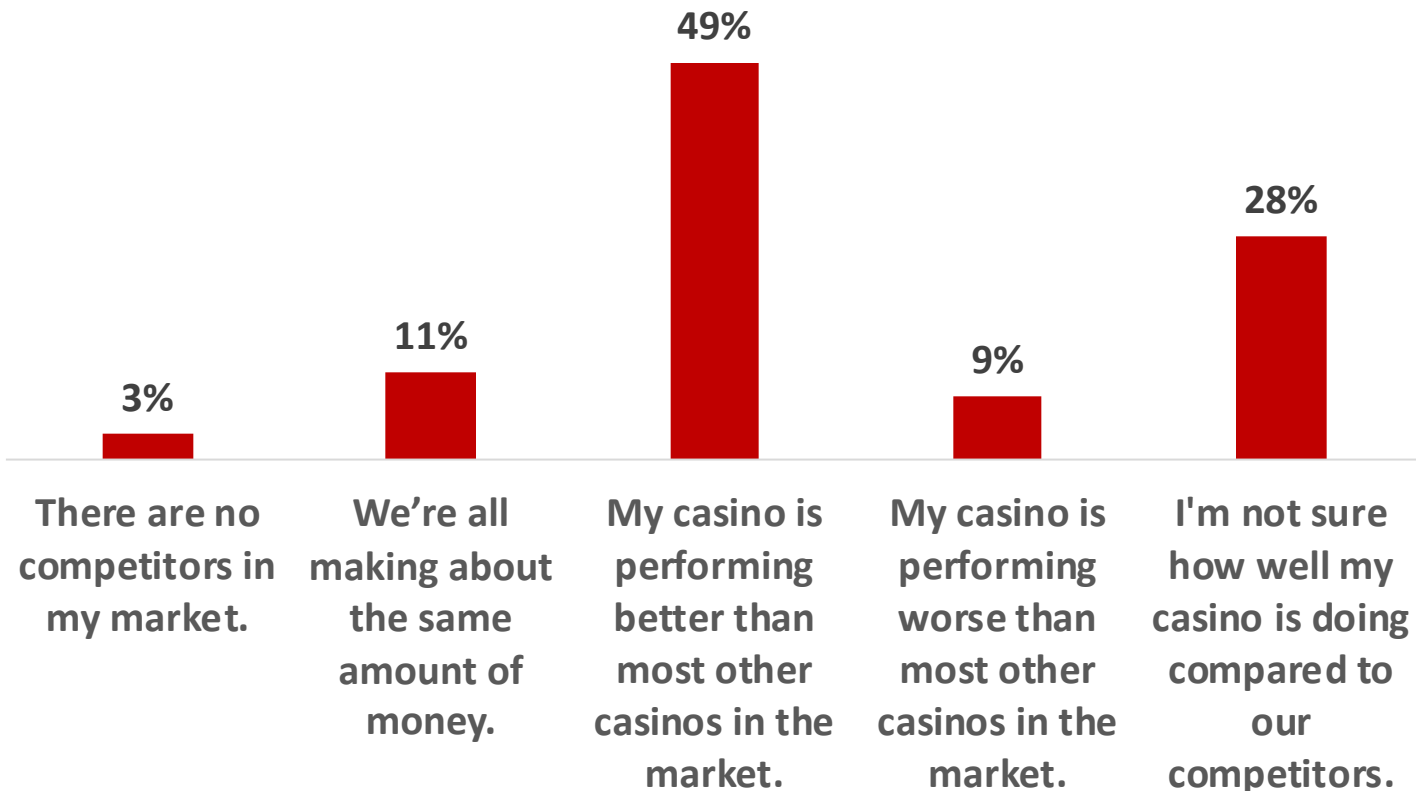
Competition Measured in Driving Time



42% of casinos report that their closest competitors are more than 30 minutes driving time from their property. 55% have at least four competitors within a one-hour drive.

(N=73)

How Your Casino is Doing Financially Compared to Competitors: Three-year Trend



Just over a quarter (28%) of Tribal casinos are not sure how well their property is doing compared to competitors.

This is the same amount as last year.

In year one, that percentage was 37%.

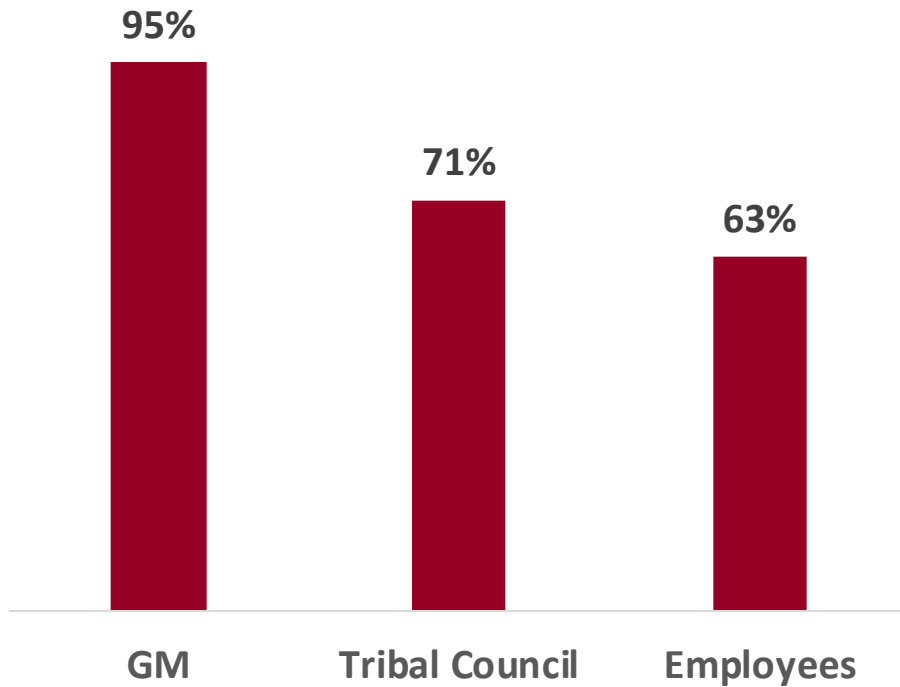
(N=73)

Philosophy of Tribal Gaming Operations



Why are Tribal casinos operating, what's their philosophy, and how do casinos differ? 29% of casinos have multiple key operation objectives. (N=73)

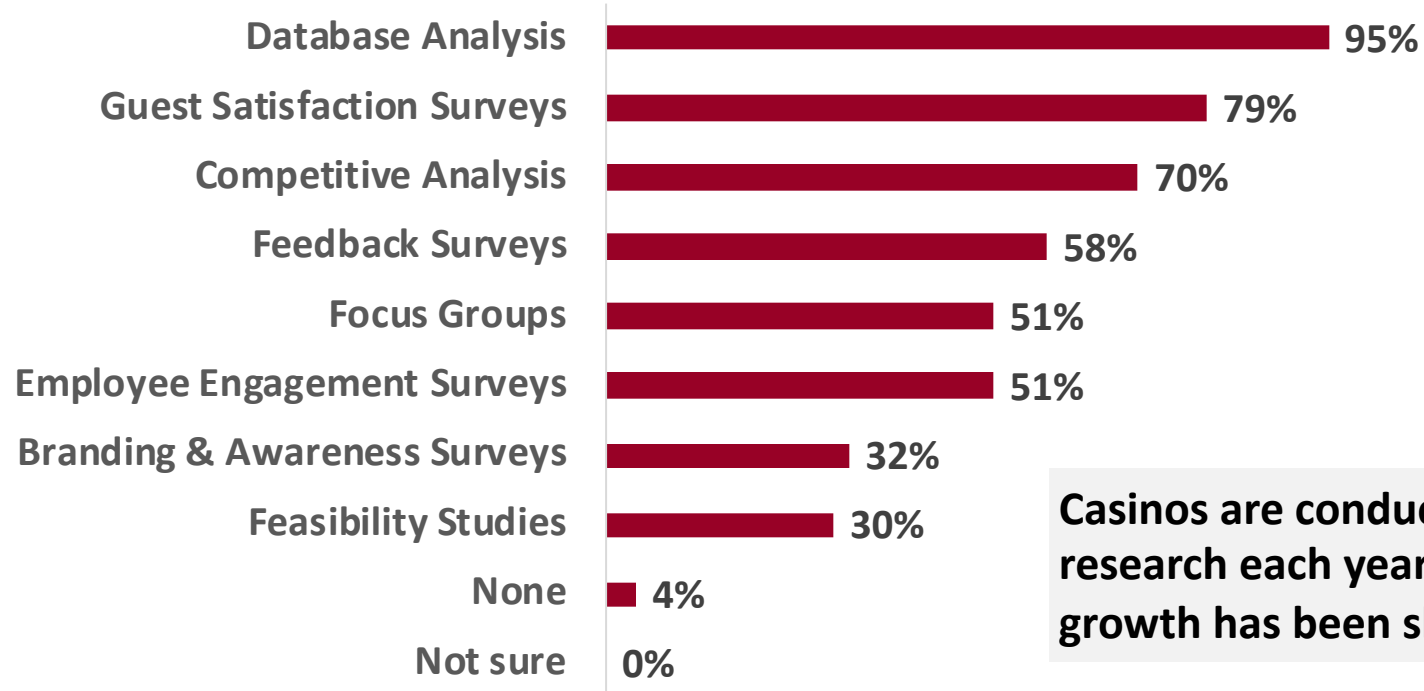
Level of Support for Marketing: Three-year Trend



For the third straight year, the highest level of support for marketing is from the GM, and the lowest is from Employees.

(N=77)

Types of Research Conducted: Three-year Trend

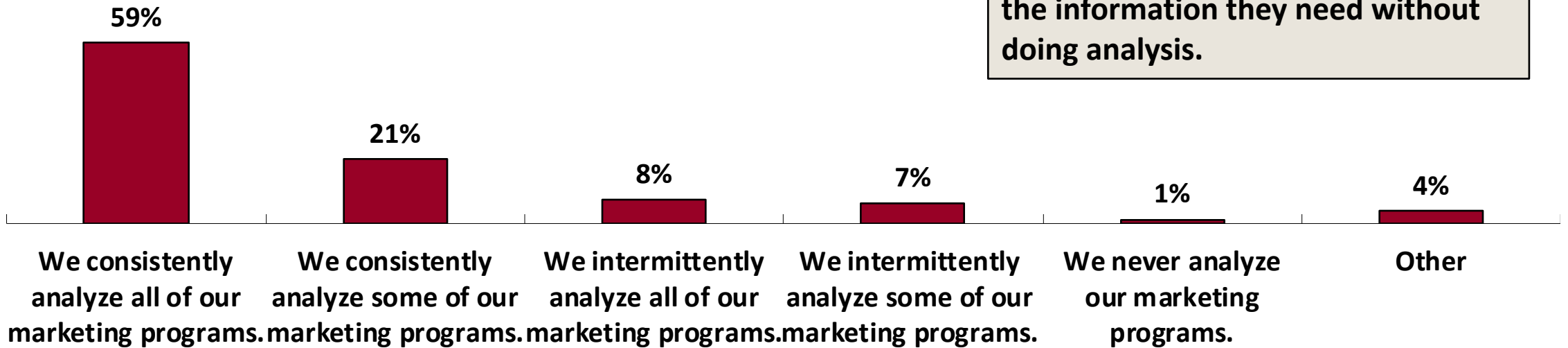


Casinos are conducting more research each year, although growth has been slow.



(N=76)

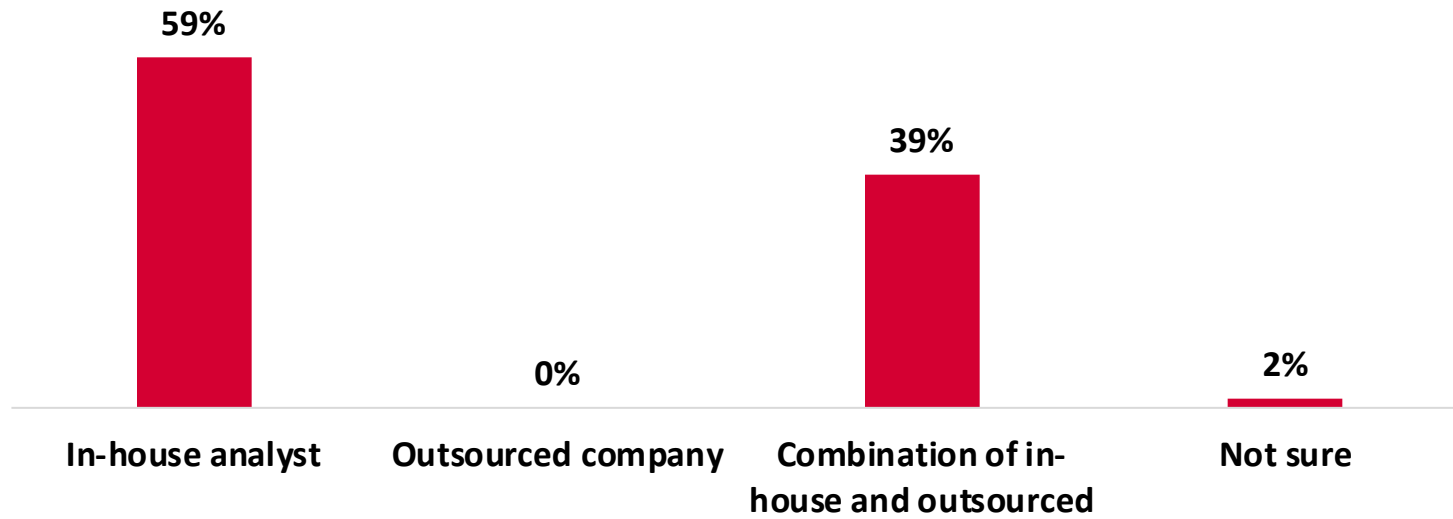
How Much Marketing Program Analysis Casinos are Doing



Respondents who said they do not consistently evaluate all marketing programs were asked why—39% said no one has the skills for analysis; 39% said no one has time for analysis; and 16% said they have all the information they need without doing analysis.

(N=76)

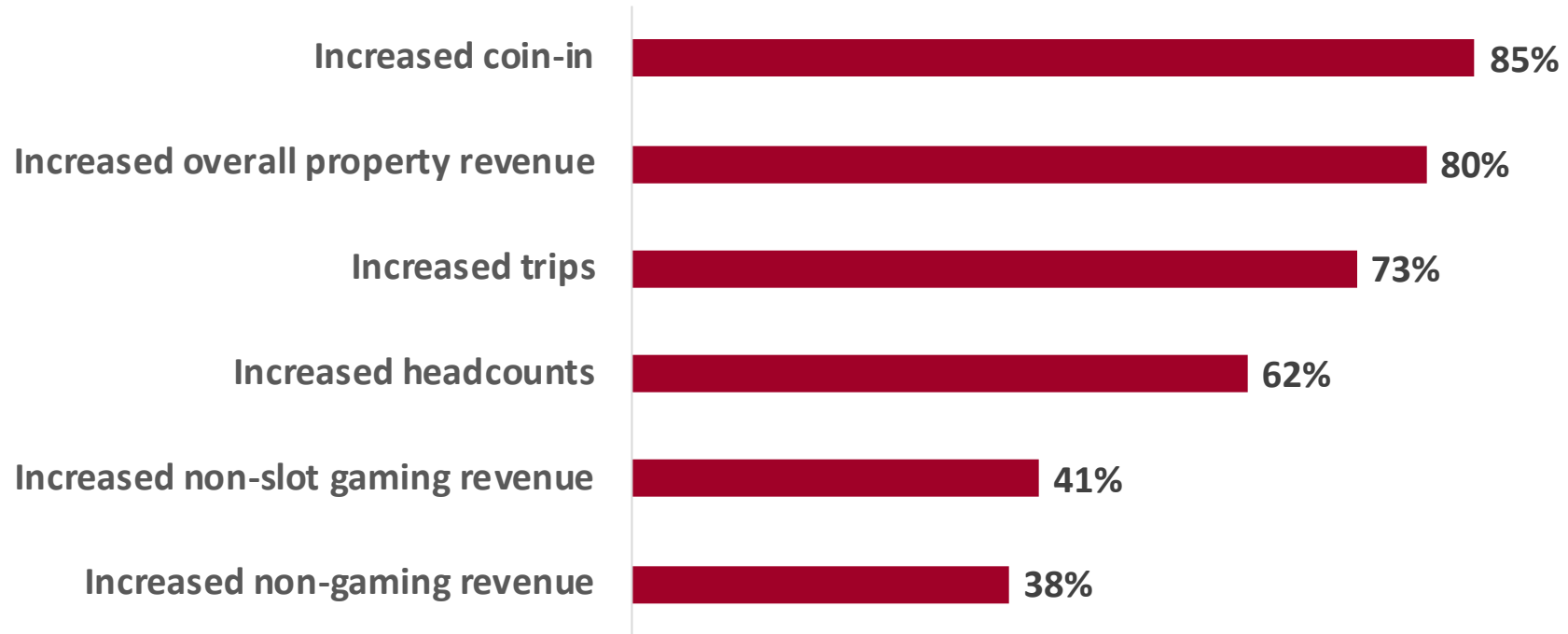
How Data is Analyzed



98% of casinos are analyzing all or part of their marketing programs in-house. (N=66)



KPIs (Key Performance Indicators) Most Often Used to Measure Success of Marketing Programs



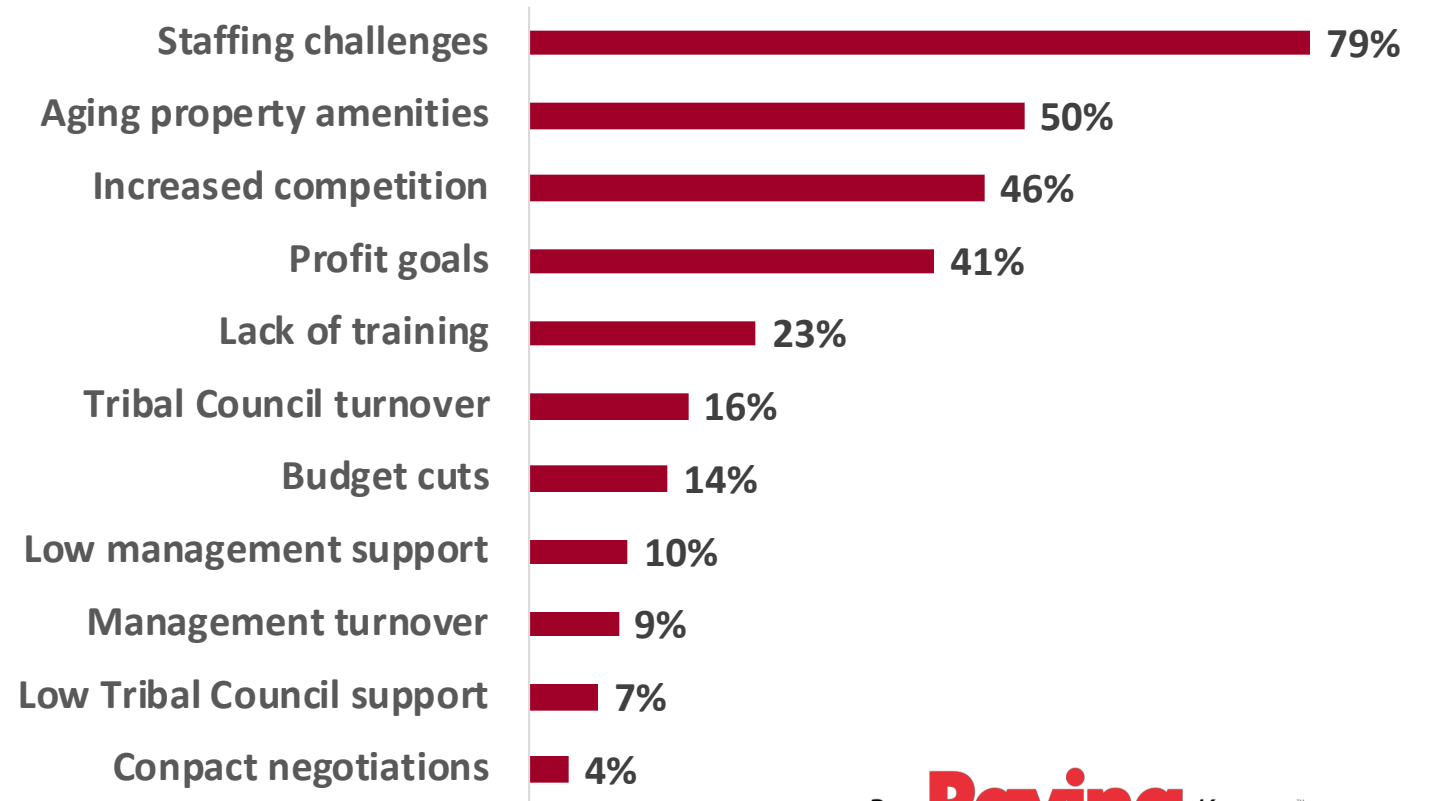
(N=66)

Biggest Challenges Casinos will Face in 2019

Last year and again this year, staffing is clearly the greatest challenge, followed by aging amenities and increased competition, so there has been no change in the greatest challenges marketers are facing in 2019.



(N=70)

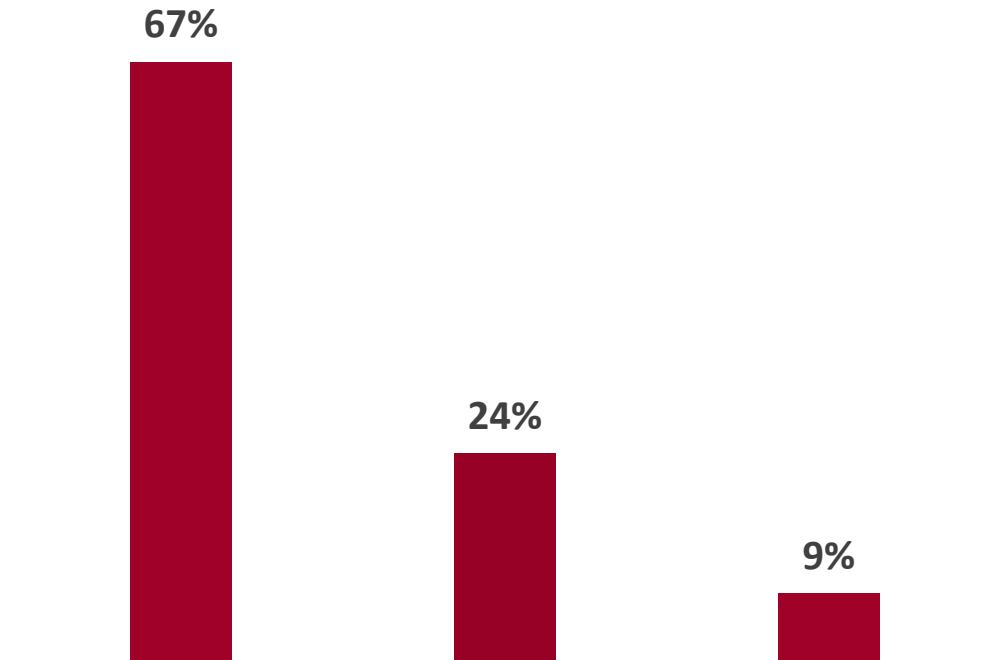


Percent of Casinos Planning Capital Projects in 2019



Last year CapEx projects were predominately hotels.

This year a little bit of everything is being planned.



Yes

No

Not sure

(N=70)

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Players Clubs

The next few pages show key statistics for casino players clubs. In customer research that Raving conducts, players club benefits are consistently ranked as very important by customers and are a key visit motivator. Knowing how your club is perceived by customers can be a competitive advantage. Do your customers think that all players clubs are about the same or are you leveraging your investment to differentiate your club?

Most casinos are probably monitoring competitors' clubs but there is some information that you can't easily get. That's what this section is designed to do—show some data ranges to help you gain a better perspective of where your casino falls on the spectrum.

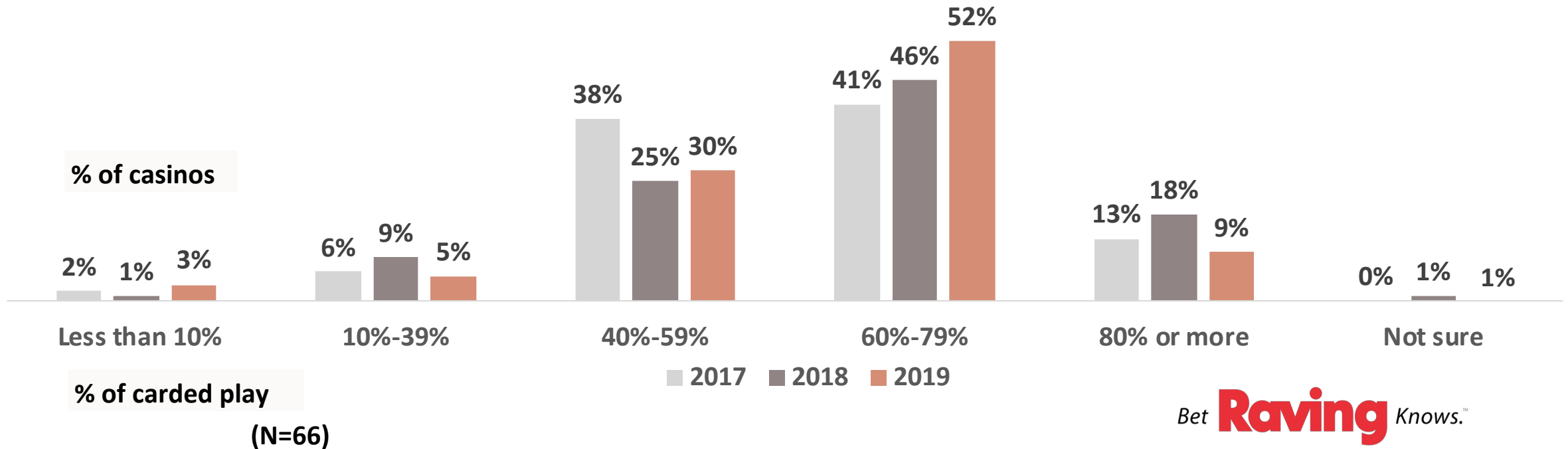
Knowing how other casinos are performing in areas such as percent of tracked play, reinvestment ratios, and new member signups, can help you gauge the efforts of your club.



Percent of Carded Play: Three-year Trend

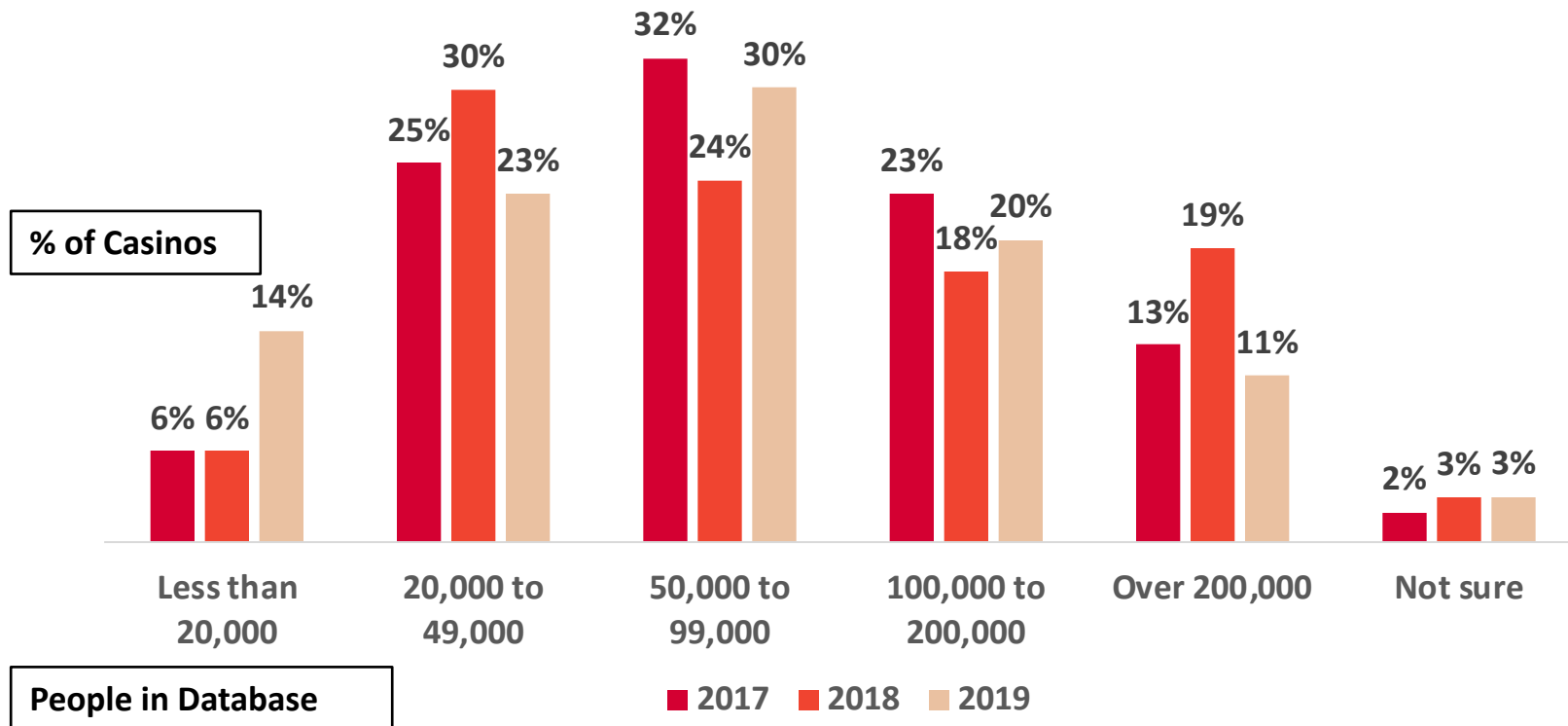
There was some decline in the percentage of casinos that have 80% and over for carded play—it fell from 18% to 9% which is a significant change. The dominant category is still casinos that have 60-79% carded play, and this actually increased a little this year from 46% to 52%.

80% of casinos have a tiered club; unchanged in the last three years.





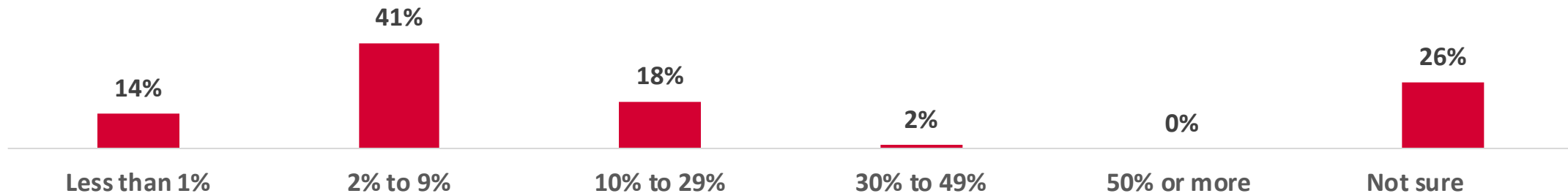
Number of People in Active Database



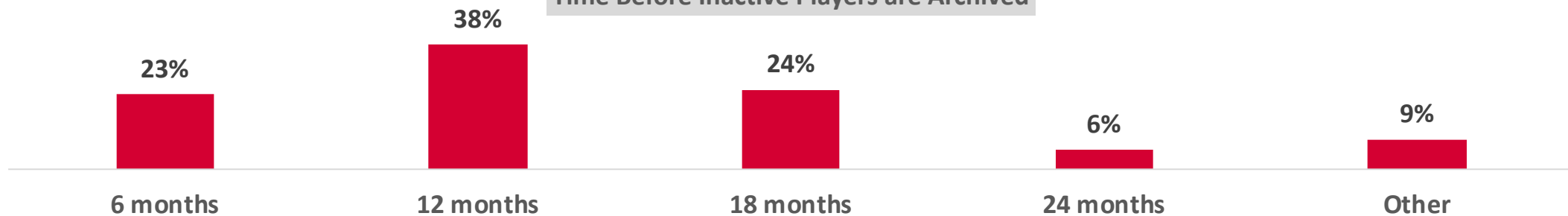
(N=66)

Players Club Stats

% of Database Placed on Inactive Each Month



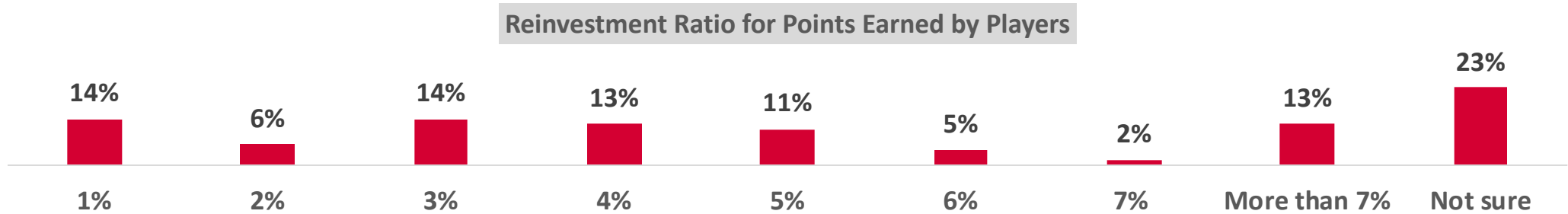
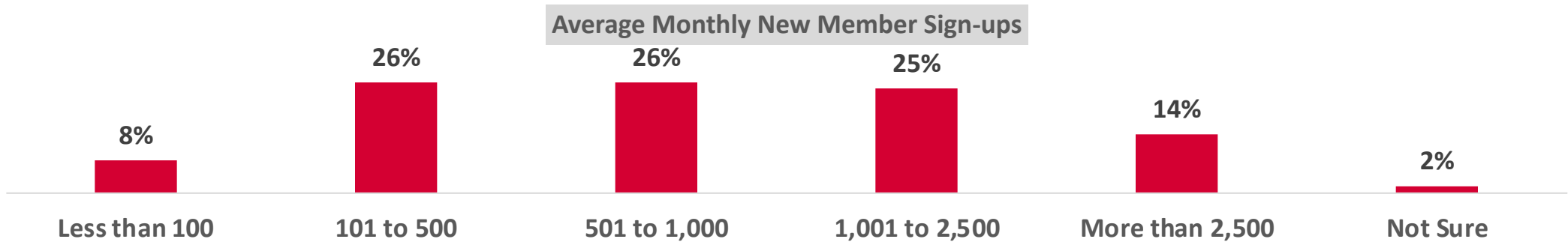
Time Before Inactive Players are Archived



(N=65)

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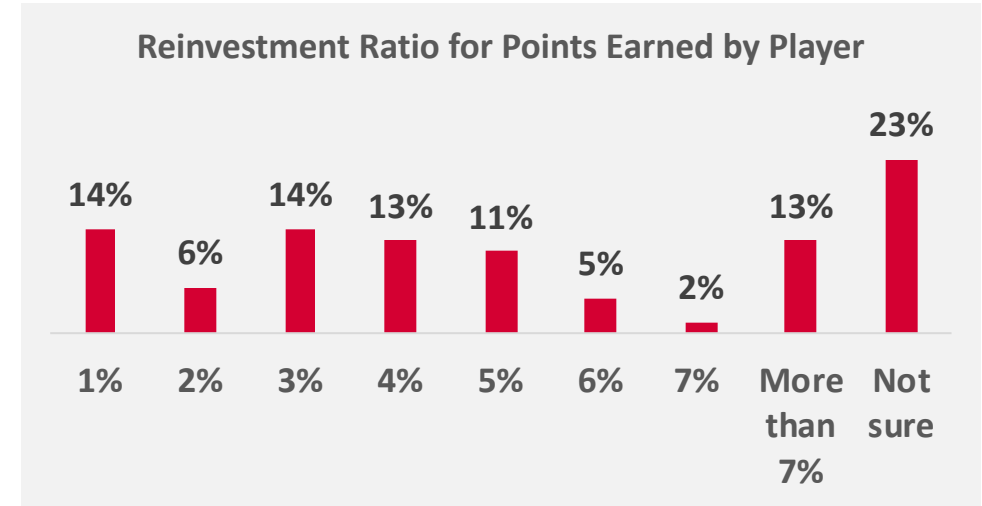
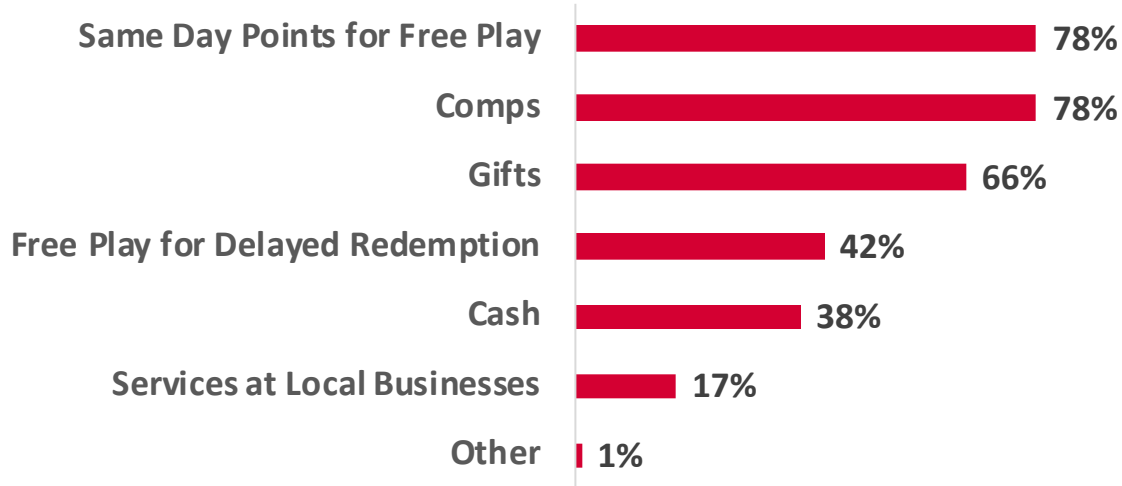
Players Club Stats



(N=64)

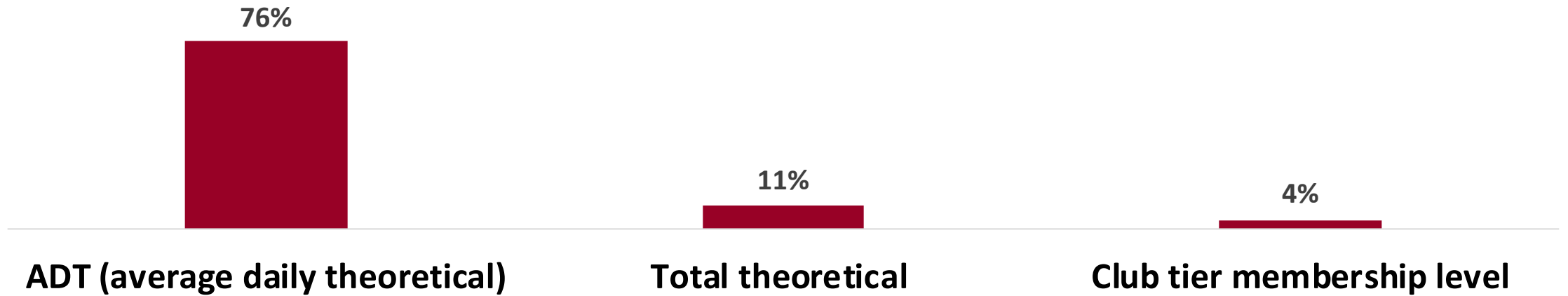
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Club Redemption Options



About one-third of casinos again this year are giving players the option of being able to cash out their points. Comping and Same Day Points for Cash are the most used club benefit. For three years, the percentage of casinos allowing players to cash out points has remained about the same. (N=65)

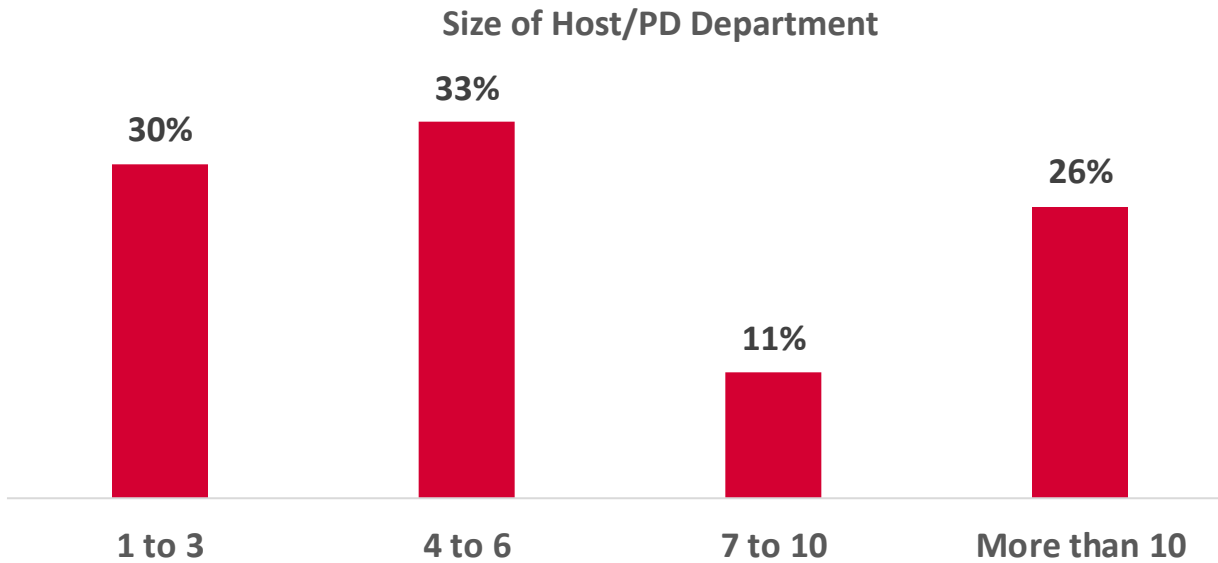
Most Important Factor Used to Determine Value of Offers to Club Members



(N=53)



Host/Player Development

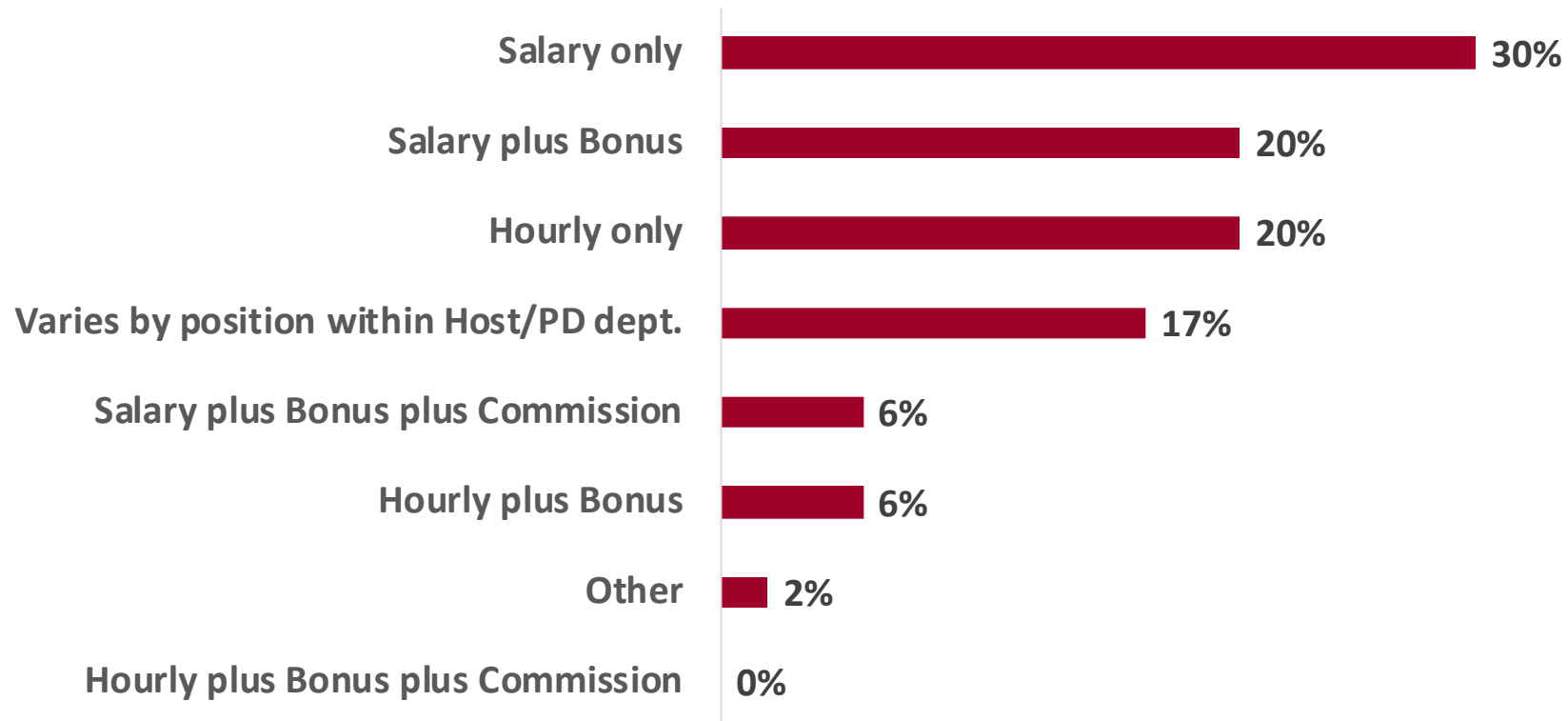


The size of the Host/PD department has not changed significantly since last year. Reporting structure is also similar to last year: 85% report to Marketing, 7% report directly to the GM, and 2% report to Gaming Operations. (N=54)



83% of casinos have a Host/PD department and this has not changed much over the last three years. It correlates with having a tiered or single level club (80% tiered).

Casino PD/Host Compensation Models



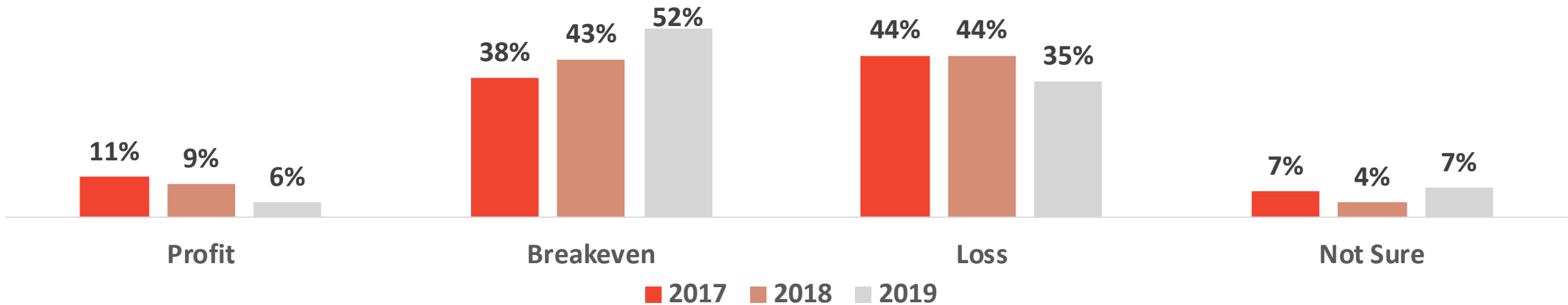
(N=54)



Entertainment Programs: Three-year Trend

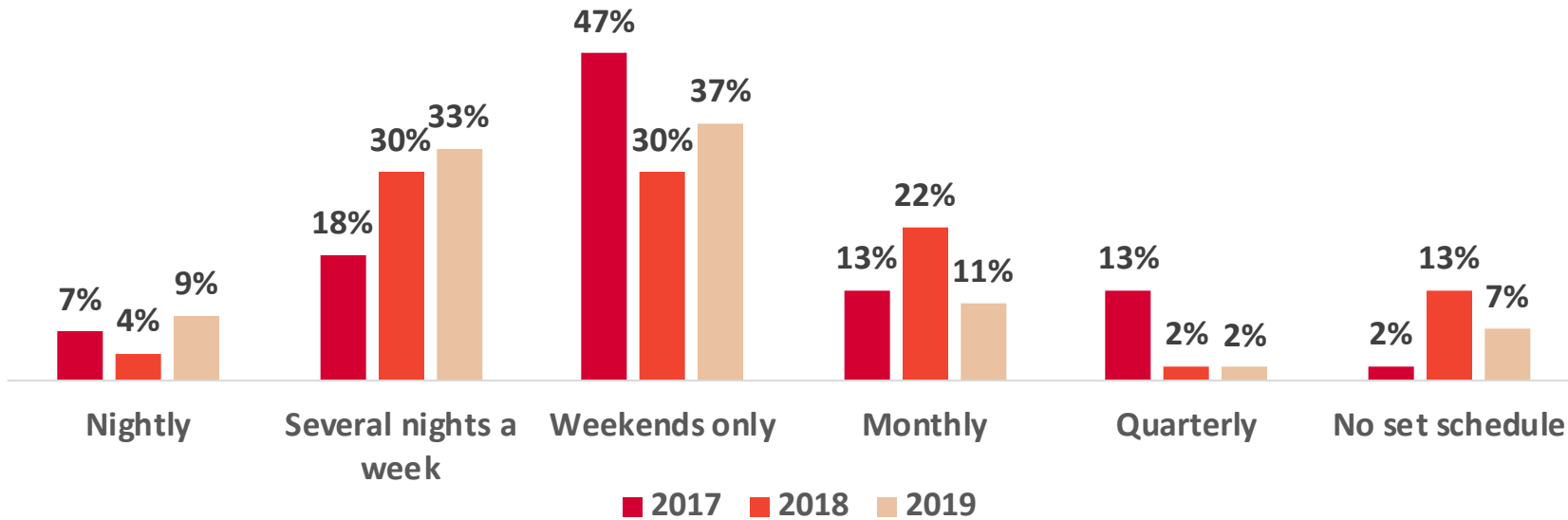


Entertainment Program Performance: Three-year Trend



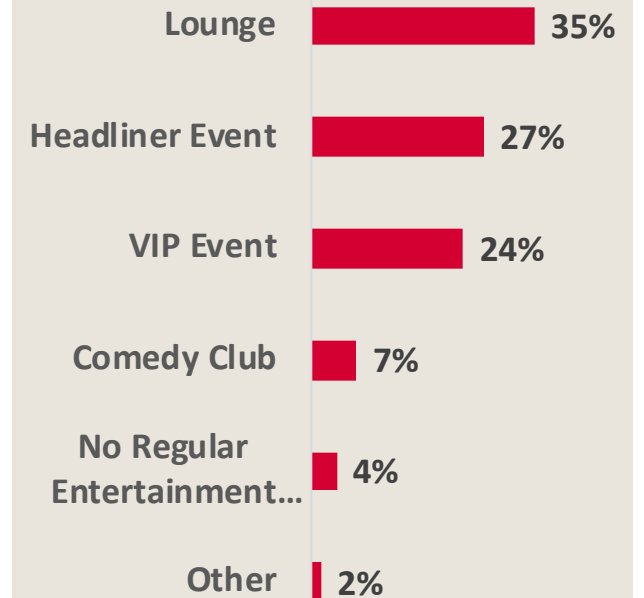
Entertainment program profitability fell from 11% to 9% to 6% in 2019. Gaming revenue generated from comp tickets was not included in the program evaluation. This chart seems to indicate that—while profitability declined—the percent of casinos that showed a loss also declined significantly from 44% the previous two years to 35% this year. Also, the percent of casinos that were able to break even on their programs increased from 43% to 52%. This could indicate that casinos are getting more savvy in operating their entertainment programs. (N=54)

Frequency of Entertainment



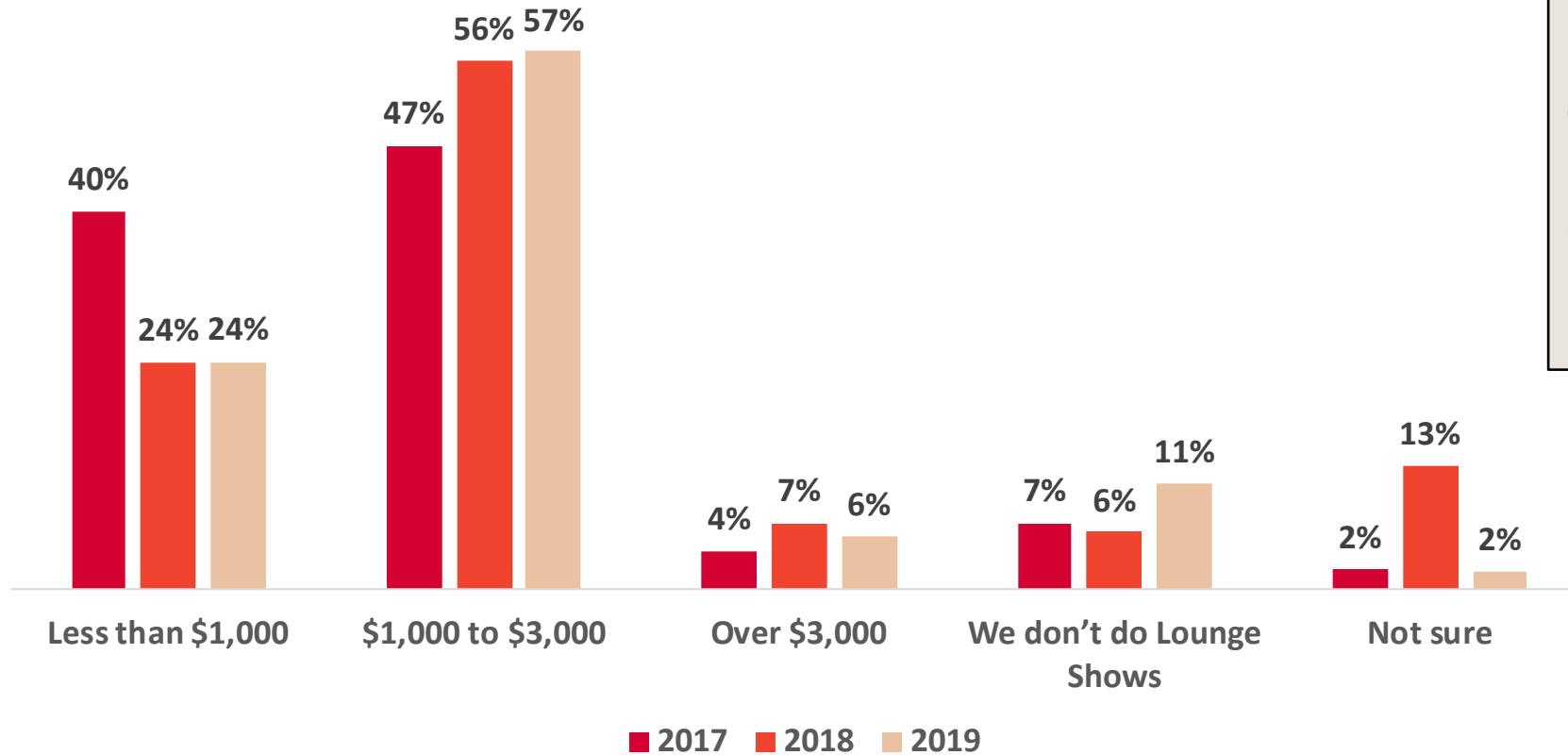
(N=65)

Types of Entertainment



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Entertainment Program Average Fees for One-night Lounge Show



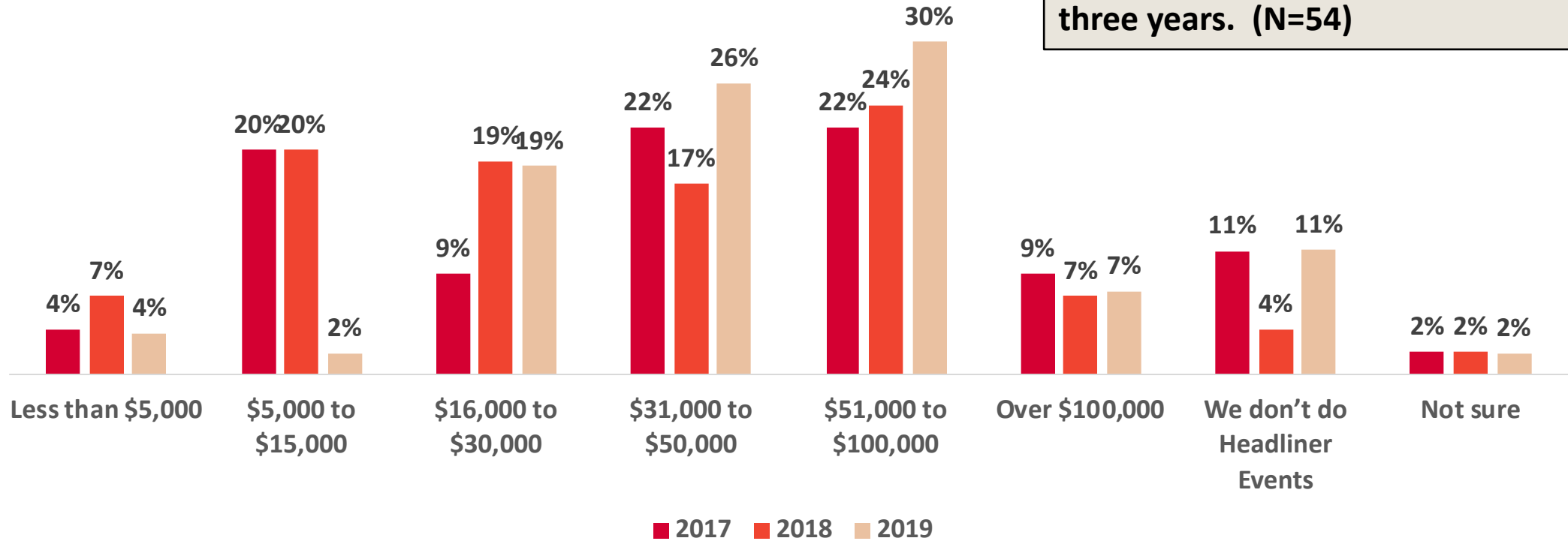
There was very little change in Lounge Show fees from last year.

More than half of casinos are paying between \$1000 to \$3000.

(N=54)

Entertainment Program Average Fees for a One-night Headliner

There was some growth in the \$31,000 and over categories but nothing of major significance. Overall, pricing for headliners has not increased much in the last three years. (N=54)



Promotions

We see this in every gaming jurisdiction—promotions bring people into the casino. You lose visits to competitors because your customers are participating in their promotions. Marketing is constantly trying to come up with new ideas or put a different twist on a promotion that was a big winner a few months ago.

What promotions are working and what has weak performance? We asked respondents these questions and the answers are presented in this section. We realize that the success or lack of success of promotions is based in large part on the details and execution.

The promotions data is designed to provide a basic range. The creativity, planning, prize amounts and publicity are all important factors that impact the success of promotions. The challenge for marketers is using limited marketing resources to generate the biggest return on investment.

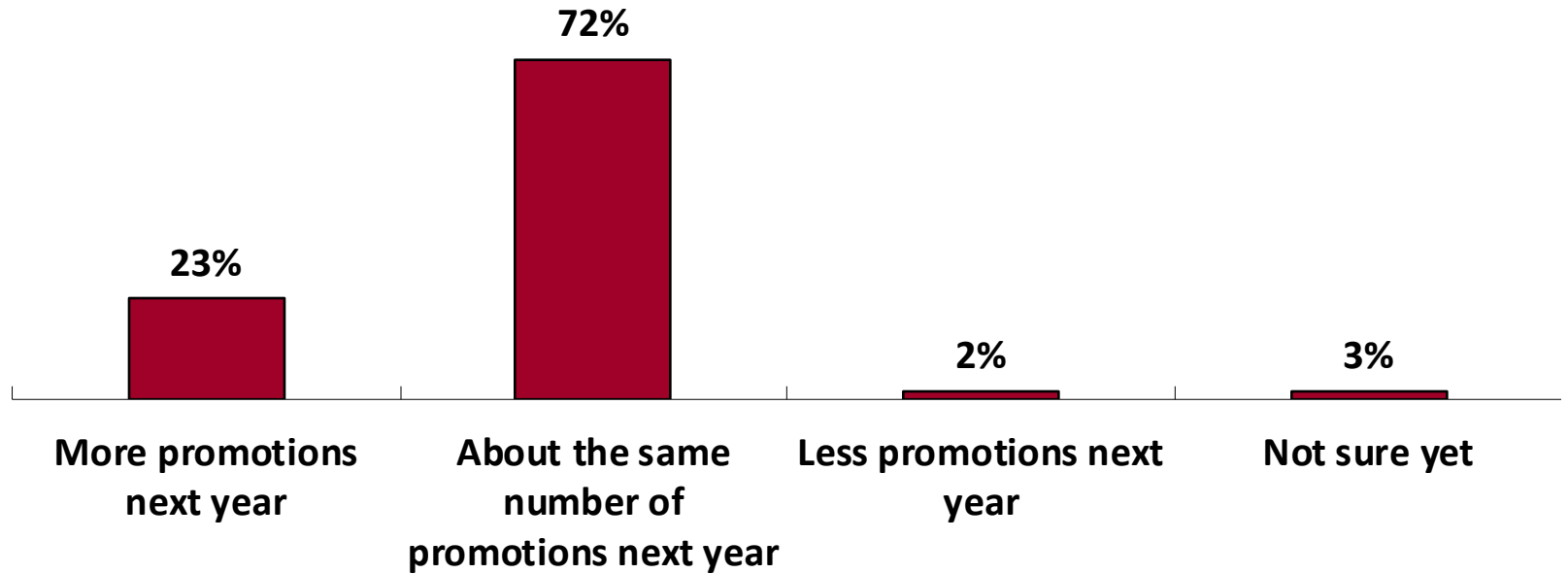
Promotions: Three-year Trend

Three years ago, 7% of casinos said they would be decreasing promotions.

Last year, 3% were going to decrease promotions.

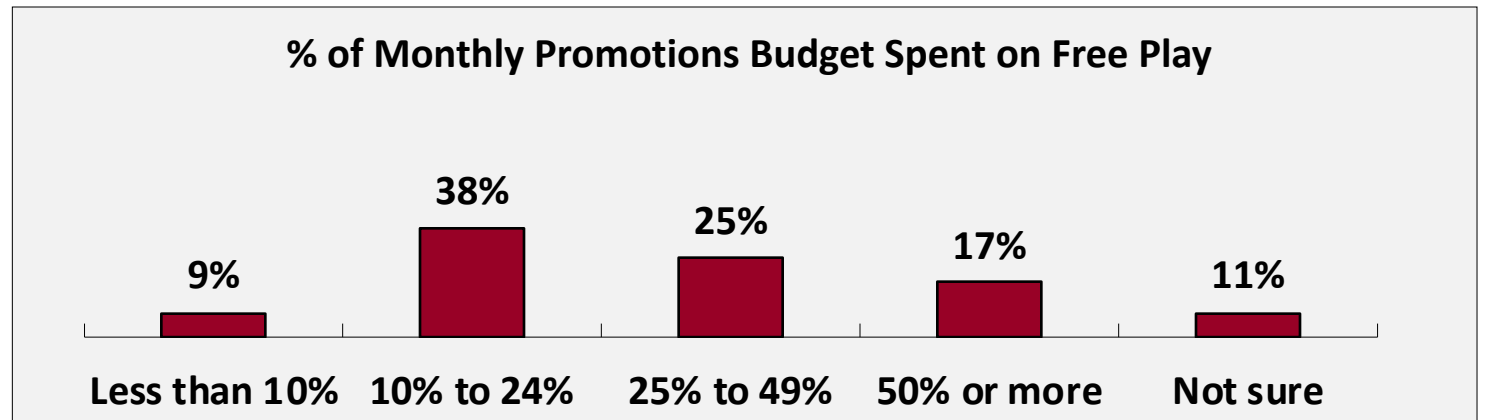
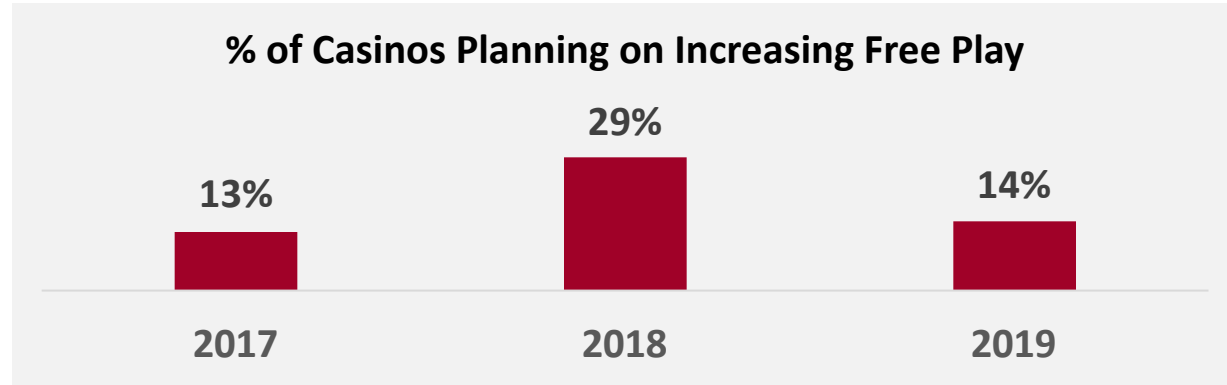
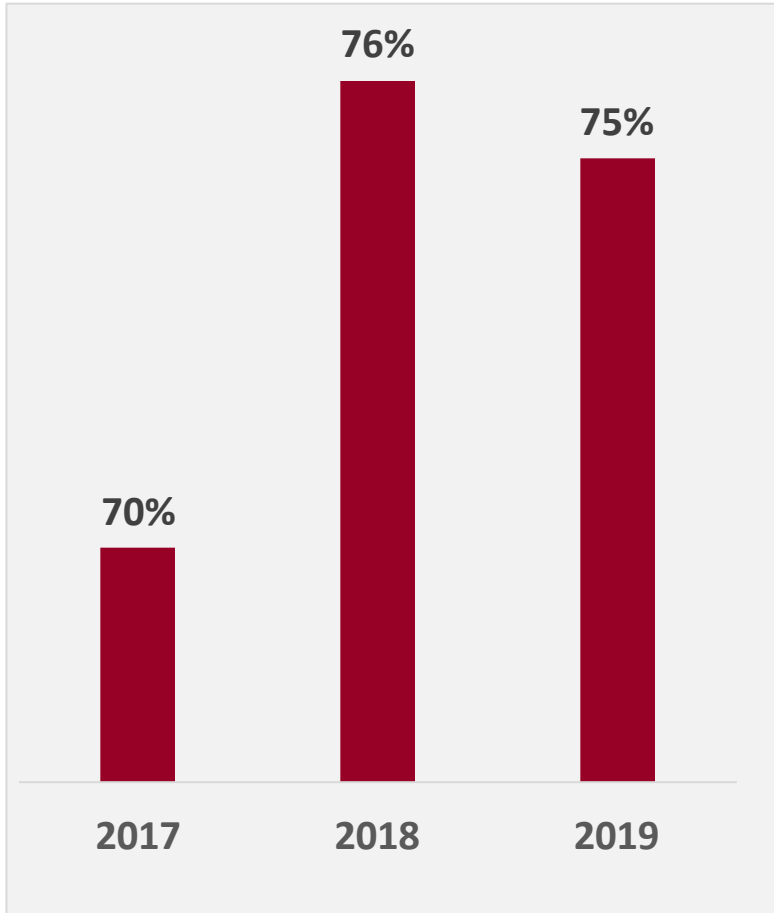
This year, 2% of casinos say they'll do fewer promotions.

If you cut back on promotions in 2019, your competitors may pick up the slack, according to this data.



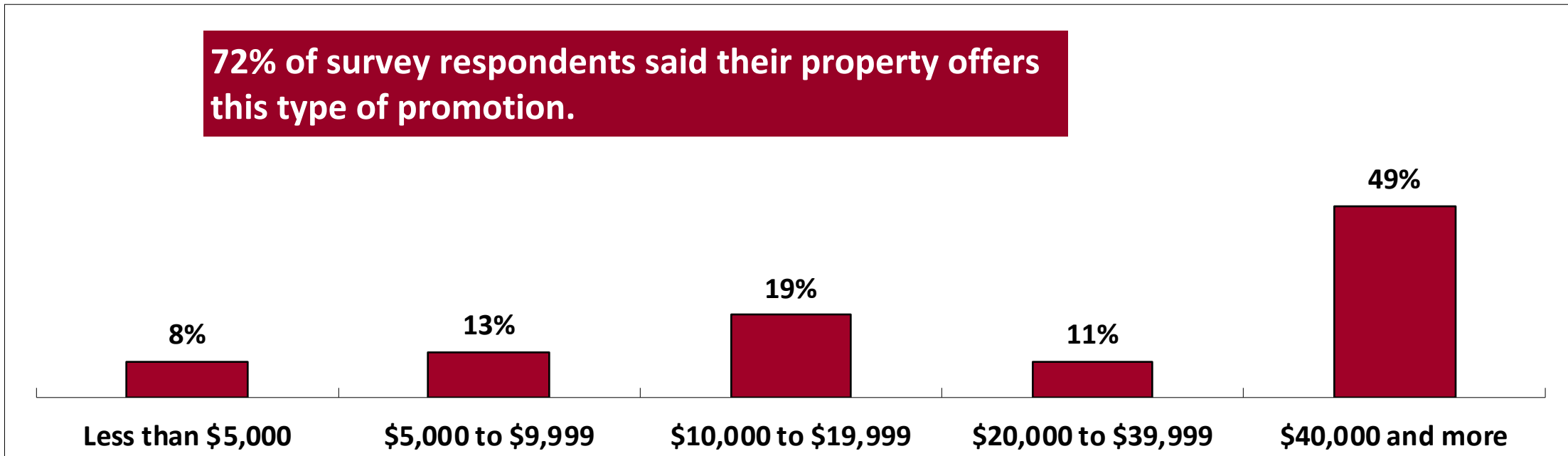
(N=65)

Free Play: Three-year Trend



This is a new question included in the 2019 survey.

Approximate Monthly Merchandise Cost for Continuity/Gift-of-the-Month Programs



(N=65)

Promotion Performance

CASH GIVEAWAY	
Huge success	45%
Fairly successful	45%
Made no difference in revenue	5%
Lost money on this promotion	0%
Didn't do this promotion	6%
Not sure	0%

CAR GIVEAWAY	
Huge success	51%
Fairly successful	35%
Made no difference in revenue	2%
Lost money on this promotion	0%
Didn't do this promotion	12%
Not sure	0%

FREE PLAY	
Huge success	40%
Fairly successful	52%
Made no difference in revenue	3%
Lost money on this promotion	0%
Didn't do this promotion	5%
Not sure	0%

SWIPE & WIN PROMOTION	
Huge success	12%
Fairly successful	46%
Made no difference in revenue	6%
Lost money on this promotion	0%
Didn't do this promotion	32%
Not sure	3%

THEMED CLUB-WIDE PROMOTION	
Huge success	14%
Fairly successful	32%
Made no difference in revenue	18%
Lost money on this promotion	2%
Didn't do this promotion	25%
Not sure	9%

POINT MULTIPLIERS	
Huge success	14%
Fairly successful	38%
Made no difference in revenue	20%
Lost money on this promotion	3%
Didn't do this promotion	23%
Not sure	2%

(N=65)

Promotion Performance

VIP EVENTS	
Huge success	45%
Fairly successful	38%
Made no difference in revenue	3%
Lost money on this promotion	3%
Didn't do this promotion	9%
Not sure	2%

ROOM OFFERS	
Huge success	25%
Fairly successful	37%
Made no difference in revenue	9%
Lost money on this promotion	2%
Didn't do this promotion	26%
Not sure	2%

MEAL OFFERS	
Huge success	12%
Fairly successful	45%
Made no difference in revenue	28%
Lost money on this promotion	2%
Didn't do this promotion	14%
Not sure	0%

SLOT TOURNAMENTS	
Huge success	12%
Fairly successful	32%
Made no difference in revenue	14%
Lost money on this promotion	6%
Didn't do this promotion	32%
Not sure	3%

TABLE GAME TOURNAMENTS	
Huge success	3%
Fairly successful	22%
Made no difference in revenue	9%
Lost money on this promotion	6%
Didn't do this promotion	55%
Not sure	5%

(N=65)

Tribal Casinos Launching New Programs

- **38% will be launching new programs this year; down from 60% last year**
- **40% will not be rolling out new programs compared to 21% last year**
- **22% are not sure, compared to 19% last year**

New programs include a mix of old and new initiatives:

- **Kiosks**
- **New member incentives**
- **Social media contests**

(N=62)



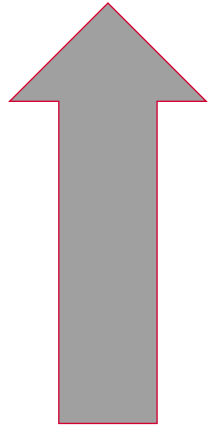
Advertising and Communication

Technology has changed the way that people communicate so casino marketers are trying to stay on top of the new channels as well as monitor what is happening with the effectiveness of traditional channels such as newspaper, TV and radio. Raving's research, as well as other studies, confirm the ongoing trend toward electronic media.

What are casino marketers going to do differently in 2019? More than half of Tribal casinos are increasing spend in electronic channels – 52% Email, 52% Social Media, and 51% Digital/Internet. More details are in this section.

44% of casinos are increasing Direct Mail this year. 77% of survey respondents said that direct mail is the most effective way to communicate with existing customers, although this is down from 88% last year.

Advertising Channel Changes in 2019



**Increases (10% and over,
percent of casinos
planning increase):**

- 52% Email**
- 52% Social Media**
- 51% Digital/Internet**
- 46% Mobile Marketing**
- 42% Website**
- 29% Direct Mail**
- 25% Texting**
- 18% TV**
- 18% Billboard**
- 15% Radio**



**Decreases (10% and over, percent of
casinos planning decrease):**

- 48% Print (Newspapers/Magazines)**
- 14% TV**
- 11% Radio**

For the past two years, TV was ranked as the most effective way to reach potential new customers. This year, TV was tied with Digital/Internet at 23%.

Direct Mail is still ranked #1 with 77% of casinos saying it is the best way to reach existing customers.

Percent of Advertising Budget Allocated to Each Messaging Category

Column figures show percent of casinos that spend in each category

% of Budget	Less than 10%	10%-19%	20%-29%	30%-39%	40%-49%	50% & over
Print	37%	35%	22%	5%	0%	2%
TV	20%	26%	31%	17%	5%	2%
Radio	6%	35%	42%	11%	3%	3%
Billboard	14%	43%	26%	6%	6%	5%
Internet	15%	37%	31%	8%	8%	2%

(N=65)

Channel Spending Plans for 2019/Percent of Casinos Shown in Columns

Print (Newspaper and Magazine)	
Decrease next year	48%
Keep same next year	46%
Increase next year	2%
Not sure	5%

Direct Mail	
Decrease next year	5%
Keep same next year	62%
Increase next year	29%
Not sure	5%

TV	
Decrease next year	14%
Keep same next year	63%
Increase next year	18%
Not sure	5%

Billboard	
Decrease next year	11%
Keep same next year	66%
Increase next year	18%
Not sure	5%

Email	
Decrease next year	6%
Keep same next year	37%
Increase next year	52%
Not sure	5%

Casino Website	
Decrease next year	5%
Keep same next year	51%
Increase next year	42%
Not sure	3%

Channel Spending Plans for 2019/Percent of Casinos Shown in Columns

Texting	
Decrease next year	8%
Keep same next year	43%
Increase next year	25%
Not sure	25%

Social Media	
Decrease next year	9%
Keep same next year	34%
Increase next year	52%
Not sure	5%

Direct Mail	
Decrease next year	5%
Keep same next year	62%
Increase next year	29%
Not sure	5%

Call Center	
Decrease next year	5%
Keep same next year	58%
Increase next year	6%
Not sure	31%

Mobile Marketing	
Decrease next year	6%
Keep same next year	31%
Increase next year	46%
Not sure	17%

Digital/Internet Marketing	
Decrease next year	6%
Keep same next year	32%
Increase next year	51%
Not sure	11%

Communication Channels Ranked as “Very Effective”—Three-year Trend

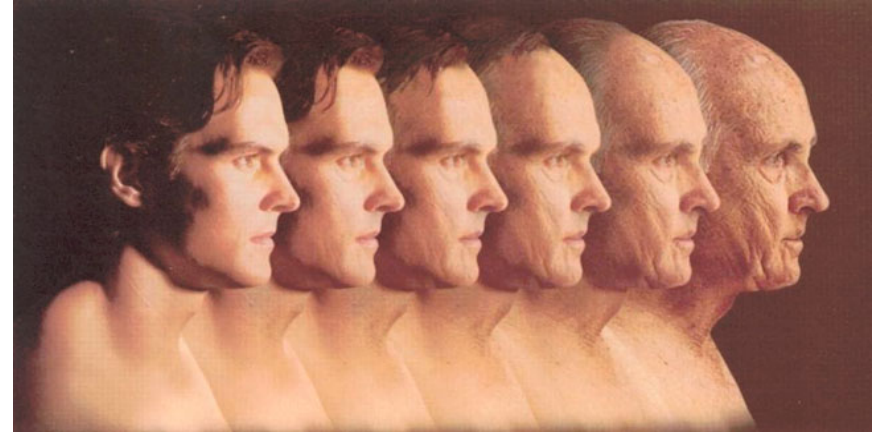
MEDIUM	2017	2018	2019	+ /-
Direct Mail	87%	85%	86%	+1%
Email	33%	43%	46%	+3%
Social Media	30%	41%	42%	+1%
Radio	13%	25%	29%	+4%
Texting	17%	25%	22%	-3%
TV	33%	25%	34%	+9%
Billboard	24%	23%	32%	+9%
Digital/Internet	11%	21%	28%	+7%
Mobile Marketing	6%	16%	25%	+9%
Call Center	15%	10%	11%	+1%
Print	9%	7%	5%	-2%

Casino marketers only decreased effectiveness of two mediums—Texting and Print and those decreases are too small to be significant percentages.

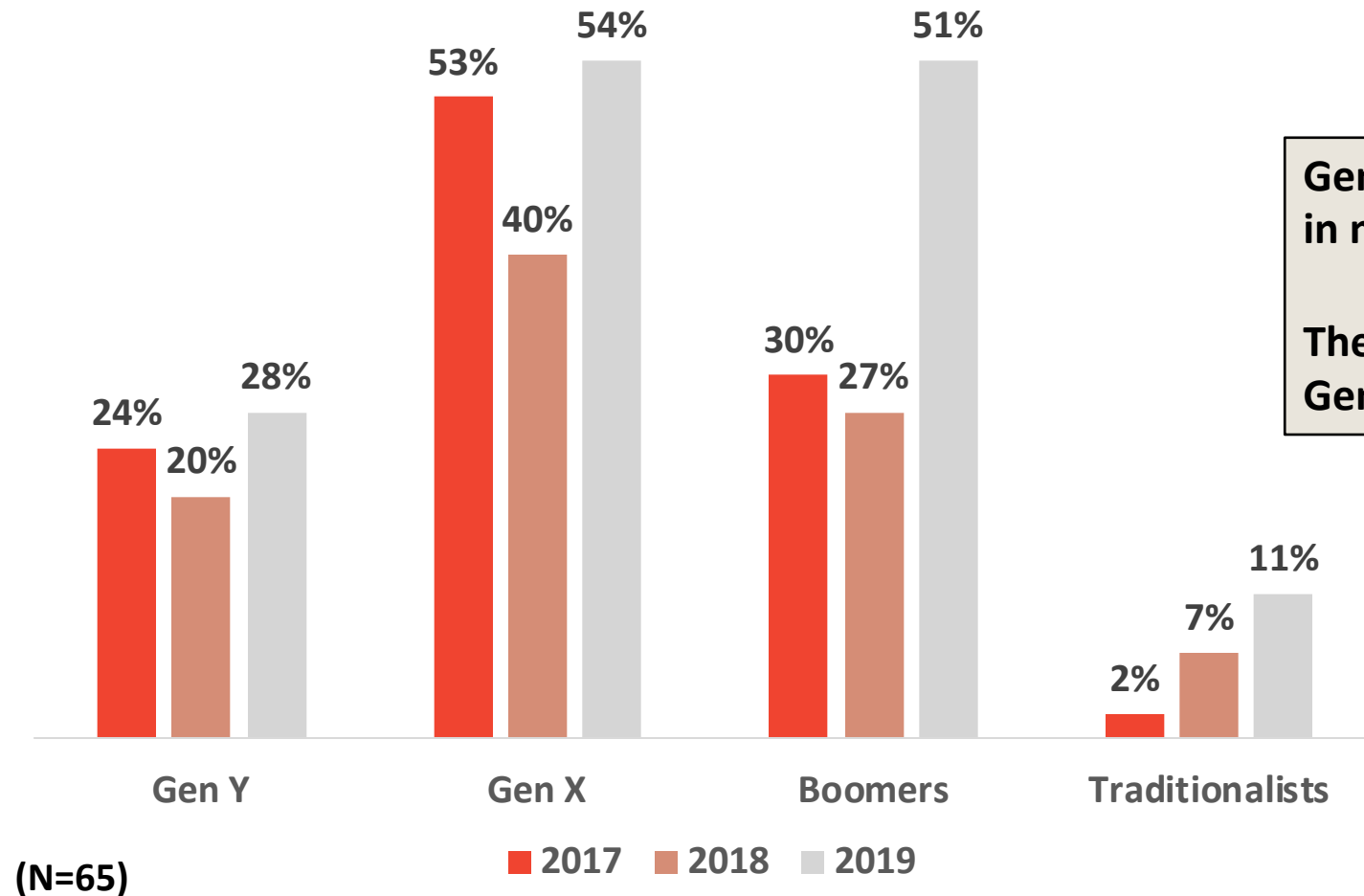
TV, Billboard and Mobile Marketing all saw 9% increases in being “very effective.”

This is the type of information that you have to look at through the lens of your unique property. If you’re in a rural market where your customers are driving further than other markets, then billboards or radio might be more important to your budget.

(N=65)



Planned Marketing Increases by Demographic Group: Three-year Trend

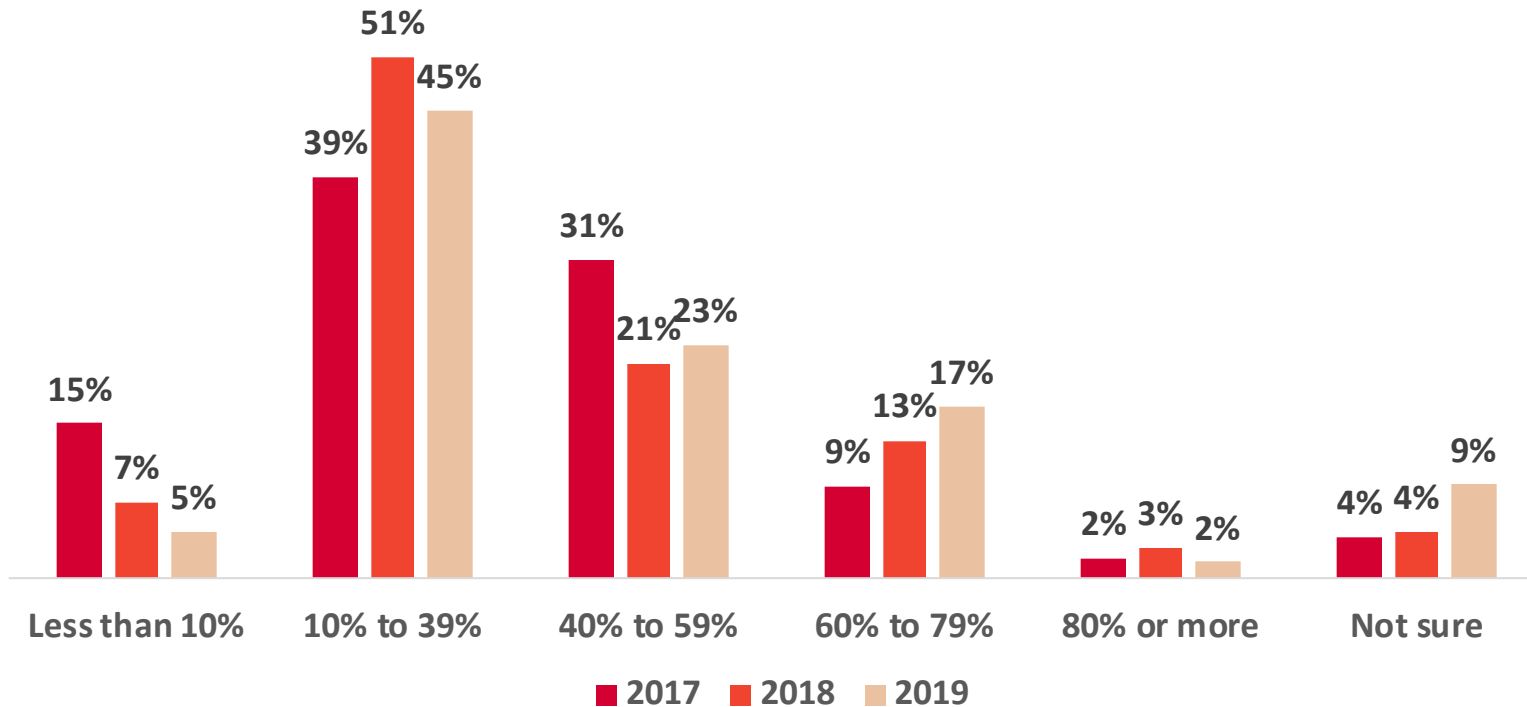


Gen Y Millennials are seeing a modest increase in marketing focus, from 20% to 28%.

The big increase is on Boomers, followed by Gen X (middle age).



Percent of Casino Database with Email Addresses: Three-year Trend



There has not been significant change since last year in the number of casinos that have increased the percentage of their database email addresses.

(N=65)



Percent of Marketing Communications Sent Using Email in 2019

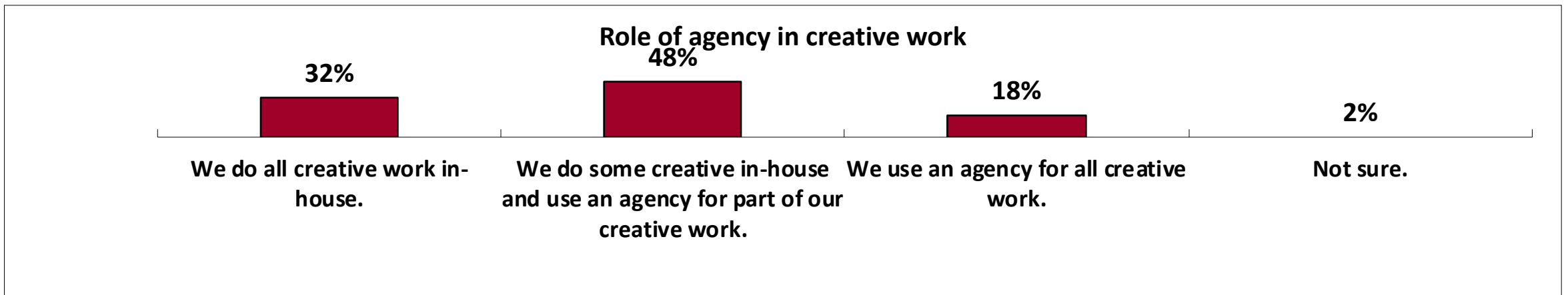
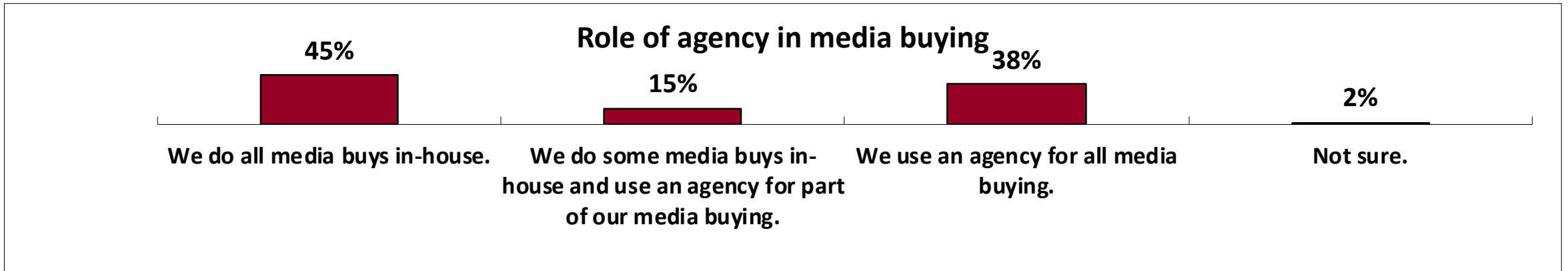
% of email messaging	2017 % of casinos	2018 % of casinos	2019 % of casinos
0%	13%	10%	9%
1%-24%	56%	55%	46%
25%-49%	19%	23%	28%
50%-74%	9%	10%	15%
75%-99%	2%	2%	2%
100%	2%	0%	0%

When comparing paper mail pieces and email messages, there has not been much significant change.

54% of casinos are sending less than 25% of total messaging via email. That includes the 9% of casinos that are not using email at all in their messaging.

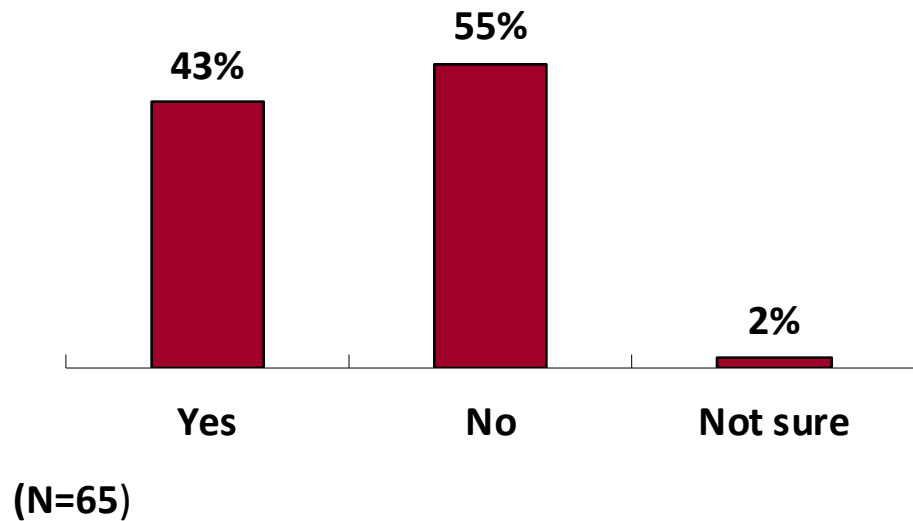
(N=65)

Role of Advertising Agencies

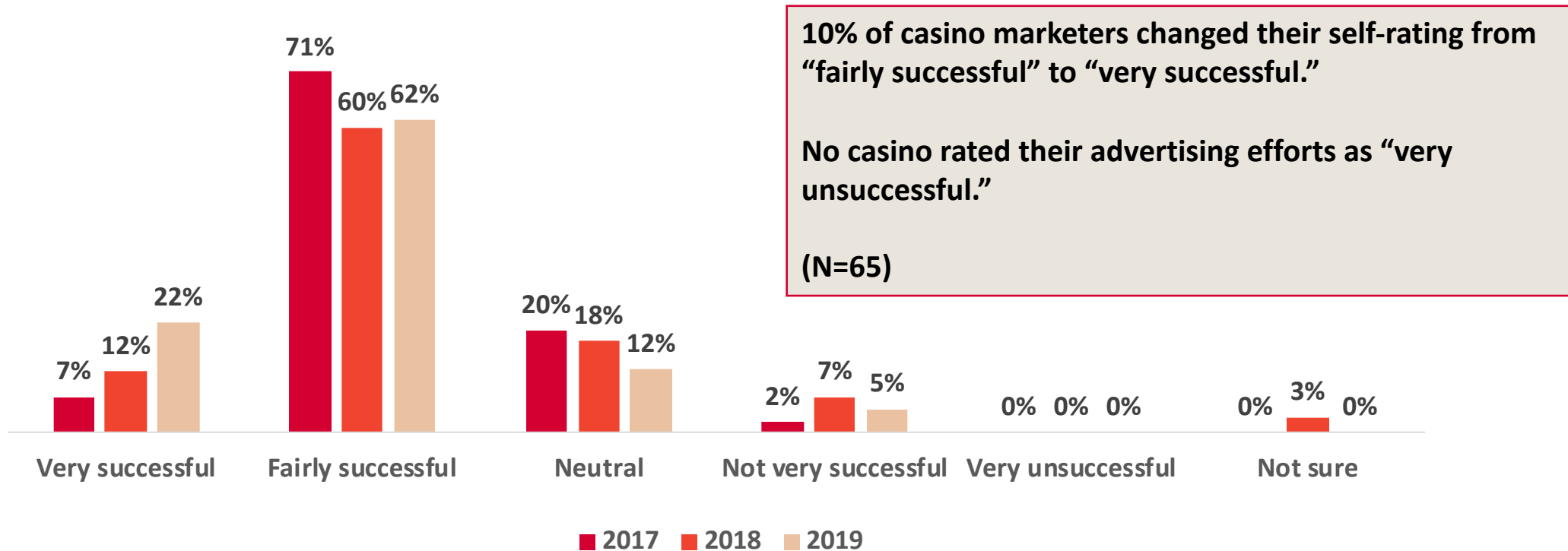


Percent of Casinos that have Developed and Launched a Phone App for Their Property

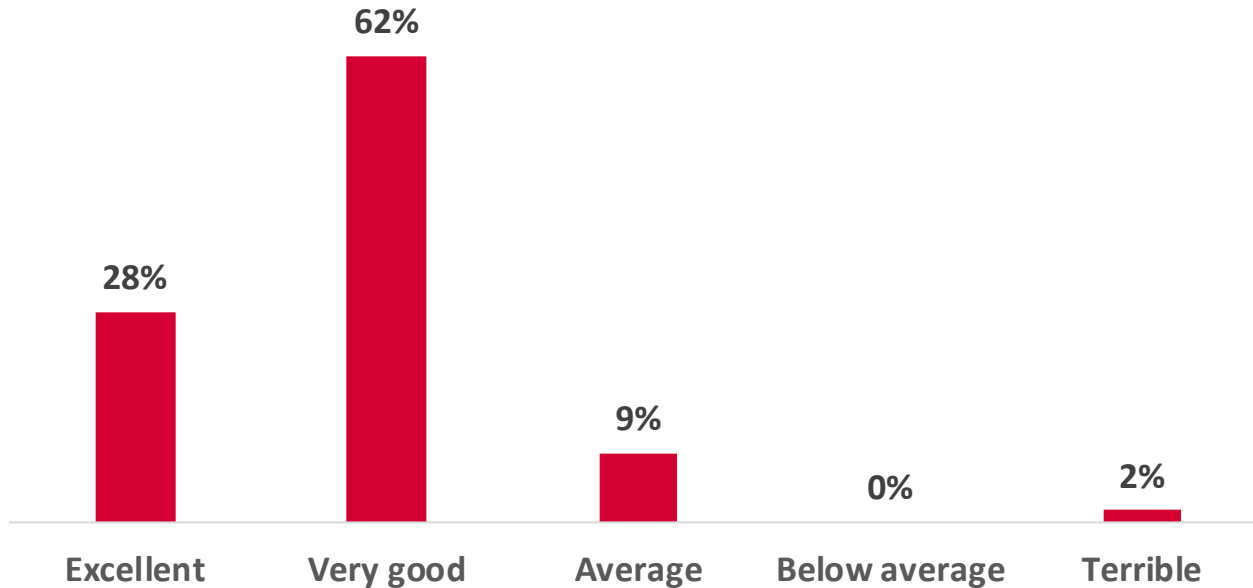
This is a new question asked this year. Raving will continue to monitor this trend annually to determine if it is a passing fad or a long-term tool for marketers.



Ranking Overall Success of Your Casino’s Advertising Program with Both Existing and New Customers



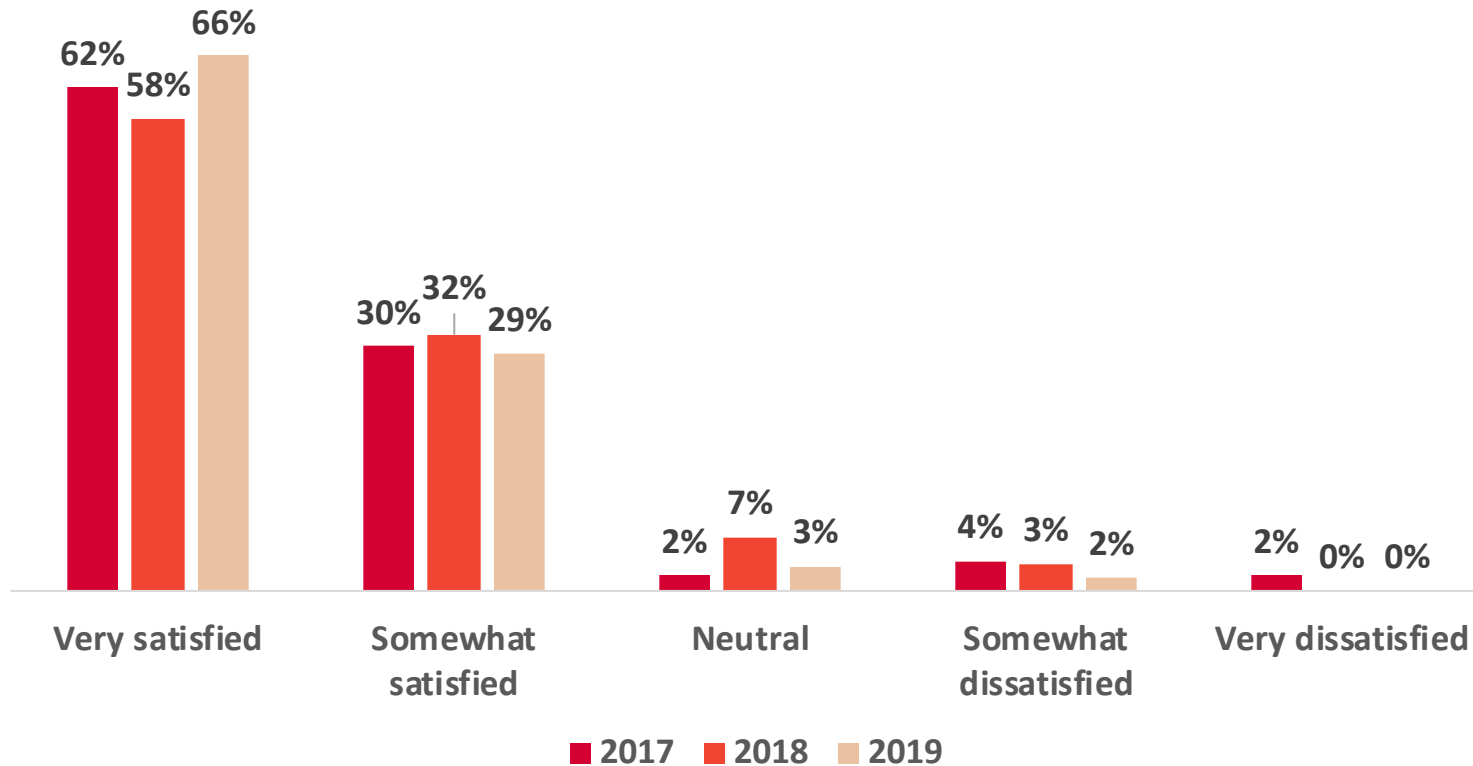
Overall Performance Ranking of Marketing Program Results by Survey Respondents



This self-rating question is designed to gauge how confident casino marketers are in their job and department performance. As shown, 78% of Tribal casino marketers rate their program performance as above average.

(N=65)

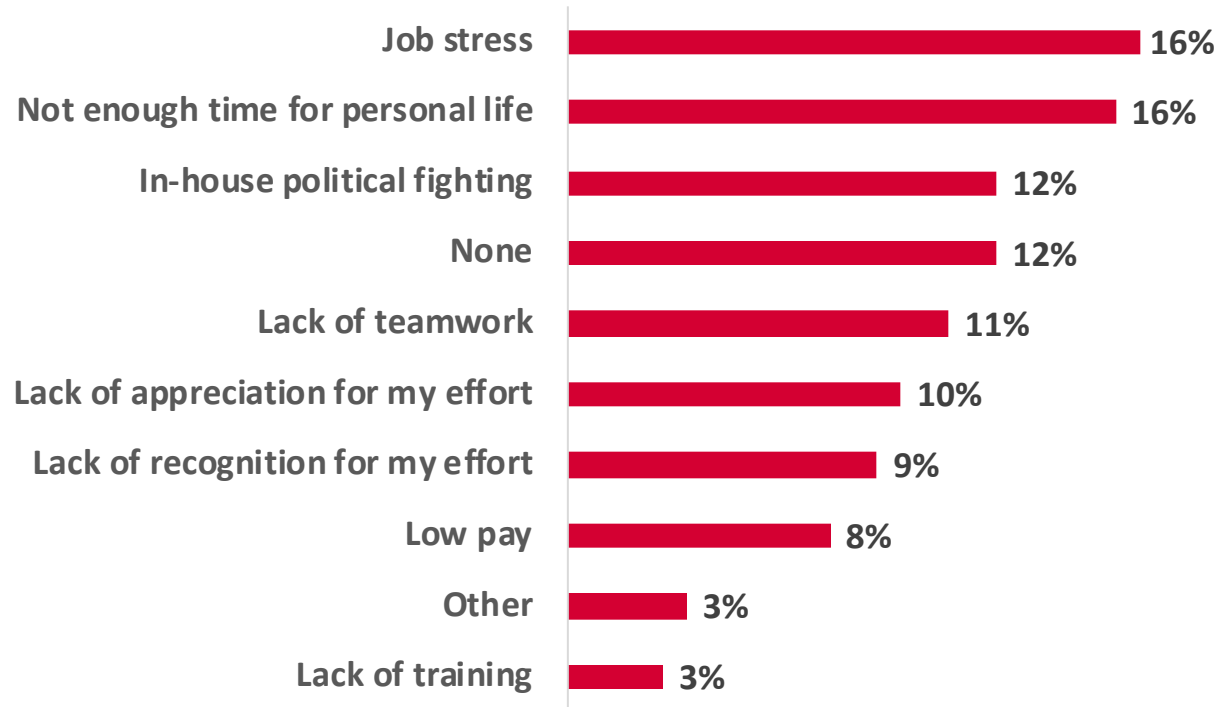
Overall Job Satisfaction



Casino marketers still have very high job satisfaction and it increased since last year. For the second consecutive year, no one reported that they were “very dissatisfied.”

(N=65)

Factors that Contribute to Job Dissatisfaction



Last year, In-house Political Fighting was the top cause of job dissatisfaction (19%) but it fell to third place this year.

12% of respondents said there is nothing in their job that causes dissatisfaction. Last year that was at 6%.

(N=65)

Factors that would Help Marketing do a Better Job



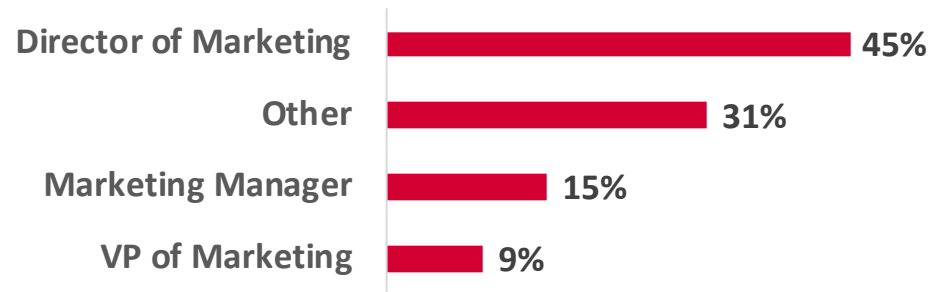
For the past two years, the top three items listed by survey respondents as being the ones that would be most beneficial were Technology, Training and Research.

This year, training dropped to fourth place and staffing moved to second place. Staffing is also the number one challenge facing marketers.

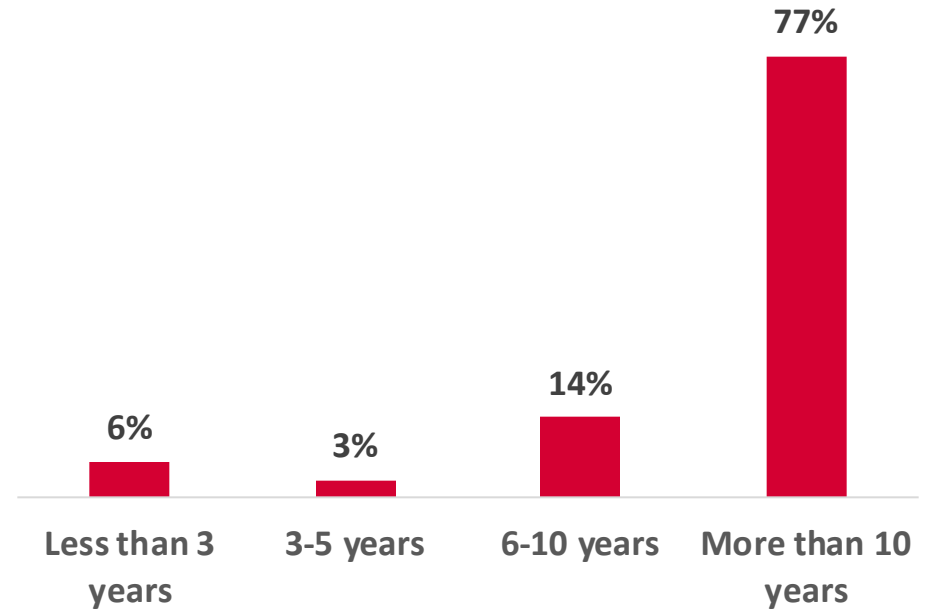
This is an indication that staffing challenges may continue to grow in importance during 2019 and should be a priority in your strategic planning. (N=65)

Profile of Survey Respondents

Job Title of Respondents



Years of Casino Experience



As shown above, the survey respondents are highly experienced casino professionals. For “other” job titles, answers included CEO, GM, CMO, COO, AGM, and others. (N=65)

Project Background

Raving's 3rd Annual Indian Gaming National Marketing Survey provides reliable, quantifiable data. It is being presented for casino management to use as a measuring tool and reference guide.

This milestone research is designed to provide a comprehensive industry overview as well as cover specific areas affecting casino marketers today. Until now, there has been no industry-wide marketing data to use as reference points. Each year, the value of this study will increase as the body of data continues to build.

The first year was the baseline study. Last year we expanded the survey content based on input from field practitioners. Raving again sought field input in refining this year's study to ensure that it is relevant and functional.

We also have three years of data to compare in identifying trends and practices that help practitioners be more successful.

Survey Objectives

While content of the study is revised and refined each year based on field input, the objectives of the survey have not changed.

The key objective of this survey is to gauge the views about the current state of casino marketing at Indian gaming properties as well as a forward view:

Assessment – Determine what casino marketers are doing and how they rate effectiveness of activities.

Challenges – Understand the challenges facing casino marketers in Indian Gaming.

Opportunities – Identify opportunities that will help casino marketers perform more effectively.

Trends – Gain insight into trends of Indian Gaming marketers.

Reliability

This study was conducted by Deb Hilgeman, Ph.D., an experienced casino marketer and research expert who has been part of Raving's team since 2006. She designed the survey and protocols for the survey to be administered online using QuestionPro survey software. Volunteers from Tribal casino marketing management were recruited to provide input on content development. Casinos operate in highly competitive environments and some of the questions ask for proprietary information. Anonymity is guaranteed for all casino participants. No information or reports will contain any information that can be used to identify any individual casino.

Reliability and Validity of Data: In large-scale consumer research, metrics such as 95% reliability and 5% margin of error are the standard. But in studies like this based on substantial proportions of small overall populations, the larger concern is validity – whether elements of the population are appropriately represented. The participating casinos here show good distribution across size, region, and services and although the sample is self-selected, it constitutes a good representation of the entire industry. There are not enough data points for inferential statistics, but the description of the industry through its summary characteristics provides a good basis for reviewing overall trends and an opportunity to compare respondents' own casinos with the competition on key measures.

Thank you!

For questions or additional information about this report, contact:

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