

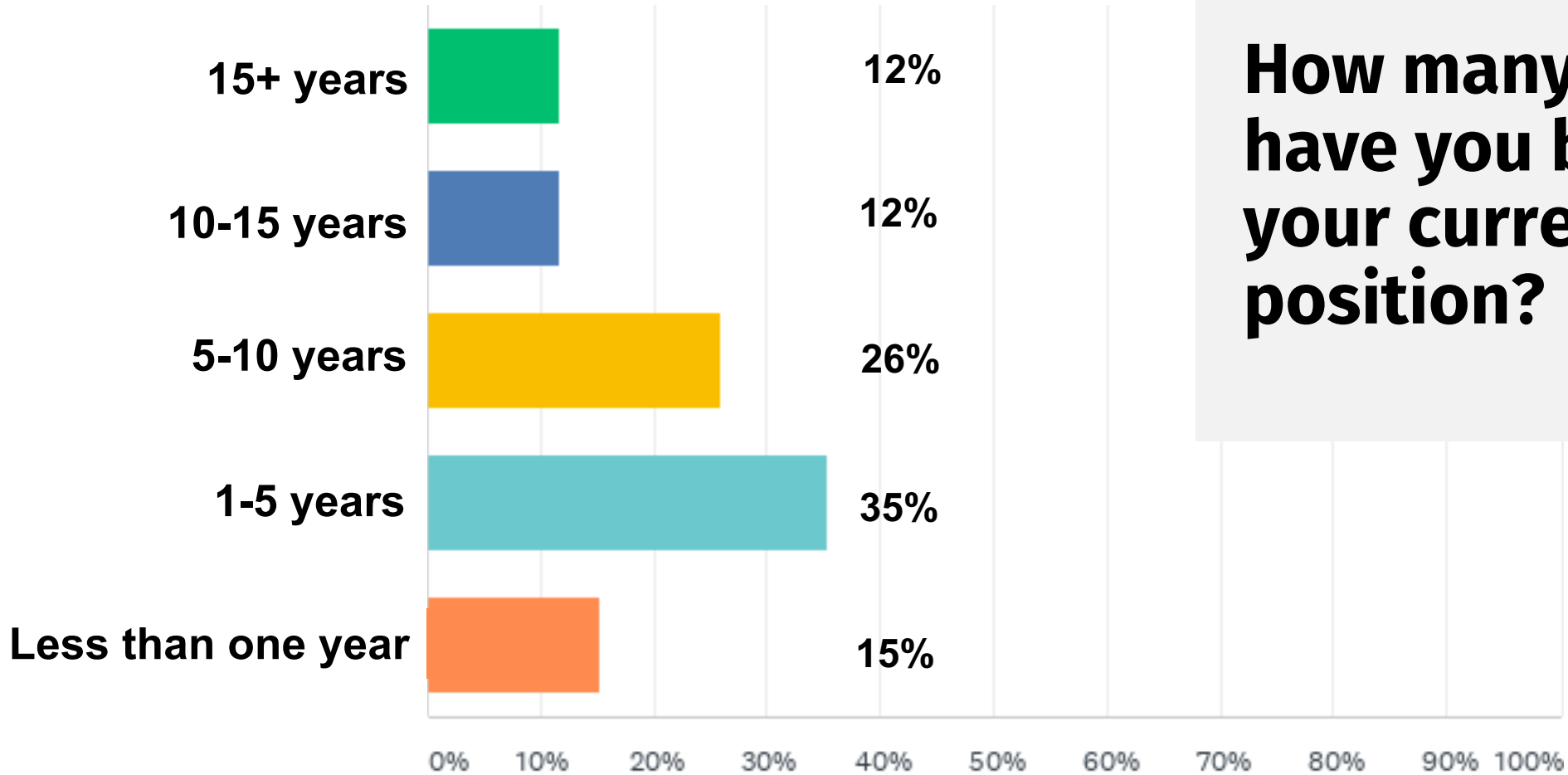
2021 Analytics & Marketing Survey



This survey was conducted between January 6 and January 15, 2021.

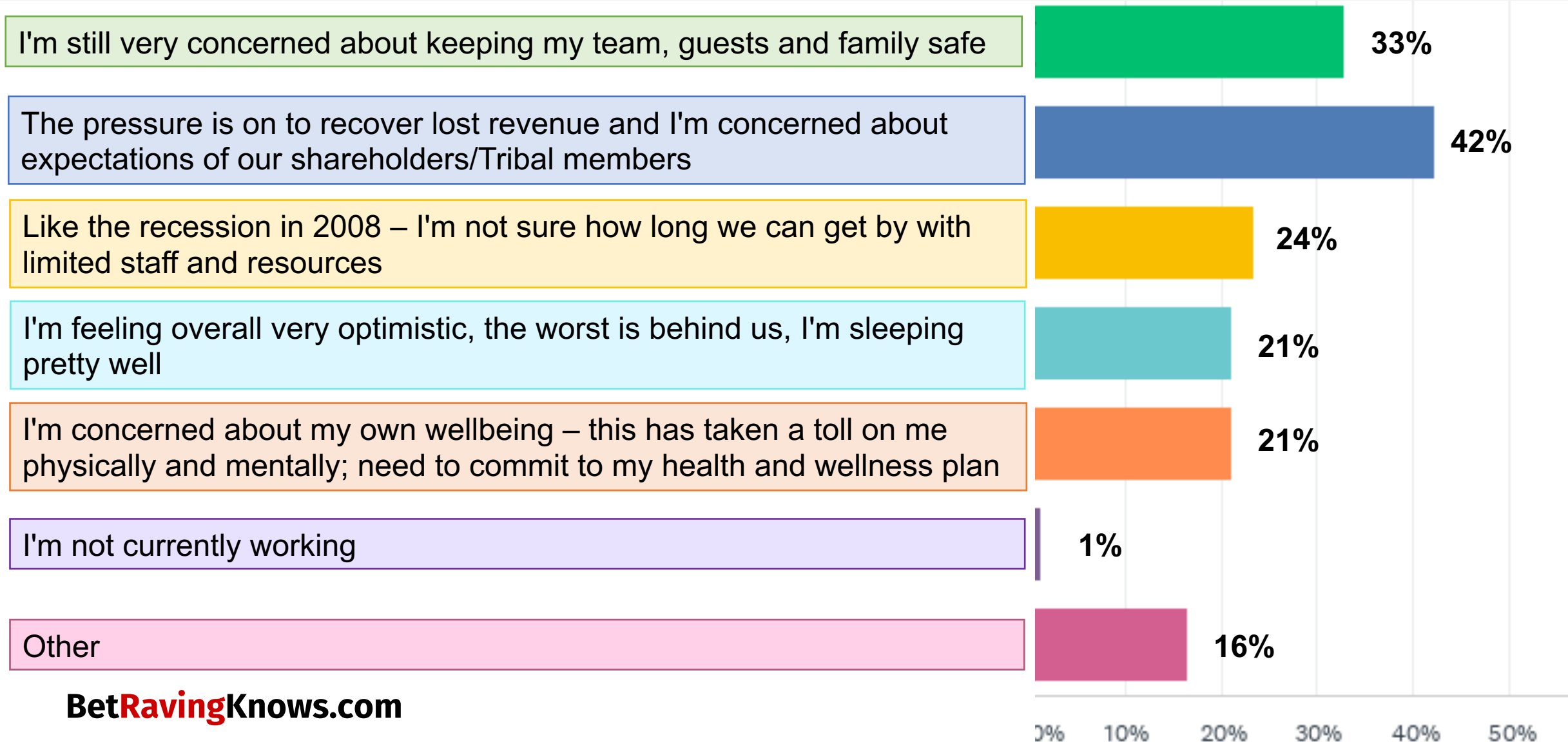
85 respondents participated from the gaming and hospitality industry.

The goal of this survey was to get a pulse and benchmark on marketing, analytics and other initiatives within the gaming industry leading into 2021.



**How many years
have you been in
your current
position?**

What kept you up last night? (select all that apply)

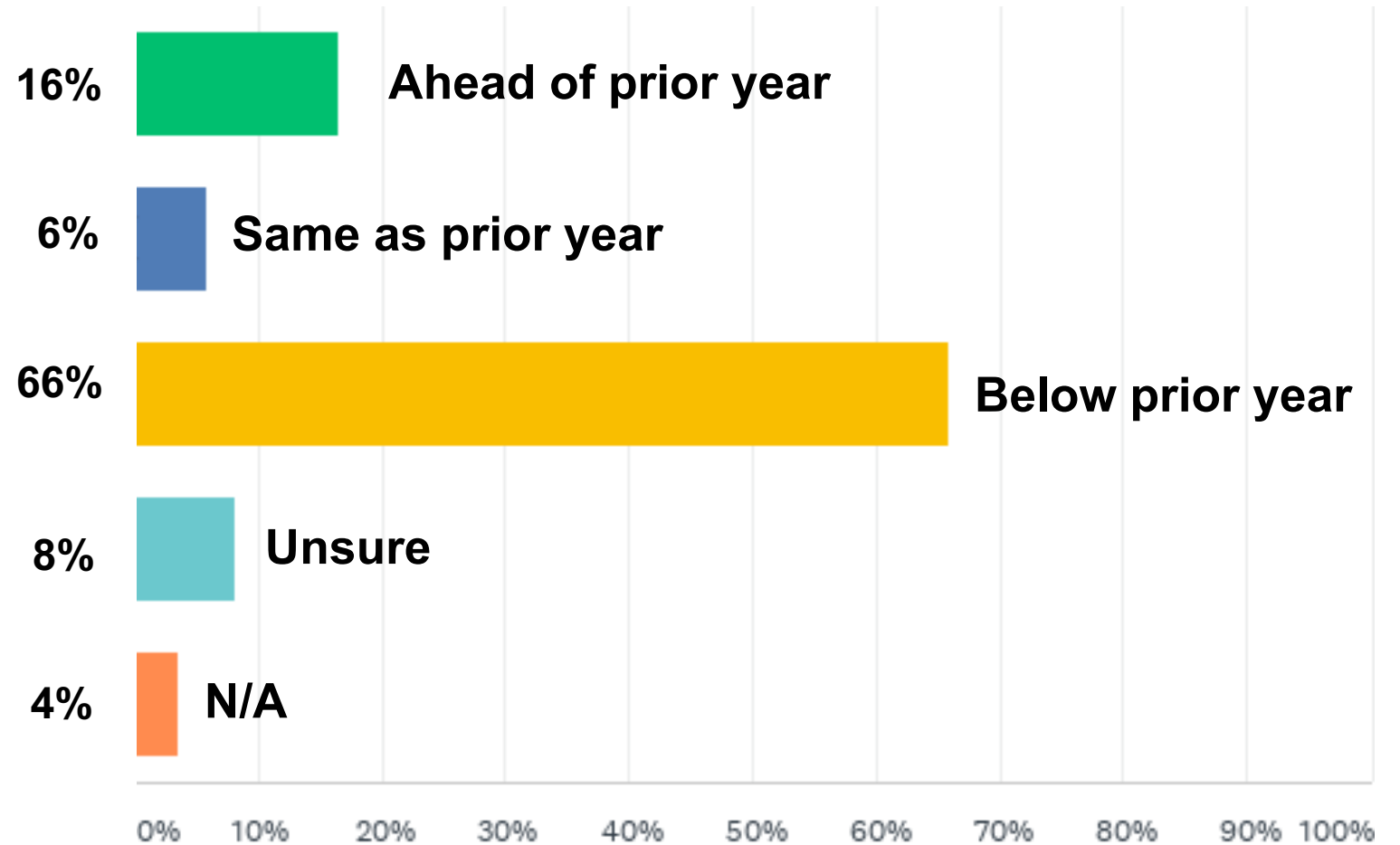


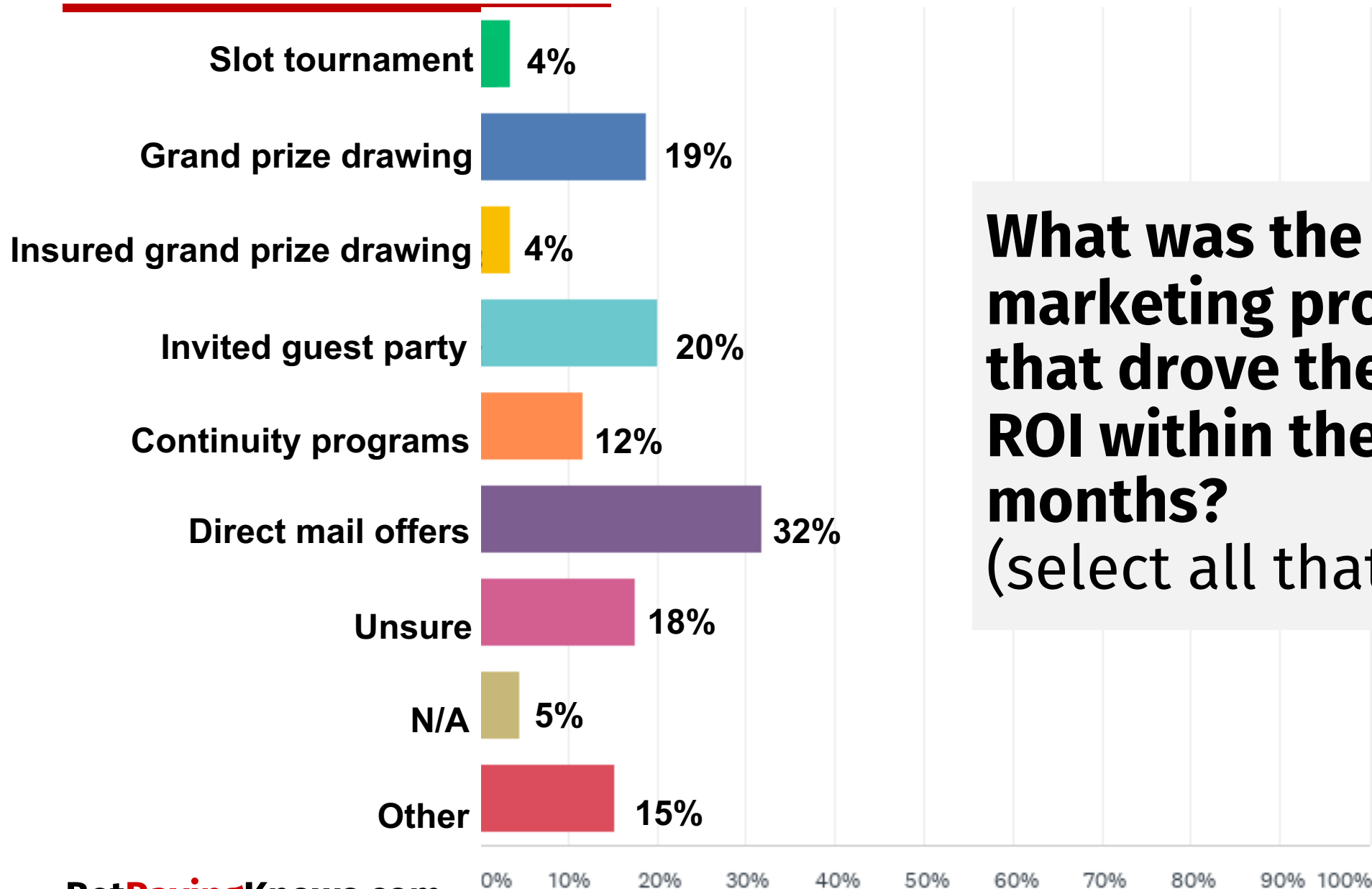
What kept you up last night? (select all that apply)

Other

- My feeling is optimistic, no need to lose sleep over things you cannot control
- Are we moving too fast in regard to attempting to bring in large groups of people
- Low morale and managements failure to acknowledge it or address it
- General stressors driven by professional and personal life combined with drive for success in an uncertain world
- Still awaiting to reopen our casino to the public
- We just need to adjust to the times and find new ways to generate revenue
- How to reassure our guests that we are doing all we can to make our property safe for them to visit
- Tourism market rebound concerns
- I'm concerned about the fact that we can only allow a 25% capacity in our casino
- How to inspire and empower the team
- We still aren't open and haven't been at any time since mid-March 2020
- Our properties are currently closed, and we don't know when they will reopen

Were your revenues in 2020:





What was the marketing promotion that drove the most ROI within the last 12 months?
(select all that apply)

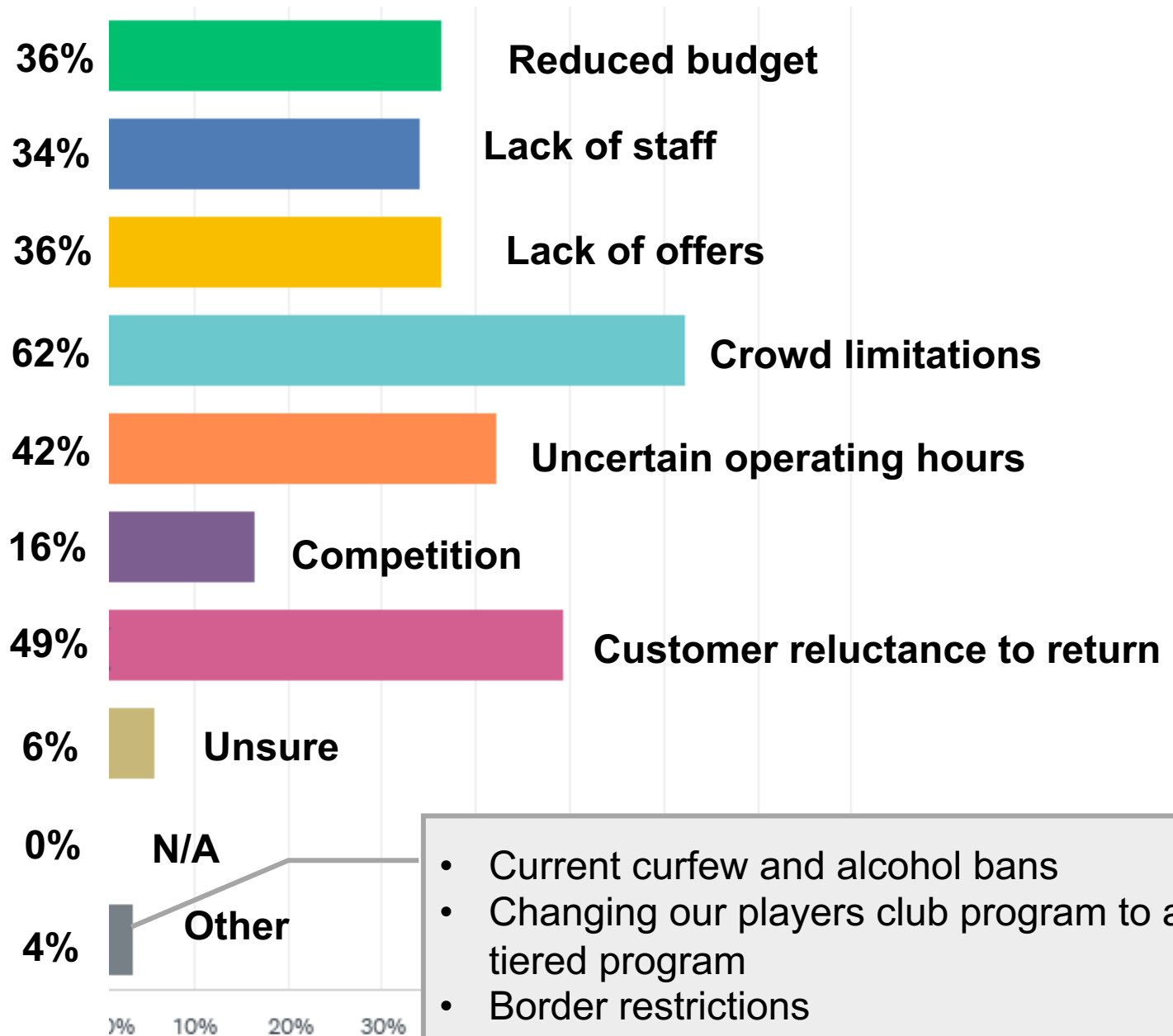
Other

- Gift giveaways
- We have only ran one promotion since we reopened in June; the final drawing held on NYE became a record setting day for our casino
- Personal offers to drive visits
- Promotions were practically zero this year
- Freeplay offer
- Earn and get
- Giveaways, particularly alcohol, have performed quite well
- Local VIP promotions and events
- Online/Social Media promotions
- Bingo
- Play to earn point multipliers
- Moneymaker poker tournament
- Jackpot party

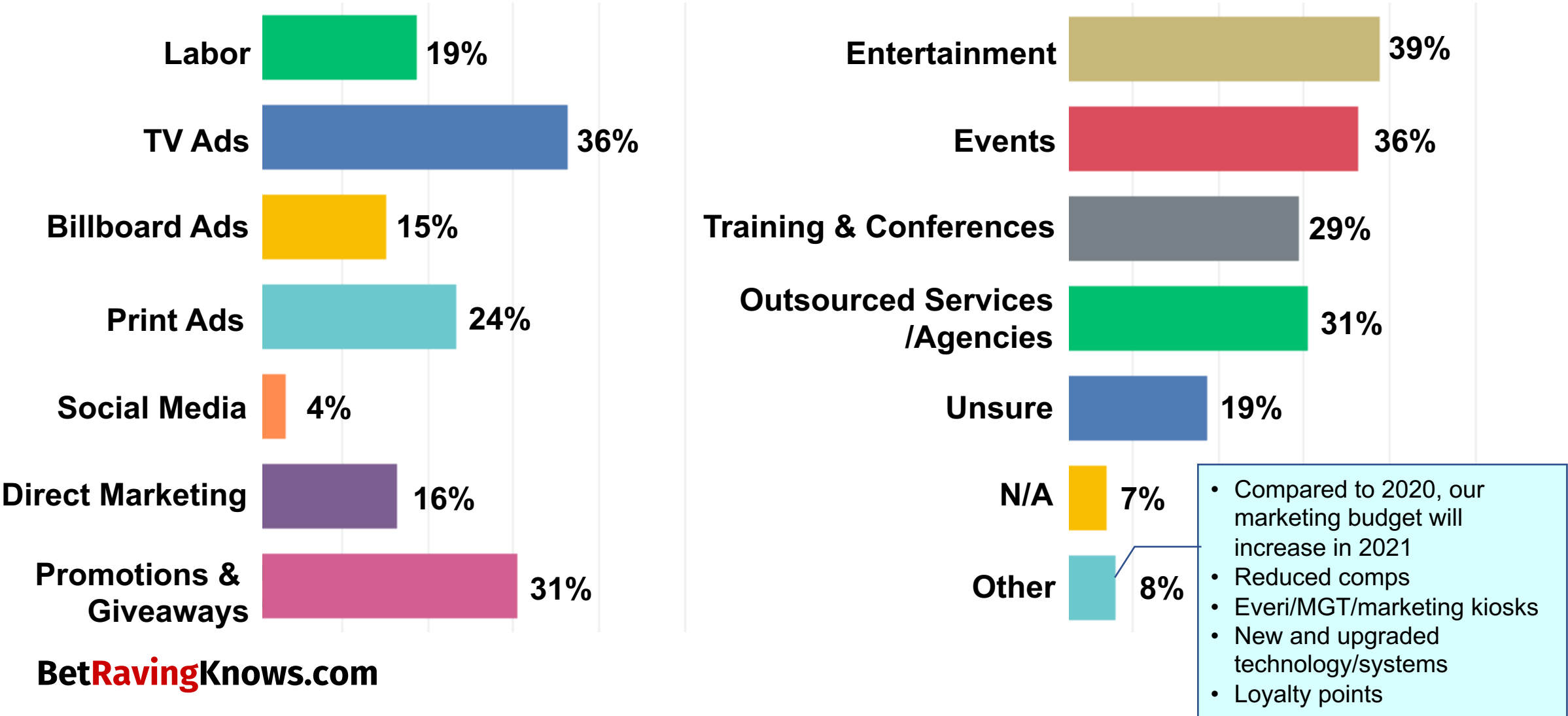
What was the marketing promotion that drove the most ROI within the last 12 months?
(select all that apply)

What are the biggest challenges facing your marketing department in 2021?

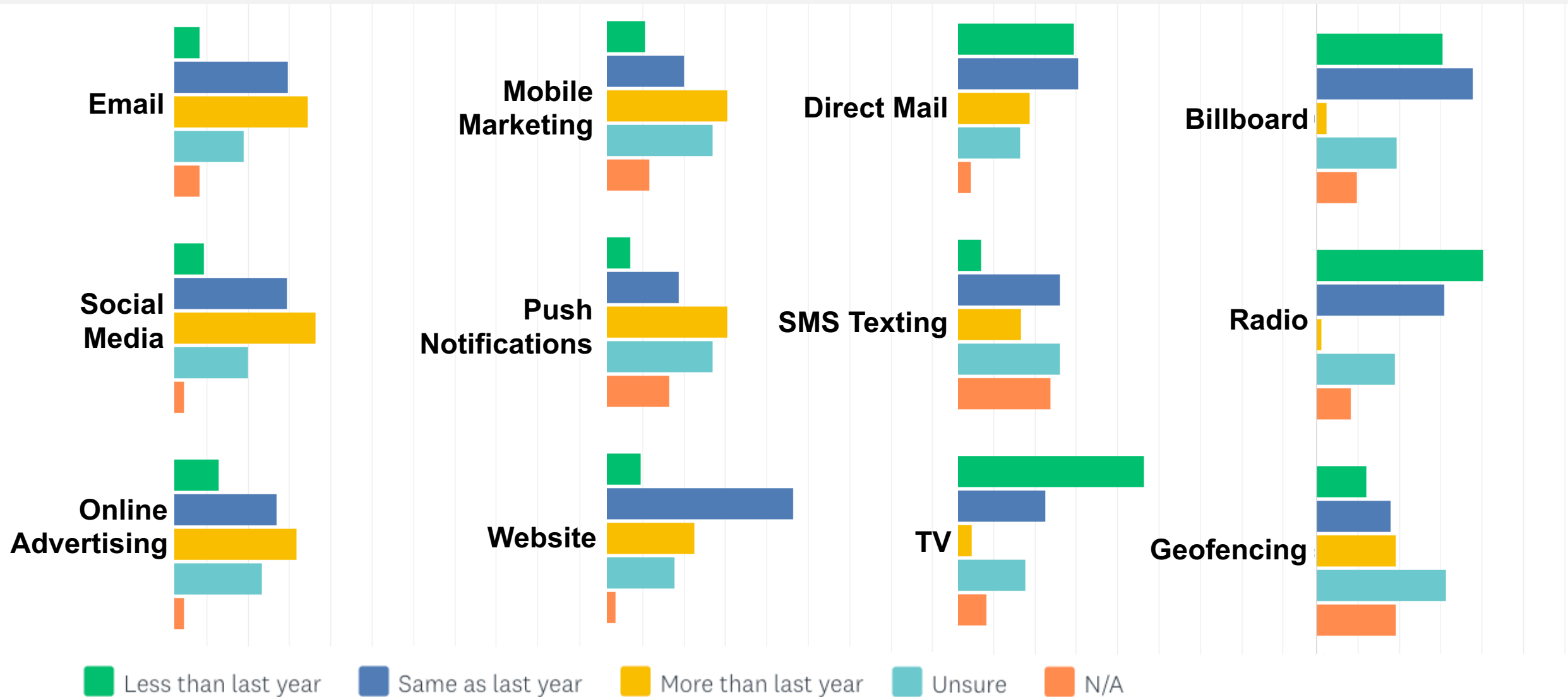
BetRavingKnows.com



If your marketing budget was reduced, which programs do you plan to reduce or cut in 2021? (select all that apply)

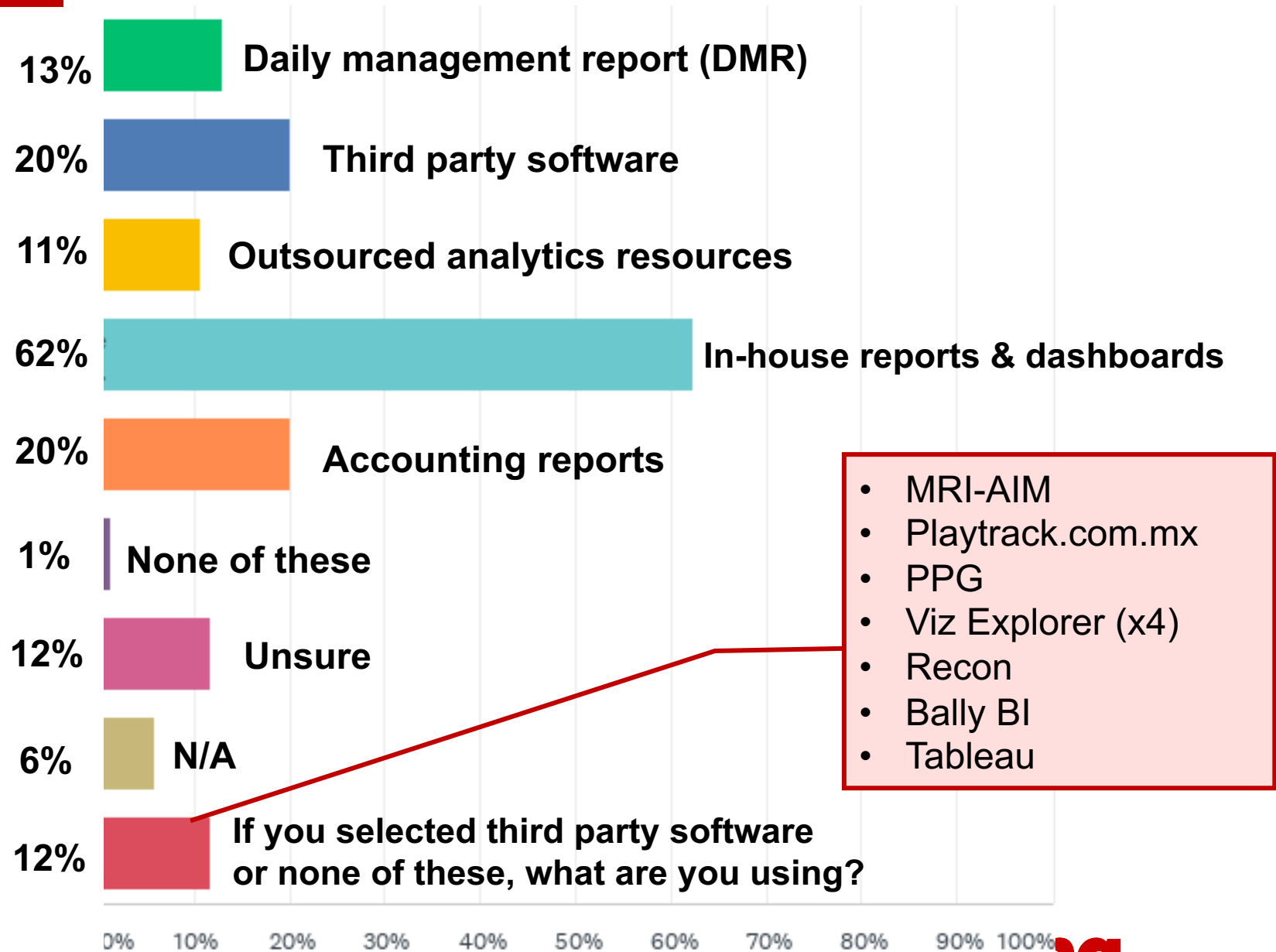


What is your projected advertising spend on these channels?



Less than last year Same as last year More than last year Unsure N/A

What are the analytics tools that you found to be the most useful for making database decisions at your organizations? (select all that apply)



What is the biggest pivot you have made to your marketing department in 2020 and continuing into 2021?

72 Open text answers to follow, grouped by category/theme – these responses have not been modified.

Digital Marketing

- Geofencing
- Investing in building out our property's mobile app.
- Mobil app
- Mobile and digital marketing increases
- Mobile Marketing - 2021
- More analysis and social media
- More on-line on previously unused sites/channels.
- More emphasis on digital and social media marketing
- Email
- Email blast
- Returning to basic branding

Events/Entertainment

- Cost for events
- Entertainment & producing special events w/o gatherings
- Less entertainment
- No entertainment
- No group sales activity in 2020 and only half year in 2021
- No large events
- No live entertainment or events
- Not having concerts and trying to still get people here
- Reduction in entertainment and television advertising

What is the biggest pivot you have made to your marketing department in 2020 and continuing into 2021?

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Promotions

- Changing promotions from in person to virtual
- Changing the number of winners in each promotion
- Drive-in promotion
- Minimal promotions giveaway
- More reliance on direct mail and promotions rather than events for player development
- No large retail promotions and reduction in almost all media
- No promotions. Not by choice of course.
- Promotions and listening to customer feedback.
- Reduction of Retail drawing amounts and frequency to discourage large crowds.
- Switch from drawings to kiosk-based promotions
- Switching from drawings to hot seats on weekends, at least until people can get within 6 feet of one another
- Temporarily discontinuing big giveaways
- We have a more dispersed promotional drawing plan. We have more drawings with less money to avoid the crowds at one time or having people wait in line to get in. Gift giveaways have been the easiest to control crowds so they start earlier and end later to avoid crowds.

What is the biggest pivot you have made to your marketing department in 2020 and continuing into 2021?

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PD/Loyalty

- Embracing PD and relationship building
- Increased freeplay offers
- More direct advertising, finally getting a player development host
- Narrow audience receiving messaging and offers to avoid crowding
- Reduced free play and promotions with less ROI
- Spending more time taking care of the best customers
- Tiered program
- Changing to an earn up structure and de-layering all offers
- To not focus on the volume of people who come into the casino but focus on the quality and get real gamers to come and game
- Better reporting software to better report ROI's

Doing More with Less

- Balancing the unknown while making the most with less
- Concentrate resources on what works best
- Consolidation
- Doing more with less. Staff I mean. Very difficult to hire staff worth a damn. They are getting paid more to stay home with additional funds from unemployment than to work 40 hours a week
- Reduce unnecessary expense
- Restructuring and simplifying
- Complete organizational restructuring and reduction in marketing staff by 80%.
- Reduced staff, major budget cuts
- Reduced Staff, reduced events, driving incremental revenue with limited amenities and abilities
- Reduced staffing

What is the biggest pivot you have made to your marketing department in 2020 and continuing into 2021?

72 Open text answers to follow, grouped by category/theme – these responses have not been modified.

Covid & Safety

- Dealing with COVID restrictions
- Marketing towards our guests as a thank you for returning to our casino
- Post covid 're awakening'
- Safety above incremental revenue. Staying open is crucial
- We focused on communicating the safety measures we have taken against coronavirus and we stopped organizing live entertainment and events
- Due to COVID, we had to close multiple times, so we have cut radio, tv, print. We have concentrated mostly on social and also online networking - Plus our previous draw for new and old customers was our events but now we can't have any events, so we are focusing more on the casino promotions, plus the hotel and RV park to bring in business
- Working from home every day
- Keeping up morale

Pivot & Change

- Being quicker to respond to the market.
- Change in marketing methods
- Changing messaging from being promotional based to simply saying we're open and these are the safety measures put in place.
- Corporate realignment
- Staying agile and continually evolving with the situation
- Thinking outside the box
- To go from Constant promotions and drawings to nearly 0, minimal extra credit, limited food and room comps
- Controlling costs and adding employees to the department to cover major marketing processes that were normally sent out to an agency
- Bringing in both a Database and a Player Development person to help us
- Focus on online gaming and work together to convert land-based customers

What was the most impactful marketing tactic or strategy that made an impact on revenue or player engagement?

58 Open text answers to follow, grouped by category/theme – these responses have not been modified.

Cleaning & Safety

- Advertising our cleaning procedures and infrared cameras for temp when entering. Safe entertainment on the coast
- Ensuring safety and cleanliness of our property during this whole COVID mess
- Highlighting our safety protocols so our guests feel safe coming
- Honest information via social to public
- Marketing our safety standards and delivering a consistent presentation for the guests as it relates to safety
- The most impactful marketing strategy we used was to focus on player safety and enforce masks throughout the casino. It made our players feel safe and chose us over our competitors

Guest Service

- GM interaction with players
- Great service, good food value and clean place

Technology

- Being proactive with cashless gaming
- Bounceback on our mobile app plus gamification
- Change to PKMS Kiosks
- New-interactive digital gaming

What was the most impactful marketing tactic or strategy that made an impact on revenue or player engagement?

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Promotions & Giveaways

- Comps
- Continuity gift program
- Earn up model that opened up all promotions to any card member instead of closed or invited only promotions
- Gift giveaways
- Gifting platform
- Held drawing as "need not be present"
- Guests just needed to activate at kiosk
- Larger cash prizes with momentum to a finale drawing
- Merchandise/alcohol gifts, by a mile
- More smaller, targeted promotions
- Multiple winner drawings
- Promoting Luck!
- Segmented gift giveaways
- Televising promotional drawings to broadcast throughout the property thus avoid large gatherings
- The continuity program was well received, just done over a longer period to reduce the crowds. VIP event was much smaller top tier. Made it more special or exclusive event
- The gift giveaway promotion is a great example of a marketing tactic or strategy. To explain what I mean, we focus on guests that have an ADT of \$60 and up between three chosen months. We invite them to redeem a gift for invited guests only. Uninvited guests are then encouraged to play more to be included next time. Then, we added the option to "Earn and Get." Depending on how much the promotional gifts cost, we calculate how many points a guest needs to earn to redeem the same gift the other invited guests have redeemed

What was the most impactful marketing tactic or strategy that made an impact on revenue or player engagement?

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Loyalty Club & Player Development

- Hotel offers
- Re-branding the restaurant buffet and reducing free play to lower value guests
- Building personal relationships through contact
- Direct contact upon reopening
- Face to face contact
- Focus on the VIP players has been the most impactful, \$250+ ADT
- Freeplay offers
- Good old basic one-on-one with players. Developing relationships on a one-to-one basis
- Host sales training/measurement
- Hosts
- Hosts personally contacting guests to check-in. Letting them know what amenities are available to them when they feel comfortable returning
- More targeted offers based on “what have you done for me lately” strategies
- NYE fully focused on known gamers and hotel rooms booked to players with ADT of \$500 or above
- Player development and safety protocols makes people feel safe to come here
- Player development calling guests during quarantine Checking on them and keeping us on their mind during our shut down
- Reaching out to guest via phone calls and texts
- The carded play hot seat drawings that we started earlier and ran the entire day helped the slowest day (Monday) to increase traffic and carded play
- The players (loyalty) club and the promotions
- VIP events

What was the most impactful marketing tactic or strategy that made an impact on revenue or player engagement?

58 Open text answers to follow, grouped by category/theme – these responses have not been modified.

Covid & Safety

- Digital communication/email etc.
- Email and social media marketing
- Increased jackpot advertising frequency. Just about the only thing we can highlight that hasn't changed
- Increased player engagement through email surveys
- More personalized marketing engagement via phone calls mail and emails
- Shift away from direct mail to online communication

Pivot & Change

- Direct mail
- Direct mailing
- Good, old fashion, direct mail
- Monthly segmented offer
- Revamp of the direct mail strategy

Your thoughts?

Are you facing a lot of changes in 2021? Raving can help you optimize your operations with outsourcing or training. Contact amy@betravingknows.com or call 775-329-7864.

If you'd like to participate in future surveys, please visit TGandH.com/subscribe.

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