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SPORTS BETTING TECH
CASINOS AND LOCAL ATTRACTIONS
ICE LONDON PREVIEW
REGULATORY REACTIONS

Eyes on the Prize

GGB's Annual

25
People to
Watch

Stephanie Bryan
Tribal Chairwoman and CEO
Poarch Band of Creek Indians

**Making
Tribal
Book**

How California
is planning
to legalize
sports betting

**POGO
Possibilities**

Why Philippine
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25 People to Watch 2020

Our annual profiles of 25 People to Watch showcase the top executives in the business, and why they will have an impact on the industry in the year to come.

By Dave Bontempo, Brendan Bussmann, Roger Gros, Edward N. Healy, Frank Legato, Marjorie Preston, Patrick Roberts, and David Ross



On the Cover:
Stephanie Bryan,
Tribal Chairwoman
and CEO, Poarch
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Photo Credit: Jon Cook,
High 5 Productions



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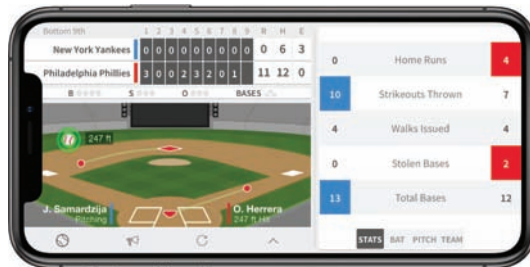
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Learning Curve

By Roger Gros, Publisher



It was my first night as a dealer at Caesars Boardwalk Regency in Atlantic City. The year was 1979. Before this night, I had never been in a live casino before. Other than how to deal the game, I knew nothing.

When I was in eighth grade, my class took a field trip to Marshall Hall, an amusement park on the banks of the Potomac River in Maryland. On the edge of the park was a pier. At the end of that pier there was a big building with a couple of hundred slot machines, although I didn't really know what they were at that time.

That was the extent of my casino experience up until that night at Caesars.

I knew nothing.

While I'd been chosen to be an original dealer at Caesars, my license investigation wasn't completed for four months (another long story), so instead of starting in May with the others, I didn't begin until September.

Being at the bottom of the barrel, so to speak, I was assigned to deal a \$2 blackjack game. For the next year, that was my home. Occasionally I graduated to a \$5 game (New Jersey regulations required casinos to offer a certain percentage of low-limit games in those days), but I worked nine or 10 hours a day, six days a week, dealing to all seven spots on these blackjack games.

Lesson? If this was the corporate ladder, I was at the bottom rung.

Frankly, it was driving me crazy. We weren't allowed to talk to the players. "Dummy up and deal," my bosses would scold. Once, when one of my players took a swan dive, fainting backwards in the middle of a hand, my supervisor insisted I continue dealing and not worry about the gambler down. Since another player had already taken the stricken player's place, I guess he was right.

So I asked my casino manager if I needed to learn a second game in order to be promoted to that glorious supervisory position. He told me not to bother, I was just as likely to get a promotion knowing one game as knowing five. Wrong.

I just couldn't take it. Blackjack was sapping my soul. So when they announced a baccarat class, I jumped at the opportunity, even though I didn't have a clue what baccarat was all about.

Turns out, baccarat saved my casino career

along with my sanity. In those days, the game was played at a big table with seven positions at each end. You worked in a crew, just like a craps game, so you had to work together to deal an efficient game.

And I was good at it. The "no talking" edict wasn't as strictly enforced, because the players enjoyed limited banter with the dealers. The "stickman" held the attention of the table, as he or she announced the results of each hand. The base dealers were very skillful with the chips and the "lammers" that would mark the commissions.

There was a camaraderie, not only among the crew but also with the supervisors. Everyone worked together to create a seamless experience for the players and for management to see what was going on.

After a couple of years, I was a senior dealer and expecting a promotion. Soon after a dealer I had broken in was promoted ahead of me, I was recruited by the Golden Nugget, which had opened a year earlier. It had the biggest baccarat action in town, once the property of Caesars.

Lesson? Sometimes a lateral move is the best move.

Again, working at the Golden Nugget transformed my life. It had a completely different attitude than Caesars. Dealers were encouraged to be friendly with the players, cultivate relationships and create loyalty with customers. I got to meet Steve Wynn several times when he came to sit at a dead baccarat game and shoot the breeze with us dealers. His approachability and insight into our lives was invaluable.

When Steve Wynn sold out, I like to say I left the business, but I actually followed a couple of Golden Nugget executives to Showboat at the other end of the Boardwalk. But I didn't last long. It was the worst, but led me to support myself and my family by writing about gaming.

Lesson? No matter the good intentions, you are always at the mercy of the corporate structure.

I often think of that first night dealing in Atlantic City when I knew nothing. I learned a lot over the next 35 years, but the most important lesson I learned is to live your dream. Don't let a menial thing like a job get in the way.

Reach for the stars, and you might grab a few.

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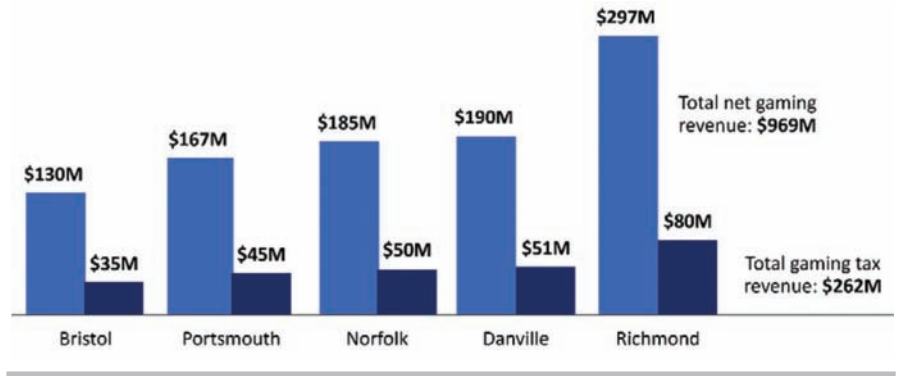
Let's go!



CARRY ME BACK

One of the few states that hasn't legalized casinos is Virginia. But that may change. In 2018, the Virginia legislature came close to legalizing casinos, but instead opted for a study conducted by the Innovation Group and Regulatory Management Consultants for the legislature's Joint Legislative Audit and Review Commission. The study focused on five cities that had expressed interest in hosting casinos. The study showed that single casinos in each of the five cities would generate almost \$1 billion in revenue, resulting in total gaming tax of \$262 million at a blended 27 percent tax rate. While the most lucrative casino would be located in Richmond, the report indicated that revenues from a casino in Northern Virginia would dwarf any of the five prospective casinos. Officials im-

Five casinos projected to generate approximately \$260 million in state gaming tax revenue (2025)



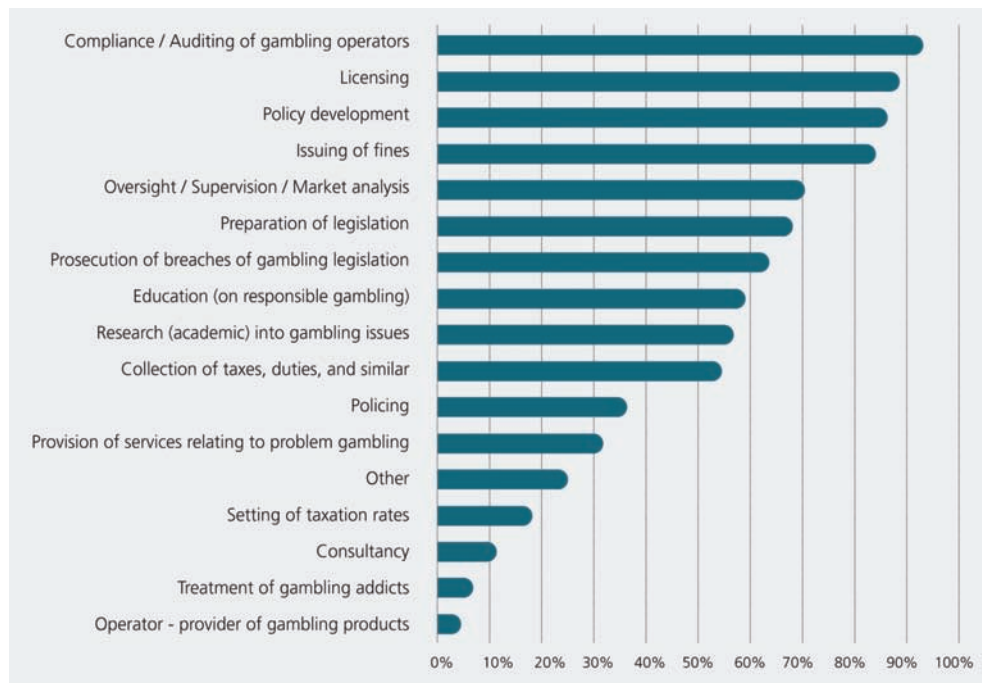
mediately shot that idea down because they feared competition from MGM National Harbor just across the Potomac River in Maryland. Since the release of the study, other cities have indicated an interest in hosting casinos. The study also suggested a casino operated by the Pamunkey tribe

would also have an impact. And the historic horse racing machines (HHRs) operated at Colonial Downs racetrack outside of Richmond and four other sites would also be affected. So far, it's not clear what the next step for the legislature will be in legalizing casino gaming.

Rules & Regs

The International Association of Gaming Regulators (IAGR) in November 2019 released an annual study on gambling regulation around the world. The goal of IAGR with this study is to evaluate the size of the gambling market in different countries, comparable data for the gambling market in different countries, and regulated gambling types in different countries. The regulatory agencies have many things in common including words used in their mission statements as well as the powers assigned to them. Even though it's a high number, it's surprising that a full 7 percent of regulators do not have the ability to perform audits and assure compliance with the companies they oversee or that 11 percent are not tasked with licensing. To obtain a full copy of the report, visit www.iagr.org/industry-news.

Regulatory powers held by gambling regulators (by percentage of respondents)





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5 QUESTIONS

Scott Butera

President, Interactive, MGM Resorts



Scott Butera made his name in the gaming industry early on by working as a turnaround expert. His ability to refinance and reposition companies was on full display during his time with the Trump organization, the Tropicana Las Vegas, and Foxwoods. Then he pivoted to become commissioner of the Arena Football League for a few years.

Now with MGM, Butera is in charge of the company's interactive efforts including sports betting, social casinos and iGaming. He met with *GGB* Publisher Roger Gros at his offices at Bellagio in December. For a podcast of this interview, visit GGBMagazine.com.

GGB: You've had such a varied career. What made you take on this challenge at MGM?

Butera: This is a really important job to me. I enjoyed being an operator, and I love the gaming business. But I also had a real passion for sports. My time with the Arena Football League allowed me to understand the business of sports. I began to realize that people are changing the way they consume sports. No longer do they just watch games or matches. They want to interact—to be part of the action. You could almost see the writing on the wall for sports betting.

So this was a great opportunity for me. I had a background in gaming and sports. I've always had tremendous respect for MGM. I've known Jim Murren for years. It's a big company and we do things in scale. So rather than just look at sports betting, we want to have a really broad interactive platform and use sports betting as a portal to many other things.

What is MGM's approach to sports betting?

Even before I got here, MGM had realized that the sports fan is a really meaningful customer for everything we do in the resort business. People who watch sports and engage in sports betting also go to hotels, they eat at our restaurants and bars, they play our table games and slots. It's a robust customer base, so let's create a platform that has sports betting, both retail and online, social "play for fun" gaming in states where online gaming isn't legal and iGaming, and then tie that into our casinos and resorts. It's about a five-year proposition.

For us, it's about building the brand, building the platform. We're not in a rush. We're not paying huge bonuses or doing extensive advertising. Our approach is that there are no billboards for Ferraris.

Tell us about Roar, MGM's partnership with GVC.

One of the things we didn't have when I got here was a sports betting platform. We spent a lot of time deciding how to approach this. Rather than develop one ourselves (very risky) or buy a company that already had one (an expensive proposition), we decided to partner with GVC Holdings, which was the largest sports betting company at the time, based out of London. They have their own proprietary technology. They have thousands of developers and 600 traders, so now we have that proprietary technology that few other companies have. It's an important joint venture for us.

IGT helped develop a sports betting app in Nevada for MGM. Are you still working with them?

Not in sports betting, but we have a great relationship with IGT across the board. They're one of our biggest partners. They did a great job in the sports world, but we couldn't pass up this opportunity with GVC.

What has been MGM's experience with online gaming in New Jersey?

We've been very successful in New Jersey, but it's very competitive. They've done everything right, from a good regulatory process to a reasonable tax rate. But because they were the first and the best, everyone flocked there, and the competition is fierce. Now that we have our New Jersey app out, we've become more competitive.

We've always done well with iGaming in New Jersey, which is a great complement to sports betting. They go extremely well together. When they're not betting on sports they're playing casino games, either tables or slot games. It's a great fit.

"They Said It"

"Seriously now, I am telling you: do not dupe Filipinos, because Filipinos are not fools. If you make a fool out of me, I will punch you. I will have you called here and punch you, like the others. I've punched many people here; maybe you want to be next."



—Rodrigo Duterte, president of the Philippines, promising dire consequences for offshore gaming operators who do not pay their past-due taxes

CALENDAR

January 10-12: National Council of Legislators from Gaming States Winter Meeting, Marriott Marquis & Marina, San Diego. Produced by the National Council of Legislators from Gaming States. For more information, visit ndcls.org/meetings.

January 17: Artificial Intelligence, Biometrics & Big Data in the Gaming Industry: Privacy Protections and Public Policy, University Nevada, Las Vegas. Produced by the UNLV Boyd School of Law. For more information, visit <https://bit.ly/2YxZf1M>.

February 4-8: ICE London 2020, ExCeL Centre, London. Produced by Clarion Gaming. For more information, visit ICELondon.UK.com.

February 5-8: iGB Affiliate London 2020, ExCeL Centre, London. Produced by Clarion Gaming. For more information, visit iGBAffiliates.com.

February 10-13: 5th Annual Western Indian Gaming Conference & Tradeshow. Produced by California Nations Indian Gaming Association. For more information, visit CNIGA.com.

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

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

March 8-10: Casino Marketing Bootcamp, 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.



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Paying the Piper

Resort fees provide needed transparency



By Chris Cylke

World-class hotels and resorts provide more than just luxurious rooms. They provide the amenities and services that make travel comfortable and memorable, with an attention to detail valued by busy and discerning guests.

Part of the guest service is providing a seamless experience, from the booking process through to checkout at the end of a stay. That's why the casino industry fully embraced the Federal Trade Commission's 2012 expert guidance on resort fees, which has benefited travelers and brought additional transparency to the marketplace.

The American Gaming Association's (AGA) constant focus on customer service includes prominent, clear and repeated disclosure of resort fees throughout the booking process with all fees included in the total price at checkout. It's in our best interest that customers know what they're paying for upfront. And by bundling amenities like Wi-Fi, pool usage and gym access into one cost, resorts can provide the best value for guests.

In fact, consumers understand the value of resort fees to their experience. According to research from the American Hotel & Lodging Association (AHLA), four out of five consumers, or 80 percent, say they're willing to pay resort fees if the amenities are worth it. Further, guest satisfaction for resorts that charge resort fees is very high, with an average customer sat-

isfaction rate of approximately 90 percent.

The Hotel Advertising Transparency Act, filed by United States Reps. Eddie Bernice Johnson (D-Texas) and Jeff Fortenberry (R-Nebraska), would require any fees, aside from taxes, to be shown in the price of a hotel room advertised to

consumers. While that may sound reasonable in theory, the proposed legislation is not only unwarranted, but would actually promote less transparency about the types and cost of amenities included in the cost of a customer's stay.

According to AHLA, a strong majority (70 percent) of consumers have a positive perception of breaking out resort fees from the cost of the room, describing it as transparent, easier and direct. Moreover, current laws and regulations available to federal and state enforcement agencies already empower them to pursue any

entities engaged in truly deceptive advertising practices.

Consumers have lodging choices. By choosing to stay at a property with a resort fee, they have signaled that the first-rate service and amenities made possible by such fees are an important differentiator. It's a priority of the AGA to set the story straight on resort fees. That means standing behind our members' track record of good-faith transparency and providing unparalleled guest experiences.

Chris Cylke is senior vice president, government relations for the American Gaming Association.

“By choosing to stay at properties with a resort fee, consumers signal that the first-rate service and amenities made possible by such fees are an important differentiator.”

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Good for Gaming

Last year proved to be a healthy and prosperous year for gaming investors, but what about the worries as we enter 2020?

By Frank Fantini



As of this writing, the year is drawing to a close, and U.S. stocks, including those of gaming companies, were about to conclude a healthy 2019.

The Fantini Index of North American Gaming Stocks, for example, is up 27 percent.

The rise about matches that of the broader indices that have danced at record levels, such as the S&P 500, Nasdaq Composite, Russell 2000 and of course, the venerable non-index, the Dow Jones Industrial Average.

This strength has come despite a stream of news and worries that in past times rattled stocks—fear of an oncoming recession, trade war and impeachment inquiries into the president of the United States.

It would not be unreasonable to say there is a complacency that may be the prelude to a come-uppance.

And yet, the statistical evidence shows little sign of the kind of froth that precedes a downfall, no less a bubble to be burst. The most important of them for the gaming industry, where consumer confidence and possession of discretionary income are essential, is employment, and that is booming.

There are other signs of the kind of economic strength to support consumer discretionary stocks: the higher home rental and for-sale housing prices, which seemed to be building to worrisome levels, appear to be slowing. When a report is released that sparks fears, such as a decline in durable-goods orders, the next month brings a bounce-back. Wages are growing, giving purchasing power and parity of wealth to consumers. And while incomes grow, inflation remains below targets, perhaps suggesting the targets are becoming anachronistic and a new balance has been struck between growth and prices in our increasingly technologized society.

Even the national political mood appears sanguine, despite the daily excitement over the latest Twitterverse hullabaloo or viral video or predictions of apocalypse from the talking heads of CNN, Fox News and MSNBC. Opinion polls

show basically a public non-reaction to these tempests. Yes, people respond with anger, often self-righteous and hateful, but opinions are barely shaken.

One instance of shaken opinion has occurred—the dramatic drop in support for presidential candidate Elizabeth Warren since she revealed something approaching the true cost of so-called Medicare For All. Apparently, all the anger that spews out in social media and polls about young Americans embracing socialism dissipates in a common-sense reaction to a truly—to use one of the politicians' favorite phrases—bold plan.

Nor is there sign of a bubble in stock prices, at least not in gaming stocks. Prices might be higher, but they're supported by better earnings, more effi-

“(Gaming stock) prices might be higher, but they are supported by better earnings, more efficient management by casino operators and financially healthy consumers.”

cient management by casino operators and, as mentioned, financially healthy consumers.

Indeed, investors seem to be reacting rationally, in some cases even conservatively, to companies. While stocks overall are up by double digits, companies with profits growing sluggishly have stock prices that have moved sluggishly. For those who stumble, such as games provider AGS, the market has shown it can be punitive, cutting the stock in half despite a sound long-term story. Those are not signs of a bubble.

So what will the new year bring? On the consumer confidence front, 2020 is an election year, a natural time of optimism. The coming year could

prove different depending on how the Donald Trump impeachment plays out, but there is no real precedent for a bear market based on impeachment.

A greater threat might be the economy bumping up against labor supply limits and inflation touched off by resultant higher wages, but wages have grown 4 percent in the past year with no apparent inflation.

In the gaming industry, the positive story isn't just the economy. Mergers and acquisitions are supporting the stock prices of selling companies on higher valuations fed by REITs, while confidence that acquiring companies will slash costs is supporting their stocks.

And, of course, there's sports betting, the topic of the year in 2019, which promises to be the topic of the year in 2020 too.

Already, 19 states have legalized sports betting, and others stand in the wings. In many cases, they include online wagering that, with the popularity of in-game betting, promises to make sports betting more than the minimally profitable amenity it historically has been.

One potential ramification to look for is legislative and regulatory action if wagering, and especially sports betting, is seen as becoming pervasive and a problem gambling risk. The continuing tightening of governmental policies in the U.K. may serve as an example of what could happen in the U.S., though there's some belief that American gaming leaders are ahead of the curve in promoting responsible gaming.

Those cautions aside, in the final month of last year there appeared to be a lot of green lights, few yellow ones and perhaps no red lights.

However, before we get too comfortable in projecting a trouble-free 2020, one last thought: The positive conditions described above are the very components of complacency. And complacency can turn fatal.

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

AGEM MEMBER PROFILE



Founded in 2001, **Touch Dynamic** is an ISO 9001:2015 Certified manufacturer of all-in-one touch systems, kiosks, mobile POS devices and industrial PCs for a variety of industries. Based in South Plainfield, New Jersey, Touch Dynamic understands the demands on its channel partners and provides unique products and additional value-added services to help them meet the specific needs of their customers.

Touch Dynamic provides all-in-one touch computers, touch-screen monitors, small form factor PCs, tablet and mobile POS devices, kiosks, and point-of-sale peripherals like receipt printers, customer displays and cash drawers.

Touch Dynamic recently released its first-ever gaming tablet designed exclusively for casinos and bingo halls. Officials believe it will be unique to the gaming community and enhance the customer experience at casinos and bingo halls.

For the first time, Touch Dynamic will be exhibiting at the ICE trade show in London, the largest gaming expo in the world, where it expects good exposure for the new gaming tablet. Touch Dynamic will also be attending the National Retail Federation (NRF) in January.

Touch Dynamic works with almost a dozen distributors in the U.S. and internationally and provides extensive tech support for all its products.

For more information, visit www.touchdynamic.com



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 – December 2019

- Following a recent wave of press reports on unregulated machines, specifically in Pennsylvania, Illinois, Virginia, Missouri and Nebraska, AGEM and the American Gaming Association are working together on a project to put a spotlight on unregulated machines and the overall threat they pose to regulated gaming in the long term. A short fact-sheet document highlighting the difference between regulated and unregulated gaming is being prepared as an effective way to spread the message to a wider audience. Additional support is being provided by state gaming associations, corporate casino companies, problem gambling organizations and independent test labs.
- Connie Jones, AGEM director of responsible gaming, recently attended the 29th Executive Development Program in Lake Tahoe as a judge. AGEM has been a major sponsor of the EDP, which aspires to be the place to learn, grow, and network with the next generation of industry leaders. This year's program was titled "Confronting Challenges and Embracing Opportunities: Strategic Leadership in the Gaming Industry." There were seven eight-member teams from gaming jurisdictions around the world, which included the ECA/AGEM/Clarion Gender Diversity Scholarship winner Dolly Sananes Bascou from Monte-Carlo Société des Bains de Mer. Each team prepared a proposal for an integrated resort in a gaming jurisdiction. The winning team's proposal focused on the reimagining of the Circus Circus Casino in Las Vegas.
- AGEM members recently approved the decision to once again support the National Indian Gaming Association (NIGA) Indian Gaming Tradeshow & Convention, March 24-27 in San Diego. The \$50,000 contribution is for Platinum sponsorship of the event.
- The AGEM Cup Golf Tournament and Holiday Reception took place on November 22 at the Bali Hai Golf Club, Las Vegas. This year's tournament winner was Konami and the team of Tom Jingoli and John Garner. Second place went to Scientific Games and third place went to Aristocrat.
- AGEM membership reached an all-time high of 177 in December with four new Associate members. eConnect in Las Vegas develops technology which delivers actionable information to the gaming and hospitality industry. General Touch Co. Ltd., based in China, is a leading manufacturer of touch screens and touch solutions. Nutanix, based in San Jose, California, is a global leader of hyperconverged data systems, and UL, based in Northbrook, Illinois, promotes safe and secure working environments.

FORTHCOMING EVENTS

- The UNLV Boyd School of Law Speaker Series, Artificial Intelligence, Biometrics & Big Data in the Gaming Industry, will be held January 17. This all-day conference brings together industry experts and policy leaders to cover the foundations, legal framework, and potential gaming regulatory issues for this emerging technology while analyzing future discussion for best practices and model regulations.
- ICE 2020 will take place February 4-6 in London. AGEM will have a booth located in the North Halls and looks forward to welcoming friends and members as well as meeting proposed new members.

AGEM Index Companies	Stock Price			Percent Change		Index Contribution
	Nov '19	Oct '19	Nov '18	vs. Prior Month	vs. Prior Year	
Agilysys Nasdaq: AGYS (US\$)	25.33	25.19	16.49	0.6 ▲	53.6 ▲	0.05
Ainsworth Game Technology ASX: AGI (AU\$)	0.69	0.80	0.76	-13.8 ▼	-9.2 ▼	-0.37
Aristocrat Leisure Limited ASX: ALL (AU\$)	33.92	31.62	23.40	7.3 ▲	45.0 ▲	11.58
Astro Corp. Taiwan: 3084 (NT\$)	13.50	15.60	27.75	-13.5 ▼	-51.4 ▼	-0.08
Crane Co. NYSE: CR (US\$)	83.07	76.52	86.37	8.6 ▲	-3.8 ▼	6.44
Everi Holdings Inc. NYSE: EVRI (US\$)	13.47	10.06	6.72	33.9 ▲	100.4 ▲	4.98
Galaxy Gaming Inc. OTCMKTS: GLXZ (US\$)	1.90	2.10	1.48	-9.8 ▼	28.0 ▲	-0.05
Inspired Entertainment, Inc. Nasdaq: INSE (US\$)	6.99	7.35	5.40	-4.9 ▼	29.4 ▲	-0.12
International Game Technology PLC NYSE: IGT (US\$)	14.85	13.24	17.21	12.2 ▲	-13.7 ▼	5.57
Konami Corp. TYO: 9765 (¥)	4,820	4,770	5,080	1.0 ▲	-5.1 ▼	-0.27
PlayAGS Inc. NYSE: AGS (US\$)	11.49	11.54	22.45	-0.4 ▼	-48.8 ▼	-0.03
Scientific Games Corporation Nasdaq: SGMS (US\$)	27.36	23.99	19.48	14.0 ▲	40.5 ▲	5.41
Transact Technologies Nasdaq: TACT (US\$)	11.21	12.36	10.30	-9.3 ▼	8.8 ▲	-0.12

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The AGEM Index increased by 33.01 points in November 2019 to 540.65 points, a 6.5 percent gain from October 2019. The growth was driven largely by a 7.3 percent increase in the stock price of Aristocrat Leisure Ltd. (ASX: ALL), which climbed from AU\$31.62 to AU\$33.92. The stock was responsible for 11.58 points of the AGEM Index's monthly gain. Crane Co. (CR) experienced an 8.6 percent stock price gain from \$76.52 to \$83.07, which led to an index contribution of 6.44 points. Overall, most AGEM Index companies reported increases in stock price during the month, with seven trending positively and six moving negatively. The major stock indices performed well as the Dow Jones Industrial Average and the S&P 500 experienced monthly growth of 3.4 percent and 3.7 percent, respectively. The NASDAQ also experienced a strong gain of 4.5 percent.

California Dreaming

The journey to **sports betting** in the Golden State

By Jesse Robles

It's 2020 and it's well understood that gambling has had a storied role in American history. In the pre-colonial era, European settlers with their own gambling traditions observed Native American tribes wagering with peach pits for dice and even betting on live football-type sports. Today, sports betting is legal in 19 states, with legislation pending in 25 more, in a year when total revenues are expected to surpass \$1 billion.

Now and Then

In those 400 years of history, gambling has remained part of the ethos while adapting and evolving to the historical fluctuations in American mores. One pivotal moment in that history was in 1987, when a Supreme Court decision in *California v. Cabazon* recognized the inherent sovereign authority of Indian tribes to regulate gaming within their tribal jurisdictions.

A year later, in 1988, at a time when gaming on tribal lands was limited to high-stakes bingo, Congress passed the Indian Gaming Regulatory Act (IGRA) to "provide a statutory basis for the operation of gaming by Indian tribes as a means of promoting tribal economic development, self-sufficiency, and strong tribal governments."

This legal framework came into existence after years of speculation and fears that organized crime would infiltrate and take over tribal gaming operations. Over time, those fears have been proven baseless. Tribal gaming operations function under a robust set of federal and tribal regulations, with operational integrity as the cornerstone.

The Long Game

Since the *Cabazon* decision and subsequently, IGRA, California has remained a testing ground for the tribal government gaming model. Having always been under close observation, tribes have historically moved cautiously, fully understanding that any actions taken by tribes today would invariably affect generations to come.

This remains the case as demonstrated by an initiative measure that was announced for the 2020 ballot by a cohort of 18 tribes late last year.

The measure, entitled the California Sports Wagering Regulation and Unlawful Gambling Enforcement Act (SWRUGEA), would amend the state constitution to allow for sports betting, with conditions, at Indian casinos and racetracks.

Tribes say card rooms should be prevented from participating in sports betting because they offer illegal gambling and have been the targets of federal prosecution. Southern California's Hawaiian Gardens card club was recently fined millions of dollars by state and federal regulators for violating currency transaction rules.



The Third Inning

For some, the move is reminiscent of Proposition 1A in 2000, which allowed the state to negotiate gaming compacts with federally recognized tribes in its boundaries. The compacts precluded the state from operating Vegas-style gaming in return for a percentage of tribal gaming revenues.

Just eight years later, voters approved four more propositions allowing tribes to triple their number of slot machines in exchange for a higher share of tribal gaming revenues. Since the initial compacts, tribes have contributed more than \$918 million to revenue-sharing funds in addition to the hundreds of millions more in local and state taxes.

This time, however, tribes come to the table with not only decades of experience in working directly with the federal government but a depth of gaming knowledge and political capital that will be useful in navigating a path to the ballot box.

"This is an important and consequential policy issue that we have to get right for Californians, tribes and stakeholders," said Mark Macarro, tribal chairman of the Pechanga Tribe of Luiseno Indians, in a statement. "Pechanga looks forward to engaging in the debate to determine the best path forward."



Assemblyman Adam Gray and Senator Bill Dodd are developing a bill that would legalize sports betting in California in a "holistic" manner that gives a piece of the pie to all gambling interests



Cody Martinez, chairman of the Sycuan Band of the Kumeyaay Nation, says the tribal ballot initiative is designed to eliminate illegal sports betting and protect consumers

Shareholders vs. Stakeholders

For industry forces like mobile sports betting operators, card clubs, sports leagues and media companies, that debate is high-stakes. Among the restrictions, SWRUGEA doesn't permit off-premise mobile sports betting, and completely leaves out card clubs from being able to host brick-and-mortar sportsbooks. It also effectively limits the involvement of traditional providers of mobile sports betting solutions.

Card clubs have come under scrutiny in recent years for being complicit in money laundering and other criminal activity. Regulators agree: less than a month after tribes announced SWRUGEA, the Bureau of Gambling Control proposed a new set of rules designed to bolster enforcement of existing rules against house-banked card games across the state's 72 card clubs.

During that same week in December 2019, state and federal regulators levied a combined \$5.9 million penalty to California's second-largest card club, Hawaiian Gardens Casino.

California Attorney General Xavier Becerra lauded the \$3.1 million penalty as the state Bureau of Gambling Control's largest settlement. The casino was also fined \$2.8 million by the Financial Crimes Enforcement Network (FinCEN) for misleading regulators and failing to comply with decades-old anti-money laundering laws.

Reiterating his official statement, Macarro said Californians "should have the choice to participate in sports wagering at highly regulated, safe and experienced gaming locations."

Slow and Steady

With regard to SWRUGEA, "This well-designed measure ensures responsible sports wagering by introducing important safeguards that protect consumers," says Tribal Chairman Cody Martinez of the Sycuan Band of the Kumeyaay Nation. "For example, it requires people to be physically present when placing bets, forbids marketing of sports wagering to minors under 21, and prohibits wagering on high school games and college games with California teams."

The tribally led initiative came to the forefront just five months after Assemblyman Adam Gray proposed a bill in June 2019. The bill, Assembly Constitutional Amendment 16 (ACA 16), co-authored by state Senator Bill Dodd, seeks to broadly legalize and regulate sports betting in the state.

ACA 16 lacked majority and tribal support, which stalled the process until late last year, when in response to SWRUGEA, which left out the card clubs, Senator Dodd vowed to continue: "The card rooms that participate

in gambling in the state of California have a huge economic impact on many areas of the state, particularly cities in Southern California. What I'm charged with is finding the right constitutional amendment that serves Californians well in this area of sports betting and also generates the most money possible for education going forward."

Steve Stallings, then-chairman of the California Nations Indian Gaming Association (CNIGA), the state's leading association of gaming tribes in California, rebuked ACA 16 in a statement: "In short, CNIGA does not support any expansion of gaming in California, including sports betting, until the for-profit, commercial card rooms stop their illegal practices, including constitutionally prohibited banked games."

Since then, CNIGA has continued to renew, gain and harness tribal support from across the state. In addition to newly elected leadership, including the naming of Chairman James Siva of the Morongo tribe, Pechanga has rejoined the association after a seven-year hiatus from the organization.

Timeline In Focus

Sources close to the matter confirmed that official language for SWRUGEA would be finalized later this month (January 2020) to allow for tribes to begin collecting the 997,139 signatures needed to qualify for the ballot in November.

Around that same time, state legislators will begin holding hearings to discuss ACA 16. Once hearings are held and the language for ACA 16 is agreed upon, the bill needs approval from two-thirds of both legislative chambers at least 180 days before the election (May 7).

For SWRUGEA, that journey requires closer to 1.5 million signatures to account for errors and disqualifications during that same period.

Different Paths, Same Destination

At the end of the day, both proposals seek to bring sports betting to California. The tribes are taking a traditional approach to an industry that has for centuries been considered a high-risk and sinful practice.

By rolling out sports betting through a safe and systematic approach, tribes are protecting a lifetime of hard work spent safeguarding the integrity of gaming in California with the ultimate goal of nation-building through promoting tribal self-sufficiency, economic development and perpetually strong tribal governments.

Dueling Referendums

A bill before the California legislature would set up a referendum on sports betting that would threaten tribal sovereignty

Several weeks after a consortium of 18 California gaming tribes introduced a campaign to amend the constitution to legalize sportsbooks for tribes and racetracks but not card clubs, two legislators plan hearings on a bill, ACA 16, with a much wider approach.

Question is, do the legislators, Rep. Adam Gray and Senator Bill Dodd, have the political clout to oppose the tribes?

At this juncture, their measure is a shell bill that needs to be filled out. Gray is the chairman of the Assembly's Governmental Organization Committee, and his counterpart in the Senate is Dodd. Starting in January, they plan to hold many hearings before a final bill emerges, probably next June.

In order to be placed on the November ballot, ACA 16 would require a two-thirds yes vote from both chambers of the legislature.

Dodd said he was surprised by the tribal ballot initiative.

"They obviously have firm beliefs on what they see should be happening in this area, and that's their right," Dodd told LegalSportsReport.com. "But I represent all the people in the state of California, not just the tribes. And I think our approach to this should be more holistic."

Dodd said the tribes' initiative is meant to benefit only them and the racetracks, and doesn't address what many believe is the only lucrative form of sportsbook, online. New Jersey, for example, gets 80 percent of all sports betting revenue from mobile wagering.

"When you look at all gaming interests in California—FanDuel, DraftKings, sports teams, card rooms—so many people were left out of this initiative," Dodd said. "We've got to consider them as well as the racetracks and tribes."

In an exclusive interview with *GGB* on the final day of his eight years as president of California Nations Indian Gaming Association (CNIGA), Steve Stallings com-



"State government sees expansion as a panacea to solve all problems—we know that going in. Most states realize the taxation on sports betting is not going to solve any budgetary issues. We are concerned about consumer protection and underage gaming."

—Steve Stallings, former President, California Nations Indian Gaming Association (CNIGA)

mented on Dodd's proposal. Stallings is also a council member of the Rincon Band of Luiseño Indians, a member of the 18-member consortium.

"We think any expansion ought to be methodical and well-tested," said Stallings. "Dodd said our initiative doesn't include online. That doesn't mean it can't later be amended. California voters gave us a mandate to keep gaming on reservations. With this, we do that, but help some racetracks that need some shoring up to stay competitive."

Asked why the measure elbows out card clubs, Stallings said, "The state has not enforced the simple statute that 21 is not allowed in card clubs. Why would you expand gaming in facilities that are conducting illegal gaming?"

He further addressed Dodd's concerns: "Like with internet poker and any gaming expansion, state government sees expansion as a panacea to solve all problems—we know that going in. Most states realize the taxation on sports betting is not going to solve any budgetary issues. We are concerned about consumer protection and un-

derage gaming."

Noting that Dodd's bill would take two-thirds vote in the legislature, he added, "Tribes are not supportive of that process."

"I think we hear a lot of numbers about international sports betting that's not true of the domestic market, and it does need to have some regulatory controls to make it competitive for everyone," Stallings continued. "We are concerned that the game be conducted properly. It's a low-margin business, but for tribes, it is a way to drive business. We know that most of that money in terms of revenue even for online betting is around major sporting events such as the Super Bowl and the Final Four, and those things drive traffic. Everyone is going to come up with economic impact; I don't think previous attempts have proven those numbers outright."

Stallings said he believes the expansion of gaming in the Golden State should follow an incremental path. "Online is a major expansion of gaming and that's more of an issue for tribes. Tribes feel this is a more practical way to incremental sports betting over time."
—David Ross

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Manila, the capital of the Philippines

Bouncing POGOs

Have the **Philippines** become the online gaming capital of Asia?

By Brendan D. Bussmann and Jack Gallaway

Online gaming has been on the radar of mainland Chinese authorities over the last six months, as they seek to stop online operations in Asia. They are particularly focused on online gaming markets in Cambodia and the Philippines, which are suspected of targeting Chinese nationals.

In response to several compliance issues and concerns raised by Beijing, Cambodia has effectively shut down its online gaming operations. However, the Philippines and President Rodrigo Duterte, even after meeting with the Chinese President Xi Jinping, decided to keep its online gaming operations open. The market is thriving throughout the Philippines and looks to continue to grow under the regulatory structure of the Philippine Amusement and Gaming Corp. (PAGCOR).

In 2016, online gaming in the Philippines was officially moved under the auspices of PAGCOR, creating a new mode of licensure



Philippine President Rodrigo Duterte (l.) refused to honor the request from Chinese President Xi Jinping to shut down online gaming companies targeting Chinese citizens



**PAGCOR Chairman
Andrea Domingo says
POGOs generated PHP8
billion (US\$157 million)
in taxes in 2019**

for Philippine Offshore Gaming Operators (POGOs). Since then, the online gaming market has continued to grow at what some may call exponential rates. POGOs primarily provide table games, especially baccarat, that are streamed from live dealer studios, with one game serving as many as 500 online players.

While this form of gaming is available only to players located outside the Philippines, the POGO operations themselves are predominantly centered in the Makati City area of Manila, and are rapid expanding into other parts of the city.

There are currently 60 POGO licensees and more than 219 accredited service providers. These service providers allow for various functions of a POGO operation and fall into one of six categories:

- Licensed studio and streaming providers
- Gaming software platform providers
- IT support services
- Strategic support providers
- Customer relations service providers
- Business process outsourcing (BPO) companies

Each accredited service provider must be sponsored by an existing POGO licensee but is permitted to work for multiple licensees provided that it has permission from the initial sponsor.

Employment in the POGO market is significant; PAGCOR acknowledges that a minimum of 130,000 foreign workers are employed in the industry. Strategic support providers and customer relations service providers account for the majority of foreign workers and the bulk of POGO-related operations. Strategic support providers operate the back-office support of POGO operations to ensure they are running smoothly. Customer relations service providers serve as the face of the industry through the recruitment of new players, communication with existing players, and addressing any payment/credit issues that may exist among other services provided.

PAGCOR Chairwoman Andrea Domingo estimated earlier this year that POGOs would generate PHP8 billion (US\$157 million) in gaming tax revenues in 2019 (from 2016 to 2018, PAGCOR took in PHP12 billion, or US\$236 million, indicating rapid growth in the industry). How-

In 2016, online gaming in the Philippines was officially moved under the auspices of PAGCOR, creating a new mode of licensure for Philippine Offshore Gaming Operators (POGOs). Since then, the online gaming market has continued to grow at what some may call exponential rates. POGOs primarily provide table games, especially baccarat, that are streamed from live dealer studios, with one game serving as many as 500 online players.

ever, industry experts believe the numbers to be higher as a result of non-compliant POGO operators that have not reported revenues or paid taxes.

Several POGO operators were temporarily shut down during the past six months until settling previously unpaid corporate and income taxes or agreeing to a payment structure to cover the deficit in a reasonable time frame. One of these operations was a larger accredited service provider that employed more than 8,000 employees. The front doors of its operation were padlocked until the taxes were paid.

Impact on Other Industries

POGO operations have had a significant impact on the real estate industry—both commercial and residential. In terms of commercial development, the growth of commercial office space in Manila is primarily attributed to the growing size and num-

ber of POGO service providers. These operations include everything from live-dealer operations to customer support services.

In fact, the space constraints in the market are so significant that new development cannot come quick enough to handle this growing segment of the economy. POGO operators are literally asking brick-and-mortar casino operators to lease out a portion of their existing parking garages to accommodate POGO operations.

The residential market also has seen an impact with the influx of foreign workers, some of whom are in the Philippines on legal work visas while others have extended their tourism visas to stay and work. POGO operators lease out facilities to house multiple workers within a residence, whether in neighborhood housing or in condos within high-rise buildings. With multiple foreign workers residing within small condos interspersed among single-family residences occupied by local families, the impact on the community structure within these neighborhoods has been significant. Estimates have been floated in the range of hundreds of thousands of Chinese nationals that are largely filling this influx in real estate.

One of the sectors most hurt by the rise of POGOs has been the BPO industry, which is critical to the overall economy of the Philippines. This segment has seen rising rents and a lack of available space to expand their current operations.

In addition to increasing pressure from China, POGOs are now coming under scrutiny from the inside. This stems from two different areas of the government: the bureaucracy and the political class.

“The POGO industry has completely changed the direction of the real estate market in the Philippines. The market was heading towards over-supply, and now it’s the complete opposite,” said Morgan McGilvray with Santos Knight Frank. “POGOs tend to pay above-market rents. This makes them attractive to developers, especially when leasing out large amounts of space.”

Focus from the Inside

In addition to increasing pressure from China, POGOs are now coming under scrutiny from the inside. This stems from two different areas of the government: the bureaucracy and the political class.

The focus has been on a host of issues ranging from tax revenue to accusations of human trafficking, prostitution, money laundering, and other unscrupulous behavior. The bureaucracy has fallen under more scrutiny despite several different government departments fighting to bring legitimacy to the market. These include the Central Bank, the Department of Labor and Employment (DOLE) and the Bureau of Internal Revenue (BIR), all of which play a role in operations and oversight of POGOs.

The Central Bank of the Philippines continues to focus on financial compliance issues including anti-money laundering (AML) efforts. With POGO operations attracting players from jurisdictions across Asia, the Central Bank wants to ensure compliance with all financial regulations including the detection of any money laundering activities. It continues to refine these procedures to offer the same standards and best practices across all online operations in the Philippines.

DOLE handles all the labor and employment issues. In order to begin working at a POGO, a worker must obtain the right visa and paperwork to become eligible as a foreign worker in the Philippines. Through this process, DOLE now faces two problems: one is a backlog resulting from the influx of foreign workers, and the other is the number of operations that have dodged the process in order to sustain the high level of growth in their operations.

The Bureau of Immigration has started to increase its level of enforcement, as some legislators have claimed that there are as many as 400,000 to 800,000 foreign workers, mainly Chinese nationals, employed by these operations.

The BIR has largely been focused on ensuring that revenue is generated legitimately and properly. While PAGCOR is focused on the revenue from gaming, BIR is focused on corporate taxes, income taxes, and

other related taxes. As previously mentioned, BIR has already suspended or shut down several providers for tax evasion.

The political class presents more of a challenge as it seeks to reign in the market and recoup what it believes are additional tax revenue opportunities, beyond that which remains unpaid. On one hand, the political class seeks a crackdown on illicit activities that have been reported with relation to POGOs. There’s also a tendency among the political class to over-tax a market as revenues increase.

As of the writing of this article, several proposals have been submitted to either increase the tax rate on gaming revenue or to increase licensing fees. One must realize this can often have adverse effects on the market as the political class bites the hand that feeds them.

The Future of POGOs

The Philippine gaming market overall has always garnered the attention of the global gaming industry, especially with significant integrated resort development over the past several years. The focus is now two-fold as online operations are both a revenue driver and a source of controversy.

POGOs do not appear to be going away anytime soon. While they have faced their challenges from both internal and external sources over the last several months, this is an industry that’s just starting to grow and build on the growing demand for gaming throughout Asia.

But the Philippines still must overcome several challenges in order to become a respected online gaming market. The balance is delicate between the bureaucracy that is tackling internal challenges and the political class that has the potential to kill the golden goose.

If done right, an online gaming market can compete effectively and bring in new customers while also driving patrons to land-based operations. Although the large Philippine integrated resort licensees do not hold POGO licenses, many junket operators in the country are tied to POGO service providers, offering a bridge between the land-based and online markets. That said, junket operations are already facing scrutiny from the Chinese government on their own, and this bridge may not be so stable.

Either way, the Philippines must be closely watched as it continues to develop and potentially stake its claim as an online gaming capital in Asia. The biggest concern that remains should that not occur would be what happens if POGOs were to go away.

Brendan D. Bussmann is a partner and director of government affairs with Global Market Advisors (GMA). Jack Galloway is an analyst with GMA.

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Stephanie A. Bryan became part of her Tribe's history in 2014 when she was elected the first woman to serve as Tribal Chair and CEO for the Poarch Band of Creek Indians. Under her leadership, Wind Creek Hospitality has grown to include multiple properties across the country and internationally with resort destinations such as Wind Creek Bethlehem and Wind Creek Aruba.



Congratulations. from Alabama to Aruba!

STEPHANIE A. BRYAN

Named one of *GGB Magazine's* 25 People to Watch for 2020



DREAM TEAM

Introducing the

25

People to Watch for 2020

In the 18 years that *GGB* has been producing “25 People to Watch” in our January issue, there rarely has been a collection of individuals more suitable to watch than those for 2020. In what may be a watershed year for gaming, 2020 will see further expansion of sports betting in the U.S., competitive market evolution, the finalization of the Eldorado Resorts purchase of Caesars Entertainment and the after-effects, more attention paid to responsible gaming and its ramifications, and rapidly advancing gaming technology. The honorees this year will have significant impacts on all of the above.

Nominations for the 25 People to Watch are made throughout the year and submitted to *GGB*'s Editorial Advisory Board, who make the final determinations.

This year, a record number of women were included—11 of the 25 names—reflecting the growing importance that women are achieving in the gaming industry.

Looking back on the 18 years of People to Watch, it's important to understand just how influential the people profiled in this feature have become. Just in year one, 2003, there were some impressive profiles: Peter

Carlino, the CEO of Penn National Gaming, who went on to rock the industry by introducing the REIT formula with Gaming & Leisure Properties, Inc.; Linda Chen, who operates the Macau properties for Wynn Resorts; Mark Brown, then a Trump casino executive, now a major executive in Asia. The next year wasn't too shabby either with Gavin Isaacs, who has become the head of several major companies, and Valerie Spicer, one of tribal gaming's leading women. Later, Pansy Ho, Dick Haddrill, Mark Macarro, Bobby Baldwin, Bill Paulos, Ron Allen, Bobby Soper, Larry Woolf, Tony Marnell, Jim Allen, Keith Smith, Kazuo Okada, John Acres, Andrew Pascal, John Connelly, Francis Lui, Andrew MacDonald, Stanley Crooks, Tim Wilmott, Ramesh Srinivasan, Anthony Sanfilippo, Cath Burns, Jason Giles, Stephen Crosby, Rob Goldstein, Anna Sainsbury, Matt Davey, Paul Steelman, Ed Tracy, Marco Sala, David Lopez, Cody Martinez, Jay Snowden, Simon Thomas, Russell Sanna, Mark BIRTHA, Jeff Hamilton, Kristian Nylén and many others have graced these pages, proving that these 25 people each year are the movers and shakers.

So keep an eye on this group of 25 people. More likely than not, their influence will change the gaming industry.

—Roger Gros

For the Next Seven Generations

Stephanie Bryan, Tribal Chairwoman and CEO, Poarch Band of Creek Indians

As a child on an Indian reservation in the Deep South, Stephanie Bryan spent untold hours at work in the fields, watering crops, pulling weeds, then delivering baskets of vegetables to community elders. Their gratitude for the simple harvest remains vivid in her memory.

Like many other tribes, the Poarch Band of Creek Indians (PCI), who occupied much of Georgia and Alabama, “endured poverty, discrimination and other significant challenges,” says Bryan. “But we were resilient and overcame generational poverty to emerge strong and successful.”

Today, as tribal chairwoman and CEO of the Poarch Band, Bryan oversees a 3,000-member tribe with a growing casino empire, multiple diversified business ventures, and considerable political influence. In 2019, the PCI Gaming Authority offered its home state a multimillion-dollar payout and \$350 million per year in exchange for a monopoly on gaming in Alabama and the right to offer Class III games. According to Bryan, that deal, if approved, could generate more than \$1 billion in revenues its first year alone; she calls it “the economic stimulus that our state needs and deserves.”



Photo Credit: Jon Cook, High 5 Productions

Creek Rising

The tribe's economic ascent began in August 1984, when, after years of struggle, PCI finally won federal recognition from the U.S. government, giving it the right to operate a gaming facility.

"During that time, our tribal elders would sell chicken plates to raise money for leaders like Chief Calvin McGhee to travel to Washington to petition the government," recalls Bryan. "That was a huge battle for us, but one that brought our community together with a common goal"—to create an industry that would lift its people out of poverty and sustain them across generations.

In April 1985, the Poarch Band opened a 1,500-seat bingo hall in rural Escambia County. "It enabled us to provide our citizens with jobs, public safety, better health care, and decent housing," says Bryan. "From that one meager establishment, our gaming and business footprints have expanded far beyond what any of our elders could have imagined."

The list is long indeed, and getting longer. PCI now operates casinos in Atmore, Wetumpka and Montgomery, Alabama; the Wa She Shu Casino in Gardnerville, Nevada; the Renaissance Aruba and Renaissance Curacao resorts in the Caribbean; as well as racetracks in Alabama and Florida.

In 2018, PCI made headlines with its deal to buy Sands Bethlehem in

Pennsylvania's Rust Belt (now Wind Creek Bethlehem) for \$1.3 billion. Bryan calls the acquisition "a remarkable milestone in our success story."

"In 2015, we had set some aggressive long-term goals for our businesses and tribal government," she notes. "Wind Creek Bethlehem was part of that vision-casting session and marks an unprecedented investment opportunity for the Poarch Band." PCI is now looking at the Illinois gaming market, and plans to develop a \$275 million casino resort in Homewood, a suburb of Chicago.

The Poarch Band isn't stopping there, says Bryan. "Today, we have over 20 businesses, and continue to look at ways to diversify and offer employment opportunities in various locations. Some of our businesses include OWA, a development in nearby Foley, Alabama that includes an amusement park with restaurants and other amenities, a sports field complex and a hotel. We've also partnered with a developer to build and operate hotels across the southeastern region of the United States. We own a burgeoning aviation business based in Huntsville, Alabama, and a media firm there, as well. And we have farming interests and a metal works business that does work for the aeronautics industry. We believe it's important to create jobs across sectors."

From Strength to Strength

Needless to say, Bryan's schedule is often "crazy-busy," but she calls it "a good busy."

"I tell my children all the time, life is about balance. My work as a tribal leader and CEO is challenging and stressful, but the reward is much greater because I am serving, helping people and giving back. That's what motivates me every day."

Among the highlights of her professional life was meeting President Barack Obama.

"The first time I met him, I actually teared up; having grown up in a poverty-stricken community and being able to meet the president of the United States—it was a history-making moment for me," she says.

She said as much to the president, who replied, "We're both making history, because I never thought I would be president."

Once a single mother who lived in tribal housing, worked three jobs while attending college, then opened a state-licensed day care center so she could work from home, Bryan thanks her mother and grandmother for their unstinting support and love.

"Without them helping me," she says, "I'm not sure where life would have taken me."

These days, in her rare spare time, the chairwoman enjoys reading, yoga and being with her family, kids Keisha, Brannon, and Niki, and husband Keith, whom she calls "my biggest cheerleader."

Bryan acknowledges that gaming has "completely changed the quality of life for not only our tribal members, but for many others as well," and helped the tribal economy grow by more than 100 percent. "Our elders are taken care of, our youth have educational opportunities, our people have great health care available to them, and we are so thankful for that."

Yet she envisions a future "where we are no longer attacked because we are Native American and a 'gaming tribe.' We've taken the opportunities available to us and sought prosperity and self-determination. We've been able to positively impact many other lives as well—around 9,000—through job opportunities. We're good neighbors in the communities we do business in, and we believe in leaving things better than how we found them. That's something that I'm personally very proud of."

Vision-casting herself, Bryan says, "The future I see for the tribe that I love so much is one in which our people are grounded in love for others, where we use our resources to make the world a better place, and where our language, culture and history are continuously shared and passed down in perpetuity.

"Our goal is to provide sustainable growth for the next seven generations."

—Marjorie Preston

World Traveler

Justin Carter • *General Manager,
Hollywood Casino Toledo*

Justin Carter is general manager of Penn National Gaming's Hollywood Casino Toledo and oversees the Hollywood Gaming at Mahoning Valley Race Course. At 42, Carter is having a blast. When he talks on the phone, you feel the smile.

Carter fell into gaming. With a chemistry and biology degree, "I fancied myself a pretty darn good scientist and went to work as a research chemist," he recalls. He became a supervisor and attended business school, where Caesars recruited him.

"I've been very fortunate not to say no at the wrong time," he says. "As opportunities provided themselves, I jumped into it. That has paid dividends and sent me to a lot of different places."

When he met the executive team at the Caesars St. Louis property, he says, "The guys were having such a great time. I thought, 'I don't know what these guys are doing, but I need some of that.' You could go to work every day with a smile on your face."

He started as a president's associate, a storied position in the Harrah's/Caesars organization.

"When I look back, working as a front-line team member, slot attendant, paying customer jackpots, answering calls, dealing with irate customers; I remember those moments," he says. "That helped shape me as a leader. I always think about the downstream effect of my decisions; how will it affect those having to follow those rules?"

His first assignment was in the Bahamas as part of Caesars' pre-opening team. The project never happened because of the 2008 recession.

"This is where it gets really fun!" he says. He went to Caesars Atlantic City as slot performance manager, then to Harrah's Kansas City as director of continuous improvement.

He was later tapped by Michael Silberling, who ran Caesars' international operations at that time: "He asked how I would like to move to South Africa's Emerald Resort and Casino outside of Johannesburg, as operations executive, in charge of a casino, safari park, luxury lodge, golf, all on 800 acres."

Two years later—back in the U.S. he was almost immediately offered the Caesars Empire Casino in London. "I said, 'OK, no problem!' When he thought he was coming home from there, they gave him the Manchester235. Later, the Nottingham and Glasgow casinos were added to his job.

He returned in 2014 as assistant manager of the new Horseshoe Cincinnati, working for Jay Snowden. When Snowden joined Penn National—eventually becoming CEO—"I thought so highly of him that I moved over. I can't say enough how good that has been for my career," he says.

Since then he has managed the Hollywood Casino & Inn at Charlestown Races and Hollywood Casino in Tunica, Mississippi. When Penn acquired two more casinos, he managed all three.

Today, at the Hollywood Casino Toledo, he says, "We pride ourselves on the fun, food and entertainment. We do a great job creating an environment that if you come here you will have a great time. We routinely have highest scores in customer service. You meet extremely friendly people whose first port of call is making sure you have a great time. Our team members love being here."

—David Ross



An Amazing Run

Lorrie Bamford • *Vice President of
Corporate Compliance, General Counsel,
Gaming Capital Group*

When Oklahoma gaming tribes want to build or renovate a property or invest in new equipment, they frequently turn to Gaming Capital Group (GCG). In addition to funding, the Tulsa-based firm also provides informed financial advice that helps clients flourish in an ever-changing financial environment.

GCG's breadth of services makes it "very rare" if relatively new, according to Lorrie Bamford, vice president of corporate compliance and general counsel.

"GCG was formed 12 years ago to help the Chickasaw build Riverwind Casino" in Norman, Oklahoma, Bamford says. "That one-off project was so wildly successful, the tribe trusted our leadership and had us partner with them in everything. We're now in over 26 jurisdictions with more than \$1 billion in capital financing. It's been an amazing run."

Bamford manages the legal minutiae of the multi-pronged business, ensuring regulatory compliance in all 26 jurisdictions, each with its own regulations, rules and procedures. She not only provides legal counsel but shapes policy, oversees education and training, manages prize claims, stays on top of a small mountain of constantly regenerating compliance reports, and keeps abreast of any legal or contractual matter of importance to the firm and its clients.

And the role suits her, she says. "You have to enjoy research, and finding the answers in different codes of law. You have to enjoy having 26 different laws applying to different situations and finding a solution," she says. "You have to be a problem-solver."

Though she's often knee-deep in paperwork (or the digital equivalent), Bamford says people skills are also indispensable to her job. "It's essential

“You have to be a problem-solver. It’s essential to be able to talk to people and understand their needs.”

to be able to talk to people and understand their needs.”

One of 11 kids, Bamford grew up in poverty in Dallas, Texas, but always had her eyes on the skies. “I knew from an early age I wanted to be a lawyer, but I never expected to go into gaming, especially being from Texas,” where most forms of gaming are illegal, she says. She got her introduction after moving to Oklahoma for law school, and joined GCG in 2012, spurred on by a colleague who knew her work in contract law.

“I said, ‘I don’t know anything about gaming or Native American law.’ She said, ‘You’re smart, you’ll figure it out.’ I figured, ‘Why not? Let’s try and see what happens.’ I’m so glad I took that chance. I was naïve at first, and had no idea of the sophistication of these operations.”

Bamford made it a point to meet regulators and gaming commissioners, “especially those I met through Global Gaming Women. What a fantastic organization! I got plugged in with them as soon as I could, which enabled me to see women in leadership in the industry.” She cites GCG President Sherri Lance, CEO Rolan Miller and CFO Matthew Weber for supporting her profes-

sional ascent.

“Because of them, I’ve had this success,” she says.

In addition to being a respected industry professional and justice of the Supreme Court for Oklahoma’s Delaware Nation, Bamford is also a fitness star. “Ten years ago, I weighed 330 pounds. My doctor told me if I didn’t change I wouldn’t see my kids (Aaron and Sarah) grow up. So I started running.” A super-fit Bamford is now training for her third marathon, and has also become a motivational speaker. “With my background of poverty,” she says, “I like to help people realize they hold the pen to write their own story.”

She had one problem with her nickname: Hellcat. “I use it in my motivational speaking and smoking cessation coaching: how we all have an inner hellcat. Facebook made me take it down, because they said it wasn’t my legal middle name.

“Well, I’m a lawyer. I filed a petition with the Logan County District Court and had my middle name changed to Hellcat. Facebook put it back.”

—Marjorie Preston



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CATCH THE VISION IN 2020

Accidental Inspiration

Ellen Whittemore • Executive Vice President and General Counsel, Wynn Resorts

Becoming a gaming attorney wasn't the plan for Ellen Whittemore. As a young attorney fresh out of law school, she took a job with the Attorney General's Office in Nevada.

"I was in the Civil Division at the time and I was representing occupational licensing board and the board of medical examiners that granted doctors licenses," Whittemore explains. "It was a very interesting position. The chief of the Civil Division had resigned and that position was open. I asked (Attorney General) Brian McKay if he was going to appoint me and he told me he was going to transfer me to gaming. I was disappointed, but he said I'd thank him later. And I have. Many times."

From the AG's office, Whittemore landed at Lionel Sawyer & Collins, at the time the most prestigious law firm in Nevada.

"My experience at LSC was exceptional for the quality of clients that it attracted," she says. "As an attorney you want to have the best clients and ones that have interesting situations so you can develop professionally and really help your clients."

Whittemore says LSC represented many "interesting" clients including the Detroit City Council when gaming was being contemplated there; MGM Resorts on their joint venture with Pansy Ho in Macau; and some in-depth legal work with manufacturing companies like IGT and Scientific Games.

After leaving LSC, Whittemore started her own firm with MGM as the largest client. Two years ago, she joined Brownstein Hyatt Farber Schreck.

"They had been courting me for a couple of years," she says. "It's a great law firm and I thought I had a home there."

But that was before Wynn Resorts President and CEO Matt Maddox called.

"Matt explained to me that the company was at a point where it needed a person with gaming regulatory experience as its general counsel," Whittemore says.

And the regulatory body that was most concerning for Wynn was the Massachusetts Gaming Commission.

"The regulators were very disappointed in the company at that time," she explains. "We have a longstanding reputation in Nevada and regulators there appreciated the changes that we've made and



were continuing to make. In Massachusetts, we weren't very well known. It was a different environment.

"But I approached it the same way I approach any regulatory board. You have to give them full transparency. They need to know everything about a company and everything about the individuals within that company. I told them at the very first meeting that I will always tell them what's going on—good, bad or indifferent. The only way you can be successful in this position is to understand that transparency is the only approach that will work."

Whittemore says she'll take the same approach in Japan where Wynn Resorts is bidding for one of the casino licenses that will be issued within the next couple of years.

As one of the first women to practice gaming law in the state of Nevada, Whittemore and Wynn Resorts play an active role in the promotion of the Global Gaming Women organization.

"It's great to be able to bring young women in the industry and give them the opportunity to get together with like-minded individuals and the power to show that we can do it and let's help each other get there. The power within this organization is just incredible," says Whittemore.

—Roger Gros

Movement in Macau

Ho Iat-seng • Macau Chief Executive



Politics in any gaming jurisdiction is a tricky thing, but in Macau it's got an entirely different layer of complexity: the Chinese central government.

When the two terms of former chief executive Fernando Chui Sai On were concluded there wasn't much debate. The anointed candidate to replace him was Ho Iat-seng. A former president of the legislative assembly, Ho was a stealth candidate. Though his name had been mentioned in the past as a possible chief executive, his low-key approach kept that speculation to a minimum.

But Ho seemed to be the logical choice. He was from a prominent Macau family—not the Stanley Ho family but Ho Tin, who moved from Zhejiang province to found an industrial company in Macau in 1956.

Ho Iat-seng was born in Macau but never lost connections to the mainland—and therefore the power of the central government. He studied at Zhejiang University and was a member of the Chinese People's Political Consultative Conference in Zhejiang province for almost 20 years. Ho also served as a member of the Standing Committee of the National People's Congress.

Ho will inherit a challenging climate in Macau, both business and social.

On the business side, a slump in the Macau casino industry is causing consternation among investors if not immediately the operators. A trade war between China and the United States clearly is having an impact, as are stricter controls on the flow of money from the mainland into the gambling enclave.

Also on the horizon is the looming renewal of the Macau gaming concessions, scheduled to expire in 2022. Up until now, the government has been very tight-lipped about what the plans are,

The Tribal Life

Conrad Granito • General Manager,
Muckleshoot Casino

Passionate and pragmatic, Conrad Granito wins everywhere he goes.

The general manager of Muckleshoot Casino in Auburn, Washington, the largest tribal gaming operation in the Pacific Northwest, has developed strong economic foundations for tribal nations around the country for three decades.

Now he builds atop a foundation.

Granito leads a multimillion-dollar transformation of the locals casino into an anticipated four-star destination resort set for a full unveiling in 2021. The signature project will add a 20,000-square-foot event center and 400-room luxury hotel as well as expanded gaming and dining options, among other amenities.

This will be the latest example of a formula that has worked at Granito's properties.

"What we have done at all the places, including here, is understanding our place in the market," Granito says. "You don't have to be everything to everybody. To use a retail analogy, there are some properties in this area that would be like a Nieman Marcus. Some would resemble a Macy's. We are the Target in that reference and we market to that audience. We listen to our customers and give them what they are looking for.

"Instead of having 10,000 people show up when I only have 4,000 betting terminals for them, it's better to have the right 4,000 people showing up. You have to identify your market and make the right re-invest."

Prior to assuming this role in June 2014, Granito served as general manager of Coshatta Casino Resort in Kinder, Louisiana. During his five-year tenure, he directed the significant expansion of the property's footprint while increasing sustainability and profitability. Granito also helped Santa Ana Star Casino near Albuquerque, New Mexico, and Sky Ute Casino Resort in southwest Colorado achieve record results.

While revenue tells one story, human interaction unveils another, keeping him grounded.

"One of the reasons I love this business is because of what it does for the tribes," he says. "All the advancements in the elder care, education and infrastructure, etc., has made many of the them sustainable communities.

"When we were transforming Isleta from a bingo hall to a full-fledged casino, an elderly woman I had seen often on the gaming floor motions me over," he says. "She puts her hand on my arm and says 'thank you for making us proud of who we are here.' Oh my God, when you consider what gaming has done for people. I still remember the day she said that."

Granito also has served as president and chief operating officer of GameTech International, a global gaming technology company. He's also lent his tribal expertise as a consultant on more than 58 gaming projects, ranging from feasibility studies to the establishing of internal controls.

—Dave Bontempo

“One of the reasons I love this business is because of what it does for the tribes. All the advancements in the elder care, education and infrastructure, etc., has made many of the them sustainable communities.



except for extending the concessions of SJM and MGM China to ensure that all concessions expire at the same time.

"It's one of the biggest and most complex issues the chief executive will have to deal with, because there are many stakeholders involved,"

Glenn McCartney, associate dean of the Faculty of Business Administration at the University of Macau, told the *South China Morning Post*. "He will have to determine what sort of landscape he wants. But, perhaps most importantly, he will have to guarantee that this re-tendering process won't bring any instability."

Socially, the Macau natives are restless. While Macau has avoided the freedom protests occurring across the bay in Hong Kong, young people in Macau want more opportunity and a more diverse economic system—one not largely dependent upon the casino industry. Ho also needs to address a housing shortage in a city where land is at a premium.

The early days of Ho's administration have been eye-opening. He retained Paulo Martins Chan as the leader of the Macau regulator, the Gaming Inspection and Coordination Bureau (DICJ). The stability that Chan has brought to the regulatory process is recognized by the industry.

But he dismissed Lionel Leong, who headed up the SAR's second most important department, the Economy and Finance Ministry. Ho appointed career bureaucrat Lei Wai Nong to succeed Leong, who was a successful businessman prior to his public service. The move surprised veteran Macau observers.

So the reign of Ho Iat-seng is likely to be more stormy than any of his four predecessors since the handover of Macau was completed in 1999. But stability is likely to be his signature as Macau enters the 2020s.

—Patrick Roberts

On the Money

Colleen Birch • Senior Vice President of Revenue Generation, The Cosmopolitan of Las Vegas



Revenue management in hospitality once was about as precise as throwing darts at a board. Blindfolded.

In 2001, when Colleen Birch worked the front office at Caesars Palace in Las Vegas, conversations about room prices went something like, “Oh, we would probably get another \$20—but maybe we should lower the rate,” Birch recalls. “We did it without a lot of data or measurement, and a lot of those decisions were debt-driven.”

Birch persuaded her manager to make her the property’s first-ever yield manager.

“It was my job to make better pricing decisions to yield greater revenue outcome.”

Her current position, as senior vice president of revenue generation at the Cosmopolitan, is a natural progression; she optimizes the customer mix “so that every revenue outlet—hotel, restaurants, spas, casino—sees the benefit.”

Birch’s career path was never linear, or particularly intentional. Though hospitality is part of her DNA (her mother worked in the airline industry, her father in hotels), the field didn’t quite click for her. For several years, she alternated working as a nanny in Seattle and managing a bar in Bristol Bay, Alaska—and helped to turn the place into a profitable venture for the first time.

By the time she enrolled in the Harrah Hotel College of the University of Nevada, Las Vegas in 1999, Birch’s path was clear. “You can be a revenue manager who learned the operational side,” she says. “I’m an operations person who learned the revenue function.”

Far from making seat-of-the-pants decisions, she routinely looks at the revenue picture from 90 to 120 days out, “keeping a 10,000-foot view on pricing and the demand.”

Among her role models is George Markantonis, former Caesars hotel executive and now president of the Venetian and Palazzo.

“He gave me my first shot at working at that organization. George had a genuineness as a leader, and a vested interest in all the people who worked for him.” Another is Cosmopolitan CEO Bill McBeath. “Bill is just incredibly ‘on’ all the time. He could read a 300-page P&L and find the one thing that didn’t look right,” says Birch. “I’ve learned great lessons from him.”

She now is glad to serve as a mentor herself, and was the recipient of UNLV’s John Yaskin Mentor Award in 2017. Thanks to her own circuitous route, she says, “I can tell a junior or senior, ‘It’s OK to not know what you want to do.’ No job is a bad job if you’re good at it, and it’s OK to try something and say, ‘That’s not a career or a management style for me.’”

Off the job, Birch recharges with tennis, off-roading, and mostly, travel with friends and family, including two teenagers, Gavin, 16, and Lily, 13. She says the Cosmopolitan “is like a third child.”

In December, the luxury resort will mark its 10th anniversary. Birch says 2020 “brings a fresh resurgence of the resort with exciting new restaurant offerings, beautifully renovated guest rooms and our continued commitment to delivering luxury service. We look forward to welcoming both new and returning guests to see all that’s new in the year ahead.”

—Marjorie Preston

Untangling the Web

Itsik Akiva • Chief Operations Officer, American iGaming Solutions



It’s been more than 20 years since the launch of the first online casino, and 10 years since smart devices became ubiquitous. But some gaming corporations are still struggling to migrate successfully into the online space.

In that often baffling environment, Itsik Akiva feels perfectly at home.

Akiva founded American iGaming Solutions to help online companies devise marketing and product strategies, optimize their performance and expand into new markets. The company is one of a few U.S.-based consulting firms with deep expertise in a relatively recent phenomenon, especially stateside: iGaming.

Some operators mistakenly think it’s easy to shift online, Akiva says—and that’s where their trouble begins. “It seems like a basic no-brainer, but in reality, it’s a different language and a different mindset at a different pace. Things happen at a moment’s notice. The entire cycle of operations is much faster. So the decision-making process has to be faster. The interpretation has to be faster.”

With markets opening at a rapid-fire pace, operators may act hastily “to avoid being left behind. They partner with platform providers without even knowing the market conditions or regulations. They make deals they cannot change, and a lot of things that make sense are left behind or not tackled properly.”

He likens the process to matchmaking. “You don’t just go and marry someone before you get to know them—and divorce is always expensive. If you make the wrong choice with a platform provider, switching is going to cost you money, revenue, customers and market share.”

American iGaming’s goal is to ensure that its clients start off on a firm footing, with service or platform providers that are a good match and an informed strategy. It’s basically a two-man operation: Akiva and his partner Jason “Wolf” Rosenberg. “But we have a core staff to call on for specific projects. That model allows us to be nimble and bring in expertise according to our clients’ needs.”

Akiva began his career as a marketer and political strategist in Israel, then moved to the greater Boston area to start a career in online gaming. Today, his consultancy works with small and medium-sized operators as well as giants like the Golden Nugget Casino, which runs one of the most successful online casinos in New Jersey.

His primary message is simple: look before you leap into the digital universe, and don’t venture forth without an experienced guide. “People want to engage online because that’s where the industry is going,” Akiva says, “but we will continue to preach that it should be done right from the start, with the right processes for operators and clients.”

—Marjorie Preston



SHE'S ONE OF GGB'S 25. AND SHE'S ONE OF A KIND, TOO.

Congratulations to Lori Olk for being one of Global Gaming Business's 25 People to Watch in 2020. Her leadership as Vice President of Regulatory Compliance at Konami Gaming, Inc. continues to propel the industry forward in innovation, integrity and responsibility.

www.gaming.konami.com

All Inclusive

Kim Barker Lee • Vice President of Diversity and Inclusion, IGT

As a 10th grader at Friends Seminary in New York City, Kim Barker Lee founded the organization CARE (Cultural Awareness Reaching Everyone), “the equivalent of a diversity and inclusion group focused on the experience of students of color.”

Today, that early commitment seems prophetic; in her role as vice president of diversity and inclusion for IGT, Lee is among the gaming industry’s most visible proponents of those precepts.

Born in New York’s Spanish Harlem, Lee calls herself “a reflection of that community: my mother’s side of the family is African American, and my father’s side is Puerto Rican.”

Despite growing up with limited economic means, Lee was rich in encouragement, support and shining role models.

“I never, ever heard the words, ‘You can’t.’ I always heard the words, ‘How can we help?’” she says. Her mother was the first person in the family to go to college and took her young daughter to class with her.

“More than anything else,” says Lee, “her example informed who I am as a person, and the deep respect I have for people who struggle to do things differently for themselves and their family.”

Lee went on to Yale and New York University Law School, and served as general counsel for Northstar Lottery Group, a majority-owned IGT affiliate. There she met one of her most important mentors, Connie Laverty O’Connor, then CEO of Northstar, who later continued in senior leadership roles with GTECH/IGT.

“It was my first time interacting with a woman who was a business leader at that level, and part of her philosophy was to mentor, to teach, and to sponsor. I came to IGT because of Connie; I have this role because she encouraged me to apply when she saw firsthand how diversity and inclusion informed my leadership style.”

In her current position, “I like to say I have a department of three, but the hands of 12,000 employees, many of whom are passionate and excited to do this work,” says Lee. “Our strategy has three pillars: People and Processes, Organizational Culture, and Players, Customers and Communities.



“IGT’s Global Diversity & Inclusion Council, which now comprises 25 leaders, is creating regional councils in Latin America, the Caribbean, Asia Pacific, EMEA and also in Italy. It ensures that our strategy has a global reach and that leaders, managers and employees all are engaged in embedding D&I into our work and people practices and the way we interact with our customers.”

A 2018 report by McKinsey & Company drew a bright line between diversity and performance, showing that gender, ethnic and cultural diversity in the workplace are more likely to result in above-average profits. IGT is committed to ensuring that its workforce “reflects the diversity of the global communities” it serves; CEO Marco Sala has called it “a business imperative.”

Lee says creating a culture of inclusion is “sometimes uncomfortable, but critical.”

“You probably need equal doses of patience and persistence to do this work. Moving the bar on diversity takes time, positive communication, creativity and the ability to adapt. There is no blueprint for D&I. You have to measure your progress, stick to your goals and have accountability. It also takes commitment at the top, which for IGT has led to our successes to date.”

On the home front in Rhode Island, Lee enjoys reading, knitting, jewelry-making and spending time with her husband, Maurice (Mo) Lee Sr. and 17-year-old son, Maurice Jr., who is now filling out applications for college.

Lee’s personal motto, “Lifting as we climb,” originated in the Black Women’s Club Movement of the late 19th century post-abolition era.

“I remember being one of the only African American women who was a partner at my law firm, and the only woman lawyer in negotiation sessions. As we grow,” she says, “we have a collective responsibility as leaders to bring a community of people with us, and to elevate their voices and experience.”

—Marjorie Preston

Eye on America

Ian Bradley • Chief Strategy Officer, SBTech

When the U.S. Supreme Court overturned the Professional and Amateur Sports Protection Act and its ban on sports betting in May 2018, there were many established sports-betting suppliers ready to grab a piece of the newly legal action in establishing retail and online sportsbooks in the U.S.

Some, like SBTech, were at the front of that line. SBTech, based in the Isle of Man with a network of nine global offices, has earned a bevy of industry awards for its sports betting platforms and services, which comprise complete sportsbook solutions including kiosks, payment services, casino integration and a bonus engine, in full-blown retail sportsbook setups including TV monitors, cashiers and kiosks, as well as more simple sportsbook operations and complete online sports-betting solutions.

SBTech services sportsbooks in 23 regulated markets across the world, but its most-watched moves these days are happening in the U.S., where it established a Las Vegas office as a hub to prepare for the floodgates that opened for sports betting in the U.S.

The company’s U.S. beachhead is well-established, with current clients in New Jersey including online market leader Golden Nugget, where both retail and online sportsbooks are powered by SBTech; Resorts on the online side; and Churchill Downs, through its BetAmerica brand, with a full platform of sports betting and online casino games. The company’s technology also fuels three books in Mississippi casinos.

SBTech is now poised to grow with the sports betting market in the U.S., and leading the charge will be Chief Strategy Officer Ian Bradley, whose pedigree includes not only the past three pivotal years with SBTech, but eight years with Sporting Solutions, the B2B provider of the Sporting Index that dominates more than 80 percent of the sports spread betting market.

“At Sporting Solutions, I helped build up the B2B business working with partners across the globe, including William Hill, Skybet, Tabcorp and others,” Bradley recalls. “It provided a very good entree to the B2B side of the business. Now, my role is across departments, where I am responsible for trading and risk manage-



ment, and work with the product and technology team, looking to emerging markets.”

For the coming year, Bradley will perform a balancing act between maintaining growth in SBTech’s European base—it just won the sports betting platform contracts for lotteries in Sweden and Finland—with a U.S. client base that now includes New Jersey, Mississippi, Pennsylvania, Indiana, Arkansas and Oregon. “We’re live in most all of these states, and we’ve been busy setting up the new partners and getting them live with our solutions,” Bradley says.

Growth in the U.S. has been made a bit easier, he says, thanks to industry veteran Gavin Isaacs, the former Scientific Games CEO who became non-executive chairman of SBTech a year ago. “Gavin’s brought a lot of experience and contacts, and has really helped us in the U.S. market already,” Bradley says.

The key to growth in the U.S., he notes, will be to stay on top of the sports betting market as it grows. “We’re always looking at the news around particular legislation that might be coming through,” says Bradley. “Getting early entry into the new states as they go live is very important, so we need to be on top of the technical requirements for each state, to make sure our solution is compliant and within the requirements of the legislation.”

Bradley says SBTech has a leg up in the market because the company offers what he calls the most flexible sports betting platform in the business. “We don’t just build a feature for a branch; we build it on a core level,” he says. “It’s important to understand the requirement for whatever we’re going to build, and build it flexibly enough that it can be rolled out in Europe or rolled out in the U.S.”

—Frank Legato



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Nearing the Summit

Peter Jackson • CEO, Flutter Entertainment

In an industry marked by mega-mergers, this one was among the most audacious: the October 2019 marriage of Ireland-based Flutter Entertainment, parent company of iGaming giant Paddy Power Betfair, and The Stars Group of Canada, which owns PokerStars.

When the alliance was announced, Morgan Stanley analysts said online betting revenues for the combined group would be 50 percent higher than next-in-line Bet365 and twice those of Ladbrokes Coral owner GVC, with more than 13 million customers in 100 global markets. By Flutter's own calculations, on a pro forma basis, its annual revenue would have been £3.8 billion (US\$5 billion) in 2018, making it the world's largest online betting and gaming operation in the world.

It's the Everest of online gaming deals, and at the summit is CEO Peter Jackson, who is laser-focused on the growth of sports betting in the United States. (He's said May 14 "may become a company holiday" at Flutter—referring to the date in 2018 when the U.S. Supreme Court overturned PASPA.)

Jackson has held previous roles at Worldpay, Trevelex, Banco Santander, Lloyds Banking Group and HBOS. When he assumed his current role in 2017, the company hailed his "track record of leading substantial businesses with international reach and a combination of technology and digital consumer sector expertise."

"Banking is a highly regulated, international industry with country-specific regulation which adds a number of layers of complexity to how businesses operate," he agrees. "The gambling industry is progressing down a similar path, and this experience allows us to be a strong voice in leading responsible operations across all of our jurisdictions—investing in tools and processes to ensure the protection of our customers, while building sustainable relationships with them."



Asked about Flutter's plans for the U.S., Jackson says, "We've now successfully launched our FanDuel sportsbook in six states, four online in New Jersey, Indiana, West Virginia and Pennsylvania and two retail in New York and Iowa, and we've been very encouraged by our progress to date.

"States are opening up in different ways at different speeds, based on their legislative agendas. So our goal remains to be live in as many states as we can, as quickly as we can, delivering a strong product offering to all of our customers."

It seems his confidence is warranted. In the third quarter of 2019, Flutter reported a 174 percent year-on-year increase in U.S. gaming revenues.

"This highlights the strength of our product offering and the cross-sell opportunity for both new and existing sportsbook customers," according to Jackson.

The proposed agreement, expected to be complete in the second half of 2020, "will accelerate delivery of all of our core strategic objectives," he says. "We are very excited about the international growth prospects for the combined group. The stars are aligned for the combined group."

—Edward N. Healy



Compliance Before Commerce

Lori Olk • Vice President, Regulatory Compliance, Konami Gaming

Lori Olk's typical work day can include due-diligence investigations on her company's vendors and suppliers, background investigations on company employees, researching new business, ensuring her company remains compliant for licensing in more than 300 gaming jurisdictions, serving as her company's liaison on all company and individual background investigations with each regulatory agency in those 300-plus jurisdictions, and dealing with whatever new day-to-day issues come up in any of these areas.

It's hard to imagine anyone more capable of handling all these compliance and risk-management issues for slot supplier Konami Gaming than Lori Olk, the company's vice president of regulatory compliance.

Olk took on a lot of those tasks since she was elevated to vice president last July, but the ability to handle them comes from 23 years of experience as a compliance official for slot companies going all the way back to Powerhouse Technologies, where she began as a licensing analyst in 1997, and in the same position after Powerhouse was bought by Anchor Gaming.

IGT elevated Olk to senior regulatory compliance analyst when the slot leader bought Anchor Gaming in 2001. Beginning in 2005, she served three years as regulatory compliance manager for server-based gaming pioneer Cyberview Technology, then back to IGT when it acquired Cyberview.

For nearly nine years, she has been with Konami Gaming, beginning as regulatory com-

pliance manager in 2011. She has honed and perfected her craft on her way to heading the regulatory compliance department—with all those extra vice-president duties.

Add to that an expertise in M&A. “I’ve been through three acquisition/mergers,” she says, “having dealt with and handled the dynamics of the due diligence processes and non-negotiable timelines.

“Yes, it’s a lot to manage,” Olk says, “but I’ve got a great team. We’re busy, and we’re growing, so we have to stay on top of all the new statutes, new regulations and new markets. Every day is different, and I’m happy about the challenges. I look forward to what’s to come.”

Asked the most important of all her duties, Olk names three. “First is to mitigate risks for the company,” she says. “I’m always instilling with everybody that comes on board that it’s compliance before commerce. I also feel it’s important to ensure the company can achieve its financial plan and meet its customer commitments through the continued execution of all our jurisdictional applications—and to make sure, before the business starts, that everybody who has to be licensed is licensed.

“And third, obviously, ensuring proper licensing or ongoing compliance across all jurisdictions that Konami serves.”

In 2020, those efforts will support new markets, new players and a lot of opportunity for growth of Konami Gaming, which has embarked on an effort to expand its product library and its footprint in current and new jurisdictions.

Olk says to achieve that, she will continue to surround herself with the best people. “The biggest challenge for me will be to retain the top talent in my department,” says Olk. “The gaming industry has grown by leaps and bounds. We have a lot of fierce competition out there. However, I’m very confident. Konami has a great company culture. Employee happiness means lower turnover and better company performance. When employees are loyal and companies perform better, it’s a win-win.

“I’m excited for the opportunity at Konami. There’s a lot of opportunity for growth.”

—Frank Legato



Double Down

Fawn Sharp • *President, Quinault Indian Nation and National Congress of American Indians*

Fawn Sharp, recently elected to a two-year term as president of the National Congress of American Indians (NCAI), is an outspoken advocate of her people. Not only the 3,000-member Quinault Indian Nation based in Washington state that she also leads as president but all Native Americans.

A leader who knew at an early age that she wanted to fight for her nation’s rights to self-determination and to persuade the federal government to honor its commitments to the Quinault, she recalls, “I felt I was called at this time to advance tribal self-determination. I knew at the age of 12 what treaty abrogation was.”

One of her first acts as president of NCAI, which she won with 62 percent of the vote, was to address the U.S. House Committee on Natural Resources Subcommittee for Indigenous Peoples of the United States Oversight Hearing on the “Broken Promises Report.” She urged legislators to make good on funding promises that remain unmet 16 years after the U.S. Commission on Civil Rights first brought them to the attention of Congress.

Sharp obtained her law degree from the University of Washington in 1995. She was Quinault Tribal Court associate judge as well as an administrative law tax judge for the state. She then became attorney general of the nation. Sharp was 35 when tribal elders urged to her run for public office.

She says, “I took a leave of absence as attorney general and spent time meeting and talking with elders. I ran a traditional campaign, which means I didn’t campaign.”

She was appointed by Governor Gary Locke trustee for Grays Harbor College, was a governor of the Washington State Bar Association, trustee of Washington State Bar Association Indian Law Section, vice president and founding member for the National Intertribal Tax Alliance, and director/secretary of the Quinault Nation Enterprises Board.

Her experiences as judge shaped her philosophy.

“My role as a judge helped me to understand that injustices aren’t always as they appear,” she says. “There are root causes for behaviors and injustices.”

Sharp feels she is often underestimated. “I think I still get underestimated,” she says. “When I was a young professional, I looked like I was 12. When I registered to be a judge I was mistaken for one of the judge’s kids. Even now I tend to think people underestimate me and not see me for who I am. I’ve had to overcome being taken seriously, as a young professional, as a woman and as a Native American.”

Her nation operates the Quinault Beach Resort Ocean Shores Hotel and Casino on the shores of Puget Sound. Sharp urges gaming tribes to use the leverage gaming gives them to enter the field of international diplomacy.

“I think gaming revenues could be utilized to participate in international gaming. It’s a great opportunity to engage in international trade, diplomacy and bilateral relationships with other countries,” she says.

—David Ross

The Golden Rule

Sandra Douglass Morgan •

Chairwoman, Nevada Gaming Control Board

Every chairman or chairwoman (there have only been two) of the Nevada Gaming Control Board has reaffirmed the status of Nevada regulations as the “gold standard” for the gaming industry. And that hasn’t changed since Sandra Douglass Morgan took the reins as the second consecutive female chief of the board.

Morgan invoked the “gold standard” again in November when the board issued stronger regulations concerning sexual harassment and workplace discrimination. The new amendment to the existing policy requires all casinos employing more than 15 people to implement written policies and procedures “prohibiting workplace discrimination or harassment of a person based on the person’s race, color, religion, sex, sexual orientation, gender identity or expression, age, disability, or national origin, including, without limitation, sexual harassment.”

In less than a year, Morgan is now up to speed. She admits her learning curve included a lot of consultations with longtime employees of the board about processes and procedures—“They probably think I’m in the weeds a little too much,” she laughs—to really understand how the agency works.

“I’m asking about the policies and the regulations, when they were enacted, why they were enacted, are those threats or concerns still active that we need to continue to be vigilant,” she says.

Since she was previously a member of the Nevada Gaming Commission, the “judicial” side of the bifurcated Nevada regulatory structure, Morgan says she felt familiar with the industry, but not complacent.

“You never know what you don’t know until you’re on the board,” she says. “I knew I was up to the challenge but I don’t think anyone really knows what the board does until you’re in it.”

Responsible gaming is an important consideration for regulators today, and Nevada is no different. Morgan says the board follows the policies established by the legislature, but she’s making it personal.

“I’ve reached out to the Nevada Council on Problem Gambling, as well as the national organizations, to get a better understanding of the issues and to see if there are best practices in other juris-



“We have such a strong regulatory system that we’re consulted by new states coming into gaming about how to do it right.”

dictions we should be emulating.”

Morgan points to the gambling court set up in Clark County as another way Nevada is leading the nation. The gambling court intervenes in crimes surrounding problem gambling the same way a drug court does.

“I want to commend Judge (Sheryl) Moss for setting up the first gambling court in the nation,” says Morgan. “She’s been a champion of problem gambling and is always looking for ways to help people afflicted with this illness.”

As for the gold standard, Morgan says it’s not going to be a static distinction.

“I not only want to maintain this reputation but enhance it,” she says. “We have such a strong regulatory system that we’re consulted by new states coming into gaming about how to do it right. We have a strong land-based regulatory system and our online and interactive members are increasing, so it’s important to stay ahead of the curve.”

—Roger Gros



Helping Hotels Thrive

David Woolenberg • *President and Chief Operating Officer, Duetto*

David Woolenberg has found a home at Duetto. Duetto is the rapidly growing producer of software that helps more than 3,500 hotel and casino properties in 60 countries optimize pricing strategies, intelligent reporting and revenue.

Woolenberg, who joined Duetto as chief revenue officer in July 2018, was elevated to president and chief operating officer of the company in September.

He feels a home at Los Angeles-based Duetto because it applies the principles of e-commerce to success in the hospitality/gaming industry. Prior to Duetto, he spent 15 years at e-commerce company Digital River, where he was general manager and senior vice president of sales.

Woolenberg joined Duetto not only because the company’s software packages are in his technological wheelhouse, but because of the company culture instilled by the firm’s three co-founders—CEO Patrick Bosworth, CTO Craig Weissman and Marco Benvenuti, formerly chief marketing and strategy officer and now company advisor.

“When I decided I was going to move away from Digital River, I was very clear in some of the things that I wanted,” Woolenberg says. “One, I wanted to go to a place that had a really a great culture, where people were excited about the business and what they were doing. Also, because I’d spent 15 years in e-commerce, I really wanted to find a place where I could leverage some of that experience. When I came upon Duetto, I was really excited personally. My family and I love to travel, and stay in great hotels. So, I already had a passion

“In hospitality, you have a lot of technology that surrounds hotels, but SAS technology and COD technology have not really permeated this very large segment of the global economy like it has in other industries. I really thought it was just an interesting kind of problem to solve.”

for that part of what Duetto does.”

The founders of Duetto had developed pricing and revenue strategy software for Wynn Resorts, and now provide hotels and casinos with software that ensures a pricing strategy that returns the best profit to the operator.

“As I learned more about the business, I was really excited about what we are doing,” says Woolenberg. “In hospitality, you have a lot of technology that surrounds hotels, but SAS technology and COD technology have not really permeated this very large segment of the global economy like it has in other industries. I really thought it was just an interesting kind of problem to solve.”

Also, as a longtime sales and revenue officer, Woolenberg says he was excited to learn the ins and outs of the new business. “I really had no idea about the culture of revenue management and revenue strategy, and all the complexity that was behind the scenes in a casino hotel, and just thought it was fascinating,” he says. “Then, having spent quite a bit of time with the three founders, Patrick, Marco and Craig, their passion for the industry, their passion for the business, was really exciting to me.”

Looking ahead to 2020, Woolenberg says his main priorities are to con-

tinue the rapid growth of the company by recruiting new talent and capturing a wealth of new business he says is there for the taking.

“Duetto has a remarkably strong brand given the relatively short history of the company,” he says. “We’re seven-plus years old and we have this brand that people recognize in our chosen vertical market. People are interested and people are getting excited about our story.

“We have this awesome mix of hospitality talent and technology talent and that’s always been there since the beginning of the company. And so I get this really cool mix of meeting with people from both sides of that spectrum, and it’s been a lot of fun.”

The growth of Duetto is undeniable. According to Woolenberg, the company’s workforce is growing annually at around a 40 percent clip.

“We are going to be doubling down on our core capabilities, which are pricing, forecasting, analytics and personalization. And that, in many ways, is what casino hotels and hotels hire us to do. And the best thing we can do is to get better and better at that, and continue to innovate and lead.”

—Frank Legato

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The Shops at Harrah's Cherokee

Architectural rendering courtesy of SRSS of North Carolina, Inc.

Home Game

Dana Schwartz • Sales Executive, Las Vegas Convention and Visitors Authority



Photo Credit: Mark Damon/Las Vegas News Bureau

Although she grew up in Las Vegas, Dana Schwartz went about as far away as you could go to attend college. Boston University was a nation away, but each summer she'd come home to Las Vegas and do an internship with the Las Vegas Convention and Visitors Authority (LVCVA), or with R&R Partners, the marketing arm of the authority.

But following her college career, she took a job with a Los Angeles public relations firm to start her career.

"When the (Las Vegas National Hockey League team) Golden Knights revealed their logo, I knew I had to come back," she says. "It was so exciting, and I vowed that I wasn't going to miss another historic moment in my home town."

Luckily for Schwartz, the LVCVA offered her a position as a sales executive and her career shifted into high gear. She now is involved in leisure and sports marketing sales. But her focus is esports.

"It's an exciting time because esports is such a new segment of the market," she says. "I've been attending all the conferences to learn about how esports can help bring more people to Las Vegas."

And Las Vegas is well positioned to attract the demographic that enjoys esports.

"We've got several casinos that are making esports a priority," says Schwartz. "But with the entertainment, the nightclubs and all the things that you can do in Las Vegas, esports fans have many choices."

And esports blends into sports marketing, in which Schwartz also has a role.

"Las Vegas has long been a mecca for sports marketing, whether it's the National Finals Rodeo or World Fighting Championship," she

says. "When these groups come to town, I help to find them accommodations at hotels to house their participants."

She says the LVCVA has some big plans for sports when the new Raiders stadium opens later this year, and she's eager to participate.

"Lisa Motley, who is the director of sports marketing and special events, has some great plans for the next year and I can't wait to get started."

Schwartz also helps entertainers find hotel rooms for their retinue and staff.

"If someone is coming to town with a residency and needs to find space for their team, we can help them with that," she says.

But esports is the focus for Schwartz. There are a few casinos with esports programs, and she's strategizing with them to attract tournaments, conferences and other esports events to Las Vegas.

"We're working closely together to bring these events to Las Vegas," she says. "Tournaments can be a big event for Las Vegas and the casinos."

Schwartz believes that esports in the U.S. is just getting started and that Las Vegas is getting in on the ground floor.

"They always have a great time when they come to Las Vegas to play or watch esports," she says. "We're preparing for more events and more esports involvement."

While Schwartz says that betting on esports isn't something she's involved in, it could add to the attraction of Las Vegas for esports fans.

"We welcome any development in the esports field that we can use to help promote Las Vegas."

—Roger Gros



Tapping New Markets

Drew Pawlak • Vice President and General Manager, Latin America, AGS

When gaming supplier AGS acquired Georgia-based slot supplier Cadillac Jack in 2015, the company got more than an excellent core slot platform on which to build—the company inherited a thriving operation in Mexico.

Cadillac's footprint of distributed games in Mexico at one time had numbered as many as 9,000 units, but the supplier had not reinvested a lot in Mexico as it pursued a Class III domestic casino business, and after the acquisition, AGS was determined not only to rebuild the Mexico footprint, which had dropped by more than 3,000 units, but to expand its growing library of Class III games to the rest of the Latin American market.

For this task, company President and CEO David Lopez turned to an expert.

Drew Pawlak had spent nearly 27 years in business development, first for laser-tag system supplier Ultrazone, where he oversaw building the business in North and South America. But it was his 12 years at international gaming testing firm BMM Testlabs that made him perfect for the task at hand. As senior vice president of business development for BMM, Pawlak developed a powerful network of contacts throughout Mexico and Latin America.

Pawlak joined AGS in 2016 as vice president and general manager-Latin America. Since then, the company's footprint in Mexico is back to more than 9,000 total footprint, with record sales in

2018 contributing to 13 percent of AGS' total AEBITDA. The company is now actively seeking out new and upcoming business across South America and the Caribbean. And Pawlak is using that established network of contacts to helm that effort.

"My first time in Latin America was in 1992, and I have been actively working in that region since," Pawlak says. "I spent a tremendous amount of time in Peru. BMM's South America headquarters were there, and I worked all the regional shows. It was a fantastic market for BMM and a fantastic market for gaming in general."

Since righting the ship in Mexico—"2018 was a record year, and our Mexico business is on track this year exceed last year's numbers," he says—Pawlak is concentrating on expanding the company's footprint in established and emerging markets across Latin America.

"First, we had to identify what Latin American markets we want to enter and prioritize those," Pawlak says. "Then we needed to make modifications to the platform and the library to make sure we have a product that complies, and that we believe would perform." The first AGS games went live in Argentina in November, and Pawlak says Peru is next, slated for the second half of 2020, followed by Chile. AGS is selling directly and working with distributors to place its products in Latin America.

Pawlak says the AGS Mexico team will be responsible for driving the company's expansion in Central America and the Caribbean—Panama, Dominican Republic, Belize and other growing markets.

Pawlak's other responsibility is to stay ahead of the introduction of gaming in new jurisdictions. For Latin America, that increasingly means the potentially huge market of Brazil.

"I've been entrenched in the Brazilian market for the last 13 years with the old operators and obviously the suppliers, who are clients and friends of mine from BMM," Pawlak says. "I believe that AGS is in a very good position should Brazil legislate, and I believe that they will."

"We're ready for Brazil. We've got a complete library of games—we currently supply Latin bingo in the Philippines, so our box originates in Brazil. AGS has a ground game, which is going to be the key to success for any international supplier into that region."

Meanwhile, the company continues to grow its business in Mexico, methodically introducing new cabinets such as the ICON and the Orion family, and the parade of new games that go with them.

AGS is poised to grow in Latin America and continue its momentum in Mexico, and at the center of that growth will be Drew Pawlak.

—Frank Legato

The entire team at Speaking Rock Entertainment Center would like to take this opportunity to congratulate Brian Bulko for his achievement of being named an Emerging Leader of Gaming under 40 during the Global Gaming Expo in Las Vegas this past October. Brian joined the team as Compliance Manager three years ago in 2016 while the Compliance program was in its infancy. He easily transitioned his knowledge in the banking arena directly to our facility. Through his leadership, the department has upped its game to not only addressing Title 31 and Anti-Money Laundering issues, but also migrated new policy and procedure for the facility, as well as organize and perform operational reviews across the floor.

"I felt strongly Brian would be a great addition to lead our Compliance Department after a very brief but comprehensive interview process. As it turns out, my instincts were right on the mark. He has demonstrated his worth time and again" said Chief Financial Officer Larry Price.

General Manager Karl Maahs added, "Brian has brought our Compliance Program to a point we feel it is world class."

We want to wish Brian continued success and growth in his professional development for years to come as he continues the journey with us.



BRIAN BULKO
Compliance Manager
Speaking Rock

Experience Counts

Jeff Hartmann • Co-Founder and President, *Experientia Development Partners*



Jeff Hartmann is co-founder and president of Experientia Development Partners, where the future of gaming lies, not in gaming, but in the amenities associated with it. *Experientia* is Latin for “experience.” Experientia develops “modern, authentic, amenity-driven experiences that complement existing casino resort destinations.”

“Experientia Development Partners is a real estate development company that focuses on gaming, bringing dining, entertainment, branded food and beverage to Native American casinos,” says Hartmann. “An example would be the Swingers indoor miniature golf concept. It draws interest to take a closer look. It’s a classic boy-meets-girl with a little golf and music.”

Hartmann leveraged his years at Price Waterhouse (now PricewaterhouseCoopers) and as CFO for Mohegan Sun.

“Taking the work we did at the Mohegan and bringing it to other clients,” he says. “New amenities that will drive repeat business by new customers who may not be visiting the casino property. We integrate various concepts and work with existing gaming operators to create a fantastic gaming experience.”

Hartmann is associated with the concept that the future of gaming is non-gaming. “The future of gaming will have a lot of non-gaming in it,” he clarifies. “It is creating an entertainment experience for all ages. Whether you are an esports player in your low 20s or a new sports betting customer who wants to have a great craft beer and throw some darts while he watches his game, it’s for getting people to stay on the property for longer periods.”

He adds, “We get hired by existing gaming customers and look at demographics and see who is *not* coming and how do you get them to come? What do they like to do? We help our clients using data-driven experiences.”

What works at the Harrah’s Cherokee Casino Resort in North Carolina won’t necessarily work in Palm Springs. “We curate a program specifically for that property,” he says.

Experientia is the developer, owner and leasing agent of The Shops at Harrah’s Cherokee, a \$115 million project of 223,000 square feet, with 150,000 square feet of dining and entertainment. It will have 45 shops. The project is being developed under a long-term lease with the Eastern Band of Cherokee Indians.

“It’s kind of a complementary project,” says Hartmann. “The band is evolving and building more hotels and adding our retail dining experience. It will make a great resort even better. It’s a project that will have regional brands and some of the national draw from food and beverage.”

When Hartmann contemplates casino resorts five or 10 years from now he envisions “a fully integrated entertainment experience, with food and beverage and core gaming. It can easily toggle back and forth. The day is over where sportsbook and poker is behind a wall. They will have to be able to react quickly. The open floor concept is the future, because it can be easily manipulated with changing floor layouts. You have to have that kind of floor to be able to move quickly.”

—David Ross

Seizing the Moment

Robert Ziems • President, Global Chief Legal Officer, Director and Corporate Secretary, *Aruze Gaming*

Robert Ziems’ professional history has been one of accumulating knowledge. After graduating from Drake University Law School in 1995, he spent seven years honing his legal skills—including law firms and a stint at Station Casinos.

But Ziems’ career in gaming would ultimately be on the supplier side, beginning in 2002, when he began



two years as assistant general counsel for Aristocrat Technologies and as executive vice president, general counsel and corporate secretary for Mikohn Gaming and its successor, Progressive Gaming International.

Ziems has been with Aruze Gaming for nine years, during which time his education has continued—a year as senior vice president of business development, then as executive vice president and general counsel, and in 2015, when he was made Aruze’s global chief legal officer. Two years later, he was made director and corporate secretary, in addition to his CLO duties.

During all this time, Ziems continued his business education, earning an MBA from Indiana University’s Kelly School of Business in 2018. A few months later, he was elevated to president of Aruze Gaming—in addition to those three other titles he still retains, chief legal officer, director and corporate secretary.

Ziems couldn’t have taken the helm at Aruze at a better time, as the company has been experiencing a genuine revival thanks to increased R&D efforts that have yielded products like the Muso-27 (winner of a Gold Medal in *GGB’s* Gaming & Technology Awards) and follow-up cabinets in the Muso line, along with innovative new electronic table games like Roll to Win Craps and unique slot games like the pachinko-style PachinCoin, a simulated pachinko game with no spinning reels.

Ziems says it’s all part of his personal ongoing education, which has advanced with every new position following his strictly legal start. “When I first got to Mikohn, I did some business development work,” he recalls. “When I started with Aruze, I actually started in a business development role.”

His progression of positions at Aruze, though, has given him a better understanding of the operations side of the gaming supply business. “We have a small production facility here, which gave me an understanding of the logistics of production and getting product out to customers,” Ziems says. “And then, much more involvement on the finance and accounting side, and plenty of interaction with the group.”

Completing his MBA, he says, put the cap on the preparations he would need to assume the president position last year.

The innovation has continued under Ziems' watch with new products such as Hawaiian Fishing, the follow-up to Aruze's groundbreaking community-style fishing game; and PachinCoin, a combination of pachinko and pinball that offers a fast-paced scoring of credits as a video ball bounces around pinball-style pegs.

Ziems says to watch for more innovation to pour out of Aruze's R&D department, centered mostly in Tokyo, in 2020.

"One of our greatest priorities is just to continue to provide entertainment and value to the players and the customers," Ziems says. "The 'E' in Aruze stands for entertainment. (The complete acronym is a bit complicated.) It's a really big deal for our founder that we provide good value and entertainment to players.

"I think we've got room for improvement, even though we're not a young company... We can be more modern in some of our approaches to the ways we do business. And that's a significant priority for me—getting our team to

focus on being more efficient in the way we do things."

Creating the right corporate culture also is critical, he says. "I'm big on the philosophy in which people take ownership of their roles," he says. "Each job is important, and each person needs to feel like they're a significant contributor to the company."

Ziems says one of his biggest opportunities for 2020 is to increase the floor share and ship share for Aruze's games. "We naturally fill about a 3 percent-to-5 percent floor share, so I think there's tremendous opportunity for us to increase our ship share and floor share," he says. "The Muso cabinet has been well-received; it was innovative in so many ways. And our R&D team is putting together such entertaining product, like the PachinCoin game. I think there's great opportunity for us to increase our floor share and ship share.

"One of our biggest challenges is meeting customer demand. I hope we are busting at the seams to try to build the games and ship the games fast enough to satisfy customers."

It's a good problem to have.

—Frank Legato



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Where The Wind Blows

Matthew Wesaw • Tribal Council Chairman of the Pokagon Band of Potawatomi and President of the Pokagon Gaming Authority

That didn't take long.

Matthew Wesaw, the tribal council chairman, Pokagon Band of Potawatomi, and president, Pokagon Gaming Authority, which oversees the management and operations of the tribe's Four Winds Casino gaming enterprises in New Buffalo, Harford and Dowagiac, Michigan and South Bend, Indiana, barely had time to enjoy the casino opening of South Bend in 2018.

Phase II has already begun.

Four Winds South Bend began an expansion featuring a 23-story hotel tower with 317 rooms, the Pokagon Gaming Authority says. There will also be a spa, convention area, meeting space, ballroom, lounge, bar & grille, outdoor roof-top swimming pool, and terraces with spectacular views. The hotel will be the largest in South Bend and the city's second-highest building, behind only the Liberty Tower.

"The expansion project will turn us from a bigger small property to a larger mid-sized one," Wesaw says. "We are excited about this and we still have space to expand again, but it is also important that we don't over-build. With the way gaming is going online, brick-and-mortar facilities could be in trouble down the road."

That favors beefing up the amenities side of the equation. The large, striking hotel will not only become a visual magnet, but enhance the property's ability to extend gaming stays.

"When you look at our market, the south and west is territory that does not have properties in that proximity," Wesaw says. "By having the hotel, we can draw from greater distances and still expand in the markets we are already in. We will be able to put people up now. A day trip of more than a couple of hours drive each way is hard."

Wesaw fashions a rich portfolio. During his 26-year career as a Michigan state trooper, he served as vice president of the Michigan State Police Troopers Association before retiring in 2001. He later represented the group as the director of government relations until 2008.

Wesaw has become the recipient of three gubernatorial appointments and was the first Native American to serve in the cabinet of a sitting governor in Michigan. In 2013 Wesaw was selected as the executive director of the Michigan Department of Civil Rights.

He has balanced several factors: civil rights and law enforcement, employees and management. These interests often clash, but Wesaw believes it does not have to be that way.

"What carried over is that everybody deserves the same respect and opportunity to be treated fairly," he says. "It does not make any difference who you are, or where you are, everybody has the right to live in a good place, have a good job and to be treated the right way."

—Dave Bontempo

Digital Determination

Michael Marino • Senior Vice President, Loyalty & Digital, Caesars Entertainment



Michael Marino enjoys an integrated age. Several areas blend into one for the SVP, loyalty and digital, for Caesars Entertainment. He oversees the Caesars Rewards Loyalty program, which consists of customers from Caesars' gaming, hospitality, and online businesses. Marino also is heavily involved in the Caesars.com e-commerce business, digital media, and the Caesars Rewards mobile app.

Marino and his area of specialization ascended in the past decade.

"There are three achievements which I am most proud of," he says. "The first and most recent is rebranding Total Rewards to Caesars Rewards. We believe that the rebranded program will strengthen our ability to attract new members both for gaming and hospitality.

"The second is designing the first true loyalty program on social games, which connected our games operated by Playtika with Caesars Rewards so our members could earn credit in our program while playing online. And the third goes beyond gaming, which is truly to digitize our business.

"Digital engagement was unheard of when I joined the gaming industry in 2012. Today, our guests engage with us through our leading digital products including our chat bot (known as Ivy, the virtual concierge), our website and mobile app."

Marino sees a big 2020 on the horizon via Caesars and Eldorado.

"The biggest and most visible project for 2020 is integrating Caesars Rewards into the nationwide Eldorado footprint," he says. "This integration will build the largest network of casinos in the world and allow our Caesars Rewards members the ability to earn and redeem credits in almost every jurisdiction that offers gaming. But behind the scenes, we will continue to improve our capabilities to personalize our guest communication to provide the right offers to the right guest at the right time. As the gaming industry continues to evolve to serve guests interested in more than solely gaming, our ability to personalize offers will ensure we can suggest to our guests the best experience for them."

Marino's previous roles within Caesars included vice president and executive associate to the chairman, president and CEO and director of marketing analytics.

Prior to joining Caesars, Marino worked at Bain & Company and Capital One Financial. He holds a BS in computer science and an MBA from the University of Virginia.

Marino obtained priceless insight along the way from industry professionals.

"I have had some great mentors over the years, but three lessons stand out above the rest," he says. "First, don't mistake activity for results, as ultimately we work in a results-based business. Second, don't let perfection get in the way of progress. I have adopted an agile approach over the years to launch quickly and optimize. And most importantly, we play a team sport. Individual accomplishments don't matter if the team doesn't win the game. MVP and Coach of the Year are individual awards that are awarded to people who lead great teams."

—Dave Bontempo



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Infinity and Beyond

Mario Kontomerkos • Chief Executive Officer, Mohegan Gaming & Entertainment

Talk about having a full plate!

As CEO of Mohegan Gaming & Entertainment, Mario Kontomerkos has responsibility for the enterprise-wide business that includes the Mohegan tribe's casino in Connecticut, a commercial casino in Pennsylvania, management of a commercial casino in Atlantic City, a partnership with three other tribes in New York, Louisiana and Washington state, and plans for a massive integrated resort at Incheon Airport outside of Seoul, South Korea.

First task recently for Kontomerkos was to protect his home field against competition from Massachusetts—MGM in Springfield and Wynn in Boston. He says the impact of the two casinos has been minimal and credits the management team in Connecticut. In addition, he says, Mohegan has been preparing for this competition for several years by expanding the appeal of the property.

“Strategically,” Kontomerkos says, “we strongly believe that non-gaming amenities are an important element of the guest experience and differentiator. Since opening the doors of our flagship property in 1996, we have been ahead of the competition offering guests an array of options that are more than just gaming. Mohegan Sun introduced to the Northeast market a world of play that had only been seen in Las Vegas offering gaming, dining, shopping, entertainment and meetings and convention space all under one roof.

“Heading into the new millennium, Mohegan Sun evolved into the next level of integrated entertainment resorts—one that combined the excitement of gaming with world-class hotel accommodations, acclaimed dining, vibrant nightlife, luxury shopping and live entertainment events including the 10,000-seat Mohegan Sun Arena which now ranks among the top three entertainment venues in the world.”

As for Mohegan's other U.S. casinos, Kontomerkos is enthusiastic. He points to increases in revenue in Atlantic City despite the introduction of new competition, positive growth in a declining market in Louisiana, and a need for more capacity at Ilani in Washington state as the business expands.

In New York a new arrangement with the Seneca Nation and the four casinos is off the ground and running.

“We have been very pleased with the results thus far which have been in line with our expectations,” says Kontomerkos. “The properties have fared well despite increased competition from the new commercial casinos in upstate New York.”

But the big prize is Korea, where the company plans to invest \$5 billion in the Inspire Integrated Resort. Kontomerkos says its proximity to 10 million residents of Seoul and another 10 million visitors to Korea makes it very appealing.

“The vision for Inspire is to create a true destination resort, with a comprehensive set of family-based entertainment offerings to attract and offer an unparalleled experience to both foreign and domestic Korean visitors,” he says.

In addition, Inspire should appeal to visitors from North Asia.

“Inspire's location on Yeongjong Island alongside Incheon International Airport gives it direct access to the sixth busiest airport in the world with 62 million passengers in 2017 and expected to grow meaningfully with Incheon's continued expansion.”

Kontomerkos is confident in the future of the company.

“With a robust and aggressive growth and development plan set ahead,” he explains, “we are hitting all marks to strategically grow the business. The Mohegan Tribe and MGE's role as one of the top developers of integrated resorts is no surprise based on the tribe's history of perseverance and overcoming adversity. We are where we are supposed to be at this point in the company's evolution.”

—Roger Gros



Conducting the Symphony

Cathryn Lai • Senior Vice President, Products and Marketing, Scientific Games

Gaming supplier Scientific Games is pioneering on many new fronts in 2020, from its vast and diverse—and growing—game library to new technologies that will change the way people fund play, change the way operators interact with and learn about their customers, and bring new customers into the casinos.

Leading all these efforts as senior vice president of products and marketing is Cathryn Lai, whose career has been one of managing innovation in the slot sector.

Lai's background isn't that of your normal slot-sector executive. First and foremost, she is a musician. She graduated from Oberlin College with a bachelor of music in piano performance and audio technology, earned her master's degree in music from the University of Houston—also in piano performance—and spent nearly three years on the faculty of DePaul University's School of Music.

Lai, in fact, ended up in the gaming industry by way of music. She earned her MBA in strategic management at DePaul in 2005, and went to work as a product manager for Shure Inc., the dominant company supplying microphones to working musicians around the world.

“I come from a creative background by nature through the music lens, a technical background through the audio engineering piece, and the business background with my MBA, so it was a good mix to work into product, especially in gaming,” Lai says.

In 2008, she took her product management expertise to the gaming industry in Chicago, where she spent five years as senior director of product management at WMS Gaming, moving to Scientific Games as vice president of products and strategy in 2014, when SG acquired WMS.

Lai has been senior vice president of products and marketing for Scientific Games since December 2018, and is now conducting a symphony of a different kind—managing what is arguably the most diverse product lineup in the business, from video and premium games to a dynamic lineup of stepper games to the SG Game Service, an ecosystem offering players a unified experience across slots, table games and the emerging sports betting business.

For 2020, Lai's concerto will extend across all channels. “We're rolling out a campaign called ‘Reimagine Play,’ which is really about the player focus,” she says. “In addition to the slot side, it's about how we are creating a unified player experience



“We’re rolling out a campaign called ‘Reimagine Play,’ which is really about the player focus. In addition to the slot side, it’s about how we are creating a unified player experience across all channels.”

across all channels.”

Part of that is the SG Game Service, which itself reimagines the power of a server-based gaming offering. “SG Game Service incorporates a lot of elements that tie all of the business units and products we have together,” Lai says. “It’s an on-premise, server-based product, where the games reside on this local server, but what it does is actually bridges all the different pillars of our product.”

Either on the game service or on the floor, those products are already causing a splash. “We launched our new Wave XL cabinet, and we augmented our library with a lot more content to support that launch,” Lai says. “We’re rolling out the TwinStar 5-Reel Mechanical cabinet with a new Dancing Drums game. We’re also bringing back some of the classic hits that did really well in the five-reel space.”

Other highlights to come include the spectacular TwinStar Wave XL Horizon hardware platform, which made a huge splash at G2E, as well as unique offerings like Gold Fish Frenzy, a true-physics pachinko game with no spinning reels. “We had a ton of new products, hardware and games, but one of the most notable was Gold Fish Frenzy,” Lai says. “That was the sleeper of the show, because it was so

different, and helped show more of the depth of what Scientific Games is capable of.”

For 2020, Lai says she looks forward to seeing how some of the emerging technologies displayed at the show will be adopted by operators. “If you look at technologies we showed (at G2E) like object recognition, vision technology and the server-based gaming, that’s going to be a big focus for Scientific Games in 2020. It’s going to evolve the player experience and drive more value to the operator. Some of these technologies will be a game-changer for casino floors in the future.”

That’s in addition to great core products, she says. Add in the new Quartz cabinet, a table-game progressive on the GM Atlas operating system, system-based bonuses through the Elite Bonusing System with iVIEW 4, and new technology that can remove both cash and plastic club cards from the casino equation, and Lai will be orchestrating quite a diverse symphony indeed.

She’s done it before. In music, and in gaming.

—Frank Legato

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Integrated Leader

Ayako Nakayama • Representative Director, Japan IR Association

The Japan market is already the focus of operators, regulators, and other key stakeholders around the globe as it comes to fruition after decades of waiting. Several prefectures have announced their intentions to seek one of the three licenses currently available under the Integrated Resort (IR) Implementation Bill. Several operators continue to position themselves in one or multiple jurisdictions to seek a partnership in the development of one of these IRs. However, one of the individuals leading that charge in the education of IRs across Japan is Ayako Nakayama, the representative director of the Japan IR Association.



As the leader of the Japan IR Association, Nakayama is leading the charge in building and promoting the IR industry across Japan. She also has been the public face of the emerging industry at various gaming conferences and events held around the world. She has used her position to help establish cross-border collaboration within and outside of the industry both domestically and internationally.

Serving as a conduit between operators, business leaders, the government and other key stakeholders, Nakayama has planned and managed to join the Sustainable Development Goals (SDGs) Public-Private Partnership (PPP) Platform through the Japanese government. Her previous work in the IT industry has offered her perspective in how systems integrate and how a larger global scale of development can play a role in achieving the goals established for IRs in Japan. The focus of these initiatives for Nakayama and the Japan IR Association is the planning and managing of activities that emphasize women's success in the IR industry, diversity, sustainability, and regional development support.

Since the inception of the Japan IR Association, Nakayama has successfully organized and implemented a series of IR-related seminars connecting industry experts and operators to educate members of the Japanese Diet and local governments. These sessions have included efforts on non-gaming amenities such as entertainment and other key aspects in the development of integrated resorts. They have been instrumental in connecting stakeholders to gain a deeper understanding of economic impacts, job creation, and development of the hospitality industry throughout Japan.

Nakayama continues to be a driver in promoting and educating interested parties in Japan on the development of integrated resorts. Whether it is her presence within Japan or on the international scene, Ayako Nakayama will be one to watch in 2020 as IRs finally move forward in Japan.

—Brendan Bussman, Global Market Advisors

Engineering Success

Mackenzie Haugh • Senior Director of Engineering, Gaming Laboratories International

Who says work isn't fun and games? Mackenzie Haugh has employed both of those phrases for two decades at Gaming Laboratories International.

"It's been fun for me from day one," says the International Falls, Minnesota native, who joined GLI in 2001 and serves as its senior director of engineering. Haugh's roles run the gamut of impersonating a hacker—thus identifying a product's security vulnerability—to directing entrepreneurs toward regulatory approval via knowledge of each state's laws. That approval culminates a long testing process, complete with substantial investment from the developers. A blessing from GLI often spearheads a product to market.

"Like many of my peers, I entered the industry of regulated gaming quite a long time ago with no prior (meaningful) understanding of it other than a Scorsese film," Haugh says. "I was immediately fascinated by the complexity and customization within each market and enlightened by all of the regulations in place to protect players.

"But I consider the dedication and passion from all of my colleagues throughout the years that has and will keep me in gaming. Our industry is full of smart, engaged individuals who are oriented to help each other. It's refreshing and inspiring."

Haugh has extensive experience in the regulatory compliance testing of games, platforms, systems, hardware, and peripherals for land-based, server-based, lottery and interactive products. He is responsible for directing, controlling, and improving engineering activities across GLI laboratories in Colorado and Vancouver. Haugh interfaces with government regulators, suppliers and operators around the globe to ensure products meet the expectations of the field.

"We also engage them and help them understand what they are trying to do," he says. "We know the regulations of all the jurisdictions. The other day, someone had a request for a product in 13 markets. We started asking questions and determined that if we just took two markets away, we saved them 40 percent of what the cost would be."

Haugh says GLI is obsessed with anticipating its customers' varying needs.

"One example can be finding a betting strategy in a math model to reveal an RTP above 100 percent, discovering a vulnerability in a geofencing solution which would allow off-jurisdiction gaming, uncovering a calculation error which reports revenue incorrectly by a factor of a hundred," he indicates. "These are just a few examples of how we assist our clients from a product evaluation perspective. And product evaluation is only the tip of the iceberg in how we anticipate needs and deliver solutions for our regulator, supplier and operator customers."

Haugh says product designs are more complex and diverse than ever and time to market has never been more important. This makes GLI hone its capabilities even more.

"We have to keep pace with all technologies to ensure we can demonstrate that all products fully meet the requirements for each market," he indicates. "We constantly learn new development methods and make new tools to expand testing coverage while meeting market demands.

—Dave Bontempo





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by Frank Legato

Golden Ram

AGS

This latest game on the Orion Upright dual-screen cabinet features a Greek-inspired theme centered around the sacred and mighty golden ram.

The base game is a five-reel, 243-ways-to-win scatter-pay video slot in the Money Charged Jackpots progressive link. There are four progressive jackpots, the top resetting at 1 million credits (\$10,000 in the penny denomination, in an available range to \$10 million in the \$10 denomination).

The main bonus feature is a hold-and-spin event that can be triggered in two different ways. Three bonus symbols trigger a pick bonus that results in either a free-spin event or the hold-and-spin bonus. The free spin event awards a random number of up to 15 free games with extra wild symbols on the reels. Retriggers can result in a maximum of 25 free games with a random number of wild symbols.

The hold-and-spin feature, called the Supercharge Bonus, can be triggered either through the pick bonus or



through six scattered triggering symbols on a spin. The special trigger symbols remain on the reels during three re-spins. Each time another trigger symbol lands, the clock goes back to three re-spins. Each trigger symbol reveals either a credit amount or one of the four progressive jackpots.

The Major, Minor and Mini jackpots, thus, can be won multiple times in a single bonus session. The Supercharge Bonus lasts until three spins yield no locking trigger symbols, or until the entire screen fills with credit symbols and/or progressive awards. The player is then awarded the total accumulated bonus amount on the reels.

Manufacturer: AGS

Platform: Orion Upright

Format: Five-reel, 243-ways-to-win video slot

Denomination: .01, .02, .05, .10, .25, .50, 1.00, 2.00, 5.00, 10.00

Max Bet: 50, 100, 150, 250, 500

Top Award: Progressive; resets at 1 million credits times denomination

Hit Frequency: 4.1%-14.88%

Hawaiian Fishing

Aruze Gaming

This is the latest sequel in Aruze's community-style fishing game series that started with Paradise Fishing and was improved with Amazon Fishing.

Central to the game is a fishing bonus in which all players on a bank use physical rod controllers on the front of the game to compete for fish in a "habitat" formed by adjacent 55-inch top monitors on the Muso Limited cabinet.

Just as in Amazon Fishing, the controller provides natural resistance as a fish is caught, capturing the bonus indicated on the fish. There are two inaugural base games in the Hawaiian Fishing series, Bluefin Tuna and Dolphinfish. Both place the fishing habitat in the waters of the Hawaiian Islands.

Each base game is a five-reel, 30-line video slot. Two individual features can be triggered by the main game reels. The Sea Fishing bonus is triggered by bonus symbols on first and third reels and a "Bait" bonus symbol on the fifth reel. The more bait of that type that have been collected prior to triggering the bonus, the more fish can be caught. When two bonus symbols appear on reels 1 and 3 but no Bait bonus symbol appears on reel 5, the Ground Bait Bonus may be



randomly triggered. The player's character will throw bait from their boat into the water, and the player may catch one fish.

The community Sea Fishing Competition, Good Catch Competition, Quick Catch Competition and Big Game Fishing Competition are held on the top screens, and are triggered randomly. In the four shared bonus features, every player will share in a competition and furiously try to reel in some fish. Each fish yields a credit award, and at the end of the event, the top three fish-catchers are awarded an extra bonus.

Players remain eligible for these bonuses for a certain amount of time while playing. A meter displaying this amount is always visible to the player during regular game play.

Manufacturer: Aruze Gaming

Platform: Muso Limited

Format: Five-reel, 30-line video slot

Denomination: .01

Max Bet: 250, 500

Top Award: Various

Hit Frequency: 3.93%-14.93%

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How casinos work with local attractions to build business, on- and off-property

By
Marjorie Preston

In the holiday fable *Miracle on 34th Street*, a department store Santa broke the No. 1 rule of business by telling a harried mother to patronize the competition. You may remember the scene, in which the jolly old elf advised a Macy's shopper to (gasp!) go to *Gimbels*.

Of course, the story ended happily, with Mr. Macy, Mr. Gimbel and Kris Kringle proving that cooperation among corporate rivals can actually be good for business, leading to more satisfied customers, more ringing cash registers, and a better bottom line.

It works for casino resorts, too, but for generations, the industry eschewed the cooperative model in favor of an isolationist, "every-man-for-himself" mentality.

Jeff Vasser, former longtime head of the Atlantic City Convention and Visitors Authority (ACCVA), remembers the early days of casino gaming in the shore resort, in which casinos were self-contained fortresses-by-the-sea. "The old marketing mentality was to keep people inside the four walls," says Vasser, now executive director of the New Jersey Division of Travel & Tourism. "There were no windows and no clocks on the casino floor, so they'd have no idea of what time it was or how long they'd been there."

Busloads of patrons were brought in from markets like

Philadelphia and New York, dumped at the front door, and rounded up in the same spot a few hours later to be hauled back home. They didn't have to take note of local sights—not even the beach, the Boardwalk and the Atlantic Ocean, just steps away from the casino door.



These days there's a more cooperative spirit among businesses on the Atlantic City Boardwalk—and that includes the city's famous casinos



"The industry knows that being part of the community and giving people more reasons to come is good for everybody."

—Jeff Vasser, Executive Director, New Jersey Division of Travel & Tourism

Break with the Past

That limited mentality is long gone, says Vasser. “The industry recognizes that keeping people in town longer is for everyone’s benefit, and if somebody goes outside those four walls for another attraction or conference or show or to go shopping, it’s not going to negatively impact their players. They know being part of the community and giving people more reasons to come is good for everybody.”

What started the trend away from what might be called entertaining captivity? “It started in Vegas in the 1980s, where people started talking about diversifying the base of what the tourism guest was offered,” says Vasser. “People in Las Vegas tended to come fewer times a year, but stay longer”—and over a couple of days, could easily exhaust everything of interest inside their own resort.

“At the most, people gambled three to four hours a day, and there are only so many things you can have within a casino to keep them there,” says David Schwartz, director of the Center for Gaming Research at the University of Nevada, Las Vegas. “You’d rather have people leave your property at the end of a couple of days saying, ‘I had so much fun, I can’t wait to go back’—instead of, ‘I ate at every restaurant. I saw the show. I have no reason to return.’”

It’s especially true these days, Schwartz adds, with so much competition in the industry. “People need reasons to visit beyond the gambling, which they can probably get close to home anyway.”

Take the National Finals Rodeo. The 10-day cowboy extravaganza, created to liven up Las Vegas in the dead of winter, drew more than 170,000 people in December 2018, for \$187.5 million in economic impact for the city. Virtually every property, uptown, downtown and out of town, piggybacked on the rodeo with special concerts, hotel packages and themed parties.

“In general, it’s trying to build that critical mass,” says Schwartz, “and give people different reasons to come and stay.”

There She Is

In Atlantic City, the first property to use the Vegas model was Borgata. Prior to its opening in 2003, AC was mostly a comp market, catering to gamblers who stayed and ate for free, and whose value lay almost exclusively in their casino play.

Borgata, by contrast, “went upmarket,” says Vasser, with celebrity restaurants, plush spas and buzzworthy nightclubs. “Suddenly casinos realized people would pay \$400 a night for a premium product on a weekend.

“For the next 10 years, everyone was playing leapfrog, trying to outdo each other with non-gaming—hence the development of the Walk (an outlet shopping district in the center of town) and the Pier Shops at Caesars,” a luxury retail, dining and entertainment center on the Boardwalk, with a lineup of boutique brands like Armani, Gucci and Louis Vuitton.

In 2004, the Tropicana opened the \$250 million Quarter, a Cuban-



“People need reasons to visit beyond gambling, which they can probably get close to home anyway.”

— David Schwartz, Director, Center for Gaming Research at UNLV



The National Finals Rodeo in Las Vegas brings an economic boost to the whole city, and casinos capitalize on it

themed dining and retail complex, “and didn’t add one slot machine,” Vasser notes. “It was all about the Havana Tower hotel, more convention space, and more dining and shopping options. It was a huge success—and their gaming revenue went up, too.”

Atlantic City got the message. It staged its own rodeo—the American Finals, held at Boardwalk Hall every October until 2018—and welcomed the Atlantic 10 men’s basketball conference, a popular draw at the same venue from 2007 through 2012.

The A-10 was a bonanza for the city, drawing players, families and fans from key feeder markets Philadelphia, New York and Washington, D.C., says Vasser.

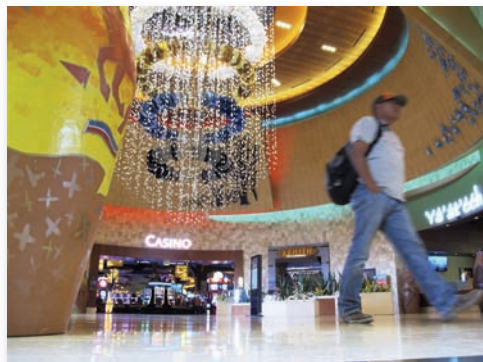
“We had just started direct air service from Cincinnati, so it brought in a whole group of people that hadn’t been to Atlantic City before. There was a lot of time between sessions to go out on the Boardwalk and walk to the Pier. The industry started adopting different schools, reaching out to players from those regions and offering room packages with dining and tickets to the game.”

Concerts were big attractions too; casinos bought up huge blocks of tickets for premium players. The first time Bruce Springsteen played Boardwalk Hall, a caravan of limousines snaked through the streets, carting casino high rollers to see the Boss onstage.



“It’s in our best interest to work collaboratively, which creates a rising tide effect for everyone.”

—Brian Parrish, CEO, Navajo Nations Gaming



Twin Arrows, a Navajo Nation casino in Arizona, co-markets with a number of businesses in nearby Flagstaff, to the benefit of all

Then there was the famous Miss America pageant, held every September in the city from 1921 until 2005, when it moved to Las Vegas. (Fickle pageant organizers returned to the shore resort in 2013, but decamped again in 2019 to Mohegan Sun in Connecticut.) In its halcyon days, however, the pageant was a revenue jackpot for the city’s casinos, which essentially split the 50 states among them and sponsored their delegations with special room rates and other perks.

The Right Mix

Brian Parrish, CEO of the Navajo Nation Gaming Enterprise, cites research studies by Harrah’s Entertainment and the American Gaming Association that indicate “about a third of U.S. adults have a propensity to gamble, but you are not going to convert those who don’t.”

According to Parrish, “You need a good mix of non-gaming to attract those other people, but it helps to develop gaming revenue at the same time,” especially if one half of a couple gambles and the other doesn’t. “Nowadays in any jurisdiction, you need amenities that appeal to a broad number of people.”

The Navajos’ four casinos in New Mexico and Arizona make a practice of co-marketing with local businesses, he adds. “We position ourselves as an additional amenity in the area, which offers skiing, hiking, biking, white-water rafting, the Grand Canyon... (Twin Arrows Navajo Casino Resort) has a lot of strategic partnerships with businesses in Flagstaff. We participate in and sponsor all the citywide events: rodeos, festivals, shows at the (Pepsi Amphitheater). It’s in our best interest to work collaboratively, which creates a rising tide effect for everyone.”

In one distinctly local promotion, the nation’s Fire Rock Navajo Casino in the Gallup, New Mexico area offers vouchers that can be redeemed at T&R Feed and Rope Center, a local ranchers’ supply store.

“In return, they advertise for us,” says Parrish. “We’re giving back and partnering with our community, and by the way, our players can buy feed for their livestock.”

All Together Now

Similarly, the Baltimore-based Cordish Companies’ Live! Casino & Hotel brand offers rewards that include “dining, cruises, local attractions, world-

class entertainment and more—ensuring that we’re continuously providing unique offers and benefits to card-holders,” says Niki Felton, senior vice president of marketing. “The relationships we’ve fostered with our partners are the reason our program continues to be one of the best in the country.”

Back in Atlantic City, one model of cooperation has brought together casinos and local businesses to beat the drum for a section they call “North Beach.” Partners include the city’s first casino, Resorts; the new Ocean Casino Resort (formerly, and briefly, Revel); and Hard Rock Hotel & Casino (once Trump Taj Mahal).

Sharon Franz, sales and marketing director for the 122-year-old Steel Pier, credits a flood of competition in Pennsylvania, Maryland and surrounding states for getting the once-insular resorts to pull together, and also work with attractions outside their doors.

“Competition got so big within a three-to-five-hour drive that casinos in Atlantic City started to feel the heat—that’s when everybody started to re-think their strategy,” says Franz. “The greatest thing is that, even though we’re all competing for each other’s business, we’re working together. Where else do you have three casinos partnering to create a difference and a brand?”

In a 2019 interview, Eric Matejevich, former acting CEO of Ocean Casino Resort, seconded that emotion. “We’re all working together for the first time to highlight what is a great experience here in North Beach,” he said. “A guest can have three totally different casino experiences with maybe 40 different restaurants within a 10-minute walk.”

North Beach also includes businesses along Tennessee Avenue, dubbed the “Orange Loop” because of the street’s color on the Monopoly board. New attractions there—beer halls, restaurants and music venues—all are part of the group promoting the area, as is nearby Absecon Lighthouse.

Evan Sanchez is an Atlantic City resident, entrepreneur and co-founder of Authentic City Partners, the force behind the Tennessee Avenue renaissance. He says casino resorts and small businesses in Atlantic City are “working hand-in-hand to offer awesome experiences to visitors. Being able to move from big to small for entertainment and dining is key to providing a great all-around experience. There’s no doubt that a thriving Atlantic City is in the best interest of all stakeholders.”

It’s not every man for himself today, but all for one, one for all. Kind of like Macy’s and Gimbel’s.



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Bowled Over

Brian Bulko

Compliance Manager, Speaking Rock Entertainment Center

For Brian Bulko, El Paso means more than a catchy old song by Marty Robbins. He was born and raised in the border town, and also earned a bachelor of business administration degree at the University of Texas campus in El Paso. In 2016, after working in various local service and retail chains, he got a job at Speaking Rock Entertainment Center—also in El Paso.

What drew Bulko to the casino industry—besides staying in El Paso—was the potential for growth. Speaking Rock currently employs more than 700 people in the local community. “It is a primary source of economic growth and sustainability. The opportunity to contribute to that inspired me to make a career change,” he says.

As compliance manager, Bulko develops and implements all aspects of the anti-money laundering program and oversees day-to-day compliance with Title 31, which deals with financial crimes. In addition, he manages the development and implementation of all written departmental policies and procedures and conducts internal operational reviews of cash operations, security, surveillance, guest services, and food and beverage.

The greatest obstacle Bulko has faced is his age.

“I have notoriously been considered young whenever I advanced to a new position. I’ve always overcome this by being confident with what I bring to the table. When you realize you’re there not because of coincidence or luck but your skill, education, experience and talent, you open yourself up to your potential,” says Bulko, an avid bowler who serves as president of the Bi-National Friendship Bowling Association and is vice president of the El Paso United States Bowling Congress. The Bi-National is an association of male bowlers from the Southwest and Mexico, which hosts tournament in El Paso and Juarez.

Bulko acknowledges help from numerous mentors, starting with his parents. He also cites Monsignor Francis Smith; when Bulko was an altar server during Mass, he brought a discrepancy to Smith’s attention. After mass, the monsignor pointed out that while he noticed something wasn’t done right, those in the church do not.

“I’ve incorporated this into many of the policies and procedures I develop,” Bulko says. “If there’s something in question, it can be discussed offline. Your patrons don’t know whether or not you made a mistake.” It’s a credo he still quotes today.

Bulko has some advice for those interested in gaming. It’s all about finding your passion, he says.

“See how your passion can contribute to the industry,” he says. “I believe that often people are not aware of all the opportunities. They only see the obvious ones located on the floor in the view of the public. The industry has so much to offer, from accounting and marketing to information technology and compliance.”

As for the future, Bulko and his family—wife, Rudi and son, Bradley—have roots in El Paso. “Speaking Rock Entertainment Center is where I see my future. Yet the industry is global, with opportunities everywhere. I never know where those might take me.”

—William Sokolic



“When you realize you’re there not because of coincidence or luck but your skill, education, experience and talent, you open yourself up to your potential.”



Searching for the Challenge

Loren Rosenberg

Vice President Product & Market Strategy, Everi Holdings, Inc.

Loren Rosenberg joined Everi Holdings as vice president of product and market strategy. With more than a decade of sales, manufacturing, and product development experience, he was ready to build out a long-term product portfolio with a breadth and depth of solutions for Everi’s games division.

Rosenberg was recruited out of Cornell by WMS Industries, where he participated in a management development program—rotating through commercial functions. “It was a great opportunity to be that young in my career, and to get that kind of exposure,” he says.

Ken Lochiatto, then COO at WMS, was Rosenberg’s first manager and early mentor. He provided a wealth of industry knowledge and firsthand exposure to executive decision-making, and demonstrated the importance of relationship-building.

Rosenberg joined the WMS sales team full-time, working for industry veteran Jim Heater, another strong mentor. In a short time, he more than doubled revenue for his region, while also cultivating and maintaining strong relationships with casino operators.

After four years, Dean Ehrlich, then senior vice president of gaming operations at WMS, presented Rosenberg with an opportunity to oversee leasing strategy and to rebuild the analytics team from the ground up. Rosenberg dove deep into data analytics and focused on commercial revenue opportunities. He was part of the team that pioneered the “Pod Strategy,” a banking technique for leased product incor-

porating eye-catching signs, designed to migrate leased product from back walls to more premium gaming floor real estate. This innovation helped grow WMS' recurring business by 30 percent.

In 2013, Scientific Games acquired WMS and Rosenberg faced a new challenge: gaining alignment of his vision of a newly merged gaming operations team. In this role, he evaluated the differing business models, sales strategies and data structures and looked for synergies and growth opportunities as the businesses weaved together.

Not long after, he decided to pursue his executive MBA, and was the youngest student in a class of 60 at the University of Michigan, Ross School of Business.

After finishing his master's program, Rosenberg was at a crossroads in his career. He knew solving key business challenges and driving an organization forward were major drivers for him, and both needed to be at the heart of any new role he would take on. The perfect fit came at Everi.

He found that Everi welcomed a laser-focused and disciplined approach aimed at moving the needle against competition. Rosenberg is most proud of the past year in his career. With the culmination of G2E last October, there has been resounding feedback from the industry, analysts and customers that Everi's current portfolio and outlook is stronger than ever, proving that his approach of ruthless prioritization is already yielding results.

Rosenberg feels "very fortunate to have a great team to support, enable, and empower."

He wants to give his team the opportunities he's been given to help them face new challenges and solve problems collectively. "It's a group effort," he says. "We have great designers, product managers and tech personnel."

In his time away from strategy and development, Rosenberg travels the world with his wife Anneliese. Recently, they took the trip of a lifetime to Africa, and make time for international travel a few times a year. Most recently: a tour of Germany, Austria and the Czech Republic over the holiday season.

—Chloe Fletcher, Manager, Data Analytics; and Megan Gold, Analyst, The Innovation Group

Put To The Test Afshien Lashkari

Lead Engineer, Technical Services Bureau,
New Jersey Division of Gaming Enforcement

Afshien Lashkari is a Jersey boy. He grew up in Cranford in central New Jersey, obtained a bachelor of science in electrical engineering from Rutgers, and joined the state Division of Gaming Enforcement (DGE) in South Jersey as lead engineer for the Technical Services Bureau.

"When I saw the job posting and did my research on all that the NJDGE does regarding the regulation of the Atlantic City casino industry, it seemed like a very exciting opportunity," he says.

More than 17 years later, the excitement hasn't diminished, Lashkari says. As technology has evolved, the products submitted for approval continuously change, making every day different. No longer does his department just test slot machines in brick-and-mortar casinos. With the legalization of iGaming in 2013, the responsibilities expanded to include the testing of web systems and approving online live dealer integrations as well as approving a multi-jurisdictional poker network.

In 2018, the scope expanded again to include sports betting systems, both brick-and-mortar and online. Such testing ensures products comply with state regulations prior to being released to the public.

"My role allows me to utilize my technical experience as well as my strategic management background gained from my MBA," he says.

Lashkari's job is not without obstacles. His department was tasked with launching internet gaming in nine months. Within that period, his team created a strong foundation with the technology as well as testing protocols to comply with regulations.

"The key to any challenge is to identify the critical success factors, which allows you to focus on the most important elements of the project," says Lashkari, who recently completed his first century ride, biking more than 100 miles.

Lashkari credits those around him for guidance, from his parents, who encouraged him, to his wife, Jenny, who supports his passion and enthusiasm for the industry.

"During my professional career, I've also been lucky in that I've learned a great deal from every boss," he says. "In my opinion, a characteristic of leadership is one where a culture is created that al-



"The key to any challenge is to identify the critical success factors, which allows you to focus on the most important elements of the project."

lows an employee to continue taking on additional responsibilities as they prove themselves."

The phrase "lessons learned" serves as one of Lashkari's credos. Sometimes efforts may not work out as planned, he says. "The important part is to evaluate the situation to determine what went wrong, then taking that feedback and using it as a lesson learned for the next time."

His experience with a jurisdiction at the forefront of both internet gaming and sports betting can open a host of doors for the future.

"I would like to be in a position to continue helping with the growth of these industries, especially as more and more states pass legislation to provide these types of gaming," says Lashkari, who enjoys spending time with his nephews, 7-year-old Leonardo and 1-year-old Marcelo.

He has a tip for those coming up in the industry: remember every project provides additional knowledge and opportunities for self-improvement.

"The other piece of advice I would give to younger people is to never be afraid to ask questions about a topic," he says. "Take advantage of the experienced people around you to help create a great foundation in gaming especially in the beginning of your career."

—William Sokolic

Power Play

What happens when licensed gaming companies use regulators to keep competitors out of the market?



By Tony Cabot

The impeachment drama alleging that President Donald Trump used a foreign government to investigate a political rival to gain a personal advantage mirrors a circumstance long present in the gaming industry—specifically, when gaming companies use the power of gaming regulators, typically through a license investigation, for personal advantage.

Nevada folklore includes the tale of a gaming company that employed an individual to keep track of license applications. This individual's regular responsibilities included conducting private investigations that regulators could then use to discredit potential competitors in the licensing process. His scathing reports were so systematically provided, according to legend, that the gaming agents nicknamed him "Agent Orange."

Other ways exist for third parties to weaponize the regulatory process. Gaming laws often define what happens if regulators deny a license to a shareholder, including requiring the company to redeem the stock and setting the price of the redemption. Other times, a shareholder's agreement gives the company broader rights to redeem if the regulators initiate a regulatory investigation.

The purpose of stock buyback provisions in shareholder agreements is to give companies the ability to exercise in good faith to redeem the shares of a person whose mere involvement in a company can threaten the company's ability to get or retain the necessary licenses to conduct business.

In general, buyback provisions should be extraordinary remedies. Shareholders owning less than a certain percentage of the stock (5 percent or 10 percent) typically do not have to obtain a license but are subject to discretionary licensing. The purpose of not requiring every shareholder to obtain a license is to encourage investment. Most shareholders acquire stock for investment purposes with no expectation that they will one day have to undergo costly and intrusive investigations.

A company, however, can abuse the regulatory system. Suppose a person bought at \$5 per

share, and, much later, the value skyrocketed to \$100 per share. If the law or shareholder's agreement sets the redemption price at the purchase price, then the company would stand to make \$95 per share if a shareholder is found unsuitable to hold a license.

This strategy works if the shareholder cannot sell in a public market. With tradeable stock, the company may try to convince regulators to prohibit the sale of the stock and force redemption under the terms of the shareholder's agreement or the law at less than fair market value.

A second and equally problematic scenario is where management or shareholders want to eliminate rival shareholders by enticing regulators to invoke discretionary licensing. For example, a management group with the support of 45 percent of the existing shareholders can get to 51 percent by eliminating a 9 percent unlicensed shareholder through licensing.

Another method used by competitors is to provide negative information to encourage regulators to instigate an investigation. A competitor can then use the fact of a pending investigation to disparage the competitor in the marketplace.

Why should regulators be concerned about offensive misuse of the regulatory process? First is the waste of agency resources if the allegations are false or unsupported. Second, investors will have less interest in investing in the gaming industry or new companies in entering the business if they believe others can readily abuse the regulatory system with significant impacts, including damage to reputation and cost. The accused has a disproportionate expense and time commitment to disprove false or misleading allegations, and costs compound if the claims spread to regulators in many jurisdictions. Third, where the attacks are personal, they cause emotional distress and life disruption.

Indeed, gaming regulators want and expect that when licensees encounter unsuitable acts or individuals, they should report them. So, balance is essential. Regulators should ask:

Does the accuser have an ulterior motive? Is the accuser intentionally providing false or misleading information or doing so with disregard for

the truth? Is the timing of the accusations a matter of concern?

If the information is accurate, reasonably supported by facts, and material to the shareholder's suitability, companies should be free to report it even if ulterior motives are evident. The regulators should be skeptical in the presence of ulterior motives.

When encountered with surreptitiously provided disinformation, regulators most often only reject the allegations. Ulterior motives combined with false, misleading or immaterial information require a stronger response.

First, the licensed company is attempting to abuse the system and is wasting agency resources. Almost every justice system recognizes that filing false information with police is a crime. Likewise, similar consequences should befall an offending licensee.

Second, a regulator's failure to take a more proactive response can harm its jurisdiction. An offender will likely attempt to spread false or misleading allegations to all regulators that have the power to harm their shareholder or rival. If it finds a single authority that through incompetence or corruption pursues the claims, the consequences are universal because a shareholder cannot divest in one place and not all others.

Instead, regulators should take affirmative action to maintain the integrity of the regulatory process by initiating disciplinary action if a licensed person or entity (1) knowingly files false or misleading information or does so in reckless disregard of its truth, (2) selectively targets specific shareholders where the allegations are common among many shareholders or are immaterial to suitability, or (3) knows or should have known of the allegations significantly before it reported them to the regulators.

Anthony Cabot is the Distinguished Fellow of Gaming Law at the Boyd School of Law, where he teaches gaming law. Before joining the Boyd School of Law in March 2018, he practiced gaming law for 37 years.

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The Party's On!

Sports betting continues to spread across the U.S. as suppliers fight for market share

By Dave Bontempo

Pop the champagne. Disperse party hats. Sports betting resembles the gala effect of an endless New Year's Eve marathon. This one will extend beyond January 1, officially launching a new-age Roaring '20s for a hot industry newcomer.

Sports wagering has dwarfed expectations, gracing casino balance sheets and state government coffers with visions of upside.

And the gaming industry says pour another drink.

Fever-pitched enthusiasm greets historic milestones recently celebrated in New Jersey and Nevada. The states combined to handle more than \$1 billion in wagers for the first month ever. Numbers may spike higher in the near term with pro football and basketball schedules as the sports-betting train finds more steam.

Foundation for Success

There are reasons American states trip over each other racing to enact sports-betting legalization. Revenues far exceed expectations because of product enhancements and human nature.

On the technology side, mobile capability has been an industry god-send, providing bettors with hand-held sportsbooks.

In the pragmatic realm, the rarely discussed element of trust plays a monumental role in the success of sports betting. Major gambling tickets spring from players once hindered by the PASPA era's illegal operations. Players no longer worry about being stiffed by a bookie. They know they'll be paid by legal operators. These factors have unleashed bets never seen during the PASPA age.

One FanDuel player hit a 15-team money-line parlay last month that returned more than \$229,000 on a bet of \$200. A bookie would not have been entrusted with that, and scores of wagers in this category weren't even imagined by those pushing legal sports betting.

Companies that service this market observe an era they will relish for decades.

Kambi Clicking

Kambi is a provider of premium sports betting services to licensed B2C gaming operators. Its services encompass a broad offering from front-end user interface to odds compiling, customer intelligence and risk management, built on an in-house developed software platform. Its customers include Penn National Gaming, Rush Street Interactive, Kindred Group, 888, Paf, Televisa, LeoVegas, Mr Green and Napoleon Games.

In 2019, Kambi sizzled. The company was well-stocked from an infrastructure standpoint, ready to pounce on opportunities in the post-PASPA U.S. market. Its recollection of the year resembles a recap of a championship season.

"Our landmark early customer signings in the U.S. with operators including DraftKings, Rush Street and Parx gave us a great deal of momentum; 2019 was a story of keeping that momentum up and continuing to educate the market on how we're the clear choice to springboard visionary sportsbooks," says Max Meltzer, Kambi chief commercial officer.

"We signed a number of landmark deals while empowering our existing partners to differentiate—enabling them to do so in a manner where they can build their own IP on top of our powerful APIs and drive growth across multiple states," he says. "We signed the largest deal of its kind in the U.S., becoming the sportsbook provider for Penn National, which operates land-based properties in 19 states. We also signed JACK Entertainment, one of the top casino operators in Ohio, which is a very exciting state for 2020.

"We're also very proud of the way the tribal community has embraced Kambi and our integrity-first approach, signing two excellent partnerships with Mohegan Sun and Seneca Gaming Corp."

Meltzer says the pace of regulation in the United States caught some operators and suppliers "a little on the back foot. They have therefore needed to channel much of their time and resources into simply getting their tech stack to a compliant place." Once they have permission to operate, Kambi can get them in the game quickly, a major consideration if it occurs during the lucrative NFL season.



"2019 was a story of keeping that momentum up and continuing to educate the market on how we're the clear choice to springboard visionary sportsbooks."

—Max Meltzer, Chief Commercial Officer, Kambi

Meltzer says in-game wagering in the U.S. is picking up, especially via basketball and tennis. Football doesn't have the same results because bettors have all week to place their wagers, he says. The myriad of NFL prop-betting options, roughly 200 per game, more than 2,000 in an NFL weekly slate of games, may be enough to satisfy bettors before the game.

Meltzer touts Bet Builder and Multi-Builder as vehicles to entice bettors.

"We developed our Bet Builder product to give players an even more engaging sports betting experience," he says. "We've further iterated on this concept to launch the Kambi Multi-Builder. Developed to give players a unique level of control over their sports betting experience, the feature enables them to combine several in-event combinations across multiple events and sports into a single bet for the first time.

"This gives players a new level of freedom to build unique bets with unlimited possibilities, while also driving enhanced margins and retention for our partners."

Throughout the industry, officials celebrate the emerging sports-betting world. It continues to surpass expectations and provide magical new wrinkles.

Top of their Game

IGT PlaySports marks the company's position as a U.S. market leader for flexible B2B sports betting platform technology, high-performance hardware options and turnkey business solutions. The company has been providing sports betting solutions for more than 10 years in Europe, Latin America and Asia, and processed more than \$12 billion in 2018 sports wagers.

It was quite ready to accommodate the United States market, a fact lauded by Charles Cohen, PlayDigital vice president, sports betting.

"IGT is well-positioned in the U.S. sports betting market," Cohen says. "The PlaySports solution is powering some of the most successful, high-volume sports betting operations in the U.S. and we have the technology, expertise and relationships to continue expanding our footprint.

"IGT's CrystalBetting Terminal is just now hitting casino floors, and it offers a VIP sports betting experience unlike anything previously seen in the U.S. The coming year will be exciting for IGT PlaySports, and we look forward to helping more of our customers get in the game and experience all the amazing benefits of adding sports betting to their current offerings."

The sector has made a major leap within the IGT hierarchy.

Cohen says the company is as serious about sports betting in the United States as it is about lottery, gaming and systems. IGT has made significant investments and obtained complete commitment from within all levels of the company, Cohen adds. The company's range includes state lottery to multi-state operators and most points in between.

Within the PlaySports umbrella, he touts the PlaySportsPod and



"The PlaySports Pod and PlaySports Bank

are about choice—providing our customers with choice for how and where they offer sports betting to their patrons."

—Charles Cohen, PlayDigital Vice President, Sports Betting, IGT



PlaySports Bank Pod features, with three intuitive self-service betting kiosks topped with high-definition multimedia displays that can showcase a range of content including live sporting events, betting odds, line and game day feeds. The PlaySports Bank is designed to go against a wall, while the PlaySports Pod can be deployed in a stand-alone setting.

"The PlaySports Pod and PlaySports Bank are about choice—providing our customers with choice for how and where they offer sports betting to their patrons," he indicates. "These two hardware configurations can be a property's entire sportsbook, or they can augment an existing offering by simply extending sports betting to another part of a resort such as a casino, restaurant or lounge.

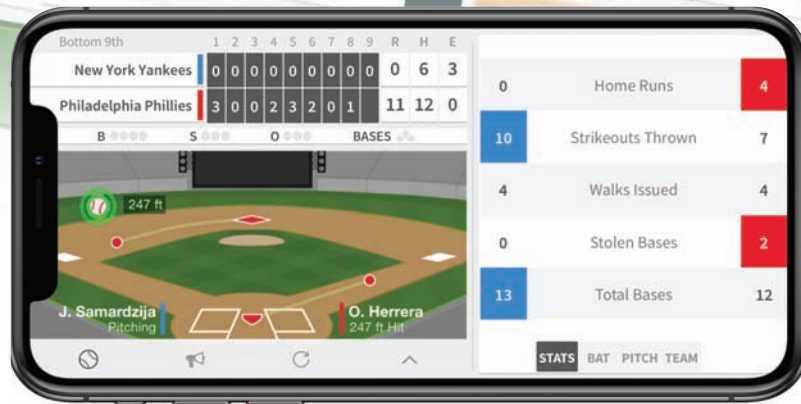
"I don't view the various self-service options as competition to each other, just more choices and convenience for the player. A sports fan who places a wager on a smartphone often has different expectations of the experience than a player who wagers at a retail counter or via a PlaySports kiosk."

These products are essentially "sportsbooks in a box," offering all the functionality of a retail sportsbook lounge. The height of the product helps draw players to the hardware, and the displays clearly communicate that the devices are sports betting destinations.

"With convenience-driven consumers, the experience is critical," Cohen says, "and we're confident in the quality of the sports betting experiences all our technology delivers. The kiosks within these hardware configurations are the same kiosks being leveraged by some of the most successful sports betting operations in the U.S."

"The PlaySports Pod and PlaySports Bank are both self-service sports betting peripherals, as is the PlaySports Pad," Cohen adds. "They are ideal for different types of players in different scenarios. The same is true of the VIP CrystalBetting Terminal that we've developed. When an operator deploys a combination of these technologies, the PlaySports platform will enable a seamless player experience with real-time data updates across devices and channels."

Cohen considers the PlaySports Bank and PlaySports Pod ideal for small- to mid-sized casinos eager to participate in the U.S. sports betting market but not in a position to make significant capital or floorspace investments.



Open Season

For Scientific Games, the hits keep on coming.

The company provides sports betting technology and services to global regulated markets through its Digital Sports Betting and Lottery groups. A global corporation with a rich history in betting, lottery, and responsible gaming initiatives, the company is uniquely positioned to provide operators with its world-class OpenSports solution. Scientific Games has provided sports betting solutions in countries around the world since 1998 both through its Lottery group and OpenBet, which Scientific Games acquired in 2018.

In 2019, the company launched OpenSports, a full suite of sports betting solutions that allow customers to mix and match technologies that suit their sportsbook needs. OpenSports is live with customers in six regulated states with more on the way.

In 2020, Scientific Games will continue to keenly focus on launching in new markets across the globe, including new U.S. states as they regulate sports betting, officials say.

Keith O'Loughlin, SVP sportsbook and platforms for Scientific Games, is bullish on the direction of the sector.

"It's ever-changing, but in the best possible way," he says. "Sports betting is on the rise, and the general dynamic is one of excitement and growth. In 2019, I think the launch of sportsbooks in multiple states was one of the most pivotal developments, which led—and continues to lead—to globalization of sports that were once more regional.

"American football, for example, is making waves globally in ways it's never done before, reaching new international audiences. Tennis is growing in popularity, too. I expect that trend to continue in both ways, with sports making their way to new demographics, using betting as a vehicle to get there."

Scientific Games plays multiple roles in this formation.

"We're one of the world's leading suppliers, so we're powering a lot of sports betting growth through our customers," he asserts. "We're exceeding market needs by giving operators a full-stack solution that includes components and services they can take or leave as needed. So instead of our historical 'one size fits all' model, we've broken down our product into its components and are now offering those individually.

"In a market where regulations, operators and bettors differ greatly, this

"Match HQ is my personal favorite part of this product family. We launched it earlier this year and it's been very successful, a line of scoreboards to give bettors real-time data that helps inform betting decisions. The data, displayed succinctly in a scoreboard widget, includes current score, play-by-play animations, commentary, and in-play team and player statistics."

—Keith O'Loughlin, Senior Vice President, Sportsbook and Platforms, Scientific Games

is the ideal approach because it empowers us to bring sports betting to any type of partner who wants to make a splash in the industry."

O'Loughlin considers the company's wide-ranging service menu a strong market presence.

"Under the OpenSports banner, we offer OpenEngage, our digital front-end solution designed to fit the needs of the U.S. market. It includes multiple features that allow bettors to take full advantage of the diverse betting options available.

"Match HQ is my personal favorite part of this product family. We launched it earlier this year and it's been very successful, a line of scoreboards to give bettors

real-time data that helps inform betting decisions. The data, displayed succinctly in a scoreboard widget, includes current score, play-by-play animations, commentary, and in-play team and player statistics."

O'Loughlin says the Match HQ rollout has seen the company's partners benefit from immediate uptake in betting volumes due to the enhanced betting experience. There was more than 25 percent increase on in-play NHL bets in Week 1 of product rollout, moving up to a 33 percent increase in Week 2, according to O'Loughlin. Across all sports, in-play betting rose by 15 percent by Week 2 of Match HQ being made available to players.

O'Loughlin says operators have several ways to utilize the product and technology.

"Match HQ is a front-end widget within our portfolio that enhances the user experience. The operator uses it as part of a sports betting integration and offers it to players on the front-end user interface. For operators, it's a revenue driver because it gives players more reason to explore the app and place bets based on the information available to them.

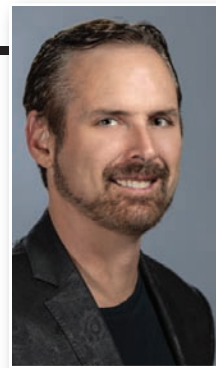
"The gambler would use the Match HQ widget as a second screen during his viewing of any given game or match. It gives him access to granular real-time stats and play-by-play tracking."

What's the magic of Match HQ?

"It brings in-play betting to the forefront of the sports betting experience," O'Loughlin maintains. "It amps up the excitement of any given game or match by giving bettors a prime selection of data on which they can make their betting decision. It's a top-tier curated content portal that gives sports betting enthusiasts one-touch access to crucial information."

When Wild Meets Mild

To be successful, be yourself



By Roger Snow

Carmen Ronzonni was soooooo wild. How wild was he? He was so wild that he couldn't throw a strike from 5 feet away. Underhanded. With a beach ball. He was so wild that he wouldn't hit the broad side of a Humvee with handful of lug nuts. He was so wild that if he was paddling around a lake in a canoe, and the canoe tipped over, and he fell out of the canoe...

...He'd miss the water.

Ronzonni, the Brooklyn-accented, jeans-with-a-belt wearing pitcher in the 1977 film *The Bad News Bears in Breaking Training* (the SMH sequel to the LOL original) just couldn't get the ball over the plate. Inside. Outside. High. Low. Bouncing them like a cricket bowler. Airmailing them like a grenade launcher.

Incoming!!!

And as the Bears barnstormed their way from the Los Angeles sandlots to the Houston Astrodome, in a psychedelic Scooby Doo van driven by a 13-year-old, to play in the, uh, championship game of something or what not, they needed Ronzonni to get his \$#%@—the kids swear a lot in the movie—and his fastball together.

Ronzonni's malfunction was all in his mind. Because he couldn't make it up, couldn't decide which wind-up and which leg kick and which delivery from which big leaguer he should imitate. Ooh, maybe Louis Tiant of the Boston Red Sox. Or Catfish Hunter of the Oakland A's. Or Warren Spahn of the—wait, didn't he retire before these kids were even born?

Then, the day before the big game, his coach had had enough.

"Listen," he says. "Cut out the bull- \$#%@ wind-ups." (The adults swear a lot in this movie, too.) "Forget about Warren Spahn and Catfish Hunter. I want to see you throw the ball like Carmen Ronzonni."

Which he does.

For a strike.

And then again.

For another strike.

And again.

Strike three.

Turns out Carmen Ronzonni wasn't flashy or flamboyant after all. His style was simple and straightforward, with very few moving parts—the Wankel engine of pitching motions. But it got the job done. And now, thanks to that ass-chewing, Ronzonni was able to be himself, be accurate, and with a little help from his teammates—not to mention the screenwriter—be the winning pitcher in the, uh, championship game of something-or-whatnot.

In business, as in baseball, you must resist the urge to ape (as in mimic), or cat (as in copy). Don't co-opt someone else's dress, his or her behavior, speaking affects, mannerisms, etc. Not only does it not work, it backfires. Right in your face.

Here's why:

NO FOOLING!

People think people are dumb. That they don't notice your pepper hair and your salt goatee. That they don't see your toupee or your comb-over. That they don't know that you know that they know that girlfriend half your age looks at you like an ATM.

An ATM with a family history of high blood pressure.

They notice. They see. And they know.

And they do, they do, they do when you start turning into the mini-me of your boss. They'll roll their eyes when you roll into the parking lot with the same car as her, as if there was some kind of BOGO at BMW. They'll shake their heads when you start dressing like him or talking like him. And oh, they'll goof on you right out in the open, but you won't realize it because your head will be stuffed so far up...

Well, you get the point.

Imitation may indeed be the sincerest form of flattery, but when it goes too far, it becomes the sincerest form of douchery.

To paraphrase Nike, just don't do it.

GO A LITTLE WILDE

Take some advice from Oscar Wilde, the 19th century London playwright known less for his

characters and conflicts than for his quips. "Be yourself," Wilde said. "Everyone else is already taken."

True that.

Co-workers and customers will forgive you if you're a little rough around the edges. That you aren't pitch-perfect in every pitch. That you commit the occasional assault and battery on the King's English. Yes, they will forgive imperfection, over and over and over.

But what they won't forgive—not even once—is dishonesty, a counterfeit character. Trying to be something or someone you are not. People can smell that you-know-what a mile away. And that label, the label of a phony, a poseur, might as well be branded onto your forehead. That's how obvious it is to detect.

The good news is that being yourself, in some respects, is easy. You do it all the time. Around friends, around family. When you're alone in the car, belting out the lyrics to some song you'd never admit to actually liking.

It just takes courage to take that person out of the car and into the office.

If you're funny, be funny. If you're not, don't try to be. If you're a Dockers kind of guy, don't roll into work in an Armani suit. If you're a numbers nerd, straighten out that pocket protector and be proud. And if you're not 100 percent fluent in the language, don't try to sound like you swallowed a thesaurus. You'll come across in a manner that's, paradoxically, diametrically opposed to the true nature of your benevolent intentions.

Uh, see what we mean?

"I y'am what I y'am," to quote another wise—albeit dead—philosopher, this one with a corn cob pipe and forearms like hamhocks. Stay true to yourself, and you will become the imitator rather than the imitator.

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.

ICE London Kicks Off With Esports Tournament

World's largest gaming trade show expected to welcome more than 30,000 visitors

The 2020 version of ICE London will be very different from past shows. And that difference will be apparent right from the start. Kicking off ICE 2020 at the ExCeL Exhibition Centre in London will be an eSports tournament featuring eight teams competing for a \$250,000 prize.

The top-tier global esports team Natus Vincere (NAVI) has been confirmed as one of the participants.

Taking place within an 800-square-meter, state-of-the-art esports arena at ExCeL London, the tournament will be broadcast live to an online global audience in excess of 5 million, and NAVI is just one of teams in the running for the Counter Strike (CS:GO) prize.

The groundbreaking initiative, which is being undertaken in partnership with GG.Bet, will be the first of its kind at an industry exhibition, according to Clarion Gaming's Head of Esports William Harding. It's set to be a "one-stop shop to learn and experience everything about esports," featuring a custom-built stage for live matches, an educational auditorium, commentators, partner Data.bet lounge, a themed bar and a betting hatch (esportsbook), allowing players to "bet" ICE and GG.Bet chips in order to simulate real esports wagering.

Commenting on the signing of NAVI to the tournament and the new fea-



ture's estimated impact on ICE London's audience, Harding explained, "With our esports tournament being broadcast live to an online global audience, we're expecting to see the number of people experiencing ICE London 2020 to grow heavily.

NAVI is a top-tier esports team, having successful teams in lots of popular titles such as League of Legends, CS:GO, Dota 2 and Fortnite, and was the first in CS:GO history to win three major tournaments in one calendar year. They have an unprecedented connection to their fans, with over 7.5 million followers across all social media channels, and have won over \$10 million in several esports games. They're considered as one of the favorites for the ICE esports arena competition."

Vox Victories

ICE VOX, the unique conference program produced at ICE 2020, will also have some new features. With sessions

on Monday and Tuesday, February 3 and 4, ICE VOX is the international conference for gaming, delivering uniquely broad content for key stakeholders across the international gaming industry. As part of Clarion Gaming's complete package solution for learning and intelligence, ICE VOX 2020 promises to deliver a fresh new conference featuring new, high-profile speakers from a variety of global industries, opening up a wider spectrum for sharing experiences and more diverse opinions.

Through a series of conferences, ICE VOX is the content hub for exclusive learning, discussions, debates and problem-solving, giving delegates the chance to "look into the future" and experience the latest thinking across two days of comprehensive learning with streams titled Modernizing Lotteries, Hospitality Technology, Marketing & Advertising, Cybercrime & Security, the World Regulatory Briefing and the International Casino Conference.

Clarion Gaming Managing Director Kate Chambers expects attendance from 30,000-plus industry professionals representing around 150 nations.

Chambers has overseen the development of the ICE London brand, which has undergone a transformative 73 percent increase in attendance from 20,829 visitors in 2011 to 36,093 in 2019, a period in which net floor space more than doubled from 20,000 square meters to 47,500 square meters. She says ICE London is the perfect opportunity to celebrate all things that are positive about the industry.

"ICE London has served as the backdrop to so many success stories, whether it's the launch of products or services that have literally transformed the way the industry does business or landmark sales and business anniversaries," she says.

"There have also been many personal milestones celebrated at ICE such as years spent working in the industry, or for that matter, years attending the event!"

—By Patrick Roberts

Great Hospitality at ICE

The trend toward non-gaming amenities and hospitality-related technology will be a focus at ICE this year.

Land-based gaming has to keep up with customer demands and create a seamless experience for visitors while they enjoy the products and services offered to them. But they're not just demanding bigger and better games—they want to feel like VIPs in their environment. For operators, that means focusing on how to make that experience even better through hospitality.

Innovative technology is available right now in abundance. VOX's new track will focus on those new technologies, assess which ones should be implemented, and break down how to create that complete experience for visitors, old and new, while creating a more sustainable revenue stream for business.

The hospitality track will focus on how casinos can attract more customers by innovating available floor space. Topics at the ICE Hospitality track will include:

- What integrated resorts and the gaming industry can learn from other industries' design and innovation solutions
- Non-gaming partnerships and licenses—are they a driver or obstacle to extra value and revenue?
- Industry disruptors: technology, retail and entertainment innovations to wow your gaming and non-gaming guests
- Gaining a share of the MICE market by excelling in hospitality
- How hospitality technology can reinvent casinos

Own Your Data, Control Your Machines

Product: CyberMax
Manufacturer: Acres 4.0

Acres 4.0's CyberMax gives casinos real-time, direct access to read and write data to the slot machine, without affecting the performance of the existing player tracking system. With CyberMax, casinos collect exponentially more data than ever before and can instantly trigger real-time bonuses, jackpots and messaging delivered to the player right at the game.

CyberMax consists of two primary hardware components, appropriately named "Cyber" and "Max." Cyber is a processing unit that connects up to eight slot machines and typically resides in the slot bank.

Max is a revolutionary thumb-sized SMIB that plugs directly into the slot machine's SAS port and collects 100 percent of the SAS protocol in real time. (CyberMax actually gives detailed data on each game spin.) All data is encrypted and sent to a new database completely owned and controlled by the casino operator.

The ability to collect, analyze and trigger actions based on underlying spin-level data will have wide and long-lasting implications on how casino players are treated. For instance, data collected by CyberMax shows that 41 percent of all slot machine cash-outs occur at the longest losing streak of the session. Armed with that data, operators can leverage CyberMax's bonusing abilities to predict the moment of player dissatisfaction and intervene with a timely bonus opportunity. The opportunities to learn and



profitably react to real-time player behavior are boundless.

Acres 4.0 provides a wide variety of interface controls, enabling casinos to securely share relevant data with desired application providers. For years, casinos and application developers have faced the daunting roadblock of data access. Acres 4.0 has removed that roadblock and replaced it with secure access to a data set richer than anything ever seen in the casino gaming industry.

For more information, visit acrescybermax.com.

Performance Insight

Product: DataTrac
Manufacturer: Table Trac, Inc.

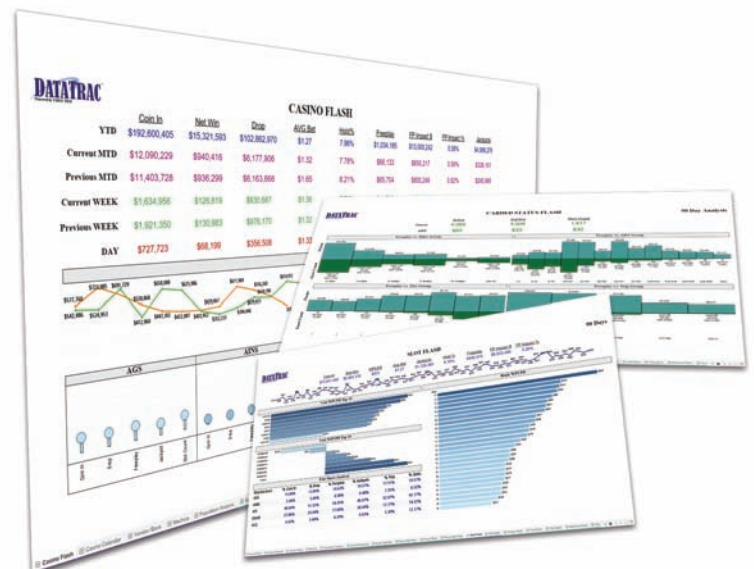
Table Trac, Inc. maker of the CasinoTrac Casino Management System, has announced the addition of DataTrac to the casino management solution.

DataTrac provides valuable in-depth insight to the performance of the slot floor, pit and player performance, in addition to measuring the success of current promotional strategies. Using easy-to-read visualizations and dashboards, DataTrac empowers users to get the most out of their data.

Keeping a property's information safe and secure is the top priority of systems, and DataTrac does just that. Users can enjoy peace of mind knowing that all data stays on the property with no need for third-party vendors or cloud services.

DataTrac is fully integrated into the CasinoTrac casino management software, giving users the information they need to make decisions in real time.

For more information, visit tabletrac.com.



WILLIAM HILL BUYS CGT

The circle was closed in November when William Hill bought what was left of CG Technology (formerly Cantor Gaming), bringing to an end the tortured history of an early entry in the U.S. sports betting market.

The deal strengthens the hold William Hill has on the Nevada sports betting market since it brings sportsbooks to the Cosmopolitan, the Venetian and Palazzo, the Palms, the Tropicana and Silverton, as well as providing a betting platform and risk management consulting to the Atlantis on Paradise Island in the Bahamas.

Joe Asher, CEO of William Hill US, worked for Cantor Gaming at one time. He was the subject of a lawsuit after leaving Cantor and forming a sports betting company called Brandywine Bookmaking. William Hill purchased the company and named Asher CEO of its U.S. division, prompting the lawsuit, which was later dismissed.

Asher said the deal to acquire CG Technology was good for William Hill.

“We are pleased to have reached this agreement,” he said. “This will allow us to expand our Las Vegas footprint to several marquee resorts. We look forward to working with our new casino partners and transitioning CG Technology’s retail and mobile customers to our award-winning offering.”

William Hill operates 113 race and sportsbooks in Nevada. The company also operates sports betting operations for casinos and racetracks in 10 of the 13 states where sports betting is legal.

More importantly, William Hill has a deal with Eldorado Resorts to operate sportsbooks in all its U.S. properties, which will soon include all the Caesars Entertainment casinos on the Las Vegas Strip and elsewhere once the deal to acquire that company is closed.

The story of Cantor Gaming and CG Technology is long and convoluted and includes fines and settlements approaching \$30 million for missteps in made in Nevada.

Current CEO Parikshat Khanna said the company was “happy to reach an agreement for the sale of the race and sportsbook assets of CG Technology to William Hill and looks forward to a seamless transition for our loyal casino partners



William Hill US
CEO Joe Asher

and customers.”

As for Asher, it solidifies William Hill’s position as the leading sports betting operators in Nevada. William Hill CEO Ulrik Bengtsson said the cost of the acquisition was “not significant” and the deal was pending approval of regulators in all the pending jurisdictions. William Hill expects it to close in the first half of 2020.

HARD ROCK LAUNCHES GAMING LITERACY, EDUCATION PROGRAM



Hard Rock International has launched PlayersEdge, a gambling literacy and education program that is the first of its kind offered by a U.S.-based company for markets in North America and internationally.

It is designed for veteran players and newbies—anyone who might be at risk for gambling addiction. It also offers game facts and etiquette and helps players understand their own behavior and develop positive playing habits.

For those who can’t limit themselves, the program helps players find help and voluntarily exclude themselves from casinos.

The program will be implemented at all Hard Rock and Seminole Gaming properties.

Paul Pellizzari, vice president of global social responsibility for Hard Rock, commented, “We built PlayersEdge by listening to gamblers. We want to communicate the right information by appealing to how they actually think and behave in casinos.” He added, “By understanding the risk profiles and experience levels of different player types, we can segment and target information more precisely, bringing a new focus on preventing problems before they start.”

The program employs a mix of media from print to digital, web, social and live.

“We want players to become confident and to talk openly about gambling—with each other, their families and their friends. We want dialogue on what’s healthy and fun and what’s risky. Our employees are critical to this change,” said Pellizzari.

PlayersEdge will also provide the background and foundation for training employees to recognize problem gambling. The online training program “Frontline Fundamentals” will help employees recognize and interpret player behavior on the casino floor.

Another tier of training, called “Supervisor Support,” will be offered for supervisors and managers. It will employ role-playing and scenarios drawn from real life and use clinicians and problem gaming experts from the Florida Council for Compulsive Gambling.

IGT’S COBALT 27 CABINET DEBUTS AT SAGSE

International Game Technology debuted its new Cobalt 27 cabinet at SAGSE Buenos Aires in Argentina in November. The company also featured its latest portfolio of exciting player-tested content at the show.

“Our new Cobalt cabinet and its extensive library of player-tested, market-attuned games underscores our commitment to increasing performance and diversifying entertainment on our Latin American customers’ gaming floors,” said Walter Bugno, IGT CEO, international. “Our offering at this important show reaffirms our dedication to the region by demonstrating how IGT’s solutions deliver outstanding player experiences that can drive our customers’ growth.”

The Cobalt 27 cabinet represents IGT’s commitment to design that enhances player engagement. Clad with two high-definition 27-inch screens, a 24-inch video topper, integrated cabinet lighting, and Dynamic Player Panel with dual bash buttons, this cabinet is designed to fit operators’ unique needs and forge new opportunities for their gaming floors. Its universal appeal is enhanced by its advanced ergonomics and a built-in external USB charging port.

The Cobalt 27 cabinet is available with IGT’s full library of proven content, including the Star Goddess theme, which generates excitement with its Stars of Wealth feature and mystery progressive jackpots, while the Temple of Fire Cash Eruption game includes a hold-and-re-spin feature that can be triggered from both the base game and free games.



EVERI HOLDS PUBLIC STOCK OFFERING

On December 10, Everi Holdings Inc. announced the completion of an underwritten public offering of 10 million shares at a price of \$11.25 per share. The



company, a premier provider of gaming products, financial technology and player loyalty solutions, also granted underwriters a 30-day option to purchase an additional 1.5 million shares of common stock at the public offering price, which the underwriters exercised in full.

Total net proceeds for the offering were approximately \$123 million after underwriting discounts but before estimated offering expenses payable by the company.

The company intends to use the net proceeds from the offering to refinance a portion of its existing indebtedness in one or more transactions, which may include the repayment of certain outstanding borrowings under the company's existing term loan facility and/or the redemption and/or repurchase of a portion of its outstanding 7.5 percent senior unsecured notes due in 2025. Pending the deployment of the net proceeds for such refinancing transactions, the company may invest the net proceeds in short-term, interest-bearing, investment-grade securities.

SYNERGY BLUE TO ENTER ASIA PACIFIC MARKET

Skill-influenced slot supplier Synergy Blue has announced an agreement with local distributor Jade Entertainment Solutions to launch the Synergy game library in Asian Pacific markets, where Jade Entertainment will provide sales, distribution and localized support for the company's unique HAWG (Hybrid Arcade Wager-based Gaming) platform and arcade-style casino games.



"This agreement is a great step for Synergy Blue, and we're very excited to work with Jade Entertainment, who are experts in their market," said Synergy Blue CEO Georg Washington. "New trends are driving innovation in entertainment worldwide, and gambling preferences are evolving to reflect that. Providing a variety of new experiences with the quality and engagement level that players now expect is crucial. This is what our game library was built for, and we're excited to expand our offering to the Asia Pacific region."

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Japan, Sneaker Con and Mr. Vegas

Boy, I can't wait to go to Floyd Mayweather's casino in Okinawa. It's going to be a hoot.

The legendary former boxer and current promoter has reportedly bought a place in Tokyo, from where he plans to bid for a "casino empire" on the island of Okinawa.

The Sun in the U.K. quoted Hong Kong boxing promoter Jay Lau as saying Mayweather "came to Tokyo to set up TMT Japan ("The Money Team," his promotion company) because of the Japan casinos that open in the next year. There are casinos opening in Cambodia, Singapore and China as well. It means boxing will get more and more popular."

I'm guessing that by now, someone's told Mayweather there won't be a casino opening in Japan for at least five years, and probably longer, and that there are no casinos opening in Cambodia, Singapore or China next year either—and, of course, that the local government in Okinawa has ruled out casinos.

Man, I hope Floyd didn't sign the papers yet. And for the record, I wouldn't want to be the one who told him all that stuff about Japan. From what I understand, no one's told him to this day he lost the Olympic qualifier to Augie Sanchez in 1996.

He never lost another fight. So, here's wishing you all the best with Casino Okinawa, Floyd.

Speaking of the Land of the Rising Sun, MGM Resorts Japan is already anticipating its future role as operator of one of the new market's integrated resorts, ramping up some early convention business. In November, the operator served as the main sponsor of Sneaker Con Osaka 2019—one of more than 30 annual events in the Sneaker Con tour, which includes events in cities from New York to London to Shanghai, Sydney and, of course, Toronto.

MGM picked Osaka for the first Sneaker Con in Japan because it "is a city with a vibrant culture of street fashion," according to MGM Resorts Japan President Jason P. Hyland.

I'll never forget my first Sneaker Con. It was in Burma. I wore Converse All Stars.

In other gaming news, Hackaday, a sort of blog for software and hardware hacks, published pictures of a "Slot Machine ATM" one of the engineers in their little blogosphere invented. It has three reels, and you put in your PIN and the amount of cash you want. The reels spin to matching symbols, and the amount comes pouring out of a hopper just like coins did in the old-timey slot machines. Your friends laugh with glee at the "guaranteed jackpot."

So, if I've got this right, somewhere, maybe in some casino, there

will be an ATM with reels and a handle, and I can get my \$400 of gambling money in quarters. Then, I can scoop all the coins into a bucket and lug them to some cashier, providing there are still cashiers that are equipped to pour a bunch of coins into a contraption and come out with a cash-money figure.

Why, it puts the drudgery back into slot play! How smart! They should set up a bus service in New York, give passengers each a roll of quarters, and ride them to Atlantic City to get money from the Slot Machine ATM.

OK, I know. I'm sure the invention is not meant for widespread commercial release. From what I can tell, it's something some tekkie built in his garage and put up on Hackaday, to amuse fellow tekkies of a similar bent. It does prove one thing, though. There are a lot of people in today's world with way too much time on their hands.

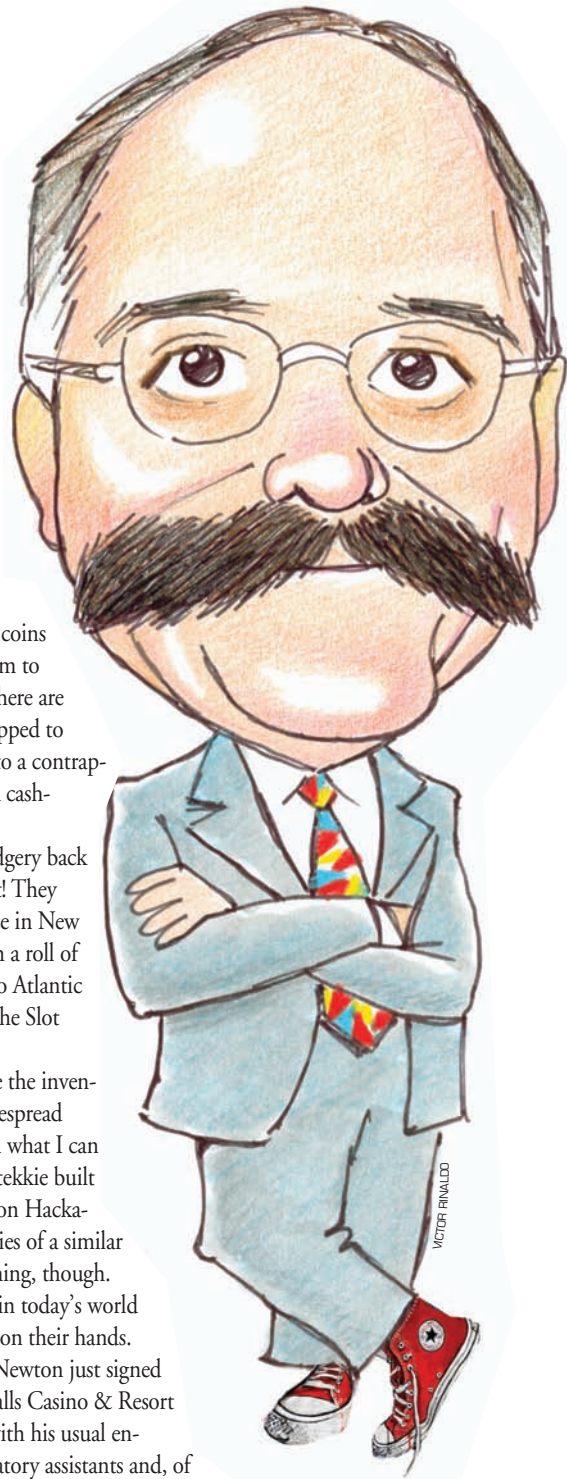
Finally, I see Wayne Newton just signed to appear at the Grand Falls Casino & Resort this year. He will arrive with his usual entourage of nurses, ambulatory assistants and, of course, his pearl-handled walker.

Oh, I'm kidding. Though he's 77, Newton's a perpetual youngster (compared to, say, Keith Richards)—and he's a bona fide legend of casino entertainment. I read that he's performed more than 25,000 shows in Las Vegas alone (in one week, mind you), so he deserves his widely repeated "Mr. Las Vegas" moniker. Now, of course, he will also be known as "Mr. Iowa."

Hey, the guy's put out 165 albums and counting, he still does a Vegas show and he still performs around the country.

I'm 14 years his junior, and I'm lucky I can get my shoes on in the morning.

I wonder if Wayne will play Floyd Mayweather's Okinawa casino.



PEOPLE

CNIGA ELECTS NEW CHAIRMAN, EXECUTIVE BOARD

The California Nations Indian Gaming Association (CNIGA) has elected a new chairman and executive board members.

The largest association of gaming tribes in the Golden State elected James Siva as chairman, Mike Lopez as vice chairman and Isaiah Vivanco as treasurer.

Siva said, "I am deeply honored to be elected chairman of CNIGA and am proud to lead an organization with such a robust history." He added, "I am deeply grateful to have this position and fortunate to have great leaders to work with and learn from."

Also noteworthy: The Pechanga Band of Luiseño Indians, operators of the largest casino resort on the West Coast, rejoined the organization after several years' absence. Pechanga Chairman Mark Macarro declared, "We're excited and pleased to again be part of CNIGA, and clearly we have big, impactful and consequential issues to address collectively."

WILMOTT MAKES WAY FOR SNOWDEN, OTHER CHANGES

Penn National Gaming Inc. has announced a new organizational structure for its executive management team to coincide with the transition of Jay Snowden to the role of chief executive officer January 1, following the retirement of current CEO Timothy Wilmott.

Wilmott announced his retirement plans in August. In an interview with CDC Gaming Reports in October, the 62-year-old CEO said he promised his wife he would stop working when their daughter was grown. He also said the time is right for Snowden to step in.

"If I had stayed a couple more years, Jay could have left and gone somewhere else to get a CEO job," Wilmott said. "Jay and I have known each other 18 years. We worked together at Harrah's. Jay's got a lot of running room now, and at 44, he's going to be able to steer this company forward for a lot of years."



James Siva



Jay Snowden

The reorganization includes the promotion of Todd George to executive vice president of operations and a change of title for Chris Rogers to senior vice president and chief strategy officer. Some of the moves are subject to regulatory approval.

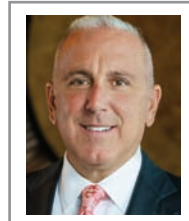
George joined Penn National in October 2012 as vice president and general manager of Hollywood Casino in Lawrenceburg, Indiana. In 2014, George transitioned to the role of vice president and general manager of Hollywood Casino St. Louis. In 2017, he was promoted to his role as senior vice president, regional operations, overseeing nine properties in the company's Midwest Region.

Rogers joined Penn National in August 2013 as vice president and deputy general counsel. In February 2019, he was promoted to senior vice president, corporate development.

ST. JEAN NAMED COO OF CALIFORNIA CASINO RESORT

Richard St. Jean has been named chief operating officer of the Morongo Casino Resort & Spa near Palm Springs, California, according to the Morongo Band of Mission Indians. He succeeds John James, who departed to take a similar position at Foxwoods Resort Casino in Connecticut.

With more than 25 years of hospitality and casino experience, St. Jean is "uniquely qualified to steer the Morongo Casino Resort & Spa forward to realize the substantial growth opportunities that lie ahead," the announcement stated.



Richard St. Jean

GLEBOCKI NAMED CEO OF ATLANTIC CITY'S OCEAN RESORT

The former chief financial officer of Ocean Casino Resort in Atlantic City has become the next CEO of the property.

Terry Glebocki, with three decades of financial experience, worked in management at Ocean's predecessor, the \$2 billion Revel casino, which opened in April 2012 and closed in September 2014.

Glebocki succeeds Eric Matejevich, who served as interim CEO for most of 2019. He in turn replaced Frank Leone, who was let go in February after Luxor Capital acquired the fiscally troubled casino from developer Bruce Deifik. Deifik died in a car accident in April.



Terry Glebocki

IGT CFO FORNARO STEPS DOWN, RISHTON INTERIM REPLACEMENT

London-based gaming supplier International Game Technology Plc. announced the resignation of Alberto Fornaro, executive vice president and chief financial officer, who is leaving "to pursue other professional opportunities."

IGT's board unanimously approved Timothy Rishton, the company's senior vice president and chief accounting officer, to replace Fornaro as interim CFO.

Fornaro will continue in his current position through January 31, 2020, to ensure a smooth transition for the company.



Alberto Fornaro

KLEBANOW LEAVES GMA

Andrew Klebanow, senior partner at Las Vegas-based gaming consultancy Global Market Advisors, departed the company he helped to found in 2005 and start his own company, Klebanow Consulting.

Klebanow has more than 40 years in the hospitality industry and primarily worked on marketing plan development, focus groups, and player reward programs.



Andrew Klebanow

GGB

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Jim Allen

Chairman, Hard Rock International & CEO,
Seminole Gaming



Responsible for all gaming, hospitality and entertainment operations at the Seminole Tribe of Florida since 2001, James F. Allen has guided the development of Seminole Gaming into one of the world's most successful casino and integrated resort operators, with six casino sites located throughout Florida, and many other around the world.

Allen led the tribe's 2007 acquisition of Hard Rock International, the first acquisition of a major international company by a North American Indian tribe. Within two weeks in late October, Allen opened four properties: Hard Rock Los Cabos, the Guitar Hotel at Hard Rock Hollywood in Florida, an \$800 million expansion at Hard Rock Tampa, and Hard Rock Sacramento.

He spoke with *GGB* Publisher Roger Gros during the opening of the Guitar Hotel in October. To hear the full interview in a podcast, where Allen talks about New Jersey, more Hard Rock expansion and a possible Las Vegas property, visit GGBMagazine.com.

GGB: Tell us about the new Guitar Hotel and what it means to the company and your customers.

Allen: We've got \$1.5 billion in this expansion. Our customers have been so loyal and tremendously supportive of what we do here. But they were very patient. One day a wall was here, the next day it's over there. We moved restaurants around, we moved roads. So to put all this major construction behind us is great for the property, but more importantly, for our guests.

The original facility was beautiful and we had a lot of success with it, but we wanted to create something that was more of an integrated resort—something more than just a locals casino. That was the goal and the budget mirrored that thought process, and hopefully the guests will love it.

Very humbly, we've had a lot of success with this business (both Hard Rock casinos in Florida) since I joined. Our business has increased more

than 1,000 percent. We truly needed more rooms, so we looked at the options of a standard hotel tower or something different. We were trying to make a major statement.

When I came up with the idea to buy Hard Rock, I explained to the tribe that this is a long-term commitment. It will take time to grow the brand. We knew we had some work to do. This building has become the iconic statement. The tribe owns Hard Rock and we're creating something we want the whole world to see. And now the brand is coming up on its 50th anniversary.

How difficult was it to build this hotel?

I went to the legendary structural engineer DeSimone Consulting Engineers. I know Vince DeSimone back from my days with Kerzner and Trump. He called me up and asked me if I was out of my blanking mind—how we were going to design a building that has structural integrity in the shape of a guitar? But it worked out and it looks great!

How were you able to open all these projects so quickly?

We're a glutton for punishment. We just finished an \$800 million expansion of the Hard Rock in Tampa. We took over Jack Casino in Cincinnati. The same day we opened the Guitar Hotel, we're opening our brand new Hard Rock Hotel in Cabo. And we'll open Hard Rock Sacramento next week.

We were really able to restructure the company. We expanded the hotel and casino divisions. We never want to forget the cafes and the relationships with our franchise partners, but the restaurant business is very difficult on a global basis.

And now you're going international with integrated resorts.

We were selected in Barcelona after a very competitive process. We're still working with the government of Catalonia, but frankly, there's uncertainty with that government again, so we'll

navigate through that. We're 100 percent committed to Spain and Catalonia.

We are competing in Athens. Two have qualified to be the finalists, ourselves and Mohegan Sun. We respect Mohegan. I worked directly for Sol Kerzner when we built it, so I know what was created there back in 1995. We know their facility and respect them, but we have a lot more experience internationally.

We're in 75 countries around the world and have been doing that for almost 50 years with experience working with local culture, government and currencies. When the dollar is strong, people think that's good for our business. The opposite is true—it's better when the dollar is weaker. When companies haven't experienced that, it's a learning curve. There's no learning curve with Hard Rock International.

How about sports betting in Florida? Is the law that says no expansion of gaming without the voters' approval going to apply?

Yes. Disney and Seminoles are two big names in the state of Florida. The voters spoke. They overwhelmingly—by more than 70 percent—said they no longer want the legislative body to be involved in gaming. They hadn't been able to make a decision or set a clear direction in how to use that \$400 million they got from us each year. The voters spoke. We're a little surprised that now (the legislature) is saying they're not going to listen to the voters. We're happy to work with the state, but their ideas seem to change on a weekly basis.

When we were discussing different options with the state last year, sports betting was 100 percent on the agenda. We weren't sure what they wanted to do with internet gaming, but we think internet gaming is the future, and any state that hasn't figured that out is making a mistake, in my opinion. So we do believe it will continue to be a topic of conversation between the tribe, the sports teams, the parimutuels and others.



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