

## OUR TOP LESSONS LEARNED FROM NIGA 2017

- 1. There is a thirst for ideas on new sources of revenue.** As gaming in many tribal jurisdictions nears or has already reached saturation, tribes are looking for new ways to support their independence and economic growth. It is clear that tribal leaders are no longer tied to the traditional casino model and are listening to new opportunities in a wide range of areas. Discussions at NIGA on this topic ranged from Cannabis to foreign development. Investment diversification is a major focus of The Innovation Group in its interaction with tribal clients.
- 2. Concepts are becoming a reality.** Skill-based gaming and social casinos are moving from emerging technologies to fixtures within casino operations. As these technologies are being adopted, operators are beginning to realize the ROI potential and are exploring ways to maximize these channels to ensure that they attract future gamers. Our gaming demand modeling is increasingly reflective of these developments.
- 3. There is uncertainty related to the political landscape.** The new administration presents uncertainty around the politics of tribal economic development, including gaming. Both the executive branch and the dynamics in the Supreme Court are motivating tribes to focus efforts on protecting their sovereign rights and understand how they can capitalize on a potential expansion of online gaming and other new opportunities.
- 4. Data dominates.** Tribes are eager to utilize big data and advanced analytics to drive more business and create fatter margins. We are seeing significant investments in analytics tools and resources so that operators can have a 360 degree view of their customers, can better understand their gaming floors, and can quantify the value of their amenity mixes. Knowing a customer thoroughly before they ever step into a facility has been a major player in the retail industry for many years and it is now moving into the casino space. Innovation Analytics is at the forefront of this effort.
- 5. Traditional gaming business is still trending upwards.** Despite how much has been said about new technologies and emerging trends in the gaming industry, traditional brick and mortar operations still generate billions of dollars annually in revenue for tribes, their membership, and the communities in which they operate. Dozens of casinos are going through expansions and/or renovations while many other tribes are still entering the gaming industry for the first time. These expansion projects require the same market research that has been the basis of financing casino development for decades.

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