

CASINO PLAYER TRENDS REPORT

# How Casinos Must Change Their Approach to Loyalty, Customer Experience, & Online Sports Betting

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*Understanding How Player Mindsets & Expectations  
Differ Across Four Unique Generations*

NOVEMBER 2022

LANE | TERRALEVER™

IN PARTNERSHIP WITH  
**Jefferies**







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*The opinions expressed throughout the report are solely those of LaneTerralever and are not those of Jefferies Group, who we partner with on the consumer research study and executive interviews.*

# Background

## Casino & Gaming Continues to Grow as Industry is Hit With Changes

With the recent surge in revenue due to the legalization of sports betting and the pent-up demand for leisure coming out of the pandemic, casino operators have expanded to new markets and generated record-breaking revenue. In 2021, the market size of the casino and online gambling industry reached a total of **\$261 billion**.

## The Pandemic has Left a Lasting Impact on Players & Casinos Alike

That being said, some brick-and-mortar operators have faced significant challenges with the rise of online gaming and the corona virus (COVID-19) pandemic. This caused many casinos to close their doors to the public for an unexpectedly long time. The pandemic forced casino operators to reshape their direct marketing efforts and how they would invest in their overall guest strategy. Despite some of these headwinds, the industry is still expected to see growth. The total revenue of casinos is forecast to increase **from 2021 to 2024** in the United States.

**~ \$725 million  
was spent on casino  
television ads in 2021, up  
from \$292 million in 2020.**

◀▶ Nielsen

# The Changing Landscape

## Online Sports Betting Impact on Casino Industry

The pandemic was, and continues to be, a shock that reverberated around the casino industry. And yet we see the resilience of the market, and the players' need to find new and engaging forms of entertainment. This physical-to-digital shift was already happening pre-COVID-19, but has been permanently accelerated by the pandemic. Casino operators have spent an enormous amount of marketing dollars focused on customer acquisition over the last few years, but as the CAC to LTV equation becomes more difficult to justify, operators must shift their primary focus to loyalty and customer experience. This will not only provide players with an unprecedented betting experience but will eventually power operators' future growth and ensure they maintain a high level of retention.

**~\$150 billion in regulated bets have been placed in the four-plus years since the Supreme Court ruled that states other than Nevada were free to establish their own sports gambling laws.**

Source: <https://sportshandle.com/national-handle-tops-150-billion/>

Source: <https://www.washingtonpost.com/sports/2022/09/27/caesars-fanduel-draftkings-commercials/>





# Purpose of Our Research

## Taking a Deep Dive Into Players & Operators

As a result of the changes we've seen in recent years, we decided to dig into the mindset of the player to gain a deeper understanding of how casino operators can better communicate with players and deliver the world-class experiences that will inspire long-term loyalty.

We partnered with Jefferies Group, an investment bank with a specialty in casinos, gaming, and leisure, and conducted a national survey of 1,384 casino players across all generations. While we partnered on the research, the opinions expressed in this report are our own. We also gathered insights and opinions from notable casino executives – and created a report that highlights key trends across loyalty programs, sports betting, and overall customer experience. We aimed to uncover any gap that may exist between what casino operators currently understand about their players and what those players tell us they seek. This report outlines the biggest insights and opportunities for casino operators and marketing executives to consider as we head into 2023.



### Consumer Survey

National Survey of 1,384  
Casino Players Across  
All Generations.



### Player Interviews

In-Depth Interviews  
With Players Across  
All Generations.



### Executive Interviews

In-Depth Interviews With  
Executives From a Variety of  
Different Types of Casinos.

# Focus on Loyalty, Customer Experience, & Online Sports Betting

## Opportunities for Operators to Shift Focus From Promos to Guest Experience

At their core, casinos are in the business of loyalty, which will become increasingly important as we are faced with a potential recession. Those with the best performances are shifting their perspective to see their role more as data-driven innovators driving guest experience, rather than just gaming and hospitality. The casinos that have started to close the gap between their in-person and online experience – as the convenience and accessibility of online sports betting continues to grow – are doing so effectively through the lens of needs by generation. They see the future with their players as an opportunity to grow their audience as generational needs evolve.

1

### Emerging Trends in Loyalty

Casino operators can build loyalty by appealing to the player's basic wants and needs.

2

### Expectations Around Customer Experience

Ongoing customer experience is now more important than ever – placing a strong focus on the player's journey will only enhance your brand.

3

### Impacts of Online Sports Betting

The legalization and rise of sports betting can further amplify your reach if it complements your current business model – revealing a new group of players.

# #1 – Emerging Trends in Loyalty

## Catering to the Right Audience

### Players Are Generally Satisfied With Casino Loyalty Programs

The casino industry has a long history of using customer relationship programs to provide a unique experience for its players. Not surprisingly, loyalty programs in the casino space are considered a critical component of a successful operation. Casinos are more advanced than other industries in terms of how they use loyalty programs, and it shows in our research. To remain successful and drive engagement, casinos must understand the players' needs and wants to guide enhancements to loyalty programs. Our report found many key identifiers surrounding players' thoughts on loyalty programs, the customer experience in both an online and in-person setting, and what drives visitation to local or destination casinos.

**67%**

of all players only belong to 1-2 casino/sports betting loyalty programs, while the rest belong to 3 or more.

**87%**

of all players say they are satisfied or very satisfied with their favorite casino loyalty program.

**65%**

will visit a casino solely because of the positive perception of its loyalty program.

# #1 – Emerging Trends in Loyalty

## Engaging Your Most Valuable Audiences

### Different Ways Rewards Are Being Used Across Generations

A casino's player rewards program is one of their strongest tools to identify its most valuable players and entice them to return to a casino time and time again. A well-designed player rewards program with targeted communications and a strong rewards mix will encourage repeat visitation, foster loyalty, stimulate play, and give an operator a competitive advantage aimed to get a larger share of wallet from existing players. A player rewards program is not only part of tried-and-true marketing strategy; it is also part of the casino's overall player experience.

**57% of all players are engaging with their loyalty program at least weekly.  
The majority of Millennials and Gen X use their rewards to play more.**



**63%**

of Gen Z engage with their casino loyalty program weekly; cares more about using their loyalty rewards on friends and family.



**68%**

of Millennials engage with their casino loyalty program weekly.



**56%**

of Gen X engage with their casino loyalty program weekly.



**33%**

of Boomers engage with their casino loyalty program weekly; prefers to use rewards on free meals and free plays.



## #2 – Expectations Around Customer Experience

### Casinos Must Deliver a Seamless Customer Experience

#### Across Online & In-Person Experiences

Casino operators have a lot to consider when looking at the end-to-end customer journey in this fast-paced industry. How operators choose to interact and connect with their guests will shape the future of their casino. First, operators must understand the need to create an exceptional guest experience instead of just great customer service. While flashy brand and marketing campaigns featuring promotions still have their place in today's world, a bigger emphasis should be put on delivering a seamless customer experience across digital and in-person touch points. The best investment that a casino can make is in its guest service and experience – both from an online and in-person perspective.



**Casinos must make the investments necessary to create a seamless online-to-in-person guest experience. Keys include implementing a shared wallet, a cohesive brand, and getting your operating teams on the same page.**

*– Nick Dan-Bergman, VP, Marketing at LaneTerraLever*

### Perceptions of Online vs. In-Person Experience:

**59%**

of all players said they feel more comfortable betting online than in-person

**64%**

of all players said they feel more entertained in-person

**59%**

of all players said they take bets more seriously in-person

# The Majority of Players Believe Technology Has Not Had a Negative Impact on Customer Experience at Casinos



**44%**

of all players believe  
technology has  
made the customer  
experience worse.



**74%**

of all players expect  
the casino they most  
frequent to have a  
mobile app.

## #2 – Expectations Around Customer Experience

### All Players Seek Personalized Experiences

#### Older Generations Are Unlikely to Give You a Second Chance

The customer journey should be viewed as a human experience. Casino players don't want to be seen as just dollar signs, but wish for a more personalized encounter. Players aren't just trying to win big; they're also in search of a social experience, whether it be at their local casino or a destination casino. At face value, the customer journey can be considered one of the fundamental drivers of a casino's overall reputation. Our report findings discovered that while Gen Z can be forgiving when they've had a bad experience, Boomers and Gen X are less likely to give casino operators a second chance to get it right.

#### Willing to Give You a Second Chance to Make Up for Bad Customer Experience:



**49%**

of Gen Z

**vs.**



**25%**

of Boomers

**35%**

of Gen Z said they believed the casino staff knew them well enough to remember things about their personal life.

**41%**

of Boomers believed the staff did not know them at all.



## #3 – Impact of Online Sports Betting

### Gen Z & Millennials Are Majority of Sports Bettors

#### Operators Have an Opportunity to Introduce Them to In-Person Experiences

Sports betting has become a mainstay of American culture since The Professional and Amateur Sports Protection Act (PASPA) was repealed in 2018. For those who already had access to sports betting, it added to the flavor of the place, but the real action was at slot machines, roulette, and other table games. Now, sports betting is surging. The expansion of legalized sports betting in many parts of the country, along with greater cultural acceptance of something once seen as a vice, has made it more and more ubiquitous. What's resulted is a younger demographic taking part in sports betting and becoming an increasingly important audience for operators to bring into the fold. With Gen Z, casino operators have the opportunity to take part in a new endeavor as this movement of online sports betting continues to take shape. Casino operators and sports betting entities must focus on this new audience of players' needs and wants.



**Sports betting is really more of an acquisition strategy and marketing tool. People are more focused on it now with more acceptance of gaming and the legalization of sports betting across the US.**

*– Todd George, Executive Vice President of Operations at Penn National Entertainment*

### What Entices People to Place a Sports Bet In-Person:

**48%**

The ability to immediately cash out winnings

**31%**

The experience of watching sports with friends/family/other players

# A Surprising Number of Gen Z and Millennials Have Only Bet Online and Never In-Person

But they also indicate they are more likely to visit a casino in-person as sports betting becomes more accessible.



**48%**

of Gen Z players  
have only bet online  
but never bet at  
in-person casinos.



**36%**

of Millennial players  
have only bet online  
but never bet at  
in-person casinos.



**70%**

of Gen Z and Millennial  
players combined said  
the legalization of  
sports betting made  
them more likely to visit  
a casino in person.

## #3 – Impact of Online Sports Betting

### Sports Bettors Are More Digital-Savvy

#### Loyalty Program Engagement Much Higher As Well

Casino operators must evaluate how they will welcome sports bettors into their existing gaming universe. The typical sports bettor has a very different set of needs than the traditional slots or table games player. Though all expect to get the most from their rewards for their play, sports bettors, particularly those of the younger generations, are seeking social gaming experiences that casinos can't miss on to retain them or even start to see the more traditional play from them. It's having the right tools to meet sports bettors where they are that can help build improved player engagement both online and in-person.



It's a good way to socialize and talk to friends who also use the app. They have made it more of a community. I have text threads and group chats just about sports gambling, and that has been a new thing in the last three years. It doesn't matter how much money we're throwing in there. There's something to talk about.

– Christopher B., Millennial Player, Colorado



Our digital business has been a losing business to date in terms of the customer acquisition phase. This is our opportunity to reduce churn.

– Tom Reeg, CEO at Caesars Entertainment



## Sports Bettors vs. Non-Sports Bettors

**70%** vs. **57%**  
Sports Bettors Non-Sports Bettors

Engage With Their Preferred Loyalty  
Program at Least Weekly

**69%** vs. **53%**  
Sports Bettors Non-Sports Bettors

Prefer to Sign Up for a Loyalty  
Program Online

**26%** vs. **18%**  
Sports Bettors Non-Sports Bettors

Have Been  
Assigned a Host

**27%** vs. **15%**  
Sports Bettors Non-Sports Bettors

Say Their Staff Knows Things  
About Them Personally

# Player Insights By Generation

## Identifying & Understanding Your Primary Demographics

A significant transition is on the rise. Key player demographics are shifting dramatically and have been instead accelerated due to the pandemic and legalization of sports betting. Although they share a mutual interest in gaming, not all casino-goers are the same. It's safe to say that each generation has contributed – and continues to contribute – to the change in attitudes in casino gaming. With a focus on the younger generation, it has become clear that this generation is demanding vital changes to their customer experience. Though similar in some ways to their younger counterparts, we also found that older generations have a few notable differences that have molded this group into what they are today.

Our main goal was to identify the different players' interests and give insight as to what the current and future customer likes and dislikes, helping operators cater to each group in a unique way. These were broken into four main demographics: Gen Z, Millennial, Gen X, and Boomer.



**Gen Z**

Playing for the Experience



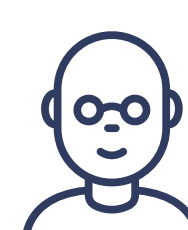
**Millennial**

Technology-Driven Player



**Gen X**

Incentive-Focused Player



**Boomer**

In-Person Gaming Seeker

# Player Insights By Generation

## Looking at Gen Z

### Prioritize the Social Experience Over Winning

Some members of Gen Z are just now turning 21 years old and becoming a prominent demographic in the casino space. For Gen Z players, casino gaming is an extension of their desire to have a social experience as opposed to just “winning.” They’re choosing to play in ways that create or nurture connections and expect their casino of choice to adapt accordingly, rewarding them and tailoring their offering in favor of moments of engagement. Now with the rise of online sports betting, the more traditional operators must now adapt to this new generation of players, bringing their in-person and online experiences closer in line for a more holistic approach.



(Younger generations) are more about the overall entertainment experience and the social aspect. They’re getting together to watch a game with a gaming activity. We weren’t doing extremely well with this group pre-pandemic. This has been a good opportunity to learn what this group of players desire and what limits are attractive to them. As they’re getting more accustomed to coming in, they’re trying slots because they haven’t tried them before.

– Todd George, Executive Vice President of Operations at Penn National Entertainment

## Gen Z Key Stats:

**35%** said their favorite loyalty program casino staff knows them well enough to know things about them personally.

**31%** use casino loyalty program rewards on friends and family (far more than any other generation).

**36%** say what entices them to place a sports bet in-person is the experience of watching with friends and family.

**77%** of Gen Z are more likely to consider a casino they feel wants them to live a sustainable lifestyle.

Preferred method of communication from loyalty programs:

#1 – Email (28%)	#2 – Text (24%)	#3 – In-app (23%)
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# Player Insights By Generation

## Looking at Millennials

### The Technology-Driven Players

For Millennials, the casino experience has developed into something very different. The key factor in that change has been the rise of online technology. This generation has shifted how traditional casino gaming has been perceived in the past. Millennials are a diverse generation that holds some remnants of traditional player values but are now driven to explore new experiences. As a result, Millennials have taken to sports betting with more fervor than any other generation and seem to be even more digitally inclined than their younger counterparts. Casino operators now have the challenge of finding the right balance for reaching and nurturing these players, as they can't rely on tried-and-true methods that have worked in the past.



I'm looking for every possible edge. I'll sit there and drive my brain crazy playing video poker. It's mind-numbing to stare at a screen and try to play as many hands as possible. There is no social element. At a poker table, you at least get to know people.

– Kyle G., Millennial Player, Colorado

## Millennial Key Stats:

Sports betting is most popular among Millennials

**69%** use a casino loyalty app or website at least weekly (more than any other generation).

**55%** have placed a sports bet in a gaming app in the last 2 years (more than any other generation).

**24%** said they will get a complete understanding of the tiers when researching a loyalty program before signing up.

**75%** of Millennials are more likely to consider a casino they feel wants them to live a sustainable lifestyle.

# Player Insights By Generation

## Looking at Gen X

### Incentive-Focused Player

Older adults make up a large percentage of patrons at land-based casinos, which is why Gen X is a demographic not to be overlooked. Casinos continue to be a source of entertainment for Gen X and operators should continue to welcome these older adults as valued customers. But while the industry evolves, one thing remains unchanged among this group: they want an easy and frictionless experience. More than any other generation, Gen X identified their desire to play more frequently both in traditional and digital settings. Casino operators must now understand that to win with Gen X players, they need meaningful incentives to get them to return.



**The reason I started gambling was to escape. I have a very demanding job and was raising my son. You can go to a casino and disappear. I keep to myself. I don't ask for anything or do anything unless I have to. I don't engage as much.**

– Maddy H., Gen X Player, Arizona

## Gen X Key Stats:

**66%** use loyalty rewards for additional play  
(more than any other generation).

**27%** wish to be communicated with through text  
(more than any other generation).

**61%** prefer placing sports bets online/through a mobile app  
(more than any other generation).

# Player Insights By Generation

## Looking at Boomers

### In-Person Gaming Seeker

When it comes to casinos, Boomers remain a consistent demographic for several reasons, including a disposable income and ample free time. More so than any other generation, Boomers are still looking for the in-person gaming experience.

Despite the steady flow of Boomers that take part in gaming, casino operators must still lean into their current in-person behavior. For those who also take part in the digital experience, casinos must also make them as seamless with the in-person experience as possible.



For us, it's not about getting a lot of free stuff. I can buy my own dinner. It's nice when I have a dedicated host to text to get reservations when planning to come up. I don't want to have to chase around a hostess who doesn't know who I am when someone who has some clout at the casino can do it for us. If you go out of your way to remove some obstacles, that's gold.

– James G., Boomer Player, California

## Boomer Key Stats

40%

say their favorite casino loyalty program is their local one.

71%

prefer to sign up for loyalty programs in person.

27%

use rewards for meals (more than any other generation).

82%

prefer slots.

37%

seek the ease and simplicity when using their rewards.



# 4 Key Insights & Marketing Opportunities

1

## The In-Person & Online Experience Are No Different in the Player's Mind

Take the best of both worlds and translate that into an all-around world-class experience.

2

## True Differentiation Often Begins with a Look Inside

No investment is too great. Take an honest and transparent approach to your business and performance.

3

## Achieve Customer Experience Mastery By Combining Technology With a Personal Touch

Keep things simple and provide your player with the seamless digital experience they have come to expect from the top brands they love.

4

## Prioritizing Your Employee Experience Will Improve Your Guest Experience

A great experience starts with the employees.



## 4 Key Insights & Marketing Opportunities

### Insight #1: The In-Person & Online Experience Are No Different in the Player's Mind

Whether they're signing up for loyalty programs or engaging with their preferred casinos, players prefer a holistic brand experience. Players expect to be understood by their casino of choice, not just for their gaming tendencies, but for their human behavior. Nearly a quarter of respondents say their casino staff members are not familiar with them in the slightest. By better connecting with players, online and in-person, casinos can start to see the complete player journey through a singular lens. Looking at the casino experience through the eyes of the players will help shed light on ways to enhance the player experience in order to increase engagement and player retention.



We're wrapping the entire experience into Caesars Rewards.  
We see a lot of cross-play out of digital into brick-and-mortar.  
Customers are realizing what their activity is allowing  
them to do, and it makes them a lot stickier.

– Tom Reeg, CEO at Caesars Entertainment



From an online versus  
in-person experience,  
50% of players  
said they *feel more  
comfortable betting  
online* than in-person,  
while 64% said  
they also *feel more  
entertained in-person.*

## 4 Key Insights & Marketing Opportunities

### Opportunity #1: It's Not Two Separate Experiences; It's One Experience, One Brand

It's always important to take a player's investment in your casino as seriously as your investment in them.

Think about your players' motivations and barriers. What you'll get in return is identifying the opportunities to create a well-balanced experience for both your operation and the player:

- Ensure that the loyalty rewards sign-up experience is just as seamless in-person as it is online and leverage a shared wallet to uncover increased cross-sell opportunities.
- Enhance the trip planning experience via mobile app as well as in-person.
- Ensure guests can access and leverage their rewards the way they want to.
- Make contactless and mobile payment options available for younger generations who are more likely to be cashless.



**When I first started, it was first stated there, 'You go to see the people, surroundings. It's more lively'. Now that I've gone back I say, 'I should have just stayed home'. So I play online. I have a better chance of winning.**

*– Anthony U., Gen X, New Mexico*



**We will spend significant energy to improve the guest experience and merge our digital and physical journey to give guests a more amazing experience.**

*– Steve Zanella, MGM Resorts International,  
Chief Commercial Officer*



## 4 Key Insights & Marketing Opportunities

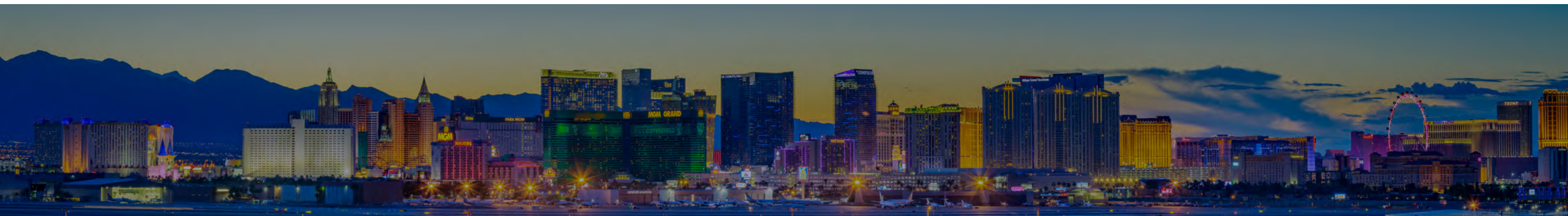
### Insight #2: True Differentiation Often Begins With a Look Inside

The casino industry is quickly becoming aware of their need to innovate, which can result in significant changes through an internal and external scope. While casino operators must view things from a business perspective, they must also look at the player's perspective. What players are telling us is traditional communication methods still work for them – 41% said that email is their preferred method of communication, which is 17% more than text message and 36% more than communication with their host. But that doesn't mean marketers should stop at just checking the email box. This opens the door for new ways to innovate.



**There's a culture of innovation and improvement, but part of improvement is addressing what we're not doing well. And even have third parties and experts in other areas provide their unbiased opinions.**

**– Kyle Anderson, Director of Casino Executive Communications,  
Yaamava' Resort & Casino at San Manuel**





## 4 Key Insights & Marketing Opportunities

### Opportunity #2: Stop Focusing So Much on Your Competition

#### Take Advantage of Opportunities Within Your Control

Consider investing in third-party, unbiased audits of channel strategies, tactics, and performance; even the highest-performing channels always have opportunities for refinement. Through these insights, casino operators are capable of creating a significant impact on existing players by fine-tuning the experience from their perspective. This impact starts as early as the consideration phase for potential players, and holds value through the retention phase. While a casino operation can't control a player's victories or losses, they can control their differentiation and exclusive offerings of their brand.



**We're really focused on offering more than just a commoditized gaming experience as we work with partners to provide world-class entertainment, new food and beverage offerings, along with unique and highly differentiated attractions.**

*– Brad Goldberg, Chief Marketing Officer at Golden Entertainment*

## 4 Key Insights & Marketing Opportunities

### Insight #3: Achieve Customer Experience Mastery By Combining Technology With a Personal Touch

Technology is rapidly becoming more intertwined with the gaming industry, but what does this mean for the customer experience? Although technological advancements are commonly associated with positive innovation, it turns out some players view new casino technology as a deterrent in their gaming experience. Simply put, technology can not stand alone in developing an elevated guest experience. In order to promote player relationships and retention, casino operators must protect personalized, holistic gaming experiences, even when the waves of technology are demanding change.



**I use the rewards app, which is great, because your room key's on your phone and that's helpful when you're staying there. I don't use it for a whole lot; I only use it when I'm there, tracking reservations and for all of our room information.**

*– James G, Boomer Player, California*



**Sportsbooks will be the younger generation's traditional casino games in the future. Traditional casino games don't have the potential for the social connection and stickiness that traditional games do.**

*– Christopher B., Millennial Player, Colorado*

## 4 Key Insights & Marketing Opportunities

### Opportunity #3: Drive Loyalty By Focusing on Innovation to Enhance Guest Experience

By paying close attention to players' habits, casino operations can gain fantastic insight on ways of improving the customer experience. While technology has proven to be a definitive way of advancing the guest experience, casino operators must think beyond technology when adjusting their operations. If casino operators want to innovate, they need to figure out what their customers' pain points are and use the tools they have to eliminate them. That could be by utilizing technology, design, communication, or customer service tactics.



**I remember an encounter that I had at the casino that was very memorable and enjoyable. I was at the courtesy counter and three employees came to congratulate me on my big win.**

*– Anonymous, Gen Z Player, Florida*



**We've launched a new option for guests to pay over time at The STRAT. It gives the guest another option to pay for their overall package which, in turn, provides greater capacity to experience more of what The STRAT has to offer.**

*– Brad Goldberg, Chief Marketing Officer at Golden Entertainment*

## 4 Key Insights & Marketing Opportunities

### Insight #4: Prioritizing Your Employee Experience Will Improve Your Guest Experience

Casino employees are the heart of your operation. Guests and players will interact with employees in more ways than one, whether it's being served a drink or dealing cards at the blackjack table. In order to improve the customer experience at its source, a successful casino operator will prioritize employee engagement and satisfaction in their overall strategy. By improving employee satisfaction, the gaming experience can instantly be elevated. Through more positive attitudes, higher-quality relationships, and shared dedication to casino goals, employees have the ability to completely redefine your service strategy.

Remember: your external and internal messaging should be mutually reinforcing, meaning the development of your brand should be an inclusive process. If you transform your internal culture, it will resonate with your external audience – AKA your casino players.



People are short-staffed and that has changed the experience. At all the casinos the wait times are longer when you hit a jackpot. And their demeanor is different. They're all exhausted and overworked and stretched so thin. It's more evident in Vegas. Sometimes you're waiting 15 to 20 minutes for a payout and that's unheard of. That has made an impact.

– Maddy H., Boomer Player, Arizona



Innovation and automation are here to stay, but we look at it through the lens of how to help team members perform their duties and elevate the guest experience. It's important that everyone knows why we're implementing such measures and how it benefits everyone involved.

– Kyle Anderson - Director of Casino Executive Communications  
Yaamava' Resort & Casino at San Manuel



## 4 Key Insights & Marketing Opportunities

### Opportunity #4: Know What Your Employees Value

To build a workplace that engages, motivates, and retains employees, casino operators need to fully understand their employees' needs and pain points. For one, access to the right tools, insights, and expertise can help further engage the casino workforce. The pathway to retaining employees is investing in their success and satisfaction. Benefits such as seamless scheduling and training opportunities for career growth are key to keeping your employees content. Not to mention, if your employees are happy, your guests will be too.



**They just loved me there. The workers were always happy to see me there. I felt very wanted there, which made me even happier to go.**

*– Anonymous, Gen Z Player, Georgia*



**They really made me feel like I was a valued customer. It felt like they were taking care of me, more so than anyone walking in. Being recognized as a familiar customer even at Hard Rock because of the vet's card. It was definitely a different treatment. Made me feel special.**

*– Brad J., Gen X Player, North Carolina  
Regarding loyalty recognition as a veteran over Memorial Day Weekend*

# Do you believe casinos take customer experience seriously?

The majority of all generations said Yes.



Gen Z

**77%**



Millennial

**84%**



Gen X

**81%**



Boomer

**84%**

# 3 Personas for Marketing

## The Key Player Personas Everyone Should Know

The insights drawn from these player types require a targeted messaging approach that speaks to the individual's motivations and pain points.

Keep in mind that player personas are singular representations of larger groups. The main intention for these personas is to understand player types through their behaviors, rather than relying solely on demographics. With these insights, casino operators can uncover and prioritize their untapped opportunities.

### The Experience Seeker



### The Traditionalist



### The Opportunist





## 3 Personas for Marketing

### The Experience Seeker

The Experience Seeker is all about the social experience. They are looking to have fun, whether that means playing slots with friends or forgoing the gaming floor to check out entertainment, dining, and/or nightlife. They tend to gamble for enjoyment, rather than spending hours to win big.

- Dedicated to the gaming aspect but wants the full experience
- Prioritizes customer service as a defining factor of their experience
- Takes full advantage of all the casino loyalty rewards being offered

#### When Playing at a Destination Casino:

**58%**

of all players are planning destination casino travel only one to two weeks in advance.

**46%**

of all players seek out mostly entertainment, dining & nightlife and a variety of slots to choose from.

**72%**

of all players tend to increase their gambling budget.

**77%**

of all players tend to spend more time playing.





# 3 Personas for Marketing

## The Traditionalist

Commonly known as a “whale” for their tendency to bet more, the Traditionalist is the affluent player who enjoys a level of intimacy throughout their casino experience. With this in mind, Traditionalists prefer to spend the majority of their playtime in person at their local casino where they can connect with casino hosts. They expect these casino hosts to provide them with a level of familiarity and hospitality that makes them feel welcome.

- Slots player, through and through
- Prefers email communication with his/her casino of choice
- Wants to be known by name when playing
- There to play and wants rewards that give them more opportunities to play

### Of Those Involved in Sports Betting:

43% still prefer to place a bet in-person, at a casino

47% are Millennials

28% female

### Of those Affluent Players, their top 3 casino games are:

67% slots

59% table games

49% sports betting

### When Visiting a Casino In-Person:

74% of players prefer playing slots

70% are choosing to stay and play at a local casino



# 3 Personas for Marketing

## The Opportunist

You could say that the Opportunist is a combination of the Traditionalist and Experience Seeker. This player wants it all, in an online and in-person sense. They want something unique out of their digital experiences – through mobile and web access, their choice of casino/betting platform, and receiving VIP treatment during in-person gaming.

- Gets the most out of the local casino, but also wants rewards to benefit travel
- Enjoys sports betting as an entertaining, social experience
- Spends a good amount of time sitting at a table
- Is loyal but will take free play opportunities at any casino and makes the most of that experience

**32%**

of all players say their local casino has their favorite loyalty program.

**27%**

of all players ranked comps as one of their top 3 ways to use rewards.

**31%**

of all players are enticed to place a sports bet in person at a casino to experience watching sports with friends/family.

**44%**

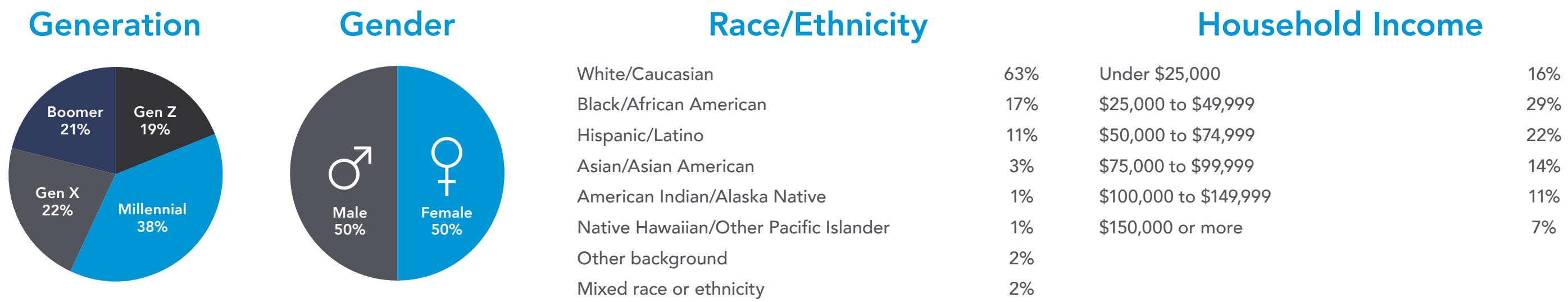
of all players prefer to regularly play table games.



# Goals & Methods of Research

## Survey Methods & Demographic Breakdown

In 2022, we conducted a national survey to better understand the casino player of today, looking specifically at the differences that exist across generations. We surveyed 1,384 current players and conducted interviews to serve as qualitative data on their thoughts on casino gaming and their overall experience. In addition, we spoke with several casino operators to grasp their business priorities and how they differ from what the average player seeks. The goal was to inform casino operators and lotteries of ways to better communicate with players and deliver unique experiences that inspire loyalty.





# The Team Behind the Report

## Who is LaneTerralever?

**LaneTerralever** is a marketing and customer experience agency focused on creating meaningful customer experiences based on deep strategic insights. We've helped tackle challenges like re-branding an entire gaming enterprise, launching new properties, developing seamless digital experiences, and increasing the adoption of loyalty programs for everyone from Indian gaming operators to nationally recognized gaming and entertainment brands across the country. We're proud to have increased visits for partners including Palms Casino Resort, Yaamava' Resort & Casino at San Manuel, Desert Diamond Casinos, The STRAT, MGM Grand, Arizona Lottery, and Blue Man Group.



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# The Team Behind the Report

## Who is Jefferies?

**Jefferies**, the global investment banking firm, has served companies and investors for 60 years. Headquartered in New York, with offices in over 30 cities around the world, the firm provides clients with capital markets and financial advisory services, institutional brokerage and securities research, as well as asset and wealth management. The firm provides research and execution services in equity, fixed income, and foreign exchange markets, as well as a full range of investment banking services including underwriting, mergers and acquisitions, restructuring and recapitalization, and other advisory services, with all businesses operating in the Americas, Europe, and Asia.



**David Katz**

Managing Director at Jefferies



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*The opinions expressed throughout the report are solely those of LaneTerraever and are not those of Jefferies Group, who we partner with on the consumer research study and executive interviews.*



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