

# THE INNOVATION GROUP OF COMPANIES

Consulting | Investment Banking | Development | Marketing | Operations | Management

# NEWSLETTER

## G2E ISSUE, OCTOBER 2012

The Innovation Group Expands Int'l Focus

IM: Harnessing the Voice of the Customer

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Considering iGaming? Think Social Media 1st

Industry Emerging Leaders Launched at G2E

## THE INNOVATION GROUP BROADENS INTERNATIONAL FOCUS

### ***Our Global Portfolio Expands with High Profile Involvements in Russia, Spain, Vietnam, Philippines, Mexico, Brazil and More***

The Innovation Group has expanded its global reach throughout the past year with a significant volume of international research, analysis, management, marketing, development and operational project efforts.

To date, The Innovation Group has provided its services on six continents and in nearly 80 countries, with key involvements from 2012 featuring some of the most significant gaming and resort development projects being considered and constructed throughout the world.

One of the highest profile assessments completed by our team was the feasibility work for a new multi-billion dollar integrated resort in Spain for Las Vegas Sands. We assessed gaming market demand and made recommendations regarding casino sizing and segmentation analysis for Barcelona and Madrid, the two locations considered for the operator's \$20 billion Euro-Vegas development.

Within the past few weeks, LVS announced that it had selection Madrid as the preferred location.

Another market we have been actively engaged in as of late is Russia. Working for government agencies, gaming and entertainment operators, financial institutions and private developers, we have provided our analysis

and development recommendations for all four gaming zones in Russia, included recent projects specific to Anapa, Vladivostok, Azov City and Kaliningrad.

Our strong presence has also continued throughout Asia, with key market assignments for expansion projects and ground-up Integrated Resorts in India, Sri Lanka, Japan, Philippines and Vietnam, with the largest volume in the latter two countries.

Specific to the Philippines, we recently completed a country-wide study and multiple gaming assessments for varying sites and developers within Entertainment City at Manila Bay. The clients for these efforts had us provide turn-key regional inputs including demographic data, gaming market drivers, player profiles, comparisons to the gaming markets in Macau, Singapore, Korea and Malaysia, regulatory overview and gaming revenue share estimates by market and segment.

Similarly, we have particularly active in assessing the Vietnam gaming market this past year, including project efforts in Hanoi and Ho Chi Minh City.

Completing our global sweep, other notable projects for 2012 include analysis and recommendations in Cyprus, Greece, Estonia, Mexico, Brazil and Canada.

For more information on The Innovation Group's international project capabilities, contact President Michael Soll via [msoll@theinnovationgroup.com](mailto:msoll@theinnovationgroup.com).



# HARNESSING THE VOICE OF THE CUSTOMER

## ***Innovation Marketing & GCommerce Advance Partnership to Help Clients Obtain & Respond to Patron Feedback***

As we speak with senior casino and marketing executives, we are frequently asked about growing market share and revenues; especially casino revenues. We usually answer the same way: begin with customer retention strategies, and then add customer acquisition strategies. Why? Our experience is that if you analyze your revenues (casino revenues or all revenues) with a focus on your customer base you will find the following:

- You have added new customers in the past year that were not there a year ago (or two years ago). Now that the market is beginning to grow again, albeit slowly, this growth should pick up.
- You have also lost some customers in the past year. Some no longer gamble. However, some gamble but not with you (as much or at all).
- Your net growth in revenue is equal to the growth in revenues coming from existing customers plus the revenue generated from new customers, LESS the revenue that used to come from guests who no longer patronize your casino for whatever reason.

While this may seem obvious, understanding this simple truth makes it easier to prepare a growth strategy, even in a slow economy.

When we work with clients, we usually start with a customer driven SWOT analysis. We have all performed analysis of the strengths, weaknesses, opportunities and threats of our operations (and our competition). The problem is they are usually completed by someone in the marketing department or in operations based upon what they think. So, of course the competitions' food is poor while ours is good, if not great. Of course the competition is not as friendly as our staff. And, of course we could improve but all in all, we have a superior product / service mix. If this internally driven analysis sounds familiar, you are not alone.

The real question is "what does the customer think?" This has never been more important. Why? Because your current and future customers have options and they are researching and analyzing them like never before. Furthermore, you have never had less control over their research and decision-making process.

Here is a quick snapshot of why this is true.

### **EXISTING CUSTOMERS**

Your existing customers rarely visit only one casino brand over their total visits during a year. They have an "acceptable set" of casinos that they visit. You may know them as a 10 times per year visitor to your casino, but what about the visits to other casinos? Are you capturing 100% of their annual casino experiences? Our work with our clients suggests the answer is probably no, depending upon how many competitors you have in the immediate market area. One of the quickest ways to grow your revenue is to increase your share of annual visits from your existing customer base. However, your customers are getting constant offers, messages, brand promises and actual experiences from both you and your competition. Your smart competitors are also thinking about how to increase their share of your customers. You need to know how you are faring.

### **NEW CUSTOMERS**

The internet has created a whole new world in how consumers research and then decide on how they choose a new anything, including casino, hotel, or resort experience. According to Expedia, 87% of consumers read travel reviews before making a travel decision and two thirds of them say the online opinions of others (strangers) are the most important research, according to TripAdvisor. In contrast, less than 20% of today's consumers believe or value the opinions of corporate messaging and advertising. So is all that money you are spending on billboards, newspaper and broadcast advertising a waste? Not necessarily. But today's consumers want information before they make a decision and they now conduct relatively extensive research before choosing a new casino, hotel, resort or other travel experience. Where do they find it? One of the emerging trends is called SoLoMo or Social, Local, Mobile. Consumers are finding review information on social media sites like Facebook, Google + and Twitter. They are looking for locational and proximity information with the aid of Google Maps, Bing Maps and other map services. All of this comes together through their mobile devices (phone or tablet). Mobile search is exploding while search on tablet devices are expected to overtake searches conducted on either mobile phones or laptop computers in the very near future.

What does all this have to do with growing casino and related reve-

lues? Everything! In the hundreds of research projects Innovation Marketing has conducted over the past several years, we consistently find that casino and resort executives do not truly understand what their existing customers really want, how they evaluate their alternatives and how they rate your products and services. We find that most casino and resort executives are surprised when we show them what potential customers see on the social networks when they are researching casino destinations for a trip they have decided to take. Here is our prescription for taking the first important steps to growing revenue; listen to the voice of your current and potential customers.

### **LISTENING WITHIN**

We recommend starting with your most important customers, your player's club members. The recommended components of this program include both quantitative and qualitative approaches. We also recommend you stratify your player data base. Here is one step by step approach we have successfully repeated with clients:

- Establish an advisory panel with 120 – 150 of your best customers. Recruiting is easy; you tell them you want their opinions, you will listen to them and you will feed them while you are talking to them. Customers love to believe they have the ear of senior management. They want to tell you what they think, and they are empowered if they think you are listening to them. We usually invite 12 – 15 panelists to the casino each month for a 90 minute focus group on what they love about their experiences at the property, what they want to see improved, where else they gamble, strengths and weaknesses of the competition and what they would do differently if they ran the place. We publish the results first to top management, then to all members of the customer advisory panel. Within months, we find that we have terrific insights into where we can improve and how we stack up against our top competitors. Within a year, we have 120+ advocates who believe they had a big hand in the improvements that were made at their casino.
- Conduct focus groups with past guests who no longer come to your casino regularly, or at all. We recommend 3-4 groups of 12 – 15 past player's club members twice each year. Individuals who are still gambling but not at your resort, at all or not as frequently. What will you learn? You will learn why they left you. You will learn who attracted them, how and why. All good insights considering that your best managed competitors are looking for

the same thing you are – new customers or more visits from existing customers.

- Distribute quantitative comment cards through electronic surveys to as many resort guests as possible and compile the results regularly. Better yet, consider doing a QR code for an electronic survey to be filled out on a guest's mobile phone. Who gets these surveys? Hotel guests. Restaurant guests. Spa and golf guests. Guests in your entertainment venue(s). Wherever you have customers using and commenting on their experiences at your resort, you should know what they think.

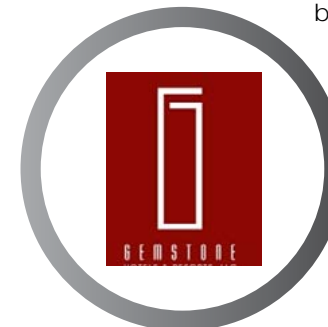
Many of our clients distribute comment cards, especially to hotel guests, but they collect the cards at the front desk or some other depository within the resort. Then they send the card to the appropriate department head to respond based upon the guest's comments. This is not effective. Best practices would require that the primary delivery vehicle for the surveys be electronic so results are immediately compiled into a database (there are several inexpensive and capable third party vendors we recommend if your in-house software is not capable of performing this analysis). A good software program can auto generate an immediate suggested response to any comments that are either negative or positive for review by management. T

he more important result though is a quantitative report and statistically trending of how you are performing in each of your amenities, and how the amenities relate to each other and the casino. For example, which hotel guests also gamble and eat in your restaurants? How do they rate those experiences? What do entertainment guests do before and after the shows they attend? How do they rate those experiences? We know from our research that there are a limited number of things you can do to earn loyalty on the casino floor alone. We all choose from the same offering of machines. We all offer the same table games and rules. The quality of the amenities can be a game changer.

The guest surveys tell you how you are doing compared to last week / month / year, how you are trending, where you should focus management attention and where your strengths and weaknesses lie.

### **LISTENING OUTSIDE YOUR FOUR WALLS**

Earlier in this paper we referenced the research that your prospects conduct once they make the decision to make a trip to a casino resort. This research is not conducted on just one site. According to Google, the average research is conducted over as many as 21 sites in up to three different sessions. If you are not visible when they start the search, you are not considered.



# HARNESSING THE VOICE OF THE CUSTOMER, CONTINUED

(Continued from Page 4)

More importantly, if you are considered, consumers are accustomed to reviewing what others are saying about you and your competitors across multiple channels and sites. What should you do? We recommend starting with an assessment of your reputation. That is what your prospect is doing. It answers these questions:

- What is important to customers, at least as far as what they are talking about on the social sites, blogs and forums?
- How much of the conversation is about you versus your competitors? It does not help if you offer a great food experience but no one is talking about it. So we want to measure the volume of conversation about your operation versus your competitors.
- How do consumers rate you on the areas that are important to them? How do they rate your competition?
- We have often discovered that what casino executives think is their strength and is well known is not what the customers are talking about. We have also been able to successfully change the conversation about a client by managing social media. However, make no mistake; we have not been able to stop consumers from talking about a bad product. The only solution for that is to fix the product.

In one high end Vegas client, for example, we were asked to conduct a reputation assessment. Management told us they thought their strengths were the entertainment experience and the best buffet in town. We scraped and analyzed over 400 social media sites, blogs, forums and review sites. Our results surprised both us and our client. The buffet was not as popular as management thought; it had a reputation for being overpriced. The casino entertainment experience was not rated high at all. What we did uncover was that women customers loved the full length mirrors in the guest rooms, the security and a couple of other services and amenities. The client changed their messaging to a female focused message and enjoyed positive results from this change.

If you are trying to expand your market area to new geographical markets or new market segments, we also recommend some focus groups comprised of the target gambler segments. We have done this for clients who are adding a new amenity such as a hotel, for example. Or for clients who want to penetrate

a new feeder market but don't know what messaging will work most effectively. In these situations, we want to do a deeper dive into the motivations and current habits of the customers we are trying to capture.

By combining the results of these different voices of the customer, we truly believe you will have a roadmap to increased revenues and increased market share. The results may require you to fix things operationally. They may require you to change or modify your messaging. They may require that you update your product and service offerings. However, listening to your customers and performing the type of online research that your potential new customers are performing every day will definitely pay big dividends if you react to what you hear.

The Innovation Group is the leading consulting and research firm in the gaming industry today. We have conducted hundreds of critical research initiatives for a host of clients within the gaming industry. Importantly, The Innovation Group has teamed up with a leading hospitality interactive marketing agency, GCommerce Solutions to offer expanded online marketing services to our clients. Over the past 10 years, GCommerce has become recognized as a premier provider of results-driven marketing services for hotels, casinos and resorts across the country.

This combined forces approach allows Innovation Marketing to be unlike most interactive marketing agencies. We start with grounded marketing principles and fuse smart technology to penetrate target segments through online marketing initiatives. This powerful approach relies on in-depth research, fluid communication between stakeholders, and flawless execution. The net result is increased revenue and profitability.

Each service we offer is designed to work in symphony with a cohesive global strategy to drive revenues. Our team maintains core competencies in Search Marketing, Social Marketing, Interactive Strategy, Online Media Services, Website Development, Electronic Merchandising & Distribution, Database Marketing and ePR.

For more information please contact Joe Witterschein via [joew@theinnovationgroup.com](mailto:joew@theinnovationgroup.com). Special thanks to Mark Van Hartesvelt of GCommerce for his contributions to this article.



# IS&E HIGHLIGHTS PGA TOUR™, TEXAS A&M CONTRIBUTIONS

Feature projects include events planning and market research for Seven Springs Mountain Resort, the PGA TOUR™ and Texas A&M University

Innovation Sports and Entertainment continued to grow its practice across a diverse base of clients.

## SEVEN SPRINGS MOUNTAIN RESORT



Starting off the summer, Innovation Sports and Entertainment went east from its Pittsburgh base to Seven Springs Mountain Resort for three great events. Seven Springs Mountain Resort, located in Seven Springs, PA, is a family-friendly resort that hosts more than one million overnight and day guests seeking an active vacation featuring the finest skiing, snowboarding, golf, zip lining, mountain biking, skeet shooting, hiking and many other outdoor activities that Pennsylvania has to offer. IS&E helped develop unique event options that were designed to drive attendance and room nights during soft weekends. The first event of the season was the Doo-Wop Festival held April 13-14, 2012. Capacity crowds and more than 100 rooms were sold for the two evening performances by The Marcells, Pure Gold and Jimmy Beamont and The Skyliners. IS&E also produced and facilitated the second annual Irish Fest and the third annual Rib and Wing Festival at Seven Springs. The Irish Festival was held July 6 - 8, 2012 and featured Irish vendors from all over the United States, including music, entertainment, an ethnic food tent and children's activities. The Rib and Wing Festival was held July 27 -29, 2012 and brought in championship ribbers from all over the United States to feed over 10,000 patrons who attended this annual event. Along with securing local and national sponsors for each event, IS&E will continue to work with Seven Springs on event marketing services for the top ranked destination resort.

## MYLAN CLASSIC: A PGA TOUR™ GOLF EVENT

Leading into Labor Day, John Swiatek and the Mylan Classic event team completed a very successful PGA Web.com Tournament. The Mylan Classic at Southpointe Golf Club in Canonsburg, PA is an annual Web.com Tour event and was held August 27 to September 2, 2012. Swiatek worked diligently with the Mylan Classic staff to secure spon-



sors, media partners and entertainment for this third year event. Craig Morgan, Phil Vassar, Diamond Rio, Due West and other bands entertained the crowds as part of the evening entertainment. During the week of events, Washington County had an estimated \$9 million in economic impact.



All four rounds were broadcasted by The Golf Channel both nationally and internationally. The Mylan classic raised over \$530,000 for local charities through the ANSYS Tickets Fore Charity program, bringing its three year total to just over \$1.3 million dollars. John Swiatek along with the Mylan Classic event team looks forward to helping the event continue to grow into the premier event Web.Com Tour. Jeff Kotula, President of the Washington County Chamber of Commerce said, "John Swiatek brought the event idea to our county and he and the Mylan Classic team have made it a huge success for our region".

## TEXAS A&M UNIVERSITY



As we turned into fall, the sounds of college football fill the air and IS&E is helping the newest member of the SEC, Texas A&M University, renovate their home stadium, Kyle Field. Innovation Sports and Entertainment is part of a team to evaluate and advise Texas A&M on the renovation and expansion of Kyle Field as it prepares itself for the move to the SEC. The team includes Populous Architects, CSL and Innovation Sports and Entertainment, with our role focusing on extensive quantitative research and user studies to solidify the program.

Our contributions are helping identify the appropriate fixed seating capacity, strategies for generating additional revenue and improving fan amenities, and other multi-use opportunities to create a cohesive brand experience that is unique to Kyle Field. The end result will amplify the nationally recognized "12th Man" home-field advantage from inside and out.

For more information about Innovation Sports & Entertainment, please contact John Swiatek via [jswiatek@theinnovationgroup.com](mailto:jswiatek@theinnovationgroup.com)

# INNOVATION CAPITAL SEES ROBUST GAMING M&A ACTIVITY

*Innovation's Investment Banking Affiliate Has Been Actively Involved in M&A Transactions*

Innovation Capital continues to see robust activity in the mid-market gaming mergers and acquisitions ("M&A") sector, with a number of transactions currently in the market, further solidifying the firm's leadership position in the industry. Innovation Capital's M&A practice has been active in sell-side representation of healthy and distressed single-property casinos, small-cap / mid-cap operators and iGaming companies.

A few notable and recent transactions include:

- Jumer's Casino & Hotel sale to Delaware North Companies
- Stadium Technology sale of a controlling interest to Ladbrokes
- Isle of Capri Casinos pending sale of its Rhythm City Casino in Davenport, Iowa

Recognizing Innovation Capital's unparalleled execution as exclusive financial advisor to Jumer's in the sale to Delaware North Companies Gaming & Entertainment, The M&A Advisor in 2012 named Innovation Capital a winner of its *Deal of the Year Award* in the Consumer Services Sector for middle market transactions. "Innovation Capital represents the best of the M&A industry and earned these honors by standing out in a group of very impressive finalists," said Roger Aguilardo, CEO and Founder of The M&A Advisor.

Innovation Capital expects the robust M&A activity for both land-based casino and iGaming segments to continue, with strained federal and state budgets and low capital costs combined with the regulatory changes taking place throughout the industry. Matt Sodl, President and Managing Director of Innovation Capital, comments: "We continue to see strong financing markets which help to facilitate activity in the sector. There continues to be strong interest in gaming from private equity firms, hedge funds and strategic buyers, with valuation multiples remaining relatively constant between 7-8x for regional properties and upwards of 9x in Las Vegas."

Innovation Capital is a leading boutique investment bank dedicated to representing mid-market clients in the gaming, leisure, restaurant and retail industries. Innovation Capital provides comprehensive advisory services in the areas of mergers and acquisitions, corporate finance, financial restructuring and valuations/fairness opinions to companies in the \$20 million to \$500 million value range.

For further information about Innovation Capital, please contact Matt Sodl at [msodl@innovation-capital.com](mailto:msodl@innovation-capital.com) or Kevin Scheible at [kscheible@innovation-capital.com](mailto:kscheible@innovation-capital.com).

**M&A Advisor Deal of the Year**

**JUMER'S CASINO & HOTEL**  
Rock Island, Illinois

**\$180,000,000**

has been acquired by

**DNC**  
Delaware North Companies

**Exclusive Sell-Side Advisor**



# GROUNDBREAKING FOR POTAWATOMI BINGO CASINO HOTEL

*Innovation Project Development Serving as Owner Representative for Major Hotel Addition; Other Innovation Affiliates Also Contributing*

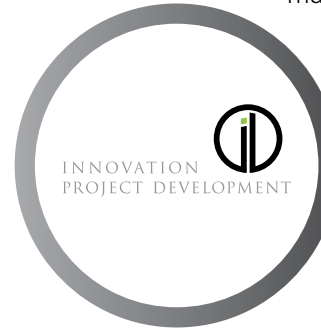
Bob Kelly represented The Innovation Group of Companies at the July 12, 2012 groundbreaking for a major expansion of the Potawatomi Bingo Casino (PBC) in Milwaukee, Wisconsin. The Innovation Group, Innovation Marketing, and Innovation Project Development have each been involved with the Forest County Potawatomi Tribe's casino operations in Milwaukee for several years, providing analysis and recommendations for the existing property, feasibility analysis and master planning for potential expansions, and now as the development consultant, helping this major expansion project become a reality.



*Shown: Bob Kelly (center) with the design team from Cuningham Group*

The project will include a 4-star 20-story hotel with approximately 385 rooms, a 15,000 square foot spa, a 15,000 square foot roof-level pool and entertainment facility, 20,000 square feet of new meeting facilities, and several new food and beverage options for casino and hotel guests. The existing parking structure will be extended and new gaming areas will be developed connecting the new and existing components. The overall development budget is in excess of \$150,000,000.

The Innovation Group is providing strategic advising services, background market analysis, and target demographics. Innovation Marketing is assisting in defining the nature and size of many of the amenities to help expand the existing player base to more up-market levels. Innovation Food and Beverage has performed a thorough analysis of the existing strengths and weaknesses of the food and beverage venues with an eye towards developing the new elements for maximum return on investment.



Gemstone Resorts is also part of The Innovation Group of Companies team, providing detailed management and operational advising on the hotel compo-

nents, and they will be assisting PBC during hiring, training and start-up phases with on-site support.

Innovation Project Development has been leading this team for the past 14 months while also providing programming, pricing and scheduling consulting to PBC for the project. IPD will be handling the procurement and installation of FF&E and OS&E packages as well.

The comprehensive and coordinated bundle of services being provided to PBC under IPD's leadership could only be provided by a consulting group with the breadth of

The Innovation Group's reach, and the single source provider has proven to be beneficial to Ownership both practically and financially.

For further information about Innovation Project Development, please contact Bob Kelly via [bkelly@innovationpd.com](mailto:bkelly@innovationpd.com).



*Rendering Courtesy of Cuningham Group*

# CLIENT Q&A: FANFOUND

## *The Innovation Group Partners up with Another Industry Leader Looking to Expand their Brand into Gaming, Entertainment and Hospitality*

The Innovation Group of Companies is frequently retained by established brands looking to expand their operations to the gaming, entertainment and hospitality industries. In 2011, the organization announced that its Innovation Food & Beverage practice was engaged to represent Ovations Food Services and Papa John's Pizza, and in 2012, we are pleased to announce that Chicago-based FanFound will be partnering with The Innovation Group of Companies to take advantage of our vertical reach and reputable network in the entertainment and leisure sectors.

Recently, The Innovation Group's COO, Kimberly Arnold, sat down with FanFound Founder and CEO Chris Bauman to discuss the company's unique business model and entertainment-centric growth strategy.

### **ARNOLD:**

What should the entertainment industry know about the business model for FanFound?

### **BAUMAN:**

I read a quote in 2010 in the Digital Music News from Live Nation's Jason Garner that stated 80% of entertainment events and 40% of all tickets go unsold each year. FanFound exists as a business to address the gap of distressed and unused inventory. We get "people through the door" and help turn empty seats into revenue.

FanFound has a unique ability to fill inventory in a short time-frame, which is a win-win offering for everyone involved: entertainment acts tour better, are more profitable and garnish wider exposure; consumers gain access to free or reduced priced tickets; and operators have enhanced visitation to their properties last minute – all without the stigma of ticket price slashing and price dilution - that they can then take these attendees and monetize them through other means.

### **ARNOLD:**

How specifically do you outreach to the consumer?

### **BAUMAN:**

FanFound has reach to a massive database of consumers looking specifically for entertainment opportunities in music, theater, comedy, symphony, culture, entertainment, gaming and more. We work directly with venues, promoters, and industry insiders to market promotional tickets to that subscriber

base. Membership at FanFound.com is by referral, and there is no fee associated with joining.

FanFound members have exclusive access to free promotional tickets and exclusive entertainment opportunities. Daily newsletters and social media outreach tools are among the direct calls to action that alert members to the sale launch. They gain access to short-term ticket deals distributed on a first come, first serve basis, again avoiding long term price dilution. Most of our promotions sell out of inventory within a few hours.

### **ARNOLD:**

What are the fee structure options that you consider?

### **BAUMAN:**

There are three proven revenue stream options for FanFound, and probably even more that we haven't considered yet. In many cases, the operator is willing to provide the tickets for free (this is particularly true for our casino clients as they recognize that incremental revenues from monetized gaming, liquor sales or food and beverage can have more value than the tickets themselves). In these cases, we get paid by the head, typically in the range of \$3 - \$20 per person, depending on the venue and event. Again using the casino example, these properties tend to be on the higher end of this spectrum, and some of our deals may be dependent upon the number of patrons we can drive to sign up for their players club.

Alternatively, if the tickets are provided to us for sale at a discount, we take a fixed percentage of the revenue once the ticket is sold. The third piece comes as a tangent to reduced ticket pricing as there is a minimal service fee to the members for processing the transaction.

### **ARNOLD:**

What is your personal background and how did you first get involved in the casino industry?

### **BAUMAN:**

My background is a blend of technology and music promotion. I began my career in the banking industry, specifically home finance. As I was going through my MBA program, I started a music promotion company in Chicago, push-

ing over 25,000 people to various events over a multi-year year period. As an outgrowth of my MBA studies, I had the idea for FanFound.com and started building out the required technological components. During that time, I had the opportunity to consult with various tech companies and managed the build up of their infrastructure for link back's and blog-based sites to create online traffic. Importantly, I also advised a company involved in live streaming of concerts. This is an area we are still pursuing because it is an incredible marketing opportunity for performance venues, especially those within casinos. It not only offers free advertising and attracts consumers on a local, regional, national and international level, but it gives a direct opportunity to regularly engage massive amounts of consumers based on their interests.

Our first client in gaming was the best one we could have hoped for – Caesars Entertainment. As an operator, they understand that lost ticket sales are actually an opportunity to reach out to new gamers and diners. Recently, for Caesars in Hammond, Indiana, we were able to liquidate 200 tickets for a national comedy tour in only 3 hours, and as a result, we generated traffic and revenue for Caesars that otherwise would not have come to the casino and its nightclub and F&B venues.

To my knowledge we are one of three such marketing engines for distressed inventory for Harrahs/Caesars along with Groupon and Living Social. We also recently solidified a relationship with Hoosier Park in Indianapolis, and plan to partner with them on various initiatives as we launch the Indianapolis market

### **ARNOLD:**

What makes FanFound different than entities with similar functions like Groupon or Living Social?

### **BAUMAN:**

First, our entertainment centric database ensures clients are actually interested in the products our operators are offering.

Second, because we are more boutique, we can be much more flexible and recurring with our deals and pricing structures.

And third, the larger engines have strict minimums on volumes and we don't. We will help an operator clear 10 tickets or 1,000, and since most clients rarely have the volume that Groupon and Living

Social demand, we are able to capture and sell all the low hanging fruit. Add to that our versatility and adeptness at engaging specialized entertainment market through social outreach, and the appeal and success rate becomes obvious.

### **ARNOLD:**

How can FanFound help operators in entertainment industries that don't have a fixed inventory or ticket sale allotment?

### **BAUMAN:**

That's a great question because that is the next slice of the industry we are capturing. FanFound is committed to expanding our partnerships and exploring various verticals. Golf courses, water parks, theme parks, ski areas and the festivals/events segment - none of these operators have fixed inventories of tickets to sell on a daily basis, but that doesn't mean they don't have the incentive to drive more traffic to their facilities. The options in entertainment are endless.

In my hometown of Chicago, for example, there are a number of rooftop venues surrounding Wrigley Field that allow patrons to pay a small fee to view the game from their properties, but the task for those properties is to find innovative ways to drive traffic. Every day can mean a new game, but the product and content is typically the same. They offer all inclusive beer and food sales, but it is difficult for them to continuously drive the volume and distinguish themselves from the next rooftop over. We help these operators give their clients a new reason to come.

At a water park, visitation may be promoted with a free day, half off the next or discounted F&B the next. The same goes for a theater complex looking to push 600 people to a movie at the last minute. We have access to a national patron database, so we work on an operator's behalf to help drive the access.

At the end of the day, it is all about how many doors you can open and get folks to walk through...and our operators benefit from this whether they have a fixed volume to sell or not. Plus, the operators always control the inventory available to our members, thereby controlling the market and ultimately how many people they would like through their door on a particular day. FanFound is truly the missing piece for both venue operators and consumers who are looking to try new experiences.

For more information, visit [www.fanfound.com](http://www.fanfound.com) or contact Kimberly Arnold at [karnold@theinnovationgroup.com](mailto:karnold@theinnovationgroup.com)



# THE INNOVATION GROUP OF COMPANIES AT G2E

*Our Team of Professionals will Help Lead the Following Sessions at the 2012 Global Gaming Expo*

## **IGAMING: USING EXISTING STANDARDS, CREATING NEW ONES (ADVANCED GAMING INSTITUTE)**

Room: Bellini 2104 ~ 2:30 pm - 3:30 pm (Monday, October 01, 2012)

iGaming is the industry's biggest buzzword, and there are recent historical cases to help emerging markets move into this next future of gaming. This session will take a 30,000 foot look at recently emerged jurisdictions to analyze what happened, how can standards help the process in other emerging jurisdictions, and how standards can help new operators, suppliers and regulators avoid pitfalls.

Key Takeaways: • Review translatable standards from other industries • Learn how standards will ensure safe and secure transactions • Hear plans for increased transparency

Speaker: **Mario Galea - President, Random Consulting / VP Innovation Interactive**

## **ASIAN ACTION: INVESTING ON THE PACIFIC RIM (FINANCE TRACK)**

Room: Veronese 2505 ~ 2:00 pm - 3:00 pm (Tuesday, October 02, 2012)

While the industry's latest boomtown is inarguably in Asia, investors are not always sure what will work there. At this session, experts will explain the investment options available in Asia and debate how long the current growth rate can be maintained. The risks associated with Asian investment as well as issues to consider when dedicating capital to the region also will be discussed.

Key Takeaways:

- Learn about the full scope of gaming investment opportunities
- How to buy low and sell high in Asia
- Are there still opportunities in Singapore and Macau?

Moderator: Ben Lee - Managing Partner, IGamiX Management & Consulting Ltd

Speakers: Dean Macomber - President, Macomber International, Inc. | Steve Park - Senior Consultant, GAPC & KTO

Advisory board | **Kevin Scheible - Director, Innovation Capital**

## **RESTAURANT REFOCUS: 5 STAR OR FRANCHISE? (CASINO DESIGN TRACK)**

Room: Veronese 2501 ~ 2:00 pm - 3:00 pm (Tuesday, October 02, 2012)

Some of the easiest things to change when renovating a casino are the food and beverage offerings. At this session, learn how to discern what your customers will respond to and how to deliver that in a cost-effective and efficient manner. Discuss how everything from gourmet restaurants to fast food chains may fit that need and learn how to incorporate their design into your current décor.

Key Takeaways: • How to evaluate other F&B offerings in your market

- Learn whether to operate in house or lease space
- Evaluate recent impacts on costs as well as on players' budgets

Moderator: **David Rittvo - Director, Food and Beverage Division, The Innovation Group**

Speakers: Chuck Bragitikos - President, Vibrant Development Group | Meredith Gelacak - Senior Vice President of Hospitality, Caesars Entertainment, Inc. | Tom Recine - Vice President of Food & Beverage and Retail, Tropicana Las Vegas



## **TOURISM TRADEOFF: COMBINING GAMING WITH ATTRACTIONS (HOSPITALITY TRACK)**

Room: Titian 2302 ~ 11:45 am - 12:45 pm (Tuesday, October 02, 2012)

In cities around the world, governments are considering adding gaming to the mix in order to attract more visitors. Experts will examine how that works and if gaming customers also enjoy other tourism attractions. Using special events as a tourism driver also will be discussed.

Key Takeaways:

- Discuss the role of gaming in today's tourism market
- Learn how to balance the size of investment with tax rates
- Review successful joint marketing programs between casinos and tourism agencies

Moderator: **Steve Rittvo - Chairman, The Innovation Group of Companies**

Speakers: Lyle Hall - Managing Director, HLT Advisory Inc. | Steve Karoul - President & CEO, Euro-Asia Consulting, LLC |

Chris Meyer - Vice President of Sales, Las Vegas Convention & Visitors Association

## **F&B MANAGEMENT: RESTAURANT TRENDS (HOSPITALITY TRACK)**

Room: Titian 2302 ~ 3:15 pm - 4:15 pm (Tuesday, October 02, 2012)

Food and beverage is one of the most powerful drivers of non-gaming visitation at casino resorts. During this session, experts will examine what works in what jurisdictions and how to keep abreast of restaurant trends. Themed F&B events, including wine tastings, food truck festivals and more also will be discussed.

Key Takeaways:

- Find out how to improve profits by creating efficiencies
- Learn whether third party or in-house operations are the best fit for your operation
- Explore the advantages of creating multi-use F&B outlets

Moderator: **David Rittvo - Director, Food and Beverage Division, The Innovation Group**

Speakers: Rino Armeni - President, Liquids Unleashed | Jeffrey Frederick, C.F.B.E. - Regional Vice President of Food and Beverage, Caesars Entertainment, Inc. | Corey Nyman - Director of Operations, The Nyman Group | Adam Sternberg - Director of Sales, Avero

Advisory board | **Kevin Scheible - Director, Innovation Capital**

## **PARTNERSHIPS FOR SUCCESS: MODELS THAT WORK (IGAMING TRACK)**

Room: Titian 2204 ~ 11:45 am - 12:45 pm (Wednesday, October 03, 2012)

International gaming suppliers and existing online operators are actively courting U.S. casino companies. While U.S. indictments against PokerStars, Full Tilt and others slowed that movement, today companies like bwin.party and even U.S. gaming suppliers are again forging formal relationships with U.S. casinos in anticipation of legalization. Learn more about how these partnerships will work during this session.

Key Takeaways:

- Hear about existing agreements between suppliers and casino companies
- Understand the regulatory hurdles
- Evaluate the slot manufacturers' plug-and-play options

Moderator: **Kimberly Arnold - Chief Operating Officer, The Innovation Group / Co-Manager, Innovation Interactive**

Speakers: James Keane - Managing Director, International Markets, Sportingbet PLC | Michael Lipton Q.C. - Senior Partner, Dickinson Wright LLP | John McManus - Executive Vice President & General Counsel, MGM Resorts International | Jordan Levin, COO, WMS Interactive

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# EXPANDING? THE VALUE OF THIRD PARTY F&B OPERATORS

## *Ovation Food Services, a Strategic Partner of Innovation Food & Beverage, Shares Thoughts on F&B Strategy During Design, Construction or Renovation*

According to Max Van Rees, Vice President of Facility Design for Ovations, “engaging third party experts in food service, event center and hotel management can save a casino operator hundreds of thousands of dollars in the front side of design and millions later on in labor, equipment replacement and energy costs.

Additionally, he explains that Ovations employs smart design which that allows for multiple uses of common areas such as single kitchens serving different concepts with shared storage and ware washing facilities as well as the use of longer lasting, more efficient cooking equipment that reduces cook time thus eliminating labor hours and reducing energy consumption. Other synergies can be gained such as as well that include reduced design costs given that as often third party hospitality operators often have internal design teams who are able to workcouple with architects and builders to plan space layouts and concept ideations that meet brand specifications. A final added benefit is the reduction of initial capital purchases as Ovations purchases millions of dollars in equipment each year and allow casino planners to “tap” into their purchasing power when buying furniture, fixtures and equipment – Ovations will even create specification data sheets to ensure that all equipment meet quality standards.

There are many other benefits of onboarding a third party hospitality specialist such as Ovations in the early stages of design, build and renovation. Competition had spiked among casinos competing among one another for new players as well as among other entertainment options in the casino’s market. As this competition has increase so has the need to differentiate the casino’s hospitality amenities to help set it the casino apart with the hopes of attracting and retaining more players.

Ovations, which happens to be a subsidiary of one of the world’s largest television and communications companies, Comcast NBC Universal, has a unique ability to access and broad range of impactful brands ranging from celebrity entertainers to one of a kind branding experiences. Recently, Ovations completed the development and implementation of one

example of this type of access for the Comanche Nation with the opening of Countryville Bar & Grille® at its Red River Casino.



This unique concept features a collaboration of Dick Clark Production’s American Music Awards and Ovations operations to create a one of a kind country music haven for casino guests to dine and be entertained. Ovations is working with other tribes to bring impactful concepts such as a unique NBC Sports Arena Bar and PBR bull riding bar and grills. Involving third parties on the front side also helps to ensure casino operators that the brands chosen for the casino are strategi-

cally picked to meet the overall marketing goals of the gaming operations. Ovations goes to great lengths to survey the local marketplace and mine the data of existing and potential users using an analysis of Claritas PRIZM data which evaluates the behavioral habits of the key targets of the casino so that brands chosen perfectly fit the desired players choice of dining or entertainment. If a regional or national brand does not work into the casino’s strategy, Ovations in house marketing department Innovations Studio™ will create an entirely custom brand for your casino or hotel.

For the Gila River’s Wild Horse Pass Casino and Hotel, Ovations’ creative team developed signature brands for every bar and food service outlet that did not have a national brand and they are in the process of doing the same for the Community’s newest Vee Quiva casino and hotel. The team is not just focused on food services as they have created event center branding uniquely named Ovations Live™ and even recently worked with the Shoshone-Bannock Indian Tribes to develop the brand image and hotel name for the Shoshone Bannock Hotel & Events Center through a collaboration and contest with tribal members helping to choose the hotel’s brand image.

Prior to a casino, event center or hotel’s opening another important aspect is the recruitment, hiring, and training of staff. Third party hospitality management companies such as Ovations have fully

developed operation procedures and training programs that are customized to fit each projects needs; saving money and shortening the learning curve time from hiring to actual service. This reduces a projects start-up budget and ensures that the operations are at 100% efficiency from day one of operations eliminating opportunity cost and the chances of subpar service.

At the Gila River Indian Community, Ovations was chosen to manage 100% of the food service operations at all three of the Community’s major casinos. Ovations has worked closely with the Community to develop a mentorship program that is the first of its kind in food services career development.

The Gila River program is focused on providing a structure and path for tribal members to learn and excel based upon the career path of their choosing. The program pairs tribal members with mentor coaches and is focused on building cohesive, high-performance, on-site employees.

To date tribal employment has soared and retention rates are higher because people enjoy the roles they play and have a clear vision of their role. More than 256 members have participated in the program with dozens already elevated to supervision management roles as a result of completing the program. Growth and career opportunity are core values of Ovations.



to the facility casino, event center, or hotel through a third party’s management practices and day to day goods purchasing power – often the fees charged for third party services are less than the savings. This produces providing peace of mind on the operations of the amenities that surround gaming and allowing casino managers to focus on the most important aspects of a casino’s revenue source – gaming itself.

The unique management fee and incentive structures used by companies such as Ovations ensures that Tribal governance and gaming managers do not lose control of the amenities and have a direct say in the day to day and long-term planning of these areas.

*Ovations is a leading provider of professional hospitality management services to hotels, event center, casinos and public assembly serving more than 120 clients throughout the United States and Canada including 14 Native American facilities.*

*They are recognized by gaming management firms, tribal communities, architects, and industry consultants for our ability to design*

*and deliver compelling branding, operations, marketing, and cost saving management solutions.*

For more information, contact David Rittvo at [drittvo@theinnovationgroup.com](mailto:drittvo@theinnovationgroup.com)



If you combine the savings in design costs, equipment purchases, labor reduction and power use with the ongoing savings brought

# REACHING OUT TO TOMORROW'S INDUSTRY LEADERS

**A New Organization Committed to Supporting the Emerging Leaders of Gaming, Entertainment & Hospitality Begins at G2E 2012**

## OVERVIEW

Emerging Leaders is a select professional group that consists of rising superstars in the gaming, entertainment, hospitality, food and beverage, tourism and other leisure industries. The primary mission of this organization is to provide up-and-coming professionals with direct access to other exceptional peers on the same fast-track to success.

Conceptualized by the The Innovation Group, Emerging Leaders will work to identify and further cultivate the next generation of senior executives by encouraging educational, networking and social opportunities on a national and international scale. Emerging Leaders is envisioned to be a sustainable network across the globe, keeping members connected with each other and well-informed about latest trends and best practices. Through various channels, young professionals will have the opportunity to share their interests, gain new strategies for success, enhance their leadership capacity, and develop their careers.

## MEMBERSHIP QUALIFICATIONS

Ideal candidates for this program are professionals under the age of 45 who have already demonstrated significant potential as a future visionary in gaming, entertainment, hospitality, tourism and leisure. While many Emerging Leaders already hold senior level positions, it is clear their full potential is not yet recognized.

## MEMBER-ONLY NETWORKING EVENTS

Emerging Leaders aims to host a number of networking events in association with major gaming and leisure conferences throughout the year in order to promote the professional development of its attending members.

## SOCIAL MEDIA OUTREACH

Emerging Leaders is set to launch a professional group on LinkedIn under the name "Emerging Leaders of Gaming, Entertainment and Hospitality". In addition specialized subgroups for Food and Beverage as well as Internet Gaming (iGaming) are planned. The LinkedIn platform provides a fast and easy way for Emerging Leaders to connect with their peers, engage in active discussions on relevant content, and post news and thought-provoking articles.

## NEWSLETTERS, EXCLUSIVE DATA & MORE

Emerging Leaders will distribute newsletters with intellectual exploration of relevant trends in the gaming and leisure industry. In addition, we will highlight members who are new to the group or those who have had a major transition in their professional career.

Additional initiatives are also underway, including access to educational webinars, mentoring programs and member-only industry and market research developed by The Innovation Group.

## FIRST EVENT PLANNED FOR G2E 2012

We are pleased to announce that Emerging Leaders is hosting its first networking event in association with G2E 2012. Notably, candidates to this invitation-only gathering were all nominated by existing C-level / senior-level managers from the industry's most successful operators, government entities, global financial institutions, and professional associations.

Industry pioneer John Acres will address the Emerging Leaders as the series' first guest speaker on October 3rd.

## NOMINATE AN EMERGING LEADER

If you would like to nominate a candidate from your organization for future participation in Emerging Leaders, please forward a brief bio for the individual to [leaders@theinnovationgroup.com](mailto:leaders@theinnovationgroup.com).

Please be sure to include the candidate's email address so that we can inform them of approved membership.

For additional information, please contact David Rittvo via [drittvo@theinnovationgroup.com](mailto:drittvo@theinnovationgroup.com).



# COLORADO GAMING ASSOCIATION TO LAUNCH LEARNING SERIES

**First Event to Feature Global Gaming Women Breakfast Followed by Half Day Educational Panels Open to All Participants; Innovation to Co- Produce**

The Colorado Gaming Association is set to launch a new Learning Series for its casino members and supporting partners in the region. The event will be hosted by Ameristar Casino in Black Hawk, Colorado, on Friday, October 26, 2012, and will be co-produced by the CGA, The Innovation Group, WorthGroup Architects and Haselden Construction.



The half day program will begin with a *Global Gaming Women Breakfast* from 8:00 - 9:30 am sponsored by the Learning Series producers and the American Gaming Association. High-profile female panelists from the industry will be featured, along with a presentation from Colorado Women's Chamber of Commerce President Donna Evans.

For those unfamiliar with the *Global Gaming Women* initiative developed by the American Gaming Association, GGW events are held in conjunction with industry conferences and in gaming markets that can benefit from opportunities for females leaders and rising stars in the industry to connect. All female participants in the Colorado gaming industry are encouraged to attend.

Immediately following at 9:45 am, the Learning Series will open up to ALL participants and feature two complimentary panel sessions focusing on design, construction and development issues. The first session will consider unique considerations of projects in historic districts; and the second will evaluate trends in amenity design in the gaming industry. Lunch will follow at noon and will

feature keynote speakers Ron Kammerzell, Director of the Colorado Division of Gaming and Al White, Director of the Colorado Tourism Office.



For more information and to register for the panel session and the luncheon open to all Colorado industry participants, email Lois Rice, Executive Director, Colorado Gaming Association at [cologaming@gmail.com](mailto:cologaming@gmail.com).



To register for the *Global Gaming Women Breakfast ONLY*, please visit <http://www.globalgamingwomen.org/events/upcoming-events>



# CONSIDERING IGAMING? DEVELOP SOCIAL STRATEGY FIRST

*Innovation Interactive's Consultant Mario Galea Offers Editorial Commentary on the Social Media Infrastructure Needed for an iGaming Launch*



In the highly dynamic and constantly changing technology industry, businesses must be always flexible and willing to adapt to new trends. Ten years ago, land based gaming operators everywhere petitioned to stop online gaming from entering their borders. They saw the new technology as a threat to their business and sensed that it was going to bring a stop to their growth.

Unfortunately, that was the only moment in time when land based operators could have come into online gaming with their own steam. Inevitably though, the industry has come full circle, and many land based operators are realizing that they need to adapt by incorporating the new technologies into their business. While the reintroduction of online gaming in North America now seems inevitable, the greater challenge may be in the realization that what was good ten years ago may not be good now. In a post-recession economy, consumer habits have changed with long-term effects.

Land based operators are in the business of offering excitement and an experience. It is possible to offer excitement online but the experience takes completely a new dimension. Gamers who play online are looking for excitement, but when it comes to their choice of entertainment, they are being influenced by other factors. In a study carried out by the Las Vegas Convention and Visitors Authority (LVCVA) in 2011, it revealed that a new target audience, the 'persuades' generation, had no real knowledge of the destination. 'Persuades' liked Vegas, were interested to travel, but when they searched online for additional information, ultimately finished opting for a different type of destination or entertainment.

So what was influencing the choice of these consumers? Social media and online offers. Casino operators in Las Vegas and beyond are recognizing this fact, and have responded by developing new ways to communicate their offers to consumers. Social media presence, mobile apps and social gaming are some of the initiatives used to bring the 'persuades' into the

Vegas properties. Consumer habits are already changing with these new technologies. For example there has been a sales shift of Vegas show tickets from online to mobile. Social media is helping close the loop between when the player is physically on the property and when he is away.

Many casino operators think that by offering online gaming in some way – free-play, social or otherwise - it is going to help their business. And while that is likely true for most operators, online gaming should only be seen as part of a broader strategy that builds the player experience lifecycle. The game offering must be tied to the experience, not the excitement element. In this, casino operators have the advantage of owning a destination, that with the right level of online engagement, a player is willing to visit or revisit. Additionally that same player can potentially become an influencer to those who are looking for their entertainment options.

In working with The Innovation Group and its Innovation Interactive practice, we are advising a number of clients throughout the U.S. regarding their online strategy. And there is one consistent message that we continue to share: Casino operators are jumping the gun when implementing online gaming without having a social media strategy in place.

Various studies have demonstrated recently that 90 - 95% of consumers now research their vacation and entertainment destinations online before making a booking decision. And if the numbers are this high for land based experiences, you can only imagine the importance of social outreach when the product itself (igaming) is online.

The responsibility for social media has moved out of the marketing department into the whole of the organization. Unless it is understood that social media is the underlying, critical success factor, casino operators will once again miss their chance in the online world.

For more information about Innovation Interactive, please contact Kimberly Arnold via [karnold@theinnovationgroup.com](mailto:karnold@theinnovationgroup.com) or contact Paul Girvan via [pgirvan@theinnovationgroup.com](mailto:pgirvan@theinnovationgroup.com)



# iGAMING NORTH AMERICA SHOW ANNOUNCED FOR 2013

*Planet Hollywood Las Vegas to be the Venue for 3rd Annual iGaming North America Conference - February 19 - 21, 2013*

On the heels of a 60% increase in attendance for our 2012 event, The Innovation Group is pleased to announce that it will once again co-produce the iGaming North America Conference in 2013.

At nearly 600 attendees, iGNA was the premier networking and educational event designed to introduce the land-based gaming businesses of North America to the global iGaming industry.

The event will be hosted at Planet Hollywood Resort & Casino in Las Vegas, February 19-21, 2013. February 19th will feature a half-day bootcamp and crash-course introductions to the iGaming industry. February 20th - 21st will feature finance, regulatory, legal and technical tracks, as well as sessions dedicated to social gaming.

In addition, the 2013 conference will feature:

- Mentoring Opportunities
- Rapid-Fire Sessions
- Expanded Expo
- New Networking Tools
- Return of the Visionaries & Veterans Panels

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The third annual iGaming North America is produced by The Innovation Group, Lewis & Roca, LLP, BolaVerde Media Group, and eGaming Brokerage.



Speaker and sponsorship inquiries are now being accepted via [www.igaming-northamerica.com](http://www.igaming-northamerica.com) or contact Kimberly Arnold via [karnold@theinnovationgroup.com](mailto:karnold@theinnovationgroup.com).

iGaming North America is proud to co-market our event with Reed Expo, the American Gaming Association and G2E.

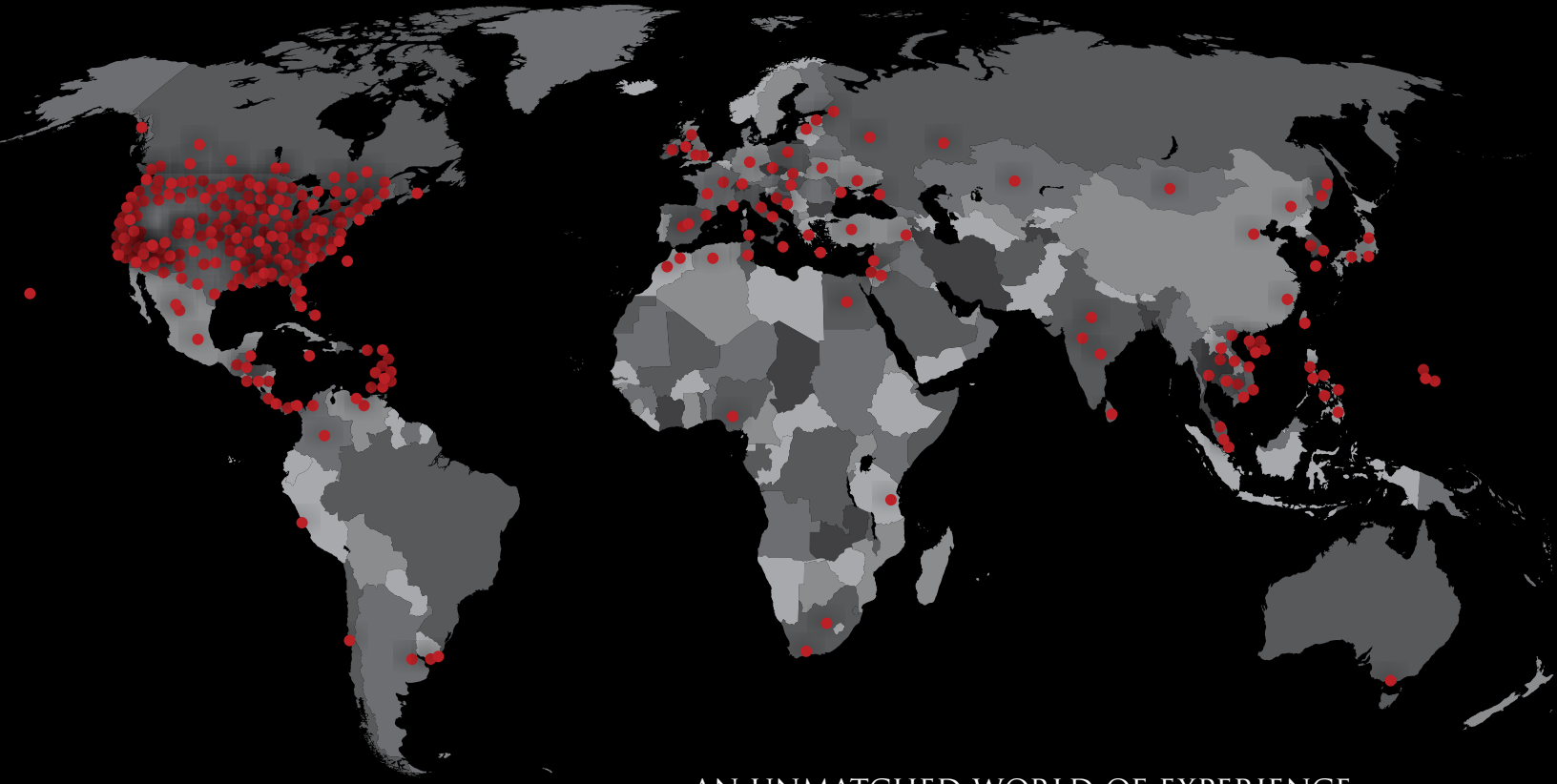


Register for the 2012 Global Gaming Expo via [www.igamingnorthamerica.com](http://www.igamingnorthamerica.com) today.

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