

# Service attributes of Casinos in Macau

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## Abstract:

Since the liberalization of the gaming industry in Macau in 2002, the gaming business has been growing rapidly. Being the most important service sector, the gaming industry has to strive its best to improve its service level continuously in order to gain and maintain a high competitive edge over the other competitors in the region. This is particular relevant as the industry is experiencing a slowdown in growth in 2012. This empirical study aims to reveal important service attributes as perceived by a group of experience casino employees. These service attributes are carefully reviewed and the rationale why a particular service attribute is important is discussed. Then ways to improve these service attributes are suggested. The service attributes revealed provide useful reference for the casino practitioners to improve service standard more effectively. Kano model is applied to study a selected group of unique casino attributes and their respective Customer Satisfaction Coefficients are calculated.

Keywords: Gaming Industry; Service attributes; Kano model; Customer satisfaction Coefficient

## Development of the Gaming Industry in Macau

Macau's licensed gaming business began in 1847. The first monopoly on casino was granted to Tai Hing Company in 1934. The casino monopoly franchise was changed to STDM in 1962 until 2001. In 2001, the Macau government terminated the monopolistic environment and planned to give out three licenses to increase competition. Currently there are six gaming concessionaries. The market share among the six gaming operators (Macao Daily Times, 2012 February 1) are: SJM 27%; Galaxy Entertainment Group 19%; Sands China Ltd. 19%; Melco Crown 13%; Wynn Macau 12%, and MGM China 10%. Before the liberalization, the number of gaming tables stood at 340 and it grew to 5498 in July 2012 (Macao Daily News, 2012 July 17). The slot machine number has increased from around 1,000 to over 17,000 during the period. The casino revenues in Macau first overtook that of Las Vegas Strip in 2007, and those of Nevada and New Jersey combined in 2009. In the 2012 policy address, the Macau Chief Executive Fernando Chui Sai On announced that while strengthening and deepening the stable development of the tourism and gaming industries, the government is moderately adjusting the growth of gaming industry. Stronger supervision of the gaming industry would develop and upgrade the integrated tourism relevant industries and promotes a diversified economy. The government has announced a maximum number of gaming tables, set at 5,500 within three years beginning in 2010, and strictly controls new casinos and gaming tables. The relevant bureaus also strictly regulate commission related to junkets (not to exceed 1.25% of the betting amount), and continues to strengthen video surveillance in casinos. By the

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end of 2012, the government will complete the auditing works of cage procedures operated by the six gaming concessionaires, and will encourage them to build internal surveillance systems in accordance to their own needs. In addition, the government will look to revise minimum internal surveillance requirements and strengthen financial audits in the six gaming concessionaires. The government would continue to promote the practice of responsible gaming (Jornal Do Cidadao, 2011 November 16).

### **Definition of Service**

A service is any activity or benefit that one party can give to another that is essentially intangible and does not result in the ownership of anything. Its production may or may not be tied to a physical product. Bill et al. (2006) define service as:

- (a) A set of functions offered to a user by an organization.
- (b) Results generated by activities at the interface between the supplier and the customer and by supplier internal activities to meet the customer needs.

Service has the following attributes:

- The supplier or the customer may be represented at the interface by personnel or equipment.
- Customer activities at the interface with the supplier may be essential to the service delivery.
- Service is intangible and as such cannot be stored.
- Delivery or use of tangible products may form part of the service delivery.
- A service may be linked with the manufacture and supply of tangible products.

The other attributes of service (Bill et al., 2006; Chatterjee, S., & Chatterjee, 2005; Koo, H. H. Y., 2008; Koo and Koo, 2007) include:

- Simultaneity in customer contact (involvement and participation)
- Intangibility (tangibility),
- Heterogeneity,
- Perishability
- Instorability
- Lack of formal customer specification
- Government may regulate
- Customer service is difficult to quantify
- Timeliness
- Inseparability of production and consumption (process)
- Human factors (People) and behavioral characteristics
- Facility related characteristics (Physical evidence)
- Service non-conformity characteristics
- Difficult to standardize and control service experience
- Quality of service is a perception

- Control and management of service require special skills and techniques
- Cannot be resold
- If not used it is lost
- Customer expectations are formed by word-of-mouth communications, personal needs, past experience, and what and how the employees of service provider communicates to the customer

Regarding service in the gaming industry, Dickie (2005) argues that successful casinos venue must deliver exemplary quality customer service. Customer service is the sine qua non of today's successful operations. It is extremely important to remember what the casino customer wants:

1. Casino customers want to be entertained.
2. They want to be appreciated.
3. They want the casino to care about them
4. They want to feel welcome in the casino.
5. They want to feel important.
6. They want respect for their privacy.
7. They want a quick and positive response if they have a problem.
8. They want an effective recovery from any service lapse on the part of staff.
9. They want service without having to ask for it.
10. They want customer-friendly facilities.

### **Attributes of Service Quality (SERVQUAL)**

Service quality reflects the extent to which a service meets customers' needs. A service is a means of delivering value to customers by facilitating outcomes customers want to achieve without the ownership of specific costs and risks (Sharon, et al., 2007). Service quality, as subjectively perceived by customers, involves a comparison of what they feel the service should be (expectation, E) with their judgment of the services they received (perceptions, P). It is the difference between customer expectations of service and perceived service. If expectations are greater than performance, then the perceived quality is less than satisfactory. Service plays an important role in providing value, and drives a company's success. Quality is not a singular but a multi-dimensional phenomenon. Service quality as the degree of discrepancy between customers' normative expectations for the service and their perceptions of the service performance (Sureshchandar, et al., 2001). Delivering quality service means conforming to customer expectations on a consistent basis. Understanding customer expectations and measuring the organization's performance in those aspects are crucial in building service quality (Koo and Koo, 2007). Service Quality is commonly measured by SERVQUAL questionnaire and is characterized by five dimensions, viz.: Tangibles, Reliability, Responsiveness, Assurance, and Empathy. Parasuraman, A., Berry, L. L., & Zeithaml, V. A. (1991), make suggestions on the nature, scope and limitations of SERVQUAL:

- 1) Minor modifications in the wordings are appropriate but deletion of items could affect the integrity of the scale
- 2) Context-specific items can be used to supplement SERVQUAL. Items similar in form to existing SERVQUAL items should be classified in the appropriate SERVQUAL dimension. Items that do not fit any of the five SERVQUAL dimensions should be treated separately.
- 3) SERVQUAL can be supplemented with any additional qualitative or quantitative research to uncover the underlying problem areas revealed by SERVQUAL.

In this respect, Koo (2008) proposes a revised SERVQUAL questionnaire to contrast the perceived best and worst casinos in Macau and called the questionnaire a contrast SERVQUAL and she further suggests to include eight Macau casino specific service items, i.e.:

- Location of the casino (i.e. convenience to customers)
- Casino bus service (e.g. convenience, frequency,...)
- Complimentary (e.g. ferry ticket, hotel,...) to customers
- Cashier service (cage)
- Free food and drink provided
- Quality & quantity of promotional materials
- Discounts/rebates on casino (dead) chips
- Performance & Entertainment show

### **Service Attributes under the Kano model**

Understanding the characteristics and effects of quality attributes is beneficial for improving management quality because one can select different strategies for different quality attributes and set priorities for service development. Some benefits include enhancing customer satisfaction and loyalty, which can minimize dissatisfaction. Typically the Kano model measure service along the following five dimensions (Oh, et al., 2011; Sauerwein et al., 1996; Zhao, et al., 2009; Mikulic, et al., 2011):

- (1) **Attractive quality (A)**. When present, customers are very satisfied; when absent, customers still accept this product/service attribute without being dissatisfied. Attractive requirements are neither expressed nor expected by the customer. Fulfilling these requirements leads to more than proportional satisfaction. "Attractive" attributes have low explicit "attribute importance" (AI), but high implicit AI.
- (2) **One-dimensional quality (O)**. When present, customers are satisfied. The intensity of this attribute varies. The higher is the quality, the higher the level of satisfaction and vice versa become. When absent, customers are dissatisfied. One-dimensional requirements are usually explicitly demanded by the customer. "One-dimensional" attributes with high importance have high explicit AI and high implicit AI and "one-dimensional" attributes with low importance have low explicit AI and low implicit AI.
- (3) **Must-be quality (M)**. Customers believe that this quality attribute is a necessity, and thus, when absent, they are dissatisfied. Customers take these for granted and are extremely

dissatisfied when these requirements are not fulfilled. “Must-be” attributes have high explicit AI, but low implicit AI.

(4) **Indifferent quality (I)**. Customers are indifferent to the presence of this quality attribute.

(5) **Reverse quality (R)**. When present, customers are dissatisfied and vice versa.

The category of the highest response frequency (i.e. the mode) determines each placement of the quality attribute in the classification scheme. If two or more of Kano’s categories are tied for a given quality attribute, the selected category would have the greatest impact on the products and services. It is determined based on the following order: M>O>A> I (Lee et al., 2011).

The advantages of classifying customer requirements by means of the Kano method include the followings (Matzler, et al., 1996):

- Product requirements can be better understood: the product criteria which have the greatest influence on the customer’s satisfaction can be identified. Classifying product requirements into must-be, one-dimensional and attractive dimensions can be focused on.
- Priorities for product development can be determined. It is not useful to invest in improving must-be requirements which are already at a satisfactory level but better to improve one-dimensional or attractive requirements as they have a greater influence on perceived product quality and consequently on the customer’s level of satisfaction and retention.
- Kano’s method provides valuable help in trade-off situations in the product development stage. If two product requirements cannot be met simultaneously due to whatever reasons, the criterion which has the greatest influence on customer satisfaction can be identified.
- Must-be, one-dimensional and attractive requirements differ, as a rule, in the utility expectations of different customer segments. Customer-tailored solutions for special problems can be elaborated which guarantee an optimal level of satisfaction among the different customer segments.
- Discovering and fulfilling attractive requirements creates a wide range of possibilities for differentiation. A product which merely satisfies the must-be and one-dimensional requirements is perceived as average.

In addition the Customer Satisfaction (CS) Coefficient for satisfaction and Customer Satisfaction (CS) Coefficient for dissatisfaction can be computed to provide more insight about the service attribute. According to Matzler et al., (1996), the CS-coefficient is indicative of how strongly a product feature may influence satisfaction or, in case of its “non-fulfillment”, customer dissatisfaction. To calculate the average impact on satisfaction it is necessary to add the attractive and one-dimensional responses and divide by the total number of attractive, one-dimensional, must-be and indifferent responses. For the calculation of the average impact on dissatisfaction one should add the must-be and one-dimensional responses and divide by the

same normalizing factor::

$$\text{CS Coefficient for satisfaction} = (A+O) / (A + O + M +I)$$

$$\text{CS Coefficient for dissatisfaction} = - (O + M) / (A + O + M + I)$$

A minus sign is put in front of the CS-coefficient of customer dissatisfaction to emphasize its negative influence on customer satisfaction if this product quality is not fulfilled. The positive CS-coefficient ranges from 0 to 1. The closer the value is to 1, the higher the influence on customer satisfaction. A positive CS-coefficient which approaches 0 signifies that there is very little influence. For the negative CS-coefficient, if it approaches -1, the influence on customer dissatisfaction is especially strong if the analyzed service feature is not fulfilled. A value of about 0 signifies that this feature does not cause dissatisfaction if it is not met. The CS Coefficient for satisfaction can suggest attributes that can increase customer satisfaction. The CS Coefficient for dissatisfaction can be used to indicate attributes whose absence decreases customer satisfaction. In terms of CS Coefficient for satisfaction and CS Coefficient for dissatisfaction, when the value is close to 0, the effect of the attribute is low. When it is close to 1, the attribute has a positive effect on increasing customer satisfaction; when it is close to -1, the attribute can decrease customer dissatisfaction. Attention should be paid to attributes with indices with large magnitudes (Bayraktaroglu and Özgen, 2008; Lee, et al., 2011; Matzler, et al., 1996)

Since most of the requirements are one-dimensional, to see how close each one-dimensional requirement is to “attractive” or “must-be” characteristics, the frequencies of “one-dimensional” responses are eliminated from the equation by adding CS coefficients for satisfaction and dissatisfaction together. If the sum of the CS coefficients is positive, the requirement is reckoned to be closer to attractive characteristics. If it is negative, then the requirement is seen to be closer to must-be characteristics. The higher the absolute value of the sum, the more the requirements reflect the must-be or attractive characteristics (Bayraktaroglu and Özgen, 2008):

$$\text{The sum of the CS coefficients} = (A-M)/(A+O+I+M)$$

**Table 1: Kano evaluation table**

Customer requirements		Dysfunctional (negative) question				
		1 like	2 must-be	3 neutral	4 live with	5 dislike
Functional (positive) question	1 like	<b>Q</b>	<b>A</b>	<b>A</b>	<b>A</b>	<b>O</b>
	2 must-be	<b>R</b>	<b>I</b>	<b>I</b>	<b>I</b>	<b>M</b>
	3 neutral	<b>R</b>	<b>I</b>	<b>I</b>	<b>I</b>	<b>M</b>
	4 live with	<b>R</b>	<b>I</b>	<b>I</b>	<b>I</b>	<b>M</b>
	5 dislike	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>Q</b>
A=Attractive; I=Indifferent; M=Must-be; O=One-dimensional; Q=Questionable; R=Reverse						

A total of 119 university students took part in scoring the six service attributes of casinos in

Macau. About one third of them are working in the casinos and the other two thirds are mature students studying for a degree during their spare time. The multi-voting was done in the classes by show of hand against each service attribute. The attributes selected were discussed among some experienced casino employees and were modified from the study on contrast SERVQUAL by Koo (2008). The participants also brainstormed a comprehensive list of service attributes for casinos in Macau (see Appendix 1). The results using Kano model are summarized in Table 2.

**Table 2: Scoring of service attributes of casinos in Macau**

	A	O	M	I	R	Q	Category	CS Satisfaction	CS Dissatisfaction	Sum of CS
Casino decoration	47	25	43	27	3	0	A	0.507	-0.479	0.028
Variety of games	11	39	48	43	3	0	M	0.355	-0.617	-0.262
Service standard	61	33	47	7	0	0	A	0.635	-0.541	0.094
Location & transportation	17	25	59	43	0	0	M	0.292	-0.583	-0.291
Rebates & complimentary	41	26	46	37	2	0	M	0.447	-0.480	-0.033
Free food and drink	36	31	42	36	3	0	M	0.462	-0.503	-0.041
Entertainment show	12	18	38	70	6	1	I	0.217	-0.406	-0.189

It is interesting to note that “free entertainment show” is reckoned as an Indifferent service attribute in casinos. The casino operators should review whether to continue providing free entertainment in their premises, or to divert the resources to something more attractive to the customers. The fact that “casino decoration” and “Service standard” are viewed as Attractive attributes, justifies why the operators are investing so heavily in providing deluxe casino decoration and in enhancing their service standards. The other four attributes (viz., Variety of games, Location & transportation, Rebates and complimentary, Free food and drink) are “Must-be” attributes. Customers tend to take these Must-be service attributes for granted and if these were absent they would be dissatisfied. However enough is enough. Similar to the hygiene factors under Herzberg’s two factor theory, no additional benefit would be gained by providing more on these “must-be” service attributes after having reached the threshold point.

The CS-coefficient for satisfaction indicates how strongly a service feature may influence customer satisfaction. In descending order of CS satisfaction coefficients are listed in Table 3

below.

**Table 3: Descending order of CS coefficient for satisfaction**

Service standard	0.635
Casino decoration	0.507
Free food and drink	0.462
Rebates & complimentary	0.447
Variety of games	0.355
Location & transportation	0.292
Entertainment show	0.217

In order to satisfy the customers the casinos should focused in improving their “service standard” which has the largest CS Coefficient of 0.635. As the term “service standard” is rather vague, more in-depth studies should be conducted to explore how “service standards” are being measured. In this respect, the contrast SERVQUAL questionnaire may be deployed. The least important service attribute revealed in Table 3 is “Entertainment show”. For those casinos now providing “Entertainment show”, their management should review whether to continue the provision of this service attribute. The range of CS Coefficients for satisfaction is 0.418 and this suggests that the relative extent of influence among these six attributes is rather large.

Similarly the CS Coefficient for dissatisfaction is listed in Table 4. The negative CS-coefficient for dissatisfaction suggests the extent of influence on customer dissatisfaction if the respective service attribute is not fulfilled. Inadequate “variety of game” is the most important attribute to avoid customer dissatisfaction. The range of CS Coefficients for dissatisfaction is only 0.211 and this suggests that the relative extent of influence among these six attributes is not really big.

**Table 4: Descending order of magnitude for CS coefficient for dissatisfaction**

Variety of games	-0.617
Location & transportation	-0.583
Service standard	-0.541
Free food and drink	-0.503
Rebates & complimentary	-0.480
Casino decoration	-0.479
Entertainment show	-0.406



Table 5 summarizes the descending order of the sum of the CS coefficients. If the CS Coefficient is positive, the attribute is considered to be closer to attractive characteristics. If it is negative, then the attribute is seen to be closer to must-be characteristics. The higher the absolute value of the sum, the more the requirements reflect the must-be or attractive characteristics.

**Table 5: Descending order of magnitude for Sum of CS coefficient**

Service Attribute	Category	Sum of CS Coefficients
Service standard	A	0.094
Casino decoration	A	0.028
Rebates & complimentary	M	-0.033
Free food and drink	M	-0.041
Entertainment show	I	-0.189
Variety of games	M	-0.262
Location & transportation	M	-0.291

## Conclusion

In a competitive business environment, it is of utmost importance for the service provider to:

- be aware of the service dimensions, which is important to its targeted customers.
- know the importance given by their preferred customers to each of the service dimension.
- know the exact attributes, which make the service dimensions.

This paper aims to outline some common approaches used to study the service attributes of casinos in Macau. As the common sense statements go:

- What you measure is what you get.
- If you cannot measure it you cannot manage it.
- You cannot measure what you cannot describe
- If you have not measured it you have not managed it

In short, measurement is tantamount to management. If we agree that excellent service is important to the success of a casino, then there should be no excuse for the management of casinos to measure and manage their service seriously. The service aspects are many and varied (please refer to Appendix 1) and further studies should be conducted to examine the various unique casino attributes.

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### Unique service attributes of casinos in Macau listed in descending order of perceived importance

Perceived Importance Score (9=most important, ..., 1=least important) through multi-voting by a group of experienced front line employees working in casinos

Perceived Importance Score	WHAY	WHY	HOW
9	<b>Smiling may not be right at all times</b> ( do the right thing at the right time)	If a customer has a bad mood, smiling may cause some undesirable results.	Being sensitive to the situation. Smiling is appropriate when greeting customers and congratulating them for winning.
8	<b>Professional Knowledge</b> (To solve problems for customers)	When customers have problems the front line colleagues should be knowledgeable to assist.	Wearing proper staff uniform. Demonstrating professional knowledge. Attending training courses.
8	<b>Professional Skills</b> (To develop good relationship and trust with customers)	Good customer relationship will facilitate smooth operations	Attending relevant training programmes to enhance professional skills
7	<b>Professional integrity</b> (To make customer feeling safe)	Good atmosphere can be developed	Being fair and consistent in dealing with customers.
7	<b>Be patient</b> (Handle customer problems with patience and sincerity)	To make customers feel important and respected	No discriminating expression and do not make unnecessary remarks
5	<b>Language proficiency</b> (Be able to communicate with foreign customers to understand their needs)	Most customers are coming from outside Macau and they have language difficulties	To communicate in customers' languages

4	<b>Be observant</b> (to deliver excellent service through proactively detecting customer need)	To deliver prompt and appropriate services to customers	Observing diligently and sensitively
4	<b>Courtesy</b> (Be polite to make customers feel important)	To portray a good impression to customers to enhance good relationship with them	Building good service attitude
3	<b>Being proactive</b> (Help customers proactively)	To understand customer needs and to solve their problems	Being sensitive and being willing to serve
3	<b>Positive attitude</b> (Be active to serve customers)	To make customers feel comfortable and relaxed	Providing efficient services
3	<b>High Emotional Quotient</b> (EQ) (Essential in the gaming industry)	Front line colleagues may get unreasonable complaints from customers	Not to argue with customers but to seek support from superiors
3	<b>Teamwork</b> (To reap synergetic benefits)	Good cooperation among employees would enhance chances of success	Being cooperative with each other and having clear team objectives
3	<b>Comfortable environment</b> (To retain customers to play longer in the casinos)	To make customers feel relaxed	Providing a clean and relaxed atmosphere through proper lighting, music, entertainment,... etc.
3	<b>Security</b> (High tech security system and professional security guards)	To ease off customers' concern on safety	Having Security guards suitable located in the casinos.

2	<b>Service attitude</b> (Employees being committed to service customers)	Enhancing service capability to attract and retain customers	Through service training programmes and empowerment
2	<b>Care and Concern</b> (Make customers feel like VIP)	To enhance good customer relationship	Cultivating a service oriented atmosphere through service and quality initiatives
2	<b>Neat staff uniform</b> (Front line staff appearance help portray a proper image in the mind of the customers)	Staff appearance is part of the Physical Evidences in the 7P model	Ensuring employees wear neat, tidy, and clean uniform. Staff grooming is pleasing and appropriate.
2	<b>Understanding customer needs</b> (To deliver services that customers need to create a good impression)	To make customers feel like being at home	Standing in the shoes of the customers in service delivery
2	<b>Responses to customers</b> (Mutual interaction with customers)	To make customers feel important and being respected	Practicing effective communication with customers
2	<b>Around the clock Service</b> (Casino service is available 24 hours a day)	To provide convenience to customers	Having an effective round the clock roster scheme
1	<b>Serve with passion</b> (To make customer feel important)	To attract customers to come back again	Serving sincerely with appropriate smile
1	<b>Calm</b> (To enhance customers' confidence on casino)	Various unexpected problems may occur because all types of persons are present in casino	Staying calm when chaos occurs

1	<b>Personalized service</b> (To make customers feel like VIP)	To retain VIP customers and promote good words of mouth among them	Tailor–designing effective and efficient service for VIP customers
1	<b>Casino Coaches</b> (To provide convenient transportation service to prospects and customers)	To provide convenience to customers so as to increase the number of patrons to the casino	Developing and maintaining a frequent, fast, and flexible point to point transportation schedule
1	<b>Staff Roster</b> (Adequate rest so that employees can delivery excellent customer service)	To equip proper and adequate manpower to provide round the clock service	Maintain an eight–hour working roster to provide good customer service at reasonable cost
1	<b>Complimentary rebate</b> (Promotional item, ferry tickets, hotel rooms, lucky draw, rebates,...)	Complimentary items are part of the price strategy in the marketing mix of a casino	Developing a good and effective customer loyalty programme to maximize business opportunities.
1	<b>Cleanliness</b> (To provide a comfortable environment for the customers)	A clean environment helps attract and retain customers	Having a frequent and effective cleaning service to keep the environment clean and tidy
1	<b>Surveillance</b> (High tech surveillance monitoring system)	To monitor staff and customer statuses. Record unusual events on video for subsequent control	Having a 24 hour surveillance system with comprehensive coverage to protect the interest of customers, employees, and the casino.
1	<b>Fraud Prevention</b> (High tech surveillance and round the clock monitoring)	To protect the interest of customers, employees, and the casino. To avoid cheating. To protect customers when disputes arise.	To develop, maintain, and improve fraud prevention measures regularly.

**Other casino attributes listed in alphabetical order include:**

- A place for sudden rich;
- Automation;
- Casino turnover not necessarily tied with scale of operations
- Customers and Casinos are in opposition
- Free admission;
- Free drinks;
- Free entertainment;
- Free transportation;
- Gaming business is seasonal;
- Government supervision;
- High degree of discipline;
- Illegal money lending;
- Large cash transaction;
- Luxurious decoration;
- No ownership;
- No photographing;
- Noisy;
- Oligopoly;
- Plenty of ATM machines;
- Plenty of pawn shops around;
- Polluted air;
- Service chain;
- Service Formula  $100-1 = 0$ ;
- Service is a people business;
- Service is a process;
- Service standard can be affected by other present in the environment;
- Service theatre;
- SERVUCTION (Service and Production);
- Variety of gaming choices for customers