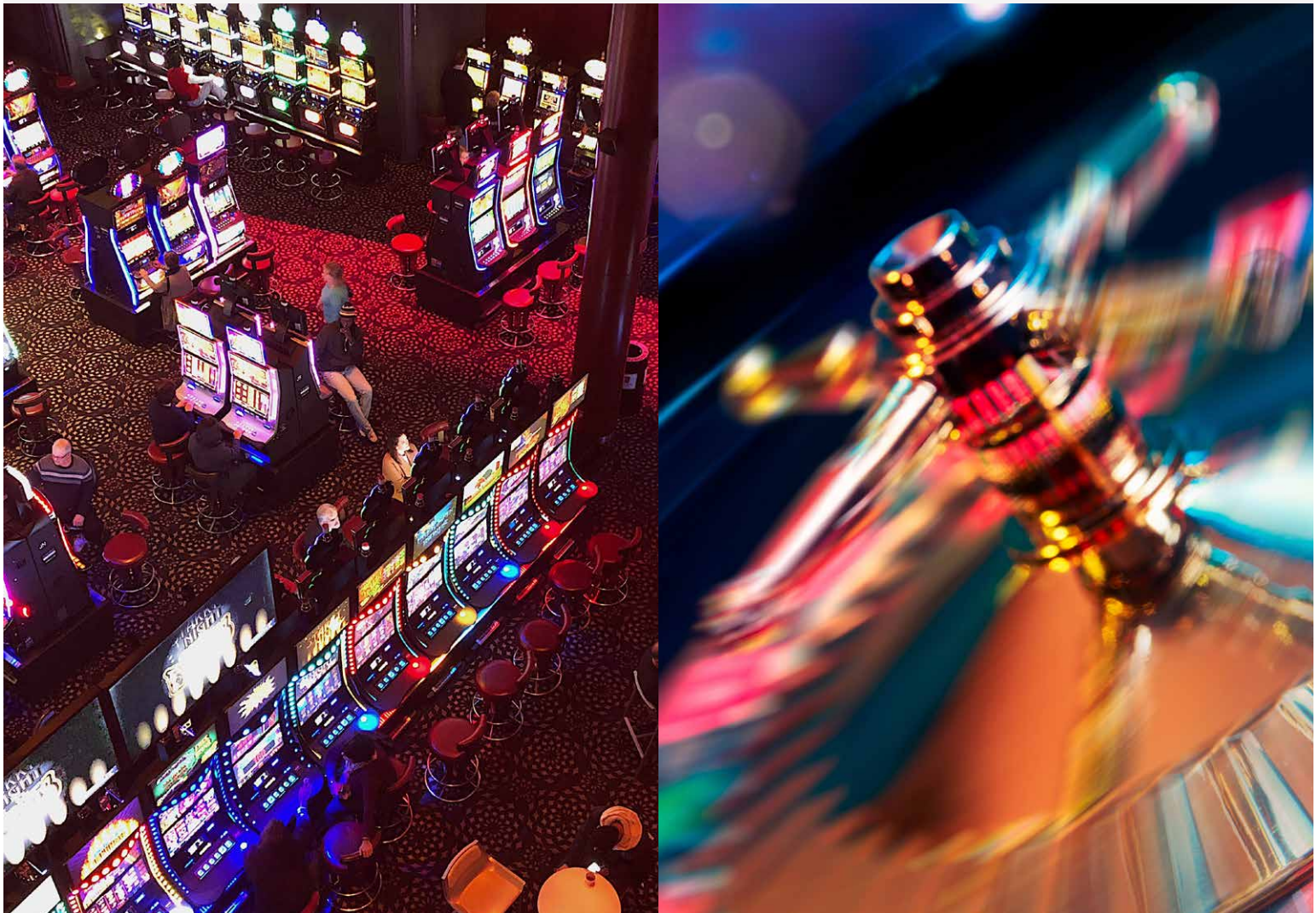


MARKET INSIGHTS:

# Tribal Casino Surveillance and Security



The current perceptions, wants and needs of casino surveillance from tribal security leaders.

January 2022



**SYNECTICS**



# WELCOME

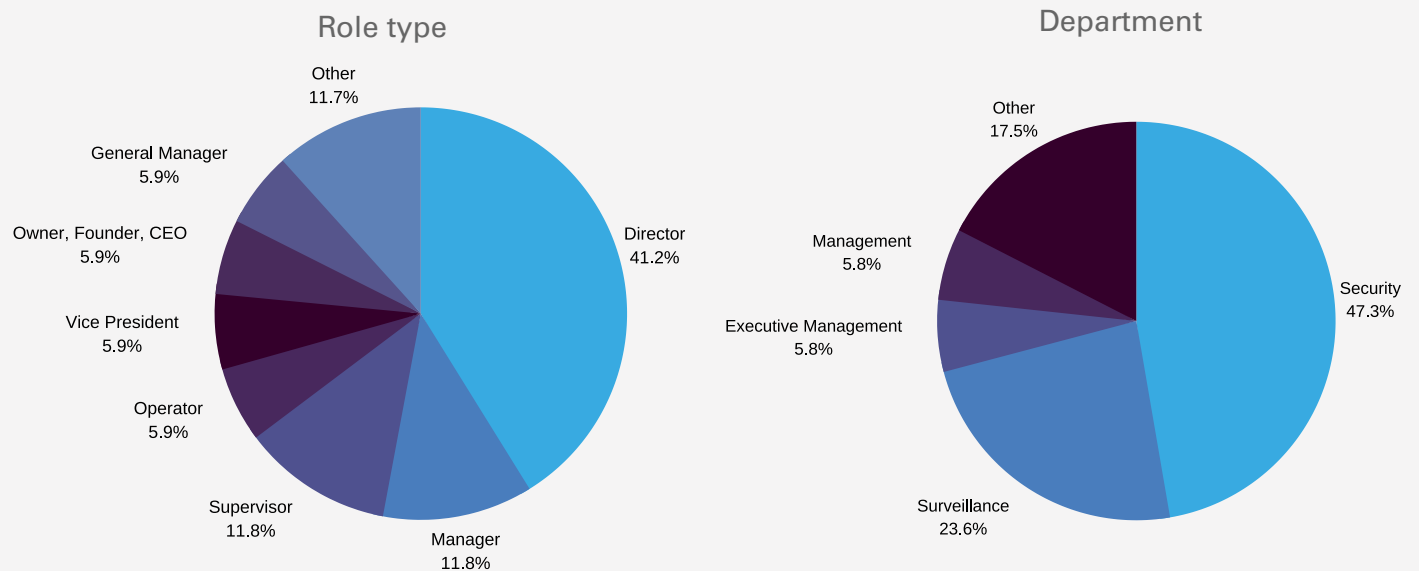


This report summarises findings from a focused piece of research with a small set of tribal casino operators and owners. Results were collated and analysed in collaboration with Synectics and Native Nation Events.

The aim of the research was to help understand current gaming surveillance and security experiences within the industry, and identify emerging technology trends and priorities. The findings are from fifteen key industry stakeholders, who gave their views on the current state of technology as well as their future requirements and needs.

We hope the report will provide you with an interesting snapshot of the current marketplace and useful insights into the future technologies likely to play a key role in day-to-day casino surveillance operations.

## WHO RESPONDED?



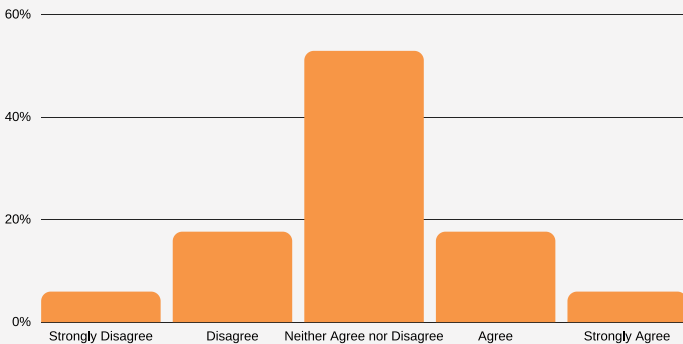


# CURRENT EXPERIENCE WITH SURVEILLANCE SYSTEMS



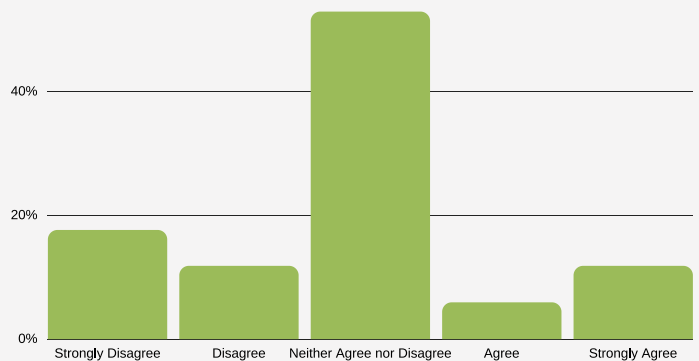
## DETECTING THREATS

My current surveillance system does a great job of detecting potential threats.



## COLLABORATING

My current surveillance technology is highly effective at alerting and collaborating with first responders when required.



While the majority of respondents gave their current surveillance systems average or good marks, nearly a quarter did not think their current system did a great job at threat detection. And a quarter didn't think it supported them effectively in collaborating with first responders (the majority of these felt strongly about this).

“

My current surveillance system really lacks in all areas of operation.

”

“

It's good at detecting threats because of our staff, the system, its coverage and our training.

”

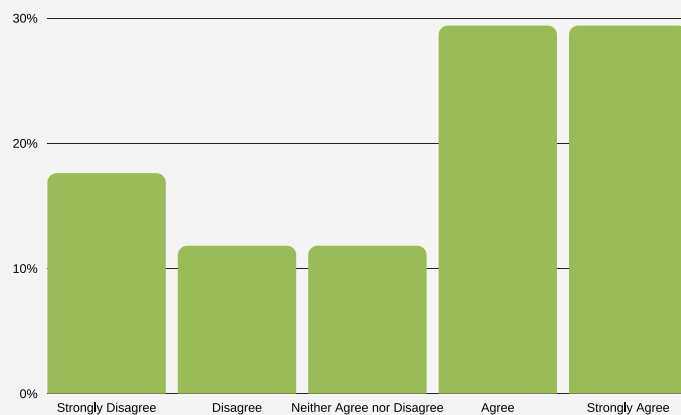
# FUTURE SURVEILLANCE TECHNOLOGY NEEDS



As security threats become more sophisticated, systems will need to adapt to compete. We looked at which emerging technologies were most important to our respondents.

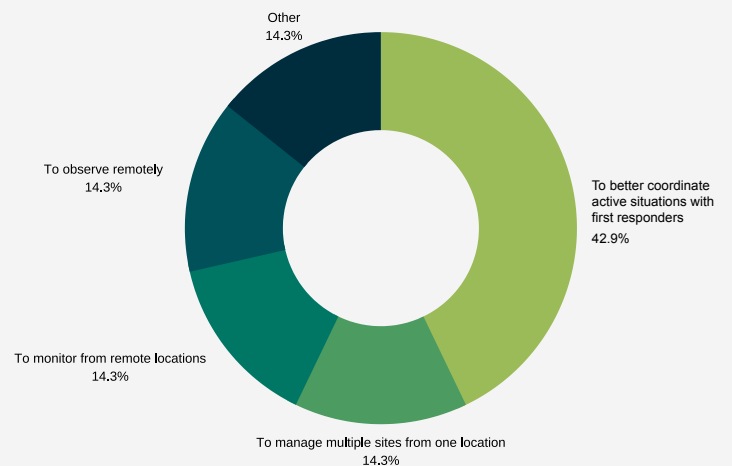
## REMOTE MONITORING

Remote monitoring of our surveillance systems is important to our future operations.



## WHY IS IT IMPORTANT?

You've stated that remote monitoring is important to your future operations. Why is this?



“

Remote monitoring is important to better coordinate active situations with first responders.

”

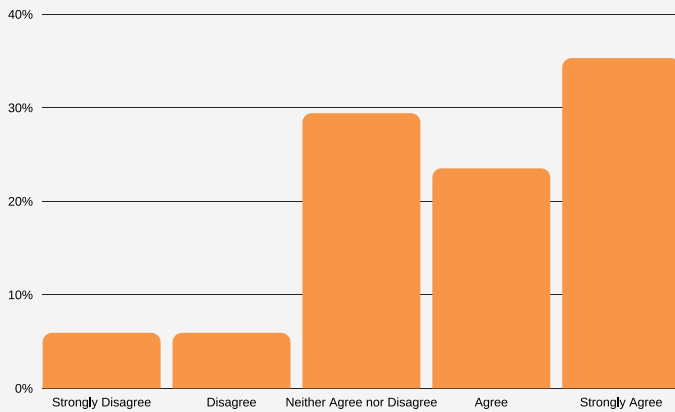
“

We currently don't allow remote monitoring of our surveillance system.

”

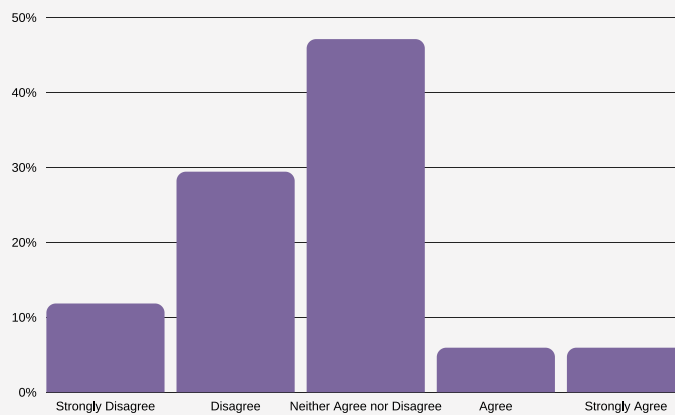
## ANALYTICS AND AI

Analytics/AI is an important advancement for our surveillance system to help identify and prevent threats.



## CLOUD SURVEILLANCE

Cloud surveillance is a technology that we are keen to adopt in the future.



Remote monitoring and AI came out as the most popular technological developments for our respondents. The pandemic has highlighted how important remote monitoring could be to casinos, but the most common reason given for future remote monitoring was to better collaborate with first responders. Considering less than one third of people we spoke to thought their system was effective at collaboration, this is perhaps unsurprising.

The organisations we surveyed were not enthusiastic about adopting cloud technology. This was the case for over 40% of respondents. This may present a challenge to in-house security teams and technology providers looking to improve security and operational management.

“

It is very important to know when a person comes into your business and has a gun or weapon. The system is just not as far advanced as I would like it to be.

”

“

Facial recognition and analytics are essential to help identify undesirables.

”

“

AI and access control expansion are both important.

”

“

I would like better facial recognition and analytics.

”





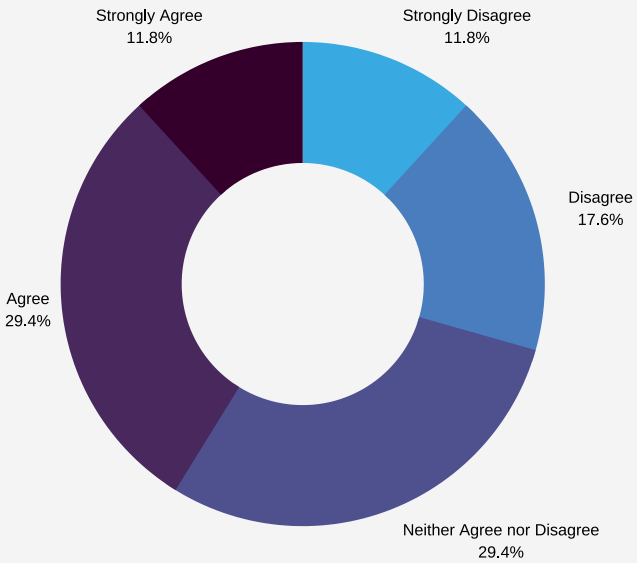
# MANAGING THREATS, COMPLIANCE AND RISK



Casino surveillance systems play a key role in managing risk in a highly regulated industry. These risks can come in a variety of forms, such as cyber, legal or physical. Surveillance systems therefore need to be robust and able to swiftly adapt.

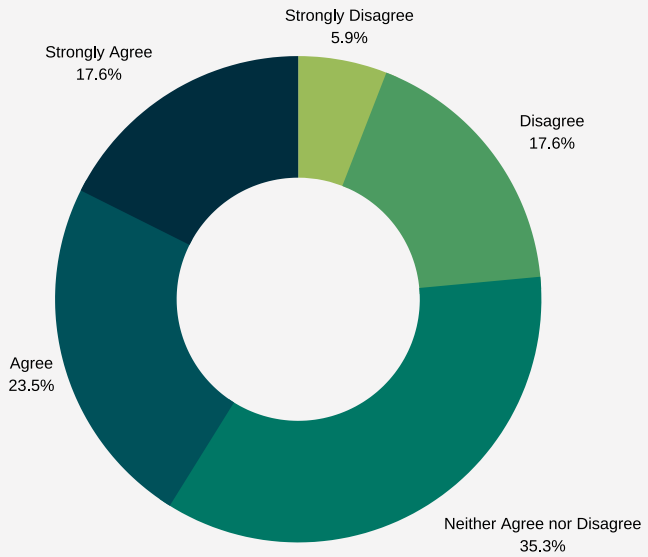
## CYBERSECURITY

Our surveillance technology and processes are prepared to manage cybersecurity threats.



## COMPLIANCE

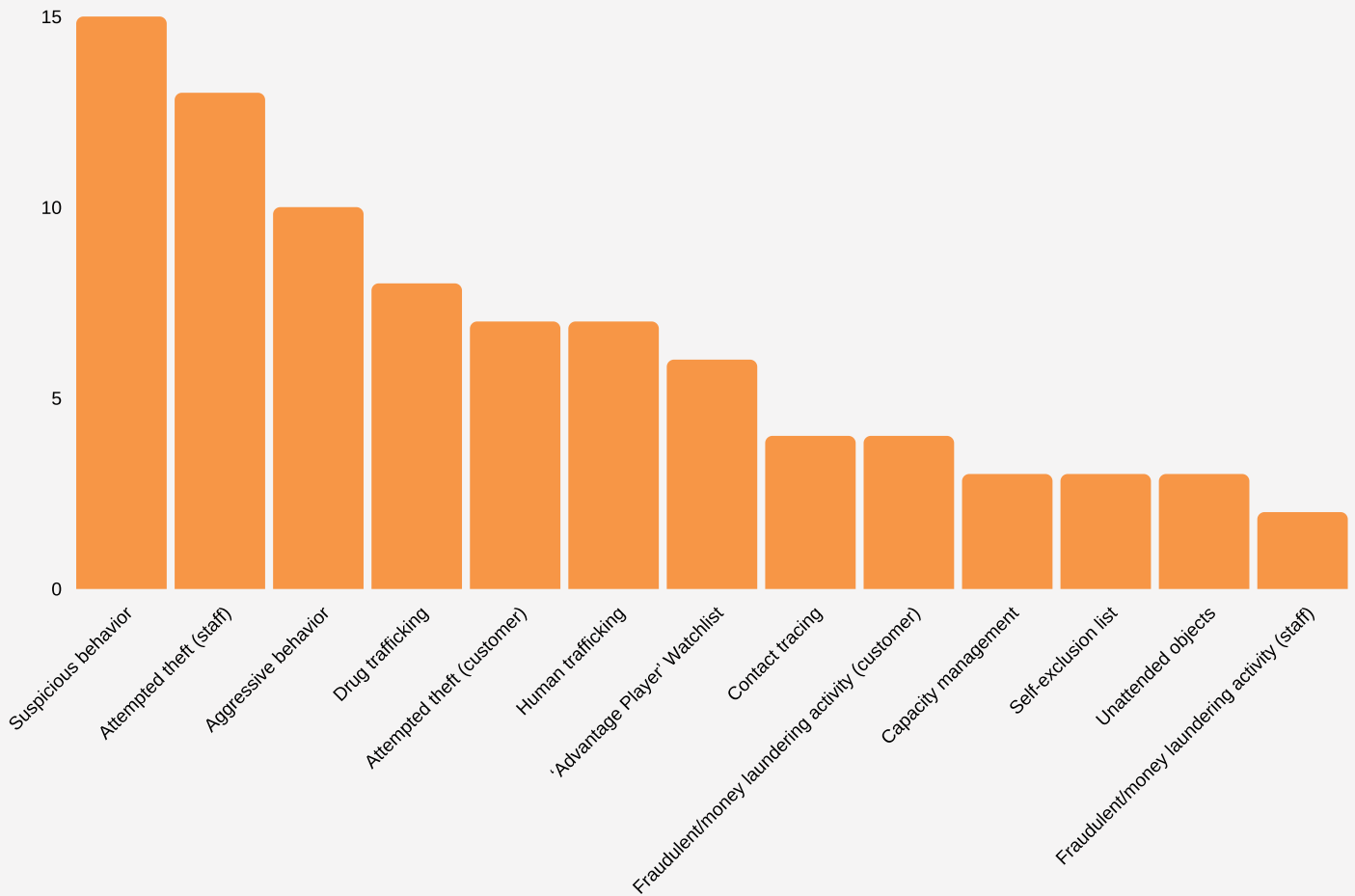
Our current surveillance system easily adapts to evolving gaming compliance and regulation requirements.



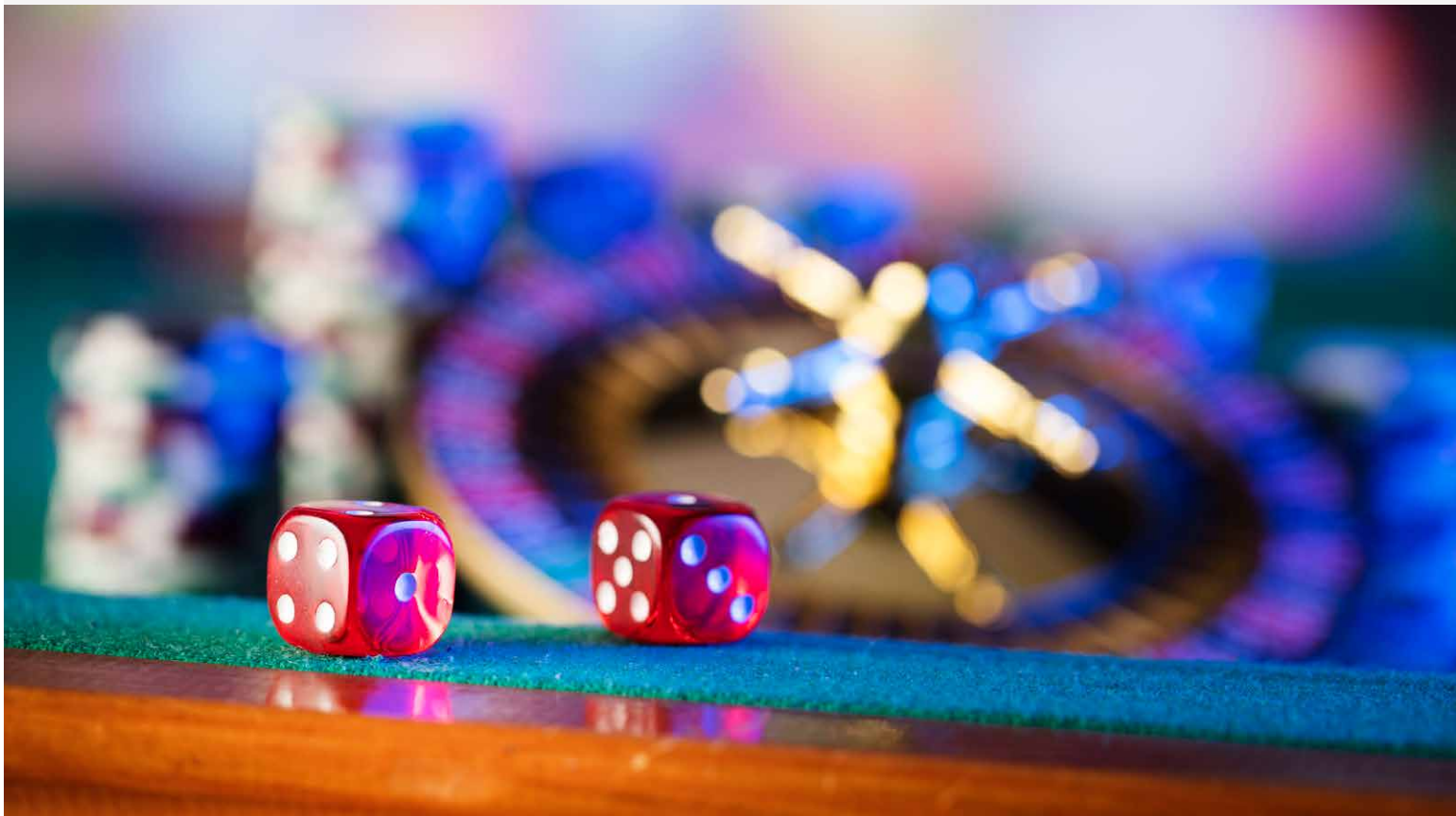
The majority of respondents felt that their system is prepared to manage threats and regulatory changes. However, at a time when the number of cyber attacks has been growing exponentially, more than a quarter of respondents said their system is ill-prepared to manage this threat. More than half of the people we surveyed had not upgraded or replaced their system in the past five years, therefore, the age of the surveillance system could have an impact on security and regulatory management.

## RISK

Which of the following are the risks that you want your surveillance system to detect and mitigate?



The top three risks respondents wanted their surveillance systems to detect were suspicious behaviour, attempted theft by staff and aggressive behaviour. Perhaps surprisingly during a pandemic, capacity management and contact tracing were quite far down the list of priorities.

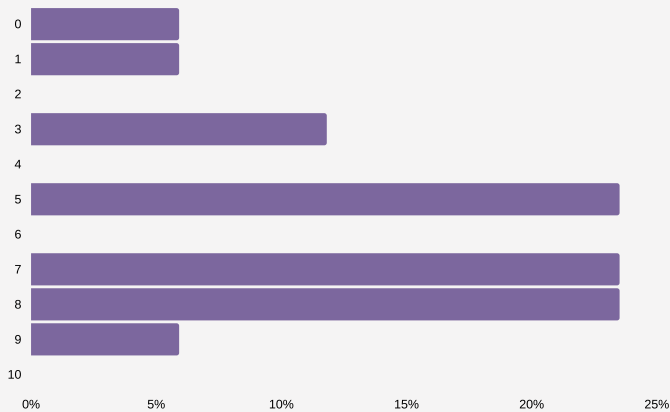


# SYSTEM USABILITY AND RELIABILITY

We asked casinos what they thought of their current system in terms of user experience and reliability. Given surveillance downtime can lead to regulatory fines, this is particularly important.

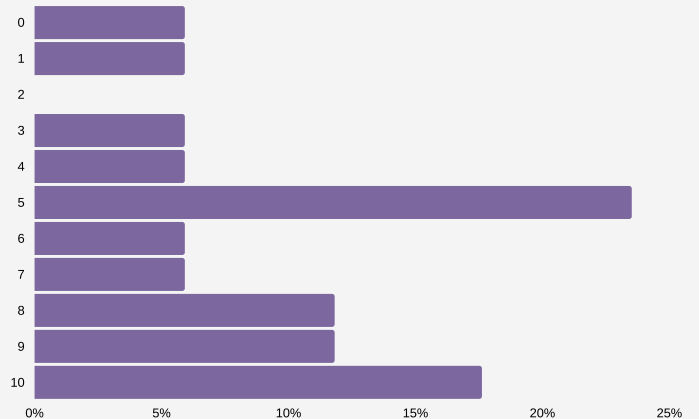
## USER EXPERIENCE

Out of 10, rate your current surveillance system's user experience.



## RELIABILITY

Out of 10, rate your surveillance system's reliability.



“ I would like more flawless software updates. ”

“ Alarms detected during off hours. ”

There was a correlation between those respondents who had recently replaced or upgraded their system, and higher ratings for user experience and reliability. People with newer systems gave an average rating of 7 and 9 for user experience and reliability, respectively. This is compared to an average rating of 4 in both categories for casinos that hadn't upgraded in the past five years.



# CONCLUSION

The industry has had to adapt to evolving situations. Whether it's a global pandemic, or changing regulations, casinos need the necessary tools at hand to support operations. There's a clear appetite for analytics and AI among tribal security and surveillance leaders.

Respondents were also keen on remote monitoring, largely to collaborate better with first responders. At the same time, they were actively against cloud adoption. There is a disconnect here, since the cloud is ideally suited for remote viewing and collaboration with third parties.

Perhaps the cyber security concerns expressed by respondents have combined with the still widespread misconception that moving to the cloud opens an organisation up to cyber attacks. In reality, cloud offers an extremely high level of protection, as well as easy access to the latest features and cybersecurity updates. In addition, there is less hardware to maintain and integration with other technologies is simpler.

It's understandable that there's reluctance to move to the cloud but it could be the answer to supporting emerging needs as well as addressing cyber security challenges.



Synectics is a leader in the design, integration and support of advanced security and surveillance systems that enable clients around the world to protect their people, communities, and assets.

Founded over 30 years ago, Synectics has deep industry experience across gaming, energy, urban transport, public space and critical infrastructure projects. The group's expert engineering teams work in partnership with customers to create integrated product and technology solutions, proven in the most complex and demanding operating environments.

Synectics' Systems division is part of Synectics plc, a global leader in advanced surveillance, security and integration technologies and services.

## Synectics

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