

Raving **NEXT**

Raving NEXT Think Tank Report *Survey Data & Challenge Results*

January 28 - 30, 2019

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About Raving NEXT Think Tank

The idea for the Raving NEXT Think Tank started in 2017 as Deana Scott, Raving CEO, noted the diverse knowledge of the individuals in attendance at our Indian Gaming Analytics & Marketing Conference. As she looked around, she realized that there were three experts on stage, but the audience was filled with experienced gaming executives who had worked through some very tough challenges in their gaming careers. And these “boots on the ground” folks had some really valuable insight into future trends. Since then, Raving has tapped into the expertise in the room to help solve many common industry issues by connecting gaming executives through this round table exercise. On Monday, January 28, 2019, you were a part of the second Raving NEXT Think Tank.

Why is this important ...

Deana began working in Indian Gaming and Tribal economic development nearly 24 years ago. When she started in this industry, she worked for the Coquille Tribe, her husband and kids’ tribe, and she realized, “If I do a good job, my kids will benefit. But as I began to work in the industry, I realized that if I did a good job my kids’ kids would benefit and the community would benefit. And because I was encouraged to be innovative and think of future generations in my decision-making, I know we changed lives.”

The attendees sitting in the audience were told, “You are a voice for change and innovation in our industry. It doesn’t matter what your title is, whether you are at a large or small property. What matters is that you are here. What matters is that you got out of bed and showed up very early on a Monday morning to guide our industry into the future. We are in the casino and hospitality industry and although we must be strategic and analytic, we can’t forget people visit us to get away from the worries of the day and have some fun.”

How it worked ...

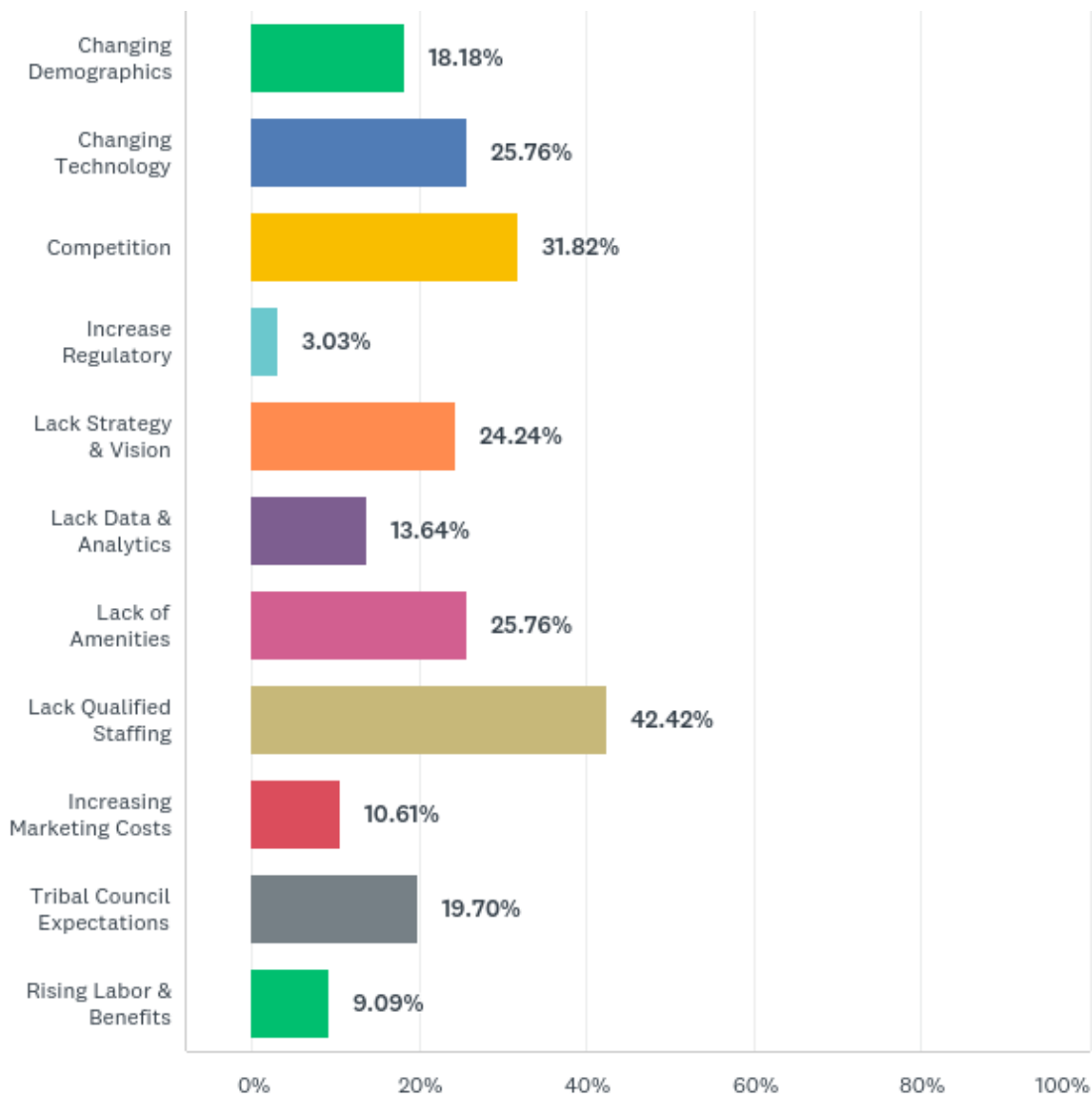
Every Raving NEXT attendee was asked to participate in a State of the Industry Survey prior to the conference. We used the results of this survey to guide the discussion and set up six challenges based on the feedback from the survey. We

took the top six issues that these attendees told us they were facing currently at their properties. Attendees were asked to discuss and develop the solutions within small groups; their ideas and feedback were shared that morning and the results have been compiled in this report so that each attendee can utilize this information to continue to work on solutions and build opportunities for their tribes. The survey had a 66% response rate.

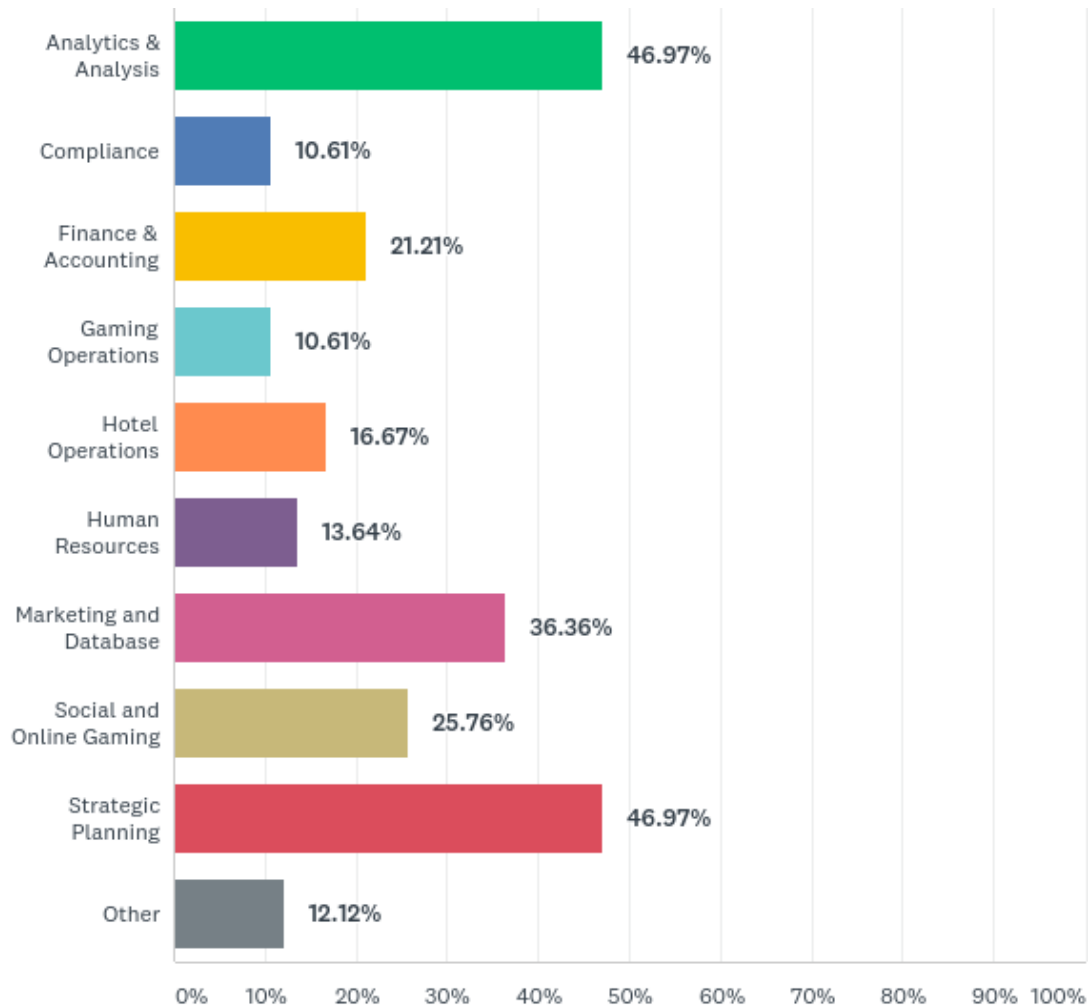
Pre-Conference Survey Results

Prior to Raving NEXT, January 28-30, 2019, at Pechanga Resort Casino, we asked all attendees to complete a nine-question survey. Of the 99 attendees that attended, 66 completed the survey (66% response rate). Here are the results:

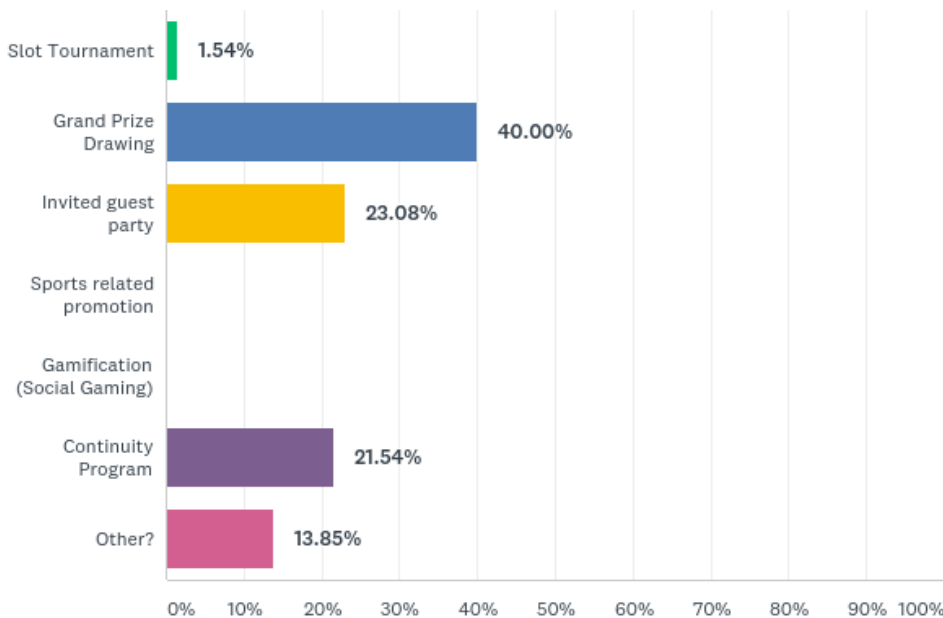
Q1: What do you see as the biggest issue facing Indian Gaming? (select up to three)



Q2: Select three areas of expertise you wish you had more of at your property:



Q3: What was the marketing promotion that drove the most ROI within the last 12 months?



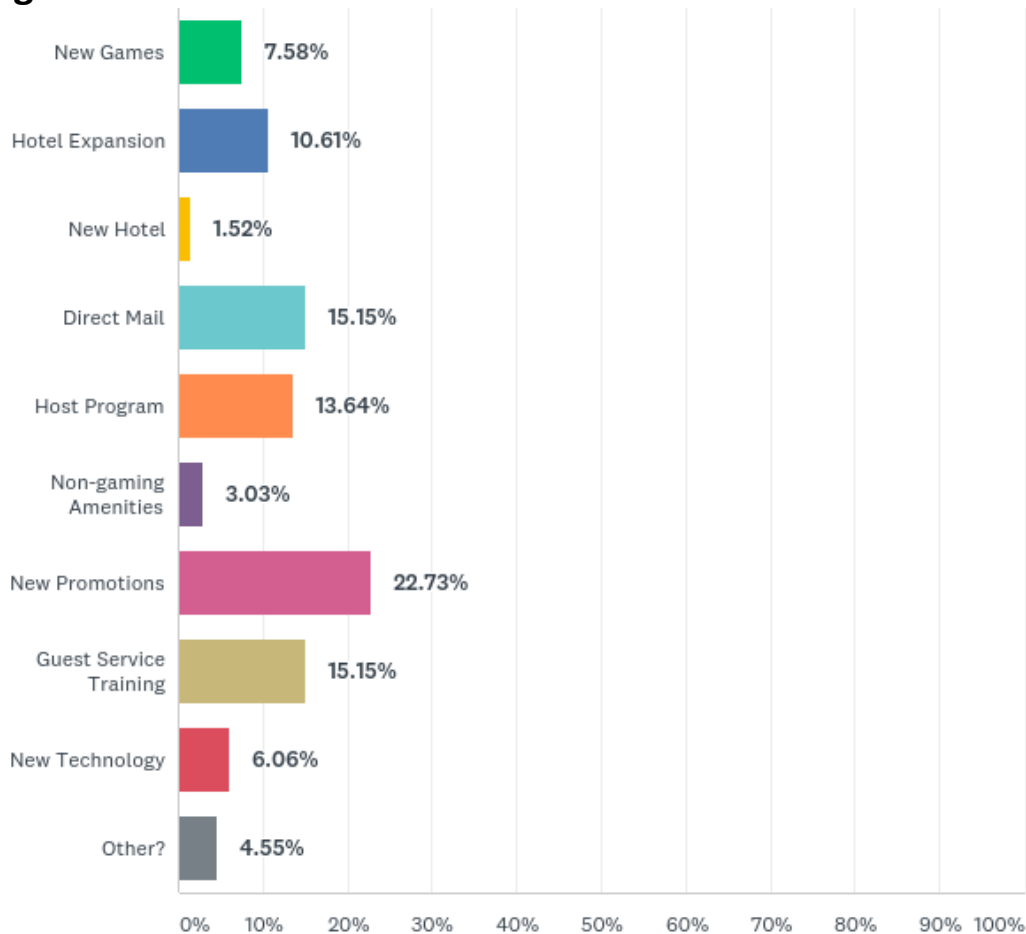
Q4: Based on your answer to the previous question, why do you feel this promotion was a success? (please describe below)

#	RESPONSES	DATE
1	There was several Cash giveaways, and patrons had to be actively playing slots in order to win cash.	1/18/2019 2:00 PM
2	Attracted clientele with the largest spend	1/18/2019 10:34 AM
3	It brought in majority of our top players and they enjoyed a night of good food, a gift and some gambling.	1/18/2019 10:24 AM
4	Largest headcount and play at one time	1/18/2019 10:24 AM
5	Increase in revenue on weekdays	1/18/2019 10:02 AM
6	using data to determine mail recipients	1/18/2019 9:25 AM
7	many players through the doors	1/18/2019 9:21 AM
8	other reason to to Casino beside gaming.People always will make a trip for good promotion offers and good Entertainment concerts, private events, sporting event etc..	1/18/2019 8:37 AM
9	Raining Cash Promotion - brought in Ashland and Medford guests.	1/18/2019 8:35 AM
10	Our guests like the drawing promotions	1/17/2019 8:22 PM
11	Low prize cost with good perceived value Increase time on device and Good Player ADT Players leave with something in their hand	1/17/2019 6:22 PM
12	Known loyal gamblers feeling appreciated and recognized	1/17/2019 12:26 PM
13	Guests like to win money	1/17/2019 11:23 AM
14	Had the right ingredients, invite the right guests on the right weekend, with other promotions happening around it to help drive a lift in play from that particular group.	1/17/2019 11:23 AM
15	Grand Prize drawing on Christmas Day	1/17/2019 10:32 AM
16	Entries could be earned by all gamblers not just slots, or not just table games or poker... This allowed everyone to participate, including card holders.	1/17/2019 10:00 AM

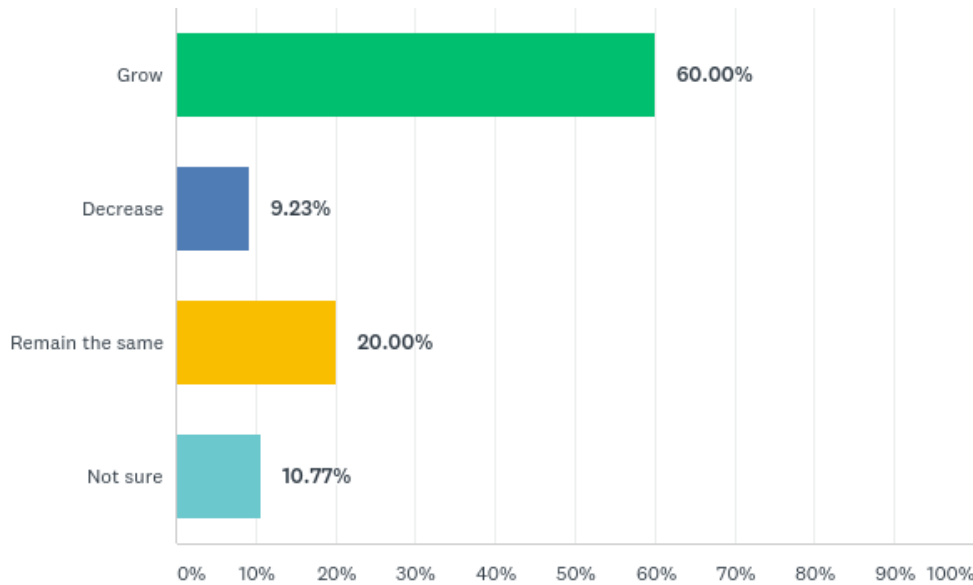
17	Known high frequency and high the players captivated in the casino over a 2 day period with hotel and meal comps as well as a VIP event with dinner & special gift.	1/17/2019 7:29 AM
18	The largest participation with actual casino win and revenue tied to it.	1/17/2019 6:03 AM
19	It builds engaged and loyal high end guests such that they do not split their wallets with other entertainment.	1/17/2019 5:53 AM
20	aspirational and able to make guests "feel" -- also 3 large winners instead of 1	1/17/2019 5:33 AM
21	Great perceived value of gift.	1/16/2019 3:48 PM
22	The event spoke to the correct core group to have success in generating high response rate. A creation of revenue generation / lift within the window of time we designated as a need	1/16/2019 3:31 PM
23	Based upon data, the right gamers were invited.	1/16/2019 2:32 PM
24	Unsure	1/16/2019 1:37 PM
25	Grand prize drawing are a great thing and have great success because the grand prize is popular and usually something that a person doesn't do or get on a normal basis. To add more is that usually with a big drawing they're several other drawing to win.	1/16/2019 1:34 PM
26	We analyzed similar past promotions and found what worked best and utilized that information.	1/16/2019 1:08 PM
27	Drives visitation and extra visits, longer play	1/16/2019 1:04 PM
28	Limited quantities bringing in players who don't usually make more than 1 trip a month therefore seeing an increase in trips and ratings.	1/16/2019 12:59 PM
29	volume of people	1/16/2019 12:54 PM
30	year over year increases in carded gaming to players impacted by changes to loyalty campaigns.	1/16/2019 12:46 PM
31	Absolutely! Guests enjoyed themselves and we had a successful gaming day.	1/16/2019 12:46 PM
32	We gave away a big grand prize drawing Christmas evening. We did internal, external and online advertising for it to get the hype there. We were very successful and people loved it.	1/16/2019 12:16 PM
33	Builds loyalty with the highest tiered guests, gets us their opinions on future promo ideas and what they like for a tailored experience.	1/16/2019 12:11 PM
34	Our marketing efforts are Mass Drawing centered.	1/16/2019 11:57 AM
35	n/a	1/16/2019 9:53 AM
36	The ability to win more than once in a promotion day.	1/15/2019 4:42 PM
37	Because guests had the opportunity to win multiple times in the same day.	1/15/2019 4:31 PM
38	Guests like free gifts that have high perceived value	1/15/2019 1:50 PM
39	people like to feel like they are getting free items	1/15/2019 11:49 AM
40	a couple of reasons, one being the amount of patrons available for the promotion and the other because they all feel they are getting something for free.	1/15/2019 10:47 AM
41	Large ROI and biggest headcount	1/15/2019 9:22 AM
42	Larger prize drawings still draw the most interest, the best attendance, and greatest ROI.	1/15/2019 9:08 AM
43	VIP Events, drive higher spend & extend play	1/15/2019 7:45 AM
44	Increased visits to the casino.	1/15/2019 7:25 AM
45	Invited guests were top players (VIPs), drove revenue for the duration of the party.	1/14/2019 3:05 PM
46	It provided opportunities for new patrons/players.	1/14/2019 1:49 PM
47	See above answer	1/14/2019 1:02 PM
48	During this promotion all the gaming machines were full and 340 patrons playing bingo for our BMW giveaway. We had cash hot seat drawings for the just the gaming machines and earned entries for all other prizes. They love having the chance to play in both rooms while having a chance at the prizes.	1/14/2019 12:56 PM
49	Guests want big drawing wins	1/14/2019 12:48 PM

50	Rewarding our VIP's. Bringing them back to the casino.	1/14/2019 12:45 PM
51	Number of guests that participated.	1/14/2019 12:44 PM
52	Able to source low cost, high value gifts	1/14/2019 12:43 PM
53	This property had not truly utilized the hosting function, and a major push to drive these players to visit vs. waiting for them to come in has made an extreme difference.	1/14/2019 12:41 PM
54	Low cost investment for high return.	1/14/2019 12:38 PM
55	our player base loves free stuff	1/14/2019 12:37 PM
56	Continuity programs bring in our Elite tier level members along with our lower tier level players who meet the qualifying criteria.	1/14/2019 12:34 PM
57	We invited a select group of guests that were some of our highest players. Having a large group of our biggest players here on one day drove up gaming revenue.	1/14/2019 12:34 PM
58	Headcounts, play surrounding drawing dates	1/14/2019 12:33 PM
59	Gives Free Play consistently, Top Tiers are under-invested in.	1/14/2019 12:31 PM
60	Drives incremental play	1/14/2019 12:30 PM
61	.	1/14/2019 12:28 PM

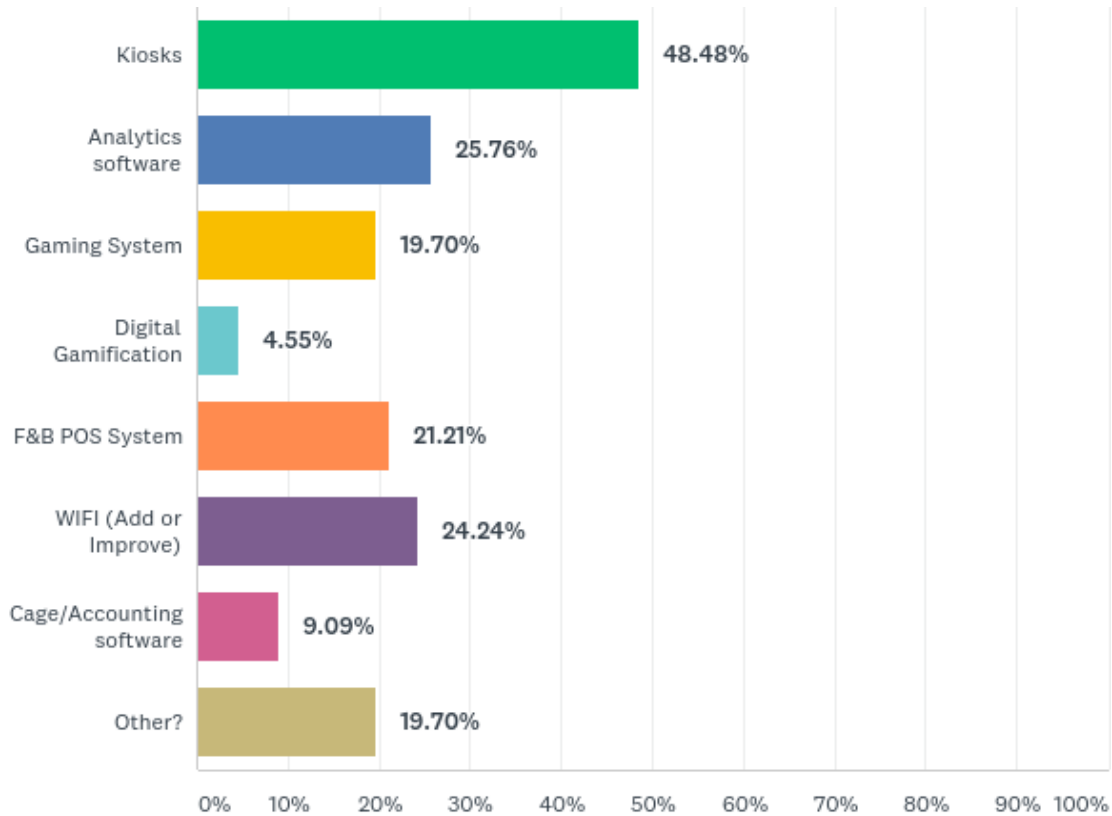
Q5: Choose one initiative that you believe moved the needle for your organization in 2018:



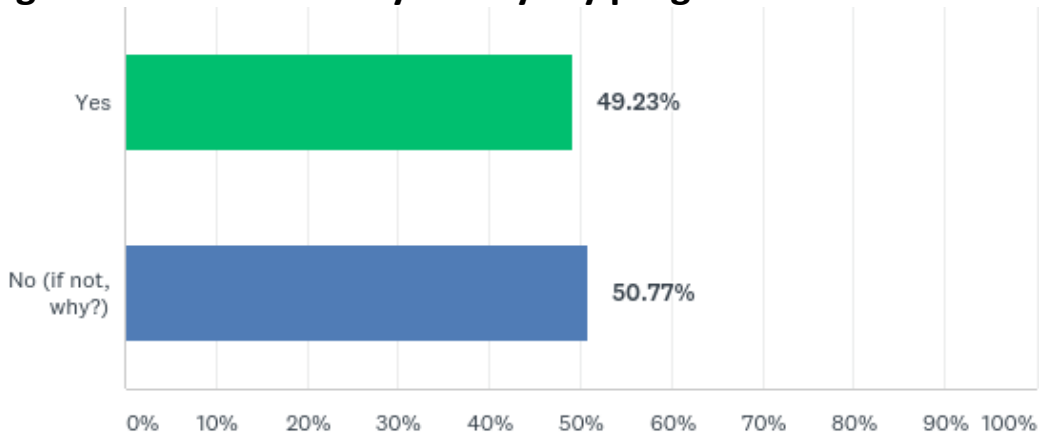
Q6: As a property, did your revenue grow, remain the same or decrease?



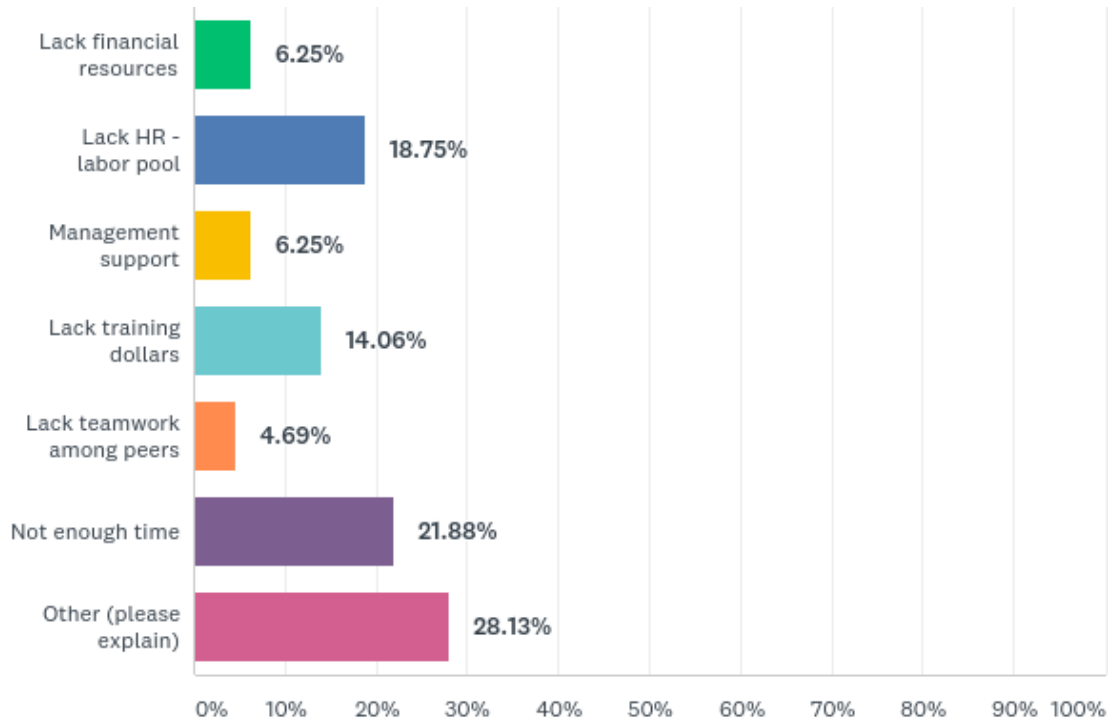
Q7: What are the top technology additions implemented in the past 12 months? Select up to three that you're seeing the best results.



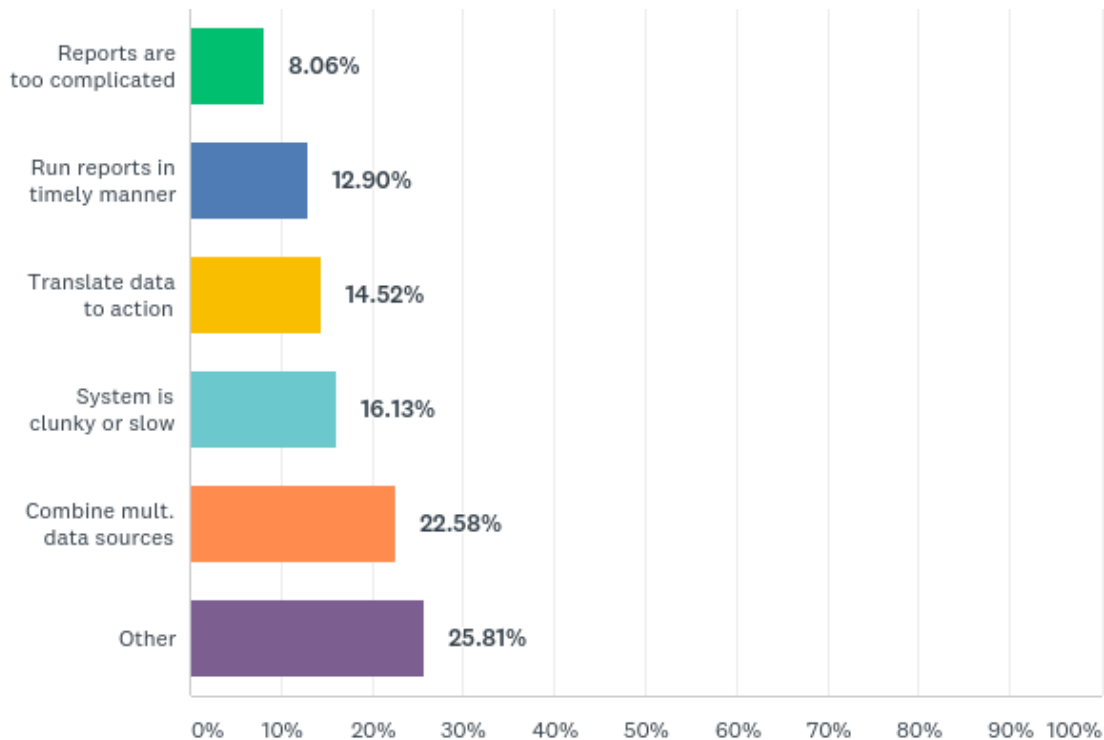
Q8: Is player spend from your hotel, food and beverage and non-gaming amenities tied into your loyalty program?



Q9: What is the biggest struggle you face in your position?



Q10: What is your biggest analytics challenge?



Q11: Give us one example of how you are incorporating digital technology into your operation:

surveys
website and social media.
Social media promotion, Atrient kiosk
Real time player tracking & bet recognition system
Advertising through Digital Technology on property and out of home in market places
Facebook, tv ads, in house displays,
Tableau reporting provided to Marketing team
Changing programs to e-mail programs and using promotional kiosks.
Add IGT system this year
Communication pieces. Email Blasts.
From a marketing perspective we have digital signage throughout the property which we display jackpot winners, current progressive winners, live poker tournament information (from bravo poker live), and other resort information.
Move to heavier spend on digital advertising especially online & in social media.
digital signage
On property marketing signage is all digital.
At this time, mostly in the area of signage. However, as we develop our next phase, hotel/casino, we will implement in many areas of our property.
Currently implementing Playport as a mobile, real money, instant gaming amenity for our customers.
Social Media
Unsure

We have marketing screen on every slot machine that shows up to date promotions.
Project management system. Onboarding digital agency, and ad monitoring service.
Electronic Bingo
digital marketing spend
We rely heavily on kiosks to drive daily promotions
Social Media
moving from posters to digital displays
Google optimization.
Email and SMS texting.
email-mailers, social media, text blasts
Having more digital signs on the casino floor and utilize social media more often with up to the moment events.
we have digital signage.
Marketing offers can be sent using Geo Targeting technology.
we hired a social media person and are working on getting an app
kiosks
Atrient Kiosks, Social Media Promotions
We are currently moving our traditional bounce back program to an all-digital platform.
Electronic draw system, utilizing kiosks
Geo targeting and fencing, updated websites, player portal
Overcoming limited samples of data.
mobile app
using mobile app and social media
Facebook & website
in-house advertising
Using web analytics to monitor/ track all Social Media activities
We are incorporating digital technology into all aspects, but mostly into our direct mail loyalty programs.
None as of yet.
we have a mobile app and a mobile gaming app that we promote
Play Mohawk Gaming App by AGS, lets our guests take casino fun on the go.
This last year (2018) we got our mobile app up and running and open to the public.
We have a mobile app and mobile gaming platforms that we frequently advertise on
Mobile phone app

Think Tank Challenge Premise

According to the pre-conference survey, the biggest issue facing our industry is:

- Finding Qualified Staffing (42%)
- Competition (32%)
- Changing Technology and Lack of Amenities (tied) 25%

We also asked attendees to identify the three areas of most concern in your operation:

- Analytics & Analysis and Strategic Planning both topped the list at 47%
- Concerns around Marketing and Database Management (36%) were second
- Social and Online Gaming came in third at 26%

Additional data from the survey that was used to develop the Think Tank exercise, were the responses to which marketing promotion drove the most ROI in the last 12 months. An overwhelming majority selected Grand Prize Drawing (40%). Furthermore, the pre-conference survey revealed that nearly half of all survey participants had implemented Kiosks at their property in the past 12 months.

For the sake of the exercise, we combined the top categories and secondary data to focus on six critical issues. These issues were:

- Finding qualified staffing with limited resources
- Identify best practices for kiosks
- Identify KPIs that should be used to evaluate marketing programs
- Identify ways properties without amenities can be competitive
- Identify key elements to create a successful grand prize drawing
- Marketing or operational ideas that could drive more revenue or reduce costs for struggling properties

During Raving NEXT, attendees broke out into small groups to address the six issues listed above. Two groups were assigned the same challenge and their responses were combined and collected in the following report.

Think Tank Challenge #1 – Tips for Finding Qualified Staffing with Limited Resources

1. Identify the top factors that impact Tribal casinos finding qualified staff when they have limited resources.

- Location (remote area), travel/road conditions (2)
- Lots of local casino competition for jobs (2)
- Wages for entry level at high expectations. Lots of competition and no shift differential (2)
- Too many procedures/regulations in gaming including licensing (2)
- Long hours, 365 operating days
- Harsher working conditions (smoking, standing, etc.)
- Losing trained staff to the increasing tribal economies and their businesses
- Technology is advancing and finding qualified people who want to work in gaming is becoming harder due to competition
- Politically Influenced – Tribal side
- Population – Limited number of people in the area, often more jobs than people

2. Identify a minimum of five key strategies/tips to address your challenge. *Tip: your tips may be linked to the factors you identified above.*

- Work with your local colleges and hospitality training centers. Connect with their students and work with admin to help develop programs that you need. (2)
- Good Benefits or extra benefits. Paid training opportunities, matching past work experiences or benefits. Be accommodating. Example: We know that people have to work Christmas, so be accommodating on other days or celebrations.
- Utilize database mining on your employees, not just your guests. Find areas where current employees live and target those areas with your career

advertising. Develop strategies for different levels. LinkedIn vs. Facebook ads vs. local job websites

- Referral programs. Use your current employees and refer friends. Give bonuses to the current employee when the new one hits milestones.
- Focus on your company culture. Be the employer of choice. Give your employees opportunities to advance. Lots of success stories of entry level employees working themselves up. Fit the tribal history into the culture. Use where we came from to help your employees connect to the organization. Everyone can share these common goals and vision.
- Shorten the length of time it takes for licensing new employees
- Dual Tags – Allow employees to work in more than one department
- Utilize temp agency to create a group of people who can move within departments
- Hiring Fairs

Think Tank Challenge #2– Identify Best Practices for Kiosks

1. Identify reasons why a Tribal property should consider adding kiosks.

- Add more features and gaming interactions for more promotion; interactive experience games that provide a “feeling of chance,” mystery offers, invite only, inventory tracking (2)
- Promotional awareness – flexibility for all different types of promotions
- Allows for access to all direct mail, email, ad hoc, mobile offers – kiosks are 24/7
- Prevents fraudulent activity, taking away manual redemptions from winners club personnel
- Customizable programs communicating to different levels and segments of your database
- Expedite service
- Manage labor
- Convenience, guest experience
- Cuts mailing costs
- Analysis, reports, response rates, tracking

2. Identify marketing best practices for using a kiosk in a Tribal organization.

- Use the kiosk to offer more options for entries into drawings, redeeming offers and coupons. This helps reduce lines at the club booth.
- Make sure you are not layering offers and increasing investment when implementing a kiosk program.
- Kiosks can also be used to train employees about the property and offer employee-based engagement programs
- Kiosks have all property information on them for easy access and all information is current and accurate
- Savings on payroll expense allows for greater guest interaction
- Create templates of frequent promotion types for consistency of performance.

3. What are the questions or considerations properties should ask when selecting a kiosk company?

- What is your security protocol for protecting sensitive guest data (especially if guest driver's licenses are scanned)?
- What liability do they assume in the event of a data breach?
- What kind of customer support is available for hardware, software, and trouble-shooting?
- Does your product integrate with our systems on property? And what are the charges to connect. Be sure and find out from the existing vendors if there will be a "gateway" connection charge.
- What type of maintain to the kiosk is required? Who performs it? Are there costs for maintenance?
- Is it easy to create content for the kiosk system (i.e. promotions, drawings, offers)? Be sure and get a demonstration of the functionality.
- What is the total cost (not just for the machines but additional needs to get it on property, i.e. server capability, compatibility with club tracking system)?
- What are the on-site training programs?
- What levels of reporting and analysis are available? Get samples of the reports.
- Who else has the system? Be sure and call their references and maybe some who have the system but are not on the list.
- Ask who has taken the system out and why?

Think Tank Challenge #3 – Identify the Monthly Key Performance Indicators that should be Used to Evaluate Marketing Programs

1. Discuss ways a Tribal property with limited resources can get the data needed to make marketing decisions.

- Data needed from all departments, not just marketing.
- Gaming systems are rich in data:
 - Use system reports
 - Autosource – data co.
 - Use letter shop
 - Train within on advanced analytics
 - Partner with local colleges - internships
- Quality meets quantity – Create a usable standard.

2. Identify at least five monthly key performance indicators that should be used to evaluate marketing programs.

- Segmentation metrics
- Lift - post/pro forma
- Rated play
- New business – whether in a mature market or very competitive
- Utilization and/or player count
- ROI is the key indicator – consider if promotions bring the ROI or just draw a certain crowd and take up a lot of assets
- Occupancy (what is derived from free play) and Capture Rate (measure through all amenities)
- Tier growth & play time, spend/activity, change tier up & down
- Year over year growth
- Surveys – see flaws, over time you will notice what needs to change

Think Tank Challenge #4 – Identify Ways Properties without Amenities can be Competitive

1. Identify the top five factors that impact Tribal casinos without amenities.

- Hotel and lack of extended stays due to unavailability of hotel rooms (2)
- Limited marketing opportunities and competitive advantage (2)
- Limited food space/gaming space (2)
- Guest Service program and ambassador (training)
- Engaged team members (motivated, prizes)
- Perception of value to the players “what’s in it for me?”
- Reinvestment rate is high because of the focus on free play, not having other comps

2. List the top five marketing tactics a property without amenities could use to compete in a market with full-service properties.

- Make sure the core gaming product is competitive
- Guest service – individual experience with strong player development department and specialize the experience (think local celebrities, athletes, quality air system, “above and beyond” service) (2)
- Partner with local businesses (i.e. hotels, tickets) and offer catalog purchases with points (2)
- Identify who you are and be good at it – have pride, be consistent, and develop internal company culture integrity
- Immediate reward program based on previous trip using direct and targeted mailers and digital bounce back program
- Create events for varied tiers of guests in an intimate setting
- Customize the customer experience based on timely feedback from surveys, guest service, comment cards, etc.
- Targeted advertising – strategic focus on “fight zones,” billboards, etc.
- Guerilla marketing

Think Tank Challenge #5 – Identify the Key Elements to Create a Successful Grand Prize Drawing

1. Identify the top five most important elements of a successful grand prize drawing.

- Attractive grand prize according to your market – know the audience target, number of winners and demographic (2)
- Qualification periods
 - Timeframes and frequency – target qualifications times so impact can be monitored
- Delivery and presentation
 - Optimal challenge on day of promotion
 - Communicate differently to slots and table games
 - Virtual-physical
- Earning capabilities (tier-based, segmented) for entries – qualify players based on known rules and keep them transparent
- Goal (traffic, handle, etc.)
 - Infrastructure and analytics setup to determine level of success
- Play on specific days (week day, weekend, monthly)
- Targeted advertising (social media, signage, billboards)
- Choose a promotion that beats the competition
- Keep it simple – ease of use, guest friendly

2. Identify the top five elements that should be avoided when creating a successful grand prize drawing.

- Confusion – streamline communication and remember to KISS (keep it simply, silly) – if you don't understand it it's probably too complex for your players (2)

- Give away what you said you were going to give away – avoid committing a vague giveaway time or a bait and switch scenario (2)
- Lack of understanding and knowledge of the market (i.e. jet skis in winter or a boat giveaway in the desert)
- Don't over invest in the guest to the promotion
- Stagnation – change things up and keep it fresh
- Avoid a solid prize, give cash options
- Lack of planning – don't just throw it on the calendar, communicate and buy-in for your prizes
- Don't make the same mistakes repeatedly

3. List five ways these giveaways can be created to avoid layering promotion costs.

- Don't overlap qualification periods
- Avoid allowing players to earn entries on free play or other property activity
- Don't hold drawing or grand finale in conjunction with bounce backs or gift days, etc.
- Proper calendar planning – be strategic, maybe use weekends
- Don't make the promotion too long and risk losing your audience

Think Tank Challenge #6 – Marketing or Operational Ideas for Struggling Properties that could Drive More Revenue or Reduce Costs

1. Identify the top factors that are impacting struggling Tribal casinos.

- Competition (3)
- Distance/location (3)
- Weather (2)
- Limited resources
- Tribal involvement
- Rewards Club – low value perception
- Lack of knowledge – communication
- Budget
- Customer base – need to draw new customers/younger crowd
- Service culture – service sets you apart from the competition, need to train team members thoroughly
- Reinvestment – balancing comps and finding the sweet spot (know what's too much and what's too little)

2. Make three to five recommendations that properties should evaluate on how struggling casinos can cut costs or increase revenues.

- Consider doing a competitive market study to understand your place in the overall market and then use the data to create an action plan. (Player research is key.)
- Evaluate marketing programs to ensure a targeted marketing campaign is utilized
- Hotel availability for coded players – Revisit
- Slot product “big name” high machine hold – expensive slots to lease (2)
- Reinvestment too low or too high

- Evaluate database segmentation
- Promotions that are inexpensive/low cost
- Reduce print media/advertisements – selective placement (evaluate ROI) depends on location and market
- Higher tiered promotions – invited player properties, proper price points, survey players to find out what they want
- Social media promotions (inexpensive) – this can include food promotion (monthly specials), non-restaurants “tag a friend and win a food voucher,” new slot machines, entertainment/concerts
- Draw a younger crowd – offer child care on-site and host events that are geared toward a different crowd
- Re-education – keep promotions fresh in team members’ heads, offer incentives, have cheat card on badge holders, hold weekly/monthly meetings
- Perceived value – find the right price point for events, offer tiered or VIP seating, and keep in mind that free events draw “free people”
- Ask your employees. Engage the team to be part of the solution for improving business.

About Raving: Tribal Gaming Experience & Native American Preference

Raving is a Native-owned company. For over two decades, Raving has partnered with over 137 Tribal Nations and Tribal enterprises and 65 Commercial properties along with First Nations throughout Canada. Our commitment to Indian Country creates the foundation of our Raving philosophy to enrich the lives of those we serve.

As an active Associate member of the National Indian Gaming Association since 2002, we've conducted workshops annually on their behalf. Raving and its partners are also active supporters and requested speakers for many of the regional Indian Gaming tradeshow including National Native American Human Resources Association (NNHARA), Oklahoma Indian Gaming Association (OIGA), Washington Indian Gaming Association (WIGA), CNIGA – Western Indian Gaming Conference and Northeastern Oklahoma Indigo Sky Expo (NOISE).

We believe in the spirit of giving and the importance of creating a positive impact on future generations. Through our partnership with the Notah Begay III Foundation, we are committed to using our relationships in gaming to raise funds and awareness for their critically important work addressing obesity and type 2 diabetes among Native American youth.

For more information about Raving and the gaming and hospitality services and products we offer to the casino industry, please contact us at 775-329-7864 or email amy@ravingconsulting.com. Visit us at today at www.betravingknows.com.

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