



PwC & Oracle Gaming Industry Brief

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Gaming industry: Is your back office holding you back?

Market Trends

The gaming industry is experiencing significant market disruption, and competitive pressures are forcing companies to rethink their strategies. Key trends include:

- Morphing of traditional gaming venues into fully integrated resorts
- Diversification of revenue streams and operations
- Growth through globalization and mergers & acquisition activity
- Increasing pressure to drive operational efficiency and profitability
- Evolving regulatory requirements
- Workforce demand for a better employee experience
- Heightened customer/supplier expectations

Technology Landscape

While the market is quickly evolving, most gaming companies are limited by their back office infrastructure. Antiquated and fragmented legacy applications lack agility and are unable to scale to support new operating models and growth. Operational inefficiencies are exacerbated by the lack of foundational technologies like cloud and automation. And data silos abound, locking away critical insights and limiting performance. Concurrently employee enablement and engagement is not optimized, limiting potential and performance.

Changing the game in gaming...

PwC provides a breadth of consulting services that address the most pressing business issues gaming and hospitality clients are facing today, including:



Mergers & Acquisition

Identifying and executing on deals that accelerate business strategy in the traditional and online gaming industry



Risk & Regulatory

Driving compliance with state & local tax & gaming regulatory requirements



Fit for Growth

Connecting choices on back office cost management (finance, HR, procurement, etc.) and capability development



Workforce of the Future

Addressing issues related to growing, developing and managing talent in a complex, multi-generational, transient environment



Digital

Leveraging innovation, analytics and design to increase productivity and revenue growth in casinos, integrated resorts and online

...with Oracle Cloud

With Oracle Cloud as the enabling technology, PwC and Oracle are helping gaming and hospitality clients transform their Human Resources, Finance, Supply Chain Operations and Customer experiences. Leveraging Oracle's market leading ERP, EPM, HCM, CX and analytics products, we help clients streamline and automate their operations, better manage their workforce and customers, and achieve their broader business objectives. Let our team of Oracle industry experts help you *change the game*.

Why PwC?

- **Industry Expertise** — 500+ dedicated hospitality, gaming & entertainment industry experts with unparalleled process and technology knowledge
- **Oracle Cloud Success** — PwC has helped 400+ clients across industries succeed in their Oracle journey, including:
 - ◆ Led one of the first hospitality deployments with a leading multinational integrated resort
 - ◆ Currently implementing Oracle Cloud ERP at a large global gaming company as well as one of the largest regional operators
- **Oracle Alignment** — Deep collaboration with Oracle product development, helping shape their solutions for the gaming industry
- **Assets & Accelerators** — Gaming & hospitality industry benchmarks, target operating models & pre-configured Oracle systems to accelerate transformation and drive leading practices
- **Qualifications Footprint** — 80% of the largest hospitality & leisure companies work with PwC



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