

A Diagnosis of Inherent Problems in Enhancing Service Quality through Internal Marketing and Organizational Identification in Macau and Singapore Casinos

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Abstract

With spectacular growth in demand since opening the market to foreign competition, executives within the Macau casino industry have focused their attention on enhancing capacity and opening new casino properties. Meanwhile, the Singapore casino market, barely two years old, has already produced revenues comparable to the Las Vegas Strip. Despite stellar past successes, the long-term scenario for the casino industry in both Macau and Singapore could spell trouble. Specifically, service quality stands to suffer because operators have not devoted adequate thought to their service culture and internal marketing strategy. With overall capacity in Asia slated to increase significantly in the next couple of years, the labor shortage for casino companies in Macau and Singapore will get more acute. Current impressive revenues notwithstanding, increased capacity will also put pressure on marketing to attract and retain valued customers. In light of these developments, we review five key challenges to internal marketing practices for casinos in Macau and Singapore: culture, climate, recruitment, compensation, and training.

Introduction

In today's world of global competition and saturated demand, few industries have the luxury of operating in an environment characterized by huge pent-up demand and limited competition. Yet, this is precisely the scenario encountered in the newly opened or recently liberalized casino markets of Macau and Singapore. A munificent business climate of huge unmet demand offers little incentive for top management to engage in employee- or customer-oriented strategic initiatives that would ensure continued success of their casino enterprises. We contend that attention to issues such as corporate culture and internal marketing during times of prosperity offers the best insurance against labor shortages and unexpected abrupt drops in demand. To better comprehend management orientation in the casino markets of Macau and Singapore, we present a framework to explain the lack of focus on creating a customer-centric culture and on fostering organizational identification by employees.

The casino industry in Macau and Singapore has exhibited robust growth over the last five years. Macau is largely responsible for the solid financial results of U.S. gaming companies such as Wynn and Las Vegas Sands. Recent reports suggest that close to 85% of revenues of Las Vegas Sands originate from Macau and Singapore. That Wynn, Las Vegas Sands, and MGM have all sought to list their securities on the Hong Kong market should therefore not come as a surprise to anyone.

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Year on year, the casino gambling revenue in Macau jumped 57.8% in 2010 and another 42% in 2011 to reach \$33.5 billion. Impending future competition and labor shortage, however, may make significant dents in the sector's profitability. For example, Galaxy Macau has recently built a 2,200-room casino integrated resort with around 600 tables and 1,500 slot machines. Parcels 5 and 6 for Venetian have also resumed construction. Wynn Macau has already received approval to build a casino on the Cotai strip. According to an article in the August 26, 2010, issue of *Macau Post Daily*, the Galaxy Macau and a new Sands China property – scheduled open in 2013 – are set to employ over 22,000 workers in total.

These new properties will create substantial additional capacity in gaming products. Tens of thousands of new employees will be needed to run the new facilities. This increased labor demand is set against a backdrop of a steadily decreasing unemployment rate in Macau. The Statistics and Census Service of Macau has said that the unemployment rate for May-July 2012 receded to 2.0%; the underemployment rate was 0.9%. In recognition of the labor shortage threat, many currently operating properties will have to intensify their efforts to retain their workforce. Furthermore, importation of labor for frontline jobs is not easy. The SAR Government in Macau has been very strict about allowing the importation of foreign labor, and has imposed punitive sanctions on companies that violate laws in relation to employment of local versus foreign workers.

Overall, the employment situation does not bode well for the rapidly growing Macau casino industry. The labor shortage may result in significant delays in the opening of future properties, and a poaching of workers from existing properties is to be expected when new properties open. The net impact on the bottom line for both properties currently being designed and constructed and those that are already operating would be huge.

Although a recent entrant into the casino space, the city-state of Singapore has performed beyond expectations of investors and industry observers. The Marina Bay Sands (MBS) integrated resort earned \$807 million in revenues in the last quarter of 2011, while Resorts World Sentosa, owned by Genting Singapore, earned revenues of around \$700 million in the same period. Together, the two casinos in Singapore earned almost as much in revenues as the Las Vegas Strip. With around 20,000 staff between the two resorts, employee retention, training, and engagement is bound to assume center stage as competition intensifies for casino workers in Asia.

This paper takes a prescriptive approach to managing the workforce in Macau and Singapore. We posit that significant enhancement in internal marketing effort is needed if Macau and Singapore casinos are to attract and retain the requisite workforce needed to provide the desired customer service. Later in the paper, key managerial implications emerging from this perspective are discussed.

This article is limited to the oligopolistic casino markets of Macau and Singapore, and does not apply to other established markets (e.g., the U.S. and Australia) or to other emerging markets (e.g., Vietnam and Philippines).

Internal Marketing

The genesis of internal marketing (IM) can be traced back to the early works of Berry, Hensel, and Burke (1976), who viewed internal marketing as a strategy whereby an organization designs its jobs and markets itself to its employees as though the employees were the firm's (internal) customers. Berry and Parasuraman (1991, p. 151)

provide a straightforward definition of internal marketing:

Internal marketing is attracting, developing, motivating, and retaining qualified employees through job-products that satisfy their needs. Internal marketing is the *philosophy* of treating employees as customers.

The premise behind adopting an IM orientation is that in the process of service delivery, a firm's frontline employees actively interact with the customers, and in effect, become the public face of the service establishment. The nature of this interaction plays a huge part in the overall quality of service experience as perceived by the customers. Heskett, Jones, Loveman, Sasser, and Schlesinger (1994) go on to suggest that service quality, customer loyalty, and firm profitability are significantly impacted by the organization's internal service quality, which encompasses IM issues like workplace design, job design, employee development, employee recognition, and providing employees with the proper tools for serving customers.

By striving to create satisfied, engaged, and motivated employees, a firm is able to offer a product that will delight the end customer. The internal marketing literature has subsequently emphasized the crucial element of *communicating by deeds* organizational values and offering employees a clear vision worthy of pursuit (Wieseke, Ahearne, Lam, & van Dick, 2009). The ultimate goal of IM is to create a service culture that instills organizational identification (OI) and customer consciousness among employees (Grönroos, 1990; Rafiq & Ahmed, 1993).

Ueno (2010) reviews the work of several services marketing scholars to assess the elements of IM that are common across these discourses (Grönroos, 1990; Berry & Parasuraman, 1992; Joseph, 1996; Taylor & Cosenza, 1997; Kasper, Van Helsdingen, & De Vries, Jr., 1999). All elements, Ueno reports, can be subsumed under twelve headings: (1) recruitment and selection; (2) training; (3) teamwork; (4) empowerment; (5) performance measurement and reward systems; (6) communication; (7) culture; (8) top management commitment, involvement, and leadership; (9) employee commitment and involvement; (10) internal marketing segmentation and targeting; (11) internal marketing research; and (12) HR issues such as motivation and job satisfaction.

There exists causality and overlap across several IM elements. For example, *top management commitment, involvement, and leadership* will impact employee commitment and involvement. Nonetheless, identification of common elements discussed within the IM literature is useful for researchers as well as practitioners. Researchers are provided with a concise content analysis of IM, while practitioners can appreciate, at a glance, the direction and outcomes of implementing IM. Based on previous research on Macau's casino employees (Gu & Sui, 2009; Kale, 2007; Ruiz, 2006; Wan, 2010; Zeng, Forrest, & McHale, 2012), and on the characteristics of Macau and Singapore markets, we have identified five key elements of IM that could crucially impact the long-term growth and profitability of individual casino companies in these markets: culture, climate, recruitment, compensation, and training. A framework depicting the antecedents and consequences of IM in these two markets is presented in Figure 1.

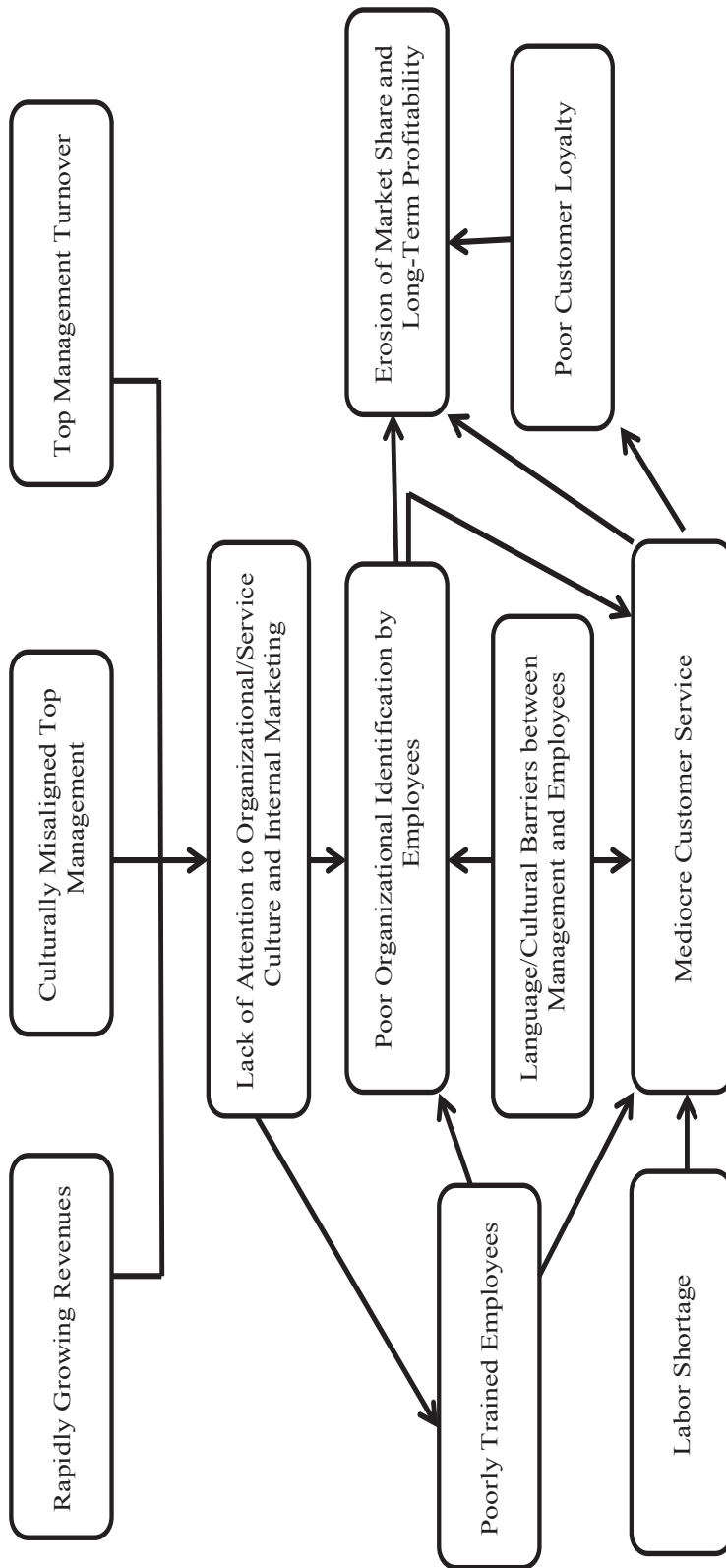


Figure 1. Causes and Consequences of Poor Internal Marketing in Macau and Singapore Casino Enterprises

Applying IM to the Macau Casino Industry

Culture

Fundamental to effective internal and external marketing is the existence of a robust *service culture*. Tony Hsieh, the CEO of Zappos, the legendary online shoe company known for its outstanding customer service, has said,

Your culture is your brand. Customer service shouldn't just be a department; it should be the entire company.

Service culture refers to a specialized culture within the broader concept of organizational culture. Grönroos (1990, p. 224) defines service culture as:

a culture where an appreciation for good service exists, and where giving good service to internal as well as ultimate, external customers is considered a natural way of life and one of the most important norms by everyone.

In Macau, apart from the casinos owned by Stanley Ho's SJM Holdings Ltd., all casino companies began their operations after 2003. As such their organization cultures are still in a state of flux; largely impacted by the person at the helm, its leader, and on the nationality of the parent company. Unfortunately, for many of Macau's casino companies, the tenure of chief executives is relatively short-lived, thus making lasting cultural footprints difficult, if not impossible. Wieseke et al. (2009) have emphasized the indispensable role of leaders in instilling into employees the company's cultural values and vision and continuously communicating by deeds (also see Berry, Hensel, & Burke, 1976; George, 1990). Wieseke et al. (2009) have demonstrated that the tenure of leaders significantly impacts organizational identification among lower level employees. Riketta's (2005) meta-analysis suggests that organizational identification, in turn, is a powerful predictor of several desired employee outcomes, including job satisfaction, cooperative behavior, in-role performance, organizational citizenship behavior, and superior customer service.

To exacerbate the problem of short leadership tenure, two of Macau's casino companies, MELCO-PBL and MGM Macau, have been formed through collaboration between an ethnic Chinese partner and an Australian/U.S. partner. Naturally, both partners will flex their muscles in wanting to run the organization in a manner that seems correct to them. This increases the difficulty in crafting a service culture that would be acceptable to all constituencies within top management, and employees are often provided conflicting signals of what their organization represents, making organizational identification a very challenging task.

Climate

In earlier literature, there has been some confusion between the constructs of culture and climate. In explaining the distinction between culture and climate, Glisson and James (2002, p. 769) write,

By describing climate as the way people perceive their work environment and culture as the way things are done in an organizational unit, climate is defined as a property of the individual and culture is defined as a property of the organization.

Within the service culture/climate context, service culture shapes the policies, procedures, processes, personnel hiring and training, scripts, control procedures and complaint handling techniques that define the service offering's essential elements. In this regard, service culture strongly impacts service climate, i.e., employee perceptions of the practices, procedures, and behaviors that get rewarded, supported, and expected with regard to customer service and customer service quality (Schneider, White, & Paul, 1998). To the extent that employees perceive that they are rewarded for delivering quality service, their organization's service climate will be stronger. Furthermore, perceptions that customer service is important to management will also contribute to a strong customer-centric service climate.

As in the case of service culture, there are serious handicaps in instituting a positive service climate within the Macau and Singapore casino industry. For one, most employees may not have worked in a labor-intensive service industry prior to their current job in the a casino resort. Until 2003, the Macau casino industry operated as a monopoly, catering primarily to VIP clients. As such, a strong positive service climate was not deemed vital to profitability.

Empirical research by Wan (2010) supports the widespread lack of customer service consciousness among casino workers in Macau. In Wan's study, 43.1% of respondents did not feel quality service was important nor that their customers demanded it. One of the interviewees in this study said:

Perhaps casino gaming in Western countries is treated as a form of entertainment, but in Macau it is purely a matter of betting. Most of our customers, especially VIPs come only to win money. They don't care about our services. Some of them even prefer for us not to say anything, but just give them cards and money.

The problem of employees' lack of attention to quality service is further compounded by the culturally diverse composition of the casino workforce in Macau and Singapore. Most dealer-level employees tend to be locals, but as one moves above the supervisor cadre, one sees several nationalities represented: Americans, Australians, Filipinos, Turks, Macanese, and British, to name but a few. Each group interprets expected customer service levels and customer oriented behaviors in light of its prior experiences and national culture. Also, because the Macau and Singapore casino markets are growing so fast, management attention has been focused on property expansion and market share gains, not on issues such as service culture and service climate, which are not perceived to have immediate payoffs. Consequently, there is a less than solid understanding among the casino workforce in both countries about what management expects by way of customer service and how employees will be rewarded for delivering the service that management expects. Wan (2010, p.68) quotes the views of one of the Macau frontline employees she interviewed:

Our managers are from different countries such as Macau, the United States, Australia and Britain and have different management styles. American managers emphasize service quality, Australian managers focus on cost control, and Chinese managers rely on Guanxi [networking and personal relationships].

Given such diverse and often conflicting signals from supervisors, it should come as no surprise that frontline employees feel confused about what behaviors management expects of them. Role conflict is inevitably the result, resulting in job dissatisfaction and erosion of morale on the part of employees.

Recruiting

Recall that IM is about attracting, motivating and retaining qualified employees. A business acquires qualified employees through its recruitment and training practices. Recruiting qualified employees in a tight labor markets like Macau and Singapore is indeed challenging. Not surprisingly, whenever a new property opens in Macau, there is extensive poaching of employees from competing casinos from both within and outside the jurisdiction (Kale, 2007).

One company that got its recruitment phase right during its property inauguration was Wynn Macau. Ruiz (2006) reports that in preparation for the opening of Wynn Macau, the company adopted a culturally sensitive approach to its recruiting. Mass-hiring techniques that are effective in Las Vegas were tweaked to focus on bonding with potential employees. Efforts to develop trust with the labor market were underway long before actual hiring began. Instead of relying on job fairs, a common practice in countries such as the U.S., the company spent a lot of time hosting small gatherings and information sessions, a strategy that served to forge stronger bonds with the applicants.

Wynn also expended considerable effort in developing a powerful brand. In emphasizing branding advantages for recruiting, Ruiz (2006) quotes Peter Zhang of Mercer Human Resource Consulting in Shanghai:

Having a strong employer brand is critical in China...It is not uncommon for companies that lack name recognition to compensate by offering premium salaries.

By investing in brand-building, and by tailoring its recruiting strategy to the local audience, Wynn was able to attract enough qualified employees to the new casino property. In fact, the company received 70,000 applications at the time of opening, representing about 25% of Macau's workforce.

A similar approach to recruiting was adopted by MBS in Singapore. The company adopted the *Be Magnificent* campaign that has resonated well among potential recruits. However, subsequent policies and practices of the company were not as successful. Since the majority of recruits did not have prior casino environment experience, hiring criteria had to be modified to reflect this challenging reality. Also, in a rush to open the property, many employees did not receive the level of training needed for them to effectively carry out the roles associated with their job. The net impact was widespread guest dissatisfaction in the first few months of operations.

Compensation

In their study investigating the drivers of job satisfaction among Macau casino-hotel employees, Gu and Siu (2009) report that overall employee satisfaction was found to be positively correlated with employee loyalty. The authors noted mediocre levels of employee satisfaction on items related to salary and benefits, support (encouragement, help, and guidance from superiors and co-workers), and training. Ironically, the key drivers of overall employee satisfaction were, in order of importance, salary and benefits, training, and support.

With the acute employee shortages looming over the horizon, it would make sense for casino operators to raise dealer earnings from the current MOP 16,000 a month (or around U.S. \$2,000, inclusive of tips). We do not suggest that the wage levels parallel those prevalent in U.S. or Australia, as this would seriously disrupt the wage equilibrium,

and could jeopardize casino profitability given the 40% gaming tax in Macau. We do, however, advocate that individual casino companies should consciously try to be industry leaders in terms of the salaries they pay to frontline employees. Only then will they be able to attract a high-quality workforce and keep that workforce motivated. In addition to better wages, integrated casino resorts in Macau and Singapore may want to consider developing gain-sharing programs whereby employees' future rewards are linked to the financial performance of the entire property or to specified units within the property such as the casino or the hotel.

Dissatisfaction with compensation has emerged as a source of discontent among employees at the two casino properties in Singapore. The March 3, 2011 issue of the *Straits Times* reports that casino dealers at MBS and RWS were disappointed with the one-month and two-month annual bonuses paid to them at the respective properties. The same article reports that at least seven of the MBS dealers planned on quitting once they found another job. MBS and RWS dealers said that they took home an average of \$1,800 a month – slightly lower than Macau's average of \$2,000 – despite the higher cost of living in Singapore. With both MBS and RWS making around 50% of gross revenues in EBITDA, there is enough room to offer better compensation to employees and to invest more in training-related activities.

Training

The impact of employee training on company performance is well-documented (Bassie & McMurrer, 2007; Harel & Tzafir, 1999). There is an increasing awareness in organizations that investment in training could improve organizational performance in terms of increased sales and productivity, enhanced product quality and market share, reduced turnover, employee absence and conflict (Huselid 1995; Martocchio & Baldwin 1997; Salas & Kozlowski, 2010). Gu and Siu's (2009) research indicating a strong positive relationship between overall employee satisfaction and the level of training in the casino context is noteworthy. Also important is the fact that respondents in this study gave their employer a mediocre score on the training dimension. The authors go on to conclude:

Our survey shows that 71.5% of the employees had never participated in any training programs and the majority of casino workers were young people. On the other hand, our regression model implies that younger employees are less likely to be satisfied with the firm but training can help increase employee satisfaction. Therefore, there is indeed a need for Macau casino hotels to step up training to improve work performance and employees' satisfaction (Gu & Siu, 2009, pp. 574-5).

The same sentiment was expressed in Kale's (2007, p.7) advocacy for IM as the antidote for Macau's labor shortage. Kale writes on training:

The labor crunch in Macau means that there may not exist opportunities to hire enough qualified people for a particular job. This would necessitate retooling of the existing workforce for handling new jobs or additional responsibilities. For example, a server in F&B may need to be retrained as a Baccarat dealer. This would not only require training in dealing cards at a Baccarat table but may also require language and communication skills training. Any large casino establishment would have some employees who are not well-suited for their current position but would flourish in other roles. In such instances, an internship program might help. Employees could shadow their co-workers

in other jobs to learn more about the nature and content of internal job opportunities.

Ruiz (2006) also highlights the vital role of training Macau's casino employees, stating,

Training is critical in Macau's service-oriented market. Unlike Las Vegas, where the bulk of income stems from machines, revenues in Macau depend on high rollers...

Recognizing the link between employee training and a positive customer experience, Wynn Macau has made employee development one of the cornerstones of its workforce management strategy. According to company sources, all employees receive highly individualized training in groups of no more than 20 and are required to pass certification programs before interacting with guests on the property. This suggests that Wynn Macau's training practices are an exception in the Macau casino industry.

Managerial Implications

Research in services marketing suggests that deficiencies in internal marketing (IM) add to costs of doing business and lower employee as well as customer satisfaction. The costs of replacing employees in China can range anywhere from 25% to 50% of their annual salary. Similar figures would apply for Singapore casinos as well. We believe that addressing IM issues related to culture, climate, recruitment, compensation, and training will create a sense of organizational identification (OI) so desperately needed in the casino industry in Macau as well as Singapore. OI, in turn, will significantly improve overall employee satisfaction as well as retention of casino employees in both markets (Wieseke, et al. 2009).

The five issues we identify are systemic in their functioning. This dynamics have been described in Figure 1. As can be seen in this figure, top management turnover, culturally misaligned management make-up, and the rising demand for casino services have all contributed to the lack of a strong service culture in most casino properties. The Chief Executive of Macau has made a pronouncement that other than arrangements already approved by the SAR government, no major expansion of casino services in Macau will be permitted in the foreseeable future. This freezing of capacity, as well as the slowdown in the growth in demand, should encourage top management at Macau's casino properties to pay greater attention to internal as well as external marketing issues.

With regard to Singapore, we get the sense that the casino division in both MBS and RWS has not paid due attention to the appropriateness of its HR practices, particularly those pertaining to internal marketing. Currently over 80% of the integrated resorts' revenues are derived from casino operations. In assessing both employee as well as customer satisfaction, the casino division deserves greater attention compared to others such as hotel, food and beverage, and entertainment. Both MBS and RWS need to address each of the elements depicted in Figure 1, which have a demonstrable impact on organizational identification, employee satisfaction and retention. Despite the obvious benefits of operating in a duopoly, both RWS and MBS, if poorly managed, could see both their customers and employees desert them as the casino novelty in Singapore wears off.

As of now, issues like corporate culture and service culture do not seem to figure into the agenda of casinos' top management in either Macau or Singapore. This neglect may come back casino operators at a not-so-distant future point when competition gets intense and demand for casino services starts to stagnate. Already, Macau saw its slowest

growth in casino revenues in 2012, after a decade of phenomenally rising revenues. Casino companies in both Macau and Singapore need to decide on the type of culture and values they need to put in place in order to survive and grow in a less munificent environment. The specifics of culture and values will depend upon the service climate that management believes will best suit the market conditions over the next couple of decades. In absence of strong culture and inspiring values to relate to, organizational identification will be extremely difficult to accomplish.

Other Asian countries, such as the Philippines and Vietnam, are already making a concerted effort to become major suppliers in the Asian casino market. If attempts at improving the service elements in Macau and Singaporean casinos are not made in earnest, a dysfunctional service culture will inevitably result. Unfortunately, undoing of this negative culture after competition has intensified will be expensive, time-consuming, and even improbable. It therefore behooves top management in Macau and Singaporean casinos to address cultural issues sooner rather than later. One means of employee acculturation is a strong commitment to training.

Gu and Siu (2009) have indicated that over 70% of casino employees in Macau have received no formal training. At a time when many casino operators in Macau are reporting record revenues and profits, funds allocated to training should be substantially increased. Training of employees enhances employee satisfaction as well as loyalty to the employer, and it has a demonstrated impact on market share and profit.

Casino employees in Macau as well as Singapore need to be trained with three objectives: (1) adjusting attitudes so all employees understand and accept the organization's customer-centric culture and service-oriented values; (2) realizing the role each person plays in creating the desired customer experience so as to increase organizational identification; and (3) improving the job related skills of employees so that the customer experience is enhanced. As discussed, previous research suggests that a sizeable proportion of Macau's frontline casino employees do not believe that service matters. A significant shift in attitude should therefore be the primary goal of training. When each employee realizes the role s/he performs in delivering the customer experience, they will begin to identify better with the casino's service strategy. This sense of identity will enhance motivation and engender loyalty on the part of employees.

Training to enhance job-related skills in both Macau as well as Singapore casinos should include training in cross-cultural communication as well as language skills, especially Mandarin and English. Many frontline employees believe that not knowing how to communicate in English hampers their chances of promotion. Providing training in basic English language will put this anxiety to rest, and level the playing field for career advancement.

In formulating this article, we are cognizant of the fact that casino operators in Macau as well as Singapore are under a lot of external pressure to expand their capacity and increase their market share. Consequently, their attention to issues such as culture, climate, and internal marketing may be less than adequate. With increasing competition and continuing labor shortages, however, these issues demand greater attention right now. Investment in internal marketing, we contend, should assume greater priority than investment in external marketing.

Summary

The demand for casino services in Asia has been on an upward spiral. With 33 casinos currently in operation in Macau, and more to open in the next couple of years,

the competition for employees as well as customers will intensify. The two casinos in Singapore will also face shortages of qualified employees and competition from casinos in Philippines and Vietnam.

The new normal for the nascent casino industry in Asia for the coming decade will be characterized by competition based on service, and not by the heretofore *build it and they will come* premise. The altered business environment for the casino industry in Macau and Singapore will require focused attention on issues related to culture, employee identification, and other key facets of internal marketing. With internal marketing as the spotlight, this article has identified significant issues related to the casino industry's service culture, service climate, recruitment, employee compensation, and training. Forward-thinking operators will be well advised to focus on these issues now so that they are well prepared to face the impending war for talented employees amidst increasing competitive pressures.

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