



WEEK 03

FRIDAY 19 JAN 2018

ICE PREVIEW

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THIS WEEK

- **BACTA plays down impact of FOBTs**
- **SEGA makes foray into mobile slots market**
- **DraftKings announces ambitious growth drive**
- **Global Gaming Awards London Shortlist**
- **ICE Preview Special**
- **Guest Columnists: Anthony Ure, Head of e-Gaming, Isle of Man Department for Enterprise & Simon Trim, CEO, Sporting Group**

NEW JERSEY STANDS UP FOR ONLINE BETTING

Move comes amid pressure to reinstitute ban



Eight members of congress from New Jersey have written a letter to the US Department of Justice (DOJ) voicing their opposition to any plans by the Trump administration to clamp down on states allowing regulated online betting.

At present, proponents of a ban on regulated online betting are calling for the introduction of legislation called Restoration of America's Wire Act (RAWA), that would restore the ban in online betting, which has been effectively rendered null and void by a DOJ decision made in 2011.

In a letter to Attorney General Rod Rosenstein, eight members of the New Jersey congress and two senators call on the DOJ to maintain its earlier 2011 position.

Casting doubt on opposition claims that online betting would be harmful, representatives from New Jersey state: "When the Department issued its opinion, critics predicted an avalanche of state legislation 'would turn every smartphone, tablet and personal computer in our country into a casino available 24 hours a day, seven days a week'. These doomsday scenarios have not come to pass."

New Jersey goes on to credit the part that online gambling has played in the recent resurgence of Atlantic City, saying: "This growth in revenue is in large part due ▶



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THIS WEEK IN NUMBERS

24%



The year-on-year percentage increase in GVC Holdings' net gaming revenues for the fourth quarter of 2017



29/12/17

The date NOVOMATIC withdrew its services from the German market after calls for greater clarity from the authorities regarding online gaming legality

\$990m



The amount Aristocrat Leisure Limited paid for its purchase of American gaming company, Big Fish Games Inc., from Churchill Downs Inc.

to significant capital investment by the state in online gaming facilities, equipment and technology that makes online gambling safe and secure."

The latest figures from the New Jersey Division of Gaming Enforcement support that assessment, with regulators confirming gross revenue for 2017 as \$245.6m, rising by almost 25% year-on-year from the \$196.7m reported during 2016.

In conclusion, New Jersey's letter addresses any proposed clampdown saying: "Placing a blanket prohibition for online gambling would be an antiquated approach to a 21st century issue, punishing states like New Jersey which have invested in creating a safe and secure online gaming structure, while also permitting black market operators to put millions of Americans at risk."

KEY POINTS

- Eight officials pen letter to Attorney General defending online betting
- Online activity credited with reviving Atlantic City
- 2017 online revenue in New Jersey tops \$245m

BACTA: FOBT CLAMPDOWN IMPACT 'EXAGGERATED'

Industry body claims curbs could ultimately be beneficial to economy

The body representing the UK amusement industry, BACTA, has suggested that the impact of the proposed cuts to stakes on Fixed Odds Betting Terminals (FOBTs) has been 'exaggerated'.

Citing its own commissioned research, conducted by the Centre for Economics and Business Research (CEBR), BACTA believes that industry losses from a reduction in maximum stakes to £2 could be up to 47% lower than those suggested by the Government's initial assessment.

The report later goes on to state that the reduction in gross gambling yield to high street betting shops is estimated to be £335m, rather than the Government's estimated reduction of £639m.

Further research conducted by CEBR suggests that this £335m figure could be offset by the coincident reduction in expenditure needed to deal with problem gambling directly arising from FOBTs in the UK, currently estimated at £210m.

Organisations, from the Church of England to 93 local authorities across

STEP UP INTO ASIA



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The number of online gaming licences being auctioned by Italian legislators through an ongoing bidding process



The total amount of revenue New Jersey took in 2017 through online gaming, up four times the amount posted a year prior



The amount casinos in Greece may be able to lend out to select customers if they need to, according to a bill tabled in parliament earlier this week

the UK and the Royal Society for Public Health, have called for the Government to order a reduction on FOBT stakes to £2.

BACTA's research goes on to suggest that there would in fact be an overall benefit to the economy should FOBT stakes be reduced to £2, stating a net increase of £45m to gross value added.

Announcing the research findings, John White, CEO of BACTA, said: "This research puts into clear perspective the true impact of a £2 stake on FOBTs on our economy and should provide comfort to bookmakers that doing the right thing and reducing the maximum stake on FOBTs to £2 will still leave them with plenty of profit to invest in their businesses.

"While there will be some cost to bookmakers from lower FOBT stakes, it is a necessary one to protect consumers from the everyday risk of gambling harm on the high street.

"The £100 stake on FOBTs is a dangerous anomaly in gambling regulation that the Government has rightly chosen to address. We urge a reduction to a £2 stake. That brings these machines in to line with the rest of the market, and puts the needs of player protection first." However,

the Association of British Bookmakers (ABB) countered this assertion, stating: "This is a flawed report, funded by those with vested commercial interests, with no access to betting shop industry data.

"The Treasury's own analysis, with detailed betting shop data, has estimated that the net negative cost to the UK economy of a £2 stake would be a staggering £8.5bn at worst over the next ten years, and £5.5bn at best."

SEGA DEBUTS FIRST MOBILE CASINO GAMES

Computer games developer showcases range of slots games

Global gaming iconoclast SEGA has announced the launch of a progressive slots-based casino mobile application based on its portfolio of console games.

SEGA Slots features classic SEGA games, including Sonic the Hedgehog, Super Monkey Ball, Golden Axe, Shinobi, and Samba De Amigo, re-imagined in Vegas-style casino games. Developed in conjunction with Fox Cub Games, the SEGA Slots application is available on Google Play and iTunes.



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11%



The year-on-year rise in profit William Hill has forecast for the last 12 months, ending 31 December 2017

£65



The amount LeoVegas acquired Intellectual Property & Software Limited for in a new acquisition deal

\$39m

The total amount of revenue Foxwoods Resort took for the month of December, 2017



It's a case of history repeating itself for the company, which began operations in Japan during the 1950s as a producer of standalone slot machines before entering the arcade and console industry in the early 1980s.

Since the demise of its last console system, the SEGA Dreamcast in the early 2000s, the company transitioned from becoming a console manufacturer to a third-party gaming software provider, and in 2004 was purchased by pachinko megacorp Sammy.

DRAFTKINGS BEGINS MASSIVE GROWTH DRIVE

Operator aiming to become number one in US

US daily fantasy sports company DraftKings has ramped up the pressure on its competitors by announcing an "aggressive hiring campaign" that will see the company increase in size by 75% over the next 18 months.

In a statement, Jason Robins, Co-founder and CEO of DraftKings, said: "We are entering an exciting phase of accelerated growth at DraftKings as we continue to develop new products and

diversify our offerings. To meet these needs and remain at the forefront of innovation, DraftKings is focused on hiring top talent."

As part of the drive, DraftKings aims to grow its workforce from its current 425 employees to more than 700 by the middle of 2019. At the same time, the company has unveiled plans for a new headquarters in Boston, which will be double the size of DraftKings' current office.

The company has confirmed that at least 600 of its employees will be based in Boston following its relocation.

DraftKings' new 105,000sqft office will be located at 500 Boylston Street in the Back Bay suburb of Boston. It also plans to expand its in-house media production studio aiming to create unique employee "neighbourhoods" designed to foster cross-department collaboration.

Addressing the new office development, Robins added: "We are also honing in on our commitment to Boston by opening a new headquarters in the city. We're especially thankful to Governor Baker, Mayor Walsh and the state's legislative leadership for their continued support of our company and Boston's thriving tech economy."

DraftKings relocation is scheduled to be completed in the first half of 2019.

NORTHEAST REVENUE UPDATE

Connecticut, Massachusetts and Pennsylvania were a mixed bag in December, which had one extra Sunday compared to last year.

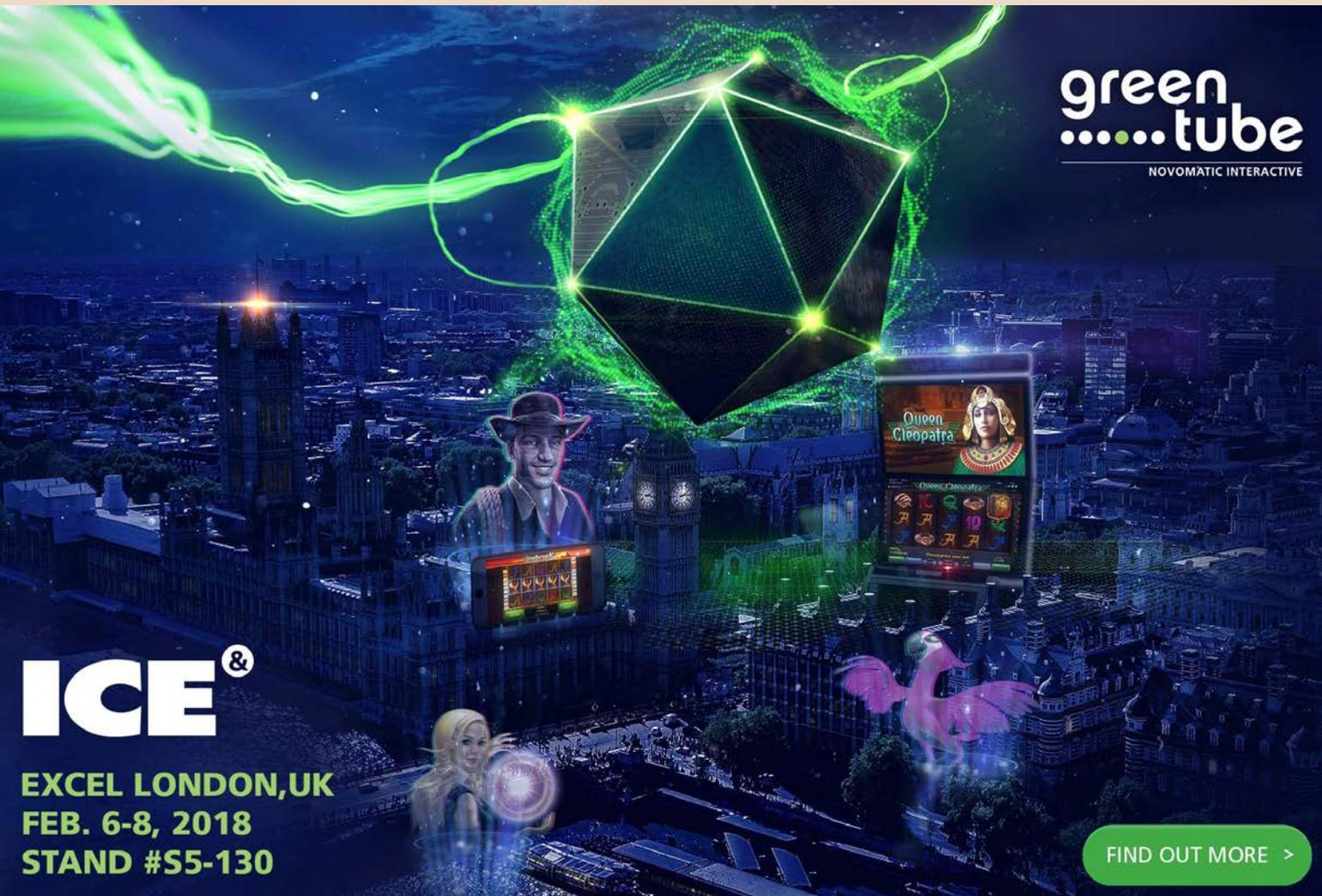
Mohegan Sun in Connecticut generated \$50.307m in slot revenue, down 0.12%, while Penn National's Plainridge Park in Massachusetts grew slot revenue 0.66% to \$12.722m.

In Pennsylvania, slots and tables rose for the third time this year and for the second consecutive month. Table revenues rose for the tenth consecutive month while slots closed out the year with two straight positive months.

BELOW IS A LIST OF US GAMING STOCKS THAT HIT 52-WEEK HIGHS THIS WEEK:

COMPANY	52-WEEK HIGH AS OF WEDNESDAY
Caesars	\$13.40
Boyd	\$37.21
Wynn	\$173.59
Penn National	\$32.75
MGM	\$36.54
Scientific Games	\$54.80
Las Vegas Sands	\$73.51
Pinnacle	\$33.18
VICI Properties	\$21.50

PENNSYLVANIA	REVENUE (M)	YEAR-OVER-YEAR % CHANGE	PITTSBURGH
Valley Forge Casino Resort	\$10.299	+11.00	
Parx (Greenwood)	\$48.160	+5.66	
SugarHouse (Rush Street)	\$25.064	+3.14	
Harrah's (CZR)	\$21.164	-1.92	
Philadelphia total	\$104.688	+3.92	PITTSBURGH
Rivers (Rush Street)	\$29.212	+4.49	
The Meadows (PNK)	\$19.491	-3.40	
Pittsburgh total	\$48.703	+1.19	NORTHEAST PA
Sands Bethlehem (LVS)	\$45.779	+4.31	
Mt. Airy	\$14.002	+3.69	
Mohegan Sun	\$19.498	-3.40	
Northeast PA total	\$79.280	+2.19	ELSEWHERE
Lady Luck Nemaconlin (ERI)	\$2.604	+13.38	
Presque Isle (ERI)	\$8.476	-0.24	
Hollywood (PENN)	\$19.708	-1.40	
State total	\$263.458	+2.42	



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GLOBAL GAMING AWARDS LONDON 2018

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GLOBAL GAMING AWARDS LONDON 2018 SHORTLIST ANNOUNCED

Following months of fevered speculation and anxious waiting, the Shortlist for the inaugural Global Gaming Awards London has been announced, recognising many of the industry's key players.

Completion of the Global Gaming Awards London Final Shortlist has been a lengthy and complex process, in which potential nominees have been deliberated over by our Nomination Panel of highly qualified and experienced experts drawn from a broad range of gaming industry backgrounds.

With the Shortlist complete, the Judges will cast their votes on 16 separate categories, each with ten shortlisted nominees. The only

exception to this is in the Chief Executive of the Year category, where judges will have to pick from 25 of the industry's most successful CEOs. It will be these votes and these votes alone which determine the winners of each award.

The GGA's long-term partner KPMG Gibraltar will adjudicate the voting process, ensuring that the winners are the companies and individuals that receive the most commendation from their peers.

After the votes have been cast and counted, attention turns to the London presentation ceremony at the prestigious Matcham Theatre in the Hippodrome Casino, on Monday 5 February.

Prior to the ceremony, attendees of the invite-only event will be treated to a champagne reception in the casino's Heliot Lounge, named after famed female lion tamer extraordinaire Claire Heliot. The opulent room combines the cosmopolitan atmosphere of a central London locale with the intimacy of secluded speakeasy, and attendees will be greeted with a glass of bubbly where they can mingle with the event's exclusive guests. They will then move on to the Matcham Theatre for the main event, where they will see the 16 GGA winners crowned, whilst enjoying afternoon tea.

For more information on this year's event, please visit the Global Gaming Awards website: www.globalgamingawards.com.

SHORTLIST

BETTING SHOP OPERATOR

- Betfred
- Boylesports
- Codere Group
- Fortuna Entertainment Group
- Ladbrokes Coral Group
- Marathonbet
- OPAP
- Paddy Power Betfair
- SNAI Rete Italia
- William Hill

ONLINE SPORTS BETTING OPERATOR

- 888 Sport
- bet365
- Betsson AB
- Betway
- bwin
- Interwetten
- Ladbrokes Coral Group
- Paddy Power Betfair
- Sky Betting and Gaming
- Unibet UK

RETAIL SUPPLIER

- BetConstruct
- Betradar
- Golden Race
- Inspired Gaming
- Intralot
- Playtech BGT Sports
- Racing Post B2B
- SBTech
- SG Gaming
- SIS

ONLINE SPORTS BETTING SUPPLIER

- BetConstruct
- Betradar
- Golden Race
- Inspired Gaming
- Intralot
- Playtech BGT Sports
- Racing Post
- SBTech
- SG Gaming
- SIS

CASINO

- Aspers Stratford
- Casino Baden-Baden
- Casino Campione
- Casino de Barcelona
- Casino Estoril, Portugal
- Casino de Monte Carlo
- Holland Casino Amsterdam
- Olympic Casino Carlton, Bratislava
- Resorts World Birmingham
- The Hippodrome Casino

ONLINE CASINO

- 32Red
- 888 Casino
- BGO
- Casino.com
- Casumo
- LeoVegas
- Mr Green
- Online Casino Deutschland
- Sky Vegas
- Videoslots

CASINO SUPPLIER

- Abbiati Casino Equipment
- Alfastreet
- Casino Technology
- EGT
- IGT
- Merkur Gaming
- NOVOMATIC
- R. Franco
- Scientific Games
- SuzoHapp

ONLINE CASINO SUPPLIER

- Aspire Global
- Betsoft
- Blueprint Gaming
- IGT
- Microgaming
- NetEnt
- NYX Gaming Group
- Playtech
- SG Interactive
- Yggdrasil Gaming

CASINO PRODUCT

- Authentic Gaming: Casino Floor Live Studio
- Ganapati: Pikotaro's Pineapple Pen
- Habanero: Koi Gate
- Hero Gaming: Casino Heroes 3
- Lightning Box Games: Stellar Jackpots with Dolphin Gold
- Play'n GO: Moon Princess
- Pragmatic Play: Panda's Fortune
- Quickspin: Goldilocks and the Wild Bears
- Realistic Games: Win Sprint
- Red Tiger Gaming: Lucky Valentine

PAYMENT SOLUTION

- CashFlows
- Easy Payment Gateway
- ECommPay
- ecoPayz
- eMerchantPay
- HiPay
- NRT Sightline
- Paysafe
- Trustly
- Vantiv

CORPORATE SERVICES PROVIDER

- Alderney eGaming
- Beehive
- Betting Connections
- BettingJobs
- Isle of Man Gambling Supervision Commission
- Harris Hagan
- Lexis Nexis Risk
- Malta Gaming Authority
- SMP
- Square in the Air

ONLINE BINGO OPERATOR

- Coral Bingo
- Foxy Bingo
- Gala Bingo
- Heart Bingo
- Jackpotjoy
- Maria Casino
- Mecca Bingo
- Sun Bingo
- Tombola
- Wink Bingo

AFFILIATE PROGRAM

- 10Bet Affiliates
- ActiveWins
- bet365 Affiliates
- Energy.Partners
- GoWild
- Intertops Affiliates
- Kindred Affiliates
- Ladbrokes Partners
- LeoVegas Affiliates
- VBet Affiliates

CORPORATE RESPONSIBILITY PROGRAM

- Aspers
- Mr. Green
- Paf
- Ovo
- bet365
- Betsson
- Microgaming
- Sportradar
- Tombola
- Genting UK

CHIEF EXECUTIVE

- Alexander Stevendahl – Videoslots
- Antonios Kerastaris – Intralot
- Bernard Marantelli – Colossus Bets
- Denise Coates – bet365
- Fred Done – Betfred
- Fredrik Elmqvist – Yggdrasil Gaming
- Gustaf Hagman - LeoVegas
- Harald Neumann – NOVOMATIC
- Henrik Tjärnström – Kindred Group plc
- Henry Birch – Rank Group Plc
- Jesper Kärrbrink – Mr Green
- Kenny Alexander – GVC
- Kostandina Zafirovska – BtoBet
- Kristian Nylén – Kambi Group
- Matt Davey – NYX Gaming Group
- Mor Weizer – Playtech
- Paris Smith – Pinnacle
- Paul Gauselmann – Gauselmann Group
- Rafi Ashkenazi – The Stars Group
- Richard Flint – Sky Betting and Gaming
- Roger Raatgever – Microgaming
- Simon Thomas – The Hippodrome Casino
- Tristan Sjöberg – TCSJOHNHUXLEY
- Vladimir Dokov – EGT
- Walter Bugno – IGT

ICE TOTALLY GAMING PREVIEW

6-8 FEBRUARY 2018, EXCEL LONDON, UK
<http://www.icetotallygaming.com/>

The gaming industry's premier event, ICE Totally Gaming, returns to ExCeL London following a record-breaking 2017 show.

Building on this success, this year's event showcases over 8,500 operators and attendees from over 150 countries, including a who's who of some of the industry's biggest names.

This year's show will feature ICE VOX sessions for the first time, a programme of high-level learning and networking modules designed to increase awareness around the most pressing issues facing the gaming industry. Topics covered during the inaugural event include blockchain, cybercrime & security, data science & personalisation, eSports, and modernising lotteries. ICE VOX events will be spread out between ExCeL and The Hippodrome Casino, London.

ICE VOX also encompasses two conferences: The International Casino Conference and the WrB Regulatory

Briefing. Both provide a valuable forum for industry stakeholders to air their views and network in a friendly, relaxed environment.

Running concurrently, the International Legislators Agenda and IMGL Masterclass offer an in-depth look into some of the most critical legal questions and challenges in the gambling sector.

New for the 2018 ICE event will be an expanded Payments Zone, and making its debut at the event will be a new Consumer Protection Zone. This will feature a number of gaming industry companies who have strongly promoted social responsibility platforms, while the expanded Payments Zone will provide a useful area for gaming companies to meet a vast number of providers in the payment sector.

Returning this year is Pitch ICE, which offers gaming start-ups the opportunity to debut their companies at the show and present them to the wider gaming industry. Shortlisted start-ups, which have been selected in a rigorous submission

process, get ten minutes to pitch their enterprises and reach potential investors and partners attending the event, providing them with a unique way of championing their business.

Additional events taking place include: Tribal Gaming Exchange, Research Exchange and the Totally Gaming Academy.

Diversity & Inclusion have been hot topics in both the gaming industry and the wider world, and ICE is no exception, with the Diversity & Inclusion in Gaming seminar marking its second year at the event.

Attendees to the ICE event will also automatically be enrolled in the London Casino Club, gaining access to privileged events and ICE-specific offers at a number of the capital's most well-known casinos, including Aspers Stratford, Caesars, Genting Casinos UK, The Hippodrome Casino London and the Park Lane Club London.



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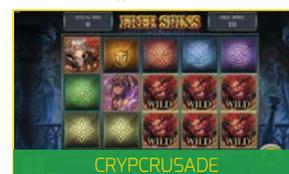
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Q&A WITH KATE CHAMBERS, ICE EVENT DIRECTOR



KATE CHAMBERS
CLARION

what makes ICE 2018 superior to other industry events.

What do you think will be the main topics of discussion at the show amongst delegates this year?

For us, ICE is a fantastic celebration of world gaming, with visitors from 151 nations and exhibitors from over 60. As a consequence of the sheer size and scope of both the visitors and subjects covered, it's impossible to identify a handful of trends or topics. Clearly, the conversations will differ whether you are from Japan, Latin America, the United States, the UK or Africa. The global nature of ICE is our USP and why it's regarded as the cockpit of global gaming.

Can you give us any insight into some of the exciting, inimitable events or presentations happening at the show this year?

Of this year's new features, the biggest are the addition of new sections for Payments and the Consumer Protection Zone, both firsts for ICE London. The Consumer Protection Zone will feature

key organisations that are promoting social responsibility, as well as being a platform for presentations. The ICE Payment Solutions Section, comprising 4,000sqm of space, will provide a focal point for international visitors wanting to meet and engage with the key innovators and thought leaders in the sector. Both features are important additions to the ICE proposition.

ICE is known as the industry event of the year, and has come a long way from its humble beginnings. How do you exceed expectations each year?

In preparing for any forthcoming ICE conference, our strategy is to try and surpass the previous event. We try to never rest on our laurels and I'm totally dogmatic about banishing any sense of complacency. We are only as good as our last show and the culture of always striving to improve, even if it's an incremental improvement, is at the heart of what we do.

In the immediate aftermath of each show, we get together as a team to establish what worked and what didn't, ►

In any industry, some events become synonymous in their respective field, and ICE has become a great advertisement for the success of the gambling industry. This multi award-winning show has grown from humble beginnings 12 years ago to become the must attend event for gambling companies the world over.

Exhibitors from across the globe will showcase their products and services in the 43,500sqm ExCeL exhibition centre, and excitement among industry stakeholders is reaching fever pitch. Many gaming firms plan their whole year around the ICE event, serving as a testament to the reach and appeal of the show.

Kate Chambers, Managing Director of Clarion's gaming division and Event Director, chats to *GI* about the makeup of this year's event, the motivations behind 2018's theme of 'Passport to Paradise' and

discuss our approach and collectively commit to certain things. It's a lot like a footballer setting a minimum number of goals target at the start of the season, the specifics remain within the team. As event organisers, we have a set of values that underpin everything that we do and a manifesto that sets out the promises that we make to our stakeholders on behalf of the ICE brand. It's a big team effort from everyone involved.

What were the reasons behind this year's theme, A Passport to Paradise?

In choosing our themes for ICE, our objective is to bring levels of creativity and quality of thinking more commonly found in consumer marketing to the gaming industry. We have moved from our Shakespeare theme from ICE 2017 to the epic poem by John Milton to capture the imagination of gaming professionals throughout the world.

From a creative perspective, the 2018 event plays with the Paradise spelling and we have created a series of surreal icons to capture the vast nature of the gaming landscape that visitors will experience, courtesy of the 500+

exhibitors who will be presenting their latest innovations and services.

The Paradise creative is spearheading another global campaign which is being deployed through digital, print and social media channels, reaching an audience of close to 80,000 targets in 200 international jurisdictions.

From last year's feedback, what were some of the mistakes you were looking to rework for ICE 2018?

Every year, we undertake independent research amongst both exhibitors and visitors and with over 30,000 people travelling from across the world it was obvious to us that we would receive a broad range of opinions on the event. Some of the people we surveyed had issues with City Airport, others didn't like the Docklands Light Railway.

In any event there will be some things we can influence, others we can't. In wider industry circles, there is a well-known phrase, 'retail is in the detail', and I think that can be applied equally to exhibitions. It's important to iron out these issues, which is why we ask the questions that we do.

You've announced that ICE VOX will offer over 70 hours of learning, with a wide range of exciting industry experts set to offer their insights. Why did you decide to replace ICE Conferences with this unique way of learning?

As an events company, we are always looking to evolve and to meet the needs of our stakeholders. ICE is well respected as a learning event and we know from our research how much importance organisations place on using ICE to help with the development of their team. We also have a free-to-attend seminar programme and the Totally Gaming Academy which offers a series of taster courses for organisations to sample before they purchase. ICE is about delivering a holistic experience, of which learning is an important feature.

What aspects of the show are you most looking forward to personally?

For me, I love the opening of the show when people are arriving and you hear all of the different languages and accents. You know it's game on and everything that you have worked for starts to come alive!

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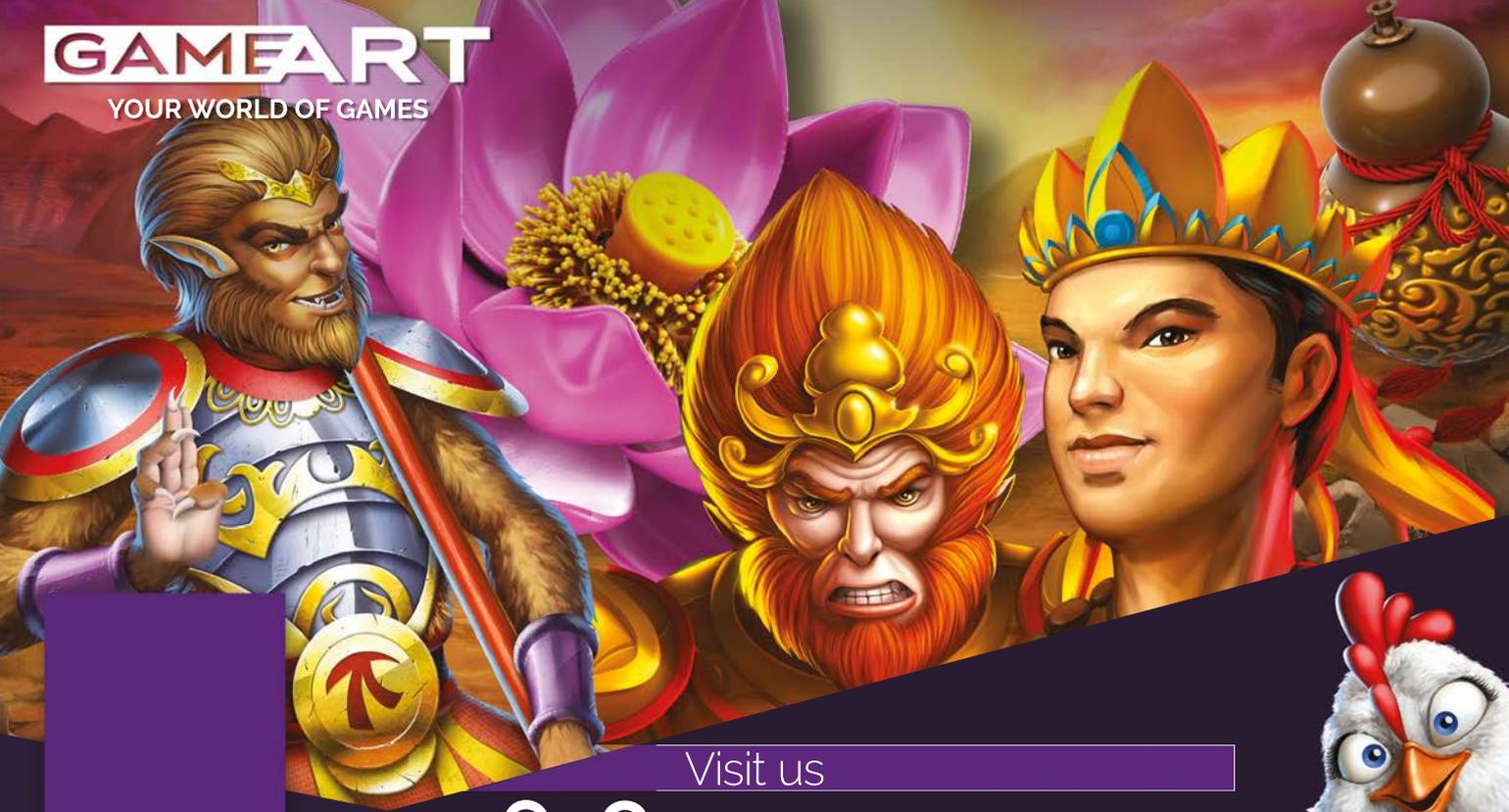
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ICE VOX

GI takes an in-depth look at some of the headline tracks on offer over the new three-day ICE VOX learning experience



MONDAY 5 FEB **WORLD REGULATORY BRIEFING**

Delegates attending this all-day conference will hear speakers close to the increasingly pressing GDPR situation, and will learn about the impact that the latest updates will

have on gaming. Looking ahead, this conference covers the future of technology and how companies can continue to safeguard consumers in a regulated industry through a perpetual influx of new technical developments. The session ends with the informal

'New World Café', where attendees will be able to experience mini-briefings with local regulators, gaming associations and legal representatives from regions such as the Netherlands, Germany, East Africa and Romania to name but a few.

THE INTERNATIONAL **CASINO CONFERENCE**

This full-day conference covers everything from corporate responsibility to reflections on AML4. The day starts with a talk from Ernie Stevens, Chairman of the National Indian Gaming Association, and Senator William Coley, both of whom will be discussing the economic impacts of gaming. Later on in the day, Edward Tracy, CEO of Hard Rock Japan, will also be sharing his insights with an influential panel, discussing a year in the life of a Japanese Integrated Resort. Later in the day, attendees will hear speakers discuss market development, M&As and strategy, and finally learn about how you can take advantage of innovation efforts.

TUESDAY 6 FEB WORLD REGULATORY BRIEFING

Day Two of the World Regulatory Briefing will focus on new developments, markets and opportunities available to attendees. The conference starts with a European Union Keynote, looking at the future of gaming politics and the economy, with the potential effects of Brexit being covered in detail.

A later session looks at some critical issues facing the regulated markets in one of the global gaming's fastest growing regions, Asia. Then attendees will switch focus to the LatAm market, with speakers such as Miguel Ochoa, President of Aieja, Mexico, and Juan Perez, President of Coljuegos, Colombia; this session will be one not to miss.

DATA SCIENCE & PERSONALISATION

This conference is perfect for any attendees looking to learn about how Big Data and Machine Learning are the fundamental drivers behind personalisation. A key session in the

full-day line up looks at leveraging Artificial Intelligence, where Michael Berns, a seasoned fintech and AI veteran, will give insights into the power of AI and Machine Learning when dealing with Big Data. Later on in the day, representatives from Veikkaus Oy will host a fireside chat, where attendees will understand how one of the largest agencies in Finland is using Big Data analytics to create a 360-degree view of customers, to improve digital marketing efforts and to identify those who show signs of gambling addiction.

ESPORTS

For any of those who may have previously doubted this growing sector, this conference will show you the true potential available through eSports. However, many believe the market has become overvalued and it's a bubble waiting to burst at some point in the near future. Mike Stubbs, eSports expert and writer, will give his insights to delegates on how to prepare yourselves if the bubble does

indeed burst. This conference also looks at how you can gain the trust of the eSports community, and which games offer the most opportunity for any of the delegates that are interested in entering the market.

GAME DESIGN & DEVELOPMENT

This full-day session explores the real future of game design and how you can get your game ready for the next big disruption. A highlight session will offer a look at the future of mixed reality game design and how this could potentially change the look and feel of the traditional casino game. Finally, the day ends with the fifth iteration of the 'Game to Watch Competition', where a judging panel will watch five pitches about exciting new game concepts, ask questions and then hand the floor to delegates so they can vote for their favourite.

WEDNESDAY 7 FEB BLOCKCHAIN

As one of the most hotly-discussed topics over the past year, this session gives delegates the opportunity to



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Stand N3-242 6th February 3pm

NETENT
BETTER GAMING™

better understand the mechanics of blockchain, giving attendees a lesson in how to avoid the risks and reap the potential rewards. The first session after lunch looks at harnessing innovative solutions for traditional online operators who are looking to introduce blockchain. The conference also offers attendees a chance to meet several blockchain operators such as Vasily Polynov, Head of Communications at TrueFlip, Thomas Draksas, Co-Founder of Edgeless Casino, and Jez San, Founder of Funfair Technologies.

CYBERCRIME & SECURITY

At a time when cyber attacks are becoming ever more sophisticated, this conference gives attendees the know-how needed to protect yourself and fight the very real threat of network intrusions and data hackers. Ian Attard, Chief Information Security Officer at Betclix Everest Group, David Boda, Group Head of Information Security at Camelot Group and Brendan Dowell, Head of Security at Kindred

Group will host an operator panel, evaluating why security systems are only as good as the people operating them. Finally, the day will finish with a 'Hotseat' where the speaker Prof. Ryan Abbot, Professor of Law and Health Sciences, will debate whether Bitcoin presents an industry opportunity or threat, with a moderator challenging his views. After a quick Q&A with the audience, delegates will be able to vote on who they think argued their case more effectively.

MODERNISING LOTTERIES

The highlight of this conference comes at the very end of the day, with the introduction of 'Champagne Roundtables'.

The session hosts five separate roundtables, offering attendees to have authentic conversations with the speakers in a relaxed, informal and creative atmosphere. The first table looks at why lottery hasn't been revolutionised by technology, with the second evaluating why millennials are less keen to play lottery.

The third table looks to the future, discussing what disruptions may hit the lottery industry in coming years. The fourth evaluates how the retail experience can be modernised and the final table allows attendees to discuss whether or not lotteries are going to be the new casinos.

SPORTS BETTING USA

Last but not most definitely not least, is the conference that will give attendees a step-by-step guide to entering the US's next big potential market of sports betting. The Supreme Court's ruling on PASPA is probably one of the most highly-anticipated events that will occur in the global gaming industry this year, so it's no wonder ICE included this extremely topical conference.

Sessions range from regulatory frameworks, understanding the opportunities and complexities of rolling out sports wagering for tribal casinos, and whether or not the Nevada retail model is expected to be adopted in other states.

ICE INFLUENCERS

Seth Schorr, CEO, Fifth Street Gaming and Chairman, Downtown Grand Casino

For nearly 20 years, Seth Schorr has held various leadership positions in multiple industries including gambling, hospitality and finance. In his current role as CEO of Fifth Street Gaming, Seth has been a pioneer in bringing eSports to the Las Vegas casino market and is well versed in the complex issues related to integrating this new offering into the casino environment.

Melissa Blau, President, iGaming Capital

Mergers and acquisitions have been a dominant theme throughout 2017, so experience in both the operational and financial side of gaming is becoming a valuable commodity. Melissa brings over 15 years' experience as both an operator and advisor to ICE, having co-managed a \$450m media venture capital fund, so she should provide some valuable insights into this new trend.

Tracey Damestani, Chief Executive, National Casino Forum (NCF)

Tracey is responsible for responding to

UK and EU government departments and regulatory bodies on casino gambling-related issues, at a time of significant regulatory upheaval. Tracey also represents the UK casino sector on the Gambling Commission's Advisory Panel for Social Responsibility, and was recently elected to Vice-Chair of the European Casino Association.

Juan Perez, President, Coljuegos, Ministry of Finance, Colombia

As president of the regulator responsible for the newly-regulated Colombian gambling market, Juan has been at the forefront of efforts to introduce a gambling framework which encourages operators but discourages corruption. Working extensively with both the National Police and the Colombian Ministry of Information and Communication Technologies, Juan will provide a useful sounding board into the success of gambling legalisation and regulation in Colombia.

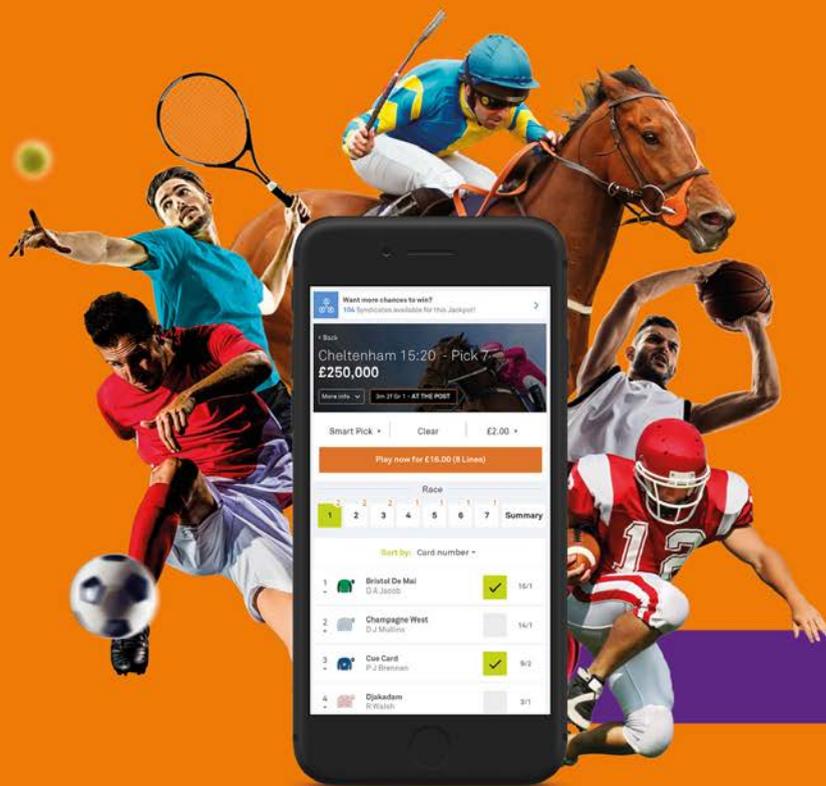
Ian Smith, Commissioner, eSports Integrity Coalition (ESIC)

As Commissioner of the eSports

Integrity Coalition, Ian brings over 20 years' experience as a lawyer in the regulation and governance sectors to this newest of sports. He has previously been involved in anti-match fixing initiatives with the Professional Cricketers Association Federation & International Cricketers Associations (FICA). Now bringing his experience to making eSports secure and free of fraud, Ian will provide an update on the latest legislation and what is being done to encourage responsible gambling in this vertical.

Sarah Sculpher, Chief Marketing Officer EMEA, Caesars Entertainment

Sarah is responsible for Caesars' marketing strategy across all lines of business throughout Europe, the Middle East and Africa. Her remit includes gaming, hotel, restaurants, e-commerce and entertainment and the loyalty rewards programme Player Rewards, and she possesses years of experience in all fields. However, given the turbulent last few years that Caesars has endured, a lot of the focus of her seminar may well be on what the future holds for the wider group.



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ICE REWIND

In 2017, ICE Totally Gaming yet again proved to be an expo to remember, as record numbers of exhibitors and delegates came together to celebrate our ever-evolving industry. GI takes a look back at some of the highlights from last year's event



THE ICE LINE

*ICE launched
as a dedicated
event within ATEI*

1991

*Clarion Events
purchase ATE Ltd
from UK trade
association, BACTA*

2005

*ICE/ATEI renamed
International
Gaming Expo*

2009

*Launch of competitive
EAG show by BACTA.
Clarion appoints
Kate Chambers*

2010

*Kate Chambers
reintroduces ICE
brand identity*

2011

*Last edition of ICE at
Earl's Court venue*

2012

*ICE relocates
to ExCeL
Exhibition Centre*

2013

*ICE wins Marketing
Campaign of the
year in AEO
Excellence Awards*

2015

*Largest ICE on
record (419,792 sq ft of
net floorspace), registers
highest attendance of
28,487 unique visitors*

2016

*ICE once again breaks
records, with over
30,000 attendees*

2017

PLAY

THE BIG EASY

Covent Garden, London



GI verdict: As far as lively, southern-style BBQs/crabshacks in London go, this is the destination for you. By far the most relaxed option we've listed, and one where you can truly let your hair down, it offers a combination of bottomless margaritas, live music and all-you-can-eat racks of ribs. The restaurant is set out over three floors of an old electrical power station, with decor resembling an industrial warehouse, allowing diners to relax without all the pretentious glamour found in other destinations. Something worth noting is that this spot is not the biggest and it's an extremely popular haunt, so it's definitely worth booking a reservation beforehand.



The Big Easy

RONNIE SCOTT'S JAZZ CLUB

Soho, London



GI verdict: After a late night dinner with friends, this basement club is the perfect way to conclude your evening. A popular haunt amongst Londoners, this jazz and blues club is set right in the centre of the city in Soho district, and stays open until late. It is one of the most respected jazz clubs in the world and some of the greatest names in music have performed on the historic stage including Stan Getz, Buddy Rich, Donald Byrd and Ella Fitzgerald. With live music every night till the early hours of the morning, you'll be sure to shake off any of your mid-winter blues.



Ronnie Scott's Jazz Club

ROKA

Charlotte Street, London



GI verdict: This award-winning restaurant serves contemporary Japanese *robatayaki* cuisine in a striking yet informal surrounding in the heart of London's media district, creating the perfect environment for you to kick-back after a hard day's work with colleagues or friends. Although the menu contains some show-stopping dishes, a *GI* recommendation would be the spicy lamb cutlets, a tried and tested favourite that's sure to give your tastebuds a tantalising experience. Whilst on the pricier side of things, it's definitely worth the money and as the saying goes... 'When in... Ro... London...'



ROKA



The Gibson



The Wolseley



Hakkasan

OUT OF THE OFFICE

GI recommends some of London's best venues for wining and dining

WORK

THE GIBSON

Old Street, London



GI verdict: This small cocktail bar in one of London's hippest areas will make you feel like you've stepped back in time to the 1920s. Created by two famous names in the bartender industry, the results do not disappoint. The cocktails are inventive and the menu so beautiful you could spend hours poring over its pages, and in terms of selection, there's something for everyone in this little bar. The venue is small, offering guest an intimate yet subdued experience, with the live jazz piano player being the cherry on the cake.

THE WOLSELEY

Piccadilly, London



GI verdict: Once a car showroom, this café-style restaurant is in an impressive Grade II Listed Building serving breakfast, lunch, afternoon tea and dinner, offering guests quality and style in a unique and stylish environment. Whilst all of our other suggestions are more evening event venues, this spot is one of the number one places to have breakfast in London. If you have an early-morning meeting with a client or a business partner, The Wolseley creates a lovely atmosphere to start the day and discuss business over a delicious breakfast or afternoon brunch. A *GI* recommendation would have to be the full English breakfast with a classic *Einspänner*.

HAKKASAN

Mayfair, London



GI verdict: This opulent Cantonese restaurant in Mayfair, Hakkasan spans two floors and seats up to 220 guests. The lower ground floor encapsulates the traditional intimate Hakkasan setting surrounded by intricate wooden screens, whilst the ground floor features a relaxed dining space, offering guests the choice between two entirely different atmospheres. This Michelin-starred restaurant has built a reputation as one of the top dining spots in London. With incredible dishes such as steamed New Zealand mini lobster, black truffle roast duck, and sliced blue abalone in Hakka sauce, whoever you bring to this dining experience will be blown away.

ICE PRE-SHOW Q&A - ALDERNEY EGAMBLING



SUSAN O'LEARY
CHIEF EXECUTIVE
OFFICER,
ALDERNEY
EGAMBLING

What are you most looking forward to about ICE 2018?

I am really looking forward to meeting with delegates and talking about the exciting things Alderney has in store this year. It is a great opportunity to strengthen our reputation among operators, suppliers, lawmakers and key stakeholders from around the world. This year we will be working even more closely with licensees old and new, and look forward to sharing our plans with those attending the show.

What are some of the main topics you think will be discussed by attendees this year?

Growing regulatory scrutiny will be a key topic. The UK Gambling Commission is

coming down hard on operators and they need to do more to ensure they properly protect players, and have effective AML and fraud prevention procedures in place. Delegates will also be discussing new and emerging markets, as well as trends such as betting on eSports, blockchain and cryptocurrencies, AR, VR and artificial intelligence and, specifically, the roles they will play in the industry.

What can visitors expect to see at the Alderney eGaming stand? Have you got any exciting presentations planned?

Members of team Alderney will be on hand to talk to delegates about the incredible work we have done over the past 12 months, and how we will achieve even more this year. This includes our new B2C product, the Category 1 Licence which allows a foreign operator to be licensed by the AGCC. This is a ground-breaking product and will suit many different types of businesses, both in the regulated and pre-regulated space.

Why is ICE such an important event for Alderney eGaming?

ICE is the biggest industry event on the calendar, and is the only time all of the sector's key movers and shakers are in one place. It not only provides the opportunity for us to talk about what Alderney has to offer, but also to learn more about the industry, and the factors and trends impacting it.

How do you think the show has developed over the years that you have been attending?

I personally have attended ICE for over ten years, first as a gaming lawyer and now with Alderney, and it has evolved considerably, not just in scale (it's at least double the size now), but also in calibre. It is a great show and most people get a lot out of it. It's more business-like than it was when I first started attending and some serious deals are negotiated and signed. Clarion know what they are doing and their experience has evolved with ours.



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ICE PRE-SHOW Q&A - BETRADAR



TOBIAS BRUNNER
DIRECTOR OF
MARKETING
OPERATIONS,
SPORTRADAR

Why do you think it's so important for companies to attend events like ICE?

ICE has always been a huge success for Betradar throughout the years. It's a unique gathering place for all the major gaming players including operators, suppliers, regulators and more, allowing you to build your contacts and generate new business.

What are you most looking forward to about ICE 2018?

ICE remains one of the premier opportunities in the calendar to make new contacts, reconnect with old ones, and greatly improve your relationships with existing partners and clients. After all, even in the digital age, there is no substitute for personal contact. Of course, there are many more things I'm looking forward to.

As an example, we will present all visitors with a brand-new stand design, loaded full of presentation areas, product displays and opportunities to speak to our team, who will be coming in to London from every corner of the globe.

What are some of the main topics you think will be discussed by attendees this year?

The momentum and speculation building around US sports betting with the US Supreme Court case will certainly be on most minds. As a result, Betradar has drawn together all its existing expertise, strong industry relationships and investment in further extending its already renowned depth and breadth of data, to put it in the unique position to provide the most flexible and responsive menu of turnkey services to companies looking to offer sports betting in the US. Historical betting patterns also show that FIFA World Cup traditionally provides a major boost to all bookmakers. It will be the most social, interactive and shareable sporting event the world has ever seen.

What can we expect to see at the Betradar stand at ICE this year?

In 2018, we are looking forward to picking up where we left off. Our presence will give all visitors the opportunity to discover our full range of innovative products and to rediscover why Betradar has been one of the world's leading suppliers and providers of sports betting data services over the last decade. Visitors can experience the advantages and benefits of our Managed Trading Services, an effective risk, liability, and player management service for sports betting operators. Our live streaming unit will be demonstrating how our Live Channels for online and retail bookmakers provide you with a dedicated, 24/7 live streaming product seamlessly fulfilling your customers' demand for live visualisation and betting stimulation. For our virtual sports betting portfolio, we will present our new series of Virtual Sports In-Play products consisting of tennis, cricket and baseball. And that is just the tip of the iceberg!

ICE PRE-SHOW Q&A - GANAPATI PLC



MARK MCKEOWN
SALES AND
BUSINESS
DEVELOPMENT
MANAGER,
GANAPATI PLC

Why is ICE such an important event for Ganapati?

We are a relatively new company with a great product, and ICE provides us with the perfect platform to showcase that to those operators and platforms we are looking to target. It is also the one and only show which the whole world attends and we want to introduce them to our standout content.

What are you most looking forward to about ICE 2018?

ICE is the premier gathering place for the online gaming industry. Everyone attends so it is a great opportunity to meet up with colleagues new and old and see the most recent trends and

innovations in the industry. I remember the ICE/ATE show when it was at Earl's Court 20 years ago. At that time, online was something that people were just starting to think about and it appeared on just a few stands. It's amazing how far the industry has come in two decades!

What are some of the main topics you think will be discussed by attendees this year?

Blockchain, eSports, cryptocurrencies and engaging new content like Ganapati Games are just a few of the many exciting areas. It is a great opportunity to see which operators are keeping their competitive advantage.

There is not a day that goes by without another discussion around a potential

merger and acquisition as the industry is really consolidating. Any bets on who is going to be next?

What does Ganapati have lined up for ICE this year? Do you have any exciting presentations that attendees should look out for?

Ganapati's stands have already gained a great reputation for being fun and playful. All I can say is 2018 is going to be "geisha-tastic". Come to stand N7-440 to see for yourself.

What sort of business will you be looking to do at this year's show?

We have plenty of discussions lined up with operators and platforms who are interested in our unique and authentic Japanese RNG games.

"It is a great opportunity to see which operators are keeping their competitive advantage"

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ICE PRE-SHOW Q&A - DEGREE 53



ANDREW DANIELS
MANAGING DIRECTOR,
DEGREE 53

What are you most looking forward to about ICE 2018?

First of all, this will be our first time exhibiting at ICE and we are very excited about showcasing our capabilities. Our team will be on hand to discuss what we can offer to support with any bespoke development, UX, design or any consultancy services operators may require. ICE always has a great atmosphere and we look forward to learning more about the latest products, trends and what concerns the industry today.

In the years that you've been attending, how has the show evolved and changed to meet the needs of the industry?

From the days when ICE was held at Earl's

Court, it was very land-based operator oriented. Then it switched focus to mobile as it was a growing area and everyone was launching their new mobile products. Now, mobile solutions have matured and operators look for more comprehensive platforms and multi-channel solutions.

What can visitors expect to see at the Degree 53 stand? Will you be launching any new products?

We will be presenting our latest report, looking into UX practices of sports betting operators. It will focus on the betslip in particular. It's important to continuously review existing products, especially if they're key to conversion. Betslip is one of those elements that any punter needs to see clearly and understand what is displayed. Therefore, its UX needs to address these requirements. The betslip report contains our review of the top ten UK sports betting operators, and provides insight into optimising the betslip for increased conversion and ease of use. We will also be able to advise visitors about any technical or design-related

queries they may have. Attendees can come visit us at our stand S3-202.

What are some of the main digital topics you think will be discussed in terms of development by attendees this year?

In light of the recent news and reports from the UK Gambling Commission, compliance and GDPR will be one of the main topics. This includes tackling problem behaviour, financial liability and making users aware of how their data is used. Another area could be eSports due to its growing popularity and user base.

Why is ICE such an important event for Degree 53?

ICE is the main event in Europe for online gambling, and everyone is there. It's the best opportunity to make new contacts and catch up with old ones, as well as existing clients and partners. It's important for us to be at ICE to make more businesses aware of our capabilities in the digital area. It is also a good time to look at competitors and different operators to learn about innovations, new products and trends.

ICE PRE-SHOW Q&A - HELIO GAMING



RICHARD MIFSUD
CEO, HELIO GAMING

What are you most looking forward to about ICE 2018? And why are industry events like ICE so important to Hello Gaming?

We are looking forward to talking about our flagship product Lotto Hero, and also about the powerful game engine that underpins it which can be utilised for several other games.

Events such as ICE give us the opportunity to speak to a high number of operators and other people involved across this industry in one place, avoiding the need to travel all over the world to relay our message and showcase our products to potential customers.

In the years that you've been attending, how has the show evolved and changed to meet the needs of the industry?

I have been attending this show for many years, and I think it just gets bigger every year and is now the most important annual event in any form one could imagine. I would say to an extent that if you are doing business in the online gaming world it is an essential part of the calendar.

What can visitors expect to see at the Hello Gaming stand? Will you be launching any new products or have any exciting presentations on offer?

One can expect to meet a great team of people that love what they

do, and do it in the best way possible. We will be showcasing our flagship product Lotto Hero and also explaining how operators can benefit from using our very powerful game engine.

What are some of the main topics you think will be discussed by attendees this year?

Lottery is something everyone is discussing and this topic will keep going for many months to come. Moreover, cryptocurrencies and the blockchain in general will also be widely discussed, with many innovative products hitting the market.

"I think it just gets bigger every year and is now the most important annual event in any form"

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ICE PRE-SHOW Q&A - CONNECTIVE GAMES



**JULIA
SALAGAEVA**
MARKETING
MANAGER,
CONNECTIVE
GAMES LLC

What are you most looking forward to about ICE 2018? And why are industry events like ICE so important to Connective Games?

We are thrilled to be returning to ICE once again, and to talk to delegates about the incredible progress we have made over the past 12 months with our poker and casino platforms and products. We also look forward to catching up with operators and fellow suppliers to learn more about the trends impacting the global online gambling industry in 2018, and the opportunities these trends present. It is going to be a huge year for Connective Games, with a raft of new products, tools and features in the pipeline, and we can't wait to share them with friends old and new.

In the years that you've been attending, how has the show evolved and changed to meet the needs of the industry?

The number of delegates attending the conference has increased significantly in recent years; this in turn has led to a major uptick in the amount of traffic we have received at our stand. The quality of the show has also improved, from the speakers and talks right through to the layout and organisation of the event. It is the largest conference on the calendar, and the one we get most excited about.

What can visitors expect to see at the Connective Games stand? Will you be launching any new products or have any exciting presentations on offer?

Senior members of the Connective Games team will be on hand to speak with delegates and guide them through

the products and services we offer. They will be able to try out our platforms and games, and get a feel for what makes us one of the most successful technology companies in the sector. We would also like to invite visitors to stop by for a quick chat and a coffee – anyone and everyone is welcome at the Connective Games stand.

What are some of the main topics you think will be discussed by attendees this year?

I think virtual reality will be a hot topic this year. Operators and suppliers are still trying to figure out the exact role it will play in the industry, but here at Connective Games we believe it will be big. I think we need to find a way of rolling out VR to the masses - possibly via mobile - and when widespread adoption occurs it will really ramp up our efforts with the technology.

"It is going to be a huge year for Connective Games, with a raft of new products, tools and features"

ICE PRE-SHOW Q&A - ULTRAPLAY



**LYUBOMIRA
PETROVA**
PR AND
MARKETING
MANAGER,
ULTRAPLAY

gaming brands ready to dominate the eSports betting scene and make further inroads into the online gaming scene.

In the years that you've been attending, how has the show evolved and changed to meet the needs of the industry?

It's grown at an exponential rate, attracting more and more attendees and exhibitors, which makes it one of the highlights of the gambling industry's calendar. Its role for the whole sector is very significant and we are ready to show our latest products and betting solutions to our long-term partners, as well as the new delegates who are invited to UltraPlay's booth S1-110 during ICE this year.

What can visitors expect to see at the UltraPlay stand? Will you be launching any new products or have any exciting presentations on offer?

We will focus on eSports betting where our coverage is unrivaled in the market right now, including 25 competitive titles, over 3000 eSports events monthly

as well as over 1500 in-play events. Our platform's functionalities and betting options are created to meet the wide variety of requirements of both punters and operators.

eSports and blockchain will be united at UltraPlay's booth with the presentation of eGold – the ultimate eSports betting cryptocurrency and the brand-new betting brand Buff88, on which eGold will be first integrated and will provide another level of betting excitement to all crypto and eSports users.

What are some of the main topics you think will be discussed by attendees this year?

Blockchain has become one of the hottest topics of 2017 globally and will continue to gain more interest from many industries. We anticipate our blockchain-based project eGold will attract delegates who want to be involved in the sector and benefit from the technology that will continue to unveil its potential to the gambling industry.

What are you most looking forward to about ICE 2018?

And why are industry events like ICE so important to UltraPlay?

UltraPlay has been offering advanced betting solutions since 2010. Over those eight years, the company has unleashed its potential as an innovator, a trusted partner, and a pioneer in eSports betting as well as bitcoin adoption in the online gaming industry. Now, all of the gaming brands that have put their trust in our products are the real proof of the company's vision and mission to deliver cutting-edge technology solutions and the highest quality products. ICE 2018 will play a key role in our business strategy to continue our growth and successful partnerships with online

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ICE PRE-SHOW Q&A - MICROGAMING



**ANNA
MCCHESNEY**
PR MANAGER,
MICROGAMING

What are you most looking forward to about ICE 2018?

ICE tends to be the platform where companies share their focus for the year ahead and what is up their sleeves from a product and content perspective. I'm looking forward to seeing what companies are announcing for 2018 and how they represent this on their stand.

What are some of the main topics you think will be discussed by attendees this year?

I think it will be varied, and largely dependent on the organisation and what they are selling, but you can guarantee regulation

and product development will always be discussed. Innovation and technology is another topic that I'm sure will be a focus for companies, and we are looking forward to showcasing our latest innovations from our R&D team in our exclusive Immersion Room on the stand.

Last year, your sets for Jurassic World and The Phantom of the Opera were incredible. Are you set to top that this year?

Last year was a real challenge for us as a team, but the hard work and commitment paid off and we had our most successful ICE to date. The three bar changes and stunts, such as The Phantom of the Opera singers, captivated audiences. The feedback was so positive, it was a logical decision to commit to the redressing of the bar again for 2018.

We are also going to be utilising the Boulevard space at N5. The area will be used to launch Triple Edge Studios, an independent game

studio that will be supplying exclusive content to Microgaming. It is the first in a new generation of independent game builders to be announced in the year ahead.

And of course we have our double-deck stand at N5-220 which will house a brand-new product demo experience, our Immersion Room and Games Room, and the beautiful kinetic lights that mesmerised attendees in 2017.

How do you think the show has developed over the years that you have been attending?

This will be my sixth ICE, and when I look back at photos from 2013 you realise how much the show has developed and grown! Stands get bigger and better each year, which makes it harder for exhibitors to stand out from the crowd. That's why as a team we have pushed the boundaries and found new ways to cut through the noise – the bar changes last year is the perfect example of this.

ICE PRE-SHOW Q&A - KAMBI GROUP



MAX MELTZER
CHIEF
COMMERCIAL
OFFICER, KAMBI
GROUP

What are you most looking forward to about ICE 2018?

For me, ICE is all about opportunity. The opportunity to catch up with customers. The opportunity to meet with potential clients. The opportunity to showcase how Kambi helps businesses grow. The opportunity to rub shoulders with so many like-minded innovators and forward-thinkers. It will certainly be an action-packed few days and I'm very much looking forward to it.

What are some of the main topics you think will be discussed by attendees this year?

The World Cup will be a very prominent topic at ICE – it's the biggest sports

betting event of the year so exhibitors will be keen to show how they are preparing for it. For Kambi, our World Cup preparations started long ago, and we'll certainly be sharing how we're approaching the tournament. And thanks to our quick integration times, those who like what they see can be up and running with Kambi in advance of the big kick-off in June.

Elsewhere, people will be eager to talk about what is happening in the US in relation to the Supreme Court hearing. The prospect of a legal sports betting market in the US is a very exciting one, so expect the casino operators that usually travel over to view casino products to take an inquisitive stroll around the sports betting stands.

Can you give us any information on what kind of presentations Kambi has lined-up for the expo?

If you have any interest in launching or upgrading your sportsbook then S2-110 will be the place to be. This year we'll be focusing on how Kambi

empowers operators to take control of the sportsbook front end, so they can mould it to their players – both online and in retail. For instance, we'll show how operators can customise the sportsbook for different player groups, how they can design their own coupons within our SSBTs, and how they can build unique experiences on top of our API-managed front end. The possibilities really are endless. We'll also have touch screen demos, a full retail set-up, as well as other devices where visitors can road test the product for themselves.

"The prospect of a legal sports betting market in the US is a very exciting one"

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ICE PRE-SHOW Q&A - SCIENTIFIC GAMES



MATT DAVEY
GROUP CHIEF
EXECUTIVE,
DIGITAL,
SCIENTIFIC
GAMES

Why will you be exhibiting at this year's ICE show?

ICE is always a fantastic opportunity to display the latest and greatest in gaming technology, and we look forward to bringing new opportunities to our customers. Of course, this year marks a particularly exciting time for Scientific Games with the recent acquisition of NYX Gaming Group. Together, we form a leader in digital gaming and sports betting, and we look forward to unveiling our combined product portfolio under a new brand.

How do you think the show has developed over the years that you have been attending?

ICE has evolved and expanded to

leverage the power of the interactive business. The show has the energy of a worldwide tech hub, with countless new platforms and technologies available in every booth. We're at the point in our industry's history where land-based and online gaming are converging, and that's reflected on the show floor.

Why do you think it's so important for companies to attend events like ICE? And what sort of business are you hoping to do at the show?

ICE is one of the best opportunities in the industry to engage with customers and launch new products. It's the perfect time to check in, make arrangements for the near term, and share what's on the horizon. As with any trade show, we're hoping to get our partners excited about the future, share the benefits of our NYX acquisition, and discuss what it means for them. There's always a positive energy that permeates the show floor, and it makes for productive meetings with key partners and new clients alike.

What are some of the main topics you think will be discussed by attendees this year?

We think the prospect of sports betting legislation in the US as well as the expansion of online gaming and iLottery will be top-of-mind for suppliers and customers. Also, we expect to see innovation on an unprecedented scale. With so many gadgets and entertainment options available to players, game creators are required to think outside the box and find new ways to engage the player.

What can we expect to see at the SG Interactive stand at ICE this year?

Attendees can expect to see a wide variety of new and upcoming content from all of our game studios across the SG and NYX portfolios, highlighting the end-to-end nature of our product library.

We'll also display some of our top-tier technology capabilities, and our new Equinox® cabinet. It's an especially big year for us at ICE, and we're enthusiastic about the breadth of our showing.

GUEST COLUMNIST:



ANTHONY URE

HEAD OF E-GAMING, ISLE
OF MAN DEPARTMENT
FOR ENTERPRISE

THE CONTINUED INTERSECTION OF BLOCKCHAIN AND E-GAMING

The potential offered by the power of blockchain-based gaming is one that will dominate ICE this year. Ure discusses the most important issues facing adoption of this new technology

INTRODUCTION

ICE 2018 is only weeks away! The event is the most significant permanent fixture in the e-Gaming industry's diary, drawing in exhibitors from around the world. As ever, it offers the perfect platform for businesses to showcase their product innovations to an international audience, and for industry experts to meet and discuss the key challenges and opportunities for the sector.

The event also offers a fantastic chance to look in the proverbial "crystal ball" and forecast key trends and themes for the industry. A trend which continues to dominate conversations and discussions is the intersection of blockchain and e-Gaming. The global sector has been applying blockchain in various areas, from information storage to payment processing, and is seeing the benefits.

INFORMATION STORAGE

Whilst traditional gaming platforms own or control servers that store the game technology, player deposits and other sensitive information, in blockchain gaming platforms all the information is stored on the distributed ledger system, in other words, a decentralised network.

Traditional gaming sites have been prone to hacks, attacks, leaks and other issues, because their servers can be exploited. However, blockchain makes the platforms more resilient as there is no central point which can be attacked.

SMART CONTRACTS

A smart contract is a set of instructions to various stakeholders in a transaction. So, what makes them unique? Smart contracts are most often associated with Ethereum, a blockchain-based distributed computing platform. Their terms reside on the blockchain and are very difficult, if not impossible, to hack.

Once they are in place, the outcomes to be expected under their terms are fixed and cannot be tampered with. Once the terms are met then the contract is fulfilled. Hence, they can operate in a secure, verifiable and immutable way.

AUTHENTICATION AND VALIDATION

Another important aspect of blockchain tech is its ability to authenticate and validate transactions. The process

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involves using the blockchain as another factor of security to create and verify the identity of users, facilitating the management of it from their side. This provides the users with further control over their personal information, who has access to it, and how that access is granted.

EXPEDIENT PAYMENT PROCESSING

Payment processing in the online gaming industry has been considered more expensive and slower than other online commerce offerings. However, a blockchain processor makes transactions faster, easier and more efficient.

CHALLENGES

There are a few challenges which need to be overcome for blockchain to realise its full potential. Legacy technological infrastructure is coupled with the lack of technical understanding, as the practicality of implementing it falls outside of the conventional IT skill-set. Also, there are high initial capital costs, and blockchain networks use substantial amounts of computer power. Despite these challenges, we are optimistic that the long-term benefits of the technology will continue to shine through.

ISLE OF MAN'S PROPOSITION

The Isle of Man is a front-runner in embracing and

nurturing innovative technologies. This is aptly illustrated by the fact it was the first jurisdiction to introduce a regulatory framework for digital currencies in 2014, and was also the first government in the world to use a blockchain ledger to register company data on the island.

Furthermore, the online gaming sector on the island continues to thrive, with a robust regulatory framework at the heart of its proposition. For example, Quanta, which operates the first fully compliant blockchain lottery in the world, was recently granted a licence to operate and develop its business licenses to continue harnessing the opportunities arising from the synergy between online gaming and blockchain technology.

CONCLUSION

There is no doubt that blockchain use and development will continue to have a significant impact on the global gaming industry. Blockchain-powered solutions are revolutionising transactions and data.

In fact, some industry pundits have said the technology could be one of the best things for the sector since the invention of the internet. It will be very interesting to see if this prediction comes true and if it does there will be no better stage than the ICE Expo to find out!

GUEST COLUMNIST:



SIMON TRIM
CEO, SPORTING GROUP

LOTTERIES' STRENGTH REMAINS LOCAL

The modern sportsbook landscape demands that lotteries offering sports betting should evolve their strategy to compete with large-scale private operators. However, Trim sees their future success lying closer to home

The pressures facing lotteries that offer sports betting are considerable and, in many cases, unique. A newly-regulated domestic market attracts private operators with an established scale offering and often a head-start in customer engagement strategies. Investment is required in technology and best-of-breed content to stay competitive – whilst at the same time margins are being squeezed and costs increased. Furthermore, it is not unusual for lotteries to find themselves on an unfair playing field as they are bound by restrictions that don't apply to private operators – the semi-liberalised Swedish market being a case in point.

Lotteries with sportsbooks can survive and thrive against a backdrop of intense competition, as proven by Danske Spil in Denmark. To remain a market leader, Danske has had to compete strongly on the provision of global content against their corporate competition, but also run a differentiated

local strategy that ensures they remain leaders in their domestic market. As competitive pressures increase, Danske has started to evolve their strategy further by outsourcing risk management as well as pricing and trading content.

The experience of the Danish market provides a blueprint for how other lotteries should look to evolve their strategy to remain successful.

Whilst outsourcing products and services has become ubiquitous in the sports betting market over the last ten years, it is vital that lotteries maintain their ability for differentiation and flexibility. Trying to compete on the basis of a commoditised 'me too' offering may look attractive from an initial cost perspective, but it won't look attractive to the customer.

Global content based on official data is a must-have, but even more important is the market-leading provision of local content. Often, corporate operators will not have the deep local-level expertise of an incumbent lottery. Local specialisation should therefore become a key component of a lottery's strategy, leveraging the in-house expertise it already possesses to drive differentiation. Handball or Australian Rules Football are must-haves on a local level in Denmark or Down Under but niche on a global level. Partnering with a supplier that can support this local expertise through specialised "self-trade" in-play software is essential.



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Also important to strategic decision making is how this differentiated product offering can be presented to the consumer. As the market has grown, the personalisation and tone of voice of the brand has become increasingly more important. Too often the technology required to drive this is overlooked as a key part of the 'sports betting estate' that must be retained, and this can't be a trap that lotteries fall into if they want to succeed. Keeping control of a differentiated channel strategy becomes much harder for operators that follow a white-label route to market and again often sacrifices long-term success for short-term financial decisions.

Having created a competitive product set, a differentiated local offering and a unique tone of voice, the lottery has a sound footing to maintain and grow its market-leading position. However, the mantra that "turnover is vanity and profit is sanity" never changes, and driving improved sportsbook margins remains of paramount importance.

The solution to this is to offer the best prices underpinned by bespoke algorithms, overseen by expert traders. Due to the domain-specific expertise required, the risk function has previously remained in-house, but this is expensive, non-scalable and increasingly complex for industry participants.

Finding a partner to provide automated risk management solutions becomes the next strategic requirement for future success.

As a lottery, the task of building a market-leading sports betting proposition is a very difficult one. Finding a partner who can deliver best-of-breed betting content, support product and brand differentiation, improve margin, manage risk expertly, improve the efficiency of operational processes and help grow market share is almost Herculean.

We are very proud at Sporting Solutions to help Danske Spil and other lotteries solve these problems through our range of services, and empower them to deliver a strategy that has substance and style.

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