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THIS WEEK

- **Russian government takes gambling zone control**
- **UK FOBT review delayed until October**
- **Hard Rock in for Catalan casino license**
- **EU regulators sign online poker liquidity agreement**
- **Guest Columnist: Sabrina Soldá, CMO, BtoBet**

WEEK 27

FRIDAY 7 JULY 2017

TURKEY LAUNCHES ILLEGAL GAMBLING CRACKDOWN

New measures aim to tackle significant illegal gambling activity in the country



The Turkish government has announced the start of a two-year national legislation-led offensive against illegal gambling operators in the country.

A range of new measures are being considered including the amendment of current legislation, internet monitoring, and the curbing of gambling payment services (including cyber currencies). Further action proposed includes banning gambling advertisements, increasing the awareness of problem gambling and punitive fines levied on illegal online operators.

Under a three-pronged attack led by the Turkish Interior and Justice ministries in coordination with the Treasury and police departments, national regulators will investigate gaming platforms and venues to determine if they are operating illegally, with hefty jail terms being promised to those breaking the law.

According to reports in the pro-government Daily Sabah newspaper, members of the Financial Crimes Investigation Council (MASAK), Banking Regulation and Supervision ▶

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THIS WEEK IN NUMBERS



Price paid by Catena Media to acquire Bettingpro.com



Takings of Nevada poker rooms in May

The season for which Unibet has been named shirt sponsor of Aston Villa



Agency (BDDK), Revenues Department and Information and Communication Technologies Authority (BTK) will also participate in the crackdown. The multi-agency team will be headed by a “special prosecutor” whose identity has yet to be confirmed.

In addition, individuals who access illegal gambling websites through their smartphone will be contacted via SMS by the country’s Information and Communication Technologies Authority. It is hoped this reminder will prevent them from straying onto illegal sites in the future.

Gamblers in Turkey are currently only able to play legally via the Milli Piyango lottery and the state-run SporToto sports betting service, with many individuals choosing to cross the border into neighbouring Georgia to gamble in casinos operating there.

KEY POINTS

- Financial and communication agencies to co-operate as part of new efforts
- Gamblers who access illegal sites will be contacted by agency
- Severe fines and jail terms possible for illegal gambling operators.

RUSSIAN GOVERNMENT TO TAKE CONTROL OF DEVELOPMENT IN PRIMORYE GAMING ZONE

Government intercedes to jump-start failing casino resort venture

Russia’s Federal Government has revealed that it will take charge of development activity in the Primorye Gaming City area, following widespread criticism over a lack of progress in construction.

The province of Primorye Krai is located in the far east of Russia, near to both China and Japan, with officials keen to develop a casino hub which would draw gamblers from both countries and provide Russia with a new source of financial revenue.

Eight government-sanctioned casinos were to be built in the Primorye Gambling Zone with the final cost of the development expected to be in the region of RUB11.6bn (US\$350m).

At present however, only Tigre de Cristal has begun its operations, prompting authorities to step in and jumpstart the development process.

Speaking to Russian news agency TASS, Deputy Prime Minister and

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The number of Union Pay ATMs in Macau operating using KYC identity recognition technology. Those which do not have this week been suspended by the Monetary Authority of Macau



The number of teams competing in eSports event ESL One Cologne, with Betway announced as a principal sponsor

The amount PAGCOR has warned the Philippine government it could lose from its tax receipts due to casino privatisation



Plenipotentiary Representative of the President in Russia's Far Eastern Federal District, Yuri Trutnev, said: "The gaming zone in Primorye is developing slowly, and we recently held a meeting during which we decided to file lawsuits against four out of two investors in the zone] to request their agreements to be terminated because they do not do anything there."

Last month, a similar lawsuit resulted in the discontinuance of Russian company Royal Time Primorye's contract to build a casino resort in the region.

Although Trutnev did not specify the investors facing legal action, he did confirm that one of the investors, Melco has already built a small hotel in the zone but has been slow in implementing the second phase of its project.

NagaCorp Ltd, who will develop the zone's largest resort, Primorsky Entertainment Resort City had also previously been forced to delay the start of construction works following extensive archeological excavations on the site, however Trutnev commented that "now they are assuring us that they will begin

work this year and will quickly implement the project".

Trutnev added: "We have land lots for three additional residents [in the zone], with one land lot remaining unallocated and two others to be retrieved. We know that there is interest in them both among already existing investors and other investors on the territory of the Russian Federation."

The fourth and final investor, Diamond Fortune Holdings Prim has only recently started the construction of an entertainment complex with a casino in the zone.

FIXED ODDS BETTING TERMINAL REVIEW DELAYED UNTIL OCTOBER

Long awaited review delayed following general election result

A governmental review of fixed-odds betting terminals (FOBTs) has been delayed until October following a disagreement concerning regulation of the machines between the UK's Treasury and Government. ▶

06.07.17

Opening date of Imperial Pacific's Saipan casino



The number of licences issued by the Indiana Gaming Commission in its opening wave of DFS regulation (FanDuel, DraftKings & FantasyDraft)

21%



Fall recorded in net revenue of South Korean operator Paradise Casino

The Department for Culture, Media and Sport (DCMS) is conducting a review of FOBTs amid concerns that they are highly addictive and can result in gamblers losing thousands of pounds in a matter of minutes. Indeed, last year FOBT terminals took a record £1.8bn from British gamblers.

However, the UK's 34,388 FOBTs contribute around £400m in taxes every year, money which the treasury can ill afford to lose and it is therefore concerned about the impact that cutting FOBT stakes will have on this revenue stream.

This difference in opinion has been further exacerbated by the general election result, which forced the Conservatives to enter into a "confidence and supply" arrangement with the Democratic Unionist Party (DUP) in order to maintain its parliamentary majority.

Many of the DUP's 10 MPs are strongly against the concept of FOBTs and are in favour of cutting the maximum stake from £100 to as low as £2. As a result of this polarisation and the need to preserve its majority, the Government may be forced to agree to this concession.

Following the announcement during House of Commons proceedings on Friday, DCMS Under Secretary Tracey Crouch, who is overseeing the review took to Twitter to respond criticism regarding the decision to delay, claiming that it was "definitely not in long grass. Process is really important on this issue."

In an interview with the Guardian newspaper, John White, Chief Executive of amusement arcade trade body BACTA said: "The news that the DCMS will now not announce the review into maximum stakes and prizes on FOBT machines until October is disappointing.

"Given that the ministerial team is identical to the one that was in place prior to the election and that the review is well underway we had hoped the document to be out before the summer recess.

"£1.8bn is lost per year on these dangerous machines. To put this into perspective, over the course of the 12-week government sign-off process the review has to go back through, £34.6m will be lost on FOBTs per week, totalling £415.2m by October.

"We urge government to expedite the process and get on with it. The evidence

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for change to the status quo is clear and compelling.”

A spokesperson for the Association of British Bookmakers (ABB) said: “Any decisions affecting an industry that serves six million customers and employs over 52,000 people, more than the rest of the gambling industry combined, should be taken on the basis of the facts and evidence.

“We remain committed to working with the Government and regulators on our responsible gambling agenda.”

The ABB have previously claimed that reducing FOBT stakes could force the closure of thousands of bookmakers and cost 20,000 jobs.

HARD ROCK APPLIES FOR CATALAN CASINO LICENSE

International operator is only surviving bidder

Global casino operator Hard Rock has applied for a casino license to build an integrated resort (IR) in Catalonia, local media reported.

US-based Hard Rock’s application to develop an IR near Tarragona, some 100

kilometres southwest of Barcelona, will now proceed to the assessment stage as the only surviving bid.

Other big casino operators such as Melco International Development and Genting Group have also previously shown interest in the Catalan project.

However, with the aforementioned companies announcing that they were stepping back from the project, the Catalan government has confirmed that Hard Rock was the only company to submit a bid before the cut-off point of 30 June.

At present, the master plan involves €2bn investment and the creation of 10,000 jobs. In a statement, Hard Rock said it was looking forward to building “a unique centre of leisure and world class entertainment in Tarragona.”

Only last week, Hard Rock announced its exit from the €500m Melco-Hard Rock IR project in the Republic of Cyprus. The company sold its 35.37% stake in the future resort, and although the company did not comment on the decision at the time, it was clear that it wanted to pursue other investment opportunities.

The Catalan government approved plans for the development of the Tourist and Recreation Complex, formerly known as BCN World, at the start of 2017.

FOUR EU REGULATORS TO SIGN POKER LIQUIDITY AGREEMENT

Measures could breathe new life into fading online poker market

The gaming regulators of France, Italy, Spain and Portugal have announced that they will enter into an agreement concerning liquidity sharing between their regulated online poker markets.

Announced through ARJEL, the French regulator, the agreement “will set the basis for cooperation between the signing authorities in this context and will be followed by further necessary steps within each of the jurisdictions involved in order to effectively allow for liquidity poker tables.”

To be signed on 6 July in Rome, the full scope of the arrangement, covering areas including taxation and each jurisdictions’ regulatory responsibilities, will be revealed shortly after. ▶

Online poker has experienced something of a decline in recent years, with liquidity sharing arrangements between different jurisdictions viewed as a means of breathing life back into the vertical.

Warwick Bartlett, CEO of Global Betting and Gaming Consultants, shared his thoughts on the development with Gambling Insider: "Any news on shared liquidity is a good thing for poker so we at GBGC welcome this announcement. Poker has been in decline because of the current regulation and one would hope that this good news would give the game a welcome boost.

"Arresting a decline is no easy matter, those players are spending money elsewhere and it may be difficult for poker to get back to where it was. However, shared liquidity is a start on that process."

Lorien Pilling, GBGC Director added: "Online poker is a P2P game and is more dependent on liquidity than sports betting or casino games. As such, it is no surprise that online poker was at its height when US players were in the pool – a large population of poker enthusiasts.

"One of the reasons poker has declined in recent years is the reduction and

fragmentation of player pools by having ring-fenced poker markets. Liquidity sharing, therefore, is clearly to be welcomed. Although it is by no means certain that the European recreational poker player will return to the game."

WARNER BROS SETTLES LAWSUIT OVER LORD OF THE RINGS SLOTS

Settlement ends five-year intellectual property dispute

International media giant Warner Bros has agreed an out-of-court settlement with the estate of fantasy author JRR Tolkien, ending a five-year long legal dispute over the use of characters from the Lord of The Rings in its online slots.

The dispute first began in 2012, when the author's heirs received a spam email highlighting the existence of The Lord of the Rings: The Fellowship of the Ring online slot game, developed by gaming company Microgaming under licence from Warner Bros.

The Tolkien estate and publisher HarperCollins then launched an \$80m lawsuit against Warner Bros, claiming that

the studio never had the rights to licence usage of the films characters for use in gambling related gaming.

Licensing rights were initially granted to Warner Bros distributor United Artists by the author himself back in 1969; however the estate claimed that this only licensed the production of "tangible personal property" based on the books including "figurines, tableware, stationary items, clothing and the like".

Warner Bros eventually countersued the Tolkien estate, claiming that "because of the repudiation, Warner has not entered into license agreements for online games and casino slot machines in connection with The Hobbit, a form of customary exploitation it previously had utilised in connection with the Lord of the Rings trilogy, which has harmed Warner both in the form of lost license revenue and also in decreased exposure for the Hobbit films".

No financial settlement was disclosed, however Bonnie Eskenazi, an attorney for the Tolkien estate told the New York Times newspaper that: "The parties are pleased that they amicably resolved this matter and look forward to working together in the future." ◀

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NATIONAL HARBOR COMPETITION CONTINUES

The additional competition from MGM Resorts' National Harbor continues to chip away at Cordish Cos. Maryland Live! and Caesars' Horseshoe Baltimore.

Total state same-store revenues slipped 13.95%, pulled down by those two properties.

Casinos further outside National Harbor's purview have held up, actually seeing revenues rises in the mid-to-high single digits aided by a strong calendar.

June had nine Fridays and Saturdays this year against eight last.

US STOCKS

Only three gaming stocks in the US hit 52-week closing highs with a short trading week given the July 4th holiday that closed the New York Stock Exchange for half a day Monday and full day Tuesday

Company	Closing High as of Wednesday
Tropicana	\$43.19
Golden Entertainment	\$21.62
Inspired	\$13.15

Note: Same-store factors out National Harbor, which has not been open a full year

Property	Revenue (m)	% change
Ocean Downs (CHDN/Saratoga)	\$5.551	+9.51
Rocky Gap (GDEN)	\$4.520	+8.56
Hollywood Casino (GLPI)	\$6.337	+5.85
Horseshoe Baltimore (CZR)	\$22.096	-9.62
Maryland Live! (Cordish)	\$41.840	-22.08
National Harbor (MGM)	\$50.136	N/A
State total	\$130.480	+39.75
State same store	\$80.344	-13.95

GUEST COLUMNIST:



SABRINA SOLDÁ

CMO, BTOBET

TECHNOLOGY, CUSTOMISATION AND PERSONALISATION

Soldá discusses the three pillars that support a truly effective mobile betting User Experience (UX)

Mobile gaming is already an incredibly broad market, and even though smartphones seem to look alike year after year, they are advancing at an incredibly fast pace. Mobile UX design and the way data is presented on smartphone devices are both advancing just as quickly. The Flat UX that has been roaming the world of mobile interface is evolving in what has been described and named as 'Complexion Reduction'. This is a trend to make things simpler and less complex for the user, and has been adopted in line with the evolution of technology and the fast rise in data consumption.

Today, bettors are exposed to a huge range of sports, events and bets. The selection of events must be quick and customers need suggestions to access their preferred content, preferably in one click. But there are clearly lessons to be learned for sports betting apps from how the industry has developed to date. For example, studies concerning mobile sports betting app design have demonstrated that the issue of navigation is the most obvious obstacle in providing players with a truly personalised offering. You may ask, "What's the solution then?"

I firmly believe the answer lies in providing a "true personalisation" of the user experience. This means giving a layout that is designed around the single user and the device it will be viewed on. But that is not enough. In my opinion, for an excellent UX to be considered optimal it must be accompanied by the ability of the operator to anticipate bettors' wishes, and from there provide a compelling service together with a unique experience. It is the key to attracting punters, giving them a unique experience and keeping them loyal to the brand.

To fully exploit the mobile channel, operators need to be able to offer the right product at the right time. This is true customisation, and given the correct rewards - and without having to rely on possibly intrusive blind bonuses and push notifications - it will see players coming back time and again to their offering.

Considering mobile devices are progressing with more potent functionality, it also means the apps that accompany

these devices will need to be even more robust, easy to use and customised. But it is not just a clever combination of technology – analysis – suggestion. Here's another important factor to consider in how the brand conducts its interactive communications; once you have a personalised relationship with your clients, then you really must consider how you are communicating with them in order to ensure you boost their loyalty. Mobile is perfect for this purpose. Actually, mobile dominates our lives, managing all aspects of our daily lives from entertainment through to banking. Betting is an element of that and mobile is increasingly becoming the principal device for betting and gaming in all the markets we are expanding our business, in Europe, Africa and South America.

Entertainment and communication are fundamental facets to improve the mobile experience and the use of special bonus offers, customisable interactive avatars and push notifications. Avatars are perfect examples of tools to entertain the user via mobile. At the same time they drive them to collect bonuses in physical premises.

Augmented reality, for instance, is a very exciting development and many people are already looking at it as a very interesting marketing tool. Imagine players being able to navigate via mobile and walk around in the real environment and focus on tags to find bonuses, superimposed over the real world. In this way, they can collect bonuses in an augmented environment and use them in shops or online.

To conclude, I think these are extremely interesting developments and will further enhance the capability of sports betting operators to engage, capture and entertain customers in a very personal and customised style.

As BtoBet Chief Marketing Officer, Sabrina plans and implements BtoBet's inbound marketing strategy to drive awareness and demand in the global market. She has over 15 years of experience working closely with multinational advertising agencies and has enjoyed a successful career as a Marketing and Communications manager for many companies in the iGaming industry.

On 11-14th July, BtoBet will be sponsoring the VIP Area Lounge during the iGaming Super Show in Amsterdam and in this exclusive space the company's experts will provide visitors with live demos to discover the features of their advanced sportsbook platform, tech tools and the full potential of mobile UX.

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