



WEEK 28

FRIDAY 13 JUL 2018

BREXIT TURMOIL LEAVES THE GAMBLING INDUSTRY DIVIDED

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THIS WEEK

- **Packer vacates board due to health issues**
- **Monmouth Park moves to sue sports leagues**
 - **Sportradar valued at \$2.4bn due to new investment**
- **Adelson sets his sights on North Korea**
- **iGB Live! Event Preview**

GUEST COLUMNISTS:

**Melissa Summerfield,
Andrii Lysiuk &
Rakesh Chablani**



The continued uncertainty surrounding the UK's relationship with the EU after Brexit has led some gambling operators to take precautions, raising alarms for gambling firms who employ European staff. However, many analysts are still standing by the notion that Brexit and all its uncertainties will not impact the gambling industry.

In the UK, Theresa May's Conservative government was rocked by the sudden and unexpected resignations of two Cabinet ministers, Foreign Secretary Boris Johnson and Brexit Secretary David Davis this week. Their disagreements over Brexit, which will happen in March 2019, further highlight the varying views in the UK over what the country's relationship with the EU will be.

Tony Coles, a Consultant with Gordon Dadds, a law firm specialising in gaming and betting law, claimed that Monday's Cabinet resignations would have "absolutely no impact at all" on the UK gambling sector. Coles explained that as gambling is not an EU-regulated activity "It won't make a difference". Harris Hagen consultant, Hilary Stewart-Jones, agreed that the resignations are "irrelevant" to the industry. However, Brexit uncertainty has already stoked fear amongst gambling operators in Europe, meaning that the latest Cabinet resignations will only exacerbate the issue. Last week, Gibraltar increased its license fees and lowered gross revenue taxes for gambling companies, in an attempt to hold onto operators in the event of a bitter Brexit breakup with the EU. ▶



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THIS WEEK IN NUMBERS



166

The number of people arrested in Malaysia for illegal sports betting on the World Cup

\$21.6m

The revenue taken by Pennsylvania Online Lottery in its opening month



\$30,000

The annual loss limit introduced by Finnish company PAF based in Aland

"It is undeniable that the Gibraltar based remote gambling industry remains the most significant in Europe, if not the world, but it is now sailing into headwinds," Minister for Financial Services and Gaming, Albert Isola, said. "These are created by the uncertainties of Brexit and challenges around the EU market access."

Joerg Hofmann, Senior Partner at Melchers law firm in Heidelberg, told *Gambling Insider* that he sees no advantage for the gambling industry once the UK leaves the EU in March 2019. "Employees in the gaming industry are restricted because they may no longer be able to refer to the freedom of establishment and the freedom to provide services across borders," Hofmann said. "Employees in England will have to worry about their professional future, depending on their legal status and the results of the Brexit negotiations. Developments in gambling regulation in the UK will – probably – no longer have to be measured directly against the yardstick of the EU principle of non-discrimination."

Mr Hofmann added that post-Brexit, there may be regulatory implications that restrict UK-based operators, noting that "the UK will leave the area of competence of the EU supervisory authorities".

"In addition, the development of gambling regulation within the European Union will in future - at least not directly - be shaped by one of its most important and experienced gambling supervisory authorities to date. It remains to be hoped that the exchange with the Gambling Commission will also take place post-Brexit."

According to Gavin West, Director at Ampla Consulting, gaming taxes will not be affected by Brexit as they are governed by national legislation and "not subject to any EU directives".

Currently EU businesses are able to simplify VAT reporting requirements through MOSS (Mini One Stop Shop). With MOSS, operators can avoid registering for VAT in each EU State where they operate. Post-Brexit, the issue facing companies is the fact that some operators are registered for MOSS in the UK. The MOSS scheme extends to operators from outside of the EU but the criteria and rules differ. Starting in March 2019, UK operators will be moved from the Union Scheme to a non-Union Scheme which will then require operators to register for VAT where they do not have an establishment.

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2.2%

The pay increase given to 295 LVCVA union employees in 2018 after a new agreement was met



7874

The number of players involved in the World Series of Poker main event, 500 more than last year's event



183 - 46

The result of the vote on Japan's Gambling Addiction Countermeasures, considered to be the last vital step before passage of the IR bill



JAMES PACKER VACATES BOARD DUE TO HEALTH ISSUES

Australian billionaire and casino mogul James Packer has left his position on the board of his family's private investment company, Consolidated Press Holdings, due to mental health issues.

The announcement was first made on 27 June via a notice letter released by the Australian Securities and Investment Commission (ASIC).

"CPH has long been the principal Packer family investment vehicle, controlling media assets, Crown Casino and the family's \$6-7bn of wealth," a CPH spokesperson spoke told *ABC News*.

"So, for James Packer to resign from that board is a very significant matter and obviously comes after resigning from all public company boards."

Consolidated Press Holding will retain Packer's 47.2% stake in Crown Resorts and his various other business ventures.

The company will also acquire half of his assets, which include US property website Zillow, Asian focused online job marketplace Zhaopin, Australian fashion group PrettyGirl, and Ratpac Entertainment.

The news will further increase concerns about Packer's wellbeing which have been

growing since his initial departure from Crown Resorts in December 2015, when he cited a refocusing on his plans in Sydney, Melbourne, and Las Vegas as he "transitioned overseas".

Packer only returned to the Board of Crown Resorts in January 2017, however, his time back at the company saw several stress inducing events.

These included the arrest and release of ten Crown Resorts members from Chinese jail for promoting gambling in the country as well as slot-machine tampering claims brought forward by three people claiming to be ex-employees.

In March 2018 Packer's struggles became public knowledge when Crown Resorts announced that Packer had resigned as a director of the company citing 'personal reasons' for his departure.

The resignations from the board of Consolidated Press Holdings means that Packer can finally concentrate on his personal issues and mental health problems while Crown Resorts will have to continue without the well known casino mogul at its helm.

THE WEEK IN QUOTES

"This acquisition represents a pivotal moment in The Stars Group's evolution. SBG's mobile-focused sportsbook pairs well with our industry-leading poker offering to create two premier customer acquisition channels. We believe this combination along with our combined online casino offerings positions The Stars Group for continued growth in the evolving online gaming industry"

Rafi Ashkenazi, The Stars Group's Chief Executive Officer, on the acquisition of Sky Bet

"We strongly support measures to clamp down on irresponsible gambling advertising in order to protect consumers – but a total ban on advertising is counterproductive to this. The Government should instead focus on encouraging responsible gambling advertising which sufficiently directs consumers to the regulated operators and at the same time does not entice problem gamblers or young people to gamble"

Maarten Haijer, Secretary General at the European Gaming and Betting Association (EGBA), on Italian gambling advertising ban

MONMOUTH PARK MOVES TO SUE MAJOR SPORTS LEAGUES

The Monmouth Park racetrack, New Jersey's first legal sports betting venue, is looking to recoup \$150m from the major sporting leagues for the part they played in blocking the state from legalising sports betting over the last four years. The New Jersey Thoroughbred Horsemen's Association (NJTHA), the group that owns the racetrack, filed the case in May. "The leagues made a losing bet," said the racetrack owner in its federal court filing. "It's time to pay up." The lawsuit singled out the commissioners of the four major league sports organisations the NBA, NHL, MLB and NFL as well as the NCAA who supported PASPA while at the same time building relationships and business connections with daily fantasy sports providers.

The racetrack's attorney, Ronald J. Riccio stated in his filing that "the commissioners falsely described to this court in meticulous detail the catastrophic consequences they swore would follow from the spread of sports betting. None of this was close to being true." Of the four major sports leagues the NBA, NFL and MLB have ownership stakes in either DraftKings or FanDuel

which are the two major venues for daily fantasy gaming. On top of this 91% of NFL teams have had engaged in a partnership with either DraftKings or FanDuel.

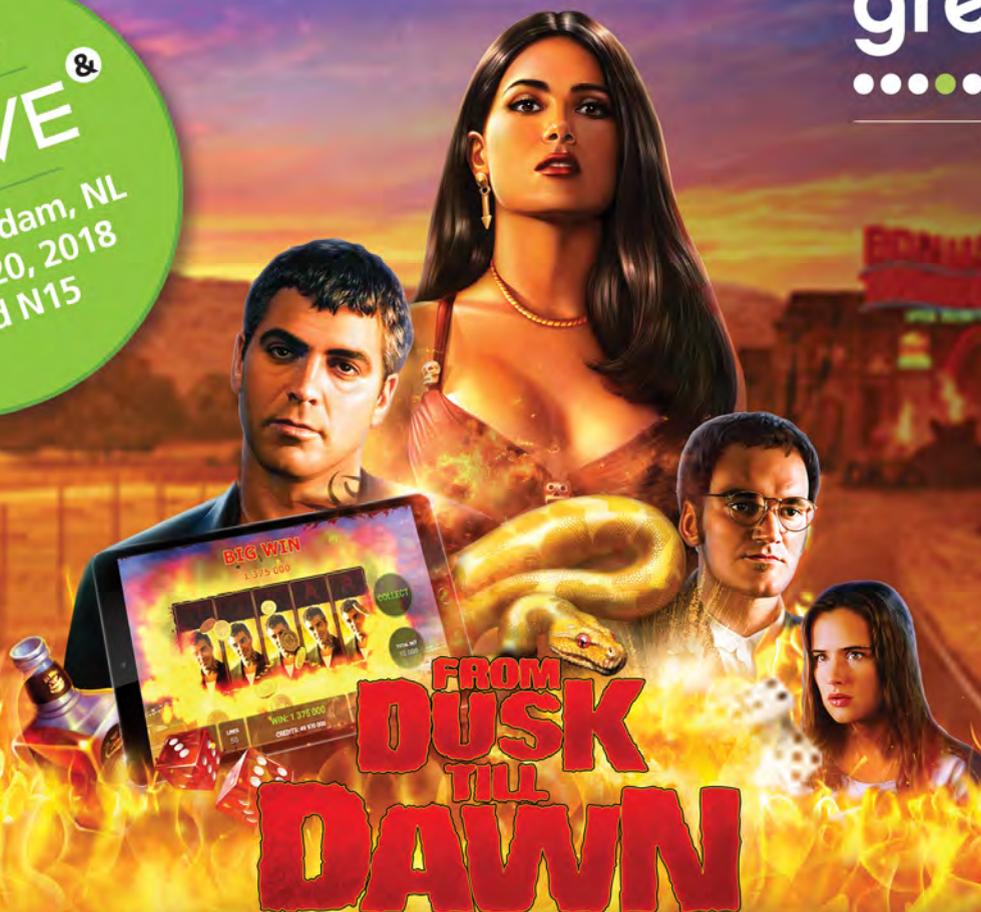
The first order of business for Monmouth Park is to get the leagues to pay a \$3.4m bond that they took out in 2014 when they moved to block New Jersey from legalising sports betting. This bond was put in place by US District Judge Michael A. Shipp who blocked Monmouth from taking sports wagers in 2014 but forced the leagues to include an injunction which would require them to compensate the racetrack if it were found that they had been "wrongfully enjoined" from accepting wagers on sports.

Shipp calculated the \$3.4m bond based upon a calculation that Monmouth Park would lose \$850,000 a week by not being allowed to take sports wagers.

The sporting leagues have until 16 July to file a formal response to Monmouth Park's suit. In a letter to the judge that is reviewing the matter, the leagues referred to the racetrack's request for compensation as "meritless, if not frivolous".



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“LeoVegas is the leading GameTech company in the industry, and I have a passion for working with fast-growing tech companies. I am looking forward to being part of LeoVegas’ continued journey of growth and optimising LeoVegas’ operations, with sustainability as a guiding principle”

Richard Woodbridge on his appointment as CEO at LeoVegas

“The new Ladbrokes Coral integrated bet slip is a significant step forward for the live casino experience. Sports fans no longer have to choose between playing roulette and keeping up-to-date with the big events”

Kevin Kilminster, Head of Live Casino Innovation for Playtech discussing partnership with Ladbrokes Coral

“The new company embodies the strengths of TVG, Betfair US and FanDuel and brings together the brilliant talent, technological expertise, and shared resources to capture the US market opportunity in front of us”

FanDuel CEO Matt King, who will serve as CEO of FanDuel Group

SPORTRADAR VALUED AT \$2.4BN DUE TO NEW INVESTMENT

European-based sport data analysis company, Sportradar, has been valued at \$2.4bn after announcing two new strategic investors, which will allow the company to branch out in to the US.

The company announced that EQT Partners, a Stockholm-based private equity firm, had sold its 35% stake in the company to the Canada Pension Plan Investment Board (CPPIB) and TCV an investment firm based in Silicon Valley. Other minority shareholders also sold their shares according to Sportradar.

“Having two new investors with a strong North American footprint is ideal given our increasing focus and expanding operations in the US, as the sports industry evolves to meet the expectations of today’s sports fans,” said Sportradar Founder and CEO, Carsten Koerl.

“CPPIB and TCV are both known for extensive global tech experience and a track record for working alongside innovative management teams to help achieve their long-term vision.”

Koerl will retain his entire ownership position in Sportradar while EQT plan to reinvest a chunk of the money from the sale of its shares back into the company.

EQT has backed the company since 2012, when one of its funds invested €44m to take a minority stake in the group. According to EQT, Sportradar had sales of €286m last year, up from €91m in 2014.

Since the ban on sports betting has been lifted gambling operators and sports leagues have been frantically trying to take advantage before the window of opportunity closes, putting Sportradar in a strong position to gain even more clients and business opportunities.

“We are thrilled to have the opportunity to work with Sportradar’s management team as they drive the company forward across new customer segments and geographies,” said Alain Carrier, Senior Managing Director and Head of International at CPPIB.

The transaction is expected to close in the final financial quarter of 2018.

WINNERS

NOVOMATIC - The company was awarded a 15 year licence to operate a casino in the Spanish city of Granada

Ohio - The state's gambling revenue was up 2% for the first half of 2018, with three of the four state owned casinos reporting increased revenues

Churchill Downs and El Dorado - The two came to an agreement to terminate Lady Luck Casino Vicksburg Transaction

Macau - Nomura, the Japanese brokerage is halving its year-on-year growth estimate for Macau's VIP gross gaming revenue in 2019, from 14% to 7%

WeChat - 50000 accounts were shut down to prevent wide spread illegal sports betting

LOSERS

SHELDON ADELSON LOOKS TO EXPAND IN NORTH KOREA

Sheldon Adelson, the casino magnate and a friend of President Donald Trump is interested in building a casino in North Korea, according to a Casino News Daily report.

The chairman and CEO of Las Vegas-based gaming said at a charity event in Jerusalem that he hopes that President Trump could find a resolution to the conflict between North and South Korea so that he could return to the country and expand his business.

Adelson and his wife, Miriam, donated \$70m this year alone to Taglit-Birthright Israel, the organisation providing free ten-day trips to Israel for thousands of young Jews, as stated in the Times of Israel.

North Korea leader Kim Jon Un recently expressed his desire to expand the gambling market when meeting President Trump in Singapore on 12 June.

During the meeting, Kim suggested that the US should try and help build a casino in the country as part of its plan

to develop an international tourist resort on the Wonsan-Kalma coast, according to *Casino News Daily*.

The South Korean Government has estimated that the tourist zone will generate approximately \$50m per year for North Korea, a relatively large sum of revenue for a country whose annual trade volume is \$7bn.

The resort is expected to open by the 15 April next year and whether or not the casino will be part of those plans remains unknown, according to the Strait Times.

Mr. Adelson's Las Vegas Sands would be a likely candidate for any casino project if an opportunity for expansion arises.

Mr. Adelson was one of the main supporters of Trump's 2016 presidential campaign.

Las Vegas Sands Corp operates several resorts properties in Las Vegas, Macau, and Singapore, and has continued to explore the possibility of expanding in new markets including Japan, Brazil, and the Philippines.

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REGIONALS RISING

VUS regional states with casinos have posted widespread revenue rises for June.

Indiana's revenue grew by 4.79%, the state's best year-over-year comparison since November.

The Rising Star took the lead with a 19.13% increase in revenue, generating \$4.278m.

The casino was followed up by Tropicana and French Lick who both respectively increased their revenue by 16.65% and 14.69%.

Missouri's state total revenue increased by 6.13% to

INDIANA:

PROPERTY	REVENUE (\$M)	CHANGE (%)
Ameristar (PNK)	18.679	+6.43
Majestic Star	12.447	+3.33
Horseshoe (CZR)	32.084	-0.71
Blue Chip (BYD)	12.739	-2.91
Indiana Grand (Centaur)	20.530	+10.42
Hoosier Park (Centaur)	15.812	+7.76
Rising Star (FLL)	4.278	+19.13
Belterra (PNK)	9.873	+5.05
Hollywood (PENN)	14.326	+3.80
Tropicana (TPCA)	12.092	+16.65
French Lick	8.617	+14.69
Horseshoe (CZR)	20.234	-1.00
INDIANA TOTAL	181.709	+4.79

MISSOURI:

PROPERTY	REVENUE (\$M)	CHANGE (%)
Argosy (PENN)	13.871	+11.07
Ameristar (PNK)	16.031	+7.19
Harrah's North KC (CZR)	14.592	-0.81
Isle of Capri (ERI)	5.825	-5.74
Lumiere Place (TPCA)	14.910	+21.16
River City (PNK)	19.310	+7.81
Ameristar (PNK)	22.234	+4.60
Hollywood St. Louis (PENN)	19.354	+2.83
Alton Belle IL (PENN)	4.134	+2.83
Casino Queen E. St. Louis IL	8.504	-0.18
St. Jo's Frontier (Affinity)	3.694	+15.64
Mark Twain (Affinity)	2.882	+7.24
Isle of Capri Lady Luck (ERI)	3.208	+6.32
Cape Girardeau (ERI)	5.387	+3.91
Isle of Capri Boonville (ERI)	6.563	-0.60
STATE TOTAL	147.859	+6.13

\$147.859m, its best since February 2016. The state's casinos showed promising growth on the most part, excluding Harrah's North KC, Casino Queen E. St Louis IL and the Isle of Capri Boonville.

Iowa gaming revenues rose 3.83%, the best year-over-year comparison for the state since December.

Despite the generally positive figures, it is worth noting that June had one additional weekend date this year vs. last.

Below are breakdowns by property for the three states listed above.

Additionally, see below to find out the companies that reached 52-week closing highs on the stock market.

IOWA:

PROPERTY	REVENUE (\$M)	CHANGE (%)
Grand Falls (Elite)	4.804	+17.48
Diamond Jo Dubuque (BYD)	6.127	+9.14
Prairie Meadows	16.908	+8.94
Q casino	4.182	+7.90
Catfish Bend	3.355	+7.06
Horseshoe (CZR)	14.140	+6.07
Diamond Jo Worth (BYD)	7.268	+5.66
Wild Rose - Jefferson	2.477	+5.40
Harrah's (CZR)	6.261	+4.75
Rhythm City (Elite)	5.690	+4.38
Ameristar (PNK)	14.035	+3.77
Terrible's Lakeside (Affinity)	4.022	+3.67
Wild Rose - Emmetsburg	2.411	-0.36
Isle Waterloo (ERI)	6.841	-2.03
Riverside (Elite)	6.954	-2.03
Wild Rose - Clinton	2.511	-2.56
Isle Bettendorf (ERI)	5.759	-3.04
Hard Rock	6.338	-5.23
Casino Queen Marquette	2.070	-9.96
STATE TOTAL	122.155	+3.83

STOCK UPDATE

The following US stocks hit 52-week closing highs as of the close on Wednesday:

Penn National	\$35.95
Pinnacle	\$34.80
Red Rock Resorts	\$35.73
Agilysys	\$16.55

IGB LIVE! EVENT PREVIEW

17th-20th July

Amsterdam RAI, Hall 8, Netherlands



iGB Live! promises to be one of the most exciting and rewarding events of the year. The four days of conferences and networking opportunities are thoughtfully designed, ensuring that all in attendance can make new connections and learn about the latest developments in the world of online gambling.

The AAC, iGaming Supers Show and EiG have all been amongst the most highly anticipated events in the gaming calendar. Now, thanks to Clarion Gaming, delegates can

regulation and compliance, sports betting, finance, and much more ensuring whatever educational desire you have is catered for.

This year also promises to have more delegates, more affiliates, and more sponsors in attendance than ever before. This is hardly a shock considering the success of the event's previous years and its ever growing reputation within the gaming industry.

One of the most important aspects of any good event is its networking opportunities, of which

Be sure not to miss out on the start-up competition Launchpad, one of the main attractions of iGB Live! Launchpad began as part of EiG back in 2009 and has grown into one of the highlights of the show. It offers start-ups the chance to pitch their company in front of investor judges. Not only is it entertaining and fast paced, it also gives attendees an opportunity to see and connect with some of the most exciting new companies in the gaming world.

The iGB Live! location and venue reflect the magnitude of this industry-leading event. Amsterdam is the perfect place to host this innovative and entertaining gathering of gambling industry experts, affiliates, vendors, operators, and suppliers. Its central location means a quick trip on the train for most Europeans, with Amsterdam's Airport Schiphol located just 15 minutes from the venue for those coming from further afield.

Taking place in Hall 8 of the Amsterdam RAI, the largest exhibition space in the country, there will plenty of different designated areas to visit. These include a new paid for conference area named iGB Live! HQ as well as Crypto Live. There is also an area solely dedicated to crypto currencies and ICOs.

Remember to make sure you don't miss out on the events and key areas by downloading the iGB Live! app which allows you to see the entire events agenda before you step onto the conference floor. The networking tool also allows those who wish to interact with individual attendees to do so using the simple messaging function as well as allowing for you to reach a broader audience through its broadcasting update feature. This allows attendees to build a network and arrange meetings that might not have been possible in previous years or at other events. So be prepared to meet many new contacts at this year's event.

“This year also promises to have more delegates, more affiliates, and more sponsors in attendance than ever before”

cover all three of these must-attend events over just four days.

Clarion, the event's organisers, have stressed that each of the three individual shows will retain their own identities, insuring that they have their own dedicated presence and brand personality.

This year's event sessions, of which there will be 40, focus on SEO, marketing, acquisition,

the iGB Live has numerous. From the moment you arrive at the conference you will be greeted by welcoming drinks, followed by interactions on the tradeshow floors, breaks, meals, and even nights out in some of Amsterdam's world renowned bars and clubs. The city's boundless networking opportunities will allow visitors to entertain clients in any environment they desire.

Q&A WITH IGBLIVE!

Shona O'Donnell, Portfolio Director, Clarion Gaming



What was the main reason for combining the AAC, iGaming Super Show and EiG in one event?

It was in direct response to feedback from the industry. The events calendar is increasingly busy with new events being added all the time. This puts a lot of pressure on resources, both time and financial, and we wanted to help clients manage this. By bringing these events together, it allows them to consolidate and focus their marketing campaigns across the year.

What do you believe is the highlight of iGB Live! this year?

They can expect the biggest event globally for the online gaming industry. We expect to see more than 5,400 delegates across four days of conference and networking. This really is the place the industry comes to do business.

There will be a large exhibition floor where delegates can meet with suppliers, operators and affiliates. The free-to-attend content includes two days of affiliate marketing content, and an IMGL Masterclass and Launchpad where attendees can see the brightest new start-ups in the industry. We will also introduce Crypto Live!, where

you can see the latest ICOs and ideas in this space.

We are very excited about the introduction of the paid for conference area called iGB Live! HQ. The HQ includes the Hive, Boardroom, Counsel and Elevator conference spaces as well as a large networking area. This will be an amazing experiential space where delegates who attend our paid for conferences can have meetings off the main expo floor, experience new ways of content delivery and take part in curated networking.

What will be the main topics covered at this year's event?

It's a really exciting time in online gaming, and this will definitely be reflected in the programme. iGB Live! HQ is a completely new area on the show floor and off that we will host content in a completely new way. The Hive will hold curated networking on topics like African markets and US sports betting. These will be accompanied by experiential highlights like wine tasting. In the Counsel we will have debates hosted by the Cambridge University Debates Team to get to the heart of the most contentious issues right now. In addition to this, we will also have key notes in the Boardroom from Nasdaq and Blackstone. Elevator will showcase new innovations and ideas. Around all of this there will be lots of space for networking while enjoying full-service hospitality. On the show floor we also have two full days of affiliate content, including a number of insight reports that have been commissioned for the event, an iMGL Masterclass and Crypto Live!

In what ways are networking opportunities different at this year's event?

iGB Live! will offer more than 15 different networking events over four days, so there is a lot to pack in.

Because there is so much happening, with specific events for Bingo, Sports betting, Slots, Crypto and Lottery, plus all of the main parties, I strongly recommend that people have a look at the agenda on the app and plan their time in advance so that they don't miss anything.

What changes will there be to the Launchpad competition?

The start-up Launchpad has been providing a platform to new, aspiring iGaming businesses since 2009 at EiG and it has always been one of the highlights at the event. We'll be bringing it to iGB Live! in a similar format, with five start-ups selected from a group of about 20 that applied. The start-ups will each get a few minutes to pitch their company (not just product) in front of the investor judges and in front of the iGB Live! audience. The judges this year are Evan Hoff from Velo Partners, Richard Glynn from Alinsky Partners, Andrew Burnett from Burlywood Capital and Marcel Tobler from innovation21. They are also sponsors of this year's Launchpad and will quiz each startup, but it will be up to the audience to choose the winner. We have selected the start-ups and will be announcing them soon. The quality of the submissions once again has been very strong and, not surprisingly, AI is the prevailing trend we've seen in submissions this time. The Launchpad will be accessible to all iGB Live! visitors, so it's a great opportunity to see the new ideas and trends in the sector.

What are the benefits of hosting iGB Live! in Amsterdam?

Amsterdam is a great city, especially in the summer. There are lots of great bars and restaurants so it's perfect for entertaining partners. It's also a great hub making it easy to travel to no matter where you are based. We've been in Amsterdam for five years now so you never know when it might be your last chance to visit.

PRE-SHOW Q&A

Vassilis Trochalidis, CEO, Bit8 CEO



It is not only about the sponsors and the exhibitors, it is also about the attendees, where Bit8 can discuss potential new business and relationships.

How are Bit8 looking to utilise the platform of iGB Live! To gain exposure for your platform?

For Bit8, iGB is an especially important channel, as with the event, we want to further expose the importance of the platform and get the Bit8 message a cross. Bit8 is a comprehensive, player centric platform that offers cutting edge features to operators. It is a powerful tool, that attracts the new generations, offering versatility and compliance across multiple jurisdictions.

What major topics and trends are you most excited about being covered at this year's event?

The team behind Bit8 has the knowledge

and experience that produce the tools to innovate within the industry, continuously work to improve and increase connections, with third party suppliers and service providers. We are cross-selling across all verticals and consistently safe-guarding player loyalty and engagement, for a healthier and self-sufficient player lifecycle.

What networking opportunities are you looking forward to?

Bit8 is interested in several topics regarding European regulatory developments and effective retention techniques as we are always striving to further improve many speaker sessions as possible with the team we have coming, and we shall also be attending the LaunchPad competition, however our primary focus is the networking. We have several meetings already set up and we are hosting the B2B Bar so we are pretty sure that we will have quite a few more coming up.

In your opinion what is the unique appeal of iGB Live! for you?

The range of different exhibitors and participants from the various sectors that together form the gaming industry makes iGB Live! interesting and unique. Game providers, affiliates, payment providers and platform and technology providers such as Bit8, are all getting together to provide a comprehensive forum, ideally suited as a networking event.



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PRE-SHOW Q&A

Robert Dowling, CCO, Ganapati Malta



In your opinion what is the unique appeal of iGB Live! for you?

To be able to find most of the industry's market leaders and shapers under one roof is of course the obvious benefit, but ultimately having various verticals

from vendors to operators to affiliates creates dialogues that might lead to new partnerships, having the potential to change our future business dynamics. iGB Live! HQ is a whole new way of studying the latest trends in the industry and we are very excited to experience it.

How are Ganapati looking to utilise the platform of iGB Live! to gain exposure for your products?

Through this platform, we are hoping to extend our exposure in addition to gaining more market share. Using this show to get clear visions of our clients' expectations by direct conversations makes this a platform that would prove to be valuable in this ever growing market. We are looking forward to being able to thoroughly enjoy iGB Live! to its fullest this year as we have decided to just attend the event rather than exhibit. Already we

have locked in an almost full schedule with existing and new clients.

What do you see as the benefits of having iGB Live! in Amsterdam?

Amsterdam is for one a very well connected hub, easy to get in and out of this city due to its fantastic rail, air and road links. Plus the added advantage of the Dutch hospitality and it being one of the great cultural capitals with such a large international community that brings people together, makes it a perfect hub for an exhibition.

Have you scheduled in time to watch the Start-Up LaunchPad competition?

Yes I have and I am looking forward to this year propositions. Listening to start-ups present is always such a great way to refresh the brain and excite oneself for what possibilities there are to shake up this market.

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iGB Live Stand M16



PRE-SHOW Q&A

Suren Khachatryan, CEO, Digitain

exposure for your platforms?

As a business, we are delighted to support iGB Live! as a sponsor, and therefore our brand shall be evident at this inaugural event. Our team is on hand at our stand N-30 to discuss any opportunities that operators may have to upgrade, or to replace their existing technology stack with Digitain's omni-channel platform and solutions. Of course, you can be assured of a warm and friendly meeting with our team, even if you just wish to pop by and say hello.

What major topics and trends are you most excited about being covered at this year's event?

iGB Live! has attracted some excellent keynote speakers, so from a sports betting perspective it shall be interesting to learn how operators have fared with their existing technology vendors during and after the World Cup. Of course, this post World Cup analysis would include how platforms have scaled during the peak

demand times, what marketing offers worked in attracting new players and reactivating lapsed ones, to the most crucial metric risk management and margins attained during the event.

The other trending topics shall be the market opportunities in the US and further regulation of markets in Europe, for example, Sweden in 2019 and could the recent blanket ban on advertising in Italy signal headwinds in other EU regulated markets.

What networking opportunities are you looking forward to?

Our meeting schedule at our stand is already nearing full capacity, so I'm not sure we shall have a lot of opportunity to network. That said, as iGB Live! is a new event, we expect a lot of buzz and energy and fully expect the positive dialogue on industry topics to be had at our stand during the day, and in the various networking events held into the long hours of the evening and early mornings.

In your opinion what is the unique appeal of iGB Live! for you?

iGB Live! is a new experience in the online gaming event calendar as it now incorporates three of the industry's established trade events, AAC, iGaming Super Show and EiG all under one roof and in one central venue location.

Therefore as an event, it provides all stakeholders in the online gaming industry the opportunity to experience all the moving parts in our very dynamic ecosystem and to meet with existing colleagues, customers and forge new relationships with new customers and suppliers.

How are Digitain looking to utilise the platform of iGB Live! to gain

PRE-SHOW Q&A

Julia Salagaeva, Head of Business Development and Corporate Communications, Connective Games



In your opinion what is the unique appeal of iGB Live! for you?

The decision to bring the iGaming Super Show, EiG and the Amsterdam Affiliate Conference together under one roof makes iGB Live! a one-of-a-kind event. For Connective Games, it delivers more value and appeal than

many of the other conferences on the circuit. This is due, in part, to the calibre of delegate iGB Live! attracts, the quality of the speakers taking to the stage, the wide range of exhibitors and the various networking opportunities offered throughout the expo.

How are Connective Games looking to utilise the platform of iGB Live! to gain exposure for your software?

We will use iGB Live! to showcase our platform, products and services to partners old and new. iGB Live! attracts a wide range of delegates from online gaming operators across the globe, so it provides a huge opportunity to engage and converse with these people. As regulated online gambling continues to roll-out across markets such as Asia, Latin America and the USA, we see a huge opportunity to work with operators to power their online poker sites, and iGB

Live! allows us to meet with the decision makers at these companies.

In addition, the conference allows us to meet with existing partners and discuss the new products we are developing, and how we can work more closely together to provide them and their players with a world-class poker and/or casino offering.

What major topics and trends are you most excited about being covered at this year's event?

For Connective Games, it is very much about new markets in Asia, Latin America and the USA as regulatory frameworks continue to be put in place across these jurisdictions. We see a huge opportunity for poker to become one of the most popular games in these markets – skill games reign supreme in the likes of India – and we are excited to talk with delegates and experts about the progress being made in these territories.



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GUEST COLUMNIST



MELISSA SUMMERFIELD

CCO, PRAGMATIC PLAY

A sporting chance – do sports tournaments boost the opportunities to create themed games?

We have been treated to a fantastic festival of sport so far this summer, with the World Cup engaging billions of football fans all over the globe with great team performances, moments of exceptional skill and, of course, the odd controversy here

and there. Wimbledon is in full swing as I write this column, Rafael Nadal vying for an 18th Grand Slam title, while Serena Williams will no doubt be battling at the sharp end of the women's tournament with fellow giants of the modern game Angelique Kerber and Jelena Ostapenko. And with the European Sports Championships and Ryder Cup just around the corner, it's fair to say that 2018 holds plenty of promise for more excitement.

Keep your eye on the ball

Large sporting events such as the World Cup present great opportunities for the sports-betting marketplace. Acquisition marketing around this year's tournament has been a huge focus for operators as they seek to drive higher player lifetime value.

Agile suppliers with the capacity to build well-constructed sports-themed games represent strong

partners from a cross-promotional perspective. Converting video slots players to sportsbook fans, and vice versa, presents its challenges for operators, but smartly-executed sports slots can play a key role in bridging this gap. For example, presenting sports bettors enjoying wagering on a particular football fixture with a themed video slot to play during the half-time break can be a simple and effective way of encouraging a few spins that could convert the player to online casino in the long term, thereby driving higher player LTVs.

Furthermore, timed free spin campaigns and tournaments can be easily set up to take place alongside the real-life matches to maximise cross-selling and margin-driving potential across both the casino and sportsbook verticals. This system can be used in the same manner to promote any important future matches. One great

tool for cross-promotion is free spins; awarding sports bettors free rounds as prizes for winning or losing sports tickets. By efficiently deploying intuitive and immersive games, operators can help recreational players to understand how to play slots.

Driving long-term value

Undoubtedly, it is vastly important that sports-themed games can continue to deliver long-term value after a competition has reached its conclusion. There is limited sense in delivering a game that links up with a single sporting event, only to see its relevance fall away after the tournament, and its player numbers with it. Much of this long-term value can be driven through simply building the game on a foundation of expertly-modelled underlying mathematics to drive longerplay sessions. In addition, cleverly constructed bonus features that build on the theme, such as the interactive penalty shootout feature

in our recent football-themed release, the champions challenges players to pick their spot in the ultimate test of nerves.

To put it simply, leaning too heavily on the theme alone, and expecting it to do all the work in terms of driving both the initial click and player retention is unlikely to lead to long-term success. While the sporting theme can be a crucial driver of player engagement through a sporting event and beyond, it is ultimately the gameplay that will see the title power player returns.

We created The Champions to engage the player in many ways. Firstly, it allows the theme and therefore the experience to be personalised, by letting the player choose their favourite international team. The player's selection then changes the graphics of the game to the general colours of that team. Players can level up the experience by sliding a target up and down the reels to take shots on goal, and the

more goals you score, the greater the momentum as the win multiplier increases, totalling a maximum of 20.

The game has been crafted to transcend the scope of gambling and become an immersive football experience. It provides an intuitive and engaging gameplay process that will keep players entertained long after what promises to be a jam-packed summer of sport.

The game has been performing strongly throughout the World Cup, and we have every confidence that the video slot's rich feature-set and customisability will continue to drive popularity long after the tournament draws to a close.

Sports tournaments represent a fantastic opportunity for forward-thinking providers to get ahead of the game with themed titles that cater to a clear player demand, and coupling those themes with great gameplay and promotions can help set both providers and their partners apart from the competition.



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GUEST COLUMNIST



ANDRII LYSIUK
BUSINESS AND
SYSTEM ANALYST,
BETINVEST

Lysiuk discusses the nature of business analysis in gambling industry

There is a subtle truth in the field of business analysis that the best business analysts never forget: we don't know how much we don't know. That's correct: in the business of risk assessment, it is a distinct advantage to be able to say "I don't know", and the most successful analysts, those with an established record of success, are those who've shown they know how to act when the odds are the most uncertain. Consider the following facts:

- Worldwide, one of every five children born is Chinese.
- The ancient Phoenicians couldn't have invented the first alphabet: there no books in Phoenecian.
- The Hagia Sophia and the Pyramids at Giza prove that ancient architecture is superior to modern.

In the first case, a Ukrainian couple might decide to have only four children. Who knows how their town would react when son #5 was born and he was Chinese? In the second example, our fixed idea of what is the function of an alphabet has closed our minds to other uses for writing. What silent evidence have we chosen to ignore? Why would the Phoenecians need writing if they didn't like to read? Finally, in the third example, we have fallen for one of the most common mistakes a person can make –allowing a small sample to serve as the rule for everything. How many thousands, millions of ancient buildings have fallen, and we ignore even the possibility of their existence because we've never seen them?

Simply put, the best kind of business analysis is one that constantly asks itself before making a decision: what am I not seeing? One tool that many inexperienced analysts rely on, indeed, a tool that has grown in popularity through recent "popular science" books on the subject, is the tool of intuition. Gut instinct, or the ability to judge built into our biology.

The problem, however, is that we have to use our instincts today in a far more complex world than in the primitive world in which they developed. Nassim Nicholas Taleb, perhaps the world's most respected thinker on chaos theory, randomness and risk assessment

has said: "The instinct to make inferences too quickly, to "tunnel", that is, to focus on a small number of sources of uncertainty remains ingrained in us. This instinct, in a word, is our predicament.

"Surely, there is value in instinct as an evaluation tool. The problem is learning how to use it. And when to ignore it. And for important business decisions, the best analysis indicates it is a good idea to ignore your "gut" most of the time. Karl Popper, the greatest British philosopher of the previous century had this advice: "understanding how to act under conditions of incomplete information is the highest and most urgent human pursuit." In other words, good business takes time. It takes, slow, solid analysis.

It takes a willingness to say, "I don't know". In any business, the odds at success are only as strong as your command of the tools available. In the world of business analysis, the tools have grown in complexity over the last twenty-five years, and the best analysts have taken the time necessary to learn to use them. In forming your business, there is wisdom in going slow.

If its success you seek, then first seek the advice of analysts whose record of success has been proven over time, that they are willing to ask 100 questions even if you're only looking for one answer. Business analysis, means taking time. It means engaging in silent thought. It means, searching for that key piece of data that "can't be found". And then finding it.

"A business analyst is a person who makes changes in a company by identifying needs and recommending solutions that are valuable to stakeholders"

A business analyst is a person who makes changes in a company by identifying needs and recommending solutions that are valuable to stakeholders.

But in order to make these changes it is necessary to have something which you know you can rely on. In this sense, business intelligence can often come to the aid of data and other statistical tools. We all know that in order to get the most out of any tool, you must use it properly. Pliers can be used to hammer a nail; however, it will always be far more effective to just use a hammer.

GUEST COLUMNIST



RAKESH CHABLANI
MANAGING DIRECTOR
OF DIGITAL, BETFRED

At a time when affiliate sites are increasingly competitive in driving site traffic and delivering quality players to the operators, entertaining content can be the difference between having a good summer and a spectacular one according to Chablani

Sports betting is big business. Of course, that is of no surprise to anyone reading this, but with the legal gambling industry set to be worth up to £625bn worldwide this year and the highly anticipated PASPA repeal in America, it is safe to say that the industry is poised for continued global growth.

That is certainly good news for sportsbook operators and affiliates; and with the summer of sport we are currently enjoying, there are plenty of opportunities to be had.

The World Cup, for instance, has sparked a flurry of betting at unprecedented levels with £2.5bn expected wagering during the competition in the UK alone. That figure is up more than double from the £1bn gambled during the 2014 edition of the tournament in Brazil.

There were big races to look forward to during the flat racing season as fans wagered on the Grand National and Cheltenham. With Wimbledon arguably the most prestigious sporting event in the world, there are plenty of opportunities for sportsbook affiliates. Away from the traditional betting events, the Tour de France took on added interest after Chris Froome was cleared of any wrongdoing by the UCI, while the British Grand Prix is always a popular event.

I frequently get asked how affiliates capitalise on the wave of high profile events. As Bill Gates famously declared in 1996 (the same year England were gearing up for the European Championships on home soil) 'content is king' and that remains as true today as it was then. The key to any successful affiliate sportsbook site is eye-catching visuals, a reader-friendly layout and unique content.

Writing tipping articles and promoting them well through social media is a great place to start, but there are other ways affiliates can capitalise this

summer. Firstly, rather than just doing outright tipping – for example: 'we are backing Germany to beat Sweden 2-1' – you could talk about the wealth of betting markets that have been opened during the tournament.

Since football is the primary driver of players this summer, highlighting markets such as 'Harry Kane to have 2+ shots on target' in a specific game will often appeal more to the punter than the outright result market, as there feels to be more value there. The same goes for other markets such as booking points and match corners. Highlighting markets like these not only creates fresh, unique content for your site but it also gets players through the door, thanks to the perceived value on offer.

The same can be said for the combinations that can be made up during the same football match. Each sportsbook should put their own spin on it with a name that is catchy and easy to hashtag. For example, Betfred uses #PickYourPunt which has become a popular and easily searchable hashtag. Usually made up of several outcomes within a single game such as the first goal scorer, number of cards, number of corners and correct score, they are attractive to punters and gives your brand some flair.

With sportsbooks offering markets like this, players feel that they are in control and there is a notion of individuality with this kind of bet, which are becoming increasingly popular. While some sites still ask for individuals to tweet them their preferences, we decided that Betfred will deliver a price instantly, so you can create a bet and host it on your site as a means of driving traffic.

Away from the World Cup, the summer is ripe for cross-sport bets. Patriotic punters, for example, may wish to get behind England to win the World Cup, Johanna Konta to win Wimbledon and Lewis Hamilton to triumph at Silverstone. This kind of bet appeals to people who may not typically be interested in sports betting, but they look at it as a show of support to their country.

Finally, one thing that affiliates can do for success this summer is to generate cross product interest. Some operators are offering football-themed casino games to compliment the summer of soccer, and they have seen additional conversion by promoting related offers onsite. There is nothing to stop affiliates from doing well by promoting sportsbook, whether that be the World Cup, the Tour de France or Wimbledon.

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