



WEEK 46

FRIDAY 16 NOV 2018

FOBT CUT MOVED FORWARD

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THIS WEEK

- **Penn National and VICI Properties pick up Jack Entertainment casino**
 - **Mr Green CEO exclusive**
 - **NBA signs European betting partner**
 - **Bet365 and Empire Resorts agree sports betting deal**
 - **Extensive SiGMA preview**
- GUEST COLUMNISTS:**
- **David Little, Co-Founder, Lightning Box Games**
 - **Sophie Morris, PR & Communications Manager, Ganapati**



The reduction in maximum stakes on fixed-odds betting terminals (FOBTs) in the UK has been brought forward to April 2019.

Chancellor of the Exchequer Philip Hammond initially confirmed in the 2019 Budget announcement that the maximum stake would be reduced from £100 to £2 in October 2019.

However, Jeremy Wright, Secretary of State for Digital, Culture, Media and Sport, said in a statement: "The government has been clear that protecting vulnerable people is the prime concern, but that as a responsible government it is also right to take the needs of those employed by the gambling industry into account and provide time for an orderly transition. "Parliament has, however, been clear that they want this change to be made sooner. The government has listened and will now implement the reduction in April 2019."

The planned increase in remote gaming duty, from 15% to 21%, has also been brought forward to April to offset the lost tax revenue from FOBTs.

Prime Minister Theresa May was reportedly facing a flurry of resignations if she did not accelerate the plans to April.

Tracey Crouch resigned from her position as Sports Minister on 2 November after being heavily involved with the process to have the maximum stake reduced.

A total of 12 junior government ministers were reported to have written to Chief Whip Julian Smith, warning they will join a growing rebellion.

As many as 50 Conservative MPs were said to be ready to join the rebellion, leaving the government facing the prospect of suffering defeat on its own Budget bill, the first time this has happened since 1978. ▶



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THIS WEEK IN NUMBERS

SEK16.8bn

Sweden's gross gaming revenue for the first three quarters of the year (\$1.8bn)



118

Number of suspects detained by Malaysian police in a raid on an international gambling den



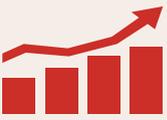
\$12m

The amount analysts say Rhode Island could lose due to a delay in the launch of sports betting



\$487.3m

Eldorado Resorts' Q3 revenue results, an increase of 3% year-on-year



RM3.3m

Monthly profit made by an illegal casino promotion operation in Kuala Lumpur (\$790,000)



Jacob Rees-Mogg, Conservative MP for North East Somerset, was said to be part of the group, as well as UK Foreign Secretary Boris Johnson.

Johnson previously campaigned against FOBTs in 2015, with the former Mayor of London saying: "They can be dangerously addictive, their promise of whopping wins only gives false hope and they prey on the vulnerable within society."

Crouch posted a letter on Twitter welcoming the decision to move the FOBT policy. As part of her letter, she declared "common sense has prevailed."

When quitting as Sports Minister, she retained her position as MP for Chatham and Aylesford and then added her name to the amendment, increasing the pressure on the Treasury to revert to the earlier date.

Reacting to the cut being brought forward, Matt Kaufman, Consultant at Eilers & Krejcik Gaming, told *Gambling Insider*: "The UK government has shown that it isn't concerned with allowing time for businesses to adjust to this change, which is certainly discouraging for the industry."

"The adjustment to the timing may be reasonably more disruptive than it would have been with the original schedule, including in ways that should concern the government like the potential for lost jobs."

Gambling consultant Steve Donoughue also spoke to *Gambling Insider*, saying: "The gambling industry needs to wake up to the fact that all it needs is some Trumpian campaign group to convince a few MPs that sector X or device Y is supposedly causing problem gambling and it won't be long before they get a thorough kicking."

"The government's cave in on bringing the date of the reduction of FOBT stakes from October 2019 to April 2019 is now the third in a row. It was originally set at April 2020 by the Treasury, to give both the betting and racing industries time to acclimatise to what will undoubtedly lead to a loss of 50% of betting shops and an almost similar amount of horserace betting levy."

"This third cave-in shows when there is no government majority they need everyone's support for their Brexit plans, and the Department for Digital, Culture, Media and Sport is now looking like a fully paid-up member of the anti-gambling brigade."

The timing of the latest FOBT disagreement has been inconvenient for May, as the Prime Minister was said to have agreed a Brexit deal in principal on Tuesday.

JACK ENTERTAINMENT AGREES \$1BN SALE OF GREEKTOWN CASINO

Jack Entertainment has agreed to sell Greektown Casino-Hotel for \$1bn cash to Penn National Gaming and VICI Properties, pending regulatory approval.

Penn National will acquire the operating assets of Greektown for approximately \$300m, while VICI Properties will obtain the land and real-estate assets of Greektown for around \$700m.

Caesars Entertainment, which also owns the Harrah's and Bally's casinos and the Planet Hollywood chain, had previously been rumoured to be keen on purchasing Jack Entertainment casinos.

VICI was formed in 2017 as a spin-off from Caesars Entertainment Operating Company.

Matt Cullen, CEO of Jack Entertainment, said: "After investing hundreds of millions of dollars of capital into redesigning and remodelling the property, Greektown Casino-Hotel is positioned for further future success."

"We are confident Penn National is the ideal steward to take Greektown to the next level of growth. We chose to sell to Penn National, in large part, due to its strong culture and the quality of its leadership and team. They are a professional operator that Greektown team members will enjoy working with as they continue to deliver excellent service to our guests."

Jack Entertainment will work alongside Penn National to ensure all guests and team members have a swift changeover once the transaction has been completed.

Cullen said: "During the transition, the property will remain open for business as usual. At closing, Greektown team members will transition with compensation and benefit packages at least as favourable as they currently enjoy."

The sale is expected to complete at some point in 2019.



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\$3.1m

The net loss Golden Entertainment posted for Q3



16

November, the date from which DraftKings will accept bets at its first land-based sportsbook

53%

The percentage of voters who would be in favour of sports betting in Maryland, according to a Washington Post – University of Maryland poll

MR GREEN CEO: INDUSTRY HAS ITSELF TO BLAME

Mr Green Ltd CEO Jesper Kärbrink believes the gambling industry needs to “keep the balance” with advertising – and only has itself to blame for current criticism.

Gambling advertising has received a wide array of opposition in recent months, with the Italian coalition government declaring a total ban (effective from 1 January 2019) and Australia prohibiting gambling adverts during live sport.

Politicians in both the UK and Spain have called for similar action and Kärbrink feels operators cannot be surprised if people are “annoyed.”

Excessive television advertising has had a “polluting” effect, Kärbrink believes, and a focus on free spins is not a wise approach in his eyes.

He told *Gambling Insider* in an exclusive interview: “The industry has itself to blame to some extent. We have been polluting TV channels with the same message all the time. Deposit here and get 500 free spins, etc. Finally, it will hit back.”

“There are a lot of people annoyed with gambling advertising. Gaming is an entertainment product and a lot of people are consuming it and we have to make sure we do what we can to keep the balance.”

In keeping the balance, the Mr Green Ltd CEO acknowledges the industry needs to diversify from methods which can easily come across as “aggressive” and “greedy.”

Kärbrink explained: “There are few other industries where people have so many opinions. I think we as an industry have a lot to blame ourselves for; being too aggressive and having a business model of buying new customers all the time. It’s not sustainable in the long term and we come across as greedy and loud.”

The full interview with Kärbrink will appear in *Gambling Insider's* Malta Focus magazine. Register here for free access.



THE WEEK IN QUOTES

"The measures are very severe for online casinos. They can only advertise on their own website. To me, advertising on your own website is almost not advertising. I'm puzzled about that."

Philippe Vlaeminck, Belgian gaming expert and Pharumlegal partner on advertising regulation in Belgium

"They have simply donned the judge's robe, cracked the gavel, and unilaterally determined Mr Wynn has failed to sustain his burden of establishing that any privilege applies to the unknown universe of documents acquired during the Mass Gaming investigation."

Statement from Steve Wynn's lawsuit filed against Wynn Resorts and Massachusetts Gaming Commission

"I want consumers in Britain to be able to enjoy the fairest and safest gambling in the world and to achieve my aims I need your support. I need you to work together to make sure you are the best - the fairest, safest - gambling operators in the world."

Gambling Commission CEO Neil McArthur on protecting consumers

NBA SIGNS FIRST EUROPEAN BETTING PARTNER

The NBA has announced its first ever European betting partner, signing a multi-year agreement with Française des Jeux (FDJ).

FDJ operates France's national lottery and its partnership with the NBA will be promoted in more than 27,000 retail locations.

The deal will also be of huge benefit to ParionsSport, the operator's gaming brand, as North American sport makes further strides to engage with the global gambling industry.

FDJ will use official NBA data and branding across ParionsSport's land-based and digital offerings.

Head of Gaming Operations for FDJ, Richard Courtois, said: "Partnering with the NBA, the most prestigious basketball league in the world, will allow ParionsSport to get even closer to the action and offer a more refined gaming experience for gamers, enabling us to reach yet more fans."

"Basketball is one of the most popular sports globally, and as a result of this partnership with the NBA, it will become even more popular and inspirational

for our customers."

NBA EME Vice President, Global Partnerships, Vandana Balachandar, added: "We are excited to partner with Française des Jeux, the market leader in sports betting in France.

"This collaboration will result in the best possible gaming and entertainment experience for consumers through the use of accurate, official, real-time NBA data, and demonstrates our collective efforts to maintain the integrity of our games."

Caesars Entertainment and MGM Resorts International have also signed gaming partnerships with the NBA in recent months.

In August, MGM Resorts signed a similar partnership to FDJ – making history as the first of its kind – while Caesars created headlines as the first gaming-entertainment company to sign a deal with both an NBA and NHL team.

Harris Blitzer Sports & Entertainment, owner of the Philadelphia 76ers and New Jersey Devils, announced a multi-year partnership with Caesars Entertainment in October.





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THIS WEEK'S WINNERS AND LOSERS

WINNERS

AGS– The supplier recorded a record breaking Q3, rising 34% year-on-year to \$75.5m

Kambi– The supplier will enter its second US state, Pennsylvania, in a deal to provide Greenwood Gaming with its sports betting platform and managed services

MGM & GVC– The joint venture between MGM Resorts International and GVC Holdings, MGM GVC Interactive, has announced Sportradar as its exclusive supplier of sports betting data

Macau Casinos – Typhoon Mangkhut is reported to have cost the island's gambling industry MOP 960m (\$119m) when it forced operations to close in September

Ladbrokes– The operator is set to terminate its on-course bookmaking activity in Ireland as a result of the doubling of betting tax in the country to 2%

LOSERS

BET365 TO ENTER NY SPORTS BETTING WITH EMPIRE

Empire Sports Inc. and Bet365 will form a strategic alliance to develop and offer sports betting and online gaming at Resorts World Catskills in New York.

Bet365, the world's largest online bookmaker, has entered a 20-year agreement with Empire to develop a physical and online sportsbook at the resort, if and when permitted by applicable law.

An affiliate of Bet365 will acquire up to \$50m of Empire common stock at a price of \$20 per share in two tranches, becoming Empire's second-largest stockholder, as part of the agreement. Kien Huat Realty III, Empire's largest stockholder, has committed to purchase up to \$126m of convertible preferred stock, with a conversion price of \$20 per share.

The agreement will see the companies equally share profits, once Bet365 has recouped its start-up and other costs.

Resorts World Catskills is one of four casinos in New York State currently

authorised to offer retail sports betting, pending the promulgation of regulations.

Manny Pearlman, Executive Chairman of Empire Resorts, said: "Joining forces with Bet365 positions Empire and our flagship Resorts World Catskills to lead a potentially enormous new market.

"Bet365's global expertise in effectively developing and executing world-class sportsbooks strongly complements Empire's leadership in commercial casino operations in New York."

Simon Betteley, President of Hillside, a Bet365 affiliate, said: "This landmark agreement, which combines Empire's gaming operating skill with our expertise in providing best-in-class online sports betting, allows Bet365 to tap into what we believe will be one of the most significant online and sportsbook markets in the US."

This follows Bet365's deal with fellow operator Hard Rock for sports betting at its new Atlantic City casino.

INDY FALLS

Indiana gaming revenue declined 1.93% in October.

Pinnacle's Ameristar in Northern Indiana, which grew 7.94%, once again benefitted from the recent allocation of high-limit slots and tables to a dockside facility near the riverboat casino.

Pinnacle's combined properties grew strong and led the state in terms of year-over-year revenue growth for the eighth straight month.

Pinnacle was acquired by Penn National halfway through the month.

MARKET/PROPERTY	REVENUE (M)	Y-O-Y(%) CHANGE
NORTHERN INDIANA - CHICAGOLAND:		
Ameristar (PNK)	\$16.8	+7.94
Majestic Star	\$9.913	+3.32
Horseshoe (CZR)	\$32.266	-2.56
Blue Chip (BYD)	\$11.306	-3.56
Chicagoland Total	\$70.285	+0.41
CENTRAL INDIANA - INDIANAPOLIS:		
Hoosier Park (CZR)	\$15.474	+2.62
Indiana Grand (CZR)	\$16.484	-7.63
Indianapolis Total	\$31.958	-2.93

MARKET/PROPERTY	REVENUE (M)	Y-O-Y(%) CHANGE
SOUTHEAST INDIANA - CININNATI:		
Belterra (PNK)	\$8.735	+8.56
Rising Star (FLL)	\$3.646	-0.77
Hollywood (PENN)	\$11.672	-8.90
Southeast Indiana Total	\$24.053	-1.95
OHIO PROPERTIES:		
JACK Cincinnati (JACK)	\$16.251	+3.79
Belterra Park (PNK)	\$6.659	-0.01
Ohio Property Total	\$22.910	+2.66
Cincinnati total	\$46.963	+0.24
LOUISVILLE - SOUTHWEST INDIANA:		
French Lick	\$7.073	+3.78
Tropicana (TPCA)	\$10.356	-2.86
Horseshoe (CZR)	\$17.403	-10.19
Louisville - Southwest total	\$34.831	-5.48
Indiana Total	\$161.1265	-1.93



infinite possibilities

SIGMA 2018: PRE-SHOW Q & A

Erkki Nikunen, CMO & Partner, Finnplay



will have the possibility to network with our partners and providers at the event.

How big has SiGMA become on the calendar of a gambling company?

SiGMA is becoming a more important event and it has now increased from a two-day to three-days now, so it is important for Finnplay to have a presence at SiGMA. We now rank it as something we go to every year, as it comes near the end of the year as brands and operators consider their development road-map for the forthcoming 12 months.

One of the great things about SiGMA is, of course, the location. Malta is the hub in Europe for online gaming; it is also quite easy to combine other activities around the exhibition. So, at least for

What are you most looking forward to about SiGMA in Malta this year?

Finnplay has had another strong year of growth across multiple markets and we are looking forward to demonstrating this at SiGMA,

presenting new products and new features of our platform to potential and existing customers. We also have many new people who have joined our company this year and, as we expand our business, they

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Finnplay, the importance of SiGMA is growing year to year.

Are there any particular events you are looking forward to attending?

We have so many people from Finnplay coming to SiGMA this year, so we have people pretty much going to all the events possible. But certainly the conferences regarding regulatory issues, compliance, payments and careers are currently striking very close to the heart, due to the constantly developing regulated markets across Europe.

Are there any products in particular Finnplay is excited about showcasing at SiGMA?

Yes, firstly, we want to showcase our platform, which is now also compliant with Swedish regulation. Secondly, Finnplay is the only platform provider in the market that has integrated all three current providers for the instant KYC and "no account creation" registration feature which is growing

in popularity with today's players.

The feature basically means the player does not need to separately create an account, instead making a direct deposit, and the KYC and account creation is done automatically over the Bank ID transaction. This means we can offer our customers targeting Sweden, Finland and Germany an all-encompassing solution with providers like Zimpler, Trustly and Entercash. It is quite an extraordinary possibility for Finnplay to have been able to offer

those options for our customers as the first provider in the market with no account creation functionality.

The solution provided is doing extremely well in the markets it is available in at the moment and is rapidly becoming a gold standard in the market. So it also gives smaller operators the possibility to enter the race and offer a solution that can compete equally with the biggest companies. Innovation is a wonderful way of creating competitiveness for newcomers.

"One of the great things about SiGMA is the location. Malta is the hub in Europe for online gaming; it is also quite easy to combine other activities around the exhibition"

SIGMA 2018: PRE-SHOW COLUMN

Valentyn Kyrylenko, VP of Business Development, BetInvest



This year, we will be exhibiting at SiGMA for the very first time and we are extremely excited to be taking part in this event. The annual summit for online gaming, which will be held in Malta for its fifth year, is one of the biggest events in the industry. We hope to find new friends and partners there and to make the most of our time at SiGMA.

Attending exhibitions is important for us as we strive to achieve our goals to grow our company's network and enhance our ability to set technological trends within different markets. Nineteen years of experience have enabled us to create first-rate IT products and services and to make them available around the world. We are always overcoming new challenges and seizing new opportunities.

SiGMA will be our fourth European exhibition this year. We are especially excited to have the opportunity to meet some of the top people in the industry, to showcase our products and to discuss the main challenges and global issues in online

gaming. In our industry, it is vital that we always stay up to date with international developments. Events like this are a perfect platform to share knowledge, innovations and support, and we believe they enable us to see things from other perspectives, which can result in new opportunities. We also benefit from the advice of our experienced peers, which enables us to further improve our products and skills.

As we are an international sports betting company, we have one of the largest betting pools in the industry. We consider our competencies to be well reflected by our sportsbook products – especially since our premium sportsbook content can be tailored to the customers' needs to fully meet their demands. We will be taking our main products to Malta: our reliable sportsbook and fast data feed.

As well as this, we will be offering simple but profitable in-house products such as lottery, keno and roulette.

We have many developments to share

with you at SiGMA 2018, as we are always making innovative changes to improve both our business processes and our CRM, ICMS and risk management tools.

SiGMA is an event of great importance and authority for the whole industry, so this is one of the best places to bring both gambling providers and operators together. It is a fantastic event for business communication, where participants can have fun and learn at the same time. We look forward to networking and listening to leading industry speakers during what are sure to be interesting conferences and workshops. You can find us at stand B46, where you will be able to test our products and services. We are eager to meet you!

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SIGMA 2018: PRE-SHOW Q & A

Melissa Summerfield, Chief Commercial Officer, Pragmatic Play

What are you most looking forward to about this year's SiGMA?

SiGMA consistently lives up to its billing as the world's online gaming village, and provides an excellent opportunity for forward-thinking providers to both showcase their products and forge powerful new business connections. The organisers always put on a great show, gathering the entire industry under one roof, and we are looking forward to capitalising on the opportunities that such a far-reaching event offers. I am especially looking forward to seeing people's reactions to our stand. We have truly pushed the boat out this year, taking the show's largest exhibition space and packing it with exciting features, none more so than our life-size Ronnie the Rhino mascot.

What are you hoping to get out of the show this year?

SiGMA provides us with the ideal opportunity to underline the quality and innovation we bring to the gaming industry, with a rapidly expanding product range

and global reach in regulated markets. We have every confidence SiGMA will allow us to better inform the industry on the depth and quality of our video slots, as well as the speed and flexibility with which we can deliver bespoke integrations. Using the show to push ahead with our strategy in maturing and emerging markets is our focus, and we can't wait to get started.

Why do you think the show's attendance and popularity has increased in recent years?

Content is king in the online gaming industry, and SiGMA represents the ideal show to become immersed in that content, with so many fantastic suppliers showcasing their products. The industry is continuing to develop apace, and SiGMA is the ideal place to discuss emerging trends.

Which products will you be exhibiting at this year's show?

We will be bringing our entire range of products to the industry, encapsulating the innovation and mobile-driven direction that makes our games stand out. We will



be hosting a slot tournament for our latest release, *Ancient Egypt Classic* on stand P154, with top prizes including an iPhone XS Max and a GoPro Hero7 camera. Staff from across the business will be on-hand to guide delegates through our expansive product range, which now includes bingo, scratchcards and a groundbreaking selection of live casino games on the back of our acquisition of Extreme Live Gaming from Novomatic Group.

What do you think will be the best networking opportunities at the show?

We are powering the event's official closing party, which will welcome more than 2,500 guests and provide all attendees with ample opportunities to review and cement new partnerships. We are delighted to be sponsoring what promises to be the show's highlight when it comes to networking.

SIGMA 2018: PRE-SHOW Q & A

Phil Nagy, CEO, Winning Poker Network



What are you most looking forward to about SiGMA this year?

More than anything, we want to demonstrate how crypto-currency can be beneficial for players, affiliates and operators. Back in 2015, when we first started taking bitcoin, it accounted for just 2% of our overall business.

In less than three years, it's now 60% of our overall business.

Players love it, because once they get past the initial learning curve, which is quite easy, they can deposit and withdraw their winnings much faster than traditional methods like credit cards, and it's also much less expensive.

Operators benefit substantially from this technology, as it increases deposit limits as the blockchain eliminates fraud, and it saves them money. Crypto-currency costs roughly 10% less than traditional methods, which adds a lot to the bottom line.

The more people within the

industry, the better it is for all of us. This is why I look forward to sharing this knowledge with others at SiGMA.

What are the opportunities for WPN at the show?

The show allows us to form new partnerships within a lot of various settings. This year, we're sponsoring three events, including the pre-registration drinks, the Networking Poker Tournament and the Affiliates Dinner.

We've got a huge opportunity to market many of the new products we're offering to delegates across the globe and forge mutually beneficial partnerships. Besides crypto-currency, we're now the only online poker network in the world that has both Six Plus Poker, and weekly \$1m tournaments catering to high stakes players. There's a lot to appeal to affiliates looking for a poker network that offers something completely different.

How essential is Malta and its gambling companies to WPN?

There are several solid gambling companies represented in Malta and there is much we can learn from each other. These conferences allow us the opportunity to meet face to face and discuss how the industry is evolving.

To stay successful, particularly in the online poker industry, you need to constantly evolve, while keeping in touch with what others do in the industry.

What do you hope to get out of the show?

We're looking forward to the opportunity for our team to talk to people who are as excited about crypto-currency as we are. Crypto now accounts for over half of our business and it's a great forum for us to speak on its merits and hear from others about their experiences with this evolving technology.

How important is the gaming industry to WPN and crypto-currency? How can SiGMA help grow this part of the business?

The gaming industry can offer what many other industries can't for crypto-currency, which is practical use and a place to spend it. With just a few clicks, you can be playing poker, betting on sports, or playing casino across a multitude of sites with any number of crypto-currencies. We are in the infancy of what we believe to be a revolution in how the world moves its money, and I'm excited that the gaming industry is at the forefront of it all.

“The gaming industry can offer what many other industries can't for crypto-currency, which is practical use and a place to spend it. With just a few clicks, you can be playing poker, betting on sports, or playing casino across a multitude of sites”

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SIGMA 2018: PRE-SHOW Q & A

Kate Romanenko, Chief Business Officer, Evoplay Entertainment

What are you most looking forward to about this year's SiGMA?

SiGMA is one of the hottest events on the industry calendar, and it's our first year in attendance, so of course we're absolutely delighted to be there.

With some of the world's most forward-thinking operators and providers housed under one roof, we're looking forward to unveiling some of our latest games, as well as meeting some of the industry's brightest sparks over an action-packed few days.

What are you hoping to get out of the show this year?

By attending SiGMA, we hope to give operators fresh new content and a point of differentiation from their competitors.

We unveiled the world's first 3D/VR slots game at ICE 2018 – Necromancer. SiGMA gives us another chance to showcase our latest products to the online gaming community and hopefully inspire our peers, customers and competitors to join us in harnessing the latest tech

developments out there.

Why do you think the show's attendance and popularity has increased in recent years?

Malta has established itself over recent years as Europe's de facto capital for online gaming and the latest gaming tech innovations. SiGMA is no doubt Malta's headline event – so much so that it's now become the place to be to discuss and showcase the latest in gaming trends and developments.

Which products will you be exhibiting at this year's show?

You'll find all of our headline slots on display at our stand (B211) where our team will be on hand to showcase each of their unique features.

We plan to unveil a couple of our latest games. This includes Syndicate, a thrilling journey into east coast America's underworld, and a slot game called ET, which uses two pieces of pioneering tech that work separately to make the gaming



experience lighter and faster than any slot has before. If you'd like to know more, you'll have to visit our stand for a personal demonstration from our CEO.

What do you think will be the best networking opportunities at the show?

Given that SiGMA has over 12,000 people slated to attend, networking opportunities will be ample everywhere. Our industry is a very social one, so the evening events, along with SiGMA's opening and closing parties, will be a great chance to renew old business relationships and create new ones.

Although of course if you want to see some of the industry's most innovative games and a further portfolio of slots, table, and instant games, everyone is welcome to come network with us while experiencing some of the most advanced gaming tech.



GUEST COLUMNIST

DAVID LITTLE

CO-FOUNDER, LIGHTNING
BOX GAMES

Little examines the flip-flopping fortunes of land-based and online gaming, recommending a multi-channel approach to cater for all needs

In the constant stream of slots gaming, delivering standout content can sometimes feel like an overwhelming task. At Lightning Box, our challenge is always to grab the attention of players, empowering both the land-based and online verticals with a true omni-channel solution which has the tech flexibility to match and scale with the strengths of each vertical.

Wind back the clock long enough, of course, and there was a time when internet gaming rated a distant second, such were technological restraint and sluggish download speeds; not to mention mobile phones which rivalled the size of kettles. With increasing rapidity, however, online surpassed land-based, due to hardware limitations and a "we've always done it this way" approach.

Now, though, thanks to server-based gaming, it seems the land-based movement is belatedly stealing back some of the ground it lost. Server-based gaming has certainly won plaudits in the high street and retail sectors, and is finally threatening to wrest back some control from slots in their eternal battle with table games.

It would be premature to say land-based gaming is leapfrogging online gaming in the technology race, but there are definitely areas in which online now lags behind its predecessor. Just look at 4K HDR screens and 4K content. This eponymous High Dynamic Range of interfaces has heightened the dynamic scope of visual fidelity and slots gameplay, while the towering cabinets in which these games are installed transport player immersion to another level.

Tall cabinets were trialled only a few years ago and the user experience was clunky and underwhelming. Yet to witness the disparity between these sleek, curved monitors and even the best smartphone interfaces is a night-and-day contrast. Take a stroll through the halls of these arched monoliths at ICE 2019 and your head will be turned. Land-based products are also commanding higher minimum bets than anyone on internet can demand, so the benefits are as obvious as their looming presence. ▶

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Accordingly, since the advent 4K HDR, game design must show its scalability to leverage the huge potential for a new era in land-based engagement. Designers now have a vast canvas with which to work, alongside a deeper palette for dazzling graphics and a layered soundscape.

It's a difference as stark as watching a movie on your mobile and going to the latest IMAX cinema. Suddenly hand-held devices and their smaller minimum bets won't seem so appealing by comparison.

Naturally, mutually beneficial co-existence should be the goal, and Lightning Box's multi-channel strategy is already providing that balance to retain the interest of our operator-partners' players, whichever medium they decide to play. We build our slots with both land-based and online play in mind and configure mechanics and themes based on what we know works across both channels. We also believe trialling new games in the retail space is a great way to know if they will be a success online, and any changes we might need to make before rolling them out to a digital audience.

Essentially, operators must partner with the right suppliers, who understand the differences between land-based and digital play, and how to fettle and finesse games to run seamlessly on both. Although

it's not just about content. Sure, as we discussed earlier, server-based gaming systems can connect any number of slot machines to a central server. And, content-wise, this allows operators to remotely deliver and regularly update slot content on land-based terminals.

However, it can also consolidate core data analytics in a cohesive fashion that drives scalable efficiencies, thereby improving the customer journey. Ultimately, an all-in-one solution tracking retention should combine data from all playing channels to create an intelligible player-maturation process which enjoys key strategic benefits in steering that lifecycle.

After all, the multi-channel player is the most prized demographic in the gaming industry. So multi-game terminals, for one, present an efficient path to broadening the slots offering. Elsewhere, by adopting the received industry wisdom of a mobile-first approach, many suppliers and operators are unwisely turning off desktop, choosing to neglect the website experience. Forcing customers to choose which device they play on is an absolute no-no in Lightning Box's book. Instead, wherever your players prefer setting their scene, accommodate their gaming needs. After all, focusing on one domain simply means you're overlooking another. Not to mention its accompanying revenue stream.



GUEST COLUMNIST

SOPHIE MORRIS
PR & COMMUNICATIONS
MANAGER, GANAPATI

Morris discusses the global influence of Japanese gaming

Japan is indisputably the country with the biggest impact on gaming culture around the world. Without Japan's input, the gaming industry as we know it would look quite different. While it may not have been the first country to produce either game software or hardware, Japan's contributions to game development far outweigh those of anywhere else.

Japan excels in two main areas, allowing it to lead the way in this respect – innovation and creativity.

When it comes to innovation and technology, Japan is hard to beat. An incredible number of life-changing technological inventions that we now take for granted originated in Japan, including none other than the battery, the calculator and digital cameras. With this in mind, it seems logical that the main technological advancements in gaming took place there, specifically in the period between 1970 and 1995, commonly referred to as the "Golden Age of Gaming."

Add the Japanese people's innate sense of creativity to the mix and the widespread popularity of Japan-made games makes complete sense. The Japanese philosophy of appreciating every little detail plays a big part in this. Whether it's the way moss is neatly arranged in a zen garden, the careful counting of syllables in haiku, or the meticulous way in which the cup is handled during a tea ceremony, beauty, precision and originality are inherent in everything the country produces.

This combination of both technical innovation and creative design has brought the world several gaming firsts, including the early video games and consoles from Japanese giants Nintendo and Sega, to name a few.

Another well-loved gaming genre which began in the east before spreading across the rest of the globe is that of amusement arcades. Hugely popular arcade games, which originated from the likes of Space Invaders and Pac-Man, went on to become world-famous console games, while the arcades themselves continued to take various forms over the years. Arcades are currently seen as outdated in the west but

still thrive in Japan, where they're known as "game centres." There are said to be around 14,000 of these throughout the country which are enjoyed by all ages.

Although Japan's influence on the global gaming scene is plain to see, it wasn't long before the west learnt from the best and developed its own style. Differences between Japanese and western games began to emerge as each came to more closely reflect their respective societies and cultures. An interesting example of this can be seen in the themes the most popular video games were based around. In terms of the US and Japan, a predominant difference was that of realism versus fantasy – whereas American gamers have historically enjoyed first-person shooting or war-related games, Japanese players tend not to have much interest in them.

In Japan, games will frequently feature sci-fi-esque, imaginary characters, as is common in anime. Countries such as the US and UK that are used to watching action-type shows on television wish to play games following similar themes.

The differing focuses of role-playing games echo the countries' cultural realities in a fascinating way – Japanese games often centre around achieving goals as a group. One example is civilians working together to defeat a humanity-threatening evil, just as Japan's real-life collectivist society very much would. Western players, on the other hand, are swayed by individual goals, even striving to become a hero in the process.

A Japanese-born aesthetic which doesn't look like it'll lose its global appeal any time soon is that of anime and manga. This distinctive style of cartoon, which instantly evokes Japan, is ever-popular in all types of games around the world – the revival of Pokémon in recent years being proof of this.

So, what does the future of Japanese gaming hold? In the same way arcade games evolved into consoles, then portable devices, it looks likely that the shift into online gaming will be made in the near future. Smartphone app games are currently the most popular form of gaming in Japan due to the constant production of unique concepts and the convenience of being able to play on long commutes.

With the incorporation of advanced technology, such as augmented reality and even holograms, already in the pipeline, whatever Japan produces next may well mark the setting of global standards all over again.

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