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WEEK 46

FRIDAY 15 NOV 2019

OPINION: MAX STAKE LIMITS ARE NOT A BLACK-AND-WHITE ISSUE

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WEEK 46

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THIS WEEK

- **SportPesa back in Kenya?**
- **Firms cautious on Japan**
- **Another decision goes against Global Gaming**
- **Q3: Flutter, Wynn & SG**
- **SiGMA preview: Altenar, Entertive, Evoplay Entertainment, Trustly, Pragmatic Play**

GUEST COLUMNISTS:

- **Nadia Adelstein, Head of Branding, Ganapati**
- **Mike Lally, Account Manager, Lightning Box**

OPINION: MAX STAKE LIMITS ARE NOT A BLACK-AND-WHITE ISSUE



Last week, the Gambling Related Harm All-Party Parliamentary Group (GRH APPG) called for stake and deposit limits to be set at £2 (\$2.60) for online slot games in its interim report.

The report was based on a six-month inquiry, in which the group found no justification for online slot games to have higher stake limits than their land-based counterparts, referring to the £2 limit to land-based fixed-odds betting terminals (FOBTs) introduced earlier this year.

While this might seem like a black-and-white issue for the GRH APPG, the introduction of stake limits is a controversial proposal for those within the industry.

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THIS WEEK IN NUMBERS

4



The number of pro sports franchises lobbying state lawmakers to legalise sports betting in Georgia

£10m

The amount the Betting Gaming Council will provide for a national education program for safer gambling (\$12.9m)



Shortly after the release of the report, I attended an industry event for the launch of Responsible Gambling Week and, as expected, it was the subject on everybody's lips.

During the first panel, John Hagan, Chairman of the Industry Group for Responsible Gambling, broached the issue with the participating executives, and the resulting opinion was unanimous.

They agreed online stake limits were an unsatisfactory tool for a complex issue, and that in blocking customers from placing their desired stakes, limits could push problem gamblers to unlicensed sites where they are not protected by the same checks and regulations.

Instead, the executives proposed further investment into affordability checks; as Wes Himes, CEO of the Remote Gambling Association, said: "We think affordability is a much more forensic and comprehensive way to approach the issue.

"We are testing various procedures based on our ability to identify customers in relation to their financial position, which will provide a much better case-by-case, person-by-person view on what is affordable for that player."

As Ben Wright, Head of Safer Gambling at Sky Bet, suggested, when there are more sophisticated methods of protection available such as "data-science, affordability or customer education," max stake limits seem like a "blunt tool."

While customer protection is rightfully at the forefront of everyone's minds, there is also a distinct lack of dialogue in regards to the effect on profitability when there are viable alternatives to limits.



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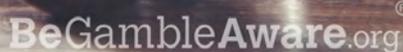


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31



The number of tribes in Oklahoma who believe, in conflict with the state government, their gaming compacts should automatically renew

\$50m



The amount the Missouri Gambling Commission estimates illegal slot machines and other gambling devices have diverted from the state's lottery

GVC Holdings, owner of Ladbrokes Coral, recently announced an 18% drop in its retail revenue for Q3 2019, blaming the decline on the reduction in maximum stakes for FOBTs.

The operator closed 41 of its betting shops during the period, taking the total closed as a result of the Triennial Review to 198. It is estimated 900 of GVC's betting shops will be closed over the next two years as a result of the maximum stake cut.

FOBT stake restrictions were a necessary precaution to an unfixable issue. Players do not need to offer verification, proof of affordability or betting history prior to playing land-based machines, but the limits have already led to the closure of hundreds of betting shops across the UK as they struggle for much-needed revenue. I'm certain if there were viable alternative solutions, as there are with online slots, they would have been pursued.

Profitability can often seem like a dirty word in the gambling industry, particularly when there is so much negative media surrounding it; but for cooperation between governing bodies and those within the industry, it is something that needs to be taken into account.

Limiting online stakes may be the simple solution for the GRH APPG; but it is a strategy that could not only cause further harm to those it is trying to protect, but also alienate those within the industry who are working hard on more effective solutions.

If the GRH APPG really wants to combat the issue of problem gambling in the UK, it needs to stop treating the issue as black-and-white and instead work towards a resolution which is beneficial to all involved.

This is something that, through increased affordability checks, responsible gambling tools and customer education, seems more than achievable.

\$5.7m



Total Iowa sportsbook revenue for the month of October, up \$4.9m from September

-4%

The month-on-month decrease in revenue for New York sportsbooks for the month of October, at \$2.2m



SPORTPESA RECONSIDERS KENYAN MARKET FOLLOWING TAX RULING

SportPesa CEO Ronald Karauri has said the operator will reconsider operations in Kenya following the overruling of a 20% tax on winnings.

The company recently halted operations in the country after the government imposed the 20% excise tax on all betting stakes, which according to SportPesa “rendered the sector commercially and economically unviable.”

Speaking with *Gambling Insider* at the time, Karauri explained how the tax made it unfeasible to remain in the market. He said: “We have seen changes every single year since the market’s inception.

“There was a lot of confusion surrounding the withholding tax on winnings and how it was being calculated.

“Then finally we have this excise tax which comes about from a basic misunderstanding of how our industry

works. This is expected to be a 20% tax on the amount staked. The fact we already have a tax on winnings means the business model completely collapses.”

At a recent hearing, the Kenyan Tax Appeals Tribunal overturned the excise tax, ruling that “total winnings” as stipulated in the tax do not include the amounts originally staked by the bettor.

In a statement released to *Gambling Insider*, Karauri said: “Today’s ruling is a significant development for both SportPesa and the wider betting sector in Kenya, reversing previous government policy that had rendered the sector commercially and economically unviable.

“SportPesa will now reconsider the future of its operations in Kenya. We remain committed to working closely with all stakeholders in Kenya as we seek to renew our license and resume our operations in the near future.”



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THE WEEK IN QUOTES

"We're delighted to show our backing for Responsible Gambling Week. Gambling responsibly is key to our platform so raising awareness and triggering conversations on how to keep betting fun and safe is a huge priority of ours. We hope our support resonates with the wider public in promoting safe and responsible gambling."

Mike Bohan, Football Index Marketing Director, on the company's decision to remove its logo from Nottingham Forest football club's shirts last weekend, in support of Responsible Gambling Week

LAS VEGAS SANDS AND WYNN RESORTS EXPRESS CAUTION OVER JAPANESE CASINO MARKET

Las Vegas Sands Managing Director for Global Development, George Tanasijevich, has outlined plans for the operator's proposed integrated resort in Yokohama.

Speaking at a symposium held in the city, Tanasijevich said the resort should become an iconic part of the city skyline and a major contributor to Yokohama's economy.

He expressed a desire to emulate the success of the Marina Bay Sands resort in Singapore, while giving the potential Yokohama site its own distinct style, which "compliments and integrates with existing infrastructure."

Tanasijevich said: "I want to create entertainment not yet seen before. I want to make Yokohama a place I want to visit over and over again.

"I want a Japanese partner and to develop a business understanding of what is needed in the area. I

hope to be a welcome presence and enjoy growth along with Japanese business."

Earlier this year, Las Vegas Sands and Melco Resorts abandoned plans for casinos in Osaka after announcing a Yokohama-first stance.

It is safe to say Sands is being cautious with its approach to Japan, a strategy also now shared by Wynn Resorts.

Speaking to analysts during Wynn's Q3 earnings call, CEO Matt Maddox tempered expectations regarding Wynn's stake in the Japan IR race.

Maddox said: "We are going to pursue Japan with vigour, but we will not pursue it if it does not make financial sense. I still believe this is going to be a longer process than a lot of people are anticipating.

"We're going to be very disciplined in terms of how any structure is put together, what the costs are going to be and what the return profile is going to be."

"We try and look at things as a glass half full. Obviously, there is that talk of decline and whether younger audiences are keen on horseracing. But, for us, inevitably there will be up and downs; horseracing just needs a bit of innovation. All it takes is someone like Barry Hearn to take hold of it – look what he's done with darts and snooker."

Phil Bell, Commercial Director of Argyll Entertainment, speaks with Gambling Insider about the future of horseracing

"It's been an honour to serve the gaming industry as chairman of the AGA the past two years. I'm proud of the strides we've made to highlight gaming's role as an economic engine and mainstream form of entertainment. The future of the organisation and industry is bright with Trevor and Bill's leadership."

Tim Wilmott, former Chairman of the American Gaming Association, on stepping down from the role following the appointment of Aristocrat CEO Trevor Croker

GLOBAL GAMING APPEAL REJECTED IN SWEDISH LICENSE CASE

Global Gaming's appeal against the revocation of subsidiary SafeEnt's license has been rejected by the Administrative Court in Sweden.

The Swedish Gambling Authority revoked SafeEnt's operating license earlier this year after reporting "serious deficiencies" in business practices, including failings related to responsible gambling and anti-money laundering measures.

Speaking with *Gambling Insider* at the time, Global Gaming CEO Tobias Fagerlund called the decision "unlawful" and blamed the failings on a lack of clarity following the market's re-regulation in January.

He said: "The law was presented to the state congress less than six months before it was going to be enforced. We and a lot of others were trying to ask the authority and the policymakers themselves for clarification, but nothing really came out. We were not given detailed answers."

The Administrative Court has now rejected Global Gaming's appeal against the decision, to which Fagerlund has expressed his disappointment.

When asked for his reaction to the decision, Fagerlund told *Gambling Insider*: "We think our argument is good and relevant and we do not share the opinion of the court.

"Of course, the decision affects our short-term possibilities for doing business in Sweden under our own license. However, it is important for me to emphasise everything we do is based on our current situation and we are not taken by surprise by the outcome in the first court.

"We have long-term plans for any potential final outcome, even if we are convinced we have a good chance of being successful at the end of the legal process."

Since the revocation of SafeEnt's license, Global Gaming has partnered with Finnplay to continue operations in Sweden.



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STAND P4

THIS WEEK'S WINNERS AND LOSERS

WINNERS

Bragg Gaming - Q3 revenue was CDN \$10m (US\$7.6m), a rise of 30% year-on-year

DraftKings - Generated \$39.3m in handle in Indiana for October, after launching its online sportsbook in the state earlier that month

Sportradar - Announced a long-term extension to its sports data partnership with DraftKings

Genting Singapore - Generated revenue of \$596.1m for Q3, a drop of 7% year-on-year

Red Rock Resorts - Reported a net loss of \$26.6m for the three months ended 30 Sep, as a result of one-time charges

LOSERS

Q3 ROUND-UP: FLUTTER, WYNN, SCIENTIFIC GAMES & MORE

As Q3 trading reports continue to be published, revenue at Flutter Entertainment grew to £533m (\$685.9m) for the period, a 10% rise year-on-year.

The operator's sports betting revenue rose 11% to £417m while its gaming revenue was £116m, an 8% increase.

It reported a 6% drop in online sports betting revenue to £163m and an 11% rise in online gaming revenue to £84m.

Retail revenue declined 9% year-on-year for the operator. Its 5% retail sportsbook rise was offset by a 37% decline in fixed-odds betting terminals (FOBT) revenue.

In the US, Wynn Resorts said its operating revenue fell 3% year-on-year for Q3 2019, to \$1.65bn.

Flat revenue in Las Vegas and revenue of \$175.8m at Encore Boston Harbor were offset by decreases of 18% at both Wynn Palace and Wynn Macau, to \$598.2m and \$474.3m respectively.

Net loss attributable to Wynn was \$3.5m, compared to net income of \$156.1m for Q3 2018, primarily due to a fall in VIP table games win in Macau.

Despite a "difficult-to-navigate environment" in Europe, LeoVegas

revenue was €88.2m (\$97.6m) for Q3 2019, a rise of 12% year-on-year.

EBITDA was €12.7m, an increase of 41%, while operating profit was €6m, up 71%.

The operator saw a decrease of 4% for new depositing customers, at 135,019, and an increase of 12% for returning depositing customers, totalling 199,023.

On the supplier side, Scientific Games generated revenue of \$855m for Q3 2019, up 4% year-on-year.

Adjusted EBITDA was \$344m, an increase of 6%, while net income was \$18m, a significant increase from the \$352m loss in the prior year period.

The supplier's revenue for the year-to-date was \$2.48bn, an increase of 2% from 2018.

Meanwhile, AGS reported Q3 revenue of \$79.4m, a 5% year-on-year increase, with recurring Q3 revenue up 4% to \$52.5m.

The supplier sold its highest quarterly number of EGM units for Q3 (1,391), which was also a growth of 4%.

But AGS still declared a net loss of \$5.5m, down from net income of \$4.3m for Q3 2018, despite adjusted EBITDA rising 10% to \$36.8m.

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OH, INDY RISE

Indiana gaming revenue grew 1.15% year-on-year for October, aided by sports betting, which casino operators have said is driving additional visitation and table game play. Sports betting is not factored into the casino revenue total.

Caesars' Southern Indiana continued to be hurt by Churchill Downs' Derby City Gaming in Louisville, which continues to take market share.

Sports betting revenue grew 34.82% over September, aided by the launch of mobile betting during October.

Handle was more than two-and-a-half times September's handle.

Penn National's Ameristar led the state with \$5.026m in revenue on

\$46.169m in handle. DraftKings operates sports betting at the property.

The Majestic Star casinos and Full House's Rising Star have not launched sports betting yet.

Ohio gaming revenue grew for the sixth straight month, up 5.62% for October. Every property except Penn National's Hollywood Toledo grew results. The state would have grown 6.5% with Toledo factored out.

October marked the first month of Hard Rock's operations of Jack Cincinnati. The company closed on the acquisition of the operations mid-September, with VICI Properties buying the casino for \$558m.

The property will be rebranded as Hard Rock Cincinnati next spring.

PROPERTY/MARKET	REVENUE MILLION	% CHANGE
Northern Indiana - Chicagoland		
Majestic Star	\$10.612	+7.06
Blue Chip (BYD)	\$11.892	+5.19
Horseshoe (CZR)	\$33.770	+4.66
Ameristar (PENN)	\$16.105	-4.14
Chicagoland Total	\$72.380	+2.98
Southeast Indiana - Cincinnati		
Hollywood (PENN)	\$13.271	+13.71
Rising Star (FLL)	\$3.220	-11.69
Belterra (BYD)	\$7.442	-14.81
Southeast Indiana Total	\$23.933	-0.50
Central Indiana - Indianapolis		
Indiana Grand (CZR)	\$17.576	+6.62
Hoosier Park (CZR)	\$15.619	+0.94
Indianapolis Total	\$33.195	+3.87
Ohio Properties		
Jack Cincinnati (JACK)	\$16.887	+3.91
Belterra Park (BYD)	\$6.872	+3.20
Ohio Property Total	\$23.759	+3.70
* Cincinnati total	\$47.692	+1.55
Louisville - Southwest Indiana		
Derby City Gaming (CHDN)	\$8.866	+102.58
Tropicana (ERI)	\$10.614	+2.49
French Lick	\$6.872	-2.84
Southern Indiana (CZR)	\$15.987	-8.14
** Louisville - Southwest total	\$33.472	-3.90
Indiana Total	\$162.979	+1.15
Multiple Properties		
Penn National (PENN)	\$29.376	+3.18
Caesars (CZR)	\$82.952	+1.62
Boyd (BYD)	\$19.334	-3.53
* Cincinnati total includes Jack Cincinnati and Belterra Park in Ohio. ** Louisville - Southwest Indiana total includes Churchill Downs' Derby City Gaming in Kentucky.		

PROPERTY/MARKET	REVENUE MILLION	HANDLE
Sports Betting		
Ameristar (PENN)	\$5.026	\$46.169
Horseshoe Hammond (CZR)	\$1.715	\$10.680
Hollywood (PENN)	\$1.107	\$6.925
Hoosier Park (CZR)	\$1.054	\$6.159
Blue Chip (BYD)	\$903,326	\$6.927
French Lick	\$554,653	\$7.058
Indiana Grand	\$505,740	\$3.763
Tropicana (ERI)	\$367,766	\$1.963
Belterra (BYD)	\$154,112	\$812,130
Caesars Southern Indiana (CZR)	\$150,844	\$1.240
Total	\$11.539	\$91.697
Ohio		
Hollywood Dayton (PENN)	\$9.932	+14.26
Thistledown (JACK)	\$11.866	+13.92
Hollywood Mahoning Valley (PENN)	\$10.875	+10.52
Miami Valley Gaming (CHDN/Del North)	\$14.301	+9.31
Scioto Downs (ERI)	\$15.124	+9.07
Jack Cleveland (JACK)	\$16.745	+4.87
Jack Cincinnati (Hard Rock)	\$16.887	+3.91
Belterra Park (BYD)	\$6.872	+3.20
MGM Northfield Park (MGM)	\$21.350	+2.31
Hollywood Columbus (PENN)	\$18.428	+2.09
Hollywood Toledo (PENN)	\$16.041	-1.53
State total	\$158.419	+5.62
Cincinnati		
Jack Cincinnati (Hard Rock)	\$16.887	+3.91
Belterra Park (BYD)	\$6.872	+3.20
*Cincinnati total	\$23.759	+3.70
Cleveland		
Thistledown (JACK)	\$11.866	+13.92
Jack Cleveland (JACK)	\$16.745	+4.87
MGM Northfield Park (MGM)	\$21.350	+2.31
Cleveland total	\$49.960	+5.73
Multiple Properties		
Jack	\$28.611	+8.44
Penn	\$55.275	+4.54
*Includes Indiana properties in Southeast Indiana		



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CHANGING BY DEGREES

ANDREW FOSTER, HEAD OF BUSINESS DEVELOPMENT AT INTERACTIVE, SPEAKS WITH *GAMBLING INSIDER* ABOUT THE COMPANY'S RAPID DEVELOPMENT AND PROUDEST MOMENTS FOR 2019



Will you be attending this year's SiGMA yourself? What can we expect from Interactive's offering?

Definitely. It's the third year now we're going to be attending SiGMA and presenting a stand. I've attended all those years myself and this year we've got some new market material to showcase. We're going to be focusing a lot more on why we're bringing our product to market.

This year is also important for us because it marks 10 years that we've been involved in reactivating players for the online gaming industry. We'll be at stand B34 if anyone wants to drop by for the best coffee at SiGMA.

Living and working in Malta, how important do you think the Maltese online gaming community is for the industry?

The Maltese gaming industry is

very healthy and significant because of the brands and personalities living within the communities here. The best thing about it is if you're doing good work, word spreads quite quickly. People get to know about your company and what you're able to achieve.

What does your role entail as Head of Business Development at Interactive?

The role has changed slightly over the past few years. Originally I was taken on board to take the product to market. We spent a bit of time trying to get a team together, perfecting what the product is and planning how we would package it for the market. Now it's more driven around building a really good sales team that can actually go out and sell the product, then also getting

together a lot of key account managers who can look after the clients. A lot of focus is on building towards new strategies and new markets - for example looking towards the potential of the US.

How has the company developed in the three years you've been involved?

It's been crazy to be honest. I joined the company at the same time as our CTO. At the time, we used third party diallers and third-party solutions for basically everything we did. Over the last three years we developed our own dialler solution which caters only for online gaming and is built around being scalable.

The company has changed 180 degrees in the way we integrate; the way calls are made; and the possibility for us to alter the journey for the players that are in our systems. There's been a huge focus on tech, whereas before we were focused on getting more people in and optimising our results. Nowadays

our tech assists in driving better results together with the team.

What are some of the biggest challenges you faced with that shift in operations?

At the beginning, the biggest challenge was packaging the product right to get people to understand what we actually do. There's a tendency to think we are part of your normal CRM journey.

Operators tend to believe they are able to outsource their CRM to us and that's not the case. The key thing for us is that we work on the players operators had given up on, so it's a completely different segment. The biggest challenge for me was convincing operators these players still have a lot of value.

As 2019 draws to a close, what achievements are you most proud of?

We've extended our partnership with Kindred Group substantially and that's been really rewarding.

We've signed some other big operators such as Casumo. Having really strong performance results in the first month of our partnership is a great achievement.

Signing STS was another proud moment, and maintaining a loyal client base for 10 years, with the likes of Betsson Group, GiG and Aspire Global, is also something to be proud of.

After all those achievements in 2019, what is the target for next year?

We're looking at making our model even more scalable. We still feel we haven't scratched the surface in terms of getting all the top operators on board.

The next step will probably be around expanding into the US. It's a market we see as having very high potential and ideally we would like to expand there with one of our existing partners, or alternatively partner with one of the big operators in the US.



HOME OF GAMING EXCELLENCE

GamingMalta is an independent non-profit foundation set up by the Government of Malta and the Malta Gaming Authority (MGA). Tasked with the remit of promoting Malta as a center of excellence in the digital and remote gaming sector globally, it is also responsible for liaising with the local relevant authorities to improve Malta's attractiveness as a jurisdiction and enhance the ecosystem surrounding the gaming industry.

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MAKING GAMING ACCESSIBLE

ROMAN SADOVSKIY, PRODUCT OWNER AT EVOPLAY ENTERTAINMENT, SPEAKS WITH *GAMBLING INSIDER* ABOUT THE CREATIVE PROCESS AND HOW THE SUPPLIER PLANS TO MAKE GAMING ACCESSIBLE TO ALL



Firstly, how much are you looking forward to SIGMA this year?

This year will be my first SIGMA and I'm really looking forward to it as part of the Evoplay Entertainment team. We're going to be showcasing a few of our new games so I'm really excited for that. It's rare to have so many leading companies under one roof and I'm looking forward to exchanging experiences with other developers.

What can we expect from Evoplay Entertainment's offering at SIGMA this year that will make it stand out from the competition?

Our highlight will no doubt be our slot *Dungeon: Immortal Evil*. I think people are really going to enjoy this. The graphics and mechanics are great. The idea behind it was to merge the line between classic slots

and immersive gaming – taking the best from both worlds and putting it together for a completely new user experience. The game follows our hero through an ancient temple as he does battle with monsters and demons.

What would be a typical day for you within the design team?

I create a road-map for all our future games. I've always been passionate about exploring and learning game mechanics as well as their visual style – especially when it comes to understanding what works better and doesn't.

With that experience under my belt, I began developing new game concepts, designs and mechanics for our future games.

I am now responsible for providing the creative direction we take.

How do you attempt to stay on top of current trends in such a competitive market?

As a daily rule, I always read whatever I can. The world of online gaming isn't insular.

Influences from the outside world shape player preferences for the perfect gaming experience.

Movies, literature and art are all part of that and the influence of culture on our industry can never be understated. The same goes for gaming outside our industry.

Big gaming companies such as Ubisoft and Electronic Arts are particularly important to watch.

In terms of design, are younger players looking for something different now?

The future of slots is all about mobile. Today's generation wants flexibility and the chance to access games anywhere at any time.

The emergence of mobile in markets outside Europe, such as India, Africa

and LatAm, has a whole new level of dominance – having bypassed the desktop entirely as part of its tech jump and gone straight to mobile. We incorporate this into all our game design, ensuring games can be rotated with handheld devices.

In the future, would Evoplay Entertainment look at implementing VR?

We've already implemented VR into a couple of our slots, and it's proven very popular.

The new generation of players demand something new to give them the best gaming experience; 3D and VR can give them that and more – especially when it comes to the immersive experience of VR.

As the year draws to a close, what are some of Evoplay Entertainment's best achievements for 2019?

In my opinion, two of the coolest games we have created are Reign

of Dragons and Nuke World. These are really exciting 2D slots which have great graphics.

The good thing about these games is we've made sure everyone in the world who has a bad internet connection can play them by optimising every animation, model and graphic.

We also add the option HD mode on and off, so we can be sure users with a new smartphone model can enjoy our graphics without alienating the players with older models.

What is the focus for 2020?

Our focus is on accessible gameplay no matter where you are in the world. We'll be developing games to be optimised for both rotational aspects of mobile, enabling players to play with one hand.

We'll also be continuing to create slots that provide for an immersive experience with a story behind them. The rate of demand from a new generation of players is changing at a fascinating pace and we're excited to be coming up with creative ways to satisfy that demand.

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'CASH AND CARD ARE NOT FIT FOR PURPOSE'

SAMUEL BARRETT, DIRECTOR OF GAMING AT TRUSTLY, ARGUES CUSTOMERS SHOULD HAVE A CHOICE TO DEPOSIT FUNDS WHEN PLAYING IN CASINOS



You've been at Trustly for almost four years now. How has the gaming division developed at Trustly in that time?

When I joined four years ago, we were just starting to work outside our normal deposit and payout methods, with our KYC identification products. That basically pulls all the KYC information from the players' bank account at the time they log into their bank and deposit. We realised we could take this product and change the flow of the product. We've created what is known today as Pay N Play. Four years ago, we were a very Nordic-focused payment method, but we're now one of Europe's biggest payment methods. We now work with not just Swedish casinos, but other European casinos and locally-licensed sportsbooks. To be part of that journey has been an absolute whirlwind.

What are you hoping to get out of SiGMA this year?

SiGMA is a crucial event for us. It's bringing together all our key clients from all verticals. But most importantly, our Pay N Play product, which has sold well in the Nordics in the last few years, will be the focal point of discussions. We have an office here in Malta, where our gaming vertical is run, so it's on home turf of sorts, and it's the biggest event in gaming in Malta.

This year, we'll also be discussing our new product – Trustly Live. That is ultimately the first bank alternative payment method for the land-based casino industry.

Following the launch of Trustly Live, how long do you think it will be before the majority of casinos are looking at cashless options?

I think the industry is definitely moving



towards a more cashless set-up. The time of payment is when you actually convert somebody; not when someone registers.

Players can now walk onto a casino floor, scan a static QR code with your smartphone, and make a deposit directly from their bank via Trustly. To authenticate themselves, they then get sent a text message with a unique code, which they can use to redeem for chips at the cashier desk. Dealing with cash only is just not good for AML purposes.

There are limitations on how much people can pull out of their ATM and there's only so much they can pay on their card. There are certain surveillance procedures that need to be taken into consideration when cash is involved. Cash and card are just not fit for purpose.

Do players really want to go through the process of transferring funds, which isn't as simple as using a debit or credit card at a table, or just taking cash out at a casino?

We are trying to complement cash and not replace it. If you play on Betfair, for example, you're allowed to deposit via a variety of methods. There are cards, wallets and banks. Why does Betfair want all of them? It's the same reason why a retail casino would want different payment methods. The more choice you give, the more preference you catch and the more conversion you get.

If people haven't seen that choice before and they don't know about it, you can't really question if they would prefer to have it or not.

It just has to be the same both ways, as you can't play with cash and then cash out winnings through Trustly Live, as we don't know where that cash came from. What we can do is send card deposits back to the bank and the amount you win is a verified win. If you make a €1,000 (\$1,099) deposit and win €5,000, the winnings go in your bank, because we know the €4,000 won was within the establishment. The original amount goes back to card.



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COMPETING IN LIVE CASINO

LENA YASIR, PRAGMATIC PLAY'S VICE PRESIDENT, SPEAKS ABOUT HER GAMING INDUSTRY EXPERIENCE, THE SUPPLIER'S PLANS FOR SIGMA AND THE CHALLENGES OF THE LIVE CASINO MARKET



I understand you've been with Pragmatic Play for more than a year now. How would you say this compares with previous roles you've had in the gaming industry?

The previous 10 years in gaming have definitely given me an amazing foundation for this role. I started with online poker in Stockholm with Ogame, then I moved to Evolution Gaming. Basically, I was their first commercial contact on the island and that helped me grow my network and expand my live casino knowledge. Then just before joining Pragmatic Play, I joined Play'n Go and again my role there was to set up the Malta office on the island and be responsible for setting up a commercial team, a technical support team and an integrations team. This later led to adding compliance, marketing and development.

I definitely believe I have set a strong foundation for myself. In preparation for this current role, I gathered together all my different experiences so I could learn from the past and make sure I contribute the best from what I've learned over the years to Pragmatic Play.

Would you say that is one of the plus sides to Malta? In other words, that when you have a job in gaming in Malta, it can be quite difficult to leave the industry at times?

It's funny you say that, because it can be like that. Once you've entered the gaming industry, it sucks you in. It's such a high-paced industry. It changes all the time. It's an exciting industry and sometimes I feel like even though I've been in it for 10 years, it really doesn't feel like I have been in the industry that long. There's always

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new regulations, new markets, new competitors. There's such a huge gaming community in Malta. It's a gaming hub. It makes it even more exciting to just be in the gaming industry, because that and finance are the two biggest industries here.

What will be different at Pragmatic Play's SiGMA stand this year, in comparison with previous years?

This year is going to be very exciting for us, because of the introduction of our live casino portfolio. Also this year, we launched our gamification tool called Pragmatic Play Enhance. With new regulations in different markets, I think this be a huge differentiator for us. Enhance has already been rolled out and it has a variety of features, such as adding tournament promotions, prize drops, bonus rounds and what we call an in-play boost.

Having said that, it is also key suppliers don't lose focus on what made them successful in the first place.

While we feel gamification tools can

add a level of excitement to the game play, the focus has always been on the product the players are using. We will be showcasing our latest slot Aladdin and the Sorcerer at SiGMA, and we will be hosting a tournament which showcases all our best products. By no means are we narrowing our focus to just one vertical.

How challenging would you say it has been to make progress in a competitive live casino market?

Now live casino has evolved beyond a brick-and-mortar experience, the battle for differentiation between providers is being fought in innovation. We need to be innovative with new features such as in-game promotions. Instant win

elements and free bonuses are delivering a level of interactivity and engagement that's boosting the operators' bottom line.

But suppliers need to also pay close attention to feedback from their partners and tailor their products accordingly.

How would you see the live casino market developing in the next five years?

I think the instant pleasure aspect and the convenience of live casino makes for an appealing proposition to a mix of audiences; with technological advancements unlocking these experiences for mobile, the popularity of this vertical will only increase.

Once you've entered the gaming industry, it sucks you in. It's such a high-paced industry. It changes all the time.



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FROM THE EXHIBITORS: ALTENAR

DINOS STRANOMITIS, COO



Can you tell our readers a little bit about what Altentar does?

Altentar is predominantly a sports betting solution. We package everything in one and we have a fully managed sportsbook, including hosting, odds, risk management, trading and the software. It started as BetInAction in 2009 and evolved into Altentar in 2014. The reason we have had significant growth in the last few years is our mentality and the way we approach customers.

We try to be a bit flexible. What we promote is very basic things: our motto is stability meets flexibility. For us, stability is much more than just software that works 99.9% of the time; it's the whole concept behind it. We don't lose existing customers because we are flexible enough to listen to them – and that's where our stability stems from.

As a company, we are happy to discuss case-by-case if the whole solution is not necessary.

Some companies might have internal resources they would like to keep. This is why we are growing fast, I would say.

You've been at Altentar for a few years now. How would you describe your journey with the company?

One of my partners started in 2008 by creating the software. Initially, we tried to partner using separate entities. In 2014, we merged everything under one roof – so I am one of the Founders of Altentar. I would describe it as my home; it's not a job. It's not just an interesting project but part of my life. We developed the company from scratch with limited resources. It was difficult initially, due to the high competition. You need to be creative and go against the norm. We had to

be creative to satisfy customers and gain market share. We had to be there when others weren't.

I'll give you an example: one of the significant moments in Altenar's history came in Colombia.

Any normal company would never bother to discuss with someone in Colombia a product we don't have. But when we were approached by someone who was interested in football live scores, we spoke to him. Today, he is one of the Founders of Wplay, the leading operator in Colombia's regulated market. They are using our sportsbook and we're beating Kambi in that country.

So, out of nothing, without any business case, we've built a whole legacy. We listen to the customer and create solutions to problems; not a solution we impose on the market. This is how we created Altenar together.

What are your hopes for SiGMA?

SiGMA is an interesting thing – I call it thing because I'm not sure if it's an affiliate conference, exhibition or event. It's bizarre; but I'm using the word bizarre in a positive way. It started as a small gathering in a hotel room. But now, in terms of online business, it's challenging ICE London. We all know ICE: it's the best event of the year in gaming. But a big part of ICE is the land-based segment. If you take out Novomatic, MerkurGaming and land-based firms, you end up with SiGMA. That's how I see it.

It's very clever to hold it in Malta. Like it or not, Malta is a gaming hub; it was pretty obvious something was missing in Malta. They filled this gap with great success, I would say. For us, it is the most successful event of the year; we have great expectations, mainly because we've seen results in the last three years. We will sponsor the gate this year

and we consider this a great opportunity.

What are your aims for 2020 and beyond?

We have tried to acquire as many B2B licenses as possible. We have obtained a Gambling Commission license; no matter the criticism, for me the UK is the centre of the gambling world. If you really want to be successful, you have to prove yourself in the UK at some point in time. We have also obtained a Malta B2B license, Romania, Spain, Sweden and in Italy we have connected with the local authority.

So we are moving more and more to regulated environments. Regulated environments require resources, compliance and many things that aren't just about the technical or operational approach. There are many overhead costs but it creates an asset for the company. So our future plans are to capitalise on this plan and focus on regulated markets.

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GUEST COLUMNIST



MIKE LALLY

ACCOUNT DIRECTOR,
LIGHTNING BOX GAMES

Lally discusses the risks and rewards of innovation

During a recent customer tour of the Lightning Box studio, the conversation often turned to innovation. What's new and what will be the next big thing?

There is certainly a desire among operators for something that looks and feels different to the traditional five-reel slot. That format has been the workhorse of the video slot industry for a long time now, with three or four rows down making up the standard presentation. Where innovation has been introduced, it has been within a game's mathematics or the features, rather than the design of the base game.

In more recent times however, studios have begun experimenting with the structure of the reels, introducing wonderful new shapes and sizes, including Cluster pays, Megaways, Colossal reels and the like. The good news is players seem to be more and more accepting of these types of games and are not put off by change.

Innovation can also be seen in the traditionally more conservative land-based casino market. Betting shops tend to still rely heavily on the standard five-reel slot; but casinos in Las Vegas are now heaving with ever-increasing screen sizes, with new games on those cabinets having had to be created to make use of that extra real estate.

A lot of the changes in online slots have probably stemmed from this new wave of activity – and I believe this is great news for the industry.

Of course, it may also be due to a millennial effect, with players brought up on console games being more open to an adventure or to try something new. What is clear, in any case, is players play for the thrill of the ride, such as the ups and downs and the volatility of the slot.

If game design companies can achieve that with more reels, more positions and more ways to win, they seem to be onto a winner themselves.

At the risk of being a party-pooper however, it is worth noting innovation in online gaming will always have some constraints. Upwards of 80% of online video slot play is now in portrait mode on a phone. Screen sizes appear to have plateaued, so trying to squeeze more symbols onto a screen will surely have its limits.

It is, of course, a very risky proposition to come up with a completely new and innovative game. The costs

of building, testing, marketing and launching any game are high and even more so for something that has never been done before.

There is no proven way to know if a game will succeed once it is out there. As a result, credit must be given to the studios putting it on the line with the next whacky idea because it is them taking the risk.

One thing that should always be considered, no matter how exciting the innovation, is new games need to be logical to the player, whether they're a hardcore fan or new to the format.

With that in mind, we have a saying at Lightning Box: keep 70% of the player experience the same and make it 30% new. That means keeping the win metre in the same spot, where players expect it, and make the buttons perform the same way from game to game.

If you change too much, there is the potential to confuse the player, who will move to a new game if they can't easily figure out what is going on. In other words, being too innovative could potentially have an undesired affect.

Whether you are blazing a trail on the innovation curve, or happy producing traditional, old-school classics, an enthralling and exciting experience needs to be at the core and essence of any game.

“If you change too much, there is the potential to confuse the player, who will move to a new game if they can't easily figure out what is going on. In other words, being too innovative could potentially have an undesired affect”

Whatever your particular flavour of excitement is, be it multi-screening, bamboozling ways to win, achievements, tournament, or a simple three-reel, one-line slot, the industry is a broad church. It must cater for many different tastes and proclivities. The job of studios like ours is to ensure players – and our operator partners – enjoy their particular flavour.

GUEST COLUMNIST



NADIA ADELSTEIN

HEAD OF BRANDING,
GANAPATI PLC

Adelstein discusses the importance of storytelling in slots

The popularity of online slot games has grown exponentially in the last decade or so and isn't showing any signs of slowing down. The internet has enabled these games to be accessible from all over the world and, as technology advances, so does the quality of gameplay. But what makes a great online slot game?

Whereas the traditional approach of slots incorporates the simple lining up of three berries or lemons on three reels, in the online world these standard slot designs just don't cut it. Players need emotion, a storyline and, more often than not, a challenge.

The art of storytelling

Great variation in storytelling is often the point of attraction for the player. Developers have recognised this as an opportunity and games have evolved as a result. Tying storylines to slot games or incorporating themes relevant in popular culture has proved to be a successful tactic for developers in recent years – from Love Island to the World Cup, slots have come along way from the classic three-reel approach.

Nonetheless, it is important to acknowledge some players may prefer to play the online version of a traditional slot game found in a brick-and-mortar casino. But in this day and age, coming up with fresh, creative ways for players to enjoy the gaming experience is crucial to keep up in the industry.

Symbols must have meaning

Previous forms of online slots were fairly simple, with meaningless symbols on the reels. As such, they'd follow a simple basic format seen in real life casinos. However, with the growing numbers of different – but almost identical – slot games, it's not easy for each game to stand out from the crowd. Today, to attract attention as a unique slot game in the highly competitive online casino world, symbols must mean something. Developers now spend longer and invest even more resources into developing their games, to meet the standards modern-day players have come to expect. Content should be engaging – after all, retention is just as important as attraction.

Creating FOMO

There's now a focus on the ambience and sound of the game.

With a narrative in place and the fear of missing out, the player is encouraged to continue playing to find out what's next. For example, having a game in an environment of a historical battleground, alongside an emotive narrative telling the tale in video clip cutaways or bonus rounds, will absorb the player into the game. Incorporating dramatic music to underline the mood of the game, the player can be locked into a game for a period of time not wanting to miss out on what happens next in their gaming journey.

Other rules of engagement

There are many other ways and techniques to keep players engaged, even something as simple as thinking about how users prefer to hold their phone can play an unexpected but crucial factor in their gaming experience. This can be demonstrated by the development and implementation of portrait mode. Being able to switch back and forth from horizontal to vertical orientation gives players the ability to absorb the art and animations of a game in a different way, as well as the freedom to decide what works best for them. Tailoring gameplay to players' preferred methods is essential for maintaining engagement and is therefore something gaming developers should put serious effort in to perfecting.

Celebrity endorsement doesn't mean success

Another way of conveying a story is by involving a famous personality. Some brands use a wide range of partnership endorsements with celebrities or sports personalities, to enable a unique approach or to target specific demographic groups. However, a mistake many often fall into when using such partnerships is simply relying on the exposure of the partnership. Unfortunately, a well-known name is not enough to achieve an optimal return on investment (ROI).

To generate successful endorsement deals with optimal ROI, it's important to work closely with the personalities, to create an impactful game with a great storyline. An emotional narrative running through a game, with features connected to the personality endorsed, is more likely to resonate with the player. For example, if the personality in question is a well-known popstar, his or her songs would be the perfect fit to accompany the game.

The storytelling approach is the way forward

There are endless approaches with online slot games, but the storytelling approach is arguably the way forward. With multiple ways of conveying a story, brands can achieve great success, while engaging the player with a compelling storyline.

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