



EBR Intel

Report 2017

Casino



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Introduction

The future of casino

Despite increased regulatory pressures, 2016 has proven to be another successful year for the egaming industry. This is particularly true within the casino space, where high performance, innovative casino products delivered anywhere, at any time, and on any device became a reality.

Harnessing the power of mobile and tablet has been a game changer in 2016, with operators and suppliers teaming up to deliver a rich game experience, and one which is either fully optimised or developed specifically for handheld devices.

Recent developments are perhaps best illustrated in live casino. Where once immersive gameplay and real interaction with the dealer, as well as other players, were restricted to desktop play, live casino on mobile now offers all this and more.

And the next area of focus could well be virtual reality which, although yet to make its major breakthrough, made great strides in 2016 as it looks to blur the lines between the digital and real worlds further.

Regulation is also advancing, particularly in Europe where several more countries are examining policy which would open up more markets to online gaming. However, the sector would benefit from a consistent approach across territories, particularly in terms of game specifications, which could then free up more resources for product development.

In this *EGR Intel* Casino Report, we speak to a plethora of the industry's leading figures who detail how the market has developed over the year and what bearing this may have on the future of the online casino industry.

By Tom Simpson | *Report editor*

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Simon Hammon

◆ Chief product officer
◆ NetEnt

Simon Hammon, chief product officer at NetEnt, has a detailed knowledge of the gaming cycle including platform, game development, network operations and affiliate management within the casino sphere.

Featuring: *NetEnt*

Thinking big

Simon Hammon, chief product officer at NetEnt, tells *EGR Intel* why live casino will be one of the key trends in 2017, and why new technologies will continue to drive growth

EGR Intel: What key trends will emerge in 2017 and how will you capitalise on them?

Simon Hammon (SH): The first key trend is new markets; the regulatory landscape continues to change, throwing up new opportunities for us to grow our business and put our games in front of additional players.

We are particularly excited to see how things shake out in the US. We already provide slots content to the market leaders in New Jersey and momentum is starting to build behind the next wave of states seeking to license and regulate online casino games, particularly Pennsylvania, and when they flick the switch we plan to be at the front of the queue to enter the fray.

Similarly, in Europe, we look set for a big year of regulation, with several countries across the continent continuing to assess policy that could open up more markets to online gaming.

As this happens, one area set to benefit is live casino, with changing regulation allowing more operators to integrate the technology into their platforms, and better understand how to leverage the experience it allows them to offer to their players.

The growth of live casino offers many attractions, not least its ability to help bridge online and offline gaming environments. For newer players that have less experience of RNG games, for example, live casino can help take them on a journey to a true and fulfilling multi-channel experience.

EGR Intel: Why do you think live casino is such a game changer?

SH: It offers the most authentic, immersive experience outside of sitting at a table in a real-world casino with the cards in your hands. The

interactive nature of the product is a huge draw for players, who enjoy chatting to dealers as they would on the casino floor. It blurs the lines between the digital and real worlds seamlessly, and brings together the best of both to create a superior offering. For operators, it allows them to build even greater trust with their players and keep them entertained, engaged and excited.

We have focused on delivering the best-in-class live dealer solution for some time now, and are really proud of what we have achieved. For those looking to take things to the next level, our powerful streaming technology allows customers to inexpensively customise the backdrop, tailoring it to their individual brand and style.

The real breakthrough is the quality of live casino we can now offer on mobile. It truly takes things to the next level, providing players with a quality of entertainment that matches the standards that they have come to expect. The only way to achieve this has been to create a bespoke mobile product for live casino, rather than a desktop cut and paste. We have used our many years of experience to create a market-leading mobile-first experience that maximises enjoyment.

EGR Intel: Is it difficult to offer the same quality of live dealer experience on mobile as it is on desktop?

SH: It used to be, and is part of the reason why live dealer has yet to unlock its true potential. That was until we launched NetEnt Live for mobile a few months back, a truly innovative and ground-breaking platform that puts live casino on mobile in a meaningful way for the very first time. We built the product in-house from the ground up, from concept to launch. It was developed in collaboration with players, who know exactly what they want from a live casino product. And it really does deliver.

Its key features include an easy to use interface, portrait and landscape mode, seamless graphics, sound, and epic cross-selling opportunities for operators. For the players, we have also engineered



in features like being able to place bets mid-spin, as they would in a land-based casino. It is the result of hours of design, development, and dedication, but the end result proves it was worth the effort.

EGR Intel: What other new technologies will drive growth in the new year?

SH: Technology is a huge driver of growth; it always has been and always will be. We are particularly excited about virtual reality (VR) and especially now that headsets such as Oculus Rift and Google Daydream are readily available for consumers. We have been working on a VR proof of concept for some time now, and it will be front and centre of our offering at this year's ICE Totally Gaming. We are sure the advent of VR promises to be a game changing development and we will continue to iterate and push the boundaries of what can be done with the technology, to be in a position to capitalise on the platform as soon as it enters the mainstream.

In addition, the shift from Flash to HTML5 is one that sustains new growth opportunities. It allows developers to produce richer, more interactive games and user experiences, with full, cross-platform and browser support.

EGR Intel: Is the online casino industry doing enough when it comes to innovation?

SH: At NetEnt, we have a corporate mission to be the drivers in the industry when it comes to innovation and gaming experience. Innovation is not just for a research and development team, it's a company-wide initiative that all should partake in. We go to great lengths to bring all corners of the business into the innovation process, such as we do with our

annual Innovation Week in March each year.

We always think big. Take new games, for example – this year we launched the NetEnt Rocks Tour, where we marked 20 years of innovation by rolling-out three new game themes based on rock legends Guns N' Roses, Jimi Hendrix and Motörhead.

Each game featured an electric math model and iconic soundtrack that made players want to jack up the volume and rock out while spinning the reels. The tour was a roaring, sell-out success.

This ethos allows us to be at the forefront of new technology, as we are with VR, 3D sound and providing live casino on mobile.

EGR Intel: What can we expect from NetEnt in 2017?

SH: We have an awesome roadmap for 2017 that will see us live up to our reputation as one of the industry's great innovators.

Look out for even more of the best new branded and live casino content, while our studio has again raised the bar with some huge in-house productions.

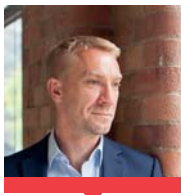
The latest release, *Warlords: Crystals of Power*, is one of our biggest ever in-house titles. We spent a phenomenal amount of time on developing and perfecting the characters, modelling, texturing, rigging, posing and rendering in order to deliver a truly cinematic experience. The result is an animation-heavy style that will appeal to a larger audience.

In summary, 2017 will see us doing more of what we do best; launching incredible games while simultaneously banging the drum for new technologies and platforms. With significant growth in regulated markets and on mobile, with HTML5 at the forefront, live casino and VR experiences to explore, there are many reasons to be optimistic. ♦



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- proven content
- cutting-edge marketing tools
- non-stop operations



Michael Probert

◆ Head of global business development

◆ iSoftBet

Michael Probert heads global business development at iSoftBet, a premier online and mobile game supplier to the egaming industry. He has been working in gaming since 2000 and has held senior management roles with IGT, Bally Technologies and Ainsworth including client services director, general manager and UK managing director.

Featuring: *iSoftBet*

Welcoming change

Michael Probert of iSoftBet explores the evolving industry

EGR Intel: What developments have you witnessed in regards to slot gaming interest/preference over the past 12 months?

Michael Probert (MP): If you look across some of the major operators' websites you will notice that a lot of the same games still maintain prime position and therefore still drive a lot of the income. This can sometimes be self-perpetuating and a new game really needs to grab the players' attention quickly before it starts its descent onto page 23. Saying that, there isn't just one style of game that is the most popular. If that was the case then everyone would be developing versions of it, endlessly. Creativity would stagnate and different players wouldn't have the choice to suit their different requirements.

Sure there are some classic themes that get trotted out: Egyptian, animal, Irish, classic, adventure, etc. and most recently there's been a slew of fairytale titles, but each year suppliers come up with new and interesting features and functionality, themes and layouts, IP rich content and exciting ways to display, pay and celebrate wins. And all of this comes in the latest technology, with smaller file sizes.

Great games continue to be great games and will stand the test of time. For us, Diamond Wild and Super Fast Hot Hot deliver month-on-month, year-on-year because the maths behind the games is solid, players are excited to hit the wins, the symbol hierarchy is clear, the theme is classic and universally loved and the game plays at a speed that is fast enough to keep up their pace of play but slow enough to generate excitement on every spin. This doesn't mean there isn't room for a darker and more modern game such as Paranormal Activity, which was a hit for us this year when we released it over Halloween, or that 24 Respins won't have a place when we release it in March.

It's about delivering a broad portfolio of styles, themes and math models and tailoring each to penetrate specific markets and audiences, which is key for us at iSoftBet as our partner portfolio is very broad.

Of course the device on which players use content is changing and more and more is played on mobiles and tablets. At some point there will be critical mass for wearables and VR, so it's important that as suppliers we deliver a clean and usable interface, specific to device and top quality content for as many devices as we can. This is something that iSoftBet has been very conscious of and we have even created a brand new mobile framework to make development quicker.

"The demographic of gaming is slightly changing as a whole, although each operator differs"

Michael Probert | iSoftBet

EGR Intel: What makes a successful game?

MP: People who have looked into the market and attempted to reproduce successful games will tell you that game development is not a science and there is no single recipe for success.

In order to craft your own successful game you must find the right playing experience for the right player. Some players love certain games and hate others – it's subjective, what works for some doesn't always work for others. However, it does pay to get some things right such as the pacing of the play, a math model to fit the theme, audio that suits the style of the game and doesn't clash, great win celebrations, clear symbol hierarchy and easy-to-use UI. Game development is unpredictable, however, sometimes you think you've got an absolute smash hit but when you put it out into the field it isn't, and vice versa.

EGR Intel: What else are operators after when it comes to casino gaming?

MP: One of the requisites is to have a choice of content from more than just one supplier. Games are the lifeblood of casino operators and they want to be able to add new content quickly and simply and with as few integrations as possible.

Due to the fact the operators have unique regulatory requirements, integrations into different hosting facilities, preferred coin values, default bet sizes, max bets, max exposure, etc. and it becomes a challenge to release games at the speed they require.

At iSoftBet, we have been working on how to optimise this and we have set up a Game Aggregation Platform (GAP) that allows rapid release of slot, table, virtual and live gaming content through the same integration. Included is the option to offer each suppliers' free rounds and bonusing tools, something that is crucial nowadays.

We have more than 20 games suppliers integrated into a fast and stable platform, allowing operators both the diversity and the ability to plan their roadmap at much shorter notice and this is a real competitive advantage for our supplier and operator partners.

EGR Intel: How do you balance the instinct to push your own games to operators rather than those of your supplier partners?

MP: Firstly, our supplier partners are out there speaking to our operator partners directly, on a regular basis, so they can promote their own content as much as they like, and we encourage that.

Secondly, we have been in this business long enough to know that the operator knows their player base way better than we do and that they know what content they need to grow their business. They are aware of the content available and can make up their own mind about what they want to release.

Of course, we also have a team of account managers who understand the core markets of both supplier and operator and have an in-depth knowledge of what type of content is on offer and it is their job to deliver relevant product, whoever it is from.

The approach we take is that we are an enabler of third-party content, if it suits both parties. The way we have approached the aggregation business is to be open and I think that's appreciated on both sides.

EGR Intel: How do you differentiate from the competition?



MP: How does the industry create excitement with a game that is fundamentally an RNG-based 92-96% pay-out game? What we do is change the maths, change the look and feel, and, ultimately, change the players' experience. We aim to create a different pace of play, the pay-out structures, the layout of games, the visuals and win celebration. And, in order to do this, we thoroughly analyse what is missing in the market and improve what might be doing well already. The key is understanding the market and the players you are providing content to. We always try to innovate and build something new and give operators and players new experience.

EGR Intel: What has been the main drivers in the change of customer demand?

MP: The demographic of gaming is slightly changing as a whole, although each operator differs. Many of us suppliers have such a broad range of operators that when it changes in one it might change completely differently in another; it doesn't always work across the board. What we are trying to deliver is a breadth of content and understanding of each market. I don't think that it is easy to say that there has been a systemic change in the player that means that everything is going to change. There is always a gap for all types of products because they appeal to different player demographics. ♦

Featuring: *Playtech*



Playtech

Playtech is a market leader in the gambling and financial trading industries. Founded in 1999 and listed on the main market of the London Stock Exchange, Playtech has more than 5,000 employees in 13 countries. Playtech is the gambling industry's leading software and services supplier with more than 130 licensees globally, including many of the world's leading regulated online, retail and mobile operators, land-based casino groups, government sponsored entities such as lotteries, and new entrants opening operations in newly regulated markets. Its business intelligence-driven gambling software offering includes casino, live casino, bingo, poker and sports betting.

Playtech: 2016 – A year in casino

Playtech discuss how to stay ahead of the competition

The business continues to go from strength-to-strength with very strong progress in our primary gaming division with new licensees and renewals securing future growth. Casino continues to be a driver and our casino teams have had yet another exceptional year delivering the industry's best performing in-house designed and branded games content.

We are the industry's leading omni-channel software, systems and services supplier with more than 130 licensees across 20 countries. Founded in 1999 and listed on the main market of the London Stock Exchange, we have more than 5,000 employees in 13 countries.

In-line with our pioneering Playtech ONE omni-channel offering, our casino product enables players to access their favourite games anywhere, at any time and on any device through a single wallet and single account

Unlike our competitors, we cater to every player need with our host of diverse content houses. This ensures that we can offer different flavours of slot products to suit each regulated market and licensee requirement. In doing so, we are proud to provide our customers with an unrivalled selection of casino content and thus deliver the ultimate gaming experience for everyone and anyone.

Our commitment to providing new and existing licensees with access to our leading content, powerful platform and fully automated marketing tools ensures operators are able to deliver the ultimate casino experience to their players.

Key highlights include:

- Significantly extending our industry-leading slots portfolio to more than 600 games including long-term premium branded games deal with Warner Bros. and DC Comics. This has so resulted in the roll out of six Batman Classic TV Series games.

- Developing a large number of in-house slot games including Tiki Paradise, the first omni-channel-enabled title on the market, and Age of the Gods™, a series of seven superhuman slot games that rapidly rose to become some of the most successful and best performing titles in Playtech history.
- Launching our largest-ever casino network promotion, offering players a chance to win £250,000 among other mega money prizes. This generated significant revenue uplift for licensees.

Premium branded content

We have long offered the industry's best-performing premium branded content and this will expand next year with further announcements to come.

This year has been outstanding for Playtech branded content, having also released major titles including games based on The Flintstones, Space Invaders and Ace Ventura, to name just a few. Our unrivalled offering underlines our position as the industry's leading casino content, software and services provider.

Driven by our award-winning IMS player management platform and intuitive business intelligence technology, Playtech casino boasts more than 600 cutting-edge titles with a host of spectacular in-house designed and premium branded games.

A significant launch this year followed our partnership with Warner Bros. Consumer Products and DC Entertainment to unveil a portfolio of slots based on DC's 1960's Batman Classic TV Series. We have so far released six titles including Batman & The Joker Jewels and Batman & Catwoman Cash, two sensational titles where players help the Caped Crusader take on two of Gotham City's toughest Super-Villains. Both games feature eye-popping artwork, classic footage and catchphrases from the well-known television series.

Our commitment to premium branded content has ensured that we remain firmly ahead of the curve and deliver games that are a true reflection of

the brand. Unlike our competitors who often design 'logo-wear', we strive to create games that embody the brand while offering exciting and engaging gameplay.

Leading in-house designed games

In June this year, we unveiled the first four of seven titles in our highly anticipated Age of the Gods™ series of progressive jackpot network slot games. All the games in the series are based on a proven and highly successful math model, designed in-house to appeal to a wide audience of players. There was a controlled launch and backporting process that ensured that all games could be switched to go live immediately with minimal down-time for the company and our licensees.

The launch of the series was supported by a

Unlike our competitors, we cater to every player need with our host of diverse content houses

Playtech

unique cash campaign giving away a gigantic £250,000 for players playing our new series across our top tier licensees. Playable on any device, our flagship Age of the Gods™ game presents an action-packed five-reel, 20-line slot boasting incredible neon graphics, unique bonuses and thrilling features. Age of the Gods™ game exceeded all expectations and was one of the most valuable games out of all our UK slots between the period of June to August 2016 – just two months after launch. Our superhuman series also includes Age of the Gods™ King of Olympus, Age of the Gods™ Furious Four, Age of the Gods™ Goddess of Wisdom, Age of the Gods™ Prince of Olympus, Age of the Gods™ Fate Sisters and Age of the Gods™ Roulette.

Best-performing progressive jackpot network

We also have the industry's biggest and best-performing progressive jackpot network with 70 unique titles to choose from and more than 20,000 progressive jackpots won each month. In January this year we set an all-time record for the most number of game rounds played on our platforms in a single day. In just 24 hours Playtech platforms supported 594 million game rounds or spins across all our products. On an annual basis this equated to a 122% increase compared to the same period during the previous year and goes to show the huge progress we have made and continue to make as the



business grows to new heights.

Last year also saw a steep rise in mobile penetration, with 104% growth in revenue across our mobile slots. As a result of our commitment to providing a true omni-channel experience, players are rapidly engaging with, and adopting, new technology and ways to play their favourite casino games.

Our intuitive technology allows for both portrait and landscape play ensuring players can play however they want. Our feature-rich user interface is also customised for all channels including web, mobile and tablet devices delivering a complete, omni-channel experience.

Jackpot network promotion

Earlier this year we launched our largest-ever casino network promotion, offering players a chance to win £250,000 among other mega money prizes. This generated significant revenue uplift for licensees. The independently adjudicated cash giveaway coincided with the launch of the first Age of the Gods™ slot game titles and consisted of three draws including one worth £100,000 and two others, each worth £75,000. Headline prizes will top £5,000 with hundreds of smaller cash prizes in order to create as many winners as possible.

In order to be in with a chance of winning some huge sums of cash this summer, players received one ticket for every £10 cash bet they placed on selected Age of the Gods titles. Each draw also contained one double ticket game whereby players could double their chances of winning huge sums of cash by receiving two tickets for every £10 they spun. ♦

Featuring: Playtech



Daniel Flesch

♦ Commercial director

♦ Dragonfish (part of 888 Group)

Daniel Flesch has been with 888 for nearly a decade, and in that time, his responsibilities have covered a wide range of areas including business development/sales, product, marketing and account management. Today, he is primarily responsible for identifying and securing new white label partnerships across all gaming verticals, with particular focus on casino and bingo. For more information, please contact Daniel at: Daniel.flesch@888holdings.com.

Featuring: *Dragonfish (part of 888 Group)*

How our industry is changing

Daniel Flesch of Dragonfish (part of the 888 Group), speaks to *EGR Intel* about the latest industry trends and what we can expect in the near future

EGR Intel: What trends have had the most impact on casino over the past 12 months?

Daniel Flesch (DF): When looking at trends over the past 12 months, the place to begin is mobile and new player demographics, with millennials starting to set the tone. For those reasons, Casinoflex is built around a flexible, more recreational and entertaining approach.

Mobile penetration in casino has been slower than sports betting but mobile has become the platform of choice for casino players in the last 12 months. This means that our platform needs to be mobile first while still investing in desktop to cater for what remains nearly half of the players on the platform.

Casinoflex has one of the leading mobile propositions in the industry which focuses both on the player experience and the operator's experience in managing the offering from backstage. Developed in-house and benefiting from 888's experience of running one of the world's leading online casinos, our mobile casino offers well in excess of 100 games, across tablet, smartphone (iOS and Android), with an optimised user interface for each device.

We've seen a number of other trends continue to dominate through 2016, and the second one I wish to highlight is the increase of branded content tied to popular movies, TV shows and musical icons. This has been driven in part by players' desire for diversity and the addition of new games to their favourite casinos.

Our Casinoflex offering includes games from our fantastic in-house game studio, which has produced exclusive branded games like *The Big Lebowski*, *A Nightmare on Elmstreet* and themed favourites like *Treasure Fair* and *Jack's Pot*. We also have the

benefit of placing this fantastic exclusive content alongside hugely popular games from our great content partners, like *Guns N Roses* from NetEnt and *Evolution's* live casino.

EGR Intel: How has technology affected casino? What advancements have been the most pivotal?

DF: As already mentioned, the move to mobile as the device of choice has been the main technology challenge in recent years and probably the most pivotal. Increased bandwidth to the end user in both mobile and fixed broadband networks has meant that we can deliver richer content to players and offer greater quality entertainment through things like animation and video in slots and high quality live dealer tables.

The phasing out of Flash for HTML5 has meant we've had to phase out or replace some of our older games and as we see virtual reality start to enter the casino space that could well be the next pivotal game changer, although, the jury's still out on that one.

Continued technological improvements in our ability to analyse and segment player behaviour means that promotions are getting even more personalised and real time than ever before.

It is also worth adding that Dragonfish is enjoying the technological investment of 888, which gives it access to the most sophisticated acquisition and CRM tools in e-commerce today. This includes Big Data analytics and real time, personalised marketing, to name a couple.

EGR Intel: How do companies differentiate from one another in a changing casino landscape?

DF: Online casinos differentiate in a number of ways, ranging from game content to promotions, to the overall player journey, including the incorporation by some operators of social gaming features and gamification into their real money offering.

Casinoflex offers its partners the ability to cater for the complete range of player demographics. The platform can be used to extend an operator's existing



Featuring: Dragonfish (part of 888 Group)

brand, to cater for and target a new demographic. A good example of this is Foxy Casino who have been able to successfully extend the Foxy brand from a largely female focused bingo brand to a more balanced male/female audience that generates a higher yield.

On the other hand, the Casinoflex platform also caters for new entrants to the market, who are looking to target a more traditional casino player looking for more table games, and, in particular, live content.

Through our relationship with the likes of NetEnt and Evolution, we have expanded the Casinoflex games portfolio, and, therefore, the platform's ability to offer a more hard core casino offering (GrandMayfair.com for example) alongside the softer casino experience like Foxy Casino. In short, the Casinoflex platform offers simple incremental revenue for existing partners, as well as a proven economic model for new entrants looking to enter the online casino market.

Our focus has always been to develop the products and services which will bring our partners the flexibility and differentiation capabilities needed for today's online gaming. Over the past two years we've been able to significantly broaden the range and types of partners and brands, from recreational to more hard core casino destinations. Crucially, we also offer the tools and platform capabilities, as well as the games, to cater for these two different approaches, allowing companies to differentiate in terms of the demographic they choose to target with their brands.

Mobile penetration in casino has been slower than sports betting but mobile has become the platform of choice for casino players in the last 12 months

Daniel Flesch | Dragonfish (part of 888 Group)

EGR Intel: How have customer demands shifted in regards to casino? What do they now expect?

DF: There are a number of things players look for in an online casino, from the importance of trust and a good customer service experience, to enticing promotions, to fresh and branded game content.

As well as offering games from the leading third-party game providers (including Evolution, NetEnt, SGI), the Casinoflex platform also benefits from over 100 exclusive in-house games. With new titles being added on a regular basis, this has allowed us to cater for player's desire for new games to play.

EGR Intel: What further developments can we expect in casino?

DF: Alongside new exciting technologies, like virtual reality, we can also expect further developments in the offline/online convergence, especially around cross sale from bricks and mortar to online, and vice versa.

Coupled with analytics and mobile, Casinoflex is now looking to provide partners with the ability to tap into new segments and create effective channels through intelligent marketing. This product innovation is key in regulated, competitive markets. ♦

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