

iGamingFuture

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THE FUTURE OF

AFRICAN GAMING

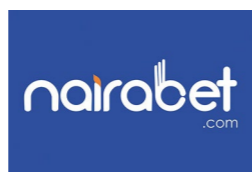
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Insight from iGamingFuture

Africa is a rich iGaming tapestry made out of a diverse range of market conditions and disparate consumer trends. Although dealt with differently across the region, the impact of the Pandemic was of course felt across the entire continent, bringing with it a range of challenges and opportunities.

This eBook will give you an exclusive, 'on the ground' insight into Post pandemic Africa. Helping you to understand the regional market differences and how these nuances can be leveraged for future growth opportunities.

We're currently experiencing a watershed moment in iGaming. **Never before has the market seen such strong digital growth**, accelerated of course by the Lockdown. **Key established markets, especially in Europe, have become almost saturated, leaving limited room for operators to grow.**

Emerging markets, such as Africa, will play such an important role in the future of our industry, it's important to give them the attention they deserve and really try to understand the driving factors behind the key growth markets; providing our sector with the best chance for a sustainable future.

Looking for more insights?

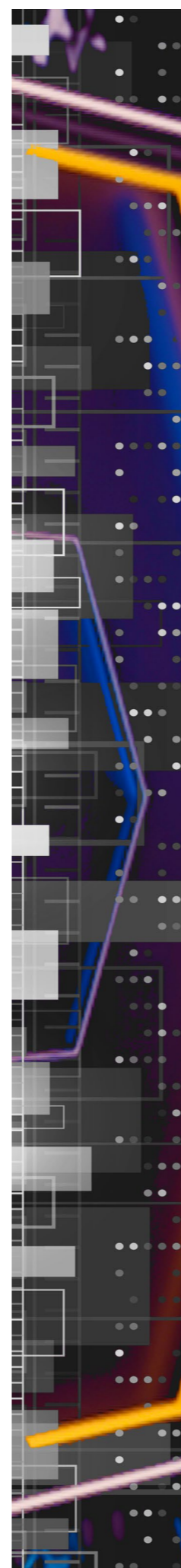
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What was the impact of the pandemic?

> **Oluwatosin Soyán - Head of Online Operations - Naira Bet:**

Covid-19 really had a negative impact on the business. A lot of sporting events were rescheduled or cancelled, which in-turn reduced our offerings, hence cutting down revenue. Some 2-legged events were cut down to 1-leg and also take, for instance, the Olympics and UEFA Euro 2020, which did not take place. The industry thrives

online business has its advantage over retail because retail has a very high overhead cost, **but the impact of retail cannot be neglected** as well. **Players had to switch online and some suspended betting during the lockdown period, because there were really no sporting events going on** around the world.

> **Edwin Tarus - Senior Business Development Specialist - TVBET:**

Due to quarantine restrictions, **many land-based shops were forced to close. This led to**

> **Adekunle Adeniji - Managing Director - Betbonanza:**

Nigeria is 70% retail, so we were massively affected by the drop in sales from shop lockdowns. However, players will always play if there is an opportunity, so **we quickly adjusted to create valuable online offerings. When there was no sport, we introduced Esports and Virtual games** to fill the void; this was very well received by our punters **and enabled us to close the gap on our revenue losses.**

> **Tumaini Maligana - Country Manager - Parimatch Africa:**

In Tanzania there was never actually an official lockdown, but things did slow down as players mindsets switched from earning mode to survival mode. With no live sports, sportsbook operators struggled greatly and at that point, Parimatch had no online casino offering either. **We immediately applied for an online casino license, and it was approved within a month. Launching our online products was mainly driven by performance marketing, drawing most of our traffic. One of the biggest challenges was internal, training our staff on the new products so that they could give adequate support to our customers, which took some time. We stopped a lot of the Below The Line marketing activities** due to staff cuts, **enabling us to concentrate more on mainstream** >



> **brand awareness, as opposed to more granular style marketing.**

> **Jimmy Keneth Masaoe - Chairman - Tanzania Sports Betting Association:**

The pandemic had a massive impact on our manpower. Between March and May 2020, we experienced a 90% drop in sales, the lack of live sports resulted in massive redundancies unfortunately. **But through this bad experience we learned how to be flexible** as a business, **finding new ways to engage our customers.** Most operators in Tanzania only had Sportsbook and Virtual Sports. We tried to push Esports but it didn't really connect well with our customers. **We put most of our focus on Online Casino and the turnaround was quick,** because the government understood the importance of being able to offer these products for our industry survival and keeping tax revenues flowing.



What are the best ways to convert players to new online games?

> **Edwin Tarus - Senior Business Development Specialist - TVBET:**

Operators must make their sites and applications as user-friendly and understandable as possible. Nobody wants to use complex, albeit beautiful, technologies. Everything should be simple. **Players want to have fun and relax! So, operators need to**

objections and many ways to attract the players.

> **Tumaini Maligana - Country Manager - Parimatch Africa:**

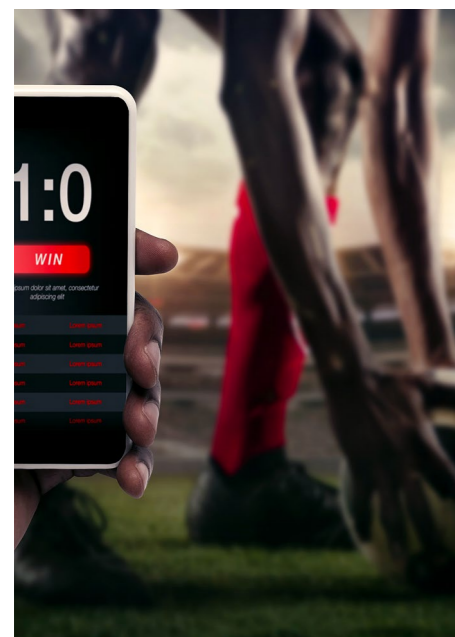
Introducing players to new games is really difficult to do without first offering players a free trial. We've had great results utilising CRM activities to award players bonuses, free activities and free bets to get them converted to new games. This has been **effective in enabling players to become comfortable in testing new**

“ **The industry thrives on daily sporting events... when there are no events, the industry is down.**”

- **Naira Bet**

on daily sporting events and when there are no events, the industry is down. We had been very big online before the pandemic; the

the shift to online, and operators were forced to focus more on developing their business on the Internet. Now the situation is certainly improving. **But we hope that online casinos will continue to go live.** Moreover, the development of **gambling entertainment expands through mobile, and more bets are placed through this device not only in Africa, but all over the globe.** After all, it is convenient. Internet access is at hand and still improving, while charges slowly drop. **The main reasons why African punters like to visit land-based parlours, except being a great social spot, is limited access to computers.**



“ **Nobody wants to use complex... technologies. Everthing should be simple. Players want to have fun and relax!**”

- **TVBET**

strive and keep usability at the highest priority. Having similar products in both channels is also very crucial, to create the familiarity. They want to be able to play the games that they already tried in the retail. It is common that **local operators are hesitant to add new products, they worry that the punter won't understand it, however there are so many solutions to resolve these**

products, once the punters have an understanding of the game mechanics and how it differentiates from other games, then making the transition becomes very easy. For example, Spin2Win became very popular amongst our customers once they realised that it is just a normal roulette game, but on a circular board.

> **Jimmy Keneth Masaoe - Chairman - Tanzania Sports Betting Association:**

Content marketing is not as effective over here as it is in the EU, from my experience. We thought it would be hard for **customers** to get used to playing these kind of online casino games, but their **previous experience with virtual products**, such as Keno, **made the transition much easier to make**. Plus, there's no land-based casinos in Tanzania, so Online Casino is the only option Tanzanain consumers have ever had. **Educating our staff is also paramount in our game conversion strategy**. We spent a lot of time, well before launch day before we had even received our license, teaching our staff about the new games. Ensuring they were



> **Mark Schmidt - Director of Sales for Africa - Pronet Gaming:**

Localisation is essential. The best illustration of this is the differences that exist between Kenya and Nigeria. Free to play games in Kenya are hugely popular and players do not necessarily have to spend anything to enter contests that contain large jackpots. In Nigeria, virtual games are must-haves for operators. **Knowing your specific**

There are alternatives to retail throughout Africa, but to loosen its grip and prevent events like the recent pandemic from having such a negative impact in the future, a thoughtful approach that takes into account the nuances of each region is crucial.

> **Akarshit Mandhotra - Business Development Manager - Uplatform:**

Through market knowledge. African players appreciate simple and easy ways to enjoy the betting process, and that is through apps and websites. That is why we always help our clients, guide them through each step, explain how it works and personalise their services as much as possible to get ready for online betting. African players develop a preference for online over retail when you provide quality, easy-to-use access to gaming. Players can conveniently open the application at any time, see personalised betting possibilities, easily filter options they need, and process fast payments in a way they favour, even through SMS or Telegram. Our clients in African markets **efficiently convert players to online** >

“ We always help our clients, guide them through each step, explain how it works and personalise their service.”

- Uplatform

well equipped to support our players.

customer's needs is everything.

It must be said that the **online infrastructure in many parts of Africa is still a major challenge** for online operators. While geos like **Europe and Asia successfully filled the gap in live sports during the pandemic**, with verticals like online esports, casino and slots, **the lack of a wide-spread mobile alternative has hampered a similar recovery in Africa.**



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> gaming by providing them with a simple and market-specific experience, thanks to the versatility of our Omnichannel solution.

> **Adekunle Adeniji - Managing Director - Betbonanza:**

Content creation has been a super useful tool for us in regard to re-educating our players on new games and online products. We've used **blog sites and video demonstrations to present new games**, coupled with bonuses to encourage them to try for the first time. **In Nigeria, all operators are practically offering the same products, so there's a lot**

What are the new products and gaming trends emerging in the market?

> **Oluwatosin Soykan - Head of Online Operations - Naira Bet:**

Turnover in the virtual games and casino went up during the pandemic as expected, we even saw the advent of new products like the simulated reality football leagues and the zoom football. **Virtual events have always been the game changer since they were introduced.** You don't get to have sporting events every day and even when there are events, they

“Content creation has been a super useful tool for us in... re-educating our players on new games and online products.”
- Betbonanza

more awareness in the market in regard to online games, even with Esports, as most punters will have seen it before elsewhere. **This helped us a lot when deploying, as there was already some familiarity** with the punters.

start and end at particular times. **Virtual games run round the clock**, there's a new round of games event 5 minutes. The virtual football league runs round the clock (11 complete seasons of 38 rounds of matches per season), dog and horse races running

every 5 minutes. **The casino as well, it never stops.**

> **Akarshit Mandhotra - Business Development Manager - Uplatform:**

The convenience of technological innovations, because the main feature for the African market is **“Convenience” with everything.** This market requires Convenient access, Convenient processes, and Convenient payments. That is why, thanks to long-standing partnerships between Uplatform and local telecom operators, **we have created a platform that allows for the process of payments via SMS or even telegram** — accompanied by 250 payment methods that include the convenience of the most popular local payment methods in each African country.

Poor internet connections and low internet speed is a big aspect that is limiting the African market's full potential. However, Uplatform is prepared for this; **we develop custom Apps to cater to these markets, providing compressive localisation, customisation, and optimisation for the end-user experience.** As a result, we primarily address this issue **by delivering fast-loading applications and lightweight website versions for all mobile browsers.** SMS and telegram betting is available as well! Also, **our multi-lingual and multi-functional agent** >

> **scheme software enables us to create** with ease, control, and management **a transparent and effective scheme of agents and master agents, widening the playing base across Africa.** Even if the player does not have direct access to the internet, they can still place bets, opening up a much more significant number of African players.

> **Edwin Tarus - Senior Business Development Specialist - TVBET:**

As for the gambling trends in **Africa, sports betting, especially football, is still relevant** and of particular interest to African players. Few years back, nobody heard of **virtual games**, but they are **now a leading product and a 'must have' for every operator.** Horizons are expanding and possibilities are growing day by day. Operators are aware and they do open up to new products. **In addition, there is a growing interest in lotteries** such as Bingo or Keno, as we mentioned earlier. **Live casinos are the next in line to create some buzz in**

is for other suppliers to integrate their products, but our TVBET frame is connected with ease, and we also offer free integration, which is not common. **The interface is user-friendly and intuitive, we take each customer by hand throughout the whole process.** The story of nurturing doesn't end there.

> **Robin Jakobsson - Managing Director - OddsCraft:**

Other sports, such as cricket, is a major sport in e.g. Asia and has the potential to become a large sport in Africa too. It's predominantly Live Betting which makes it very suitable for the African market, which has a mobile-focus suiting live betting. The major events are usually broadcasted so it's possible to find a stream and watch the game, while customers place bets. **The pandemic taught us that whenever a league is paused, it's an absolute necessity to be able to rapidly lead end users into other areas to place their wagers. Sports like cricket can be cross-sold** by providing

Another advantage with adding new sports is that you could stand out from the crowd from a marketing perspective **and reach new target groups.** With an extended bet offer on Cricket, which OddsCraft could offer, this will bring improved bet opportunities for the customer, always giving them something relevant and interesting to bet on. If the African operator

> obvious when we examine the average number of users each betting brand has across various countries, presenting figures that would impress any European operator. **Across the continent, operators are getting it right when it comes to maintaining player trust and, as a result, retention.** Operators in countries like **Ghana and Nigeria have remained adept**

at keeping their punters engaged, not just with football betting, but **with free-to-play, virtual and casino games.** They have risen to the occasion **and learned how to become entertainment providers,** not just betting brands. **Another element where Africa is playing a world-leading role is within payments.** In Kenya, the use of mobile phones as payment devices is widespread. One survey last year found that in Uganda, 43% of people had a mobile money account and in Kenya, the number was 72%. In other parts of Africa you can only deposit and withdraw to and from a gambling site using a bank transfer, which can take hours.

What is the level of innovation in the market and what advancements in tech are still needed to take this region to the next level?

> **Oluwatosin Soykan - Head of Online Operations - Naira Bet:**

Factors like responsive desktop, mobile and mobile lite websites, with a **fantastic user experience and ease of navigation is a major key to succeeding in the Nigerian market.** A very good betting software provider that responds to the immediate needs of its operators/customers is what's most needed. **Cheaper data - This is where the mobile lite website comes into play** (The version of the site that runs on low end mobile phones via opera mini browser). **This will enable so many more punters to be able to take part,** as data is still relatively expensive compared to European markets. **Diverse game portfolio - Offering a wide range of products across different sports and platforms;** this leaves the punters with a lot of options, but most importantly websites must have a nice UI and the UX must be top-notch as required by the visiting locals. **Education will also play a large role for both the players and the staff** serving them. **Retail and Online must operate on the same platform** so that booking codes and bet numbers can work together. >



promotes other sports such as cricket, ice hockey, basketball, tennis etc. it is also easy to use the features of Betrix™ and combine the extensive bet offer into one single unique bet.

> **Mark Schmidt - Director of Sales for Africa - Pronet Gaming:**

Counterintuitively, Africa is at the forefront of innovation worldwide when it comes to the delivery of online gaming to suit its users' needs. This is >



“ Ghana and Nigeria... remained adept at keeping their punters engaged... with free-to-play, virtual and casino games.”

- **Pronet Gaming**

the old African Land, especially TVBET games, which are fast and easy to play. Not to mention our stunning presenters, who are hard to ignore. We are not sure how simple it

end users the virtual version while also offering free bets or other suitable incentives to learn how it works. With the Virtual Cricket the operators will be able to have an offer up and running 24/7.

> These are the most important factors in securing the future success of our market.

> **Tumaini Maligana - Country Manager - Parimatch Africa:**

We have a massive need for more localised back-office solutions, most of the technology currently available is based on the European market.

It can really **inhibit our ability to give satisfactory customer experiences** as we're limited on what we can do. For example, with KYC processes and anti-fraud **there's a continual challenge as Tanzania has quite unique demographics**, where many of our customers are 18 years old and every year, 1.8 million people turn 18 years old; this is a major customer demographic that we need to put a strong focus on. Most operator's KYC **software is from Europe so customers need passports, driving licenses, etc., to be onboarded but this just isn't practical in our Tanzania**, most people do not have these documents. **This is a very big issue for us and we're actively seeking more robust verification solutions** for this.

> **Mark Schmidt - Director of Sales for Africa - Pronet Gaming:**

A lot has been made of the rise of mobile on the continent, and growth rates remain very impressive. **Yet retail still rules the roost in cash-focused economies**

wherever you look. As a result, **the closure of shops and the loss of live sport produced a perfect storm through which online has the opportunity to grow further.**

To help operators avail of these opportunities, Pronet Gaming takes a consultative approach to any new client, in any new country. **Our clients play an active role and we listen to them and adapt to their needs.** We also have a very strong executive and product team. This provides us with the edge over our competitors in the region in terms of knowledge.

> **Robin Jakobsson - Managing Director - OddsCraft:**

With mobile having become the most common way to bet, innovation has been extensive during the last decade, **although the innovation**

punters. **Product innovation should not only make betting more fun, but also make betting simple, quick and easier to understand.** If your product also gives users a high degree of freedom to get exactly the bet they want, you are definitely on the right track in terms of innovation. In the same way as a great payment solution simplifies the pain and waiting time for end users, OddsCraft's Betrix™ products eases the pain each time people place bets. Betrix™ is a time-saver for end users and heavily increases the amount of approved live bets. Betrix™, allows you to create your own bet option. Any bet option can be found within one single mobile screen, and no tab clicking, or scrolling is needed to find your bet. There are billions of bets to choose from, and you create a unique bet option that suits your preferences within seconds.

“ **We have a massive need for more localised back-office solutions.**”

- Parimatch Africa

focus has mainly been for non-core products (sign up process, payment solutions, automation, gamification etc.), **while the most relevant area for end users, the betting itself, has somewhat stagnated.** Except for Cashout and Bet-Builder becoming standard and a continuously increasing amount of betting options, **we still lack evolutionary jumps and significant innovation for sports betting.**

The betting experience is the essence for today's sports

We strongly believe that solutions with a high degree of customer freedom will drive the future growth of the African sector this decade. Products that minimise time- and energy- consuming factors will become a definite win-win for both punters and sports-books. For African countries, already having a strong mobile user generation, these kinds of innovations will be essential for the end user's likelihood to sign up and also for the retention of customers. ▲



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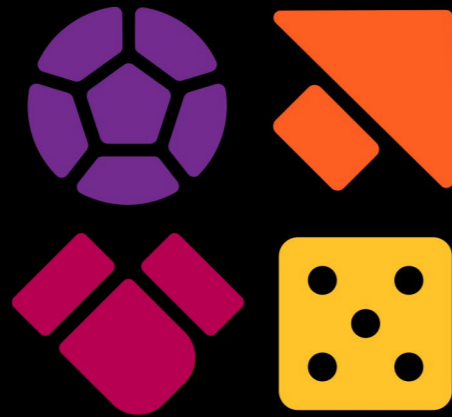
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EDITOR'S CONCLUSION

Hearing from the range of African stake holders above demonstrates some very exciting times for this dynamic region.

Whether you're in East or West Africa, the **changes catalysed by the Pandemic means a raft of new, 'game changing' products have been ushered into market.**

This has been well supported by governments, such as Nigeria and Tanzania, who are refreshingly agile enough to move with the times, **giving their market stakeholders the best opportunities to survive and thrive.**




Creating increasingly localised solutions will be the key to future growth and Africa finally developing into its true potential."


It seems that **the biggest challenges right now are in customer education** of these new products **and finding back-end solutions tailored for individual African markets.** Many of the Tech being used has been supplied by European tech companies, who are yet to fully grasp the nuances of the key African markets.

Creating **increasingly localised solutions will be the key to future growth** and Africa finally developing into its true potential.

Exciting times ahead!



““ *The future of the industry relies on the ability for great minds to share powerful ideas.”*



- iGamingFuture