

THE

iGamingFuture

MAGAZINE

SERIES

October 2022

The Future of

Omnichannel
Gaming

The iGaming Superstore™



Gamification

Real-time CRM

Personalisation

Gamanza's Player Engagement System includes a Real-time CRM and a comprehensive range of Gamification tools that are easily managed from an ultra-slick user interface. Built to drive player value and retention, this powerful combination creates seamless player journeys and adds a new layer of entertainment and personalisation to your gaming operations.



Real-time
CRM
Software

Customisable
Gamification & Loyalty
Tool-box



Comprehensive
Personalisation
Engine

Connect your
Land-based & Online
Operations



MARKET OVERVIEW

Beyond question the Covid19 pandemic has shifted gaming behaviour. And, as a consequence, player churn is at an all-time high.

Indubitably, we've seen a **significant shift to the online space. Nevertheless, the key to success remains a multi-channel approach.** It is only by embracing the Omnichannel concept that we **can ensure the lifetime loyalty and strategic value of our customers.**

Navigating legislation around advertising, liberating loyalty, unleashing engagement, while all the while trying to take a 'beyond the bonus' approach, is becoming harder to achieve –

especially across channels ranging from sports betting to casino. In short, **it has never been more important to deliver a multi-channel marketing mix** – one that finds balance and delivers a positive and personalised experience – than now, in the present.

We must ask ourselves:

- **Are we as marketers identifying and profiling players well enough** to pull them through different channels?
- **What secrets lie within the behaviour** of land-based and retail customers?

The trick, we at iGF believe, is Cross-selling and Upselling, whilst always differentiating and understanding the key difference.

This quarter's eBook identifies some of the biggest multi-channel questions, delivered to you by some of gaming's biggest brands and industry leaders.



Curtis Roach

Head of Content
iGF

INDUSTRY **INSIGHTS**

As the market landscape evolves and adapts to new player trends, our industry has now been compelled to react accordingly.

In this section we hear from some of our industry's leading lights, sharing their personal perspectives on how to leverage your CRM to cross-sell and create the best omni-channel journey for your customers.

Looking for
more insights?



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Among our **Expert Speakers** include:



Arjan Korstjens

Chief Operations Officer
Merkur Casino



Gavin Hilton

Director, Customer Retention
William Hill



Henk Wolff

Chief Marketing Officer
Blitz Casino

CONTENTS

6

INTERVIEW

Forging the Road Ahead from Land based to Online Gaming

with Robert Civill, Chief Commercial Officer, *Gamanza*

10

Q+A

with all our Expert Speakers
[see below]

18

Editor's Conclusion



John England

Head of CRM
Industry Consultant



Marcel Tobler

Chief Strategy Officer
& Board Member
Stadtcasino Baden Group
& Gamanza Group

FORGING THE ROAD AHEAD from Land based to Online Gaming

As we continue to move forward - as an industry, into the world of online - **catalyzed by the Pandemic**, there's an **increasing stream of land-based operators hoping to make that successful online transition** also.

However, **this can be a difficult process when attempting to migrate players and give them the same player experience** as a buzzing casino or betting shop floor.



Robert Civill

Chief Commercial Officer
Gamanza

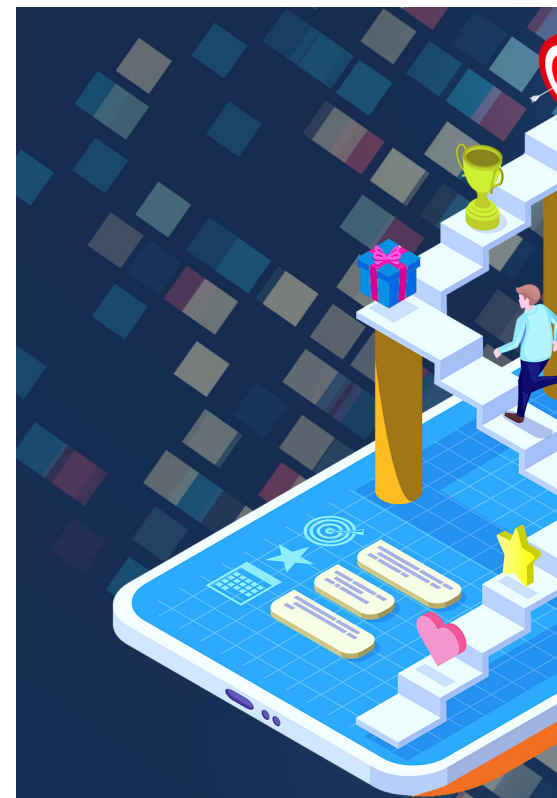
We caught up with Robert Civill, Chief Commercial Officer at *Gamanza*, to hear his thoughts on the perfect roadmap to online success and more importantly, how the world of land based and online can be synchronised to give customers a 360 experience and create a path to sustainable growth well into the future.

1 With an increased number of iGaming markets opening up around the world, what advice would you give land-based operators hoping to make a successful switch online and bring their existing customers along with them?

I would **always encourage land-based operators to embrace the online opportunity**, but it's **not to be taken lightly**, it **must be part of a solid strategy and a commitment towards digital transformation**.

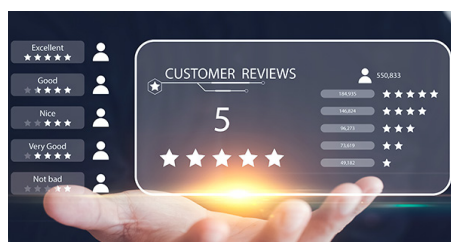
It's **paramount** to choose a **technology partner** that **understands your existing business, local regulation and technical guidelines** and one that provide the **right mix of managed services**.

Although I feel it makes sense to fill a couple of key positions with people that have a deep knowledge and wealth of online casino experience, **I sincerely believe that it's essential for the driving force of the business change to be somebody at the C-level with heaps of passion for the journey!** This will help ensure that a comprehensive know-how of the online sector is



nurtured and transferred within the core management of the organisation.

It's also **very important to keep the casino staff informed and be promoting the new online venture to existing clientele a long way out from the launch, also with a pre-registration offer.** With solid planning you should be in a position to hit the ground running immediately upon go-live, retain a high level of control over your own destiny and create sustainable long-term value.



2

Gamanza is the turn-key technology arm of Stadtcasino Baden.

How does the experience of being an operator help to strengthen the products you offer your partners?

It certainly allows us to have a much broader and deep understanding of the local regulations and customer pain-points. This helps a lot in the newly regulated and highly complex jurisdictions that we currently serve, where the regulations and requirements are always evolving. **This brings a demand for technical adaptations, more customization and new solutions.** Despite how challenging that is, **we're ultimately offering a highly**

flexible product that caters for the demands of regulated markets and the specific needs of land-based casinos with online operations.

This doesn't just come from our experience with the group's operations either, **we have always been open to customization and the ideas of all our customers.** In fact, **we hold an annual "Gamanza Summit"**, which as well as providing an opportunity for our customers to meet each other, it allows them to participate in product demos/workshops and insight sessions. It's a **perfect opportunity** for us to obtain **valuable feedback**, which again goes towards **shaping the product roadmap.**

3

What are some of the most effective ways to merge the online and land-based experience?

(EG. Loyalty schemes, cross-selling?)

When players receive marketing communications, interact with the brand and play at the online casino, the **association with the land-based venue should be clear for all to see**. This **reinforces the player trust and gives** them a sense of a **personal touch** - they are dealing with people, at a prestigious venue and **there is more to this online casino than a digital transaction**. We have found surprisingly that many online players have never been to a casino, so **the anonymity of an online casino allows people to** discover games and have fun as they **learn how things work**. This **creates a natural curiosity** and an interest in visiting a casino **to experience "the real thing"**.

With that in mind of course, it **means that your online casino can feed the land-based operation, potentially as effectively as the land-based can boost the online casino, so cross-promotion of both environments is hugely**

valuable. For example, your online activity can earn dinner and drinks at the land-based casino, and on the other side of the coin, by participating in a campaign at the land-based casino you can earn a bonus to redeem online. **This kind of hybrid loyalty scheme and enablement of cross-selling between land-based and online is a major focus of Gamanza.**

4

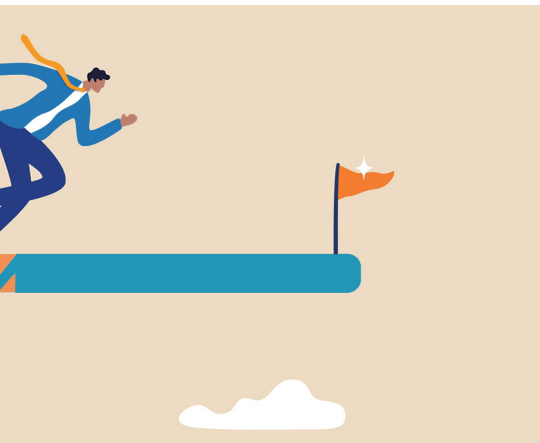
VIPs often contribute the majority of revenue for online operators, which brings risk. **What can operators do to reduce reliance on VIP players and increase retention of wider audiences?** (EG. Gamification, CRM)

There is **no golden bullet** of course, and **different approaches and ideas can yield positive results**, but I would say **it's certainly a challenge that can be taken on with gamification**. When I use the term "gamification" I'm referring to mini objectives and missions, collectibles, competition and records, as well as points and levels. These are the **features and mechanics** that **drive the engagement in other gaming formats** and we can **apply them to any gambling vertical to add a new dynamic**.

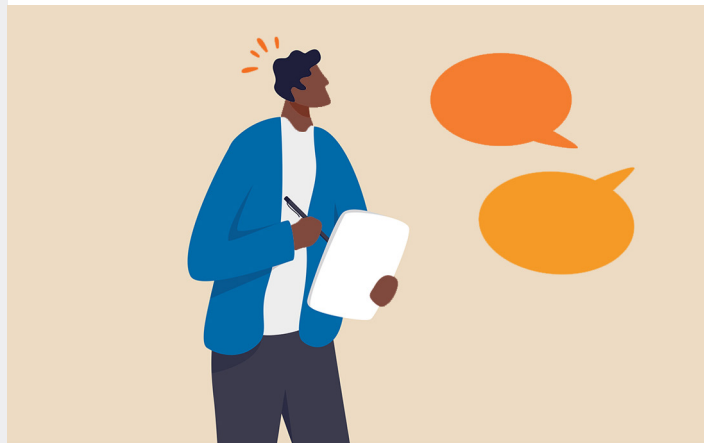


I do **acknowledge that gamification features don't appeal to everyone**. It's **quite probable that a VIP or a casino purist are motivated** and stimulated **by other factors**, but **gamification is known to be highly appealing to new generations, casual players and those making the transition** from mobile and video games. **A good system of gamification considers a player's normal betting levels and is delivered intuitively on the front-end in a theme that compliments the brand**. This **goes a long way to boosting retention levels and increasing the value of that much wider portion of the player base**.

Gamification can also contribute to the acquisition stakes as well, as players seek out new concepts and unique features that are not offered everywhere. I could talk on the topic for days! **I feel strongly that the use of gamification will continue to spread across the industry in the coming years.**



Editor's Note



After speaking with Robert, **it's clear that the journey from land based to online is not without its hurdles or challenges**, especially when **considering the increasingly stringent regulatory environments** operators now occupy.



As Robert puts it, **digital transformation is not to be taken lightly** and its **paramount to choose a technology partner that understands your existing business, local regulation and technical guidelines** so that they can **provide the right mix of managed services**.

It's also important to note that the **success of this journey is not solely reliant on decisions made by mid management** but it's actually **essential for the driving force of the business change to originate from a member of the C-level with heaps of passion for the journey**, that can then be trickled down throughout the company!

Has the Covid19 Pandemic made it easier to convert land-based players to Online?

Marcel

If we look at the people we know, I think **the Pandemic changed us all** a little bit.

The **population overall** got **more familiar with technology** and how to use it.

A lot of **land-based players**, for the first time, **started to use an online casino** because there was no chance to go to a land-based casino. **So yes, there has been an impact** on the population in general, **which has made it easier to have new players who haven't played in an online casino before.**

Henk

I never believed that **pre-pandemic this was actually a challenge**, at least for us. **As a player** there are just **so many benefits when it comes to online gambling**, in comparison to land-based betting. I do **understand that a land-based player might not have the knowledge, experience or trust levels** with an online casino. It can be quite a hurdle to deposit, or just to validate, but I think **that's where the combination of bricks-and-mortar**



combined with online comes in. This is where the casino staff of a retail operation can assist – and should assist.

Looking at the longer trends in retail, I think that **online and offline have always been empowering each other.** I think the **pandemic has accelerated the inter-change.**

Was it that hard before The Pandemic? No, I don't believe so.



Are there any instances where it's beneficial to convert from online to land-based?

Marcel

Yes, for sure!

I think **this is a very interesting topic** and somehow is **overlooked in many cases**.

If we look in a casino today, **many casinos have poker**. I believe **we would have no poker rooms in casinos if we hadn't had the online poker boom of 2004 and 2005**. That **enabled a large section of the population to learn how to play the game**, who wouldn't have had the courage just to walk into a casino and play in a group setting or try the game for the first time in a group setting.

I think this can be very similar,



if we do it right, for land-based casinos. **In many markets, only a very small percentage of the population actually visit casinos**, and if I asked my friends who are not visiting, why, **most of the time they'd respond by saying it's because they don't know how to play the games**.

Having the **opportunity to try these games at home**, and then going to try the casino once you know how it works, is a **huge opportunity for land-based casinos** businesses in general.

We did some trials where we **invited online VIP players to a physical casino**. The VIP manager invited them. **Most of them had never been in a real-world casino**. They were taken to see the gaming floor, and most of them just loved the casino atmosphere. Previously, they just never had the courage to go in. **Furthermore, they are now coming back – and this is very interesting**. The best part is, with the VIP players being able to connect with the VIP Managers, **we were able to talk to them in person and this led to a tripling of player lifetime in the online casino**, which is just amazing! **An extended lifetime of a VIP player has a huge impact on margins**.

So, **I believe it goes naturally together** and if there is a market **where this is possible**, this **should be done**.

Gavin

We don't run casinos. But we do have 1,400 land-based shops up and down the UK. **At the start of the pandemic, we saw a lot of our shop-based customers switching for the first time to our online collateral** because they had to. Clearly, **some of them have gone back to retail**.

But **as we can see from trackable data**, if a customer is using both our **websites and shop the value to us increases almost exponentially**.



How easy is it to leverage your CRM system to cross-sell products at scale across multiple channels? What are the key challenges involved?

Henk

Let's first talk about the **key challenges involved** in a multi-channel marketing mix where you want to cross-sell.

I think a **challenge** that **marketers often overlook is to find the correct number of advertisements that you can deliver to a consumer** without being disruptive, annoying, or any other negative experience that the consumer might have towards the brand.

So, **with a multi-channel marketing mix**, it's **very important to use your CRM platform** to an extent where you can **assign how often a consumer should be targeted within a period of time**. This is **definitely one of the big challenges** that is **often overlooked**.

I think **another big challenge** when you implement a multi-channel marketing message **is to determine the channel at which the consumer reacts most positively** for your business.

You **need to see and analyse** what **consumer behaviour** will be using every channel.

Higher deposit amounts, positive frequency play time, reactivation, where one channel might be really great to promote a sports match; **it's very important to see which channel works for which goal or objective**. I think it is **key to keep in mind what the interests of the consumers are**, where they are based and what sports they tend to watch.

The more you know about your consumer, **the easier it is to leverage your CRM system to cross-sell products at scale**.

From our data we definitely see **it's easier to have a casino player go to sports betting rather than the other way round**. But then again, it always depends on what message you send. If, for example, you have a tournament or other events, it definitely helps to cross-sell by upselling. But **cross-selling definitely is about what message you have, and what is there for the consumer**.



We must always look at **the consumer first and ask what is the benefit for the consumer** to actually try this new product or service that you're trying to offer?

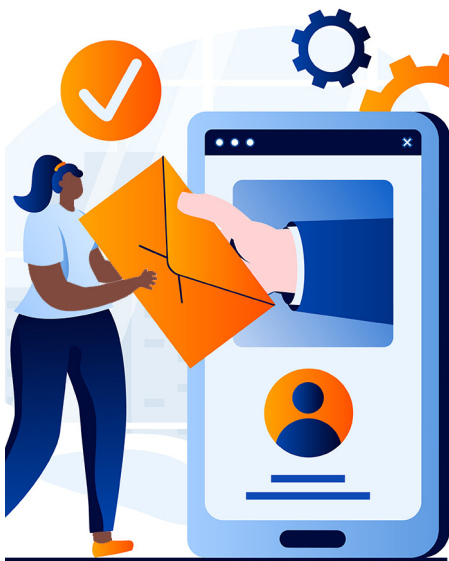
Arjan

If you look at consumer behaviour, even within the land-based environment, **a player who likes to play slots is not by definition a player who you can also attract to go and play table games**, because the emotions are different. Things are different, the win plan is different.



There's so much difference between slots and table games alone. Sports betting is literally a completely different ballgame with long odds, and **so upselling is definitely the best strategy** in this case.

I believe in testing and doing offers with cross-selling, but **I still am looking for the best case scenarios** where groups of people playing sports betting are now playing slots as well. But **I've not come across this yet**.



Gavin

I think that there is, in our industry, a 'home baked' truth that people think they can cross-sell from sportsbook into gaming. **But it's very, very challenging.**

I think that's because we've **traditionally thought about those two verticals as very different**. On the whole, they do **provide very different emotional benefits** for our



customers. **Yet the mistake that we often make is thinking that we can get a gaming customer to become an expert sportsbook customer in one simple step.** If we step back and look at the emotional response people have to gaming versus sportsbook, we find it's far easier to get our gaming customers to think of, and consider, sportsbook products that are more about large democratised international events. It's far easier for me to get a gaming customer to place a bet on the Women's Euros, for example, or the World Cup, or Cheltenham, or the Grand National.

However, I probably can't get them to place a four stage Acca on a rainy Saturday afternoon in February in the English cup! That's because **that's too complicated and difficult.**

It really is about stepping back and thinking about customers and their emotional response to what you've got to offer them.

Don't fall for the trap of believing everyone's an expert in everything that you offer.



What are the most effective ways to retain players? Is it gamification, or maybe a hybrid loyalty programme?

Gavin

When I joined this industry, I was amazed at how everything is a copy of what the next person is doing.

When I went to my recruitment team and said 'I want to hire people who have never worked in this industry before', they couldn't believe it. As a result of that, **we've got marketing teams**, who've all worked in different brands of the industry, **all doing the same thing as everyone else.**

This results in customers not being able to tell the difference between brands.

I'll never forget when I used to work on the *Nectar* cards product in the UK. ***Nectar* is a multi-retailer loyalty card mainly used for grocery shopping.** I had little **old ladies in focus groups** in their 50s and 60s who **used to tell me that they had *Nectar* cards for a very specific reason.** They'd use one *Nectar*

card for six months and then stopped using it because then they get lots of offers from their supermarket and they switch to another and do the same thing again. **If little old ladies in the UK can work that out about their grocery shopping, then people who are interested in gaming can work that out about gaming companies and their promotions.**

The average number of accounts customers have is rising, and that's really because we're all failing to do anything substantively different. I think what we all need to be doing is 'think beyond the bonus'.

I think **we need to be thinking about what content we've got that we can engage customers with**, what expertise we've got that we want to share with them and, perhaps, what expertise they've got that they want to share with each other – like SPK does in the UK.

I believe there's going to be a point very shortly where someone discovers that point of difference and then wipes the floor with everyone else because we are all guilty of doing the same as everyone else – and we need to stop it.

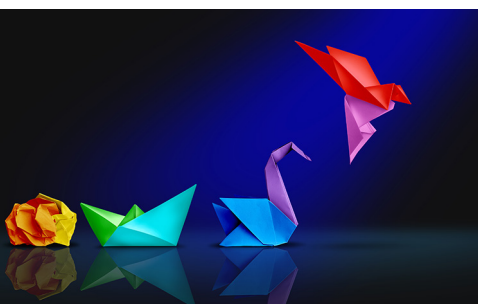
Marcel

Gamification is, in my view, just a kind of a placeholder for something we haven't found to replace the bonus.

We are all stuck with this base level CRM that has existed for many years, **which always does the same thing**, focusing on optimising the distribution of bonuses.

When we talk about CRM, I think we need something that supports us, not only in marketing messages, but also in personalisation.

If we talk about different channels, like land-based and online, **we need to really combine that. We need to come to a place where we really can focus on the customer**, know what they're doing in the land-based casino, also in the online casino, **and have more than just a boring bonus promotion** that we offer them, **developing a system** where we can help them **to maximise enjoyment.**



Gamification, it's been a bit of a buzzword in recent years in industry. Do you think we've realised its full potential yet in the industry? If not, why not, and just what is gamification in your opinion?

Gavin

I don't think we've realised its full potential at all. And I don't know why we haven't.

But for example, **I knew exactly the five or six actions that my best customers take within the first 30 days of registering** with William Hill.

One of the things that **we're doing right now is experimenting with gamifying and stimulating these behaviours** across our base **to see if that makes a difference to how many of those customers end up as good customers.**

I think it's **really interesting to think about gamification from a safer gambling perspective**, as well.

We mustn't forget that our customers are loyal because they enjoy playing and if we can give them that playful experience in different aspects of what we do or what we want them to do, then I think it should bear fruit. One of the key reasons we haven't done that yet, is because **it depends on using data in a different**

way and only recently have technologies, like moveable links, **allowed us to do things and weaponize our data in a way that's meaningful for customers and profitable for us.** But there's still a long way to go.

Henk

I think **it would be extremely ignorant to think we are at our full potential** with gamification. **I truly believe in the concept of gamification** and I am a gamer myself. In the early days, nobody knew it would become this big and create the largest margin of profits.

The mobile gaming industry is bigger than the PC and console market combined, largely due to their popular methods of gamification.

These **gaming companies know how to make money on games**, and this is **something** that is **severely lacking in the iGaming industry.**

In iGaming, gamification is limited to only being used within games or, at most, a 'lucky wheel' type feature – **and this is not enough.**

As an industry, we have only just scratched the surface and we're nowhere near our full potential.

Arjan

With topics like this, **I look at the issue from a neuro-psychotic perspective:**

gambling triggers the release of dopamine in the brain, **a chemical reward for risk taking. But gamification triggers the release of Oxytocin**, which is a happy hormone. **This means that the two concepts are actually very different**, and satisfy a separate set of individual human needs.

This being the case, I think **only a very limited level of gamification can be suitably matched to the iGaming customer experience and make a significant difference in player engagement.**

Most other applications of gamification are not actually going to be relevant for the vast majority of the gambling audience because it doesn't trigger the right neuro-psychotic reactions.

What impact will increasingly strict advertising regulations have on the way you're able to utilise your CRM system? What are the most effective strategies that operators should adopt to ensure continued growth in engagement, while remaining compliant?

Arjan

In the Netherlands, recent regulations have indeed caused much stricter limits on advertising. We seem to be following an Italian style model, where any form of advertising is completely prohibited, which is very challenging for operators. It's so strict that even land-based casinos aren't allowed to put the word 'Casino' above their doors!

So now operators will have to be increasingly reliant on their database and effective use of CRM systems.

The major new international brands that are now entering the Dutch market, such as *bet365* and *Unibet*, are very good at this.

This means that any operators already in the market that are not fully equipped with these tools and have previously relied heavily on purely advertising for player engagement, will have a very hard time.

Unfortunately, I believe that

this will also, inadvertently, boost the badmarket.

Henk

Firstly, it's important to mention that gambling regulations are a good thing – and something that our industry needs in order to keep players protected. However, I believe the Dutch regulations may have taken things a step too far and they still need to find the right balance to avoid opening up opportunities for the badmarket to flourish.



The Regulator recently stated that they are aiming for 80 per cent market channelisation but I think at this current point that would be very difficult to achieve.

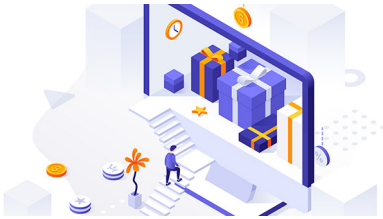
Probably the most effective strategy for this type of market condition has been best demonstrated by *bet365* because they have great content creation and are using this as a powerful tool to engage audiences instead of normal advertising.



They are producing great interactive content, leveraging platforms like *Twitch*. There is a very big demand for this type of content on the market right now and this is a trend that will continue to pick up momentum, especially in strict advertising markets such as the Netherlands.

Gavin

We operate in the UK where we have some of the strictest gaming legislation in the world.



Our approach has always been to lean into that, making sure that we can have a voice at the table but also ensuring that we are always at the forefront of customer protection and stopping our customers from being exposed to any illegal communications.

Our mantra has always been 'If in doubt leave it out'.



But we are also very lucky because, unlike many other operators, we have over 1,400 shop windows around the country that we can also use to promote our products and communicate with the public, which is a massive bonus.



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EDITOR'S CONCLUSION

Delivering a multi-channel marketing mix that achieves balance and delivers a positive experience to consumers **will increase brand loyalty and lessen churn.**



It's **also critical for operators to identify strengths of channels** among different games, all **through a lens of personalisation.**

Customer behaviour is telling us that **finding common ground** within your channels **remains**

In essence it's **key to find common ground when pursuing that all-important cross-sell.**

All of these CRM elements can be nicely packaged to the gamified consumer. This sector of your customer base will see the benefit and likely be triggered to try another product.

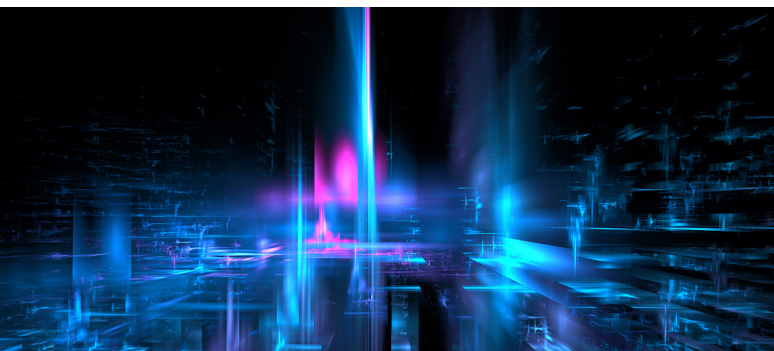


tricky – and this is where profiling and personalisation comes into its own. **Identifying points of conversion and behavioural elements** that sit across multiple channels **will be critical to a successful Omnichannel approach.**

Consumer behaviour within the land-based environment is key to developing profiles.

Slot players tend not to convert to table games and have a totally different persona to sports bettors, for example. Going deeper into the player persona will surely take you 'beyond the bonus'. However, it **can still be convincingly argued that the gaming industry has only scratched the surface of gamification.**

Meanwhile, **it's important that the gaming industry must remain compliant, and go even further by actively encouraging positive play.**



In conclusion: Weaponizing data to create meaning; **cross-sell with intent;** and attempt to **service your customers down a personal channel.**

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