

The gaming and gambling landscape

“New platforms – New Trends in Gambling. How to Target New Audiences?”

SNSUS-conference may 2013

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Norsk Tipping AS



Thank you!

Thank

you!



NORSK LIPPING

VAREMOTTAK →

The gambling and gaming industry is a

MASSIVE

industry


Global gambling
revenues were
estimated at
\$430 billion in 2012



And it's steadily increasing

**\$500 billion
per 2015**



A grayscale map of Europe with Norway highlighted in a vibrant green color. The rest of the continent is shown in a light gray tone, providing a clear visual contrast for the highlighted country.

To put this into
perspective

equalling Norway's total GNP

Gambling revenue by continent



LOTTERIES \approx 28,4% of global gaming revenues
 \approx \$122 billion



CASINOS $\approx 27,7\%$ of global gaming revenues
 $\approx \$117$ billion



GAMING MACHINES

≈ 22,0% of global gaming revenues
≈ \$94,6billion



BETTING \approx 12,7% of global gaming revenues
 \approx \$54,6 billion



Global gaming revenue

Land based
≈ \$390 billion

E-gaming
≈ \$40 billion



91%

9%

Number of all European citizens who have participated in some form of gaming or gambling **at least once during their life**



≈ 9 out of every 10 people

Number of European citizens who participate in gambling and gaming activities **each year**



≈ 7 out of every 10 people



Enough with the
statistics already!

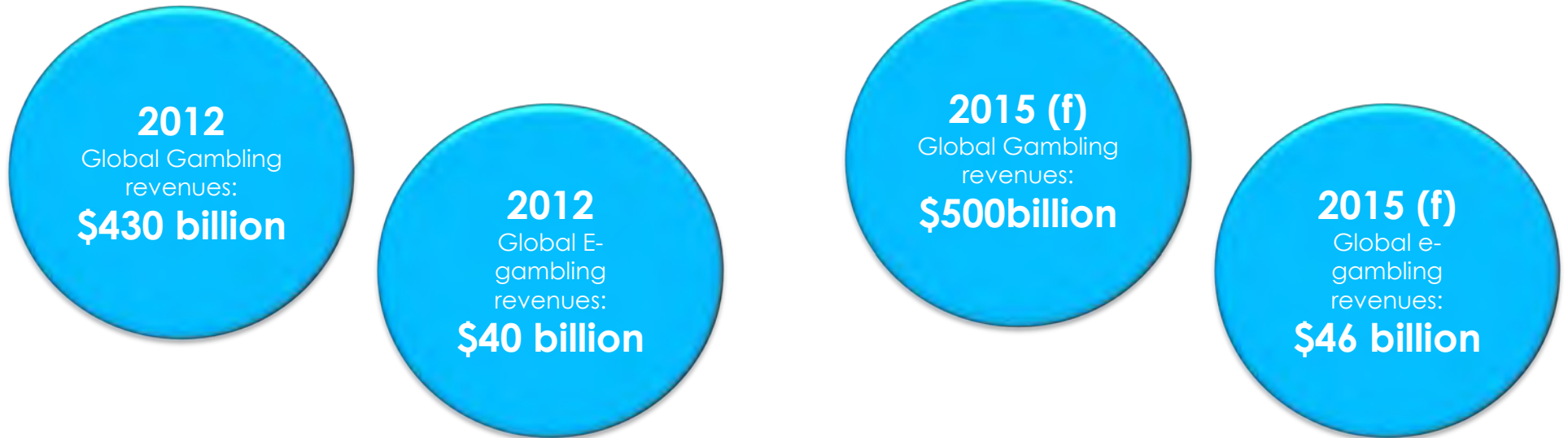
Ok....

...but lets just agree

This is a **MASSIVE** business....

2012

2015 forecast



...and it will grow even **BIGGER!**

No wonder private
investors want a
piece of the action

"If you want to make money in a casino, own a casino"

Steve Wynn

American business magnate and casino entrepreneur



Online gambling is where the money is according to The Sunday Times Rich List



Gambling industry figures accounted for 10 entries on the Sunday Times Rich List 2012

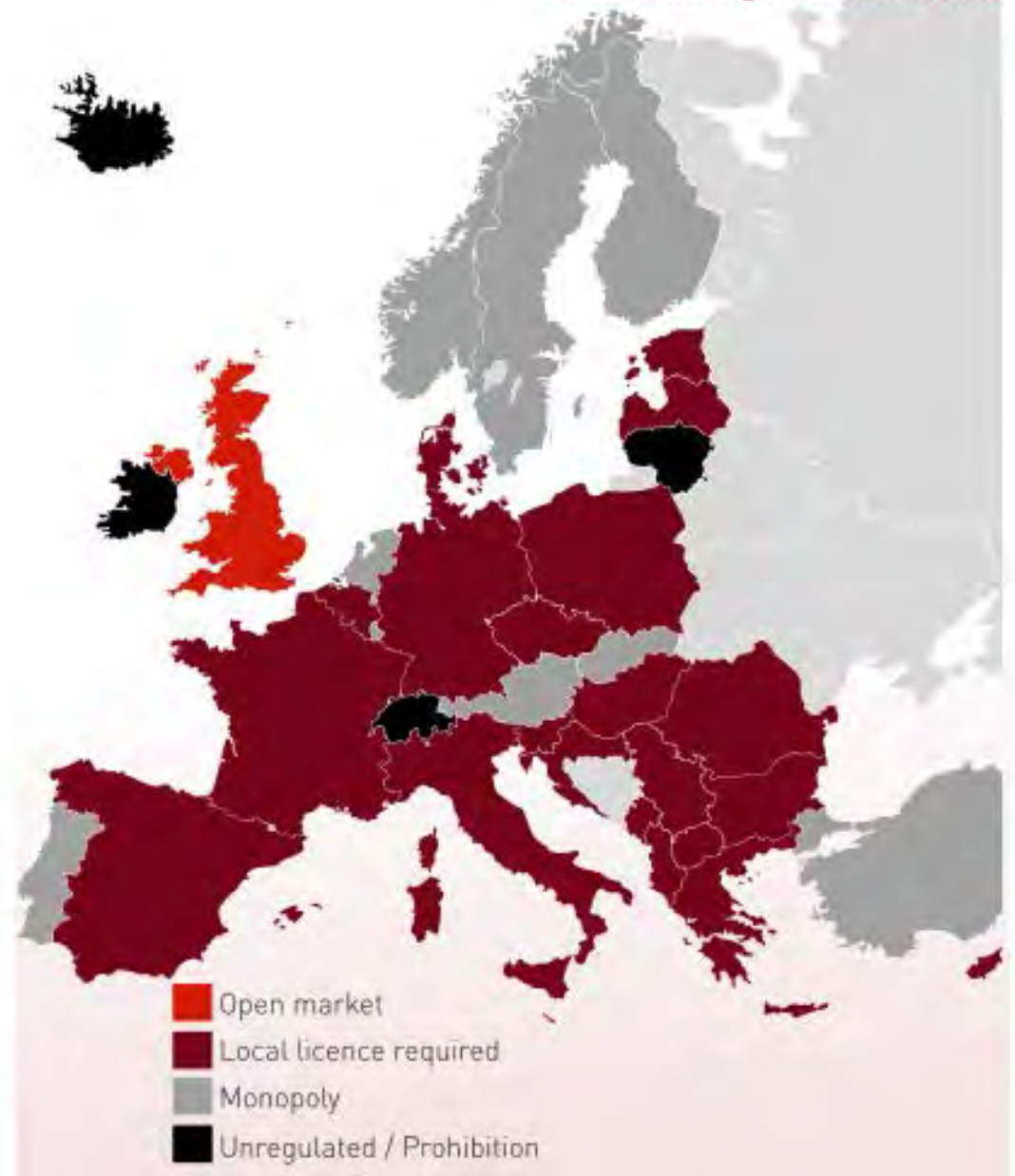
The *Sunday Times Rich List* is a list of the 1,000 wealthiest people or families in the United Kingdom



Founders and owners of Bet365, Denise Coates and her father Peter Coates, are listed with a fortune estimated at £800 million, fast closing in on becoming Britain's first gambling billionaires.

Most major markets in Europe are now open for competition

Local licence models has quickly become the dominating practise



The gaming and gambling business...

*...is definitely a
business in change*

Dominating forces and areas of change:

Changing Context

1. *From Bad Guys to Serious Business*
2. *Get BIG or get EATEN*
3. *Media corporations getting in*
4. *Social media gambling – a GAME CHANGER?*
5. *USA's e-gambling regulation*
6. *EU's stance gambling regulation*

Changing Content

7. *Monster money*
8. *Instant Gratification*
9. *Skill = thrill*
10. *"Moneytainment"*
11. *Gamification*

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Lets start of with

Context

1. From “bad guys” to “serious business”

From



To



We used to compete against these guys...

Several small .coms

Little or no transparency

No industry standards or accreditation programs

Little or no control concerning money laundering, player protection, fraud and match fixing

Websites on Malta or Gibraltar with vague and hidden ownership structures





Now we compete against these guys...

Big businesses listed on international stock exchanges

Local licences in most major markets - *dot.country* instead of *dot.com*

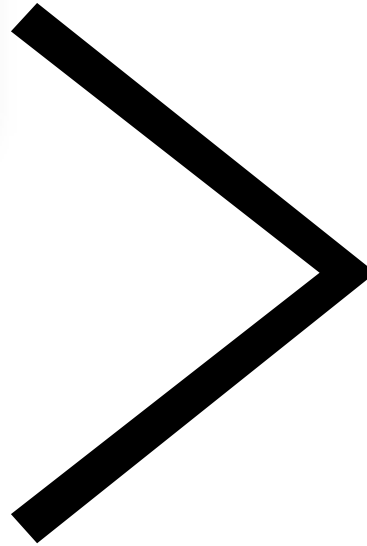
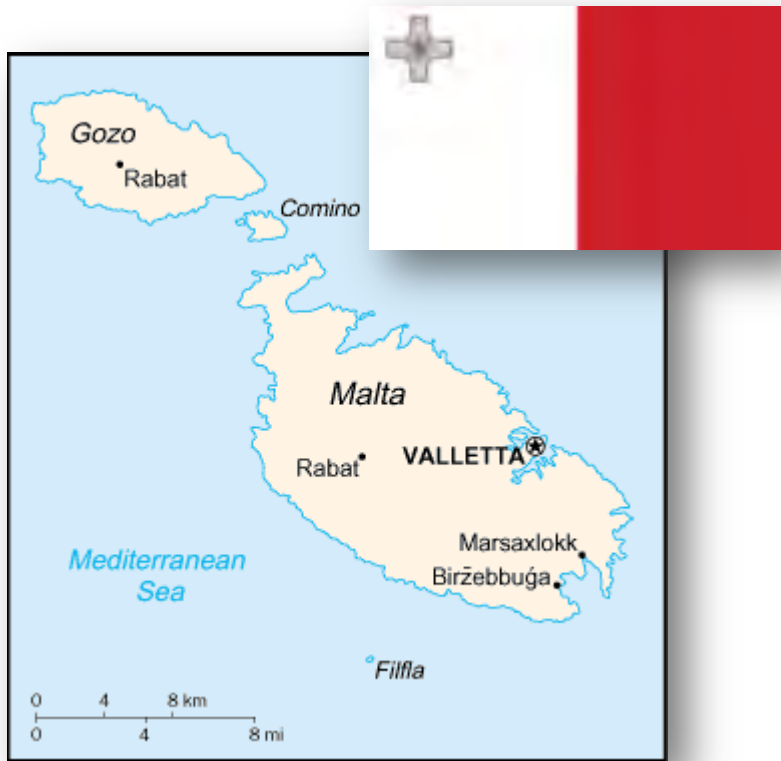
Standardised reporting and financial transparency

Operational practice requirements and standards

Player protection standards and requirements

Staff training requirements and standards

Cross company collaboration to fight fraud, match fixing and money laundering



≈ 400 Norwegians
working in the gambling
industry in Malta

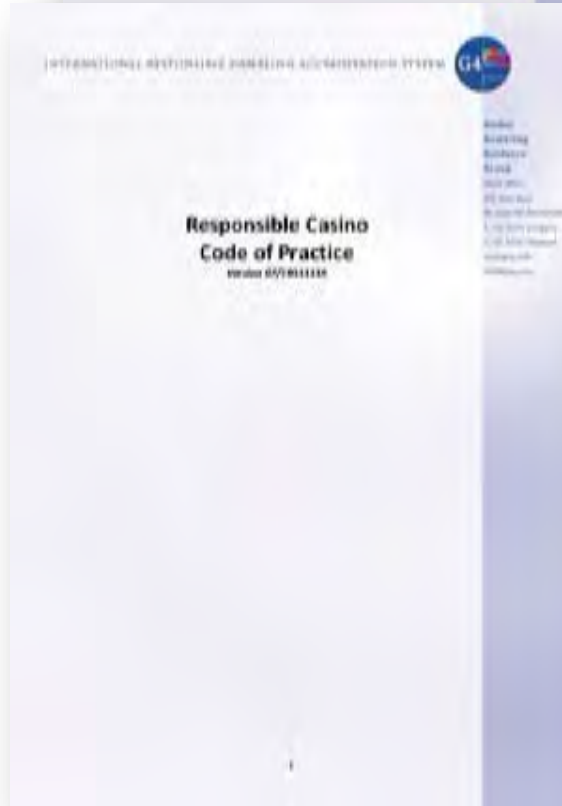
≈ 370 employees
at Norsk Tipping

The e-gambling industry has joined forces and taken measures to “clean up their act” in order to look good for local regulators and investors...



One example of industry standards

“Global Gambling Guidance Group”



Some of the private operators' responsible gambling measures are now starting to look good, and they appear to be well trained and conscious when it comes to player protection issues...

However, some questions still remain unclear:

...how good are these standards and requirements?

...why so little transparency concerning effects?

...what about ethical standards and codes of conduct?

...why are so many of the responsible gaming features voluntary instead of mandatory?

And most importantly:

...when push comes to shove, are shareholders really willing to place player protection above money?

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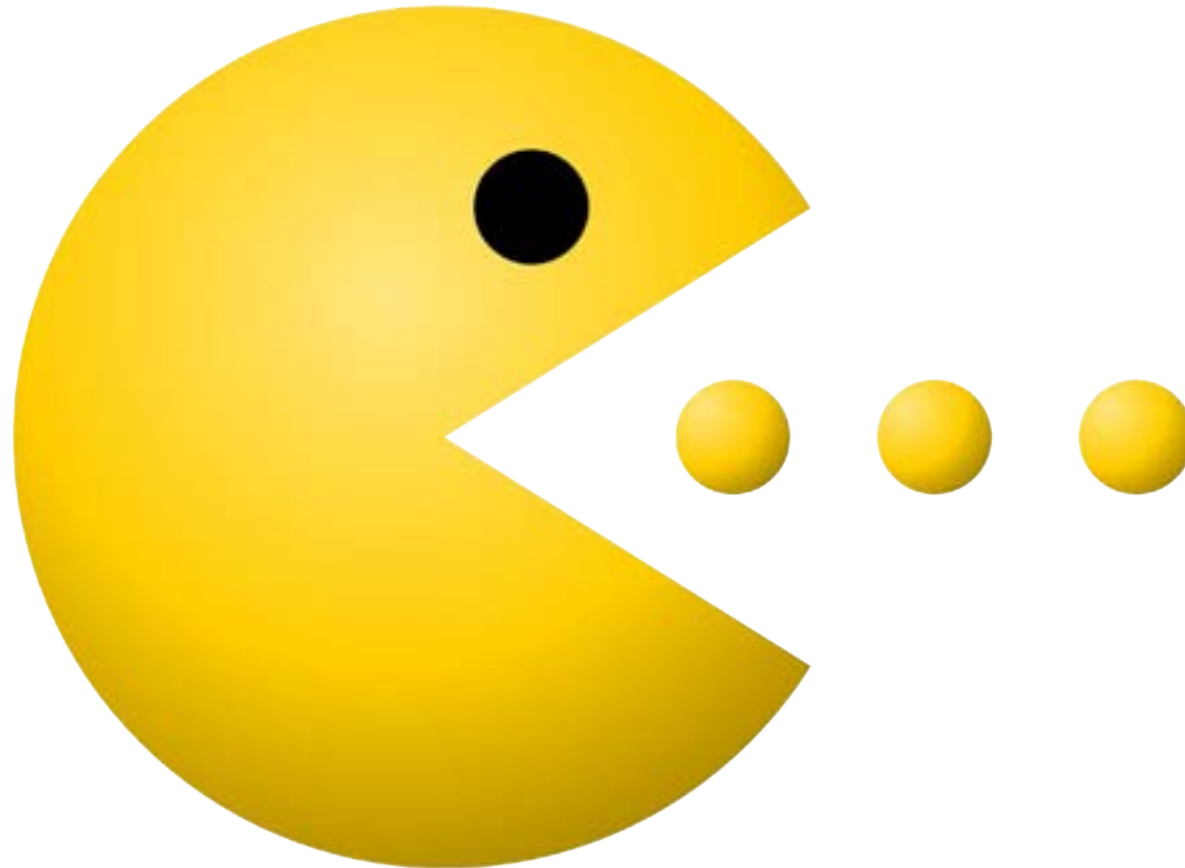
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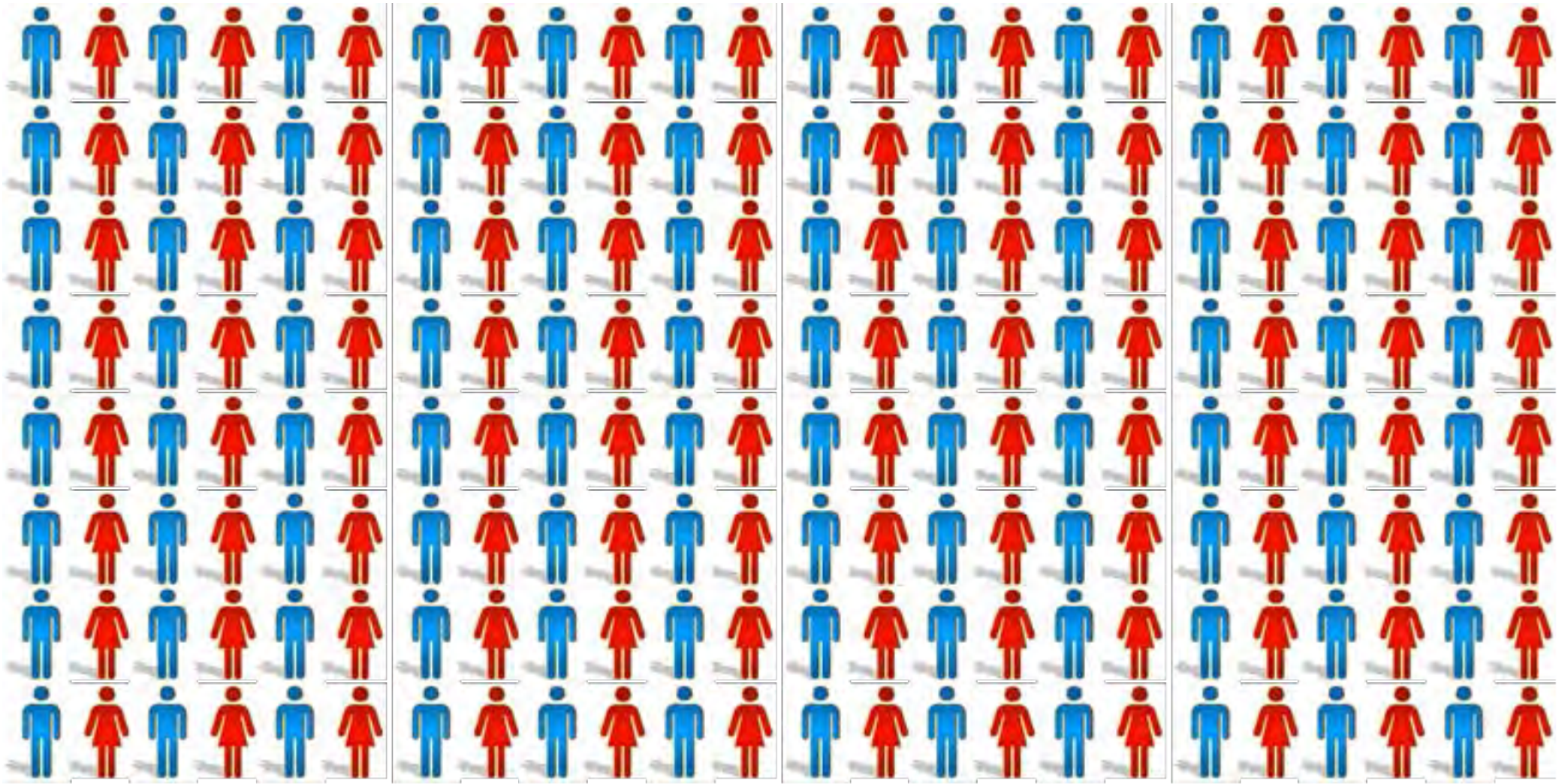
2.

Get BIG, or get EATEN

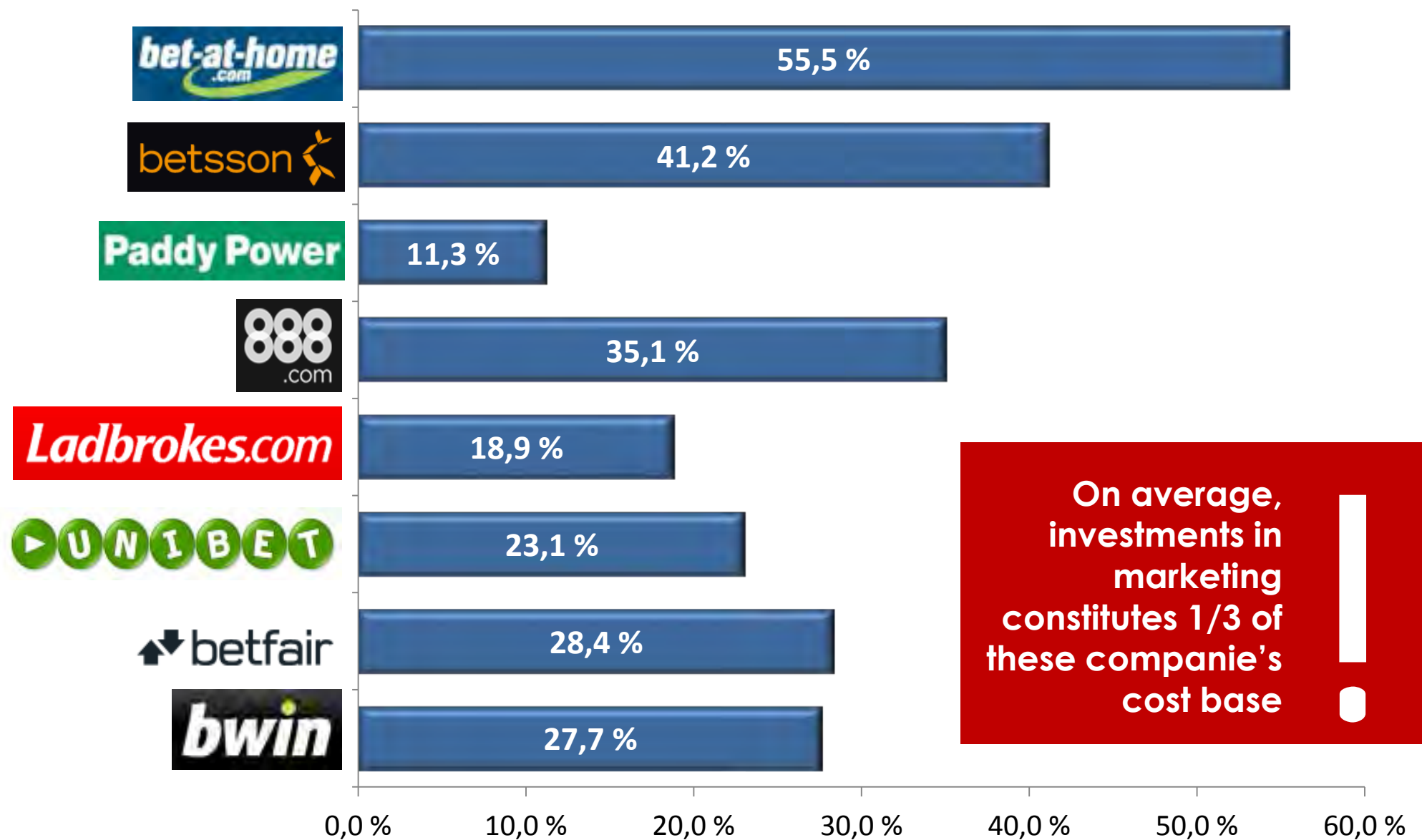
- intensifying competitive environment



*In the gambling industry, **NUMBER OF CUSTOMERS** and **FREQUENCY OF PURCHASE** is everything*



Marketing expenditure in % of Gross Gaming Revenue (GGR)



In 2011 there were

140 295

commercials for gambling on

Norwegian

TV-screens

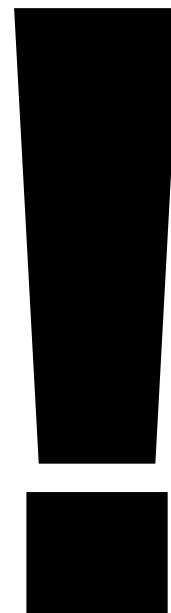
This
equals
37 DAYS

of commercials for gambling during a year

Or, on average:

384

commercials
every day



77 % .com

Norsk Tipping **17** %

Norsk Rikstoto **6** %

The 24 companies and websites behind gambling advertisements on Norwegian TV in 2011

7 Red.com

Ben's bingo.com

Bet24.com

Betsafe.com

Betsson.com

Bingo.com

Centrebet.com

Comeon.com

Eurolotto.com

Extraspel.com

Fulltiltpoker.com

Maria.com

Megascratch.com

Mrgreen.com

Nordicbet.com

Norgesautomaten.com

Norgesspill.com

Norsk Rikstoto

Norsk Tipping

Norskelodd.com

Pokerstars.com

Unibet.com

Vinnstort.com

Yessbingo.com

Champions League final Wembley 25.05.2013



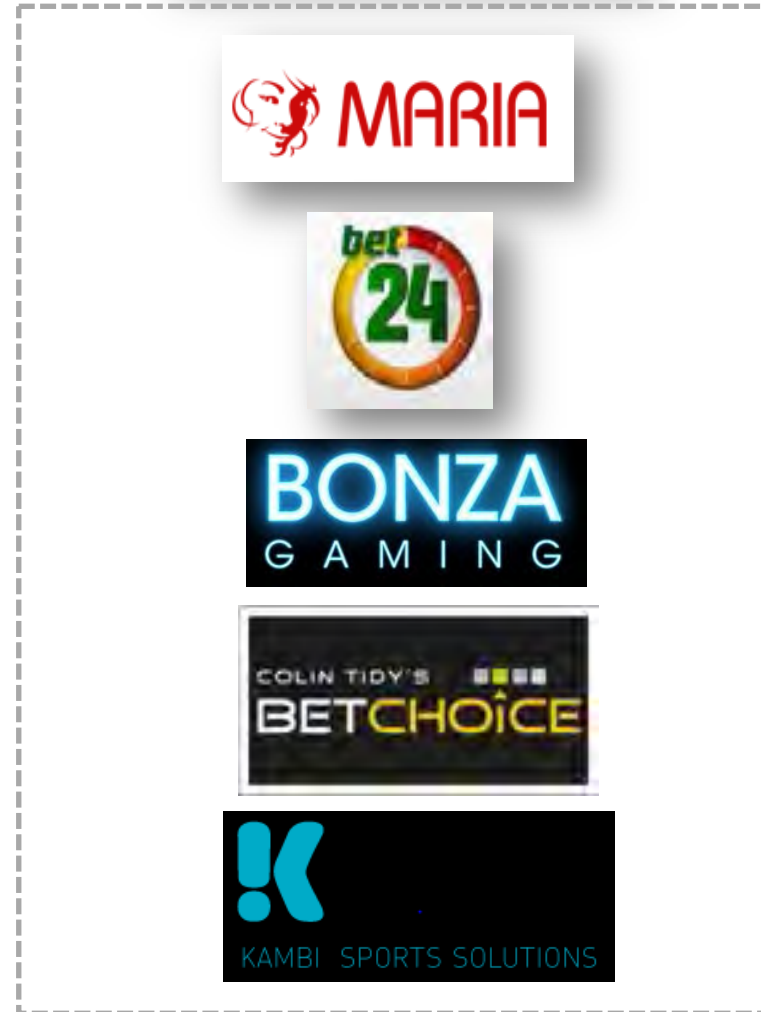
Commercials during
breaks, half time and
post match analysis



M & A

Mergers And Acquisitions

Consolidation (two examples)



Why this
eagerness to
get bigger



3.

Media corporations are getting in...



Gaming and Gambling adding
value and financing content

When Denmark opened for local licences, three MEDIA CORPORATIONS quickly entered the playing field



Bonnier Group (Bonnier Gaming Malta Ltd)	Yaybet.dk Yaycasino.dk
Ekstra Bladet Spil AS	Ekstrabladetspil.dk Ekstrabladetcasino.dk Ekstrabladetbingo.dk
Aller Media	Casino licence, but not up and running yet



Home Register Forgotten User ID or Pin Help

sky BET sky POKER sky VEGAS sky BINGO

Bank Holiday £5k Giveaway
Play at Sky Vegas for the first time this Bank Holiday for the chance to win a £5,000!

£ Sky Bet Loyalty Rewards
Add 250 Sky Bet points towards getting money back for every £20 of your Sky Bet on Sky Bet.

Home

Top Sports
Football
Horse Racing

Next Horse Races
2:25 Kenilworth
2:40 Ketto - Better Pla...
2:45 Langchamp PROX...

Quick Links
Champions League Championship
French Open Men's
French Open Women's

A-Z Sports
American Football
Badminton
Baseball
Basketball
Boxing
Cricket
Cycling
Darts

Join Now and get your **£10 completely free** bet - instantly!
Join Now

VEGAS Instant Play
Play Now

IPL Price Boosts
Suresh Raina to top score for Chennai - 7/2 from 100/30

Scorecast Boosts
Check out all our latest Scorecast Boosts here

Alex's Tip of the Day
Just the Judge in the 3.55 at Curragh - 5/1

LIVE On TV 7 Football 9 Cricket 1 Golf 1 Tennis 10 All

On TV	Win	Draw	Win
England v New Zealand	2/1	11/4	33/1
BMW PGA	Current Favourite Lee Westwood 1/2		
Monaco GP Race Live	Earliest Favourite Nico Rosberg 2/9		


Fullant Internet | Beskyttet modus Av 100%




sky BINGO  New Bingo App
Download on the App Store

London | 0203 330000 |  

London (London) | Credits: £10.00 | | | |

Home
Promotions
Schedule
Play Bingo! 

YOU CHOOSE TUESDAY
£500 Lucky Seven Roll-On Bingo vs £500 Last Chance Saloon Bingo
[LEARN MORE](#) [JOIN NOW](#)

90 
ANYTIME
Maximum Price
£10,000.00
[Play Now](#)

Play Great Games at Sky Bingo

Dear Winners: "I won £19k from a 77p bet. I didn't think it was possible!"
Bryne, Nottinghamshire | £19,000.00

Offers & Promotions
New customers - Play £5 get £10 FREE
Daily Triple Play
Become a fan of Sky Bingo on Facebook

Bingo Gems
Daily Bookies Guaranteed Games
Lucky Numbers Bingo

Internet | Beskyttet modus: Av | 100%



skyBET skyPOKER skyVEGAS skyBINGO

sky VEGAS online & on mobile Payouts in last 7 days: £22,943,922.91

Search 250+ games: or [View all games A-Z](#)

- Home
- Casino Promotions
- roulette
- Blackjack
- Live Casino
- Mobile Casino
- Slots
- Table Games
- Best Win Games

Unlock Peggle Masters and win a share of £2500 PLUS other great prizes!

[More info](#)

Welcome Bonus Peggle Master Sloty Gifts

ROULETTE

Also on mobile

BLACKJACK

Also on mobile

LIVE CASINO

Peggle Slots Master

Win a share of £2,500

[More info](#)

Favourite Games

Dark Devil

Also on Mobile

Trigger the Dark Devil Bonus!

[Info](#) [Play Now](#)

Popular Games

Wild Gambler

Also on Mobile

Become the wildest gambler in Africa!

[Info](#) [Play Now](#)

All the Best Games

Rainbow Riches

Also available on Sky Vegas Mobile Casino

[Info](#) [Play Now](#)

Jackpots

Six Million	£592,127.19
Millionaire Club	£546,247.25
Wizard Dead or Alive II	£203,972.66
50x Hot	£94,199.98
Deal or No Deal Slot	£199,555.84
All Jackpots	£198,119.02

250+

Fullstet Internett | Beskyttet modus Av 100%



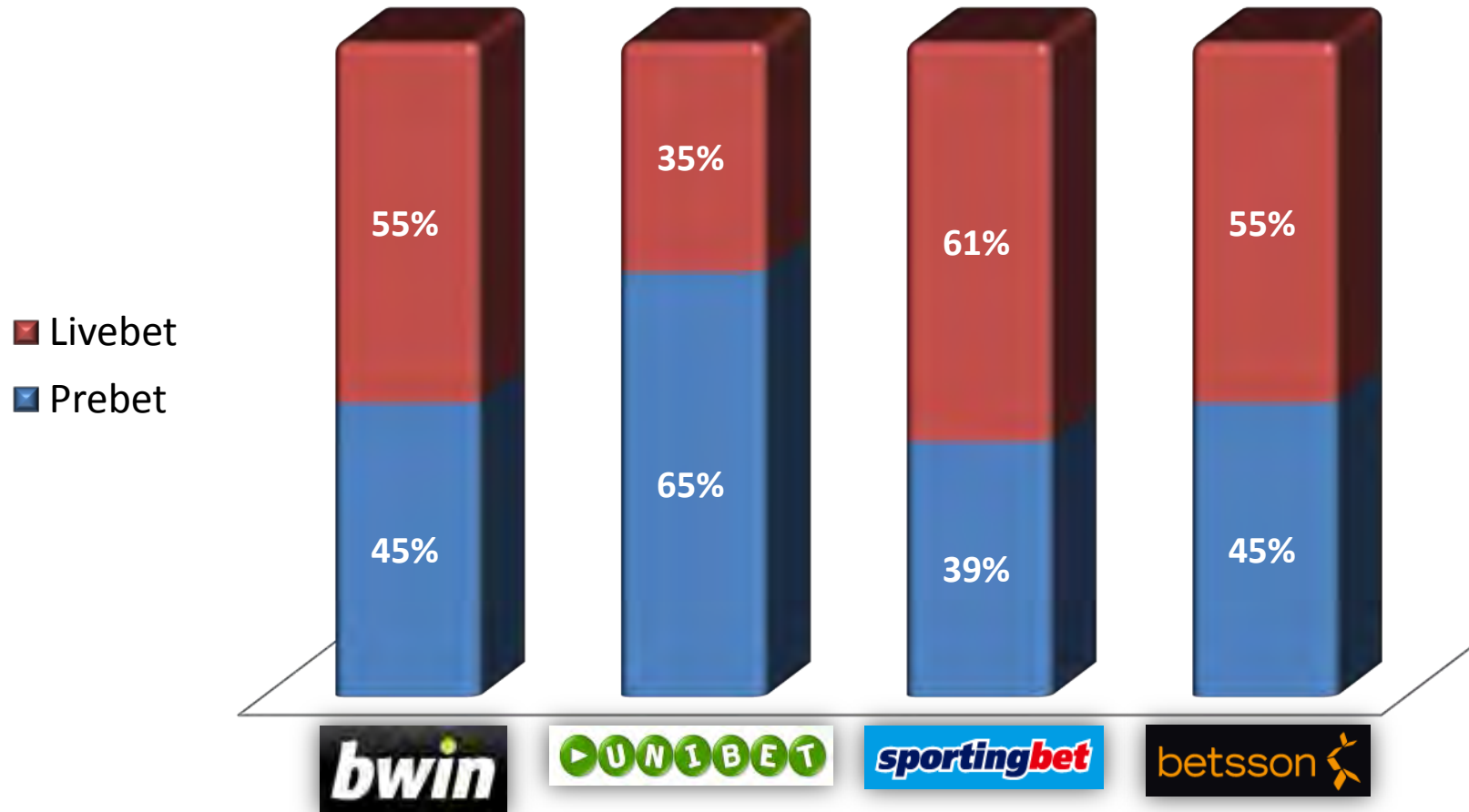
The screenshot shows the Sky Poker website interface. At the top left is the 'sky POKER' logo and a 'DOWNLOAD' button. A navigation bar contains links for 'sky BET', 'sky POKER', 'sky VEGAS', and 'sky BINGO'. Below this is a search bar and a login section with fields for 'User ID' and 'PW', a 'Remember me' checkbox, and a 'Log In' button. A main menu includes 'Home', 'Cash Games', 'Sit & Go', 'Tournaments', 'Community', 'Find A Player', 'My Sky Poker', 'Promotions', 'TV', 'How to Play', and 'Casino'. The central banner features the text 'Join Sky Poker' and 'Receive a 200% first deposit bonus up to £500 and £10 completely free'. Two large blue chips are displayed with '200% deposit bonus up to £500' and '£10 completely free'. Below the banner are two buttons: 'Join Now' and 'Find out more'. The 'Welcome to Sky Poker!' section lists three steps: 1. Register, 2. Download, and 3. Play, each with a brief description and a 'Register Now', 'Download Now', or 'Play Now' button. A laptop displaying a poker game is shown to the right. The footer contains 'Internet | Beskyttet modus Av' and a zoom level of '100%'.

Gambling revenue can be used to finance broadcasting rights for other attractive content, thus strengthening their positions as content providers

Gambling adds value and delivers engaging content in it self

People already place bets on TV-related content, so why not try to make sure the money stays with the content provider

Share of revenue – live betting vs. pre-betting (2010)



facebook

facts

World wide users: 1.11 billion as of May, 2013

Daily active Facebook users: 665 million

Average time spent per Facebook visit: 20 minutes

Average number of users playing Facebook games per month: 250 million

facebook

facts

World wide users: 1.11 billion as of May, 2013

Daily active Facebook users: 665 million

Average time spent per Facebook visit: 20 minutes

Average number of users playing Facebook games per month: **250 million**

≈ 35 million Facebook users each month according to Facebook statistics



zynga poker™
HD

 Login with Facebook

Play as Guest

We will never post without your permission.

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blog

[blog](#) [company](#) [zynga.com](#) [zynga.org](#) [careers](#)

104 blog in category [SMS, Tools](#)

ZyngaPlusPoker and ZyngaPlusCasino Launching for UK Players

Posted by [Betsy Coleman](#) on [July 2, 2011](#)

Starting tomorrow, players ages 18 and over in the UK can experience Zynga's first real money games ZyngaPlusPoker and ZyngaPlusCasino powered by twin.party, one of the largest and most reputable real money gaming operators worldwide. Launching the download and web versions of Zynga's real money games for play in the UK is an exciting move to bring players the real money games they have been asking us for. We look forward to launching our social versions of real money games for players on Facebook and mobile in the UK throughout 2013.



- ZyngaPlusPoker is an online poker room that offers UK players a wide variety of games and tournaments with buy-ins at every level.
- ZyngaPlusCasino brings players more than 160 slots games and a variety of table games to choose from including Blackjack, Roulette, Baccarat and Video Poker as well as the first-ever FarmVille themed slots game.
- Both ZyngaPlusPoker and ZyngaPlusCasino will offer players a host of welcome packages

We look forward to launching our social versions of real money games for players on Facebook and mobile in the UK throughout 2013.

<http://blog.zynga.com/>

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Latest Zynga Articles

[Using health and games](#)

Casino application

The screenshot shows the Zynga Casino website. At the top, the logo reads "ZYNGA CASINO" with the tagline "MADE FOR THE PEOPLE". A navigation bar includes links for "HOW TO PLAY", "PROMOTIONS", "TOURNAMENTS", "VIP & DEPOSIT", and "ABOUT". A large banner features cartoon characters around a roulette wheel, with a "PLAY NOW" button and a "TOTAL JACKPOTS £1,273,962.11" counter. Below the banner, a promotion states "GET £15 FREE UPON YOUR FIRST DEPOSIT!". A grid of game thumbnails is visible, with "AZTEC GOLD" prominently displayed. At the bottom, a section titled "CHECK OUT ALL THE GREAT PROMOTIONS AND EARN BONUSES" features four promotional cards: "SPIN TO WIN!", "THEY PLAY YOU WIN", "MYSTERY GIFT", and "FARMER'S HARVEST!".

Poker application

The screenshot shows the Zynga Poker website. The logo reads "ZYNGA POKER!" with the tagline "MADE FOR THE PEOPLE". The navigation bar includes "HOW TO PLAY", "PROMOTIONS", "TOURNAMENTS", "VIP & DEPOSIT", and "ABOUT". A large banner features a woman in a red dress holding cards, with a "PLAY NOW" button and a large "£15 FREE" offer. Below the banner, three buttons are visible: "Launch", "Sign Up", and "Play With Real Money". A row of four instructional tiles is shown: "WHAT IS ZYNGA PLUS POWER?", "GETTING STARTED", "DOWNLOAD & REGISTER", and "HOW TO MAKE A DEPOSIT?". The bottom of the page features logos for various payment methods (VISA, MasterCard, PayPal, NETELLER, Skrill, ecoPayz, Bitcoin) and a "Choose Safe & Fun" logo.

Examples of other gaming and gambling companies going social:

888.com

CROWDPARK

gameSYS

BONZA
GAMING

bwin.party

It's easy to understand why





Play Buy Coins Earn Coins Free Gifts Invite Friends FAQ

\$ 1,204 Buy 44 / 125 1 Back Go to

SPECIAL SALE: 00:14:54

Toll time, select a booth

Total win: 45

YOU WIN:
45
COINS
45 X 1 = 45
BONUS WIN X LINEBET = TOTAL WIN
**There was more trip ahead.
Maybe next time.**

SHARE

BACK TO GAME



Play Buy Coins Earn Coins Free Gifts Invite Friends FAQ

1,324 Buy 47 / 125 1

SPECIAL SALE: 00:12:16
Total 25 50

Min. Bet: 1 Max. Bet: 250
DUST

WINNING STREAK! YOU WON 3 TIMES IN A ROW!

Amazing!



Tell your friends now.

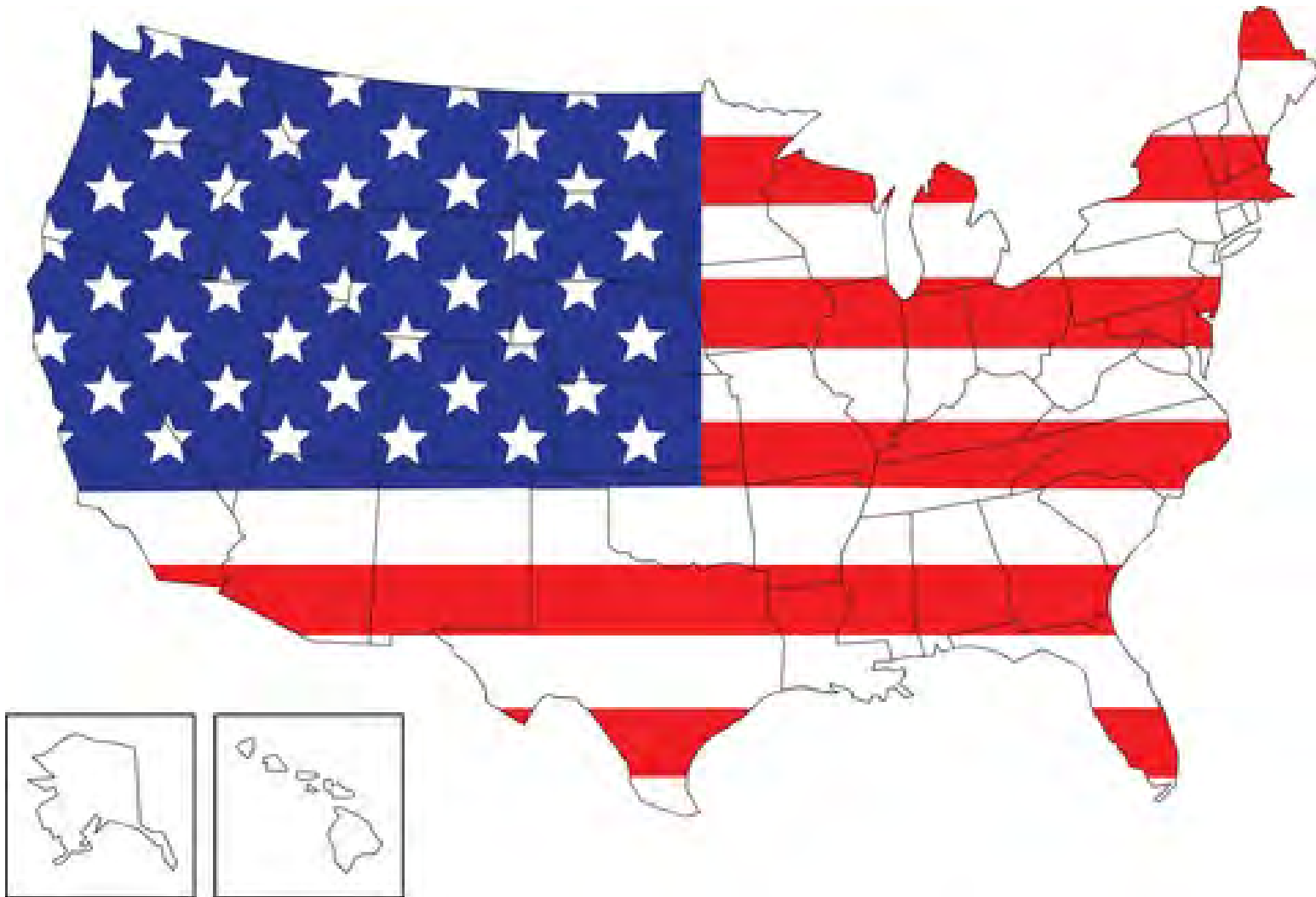
SHARE

Share free coins with friends

NEW GAME REDEY REDEY & DEAL

25 100 1

5. *USA's regulation of e-gambling – further deregulation?*



6.

EU's stance on gambling regulation



Then over to

Content

7.

Monster money = Attention



The worlds biggest prize pay-out

\$656.000.000

Divided between three players
March 2012, USA

And the biggest prize pay-out to a single player:

\$590.500.000

May 2013
(Florida, USA)



Europes bigges cash prize:

€161.000.000

Juli 2011 (won by a British citizen)



The biggest prize pay-out in the Nordic countries:

216.125.520 NOK

15th of May, 2013.

Won by a man in his 60s from Troms, Norway



The second biggest prize pay-out in
the Nordic countries:

215.000.000 SEK

27th of March 2010
(won by a man aged 50-60 , from Helsingborg, Sweden)



8.

Instant Gratification...



“On demand society”

Generation C

“The connected generation”

“The triple A generation”

...always on

...anywhere

...anytime

When I was a kid, this is what TV looked like...



NRK TV 1985

TV og radio idag

fjernsyn

09.00: Barne-TV.

«Den gongen je var lita.» 1. Julian rømmer. Else Frogner forteller om hvordan det var å være barn på en gård for lenge siden.

10.00: Undervisningsfjernsyn.

10.00: Nordens geografi. 7. Ishryter i Bottenviken. Komm.: Sigmund Groven.

10.30: Yrkesorientering. Signaler, strøm og spennning. Ved Marianne Wieser.

11.00: Den levende planeten. «Kysten». Det niende av tolv programmer om vår klode. Presentert av David Attenborough og Hans Chr. Alsvik. Sendt 1984.

11.55: Nytt fra tekst-tv.

17.55: Ettermiddagsnytt. (th.)

18.00: Barne-TV.

«Den gongen je var lita.» 2. Julian får Oline til å le. Else Frogner forteller om hvordan det var å være barn på en gård for lenge siden.

18.15: Henrys katt.

Britisk tegnefilm. «Sluk». Forteller: Katja Medbøe.

18.20: En fugl i hånden. (t.)

Svensk film om noen ungdommer som driver med ringmerking av fugler.

18.35: Sommertreff i Nevlunghavn. (th.)

Møte med høyninger og noen kunstnere, og om en rekkefabrikk som ble galleri. Ved Bjørn Rygh.

19.10: Tro og liv.

Sangevangelist Arne Aana.

19.30: Dagsrevyen.

20.05: Ungdomsredaksjonen.

Kluzz. Aktuelt månedsmagasin.

20.55: Maktkamp på Falcon Crest.

Amerikansk serie. Del 33.

21.40: Studio Nord.

Sjette program i serien der kvinner er hovedpersoner. Ved Jan Pedersen.

22.05: Kveldsnytt.

Ca. 22.15: Fotball

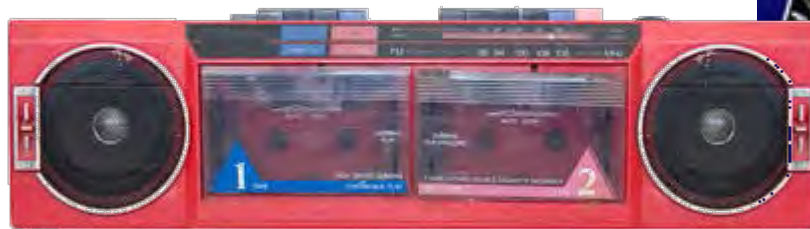
Bemifinalen i europacupen: Bayern München-Everton. Komm.: Arne Schjøen. Til 23.10.

...one channel, and if I wanted to watch TV at 18:35, I had to watch "Sommertreff i Nevlunghavn".

For my kids, growing up now, TV looks like this...



When I was a kid, this is what music looked like...



For my kids, growing up now, music looks like this...



Kids, old enough to gamble now, are faced with this...



Win on almost anything... From anywhere!

On the bus, at the game, in the pub or on the go – with Betsafe mobile the thrill is always at your fingertips. Imagine never again having to miss out on the action just because your girlfriend's parents invited you for dinner... Never again will you miss out on the action.

Pump your smartphone or tablet full of adrenaline-filled games and odds!

The advertisement features a smartphone on the left displaying the Betsafe mobile app interface with sections for 'Real Madrid - Barcelona', 'Premier League', 'Serie A', and 'Champions League'. The background is a dark, stylized scene with a soccer ball and various game icons.



What do you think will dominate the future development of games?

*Pick your numbers, and wait
until Saturday evening*



*Instant play,
instant result*

or..



9.

Skill = Thrill



What is skill?

- ...social skills and abilities
- ...knowledge
- ...calculating probability and risk
- ...tactical and strategic choice
- ...coordination / motoric skill



What does skill provide?

- ...engagement
- ...involvement
- ...prestige and status
- ...intensity
- ...competitive instinct

...the skillgames seen today are nothing more than examples of what's to come

And remember; skill is much more than poker!

A screenshot of a Google search page. The search bar contains the text "play skill games for real money". The search results are not visible, but the text "Omkring 34 700 resultater (0,36 sekunder)" is partially visible at the bottom left. To the right of the search bar, the text "≈ 35.000 results" is overlaid in a large, bold, black font.

Google "play skill games for real money" LOGG INN

Nettet Bilder Google Maps Mer + Innstillinger for søket

Omkring 34 700 resultater (0,36 sekunder)

≈ 35.000 results

A screenshot of a Google search page. The search bar contains the text "chess for money". The search results are not visible, but the text "Omkring 55 000 resultater (0,26 sekunder)" is partially visible at the bottom left. To the right of the search bar, the text "≈ 56.000 results" is overlaid in a large, bold, black font.

Google "chess for money" LOGG INN

Nettet Bilder Google Maps Mer + Innstillinger for søket

Omkring 55 000 resultater (0,26 sekunder)

≈ 56.000 results

A screenshot of a Google search page. The search bar contains the text "backgammon for money". The search results are not visible, but the text "Omkring 644 000 resultater (0,37 sekunder)" is partially visible at the bottom left. To the right of the search bar, the text "≈ 644.000 results" is overlaid in a large, bold, black font.

Google "backgammon for money" LOGG INN

Nettet Bilder Google Maps Mer + Innstillinger for søket

Omkring 644 000 resultater (0,37 sekunder)

≈ 644.000 results

A screenshot of a Google search page. The search bar contains the text "quiz for money". The search results are not visible, but the text "Omkring 20 300 resultater (0,19 sekunder)" is partially visible at the bottom left. To the right of the search bar, the text "≈ 21.000 results" is overlaid in a large, bold, black font.

Google "quiz for money" LOGG INN

Nettet Bilder Google Maps Videoer Mer + Innstillinger for søket

Omkring 20 300 resultater (0,19 sekunder)

≈ 21.000 results

You can even incorporate "SKILL" into number games...

Strategy + Luck (high/low "skill game" at Betsson)



New "skill games" has the potential to reaches a different audience, and maybe a group of players more competitively focused than gambling focused



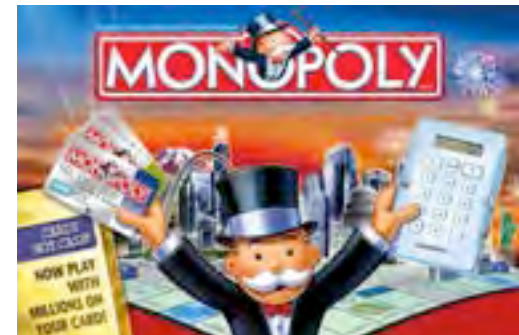
10.

"Moneytainment"

- Entertainment games becomes money games



“What if you could play these games for real money, wouldn't that be great?”



Example 1: Backgammon at Ladbrokes

Ladbrokes

Connected: 20
Seated: 14
TIME: 11:05:01
Connection:

1. Game Type

- 1 on 1
 - All
- Cash Games
 - All
 - Stakes < \$5.00
 - Stakes >= \$5.00
- Free Play
 - All
- Tournaments

Balance: N/A

BANK

2. Choose Game

Player 1	Player 2	Stake (Limit)	Type	Rating
dally101		\$0.50 (\$1.00)	Cash	1579
p4usskatt		\$0.75 (\$1.50)	Cash	1769
AndVard		\$0.85 (\$3.40)	Cash	1554
barjman		\$1.00 (\$4.00)	Cash	1655
fanner		\$3.00 (\$6.00)	Cash	1752
diceman1		\$4.00 (\$8.00)	Cash	2168

Hide Games in Progress Hide Free Play Games

CREATE NEW GAME

GETTING STARTED

To get started, choose a game type from the 1st column. Then a game from the 2nd and simply press JOIN GAME.

Join a Game or Set up your own

Welcome to **Ladbrokes Backgammon**

OPTIONS **HELP** **CONTACT US** **REGISTER** **LOG IN**

Example 2: Low stakes Hangman at Ladbrokes



Example 3: Low stakes Quiz at Ladbrokes



But maybe the most interesting example...

Virgin

TOURNAMENTS GAMES HOW IT WORKS VG BLOG

LOG IN

GO f Connect

WIN MONEY PLAYING VIDEO GAMES

- FIFA 13 NOW AVAILABLE
- XBOX 360 & PS3™
- GAMERS IN YOUR SKILL LEVEL
- PLAY WITH FRIENDS
- HEAD TO HEAD CASH CHALLENGES
- 24/7 CUSTOMER SUPPORT

IT PAYS TO HAVE GAME

\$37,499,970

WON PLAYING ON VG

SIGN UP NOW
JOIN FOR FREE

HOW IT WORKS

3 Easy Steps to Big Money

- 1 Find a Match**
Join a tournament or challenge members.
- 2 Play Online**
Go to your gaming console and compete online.
- 3 Make Cash**
Withdraw your winnings at any time.

\$\$\$

[LEARN MORE](#)

GAMES YOU CAN PLAY

Sign up for free and win real money competing online in your favorite console games.

XBOX 360 PS3

SEE ALL GAMES

These are the titles currently available...



...if you have kids at home, some of these should be household names

If you want to learn how it works, visit:

<http://virgingaming.com/how-it-works/>

Or get instructions on YouTube

The screenshot shows the Virgin Gaming website's 'How It Works' page. At the top, there's a navigation bar with 'TOURNAMENTS', 'GAMES', 'HOW IT WORKS', and 'VIDEO'. The main header features the Virgin Gaming logo and the text 'PLAY VIDEO GAMES AND GET PAID' with a sub-headline 'A QUICK GUIDE TO BECOMING A BALLER'. A prominent red button says 'SIGN UP NOW JOIN FOR FREE'. Below this, a chalkboard-style graphic with a man's face and various symbols like a dollar sign and arrows is visible. The main content area is titled 'THIS IS HOW VG WORKS' and lists four steps: 1. SIGN UP NOW FOR FREE, 2. WHAT GAME DO YOU PLAY?, 3. PICK YOUR STYLE OF PLAY, and 4. CHALLENGE PLAYERS. A video player is embedded, showing a thumbnail for 'How to Kick Ass & Win Cash With Virgin Gaming' with the text 'Here's the run-down' written above it.



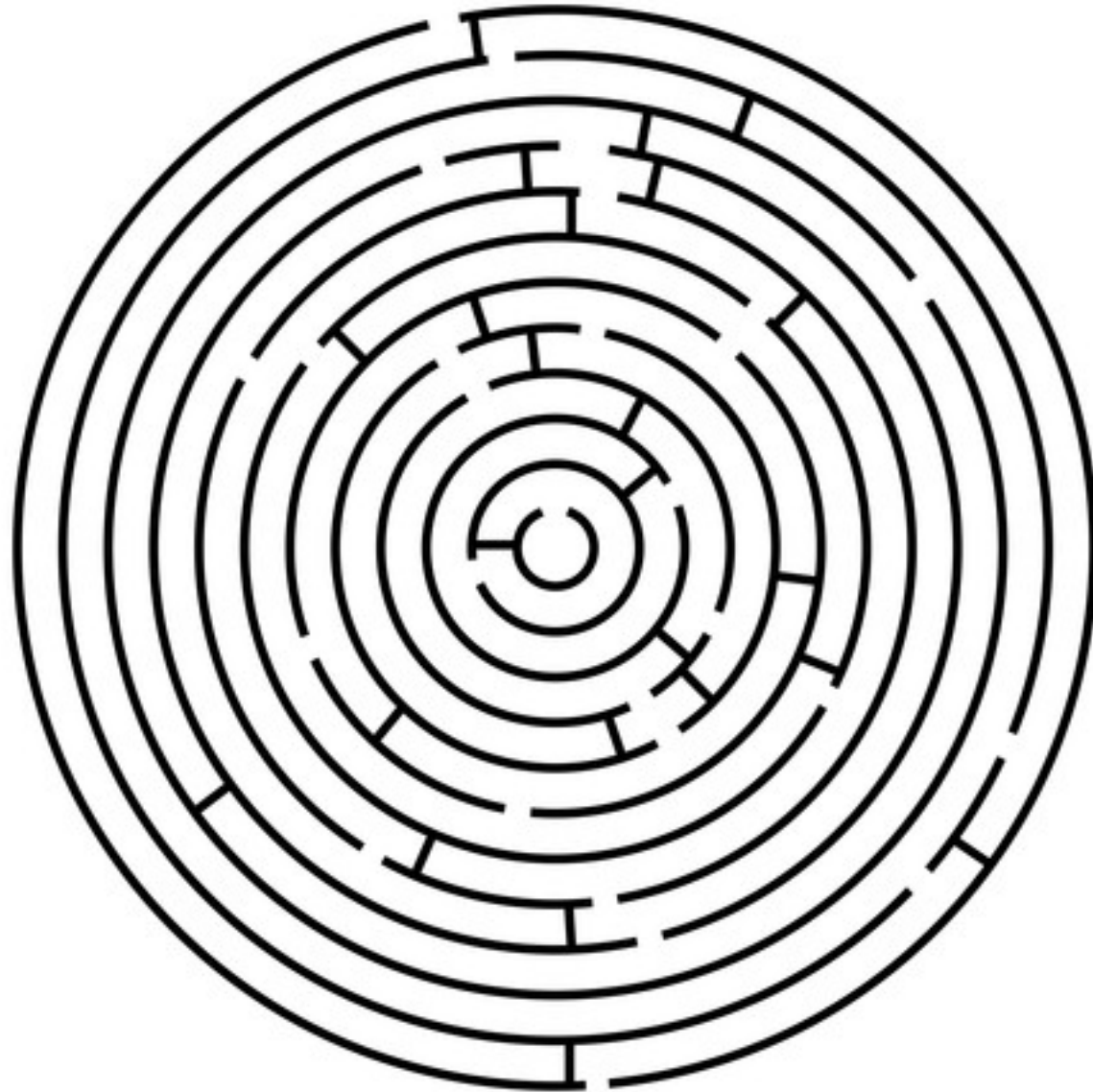
If 18 year olds can play these games for money...

...how do you think they will feel about these games?



11.

Gamification



Everything seems to be a game these days...

Gamification is...

"...the integration of game and gambling mechanics, feedback loops, and rewards into a service, product, website, etc, in order to drive customer involvement and participation "

Heineken
STAR PLAYER

GOAL
IN NEXT 30 SECONDS?

UEFA CHAMPIONS LEAGUE

0-0

BORUSSIA DORTMUND VS FC BAYERN MÜNCHEN

20:59

TIMING HELP

POWER UPS

POWER UPS BOOST YOUR SCORING CHANCES
SO MAKE SURE YOU USE THEM TO GET
AHEAD.

MAX POINTS
SCORE FULL POINTS ON BONUS
QUESTIONS

50:50
REMOVE 2 INCORRECT BONUS
ANSWERS

GOAL
EXTRA 30-SECOND GOAL CHANCE

YOUR LEAGUE

BADGES

STATS

SCORE: **0** PTS

THE CHANCE



572

THE CHANCE

NIKE'S GLOBAL SEARCH FOR THE NEXT WAVE OF SOCCER PLAYERS WITH THE TALENT AND HUNGER TO GO PRO.

WATCH THE FILM





Sony PlayStation Norge

Vinn en tur til E3



Like



Win a trip to E3 2013

You and a friend could soon be on your way to Los Angeles to soak up one of the world's biggest video games events.





Are these alternatives, substitutes or direct competitors to gambling?

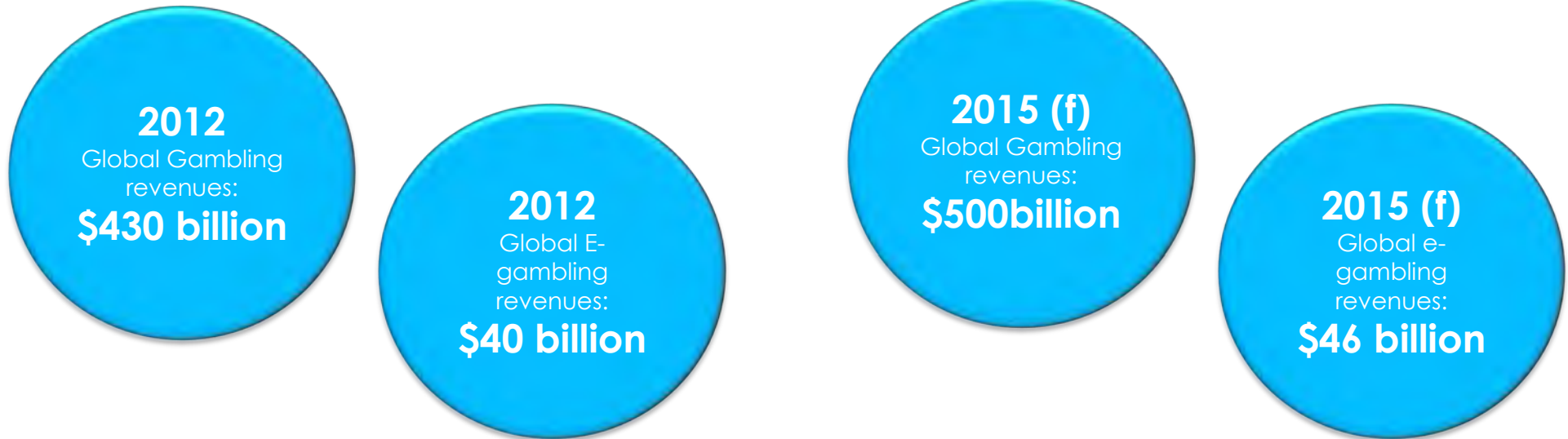
How does the widespread use of game and gambling mechanisms, influence customer expectations of what real money games should feel and look like?

Wrapping up:

This is a **MASSIVE** business....

2012

2015 forecast



...and it will grow even **BIGGER!**

Dominating forces and areas of change:

Changing Context

1. *From Bad Guys to Serious Business*
2. *Get BIG or get EATEN*
3. *Media corporations getting in*
4. *Social media gambling – a GAME CHANGER?*
5. *USA's e-gambling regulation*
6. *EU's stance gambling regulation*

Changing Content

7. *Monster money*
8. *Instant Gratification*
9. *Skill = thrill*
10. *"Moneytainment"*
11. *Gamification*

A close-up photograph of a white sign with a black border. The word "END" is written in large, bold, black, sans-serif capital letters. The sign is mounted on a post, with a metal fastener visible at the top. The background is a clear, light blue sky.

END