

Sandton Convention Centre
South Africa
2-3 October, 2019

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AFRICA



Shining a light on Africa's
gaming ecosystem

2019 Conference Agenda

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Sandton Convention Centre

South Africa

2 - 3 October 2019

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Two streams to thrive.



advanceAFRICA

Advance the market, broaden your horizons, and discuss the opportunity presented by African gaming with peers, investors, and regulators that embody the industry. advanceAFRICA makes time for quality brainstorming on how the future of the African market can be shaped to allow for sustainable growth of the industry.



microscopeAFRICA

Put African innovation under the microscope. Using case studies from across the continent, this stream presents a series of workshops looking at different facets of the industry. Deep-dive into: the customer journey, marketing, the move from retail to online, building a sustainable start up, among others. Inherently practical, microscopeAFRICA creates a space for learning and lesson sharing from expert speakers and panellists representing the African gambling industry at large.

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Day 1
2 October, 2019

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**Day 1 – 2nd October
AdvanceAfrica**

**Day 1 – 2nd October
Microscope Africa**

10:30

The Next Step in Regulation – Developing an investment friendly ecosystem for the gaming industry in Africa

Featuring leading regulators and industry experts, this session will discuss the current state of the African regulatory landscape and will look ahead at the next steps in regulation to further develop the African gaming industry. With growing aspirations to create standardization across the continent, hear how African gaming can move forward as a unified industry.

- Providing standardized Pan-African and regional regulation – is either achievable or practical?
- Finding the right tax model – Turnover or GGR?
- Understanding and embracing online gaming – how can mobile best be regulated?
- Using the economic impact of regulation to boost public perceptions of gambling

Yahaya Maikori, Senior Partner, **Law Allianz**

11:15

A-Z: How Operators Can Invest in Africa

As the world's second largest and second most populous continent, the region is full of diversity and complexity and this is evident in the gambling industry. This session will discuss the needs to know for operators looking to enter this exciting market:

- Regulatory challenges – identifying the right market
- Procurement processes
- Understanding the infrastructural challenges
- Operational impact and investment required
- Navigating the barriers to entry – licensing and taxation
- Adapting product and payment models for the market

Representative, Lottotech
Dan Phillips, CEO, Nel Advisory LTD and Partner to the Spectrum Gaming Group

12:00

Networking Break

12:30

Tackling Responsible Gambling for a Sustainable African Gaming Industry

With Uganda implementing an outright ban of sports betting and Kenya announcing tougher regulations with a specific focus on online and mobile gambling, it is evident that the African market is not immune to the political backlash seen in its European counterpart. This session will focus on how best to leverage marketing opportunities responsibly:

- Encouraging self-regulation before forced regulation
- The importance of CSR-led gambling advertising in an increasingly digital world
- Know Your Customer (KYC): Utilising data to protect high risk demographics
- Educating customers with new products, features and risks to avoid overwhelming a new market

John Kamara, Director, **Global Gaming Company**
Aggrey Sayi, Country Marketing Manager, **OdiBets Kenya**

Understanding the Market – Customizing Products for the African Region
With LSMs varying drastically across the continent, understanding the different niches of the African market is crucial to an operator's success. This session will discuss the differing regions in Africa and how you can find the right product offering for your target market:

- Finding the right product offering – horse racing, sports betting, igaming, lottery
- Ensuring products are suitable for their market – competing with high data costs and low bandwidth environments
- Providing the customer with value - how do you make a premium product attractive in a low LSM market?
- Sports betting - Looking beyond the European leagues to create a USP from local leagues
- The surge in popularity of virtual products
- Looking ahead: live betting and in-play

Rais Busom, Head of Product, **Betika**
Will Westcott, Head of Business Development, **BetGenius**

Integrated Resorts (IR) – How IR Can Provide a Positive Economic Impact for the Region

The demand for IR is growing worldwide. This session will discuss how the wider economic benefits brought by IR can be achieved through effective regulation and operation:

- Drawing parallels with Japan – how effective regulation can support tourism and reduce gaming risks to local communities
- Why Africa's budding middle class and youthful population provides the ideal customer base for IR
- The appeal of cultural facilities at IR that drives tourism to the region
- How IR would help to develop infrastructure and jobs for local communities
- The opportunity provided by AI to support IR and improve customer experience

Yahaya Maikori, Senior Partner, **Law Allianz**

Optimising Payment Processing in a Market Dominated by Online Solutions

- *How operators can effectively integrate with telecom and payment solution providers in Africa*
- *Providing standardisation of mobile wallet payments to enhance efficiency and user experience*
- *Keeping up with play – making sure payment processing can keep up with new live betting and in-play products*

Max Wilkie, Payment Services, Director, **Sportpesa**

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Day 1 – 2 nd October AdvanceAfrica		Day 1 – 2 nd October Microscope Africa
13:15	<i>Networking Lunch</i>	
14:30	<p><i>Moving Online – If You’re Still Considering Making the Transition, it’s Too Late!</i></p> <p>Mobile betting is not new to the African region and, while regulation still needs to be developed, the question for operators is no longer should we be in mobile, but how can we take advantage of the digital space. This panel will explore the key considerations and how mobile can progress across Africa:</p> <ul style="list-style-type: none"> - Striking the right balance between retail and mobile – retaining a retail presence to cultivate brand trust - Developing products that are suitable for online channels - Sportsbooks, lottery and casino – taking the key verticals online - How customer data can be effectively collected and utilised <p>John Kamara, Director, Global Gaming Company Lasha Gogiberidze, CEO, Parimatch Africa</p>	<p><i>Thriving in the Age of Customer Data</i></p> <p>This session will explore the benefits of effectively acquiring, analysing and utilising customer data with user experience and customer retention two key indicators of success in the modern age.</p> <ul style="list-style-type: none"> • Building player trust- familiarising customers with data protection • Spotting patterns – using data to distinguish VIPs, recreational, and at risk players • Player personalisation – analysing player habits to provide a personalised user experience that reduces risk of burn out and increases sustainable customer retention • Data collection – transitioning from retail to mobile • The differences between European and African player data – what European operators need to know <p>Brenton Chelin, Head of Marketing, Bet.co.za Robert Koning, Managing Director, Best Sports Betting Media</p>
15:15	<i>Networking Break</i>	
15:45	<p><i>Gaming in Africa: How to Effectively Manage Public Perception</i></p> <p>Gambling can be a divisive issue across the world and this is especially evident in Africa, a continent with widespread low LSM populations as well as prevalent cultural and social taboos. Navigating the negative public perception of gambling is crucial if the industry is to fully develop and thrive in Africa. To do this, the industry must demonstrate it’s potential to provide positivity to local economies:</p> <ul style="list-style-type: none"> • Demonstrating the positive impact of effective regulation <ul style="list-style-type: none"> o revenue raised for public and community projects o ensuring at risk demographics are not targeted for marketing - Boosting local economies through the attraction of foreign investment, jobs and tourism - Taking examples from lotteries, including the UK, in the support of good causes 	<p><i>Virtual Sports – Providing customers with an endless supply of action</i></p> <p>As the popularity of gaming soars across African jurisdictions, punters are constantly on the lookout for new products to bet on. This session explores how virtual sports are servicing the demand for fast-paced, regular events which can be bet on and won in real time.</p> <ul style="list-style-type: none"> - Virtual sport leagues – adding complexity and depth to product offerings - Offering players a customized and tailored betting experience - Rolling out virtual games – the technological challenges

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Day 2
3 October, 2019

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**Day 2 – 3rd October
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**Day 2 – 3rd October
Microscope Africa**

10:30

Getting to know the Francophone African Gaming Market

French is spoken by an estimated 120 million people in Africa spread across 24 Francophone countries, many of which have long standing and established gaming markets. This session will explore:

- The current state of Francophone African gaming markets
- Opportunities and challenges in Francophone Africa: lottery, sports betting, land based and online gaming
- Case studies of successful business models

Philippe Vlaemminck, Partner, Pharumlegal

Attaining a License in Africa: How Operators and Regulators Can Work Together to Provide Clarity to the Process

Adding to the challenges of pop up retail sites, growing online access makes entering the market increasingly easy for rogue operators. To ensure effective regulation, it is crucial that regulators implement a transparent framework of what licenses are needed and how they can be attained to safeguard and streamline the process for market entry.

- Developing a clear licensing framework
- Why operators need to carry out their own due diligence to understand the licensing required
- The impact of changing political environments and interventions
- Adopting anti-money laundering policies and practices

11:15

Francophone and other African countries gaming industry

With gaming growing across the whole of the African continent, it is important for both local and international stakeholders to understand the market. This is particularly important when assessing the similarities and differences between the markets and characteristics of Francophone and other African countries. This panel will bring together key stakeholders to discuss what you need to know when doing business in these jurisdictions.

Getting the Customer Experience Right: How technology can enhance hospitality in the Gaming Industry

With land based casinos and retail bookmakers remaining key corner stones of the African gaming market, ensuring customer satisfaction at brick and mortar sites remains a key priority for all operators. From the gaming floor to the concierge, technology lies at the heart of customer experience for both gaming and non-gaming offerings. This session will discuss how operators can enhance their sites to create a fully immersive and smooth experience.

12:00

Networking Break

12:30

Evolving with the Times: Regulators Keeping Up with Technological Innovation

With technological advancements in the gaming industry constant, the issue of regulators keeping pace remains. While technology creates enormous possibilities for the African gaming industry, until it is comprehensively regulated, it will not fulfil its potential.

- Online regulation – what is igaming and how can it be regulated?
- Developing regulatory solutions to protect both players and revenues
- Understanding and keeping ahead of the latest trends

Benjamin Yarnap, MD/CEO, Anambra State Gaming Board
Martin Sack, Founder and Director, Brainstorm online (pty) Ltd

Can land based casino slots and tables survive and thrive the evolution of technology?

With customer habits changing and a variety of new product offerings available, this session will look at whether now is the time for casinos to grow across the region and what role technology will play in their future:

- How appealing are slot machines to local consumers?
- Is further product localisation required to ensure slots take off as they have done in other markets?
- Skill based games and server based slots: looking beyond traditional games

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Day 2 – 3 rd October AdvanceAfrica		Day 2 – 3 rd October Microscope Africa
13:15	Networking Lunch	
14:30	<p>What Next for Lottery in Africa?</p> <p>While lotteries remain a popular vertical across most African markets, with a lack of player trust over potentially colossal prizes and operators struggling to diversify their product range, there is still huge room to develop the lottery space. This session will focus on what the next steps for African lottery could look like in:</p> <ul style="list-style-type: none"> - Diversifying the product range: live draw, RNG, item based - Improving the public perception of lotteries – learning from international case studies to demonstrate the benefits for local infrastructure and good causes - What would a coordinated African lottery look like? - Fixed-odd lottery betting - iLottery - Taking the step online <p>Dawid Muller, CE: Legal, Compliance and Integrity, Gidani Group Seun Anibaba, CEO, Lagos State Lotteries Board Jean-Marie Emungu Ehumba, Vice President and Managing Director-General, African Lottery Association and DR Congo National Lottery Company</p>	<p>Sports Content: How will the growth of streaming services impact sports betting and horse racing?</p> <p>There is no doubt that a sporting event being televised has a significant impact on the turnover generated by operators for that game. With the rise of streaming services competing with traditional broadcasting channels, this session will discuss what this change in viewership and their habits means for the gaming industry:</p> <ul style="list-style-type: none"> - How growing streaming services are changing the viewing landscape - How operators and broadcasters can work together to drive audience engagement - Opportunities for broadcasters to innovate – betting-focused streams, live data overlays and sports gambling programmes <p>Emeka Enyadike, Director, Digital Sports Africa Seun Methowe, Head of Advertising & Partnerships, DAZN</p>
15:15	Networking Break	
15:45	<p>Maintaining a Retail Presence in a World Moving Online</p> <p>While the continent rapidly moves towards mobile gaming, it is becoming increasingly evident that the market does not respond positively to exclusively online operators. This session will discuss why a brick and mortar presence still has a crucial role in many countries across Africa and how operators can enhance the appeal of their retail locations.</p> <ul style="list-style-type: none"> - Establishing a brand and developing player trust - Providing a straightforward payment process for customers - Offering a wider range of products and gaming verticals not regulated in the online space - Taking advantage of next generation technology and AI capabilities to enhance the retail experience <p>Ifeanyi Osode, COO, Fortune Bets Mukhethwa Nyase, Head of Retail, Bet.co.za</p>	<p>eSports in Africa</p> <p>With esports growing exponentially around the world, there is huge potential for the industry in Africa. This session will explore how, if implemented correctly, the right esports campaign could thrive in a region with a high mobile and digital penetration rate:</p> <ul style="list-style-type: none"> - Africa's growing millennial demographic and a booming tech hub – a perfect match for esports - Developing regulation to nurture and encourage esports as a new revenue source for the gaming industry with integrity as priority number one. - Turning informal peer to peer competitions into a commercially viable industry - Potential employment and tourist benefits <p>John Kamara, Director, Global Gaming Company Joseph Bertrand, Brand Marketing & Sponsorship, Orlando Pirates Football Club / Pirates eSports Kwecy Hayford, President, Ghana eSports Association</p>

