BUILDING BRIDGES

Impact Of Pace Of Change On The Gaming Industry

GAMING STANDARDS

ASSOCIATION

PLATINUM MEMBERS
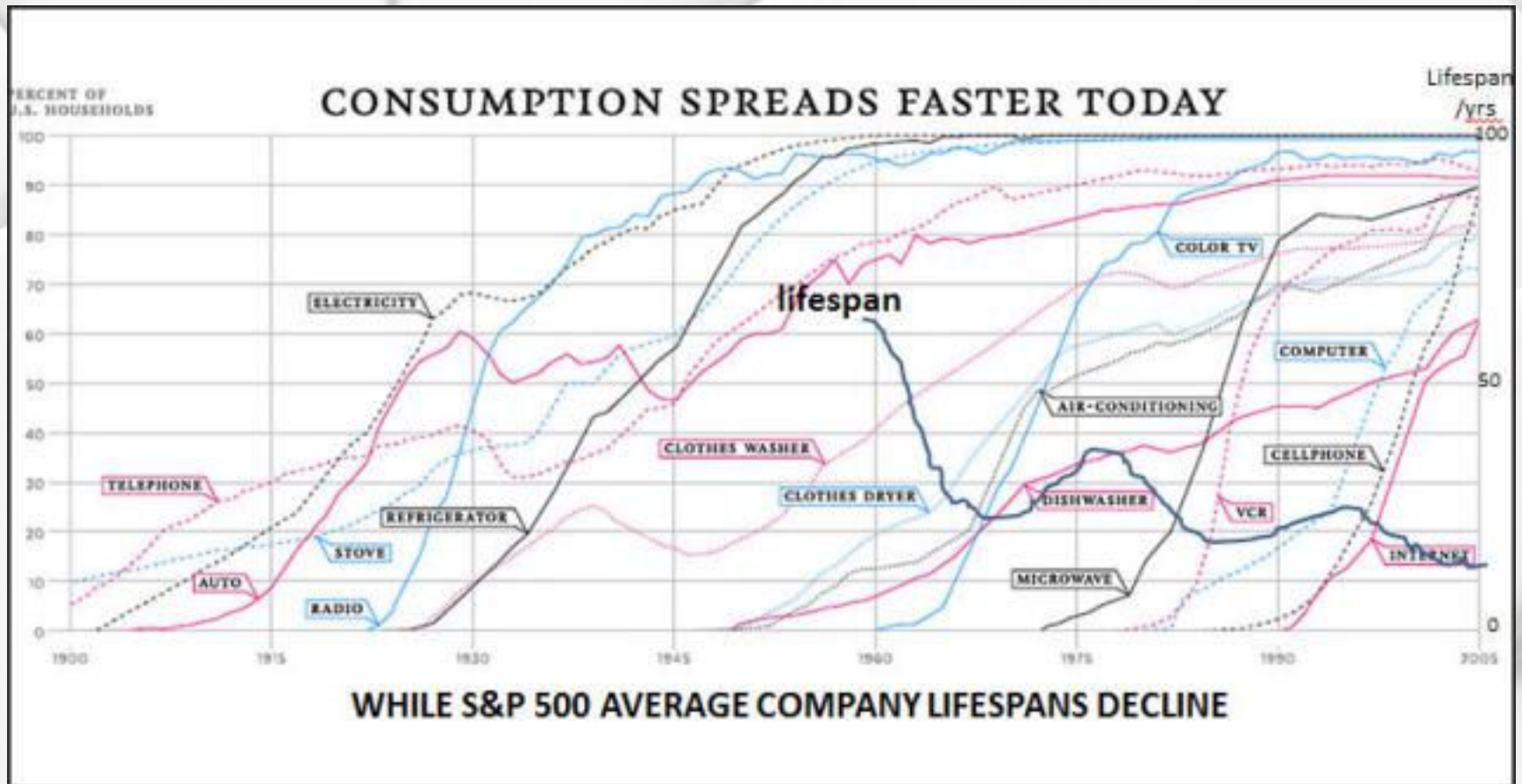
PRINCIPLES OF GAMING POLICIES

- **Ensure that all games are delivered fair and in a transparent manner**

- **Protect minors and vulnerable persons from gambling**

- **Ensure that gaming activities are free from crime, corruption and money laundering**

- **Protect the public interest**

PACE OF CHANGE IN OUR WORLD

Technology Changes **Exponentially!**

Speed of adoption is significantly **faster** as
population gets more tech savvy

IMPACT ON THE GAMING INDUSTRY

- **Blurring the lines between Land-based and Internet gaming technology!**

- **Gaming is moving to a personal device anywhere anytime**
  - EGM's always online, contain tablets or cell phones and using personal online wallets

- **Gaming is shifting from game centric to system centric to player centric**

MOBILE GAMING MARKET

- **The massive growth of smart phones and tablets is one of the most important technology innovations in the online gaming industry in the last 5 years**
  - By the end of 2014 there will be more than 1.75 Billion number of smartphones in use
  - By the end of 2014 there are more than 7.5 Billion mobile subscribers
  - Analysts predict an annual growth as high as 39%

- **Dec 2012: 28 year Londoner won $530,584 at William Hill property playing a game on his phone!**

IMPACT ON POLICY DOMAIN - CHALLENGES

- **Increased pressure to create policies and technical standards**

- **Insufficient capacity for effective oversight**

- **Technology is changing at an exponential rate**

- **Resource restrictions: Time, Money and Expertise**

- **How to effectively and efficiently supervise and control**

IMPACT OF TECHNOLOGY CHANGE FOR REGULATORS

- **Regulators are challenged with crafting regulations on how to supervise and control this borderless and faceless new industry**

- **Regulators have to adapt from chasing a paper trail to active real-time monitoring**
  - Lack of standards forces custom interfaces for every system licensed
- **Rapidly fading technology distinction between land based and online**
  - No longer land-based & internet gaming but online gaming
  - Multiple personal electronic wallets – Paypal, ApplePay…

- **Playing a Catch-up game – chasing the internet**

STANDARDS HELP CREDIT CARD COMPANIES NOTICE IRREGULARITIES FIRST

Free Text Msg: *Citi Cards Fraud Dept. Did you attempt a charge at Airmalta in the amount of $106.14 on 05-14? Yes, reply 1, No, reply 2. You may also call 8003866624 and enter pin 5642938. To Opt-Out reply STOP.*

Free Msg: Citi: *Your account has your travel plans noted from: 2014-10-11 00:0 - 2014-10-14 00:0 . If you did not request this contact us. Send STOP to Opt Out.*

CC Companies Knows More About You Then Anyone Else!

REGULATOR BENEFITS OF CENTRAL MONITORING MESSAGING STANDARD

- Improves the **quality, accuracy and reliability** of information as it enters, processed and then reported to regulators.

- Enhances the **breath and depth** of information that can be included in analyses and reports on a routine basis with minimum to no added costs.

- Helps you to **pull time and costs out** of the reporting process.

- Allows **sharing** of information amongst regulators on a global level.

- Enables the developed of tools to **detect fraudulent activities in real-time**, across multiple states or countries thereby significantly supporting the principles of gaming policies.

STANDARDS WILL HELP TO ACCURATLY COMPILE, REVIEW AND AUDIT & PROVIDE CONSUMER PROTECTION

FIVE PRIORITIES OF INNOVATION

- **Create a culture of openness**

- **Build platforms for participation**

- **Foster dialogue and continual improvement**

- **Protect the public interest**

- **Organize collective action in the industry**

THE ROLE OF GSA

- **Encourage collaboration between industry stakeholders**
- **Support the creation of any standard that helps the industry**

- **1600+ volunteers from 180+ companies have been working tirelessly together for more than 16 years to create a series of robust information messaging standards.**
  - From the cleanup of SAS and the creation of G2S, S2S, GDS and GAT
  - To the creation of online gaming standards to:
    - Integrate 3rd party game services into iGaming platforms
    - **Centrally monitor iGaming operations (start in 2015)**
    - Interface external services to iGaming platforms
    - Integration iGaming platforms with land-based gaming operations

DID YOU KNOW?

➢ **Over 192,000 EGMs Support GSA's G2S**

➢ **Over 145,000 EGMs Support GSA's GAT Remote Compliance Verification**

➢ **Over 1000 Systems Offer Some Level Of Support For GSA's G2S**

GLOBAL REACH

The Companies That Have 70% Of The Global Market Place Support GSA's G2S!

✓ Canadian Provinces Stipulate GSA standards

✓ Greece Stipulates GSA standards For 35,000 VLTs

✓ ClubNSW, Australia, Identified G2S To Monitor 73,000 EGMs

✓ GSA Standards Are Deployed in 76 Countries

BUILDING BRIDGES

- **Regulators to encourage the adoption of open communication standards**

- **GSA offers support to regulators through collaboration**

- **Get involved in GSA and help drive, set and review the standards**

- **Let's Build Bridges to keep the industry safe, productive and efficient**

- **Regulators are the biggest beneficiaries of open industry agreed to data standards.**

"Open Standards give you peace of mind"