

# Building Loyalty across offline and online channels

[GIGse 27<sup>th</sup> April 2012]



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# Agenda

- [01] Regulated Markets in Europe – Why few examples of integrating Online and offline channels
  
- [02] Lessons Learnt in the online launch by Casino Gran Madrid
  
- [03] Land-based players - moving them online and why the devil is in the detail

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# Agenda

- [01] Regulated Markets in Europe – Why few examples of integrating Online and offline channels

# [01] What is regulated Europe?



- 27 Countries, 100s of regions
- Different gaming laws
- Lack of consensus on EU level

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[01] Why there are very limited examples in regulated Europe for integrated gaming offers

1

Regulation

2

Organisation

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# Agenda

- [02] Lessons Learnt in the online launch by Casino Gran Madrid and other land based Spanish Casinos going online

# Spain – 17 Regions



# Casino Gran Madrid (1)

- Leading Casino Group in Spain with one of the largest product & service range in Europe
- Only Legal Online Casino Operating in Spain (Madrid licence)
- June 2012 launching nation wide offering

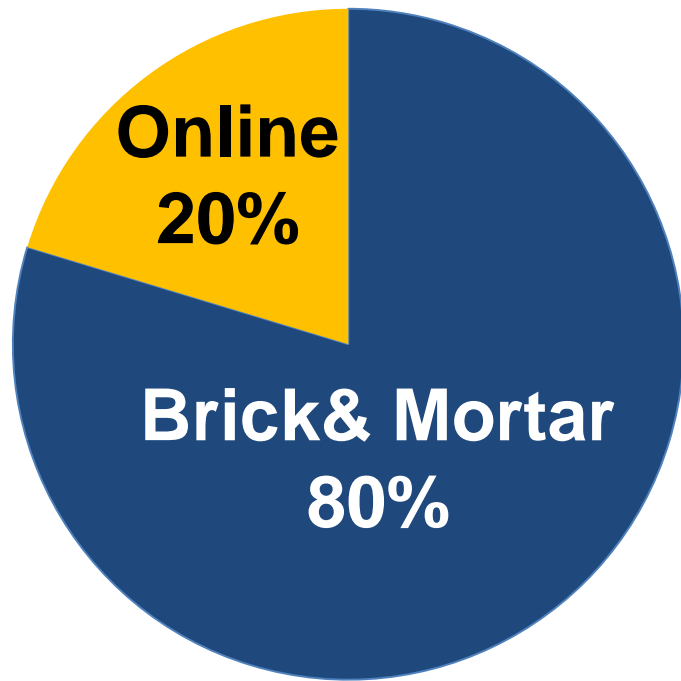
- 100+ card tables and 350+ slots
- 700.000+ clients every year
- 1 out of 6 casino workers in Spain work for Casino Gran Madrid





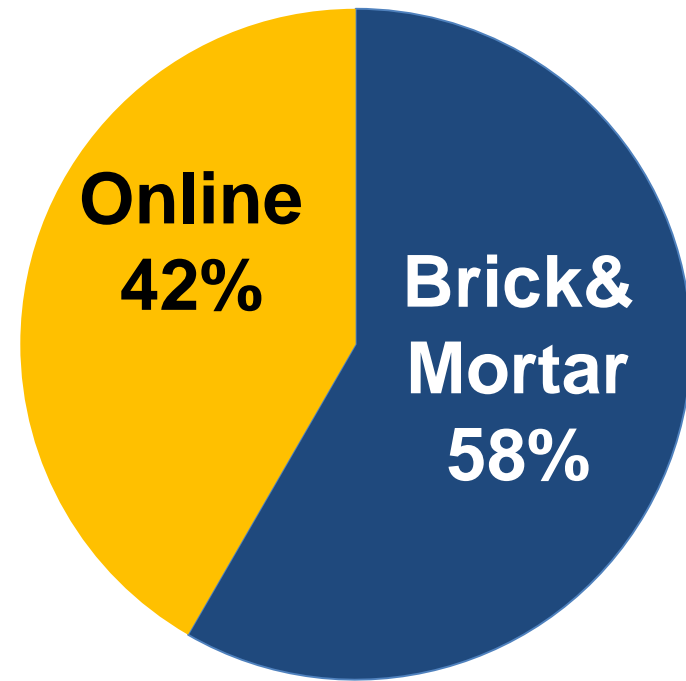
# Casino Gran Madrid (2)

## Madrid Market Size - Casino Figures



**2010**

Total Market Size  
€123 m



**2014**

Total Market Size  
€192 m

# Casino Gran Madrid (3)

## Private Gaming

### Brick & Mortar

- Regional regulation
- Operators with licence in Spain



### Online

- No National Regulation
- Operators with licence from other countries



## Casino Gran Madrid (4)



Within this  
context...

What options  
did Casino Gran  
Madrid have?

# Casino Gran Madrid (5)

1

Do nothing



# Casino Gran Madrid (6)

2

Act within  
Regulatory  
Boundaries



Existing regulatory framework in Madrid

Current client demand

Keep up with technology revolution

# Casino Gran Madrid (7)

- **Strategy** - Define a clear market positioning and entry strategy



- **Technology** - Translate that strategy into a technological solution and operational set up that delivers objectives
- **Marketing** - Develop the right marketing plan to achieve goals
- **Regulation** - Ensure that every action takes into account regulatory context

# Main Learnings - Strategy

**marketing**

- Focus on brand values before brand name
- Differentiate

**Customer Database**

- Control

**Selection of Providers**

- Quality of product and services critical to players
- Use in-house knowledge

# Main Learnings - Strategy

**“Brick & Click”  
Advantages**



- Main source of differentiation
- Economic advantages

**Future Flexibility**



- Rate of change of technology, market and regulation critical

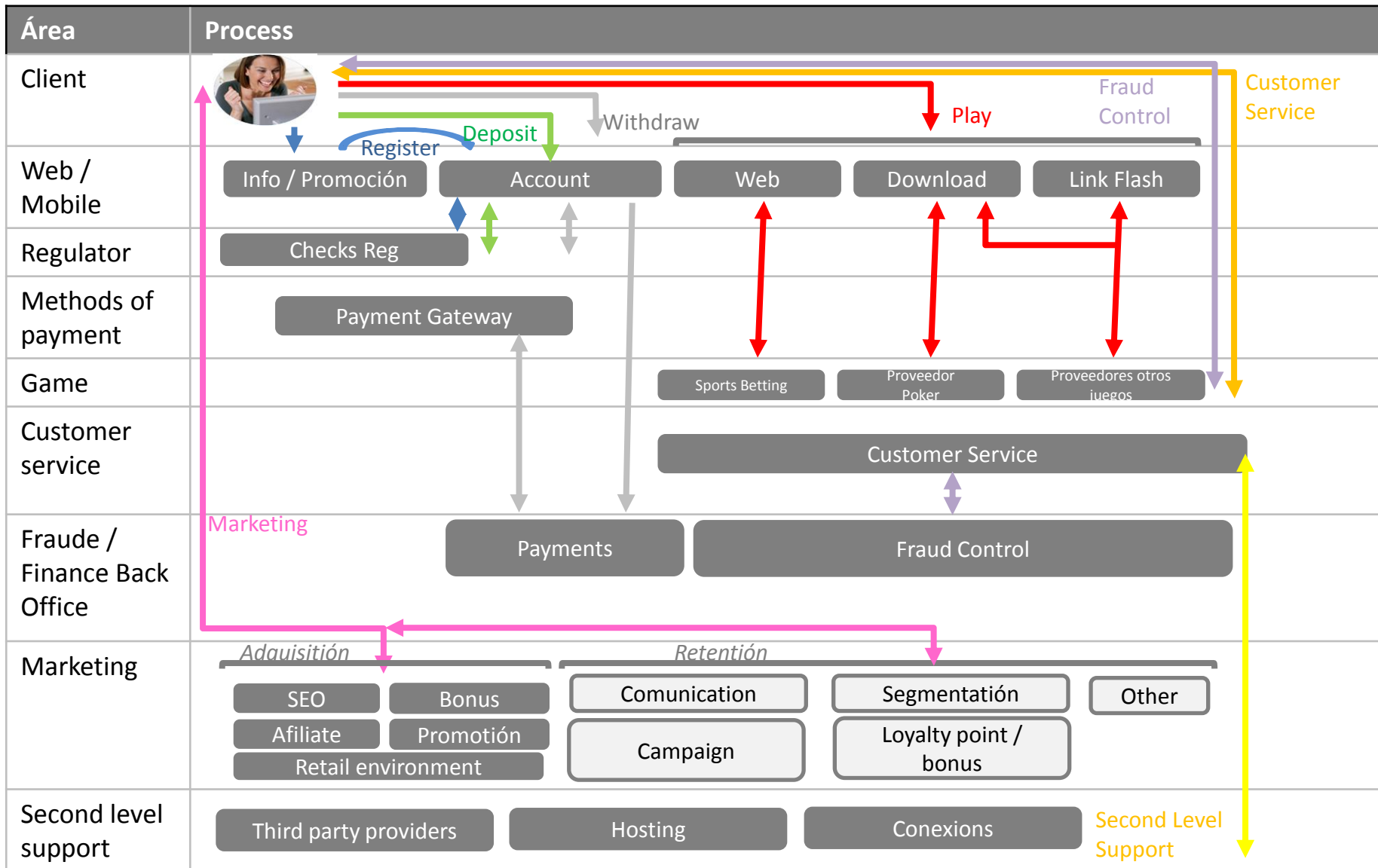


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- [03] Land-based players - moving them online and why the devil is in the detail

# Map of customer interactions



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# Conclusion

- Common Sense – return to fundamentals
- Learn from other jurisdictions / supplier BUT adapt
- Look around to other industries for ideas
- Be willing to invest with caution