

15th June 06



The 3rd Mobile Gambling Summit 2007

22nd Jan 2007

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GamBond™



- **Mission:** *Global Trust & Confidence*
- **Structure:** Independent, transparent, well-capitalised guarantee company
- **Product:** A financial guarantee of remote gaming gambling establishments
- **Triggers:** Insolvency, loss of license
- **Transparent:** Web-based disclosure
FSA regulated

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Gareth Wong



- 2002 Advised Camelot on their interactive strategy
- 2003 Conceived, devised & launched GamRock™ mobile gaming gambling brand & operation(s)



- 2004 Founded GamBond
- 2005 Published the “**mobile gambling** chapter” of “Internet Gambling Report”, covering iTV in 06
- 2005 Founded Gambit
- 2006 Founded **Gaming Money Summit**
- Also Board Advisor to Gaming Gambling and Telecom firms.
- See more on www.GarethWong.com



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Remote e-Gaming market

Various ‘Classes of jurisdictions’:

- Liberal/self-regulation (e.g. Curacao, Antigua, Costa-Rica)
- Well regulated (Gibraltar, Alderney etc.)
- Previously over regulated (e.g. Isle of Man)
- Up and coming (e.g. Latvia, Philippines)

International legal minefield:

- Prohibitions (e.g. **US, HK)
- Combinations (e.g. Korea, Australia, Holland)
- Laissez faire (e.g. UK, regulated from Sept07!!)

ALL market Forecast goes out of the windows, since “Unlawful Internet Gambling Enforcement Act” [UIGE] passed in US.

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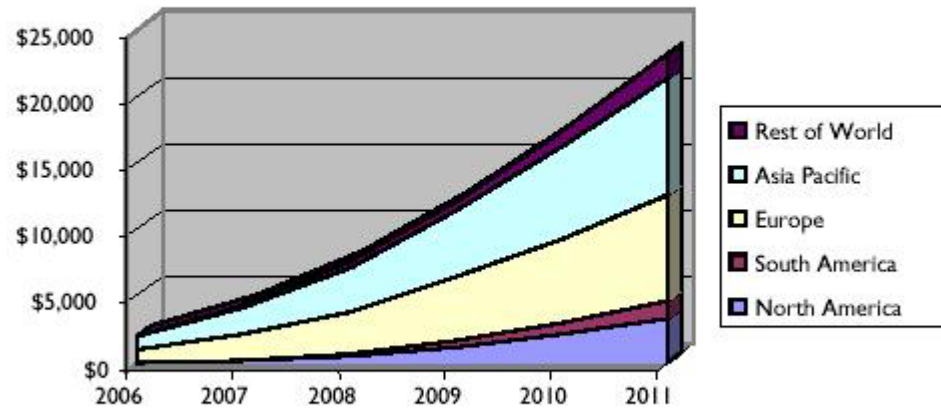
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Mobile gambling market



Figure 2: Total Revenues from Mobile Gambling (Casino, Lotteries & Betting).
Regional Forecast 2006-2011 (\$m)



Source: Juniper Research

➤ Break down by regions.

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Mobile gambling market [2]



**Table 1: Total Revenues from Mobile Gambling (Casino, Lotteries & Betting).
Regional Forecast 2006 and 2011 (\$m)**

	2006	2011
North America	\$0	\$3,340
South America	\$34	\$1,328
Europe	\$950	\$7,940
Asia Pacific	\$966	\$8,818
Rest of the World	\$40	\$1,765
Total	\$1,991	\$23,190

Source: Juniper Research

➤ \$23bln. By 2011, **probably NO One can really say!**

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The Prizes



➤ **Profit? No. of Customers? Geographical region?**

KEY:

- **Seamless Signup, Pay-in/out & via mobile**
- **Asia or South America could be the best prize or just a market that is RIPE for...**
- **Devising/Finding the Holy Grail (right products/format/game/ cost vs prizes) for your target market!?**

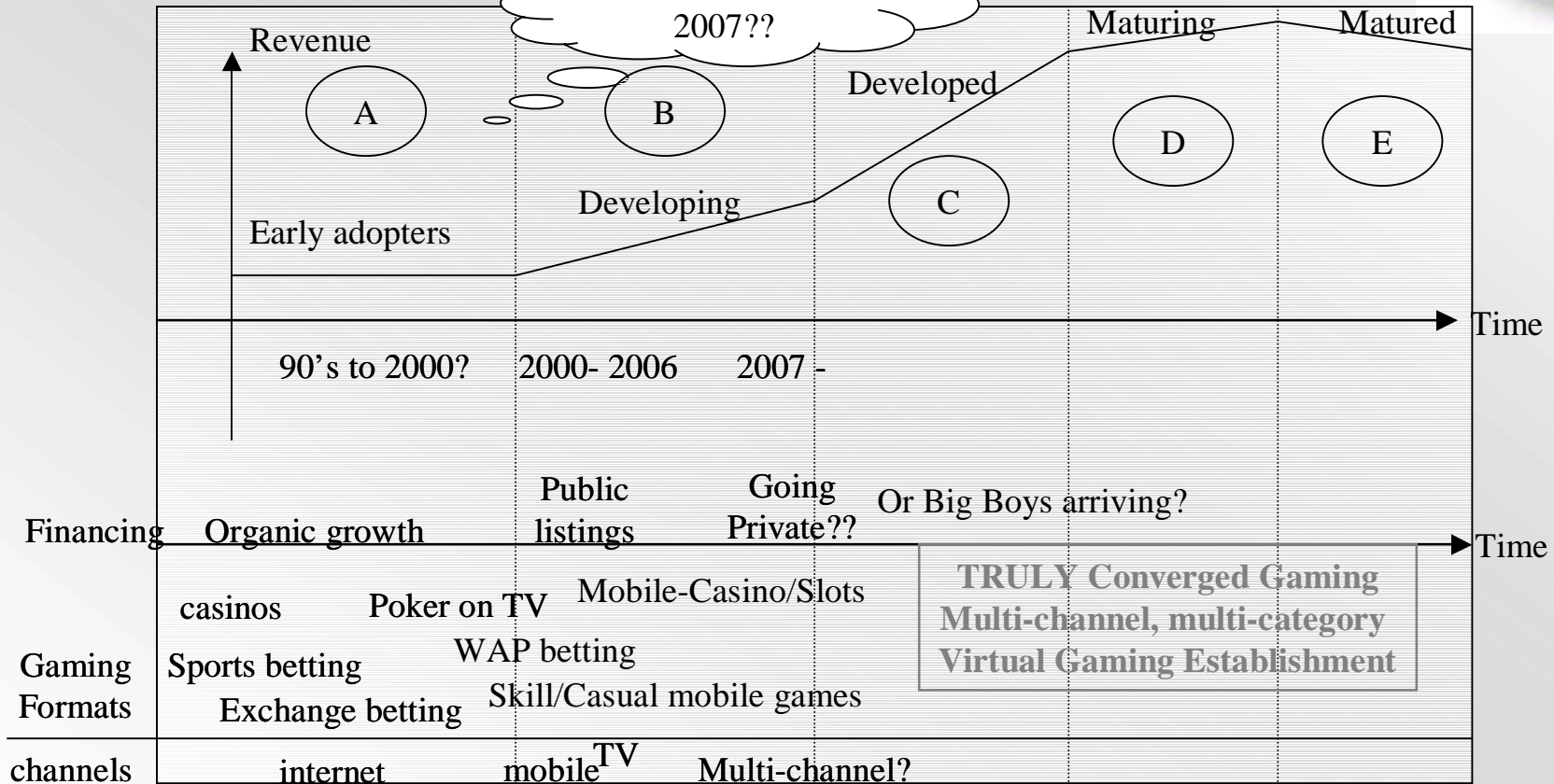
- **but WHO are in the best position??**



Industry LifeCycle



Where Are We in 2007??



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Regional Challenge, USA/CA

(Results gathered by worldwide expertise in the last two days
Mobile Gambling Summit America Oct2006.)

Everyone is adopting, wait & see or
damage limitations.

Find & work with WHAT are legal:

- LEGAL way (Horse racing, Casinos,
state lotteries etc. ...)
- Skill gaming?! Walt Disney etc.
Signed Fun Technologies...
- Q: WHO Makes money!?
- Solving the payment challenge
'anyone'?



Regional Challenge, Asia [2]

Legally: challenge is whether/how/when to enforce the law (towards consumers, operators or those get caught?) Consider:

1. Identify key partners
 - a. Identify future trends
 - b. Keep track of key stake holders
2. Find, locate & 'befriend' the lawful licensees
3. Know what 'role' you play (s/w, payment, marketing, etc,)
4. Establish viable, legal & scalable business model
5. Situations are games & jurisdiction specific!

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Common Thread



Mobile Gambling: Key Success Factors

- Trust/confidence/ Brands
- Gaming formats
- Easy of use
- Distribution
- **Focus on changing/ identifying culture**

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Trust of Brands



- Mobile is best (only?) way to reach the mass market
- Mass market is brand conscious (loyal!?)
- More trust with Movistar/ Telefonica/ Vodafone/O2/ Orange than generic names like 'JackPotMobile' etc.
- Where are likes of Easymobile or Virgin mobiles?

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Mobile gaming format



- So far, mainly product extensions of existing online products
- Need to bear in mind the target audience & what they aim to do whilst mobile?
- Appropriate products for channel & target is KEY, (e.g. 'how lo' from million21)
- Maximise the use of capability of handset (e.g. new poker clients)

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Ease of use



- Can you signup from mobile? (via WAP, SMS or J2ME clients?)
- Do all the necessary KYC on mobile?
- Call-centre call back?
- Mobile deposit/withdraw possible?

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Distribution



- Acquire new or ‘monetise’ existing user base?
- What is the RoI of the campaign?
- What are the demographic of mobile gamblers?
- How to target them? (online, flyers, beer mats? Sport-programs?)
- How to ‘deliver’ the content?

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Opportunities



- Skill & Casual Mobile Gaming
- Seamless mobile payments (national & international)
- Provider of traffic (portal, mobile search, opt-in databases)
- Security software (needed to build trust if consumer is aware of any risk)
- True multi-channel gaming (TV, mobile, billboard, online, shops etc.)
- Learn from experiences, ITV-PLAY etc.



Future



- Geographical opportunities depends on your own company's strength
- *Key is to KNOW the customers' needs/wants on mobile + LEGAL!!*
- **Need** further investments by major brands
- Critical mass is key
- **Media play key roles** (e.g. Cultural forming TV/Radio programs)
- Mobile data/traffic/revenue need to be pooled = help each other!

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Thank you

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**Next Gambit Public event in Feb/March, slight entry fee,
Innovation, Sponsorships, Finance, Marketing, mobile & iTV**

details & signup at www.TheGambit.info

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