



Eilers & Krejcek
Gaming

G2E Content Trends & Takeaways

Adam Krejcek, Principal, Eilers & Krejcek Gaming, LLC

Robin Littleworth, Product Consultant, Eilers & Krejcek Gaming, LLC

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Summary

Our monthly Mobile Product Trend reports are authored by Robin Littleworth, Product Consultant for Eilers & Krejcik Gaming, and are specifically geared towards product and business intelligence managers. As many interactive games are influenced by brick-and-mortar casino content, in this special monthly report we highlight some product designs and trends showcased at G2E.

OUR KEY TAKEAWAYS

- **Asian Progressive Machines.** Seems that every slot game vendor has their own Asian Progressive game now, as nearly every prominent vendor showcased at least one such product in their booth at G2E. These games were introduced a few years ago as an attempt to attract players in Asian markets, but now inhabit casino floors in nearly all markets. But with so many similar games being offered in the marketplace, we wonder what and when is the saturation point.
- **Licensed Brands.** Gaming companies are still heavily investing in brand licensing. Licensed brands have long been used as a way to attract players, to help them achieve escape, but also to help the vendors differentiate themselves from the competition. The successful brands used in slots over the long-term have all provided an emotional connection. Many slot games that leverage brands highlighting the hero's journey and/or wealth have also performed well. But some vendors knowingly license a lesser known brand as they intend to target a subsegment of players often for just a brief period of time. With that being said, there was no shortage of licensed properties being used in the various gaming products at G2E from movies, to television shows, to musicians, to game shows, to cartoons, each angling to appeal to certain players. Curiously though, there were few games featuring recognizable titles/characters available in the public domain.
- **Little to no innovation in the gameplay.** As is often the case at G2E, the gaming content providers showcase their new gaming hardware. We all understand the business case for hardware solutions for the brick-and-mortar gaming customers and certainly appreciate it. However, there were only a few novel mechanics on the gameplay side. The bottom line is most content providers pushed their own version (or a newer version) of tried-and-true themes and features, and/or their licensed brands, and/or their new hardware, but few had innovative features or mechanics.
- **Artwork continues to improve.** The talent, the tools and the platforms continue to improve and push the envelope to deliver extraordinary graphical gaming experiences. Even the smaller market share vendors in the industry are now creating quite compelling presentations.

From Aristocrat

- Aristocrat continues to command player attention through their use of licensed brands including Mad Max, Madonna, Billions, Westworld, Game of Thrones, X-Files, B52's and more.
- Many titles feature "Mighty Cash" which uses the Hold-and-Spin mechanic to award credits or jackpots. Note that the machine's EV is reduced to allow for the EV of Mighty Cash, which means players *might* experience less of the games' other features. This is an important balancing act especially with licensed brands, as players will choose those machines to enjoy the features that showcase the various characters, songs, scenes, etc.
- "Lightning Link" is now being offered in a couple of 5-reel stepper machines in a package called "Liberty Link."
- Buffalo celebrated its 10th anniversary in a near 8-bit style. Perhaps there is something to be said for an old-school esthetic in new games.



From IGT

- Expanded use of compelling 3D graphics, as well as the use of mid-air haptic and gesture recognition technology is featured. The latter is used to uncover additional content during play.
- IGT also continues to use licensed brands for player acquisition and differentiation. This year they showcased The Price is Right, Adam Levine, Blake Shelton, American Gods, Jurassic Park, as well as the newly released Wheel of Fortune and Ghostbusters.
- A new video poker game is bundled with concepts from successful slot titles.
- "Bloomtopia" features monetary and non-monetary rewards, the latter used to increase player engagement.
- The most novel feature at the show was the use of collectible persistent symbols to trigger a feature. For example, a player collects wilds over 9 spins to use all together on the 10th spin. Or they may need to collect a number of certain symbols to be able to trigger a wild feature. All of this is intended to increase the handles per player and time on device.



From Everi

- Everi displayed new cabinets, some with 4k displays, 4.1 surround sound and curved monitors, as well as 90 original game themes—at least 15 of which that used licensed brands.
- The brands included Willie Nelson (which is not surprising given their Austin presence), Penn & Teller, Karate Kid, The Mask, Press Your Luck, as well as some throwbacks like Singin' In the Rain and Felix the Cat. Side note: the very early silent cartoons of Felix the Cat are public domain.
- Speaking of which, the Felix the Cat game is a scatter pays only machine.
- What is most striking is the irreverent artwork and sound featured in Willie Nelson, Jokers Wild, and South Park—whisky bottle and marijuana reel symbols and some colorful audio clips. It will be interesting to see if other content providers follow suit in the future.
- Also noteworthy, Everi launched a new remote game server for online content.



From Scientific Games

- Make G2E great again? Scientific Games constructed a high-walled fortress for their booth with most of the product inside. It will be interesting to see if this proved to be a disservice or if others will follow suit.
- SG highlighted their sports betting product suite and new hardware solutions, but also managed to show some of their new content in franchises like James Bond, Wizard of Oz, Willy Wonka, and Monopoly, some of which is even used in their e-table games.
- “Die Another Day” features new gadgets, ones that Bond himself would enjoy, including a sliding video display and the use of “Pepper’s Ghost,” an old magician’s trick.
- In “Ultimate Cash Spin” players get out of their chair to physically spin a wheel.
- There were a couple themes outside of the walled booth including Rocky, which appears to be a reskin of Wonder Woman.
- The sleeper in their booth might be the bar top poker solution equipped with a sleek curved screen for better viewing and unique take on the user interface.



From Novomatic and Ainsworth

- Novomatic is also showcasing electronic table games and new cabinets, but with theirs the chairs are far enough away from the huge screens that players can actually see all of the presentation without any strain.
- With 20 games coming to the North American market this year, they too are clearly trying to command player attention and differentiate themselves from the competition. Licensed brands of theirs include several iconic 80's titles like Galaga, PAC-MAN, and their headliner MacGyver.
- MacGyver features both free spins and interactive picking moments (to win a progressive) to appeal to different player types.
- Novomatic is also bringing more progressive products to the marketplace.
- Greentube online content was prominently featured as well, and even includes an interactive version of "From Dusk Till Dawn." Their 40ish studios continue to grow their over 600-game portfolio for both RMG and Social.



From Gamblit

- Gamblit continues to deliver skill-based content to the gaming industry with over 25 such games showcased at the Global Gaming Expo.
- Gamblit also invested in licensing brands, though with a slightly different slant than its competition. It used Cut the Rope, Doodle Jump, Road Redemption, PAC-MAN, and more installments of Deal or No Deal to highlight their new TriStation game machine.
- The multi-player Deal or No Deal Poker Special is a lot like the original Grab Poker, but seems like a better gaming experience.
- The single player Deal or No Deal Poker features a banker's offer for every made hand, but also retains players by adding a multiplier (up to 5x) on winning hands, which is applied to future wins.
- The most interesting sound bite we received in speaking with their booth reps is that the aforementioned game engages about a 50/50 split of male to female players, with an average age of 36.



From Eclipse

- Eclipse Gaming has been a player in Class II markets and was recently approved for the Washington X2 market.
- Great 88's pandas and golden dragons, featured on an anyway 5x3 reel array, display an unmistakable Asian-theme. This is Eclipse's premier progressive game which has 4 different levels of progressives.
- Eclipse also has game similar in appearance to another popular vendor's series in "Lightning Strikes Twice," featuring a single level progressive.
- The latest installment in the 10X Wild Multiplier series, "Bull Booster," contains a re-spin feature on a 3-reel 1-line array.



From Konami

- Konami showcased their new gaming cabinet called the Concerto Opus. It features a 65-inch screen with an impressive 4K Ultra HD 43-inch display.
- Konami incorporated some other well-known games/mechanics into their machines, such as a coin pusher and pinball, as well as continued to highlight games where the higher the bet the greater the potential win amount.
- They also continued to show reels *and* wheels in slots as demonstrated in "Celestial Sun Riches" and "Celestial Moon Riches." These games also have popular features like random credit awards, multiplying wilds (when these symbols land in the "Strike Zone"), and a jackpot, all rolled into one 3x4x4x4x3 game. Players can increase the Strike Zone by betting more.
- Konami also showed "Reels Up." When players get at least one arrow symbol on reels 1 and 2 the remaining reels can expand via more consecutive arrows to award higher credits and/or bonus reels.



From Aruze

- Aruze showcased their Muso cabinets, electronic table games featuring innovative rear projection tech, and 3 new themes. They clearly demonstrated they are investing in more than just slots.
- “Roll to Win” craps for the e-table was the feature product and uses a live dealer (but only one casino employee necessary) to manage the game play, but no actual chips. The game also has a “Streak Shooter” side bet, and contains a digital display area for advertising.
- Aruze showcased several Asian Progressive themes as well as their Cannonball feature, where cannonballs containing multipliers and jackpot wins land on the reel in the bonus and queue for upcoming spins. Expander Reels games were also exhibited.
- One of the best hardware features at G2E we experienced was the charging port on the button panel of the Muso cabinet. Simple. Brilliant.



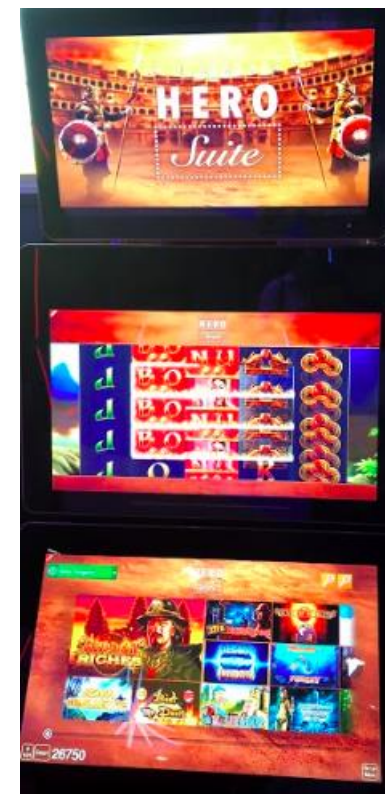
From Incredible Technologies

- Incredible Technologies has demonstrated consecutive years of growth and appears to be focused on cabinet sales as the primary driver for the future. It prominently featured its Infinity Edge cabinet and the flexibility of game banking configuration options (even including a sawtooth config).
- IncrediStars Money best demonstrates connection between games, including 4K LCD video wedges. Players play their chosen base game, but when any bonus is triggered on any machine, it triggers a common bonus event in the IncrediStar Star Wheel bonus across all players' machines. It makes for a vertically stacked multi-game experience.
- Incredible Technologies also showcased Sky Dragons, which is following on the heels of Money Rain 2 and Money Reel.



From Merkur

- Merkur Gaming is making strides to operate in North American markets though interestingly showcased many Asian style themes, like Baozang.
- Merkur also showcased a few multi-game packages for their Evostar cabinet, featuring particular genres of games including the Fantasy Suite, Hero Suite, and an Asia Suite.
- And rather than spend on any expensive brand licensing, Merkur appears to be utilizing popular American vernacular phrases like 'Taco Tuesday,' to capture players' attention. Side note: the Taco Tuesday game generated buzz with many slot enthusiasts we spoke with at the show.



From AGS

- AGS has shown extraordinary growth in recent months, as they continue to ramp up in North America as well as target jurisdictions like The Philippines and Brazil.
- AGS is angling to make products that appeal to every kind of player, from slots, to table games, to interactive players. They prominently showed their Orion Slant cabinet with 11 titles at G2E and said they are targeting to bring nearly 70 titles to market this fiscal year.
- Their slot products delivered some remarkable visuals and artistic effects as well as some great sounds.
- Like many other gaming vendors, AGS exhibited Asian progressive slot product.
- Also of interest was the white labeled interactive content they provide partners like Stars Group and Aweksasne.
- AGS continues to invest in R&D, but we wonder how aggressively they can grow without being a part of the patent pool sharing within the industry.



From Bluberi

- I Like Big Bucks and I cannot lie! The most talked about machine was the Sir Mix-A-Lot slot game by Bluber, which features the hit song "Baby Got Back," dancing peaches, and plenty of gaming features. Like some of the aforementioned machines, this one may also push the envelope with gaming regulators and players, but overall is well executed.
- Bluberi exhibited high-quality gaming experiences, a grasp of slot game math and mechanics, and particularly extraordinary artwork.
- This company has been a small player in the market, but this year showed great product and are clearly poised to strengthen their positioning.



Trends & Outlook

Trends

- Asian Progressive themes abound, plain and simple.
- Improved graphical imagery from every major content provider, but Mad Max was the clear winner.
- There seems to be many male-centric brands being used, which makes us wonder if the content providers and casinos are specifically attempting to grow that demographic player base.
- For those not wanting to spend on brand licensing, popular phrases like “Taco Tuesday,” are being used to catch players’ attention.
- From a hardware perspective, digital dividers/wedges between the EGMs is still popular. These dividers are bright and show dynamic content like progressive jackpot levels.



Outlook

- **More Asian Progressives.** It would seem these have not come close to reaching a saturation point yet in the market place, so we would expect to see more and more of them.
- **More content copying.** Many manufacturers are part of a patent pool sharing agreement, which is all the more reason we are seeing many me-too games and clones of other popular games. We only expect to see greater feature copying in the future.
- **More table game innovation.** As some vendors concentrate on their own executions of other vendors' patents or look to expand their Asian market presence through non-slot game executions, we expect to see at least a couple vendors (perhaps those not headquartered in the United States) prioritize R&D resources on table game innovations.
- **Intellectual property and licensing** of recognized brands/celebrities and the incorporation of other regional cultural elements are likely only to increase in use by content providers.
- **Increased bet up opportunities.** It is clear that games have mass appeal to players who enjoy hitting features and in rapid succession, like re-spin or collection game mechanics. As such, many games are providing clear incentives for players to increase their bets to get more of such action. We expect to see more bet-up opportunities for increased feature and win frequency in the near future.
- Whether for trust or anonymity (or both), as discussed in one G2E session, we expect to see more casinos harnessing the power of cryptocurrency and the underlying emergent technology in the future.



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