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- Clark Development Corporation
- RGB International Bhd
- D'Heights Resort and Casino
- Hann Casino Resort
- Royce Hotel & Casino
- Casino Plus
- Casino Filipino Capital
- Pradera Verde Golf Club



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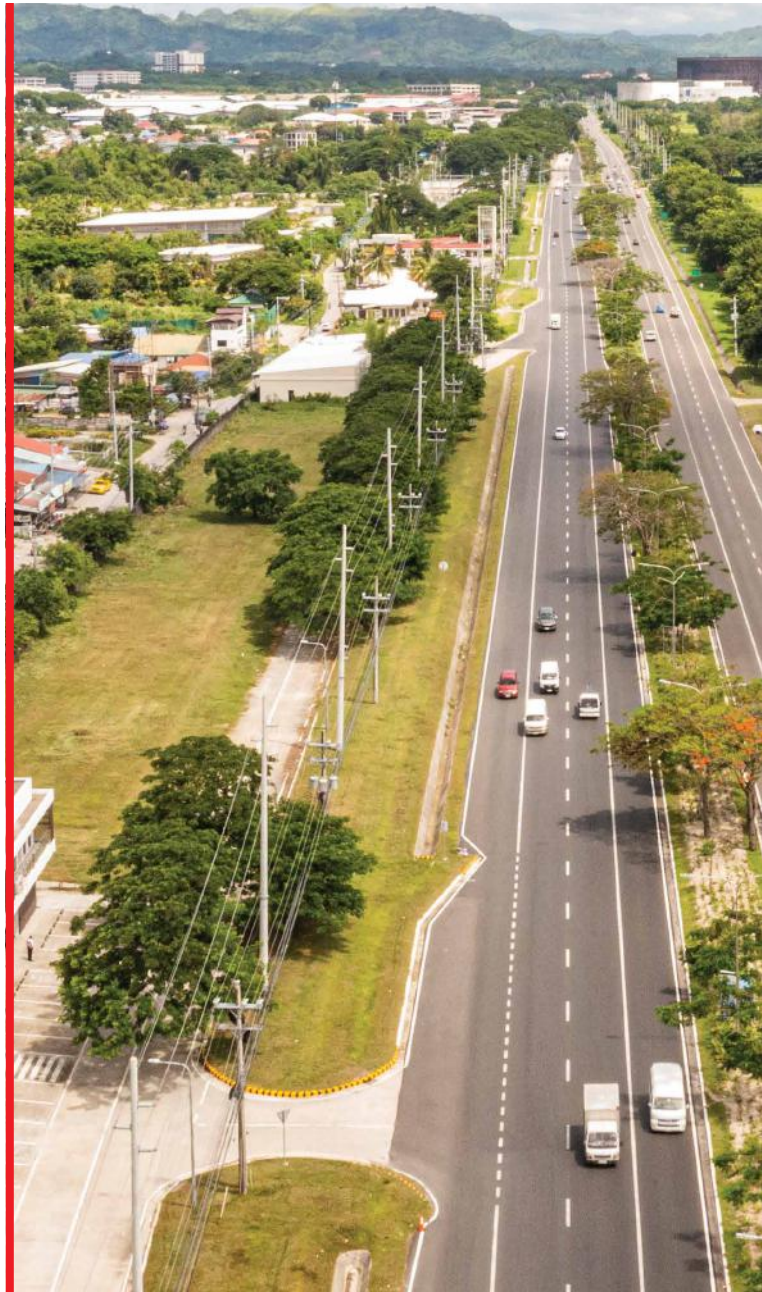


Contents

14

From the ashes: The rebirth of Clark

Once home to the US military, Clark has been reborn as a rising tourism hub and is now positioning itself on the world stage as a center for everything gaming, golf and MICE.



26

The edge of experience

Malaysia's RGB International Bhd utilizes its diverse array of service divisions to provide its clients with unrivalled support – and it has big plans for the future.



32

High and mighty

Covering 8% of the Clark Freeport Zone at 309 hectares, the sizeable D'Heights development at Sun Valley is aiming high with a new casino and hotel expansion in the works.



42

Leader of the pack

Hann Casino Resort has staked its claim as the clear market leader in Clark, but Chairman and CEO Daesik Han isn't slowing down with extensive plans for further expansion.

50

Royce on the rise

Having recently opened its spectacular Phase 2 expansion, Royce Hotel & Casino is looking to become a destination resort for travellers from far and wide.

58

Plus-sized

Hotel Stotsenberg and its rising gaming brand Casino Plus is about to embark on a multi-million dollar rebuild to bring it into line with neighboring Clark integrated resorts.

64

Capital gains

PAGCOR's local Casino Filipino operation aims to provide its players with a unique gaming experience highlighted by a "homey" feel.

70

Grand ambitions

The owner of Royce Hotel and Casino has something special to offer his customers with nearby Pradera Verde Golf Club providing a luxury golfing experience in the heart of Pampanga.





Welcome

There is definitely something happening in Clark that bodes well for the Philippine gaming industry.

With its strategic location and size, not to mention an international airport and a rapidly developing infrastructure, Clark should become one of the busiest tourist and gaming destinations in the Asia-Pacific region in the next five years.

There are plenty of reasons to be optimistic about Clark's potential. Its land area of nearly 33,000 hectares, straddling the provinces of Pampanga and Tarlac in Central Luzon, is surrounded by beautiful tourist destinations and boasts a well-developed road network.

The number of gaming destinations in Clark will also continue to increase as the area attracts more investors and locators to its New Clark City, Clark Freeport Zone and Clark Global City integrated business and residential districts.

The fusion of serene urban living, cutting edge technology and sustainability in these communities also guarantee Clark will remain a preferred destination for meeting, events and conventions, and soon as a hub for specialty medical facilities.

And we are sure all of these are just a few of the reasons why our friends from RGB International chose Clark as the venue for its biennial RGB Connect 2023 event – the first post-pandemic edition of this much anticipated industry gathering.

But we shall let you be the judge. For now, we invite you to explore new frontiers, experience the innovations and exult in the potentials of what gaming is all about in Clark.

It's all here – and more.

Alejandro H. Tengco
Chairman and CEO

Philippine Amusement and Gaming Corporation

ORGANIZER



RGB International Bhd. is a public listed company incorporated in Malaysia on 16 January 2003. RGB is an investment holding company with its subsidiaries primarily involved in:

- sales and marketing, and manufacturing of electronic gaming machines and equipment
- machine concession, technical support and management
- on-site technical solution, preventive maintenance and repair services for electronic gaming machines and equipment

The history of RGB's involvement in the supply and services in the gaming industry began way back in 1986 through its wholly owned subsidiary, RGB Sdn. Bhd. The Group is now acknowledged as a leading supplier of electronic gaming machines and casino equipment as well as a major machine concession provider.

RGB has marked its presence in Malaysia and also operates in Cambodia, Laos, Vietnam, Singapore, the Philippines, Macau, Timor-Leste and Nepal.



Inside Asian Gaming is Asia's leading B2B digital and print media brand for the gaming, resort and entertainment industry. It has the highest website traffic, social media following, digital newsletter distribution and print magazine distribution of any such brand.

Founded in 2005, *IAG* has a broad business editorial focus on the Asian gaming and integrated resort industry. It is widely distributed to industry executives throughout Macau and the rest of Asia in two formats: a monthly English and traditional Chinese fully bilingual digital and print magazine and a daily English language e-newsletter titled *IAG Breakfast Briefing*, delivered at 8am Macau time in English and 11am in traditional Chinese each weekday. *IAG* also publishes special magazine editions for G2E Asia each May and the Asian Gaming Power 50 each November.

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From the ashes

The rebirth of Clark

Once home to the US military, Clark has been reborn as a rising tourism hub and is now positioning itself on the world stage as a center for everything gaming, golf and MICE.



Once globally renowned as home to Clark Air Base – for the best part of a century the largest US-military base outside of the United States – the Philippines region of Clark is in the midst of a comprehensive transformation into a major regional tourism hub.

Located about two hours by road north of Manila, it has been identified by the national government as the country’s next major economic center, supported by the presence of an international quality runway system left behind when the US withdrew in 1991 following the eruption of Mt Pinatubo, which destroyed many of the buildings utilized by US forces at that time.

As part of efforts to rebuild the region, which spans a total of 32,000 hectares – about half the size of Singapore – in the province of Pampanga, the Philippines designated the area as a Special Economic Zone. The Clark Main Zone, an area covering 4,400 hectares including the former Clark Air Base, was designated a Freeport Zone in 2007.



Clark International Airport



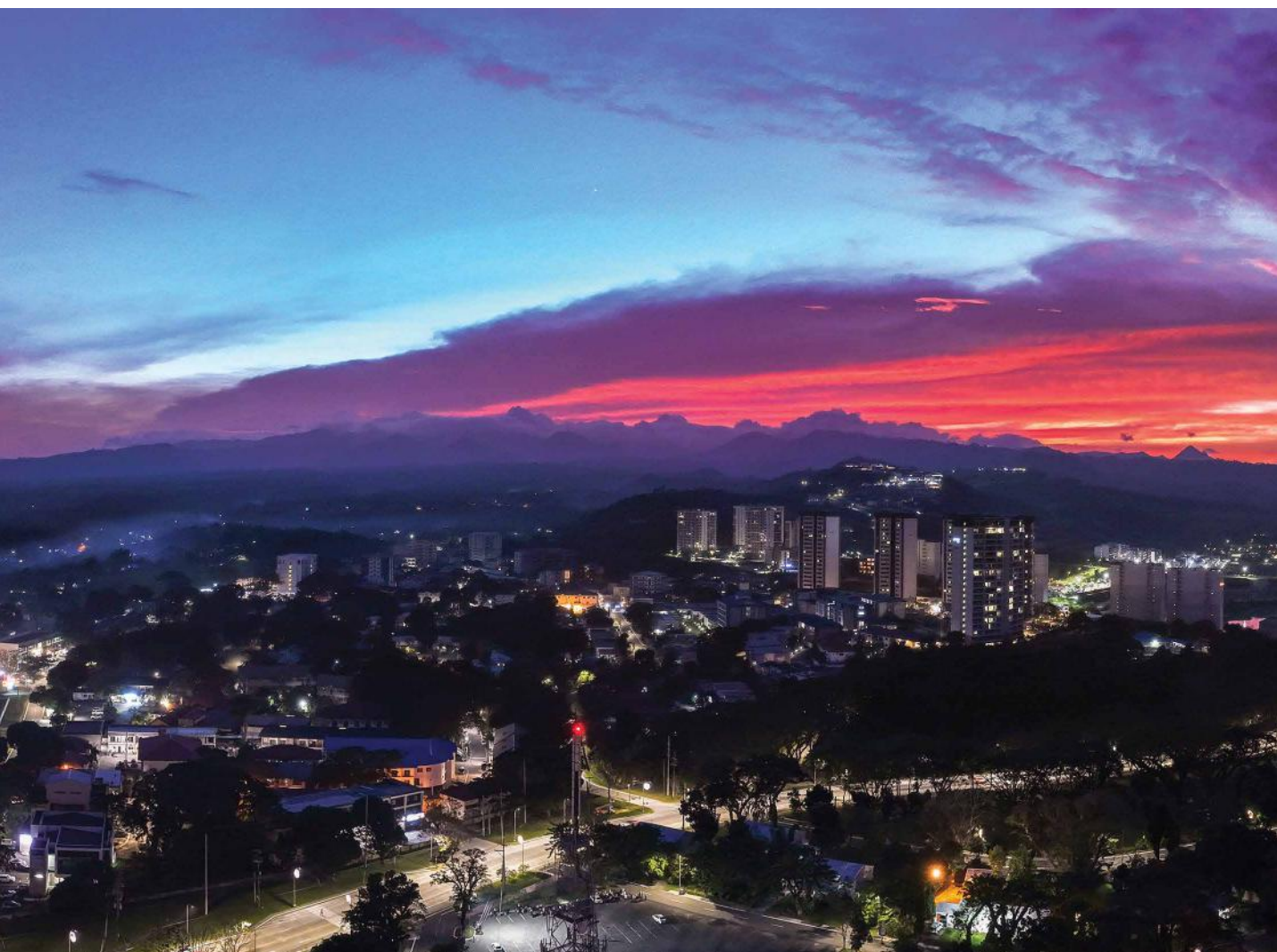
That the Clark Freeport has since emerged as a tourism destination, however, has been as much about good luck as good management.

“The interesting thing about the law that created Clark is that it was principally intended to be an investment destination, meaning it should be an industrial park,” explains Atty. Agnes Devanadera, the former Mayor of Sampaloc and Solicitor General of the Philippines who was appointed President and CEO of Clark Development Corporation (CDC) last year.

“But Clark has emerged with two faces – as an investment destination and as a tourism destination. For example, our locators now number 1,137 with more than US\$5 billion invested, but due to a combination of the facilities left by the Americans and the natural features like the century-old trees and the parade grounds, it has naturally emerged as a tourism destination.”

Qualified locators setting up inside the Freeport pay just 5% tax on gross income earned, less allowable deductions, in lieu of all national and local taxes, and are not required to pay property tax. They also face far less red tape than may be expected elsewhere due to the CDC holding absolute governance of the broader Clark area.

It is this combination of Clark’s Freeport status, a simpler governance system and its wide expanses of green space that has opened the door for tourism investors to devise a unique model for the area, with gaming and golf working hand in hand to attract clientele looking for something different from the large-scale glitz of Manila’s integrated resorts, or its regional peers in jurisdictions like Macau and Singapore.



It also explains why Clark has become a favorite escape for travellers from South Korea – the area’s number one source market – and for those from emerging markets like Taiwan and Japan.

Early investors into Clark’s casino space, such as Hann Resorts Chairman and CEO Daesik Han and Royce Hotel and Casino owner Rodolfo Pineda, recognized the opportunities that having a world-class international airport presented to the area and have played a major role in the region’s recent rise.

While there are currently six privately-run casinos in Clark – the others being D’Heights Resort and Casino, Midori Clark Hotel and Casino, Casino Plus at Hotel Stotsenberg and Fontana Leisure

Parks and Casino – as well as the PAGCOR-run Casino Filipino Capital at Xenia Hotel – it is the more recent multi-million dollar investments of Hann and Royce that have really put Clark Freeport Zone on the international map.

In 2021, Hann unveiled its US\$250 million expansion of the old Widus Hotel and Casino, adding 130,000 square meters including a world-class gaming space, the Philippines’ first Swissôtel, specialty dining options, retail, a swimming pool, an executive lounge plus event venues such as a ballroom and function rooms.

Earlier this year Royce followed suit with a similar expansion that includes Clark’s largest

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Kangwon Land features the only casino among 17 casinos in Korea that is open to local citizens, and High1 Resort, a resort-brand complex where you can enjoy nature, relaxation, and popular attractions. In this way, we contribute to improving the lives of the public and promoting national happiness by leading the leisure vacation culture.

In addition, it is developing into a top tourist hub in Korea through continuous investment and integration with the tourism business that is being planned and developed in the surrounding vicinity



KL Saberi

Kangwon Land Casino, KL Saberi's team of experts and developers is dedicated to developing cutting-edge slot machines.

With our extensive experience running Korea's largest casino, we have branched out into the manufacturing of slot machines.

'First emperor' star alignment & 'Mayan pyramids' star alignment

- It is the latest Hold & Spin game of KL Saberi
- When star alignment feature is awarded, the random multipliers are applied, followed by 12 patterns. Also, players will get an additional prize, when a certain pattern is won.

gaming floor covering 27,000 square meters, a new hotel with 297 rooms, plus dining, retail, MICE space and a pool.

In the months and years ahead, both Hotel Stotsenberg and D'Heights will complete expansion projects of their own in an effort to keep up with demand while providing the type of five-star facilities international gaming and leisure guests expect. It is even rumored that the CDC is seeking investors to rejuvenate Fontana, which has largely fallen into disrepair in recent years.

Notably, demand remains far from being satisfied. At the IAG Academy Summit held at Hilton

Manila, Newport World Resorts in September, Atty. Devanadera told attendees during a Keynote Address that the CDC was "managing" the number of casino developments it allows despite having "many applicants" awaiting approval. It is believed that up to half a dozen companies have been granted provisional gaming licenses to operate in the Clark Freeport by gaming regulator PAGCOR, however of greater concern to the CDC right now is the lack of high-end hotel rooms to cater to the region's long-term ambitions.

These ambitions, the CDC has previously explained, are to move the manufacturing investors



Clark Development Corporation President and CEO, Atty. Agnes Devanadera



in Clark to a nearby area known as New Clark City (a newly planned community covering 9,450-hectares located 30km to the north and set to be linked to Clark by highway), allowing the freeport to focus its energies on pure tourism and MICE (Meetings, Incentives, Conferences, Exhibitions).

It is with this in mind that the CDC bid for, and won, rights to host the Philippines' MICE Con 2024 in partnership with the Tourism Promotions Board and the Department of Tourism.

"MICE is something we are working for and that's really by design," Devanadera says. "We have about 4,000 hotel rooms [in Clark] already and we have the international airport."

While Clark does need more hotel rooms and more convention space if it is to become a MICE hub – weekend hotel occupancy rates average around





98% – the CDC chief notes that local and national government officials are increasingly holding their strategic planning meetings in the area as they look to escape the Manila rat race.

So what's the broader appeal of Clark?


"It's a very unique culture here," offers Evan Spytma, CEO of Hotel Stotsenberg Leisure Park and Hotel Corporation.

"Clark has this opportunity to be unlike any other gaming area in the world. It's unlike Singapore or Macau – this whole environment is much more relaxed. It's safer with all of the fun but none of the hassle of what you would find in Manila, for example.

"The airport in Manila is operating at double its capacity right now as opposed to Clark, which is at 50% capacity. Airlines are opening up new routes every single month and the government is already focused on expansion to plan for future growth. It's the same with the streets, so you're still going to have that 'All the fun, none of the hassle' type of culture where if I want to go down the street, it's not going to take me an hour to get there. If there's a nice restaurant, it's not going to take an hour to get there and an hour to come back.

"We want the players to be playing, having fun and not thinking about all the other hassles that come along with the location."

Infrastructure has been key to Clark's rise. Last year, the first of four new passenger terminals planned for the former air base – now Clark International Airport – was opened, tripling the annual passenger capacity from its previous level of 4.2 million to 12.2 million. By the time the fourth terminal opens in the years ahead, annual capacity will be a massive 110 million people.



Complementing the air access is better road and rail infrastructure, most notable being the US\$15 billion North-South Commuter Railway connecting Clark and Manila, including a link between Clark International Airport and Manila's Ninoy Aquino International Airport, opening in stages from 2021. Construction began earlier this year.

Operators that *IAG* spoke to said greater airlift is still needed, particularly to expansion markets such as Malaysia and Vietnam which currently have no direct connection. However, flights to and from Korea are now at seven per day, and Eva Air became the first Taiwanese airline to launch a Taipei-Clark route back in April. A second, STARLUX, inaugurated the same route in August.

"We can definitely see more and more improvement in terms of air travel," notes



Hann Resorts Assistant Vice President for Casino Marketing, Ryi Lim. “In the past, even six months ago, would I see any Chinese walking in saying, ‘I want to be a member’? I would say no, but recently we started to see Taiwanese coming in and saying, ‘I want to be part of your rolling program’.”

Devanadera says the CDC is actively targeting Taiwan as a key growth market, while Japan has potential too.

The benefit of Clark’s growth can be seen in figures released by gaming regulator PAGCOR. Clark casinos generated gross gaming revenues of Php8.66 billion (US\$153 million) in 2018, but this has grown rapidly to Php12.17 billion (US\$215 million) in 2019 and to Php20.64 billion (US\$364 million) in 2022. GGR for the first six months of 2023

was already nearing that FY22 figure at Php16.15 billion (US\$285 million).

According to Devanadera, future growth in the gaming industry will be prompted by the addition of more high-end integrated resorts like those seen at Hann and Royce.

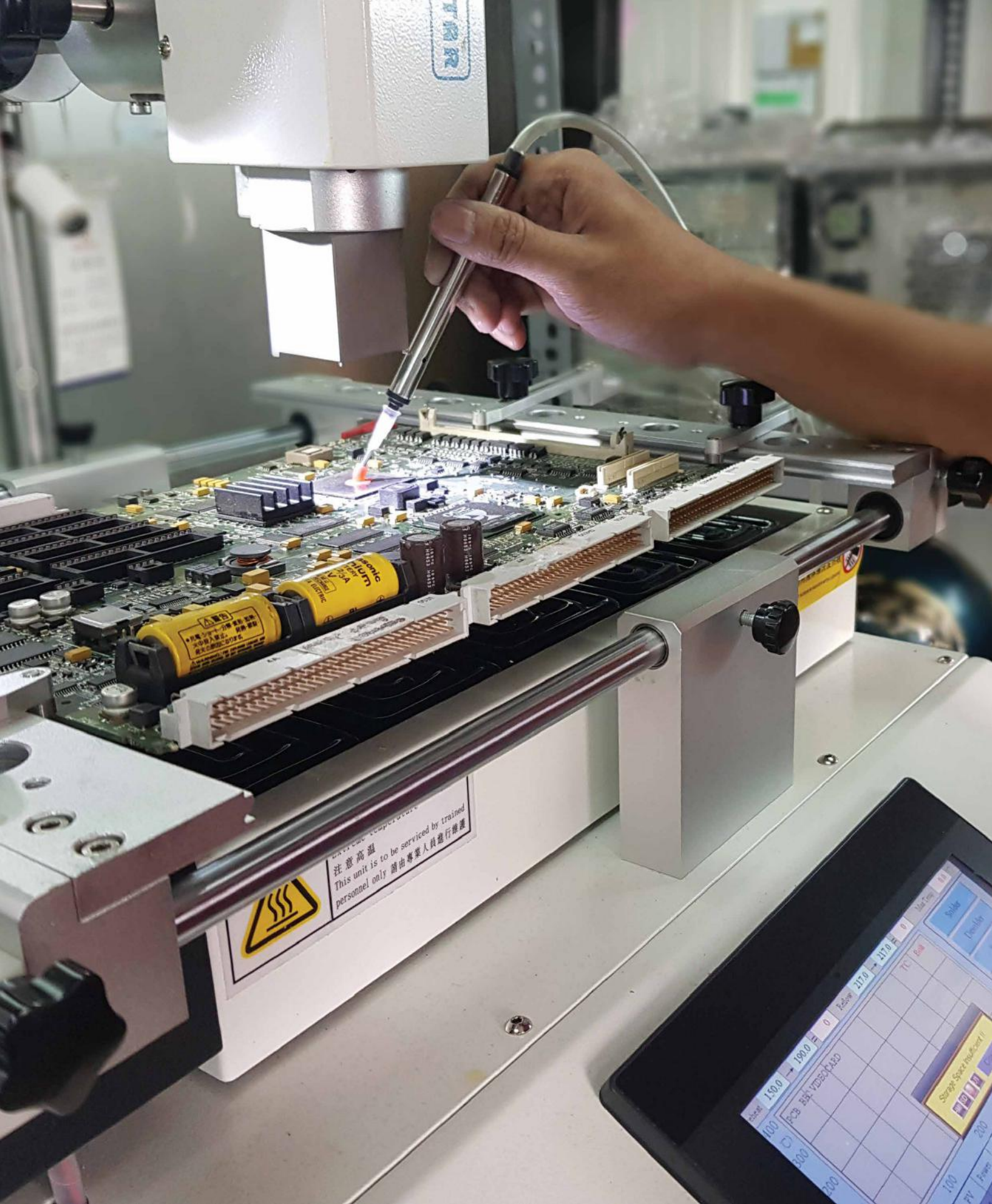
“But aside from that, we also would like to encourage investments in things like hotels and even theme parks,” she said. “That’s the new challenge, to increase investment and to increase tourists. But this is a problem that we welcome.

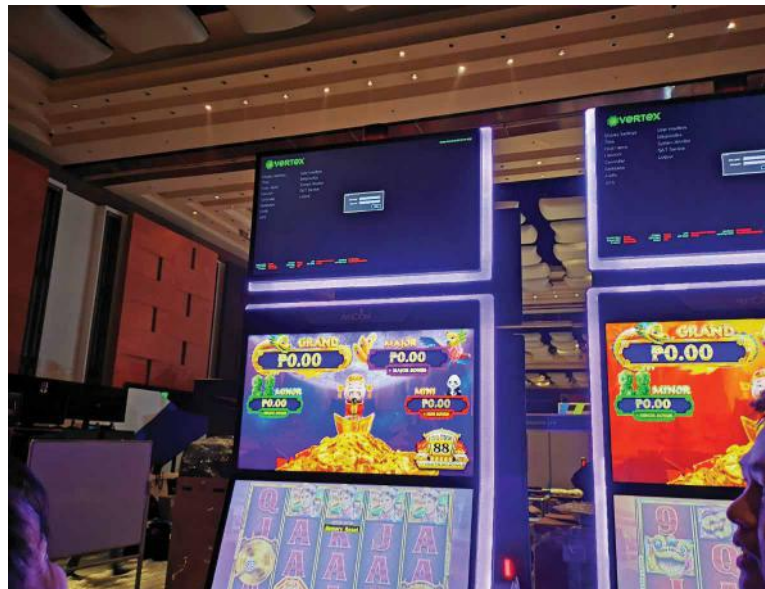
“Hopefully in 10 years’ time we will be able to attain what we want to have, which is to transform this to a regional hub – regional from the point of view of ASEAN, not just from the point of view of the domestic region.” **RGR**



The edge of experience

Malaysia's RGB International Bhd utilizes its diverse array of service divisions to provide its clients with unrivalled support – and it has big plans for the future.





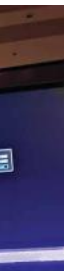
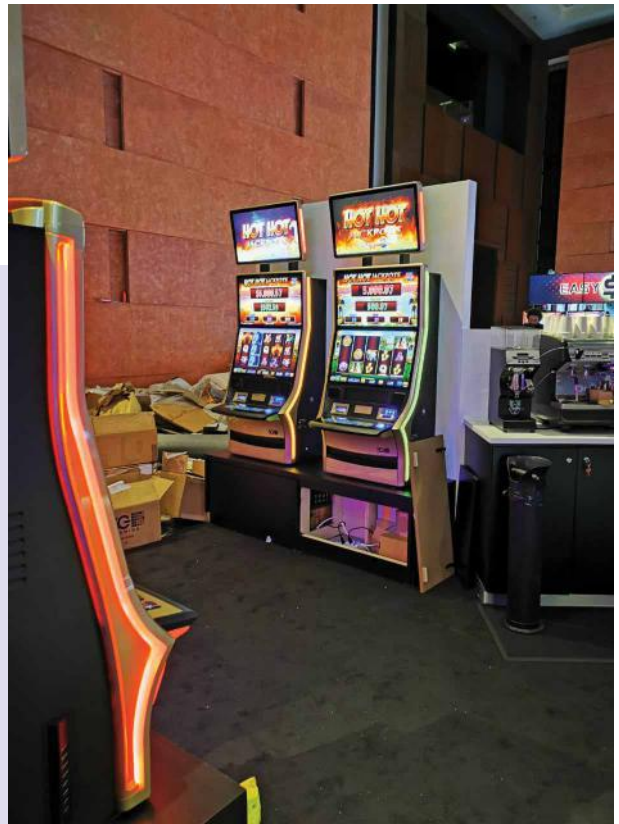
Established in 1986 as a small trading company engaged in the distribution of electronic gaming machines (EGMs), RGB International has over the past 37 years cemented its position as a leading provider of integrated gaming solutions, with its footprint spread across Malaysia, Cambodia, Lao PDR, Vietnam, Singapore, the Philippines, Macau, Timor-Leste and Nepal.

With a focus on the distribution and provision of technical support for EGMs, casino equipment and management systems as well as being a major machine concession provider, RGB holds a unique place in the industry as the only distributor to offer such a diverse presence across so many divisions.

The company is a leading supplier of world-renowned EGM and casino equipment brands via its Sales & Marketing (SSM) division; and is a partner of licensed operators throughout Southeast Asia with approximately 5,000 machines stationed across 41 outlets under its Machine Concession, Technical Support and Management (TSM) division. Of these 41 outlets, 30 are located in the Philippines.

RGB also provides engineering services with end-to-end support for SSM and TSM clients including on-site machine installation and technical solutions, preventive maintenance and repair services for EGMs and equipment, and EGM technical and casino management system (CMS) consultancy.

It is this diversified business model that allows RGB to add extra value for its clients and vendors. Utilizing its decades of business intelligence in the gaming industry, its strong understanding of macro





RGB Chief Operating Officer, Datuk Steven Lim Tow Boon

and micro market trends and its vast quantity of on-the-ground information, RGB tailors proposals that suit the specific needs of its clients for both new and existing projects.

For example, through the company's machine concession business, RGB gains insights into players' gaming styles and preferences when it comes to brands and games across different regions. Moreover, as a key distributor of major brands in the market, it has in-depth knowledge of each brand's machine characteristics. With this business intelligence, RGB has proven itself able to help clients strategize their machine mix and floor plan design, which in turn drives visitation and optimizes revenue.

RGB's strong technical team provides round the clock service in key regions, meaning customers can rely on RGB as their turnkey solution provider, reducing the hassle of dealing with a large pool of vendors and streamlining their in-house technical workforce.

The company's comprehensive engineering services include product installation, machine relocation, game conversion, gaming equipment support and services, product and scenario-based training solutions, EGM technical and casino management system consultancy, EGM preventive maintenance programs, CMS turnkey solutions, and gaming parts and repair services.

RGB runs a sustainable business model, whereby it is able to capture the industry's capex cycle through the outright sales of machines as well as generating stable recurring income through

its machine concession business. As such, its services are appropriate for gaming facilities of all sizes, from boutique outlets with just a handful of machines through to integrated resorts with thousands of machines on the gaming floor.

Yet RGB isn't taking its success for granted. Always ready to diversify, the company sees huge potential in several emerging trends in the gaming industry, including in the digital space.

"We have recently set up a new team focusing on the development of cashless and mobile solutions," explains Datuk Steven Lim Tow Boon, RGB's Chief Operating Officer. "The pandemic has accelerated a move to cashless in just about every sphere, but casinos are still lagging behind the curve. The adoption of cashless gaming in land-based casinos is still low, especially in Southeast Asian markets.

"With the establishment of this new development team, coupled with RGB's in-depth understanding on the industry's payment mechanism, we envision that RGB could introduce a mobile solution that allows consumers to have cashless payment across casinos in the same country. We have established a three-year roadmap to achieve such purpose.

"In a nutshell, RGB firmly believes that forging strong partnerships with our stakeholders and continuously exploring and unlocking new growth opportunities are key for the company to achieve greater heights.

"With the vision of becoming a premier integrated gaming solutions specialist, we are hopeful to be a contributor in transforming the gaming industry in the Southeast Asia and beyond." **RGB**



High and mighty

Covering 8% of the Clark Freeport Zone at 309 hectares, the sizeable D'Heights development at Sun Valley is aiming high with a new casino and hotel expansion in the works.





MASTER PLAN

“In terms of area, we are the real Integrated Resort (IR) in the Clark Freeport Zone,” says Ernesto Gorospe, Vice President of Business Operations and External Relations for Clark’s D’Heights Resort and Casino. “The others may call themselves IRs but we are the only one with the space to build and expand as we go in terms of the type of business we want to develop. We have one of the most diversified business and product offerings among all the IR licensees in the country.”

With a whopping 309 hectares at its disposal, D’Heights accounts for 8% of the Clark Freeport Zone and has grand ambitions to match its grand size. Utilizing the experience of its owner, Korean-owned developer Donggwang Clark Corporation, D’Heights currently boasts two 18-hole golf courses at its Clark Sun Valley Golf & Country Club, a 310-room Hilton Hotel, a Singapore School offering education standards and curriculum recognized by



Work is already underway on an expansion of the existing casino and hotel space.

both American and British educational systems for students between Kindergarten and Year 12, a business park, thirteen (13) towers of condominium towers with 936 condominiums, and 52 villas.

Also in planning are another 47 high-end villas located along the property's mountaintop, a shopping arcade and commercial district, a water park, separate amusement park and an extension to the business park operations. The company will invest an additional Php 20 billion for these projects in the next 15 years.

"We do have a lot of land although the land is rolling and steep, so the total build will be about 60 or 70 hectares," explains Marketing Director,



Bernie Angeles. “It’s very challenging to develop this land but we are doing it. The long-term plan is to become a major player in the hotel and casino industry. We expect that upon completion of these development projects, D’Heights Resort and Casino will be the landmark tourism destination in the Clark Freeport Zone.”

And this is where D’Heights senses genuine opportunity. Granted a casino license on 12 July 2017 and opening its casino two years later in July 2019, D’Heights boasts one of Clark’s largest casino operations with 124 gaming tables, five poker tables and 520 electronic gaming machines – the latter comprising 466 slots, 38 ETGs and 26

horse derby terminals. A 310-room Hilton hotel sits above.

Koreans and other international players comprise the vast majority of junket customers, explains Director of Casino Operations Eduardo Dacanay, which is also the reason for a massive development project currently underway to expand casino, hotel and commercial facilities front and center of the property. Targeted for completion in 2025, the additional facilities are strategically positioned alongside the natural lake that catches your eye as you drive into the property and designed to further enhance the gaming and lifestyle experience at D’Heights Resort and Casino.

This casino and 300 room hotel expansion will double the current gaming and hotel inventory – making it the largest IR operator in Clark based on current numbers

“We are second in Clark at the moment but we’re catching up,” Dacanay smiles.

Casino aside, D’Heights markets itself as a lifestyle choice. Take the long and winding drive up to the impressively fitted clubhouse – providing direct access to both the members-only Sun Valley Course and the Clark Course – and you’ll find yourself standing 1,750 feet above sea level with sweeping views across the spectacular mountain range, which includes Mt Pinatubo.

It is these views that have proved the selling point for the property’s villas. According to Angeles, “most of the buyers are foreigners who come here maybe two or three weeks each year.

“Some bought it with a plan of eventually retiring here and getting a Philippines retirement visa,” he says. “Most of them, about 65%, are Asians, 25% are North Americans and Europeans, and the rest are Filipinos.”

Development of the 47 new “high-end” villas is only just beginning, and Angeles smiles when he says, “You cannot find these high-end residential developments anywhere else north of Metro Manila. These are located on some of the highest peaks within the property offering scenic views of the mountain ranges in the west and panoramic views in the east. The villas offer amenities in luxurious settings including security and privacy in a gated community. You should buy one, you’ll like it here.”

Only 50 of the 936 condominiums remain unsold, he adds. The popularity of the condo sales in Clark are due to the company’s experience and track





(L to R) D'Heights executives Bernie Angeles, Eduardo Dacanay and Ernesto Gorospe.

record in building similar property developments in Korea where the company brands have been well established.

Current investment is approaching US\$400 million and it will take another US\$400 million to complete the remaining infrastructure, currently pegged for 2038. Other developments may follow, with Angeles noting, "We work very closely with the Clark Development Corporation and we are fully supportive of their strategic goals and their development plans. All our development plans are in-line with those strategic goals for Clark which are tourism, hospitality and ICT (information and communication technologies)."

Adds Gorospe, "We are already one of the largest investors in Clark and our Chairman was one of the very first large foreign investors to put his confidence in Clark when no one else was doing it. We are one of the major investors, major

revenue earners and one of the largest employers too. When fully developed, D'Heights Resort and Casino will play a contribute substantially in solidifying Clark's role as a preferred MICE destination in the Philippines "

Ultimately, explains Angeles, size matters.

"If you look at us from the outside, it might seem that our development is sparse because of the vast land, but I think the biggest of the [other] IRs here in Clark is only 13 hectares which is not even 5% of our land. If you put all of our developments into one cluster, we will still be bigger.

"I look at the distinct features of D'Heights and it's very different from the others. We are not on the main strip, we have these expansive views, if you are here you can do a whole lot of different things that we are only going to add to in the coming years. I think that will really set us apart from the others with all of our facilities." **RGB**

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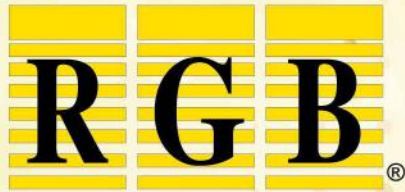
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TSM
Technical Support
Management

**Engineering
Services**

SSM Sales & Marketing

Distribution of electronic gaming machines, casino products and equipment.

TSM Technical Support Management

Machine concession, technical support and management.

Engineering Services

On-site technical solutions, preventive maintenance and repair services, machines turnkey installation and system integration.

OUR CORE BUSINESSES



Leader of the pack

Hann Casino Resort has staked its claim as the clear market leader in Clark, but Chairman and CEO Daesik Han isn't slowing down with extensive plans for further expansion on both the current site and in New Clark City.




HANN
CASINO RESORT



While operators across the Clark Freeport Zone are implementing ambitious expansion plans with a view to capitalizing on the region's tourism boom, one name stands out as a clear market leader and the one raising the bar for everyone else to aspire to.

Hann Resorts set a new standard for luxury in Clark when it opened Hann Casino Resort in December 2021, the center piece of a US\$250 million expansion of the old Widus Hotel and Casino.

Covering 110,000 square meters, Hann Casino Resort provides Clark's first truly world-class gaming space with 176 gaming tables and around 980 slot machines, plus the Philippines' first Swissôtel, to complement the existing Clark Marriott Hotel. Plans are currently in place to expand these facilities, both via a complete refurbishment of

Widus and the development of another new hotel behind Clark Marriott. This would include the addition of between 50 to 70 gaming tables and 300 to 400 slot machines, with Hann's Assistant Vice President for Casino Marketing, Ryi Lim, noting that current inventory is basically at capacity.

"Last weekend we had around 950 [of the 980 in total] machines in use," she told the *IAG* team when we visited the property recently.

But Dae Sik Han, the company's visionary Chairman and CEO, isn't finished there. In late 2019 the company revealed it had leased around 450 hectares of land in nearby New Clark City where it will develop three golf courses and more hotels from Accor and Marriott International as part of a new integrated development it has since branded Hann Reserve. Coming at a cost of US\$3 billion once fully realized over the next decade, Hann



An artist's impression of Hann Reserve

Reserve is described as an “integrated leisure and lifestyle development”, not only providing a luxury experience for local and international tourists but adding a mixed-use commercial center, retail, residences, an international school, and a casino, among other facilities.

The three 18-hole golf courses – to comprise a “valley course” designed by South Korean professional golfer KJ Choi, a “river course” designed by Nick Faldo and a “mountain course” designed by Nicklaus Design – will include PGA-accredited player development facilities as part of



Hann Resorts broke ground on its golf resort project, Hann Reserve, in November 2022 in a ceremony attended by golfing legend Nick Faldo (third from right)

Mr Han's vision of positioning Clark among the world's top golf tourism destinations.

Lim describes the Hann Reserve development as "ultra-luxury" with the goal of taking the company's already impressive offerings to a whole new level. The two locations would, however, remain interconnected, allowing customers to immerse themselves in the Hann Reserve lifestyle or to enjoy the convenience of Hann Casino Resort with its proximity to the Angeles City nightlife.

"I think what we want to achieve first and foremost is a level of service differentiation at both properties, and for our customers the two properties will be very well connected in terms of an app – this is what we have in mind," Lim says. "As long as you are part of Hann you will have all this connectivity."

Meanwhile, Hann Casino Resort continues to dominate the Clark market thanks to a strong domestic customer base that contributes around 60% of GGR, plus a growing international contingent.

Among this, it is the premium mass segment that Lim describes as Hann's "bread and butter", accounting for around 75% of all high-end play.

"If you ask me what my focus is, I focus on the premium mass," she explains, noting that the property continues to boast strong appeal to both domestic and international customers.

"The Philippines market is probably number one but I really have two number ones with the Korea market as well, so these markets are really my focus – trying to leverage on the premium mass customers."

On the VIP side, Hann currently has three junkets – all Korea facing – but has recently established a new marketing team to help forge partnerships with junkets from across Asia, including China.



“Hopefully by next year we’ll be able to actually increase the number of junkets that we have over here,” Lim says. “But while waiting for those junkets to join us, we are trying to target the Southeast Asian market and the Taiwanese market.

“Taiwan is actually very promising. We know there is a group of people frequently visiting the Philippines, so this is the market that we’re also trying to leverage on.”

The other growth area, adds Lim, is PIGO (Philippines Inland Gaming Operators), with Hann –

like many of its industry peers nationwide – already in the process of dedicating some floor space to remote gaming operations.

But no matter the segment, Lim is under no illusions as to what it is that is driving Hann’s success.

“I was at Widus for a very short period of time before transitioning over to Hann, but I think the biggest change for us was not about infrastructure – it was about mindset and perception. The staff is now being tuned to the fact that we want to be the

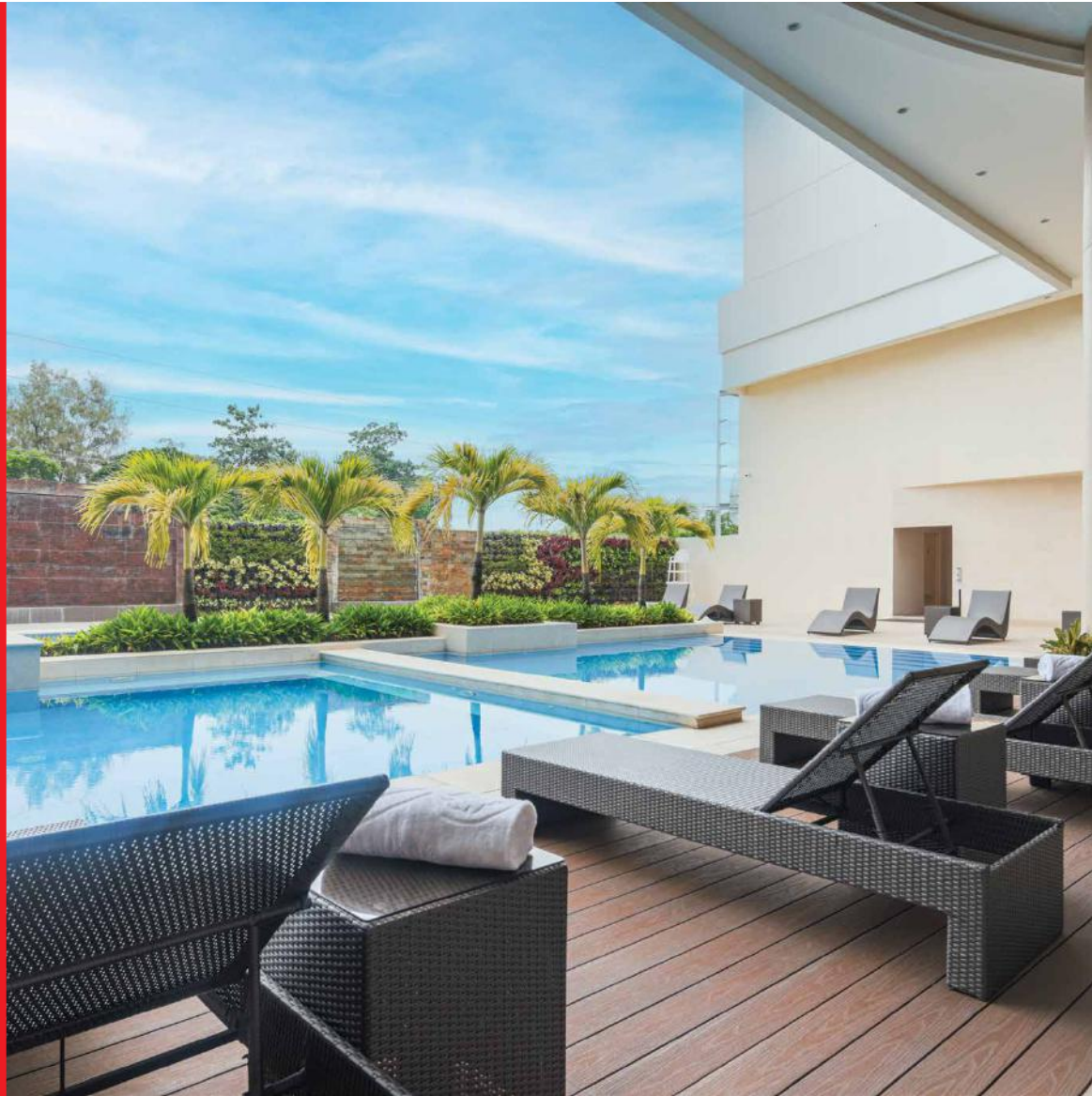


market leader and they understand now what guest experience is about and why it is so important.

"I remember when we had our very first appreciation dinner for our local Filipinos and we said to them, 'It's true we are not as big as our competitors in Manila or in Macau – we don't have a theme park here – but what we can offer is a difference in human relationships'.

"What guests experience at Hann is very different from what they can experience elsewhere, and I think that is our greatest advantage." **RGB**





Royce on the rise

Having recently opened its spectacular Phase 2 expansion, Royce Hotel & Casino is looking to become a destination resort for travellers from far and wide.





Boasting prime position midway along Clark Freeport Zone’s main drag, Manuel A. Roxas Highway, Royce Hotel & Casino has come a long way over the past decade.

Purchased by its current owner Rodolfo Pineda—the President of Eight Integrated Development Corporation and father of Pampanga Governor Dennis Pineda – back in 2014, the property formerly known as Oxford Casino boasted just 12 gaming tables and 170 slot machines at that time. In 2016, Pineda ordered an initial expansion that took the inventory to 58 tables (including four poker tables)

and 304 machines, however it is the recently completed Phase 2 expansion that has really raised the bar.

Aside from a high-end hotel adding 297 hotel rooms to the inventory, the opening of Phase 2 has also created Clark’s largest gaming floor, covering 27,000 square meters with space for 150 gaming tables and 1,500 slot machines.

According to Assistant General Manager, Albert Santos, the expansion project “reflects [Royce’s] commitment to growth, innovation and an unwavering dedication to providing the utmost hospitality.



“The motivation behind the development of Royce Hotel and Casino into an integrated resort is deeply rooted in the commitment to advancing tourism, supporting the Clark Development Corporation (CDC) and Pampanga, and providing sustainable livelihoods to the local community,” he explains. “This is driven by the dedication of Eight Integrated Development Corporation in showcasing the rich cultural heritage and natural splendor of the region, drawing visitors from far and wide.”

The new look Royce Hotel and Casino – unmissable with its giant exterior LED screen showcasing its latest offerings to passing traffic – takes the property’s total hotel room inventory to 500 rooms, including 203 in the “Deluxe” building and 297 rooms and suites in the “Premium” building.





There is also a well-appointed ballroom and function rooms for special events and a raft of food and beverage options, including 21 All Day Dining – with possibly the best breakfast buffet in town – plus Amare by Chef Chris, Café Rodolfo, Choi Garden Clark, Empire Bar and Restaurant, and the Orbit Bar.

About an hour’s drive away in Lubao, Mr Pineda has also developed a spectacular golf resort to cater to guests of Royce, including a 36-hole golf course that is regularly fully booked and plans for a theme park, described as similar to Enchanted Kingdom in Laguna or a small-scale Disneyland.

Like many of its Clark peers, this expansion strategy is aimed at diversifying the customer base

away from a purely locals focus to capitalize on the influx of international tourists, particularly those from South Korea.

While locals will remain an important part of the customer mix, “We have now redirected our strategic efforts towards the international tourism industry, with a specific emphasis on capturing the lucrative Chinese and Korean markets,” Santos says. “And we have initiated collaborations with prominent junket operators, who will play a key role in facilitating our expansion and success in these target markets.

“We are strategically located close to an international airport ... this opens opportunities



to capture domestic and international visitors, which increases the potential for expanding our customer base.

“Additionally, the region has a booming tourism industry, with an increasing influx of tourists seeking entertainment and leisure options. This represents a significant market opportunity for casino resorts, allowing them to attract a diverse customer base.”

But Mr Pineda isn’t resting on his laurels, even with the paint barely dry on his Phase 2 expansion project. Longer-term, the plan is to create “Royce City” – a wide-reaching concept encompassing interconnected properties through subterranean connectivity within a mixed-use, multi-level development. The ambitious undertaking includes plans for shopping centers, residential condominiums, office tower floors, integrated resorts and various recreation facilities.

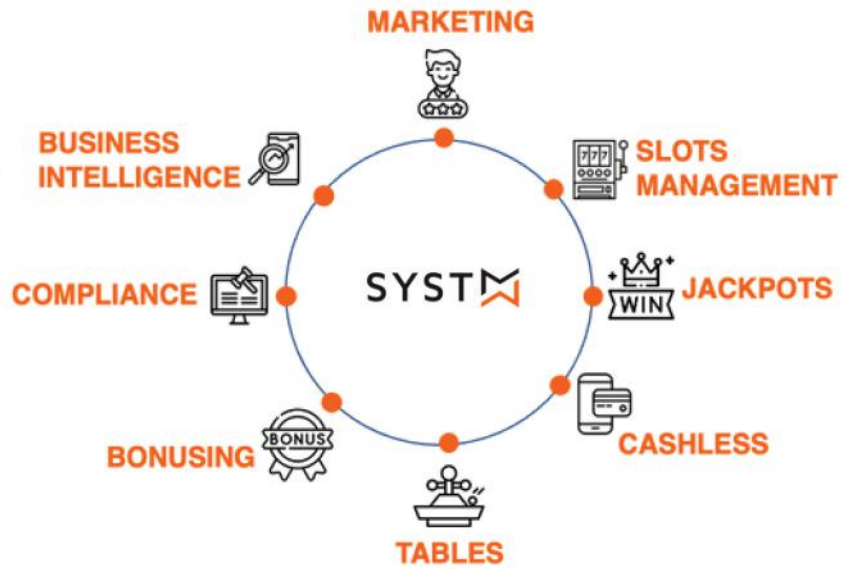
“By seamlessly integrating these elements, we aim to redefine the guest experience, offer a multifaceted lifestyle, and further contribute to the vibrant growth of the Clark area as a thriving destination,” Santos beams.

“This visionary expansion underscores our commitment to continuous improvement and innovation, enhancing our offerings and the community’s prospects for the future.” **RGB**

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Plus-sized

Hotel Stotsenberg and its rising gaming brand Casino Plus is about to embark on a multi-million dollar rebuild to bring it into line with neighboring Clark integrated resorts.





Clark is growing at a rapid rate, and one of its long-term residents is recognizing the time has come for it to do the same.

Hotel Stotsenberg, named after 19th Century US Army Colonel John Stotsenberg – who was killed in battle in Bulacan in 1899 – and one of the first “high-end” hotels in Clark when it opened in 1991, is about to undergo a comprehensive US\$100 million overhaul designed to bring it back in line with regional competitors such as Hann Casino Resort and Royce Hotel and Casino.

The major expansion project will see most of the current property torn down and replaced with a new five-star hotel and convention hall, while the main casino space will grow by “two to three times what you see here today,” according to Evan Spytma, the recently appointed CEO of Hotel Stotsenberg Leisure Park and Hotel Corporation.

Brought in to oversee the hotel's expansion efforts, Spytma notes that while the company will continue to cater to the locals' market, there is also a need to provide facilities that meet the expectations of the rising international scene too.

"We have very strong roots in the community here but as time passes, everything needs to be upgraded," he explains. "We have been very much focused on the mass market, the Filipino market, and not so much on the VIP side of things.

"But as Clark has continued to expand, we've seen more foreigners coming into Clark and the demands from a casino perspective, an integrated resort perspective, continue to change."

So, what exactly does US\$100 million buy?

"We've got a lot of plans for the property," Spytma continues. "We're going to essentially start anew, so all of what you see today will be renovated, completely torn down and a five-star hotel added. The convention hall will also be enlarged, the main casino space is going to expand probably to about two to three times its current size – we're going to put in a massive amount of investment here in Clark."

That investment represents the latest evolution of Hotel Stotsenberg's gaming floor, which has in years past gone by the name Casablanca Casino and more recently Fortunegate Clark Casino.

Now guests are greeted by a large neon sign as they enter which reads "Casino Plus" – a reference



to the growing importance of the company's Casino Plus brand, currently boasting around 40 gaming tables and 250 slots.

"We've created some fun, interactive games that you won't see anywhere else in the world and one of them is our color game (players bet on colors corresponding to where they believe three rolled dice will land)," he says.

"That is actually a game that is not on any other casino floor in the world. It's a carnival game that all Filipinos grew up with. And we thought, why not start making Filipino games? A game like baccarat seems very foreign to them but these kind of carnival games are something that they've grown up with, it's very easy to understand and it's got a special place in their heart."

Despite such growing focus on the online or remote gaming sector, Spytma says the decision to invest so heavily in Stotsenberg's physical offerings is a nod to the diversity of opportunities Clark now offers to tourism and leisure operators.

"Casino Plus has been a huge success and now what we need to do is invest locally with the new infrastructure of the hotel," he says. "Just as governments are always expanding and improving, we have to do the same here. We're going to be doubling our size, so it's exciting times and we've got some aggressive plans in place.

"I think naturally, once we have the facilities on site that are more foreign friendly, we'll see more of that population move in, but we don't want to lose touch with that domestic market. Over the course of the next two or three years, we'll still continue to expand that marketplace, and then once the facilities are here, then the foreigners and VIPs will come too." **RGB**







Capital gains

PAGCOR's local Casino Filipino operation aims to provide its players with a unique gaming experience highlighted by a "homey" feel.

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Opened in 2021, Casino Filipino Capital is PAGCOR's casino operation in the Clark Freeport Zone, relocated following the closure of its previous base at nearby Mimosa during the early days of the COVID-19 pandemic.

Situated in Xenia Hotel – just around the corner from the likes of Hann Casino Resort, Royce Hotel and Casino, and Midori – the site previously housed Pokhara Junket Casino, a local junket operator targeting international visitors, mainly from South Korea. But, recognizing the need to capitalize on the fast-growing gaming industry, Pokhara management opted to partner with Apice Inc to bring a PAGCOR-operated gaming facility to the

hotel, according to Anna Michelle Ordoña, Officer in Charge of VIP Services and Marketing.

Walk into Casino Filipino Capital and you are greeted by a surprisingly spacious foyer area, with the main casino area – dominated as it is by slot machines and noticeably luxurious chairs – located to the right near a small café. A large junket room is located to the left while behind the escalators that travel up to the hotel proper are a handful of gaming tables alongside more VIP rooms at the rear.

In total there are six tables of which five are baccarat and one blackjack, plus 150 EGMs supplied by RGB and comprising top-performing games like Light & Wonder's Jin Ji Bao Xi and Du Fuo Du Cai. Further expansion plans are also in the works, with

Ordoña confirming, “We envision a facility with more tables, EGMs and a larger gaming area, while still maintaining the homey-feel.”

It is that homey feel the owners of Casino Filipino Capital are aiming for – thus the choice of chairs – in order to provide a different ambience to the dazzling gaming floors of nearby integrated resorts.

“Our primary target is a bit different since here in Capital Casino we target unique players both foreign and locals alike: players who look forward to having a rewarding game in a homey ambience, players who want to have a different approach when





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it comes to gaming experience,” Ordoña continues. “We aim to position ourself as the only boutique casino in Clark.

“As a boutique gaming facility that offers a cozy atmosphere to our players, our gaming furniture offers comfort and convenience as though you are lounging at home. More importantly, being a boutique gaming facility also gives us the opportunity to offer more personalized service to our valued patrons.”

According to Ordoña, Casino Filipino Capital targets both the mass and VIP markets, although VIP accounts for around 80% of revenues. And while its patronage differs from many of its Clark neighbors, the property is aiming high on the back of Clark Freeport Zone’s impressive growth trajectory.

“The future of Clark is crystal clear,” she says. “It will prosper and it will continue to grow over the years. Efforts are being made, and are proving to be successful, to be at par with entertainment cities in the National Capital Region and even those in our neighboring Asian countries.

“Clark is a convenient gateway, has convention centers, top-tier restaurants, wellness spas, golf facilities, duty free shops and educational facilities.

“And at Capital Casino, our location is easily accessible while our team of experienced members never ceases to plan and implement the best gaming practices. Most importantly, our facility is managed and operated by PAGCOR, which stands by its slogan ‘Asia’s Friendliest’.” **RGB**



Grand ambitions

The owner of Royce Hotel and Casino has something special to offer his customers with nearby Pradera Verde Golf Club offering a luxury golfing experience in the heart of Pampanga.







Pradera Verde General Manager, Mike Singgaran

Located around 45 minutes by car from the center of Clark, Pradera Verde Golf Club is a passion project of Eight Integrated Development Corporation President, Rodolfo Pineda.

First envisioned in 2013, it neighbors the farming town of Lubao – Mr Pineda’s hometown – and incorporates a grander long-term vision that includes villas and residential towers, a substantial theme park and an air strip of substantially larger size than the small runway that exists on the expansive 495-hectares of land today.

But it is the golf course that currently takes pride of place, with 27 world class holes (soon to be 36) attracting both local and international players from far and wide.

“Mr Pineda, the owner, he had this vision,” explains Pradera Verde General Manager, Mike Singgaran, who also designed the course.

“This is his property and this is his home town – he is from Lubao. He wanted to build something for this town, and he asked me, ‘Can we build the golf course here?’ He showed me the model, and I thought, ‘Why not?’ It’s good for Lubao because it is something different from anywhere in Pampanga or in the Philippines.”

The first 18 holes of Pradera Verde Golf Club opened on 21 December 2016, coincidentally Mr Pineda’s birthday, with construction currently continuing on a final nine that will take the course’s full complement to 36 holes. Adding to the experience is a luxurious clubhouse, offering high-end dining in a vast and comfortable bistro, well-appointed locker rooms, a pro shop and private function rooms among other facilities.

But arriving at this point hasn’t been easy.

“The land was totally flat with nothing here – no natural creek or anything – so we had to create

everything from scratch,” says Singgaran. “We brought in about 1.5 million cubic meters of soil to build up the course.

“It was really a challenge for me to build this structure because normally as a designer you work with nature but there was nothing to work with. I’m lucky though that the owner trusted me and provided everything I wanted straight away. All the players enjoy it and the results are good.”

For Pineda however, the long-term value of Pradera Verde Golf Club may well be its appeal to customers of another one of his businesses: the recently expanded Royce Hotel & Casino in the Clark Freeport Zone.

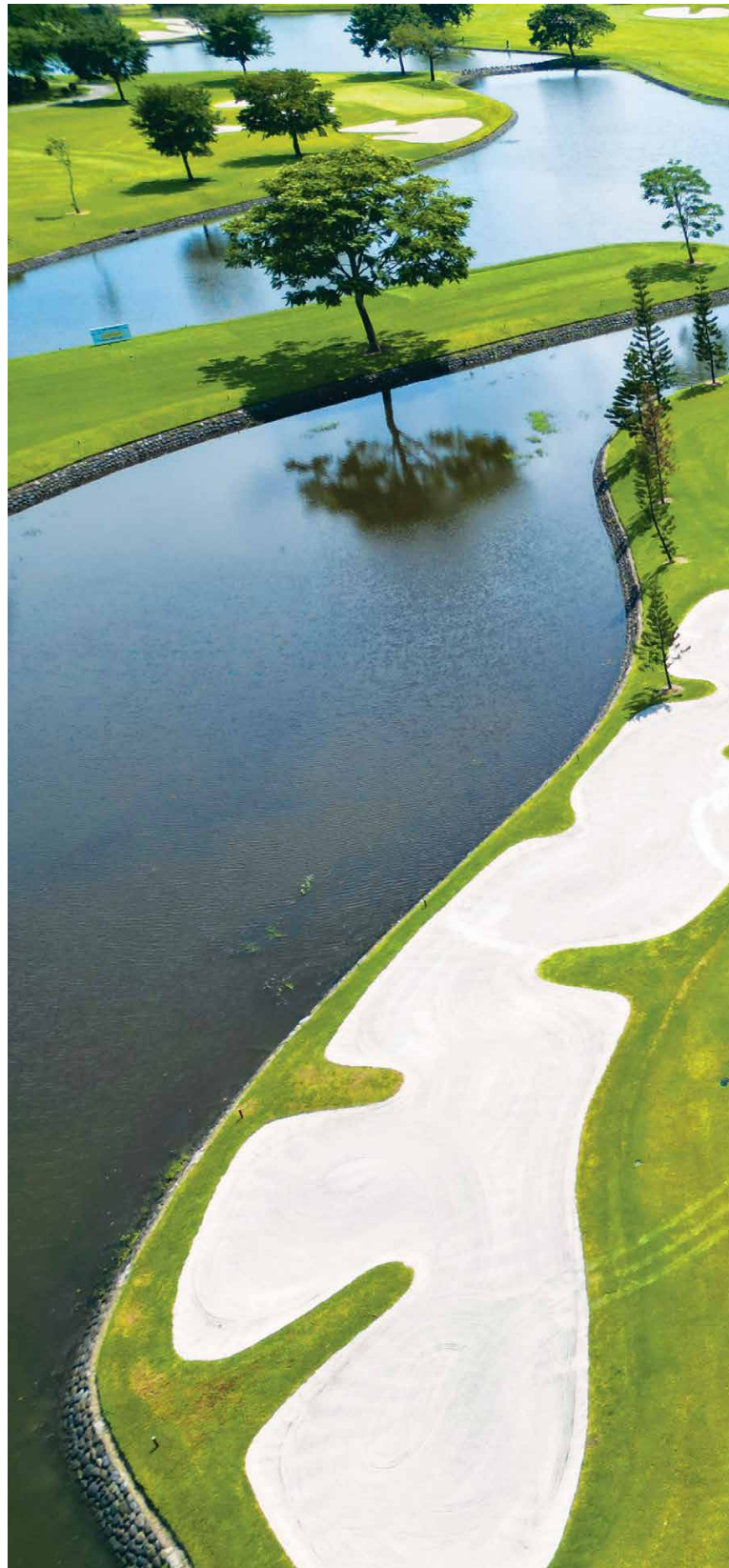
Although still a public course, it is understood the team are currently working on an array of packages for customers to stay at Royce and play at Pradera, providing the alluring combination of golf and gaming that so many international arrivals tend to enjoy.

The proposed runway expansion also has high-rollers in mind, given the hope it can be extended enough to allow private jets to land. A cluster of villas are planned alongside the golf club while two 12-story towers will provide 360-degree views of the property’s many fairways and greens.

“Mr Pineda had a very clear idea about what he wanted to develop here and because he is a golfer himself, he knew what the players would want as well,” Singgaran says.

“Our number one clients are Korean and of course everybody knows that Koreans love to gamble. They stay at Royce, play golf in the morning and in the afternoon stay in the casino, that’s what they enjoy.

“According to our members, we are one of the best golf courses around right now, so we have already built a name and the players want to come here and play because it’s a nice place. I think that will provide us with great opportunities in the future.” **RGB**





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