



WEEK 29

FRIDAY 20 JUL 2018

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THIS WEEK

- **GVC Holdings continues “strong momentum”**
- **DraftKings reaches landmark NY agreement**
- **A period of change at Caesars Entertainment**
- **Thousands of arrests in Thailand and China**
- **OIGA Event Preview**

GUEST COLUMNISTS:

Zac Cohen & Peter Causley

NJ SPORTS BETTING MARKET MAKES POSITIVE START



New Jersey sportsbooks took \$16.4m in the first two weeks of sports wagering in the state. The Garden State began offering sports betting after the repeal of the Professional and Amateur Sports Protection Act (PASPA) in May. The state’s Division of Gaming Enforcement (DGE) recorded less than \$3.5m in sportsbook revenue, which includes future bets that have yet to have been paid out, and winning bets that were not redeemed before 30 June.

Out of the total handle, at least \$1m of the wagers were future bets, and these are currently being counted as a win for the bookies, but can change in the future if they have to pay out.

“While it’s still early, we’re obviously off to a great start,” William Hill US CEO, Joe Asher, said. “We always knew there was a big appetite for legal sports betting during the years of litigation, and now it is being proven.”

William Hill currently has sportsbooks set up at Monmouth Park and the Ocean Resort Casino. Monmouth Park Racetrack took the largest share of wagers and revenue from the three sportsbooks available to bettors in June, as the racetrack took \$2.3m revenue. This is more than double revenue made by its competitors Borgata and Ocean Resort. ▶

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THIS WEEK IN NUMBERS

34,000



The number of visitors Melco International has received at its Cyprus Casinos within the first three weeks of its opening

£1.3m

The amount a player won on a gladiator slot game at Slots Heaven from a £10 spin



9



The number of casinos in Pennsylvania that have applied to the state's Gambling Control Board to operate online slots, table games and poker

\$750m



The amount a gangster based out of Macau, Wan Kuok-koi "Broken Tooth," raised within five minutes of announcing his Initial Coin Offering to help launch chess and poker tournaments with a Beijing-based firm

Dennis Drazin, President and CEO of Darby Development LLC, which operates Monmouth Park spoke to *Asbury Park Press*: "We are extremely pleased with our numbers. We think they show there is a huge appetite for sports betting. To be generating these numbers early, and it's not even football season yet, speaks enormously of the potential for when football season comes around. So we're thrilled by the early numbers."

There is an 8.5% tax on the handle for land-based sports betting, meaning New Jersey earned a little under \$400,000 across the two-week period.

Meanwhile, Delaware generated just over \$7m in its first 20 days of legal sports betting.

Meadowlands Racetrack became the fourth legal venue in the state to operate sports betting, and the first sportsbooks to be run by FanDuel since it merged with Paddy Power Betfair's US businesses.

According to *NJTV*, bettors at Meadowlands wagered more than \$1m during opening weekend and reports suggests it is expected to make around \$100,000. New Jersey's sports betting market is expected to become more competitive in the coming months, with more operators keen to offer sports betting before the start of the NFL season in September.

The deadline for licence applications on sports betting closed on Monday, with the DGE receiving five more applications that day.

According to the *Associated Press*, Golden Nugget applied for land-based and mobile sports betting, Hard Rock Hotel & Casino is awaiting approval of its application, and the three casinos owned by Caesars Entertainment have applied for land-based betting, mobile betting or both. Land-based betting would be held at Harrah's Las Vegas Hotel & Casino and Bally's Las Vegas Hotel & Casino, and the company would offer mobile sports betting aligned with all three of its Atlantic City casinos.

GVC HOLDINGS CONTINUES "STRONG MOMENTUM"

Gaming group, GVC Holdings grew its online business by 18% year-on-year in the first half of 2018.

Additionally, net gaming revenue increased by 8% during that same period.

GVC's second quarter results saw an 11% increase to net gaming revenue and a 22% growth to its online counterpart.

Accelerated growth in Q2 compared to Q1 was attributed to "good underlying momentum and the World Cup", supported by "a pipeline of new products and from high profile marketing campaigns".

GVC CEO, Kenny Alexander said: "I am pleased to report this positive trading update while at the same time undertaking the integration of the Ladbrokes Coral business.

"The strong momentum across the online business has continued and means we are well placed to deliver against our full-year expectations."

GVC's UK retail division saw a 3% decline during H1. The World Cup again helped to boost these results as Q2 actually saw a 2% increase to the division.

GVC's European retail division managed to grow at a rate of 29% year-

on-year during H1, with Q2 seeing a slightly less impressive 19% increase.

The company is one of the first major operators to reveal the positive impact the FIFA World Cup has had on its revenues, giving an insight into the overall effect which the event has had on the gambling industry.

Speaking to the *Racing Post*, Analyst David Brohan and Goodboy described the news as "another strong update" from GVC.

Despite the H1 report showing growing revenues, investor confidence in the company could be measured as declining after the results were released, as the company's shares fell in value.

The value of the shares fell in value by 2.5% to £10.78 (\$14.03) following the release of the results.

One reason for this could be the fact that the World Cup didn't have the positive impact that many investors were predicting.

Alternatively investors could be of the mindset that the positive impact of the World Cup has passed and as a result they are cashing before the company's revenues return to normal.



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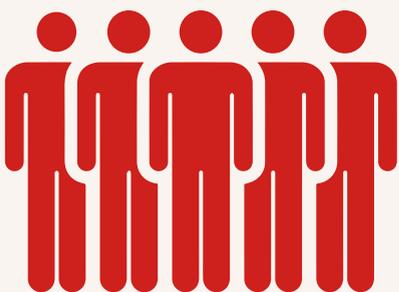
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\$2.1m

The amount raised for One Drop Charity through the World Series of Poker player buy ins



233



The number of people who have filed requests to be banned from casinos in Macau during the first six months of 2018

DRAFTKINGS REACHES LANDMARK NEW YORK AGREEMENT

Daily fantasy sports operator DraftKings solidified itself as a market leader in US sports wagering through a "landmark" licensing agreement with the del Lago Resort & Casino in New York. The agreement sees the establishment of a physical DraftKings sportsbook inside the del Lago Resort.

Should legislation change in New York to permit sports wagers, DraftKings and del Lago will also partner up to enter the potentially lucrative online and mobile sports wagering market in the state.

Jason Robins, CEO and Co-Founder of DraftKings, said: "New York is one of the largest revenue opportunities for future sports wagering operators and we are thrilled to partner with del Lago Resort & Casino to offer sports fans a unique and novel sports betting experience, both at a physical sportsbook and on mobile when permitted." New York is yet to legalise sports wagers, but the potential market is said to be the second largest in the US behind California, according to a recent American Gaming Association study.

The new licensing agreement means DraftKings will have a foothold in both New York and New Jersey's sports wagering markets, as the company entered into a similar agreement with the Resorts Casino Hotel in Atlantic City.

DraftKings' main competitor in the daily fantasy sports (DFS) market, FanDuel, appears to once again be the company's biggest rival, as it too has begun to move into the sports wager vertical.

FanDuel recently completed the merger with UK gambling operator Paddy Power Betfair's US businesses to create the "largest online sports destination in the United States". Doors opened to FanDuel's first ever sportsbook at the Meadowlands Racetrack in New Jersey on 14 July. Over \$1m is said to have been wagered on the opening weekend at Meadowlands, according to *NJTV*.

It appears that the two US-based DFS operators are attempting to leverage their popularity and diversify their business in the country in order to establish themselves as key players in the newly opened sports betting markets.

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THE WEEK IN QUOTES

"This isn't going to be a smooth ride. There will be bumps along the road. We will be criticised and some of that criticism will be fair. But we believe that it's only by setting out with a bold ambition that we'll start to see that change we want – and to have a positive impact on people's lives."

Lyndsay Wright, Director of Strategy, Brand and IR on William Hill's new initiative "Nobody Harmed by Gambling"

"Why should someone come and tell me I can't ban betting advertising? Because there's a club that spent €400m on Cristiano Ronaldo? With all due respect, I couldn't care less. I abolish the advertisement of betting companies because gambling is destroying families."

Luigi Di Maio, Deputy Italian Prime Minister who wants to ban all gambling advertising in Italy

"MGM has done something that in over 30 years of practice is the most outrageous thing I have ever seen. They have sued the families of victims while they're still grieving over their loved ones."

Lawyer Robert Eglet on MGM's decision to sue the families of victims at the Mandalay Bay shooting in Vegas last year

THAILAND AND CHINA TARGET ILLEGAL GAMBLING OPERATIONS

Bangkok police arrested 4700 people and seized bank accounts holding over 35m baht (\$1.05m) in relation to illegal sports betting offences during the FIFA World Cup.

In addition to the arrests and the seized accounts, Police Major General Phanurat Lakboon, Deputy Chief of the Metropolitan Police Bureau said almost \$6000 in cash was confiscated.

Betting slips showing cash flow of almost \$42,000 were confiscated, and 147 bank accounts were frozen with deposits of \$1.05m for further examination by the Anti-Money Laundering Office.

Most forms of wagering are illegal in Thailand, as the state only permits gambling via the state sponsored Thai Lottery and horse racing, but the wagers have to be placed on Thai land.

The arrests came after a month of continuous raids to suppress illegal betting during the global sporting event.

Police Major General Lakboon has reiterated the MPB will continue its fight against football betting in the city.

As always, the World Cup proved to

be a goldmine for sportsbook operators on a global scale.

Nonetheless, when it comes to betting on the biggest sporting event in the world, you'll always get those who are seeking to take the underground route.

Meanwhile, in China, Guangdong province police broke up an illegal World Cup betting ring last week, involving more than \$1.5bn of cryptocurrency bets. The gambling platform was run on the dark web, a service which is not indexed on traditional search engines, making it much harder for law enforcement to track down. Six suspects were arrested, and a total of \$743,800 in bank accounts has been frozen, with over \$1.5m in cryptocurrencies seized.

During its eight-month run, the site attracted 330,000 registered users from multiple countries, and was said to have 8000 agents in place to draw in new users, in a pyramid-style scheme.

The gambling syndicate "used the loophole that virtual currency is not effectively regulated in our country" to make huge profits, police said.

THE WEEK'S WINNERS AND LOSERS

WINNERS

Clarion Gaming - The company announced the launch of ICE North America in 2019 which will bring together ICE Sport Betting USA and GiGse, hosting an event for the interactive gaming industry

Yuba County in Sacramento - A Hard Rock Casino Hotel has been approved to be built in Yuba County which is expected to create more jobs in the area

Lagos State Government - Lagos State Government appeals against the Federal High Court on Judgement of lottery operation

Donald Trump - Paddy Power increased the odds of Trump being impeached from 8-1 to 2-1 after his meeting with Putin in Helsinki, and refusing to denounce the Russian President over election meddling claims

LOSERS

FULL STEAM AHEAD AT CAESARS ENTERTAINMENT

Operator Caesars Entertainment has acquired property holding company, Centaur Holdings, for \$1.7bn.

The transaction includes Hoosier Park Racing and Casino in Anderson, Indiana, and Indiana Grand Racing and Casino in Shelbyville, adding to the Caesars Entertainment portfolio. Caesars plans to install table games at both casinos, pending approval from authorities.

"The Centaur acquisition expands our footprint to the attractive central Indiana region with exciting new destinations that are profitable, well-capitalised and highly complementary to our existing portfolio," said Mark Frissora, President and CEO of Caesars Entertainment. "This project is an important part of our growth strategy, which expands our brands, increases revenue and facilitates."

Moreover, the operator unveiled its new conference centre, otherwise known as Caesars Forum.

Costing \$375m, the space comprises 60,386 square metres and will be completed in 2020. The venue hosted a ground-breaking ceremony this week, with Frissora adding: "Caesars

Entertainment is an undisputed leader in the meetings industry having hosted more than 1.9 million meeting participants, 1.6 million room nights and 17,300 meetings and events last year alone.

"Caesars Forum will be a gateway to Caesars Entertainment's unmatched network of exclusive offerings that guests and organisations have come to expect. Caesars Forum builds on our strategy to invest in infrastructure that enhances long-term value for our guests."

Last week, the company finalised the sale of the Octavius Tower to real-estate investment trust VICI Properties for \$507.5m.

"These agreements with VICI unlock more than \$500m in value from our real-estate assets to support value-adding growth opportunities and reduce the volatility of our future rent payments, demonstrating our commitment to create value for our shareholders while maintaining financial discipline," stated Frissora.

The company won't be short of any change when completing the grand conference centre in months to come.



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NEW JERSEY RISES

New Jersey gaming same-store revenues rose 2.42% in June. However, the big highlights were the totals for sports betting and the two new Atlantic City casinos.

Sports betting, which launched halfway through the month, was led by Monmouth Park generating \$2.2m in revenue in just over two weeks of operation.

At that pace, the William Hill-operated sports book at Monmouth would generate \$26.8m in its first year.

Hard Rock and Ocean Resort, which opened on the 28 June, generated average daily revenues of \$1.04m and \$725,000.

This compares to the average daily revenues of \$545,988 at its closest neighbor Resorts and \$822,606 at Caesars.

In fact, Hard Rock had higher average daily revenues of any casino in AC except for Borgata in the time it was open.

Same-store land-based revenues factoring out Ocean and Hard Rock rose 1.43% on the back of strong growth from Golden Nugget.

However, three out of the four boardwalk properties posted revenue declines in the month, while two out of the three marina properties grew revenues.

Online gaming grew once again and saw online poker's first month of growth since February last year.

TABLE DROP

PROPERTY	REVENUE (\$)	CHANGE (%)	TABLE HOLD	
			2017	2018
Golden Nugget	20.539	+13.99	18.3	17.6
Tropicana (TPCA)	30.668	+7.76	13.6	13.1
Borgata (MGM)	60.835	+1.67	17.9	16.9
Caesars (CZR)	24.678	-0.04	15.8	16.1
Resorts	16.380	-1.82	11.6	14.9
Bally's AC (CZR)	17.514	-3.54	18.6	18.5
Harrah's (CZR)	29.703	-6.14	20.6	24.2
Hard Rock	4.172	N/A	0.4	0.0
Ocean	3.008	N/A	9.7	0.0
AC Land-based Total	207.496	+5.07%		
Land-based Same Store	200.317	+1.43		

STOCK UPDATE

US-listed gaming stocks to hit a 52-week high this week:

AGS	\$29.01
Monarch Casino	\$48.61

GAMEART

60+

Video slot games

Multi-level

Jackpot games

65+

Currencies

9

Languages

English, Italian, Simplified Chinese, Croatian, Romanian, Spanish, Thai, Portuguese, German

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OKLAHOMA INDIAN GAMING ASSOCIATION CONFERENCE AND TRADE SHOW PREVIEW

23-25 July

Cox Convention Center, Oklahoma City



The 2018 OIGA Conference and Trade Show, also known as ‘the biggest little show in Indian gaming’, is fast approaching. An estimated 3,000 people will be attending the conference, which sees guest speakers, vendors and visitors all coming together to celebrate the achievements of Indian gaming. OIGA will also offer the Certification for Responsible Gambling Training: Casino Employee Orientation at the event, a “must have” for any casino employee.

The trade show will kick off this year with the return of the annual golf tournament, which benefits the John Markey Scholarship Foundation non-profit, on Monday, 23 July before the conference and trade show open. Not only will it make for a relaxing start to the event, but it will be a fantastic opportunity to network and forge new connections with people in the industry. It is also a great chance to catch up with old friends and strengthen those ties.

Golf tournament registration begins at 8am at the Lincoln Park Golf Course, with the tournament beginning at 10am. Conference registration will take place between 12pm and 4pm in the convention centre lobby. Once

registered, delegates can head on over to ballroom C and check out the film festival hosted by OIGA. Don't forget about the OIGA annual poker tournament, which runs from 7pm to 9pm at Fassler Hall. There is also the OIGA Kickoff Party, which starts at 8pm. Shuttles will be provided from OIGA host hotels from 6:30pm to midnight, so there's no reason to miss the poker tournament or the party, which are both great opportunities to network and catch up with friends in the industry.

On Tuesday, an hour-long welcome session will begin at 8:30am in Ballroom C, followed by the Certification for Responsible Gambling Training from 9am -12:30pm. The Certification for Responsible Gambling Training: Casino Employee Orientation will inform casino employees about Problem Gambling and customer services, where participants will learn about the intricacies of gambling disorder, problem gambling as a component of customer service, how to help customers with self exclusion, and referring them to other forms of help. Successful completion of this will certify delegates as a Certified

Problem Gambling Trainer for Casino Employees, something that will benefit every casino employee.

The OIGA Awards luncheon starts afterward in Ballroom C, and all are invited to celebrate the success of peers and co-workers. The luncheon will run from 12:30pm to 1:30pm and will be followed by the opening of the trade show and ribbon cutting. On Wednesday, 25 July delegates are invited to a second day of certification training from 9am -12:30pm. At noon, the trade show floor will open. There will be a variety of different vendors and businesses at the trade show, from gaming machines to food service suppliers and limo services. There is sure to be something for everyone here. Not only is it a chance to engage with different businesses and get yourself up to speed on what is available, but it is also a networking opportunity. The trade show will finish at 3pm leaving delegates with a free afternoon to unwind before heading back to work.

The convention center is situated in the middle of Oklahoma City, so there is plenty to do. For those not ready to head back just yet, the Myriad botanical gardens are only a five-minute walk from the convention center and many restaurants are located in the area. There are four host hotels for attendees to stay at: the Renaissance Hotel Oklahoma City Convention Center, Hotel & Spa, the Courtyard Oklahoma City, the Skirvin Oklahoma City and the Sheraton Downtown Oklahoma City. All hotels are within walking distance of the convention center so make sure to book reservations ASAP. The Cox Convention Center is directly across the road from the Santa-Fe train station, providing attendees with plenty of transport links to the rest of the city. If you have never been to any of OIGA's previous conference and trade show events, then what are you waiting for?

WELCOME

As Chairman of the Oklahoma Indian Gaming Association, and on the behalf of our membership, I extend you a hearty welcome back to Oklahoma City and to our 23rd Annual Conference and Trade Show, 23-25 July. The convention hall is packed with the latest technology and the best vendors in the industry. We aren't called "The Biggest Little Show" for nothing!

Our attendees come from all over the globe, and for many, the OIGA Annual Conference and Trade Show is their first visit to Oklahoma, or even the United States. It is our honour to introduce them to our little corner of the world, and we delight in watching them experience the "Oklahoma standard" first-hand. Oklahoma is one of the friendliest places in the United States, and our Conference and Trade Show is easily the friendliest place in Oklahoma.

The Cox Center, where all of the sessions and the trade show take place, is in the heart downtown Oklahoma City. It is just blocks from a place that, on one otherwise-ordinary April morning, suffered one of the worst acts of terrorism ever to take place on American soil: the Oklahoma City Bombing. It is a powerful museum and National Memorial now, and well worth strolling a few blocks north to see. That transformative, terrible moment revealed to the world the strength, dignity, and kindness of Oklahomans. You'll experience that kindness first-hand when you come to our Conference and Trade Show.

You'll also see a city that is ever-evolving. Oklahoma City has a booming food scene, the Bricktown entertainment district complete with our own River Walk, a world-class rowing and kayaking district just south of Bricktown, and the Oklahoma City Museum of Art, which boasts the largest collection of glass sculptures by the venerable Dale Chihuly.

Our Conference and Trade Show is filled with thousands of potential business partners, vendors, and session leaders, and while we plan to have a great time and enjoy connecting with new and old colleagues and friends, we are also committed to continuing our important work.

When you aren't in sessions or on the Trade Show floor, please explore Oklahoma City's vibrant downtown. Immediately to our east is the beautiful Myriad Botanical Gardens, perfect for an early-morning stroll. A few blocks north will find you at the Oklahoma City National Memorial, which if you have not seen it, is extraordinary. Monday morning will begin with a cause dear to us. The John Marley Golf Tournament starts bright and early, at 8am, at Oklahoma City's Lincoln Park Golf Course.



That evening, we'll all enjoy a welcome party and poker tournament at Fassler Hall, a popular Midtown spot with excellent views of the downtown skyline. We'll open the conference Tuesday morning, with something new. OIGA is introducing two new certificate programmes. The Certification for Responsible Gambling Training: Casino Employee Orientation is offered via a partnership between OIGA and the Oklahoma Association on Problem & Compulsive Gambling (OAPCG).

At the annual Awards Luncheon, we will honour some outstanding Tribal Gaming professionals, and introduce you to this year's John Marley Scholarship recipients. From there, it's on to more sessions and lots of great networking on the trade show floor, which opens at 1:30 pm on Tuesday.

I've been a part of OIGA for many years, and it is my great honour to serve as its Chairman this year.

Welcome to our little corner of the world.

With thanks and wishing you a prosperous stay,

David J. Qualls

Q&A WITH EVENT DIRECTOR

Sheila Morago, Executive Director, Oklahoma Indian Gaming Association



Have you seen interest in the conference and trade show increase this year?

This year's Conference and Trade Show are filling up fast, which has become the norm for our show. In the last few years, we have witnessed an increase in participation from global firms, both on the trade show floor, and conference attendees. Our industry is thriving, and we are devoted to helping reshape the industry.

How are the year's conference and trade show different from ones in the past?

We are offering two certificate programmes at the conference this year. One will be on Tuesday, 24 July and the other on Wednesday, 25 July.

The first certificate programme, *Balancing the Demands of Government and Business: Tribal Economic Development and Nation Building*, is a collaborative offering from the Sycuan Institute on Tribal Gaming (SITG), housed at the L. Robert Payne School of Hospitality and Tourism Management (HTM) at San Diego State University, and the Oklahoma Indian Gaming Association (OIGA), which come together to create an Executive Training Program. Both the SITG and OIGA are committed to the goal of developing a curriculum that provides a global vision for tribal gaming education and development. In particular, the Executive Training Program emphasises cultural sensitivity and competence, government-industry relations, and casino industry

intelligence from the perspective of tribal nation (re)building.

The second certificate programme, the Oklahoma Indian Gaming Association in partnership with the Oklahoma Association on Problem & Compulsive Gambling (OAPCG), will offer "The Certification for Responsible Gambling Training: Casino Employee Orientation". Participants will learn to train casino employees about problem gambling: the characteristics and dynamics of the Gambling Disorder; problem gambling as a component of customer service; use of the OAPCG Problem Gambling training film and helping customers via tactics such as self-exclusion, Problem Gambling Referrals, and the Problem Gambling Helpline. Participants who complete the three-hour training will receive a certificate called "Certified Problem Gambling Trainer for Casino Employees," which must be updated every two years.

What are the major topics that attendees can expect to be covered at OIGA this year?

As always, the OIGA Conference will aim to address as many facets of the gaming industry, both now and in the future. This year's session topics include: Let's Start with Sports Betting 101; Ball and Dice – What you Need to Know; Alcohol Compliance – What is Coming Down the Road... SOON; History of Gaming in Oklahoma; In the Era of #MeToo Movement; Situational Awareness and many more. See the full schedule at OIGA.org.

How can attendees get involved in the pre-conference golf tournament and poker tournament?

Two of our most popular social events are the John Marley Golf Tournament, and the Poker Tournament. This year, we have also added a Ladies' Blackjack Tournament.

All of these events take place on Monday before the conference and trade show opens, which will be held on 23 July. Registration for the John Marley Golf Tournament is simple and can be done online at OIGA.org, but spaces are limited and are almost always sold out. The fee for a team of four is \$1,500, and individuals are

\$375. The shotgun start is at 10am, and we are playing at the Lincoln Park Golf Course. All proceeds go towards the John Marley Scholarship Foundation, which awards higher education funds to students whose parents or guardians are employees of Tribal Gaming facilities in Oklahoma.

The Poker Tournament will operate at the same time (7-9pm) as the new Ladies' Blackjack Tournament on 23 July. The event will be held at Fassler Hall, a German-inspired beer hall in downtown Tulsa, Oklahoma City. Our Welcome Party will also be held at Fassler Hall on 23 July at 8pm. If you'd like to sign up, it's easy – just come to Fassler Hall when the tournament begins and we will sign you up for free!

Besides from the poker and golf tournament, what are some of the main networking opportunities at the event?

One of the greatest networking opportunities is simply walking through the trade show floor. You will meet the who's who of Tribal Gaming in Oklahoma City this month. When it comes to our event, we always make sure that we allow our attendees to spend time talking to highly regarded business professionals. To get the most from the trade show, I'd like to recommend attending the Awards Luncheon on Tuesday, and the Trade Show Floor, also on Tuesday from 5-6pm. The Walk-Around Lunch on Wednesday is also worth attending.

What are the benefits of hosting the event at the Cox Convention Center?

Downtown Oklahoma City is a great location for us. There are many excellent hotels and restaurants to visit. Traversing a treacherous environment like the show floor can be exhausting, but getting around is easy and it's convenient for companies you'll see on the trade show floor because of its proximity to major interstate highways. We've been at the Cox Center many times, so everyone is familiar with the location, and they make it convenient for us to put on a great show! If you can't make it this year join us next year when we will be in Tulsa, Ok at the Cox Business Convention Center on 22-24 July, 2018.

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PRE-SHOW Q&A

RUSS WITT

Director of Central Determination Gaming, Ainsworth

What are you expecting to gain from your attendance at OIGA this year?

The show focuses on the Class II product much more than many other trade shows across the country. Oklahoma is the largest Class II market in the country, so it gives everyone in gaming a chance to see the latest and greatest products.

OIGA also gives operators, manufacturers and regulators the chance to attend Class II specific training that can be difficult to find at many other shows. These events have been extremely influential in Class II gaming and Tribal Gaming as a whole over the years. Personally, I will be part of the Class II Innovation Panel and look forward to learning and teaching throughout the show.

What networking opportunities are you looking forward to?

Ainsworth proudly sponsored the welcome reception and participates in the annual golf tournament. OIGA also has a family reunion feel to it. One of the best parts is certainly catching up with old friends and making new friends.

What do you think will be some of the most highly discussed topics at OIGA this year?

Sports betting will certainly be on everyone's mind. The recent Federal Legislation allowing states to opt into the wagering on sporting events could have a major impact on Tribes everywhere, including Oklahoma. In 2020, there will also be some upcoming compact renegotiations that will undoubtedly be a major moment in Tribal Gaming. And – as always – gaming approval or expansion in Texas will be on a lot of people's minds.

In your opinion what is the unique appeal of OIGA for you?

Oklahoma is certainly one of the most important Tribal Gaming markets in existence. And for Ainsworth – particularly in the Class II market – it has been a leading market dating back to prior to our acquisition of Nova Technologies in 2016. We are always excited to interact with our customer partners in Oklahoma.



PRE-SHOW Q&A

JEAN VENNEMAN
Chief Commercial Officer, Gaming Arts

many suppliers seeking their time and attention. Because OIGA is dedicated to Oklahoma's Indian Nations, we can really spend time talking with customers and having substantive discussions on how we can partner with Oklahoma's tribal operators to drive revenue and operating efficiencies.

booth and look forward to doing hands-on demonstrations of our video bingo slot portfolio, as well as our industry-leading bingo and keno games and technology, along with some productive discussions.

In your opinion, what is the unique appeal of OIGA for you?

OIGA is a smaller, more intimate show than G2E and even NIGA. For Gaming Arts, OIGA affords us a real opportunity to spend time talking with our customers, developing stronger partnerships, and really showcasing our end-to-end product suite.

At the other shows, our customers are pulled in so many directions, with

What are you expecting to gain from your attendance at OIGA this year?

We are excited to be back at OIGA, where for the first time we will have our own booth. We expect the show to give us further insights into our customers and opportunities to spend time demonstrating how Gaming Arts can positively impact their operations and their bottom line. We will have our whole product portfolio in our

What do you think will be some of the most highly discussed topics at OIGA this year?

We expect sports betting to be a big topic of discussion. Purchasing new technology, games, and products to update gaming floors will also be on the minds of Oklahoma operators for certain. I would also expect discussion about mobile technology and Fantasy Sports post-PASPA. OIGA's operators are very savvy and successful; we are looking forward to hearing their thoughts on these topics as well as many others.

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PRE-SHOW Q&A

JOHN BUNCH
President, Pervasive Gaming

really allows a company to get to know the Oklahoma Tribal Gaming Market on a more intimate level.

OIGA is very important not only to the Oklahoma market, but many other Tribal Gaming markets as well. In my opinion, if a company wants to begin a clear focus on Tribal Gaming they must start to advertise at OIGA and NIGA. By far they are the two most important events of the year.

What are you expecting to gain from your attendance at OIGA this year?

I expect to not only gain a vast amount of marketing for both old and new products from this year's conference, but a better perspective on the current state of our industry as a whole.

As a person who has been in the Tribal Gaming industry for a good number of years it is also somewhat of a family reunion. Friends, colleagues and industry legends are all there with the communal spirit to better Tribal Gaming, no matter what aspect of the industry they are in.

What networking opportunities are you looking forward to?

I look forward to expanding our partner circle with existing and potential customers. As most well know the networking advantages of OIGA are off the charts. Of course everyone enjoys the gatherings during OIGA, these enable one to take some time to laugh and converse as well as get down to a more personal level with everyone attending.



In your opinion what is the unique appeal of OIGA for you?

OIGA provides companies big and small with the opportunity to market their products on a more even playing field as opposed to larger conferences like G2E. OIGA

PRE-SHOW Q&A

Paul Gordon
Senior Vice President of SalesRymax Marketing Services, Inc.

When essentially the entire industry in one form or the other converges on OIGA each year, it is a reflection of its importance to the industry.

Being a marketing partner for player loyalty programmes with Cherokee, Choctaw, Downstream and others is vitally important to our other markets since the commitment to player loyalty and the innovative programmes that result from this can translate in other non-competing states.

What networking opportunities are you looking forward to?

The round of golf [despite its humbling effect on my ego] is a pleasurable networking opportunity at the start and finish of the round. This start to OIGA is very well run and puts you in a great environment on the course. The evenings are also a great opportunity since there are

very good restaurants and bars where the industry can gather.

What are you expecting to gain from your attendance at OIGA this year?

Forging new relationships and fostering existing ones are always top objectives at any trade show or industry gathering.

Despite the explosion in growth of the casino business, this is still somewhat of a small industry. We know each other as suppliers and clients and it is a healthy industry where non-competing services can help each other out to the mutual benefit of each business and the client.

If you listen more than you speak, you can gain insight into new trends and activities that create new opportunities. And if you come prepared and do your homework about the needs of the market and consumer trends, you are in a position to get decisions made on the spot by being in front of the key decision makers.



In your opinion what is the unique appeal of OIGA for you?

The unique appeal of OIGA is that the Oklahoma market and the surrounding areas are very robust casino territories that give you insight into local marketing that also has a certain amount of destination marketing, too. This is driven by the uniqueness of the market because of the wide variety of tribal operators and the sophistication of their competitive marketing initiatives.

PRE-SHOW Q&A

PEGGY ROGERS

Regional VP of Sales - Central, VizExplorer



In your opinion what is the unique appeal of OIGA?

For VizExplorer, the OIGA event is a chance to touch base with existing tribal customers in the region and introduce ourselves to those we don't yet serve. Home to some of the largest Indian Nations in the country, Oklahoma is an epicentre of innovation and opportunity in gaming and beyond, which is very well suited to the kind of solutions we are developing for the industry.

What major topics and trends are you most excited about being covered at this year's event?

It's always gratifying to see the ways tribes have evolved and enhanced their casinos with new revenue generating amenities, turning them into full scale resorts in many cases. With our specialty in bringing together and making sense of disparate data sources, this kind of business growth signals economic diversification, which is very exciting to us.

What are you expecting to gain from your attendance at OIGA this year?

We launched tableViz with ChipVue late last year. It's an advanced new table game solution that we are debuting in this region for the first time, and we believe both table game operators and

casino marketers are going to be very excited about it. Not only does it enable accurate ratings for table game players for the first time, it also makes slot-like analytics available for table games to allow the type of floor optimisation that we've done with slot machines for years.

How are you looking to utilise the platform of OIGA to gain exposure for your company/products?

From the trade show floor to the conference to social events throughout the week, OIGA lets us rub shoulders and exchange ideas with casino executives from the region. From these conversations, we gain an understanding of the casino operators' biggest challenges, which feeds into the products and tools we in turn deliver for our customers.



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GUEST COLUMNIST



ZAC COHEN
GENERAL MANAGER, TRULIOO

Cohen outlines the current strategies online gaming operators can enforce to protect against the threat of money laundering

Gaming operators deal with numerous accounts and large sums of money, making them a prime target for money-laundering activities. The industry threat from money laundering is significant. Innovative attempts to funnel illicit funds are far more sophisticated than ever before and the industry needs to leverage the latest innovations to help stay one step ahead.

Earlier this year in the UK, the Gambling Commission warned five online casino companies they could lose their licenses, as they were deemed to not be doing enough to stop criminals from money laundering. They also fined one betting firm £6.2m for breaching anti-money laundering (AML) and social responsibility regulations.

Similarly, in Northern Cyprus, 13 casinos are being investigated for money laundering – over \$100m in funds have already been confiscated. To give an idea of the scope of the issue there, reports claim over \$5bn in overseas transfers are under investigation.

In response to the corrupt practices exposed by the Panama and Paradise Papers, regulators around the world continue to strengthen AML laws. The EU's Fourth Anti-Money Laundering Directive (4AMLD) now requires due diligence checks on gaming transactions of €2,000 or more. Numerous other countries, such as Macau, a city known as a gaming and gambling hotspot, have also added to their AML safeguards.

It's not just knowing the laws that count for operators, it's actively implementing effective AML procedures such as training, screening, monitoring and reporting. However, these AML procedures must also be scalable and cost effective while offering a smooth, quick and easy sign-up experience for new players.

While the industry has been growing overall, online gaming specifically outpaces all other channels. Globally, the online gaming market is projected to grow to nearly \$60bn by 2020, or a 57.7% increase from 2015. With all the growth that online gaming is experiencing, added with the fact remote access presents complex challenges not faced by in-person operators, improving online AML procedures is a significant requirement for improving overall compliance.

Action plans

The best way to prevent laundered money from entering the online gaming environment is at account creation. By rejecting questionable players from the entry

point, operators ease the burden on other AML procedures. Properly identifying prospective players – ensuring they are who they say they are – is a smart fraud mitigation strategy. However, the goalposts for identity verification are not the same for every country, operator or prospective player. As laws and levels of risk differ, the best player ID strategy is to customise the rules engine based on your risk tolerance and the regulations of each specific jurisdiction.

The initial identification requirements are to collect data points about the person, such as legal name, address and date of birth. This information is then matched against trusted data sources to confirm or call into question the provided data, and assessed against the organisation's risk-based approach.

Other situations may require enhanced due diligence. Perhaps the transaction amount or volume is high, the person is from a high-risk part of the world, some discrepancies are noticed in the identity information, or there are other red flags requiring more investigation.

What more can be done?

In those cases, additional identity verification data points can help.

One type of identity information that is quickly growing in use is the scanning of images of actual identity documents, referred to as document verification. In this process, the prospect takes images of the front and back of an identity document, such as a driver's licence or passport. They then electronically submit the images, along with a photograph of themselves.

The document images can be compared to official document templates to determine authenticity, as well as ensuring a document is not forged or altered. The "selfie" image is also analysed with facial recognition technology to ensure it matches the face on the identity documents.

Mobile ID, the latest identity technology, uses information from mobile network operators (MNOs) to provide an additional layer of trust for onboarding new prospects. Due to KYC requirements MNOs are required to meet, they already have extensive identity information of their users. Correlating that data with other data points provides another powerful layer of fraud protection, while also providing coverage for thin-file individuals or those lacking traditional identity documents.

To strengthen defences against money laundering and optimise compliance performance, gaming operators are well served to investigate the latest identity verification technologies. Access to comprehensive and reliable global data, ease of integration, and speed of AML checks are important factors when considering the best solution to stop money laundering attempts at the (digital) door. Effective AML procedures require careful analysis, while smart controls will limit the chances of loss.

GUEST COLUMNIST



PETER CAUSLEY
MANAGING DIRECTOR,
LIGHTNING BOX

The Supreme Court's repeal of PASPA presents a huge opportunity to grow not just sports betting, but also online casino in the US, Causley discusses

May's Professional and Amateur Sports Protection Act (PASPA) repeal was greeted as Christmas come early for those who have spent the past 25 years arguing Americans should have the right to a flutter on their favourite sports team.

What has been talked about less since is the fact that Santa may also have kept something in his sack for their counterparts in online casino, who could soon offer their fellow citizens something similar when it comes to cards, chips and slots.

Of course, not all of the objections to such a change in the legislation have come from anti-gambling campaigners.

Some of the old-time land-based casino owners see the growth of online as a grievous threat to their existing operations, or at the very least a boon to their competitors.

As a result, they have been very active in lobbying against any attempts to grow the betting market outside their own establishments. But in my view, any people that still see this in such adversarial terms could be missing a trick – and are likely to be outmanoeuvred.

They are also setting themselves against a tide of change in many parts of the union. By the time the state of New Jersey triumphed in its PASPA challenge, Delaware, Nevada and Pennsylvania had all decided that online gaming was for them, with Florida, California, Michigan, and New York among the most interested of many others also examining their options. This proves demand among would-be players is well and truly there.

Many of the land-based casinos objecting to online gaming are also lamenting the lack of product being provided to attract millennials. With the average age of the online player in Europe being much younger

than in land-based gaming, we could have a ready-made solution for the millennial player, if those objecting just had the vision to see this opportunity to bring in new players for their portfolios of games. Let the player decide what platform, in venue or online, they play on.

Needless to say, what works on the casino floor in Vegas is not always what does so online in established markets around the world.

A lack of knowledge and experience when it comes to internet gambling may well have been another inhibitor in the past. But as we are seeing in the emerging US sports betting world, with existing stakeholders partnering with European operators and suppliers to make a mutually beneficial play, help is at hand. I would argue there is much more to be learned from the European online casino industry than there is to be feared.

At Lightning Box, we have established ourselves in the US via a number of deals in the land-based and social casino industries.

Our games feature on the cabinets of a number of prominent manufacturers and have been well-received in recent years by players. We've also been very careful to offer them and other games like them in social casino, as well as to online casino players in New Jersey, who are currently carrying the torch for others, hoping they will be able to gamble on online casinos.

That experience, coupled with what we have learned as a partner of many of the leading British and Scandinavian facing online operators will hopefully leave us well-placed to help out US online casino pioneers.

The demands on suppliers and operators alike are sure to be challenging, with state-by-state licensing requirements alone set to tax even the biggest brands. Yet the rewards on offer, with populous states such as Florida and California looking to legalise online, are self-evident.

It will be up to the states themselves if they decide to follow many other countries around the world in trusting their people to wager in a well-regulated online market, with land-based concerns no doubt playing a part too. But the opportunity to capture the zeitgeist and take advantage of legislative change has never been stronger. With the right partners and providers, it could be fruitful for everyone.

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