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WEEK 31

FRIDAY 03 AUG 2018

WAVE OF US SPORTS BETTING UPDATES CONTINUES

*Operators and suppliers continue to agree
sports betting deals*



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WAVE OF US SPORTS BETTING UPDATES CONTINUES

Operators and suppliers continue to agree sports betting deals

THIS WEEK

- Macau casino growth reaches two-year mark
- DoubleDown sale harms IGT Q2 revenue
- Tougher gambling laws in Russia and Great Britain

GUEST COLUMNIST

- **BBIN**



Barely a day passes that does not include a significant development in US sports betting at the moment, be it a new partnership, another sports league having its say on the matter, or the opening of a new retail or online sportsbook.

This week's movements have been brought to us by MGM, GAN, Caesars Entertainment, the NBA, GVC, Boyd Gaming and Scientific Games.

MGM has had the busiest week, making three important announcements. The first outlined a new partnership with fellow casino operator Boyd to expand both firms' mobile and online gaming reach throughout the US. The partnership will see the pair's platforms being granted access to jurisdictions where either company operates a physical casino and online licenses are available.

Next, MGM announced a joint venture with industry giants GVC. The 50/50 venture will see both operators put up \$100m to create a new sports betting and online gaming platform, as well as establishing a headquarters in a "major US technology hub." ▶

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THIS WEEK IN NUMBERS

£1.5bn 

Wagers made on the World Cup in the UK alone

274



Capacity of the esports stadium being launched in Macau at Melco's Studio City resort

18%

Increase in Pagcor H1 revenue



23



Number of legal gambling establishments in Nairobi, out of a total of 85

€6.7M 

Jackpot won by a 27-year-old Swedish player just hours after signing up to letsbet.com

Finally for MGM came the announcement of a deal with the NBA, which sees the company become the official gaming partner of the league. One of the major focuses of the deal from the NBA's perspective is MGM's commitment to integrity efforts. As a result, the NBA and WNBA will provide data as well as the use of their league logos across MGM's sports betting platforms.

NBA Commissioner Adam Silver said: "Our collaboration will result in the best possible gaming and entertainment experience for consumers through the use of accurate, real-time NBA and WNBA data, and our collective efforts to maintain and enhance the integrity of our games."

Not to miss the boat, Caesars Entertainment was sure to make its own voice heard in the sports betting space this week. The company announced it is currently "moving quickly" to introduce sports betting facilities in both its New Jersey and Mississippi properties.

Mark Frissora, the operator's President and CEO, said: "The recent Supreme Court ruling allows us to expand our sports betting digital and mobile offerings into new markets. We recognise that our customers expect exciting new experiences, which is why we will continue to offer new products through our mobile and digital platforms and inside our properties."

Caesars' Atlantic City properties include Bally's Wild Wild West, which opened its sportsbook on Tuesday, and Harrah's Atlantic City, which opened on Wednesday. Caesars will also introduce its new sports betting app across New Jersey to coincide with the opening of the retail sports betting launches.

Mississippi sports betting shops are set to open in Caesars' Horseshoe Tunica and Harrah's Gulf Coast in mid-August, just before the NFL season begins in September.

Supplier Scientific Games has already partnered with Caesars to provide its OpenBet sportsbook platform in New Jersey and Mississippi.

Barry Cottle, Scientific Games President and CEO, said: "This is a pivotal deal that will shape the US sports betting landscape for years to come. Our SG Digital team is excited to help Caesars build for the future, as they expand their sports betting across land-based, digital and mobile platforms into newly-regulated markets."

Finally there was GAN, with the supplier executing a material contract with Parx Casino to offer sports betting, both online and retail, in Pennsylvania.

Jeff Berman, CCO of GAN, said: "Following the execution of this extension and amendment, GAN now offers clients a platform equipped with multiple options for integrated sports betting to be launched seamlessly alongside GAN's market-leading internet casino product."

MACAU GGR RISES 10% IN JULY

Macau gross gaming revenue increased by 10% year-on-year for July.

Last month's results mark two years of consecutive year-on-year revenue growth in China's only hub for legal casino gambling, with the last decrease reported for July 2016.

Figures from Macau's Gaming Inspection and Coordination bureau showed July's revenue reached 25.33bn MOP (\$3.14bn).

Year-to-date revenue is up by 18% from the same point in 2017, to 175bn MOP, as the island's economy is recovering from reduced revenue from 2014 to 2016, due to a suppression of fraud and economic problems among other factors.

Growth in the VIP sector in Macau has cooled in the past couple of months; analysts suggest part of the reason behind this was down to large scale betting on the World Cup.

The VIP market is dependent on junket operators, whose job it is to entice high rollers to casinos in Macau, and slower economic growth alongside other exterior factors can hinder the amount of VIP visitors to Macau.

This past year has seen a shift in attitudes from operators in Macau, as they focus more time targeting the mass market over traditional VIP bettors. This shift has led to the mass market growing and outpacing VIP growth in the second quarter for the first time since the start of 2017.

It is thought operators are keen to target the premium sector of the mass market; tourists who come directly to Macau to gamble.

Analysts expect growth to be increased again next month by up to 15%, due to reduced operations after typhoons hit the island at the end of August last year.



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Increase in
SJM Holdings
net profit
for Q2



\$844.7m

Scientific Games'
revenue for
Q2 2018, up 10%



\$1.61bn



Wynn Resorts'
operating
revenue for
Q2 2018, an
increase of 9%

IGT Q2 REVENUE HIT AFTER DOUBLEDOWN SALE

IGT's revenue reached a plateau for the second quarter of 2018; this is notably down to the sale of its DoubleDown social casino subsidiary and jackpot expenses.

The total revenue of \$1.2bn was a 1% year-on-year decrease for the supplier.

According to IGT, revenue was heavily impacted by jackpot expenses and the sale of Double Down to an affiliate of DoubleU Games to the tune of \$33m.

Operating income grew 9% to \$209m, while EBITDA increased by 4% to \$442m and reported net debt went up 8% to \$7.5m.

Marco Sala, CEO of IGT, said: "The strong second quarter results reflect continued global lottery expansion that is accentuated by disciplined expense management."

The North American lottery segment saw a 5% revenue increase to \$270m.

Sala added: "The North America Lottery and Italy segments each

exceeded our expectations in the period. The North America Gaming installed base grew sequentially and we have a compelling roster of new, for-sale video reel games coming to market in the second half. The strong start to the year gives us confidence we can achieve our 2018 strategic and financial goals."

Alberto Fornaro, CFO of IGT, said: "With better-than-expected adjusted EBITDA growth of 10% in the first half, we are raising our full-year outlook for the underlying business. As a result, we are able to absorb the negative impact of foreign currency translation and maintain the adjusted EBITDA range of \$1,700-\$1,780m for 2018."

The quarter also saw IGT agree sports betting deals with operators MGM Resorts and Borgata Hotel Casino & Spa in New Jersey. IGT already provided retail sports betting to 10 major Las Vegas strip properties. IGT's sports betting wagers for the quarter totalled €224m, up 8%.

THIS WEEK'S WINNERS AND LOSERS

WINNERS

BetSid - A Lancashire-based bookmaker that has just launched its online betting platform

SBOBET - Signed a two-year deal with the German Bundesliga's Borussia Dortmund to become its official betting partner in Asia

MG & E - Its Brockton casino plan that was declined two years ago will be reviewed in September by the Massachusetts Gaming Commission

Arkansas casino - The proposal has been given a 30-day extension for valid signatures

The Tote - Takings saw a combined decrease of over €407,000 at the second day of the Galway Racing Festival

LOSERS

THE WEEK IN QUOTES

"We've historically been opposed to extending sports betting on our game, and, emotionally, I don't think that's changed. However, it is a fact of life in light of the Supreme Court's ruling, and it'll be up to states to decide whether or not they're going to enact sports betting."

NHL Commissioner Gary Bettman on the spread of sports betting

"If I had my way, I wouldn't have advertising of any access to gambling platforms in sport at all. I really worry when I read the cases. I visited the Hope House in Mayo recently who have been a great assistance to some people who have got over what is, hopefully, a terrible temporary problem. I think in a way we should protect our sports of keeping them free from this kind of stuff."

Ireland's President Michael D. Higgins on banning gambling advertising

"We are excited to have Apax on board as we look to capitalise on the significant expected growth in the sports data and regulated betting markets, including substantial opportunities in North America."

Mark Locke, CEO of Genius Sports, on the company's acquisition by Apax Partners

PUTIN INTRODUCES NEW GAMBLING LAW IN RUSSIA

Vladimir Putin has signed a law in Russia which allows for harsher punishments and reprisals for gambling organisations which are deemed to be unlawful.

Undoubtedly, the move is part of wider effort by the Russian government to regulate its gambling market and another assault in its eternal battle against organised crime.

Currently, Russia allows gambling activities to take place in four regional subject areas; Kaliningrad Oblast, Azov City, Altai Krai, and Primorsky Krai. All four are located on the outskirts of Russia, where they can be accessed more easily by tourists. Any gambling activity outside one of these zones will be subject to the new laws and stricter punishments.

The new punishments approved by Putin include a two-year prison sentence for casino operators who offer gambling without an appropriate licence, if they offer online gambling outside the gambling zones, along with a fine of 500,000 rubles (\$8,000).

If the operation is run by a group as opposed to an individual, then the prison term can increase to as much as four years. The fine would also increase to 1m rubles.

However, the real kicker is if the operation is deemed to have been run by an organised crime group, or if it is an operation of an incredibly large scale, then the accused can face as much as six years in prison and a fine of 1.5m rubles.

The tiered system of punishment highlights Putin and Russia's concerns. Yes, they dislike unregulated gambling. But it is the ties with organised crime they are particularly concerned with.

In Russia, between May 2016 and May 2017, it is estimated more residents used illegal offshore bookmakers than the services of legal Russian bookmakers. According to Bookmaker-Ratings research, 1.41m Russian's used illegal offshore sites compared to just 820,000 who used legal Russian bookmakers.

GAMBLING COMMISSION TO PUNISH OPERATORS TREATING CONSUMERS UNFAIRLY

The Gambling Commission has plans to implement tougher punishments on breaches of advertising and consumer laws from 31 October.

Once the new rules come into place, it will be easier for the regulator to take legal action against businesses that have advertising which appeals to children or makes gambling look glamorous.

Operators will be accountable even if they use third party affiliates for advertising campaigns.

As it stands, the regulator can only issue fines to operators for misleading advertising campaigns.

Neil McArthur, Gambling Commission Chief Executive, said: "Protecting the interests of consumers is a priority for us and needs to be a priority for gambling operators.

"These changes will protect consumers from irresponsible advertising and misleading advertising and misleading promotions, ensure consumers can withdraw their money more easily, and will mean consumer complaints are dealt with more swiftly."

The regulator has also pledged to implement a better complaints process for customers, setting an eight week deadline for complaints and issues to be resolved by operators.

Alongside this, action can be taken against gambling companies that send spam marketing emails and texts to consumers.

McArthur added: "For the time being our focus is around this piece of work allowing us to be tough and really crack down on operators who are not complying with the Advertising Standards Authority rules around advertising."

A number of complaints have been made by the public recently in regards to the sheer amount of gambling adverts that were broadcast during live World Cup matches.

The Gambling Commission has said these new rules will make it easier for them to take action over consumer law breaches, which includes misleading and unfair promotions and bonus offers, and even unreasonable restrictions replaced on consumer withdrawals.

NV STRIP RISE STRETCHES TO FIVE MONTHS

Gaming revenues for both Nevada and the Las Vegas Strip rose year-over-year for the fifth straight month in June.

The state and the Strip both outpaced year-to-date growth as well.

Reno continues its upward trend, with revenues rising 19.78% in the month and 6.66% year-to-date.

On the Strip, blackjack and baccarat both grew revenues double digits as both win and table drop improved.

June had an extra Saturday this year vs. last.

JURISDICTION	REVENUE (\$)	CHANGE (%)
Nevada	933.004m	+4.17
Las Vegas Strip	523.921m	+5.36
Clark County	790.981m	+3.45
Downtown LV	44.015	-4.41
North LV	20.152	-4.02
Laughlin	36.356	-1.87
Boulder Strip	60.893	+3.67
Mesquite	9.464	+10.34
Balance of County	96.180	+0.26
Las Vegas locals market	177.226m	+0.89
Washoe County	77.775m	+15.92
Reno	59.363	+19.78

JURISDICTION	REVENUE (\$)	CHANGE (%)
Sparks	11.257	+12.94
North Lake Tahoe	2.220	+5.01
Balance of County	4.936	-9.47
South Lake Tahoe	18.717m	-8.65
Elko County	23.956m	+5.48
Wendover	16.192	+7.53
Balance of County	7.764	+1.45
Carson Valley Area	9.028m	+7.34
Other areas	12.546m	+1.37

REGION	REVENUE (\$)	CHANGE (%)	WIN PERCENTAGE	
			2017	2018
Blackjack	78.975m	+22.30	12.38	13.81
Baccarat	72.280	+12.27	10.48	11.59
Total Games	269.599	+16.68	13.07	14.42
Slots	254.322m	-4.47	8.38	7.66

US STOCK UPDATE

The only US stock to hit a 52-week high ahead of second quarter earnings this week was Tropicana, which reached \$73.24 a share.

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TOP TRENDS IN THE ASIAN GAMING SECTOR

A spokesperson for software supplier BBIN outlines the three main developments it expects to see in the Asian i-gaming sector

The i-gaming industry is not only highly related to the development of new technologies; it is also influenced by users' preferences and behavioral patterns. Through interaction with other major system providers, we see different market potentials and demands.

In recent years, many system providers keep increasing their competitiveness and highlight the positive competitions and collaborations with other brands. To broaden the market scale and to create more profits, it is important to take an integrative strategy of uniting resources. We have developed the Asian market for almost 20 years and know the various cultures of all Asian regions. Through collaborations and idea exchanges with various business partners, not only do we enrich the diversity of our products, but we also find three major developments and trends in the Asian i-gaming system services and products.

1. EMPHASIS ON INTERACTIVITY

From live casino products to lottery products which utilise live-streaming technology, we find customers care more and more about the interactivity between products and players. We also notice the social interactive functions of the games have evolved greatly from allowing multiple players in a single game to allowing players to be bankers. This shows players nowadays are taking a more active role for a customised and unique gaming experience.

2. LOCAL PRODUCTS BECOME MORE AND MORE POPULAR

Apart from new types of roulette games, there has been an Asian craze for "fishing" games, where players can enjoy a deep-ocean experience of catching many different magnificent species of fishes and creatures to win rewards. Our fishing product "Fishing Master"

for example, encourages players to win more than once with multiple-level props and four reward systems. This game also allows social interaction between players and enables an even more engaging experience. Because of its unique and localised gameplay mode, "Fishing Master" is particularly well received among players.

3. BACKEND SERVICE UPGRADE

How does the backend system facilitate an easier and better customer experience? This has been a major challenge for many system providers. Thanks to the advancement of new technologies, the backend system is now capable of automatic and real-time management. Online system providers nowadays can offer diverse functions such as online automatic payments (withdrawal and deposit), artificial intelligence customer service, white-list editing and risk control of money flow. We highlight the importance of a user-friendly backend system and also take customers' promotional needs into consideration. We provide various operational events tools for customers to use freely. For example, our system function allows customers to provide corresponding bonus rewards to their players of different levels.

"We notice the social interactive functions of the games have evolved greatly from allowing multiple players in a single game to allowing players to be bankers"

We also get ahead of the game to study the advantages of the blockchain, such as "currency concatenation" and "game fairness." By keeping up with the global trends and latest technologies, we hope to innovate new types of games and to provide more advantageous services to the market.

Application programming interface (API) has become another trend and keeps gaining more and more popularity. As it integrates the local products and technological advantages of the major system providers in the region, API can effectively lower the cost and risk of new market development and promotion. In view of these advantages, we welcome the opportunity of collaborating with system providers from all over the world to nourish an even more international market.

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