



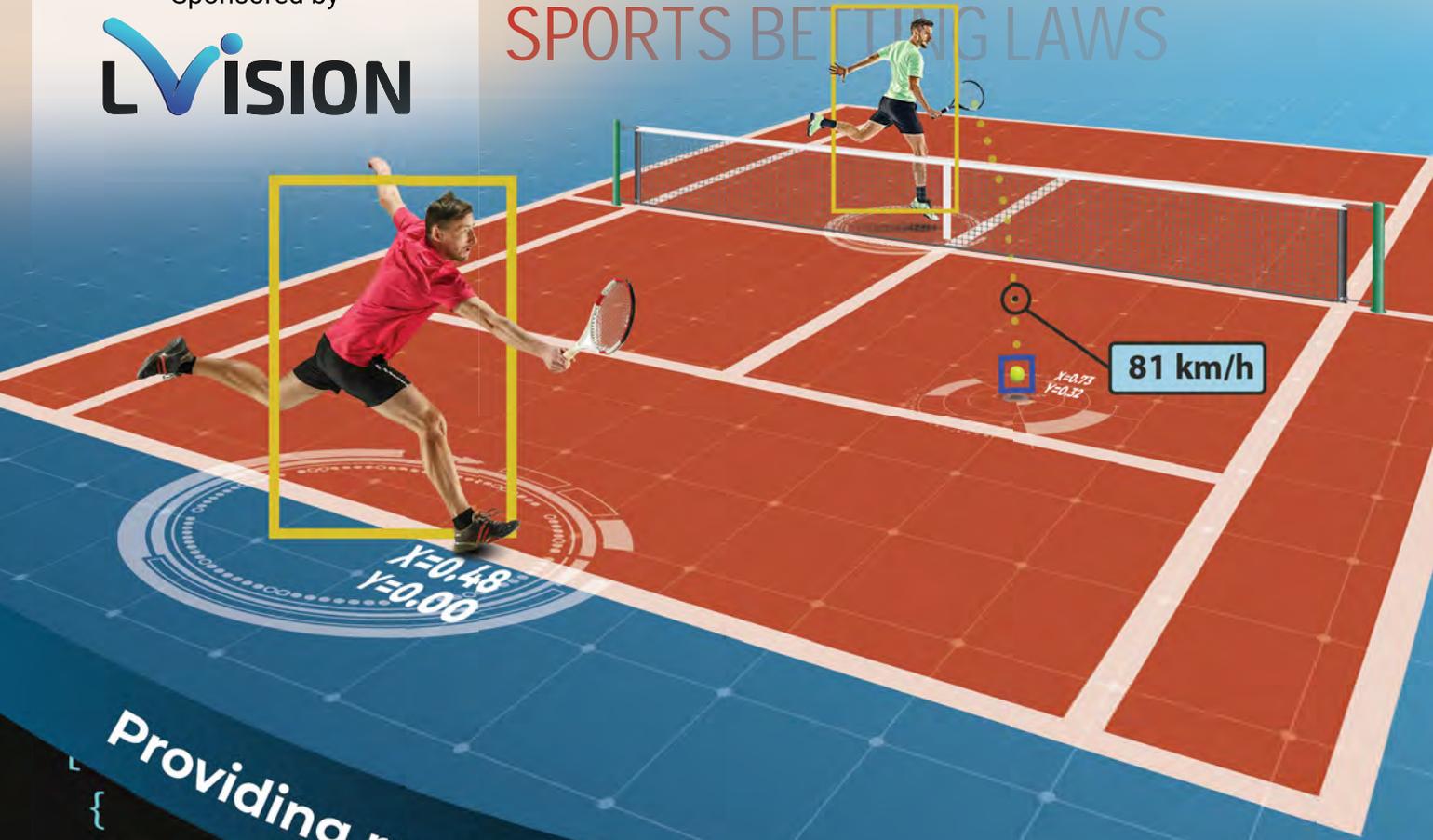
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WEEK 49

FRIDAY 07 DEC 2018

DRAFT BILL TO GIVE FEDERAL GOVERNMENT FINAL SAY ON SPORTS BETTING LAWS



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Providing real-time sports data & statistics

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DRAFT BILL TO GIVE FEDERAL GOVERNMENT FINAL SAY ON SPORTS BETTING LAWS

THIS WEEK

- **SG Digital speaks to GI about Don Best acquisition**
- **Wynn Resorts Chairman in defiant mood**
 - **Macau stretches its run of growth**
 - **Kindred and Kambi extend deal to NJ**

GUEST COLUMNIST:

- **Yossi Barzely, Chief Business Development Officer, Pragmatic Play**

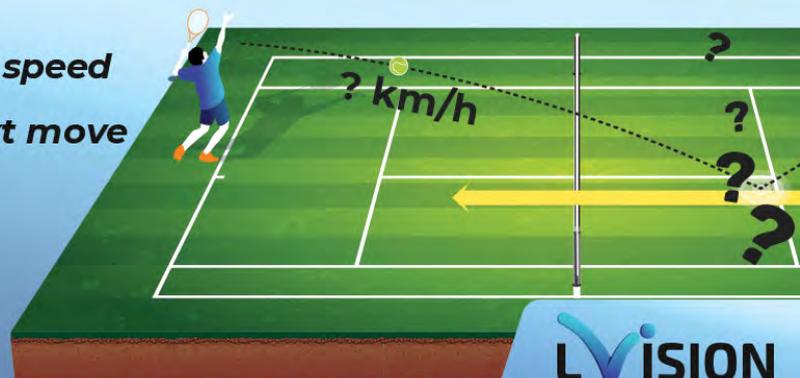


A draft of a sports betting bill that would give the federal government final say on states legalising sports betting has appeared in Congress.

The bill prevents states from unilaterally passing laws on sports betting, contradicting the decision in May where the Supreme Court overruled the Professional and Amateur Sports Protection Act (PASPA). ▶

Imagine you knew the serving player **ball speed**
Imagine you can offer bets on players **next move**

Now stop imagine and see for yourself!



THIS WEEK IN NUMBERS

17

January, the new date William Hill's acceptance period ends for its offer to buy MRG



20

IGT Chairman Donald R. Sweitzer is to retire at the end of year after 20 years with the supplier

30%

Year-on-year rise in gross gaming revenue in Q3 for Spain's online gambling market, to €181.7m (\$206.4m)



£1m



Amount Videoslots will pay to a National Responsible Gambling Strategy project in lieu of a fine (\$1.3m)

Seven states already allow sports betting, with more likely to have approved sports betting legislation before the drafted bill can be passed. It is not clear what their position will be should the bill be approved.

A statement from the bill said: "To request approval to administer a state sports wagering program, a state shall submit an application to the Attorney General at such time, in such manner, and accompanied by such information as the Attorney General may require."

The bill would give veto power to the federal government on state sports betting laws, should that state fail to meet minimum standards and would ban states from permitting betting on amateur events.

It does, however, allow college sports betting.

Further details of the bill include setting up minimum standards for dealing with problem gamblers, allowing data to cross state lines and mandating the use of official league data.

Assessing the issue of official data from the leagues, the drafted bill says that in regard to any bet placed before 31 December 2022, the operator shall determine the result only by use of data that is licensed and provided by the applicable organisation or an entity expressly authorised by the applicable organisation to provide such information.

The bill also discusses the federal excise tax of 0.25% of total handle, saying it will be placed in a "wagering trust fund" for use on sports betting matters.

With this money, the bill creates and funds a National Sports Wagering Commission and a national sports wagering clearing house, which will work to coordinate between national and state level issues on sports betting.

The draft was circulated by the office of Senator Orrin Hatch.

Hatch and Senate Minority Leader Chuck Schumer have previously made their anti-sports betting opinions well known.

Speaking on the Senate floor on 23 August, Hatch said: "I'd like to say upfront that I am not a fan of sports betting.

"I have grave concerns about gambling in general, and sports betting in particular."

In a public statement from the same month, Schumer said: "As a New York sports fan ... and a senator, my priority ... is making sure the integrity of the games we love is preserved, that young people and those suffering from gambling addiction are not taken advantage of, and that consumers that choose to engage in sports betting are appropriately protected."

State representatives and industry officials have been outspoken since the bill was made public.

Chris Cylke, the American Gaming Association's (AGA) Vice President of Government Relations, is quoted as saying: "Since the Supreme Court's ruling in May, the American Gaming Association has consistently maintained that federal legislation regarding sports betting is not necessary.

"That underlying position remains unchanged. At the same time, we remain committed to maintaining an open and constructive dialogue with policymakers considering sports betting legislation at any level of government."

Dina Titus, Congresswoman for Nevada, is quoted as saying: "This draft bill raises serious questions about the treatment of states like Nevada that already successfully regulate sports betting.

"The Supreme Court's decision overturning PASPA was not an invitation for the federal government to repress states that have led the way. I'll continue to fight for Nevada's best interests in these discussions."



Lightning Box has agreed to supply its content to online operators in North America via an expanded deal with SG Digital in the early part of the year

£5.9m

Casumo's fine for failing to detect fraudulent customers in Great Britain



THIS WEEK'S WINNERS AND LOSERS

WINNERS

Betsson, Global Gaming & Kindred Group
- Received their licenses to enter the re-regulated Sweden market

Australia - Governments across the country have formally committed to the National Consumer Protection Framework for online wagering

Jim Murren - The MGM Resorts International CEO spoke out against integrity fees after his company announced a gaming partnership with MLB

Missouri - Lawmakers are weighing up an attempt to legalise sports betting in the state

CZ Holdings - Surrendered its Great Britain license after a review from the Gambling Commission

LOSERS

DON BEST DEAL WILL SPECIFY US OFFERING, SAYS SG DIGITAL EXEC

SG Digital's acquisition of Don Best Sports tailors the supplier to the US market, according to Keith O'Loughlin, Senior Vice President of Sportsbook and Platforms.

O'Loughlin told *Gambling Insider* the deal to buy the betting data supplier will complete the puzzle by helping SG Digital to provide a full turn-key sportsbook, improve its pricing and trading elements, and enhance its US market presence.

He said: "What Don Best does is give us a very specific US product for the US market. It's the only business of its kind that provides a forum with US traders on the ground.

"What that means is more events, and then the other product across US sports gives it a more marketable event, it gives better and more accurate pricing and gives less

suspension times. The Don Best trading forum is all done in the US and it's still the only platform provider that does so."

SG Digital will integrate Don Best's trading and pricing into its OpenBet platform.

O'Loughlin believes Don Best is above the rest in the field and says its only competition comes from European platform providers and those working with in-house options.

He said: "US sports, for a European sportsbook, make up roughly between 2% and 5% of the total handle and so it doesn't get the love, attention and innovation that it takes to make a product a great success.

"Don Best has been serving the Las Vegas market for 20 years and really is the leader in the market."

WYNN RESORTS CHAIRMAN: WE WILL OUTPERFORM OUR RIVALS WITHOUT STEVE WYNN

Wynn Resorts Chairman Phil Satre is confident the operator can still outperform its rivals without the presence of former Chairman and CEO Steve Wynn.

Wynn was the driving force behind the company's success since its foundation in 2002, but resigned in February following allegations of sexual misconduct.

More recently, Wynn filed a lawsuit against Wynn Resorts and the Massachusetts Gaming Commission, stopping them releasing any reports about their investigation into him, with a temporary block being granted.

That lawsuit states: "Mass Gaming officials have conducted their months-long investigation into Wynn Resorts with total disregard for protecting the privileged communications of Mr Wynn.

"They have simply donned the judge's robe, cracked the gavel, and unilaterally determined Mr Wynn has failed to sustain his burden

of establishing that any privilege applies to the unknown universe of documents acquired during the Mass Gaming investigation."

Satre – appointed Chairman in November – believes the operator will continue to deliver strong results away from Wynn's leadership.

He told *CommonWealth Magazine*: "I will tell you this – Encore Boston Harbor will meet everybody's expectations of what a special experience it is to be in a Wynn Resorts property.

"What I'm saying is we can separate Steve from the company and still accomplish everything we promised here. We will be the finest hotel casino property on the East Coast of the US.

"We will outperform anybody else in the state of Massachusetts in terms of casino performance – however you want to measure it. I'm confident of that. We don't have to have him as the Chairman and CEO of the company to do that."

THE WEEK IN QUOTES

“These days, tricking Google is still possible in some ways but it’s a short-term strategy. The important questions are: how meaningful is your content? How easily indexed is it? Are you providing the right answer for someone as an operator or affiliate? Can people do what they need to do on your site?”

Blueclaw Marketing Director Martin Calvert discusses SEO at SiGMA

“Bargaining power has changed completely. Today, banks select their clients and not the other way around. We have to work with banks because we are running an online business. But, in order to do so, we have to deal with security, fraud and chargebacks, cross-border transactions and rapid changes”

Finance and Tax Consultant Viktoria Soltesz comments on gaming’s relationship with banks at SiGMA

“Sports betting is about to change and sports data development will play a very significant role in this transformation. Sport doesn’t make sense without data. It’s the most interesting content online, always being fresh and exciting. Betting companies can take this as a starting point to engage customers”

Betegy CEO & Founder Alex Kornilov talks about data within sports betting

“If there’s a game that’s 10-1 in the seventh inning, people might tune out but the thought is now you’ll stay in, watching, because you’re engaging in betting on the outcome of what may happen”

Boston Red Sox President and CEO Sam Kennedy discusses legalised US sports betting’s effect on fan engagement

MACAU CASINOS POST 28TH CONSECUTIVE MONTH OF GROWTH

Macau’s Gaming Inspection and Coordination Bureau announced monthly casino revenue of MOP25bn (\$3.1bn) for November; a 9% increase year-on-year.

The results provide the world’s largest gaming hub with its 28th consecutive month of year-on-year growth.

This, however, does not represent a complete recovery. This is the third month in a row in which Macau has achieved single digit growth, with September and October recording the weakest results in more than two years.

Forecasts for the month predicted growth between 5% and 10%. November’s revenue represented acceleration from October’s 3% growth rate.

Year-to-date accumulated revenue up to the end of November is up 14% to MOP276.38bn. Casino revenue for October was MOP27.33bn; an increase of 2% year-on-year.

The November results follow a slow Q3 for the island’s economy, as gross domestic product (GDP) only grew 1% in the period.

A report from Macau’s Statistics and Census Service showed the island’s rate of growth was at its lowest point for more than two years, with exports of gaming services rising by 5.8% year-on-year during the third quarter.

By comparison, in the second quarter of this year, exports of gaming services grew by 13%, according to official data.

A statement from the statistics bureau reflected on the Q3 performance and said: “The economy grew at a slower pace, mainly due to a continuous decline in construction investment and a notable slowdown in growth of exports of services.” Macau’s last year-on-year monthly fall in casino revenue came in July 2016 (MOP17.77bn), at the end of a 26-month run of declines.

KINDRED AND KAMBI EXPAND RELATIONSHIP TO COVER UNIBET NEW JERSEY

Kindred Group has reached an agreement with Kambi to extend the pair’s current agreement, allowing Kindred to use the supplier’s sports betting platform in New Jersey under the Unibet brand.

Kindred signed a deal with Hard Rock Atlantic City in August, allowing it to pursue a Casino Service Industry Enterprise License, and has a long-standing association with Kambi, which used to operate under the Kindred umbrella.

The operator also has a partnership with SG Digital, a branch of Scientific Games, to use its Open Platform System and Open Gaming System in the Garden State.

Manuel Stan, Senior Vice President at Kindred US, said: “We are of course delighted to add this final piece to our product offering towards customers in New Jersey. Kindred and Kambi have a long and successful history together, which we intend to develop further as we prepare to enter the New Jersey market.

“I am particularly pleased that we are now ready to offer customers in New Jersey a truly great experience in a safe and secure environment.”

Max Meltzer, Kambi Chief Commercial Officer, said: “The partnership between Kambi and Kindred, which goes back many years, continues to deliver consistent sports betting growth in Europe and other parts of the world, illustrating Kambi’s ability to empower visionary operators to become sportsbook market leaders.

“As industry innovators, Kindred has leveraged the flexibility of the Kambi platform to develop truly unique and differentiated sports betting experiences for its players and we look forward to supporting Kindred in bringing those to the US.”

In May 2014, Unibet shareholders approved the proposed spin-off of Kambi, its B2B subsidiary. The company’s 95% stake in the business was subsequently distributed to Unibet shareholders.

PA SLOTS RISE

Pennsylvania slot revenues rose 0.96% in November. Results were marred by soft year-on-year comparisons in north-east Pennsylvania, which has been hurt by Empire Resorts' Resorts World Catskills in New York all year.

Casinos outside of the north-east grew 3.94%.

Individual casino results were led by Boyd Gaming's recently-acquired Valley Forge casino, which rose 18.83%.

November had nine Fridays and Saturdays this year versus eight last year.

MARKET/PROPERTY	REVENUE (M)	(%) CHANGE
PHILADELPHIA:		
Valley Forge (BYD)	\$7.423	+18.83
Parx (Greenwood)	\$33.080	+9.52
Harrah's (CZR)	\$15.183	+0.58
SugarHouse (Rush Street)	\$14.010	-1.52
Philadelphia total	\$69.696	+5.97

MARKET/PROPERTY	REVENUE (M)	Y-O-Y(%) CHANGE
NORTHEAST PA:		
Mt. Airy	\$11.227	-5.05
Sands Bethlehem (LVS)	\$22.555	-6.46
Mohegan Sun	\$14.569	-7.70
Northeast PA total	\$48.351	-6.51
PITTSBURGH:		
Rivers (Rush Street)	\$22.650	+8.08
The Meadows (PENN)	\$16.184	+0.66
Pittsburgh total	\$38.834	+4.86
ELSEWHERE:		
Hollywood (PENN)	\$15.830	-0.68
Lady Luck Nemaocolin (ERI)	\$2.070	-2.52
Presque Isle (ERI)	\$8.288	-5.18
State total	\$183.069	+0.96
MULTIPLE PROPERTIES:		
Rush Street	\$36.660	+4.20
Penn National	\$32.013	flat
Eldorado Resorts	\$10.358	-4.66



GI FRIDAY... A GREAT END TO A WEEK



GUEST COLUMNIST

YOSSI BARZELY

CHIEF BUSINESS
DEVELOPMENT OFFICER,
PRAGMATIC PLAY

Barzely discusses elevating video slots and what development studios must do to drive player returns

The world of online gaming is becoming increasingly crowded. As more and more providers enter the market and refine their portfolios, it can be easy to get lost in the crowd. The challenge development studios face at the current time is ensuring their products stand out.

Lately, this has been attempted through the increasing gamification of slot games and wider portfolios. While this can be effective, gamification features can quickly descend into little more than novelty and finding a way to maintain visibility becomes increasingly difficult. As Pragmatic Play has found, it is excellent core gameplay that ultimately drives player returns.

THE BID FOR RETENTION

Understandably, in the face of intensifying competition and an increasingly saturated market landscape, many providers to the online gaming industry are turning to a range of new tools to deliver an experience capable of both attracting and retaining players in the long term.

Factors such as leaderboards and achievements are increasingly being looked to by slot developers as a means of keeping players coming back. The proposition here is a straightforward one; by providing players with a lasting token of their play session and a yardstick by which to compare themselves to their fellow players, they are more likely to return.

An extra layer of engagement on top of the base game to build player loyalty is becoming an increasingly prominent weapon in the armoury of providers in regulated markets, giving players the opportunity to pit their wits and skills against one another.

However, gamification and social features should not come at the expense of good gameplay and it is fair to say that, for all these additional bells and whistles, slots fans still desire immersive gameplay above all else. More fundamental factors like the size of the game and load times remain more important on both mobile and desktop.

Several studies have shown players close games with load times of more than two or three seconds, and providers must be cautious of allowing extra features to bog down the functionality of their products, making them inefficient on older phones and weaker connections in particular.

All this is not to dismiss the benefits of layering additional features for player communication or competition, as engendering those all-important water-cooler moments can drive engagement around an online gaming product.

ELEVATING THE VIDEO SLOT

However, great gameplay is what will ultimately keep players coming back. At Pragmatic Play, we have a strong commitment to innovation, which adds an extra layer of interactivity to the relationship between player and game, but are acutely aware this must not undermine the central gameplay experience.

While customers certainly play their favourite games to be entertained, the underlying appeal is the opportunity to win potentially life-changing sums of money. The fundamental tenets of slot play must not be diluted, because reducing a game to the sum of its distractions runs the risk of turning core slot players off.

By way of example, one of our most recent releases, Jade Butterfly, gives players the opportunity to create their own winning formula, by allowing players to spin an individual reel if they feel a winning spin is within reach.

This feature adds an entirely new perspective to the game and Jade Butterfly can easily be transformed into a slot that features a considerable amount of strategy. This, allied with its exciting free spin feature, creates a truly unique slot experience.

The Champions was released to capitalise on the 2018 Fifa World Cup and features a target that players can move up and down the reels, leading to bigger wins when the football symbol appears inside.

Both are clear examples of the kind of innovation we aim to provide, enhancing the core gameplay while not distracting from the fundamental enjoyment that comes from spinning the reels. In the world of video slots, content and gameplay are still king; providers must be aware of not drowning the fundamental enjoyment of their game in a raft of gimmicks.

Put simply, it is expertly modelled gameplay built on a foundation of solid and considered maths-modelling that will engage slot audiences in the long term.

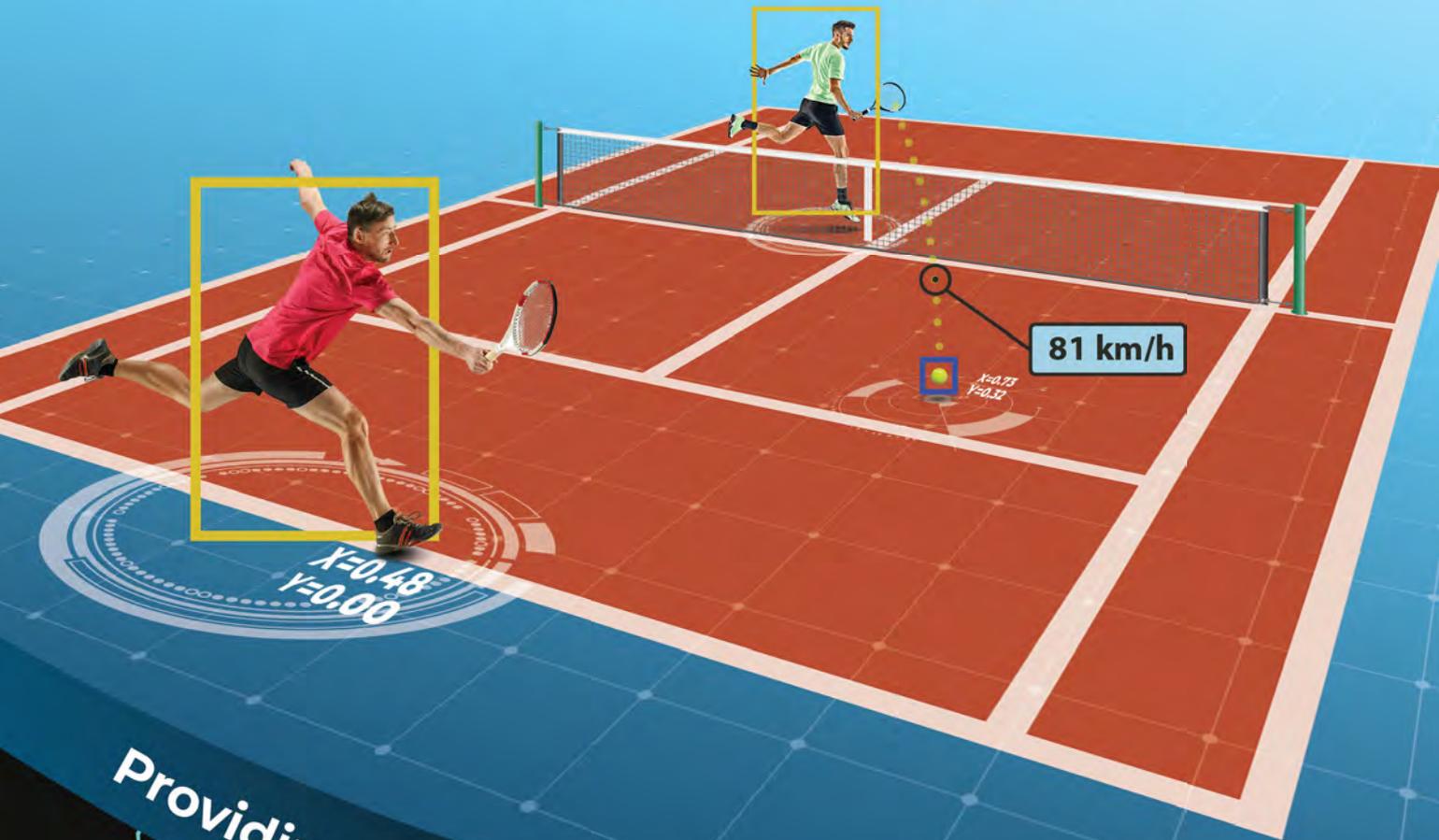
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