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THIS WEEK

- **Another pre-regulation New York sports betting partnership confirmed**
- **Gavin Isaacs back in town with SBTech**
- **Fantini report: Louisiana gaming revenue breakdown**

GUEST COLUMNIST:

- **Richard Thorp, Business Development Director, FSB**

WEEK 01

FRIDAY 04 JAN 2019

GLOBAL GAMING AWARDS LONDON SHORTLIST CONFIRMED



It's a new year, and that can only mean one thing; The Global Gaming Awards London 2019 ceremony is just around the corner.

The gaming industry's most successful companies have made it into the prestigious Shortlist, and are now being contacted ahead of the ceremony at the Hippodrome Casino on Monday 4 February.

The Global Gaming Awards London is intended to be one of the standout events on the calendar for any leading executive within the gaming industry, as the ceremony creates the biggest gathering of industry Chief Executives in one room at any time of the year.

Completion of the Shortlist follows a lengthy and detailed process, where self-nominations, together with the nomination panel's recommendations, have been narrowed down into the final Shortlist in each category.

This year's nomination panel consists of Alex Pratt, Managing Director at iGaming Business, Steve Donoughue, CEO at GamblingConsultant.co.uk, Tal Itzhak Ron, Managing Partner at Tal Ron, Drihem & Co., Law Firm and Ollie Drew, Director at Square in the Air. The winners will be announced over an afternoon tea at the Hippodrome.

WEEKLY payouts



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THIS WEEK IN NUMBERS

£25m
 The figure Playtech agreed to pay Israeli tax authorities following investigation (\$31.6m)

Hong Kong citizens arrested for partaking in illegal online baccarat games **9**

2 New Jersey casinos were fined for accepting illegal bets involving NJ college teams

Being nominated in the Global Gaming Awards is a clear sign of success for any organisation, as the ceremony is renowned within the gaming industry for its rigorous approach and fairness.

A total of 16 Awards will be presented in the following categories: Betting Shop Operator of the Year, Online Sports Betting Operator of the Year, Retail Supplier of the Year, Online Sports Betting Supplier of the Year, Casino of the Year, Online Casino of the Year, Casino Supplier of the Year, Online Casino Supplier of the Year, Casino Product of the Year, Payment Solution of the Year, Corporate Services Provider of the Year, Online Bingo Operator of the Year, Online Poker Operator of the Year, Affiliate Programme of the Year, Corporate Responsibility Programme of the Year and Chief Executive of the Year.

This will be the ceremony's second edition in London, following the launch of the Global Gaming Awards London in 2018. This came after the success of the Global Gaming Awards Las Vegas, an annual event which first launched in 2014.

Among last year's winners were industry giants Novomatic, Bet365, NetEnt, The Stars Group, Kambi and Mr Green. The event showcased the competitive nature of the industry, as 15 separate companies were among the winners across the 16 categories.

It is now over to the panel of expert industry Judges to cast their votes in each category. Each Judge will select a first and second choice for each Award, and the company with the most first-choice votes will receive the Award. Should the voting in any category result in a tie, then the nominee with the most second-choice votes will be crowned the winner. KPMG Isle of Man will adjudicate the voting process to ensure full transparency. The Global Gaming Awards are powered by *Gambling Insider* and BetConstruct is the Lead Partner for the Global Gaming Awards London 2019.

A detailed breakdown of all nominees across every one of the 16 categories will appear in the Global Gaming Awards London 2019 Shortlist magazine, which will be released in January and distributed at ICE London.

Visit www.globalgamingawards.com/london/ for more information on the Global Gaming Awards.



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THE WEEK IN QUOTES

"We are delighted to get the year off to a positive start with the launch of Bwin.se and PartyPoker.se. Launching two new labels in such a short space of time after receiving our licence demonstrates the flexibility of our unique proprietary technology platform."

Shay Segev, GVC's Chief Operating Officer, on launching in Sweden's reregulated market

"This is my last week at Quickspin, The company is doing great, we're growing healthily in both revenue and people. I do, however feel that my part has been played, so it's time to move on. I personally learned a lot from the social side and enjoyed it very much to work so closely with all of you and everyone else at Plumbee [a Quickspin partner]."

Joachim Timmermans CPO at Quickspin, announces his departure from the supplier

CAESARS PAIRS UP WITH ONEIDA INDIAN NATION FOR NEW YORK SPORTS BETTING

Oneida Indian Nation, owner of Turning Stone Resort Casino in Verona, New York, has announced a new partnership with Caesars Entertainment to bring sports betting to the state of New York.

The agreement is subject to a National Indian Gaming Commission Review and the New York State Gaming Commission regulating sports betting.

New York is yet to fully regulate sports betting following the repeal of the Professional and Amateur Sports Protection Act (PASPA) last May.

The agreement between Caesars and Oneida Indian Nation follows November's announcement that Bet365 and Empire Resorts had formed a strategic alliance to offer sports betting in New York when it is regulated. Empire Resorts operates Resorts World Catskills.

Four approved New York commercial casinos can offer sports betting, as a result of a referendum held in 2013, where New York residents voted to legalise sports betting in the state. This includes Resorts World Catskills, Del Lago Resort & Casino (partnered with DraftKings), Tioga Downs Casino Resort (partnered

with FanDuel), and Rivers Casino and Resort (partnered with Kambi).

Senator John Bonacic and Assemblyman Gary Pretlow both tabled bills to legalise sports betting in 2018, but both were unsuccessful.

The partnership will involve sponsorship and loyalty program exchanges, being billed by both the tribe and operator Caesars as a "licensing and branding alliance."

Oneida Indian Nation Representative and Nation Enterprises CEO, Ray Halbritter, said: "When it comes to sports betting, Caesars is in a class of its own. We are pleased to be joining forces."

Christian Stuart, Caesars Entertainment Executive Vice President Gaming and Interactive Entertainment, said: "We are eagerly awaiting the National Indian Gaming Commission's review of this innovative new partnership involving a licensing and branding arrangement.

"The Oneida Indian Nation has already established Turning Stone as the pre-eminent New York gaming destination, which makes the property and its sister casinos fitting partners for Caesars."



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THIS WEEK'S WINNERS AND LOSERS

WINNERS

Macau – Casinos in the gambling hub generated MOP302.85bn (\$37.85bn) in gross revenue in 2018, a 14% year-on-year increase

Spillemyndigheden – In its annual report, report, the Danish regulator announced it had blocked 18 illegal gambling sites in 2018

Penn National Gaming – announced the acquisition of the operations of Margaritaville Resort Casino, Louisiana, for a total consideration of \$115m

NetEnt – The supplier launched new slot game Turn Your Fortune, which takes players back to France in the late 19th century

Italian online operators – saw gross gaming revenue tax rise from 20% to 25% for online casino and bingo, while fixed-odds betting tax rose from 22% to 24%

LOSERS

GAVIN ISAACS MOVES TO SBTECH

SBTech has appointed former Scientific Games CEO Gavin Isaacs as its Non-Executive Chairman.

Isaacs will be responsible for growing the company's US presence, following 2018 partnership agreements in regulated states, including New Jersey and Mississippi.

Scientific Games' revenue grew from \$1.79bn to \$2.88bn (FY16) in two years under his leadership.

Isaacs said: "I was approached by a number of companies since leaving Scientific Games. However, I chose to join SBTech due to its superior technology, high standards across every discipline, entrepreneurial approach and incredible ambition and potential to grow further across a wide variety of regulated markets, including the US where I am based and have an extensive network, knowledge and experience."

Richard Carter, SBTech CEO, said: "We're thrilled that someone of Gavin's calibre, credibility and

experience has chosen to join SBTech. This is a huge coup for the business.

"Gavin's two decades of successfully leading, transforming and acquiring some of the biggest businesses in the gaming sector will be a massive advantage for us, particularly in the US where we have already partnered and gone live with several large brands across multiple states and where there are many more opportunities to grow."

Before joining Scientific Games as CEO in 2014, Isaacs was CEO of shuffling machine manufacturer SHFL Entertainment.

Isaacs also previously spent five years as COO and Executive Vice President at Bally Entertainment and led negotiations for Scientific Games to acquire the supplier for \$1.3bn in 2013. This followed a seven-year stint with supplier Aristocrat Technologies, where he worked in several roles, including President and Managing Director.

LOUISIANA RISES

Louisiana gaming revenue inched up 0.86% in November; a month with nine Fridays and Saturdays this year versus eight last year.

Baton Rouge casinos continued to face challenges with the city's smoking ban implemented in June. Those casinos fell 12.25%.

The state would have been up 2.08%, with Baton Rouge casinos factored out.

Individual year-on-year property growth was led by Eldorado Resorts' El Dorado in Shreveport, which grew 13.7%. It was the property's fourth straight month of growth.

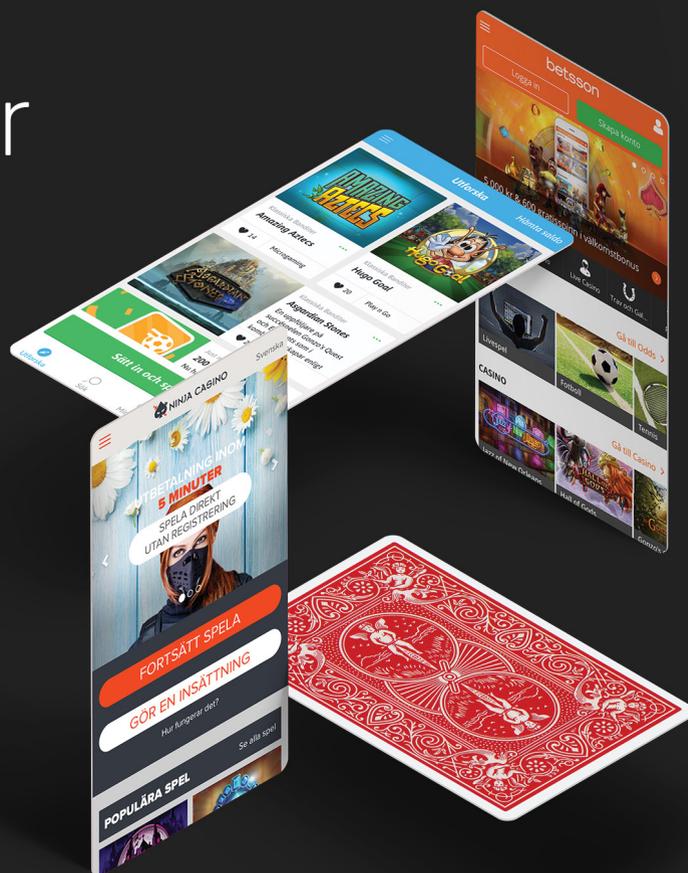
MARKET/PROPERTY	REVENUE (M)	(%) CHANGE
SHREVEPORT/BOSSIER CITY		
El Dorado (ERI)	\$9.697	+13.70
Louisiana Downs (CZR)	\$3.433	+6.33
Horseshoe (CZR)	\$15.667	+2.33
Margaritaville	\$11.965	-0.31
Sam's Town (BYD)	\$5.575	-0.36
Boomtown (PENN)	\$4.125	-5.82
Diamondjacks (Legends)	\$2.565	-22.19
SP/BC Total	\$53.028	+1.31
ELSEWHERE		
Amelia Belle (BYD)	\$3.353	+3.93
Routes, Truck Stops, OTBs	\$48.573	+4.80
State total	\$252.797	+0.86

Caesars led operators, in terms of combined property growth, rising 7.59% and benefitting from double-digit growth at Harrah's New Orleans and growth at Louisiana Downs and Horseshoe Casino in Bossier City.

MARKET/PROPERTY	REVENUE (M)	(%) CHANGE
NEW ORLEANS		
Harrah's (CZR)	\$25.421	+11.29
Treasure Chest (BYD)	\$8.827	+2.37
Fair Grounds (CHDN)	\$3.305	+1.15
Boomtown (PENN)	\$9.216	+0.02
NOLA Total	\$46.769	+6.43
BATON ROUGE/CENTRAL LA		
Evangeline Downs (BYD)	\$6.656	+0.90
L'Auberge (PENN)	\$11.774	-5.63
Hollywood (GLPI)	\$4.203	-14.85
Belle (ERI)	\$2.682	-30.37
BR/C.LA Total	\$25.315	-9.14
LAKE CHARLES/VINTON		
Golden Nugget	\$26.634	+3.90
L'Auberge (PENN)	\$26.994	+1.28
Delta Downs (BYD)	\$14.004	-9.77
Isle of Capri (ERI)	\$8.129	-10.75
LC/Vinton Total	\$75.761	-1.50

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GUEST COLUMNIST



RICHARD THORP
BUSINESS DEVELOPMENT
DIRECTOR, FSB

Thorp outlines his views on what the impending voluntary whistle-to-whistle gambling advertising ban during live sport will mean for the UK market

The trouble with human beings is that while the vast majority of them are good – they tell me only one-in-a-hundred is a psychopath – you can't always rely on them to behave perfectly. This, of course, is why you need laws and systems of governance to regulate and reinforce the better angels of our nature.

That said, self-regulation remains an ideal if idealistic goal. After all, it's much easier if people and organisations play by the rules and treat each other with respect in the first place. So it's been reassuring that, in an industry often maligned for its ethical code, operators are finally getting their heads around self-regulation and their social responsibilities to the public.

The IGRG (Industry Group for Responsible Gambling) has implemented its whistle-to-whistle ban on all TV betting adverts during pre-watershed live sport, with further provisions under its code for socially responsible advertising, and it's great to see some positive and proactive measures being promoted. In fact, you feel if the industry had shown similar fellowship and foresight over the fixed-odds betting terminals debacle, they may not have lost that revenue stream to the £2 maximum bet.

It's often wiser to recognise a judgement in the court of public opinion and accommodate it, rather than sit back in somewhat entitled fashion on a contentious-yet-lucrative issue and wait for the actual courts to legislate for it. I'm sure anyone who grew up under a "don't make me come down there" style of parental government will agree it's always better to play nicely when asked to, lest the subsequent scolding be all the harsher.

As sea-changes go, this best-practice watershed is certainly a welcome shift in perspective and understanding. But it's one which will also create a profound ripple effect in the way operators act and market themselves going forward in Great Britain. Knowing your customer will now extend to discerning whether they can afford to bet with you, or if they even should, thanks to beefed-up anti-money laundering measures.

It's a similar story when it comes to marketing and advertising, which will arguably prove even tougher for the emerging brands against the established stars. One unintended consequence of this ban is that it somewhat enshrines the status and awareness afforded to those big betting brands who have leant heavily on TV advertising to date, thereby already securing their flags in the collective public consciousness. It's going to be hard for anyone else to replicate that exposure now; or, at least, they're going to have to find another more creative way to do so, instead of blanket commercial coverage.

With the rise of SEO as a progressive marketing science, perhaps the focus will move to search and other savvy positioning tools. This could especially be the case when it comes to acquisition and retention, particularly with regard to recruiting the next generation of players via innovative mobile gaming apps.

On the other hand, a reversal of fortune could be in the offing for any responsible affiliates who are well-placed to drive the traffic back to their operator partners. A revenue share is still a small price to pay if that affiliate can profile and corral the right kind of loyal players.

It must be noted the ban has done nothing to limit operators' actions in the domain of online marketing, so smartphones and social media should represent the next acquisitional battleground. Football clubs are also unaffected when it comes to shirt sponsorship of teams by betting firms, and it must only be a matter of time before the industry looks at this too. In the meantime, however, perimeter advertising becomes the prime televisual real estate, and the clubs will doubtless bid to exploit this while they can.

Alternatively, in Great Britain's saturated sportsbook marketplace, maybe many operators won't see so much merit in facing these challenges, and could simply turn their attentions to harnessing the potential of new players in foreign fields - regulated or not. Continents like Africa have constituted a huge growth area for FSB in the past year, and I can only see that trend extending.

All of this neatly brings us back to responsibility and working together to foster better working relations between gambling's trade associations, government, the general public, operators and, most importantly of all, the end customer. Gambling's ecosystem is now in safer, fairer hands. If operators (be they sportsbook or online casino) can continue to be seen as accountable partners, our shared gaming environment will only flourish.

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