



WEEK 22

FRIDAY 31 MAY 2019

**GVC GAINS NEVADA LICENSE,
DONATES SHIRT SPONSORSHIP
TO CHARITY**

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THIS WEEK

- **Jamie Odell moves to Scientific Games**
- **Tennessee to be first mobile-only US sports betting state**
- **Svenska Spel CEO calls for industry to come together**
- **Arrests made in Spanish football match-fixing saga**

GUEST COLUMNIST:

Fabio Massimo Molinari,
Commercial Director,
Vermantia

GVC Holdings has been approved to operate in Nevada following a hearing with the Nevada Gaming Commission (NGC).

On 8 May, GVC was recommended for a two-year limited license by the Nevada Gaming Control Board (NGCB) and the NGC supported this decision in a 4-0 vote.

In the original four-hour hearing with the NGCB, GVC CEO Kenny Alexander was questioned on failings to supervise online gaming transactions in Turkey. This issue could have proven problematic, as the operator progressed to the final stages of operation.

Board member Terry Johnson cast the lone vote against GVC in the NGCB hearing, and chastised Alexander for GVC's operations in Turkey. After the acquisition of Ladbrokes Coral in March 2018, GVC inherited one of its branches in the country. It sold the regional business eight months later and during the hearing, Alexander said GVC is no longer active in the market.

GVC started its hearing with the NGC by apologising for its actions, including its response to the line of questions earlier this month. By most accounts, the CEO did not respond well to the NGCB's inquiries. Alexander said he fully accepted his responsibility as CEO of the business.

Outgoing Chairman, Lee Feldman, brought up the issue of compliance and told the NGC the operator had upgraded its measures in the area. Virginia McDowell, GVC board member, will oversee compliance activities.

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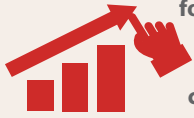
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THIS WEEK IN NUMBERS

A\$1.9bn



Aristocrat's revenue for H1 2019, a 21% year-on-year increase at constant currency (US\$1.31bn)

30

The number of arrests made in Vietnam for running two online gambling rings



\$1m



DraftKings and FanDuel launched a \$1m advertising campaign against a bad-actor clause being discussed in the state of Illinois



\$21m

The price paid by Better Collective to acquire 60% of Nashville-based RotoGrinders

\$35.5m

Wynn Resorts has chosen not to appeal its fine and the \$500,000 levied against CEO Matt Maddox by the Massachusetts Gaming Commission



NGC Chairman Tony Alamo Jr. took a metaphoric approach in his comments. He said: "You have a leash and that gives me some comfort. I don't think I need to shorten the leash. I'm very comfortable going forward you won't step on a nail"

As part of its preliminary approval, GVC was ordered to pay \$100,000 for compliance investigations into its own operations. Representatives of GVC did not challenge the two-year limitation.

During the hearing, Feldman informed the Commission that Roar Digital, the joint venture between GVC and MGM Resorts International, had commenced early stages of operation and opened an office in Las Vegas. Roar Digital has now been awarded licenses in Nevada and New Jersey.

Roar Digital has 14 staff, with Adam Greenblatt, a former Director at Ladbrokes, appointed CEO in October.

GVC currently operates its PartyPoker brand in New Jersey's regulated online market. The interstate liquidity sharing pact between Nevada and New Jersey could mean GVC will soon test the Nevada waters with its poker operations.

Elsewhere, GVC-owned Betdaq has donated its shirt sponsorship of Sunderland Football Club to the Children with Cancer UK charity, a GVC spokesperson confirmed to *Gambling Insider*.

Betdaq was Sunderland's front-of-shirt sponsor last season and will continue paying for its partnership with the club until the deal expires next year.

However, as part of GVC's commitment to "unilaterally ending all football shirt sponsorship deals," Sunderland's shirt will now display the Children with Cancer UK logo instead of Betdaq's.

The development is part of GVC's Changing for the Bettor campaign, which the operator aims to extend to other teams; Betdaq is also Charlton Athletic's shirt sponsor.

GVC has confirmed Ladbrokes, one of its biggest brands, will continue to sponsor the Scottish Professional Football League in name. But any advertising boards related to the sponsorship are being donated to a split of responsible gambling messaging and charitable partners.

Gambling Insider will be discussing the issue of shirt sponsorship in the next edition of its podcast, the *GI Huddle*.

[Click here to listen to the most recent episode](#)



EX-ARISTOCRAT CEO JOINS SCIENTIFIC GAMES AS SPECIAL ADVISOR

Gambling Insider was exclusively told before any other publication that Jamie Odell, former CEO of Aristocrat Leisure, has joined fellow supplier Scientific Games as Special Advisor to the Chairman and CEO.

Odell was Aristocrat CEO for eight years before leaving the company in 2017. During his time as CEO, Aristocrat's market capitalisation grew approximately 477% from \$1.2bn to \$7.5bn.

Before joining Aristocrat, Odell held numerous executive roles in the global beverage industry.

Odell will now offer advice on gaming industry trends and market innovations, working closely with CEO Barry Cottle and directly advising Ronald Perelman, Chairman of the Board.

It is understood Odell will be based in Australia and has been brought in with a particular view to growing Scientific

Games' operations in the country, as well as other markets.

After *Gambling Insider* first reported the news, Scientific Games confirmed the appointment, with both Odell and Cottle expressing their delight.

President and CEO Cottle said: "We are thrilled Jamie will be advising our leadership and our team. We have long admired and respected his success and leadership in our industry and his advice and support will be invaluable as we continue to execute our growth strategies."

Odell said: "I am very excited to work with Ronald and Barry at this transformational moment for our industry. It's an absolute honour to be asked by Ronald to provide advice, and since spending time with Barry I've come to recognise we share common values and beliefs about how to build great businesses, which I'm looking forward to delivering with him."

12 August

When NetEnt CCO Anna Rombolio will join Svenska Spel as Business Area Manager for the Tur lottery division

€500m



Pragmatic Solutions' annual gross gaming revenue, according to its Business Development Director Mark Woollard (\$556m)

6 years

The length of the contract extension signed between Betway and West Ham United



TENNESSEE MAKES SPORTS BETTING HISTORY

Tennessee Governor Bill Lee has legalised sports betting within the Volunteer State, despite repeatedly expressing his opposition to gambling.

The Tennessee Sports Gaming Act has been written into law without the Governor's signature, as Lee did not block or oppose it.

Uniquely, Tennessee will offer online-only sports betting, becoming the first state to do so, as it contains no land-based casinos. Sportsbooks can go online as of 1 July, with the new American football season kicking off two months later.

However, Tennessee has become the first state legally requiring operators to purchase official league data to settle in-play wagers, rather than leaving such deals to be negotiated privately.

The new legislation also allows sports leagues to restrict types of available wagers. License fees will be \$750,000 per year – not just a one-off fee – with a tax rate set at 20% of gross gaming revenue.

The approach is the polar opposite to the state of Louisiana, which has shelved its sports betting proposals indefinitely, following new amendments including the same mandatory requirement to purchase official league data.

In making history, Tennessee has certainly caught the eye of the gaming industry, not least Better Collective CEO Jesper Søgaard, who offered his take on the state's "interesting approach."

Søgaard said: "It is really interesting to see the approach by Tennessee to only open up for online and mobile betting. Tennessee is one of the few states to not actually have any bricks-and-mortar operations within its borders.

"To see the state's interest in opening up via the online option illustrates that more states could move towards legislation based on the results they are seeing from others, rather than relying on their own land-based experience."



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THIS WEEK'S WINNERS AND LOSERS

WINNERS

Pennsylvania – began live testing online sports betting with SugarHouse Sportsbook

FanDuel – has signed a streaming partnership with FuboTV

Macau lawmakers – are pushing for improved facial recognition cameras at the island's casinos

Louisiana sports betting – will not happen this year after a House Appropriations Committee voted against advancing a heavily-amended version of bill SB 153

MGM Springfield – was hit with a \$100,000 fine for allowing minors on the gambling floor

LOSERS

SVENSKA SPEL CEO URGES INDUSTRY CO-OPERATION

Transitioning out of a monopolised market, Svenska Spel has seen revenue drop 6% year-on-year for Q1 to SEK 2.05bn (\$197.4m).

The move has of course provided challenges for the state-owned operator, which has expanded its services and faced an influx of competition. Patrik Hofbauer, Svenska Spel CEO, spoke exclusively to *Gambling Insider* to outline some of the difficulties faced in this process.

He said: "The biggest change and challenge for Svenska Spel was preparing for the transition: to adjust the company to the new regulation and licensing system, still as a group, but with three separate business areas.

"After the transition, it has been a challenge to launch new products in segments where our competitors have been present for a very long time. But, business wise, it is positive we now can offer

our customers products like online casino and horseracing, and also more competitive pricing, all within the business area of sport and casino."

While these changes represent shifts for the business, the CEO singled out another hurdle as Svenska Spel's major difficulty. It is an issue growing across gambling markets with companies striving to find the best way to handle it.

He added: "However, the biggest challenge is not due to regulation. It is that an increasing number of people have a negative attitude to the industry. We all have to cooperate on this issue to achieve change."

Hofbauer was speaking to *Gambling Insider* for an in-depth look at monopoly-structured markets for the July/August edition of the magazine.

Register here to read the article
in full when published



THE WEEK IN QUOTES

"The families from 'Gambling With Lives' who have lost sons to gambling-related suicide feel industry reluctance to acknowledge the severity of harm is an insult to the memory of their loved ones."

Charles Richie from charity Gambling With Lives responds exclusively to Gambling Insider after Richard Flint's recent assertion the industry could do more to help problem gamblers

"More and more Colombian bettors are becoming accustomed to new betting markets and alternatives to the national past-time, which we expect to continue seeing a growing interest in."

Ruben Loeches, CMO of R Franco Group, talks to Gambling Insider about the supplier's experience in the Colombian online gaming market

"Play'n Go does things really well but my role is to take all the knowledge I have to help them make it better. Rather than "this is who we are, these are our boat parties," it's all about focusing on what a company truly has."

Play'n Go Communications Manager Thomas Mahoney tells Gambling Insider what changes he will implement for the company

SPANISH POLICE ARREST LEADING FIGURES FROM SPAIN'S TOP TWO FOOTBALL LEAGUES

Spanish police have arrested a total of 11 football players, presidents and directors, reportedly from the country's top two leagues, for alleged involvement in match-fixing.

Among those who have been arrested are both current and former players.

Complaints were first brought to the police's attention about possible match fixing in a La Liga fixture which took place in May 2018.

The Spanish league says the match-fixing was possibly conducted by "an organised criminal group."

Since those complaints, La Liga has reported eight more possible match-fixing cases to the Spanish authorities.

Police said bets were made on the result of certain fixtures, as well as the number of corners awarded.

A lawyer for Huesca, which will play in the Segunda Division next season, confirmed various people at the club had been arrested.

La Liga team Real Valladolid

announced it was one of the clubs which had received a complaint.

A statement from the club read: "Real Valladolid rejects any type of conduct or fraudulent behaviour, denouncing corruption among individuals, money laundering, criminal organisations or any type of behaviour that originates or could lead to the distortion and corruption of any sports competition."

A La Liga spokesperson said: "During the 2018/19 season, La Liga has filed eight complaints with the General Commissioner of the judicial police for alleged acts related to match-fixing in lower divisions of Spanish football and international friendlies played in Spain.

"This police operation demonstrates the effectiveness of integrity protection systems implemented by La Liga to protect the cleanliness of all competitions in Spanish football."

The police have stated the investigation is ongoing.



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| PROPERTY | REVENUE (\$M) | CHANGE (%) |
|--------------------------|------------------|--------------|
| Nevada | \$936.479 | -1.81 |
| Las Vegas Strip | \$481.855 | -3.53 |
| Clark County | \$808.648 | -2.02 |
| Downtown LV | \$61.775 | +2.13 |
| North LV | \$27.129 | -0.46 |
| Laughlin | \$45.392 | -2.67 |
| Boulder Strip | \$78.186 | -0.24 |
| Mesquite | \$12.232 | +4.00 |
| BALANCE OF COUNTY | \$102.079 | +0.76 |
| Washoe County | \$65.870 | +0.98 |
| Reno | \$48.971 | +3.21 |
| Sparks | \$10.614 | -3.27 |
| North Lake Tahoe | \$1.300 | -16.13 |
| BALANCE OF COUNTY | \$4.986 | -5.26 |
| South Lake Tahoe | \$13.064 | -12.54 |
| Elko County | \$25.363 | -0.08 |
| Wendover | \$16.575 | +0.69 |
| BALANCE OF COUNTY | \$8.788 | -1.51 |
| Carson Valley Area | \$9.024 | -0.06 |
| Other areas | \$14.509 | +4.86 |

NV SLIPS AGAIN

Nevada gaming revenue continued to slide in April, as the state was down 1.8% year-on-year and the Las Vegas Strip fell 3.53%.

It was the fourth straight month of declines for the state and Strip.

Strip results suffered from a 20.39% decline in blackjack play, resulting in a 16.36% decline in blackjack revenue.

That offset baccarat revenue, which grew for the first time since November.

Some positives were downtown, which rose 2.13%, the Las Vegas locals, which eked out a 0.22% increase, and Reno, which grew 3.21%.

Downtown and the locals both rose for the third straight month.

COMPONENTS OF STRIP PERFORMANCE

| TABLE DROP | 2019 | 2018 | CHANGE (%) |
|--------------------|------------------------|------------------------|--------------|
| Blackjack | \$449.384 | \$564.501 | -20.39 |
| Baccarat | \$621.369 | \$532.189 | +16.76 |
| TOTAL GAMES | \$1.625 billion | \$1.637 billion | -0.73 |

| MAJOR STRIP SEGMENTS | REVENUE (M) | CHANGE (%) | WIN PERCENTAGE | |
|----------------------|-------------|------------|------------------|--------------|
| | | | 2019 | 2018 |
| Blackjack | \$60.532 | -16.36 | 13.47 | 12.82 |
| Baccarat | \$66.735 | +5.55 | 10.74 | 11.88 |
| TOTAL GAMES | | | \$206.967 | -8.16 |
| Slots | \$274.889 | +0.27 | 8.27 | 8.3 |

GUEST COLUMNIST



FABIO MASSIMO MOLINARI
COMMERCIAL DIRECTOR,
VERMANTIA

Molinari examines the upcoming renaissance in the Italian horseracing betting market

Thanks to the recent announcement from Italy's Customs and Monopolies (Agenzia delle Dogane e dei Monopoli), Italian horseracing fans are set for an exciting summer.

For many years, the country's regulator has enforced protectionist policies to safeguard revenue around its own racing. Strict rules have ensured a focus on a schedule of Italian events and a limited number of international ones via the national horseracing programme, Palinsesto Nazionale. But these are set to be relaxed in July for the first time in the nation's history, with no restrictions on screening content from abroad.

This will transform the way Italian bettors engage with global horseracing. While previously, any international racing event broadcast by Italian bookmakers would have to conform to the time slots established by the Palinsesto Complementare, customers will soon be able to enjoy the best of live racing from around the world at any time of day – from Santa Anita in California to Ellerslie in New Zealand – with every race track in between.

Not only is this excellent news for the consumer who wishes to bet on racing from around the world, it also offers a world of opportunity for sportsbooks themselves.

The ability to expand their offering beyond the traditional fixtures could be a major boost for customer acquisition and retention. It is also especially timely, given the Italian government's ban on advertising by gaming companies coming into force on 14 July. Any restrictions on promotion can now be mitigated by the expansion of content acting as a marketing tool in its own right. As we have seen in other markets, live racing data and pictures from across the world's racetracks adds excitement and offers a new betting experience.

When an operator puts a television on the wall of its shops, it's already crossed over into the world of entertainment. Alongside this, the ability to now offer the world's daily racing events on

tap as part of this entertainment, complemented with bespoke data and content, will present an entirely new betting experience; the likes of which the Italian betting market is yet to see.

At Vermantia, we're now rolling that out with the launch of the A-TV channel, Italy's first national horseracing channel with a global racing proposition. It will deliver more than 85,000 premium live racing events annually from the best tracks in the world, including the UK, Australia, New Zealand, South Africa, India and the US. The whole offering is customised to each operator's requirements, from bet markets to scheduling, graphics and layout – ensuring no two services will look or feel the same.

The next challenge for Italian bookmakers will be to capitalise on this opportunity. With a wealth of data and content at their fingertips, they must now present it in a way that entices the consumer to try it out. We can speak about this from both our experience in the Italian market, having already had great success supplying the biggest Italian betting operators, and our long-standing experience providing live horseracing internationally.

We appreciate there are local requirements, so we localise the service by customising the design and content as well as offering an adaptive data feed for faster deployment. We additionally provide professional live commentary and race cards in the Italian language.

Put together, the Italian market is about to play host to a wealth of new betting opportunities, offering an entirely new world of entertainment for its customers. The real sweet spot for customer engagement, whether in retail or online, is good quality data, readily available betting markets and live pictures.

How operators capitalise on this, as well as manage this new wealth of content to ensure they capture the attention of their customers is up to them. Done right, this will ensure a welcome boost to the Italian market.

“When an operator puts a television on the wall of its shops, it's already crossed over into the world of entertainment”

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