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WEEK 42

FRIDAY 18 OCT 2019

GLOBAL GAMING AWARDS
LAS VEGAS 2019: RESULTS
ARE REVEALED





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THIS WEEK

- **Red Tiger CEO speaks exclusively to *GI* about NetEnt merger**
- **Allegations of money laundering at Crown Casino**
- **Gambling companies stopped from sponsoring London Stadium**
- **Sportradar acquires Optima**

GUEST COLUMNIST:

- **Mike Darley, CEO, Next Gaming**

WEEK 42

FRIDAY 18 OCT 2019

GLOBAL GAMING AWARDS LAS VEGAS 2019: RESULTS ARE REVEALED



The winners at the sixth annual Global Gaming Awards Las Vegas have been revealed, with the ceremony proving arguably the most competitive yet.

This year's Awards at the Sands Expo Convention Center were attended by over 500 industry professionals. The winners were decided by a record panel of 100 expert Judges and independently adjudicated by KPMG Isle of Man.

Overleaf is a full breakdown of the winning candidates in all 12 categories.

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GLOBAL GAMING AWARDS WINNERS 2019



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LAND-BASED OPERATOR

WINNER

ELDORADO RESORTS

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In June, Eldorado Resorts entered new realms within the gaming industry with the announcement of its \$17.3bn acquisition of Caesars Entertainment, which is due to be completed in Q1 2020.



DIGITAL OPERATOR

WINNER

DRAFTKINGS

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DraftKings managed to beat competition from the likes of FanDuel, 888 Holdings and Resorts Digital. The operator opened its sportsbook at Resorts Casino in Atlantic City in November 2018, which was its first physical location in New Jersey.



LAND-BASED PRODUCT

WINNER

INTERBLOCK GAMING - STADIUM

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Interblock won its first ever Global Gaming Award with Stadium. The product connects the live interaction of a dealer with an unlimited number of players. Interblock currently has more than 100 Stadiums operating across four continents.



DIGITAL PRODUCT

WINNER

SCIENTIFIC GAMES – OPENSPO RTS

Scientific Games defended its title in this category, after winning with OpenBet last year. OpenSports, the redesigned sports betting portfolio, combines proven elements of the platform with streamlined services that stage operators for short and long-term success.



LAND-BASED INDUSTRY SUPPLIER

WINNER

ARISTOCRAT

Aristocrat's first success of the day came in this category. In the past year before being nominated, Aristocrat released the EDGE X and Helix XT cabinets. Aristocrat has grown to nearly 5,000 employees, serving thousands of customers.



DIGITAL INDUSTRY SUPPLIER

WINNER

KAMBI

Kambi is celebrating success just one year after its launch in the US, following the overturning of PASPA. Kambi customers include DraftKings, Mohegan Sun, Rush Street Interactive and 888.



CUSTOMER LOYALTY PROGRAM

WINNER

MGM RESORTS INTERNATIONAL – M LIFE

M life is back at the top, after losing its title to Caesars Entertainment last year. M life was the winner in each of the previous four years. MGM guests can earn Tier Credits for virtually all their spending to elevate and enhance their experience.



PROPERTY

WINNER

THE VENETIAN MACAO

The Venetian Macao is the second winner of this Award, after Borgata's success last year. Not only does the Venetian Macao boast the largest casino floor in the world, it stands as the third-largest building in the world and is the largest single structure hotel building in Asia.





PRODUCT INNOVATION

WINNER

INCREDIBLE TECHNOLOGIES - INFINITY V55 EDGE

The Infinity V55 Edge debuted at last year's G2E and is driven by the need to create a unified gaming and product merchandising package. It defeated an intense list of competitors, making it a worthy winner.



SLOT

WINNER

ARISTOCRAT – BUFFALO DIAMOND

It's two wins out of two in this category for Aristocrat, after winning with Game of Thrones last year. Buffalo Diamond honours the original game. It has a \$500,000 wide area progressive and is the first game in the Buffalo franchise to appear on the flame 55 cabinet.



RESPONSIBLE BUSINESS

WINNER

GAMING LABORATORIES INTERNATIONAL

Gaming Laboratories International (GLI) was another first-time winner. GLI will review an operator's existing responsible gambling programs, personnel, resources and performance metrics.



AMERICAN EXECUTIVE

WINNER

DAVID LOPEZ – AGS

The AGS CEO came out on top against 19 other shortlisted executives. Lopez has been CEO of the supplier since 2014 and has overseen sustained growth, including the acquisitions of Colossal Gaming and Cadillac Jack.



THIS WEEK IN NUMBERS

\$4.25bn

The value of the Bellagio's real estate, to be purchased by a joint venture between Blackstone Real Estate Income Trust and MGM Resorts International

8%

The year-on-year increase in Rank Group's Q1 revenue for the 2019/20 financial year



San Manuel Band of Mission Indians will commence its partnership with Allegiant Stadium and the Las Vegas Raiders in the 2020 season

2020

The revenue generated in Iowa through sports betting for September, an increase of 127% from August

\$5m



\$35m



The total handle generated at Indiana's sportsbooks for September, its first month of taking sports wagers

\$224.5m

New Jersey's casino revenue for September, down 3% year-on-year



RED TIGER CEO: OPERATOR MERGERS WILL CAUSE MORE SUPPLIER CONSOLIDATION

As the ink begins to dry on the £197m (\$247.5m) deal signed by NetEnt and Red Tiger Gaming, *Gambling Insider* exclusively caught up with Red Tiger CEO Gavin Hamilton.

How long were negotiations in the pipeline and were there any difficulties or points of disagreement?

It was quite smooth, to be honest. Start to finish, it was a couple of months and there were no real surprises; we found them very professional. That was part of the reason we felt very comfortable with the transaction in the first place. There was just a good chemistry between our team and their management team. There was a willingness to get it done. Part of that helped reinforce the appetite to do it.

How beneficial is NetEnt's push into the US for your firm?

Obviously, it's a very exciting market and it's a chance for us because it's a relatively green field from an online perspective. I don't think we would have been able to

dream of, operationally, thinking about US market entry pre-transaction. So this is one of the big benefits to us.

We are setting ourselves some ambitious goals; but obviously it is a heavily regulated market, so we need to make sure we have dotted all the i's and crossed the t's from a regulatory perspective. It's very high on our priority list and the US is something we're very excited by.

Was this kind of M & A always the plan for Red Tiger?

This deal just makes sense. I think we'll look back on this as a very timely move on both our parts. Before, the Paddy Power – Betfair deal looked big. Picturing a deal which combined those two brands with Sky Bet and PokerStars was just unimaginable. So while this seems like a meaningful deal, we look forward to a couple of years' time, when we'll say that was the start of a whole host of changes on the supplier side. The best thing we did was get ahead of that change.

WHISTLEBLOWERS CLAIM CROWN CASINO IS USED FOR MONEY LAUNDERING

CCTV footage from Melbourne's Crown Casino shows more than AU\$100,000 (US\$67,665) being exchanged for high-value casino chips in an alleged incident of money laundering.

The video, leaked to independent Australian MP Andrew Wilkie and uploaded to his Youtube account, is filmed inside one of the Suncity junket rooms at Crown.

It shows an unknown man pulling stacks of AU\$50 and AU\$100 notes from a freezer shopping bag and speaking with friends and casino staff while they are exchanged for chips.

The camera also pans around the room to reveal similar transactions taking place and zooms in to show money and chips on the counter.

The footage was handed to Wilkie, who has called for a royal commission into the casino, by three Victorian state gambling inspectors.

The whistleblowers highlighted the reduction in police presence inside the

casino as a reason for the alleged rise of money laundering.

Wilkie said: "For many years, we've been told of shocking crimes occurring at Crown and now we have new footage that supports these claims.

"The inspectors who have provided these videos say countless millions of dollars are regularly laundered inside Crown. Crown can no longer claim this isn't happening. This leaked version was filmed using Crown's own security cameras."

Wilkie also described an interview with a Crown limousine driver, who claimed high rollers are flown into Australia on private jets, bypassing customs checks and driven straight to the casino.

The driver claims the casino is willing to cover up illegal activity because it is good for business.

Crown's Suncity room faced closure by the Victorian Commission for Gaming and Liquor Regulations in 2017, for alleged ties to organised crime, but was never shut.

THE WEEK IN QUOTES

"If you look at ICE or SIGMA, I see people are still focusing on making a cool product. No one is really targeting this 68% - the ones who want real attention. You can't say you give them real attention by sending them spam emails or text messages."

Mikael Hansson, Co-founder of Interactive, talks to Gambling Insider about giving players more recognition

"First we conduct some market research; we need to find out what is the expectation of the players in this market. What kind of games do they like to play? Then we look to see if we have similar games and if these games are able to compete in the market or if we need to modify them."

Casino Technology CEO, President and Founder Milo Borissov explains the process of creating new games to Gambling Insider

"If there is something you need guidance on in the new regulation, it's important the regulator gives the operator that information and not just refers them to a legal text."

Betsson Group CEO Jesper Svensson discusses the Swedish Gambling Authority with Gambling Insider

GAMBLING, TOBACCO AND ALCOHOL COMPANIES NOT ALLOWED TO SPONSOR LONDON STADIUM

Reports have surfaced that gambling, tobacco and alcohol companies will not be able to sponsor the London Stadium, with the London Legacy Development Corporation (LLDC) deeming it "inappropriate" for the stadium's image.

Vodafone pulled out of a £20m (\$25.5m) six-year naming rights deal in 2017 and the stadium has remained unsponsored ever since.

The London Stadium lost £25.5m in the year leading up to March 31 2019 and the LLDC has predicted these losses will worsen in the next financial year, potentially rising to £29.1m.

After the news broke, the *Gambling Insider* editorial team explored whether this would be the right decision for the London Stadium.

Matthew Enderby: "The public perception of gambling is far from positive at the moment, so I of course understand the logic behind the decision. But is this a genuine attempt to protect those who visit the stadium from the potential harms of the gambling world? No, it is another PR stunt to get on board with the current anti-gambling rhetoric."

Nathan Joyes: "You only have to travel to north London to see how a football club has been able to increase its income significantly with a non-controversial partnership. Arsenal's long-term deal with Emirates Airline is a prime example of how a football club can be successful away from the sphere of gambling."

Tim Poole: "Unlike alcohol and tobacco, gambling products can be inherently linked to the products offered by the London Stadium itself. Casting gambling firms aside reduces both potential tax revenue and the price the eventual sponsor will pay. It's just bad economics."

Owain Flanders: "Gambling sponsorships may be able to provide a greater income than other industries, but the owners' main priority is protecting the image of a stadium which remains a symbol of a great event in London's history. Unfortunately, gambling still has negative connotations for a significant section of the UK population."

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THIS WEEK'S
 WINNERS AND LOSERS

WINNERS

Fox Bet - Announced a multi-year partnership with Major League Baseball

NetEnt - Partnered with Live Fraud Solutions to improve its anti-fraud measures

Wynn Resorts - Confirmed it is pulling its bid for a license to operate in Osaka and will instead focus on the Kanto region

LeoVegas - Was fined €750,000 (\$827,000) by the Dutch regulator for offering illegal online gaming in the Netherlands

Betfred - Was fined £322,000 (\$395,000) by the Gambling Commission for AML failings

LOSERS

SPORTRADAR ACQUIRES OPTIMA TO EXPAND B2B PORTFOLIO

Sportradar has confirmed the acquisition of omni-channel platform business Optima.

The acquisition is effective immediately, although the data supplier has not revealed the price of the deal.

Optima will extend Sportradar's betting services portfolio, making it a full-service B2B data, betting, trading and player management platform business.

The company was founded in 2012 and Sportradar CEO Carsten Koerl believes the M & A puts his firm in "prime position" within the supplier market.

Optima CEO Jacob Lopez said: "Optima joining Sportradar is the next natural step in the achievement of our company vision.

"Sportradar is an organisation I have admired for a very long time and we couldn't be happier to be joining forces with them.

"We are fully committed to a common vision and will work hard to continue ensuring Sportradar also offers the leading platform services for the group."

Gambling Insider spoke exclusively to Sportradar's Managing Director of Managed Trading Services, Paolo Personeni, about why Optima stood out in the eyes of its buyer.

He said: "We did a pretty extensive analysis of what was available on the market. You have a quite significant number of platforms. They're all different in terms of focus; some of them have a regional focus, some of them are more for the global market; some are feature and function-rich and others are more scalable.

"So it has been a mixture of feature-richness and a very robust architecture, which is proven already in terms of performance. The overarching principal has been to identify a platform that has the technical conditions to let us achieve our goal: to become the leading force in the turnkey solutions market. It is also a springboard for innovation, which has always been a characteristic of Sportradar."

NJ RISES

New Jersey gaming revenue grew 7.83% for September, driven by continued strength in online gaming and sports betting.

Atlantic City land-based casinos fell 3.21%, despite higher table hold at most properties this year.

The state's other gambling options, online gaming and sports betting, generated a combined \$79.021m.

Internet gaming hit another record month at \$41.138m,

driven by plus-50% growth from the majority of properties.

Golden Nugget's \$15.644m in digital revenue was only \$578,000 short of its land-based gaming revenue.

Online poker grew 1.8%, rising for the fourth month this year.

Sports betting grew 59.34%, to a record \$37.883m, although there were 11 sports betting operators this year versus nine last year.

Sports betting handle was also a record at \$445.564m.

Online handle was five times that of retail handle.

NJ GAMING TOTAL

MARKET/PROPERTY	REVENUE (M)	% CHANGE
Meadowlands	\$16.933	+134.20
Monmouth Park	\$3.361	+52.17
Ocean	\$24.286	+46.93
Resorts	\$23.981	+24.12
Hard Rock	\$31.873	+19.97
Golden Nugget	\$32.323	+12.73
Borgata (MGM)	\$65.884	-2.52
Harrah's (CZR)	\$26.617	-2.72
Bally's AC (CZR)	\$15.302	-10.81
Tropicana (ERI)	\$28.986	-12.91
Caesars (CZR)	\$23.262	-14.07
NJ Gaming Total	\$303.529	+7.83
Same Store	\$214.881	+4.48

INTERACTIVE

MARKET/PROPERTY	REVENUE (M)	% CHANGE	% SHARE	PARTNER
Hard Rock	\$1.880	+189.70	4.6	GIG
Resorts Digital	\$8.929	+160.34	21.7	SGMS, TSG
Golden Nugget	\$15.644	+68.50	38.0	PPB, GAN, SGMS
Ocean	\$0.517	+59.72	1.3	GAN
Borgata (MGM)	\$6.959	+52.50	16.9	GVC, Pala
Tropicana (ERI)	\$3.263	-2.40	7.9	Gamesys
Caesars (CZR)	\$3.947	-5.12	9.6	888, SGMS
Online Gaming Total	\$41.138	+59.74		
Casino	\$39.499	+63.61		
Poker	\$1.639	+1.80		



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SPORTS BETTING

MARKET/PROPERTY	REVENUE (M)	% CHANGE	PARTNER
Resorts	\$0.340	+262.52	DraftKings
Ocean	\$3.106	+140.41	WMH
Meadowlands	\$16.933	+134.20	FLTR, PBH
Monmouth Park	\$3.361	+52.17	WMH/Rush St
Bally's	\$0.728	+45.53	SGMS/888
Resorts Digital	\$10.721	+26.04	TSG/DraftKings/ Kambi
Borgata	\$1.478	-41.23	GVC
Golden Nugget	\$0.487	-56.42	SBTech/CHDN
Harrah's	\$0.118	-62.00	SGMS
Hard Rock	\$0.409	N/A	GIG
Tropicana	\$0.201	N/A	WMH
Total	\$37.883	+59.34	

LAND-BASED CASINOS

MARKET/PROPERTY	REVENUE (M)	% CHANGE	TABLEHOLD	
			2018	2019
Ocean	\$20.663	+38.56	14.6	9.3
Hard Rock	\$29.584	+14.14	19.8	14.6
Harrah's (CZR)	\$26.498	-2.04	25.1	20.9
Borgata (MGM)	\$57.446	-5.06	16.7	16.4
Resorts	\$14.712	-6.87	13.2	14.3
Golden Nugget	\$16.192	-11.37	17.8	15.4
Bally's AC (CZR)	\$14.573	-12.50	17.9	17.2
Tropicana (ERI)	\$25.523	-14.75	22.1	21.7
Caesars (CZR)	\$19.316	-15.70	9.0	15.5
AC Land-based Total	\$224.507	-3.21		
Same Store	\$174.260	-8.83		
MULTIPLE PROPERTY COMPANIES:				
Caesars (CZR)	\$64.334	-9.10		

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GUEST COLUMNIST



MIKE DARLEY
CEO, NEXT GAMING

Darley asks the market not to dismiss skill-based games

We live in a fast-paced world where our needs must be met immediately and our expectations for consumer satisfaction are measured in moments. Whether justifiably so or not, that's a fact. Maybe, that's part of the challenge skill-based gaming is facing.

The first generation of skill-based slot games were unique and offered the player a completely different experience than a traditional slot machine. They targeted a younger audience that was not enamoured with the slot products offered in casinos. With slot play generally declining, the expectation was the new games would counteract that. Unfortunately, the games did not meet casinos' expectations and the conversations about skill-based slots not being the answer began – and still continue.

Is that really a fair assessment? The number of skill-based games on the market today is much more robust and continues to grow. There are a handful of companies which see the potential and are dedicated to creating exciting, innovative and interactive games that will, in time, be a normal component to casino offerings. GameCo, Gambelit, Next Gaming, Synergy Blue and Competition Interactive are all dedicated to developing skill-based games that resonate with a large audience.

As an example of acceptance, let's take a look at the similarities between Electronic Table Games (ETG) and skill-based slots. ETGs, when first implemented, filled a void in jurisdictions that would not allow live table games. In fact, ETGs are generally classified as slot machines. The level of acceptance was slow to build but grew, as players became accustomed to a new experience.

In fact, players enjoyed the social aspect of these games. Their ability to make choices based on their preferences for different gaming experiences was thereby expanded.

For casinos in jurisdictions that allowed live table games, the product offered reduced costs associated with operating in a 24-7 environment.

While not for everyone (and neither are skill-based slots) the audience expanded and continues to grow. One of the many customer benefits is the ability to play table games without the intimidation factor of playing at a live game. Great: choice is

always good! In fact, this allowed players to build their skills and, for some, venture to the pit with confidence.

What does this indicate for the progress and evolution of skill-based games? First of all, you can't be everything to everybody. Some players will like it, some won't. Some casinos will find their clientele gravitates to the new slot experience, some won't. Some operators will take a wait-and-see attitude, some won't and that's ok.

What it tells us is any new and innovative product takes some time to mature; not only with the refinement of the product but the acceptance of the product. This is certainly evident with ETGs and their popularity continues to grow.

For skill-based slots, you will find the variety of games offered, and unique playing experiences, are rapidly expanding. As previously mentioned, there are a small number of companies determined to lead the slot experience into the future and bound by a common goal: to create something that has never been done before.

Make it entertaining, exciting, immersive and fun. Allow players to be a participant and not an observer of the outcome. Provide a social aspect that can be celebrated with friends. Set goals within your games that offer a sense of achievement. Create games that will attract a variety of demographic segments, which seek a bit of an adrenaline rush and maybe some bragging rights.

Just give it some time. You have some very skilled and talented teams working diligently to break into a new dimension. We are not at the point to entirely dismiss this sector – not even close. Value those brave enough to explore uncharted territory and keep an open mind.

“Make it entertaining, exciting, immersive and fun. Allow players to be a participant and not an observer of the outcome. Provide a social aspect that can be celebrated with friends. Set goals within your games that offer a sense of achievement”

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