



WEEK 20

FRIDAY 15 MAY 2020

**AFFILIATECON VIRTUALLY
LIVE: ROUND-UP & A WORD
FROM THE MODERATOR**

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Chambers USA Guide, 2020

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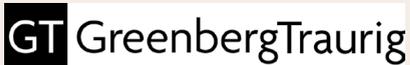
WORLDWIDE LOCATIONS

United States, Asia,
Europe, Middle East,
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THIS WEEK

- **Las Vegas Sands ends Japan IR plans**
- **Slow and steady return for land-based casinos**
- **No professional sport in England until 1 June**
- **Philippines gaming lockdown continues**

GUEST INTERVIEW:

- **Arcangelo Lonoce, head of business development Europe, Habanero**

WEEK 20

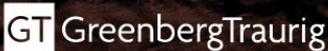
FRIDAY 15 MAY 2020

AFFILIATECON VIRTUALLY LIVE: ROUND-UP & A WORD FROM THE MODERATOR



AffiliateCon made history on Tuesday 12 May, running its first ever virtual event – and it went off without a hitch.

With first-rate analysis from a range of distinguished speakers, AffiliateCon Virtually Live delivered high-quality content across a mix of engaging solo presentations and lively group discussions.



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WORLDWIDE LOCATIONS

United States, Europe, Asia, Middle East, Latin America

THIS WEEK IN NUMBERS

May 19



Date the Confederated Tribes of the Colville Reservation are aiming to reopen three of their properties in Northern Washington

17

Countries the South Korean professional football league was broadcast in after it restarted on 8 May



2,000

Welsh gaming jobs at risk as a result of the COVID-19 pandemic, according to Betting and Gaming Council CEO Michael Dugher

148.2 m

Shares to be sold in Donaco International Ltd, after the Supreme Court of New South Wales lifted a freezing order



RMB10.5bn

Amount earned from the Chinese lottery in March, according to China's Ministry of Finance – a 70% drop year-on-year (\$1.5bn)



Covering topics such as SEO, sports betting, esports, virtual sports, marketing, responsible gambling, regulation, affiliate-operator relations and more, the event offered a variety of insights across all sectors of the gaming industry.

One of numerous highlights was Louise Agran, Spotlight Sports Group CMO, discussing the *Racing Post* halting printing of its newspaper during the coronavirus pandemic.

She said: "That gives you an idea of how strong the effect has been. It's something that's quite unprecedented and not something we wanted to do at all.

"With a lack of UK and Irish racing, it was just not viable or feasible to print something. We didn't have enough relevant content for our audience to put in the paper and enough to justify the price of the paper.

"I think that's an indication of what we've had to do and how we've had to adapt, that we've been really trying to promote wherever there has been racing."

In the final panel of the day, Oddsmedia co-founder Jeton Kodja had a message for operators: "Some operators got into trouble because of their own marketing activities and then sent out several warnings about using the pandemic for advertising.

"In general, I completely agree that such a situation should not be exploited and there is nothing to say against it. But the wording and the threatening language in these kinds of emails is in my eyes unprofessional.

"Operators could have communicated this to affiliates with respect instead of treating everyone like criminals."

Tim Poole – A message from the moderator

For a first-time presenter and moderator at a conference, I could not be happier while I reflect on the success of the inaugural AffiliateCon Virtually Live. I've been to my fair share of shows during my time in the industry, so it was great to be on the other side of the equation.

I'd like to thank our panellists and viewers, the brands who supported the event and the superb work of the AffiliateCon team behind the scenes.

We aimed to deliver first-class content and analysis, not just to engage our audience but to help operators and affiliates during a truly challenging time for many amid the coronavirus pandemic.

From the positive feedback we've received so far, I'm delighted to say we have succeeded in that area.

Content is king and there's no point putting on an event without having anything worthwhile to say.

But all our solo presenters and panel speakers all provided valuable and relevant messages, while at the same time having plenty of encouraging and positive things to say about the industry.

Hopefully, we'll be able to return to Sofia, Bulgaria, for AffiliateCon in May 2021, to meet everyone involved in the event in person and experience the real-time networking we have all so dearly missed in recent months.

Should lockdowns continue across the world, however, we will always be on hand to give you the kind of top-class analysis you cannot get anywhere else.

Once again, a huge thank you to everyone involved and a sincere thank you from me personally, to all who have welcomed me with open arms as the new conference moderator on the block!

You can view the full recording of AffiliateCon Virtually Live on YouTube [here](#). *Gambling Insider* will also provide regular coverage on our website, along with an extensive round-up in next month's *Trafficology*.

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...
y/affiliatecon2020netpeak
... from last year AffiliateCon
... and case studies using PBNs
... getting Netpeak research

Gennadiy Vorobyov, CEO, Netpeak Bulgar

AffiliateCon
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Izhak Ron, Chairman & CEO, Tal Ron Drihem & Co

Stielitz, Co-Founder, Odds1x2 & PlayWise Casino

Matan Amoyal, Boiling Offers, CEO

Saulius Racevicius, ConnectPay, CEO

AffiliateCon
VIRTUALLY LIVE

Warren Jacobs, MD, ActiveWin

Jeton Kodja, Co-Founder, Oddspedia JSC

Tim Poole, Gambling Insider

AffiliateCon
VIRTUALLY LIVE

Tim Poole, Gambling Insider

Alex Donohue, Director, Pressbox

Louise Agran, CMO, Racing Post

Warren Sammut, Seo Marketing Owner, Betsson Group

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The Continued Rise of Virtual Sports

Martin Wachter - CEO, Golden Race

GOLDEN RACE
BEYOND VIRTUALS



affiliatecon.com

Pandemics & The Future: An unprecedented opportunity for eSports

Tom Wade - Co Founder



SICKO

PRAGMATIC PLAY



OUT NOW

3,750

Stores opened by OPAP this week after resuming its retail operations in Greece



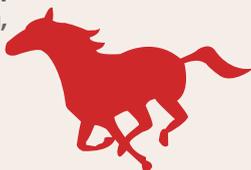
SEK 17m

Amount by which Svenska Spel extended its deal with the Swedish Sports Federation this week



1 June

Potential date for the return of UK horseracing, according to the British Horseracing Authority



LAS VEGAS SANDS WITHDRAWS FROM JAPAN IR PROJECT

Las Vegas Sands has announced it is cancelling plans to obtain a Japanese license and build an integrated resort (IR) in the country.

Previously, Sands was considered a favourite to land a development in Japan. However, the operator has stated the "framework around the development of an IR" is hindering those plans.

The withdrawals might come as a surprise since Sands had targeted Tokyo and Yokohama as potential locations for an integrated resort. But market specialists have expressed a belief that it's unlikely Sands will return to Japan anytime soon.

Analysts stated Sands has always been drawn to Tokyo but now the company is focusing on other opportunities, as Japan's IR licensing has proven too complicated to navigate for the casino operator.

The increasing cost of developing an integrated resort is another point of contention. Last year, the company's president Rob Goldstein stated: "We're going to be in a top-tier city, which

would mandate \$1bn – and that may be light. The cost of building in Japan is a big issue and the way the deals are structured, it's a challenge."

Japan is still dealing with the coronavirus pandemic – as is Sands. Specialists predict that, should the country's economy recover enough, licenses for IR will likely be pushed further back, with the Olympics taking priority. And it's unlikely Sands will return for an IR project unless there's a clear way to win the Tokyo market.

GI Verdict: An expansion into Japan has been a target of Las Vegas Sands since at least 2005, but the terms of the country's casino legislation have proven a stumbling block. So too has the estimated figure of \$10bn it would cost to build a casino in Japan. Given the current climate, and the fact Sands shares had fallen from \$74.06 in mid-January to a low of \$37.68 on 18 March during the COVID-19 pandemic (since recovering to \$44.42), there are more pressing concerns closer to home for Sands to concentrate on.

THE WEEK IN QUOTES

“A lot of people in the UK have been furloughed and are being paid more or less their salary. People are obviously going to gamble more as a result, in addition to buying more online and gaming. We do checks and make sure we deal with it if people become problem gamblers. We have seen an increase in gambling but it's not crazy numbers. We don't want people to blow their cash with us, so we always keep an eye on it.”

Warren Jacobs, ActiveWin MD, speaking about his experiences of UK problem gambling during an AffiliateCon Virtually Live panel

LAND-BASED SECTOR STARTS GRADUAL REOPENING ACROSS THE GLOBE

Casinos and betting shops have gradually started to open worldwide, as coronavirus lockdown measures begin to ease.

SkyCity Entertainment Group announced it will resume operations in three of its casinos in New Zealand, with Australia's venue remaining closed.

The decision came after the New Zealand Government loosened its COVID-19 restrictions, including lifting national state of emergency protocols.

The casinos, which were closed in March, are set to re-open with reduced working hours as Government regulations dictate there should be no more than 100 people present at the same time, which includes both guests and staff.

OPAP has also resumed its retail operations with the opening of betting shops on 11 May after the Greek Government lifted certain measures put in place due to the coronavirus.

On 28 April, Greece prime minister Kyriakos Mitsotakis announced the relaxing of several lockdown measures, with schools and shops reopening.

The Greek operator's 3,750 stores began reopening from 9am on 11 May after being closed since 14 March, while street vendors also resumed the distribution of Hellenic Lotteries' products.

With social distancing still operating in the country, OPAP will adopt a comprehensive set of prevention measures, including a 1.5 metre gap between individuals and encouraging the use of protective masks.

In the US, Arkansas Governor Asa Hutchinson gave the go-ahead for the state's three casinos to resume limited operations on 18 May.

The casinos will operate with one-third of their capacity, while employees must follow safety guidelines.

GI Verdict: The land-based sector starting to open up is the start of a long road to recovery. It must get to grips with the 'new normal,' with heavy social distancing and player entry restrictions likely to be in place for the foreseeable future. By the start of June, more casinos and shops will follow suit, but it's going to be a long time before they can substantially recoup heavy losses.



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"Be open-minded but think about what is going to work. It's important to adapt and adjust your strategy to the current times but don't take advantage of it. People have been taking advantage of the fear to promote their product but that's not the right way to market. You need to understand the needs but market it right with a positive approach. Make your target audience more engaged and want to buy your product for the right reason rather than the wrong reason."

During the Tal Ron All-Stars panel at AffiliateCon Virtually Live, Matan Amoyal, Boiling Offers CEO, had some advice for affiliates

"In the short term I see some affiliates who are going into other verticals. Online gaming people may be going to other verticals but not diversifying into selling furniture on amazon or god knows what. In the long term, the smaller affiliates will suffer very hard from this pandemic and some of them won't stay in the industry. The big-sized companies will focus more on other verticals and enhancing offers."

Assaf Stieglitz, Odds1x2 and PlayWiseCasino co-founder, at AffiliateCon Virtually Live explaining how he thinks the pandemic will affect affiliates

PROFESSIONAL SPORT NOT RETURNING TO ENGLAND UNTIL 1 JUNE

The UK Government has announced no professional sport will take place in England until at least 1 June.

The news comes as part of the Government's guidance on lockdown easing measures set out on Sunday 10 May, which included lifting restrictions on exercise from 13 May, and details on stages two and three of its overall plan.

However, step two is not allowed to start before 1 June, which will permit sporting events to take place behind closed doors and be broadcast, although only if progress has been made in successfully controlling the spread of COVID-19.

Football in England has been suspended since 13 March, with nine rounds of fixtures still to be played in the Premier League; meetings discussing details on Project Restart take place within the next week.

The England and Wales Cricket Board (ECB) had previously announced there will be no cricket played until at least 1 July, while Premiership Rugby is also aiming for a July restart.

The British Horseracing Authority (BHA) is hopeful racing will return on 1 June,

following a commitment from racing's executive committee, which has agreed a timeline on what racing needs to do to meet the resumption date, all of which will be published within the next week.

Sport has gradually been restarting following a worldwide suspension.

Last week, the German Football Association (DFB) announced the German Bundesliga will restart behind closed doors on 16 May, while the K-League in South Korea began its new season last weekend.

GI Verdict: It's no surprise sport in England won't return in May but at least there's an idea of a resumption, with operators paying close attention. The Premier League will hold meetings on a 12 June return, as restricted training resumes, but plenty of challenges remain. However, with the Bundesliga in Germany back this weekend, the world will be watching to see how the action plays out. Its return will be a massive boost to fans and sportsbooks, in the hope of a gradual return for major sport having a knock-on effect in the rest of Europe.

TAKING STOCK

SHARE PRICES COVER THURSDAY
7 MAY TO THURSDAY 14 MAY
(10AM BST)

Las Vegas Sands
44.42 USD



-6%

OPAP
7.74 EUR



-2%

SkyCity Entertainment
2.40 NZD



-2%

Donaco
0.03 AUD



0%

Galaxy Entertainment
51.60 HKD



1%

PHILIPPINES GAMING LOCKDOWN CONTINUES DESPITE NATIONAL EASING

Philippines President Rodrigo Duterte has announced an easing of quarantine measures in some areas, yet other 'high-risk' areas, such as gaming, will remain strictly regulated even after 15 May.

Manila's lockdown, known locally as "enhanced community quarantine" or ECQ, was first announced mid-March and covers its large-scale casino resorts in Entertainment City.

The most recent extension includes plans for a modified quarantine, which will permit factories and public transport to restart under limited capacity.

On Tuesday, the Philippine Department of Health reported the country had recorded 11,350 cases of COVID-19 and 751 deaths and this year's Phil-Asian Gaming Expo (PAGE) has been postponed until 7 to 9 January 2021 as a result.

The decision was made after two other big-name events ASEAN and ICE/SiGMA Manila pushed their dates back as well. The postponements are influenced by the COVID-19 pandemic and its impact on the global economy.

PAGE organisers stated: "At this critical moment of fighting against the coronavirus, we decided to join together more than ever in the current situation."

However, in early May, the Philippines' Amusement and Gaming Corp said it was allowing "partial resumption" of operations for online gambling providers, known as Philippine Offshore Gaming Operators (POGO), with an aim to help the Government "raise necessary funds" to combat the coronavirus.

GI Verdict: The Philippine Government's decision to allow the resumption of POGO activities is an interesting one, particularly considering the amount of pressure it received from the Chinese Government to instigate a ban last year.

The Chinese Government may be unhappy with the decision given the number of its citizens who initially made use of these sites illegally.

For the Philippines' land-based sector, it's simply a case of remaining patient, with there being no alternative.

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NJ ONLINE GAMING BOOMS

Online gaming in New Jersey boomed in April as land-based casinos were closed, with revenue more than double last year's, at a record \$79.96m.

In fact, a majority of online casinos doubled last year's revenue.

Revenue generation was led by long-time revenue generation leader Golden Nugget, while growth was led by Ocean at more than triple last year.

Online poker tripled to a record \$5.148m.

Sports betting fell hard due to a lack of sporting events to bet on. However, Borgata managed to grow revenue as the property only operated retail betting last year.

INTERACTIVE

MARKET/PROPERTY	REVENUE (M)	% CHANGE	SHARE %	PARTNER
Ocean	\$1.131	+266.76	1.4	GAN
Borgata (MGM)	\$15.868	+190.46	19.8	GVC, Pala
Hard Rock	\$4.484	+188.37	5.6	Gaming Innovation
Resorts Digital	\$16.119	+125.84	20.2	SGMS, FLTR
Golden Nugget	\$27.643	+99.52	34.6	PPB, GAN, SGMS
Caesars (CZR)	\$8.728	+90.60	10.9	888, SGMS
Tropicana (ERI)	\$5.987	+62.45	7.5	Gamesys
iGaming Total	\$79.960	+118.57	N/A	N/A
Poker	\$5.148	+208.66	N/A	N/A
Casino	\$74.811	+114.27	N/A	N/A

SPORTS BETTING

MARKET/PROPERTY	REVENUE (M)	% CHANGE	PARTNER
Borgata	\$0.078	+216.95	GVC
Hard Rock	\$0.044	-66.43	GiG
Meadowlands	\$1.629	-86.55	FLTR, PBH
Resorts Digital	\$0.604	-87.32	FLTR/DraftKings/Kambi
Ocean	\$0.087	-89.62	WMH
Monmouth Park	\$0.182	-92.87	WMH/Rush St
Bally's	\$0.020	-94.28	SGMS/888
Harrah's	\$0.000	-100.00	SGMS
Resorts	\$0.000	-100.00	DraftKings
Tropicana	-\$0.002	-102.49	WMH
Golden Nugget	-\$0.009	-123.20	SBTech/CHDN
Sports Betting Total	\$2.634	-87.58	N/A

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GUEST INTERVIEW



ARCANGELO LONOCE
HEAD OF BUSINESS
DEVELOPMENT – EUROPE
FOR HABANERO

Lonoce speaks to Gambling Insider about the supplier's European accomplishments and plans for Spanish expansion

Tell us about your experience in the gaming industry; how did you find yourself with Habanero?

The journey started in 2003 and, having worked in gaming ever since, I consider myself something of a veteran. My first professional experience in the industry was working at a call centre for a large company, where I progressed to the role of VIP host.

Following a brief stint in CRM, I then started a product management job in 2011 at Winga (now LeoVegas in Italy). The Italian market was still in its infancy, so it was a tremendously exciting period. In 2012, I began a six-year product management tenure at BetVictor. It was there I discovered Habanero.

I was first struck by the company's world-class games catalogue. I also had the pleasure of meeting Habanero's talented team in the run-up to an integration deal. Overseeing the launch, I witnessed the impressive performance of Habanero's games first-hand.

For that reason, I was thrilled to hear that the company was looking for someone to manage their European transition. I jumped at the opportunity and began my journey with Habanero. Two years on, I remain every bit as excited about our ambitious commercial plans.

How successful has this transition into Europe been since you joined the company?

It's been a huge success, but that wasn't a surprise. Indeed, one of the reasons I was so eager to join Habanero was the company's phenomenal European potential. Spearheading our campaign on the continent was an experience I consider a great privilege.

The success of the BetVictor integration told me everything I needed to know about Habanero's remarkable quality.

Our primary focus was on Italy, the continent's second-largest online market.

Debuting in Italy proved a prudent strategic move and two years later we've signed 10 partnerships and counting with some of the country's best-known operators.

This impressive performance subsequently saw us go from strength to strength elsewhere in Europe, with an MGA B2B licence expected to follow shortly on from our recent certification in the Scandinavian markets.

With a global expansion strategy in place, exciting times lie ahead.

I understand you're looking to expand into the Spanish market very soon. What is it that makes this market so desirable?

We are not yet live in Spain, so I can't give the exact details of our commercial performance there. However, the feedback we have received from operator partners consistently points to rapid growth for the Spanish market. From a cultural perspective, Spain's gambling community is not radically different from Italy's. Judging by the success we've enjoyed in Italy, we feel very excited about this market.

What is the primary focus for the rest of 2020?

We started 2020 with the objective of strengthening our presence in the 14 European markets where we currently operate, as well as undertaking a big growth push in Malta when our MGA license is approved.

The past year has also seen us expand into LatAm. After hiring a new team member with a wealth of experience on the continent, we've signed a string of key commercial agreements there. Habanero has also announced its LatAm presence at a range of major regional trade shows, and we remain excited by the territory's promising commercial opportunities.

LatAm markets are regulating rapidly and its audiences are becoming more and more enthusiastic about online gaming. The onset of COVID-19 will accelerate this process further, so the online betting vertical is likely to continue growing.

Our customer service team is also set to expand in the coming period, with dedicated staff on-hand for European clients and a revamped selection of back-office management and marketing tools.

With a further succession of immersive games also in the pipeline, we're gearing up for a busy few months.

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