



WEEK 33

FRIDAY 14 AUG 2020

MGM RESORTS SHARES SOAR AFTER \$1BN IAC INVESTMENT

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THIS WEEK

- Strong growth reported by online companies
- Land-based businesses suffer the reverse
- Study shows casino impact in different gaming regions
- GGA: Continent 8 to sponsor exec category

MOBILE vs DESKTOP SPECIAL:

- Martin Stalros, COO, Relax Gaming
- Ben McDonagh, CEO, Green Jade Games

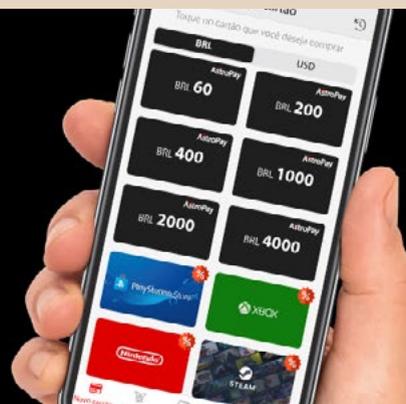


InterActiveCorp (IAC) has announced the purchase of a 12% stake in MGM Resorts International, for an approximate cost of \$1bn.

The media and technology company is led by Barry Diller and has been welcomed as a significant investor by those at MGM Resorts.

The operator’s potential for digitalisation, with its joint partnership with GVC Holdings (Roar Digital) expanding on the US sports betting scene, was a key part of what attracted IAC.

GLOBAL PAYMENT SOLUTION



THIS WEEK IN NUMBERS

11%



GVC Group' Q2 2020 revenue fall year-on-year, to £1.58bn (\$2.07bn)

10



Years PointsBet has signed a primary skin agreement for with Twin River in New Jersey

CAD 10m

Cash sum agreed for the sale of Century Casino Calgary operations to 2267166 Alberta Ltd (\$7.5m)

99%



Percentage drop in Genting Singapore's Q2 gaming revenue, to S\$6.5m (US\$4.7m)

-\$10.4m



Caesars Entertainment's adjusted EBITDA for Q2, a significant drop from positive \$164.8m in Q2 2019

MGM Resorts CEO and President Bill Hornbuckle said: "IAC's expertise in growing and expanding brands online is a natural fit for our focus on enhancing the resort experience through curated and personalised offerings, as well as digital enhancements in sports betting and online gaming.

"We appreciate that they share our long-term strategic vision for growth and maximising value for our shareholders. We welcome their collaboration and are excited at the possibilities it will bring."

With MGM Resorts shares closing last Friday at \$19.03, stocks were up 14%, to as high as \$21.81, after the announcement.

IAC explained its reasons for the MGM investment in a letter to shareholders published on its website.

The letter first explained why shareholders may be confused by the decision. Reasons included the unusual nature of the investment in relation to IAC's previous investment history and the standard type of securities purchased.

However, the letter continued by explaining the benefits of the MGM investment, which it insisted presented a "once in a decade opportunity for IAC".

From Mid-March, MGM Resorts has been affected by casino closures as a result of the COVID-19 pandemic. Despite this, IAC made clear it believes the casino operator can "make it to the other side competitively stronger".

In addition, the letter explained why MGM Resorts' online business was a main driver behind the investment. IAC outlined a desire to invest in US online gaming, and described MGM Resorts as an "iconic brand" with access to several states.

Diller, chairman and senior executive of IAC, said: "What initially attracted us to MGM, besides its leadership in leisure, hospitality and gaming, was an area that currently comprises a tiny portion of its revenue – online gaming.

"IAC's foundational concept of seeking opportunities to build interactive businesses is our base rationale. There is a digital-first opportunity within MGM Resorts' already impressive offline businesses, and with our experience, we hope we can strongly contribute to the growth of online gaming."

In July 2020, IAC completed its full separation from Match Group, something Diller described as "the largest transaction at the core of IAC's strategy". According to Diller, this allowed IAC to emerge as a new smaller company with \$3.9bn of cash and no debt. This allowed the company to make the investment.

GI Verdict: Considering MGM Resorts' financial results so far this year, it could be considered surprising that such a large investment would be attractive to IAC.

The casino operator saw net revenue decrease 91% year-on-year for Q2, at \$290m, in addition to operating loss of \$1bn compared to income of \$371m in 2019. But, of course, the COVID-19 crisis has seen all US land-based casino operators struggle to some degree.

In terms of online investment, MGM Resorts is certainly an attractive prospect. Since its launch in 2018 in partnership with GVC Holdings, BetMGM has made significant progress, with aims to be active in 11 states by the end of 2020.

Both partners also recently confirmed a second round of investment in the sports betting and online casino platform, increasing their financial input to \$450m and demonstrating a serious commitment to its development.

In the race for domination of the US online gaming sector, MGM Resorts could definitely be a good bet.

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25%

Increase in Japan-based supplier Universal Entertainment's net sales for H1 2020

-\$7.6m

Operating loss for Full House Resorts for H1 2020, a drop from profit of \$3.2m earned in H1 2019

4

Oklahoma tribes that have filed a lawsuit requesting a federal court to void gaming compacts between the state and two other tribes



ONLINE GROWTH SEES GIG AND GAMESYS POST STRONG REVENUE RISES

Gaming Innovation Group (GiG) has reported a 47% year-on-year rise in revenue for Q2, with gross profit also increasing during the quarter.

Revenue for the three months to 30 June increased to €16.7m (\$19.7m), which also represented a 49% quarter-on-quarter rise, despite the coronavirus pandemic dominating the period.

Gross profit rose 43% from the same period last year, up to €15.9m, while Q2 EBITDA increased 93% to €2.8m.

In terms of H1 2020, revenue increased 18% from 2019 to €27.8m, while gross profit rose 15% up to €26.6m. However, EBITDA decreased from €3.8m, down to €3.4m.

Revenue from the supplier's media services remained at €8.6m for the quarter, despite a lack of live sport, with the supplier's performance in live casino allowing it to switch paid media over to the vertical.

Meanwhile, Gamesys Group reported a pro forma revenue rise of 27% for H1, seeing a 101% reported change up to £340m (\$444.9m).

The reason behind its reported change is the company's acquisition of JPY for £490m in

September. But its pro forma rise shows all brands would have experienced financial increases in any case.

Adjusted EBITDA was also up 75% to £95m and adjusted net income up 68% to £68.1m.

GI Verdict: The results, particularly for Gamesys Group, demonstrate the growth of online gaming during the coronavirus pandemic, with online-only companies such as Evolution Gaming and Betsson Group also posting significant rises.

Companies with strong retail arms, such as William Hill and GVC Holdings, have reported mixed results, while those dealing predominantly in retail and land-based gaming have generally announced considerable declines, as can be seen in our next story overleaf.

The rise in online casino play during the pandemic allowed GiG to offset losses made by the two-month suspension of major live sport in March. These results show the benefits of diversity, especially in the current climate, as opposed to relying on one particular vertical.

THE WEEK IN QUOTES

“The lack of regulatory consistency jeopardises online players’ safety, as it exposes them to the unregulated and unsafe websites of the black market, which profits to the detriment of the European economy. EGBA advocates sector-specific EU regulation for consumer and minor protection. There are simple rules that can be proposed, to ensure that online players, minors and players who are at risk are equally protected.”

The European Gaming and Betting Association (EGBA) explains the reasoning behind its proposition of a specific set of consumer rights for the online gambling sector

CORONAVIRUS: TWIN RIVER AND CAESARS ENTERTAINMENT POST SIGNIFICANT REVENUE DROPS FOR Q2

Several top-tier casino operators and suppliers have reported significant revenue declines as a result of venues being closed due to the coronavirus pandemic.

Twin River posted revenue of \$28.9m for Q2 2020, a drop of 80% year-on-year.

The casino operator recorded an operating loss of \$23.5m for the period, a significant drop from profit of \$17.2m generated in 2019.

The casino operator has suffered from property closures since mid-March as a result of the COVID-19 pandemic. Now, the operator has been permitted to reopen all nine of its US properties.

Caesars Entertainment, formerly Eldorado Resorts, reported a yearly revenue drop of 78% for Q2, as well as posting a significant net loss for the quarter.

In the first financial update since Eldorado Resorts completed its \$17.3bn acquisition of Caesars Entertainment on 20 July, net revenue for the legacy Eldorado properties decreased to \$126.5m, on a same-store basis compared to last year.

The impact of the coronavirus pandemic saw adjusted EBITDA tumble from positive

\$164.8m in 2019, to negative \$10.4m for Q2. It also had a detrimental effect on income, which was \$18.9m in 2019, with the operator reporting a net loss of \$100m for Q2 2020.

The organisation also said 51 properties of the new Caesars Entertainment have resumed operations since mid-May, after closing in March.

Elsewhere, casino supplier AGS saw Q2 revenue fall 78% from 2019, down to \$16.8m. Loss of income from operations was \$28.7m, a massive drop compared to almost \$2m of income in 2019.

Net loss was \$42.6m, an increase from \$7.6m the previous year.

GI Verdict: As online gaming has spiked, the opposite can be said for the land-based sector. Casino operators and suppliers are coming to terms with the impact of months of property closures, and have had no other choice but to focus on the long road to recovery. Many casinos are now open in the US, but the fact they’re operating with heavy constraints and high fixed costs means it might not be until at least 2022 when we see a full recovery for the sector.

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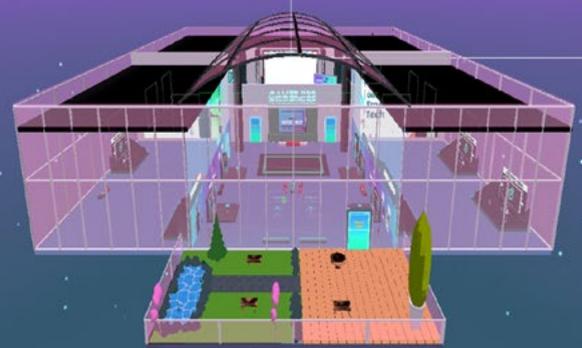
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"We're excited to work with the NASCAR team to build immersive sports betting experiences that 21st century racing fans crave. BetMGM's unparalleled betting technology, combined with NASCAR's iconic races, will create a superior betting experience for racing fans all over the US."

Matt Prevost, BetMGM CMO, speaks about the company's new multi-year partnership with NASCAR

"Expanding into the US is the next step for the organisation. We have a strong European presence, very experienced teams, premium products on both casino and sports, so tackling more regulated markets is a logical strategic move for us. I welcome Erik to our team, and I personally admire his skills, experience and determination. I am delighted that we can attract such talent in our leadership team."

EveryMatrix Group CEO Ebbe Groes comments on the recruitment of online gaming executive Erik Nyman to the company's leadership team

STUDY: CASINOS IN NEVADA HAVE LOST MORE THAN \$12BN IN REVENUE DURING PANDEMIC

Casinos in Nevada have been the worst hit by the coronavirus pandemic losing more than \$12bn in total revenue, according to a study.

Research by bestcasinosites.net shows the 334 casinos in Nevada lost an average of \$33.3m in revenue each day, as venues were closed from March until June, meaning the state ranked number one for the most revenue lost.

The study ranks the 58 destinations with the highest revenue from casinos worldwide, to uncover which jurisdiction has been the worst hit during the COVID-19 pandemic.

The second-highest affected destination was the pachinko market in Japan, losing a total of \$8bn, an average of \$22.2m lost for every day properties were closed.

Macau was ranked in ninth place, with losses totalling \$2.73bn, equating to \$7.5m daily for its 41 casinos, while Singapore was third, Canada fourth and Australia fifth.

France was ranked as the highest impacted in Europe, sitting 10th overall, with total losses of \$2.66bn.

The \$1.84bn losses for casinos in Great Britain put the market in 15th place, with an average daily loss of just more than \$5m for the 150 casinos, which remain closed until at least 15 August.

However, the US market was the hardest hit overall, with New Jersey, Pennsylvania and New York also featuring in the top 10.

While land-based venues have been significantly hit by the pandemic, industry has shifted to online alternatives as a result.

GI Verdict: The fact casinos in Nevada have suffered a \$12bn loss in revenue, puts into perspective just how damaging the coronavirus pandemic has been to the land-based industry. It also demonstrates just how popular certain destination casinos are now that we can clearly see the impact closures have had. The \$1.84bn losses for casinos in Great Britain is another standout figure, considering venues still haven't reopened and it's still unclear whether they will resume operations on 15 August.

Those losses will only continue to rise the longer casinos are closed in GB.

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Sands China 32.65 HKD	↑	10%
Wynn Macau 14.72 HKD	↑	12%
Newgioco 2.67 USD	↓	9%
MGM Resorts 21.13 USD	↑	14%
William Hill 132.35 GBp	↑	1%

CONTINENT 8 TO SPONSOR EXECUTIVE AWARD AT GLOBAL GAMING AWARDS LAS VEGAS 2020

Leading provider Continent 8 Technologies is sponsoring the American Executive of the Year Award at the Global Gaming Awards Las Vegas 2020.

The Executive of the Year is the only category that recognises the individual rather than the company, with 25 of the industry's most influential execs shortlisted for the prestigious Award.

Continent 8's sponsorship adds to the category's prestige, with the supplier having delivered digital products and services to the gaming sector for two decades.

The company has points of presence across the US, as well as data centres in Denver, Arkansas, Mississippi, Tennessee, Iowa, Illinois, Indiana, Virginia, West Virginia, Ohio, Michigan, Pennsylvania, New York and New Jersey.

Gambling Insider COO Julian Perry said: "We are delighted to have Continent 8, a long-serving member of the gaming community, on board as a sponsor.

"The American Executive of the Year category is one of our most exciting: truly, anyone can win if they've made an impression on their peers throughout the year."

The Las Vegas Awards are now in their seventh year and will see companies battle it out in 12 categories, with BetConstruct returning as Lead Partner of the Awards for the fourth time.

The Awards are powered by *Gambling Insider* and *Gaming America*, in association with G2E, and will feature the most prestigious and influential companies in our sector.

This year, the ceremony will take place virtually for the first time due to the impacts of the COVID-19 pandemic.

The Awards are independently adjudicated by KPMG to ensure total fairness and transparency, while all shortlisted companies have already been contacted.



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NJ GENERATES ONLINE GAMING RECORD

New Jersey generated a record \$87.493m in online gaming revenue in July, up 122.54% vs. last year despite land-based casinos being open.

That beat the record of \$85.940m set in May.

For the second straight month, Caesars' Tropicana and Caesars Atlantic City were the only two casinos that didn't double online gaming revenue, though they still soared more than 60%.

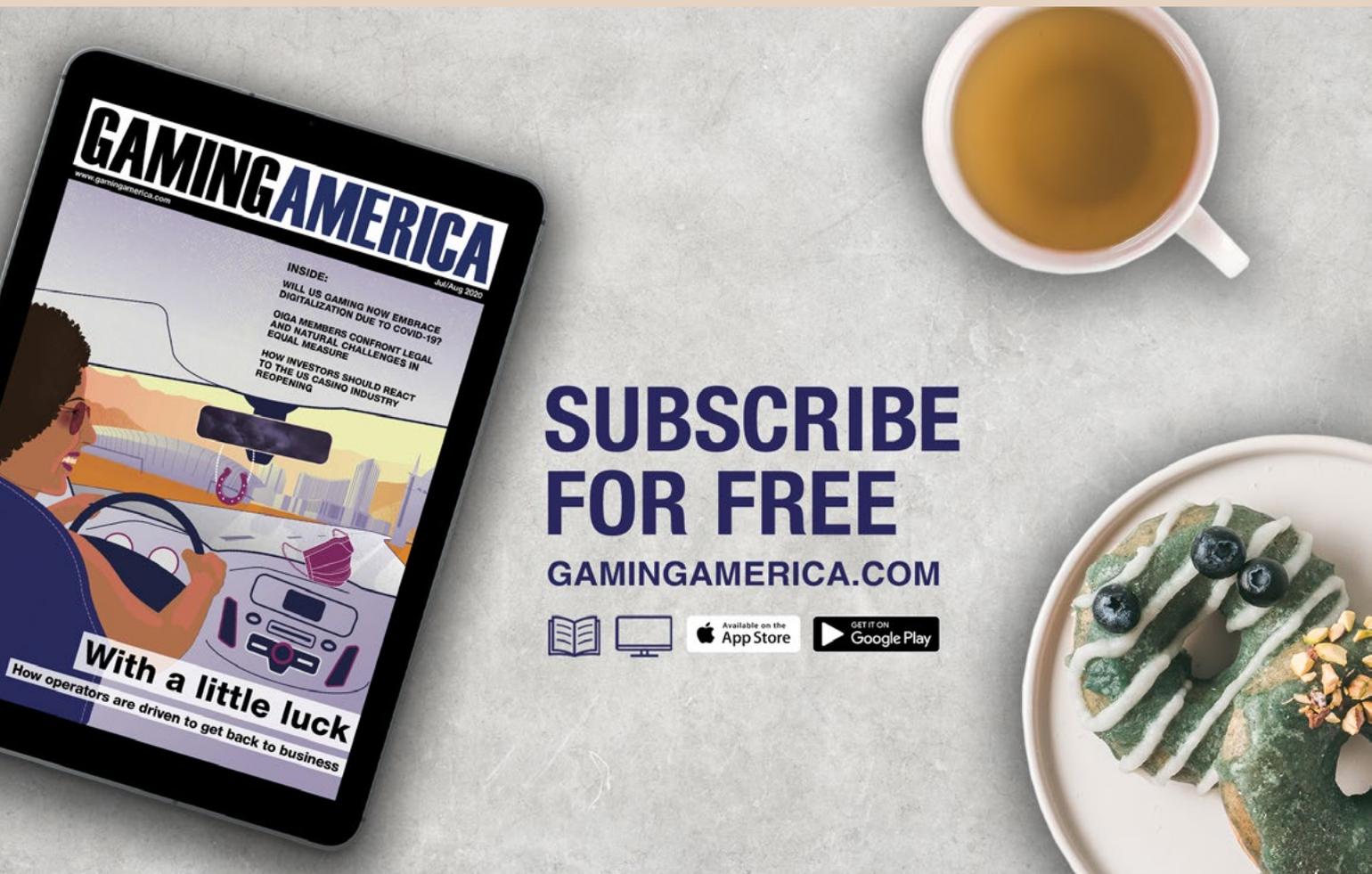
Total gaming revenue fell 20.90% despite another great month for online gaming and sports betting.

However, land-based casinos Resorts, Ocean and Golden Nugget grew revenue year-over-year. Casinos opened July 4 weekend except for MGM's Borgata.

Sports betting increased 65.24% to \$29.552m despite the sparse sporting events calendar.

SPORTS BETTING

MARKET/PROPERTY	REVENUE	% CHANGE	PARTNER (%)
Hard Rock	\$856,358	+456.11	GiG
Borgata	\$2.964M	+244.81	GVC
Ocean	\$1.432M	+144.00	WMH
Resorts Digital	\$8.156M	+119.17	FLTR/DKNG/Kambi
Meadowlands	\$14.087M	+54.97	FLTR, PBH
Monmouth Park	\$1.699M	-13.85	WMH/Rush St
Tropicana	\$105,151	-16.71	WMH
Bally's	\$232,331	-52.82	SGMS/888
Golden Nugget	\$98,464	-55.99	DKNG/CHDN
Resorts	(\$1,728)	-100.32	DKNG
Harrah's	(\$76,393)	-167.29	SGMS
Sports Betting Total	\$29.55M	+65.24	



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INTERACTIVE

MARKET/PROPERTY	REVENUE (M)	% CHANGE	% SHARE	PARTNER
Ocean	\$1.214	+217.28	1.4%	GAN
Hard Rock	\$5.610	+194.72	6.4%	GiG
Resorts Digital	\$18.032	+162.52	20.6%	SGMS, FLTR
Borgata (MGM)	\$15.297	+140.31	17.5%	GVC, Pala
Golden Nugget	\$31.480	+111.34	36.0%	FLTR, GAN, SGMS
Caesars (CZR)	\$9.673	+90.34	11.1%	888, SGMS
Tropicana (CZR)	\$6.188	+62.05	7.1%	Gamesys
iGaming Total	\$87.493	+122.54		
Poker	\$4.819	+155.37		
Casino	\$82.674	+120.88		

STATE TOTAL

CASINOS	REVENUE (M)	(%) CHANGE
Resorts	\$38.152	+32.70
Ocean	\$26.277	+30.27
Golden Nugget	\$40.397	+16.89
Caesars (CZR)	\$27.887	-7.01
Bally's AC (CZR)	\$14.631	-19.82
Hard Rock	\$31.053	-23.83
Harrah's (CZR)	\$21.148	-29.18
Tropicana (CZR)	\$22.498	-31.79
Borgata (MGM)	\$26.656	-69.71
Casino Total	\$248.700	-23.08
RACETRACKS		
Meadowlands	\$14.087	+54.97
Monmouth Park	\$1.699	-13.85
Racetrack Total	\$15.786	+42.70
NJ Gaming Total	\$264.486	-20.90

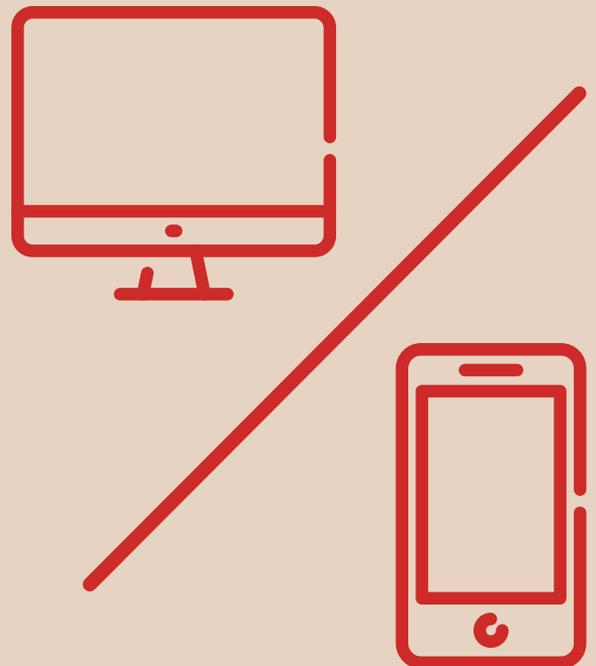
LAND-BASED CASINOS

MARKET/PROPERTY	REVENUE (M)	% CHANGE	TABLE HOLD	
			2020	2019
Ocean	\$23.632	+23.07	14.3	7.8
Bally's AC (CZR)	\$14.399	-18.90	18.3	15.6
Caesars (CZR)	\$18.214	-26.88	15.7	12.1
Harrah's (CZR)	\$21.224	-28.65	18.5	19.9
Resorts	\$11.965	-32.07	11.2	14.1
Hard Rock	\$24.587	-36.48	8.2	18.4
Tropicana (CZR)	\$16.205	-44.19	21.3	15.8
Golden Nugget	\$8.818	-54.64	18.3	19.2
Borgata (MGM)	\$8.395	-89.61	13.8	22.9
Land-based Total	\$147.441	-46.81		
MULTIPLE PROPERTY COMPANIES:				
Caesars	\$85.903	-22.15		

MOBILE VS DESKTOP SPECIAL

With the rise of mobile gaming so prominent compared to desktop in recent years, *Gambling Insider* speaks to industry experts about how to maximise the mobile experience for its growing amount of players:

- **RELAX GAMING:** Martin Stalros
- **GREEN JADE GAMES:** Ben McDonagh



GUEST COLUMNIST

MARTIN STALROS

COO, Relax Gaming

Stalros discusses the age of mobile



The statistics are hard to ignore. Across the past five years, our proprietary games in each vertical have experienced spikes in mobile players, with each sector showing a stark shift towards more convenient and on-the-go entertainment practices. Optimising the experience for portrait mode and landscape, and tailoring both right and left-handed use, are now just basic prerequisites for a product to gain traction in today's saturated market. To really succeed, every aspect of the gaming experience should be fine-tuned to the demands of mobile players from faster-loading, lighter assets and the user interface, fitting effortlessly into devices.

There is no better example of the progress made through mobile than online poker. In the first half of the last decade, the vertical's slowness to adapt to the mobile revolution triggered a prolonged period of declining revenues. Over the last few years, however, it's made an impressive comeback. The development of products optimised for mobile play, combined with the creation of more accessible game formats, has breathed new life into the sector. A recent project by our poker team finally broke through one of the last remaining vertical-wide challenges that had been holding poker back for years: they succeeded in enabling play through the mobile browser. Since poker platforms are generally quite heavy, they've only been accessible through native apps for mobile – until now. This new framework technology offers customers the chance to play poker directly through mobile browsers as well as the standard downloadable app, on both iOS and Android, significantly expanding the accessibility of the vertical, which brought about a rekindling of love for poker among many.

Additionally, most of the top-ranking slots today are built with mechanics that leverage smartphone features too, creating gameplay that lends itself perfectly to the device; a recent example of this is

Snake Arena, which owes a portion of its success to the classic 90s mobile game that inspired it, Snake. Today, symbols, reels and backgrounds are tested for clarity on mobile screens at the earliest stages of production, with attention given to every minor detail to ensure mobile users get the intended experience. Mobile UI and UX principles are taken into account throughout; focus is given to the players' journey and behaviour, with finger-friendly tap targets, minimal 'clutter' and self-evident navigation.

Similar gains are now being made in bingo and the race is on among suppliers to set the new blueprint for success in mobile. Games are becoming more interactive and easier to follow, with better mobile UI, and new features designed to improve the usability and ramp up the excitement. Features such as the racetrack functionality, which gives users oversight on other players' performance so they can compare against their own progress, ticket sorting, as well as new layouts to suit mobile screens, have transformed the way bingo is played and opened the vertical up to players belonging to different demographics. Although mobile revenue in bingo was already steadily increasing, innovations like these have been responsible for accelerating the trajectory – and there's no sign of it slowing down.

Of course, none of this is to say that enhanced focus on mobile should come at the cost of multi-device functionality. Many players will still prefer to enjoy casino content on their computers or desktops, and ignoring this segment of the market is not the objective. Instead, developers need to move away from a blanket multi-channel offering and look at the features that are unique to the device. With the level of technology now available, delivering exceptional play across a range of devices no longer requires much heavy lifting. Designing with mobile gamers front of mind, however, is the best place to start.

Mobile optimisation is hardly a new trend; it's been at the forefront of the industry's development since the smartphone became an indispensable part of everyday life and HTML5 consigned Flash to the graveyard. For years, suppliers and operators have been focused on delivering products with multi-device functionality, offering gaming experiences that are as seamless on mobile or tablets as they are on desktop. But as player volumes and spend on mobile now massively outstrip that of any other channel, a mobile-first approach is no longer a celebrated strategy, but a necessity.

GUEST COLUMNIST

BEN MCDONAGH

CEO, Green Jade Games

McDonagh from Green Jade says arcade skill games are a must-have addition to any mobile game lobby if operators are to truly leverage the power of smartphone and tablet play



Mobile is now the dominant channel of play and online gambling operators understand the need to offer the best possible experience to players accessing their sites from smartphones and tablets.

This includes mobile-optimised designs and layouts that ensure players are not required to scroll and swipe excessively, and cutting-edge platforms that deliver a seamless experience.

Similarly, acquisition and retention strategies must be built around mobile, ensuring operators communicate with players via the channels and devices where their attention can be found.

As part of this, operators need to stock their mobile game lobbies with the same quality

and volume of content as made available to those playing on desktop.

It is simply not good enough to offer 1,500+ slots, casino, table, live dealer and instant win games on desktop but just 500 or so to those playing from smartphone and tablet.

But mobile gaming is not just an issue of quantity. Operators must stock their lobbies with games that have been developed with mobile play in mind from the get-go.

Mobile players deserve to be given the best possible experience, but this is also because the mobile player demographic is broader than on desktop and player expectations are different.

While smartphone and tablet play is popular among mature player groups, it has allowed operators to engage new, younger players including fans of mobile games.

Many of these players are drawn to different types of content and games, and in particular more skill-based games such as puzzles and multiplayer games like Fortnite.

For operators wanting to fully exploit the mobile opportunity, and to be able to engage the widest possible demographic of player, they must give place to arcade skill games mixing RNG and skill.

This is not only to provide new mobile player demographics with content that offers the format of entertainment they are seeking, but to also give existing players something new and exciting.

The best thing about real money arcade games is they offer players a combination of the entertainment of a skill game and the thrill of a slot, especially when played from mobile.

Not only are they a powerful acquisition tool – among both new and mature players – they equally drive retention and take session times to new highs.

This is because players want to come back and improve scores, open the next level or improve their leaderboard position while having a shot at big wins in excess of 1,000 times their stake.

In some games, the bet cadence is slower, giving more entertainment time for every euro/pound/dollar spent, while others are faster than slots – with an extremely high RTP turning every session into fun gambling.

This gives arcade skill games widespread appeal, regardless of whether the player is seeking a more fun and casual experience or whether they're seeking a big-win thrill ride.

Given how easy it is for players to leave one mobile casino and join another, operators must provide the different experiences and levels of entertainment, and value for money, players are seeking.

Games are also perfectly suited to the different ways mobile players play – short sessions when on the go and longer sessions when playing while stationary (sat at home, riding the bus, etc).

This is brought together with game elements such as competitions and leaderboards, so regardless of when and for how long they are playing, players are incentivised to return to the game.

Operators that are serious about mobile must be serious about the games they offer their players. This is where adding arcade skill games becomes a no-brainer.

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