



WEEK 38

FRIDAY 18 SEP 2020

REVEALED: GLOBAL GAMING AWARDS LAS VEGAS 2020 SHORTLIST NOW

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SHORTLIST REVEALED





WEEK 38

FRIDAY 18 SEP 2020

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THIS WEEK

- Updates at Scientific Games
- Tom Watson joins Flutter
- New Jersey GGR rebounds
- Swedish GGR plummets
- ESPN signs operator deals
 - Park MGM to reopen
- New direction for 5Dimes
- Playtech H1 revenue falls

**GGA LAS VEGAS
CATEGORY BREAKDOWN**

US CEO SPECIAL PREVIEW

GUEST COLUMNIST:

- Peter Bassill, CEO,
Hedgehog Security

REVEALED: GLOBAL GAMING AWARDS LAS VEGAS 2020 SHORTLIST NOW AVAILABLE



The full Shortlist for the Global Gaming Awards Las Vegas 2020 is now available to view, ahead of its seventh edition.

The Awards, going virtual for the first time due to the COVID-19-enforced cancellation of G2E 2020, will see companies battle it out across 12 competitive categories.

Receiving a nomination is an outstanding achievement for any gaming industry company and is clear proof the organisation is rated among the world's very best.

The winners in all 12 categories will be confirmed during our virtual ceremony on Tuesday 27 October, the perfect way to kick off the G2E show.

Gambling Insider COO Julian Perry said: "During such a difficult year for the gaming sector, especially retail and land-based, it's a privilege to bring you the Shortlist for the Global Gaming Awards Las Vegas 2020.

"We wish the very best to all nominated companies and we are certain the Judges will have a difficult time separating such ultra-competitive fields across all categories."

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SHORTLISTED IN 2 CATEGORIES

DIGITAL PRODUCT
DIGITAL INDUSTRY SUPPLIER

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THIS WEEK IN NUMBERS

\$51.4m

The total amount of sports betting handle recorded by the Illinois Gaming Board in the state for July, the first full month of sports betting activity in Illinois



2nd

Place Football Index reached in The Sunday Times' Sage Tech Track 100, an accolade achieved less than five years since the operator launched in October 2015



Aristocrat went home with two Awards during the 2019 ceremony, although the competitive nature of the Awards and the diversity of the industry was well reflected, with 11 overall winners across the 12 categories.

The Shortlist was compiled through a lengthy process, which began with a period of self-nominations put forward by hopefuls, and recommendations made by the Nomination Panel.

The final Shortlist was then decided by members of the *Gambling Insider* team after much deliberation.

All nominated companies were asked to provide a supporting statement to the Judging Panel, outlining why they should be chosen to take home the Award.

This year's Judging Panel has reached a 100 Judges for the second year in a row, providing proof of the Awards' growth in popularity since the inaugural ceremony in 2014, as well as cementing the consistency of the Awards' success.

The Judges place their first and second-choice votes in all categories and the voting process is independently adjudicated by KMPG Isle of Man, ensuring full fairness and transparency.

The Awards are powered by *Gambling Insider* and *Gaming America*, in association with G2E, with BetConstruct returning as Lead Partner of the Awards for the fourth time. All nominations in all categories are explained in-depth in the Global Gaming Awards Las Vegas 2020 Shortlist magazine, which is available to read on GamblingInsider.com and via the *Gambling Insider* app on iOS and Android devices. All winners will be confirmed on GamblingInsider.com shortly after the presentation ceremony and will be available to view on GlobalGamingAwards.com/Vegas. The winners will also be listed in that week's *GI Friday*.

[Click here to read the Global Gaming Awards Las Vegas 2020 Shortlist in full](#)

WORLD DEBUT

243+ link WAYS BONUS



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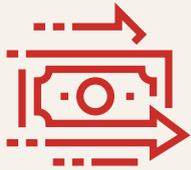
ALLURE 3x 27" FULL HD MONITORS

2021

Ireland's Minister for Justice Helene McEntee announced the launch of the country's new gambling regulatory framework has been delayed until at least next year

**£1.1m**

Amount (\$1.42m)
Winlink sued Liverpool Football Club for in damages relating to a £15m deal for BetVictor to sponsor the club, with the High Court case being won by the Premier League champion



RON PERELMAN TO SELL MAJORITY STAKE IN SCIENTIFIC GAMES; SHARES SOAR 52%

According to a company press release issued on Monday, majority Scientific Games shareholder and executive chairman Ron Perelman has agreed to sell his holdings in the company.

The billionaire runs MacAndrews and Forbes, a New York-based investment firm, and has been looking for options to sell some of his investments as a result of the impact of COVID-19. The personal fortune of 77-year-old Perelman has fallen by more than half its total value since 2018 to around \$8bn, according to the Bloomberg Billionaire Index.

Gambling Insider previously reported Perelman had been considering the sale of his 39% stake in the company. A filing with the Securities and Exchange Commission earlier this year showed Perelman was exploring the sale of over 36.8 million shares in Scientific Games.

Perelman has valued the gaming company at around \$2bn. He will sell 34.9% of his stake in the company to Australian fund Caledonia at a price of \$28 per share. This will see Scientific

Games terminate its stockholders agreement with MacAndrews and Forbes. The sale is expected to be completed over the next several weeks.

Scientific Games confirmed the sale, which will also see significant changes to the company's board. Jamie Odell, former CEO of Aristocrat, and Toni Korsanos, former CFO of Aristocrat, will become the supplier's new executive chair and executive vice chair, respectively. These changes came into effect on Monday.

Perelman will resign from the board once the sale is completed. Barry Schwartz and Frances Townsend, two other MacAndrews and Forbes representatives, will also resign.

Commenting on the sale of Perelman's stake, Barry Cottle, president and CEO of Scientific Games, said: "Scientific Games is well-positioned for future success given our industry-leading portfolio of products and technologies, loyal customer base and talented leadership team."

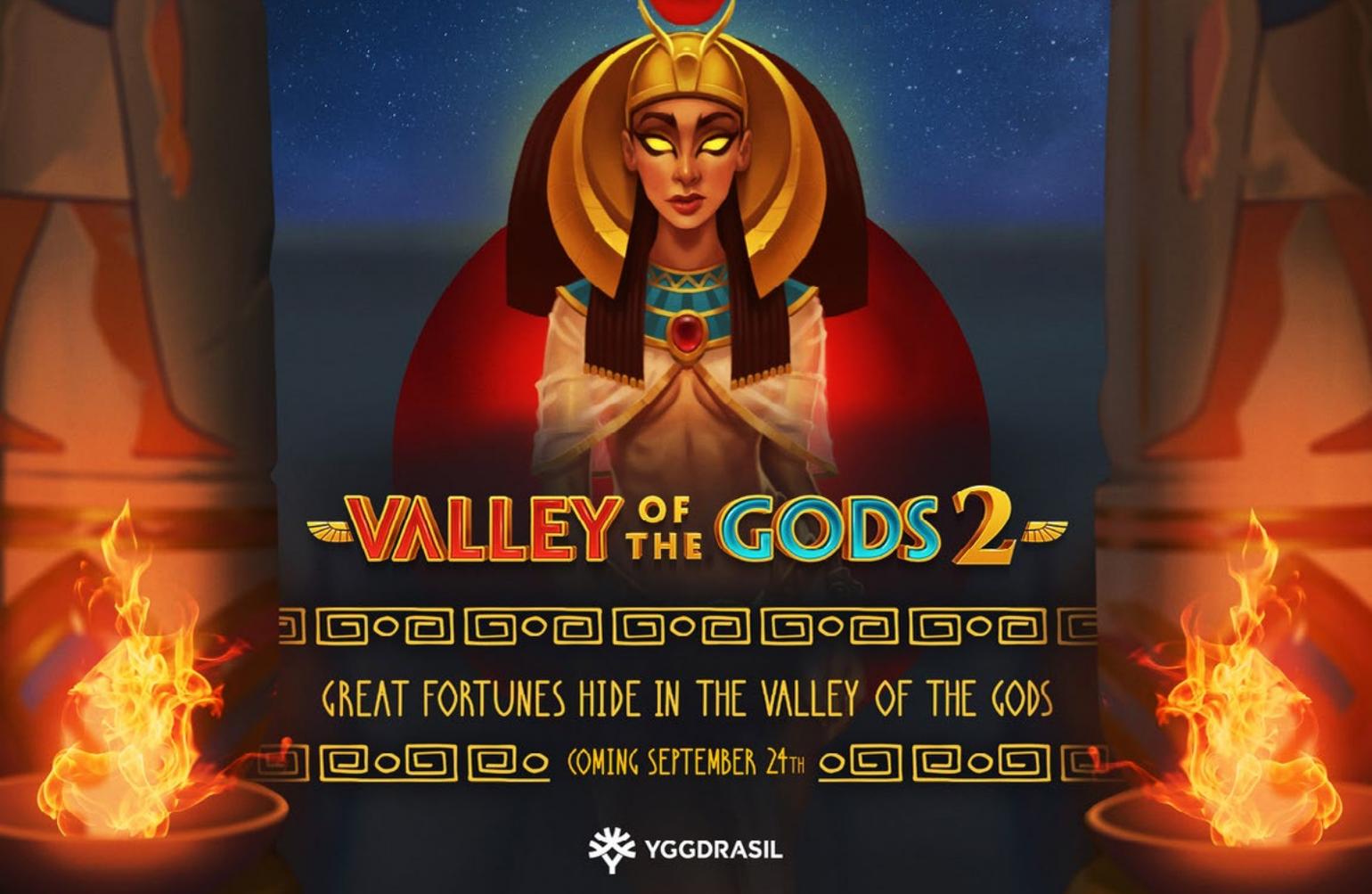


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VALLEY OF THE GODS 2

GREAT FORTUNES HIDE IN THE VALLEY OF THE GODS

COMING SEPTEMBER 24TH



\$69.3m



Monthly aggregate revenue reported by the three Detroit casinos for August, announced by the Michigan Gaming Control Board (MGCB)



September 14

Date Macau Legend Development Limited announced it was halting trading in shares of the Stock Exchange of Hong Kong Limited, which came into force from 9am

“We are pleased to have the support of our refreshed board and new investor base as we continue to execute on our strategy to drive meaningful long-term growth and shareholder value creation.”

Shares in Scientific Games rose by as much as 52% on Monday after the announcement of the sale. This increased by a further 15% on the following day.

This share price increase could be attributed both to Caledonia’s acquisition and the new directive set out by the company in its board announcements. The supplier outlined its business plan moving forward, including transformative strategies to optimise the company’s business portfolio and shareholder value. The supplier is also hoping to accelerate debt reduction efforts and increase its focus on digital gaming and sports betting growth.

Union Gaming, an industry analyst group, has expressed its belief that the changes to Scientific Games’ board will allow the company to better enact this long-term strategy. The group also

believes Caledonia’s proven success in the industry will provide a boost to the company.

GI Verdict: It’s clear the Caledonia shares acquisition has created significant interest in Scientific Games this week – whether or not this will taper is another story. Naturally, this all depends on whether Scientific Games is able to execute its new business strategy and create results.

Scientific Games has struggled so far in 2020 as a result of the COVID-19 pandemic. The supplier saw a \$198m net loss for Q2 2020, a significant increase from losses of \$75m for the same period last year. Group revenue totalled \$539m, a 36% drop year-on-year.

Despite this, online gaming showed real promise. The segment saw a sharp 135% revenue increase in the US in comparison to 2019. It can be assumed Scientific Games’ plan to increase its focus on digital gaming is a direct result of this. As the need for digitalisation becomes ever more apparent and US markets open up, this certainly seems like a safe bet to maintain investor interest.

30 days



Timeframe within which BetConstruct aims to build clients a live casino studio from scratch, through its product Live Casino Studios

2020

Year Sportradar will monitor the integrity of all matches in the Indian Premier League season, after signing an agreement with the Board of Control for Cricket in India



TOM WATSON TEAMS UP WITH FLUTTER FOR SAFER GAMBLING DRIVE

Flutter Entertainment has announced the appointment of former deputy leader of the Labour Party Tom Watson as the company's safer gambling adviser.

During his time as an MP, Watson campaigned for gambling reform in the UK. In June last year, he discussed plans to set up a new gambling ombudsman to protect consumers and described problem gambling as one of Britain's hidden health epidemics.

Watson resigned as both Labour MP for West Bromwich East and deputy leader of the Labour Party in November 2019. Flutter said Watson's past experience will challenge the business, driving success in its journey towards improved safer gambling practice.

Commenting on his new role, Watson said: "I have a long-standing interest in this sector and consistently called for action to protect those that may be potentially vulnerable to harm.

"In taking on this role in Flutter, I intend to get under the bonnet of the

business – and the industry more widely – to understand how best to further develop and implement industry-leading responsible gambling policies."

Meanwhile, Peter Jackson, CEO of Flutter, said: "Bringing in someone with Tom's gambling reform background is an important part of my commitment to lead the industry's race to the top.

"We have to work harder than ever before to find a way to continue to bring great products and brands to our customers while always having the need to protect the vulnerable clearly in mind."

GI Verdict: Previously an ardent industry critic, Watson's stance towards the industry seems to have changed since his appearance at ICE London earlier this year.

Critics of Watson said he didn't do enough to stop problem gambling during his time in politics. Will he do more having now joined Flutter, or will this simply be an ambassadorial role?



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DIGITAL

\$150m



Amount in cash Genting Malaysia is planning to inject into Empire Resorts, meant as working capital for the subsidiary in which the casino operator holds a 49% stake

2022

Betway extended its worldwide partnership with Cricket West Indies (CWI) for at least two more years, which will see the operator continue its role as an official betting partner



NEW JERSEY GAMING REVENUE FALLS FOR AUGUST; ONLINE UP 114%

Total gaming revenue for August in New Jersey fell only 8%, a modest yearly decline considering reduced casino capacities upon reopenings.

Revenue accumulated to \$326.3m, while internet gaming win was up 114% to \$87.8m.

Sports wagering gross revenue was \$39.5m, a 60% rise, from handle of \$668m (\$602m of which came from online betting).

Casino win had understandably the biggest decline, down 31% to \$199.1m.

For the year-to-date period, New Jersey gaming revenue is down 29% to \$1.62bn, while internet gaming win is up 101% to \$598m.

Sports wagering gross revenue in the Garden State for 2020 so far is \$178m, up 17%.

GI Verdict: Sports betting handle figures were a new record for the state of New Jersey in August. And the numbers come as no surprise considering the return of major league sport in the US (and across

the world), pent-up demand and entertainment options still being restricted during the coronavirus pandemic.

The Garden State has ultimately shown the value of product diversification, as its online and sports betting rises have proven significant enough to make up for large chunks of land-based losses.

Considering the restrictions on casino capacities to 25-50%, a 30% fall in casino win is a respectable return for New Jersey casinos. But the fact the state's overall revenue is only down 8% is testament to the success of its online gaming and sports wagering verticals.

With its more-than-reasonable tax policy and pro-industry regulator, New Jersey is leading the way in terms of US digitalisation. But will more states follow suit, or will local governments and regulators prioritise higher taxes, and more forceful regulation?

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THE WEEK IN QUOTES

“With the UK economy officially in recession, it is absolutely vital that our politicians leave no stone unturned in their attempts to save the high street, because they are vital community hubs as well as major contributors to the Treasury.”

Betting and Gaming Council chairwoman Brigid Simmonds urges the UK Government to do more to support high-street betting shops and casinos

“The exchange did not manage to reach the critical mass necessary to make the operation profitable and efficient. There are several reasons for our decision to withdraw from the NJ market, including a customer base used to exotic wagers and a reluctance by major US racing associations to embrace a different business model.”

US Betfair Exchange CEO Kip Levin on the operator's withdrawal from the New Jersey gambling market

SWEDISH GGR LOWEST EVER SINCE REGULATED ONLINE GAMBLING LAUNCH

Swedish gross gaming revenue (GGR) for Q2 2020 was the lowest Sweden has seen since the introduction of regulated online gaming at the start of 2019.

According to the Swedish Gambling Authority (SGA), gambling license holders recorded a 4% GGR decrease year-on-year down to SEK5.94bn (\$677.5m) in 2020.

Despite an increase in online gambling revenue of 4% to SEK3.61bn, this figure was still less than earnings in the previous two quarters and not enough to offset the effects of COVID-19 on the land-based sector.

Svenska Spel lottery and gaming machines saw revenue fall 9% from 2019 to SEK1.29bn, a recovery of 15% on Q1 due to the resumption of gambling operations.

Svenska Spel's revenue from its lottery brand Tur rose 3% to SEK1.18bn, while its Vegas slot machines unit took SEK170m. However, its Casino Cosmopol chain reported no revenue at all as venues remained closed.

The end of the second quarter saw a little over 52,000 individuals suspended for games via Spelpaus.se, the national self-exclusion regulator.

Meanwhile, Swedish gambling operator association Branschföreningen för Onlinespel (BOS) called for a change in laws to allow it to access payment information to gambling operators, to block payments to unregulated sites, estimating an online channelisation rate of around 85%.

BOS secretary general Gustaf Hoffstedt said: “We continue to urge Spelinspektionen (SGA) to investigate the level of channelisation in Sweden, or alternatively to treat the channelisation reports from our association as official governmental documents. Correct estimates of the channelisation is the number one key performance indicator whether a gambling regulation is meeting its goals or not.”

GI Verdict: The chaos in the Sweden market continues with these latest results. There have been many critics of the new measures, including weekly deposit limits, brought in to deal with an apparent rise in online play.

With online revenue down 1% from Q1, and channelisation equally down, the restrictions have instead hindered the regulated market's progression.

“The issue of regulating the operation of gambling is primarily a question of finding a balanced solution while responding to the development of legislation and modern gaming technologies. On the one hand, this leaves the citizen free to decide and do business, and on the other, it reduces pathological phenomena associated with gambling.”

Prague councillor Hana Kordová Marvanová on why lawmakers voted in favour of a new decree banning all slot machines, VLTs and gaming machines

“I’m really curious to how the whole economies of each country will develop, because if there’s less money to spend on entertainment with more people out of work, then obviously this would be a potential hit to our industry.”

Former Interwetten speaker of the board Dominik Beier speaks to Gambling Insider about how worldwide uncertainty could impact gaming spend

ESPN SIGNS CO-EXCLUSIVE PARTNERSHIPS WITH CAESARS AND DRAFTKINGS

ESPN has entered into separate multi-year agreements with Caesars Entertainment and DraftKings.

Caesars will act as ESPN’s exclusive odds provider while DraftKings will be the sports media giant’s exclusive daily fantasy sports provider.

Caesars’ betting partner William Hill joins DraftKings as ESPN’s co-exclusive sportsbook link-out provider.

Mike Morrison, vice president of business development & innovation, ESPN, said, “Our new agreements with Caesars and DraftKings collectively represent the next significant milestone for ESPN to diversify our exposure and deepen our commitment in the sports betting space.”

DraftKings CEO Jason Robins also commented on the partnership: “ESPN’s reach among sports fans is unparalleled, and the start of the NFL is the perfect time for DraftKings to be launching this integration.”

ESPN recently launched a studio at Caesars property The LINQ on the Las Vegas Strip incorporating William Hill odds. The studio will serve as the network’s hub for sports

betting content. DraftKings will also power DFS segments on ESPN’s studio show.

As part of the agreements, ESPN will offer geo-targeted sports betting links on its website and fantasy app.

Shares in DraftKings and Caesars jumped as much as 12% and 7% respectively on Monday after the deal was announced.

GI Verdict: The industry has steadily integrated with the world of North American sports through partnership deals with teams, leagues and media companies.

As we look at some of the figures coming out of the US as major sports return, it seems this tactic may be working.

As stated in our earlier story, New Jersey broke the national record for highest sports betting handle, seeing a total of \$668m wagered in August.

However, New Jersey was not alone. West Virginia broke its previous state record with sports betting handle totalling \$40.4m for August, while Iowa handle increased twofold month-on-month to \$50.3m. Clearly the interest is there for US bettors.

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“For any brick-and-mortar business out there that is looking to innovate – which I believe all of them are – there will be plenty of new ways of adapting to the situation.”

Synergy Blue CEO Georg Washington speaks to Gaming America about innovation during the pandemic

“I think the industry has to pay very close attention to our customer base in order to make certain that the people who were totally fine six, eight, 12 months ago aren't now coming in in a different way. We just have to be sensitive about that.”

Nevada State Advisory Committee on Problem Gambling chair Alan Feldman speaks during a webinar on responsible gambling

PARK MGM AND NOMAD TO REOPEN 30 SEPTEMBER

Park MGM and NoMad Las Vegas will reopen their doors on 30 September, MGM Resorts International has announced.

The property reopenings will complete the reopening process for every one of the operator's properties around the world following COVID-19-enforced closures.

Park MGM is the Las Vegas Strip's newest destination resort, being completed in late 2018.

Both Park MGM and NoMad Las Vegas will open with an extensive list of health and safety procedures. Meanwhile, the Four Seasons Las Vegas property will also reopen on 25 September.

Anton Nikodemus, president of MGM Resorts' Las Vegas Portfolio, said: “As we looked toward our reopening, we identified an opportunity to be responsive to recurring guest demand for a fully non-smoking casino resort on The Strip.

“With an expansive Las Vegas portfolio, MGM Resorts is able to offer an array of options for visitors, all within the MGM Resorts family.”

Bill Hornbuckle, MGM Resorts CEO and president, said: “Opening Park MGM and

NoMad represent significant milestones, as they are the last of our properties to welcome back employees and guests alike.

“The last six months have presented extraordinary challenges and I could not be prouder of the MGM Resorts team for the tireless effort required to get us here.

“There is much work ahead as we remain focused on the health and safety of our employees and guests, but this is an important moment for us.”

GI Verdict: MGM Resorts International will be able to breathe a sigh of relief as doors open for its final two properties.

For Q2, the operator saw significant effects from the closure of its properties. Net loss was \$857m, compared to net income of \$43m earned Q2 of the prior year.

Of course, the impact of the pandemic is far from over. The two casinos will be limited to a 50% capacity and subject to a number of other restrictions. But with all properties soon open, MGM Resorts can start to build momentum.

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BRAZIL

INDIA

MEXICO

TAKING STOCK

SHARE PRICES COVER THURSDAY
10 SEPTEMBER TO THURSDAY 17
SEPTEMBER (10:00AM BST)

Scientific Games
30.90 USD



61%

DraftKings
51.03 USD



20%

MGM Resorts
23.01 USD



1%

Penn National
67.84 USD



9%

Caesars Entertainment
55.94 USD



10%

5DIMES CONFIRMS PLANS TO ENTER REGULATED MARKET

Offshore sportsbook 5Dimes is pursuing efforts to enter the regulated US market, according to the widow of its founder.

Earlier this month, the Costa Rica-based operator announced intentions to suspend its US operations from 21 September, with the aim of improving its betting services.

It hinted at plans to “take advantage of the opportunity to offer an improved online sports betting experience”, with the suspension needed to transition and relaunch operations.

Now, the widow of 5Dimes founder William Sean Creighton, who was found dead in September 2019, has confirmed the operator’s plans to enter the regulated market, suggesting there will be surprises in store for customers.

Laura Varela said: “Sean worked incredibly hard to provide the best online sports betting experience to the 5Dimes community. I am so humbled and gratified by the many loyal customers who love the 5Dimes brand.

“Many of you are asking about the brand’s future. I am limited in what I can

disclose right now, but there are definitely some positive surprises in store for you.

“I am working with experts and consultants to make sure the brand you have come to love is well represented in the regulated US market.

“Based on what I’ve heard, a lot of you want that, too! Stay tuned, and please come back again soon for updates!”

5Dimes customers have until 25 September to claim their existing balances, which will be transferred to a third-party administrator after that date, who will attempt to return the funds.

GI Verdict: Varela has confirmed what many anticipated after the offshore operator announced plans to suspend its US business. Entering the regulated market seems a logical step for 5Dimes, but might be tougher than it appears, with many US state regulators not overly fond of black-market operators. There have also been reports that customers have had accounts transferred to fellow offshore sites, so it will be interesting to keep an eye on what happens next for 5Dimes.

TAKING STOCK

SHARE PRICES COVER THURSDAY
10 SEPTEMBER TO THURSDAY 17
SEPTEMBER (10:00AM BST)

Newgioco
1.64 USD  15%

Playtech
368.10 GBp  1%

IGT
12.31 USD  9%

Kambi
270.20 SEK  15%

Rank Group
104.20 GBp  17%

PLAYTECH REVENUE DOWN 23% FOR H1 DUE TO CORONAVIRUS IMPACT

Playtech has seen its revenue drop 23% year-on-year for H1 2020, as a result of the coronavirus pandemic impacting its business operations.

Reported revenue for the six months to 30 June fell to €564m (\$665.7m), while adjusted EBITDA dropped by 16%, down to €162.3m.

The supplier's reported profit declined 81% from 2019, down to €4.6m, and the group's adjusted gross cash saw a decrease of 15%, to €349.6m.

Its B2C business was affected the most, with revenue dropping 41% to €253.5m for H1, mainly due to all major live sport being suspended in mid-March, along with the closures of retail venues for several months.

That meant its Italian betting operator Snaitech saw revenue fall by 46% to €215.5m, although a rise in online play during lockdown saw its online revenue rise 37%.

Playtech CEO Mor Weizer, said: "The attitude of our people coupled with

the resilience and diversification of our technology-led business model has delivered a strong first half performance during an extremely challenging period for the industry.

"These strengths, combined with early decisive action to focus on the safety of our employees and protect the group's cash flow, has placed us in a strong position to benefit from the recovery and to capture the exciting market opportunity in the US and Latin America."

GI Verdict: Playtech's headline takeaway points from its H1 results did attempt to gloss over its fall in revenue; but the impact of the COVID-19 pandemic cannot be understated on the supplier.

That said, it was hit much less than others due to product diversification, and its healthy cash flow should leave Playtech in a better position than plenty of its rivals in the coming months.

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PENNSYLVANIA ONLINE GAMING BOOMS

Pennsylvania online gaming boomed in August, growing 2.93% to a record \$55.943m vs. July. That beat the record \$55.839m set in May.

Sports betting revenue tanked 74.69% to \$27.594m but doubled July's revenue. Slots and tables fell double digits.

Only Mount Airy and Penn National's Hollywood grew total gaming revenue. Mount Airy was the only casino with growth in slots and table games.

Fantasy sports revenue skyrocketed 71.46% to \$2.13m. DraftKings' revenue grew 60.79% to \$1.215m and accounted for 56.9% of total fantasy sports revenue. Flutter's FanDuel accounted for 42.42%.

Revenue from slot routes increased a whopping 2,963% to \$1.722m in August.

TOTAL GAMING	PENNSYLVANIA AUGUST 2020 REVENUE (M)	YEARLY CHANGE (%)
Mount Airy	\$27.894	+58.87
Hollywood (PENN)	\$28.570	+18.16
Mohegan Sun	\$20.134	-1.66
Parx (Greenwood)	\$58.904	-8.46
The Meadows (PENN)	\$18.958	-9.28
Harrah's Philadelphia (CZR)	\$19.699	-11.71
Wind Creek Bethlehem	\$33.161	-26.28
Rivers Philadelphia (Rush Street)	\$39.694	-29.79
Lady Luck Nemaocolin (CHDN)	\$2.399	-29.81
Presque Isle (CHDN)	\$8.705	-33.71
Valley Forge (BYD)	\$31.303	-37.82
Rivers (Rush Street)	\$25.281	-53.00
South Philly Turf Club (Greenwood)	\$0.070	-96.49
Total	\$314.772	-20.29
Same Store*	\$231.235	-41.45

PENNSYLVANIA ONLINE GAMING BOOMS

LEGACY CASINOS	PENNSYLVANIA AUGUST 2020 REVENUE (M)	YEARLY CHANGE (%)
Mount Airy	\$18.959	+7.98
Harrah's Philadelphia (CZR)	\$19.477	-4.68
Parx (Greenwood)	\$49.735	-4.84
Hollywood (PENN)	\$16.593	-18.96
Valley Forge (BYD)	\$9.947	-20.52
Rivers Philadelphia (Rush Street)	\$20.219	-20.59
Mohegan Sun	\$16.138	-21.18
Wind Creek Bethlehem	\$33.161	-26.28
Presque Isle (CHDN)	\$8.633	-27.66
Rivers (Rush Street)	\$22.817	-28.77
Lady Luck Nemaquin (CHDN)	\$2.399	-29.81
The Meadows (PENN)	\$14.041	-32.81
Total Legacy Casinos	\$232.119	-17.82

GLOBAL GAMING AWARDS LAS VEGAS 2020

SHORTLIST

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PENNSYLVANIA ONLINE GAMING BOOMS

SPORTS BETTING	PENNSYLVANIA AUGUST 2020 REVENUE (M)	YEARLY CHANGE (%)	PARTNERS
Valley Forge (BYD)	\$12.645	-66.57	BYD/FLTR
Parx (Greenwood)	\$1.718	-84.37	Greenwood/Kambi
Harrah's (CZR)	\$0.221	-88.19	CZR/SGMS
Rivers (Rush Street)	\$2.251	-89.66	Rush St/Kambi
Hollywood (PENN)	\$0.185	-90.98	PENN
Rivers Philadelphia (Rush Street)	\$2.332	-92.33	Rush St/Kambi
South Philly Turf (Greenwood)	\$0.070	-96.49	Greenwood/Kambi
Presque Isle (CHDN)	\$0.038	-96.76	CHDN
Mount Airy	\$2.078	N/A	FLTR
Mohegan Sun Pocono	\$1.003	N/A	Kindred
The Meadows (PENN)	\$4.917	N/A	DKNG
Mohegan - Lehigh Valley	\$0.133	N/A	Kindred
Total Sports Betting	\$27.594	-74.69	N/A

PENNSYLVANIA ONLINE GAMING BOOMS

ONLINE GAMING	PENNSYLVANIA AUGUST 2020 REVENUE (M)	YEARLY CHANGE (%)	PARTNERS
Rivers Philadelphia (Rush Street)	\$17.142	+2,404.46	Rush St
Hollywood (PENN)	\$11.792	+615.34	PENN/FLTR
Parx (Greenwood)	\$7.451	+579.97	N/A
Greenwood/GAN	N/A	N/A	N/A
Mount Airy	\$6.858	N/A	Kindred/FLTR
Mohegan	\$2.993	N/A	Kindred
Presque Isle (CHDN)	\$0.033	N/A	CHDN
Valley Forge (BYD)	\$8.711	N/A	BYD/FLTR
Caesars Interactive	\$0.724	N/A	N/A
Wind Creek Bethlehem	\$0.213	N/A	Pala Interactive
Live! Philadelphia (Cordish Cos.)	\$0.025	N/A	N/A
Online Gaming Total	\$55.943	+1,531.62	N/A

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THE AWARDS UP FOR GRABS

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LAND-BASED OPERATOR

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This Award will recognise the leading performers across all forms of land-based gaming, with the very best casino and racetrack operators making the Shortlist. Last year, Eldorado Resorts (now Caesars Entertainment) claimed victory.

DIGITAL OPERATOR

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The Digital Operator category covers the entirety of the online sector, recognising those companies which are driving forward the dynamic and rapidly evolving online gaming industry. DraftKings won in 2019.

LAND-BASED PRODUCT

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The Land-Based Product of the Year category is one of the ceremony's most varied. Any product can be nominated if it improves the experience of the player. Last year's winner was Interblock - Stadium.

READ THE FULL SHORTLIST ONLINE!

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CUSTOMER LOYALTY PROGRAM

The customer loyalty program has one of the biggest impacts on the player's relationship with the operator. Barring one year, MGM Resorts International's M life has won every year, including during last year's ceremony.

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DIGITAL INDUSTRY SUPPLIER

This category rewards the providers the industry is relying on most to take digital gaming forward. Kambi came out on top in this category last year, following SG Digital's victory in 2018.

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LAND-BASED INDUSTRY SUPPLIER

This category seeks to recognise the dedicated efforts of those who drive the brick-and-mortar casino and retail betting development. Aristocrat was last year's winner and Scientific Games won in 2018.

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DIGITAL PRODUCT

This Award covers any feature or innovation that has improved its particular sector in the previous 12 months. Scientific Games' OpenSports platform was voted in first place in 2019.

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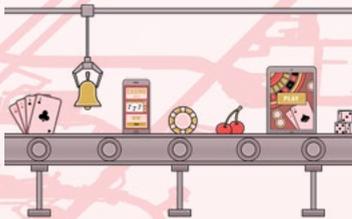
PROPERTY

This category is back again, recognising properties which continue to evolve and adapt to the needs of an ever-changing consumer base. Borgata Hotel Casino & Spa and The Venetian Macao have won this Award.

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PRODUCT INNOVATION



This Award was another new addition in 2018, and is one of the few categories that combines both the land-based and digital sectors. Evolution Gaming and Incredible Technologies have both triumphed in this category.

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SLOT

A third debutant in 2018, this is a category for slot games that have set themselves apart from other games on the casino floor. Last year, Aristocrat topped the chart with its Buffalo Diamond slot.

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RESPONSIBLE BUSINESS

The principle quality of any great gaming firm beyond producing the best products for its customers should be to have a commitment to responsibility. Last year's winner was GLI, with GeoComply winning in 2018.

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AMERICAN EXECUTIVE

This is the only category in the Awards that recognises the individual instead of the company. David Lopez, AGS president and CEO, came out on top last year.

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CEO SPECIAL PREVIEW

We interviewed some of the top-ranking CEOs in the gaming industry for the September/October edition of *Gambling Insider* magazine. Here, we include a preview of each one:

MITCHELL BOWEN - ARISTOCRAT

DAVID LOPEZ - AGS

ELAINE HODGSON - INCREDIBLE TECHNOLOGIES

JORDAN LEVIN - SG DIGITAL

RENATO ASCOLI - IGT



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CEO SPECIAL PREVIEW - ARISTOCRAT

TESTING TIMES

Mitchell Bowen, CEO, global land-based (gaming) business at Aristocrat, describes the company's culture of resilience and how it's been the source of efforts to remain flexible and vital, as well as a reminder of the need to control what you can

Can you give us a little bit of your background: how you got involved in the gaming industry, when you started at Aristocrat and your growth within the company.

I joined Aristocrat as a graduate recruit, after a short stint in the pharmaceutical industry. Aristocrat is the sort of business that can offer a career and not just a job because of our size, growth and our culture.

We tend to take a long-term view and we invest in people's development. I've worked in the US and in Australia, and held a range of roles including in product management, marketing, sales and general management.

Today, I'm the CEO of our global land-based or regulated business, and I also lead the transformation function for the group.

Can you give an indication of Aristocrat's trajectory going into 2020 based on strategies implemented and 2019 results?

Clearly we're in uncertain times, but we are seeing some encouraging signs coming through where customers have reopened and visitation and sentiment is probably better than we would have expected it to be at this point.

We came into this period operationally and financially in great shape to best serve our customers.

We know that recovery will take some time, and there will be bumps along the road, but we have a lot of confidence in the resilience of the industry. We also believe strongly in our people and ability to help customers adapt and rebound.



SINK OR SWIM

From dealing with customers stuck in a lift, to approaching seven years as AGS president and CEO, David Lopez reflects with Tim Poole on the career lessons he's learned, the mentors he's had and the dreams he still harbours

Even though AGS president and CEO David Lopez graduated from the University of Nevada, Las Vegas (UNLV), there is no question in his eyes where he learned the most during his formative years.

"Honestly, the most education I got was from my mother and her business," he tells *Gambling Insider*. "I learned a lot more from the family catering business than I did in any of my years of education. Working for my mom and the things she instilled, and for sure my military time, are what shaped me as the person I am today."

This opening answer from Lopez, AGS president and CEO since February 2014, speaks to the exec's down-to-earth character.

It's a quality he has always displayed speaking to *Gambling Insider* and one that no doubt helped win him the American Executive of the Year Award

at the Global Gaming Awards Las Vegas 2019. It will have served Lopez equally well during the most challenging period land-based gaming companies have ever endured: the COVID-19 pandemic.

As Lopez speaks to us via video call from his home office, he discusses how he and others have taken paycuts to help reduce costs at AGS.

He also speaks of helping the communities AGS is a part of and his dream of becoming a teacher before he retires.

Notably, he laughs when recalling how small the issues discussed in his email inbox were on his first day as AGS president and CEO, representing just how far he has come.



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CEO SPECIAL PREVIEW - INCREDIBLE TECHNOLOGIES

RECOGNISED BY MERIT

From humble beginnings to a major player in the gambling industry, Incredible Technologies CEO Elaine Hodgson talks to Iqbal Johal about her intriguing journey with the amusement and casino games supplier

"I got here in a very odd way," admits Elaine Hodgson, CEO of Incredible Technologies. "I started the company 35 years ago with nothing and grew it, and now I'm the CEO of a major slot machine company because I hung on for 35 years."

But Elaine Hodgson has done so much more than just hang on. To take a fledgling software design company from her basement to a leading coin-op and casino games manufacturer deserves enhanced credit.

Although she wasn't wrong that her route to the top of the gaming industry was unusual. So how did a university degree in biochemistry lead her to build a well-established casino and slots supplier from scratch?

"My degree led me to computer programming and I was doing programming at a chemistry job which I didn't like, so I got an opportunity to

work with a company that made amusement video games," Hodgson tells *Gambling Insider*.

"My thought was I would take that opportunity to learn more about programming then somehow go back to chemistry. But I liked the games industry so I never looked back."

The forward-looking trajectory took Hodgson to an amusement games company that had to close its doors during the US economic hardship in the early 80s.

But out of difficulty comes opportunity.

Hodgson and her partner Richard Ditton then decided to start their own company in 1985 and the Incredible Technologies you see today is a result of that.



MAKING YOUR OWN LUCK

Jordan Levin, SG Digital CEO, speaks with Owain Flanders about his Midwestern roots and role in the development of Scientific Games' digital arm

"A lot of people always talk about luck," explains straight-talking SG Digital CEO Jordan Levin. "But I am a big believer that luck is a fallacy. You make your own luck. It's at that intersection between preparation and hard work."

Throughout my discussion with him, it's clear that it's his unrelenting work ethic that sets him apart from others in the industry. It's this dedication that's seen him construct Scientific Games' digital arm from the ground up over the past 14 years.

Levin has dedicated his entire career towards the growth of Scientific Games in one form or another, from joining WMS Gaming in 2006 to becoming SG Digital CEO in 2018.

Within that time, he's always held onto one aim – to get the absolute best out of himself and his team in whatever role he takes on.

It's with this leadership that SG Digital has gone from strength to strength over the past few years.

The supplier has taken significant market share in regions all over the globe, most notably the US, Canada and Europe.

With its OpenSports and OpenGaming solutions, the company has rapidly built one of the most respected brands in the industry, both in sports betting and gaming.

As we look forward towards the rest of 2020 and into 2021, it seems that growth is far from slowing down, despite the significant obstacles that may have been thrown in its way.



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CEO SPECIAL PREVIEW - IGT

TOGETHER AS ONE

Renato Ascoli, IGT CEO Global Gaming, speaks about the current state of business and decisions to ensure its competitive edge, including reorganising the company into two global business units

What was IGT's trajectory going into 2020 based on the results of 2019?

IGT started 2020 with notable business momentum. We had strong performance throughout 2019 and a solid Q1 2020 prior to the worldwide closure of casinos and gaming halls that commenced in March.

In gaming, the strength of our core video portfolio, video poker sales, specialty market opportunities and the expansion of our PlaySports footprint in the US were among the many factors that fueled IGT's 2019 performance.

Also, IGT's Lottery performance was driven by solid same-store sales growth, winning new lottery contracts, significant contract extensions, and the global expansion of digital lottery.

How soon did you recognise the seriousness of the pandemic?

IGT recognised the gravity of the COVID-19 pandemic very early on. Given IGT's global footprint, we had

employees, customers and operations, particularly in Italy, experiencing the intensely negative impact of the pandemic well before the seriousness of the situation was fully understood and accepted by many.

As a company, IGT took quick and decisive action and created six crisis management workstreams to address the following: employee protection, business continuity, customer engagement, cost-savings initiatives, scenario planning and liquidity/cash preservation.

These proactive actions continue to protect the safety and wellbeing of our internal and external stakeholders, and are fundamental to IGT's solid balance sheets and positive free cash flow.



GUEST COLUMNIST



PETER BASSILL
CEO, HEDGEHOG SECURITY

Bassill discusses the latest cyber security threats, including an example where a gaming operator was completely compromised

Gaming as an industry has always been and remains at the forefront in the fight for leading information and cyber security practises.

Online gaming also represents a step-change in the adoption of technology practises enhancing the user experience. But this all comes with a cost.

Over the years, the gaming industry has learnt a lot from other high-risk sectors such as finance and banking. Threats have not stayed the same, though, and constant evolution of security remains paramount. As information and cyber security has improved over the years, attackers' methods have evolved. Some of the attack evolutions are new, never before seen attacks. And some of these are reimagined cyber attacks from an older time.

In today's climate, where a significant number of businesses have moved staff to a remote working model, the threats have moved from targeting the core offices to targeting home networks. It is a matter of simplicity. Why attack a hardened business when there is a weak and squishy link?

SO WHAT ARE THE CURRENT THREAT VECTORS?

There are several new avenues we have seen recently. These include attacks against home IoT devices such as android-based TVs, console games systems and the like. Attacking computers like these are significantly easier than attacking corporate devices. If a criminal can gain access to the home network, often they can persist there for an extended period. The attacker then has more time to break into the corporate device or use the network connection to access corporate systems.

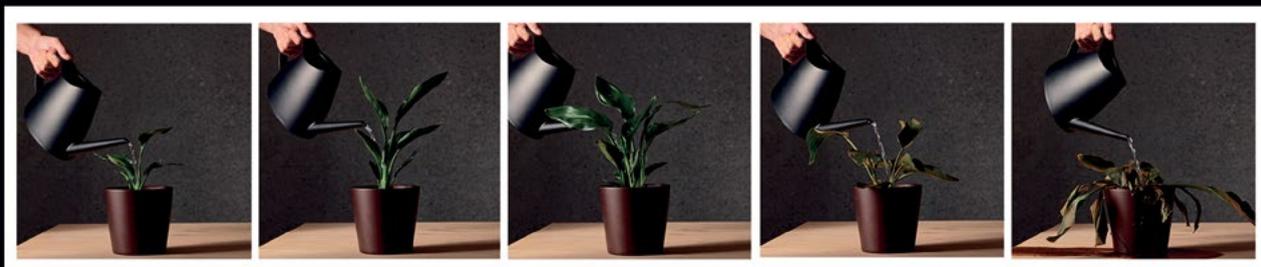
In addition to the home network attacks, there is an increase in phishing emails and malware delivery by the mobile device. The attacker has been targeting the user with great success to date, and there is no sign that this is slowing down.

AN EXAMPLE

In a recent attack simulation, we were able to achieve a complete compromise of a gaming operator through precisely this method. The IT team supplied a typical business laptop. The laptop was placed within a testing network and connected to the operator's VPN.

We then connected to the test network and attempted to break in. During this engagement, we identified some problems. The first was that the laptop, while fully patched, had some in-house written applications.

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One of these was a simple chat application used for customer service. That simple chat application was exploited to allow us a connection into the laptop and subsequently through the computer and onto the corporate network.

Often it is not the way you would expect that is used to gain access. Attackers have time on their hands, and that is very evident in the home network attacks.

THREE KEY MITIGATIONS

The first essential mitigation – awareness – has not changed. Keeping end users up to date on emerging attacks is fundamental. Especially with phishing and more targeted technical attacks, it is the user who will notice something wrong first. Fostering an environment where notification and alerting is supported, even if the user did click something, will always give the maximum return on investment for information and cyber security.

The second critical mitigation is to test and fix. Many businesses will test their security. Addressing the findings is the money shot.

Regular testing of systems and applications is essential, as is testing the business processes. While many operators will routinely test their technical systems, internally developed applications and the business processes that run the operation need reviewing too.

The third mitigation is tracking. Gaming operators need to monitor and review their attack surface and monitor what is exposed. In the same way, many operations will check the sentiment of mass social media posts; the manner in which the business systems reveal themselves on the internet is essential.

Each of these three mitigations helps every business reduce their exposure and likelihood of simple attacks.

Peter has more than 26 years of Information Security experience and is the cyber security adviser to a number of organisations and CISO's spread across the globe, helping them maintain an appropriate risk appetite and compliance level. His passion is ensuring all his clients stay as safe and secure as they can be.

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