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# WEEK 42

## FRIDAY 16 OCT 2020

### FIRST 15 OPERATORS RECEIVE GERMAN SPORTS BETTING LICENSES IN WATERSHED MOMENT

BANCO

COMING SOON:

5<sup>TH</sup> NOVEMBER



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## THIS WEEK

- Shop closures in UK
  - GVC reports Q3
- September sports betting up in West Virginia
- DraftKings joins IBIA
  - GC CEO's plea to financial sector
- Twin River buys Bally's brand
- Legal news in China, Japan

### GUEST COLUMNIST & INTERVIEW:

- Stephan van den Oetelaar, CEO, Stakelogic
- Clarion Gaming, Ice Africa

# WEEK 42

## FRIDAY 16 OCT 2020

### FIRST 15 OPERATORS RECEIVE GERMAN SPORTS BETTING LICENSES IN WATERSHED MOMENT



The Darmstadt Regional Court in Germany has finally issued the nation's first federal sports betting licenses after a long process of regulation beginning in 2012. The 15 licenses were awarded on 9 October, with a small number of operators confirming the news in press statements since.

GVC Holdings, Tipwin, Gauselmann Group and Novomatic are among the list of those to confirm their licenses. German sports betting giant Tipico was also awarded a license, while Bet365 too made the list.

GVC, owner of Bwin, SportingBet, Ladbrokes Coral and Gamebookers, announced it had been awarded a total of four sports betting licenses.

In a statement, GVC CEO Shay Segev said: "The award of these licenses is great news for GVC, bringing the clarity and certainty that we have long sought for sports

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# THIS WEEK IN NUMBERS

## 3

Complaints filed against Profit Accumulator Ltd, which the Advertising Standards Authority upheld, regarding socially irresponsible Facebook posts and website text



## \$1.2bn



Cost of the project to build a collection of music-based hotels across the US for Universal Music Group, with the first UMUSIC hotel and casino to be located in Biloxi, Mississippi

## 14

People arrested after police uncovered an Indian Premier League (IPL) betting racket in five different areas of India, linked to illegal betting on cricket matches played during the 2020 season



## 1 December

Bank Australia is banning all gambling and gaming transactions being used on credit cards for its customers, coming into effect from December



betting in Germany. Combined with the recent Tolerance Policy, we can now look confidently to the future.

“The much-anticipated regulation of online gaming in Germany re-enforces GVC’s position as the most globally regulated and responsible operator in our industry.”

The terms of the license allow a wagering limit of €1,000 (\$1,181) per month, which can be increased to €10,000 if certain criteria are met. Until the customer verification process is complete, there will be deposit restrictions on the account, and the maximum annual bonus set for a player is €100.

Although the licenses have been issued with immediate effect, their terms are not yet officially agreed upon. According to a statement from GVC, the expected implementation date is in the early part of 2021. The operator forecasted that once implemented, these terms would reduce group EBITDA by as much as €40m (\$51.7m) per year.

Gauselmann Group’s Malta-based subsidiary, Cashpoint, also received a license to host both online and land-based sports betting in Germany.

Gauselmann founder and management board spokesman, Paul Gauselmann, expressed his delight at acquiring the license. He said: “Back in 2014, my corporate group more than satisfied all of the requirements for the first licensing process and emerged as number one from the examination of this extensive process.

“Unfortunately, it has taken until today to end this state of legal uncertainty. However, it gives me all the more pleasure that we are now finally the first to be license holders.”

Meanwhile, after Tipwin also received a license, Ivica Batinic and Damir Böhm, managing director and head of legal for the company respectively, released a joint statement in which they expressed their relief that the long-standing legal uncertainty had ended.

The pair described it as “the first step towards a real and responsible regulation of sports betting in Germany.”

Similarly, Hesse Minister of the Interior Peter Beuth said the approval of Germany’s first sports betting licenses was “the end of a long stalemate in Germany’s regulation of gambling” and a “historic day” for the country.

Germany’s process of sports betting regulation stems back to 2012, when the country’s 16 federal states approved an Interstate Treaty on Gambling. This aimed to open up Germany’s regulated sports betting market.

Despite this, it was only in March last year that a final consensus was reached over the country’s sports betting regulation.

The process was delayed even further in April 2020 after complaints surfaced from Austrian betting operator Vierklee claiming the procedure was not transparent or non-discriminatory. The Darmstadt Administrative Court ordered the suspension of the licensing process, but this was later overruled.

After many delays, it is expected that the online German market will be regulated from July 2021.

**GI Verdict:** From the comments of company executives and German lawmakers, it is evident that the journey towards a regulated sports betting market has been a long and difficult one. Now, it is important for the country’s regulators to learn from the mistakes and successes of some of its European neighbours.

There is certainly great merit in the responsible gambling focus of Germany’s established licensing terms; however, it’s also important that the regulator is as clear as possible in its requirements.

In Sweden’s first year of re-regulation, we saw operators struggle to understand how to meet licensing terms, resulting in a huge number of transgressions and fines. Operator executives blamed this mainly on a lack of transparency from the Swedish Gambling Authority, and the speed at which operators were expected to introduce such measures.

Hopefully, with clear guidelines and a substantial period of time before measures must be implemented, this is something that can be avoided in the German market.

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## SEK 150m



Enlabs has received approval from the Estonian Competition Authority to complete its takeover of Global Gaming, after putting forward an offer (worth \$17m) for the remaining shares of a company it already holds a 67% stake in

## 30%

Amount Kindred Group has committed to reduce business travel by 2023 to help reach energy-saving targets set by the Paris Agreement on climate change



## CASINOS AND BETTING SHOPS CLOSE IN LIVERPOOL AS COVID-19 RESTRICTIONS RE-INTRODUCED

This week, the UK Government announced that casinos and betting shops in Merseyside would close from 14 October as part of further measures aimed at stopping the spread of the coronavirus.

On 12 October, Prime Minister Boris Johnson announced a new three-tier system of restrictions in England, applying to each region across the country depending on the risk of transmission.

Tier one consists of regions with the lowest rates of infection, facing the basic national rules that currently apply, such as the rule of six, and pubs and restaurants closing at 10pm.

The highest level of restrictions where transmissions are rising highest is tier three, with the Liverpool City Region – Liverpool, Knowsley, Sefton, Wirral, St Helens and Halton – the only region so far placed here.

As a result, all casinos and betting shops were forced to close on Wednesday 14 October, along with gyms and leisure centres. Pubs and bars were also required to close, except those serving meals, and households will be unable to mix indoors or outdoors.

The new measures will be reviewed every month, and follow Scotland's announcement last week that saw casinos, along with pubs and restaurants, closed in central Scotland from 9 October until at least 25 October.

The news followed a rise in the number of coronavirus cases in England, which saw nearly 14,000 confirmed positive tests recorded on Monday 12 October.

**GI Verdict:** For England's casino and retail betting industry, the latest restrictions will come as another major blow, only increasing concerns over its future.

Betting shops have been open since 15 June after shutting in mid-March, with casinos only reopening their doors on 15 August. Since then, operators have struggled to mitigate losses imposed by the lockdown period.

Unfortunately, the worst seems yet to come for the UK industry as cases continue to rise across the region. Although Merseyside is the only tier-three area currently, it is likely we will see other areas follow suit in the coming weeks.

# \$165.6m

The total Ohio's casino and racing industry posted in revenue for September, a 6% year-on-year rise and the third consecutive month the state posted record figures



# 14 October



England defender Kieran Trippier missed England's UEFA Nations League match with Denmark on Wednesday to attend a Football Association hearing into his alleged breach of betting rules, dating back to July 2019

## GVC DESCRIBES "STRONG PERFORMANCE" IN Q3; NGR UP 12% Y-O-Y

GVC Holdings, owner of Ladbrokes Coral, Foxy Bingo and Partypoker, has described its "strong performance" for Q3 2020.

The operator saw net gaming revenue (NGR) increase 12% year-on-year for the period from 1 July to 30 September 2020.

Although exact figures are only released for full-year reports by the operator, its revenue increase can be attributed to the strong performance of online, with NGR up 26% for the segment.

GVC said online gaming volumes remain ahead of pre-COVID levels, while online sports wagers were up thanks to a busy schedule following the return of major sports leagues.

The operator also saw continued growth in Australia, where NGR was up 64% year-on-year.

Although the pandemic caused the temporary closure of all GVC's UK and European land-based operations, all properties are now open and operating within 10% of pre-COVID volumes, according to the organisation.

As a result of the growth of BetMGM in Q3, GVC has increased its expectations for full-year net revenue in the US to \$150m – \$160m.

Commenting on the potential for further COVID-19 restrictions, CEO Shay Segev said: "While the risk of further restrictions as a result of COVID-19 mean that we remain cautious on the short-term outlook, in the longer term, we are confident of being able to continue delivering sustainable growth for all our stakeholders."

**GI Verdict:** Although 2020 has proven difficult for GVC's retail operations, the operator has clearly been able to mitigate those losses with digital success.

Moving forward, it seems GVC's US venture, BetMGM, could prove more vital than ever for the company as it continues to take greater market share in active states for both sports betting and online gaming. For the year-to-August 2020, total US sports betting GGR was up 33% year-on-year, while online gaming rose 203%. This market is becoming increasingly valuable – something of which GVC will be well aware.

**RAMSES' REVENGE**

COMING SOON: 28TH OCTOBER

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# HYPER BURST

## ERUPTING OCTOBER 15TH



### THE WEEK IN QUOTES

*"We're delighted to announce this new partnership with Cardiff City Football Club and look forward to getting behind the club's push to bring Premier League football back to the Welsh capital."*

**SVP, head of B2C, Guy Cohen, speaking after operator 888sport signed a deal to become EFL Championship club Cardiff City's first training wear sponsor and global betting partner**

*"If we were to get sports bettors into the legal market, advertising is essential. It's going to help educate customers about their options in the regulated legal market. That said, we know what can happen when advertising is not regulated, as those familiar with the European market would be aware."*

**American Gaming Association (AGA) senior director, strategic communications Cait DeBaun, speaks to Gambling Insider about educating customers**

### WEST VIRGINIA SEES CONTINUED IMPROVEMENT IN SPORTS BETTING AND ONLINE GAMING FOR SEPTEMBER

The return of the National Football League (NFL) meant a big boost to sports wagering in West Virginia for September, resulting in nearly \$77m in handle.

That figure was up more than 90% from August, when total handle was slightly more than \$40m.

The majority of handle came via mobile wagering, at more than \$59m. That was an increase of 90% from the \$31m in mobile handle for August.

Revenue from sports betting jumped 133% from August, up to \$4.6m for September.

Total handle, mobile handle and revenue all set records, state officials said.

William Hill launched operations in West Virginia on 4 September. The company has a partnership with Mountaineer Casino and Racetrack in New Cumberland.

On the online gaming front, September handle was \$75m, an 89% increase from August, while revenue was \$2m, up 242% from the previous month.

The Mountain State launched online gaming in mid-July, so September was only the second full month of operations.

DraftKings was the initial operator, but has since been joined by BetMGM. NetEnt recently agreed a partnership with BetMGM to supply online slots products in the state.

BetMGM is operating in West Virginia via the Greenbrier Resort in White Sulphur Springs, while DraftKings is partnered with Hollywood Casino at Charles Town.

**GI Verdict:** The demand for online betting and the fact all four major US sports leagues took place in September, has helped West Virginia post such healthy figures. The National Basketball Association (NBA), National Hockey League (NHL), Major League Baseball (MLB) and the NFL, were all in action during the month, along with US Open tennis, meaning there was plenty of activity for locals to get stuck into.

States which allow online betting, like West Virginia now does, have managed to be the most profitable during a period that has seen the land-based sector struggle.

This could well provide the recipe for further, long-term success moving forward in the US.

*“We are very proud to have been selected by William Hill US. Our Live Casino solutions have been instrumental to make William Hill’s Live Casino a stand-out offering in regulated European markets. We very much look forward to achieving the same high levels of success for William Hill in the US.”*

**Johan Nordstrom, CEO Malta and chief commercial officer for Evolution, comments on the supplier’s new deal with William Hill, to supply live casino content in the US**

*“Today, we announce that our founder, Bernard Marantelli, has made the decision to step down from his role as CEO of Colossus. Bernard is leaving Colossus in good hands as David O’Reilly, our COO since day one, has agreed to succeed him.”*

**Sports betting firm Colossus Bets confirms its change in CEO**

## DRAFTKINGS BECOMES LATEST IBIA MEMBER

DraftKings has joined the International Betting Integrity Association (IBIA) aimed at protecting the integrity of professional sports.

The US-based fantasy and sports betting company will share information on suspicious betting with other IBIA member operators, to help strengthen the sports betting integrity body’s global monitoring and alert platform.

Following the acquisition of SBTech, DraftKings powers sports betting for more than 50 operators covering more than 15 regulated US and global markets, and its clients will be able to benefit from IBIA’s platform via DraftKings.

The operator-run IBIA aims to protect its members from corruption through collaborative action, and its monitoring and alert platform acts as an anti-corruption tool which detects and reports suspicious activity on its members’ betting markets.

IBIA CEO Khalid Ali said: “The addition of DraftKings’ sportsbook trading platform provides a significant boost to IBIA’s already extensive global regulated sports betting market and customer monitoring capabilities.”

DraftKings chief compliance officer

Tim Dent added: “The company places the protection of its clients’ businesses, consumers and sporting events from corruption at the forefront of our corporate strategy. This agreement provides DraftKings’ private operator sportsbook clients with unparalleled trading and risk management protection.”

In April, the IBIA reported 61 incidents of suspicious betting activity for Q1 2020, representing a 36% quarter-on-quarter rise and a 65% year-on-year increase.

**GI Verdict:** At a time when responsible gambling and sporting integrity is more important and relevant than ever, DraftKings joining the IBIA seems a very timely and positive move.

Given the influence and market share the operator holds in the US, the move will only help the IBIA clamp down on suspicious betting activity, particularly during a period where operators are being urged to do more to promote a safer industry.

This is certainly another step in the right direction and can hopefully lead to a decrease in betting fraud, after an alarming rise in suspicious activity earlier this year.



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5%

GVC Holdings  
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1%

DraftKings  
47.56 USD



11%

Evolution  
715.60 SEK



4%

Twin River  
24.05 USD



7%

## GAMBLING COMMISSION CEO: FINANCIAL SECTOR CAN HELP REDUCE GAMBLING HARM

Gambling Commission CEO Neil McArthur believes the financial sector can play an important part in reducing gambling harm.

Referencing the Commission's ban on credit card gambling, implemented in April, the CEO said the regulator is already taking an active role towards preventing problem gambling.

But McArthur believes a "multi-sector partnership approach" will be much more effective in cutting to the root of the issue.

He discussed his ideas at the Money and Mental Health Policy Institute's virtual conference for financial service professionals.

The Commission CEO said: "We want to work in partnership with the financial sector to find innovative ways to reduce gambling-related harm.

"We all have a part to play to protect vulnerable consumers. The Gambling Commission has already banned gambling with credit cards, as evidence showed that it would reduce the risk of gambling harm to consumers.

"That was an important step, but there is always more that can be done.

"The financial sector has an important role to play. We have already seen the introduction by banks of gambling blocking software, together with the use of data to support customers affected by problem gambling."

**GI Verdict:** With over two million adults across Britain facing a damaging impact on their mental and financial wellbeing due to gambling, change is certainly needed.

Having already made strides in reducing problem gambling through a credit card ban earlier this year, the Gambling Commission is following that decision with further action, but just how effective is it?

Working in collaboration with the financial sector will be beneficial to all parties involved, and will allow a holistic view of customer habits to help reduce and eventually prevent gambling harm.

## TWIN RIVER PURCHASES BALLY'S BRAND



Soo Kim, chairman of Twin River Worldwide Holdings (TRWH), has bought the rights to the Bally's name for \$20m.

According to the New York Post, Kim plans to rebrand TRWH properties (11 casinos and the company's headquarters) using Bally's name. There are also plans to launch a sports betting site using the new brand.

Bally Entertainment used to be a big name in the leisure sector.

It ran an amusement park chain and was behind some of the more popular arcade games.

Its assets included the world-famous Six Flags and Bally Total Fitness, while it also ran the video game company that produced Pac-Man and Space Invaders.

Currently, there are two casinos that bear Bally's name: one is in Atlantic City and was purchased by Soo Kim for \$25m, the other is located in Las Vegas and is still owned by Caesars Entertainment.

Based on the purchase agreement, Caesars won't have to rename its Vegas property, even if any present and future rights to Bally's name now belong to Soo Kim.

"This is an opportunity for us to revive a brand that is synonymous with American gaming," said Soo Kim.

"We appreciate Caesars giving us a chance to use a brand they really weren't utilising."

In addition to Bally's Atlantic City property, TRWH also purchased Jumer's Casino & Hotel in Rock Island for \$120m and Montbleu casino in Lake Tahoe.

**GI Verdict:** Based in Lincoln, Rhode Island, TRWH now owns gambling properties across six states, so chairman Soo Kim can be backed for great success with his latest acquisition.

The co-founder of hedge-fund giant Standard General is well on his way to building a huge gaming empire across the United States, and he has been making the most of current global conditions by buying casinos on the cheap.

Unlike many others in the industry, Twin River's basic, regional casinos have been surviving due to the presence of keen gamblers, as opposed to conference goers and families.



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## NEW LEGAL AND REGULATORY DEVELOPMENTS IN CHINA AND JAPAN



China's Standing Committee of the National People's Congress is working to amend criminal law to include more defined views on cross-border gambling activities.

China News Service reported that the agency has reviewed the laws involving overseas casinos and mainland citizens, and the act of "organising and soliciting by casinos abroad" will be criminalised.

The report by the news service didn't state the specific penalties for the new crime or when the proposed law will come into effect.

There's also no clear definition of what is considered to be 'cross-border'. The agency stated that cross-border gambling caused a large outflow of capital and seriously damaged "national image and economic security."

Elsewhere, two former Chinese gambling operator advisers have been found guilty of bribing a Japanese lawmaker.

The Tokyo District Court has sentenced Masahiko Konno to two years in prison, and Katsunori Nakazato to one year and 10 months. Both sentences have been suspended for three years.

The pair were charged with bribing Tsukasa Akimoto, a former member of the ruling Liberal Democratic Party, in an attempt to lobby for a casino license for its Chinese entity 500.com Ltd under the liberalised gambling laws in Japan.

Konno, 49, and Nakazato, 48, reportedly paid a total of 7.6 million yen (\$72,000) in bribes between 2017 and 2018.

The bribery included travel expenses to China and Hokkaido, with Konno and Nakazato given information on gambling legislation in return.

The defendants' lawyers pleaded for leniency on the grounds that 500.com Ltd had retracted its bid to enter the Japanese casino market, along with the suggestion that the bribery was not directly linked to the bid itself.

Presiding Judge Toshihiko Niwa said the duo "severely undermined the impartiality of duties and public trust in a large-scale project promoted by the Government."

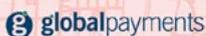
Akimoto was also recently charged with offering money to both Konno and Nakazato in a bid to receive favourable false testimony.



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## MISSOURI FALLS IN SEPTEMBER

Missouri gaming revenue fell 7.49% to \$129.369m for September as casinos have been operating at 65% capacity.

That was slightly better than August's 12.91% year-over-year decline.

Twin River's recently acquired Casino KC, formerly Isle of Capri, led growth with 5.41%.

KANSAS CITY METRO	SEPTEMBER REVENUE (M)	YEARLY CHANGE (%)
Casino KC (TRWH)	\$5.356	+5.41
Harrah's North KC (CZR)	\$14.701	+0.40
Argosy (PENN)	\$12.429	-2.70
Ameristar (BYD)	\$13.593	-12.11
Total Kansas City Metro	\$46.079	-3.93

ST. LOUIS	SEPTEMBER REVENUE (M)	YEARLY CHANGE (%)
Ameristar (BYD)	\$20.397	-5.27
Lumiere Place (CZR)	\$11.540	-6.11
River City (PENN)	\$16.406	-11.12
Hollywood St. Louis (PENN)	\$14.933	-21.13
Casino Queen E. St. Louis IL	\$4.220	-48.40
Alton Belle IL (PENN)	\$1.789	-51.14
*Total St. Louis Metro	\$69.284	-16.58
Total St. Louis, MO	\$63.276	-11.15

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### MISSOURI FALLS IN SEPTEMBER

ELSEWHERE	SEPTEMBER REVENUE (M)	YEARLY CHANGE (%)
Mark Twain (Affinity)	\$2.816	+4.39
Century Caruthersville (CNTY)	\$3.100	-0.37
Cape Girardeau (CNTY)	\$4.982	-1.74
St. Jo's Frontier (Affinity)	\$3.208	-4.85
Isle of Capri Boonville (CZR)	\$5.909	-7.89
State total	\$129.369	-7.49

MULTIPLE PROPERTY COMPANIES	SEPTEMBER REVENUE (M)	YEARLY CHANGE (%)
Affinity	\$6.024	-0.75
Century Casinos	\$8.082	-1.22
Caesars	\$32.150	-3.59
Boyd	\$33.990	-8.13
Penn National	\$43.768	-12.75

\*\*Includes Illinois properties

## GUEST INTERVIEW



**Stephan van den Oetelaar, CEO, Stakelogic**

### **Tell us about your background and how you became Stakelogic CEO?**

My educational background is that I have a bachelor's in electrical engineering and I hold a master's degree in business administration. In my professional career, I started several software companies, making billing systems for utility systems in the past, and asset and risk management software for the financial industry. And when my two oldest sons, who are now 18 and 19, were very small, I started some daycare centres in the area where I live. I still have those – which is convenient because my younger son has an 18-month-old now! In 2018 I bought Stakelogic and appointed myself as CEO of the company. I would say before 2018 I didn't know much about the online gambling industry. But I got interested in the industry because of its size and the way the industry is developing very rapidly. I wouldn't be surprised if in the next three years this industry doubles in size. Stakelogic was the perfect opportunity for me to enter the industry. Since the takeover, we've grown from 25 staff to 100 in four countries. When I bought the company, we had four clients – now we have 500 operators on board and the revenue grew by 500%. So far I'm very happy.

**What is the best route to becoming a CEO? For some it's through marketing, others finance, others operations.**

I took the easy route – I started my own companies and appointed myself as CEO from day one! But as a next step in somebody's career, first of all you

should question yourself and ask why you want to be a CEO. Because if your heart is really with sales or marketing or finance and technology, you should realise that the CEO is involved in everything. To become a CEO, your professional background is not that important, because most of the professional tasks are done by someone else anyway. To fulfil the CEO role, you need to understand the industry you're operating in and have a clear vision how the industry will develop in the next five years. Because I think for the CEO it's important to set goals for the company, define the strategy and create the conditions for the company to execute the strategy. So they could come from finance, marketing and sales – I don't think it makes a lot of difference.

### **What are the biggest priorities for online slot companies right now, bearing in mind the effects of the pandemic and the new normal for customers?**

I think game studios will change more to professionally managed software factories. I think we will create games that are easily maintainable because of new operating systems coming up all the time and demands we get from regulators. I think also time to market will be more important for game studios. For developing a game concept, you should really take your time. But once a game is specified, in a three-month period you should build, test a game and get it to market.

I think the gambling industry will get more professional. But I think the pandemic, to be honest, brought us a lot of extra players and revenue. It merely sped up a process which is already going on – that the online gambling industry is taking over from the land-based industry to a large extent. I also think the online industry will, at a certain point, be bigger than the land-based industry ever was.

**To see Stephan's full GI Huddle interview, [click here](#)**



CLARION  
GAMING

*ICE Africa, the African gaming industry's largest B2B event, returns this October and takes place digitally for the first time over 27-29 October*

Africa is a patchwork of different regulatory frameworks and player habits, so we're delighted to share some of the insights gained through months of research into the African gambling framework.

It's impossible to start anywhere other than COVID-19 and its impact on the continent.

While many countries imposed strict lockdown measures, we are now seeing these eased, allowing tourism sectors to open up again. This in turn is allowing casino operators, among the hardest-hit by the pandemic, to welcome back customers.

However, with significant uncertainty and the prospect of a resurgence of the virus, COVID-19 remains a key point of discussion for African operators. It's for this reason that one of ICE Africa's lead sessions brings together speakers from Sun International, the European Casino Association, South Africa's hospitality association Fedhasa and suppliers such as Asia Live Tech to discuss these issues. But the session will also look forward and set out a path for brick-and-mortar gaming's recovery.

It's important to highlight reasons for optimism for the sector, and alongside the reopening of land-based venues, COVID-19 has prompted a shift in perception for online gaming. Lockdowns have highlighted the value of an operator's reach extending beyond the casino floor, and this will naturally be a key focus of the show.

This increased demand for online gaming regulation will be discussed by Nkoatse Mashamaite, director of gambling law and policy at the South African Department of Trade and Industry, in the ICE Africa keynote. Regulators from Nigeria,

Botswana and Ghana will also tackle this topic in another headline panel.

While day one provides exclusive insights on the regulatory picture and land-based recovery, the second day shifts focus to operational considerations, namely product development and marketing strategy. It's important to stress that there is no one-size-fits-all solution for the continent, and with each market requiring different approaches, suppliers such as Kiron Interactive, Betgenius and MelBet discuss the challenges and opportunities this localisation requires.

In addition, with a rise in online gaming, customer acquisition is a key focus for those expanding into digital, and day two will see the introduction of iGB Africa into the main ICE Africa agenda for the first time. These carefully curated sessions will look at the role of affiliate marketers in Africa by discussing the growing opportunity and the importance of value and volume to success in African markets.

Another key takeaway from our research was the industry's huge interest in Africa as a potential opportunity for greater expansion. As uptake of new verticals and channels accelerates, there are more opportunities for domestic and international businesses to expand their footprint across the many diverse markets. This not only includes international operators moving into countries, but local operators moving beyond their current borders.

I have therefore tailored day three to focus on what comes next. This aims to highlight new opportunities (including those that have perhaps not had the same attention as high-profile markets) through panels on new products and strategies for a successful launch.

All of this exclusive content will be live streamed, offering viewers expert insight and thought leadership in an online environment.

The online event platform will allow attendees to easily view sessions, take part in discussions with industry leaders, customise their schedule and chat face-to-face via video calls with those who are eager to learn and do business.

While 2020 has been a trying year for the industry, our work on ICE Africa has shown us that it's likely to slow, rather than stop, growth on the continent. There are huge opportunities on offer. It's up to the gaming industry to take them.

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