



WEEK 43

FRIDAY 23 OCT 2020

NEW JERSEY SETS US SPORTS BETTING HANDLE RECORD WHILE PENNSYLVANIA POSTS STATE BEST

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The dashboard displays several key metrics and promotional offers:

- COMPLETED STATUS BARS:** A donut chart showing the distribution of bonus statuses: Cashed out, Forfeited, Unsettled, and Expired.
- GRANTED COUNT PER TRIGGER TYPE:** A bar chart showing the number of bonuses granted across different trigger types.
- GRANTED BONUS PER TYPE:** A pie chart showing the distribution of bonus types: Cashback, Freebet, Standby, Freebonus, and Tournament.
- COMPLETED STATUS AUTO FOR PROGRAM:** A table listing specific bonus programs and their details.

ID	NAME	STATUS
4048484810101010	100% up to €200 Casino Welcome Bonus	Standard
4042020202020202	100% up to €200 Sports Welcome Bonus	Standard
0030003000300030	Free Spins in Crystal Queen	Freebet
1000001000001000	77% Lucky Bonus up to €77000 400	Freebet
007000700000	Congratulations €100 Casino Bonus	Standard

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- FIRST TIME DEPOSIT 100% BONUS**
- WELCOME BONUS 100% up to €200 + 200 FREE SPINS**
- 200% BONUS 100 FREE SPINS CLAIM NOW**

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NEW JERSEY SETS US SPORTS BETTING HANDLE RECORD WHILE PENNSYLVANIA POSTS STATE BEST

THIS WEEK

- Macau casinos project huge Q3 losses
- William Hill's EBITDA warning
- Gamesys reports Q3 results
 - New Colossus Bets CEO speaks exclusively to *GI*
 - GGA Las Vegas next week!

GUEST COLUMNISTS:

- Stian Enger Pettersen, CEO, CasinoEngine
 - Relax Gaming



Pennsylvania and New Jersey both posted record state sports betting handle for September.

New Jersey set the record for the highest-ever monthly sports betting handle in the US.

According to data from the New Jersey Division of Gaming Enforcement, the state collected \$748.5m in sports betting wagers.

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THIS WEEK IN NUMBERS

6%

Year-on-year increase in the amount staked with French operator Française des Jeux for Q3 2020, to €4.4bn (\$5.16bn)



£2.29m

The number of voluntary industry donations received by UK charity GambleAware between April and September this year (\$2.96m)



\$30,000

During a VSIN podcast this week, host Gill Alexander explained how he had been denied \$30,000 in winnings from the Westgate Las Vegas Resort and Casino



€208.9m

Revenue for Spain's online gaming market for Q2 2020, a drop of 4% from the previous quarter, but up 18% year-on-year (\$244.9m)

-6%

The decline in Q3 revenue for Tabcorp year-on-year, which the company attributed to venue closures due to COVID-19



The statistics show that more than 90% of wagers were made via mobile devices, with much of the betting concerning the recent US Open in golf, as well as the US Open in tennis.

But other sports were also important in reaching the all-time record, with Major League Baseball (MLB), the National Hockey League (NHL), the National Basketball Association (NBA) and the National Football League (NFL) all playing an integral role.

The \$748.5m total eclipses the previous US monthly tally of \$667.9m, which came in August 2020 and was also recorded by New Jersey.

The Garden State has now taken in more than \$3.28bn in sports betting handle this year.

Sports betting gross revenue rose 19% from last September, up to \$45.1m, while total gambling revenue for September was up 7% from last year, to \$323.3m.

The repeal of the Professional and Amateur Sports Protection Act (PASPA) in 2018 saw New Jersey become the third state to legalise widespread sports betting, following in the footsteps of Delaware and Nevada.

The latter has recorded the three highest handle months after New Jersey. In 2019, Nevada recorded figures of \$614.1m and \$596.7m in November and March respectively, having generated \$581m in November 2018.

Meanwhile, retail and online sportsbooks in Pennsylvania posted a state-record handle of \$463m for September.

September handle grew 138% year-on-year and far surpassed the \$365m of wagers placed in August.

Despite the enormous handle, revenue only reached \$6.3m, down from the \$14.9m posted in September 2019.

Heave promotions and winning favorites are suggested factors behind low revenue levels. Overall, total gaming revenue for the state was up 1% year-on-year, to \$284.2m.

Online wagering made up approximately 90% (\$414m) of the September handle, led by FanDuel Sportsbook at Valley Forge Casino, with \$168m in online bets.

The DraftKings Sportsbook at Meadows Casino was the nearest competitor, with online handle of \$117m.

Dustin Gouker, lead analyst for PlayPennsylvania, said: "With the beginning of the NFL season, a full schedule of baseball, and the NBA and NHL playoffs, there may never be such a confluence of sporting events again. Like New Jersey, Pennsylvania has created a well-rounded market that can drive significant action on every major sport. That market dynamic was able to bear fruit in September in a way that may never be fully possible again."

GI Verdict: States that offer mobile and sports betting in the US were able to capitalise on the "proverbial feast" of sports activity that took place in September, as William Hill US CEO Joe Asher described it. And you can see why, with all four major leagues, as well as Major League Soccer (MLS), NASCAR, US Open golf and US Open tennis, all taking place during the month.

When you factor in the pent-up demand for sports betting after major sport was suspended for several months from March, and that the vertical is only just over two years old in the legal market, perhaps it's unsurprising we've seen such record handles posted.

The New Jersey market continues to grow from strength-to-strength, cementing itself as one of the leading gaming markets worldwide, and the acceleration to online has been strongly reinforced by the fact more than 90% of sports betting took place on mobile devices in both the Garden State and Pennsylvania. Again, it's relevant to point out that those states who still haven't legalised both sports betting and online gaming in the US, will continue to lag behind the rest.



COMING SOON: 28TH OCTOBER

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A NEW GAMING ERA



12

Malaysian police arrested 12 people for taking part in an illegal online gambling syndicate in Jalan Batu Kawa, Sarawak

48%

Evolution saw revenue of €140m (\$165.9m) for the third quarter of 2020, a rise of 48% year-on-year



\$60m



Supplier NetEnt earned SEK521m (\$60m) in revenue for Q3, a rise of 18% year-on-year

MACAU CASINOS EXPECTED TO SUFFER \$823M EBITDA LOSS FOR Q3

According to a Bloomberg survey of analyst estimates, Macau casinos will see a combined EBITDA loss of around \$823m for the three months ended 30 Sep.

Participants in the survey, which involved seven brokerages, estimated that Macau's seven casino operators will most likely report negative EBITDA for Q3.

The largest year-on-year decline in company EBITDA is expected to be reported by SJM Holdings, with the operator projected to report a fall in the region of 171%. Meanwhile, in terms of property EBITDA, MGM China and Wynn Macau are expected to see drops of 150% and 144% respectively.

For six months, revenue for Macau's casino industry has fallen 90% from 2019 levels as the region struggles to overcome limits imposed by the COVID-19 pandemic.

Although a travel bubble has been created to allow visitors to reach Macau, visitor arrivals during the Golden Week holiday were still down 84% year-on-year.

Earlier this week, Macau's Government Tourism Office predicted a 90% decline in

visitor numbers for the entire of 2020. The region has already seen an 87% drop in visitors for the first eight months of the year.

Just over 3.57 million visitors have entered the territory so far this year, with the Autumn Golden Week maintaining the year-on-year trend of decline.

Macau casinos' gross gaming revenue for the first nine months of 2020 totals almost MOP38.61bn (US\$4.8bn), an 83% decrease from the same period in 2019.

GI Verdict: Unsurprisingly, Macau's losses in terms of both EBITDA and visitor numbers have been a direct result of limits imposed due to concerns regarding the coronavirus pandemic.

Current measures have been affecting people from all over the world in their bid to travel to the region, with visitors from China expected to present a certificate for freedom of COVID-19 infection.

It's a worrying time for Macau, one that looks set to continue given that citizens remain concerned about the pandemic and the setbacks which could be generated by the easing of measures.



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THE WEEK IN QUOTES

“As a leader in operating lotteries across India and other jurisdictions, Sugal & Damani has shown its deep interest to operate the UK National Lottery since 2007; when it participated and also got selected as a reserve bidder by qualifying all Required Standards like propriety, technology, player protection, channel management, financial capability, etc. We are looking for a fair and open competition that the GC has initiated; we are very much in the game, we are in the final stages of creating a strong consortium of credible partners, the details of which will be shared in due course.”

Kamlesh Vijay, group CEO of Sugal & Damani, comments on the Indian operator's entry into the UK National Lottery tender process

WILLIAM HILL CLAIMS LOCAL LOCKDOWNS COULD COST COMPANY £2M

William Hill has revealed a 9% drop in third-quarter revenue in its latest trading update, stating that local lockdowns could cost the company £2m (\$2.6m).

The group reported “good progress across all divisions,” but stated that £2m could be lost through retail amid the latest coronavirus measures implemented by the UK Government.

A statement from the operator's trading update read: “With respect to further local lockdowns we estimate that, on average, the closure of 100 shops for four weeks would reduce EBITDA by c.£2m, excluding the benefit from any job support schemes for which the group may be eligible.

“At the current time, c.10% of our retail estate is located in regions where the local COVID-19 alert level is classified as ‘very high,’ as defined by the latest Government disclosure.”

The UK has recently seen a number of new restrictions introduced as COVID-19 cases rise.

This week it was announced Greater Manchester would enter a Tier 3 lockdown which will see betting shops close Friday.

Lockdowns have, however, traditionally witnessed a boost in online performance across the industry.

Despite the decline in revenue and the worries regarding new lockdown measures, William Hill CEO Ulrik Bengtsson expressed his delight at the company's performance in recent months.

He said: “We are very pleased with the trading performance of the group, which has been borne out of the commitment, resilience and hard work of our teams across the business I could not be prouder of them.”

GI Verdict: The future of the UK's retail and casino betting industry remains unstable, with the latest Government measures providing further worry for both firms within the sector. Operators have struggled to compensate for losses imposed by the initial lockdown, so further local lockdowns could prove detrimental.

William Hill is, however, subject to a £2.9bn takeover by Caesars Entertainment, and despite the company reporting a 9% drop in Q3 revenue, it seems to be functioning more effectively than some of its competitors.

GAMESYS REPORTS 31% RISE IN Q3 REVENUE TO £190M

Gamesys Group has reported strong performance for Q3 as its total revenue rose 31% year-on-year to £190m (\$245.7m) on a pro forma basis. The group's success reflects the growth in its "active customer base."

Gamesys revenue increased in Asia and the US, with similar progress in Spain and the UK.

Monopoly Casino in Spain was quoted as "one of the most successful new brand initiatives in the history of the group." The operator is hopeful about the start of Q4, while Gamesys continues to promote responsible gambling and increased player awareness.

The operator said "approximately one third of total monthly actives in the UK in Q3 had set a deposit limit" and "over half of all sessions on our UK sites do not include wagering."

Lee Fenton, Gamesys Group CEO, said: "We have performed extremely well during Q3, with strong organic revenue growth, an increasing active customer base and solid progress made across both our core and growth markets globally.

"Looking ahead, our portfolio of established and trusted brands, complete ownership of our technology platforms and a strong balance sheet, underpin our ability to thrive in the long term."

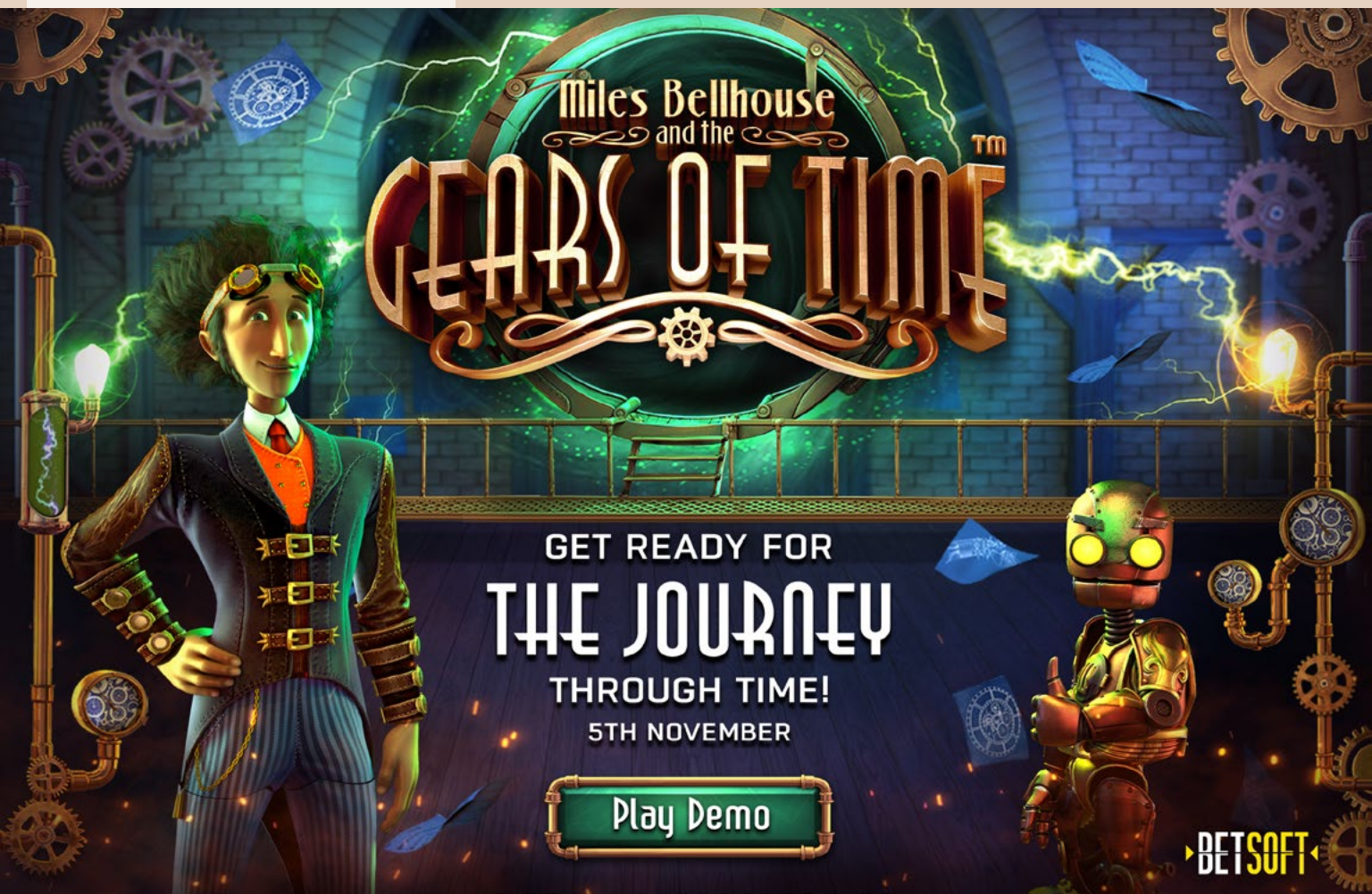
Its Q3 results follow a 27% pro forma revenue rise for H1 2020, with adjusted EBITDA rising 75% to £95m and adjusted net income up 68% to £68.1m, for the first half of the year.

GI Verdict: These results are further evidence of how online-facing operators and suppliers are benefiting from a spike in online activity brought about by the coronavirus pandemic.

The suspension of live sport in March led to a rise in online casino play, among other verticals, especially during the height of lockdown. Gamesys, which focuses on online casino and bingo-led brands, is another operator to benefit. Having said that, the results are in keeping with momentum it has built from last year, when revenue for full-year 2019 rose 35% year-on-year to £415.1m. The operator is very much on course for another stellar year, as we approach the last quarter.

"From the beginning of the pandemic, betting shops and casinos have played their full role in the national effort to tackle this virus. It is therefore hugely disappointing that as they are starting to get back on their feet again, those venues in Merseyside and Lancashire have had the rug pulled from under them. And given the inconsistencies between the approaches in Liverpool and Lancashire when it comes to gyms and leisure centres, it gives the impression that the people who make these decisions don't care about jobs in betting shops and casinos."

Betting and Gaming Council CEO Michael Dugher comments on the introduction of local lockdowns in Merseyside and Lancashire, which have led to the closure of betting shops and casinos



COLOSSUS BETS CEO EXCLUSIVE: SUCCEEDING BERNARD MARANTELLI A 'NATURAL TRANSITION'

"While gaming's responsible reopening is well underway, the sustained economic damage has jeopardised our ability to sustain jobs and drive much-needed tax revenue that will be essential to our nation's economic recovery. The bipartisan Hospitality and Commerce Job Recovery Act will enable the gaming industry to retain employees and jumpstart non-gaming elements of our business, like meetings and conventions, which account for the majority of our revenue in markets like the Las Vegas Strip."

American Gaming Association president and CEO Bill Miller praises new legislation that aims to aid hospitality industry recovery amid the COVID-19 pandemic

Colossus Bets' new CEO David O'Reilly speaks exclusively to *Gambling Insider* following his appointment to succeed Bernard Marantelli.

Congratulations on your appointment – can you tell us a bit about how the move materialised for you?

Bernard has been the CEO and founder from day one, but he effectively emigrated with his family to Madrid over the summer and we had been discussing the impact that might have on the day-to-day running of the business. It looks like in the current climate his ability to travel at all is increasingly uncertain. He's also somebody who's a better hands-on manager than remote manager. So we thought now's the time to recognise that I am probably doing more of the day-to-day running of the business and have been for the last 3-6 months anyway, so on that basis we agreed it was the right time to transition.

How involved will Bernard remain in the business, or is that yet to be seen?

The areas where he's particularly strong

are his network of business development relationships, in particular in pari-mutuel, tote businesses globally. He understands that product really well as a player and he's very attuned to the personalities in the tote betting space. So he will definitely continue to help us on a biz dev footing. And, generally, the product – he is the originator of cash out and our syndicates features. They are probably our two biggest innovations and they're his ideas, his brain child, so he will still feed us ideas with product advice and recommendations.

What are your immediate priorities and objectives as the new Colossus Bets CEO?

There's an element of business as usual without sounding clichéd. Because I've been part of the day-to-day running for some time; I've been here since day one – it was the two of us at the very outset effectively. I'm not planning to radically change anything because, if I thought we were fundamentally on the wrong path, I would have made my views clear long before now.



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Las Vegas Sands
48.92 USD  7%

William Hill
282 GBp  3%

NetEnt
90.00 SEK  2%

Gamesys Group
1,188 GBp  9%

Betsson AB
67.80 SEK  4%

GLOBAL GAMING AWARDS JUST ONE WEEK AWAY: GET SET FOR THE AFTER SHOW AND G2E NETWORKING

The Global Gaming Awards Las Vegas 2020 are officially just one week away. Now in their seventh year, the Awards have quickly become the most trusted Awards in the industry and have gained respect amongst sector heavy-weights.

Winners of all 12 categories will be revealed during our Global Gaming Awards show at 1.30pm Eastern Time on Tuesday 27 October, in conjunction with the Virtual G2E Las Vegas.

You can watch the show on the G2E platform, live on LinkedIn and also YouTube.

The action won't stop there, however, as *Gambling Insider* will additionally host an after show party, where we'll speak to representatives from each winner live.

We encourage all shortlisted companies to search for Global Gaming Awards on Skype and add us on the platform, in case they win and we need to call them.

Completing a historic treble, we will then host a virtual networking

session on industry developments across Europe, as part of G2E.

The networking session will take place at 4.15pm Eastern Time, so be sure to join in once you've watched the 2020 edition of the GGAs.

Gambling Insider COO Julian Perry said: "Even though this year's Awards ceremony is virtual, we have even more content for viewers to get excited about. Not only will we present the Awards ceremony itself, we will host an after show where we will call the winners after they find out if they've won during the show.

"Our G2E networking will also be a great chance for attendees to unwind while learning more about the European gaming sector."

The Global Gaming Awards Las Vegas are powered by *Gambling Insider* and *Gaming America*, while all votes are independently adjudicated by KPMG and BetConstruct is the Awards' lead sponsor.



LOUISIANA FALLS AGAIN

Louisiana gaming revenue fell 22% year-on-year to \$180.491m in September.

However, that decline was an improvement vs. August's 25%.

Caesars' Isle of Capri in Lake Charles remained closed in September, due to damage sustained from Hurricane Laura in late August.

Like the month prior, Routes, Truck Stops and OTBs was the only segment that grew its revenue for the month.

LOUISIANA – SHREVEPORT / BOSSIER CITY

LOCATION	SEPTEMBER REVENUE (M)	ANNUAL CHANGE (%)
Margaritaville (PENN)	\$14.950	+23.64
Horseshoe (CZR)	\$12.552	+2.97
Boomtown (PENN)	\$3.832	-4.35
Louisiana Downs (CZR)	\$3.445	-4.86
El Dorado (CZR)	\$6.820	-14.64
Sam's Town (BYD)	\$4.442	-16.17
Diamondjacks (Legends)	nil	-100.00
SP/BC Total	\$46.040	-3.62
*Same store	\$46.040	+1.87

LOUISIANA - LAKE CHARLES / VINTON

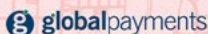
LOCATION	SEPTEMBER REVENUE (M)	ANNUAL CHANGE (%)
Delta Downs (BYD)	\$5.799	-51.75
Golden Nugget	\$8.827	-58.55
L'Auberge (PENN)	\$7.094	-67.84
Isle of Capri (CZR)	\$0.090	-98.67
LC/Vinton Total	\$21.811	-64.91



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LOUISIANA – NEW ORLEANS

LOCATION	SEPTEMBER REVENUE (M)	ANNUAL CHANGE (%)
Fair Grounds (CHDN)	\$2.999	-13.00
Boomtown (PENN)	\$7.945	-17.44
Treasure Chest (BYD)	\$6.499	-22.05
Harrah's (CZR)	\$13.748	-42.98
New Orleans Total	\$31.191	-31.48

LOUISIANA – ELSEWHERE

METHOD	SEPTEMBER REVENUE (M)	ANNUAL CHANGE (%)
Riverboat – Amelia Belle (BYD)	\$2.537	-28.15
Routes, Truck Stops, OTBs	\$54.452	+13.43
State Total	\$180.491	-22.00
*Same store	\$180.491	-21.13

LOUISIANA – BATON ROUGE / CENTRAL LA

LOCATION	SEPTEMBER REVENUE (M)	ANNUAL CHANGE (%)
Hollywood (GLPI)	\$4.552	+19.11
L'Auberge (PENN)	\$12.947	+6.90
Evangeline Downs (BYD)	\$5.704	-12.29
Belle (CZR)	\$1.257	-36.94
BR/C.LA Total	\$24.461	+0.12

LOUISIANA – MULTIPLE PROPERTIES

OPERATOR	SEPTEMBER REVENUE (M)	ANNUAL CHANGE (%)
Boyd	\$24.981	-30.00
Caesars	\$37.912	-33.12
Penn National	\$46.768	-21.91

GUEST COLUMNIST



STIAN ENGER PETTERSEN,
CEO, CASINOENGINE

Pettersen provides a brief history of casino bonusing

Just over a decade ago, the modus operandi for most operators was to offer first-deposit cash bonuses followed by recurring reload bonuses. The first to attract new players, the latter to keep them happy and loyal. And should players lapse, an attractive one-off bonus to invite them back.

The name of the game was to give the most irresistible bonus offers to stand out from a crowd of similar offers, which typically translated into larger and larger percentages and amounts. While a few operators applied some basic segmentation to their player database, others simply offered the same reloads across the board.

Many learned the hard way that this was not a cost-effective way to reward players, no matter how much traffic it drove back, or however big the deposit spike got after yet another weekly reload cycle started.

For one, bonus strategies focused on awarding money alone sounded like a dinner bell to the bonus hunters

lurking in the shadows. Operators also learned that a crude and somewhat aimless cash bonusing scheme was not the optimal way to reward valued players.

Today, the principles are, of course, the same. Acquisition. Retention. Reactivation. But the strategies and tools have evolved immensely over the last 10-15 years and one of the biggest game-changers is how we capitalise on our data.

The technology to recognise customer behavioral patterns and dynamically segment players has been around for years, allowing operators to put in place much more targeted strategies. There are different types of players and at different stages in the life cycle, which calls for different types of measures.

Predictive segmentation even helps in identifying future behaviour: which players are likely to churn, who are potential VIPs, or prospective bonus abusers. Operators with this insight can make educated decisions and take appropriate and proactive actions before opportunities are lost or threats materialise.

Another example of today's data-driven online gaming landscape is event-driven, real-time bonusing. Performing the right action at the right moment is a must-have to cater to the new generation of consumers, who are used to the instant gratification the online and tech industries have brought to them.

Gamblers are no different. If promised five free spins by playing 50 rounds on video slots, the player expects that reward to be granted instantly when the objective is accomplished. 'Play today and get rewarded tomorrow' is obsolete.



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Patience is a thing of the past. The possibility to offer event-driven, real-time rewards has opened doors for gamification. There is an ever-growing amount of industries that embrace gamification with excellent results.

Gamification is literally everywhere. Via smartphone apps, people are motivated to work harder and smarter, reach their savings goals with their bank, do math homework, and exercise – all driven by gamification. And while your audiobook app only lets you level up and unlock some badges (still strangely gratifying!), gamification in the online gaming industry is full of very much tangible rewards.

Getting a reward is great, but for a true player, getting a reward in a competition against other players adds to the thrill. Climbing the leaderboard of a tournament enriches the user experience beyond playing the actual casino games.

The same is true for challenges presented to the player that may unlock a reward, or a new challenge, or both. Players can set out on a journey where they decide which path to take, choosing between different missions with different objectives and rewards – all while levelling up to gain access to new perks and challenges.

Gamification done right increases player engagement and loyalty, which in turn improves retention rates, and eventually results in the ultimate goal of all operators – increased lifetime value.

The industry has truly come far in how we engage with and enhance the user experience of our players.

But as tech-driven industries go, the best part might be that in 15 years we'll look back at what we did in 2020 and shake our heads at the lack of sophistication.

The banner features a blue and green network diagram background with nodes and connecting lines. At the top left is the 'global gaming expo' logo with 'GZE' in a blue diamond. To its right is the 'PRESENTED BY AMERICAN GAMING ASSOCIATION' logo. The main text is centered and reads: 'Industry-focused Networking Session: The Global Perspective'. Below this is the date and time: 'Tuesday, October 27, 2020 4:15 PM - 5:00 PM EDT'. At the bottom left, a blue button with white text says 'REGISTER NOW'.

RELAX GAMING

The Relax Gaming team argues that the games of the future are community-driven

RELA:::
G A M I N G

The future of video, affiliation and gaming is evolving, paving the way for community-driven slots, according to CasinoGrounds' CEO Tobias Svensen and Relax Gaming CPO Simon Hammon. In a fireside chat for iGaming Next, where the two explored different facets of what they believe the industry is looking for in online casino games, the collaborators agreed that putting players front and centre of design is changing the face of content development.

For Svensen, the streaming and affiliation was borne out of a pressing need for genuine advertising. At a time when the media was polluted with numerous 'top 10' lists that reflected commercial packages more than genuine reviews, the community was craving transparency.

With the growth of mobile in surrounding industries came the rise of consumer and supplier connection. People had greater access to those designing their products and sought the truth amid the promotional noise. This development soon trickled into online gaming, with streaming emerging as a new way to give genuine and real-time gameplay feedback, most prominently for high-volatility content of which the majority of players were still wary.

The subsequent shift in player behaviour was stark, with less-experienced customers becoming more willing to experiment with new titles as their understanding increased. Streamers showcased the true potential of content, shaping how players play and suppliers create. Today, we continue to learn from the honest feedback they provide.

LISTEN TO YOUR AUDIENCE

From a supplier's point of view, streaming provided answers to long-term, burning questions. Hammon explained how tapping into this channel presented his team with unfiltered representation of the audience interacting with their product for the very first time.

Insight into player behavior was now directly available to them, straight from the horse's mouth, albeit among a more experienced but discerning player segment.

"In a market where restrictions are getting tougher and competition is only getting fiercer, all you can hope for is a game that will resonate with your players. No supplier should think they know what players want; the player is always changing," said Hammon. He went on to explain that, in the online gaming industry, suppliers must be able to leave their ego at the door, put their own vision aside and be willing to adapt to what players are saying. "Designers who don't listen to their community will ultimately fail," he said. Streaming provides a feedback channel that has the potential to reap so many rewards for players and producers alike.

DELIVER ON YOUR PROMISES & LET YOUR CUSTOMERS DRIVE YOUR CREATIONS

The rise in affiliation of this kind has also brought about a more genuine side to the sector and suppliers therefore need to be able to show their numbers hold true. "Delivering on your promises is key in such a cut-throat industry. You need to be able to show that the game will pay, and quickly," Hammon said.

While there is no magic formula or proven technique for pleasing players and getting to the crux of consumer behaviour, hearing what they have to say is as good a place to start as any.

"In a market where restrictions are getting tougher and competition is only getting fiercer, all you can hope for is a game that will resonate with your players. No supplier should think they know what players want; the player is always changing"
– Simon Hammon

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