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# WEEK 06

*FRIDAY 7 FEB 2020*

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GLOBAL GAMING AWARDS  
LONDON 2020 WINNERS

A trophy consisting of a dark blue, rectangular base with a globe on top. The globe is silver and shows the continents. The text 'GGA LONDON 2020 WINNERS' is embossed in gold on the front of the base.

**GGA  
LONDON  
2020  
WINNERS**

**2**

**1**

**3**

Lead Partner

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## THIS WEEK

- **A balanced Tom Watson talk**
  - **Spotlight Sports on Racing Post rebrand**
  - **Yggdrasil CEO makes bold prediction**
- GUEST COLUMNIST:**
- **Mikael Hansson, Global CEO, Entertive**

# WEEK 06

## FRIDAY 7 FEB 2020

## GLOBAL GAMING AWARDS LONDON 2020 WINNERS REVEALED



The winners of this year's Global Gaming Awards London were announced at an afternoon tea ceremony at the Hippodrome Casino.

Bet365 and Red Tiger Gaming enjoyed a particularly successful afternoon, claiming two prizes each.

Bet365 defended its titles in the Online Sports Betting Operator of the Year (sponsored by Scientific Games) and Affiliate Programme of the Year categories.

Red Tiger Gaming won Casino Product of the Year with its Daily Drop Jackpots Network and its Chief Executive, Gavin Hamilton, won Chief Executive of the Year (sponsored by 1xBet).

A total of 16 categories were decided by a Judging Panel of more than 50 industry experts.

The Global Gaming Awards are powered by *Gambling Insider* and the Lead Partner for the Awards was BetConstruct.

Below is a full breakdown of the winners, runners up and third-placed companies in each category.

**BETCONSTRUCT**

*As the Lead Partner of Global Gaming Awards 2020,  
BetConstruct would like to congratulate  
ALL THE WINNERS!*



Lead Partner

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# WINNERS LONDON 2020

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Adjudicated by



## BETTING SHOP OPERATOR

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**WINNER:** Paddy Power

**RUNNER UP:** Fortuna Entertainment Group

**THIRD:** Ladbrokes



## ONLINE SPORTS BETTING OPERATOR

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**WINNER:** Bet365

**RUNNER UP:** Sky Betting & Gaming

**THIRD:** 888 Holdings

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## RETAIL SUPPLIER

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**WINNER:** Scientific Games

**RUNNER UP:** SBTech

**THIRD:** Betradar



## ONLINE SPORTS BETTING SUPPLIER

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**WINNER:** SBTech

**RUNNER UP:** Scientific Games

**THIRD:** Kambi

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## CASINO

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**WINNER:** Casino de Monte-Carlo  
**RUNNER UP:** Hippodrome Casino  
**THIRD:** Casino Barcelona



## ONLINE CASINO

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**WINNER:** LeoVegas  
**RUNNER UP:** 888Casino  
**THIRD:** PlayOJO

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## CASINO SUPPLIER

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**WINNER:** Novomatic  
**RUNNER UP:** Scientific Games  
**THIRD:** Aristocrat



## ONLINE CASINO SUPPLIER

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**WINNER:** Evolution Gaming  
**RUNNER UP:** Greentube  
**THIRD:** NetEnt

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## CASINO PRODUCT

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**WINNER:** Red Tiger Gaming - Daily Drop Jackpots Network  
**RUNNER UP:** Big Time Gaming – Who wants to be a Millionaire Megaways  
**THIRD:** Betsoft Gaming – Gold Canyon



## PAYMENT SOLUTION

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**WINNER:** Trustly  
**RUNNER UP:** Paysafe Group  
**THIRD:** Worldpay



## CORPORATE SERVICES PROVIDER

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**WINNER:** Continent 8 Technologies  
**RUNNER UP:** BettingJobs  
**THIRD:** Gaming Laboratories International



## ONLINE BINGO OPERATOR

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**WINNER:** Jackpotjoy  
**RUNNER UP:** Svenska Spel  
**THIRD:** Tombola



## ONLINE POKER OPERATOR

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**WINNER:** PokerStars  
**RUNNER UP:** 888Poker  
**THIRD:** Unibet



## AFFILIATE PROGRAMME

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**WINNER:** Bet365 Affiliates  
**RUNNER UP:** Kindred Affiliates  
**THIRD:** LeoVegas Affiliates



## CORPORATE RESPONSIBILITY PROGRAMME

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**WINNER:** Paf  
**RUNNER UP:** Danske Spil  
**THIRD:** Kindred



## CHIEF EXECUTIVE

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**WINNER:** Gavin Hamilton – Red Tiger Gaming  
**RUNNER UP:** Peter Jackson – Flutter Entertainment  
**THIRD:** Martin Carlesund – Evolution Gaming

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# THIS WEEK IN NUMBERS



**18 February**

The Competitions and Market Authority's invitation to comment ends on 18 February, as part of its investigation into the Flutter Entertainment – Stars Group merger

**£377.5m**

Rank Group grew its underlying net gaming revenue by 10% year-on-year for the six months ended 31 December 2019, to £377.5m (\$490.2m)



SBTech has extended its partnership with Argyll Entertainment, signing a new five-year deal

## BALANCED TOM WATSON SPEECH OFFERS OUTSTRETCHED ARM TO GAMING FIRMS

As Tom Watson addressed an audience full of gaming executives on the first morning of ICE London, here was a far more balanced approach than we've seen from him in the past.

Perhaps this was because Watson was addressing the Great British gaming industry directly, rather than having his quotes sensationalised by journalists from national newspapers.

Either way, he began by stating an important distinction – one a lot of active politicians fail to make. He stated what to the industry is obvious but to its fiercest critics conveniently ignored: that regulated gambling, when offered correctly and responsibly, offers fun, entertainment and a perfectly acceptable pastime.

Watson separated himself from moral objections to gambling and clarified it is not an 'evil' industry.

He spoke against 'draconian' measures and pitched himself firmly in a position where he wants to work together with the industry. "Very few," in his words, want "total prohibition."

It's worth considering his recent resignation as Deputy Leader of the Labour Party and the fact he was not on neutral territory as contextual drawbacks. You could sense this in the room a little, as not many willingly engaged him in the Q & A.

When Watson was questioned, you could argue he was perhaps a little fluffy. He did not make clear why, for example, the industry would need an independent ombudsman when the Gambling Commission is already considered to be restrictive in its approach towards the sector.

He also didn't necessarily answer the question of why a new Gambling Act is needed when the old Gambling Act still has some secondary powers which could empower the Commission.

Nor did he dismiss the Gambling-Related Harm All-Party Parliamentary Group's recommendation of a £2 (\$2.61) maximum stake for online slots – which, pitching himself as a moderate voice of reason, he certainly could have done.



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**63%**  
Of consumers surveyed by Iovation's 2020 online gaming report deterred from opening an account via a mobile device, because of concerns about security of information

**10**

KPMG, with the support of Continent 8 Technologies, has now published a full report of its landmark 10th anniversary Isle of Man eGaming Summit

**31%**

Suspicious betting alerts in 2019 fell by 31% year-on-year, according to a report from the International Betting Integrity Association



## TAKING STOCK

SHARE PRICES COVER THURSDAY 30 JAN TO THURSDAY 6 FEB (12PM)

Scientific Games  
28.70 USD



+12%

IGT  
14.42 USD



+5%

Playtech  
355.30 GBP



+3%

Evolution Gaming  
310.00 SEK



+3%

Kambi  
127.40 SEK



-3%

But what he did do was praise the new Betting and Gaming Council and highlight valid concerns with game designs. There were no fabricated numbers and no Tracey Crouch-esque claims gambling directly leads to two suicides a week. Instead, he sensibly remarked that if gambling causes harm to just one person, it's one too many.

It's interesting to assess what this address means for the industry moving forward. One on hand, it can be considered an open, outstretched arm from a man who will have enough contacts within Government to actually make a difference.

If the industry can avoid the "rancour" of the fixed-odds betting terminal (FOBT) saga, as Watson once again stated, we can perhaps avoid a similar outcome with online slot limits.

Watson however, has arguably raised what is currently demanded of gaming CEOs. If he is capable of adapting and appearing more balanced, any gaming representative who can't do the same is at risk of being left behind – a remnant of a more archaic approach to gaming regulation.

If the proponents of gambling change are offering reasoned, sensible arguments, the Great British industry should be willing to meet them halfway. As Watson mentioned, it is already showing signs of doing this through its voluntary whistle-to-whistle advertising ban.

Naturally, voices from shocked politicians representing angry constituents – perhaps far less moderate than Watson, as he claims – will always exist in Parliament. But maybe the sector can use Watson's outstretched arm to limit these overly aggressive voices.

Overall, there was no denying his reasoned and inclusive approach. From reputation, this wasn't what was expected.

If the sector can work more collaboratively with Government, regulation may end up not being as restrictive as it once was with FOBTs.

At the same time, if those calling for further regulation are coming across as far more balanced and skilled orators, we'll need the same level of presentation and compromise from the leaders representing gaming.

The stakes, unlike on FOBTs, are as high as ever.

## EXCLUSIVE Q & A: RACING POST TEAM ON SPOTLIGHT SPORTS GROUP REBRAND

After the announcement of its rebrand to Spotlight Sports Group, *Gambling Insider* stopped by the Racing Post office to speak with Louise Agran, Racing Post CMO.

**It's a significant change in direction to rebrand under a new name. What were the main reasons behind it?**

**LA:** It is a big decision and not something we took lightly. We're not just the Racing Post anymore. There are four businesses within the group, including Racing Post, Apsley, ICS Digital and ANZ. As such we felt we needed a name that reflects all of that and reflects that we are no longer just about racing or the UK. We're increasingly diversifying ourselves to sport and data. We are a digital business. We wanted something that allowed us to express more than calling ourselves the Racing Post Group would, for example.

**With an aim of launching the rebrand at ICE London, I imagine it has been a busy few months. How much preparation goes into something like this?**

**LA:** It's quite a big process which we kicked off in July. There are a number of steps to the process. Firstly you audit the businesses in line with your competitors to see where you sit; out of that you produce the brief for a creative agency. We did a naming workshop with a number of people from all over the business. We got into a room and came up with about 500 names – all weird and wonderful. Then we kept cutting these names down. We took some legal advice also on what has been trademarked already; then we got board approval and began creating and designing the brand. It's been a six-month process really.

## THE WEEK IN QUOTES

*"We're thrilled to have finalised this milestone merger with Epic Media and delighted to have the combined experience and expertise of Staffan Lindgren and Ulf Norder on board."*

**Markus Nasholm, Chairman of the Board at QTech Games, on its merger with Epic Media**

*"This is a difficult decision but we have to do it, for the health of our Macau residents."*

**Ho lat-seng, the Chief Executive of Macau, on the closure of all its casinos for two weeks, following 10 reported cases of the coronavirus in the region**

*"Colombia is a really exciting market full of potential and we are delighted to be making our debut at a time when opportunities are aplenty."*

**Habanero Business Development Executive Vera Motto comments on the supplier launching in Colombia for the first time, after widening its partnership with Codere**

## YGGDRASIL CEO: PUBLISHING BUSINESS CAN HELP US REACH €2BN MARKET CAPITALISATION

Ahead of ICE London 2020, *Gambling Insider* caught up with Yggdrasil CEO Fredrik Elmqvist and Head of Publishing Björn Krantz in central London.

On the agenda was the supplier's new Publishing business, which the two executives think can become the gaming sector's next major disruptor.

**This is a very different model to other suppliers in the space – how do you see the industry receiving it? Can you foresee some resistance from companies using a more traditional model?**

**FE:** On the bigger level, we're going to tell people on a global scale we are facilitating globalisation. Here, that means different studios and partners using similar tools, focusing on what's important in their market. We're taking away the cumbersome burden of compliance and regulation. This is what we believe will be a driver – and we think people will endorse this.

**BK:** I would say for the conservative businesses who offer some resistance – this is exactly what the industry needs and has wanted for quite some time. Why? Because when all the regulation is happening and when it becomes more problematic for anyone to drive scale in their own business operations, they need to do more, not less, in a very scalable way. So the whole Publishing concept helps scale businesses. That helps others drive more incremental revenue, which can be reinvested into the balance sheet. We see it as a win-win situation.

**What is the five-year plan for Yggdrasil's Publishing business?**

**FE:** For us to be on the stock market, with a €2bn (\$2.2bn) valuation, maybe more. Every billion counts. It is not a forecast but a vision I believe could be doable if everything goes as well as it can do with Publishing; with 50 Franchise partners around the world delivering 100 games a month.

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## STRIP REVENUE, VISITATION RISE

Despite a continuing decline in baccarat revenue, the Las Vegas Strip grew 4.53% year-on-year for December, helping Nevada grow 5.79% to \$1.058bn.

The Strip benefited from lucky play of table games and slots, which exceeded last year's hold percentages. Revenue would have declined 4.71% if hold was the same as last year.

Downtown Las Vegas and the Las Vegas locals performed even better, with revenue up 6.8% and 13.64% respectively, which may bode well for Boyd and Red Rock Resorts.

Sports betting revenue fell 17.64%, but handle pushed Nevada's total handle to a record \$5.319bn, beating last year's record by 6.2%.

Visitation to Las Vegas grew 6.1% for December, while full year visitation rose 1%, to 42.524 million.

December Strip RevPAR rose 12.5%.

MARKET/PROPERTY	REVENUE (M)	% CHANGE
Nevada	\$1.058 (B)	+5.79
Las Vegas Strip	\$591.829	+4.53
Clark County	\$917.553	+6.56
Downtown LV	\$63.219	+6.80
North LV	\$28.667	+23.14
Laughlin	\$33.012	+1.12
Boulder Strip	\$82.080	+20.53
Mesquite	\$11.310	+2.24
Balance of County	\$107.435	+6.78
Las Vegas locals market	\$218.182	+13.64

## COMPONENTS OF STRIP PERFORMANCE:

MAJOR STRIP SEGMENTS:	REVENUE (M)	% CHANGE	% WIN	
			2019	2018
Blackjack	\$82.121	+32.16	15.48	11
Baccarat	\$73.690	-27.34	9.02	8.75
<b>Total games</b>	<b>\$271.232</b>	<b>-1.09</b>	<b>12.92</b>	<b>11.07</b>
Slots	\$320.597	+9.80	7.99	7.75

## DROP/HANDLE

MAJOR STRIP SEGMENTS:	2019	2018	% CHANGE
Blackjack	\$530.497	\$564.955	-6.10
Baccarat	\$816.962	\$1.159	-29.52
<b>Total games</b>	<b>\$2.099 (B)</b>	<b>\$2.477</b>	<b>-15.26</b>
Slots	\$4.012	\$3.768	+6.50

## RACEBOOK AND SPORTSPOOL

MARKET/PROPERTY	REVENUE (M)	% CHANGE	% WIN	
			2019	2018
NEVADA				
Race Book	\$2.282	-20.85	16.48	16.55
Football	\$23.698	-24.89	6.94	9.42
Basketball	\$11.158	+44.35	6.50	4.57
Baseball	-\$1.723	N/A	-6,318.94	10,770.82
<b>Sportsbook Total</b>	<b>\$36.327</b>	<b>-17.64</b>	<b>6.36</b>	<b>7.85</b>
CLARK COUNTY				
Racebook	\$2.022	-18.99	16.48	16.62
<b>Sportsbook Total</b>	<b>\$32.698</b>	<b>-14.99</b>	<b>6.20</b>	<b>7.38</b>

MARKET/PROPERTY	REVENUE (M)	% CHANGE
Washoe County	\$71.960	-2.06
Reno	\$52.442	-2.77
Sparks	\$11.595	+2.05
North Lake Tahoe	\$2.150	-7.17
Balance of County	\$5.773	-1.43
South Lake Tahoe	\$18.169	+8.10
Elko County	\$26.036	+5.59
Wendover	\$17.495	+5.50
Balance of County	\$8.542	+5.76
Carson Valley Area	\$9.320	-1.92
Other areas	\$14.564	+2.97

## GUEST COLUMNIST:



**MIKAEL HANSSON,**  
GLOBAL CEO, ENTERACTIVE

*Hansson explains why the US market is all about conversion and why operators must pick up the phone if they are to succeed at onboarding players*

North America is one of the most exciting online gambling markets in the world, providing huge potential across sports betting, casino, poker, bingo and lottery.

Domestic and international operators are putting tremendous resources behind entering the fray with a brand and product fit for purpose.

But with competition so fierce, operators must ensure they stand out from the crowd across all areas, from the games offered to the generosity of bonuses via the marketing methods used.

When it comes to the latter, most online brands have so far focused on new player acquisition, with many launching big-budget, above-the-line campaigns.

While this will undoubtedly help them build out their player base and drive new customers to their sites, the real opportunity lies elsewhere. It lies in conversion.

### THE CONVERSION MARKET

The US market is different to almost every other online gambling market in the world in that most channels already have big client databases.

For example, the majority of states permit land-based casino gambling; land-based operators therefore have thousands of players already active with their brands.

When it comes to online, sports media giants such as theScore and Fox Sports have millions of engaged sports fans hungry to bet on their favourite teams and players.

Then you have operators that offer daily fantasy sports and social casino games; players from these verticals are already comfortable with betting and gambling and wish to do so for real money.

In addition, there are operators that have access to legacy customer databases, perhaps more online poker-oriented, where players can be converted and reactivated.

This presents a huge opportunity for operators that already have large player databases across these channels, so long as they are able to convert them and do so at scale.

The important question, of course, is precisely how they go about doing so.

### THE TELEPHONE IS THE BEST CONVERSION TOOL

Here at Enteractive we believe picking up the telephone and contacting players directly is the most powerful method when it comes to converting them.

This applies to all channels from converting a land-based sports better to an online punter, or a social casino player to one that walks through an operator's bricks-and-mortar casino doors.

This is because the telephone allows operators to build an emotional connection between the player and their brands and to learn more about their wants and needs.

Armed with this information, companies can educate them about other gambling products they offer (online for a land-based player, real money casino for a social casino player etc) and convert them.

There is data to support this, too. Industry insights show the probability of an existing customer buying an additional product is 60-70%, while for a new customer it is as low as 5-20%.

In short players already engaged with a gambling brand, regardless of the channel through which they are engaged, are much likelier to convert.

Phone contact is also the scientifically best-proven way to monitor for gambling addiction risks and ensure a working responsible gaming practice, which is hugely important in a market such as the US.

### LOYALTY IS ULTIMATELY PROFITABLE

Equally, there are other upsides to operators in the US market playing the conversion game and using the telephone to forge human relationships with players.

This approach ultimately makes players feel valued and cared for by the operator; this in turn leads them to remain tremendously loyal to the gambling brand.

Here at Enteractive, we have spent the past 10 years speaking with consumers via telephone and this is why we believe this statistic also applies to online gambling operators.

For those in the fiercely competitive North American market, this approach allows maximising the ROI on new player acquisition, conversion and retention spend.

An interesting aspect of phone-based reactivation and conversion is that churn levels of those customers are materially lower after a phone call, increasing the ROI even further.

This also allows operators to keep their players happy, satisfied, cared for and loyal.

The US is undoubtedly the conversion market; for online operators to win the conversion game, all they need to do is pick up the phone and speak with their players.

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