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WEEK 22

FRIDAY 4 JUN 2021

**GLOBAL GAMING AWARDS
LONDON 2021 FULL
SHORTLIST OUT, AHEAD
OF JUNE 28 CEREMONY**



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THIS WEEK

- **Viva Las Vegas! G2E returns**
- **Viva Las Vegas! Casinos back to 100% capacity**
 - **BT in running for UK National Lottery bid**
 - **Macau GGR up 492% for May**

GUEST COLUMNIST:

- **Shawn Harris, Director of Solutions - Casinos, Omnicco Group**

WEEK 22

FRIDAY 4 JUN 2021

GLOBAL GAMING AWARDS LONDON 2021 FULL SHORTLIST OUT NOW

See Also Page 3
Review: Betting operators battle it out with advert campaigns



AGGREGATION, CONTENT AND DISTRIBUTION



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The industry's most respected and prestigious Awards ceremony is set to take place once again on 28 June. This year's Shortlist has been revealed

The Global Gaming Awards London 2021 are delighted to announce that the full Shortlist is now available to read.

The Global Gaming Awards are the most recognised, reputable and prestigious Awards in the gaming industry, not only because every shortlisted company is nominated for a specific reason, but also because of the fair and rigorous voting process, which ensures winners are truly deserving of their Awards.

The Shortlist was finalised following a period of self-nominations and analysis from the *Gambling Insider* editorial team, as well as the Awards' esteemed Nomination Panel. Shortlisted companies were contacted a couple of months ago, but the full Shortlist has only been made public now.

This year the Awards have 14 categories as the Casino of the Year Award has been suspended due to the Covid-19 pandemic, forcing casinos to remain shut for the better part of 2020. However, a new category has been introduced – Product Launch of the Year, sponsored by Kalamba Games.

There are 10 nominees in each category with the exception of Chief Executive of the Year, which has 25 shortlisted executives. This is the only category that recognises the individual rather than the collective organisation.

This year's Global Gaming Awards London Shortlist recognises over 100 companies across the different categories, and there are quite a few new entrants in the nominees list; such as Scout Gaming Group, AstroPay, Soccabet and FDJ Gaming Solutions. Meanwhile, past winners such as Evolution, bet365, LeoVegas, Continent 8 Technologies will try and defend their titles.

"The Global Gaming Awards honour the best in the business, and this year's event is an example of how we've been able to collectively pull together to showcase, albeit virtually, what should be celebrated," said *Gambling Insider* CEO, Gary Roudette. "Across the 14 categories, every Shortlisted company represents a high standard for others to aspire to."

Vigen Badalyan, Founder & CEO of BetConstruct, the Lead Partner of the Global Gaming Awards 2021, added: "Even in the most trying times, the GGA – with the support of BetConstruct – have delivered the powerfully important and unequivocally impartial Awards to the companies that have fully deserved the acclamations."

The voting process for the Global Gaming Awards London 2021 is currently underway, with 50 industry CEOs choosing the winners and KPMG monitoring the entire process. This year's stellar Judging Panel includes Itai Pazner, CEO, 888 Holdings; Carsten Koerl, Group CEO, Sportradar; Renato Ascoli, CEO Global Gaming, IGT; Tsachi Maimon, CEO, Aspire Global and many more.

Until we can announce the winners virtually on 28 June, it is our absolute pleasure to share the full Shortlist with you,

which can be viewed in full in our Shortlist magazine.

The Global Gaming Awards London are powered by *Gambling Insider*. BetConstruct is the event's Lead Partner and the voting process is independently adjudicated by KPMG in the Crown Dependencies, to ensure full transparency and fairness. Category sponsors include Singular, Nuvei, Digitain, Fast Track, Pronet Gaming, Kalamba Games, Altenar, 1xBet, Elys Game Technology and Connective Games.

BETTING SHOP OPERATOR OF THE YEAR

SPONSORED BY SINGULAR
LAST YEAR'S WINNER:
PADDY POWER

ONLINE CASINO OF THE YEAR

SPONSORED BY FAST TRACK
LAST YEAR'S WINNER:
LEOVEGAS

SERVICES PROVIDER OF THE YEAR

LAST YEAR'S WINNER:
CONTINENT 8

ONLINE SPORTS BETTING OPERATOR OF THE YEAR

SPONSORED BY ALTENAR
LAST YEAR'S WINNER: BET365

CASINO SUPPLIER OF THE YEAR

LAST YEAR'S WINNER:
NOVOMATIC

PRODUCT LAUNCH OF THE YEAR (NEW)

SPONSORED BY
KALAMBA GAMES

RETAIL SUPPLIER OF THE YEAR

LAST YEAR'S WINNER:
SCIENTIFIC GAMES

ONLINE CASINO SUPPLIER OF THE YEAR

SPONSORED BY DIGITAIN
LAST YEAR'S WINNER:
EVOLUTION

AFFILIATE PROGRAM OF THE YEAR

SPONSORED BY ELYS
GAME TECHNOLOGY
LAST YEAR'S WINNER:
BET365 AFFILIATES

ONLINE SPORTS BETTING SUPPLIER OF THE YEAR

SPONSORED BY NUVEI
LAST YEAR'S WINNER: SBTECH

SOCIAL RESPONSIBILITY OF THE YEAR

SPONSORED BY
PRONET GAMING
LAST YEAR'S WINNER: PAF

CASINO PRODUCT OF THE YEAR

SPONSORED BY
CONNECTIVE GAMES
LAST YEAR'S WINNER:
RED TIGER

PAYMENT SOLUTION OF THE YEAR

LAST YEAR'S WINNER:
TRUSTLY

CHIEF EXECUTIVE OF THE YEAR

SPONSORED BY 1XBET
LAST YEAR'S WINNER:
GAVIN HAMILTON

Visit the Global Gaming Awards website for the full details of this year's Shortlist
[CLICK HERE](#)

THIS WEEK IN NUMBERS

AU\$4bn

BetMakers has submitted an indicative proposal to acquire Tabcorp's Wagering and Media business for US\$3.09bn



34

Victoria's royal commission into Crown Resorts has been told one gambler played for over 34 hours straight at Crown Melbourne before they were forced to take a break

7,450

Team members tested by Marina Bay Sands, as well as 800 contractors, for Covid-19



2020

A campaigning MP has called on ITV to suspend all gambling adverts during the upcoming Euro 2020 tournament

\$3m

Thailand's police busted an online gambling operation that reportedly earned \$3m per month. During the raid in Bangkok, 19 people (eight men and 11 women) were arrested



REVIEW: BETTING OPERATORS BATTLE IT OUT WITH ADVERTS

▶ The delayed Euro 2020 campaign is now just around the corner and, as expected, betting brands were quick to launch advertising campaigns – to build momentum around the much-anticipated tournament.

Ladbrokes, Paddy Power and William Hill launched their adverts suspiciously close to each other last week; however, all three showcased something different. Each advert reflects each brand's image differently, while also portraying the same tournament in separate ways.

Kicking off with Ladbrokes, the most unique advert out of the three features 190 drummers, 200 extras and even some visual effects. Ladbrokes has opted to go with a more tension-focused advert, highlighting the emotions football fans go through during a critical moment (such as a penalty). In fact, the whole advert is actually concentrating on what seems to be a decisive penalty; as a player puts the ball down, viewers are met with the energetic sound of drums.

The drum patterns then gradually build in conjunction with the footballer taking the spot-kick and ends with "this time we play together" to unite fans and musicians alike. Ladbrokes wanted its campaign to support the music industry by raising awareness of the challenges more than 700,000 musical professionals faced during the Covid-19 pandemic.

The William Hill and Paddy Power adverts took a different approach. For instance, where Ladbrokes used a heavier and rock and roll backing track from the rock band The Subways, William Hill went with Neil Diamond's Sweet Caroline. The quieter advert looks to explore the betting community in general rather than focusing solely on the Euros, so if you aren't a football fan this may be the advert for you.

Seen in the minute-and-a-half clip is football fans playing 5-a-side, people betting on horses and those watching football and darts with friends. The slogan of this advert is "it's who you play with," as it aims to portray a closer-knit sports

betting group; however, since it isn't Euros-focused, William Hill has missed a chance to go toe to toe with its rivals and launch a football-based campaign.

However, William Hill did say it would be launching a more "international creative" that will go live ahead of the European tournament, so this could allow it to segregate from the other two and gain more traffic.

Last up is Paddy Power. If you've seen a Paddy Power ad before, you know what to expect: it will include the iconic Paddy Power voice-over, some motion shots and overall be quite tongue in cheek.

The latest ad with Peter Crouch has just that; much like the classic Paddy Power advert with Rhodri Giggs, this one has Crouch walking through and making light-hearted comments.

The former footballer walks through crowds of different football fans while discussing betting on the Euros and offering humorous 'tips' like "If your team's not up to scratch just switch to a better one".

And of course, it ends with the traditional Paddy Power voice-over that encourages you to use the brand for the Euros and a last shot of Crouch being berated by fans.

In conclusion, all adverts did a good job of summing up the fan experience, as well as positively displaying betting in sports.

This perhaps has added importance during the delicate current climate, with broadcaster ITV saying it will "significantly reduce" gambling adverts during the Euros to try and help reduce problem gambling during the event.

Overall, William Hill missed an obvious trick by not introducing a Euros campaign alongside its rivals; but as mentioned before this could benefit the operator longer term.

Ladbrokes and Paddy Power show a different spirit around the Euros. While some may prefer the dynamic drummer-based Ladbrokes campaign, we feel Paddy Power has once again perfected a very simple yet effective way to advertise.



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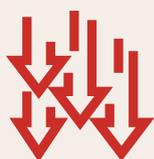
1%

Year-on-year revenue decrease shown in Paf's annual report, to €113m (\$137.2m)

0



Entain-owned betting exchange Betdaq has announced it will take 0% of commissions on all matches during Euro 2020



\$46.7m

Sports betting handle for April in the state of New Hampshire. Wagers were down from \$55.8m in March for a 16.3% decrease

G2E WILL RETURN TO LAS VEGAS IN OCTOBER 2021

The Global Gaming Expo (G2E) will return to Las Vegas for its 2021 instalment, following one year of its virtual format.

Organisers, the American Gaming Association (AGA) and Reed Exhibitions, have formally announced plans to move forward with the show at Sands Expo in Las Vegas, including additional virtual components, between October 4-7.

Korbi Carrison, G2E Event Director, said: "For over 20 years, G2E has been the leader in uniting the global gaming community and we are beyond thrilled to come together this October for the industry's hallmark event."

Meredith Pallante, AGA VP of Global Events, added: "We can't wait to bring the industry back together in Las Vegas for G2E 2021. The industry has shown tremendous resilience throughout the pandemic and being able to gather together again will be another great milestone in our strong recovery."

G2E management conducted a research study in May, where it found

eight in 10 respondents were likely to attend the show if it was held in Las Vegas. Equally, more than 80% of those interviewed said they would "definitely or probably be purchasing products for their company as a result of attending the show."

Due to the Covid-19 pandemic, G2E was forced to take place behind closed doors in 2020.

However, freer travel restrictions, with some casinos in Las Vegas already allowed 100% guest capacity, mean Reed and the AGA are confident of going ahead with the showpiece industry event on the US gaming calendar this time around.

GI Verdict: Everyone needed a return to physical shows, especially in Nevada. Hopefully the trade show can be conducted in a safe environment, although there have been plenty of test events already with large crowds globally (especially within sports) so the outlook is positive.

Viva Las Vegas.

THE WEEK IN QUOTES

“Gambling legislation has remained largely unchanged since it was enacted 35 years ago. As a result, gambling regulation here has not kept pace with industry and technological changes. In my view change is long overdue.”

Communities Minister, Deirdre Hargey, has announced Northern Ireland will look to bring reforms to the country's gambling laws in the coming weeks

“This is an important strategic partnership for Kambi as we continue to expand our footprint in Latin America's growing sports betting market. The ambition shown by NG Gaming to be among the leaders in sports betting matches our own, and we are excited at the prospect of Olimpo.bet going live in time for the Copa América.”

Kambi CEO Kristian Nylén on the supplier's new deal with NG Gaming

LAS VEGAS RETURNS TO 100% CAPACITY

As May turned to June at midnight, Clark County officially removed all capacity restrictions from businesses, setting off a celebration on Fremont Street dubbed Downtown Rocks Again.

The Fremont Street Experience in Downtown Las Vegas brought back its long-shuttered music stages on 1st Street and 3rd Street. Directly after midnight on June 1, two of the area's most popular house bands, Zowie Bowie and Spandex Nation, were able to play for the first time in nearly 15 months.

The free concerts continued from just after midnight until 4am.

Leading up to the big moment, the screens of the Viva Vision Canopy that runs nearly the length of Fremont Street's gaming district featured a countdown clock ticking off the seconds until midnight.

Las Vegas mayor Carolyn Goodman recorded a message welcoming back revellers. The end of restrictions has been in the works for about two weeks, starting with Nevada Governor Steve Sisolak signing a directive allowing all businesses to reopen at full capacity on June 1.

Last week, the Nevada Gaming Control Board told gaming licensees it will rescind all Covid-19 restrictions effective 12:00 am on June 1.

The Bacchanal Buffet at Caesars Palace reopened its doors for the first time in more than a year on May 20, and Circus Circus Las Vegas brought back its Circus Buffet on May 29.

The next step will be the return of conventions and entertainment. The first major conference of 2021 will be the World of Concrete show, coming to the Las Vegas Convention Center June 7-10.

Resorts World Las Vegas is scheduled to open on June 24. The \$4.3bn project has been in development for six years and is the first ground-up resort built on the Las Vegas Strip in more than a decade.

GI Verdict: Vegas was in true celebratory mode with all the announcements that venues can reopen safely.

The return of the Global Gaming Expo (G2E) 2021 as an in-person event in October, meanwhile, is further cause for celebration after a difficult period for the entire industry.

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SISAL PARTNERS WITH BT FOR UK NATIONAL LOTTERY BID

"We hope this measure would not only generate the much-needed revenues in the country but also place the industry under stricter government oversight."

Rodrigo Duterte's Presidential spokesman Harry Roque on the Philippines' plans to pass a bill to set income and gaming taxes on online casinos

"I am very pleased to be working with The Problem Gambling Help Network of West Virginia and happy that this partnership will provide an extra resource and layer of protection for those whose gambling has become a problem for them in West Virginia."

Melissa Etherington, Partnerships Manager at Gamban, on the charity's new deal in West Virginia

Italian operator Sisal Group has partnered with BT as part of its bid for the fourth UK National Lottery licence.

The Milan-headquartered group has lottery and gambling experience in Italy, Morocco, Spain and Turkey, and is a late entrant to the Gambling Commission's competition to hold the fourth UK National Lottery licence.

The race was announced in August 2020, with the winner set to be announced in September this year.

The current licence, operated by Canadian-owned Camelot, is due to expire in 2023. Camelot has run the lottery through three licences since its inception in 1994. Other groups in the running include Sazka Group and Indian lottery operator Sugal & Damani.

"We are delighted to announce our partnership with BT," said Sisal CEO Francesco Durante. "As the UK's leading telecommunications and networks provider, BT has unparalleled understanding of the UK market and its transformative digital expertise, customer-focused approach and

commitment to innovation will ensure our bid will deliver the best possible solution for the UK National Lottery."

The partnership will involve BT advising Sisal on how to combine the best fixed and mobile networks in the UK with the latest tech, in a bid to widen the appeal of the National Lottery.

Dean Terry, MD, Corporate and Public Sector, for BT's Enterprise unit, said: "BT's technology solutions can ensure that the National Lottery maximises the amount of money raised for good causes, while better protecting those players most at risk from gambling harms."

GI Verdict: With the range of groups still in the running, it is a very open and exciting race, and one that will be highly lucrative for whoever comes out on top.

The move from Sisal is certainly an intriguing one, not least because it follows on from Sazka announcing a similar partnership with BT's fellow telecommunications company Vodafone.

The competition is heating up for Camelot, which is genuinely facing the prospect of missing out for the first time.



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Kambi  4%
409.00 SEK

Flutter  2%
13,030 GBP

LeoVegas  3%
40.92 SEK

Tabcorp  1%
5.13 AUD

MACAU GGR UP 492% FOR MAY 2021

Macau's Gaming Inspection and Coordination Bureau (DICJ) has reported gross gaming revenue (GGR) of MOP10.45bn (\$1.31bn) for May 2021, a 492% increase from the prior-year period.

The total was additionally a 24% month-on-month increase from the MOP8.4bn reported in April 2021, and is the highest monthly GGR figure the DICJ has reported in 2021.

Macau has recorded GGR of MOP42.49bn for the first five months of the year, a 29% year-on-year increase.

May's rise in revenue coincided with a growth in the number of visitors from mainland China, including a surge during the five-day holiday period at the beginning of the month.

Visitation during Golden Week increased by 40% from April, while the highest single-day tally since January 2020 was recorded on 1 May 2021; with 45,000 visitors arriving in the 24-hour period.

Macau's GGR has now increased sequentially over the last three months,

having dropped slightly in February.

Last month, several groups announced their commitment to increase vaccination rates among staff, in a bid to support the Macau SAR Government's call for more residents to get vaccinated. Melco Resorts & Entertainment, MGM China and Galaxy Entertainment Group have all announced initiatives aiming to improve the situation in Macau.

Sands China and SJM Holdings both joined the list of groups to launch such vaccination programs earlier this week.

GI Verdict: Macau's slow but steady growth in GGR will be of both joy and relief for the DICJ and indeed the operators in the region, who have had to wait a long time to see such promising results. With more and more companies joining the drive to vaccinate staff as soon as possible, there is every belief the positive GGR figures can continue to grow in the months to come.

As discussed in last week's *GI Friday*, however, too much cannot be read into the huge growth figures to come, given last year's desperately low totals.



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REVENUE AND HANDLE: RHODE ISLAND, VIRGINIA AND WASHINGTON DC

Fantini Research provides the latest US data as part of its partnership with *Gambling Insider*. In Rhode Island, sports betting revenue was up on 2019 only thanks to online betting, with retail revenue down 25%.

Washington DC, meanwhile, saw sports betting revenue increase month-on-month, despite handle falling.

WASHINGTON DC: SPORTS BETTING - APRIL

	APRIL REVENUE (M) VS MARCH REVENUE (% CHANGE)		APRIL HANDLE (M) VS MARCH HANDLE (% CHANGE)	
William Hill (CZR) percent	\$1.551	+ 34.70	\$8.005	- 29.97
Gambet (Intralot)	\$0.536	- 25.09	\$2.742	- 28.68
Total	\$2.087	+ 11.79	\$10.747	+ 29.64

RHODE ISLAND: SPORTS BETTING REVENUE - MAY

SPORTS BETTING	MAY 2021 (M) VS. 2019 (% CHANGE)		OPERATORS
Tiverton	\$0.522	+ 30.82	WMH
Twin River	\$0.954	- 39.28	WMH
Online	\$1.692	N/A	IGT/WMH
Total Revenue	\$3.169	+ 60.83	N/A
Excluding Online	\$1.476	- 25.08	N/A

RHODE ISLAND HANDLE

HANDLE	MAY 2021 (M) VS. 2019 (% CHANGE)		OPERATORS
Tiverton	\$4.118	+ 28.84	WMH
Twin River	\$8.822	- 35.44	WMH
Online	\$16.102	N/A	IGT/WMH
Total Handle	\$29.041	+ 72.25	N/A
Excluding Online	\$12.939	- 23.25	N/A

WINNERS ANNOUNCED 28TH JUNE, 3PM BST



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GUEST COLUMNIST



SHAWN HARRIS,
*DIRECTOR OF CASINO
SOLUTIONS, OMNICO
GROUP*

After a difficult 18 months, the imminent lifting of lockdowns can offer casinos an opportunity to make up for lost time and revenue.

For some, the recovery is already beginning: casinos in Nevada surpassed \$1bn in takings this March for the first time since February 2020.

That said, casinos can't just go back to pre-Covid tactics; enticing guests back will require pulling out all the stops to enhance guest experience: Atlantic City's Hard Rock Casino, for instance, is investing \$20m in renovations to its gaming floors and restaurants. But reopening in style and unlocking recovery doesn't necessarily have to be so costly and labour-intensive. A great way for casinos to take customer service to the next level this year is upgrading their POS systems, simplifying how guests pay for tickets, refreshments, store items, fuel and more.

POS technology pervades the entire venue, and modernising it can bring efficiency to what would otherwise be a complex, disjointed guest experience. Casinos can improve this by harnessing existing touch points and data to re-engage guests and boost earnings, rather than investing in expensive promotions that add little value. Implementing innovative POS systems can help ensure casinos have a successful year – and now is the time to act.

THREE WAYS CASINOS CAN HARNESS THE POWER OF POS

Exciting evolutions in recent years have propelled payment systems well into the future. Trailblazers in the retail space, like Amazon Go, have gone as far as allowing customers to skip checkouts entirely and pay for items via their online accounts, making shopping smoother by eliminating barriers to sale.

This wave of innovation can also unlock advantages for other sectors, and the gaming industry is no exception. With that in mind, casinos that continue to use legacy POS systems need to rethink their approach – or they'll get left behind.

1. Simplifying orders and payments. The latest POS systems feature order-ahead, contactless and multi-pay options for guests as standard. These are designed to make transactions fast and frictionless, giving guests more time to do what they love – whether it's playing slots, shopping, or watching live entertainment – and pay contactless for maximum convenience. And it's not just guests that benefit from this: order-ahead is proven to increase average transaction value for casinos by up to 3.5%.

2. Maximising customer data. With new-generation POS systems, casinos can make better use of customer data and create seamless and relevant experiences. Some POS solutions have the ability to gather data at every customer interaction – from conventional cash registers to mobile apps or kiosks – and collate it into guest profiles.

Based on the information in these profiles, businesses can offer tailored engagements and personalised experiences that visitors are sure to enjoy. Not only this – when all POS systems are integrated with one another, rewards can then be collected and redeemed at any touchpoint across the casino, maximising value for visitors and encouraging more visits and purchases.

By giving visitors exactly what they want, when they want it, through modern POS technology, casinos can delight them and keep them coming back for more.

3. Ticketing and capacity management. After a long break, visitors are excited to return to their favorite activities. By connecting ticketing systems with their POS, casinos can make it far easier for customers to enjoy the venue and everything it has to offer. With smart POS systems, guests can sign up for live entertainment events right from their mobile devices, and gain access with a simple swipe. Having a clear view of ticketing and occupancy can then empower operators to manage capacity, minimising lines and offering timely upgrades. If a ticketing system is supported by state-of-the-art POS technology, casinos can also give guests the ability to select and pay for additional services on-site and enjoy them without having to wait. The result? A stress-free casino experience.

A SAFE BET FOR RECOVERY

Consumers expect more than ever before from casinos. Turning to modern POS systems is a clever and cost-effective way to enhance the guest experience and increase revenue. It's a safe bet for businesses on the road to recovery this year.

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The background is a dark teal space filled with glowing digital elements. A large, stylized 'V' shape is formed by bright blue and white light trails. Inside the 'V', there are four glowing white circles arranged vertically. Above the circles, there are vertical columns of binary code (0s and 1s) and other digital symbols. The overall aesthetic is futuristic and high-tech.

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