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# WEEK 29

## FRIDAY 23 JUL 2021

**EXCLUSIVE: JUST 16% OF  
UK GAMBLERS READY TO  
RETURN TO PHYSICAL  
VENUES; 37% IN US**





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## THIS WEEK

- M&A double: Elys and Raketechn make acquisitions
- The weight of the Crown
- New statistics released by Gambling Commission
- BGC on Snapchat opt out

### GUEST PANEL:

- Tal Ron All Stars panel, AffiliateCon Virtually Live

# WEEK 29

FRIDAY 23 JUL 2021

**EXCLUSIVE: JUST 16% OF UK GAMBLERS READY TO RETURN TO PHYSICAL VENUES, COMPARED TO 37% IN US ▼**



See Also Page 3  
American sportsbooks continue to impress ▼

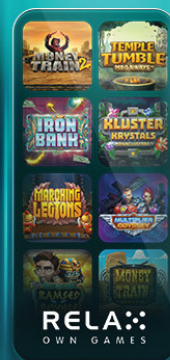
## DRIVING DIFFERENTIATION

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Harris Interactive has produced an in-depth report on gambling attitudes across the UK and US, the key findings of which *Gambling Insider* can exclusively reveal below

▶ In its 'State of the Gambling Market 2021: UK & US' report, Harris Interactive has outlined current gambling interests and attitudes amid unprecedented times for the gambling industry in both regions.

Using Toluna Start, Harris Interactive conducted 4,248 interviews (2,129 in the UK, 2,119 in the US) between 30th April and 7th May 2021. Data was weighted by age, gender and region to be census representative in all markets.

The study aims to provide a better understanding of interests and attitudes within gambling amid the impact of the Covid-19 pandemic, the UK Government review of the Gambling Act 2005, and the launch of sports betting services across recently legalised US states.

In terms of gambling interests, the study found that sports betting is most popular in the UK, with casino games leading the way in the US. Interest in sports betting is, however, growing rapidly in the States since legalisation began. Perhaps unsurprisingly, popularity follows national sporting interests in each country, with UK bettors favouring football and horseracing, and US bettors favouring basketball and American football. Boxing, meanwhile, has a strong future in both markets, according to the study.

And when it comes to casino game players, slots games continue to grow in popularity, while there is also interest in blackjack, roulette and poker.

US gambling spend is higher than UK gambling spend, but both have increased during the pandemic; 39% have increased spend in the former, with 21% in the latter.

Views were also expressed on the reopening of physical venues in both countries, with more caution in the UK than in the US. A total of 16% of UK gamblers feel comfortable about returning to such venues, compared to 37% in the US. However, reassurance of sanitisation and safety measures in physical venues will encourage players to return, though this must be "prominent and consistent to ensure confidence."

The study also focused on attitudes towards responsible gambling, as well as regulations, two prominent issues that have garnered much attention in recent months in both the UK and the US.

A total of 81% of US respondents believe that a responsible gambling environment is important when choosing a provider, compared to 68% in the UK, with the majority of the UK and US public aware of the measures available to help promote responsible gambling. Furthermore, both nations "recognise the need for further measures to protect the vulnerable from gambling harm." One in 10 UK gamblers are concerned that they gamble

too much, with that figure rising to a quarter of US gamblers.

On regulation, the study reported that there is "awareness and support for regulations that have been implemented and potential changes considered in the review of the UK Gambling Act," adding that "attitudes are mixed and generally favour a duty of care approach for others, rather than restrictions for personal concern."

Two thirds of the UK and US public believe gambling advertising encourages people to gamble excessively, with 72% of UK and 67% of US respondents saying children should not be exposed to such advertising. The majority of those surveyed believe potential restrictions on gambling advertising would be effective in limiting gambling harm, particularly the banning of celebrity endorsements.

Opinions on the banning of bookmakers from sports sponsorship, meanwhile – a key issue within the impending UK Government review of the Gambling Act 2005 – were also analysed, with 21% of the UK and 15% of the US disagreeing that this would have an effective impact. However, the majority of respondents from both nations have no issues with current advertising, with almost half of the UK and over half of the US agreeing that no further restrictions are needed across different media channels.

***"A total of 16% of UK gamblers feel comfortable about returning to such venues, compared to 37% in the US"***

In payments, debit card usage and mobile contactless payments will continue to grow, with 28% of UK gamblers to use debit cards more often for gambling purposes, and 26% set to use contactless payments more often. The majority of the UK public agrees with the current ban on credit card payments to UK gambling operators which came into effect in 2020, with 26% disagreeing. Due to limited public familiarity, the use of cryptocurrencies in gambling has raised concerns over safeguarding and affordability controls, with only 12% saying cryptocurrencies should be allowed to be used freely within the industry.

And with regard to US legislation, just 51% of the public said they have a clear understanding of the legal status of gambling in the country, with 24% not sure and 25% not knowing enough about the issue. According to Harris Interactive, "awareness and understanding will increase and the US market presents a significant and fast growing opportunity for operators."

# THIS WEEK IN NUMBERS

## 100%

Year-on-year increase in Q2 revenue for Evolution, to €256.7m (\$301.8m)



## 20 million



Americans are expected to wager on the Tokyo Olympics

## 2

DraftKings has been named the official betting operator of two golf tournaments in the US



## 16-year-olds



The UK Government has once again agreed to allow 16-year-olds to sell lottery tickets

## 20%

Year-on-year rise in visitors to Macau for H1 2021, to 3.9 million



## AMERICAN SPORTSBOOKS CONTINUE TO IMPRESS

Despite a slight drop-off in June, sportsbooks in New Jersey, Pennsylvania and Michigan still managed to report impressive figures.

Even when the US market is seen as slowing down, the numbers reported are not bleak by any means.

New Jersey was the state that reported the highest revenue since sportsbooks posted a record \$82.6m in January; the main source of revenue came from parlay betting which made \$164.4m.

The state's online and retail sportsbooks faced a decline in betting volume for June, but still managed to yield \$71.3m in gross gaming revenue.

Online and retail sportsbooks took in \$766.9m in bets during June, a 5.8% decrease from May's \$814.3m. June's betting produced \$10.5m in state and local taxes.

However, June's total is still a year-on-year increase as bets amounted to \$117.8m in 2020, a month that was plagued by pandemic-related closures.

According to PlayNJ, New Jersey's advantage over other states is the popularity of the NBA in the Northeast.

During June, there was \$190.9m worth of basketball-related bets, the most of any sport during the month.

Across the first six months of 2021, basketball has created \$1.7bn in wagering, which is 34.5% of the \$4.8bn total handle.

Meanwhile, Michigan online and retail sportsbooks took in \$259.4m in bets, a 0.7% increase from May's total of \$257.7m.

Online sportsbooks accepted \$235.1m in wagers, down 1% from May. Meanwhile, retail sportsbooks accepted \$24.4m.

April, May and June are usually slower months for sports betting in America; however, data shows that no other state experienced a steeper decline than Michigan.

March was a month where record handles were being reported across the country; the state of Michigan's combined handle in June is 32.4% off

March's record of \$383.7m.

In comparison, Indiana experienced a decline of 22.2%, while Iowa saw a 31.1% drop off from March to June.

However, gross gaming revenue for online sportsbooks in Michigan had a monthly increase of 28.2% to \$24.9m in June.

The month's betting hold of 10.6% for operators was Michigan's best for any full month. The state produced \$16.8m in taxable revenue, an increase from May's \$9.9m. The total yielded \$1.4m in state and local taxes from online betting.

Lastly, after two years of online sports betting, Pennsylvania has now taken in \$8.1bn in online and retail wagering since its launch, only New Jersey and Nevada have taken in more during that time.

Online and retail sportsbooks in Pennsylvania accepted \$420.2m in June, down 6.1% from May's \$447.5m.

Sports betting revenue jumped up to \$42.5m, which was up 13.6% from the \$37.4m reported in May.

In June, 90.3%, or \$379.3m, of all sports bets were made online; the month saw an increase in the number of online wagers.

FanDuel dominated the period by producing \$162.5m in online wagering, up from May's \$160.9m.

By accepting 42.9% of all online wagers in June, FanDuel took in its largest market share since August.

Second on the list was DraftKings with \$86m bets, down from \$100m in May.

**GI Verdict:** It's clear that bringing sports betting into the US was the right move and as more states continue to legalise it, we can expect similar figures across the country. States like New Jersey, Michigan and Pennsylvania have been reporting consistently high numbers for several months, even though there's the occasional drop off.

Most importantly, even if handle is down, revenue is way up. Earlier in February, banking group JP Morgan estimated that the US sports betting market could be worth \$9.2bn within just four years.





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3



Las Vegas casinos have reintroduced mandatory mask wearing for their employees

## 19 July

Was 'Freedom Day' in England, which meant more relaxed Covid-19 social distancing rules for casinos and betting shops



## 4.3%

The percentage to which Kindred Group's harmful gaming revenue increased for Q2



### M&A ROUNDUP: ELYS AND RAKETECH MAKE ACQUISITIONS

Elys Game Technology and Raketechn have this week completed important company mergers and acquisitions. Elys closed the transaction to acquire 100% of USB interests USBookmaking / which is now a solely owned subsidiary of Elys.

The purchase price for the equity of USB stood at \$12m and was paid between a 50% cash split, with the latter half in 1,265,823 million shares on the company's common stock. The merger between the two companies aids in USB becoming a central part of Elys' US-facing brand.

This also provides Elys with operations in New Mexico, Michigan and North Dakota. Two additional regions, Washington D.C. and Iowa, are also in progress.

Vic Salerno, President of USBookmaking, said: "USB realised that to increase our client base we needed a sportsbook platform that was built for the United States market."

Alongside this, iGaming performance marketing partner, Raketechn, announced the acquisition of Spanish-based casino

affiliate marketing company, Infinileads SL.

The overall purchase price equated to €4.5m (\$5.3m) on a cash and debt free basis, which will be payable in two instalments: €2.5m by closing 31 January 2021 and €2m by closing 31 January 2022. Based on performance measures over a period of 24 months post closing, there is a possibility of additional earnout payments.

"With the acquisition of Infinileads, we significantly increase our geographical footprint, taking strong positions on the emerging Latin American market as well as Southern Europe," said Oskar Mühlbach, CEO of Raketechn.

**GI Verdict:** The acquisitions of these smaller companies come as no surprise in this dog-eat-dog (or big-fish-little-fish) industry. With evolution comes innovation and the purpose of a successful company comes with making decisions to grow and expand at all costs. Both company mergers will help inflate the overall client base of the parent companies, all the while enlarging the businesses' geographical footprint.

## THE WEEK IN QUOTES

*"The states and territories have all banned the use of credit cards from places like TABs, from poker machines, from casinos and RSLs et cetera. There's one place you can still use your credit card to gamble, and that's on the internet."*

**MP Andrew Wallace, who is working to ban credit cards from being used in any form of gambling in Australia**

*"If casinos want to truly harness the transformative power of cashless gaming, they must integrate digital payments and loyalty rewards into their casino management system. This partnership with Aristocrat will enable players across North America to seamlessly access cashless gaming on a scale that the industry has not seen before."*

**Andrew Crowe, SVP for Sightline Payments, on the company's new deal with Aristocrat**

## CROWN RESORTS: UNSUITABLE TO HOLD CASINO LICENCE

The counsel assisting Victoria's royal commission with its inquiry into Crown Resorts believes the operator is not suitable to hold a casino licence.

The conclusion comes after a variety of safety breaches and cases of mismanagement were uncovered during the hearings.

"After all the evidence presented in these hearings it remains clear Crown is not presently suitable to hold a casino licence," said Adrian Finanzio SC. "The evidence reveals serious misconduct, illegal conduct and highly inappropriate conduct, which has been encouraged or facilitated by a culture which has consistently put profit before all other considerations."

According to the lawyer, Crown focused on profits before accountability or other considerations. The Bergin report, investigating and detailing the failings of the company when it comes to money laundering prevention, saw Crown lose its licence to operate in New South Wales.

This launched the royal commission into Crown's eligibility in Victoria, with

Premier Daniel Andrews promising that he is prepared to take away the company's Melbourne casino licence should the commission recommend it. The commission found that Crown may owe the state nearly AU\$480m (US\$351.4m) in unpaid taxes; so far, the operator has only agreed to pay AU\$50m, according to ABC News.

Finanzio noted that Crown did not put anywhere near enough effort into stopping possible money laundering; nor did it manage its accounts properly, while the gaming floor wasn't equipped to sufficiently handle the risk of illegal activity. The lawyer noted that Commissioner Ray Finkelstein QC is within his rights to allow Crown to keep its licence, but it would be difficult to justify.

**GI Verdict:** It's no secret that Crown has continuously disregarded what is considered responsible, safe or fair in terms of gambling regulations. So, the question on the tip of everyone's tongues is: If Crown lost its licence, would Victoria soon enough find itself a sans casino city?



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*"Becoming Parimatch Tech is a natural step for us as a company, and formalises and reflects our technological transformation. It is a sign of the maturity of our company internally, and we are pleased to share this news with both the public and our partners."*

**Maksym Liashko, co-CEO of Parimatch, on the operator's rebrand to Parimatch Tech**

*"The BHA and other leaders from the British racing industry, including the independently chaired Horse Welfare Board, will be meeting to consider further the issues raised by this programme. We will also be in contact with our counterparts in Ireland."*

**The British Horseracing Authority reacts after a BBC documentary brings into question the treatment and euthanasia of some race horses**

## GAMBLING COMMISSION REPORTS DECLINE IN ACTIVE ACCOUNTS AND GGY

Active accounts and gross gambling yield (GGY) in the UK have decreased from March 2020 to May 2021, according to the latest data from the Gambling Commission.

The former decreased 14%, with the latter decreasing 5%. Total bets, meanwhile, remained at a similar level.

Slots GGY increased to £211m (\$287.8m) from April to May, with the number of spins increasing 2% and active players decreasing 5%.

The number of online slots sessions lasting longer than one hour decreased by 1%, with the average session length increasing to 20.7 minutes. Almost 9% of all sessions lasted over one hour.

The data aims to show how the evolving Covid-19 lockdown measures have impacted online gambling behaviour in Great Britain.

The Commission did, however, note that it is "not advisable to make year-on-year comparisons between months in 2020 and months in 2021, due to differing operating circumstances of

2020 and 2021."

The body also urged operators to increase vigilance going forward, saying: "We recognise that the country is now entering a different phase as we continue to ease out of lockdown. We continue to expect extra vigilance from operators as consumers are impacted in different ways by the circumstances. Many people will still feel vulnerable as a result of the length of the pandemic period and further uncertainty about their personal or financial circumstances."

"It is likely many have picked up new gambling routines and habits during lockdown that may be hard to change as things return to normal, even as normal spending on other things resumes."

**GI Verdict:** Last year when the pandemic was at its peak, online gambling soared as active gamblers were forced inside their homes.

However, with restrictions lifting it seems some gamblers are favouring land-based gaming – or perhaps other forms of entertainment altogether.



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## TAKING STOCK

SHARE PRICES COVER WEDNESDAY  
14 JULY TO WEDNESDAY 21 JULY  
(09:45AM GMT)

**Elys Game Technology** ↑ 13%  
4.11 USD

**Raketeck** ↔ 0%  
20.55 SEK

**Evolution** ↑ 1%  
1,419 SEK

**DraftKings** ↑ 2%  
45.82 USD

**PointsBet** ↓ 3%  
12.15 AUD

## BGC WELCOMES SNAPCHAT'S SOCIALLY RESPONSIBLE ADVERTISING

The Betting and Gaming Council (BGC) has praised Snapchat for instigating the 'opt out' option for gambling advertisements in the UK.

After a year, Snapchat and the BGC have been working closely to initiate this move, in hopes that customers have more free reign to control the advertisements they are subjected to while using the app.

Snap UK General Manager, Ed Couchman, spoke on the decision: "It has always been important to us that our community is able to influence the types of adverts they see on Snapchat. It's fantastic to roll this change out and we're grateful to have partners in the BGC who are doing vital work to ensure this industry continues to grow and evolve with consumers at the heart."

Last year, Snapchat successfully met all requirements under the updated Industry Code for Socially Responsible Advertising. The BGC has since agreed to ensure all ads on social media are targeted to consumers 25 years or

older, with the exception of websites particularly stating an audience for over-18s.

"This is yet more evidence of our commitment to raising standards in the regulated industry," said BGC chief executive Michael Dugher.

"This is yet more evidence of our commitment to raising standards in the regulated industry," said BGC chief executive Michael Dugher.

"I welcome this move by Snapchat and I would urge all social media and search platforms to provide the ability for users to opt out of viewing betting adverts.

**GI Verdict:** Gambling advertisements and their potential harm have seen a debate arise around what organisations can do to reduce exposure to gambling-related adverts.

Many feel adverts can lead to more problem gambling and have a negative influence on children; however, there is little tangible evidence to support a direct link between adverts and problem gambling rates.

# 13<sup>th</sup> ANNUAL TRIBAL CASINO & HOTEL DEVELOPMENT CONFERENCE WE-KO-PA CASINO RESORT FORT MCDOWELL, AZ

SEPT  
13-14  
2021

"Very worthwhile with relevant speakers and topics. There was a well-balanced agenda, leaving enough time to network."

— Ron Patel, CEO, Black Oak Casino Resort

"People are there because they have an interest in expanding. There's not a bad booth in the room, and it's the perfect size to get time with people."

— Tim Hnedak, Executive Vice President of Marketing & Business Development, Dream Catcher Hotels



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## JUNE REVENUE REPORT: MASSACHUSETTS

Massachusetts gaming revenue rose 67.21% to \$84.084m compared to the same month in 2019.

However, revenue fell 5.89% to \$31.525m factoring out Wynn's Encore Boston Harbor, which opened on 23 June 2019.

Average daily revenue at Encore in June fell 16.52% to \$1.752m compared to the casino's first eight days of operating.

There is no 2020 comparison due to Covid-19 closures.

ALL-SOURCES REVENUE	REVENUE (M)	% CHANGE VS. 2019
Encore Boston Harbor (WYNN)	\$52.559	+213.04
MGM Springfield (MGM)	\$20.207	+1.26
Plainridge Park (PENN)	\$11.318	-16.43
<b>Total</b>	<b>\$84.084</b>	<b>+67.21</b>
<b>Same Store*</b>	<b>\$31.525</b>	<b>-5.89</b>

SLOTS	REVENUE (M)	% CHANGE VS. 2019
Encore Boston Harbor (WYNN)	\$29.355	+221.94
MGM Springfield (MGM)	\$16.534	+12.51
Plainridge Park (PENN)	\$11.318	-16.43
<b>Total Slots</b>	<b>\$57.207</b>	<b>+53.14</b>
<b>Same Store*</b>	<b>\$27.852</b>	<b>-1.37</b>

TABLE GAMES	REVENUE (M)	% CHANGE VS. 2019
Encore Boston Harbor (WYNN)	\$23.204	+202.47
MGM Springfield (MGM)	\$3.672	-30.17
<b>Total Table Games</b>	<b>\$26.877</b>	<b>+107.85</b>
<b>Same Store</b>	<b>\$3.672</b>	<b>-30.17</b>

\*Same store excludes Wynn Resorts' Encore Boston Harbor.

## GUEST PANEL



**MODERATOR:**  
**TAL ITZHAK RON,**  
*CHAIRMAN AND CEO,  
TAL RON, DRIHEM & CO.,  
LAW FIRM*

*Speakers: Viktorija Nemniasevaitė,  
CX Officer, ConnectPay;*

*Emily Helmer, Head of Compliance and  
eMerchant Services, Tal Ron, Drihem & Co.,*

*Law Firm; Jeffrey Romano, CMO, FinXP; Gonzalo Jusid, Co-Founder,  
Mobile Brain; Dmitrii Guniashov, Managing Director, Cryptopay;*

Top gaming attorney Tal Itzhak Ron takes the chair again, hosting AffiliateCon for the third time since May 2018. Each year the gaming lawyer hosts the exclusive Tal Ron All Stars panel, divulging topics around gaming law, financial operations, affiliates and digital marketing.

**TR:** I have memories from the first AffiliateCon, the guys from *Gambling Insider* told me they have a new project for affiliates and in 2018 invited me to run the first Tal Ron Panel in Sofia. If these cool guys, Julian and Gary, call Tal, then Tal comes. They gave me the opportunity to choose experts I recommend and vouch for, whether it be business partners, friends, clients or suppliers of our firm. I'm really proud and really happy to be able to do this.

So, I want to ask each member of this panel, how do you and the business give extra value to your partners and suppliers or clients that differ from the competition?

**DG:** We've been in business for eight years, serving our clients; and we think the biggest and the most important thing is trust and putting our clients first, ensuring we are going the extra mile to deliver. Customer support is very important. Making sure day to day and longer term demands with our clients are solved is paramount.

**VN:** We still consider ourselves a boutique institution; we are very close to our clients and discuss every new product.

We organise workshops for them, take the feedback and react swiftly. We are like a family. The clients are a part of our family just as our employees. They set priorities for us and dictate which improvements should go first. What they need and what they are missing. This whole co-creation makes it a very exciting place. Now the compliance department is the biggest department in our team. We make impossible things possible.

**JR:** One of our strengths is certainly our ability to develop our products, listen to our clients and see what the market needs. It's an entrepreneurial culture and experience. Our executive team are all entrepreneurs, and have had their own successful businesses in the past.

To have a strong team with such an entrepreneurial past naturally aids in a strong team – with the same mindset. We are always trying to see how to further innovation. Not just for ourselves but for our clients.

**GJ:** The main points are that we specialise in mobile apps. We are one of the first or the first in the industry. Even though we are a large affiliate company, we still carry on the ethos that we are a small and articulate partnership, tailoring specially to every partner.

Also, all of our partners used to work on the other side of the industry, so we do really understand our clients. And this helps in relating with them personally and gives an extra nudge on our service, all down to our likeminded knowledge.

**EH:** The firm was established in 2003 and we still have clients that have stayed with us since the outset. The real reason we differentiate from other firms is that the only way we do business is an all-inclusive, full package for our clients. Meaning; we help with any legal services or ongoing advice they need, banking solutions and compliance services.

We also involve our clients with the essence of the business so we offer business partners and clients to sit on panels or attend lunch or dinner events. We are very involved with our clients. It's not a business; it's more of a family. We find it very important to include our clients in many personal activities. In doing so we all obtain a close relationship and a partnership.

*Watch the engaging full panel on the AffiliateCon website*

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