



WEEK 11

FRIDAY 18 MAR 2022

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THERE CAN BE ONLY ONE: ALLWYN LANDS NATIONAL LOTTERY LICENCE



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THIS WEEK

- New York sees \$1.5bn handle for February
- PlayUSA and AGA bet big on March Madness
- LeoVegas and Play'n Go land Ontario licences
- IGT offers iGaming content to West Virginia operators
- Macau travel ban causes shares to tumble
- Tyson Fury's father named Freebets ambassador

GUEST COLUMNIST:

- Adam Wilson, Founder and CEO, Splash Tech

See also page 3

Sports betting round-up:
Cheltenham and March Madness



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Allwyn Entertainment is set to take over The National Lottery after being named the Gambling Commission's "preferred applicant"

▶ Four operators enter: one operator leaves. Following a heated contest, European lottery giant Allwyn Entertainment toppled the incumbent Camelot to emerge victorious, securing the right to run the UK's National Lottery.

On Tuesday 15 March 2022, the Gambling Commission declared Allwyn its "Preferred Applicant" for the Fourth National Lottery licence which means, after three decades, Camelot's reign will come to an end.

Despite seeing the highest number of applications since the first National Lottery licence was awarded in 1994, the contest ultimately came down to four operators: Camelot, Allwyn, Sisal SPA and The New Lottery Company Ltd.

This quartet of aspiring licensees hail from various countries, with Camelot headquartered in England, though its parent company, the Ontario Teachers' Pension Plan, is Canadian.

Likewise, Allwyn's UK arm will oversee The National Lottery, but the group is based in the Czech Republic. Sisal, meanwhile, though recently acquired by Ireland's Flutter Entertainment, is Italian, and The New Lottery Company is a vehicle for former adult magazine tycoon Richard Desmond.

But Allwyn's proposal, led by Bid Chair Sir Keith Mills, was deemed the best way of growing returns to good causes and revitalising The National Lottery in a sustainable way. Mills previously led London's successful bid for the 2012 Summer Olympic Games.

To date, National Lottery players have collectively raised more than £45bn (\$59bn) for 660,000 good causes across the UK covering areas such as the arts, sport, heritage and communities.

A transition plan will now be completed, led by Allwyn Chair and ex-Sainsbury's boss Justin King, with Allwyn taking over responsibility for day-to-day operations from 1 February 2024, when Camelot's current contract expires.

Sir Keith Mills commented on the announcement, saying: "The National Lottery is a national treasure, and we are honoured to have been chosen as its future custodian.

"With the Gambling Commission having put its trust in us, we can immediately start to enact our exciting plans to deliver The National Lottery back to the heart of our country.

"We will do this by rekindling the meaning The National Lottery has for each of us, whether as individuals or as part of the communities we live in; whether we play The National Lottery or not."

King expressed a similar sentiment, remarking: "I'm delighted that Allwyn's proposal has been deemed the strongest to grow good causes in the safest and most sustainable way possible.

"The Gambling Commission has run a lengthy and detailed process, and I've been extremely impressed by the attention they have paid to the challenges facing The National Lottery over the coming decades.

"The National Lottery is a vital British institution and we're focused on ensuring it plays an even bigger part in society by increasing participation, improving safeguards and giving back more to good causes."

Camelot was justifiably upset about the contest's conclusion, but accepted defeat with dignity, thanking its employees and reflecting on its stewardship of The National Lottery.

However, CEO Nigel Railton did say that Camelot was currently reviewing the Gambling Commission's evaluation "carefully" before "deciding on its next steps" — perhaps hinting at an appeal.

"I'm incredibly disappointed by today's announcement, but we still have a critical job to do — as our current licence runs until February 2024," commented Railton.

"We're now carefully reviewing the Gambling Commission's evaluation before deciding on our next steps.

"I'm enormously grateful to our 1,000-plus employees who have been unwavering in delivering record-breaking results during the current licence."

Camelot was named "Reserve Applicant" by the Gambling Commission, which also said it was satisfied that no application was impacted by sanctions related to the conflict in Ukraine.

"Our priority was to run a competition that would attract a strong field of candidates. Having received the most applications since 1994, it is clear that we've achieved just that," said Gambling Commission CEO Andrew Rhodes.

"I am confident that the success of the competition will lead to a highly successful fourth licence — one that maximises returns to good causes, promotes innovation, delivers against our statutory duties and which ultimately protects the unique status of the National Lottery.

"We look forward to working with all parties to ensure a smooth handover."

GI Verdict: A new operator marks a new era for The National Lottery, and whether Camelot's custodianship will be positively judged or not, will ultimately come from comparison to Allwyn's forthcoming tenure. While the Czech-based business has overseen major lotteries elsewhere, its UK market experience cannot stand up to Camelot's. However, the operator has stacked its team with veterans from Britain's retail sector. While there may be a bumpy patch ahead, The National Lottery is likely in safe hands, but regardless, we'll be keeping a weather eye on what both companies do next.

THIS WEEK IN NUMBERS

\$313m

In February wagers for Tennessee's sportsbooks, down 19% from January



79%

Revenue increase for Genius Sports for Q4 2021



\$5m

Jackpot in new Bracket Challenge predictor game from bet365



\$750m

Durango Casino & Resort project by Station Casinos, set to launch in Las Vegas in 2023



\$215.9m

February handle for Iowa sportsbooks



SPORTS BETTING ROUND-UP: CHELTENHAM AND MARCH MADNESS

Cheltenham Festival

Paddy Power unveiled a supersized retirement card commemorating Tiger Roll whose career came to an end during this year's Cheltenham Festival. The thoroughbred, who is estimated to have earned bettors approximately £500m (\$652m) over his career, ran his final race on 16 March in the Glenfarclas Cross Country Chase. Paddy Power sent a giant card to Cheltenham Racecourse via special delivery for people to sign, allowing punters to express their well wishes for his retirement. The card measured 10ft in height and 14ft in width.

In other **Paddy Power** news, Peter Crouch featured in an ad for the bookmaker, going on a rampage after receiving a suspect betting tip on the Cheltenham Festival. Paddy Power's latest spoof-style advert features the former England football player hunting down so-called horseracing expert Mark Chapman, who gave him a bad tip on the 'nap of the day'. In the advert, Crouch decides to make his wife, Abbey, do the washing up if the bet comes good, otherwise he'll have to do it himself. When the horse finishes in second, Crouch decides to stalk Chapman throughout the day... in his washing-up gloves.

Betting brand **Coral** debuted a 3D horseracing display in London's Piccadilly Circus ahead of this year's Cheltenham Festival, becoming Britain's first bookmaker to use such technology. Devised by Coral's lead creative agency, Bartle Bogle Hegarty, the "DeepScreen activation" at Ocean Outdoor's Piccadilly Lights featured four horses and their jockeys jostling for first place. The riders and their mounts eventually faded away, leaving one horse which then leapt out of the screen in slow motion.

Topping off our Cheltenham coverage, Will Armitage, Co-Founder of affiliate **BestOdds.com**, and Jack Mansell, Director of **Press Box PR**, gave Gambling Insider their takes on this year's Festival. Mansell was happy to see the Festival back as the flagbearer for British and

Irish jump racing. Armitage, meanwhile, jokingly opined: "My banker of the week is Vauban in the first race on Friday, 275,000 pints of Guinness will be drunk over the week and non-Irish trained horses will only win seven races of the 28 over the week."

March Madness

PointsBet debuted three new betting products for college basketball, as part of its OddsFactory proprietary technology integration. These new capabilities aim to provide customers with a wider variety of options for in-game betting as the season leads into the NCAA tournament, aka March Madness. With this new technology, the live betting sportsbook will expand its offerings for both pre-game, same-game parlay and in-play markets.

DraftKings will broadcast an extensive schedule of sports betting programming throughout the upcoming bracket reveal for the Men's College Basketball Tournament. In response to the growth of the event, which comprises 68 college teams competing in a knockout tournament, DraftKings will host a comprehensive analysis of the opening betting lines, in addition to breaking news and coverage from industry experts and sports personalities.

According to **The Casino Association of New Jersey** (CANJ), Atlantic City's casinos are prepared for the thrill of the NCAA matches that lie ahead during March Madness. Throughout March, Atlantic City casinos will host offers and special events aimed at enhancing visiting basketball fans' viewing experience. "Atlantic City casinos are ready to welcome college basketball fans to enjoy one of the biggest sporting events of the year," said Joe Lupo, CANJ President.

Finally, this year's March Madness could attract around \$3bn in legal wagering, according to **PlayUSA** and the **American Gaming Association** (AGA). For full details, see story four.

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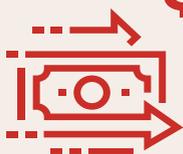
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\$409m



February
handle for
Indiana
sportsbooks

NEW YORK SPORTSBOOKS REPORT \$1.5BN IN WAGERS FOR FEBRUARY 2022

Wagering at New York's sportsbooks declined slightly in February 2022, but the state still posted the second-highest monthly total in US history.

Online sportsbooks averaged \$54.6m in bets per day over the month's 28 days, down from \$69.6m per day over the 24 days of betting in January. Such sportsbooks won \$82.4m in gross revenue from February's bets, down from \$124.1m in January.

"As big as the Super Bowl is, it is still just one game," said Mike Mazzeo, Lead Analyst for PlayNY.com. "And a slowdown in the immediate aftermath of the game is to be expected everywhere. The mild pullback won't last long, though. The NCAA Tournament is the nation's largest sports betting holiday, and that presents a huge customer acquisition opportunity for sportsbooks."

FanDuel led the online market in February with \$568.1m in bets, generating \$23.2m in gross revenue. This was followed by DraftKings with \$387.6m

in wagers and \$30m in gross revenue. Caesars meanwhile reported \$323.4m in wagers, and \$19.8m in gross revenue.

"A modest pullback was expected in February, and it shouldn't diminish what we have seen so far in New York," said Eric Ramsey, an Analyst for the PlayUSA.com Network, which includes PlayNY.com. "In less than two months, New York sportsbooks have generated more than \$3bn in wagers. That is a result that would have been difficult to fathom before January."

GI Verdict: The highly anticipated launch was always going to be huge, so the drop in figures for February was perhaps expected. But sportsbooks won't ponder on the decline for too long due to March Madness. FanDuel and DraftKings may be sitting in first and second place respectively in the market leaderboard for wagers and revenue, but much of the attention remains on Caesars. The company topped online operators in January, but has since slipped to third.

THE WEEK IN QUOTES

“DraftKings is already deeply embedded within the biggest moments in sports, and the new Primetime NFT Series will further drive engagement while also providing rewards that bridge to our gaming offerings for the first time. Few moments on the sports calendar can match the drama and spectacle of March’s college basketball tournament.”

Matt Kalish, Co-Founder and President, DraftKings North America, after the operator launched its Primetime NFT Series

“RAW is exactly the type of partner we are excited about. We will provide them with an unprecedented view into how players use and play their new innovative games through Anthem Amplifier. It will be an indispensable tool for RAW and help ensure even more exciting games will come out of this new and disruptive studio.”

Future Anthem CEO Leigh Nissim on the group’s new partnership with RAW iGaming

PLAYUSA & AGA: MARCH MADNESS TO ATTRACT \$3BN HANDLE

According to both PlayUSA and the American Gaming Association (AGA), the upcoming March Madness basketball tournament could attract around \$3bn in legal wagering.

PlayUSA reports that wagering could triple the nearly \$1bn in wagers taken in on February’s Super Bowl LVI. It could also top the 2021 NCAA Tournament as the most bet-on sporting event in US history.

It is expected that between \$2.5bn and \$3bn could be wagered across the country, a significant increase from the estimated \$1.4bn placed on last year’s NCAA Tournament. Such growth, according to PlayUSA.com, is a direct reflection of the growth in the US market, which has doubled in size over the last year.

The 2020 tournament was cancelled, but the 2019 edition reported an estimated \$440m in bets, despite just seven states having legal sports betting.

And according to the AGA, wagering on this year’s tournament will reach \$3.1bn.

Since last year’s tournament, 29 million more American adults can legally wager in their home state compared to March

Madness 2021.

“Americans continue to make it clear: they want to wager with the protections of the legal, regulated market,” AGA President and CEO Bill Miller said in a statement. “There’s no doubt this year will generate the highest legal handle in March Madness history.”

Miller added: “There is nothing more thrilling in sports than the magic of March Madness. If you are getting in on the action, have your game plan to bet responsibly. That means setting a budget, keeping it fun, learning the odds and playing legally.”

GI Verdict: Sports bettors outside of the US will perhaps fail to comprehend just why college basketball games are so popular, but the fact remains that March Madness is a hugely significant period for bookmakers.

One stat that does, however, put the tournament into perspective is the fact that March Madness wagering could triple the almost \$1bn figure record from the recent Super Bowl, a major sporting event with a global following.

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“Responsibility is not only core to Delaware North’s commitment to our customers, but essential to the sustainable growth of legal sports betting. We’re proud to work with the AGA on this important initiative to educate fans on responsible gaming.”

Jack McNeill, Chief Corporate Affairs Officer, Delaware North, after the organisation partnered with the American Gaming Association’s ‘Have a Game Plan. Bet Responsibly’ campaign

“In a world where telecommunications technology and entertainment are merging and morphing into one experience, we see WinTrillions as the ideal platform to offer our users a complete gaming experience that is safe, fair, affordable and fun. Our user bases are very complementary, and we see significant potential to expand this even further.”

Balesia CEO George Alvarez on the group’s marketing partnership with Kings Entertainment Group

LEOVEGAS GROUP, PLAY’N GO AWARDED LICENCE IN ONTARIO

April 4 marks the date when iGaming operators and suppliers can go live with their businesses in Ontario.

LeoVegas Group is the latest in a string of operators to register in Ontario, joining the likes of 888, PointsBet Canada, Real Luck Group and theScore.

The group was notified of the registration by the Alcohol and Gaming Commission of Ontario, describing the move as an “important step in the province’s licensing process.”

The next and final step involves entering into an operating agreement with iGaming Ontario, which is possible once the group has completed the necessary onboarding steps.

The company aims to offer casino, live casino and betting in the province under the brands LeoVegas and Royal Panda.

Similarly, Play’n Go has also been successful in its application for an iGaming licence in Ontario. The

supplier joins other B2B companies with supplier licences, including Bragg Gaming Group, Gaming Realms and High Five Games.

By receiving a supplier licence, Play’n Go can now make its portfolio of games available to B2C operators in Ontario. Such titles include Rise of Olympus, Book of Dead, Reactoonz and Tome of Madness.

GI Verdict: The additions of LeoVegas and Play’n Go to the ever-growing plethora of iGaming suppliers & operators primed to launch in Ontario points to the likely growth that lies ahead.

And, if you take heed of operator representatives such as LeoVegas and theScore, it’s hard to ignore that the size of Ontario – equivalent to the US’ fifth largest state – has a sweeping scope for opportunity.

However, we’ll have to wait until 4 April to see the real impact of iGaming in Ontario. We’re waiting keenly.



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PointsBet
3.85 AUD  3%

IGT PLAYDIGITAL TO EXPAND IGAMING CONTENT TO WEST VIRGINIA

International Game Technology (IGT) is set to expand its customer reach by offering content to online gaming operators across West Virginia. This move means IGT will now be available within five US states.

Players will be able to access the supplier's range of PlayCasino games. This includes titles such as Fortune Coin, Siberian Storm, Cleopatra and Ultimate X Poker, all of which were recently made available for mobile and online play via online casino operators.

Gil Rotem, IGT President of iGaming, commented: "Expanding IGT's PlayCasino footprint into West Virginia presents an incredible opportunity to further our leadership in a high-growth segment of our business. IGT has vast experience supplying compelling iGaming content and platform technologies to operators worldwide.

"IGT PlayDigital is the top provider of iGaming content in the US and we look forward to helping our customers in West Virginia maximise

player engagement as the demand for digital gaming continues to grow."

This expansion follows news of a strong year for IGT, which includes record income of \$902m and a reduction of net debt by \$1.4bn.

GI Verdict: IGT's expansion into West Virginia follows a string of similar moves into a range of international markets. This includes launches in Spain's Amusement Prize 'Salones' sector, and an extended agreement to fortify its role within the Mexican lottery industry.

This also comes alongside IGT's commitment to promote positive play during Problem Gambling Awareness Month.

The supplier is the latest to seep into the newly regulated West Virginia market, following the likes of Wizard Games. IGT will no doubt look to capitalise on the continued migration of operators to the Mountain State, too, with PointsBet among the most recent additions to this newly regulated market.

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MACAU TRAVEL BAN FUELS SHARE PRICE TUMBLE FOR OPERATORS

Following news of shares dropping 10% on average in Macau, which details HK\$35bn (\$4.4bn) lost in terms of market capitalisation across the six Macau casino concessionaires between Friday and Monday, stocks further tumbled.

HXEX figures detail specific market cap losses for each of Macau's six concessionaires, with SJM Holdings down some 19% on Monday's figures, slumping to a close of HK\$2.90, down from HK\$3.60.

Things worsened for Wynn Macau, too, which was down a further 27% following a 13% market capital loss reported on Monday; the most significant blow for any of Macau's concessionaires.

MGM China was also down some 20% from Monday, and Sands China 23%. Melco International Development was also hit hard with losses of 25%.

In truth, market losses are leaving none of Macau's concessionaires unaffected. However, Galaxy Entertainment was the least affected by the market pinch, 15% down from Monday's figures.

This is the second crash in as many weeks for Macau and has materialised following a travel ban implemented on local regions in the Guangdong province.



Alongside Macau's travel ban on incoming tourists, China as a whole has some 51 million people in lockdown.

The impact of Russia's war in Ukraine cannot be ignored either, as this has had a detrimental effect on stocks worldwide.

The amalgamation of these factors, particularly the negative impact of Covid-19, is what is driving the market downturn in what was once the most lucrative region for gaming in the world.

GI Verdict: Unfortunately for Macau's operators, the drop in share prices will be a running story for days and weeks ahead. The market has, since the outbreak of the Covid-19 pandemic, been acutely reactive to extenuating geopolitical and economic landscapes. There have been a lot of shifts in these landscapes, too, since 2020, which is the primary issue for Macau. With constant shifts in travel restrictions and social distancing rules, the Macanese market has yet to stabilise. And with this recent downturn, it's still unclear when and where it will.

SCCG MANAGEMENT

STEPHEN A. CRYSTAL

Founder and CEO, SCCG Management

Email stephen.crystal@sccgmanagement.com
Mobile / WhatsApp +1 (702) 427-9354

On the Web at sccgmanagement.com
igaminglaw.online
stephenacrystalesq.com

On LinkedIn at [linkedin.com/company/sccg-management](https://www.linkedin.com/company/sccg-management)
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JOHN FURY APPOINTED FREEBETS AMBASSADOR DESPITE SON TYSON BEING “AGAINST ADVERTISING GAMBLING”

John Fury, father of World Champion heavyweight boxer Tyson, has been appointed as a Brand Ambassador by affiliate Freebets.com.

As part of his new role, Fury will provide exclusive insight and previews on boxing fights, for Freebets’ website and social media channels. He will also be expected to participate in content used as part of advertising campaigns for additional sports, such as horseracing and football.

Freebets, which is part of XLMedia, offers bettors a comparative view of betting operators by ranking promotions, odds and bonuses.

Dominic Celica, Head of PR for EU Sports, XLMedia, commented: “John Fury is a huge signing for Freebets and we can’t wait to start work with him. With landmark events coming up – such as Tyson Fury’s final professional fight – we’re delighted to have John as our Brand Ambassador, bringing his wealth of knowledge and expertise to the table. “Freebets’ customers will benefit from

being able to engage with John’s sports betting insight and opinion. We have so much planned and there are so many exciting projects in the pipeline.”

GI Verdict: John Fury’s decision to partner with a gambling company is at odds with the values of his son, Tyson, who previously claimed he’d never support partnerships or advertising within the gambling industry.

In comments made in February this year, the WBC World Champion clearly stated he was against partnering with

gambling brands, as well as drugs, alcohol and CBD oils, having suffered with addiction in the past.

He said: “Alcohol, drugs and gambling is a no-no for me, because I have come from those dark places and I don’t want to return. I wouldn’t want anyone else to return there so I could benefit from a few extra dollars in my account.”

His statement came exactly three years after partnering with B2B gambling supplier, SBTech, to become a Brand Ambassador at ICE London.



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SPORTS BETTING DOWN BUT NJ GROWS OVERALL

New Jersey gaming revenue grew 29.49% year-on-year to \$373.26m for February.

Legacy gaming excluding iGaming and sports betting generated \$212.42m, growing 43.29%.

Sports betting revenue fell 33.19% to \$30.87m despite handle growing 32.66% to \$985.568m. Handle fell below \$1bn for the first time since August due to the winding down of the NFL season and the likely impact

from the launch of New York's online sports betting market.

Meadowlands, where Flutter's FanDuel, Pointsbet and SuperBook operate betting, lead sports betting market share at 45%.

iGaming revenue grew 38.57% to \$129.98m.

MGM Resorts' Borgata, where Entain and MGM Resorts' BetMGM operate, led market share at 29%.

REVENUE REPORTS: NJ

Of the 17 states that have reported in February, total revenue grew 33.94 percent to \$2.283 billion.

Year-to-date revenue has risen 32.73 percent to \$6.972 billion.

• NEW JERSEY. See commentary in Top Stories section above.

ALL-SOURCES REVENUE	FEBRUARY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Bally's AC (BALY)	\$12.166	+69.16
Hard Rock	\$44.766	+53.08
Resorts	\$51.887	+41.63
Ocean	\$30.837	+41.39
Borgata (MGM)	\$94.316	+39.45
Caesars (CZR)	\$29.182	+32.04
Harrah's (CZR)	\$19.557	+30.09
Golden Nugget	\$47.499	+29.03
Tropicana (CZR)	\$26.112	+18.51
Total Gaming	\$373.268	+29.49

MULTIPLE PROPERTIES	FEBRUARY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Caesars	\$75.407	+26.26

LEGACY CASINO	FEBRUARY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR	TABLE HOLD 2021	2020
Hard Rock	\$37.397	+54.71	18.6	11.8
Ocean	\$29.694	+57.67	24.7	15.7
Bally's AC (BALY)	\$10.737	+54.17	12.8	15.4
Golden Nugget	\$12.964	+47.72	23.6	18.1
Resorts	\$12.910	+44.08	13.7	10.2
Caesars (CZR)	\$18.750	+43.54	21.8	12.4
Borgata (MGM)	\$52.841	+42.99	17.4	17.3
Harrah's (CZR)\$	\$19.783	+31.17	18.4	18.1
Tropicana (CZR)	\$17.342	+8.17	16.1	14.4
Total Legacy Casino	\$212.419	+43.29	N/A	N/A

*Total Casino includes land-based and online casino

**Same store excludes Freehold Raceway, which began operating in September.

IGAMING	FEBRUARY REVENUE (M)	PARTNER	CHANGE (%) YEAR-ON-YEAR
Borgata (MGM)	\$37.831	ENT/MGM, Pala	+47.11
GNOG	\$34.560	FLTR, GAN, SGMS	+23.84
Resorts Digital	\$29.903	SGMS, FLTR	+51.56
Caesars (CZR)	\$10.066	888, SGMS	+17.62
Tropicana (CZR)	\$9.100	BALY	+39.77
Hard Rock	\$6.046	GiG	+33.49
Bally's AC (BALY)	\$1.350	PBH	N/A
Ocean	\$1.121	GAN	+32.40
Total iGaming	\$129.976	N/A	+38.57
Poker	\$153.938	N/A	+42.86
Online Casino	\$58.481	N/A	+44.46
Total Casino*	\$342.395	N/A	+41.46

SPORTS BETTING	FEBRUARY REVENUE (M)	OPERATOR	CHANGE (%) YEAR-ON-YEAR
Meadowlands	\$13.889	FLTR, PBH	-48.91
Resorts Digital	\$8.622	DKNG/Kambi	+11.71
Borgata	\$3.644	ENT/MGM	-26.55
Monmouth Park	\$1.532	CZR/RSI	-41.56
Hard Rock	\$1.323	GiG	+16.00
Freehold	\$1.120	Greenwood	N/A
Resorts	\$0.451	DKNG	+99.49
GNOG	\$0.405	GNOG	N/A
Caesars	\$0.366	N/A	-23.67
Bally's	\$0.080	SGMS/888	-64.91
Ocean	\$0.022	CZR	-98.96
Golden Nugget	(\$0.026)	DKNG/CHDN	-120.09
Harrah's	(\$0.225)	SGMS	N/A
Tropicana	(\$0.330)	CZR	N/A
Total Sports Betting	\$30.873	N/A	-33.19
Same Store**	\$29.387	N/A	-35.76

GUEST COLUMNIST



ADAM WILSON,
*FOUNDER AND
CEO, SPLASH
TECH*

**Wilson writes about
the importance
of micro jackpots
in sustaining the
gaming industry**

Lots of zeros make big headlines. You tend to read about high-profile athletes signing six-figure contracts (of which the vast majority do).

The same goes for gaming, of course, where the very biggest winners are celebrated for their success. A \$1.1m slot win from a \$5 spin, or an £11.50 (\$15.01) accumulator turned into £1m on Betfair: it's the big wins that grab the headlines and command our attention.

However, while the role of the big winners should not be undervalued, it's actually the micro jackpots – the regular

wins that don't grab headlines – that keep the ecosystem running well.

The free-to-play market is a crowded space: light (but now increasing) regulation means lower barriers to entry in an exciting industry. The mistake that many make when entering the market is thinking that it's enough to put a headline jackpot of \$1m behind a predictor game and let the good times roll.

From experience, while these 'aspirational jackpots' are key for user acquisition, they cannot be relied on to execute a successful free-to-play strategy. For this, you also must cover the other end of the user journey – retention. This is where 'obtainable jackpots' come in – the hard-working but oft-discarded member of the free-to-play family.

It's all well and good putting up a \$5m jackpot behind NFL Week 10. However, with a likely probability of a winner being in the region of 100 million/1, it doesn't take long for players to fatigue, quickly figuring out that their time is better spent elsewhere on something more likely... like winning the lottery.

However, obtainable jackpots, which are generally under \$100 and occasionally stretch up to \$1,000, fill this void. Every day (yes, free-to-play games should be daily, not weekly) you should be building your models around having

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at least one obtainable jackpot winner. This doesn't need to break the bank, but it will guarantee:

Trust – It doesn't matter how friendly your social media presence is, the vast majority of users have an us vs them mentality when it comes to betting & gaming. By having regular winners, users start to trust the brand, because of benefit #2...

Celebration – It doesn't matter if someone has won \$5 or \$5,000, any win is a reason to celebrate and celebration means communication. Build compelling reasons to communicate to your player base around actual, regular success stories, which lead to benefit #3...

Evangelists – Your winners become your biggest fans. Apprehension is turned into celebration and storytelling. When people win, they share it online, especially when it's free. Social posts, app store and Trustpilot reviews: positive sentiment is hard to build in this industry and you will find no better cheerleaders than your free-to-play winners.

The blueprint for a successful free-to-play strategy is not complicated, but it does take very careful planning and a very flexible platform that adjusts pay-outs in contests as your product grows. With just one of these two pillars, you will see some success, but with both mega and obtainable jackpots, your free-to-play products will thrive.

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