GI FRIDAY

Sponsored by

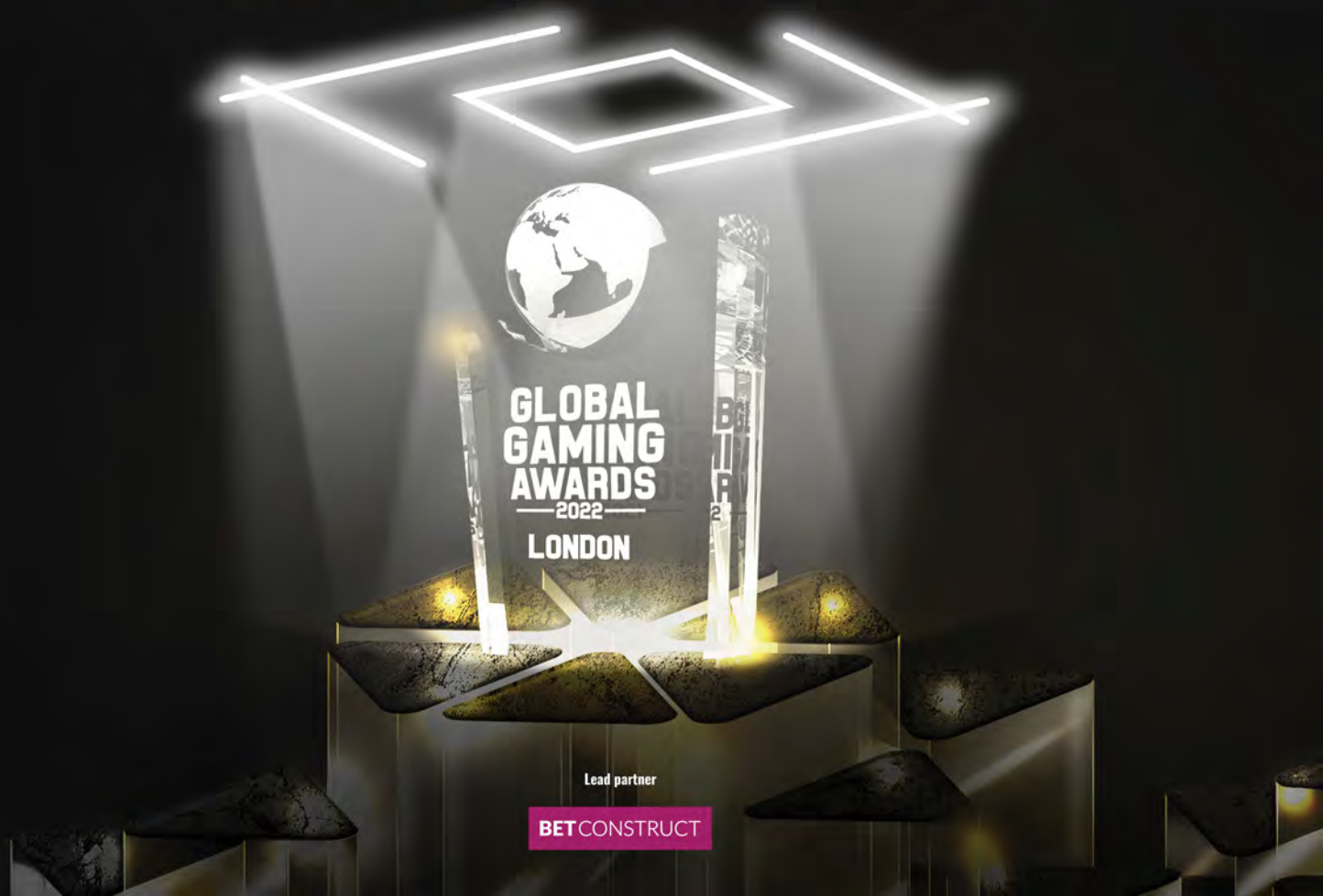
WEEK 15

FRIDAY 15 APR 2022

IN THIS WEEK'S ISSUE:

THE GLOBAL GAMING AWARDS WINNERS

THE WINNERS REVEALED



GI FRIDAY

Sponsored by

WEEK 15

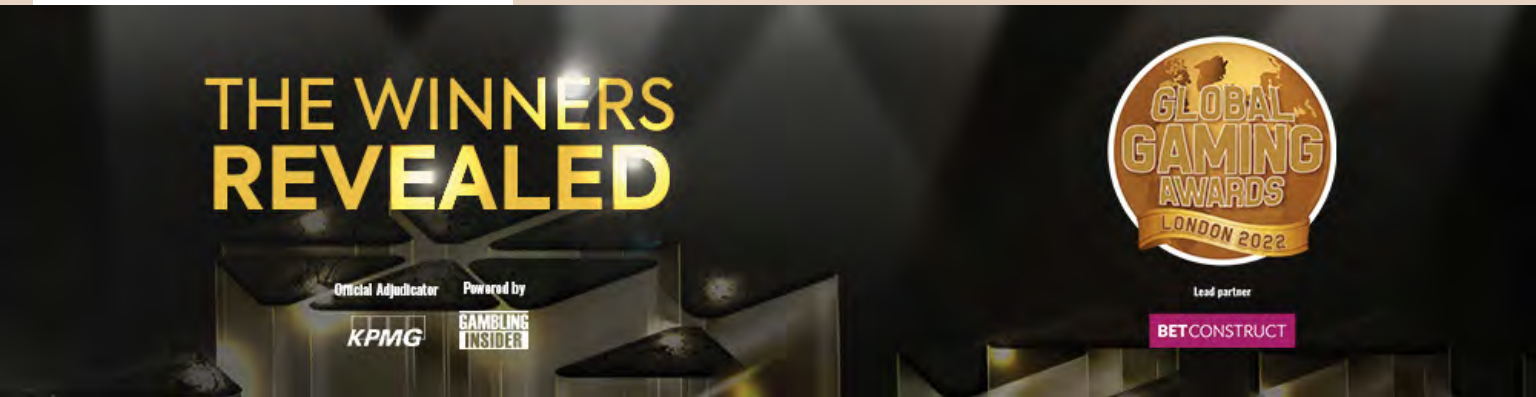
FRIDAY 15 APR 2022

REVEALED: THE WINNERS OF THE GLOBAL GAMING AWARDS LONDON 2022

THIS WEEK

- GLOBAL GAMING AWARDS LONDON 2022 WINNERS ANNOUNCED
- LIVE AT ICE INTERVIEWS: LEE RICHARDSON & BILL PASCRELL III
- **MARCH, NEW YORK:** $1.64BN IN SPORTS WAGERS
- **CONTINENT 8 MAKES PENNSYLVANIA MOVE**
- **6% MORE WOMEN SEEK** GAMBLING SUPPORT

GUEST COLUMN
Leon Allen, Cybersecurity Director, Continent 8 Technologies



As the Global Gaming Awards returned to the Hippodrome Casino in Central London, we reveal who took which titles home

The winners of the Global Gaming Awards London 2022 have been announced, following the ceremony at the Hippodrome Casino.

As always, KPMG in the Crown Dependencies has independently adjudicated the Awards process, which employs voters from across the industry, including leading executives and CEOs.

The voting process followed a window of self-nominations and recommendations by our esteemed Nominations Panel, before the wider team at *Gambling Insider* reviewed all submissions. Our much-revered Judges issued the final vote on this year's winners.

Unlike last year's virtual event, 2022 has seen the return of the Global Gaming Awards London in person, at The Hippodrome Casino in London.

Here, we break down the winners of the 2022 Awards, with a full list of the top three from each category at the foot of this page.

2022's big winners are **bet365** and **Kambi**, who have both taken home two Awards each. Bet365 has won the award for Online Sports Betting Operator of the year for the fifth year in a row, as well as bet365 Partners winning best Affiliate Programme.

Kambi has defended both its titles from the previous year, taking the gongs for best Retail Supplier and Online Sports Betting Supplier of the Year.

LeoVegas has held onto its monopoly for the Online Casino of the Year Award, winning every year since the inception of the Global Gaming Awards London.

Operator **Paddy Power** has also held onto its status as best Betting Shop Operator, pipping William Hill to the Award this time around.

As well as high-flying operators hanging onto their Awards, suppliers too have been staunch in the defence of their titles.

IGT has once again been awarded Casino Supplier of the Year, while **Evolution** has retained its crown in the online space, taking home the Online Casino Supplier of the year Award.

This year's race for the best Casino Product was particularly tight; so tight, in fact, that there are joint winners. Both **Oryx Gaming's - Fuze™** and **Pariplay's Fusion** finished as joint winners.

And it's **The Hippodrome Casino** which has taken the crown as Best Casino, trumping the Casino de Monte-Carlo and The Londoner Macau.

The Award for best Service Provider has gone to **Internet Vikings**, which has been recognised for its hosting solutions, while **NetEnt's Gordon Ramsay Hell's Kitchen™** won Product Lauch of the Year.

Both Paysafe and Nuvei were listed among the best payment solution providers for gaming-related sites, but it was **Trustly** who took the gong as best Payments Solution.

Kindred Group received the accolade in the Social Responsibility category, while this year's Executive of the Year was awarded to **Denise Coates, Founder and Joint CEO** of bet365.

GLOBAL GAMING AWARDS LONDON 2022 WINNERS AND RUNNERS-UP LIST:

BETTING SHOP OPERATOR

1. Paddy Power
2. Fortuna Entertainment Group
3. SAZKA Group

ONLINE SPORTS BETTING OPERATOR

1. bet365
2. Parimatch
3. Betsson

RETAIL SUPPLIER

1. Kambi
2. Golden Race
3. Inspired Entertainment

ONLINE SPORTS BETTING SUPPLIER
1. Kambi
2. Sportradar
3. Pronet Gaming

CASINO
1. The Hippodrome Casino
2. Casino de Monte-Carlo (Société des Bains de Mer)
3. The Londoner Macao (Sands China)

ONLINE CASINO
1. LeoVegas
2. PokerStars
3. BitStarz

CASINO SUPPLIER
1. IGT
2. Scientific Games
3. Novomatic

ONLINE CASINO SUPPLIER
1. Evolution
2. Pragmatic Play
3. Playtech

CASINO PRODUCT
1. Joint winners: Oryx Gaming – Fuze™ & Pariplay – Fusion
2. Third / Runner-up: Relax Gaming – Top Dawg$

PAYMENT SOLUTION
1. Trustly
2. Paysafe
3. Nuvei

SERVICES PROVIDER
1. Internet Vikings
2. Continent 8 Technologies
3. Maxima Compliance

PRODUCT LAUNCH
1. NetEnt - Gordon Ramsay Hell's Kitchen™
2. Virgin Bet – Virgin Bet Fives
3. Pinnacle – Esports Hub

AFFILIATE PROGRAM
1. bet365 Partners
2. Kaizen Gaming
1. 1xBet Affiliates

SOCIAL RESPONSIBILITY
1. Kindred Group
2. Entain
3. Microgaming

EXECUTIVE OF THE YEAR
1. Denise Coates – Founder & Joint CEO, bet365
2. Jette Nygaard-Andersen – CEO, Entain
3. Itai Pazner – CEO, 888 Holdings

THIS WEEK IN NUMBERS

£40bn

Raised for charity by Camelot in its time as NL operator

12.75

Million bets placed with Entain at the Grand National

51%

Tax rate for online sports books in New York

25%

Of Casino arrests are employees

$300m

Revenue generated by New York sports books

LIVE AT ICE EXCLUSIVE INTERVIEW: LEE RICHARDSON, CEO OF GAMING ECONOMICS

Hi Lee. How is it being back at ICE after two years?

There's been a good turnout. Certainly, in the lead-up to this, I know clients who have had twice as many people visit their stools as they would normally expect. On the other hand, clients from Australia haven't turned up at all, so it's somewhere in between being back to normal. But it's certainly been busy in the middle of day 1, which is a good sign.

What do you make of the story, that Camelot has lost its licence to operate the UK's national lottery, a licence it has held since 1994?

To give a bit of context, I was involved in the bidding process that's been going on for almost two years which started in the summer of 2020. With the UK national lottery, we are talking about a 10-year licence from 2024 to 2034. Camelot has been the incumbent lottery supplier for almost 30 years. Putting this into context, the UK would've been one of the last major countries to have a national lottery. It's become, over the last 30 years, one of the most efficient lotteries in the world. Around 95% of the money is returned to the Government, charities, or the players. It's the single most popular form of gambling, as a channel in the UK; it has been for a generation. It has raised around £40bn for good causes throughout its time, and a further £20bn in lottery duty. So, both in terms of taxes and good causes it has been phenomenal.

I think we've seen several things throughout this bid competition. When it started it was entirely a retail operation, now it is online. Online services have become an incredibly important part of how you deliver a national lottery. I think online services are the basis on which Camelot, currently, has lost that bid; Allwyn has been declared the winner.

I notice the emphasis you've put on the word currently. There's been an appeal from Camelot to be reinstated. Do they have a chance, or is it all over?

First of all, the way that the UK Gambling Commission makes this decision, is that they will always have a winner and an underbidder. This is done in case anything happens with the contract negotiator of the third supplier. If something does happen, they have a number two to step in. We've been here before around 20 years ago when an Indian operator was named winner and Camelot as the underbidder. 20 years ago, Camelot successfully claimed that they should be awarded the contract, and they were. So, we don't quite know where we are with things. We know there has been an appeal and we know this will go to the High Court, and it will be interesting to see the grounds on which Camelot are claiming they should be allowed to retain the lottery contract.

If I'm being brutally honest, it is very clear that Camelot is under threat, without any question. The fact can't be ignored, that they lost millions of regular players on draw-based games when things moved online. If you analyse Camelot's online performance, it was inferior to many other lotteries of similar size around the world. Also, if you look at scratch card segments, they were underperforming here too which is an important area. In the US, for example, scratch cards are the majority of the margin that lottery players make. But, for the UK it was a vast minority. There were certainly warning signals I think, that Camelot was under pressure. A properly prepared bid, that would improve these areas of underperformance, and increase the amount of money generated for good causes, would always have put Camelot under threat. That is what we are seeing now. Camelot has now been forced to go to the High Court to see if they can retain the lottery licence for the fourth time.

Theoretically, after so much time with one operator, is it better to change it up and with someone new or does the incumbent have internal advantages for the length of time it has held the licence?

That's a tough question. People have said in the past that there is a lot of bias to the incumbent. The incumbent was always in a very strong position. As a small example, there are around 46,000 retail outlets that sell lottery products. That is a huge network, and it takes a lot of time,

97%

Of healthcare professionals can identify gambling issues with training

2,000

Titles in mobile operator Casumo's portfolio

15%

Increase in number of Kings Entertainment lottery players

money, and effort to put that in place. One of the challenges for anyone coming in, in this case, Allwyn, is that there is a 2-year transition period in which to build a network. However, the retail offer from Camelot has been looking tired; it's been 7 years since it has last been refreshed. It was very clear, particularly after the pandemic, that Camelot was not going to spend any more money on its retail offering. Camelot was hoping to reinvest after its contract was renewed. So, whilst the incumbent does have an advantage, and there is a strength to being in place as the current operator, at the same they knew the real economics. So, they took a tangible decision not to reinvest in the all-important retail segment. Even in the online age, more than 50% of every pound that is spent in the national lottery is spent in a retail environment; supermarkets, corner shops, etc. This sector is still incredibly important. One of the things that Allwyn, the winner thus far, has said is that it will invest in both the online and retail offers.

"I think it's odds-on that it will be Allwyn"

Final question, I'm going to put you on the spot. Come 2024, will Camelot still be in the hot seat, or will it be Allwyn?
I think it's odds-on that it will be Allwyn. I think the process of the bid competition was robust; it was certainly extended once or twice, partly due to the pandemic. But I think it was a robust process overall, and certainly, from my experience, everyone knew exactly what was asked of them. I can't think that any of the bidders didn't believe they had ample opportunity to make their case. The bidding process was a scored exercise as you would expect, a lot of time and money were spent. At this stage, I would be surprised if the Gambling Commission reverses the decision away from Allwyn and back towards Camelot. But never say never as they say. However, I do believe that Allwyn will be the new operator, delivering lottery products from 2024.

THE WEEK IN QUOTES

"At this stage, I would be surprised if the Gambling Commission reverses the decision away from Allwyn and back towards Camelot. I do believe that Allwyn will be the new national lottery operator"

Lee Richardson, CEO of Gaming Economics on his views regarding the UK's next national lottery operator starting 2024.

"Entain are funding research on how to get a good handle on Responsible Gambling. If we don't stay ahead of the curve in the US, we're one news article away from regulators and politicians cracking down. If we get there, unfortunately, there's no turning back"

Bill Pascrell III, Lobbyist, Princeton Public Affairs Group, on his work with Entain to try and enhance Responsible Gambling initiatives in the US.

LIVE AT ICE EXCLUSIVE INTERVIEW: BILL PASCRELL III, LOBBYIST, PRINCETON PUBLIC AFFAIRS GROUP

Hi Bill. How does this edition of ICE feel, particularly after two years away?
This is my 13th year at ICE. We missed last year but the circumstances were understandable. It's great to be back, especially as the right people are here this year. It's been a fantastic 36 hours so far, so hats off to everyone who managed to get ICE going this year.

Can you give us some background on what you've done concerning sports betting? PASPA (Professional and Amateur Sports Protection Act of 1992) almost seems a distant memory now, but was it a long time coming for you?
It was a very long process with PASPA. About 11 or 12 years ago I was hired by several organisations to bring sports betting into America. To be quite candid, I never really thought it was an issue because I always gambled from the street from local bookies. Law enforcement never really cracked down on it. I lost quite a bit of business during this period because quite a few of my clients were not in favour of legalising sports betting, particularly those from Vegas. I was also in a fist-to-cuffs battle with the NFL. But, that's OK, because the best way to address the black market and RG, in terms of the US at least, is to regulate; to legalise sports betting. That 10-year battle ended in 2018 when we won the right to legalisation. This was incredible really as no one gave us a chance. But that's all done, we now have 30 States, plus the District of Columbia, with more States beginning to roll out legal sports betting, so it's been a wonderful four years.

How do you look back on PASPA? Is it with disbelief at how far things have come from back then?
It was a bit scary during the PASPA process

"We are proud to be the first service provider to offer this regulated community cloud solution in the state; we understand the power of the first-mover, pay-as-you-grow advantage in such highly competitive states and markets"

Justin Cosnett, Chief Product Officer at Continent 8, on the company's expansion into the Pennsylvania gaming market.

"We're excited for the opportunity for our award-winning journalists to offer their perspective to the NewsWire audience, and to be a part of SportsGrid's broad multimedia platforms"

Benson Taylor, Editor-in-Chief at Sporting News Global on a new collaborative partnership with SportsGrid, aimed at delivering a new readership offering; NewsWire.

because you start to doubt yourself. I remember coming to ICE and preaching about it quite a few times. I never thought it would drag out quite as long as it did, but I'm a forward-thinking person. I learned a valuable lesson from this, which is when you feel positive about something, it happens in the end. It's been extraordinary, it's been emotional and gratifying. It's also been extraordinary in a commercial sense for me. It was only 30 days after PASPA's legislative repeal that we launched a new legislature with the Governor of New Jersey, Phil Murphy. And now, New Jersey is the third-largest sports betting jurisdiction in the world. Not the US, just New Jersey alone.

New Jersey is still going strong; what do you make of how things are going in New York since it started sports betting operations?
I say this with deep affection; not tongue in cheek. New York is now the socialist gaming empire state of the world. When you tax something at 51%, that's socialism, pure and simple. The books can barely make a profit with a low tax rate, such as the one New Jersey has at 13.5%. 51% is God awful, so I believe New York will revisit that. But, it's very hard to lower taxes in America. But I also think that the players that launched, are going to be hiring bus, train and limousine services to transport their customers back to Jersey. I don't think it's sustainable under the current model. What New York should do is look at what New Jersey's done. That isn't to say taxes should be lowered to 13.5%, but they should be lowered. If not, operators won't have a chance to grow. I don't think operators will be able to sustain the first month they had, and they haven't come out with numbers since.

You touched on responsible gambling (RG) earlier. I know you're doing a lot of RG work with Entain, can you tell us about that?
I'm very proud of my 12-year representation of what was formally GVC, now Entain. I was brought in early to help get them licenced, and they weren't very optimistic at first on the potential success rate for sports betting, despite my advisory role. I'm also very proud to join the foundation of Entain, which is focused on integrity, compliance and RG. I believe that what we've been discussing and doing at Entain is to work furiously, crisscrossing the country to talk about the importance of RG. But, not just to talk about the problem, but to come up with solutions for the problem. We've been devising the best ways to come up with adequate player protection, safety and security and consumer protection. We don't just want a 1-800 number on a consumer-facing page, but we want a strong back end to that. So, that means coming up with innovations and data protection that can help individual players understand when they're creeping into the red zone of problem gambling. Gambling should be used as entertainment, or for hospitality purposes, not as a coping mechanism.

What does the US need to do to catch up with a mature market like the UK, when it comes to responsible gambling? How do you compare where US gambling should be, to where it currently is regarding RG?
First of all, one of the things I and others have been preaching in the US is to be careful and look at the history books to see what's happened in the UK. We all know what's happened in the UK and it's still happening. But I don't mind saying that as an American, we are very behind the times. We're behind when it comes to online gaming, sports betting, esports, crypto, NFTs, blockchain, all of it. We are way behind in all of these areas. We're way behind the times, but I think the US just needs a chance to catch up. I think the US will get it right eventually. The most important thing the US can do is to stay ahead of the curve on RG. So, we're meeting with regulators and trying to collaborate with them using Entain's technology. This tech is going to be launched soon. We also want to form coalition partnerships, such as with the Harvard Medical School, where we are funding research on how to get a good handle on RG. Entain is also working with the Oakley Foundation, to allow people to download an app so that they can track their betting behavior. The tech on the app can tell you to slow down, or cool off for 15 minutes, etc. If we don't stay ahead of the curve in the US, we're one news article away from regulators and politicians cracking down. If we get there, unfortunately, there's no turning back.

TAKING STOCK

SHARE PRICES COVER THURSDAY 7TH APRIL TO WEDNESDAY 13TH APRIL (20:00 GMT)

Caesars Entertainment 70.95 USD	↑	1%
Bally's Corporation 28.44 USD	↑	2%
Las Vegas Sands 36.35 USD	↑	1%
MGM Resorts 41.58 USD	↑	6%
Wynn Resorts 73.94 USD	↔	0%

THE MARCH TO $5BN: NEW YORK SEES $1.64BN IN SPORTS WAGERS; $114.3M IN REVENUE

January to March saw almost $5bn worth of online sports wagers in the state of New York, with over $300m in revenue generated during the period.

That tally follows another positive month for the region, as March Madness inevitably drew sports bettors to their apps and browsers in the third calendar month of 2022.

New York's online sportsbooks saw $1.64bn in handle (total wagers) for the month of March, according to the New York State Gaming Commission.

That figure is up 7% month-on-month, though just below January's total of $1.67bn.

In terms of revenue, New York's mobile sports betting outlets generated considerably more than the previous month.

While February's sports betting activity saw operators win $82.4m, with players betting a little less and winning a little more overall, March generated gross revenue of $114.3m.

Looking at year-to-date figures, which is essentially a Q1 report at this stage, New York has generated $4.8bn in wagers, with $320.8m in gross revenue.

Flutter Entertainment-owned FanDuel has been the clear market leader during the early showings of New York's legal online sports betting market.

Caesars is still packing a punch, despite dipping since its opening-week numbers, while DraftKings also has a significant share of the market (more so than Caesars, in fact).

FanDuel's lead is such in New York, however, that its share is more comparable to that of Caesars and DraftKings combined.

GI Verdict: These are significant figures for New York's sports betting market, and undoubtedly a product of the fierce battle between operators to dominate New York's online sports betting market. Caesars had led the way at the start of the year in year-to-date revenue, only to see Flutter's FanDuel push them back significantly in the last two months. DraftKings has been very active too; it is this three-way competition that has cultivated a thriving market in New York.

CONTINENT 8 GAMING CLOUD GIVEN GREEN LIGHT IN PENNSYLVANIA

Continent 8 has launched its regulated Gaming Cloud in Pennsylvania following approval from the state's Gaming Control Board (PGCB).

The managed hosting, connectivity, cloud and security provider's public gaming cloud will be available to all operators and suppliers active in Pennsylvania.

Continent 8's move follows a recent expansion into Canada's gaming market, where it went live in Ontario. The provider's cloud is already available in 24 regulated US states, including New Jersey.

The PGCB has deemed that Continent 8's cloud software meets regulation standards, with the provider's hardware being located at both primary and backup locations in Pennsylvania. These locations join the three existing data centres Continent 8 already has in the state.

The provider claims to work closely with all regulators across the North American market, to achieve full compliance and gain a first-mover advantage in each state that it moves into.

"The PGCB has deemed that Continent 8's cloud software meets regulation standards, with the provider's hardware being located at both primary and backup locations in Pennsylvania"

Continent 8's Managing Director, Nick Nally, has spoken on the provider's Pennsylvania expansion.

He said: "Receiving approval from the Pennsylvania Gaming Control Board for our Gaming Cloud forms part of our aggressive strategy to deliver our regulated cloud to multiple new states in the US, as demand for our cloud solutions continues to rise."

And Justin Cosnett, Chief Product Officer at Continent 8, added: "We are proud to be the first service provider to offer this regulated community cloud solution in the state; we understand the power of the first-mover, pay-as-you-grow advantage in such highly competitive states and markets."

The company hopes to remain the "go-to" hosting and connectivity provider in North America.

GI Verdict: Continent 8's expansion into Pennsylvania shows the provider is sticking to its aggressive strategy, moving swiftly into all of America's regulated markets. After having only just launched in Ontario, Canada, Continent 8 is displaying real ambition as it tries to stay ahead of the curve and beat its competitors.

GAMCARE NOTES 6% INCREASE IN NUMBER OF WOMEN SEEKING GAMBLING SUPPORT

The UK gambling support charity GamCare has detailed a 6% increase in the number of women accessing gambling support in the UK over the last year.

The charity, which trains healthcare organisations, feels its GamCare Women's Programme is likely to have positively contributed to increased numbers of women coming forward for support.

With up to one million women at risk of gambling harm in the UK, GamCare feels it is vital women have access to support. The charity cites claims that women may be disproportionately affected by gambling-related harms, including financial, relationship and mental health issues.

An independent evaluation report produced by inFocus Consulting found that 85% of GamCare Women's Programme participants improved their understanding of gambling-related harm. This included how to best identify women in need of gambling-related support.

GamCare has delivered training to 918 healthcare organisations across the UK in the last year. The charity claims 97% of healthcare professionals understood how problem gambling can impact women, with 96% claiming they could better identify a woman suffering from gambling-related harms following training.

"With up to one million women at risk of gambling harm in the UK, GamCare feels it is vital women have access to support"

GamCare notes that before training, 81% of healthcare professionals successfully identified all risk factors associated with problem gambling in women. This jumped to 87% following the completion of training.

And GamCare hopes to see these figures improve, with one GamCare staff member feeling awareness of women's gambling issues is still garnering attention.

They said: "I think it's just getting out there in public. When we look at mental health, it's screamed about everywhere, but nobody says that sometimes the causation of these mental health problems might be gambling... particularly when it comes to women."

GI Verdict: GamCare's research and training to healthcare providers, on the signs to look out for in women with gambling problems, will be highly valuable in better treating women with gambling addictions. This is a deeply understudied area, with most research pertaining to problem signs seen in men. It could well be that GamCare's research sees more wider and far-reaching studies undertaken into the effects of gambling on women.

STATE REVENUE MIXED

Most recently, Iowa reported a year-on-year decline of 1.11% to $178.068m and Missouri grew slightly by 0.05% to $176.745m.

MULTIPLE PROPERTY OPERATORS IN IOWA AND MISSOURI:

OPERATOR	MARCH REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Penn	$64.249	+17.64
Boyd	$68.358	+0.19
Caesars	$81.506	-6.01
Affinity	$12.820	-9.11

MISSOURI MARCH REVENUE

OPERATOR	MARCH REVENUE (M)	CHANGE (%) YEAR-ON-YEAR	LICENSEE
DraftKings (DKNG)	$11.501	+5.78	DRAFTKINGS AT CASINO QUEEN
FanDuel (FLTR)	$11.148	N/A	FAIRMOUNT PARK
BetRivers (RSI)	$7.407	-0.86	RIVERS DES PLAINES (CHDN/RUSH ST)
PointsBet (PBH)	$3.166	-21.05	HAWTHORNE
Barstool (PENN)	$2.104	+991.01	JOLIET HOLLYWOOD (PENN)
Caesars (CZR)	$0.137	-81.86	ELGIN (CZR)
Barstool (PENN)	$0.119	-72.26	ALTON BELLE (PENN)
BetMGM (ENT/MGM)	$0.019	-99.84	PAR-A-DICE (BYD)
Total	**$35.600**	+0.58	

DATA CENTRE

Provided by *fantiniresearch.com*

FR FANTINI RESEARCH

IOWA MARCH REVENUE

OPERATOR	REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Diamond Jo Dubuque (BYD)	$10.844	+22.79
Harrah's (CZR)	$7.087	+5.41
Diamond Jo Worth (BYD)	$12.336	+4.98
Horseshoe (CZR)	$19.587	+3.59
Casino Queen Marquette	$1.812	+3.54
Ameristar (PENN)	$18.596	+2.78
Riverside (Elite)	$12.808	+1.54
Hard Rock	$9.202	+1.48
Isle Waterloo (CZR)	$10.044	-1.94
Rhythm City (Elite)	$11.164	-4.29
Wild Rose - Emmetsburg	$3.720	-4.63
Grand Falls (Elite)	$8.641	-4.79
Prairie Meadows	$22.077	-6.44
Wild Rose – Jefferson	$4.705	-9.22
Wild Rose – Clinton	$4.090	-10.08
Terrible's Lakeside (Affinity)	$4.758	-11.09
Isle Bettendorf (CZR)	$6.941	-11.23
Q casino	$4.794	-11.77
Catfish Bend	$4.860	-11.84

Total	**$178.068**	**-1.11**
Total, excluding sports betting	**$163.657**	**-1.77**

SPORTS BETTING	REVENUE (M)	CHANGE (%) YEAR-ON-YEAR	LICENSEE
Diamond Jo Dubuque (BYD)	$3.896	+101.29	FLTR
Diamond Jo Worth (BYD)	$2.619	+49.11	FLTR/MGM/ENT
Wild Rose - Jefferson	$1.440	-12.79	DKNG / RSI
Prairie Meadows	$1.091	-18.39	CZR
Wild Rose – Clinton	$0.917	-15.28	DKNG / RSI
Ameristar (PENN)	$0.896	+4.97	SCR
Wild Rose - Emmetsburg	$0.815	-14.80	DKNG
Isle Waterloo (CZR)	$0.492	+15.13	CZR
Catfish Bend	$0.479	-37.48	PBH
Horseshoe (CZR)	$0.467	+1.24	CZR
Isle Bettendorf (CZR)	$0.338	+16.34	CZR
Riverside	$0.228	-34.86	ELITE
Grand Falls (Elite)	$0.197	-56.00	BETFRED
Hard Rock	$0.187	+0.72	DKNG / RSI
Harrah's (CZR)	$0.180	+64.08	CZR
Rhythm City (Elite)	$0.041	-88.12	ELITE
Terrible's Lakeside (Affinity)	$0.032	-91.20	CZR
Casino Queen Marquette	($0.004)	N/A	

Total Revenue	**$14.411**	+7.11
Total, excluding sports betting	**$233.525**	+44.65

DATA CENTRE

Provided by *fantiniresearch.com*

MISSOURI MARCH HANDLE

OPERATOR	MARCH HANDLE (M)	CHANGE (%) YEAR-ON-YEAR	LICENSEE
FanDuel (FLTR)	$212.484	N/A	FAIRMOUNT PARK
DraftKings (DKNG)	$212.231	+6.25	DRAFTKINGS AT CASINO QUEEN
BetRivers (RSI)	$117.178	+21.53	RIVERS DES PLAINES (CHDN/RUSH ST)
PointsBet (PBH)	$59.921	+48.69	HAWTHORNE
Barstool (PENN)	$54.877	+6,357.23	JOLIET HOLLYWOOD (PENN)
Caesars (CZR)	$17.595	+74.92	ELGIN (CZR)
Barstool (PENN)	$3.120	+14.51	ALTON BELLE (PENN)
Barstool (PENN)	$1.438	+75.73	AURORA HOLLYWOOD (PENN)
BetMGM (ENT/MGM)	$0.531	-99.67	PAR-A-DICE (BYD)
Total	**$679.374**	**+33.26**	

MULTIPLE PROPERTIES	REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Boyd	$23.181	+12.62
Caesars	$43.659	-0.08
Elite	$32.613	-2.22
Wild Rose	$12.515	-8.19

LEON ALLEN,
CYBERSECURITY DIRECTOR, CONTINENT 8 TECHNOLOGIES

Allen, Cybersecurity Director at Continent 8 Technologies, discusses the key highlights from an informative report on the cyber threats faced by the UK gambling industry

Assessing the cybersecurity threat level

The National Cyber Security Centre (NCSS) recently commissioned Ipsos MORI to conduct a study into cybersecurity practices specifically within the gambling and lottery sector in the UK.

As one of the most attacked industries globally, the report offers an insight into the most common cybersecurity threats the industry is currently facing.

I thought it would be valuable to take a closer look at the report and pick out some of the key takeaways regarding the cyber threats faced by iGaming businesses (not just in the UK) and then talk about what can be done to mitigate the risk of falling victim to an attack.

First up, the threats being faced. These are the most prevalent forms of attack identified by the NCSS report:

"The first step should be to identify your 'crown jewels' and to ensure they are appropriately protected"

Credential stuffing

This is the practice of cyber criminals using fraudulently gained valid combinations of credentials, such as usernames and passwords, from one compromised site to access another.

The report noted that this is the most prominent and commonplace form of attack experienced by IT professionals

within the industry, but that it is seen by most as having "only a limited impact" on the organisation. The 'limited impact' really depends on the type of credentials that have been compromised, for example, customer versus IT administrator. In the case of a customer compromise, the biggest concern is reputational damage.

DDoS

This is an attack designed to send an inordinate amount of information to render a targeted service inaccessible to users. In the case of an online casino, this could mean the player is unable to access their account or play games.

The report noted that there had been a rise in the number of attacks in early 2020 during the peak of the Covid 19 pandemic driven "by a combination of boredom and opportunism".

Our own data shows this trend continued throughout 2021 and into 2022. And, not only in terms of the number of attacks but also the size of attacks. In 4Q21 we blocked 641 DDoS attacks against our customers, up from 546 in the previous quarter. It is worth noting that the Q3 number was more than double that recorded in the second quarter.

Ransomware

This is a type of malware that prevents individuals and organisations from accessing their computers, devices and systems, by encrypting those devices. Attackers will then ask for a payment to unlock the affected computer.

According to the report, ransomware is the "most severe threat" to organisations both in terms of having the requisite skills and technologies to defend against a possible attack and the subsequent impact of a successful attack.

Some of those interviewed for the report said that ransomware attacks had become more targeted, better planned and more aggressive in their demands for payout.

This is what one cybersecurity lead for a UK based gambling provider had to say about their experience of ransomware:

"I think the sophistication is notably different to 12 months ago. Attacks are harder to detect than they were. The higher-end attacks, things like less commodity attacks, are more thought through and planned. And I think people have realised that some companies are paying up and so there's a lower barrier to entry than other types of attacks and frauds. And it can all be done remotely."

Reliance on third-party suppliers

One of the most interesting findings to come out of the NCSS report was the reliance on third parties, and in particular game studios and content providers, and the impact this has on security.

All of the organisations interviewed for the report use a large number of third-party providers, ranging from between 75 and 10,000.

The report highlighted a number of risks of using third parties to such a great extent, including the confidentiality of user data as well as the increased risk of cyber attacks against their own systems and networks if a third-party provider were to become compromised.

If you use third-party providers, treat them with the same level of diligence as if they were directly part of your business. Request to see their security strategy and ensure it meets the same standards as your core business.

"The report noted that this is the most prominent and commonplace form of attack experienced by IT professionals within the industry"

Multi-attacks require multi-layers

The best way to successfully mitigate the risk of falling victim to a cyber attack is to take a multi-layered approach to security.

The first step should be to identify your 'crown jewels' and to ensure they are appropriately protected. Protection should cover the data, endpoints, applications, and network layers of your business to protect against the different types of threats. The defences, such as DDoS, WAAP, SIEM/SOC and EDR/MDR, operate together to protect an organisation.

If the NCSS report tells us anything it is that there has never been a more important time to review your security strategy.

Produced and published by Players Publishing Ltd. Curated by **Tim Poole** (Tim.Poole@gamblinginsider.com) with contributions from the *Gambling Insider* team.

THE WINNERS REVEALED

Lead Partner

BETCONSTRUCT

Category Sponsors

ALTENAR · DIGITAIN · BRAGG · SOFTSWISS WINNING COMBINATION · FELIX GAMING

BGAMING · STAKELOGIC THINK BIGGER · EGT INTERACTIVE · TRU//ST PAYMENTS · AstroPay SIMPLE, MONEY.

SPORTING SOLUTIONS GROUPE FDJ · PRONETGAMING TRUSTED . TAILORED . DELIVERED · smartico · Neosurf So Simple to Pay & Play Online · GAMING SOLUTIONS GROUPE FDJ

Official Adjudicator KPMG

Powered by GAMBLING INSIDER