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WEEK 26

FRIDAY 1 JUL 2022

IN THIS WEEK'S ISSUE:
STRIKE 3 FOR ATLANTIC CITY? & US ROUND-UP

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THIS WEEK

- NATIONAL LOTTERY LICENCE PROGRESS FOR ALLWYN
- FREE BET BAN IN THE UK?
- HOMECOMING FOR POKERSTARS
- NEOGAMES CELEBRATES SAMBA SIGNING
- MORE BAD NEWS FOR CAMELOT...
- ORIANA BRANON JOINS THE ARISTOCRACY

GUEST INTERVIEW

Martin Dachsel,
CEO, Bayes Esports

WEEK 26

FRIDAY 1 JUL 2022



STRIKES LOOM OVER ATLANTIC CITY

US ROUND-UP: NFL, PROBLEM GAMBLING COUNCIL, KAMBI & MORE



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Atlantic City is getting ready for an “action-packed” Fourth of July weekend... but labour disputes threaten the plans of casinos

While most people work on their beach bodies in preparation for a summer without Covid restrictions, something's going down in Atlantic City. As holidaymakers prepare to descend on AC this Independence Day weekend, the destination's nine casino licensees are gearing up for a busy few days.

“The Fourth of July weekend is always action-packed in Atlantic City and this holiday weekend will be no exception,” said Michael Chait, President of the Greater Atlantic City Chamber.

“We are optimistic that this summer will bring a much-needed boost to the local and regional economy.”

Unfortunately, a local union has other plans. But let's wind things back a bit. On 1 June, casino workers' contracts expired and Unite Here Local 54, a union representing said workers, is now pushing for higher wages.

Atlantic City's land-based operators have rebounded from Covid-19. Local 54, though, says it's time they gave something back in recognition of employee loyalty.

But the casinos – specifically Borgata, Caesars, Harrah's, Tropicana and Hard Rock – did not agree to Local 54's demands. According to the union, casino owners are “refusing to raise wages for their underpaid staff,” who earn on average \$11.74 an hour. Put simply, the union claims that wages have not kept pace with operators' profits and a standoff has ensued. But who will blink first? In mid-June, Local 54 members overwhelmingly voted to authorise strikes in July if their demands were not met.

At the time, Local 54 President Bob McDevitt said: “For decades, thanks to a strong union, casino jobs have lifted workers into the middle class here in Atlantic City.

“Now, Wall Street billionaires want to squeeze out every possible dollar for themselves and their investors, leaving workers to scrounge for the crumbs.

“Today's vote is a clear sign that the workers of Atlantic City will not allow that to happen.”

But an agreement hasn't been reached and the union's negotiating committee is clear to call a strike at Borgata, Caesars, Harrah's and Tropicana, and at Hard Rock from 3 July.

To make matters worse, Caesars Entertainment and MGM Resorts stand to lose millions if strikes go ahead – or at least according to Local 54 they do. Caesars operates Harrah's, Tropicana and, of course, Caesars Atlantic City, while MGM Resorts operates Borgata. Since Covid restrictions were lifted, the East Coast gaming hub has undergone a fairly strong recovery. For Q1, Borgata, Hard Rock and Tropicana all exceeded their comparative pre-pandemic profits.

However, if strikes do take place next month, this recovery could be placed in jeopardy. The union offered daily EBITDA loss scenarios based on year-on-year revenue reductions of 20%, 25% and 30%.

According to Local 54, the largest of these three could see Caesars suffer a nearly \$1.2m EBITDA loss per day. MGM Resorts would fare even worse, facing a potential \$1.8m daily EBITDA loss.

In addition, the strikes would take place over the Fourth of July weekend and threaten operators' business during what is normally a busy period. The City Council of AC also voiced its support for higher wages last week, and called on casino operators to negotiate in good faith and avert a strike.

“We have told the companies that we are available days, evenings and weekends to negotiate,” added McDevitt.

“The ball's in their court. They need to offer these workers a fair contract. We gave up a lot when times were bad; now that they are making money, they need to give back to us.”

So how has Atlantic City's casino industry responded? Well, the Casino Association of New Jersey (CANJ) has maintained radio silence. At the time of writing, it has not published a statement on the labour disputes.

Instead, CANJ, on behalf of the city, is getting ready to welcome visitors this weekend; promoting a range of activities to attract new and returning customers alike.

“Wall Street billionaires want to squeeze out every dollar for themselves and their investors, leaving workers to scrounge for the crumbs” – Bob McDevitt

CANJ President Joe Lupo commented: “This summer, our casinos are feeling a renewed sense of energy and excitement return to Atlantic City. There is something for everyone here in Atlantic City. We can't wait to welcome new and returning guests to enjoy our world-class entertainment options, and experience first-hand all that our beachfront destination has to offer this Fourth of July weekend.”

However, the East Coast gaming hub did host a citywide job fair on 2 June, possibly hinting at its concern over labour shortages during the Fourth of July weekend and busy summer season.

GI Verdict: Independence Day weekend is normally a highlight of the casino industry calendar, at least in the US. But this year, the weekend spells danger for Atlantic City. Strikes, if they go ahead, will undoubtedly hurt America's Playground. Picketing workers are not a good look for the casinos, and they'll be hard pressed to make up the staff shortfall – unless they can agree new contracts soon. That age-old ‘us vs them’ tug of war continues.

THIS WEEK IN NUMBERS

20+

Years of experience working with private and public companies for new React Gaming Interim CEO Leigh Hughes



2 August



Launch for Armadillo Studios slot **The Lioness**, featuring Brazilian MMA champion Amanda Nunes

381%

Year-on-year revenue increase for Q1 2022 for Allied Esports Entertainment



2

Year partnership between Dafabet and Premier League club AFC Bournemouth

299

Covid-19 cases recorded in Macau between 25 and 26 June, prompting the Government to order a fresh round of restrictions and testing measures



US ROUND-UP: NFL, PROBLEM GAMBLING COUNCIL, KAMBI & MORE

► New York Governor Kathy Hochul's signature is all that remains to bring into law a bill establishing the **Problem Gambling Advisory Council** (PGAC).

The bill, co-sponsored by State Senator and Chair of the Racing, Gaming and Wagering Committee, Joseph Addabbo Jr, has been approved by the state's legislature.

It seeks to combat gambling addiction and minimise harm. To this end, the bill will create the PGAC; a body responsible for identifying issues that affect those who suffer from problem gambling and recommending prevention strategies, as well as treatment.

Payment system developer **Passport Technology** has announced the launch of a new loyalty and rewards system at the Cahuilla Casino Hotel.

The Lush loyalty platform provides casino operators with the opportunity to increase customer engagement through customisable games, promotions and offers. Operators can tailor a range of branding, multipliers and specifiable promotions via the secure Lush web app.

Passport will also install dedicated kiosks at the Cahuilla, where players can access features including "club enrolment, card reprints, dynamic games and offers."

The NFL has announced a brand new role and appointment to oversee its sports betting business dealings.

David Highhill has been named the new Vice President and General Manager of Sports Betting, in a move designed to fortify the NFL's position within the burgeoning US sports betting industry.

Highhill has worked with the NFL for over 10 years, moving into his new role from his previous position of Vice President of Strategy and Analytics in the corporate strategy group.

Former PokerStars Executive Eric Hollreiser has acquired **the Poker.Org** news website and has launched **Triple Barrel Media**, a media company that aims to bring a new independent voice to poker journalism.

In a statement on the site, Hollreiser noted that the poker industry is currently entering a new surge in global poker interest, with changes on Poker.Org - such as a new brand and logo - representing his mission to speak for the independent voice and passion of poker players.

"Poker.Org is now owned and operated by Triple Barrel Media Limited," said Hollreiser. "I am the Founder and CEO of Triple Barrel Media, and I spent a decade on the executive management team of PokerStars during many of its glory days."

"I created Triple Barrel Media because I believe poker's best days are coming and that a new, independent modern media company can help shape that future and provide an authentic platform for the voice of the more than 100 million poker players worldwide."

Finally, **Kambi** has agreed a contract extension with Greenwood Gaming and Entertainment, which owns and operates BetParx and Parx Casino.

The two groups first signed a multi-year sportsbook agreement in November 2018, and the expansion sees Kambi continue to supply Greenwood Gaming across several US states.

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4th

US state in which Evolution is offering live casino after going live in West Virginia

9

Areas of concern around disordered gambling in the responsible gambling NFTs launched by Entain Foundation US



2050

The year Wynn Resorts aims to be net zero by, as reported in its ESG report for 2021

BGC: BANNING FREE BETS WILL PUSH ALMOST A THIRD OF BETTORS TO BLACK MARKET

The Betting and Gaming Council (BGC) says banning promotions such as free bets would result in almost a third of bettors moving into the black market, as well as removing millions of pounds from horseracing.

Noting new research conducted by YouGov, the BGC said 69% of people want free bets allowed, with 63% saying they found promotions to be a valuable part of betting. Moreover, 28% said they would consider moving into the black market if a ban was introduced. Some anti-gambling campaigners have demanded that the Government introduce a ban on such promotions as part of its review of the Gambling Act 2005.

Other analysis from the BGC found that the ban would hit the horseracing levy for approximately £5m (\$6.1m) per year. "Promotions and offers are part of the customer experience for any vibrant industry, including our intensely competitive sector, which supports 119,000 jobs and brings in £4.4bn in taxes to the Treasury," said BGC Chief Executive Michael Dugher.

"Blanket bans on offers would be anti-punter and would severely degrade that customer experience, punishing the overwhelming majority of punters who bet safely. Problem gambling is 0.2 percent. Imagine the outcry if supermarkets were forced to ban offers and promotions for beer and wine? We see no difference to our industry."

Dugher added: "A draconian ban would damage a sector which tens of thousands rely on for their livelihoods, by turning punters away from the regulated industry into the arms of unsafe, unregulated black market gambling, where the numbers using such sites has doubled in recent years and the amount bet is in the billions."

GI Verdict: As witnessed in previous BGC outcries, Dugher's "draconian" belief is not one he is willing to let go, despite a large proportion of bettors in the UK being in the legal market. That said, he does make a valid point when claiming that other industries would face backlash if they introduced a similar ban. Consumer freedom should remain paramount.

THE WEEK IN QUOTES

"We continue to see great success with our table game content and progressive solutions across the United Kingdom and look forward to replicating that same success for our clients in these new markets. We see great opportunity with this pairing of our best-in-class table game content and solutions with Spirit Gaming's European market expertise."

Galaxy Gaming President and CEO Todd Cravens comments following the supplier's distribution agreement with Germany-based distribution company Spirit Gaming

"After 18 years since the privatisation of the national lottery of Malta in 2004, the lottery will be operated for the first time by a wholly-owned Maltese company, whose mission is to provide the market with a service that is local, innovative and of the highest levels of quality."

National Lottery CCO Franco DeGabriele in Malta discusses choosing EveryMatrix as its new provider

ALLWYN/CAMELOT: UK NATIONAL LOTTERY LICENCE HANDOVER FORMALLY BEGINS

The Gambling Commission has announced it will now begin the process of formally awarding the National Lottery Licence to Allwyn.

Following legal challenges by Camelot, the process was held up in the High Court. However, the Court has, as of 29 June, agreed to lift a suspension on awarding Allwyn the licence, imposed as a result of Camelot's legal action.

Allwyn has released the following statement: "Today's ruling is good news for The National Lottery; it enables the Gambling Commission to move forward to award Allwyn the Fourth National Lottery Licence.

"Mrs Justice O'Farrell was clear that the public interest, and in particular the impact on good causes, was a strong factor in her judgment. Her decision paves the way for the transition to Allwyn, the winner of the Fourth Licence Competition, serving The National Lottery as its operator from February 2024; kickstarting a transformation

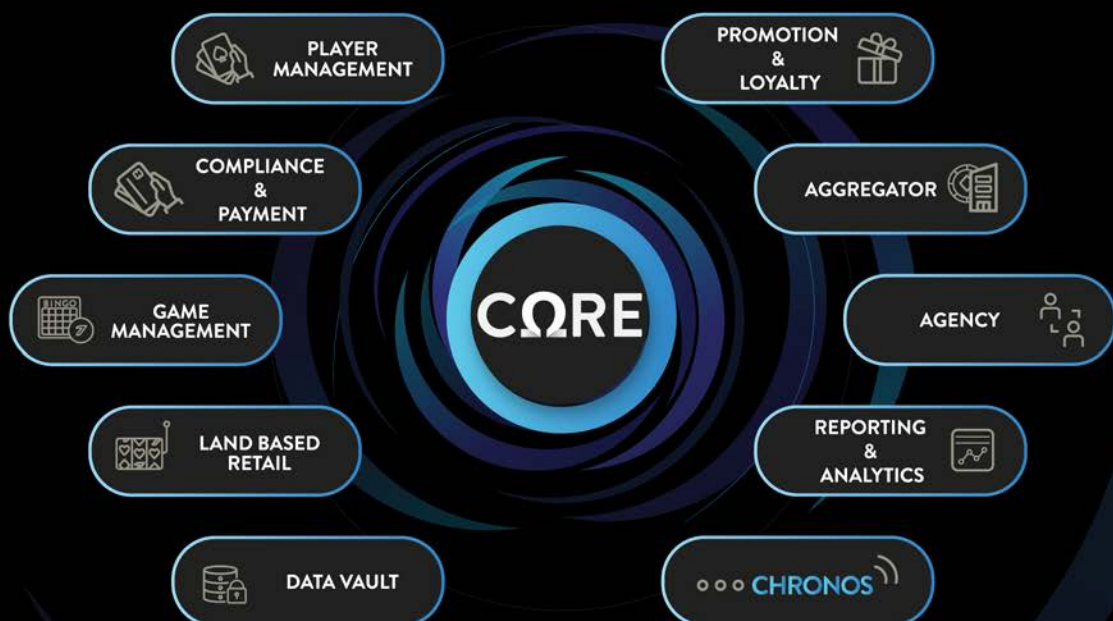
programme that brings an enhanced games portfolio, new technologies, provisions for safer play, and a substantial increase in returns to good causes.

"We look forward to the Gambling Commission moving to Award and to Camelot working constructively with us to ensure a smooth handover for the benefit of players and good causes alike."

The Gambling Commission has also announced plans to prepare for trial, in response to Camelot's legal challenges.

GI Verdict: This is a huge step forward in the process of installing Allwyn as the new National Lottery licence holder. Although the legal challenges posed by Camelot remain, the clouds surrounding Allwyn's appointment as the new licensee have parted. This is made even clearer by the Gambling Commission's confidence that all legal challenges posed by Camelot can be repelled. Nothing is confirmed yet, but this news may prove a significant step in The National Lottery changing hands for the first time since 1994.

THE OMNI-CHANNEL PLATFORM POWERED BY CHALLENGE



"The quality and diverse portfolio of SelvaRey's products matches our luxury of choice positioning, and we're looking forward to welcoming guests with tropical and elevated beverage options, further enhancing the Baha Mar experience."

Baha Mar President Graeme Davis on the resort and casino's new brand partnership that will see it work closely with American singer Bruno Mars

"AGA, our members and the entire gaming industry are committed to stamping out all forms of human trafficking. Through the Anti-Human Trafficking Task Force, we will continue to bring the industry together to defeat this evil and pervasive human rights offence."

American Gaming Association (AGA) President and CEO Bill Miller after the body released the first resource for its newly founded Anti-Human Trafficking Task Force

POKERSTARS OFFICIALLY LAUNCHES IN ONTARIO HOME MARKET

PokerStars' long-awaited homecoming has finally arrived. The Flutter-owned brand is clear to go live in Ontario after being granted full registration to operate in the province by the Alcohol and Gaming Commission of Ontario (AGCO).

While this comes comparatively late, given that Ontario launched regulated iGaming in early April, PokerStars' debut is perhaps more meaningful than most.

The first ever hand of PokerStars was played in Ontario over two decades ago, and the significance of its launch post-regulation was not lost on Tom Warren, the brand's Managing Director of Marketing.

"In many respects, Ontario is our home market, so we are thrilled about the new regulated environment within which our players can play," said Warren.

"A lot has changed in that time, but our commitment to offering our players the most epic and thrilling experience in the market hasn't – and we can't wait to

get started."

The registration allows PokerStars to offer its products to Ontarians, covering poker, casino and sport, while presenting a localised schedule and offering.

GI Verdict: Ontario is widely expected to become one of the largest markets in North America and PokerStars is now a part of its regulated launch, after being granted full registration by the AGCO.

Ontario and AGCO have been praised by *Gambling Insider* contributors for offering a North American region a fast-track to mature regulation. This opinion is by no means universal, though, as others *Gambling Insider* has spoken to claim Ontario's launch is a "damp squib" due to its stringent regulations.

These contrasting views are interesting to note: they essentially agree on the fact Ontario is a highly regulated market already, despite taking a different stance on said regulations. It remains to be seen how revenue will be impacted.

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12%

NEOGAMES ENTERS BRAZILIAN MARKET WITH INTRALOT DO BRASIL PARTNERSHIP

Aspire Global owner NeoGames has secured a multi-year turnkey project agreement with Intralot do Brasil, the lottery operator in Minas Gerais, Brazil's second-largest state.

The agreement will be NeoGames' first venture into the Brazilian market, and the company will provide iLottery and iGaming services to Intralot.

Additionally, NeoGames will provide sports betting services through BtoBet, which was included in the recent Aspire Global acquisition.

NeoGames CEO Moti Malul said: "By delivering our platform, comprehensive player-focused services and market-proven games, as well as leveraging our advanced online sports betting solutions BtoBet, we are beginning to demonstrate one of the key strategic benefits for our recent acquisition of Aspire Global.

"By early next year, we will provide online lottery and sports betting players in Minas Gerais with an exceptional online gaming experience.

"We hope to serve as a strong partner to Intralot do Brasil in helping them achieve continued success in Minas Gerais, while simultaneously supporting our near and long-term objectives in Brazil and throughout Latin America."

The NeoGames NeoSphere platform will be made available to Intralot do Brasil, alongside a range of online games. These games and the sports betting service will be specifically tailored to the Brazilian market.

GI Verdict: NeoGames' entrance into the Brazilian market has undoubtedly strengthened its presence in Latin America. It's more than a hint that the iLottery platform is looking to expand operations across multiple jurisdictions in the region.

The owner of Aspire Global, BtoBet and Pariplay, NeoGames will offer its gaming brands a firmer foot in the LatAm door. This is the most significant move taken by NeoGames since its acquisition was announced on 16 June 2022.



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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CAMELOT RECORDS £283M DROP IN SALES FOR 2021/22

Camelot has raised its second-highest sum ever for good causes despite a £283m (\$347m) drop in ticket sales for the 2021/22 financial year.

Amid an ongoing legal battle over the decision to award Allwyn the Fourth National Lottery licence (see earlier story), Camelot has published its results for the 12 months ended 31 March 2022.

Over £1.9bn, including unclaimed prizes, was generated for good causes, an increase of approximately £24m on last year. However, the operator also recorded a 3% dip in ticket sales, which fell from £8.3bn to £8bn.

The operator primarily attributed this decline to a decrease in sales of National Lottery instants, which were down £240m year-on-year. But draw-based games, while performing better, also saw sales decline, experiencing a £43.2m dip.

Camelot said this fall was largely down to "greater competition for people's attention and spend after the lifting of Covid restrictions," alongside "growing economic uncertainty."



Consumers have tightened their belts to cope with the rising cost of living, impacting Camelot's performance. Scratch card sales remained below pre-pandemic levels, while in-store sales overall fell from £4.9bn to £4.7bn.

GI Verdict: While Camelot's record £1.9bn for good causes paints the operator in a good light, its drop in sales reveals a bigger picture

– Camelot is falling behind the times. As online verticals continue to advance technologically, Camelot is yet to convert from land-based operations with any real success. This is why the Gambling Commission handed the National Lottery licence to Allwyn and, despite a legal challenge to wrestle it back, these latest sales figures suggest the licence is headed to the right owner.

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ORIANA BRANON NAMED ARISTOCRAT VP OF COMMUNICATIONS AND CORPORATE AFFAIRS

Aristocrat Gaming has appointed Oriana Branon as its new Vice President of Communications and Corporate Affairs.

In the newly created position, Branon will oversee all internal and external relations for the Gaming division, and provide strategic guidance on the group's environmental, social, and governance (ESG); as well as sustainability and ethical impact, and diversity, equity and inclusion.

A member of the executive leadership

team, she will report to Aristocrat Gaming CEO Hector Fernandez.

"We are thrilled to welcome Oriana to the Aristocrat Gaming team, where she will support our mission to bring joy to life through the power of play," said Fernandez.

"Oriana's extensive communications background across business and consumer markets, stellar track record of storytelling, and commitment to social impact demonstrate she will be an incredible asset to our company

during a time of rapid growth."

Branon recently led corporate communications for financial tech group Bill.com, driving its external visibility in the wake of its IPO, while she was also the first PR hire for Alaska Airlines in California.

Branon holds a Bachelor of Arts degree in Communications and Sociology from the University of California, Santa Barbara, and sits on several nonprofit boards that are dedicated to opening pathways for underserved communities, as well as having a passion for mentoring women of colour professionals.

GI Verdict: Oriana Branon's appointment is an important and progressive step to drive inclusivity at Aristocrat and the gaming industry at large. It's no secret that the percentage of women in significant positions is far below what it should be in the gaming industry, particularly in the 21st Century. Branon's appointment is a big positive for women in gaming.



YOUR WAY TO THE TOP

RHODE ISLAND MAY REVENUE

Fantini Research partners with *Gambling Insider* to provide regular gaming industry data. This week, we look at figures from Rhode Island.

ALL-SOURCES REVENUE	MAY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Twin River (BALY)	\$50.320	+36.43
Tiverton (BALY)	\$11.369	+3.82
Total	\$61.689	+28.97

TABLE GAMES	MAY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Twin River (BALY)	\$7.229	+22.96
Tiverton (BALY)	\$1.552	-6.54
Total Tables	\$8.781	+16.46

SLOTS	MAY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Twin River (BALY)	\$43.091	+38.99
Tiverton (BALY)	\$9.816	+5.68
Total Slots	\$52.907	+31.31

SPORTS BETTING	MAY REVENUE (M)	CHANGE (%) YEAR-ON-YEAR	OPERATOR
Online	\$1.876	+38.86	IGT / CZR
Tiverton (BALY)	\$0.405	-11.79	CZR
Twin River	\$0.057	-94.13	CZR
Total Revenue	\$2.337	-15.73	N/A

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**GUEST****INTERVIEW****MARTIN DACHSELT,**
*CEO, BAYES ESPORTS***Dachzelt discusses League of Legends and esports data with Gambling Insider****What can you tell us about the new data hub you're providing, along with Riot Games, for League of Legends?**

The basic idea was that we and Riot Games wanted to invest in professionalising the whole esports ecosystem and the League of Legends (LoL) scene. There was always a disparity between the different LoL teams. There are teams with a lot of resources and a lot of money, building their own solutions to access data via different sources. Teams could gather data either manually, such as going through videos of each match and entering data points, or building computer-based solutions.

These top teams could even access internal application interfaces of Riot Games. Other teams did not have this luxury; nor did certain regions. Some regions offered teams data while others did not. Of course, if you look at legitimate competition on a global level, you want all teams, from the small teams to the big teams, to have the same level of access to data. Providing official data for LoL alongside Riot Games will level the playing field.

Our data hub is the first step in our project with Riot Games to provide official data. Our exclusive distribution deal with Riot Games made this possible, as we already stored live data and our first step made this data accessible to them. Riot Games has some special files, which are easy to digest and interpret for data distribution. So, if you don't have dedicated data scientists, this offers solutions that are far more accessible. We wanted to provide this to professional LoL teams, which is why we created the portal, available for the teams and later for the community. The data hub received good feedback

from professional teams, as they didn't have to use "dirty workarounds" anymore to get the data.

Most data hubs cover a variety of games. How do you think this hub will be received given it is just focused on one game, League of Legends?

It's been well received, as League of Legends is one of the biggest games. Also, the underlying technology is written in a way that can be reused for different hubs. Of course, we have in-game data, which is different game-to-game, but the general data format, the umbrella, is the same. We store this data so we can offer a similar service to different partners in the future, different game titles and tournament organisers. However, each partnership is always different. For example, in Counter-Strike: Global Offensive (CS:GO), the situation is different regarding the availability of data.

In CS:GO, there is a replay function, and the replay format is quite well documented. There are already tools you can use to extract the data. So this is a different angle of what we need to offer to create value for tournament players, and those who watch. For Riot Games and LoL, there was no real offering around this. Some regions with internal scrims used replay features internally, in a very informal way. But now that we have the data and experience with replays, we can open this feature in all regions and make it standardised. We are working to use underlying technology for other game types in the future.

You've gone into a single-game data platform with League of Legends first. Do you see yourself doing deals with other Riot Games products and beyond? Or is the League of Legends a bit of an experiment to see how successful data hubs for specific games can be?

If you look at the three big game titles in esports, it's CS:GO, LoL and Dota. Then you have the e-leagues, which are slightly different and include games like FIFA. But if you look at the betting world, the three top titles – CS:GO, LoL and Dota – are still far, far, far ahead of the other titles. Focusing on the number of competitions, the prize money and the total audience, it's difficult to say which of the top three is leading, but I would say CS:GO is maybe leading slightly. It's very fragmented. There are a lot of tournament organisers, and tournaments are very open.

I'd say LoL is a close second, though, behind CS:GO. But then you have a situation where Riot Games (LoL developer) controls the tournaments, outsourcing some tournaments to different

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partners continentally, but still has a strong influence on how the tournament is run. It's a bit like you have in football, with FIFA as the head of the organisation. I'd compare Riot Games to FIFA in terms of them acting as a governing body. I would say LoL is ahead in terms of professionalism, although CS:GO may just edge audience numbers at the moment.

With your new data hubs, do you think this will help create a stronger data-driven betting culture in esports?

I think there is already a lot of data swirling around the esports scene. This just adds official data to LoL, CS:GO and Dota; it was already available to operators and service providers who create the odds. I'm not sure how much more data-driven interest this will cause, we'll have to see. But what makes a successful sports betting market is a good audience for the sport. You need a lot of people who watch it. Maybe this data can help create better matches and drive interest in esports even higher.

For a high level of interest, you need a firm degree of professionalism within the sport. Fans want to see professionals pushing the boundaries of what can be achieved; the same applies to esports and LoL. Fans want to see the next world record, the next championship success, they want to see the creation of a "star image." Creating official data is just one piece in the puzzle on this road to professionalism, as players can be better trained and educated. Adding data adds a layer of coaching, too, it allows playing patterns to be observed, giving guidelines for player improvement. So professionalising something means

more fans, more fans mean more money, more viewers, more bets.

For the betting industry, it means turnover will increase overall. The betting industry is not the fastest, let's say, at latching on to new titles in new industries; operators need to train their models, they need to understand how the new sport or esports works. It helps to have a title that has been around for a long time, such as LoL; it gives another layer of legitimacy, especially over titles that come and go within the space of a year. The betting industry needs sustainability and the big games in esports provide that.

Aside from your deal with Riot, does Bayes Esports have any other plans for the rest of 2022?

We are very active in the data business; we are currently working on creating an odds aggregation platform that we're very excited about. We've had very good feedback on this from service providers who create odds and from operators, sportsbooks, etc. It will be a big announcement.

We are also working on our audio-visual services and solutions, to improve our offer for esports. At the moment, we distribute via our joint-venture partner Sportradar, but we hope to create our own audio-visual offering. In addition, we are working on our own content creation.

Content is king, so we are talking about creating a single source of content by fusing our data stream with audio-visual content. This would mean automatic social media posts, for example, or creating storylines for players, among other things.



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FREE MARKET AT STAKE, NOT JUST FREE BETS

In our inaugural GI Friday debrief last week, we provided a very global outlook. This time, we are changing tact – as some of the biggest developments in the industry came squarely from the UK, the most mature online market in the sector.

Outside of the Allwyn news, reports about the long-awaited Gambling Act review were by far the industry's most significant. Now, as we covered earlier in this newsletter, the Betting & Gaming Council's (BGC) reaction to these reports was unfortunately predictable. Shouting about the black-market threat is a tired, worn-out message, even if the BGC is good at lobbying Westminster here.

Yet the whole gambling sector should be extremely concerned if plans to go ahead with a free bet ban are ever implemented. Without even mentioning potential black-market operators,

forbidding free bets would be an affront to how free markets, in general, work.

Some policies, such as banning betting sponsorship in sport, would be meaningless vote winners. While such bans do not significantly harm the industry, a reduction in sponsorship would equally have zero impact on problem gambling. We at Gambling Insider say this objectively: the industry has a lot of work to do to protect customers – but this can only be done internally, meaning policies to stop or reduce VIP schemes are genuine practical solutions (a tick here for the Government).

Online stake limits, however, and a potential removal of free bets, would be more akin to a Soviet Union tactic. Marketing like this is a basic business method. What if discounts on multi-pack beer were banned? What if buy-one-get-one-free was outlawed for chocolate, crisps or the like?

There would be an outcry about the moral implications if this was any other industry except gambling. And the phrase 'nanny state' – while increasingly overused by gambling lobbyists – is unfortunately becoming all the more apt. If a player is offered a free £5 (\$6) bet, this cannot possibly make them an automatic problem gambler. If an 'evidence-based' review of the Gambling Act has led to that misguided assumption, then we do not have a free market anymore.

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