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WEEK 31

FRIDAY 5 AUG 2022

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**GLOBAL
GAMING
AWARDS**
—2022—

ASIA





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WEEK 31

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AMID MACAU'S MISFORTUNE, WHAT WILL THE FUTURE HOLD?

CAROLYN RENZIN NAMED FANDUEL CLO



SHORTLIST REVEALED



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Macau revenue plummets for July amid lockdown struggles, making economic recovery feel far off. We all know Macau will be back, just like Las Vegas. The question is when?

Macau reports 95% GGR drop for July, worst month since pandemic began

Macau's gross gaming revenue (GGR) is down 84% when compared to June, as the region's Covid-19 restrictions take their toll.

According to data from the Gaming Inspection and Coordination Bureau (DICJ), Macau generated MOP\$398m (US\$49m) for July, the city's worst monthly performance since the pandemic began.

This also represents a 95% year-on-year drop in GGR, falling from MOP\$8.44bn, and continues a general downward trend.

For June, Macau reported MOP\$2.47bn, which constitutes a 62% decrease year-on-year, while May and April saw the city post 68% GGR losses.

So far this year, every month except February has seen Macau post double-digit GGR decreases when compared to 2021.

Much of this can be attributed to Macau's enforcement of China's Zero Covid policy. An outbreak in mid-July saw the city once more plunged into lockdown, with casinos among those properties forced to close.

While this only lasted less than two weeks, with casinos opening on Saturday 23 July, other restrictions remain and their negative financial impact has been enormous.

There is, however, cause for some immediate optimism.

Macau reopens leisure facilities

Reported Covid-19 cases in Macau have dropped to zero for nine consecutive days.

All results from the 14th round of nucleic acid testing (a type of viral diagnostic test that detects the virus) throughout the city were negative. This has led to the reopening of leisure facilities, such as beauty parlours, gyms, dine-in restaurants and other food and beverage establishments.

All the above-mentioned facilities, and many others, opened to the public starting 2 August.

The bounce back?

Although the exact legal details surrounding Macau's post-consolidation phase remain ambiguous, there is a clear sense that the region's governmental bodies are pushing to get operational levels back up to at least what they were before the recent Covid outbreak.

Pre-July, Macau's operations were still hampered by an impairing lack of tourists, owing to stringent travel restrictions prohibiting entry to the region. This included restrictions in the neighbouring Guangdong province and one of Macau's largest customer bases, Hong Kong.

But now, this previous reality might look appealing to a market where casinos can only operate at 50% and a host of businesses remain closed.

There is also somewhat of a disconnection between

Macau's current state and its plans for the future. Not only does it – and its licence holders – plan to reclaim its status as the world's most lucrative gaming region, but as per the terms of Macau's renewed gaming laws, the region wants to expand its services into foreign markets.

"New era" for Macau gaming industry, according to new Commission President

The Macau gaming industry is set to enter a "new era," according to the President of the new Commission for Gaming Licences Tender, André Cheong.

Speaking at a press conference, Cheong outlined the Commission's goal of expanding the Macau gambling sector into foreign markets, a move intended to provide a boost for the industry.

Cheong went on to discuss the previous 2001 Commission, highlighting how different objectives account for the need for different panel members.

He said: "At that time, what was on the line was gaming liberalisation and the focus was on boosting Macau's economic development from the gaming sector, so that this was reflected in the composition of the members of the Commission."

Cheong added: "This time, and after 20 years have passed, we already have a certain scale and so the Government does not want and will not reinforce the infrastructure of the casinos."

"We will not do that. We will pay more attention to the non-gaming elements, as well as support for the small and medium enterprises (SMEs) and expansion into foreign markets."

Dream vs Reality

GI Verdict: Plans for a "new era" in Macau are no pipe dream; they are enshrined in policy. But the reality of the region today feels a million miles away from this proposed upgrade, given Macau has not once stabilised and returned to profitability since the pandemic began in 2020.

But Macau's return to "normal" should be a formality. It's just a question of when. Its current lockdown has pushed the goalposts back somewhat.

Most predictions for a late 2023, early 2024 recovery for the region remain intact, but a lot will depend on China's continued insistence to employ a zero-Covid policy.

Just look at Las Vegas; its operations have recovered dramatically since casinos began operating at 100% capacity post-Covid in May 2021, making over \$1bn in gaming revenue for 16 months in a row.

Macau will quite obviously make its comeback. But how will it look when it does and which operators will be there to enjoy the pent-up demand? Perhaps one final question we need to ask is: Why is Macau still insistent on not regulating online gaming within the region?

THIS WEEK IN NUMBERS

11%

Increase in Q2 revenue for Caesars Entertainment, driven by its Las Vegas business



£1.2m

The amount LeoVegas was fined by the Gambling Commission (\$1.4m)

3,000

Virtual games per day, the amount offered by Sportradar's virtual NBA database, over 12 betting markets



2%

IGT's drop in revenue for Q2 2022 after reporting \$1.02bn in revenue

1 July

The date PSG signed a new deal with online betting platform 1xBet



CAROLYN RENZIN NAMED FANDUEL CHIEF LEGAL OFFICER

► FanDuel has appointed Carolyn Renzin as the operator's new Chief Legal Officer (CLO), in a move that will "significantly expand" Renzin's duties.

At the same time, Renzin will continue in her role as Chief Compliance Officer.

In her new position, Renzin will be responsible for overseeing legal, risk, regulatory engagement, compliance and responsible gaming for FanDuel, with her team working to ensure the company continues to promote customer safety, security and compliance.

Renzin previously worked at JP Morgan Chase & Co, where she served as an Assistant General Counsel, working as a regulatory litigator and in the Office of the General Counsel.

Renzin also has previous experience in compliance consulting with Guidepost Solutions, as well as litigation and regulatory enforcement with law firm Stillman, Friedman and Shechtman.

FanDuel President Christian Genetski said: "Carolyn is a passionate, bright, empathetic, and extremely hard-working leader and colleague."

"In her time at FanDuel, she has led transformative change for our business in building out a regulatory and compliance function befitting the current and future scale of our company, and I'm confident she is the right choice to lead our high-performing legal team going forward."

Genetski was named as FanDuel President in July 2022, while Mike Raffensperger was appointed to the newly created position of Chief Commercial Officer.

The move came as the company looked to support "important leadership

continuity," with each executive having separate and direct reporting routes to CEO Amy Howe.

The company recently launched branded Evolution live dealer studios in Michigan and Pennsylvania, and has also appointed Andrew Sneyd as Executive Vice President of Marketing. Sneyd will steward growth marketing, media and customer engagement.

GI Verdict: Renzin's appointment as CLO is significant for several reasons. First and foremost, an expansion of responsibilities places further trust in a female executive with an important role at what is arguably the biggest operator in North America. As a market leader, this shows that FanDuel is taking its diversity and inclusion role seriously. Renzin joins other women in high-profile roles at FanDuel, including CEO Amy Howe and Chief Product Officer Sarah Butterfass.

Furthermore, Renzin's appointment points to a wider restructuring of FanDuel's leadership team, following the appointments of both Genetski as President and Raffensperger as CCO. It could be that the operator is planning to become self-sustaining, if it ever breaks away from its parent Flutter. This is an option Howe did not rule out in her CEO Special interview with *Gambling Insider* earlier this year.

The loss of Flutter would pose risks, though, as FanDuel would be losing core resources. Its success as the dominant brand in the US suggests, financially, the move to independence is both achievable and sustainable. But it still has a huge parent firm in Flutter – and one that ultimately may not want to lose FanDuel anyway.

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20,000

Dutch gamblers have used the Netherlands' self-exclusion register since it launched last October

\$1.3bn

The amount won by an Illinois player on the Mega Millions lottery



300 million



The amount of AC Milan fans in Asia – as estimated by AC Milan after it announced its partnership with M88 Mansion

GLOBAL GAMING AWARDS ASIA 2022: FULL SHORTLIST REVEALED

Gambling Insider is pleased to announce that the full Shortlist for the Global Gaming Awards Asia 2022 is now available to read.

Following the success of the Global Gaming Awards events in Las Vegas and London, *Gambling Insider* is beyond excited for the inaugural Global Gaming Awards Asia event this month.

"As you will see in the Shortlist, Covid-19 did not stop suppliers across APAC from developing new products or improving existing products," said Julian Perry, Editor-in-Chief of *Gambling Insider*.

"Meanwhile, a lot of operators announced major renovation or expansion plans. It's also fascinating to see how much certain markets, such as Singapore and the Philippines, have grown."

Companies and individuals are always shortlisted for the Global Gaming Awards based on merit, and winners are chosen by C-level industry executives. This year's Judging Panel features over 20 senior executives from the Asia-Pacific region, such as Ken Jolly, SVP and Managing Director, Asia at Light & Wonder, Vicky Chan, Assistant General Manager at Asia

Pioneer Entertainment Holdings, Akiko Takahashi, EVP & Chief of Staff at Melco Resorts & Entertainment, Dallas Orchard, COO, Asia Pacific at IGT, Jason Barry, SVP-Table Games at Galaxy Entertainment Group, and more.

KPMG in the Crown Dependencies will once again independently adjudicate the voting process to ensure full transparency and fairness.

The winners will be announced at a virtual ceremony on 22 August at 5pm Singapore/Macau/Philippines time (10am BST). The event will be streamed on globalgamingawards.com/asia and on *Gambling Insider's* LinkedIn page.

BetConstruct is the Lead Partner of this year's Global Gaming Awards Asia. Other event sponsors include Digitain, SA Gaming and SimplePlay.

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FOR THE FULL SHORTLIST
GLOBAL GAMING AWARDS ASIA 2022



THE WEEK IN QUOTES

"Our anticipated opening dates have slipped a few weeks, reflecting supply issues and normal construction challenges."

Lewis Fanger, Full House Resorts' Chief Financial Officer, after Full House posted a 6% fall in revenue

"It's a notable return to favour for gambling after its share of sponsorships nearly halved from 2019 to 2021. However, this year, deals in rugby and cricket have resulted in a mini comeback which will surprise many as publicity on gambling sponsorship centres on football. So, the big questions are: will the Premier League voluntary ban happen and, if so, will other divisions or sports such as rugby and cricket follow suit?"

Alex Burmaster, Head of Research and Analysis at Caytoo, on a rise in front-of-shirt gambling sponsorships

HIPPODROME LEGEND JAMES THOMAS DIES AGED 88

Gaming industry icon James 'Jimmy' Thomas passed away this week, aged 88.

The President and Co-Founder of London's Hippodrome Casino died in his sleep on Saturday morning following a short illness.

Born in Loughborough in 1934, Thomas came from a family lineage ingrained in Britain's leisure and gaming sectors.

The industry pioneer opened his first casino at the Hurst Hotel in Quorn in 1956, and less than a decade later, Thomas launched the La Ronde Casino & Cabaret Club in his hometown – a venue that played host to some of the most famous entertainers of the 1960s and 70s.

But the entrepreneur's most well – known venture wouldn't come until almost half a century later – as, in 2012, alongside his son Simon, Thomas opened the Hippodrome Casino in London's Leicester Square.

The landmark building has stood for 122 years, and through Thomas'

investment, continues to live on as an iconic part of West London.

For his work, Thomas was honoured by the Casino Association with a Lifetime Achievement Award in 2013 and became the first living person to be honoured on the BACTA Wall of Fame.

He's survived by his sons, Simon and Jordan, daughters Lisa and Carla, as well as seven grandchildren.

Thomas' eldest son, Simon, Executive Chairman of the Hippodrome, said: "My father achieved enough for several lifetimes and was respected the world over for his business leadership and pioneering vision.

"I had the privilege of his advice and guidance not only as a business partner but as a son. He was one of a kind, and will be greatly missed by his family, many friends and staff members."

Jimmy Thomas will also be sorely missed by all of us at *Gambling Insider* and we send our condolences to everyone at the Hippodrome.



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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ABOUT US

SCCG Management is a consultancy that specializes in sports betting, iGaming, sports marketing, affiliate marketing, technology, intellectual property protection, product commercialization, esports, capital formation, M&A, joint ventures, casino management, and governmental and legal affairs for the casino and iGaming industry.



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"His electric performances will pair perfectly with our immersive atmosphere, bringing our guests an unmatched show unlike anything else they can find in Las Vegas. We can't wait to kick off his residency and continue to amplify our talent line-up"

**Zouk Group CEO Andrew Li on
Travis Scott's Zouk Nightclub
Las Vegas residency**

"Problem gambling can affect any individual from any walk of life, but several academic studies have reached the same finding that athletes are up to four times more likely to suffer its consequences"

**John Millington, Senior Director at
Epic Risk Management, on Epic Risk
Management and GIS' partnership to
study gambling addiction**

FOOTBALL CAME HOME, BRINGING WOMEN'S FOOTBALL BETTING WITH IT

After Chloe Kelly's extra time winner, England ended 56 years of footballing pain by claiming victory over Germany in the Euro 2022 final last Sunday, it was more than the players and fans who were celebrating (although the England win cost operators a fair bit!).

According to Flutter Entertainment, the final saw a betting rise that made it the biggest female sporting event in history, in gambling terms.

Paddy Power noted a 26% increase in volume when compared to the 2019 FIFA Women's World Cup Final, while Sky Betting and Gaming saw a 17% rise – with over 900,000 wagers placed before kick-off.

Of course, England were the heavy favourites going into the event, with Paddy Power revealing over 74% of the bets placed were backing the home side at Wembley. Betfair followed suit, reporting 67% were in favour of England to win.

While Sky Betting saw the biggest

support for the Lionesses, reporting 76% of wagers made backed them to triumph.

GI Verdict: The 87,000 people in attendance at Wembley told the story before any stats needed to paint a deeper picture: this match mattered. This whole tournament mattered. There were no empty seats at the home of football, the England fans were ready to see 56 years of hurt come to a satisfying end, against the old enemy, Germany, no less.

As soon as the betting statistics were announced by gambling companies, it only served to underline what we already knew. Women's football has reached a new plane – and for bookmakers, this is a breath of fresh air.

Going forward, the interest in women's football will see a focus on the sport not seen before – which translates to more wagers on matches for betting companies.

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6%

MGM China
4.10 HKD



7%

Galaxy Entertainment
46.95 HKD



1%

Sands China
18.24 HKD



3%

MACAU COVID RESTRICTIONS HIT SJM HOLDINGS' BOTTOM LINE

SJM Holdings has reported heavy losses in its H1 results, which it attributes to the lockdowns and Covid-related struggles Macau has suffered in the past year.

The first 6 months of 2022 proved brutal for the Hong Kong-based casino giant, as it reported a 21% drop in revenue, totalling HK\$4.13bn (\$525.9m). While net gaming income also took a hit, falling 25% annually.

However, it's the adjusted EBITDA which best underlines the losses accrued over the course of H1, as it made HK\$1.17bn (\$149m), a sum representing a 133% drop on 2021.

After reporting the losses, SJM Vice Chairman and CEO Dr Ambrose So stated: "Working hand in hand with the community, we are doing our utmost to support the Macau Government's efforts to fight Covid-19 while at the same time remaining loyal to our dedicated staff. We look forward to successful participation

in the tender for new Macau gaming concessions later this year and to our continued presence in Macau for many years to come."

GI Verdict: The lockdowns imposed upon Macau have devastated the Chinese gambling hub and show why SJM has made such significant losses during the first 6 months of 2022. Of course, SJM will be hoping those losses are not compounded by further financial pain when it announces its H2 results at the end of the year – at which point more serious decisions about the state of Macau's gambling industry will be asked, should gains not be made.

The truth of the matter remains that China needs to adopt a different approach to Covid, as the gambling industry will continue to suffer the wrath of lockdowns should it continue as it has into the near future. A policy which could leave Macau falling behind other casino markets for now.



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RELAX, WE GOT THIS... RELAX GAMING AND BET365 AGREE NEW DEAL

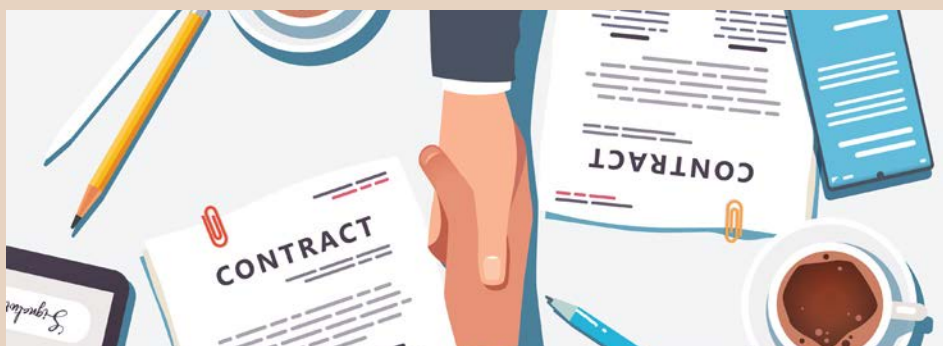
This week, Relax Gaming and bet365 reached a deal that will see Relax supply its gaming content to bet365 and its customer base.

The move is expected to see Relax Gaming – which has such titles as Snake Arena and Monkey Train 2 – have a larger impact in key jurisdictions, as the sheer size of bet365's global reach will give Relax more of a market footprint.

Nadiya Attard, Relax Gaming's chief commercial officer, made note of the significance of the deal for the iGaming supplier, saying: "Naturally, bet365 needs no introduction. As the biggest operator in our sector, taking our products live with them is a hugely important moment for us as we continue to expand at pace."

However, this recent deal isn't the first Relax has made with a major operator, as it signed an agreement with Entain last June, which will allow access to the Spanish market.

That said, Relax's deal with bet365 is much larger in scope, and will cover multiple international markets. A fact



Attard was keen to emphasise, while outlining bet365's strengths: "The operator has a famously in-depth understanding of its player-base and consistently has an impact on the market through innovation and a high-quality offering."

She continued: "As a result, we're delighted the brand has chosen Relax to enrich its offering even further. I'm sure the addition of our premium portfolio will only benefit that reputation further as bet365 continues to grow and

differentiate itself."

GI Verdict: Relax Gaming will be very happy with this agreement, as bet365 will almost certainly see it enjoy widespread exposure.

And, what's more impressive is that it appears to have done so soon after appointing Simon Hammon as its new CEO, which became official in July of this year. So, even with such change being undertaken on the inside, Relax is taking strides to ensure the growth of its brand in multiple markets.



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MASSACHUSETTS FINALLY WELCOMES GAMBLING, BUT WITH AN INTENSE STARE

After years of attempts, promises and outright frustration, the state of Massachusetts – at the last minute – agreed a new bill which will open up the state's gambling laws and allow the public to place bets on sporting events for the first time.

The new legislation, which will be signed into state law shortly by Governor Charlie Baker, who has backed the legalisation of gambling within the state, stipulates that gambling will be legal on all professional sport.

While an agreement on collegiate sport was also reached – despite vast differences on both sides – meaning gambling on college events in Massachusetts will be illegal, unless the college team is competing in a national tournament.

Furthermore, the bill introduces a 20% tax rate for online sports gambling and a 15% rate on all retail market wagers, while not allowing any betting transactions to be made by credit card.



After the agreement was reached in Massachusetts, Speaker Ron Mariano tweeted: "I am proud to announce that the Sports Betting Conference Committee has reached an agreement on legislation that will legalise wagering on professional and collegiate sports in Massachusetts, bringing the immense economic benefits of a legal sports

betting industry to MA."

GI Verdict: The opening up of Massachusetts to gambling will see it join the 30+ other states, as well as Washington DC, in creating a new revenue market for those who wish to bet on sporting events.

Typically a democratic stronghold, the debate over whether or not Massachusetts should legalise gambling has raged since the Supreme Court struck down the Professional and Amateur Sport Protection Act in 2018 – but has found strong public backing from Massachusettsans.

With the famed adoration for various sporting outfits in Massachusetts – including The Red Sox, The New England Patriots, The Boston Bruins and The Boston Celtics – the legalisation of sports wagering appears to be a lucrative move by the state House and Senate in the long run. But it has opted to carefully manage the industry with strict regulations.

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REVENUE REPORTS: NH, RI

Fantini Research partners with *Gambling Insider* to provide weekly gaming industry data. This week, we look at sports betting revenue from New Hampshire and revenue from all sources for Rhode Island.

NEW HAMPSHIRE: JUNE

SPORTS BETTING REVENUE	JUNE REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Mobile	\$3.911	+53.18
Retail	\$0.908	+31.03
Total Revenue	\$4.819	+24.53
Total Handle	\$53.568	+36.42

RHODE ISLAND: JUNE REVENUE

ALL-SOURCES REVENUE	JUNE REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Twin River (BALY)	\$39.400	+15.19
Tiverton (BALY)	\$10.878	+4.91
Total	\$50.278	+12.80

SLOTS	JUNE REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Twin River	\$32.709	+16.92
Tiverton	\$9.525	+9.11
Total Slots	\$42.235	+15.06



TABLE GAMES	JUNE REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Twin River	\$6.690	+7.42
Tiverton	\$1.353	-17.43
Total Table Games	\$8.044	+2.24

SPORTS BETTING	JUNE REVENUE (M)	CHANGE (%) YEAR-ON-YEAR	OPERATORS
Online	\$1.734	+1.26	IGT / CZR
Tiverton	\$0.279	-38.07	CZR
Twin River	\$0.340	-77.37	CZR
Total Revenue	\$2.353	-35.82	
Total Handle	\$34.230	+16.16	

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INTERVIEW

TODD MYERS,
FOUNDER & CEO, GOZONE WIFI

Myers speaks with Gambling Insider about data marketing, trying to improve casino flow, affordability and data privacy...

How many casinos has your system been implemented in currently?

Right now, we've got about seven casinos that are using our platform. But the beautiful thing about our system is we're not actually hardware based; we don't have a physical component, our software integrates with most enterprise-grade Wi-Fi that already exists. That's why these casinos love our product, because they can just add us in to existing infrastructure and they don't need to buy anything new. Immediately they have access to a plethora of data they never had access to before.

How long does the software take to install?

Everything can be done remotely. We've got set-up guys, so we work with the casino's IT team to integrate the right platform and, in general, product set up usually takes less than a day. We integrate natively and partner with most of the large hardware companies.

This isn't new software by any means, it's just software that's been used in different verticals. Now, we're really shifting our message into the gaming space because there's a lot of opportunity for gaming to take the data and utilise player returns.

How significant is the added revenue for the customer?

It's huge; there are several different practical applications for our platforms and one of them is footfall. The practical application of that is to be able to tell the slot manager which areas are performing better than others. It's constantly measuring 24/7, so they may have staff members that are looking at slot flow and point flow at certain days or certain times that staff is available – but this is a real snapshot 24/7 that can tell where busy spots are or where not busy spots are. From a revenue perspective that makes a huge difference because they can place the proper games in certain areas.

How does your platform drive player loyalty?

One of the platforms collects data, and the data that it collects is personally identifiable information – obviously we have the tools to comply with GDPR and all the privacy laws – and most people don't have an issue with entering information. So, with the data released to us, our platform can input data automatically on that person, such as birthday, gender, etc.

From what we've seen, 40% of the people that are in a casino are carded, 60% are not, so the marketing dollar is primarily going to carded members and loyalty customers – and that's where the existing data is.

Our idea is to ask how do you get the other 60%, how do you convert them to become carded? Well, when you walk into a casino generally your cell phone dies, it gets poor signal – especially here in the US, where we have a lot of Indian Reservations that have the casinos on them, and a lack of towers is a big issue.

What we found is people generally access Wi-Fi when they arrive if they want to stay connected. To gain access, they enter a lot of information – at which point, we can customise some campaigns that go to them by email or text message, promoting things within the property as well as the loyalty carded programme.

From that, we've seen a huge uptick of non-carded players converting into loyal players because the campaigns we've created are being driven through our system. They're real-time, they're relevant, they're in the property – it's not like

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sometimes you type in your email address and six weeks later you get an email from the property. This is an email talking to you right now, perhaps giving you a coupon, casino dollars – that's the difference with our platform, it's current, it's personalised – but, at the same time, it complies with all the privacy settings.

On that point, what do you do with the data, because in this post-Snowden world people really care about where it's going?

We don't even share it internally with ourselves, it's only accessible by the facility – and with that said, it will generally integrate with an existing loyalty system or an existing CRM.

“Generally, IT departments are always shrinking, due to costs, so this gives that IT department the opportunity to either expand or refresh equipment because it's always changing”

So, you as GoZone don't touch the data?

Well, we store it, but we don't touch it, there's no humans that see it.

Are there any plans to expand to further casinos?

There are, we're working with several different properties in the US – and also now, because we're getting some visibility in the US, we're hearing from other countries that are interested in sharing their data. That's the beauty of the system, it can be used globally – not just North America – it's cloud-based and can be implemented anywhere.

Where would you like to make sure you have a presence?

Well, we want to maintain a presence in Nevada; we already have a presence there and a couple of casinos are using our system, as well as California. So, primarily North America, but now we're hearing more internationally. We just started talking to a casino in Macau. As they come out of the Covid lockdowns, it's an opportune time to activate this because it's very quick and easy to activate the service. I think that's where the facilities, pre-pandemic, only knew how to communicate with carded players.

But what about the non-carded players, are you open or not open? This is an opportunity for those casino facilities

to get an understanding of everybody that comes into the property, whether they're loyalty players or not – this way they have a new way to talk to those players.

Are you ahead of your competitors in the field?

We don't see many competitors in this space specifically related to Wi-Fi. There are all kinds of channels to collect information on players; we are just another one more of those channels that's a part of the marketing pie. But we have immediate relevance to the players, we can immediately communicate with the people; however, we don't see a lot of competition in this space.

How long have you been going now; when did this concept become real?

We're an eight-year-old company and this data has been readily available for verticals in different industries, all we're doing is adapting it to the gaming industry. Primarily, it's been used for years to capture information in restaurants, hotels, airports, places like that. So it's adapting existing technology into a different vertical and focusing on that, that's really what we're trying to accomplish here.

We're doing well because of the relevant data and marketing as a huge budget line item for these gaming and casino properties. One of the big things our platform has done is that marketing departments see so much value in the data we're able to provide that they're willing to open up their budgets and drive an IT infrastructure.

Generally, IT departments are always shrinking, due to costs, so this gives that IT department the opportunity to either expand or refresh equipment because it's always changing. A lot of IT departments want to switch to the new technology, but they don't have the budget – if we can give a reason for the marketing department to open up their budget and help drive the IT refresh, then really what we're seeing is our platform acting as a bridge to those budgets: IT vs Marketing.

If more and more people adopt your system, will it become more affordable?

That's right and it makes it much easier for the user, while adding a layer of security for that user as well. Some of the things we do generally promote device isolations, ensuring your handset or telephone can't be seen by any other devices on that network.

With security being so essential, has that been a problem for you or has it worked well from day one?

It's worked pretty well from day one. We've actually had to work with the hardware companies to have them perfect some things on their side, because it's more to do with the physical hardware functionality and how devices talk to the different access points. But we have helped facilitate that to be able to adopt more secure standards.



GROWING CHANGE, CHANGING GROWTH

Over the last few years, scarcely have there been many *GI Fridays* that have not covered some type of industry shift, be it regulatory or M&A. In that time, we have inevitably seen change – an inordinate amount during Covid-19 lockdown months – but even more inevitably, growth.

Since the overturning of PASPA in May 2018, we have brought you news of multiple states legalising sports betting on what seems like a weekly basis. In the coming years, we will no doubt bring you more of the same, as regulated sports wagering slowly becomes part of the daily fabric of US sport.

Due primarily to the effects of Covid-19, we have also seen Las Vegas' return to its throne as the globe's premier gaming hub. Macau, as this issue of *GI Friday* has the unfortunate pleasure of detailing, is seriously struggling due to closures

and pandemic-enforced restrictions.

We all know this will change: just like with Las Vegas, once Macau's casinos fully open for business again, revenue figures will absolutely fly. As we have also detailed, though, right now it is very much a question of when.

Naturally, however, these are land-based problems. And the most noticeable trend of growth over the past four years has been that of the online gaming industry. Sports betting has become more and more digitalised but this has been even further expedited when it comes to casino and online slots. Here, we've seen the amalgamation of operators and suppliers, the rise of aggregators and the proliferation of game design studios.

A lot has happened, a lot has changed – despite gambling's core offering ultimately remaining very similar. One thing that has definitively changed is the skyline of the industry, with Evolution and Aristocrat being two big movers during this golden age of global gaming.

On the operator side, meanwhile, Flutter Entertainment and Entain form huge chunks of the industry today. Perhaps the biggest measure of change over this time? Following major rebrands and serial M&A, neither of those names even existed four years ago.

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