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FRIDAY 4 FEB 2022

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ONTARIO SETS APRIL LAUNCH DATE FOR REGULATED IGAMING MARKET

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WEEK 05

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THIS WEEK

- **New York: Caesars dominant early on**
 - **Perth regulator admits mistakes**
- **Accepted: Gambling.com acquires affiliate**
- **Rejected: Aristocrat-Playtech deal collapses**
 - **Macau casinos struggle in January**

GUEST INTERVIEW:

- **Ivan Kravchuk, CEO, Evoplay**

ONTARIO SETS APRIL LAUNCH DATE FOR REGULATED IGAMING MARKET ▼

See also page 3

Round-up, round-up:
Elsewhere in US gaming ▼



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Licensed operators will be permitted to bring their online gambling products to Ontarians this spring, after a long wait...

▶ Ontario's new iGaming market will go live on 4 April 2022, bringing regulated online gambling to residents of Canada's most populous province.

The North American territory will become the latest to launch regulated online gambling this spring when licensed companies may begin conducting iGaming operations. However, there are a few hurdles to clear first.

Private operators must have registered with the Alcohol and Gaming Commission of Ontario (AGCO), and have executed an operating agreement with its online gambling-focused subsidiary, iGaming Ontario (iGO).

Martha Otton, iGO Executive Director, provided some insight regarding the standards operators must meet.

"Consumers can be assured that companies who successfully enter the new Ontario market will have met rigorous standards of game and operator integrity, fairness, player protections and social responsibility, allowing all players to play with confidence.

"Prevention of underage access, ensuring compliance with applicable laws including anti-money laundering rules and regulations, and measures to enable more responsible gambling are just a few of the assurances consumers can expect in the new market as of 4 April."

To date, Ontarians wanting to gamble online have been forced to play with unlicensed, external operators; but as of April, this will no longer be the case.

Otton added: "Today, most internet gaming by Ontarians takes place on websites not conducted and managed by the province.

"Our new internet gaming market will give consumers enhanced entertainment choice, support the growth of a new, legal market and generate revenue that can help fund programs and services that benefit all of us."

News of the market's launch was welcomed by several operators, including Penn National Gaming and Canada's own Rivalry Corp.

TheScore, a Penn National subsidiary, has purportedly begun work ahead of the April launch date, when it plans to take its wagering platform, theScore Bet, live in Ontario.

While the sports betting brand must still satisfy all regulatory requirements, and enter a commercial agreement with iGO, Penn National President and CEO Jay Snowden was optimistic.

He said: "As Canada's preeminent digital sports media brand, theScore is uniquely positioned to capitalise on the introduction of the open and regulated internet gaming market in Ontario, its home territory.

"Launching theScore Bet in Ontario will mark an exciting expansion of our online gaming business into a major new market where we already have an established mobile sports

media product in theScore app and a wide base of loyal users."

Likewise, Rivalry Corp's Co-founder and CEO Steven Salz expressed his enthusiasm for the launch.

Headquartered in Toronto, the sports betting and media company is native to Ontario, and has already submitted an application to the AGCO.

"We are very excited to learn that Ontario residents will have access to safe, regulated internet gaming on 4 April," said Salz.

"We support this decision and believe it is the best way forward for the province. Rivalry has been involved in the Ontario licensing process since it was first announced, and we look forward to launching services in our home market."

Fellow Canadian operator, NorthStar Gaming, also welcomed the Government of Ontario's decision, claiming the province will be able to build a progressive and modern regulatory framework that will provide citizens access to safe online gaming platforms.

Last year, NorthStar Gaming had announced plans to launch a made-in-Ontario online betting brand and sportsbook.

Following on from this, the company agreed an arrangement with Torstar Corporation that will allow NorthStar to use data-led media solutions, news, sports sites and social properties to provide customers with an online casino and sports betting experience.

NorthStar Gaming's CEO and Founding Partner Michael Moskowitz commented: "Today's announcement from the Province of Ontario is a historic milestone as it gives Ontarians more choice and flexibility for online wagering and gaming, something gaming enthusiasts have been requesting for many years.

"In the coming months, we're excited to launch a made-in-Ontario online betting brand and sportsbook for Ontarians to experience and enjoy.

"With the approval of iGaming licences, we can provide our customers with high-quality content and betting options on a safe and secure platform."

And these companies are justifiably excited. In November 2021, affiliate BonusFinder predicted that Ontario, post-regulation, will become the most attractive iGaming market in North America.

GI Verdict: New iGaming markets are always a welcome development, but Ontario's will be especially well received. With more than 10 million eligible customers residing in the Canadian province, operators and suppliers alike will not want to miss out on this opportunity. However, new markets mean regulation and regulation means more for operators to consider. While Ontario's iGaming market will undoubtedly benefit their bottom lines, it remains to be seen what approach the AGCO and, in particular, iGO have in mind.

THIS WEEK IN NUMBERS

21%

Year-on-year decline in Macau GGR for January



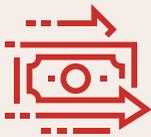
\$66.6m



Expected full-year 2021 revenue for XLMedia

£1m (\$1.4m)

Invested by Betting and Gaming Council members in the 'Single Customer View' trial



25

Year agreement between Rush Street Interactive and Mexican media organisation Grupo Multimedios

2.9%

Unemployment rate for Macau for 2021, its highest total since 2009



ROUND-UP, ROUND-UP: ELSEWHERE IN US GAMING

▶ A bill that aims to permanently prohibit **smoking** in **Atlantic City** casinos received more bipartisan support. The long-awaited measure would remove casinos' exemption from the state's Smoke-Free Air Act, and it has inched one step closer to becoming a reality after Republican State Senator Michael Testa voiced his support for the bill. "Casino workers should have the same right to work in a safe and healthy environment as any other worker in our state," said Testa.

There is a new face at the **San Manuel Band of Mission Indians**, after the tribe announced the appointment of **Steve Burns** as **Chief Public Policy Officer**. Burns will be responsible for "leading and implementing the tribe's public policy strategy on federal and state legislation," as well as other lobbying duties. Burns joined from Mercury Public Affairs (now Actum), where he mainly oversaw crisis management. A distinguished legal career previously saw Burns work at Burson Cohn & Wolfe and the Chevron Corporation. The executive's new office will be based in Sacramento, California.

The **Fontainebleau Las Vegas** resort, finally due to make its long-awaited opening in 2023, has named **Cliff Atkinson** its **President**. Atkinson, an experienced executive in the hotel industry, stepped into his new role immediately after spending three decades managing resorts in New York, San Francisco and Las Vegas. Most recently, he was President and COO at Luxor Hotel & Casino. His role as Fontainebleau President will initially involve creating a workforce to support the opening of the resort.

BetMGM and the **Washington Nationals** opened the first retail sportsbook to be connected with a Major League Baseball (MLB) stadium. The BetMGM Sportsbook at Nationals Park is an entertainment destination for fans, providing a space to both watch and wager on games. The new

sportsbook features 40 large-screen TVs with live odds boards to update on progression. There are six cashier-run betting windows, as well as betting kiosks where wagers can be placed.

FanDuel Group announced plans to open a "state-of-the-art sportsbook lounge" at **Chicago's United Center**. The iconic venue, located in the Windy City's Near West Side, has partnered with FanDuel to launch an in-arena sportsbook. Pending approval from the Illinois Gaming Board, the Flutter-owned brand will bring its retail sports betting experience to the home of the Chicago Bulls and Blackhawks. The proposed sportsbook will be a two-storey venue adjacent to the United Center atrium, and will purportedly be "unlike any sportsbook in North America."

Luxor Hotel & Casino in Las Vegas has travellers talking – and posting. According to **Tripadvisor**, the Strip property is its most-reviewed accommodation ever with more than 48,000 reviews. TripAdvisor, which bills itself as the world's largest travel guidance platform, encourages travellers to review any number of leisure and activity-related brands, landmarks, destinations and restaurants. The company reached half a billion reviews in 2017, 17 years after it launched. Its latest milestone, reaching one billion reviews, comes just five years later.

Academy Award, Golden Globe and 12-time Grammy Award-winning superstar **Lady Gaga** said she will return to **Dolby Live at Park MGM** in Las Vegas this spring. Presented in partnership by MGM Resorts International and Live Nation, she will perform her "Lady Gaga Jazz & Piano" show over nine dates beginning Thursday 14 April. The parties said the shows will celebrate her love of the Great American Songbook, in addition to her collaborative album with Tony Bennett, Love For Sale.

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New ordinary shares issued by Better Collective in January

15 May



The deadline for companies to submit their self-nominations for the Global Gaming Awards Las Vegas 2022, with the self-nomination window opening this week

\$138.6m



Q2 FY22 turnover for BlueBet Holdings, a record for the company

CAESARS DOMINATING MOBILE SPORTS BETTING MARKET SHARE IN NEW YORK

Caesars Interactive is leading the online sports betting market in New York, with 41% handle share and 46% revenue share following the third week of operations for 2022.

FanDuel follows with 31% handle and 26% revenue, while DraftKings is third with 23% handle and 24% revenue.

BetMGM followed with a very low 3% revenue and also 3% handle, while BetRivers saw 1% revenue and 2% handle. Week three of operations included the launch of Entain and MGM Resorts' BetMGM.

For the first three weeks, the market generated \$91.4m in revenue from handle of \$1.17bn. The overall market produced \$43.2m in revenue from handle of \$527.5m for the third week, showing a 24% revenue growth and 34% increase in handle week-over-week.

Caesars generated \$41.7m in revenue from \$487.4m in handle for the first three weeks of 2022. FanDuel produced \$24.2m in revenue from \$360m in handle; DraftKings saw \$265.5m in handle, which generated \$21.8m in revenue.

Meanwhile, BetMGM saw \$2.5m revenue from \$40.6m in handle and BetRivers produced \$1.3m from \$22.2m.

Caesars might just be leading the way because of its heavy marketing. In particular, actor JB Smoove may have resonated with audiences.

GI Verdict: With big launches, and the launch of mobile sports betting in New York is as big as they've come for a while, it's not so much what you're selling, but rather how you sell it. Over \$1bn was wagered across the first three weeks and it's estimated that 90% of bettors were new to online sports betting, so why did Caesars take a 46% revenue share? Quite simply, it's because the company promoted the hell out of it, from giving away NBA jerseys for those who bet \$100 on basketball, to matching customers' deposits of up to \$1,500, to flaunting high-profile individuals like Smoove all over its branding. As they say, you only have one chance at first impressions, and it'll take a lot for the likes of BetMGM and BetRivers to claw back market share.

THE WEEK IN QUOTES

"There were hundreds of people taking part in these lotteries, but it was important to identify those who were organising and moderating them illegally. Working alongside our colleagues at Facebook and the police, we are pleased that key individuals have been identified and this type of activity, which only increases the risk of gambling harm, has been disrupted."

Helen Venn, Gambling Commission Executive Director, on the shutting down of illegal lotteries on Facebook

"We are thrilled to launch our cryptocurrency offering that puts us at the forefront of international payment solutions. With this offering we want to serve younger users who are more inclined to trade cryptocurrencies as they are digital natives. AstroPay has been operating with cryptocurrencies for over two years and we decided that now is the right time to offer our users the option to trade these digital assets."

Astropay CEO Mikael Lijtenstein on the supplier's decision to provide customers with the option to buy and sell using cryptocurrency

CROWN PERTH REGULATOR ACKNOWLEDGES MANAGEMENT FLAW

Conflicts of interest while overseeing the Crown Perth operations were poorly managed, Western Australia's (WA) gaming department admits – albeit after the event...

Currently, a royal commission is trying to determine if lax government oversight had any contribution to money laundering and problem gambling issues at the Perth casino.

WA's investigation revealed the Gaming and Wagering Commission (GWC) had decided not to look into several allegations of money laundering against Crown because the company's former legal boss had claimed "it was a media beat-up".

GWC is a part-time, seven-member board that meets once a month and is provided assistance by the Department of Local Government, Sport and Cultural Industries (DLGSCI).

There was evidence that the state's former Chief Casino Officer would have shared regular fishing trips with two Crown employees.

Counsel representing the DLGSCI, Fiona

Seaward, outlined an overhaul of GWC and department processes, including requirements to disclose personal relationships with Crown staff and to register gifts, benefits and hospitality.

She added that the department is investigating its code of conduct, and awaits integrity presentations from the state's corruption watchdog and public sector commission.

The royal commission will also find out if Crown was allowed to self-regulate aspects of its Perth operations, with WA's knowledge and approval.

In the coming days, the inquiry will hear a closing submission from lawyers representing Crown, as well as the company's major shareholder James Packer.

GI Verdict: The latest saga involving Crown certainly didn't need any more twists or turns, but that was perhaps inevitable given the scale of the scandal.

Yet perhaps nobody expected the next mistake to be that of the regulator. And it may be a long wait until the department carries out its investigation fully.



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“STG is not only a leader in its industry but also an attractive employer that attracts top talent. The fact Jarek Walaszek joins the group will allow us to build a completely new quality for customers in Poland and abroad. His experience will help make STG’s product and technology offer even more innovative and focused on mobile solutions.”

STG Group CEO Mateusz Jurosek after the appointment of Jaroslaw Walaszek as the group’s Chief Information Officer

“We’re really pleased to be partnering with Neccton as we continue to focus our efforts on responsible gaming. Casumo is constantly striving to provide the best possible customer experience in a safe environment, the mentor player protection software will allow us to reinforce this and proactively support our players.”

Benjamin Pule, Head of Regulatory Compliance at Casumo, after the online operator partnered with Neccton for player protection software

GAMBLING.COM GROUP ACQUIRES BONUSFINDER.COM

Gambling.com Group has acquired affiliate business BonusFinder.com.

The company, headquartered in Dublin, has brought BonusFinder under its umbrella after purchasing the business’ publisher, NDC Media.

BonusFinder’s acquisition supports Gambling.com Group’s North American expansion plans, and is expected to be immediately accretive.

Fintan Costello, Chairman of BonusFinder, commented: “These organisations complement each other well as partners within the North American market.

BonusFinder is designed to help consumers find and compare bonuses for online sportsbooks and casinos.

Canada is currently the business’ largest market, and Gambling.com hopes its acquisition will strategically position the group for the anticipated boom of the country’s regulated iGaming market, starting with Ontario’s launch in April.

Gambling.com also wants to capitalise on BonusFinder’s existing US footprint,

where it claims the business has traction. The group said it expects to accelerate growth in the coming years.

“Over the past five years, Fintan Costello and his team have developed a professional, industry-leading, performance marketing business with a customer-centric and brand-driven approach,” said Charles Gillespie, Gambling.com Group CEO.

“The acquisition of BonusFinder gives Gambling.com Group additional scale in the North American online gambling market.

“BonusFinder’s strong presence in Canada is expected to drive increased market share for the group ahead of the anticipated Ontario online sports betting and iGaming market launch in April.”

GI Verdict: It’s a match made in heaven, with both groups understandably excited by the deal given their current objectives, both short term and long term. The North American market continues to expand day by day, with both Canada and the US boasting rapid progress of late.

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PointsBet
3.65 USD  2%

Playtech
658.81 GBP  8%

ARISTOCRAT'S PROPOSED ACQUISITION OF PLAYTECH FALLS THROUGH

Aristocrat's proposed takeover of supplier Playtech has collapsed, as shareholders keep the door open for a potential group of Hong Kong investors. Only 56% of shareholders voted in favour of the Aristocrat deal, below the minimum threshold of 75%.

"Playtech remains in a strong position and continues to perform very well across its core B2B and B2C businesses," said CEO Mor Weizer. "This progress reflects the quality of our technology and products and the hard work and commitment of our talented team. We remain confident in our long-term growth prospects and, in particular, our ability to benefit from the structured agreements (including Caliente) that are already allowing Playtech to access newly opened gaming markets."

Playtech also announced that FY21 results are anticipated to exceed previous expectations. The company stated that since its last trading update in November 2021, it has continued to see a strong performance across both of its core B2B

and B2C businesses.

In the former, the group had strong growth in the Americas thanks to Caliente, and also in Europe. And in the latter, Snaitech saw a "very strong performance driven by continued online strength and recovery in its retail business."

Subsequently, Adjusted EBITDA for the year ended 31 December 2021 is expected to exceed expectations.

"Our employees are at the heart of our success and have remained cohesive and collaborative despite the continued uncertainty surrounding the company," a statement from Playtech read. "The hard work and commitment of our people has contributed significantly to this positive trading performance."

GI Verdict: There isn't too much to add in terms of *Gambling Insider's* opinion here, except for reiterating that this is a massive opportunity missed. Clearly, a group of Asia-based investors sees Playtech's future elsewhere. But what a combination Aristocrat and Playtech could have been. Alas, it's now one for the history books.

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MACAU JANUARY REVENUE 20% DOWN YEAR-ON-YEAR



Macau's gross gaming revenue for January provided a gloomy start to the year for the region's casino industry, according to statistics from the Gaming Inspection and Coordination Bureau.

Pre-pandemic, Macau had established itself as the highest-grossing gambling region in the world.

Now, though, as Nevada continues to post month after month of billion-dollar-plus revenue in the US, Macau is forced to settle for a figure that is 21% down year-on-year.

Indeed, for January 2021, Macau

posted just over MOP 8bn (\$1bn) in revenue; for January 2022, however, the gambling hub has not even reached 10 figures when it comes to US dollars.

A mere MOP6.34bn in revenue was posted by Macau's casinos during the period, which represents a distinct annual fall. "Mere" may seem harsh out of context – but compared to what Macau has generated over the years, this truly is a low number.

This is also a fall month-on-month, and is Macau's lowest gaming revenue figure since October (only October, September

and August, in fact, showed lower totals throughout 2021).

Travel restrictions continue to bedevil Macau, while we can assume there has been an inevitable impact on gambling in the region following the slew of recent arrests and legal stories surrounding junkets.

Macau's unemployment rate, too, has risen recently – leaving any analysts who were hoping for recovery early in 2022 in no doubt they will have to wait considerably longer.

Speculation has been rife as to when Macau will return to its former self, so to speak, but the Covid-19 pandemic has so far had an irreversible impact on revenues.

The highest monthly total amassed in 2021 was MOP10.45bn (May), while the last truly positive tally came just before the pandemic: in January 2020, Macau's casinos generated MOP22.13bn in revenue.

To sum up, Macau's start to 2022 was a more-than-bumpy one in January, to say the least. Let's see how February's figures compare.



What's the risk of unreliable esports data?

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REVENUE REPORTS: COLORADO

December revenue rose 53.43% year-over-year in the Centennial State.

When viewing the year-on-year comparison, it must be noted that table games were temporarily shut down due to Covid-19 in 2020.

ALL-SOURCE REVENUE	DECEMBER REVENUE (M)	% CHANGE 2020	% CHANGE 2019
Black Hawk	\$62.524	+60.58	+25.12
Central City	\$6.949	+36.95	+10.36
Cripple Creek	\$13.336	+33.86	+24.14
TOTAL	\$82.808	+53.43	+23.58

TABLE GAMES	DECEMBER REVENUE (M)	% CHANGE 2020	% CHANGE 2019
Black Hawk	\$11.165	+41.04	-
Central City	\$0.251	+1.82	-
Cripple Creek	\$0.909	+1.39	-
TOTAL	\$12.325	+36.05	-

SLOTS	DECEMBER REVENUE (M)	% CHANGE 2020	% CHANGE 2019
Black Hawk	\$6.698	+32.01	+10.71
Central City	\$51.358	+31.90	+22.12
Cripple Creek	\$12.427	+24.74	+26.22
TOTAL	\$70.483	+30.59	+21.63

SPORTS BETTING	DECEMBER REVENUE (M)	% CHANGE 2020	% CHANGE 2019
Online	\$24.576	+48.41	-
Retail	\$0.156	-73.58	-
TOTAL SPORTS BETTING	\$24.732	+44.20	-
TOTAL HANDLE	\$461.449	+62.17	-



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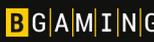
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GUEST INTERVIEW



IVAN KRAVCHUK,
CEO, EVOPLAY

**Kravchuk discusses
Evoplay's artbooks with
Gambling Insider**

Tell us about your new artbook concept? How did the idea come about?

Star Guardians is the industry's first third-person shooter slot to provide players with manual control and player selection, and it doubles as the largest project in Evoplay's history.

Developing the game, we strived to utilise the best of our creative, analytical, business, developmental and artistic knowledge. So it was important for us to not only launch the game, but to acknowledge the hard work that went into it by showing the world exactly how we did it.

We also understood that it needs to be explained in a way that makes sense to both players and casino operators, who are used to seeing completely different casino games on the market. For this purpose, we chose the artbook format which, despite being extremely popular among gamers, has not yet been implemented in the gambling industry.

We're delighted to announce that everyone can now enjoy the artbook for free on our site.

What does the artbook contain?

To make it relevant for both B2C and B2B audiences, we decided to divide the artbook into two parts: storytelling and behind-the-scenes.

The first part is told from the perspective of a survivor of an interplanetary war, who asks the readers and players of today to save humanity.

Part one explains all the details about the universe the game is set in; how it was formed over all these years (based on real and fictional facts), the Tritons and their varieties and unique strengths, and of course, our defenders – the Star Guardians.

We dedicated a separate section to our three heroes, with each having their own origin story, goals, ambitions, fears,

and unique weapons.

The behind-the-scenes part reveals all the key moments of creation, from ideation to implementation, along with all of its challenges and lessons. This is where we address all of the questions that may come to us from the media, our partners and our competitors.

What exactly does this mean for the industry... is Evoplay looking to really shake things up with this new product?

The slogan for our 'behind-the-scenes' part is 'one who is not ready to innovate cannot lead a revolution.'

Nowadays, we're all eyewitnesses of the real iGaming revolution – new audiences, millennials and players from all other verticals are flocking towards iGaming. To appeal to all of them, casinos need not only product differentiators in their portfolio, but also additional engagement tools that will increase demanding new players' interest in the game.

The art of storytelling and the presentation of it in trendy new ways, like in videos and well-thought-out social media campaigns, builds an emotional bond that inspires players to stay loyal to the game.

Through media such as artbooks and comic books, we're changing the perception of iGaming to outsiders and going out of the traditional game cycle of 'spin and win.' Now, it's 'reading, watching, listening, feeling, discovering and achieving.'

What else has Evoplay been focusing on recently?

Summarising the results for the past year, learning from them and setting goals for 2022 have been our focus lately.

Last year was truly transformational for our company – we rebranded, conducted the largest marketing campaign we've ever done, released our new flagship title with an artbook and comic book; and implemented new jackpots and bonus buy features into our games.

This year, Evoplay's desire is to widen our player reach, both with new projects and fresh makeovers on already existing titles that have become staples of our offering. I want to keep our cards close to our chest for now, but I can say this: Evoplay will continue trying to amaze the industry like in 2021, so you do not have long to wait for our next big announcement.

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