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WEEK 02

FRIDAY 12 JAN 2024

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BET365'S FINANCIALS; KAMBI CEO RESIGNS



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THIS WEEK

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SCCG Research

WEEK 02
FRIDAY 12 JAN 2024



BET365
REPORTS
£3.39BN IN
REVENUE

A NEW ERA
FOR KAMBI?



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LONDON



Operator bet365 reported an operating loss of £24.5m for the 2023 financial year, despite having reported a profit in previous years. *Gambling Insider* assesses the results and what they could mean for 2024.

▶ The results from bet365's financial year 2023 have been revealed, prompting industry-wide attention for one of the biggest operators in the sector. The results themselves show interesting trends, prompting *Gambling Insider* to analyse what could be next for the betting giant.

BET365 IN 2023

For the 2023 financial year, which spanned from April 2022 – March 2023, bet365 made £3.39bn (\$4.31bn) in revenue. Compared to the £2.85bn made last year, this represents year-on-year growth of 19%. That also resulted in bet365 contributing £482.8m to the UK Exchequer in tax.

So, how does a company making billions annually conclude the year with an operating loss of £24.5m?

The simple answer is that growth and expansion, especially globally, is expensive. In late 2021, bet365 made its US debut in Colorado and since then has expanded its presence into multiple other states. The US is a highly competitive sports betting market, with DraftKings and FanDuel holding the majority of the market (FanDuel stated that it holds a 47% market share in its Q3 2023 report). Naturally, there is a thesis of 'speculate to accumulate' in the US.

In the 2023 financial year, bet365's IT costs shot up by £585.2m, accounting for infrastructure, development and technology. Moreover, increased revenue resulted in higher direct costs, which were up £96.3m. On top of this, expansion has also called for more employees in the 2023 financial year, up 11% for a total of 7,567 staff.

Paychecks must also be considered when assessing bet365's 2023 operating loss. The company's CEO and Founder, Denise Coates, has been one of the top three highest-paying taxpayers in the UK alongside her family for the past half-decade, according to lists compiled annually by The Sunday Times. High taxes mean a high income and this is certainly true for Coates.

In one recent year, the exec took home a £400m salary, although her 2023 salary equated to roughly half of this. Such a large amount could have been redistributed and taken bet365 from a loss to a profit.

Overall, it seems the net loss of 2023 can be put down to a company investing big, with expectations of big future returns. And that makes sense. The investments being made by bet365 in the 2024 financial year so far suggest that this strategy of 'buy now, get later' has far from run its course.

HOW IS 2024 SHAPING UP?

With the financial year spanning from April to March, we can already put together a prediction of what bet365's 2024 financial report will look like.

From April 2023 onwards, bet365 has entered multiple additional US states, including Louisiana in November, Kentucky in September and Arizona in August. It has also been a vessel through which several game suppliers have launched into new global territories, with Pragmatic Play partnering with bet365 to launch its online game portfolio in Ontario in May and Play'n Go doing the same to launch its portfolio in Greece in October.

Despite the work done to establish a successful 2024 last year, with the launch of new products and partnerships with major football teams like the Cleveland Guardians, bet365 has not slowed down. In fact, it seems the operator has done more so far this financial year than it did the year before.

In 2021, bet365 reported an operating profit of £469m; in 2022, this profit fell by almost 90%, down to £49.8m. This year, operations were at a loss, showing a downward trend over the past three years. While bet365's 2023 investments may provide leverage to buck this trend, with the amount of investment conducted by the company so far this year, is a continuation of this trend inevitable? Especially when cashflow is not a problem for its owners.


GI VERDICT


With the level of investment work, product launches and partnerships taken on by bet365 in the 2023 financial year, it shouldn't come as a huge surprise that the company is operating at a (relatively small) loss. Big returns need big investments, which lines bet365's 2024 financial results up to be particularly interesting. Since launching in Colorado in September 2022, bet365 is now live in over half a dozen states, generating millions of dollars every month. In Ohio in December for example, bet365 generated \$3.7m, making it the fourth-most profitable operator in the Buckeye State.


But, with the amount of investments the company is still making, will 2024's financial results be too soon to quite reap the rewards? Most likely, investments made in 2023 will start to generate returns in 2024, which will act as a cushion for the impact of any 2024 spend. In the US particularly, though, with market share still far from the leaders, we are perhaps some way off those returns fully materialising. Bet365 is playing the long game.


TAKING STOCK


TAKING STOCK SHARE PRICES COVER
THURSDAY 4 JAN 2023 TO THURSDAY
11 JAN 2024 (10:00 AM GMT)


Light & Wonder  1.3%
79.09 USD


Bragg Gaming Group  0.4%
5.15 USD


Gaming Corps  23.7%
1.70 SEK

Betsson  5.8%
114.60 SEK

Gaming Innovation Group  0.7%
29.35 NOK

Golden Matrix Group  5%
2.27 USD

Playtech  2.3%
441.80 GBp

Kambi Group  1.1%
159.80 SEK

A NEW ERA FOR KAMBI?

This week, Kambi Group announced the resignation of its long-time CEO, and Co-Founder, Kristian Nylén.

Nylén worked with a number of others back in 2009 to launch an 'outsourced sportsbook' and, in 2010 when Kambi was formed, became the CEO. However, he has now, decided to stand down from the position.

In light of his departure, Nylén has been proposed for election to the Board of Directors at the upcoming 2024 Annual General Meeting (AGM) by Kambi's Nomination Committee; by accepting this nomination, Nylén aims to focus on the strategic aspects of Kambi's operations as he reduces his overall workload.

The main reason Nylén references for his departure is wanting to spend more time with his family: "The decision to stand down from my position at Kambi after so many enjoyable years has been difficult, but one predominantly driven by my desire to spend more time with my young and growing family."

Nylén has played a key role in the growth of the provider, from its formation in 2010 to the company gaining a listing on First North at Nasdaq Stockholm four years after.

On top of this, Nylén was key in Kambi's Latin American expansion, which included becoming the first sportsbook provider to operate in the city and region of Buenos Aires in Argentina, as well as a number of other agreements. Needless to say, it has secured several partnerships with tribes in North America.

One of the big setbacks during his tenure with Kambi would have to be when previous big-name clients, DraftKings and Penn Entertainment, terminated their contracts with the company.

Kambi is of course known as one of the leading sportsbook suppliers in the market and has recently experienced sustained growth, emphasised by its Q3 2023 results posted back in November.

Within those results, Kambi's Q3 revenue was valued at €42.1m (\$46m), up 15% compared to Q3 2022, while EBITDA was €13.9m, up 30% from the same period in 2022. Operating profit also rose by 19% to €4.6m; and profit after tax also rose 37% to €3.5m.

During that period, Kambi's initiative was underlined by securing 24 partner launches in Q3 2023, including eight in the US for new partner Bally's, in the states of Arizona, Colorado, Mississippi, New Jersey, Ohio and Virginia.

While Nylén has clearly enjoyed many achievements during his time at Kambi, the time to bring in a new CEO might be just right, with the company already starting to recruit new personnel in other roles, such as Anders Ström being appointed Chair of the Board back in November. Recent weeks may highlight Kambi's desire to take the organisation to a whole new level.

It has shown consistent growth up to a point, but it may be time for a new era if the supplier wants to accelerate from here.

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MOVERS &

SHAKERS



NICK DUTTON
Group COO
Fitzdares

Dutton brings 36 years of experience in IT and technology, with most of his roles being within the gaming sector.



HAMPUS ERIKSSON
Group Deputy CEO
PressEnter

Eriksson previously held the position of CPO at PressEnter, in which he was responsible for rebuilding the company's processes and product capabilities.



SIMON DUDNJK
Chief Human Resources Officer
Bragg Gaming

Dudnjik joins Bragg from Sportradar, where he spent 12 years in a variety of roles, most recently serving as VP, People Partnering.



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MOVERS &
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MICHAEL MARCHETTI

 Board of Directors
Light & Wonder

Prior to this appointment, **Marchetti** was the Director of SciPlay Corporation, which was acquired by Light & Wonder in October 2023.


MARK PURDY

 Business Development Director
Reflex Gaming

Purdy brings 25 years of experience in the industry and in his previous role was the Product Management Director, EMEA, for Light & Wonder.


DANA REYNOLDS

 Director of Brand Marketing
Cosmopolitan

Reynolds has worked in the same position before at the Mandalay Bay Resort and Casino and prior to that was the Director of Marketing at Luxor Hotel & Casino.



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Play Outside the Box

GI THE DEALMAKERS FRIDAY

THE WEEK IN QUOTES

“At Mohegan, we understand that a diverse workforce is key to fostering creativity, innovation and a dynamic environment where new ideas thrive. We are immensely proud of this recognition, and being named to this prestigious list reflects our ongoing commitment to diversity and inclusion and underscores the success of our efforts to integrate diversity at every level of our operations.”

Mohegan President and CEO, Ray Pineault, on Mohegan being named one of Newsweek America's Greatest Workplaces for Diversity for 2024

“We are extremely pleased with our strong year-on-year operating results and continued expansion into new regulated markets. We are especially excited about the recent legislation for online casino and sportsbook in Brazil one of the world's largest gambling markets.”

MeridianBet CEO, Zoran Milosevic, on the company's net profits for 2023 and pending acquisition of Golden Matrix Group

COMPANY	NEW PARTNER	VERTICAL
SCCG Management	Baum Games	iGaming
7777 Gaming	Megawin	iGaming
Montonio	Totalizator Sportowy	Lottery
Okto	Betsson Group	Payments
Spinomenal	Vegas.hu	iGaming
Thunderkick	Skywind Group	iGaming
Four Winds Casinos	Strive Gaming	iGaming
Peter & Sons	SkillOnNet	iGaming
Blokotech	Xprizo	Payments
Grand Casino Hotel Resort	Agilysys	Technology

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"It's time for 7,700 workers employed at 21 properties to get a fair contract and have security for themselves and their families. Corporations are making record profits and workers deserve to have record contracts.

Workers at the Strip Independents and Downtown deserve the same wage increases, benefit protections, safety and technology language and reductions in workloads as the rest of the Strip and they are organized and ready to fight for it."

Secretary-Treasurer for the Culinary Union, Ted Pappageorge, on setting a strike deadline of Friday 2 February 2024 amid negotiations with 21 casino resorts

"We are delighted to launch our second slot with BetMGM and it doesn't get much bigger than Star Trek. We are very proud of this game and we have no doubt it will go intergalactic. Building on our already deep relationship with BetMGM, this is the start of many big titles to come in 2024."

CEO of Atlantic Digital, Sam Hobcraft on BetMGM's release of Star Trek: The Next Generation slot game

LEGAL ROUND-UP: GLOBAL LEGISLATION

This week, gaming companies faced setbacks and scrutinisation, while new legislation safeguarding people from gambling harm has also been implemented elsewhere.

In the UK, **Gamesys** received a £6m (\$7.6m) fine from the Gambling Commission due to social responsibility and anti-money laundering failings. This comes after a compliance assessment in May 2022, which found breaches dating back to November 2021.

In other regulatory news, **Rush Gaming's** licence has been revoked by the Malta Gaming Authority. The company is no longer authorised to carry out gaming operations in Malta and must refund all its players for any funds still left in their accounts.

Over in the US, Georgia's efforts to legalise sports betting faces further hurdles. Despite the **Senate Regulated Industries** committee voting 8-4 in favour of advancing Senate Bill 172 to legalise and regulate sports betting, the

bill will require a state constitutional amendment to be implemented. Disagreements on how the clause should be amended raise uncertainty around the future success of the bill.

Back in Europe, France's **National Gaming Authority (ANJ)** has issued requirements for gambling operators to submit their promotional strategy for approval each year. The ANJ requires operators to moderate the use of incentive-based promotional tools, especially for players who maybe at an increased risk of problem gambling.

Meanwhile, Germany also implemented new measures to protect people from gambling harms. Indeed, **IDnow**, an identity verification platform, has been approved. The technology complies with the German Interstate Treaty on the Protection of Minors in the Media, which mandates that certain adult content can only be distributed online with effective age verification systems.

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THE WEEK IN NUMBERS



\$165.6m

Gaming revenue for Maryland in December 2023

\$15.2m

Total amount paid by Circa Sports to winners of its professional football contest



\$200,000



Amount donated by Boyd Gaming to nearly 190 non-profit organisations across 11 states

SPORTS BETTING ROUND-UP: HORSERACING, CRICKET AND ESPORTS

Sports betting news was in abundance this week, with launches and partnerships taking place around the globe.

Sports Information Services (SIS) this week expanded its online sports content offering, which will see content from all three of Poland's horseracing tracks, located in Warsaw, Wroclaw and Sopot. The content will cover 60 meetings annually between April and November, providing further betting opportunities for operators. This deal expands SIS' horseracing content, adding it to multiple locations in Europe including the UK, Ireland, Germany and Spain.

Elsewhere, **ParlayBay** has announced a partnership with **96.com**, which will see the supplier provide its cricket content portfolio to the online gambling platform, allowing ParlayBay to expand its presence across Asia. ParlayBay can geo-localise its content to provide relevant offerings to all demographics,

with cricket becoming one of ParlayBay's fastest-growing sports, producing a growth rate of over 1,000% month-on-month. This deal comes ahead of the new Indian Premier League season coming in March, which ParlayBay will support with promotional and marketing tools.

Meanwhile, **Smarkets** has secured an agreement that will see **PandaScore** provide the betting exchange with its esports betting products. Smarkets will integrate PandaScore's odds feed, which covers hundreds of pre-match markets across thousands of events. This feed includes PandaScore's range of player markets, bet builder and microbetting products, while Smarkets can also access 24/7 trading support as well as post-match detailed odds analysis.

Finally, and also in the esports world, supplier **Beter** agreed to a partnership with operator **Novibet**. Novibet's Director of Sportsbook, Thanos Gkiokas, praised Beter's "premium content."



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GI THE DEBRIEF FRIDAY

This week was a significant news week for tribal gaming.

First off, the Koi Nation of Northern California announced a support collation for its proposed Shiloh Resort & Casino project in unincorporated Sonoma County. Former elected officials, public agencies, labour unions, tribal governments and members of the public are among those who have shown their backing of the project. In January 2022, the Koi Nation partnered with the Chickasaw Nation of Oklahoma and its wholly owned subsidiary, Global Gaming Solution (GGS) to develop the resort, which is set to have a 400-room hotel, entertainment venues and a variety of gaming options. The tribe will gain income, jobs and economic benefits to the surrounding community.

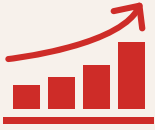
Recently, tribes have been embracing technological advances, and this week saw Four Winds Casinos and Strive Gaming secure an agreement. The Pokagon Band of Potawatomi Indians of Michigan

and Indiana own and operate Four Winds Casinos and this deal will see Strive Gaming power its online gaming services in Michigan, with its customer services, technology, bonusing tools and app. Strive will also incorporate Four Winds into its Infinity Engine, which features operational automation and contextual real-time engagement.

Finally, tribal operator Mohegan was this week recognised for its workplace environment. Newsweek released a list of America's Greatest Workplaces for Diversity 2024 and Mohegan was among the workplaces included. Newsweek and market data research firm Plant-A Insights Group compile the list of companies that are recognised by their employees for "genuinely respecting and valuing individuals from different walks of life." The methodology looks at how effectively companies create and maintain an environment that supports and celebrates diversity.

Tribal casinos, of course, hold significance for US communities, providing economic benefits and helping wider society. So a good tribal gaming week is, generally, a win-win.

75%



The year-on-year rise in total bets reported by OddsMatrix from 2022 to 2023

\$2bn

Mobile sports betting revenue for New York in December 2023

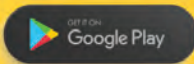
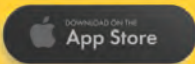


£10,000

Donated by The National Lottery to The Yard Project at St Edmundsbury Cathedral in support of youth mental health (\$12,700)



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IOWA GAMING REVENUE FOR DECEMBER

Iowa reported its December 2023 gaming revenue, which totalled \$182.3m. This reflects year-on-year growth of 11.7%. Excluding sports betting, total revenue was \$156m, growing 9.5% from this time last year.

Of the 19 operators listed, the operator with the highest all-sources revenue was Casino Queen Marquette, which generated \$26.3m. It was also the operator with the largest year-on-year growth, up 73.7%. The second and third highest revenue generators were Ameristar (PENN) and Horseshoe (CZR), making \$19.6m and \$17.4m respectively.

In terms of year-on-year growth, the top five were Casino Queen Marquette, Wild Rose – Emmetsburg, Wild Rose –

Jefferson, Grand Falls (Elite) and Diamond Jo Dubuque (BYD). The Wild Rose's year-on-year revenue was up 47.9% and 36.4% respectively, with Grand Falls up 35.4% for total revenue of \$9.9m. This is despite the casino receiving a \$5,000 fine in late November for failure to update its self-exclusion list.

In contrast, another casino that received the same fine, Rhythm City (Elite), only grew 1.3% from December 2022. The casino generated \$10.3m in December.

Only three operators in the state reported a year-on-year decrease; Catfish Bend, Horseshoe (CZR) and Q Casino. These operators reported decreases of 1.2%, 2.9% and 14.1% respectively. Despite this, Horseshoe was still the third most financially successful operator in the state.

The three operators to contribute the

least to the Hawkeye State's gaming revenue were Catfish Bend, Terrible's Lakeside (Affinity) and Q casino. Both Catfish Bend and Terrible's Lakeside (Affinity) generated a rounded \$4.4m, while Q Casino generated \$3.5m.

When assessing the sports betting revenue generated in Iowa, Q Casino saw the most substantial year-on-year growth, up 80.8%. This is followed by Wild Rose - Emmetsburg and Ameristar (PENN), with sports betting revenue up 78.1% and 77% respectively. Diamond Jo Dubuque (BYD) generated the most in terms of sports betting revenue between the operators in the state, making \$7.2m.

Total sports betting revenue for Iowa in December was \$26.3m, with a handle of \$282.7m. This was year-on-year growth of 26.5% and 23% respectively.

IOWA GAMING REVENUE REPORT

ALL-SOURCES REVENUE	REVENUE (M)	CHANGE (%) YEAR-ON-YEAR
Casino Queen Marquette	\$26.30	+73.7
Wild Rose - Emmetsburg	\$5.90	+47.9
Wild Rose - Jefferson	\$7.20	+36.4
Grand Falls (Elite)	\$9.90	+35.4
Diamond Jo Dubuque (BYD)	\$14.30	+30.2
Wild Rose - Clinton	\$5.80	+22.1
Ameristar (PENN)	\$19.60	+17.7
Diamond Jo Worth (BYD)	\$11.60	+15
Terrible's Lakeside (Affinity)	\$4.40	+8.2
Prairie Meadows	\$6.70	+7.6
Isle Waterloo (CZR)	\$9.40	+6.9
Riverside (Elite)	\$11.30	+6.6
Isle Bettendorf (CZR)	\$6.70	+4.2
Hard Rock	\$8.40	+1.6
Rhythm City (Elite)	\$10.30	+1.3
Harrah's (CZR)	\$6.40	+1.2
Catfish Bend	\$4.40	-1.2
Horseshoe (CZR)	\$17.40	-2.9
Q Casino	\$3.50	-14.1
Total	\$182.30	+11.7
Total (excl. sports betting)	\$156	+9.5

**GUEST****COLUMN****THE SCCG
RESEARCH TEAM**

SCCG assesses the advantage of AI in casino loyalty programmes, and how it can boost retention and satisfaction

AI

In the competitive landscape of the gambling industry, the use of Artificial Intelligence (AI) and Machine Learning (ML) in loyalty programmes has emerged as a game-changer, particularly in appealing to younger generations. Recent data underscores the dramatic impact these technologies have on customer retention and satisfaction.

The utilisation of AI in loyalty programmes has shown a remarkable 10.5% improvement in customer retention, a 10.1% increase in customer satisfaction and an 8.8% enhancement in the customer effort score. In contrast, non-users of AI reported much lower improvements of 3.2%, 2.9% and 1.1% in the same metrics, respectively. These figures are not just numbers; they represent a paradigm shift in how loyalty programmes should be approached, with a clear message: embracing AI is no longer optional if companies wish to remain competitive.

The importance of integrating AI into loyalty programmes becomes more pronounced when considering the engagement of younger demographics. The data reveals that younger generations are enrolling in loyalty programmes at significant rates, with 45% of Gen Z and 56% of Millennials participating in two to four programmes. This suggests a penchant for rewards and recognition among these cohorts, which can be strategically leveraged using AI-driven personalisation.

AI and ML technologies can analyse vast datasets to understand consumer behaviour and preferences, enabling the creation of tailored rewards and experiences that resonate with individual tastes. For the gambling industry, where the battle for customer loyalty is intense, such personalised experiences can mean the difference between a one-time visitor and a lifelong patron.

TYPE	CUSTOMER RETENTION	CUSTOMER SATISFACTION	IMPROVEMENT IN CUSTOMER EFFORT SCORE
Using AI	10.5%	10.1%	8.8%
Non-user	3.2%	2.9%	1.1%

2020-21 *Year - Over -Year Percent Change

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Furthermore, with the technological savvy of younger generations, the expectation for seamless and intuitive interactions has never been higher. AI can streamline processes, reduce the effort required to participate in loyalty programmes and predict which rewards a customer might prefer, thus enhancing the overall user experience.

To stand out, gambling enterprises must not only offer rewards but also ensure these rewards are relevant, accessible and desirable to a younger audience. This could include leveraging AI to offer instant rewards, gamify the loyalty experience or provide real-time, AI-powered support.

The integration of AI into loyalty programmes is not just a matter of attracting the elusive younger generations; it is also about setting a standard for customer engagement

across all demographics. As seen in the data, while younger generations are leading the charge in the enrolment of multiple programmes, older generations are not far behind, with Boomers enrolling in five to nine programmes at a rate of 29%.

In conclusion, the intelligent use of AI and ML in loyalty programmes is a crucial strategy for the gambling industry. It's an investment in customer satisfaction and retention, and addresses the evolving expectations of younger generations while also catering to the established preferences of older customers. For gambling enterprises, the message is clear: those who innovate will thrive and those who don't will find themselves left behind in a rapidly advancing digital age.

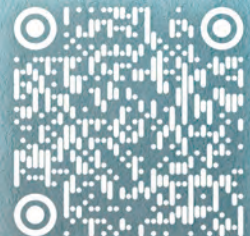
You can download the new SCCG Research Primer on loyalty marketing and AI (2023).

LOYALTY OR REWARDS PROGRAMMES ENROLLED IN	GEN Z	MILLENNIALS	GEN X	BOOMERS	TOTAL
None	24%	11%	13%	9%	12%
1	25%	11%	12%	8%	12%
2-4	45%	56%	50%	44%	49%
5-9	4%	15%	10%	29%	20%
More than 10	2%	6%	6%	6%	6%



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