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Digital

Official Event Guide

Day 3 • May 13, 2020

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WELCOME

WELCOME TO ICE NORTH AMERICA DIGITAL!

While the in-person event has been rescheduled for Spring 2021, it is my pleasure to welcome everyone to our inaugural ICE North America Digital week. It is great to see so many of you online wanting to connect and interact.

Bringing an entire week of live streamed content, ICE North America has been designed to deliver a comprehensive selection of discussion, expert insight and thought leadership in an online webcast environment.

As an exhibition business, shifting into a digital environment has involved engaging the team in a new challenge, but thanks to a collective and collaborative effort we're able to continue to provide content dedicated to current trends in the fast-moving North American market—be those land-based, sportsbook, online or hospitality tech-related.

More than 3,000 people have signed up from all areas of the industry, including land-based, online, sportsbook, lottery, casino and hospitality technology. There are also a mixture of operators and suppliers from both sides of the Atlantic, so I encourage you to connect with as many people as you can!

Once on the event platform you will notice a number of exciting functionalities, which put usability and connectivity at the forefront. This will allow you to easily access the live stream for each session, take part in discussions with industry leaders, customize your schedule and chat “face-to-face” with those who are eager to learn and do business, despite current difficulties.

Our thanks go out to all our sponsors, partners and associations who have been driving this initiative forward with us and I hope that you have a great experience throughout.

Enjoy!

Rory Credland

Event Director | Clarion Gaming



DAY 1 HIGHLIGHTS

Day one of ICE North America Digital kicked off with a debate on iGaming and how it could offer land-based gaming establishments a lifeline once normal life resumes. Moderator **Marie Jones**, an attorney at **Fox Rothschild LLP**, was joined by **Aviram Alroy**, VP Interactive Games at **Mohegan Sun**, **Jesse Chemtob**, General Manager and VP of Casino at **FanDuel Group** and **Michigan State Representative Brandt Iden** to answer questions on the impact it has had – and will continue to have – on bricks and mortar properties. Not only did they examine the strategies operators are utilizing to generate revenue and engage with their customers, they also examined the legislative imperative in states that have yet to open up online, and how it is set to play a pivotal role in the phased re-opening of states that have.

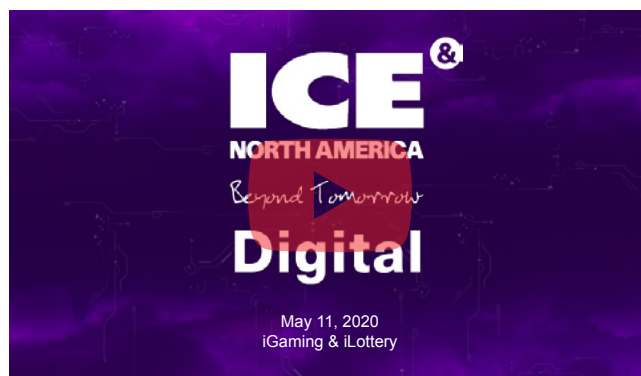
Aviram was the first to contribute, indicating that growth in online players, many of whom were existing land-based customers making the switch, was very positive for the industry. He was hopeful the statistics would encourage states and land-based only operators to understand the value of having a diverse portfolio. Jesse agreed, suggesting they should view online as complementary rather than competitive, particularly given that many trying it for the first time were existing land-based patrons. Brandt suggested taxation would help states starved of funds in the months to come and highlighted the slow processing of licences as a need to get on with it. He

also called for shared liquidity to make it more attractive to players.

The panel then considered the importance of monitoring players to ensure better protection during the stay at home period, with Aviram suggesting this was far easier to do online and Brandt pointing to the sophisticated technology available to online operators. He also suggested the online world was a great opportunity for venues to grow their database, with Jesse holding New Jersey up as a great example of the opportunities on offer to states who take the plunge.

The second panel session of the day also focused on online – but this time iLottery, and how regulation is catching up with technology. With **David Isaacson**, VP **Spectrum Gaming Capital** in the chair, **Gordon Medenica**, director **Maryland Lottery and Gaming**, **Lauren Walker**, Director Interactive content and customer Service at **Kentucky Lottery** and **Ludovico Calvi**, President **Global Lottery Monitoring System** looked at the importance of having agile online products and platforms to complement – and improve – retail performance.

Gordon began proceedings by maintaining the importance of keeping retail partners onside, with Lauren stating that Kentucky had made a very



conscious decision to ensure pay-outs were the same in retail and online to do so. This had helped retail revenues continue to grow. Ludovico said it was hard to convert lotteries from being a cash-based businesses, but that changing consumer habits married to the Covid-19 epidemic was speeding that up. He also suggested the growth of sports betting was helping operators in different verticals in the U.S. adopt an omni-channel approach.

Gordon went on to allay fears that the older lottery players won't take to online by suggesting the demographics were almost identical to the state they resided in. He also highlighted lotteries universal appeal. Lauren said big draws appealed to those in their 40s, whilst the real variety in iLottery products was drawing in the 18-25 year olds. As the debate then swung to sports betting as having potential for lottery operators, Gordon concluded that launching any kind of licensed iGaming was important to combat illegal operators.

To watch the full-length stream of each session held on Monday, May 11 during ICE North America Digital, please [click here](#).

DAY 2 HIGHLIGHTS

Day Two of ICE North America Digital began with a discussion between senior legislators and regulators on the current state of play following the Covid-19 pandemic. **Sandra Douglas-Morgan**, Chairwoman of the **Nevada Gaming Control Board** said operators needed clear guidance on their operational requirements to reduce the exposure of staff and customers to the disease. Regulators, like the NGCB, had a duty to help, she added. She then moved on to discuss alternative channels which were gaining popularity in absence of live sport, suggesting they had been evaluating the regulation of esports betting for some time now. She suggested a powerful governing body armed with strong penalties to enforce integrity would be a must.

Michigan State Representative Brandt Iden said iGaming and mobile sports betting could be live as early as August or September in his state. The side-lining the black market that would follow will be important for both state revenues and consumer protection. **Christopher Hebert**, Gaming Division Director for the **Louisiana Attorney General's Office**, suggested their priority was a calculated re-opening of land-based casinos as the reduction in taxation had been 'catastrophic'. He said we could see sports betting in the Pelican State as early as July 2021, including college betting, and he was intrigued to see how Covid-19 would affect legislators who voted against it

last year.

Day two's second panel session focused on the rapid rise in popularity of virtuals and eSports in recent times. **Scott Warfield** Managing Director, Gaming, **NASCAR** revealed its eNASCAR iRacing Pro Invitational Series had been averaging over 1 million viewers in over 60 countries, with week one welcoming 250,000 viewers who'd not watched any other NASCAR event this year. He concluded that it will never replace live sports but had been a great activation opportunity at a difficult time. **Steve Rogers**, Chief Commercial Officer, Virtuals, at **Inspired Entertainment** said the company's Virtual Grand National had attracted nearly 5 million people in the UK, whilst the Virtual Kentucky Derby was on primetime TV in the U.S. for three hours.

Seth Young from **Pointsbet**, **Bill Anderson** of **BetGenius** and **Kresimir Spaijic** of **Hard Rock International** picked up the baton, with Young suggesting they would have a busy back end to 2020 as they roll out in Colorado, Illinois and Michigan. Kresimir said it was a good opportunity to focus on products and operations, with 'bricks to clicks' being at the front of many people's minds. Bill said the industry had been given the gift of time to get their



product right. Seth is confident, meanwhile, that the need for tax revenues could speed up legislation. Would large states like Florida, New York and California be next in line?

In the final session of the day, **Daniel Kustelski**, Co-founder and CEO of **Chalkline Sports** and **Michael Daly**, General Manager U.S. for **Catena Media** discussed the opportunities presented to performance marketers by the current crisis. The latter stated that casino and poker had become exceptionally strong business for affiliates but it was important to take into account customer spending power when negotiating CPA. Daniel urged operators to launch as soon as possible, in spite of the absence of sport, with targeted and regionalised marketing. Michael concluded that he hoped it led to more conversations about the long-term balance of land-based and online gaming in the U.S.

To watch the full-length stream of each session held on Tuesday, May 12, please [click here](#) and navigate to the 'program' tab in the event platform.

ACCESSING THE EVENT PLATFORM

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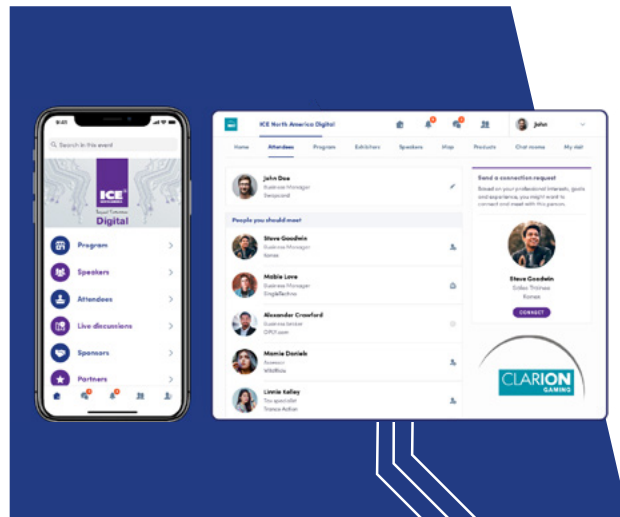
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Login to the ICE North America Digital Web App



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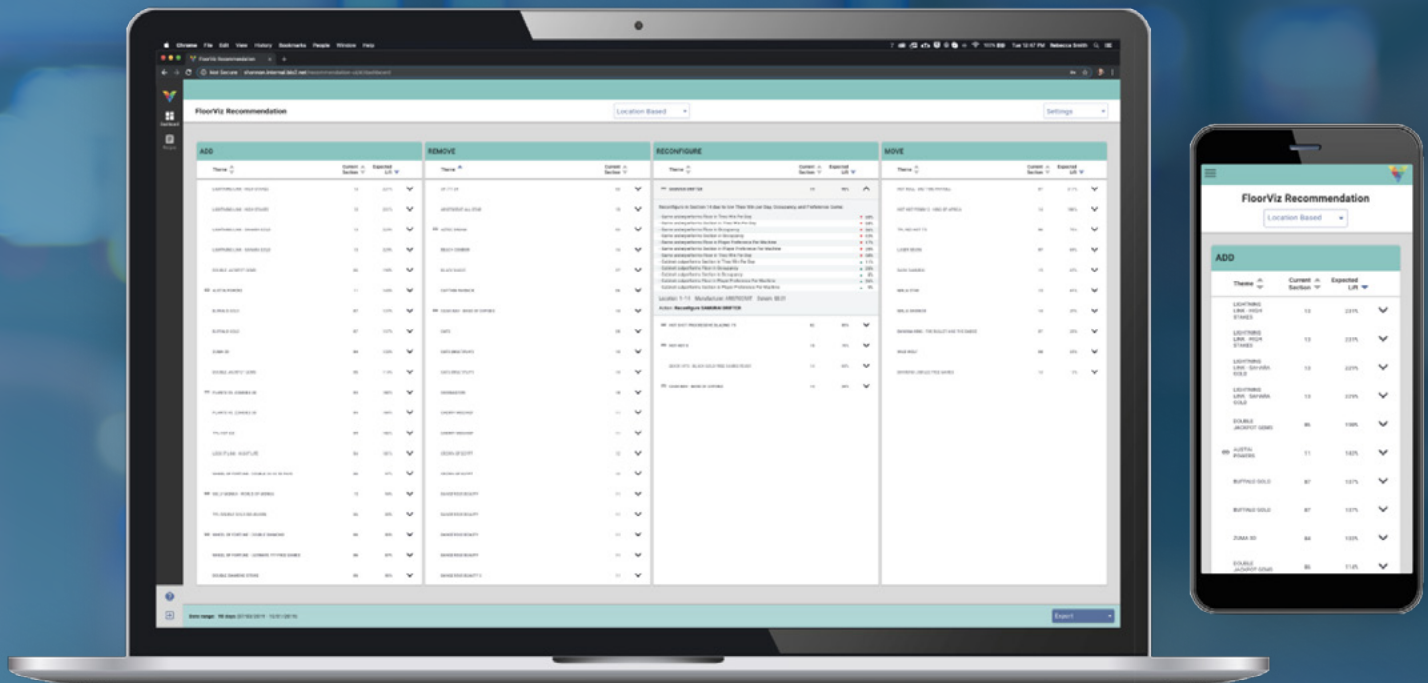


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AGENDA



WEDNESDAY, MAY 13 –
CASINO, HOSPITALITY & ENTERTAINMENT

🕒 4:30PM BST

WELCOME

Hosted by



Brendan Bussmann, Partner,
Global Market Advisors



Katherine Spilde, Professor,
San Diego State University (SDSU)

QUICK TAKE ON: USING
ANALYTICS TO IDENTIFY THE
CORRECT GAMES TO KEEP ON
THE CASINO FLOOR IN THE TIME
OF SOCIAL DISTANCING



David Patent, CEO,
VizExplorer



EXPOSE – PREPARING FOR
REOPENING: HOW CAN YOU
MAKE SURE YOUR PROPERTY IS
READY

- Re-opening the casino's: What is the roadmap?
- Staff and Inventory – How do I re-hire and what do I need?
- Social distancing and hygiene – preparing properties for life after COVID



Michael Soll, President,
The Innovation Group



Kelley Tucky, M.Ed., Founder and
Senior Consultant, Ithos Strategic
Communications



Ellen Whittemore, EVP and General
Counsel, Wynn Resorts

Followed by Q&A

[REGISTER FOR THE SESSION](#)

🕒 4:55PM BST

QUICK TAKE ON: REVENUE
MANAGEMENT, POS AND
FRONT DESK SYSTEMS – THE
CORE TECHNOLOGIES KEEPING
YOUR PROPERTY EFFICIENT AND
STREAMLINED



Ryan Carrier, Director – Corporate &
Tribal Casino Resorts, Agilysys

FEATURE – DATA DRIVEN
EXPERIENCES

- How operators can effectively reach their customers in the current environment
- Utilising preference tracking technology and customer insights to optimize offerings and messaging
- How marketers can shape their data collection to be actionable



Brian Edwards, Founder & CEO,
Edwards Technologies. Inc



Corey Padveen, Partner, T2 Marketing
International

Followed by Q&A

[REGISTER FOR THE SESSION](#)

AGENDA



WEDNESDAY, MAY 13 –
CASINO, HOSPITALITY & ENTERTAINMENT

5:15PM BST

QUICK TAKE ON: THE BEST GAME WHICH IS BREAKING RECORDS NOW IS LIVECASINO

Online casino gambling and Bingo have been the industry's saviour during the pandemic, with many firms posting record results since quarantine began. We find out which games are achieving record revenues during this crisis.



Anna Shahbazyan,
Regional Director,
BetConstruct

BETCONSTRUCT

EXPERT OPINION – HOW NON-GAMING AMENITIES CAN DRAW CUSTOMERS BACK TO YOUR PROPERTY

- Utilising non-gaming entertainment such as spa's, golf courses and restaurants to appeal to a variety of demographics
- Preparing for different spending habits and customer behaviours post COVID-19
- Differences between resort and regional sites



Moderator:
Scott Fisher Ph.D.,
Managing Partner,
Convergence Strategy Group

CONVERGENCE
STRATEGY GROUP



Bobby Soper, President & CEO,
Sun Gaming + Hospitality



Cynthia Kiser Murphy, C-Suite
Gaming Executive



Lana Kotur, VP of Customer Success,
VizExplorer

Followed by Q&A

[REGISTER FOR THE SESSION](#)

5:45PM BST

FEATURE – NATIONAL INDIAN GAMING ASSOCIATION'S INDUSTRY UPDATE AND OUTLOOK



Chairman Ernie Stevens, Chairman,
National Indian Gaming Association



Ewa Bakun, Director of
Industry Insight and Engagement,
Clarion Gaming

[REGISTER FOR THE SESSION](#)

INTERVIEW

Back to business – why resort operators should focus on digital initiatives

With rumblings that the Las Vegas strip could re-open as soon as the middle of May, the destination's famous casinos are already preparing to welcome back guests.

Yet, the impact of social distancing on societal behaviour is likely to affect how resorts interact with customers, as people remain cautious of human interaction and contact points, but also expect a high standard of service.

Brian Edwards, Founder of Edwards Technologies Inc., believes that advancing on-property digital initiatives offers the "fastest and most efficient way" for operators to cater for the shift in guest expectations and tailor the experience to their preferences.

"Customer behavior will undoubtedly evolve in the short term as a result of the COVID-19 pandemic, but no one yet knows how," he says. "One certain outcome of the crisis is that guests will be one of the most valuable assets to resorts and need to be treated as such."

"After everything people have been through during this time, they will want to feel like they are receiving extra special treatment from the moment they walk back through the resort doors."

When the strip is given the green light to re-open, competition for customers among resorts is expected to be fierce. Re-establishing brand loyalty will be crucial to getting ahead as the market returns to normality, Edwards adds.

Once those customers are through the door, the priority is then to increase per capita revenue, particularly if guest volumes are to remain restricted in the short to medium term. According to the Edwards Technology Founder, digital initiatives, such as in-room interactive concierge services, can reap major benefits in boosting on-site spend.

"Easy-to-implement digital techniques that offer convenience can add small but incremental value that maximizes guest spend throughout their stay," Edwards says. "If we know a customer likes steak, for example, we can offer restaurant suggestions and reservation times as soon as they get to their room after check-in."



On-property technology can also provide a bridge to how resorts communicate with their guests, especially in the event that re-hiring and re-training staff lags behind initial demand. This could include services which offer alternatives if there is a long wait time at a popular restaurant, or systems which can assist with common guest queries and needs if a member of staff is not immediately available.

The "Holy Grail" in offering these services, however, is data. According to the hospitality technology expert, by mining guest data points operators can make recommendations or advise customers on how to make the most out of their stay at the resort and thereby maximising per capita revenue.

"By using data and machine learning (also known as AI), operators can deliver a new type of experience that solves the issue of making guests feel important and creating a more curated visit," Edwards explains. "For the past two years we have been working with top names in gaming to define these opportunities – accelerating those digital initiatives is as critical now as ever."

With budgets currently wrung dry after almost a month of closure, the capacity for operators to upgrade technology and implement digital strategies is most likely limited, particularly where large upfront investments are required.

But Edwards explains that new financial models combining the hardware and software into a monthly charge inclusive of upgrades are in development, addressing the financing and upgrade cycles "that all large companies face and typically suffer through".

Edwards is set to discuss data driven experiences, on 13 May. [Click here](#) to add to your schedule of sessions you want to stream.

CASINO

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SPORTSBOOK

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45,000 live matches
120+ sports types



END-TO-END

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ESPORTS

24/7 Betting and plenty of virtual games



REAL MONEY AND SOCIAL

White label Social Casino platform with hundreds of unique games



MULTICHANNEL

Ready to plug-in retail, mobile and interactive extensions



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ICASINO NEEDS

INTERVIEW

AI and contactless on the way as operators re-engage

How can operators make the most of this time to maintain customer engagement and ensure they are the destination of choice once restrictions are lifted?

Considering everything that's going on, it is a particularly difficult time to engage users outside of the primary focal point of most content: the global COVID-19 pandemic. That doesn't mean that operators and other brands can't find creative ways to engage their user base with content that is not specifically promotional. The key is finding creative ways of sharing a message that both takes into account our shared current circumstances - even passively - and engages users with creativity. One of the ways we're seeing this happen is with live video content. Live feeds across social channels wherein questions are answered, behind the scenes content is shared, and a different, more personal side of a brand is showcased, has been particularly effective in both building stronger bonds with audiences, as well as engaging a customer base outside of the traditional onsite or on-property engagement we're accustomed to seeing.

What types of tools are in place for data collection?

Considering the current environment, every brand touchpoint is digital. That means that data collection is possible throughout the entirety of the customer experience. There is no reason why brands shouldn't be trying to collect data - whether actively collecting it explicitly from the user, or passively with effective tracking mechanisms - every step of the way. Data collection tools can range anywhere from onsite forms or surveys for explicit data gathering, to passive tracking using free tools like Google Tag Manager. Whatever the case, data collection and analysis is crucial and effective to the successful recovery effort that we're hoping to see in the near future.

Given the social distancing measures likely to be in place when establishments re-open, how will operators have to adapt their interaction with customers and what tactics and tools can they utilise to help?

A trend that we've seen inching toward standardized adoption is the contactless/AI guest experience. Take the Henn-na Hotel in Japan, which operates entirely through the use of robots and AI. These high-concept properties have seemed largely



like a gimmick - a velociraptor can check you in, for example - but the fundamental applications will likely expand considerably as properties begin to reopen. Guest safety and well-being are going to be top of everyone's mind, so doing away with lines, a check-in counter, and keycards, for starters, is almost certainly going to be a crucial step in reopening to visitors' satisfaction.

Hygiene will be a big factor. How do operators keep their staff and customers healthy and happy?

As noted above, integrating AI and removing as much of the human contact component of the guest experience is going to be a good starting point. We can also expect a much heavier focus on staff and guest experience safety measures, such as UV light cleaning, protective gear for the workforce, and detailed rundowns of room cleanliness to satisfy anxious guests when they arrive. Consider the measures that were taken and assurances given to patrons in cities like New York when infestations of bed bugs were being reported. Now amplify those measures considerably to get a sense of what we can expect when properties begin reopening.

What long-term implications will the current crisis have on the industry and how it interacts with customers in your view? What will change for good?

One area of pushback that we've heard from clients in the hospitality space when it comes to implementing centralized AI and contactless systems is the cost of such an overhaul. It's been a fair justification for not making the switch for a long time. Granted, the benefits of these systems are significant in terms of both logistical improvements and long-term cost savings and guest lifetime value, but that's a hard sell to a property that is operating efficiently and profitably with the systems currently in place. Now that there seems to be no alternative for a lot of operators but to change, I think that's something that we can expect to see as a permanent changeover.

Padveen is set to discuss data driven experiences, on 13 May. [Click here](#) to add to your schedule of sessions you want to stream.

INTERVIEW

Making lemonade out of lemons in the time of the stranded gambler

Casino operators need to think strategically to survive the current Coronavirus crisis and create long-term viability, according to Bobby Soper, President and CEO of Sun Gaming and Hospitality.

The land-based industry in the U.S. is faced with the prospect of having many more losers than winners in the coming months, with missed forecasts, steep revenue decline and even cash bleeds stemming from closures.

Things might not get better quickly either, with the hammering of the nation's economy certain to have dented consumer confidence and damaged the spending power of casino patrons.

And yet, Soper believes those that have chosen – and are able – to invest in online operations will benefit the most, with their successes set to kick-start further legislative change in the near future.

He said: “When the dust clears, those operators with a strong balance sheet and more accommodating lenders will fare the best. But as history teaches us, the reality is that the current economic situation and consumer mood at the time of re-opening will dictate the response. We learned in 2001 and 2008 that bounce back may not be immediate.

“Upon re-opening, there will be changes that will impact demand, including of course social distancing and crowd control measures. The severity and extent of such measures will in large part be dependent upon the timing of the development and implementation of a vaccine to remove fears and help restore consumer confidence.

“While there are few published revenue numbers since closure, anecdotally, online gaming operators are enjoying a major surge in demand having been presented with the chance to monopolize share of wallet. For online operators that execute well during this time of the ‘stranded gambler’ it is an incredible opportunity to expose their product to new consumers who would not otherwise have tested it.

“For the long-term strategic thinkers, it can also be an opportunity to illustrate the importance of online gaming, and therefore catalyze efforts to expedite its legalization in jurisdictions where there is potentially enough support to do so. It not only shows the

importance of having a product that can be played remotely, but in order to preserve jobs, any such authorizing legislation should be tied to the land-based facility.

“To put it simply, while the negative short-term implications of Coronavirus will never be wholly mitigated, this is a time to make lemonade out of lemons through legislative change.”

For those that don't have an online gaming available in their armoury there are still reasons to be hopeful, provided they use this time wisely to engage with their customer base.

Whilst Soper accepts it is probably too risky to launch any large-scale campaigns given the uncertainty around physical capacity restraints when casinos do re-open, there is much that can be done.

He added: “Strategic management teams need to develop a portfolio of campaign options with appropriate incentives to drive business that can be immediately launched upon opening after assessment of initial volumes and within the context of current constraints.

“From a marketing perspective, those operators that do more now during the closure to incentivize their guests to revisit after re-opening will have a competitive advantage.

“Ultimately, the long-term health and survival of numerous gaming companies will depend on factors including how long it will take to rebound, and how permanent - and to what extent - behavior will have changed due to the pandemic. The good news is that there seems to be some help through direct government aid and, perhaps more importantly, a more thoughtful and accommodating approach by lenders compared to what we have seen in the past.”



Soper is set to discuss non-gaming entertainment, on 13 May. [Click here](#) to add to your schedule of sessions you want to stream.



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REPLACING THE ACTION

With almost all land-based venues shuttered and sporting action suspended, **Robin Harrison** looks at the options available for US operators as they attempt to retain and monetize their sportsbook customers

The US sports betting industry has been stopped dead in its tracks by the novel coronavirus pandemic. While the National Football League (NFL) is in its off-season, all other major US leagues have been suspended as a result of Covid-19.

Early on in the outbreak, Rush Street Interactive tried to put a brave slant on proceedings, claiming a significant uptick in betting on sports such as table tennis, Australian rules football and Belarusian soccer.

“With major events being postponed, we can really showcase our broad offering of sports around the world,” Rush Street Interactive operations chief Mattias Stetz said. “We have rugby, soccer in Hong Kong and basketball in Turkey, along with others.

“For any sports going on anywhere in the world, we try our best to have it.”

Within days, all of Australia’s major sports leagues followed their European counterparts in suspending fixtures until further notice. Fixture information provided to iGB North America by sports data specialist Abelson Info reveals that beyond soccer in diverse countries such as Belarus, Burundi and Tajikistan, as well as some semi-professional basketball in Asia, betting is largely restricted to Australian racing. Not that there are many places to bet on these sports today.

With all commercial casinos shuttered, and only small tribal gaming venues still open, it is almost

impossible to place an over-the-counter bet. For states with online wagering, the range of markets available aren’t the sort that can drive customer activity.

“It’s obviously a very difficult time for all businesses associated with the sports betting industry,” Keith O’Loughlin, senior vice president of sportsbook and platforms for Scientific Games’ SG Digital subsidiary, says. “There’s a very limited number of live events available for bettors to get involved with, which is having a significant impact on engagement.”

O’Loughlin says it’s “paramount” for the supplier to support its partners during the crisis.

“We’re sourcing and adding further content to our OpenSports offering during this time to provide operators with the relevant tools to keep engaging with their customer base.”

These measures appear to have had a limited impact on shoring up sports betting revenue. New Jersey saw sports revenue drop 58.4% in March, and Indiana’s monthly total declined 50.5%. While Pennsylvania benefitted from a high hold percentage to post a month-on-month revenue increase, handle was down 60.2%. Iowa also reported a month-on-month increase in revenue, though handle dropped 66.5%. The worst decline was seen in Mississippi, which saw sports betting revenue for March plummet 86.8% year-over-year.



↓ 45.4%

IN THE WEEK ENDED 14 MARCH, THE NATIONAL HOCKEY LEAGUE, NATIONAL BASKETBALL ASSOCIATION AND MAJOR LEAGUE SOCCER ALL POSTPONED THEIR SEASONS. HANDLE DECLINED TO \$4.6M, DOWN 45.4% COMPARED TO THE PRIOR WEEK.

West Virginia, which publishes weekly updates on its sports betting market's performance, reported a slowdown across retail and mobile channels in the week ended 14 March. That week, the National Hockey League, National Basketball Association and Major League Soccer all postponed their seasons. Handle declined to \$4.6m, down 45.4% compared to the prior week.

The following week to 21 March—with an executive order closing all casinos in the state on 18 March—it then fell to \$877,303. This comprised a \$852,845 contribution from mobile, before falling to \$731,866 the following week, when mobile betting was the only available option.

There will obviously be aberrations and differences in other state markets, but the trends seen in West Virginia are likely to be replicated in others. With fewer sports to bet on, and none of the most popular leagues, there is a significant drop-off in customer activity.

To an extent, this could be offset by activity around other sports, as well as betting on future events. William Hill, for example, has been regularly pushing betting on the NFL—due to return in September—and the rescheduled 2020 Masters in November.

But this leaves a period in which customers have no impetus to bet, not to mention few in-play markets.

What, then, can they bet on?

VIRTUALLY APPEALING

O'Loughlin says SG has seen a “surge” of interest in virtual sports and esports.

“These two verticals remain largely unaffected in the current climate and are proving to be a viable option for operators looking to boost their offering amid a live sports shutdown,” he explains.

“Virtuals have always been a reliable solution and now more than ever they're showing their worth. Improved graphics and a wider range of sports and markets ensure that these events are the next best thing to live matches.”

Virtuals, to some extent, may appear to offer a ready-made replacement for sports betting, in that these replicate the look and feel of a real sport, albeit underpinned by a random number generator (RNG). This effectively makes each game an extended slot spin, supported by graphics and a simulated match.

“The offer of 24-hour, uninterrupted play has proven to satisfy most punters on a daily basis and encouraged a strong shift from sports betting

to the virtual proposition,” says Steven Spartinos, chief executive of virtual sports specialist Kiron Interactive.

“There are betting opportunities every 60 to 90 seconds and customers can choose to place single and multiple bets on a vast portfolio of popular sports and bet markets, both online and in-shop,” he continues. “The advantages will only grow as the vertical develops, but perhaps most important in this current climate is that virtuals are safe and secure products that allow for good margins.”



In recent weeks, the Nevada Gaming Control Board has permitted wagering on virtual Nascar racing as it looks to mitigate the sporting suspensions. However, in European markets,

suppliers have noted an initial drop in activity, with the core virtuals customer being existing sports bettors that simply stopped betting after their usual gambling activity shut down. Activity, it should be noted, has since began to grow once again, and rapidly.

In Spartinos' view it's not a case of replacing sports betting in any way, but instead tapping into a new revenue stream for operators. After all, this is how virtuals in their current form came into existence. An outbreak of foot-and-mouth disease in the UK in 2001 led to the cancellation of that year's edition of the Cheltenham Festival horse racing event and prompted Inspired Entertainment to launch virtual racing to fill the gap in the sporting calendar.

Yet since then, virtuals have remained an ancillary, rather than core, product in an operator's portfolio. And Spartinos admits that it remains uncertain whether this (hopefully) short-term Covid-19 enforced change in customer behavior will have a long-term impact in betting activity once sporting fixtures resume and betting activity reopens.

“Alternative content will by no means completely balance out the declining revenues from sports betting, but it does provide a tool by which to limit the forecasted damage,” he says. “For many operators, virtual content is now front and center of their offering, encouraging a sharp uptake of the mainstay games of horse racing, greyhounds and football.

“The increased emphasis is expected to spark greater growth of the vertical to encompass a more diversified offering that has wider appeal. At this time, some will ask if operators have the infrastructure to cope with increasing volumes, and it is important to work with partners to expand capacity.”

ESPORTS EMERGES

As part of this more diversified offering, it appears that esports has an opportunity to emerge and establish itself as a core product. While a big part of its appeal has been LAN-based events, competitors can still do battle online, meaning its schedule of matches and tournaments has not ground to a halt in the same way as traditional sports.

It already attracts huge audiences—of up to 60 million people according to Ultraplay chief executive Mario Ovcharov—and is increasingly featured alongside traditional sports in operators’ portfolios.

O’Loughlin notes that esports betting has grown “exponentially” in recent weeks.

“It’s a fascinating development given how the vertical’s potential has been talked about for years,” he says. “It appears now is the time that players are familiarizing themselves with the concept of betting on competitions between gamers.

Mark Balch, head of product and partnerships for Bayes Esports Solutions, a joint venture between Sportradar and esports solutions provider Bayes Holding, says the business is looking to ramp up coverage to fill the void left by traditional sports.

“With more people at home, there has been a noticeable increase in day-to-day esports events overall,” Balch says. “There are more unplanned tournaments and opportunities for us to provide the corresponding data to our customers.”

Traditional sports clubs have been quick to jump on esports, with competitions between players on console titles such as FIFA in Europe, and NBA2K in the US. An NBA2K tournament, in which players

from a number of National Basketball Association franchises will compete against one another, is even airing on ESPN.

Free-to-play (F2P) sports contest provider SportCaller has already looked to tap into this event with a bracket predictor game, launched for the GVC-MGM Resorts joint venture Roar Digital’s BetMGM brand. A proposition betting game has also been rolled out with FanDuel.

This continues a range of F2P contests run for partners such as Kindred Group and FanDuel over the past year.

“Primarily, those experiences came via first-person shooters such as Quake and CS:GO, but no doubt the use of sport events for our prediction games is driving a significant surge,” SportCaller managing director Cillian Barry says. “In fact, with many of our clients now using our question-based templates to create and run such games, esports evangelists are being fashioned from some once-cagey audiences!

“It’s an emerging trend on which we plan to capitalize.”

But to add the betting element means an additional layer of complication, Balch warns. First, there is the issue of legality in the US. New Jersey currently only allows operators to accept bets on esports competitions with approval from the Division of Gaming Enforcement on a case-by-case basis.

A bill to add esports to the approved sportsbook markets was filed by Representative Ralph Caputo in January but only passed the Assembly Tourism, Gaming and the Arts Committee on 5 March. In Nevada, the Gaming Control Board is steadily approving betting on more competitions, but again on a case-by-case basis.

Furthermore, Balch adds, Bayes must make sure the competitions it covers are legitimate, and don’t pose integrity threats to its operator clients.

“So, in a situation like this, where you have a lot of newcomers involved, it’s paramount for us to conduct in-depth research constantly to ensure the data we’re providing is impeccable,” he says.

Furthermore, while at least a percentage of the (up



“ESPORTS AND VIRTUALS REMAIN LARGELY UNAFFECTED IN THE CURRENT CLIMATE AND ARE PROVING TO BE A VIABLE OPTION FOR OPERATORS LOOKING TO BOOST THEIR OFFERING AMID A LIVE SPORTS SHUTDOWN”

KEITH O’LOUGHLIN, SG DIGITAL

to 60 million-strong) esports audience placing a bet may boost revenue, it is unclear how neatly this audience converts to real-money wagering.

“There are a number of factors that have contributed to the spike of esports betting and it is hard to know which is having greater effect, and which will last,” Balch says. “The huge interest for FIFA and other sport simulations are likely not to continue after the Covid-19 crisis, but we will not know the full impact for some time.

“However, what is clear, is that the majority of traditional sports betting activity has not suddenly shifted to esports games like CS:GO or League of Legends,” he adds. “Most are simply abstaining.”

SOCIALLY VIABLE

If, as Balch says, players are simply not betting on new sports such as esports, the challenge shifts to one of finding ways to engage and retain these customers. This is at the core of what SportCaller does, as digital performance director Paddy McDermott says later on in this issue. This of course becomes a lot more difficult without any live sports to drive customer activity around.

Barry says that as a result of the sporting suspensions, the supplier has been transitioning clients to a new wave of free-to-play games and quizzes that do not rely on live sports.

“Instead of users making predictions on, say, Saturday’s football, they are instead testing their knowledge on seasons past—challenging friends, battling for bragging rights and winning prizes along the way,” he explains. “These products are helping our clients to engage, retain and even add to their base during an otherwise unsettling and unpredictable period.”

This is supported by an existing range of question-based games, which can be tailored to any sport. This could be on the history of the English Premier League, or past editions of the National Collegiate Athletics Association (NCAA) March Madness tournament.

“Interestingly, some operators are tactically matching their quiz games to the seasonal cycle of now-postponed sporting tentpoles (for example, April’s Masters golf). This strategy makes for astute fill-the-void substitution.”

This has a secondary role, as a socially responsible way to engage and retain players without demanding additional spend. These games, he continues “provide a welcome break from the current stresses of modern life with a fun and compelling challenge that never asks players to

fund their accounts.”

“Instead, operators can elevate engagement and brand loyalty even when their customers are disconnected from sports betting, so that when the sporting calendar does recommence, their users will follow,” Barry says.

“Now more than ever, it’s crucial to employ a lighter marketing touch which promotes fun and online hangtime, retaining players without cross-selling them into other casino products in which they had traditionally demonstrated little interest.”

Barry’s final point does raise the question: how much is online casino benefiting from the sporting shutdown? As O’Loughlin points out, players that traditionally bet on sports will still be looking for some form of real-money entertainment, and online casino could become an attractive proposition to these players.

Of course, actually ascertaining whether or not casino has benefitted during the suspension of sports is difficult with the few states that offer igaming having yet to publish their results. One operator, speaking off the record, suggested that there had certainly been a significant positive impact.

Customer acquisition had soared, they said, with customer deposits up by a fifth, and revenue by around 30%. While affiliates, with businesses covering a broad array of markets around the world, are not necessarily indicative of US trends, they have largely avoided too significant an impact, with the bulk of revenue coming from online casino.

Last year New Jersey’s online casino and poker revenue reached \$482.7m, a 61.6% improvement on 2018. With these games the only products unaffected by the pandemic, this could conceivably jump significantly in 2020 as customers shift to the new verticals. New Jersey’s online casino market saw revenue grow 64.8% year-on-year in March, to \$64.8m, while Pennsylvania reported slower growth, with revenue up 24.5% to \$24.3m.

Yet it’s worth noting that currently only New Jersey, Pennsylvania and Delaware offer online casino. West Virginia passed legislation, but progress towards opening the market appears to have ground to a halt. Michigan will join the fray, and is currently targeting a launch early next year.

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BMM's world headquarters are in Las Vegas (USA), with offices in Mexico City (Mexico), Lima (Peru), Melbourne and Sydney (Australia), Singapore, Macau (SAR, China), Moncton (Canada), Buenos Aires (Argentina), Barcelona (Spain), Vienna (Austria), Bologna (Italy) and Midrand (South Africa). BMM employs some 300 people in 13 global locations and serves over 440 jurisdictions.

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Peerplays, known as the gaming blockchain, is the first decentralized global gaming platform, disrupting the global gaming industry with a new paradigm of fairness, transparency, speed, and security.

For more information, please visit: www.peerplays.com and www.pbsa.info



Peerplays RNG

Peerplays Blockchain Standards Association Introduces New Random Number Generator

Peerplays Blockchain Standards Association (PBSA), the first decentralized global gaming platform, has introduced a next generation Random Number Generator in an effort to bring provable fairness to blockchain-based gaming. The new system will allow both players and operators to verify the randomness of spins, actions and games, providing confidence in the integrity of the gaming experience. It can be integrated into virtually any online gaming product, including blockchain and non-blockchain based applications.

The product utilises the latest blockchain technology to ensure complete and provable randomness, which is achieved by a distributed ledger interface that generates and stores random numbers on the blockchain. Designed in conjunction with leading testing lab GLI, it goes beyond traditional RNGs by verifying all actions in the blockchain, meaning players, operators and regulators can validate the randomness of a transaction for real-time proof whenever it is required or desired. The association believes that nobody should be denied access to this information.

A spokesperson says it was designed because trusting randomness in private code simply wasn't good enough to meet the expectations

of today's generation of gamers and they are now confident it is ready for use in North America and beyond.

They added: "At a time when the online gaming industry is facing something of a trust problem, our RNG can deliver verifiable randomness designed to show players and operators that games are fair. For too long, random number generation has been considered something of an afterthought by games suppliers. Peerplays RNG delivers a next generation RNG with added functionality that can bring incremental benefits to games suppliers, operators and their customers.

"We have already received considerable interest in the product from game developers who believe like we do that verifiable, trustworthy solutions in games are what players deserve. The first of these innovators will be announcing their partnership in the coming weeks.

Peerplays RNG uses graphene-based blockchain technology to generate a random number from secret hashes. This technology guarantees provable randomness that can be verified in real time. PBSA, which is registered under Canada's Not-for-Profit Corporations Act, was set up to promote provably fair gaming standards for the peerplays blockchain by supporting development and related infrastructure for its benefit.

To find out more,
please visit **www.pbsa.info**
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Clarion Gaming has teamed up with the Mississippi Gaming and Hospitality Association to merge the Southern Gaming Summit (SGS), the premier casino industry conference and convention for the South, with its upcoming ICE North America event.

The collaboration will bring together delegates from all corners of the industry, combining our strong heritage in the land-based and hospitality sectors with the ICE brands' affiliation with sports betting and iGaming.

www.icenorthamerica.com

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The Mississippi Gaming and Hospitality Association (MGHA) is a non-profit organization whose mission is to protect and enhance the reputation and success of the gaming industry within the State of Mississippi. We seek to accomplish our mission by:

- Cooperating with government officials in advancing the gaming industry's common goals and objectives;
- Promoting comprehensive and fair regulation of the gaming industry to insure integrity at all levels of operation;
- Advocating fair and reasonable taxation of the industry, which will permit operators to maximize employment opportunities and re-invest, expand and improve existing facilities
- Promoting and participating in public education throughout Mississippi regarding the benefits of casino gaming, including job creation, economic development and how the industry can help the State in maximizing its tax revenues; and
- Supporting and enhancing responsible gaming programs and offering education and assistance to individuals with gambling problems

The MGHA was chartered in 1993 and works in cooperation with the American Gaming Association headquartered in Washington, D.C.

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Represent the interests of entrepreneurs in the entertainment industry, before various groups to become a qualified spokesperson to disclose the virtues and benefits generated by this sector of the economy, as a generator of employment and important taxpayer of the federal treasury.

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www.aieja.org.mx

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Incorporated in 1985, National Indian Gaming Association (NIGA) is an inter-tribal association of federally recognized Indian Tribes united with the mission of protecting and preserving tribal sovereignty and the ability of Tribes to attain economic self-sufficiency through gaming and other forms of economic development. The common commitment and purpose of NIGA is to advance the lives of Indian peoples economically, socially, and politically. NIGA operates as an educational, legislative, and public policy resource for tribal policy makers as well as the public, on issues related to Indian gaming and tribal community development.

Located on Capitol Hill, NIGA is a leading voice for Indian Country, working diligently to ensure that the special status of tribes is recognized and protected when issues affecting tribal sovereignty arise. NIGA advocates on behalf of Indian tribes with Congress, the White House and federal agencies. In order to accomplish its mission, NIGA often works with Congress and the administration on all Indian Issues under the Commerce Clause.

NIGA completed an expansion of the original building in 2015. The Stanley R. Crooks Tribal Leader Conference Center and a multi-story connection between the historic main house and revolutionary era carriage house structures, transformed NIGA's headquarters from primarily office space to a prime conference-meeting center for legislative activities on Capitol Hill.

www.indiangaming.org

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CANADIAN GAMING ASSOCIATION (CGA)



The Canadian Gaming Association (CGA) is a national trade association that works to advance the evolution of Canada's gaming industry. The association's mandate is to promote the economic value of gaming in Canada; use research, innovation, and best practices to help the industry advance; and create productive dialogue among stakeholders.

The association is committed to helping stimulate innovation in the gaming industry by creating opportunities to showcase, promote and advance new products and ideas, both in Canada and worldwide.

The CGA represents an inclusive and diverse membership and our goal is to create alliances with operators, manufacturers, lottery corporations, regulators, and other industry associations to encourage joint participation to advance issues of common cause. Today, CGA works to accomplish for the Canadian gaming industry what individual members can't achieve on their own. More information on joining the CGA as well as membership fees and application forms are available at canadiangaming.ca.

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ORGANIZATIONAL VALUES

- Integrity
- Constant improvement
- Proactivity

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www.fecoljuegos.com.co

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NCLGS



The National Council of Legislators from Gaming States (NCLGS) is the only organization of state lawmakers that meets on a regular basis to discuss issues in regard to gaming. Members of NCLGS chair or are members of committees responsible for the regulation of gaming in their state legislative houses. NCLGS does not promote or oppose gaming but is primarily concerned with the proper regulation of the industry.

NCLGS is a proactive participant in educating legislators on gaming issues, in the development of public policy related to state-authorized gaming, and, where consensus exists, in representing the states before Congress and the executive branch of the federal government on states' rights issues relating to gaming.

NCLGS is structured to include committees on lotteries; pari-mutuels; casinos; responsible gaming; and state-federal relations focusing on Indian gaming issues, and telephone & internet wagering.

NCLGS meetings provide information on cutting edge gaming issues that legislators need to know. NCLGS programs include balanced panel presentations that offer opposing views.

The NCLGS Foundation is the educational and research arm of NCLGS. The 501(c)(3) non-profit is a source of non-partisan data on issues of gaming legislation and regulation.

Spectrum Gaming Group serves as Executive Director of NCLGS.

www.nclgs.org

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FSGA



The Fantasy Sports & Gaming Association is recognized as an exempt 501(c)(6) organization by the IRS.

Our Mission

To support fantasy sports, sports gaming, and new forms of fan engagement.

Our Vision

Connecting fans to the sports they love.

Our Values

- Pro-business: the support of an environment that is good for business development
- Embrace Innovation: to welcome new and novel ideas
- Future-focused: to set long-range goals that fuel today's decisions and actions
- Support Legal Game Play: the encouragement of lawful participation in sports gaming
- Consumer Protection: dedicated to protection of our customers

Our Legislative Agenda

The FSGA measures all fantasy legislation by 3 core principles.

- Fantasy sports is a game of skill and should not be confused with gambling
- Basic consumer protections that are free of substantial regulatory burdens
- Fee structures (licensing, renewals, taxes) that are affordable for operators of all sizes

With the addition of "sports gaming" being added to our core focus in 2019, the FSGA considers the legislative splitting of fantasy sports from sports betting its key area of focus, encouraging the two product-offerings to be clearly defined and separate from one another. We also encourage the allowance of digital (non-land-based) gaming platforms that allow people to play on fantasy sports or sports betting platforms wherever they desire, outside a physical location. To learn more about our legislative agenda and to track our efforts, speak with someone from our legislative affairs committee.

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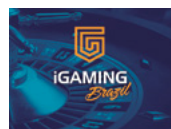
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