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Day 2 • May 12, 2020

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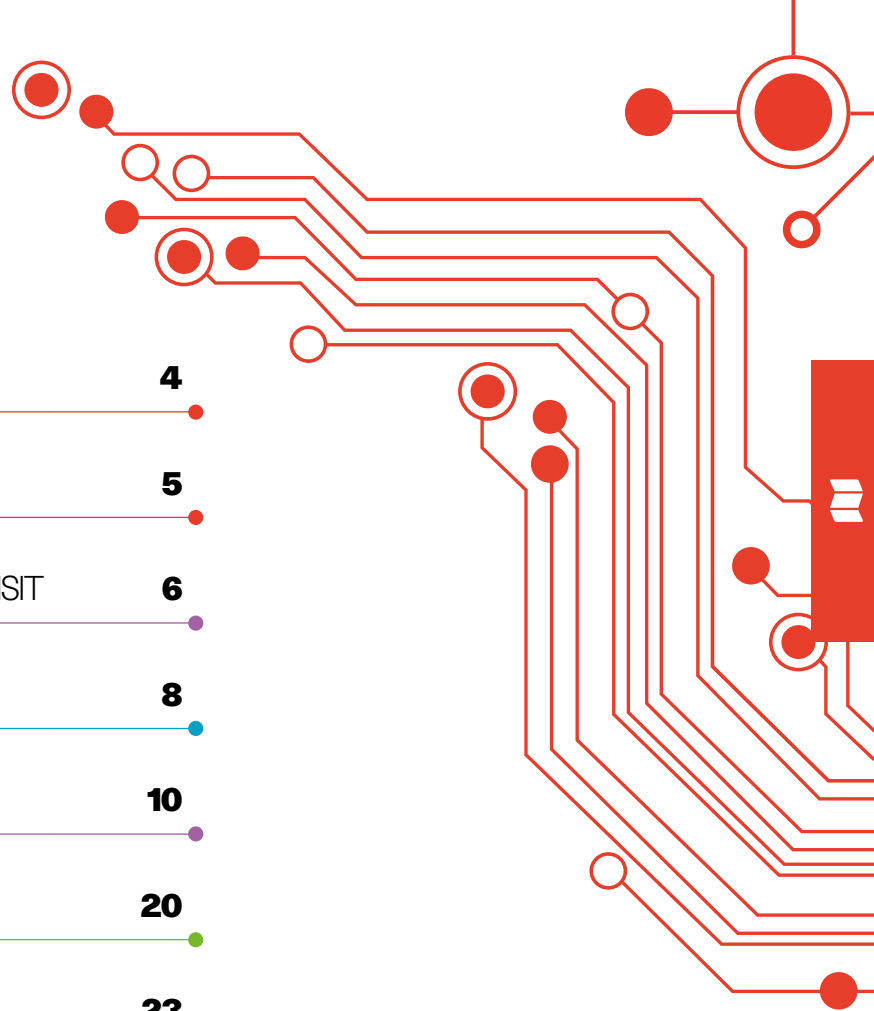
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WELCOME

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.

We have over a three-thousand people signed up from all areas of the industry, including land-based, online, sportsbook, lottery, casino and hospitality technology. There's 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.

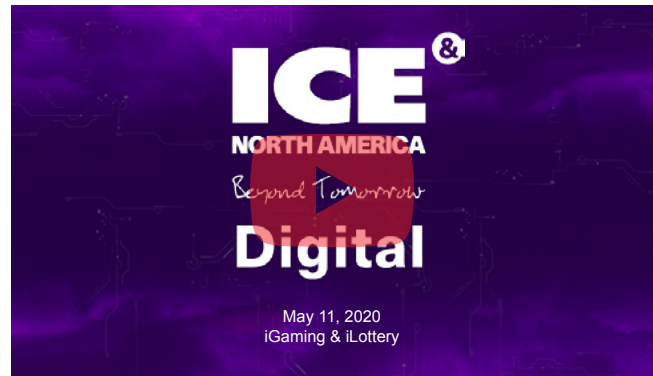
Aviram was the first to contribute, indicating that growth in online players, many of whom were existing land-based customers making the switch, was very positive for the industry. He was hopeful the statistics would encourage states and land-based only operators to understand the value of having a diverse 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](#).

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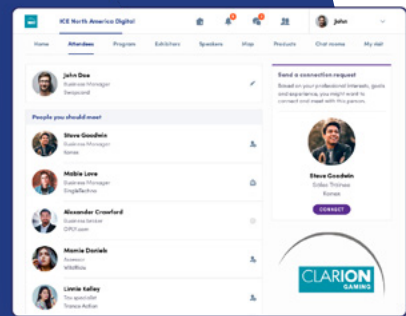
Begin connecting with your peers, customizing your program and scheduling one-on-one video meetings ahead of the live event.

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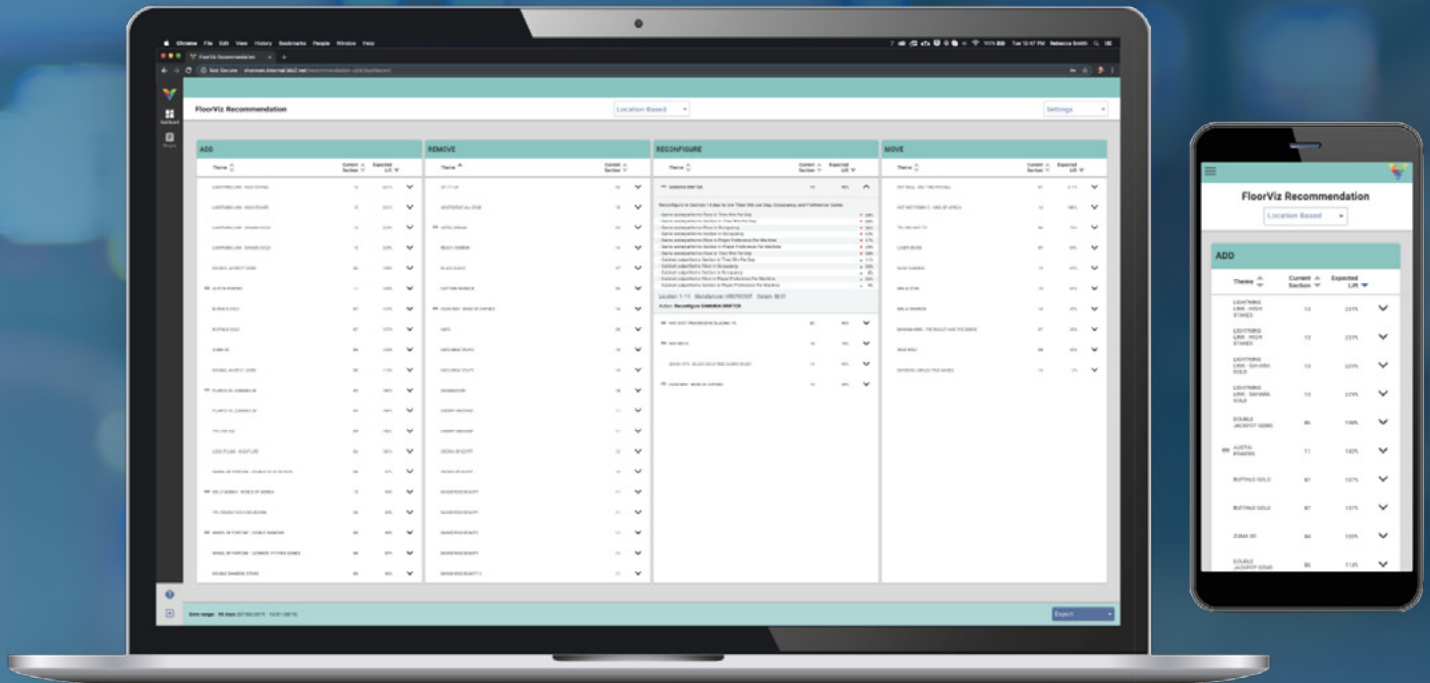


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AGENDA



TUESDAY, MAY 12 – SPORTS BETTING AND PERFORMANCE MARKETING

Track Sponsor
- Sports Betting



4:30PM

WELCOME

Hosted by:



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



Victor Rocha, Conference Chair, National Indian Gaming Association and President, Victor Strategies

EXPOSE – SENIOR LEGISLATORS AND REGULATORS ANSWER WHAT COVID-19 MEANS FOR SPORTS BETTING AND GAMBLING REGULATIONS IN THE US

- What legislators are active now and able to pass bills?
- What legislators will be active in the fall
- What legislators have budgetary sessions that would allow for gaming regulation?



Christopher Hebert, Gaming Division Director, Louisiana Attorney General's Office



State Representative Brandt Iden, Michigan



Sandra Douglass Morgan, Chairwoman, Nevada Gaming Control Board



Michael Pollock, Managing Director, Spectrum Gaming Group

Followed by Q&A

[REGISTER FOR THE SESSION](#)

4:55PM

QUICK TAKE ON: GAMING IN CANADA – RE-OPENING AND LOOKING AHEAD AT REGULATORY DEVELOPMENTS



Paul Burns, President & CEO, Canadian Gaming Association

EXPOSE – THE KENTUCKY DERBY, GRAND NATIONAL AND ENASCAR SERIES – WHAT CAN VIRTUALS AND ESPORTS OFFER THE INDUSTRY?

Following the suspension of mainstream sports around the world, there has been a well-publicised uptake in virtual products and esports betting. This expose will focus on how headline sporting events have adapted since isolations around the world began focusing on the virtual versions of the UK's Grand National and the world famous Kentucky Derby, as well as the 2020 eNASCAR iRacing Pro Invitational Series. This session will look at whether these successes will truly take virtuals and esports to the betting mainstream.



Scott Warfield, Managing Director, Gaming, NASCAR



Steve Rogers, Chief Commercial Officer – Virtuals, Inspired Entertainment


Followed by Q&A

[REGISTER FOR THE SESSION](#)

AGENDA TUESDAY, MAY 12 – SPORTS BETTING AND PERFORMANCE MARKETING

Track Sponsor
- Sports Betting



 5:15PM

QUICK TAKE ON: HOW CAN OPERATORS DELIVER ENTERTAINMENT FOR THEIR CUSTOMERS WITHOUT LIVE SPORTS?

With the exception of a few niche leagues and competitions, live sports have ground to a halt around the world reaping havoc on sportsbooks everywhere. This session will explore how operators can take advantage of innovative and non-traditional sports products to meet customer demand.



Keith McDonnell, CEO, KMiGaming

EXPERT OPINION – HOW WILL 2020 DISRUPTION IMPACT THE MOMENTUM OF SPORTS BETTING'S ROLL OUT?

- Are the early movers still the winners?
- Will we see a market shakeout to come?
- 2 years on from PASPA, what are the key learnings and what does the future hold?



Moderator: Dr Laila Mintas, Advisor and C-Level Executive, Mintas Consulting



Seth Young, Chief Information Officer, PointsBet




Kresimir Spajic, SVP & MD, Online Gaming and Sports Betting, Hard Rock International



Bill Anderson, VP Commercial – Americas, BetGenius

Followed by Q&A

 REGISTER FOR THE SESSION

 5.45PM

EXPOSE – CAPTURING EYEBALLS AND MARKET SHARE - AN OPPORTUNITY FOR PERFORMANCE MARKETERS?

- Providing customers with news beyond COVID-19 – Why now is the chance to provide credible and gripping news reporting to build brand recognition
- Varying content in the absence of live sporting events
- Exploring opportunities in new states like Michigan, Tennessee and Colorado




Michael Daly, General Manager – US, Catena Media



Daniel Kustelski, Co-Founder and CEO, Chalkline Sports

 REGISTER FOR THE SESSION

 6.15PM

HOST WRAP-UP AND CLOSE DAY 2



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



Victor Rocha, Conference Chair, National Indian Gaming Association and President, Victor Strategies

INTERVIEW

Future is bright – and mobile – in spite of society’s struggles, says Kustelski

U.S. betting and gaming will re-surface from the current Covid19 crisis stronger than ever and having taken a ‘hard shift’ towards mobile and online, according to Daniel Kustelski, CEO and co-founder Chalkline Sports.

With land-based casinos closed and the country’s nascent online sportsbooks betting on emergency rations having been starved of live sport, the industry faces an unprecedented challenge.

And yet Kustelski is backing his fellow operators and suppliers to weather the storm and use it to their advantage when it comes to the progress of legislation.

He also believes it will power a renewed drive towards online and mobile-based wagering which will have far-reaching implications for all concerned.

He said: “I know that we are in for some rough days ahead, but we will emerge stronger than before. I believe that there will be a material change to the gaming industry, with a hard shift to towards online and mobile.

“With much of our team having come from a land-based casino group, we’re acutely aware of the challenges that lay ahead. But I’d suggest that online and mobile options will be table stakes for any gaming bill in any state that has not yet regulated, and states with regulated gaming options will face pressure to open-up mobile quickly.

“There will undoubtedly be small delays in legislative sessions, but overall, this will drive the industry forward. States will need revenues, the industry can provide jobs, and sports fans are going to find ways to engage with their favourite sports, teams and players.”

Chalkline Sports offer mobile and personalised live-odds competitions that engage sports bettors of all experience levels. In the absence of most live sports in recent weeks they have run a series of free play games, including horseracing, Tom Brady’s free agency, and NBA 2k Players’ tournament.

He is also convinced that now is not the time for operators to quit their marketing efforts, despite sensitivities around the impact of the global pandemic.

He said: “The opportunity for you AND your

customers is different from what it was even one month ago, but sports fans crave distractions now more than ever, and when you work in sports betting, your job is to provide people with the engagement they love.

“We’ve always loved the Jeff Bezos quote about engaging with the end user: ‘the most important single thing is to focus obsessively on the customer. Companies that have built a strong and authentic relationship with customers will find ways to communicate with them.

“Today is your company’s opportunity to tap into the seeds you’ve planted in the past and have an authentic conversation with your customers, even in the worst times.”

Kustelski believes those times will be made a whole lot better with the help of one of the industry’s leading bodies. He added: “One thing cannot be overstated: the strength of the American Gaming Association, and what they can do to help the industry. From the days of Frank Fahrenkopf and Jim Murren, to Tim Wilmott, Trevor Croker and Bill Miller - the AGA will get us back on track.”

Kustelski is set to discuss capturing eyeballs and market share, on 12 May. [Click here](#) to add to your schedule of sessions you want to stream.



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INTERVIEW

Golden future awaits a thoughtful approach

Online sports betting will provide dollar-hungry states with a ready-made revenue stream when the Coronavirus pandemic dies down, according to Brandt Iden – but they must be careful not to kill the golden goose.

After four years of intense efforts, State Representative Iden successfully passed legislation legalizing sports betting and iGaming in December 2019 and now hopes regulators will have operators approved by the end of this year.



He believes that its successful implementation in the Great Lakes State will now encourage others to speed up the modernization of their own legislation, particularly when live sports return, not least because of the fiscal benefits the move would bring.

But he warns that the clamour for cash should not blind lawmakers to the very real need for a competitive tax rate and a sensible regulatory framework to prevent the move being strangled at birth.

He said: “People are itching for sports to come back as there is not a lot on the television. We have a glimmer of hope with the PGA this summer and football and soccer in the autumn, and there will be a lot of pent up demand to bet on those sports.

“There will also be demand for revenues from states looking to get back on their feet as budgets will have taken a major hit. The temptation is to impose high taxes on industries like betting and gaming, but they need to be very cautious that they don’t kill the golden goose.

“Sports betting is about small margins and we need to support them with low entry fees and low taxation, otherwise operators will not participate. As a result, bettors will continue to bet on the black market – which does much more harm than good to them and the industry.”

Iden, who will be speaking at the forthcoming ICE North America Digital conference, highlights Virginia’s recent decision to enact sports betting into law from July 1st as an example of the potential pitfalls.

Whilst welcoming the legislation, he believes the sizable licensing fees, level of taxation and, in particular, background check costs for each principal, which could affect up to 20 employees at some companies, could prevent participation by all but the biggest concerns in the market.

He added: “Personally, I think 15% tax rate is too high, but fees of \$50,000 for background checks are just prohibitive. You cannot kill these companies with

fees and taxes as their offering will just not be competitive.

“I get why they did it, but states have to ask themselves does this make sense and is it practical? The same can be said for not allowing Virginians to bet on their university teams when those sports are up and running.

“They will just go over the border to West Virginia or continue using their illegal bookmaker. States need to be thoughtful about how they introduce legislation and then maintain it – otherwise they will continue to drive it underground.”

Iden is set to discuss sports betting and gambling regulation in the US, on 12 May. [Click here](#) to add to your schedule of sessions you want to stream.

INTERVIEW

Shaping the narrative: how affiliates are responding to COVID-19

Just as the closures of land-based casinos and cancellations of sporting events have instigated dramatic changes in the betting sector, the U.S.' nascent affiliate market has had to quickly adapt to a new and remarkable environment caused by the ongoing COVID-19 crisis, according to Michael Daly, Vice President North America at Catena Media.

As part of the gaming media, affiliates play a crucial role in shaping the narrative around the outbreak. Daly, who has over 15 years' experience in the industry, says that there are topics where affiliates in their position as a news source can add value to the conversation, but called for care in how and when they add to the coverage.

"While the main media is focused on Coronavirus' impact on a global and national scale, our sites like PlayPennsylvania.com can be helpful reporting on things like the status of benefits for land-based casino workers in the state, or programs available to assist the industry," he said. "These we think are stories that are credible, engaging and overlooked in many other media sources."

He also believes it is an affiliate's responsibility to keep consumers informed in this fast-changing landscape with accurate information. With retail betting locations shut for the foreseeable future, more customers are looking to find out how and where they can bet on sports or gamble online.

"That is our expertise and whether traffic is decreased due to sports events cancelling or increasing due to land-based options being unavailable, our function continues to be to provide the absolute best source of news and information to accurately inform that consumer," he said.

The COVID-19 outbreak has instigated a well-reported spike in alternative content, from betting on lesser known sports such as table tennis and lower league hockey to events such as e-sports and virtuals. Daly said that based on search volumes, that increased interest has also been reflected among readers.

"Beyond the traditional sports (or non-traditional) we are seeing a rising of interest level, by both



consumers and operators, in things like e-sports and virtual sports, both of which were relegated to corners prior," he said. "This is great for exposure of these burgeoning industries, both of which I would argue will have a seat at the table in the future world of what we think of as 'sports.'"

On whether the disruption caused by COVID-19 has impacted development of U.S. state markets, particularly those like Michigan, Tennessee and Colorado that were on the cusp of legalisation, he added: "Priorities for everyone had to shift. The world had to shift. And, thankfully, we all stepped up and focussed on the most important things.

"These markets will come, some a little later than originally anticipated, but they will come. The world will come blazing back. People will want to try to go back to 'normal' and definitely will want sports and sports betting as much as they did before."

He is also convinced that in the current state of play, now is the time for corporate citizenship to come to the fore and brand recognition to take a back seat.

"This is the time for companies to step-up and help however they can, regardless of whether they get recognition for it today," he added. "The media will pick up some on this as will other forms of information sharing (Facebook, Instagram, etc) and brands will be remembered for what they did or did not do."

Daly is set to discuss sports betting and gambling regulation in the US, on 12 May. [Click here](#) to add to your schedule of sessions you want to stream.

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INTERVIEW

Why eNASCAR's 15 minutes of fame will lead to long-term success

On May 16th, NASCAR postponed all forthcoming races in its Cup series until early May, leaving a primetime hole in the scheduling program of Fox Sports 1.

The following day, it announced the creation of eNASCAR Pro Invitational in collaboration with long-term partner iRacing - a new gaming league where professional athletes would battle it out on virtual tracks to fill the broadcasting void. What happened next was quite remarkable.

The first race at virtual Homestead-Miami Speedway attracted 900,000 viewers - smashing ratings records for any other televised esports competition - and trended number one on Twitter. Over the following four events numbers steadily increased to over 1.5 million.

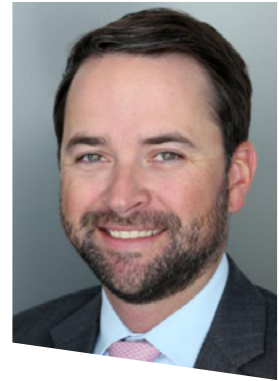
Scott Warfield, Managing Director of Gaming at NASCAR, believes that the series has given an opportunity to show the world what esports can be from both a sports entertainment perspective and as a betting opportunity.

"Postponing the live events was a jarring inevitability and something that all sports leagues have had to deal with - basically taking away a form of entertainment from our fans," he said.

"Luckily, we were able to quickly pivot to our esports strategy. iRacing has been a partner of ours for 11 years, so we knew through our collaborative Coca Cola e-series and Heat Pro league for video consoles that we had a fantastic product which would keep fans engaged in the absence of NASCAR Cup races."

Although the figures for Pro Invitational are significantly lower than the NASCAR Cup average, which would typically receive around 4 - 4.5 million viewers, the virtual series' races now make up the five highest rated televised esports events in U.S. history. And it has chartered new territory too: over 25 percent of viewers of the Miami competition had not watched any other previous NASCAR event this year.

Warfield said: "A lot of the positive reaction is because the iRacing product is so real. For each virtual event we've looked to recreate every component of the real-life equivalent, from the pre-race concert to bringing in the professional NASCAR Cup drivers and following the original track schedule."



High tides lift all boats

Many athletes already used and promoted the driving simulator rigs as a training and engagement tool, affording a level of credibility to the platform that has helped boost ratings.

Thanks to this sudden surge in popularity, Warfield believes NASCARS' two existing esports mainstays - Coca Cola and Heat Pro - will see long term gains.

He said: "The numbers for our existing leagues have gone through the roof - but will this stick around? Before the coronavirus pandemic, esports was already on an incredible trajectory. That curve has now been accelerated as sports like eNASCAR have been given 15 minutes of fame."

For the betting industry, esports has provided a lifeline to many sportsbook operators by filling the void left by the suspension of most major leagues and sporting events. But as well as maintaining engagement among traditional bettors, the increased prominence of esports is also attracting a younger audience.

"There are sports fans all over the world that are thirsting for content and the same can be said for bettors. If you look at what's been popping with sportsbooks, it's ping pong, it's Belarus football, it's Korean baseball - and now there's this peak of interest in eNASCAR because of the realistic nature," Warfield explained.

"The benefit we have is that our esports products are available on platforms where a lot of younger people flock to and are broadcast in more attractive, shorter formats. So, while we're trying to capture any and all eyeballs, an additional element is that as the sports become more youthful, so will the operator's sportsbooks."

As the popularity of betting on esports propels into untested waters, Warfield asserted that integrity remains critical. He emphasised the importance of clarity with the audience and ensuring an understanding of the event rules.

Warfield is set to discuss the he benefits of esports to the betting and gaming industry, on 12 May. [Click here](#) add to your schedule of sessions you want to stream.

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 esports 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.”

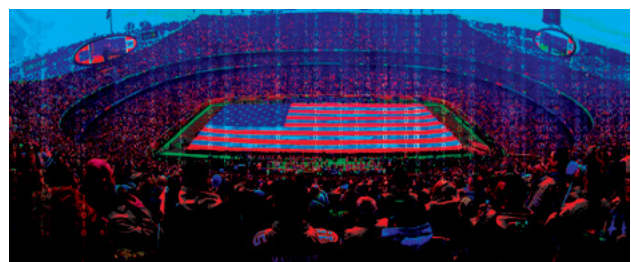
Barry’s final point does raise the question: how much is online casino benefiting from the sporting shutdown? As O’Loughlin points out, players that traditionally bet on sports will still be looking for some form of real-money entertainment, and online casino could become an attractive proposition to 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 gaming 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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Convergence Strategy Group brings together minds that have guided some of the most successful developments in the world. Formed as a partnership between Scott Fisher, Ph.D. and Suzanne Perilloux Leckert, AICP, the New Orleans-based consulting firm draws from a collective 35+ years of experience providing analytical and strategic planning services to gaming, leisure, commercial, tribal and public development partners.

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The Peerplays blockchain is supported by the Peerplays Blockchain Standards Association (PBSA), which is registered under the Canada Not-for-Profit Corporations Act, promoting provably fair gaming standards for the Peerplays blockchain by supporting development and related infrastructure for its benefit.

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.

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www.aieja.org.mx

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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.

canadiangaming.ca

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MISSISSIPPI GAMING AND HOSPITALITY ASSOCIATION (MGHA)



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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NATIONAL INDIAN GAMING ASSOCIATION (NIGA)



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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ORGANIZATIONAL VALUES

- Integrity
- Constant improvement
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The Colombian Federation of Businessmen of Games of Luck and Chance - Fecoljuegos founded in the year 2000, is a non-profit and trade association entity made up of operators, manufacturers and affiliated operators from all over the country, which aims to ensure the interests of the entrepreneurs of this industry.

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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For more information, visit our website: **[TotallyGamingAcademy.com](https://www.TotallyGamingAcademy.com)**

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