



Moving Forward: iGaming in the Covid-19 Era

May 14, 2020

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Thank you for your participation



Thank you to our webinar producers



Next in our
webinar series:

Design Changes:
What Will a
Casino Resort
Look Like in the
Wake of Covid-19

- Thursday May 28 at 2:00 p.m. EST
 - 11:00 a.m. PST
- Moderated by:
 - Michael Soll, President, The Innovation Group
- Speakers Coming Soon!
- You can register for the webinar at www.casinowebinar.com



Digital Networking Event

PASPA repeal: A networking event marking the 2nd anniversary of the monumental supreme court ruling

May 14, 2020

3:00 PM Eastern (*immediately after this webinar*)

SBC invites all our industry friends to a special Zoom networking event to celebrate the decision and discuss where our industry is now and where it is going. A number of key individuals from the court case will be joining the event as special guests.

You can register here: <https://hubs.ly/H0qstjy0>

To help facilitate efficiency and respect your time, all participants will be on mute during the duration of the event. If at any time you'd like to submit a question, you may type it in the "Questions" box on the right side of your screen and - should time permit - we will answer them at the end of today's presentation. Please note that today's presentation will be recorded. The recording will be shared with all attendees after the webinar has concluded. A copy of the recording will also be made available at www.casinowebinar.com .

Today's Moderator



Roger Gros

*Publisher, Global Gaming
Business Magazine*

Roger Gros is publisher of *Global Gaming Business*, the industry's leading gaming trade publication, and all its related publications. Prior to joining Global Gaming Business, Gros was president of Inlet Communications, an independent consulting firm, and owner of iGamingPlayer.com, an affiliate marketing site for online gaming. He was vice president of Casino Journal Publishing Group from 1984-2000, and held virtually every editorial title during his tenure. Gros was editor of *Casino Journal*, the *National Gaming Summary* and the *Atlantic City Insider*, and was the founding editor of *Casino Player* magazine. He was a co-founder of the American Gaming Summit and the Southern Gaming Summit conferences and trade shows.

He is the author of the best-selling book, "How to Win at Casino Gambling" (Carlton Books, 1995), now in its fourth edition. Gros was named "Businessman of the Year" for 1998 by the Greater Atlantic City Chamber of Commerce, and received the Lifetime Achievement in Communications Award from the American Gaming Association in 2012.

Today's Speakers

Sue Schneider is one of the world's leading experts on the internet gaming industry which she began monitoring in 1995. Starting as an owner of leading gaming consumer portal from '95-'99, she then launched River City Group, which produced the largest i-gaming events in the world (GIGSE and EiG) as well as key industry trade publications, such as *iGamingNews.com* and the *Internet Gambling Report*. In July, '06, River City Group was purchased by Clarion Events, one of the UK's largest event producers, and Schneider remained as CEO/Americas there until June '09.

She recently became VP Strategy & Growth/Americas for Sports Betting Communities (www.sbcevents.com) on their efforts to launch a sports betting show in the US. Until September, 2019, she served as Editor-in-Chief for Liebert Publications' *Gaming Law Review*. Until 2016, she was a partner with the US-based conference (www.igamingnorthamerica.com) which was sold to iGaming Business, a division of Clarion Events Gaming. She's a former partner in the www.maltaigamingseminar.com and, in addition, works with the G2E event as a consultant for the iGaming Congress.

Schneider was a founder and served as Chairman of the 120-member Interactive Gaming Council (IGC), a trade association, from its inception in 1996 until 2004.

She is a frequent speaker at international gaming conferences and has testified to the US Senate and the US House of Representatives.



Sue Schneider
VP, Growth & Strategy,
Americas, Sports Betting
Community (SBC)

Today's Speakers

Kresimir Spajic is Senior Vice President of Online Gaming for Hard Rock International. Spajic is responsible for leading the vision, strategy and operational execution behind the brand's investment across interactive gaming platforms. Spajic is instrumental in securing new strategic partnerships and future opportunities to further position Hard Rock Hotels & Casinos as a global leader in the international and online gaming spaces.

Since joining Hard Rock International in early 2016, Spajic has led the company's rollout of its online gaming and/or sports betting platform in the States of New Jersey and Iowa, as well as Hard Rock's mobile free to play games. His extensive experience in online gaming is creating multiple new opportunities for Hard Rock International.

Previously Spajic held various executive roles in the online gaming and advertising industry, and has significant experience in management, marketing, global business development, entrepreneurship and public speaking.

Spajic holds a multidisciplinary graduate degree in management, law and humanities from SDA Bocconi School of Management (Italy), University of Neuchâtel (Switzerland) and De Montfort University (England). He is based in Hollywood, Fla., at the Hard Rock International headquarters.



Kresimir Spajic
*Senior Vice President &
Managing Director, Online
Gaming and Sports Betting,
Hard Rock International*

Today's Speakers



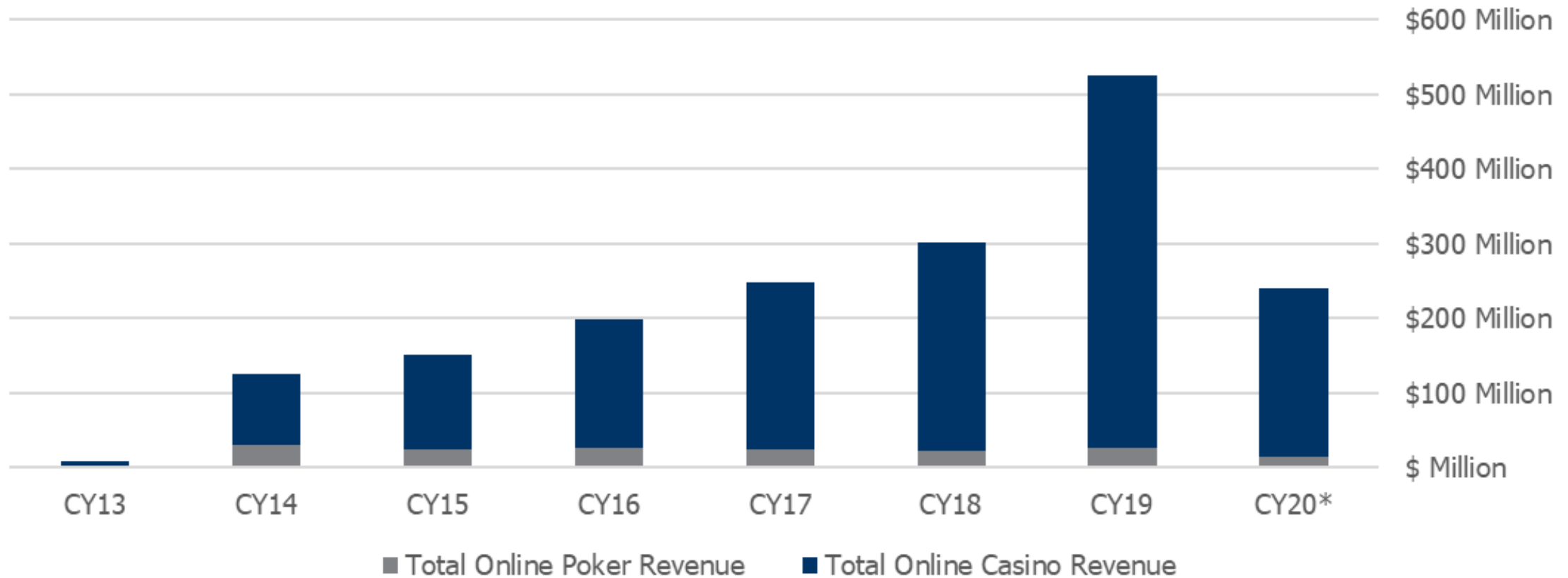
Dermot Smurfit
CEO, GAN

Dermot Smurfit is the CEO of GAN, the leading Platform for U.S. Internet gambling with major clients of real money Internet gambling including FanDuel Group, Parx Casino and JACK Entertainment. GAN also offers a U.S. market leading B2B Social Casino solution branded 'Simulated Gaming', which leverages existing Casino reward programs to offer casino patrons a Social Casino experience designed to generate incremental online revenue and drive incremental visits on-property. Native American operator clients of Simulated Gaming include San Manuel, Chickasaw Nation, Agua Caliente, Snoqualmie and Oneida Nation.

With operations in New Jersey, Pennsylvania, Nevada and California, GAN's mission to bring America's casinos online is far from over and leverages the enterprise technology system developed by GAN in Europe since 2002, as well as the digital user acquisition marketing and retention know-how within GAN Digital, the multi-client agency owned by GAN in Tel Aviv, Israel, which provides Marketing Services to American clients. Dermot is a corporate attorney by background and education and leads approximately two hundred people worldwide with engineering groups in London and Bulgaria, supported by technology operations in Las Vegas, Nevada.

Dermot took GAN public on the NASDAQ stock exchange in May 2020 (NASDAQ: GAN) raising \$62M in expansion capital in order to cement GAN's market position as a leading player in the fast-growing U.S. Internet gambling market.

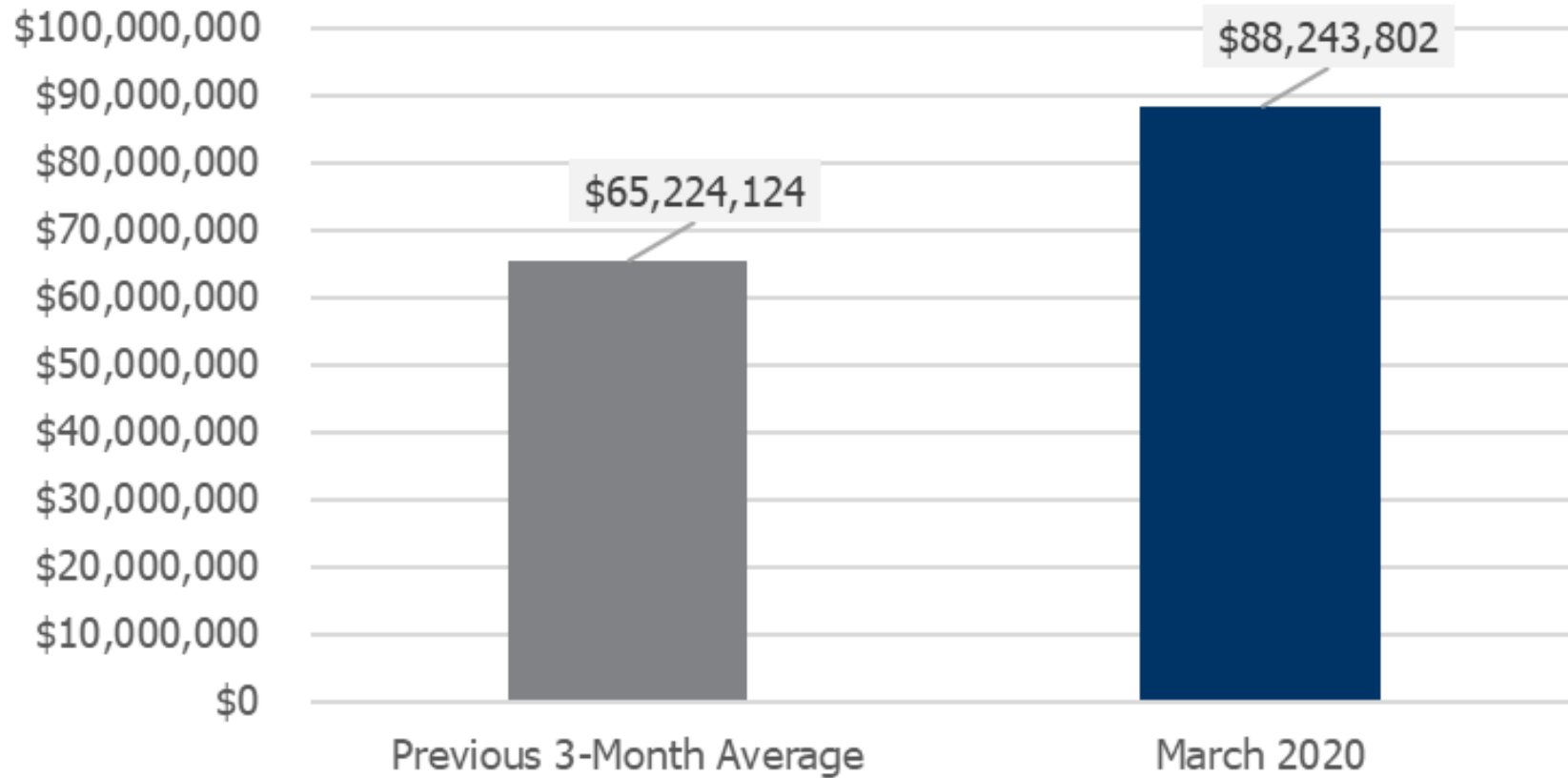
Total U.S. Nationwide Annual Online Casino and Poker Revenue



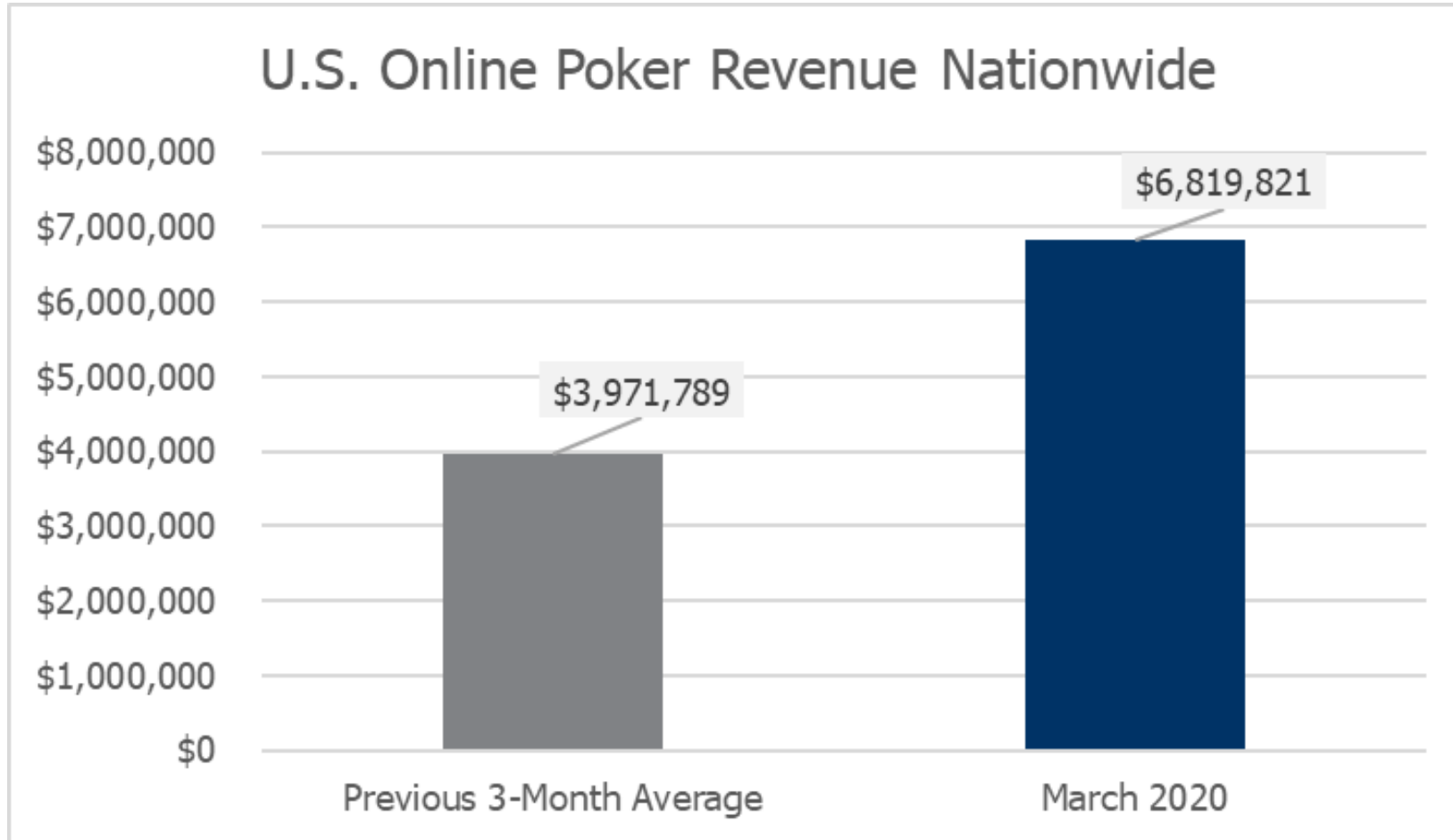
*CY20 includes revenues only through March 2020

Courtesy of Eilers & Krejcik Gaming LLC

U.S. Online Casino Revenue Nationwide



Courtesy of Eilers & Krejcik Gaming LLC



Note: Online Poker totals exclude Nevada, as the state's Gaming Control Board is not provided sufficient data to differentiate land-based from online play

Courtesy of Eilers & Krejcik Gaming LLC

New Jersey April 2020 Gaming Revenue

<u>Category</u>	<u>NJ April 2020 Revenue</u>	<u>YoY Growth/Decline</u>
In-Person Games	\$0	N/A
Online Poker	\$5.1 million	+208.7%
Online Casino Games	\$74.8 million	+114.3%
Sports Betting	\$2.6 million	-87.6%

Operational Status Of State Online Casino And Poker

State	Online Poker Status	Online Casino Status
Delaware	Operational	Operational
Nevada	Operational	N/A
New Jersey	Operational	Operational
Pennsylvania	Operational	Operational

States Pending Launch	Status	Products
West Virginia	Not Live Yet	Casino And Poker
Michigan	Not Live Yet	Casino And Poker

State	Online Casino Bill Pending?	Status
Connecticut	Yes	Canceled
Hawaii	Yes	Suspended
Kentucky	Yes	Canceled
Massachusetts	Yes	Open
Nebraska	Yes	Suspended

VS

Operational Status Of State Sports Betting

State	Retail Status	Online Status
Arkansas	Suspended	N/A
Colorado	Suspended	Operational
Delaware	Suspended	N/A
Illinois	Suspended	N/A
Indiana	Suspended	Operational
Iowa	Suspended	Operational
Michigan	Suspended	N/A
Mississippi	Suspended	N/A
Montana	Operational	N/A
Nevada	Suspended	Operational
New Hampshire	N/A	Operational
New Jersey	Suspended	Operational
New Mexico	Suspended	N/A
New York	Suspended	N/A
Oregon	Suspended	Operational
Pennsylvania	Suspended	Operational
Rhode Island	Suspended	Operational
West Virginia	Suspended	Operational

States Pending Launch	Status	Channel
District Of Columbia	Not Live Yet	Retail and Online
Illinois	Not Live Yet	Online
Michigan	Not Live Yet	Online
Tennessee	Not Live Yet	Online

National Online Casino Landscape: Gross Revenue By Brand January–March 2020

Brand	States Where Active	Gross Revenue	Share Of Gross Revenue
Betfair-FanDuel	NJ, PA*	\$46,009,313	20.3%
SugarHouse-Rivers	NJ, PA	\$28,502,645	12.6%
DraftKings	NJ	\$22,730,033	10.1%
Golden Nugget	NJ	\$20,338,107	9.0%
Borgata	NJ	\$17,385,278	7.7%
Tropicana	NJ	\$10,019,330	4.4%
PokerStars	NJ, PA	\$9,741,669	4.3%
Caesars	NJ	\$8,563,039	3.8%
Penn National	PA	\$8,200,314	3.6%
Hard Rock	NJ	\$7,727,584	3.4%
Parx	NJ, PA	\$7,409,605	3.3%
MGM	NJ	\$7,243,866	3.2%
Resorts	NJ	\$7,235,907	3.2%
Unibet	NJ, PA	\$5,879,741	2.6%
Mohegan	NJ	\$3,679,698	1.6%
Virgin	NJ	\$3,339,777	1.5%
Pala	NJ	\$2,897,546	1.3%
Harrah's	NJ	\$2,140,760	0.9%
Ocean Resort	NJ	\$1,536,564	0.7%
888	NJ	\$1,529,115	0.7%
Party	NJ	\$1,448,774	0.6%
BetAmerica	NJ, PA	\$1,146,199	0.5%
Delaware**	N/A	\$1,107,943	0.5%
bet365	NJ	\$356,428	0.2%

Courtesy of Eilers & Krejcik Gaming LLC

Week	Revenue Change WoW %	Patron ¹ Online Visits WoW %	Patron ¹ Online Bets per Visit
3/2	- - -	- - -	261x
3/9	+29%	+4.5%	260x
3/16	+15%	+12.1%	343x
3/23	+10%	+12.7%	406x
3/30	+110%	+3.4%	369x

Example Simulated Gaming clients:
www.WinStarOnlineGaming.com
<http://play.SanManuel.com>
<http://play.TurningStone.com>

Major client of GAN's Simulated Gaming, Native American Casino Operator, Week-on-Week Change in March 2020

Note 1: GAN's U.S. patented iBridge Framework enables casino patrons to link their Reward Account to their Online Account for Simulated Gaming (also called Social Casino gaming)

Courtesy of GAN Limited (NASDAQ: GAN)

Feedback and Questions

Please submit any additional feedback and questions at:

Info@casinowebinar.com

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