

# Changing the game

The sports betting sector is perhaps the most agile part of the online gaming sector when it comes to responding to market forces and identifying opportunities. **iINTERGAMINGi** talked to some of sports betting's biggest names – and leading innovators

**I**T really wasn't that long ago that the online sports betting industry welcomed in-play wagering, mobile apps and, more recently, cash-out betting.

In sports betting, the innovations have come thick and fast, driven by a hardworking and responsive industry that is continually seeking to innovate and offer the customer more.

**iINTERGAMINGi** speaks to a handful of leading names from across the online sports betting sector about recent developments – and about the innovations to come.

**iINTERGAMINGi:** What were the major innovations in sports betting that impressed you most in 2015?

**Bernard Marantelli, CEO and founder of Colossus Bets:**

"An innovation in itself was that firms decided to take the area of innovation seriously, with William Hill and Matchbook to name two, launching 'innovation groups/labs'. The wave of industry mergers may slow this trend but it is encouraging to see firms who are investing to try and ensure that they are at the cutting edge of what the next technology breakthroughs might be for the sector.

"In a sports betting context, 2015 was the year that partial cash-out – enabling players to bank profits on a multi-leg bet in parts – exploded onto the scene. Traditional 'all or nothing' cash-out is now a sub-optimal product and operators who don't offer 'partial' are playing catch-up."

**BERNARD MARANTELLI, CEO AND FOUNDER OF COLOSSUS BETS:**

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**Paul Witten, commercial director at SIS:**

"There have been a number of innovations in the past year that have caught the eye, in particular cash out, which allows punters to stay engaged during the game, and the significant growth in mobile, which is making the betting experience more personal and interactive.

"It's remarkable to think that just a few years ago, most fixed-odds operators weren't offering bet-in-play or cash-out services to their customers. Fast-forward to today and punters

are engaged for longer and can bet in-play, or cash out, on a huge range of sports, matches and markets.

"Underpinning the growth of this sector is the data now available to sports bettors at the swipe of a finger or a quick click. The sea change in information has helped fuel innovations such as cash out, and the growth in mobile. Many operators are now supplying punters with up-to-the-second data from live football, rugby and cricket matches covering not just goals, tries and runs, but dangerous attacks, precise pitch position of the ball, and even bowling speeds and field positions.

"Sports bettors now have their own betting shop on their mobiles that can be tailored and personalised, making the betting experience more personal and interactive. It's then little surprise that growth in mobile continues apace, with bet in-play wagers making up an ever-larger share of bookmakers activity.

"The key factor in this rush of data in 2015 and operators' ability to deliver this information to their punters is, of course, the speed at which it is collected and transmitted. Official partnerships to supply data, such as SIS' with La Liga, ensure this data is delivered to operators even faster."

**Tobias Brunner, director of marketing operations at Betradar:**

"Another year has gone by and there seems to have been no let up in the sports betting world. For betting and gaming operators looking to take advantage of the seemingly unstoppable rise of in-play and mobile betting, the time has never been better.

"Not only are multiple distribution channels providing ease of access to online betting, but changing consumer behaviour is becoming more mobile-based and 'always online'. Most of this is being driven by a perfect storm that sees today's technology deliver automated feeds to fully managed platforms as well as significant advances in mobile capabilities that together are enabling consumers to place bets from any location and at any time during an event. To put it simply, we are in an industry that requires constant innovation and the highest standards of reliability.



"At Betradar, we constantly strive to develop cutting-edge solutions and services that are driven by technological innovation and a deep understanding of our clients' business needs and the last 12 months were no different. So in 2015, we rolled out our Managed Trading Services, we launched our new suite of e-sports products, we brought our new Virtual Basketball to the market – and that was just the tip of the iceberg!"

**Jeeve Jeyaratnam of Super Soccer:**

"Cash-out exploded in 2015 and that has to rank highly, though to call it an 'innovation' is a bit of stretch. It is clever marketing and you have to admire the way the firms have sold it to the public.

"The trend for in-play wagers sees no sign of abating and Ladbrokes recently posted some remarkable numbers supporting this notion. This form of betting, nascent five years ago, now commands an ever-increasing percentage of turnover. Aligned perfectly to the cash-out and in-play options is the increasing number of live-streamed betting opportunities.

"Firms have realised that keeping customers on site, where they can watch the action while they bet, is a tremendous way of maintaining engagement in an era where brand loyalty is all but extinct."

**TOBIAS BRUNNER, DIRECTOR OF MARKETING OPERATIONS AT BETRADAR:**

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**What do these innovations tell us about what to expect in 2016, especially given the summer's Euro 2016 football championships?**

**Brunner, Betradar:** "Historical betting patterns show that the European Championships traditionally provide a major boost to all bookmakers and therefore represent the perfect opportunity to take a new approach to drive more revenues through interactive in-play betting services.

"Two years is a long time in technological terms so the changes that have taken place since the 2014 World Cup in Brazil have been immense. Therefore, one thing is for sure: Euro 2016 in France will be the most social, interactive and shareable sporting event there has ever been.

"Mobile services providing live entertainment, such as Betradar's recently released Live Match Centre for the European Championships, combined with fun components and bolt-ons, will ensure a new generation of punters are engaged and entertained."

**Marantelli, Colossus:** "Partial cash-out is a feature synonymous with and perfectly suited to multi-leg football 'acca' bets, which obviously makes it a compelling product feature for Euro 2016.

"As a company whose main business is providing B2B partners with access to multi-million pounds jackpot pools led by top-tier football, Euro 2016 is a huge focus.

"In the context of our pools, the partners with whom we are currently contracting are very focused on the tournament."

**Jeyaratnam, Super Soccer:** "Live streaming won't be an important feature for the Euros as all the games will be available in HD on terrestrial TV, but there is no doubt that in-play and cash-out will be at the forefront of the bookmakers'

advertising campaigns. From a personal point of view we know demand for our Goalscorer Prices and Settlement system will be great.

"Goalscorers are a high-margin product and will help maintain interest for punters in this expanded European Championships. 'Anytime goalscorers' are catching up with the 'first goalscorer' product as the go-to goalscorer bet.

"Adding win/draw/losecasts, all available via GPS, can provide game-long betting interest and more attractive pricing."

**Witten, SIS:** "Thanks in part to the boom in information in 2015, punters are now better informed than ever before and have a seemingly unquenchable thirst for data. This trend will doubtless continue this year and beyond. Operators who have the fastest and most reliable data feeds, allowing delivery of as much data as their customers can handle, will be in good stead ahead of a busy summer calendar of sport.

"With marquee events such as Euro 2016, punters will take their business elsewhere if they can't get the betting information they need."

**What is your company doing to remain at the forefront of the sector?**

**Jeyaratnam, Super Soccer:** "To remain competitive within our niche of the sector we have improved and extended our core algorithm.

"We can now offer up to 18 individual player markets, our coverage levels have also increased in recent times with the Belgian Jupiler league the latest extension to the service. For details on our full coverage visit [www.gps-system.co.uk/coverage](http://www.gps-system.co.uk/coverage).

"We have some ideas up our sleeve regarding the future but these will remain in-house for now!"

**Witten, SIS:** "SIS has always been at the forefront of the industry when it comes to delivering data and pictures, and in 2015 we launched our own pricing service, supported by a new trading team, and 2016 will see an expansion of our pricing services to more areas. Our customers can now benefit from comprehensive pricing solutions in addition to our existing portfolio of content.

"We are also making further strides to extend our streaming offer. In 2015 we launched our ultra-low latency streaming platform, which is optimised for betting and has the flexibility to deliver any content, anywhere in the world from satellite and IP. We also expanded our streaming content offer by adding BAGS for international customers, in addition to extending our Singapore and Meydan horseracing streaming rights.

"In December our new mobile on demand games went live on the Sky Vegas website. The HTML5 browser-based games are an industry first as they enable users to play anytime, anywhere, rather than be restricted to scheduled races. The interactive games include horse racing, greyhound and cycling varieties and provide punters with up to six-times more betting opportunities than current traditional, scheduled virtual races.

"The suite of games also included seasonal Christmas games - Santa Sack Racing and Santa Chimney Racing, and further seasonal games will be available in the future."

**Marantelli, Colossus:** "We are continuing to add new B2B partners into our shared liquidity pool, with the objective of making us the EuroMillions of the sports betting world.

"At the beginning of 2016 we released the world's biggest free-to-play predictor game with a £1m weekly Pick6 jackpot. It is similar in structure to Sky's hugely popular Super6, but with added features including leg-by-leg cash-out, which enables players to take profits from their free tickets as the matches in the pool are resolved over the weekend.

"Away from our core home of sports betting we have invested in and released the world's first (and only) cash-out slot, Colossus Fracpot, which went live with Sky Vegas in the fourth quarter of 2015 and we have a series of other Fracpot games being rolled out in 2016."

**Brunner, Betradar:** "Our vision is to become the industry's unique 360-degree 'one-stop-shop' provider. This can only be achieved by anticipating the demands and trends of the betting and gaming sector. Customers' ideas and experiences are a vital source of innovation for us, but the pressure is also on operators to ensure they have the best sportsbook products possible.

"Part of this comes down to an intuitive understanding of the end user. Operators will need to simplify and manage their daily operations in a fast, efficient and cost-effective manner. Betradar's Managed Trading Services focuses in on this demand by enabling them to delegate their risk and liability management to our proven industry experts and our goal is to see the MTS make a real impact, redefining notions of what a single betting solutions provider can do.

"Besides automating the betting processes, the focus will also be on providing entertaining and revenue-driving solutions. For our live channels, we are on the verge of offering previously unexpected opportunities for streaming products within the betting industry. The focus will be on generating even more entertainment as well as bet stimulation combined with live streams, to maximise the turnover potentials of sportsbooks.

"More developments have followed our success with virtual sports, and we have now released the next 'built for betting' virtual sports experience - Virtual Basketball - to strengthen our position as the market-leading provider of virtual sports. Last but not least, Betradar has recently entered into an exclusive data partnership with the Electronic Sports League, providing our clients with the highest quality data feeds available in e-sports betting."

**In this sector, how important is it to be seen as an innovative business? Do punters expect more from sports books than they did, say, five years ago?**

**Brunner, Betradar:** "Punters are in fact becoming increasingly demanding, yes. They expect entertaining and bet-stimulating tools, as well as deep information from sports betting operators, in order to analyse bets. Therefore, an innovative culture is becoming an ever more vital element of business success. And how companies innovate is changing.



"The days when innovation was the operational task of research and development units at the sidelines of the business have gone. Successful companies recognise that innovation is a mainstream process, which brings together frontline teams, customers and a range of different partners from beyond the organisation. Operational innovation means coming up with new ways of developing products, providing customer service, or doing any other activity that an enterprise performs. This can also take the shape of disruptive innovation; where innovations create new markets by finding new consumers.

"This is happening, for example, in the world of bookmaking as organisations move their focus away from bricks-and-mortar and attract new customers through virtual games and in-play betting (online betting in itself was hugely disruptive to the industry). They're providing fun, convenient, easy-to-use and easy-to-understand platforms that draw in punters.

"Today, especially, social media and mobile technology are providing fresh ground to innovate further – areas where small to medium-sized bookmakers can excel."

**Marantelli, Colossus:** "While some view this sector now as a marketing/CRM arms race, the innovation incubators I mentioned earlier and the fact that the big firms have publicly committed to increasing their in-house product

investment, suggests that the industry recognises the importance of innovating.

"Like all digital consumers, online punters expect usability and functionality to continually evolve and improve.

"As firms raise their game, those who are slow to adapt will be left behind and the biggest marketing budget in the sector won't compensate."

**PAUL WITTEN,  
COMMERCIAL DIRECTOR  
AT SIS:**

*"With marquee events such as Euro 2016, punters will take their business elsewhere if they can't get the betting information they need."*



**Witten, SIS:** "As is the case in any sector, standing still is a sure way to ensure your business goes nowhere.

"However, in our hyper-competitive industry, innovation is the difference between acquiring and retaining customers, or seeing them drift away to your competition – which can happen in an instant.

"However, the important thing is to walk the walk – you actually have to be innovative. SIS, having listened to our customers, rolled out a suite of on-demand virtual games in late 2015, which were a first for the industry, as the on-demand games means that punters no longer have to wait for scheduled virtual races. It's also a great example of innovation allowing operators to give punters what they want.

"Punters and non-punters alike now have a wealth of information at their fingertips, with web sites and social media allowing anyone to become an expert in practically anything instantly. Sports bettors today are better informed than ever and expect their bookmaker to provide the information that they require.

"Spoilt for choice, punters won't stick with a bookmaker if they feel they are missing out or there are better options elsewhere. Bookmakers need to ensure they are innovating, and offering their customers everything their competition is and more."

**Jeyaratnam, Super Soccer:** "There is no doubt that the punters' lot has improved hand-over-fist in the last five years. As mentioned above, brand loyalty has by and large evaporated and firms are going to increasing lengths to try and reverse that trend.

"The marketing ploys are very innovative but predominantly aimed at 'new' customers only. The market is so saturated that only the

## Take the effort out of goalscorer pricing and settlement

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strongest sportsbooks will survive.

"This has a knock-on effect on improving quality - weaker offerings can simply be ignored by a customer presented with such choice."

#### What are your expectations for ICE 2016?

**Witten, SIS:** "ICE 2016 is going to be a fantastic event where the industry will meet to discuss the key issues, innovations, products and markets. All of the SIS team are looking forward to it immensely.

"We've got plenty to show and tell, and high on my priority list is to share our exciting new content, distribution, and gaming products and services. My diary is already filling fast with meetings with key people from operators spread right across the world and I can't wait to get started. SIS has an exciting suite of products and services to showcase on our stand."

**Marantelli, Colossus:** "Because I think 2016 will be the year that partial cash-out starts to invade wider gaming verticals, I think we will be swamped with interest on our Fracpot games.

"Innovation in slots has generally been limited to the addition of the latest Hollywood movie franchise onto an existing game engine - 2016 will be the year partial cash-out revolutionises slots even more than it did for sports betting in 2015."

**Brunner, Betradar:** "ICE 2015 was a huge success for Betradar. Our stand ended up being the key hangout for members of the sports betting and gaming industry. So, what does 2016 have in store for Betradar and its clients? We are looking forward to picking up where we left off: providing state-of-the-art product demonstrations, launching and presenting our latest product innovations and making a visit to our stand both informative and entertaining.

"Visitors can further expect a huge extension of our live odds coverage and experience the advantages and benefits of MTS for their business. Our live streaming unit will showcase how the live channel increases the attractiveness of sportsbooks and maximises revenues through the integration of our live streams into their website. For the virtual portfolio, we will take the next step in an increasingly mobile world, to let punters enjoy virtual sports betting on the go, anywhere. Clichéd as it may sound, the Betradar stand at ICE is the best bet to see what the future of sports betting will involve."

**Jeyaratnam, Super Soccer:** "I fully expect ICE to be bigger and more populous than ever.

The increasing awareness shown from foreign governments to the legislation of their own gambling markets means that this show will feature more and more overseas visitors.

"Obtaining licences for these newly emerging countries is a tricky business and there is little

doubt that compliance issues will take up many a firms' legal teams in 2016. Differing tax regulation by territory mean analysis of profits and margins will come under increased scrutiny. With the Dutch government announcing plans for a 29 per cent gross revenue taxation scheme there will need to be a large difference in prices between offerings. A 125 per cent 1x2 market would be looked upon with derision in the UK but this may become the norm in areas with particularly high taxation methods.

"This will be a very interesting/complicated area for companies to deal with. Our GPS system is well setup for this kind of issue as we can provide firms with our raw pricing feeds. This allows a much simpler way to add margin dependent on territory.

"We've seen a plethora of mergers and acquisitions in the last year and there is little doubt that this will continue into 2016 especially for firms holding licences in areas their predators may not have been able to exploit."

#### JEEVE JEYARATNAM OF SUPER SOCCER:

*"To remain competitive within our niche of the sector we have improved and extended our core algorithm."*



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