

Sports-Betting

State-by-State Guide to Sports-Betting in the USA

In May, the United States Supreme Court finally gave the go ahead for New Jersey to offer sports betting. In one of the most significant developments in years, the decision will utterly transform the gaming market in the United States.

Now that Governor Phil Murphy has signed Assembly Bill 4111, allowing sports betting at New Jersey casinos and racetracks, attention is now turning to other states to see how sports betting will be permitted and under what conditions.

New Jersey's efforts were backed by at least twenty states and the National Governors Association. Lawmakers in a number of states are already moving forward with plans to open up the market. In June Delaware became the first state outside of Nevada to offer full sports betting. A staggering \$9.8 million was wagered in Mississippi casinos during the first month of sports betting in the state.

At the same time a number of state governments have already introduced legislation that could reverse prior state prohibitions on sports betting now that the Professional and Amateur Sports Protection Act (PASPA) has been overturned. However, estimates as to the final number of states which will ultimately allow for sports betting range from less than half to as high as forty-eight and the picture is a varied one. In addition, while a number of states seem eager to regulate the industry, in others states there is considerable opposition meaning the road to liberalisation could be a long drawn out battle lasting years.

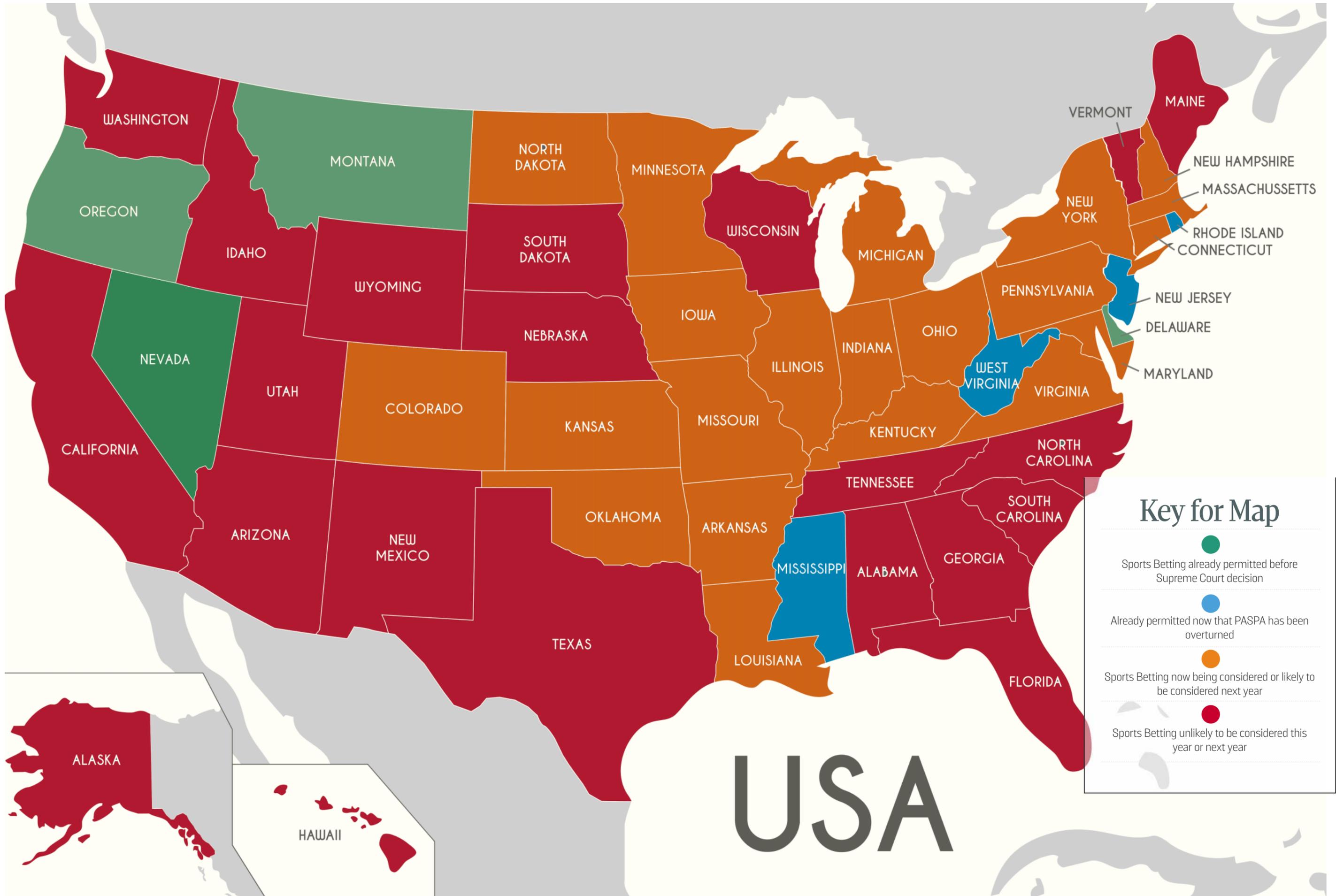
Either way states and sovereign tribal nations now have the power to create a sports betting market that will protect consumers, preserve the integrity of the games, empower law enforcement to fight illegal gambling, and generate new revenue for states, tribes, sporting bodies, broadcasters and many others.

With legislation now under consideration in several states, this state-by-state map highlights the most recent and significant changes at a glance while the state guide summarises the most recent regulatory changes and the potential likely outcomes in each state.

SPORTS BETTING LEGISLATION

STATE	POPULATION	LIKELIHOOD OF LEGISLATION
Alabama	4,888,949	Highly Unlikely
Alaska	738,068	Highly Unlikely
Arizona	7,123,898	Likely
Arkansas	3,020,327	Likely
California	39,776,830	Likely
Colorado	5,684,203	Likely
Connecticut	3,588,683	Highly Likely
Delaware	971,180	Already in Place
Florida	21,312,211	Unlikely
Georgia	10,545,138	Highly Unlikely
Hawaii	1,426,393	Highly Unlikely
Idaho	1,753,860	Unlikely
Illinois	12,768,320	Highly Likely
Indiana	6,699,629	Highly Likely
Iowa	3,160,553	Highly Likely
Kansas	2,918,515	Very Likely
Kentucky	4,472,265	Highly Likely
Louisiana	4,682,509	Likely
Maine	1,341,582	Unlikely
Maryland	6,079,602	Highly Likely
Massachusetts	6,895,917	Highly Likely
Michigan	9,991,177	Highly Likely
Minnesota	5,628,162	Likely
Mississippi	2,982,785	Already in Place
Missouri	6,135,888	Highly Likely
Montana	1,062,330	Already in Place
Nebraska	1,932,549	Unlikely
Nevada	3,056,824	Already in Place
New Hampshire	1,350,575	Highly Likely
New Jersey	9,032,872	Already in Place
New Mexico	2,090,708	Likely
New York	19,862,512	Highly Likely
North Carolina	10,390,149	Likely*
North Dakota	755,238	Likely
Ohio	11,694,664	Highly Likely
Oklahoma	3,940,521	Highly Likely
Oregon	4,199,563	Already in Place
Pennsylvania	12,823,989	Highly Likely
Rhode Island	1,061,712	Already in Place**
South Carolina	5,088,916	Highly Unlikely
South Dakota	877,790	Likely
Tennessee	6,782,564	Highly Unlikely
Texas	28,704,330	Highly Unlikely
Utah	3,159,345	Highly Unlikely
Vermont	623,960	Highly Unlikely
Virginia	8,525,660	Likely
Washington	7,530,552	Likely
West Virginia	1,803,077	Already in Place
Wisconsin	5,818,049	Likely*
Wyoming*	573,720	Likely*

*In the long term five years or so **Likely to go live in mid-November





Alabama

State **Alabama**
 House of Representatives Republican
 Senate **Republican**
 Governor/Party Kay Ivey - Republican

Legislative Summary

Lawmakers have been against gambling for many years and it is unlikely that the state will permit sports-betting. Many elected officials remain opposed to any form of gambling. There are only three casinos in operation operated by the Poarch Band of Creek Indians, and no table games are permitted. Gov. Kay Ivey has not commented on whether she supports sports-betting, but popular opinion would probably go against the move. Rep. Paul Lee from the Alabama legislature, however, has said that the state legislature could look at the issue during the next legislative session in 2019, which would call for a referendum on sports-betting, though he said its chances of passing are very slim

Gov. Kay Ivey has not commented on whether she supports sports-betting, but popular opinion would probably go against the move. Rep. Paul Lee, however, has said that the state legislature could look at the issue during the next legislative session in 2019



Arizona

State **Arizona**
 House of Representatives Republican
 Senate **Republican**
 Governor/Party Doug Ducey - Republican

Legislative Summary

Although Gov. Doug Ducey voiced support for new legislation that would legalise sports gambling and tribal leaders have expressed willingness to change the terms of their licences in order to allow for sports betting, it could be five to seven years before Arizona gives the green light to sports-betting according. Gaming compacts with tribes will begin to expire after 2022. Under a possible new deal the tribes would get the exclusive right to offer sports-betting.

Gaming compacts with tribes will begin to expire after 2022. Under a possible new deal the tribes would get the exclusive right to offer sports betting



Alaska

State **Alaska**
 House of Representatives Democrat
 Senate **Republican**
 Governor/Party Bill Walker - Independent

Legislative Summary

Gambling is restricted in Alaska. Change to gambling laws in Alaska look unlikely and no bills have been introduced for the legalisation of gambling within state lines.

There are no land-based sports books or racetracks in this state. Charity gambling legislation does allow some quasi-sports gambling opportunities. For example you can guess the timing of dog-mushing (sled race) contests, with the closest guess winning a prize – or bet on salmon fishing contests...



Arkansas

State **Arkansas**
 House of Representatives Republican
 Senate **Republican**
 Governor/Party Asa Hutchinson - Republican

Legislative Summary

Current state law prohibits any kind of sports gambling except for state-sanctioned races. No laws have been put forward for the 2019 legislature. However, a drive is underway to allow for sports-betting at casinos and racetracks. One new proposal could allow up to three casinos and voters may be given the opportunity to decide if the proposal makes it to the November 2018 ballot. The new act would allow for an expansion in resort type casino gaming and would legalise sports-betting. In September it was revealed that a proposal from advocacy group 'Driving Arkansas Forward' had collected enough signatures to earn a spot on the ballot in the upcoming November election. It would allow for sports-betting at four casinos.

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California

State **California**
 House of Representatives Democrat
 Senate Democrat
 Governor/Party Jerry Brown - Democrat

Legislative Summary

In California changes to gaming law could take years. A law is pending after State Assembly member Adam Gray introduced a constitutional amendment in 2017, however, before any betting law can be passed by the California legislature, an amendment to the state constitution must be made which, according to some predictions, will not take place until 2020 at the very earliest. In addition, the land-based gambling industry is mostly restricted to tribal casinos and racetracks. In California, the tribes have the exclusive right to offer casino-style games and they are not currently in favour of legalising sports-betting. However, in August the California attorney general's office had approved the title and description for a potential sports-betting amendment to the state constitution that is eligible to appear on the 2020 ballot.

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Delaware

State **Delaware**
 House of Representatives Democrat
 Senate Democrat
 Governor/Party John Carney - Democrat

Legislative Summary

Delaware was the first state outside of Nevada to allow for sports-betting and full-scale sports-betting launched on June 5. Sports wagering in Delaware will be administered by the Delaware Lottery. Delaware was already partially exempt from the Professional and Amateur Sports Protection Act. The state previously offered legal sports-betting on professional football.

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Colorado

State **Colorado**
 House of Representatives Democrat
 Senate Republican
 Governor/Party John Hickenlooper - Democrat

Legislative Summary

While changes to the law are likely the timetable could depend upon whether a change to the constitution is needed to allow for sports-betting. According to an opinion put forward by Colorado's Attorney General, betting on sporting events in Colorado would not require a constitutional amendment, but would only require a change in state law. There is cross party consensus on the issue and lawmakers are expected to push for sports-betting next year. However the issue is expected to meet fierce resistance from already existing land-based operators with The Colorado Gaming Association already saying that it will block the move.

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Connecticut

State **Connecticut**
 House of Representatives Democrat
 Senate Tied
 Governor/Party Dan Malloy - Democrat

Legislative Summary

In July 2017, Governor Malloy signed a bill into law with provisions that allow the state to move forward on sports-betting regulation contingent on changes at the federal level. The state has agreements with federally recognised tribes who operate Mohegan Sun and Foxwoods Resort Casinos, both of which currently have exclusive rights to certain forms of gambling. Malloy has been negotiating with the tribes on the question of where sports bets could be placed and how gaming revenue would be divided. The tribes argue that they have exclusive rights to operate sports-betting in the state, but local lawmakers do not agree. Malloy is leaving office in January and could let his successor deal with the matter. In August, Malloy said that a special legislative session to take up legalised sports betting appears unlikely due to opposition among Connecticut legislators to take up the issue at this point.

The tribes argue that they have exclusive rights to operate sports-betting in the state, but local lawmakers do not agree. Malloy, is leaving office in January and could let his successor deal with the matter.



Florida

State **Florida**
 House of Representatives Republican
 Senate **Republican**
 Governor/Party Rick Scott – Republican

Legislative Summary

Opposition is strong amongst lawmakers and the state would have to first rework compacts with the Native American Seminole Tribe, which is against expansion. The Seminole Tribe is in turn backed by Disney Worldwide Services, which is opposed to any further expansion as well. On the Nov. 6 general election ballot, Florida voters will go to the polls to decide whether to approve state constitutional Amendment 3, the "Voter Approval of Casino Gambling Initiative." The Amendment would require a statewide referendum before any expansion takes place. It would take 60 per cent approval for it to pass. If passed it will change the Florida state constitution, giving voters the right to decide on casino gambling and casino-style games. A new poll shows that 71 per cent of likely Florida voters support Amendment 3, meaning that momentum is gathering slowly for changes to how gaming is regulated in the state. However, it is unlikely that the state will allow for sports-betting given the strong opposition from powerful interest groups in the state.

SBTech seems to have really hit the ground running when it comes to the US market. Could you tell us about some of the agreements the company has signed in the US?

Richard Carter: SBTech has recently deployed in New Jersey and Mississippi. We have taken Golden Nugget Casino and Resorts Casino live in Atlantic City, and launched with Churchill Downs in Mississippi under the BetAmerica brand at Harlow's Casino in Greenville and Riverwalk Casino in Vicksburg. In addition, the Golden Nugget Casino in Biloxi, MS is now also live on SBTech's full retail platform.

In May SBTech announced that it had signed of a long-term agreement with Churchill Downs Incorporated for real money online gaming and sports betting in the US. Could you please tell us more about this agreement?

Richard Carter: The signing of Churchill Downs was a milestone achievement for SBTech. Churchill Downs did a lot of work looking at all the suppliers in the space to power what many feel is the strongest gaming brand in the USA. After months of research, SBTech was chosen to provide Churchill Downs with the full Chameleon360 iGaming platform and sportsbook. Clearly partnering with such a household name as Churchill Downs has helped elevate U.S. interest levels around SBTech and I am sure, it will help act as catalyst for further partner growth of the coming months and years.

SBTech has signed a highly significant agreement with Golden Nugget Casinos in



Richard Carter,
CEO SBTech

SBTech is built from the ground up for regulated markets. Having serviced tier 1 clients in 15 other regulated markets, there is very little we have not seen from a regulatory standpoint. We have been a source of information for lawmakers in advance of legislative bills being written via our work with the American Gaming Association, holding a seat on the Sports Betting Task Force. We are confident that as an increasing number of states open up to iGaming and sports betting, SBTech will be in a position to service our clients from Day 1.

Biloxi, MS and Atlantic City. Could you tell us more about those agreements?

Richard Carter: SBTech is already proving to be an ideal partner for Golden Nugget and a perfect fit for its multi-jurisdictional aspirations. The ability of our teams to launch multiple partners in multiple states – quickly and with precision –



Georgia

State **Georgia**
 House of Representatives Republican
 Senate **Republican**
 Governor/Party Nathan Deal – Republican

Legislative Summary

No pending sports-betting legislation. There is no consensus on the issue and it will not be easy to change the law as the Georgia constitution currently bans all forms of gambling, with the exception of lottery tickets and non-profit bingo games. It would take a two-thirds vote by both the state House and Senate to make an amendment to the constitution that would allow sports-betting. It would then need to be approved in a referendum that would go before the voters.

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was a clear factor in Golden Nugget choosing SBTech. We have already launched retail operations for Golden Nugget in New Jersey and Mississippi, complete with self-service betting terminals and will be adding mobile and mobile on-premises solutions in the coming months to round out our offering in both jurisdictions.

What about any other plans SBTech might have going forward in the US sports betting marker?

Richard Carter: SBTech is currently going through licensing in more states as we onboard new clients. We look forward to leading the way in most states as they continue to adopt sports betting legislation over the next few years.

Regulation is likely to vary greatly from state to state so how will SBTech's business and technology fit into state-by-state regulation of sports betting. Will it be able to suit different regulations in different states and if so how?

Richard Carter: SBTech is built from the ground up for regulated markets. Having serviced tier 1 clients in 15 other regulated markets, there is very little we have not seen from a regulatory standpoint. We have been a source of information for lawmakers in advance of legislative bills being written via our work with the American Gaming Association, holding a seat on the Sports Betting Task Force. We are confident that as an increasing number of states open up to iGaming and sports betting, SBTech will be in a position to service our clients from Day 1.

IGT is already involved in the sports betting market, currently powering MGM Resorts' retail sports betting at 10 major Las Vegas Strip properties, and mobile sports betting on the playMGM app with IGT PlaySpot technology throughout Nevada. Do you think that this will give IGT a head start over its competitors as the company already has experience in the US sports betting market?

Charles Cohen: Absolutely – we were able to go live on day one in New Jersey and be first in market in Mississippi thanks to putting the hard yards in over the past four years for Nevada. IGT invested roughly 300,000 hours of development time into converting our European-focused platform to meet the many complex requirements of a U.S. land-based casino operator, the regulations, and the demands of the players. Anyone who tells you it's easy to deploy a sports betting solution in the U.S. clearly hasn't tried.

IGT will be FanDuel Group's sports betting platform provider for the newly regulated U.S. market in the state of New Jersey. MGM Resorts is also utilising IGT's sports betting platform to run its retail sports betting operations as the State of New Jersey has now opened legalised sports betting. Could you please tell us more about those agreements and any other possible deals in the US market which we can look forward to hearing about in the near future?

Charles Cohen: We are really excited to be working with FanDuel Group. You're talking about one of the smartest operators of sports betting in the world – Paddy Power – combining with one of (if not the) largest communities of sports fans in the US. As for future deals, we're obviously working on many opportunities in the currently regulated states and elsewhere.



Hawaii

State **Hawaii**
 House of Representatives Democrat
 Senate **Democrat**
 Governor/Party David Ige – Democrat

Legislative Summary

Hawaii is currently one of only two states without any form of legalised gambling.

Hawaiian gambling laws are relatively strict, as they prohibit wagering on horse or dog races and gambling aboard ships or in casinos of any kind. In fact, the only kind of gambling permitted in the Aloha States is social gambling, but only if it is not committed in a hotel, motel, bar, nightclub, or any business establishment or public place.



Charles Cohen,
Vice President PlayDigital Sports Betting, IGT

First up, we don't look at it as one market, but as 50. You really need to look at each state or Tribal jurisdiction as if it were a different country, and solve for that. Then you need to figure out how to help customers who operate in more than one location deploy efficiently without falling foul of the Wire Act. We feel we have the right strategy and technology for whatever these individual markets throw at us.

IGT will be competing in the newly emerging U.S. betting market with a new, end-to-end sports betting system. Could you tell us more about this system?

Charles Cohen: IGT is a B2B company in its US sports business. When a customer requires more hands-on support such as risk management, we are looking to combine forces with a partner who is able to provide that service. In Rhode Island, for example, we partnered with William Hill to provide the operational services which the Lottery required in their REP.

How will IGT technology for sports betting specifically meet the demands of the sports betting market in the US as it continues to develop and expand?

Charles Cohen: Every state is going to have its own regulation, standards and procedures. A lot of the work we completed in the past few years was directed toward creating a modern, adaptable construction that would position IGT to thrive in that complex environment. New Jersey and Mississippi were two good examples of that in action and I think you can say we passed the test. But that's not the only dimension here. There's also the Wire Act, which makes it illegal for bets to cross state lines. IGT built technology that solves many of the operational challenges posed by this.

Regulation is likely to vary greatly from state to state so how will IGT's technology for sports betting platform fit into state-by-state regulation of sports betting?

Charles Cohen: We've designed it that way. Being inside IGT, we've been able to access a wealth of knowledge from our colleagues in the Gaming and Lottery businesses, who are of course very accustomed to addressing these challenges. Their experience has been incredibly useful in helping us anticipate the kind of variations we are likely to encounter, and make sure we have the flexibility within our solution to adapt quickly.

Very generally speaking how do you see the market going forward?

Charles Cohen: First up, we don't look at it as one market, but as 50. You really need to look at each state or Tribal jurisdiction as if it were a different country, and solve for that. Then you need to figure out how to help customers who operate in more than one location deploy efficiently without falling foul of the Wire Act. We feel we have the right strategy and technology for whatever these individual markets throw at us.



Idaho

State **Idaho**
 House of Representatives Republican
 Senate **Republican**
 Governor/Party Butch Otter – Republican

Legislative Summary

In Idaho, the state constitution currently prohibits all types of gambling except for a state-sanctioned lottery, pari-mutuel betting, which is most typically used in horse racing, and bingo or raffle games operated by qualified charitable organisations. The Idaho State Lottery is one of the only legal forms of betting in the state. This is likely to remain the case for some time yet.

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Illinois

State **Illinois**
House of Representatives Democrat
 Senate **Democrat**
Governor/Party Bruce Rauner - Republican

Legislative Summary

A number of sports-betting bills were put forward before the Supreme Court decision and momentum has been growing for some time. Lawmakers have also been trying for several years to expand the industry in general. Sports-betting could be permitted under a Gambling Omnibus Bill, which would seek to expand other aspects of the gaming industry. The expansion bill did not cover fantasy sport-betting, internet wagering nor sports-betting. However, under the bill new casinos would be permitted along with gambling terminals at horse racing tracks. While the bill did not get past a House committee in May, lawmakers could reintroduce the bill so that it covers sports-betting as well. A joint hearing of House and Senate committees in August took more testimony on the bill. The bill seeks to widen the scope of gambling in order to bolster state finances and sports betting will be part of another hearing scheduled for October.

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Iowa

State **Iowa**
House of Representatives Republican
 Senate **Republican**
Governor/Party Kim Reynolds - Republican

Legislative Summary

A sports-betting bill was introduced in February and it's believed that Iowa could have been one of the first states to allow for sports-betting, but legislation will now have to wait for the next legislative session. There is still strong impetus for sports-betting. The Lottery unanimously approved a motion to offer sports-betting and there is support for the government to proceed quickly in 2019.

A sports-betting bill was introduced in February and it was believed that Iowa could have been one of the first states to allow for sports-betting but legislation will now have to wait for the next legislative session. There is still strong impetus for sports-betting. The Lottery unanimously approved a motion to offer sports betting and there is sufficient support for the government to proceed quickly in 2019.



Indiana

State **Indiana**
House of Representatives Republican
 Senate **Republican**
Governor/Party Eric Holcomb - Republican

Legislative Summary

Indiana is moving towards allowing sports-betting and has a good chance of passing legislation next year. House Bill 1325 was introduced by Indiana Rep. Alan Morrison in January, which allows for sports wagering at riverboats, racinos, and satellite facilities. It also allows for online sports-betting. After the Supreme Court decision Speaker of the Indiana House of Representatives Brian Bosma said that the study committee would lay the necessary groundwork for consideration next year. In August The Indiana Gaming Commission signed a deal with a Vegas-based consultancy, which will advise lawmakers on the possibilities of sports-betting as they prepare to draft legislation next year.

After the Supreme Court decision Speaker of the Indiana House of Representatives Brian Bosma said that the study committee would lay the necessary groundwork for consideration next year. In August The Indiana Gaming Commission signed a deal with a Las Vegas-based consultancy which will advise lawmakers on the possibilities of sports-betting.



Kansas

State **Kansas**
House of Representatives Republican
 Senate **Republican**
Governor/Party Jeff Colyer - Republican

Legislative Summary

Plans to move quickly in 2019. In March the latest of a number of pro-gaming laws was put forward whereby the Kansas Lottery would be allowed to offer sports-betting at state-owned casinos and on the Internet as well as lottery retailers. Native American tribes also own several casinos in the state and are likely to oppose it. However, the state also owns non-Native American casinos. Sports-betting could be approved in January and up and running as early as July.

Kansas plans to move quickly in 2019. In March the latest of a number of pro gaming laws were put forward whereby the Kansas Lottery would be allowed to offer sports-betting at state-owned casinos and on the Internet as well as lottery retailers.

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The repeal of PASPA could not have come at a better time for the professional sports leagues in the United States. With viewership stagnating for some leagues and even on the downturn for others like the NFL, legalized sports betting is the shot in the arm that was needed to reignite growth in viewership for sports again.

NBA commissioner Adam Silver knew this even back in 2014, when he penned an Op-Ed in the New York Times calling for the legalization of sports betting. While other commissioners remained silent on the issue, the NBA was front and center lobbying for regulation that would allow its fans to be more engaged with the games.

In the NBA especially, where the best players have been consolidating onto just a few teams, the league is struggling to create storylines that get a large audience to tune in each night to see matchups like the Indiana Pacers vs. the Milwaukee Bucks. The once exciting matchup of the Oklahoma City Thunder vs. the Golden State Warriors is now much less intriguing since superstar Kevin Durant left OKC and joined forces with Steph Curry and Klay Thompson in the Bay Area.

Fantasy Sports has no doubt been able to help keep football exciting because participants can draft players from over half a dozen teams, and even if a game is lopsided, there is still a reason to watch until the end if you need 5 more yards from Todd Gurley as the Rams run out the clock. Not all sports are created equal when it comes to fantasy sports, however. The NFL accounts for 90% of fantasy sports entries according to most



Jonathan Aiwazian,
US Regional Director, BetConstruct

At BetConstruct, we are pouring resources into video streaming to bring the perfect complement to sports betting with our Friendship Platform from FeedConstruct. Working with the leagues and federations around the world, we are adding a library of live streams to our product offering, allowing hundreds of operators globally to tap into the video feeds. As a result, the leagues get a new avenue to distribute their content where they set the price of access and receive a big bump in global viewership.

studies, so the other leagues have not seen a similar effect. With sports wagering, the NBA and MLB do considerably better, where their much longer season schedules are a huge benefit.

The influx of new viewers caused by their ability to wager on sports will generate demand for TV broadcast and live streaming platforms to provide access to all matchups. Social media and tech giants have gotten in on the action, with Twitter paying up for the rights to Thursday

night football last year, and this year Amazon cutting a deal with the NFL to provide live streams to their members. The leagues can now sit back as a bidding war takes place for the rights to stream their content. The platforms that are quick to snatch up the leagues' content will be able to enjoy increased engagement among their users at the expense of their competitors.

We expect to see many new platforms springing up soon, with streaming becoming the primary means for fans to consume games. It will be interesting to see how networks are able to integrate sports betting flavor into their broadcasts. Already, ESPN has begun talking about which teams will 'beat the spread' on College GameDay versus what we usually see of commentators picking who will win outright.

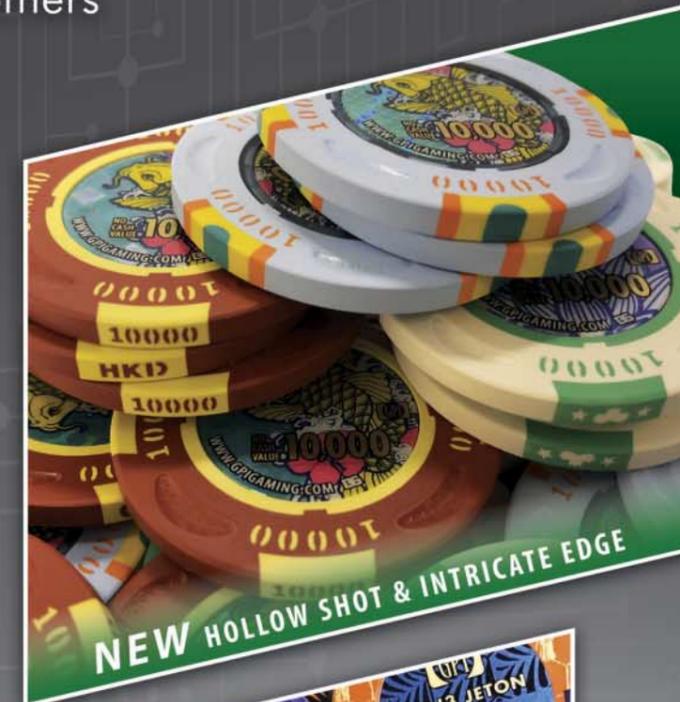
At BetConstruct, we are pouring resources into video streaming to bring the perfect complement to sports betting with our Friendship Platform from FeedConstruct. Working with the leagues and federations around the world, we are adding a library of live streams to our product offering, allowing hundreds of operators globally to tap into the video feeds. As a result, the leagues get a new avenue to distribute their content where they set the price of access and receive a big bump in global viewership.

The time for innovation in the union of sports streaming and sports betting is now, and we are excited to see how that industry shapes itself in the coming years as more and more states bring sports betting out from the shadows and begin regulating their markets.

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SMART RFID



Kentucky

State **Kentucky**
House of Representatives **Republican**
Senate **Republican**
Governor/Party **Matt Bevin - Republican**

Legislative Summary

The government is preparing to legalise sports-betting in 2019. After the Supreme Court decision nine members of the legislature announced that they would look into the topic in order to draft sports-betting laws. In June Sen. Julian Carroll, a member of the group, said that the Kentucky Horse Racing Commission would be required to institute a sports wagering system for horse racing tracks and off-track facilities. It would require a \$250,000 annual license and would permit betting on college sports as well. The tax could be very high standing at three per cent handle. However, there would be no payment of fees to guarantee the integrity of sport.

In June Sen. Julian Carroll, a member of the group, said that the Kentucky Horse Racing Commission would be required to institute a sports wagering system for horse racing tracks and off-track facilities.



Louisiana

State **Louisiana**
House of Representatives **Republican**
Senate **Republican**
Governor/Party **John Bel Edwards - Democrat**

Legislative Summary

Lawmakers rejected a bill during this year's session that would have allowed sports betting in Louisiana depending on the US Supreme Court decision. Bill SB 266, would have allowed sports-betting at the state-regulated Harrah's casinos along with the 15 riverboat casinos. However, the bill failed in the Senate Finance committee. The state's neighbours Arkansas is pushing for sports-betting expansion as could Ohio, meaning the state will lose money to its neighbours, which look set to regulate the industry. However, a timetable of any pro gambling law is hard to predict. It could be up to two-and-a-half to three years before the state passes any sports-betting bill.

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Maine

State **Maine**
House of Representatives Democrat
 Senate **Republican**
Governor/Party Paul LePage - Republican

Legislative Summary

Legal forms of gambling include pari-mutuel wagering on horse races, the Maine Lottery, two casinos, and charitable gaming. State law permits Maine's four federally recognized tribes to conduct high-stakes bingo games with unlimited prize values. However, there is no law under consideration regarding sports-betting at the current time.

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Massachusetts

State **Massachusetts**
House of Representatives Democrat
 Senate **Democrat**
Governor/Party Charlie Baker - Republican

Legislative Summary

In January Massachusetts state senator Eileen Donoghue proposed a bill looking to permanently legalise daily fantasy sports in the state, which would also allow for sports-betting as well. The bill includes a section that creates an eight-person special commission to "conduct a comprehensive study and offer proposed legislation relative to the regulation of online sports-betting" if the Supreme Court deemed any part of PASPA unconstitutional. The commission would be charged with making recommendations within 120 days of the court's decision. The Gaming Commission has already laid out issues for lawmakers in a White Paper published in March. After the Supreme Court ruling Democratic State Senator Eric Lesser said a consensus was growing among lawmakers that the legislature needs to move quickly on the issue. In June, the House Chairman said that the "potential game plan" is for the House to research the issue now so it can act in early 2019. However, how sports-betting would be regulated is still unclear as are the government's plans when it comes to online gaming. Either way legalised sports-betting will almost certainly be approved.

In June the House Chairman said that the "potential game plan" is for the House to research the issue now so it can act in early 2019. However, how sports-betting would be regulated is still unclear as are the government's plans when it comes to online gaming.



Maryland

State **Maryland**
House of Representatives Democrat
 Senate **Democrat**
Governor/Party Larry Hogan - Republican

Legislative Summary

Bill 1014, which would allow sports wagering at Maryland Casinos and Racetrack, easily passed the lower House in March. The legislature does not come back into session until January. The bill still needs to be approved by the Senate, the governor, and voters in a referendum. Most of the state's neighbours have sports-betting laws pending. The governor supports the debate, which means it likely that the bill would get on the ballot in 2020.

Most of the state's neighbours have sports-betting laws waiting. The governor supports the debate which means it likely that the bill would get on the ballot in 2020.



Minnesota

State **Minnesota**
House of Representatives Republican
 Senate **Republican**
Governor/Party Mark Dayton - Democrat

Legislative Summary

Sports-betting legislation has not been formally introduced although Rep. Pat Garofalo, has been pushing for legal sports betting in Minnesota. The Native American tribes have long opposed expansions on gambling and Garofalo said he wants American Indian gaming interests to be taken into account. There is likely to be strong opposition. The Minnesota Indian Gaming Association said that consideration of the sports-betting issue would probably take place in 2019.

There is likely to be strong opposition. However, the Minnesota Indian Gaming Association said that that consideration of the sports betting issue would probably take place in 2019. Minnesota's gaming market is heavily focused on the 19 casinos and two racetracks are located on Native-American reservations. Lawmakers have tried to change this by approving a state-owned casino, but it's yet to happen. It's estimated that tribal casinos earn over \$10 billion in annual revenue, but they don't pay state taxes. Instead, the money has gone towards building schools, hospitals and fitness centers on the once-struggling Indian reservations.



Michigan

State **Missouri**
House of Representatives Republican
 Senate **Republican**
Governor/Party Rick Snyder - Republican

Legislative Summary

Michigan is planning to change an online betting bill passed by the House of Representatives earlier this year to incorporate sports-betting. The National Indian Gaming Association (Michigan currently has 23 Native American casinos) has already come out in support of the legalisation of sports-betting meaning that it is a distinct possibility in the near future.

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Mississippi

State **Mississippi**
House of Representatives Republican
 Senate **Republican**
Governor/Party Phil Bryant - Republican

Legislative Summary

Mississippi, was the fourth state in the country to allow legalised sports-betting. The state passed legislation for legalised sports-betting in 2017 should the federal law be repealed. In August, two Mississippi resorts held simultaneous events to usher in the era of legal sports wagering. However, Mississippi will not have online and mobile wagering state-wide. Online sports-betting will only be allowed on the property of a casino sportsbook.

The state passed legislation for legalised sports-betting in 2017. In August, two Mississippi resorts, held simultaneous events to usher in the era of legal sports wagering. However Mississippi will not have online and mobile wagering state-wide. Online sports-betting will only be allowed on the property of a casino sportsbook.



Missouri

State **Missouri**
House of Representatives Republican
 Senate **Republican**
Governor/Party Mike Parson - Republican

Legislative Summary

Unlikely to get a bill passed this year, but consensus likely to be reached in 2019. One bill, which was put forward by Sen. Caleb Rowden, would allow sports gambling to occur on "excursion gambling boats" or areas that are over water. Meanwhile another bill put forward by Rep. Dean Plocher would include an "integrity fee" of a 1 percent charge on all sports wagers.

Unlikely to get a bill passed this year but consensus likely to be reached in 2019. One bill which was put forward by Sen. Caleb Rowden, would allow sports gambling to occur on "excursion gambling boats" or areas that are over water.



Montana

State **Montana**
House of Representatives Republican
 Senate **Republican**
Governor/Party Steve Bullock - Democrat

Legislative Summary

There are no current plans to increase the scope of sports-betting in the state. Like Ohio, Montana enjoys "grandfathered" status under PASPA.

The Montana Legislature has authorised limited legal gambling in Montana. Poker, keno, bingo, and video line gambling machines are legal with a maximum \$2 bet and \$800 payout. Legal live games include: raffles, bingo, keno, panguingue, poker and shake-a-day. Sports pools, fantasy sports leagues and sports tab games are also legal. These are non-banking games in which players bet against and settle with each other rather than betting against and settling with the house.

Scientific Games has announced that it will partner with Caesars to provide its OpenBet sportsbook platform in New Jersey and Mississippi. Could you tell us more about this deal with Caesars as it is obviously a huge development in the industry? What will it entail for both companies going forward?

Keith O'Loughlin: Our partnership with Caesars signifies a bright future for both parties in the U.S. sports betting market. It's a pivotal deal, and we believe it will shape the gaming and betting landscape for years to come.

The deal with Caesars includes our OpenBet product suite in their regulated properties in New Jersey and Mississippi, along with a mobile solution, which just launched in New Jersey. We believe that the combined global reach of Scientific Games and Caesars will be a benchmark for industry experts—we want to set the stage for unparalleled success in the U.S., and Caesars is just the partner for it. We've already begun accepting bets at Caesars properties in New Jersey and Mississippi, so we already view it as a successful and lucrative partnership. Going forward, we plan to work with Caesars as the market evolves to better respond to player needs and continue improving our product.

Scientific Games' Digital division will power the Caesars properties. Could you tell us more about OpenBet sportsbook technology? So how does it work? What is it? And how it will work in New Jersey and Mississippi?

Keith O'Loughlin: OpenBet comprises many technologies that combine to form one powerhouse product that leads the sports betting market. It includes retail electronic point-of-sale terminals, self-service betting terminals, in-venue screen solutions and accompanying digital and mobile solutions.

Essentially, OpenBet is the system that keeps the sports betting operation running, processes the transactions, and offers up the bets to consumers. However, the end user doesn't experience OpenBet as a brand. Our technology operates under our customers' brands, so in the case of Caesars, a bettor never leaves a Caesars-branded environment, whether it be mobile or in-venue, to place a bet.



Keith O'Loughlin,
Senior Vice President Sportsbook, SG Digital

Do you think it possible that Scientific Games will operate in any other states in the United States? Are there any other agreements under discussion or on the way that you might be able to tell us about?

Keith O'Loughlin: While we can't comment on ongoing discussion with potential customers, we can say that we are very optimistic about the future of sports betting in the United States. Early adopters have shown that there are various viable sports betting models, and we believe that when those first-to-market states start seeing the benefits, other states will follow suit.

As the market matures, we maintain a strong commitment to regulated jurisdictions and stand ready to support operators wherever sports betting is legal. We are uniquely positioned to provide a robust and compliant solution to any sports betting operator who wished to open up an offering in the States.

A few states already have legislation in the works, so we think it's just a matter of time before we see widespread legalisation.

Scientific Games has the experience of working across various legislations and regulators across the States and this will stand us well in launching our sports betting offering across new states that open up.

Are there any unique challenges which the U.S. market might offer? If so, how will Scientific Games be able to meet these challenges?

Keith O'Loughlin: We have loads of experience in other markets like the U.K. and Australia, so we feel uniquely equipped to address the

specific challenges posed by the U.S. market. One obvious obstacle is the different tastes of the average U.S. consumer. In the U.K., football (soccer) reigns supreme. In the States, you have football, basketball, baseball, and hockey dominating the market. We want to be sure that Stateside bettors have an offering that matches their interests.

The U.S. customers also expect an unmatched experience from start to finish. If the solution isn't intuitive, we run the risk of losing them. So we're working diligently to ensure our mobile and in-venue solutions are seamless and simple. A great parallel can be found in the streaming world. A pop culture enthusiast can enjoy his favorite shows on Netflix literally anywhere—on the bus to work, at home, etc. That omni-channel experience is crucial to the U.S. consumer, and we aim to mirror that approach with sportsbook. Sports betting should be viewed as an entertainment channel, and thus, it should reflect the widespread availability of more seasoned channels. It's a big project, but it's worthwhile to keep the players happy!

Very generally speaking, how do you see the market going forward?

Keith O'Loughlin: It's a very unique market, and while its future isn't easy to predict, we do expect a few key shifts to come in the near future. Right now, speed-to-market is top-of-mind for operators, and the industry is flooded with providers that promise all sorts of bells and whistles in no time at all. As the market matures, we think the mindset will shift more toward reliability and performance. As the market matures, customers will want a lot of flexibility to be able to evolve and differentiate themselves to retain and maintain their customers. Speed will always be prevalent, but to survive in the long term, operators must have a solid, proven platform.

We also expect that, as the average bettor learns more and more, we'll see growth alongside that learning. It's a new ball game, and players will want to learn the ropes before diving headfirst into the world of sports betting. But when the entertainment value becomes apparent, we think new sports betting experts will emerge every day.

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Nebraska

State **Nebraska**
Nebraska Legislature Republican
Unicameral **Republican**
Governor/Party Pete Ricketts - Republican

Legislative Summary

The Nebraska State Constitution determines what forms of gambling are permitted or prohibited. The regulation of sports-betting looks unlikely in the short-term. Gov. Pete Ricketts, is strongly opposed to any plans to change Nebraska's law. Sports betting is illegal in Nebraska and 'we have no plans to change that,' he said.



Nevada

State **Nevada**
Assembly Democrat
Senate **Democrat**
Governor/Party Brian Sandoval - Republican

Legislative Summary

Legal since 1931.

Kambi Group has signed a multi-year deal to provide its Sportsbook and technology to Rush Street Interactive. Could you tell us more about the deal? How will it help further Kambi's entrance and expansion into the US market?

Max Meltzer: The Rush Street deal is a very significant one for Kambi for a number of reasons. Firstly, they have a very good management team which understands the business and what it takes to succeed – they are aligned with Kambi and our strategy, so it makes for a powerful partnership. Secondly, having a retail presence is important when looking to gain market access – those with the bricks and mortar businesses holding the key to operators and suppliers gaining a license. Third, Rush Street is familiar with the online market having launched its Sugar House brand online in New Jersey with great success – they know how customer acquisition, retention, onboarding, marketing, etc. works – which is a good head start on some of the others entering this space.

Finally, Rush Street also has a very modern technology platform which now has the Kambi Sportbook integrated very deeply into it. Not only does this give Rush Street great autonomy over the sportsbook, enabling to mould it to its individual needs, but it has created a full sportsbook and gaming turnkey solution which could be leveraged by operators in other states. We launched our Sportsbook with Rush Street through its Sugar House brand in New Jersey at the end of August and the results so far have been very encouraging. We look forward to doing similar in other states.

Regulation is likely to vary greatly from state to state so how will Kambi's business and technology fit into state-by-state regulation of



Max Meltzer,
Chief Commercial Officer, Kambi

sports betting. Will it be able to suit different regulations in different states and if so how?

Max Meltzer: Varying regulations across America is simply a reflection of what we see, and have dealt with effectively, in Europe and further afield. Kambi is active in regulated markets across the globe, covering six continents, so we are confident our technology can handle whatever state regulations throw at us. As an example, earlier this year we launched three different customers into three different regulated markets within the space of a week. This was possible due to our clean and flexible technology, as well as our corporate probity, which enables us to gain licences quickly and without issue to enter new markets. Coming back to the US, Kambi's ability to handle differing regulations is one of the key reasons why we were first to launch in the New Jersey online market, helping our customer take that first historic bet, and then a million more before others had even entered the market.

How will Kambi's sports betting services appeal to American sports enthusiasts in particular? So how will its high-quality Sportsbook be different from its offering in other countries than the U.S.?

Max Meltzer: To start, Kambi has a deep passion for US sports, which I believe feeds in to the quality of service and the markets we offer. Our meeting rooms are named after US sports stadia, our exec team is essentially full of US sports fans, and our traders and product developers bet on the games themselves so understand the sports and the markets players would want to bet on. Having this passion and experience means we already had a leading US sports wagering offer long before PASPA was repealed for our customers across the world but obviously, since that decision, we have made the service even more superior to exceed the demands of the US-based bettor.

These improvements included expanding the scope of our offer, building out our in-game product so players can, for instance, bet on result of next batter, the outcome of next drive, or the points of next throw, localising the sportsbook for the US-player, etc. We've also begun to innovate in the US. The fact there hadn't previously been legal single-game sports betting outside of Nevada means there has been a lack of innovation and modernization of the betting product as a whole. One example is teaser parlays, where operators have historically priced using an odds table as they never used to price up more than one line. As Kambi prices a wider variety of lines on the same game, we didn't see the point in using an odds table when we can just as easily give bettors the right and fair price of their teased parlay – which just happens to give greater value too. Hence Teaser+ being born, which is already proving an effective point of differentiation for our partners. On the whole, our Sportsbook has been well received in new Jersey with DraftKings, Rush Street/Sugar House and 888 all performing to or beyond expectations.



New Jersey

State	New Jersey
General Assembly	Democrat
Senate	Democrat
Governor/Party	Phil Murphy – Democrat

Legislative Summary

In 2011, New Jersey residents voted by a 2 to 1 ratio to legalise sports-betting. In the same year, arguing that state regulated sports-betting would raise tax revenue, create jobs, attract additional revenue from tourism, reduce illegal gambling and help the local gaming industry, New Jersey amended its constitution to allow for sports-betting. In January 2012 governor Chris Christie signed the measure into law allowing for sports-betting at racetracks and casinos in the state. The state of New Jersey had been battling it out in the courts against the major professional sports leagues that sued then-Governor Chris Christie in 2014 to stop him from allowing legal sports-betting at Atlantic City casinos and the state's racetracks. In May, the Supreme Court struck down the federal law that had barred single-game gambling in most of the country, saying it unconstitutionally forced states to maintain their prohibitions.

The state of New Jersey had been battling it out in the courts against the major professional sports leagues that sued then-Governor Chris Christie in 2014 to stop him from allowing legal sports betting at Atlantic City casinos and the state's racetracks.

Tell us about the Inspired virtual games, which were brought to the New Jersey market before the Supreme Court decision?

Brooks Pierce: In late 2017, Inspired's Virtual Sports went live online in New Jersey, making it the first and only virtual sports provider in the State. The Division of Gaming Enforcement at New Jersey was able to certify our content using existing RNG content regulations and we were thrilled to place Virtual Sports in familiar betting markets in the fast-growing New Jersey market ahead of broader sports regulation. Inspired is now live with six operators, with further launches expected.

Will Inspired operate in other states in the US? Are there any agreements under discussion you can tell us about?

Brooks Pierce: Inspired recently launched a new range of virtual sports games designed specifically for the US lottery market, which are available through the Pennsylvania State Lottery and are available in more than 9,000 retail locations. The simple game play and win-picking features are similar to traditional lottery products, but introduce a new style of lottery with more immediate impact. Pennsylvania lottery players no longer have to wait for a nightly drawing, as these new virtual sports games are drawn every five minutes.

With our virtual sports content already in Nevada and New Jersey, we have many other US



Brooks Pierce,
President and CEO, Inspired

lotteries and casinos speaking with us about launching similar products across their retail, casino, sportsbooks and interactive platforms. US providers see our products as an opportunity to expand their player base, as a precursor to sports betting, and as a way to add fresh, dynamic content to their gaming portfolio with a proven record of driving incremental revenues for customers globally.

Also with the recent Supreme Court ruling favoring sports betting, we've seen a surge in interest in the US for our virtual sports content. Our virtual sports content is seen as complementary and seamless to real world sports betting and has proven to drive incremental revenues for customers globally and attract new players, as the digital format mimics the type of entertainment that millennials already consume. Empirically, operators who have added virtual sports to an existing sportsbook have experienced a 25 percent increase in revenue.



New Hampshire

State	New Hampshire
House of Representatives	Republican
Senate	Republican
Governor/Party	Chris Sununu – Republican

Legislative Summary

Pro-sports betting laws are likely in 2019 with momentum gathering for legalised sports-betting. The head of New Hampshire's state lottery said that it is ready to oversee sports-betting should the government give it the go ahead. Meanwhile, Gov. Chris Sununu says he supports the idea of sports-betting in New Hampshire.

The head of New Hampshire's state lottery said that it is ready to oversee sports-betting should the government give it the go ahead. Meanwhile Gov. Chris Sununu says he supports the idea of sports-betting in New Hampshire. Despite the blanket ban on casinos, New Hampshire is home to hundreds of blackjack, craps, roulette, and poker tables. Circumventing harsh gambling prohibitions, New Hampshire authorises games of chance to be played on behalf of charitable organisations. Nearly 400 charities have gotten in on the games, linking up with clubs, poker rooms, and former racetracks to create small-scale casino venues.

Is Inspired looking at developing any new virtual games specifically for the US market?

Brooks Pierce: Inspired invested heavily in research and development and took eighteen months to create the first products designed specifically for the US lottery player: Xpress Football and Xpress Car Racing, as branded by the Pennsylvania Lottery. We used the world's most advanced motion capture facilities to produce ultra-realistic animation that would generate a true depiction of a football game that we knew lottery players would embrace. The player models were developed in ultra-high resolution including facial rigs and muscle systems, allowing for the use of super close up cameras (for the first time), which ensure that we can go right in the middle of the action.

We brought in a former Super Bowl champion player in order to create the most realistic football product possible. He was highly involved in the making of the game, providing direction during the motion capture process and reviewing the game throughout development to help create a true-to-life final product that accurately reflects the way modern football is played.

Pennsylvania is the first major US lottery to launch with Inspired's Virtual Sports at retailers across the state, and the Xpress Football and Xpress Car Racing games offer their players a new way to play and win, with ultra-realistic, high-quality graphics and animation.



New Mexico

State	New Mexico
House of Representatives	Democrat
Senate	Democrat
Governor/Party	Susana Martinez – Republican

Legislative Summary

State lottery officials may look at expanding gaming options tied to sports, but plans are at a very early stage. The Lottery Authority is exploring the opportunity to offer new lottery games tied to sports results. The main issue for a further expansion revolves around compacts between the legislature and the state's recognised Native American tribes, which operate more than two-dozen of the state's casinos.

State lottery officials may look at expanding gaming options tied to sports but plans are at a very early stage. The Lottery Authority is exploring the opportunity to offer new lottery games tied to sports results. The main issue for a further expansion revolves around compacts between the legislature and the state's recognised Native American tribes.



North Carolina

State	North Carolina
House of Representatives	Republican
Senate	Republican
Governor/Party	Roy Cooper – Democrat

Legislative Summary

Currently, gambling in North Carolina is limited to a state-wide education lottery and one casino. The majority of lawmakers are against gambling and it is therefore unlikely in the near future. However, some insiders believe that it could be possible in around five years as sports betting would provide more revenue. Additional pressure could come from Harrah's Cherokee Casino Resort. In May Richard Sneed head of the Eastern Band of Cherokee Indians said talks already have taken place about that possibility of allowing sports betting in the Harrah's Cherokee Casino Resort.

In May, Richard Sneed, head of the Eastern Band of Cherokee Indians, said talks already have taken place about that possibility of allowing sports betting in the Harrah's Cherokee Casino Resort.



New York

State **Maine**
Assembly Democrat
 Senate **Republican**
Governor/Party Andrew Cuomo – Democrat

Legislative Summary

In the state of New York, lawmakers approved language in 2013 that would allow wagering on athletic events if the federal ban on sports wagering was overturned. The Democratic-controlled Assembly is divided on the matter, but there is bipartisan support in the state Senate. According to Governor Andrew Cuomo it could take some time and the Legislature ended its session early June 21 without making a decision. Bills in both houses are almost identical and would allow for betting on sports at the state's already existing gaming facilities. Mobile sports-betting would also be permitted. The New York State Gaming Commission is expected to issue regulations for brick-and-mortar sports-betting in September, and then there will be a 60-day vetting of the rules.

According to Governor Andrew Cuomo it could take some time and the Legislature ended its session early June 21 without making a decision. Bills in both houses are almost identical and would allow for betting on sports at the state's already existing gaming facilities.



Ohio

State **Ohio**
House of Representatives Republican
 Senate **Republican**
Governor/Party John Kasich – Republican

Legislative Summary

Legislators are beginning the process of legalising sports gambling with the introduction of two bills in the Ohio House of Representatives and Senate. Both would legalise sports-betting in 2019. Both bills, which use the same language, for now only express the state's intent to legalise sports-betting in the state.

Legislators are beginning the process of legalising sports gambling with the introduction of two bills in the Ohio House of Representatives and Senate. Both would legalise sports betting in 2019. Both bills, which use the same language, for now only express the state's intent to legalise sports betting in the state. Pari-mutuel betting on horse racing, including remote betting and prior-deposit options is already legal.



North Dakota

State **North Dakota**
House of Representatives Republican
 Senate **Republican**
Governor/Party Doug Burgum – Republican

Legislative Summary

State lawmakers may tackle the issue when they meet again early next year, but it's unclear how much support sports gambling will have in the Legislature. All the same, there are a number of ways forward. North Dakota tribes may already have the authority to operate sports gambling operations as compacts allow for "sports book except as prohibited by the Professional and Amateur Sports Protection Act." Another route could be for state lawmakers to pass legislation allowing sports betting under the existing charitable gaming laws, while a constitutional amendment, could be put forward which would require a successful ballot.

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Oregon

State **Oregon**
House of Representatives Democrat
 Senate **Democrat**
Governor/Party Katie Brown – Democrat

Legislative Summary

Oregon had "grandfathered" status under PASPA. While PASPA was passed in 1992 it excluded a few states making exceptions for sports lotteries in Oregon, Delaware, and Montana which were already present, and licensed sports pools in Nevada which already had authorised full-scale sports betting prior to PASPA's enactment. The Oregon Lottery Commission already has the remit to institute news games. The state is working toward real sports-betting by 2020.

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Oklahoma

State **Oklahoma**
House of Representatives Republican
 Senate **Republican**
Governor/Party Mary Fallin – Republican

Legislative Summary

Very likely to be discussed in the 2019 legislative session. Oklahoma's Native American tribes could be allowed to offer sports-betting exclusively via changes to already existing compacts.

Unlike many States, which target the organisers of illegal gambling games, Oklahoma also has specific statutes criminalising players. This State makes the bet the subject of criminal proceedings as well as outlawing gambling devices (broadly defined) and profiting from the games via rake or fees. While the bet legislation focuses on games of chance, poker is covered under a separate list of illegal gambling games. Players can currently bet on horse races (pari-mutuel betting) either at racetracks or remotely. Slots machines and racetracks have been combined in Oklahoma into popular racinos.

The relationship between the USA and European has always been a close one, even before NATO was formed in 1949. At any world leader event there is the usual customary public appreciation from both sides and in the case of the UK the relationship is even considered as "special". However out of the public eye most people will grudgingly admit that Europe needs the US a lot more than it needs them.

However where online gaming is concerned the situation is currently a little different.

The repealing of PASPA was the single biggest change in the online gambling market since UEGA back in 2006. Back then the US online market gambling was heavily dominated by European players before it became illegal and it seems that 12 years on as the market now really does start to open up US land based operators will still heavily rely on European ones to provide service to their home grown player base.

The gold rush is most definitely on with new deals being struck on a daily basis as everybody tries to stake their claim. The unreadiness of most land based operators for the repealing of PASPA is quite apparent, with many three way deals being done whereby a US operator needs a vendor for sports betting software and but also need an established operator to run operations and marketing for them.

There are a lot of deals to choose from but take the 10 year deal between GVC/Ladbrokes Coral and MGM for instance. Whilst on paper this



Pennsylvania

State **Pennsylvania**
House of Representatives Republican
 Senate **Republican**
Governor/Party Tom Wolf – Democrat

Legislative Summary

Pennsylvania is likely to be on the forefront of any possible expansion for sports-betting under current rules. In October 2017, state governor Tom Wolf signed a law which would allow casinos in the state to allow for mobile and online games including online poker, table games and slots as well as sports-betting in casinos on both professional and college sports in casinos. The law calls for a \$10 million application fee and a 34 per cent tax on gross sports wagering revenue. In August The Pennsylvania Gaming Control Board approved a set of regulations. Officials believe they are now ready to accept applications from casino operators. While operators have been critical of the 34 percent tax, many of the 13 potential licensees are likely to get on board.

In October 2017, state governor Tom Wolf signed a law which would allow casinos in the state to allow for mobile and online games including online poker, table games and slots as well as sports-betting in casinos on both professional and college sports in casinos.



Steven Valentine,
 Director of Interactive, Comtrade Gaming

Nobody can blame the operators for their haste to get into the market and they simply don't have the operational experience to do it themselves, only time will tell how successful each partnership is. However as the major US players gain more experience and the market starts to mature it is likely to expect that they will want to take more control of their own operations and a bigger piece of what is after all their own pie.

looks like a smart move and definitely a bold one for both companies but with the US market being in its infancy it will be interesting to see if the deal is working well for both sides in three years' time let alone ten. The last time GVC signed a ten year deal was with Betfred and that fell apart before the ink was dry.

There is a tried and tested formula in Europe where by mid to large sized operator's partner with a vendor for their tech or perhaps the largest build the tech themselves, but the operational side of the business is always kept

in-house and is seen as one of biggest ways how to differentiate from competitors. In the past some of have tried outsourcing operations, normally in times of crises, and although these started well and provided a much need to kick to the share price at first over time most ended with fairly spectacular and expensive separations.

For the mature European competitive markets the player experience is absolutely key, state of the art player account management software is critical and the push for a true omni-channel strategy continues for those with a land-based and online presence. In this very early stage of the US market no doubt many of these elements are being overlooked due to the rush just to get a deal done and be online as fast as possible.

Nobody can blame the operators for their haste to get into the market and they simply don't have the operational experience to do it themselves, only time will tell how successful each partnership is. However as the major US players gain more experience and the market starts to mature it is likely to expect that they will want to take more control of their own operations and a bigger piece of what is after all their own pie.

The rhetoric from the current US administration represents a change from the norm where Europe is concerned and they have now been very vocal about their unhappiness with NATO and the fact they feel Europe is not pulling its weight. It will be interesting to see in a few years' time if US operators feel the same way about their online operating partnerships.



Rhode Island

State **Rhode Island**
House of Representatives Democrat
 Senate **Democrat**
Governor/Party Gina Raimondo – Democrat

Legislative Summary

The Rhode Island Governor has already signed a bill that legalises sports-betting and gives the state 51 percent of the revenues from wagers. There are currently no plans for online wagering. The Rhode Island Lottery will operate sports-betting in the only two licensed gaming establishments via third parties in addition to existing games of chance. Sports-betting is expected to go live by mid-November.

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South Carolina

State **South Carolina**
House of Representatives Republican
 Senate **Republican**
Governor/Party Henry McMaster – Republican

Legislative Summary

The majority of conservative South Carolina is opposed to gambling and it could take years for the state to legalise sports-betting. Even if it did gather enough support it would require amending the state's constitution. Support would probably not be forthcoming in the largely conservative state and Gov. Henry McMaster has been a long time opponent of gambling in South Carolina. However, there is growing support for sports-betting. Two bills in the state's legislature this year called for legalising sports-betting, but expired when the legislative session ended in May. Despite this the situation in the state is unlikely to change and it is unlikely that the state will make any changes to its sports-betting laws for several years.

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South Dakota

State **South Dakota**
House of Representatives Republican
 Senate **Republican**
Governor/Party Dennis Daugaard – Republican

Legislative Summary

An amendment to the state's constitution would be necessary, which would eventually be decided in a ballot. A state constitutional amendment could be placed on the 2020 general election ballot or by the State Legislature in 2019 or 2020. Locally there is support for the liberalisation of gaming laws. Casinos could lead the drive to propose a constitutional amendment on South Dakota's 2020 ballot.

To allow sports-betting an amendment to the state's constitution would be necessary, which would eventually be decided in a ballot. A state constitutional amendment could be placed on the 2020 general election ballot or by the State Legislature in 2019 or 2020.



Tennessee

State **Tennessee**
House of Representatives Republican
 Senate **Republican**
Governor/Party Bill Haslam – Republican

Legislative Summary

The state does not have any casinos or racetracks and gaming is currently limited to a state-wide lottery and fantasy sports. Broadly speaking there is very little consensus on the issue. While a number of lawmakers have said that they would like to see a constitutional amendment, according to member of the State Senate, Senator Brian Kelsey, a supporter of sports betting, any move to legalise sports-betting in the state it would be "a tough legislative battle."

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Texas

State **Texas**
House of Representatives Republican
 Senate **Republican**
Governor/Party Greg Abbott – Republican

Legislative Summary

Conservative politicians have repeatedly stated opposition to any new law. Neither Gov. Greg Abbott nor the Legislature would support legalisation of sports-betting in Texas. Prohibition is likely to continue for years as the Legislature would probably need to propose a constitutional amendment. This would require the approval of two-thirds of the members of both houses, followed by a referendum which would probably not garner much support.

Neither Gov. Greg Abbott or the Legislature would support legalisation of sports-betting in Texas. Prohibition likely to continue for years as the Legislature would probably need to propose a constitutional amendment. Texas gambling laws are relatively strict and only allow residents and visitors to bet on horse racing and greyhound dog racing. Some exceptions to the rule include "social gambling" (such as office pools), bingo, and charitable raffles. As a rule of thumb, betting on games of chance (other than horse or dog racing) is prohibited in Texas.



Utah

State **Utah**
House of Representatives Republican
 Senate **Republican**
Governor/Party Gary Herbert – Republican

Legislative Summary

Utah is one of two states that currently outlaws all forms of gambling. The prohibition is likely to remain place for the near future.

Although other states have begun to relax their gambling statutes, permitting Indian casinos and other gaming venues like card rooms, certain types of gaming and gambling are still illegal under state gaming statutes. Utah's gambling laws prohibit citizens from betting anything of value on the outcome of a contest, game, scheme, or gaming device.



Vermont

State **Vermont**
House of Representatives Democrat
 Senate **Democrat**
Governor/Party Phil Scott – Republican

Legislative Summary

Gambling is very restricted in Vermont and there are no state-licensed or tribal casinos and gaming houses are prohibited by law. The state bans gambling activities, the possession of gambling equipment including slot machines, and efforts to organise gambling in a place of business or elsewhere. The major exception is for non-profit organisations, which are permitted to hold lotteries, raffles and other games of chance. There is very little impetus when it comes to allowing sports-betting, especially due to the lack of already existing locations where sports-betting could be present. Gov. Phil Scott is undecided on the issue and the Vermont Legislature has no pending bills related to sports gambling, and legislative action seems unlikely in the near future.

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Virginia

State **Virginia**
House of Delegates Republican
 Senate **Republican**
Governor/Party Ralph Northam – Democrat

Legislative Summary

Sports-betting legislation is at a very early stage. However, rumours are circulating that the state could try to approve legal sports-betting at next year's legislature.

Virginia gambling laws are relatively restrictive, and generally define gambling as betting on the outcome of any games or contests that depend on chance. While casinos and greyhound racing are specifically prohibited, the state allows horse racing and off-track betting at licensed facilities. Virginia also allows charitable gambling.



Washington

State **Washington**
 House of Representatives Democrat
 Senate Democrat
 Governor/Party Jay Inslee - Democrat

Legislative Summary

In a statement, the Gambling Commission's said that they are currently reviewing the Supreme Court's decision in order to determine its full impact on the state and its authority to enact its sports-betting laws. In order to change sports-betting laws Washington State Gambling Commission would require a two-thirds majority in the Legislature or a referendum. Tribal interests in casinos are key.

In order to change sports-betting laws Washington State Gambling Commission would require a two-thirds majority in the Legislature or a referendum. Tribal interests in casinos are key. Washington gambling laws allow licensed casinos on Indian reservations only, while also allowing licensed horse racing and certain games used to raise funds for charitable organisations. Bracket pools, office sports pools, and fantasy sports have never been authorised as gambling activities in Washington State and are considered illegal.



Wisconsin

State **Wisconsin**
 Assembly Republican
 Senate Republican
 Governor/Party Scott Walker - Republican

Legislative Summary

The governor of the state is against allowing sports-betting. Changing the law could take years as it could require changes to the state constitution, meaning a bill would have to pass the Assembly and the Senate in two consecutive sessions, and it would then need to go through a referendum. However, state compacts with tribes could be changed to allow for sports-betting in larger casinos in the state.

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West Virginia

State **West Virginia**
 House of Delegates Republican
 Senate Republican
 Governor/Party Jim Justice - Republican

Legislative Summary

In March, the Governor of West Virginia, Jim Justice, signed into law the West Virginia Sports Lottery Wagering Act legalising sports-betting, pending the outcome of Murphy v NCAA in the Supreme Court. Casinos are permitted to offer sports-betting and can partner with third-parties to develop sports-betting lounges and to develop sports-betting apps. Online and mobile bets will only be accepted from players physically located inside the borders of West Virginia. Revenue generated from the wagering activity is set to amount to 10 per cent of their gross gaming revenue. The first sportsbook to accept sports wagers officially launched at the end of August.

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Wyoming

State **Wyoming**
 House of Representatives Republican
 Senate Republican
 Governor/Party Matt Mead - Republican

Legislative Summary

All casinos in Wyoming are operated by Indian Tribes. Likely in the next five years.

Wyoming has only recently allowed casino gaming after being over-ruled by Federal judges concerning the state's refusal to negotiate compacts with tribes. There are restrictions on most forms of gambling, even those which are legal, and concessions appear hard to obtain through the legislature. There are limited options for betting on horse racing through charities and lotteries.

Sportech will launch a new fixed odds sports betting platform in the United States following an agreement with Sportradar. Under the agreement, Sportech will be able to offer Sportradar's trading and risk management services for sports betting to licensed operators in the country. Would you be able to tell us any more about that deal and what it could mean for the emerging US market?

Neale Deeley: As legislation unfolds across the country it appears likely that in many states the horseracing operators will have the ability to offer fixed odds sports betting. Sportech already has a vibrant B2B business providing pari-mutuel wagering services to many of these operators. Our agreement with Sportech will allow us to bring a high-quality sports betting service to those operators.

Are there any states in particular where Sportradar could soon offer its sports betting services in the near future?

Neale Deeley: We supply data and services to most operators so we are already live in states like New Jersey, Nevada and Mississippi. We have been preparing for the market opening in the US for a number of years and we will be ready to offer our services to operators in each and every state as they open for business. We can't predict the speed of roll out across the states but we can be sure we will be ready.

Many companies will want to grow into being a sportsbook operator now that the decision is in. How will Sportradar be able provide solutions to US-facing operators on a state-by-state basis?



Neale Deeley,
VP, Sales, Gaming, Sportradar

Over the next 5 – 10 years the US will emerge as one of the largest markets for sports betting in the world. It will be a market dominated by US sports that will trigger innovation in betting that supports the more statistics led stop start style of play these sports have. Whatever happens, it's going to be a fun ride.

Neale Deeley: Flexibility will be the key. Because we have the full capability across our business, we can offer operators the suite of necessary sportsbook elements to get up and running, all the way up to a full turnkey solution. We are already building up experience in various states that are already live so we are attuned to the needs of compliance with state regulations.

Obviously, this is an exciting time with big changes on the way. I read in a recent Forbes piece that Sportradar is "The Pick And Shovel Maker Of Sports Betting." Is that a fair assessment of how the company will operate in the US now that the sports "gold rush" is on so to speak?

Neale Deeley: Yes, it is very much the case that we hope to supply the tools needed by operators to fully take advantage of the sports-betting opportunity. That ranges from our award-winning components, such as the best sports data, the most comprehensive odds models or a fully risk-managed sportsbook - a flexible solution is readily available.

While the picks and shovels analogy may be a little outdated, it does hit the key point that we have been building up a US market ready portfolio of services that operators can utilize to underpin their own success.

Where the analogy falls down is that in history the picks and shovels guys didn't really care if their customers were successful. In this 'gold rush' we only win if our customers win.

Very generally speaking, how do you see the market going forwards?

Neale Deeley: We are, obviously, very optimistic about the potential for the US sports-betting market. The speed things will happen and the inevitable bumps on the journey as states pass legislation will no doubt create many talking points but overall the direction of travel is clear.

Over the next five – 10 years the United States will emerge as one of the largest markets for sports betting in the world. It will be a market dominated by US sports that will trigger innovation in betting that supports the more statistics led stop start style of play these sports have. Whatever happens, it's going to be a fun ride.

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