



**EA Intel**  
Report 2021

**Sports betting**



- Kiron Interactive
- Pronet Gaming
- Scientific Games
- Sporting Solutions

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*Introduction*

# An unprecedented time

**T**his past year was without a doubt an unprecedented, challenging one in the igaming industry because of the coronavirus pandemic. However, the year also presented opportunity, as is well evidenced in the contributions featured within the report.

With bricks-and-mortar betting shops shuttered, punters moved online. In step with this trend, along with the absence of Premier League football for much of the season, providers had to respond. Different markets and events still taking place came to the fore and virtual sports proved an invaluable part of operators' sportsbooks.

Savvy operators have taken the opportunity throughout this time to rethink their offerings and this report serves as a testament to the resiliency and innovative spirit of the igaming industry.

By Ross Law | **Report editor**

Featuring: *Pronet Gaming*

# Has coronavirus changed betting behaviour?



## Thomas Molloy

◆ Sportsbook and trading director  
◆ Pronet Gaming

Thomas Molloy is sportsbook and trading director at Pronet Gaming. With a wealth of knowledge in product management, risk management and sports trading, Molloy has over 15 years' experience working for both established businesses and start-up ventures in both B2B and B2C environments. Before joining Pronet Gaming in July 2019, he held the position of head of sports at Tabcorp and has also held leading roles for Sportradar and Betway, among others.

Thomas Molloy of Pronet Gaming looks at the changes seen in football betting behaviour since the coronavirus pandemic emptied out stadia across the world

The date 11 March 2021 marked a year to the day since Atlético Madrid knocked champions Liverpool off their perch and out of the Champions League. What none of us knew then was that this game would be the last to take place in front of a full and baying crowd. What followed was a significant mid-season break, a host of safety stipulations put in place and empty stadia followed by fans sitting in front of their screens watching with pre-recorded crowd noise to improve the experience. It was always unlikely that football would return with its usual pizzazz.

Now 12 months on, we are well into the 2020/21 season and despite the very different environment that players are still performing in, we are able to look back and reflect on what, if any, differences are evidenced in betting behaviour and what that means for sportsbooks worldwide.

What was really fascinating about the return of the Premier League in particular was the initial way in which the trends around bets shifted after the resumption in June 2020. Here at Pronet Gaming, we kept a close eye on how the new conditions affected play on the pitch and, in turn, how gamblers were placing wagers.

What was clear was that teams struggled to pick up where they left off before the lockdown. Many who were safe from relegation appeared to be playing the season out. This resulted in fewer goals, fewer shots and a lower conversion rate of chances to goals. With the exception of Serie A, which bucked the trend, this was the case across all of the big European leagues. Over 70% of goals were scored in the second half of games, indicating that the extended hiatus may have had more of an

impact on match fitness than some previously envisioned.

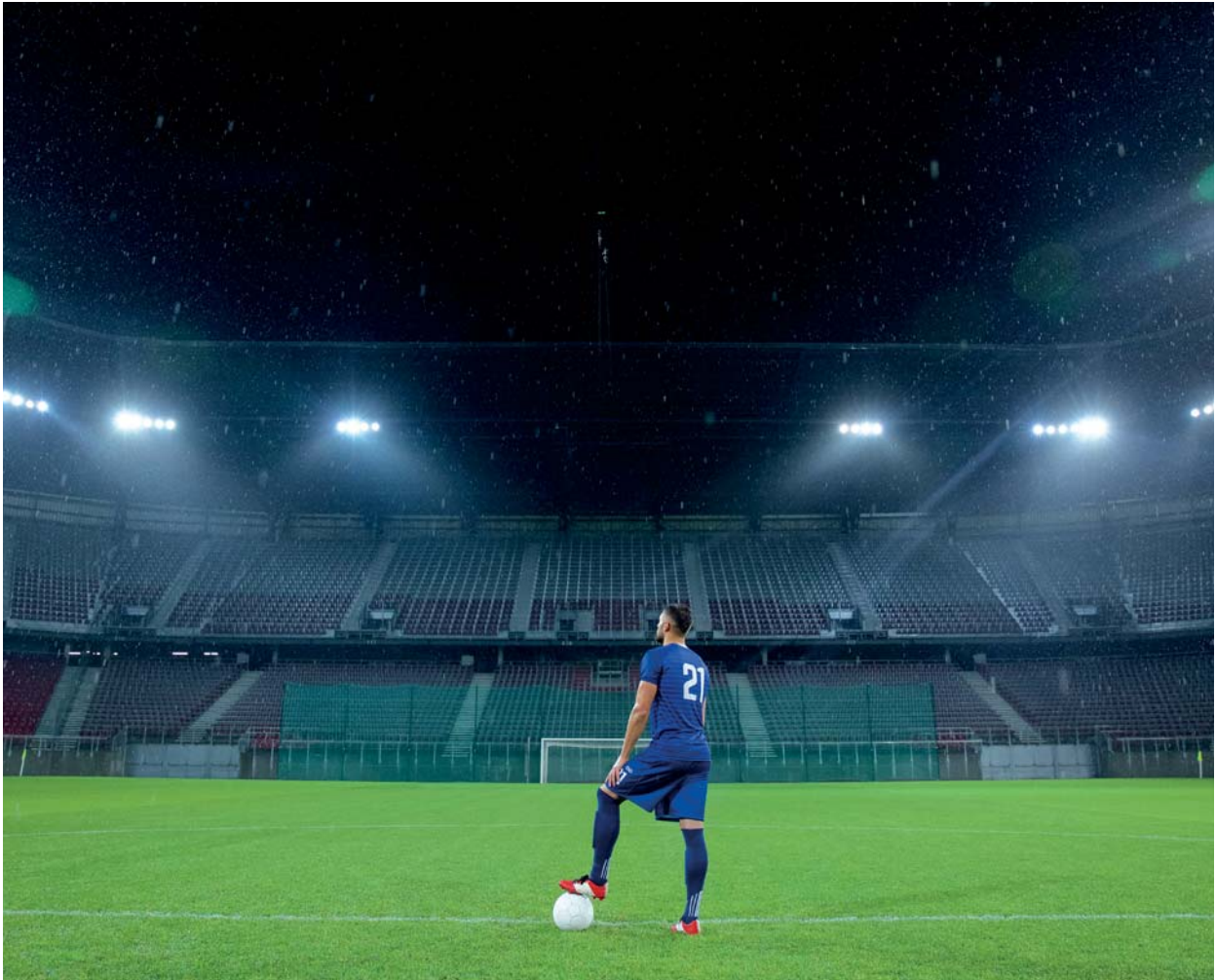
Football is a game in which teams thrive in a febrile atmosphere. Our early prediction that an absence of cheering fans would affect player performance initially proved accurate, with Premier League home games as close to being played on neutral ground as they could be. We anticipated last season's games would be more likely to be cagey as a result, and that certainly rung true, with 58% of matches proving to be goalless at half time as opposed to just 29% before lockdown.

Reflected today, those numbers are in stark contrast. For Premier League in particular, average goals per game has risen from 2.72 in 2019/20 to 3.25 goals per game in 2020/21! What is also interesting is that this trend has been picked up by bettors, with Total Goals markets now the most popular on our platform, turning over more than the previous favourite 1X2.

*Football is a game in which teams thrive in a febrile atmosphere. Our early prediction that an absence of cheering fans would affect player performance initially proved accurate*

**Thomas Molloy | Pronet Gaming**

In contradiction, what we have also evidenced is how bettors, strong pull towards favourites and home teams hasn't changed, which has resulted in strong margins for our clients. According to research, the falloff in home advantage due to empty stadia was substantial once the 2019/20 season restarted and has become even more established in the current season, where it has all but disappeared on average across the top five European leagues. Average home point advantage per game before Covid was 0.48, but now sits in the region of 0.1! It's in-



teresting, when looking more closely into this, that home teams are scoring at broadly the same rate whereas away teams' average goal ratio has risen from 1.19 to 1.38 per game.

As these trends play out, we continually amended the logic around our models accordingly. This proactive approach has been paramount in helping our clients maintain consistent returns.

When it comes to the return of recreational bettors with no hidden agenda, many have picked up where they left off, with match accumulators, over goals and both teams to score remaining popular, but savvy bettors have picked up on the trends above, turning their attention and backing teams both to win away from home and score more heavily in doing so. Our traders and customer profiling

departments have proactively stayed ahead of the curve by ensuring our risks are properly managed across the lifecycle of the odds, from creation to settlement and everything in between.

What is clear is the importance of packed stadia and the old saying 'our fans are our 12th man' has rung true! Covid-19 has brought many questions with it in a betting sense but by staying nimble, proactive and by tailoring our offering at a local level, we have been able to ride this unprecedented year with a solid commitment to our clients.

All of us are hopefully closer to the end of the pandemic than the start and enjoying the solid performance so far in 2021. Normal service will hopefully resume once again but if it has not, we'll be prepared. ♦

## Online gaming industry intelligence and networking community, accessible wherever you are.

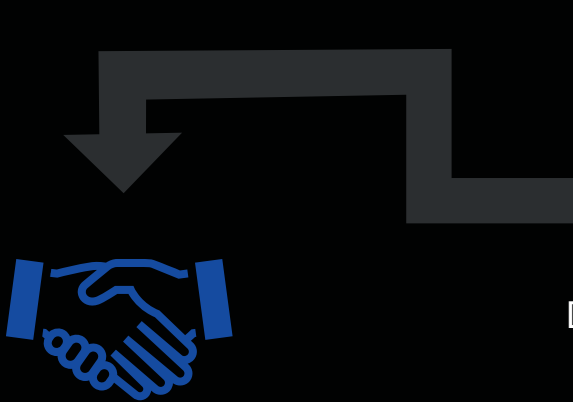
**EGR** is the leading intelligence and networking community dedicated to the online gaming industry. Whatever your role and its challenges, our specialist networks will give you the tools to improve customer acquisition and retention, benchmark against peers, comply with regulations and guide decision making.



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Data and performance and statistics



Market & Competitor Analysis



Featuring: *Sporting Solutions*

# What gives a sports betting operator the edge?

Ed Peace of Sporting Solutions highlights the value in operators' utilising technology

Comparing the sportsbooks of today can be comparable to a game of spot the difference. Most carry an almost identical offering, with big overlaps between competitors on aspects ranging from content and promotions to user experience and interface.

The trend is not only prominent in mature European markets, but also in the nascent sports betting states across the US, where habits from the old world have sailed across the Atlantic and firmly planted their flag. We believe both domestic and multi-national operators in mature and regulating markets require a deeper understanding of localised products, with a focus on differentiation through automation of the pricing and risk management functions in order to truly separate themselves from the competition.

With substantial compliance costs and regulatory constraints, the common one-size-fits-all approach often employed is no longer sufficient for operators to achieve sustainable profits. White-label solutions may have found a place in the grey markets, where there is a route to avoid tax and social responsibility costs, but the model is no longer viable in regulated territories.

## Data and pricing

Data carries a premium; the importance of player welfare has never been greater; licensing, technology and marketing costs have rocketed; and crucially, after an era when theoretical margins have declined, commoditised pricing has seen its time.

A belief that 'if everyone offers the same odds, they can't be wrong' has led to many operators copying prices for years – either directly or via a low cost 'pricing' supplier. The result is that price differentiation driven by expert management of actual

book exposure is now a missing piece in most operators' value chain.

By investing in a solution underpinned by expert pricing and risk management, operators can exploit this deficiency to differentiate their sportsbook. Differentiation through price provides an 'all too overlooked' opportunity to drive customer engagement. Price, after all, is a fundamental part of the marketing mix and sports betting is a consumer market like any other.

## Personalisation through analytics

The ability to personalise the sportsbook proposition through customer analytics is also vital for customer experience, maintaining competitive advantage and growing margins, but also in being more proactive in areas of safer gambling. This point is especially poignant today, where player protection has been at the forefront of the legislative agenda in the US and the subject of reviews in the United Kingdom and the European Union.

*Considering increased volume, enhanced margins, differentiated pricing, a stronger brand position and more consistent returns, opting for automation is a sure route to gain market share*

**Ed Peace | Sporting Solutions**

We're not talking of rudimentary analytics based on overly subjective and manual processes, either. These rarely go further than leveraging data on customer preferences to push targeted content and promotions. Instead, what's needed is a fully automated, integrated and intuitive analytics that keep up with the rapidly expanding scale of operations and appropriately accounts for the complex, dynamic and skill-based nature of sports betting.



## Ed Peace

◆ *Managing director*  
◆ *Sporting Solutions*  
Ed Peace is the managing director of Sporting Solutions, the premium supplier for odds provision, trading expertise and risk management services to sportsbooks around the globe. Since joining the company in 2013, Peace has worked in a range of commercial and leadership positions and is responsible for driving Sporting Solution's ongoing growth and development in the gambling industry.



Integrated alongside automated risk adjusted price management, this progressive approach allows operators to optimise their odds in real-time. The world of equities and hedge funds have long embraced automation of human expertise to improve volume and margins; and it's proven that these same benefits can be gained when applied to sports betting.

The adoption of econometric techniques, such as the workings of revealed preference theory, into risk management algorithms ensure profitable decision-making and consistently enhanced returns. It also provides a way out from the phenomenon of offering static, blanket odds scraped from other sports-

books that feed the void of differentiation. With odds which move progressively, in line with changes to liability and according to where the operator wants to position their brand in real-time, comes discernible market advantage.

While this may sound the death knell for manual trading services and operators who rely on them, for those who embrace automated risk adjusted pricing and enhanced customer analytics the benefits are huge.

Considering increased volume, enhanced margins, differentiated pricing, a stronger brand position and more consistent returns, opting for automation is a sure route to gain market share. ♦

Featuring: *Kiron Interactive*

# Virtuals: the perfect segue between sportsbook and casino

Steven Spartinos, co-CEO of Kiron Interactive, gives insight into the importance of virtuals in recent times

**EGR Intel (EGR):** What do virtuals offer operators that their existing sportsbook and casino products don't?

**Steven Spartinos (SS):** The tribulations of the last 12 months need little in the way of introduction in 2021. The hole left in many operators' product offerings thanks to the cancellation of live sport and the almost total closure of retail operations left a significant void in revenue. The surge in the already significant popularity of virtuals during this time has been a testament to the huge value of diversity in content offerings.

If the last 12 month's industry struggles taught us anything, it's that a varied product portfolio is not just nice to have, but essential.

The challenges faced during the sports vacuum have forced operators across the world to recognise virtual content as a stable and consistent income stream. In many of the strongest online markets, alternative virtual sports provided a lifeline to keep customers engaged in the absence of sports betting. The vertical succeeded in driving revenue, acquiring customers and retaining them over the long term. The challenge now is to maintain that momentum.

How have virtuals done this? Well, there are myriad factors that drive success for the genre, but the main ones are:

- ◆ Games available 24/7 with minimal downtime
- ◆ Thousands of daily events every 60-90 seconds
- ◆ Extensive games portfolios
- ◆ Games that can be customised and tailored to use the operator and their players
- ◆ Easy to bet across devices, online or retail
- ◆ Scalable platform architecture, servicing small to large enterprise-class operations
- ◆ Tier-one streaming environment with global low latency distribution

- ◆ Extensive betting markets replicating those in live sports
- ◆ 24 languages supported

**EGR:** How important is it for operators to position the vertical correctly among their product suite to ensure maximum benefits?

**SS:** Just like with any product, correct positioning is essential. Done accurately, it creates an image of virtual games in the mind of players, highlighting the most important benefits that differentiate the product from similar games in the market. By doing this, they can deliver maximum value to market while aligning and encouraging the best engagement with the product.

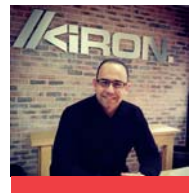
*Virtual sports will never replace live sports betting; however, it does offer the same bet markets as the live equivalent [...] If anything, virtual sports have become a strong game vertical in their own right, attracting a following of dedicated players*

**Steven Spartinos | Kiron Interactive**

**EGR:** To what degree are virtuals seen as a complement to live sport rather than a replacement as we have seen during the pandemic?

**SS:** Virtual sports will never replace live sports betting; however, it does offer the same bet markets as the live equivalent, with players able to be immersed in the same betting style that they are accustomed to in a high-frequency nature. They can place bets and enjoy the thrill of their favourite sports at any time. If anything, virtual sports have become a strong game vertical in their own right, attracting a following of dedicated players.

As already mentioned, the last 12 months have seen a large uptick in the acquisition of virtuals and



**Steven Spartinos**

◆ *Co-founder & co-CEO*  
 ◆ *Kiron Interactive*  
 Steven Spartinos is co-founder and co-CEO of virtual games provider Kiron Interactive. Established in 2001, the specialist supplier now services web, mobile and land-based sportsbook and casino operators on five continents. Prior to joining the betting and gaming industry, Spartinos worked in banking and finance.

Featuring: Kiron Interactive



the largest increase has been online in countries that already had an established, strong presence in the retail sector. Most bettors turned to alternative style games that suited the live sports betting nature they are accustomed to, virtuals sports scratching that itch.

Part of the longevity of virtuals is built on the fact that they can be accessed at any time, not just at pre-determined, scheduled times per week as with live sports. It provides an easily accessible and consumable, bite-sized dose of sports betting entirely at the player's choosing, with them able to drop in and out at will, due to the round-the-clock and quick-fire frequency that is at its heart – something that isn't always available with live sports.

**EGR:** In younger sports betting markets where virtuals have yet to make an impact, is there a degree of education that is required for operators and players?

**SS:** Education is important in terms of introducing players to the products, what the benefits are and

how to play them. This is done through the marketing message that is pushed out and how the product is positioned to target these new players.

It's also important to note the trends of Generation Z especially, with their huge adoption and acceptance of technology and the resultant strong shift to virtuals within the demographic.

Once introduced appropriately, virtuals enjoy robust growth, especially in the current climate with a global increase in online activity and a great number of markets opening up to sports betting of all types. This has highlighted the numbers of new players turning to virtuals and becoming regulars.

**EGR:** What has been learned from the upsurge in virtual popularity in 2020 that can be leveraged for the future?

**SS:** There is no doubt that the impact of the global pandemic influenced the way a player would place a bet and, in some cases, has indelibly changed certain habits. As expected, as markets stabilised and live sports and other much-loved events returned, a decrease in activity did occur. However, what we found was that most punters found themselves enjoying virtual sports to a similar degree as the real thing and instead of virtuals being seen as a filler content, it only cemented its own vertical within the industry.

It has also shown that provided a new product is thoroughly developed, brought to market and operated wisely, there's no reason why a product some might consider as new and unusual can't be as successful as more established options.

**EGR:** What do suppliers and operators need to do to ensure that virtuals can sustain their recently gained momentum?

**SS:** As with many products in this and other industries, it's vital to have one eye on the horizon and try be one step ahead of current trends just as much as catering to current demands. This ensures an ever-evolving and contemporary portfolio that players can grow with. These games need to be consistently and successfully marketed, with the correct consideration given to individual markets and their idiosyncrasies – tailored products to the region and player's tastes.

If you're always pushing the boundaries of what can be offered and doing so in a manner that suits existing and potential partners and players, then you'll always be at the head of your game – an ethos we're passionate about at Kiron. ♦

Featuring: *Scientific Games*

# Upgrading US sports betting to the next level

Glen Saville of Scientific Games discusses how utilising specialist US sports traders and a powerful sportsbook platform are pivotal in having a competitive edge in today's fast-expanding marketplace

**T**wo of the US sporting calendar's key highlights have already gone by and provided plenty of talking points both on and off the field/court. While the Super Bowl and March Madness were always guaranteed to whet the appetite of sports bettors and provide plenty of opportunities for operators to reach a new audience, the levels of betting activity reported were simply unprecedented.

Clearly, there is more to come from this fast-expanding marketplace. More states are lining themselves up to embrace legalised wagering, while the significant value of commercial agreements being forged between the major leagues and our industry demonstrates the huge potential of US sports betting. Since 2018, we have witnessed a sharp rise in active customers, and that will grow even bigger as the US population of over 330 million become more accustomed to one of the world's oldest and most popular forms of entertainment.

Crucially, the growing demand for these services will put an operator's offering and the technology powering its sportsbook under greater scrutiny. Failure to deliver on the big occasions will have a serious knock-on effect on a customer's faith in a brand. And this means having a sufficient offering that consists of content that will appeal to a mass audience.

Of course, this must also be underpinned by a robust and scalable platform that can handle vast volumes of account transactions at peak times. With demand for sports betting opportunities set to be amplified over the coming years, now is the time to reevaluate your overall offering to ensure it is capable of meeting the high expectations of bettors.

## Superior trading knowledge

Just as we have experienced in mature markets across Europe, specialist knowledge on local sports is undeniably of key importance when it comes to trading and offering a wide array of markets. Savvy bettors are all too quick to pounce on any opportunity where they can get the upper hand on the bookmaker.

Simply put, trading experts that know the ins and outs of all major US sports will help operators trade their books more efficiently. They are closest to the latest trends and developments, and that superior knowledge significantly reduces the risks involved when offering odds both pre-match and in-play.

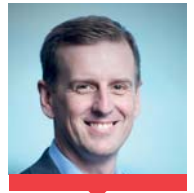
*With demand for sports betting opportunities set to be amplified over the coming years, now is the time to reevaluate your overall offering to ensure it is capable of meeting the high expectation of bettors*

**Glen Saville | Scientific Games**

Understandably, these specialist traders can be hard to come by and can come at a cost for operators looking to take their entire offering in-house.

As sportsbooks look to scale up their offering, third-party providers are required in order to sharpen their trading capabilities. At Scientific Games, our Don Best pricing and trading solutions are the market leader in betting data services and solutions for North American sporting events, including real-time pre-match and in-play odds pricing, with responsible gambling tools integrated to ensure the safety of players.

With Don Best working with in-house trading teams, operators have the potential to offer the widest coverage of sporting events and betting markets, whether it is on major US professional or college sports.



## Glen Saville

◆ Senior director, global trading  
◆ Scientific Games

Glen Saville possesses a wealth of operator experience within the global sports betting industry and is senior director, global trading, at Scientific Games. Saville is responsible for growing Scientific Games' global trading business overseeing Don Best Sports and SG's European operations to offer a seamless, industry leading service.



At the Super Bowl alone, we offered over 850 betting markets to ensure our customers could meet the preferences of a wide audience. From key markets such as the money line spread and the totals, to novelty proposition wagers, our data and trading experts delivered the most comprehensive offering across one of the biggest sporting events.

For the recent March Madness event, our NCAA markets saw a notable percentage of growth year-on-year for our customers, these increases further showcase the strength of our platform.

#### **Reliable platform technology**

In addition to specialist traders, it is becoming increasingly evident that sportsbook reliability is a must. We have seen how US bettors are not afraid to voice their displeasure when the standard of customer service does not meet expectations.

For example, February's Super Bowl LV saw many unhappy customers unable to place a bet and claim winnings, and this was primarily due to an operator's sportsbook technology unable to cope with the huge volumes of traffic occurring in the build up to the big game.

Given how the burgeoning US sports betting market will only grow over time, it is imperative that sportsbooks have access to reliable technology to ensure they do not experience significant downtime during key sporting events.

Without a stable and robust platform to work from, operators are more than likely to miss out on valuable revenue opportunities, especially if downtime occurs during major sporting events when sportsbooks are put to the ultimate test.

At Scientific Games, we are proud of the fact we have been able to handle peak volumes for high-profile events with no degradation in service. This is underpinned by our commitment to continually monitor and improve our platforms with the aim of achieving a faultless performance every day.

Undoubtedly, this is an exciting time for the US sports betting industry. The possibilities are huge to provide bettors across multiple states with an exciting form of entertainment.

The key to unlocking future success is to ensure the sportsbook offering expands in line with market growth. We are anticipating unprecedented levels of wagering over the coming years, which means the back-end operations must be able to withstand the increased pressure that is likely to follow.

At Scientific Games, we are committed to helping operators navigate their way through the marketplace and ensure they deliver the best possible service for bettors, and ensuring they gamble responsibly thanks to the integration of relevant tools. Together, we can build an offering that will truly evolve the sports betting experience forward. ♦

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