



COME AND PLAY

• SPONSORED EDITORIAL

Who do you think will win, who will score first, last, will each team score more than two goals, how many corners, yellow cards and sendings off will there be? Kick-off. Wait, the blues are two up, time to get in on the action and back the reds at 25-1.

The magic of sport is that fortunes can change in seconds, but so can the odds. The beauty of in-play betting is the flexibility operators have in being able to offer their customers a huge range of markets online and on mobile as and when events change at the click of a button.

Customers now have more choice than ever when betting on sport. A growing array of sportsbooks compete with one another to offer ante post odds but once the game begins, everything changes and they are able to differentiate and capitalise on developments during the game. Customers have responded in their millions to in-play since its introduction a number of years ago, and with mobile in-play growing rapidly and adding to the betting experience, this is sure to rise further in the future.

With more sports, leagues and tournaments to bet on than ever before, the range of in-play markets now available is vast. However, providing a reliable, durable and instant in-play offering 24-7 also has its challenges with customers demanding a service that offers up-to-date odds, can process a bet instantly and that does not buckle during big events. *eGaming Review* gets the industry's views on what it takes to be successful in one of the fastest-paced strands of the online gaming sector.

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The in-play roundtable

Sportsbook operators are in a rush to expand and improve on their in-play offering, aiming to create a flexible, user-friendly interface that allows companies to offer odds on a wide range of markets without confusing punters. A panel of in-play providers debates how operators can compete more effectively in an increasingly fierce battle for customers, and how their systems can help.

eGaming Review (eGR): How does your product differ from other in-play offerings in the market?

Paul Mears (PM): We firmly believe that GTECH G2 has, in the



MarginMaker product, the most complete in-play betting solution on the market. The technology we utilise stands us apart, but what really differentiates the offering is our Single Fieldbook, and the real-time automatic risk controls.

Margin Maker is the only system that supports fixed odds, pools and spread betting on any sport, across all channels – call centre, internet, mobile and retail – and for any business model. It is highly adaptable, which makes it ideal for an operator of any size and it is also the only solution that allows traders to view the consolidated risk from their entire set of channels.

Carsten Koerl (CK): Betradar is the only supplier in the market that controls the entire chain of its in-running offer – from the data collection at the venue through to the compilation and delivery of odds. All operations and technology developments are handled in-house, allowing us to guarantee the highest quality and security standards. Betradar's live betting services can be tailored for all types of businesses, from small retail outlets to large online operations, and its live odds services enable bookmakers to offer in-running betting on their websites without the need for a large in-house live trading team. For those that run their live trading in-house, our live scouting service allows them to trade on almost any major live event in the world. Betradar's comprehensive live betting offer is enhanced by market leading services such as pre-match fixtures and odds, trading tools, virtual games and an extensive portfolio of innovative front-end visualisation tools.

Johan Moazed (JM): The main difference with our product is that we offer a risk-free solution. We have been trading on very competitive markets since 2003. We are confident about our pricing and can therefore offer a solution whereby the operator participates in the profits but not the losses. This is, in many cases, a key point for start-ups or small operators who are not yet comfortable with the volatility of running a sportsbook.

As we handle all risk management for our partners, we see all the bets coming in, which gives us a lot of input to our trading models. I believe that this is a key part of creating good live betting prices.

Simon Trim (ST): Our trading and in-play pricing heritage is a key differentiator of our service. Unlike other suppliers we do not

scrape, copy or produce average prices. We produce proprietary prices based upon our modelling, pricing and trading expertise, which means our pricing is stronger and we can offer a wider range of sports in-play compared to other providers.

In addition, we are uniquely positioned in the industry in that Sporting Index, our B2C spread betting business, is a consumer of everything that Sporting Solutions produces. This means our partners can have the utmost confidence in our pricing as they know everything we provide affects us as much as them.

At the beginning of the year we launched our revolutionary cloud-based Global Trading Platform (GTP) and in May we were thrilled to receive two prizes at the *eGaming Review* B2B Awards in recognition of being the first cloud-based Software as a Service proposition in the sports betting industry.

Our partners, via a single integration, can access an unrivalled out-of-the-box solution for event management, pre-match and in-play pricing, resulting and liability management, all overlaid with a sophisticated suite of trader tools which provide intuitive user interfaces. Being cloud-based makes it both scalable and flexible to a partner's needs, while it also removes expensive data centre, network, hardware and system administration costs.

The GTP provides access to our automated in-play price outputs as well and our market-leading Cloud Calculation Engines (C²E). This is a ground-breaking concept which allows a sportsbook to trade an in-play event itself using our cloud based algorithmic models.

Lee Richardson (LR) : Our focus on football, by far the single-most popular sport for in-running betting (IRB), plus our unparalleled expertise in Asian-handicap betting, sets us apart from many of our peers.

One of the inevitable results of automated and algorithmic-derived prices that in-play markets increasingly rely upon is the gradual 'commoditisation' of prices. But unlike others, we don't just rely on such tools, highly-useful though they may be. We also use the experience, common-sense and intuitive knowledge of more than 700 traders with expertise in more than 30 sports to add informed insight to the pricing 'dynamic', and our clients appreciate that differentiating factor.

Far from it for me to suggest that our industry will ever have its own 'Black-Scholes' moment (the ultra-complex financial trading 'equation' blamed in part for the recent global financial meltdown), but the risk is clear when too many people rely on fundamentally the same, single pricing model. You also need real, live (and smart) human beings.

“One of the inevitable results of automated and algorithmic-derived prices that in-play markets increasingly rely upon is the gradual 'commoditisation' of prices” ♦ Lee Richardson, ONEWORKS

Roundtable participants



■ **GTECH G2's Paul Mears**, vice-president of sports betting, has been at

GTECH G2 since 2005 and has driven the company's sports betting offering from strength to strength, including most recently overseeing the start of BetCafe in Romania. Prior to this, Paul worked at Coral for 18 years.



■ **Sportradar's Carsten Koerl** is CEO of Sportradar AG, is the

founder of betandwin.com (now bwin.com Interactive Entertainment AG) and the brand name and services of Betradar.com. In February 2007, Carsten was leading in establishing the media brand Scoreradar.com. He is also founder of Sportradar AG.



■ **Betting Promotion's Johan Moazed** is CEO at Betting Promotion.

His main responsibilities have been market making development, organisation and customer responsibility towards betting exchanges. Moazed came to Betting Promotion from Gibraltar-based betting company Max Odds where he worked within the betting exchanges area.



■ **Sporting Solutions' Simon Trim**

began his career at William Hill before moving to Ladbrokes. He first joined Sporting Index in 1998 and became trading director of the spread betting operator in 2006. He was appointed managing director of the company's B2B subsidiary Sporting Solutions in 2011.



■ **ONEWORKS' Lee Richardson** is director, Europe for ONEworks Limited. Richardson has held senior CEO/COO

roles with Tote Direct, Coral-Eurobet, Chartwell Games and Boylesports and was the former marketing director of the British Horseracing Board. He is the CEO/founder of egaming consultancy Green Lane Investments, has an MBA from Strathclyde, and is a Fellow of the UK Chartered Institute of Marketing.



■ **BetConstruct's Suren Khachatryan** has been working for BetConstruct since 2003. A graduate of

the University of Birmingham with international expertise, he tried himself in betting business and still finds it challenging after 10 years in the industry. He is the CEO of BetConstruct.



■ **Sports Betting Tech's Itai Zak** is the CEO of SBTech. An online gaming veteran, Zak previously served as an

executive vice president of egaming products at Spiral Solutions and as executive vice-president and general manager of Spin3, the mobile division of Microgaming.

■ **Enetpulse's Phil Parry** is the business development manager for sports data provider Enetpulse, having been involved in the egaming sector since 2001. Prior to joining Enetpulse in 2007, he worked for MGM Mirage Online and betinternet.com in the role of marketing manager.



■ **Bet Smart Media's Jesse Learmonth** is president of Bet Smart Media, a technology company developing specialised in-play

betting apps optimised for mobile.

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Suren Khachtryan (SK): Our mission is simple; we want to offer the best sportsbook product on the market and an important part of that is being able to offer our clients the most advanced solutions and services. BetConstruct offers its clients customisable and modern sportsbook and white label solutions ranging from the creation of branded betting websites to establishing betting shops and providing coverage of all the major sporting events and markets, as well as pre-match and live betting modules. It is becoming increasingly important for us to provide our clients with a range of markets and opportunities across a variety of sports. Our product can be offered on all the main distribution channels – via web, land based betting shops and smartphones. Currently there are more than 500 betting shops, which have been launched using our software and technology worldwide. Developed by our experienced team of IT experts, it allows our customers to become a bookmaker and launch a business on a trustworthy platform. We can provide you with modern and simple software for cashiers in addition to a user-friendly, adaptable search system. The software allows clients to monitor and control all retail work, get financial reports on each staff shift, and we also supply accounting toolkits.

Itai Zak (IZ): SBTech covers all the major sports, leagues and events, and supplies a fully managed solution including risk management and trading, which means it is uniquely positioned to help operators grow into this dynamic market while helping to reduce their operational costs dramatically.

SBTech's live betting platform gives any offering a unique competitive edge by making the following available:

- 30 plus types of live bets on over 12 types of sports
- 7,000 live events each month
- A wide variety of special in-running bets
- An advanced HTML5 based mobile platform which allows punters to bet anytime, anywhere on a large variety of sporting events
- A single live betting system/account for online, mobile and retail

Our traders generate hundreds of bets per second on major live betting events. By using unique tools and algorithms, these experienced traders calculate more than 30 bet types during each live event. Our sophisticated systems, combined with great expertise, generate phenomenal margin compared to the industry average.

However, high turnover can also generate high liabilities, which is why SBTech has developed real-time risk calculation tools. The system gives live betting traders the ability to react quickly and efficiently to any development within events, monitor market movements and trends and analyse liabilities throughout all markets offered.



“We transmit the official data from over 15,000 tennis matches a year directly to the operator in less than two seconds”

◆ Phil Parry, Enetpulse

Phil Parry (PP): Our main differentiator is tennis, where we supply official data to bookmakers. Enetpulse were awarded the exclusive worldwide distribution rights for Association of Tennis Professionals (ATP) and Women's Tennis Association (WTA) official live scoring tennis data in September last year. It was the first deal of its kind with a major sports federation and we launched the product in January. From an in-play market perspective, it means Enetpulse can offer the fastest tennis data solution on the market. We transmit the official data from over 15,000 tennis matches a year directly to the operator in less than two seconds. Earlier this year, Enetpulse also launched its in-play service for football so we have the two major sports covered with several more in the pipeline.

Jesse Learmonth (JL): Our relationship with the applications we choose to place on our mobile platform mimics real life; we have brief dalliances with many, but only enter long-term relationships with a select few. When it comes to in-play betting apps currently on the market, none are what we'd call 'marriage

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◆ Lee Richardson, ONEWORKS

material’. Bookmakers tend to display in-play markets using rigid, hierarchical betting menus, which works fine on the web, but it doesn’t make for a pleasurable mobile experience. The proliferation of smartphones and their soaring adoption rates have changed the way we interact with mobile devices while we watch and bet on the match, whether at home, in the pub, or watching live in the stadium. At Bet Smart Media, we’re betting on a future of specialised, sport-specific betting apps. Our first title will be launched later this summer with selected sportsbook partners.

eGR: When developing an in-play offering, how can suppliers best ensure they can create a user-friendly offering, while providing odds on as many markets as possible?

PM: The breadth of an operator’s offering is certainly important when it comes to in-play, but it is vital to present it to the player in a user-friendly way. Every second counts during the volatile nature of in-play betting, so the ability to navigate simply and smoothly must be an integral feature. The latest live odds must be constantly updated and be able to be accessed immediately.

CK: Providing odds on as many markets as possible comes as

part of the challenge to visualise in-play offerings in a user-friendly way. End customers are becoming more demanding and expect entertainment from betting sites, so our content solutions cater for exactly this need and provide customers with all the information they are looking for. Therefore, we have set out to develop truly innovative and entertaining front-end visualisation tools that help our clients to create an even more user-friendly offering. In addition, our live betting turnkey solutions provide the widest variety of sports available in the market, from football, to futsal. To date, our coverage accommodates over 5,000 live events around the clock each month. Moreover, we have already added further player, booking and corner-related betting markets, extending our portfolio to more than 100 markets.

JM: We are not a B2C product. We are purely B2B on top of our own trading business. I firmly believe that you should stick to what you do best. In our case, this is pricing and trading. We did at one point consider offering a complete platform including sportsbook software. However, we realised there are many people and companies that are much better at that than we are. So, instead of developing this ourselves, we created partnerships with these companies. Providing these partners with good quality content (competitive pricing and extensive markets) ensures their customers have a good offering.

ST: The key here is flexibility – some operators will only be interested in particular sports and markets, so you need to be able to adapt to individual requirements. At Sporting Solutions, we already cover an unrivalled 22 in-play sports, with more currently in development.

Our service is developed by traders for traders and this customer-centric approach is evidenced throughout the GTP. We took great care in ensuring it had a set of preconfigured settings, which can be fully customised by the partner according to their own requirements. This automates much of the service, removing manual overheads and enabling rapid set-up and deployment, as well as allowing for automated price feeds to be combined with a partner’s existing trader-driven pricing.

LR: It’s still the case that, despite the proliferation of different in-play markets on the most popular sport over the past few years, football punters the world over still place the vast majority of their bets (perhaps 90% plus) on just two core markets: the 1x2 (perhaps 60%) and the over-under goals market (perhaps 30%). Because of that, it’s essential that you keep these markets to the forefront, keeping the access and execution of these ultra-popular bets both simple and effective so that the operator can harvest the rewards these bets reliably produce. The remaining 10% or

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so of markets can and do produce valuable additional revenues, but they continue to remain dwarfed by these two most popular markets; you simply have to get these right.

IZ: One of the problems with offering large amounts of betting content (including more than 7,000 events a month and tens of thousands of bets) is that user experience might be less smooth and intuitive, unless the right tools for easy navigation and orientation are available. We try to make it as simple as possible with various sub-navigations controlling each important section, allowing the player to find his bet within a few seconds and use as few clicks as possible to place it.

SK: When it comes to both live and pre-match betting, we offer probably the most advanced, customisable and flexible solution. We provide branded live betting solutions, combining technological innovation, industry knowledge, risk and operational management services. The software is simple and easy to use for any type of in-play trading. Every customer can easily control the number of market selections and margins using just a few management features. Our software solutions not only create events and prices but also update them pre-match and in-play. Moreover, the whole process is being monitored and controlled by the team of experienced product managers, traders and software developers.

“One of the problems with offering large amounts of betting content is that user experience might be less smooth and intuitive” ♦ Itai Zak, SBTech

PP: Through the effective presentation of data, but also the operators' brand, positioning, number of customers and where they are active should be factored in. If operators could price up to 200 plus in-play tennis markets on Federer vs Nadal, that's a lot of scrolling for the user to find what they want and place a bet.

More could also be done by operators to understand their customers' in-play behaviour and build the product around it, taking the form of player preferences and display tools to enhance the overall experience. With the range of in-play odds and markets available, it's not a one-size-fits-all approach anymore. The operators can be a lot smarter with the content available and extract the maximum value from the information their customers are giving them each time they log in and wager.

JL: The term “user-friendly offering” means different things to different people. If you compare current mobile in-play offerings, it looks like the question being asked at the design stage was, “How do we better display this table of in-play prices on a mobile screen?” When we performed the same exercise at Bet Smart Media, we asked, “Why does it have to be a table of in-play prices?” We reckon there are more interesting ways to display in-play markets by applying a combination of game mechanics, visualisations, and social hooks to create a true ‘second screen’ betting experience.

eGR: **Is it vital to offer a range of different in-play betting markets covering a range of sports and leagues, or can suppliers develop strong offerings for a smaller number of markets, and still generate significant profit levels?**

PM: Consumers are more demanding than ever. They are also savvier than ever before, meaning that choice is one of their biggest requirements. Increasingly, operators are being forced to offer a complete range of products to satisfy those who expect to be able to play poker, bingo, casino or slots from the same account that they have for sports betting, wherever they are.

It is no different when it comes to in-play markets: players want more. However, a smaller offering can work for an operator if done properly – it depends on a deep understanding of the target market's expectations. GTECH G2 will perform an in-depth gaming market analysis for an operator and work with them to supply the solution that fits not just their needs but also the needs of the market. After surveying what is already offered, we will outline the local demand and map opportunities to define the optimum sports betting product.

Our sports betting system is integrated with all the major price feeds and a vast number of other professional data suppliers for specific sports and geographical regions, and features a derivatives engine to allow automatic pricing on a wide range of markets based on match activity, as well as traders' assessments.

CK: As the world's leading supplier of sports and betting-related data, we need to focus on all the different customer needs around the globe. Today, more than 120 out of over 300 bookmaker clients in more than 60 countries rely on Betradar's in-running services. In order to meet all these various customer needs, we will be increasing the list of sports to be covered live during 2012 with American football, baseball, rugby, table tennis and badminton. With regards to live betting opportunities, our plan is to cover and offer more than 7,000 events per month in the future.

JM: I believe it is vital for the operator to offer a wide range of sports, leagues and markets to attract the end user. It is especially important to be able to offer a round-the-clock service as we have seen that the end-user appreciates the opportunity to place bets

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“We believe that any sports platform should offer a diverse selection of sports and markets in order to attract the right operators” ♦ Itai Zak, SBTech

on a variety of events and not only major sporting events.

Suppliers will benefit from being able to offer a complete live betting package as it is much easier for the operator to deal with one sole supplier. However, there is definitely room for specialists to offer specific live betting sports/markets to the supplier who in turn provides the complete package to the operator.

ST: Everything we do at Sporting Solutions is based around offering a product that is better than what a sportsbook can produce itself, or source elsewhere. Very few operations have the capability to produce a top class in-play service for sports like baseball, ice hockey and Australian rules football, so the depth and breadth of coverage that we offer at Sporting Solutions is clearly an advantage.

LR: I don't necessarily agree that the mass-proliferation of individual markets, or range of sports, automatically produces more loyal, more profitable or 'stickier' customers. The relative

gross margins of such markets can often be less reliable than the core markets too.

Some players will expand their portfolio of bets when new markets and sports arrive, but most remain creatures of habit. That means that some operators can offer, perhaps, a narrower range of in-play bets, but aim to differentiate themselves in other ways, such as the range of matches they might offer. We offer around 5,500 live football matches in a typical month, for example. Others offer less, or with fewer live markets.

Some operators' in-play systems take an age to update markets after a goal has been scored, or a set won or lost, whereas others are up within seconds. It's not just the markets on offer, it's when they are available that matters most to the majority of customers.

SK: Nowadays, the in-play betting services have become one of the most important parts of any betting business. The large amount of markets notwithstanding, suppliers can develop small offerings for numbers of markets as well, and can turn a profit depending on which markets they cover.

IZ: In today's global market, success would be almost unreachable with limited sports, leagues and types of bet. Players want to bet on a variety of international football markets – where SBTech is a market leader, offering odds on more than 150 leagues – as well as on other sports including tennis and basketball.

We believe that any sports platform should offer a diverse

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selection of sports and markets in order to attract the right operators. Our operators come from all over the globe, each targeting different markets. SBTech provides full coverage and support for a huge variety of sports, events and bet types that includes everything today's bettor could wish for.

PP: Content remains king and the larger firms retain their advantage given their offering, resources, customer base and brand. It's a clear statement by these operators to punters that you can bet on hundreds of in-play markets at any time with us. You could even class it as a key part of their marketing strategy and it will remain a powerful call to action. The industry moving away from manual trading towards part or full automation continues to gather pace, which in turn places greater emphasis on fast, quality data feeds. You can't automate from a TV or streaming picture as you still need a 'human' to manually key in the data, adding further crucial seconds to the in-play process. Another key factor here is the bet delay. Operators that focus on quality and speed of both price and event data have the option to take a 'level playing field' approach. Those who can sync the live action with the in-play odds movement will ultimately win out.

"It's becoming less about adding to the sheer number of markets offered, and more about how to increase adoption and grow revenues from each specific market" ♦ Jesse Learmonth, Bet Smart Media

JL: From discussions with operators, it would seem that some variant of Pareto's Principle is occurring, where a disproportionately small percentage of in-play markets represent a disproportionately large percentage of total in-play revenue (aka 'The 80/20 Rule'). If true, then it stands to reason that offerings with smaller numbers of markets can still turn a profit. It's becoming less about adding to the sheer number of markets offered, and more about how to increase adoption and grow revenues from each specific market. Repackaging the way markets are displayed and making the experience feel less like a banking transaction would surely help drive adoption, and grow operator revenues as a result.

eGR: **With in-play betting accounting for significant amounts staked on online sportsbooks, the marketplace is likely to become more competitive. How can established service providers retain,**

and new suppliers gain, new market share?

PM: There can be no underestimating how important in-play has become to sports betting and this trend will only continue as more and more people turn to mobile betting. Whether in the stadium, at the pub, just watching on TV – or even not directly following the game – mobile is perfectly suited to surveying odds and live betting.

Previously, betting apps would often cannibalise existing business, but there is a growing understanding of, and catering for, how people interact differently with mobile devices.

CK: We have repeatedly demonstrated over the years that we can regard ourselves as a provider of services tailored to our clients' individual requirements. Nevertheless, the best brands are all guided by a clear vision and a culture that makes them truly unique and enables them to be highly innovative. It is primarily about a clear product differentiation combined with constant innovation and investment in new technologies. To deliver yet more exciting betting opportunities to our clients around the world, Betradar will always seek further investment in the future of innovative betting solutions.

JM: The two categories, to a large extent, need to focus on the same things and in many cases this will not be live betting-specific:

Price – although many clients are not price sensitive it is clear the market is moving in the direction of becoming more competitive on pricing.

Service – as in the majority of businesses it is vital to offer good service in order to retain a larger number of loyal customers.

Coverage – You need to offer clients as wide a range of betting opportunities as possible. It is crucial to add new and interesting markets.

This applies specifically to us. Being new to this market, it is important to have a strong financial platform. You need to make large investments into your infrastructure and it takes large resources to be able to provide a high quality product. Our background as a market maker with existing revenue streams ensures that we have the financial stability to establish ourselves in this market.

ST: Technology and talent are absolutely crucial and we continue to invest heavily in our modelling development, trading expertise and overarching GTP solution. Importantly, we are developing to support sportsbook requirements of today as well as the future, based upon our inherent understanding of the industry. A huge amount of planning and development went into the GTP before it was launched and we believe that it sets the standard.

The GTP is positioned to bring together elements of proprietary and open source product development with real-time distribution

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and has the potential to underpin the subsequent formation of an underlying liquidity pool. The prices available on the platform will not be like those lacking liquidity on the exchanges. They will be the prices that are generated, iteratively improved, proactively traded and funded by a community of individuals and businesses interacting through a stable common platform that is cost efficient and easy to scale.

LR: The established providers are doing a good job in our experience in defending their market share; Oneworks has expanded its share through offering new territories to European operators looking for expansion into Asia, for example. Our expertise in using a blend of pricing tools coupled with real, live traders appeals to many operators. Other providers rely on prices they themselves don't actually produce, and so are exposed in that way; it remains to be seen how viable those providers might be over the next five years. Whatever happens, the competitive dynamic will remain, and customers will be the beneficiaries of that.

SK: Our mission in 2011 and 2012 was to focus on in-play offers. Over the past six months we have twice increased the number of in-play events, as I said previously, to cover 8,000 events on a monthly basis. We have also integrated an automaton tool to our software, which allows us to offer odds across a huge number of markets and sports. Due to the hard work of our team, we currently offer one of the most competitive in-play products on the market.

IZ: For existing service providers to keep their market share, they must keep pace with the latest coverage of live sports and leagues, types of bets and user experience.

Investing in new technology and continuing development of the sports product is a crucial element no provider can avoid. The popularity of new channels – mobile, smartphones and tablets – is growing quickly and presents an additional challenge any service provider needs to address in order to avoid being left behind.

PP: I'm not convinced the marketplace for suppliers will become more competitive; if anything I would expect to see further consolidation. If you take our tennis agreement with the ATP & WTA, we're of the opinion that this agreement will prove a forerunner for other sports federations to consider monetising the value of their official data.

JL: Today we find ourselves in the midst of a widely acknowledged footrace between leading operators to offer the most in-play markets. This chapter of the in-play story is all about establishing market share, and the winners of the race will be the operators with the most in-play markets. The next chapter - which is fast approaching - will be all about protecting and growing existing

“The popularity of new channels – mobile, smartphones and tablets – is growing quickly and presents an additional challenge any service provider needs to address in order to avoid being left behind” ♦ Itai Zak, SBTech

market share, and the loyalty a punter has to the product will be increasingly important. Can they easily substitute the product with a competing one? Looking at the current mobile in-play offerings, the answer is an overwhelming “yes”. Switching costs are low for punters right now, which is not conducive to retention. Specialist in-play betting apps provide an opportunity for the punter to develop a deeper relationship with a narrower segment of the overall offering, which could be a far more effective long-term retention strategy than being a mile-wide and an inch deep.

eGR: How can your in-play solution help operators offer their customers a stronger, more immersive in-play solution?

PM: GTECH G2 has developed WARP, a unique content management system, specifically for the nuances of the sports betting market. It allows operators to fully customise the look, feel and functionality of their sportsbook, with multiple language options.

Furthermore, the integrated wallet system is key. With the potential to add so many products to the sportsbook, it is a fundamental part of creating a seamless play experience.

CK: In these challenging times bookmakers need to optimise their operations by automating processes in a cost effective way. Our services meet exactly these needs and help to maximise the profit of each customer. Thanks to our full service offering, the customer can focus solely on risk management and profit optimisation. Furthermore, Betradar's live odds are proven to generate profit margins above the market average. Driven by over 100 live traders the odds generation is supported by our highly sophisticated mathematical models and our complex market monitoring. Our live betting team of experienced live traders, mathematicians and highly specialised IT experts enable us to provide our clients with unrivalled quality.

JM: Although technology has advanced considerably in the last few years, live betting is still a relatively personal product. This means that it will be more cost-effective to have a number of specialised live betting suppliers catering for the demand of a

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large amount of bookmakers.

Our strategy is simple; listen and adapt to the needs of your partners. Be flexible and innovative. Make sure to add sports and markets to your coverage on a regular basis.

ST: We continue to successfully differentiate ourselves in our approach which is based upon our expertise in modelling, pricing and trading, and is positioned at the other end of the spectrum from the general 'consensus' pricing that is rife in the industry and has a corrosive effect on margins.

Our GTP offers partners a one-stop-shop for all their sportsbook requirements, giving them unmatched price quality, a class leading level of coverage and an unrivalled depth of markets via the most sophisticated trading tools available. It is the complete in-play solution and the one that enables partners to maximise their in-play potential.

LR: By offering the most popular bets on the most popular sports, and by making sure those markets are as available as early as possible, and are updated as quickly as possible. Customers don't want to wait minutes any more to decide whether or not to step back into an IRB market; they demand that opportunity within seconds and our platform allows our clients to do just that. Five years ago, perhaps 80% of all the bets you would take on a football match would be made before a ball was kicked; now the same proportion of bets are made after the game gets underway. That's a remarkable turnaround, and anyone relying on a platform that isn't designed to take full advantage of that huge change in customer demand isn't going to last long in the fast-moving IRB market, whatever the sport. Offering your platform through as many channels as demand requires - laptop, tablet, smartphone or retail - is clearly the way the industry is moving.

SK: Our solutions already provide odds on a wide range of sports across a variety of markets, covering the likes of football, tennis, basketball, ice hockey, handball, volleyball, rugby, futsal and netball. In total, BetConstruct covers 8,000 live matches each month, but with further targeted investment programmes we plan to grow this to around 10,000 sporting events a month by the end of this year. Our software developments can provide our customers with full and detailed information on the match results and statistics for a range of sports, including exact data on specific match events such as goals, goal kicks, shots on goal, shots off goal, blocked shots and corners. This development is also available as a product in its own right; the Live Match, Live Score and Live Stats centres can easily be integrated into any existing solution, a BetConstruct product or a platform developed by a different provider.

As well as our innovative B2B solutions and state-of-the-art platform, we take care of each of our clients by examining the needs

of each business on a case-by-case basis, or partner based on the individual requirements and needs. Our 24/7 Live Chat Support provides 24-hour, expert support in more than 11 languages.

IZ: SBTech's advanced, fully-managed solution addresses this problem in the best possible way. Operators can grow their turnover significantly with our elite offering and still avoid odds feeds and trading-related costs, as both items are included in the package. The remarkable margins we have managed to deliver so far will optimize your profit line even further.

A great proof of concept for our advanced model is Betshop, who own land-based betting shops and internet access points across Europe. They have managed to triple their live turnover in the first month of operating with our live product.

PP: Enetpulse's in-play solutions tick two main boxes: They permit the transactional elements of in-play; choice, speed, minimal bet delay and fast payouts as well as enhancing the UI.

If players are offered a more personalised experience combined with live game data, stats, bet stimulating messages and trends live at their fingertips, their propensity to wager should increase. In essence you're giving them the full picture as they can then react 'real-time' with a more informed choice as the odds move and the action unfolds.

"If players are offered a more personalised experience combined with live game data, stats, bet stimulating messages and trends live at their fingertips, their propensity to wager should increase" ♦ Phil Parry, Enetpulse

JL: No two punters are created equal. Not every football punter fancies basketball, and not every tennis punter fancies ice hockey. Yet when I load my favourite betting apps on my iPhone, I'm forced to scroll through mazes of bowling, beach volleyball, field hockey, and other sports I'd never bet no matter how desperate I am for action. It's annoying for me, and doubly so for bettors. Our sport-specific, specialist apps will create a deeper and more immersive experience for punters focusing on the sports that matter to them, and will strengthen the relationship the punter has with the product, driving key ARPU & LTV metrics for operators. We'll be rolling out our portfolio later this summer, and will regularly release apps for new sports, leagues, and markets. ❖