

Esports and Casinos: The Coming Collision

G2E 2016

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Esports fans

US ESPORTS FANS - KEY NUMBERS

41.7 **MILLION**

Size of the esports audience in the United States

Percentage of esports fans that are 21 and over

70 **PERCENT**

37 **PERCENT**

Percentage of esports fans that are willing to pay \$99 or more for an event ticket

US ESPORTS FANS – GAMBLING PROPENSITY

2
TIMES

Esports fans are two times as likely to have gambled online vs typical consumer

60
PERCENT

Percentage of US esports fans that use fantasy or betting sites

\$715
MILLION+

Esports-related gambling handle among US esports fans in 2016 (est.)



Esportsbook betting



ESPORTSBOOK BETTING - KEY NUMBERS

\$3⁺
BILLION

Total wagered on esports
match outcomes
(2016, est.)

Projection for annual
esportsbook handle
by 2020

\$12⁺
BILLION

90⁺
PERCENT

Percentage of international
online sportsbooks
that offer esports

ESPORTSBOOK BETTING – KEY TRENDS

- Development of in-play betting
- Formalization of game integrity processes and partnerships
- Regulatory approach coming into focus



Video game gambling

VIDEO GAMERS IN AMERICA - KEY NUMBERS

192
MILLION

Number of "gamers" in
the United States

Gamers that are 21+, visit
casinos, and are in the top
household income bracket

23
MILLION

97+
PERCENT

Percentage of US
households with a gaming
device

VIDEO GAME GAMBLING – KEY TRENDS

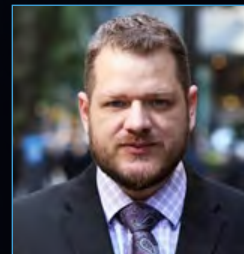
- Major deployments starting in 2016-17
- Significant overlap with movement toward gambling games with skill element
- Emphasis on peer-to-peer competitive gaming

Naruscope

Esports & Casino Resorts

Esports & Casino Resorts is a two-day conference bringing together stakeholders from the commercial gambling and esports industries.

THE FOCUS: A pragmatic, in-depth discussion of the mutually beneficial opportunities that exist today.



Tobias Sherman
Global Head of Esports,
WME | IMG



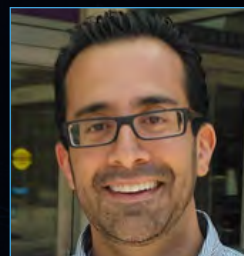
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Manny Anekal
Gaming and Esports Executive



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Rahul Sood
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Twitch Esports



Christopher LaPorte
Founder, Quantum
Gaming Concepts



Seth Schorr
CEO, Fifth Street Gaming,
Downtown Grand



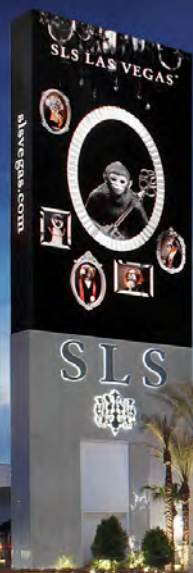
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at UNLV IGI



Brett Lautenbach
Agent, WME | IMG Esports



WHEN
October 25-26, 2016

VENUE
SLS Las Vegas

INFO
Naruscope.com

Questions?

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