

September 23, 2022

Latest state updates highlighted in green

IDEA Priority States in Legislative Phase 2022

State	Current Status	Key Dates	IDEA Engagement / Opportunities
ILLINOIS <i>(iGaming + Sports Amendments)</i>	<p>This week we met with internal and external lobbyists for Penn which has 3 casinos in the state. They support our efforts to promote iGaming and claim it is also a top priority for them.</p> <p>They would like to work with us on “iGaming education” sessions with lawmakers, but are not certain on timing of when these should occur. The November veto session may be the earliest date for this. We have asked for their help get the support of the Casino Association.</p> <p>We have also tried to ascertain Rush Street Gaming’s interest in pursuing iGaming. They are an influential casino player in Illinois. As of now, they have not been willing to commit to a position.</p>	<p>Fall – Possible fly-in to Springfield during the veto session.</p>	<p>John Pappas met with Rep. Bob Rita in Illinois this week. We discussed the supplier licensing issue and urged him to include our language (which has already passed the Senate) into any gaming bill that may be considered in November. He committed to work with us.</p> <p>IL fiscal year revenue reports will be released later month and we will include data on sports wagering tax revenue into our letter we are sending the Governor’s office to get their support for the supplier license fee fix.</p> <p>iDEA continues to engage with in-state gaming stakeholders to build a coalition of support around iGaming. While in IL, Pappas met informally with the lead lobbyist for the VLT providers. He was adamant that no iGaming bill will advance in 2023.</p>
INDIANA <i>(iGaming)</i>	<p>Indiana continues to be a top target for iGaming expansion in 2023. Our lobbying team on the ground has provided a comprehensive update on where things stand and next steps. Encourage you to read our update on the Member Portal.</p>	<p>End of Sept – release of IGC iGaming study</p>	<p>Our team is actively using the interim session to meet with influential lawmakers and gather support for iGaming.</p> <p>Please read latest update on the Member Portal.</p>

<p>MASS <i>(Sports)</i></p>	<p>On 09/22, the Massachusetts Gaming Commission held a roundtable with potential online sports betting operators. The Commission was seeking input on whether Massachusetts should institute a staggered online sports betting launch date and if unlimited temporary licenses should be awarded.</p> <p>Of the potential operators who spoke, the majority prefer limited temporary licenses and a universal start date. However, there were several casino and sports betting operator representatives that already have tethered online sports betting agreements that pitched the idea of three separate universal start dates for each type of sports betting license.</p> <p>The Commission’s Executive Director suggested that each operator submit a potential timeline to the Commission about when they could launch online sports betting if they were to receive a license. It was also suggested that each operator share their plans for the scenario of receiving a temporary license and then shutting down if they don’t receive a permanent license.</p> <p>The Commission now has a dedicated page for sports wagering updates. It is linked here: https://massgaming.com/about/sports-wagering-in-massachusetts/</p>	<p>No firm dates announced for launch.</p>	<p>iDEA is closely monitoring developments in Massachusetts and will be providing input to the MGC as they develop rules and regulations.</p> <p>iDEA played a role in shaping the final policies in the bill. Many of the key items we advocated for were adopted by the legislature. You can read a sample of the letter that was sent to all 6 members of the conference committee here: iDEA-Letter-to-Senator-Lesser 6.8.22.pdf (ideagrowth.org)</p>
<p>MISSOURI <i>(Sports + iGaming)</i></p>	<p>As we reported last week, the Missouri legislature started a “special session” this week. On Monday, a House Committee held a hearing to discuss the urgent need for Missouri to pass sports betting, especially in light of the recent launch of the Kansas market.</p> <p>Driving the discussion at the hearing, was data from iDEA member GeoComply showing that thousands of Missourians are attempting to access regulated OSBs in Kansas, and that thousands are traveling across the border to place bets.</p> <p>Because the special session is limited on what types of bills can be passed by the legislature, there is a high hurdle for sports wagering to proceed beyond the committee stage.</p>	<p>Next week – Possible committee vote to advance bill during special session.</p>	<p>iDEA shared information with Rep. Houx and other lawmakers in advance of the 09/19 hearing.</p> <p>We continue to communicate with lawmakers to provide data an information they can use to advance the legislation during the special session and beyond.</p>

	<p>The attention the issue has gotten this past week, helps position it for the 2023 session. The Governor's office stated they would support a bill next year.</p>		
<p>NEW YORK <i>(iGaming)</i></p>	<p>Senator Addabbo is drafting his iGaming bill and is asking for stakeholders to provide input. He hopes that recent fiscal projections, showing a future \$10b deficit for the state, will provide ammunition to get his proposal included in the state budget.</p> <p>One major issue of discussion is how to, or whether, to include the state-approved VGT establishments. They have been vocal asking for inclusion or accommodation in the bill.</p>	<p>Fall – iGaming briefing with Sen. Addabbo and IDEA members.</p> <p>December – reintroduction of iGaming bill.</p>	<p>John Pappas will be meeting in NY with Senator Addabbo next Wednesday and Thursday. To discuss the future prospects of iGaming.</p> <p>We are providing input on his legislation from earlier this year so it can be prepared for introduction before session which begins in January.</p>

Priority States in Regulatory Phase 2022

State	Current Status	Key Dates	iDEA Opportunities
OHIO <i>(Sports)</i>	<p>This week the OCCC approved several conditional licenses for Type A proprietors (master license holders) and select suppliers. A list of approvals can be accessed via the Commission's licensing page.</p> <p>The OCCC has also sent reminders to all prospective operators about two upcoming deadlines. Key employee applications and holding forms are due October 5th. Compliance materials and standard employee applications are due by November 2nd.</p> <p>Included in the November 2nd deadline are complete, final, and Commission-approved versions of responsible gaming plans, required procedures, house rules, facility plans, geolocation procedures, and equipment test reports.</p>	<p>Oct 5 – Deadline for key employees and corp forms.</p> <p>November 2 – Compliance materials must be approved by this date to launch by Jan 1.</p>	<p>iDEA continues to engage with the OCCC on matters related to rulemaking and the launch of mobile sports betting.</p>
MARYLAND <i>(Sports)</i>	<p>On 09/22 the MD SWARC and MD Lottery announced that it would approve mobile licenses on a “rolling basis” to accelerate the launch of the market. We reported on this possibility in an earlier update.</p> <p>The announced deadline to submit a SWARC application is Oct 21. While the SWARC has not committed to opening future application windows, information received from the MD Lottery and lawmakers suggests that additional opportunities to apply <i>should</i> become available, particularly, if few of the initial applicants demonstrate ownership diversity – beyond the required personal net worth ownership mandate.</p> <p>More info on the 09/22 SWARC meeting can be found on the Member Portal.</p> <p>Also we recommend anyone seeking an mobile license in Maryland to review the SWARC's updated Application FAQs.</p>	<p>Oct 21 – Deadline to submit application for mobile license.</p> <p>Late 2022/Early 2023 – likely timeframe for approved operators to launch.</p>	<p>iDEA continues to monitor activity of the SWARC and MD Lottery and also communicates with these bodies as needed.</p>
ONTARIO, CAN <i>(iGaming)</i>	<p>The AGCO released proposed revisions to the Registrar's Standards for Internet Gaming on August 29th for stakeholder input.</p>	<p>Sept 19th – Comments due on</p>	<p>iDEA has engaged with AGCO/iGO and government agencies throughout the process and continues to reach out on issues of shared industry concern.</p>

	<p>The Ontario gaming regulator is targeting October 31 deadline for grey market online gaming operators to complete their transition into the regulated market.</p> <p>The AGCO has also submitted new proposed requirements for live dealer games. They would add new technical requirements for the operation of the live-dealer games related to the security of the physical equipment used in the games.</p> <p>Comments must be submitted through the AGCO’s iGaming Engagement Portal by September 19th.</p> <p>iGaming Ontario also released revenue numbers for the first 3 months of launch. A full release of numbers can be found here.</p>	<p>updated Registrar standards</p> <p>Oct 31 – deadline for transition from gray market to legal market.</p>	<p>While the revenue numbers for Ontario are lower than what the industry/public may have expected, we are told that the government views them very favorably based on their expectations.</p> <p>Key factors include that several of the larger brands which had an existing Ontario customer data base did not launch until the latter part of first quarter.</p> <p>The belief is that channelization rates will grow significantly over Q2 and Q3 as the market matures and more companies become fully approved.</p>
<p>KANSAS <i>(Sports)</i></p>	<p>Kansas sports betting market launched on 09/01. Deemed a “soft launch” it is essentially a full launch with just 6 operators starting.</p> <p>Based on data from iDEA member GeoComply, more than 520,000 geolocation checks occurred within the first 8 hours of launch.</p>	<p>Sept1 – Soft launch</p> <p>Sept 8 – full launch.</p>	<p>iDEA is communicating state Lottery and the Racing and Gaming Commission who will have joint oversight over the rulemaking process and the regulation of sports wagering.</p>