

GLOBAL ONLINE GAMBLING AND BETTING MARKET 2014

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- Market reports by yStats.com inform top managers about recent market trends and assist with strategic company decisions.
- yStats.com has been committed to researching up-to-date, objective and demand-based data on markets and competitors from various industries since 2005.
- In addition to reports on markets and competitors, yStats.com also carries out client-specific research.
- Clients include leading global enterprises from various industries including B2C E-Commerce, electronic payment systems, mail order and direct marketing, logistics as well as banking and consulting.

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Global Online Gambling & Betting Market 2014

General Information

Product Details

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Site License:	€ 2,925 (excl. VAT)
Global Site License:	€ 3,900 (excl. VAT)

Key Findings (1 of 2)

Online gambling is spreading worldwide, motivating governments to regulate

The regulatory landscape on online gambling and betting is varied. The majority of Western European countries have some laws in place to channel online gambling and betting. In North America and major Asian countries online real-money games are yet awaiting progress in regulation. In the USA, online gambling is legal only in three states and in many Asian countries gambling and betting is allowed only in casino resorts. The spread of online betting and gambling is forcing governments to act to regulate. The global online gambling market has a current value estimated at a medium double digit number in billions of Euros, with growth expected between +7 and 10% annually in the next few years.

Trends in global online gambling and betting

The major trends in online gambling and betting globally are mobile and social gambling. Mobile gambling is expected to grow at double-digit rates and to reach over 40% of the total online gambling market by 2018, as the number of mobile gambling users increases by a hundred million. Social gambling, evolving from the desire of game developers to monetize gaming on social networks is a trend to watch. The growing acceptance of the digital currency Bitcoin is another trend in online gambling.

The leading online gambling and betting companies worldwide include PokerStars, Bwin.Party, William Hill Online, each of which annually generate online revenues of over EUR 0.5 billion. Also Betfair Group, Paddy Power, 888 Holdings and Ladbrokes are among the leaders on the market. Most of these companies operate under the license of Gibraltar, and two are registered on the Isle of Man.

Regional variations in legislation and acceptance of online gambling and betting

In North America, online gambling was legalized in three US states by early 2014, with online gambling revenues surging to millions in the first months of legal operation. New Jersey, Delaware and Nevada have allowed online gambling on their territories, with more states expected to follow, while no progress in regulation was made on the federal level. In New Jersey, the largest of the three, online casinos were legalized in November 2013 and generated almost USD 1 million in revenue during the first week of operations. In 2014, the number is approaching USD 10 million per month, with almost several hundreds of thousands gambling accounts being registered.



Global Online Gambling & Betting Market 2014

Key Findings (2 of 2)

Online gambling is spreading worldwide, motivating governments to regulate

In the largest Latin American market, Brazil, gambling and betting is forbidden except for horse racing. However, offshore gambling websites are popular among Brazilian gamblers, who spend several hundreds of EUR million annually on offshore sports betting sites. This offshore betting activity will likely increase in 2014 with the World Cup taking place in the country. In Mexico and Argentina online gambling is allowed only under special license, though in Mexico offshore websites are more popular than the regulated domestic sites. As online gambling becomes legalized in several USA states, it is expected that Mexican casinos will partner with them to boost the market. Argentina has the largest number of registered online gambling and betting websites in Latin America.

Europe has been a leader in adopting regulation regarding online gambling, but as the activity spreads, new measures are being enacted. To combat the loss of taxes on gambling and betting due to its gamblers turning to offshore websites such as operators in Gibraltar, the UK has adopted a rule to tax online gambling based on the consumers' place of residence, effective in December 2014. The turnover of remote betting in the UK reached a medium double-digit figure in billions of Euros in 2013, as a significant single digit percent of males and a small percent of females in the UK gamble online. Laptop and desktop computers are still the leading devices used for online gambling, but the use of smartphones and tablets is increasing.

In France, online gambling and betting has been legal since 2010, but many gamblers turn to illegal sites. For example, a quarter of poker players chose to bet on unregulated networks. Apparently, because of the high taxes paid by the French regulated sites they have smaller budgets available to promote their services.

Italy has one of the most advanced regulatory arrangements regarding online gambling in Europe. Total online gambling revenue in Italy recently reached a high number in hundreds of millions of Euros, with poker constituting the largest segment.

Regulation of online gambling and betting in Germany and Russia lag some of their neighbors. Progress in online betting regulation in Germany is expected in 2014, as several operators have applied for the first online sports betting licenses. Once the licenses are obtained, the regulated segment is forecasted to generate several hundreds of millions EUR by 2017, while the non-regulated market in Germany will still be larger with a one-digit number in EUR billion in revenue. Meanwhile, legislation is currently being prepared to legalize online betting in Russia. Betting and gambling remains restricted to special administrated zones in Russia, with online gambling being illegal.

Online gambling and betting is spreading in the Asia-Pacific region. In Australia, which leads the world in terms of per person gambling, online sports betting and gambling has been growing by over 30% annually, while the growth of the total gambling market does not exceed 5%. Singapore restricts gambling generally, and the government is considering measures to also restrict online gambling, even though a third of Internet users in Singapore had gambled remotely at least once. In Japan, only the national lottery operator has a legal online betting site. A bill to legalize casinos was submitted to the Japanese parliament in 2013, with a decision expected early this year. Online gambling and betting is prohibited in China, with those accused of operating such sites on mainland China being prosecuted. However, gambling is allowed on the specially administrated territory of Macau, with some online gambling operators hoping online gambling would be legal there as well.

Online gambling is only starting to emerge in Africa. The first regulated online gambling website in Kenya was launched in 2013. In South Africa, online gambling awaits legalization in 2014.



Global Online Gambling & Betting Market 2014

Table of Contents (1 of 4)

1. MANAGEMENT SUMMARY

2. GLOBAL

- Online Gambling and Betting Trends, 2014
- Mobile Gambling and Betting Trends, 2014
- Social Gambling and Betting Trends, 2014
- Online Gambling Revenues, in USD billion, 2012 & 2018f
- Interactive Gambling Gross Win, in EUR billion, 2013e & 2018f
- Share of Interactive Gambling on Total Gambling Gross Win, in %, 2013e & 2018f
- Mobile Gambling Gross Win, in EUR billion, 2010, 2012 & 2018f
- Share of Mobile Gambling Gross Win on Total Interactive Gambling Gross Win, in %, 2010, 2012 & 2018f
- Number of Mobile Gambling Users, in millions, 2013e & 2018f
- Selected Leading Online Gambling and Betting Companies, 2014, Incl. Name, Description, Country of Registration and Financial Data

3. NORTH AMERICA

3.1 USA

- Online Gambling and Betting Overview and Regulation, 2014
- Top 5 Fastest Growing Site Categories, incl. Online Gambling, in thousand Monthly Unique Visitors, Ranked by in % Month-on-Month Growth, August 2013 vs. July 2013
- Online Gambling Win in New Jersey, in USD million, Share of Online Gambling Win on Total Gambling Win, in %, and Number of Online Gambling Accounts, in Units, December 2013 & January 2014
- Online Gambling Win in New Jersey, by Casino, in USD million, December 2013 & January 2014

3.2 CANADA

- Annual Government-Operated Online Gambling Revenues, by Lottery Tickets, Other and Total, by Province and total, in CAD million, 12 Months to March 2012



Global Online Gambling & Betting Market 2014

Table of Contents (2 of 4)

4. LATIN AMERICA

4.1 MEXICO

- Online Gambling and Betting Overview and Regulation, 2014

4.2 ARGENTINA

- Online Gambling and Betting Overview and Regulation, 2014

4.3 BRAZIL

- Online Gambling and Betting Overview and Regulation, 2014

5. EUROPE

5.1 EUROPE (REGIONAL)

- Gross Gambling Yield of Locally Licensed Online Gambling, in USD billion, and in % Year-on-Year Change, 2011 - 2017f
- Gross Gambling Yield of Total Online Poker, in USD billion, and in % Year-on-Year Change, 2011-2017f

5.2 UK

- Online Gambling and Betting Overview and Regulation, 2014
- Turnover and GGY of Remote Gambling and Betting, by Betting, Bingo, Casino, Pool Betting, 2009/2010 - 2012/2013
- Share of Individuals Who Bet, by Betting Type, Incl. "Online Betting/Bookmaker", by Gender, in %, 2012
- Devices Used for Gambling Online, in % of Online Gamblers, 2013



Global Online Gambling & Betting Market 2014

Table of Contents (3 of 4)

5. EUROPE (CONT.)

5.3 FRANCE

- Online Gambling and Betting Overview and Regulation, 2014
- Online Betting Gross Revenue and Bet Value, by Sports Betting and Horse Betting, in EUR million, 2012 & 2013
- Online Poker Gross Revenue, Cash Game Bet Value and Tournament Buy-In Value, in EUR million, 2010 – 2013
- Online Gambling and Betting Active Accounts, by Online Sports Betting, Online Horse Race Betting, and Online Poker, in thousands, 2011 – 2013

5.4 ITALY

- Gross Online Gambling Revenue, in EUR million, 2008 – 2012

5.5 GERMANY

- Online Gambling and Betting Overview and Regulation, 2014

5.6 RUSSIA

- Online Gambling and Betting Overview and Regulation, 2014

6. ASIA-PACIFIC

6.1 AUSTRALIA

- Online Gambling and Betting Overview and Regulation, 2014

6.2 SINGAPORE

- Online Gambling and Betting Overview and Regulation, 2014



Global Online Gambling & Betting Market 2014

Table of Contents (4 of 4)

6. ASIA-PACIFIC (CONT.)

6.3 JAPAN

- Online Gambling and Betting Overview and Regulation, 2014

6.4 CHINA

- Online Gambling and Betting Overview and Regulation, 2014

6.5 SOUTH KOREA

- Online Gambling and Betting Overview and Regulation, 2014

7. AFRICA

7.1 AFRICA (REGIONAL)

- Online Gambling and Betting Overview and Regulation, 2014



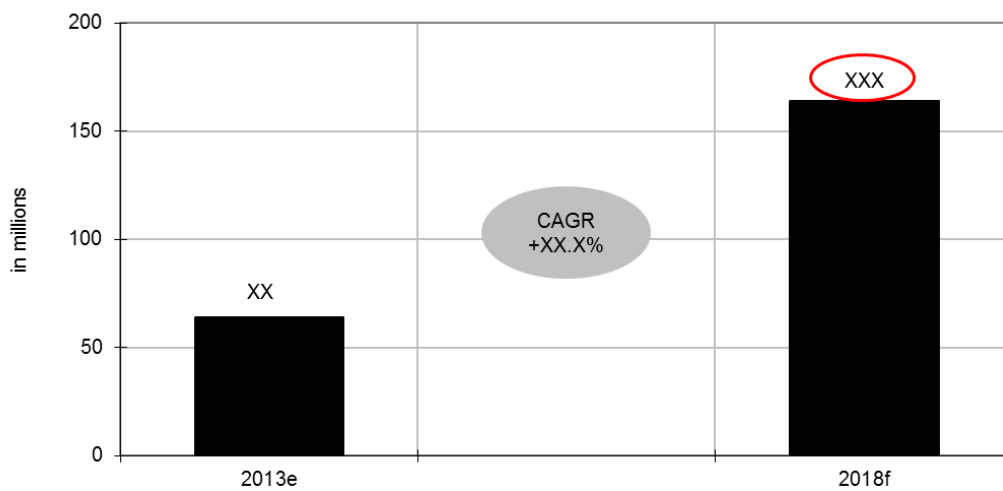
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Sample



Between 2013 and 2018, the number of people engaged in mobile gambling is estimated to grow by 100 mil., and reach XXX mil. in 2018.

Global: Number of Mobile Gambling Users, in millions, 2013e & 2018f



Source: revealed in the original report



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Methodology

General Methodology of our Market Reports:

- This report includes the results of secondary market research: By using various sources we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- This report covers the online gambling and betting market.
- Cross referencing of data was conducted in order to ensure validity and reliability.
- Besides providing information on the specific topic, every chart contains an Action Title, which summarizes the main statement of the chart and a Sub Title, which gives information about the country, the topic, the unit or currency, and the time period the data on the chart refers to.
- Furthermore, the source of information and its release date are provided on every chart. It is possible that the information included in one chart is derived from several sources. Then, all sources are mentioned on the chart.
- This report also includes rankings. Within these rankings, it is possible that the total amount adds up to more than 100%. If this is the case, multiple answers were possible, and this is then mentioned in the note of the chart.
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note also contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, currency is generally mentioned as stated in the source. When referencing money in the Action Title, the EUR values are also provided in brackets. The conversions are always made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.
- This report includes mainly data from the last 12 months. The exact publication dates are mentioned in every chart.

Methodology for our Global Online Gambling and Betting Market 2014:

- This report contains a Management Summary, summarizing the main information provided in each chapter.
- Chapter number two of this report covers global developments, such online, mobile and social gambling and betting trends, online and mobile gambling revenues and shares of total, gambling users, and leading online gambling and betting companies.
- The remaining chapters are divided by region: North America, Latin America, Europe, Asia-Pacific, Africa. In the Europe and Africa sections, charts about regional development were included.
- In the each regional chapter, countries are presented as follows: Countries with regulated or partially regulated online gambling and betting market are presented first, if available, with the country with the largest online gambling and betting revenues presented in the beginning and further countries following in the descending order. Countries with unregulated or banned online gambling and betting are presented next.
- Depending on data availability, market and regulation overviews and trends, revenues and information about gamblers were included for the regulated markets. For the countries with a ban on online gambling and betting, regulatory overviews and trends were covered.



Global Online Gambling & Betting Market 2014

Frequently Asked Questions

WHAT IS THE TARGET AUDIENCE FOR THE MARKET REPORTS?

The target group of our B2C E-Commerce reports are decision makers in top-management, for example from the departments E-Commerce, Business Development, Strategy, Marketing, etc. from large corporations worldwide.

WHAT TYPE OF RESEARCHERS ARE FINDING THE INFORMATION FOR OUR MARKET REPORTS?

yStats.com employs multilingual researchers that research and filter all sources and translate the relevant information into English. This ensures that the content of the original sources is correctly interpreted.

WHERE CAN I SEE WHAT KIND OF INFORMATION IS INCLUDED IN THE MARKET REPORTS?

For every market report, a detailed Table of Contents is available, clearly stating what information is included. All Table of Contents can be found on our homepage and in the product brochures of the market reports.

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Due to the fact that the information included in the market reports is derived from different sources, some information is not comparable across countries. Different sources mostly have different definitions.

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Global Online Gambling & Betting Market 2014

Quotes of our Customers

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Chief Operating Officer – Markets and Operations
Avira GmbH: Leading European Software Company

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Dr. Marcus Ackermann
Member of the Executive Board
Bonprix: Leading Online Shopping Company

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Selected References

Internet, Consulting, Retail, Finance and Other Companies

Internet

- Google
- Amazon
- eBay
- Avira
- Skype
- Digital River
- First Data
- Citrix Online
- Wirecard
- 1 & 1
- Skrill / Moneybookers
- Deutsche Telekom
- CyberSource
- bwin Interactive Entertainment
- Brightcove

Consulting

- Boston Consulting Group
- Deloitte
- Bain & Company
- Accenture

Retail

- OTTO Group
- Costco
- Tchibo Direct
- Diesel

Finance

- Goldman Sachs
- Credit Suisse
- Morgan Stanley
- Bank of America Merrill Lynch
- Citigroup
- Oppenheimer & Co.

Other

- Red Bull
- BASF
- Lego
- Beiersdorf
- Xerox



Global Online Gambling & Betting Market 2014

Selected Reports

Report	Publication Date	Price (excl. VAT)*
Global Online Gaming Market Snapshot 2014	March 2014	€ 950
Europe Online Gaming Market 2014	March 2014	€ 1,450
Global Online Gaming Market 2014	February 2014	€ 2,950
Global Mobile Gaming Market 2014	February 2014	€ 1,950
Global Mobile Payment Methods 2013	December 2013	€ 3,950
Global Online Payment Methods 2013 - Second Half 2013	November 2013	€ 3,950
MENA B2C E-Commerce Report 2014	January 2014	€ 2,950
Africa B2C E-Commerce Report 2013	December 2013	€ 2,450
Europe Online Payment Methods 2013 - Second Half 2013	December 2013	€ 2,950
Latin America B2C E-Commerce Report 2013	November 2013	€ 2,450
Europe B2C E-Commerce Report 2013	September 2013	€ 3,950
Asia B2C E-Commerce Report 2013	February 2013	€ 4,450

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Future Reports

Report	Planned Date	Price (excl. VAT)
Global Cross-Border B2C E-Commerce 2014	First Half 2014	To be announced
Smartphones and Tablets in Global B2C E-Commerce 2014	First Half 2014	To be announced
Global Online Payment: First Half 2014	First Half 2014	To be announced
Global B2C E-Commerce 2014: Emerging Markets	Second Half 2014	To be announced
Global B2C E-Commerce 2014: Mature Markets	Second Half 2014	To be announced
Global Online Payment: Second Half 2014	Second Half 2014	To be announced



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Global Online Gambling & Betting Market 2014

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5.2 We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated.

5.3 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, perpetual right to use the products provided for your internal purposes or any additional purposes set out in the Order Form.

5.4 In the event that the parties agree on a „Single User License“ under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a „Site License“ under the Order Form, this means that up to ten (10) users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a „Global Site License“, this means that up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term „organization“ refers to your specific company only and excludes any third parties, including affiliates.

6. TECHNICAL INFORMATION

6.1 We shall provide our products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.

6.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.

6.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto within two (2) business days.

7. DEFECTS AS TO QUALITY

7.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.

7.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.

7.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.

7.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

7.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

8. LEGAL DEFECTS

8.1 We are liable for products and services infringing on third party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.

8.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order.

8.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests: a) procuring for the customer the right to use the service; or b) revising the service to render it free of legal violations.

8.4 Upon our request, the Customer shall assist us with the defense against third party claims according to this section 8, with each of the Parties bearing the costs of the use of its own personnel and counsel.

8.5 Claims the Customer may hold for legal defects expire in accordance with Section 7.4.

8.6 Claims for damages and the reimbursement of expenditures are further subject to Section 9.

9. LIABILITY

9.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.

9.2 Besides Section 9.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance.

9.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.

9.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.

9.5 Our liability for damages under warranties (Beschaffenheitsgarantien) is limited to instances in which the warranty expressly includes such liability.

9.6 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 9.1 through 9.5.

10. CONFIDENTIALITY

10.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:

- a) were already known or accessible to any third party at the time of disclosure;
- b) which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;
- c) must be disclosed by order of and to a government agency or another competent third party; and
- d) must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.

In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.

10.2 We may use your company name and logo as a reference so long as no contractual details are divulged.

11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

11.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.

11.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.