Global Online Gambling and Betting Market 2015

General Information

Product Details

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Questions Answered in This Report

- What is the size of the global online gambling and betting market?
- Who are the major competitors in global online gambling and betting?
- How does online gambling and betting market and regulation develop in various regions and countries?
Global Online Gambling Sees Steady Growth and New Regulations

The global market for online gambling is forecasted to maintain one-digit growth rates over the next four years, expected to reach a medium-high, double-digit number in billion Euros revenue. One trend in online gambling is the use of mobile devices. Some gambling sites report increasing shares of their total revenues stemming from mobile and gambling search words, which are increasingly originating from phones and tablets. Another important factor is a wave of acquisition deals which has taken place in the past two years; for example, Canada-based Amaya Gaming Group acquiring the parent company of PokerStars and Full Tilt Poker. The performance of the leading global companies in the online gambling and betting segment varied last year, with William Hill and Paddy Power showing growth rates in online net revenues of close to +20%, while Betfair showed only moderate growth and Bwin.Party registered a decline in total revenues.

Europe was the largest online gambling market in the world, owing to a large number of countries with established regulations regarding this sector. This number is set to increase, as countries like the Netherlands adopt new online gambling regulations, seeking additional tax revenues. Across the UK, France and Spain, betting, in particular sports betting, was the largest segment of the online gambling market in 2014, while in Italy it was outperformed by casino games. In Germany, the co-existence of separate gambling regimes in the state of Schleswig-Holstein and the rest of the country was upheld by the ECJ in 2014. In Russia, online gambling remained illegal, but a separate regime is being formed for online betting under a self-regulatory organization and the nature of online poker was debated.

In the Asia-Pacific region, some governments have gone to lengths to limit online gambling. In Singapore, all forms of remote gambling were forbidden under new regulations in 2015, and in China and South Korea, a number of organizers of illegal online gambling websites were arrested. In Australia, where the regime is more liberal, foreign companies are particularly attracted by the interactive betting sector.

In the USA, of the three states allowing online gambling, New Jersey generated by far the largest revenues in 2014. More states are expected to adopt rules concerning online gambling as revenues continue to grow, though at a somewhat more moderate level than was forecasted a year ago. In Latin America, in both Brazil and Mexico, new bills were put forward in the legislature to regulate online gambling, but the legislation has not yet been approved. Meanwhile, on the African continent, the government of South Africa, regional leader in land-based gambling revenues, announced in early 2015 that it had no plans to legalize online gambling despite calls to do so.
1. MANAGEMENT SUMMARY

2. GLOBAL
- Online Gambling and Betting Trends, 2015
- Breakdown of the Total Gambling Revenues, by Segments, incl. Online, in % and in USD billion, 2014
- Online Gambling Revenues, in USD billion, 2012, 2013 & 2017f
- Online Gambling Revenues, in EUR billion, 2014 & 2018f
- Breakdown of Global Online Gambling Revenues, by Onshore and Offshore, in EUR billion, by Global, Europe and Asia, 2009 – 2013
- Breakdown of Global Online Gambling Revenues, by Sectors, in %, 2013
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- Overview of Top 10 Online Gambling Companies by Market Capitalization, incl. Segment, Country of Registration and Revenues, April 2015
- Top 10 Gambling Websites, by Website Rank, April 2015

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- Overview of Online Gambling and Betting Market and Regulation, April 2015

3.2. UK
- Overview of Online Gambling and Betting Market and Regulation, April 2015
- Share of Individuals Participating in Online Gambling, by Gender and Age Group, by Any Type of Online Gambling and Online Gambling Except National Lottery Only, in %, 2012 – 2014
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- Online Gambling and Betting Active Accounts, by Online Sports Betting, Online Horse Race Betting, and Online Poker, in thousands, 2011 – 2014

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- Share of Mobile on Total Online Gambling Expenditure, in %, 2013
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- Online Gambling Revenues in New Jersey, by Segment, in USD million, January 2014 - March 2015
- Interactive Poker Win in Nevada, in USD thousand, January 2014 - November 2014
- Online Gambling Revenues in Delaware, by Segment, in USD thousand, January 2014 - March 2015
- Rank of Online Gambling Companies in New Jersey, by Total Internet Gambling Win, in USD million, 2014

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#### 6.3. BRAZIL
- Overview of Online Gambling Market and Regulation, April 2015

### 7. AFRICA

#### 7.1. REGIONAL
- Overview of Online Gambling Market and Regulation, April 2015
The number of online poker accounts in France decreased from 300,000 to 246,000 between 2011 and 2014, while sports betting accounts grew.

France: Online Gambling and Betting Active Accounts, by Online Sports Betting, Online Horse Race Betting, and Online Poker, in thousands, 2011 - 2014

Borgata Hotel Casino & Spa was the largest online gambling company in New Jersey by total internet gambling win in 2014.

USA: Rank of Online Gambling Companies in New Jersey*, by Total Internet Gambling Win, in USD million, 2014

*only companies operating legally under the state license were included
Source: Department of Gaming Enforcement, 2015
General Methodology of Our Market Reports:

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Sub Title, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.
- Reports are comprised of the following elements, in the following order: Cover page, preface, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.
- 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, local currencies are most often used. When referencing currency values 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.
- The reports include mainly data from the last 12 months prior to date of report publication. Exact publication dates are mentioned in every chart.

Methodology of Our Global Online Gambling and Betting Report:

- The opening chapter of this report covers global developments, such as online gambling and betting trends, online gambling revenues, share of online in total gambling revenues, breakdown by regions and segments. Moreover, an overview of the leading online gambling and betting companies is included, featuring revenues data.
- The remaining chapters are divided by regions: Europe, Asia-Pacific, North America, Latin America, Africa. The regions are presented in the order of importance, based on the regulation, market value and potential. In the Europe and Africa chapters, also charts about regional development are included.
- Within each region, major countries are covered, following an order 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 last.
- Depending on data availability, market and regulation overviews and trends, revenues and information about gamblers are included for the regulated markets. For the countries with a ban on online gambling and betting, regulatory overviews and trends are covered.
# 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 SOURCES ARE USED FOR THE MARKET REPORTS?
The reports are all based on reliable sources including national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other sources.

## 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.

## WHAT TYPE OF ANALYSTS ARE WRITING THE MARKET REPORTS?
After the information is researched, it is further analyzed by our international team of research analysts. These analysts have a long experience in the field of E-Commerce research, and they understand the specifications of the market.

## 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.

## IS THE INFORMATION IN THE MARKET REPORTS COMPARABLE FROM COUNTRY TO COUNTRY?
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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In general, the market reports are only sold as a whole. However, if you are only interested in parts of the report, please contact us.

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## REGARDING THE TIMING, WHEN WILL AN UPDATE OF A MARKET REPORT BE PUBLISHED?
In general, the market reports are published on a yearly basis. For further information, please take a look at the report overview, which includes a list of the reports we plan to publish in 2014. If you would like to be informed as soon as the update is published, please inform us.

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- First Data
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- Citigroup
- Oppenheimer & Co.

Other
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7. NO LIABILITY

7.1. 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 contract.

7.2. In the event of a default, you shall have a right of offset to the extent of the saveable legal stipulations a longer period in case of intentional or grossly negligent neglect of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

7.3. 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/or the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order Form.

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 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 clause 8.3, in which case the Customer shall bear all costs associated with the defense, unless agreed otherwise in writing.

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, liable purely pursuant to applicability.

9.2. In cases of minor negligence (including breaches of contract), we assume liability in so far as we have been aware of the risk of damage incurred and that we have not taken suitable measures to prevent the damage. In this context, all data and information materials, which are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services rendered by the relevant Order. This duty of confidentiality excludes data and information materials that:

9.3. In case of a negligent breach of a material contractual obligation our liability for damages - except for damages resulting from death, bodily harm or health - is limited to typical and at the time of the formation of this Contract foreseeable damage.

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

9.5. Our liability for damages under warranties (beschaffenheitssicherheit) is limited to instances in which the warranty explicitly 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, shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:

11. JURISPRUDENCE, GOVERNING LAW, MISCELLANEOUS

11.1. In Contracts with merchants, personal laws under public law, or special assets (Sondervermögen) under public law, disputes arising from or in connection with any Contract between the Parties shall exclusively be decided by the courts of Hamburg, Germany. Governing law is German law with the exclusion of the Oder.

Phone: +49 (0) 40 - 39 90 68 50
Fax: +49 (0) 40 - 39 90 68 51
info@ystats.com
www.ystats.com