EUROPE ONLINE GAMBLING MARKET 2019
GENERAL INFORMATION

PRODUCT DETAILS
Title: Europe Online Gambling Market 2019
Type of Product: Report
Category: Online Gambling
Covered Regions: N/A
Covered Countries: Denmark, Finland, France, Germany, Italy, Norway, Russia, Spain, Sweden, UK
Language: English
Formats: PDF & PowerPoint
Number of Charts: 70

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QUESTIONS ANSWERED IN THIS REPORT
What is the forecast for the global online gambling and betting market revenues by 2023?
How high is Europe's share of the global online gambling market?
Who are the major players in the global online gambling market in Europe?
Which are the leading sectors of online gambling across Europe?
What are the main market trends affecting the development of online gambling in Europe?

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EUROPE HOLDS OVER HALF OF THE GLOBAL ONLINE GAMBLING MARKET

Taking the largest share of the global online gambling market, Europe will continue its growth as a global market contributor. Legislation and legalization have played a role in this process, opening up more legal marketplaces for online gambling. Online gambling penetration in the EU is expected to grow through 2020, as quoted in the yStats.com report.

Online gambling consistently makes up a larger share of the global gambling market year after year. Since 2016, global online gambling revenues have experienced double digit growth and this trend is set to persist through 2023, according to a statistic cited in the yStats.com report. The European market adds a great deal of value to the overall global market and exhibits regular revenue growth as well.

The United Kingdom is the largest and the most active market for online gambling in Europe. The British online gambling platform bet365 is also a market a leader in Germany, Italy, Spain, and Denmark, ousting local marketplaces in some countries. In terms of expansion, Italy and France’s online gambling markets have been growing rapidly, in regards to numbers cited in the yStats.com report.
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The remote sector accounted for nearly one-third (37%) of the gross gambling yield in the UK in the period from Apr. 2017 to Mar. 2018.

Definition: Remote gambling is gambling in which persons participate in the use of remote communication including the Internet, telephones, wireless, SMS and any other kind of electronic or other means of facilitating communication.

Source: Gambling Commission, September 2018

The online casino market in Italy was led by Pokerstars with a market share of 9.59%, as of 2018.

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<tr>
<th>Operator</th>
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<td>Pokerstars</td>
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<td>Ewargaming</td>
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<tr>
<td>888 casino</td>
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<td>Totalbet</td>
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<tr>
<td>Betfair</td>
<td>1.43%</td>
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Source: iGaming, January 2018
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Secondary Market Research
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- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

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- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.

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- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, 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.

Notes and Currency Values
- 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.

METHODOLOGY OF OUR EUROPE ONLINE GAMBLING MARKET 2019

Report Coverage
- This report covers the online gambling and betting market in Europe. Major advanced and emerging markets in this region are covered, including Denmark, Finland, France, Germany, Italy, Norway, Russia, Spain, Sweden, and the UK. A broad definition of online gambling and betting is taken into account, including the total value of gambling and betting deposits, winnings and gross gambling revenues.
- The report contains relevant information about international comparisons, market trends, the total value of gambling and betting deposits, winnings and gross gambling revenues, online gamblers and gambling operators.
- Besides regional and country data, information about global development is also included in this report.

Report Structure
- The opening chapter of the report is devoted to global development, including as online gambling and betting trends, online gambling revenues, share of online in total gambling revenues, breakdown by regions and segments.
- The rest of the report is divided into country chapters. The countries are presented in the order of importance, based on the regulation, market value and potential.
- Depending on data availability, market trends, revenues and information about gambling are included for the regulated markets.
EUROPE ONLINE GAMBLING MARKET 2019

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<tr>
<td>STATE/PROVINCE</td>
<td>POSTAL CODE</td>
<td>COUNTRY</td>
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HOW DID YOU FIND US?

- Search Engine (Google, Bing etc.)
- Print/Online Publication
- Press Release
- LinkedIn/XING
- Facebook/Twitter
- Personal Recommendation
- Other

SIGNATURE

All orders are subject to the Terms & Conditions and Privacy Policy contained on our website. All reports are provided in PDF and PowerPoint formats. yStats.com may contact you in the future about receiving our free newsletter or other mailing. If you do not wish to be contacted, please advise us accordingly. Your contact information will not be sold or shared with other organizations.

* Please be advised that when purchasing a report, you have the option to choose between a Single User License (allowing one single user access to the report), a Site License (allowing up to 10 users in a particular geographic location access to the report), or a Global Site License (allowing up to 10 users of a company worldwide to access the report). Please choose the license that suits your needs best. Failure to comply with our Terms and Conditions with respect to appropriate license usage may result in legal action.

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Behringstr. 28a  22765 Hamburg  Germany  yStats.com GmbH & Co. KG © 2015
TERMS AND CONDITIONS

yStats GmbH & Co. KG provides its services exclusively to contracting partners and users of its website according to Sec. 14 German Civil Code (Bundesgesetzblatt 1998) subject to the following Terms and Conditions. By visiting our website, you agree to the terms and conditions given generally by yStats GmbH & Co. KG, which includes the terms and conditions between yStats GmbH & Co. KG and you. Terms and Conditions are subject to change at any time without prior notice, based on the discretion of yStats GmbH & Co. KG, the most current of which are readily available on our website.

1. SCOPE

1.1. The following terms and conditions apply to our entire contract (the “Contract”) between yStats GmbH & Co. KG and you. Terms and Conditions are subject to change at any time without prior notice, based on the discretion of yStats GmbH & Co. KG, the most current of which are readily available on our website.

2. REPORT AND FULL ACCESS SUBSCRIPTION OFFERS & ORDERS

2.1. With effect from the Effective Date, the subscription rates for the products may be changed. All subscription rates are subject to change at any time without prior notice, based on the discretion of yStats GmbH & Co. KG, the most current of which are readily available on our website.

2.2. After the Effective Date, you will receive an invoice via email and the Report will be available for online download.

2.3. You may cancel your subscription at any time, and shall be entitled to a pro-rata refund of the paid amount, including any applicable VAT.

2.5. Your subscription shall be renewed automatically every year unless you notify us in writing of your intent to cancel your subscription at least sixty (60) days before the renewal date.

3. CUSTOMER PURCHASE OPTIONS

3.1. Unless expressly agreed upon otherwise in writing, the contents of our offers may not be made available in whole or in part to any third-party outside your organization.

4.1. All prices for online offers are to be exclusively derived from the Report Order Form and the documents referenced therein. All prices for orders placed via the online shop is those which are displayed on our website.

4.2. Payment is due upon delivery of the goods or services provided. Unless otherwise agreed in writing, all contracts shall be paid in advance and non-cancelable.

5.1. Customer is required to pay for the full order amount once the invoice is issued. Payment is due within 30 days of the invoice date. If payment is not received within the specified period, interest will be charged on the outstanding amount at a rate of 8% per annum from the due date.

6. CONFIDENTIALITY

6.1. The Parties shall be held in strict confidence for a period of 10 years of the execution of the Contract regarding all data and information of which they know as part of a Contract, be it orally, in writing, in any form, and under any circumstances.

6.2. Any information supplied under this Contract is of a confidential nature and is strictly confidential and shall be treated as such.

6.3. The Parties shall take all reasonable steps to ensure that the Confidential Information is not disclosed to any third party.

7. LIABILITIES OF THE PARTIES

7.1. Neither party shall be liable to the other for any loss or damage, whether direct, indirect, special, consequential or incidental, arising out of the use of or the inability to use the Confidential Information.

8. LIMITATION OF LIABILITY

8.1. The total liability of the Parties under this Agreement shall be limited to the total amount paid by the Customer for the Confidential Information.

9.2. The Customer agrees to release, indemnify and hold harmless the Company from any loss, liability, cost or expense arising out of any claim, suit or proceeding that is reasonably related to the confidentiality agreement.

10. Governing Law and Jurisdiction

10.1. This Agreement shall be governed by and construed in accordance with the laws of Germany, without giving effect to any choice or conflict of law provision or rule that would cause the application of the laws of any other jurisdiction.

10.2. Any dispute, controversy or claim arising out of or relating to this Agreement, or the breach, termination or validity of this Agreement, shall be settled by arbitration in the same manner as the parties have agreed to settle any controversy or claim arising out of or relating to this Agreement.

10.3. The arbitration shall be held in Hamburg, Germany, and shall be conducted in accordance with the rules of the International Chamber of Commerce (ICC) then in force.

10.4. The decision of the arbitrators shall be final and binding on the parties, and judgment may be entered upon the award in any court having jurisdiction thereof.

11.1. The Parties are subject to the applicable laws of Germany, as a court of competent jurisdiction for all disputes and controversies arising out of or relating to this Agreement.

11.2. In the event of any dispute arising between the Parties, the Parties agree to use their best efforts to resolve the dispute through negotiations.

11.3. If the Parties are unable to resolve the dispute through negotiations, the Parties agree to submit the dispute to arbitration in accordance with the rules of the International Chamber of Commerce (ICC) then in force.

11.4. The Decision of the arbitrators shall be final and binding on the Parties.

11.5. The Parties further agree that any final award rendered by the arbitrators shall be in addition to and not in lieu of any rights that either Party may have under this Agreement.

11.6. The Parties agree that all communications with respect to this Agreement, including any notices, requests, or demands, shall be in writing and shall be deemed to have been made when delivered by personal delivery, postage, or by recognized courier service or electronic mail.