

Online Gaming and Betting - UK - October 2013

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"Sportsbook and smartphone gambling remain the main drivers of the online gaming and betting market, but the rapid pace of growth seen in each segment means the industry is already having to think about where they go in the long term."

– David Walmsley, Senior Leisure Analyst

This report looks at the following areas:

- Is the smartphone's market dominance inevitable?
- Can the tablet carve out its own share of the market?
- Will marketing take a hit under point-of-consumption regulation?
- How can online gaming and betting attract more female players?
- Why can the market no longer take young people for granted?
- Is social gaming any closer to take-off?

The UK online gaming and betting market has enjoyed another period of impressive value growth during 2013, driven primarily by continued rising interest in sports betting and smartphone use.

Both those segments still have plenty of headroom in which to expand further over the short to medium term, and social media sits on the horizon as a potential source of significant future business.

However, the industry also has a number of issues to address along the way, ranging from the potential risks of smartphones remaining a second-choice screen to concerns about promoting gambling to underage social media users and the long-term impact on the market's shape and promotional focus of the forthcoming move to PoC (point-of-consumption) regulation and taxation.

This report assesses current trends in participation in gaming and betting online, examines the factors influencing present and potential future patterns of play and identifies ways in which remote gambling operators can respond to the opportunities and challenges ahead.

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