

Online Gaming and Betting - UK - October 2011

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“The growth of online leisure, the move into the mainstream of gambling in general and the increasing role web-based technology plays in our everyday lives have enabled internet gaming and betting to grow at a rapid pace over the last five years.

Developing technologies such as smartphones and tablets are creating new platforms on which innovative operators can attract new players and the opening up of social media will introduce a major new marketing channel for those who can build the right tools to foster engagement. At a more macro level, proposed changes to the regulation and taxation of UK-facing businesses will introduce new challenges and intensify competition in a market where share is already becoming an increasingly important battleground.”

– Matt King, Head of Leisure Research

In this report we answer the key questions:

- What are the opportunities being created by mobile gambling growth?
- What is the potential of tablets like the iPad?
- How can operators use social media to enable market growth?
- How might changes to regulation and taxation affect the market?
- How are changes in the make-up of the market driving operators’ promotional strategies?
- What challenges and opportunities are consumer attitudes creating?

Definition

This report examines the market for online gambling in the UK, primarily concentrating on gambling via PC, but also looking at gambling via mobile phone, tablets such as the iPad and interactive TV. The main focus of the report is activities where the consumer plays against the house, therefore excluding games such as poker, where players bet against each other and the house simply takes a rake or fees in exchange for hosting the games, although betting exchanges are included within the sports betting vertical. Poker is also included in market size and segmentation calculations for means of comparison.

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EMEA: +44 (0)20 7778 7151
Americas: +1 (312) 932 0600
APAC: +61 (0)2 8284 8100