



Global E-Commerce Intelligence
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SAMPLE REPORT
EUROPE ONLINE GAMBLING MARKET 2019
PUBLICATION DATE: JANUARY 2019

PREFACE

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- yStats.com provides secondary market research: By using various sources of information we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- Only reliable sources such as national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries and news portals are used as a basis for the analyses, statistical reports and forecasts.
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GENERAL METHODOLOGY OF MARKET REPORTS

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Secondary Market Research

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are 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 reported 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.
- 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.

Definitions

- 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.

Chart Types

- 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 Subtitle, 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.

Report Structure

- 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 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 THE CURRENT REPORT



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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 gamers 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 gamblers are included for the regulated markets.

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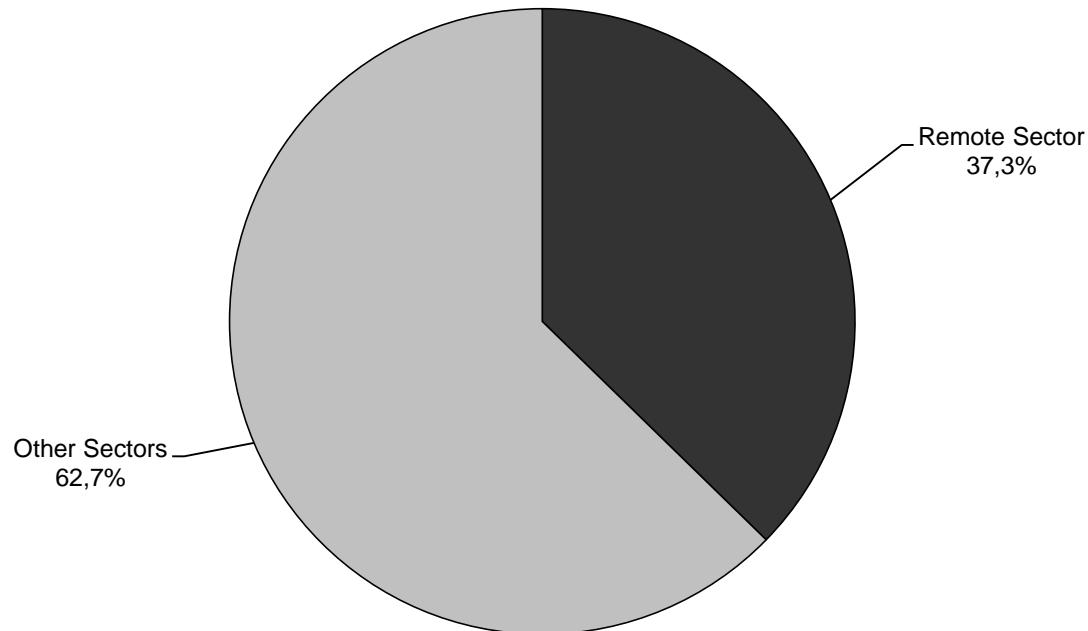
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The remote sector accounted for nearly one-third (37%) of the gross gambling yield in the UK in the period from Apr. 2017 to Mar. 2018.

UK: Share of the Remote Sector, in % of Total Gross Gambling Yield, April 2017-March 2018



Definition: Remote gambling is gambling in which persons participate by the use of remote communication including: the internet, telephone, television, radio and any other kind of electronic or other technology for facilitating communication.
Gross Gambling Yield is the amount retained by operators after the payment of winnings but before the deduction of the costs of the operation.

Source: Gambling Commission, December 2018

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

Italy: Top 15 Operators in Online Casino by Market Share, in %, 2018

Operator	Market Share
POKERSTARS	9.59%
LOTTOMATICA	8.64%
SISAL	8.17%
EUROBET	6.76%
BWIN	5.65%
888	5.61%
WILLIAM HILL	4.64%
SKS365	4.01%
GREENTUBE	4.00%
STARCASINO	3.53%
INTRALOT/GOLDBET	3.69%
BET365	2.57%
ADMIRAL INTERACTIVE	2.24%
BETALAND	2.09%
BETFAIR	1.41%



Global E-Commerce Intelligence
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ADDRESS

yStats.com GmbH & Co. KG
Behringstr. 28a | 22765 Hamburg | Germany

CONTACT

Phone: +49 40 - 39 90 68 50 | Fax: +49 40 - 39 90 68 51 | info@ystats.com

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