MECN
Media & Entertainment Consulting Network

Online Gambling Quarterly Report – Winter 2019/2020 Edition

Comprehensive quarterly report analysing updated benchmarks, KPIs, trends, ... covering all sectors of the online gambling industry

Q4/2019 analyses incl. Q3/2019 financial data

London/Munich, December 2019

Summary

Based on our well-received Online Gambling Benchmarking Study, we have been asked by many clients to monitor the online gambling industry also on a quarterly basis. We are happy to comply with this request and are now publishing our Online Gambling Quarterly reports.

We are happy to announce the release of our newest Quarterly Online Gambling Report - Winter 2019/2020 Edition. In addition to the financial analyses, our quarterly report again covers many online gambling industry benchmarks, KPIs, and topics from key company sectors, such as finance, marketing, strategy, ...

Content of report

This new regular report offers unprecedented insights into the industry, including:

- **Strategic issues** – Strategic topics, such as overall industry climate, trends, stock development, ...
- **Financial benchmarks** – Quarterly (Q3/2019) revenue benchmarks (net revenue, gross revenue / gross win, growth, margins, ARPUs, ...) broken down by segments/verticals, EBIT benchmarks, ...
- **Marketing benchmarks** – Social benchmarks (e.g., number of Facebook Likes and Twitter Followers, ...), SEO benchmarks (e.g., Google ranking analyses in key countries and segments), affiliate marketing benchmarks (e.g., top online gambling advertisers/brands on affiliate websites), …
- **Product-related topics and benchmarking** – Growth potential for selected products (incl. social and mobile), benchmarking of product offers, such as number of bets, casino games, ...
- **Analyses of regions and regulated markets** – Regional analyses, such as in-depth coverage of regulated markets (France, Denmark, Spain; New Jersey) including quarterly revenues, ARPUs, ...

In total, the report has ca. **60 pages** and more than **100 graphs/exhibits**.

More **detailed insights** will be presented in our regular mailings (to subscribe, click here).

Contents

Part 1 - Trends
- Online gambling industry climate
- Future “winners” in the online gambling market
- Key trends and topics
- Mobile gambling KPIs
- Share developments
- Analyst recommendations

Part 2 – Financial Figures and KPIs
- Total revenue
- Betting revenue
- Casino revenue
- Active players/customers and ARPUs
- EBIT / operating profit benchmarks

Part 3 – Marketing Analyses
- Social marketing benchmarks
- SEO benchmarking
- Affiliate marketing benchmarking

Part 4 – Product Analyses
- Betting offers
- Football/soccer bets
- Other sports – tennis, basketball, …
- Live/in-play betting
- Casino games/offers

Part 5 – Regulated Markets Analyses
- Overview of regulated markets
- French online gambling market
- Spanish online gambling market
- Danish online gambling market
- New Jersey online gambling market

Part 6 – Methodology

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List of mentioned/analysed companies

Bet-at-home
Betsson
Better Collective
Catena Media
Churchill Downs
Evolution Gaming
France total (ARJEL)
Gambling.com Group
Gamesys
GIG B2C
Global Gaming
GVC Online
Jackpotjoy
Kambi
Karamba
Kindred
LeoVegas
Lotto24
Lottomatica
Net Gaming
NetEnt
PPB (Flutter) Online
Scout Gaming
Sisal
Spain total (DGOJ)
Stars Group
Svenska Spel
Vera&John
William Hill Online
Zeal / Tipp24
…

About authors and contact information

MECN is a network of experts on issues concerning the media and entertainment industry. Together we provide in-depth knowledge, analysis, and advice to global clients. For the gambling industry, we provide market insights and strategic support to various clients ranging from bookmakers to state/public operators.

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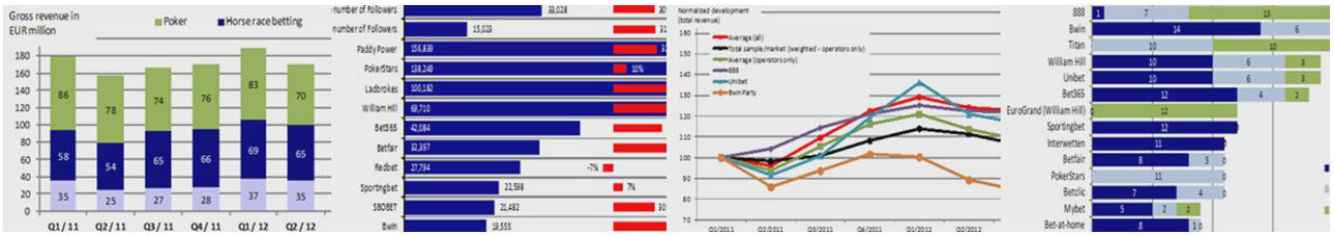

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