



Online Gambling Quarterly Report – Summer 2018 Edition

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

Q2/2018 analyses incl. Q1/2018 financial data

London/Munich, June 2018

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 - Summer 2018 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, forecasts, analyst recommendations, stock development, ...
- **Financial benchmarks** – Quarterly (Q1/2018) 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, lotto and numbers games, ...
- **Analyses of regions and regulated markets** – Regional analyses, such as in-depth coverage of regulated markets (France, Spain) including quarterly revenues, ARPUs, ...

In total, the report has ca. **70 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 recommendation
- Revenue forecasts

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 (incl. mobile)

Part 5 – Lottery Analyses

- Lotto, numbers, and scratch games
- Website analyses of state lotteries
- State lottery Facebook analyses
- State lottery Twitter analyses

Part 6 – Regulated Markets Analyses

- Overview of regulated markets
- French online gambling market
- Spanish online gambling market

Part 7 – Methodology

- Relevant considerations for the social marketing benchmark analyses
- Overall SEO benchmarking approach
- Betting offers - benchmarking approach
- Financial analyses approach

List of mentioned/analysed companies

Ahaworld	Kindred
Aspire Global B2C	LeoVegas
Bet-at-home	Lotto24
Betsson	Lottomatica
Catena Media	Mr Green
Cherry Online Gaming	Net Gaming
Churchill Downs	NetEnt
Evolution Gaming	Paddy Power Betfair Online
France total (ARJEL)	Spain total (DGOJ)
Gaming Innovation B2C	Stars Group
Global Gaming	Vera&John
GVC	William Hill Online
JackpotJoy	Zeal / Tipp24
Jackpotjoy Group	...
Kambi	

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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