

Online Gambling Trends

The guide to the future of online gambling

Trends, insights, and objective analysis on what will drive the online gambling market now and in the future

London/Munich, June 2010

Go to www.online-gambling-trends.mecn.net to obtain full report.

In cooperation with the following legal experts:



Summary

Currently, the online gambling market is awash with new industry trends and issues: liberalisation, consolidation, B2B/B2G, U.S. market, mobile betting, ... to name just a few. But which trends are relevant (and for whom), which ones are just hype, and what are the figures/analyses behind the trends, ...? For the most part, the answers provided to the above questions have been vague and subjective for the following reasons:

- **Heavy lobbying** - The industry is still developing, and therefore advocacy and interest groups are heavily lobbying the industry resulting in hundreds of published press releases, sponsored studies, and speeches at conferences.
- **Publicly traded companies dominate the information flow** - The PR and IR departments of publicly traded operators and technology/service providers provide the bulk of information for the industry media, ... - therefore these firms dominate the discussion in the public arena. And although publicly traded companies might represent much of the market activity, many issues/trends that are hotly debated are sometimes not relevant for the industry as a whole.

Therefore, MECN wants to shed some light on the situation with an objective study.

Content of report

The report analyses some of the most relevant topics in the online gambling market – such as:

- **Liberalisation** – Effects of market liberalisations, blessing or curse?
- **Consolidation, mergers, and acquisitions ahead** – Much more than only PartyGaming & Bwin!?!?
- **B2B and B2G** – Real and sustainable growth driver or “last option to grow”?
- **Products and channels to come** – Mobile, iPad, live betting, online lotteries, instant, MMOGs, ... – which will stay a niche product and which will become relevant?
- **U.S., Asia, India, ...** – Near-term reality or only wishful thinking – the regions to watch.
- **Market players** – Future role of state lotteries and incumbents, media companies, local operators.
- **The movers and shakers** – The fastest growing gambling websites in the past 12 months.
- ...

The report also includes unique insights we gathered from our **survey of more than 100 market insiders and operators**.

In total, the report has more than **190 pages** and **96 graphs/exhibits**.

In order to provide such extensive analyses, we **teamed up with some of the best in the industry**, including Santiago Asensi, Mark Balestra, Chris Krafcik, Quirino Mancini, Bradley Vallerius, ...

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- MECN - Recommendations from MECN:** A page featuring a map of the United States with state-by-state data on online gambling regulations.
- MECN - Recommendations from MECN:** A page with a bar chart showing data for various countries or regions.
- MECN - Recommendations from MECN:** A page with a line graph showing trends over time.
- MECN - Recommendations from MECN:** A page with a bar chart and text discussing market developments.
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Companies mentioned in this report

888	Fantasy Sports Trade Association	Partouche
60 Plus Association	Financiere Lov	Partouche Interactive
888.tv	First Cagayan Special Economic Zone	PartyBingo
9Live	Folkspel	PartyGaming
ABC	Fox	PartyPoker
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AmericaTab	Gala Coral Group	PKR
AOL	GameAccount	Playtech
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Austrian Lotteries	Gaming VC	Poker Players Alliance
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Beast Gaming	German Football League	PokerStars
Bet24	Giochi24	PokerStrategy
Bet365	Gioco Digitale	Pokertube
Betable	Golden Palace	Prime Scratch Cards
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Betsson Business Solutions	Holland Casino	Sega
Bingo.com	Holtzbrinck	Serendipity
Bingos.com	Hong Kong Jockey Club	Services aux Loteries en Europe
Bodog	Igrach	Shockwave
Bonnier Gaming	Iliad	Silent Gaming
Borgata Hotel Casino & Spa	iMEGA	Sisal
BSkyB	Interactive Gaming Council	Sky
Burda Media	Intralot	Snai
Bwin	Jadestone	Société des Bains de Mer
Cagayan Special Economic Zone	Japanese Racing Association	Sportingbet
Cake Poker	La Française des Jeux	Stanleybet
California Nations Indian Gaming Association	Ladbrokes	Svenska Spel
California Tribal Business Alliance	Ladbrokes Bingo	TF1 Group
Camelot	Lex Online Entertainment	The Lotter
Cashball	Liberty Media	Tipp24
Cashcade	Lottomatica	Totale
CBC	Louis Dreyfous Group	Trade Doubler
Chariot Lottery	LSP	Trident Gaming
Chartwell	Lucien Barrière	TVG
Cheeky Bingo	LuckyMe.com	Twinspires
Christian Coalition of America	Mangas Capital Gaming	Twitter
Churchill Downs	Maria Poker	U.K. Gambling Commission
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Cogetech	Mecca Bingo	Unidad Editorial
Commerce Casino	MGM Mirage	United Games
CQR Payment Solutions	Microgame	University of Mississippi
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MECN - Media & Entertainment Consulting Network

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 lotteries. For more information see www.mecn.net.

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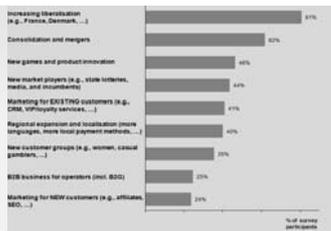
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