

Mobile Gambling Markets

Casinos, Lotteries & Betting 2010-2015

3 Country Level Forecasts - Successful Deployment Analysis - Strategic Recommendations

This report provides a thorough examination of the mobile gambling market, appraising optimal models for deploying and marketing mobile gambling services. It highlights the success of the Japan Racing Association (JRA) in developing a world-leading betting application as well as the dramatic adoption achieved by VODone's mobile lottery service in China.

To this end, this report provides country level forecasts for both China and Japan, as well as for the UK, which continues to be the market leader in mobile casino services. Key forecasts split by mobile casinos, mobile lotteries and mobile betting include:

- Number of users
- Average monthly wagers
- Total annual wagers
- Annual gross win

Key Questions Addressed by this Report:

- What is the scale of mobile gambling transactions in the key markets of China, Japan & the UK?
- How has the growth in consumer smartphone adoption impacted upon the evolution of mobile gambling services?
- What are the advantages/disadvantages of deploying browser-based apps for gambling services?
- What strategies should service providers deploy to maximise their revenue opportunity from mobile gambling?
- To what extent have traditional hurdles constraining mobile gambling growth been removed or ameliorated?

Key Benefits:

- A unique analysis of mobile gambling markets including technologies, market characteristics and forecasts.
- Practical analysis of emerging opportunities for vendors & operators.
- Unique insight: interviews of leading players with significant experience of mobile gambling markets.
- Benefit from fresh thinking, intelligent market assessment.



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Mobile Gambling Markets: Analysis & Forecasts

report overview

This highly anticipated report, now in its sixth edition, delivers a deep-rooted understanding of the mobile gambling marketplace, identifying mobile gambling user habits such as the tendency towards snacking/multitasking opposed to dedicated usage.

It includes a number of case studies examining business models, strategic partnerships, application offerings and services and considers which countries/regions offer the greatest opportunity for the deployment and adoption of mobile gambling services. In addition this strategic report also provides a number of vital recommendations for players.

analysis & forecasts

Report Analysis

6 Year Analytical Forecasts provide a detailed assay of current and future opportunities available across mobile gambling markets, focusing on key regions until 2015.

Split by 8 Key Regions North America; South America; Western Europe; Central & Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific and Africa & Middle East.

Complete Market Breakdown offers an expert appraisal of mobile gambling markets, detailing: pivotal drivers and hurdles to adoption; profiles of market-leading players; key player interviews and strategies; real-world case studies; future technologies; and recommendations for optimising revenues.

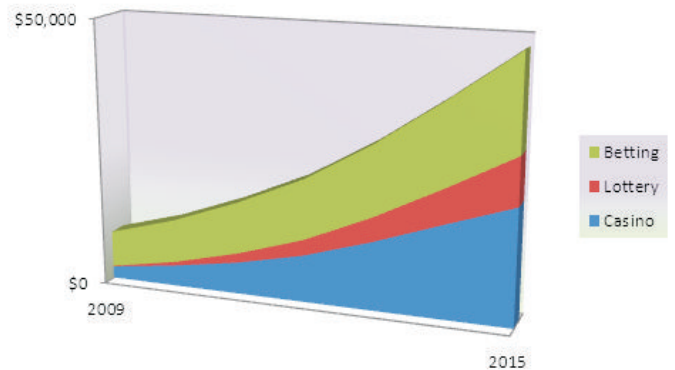
Visual Clarity with 34 tables and full colour forecast charts.

Market Forecast Suite 2010-2015

Mobile Casinos mobile users who gamble using casino type services; average monthly wager per user; total annual stakes; total gross win

Mobile Lotteries mobile users who play lottery games via their mobile; average monthly wager per user; total annual stakes; total gross win

Total Wager (\$m) on Mobile Gambling Services Split By Betting, Lottery & Casino 2009-2015



Mobile Betting mobile users who engage in betting via mobile; average monthly wager per user; total annual stakes; total gross win

Total Market total wagers on mobile gambling services; total mobile gambling gross win

our background

Juniper Research specialises in providing high quality analytical research reports & consultancy services to the telecoms industry. We have particular expertise in mobile, wireless, broadband & IP-convergence.

Juniper is independent & provides authoritative assessments of markets, technologies & industry players. Our analysts are experienced senior managers with proven track records in each of their specialist fields.

Each report is thoroughly researched, intelligently written & proof-read by qualified experts prior to publication. The report offers a rich mix of graphics, illustrations, technology roadmaps and tables.

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Executive Summary

- Types of mobile gambling; Driving mobile gambling adoption; The opportunity for mobile gambling; The market for mobile gambling services; Strategic recommendations

1. Drivers and Dynamics of Mobile Gambling

The Rise of Mobile Gambling

Mobile Gambling Drivers

- The dynamics of mobile gambling: established (convenience; privacy; ubiquity); emerging (the launch of the iPhone and App Store; Apple allows gambling apps); improved user interface; smartphones are increasingly popular; smartphones possess GPS; the rise of m-commerce/m-banking; the world cup; mobile internet adoption is increasing; deregulation of gambling services (primarily Europe)

The Demographics of Mobile Gambling

Types of Games and Services

- Casino style gambling; Lotteries; Sports betting

2. The Evolution of Mobile Gambling Services

Developed Markets: Mobile Gambling After the iPhone

- The app-based approach: aiming for the multitasking generation
- Content discovery - browser or storefront?: advantages of a browser-based approach (applications have no porting costs; apps have no memory constraints; apps/content is portable); disadvantages of a browser-based approach (services require connectivity; applications can be slow; mobile networks will be unable to cope with a browser-based model; mobile browsers are not application platforms); the rise of the hybrid - opportunities for thin clients

Emerging Markets: From Communication to Entertainment

- Case study: PhilWeb

Evolving Business Models

- Trusted banks or new entrants - B2B vs D2C: B2B (value chain, mobile gambling; case study: Spin 3); D2C case studies: Probability (company background; products and services); Betfair (company background; products and services); Collectivity (corporate background; key clients and strategic partnerships; high level view of offerings)

3. The Opportunity for Mobile Gambling

Regulation - A Brief Overview

North America

- Case study: USA (regulation; future prospects)

Latin America

- Future prospects

Western Europe

- Case study: UK (opportunities)

Rest of Western Europe

- Opportunities: Spain; France; Germany

Central & Eastern Europe

Far East & China

- Case study: China (overview; early deployments; VODone - the leading mobile lottery; future prospects)
- Case study: Japan (iPAT access via mobile; Japan horse racing 2009 total wagers; future prospects)
- Case study: South Korea

Indian Sub Continent

Rest of Asia Pacific

Africa & Middle East

4. Forecasts

Introduction

- Quantifying mobile gambling: wagers and gross win
- General prevalence: gambling commission estimate of UK mobile gambling prevalence (% adult adoption)

Mobile Casinos

- Mobile phone users who gamble

using casino type services (percentage; number)

- Mobile casino average monthly wager: average monthly stake per user
- Total mobile casino stakes: total annual stakes
- Total mobile casino gross win

Mobile Lotteries

- Mobile phone users who play lottery games via their mobile phone (percentage; number)
- Mobile lottery average (per user) monthly wager
- Total mobile lottery wagers
- Total mobile lottery gross win

Mobile Betting

- Mobile phone users who engage in betting via their mobile phone (percentage; number)
- Mobile betting average (per user) monthly wager
- Total mobile betting wagers
- Total mobile betting gross win

Total Market for Mobile Gambling Services

- Total wagers on mobile gambling services (casino, lottery and betting)
- Total mobile gambling gross win

5. Hurdles to Deployment and Adoption

Trust; Processing of Payments; The User Interface; Data Cost; Industry Structure; Network Coverage; Acceptance

- Problem gambling

Age Verification

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author profile

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Dr Holden has written extensively on mobile content, emerging telecoms markets and digital TV. He is also a regular conference speaker and a former Research Fellow of the Institute of Communication Studies, University of Leeds.

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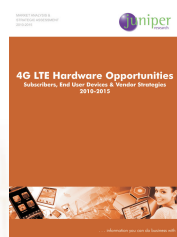
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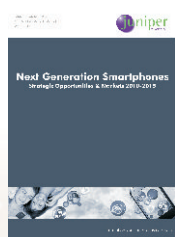
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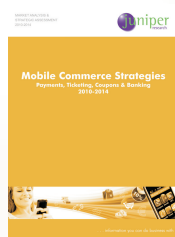
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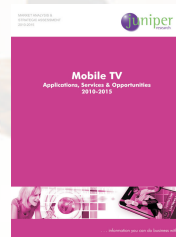
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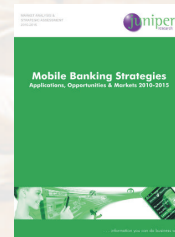
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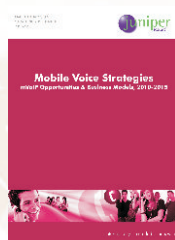
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