

Global Sports Betting Market: Analysis By Platform (Online and Land-Based), By Type (Onshore and Offshore), By Betting Type (Fixed Odds Wagering, Exchange Betting, Live/In Play Betting, eSports Betting, and Others), By Sports Type (Football, Horse Racing, Basketball, Baseball, Cricket, Hockey, and Others) By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global sports betting market was valued at US\$98.36 billion in 2023. The market value is expected to reach US\$169.37 billion by 2029. Sports betting involves predicting the outcome of sporting events and placing wagers on those predictions. It's a form of gambling where individuals, known as bettors, place bets on various sports events such as football, basketball, baseball, horse racing, and more.

As more jurisdictions legalize sports betting and regulations become more standardized, the sports betting market would expand further, unlocking new revenue streams and driving competition among operators. Moreover, ongoing technological innovations, such as blockchain and virtual reality, hold the potential to revolutionize the industry and offer novel betting experiences to consumers. Additionally, the proliferation of sports content across various digital platforms and the rise of e-sports present new avenues for growth and diversification within the sports betting market. Overall, the convergence of regulatory reforms, technological advancements, and evolving consumer preferences is poised to sustain the momentum of the sports betting industry in the years to come. The market is expected to grow at a CAGR of approx. 9% during the forecasted period of 2024-2029.

Moreover, the rapid growth of the sports betting market globally has been driven by several key government regulations and policy changes. For instance, regulators are emphasizing the need for operators to implement responsible gambling measures to protect consumers from harm. For example, many jurisdictions require operators to offer tools such as self-exclusion programs, deposit limits, and responsible gambling education initiatives. These regulations not only promote consumer protection but also enhance the credibility and sustainability of the sports betting industry. For instance, the UK has a well-established gambling market with a robust regulatory framework. The Gambling Commission oversees licensing and enforces responsible gambling measures, creating a safe and trusted environment for consumers.

Market Segmentation Analysis:

By Platform: The report provides the bifurcation of the market into two segments based on the platform: Online and Land-Based. The online segment held the highest share of the market and is expected to be the fastest-growing segment in the forecasted period. The online sports betting market has seen solid growth fuelled by the structural shift from land-based to online gambling and the increased demand for digital products and experiences in the sector. The US market has in recent years stood out in terms of growth, and has gradually started to regulate and allow online gambling licenses. Moreover, the increasing accessibility of smartphones, tablets, and computers has made it easier for individuals to engage in betting activities from virtually anywhere, at any time. This convenience factor is driving more people to opt for online betting platforms over traditional brick-and-mortar establishments.

By Type: The online sports betting platform has been further analyzed based on the following types: Onshore and Offshore. Onshore online sports betting held the highest share of the market and is expected to be the fastest-growing segment in the forthcoming years. The onshore segment of the online sports betting market is experiencing robust growth as governments recognize the economic benefits and consumer demand for online betting, they are enacting legislation to permit and oversee these activities. This legalization not only legitimizes the industry but also fosters consumer trust and confidence, leading to higher participation rates. Additionally, onshore online betting platforms are often subject to stringent regulatory requirements and consumer protection measures, which can help mitigate risks and ensure fair play.

By Betting Type: The report further provides the segmentation based on the following betting types: Fixed Odds Wagering, Exchange Betting, Live/In-Play Betting, eSports

Betting, and Others. Fixed odds wagering held the highest share of the market, whereas eSports betting is expected to be the fastest-growing segment in the forecasted period. Fixed odds wagering is expected to continue growing in the forthcoming years due to its simplicity, accessibility, and widespread popularity among bettors. Fixed odds betting provides certainty to bettors regarding potential returns, which appeals to both casual and experienced bettors alike. On the other hand, the growing popularity of eSports as a spectator sport, particularly among younger demographics, has fueled the demand for eSports betting. Additionally, advancements in technology and the widespread availability of high-speed internet connections have made it easier for fans to watch eSports tournaments and place bets online.

By Sports Type: The report provides the glimpse of the sports betting market based on the following sports type: Football, Horse Racing, Basketball, Baseball, Cricket, Hockey, and Others. Football held the highest share of the market and is expected to be the fastest-growing segment in the forecasted period. The immense popularity of football, with its large fan base and widespread coverage across various media platforms, provides ample opportunities for betting operators to capitalize on the sport's popularity. Major football leagues and tournaments, such as the English Premier League, UEFA Champions League, and FIFA World Cup, attract millions of viewers worldwide, creating a high level of interest and engagement among sports enthusiasts. Additionally, the global nature of football ensures a continuous stream of betting opportunities throughout the year, with matches taking place across different leagues and competitions.

By Region: The report provides insight into the sports betting market value based on the regions: Asia Pacific, Europe, North America, and the Rest of the World. Asia Pacific held the major share of the market. The rising disposable incomes in many Asian countries have contributed to a higher demand for recreational activities, including sports betting, as people have more expendable income to allocate towards entertainment. Additionally, the popularity of sports, particularly football, cricket, and basketball, has surged in the region, driving interest in related betting activities. While gambling is generally illegal in Mainland China, state-run lotteries like the Welfare Lottery and Sports Lottery are exceptions and are permitted by the government. Online sports betting in the country offers convenience and a plethora of options, including markets for popular games like League of Legends and Dota.

Sports betting is legal in the UK, with a rich history and a well-regulated industry that has made the UK a world leader in sports betting. The Betting and Gaming Act of 1960 legalized betting shops, which quickly became a staple of British high streets. The UK has a long tradition of sports betting, particularly on horse racing events, dating back

hundreds of years. The industry underwent a significant transformation with the digital revolution, leading to the development of online betting platforms that revolutionized the way bets are placed, making sports betting more accessible and diverse. The UK Gambling Commission, established in accordance with the Gambling Act of 2005, enforces stringent regulations to protect customers, prevent minors from gambling, and address problem gambling.

The US is regulating online sports betting on a state-by-state basis. For example, New York State introduced online sports betting in 2022, which significantly increased the US TAM (total addressable market) in its first year of going live. To a large extent driven by the potential tax dollars from regulated gambling, more US states and Canadian provinces are expected to regulate in the near term, further expanding the market. Moreover, as the market matures, operators will be able to optimize their offerings and attract more consumers.

Market Dynamics:

Growth Drivers: The global sports betting market has been growing over the past few years, due to factors such as rising purchasing power, increasing number of internet users, growing online gambling market, increasing casino visitation, growing popularity of sports events, integration of sports betting with media and entertainment, favorable government regulations, and many other factors. The rapid growth of the sports betting market globally has been driven by several key government regulations and policy changes. For instance, many countries have moved to legalize and regulate sports betting, creating new opportunities for market growth. For example, the US has seen a significant expansion of the sports betting market following the Supreme Court's decision to overturn the Professional and Amateur Sports Protection Act (PASPA) in 2018, allowing individual states to legalize sports betting. Since then, 36 states have legalized sports betting, with 30 states offering live betting as of 2023. This has led to a significant increase in the popularity of sports betting in the US. Moreover, countries such as Canada, Germany, the Netherlands, Australia, and Ireland have also seen changes in their regulatory landscape, with more markets opening up to licensed operators. This global expansion has led to increased competition among operators, driving innovation and growth in the industry.

Challenges: However, the market growth would be negatively impacted by various challenges such as increasing gaming tax revenues, data integrity & security, match-fixing and integrity concerns, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing popularity of e-sports, increasing 5G adoption, insourcing of sportsbook technology, consolidation in the online gambling market, growing impact of technologies (AI & ML, AR/VR, and blockchain), increasing engagement through social betting platforms, multicurrency factor, etc. The increasing revenue and audience of esports have a significant impact on the growth of the sports betting market by expanding the potential betting audience and diversifying the available betting opportunities. As esports continues to gain popularity and mainstream acceptance, they attract a growing number of fans who are interested in engaging with the competitive gaming scene. This burgeoning audience represents a new demographic of potential bettors for sports betting operators, particularly those offering esports betting markets.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic presented significant challenges for the global sports betting market, particularly for land-based operators reliant on traditional betting formats. However, it also accelerated the digital transformation of the industry, driving innovation and adaptation in the online sector. As sporting events gradually resumed and restrictions eased, the sports betting market began to recover, albeit with lasting impacts on consumer behavior and industry dynamics. As live sports events resumed and consumer confidence returned, the sports betting market demonstrated resilience and agility, paving the way for sustainable growth and evolution in the years to come.

Competitive Landscape:

The global sports betting industry is highly competitive landscape characterized by a mix of established players, emerging startups, and technological innovations. The key players in the global sports betting market are:

International Game Technology Plc. (IGT)

Super Group Limited (Betway)

Kindred Group Plc

Flutter Entertainment Plc.

888 Holdings (888sport)

Entain Plc.

Churchill Downs Incorporated

Sun International (SunBet)

Rivalry Corp.

Draftkings Inc.
ComeOn Group
Fortuna Entertainment Group A.S.

These industry giants continuously engage in mergers, acquisitions, and strategic partnerships to expand their market presence and diversify their offerings. Additionally, the industry has witnessed the rise of digital platforms and mobile betting apps, intensifying competition further. Regulatory changes and the legalization of sports betting in various jurisdictions worldwide also shape the competitive landscape, influencing market entry strategies and investment decisions for both established firms and new entrants.

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