

Italian Gaming Market: Analysis By Type (Retail Gaming, Lotteries, Casino & Bingo, Online, and Retail Sports), By Online Type (iGaming, iSports, and Others) Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The Italian gaming market in 2022 was valued at US\$22.98 billion. The market value is expected to reach US\$31.46 billion by 2028. Gaming refers to the act of participating in various games of chance, where players place bets or wagers on uncertain outcomes with the hope of winning additional money or prizes. This form of gaming is commonly associated with casinos, betting shops, online gambling platforms, and other gambling establishments. The Italian gaming market appears to be benefitting from strong underlying growth within the online segment. Moreover, introduction of new gaming verticals and innovation would further drive the market growth.

Italy has a mature gaming market as compared to its other counterparts. In terms of gaming regulation, Italy has been one of the most active countries in Europe. The Italian model amounts to a concession-based environment and one that is open to national and foreign operators through public tender procedures. On the other hand, the regulator, the Italian Customs and Monopolies Agency (ADM), is the guarantor of the industry's legality and security, and its efforts have made Italy a virtuous example in the fight against illegal and irregular gaming operators. Therefore, owing to the favorable regulations, the Italian gaming market has been experiencing growth in the past few years. The market is expected to grow at a CAGR of approx. 5% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into four types: Retail Gaming, Lotteries, Casino & Bingo, Online, and Retail Sports. The retail gaming segment held the highest share of the market, whereas online gaming is expected to be the fastest-growing segment in the forecasted period. The performance of the retail gaming market in Italy would be influenced by tourism and travel trends. The presence of international tourists and visitors is expected to drive foot traffic to brick-and-mortar casinos and gaming establishments in the forthcoming years. On the other hand, online platforms can offer a wide variety of gaming options, including casino games, sports betting, eSports, virtual reality gaming, and more. This diversity can cater to different interests and preferences, attracting a broader spectrum of players.

By Online Type: The Italian online gaming market can be divided into three segments based on the type: iGaming, iSports, and Other. iGaming held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. iGaming allows players to participate in gaming activities from the comfort of their homes or on-the-go through computers, smartphones, tablets, and other internet-enabled devices. The advancement of internet technologies, increased internet penetration, and the proliferation of smartphones have made online gaming more accessible to a wider audience. On the other hand, esports has seen tremendous growth in recent years, with large-scale tournaments, professional leagues, and a dedicated fan base. The popularity of esports has contributed to the overall growth of the iSports market.

Market Dynamics:

Growth Drivers: The Italy gaming market growth is predicted to be supported by numerous growth drivers such as acceleration in online penetration rate, high propensity to spend on gaming, increasing smartphones penetration rate, increasing gaming tax income, and supportive government reforms, fully exposed to multi-concession gaming verticals, favorable regulatory measures, and many other factors. Taxation and revenue sharing policies can play a significant role in supporting the growth of the Italian gaming market. Revenue sharing policies can facilitate investments in essential infrastructure related to the gaming industry. This includes modernization of gaming facilities, technological upgrades, and the development of online platforms. Improved infrastructure can enhance the overall gaming experience, attract more customers, and foster market growth.

Challenges: However, the market growth would be negatively impacted by various challenges such as competition from unlicensed operators, economic and socio-political

factors, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing virtual reality (VR) and augmented reality (AR) gaming, increasing popularity of esports, personalization and gamification, integration of cryptocurrency in gaming, etc. Esports has a strong appeal to the younger demographic, including millennials and Gen Z. By embracing esports and providing platforms for competitive gaming, operators can attract and retain younger players who may not be as interested in traditional forms of gambling. Also, esports events and tournaments attract a significant number of viewers both online and in-person. This popularity has made esports an attractive platform for sponsorship and advertising.

Impact Analysis of COVID-19 and Way Forward:

The Italian gaming market experienced negative growth during the pandemic. To control the spread of the virus, Italy implemented strict lockdown measures, leading to the temporary closure of land-based gaming establishments, including casinos, betting shops, and gaming halls. This closure resulted in a significant loss of revenue for the industry. On the other hand, with the closure of physical gaming venues, there was a noticeable surge in online gaming activity. However, the pandemic spurred interest in virtual reality (VR) and augmented reality (AR) gaming experiences. Post-COVID-19, these technologies may gain further traction as gaming companies explore immersive and interactive gaming options.

Competitive Landscape:

The Italian gaming market is competitive in nature, implying ongoing market share risk from existing competition as well as potential new entrants. Competition may also intensify due to further sector consolidation. The key players in the Italian gaming market are:

Lottomatica Group

Playtech Plc (Snaitech)

International Game Technology Plc. (IGT)

Betsson AB (StarCasino)

Super Group Limited (Betway)

Novomatic AG

Kindred Group Plc

Flutter Entertainment Plc (Sisal)

888 Holdings (888sport)

Entain Plc.

SKS365 Group (Planetwin365)

Some of the strategies among key players in the market are mergers, acquisitions, and collaborations. For instance, in 2022, Lottomatica Group acquired Betflag. Whereas, in 2021, Flutter Entertainment acquired Sisal. Entain has been investing heavily in marketing and advertising in Italy. The company has partnered with several high-profile Italian sports teams, including Inter Milan. This has helped to raise awareness of Entain's brands in Italy, and it has also helped to drive growth in the company's sports betting and gaming businesses. Lottomatica is the national leader in Italy's retail gaming segment. Lottomatica is constantly introducing new games and formats to the company's retail gaming portfolio. This helps to keep the games fresh and exciting for players, and it also helps to attract new players to the market. Also, Lottomatica manages gaming halls throughout Italy with distinctive and recognizable brands. This allows Lottomatica to offer a physical presence in addition to the company's online offerings, potentially attracting a wider range of customers.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Gaming: An Overview

2.1.1 Introduction To Gaming

2.1.2 Structure of Gaming

2.2 Gaming Segmentation: An Overview

2.2.1 Gaming Segmentation

3. ITALY MARKET ANALYSIS

3.1 Italy Gaming Market: An Analysis

3.1.1 Italy Gaming Market: An Overview

3.1.2 Italy Gaming Market by Value

3.1.3 Italy Gaming Market by Type (Retail Gaming, Lotteries, Casino & Bingo, Online, and Retail Sports)

3.1.4 Italy Gaming Market by Game Type (AWP, VLT& SWP, Lottery games, Lotto, Sports betting, Card games & fixed odd games, National lottery games, Bingo, Virtual betting, Tournament, Horse racing betting, Poker cash, and Betting exchange)

3.2 Italy Gaming Market: Type Analysis

3.2.1 Italy Gaming Market by Type: An Overview

3.2.2 Italy Retail Gaming Market by Value

3.2.3 Italy Lotteries, Casino & Bingo Gaming Market by Value

3.2.4 Italy Online Gaming Market by Value

3.2.5 Italy Online Gaming Market by Type (iGaming, iSports, and Other)

3.2.6 Italy Online Gaming Market by Game Type (Online Casino Games, Online Poker Tournament, and Online Poker (cash mode))

3.2.7 Italy Retail Sports Gaming Market by Value

3.3 Italy Online Gaming Market: Type Analysis

3.3.1 Italy Online Gaming Market by Type: An Overview

3.3.2 Italy iGaming Gaming Market by Value

3.3.3 Italy iSports Gaming Market by Value

3.3.4 Italy Other Online Gaming Market by Value

4. IMPACT OF COVID-19

- 4.1 Impact of COVID-19 on Italy Gaming Market
- 4.2 Impact of COVID-19 on Amount Wagered in Gaming Market
- 4.3 Post COVID-19 Impact on Italy Gaming Market

5. MARKET DYNAMICS

5.1 Growth Drivers

- 5.1.1 Acceleration in Online Penetration Rate
- 5.1.2 High Propensity to Spend on Gaming
- 5.1.3 Increasing Smartphones Penetration Rate
- 5.1.4 Increasing Gaming Tax Income and Supportive Government Reforms
- 5.1.5 Fully Exposed to Multi-Concession Gaming Verticals
- 5.1.6 Favorable Regulatory Measures

5.2 Challenges

- 5.2.1 Competition from Unlicensed Operators
- 5.2.2 Economic and Socio-Political Factors

5.3 Market Trends

- 5.3.1 Growing Virtual Reality (VR) and Augmented Reality (AR) Gaming
- 5.3.2 Increasing Popularity of Esports
- 5.3.3 Personalization and Gamification
- 5.3.4 Integration of Cryptocurrency in Gaming

6. COMPETITIVE LANDSCAPE

- 6.1 Italy Retail Sports Gaming Players by Market Share
- 6.2 Italy Retail Gaming Players by Market Share
- 6.3 Italy iSports Gaming Players by Market Share
- 6.4 Italy iGaming Players by Market Share
- 6.5 Italy Gaming Market Players' Sales by Gaming Vertical
- 6.6 Italy Gaming Market Players by Acquisitions

7. COMPANY PROFILES

7.1 Lottomatica Group

- 7.1.1 Business Overview
- 7.1.2 Operating Segments
- 7.1.3 Business Strategies

7.2 Playtech Plc (Snaitech)

- 7.2.1 Business Overview
- 7.2.2 Operating Segments
- 7.2.3 Business Strategies
- 7.3 International Game Technology Plc. (IGT)
 - 7.3.1 Business Overview
 - 7.3.2 Operating Segments
 - 7.3.3 Business Strategies
- 7.4 Betsson AB (StarCasino)
 - 7.4.1 Business Overview
 - 7.4.2 Revenue by Products
 - 7.4.3 Business Strategies
- 7.5 Super Group Limited (Betway)
 - 7.5.1 Business Overview
 - 7.5.2 Operating Segments
 - 7.5.3 Business Strategies
- 7.6 Novomatic AG
 - 7.6.1 Business Overview
 - 7.6.2 Operating Segments
 - 7.6.3 Business Strategies
- 7.7 Kindred Group Plc
 - 7.7.1 Business Overview
 - 7.7.2 Operating Segments
 - 7.7.3 Business Strategies
- 7.8 Flutter Entertainment Plc (Sisal)
 - 7.8.1 Business Overview
 - 7.8.2 Operating Segments
 - 7.8.3 Business Strategies
- 7.9 888 Holdings (888sport)
 - 7.9.1 Business Overview
 - 7.9.2 Operating Segments
 - 7.9.3 Business Strategies
- 7.10 Entain Plc.
 - 7.10.1 Business Overview
 - 7.10.2 Operating Segments
 - 7.10.3 Business Strategies
- 7.11 SKS365 Group (Planetwin365)
 - 7.11.1 Business Overview
 - 7.11.2 Business Strategies

List Of Figures

LIST OF FIGURES

Figure 1: Structure of Gaming

Figure 2: Gaming Segmentation by Type

Figure 3: Gaming Segmentation by Game Type

Figure 4: Italy Gaming Market by Value; 2018-2022 (US\$ Billion)

Figure 5: Italy Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 6: Italy Gaming Market by Type; 2022 (Percentage, %)

Figure 7: Italy Gaming Market by Game Type; 2022 (Percentage, %)

Figure 8: Italy Retail Gaming Market by Value; 2018-2022 (US\$ Billion)

Figure 9: Italy Retail Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 10: Italy Lotteries, Casino & Bingo Gaming Market by Value; 2018-2022 (US\$ Billion)

Figure 11: Italy Lotteries, Casino & Bingo Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 12: Italy Online Gaming Market by Value; 2018-2022 (US\$ Million)

Figure 13: Italy Online Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 14: Italy Online Gaming Market by Type; 2022 (Percentage, %)

Figure 15: Italy Online Gaming Market by Game Type; 2022 (Percentage, %)

Figure 16: Italy Retail Sports Gaming Market by Value; 2018-2022 (US\$ Billion)

Figure 17: Italy Retail Sports Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 18: Italy iGaming Gaming Market by Value; 2018-2022 (US\$ Billion)

Figure 19: Italy iGaming Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 20: Italy iSports Gaming Market by Value; 2018-2022 (US\$ Billion)

Figure 21: Italy iSports Gaming Market by Value; 2023-2028 (US\$ Billion)

Figure 22: Italy Other Online Gaming Market by Value; 2018-2022 (US\$ Million)

Figure 23: Italy Other Online Gaming Market by Value; 2023-2028 (US\$ Million)

Figure 24: Italy's Total Amount Wagered in Gaming Market; 2015-2021 (US\$ Billion)

Figure 25: Italy's Online Gaming Penetration Rate; 2023-2028 (Percentage, %)

Figure 26: Europe's Online Gaming Penetration Rate; 2022 (Percentage, %)

Figure 27: Europe GGR Spend Per Capita and Consumer Spending on Leisure; 2022 (US\$, Percentage, %)

Figure 28: Italy Smartphone User Penetration Rate; 2017-2025 (Percentage, %)

Figure 29: Italy's Tax Revenue from Gaming Activities; 2015-2021 (US\$ Billion)

Figure 30: Italy AR and VR B2C Market Revenue; 2020-2027 (US\$ Billion)

Figure 31: Italy Retail Sports Gaming Players by Market Share; 2022 (Percentage, %)

Figure 32: Italy Retail Gaming Players by Market Share; 2022 (Percentage, %)

Figure 33: Italy iSports Gaming Players by Market Share; 2022 (Percentage, %)

Figure 34: Italy iGaming Players by Market Share; 2022 (Percentage, %)

Figure 35: Italy Gaming Market Players' Sales by Gaming Vertical; 2022 (Percentage, %)

Figure 36: Lottomatica Group Revenues by Segment; 2022 (Percentage, %)

Figure 37: Playtech Plc Revenue by Segment; 2022 (Percentage, %)

Figure 38: International Game Technology Plc. (IGT) Revenue by Segments; 2022 (Percentage, %)

Figure 39: Betsson AB Revenue by Product; 2022 (Percentage, %)

Figure 40: Super Group Limited Revenue by Segment; 2022 (Percentage, %)

Figure 41: Novomatic AG Revenues by Segment; 2022 (Percentage, %)

Figure 42: Kindred Group Plc Revenue by Segment; 2022 (Percentage, %)

Figure 43: Flutter Entertainment plc. Revenue by Segments; 2022 (Percentage, %)

Figure 44: 888 Holdings Revenue by Segments; 2022 (Percentage, %)

Figure 45: Entain Plc. Revenue by Segments; 2022 (Percentage, %)

Table 1: Concession Structure of the European Gaming Market

Table 2: Italy Gaming Market Players by Acquisitions

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