

UK Online Gambling Intelligence Report, Jan – Dec 2012

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Abstracts

What will you get from this report?

A who's who in online gambling.

In-depth market analysis covering January 2012 to December 2012.

Over 100 individual pieces of key insights.

Over 100 individual pieces of statistical interpretation.

Analysis of the top 100 brands across the top 50 keywords.

An interpretation of the top brands search and social media strategies.

What questions do we answer?

Who are the market leaders?

Which keywords are driving market visibility?

What are brands doing to achieve maximum market share?

How are brands using social media to acquire customers?



Top Insights

Since 2007, online gambling advertising has increased by 1,386%. This is indicative of the continuing competitiveness within the gambling sector.

Sports betting dominates online gambling, accounting for 45% of all search impression volume.

During 2012, search impression volume from mobile devices grew 75%, with the sports betting sub-vertical having the largest share.

In terms of both revenue and search impression volume, horse racing betting is the largest segment within sportsbook and is led by William Hill.

Casino and poker is led by 888. This has been achieved with the implementation of an aggressive strategy across both organic and paid search. However, they face strong competition from cross-vertical brands like Ladbrokes, as well as pure play specialists such as PokersStars.

Intercasino has seen a dramatic downturn in their organic performance and there is evidence to suggest that this may be partly due to the historical impact of a Google algorithm update.

Gala and Mecca are the only traditional land-based bingo operators within the top 10 of our aggregated click share index. Gala's position is attributed to the fact that they have solid organic coverage, while Mecca leverage PPC to maximise their exposure.

888 has always invested heavily in traditional organic and paid search. However, a recent agreement with Facebook to offer real money gambling is an aggressive move by 888 as they look to capitalise on the growth of social media.

Paddy Power have developed a seamless integration between their TV advertising and social media platforms by deploying a content strategy that communicates with great effect a maverick brand proposition that is entertaining, fun and humourous.



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