



The State of the Online Poker Industry

Spring 2019



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Abstract

The online poker industry enjoyed a second consecutive year of stability in 2018. The four regulated online poker providers operated by publicly traded companies, which comprise of The Stars Group, 888, GVC and Unibet, grew combined net gaming revenue by 2.2% for the year. Indicators from private operators show even stronger revenue growth, and the large online poker networks are also either static or growing.

But this stability has not come easily. The industry has gone through an intense period of development, with every aspect of the online poker experience and marketing strategies rethought, reworked and redesigned. Those who took their foot off the gas in 2018 paid the price, with poker players quick to move to the operator with the better offer, the better software, or the better branding.

Poker Industry PRO is excited to release our most extensive report to date analyzing each of these themes in detail and providing the reader with a comprehensive understanding of the major trends, key developments, and important industry indicators in 2019.

In [Industry Trends](#), the major themes of the last six months are identified and discussed at a high level, including the proliferation of online poker tournament series, intense product development, and the increased scrutiny on third party tools.

[Market Developments](#) covers the major regulatory advancements in the online gambling industry, with a focus to the impact on online poker and its operators. Over a dozen countries are discussed, covering Europe, the United States, Latin America and Asia.

The report concludes with [Operator Focus](#), where a spotlight is cast over each of the industry's major online poker operators. Both public and

private companies, their performance and key developments in 2018, and their outlook into 2019 are discussed.

Also, for the very first time, three exclusive features can be found throughout this report with each taking a deep dive into a key industry development that will shape the year.

In [Twitch: 2019's Acquisition Battleground](#), the landscape of online poker live-streaming is explored with comments from some of the market's key players, including leading Twitch poker streamer Jason Somerville, TSG's Head of Poker Marketing Eric Hollreiser, partypoker's Community and Twitch Specialist Colette Stewart, and former Head of Poker at Twitch Scott Ball.

[European Shared Liquidity: Online Poker's New Frontline](#) looks at the recent past present and future of the exciting new online poker market growing in southern Europe following the adoption of cross-border liquidity sharing. Comments from key operators and industry bodies help build a snapshot of the market today and the opportunities that still lie ahead.

PRO also had the opportunity to interview [Martin Stalros, COO of Relax Gaming](#), who helps to paint a picture of the ever-changing landscape of the online poker product, from six years ago before the company launched its own online poker platform, to where the industry is today and what could be the path forward.



The Homepage to the Poker Industry

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Our professional staff has been providing expert insight to industry analysts, investors, journalists and operators since 2011.

Along with corporate subscriptions to our data, analytics and news platform, we also offer a bespoke reporting service.

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Cash game data and cash game traffic figures referenced in the report come from Poker Industry PRO's Cash Game Trends sections of the platform, part of Poker Industry PRO's suite of industry analysis tools available to subscribers. Data is provided by independent industry monitor [GameIntel](#) under an exclusive partnership. Figures are based on the average number of concurrent seats filled at cash game tables each day.

Unless stated otherwise, any figures quoted from online gaming companies come from the dissemination of public financial statements and/or public comments. Much of this information is made available on Poker Industry PRO's Data section of the platform. Jurisdictional data comes from publications released by regulatory authorities in those jurisdictions.

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