

# Core iGaming Trends and Challenges in 2024

based on in-person  
surveys of over 350  
iGaming professionals





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## Expert's opinion

We believe every report and research into the trends and challenges of the online gambling industry is worth the effort. Next to OGQ's own research, the EvenBet report became one of the key anchor points for our work.

Martin Oelbermann,  
Director of Online Gambling Quarterly



# Methodology : Who, Where, When

## 1. Exhibitions & Events

ICE  
HOT100 Vietnam  
SiGMA Asia  
iGB Live  
SBC Summit Lisbon  
SiGMA Europe

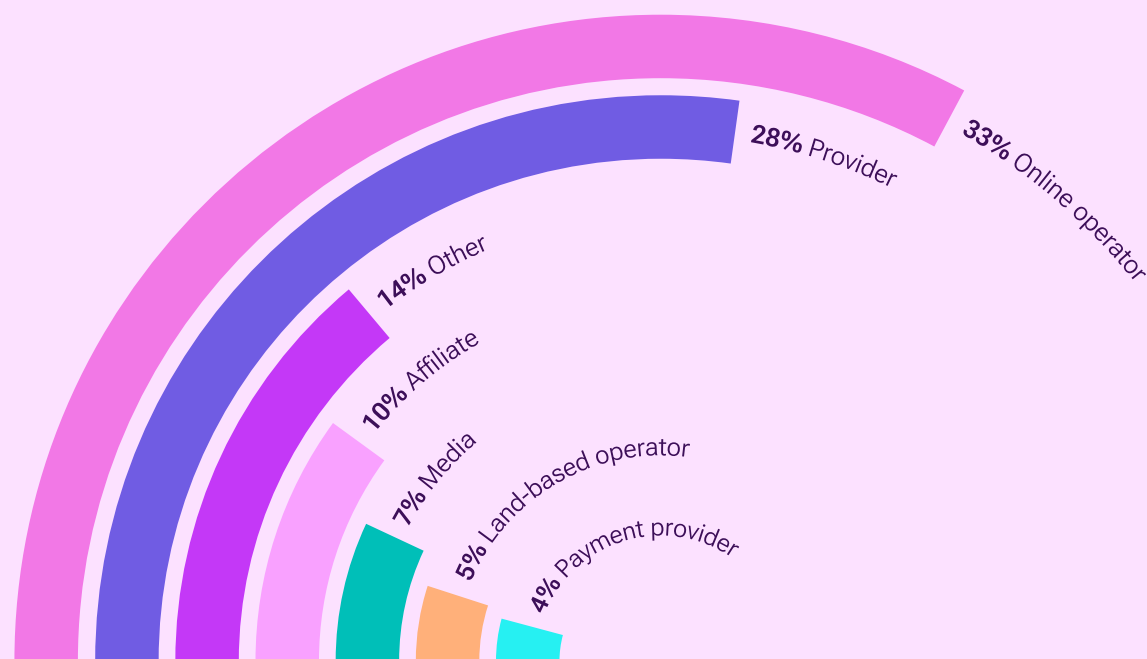
## 2. Research period

1<sup>st</sup> January — 14<sup>th</sup> November 2024

## 3. Verticals participated

We had an excellent opportunity to include a significant number of operators in our survey: 33% were online operators, and 5% were land-based operators. A substantial percentage of the respondents, 27%, were software suppliers. Affiliates comprised 10% of respondents, media 7%, and payment solution providers 4%. The diverse group labeled “Others” (14%) included consultants from various fields, regulators, service providers, aggregators, AI solution providers, and more.

Verticals participated



## 4. Instruments

To conduct this research, we used a questionnaire consisting of multiple-choice questions with an option to provide an additional free-form answer. All the **353 respondents** took EvenBet’s survey **in person** which allowed us to choose the most relevant audience, possessing vast expertise in the iGaming industry and representing mostly the decision makers. The questionnaire included a detailed respondent profiling to provide deep insights on the differences between companies from various verticals and markets and experts with specific professional expertise (C-level, marketing, etc.).

**EVENBET GAMING** Poker & Card Games Provider

### iGaming Industry Research 2024 by EvenBet Gaming

This is a research that will help us outline industry trends and challenges. All the answers are anonymous. No private data is collected. Thank you for your answers!

**What are the biggest challenges of your company this year? Please name three.**  
(1) Please choose three options

- ☐ Responsible gaming issues
- ☐ Regulation and compliance
- ☐ Recruiting
- ☐ Competition
- ☐ Organisational issues due to growth
- ☐ Fraud
- ☐ Innovation adoption
- ☐ Adaptation to the new markets
- ☐ Other:

**What is the main goal (focus) for your company in 2024?**

- ☐ Expansion in size
- ☐ Expansion to the emerging markets
- ☐ Acquisition growth domestically
- ☐ Marketing activity boost, new marketing strategies
- ☐ Technological advancement
- ☐ Customer service improvement
- ☐ Other:

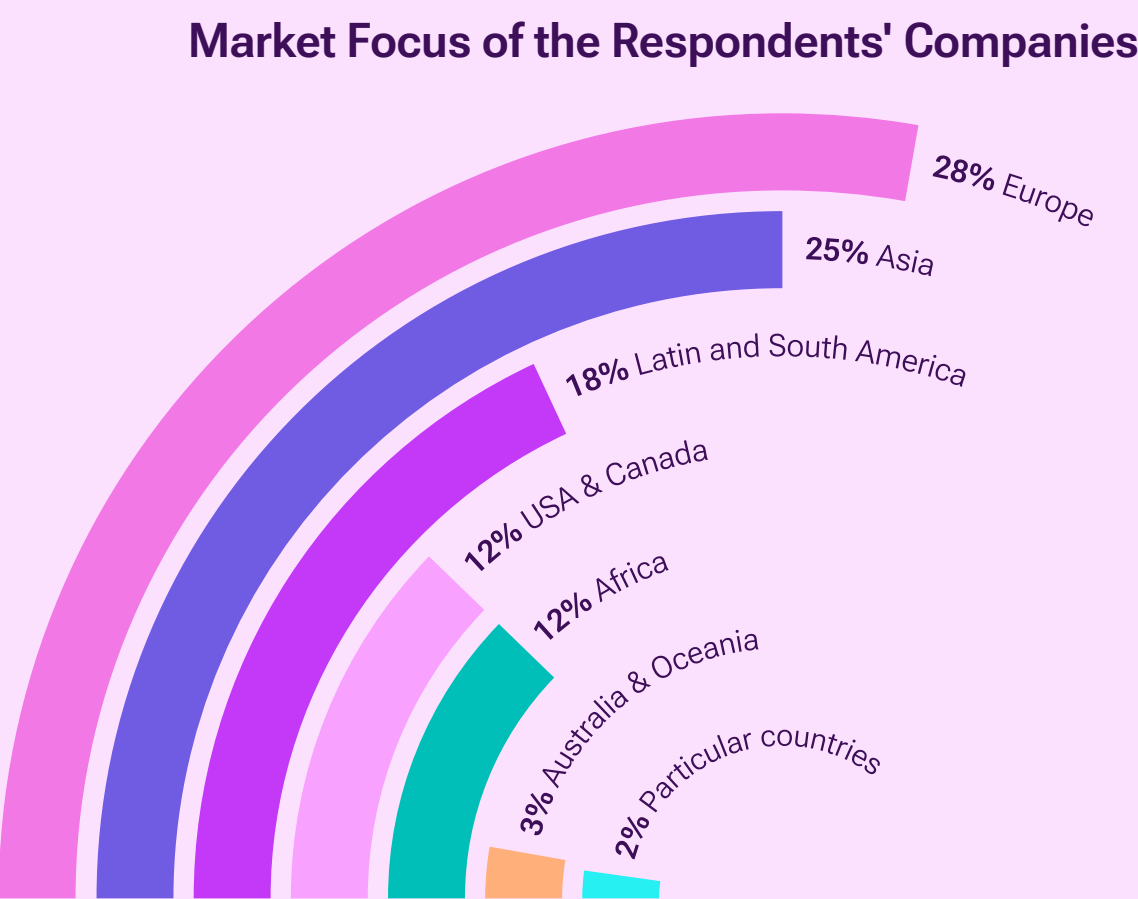
**Please name 3 innovations your company implemented within the last year**  
(1) Please choose three options

- ☐ New game (new mechanics)
- ☐ New game (new design)
- ☐ AI or Machine Learning implementation
- ☐ Personalised customer experience
- ☐ VR or Metaverse
- ☐ Live or In-play betting
- ☐ Blockchain technologies
- ☐ Other:

# Methodology : Who, Where, When

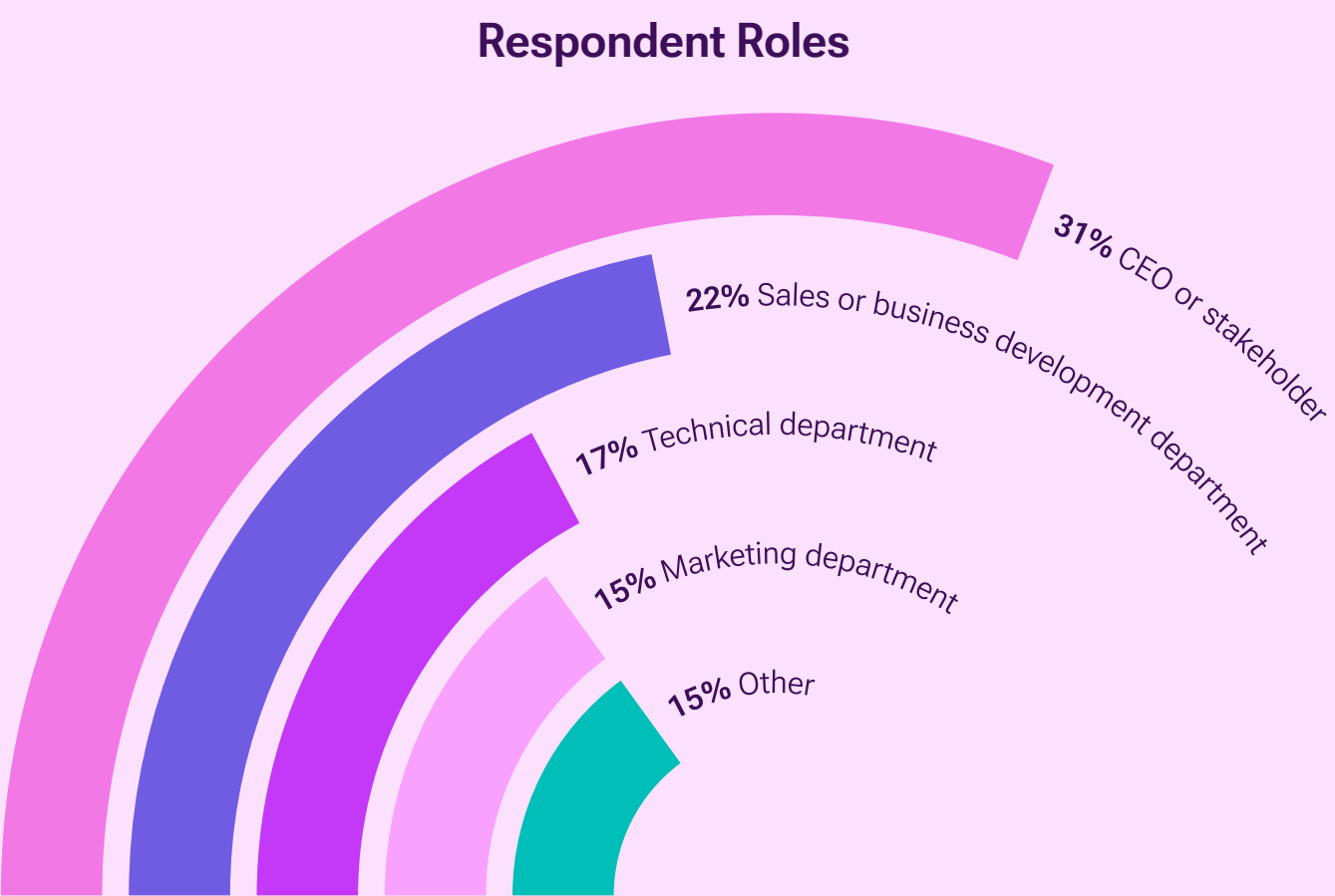
## 5. Companies' market focus

The market focus of the companies inquired has shifted dramatically in 2024. Last year, Europe held a dominant lead by a significant margin (11%), followed closely by the Latin American market. However, this year, Asia has emerged as a strong contender, capturing 25% of the votes compared to Europe's 28%. Latin and South America holds the third position, with 18% of the votes. Notably, Brazil was not identified as a separate attractive market, but rather, the broader Latin American region was favoured. The USA and Canada region, as well as Africa, received 12% of the votes each, while Australia and Oceania were indicated by only 3% of respondents.



## 6. Respondents' professional sector

CEOs made up the largest share at 31% of the respondents, followed closely by sales representatives at 22%. Surprisingly, technical specialists took third place with 17%, which may be evidence of meaningful technical shifts happening in the industry and that the technical department wants to learn what the competitors do straight from the source. The marketers trailed behind by 2% and ended up at the bottom of the list along with the "Other" group. This year, the group labeled as "Others" was quite diverse, including HR specialists, lawyers, regulators, strategy managers, editors, and more.



# Imprint

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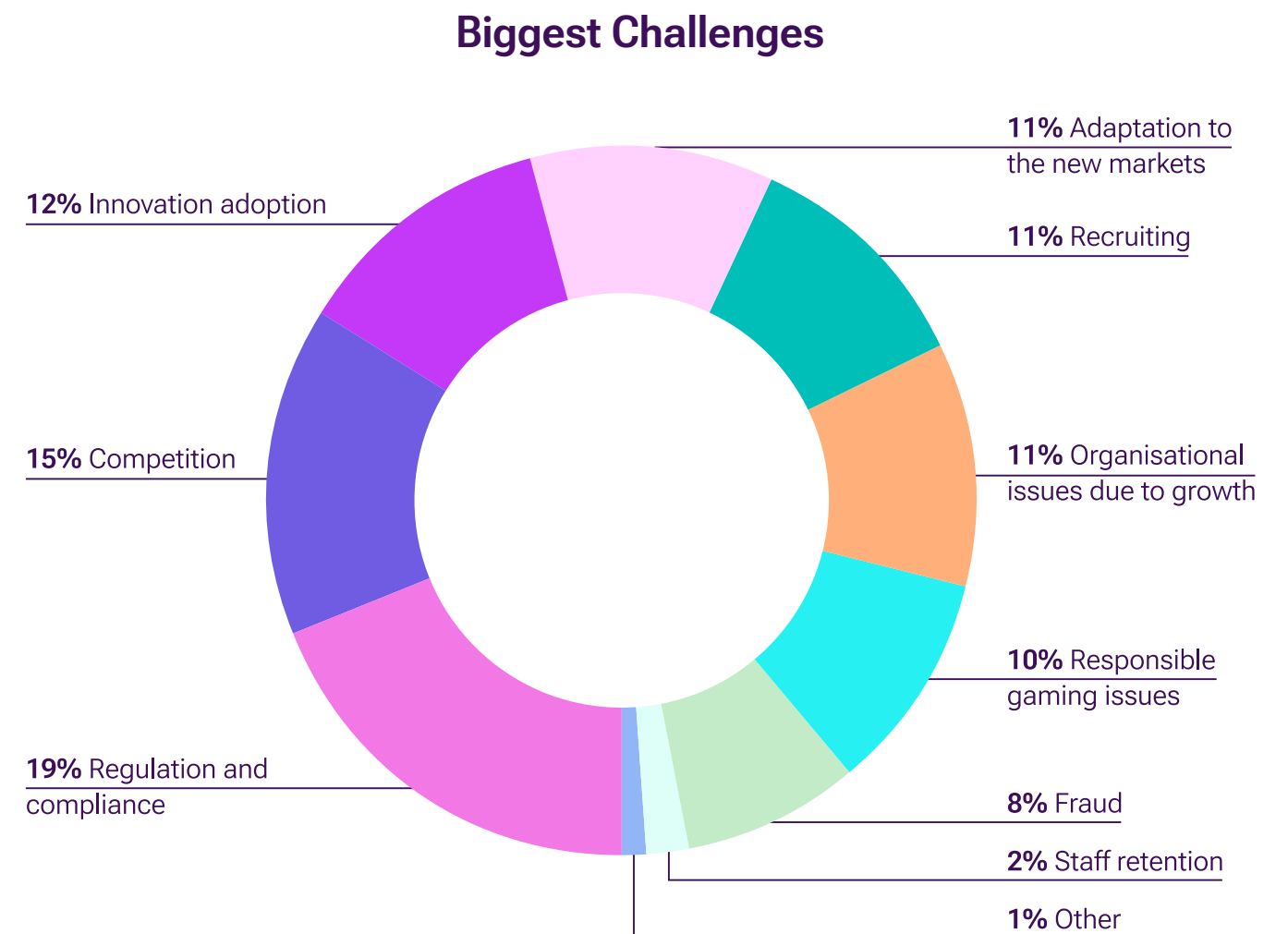
# Most Pressing Issues for the Respondents



# Most Pressing Issues for the Respondents

1 Industry representatives unsurprisingly ranked **Regulation and compliance** as the most pressing issue, with 19% of respondents citing it. The dispersed nature of regulations across different countries, which demands substantial financial, human, and time resources from operators and providers, continues to be the most challenging and crucial concern.

In our 2023 survey, regulatory issues also took the first position in challenges with an even more drastic result of 29%.



# Main Regulation & Compliance Changes in 2024



## United Kingdom

The UK introduced stricter regulations for the iGaming industry in 2024.

In January the UK Parliament proposed financial checks for players, and the UK Gambling Commission (UKGC) was empowered to block illegal gambling sites to combat unlicensed operators and online crime. In addition to that, gambling operators will have to submit tax declarations on a quarterly basis to the UKGC.

Operators will be obliged to conduct player surveys, set deposit limits, report activities, and maintain communication with vulnerable players. They must also assess risks for players depositing over £5,000 monthly, and request financial documents and conduct Enhanced Due Diligence (EDD) for those depositing over £25,000 annually.

This autumn the regulator introduced new restrictions on online casino slot betting limits, capping spins at £5 for players over 25 years old and £2 for those under 25.

It is highly likely that online gambling taxes will be doubled in the near future.



## UAE

The UAE has introduced regulations for the gambling industry through the General Commercial Gaming Regulatory Authority (GCGRA). Operators, as well as senior executives in gaming establishments, are required to apply for a license. The application process allows operators to choose from all 7 emirates, suggesting that any of them may become eligible for commercial gambling activities.

The GCGRA's website became operational following the issuance of its first license to "The Game," an operator authorized to conduct lottery activities in the UAE. This marks a significant step toward establishing regulated gambling in the country, with casinos expected to begin operations soon.

In December 2024, the UAE's General Commercial Gaming Regulatory Authority (GCGRA) issued warnings to residents about engaging with unlicensed lottery and gaming operators. The GCGRA emphasized the risks associated with unlicensed gambling, including fraud and potential legal consequences, reinforcing the country's strict stance against unauthorized gaming activities.



## USA

The landscape of iGaming regulation in the USA is rapidly evolving. Key developments include the country's plans to launch its first National Self-Exclusion Program, a major step toward responsible gaming. Additionally, several states are considering higher taxes on online betting. For example, Illinois has introduced a progressive tax rate for online bookmakers, ranging from 20% to 40%, up from the previous 15%.

At the federal level, Congress is reviewing a bill to regulate betting nationwide. Key proposals include:

- States must apply to the Department of Justice to open regulated betting markets.
- A ban on advertising bets from 8 a.m. to 10 p.m., microbets and using credit cards for gaming account deposits.
- Restrictions on celebrity endorsements of betting operators.
- Prohibition of AI for tracking players' gaming habits.
- Limits on daily deposits (max. 5 per day).



## Thailand

In 2024, Thailand has made significant steps toward regulating the gaming and casino industry, aiming to legalise casinos and prevent monetary "leakage" from illegal gambling. In August the government proposed a draft bill that outlines a 17% tax on gross gaming revenue and requires operators to include additional entertainment facilities, such as amusement parks and restaurants. Licenses would be issued for 30 years with an option for extension, and entry fees for Thai nationals are modeled after Singapore's casino regulations. The legalisation efforts aim to capture revenue lost to casinos in neighboring countries like Cambodia and Vietnam while stimulating the local economy.



## Philippines

The Philippine government has shut down the largest offshore gaming facility, POGO, in Kawit, Cavite. It had 57 buildings and employed 30,000 workers. This closure is part of the plan to end all offshore gaming operations by December 31, 2024, under Executive Order 74 signed by President.



# Main Regulation & Compliance Changes in 2024



## Brazil

Brazil is actively promoting online gambling regulation this year, taking steps to streamline the market and protect players. The government has introduced strict rules, including the mandatory use of the “.bet” domain for legal operators and the localisation of servers, which simplifies monitoring and suppresses the activities of illegal platforms. Furthermore, Brazil has banned the use of credit cards and cryptocurrencies, free bets, and also introduced a [15% tax](#) on winnings over \$550 USD.

Additionally, transparency requirements have been strengthened: platforms are required to provide information about odds and random number generators. As of October 1, operators who have [not applied](#) for a Brazilian license are considered to be operating illegally.

Starting from January 1, 2025, the legal online betting market is set to begin operating, which will strengthen government control over this industry. [Legislation regarding land-based casinos](#) remains under consideration.

[New regulations targeting online financial transactions](#) will challenge online poker platforms using Pix instant payments system in 2025–2026. Key requirements include capital thresholds, auditing standards, and adherence to financial protocols. While these measures aim to enhance security and transparency for players, they may pressure smaller operators and drive market consolidation.



## Curaçao

In [December 2024](#), Curaçao's parliament passed the National Ordinance on Games of Chance (LOK), marking a significant overhaul of its gambling regulations. This legislation aims to replace the existing Gaming Control Board (GCB) with the Curaçao Gaming Authority (CGA), which will directly oversee licensing and enforce stricter compliance requirements. The reform aims to enhance accountability, combat money laundering, and improve player protection, thereby restoring Curaçao's reputation in the global gaming industry.



## Germany

Germany is tightening the reins on iGaming regulation in order to protect consumers. First of all, the German Gambling Authority reviewed legislation on [loot boxes](#), supporting stricter control and monitoring to safeguard children and youth from gambling-like in-game mechanics. Additionally, the country banned streamers from [advertising](#) gambling activities.

This April the Federal Court of Justice of Germany (BGH) initiated proceedings concerning players' claims for compensation for losses from historical bets. This is the first case concerning [historical losses](#) to be heard by the country's highest court.



## Spain

Spain introduced stricter measures to regulate iGaming and gambling advertising in 2024.

For example, the country tightened oversight of iGaming winnings, requiring all players to declare their earnings, regardless of the amount, and introduced a progressive tax rate on winnings ranging from 19% to 45%. New rules restricted [online gambling ads](#), banned celebrity endorsements, and increased regulation of [loot boxes](#) and identity verification in video games. In addition, the Spanish regulator plans to create a unified database of players from licensed operators to ensure comprehensive oversight of the gambling industry.

At industry conferences, the idea has often been raised that regulatory compliance absorbs so much of operators' attention that customer satisfaction falls to a lower priority, even below second or third place. This is understandable, given the complexity of compliance requirements in different countries and even different states or regions within the same country.

# Most Pressing Issues for the Respondents

**2** The **Competition** holds second place with 15% of the votes. However, it appears that success in the market is no longer determined solely by the quality of products or customer service. Instead, it hinges on a strategic evaluation of key factors:

- a)** the marketing budget operators are prepared to invest when entering new markets,
- b)** the duration for which a new market is expected to operate at a loss,
- c)** the ability to leverage profits from established markets to offset initial costs in new markets until they become profitable.

## Important notes: Much Higher Risks

Due to the significant increase in risks, operators are now considering what they should avoid doing rather than solely focusing on what they should do. Instead of asking “Where should we go?” they are going very soon to ask: “Where should we not go?” This shift is a result of the significant costs (and risks) associated with regulation and compliance. Back in 2021, almost any European gaming company dreamt of entering the US market. Everybody was confident that the market was so huge that everyone would get a fair bite. What do we see now? The companies have been massively leaving the land of milk and honey.

**3** In 2023, 29% of respondents emphasised the critical significance of regulation. However, this number has decreased by 10% in 2024, with only 19% of respondents voting for the issue. This shift can be attributed to sharpening of a few other problems, the primary of which is the challenge of **Innovation adoption**, which received 12% of the votes.

# Most Pressing Issues for the Respondents

- 4 The respondents gave equal votes to the next three issues—by 11% for each: **Recruiting**, **Organisational issues due to growth**, and **Adaptation to new markets**. In 2023, organisational restructuring and recruiting were voted by only 6% of respondents, and 7% voted for adaptation to new markets. The growth of the figures is not accidental.
- 5 The explosive growth of a company when it has to simultaneously enter a newly opened market and secure some position there within a few months becomes a serious problem.
- 6

## Important notes: Legalisation in Brazil

When Brazil announced that companies could apply for sports betting licences, approximately 80 companies were already operating in the market. Notably, the number of companies in the market doubled within four months after the bill was signed.

When new companies rushed into the market, all of them encountered challenges such as a shortage of potential partners, limited office rental options, and difficulties in hiring employees. Therefore, establishing a presence before official legalisation can offer significant advantages to early entrants.



# CEOs' Challenges in 2024

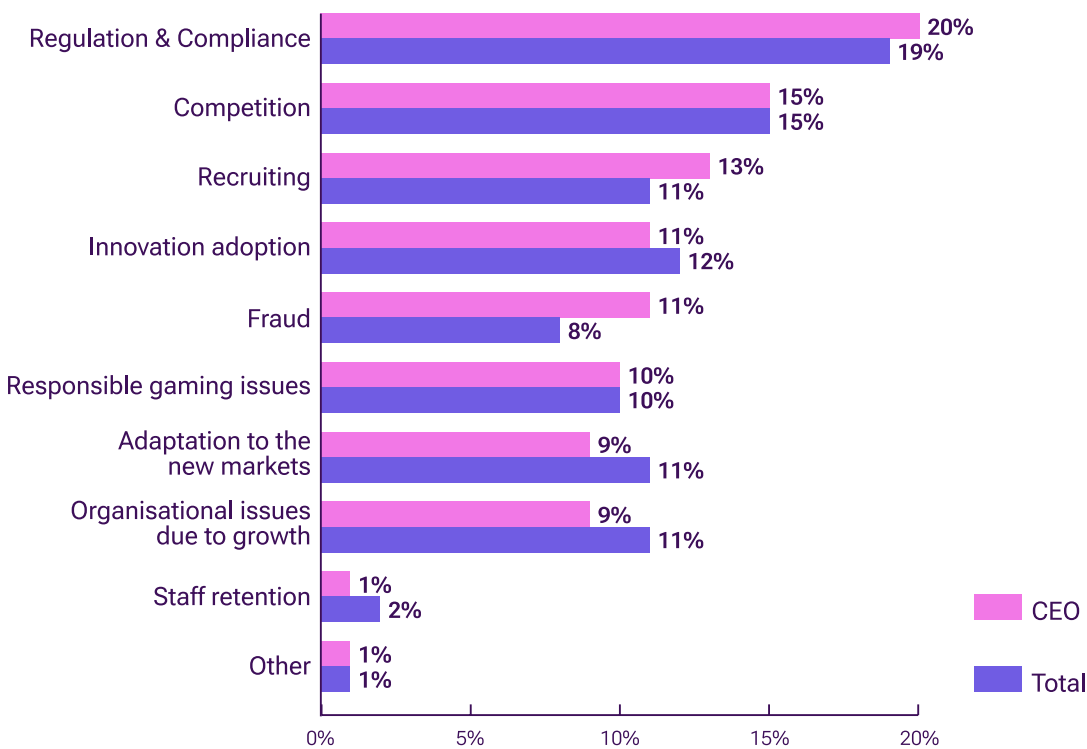
For the CEO, the top two concerns remain unchanged from the general list: **Regulation and Competition**. However, there is a slight increase in the percentage of votes for Regulation, which now stands at 20%, a 1% increase. Notably, **Recruiting** maintains its third-place position, just as it did last year, with 13% of the votes.

## Important notes: Recruiting issues

Hiring local specialists in new territories who would genuinely invest in the entering company's success is essential. However, the problem arises when CEOs face individuals who claim to be experts in their local markets but in reality dramatically lack the appropriate credentials. There are many such cases in the African countries where there are locals with brilliant English more pretend to be working than truly do the work. It becomes crucial to have a physical office in the emerging market with few representatives from a parent company, which means finding employees ready to move into the unfamiliar environment.

**Innovation adoption** and **Fraud** issues share third and fourth place, each receiving 11% of the votes.

CEO's Challenges



## Expert's opinion

I have noticed a couple of changes compared to the previous year:

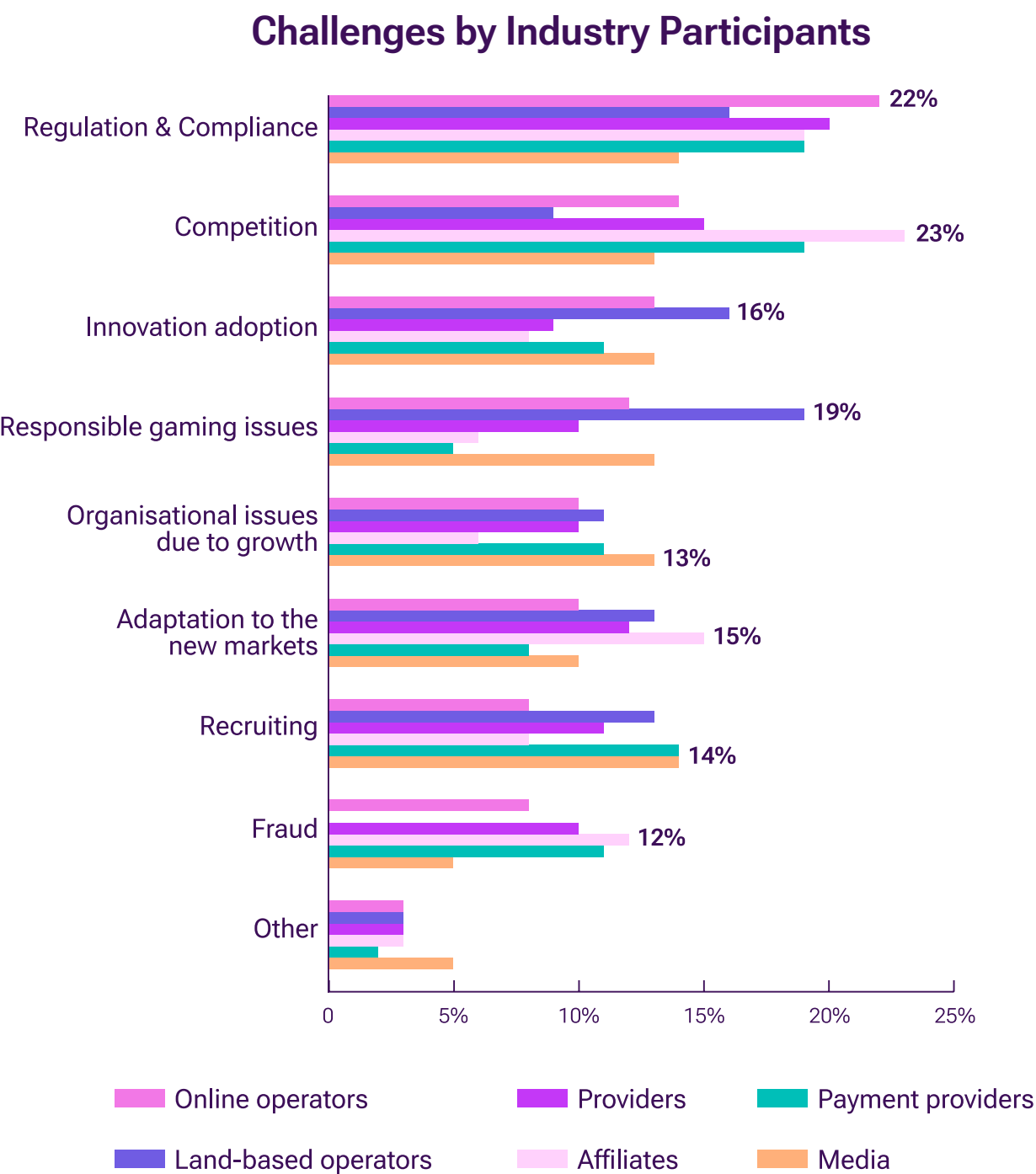
**Innovation adoption:** The focus has shifted from mobile platforms and online casinos to actively implementing artificial intelligence (AI) to enhance the user experience.

**Stronger Emphasis on Responsible Gaming:** While this topic received less attention last year, it has become a top priority in 2024 due to the increase in addiction cases and pressure from regulators.

Dmitry Starostenkov,  
CEO of EvenBet Gaming



# Do Different Industry Participants Have the Same Challenges?



As shown in the chart, a varied picture emerges, with each challenge category having a distinct leader.

**Regulation & compliance:** This is the primary concern for online operators, garnering 22% of the votes, followed by providers at 20%.

**Competition:** Affiliates lead this section, with 23% of respondents identifying it as a key issue, while payment providers are close behind with 19%.

**Innovation adoption:** Land-based operators are most concerned here (16%), followed by mass media and online operators, each receiving 13%.

**Responsible gaming:** Land-based operators are again at the forefront with 19%, with media following at 13%.

**Adaptation to new markets:** Affiliates consider this the main challenge (15%), with land-based operators also flagging it as significant (13%).

**Recruiting skilled professionals:** Media and payment providers each claim 14%, with land-based operators trailing (13%).

**Fraud:** This is a pressing issue for affiliates (12%), payment providers (11%), and providers (10%).

Interestingly, Affiliates stand out as leaders in three categories: **Competition**, **Adaptation to new markets**, and **Fraud**.

Land-based operators have become leaders in two segments: **Responsible gaming** and **Innovation adoption**.

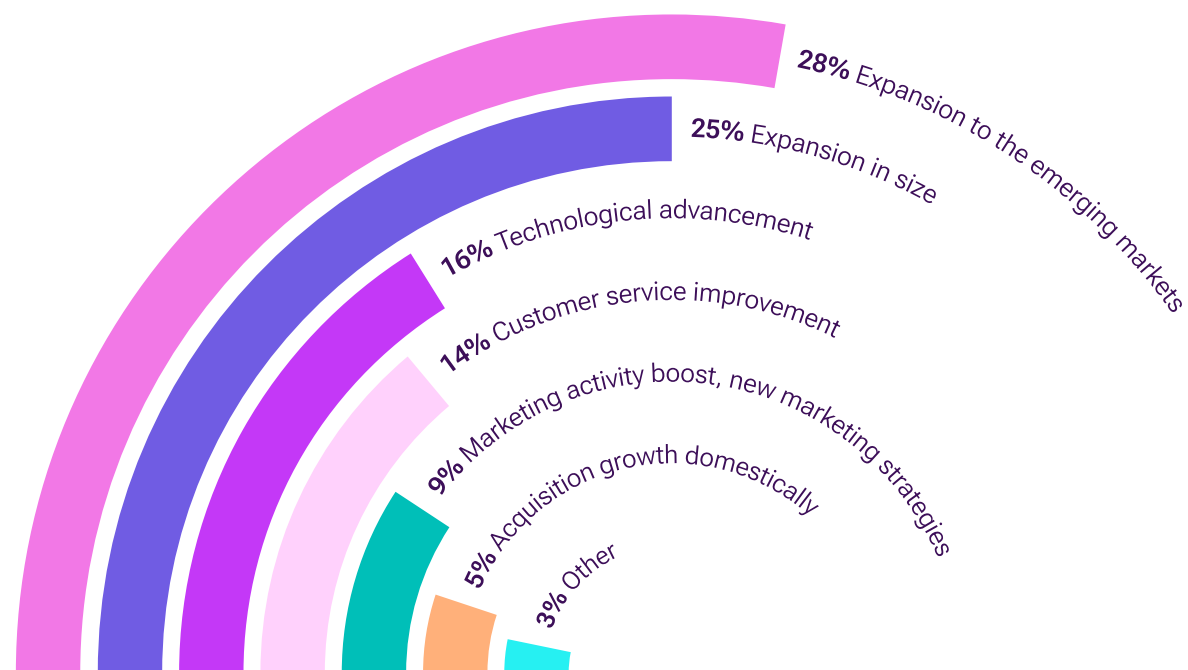
# Main Trends in the Respondents' Focus in 2024



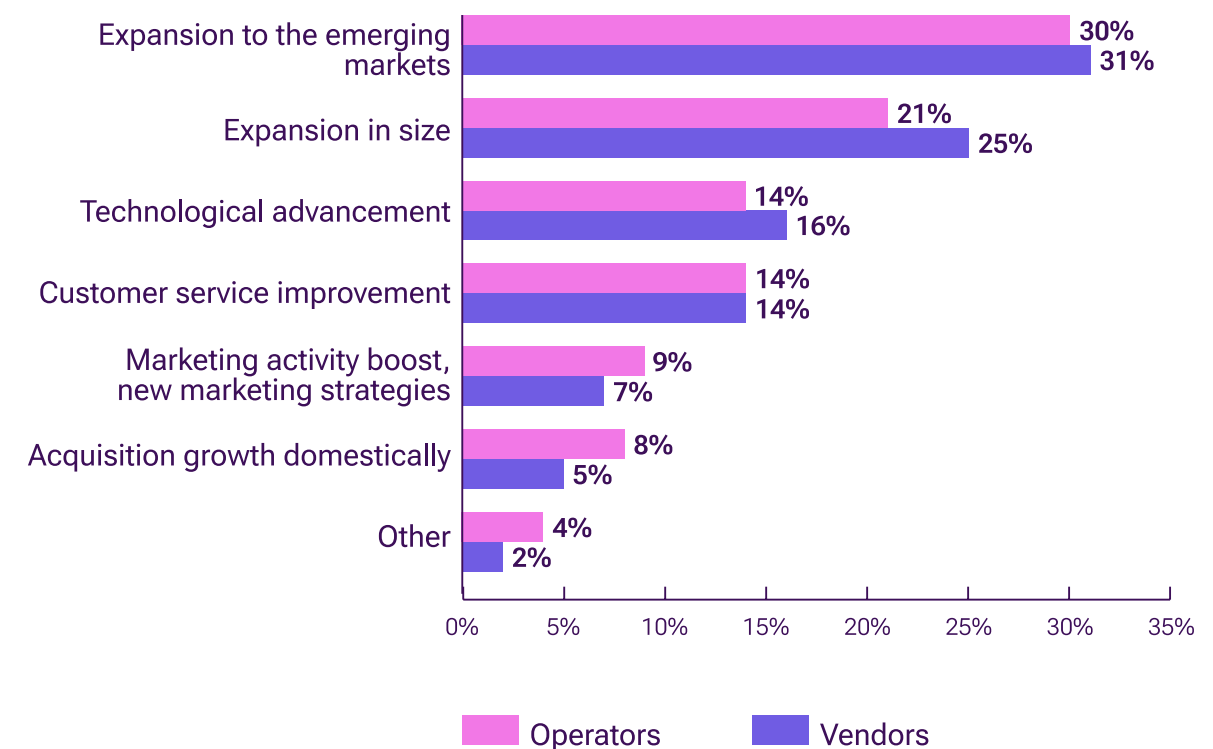


# Main Trends in the Respondents' Focus in 2024

Companies' Focus



Main Focus Operators/Vendors



The companies' focus on **Expansion** and growth stands out as the leading priority in this section, accounting for a significant 53% of votes if we take two types of **Expansion** together—in **size and into the emerging markets**. Notably, both types of expansion garnered similar levels of support. Expansion into the emerging markets captured 28% of votes, while expansion in size secured 25%. These statistics point to the fact that presently the iGaming industry is going through a rip-roaring phase when companies are actively seeking to claim their desired share of new and emerging markets.

## Do Operators and Vendors Have the Same Focus Targets?

It is notable that both operators and providers consider the **Expansion of the first and second types** as equally important. Operators gave 51% of their votes to this issue, while providers gave slightly more at 56%.

Operators and providers are nearly unanimous in ranking their most pressing issues this year.

# Main Trends in the Respondents' Focus in 2024

**2** **Technological advancement** ranked second for both operators and providers, with 14% and 16% of votes, respectively. Overall, technology came in second place, garnering 15% of votes.

**3** In third place we finally see something said about the customer—**Customer service improvement**, noted by 14% of respondents.

**5** Surprisingly, **Marketing and marketing strategies** dropped to the bottom of the list this year, receiving only 9% of the total votes.

## Expert's opinion

In 2024, most modern iGaming companies faced significant challenges in achieving operational efficiency within their departments. We particularly focused on improving **operational efficiency** within the Customer Success department. As interest to the iGaming industry continues to grow and the market expands rapidly, we recognised the need to prepare for the increasing influx of clients. This required a fundamental change in our approach to **handling workflows within the company, potentially even leading to a reconsideration of our organisational structure**.

Although **AI** has been introduced, it is still not suitable for working with B2B customers. Corporate clients still expect a personalised approach and real people who will delve into their business and help develop it. Our goal is to build a business together with clients and provide a safe space for iGaming.

The globalisation of the iGaming industry and expansion into new markets has created a demand for customer **support in multiple languages**. To meet this need, well-trained customer support specialists who are fluent in multiple languages, such as Spanish and Chinese, are essential in providing assistance to customers in their native language.

Ekaterina Nebogina,  
Customer Success Director at EvenBet Gaming



# Main Trends in Technology: Innovations Implemented Recently

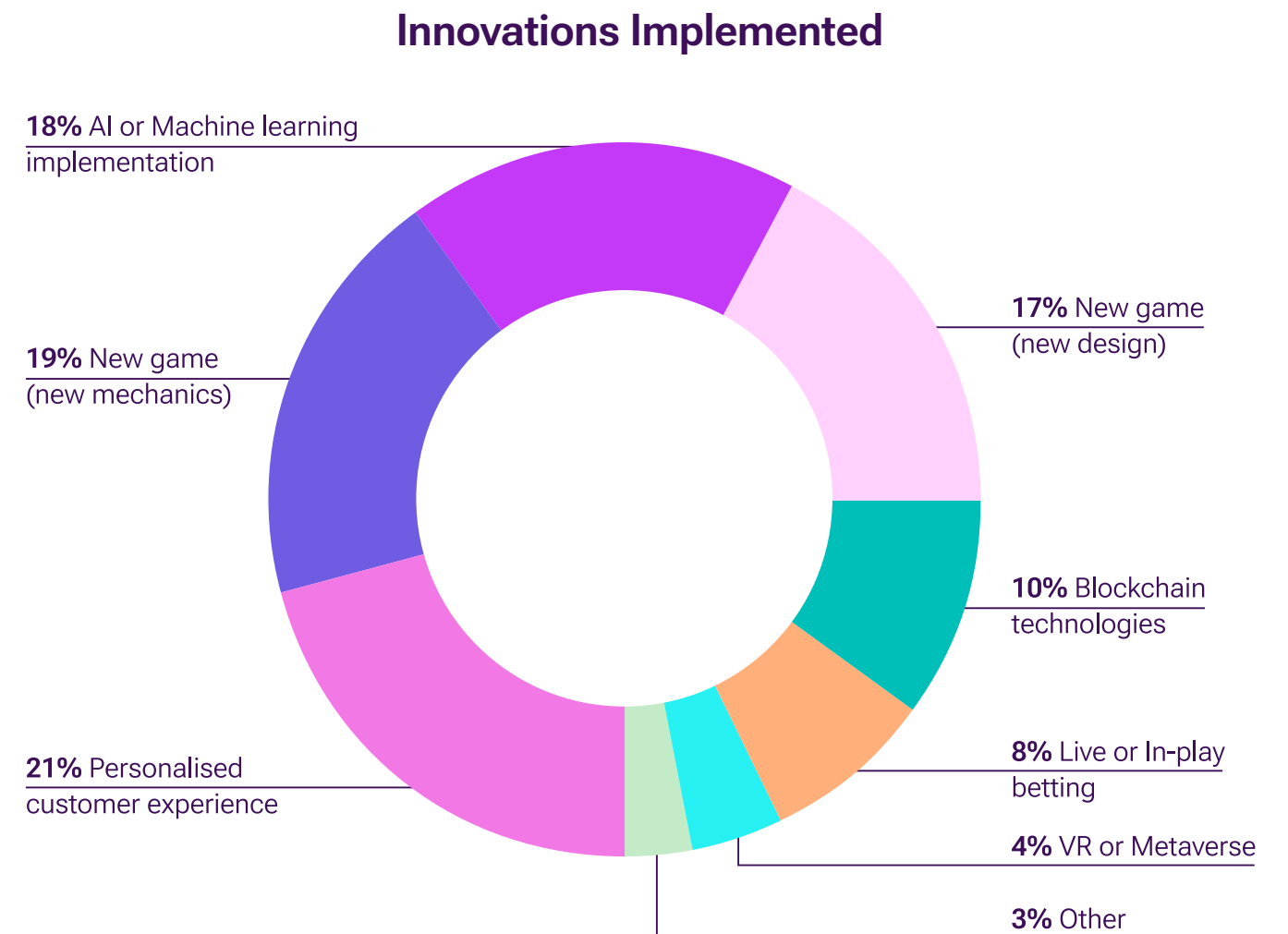




# Main Trends in Technology: Innovations Implemented Recently

1 Finally, the client is at the forefront when it comes to technology. **Personalised customer experience** takes first place, with 21% of the votes.

2 In second place is the **Creation of games with new mechanics** (19%). This is understandable, as competition forces businesses to constantly diversify content. Furthermore, it is unpredictable which new game might take off, so systematic content extension is a must.



# Main Trends in Technology: Innovations Implemented Recently

3

Third place is confidently taken by **AI and machine learning implementation** (18% of the votes). Perhaps AI technologies also aid in solving the priority task of personalisation.

4

**New games with novel designs** take fourth place, confirming that content is paramount.

5

**Blockchain technologies** rank fifth, earning 10% of the votes.

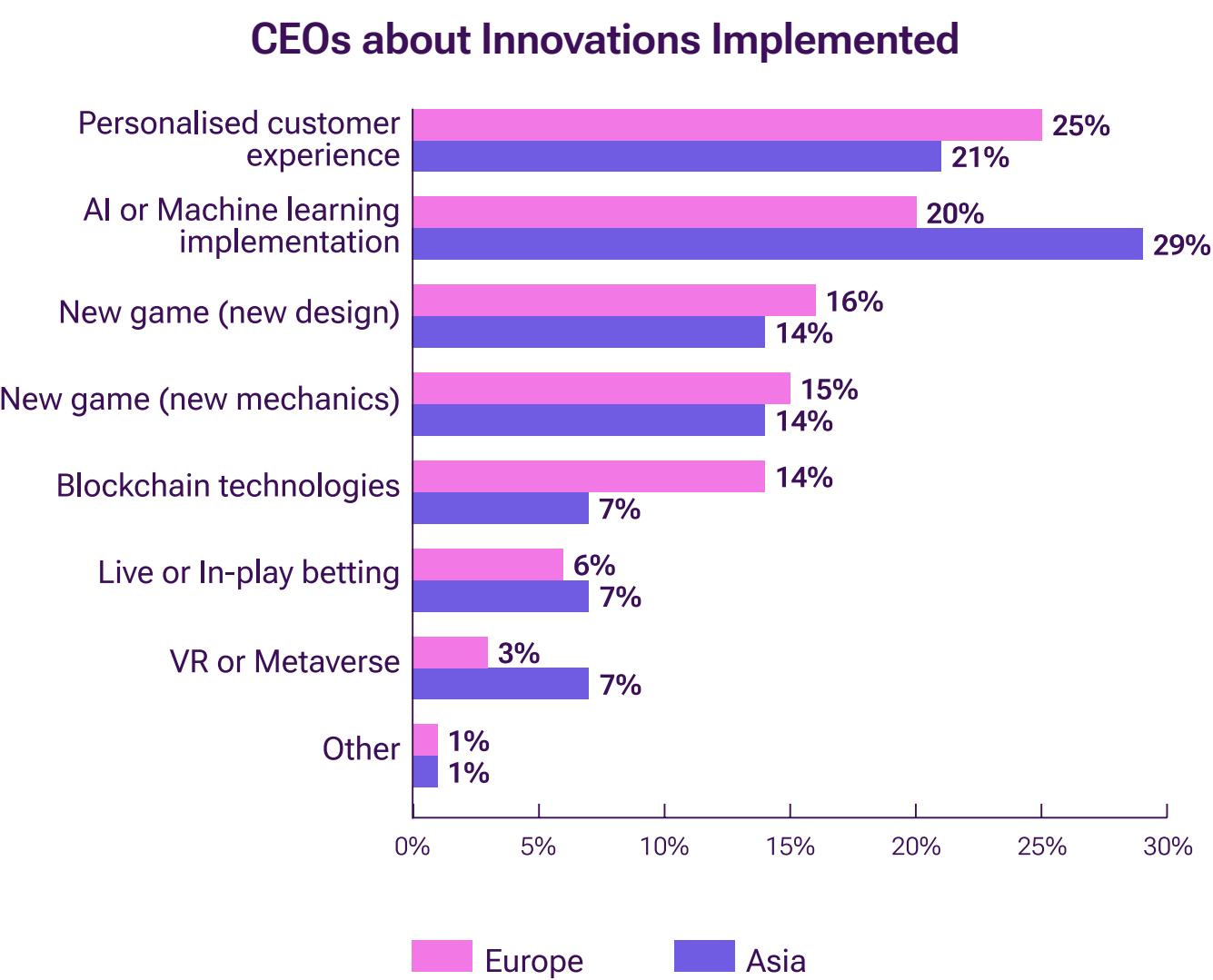
## Expert's opinion

Currently, it is hard to find areas in our activities where AI's applicability is limited. The main areas where AI is being used are support, anti-fraud, content personalisation, and content production.

Alexander Tamplon,  
CTO at EvenBet Gaming



# CEOs' Answers on Innovations Implemented



As we can notice, the top management in Asia is mainly focused on the implementation of **AI and machine learning technologies**—29% votes, **Personalised customer experience** goes second with an 8% difference—21% of respondents speak of those implementations. In Europe's top 1 priority in tech—**Personalised customer experience** with a 25% share of voices, **AI** holds second place with 20% of votes.

**Blockchain technologies** are a subject of much higher attention for the European CEOs than for those in Asia—14% against 7%. The reason may lie in the adoption of these technologies in the Asian region much earlier in previous years.

**VR/Metaverse** topic is also more popular in Asia with 7% of respondents working in that direction. In Europe, the interest in the issue is quite low—around 3%.

Expert's opinion

**Artificial Intelligence:** AI is used to personalise content, analyse player behavior, and prevent fraud. This results in more adaptive and safer gaming environments.

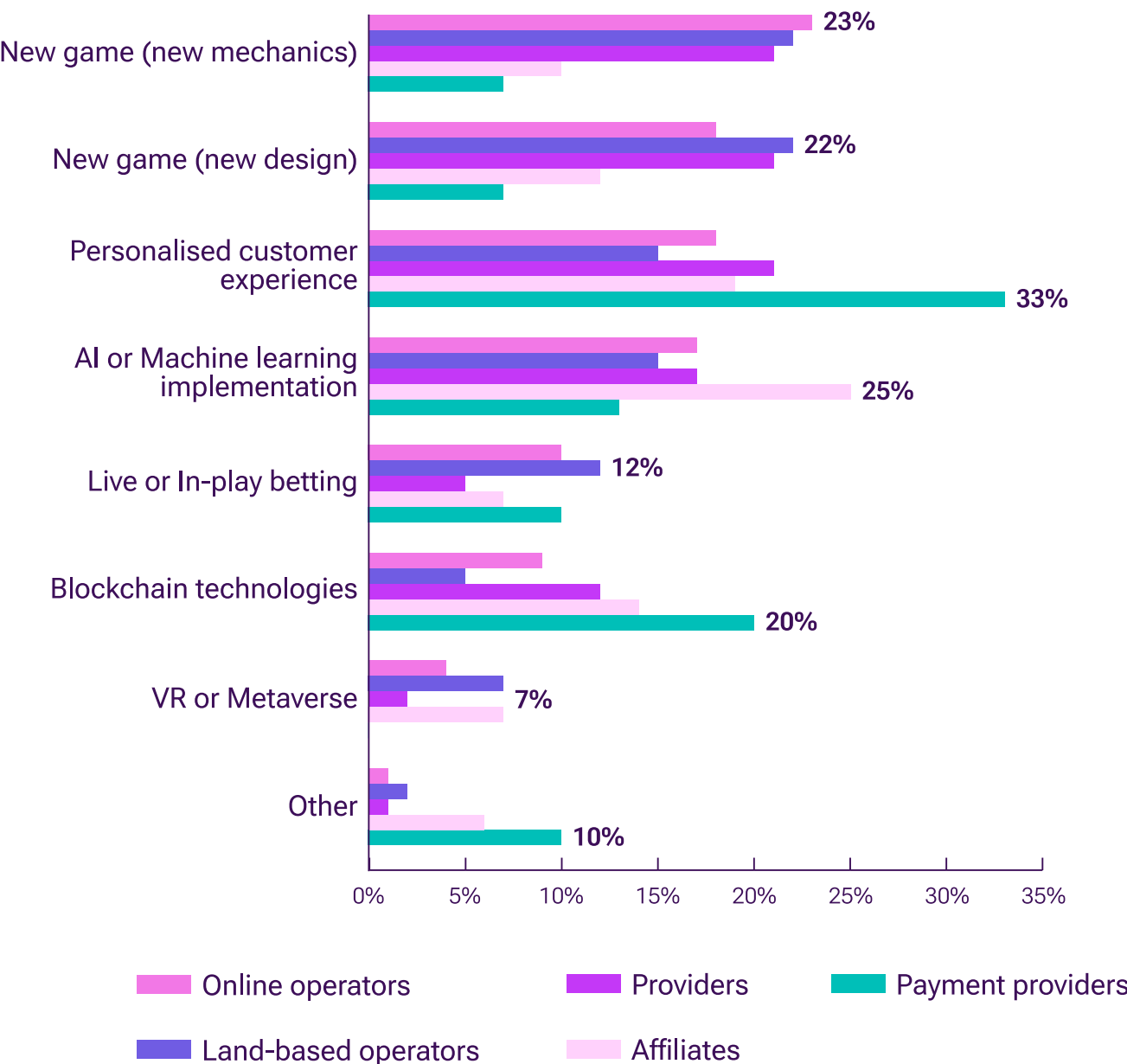
**Virtual Reality and the Metaverse:** VR technologies and the concept of the metaverse are gradually integrating into online gambling, providing players with more immersive experiences. However, high costs and technical limitations are holding back the widespread adoption of these technologies.

Dmitry Starostenkov,  
CEO of EvenBet Gaming



# Technology Priorities by Different Industry Participants

Main Innovations Implemented by Different Industry Participants



It is exciting to analyse which innovations resonate most with different sectors of the gaming industry.

**Online operators** lead in introducing games with new mechanics, accounting for 23% of innovations implemented. This is followed by games featuring new designs and technologies focused on personalising the customer experience, each with 18%.

**Land-based operators** prioritise content equally, with 22% of votes for both games with new mechanics and games with new designs.

**Providers** highlight a strong alignment with operator needs, with three categories—games with new mechanics, new designs, and customer personalisation—tied at 21% each.

# Technology Priorities by Different Industry Participants

**Payment providers** focus heavily on personalisation technologies, with 33% of respondents implementing solutions in this area. Blockchain technologies follow, adopted by 20% of respondents.

For **affiliates**, AI is the top priority, with 25% investing in related technologies, while personalisation ranks second with 19%.

**VR and Metaverse technologies** have seen limited adoption across the industry, with only 7% of affiliates and land-based operators, 4% of online operators, and 2% of providers showing interest. Payment providers, notably, expressed no interest in these innovations.

## Expert's opinion

Speaking of the biggest challenges technology specialists faced this year:

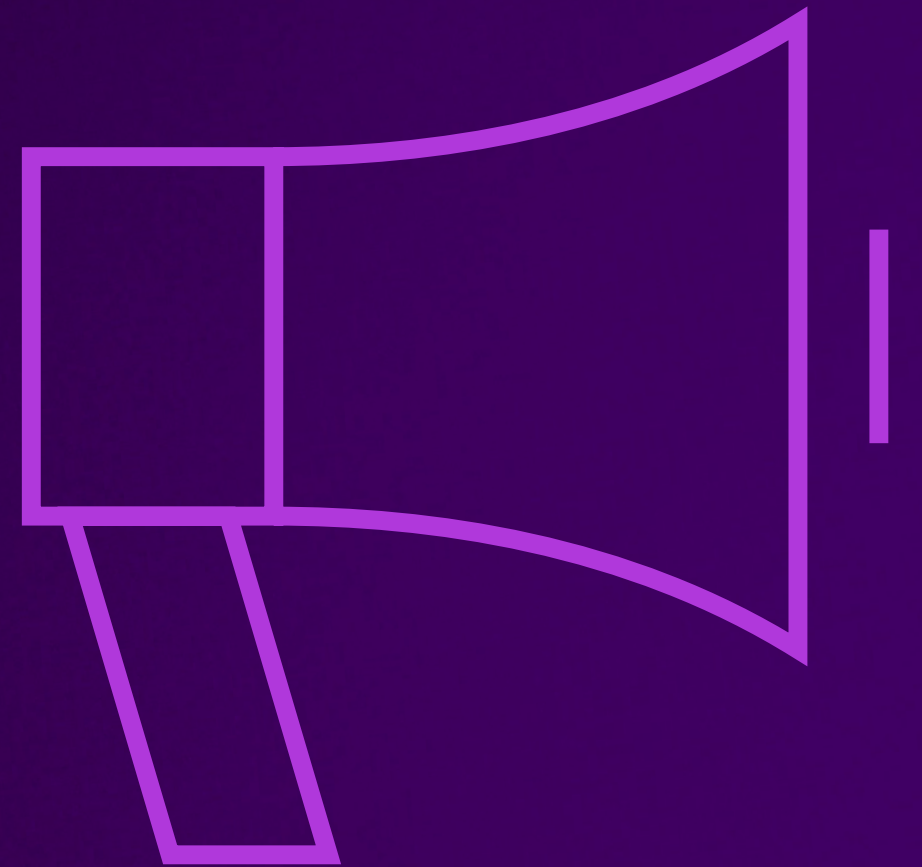
- 1. How to integrate AI Tools Effectively:** There is a significant need to integrate AI tools seamlessly into development and operational cycles.
- 2. Security Issues:** Cyberattacks are becoming more affordable for attackers, while protection measures are increasingly costly.
- 3. Time-Consuming Mobile Device Support:** The market is highly fragmented, and strict regulatory requirements from Apple and Google result in a substantial amount of time spent on supporting mobile users.
- 4. Market Regulation and Responsible Gaming:** Significant efforts are invested in supporting the regulation requirements for software in different regions. There is no universal standard of licencing the iGaming software, therefore providers are forced to produce a different version for each market.

Alexander Tamplon,  
CTO at EvenBet Gaming



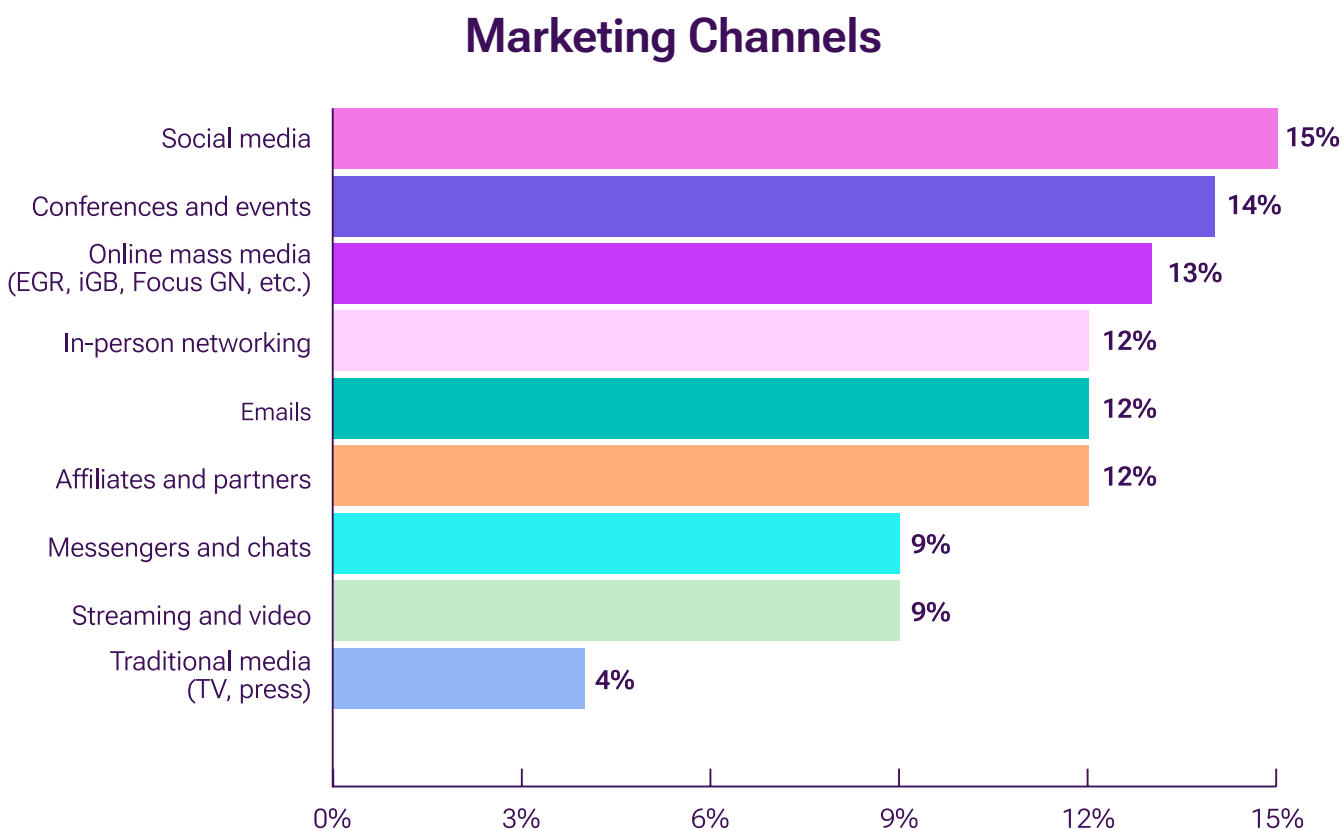
# Main Important Marketing Channels :

How to Build Business  
Effectively



# Main Important Marketing Channels

This year, we decided to reframe our question and ask it more directly: where do you primarily get your information about the iGaming industry developments? The purpose of this question was to understand which channels capture the attention of respondents who are under significant time constraints.



The overall results were quite unexpected. Last year, social media confidently led with 31% of respondents citing it as their primary source of information. However, this year, six channels received nearly equal attention. The top three sources of information were **Social media** (15%), **Conferences and events** (14%), and **Online mass media** (13%).

Interestingly, three more channels received exactly the same number of votes (12%): **In-person networking**, **Emails**, and **Affiliates and partners**.

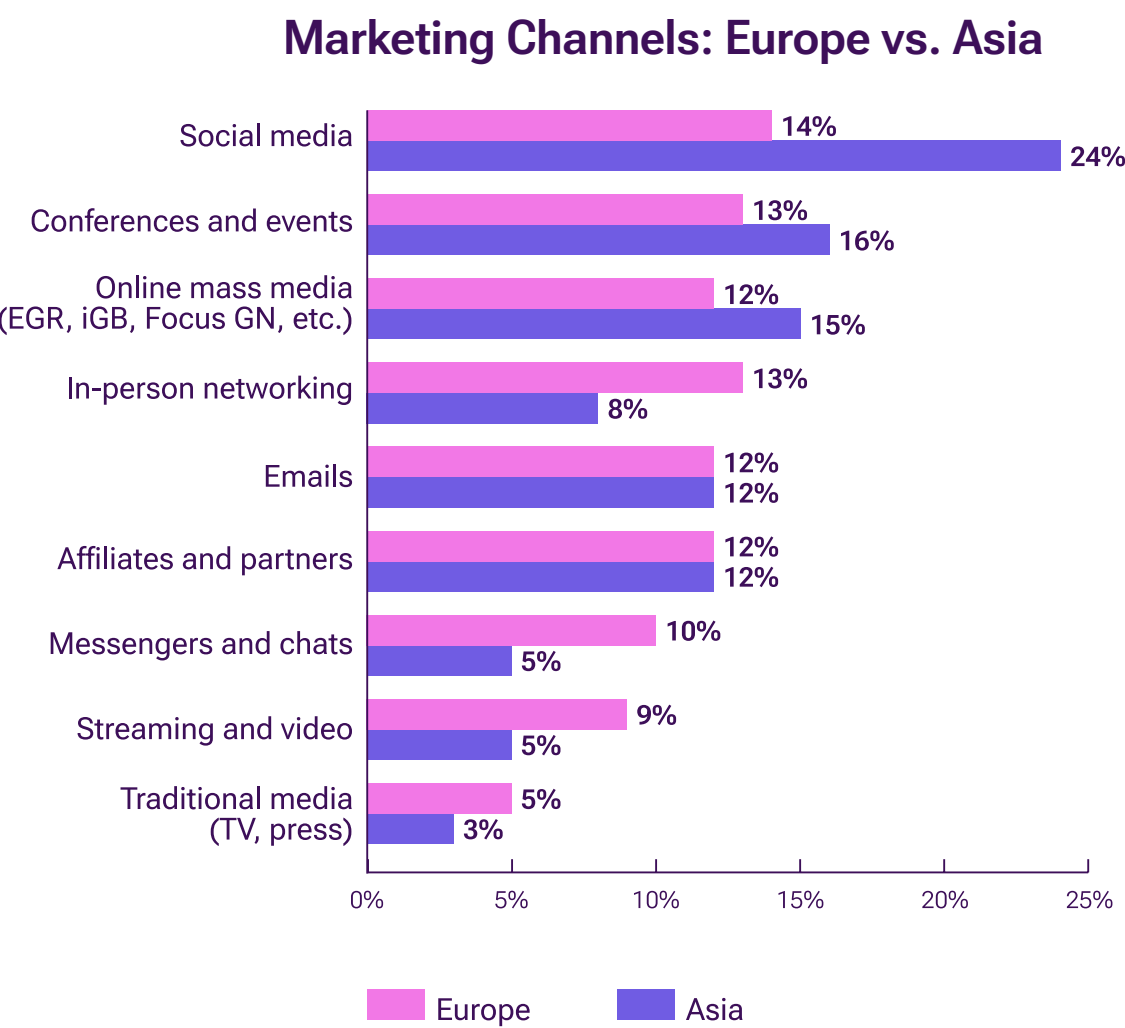
This suggests that emails have not lost their relevance and are still widely used in today's world. Despite notions that this channel is outdated and unpopular, it remains a very effective and efficient means of communication. In fact, many well-known media personalities in the industry duplicate their social media digests through email newsletters.



# Marketing Channels: Europe vs. Asia

When examining marketing channels through the lens of Europe and Asia, a distinct picture emerges.

In Asia, Social media reigns supreme, capturing 24% of interest, compared to just 14% in Europe. Additionally, Asians exhibit higher interest in Events and Online mass media, with 16% and 15% respectively, compared to Europe's 13% and 12%. In contrast, Europe displays a more balanced distribution of attention across different channels, without any particular emphasis.



Interestingly, messengers have twice the popularity in Europe as in Asia, garnering 10% of votes compared to Asia's 5%. A similar trend is observed for video content, with Europe accounting for 9% and Asia for 5%.

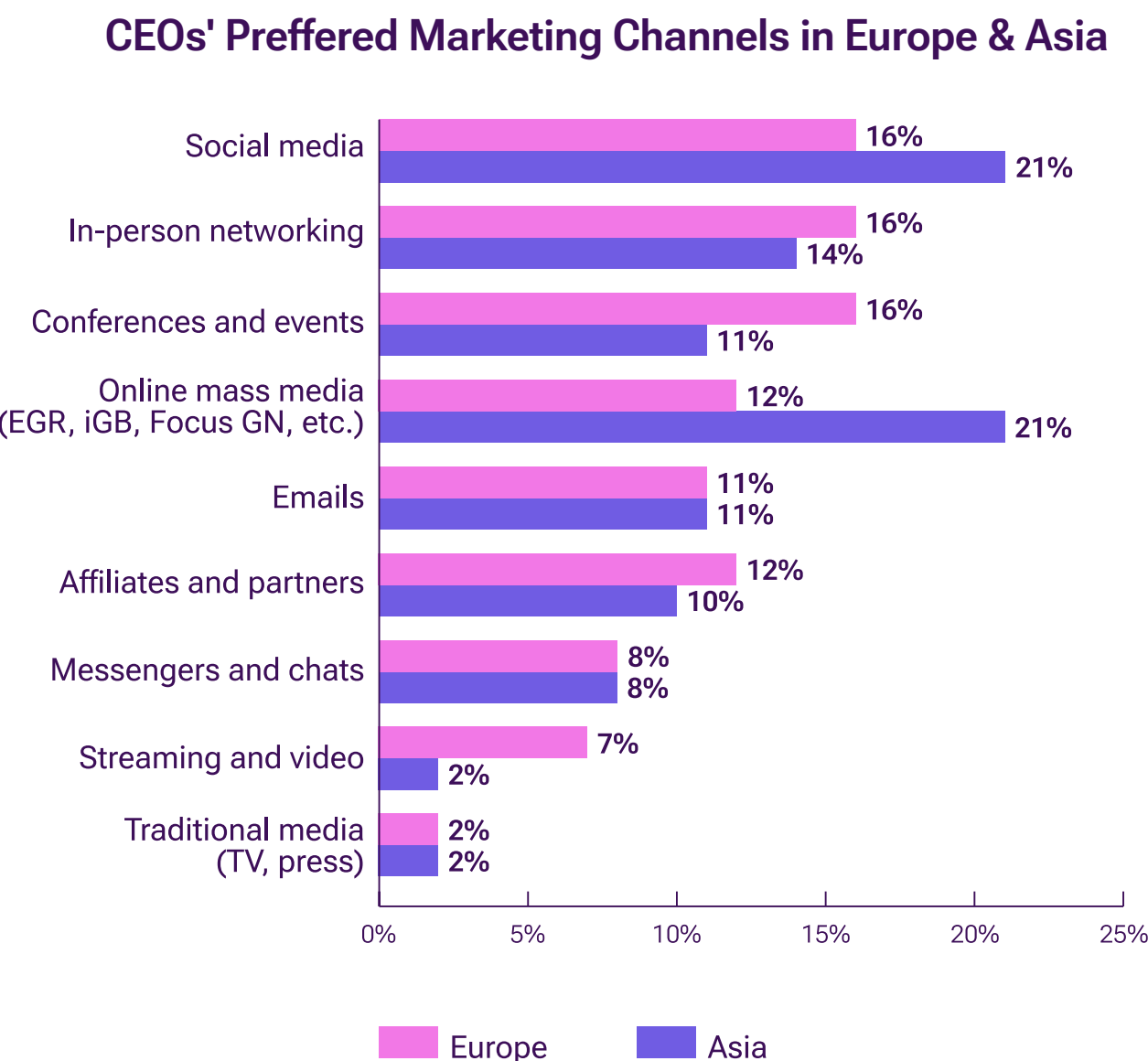
## Expert's opinion

A recognisable story that can be shared across various marketing channels is crucial. In Europe, we're noticing that the significance of different channels is becoming more balanced. Why is this happening? Because creating content has become more accessible; previously, it was limited to priority areas, but now it can be found everywhere — though the formats may vary. With the expansion of platforms, it's essential to ensure that a single story is communicated consistently. There is ample time to focus on its creative aspects.

Alexandra Voronetskaya,  
CMO at EvenBet Gaming



# Marketing Channels: What CEOs use in Europe & Asia



In Europe, the top three channels for CEOs to obtain industry information are **Social media**, **In-person networking**, and **Events**, each receiving 16% of votes. In Asia, however, the situation differs. The most important channels for CEOs are the **Online mass media** and **Social media**, both with 21% of votes, while In-person networking comes in third with 14% of votes.

This difference may be explained by numerous events in Europe that company heads regularly attend. By attending these events, they establish closer connections with each other and primarily receive news from one another. In Asia, CEOs still rely more on the internet for news and information, specifically the mass media and social media.

## Expert's opinion

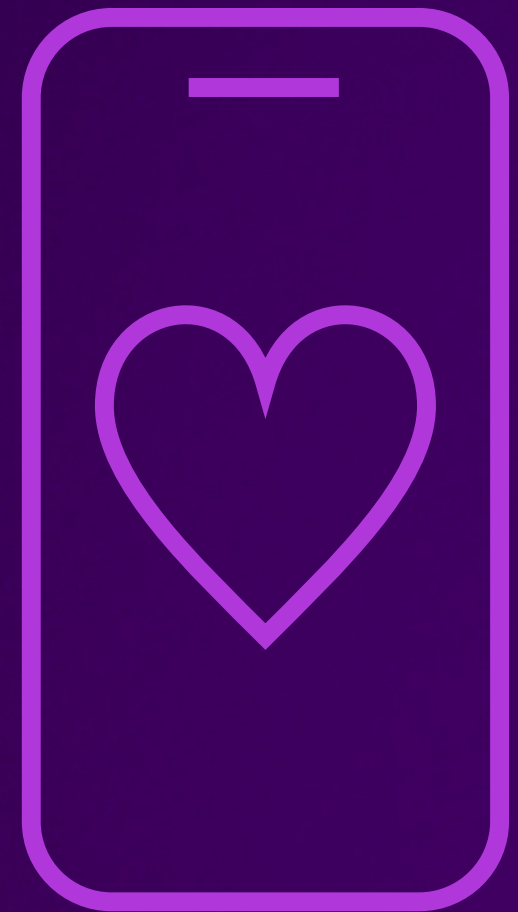
Events and communications in iGaming have entered a period of recalibration. While major trade shows remain vital, companies scrutinise their ROI more closely than ever. Events must now deliver tailored content, meaningful networking, and transparent business outcomes to justify investment. Simultaneously, virtual and hybrid formats complement physical gatherings, providing accessibility and scale.

In communications, brands are increasingly adopting integrated, multi-channel strategies. Thought leadership, personalised content, and direct engagement—mainly through professional platforms like LinkedIn—are taking centre stage. Success today hinges on a consistent, authentic narrative that resonates across channels and regions.

**Kate Chambers,**  
Founder of The Gaming Boardroom,  
Independent Consultant



# Social Media: Leading Channels



# Social Media: Professional vs. Personal Usage

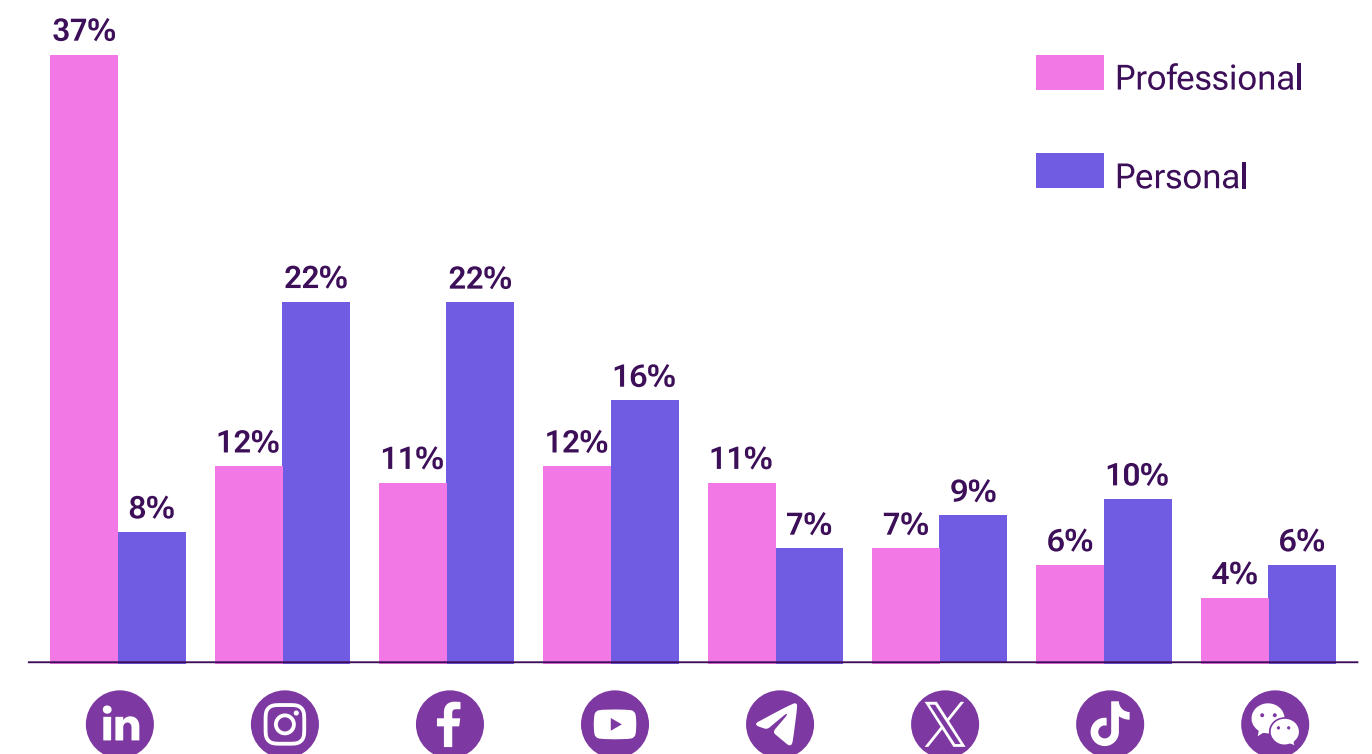
The purpose of social media usage has long been categorised into two areas: professional and personal.

LinkedIn is the leading professional social network, with 37% of respondents using it for work-related tasks compared to only 8% who use it for personal interests.

In terms of professional use, other social media received significantly lower percentages: Instagram (12%), YouTube (12%), Facebook (11%), and Telegram (11%). There is no clear preference or significant separation among these networks. X network received only 7%, and TikTok received 6%.

For personal use, Instagram and Facebook are equally popular, each receiving 22% of the votes. YouTube is in third place with 16% of the votes, followed by TikTok with 10%.

Social Media: Professional & Personal Usage



## Expert's opinion

Our research shows that LinkedIn is still the most relevant social marketing channel for vendors, far ahead of Facebook, Insta, Twitch, ... But LinkedIn has lost relevance in the last 2 years as it became "too crowded". It is so much harder now to achieve relevant organic impressions or replies for direct (cold) messages.

Martin Oelbermann,  
Director of Online Gambling Quarterly





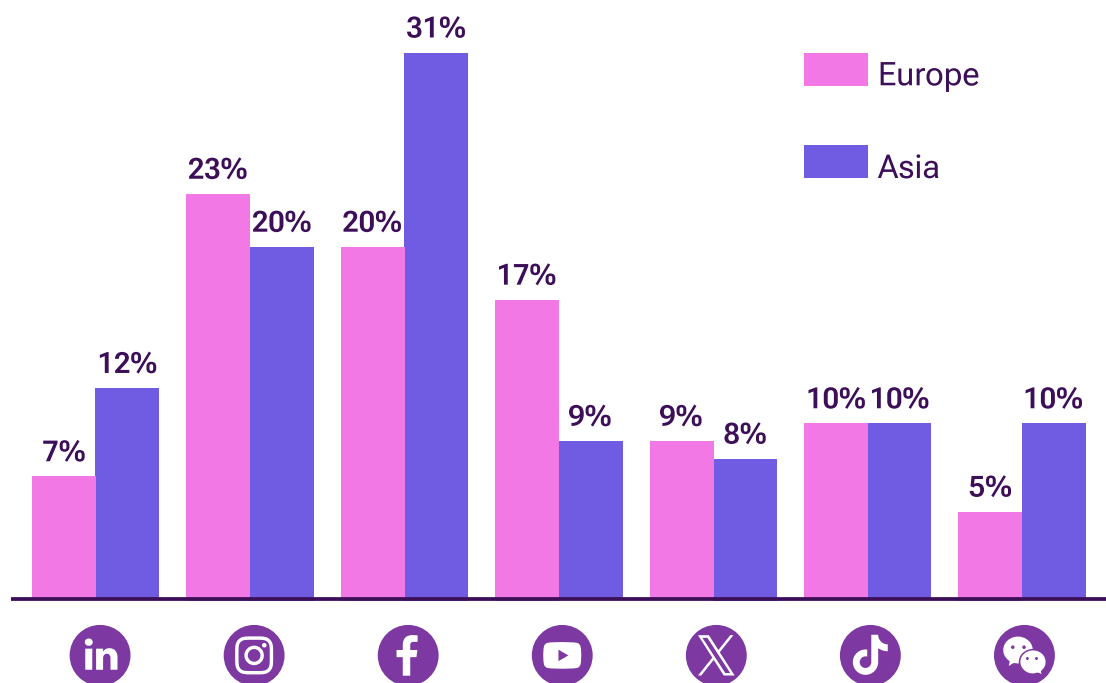
# Social Networks in Europe & Asia

## Social Networks in Europe & Asia: Personal Usage

In Asia, Facebook dominates personal use by a significant margin, securing 31% of preferences. Instagram follows at 20%, with LinkedIn at 12%. TikTok and WeChat are tied at 10%, while YouTube and X network round out the rankings with 9% and 8%, respectively.

In Europe, Instagram slightly edges out Facebook with 23% compared to 20%. YouTube holds a strong third place at 17%. TikTok is less popular at 10%, followed by X at 8%, LinkedIn at 7%, and WeChat trailing at 5%.

Personal Social Media Usage: Europe vs. Asia

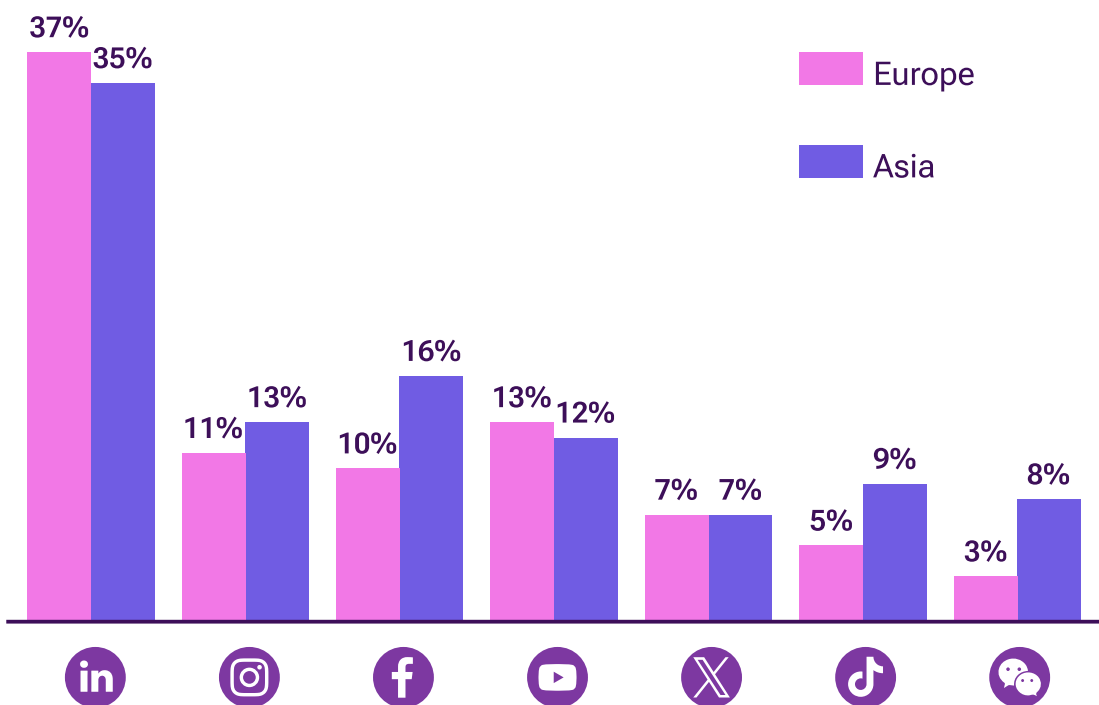


## Social Networks in Europe & Asia: Professional Usage

In general, the trends in the professional use of social media in Europe and Asia are nearly identical, although the voting percentages differ slightly. LinkedIn leads the pack with 37% in Europe and 35% in Asia. The most significant gap is seen in votes for Facebook: Asia gave 16%, while Europe only gave 10%. Instagram has a much smaller gap, with 13% in Asia and 11% in Europe.

YouTube received 13% in Europe and 12% in Asia, and X—7% in both Europe and Asia. The most significant differences are at the end of the list. In Asia, 9% of respondents voted for TikTok, compared to only 5% in Europe. WeChat received 8% in Asia and only 3% in Europe.

Professional Social Media Usage: Europe vs. Asia



# How to Attract the Best Employees?

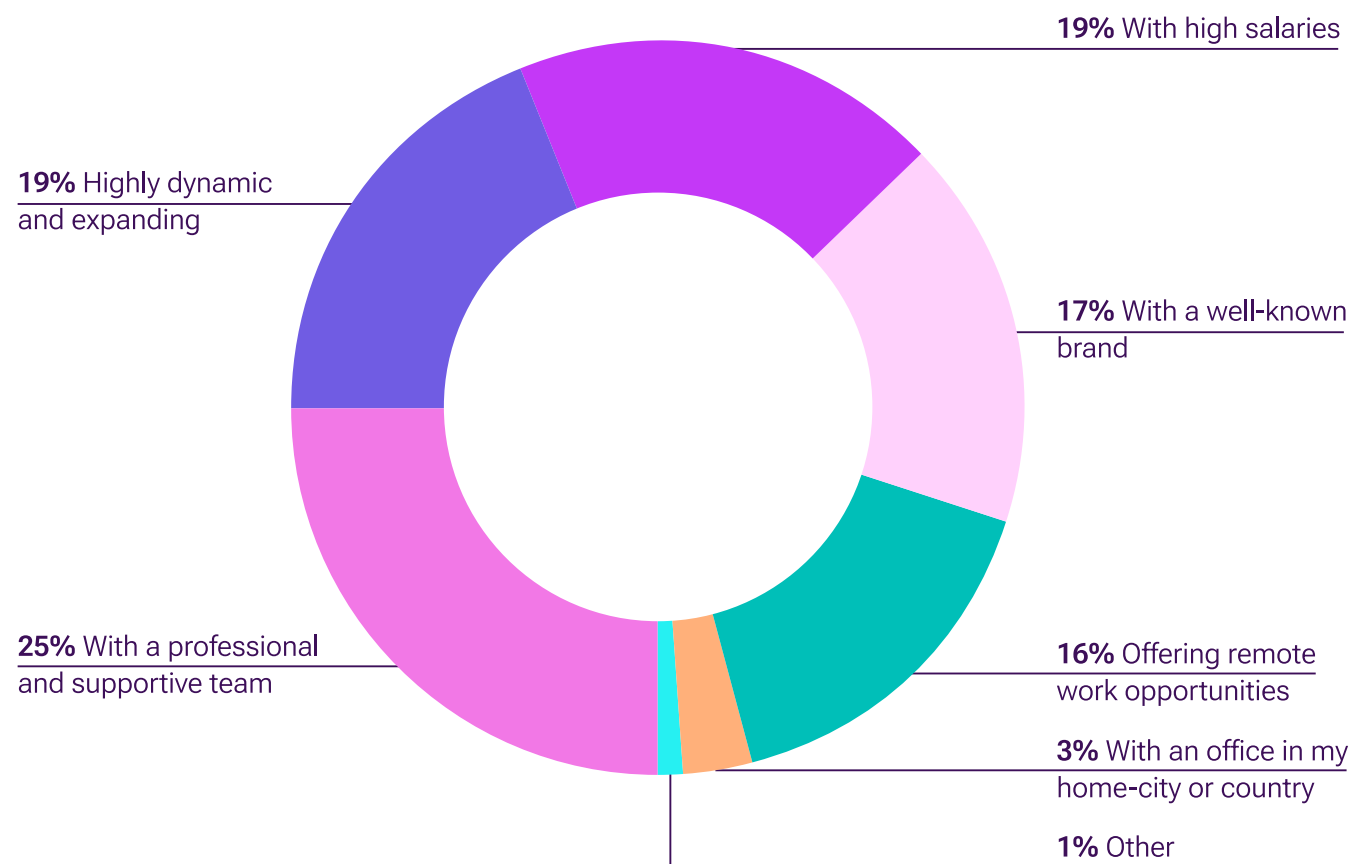
What Factors Matter  
When Choosing  
a New Employer?



# How to Attract the Best Employees? What Factors Matter When Choosing a New Employer?

When interviewing a potential candidate, it's crucial to ensure the conversation is as productive as possible. First, it's important to assess how well the candidate fits the specific role and company. But once it's clear they are a good match, what aspects of the company should a recruiter highlight to secure their interest and prevent them from accepting another offer? We turned to experts in the iGaming industry, as the unique dynamics of this sector often influence candidates' final decisions.

## What Kind of Company Would You Prefer to Work in?



1 The leading factor, cited by 25% of respondents, is a **Professional and supportive team**. Convincing a candidate during a single interview that fostering a strong, collaborative team is a top priority may be challenging. However, this can be effectively conveyed through the company's social media presence and website. Candidates often research potential employers online, and showcasing the company's internal culture, team dynamics, and HR priorities can make a significant impact. This is why building an employer brand through HR-focused content is critical. Posts highlighting not just the company's products and client relationships but also its internal environment and team-related stories help convey a holistic view of the organisation.

# How to Attract the Best Employees? What Factors Matter When Choosing a New Employer?

2 Unsurprisingly, **High salaries** ranked high, with 19% of respondents listing it as a key factor. However, an equally significant percentage cited the appeal of a **Highly dynamic and expanding company**.

3 This reveals that in the iGaming industry, professionals value not just competitive salary but also the opportunity to work in a company that evolves, achieves its goals, and embraces change. A dynamic industry requires equally dynamic employees, making this insight a valuable marker for HR professionals. If a candidate expresses interest in a growing organisation during the interview, they may be a strong fit for an iGaming company, even if they come from a different sector.

4 **Brand recognition** was important to 17% of respondents, while 16% prioritised the option to **remote work**. This suggests that while brand reputation is valued, it's not a decisive factor in the iGaming industry. Professionals are open to joining smaller or less recognisable companies, which is encouraging for startups and emerging businesses. Therefore, emphasising brand prestige during an interview may not be as effective as focusing on the attributes highlighted above, such as team dynamics, growth opportunities, and competitive compensation.

## Expert's opinion

Candidates are becoming more selective, focusing on factors beyond salary. Generation Z highly value **flexible work arrangements**, **latest technologies** to optimise and speed up work processes, and **comprehensive benefits packages**. Remote or hybrid work options have become a baseline expectation for many, particularly for younger candidates entering the workforce. Older, more experienced candidates are looking for **strong workplace cultures that emphasise well-being and sustainability**. Companies that invest in training, development, and upskilling are more likely to attract and retain such employees.

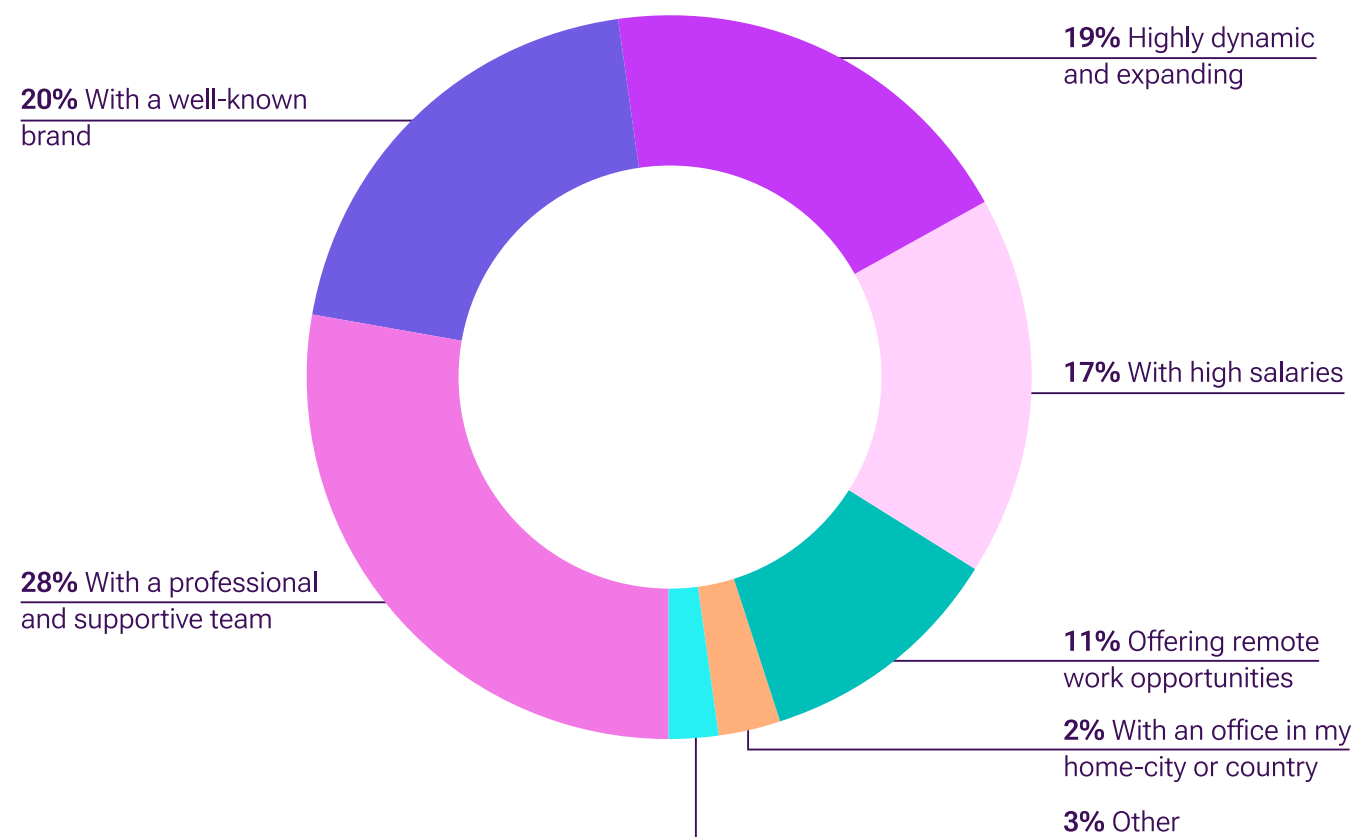
Daria Fot,  
HR Director at EvenBet Gaming





# Do CEOs Understand What Matters for their Employees Most?

CEOs' Vision of What Attracts Potential Candidates



As we can see, CEOs have successfully identified the top factor important to employees: 28% of respondents highlighted the value of a **Professional and supportive team**. However, their priorities diverge beyond this point and may need realignment. CEOs allocated 20% of their focus to both brand recognition and the company's dynamic nature, placing salary in fourth position with 17% of votes.

This approach could negatively impact interviews with high-value candidates. Even in companies with strong brand recognition, offering competitive salary remains essential. Moreover, it's crucial to highlight both the achievements and goals of specific departments and the organisation as a whole. By addressing these areas, companies can better position themselves to attract top talent while aligning leadership priorities with employee expectations.

# Is it Harder to Find Qualified Personnel in 2024?

## Expert's opinion

I wouldn't say that recruiting for Customer Success has become more difficult. There are enough specialists with extensive experience (such as support and account managers) in the market. The main challenge is teaching them how to work in the iGaming industry, as it's different from other businesses and requires specific knowledge. For instance, understanding the psychology and typology of players is essential. Additionally, the industry evolves rapidly, making regular training sessions for account managers and the support team necessary. Furthermore, working in the B2B segment demands an individual approach and a deeper understanding of the client's business. This is our focus.

**Ekaterina Nebogina,**  
Customer Success Director at EvenBet Gaming



## Expert's opinion

The competition for talent in the iGaming sector has significantly intensified in 2024. The global shortage of specialised professionals, particularly in technology, compliance, and sales, has driven demand and increased salaries. Additionally, compliance-related roles are in high demand due to rapidly evolving regulations in emerging markets.

Companies are increasingly exploring alternative hiring strategies, such as recruitment process outsourcing and building remote "augmented teams" to stay competitive. In addition to that, companies consider "hidden workers". This term refers to categories of workers who are typically overlooked by recruiters: retirees, people with disabilities, refugees and immigrants, as well as partners and spouses of relocators.

**Daria Fot,**  
HR Director at EvenBet Gaming



# What to Expect in 2025: Experts' Vision





# What to Expect in 2025: Experts' Vision

## Expert's opinion

As the only female poker tour owner and one of the few female managers worldwide, I've witnessed the **transformative impact of women** stepping into leadership roles within the gaming industry. The shift is not merely symbolic but a driver of innovation, inclusivity, and fresh perspectives in a traditionally male-dominated field. These new voices bring unique approaches to problem-solving and community engagement, fostering a more dynamic and balanced industry. It's an exciting time for women in gaming, and I'm proud to be part of this pivotal evolution.

Ivonne Montealegre,

Malta Poker Festival Founder, SiGMA Poker Tour Manager,  
Women in Gaming Founder



## Expert's opinion

**Marketing channels:** For vendors, public and company events will stay the key marketing channel, taking up ca. half of the marketing budget. However, the number of global and regional events has increased in the last few years. Therefore, many vendors start to believe that there are too many events with fewer operators showing up. Choosing the "right" events will become a tricky task in the future. Also, larger private company events seem to become more popular, enabling a more exclusive get-together between clients and leads.

**Regional marketing focus:** The regional marketing focus of vendors will see some changes in the future. Whereas the LatAm and African regions experienced a growing relevance, the US market became less relevant for many vendors. The US market is highly consolidated, with only a few operators active. Therefore, the right B2B approach in the US is direct sales to selected decision-makers instead of broad marketing campaigns or large stands at events.

Martin Oelbermann,

Director of Online Gambling Quarterly





# What to Expect in 2025: Experts' Vision



## Expert's opinion

I predict a few strong trends evolving in 2025:

**Adaptation to new regulations:** Companies must be flexible and prepared to respond quickly to changes in legislation to avoid fines and maintain licences.

**Investment in technology:** Implementation of new game mechanics, AI/ML, behaviour management can become a competitive advantage, improving user experience and increasing customer loyalty.

**Increasing competition:** It will be necessary to improve operational efficiency and control variable costs (providers, traffic) to remain competitive.

**Diversification of markets:** Expanding presence in new geographic markets with favourable regulations can reduce risks and ensure growth.

Dmitry Starostenkov,  
CEO of EvenBet Gaming



## Expert's opinion

The most active areas for development in the near future will be **personalisation and support for responsible gaming based on AI**. These are the areas where operators will be able to significantly increase their revenues without increasing the social burden of their games.

For multiplayer games, the main challenge in the near future will be **bots/assistants** and developing effective **methods of protection against them**.

Alexander Tamplon,  
CTO at EvenBet Gaming



## Expert's opinion

In 2025, I anticipate the following trends to emerge:

- 1. Talent Acquisition in Emerging Markets:** Companies will increasingly seek talent from emerging markets, such as Latin America and the UAE. This is particularly relevant in areas like compliance, localisation, and cultural understanding.
- 2. Growing Demand for Tech and Compliance Specialists:** As AI, machine learning, and blockchain technology become more integral to the iGaming industry, there will be a high demand for tech specialists. These professionals will enhance personalisation, improve player experiences, and ensure secure payment systems. Additionally, compliance experts will be crucial to navigate constantly changing legal standards.
- 3. Remote and Hybrid Work Options:** Flexible work arrangements have become essential for attracting and retaining talent. However, there is a trend toward reducing remote work offerings, with more companies focusing on hiring staff for on-site or hybrid roles.
- 4. Importance of Soft Skills:** Skills such as communication, problem-solving, and collaboration are vital for building strong teams and fostering positive work environments. These soft skills should complement technical expertise.
- 5. Emphasis on Diversity and Inclusion:** The iGaming industry, which remains largely male-dominated, is now more focused on attracting women and individuals from diverse backgrounds. There will be a noticeable increase in the number of women in IT and technical roles, alongside efforts to create a more inclusive workplace.
- 6. Focus on Retention Strategies:** In terms of rising competition for talent, companies will seek to prioritise retention by offering professional development opportunities, fostering inclusive workplace cultures, supporting family values, and investing in employee well-being programs, including mental health initiatives.
- 7. C-Level Talent Acquisition:** With a growing trend of expansion to emerging markets, there is a rising need to hire C-level talent from outside the industry.

Darya Fot,  
HR Director at EvenBet Gaming



# What to Expect in 2025: Experts' Vision

## Expert's opinion

- 1. Omni-channel marketing evolving into a central communication hub:** Brands will work tirelessly to capture users' attention across channels, creating seamless and consistent experiences on social media, email, websites, and more. Not only will this hub strengthen customer relationships but it will also make every touchpoint an opportunity for engagement and conversion. Marketing will shift from basic human-to-human outreach to full-on relationship-building.
- 2. AI and automation services:** AI will be at the forefront, driving hyper-personalised campaigns, predictive analytics, and account-based marketing (ABM). By automating repetitive tasks and refining customer targeting, AI will help businesses deliver more relevant and tailored experiences to their clients, enhancing efficiency without sacrificing quality.
- 3. Personal touch:** In the era of growing AI usage the personal touch will create loyalty. It's crucial to find the right balance between automation and human impact.
- 4. Thought leadership & educational content:** Will continue to be a cornerstone of B2B success. Whitepapers, webinars, and insightful blogs will establish authority and attract buyers who value innovative solutions. As we stand at the peak of the tribe culture, testimonials, ratings, influencer partnerships, and all forms of expert-driven content will reach their highest point of influence.

**5. Video and visual content** will dominate as the go-to tools for engagement, with live streams, product demos, and thought leadership videos making a greater impact thanks to affordable production tools and AI-powered personalisation.

However, as the dynamics of consumer behaviour shift, we'll likely see a new trend emerging by early 2026. It's essential to stay prepared and adaptable for what's next in the ever-changing world of B2B marketing.

Alexandra Voronetskaya,  
CMO at EvenBet Gaming



## Expert's opinion

I suppose several key trends are expected to shape customer experience in 2025. One significant trend is the **expansion into new markets**, which will require businesses to adapt their training materials, software, and employee training programs. Another trend is the **consolidation of clients**, as smaller companies increasingly seek to join larger networks. This shift is driven by the desire to simplify business management, as larger networks typically provide support and resources.

Ekaterina Nebogina,  
Customer Success Director at EvenBet Gaming



# What to Expect in 2025: Experts' Vision

## Expert's opinion

In my opinion, building a successful business in both emerging and traditional markets requires a tailored and thoughtful approach. I believe **localization** is absolutely critical since players need to feel that the experience is designed for them. This means **offering relevant, localized content, market-specific offers, and payment methods they trust** and are familiar with. Addressing language nuances, cultural preferences, and compliance with local regulations goes a long way in building trust and loyalty.

I also think **diversification of marketing channels** is essential. While affiliate traffic has traditionally been a go-to for operators, relying solely on it can be limiting. SEO, for instance, provides an incredible opportunity to drive direct traffic. By focusing on high-quality, human-written content that's relevant and engaging, operators can reach players more effectively and at scale.

In emerging markets, brands can enable **social media marketing** to run localized, culturally relevant campaigns. **Influencer marketing** also works well, as local influencers often hold significant sway.

**Programmatic advertising and display networks** help target broad audiences cost-effectively. **Localized partnerships**, such as with regional events or organizations, build brand visibility and credibility.

For both emerging and traditional markets, I believe the focus should remain on **constant optimization and innovation**, particularly in player funnels, retention strategies, and exploring new acquisition methods to stay ahead of competitors.

**Faruk Aydin,**  
Chief Revenue Officer, Revpanda Group & Revpanda Live Host





# Adapting to New Markets: 10 Best Practices for Implementation



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# Adapting to New Markets: 10 Best Practices for Implementation

Our research indicates that **expanding into emerging markets** is the top priority for many companies this year. This topic will continue to be important in 2025, so we've decided to share our checklist addressing this critical issue.

## Do Your Homework First—Conduct Research!

Before venturing into a new market, conducting thorough research in several key areas is crucial. Based on insights from iGaming experts and our own research, here are given important points to consider.



## 1. Regulation and Compliance

Explore the current regulations in the market and anticipate potential future developments. Establishing a presence before official legalisation can offer significant advantages. For example, when Brazil announced that companies could apply for licenses, approximately 80 companies were already operating in the market. These early entrants likely had an advantage over those that launched immediately after the announcement. Notably, the number of companies in the market doubled within four months after the bill was signed.

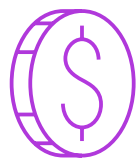
Keep in mind that there can be rapid growth once final decisions are made. When new companies rush into the market, you may encounter challenges such as a shortage of potential partners, limited office rental options, and difficulties in hiring employees.

# Adapting to New Markets: 10 Best Practices for Implementation



## 2. Marketing Restrictions Coverage

Be aware of any specific marketing restrictions in the target market. In Brazil, for example, campaigns promoting betting as a quick way to get rich are prohibited, as are promotions involving influencers linking gambling to financial success. Additionally, betting operators cannot offer bets on online games in physical establishments or through electronic devices.



## 3. Marketing Budget Evaluation

Establish the suitable size of your marketing budget for the specific country. Evaluate trends: will the marketing budget need to increase in the upcoming year? If so, by how much? Determine whether your company has a strong cash flow and a high average revenue per user (ARPU) in established regions to support your initiatives in the new market.



## 4. Local Culture & Habits Research; Hiring Locals

Tailouring marketing strategies to the local context requires a deep understanding of local insights. Partnering with local agencies can provide valuable research, but it's important to combine their findings with your own experiences for a more comprehensive perspective.

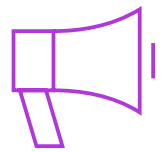
Consider hiring a cultural expert from your home country to help educate your team about the nuances of the new market. For example, when evaluating an app or product, user preferences can vary significantly. In some countries, users might rate the best product with lower scores (1–2), while in others, the top product receives the highest scores (9–10). Always involve local cultural experts to validate these insights.

Hiring local specialists in new territories who are genuinely invested in your company's success is essential. However, be wary of individuals who claim to be experts without the appropriate credentials.

Partnering with a local company can also aid in integrating locals into your team. Often, such a partnership with the local gaming company is required by the regulation rules.

Language plays a critical role; simply translating materials is insufficient, as dialects can differ greatly. For instance, Spanish varies across regions such as Mexico, Argentina, and Spain. It is crucial to involve local personnel to validate any localised materials, whether for marketing or product modifications.

# Adapting to New Markets: 10 Best Practices for Implementation



## 5. Marketing Channels

Identify which communication channels are most effective in the specific market. In some African countries, for instance, advertising may effectively reach consumers when placed on homes along busy roads. In Colombia, people often prefer to receive communications via WhatsApp. Additionally, when participating in global exhibitions, understand which presentation formats will resonate best, whether digital presentations or printed brochures.



## 6. Competition

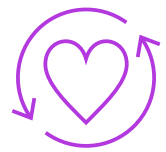
Identify the main competitors in the market along with their expected investment levels. Assess whether your company can effectively compete against their budgets. A notable example is the U.S. market; as legalisation progressed state by state, multiple operators entered the fray, believing that there would be space for everyone. However, reality proved different, with three companies dominating approximately 80% of the market while the remaining businesses shared the rest. Due to tax compliance issues in various states, many entrants abandoned what seemed like a lucrative opportunity.



## 7. Brand Strategy

Determine which brand name will sound pleasant and relevant in the new market. Research whether your existing name is appealing locally; you may spend significant money on advertising a brand that inadvertently has negative connotations in the local culture. Consider creating a unique brand identity for the new market. A clear and relatable brand, like BetMGM for Americans, enhances brand recognition and reputation.

# Adapting to New Markets: 10 Best Practices for Implementation



## 8. Product Adoption

Operators should aim for a fully customisable product from a reliable provider with a flexible layout that can be adjusted quickly. Consider the following points for product adaptation:

**Target Audience:** Identify the demographics (e.g., male/female, recreational players vs. regular players).

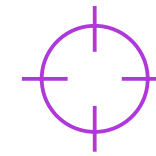
**Preferred Colours:** Be mindful of colour preferences in the target country.

**Popular Games:** Recognise that different markets may have varying preferences for games, even with the same providers.

**Language Used in the App:** Every term is significant, so localisation is critical. Each term used in the app should be confirmed by the local user.

**Payment Preferences:** Payment methods can vary greatly; for instance, in São Paulo, Brazil, card payments are more common than cash, while in San Diego–Tijuana, Mexico, a cashless environment prevails.

**Commitment to Responsible Gaming:** Often, to be fully compliant, platforms are required to monitor consumer habits and provide transparency tools to ensure responsible gaming.



## 9. Building Long-term Strategy

Focus on the long-term vision, as you may not get revenue for the first few years. The waiting period can range from two to five years. Instead of seeking quick profits, prioritise building long-term relationships with your players and earning their trust.



## 10. Customer Support Adoption

To build trust among local players, it's essential to establish a robust support infrastructure. In some cases, this may include physical retail stores and dedicated phone lines. In certain emerging markets, having a physical presence can be vital for instilling confidence. Bright examples are countries of Latin America and Africa. Evaluate whether digital support will be sufficient and identify the most effective communication channels for customers in that market, such as email and WhatsApp.

By addressing these ten factors, companies have a chance to successfully adapt to new markets and become successful.



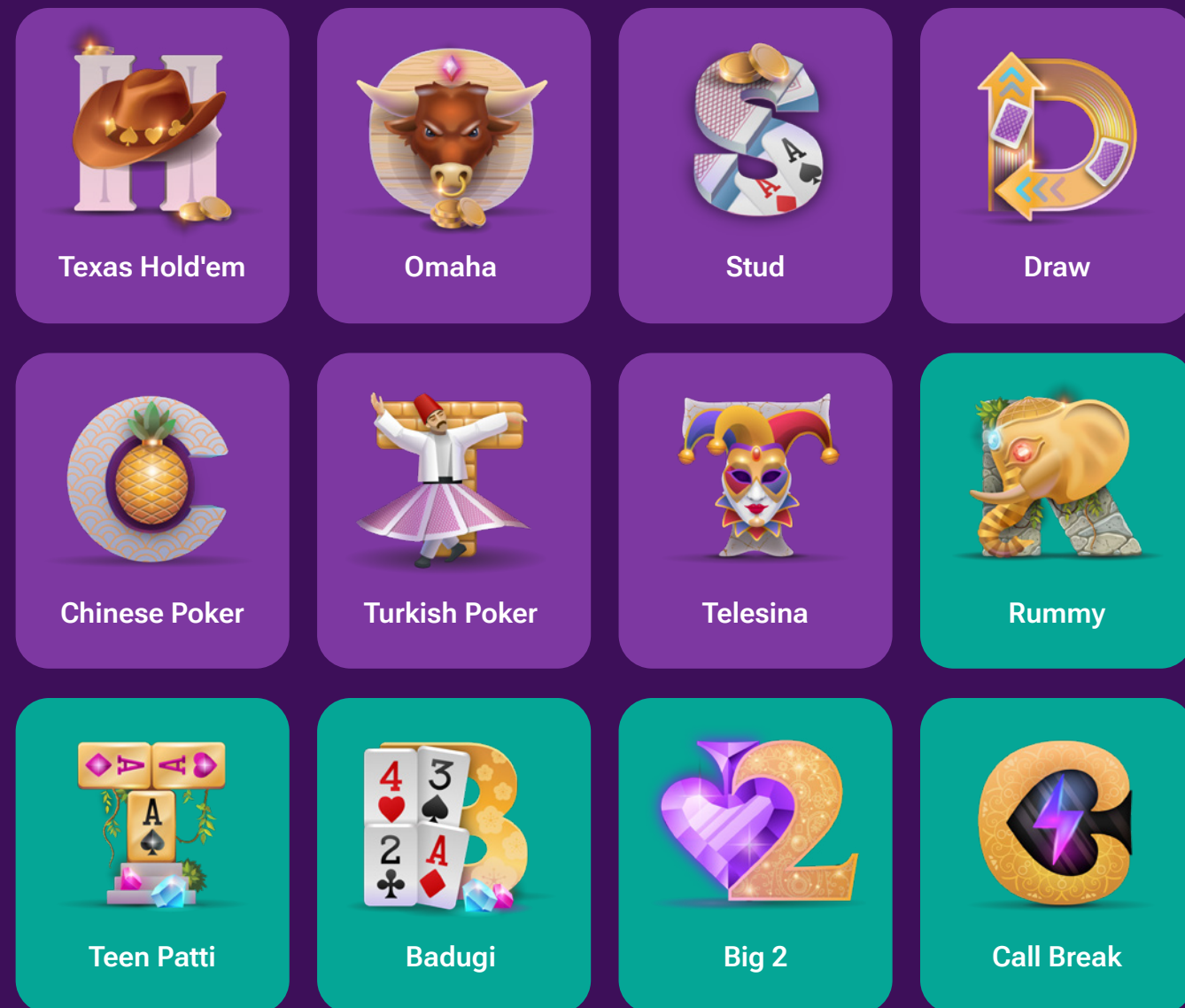


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PR & Marketing  
[pr@evenbetgaming.com](mailto:pr@evenbetgaming.com)

