

Presented by
SCCG ASIA



GAMBLING IN ASIA

20
23



GENERAL REPORT

This report explores the size and growth of the casino games segment in Asia, as well as the opportunities and challenges that it presents.



MARKET SIZE

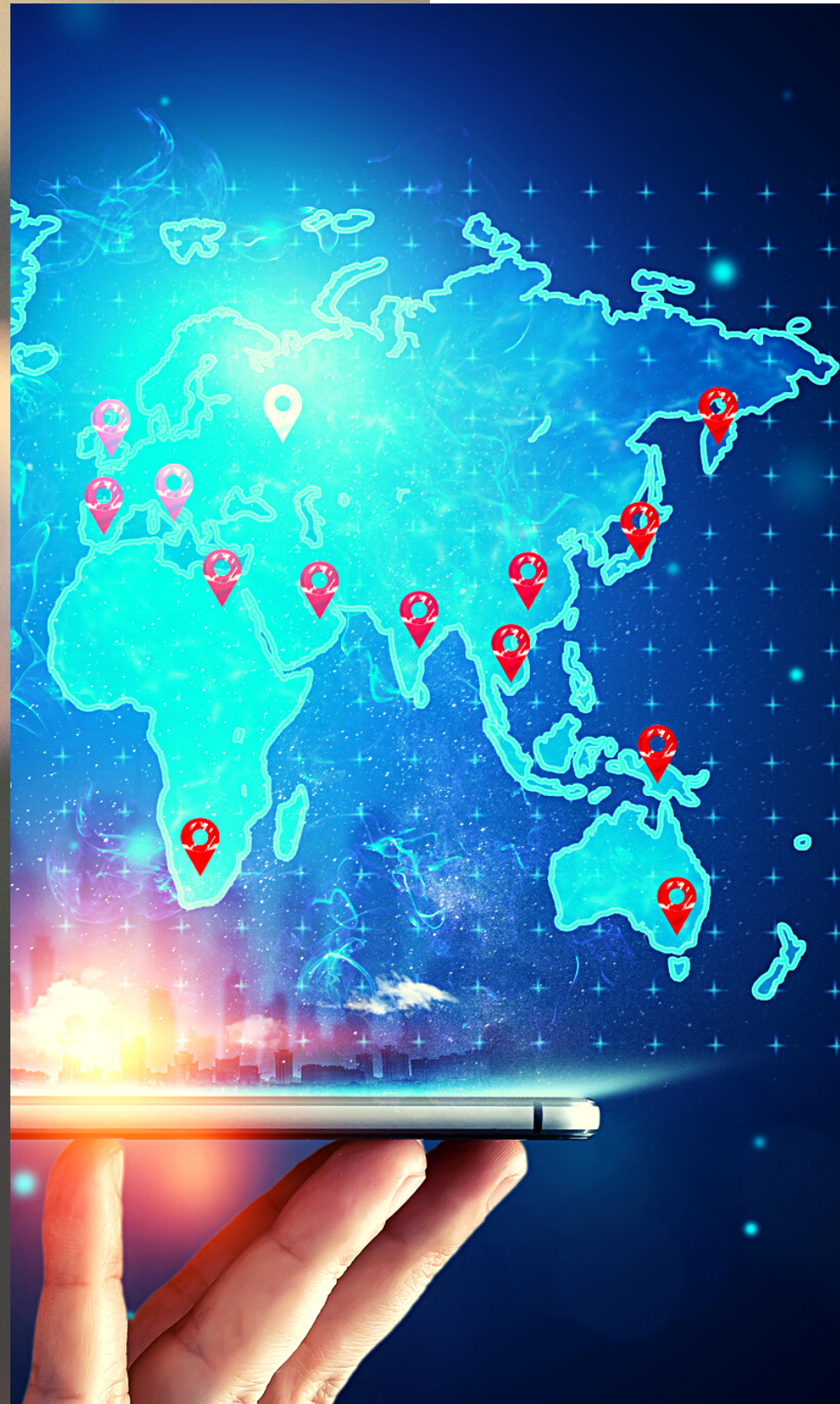


The Asia Pacific online gambling market size reached US\$ 19.5 Billion in 2022 and is expected to reach US\$ 37.5 Billion by 2028, exhibiting a CAGR of 11.39%. Additionally, the Asia Pacific Online Gambling Market size crossed USD 15 billion in 2019 and is anticipated to showcase around 18% growth rate between 2020 and 2026



ENGAGEMENT

As many as 40 million Singaporeans, Malaysians, Vietnamese, Indonesians, Filipinos, and Thais went online for gambling activities in 2022, according to data from e-Conomy. This indicates that the casino games segment in Asia is highly engaged, with a large and growing audience.



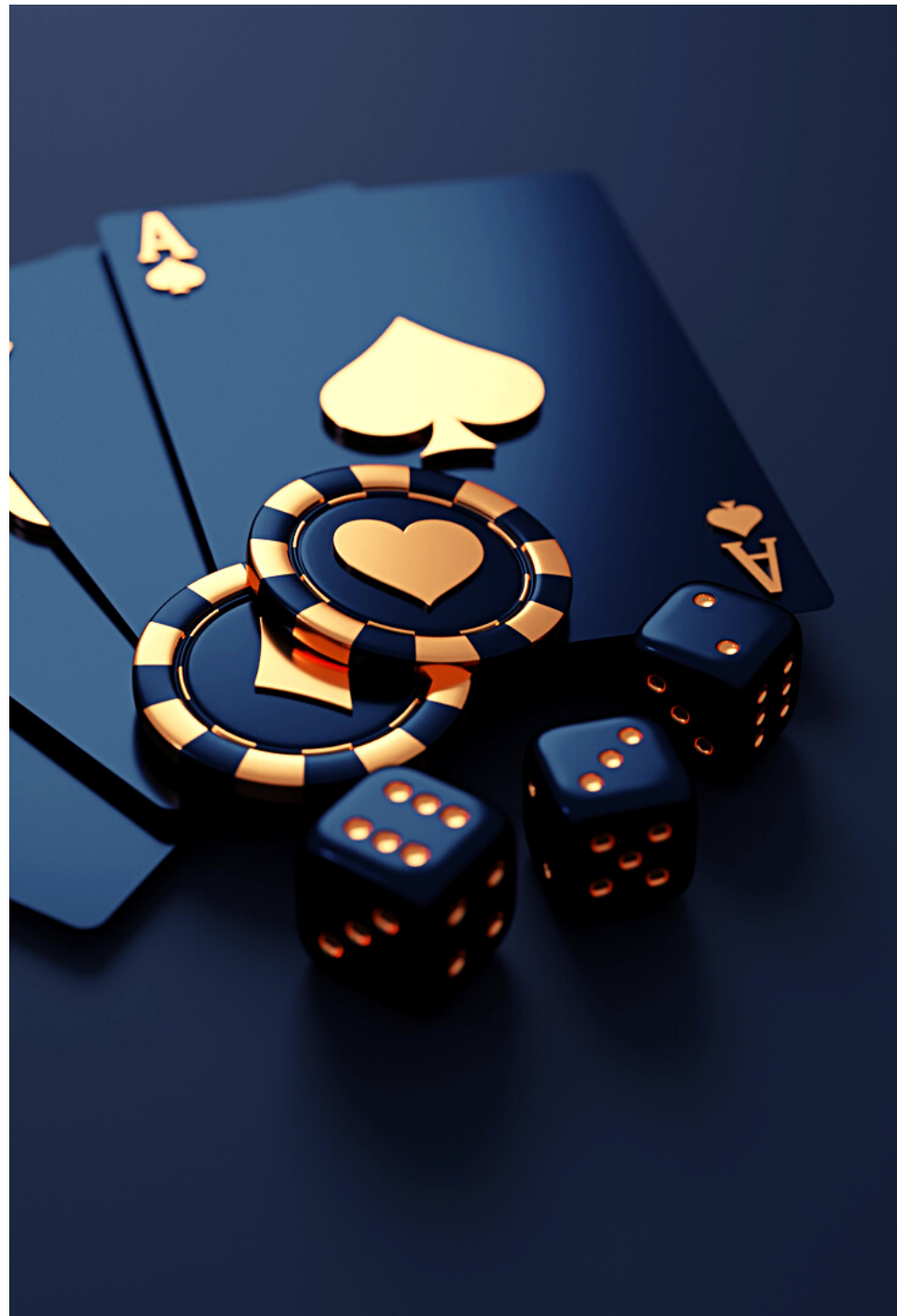


ONLINE SPORTS BETTING

Online sports betting growth in Asia in the coming years is estimated to be around 30.0%, with a CAGR of 12.6% from 2022 to 2030. This ties directly into the high percentage of young population throughout Asia, the improvement of digital infrastructure through investment and penetration of connected devices. Also, cashless payment methods and the growth in female casino customers are expected to boost the market, as well as virtual reality and blockchain technologies.



OPPORTUNITY



The casino games segment in Asia presents a growth market. Improved access and improved sector quality is a major plus as well as a youthful population mix, digital transformation and infrastructure investment and the global device connectivity is seeing this industry rapidly grow. Operators are starting to realise Asia's potential and that till now, Asia still remains untapped.

Despite the potential for growth, there are still some challenges that need to be addressed in order to maximize the potential of the casino games segment in Asia. These include the need for continued infrastructure, continued investment in the sector, and better regulation. Additionally, there is a need for education with the public about casino games and its potential benefits.

GROWTH MARKETS



The growth markets in Asia for gambling are India, the South East, and the Philippines. These countries are all experiencing significant growth due to a combination of digitally mobile users, easier access to smartphones and the internet, and a new generation who are looking for digital and on-demand entertainment.

Sports betting also remains popular in line with other regions, in particular soccer, horse racing, and US sporting events such as NFL and NBL. Video slots make up another large percentage of the market share, and eSports in South East Asia is growing faster than anywhere else in the world. Helping company's monetize in esports will be a major opportunity.



SCCG'S ASIA

SCCG Management is a premier management advisory firm with experienced leaders from the global gaming industry, providing expert solutions for strategic success with a focus on iGaming, Sports Betting, E-Sports and Casino Technology. Serving as a global networking partner for over 30 years with international offices in Europe, Africa, Asia, South America and Latin America, SCCG connects clients with the right strategic partners to assist global scale growth. As an accelerator for early stage companies, we promote innovation and empower emerging companies to achieve their goals. Additionally, SCCG acts as an early-stage investor, providing capital and resources to entrepreneurs developing new and innovative products and platforms.

SCCG ASIA combines global industry knowledge and expertise with the rich cultural diversity of Asia, to provide an unparalleled single point of excellence for the casino, sports betting and iGaming companies in the region. Operating out of Bangkok, Thailand as our hub, we are strategically positioned to effectively serve the entire Asian market.

