



A Study on Marketing Environment with Reference to Betting Apps in India

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Abstract – This study explores the burgeoning online betting app market in India, highlighting its rapid expansion fueled by increased smartphone usage, widespread internet access, and the integration of digital payment systems like UPI. The rise of fantasy sports and real-money gaming platforms has transformed the way Indian users engage with sports and mobile entertainment. The research delves into the intricate regulatory environment, marked by central and state-level legal complexities, evolving definitions of "games of skill" versus "games of chance," and advertising restrictions that pose significant challenges to market Players. The study emphasizes the growing need for localization strategies, including support for regional languages, cultural relevance, and sport-specific targeting—especially cricket, which remains the dominant sport influencing user engagement. Using strategic marketing frameworks such as PESTLE and 5Cs analysis, the research examines how betting and fantasy platforms deploy aggressive promotions, influencer marketing, and intuitive app design to attract and retain users in a highly competitive environment. Through secondary data analysis, the project identifies key trends in user behavior, regulatory shifts, and market dynamics. It concludes that while the Indian betting app market holds substantial growth potential, long-term success depends on how well platforms navigate legal uncertainties, build consumer trust, and adopt responsible marketing practices tailored to the Indian audience. The findings offer valuable insights for marketers, app developers, and policy-makers interested in the evolving landscape of digital gaming and betting in India.

Keywords - Marketing Environment; Betting Apps; Online Betting; Digital Marketing; Consumer Behaviour; Sports Betting; Mobile Applications; Marketing Strategy; Competitive Environment; Regulatory Environment; Customer Engagement; Brand Awareness; Online Gambling; Indian Market; Digital Consumerism.

I. INTRODUCTION

India's entertainment and leisure landscape is undergoing a profound shift, significantly propelled by the widespread adoption of smartphones and burgeoning internet accessibility. This digital wave has enabled the rise of numerous online services, prominently including the rapidly expanding market for betting applications. Traditionally confined to physical outlets or informal networks, betting has now carved out a substantial digital niche, offering convenience and accessibility to millions. The Indian online gambling market, estimated at USD 2.9 billion in 2024 (with some reports citing figures up to USD 6.91 billion depending on scope), is projected to experience robust growth, potentially reaching USD 5.7 billion to USD 16.83 billion by 2033, reflecting a strong Compound Annual Growth Rate (CAGR) around 7-8%.

Within this dynamic market, online sports betting, particularly focused on cricket, holds a dominant position. This rapid expansion, however, is intertwined with complexity. The marketing environment for betting apps in India is a confluence of technological leaps, evolving consumer tastes, intense regulatory scrutiny (including advertising restrictions and actions against specific apps), and fierce competition. Understanding this multifaceted ecosystem is paramount for operators seeking to harness the market's potential while adeptly managing its inherent risks. This study undertakes a comprehensive analysis of

this environment, illuminating the key trends, challenges, and opportunities defining India's betting app industry.

In recent years, betting apps and fantasy sports platforms have rapidly grown in India, especially during major cricket events like the IPL and World Cup. These platforms use digital marketing, celebrity endorsements, and referral campaigns to attract users, particularly among young adults. However, marketing in this sector is highly influenced by legal restrictions, public perception, and state-wise regulations.

This project focuses on analyzing the marketing environment around betting apps in India by examining both micro and macro factors such as consumer behavior, government policies, technology, and social trends. The study aims to provide insights into how these apps operate in a legally sensitive and competitive digital market.

Need of the Study

India's online betting market is experiencing rapid growth, driven by increased smartphone usage, widespread internet access, and the integration of digital payment systems like UPI. However, this expansion occurs within a complex regulatory environment characterized by varying state-level laws and advertising restrictions. The study is essential to understand how betting apps navigate these challenges while leveraging localization strategies, such as offering regional language support and catering to popular



sports like cricket, to engage the Indian user base effectively. By analyzing marketing frameworks and competitive tactics, the study aims to provide insights into sustainable growth strategies within this dynamic sector.

Scope of the Study

This study focuses on the marketing strategies of online betting applications operating in India, emphasizing the period of significant digital transformation and regulatory evolution. It examines key aspects such as market size and growth, user behavior, localization efforts, payment integration, and promotional activities. The research

encompasses both international and domestic players, analyzing how they tailor their offerings to meet the preferences of the Indian audience. Additionally, the study considers the impact of legal frameworks and enforcement actions on marketing practices, providing a comprehensive overview of the opportunities and challenges within India's online betting ecosystem.

II. LITERATURE SURVEY

Author(s)	Year	Title	Key Findings	Methodology	Relevance to Study
Kanchan Srivastava	2024	Indian Apps Rule Fantasy Sports World, Betting Too	Indian apps dominate global fantasy sports downloads; 19.4 lakh new betting app downloads in 2023.	Market analysis using app download and consumer spend data	Highlights growth and popularity of Indian betting apps.
IMARC Group	2024	India Sports Betting Market Size, Trends and Forecast 2033	Market at USD 6.91 Billion in 2024; projected USD 16.83 Billion by 2033.	Market research and forecasting	Provides insights into market size and growth trends.
PSU Connect	2025	The Future of Sports Betting in India: 2025 Market Trends and Innovations	Mobile betting >80%; integration of AI and blockchain; evolving regulations.	Industry analysis and trend observation	Covers tech and regulatory trends impacting marketing.
Kajetan Sawicz	2024	Surge in Sports Betting Apps in India Despite Regulatory Bans	Despite bans, 19.4M downloads; fantasy sports expenditures rose to \$120,000 in 2023.	Market observation and regulatory review	Reveals regulatory challenges and market resilience.
SMEStreet	2025	Online Betting in India: Trends & Innovation	Market at \$1.5B in 2023 with 40% YoY growth; 85% users aged 21-45.	Industry trend analysis	Details demographics and localization strategies.
Ken Research Pvt Ltd	2023	Online Gambling Market in India Experiences Strong Growth	Growth via internet & smartphone adoption; legal/cultural challenges.	Consumer behavior analysis	Insight on behavior and legal context.
Countercurrents.org	2023	Online Betting Apps in India: A Growing Concern	Celebrity endorsements boost popularity; major youth/family impact.	Social impact analysis	Explores ethical/social issues for responsible marketing.
6Wresearch	2024	India Online Sports Betting Market (2025-	Covers growth, segmentation	Market research report	Useful for segment-



		2031)	(mobile/desktop); forecasts trends.		specific marketing.
Think Change Forum (TCF)	2025	Industry Prepares for Boom During IPL 2025	140M regular bettors, 370M during IPL; \$100B inflow projected.	Industry report and projections	Highlights seasonal IPL-driven spikes.
Aayush Chaudhary	2024	Assessing the Impact of Upselling in Online Fantasy Sports	Increased upselling intensity improves user deposit metrics but diminishes user satisfaction and conversion rates; personalized upselling intensity levels can optimize trade-offs.	Experimental framework and counterfactual analysis	Provides insights into user behavior and marketing strategies in fantasy sports platforms.
René M. Galekwa et al.	2024	A Systematic Review of Machine Learning in Sports Betting: Techniques, Challenges, and Future Directions	Machine learning enhances prediction accuracy, dynamic odds-setting, and risk management; challenges include data quality and ethical concerns.	Systematic literature review	Highlights the role of advanced technologies in optimizing sports betting operations.

Objectives of the Study

- To understand the concept of marketing environment and how it applies to digital platforms like betting apps.
- To analyze the macro and micro environmental factors (using PESTLE and 5Cs analysis) affecting the growth of betting apps in India.
- To examine how betting apps use marketing strategies to attract and retain users in a competitive market.

III. RESEARCH METHODOLOGY

1. Research Design

The study adopts a mixed-methods approach, integrating both qualitative and quantitative research methods to provide a comprehensive analysis of India's online betting app market. This design facilitates an in-depth understanding of market dynamics, consumer behavior, and regulatory challenges.

2. Data Collection Methods

- Secondary Research: Extensive review of existing literature, including market reports from IMARC and Statista, regulatory documents, app reviews, and news articles, to gather data on market size, growth trends, and legal frameworks.
- Primary Research (Simulated Insights): While direct primary data collection was not conducted, the

study simulates user preference data based on secondary sources to analyze consumer behavior and preferences.

3. Tools Used:

Pestle Analysis:

Political Factors

- **Regulatory Complexity:** Betting laws in India vary by state. While states like Goa and Sikkim have legalized certain forms of betting, others like Telangana and Andhra Pradesh have imposed bans. This fragmented legal landscape poses challenges for betting app operators.
- **Government Oversight:** The central government's stance on online betting remains cautious, with discussions ongoing about establishing a unified regulatory framework.

Economic Factors

- **Market Growth:** India's online gambling market was estimated at USD 2.9 billion in 2024, with projections suggesting growth to USD 5.7 billion by 2033. This growth is fueled by increasing internet penetration and smartphone usage.
- **Taxation Impact:** The imposition of a 28% GST on betting activities has led to a 20-25% reduction in industry revenue, affecting profitability and user participation.



Social Factors

- **Demographic Engagement:** A significant portion of the Indian population, especially millennials, are engaging with betting apps, primarily for sports like cricket.
- **Responsible Gaming Concerns:** There are rising concerns about gambling addiction and its societal impact, prompting calls for responsible gaming measures and awareness campaigns.

Technological Factors

- **Digital Infrastructure:** India's robust digital infrastructure, characterized by widespread smartphone adoption and high-speed internet, facilitates the growth of mobile betting apps.
- **Payment Systems:** The prevalence of digital payment platforms like UPI enhances user convenience, making transactions seamless for betting app users.

Legal Factors

- **Ambiguous Legality:** The Public Gambling Act of 1867 doesn't explicitly address online betting, leading to legal ambiguities. Some courts have distinguished between games of skill and chance, affecting the classification of certain betting activities.
- **Advertising Regulations:** The Advertising Standards Council of India (ASCI) has set guidelines for fantasy gaming ads, emphasizing disclaimers and prohibiting misleading promotions.

Environmental Factors

- **Digital Consumption:** While betting apps have a minimal direct environmental footprint, the broader digital consumption contributes to energy usage and electronic waste.
- **Sustainability Initiatives:** There's an emerging trend among tech companies, including betting platforms, to



adopt sustainable practices, such as promoting digital well-being and responsible usage.

Secondary Research

- **Market Reports & Industry Analysis:** Comprehensive review of published market research from firms like IMARC Group, Spherical Insights, and Statista to gather data on market size, growth forecasts (e.g., CAGR ~7.1%-7.8%), segmentation (by sport, device), and prevailing trends.
- **Regulatory Documents & News Media:** Analysis of government advisories, legal statutes (where applicable), official press releases, and reputable news reports concerning online gambling, betting regulations, advertising restrictions, and enforcement actions in India.
- **Academic Literature & Expert Articles:** Review of relevant scholarly articles and expert commentary on online gambling, digital marketing, consumer behavior, and regulatory policy within the Indian context.
- **Company & App Analysis:** Examination of websites, mobile applications (features, UI/UX), marketing materials, and user reviews of prominent betting apps operating in or targeting the Indian market (e.g., 365BET, Dream11, MPL, Parimatch, Rajabet, 1xBet).

Market Profile: India's Online Betting Ecosystem Size, Growth, and Key Players

Market Size & Growth

- **Market Valuation:** In 2024, India's sports betting market was valued at **USD 6.91 billion**. Projections estimate it will reach **USD 16.83 billion by 2033**, growing at a **CAGR of 7.1%** from 2025 to 2033.
- **User Base:** The number of users engaged in online sports betting is expected to rise to **18.1 million by 2028**, with user penetration increasing from **1.0% in 2024 to 1.2% by 2028**.

Driving Factors:

- Widespread **3G/4G connectivity**, with 95.15% of villages connected as of April 2024.
- A surge in **internet subscribers**, reaching 954.40 million in March 2024.
- The popularity of major sports leagues like the **Indian Premier League (IPL)** and international cricket tournaments.
- Advancements in **digital platforms**, offering real-time data, live streaming, and analytics.

Key Players in the Indian Market

International Operators:

- **Bet365:** A global leader with over 45 million users, offering a wide range of betting options.
- **Betway and 1xBet:** Prominent platforms providing diverse betting services to Indian users.



Domestic Platforms: Fantasy Sports Giants (with related engagement):

- **Dream11:** India's largest fantasy sports platform with over 200 million users as of October 2023.
- **My11Circle:** Operated by Games24x7, it has secured significant sponsorships, including partnerships with IPL teams.
- **Mobile Premier League (MPL):** Offers a variety of games, including fantasy sports, and reported revenues of \$104.63 million in FY23.
- **India-Focused/Localized Platforms:** Batery, Rajabets, MostBet, Parimatch.

These platforms typically differentiate themselves through bonuses, range of sports covered (cricket, football, kabaddi, increasingly esports), user interface quality, live betting features, and crucially, the integration of local payment methods (UPI, PayTM, PhonePe). However, the market operates within a complex and often ambiguous regulatory environment, with the central government issuing advisories against offshore betting sites and advertising, while gambling laws remain primarily a state subject, leading to inconsistencies across the country. Reports of significant traffic to potentially illegal or unregulated sites (over 1.6 billion visits in a three-month period cited in one source) highlight the scale and the challenges of regulation.

Mobile technology and seamless digital payments are central to the growth of online services, including betting apps, in markets like India.

IV. DATA ANALYSIS AND INTERPRETATION

Understanding the Numbers and Trends

Analyzing data from market reports and app characteristics reveals key patterns in the Indian betting app environment. Mobile betting is unequivocally dominant, with estimates suggesting over 85% of users prefer betting via apps due to convenience and accessibility. Promotional offers exert significant influence, reportedly impacting the betting frequency of around 70% of users. However, regulatory uncertainty remains a major concern for a large segment (approx. 65%) of the user base.

Marketing Strategies Used

- Celebrity endorsements (Virat Kohli for MPL, Sourav Ganguly for My11Circle)
- IPL sponsorships
- Referral programs, bonus points
- Push notifications during live matches
- Regional ads in local languages

Interpretation:

Marketing is highly event-driven. Fantasy apps leverage influencer marketing and legal "skill game" status to promote aggressively.

Legal & Regulatory Challenges

- Banned States: Telangana, Andhra Pradesh, Assam, Odisha
- Some states classify betting as illegal "games of chance"
- Supreme Court rulings favoring fantasy as "game of skill"
- Central guidelines pending on real-money gaming

Interpretation:

Apps must tailor marketing campaigns state-wise. Legal ambiguity forces platforms to focus more on fantasy than direct betting.

User Behavior Trends

- High app engagement during cricket matches
- Players prefer apps with easy withdrawal, bonus rewards
- Users return for big tournaments but drop off later
- Concern over addiction and over-spending

Interpretation:

Marketers must retain users with consistent value, loyalty programs, and responsible gaming features.

User Demographics

According to various reports:

- Major Age Group: 18–35 years
- Gender: ~80–85% male users
- Geography: High user base in Tier 2 & Tier 3 cities
- Device Preference: 95% users access via smartphones
- Key Events: Surge in users during IPL, World Cup, and football tournaments

Interpretation:

Betting apps target young, mobile-savvy users with a strong interest in cricket and fantasy sports. Regional language ads and mobile-friendly UI are crucial.

Findings:

The marketing environment refers to external and internal factors that influence an organization's ability to serve customers. This includes:

- **Micro Environment:** Direct influences like competitors, customers, partners, and suppliers.
- **Macro Environment:** Larger forces such as economic, technological, legal, and socio-cultural conditions.



In the context of **betting apps**:

- These platforms operate in a **dynamic and sensitive market**.
- Their success depends heavily on **user experience, technological ease, payment systems, and legal regulations**.
- Continuous tracking of consumer behavior and digital trends is crucial.

PESTLE Analysis (Macro Environment):

- **Political:** Betting is a grey area in India; laws vary by state. This uncertainty limits market expansion.
- **Economic:** Increased smartphone usage and digital payments create a strong base for betting apps.
- **Social:** Mixed public opinion – some see it as entertainment, others as addiction or unethical.
- **Technological:** Strong digital infrastructure (UPI, fast internet) supports rapid app usage.
- **Legal:** Most online betting is not officially regulated, causing operational risks.
- **Environmental:** No significant direct impact, but sustainability and data privacy are becoming important.

5Cs Analysis (Micro Environment):

- **Company:** Betting apps focus on innovation and seamless experience.
- **Customers:** Young, tech-savvy users, especially male-dominated demographics.
- **Competitors:** High competition from local and international platforms.
- **Collaborators:** Banks, payment gateways, tech developers are vital.
- **Context:** Digital India push and cashless economy are favorable trends, but legal grey zones are a hurdle.

Attracting Users

- Heavy use of **influencer marketing** and **ads on social media**.
- First-time bonuses, free credits, and cashback schemes.
- Referral programs and gamified experiences to hook users.

Retaining Users:

- Personalized content based on user behavior.
- Push notifications with match alerts and rewards.
- Loyalty programs, tier-based rewards, and instant withdrawals.

Overall Strategy

- Focus on **user engagement, brand loyalty, and easy-to-use UI/UX**.

- Regular updates and **24/7 customer support** help improve trust.

Suggestions

- **Prioritize Mobile UX & Performance:** Continuously optimize mobile apps (especially Android) for speed, stability, and intuitive navigation.
- **Deepen Localization Efforts:** Invest beyond just UPI integration; offer multiple regional languages for interfaces and customer support. Tailor promotions to local festivals or regional sports interests.
- **Build Trust and Transparency:** Clearly display licensing information (even if international). Be transparent about bonus T&Cs. Implement robust security protocols and communicate them effectively.
- **Embrace Responsible Gaming:** Proactively integrate tools like deposit limits, self-exclusion options, and reality checks. Market ethically, avoiding misleading claims or targeting vulnerable groups.
- **Diversify Offerings Strategically:** While maintaining a strong cricket focus, explore and promote markets in growing sports like esports and kabaddi.

For Regulators

- **Strive for Clarity and Consistency:** Develop clearer, more consistent regulations for online betting/gaming across states to reduce ambiguity and create a more predictable environment.
- **Consider a Licensing Framework:** Explore possibilities for a regulated licensing regime that allows legitimate operators while setting high standards for consumer protection, security, and responsible gaming.
- **Enhance Enforcement Against Illegal Operators:** Strengthen measures to curb unlicensed and illegal betting sites that pose greater risks to consumers.
- **Promote Responsible Gaming Awareness:** Launch public awareness campaigns about the risks of gambling addiction and promote resources for seeking help.
- **Engage with Industry Stakeholders:** Foster dialogue between regulators, operators, and consumer groups to develop balanced and effective policies.

For Users

- **Choose Reputable Apps:** Look for apps with clear information, positive reviews (from multiple sources), and responsive customer support. Be wary of apps making unrealistic promises.



- **Understand Terms & Conditions:** Read the rules carefully, especially regarding bonuses (wagering requirements) and withdrawal processes/limits.
- **Practice Responsible Gambling:** Set strict limits on time and money spent. Never bet more than you can afford to lose. Be aware of the signs of problem gambling and seek help if needed.
- **Prioritize Security:** Use strong, unique passwords and enable any available security features within the app. Be cautious about sharing personal information.

V. CONCLUSION

The marketing environment for betting apps in India is characterized by a potent mix of high growth potential and significant operational challenges. Driven by favorable digital trends and a sports-loving populace, the market offers immense opportunities. However, navigating the intricate web of regulations, intense competition, and the imperative of building user trust requires sophisticated and adaptive strategies. Success hinges on a deep understanding of the Indian consumer, particularly the demand for localized experiences and seamless mobile interactions. Operators must balance aggressive marketing with ethical considerations and a proactive approach to responsible gaming. As the market matures, those platforms that prioritize transparency, user security, localization, and regulatory adaptability are best positioned for sustainable growth in this dynamic and evolving ecosystem. Continuous monitoring and strategic agility will remain crucial for all stakeholders involved. To conclude, betting and fantasy sports apps in India have the potential to become a major force in the digital entertainment space. However, long-term success will depend not just on user acquisition, but also on how responsibly and legally these platforms operate. Brands that earn trust, follow compliance, and stay ahead of technological and legal changes will thrive — while others may struggle to survive in this competitive space. Continuous innovation, ethical conduct, and regulatory awareness will be the key pillars of future growth.

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