

Sports Betting & Gaming
Sponsorship Report

Excerpt

Sports Betting & Gaming Sponsorship Report

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Expertise by SPORT+MARKT AG

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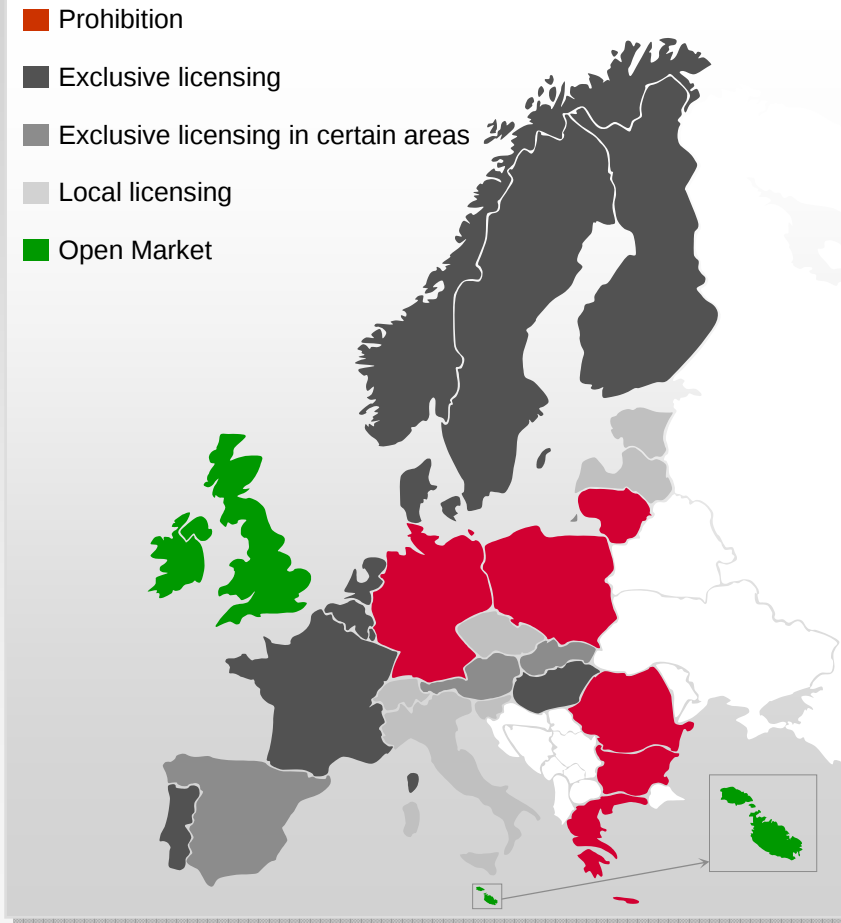
Introduction

- The sport betting and gaming market has been one of the most changing industries in recent years.
- In particular, the field of sports betting has been identified as a main market growth driver in recent years.
- Traditionally, major sporting events have boosted revenues in sports betting markets.
- Bookmakers in the U.K. were expecting the 2010 FIFA World Cup to be the biggest betting event ever in the country, with over GBP 1 bill. being wagered for the first time.
- Of course, this highly lucrative source of revenue has not gone unnoticed in other countries where the sports betting markets have yet to be liberalised.
- In addition, the vast amounts invested in sport sponsorship in the U.K. by gaming and betting companies are a welcome side effect of the market situation for sporting clubs and organisations in the country.
- As a result, organisations and clubs in other markets have long campaigned for comparable legal situations and benefits.
- Following a lengthy process, this eventually culminated with liberalisation of the French market on June 8th, 2010.
- The developments now occurring on the French market therefore serve as an indicator of the potential, which could be realised in other markets with the introduction of similar legislation.

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Pan-European legal situation

- With the onset of liberalisation in the French market, a further European territory has introduced exclusive licensing.
- Although some regulations in place still currently favour state providers PMU (horse racing) and Française de Jeux (sports betting and gaming), other providers will also be able to operate betting and gaming services in the country with licenses issued by ARJEL, the French authority for gaming.
- However, in other European markets (most notably, Germany), restrictions remain in place to protect the rights of state monopolies, as these are reliable sources of government income. Various licensing laws apply in other territories (such as Spain, Italy and Portugal) where governments issue licenses to providers at their own discretion.



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Top gaming companies as sport sponsors in Europe by investment 2009/2010*

Rank	Company	Approx. 2009 / 2010 sport sponsorship spend (in € p.a.)	Country of origin
1	bwin	30,000,000	Austria
2	Mansion	10,000,000	USA
3	Française des Jeux	9,500,000	France
4	BetClic	9,000,000	France
5	Lottomatica	8,000,000	Italy
6	188Bet	7,000,000	U.K.
7	Unibet	6,500,000	Sweden
8	12Bet.com	3,500,000	Philippines
9	PMU	3,500,000	France
10	Sisal Matchpoint	3,000,000	Italy

* Please note: Several new deals signed during the course of the 2009/2010 season, which will not take effect until the upcoming 2010/2011 season, have not been included in this ranking. Where required, figures have been estimated.



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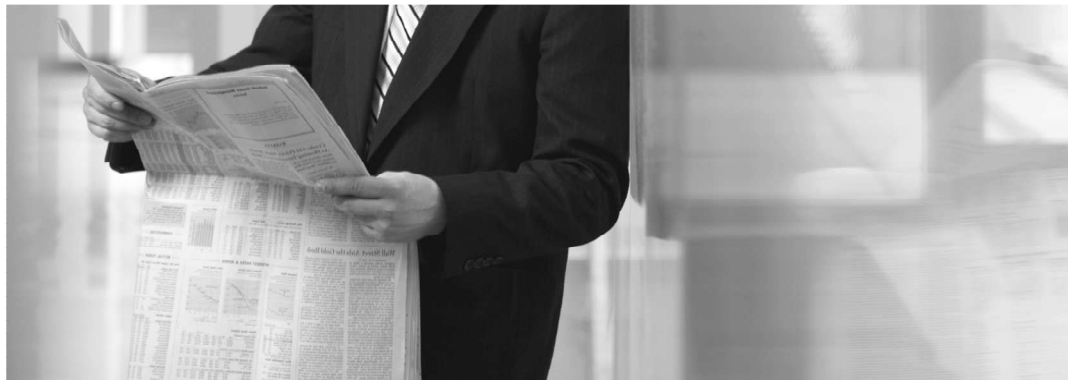
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In addition to expertise in market, media research and strategic consultancy, our clients have access to one of the most extensive global databases for sport, sponsorship and communications.

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