



Die Gewinnung von neuen Kunden - Potentiale für die Wettindustrie

/Nikolaus BEIER

/October 2021



Sportradar at a glance

About us

Driving deeper sports engagement worldwide

/15+ years in sports industry

/Comprehensive data coverage
worldwide

/400,000+ matches covered per year

/Specialists in over
60 sports

/1,000+ clients and partners

/3,000+ employees

/280,000+ matches monitored for integrity



"z": 6.35

"dir": 47.65





Sportradar

Company & Product Setup



Starker Österreich-Bezug:

- Büros in Linz & Wien
- 400 MitarbeiterInnen – höchst qualifiziert
- Größter Standort von SR (ex data coll.)

Sports Entertainment

Betting & Gaming

Sports Solutions

Products

- **Live Streaming** for Bookmakers („AV“); both online as well as for land-based Operators
- **Marketing Services** („Sportradar ad:s“)
- **Services** for (online) **Publishers & LAOLA1.at**
- **Online Streaming Platforms** („Sportradar OTT“)

- **Odds and Data Services** (PreMatch Odds, Live Odds, API Data, etc.)
- **Managed Trading Services** („MTS“)
- **Betting Entertainment Tools** (Widgets, Match Tracker, etc.)
- **Virtual Gaming** Solutions

- **Integrity Services** for Federations, Leagues and Clubs
- **Automated Production Services**
- **Web Services** for Sports Right Holders (Websites, Apps, CRM Systems, etc.)

Key Locations

- Vienna
- Munich
- London
- New York

- London
- Ljubljana
- Bremen
- Las Vegas
- *Data Collection: Minneapolis, Montevideo, Gera, Tallin, Manilla*

- New York
- Melbourne
- Vienna

Industry trends, conclusions,
why efficient user
acquisition is important and
what to do about it

Market Data

- **Global Sports Betting Market** is set to grow by **6,4% p.a. from 2022-2025**, growth rate from **2016-2019** was **7,55% p.a.**
- European **Total Sports Betting Market** is set to **grow by 5,0% p.a. from 2022-2025**, growth rate from 2016-2019 was **8,12% p.a.**
- **European Land Based Market** is expected to **grow below inflation** (i.e. 1,5%) from 2022 – 2025 after having grown by **4,75% p.a. from 2016 – 2019**
- Both **growth rates** of European Interactive Sports

Betting Market as well as Global Interactive Sports Betting Market **from 2022-2025 is expected to be below growth rates from 2016-2019** (7,0% vs. 12,3 in Europe; 8,6% vs. 11,9% globally)

- **Key Growth driver** in absolute numbers is **North America** where GGR from Sports Betting is expected to almost tripple from 2021 to 2025 (reaching almost USD 13 bn)

M&A

Have we reached the next level of sector consolidation?

Alun Bowden explores the implications of DraftKings' offer for Entain and which parties stand to benefit from a potential takeover

Alun Bowden | 07 October 2021

Save Email Print Share



If we thought we'd seen the end of the mega-mergers, the US market showed us we were very much mistaken. DraftKings' \$20bn bid for Entain sent shockwaves around the sector and would potentially set a new standard for scale in online gambling, as well as re-centre the balance of power firmly on the western edge...

BetMGM | DraftKings | Entain | FanDuel | Finance | Flutter Entertainment | M&A | Mom | Online gambling | Sports betting



GENIUS SPORTS FILES IPO STATEMENT WITH SEC

Ted Menmuir | January 18, 2021 | Europe, Latest News, North America, Sportsbook
Comments Off on Genius Sports files IPO statement with SEC

*<https://sportshandle.com/mergers-acquisitions-casino-betting-world/>, Lloyd Danzig, founder and managing partner of Sharp Alpha Advisor, a firm specializing in sports betting startups, technology, and M&A

*"The current product landscape is characterized by its high availability of substitute products and negative switching costs. M&A is the most efficient mechanism by which industry stakeholders can achieve vertical integration and product differentiation"**

CASINOBEATS

Buzzwords don't help you scale!

Home > News > Entain closes Bet.pt and Enlabs purchases to continue growth strategy

News Online

Entain closes Bet.pt and Enlabs purchases to continue growth strategy

April 1, 2021



Newsletters

Log In

Sportico

The Business of Sports

BUSINESS

LEAGUES

FINANCE

LAW

MEDIA

VALUATIONS

TECH

PERSONALITIES

EVENTS

HOME / BUSINESS / SPORTS BETTING

DRAFTKINGS MAKES TAKEOVER BID FOR ENTAIN

BY EBEN NOVY-WILLIAMS

September 21, 2021 10:26am

HOME / BUSINESS / FINANCE

BETWAY SPAC DEAL NEXT STEP IN WORLD BETTING BRANDING



BY BRENDAN COFFEY | June 15, 2021 5:55am



EVOLUTION TAKES FULL CONTROL OF NETENT

Erin-Marie Gallagher | December 2, 2020 | Europe, iGaming, Latest News
Comments Off on Evolution takes full control of NetEnt

TRIFECTA

DIRECTORY

Directory

Get Listed

About Us

Contact

News

Resources

BETTER COLLECTIVE CLOSING \$240M ACTION NETWORK ACQUISITION

News / Published 31 May 2021 / iGaming News

Better Collective has closed its \$240m acquisition of the Action Network, the largest deal in the super-affiliate's history.

The deal was announced at the start of this month. Of the \$240m price, the vast majority will be paid in cash, alongside \$11.4m in new Better Collective shares, issued at a price of SEK231.35 per share. Of the cash payment, \$10m is deferred.

"We are excited to finalize the acquisition of Action and to formally welcome its

BC

BETTER COLLECTIVE

Regulation & Licencing

New Markets going from black/grey to regulated

Constant changes in regulations in established markets



Key Market Trends

Ongoing Growth in Global Sports Betting Market – but slowing down

Sports Betting Business is further and further digitalized

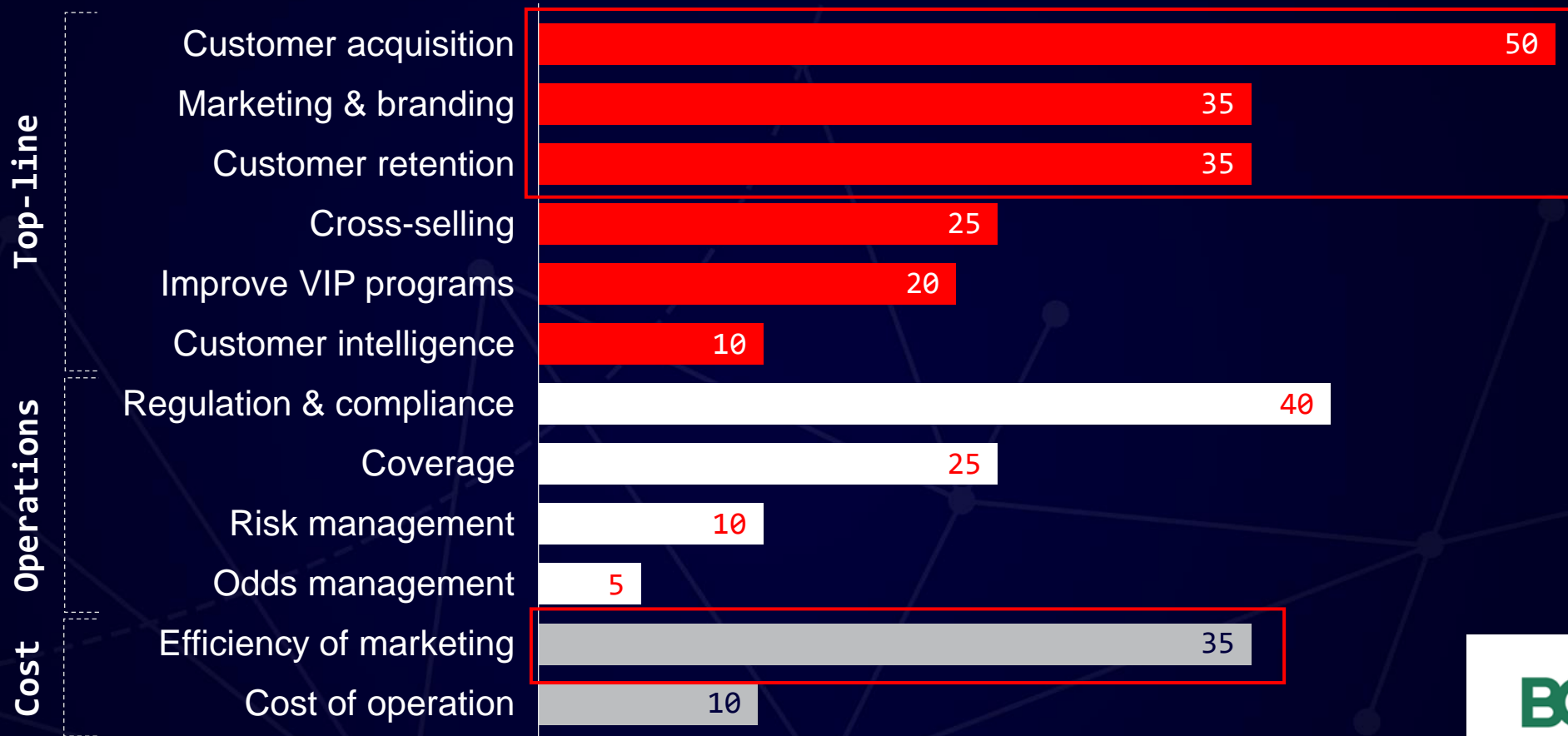
Further Licencing/Regulation Requirements in established Markets

New, large Markets opening up on a global basis

Further Market Consolidation through increased M&A & public market activities

Consequence:
Need for increased EFFICIENCY

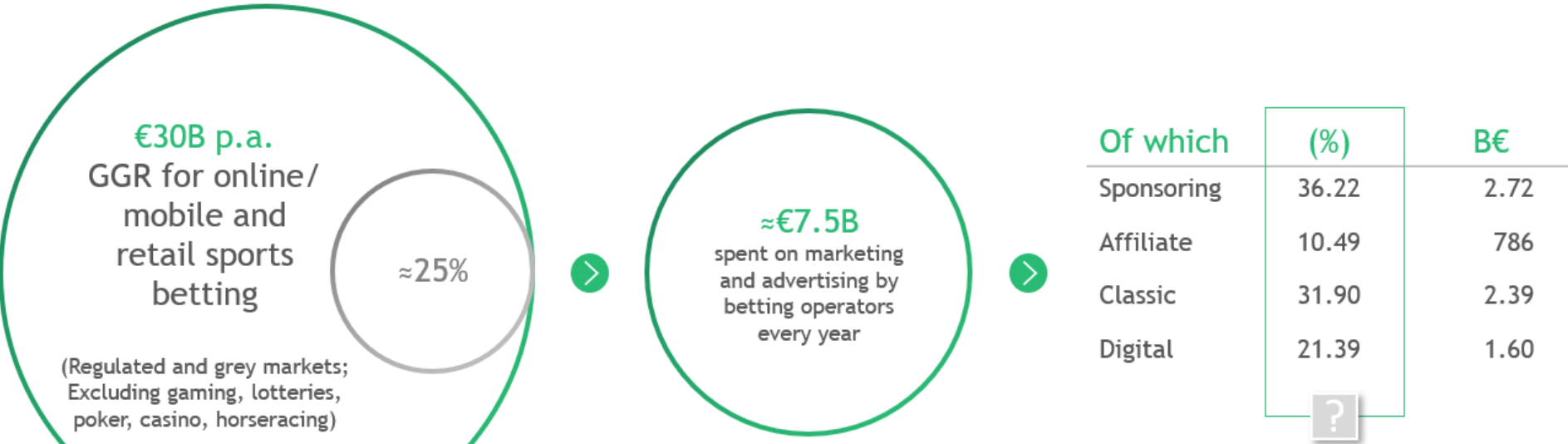
What are your top 3 priorities to improve your business?



(in % of respondents)

Global GGR advertising and marketing spent accounts for ~25% of different betting operators¹

II



Source: H2 Gambling Capital; BCG analysis

20

→ There is significant opportunity in optimizing digital marketing channels!

The Challenge – Solve „Attribution“



A user sees a billboard or watches TV and sees the ad of a sports betting company...



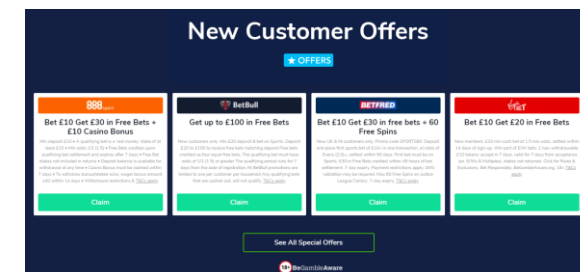
...he surfs the internet, is profiled as being male and sports interested and thus gets a sports betting video ad...



...he keeps on surfing and gets exposed to numerous formats of ad banners as we understand he is sports interested...



...because he likes what he sees, he searches Google for the best welcome bonus for the operator he has seen an ad for...

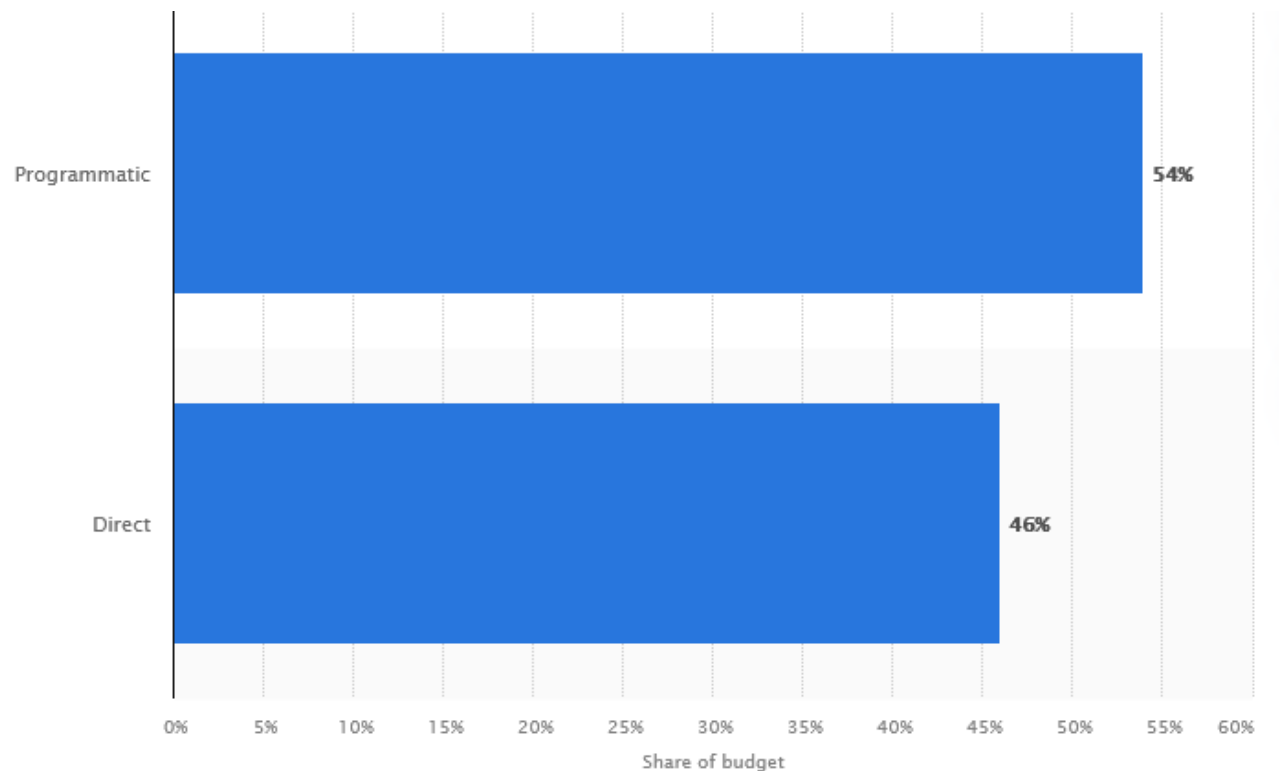


...through google he lands on an odds comparison website and clicks on the operators site as he gets an additional bonus there!

Now, who will be made „responsible“ for the „conversion“?

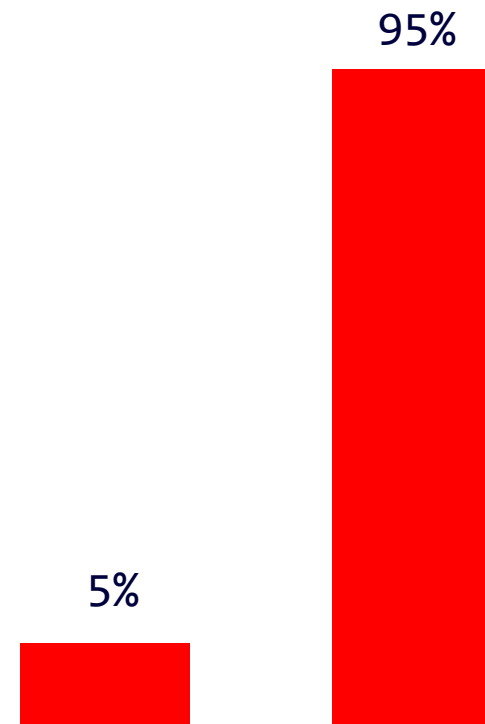
The Challenge – Buy Advertising Spaces data driven & efficiently

Digital Media Buying US 2021 by purchasing model:



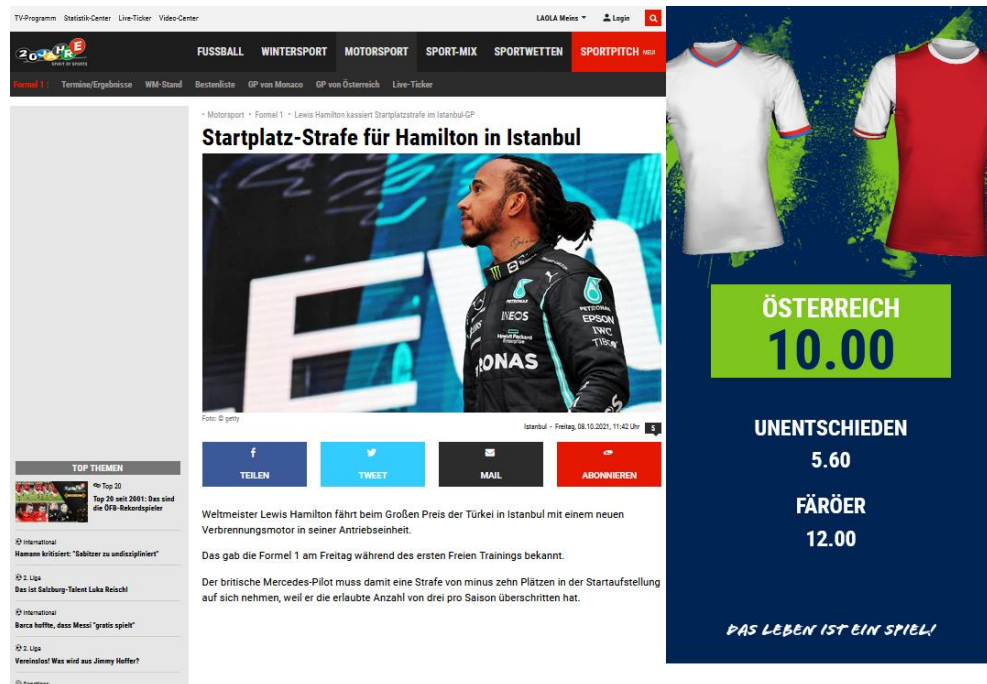
Source: Statista

Digital Media Buying in European Bookmaking Industry:



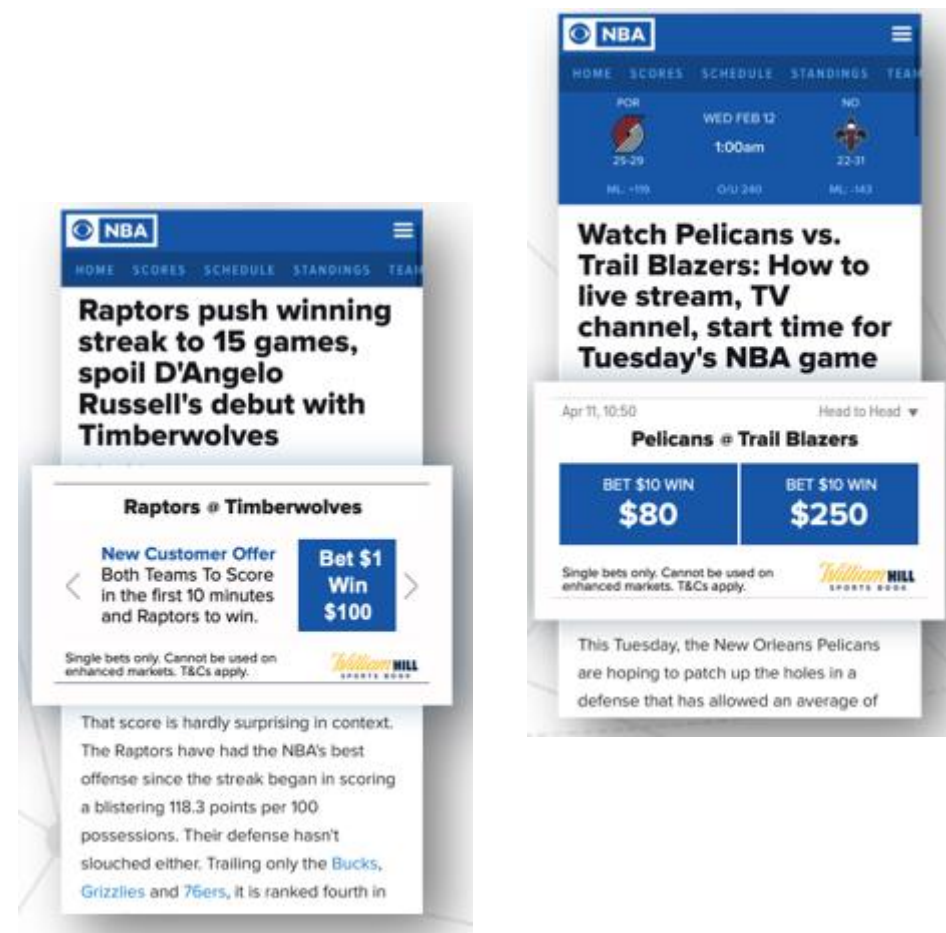
Source: Sportradar

The Challenge – Personalization



<https://www.laola1.at/de/red/motorsport/formel-1/news/lewis-hamilton-kassiert-startplatzstrafe-im-istanbul-gp/>

VS.



Increased interaction rate by up to 30%!

3 Things to take away

1. In **Marketing**, there is presumably the **biggest opportunity to increase efficiency**
2. In order to improve Marketing Efficiency, **understanding and measuring Attribution** in the right way is key
3. **Data based, automated acquisition of advertising spaces and increased personalization** can increase performance and thus efficiency significantly

sp**o**rt**radar**
ad:s

Thank you