

## The course is set for the liberalisation of the German sports betting market expected to grow to ca. Euro 1.5 billion by 2015

Thursday 3 May, 2012

London/Munich - The German states will soon enact the new Interstate Treaty on Gambling, which will liberalise the German sports betting market starting in 2012. Liberalisation in general always sounds good, but the question is whether it will turn into a success story in Germany. Therefore, the consulting and research company MECN has analysed the situation in depth and compiled the most comprehensive and detailed report on the German betting and gambling market available.

### Liberalising a giant gambling market

The discussion and legal disputes will surely continue in the coming months and years, but it seems that for the time being the final steps toward a liberalisation of the German betting market have been taken. Thus, a giant gambling market embarks on liberalisation with the support of a strong and growing economy. The figures regarding the size of the German market are impressive:

- Size matters with Euro 45 billion on the table - In 2011 Germans wagered (turnover) a total of nearly Euro 45 billion, and gross revenues topped Euro 10 billion.
- Sports betting estimated to grow to Euro 1.5 billion - Many operators have their sights on the soon-to-be liberalised sports betting sector, which is expected to grow to ca. Euro 1.5 billion in gross revenues by 2015 (+211% - CAGR 33%). The key growth driver will be the retail sports betting segment where ca. 2,500 new betting shops and countless new shop-in-shops/terminals are expected to open in the next few years.
- Online gambling is worth ca. Euro 1 billion and will grow to Euro 1.7 billion by 2015 - The grey online gambling market is estimated to be worth ca. Euro 1 billion (gross revenues), with online poker the biggest segment. MECN and surveyed operators expect that by 2015 the total online gambling market (licensed and unlicensed - betting, poker, casino, and lotteries) will grow to Euro 1.7 billion, with online lotteries driving this development.

But liberalisation alone does not automatically prompt applause - many issues still open. There are many open issues still to be resolved that will ultimately determine whether the liberalisation will be a success. Martin Oelbermann (co-author of the study) explains: Since the experience with France, liberalisation alone no longer automatically prompts applause. Aside from taxes, operators are also concerned about other regulations, such as advertising restrictions, online identification processes, IT systems, ... that will be imposed. Many of these regulations require in-depth analyses, and in many cases the details have not yet been specified by the regulators. A key question is also whether the license issued by Germany's northern state of Schleswig-Holstein, which has enacted separate, more liberal regulations (also liberalising online poker and casino, lower taxes, ...), will be valid throughout Germany.

### MECN's new report - The German betting and gambling market

The increased complexity of the market has also led to increased demands on market research and analyses. Therefore, MECN spent several months compiling the most comprehensive, detailed, and objective report on the German betting and gambling market. Among other topics, it covers the following issues:

- Liberalisation on the federal/national level - Up-to-date and in-depth information and analysis regarding the ongoing federal liberalisation (new Interstate Treaty on Gambling), including detailed explanations of regulations (e.g., taxes, ...).
- Schleswig-Holstein licenses - Comprehensive and authoritative analysis of the liberalisation in the German state of Schleswig-Holstein. This includes in particular a discussion of the relevance of this license for any nationwide offers in Germany.
- 2011 market figures - In-depth assessment of market sizes up to 2011. In particular, the report focuses on the retail and online sports betting market.
- Forecasts up to 2015 - Detailed forecasts (to 2015) for all online gambling segments as well as for the retail sports betting market.
- Analyses of operators' strategies - Analyses of operators' strategic plans for Germany, including the current and future relevant online and retail players, ...
- Unique insights through a survey of market insiders - Many analyses are based on the results and unique insights we gathered from our extensive survey of German market insiders and operators.

The study can be obtained at [www.germany-gambling.mecn.net](http://www.germany-gambling.mecn.net)

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MECN is a network of experts on issues concerning the media and entertainment industry. Together they provide in-depth knowledge, analysis, and advice to global clients.

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