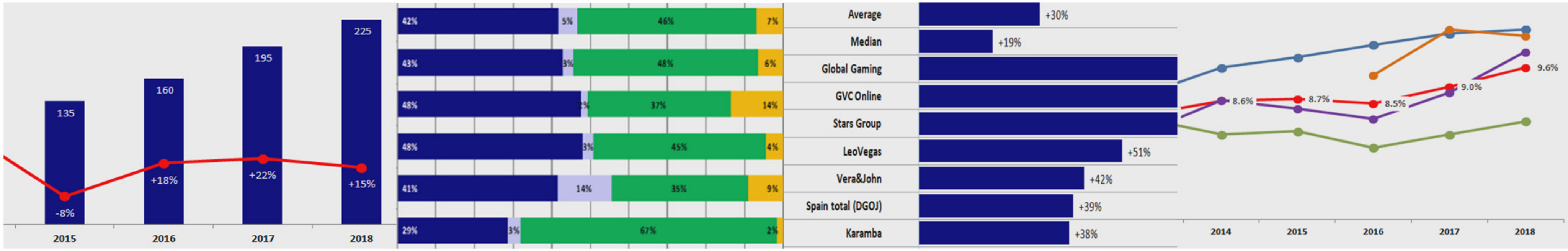


MECN
Media & Entertainment Consulting Network

Online Gambling Benchmarking – 2019/2020 edition

Comprehensive report analysing updated benchmarks, KPIs, margins, … of the online gambling industry

London/Munich, August 2019

Summary

MECN is proud to present the new 2019/2020 edition of our report "Online Gambling Benchmarking Study". The first editions of the report were received very well, and as the online gambling market changes quickly, we are now happy to publish an updated version of our report.

As before, the report offers a comprehensive analysis and benchmarking of key performance indicators (KPIs), key business figures, relevant margins, and much more to enable executives in the online gambling industry to improve both controlling and operations.

The report is a must-read for all strategists and executives in the industry who want to save the time and money of compiling their own database – we have done it for you. Readers of the first editions of the report were impressed:

> *"The report saved me and my team weeks of number crunching." (CFO of online gambling operator).*

Content of the report

The report offers unprecedented insights into the industry:

- **Current data and KPIs as well as historical data** – Our benchmark analyses are based on the most recent data and KPIs and also trace long-term developments.
- **Revenue growth benchmarks** are broken down by products/verticals.
- **Analyses of financial results**, such as EBITDA, EBIT, … including comparison of margins.
- **Expense/costs benchmarks and margins**, such as marketing, staff costs, ...
- **Player/customer-related benchmarks**, such as active player development.
- **Product-related benchmarks**, such as product/vertical split, breakdown of casino revenues by type of games, …
- **In-play/live betting benchmarks,** such as in-play/live betting's share of total wagers, in-play/live betting gross revenue margins, ...
- **Mobile business benchmarks**, such as mobile share of total online business, mobile share of total online casino/gaming business, ...
- ...

In total, the report has **68 pages and ca. 90 graphs/exhibits.**

Table of contents

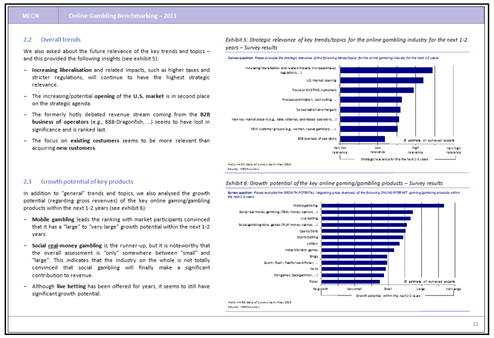
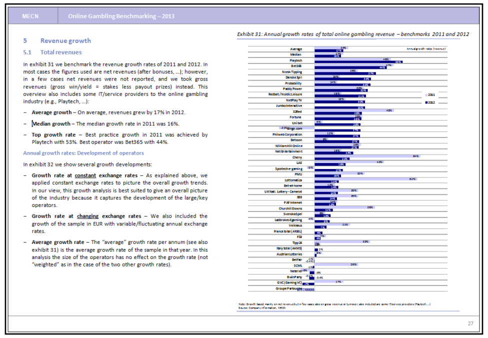
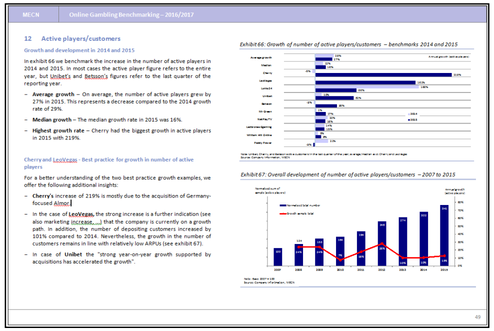
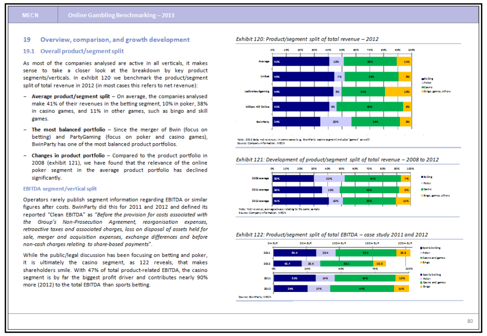
Exhibits

Top affiliate betting advertisers/brands (websites) in key European markets
Top affiliate betting advertisers/brands (websites) in Germany, Spain, Italy, France, Sweden, and the U.K.
Industry background of MECN survey participants

List of mentioned companies

888	Kindred
Ahaworld	LeoVegas
Bet365	Lotto24
Bet-at-home	Lottomatica
Betsson	Nektan
Better Collective	Net Gaming
Catena Media	NetEnt
Cherry Online Gaming	PAF Internet
Churchill Downs	Playtech B2B
Evolution Gaming	Plus 500
France total (ARJEL)	PPB (Flutter) Online
Gambling.com Group	Scout Gaming
Gaming Realms	Sisal
Global Gaming	Stars Group
GVC Online	Svenska Spel
Jackpotjoy Group	Webis
Jumbo Interactive	William Hill Online
Kambi	Zeal / Tipp24
Karamba	...

Sample pages of the report

About authors and contact information

MECN is a network of experts on issues concerning the media and entertainment industry. Together we provide in-depth knowledge, analysis, and advice to global clients. For the gambling industry, we provide market insights and strategic support to various clients ranging from bookmakers to state/public operators.

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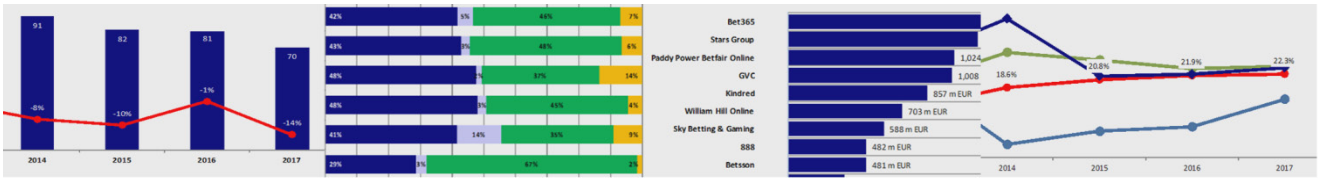

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