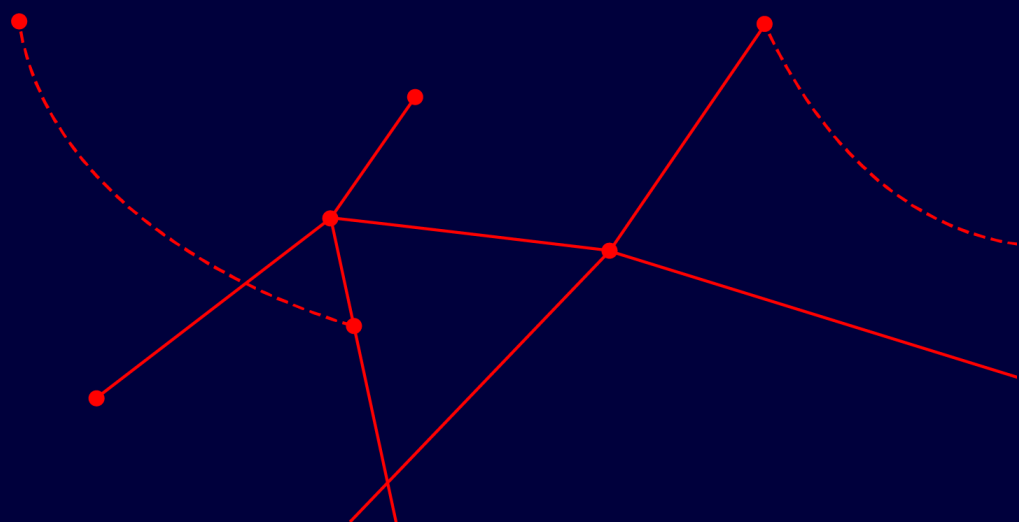


Sportradar Integrity Services

Netherlands Sports Betting Facts and Figures

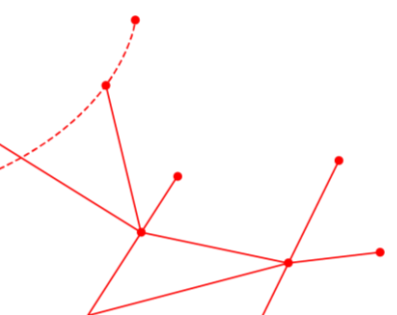
June 2021



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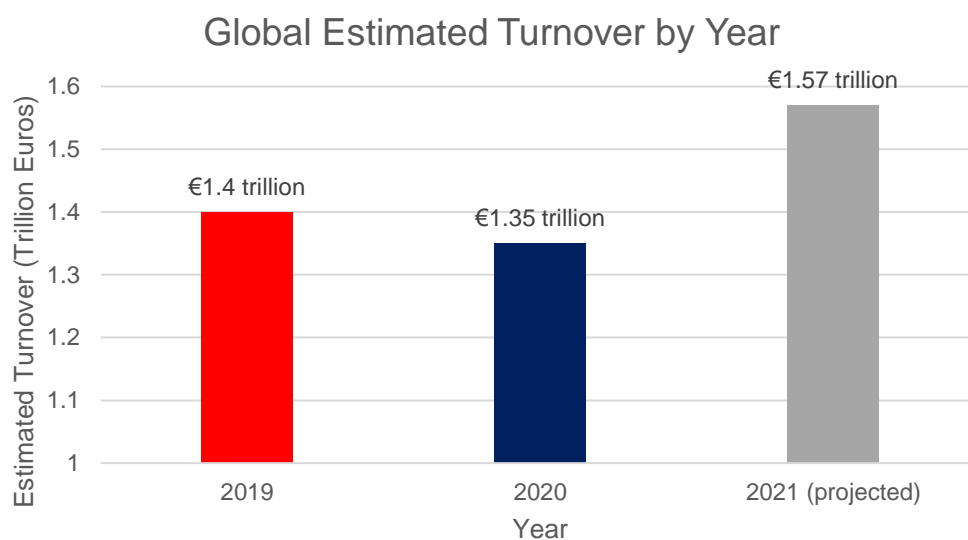
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Facts and Figures on the Dutch Betting Market

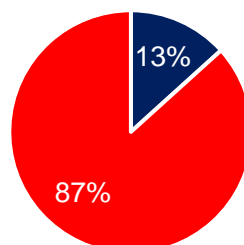
This document outlines the sports betting turnover generated both globally and in the Netherlands over the last three years, whilst also providing estimates on the proportion of the market that is staked through unregulated or illegal means. A summary is also provided on the top Dutch competitions in terms of betting turnover, with details provided on which global bookmakers contribute to this turnover. Global turnover refers to the total sum of money staked on all sports betting relevant competitions within a given year (note: this can be often referred to as 'handle' and is not GGY).

Global Turnover

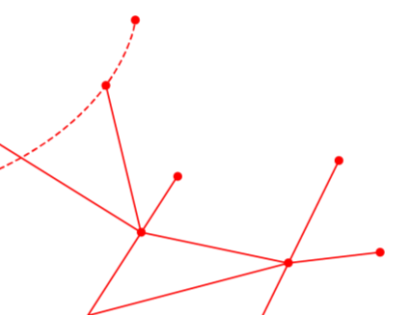


The total turnover for 2021 is expected to be around €1.57 trillion, a 16.3% increase from 2020 which saw a decrease from the previous year due to COVID-19 causing wide-scale disruption to sporting competitions around the world. Additionally, the postponed 2020 UEFA European Football Championship is expected to generate over €80 billion in 2021.

Regulated/Legal Turnover vs. Unregulated/Illegal Turnover



■ Regulated/Legal Turnover ■ Unregulated/Illegal Turnover



Just 13% of the turnover each year is expected to be generated through regulated and legal channels¹. Conversely, the vast majority (87%) of the global turnover is expected to be generated through unregulated and illegal channels². By way of an example, Dutch bettors staking at Unibet under the current legal system would be classified as unregulated or illegal betting turnover.

Netherlands Turnover

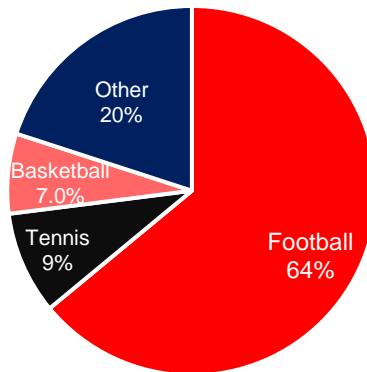


There was an estimated €3.8 billion staked in the Netherlands in 2020, with just €143.3 million (4%) of this recorded through regulated/legal channels. This is due to the state holding a monopoly on sports betting, leading many bettors to stake their money through alternative means.

¹ This refers to betting turnover collected by licensed bookmakers operating under robust and respected regulations. An example of that is turnover collected by the state operator in countries where betting is a state monopoly, or turnover collected by all registered operators in countries with well-regulated betting legislation.

² This refers to betting turnover collected by licensed bookmakers operating in a loosely regulated region, or bookmakers without a license who are unregulated.

Top Sports by Betting Turnover

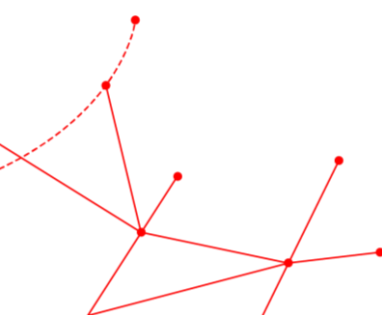


Football is by far the most popular sport in terms of betting turnover, with this accounting for nearly two-thirds of all turnover staked in the Netherlands. Tennis and Basketball are the next most popular sports, with these three sports also the top three sports wagered on globally. However, it should be noted that Basketball accounts for 22.6% of turnover globally compared to just 7.2% in the Netherlands, demonstrating that this sport is relatively less popular in the Netherlands.

Competition	Sport	Average Turnover per Match
Eredivisie	Football	€17,683,431
Eerste Divisie	Football	€10,901,380
KNVB Beker	Football	€10,377,612
Beloften Eredivisie	Football	€4,483,391
Eredivisie, Women	Football	€1,278,265

As expected, the top football competitions in the Netherlands generate the most turnover globally.

The majority of this turnover is generated at largely unregulated Asian bookmakers (examples include bookmakers such as Singbet, Nova88, SBObet and Pinnacle Sports). A significant proportion of turnover is also generated at European bookmakers. The top three European betting companies are Flutter Stars Group (Paddy Power, Betfair, SkyBet) who boast a revenue of €4.42 billion, Entain PLC (Ladbrokes, Coral) with a revenue of €4.31 billion, and Bet365 Group Ltd which have a revenue of €3.49 billion.



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