

+++ Bet-at-home +++ Bet365 +++ Bet777 +++ Betsafe +++ Bwin +++ Interwetten +++ Ladbrokes +++
NordicBet +++ Sportingbet +++ Tipico +++ Bet-at-home +++ Bet365 +++ Bet777 +++ Betsafe +++ Bwin +++

Study Profile

Marketing Mix Analysis Virtual Sports Betting 2019

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March 2019



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Marketingmaßnahmen
erfassen, verstehen, bewerten

Study Profile Marketing Mix Analysis
Virtual Sports Betting 2019

Information on study

Key facts Marketing Mix:

- Three of ten analyzed sports betting brands are offering the maximum amount of seven sports.
- Since betting is international there are a lot of languages offered. Their amount varies between three and a total of nineteen languages.
- With regard to the payment options there are huge differences between the providers. The range goes from eight to 24 options.
- The analysis of 20 comparison websites shows, that the analyzed sports betting brands are listed in the average in 13.2 comparison websites. One provider is listed in all analyzed comparison website.
- Four sports betting brands are offering a 24/7 hotline. The response quality of mystery calls is not significant better than the quality of mystery mails. Several companies don't answer mails at all.
- Although search engines are very important for research in the internet, no provider has paid ads on Google or Bing.
- The companies show large restrain in their promotion. There weren't any posts in social media channels related to virtual sports betting.

Information on study

Key facts Marketing Mix:



➤ **Ø 4,8**
virtual sports betting
products offered
per brand



top-performance
servicecenter:

➤ **bet-at-home**



top-performance
comparison websites: ➤ **Bet365**

Marketing Mix Virtual Sports Betting



highest quantity of
withdrawal and
payment options:

➤ **Bwin**

➤ **Ø 0.4** relevant press articles
per brand per year

➤ **no relevant postings**
in social media

promotion



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Information on study

Benefits and Scope:

analysis focuses **marketing activities** of ten competitors

content: **Product, Price, Place, Promotion**

integral analysis from the view of ten
virtual sports betting brands

all information on **291 PowerPoint slides**

short delivery as **PDF** and **PowerPoint file**

study is **objective, independent** and **neutral**

benefits: usable for clear positioning and adequate reaction
to marketing activities of competitors

10 analyzed brands:

- Bet-at-home
- Bet365
- Bet777
- Betsafe
- Bwin
- Interwetten
- Ladbrokes
- NordicBet
- Sportingbet
- Tipico



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Information on study

Analyzed Brands:

Bet-at-home

maximum amount of placing bets at once

Bet365

strong performance in comparison websites

Bet777

high answer quality for mystery mails

Betsafe

phone calls: personal first contact

Bwin

high answer quality for mystery mails

Interwetten

strong presence in comparison websites

Ladbrokes

high maximum of winning per day

NordicBet

high answer quality for mystery calls

Sportingbet

high streaming quality

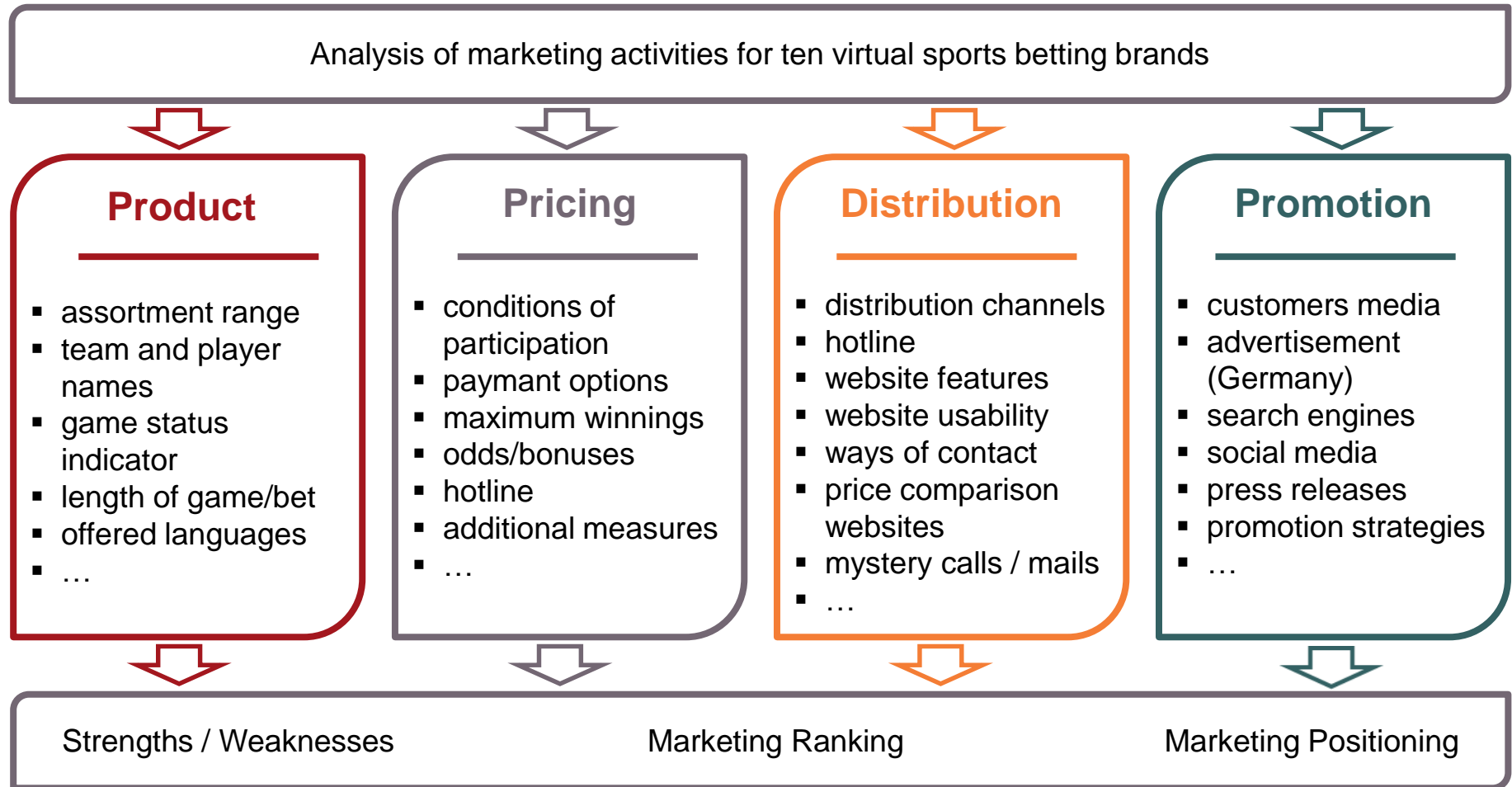
Tipico

high amount of offered sports

This study analyzes particularly marketing-active brands in the betting sector. The basis of the selection is a preliminary research on product portfolio, pricing, distribution and communication.

Information on study

Research Design:



Information on study

Study content:

Analysis:

- comparison of offered sports
- comparison of total amount of play principles and type of bets
- comparison of available payment options
- presence in price comparison websites and search engines
- evaluation of phone calls at the analysed companies
- evaluation of online requests at the analysed companies
- spendings for promotion in Germany / motives in internet, print, radio, TV
- presence in social media (Facebook, Google+, Twitter, YouTube)
- analysis of consistency and unique positions according to USPs and motives in promotion
- Marketing Mix Ranking based on all analysed marketing activities
- Marketing Positioning based on correspondence analysis

Key data:

- 9 different sports
- >40 types of bets
- up to 24 payment options
- 20 price comparison websites
- 50 mystery calls, 50 mystery mails
- spendings for promotion in Germany (4 media)
- 4 social media channels

Design of research:

The study is based on information from own research, online databases, mystery research and secondary sources. **AdVision digital** provides spendings for promotion in media. The study is released in March 2019.

Price: The **291 pages** containing study costs **3,600 EUR** incl. VAT

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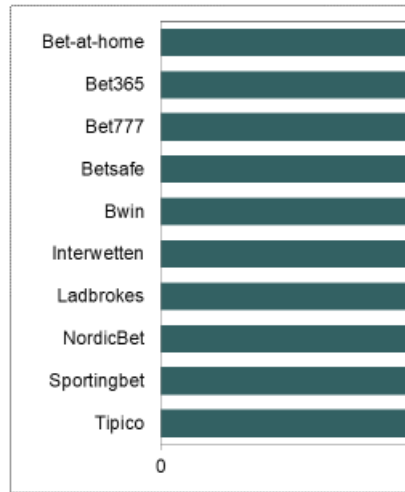
Samples of Analysis (1)

Please note: extracts show fictional data

Product

Product range – Soccer

Soccer: Total amount of play principles and type of bets



Source: company websites



Product

Product features – Technical aspects

Length of a game/race

Provider	Speedway	
Bet-at-home	3 minutes	
Bet365	4 minutes	
Bet777	5 minutes	
Betsafe	2 minutes	
Bwin	3 minutes	
Interwetten	4 minutes	
Ladbrokes	5 minutes	
NordicBet	2 minutes	
Sportingbet	3 minutes	
Tipico	4 minutes	

Source: company websites



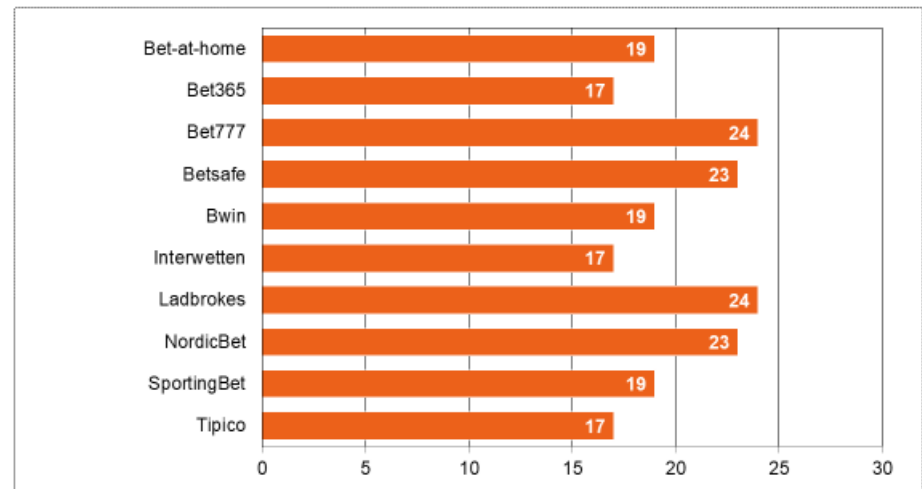
Which competitor offers the highest amount of betting types?

How many payment options can the player choose?

Conditions

Payment options

Quantity of available payment options



Source: company websites



Marketing Mix Analysis
Virtual Sports Betting 2019

Samples of Analysis (2)

Please note: extracts show fictional data

Conditions

Payment options

Provider's payment options and conditions (expressed in british pounds) – Brand A

Options	Payment options		Process time (in days)	
	W*	D*	W*	D*
Apple Pay	x	x	1 / 3	instant
Bank wire tr.	x	x	1 / 5	3 / 5
Maestro	x	-	3 / 5	instant
MasterCard**	x	x	3 / 5	instant
Neteller	x	x	0 / 1	instant
PayPal	x	x	0 / 1	instant
Paysafecard	-	x	-	instant
Skrill	x	x	0 / 1	instant
VISA	x	x	1 / 3	instant

Source: company websites; * W: withdrawal options; D: deposit options



Distribution

Servicecenter performance at phone calls

Phone calls

Provider	First contact	Waiting time
Bet-at-home	in person	X:16 – X: Min. Ø 0:X M
Bet365	recorded announcement	X:18 – X: Min. Ø X:29 M
Bet777	recorded announcement	X:37 – X: Min. Ø X:44 M
Betsafe	in person	X:18 – X: Min. Ø X:29 M
Bwin	recorded announcement	X:27 – X: Min. Ø X:33 M

Source: research tools

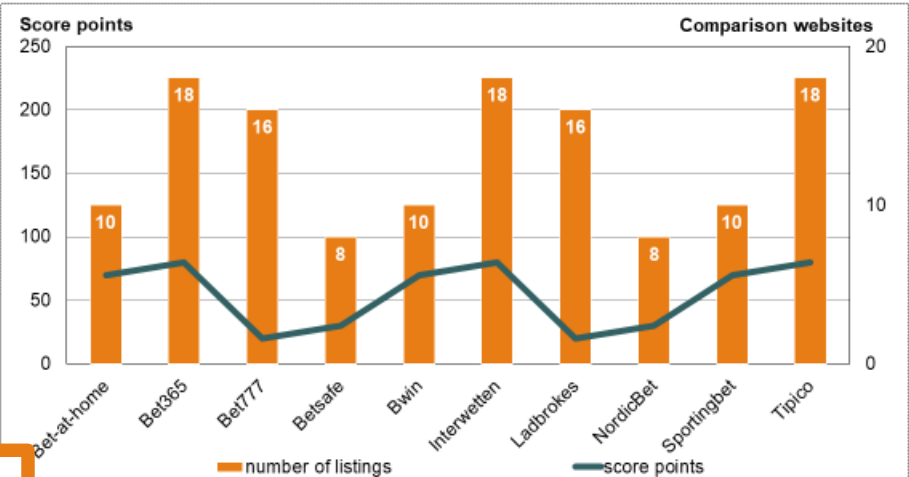


How often are the companies listed in comparison websites?

Distribution

Comparison websites

Listings in comparison websites by provider



Which provider achieves a satisfying servicecenter performance?

Samples of Analysis (3)

Please note: extracts show fictional data

Promotion

Search engines – search results

First Placement in search engines (position of the first listing)

Company	bing.de			
	1	2	3	4
Bet-at-home	53	88	1	1
Bet365	-	-	98	-
Bet777	90	-	-	-
Betsafe	-	4	-	-
Bwin	53	-	-	-
Interwetten	-	-	2	-
Ladbrokes	99	88	-	-
NordicBet	-	-	-	-
Sportingbet	53	-	-	-
Tipico	-	4	-	-

Source: research tools; * Evaluation of search engines Google and E

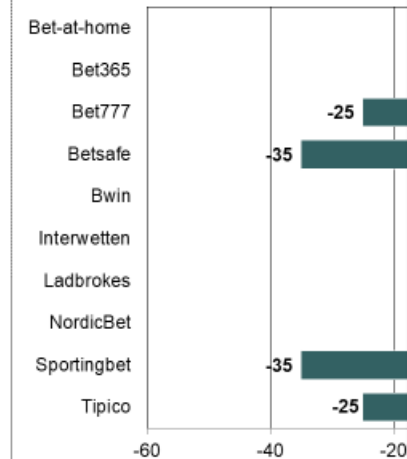


Promotion

Social media & PR – PR

Efficiency of press relations

Calculation: Share of press articles minus share



Source: german daily newspapers, consumer publications and profi



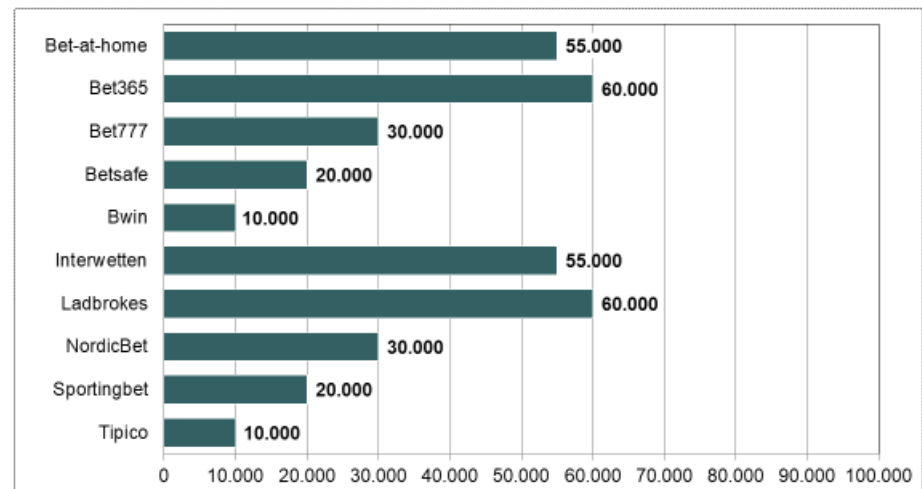
Which provider holds top position in search engines?

Which companies invest in media promotion?

Promotion

Advertisement – promotion spendings in Germany

Distribution of promotion spendings between November 2017 and October 2018 (in Euro)



Source: AdVision digital, calculated by research tools



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Samples of Analysis (4)

Please note: extracts show fictional data

Promotion

Active and passive presence in media: Share of impact for Facebook, Google+, Twitter and YouTube as well as share of press releases and press articles

Company	Facebook	Google+	Twitter
Bet-at-home	5,0	10,0	5,0
Bet365	5,0	10,0	5,0
Bet777	33,0	-	-
Betsafe	33,0	-	-
Bwin	5,0	10,0	5,0
Interwetten	5,0	10,0	5,0
Ladbrokes	33,0	-	-
NordicBet	33,0	-	-
Sportingbet	5,0	10,0	5,0
Tipico	5,0	10,0	5,0

Source: research tools; * press releases; ** press articles

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Marketing positioning

Positioning/Similarity of the companies

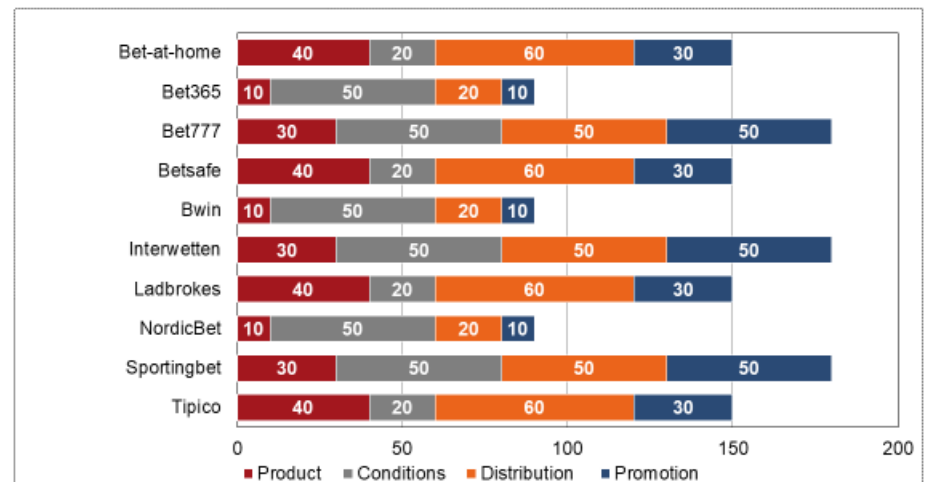


Which companies show a similar focus on marketing activities?

Marketing ranking

Marketing-Mix overall

Marketing-Mix-Efforts overall (in %)



Which provider offers convincing performance in social media?

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Following studies on the gambling sector were released lately:

- Studie Sponsoring Glücksspiel 2018
- Studie eVisibility Glücksspiel 2017
- Werbemarktanalyse Glücksspiel 2017
- Studie Glücksspielmarkt-Zielgr. Lottospieler < 45 Jahre 2017
- Studie Unternehmensprofile Glücksspiel 2017
- Marketing-Mix-Analyse Sportwetten 2017

Since 2005, research tools has been doing research within marketing and competition and positions itself as a marketing studies specialist. Since 2016, twelve studies have been published on the gambling sector.



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