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Media & Entertainment Consulting Network

## The Spanish Gambling Market

Key region for future growth

London/Munich, November 2006

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## Summary

William Hill has already started its expansion into Spain, more and more Spanish soccer teams are sponsored by online gambling companies, ... - these are just a few of many clear signs that the gambling industry starts to focus on Spain for future growth.

After the recent legal conflicts in traditional gambling markets a key strategic option is the expansion into less restrictive jurisdictions or into regions where an increased liberalization might be possible in the short term. Many operators surveyed mentioned Spain as a particularly attractive jurisdiction for such an expansion.

The following are some reasons why Spain is perceived as so attractive:

- **Increasing liberalization** - Many autonomous regions in Spain are working toward a liberalization of the market, particularly the betting sector as well as interactive gambling could benefit from that.
- **William Hill and other big players are already poised for expansion into Spain** - Many international companies, such as William Hill or Betbull/BWin, already have joint venture agreements in place and are poised to take advantage of the market in Spain.
- **Growth potential, especially for retail betting and interactive gambling** - Overall Spain's gambling market is expected to grow to Euro 39 billion by 2010.

By 2010 the retail betting market is expected to grow to ca. Euro 4.5 billion, which is more than 750% larger than its current size (CAGR of 71%).

The other growth driver will be interactive gambling, which is expected to reach ca. Euro 4.2 billion by 2010, a growth of ca. 240% (CAGR of 36%) over the current level.

- **Lotto craziness** - Spain's lottery market is one of the largest in the world and can boast impressive per-capita sales.

## Sample pages of report

The collage displays several pages from the report, including:

- 6 The betting market**: A section header for the main report.
- 6.1 History and development**: A sub-section header.
- 6.2 Market size and key figures**: A sub-section header.
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## Companies mentioned in this report

888.com	Expekt	Orenes
AEDAPI	Facomare	PartyGaming
Atzaria	Global Bingo Corporation	Planeta
Ballesteros	Globet	Rank
Bet365/Jugandovoy	Godó	Recoletos
Betbull	Grupo Automáticos Canarios	Serviapuestas/Fluxx
Betfair	Indra Sistema	Sogecable
Betfred	Interwetten	Sportingbet/Miapuesta
Betpoint	Juegablingoya	Sur
Bwin (BetandWin)	Lotojuegos	SX Networks
Centrebet/Iberapuesta	Lottomatica	Telefonica
Codere	Masampe	Unibet
DigiDis	Mobipay	Unidesa
Ekasa	Oberthur	Ventura24/Tipp24
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