

THE IMPACT OF BETTING REGULATIONS ON FOOTBALL SPONSORSHIP

Focus on the Netherlands - Football Clubs

2024





REPORT OVERVIEW

The Netherlands is introducing a ban on gambling advertising and sponsorship, which has the potential to heavily impact the revenues of football clubs and leagues once it starts in 2025.

This report sets out three routes to help mitigate against the potential revenue loss:

1. Renegotiate existing sponsorship deals, changing the mix of rights received by sponsors
2. Create new value through sponsorship assets, creating a broader inventory of rights to sell
3. Target new categories to find brands that can supplement or replace betting sponsorship

There are numerous considerations and factors to consider with any mitigation strategy, but collaborative, league-wide approaches can also help to minimise revenue impact on clubs.

STRUCTURE

01 MARKET CONTEXT

02 BETTING REGULATIONS

03 MITIGATION STRATEGY

04 PLAN IN ACTION





01

MARKET CONTEXT

BETTING SPONSORSHIP IS WIDESPREAD IN EUROPEAN FOOTBALL



Betting brand sponsorship is currently restricted in two top leagues in Europe, with two set to introduce restrictions over the next 2 years.

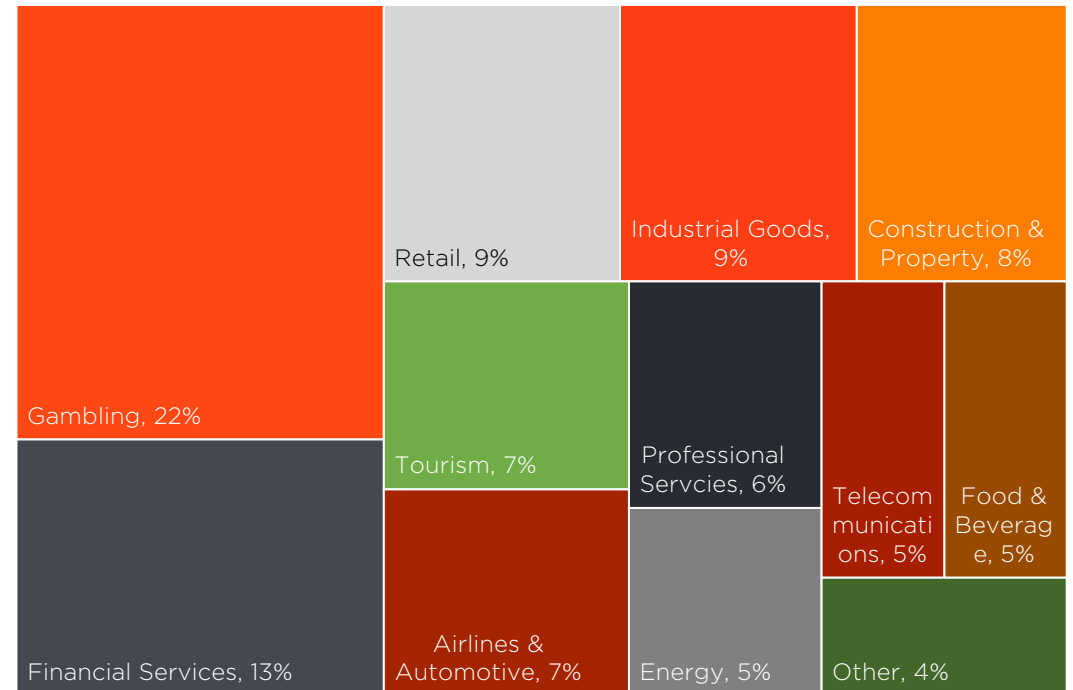
Gambling brands spend heavily on primary sponsorship rights and account for nearly a quarter of front of shirt partnerships in European football.

Some clubs have multiple betting partners, often segmented by geographical region with a focus often being Asia.

EUROPEAN BETTING SPONSORSHIP REGULATIONS

Premier League (England)	Front of shirt betting ban from 2026
Bundesliga (Germany)	No regulations
La Liga (Spain)	Total betting sponsor ban
Serie A (Italy)	Shirt sponsorship banned
Eredivisie (Netherlands)	Regulations being introduced in 2025
Primeira Liga (Portugal)	No regulations

MAIN SHIRT SPONSOR CATEGORIES 2022/23



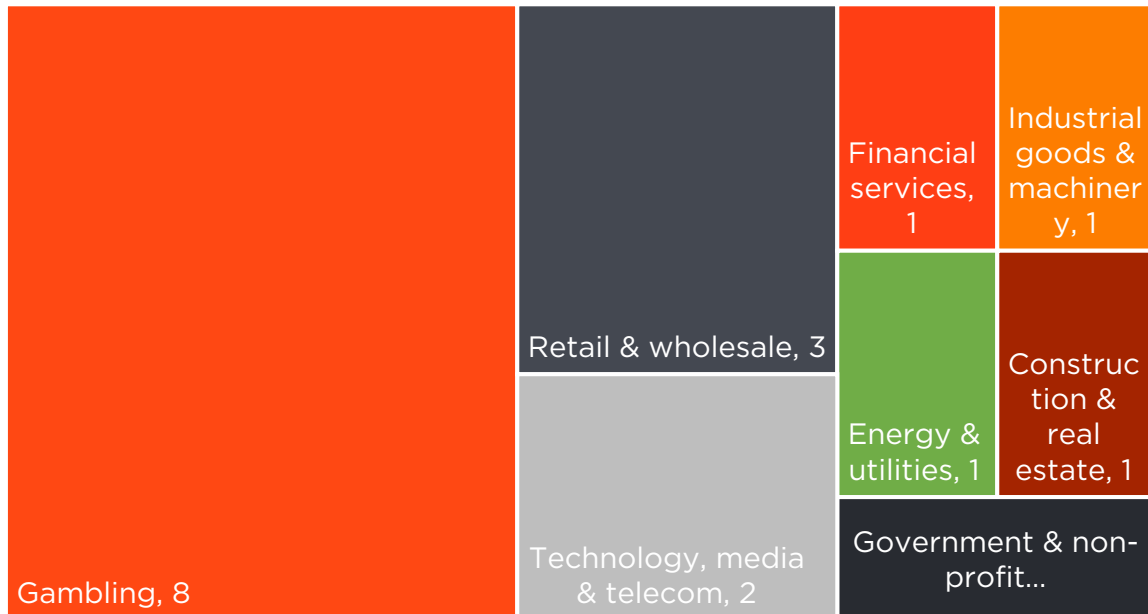
GAMBLING BRANDS HAVE A LARGE IMPACT ON CLUB REVENUES



Current regulations allow marketing of gambling brands throughout football, visible in stadia, on kit and across social media.

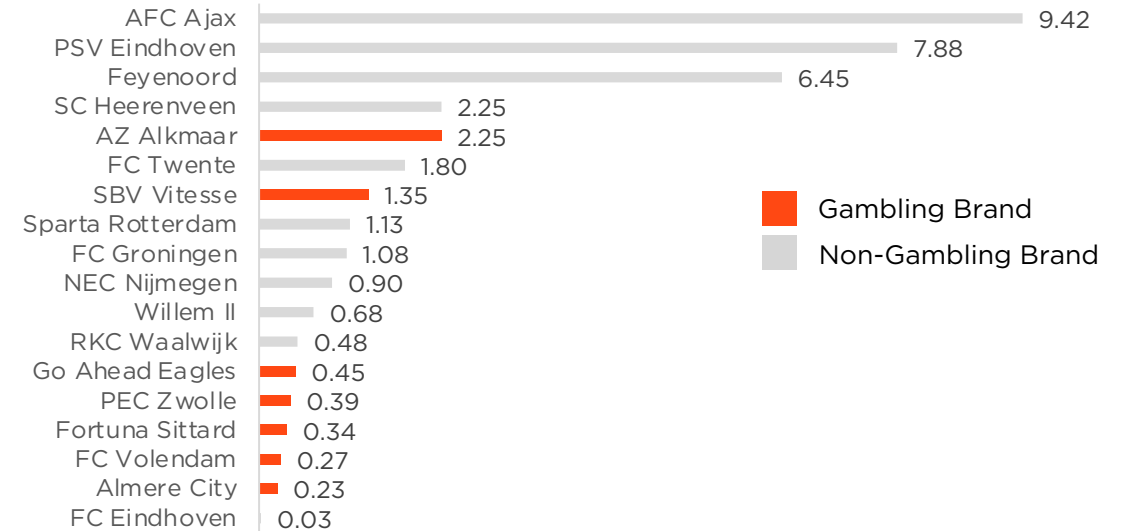
Betting partnerships are prevalent in the Netherlands and is the most common category across front-of-shirt sponsorship.

MAIN SHIRT SPONSOR CATEGORIES



Source: GlobalData

MAIN SHIRT SPONSOR ANNUAL VALUE (€M)



TOP SPENDING GAMBLING BRANDS





02

BETTING REGULATIONS



REGULATIONS IN THE NETHERLANDS WILL ESCALATE OVER THE NEXT FEW YEARS



In 2023, the Kansspelautoriteit (Netherlands Gaming Authority) introduced strict advertising rules for remote gambling licensees (the Decree on Untargeted Advertising for Remote Games of Chance) and that in principle, all advertising of gambling-related companies is **prohibited**.

Regulation Overview

- The restrictions came into force on 1st July 2023
- The following forms of advertisement are prohibited:
 - Commercials on television, radio and in cinemas
 - Untargeted advertisements and video advertisements on websites, digital channels and social media platforms
 - Advertisements in magazines or newspapers and placements in public places
 - Online advertising is permitted if companies a) provide the chance for persons to opt-out, b) they take the best available measures to exclude certain persons (e.g. risky gamblers, minors and those opted-out) and c) they can show that at least 95% of those reached were over the age of 24
- Advertising of the National Lottery, and other lottery products, will still be allowed under the new regulations. Betting-related games will, however, be banned.

SPONSORSHIP ACTIVITY WILL BE HEAVILY IMPACTED



The regulations will have a significant financial impact on football, with prominent commercial revenue streams being limited as a result.

Impact on Sport

- The decree states: “Sponsoring matters other than sports will be prohibited from 1 July 2024, and sponsoring sports will be prohibited from 1 July 2025”.
- A transition period is between July 2024 and 1st January 2025 is currently in place to respect current contracts with partners.
- These transitional periods only apply to sponsorship agreements existing before 1 July 2023.
- From 1st July 2025, all untargeted advertising for remote gambling companies will be prohibited such as:
 - Kit/Shirt placements
 - Advertising boards
 - Stadium branding
 - Digital advertising

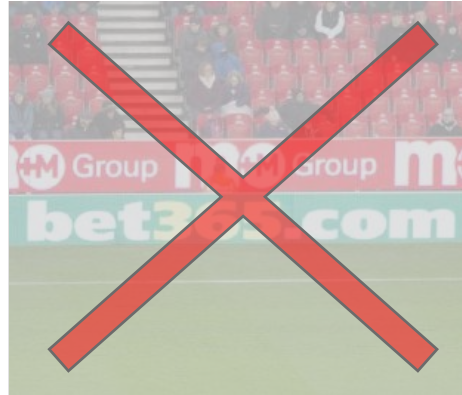


KEY SPONSORSHIP RIGHTS WILL BE OFF-LIMITS

The impact of the regulations will affect branding rights and other forms of untargeted advertising. Potentially, other targeted rights could be possible



FRONT OF SHIRT



LED BOARDS



INTERVIEW BACKDROP



STADIUM BRANDING



OTHER SHIRT
BRANDING
(i.e. Shirt Sleeve +
Back of Shirt)



ONLINE ADVERTISING
(WITH RESTRICTION)



APPEARANCES &
EXPERIENCES

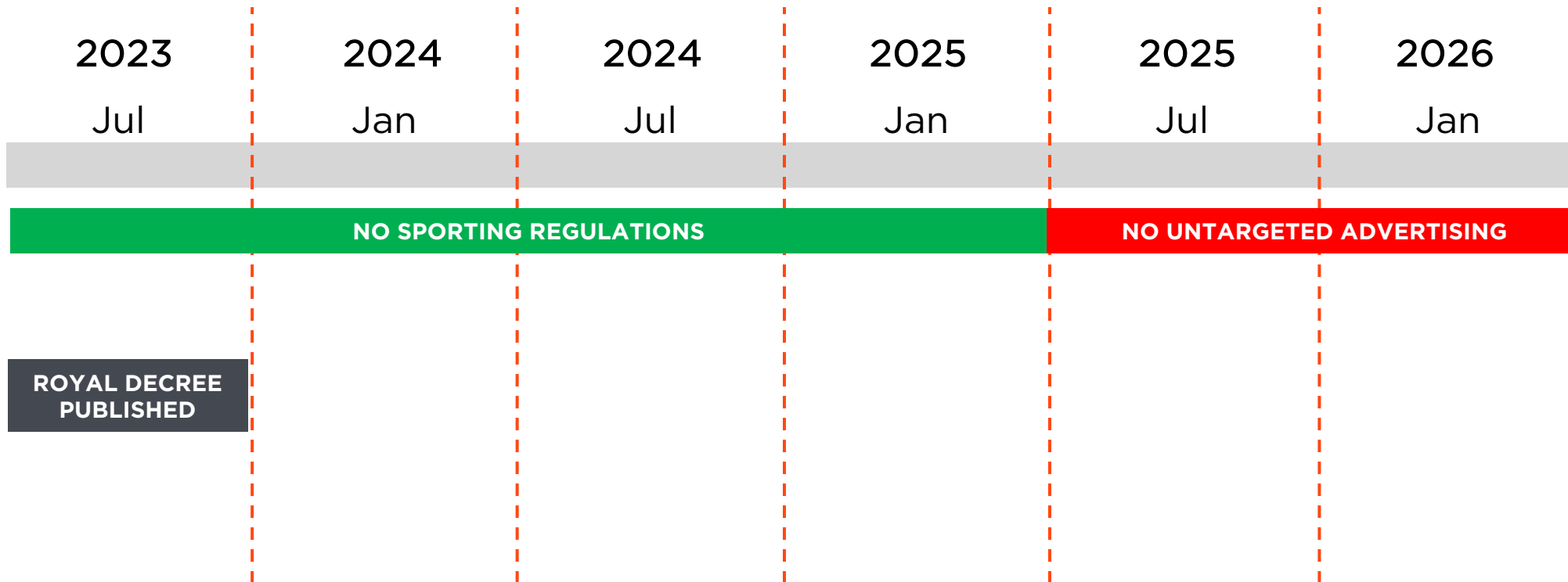


DIGITAL PLATFORMS

THE REGULATIONS PROVIDE A WINDOW TO ADJUST SPONSORSHIP ACTIVITY



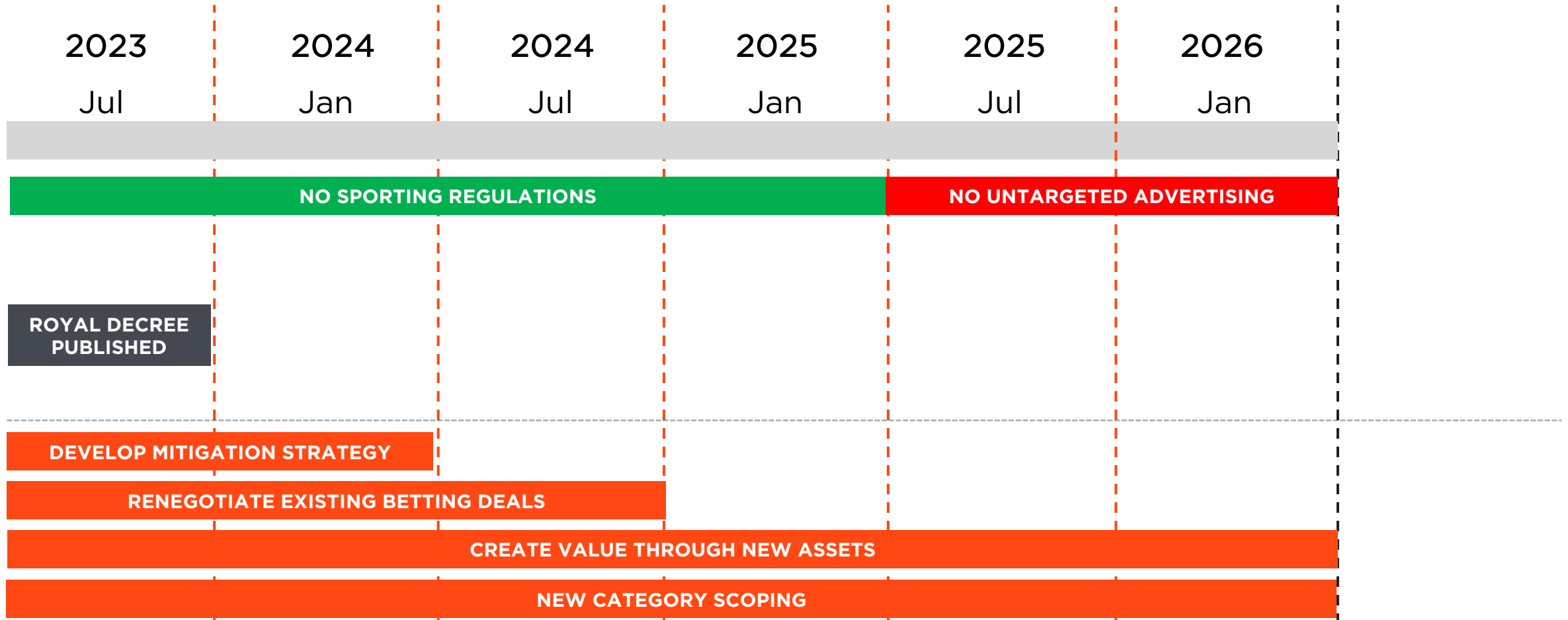
The regulations are being phased in, with a transition period until July 2025 to respect current contracts.



CLUBS MUST DEVELOP A CLEAR STRATEGY TO MITIGATE AGAINST REVENUE LOSS



With the timeline for restrictions, it is important to plan and implement a strategy for mitigating against this potential revenue loss.





03

MITIGATION STRATEGY



WE SEE THREE APPROACHES THAT CAN HELP MITIGATE AGAINST THE REGULATIONS

With the staggered approach to enforcing the regulations, clubs and betting brands have the chance to develop a plan in the short to long term.

SHORT TERM

RENEGOTIATE EXISTING BETTING DEALS

- For any clubs with contracts affected by the bans on stadium advertising, they could look to renegotiate the terms of their existing deals.
- This will allow them to keep these partners onboard by altering their asset mix to comply with the new regulations as well as proactively looking to adjust their rights to maximise value and impact for these brands in other ways.

MEDIUM TERM

CREATE NEW VALUE VIA SPONSORSHIP ASSETS

- With the rise in digital media consumption, football clubs increasingly need to meet their fans where they spend their time which, for most, is online via connected platforms across multiple devices.
- The opportunity for clubs is to create or grow digital platforms which can connect brands to their fans, creating valuable assets and revenue streams.
- These platforms help clubs and partners to acquire data, drive customer acquisition and develop deeper relationships with fans.

LONG TERM

TARGET NEW CATEGORIES

- With fewer opportunities for betting brands to show up through traditional partnership assets, clubs should also seek out other sponsorship categories.
- Target categories can be based upon gaps in their existing portfolio and industry intelligence. These could be existing or emerging categories which offer a chance to replace revenue that will be lost because of the betting ban.
- A clear go-to-market strategy and sales approach will be needed to effectively target relevant brands.



3.1

RENEGOTIATE EXISTING BETTING DEALS



BY UNDERSTANDING SPONSORSHIP OBJECTIVES, RIGHTS PACKAGES CAN BE ADAPTED

Why do Betting Brands Invest in Football Sponsorship?

Football provides reach as Europe's most popular sport, with an audience that over-indexes in young men, interested in gambling.

Prominent sponsorship assets like kit and stadium branding generates high media exposure which can impact brand awareness.



129m Fans

Interested in football in Europe



Young & Male

69% of fans are males and aged 16-44



Gambling Interest

71% of that group are interested in gambling

Sponsorship in football is likely to have a tangible business impact for betting brands.

The audience alignment and ability to engage them in a natural environment means brands are willing to invest in large deals.

+48% More Likely to Consider Sponsors

Football fans interested in gambling are more likely to consider sponsor brands and purchase their products than the general population

+59% More likely to Purchase from Sponsors

This audience is digitally savvy, using multiple platforms and technologies to interact with football and their favourite club.

This presents opportunities for brands to interact and market to potential or existing customers via club and owned channels.



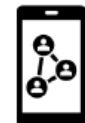
Tech Confident

More likely to be assured in using different technologies



Club Content

More likely to engage with content from their favourite club



Social Users

More likely to use social media for more than 3 hours a day

BETTING BRANDS HAVE HISTORICALLY FAVOURED BRAND PLACEMENT RIGHTS

What Sponsorship Assets do Betting Brands Currently Buy?

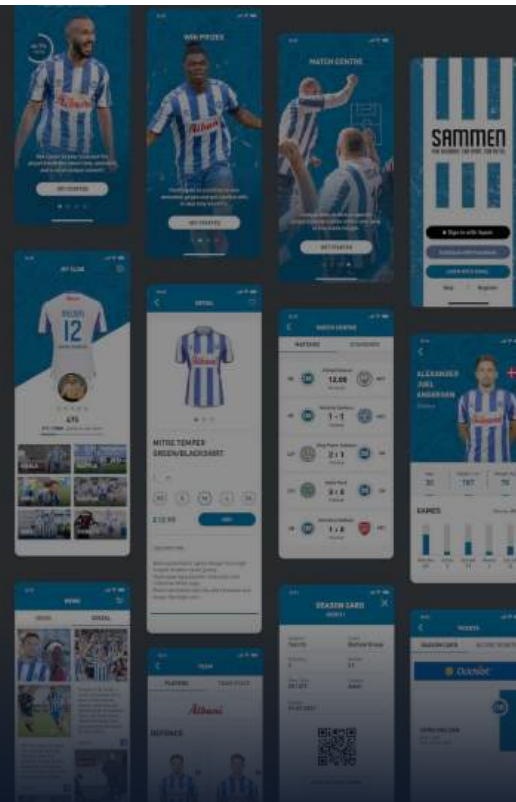
Betting brands activate across a range of assets, predominantly through mass awareness branding but also through digital channels using a varied asset mix

BRANDING



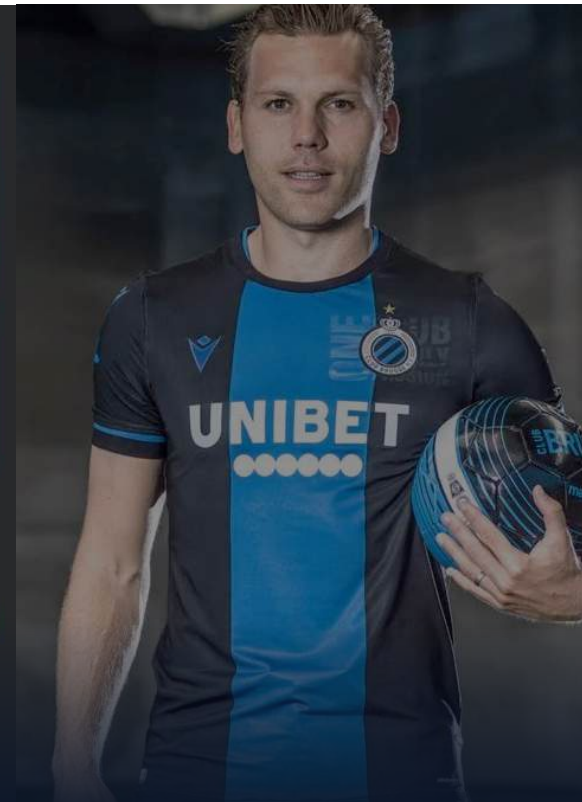
On kit assets (playing/training)
LED perimeter boards
Interview backdrop
Stadium screen branding

DIGITAL



Social media posts
Database communication
Website/app advertising

MONEY-CAN'T-BUY



Player/manager/ambassador access
Pitch access
Watch team training

OTHER BENEFITS

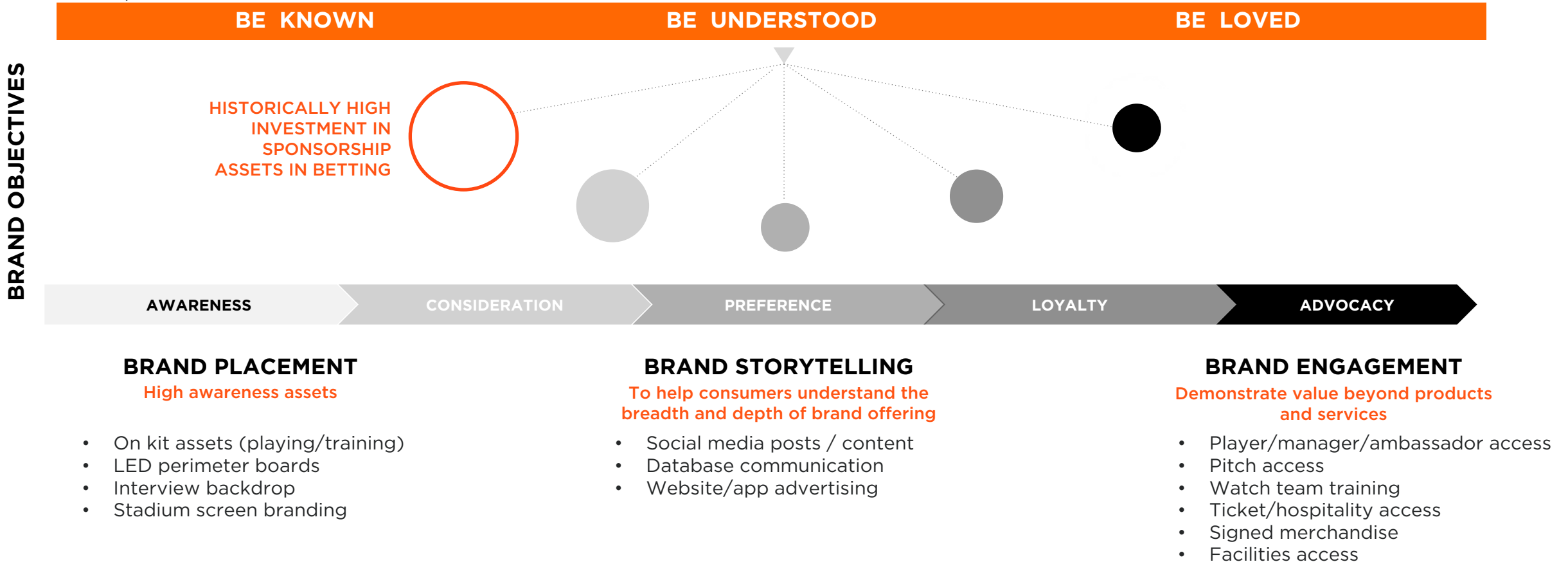


Ticket/hospitality access
Signed merchandise
Facilities access

THESE RIGHTS HAVE PLAYED A SPECIFIC ROLE IN DRIVING BRAND AWARENESS

What Sponsorship Assets do Betting Brands Currently Buy?

Wasserman's tool 'The Pendulum', helps us assess what asset mix best meets brand needs, based on objectives. Betting brands have historically invested heavily in brand placements on highly visible assets (e.g. playing kit, LED boards).



CLUBS NEED TO BE ABLE TO PROVIDE MORE VALUE VIA STORYTELLING & ENGAGEMENT

How Could Betting Brands Show Up Differently?

With restrictions impacting brand placement assets, clubs need to be able to communicate the value they can offer betting brands via storytelling and engagement assets to retain revenue from the sector.



ADJUSTING THE SPONSOR OFFERING IS VITAL

How Can Clubs and Brands Adjust?

MOVE AWAY FROM BRAND PLACEMENTS

Ready-made awareness assets will no longer be possible. Therefore, brands will need to show up through other targeted platforms. Clubs will need a strong offering across owned platforms and brands will need to invest more in their own activation.

FOCUS ON DIGITAL PLATFORMS

With a digitally savvy audience, clubs need to double-down on their own media platforms ensuring they can deliver targeted visibility and audience interactions for brands, with the ability to measure performance.

CUT-THROUGH WITH PERSONALISED CONTENT

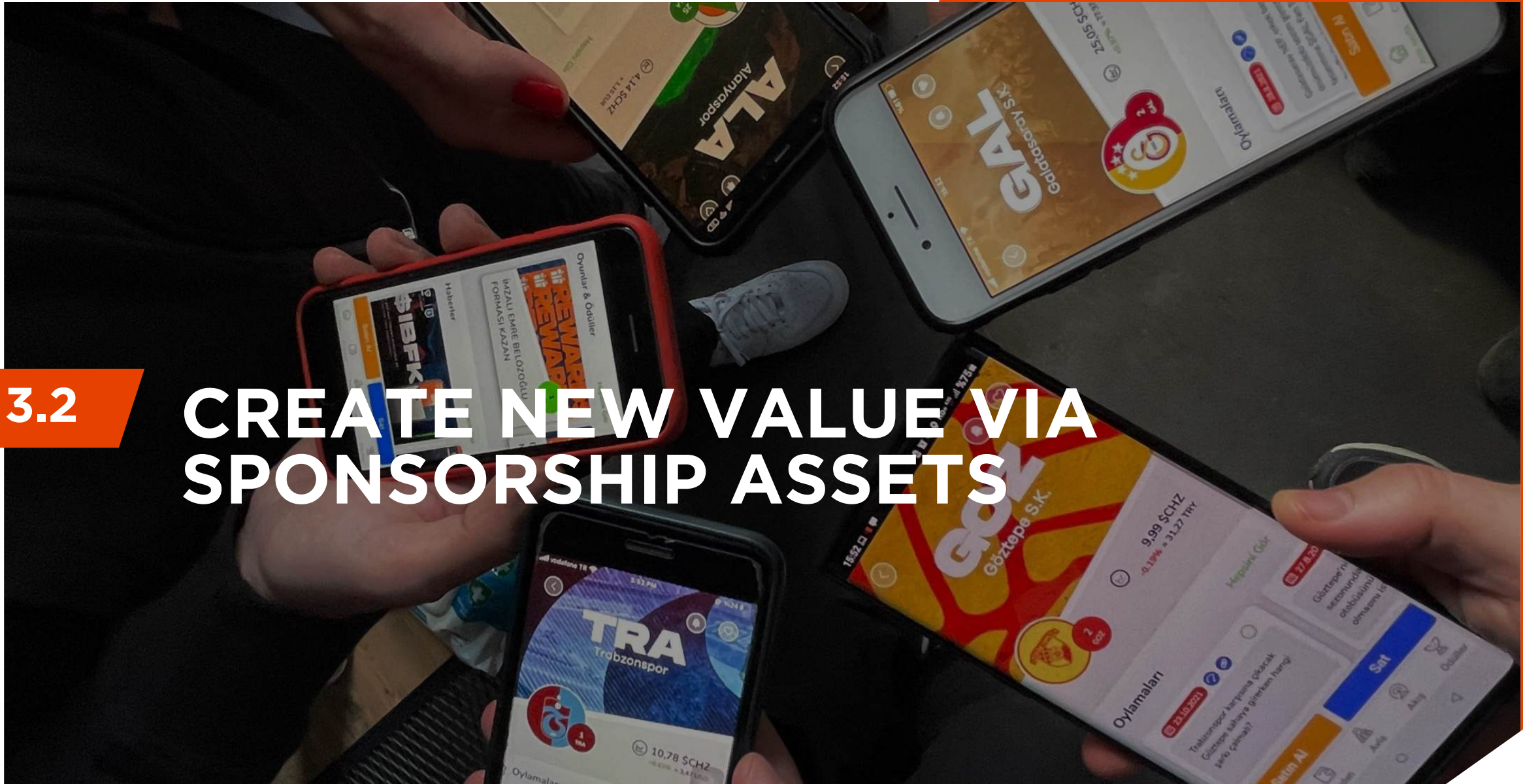
In a cluttered market, brands need to differentiate themselves. Clubs can offer them a passionate and content-hungry audience. Collaborating on great content that is personalised to the target audience can create a winning situation for all.





3.2

CREATE NEW VALUE VIA SPONSORSHIP ASSETS



CLUBS WILL NEED TO CREATE VALUE FOR BRANDS IN DIFFERENT WAYS

The opportunity for value creation lies in creating ways to interact with fans in the places they currently spend their time or where they will spend more of their time in future.

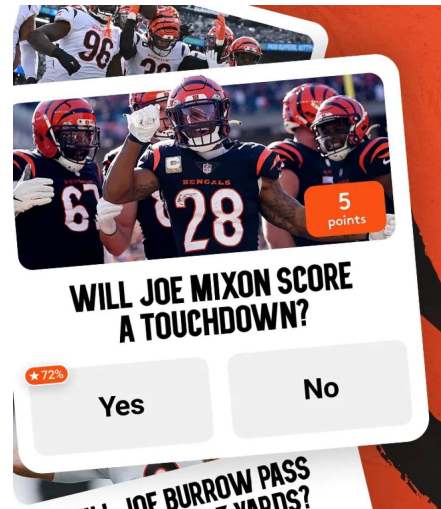
Developing mechanisms for these interactions on owned or third-party platforms creates opportunities for brands to engage with fans and learn more about them.

Some examples of these are:

Fan Data Acquisition



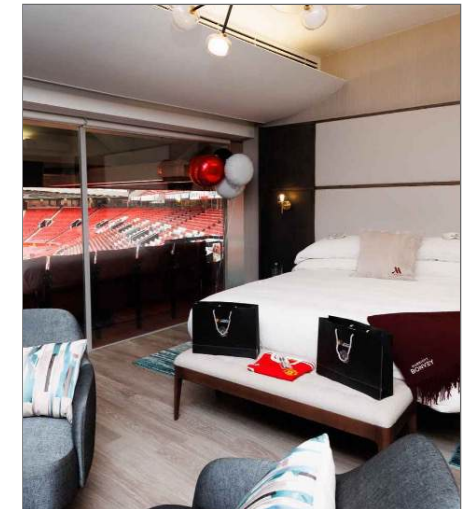
Free-to-Play Games



Personalised Content



Unique Experiences



FAN DATA CAN DRIVE MANY OUTCOMES

FAN DATA ACQUISITION MECHANICS

Fan data is a hugely valuable asset that can be leveraged through partnerships. Campaigns that require fan signup in exchange for chances to win exclusive prizes are the most common way of collecting fan data while engaging with a fanbase.

Cognizant suggests clubs could easily achieve a 10-20% increase in sponsorship value if they could show sponsors that they control a database of contact information on which they can jointly activate.

Everton x Socios



- Fans sign up to purchase fan tokens, entering various data points
- Fan token holders then get the opportunity to vote in polls to have their say on aspects of the club e.g. pre-match music
- Fans can also win the chance to play on the pitch, meet players and win signed shirts – all assets Socios receive as part of partnership



DATA ACQUISITION NEEDS A VALUE EXCHANGE

FREE TO PLAY GAMES

One of the main benefits of using F2P assets is bringing a brand's target consumer into its marketing funnel

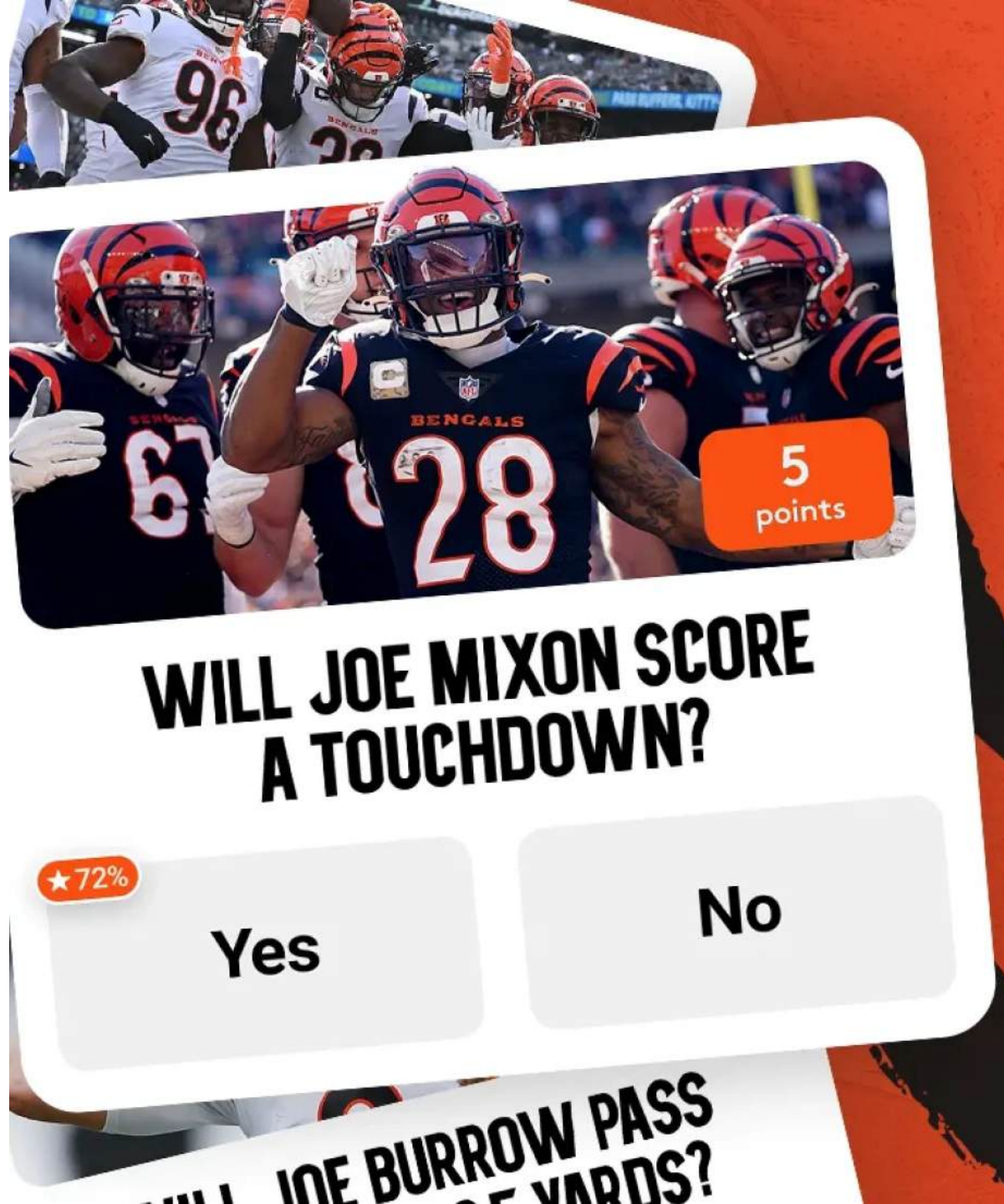
Fans consume this content by predicting scores, line-ups, teams and can help with customer acquisition and retention.

By incentivising daily interactions, operators can build a positive feedback loop, giving lower value customers a reason to keep coming back to bet, while at the same time rewarding the loyalty of their most valuable customers.

Cincinnati Bengals x Low6



- App-based prediction game involving fantasy football, team line ups and match stats to engage fans
- Based upon engagement rates and scores, fans are entered into competitions to win tickets, merchandise and money can't buy experiences
- This helped drive engagement for the Bengals while also increasing customer acquisition and first party data for Low6



FANS WANT TO BE SPOKEN TO AS INDIVIDUALS

PERSONALISED COMMUNICATION

Personalised communication starts with knowing who attends games – season ticket holders, members and hospitality purchasers.

Tapping into transaction and mobile app usage data can help teams target fans and offer tailored offerings or promotions.

Bayern Munich x SAP



- Through various data systems, Bayern have created the 'Golden Fan Record'
- The club and its partners can now leverage this data to launch personalised, omnichannel marketing campaigns to engage fans through different channels
- Key assets involve the access to different data levels, and the right to produce the data in the first place to showcase the partners' tech capabilities



FANS CRAVE UNIQUE EXPERIENCES AND CONTENT

MONEY-CAN'T-BUY EXPERIENCES

Creating unique experiences for fans through the club can provide brands with the ability to drive acquisition and reward customer loyalty.

This is commonplace in music and entertainment but is increasingly seen in sport, often with brands that have robust loyalty schemes such as credit cards, hotels and telecommunications.

Manchester United x Marriott



- Through their partnership with the club, Marriott offers its customers access to exclusive experiences.
- This includes access to a range of talent for content and events as well as physical experiences and spaces. The brand have also used the club's IP to create themed suites at local hotels in Manchester.
- This includes the "Suite of Dreams", giving fans the chance to wake up in Old Trafford on match day from the comfort of a suite transformed into a Marriott Hotels guest room overlooking the pitch





3.3

TARGET NEW CATEGORIES

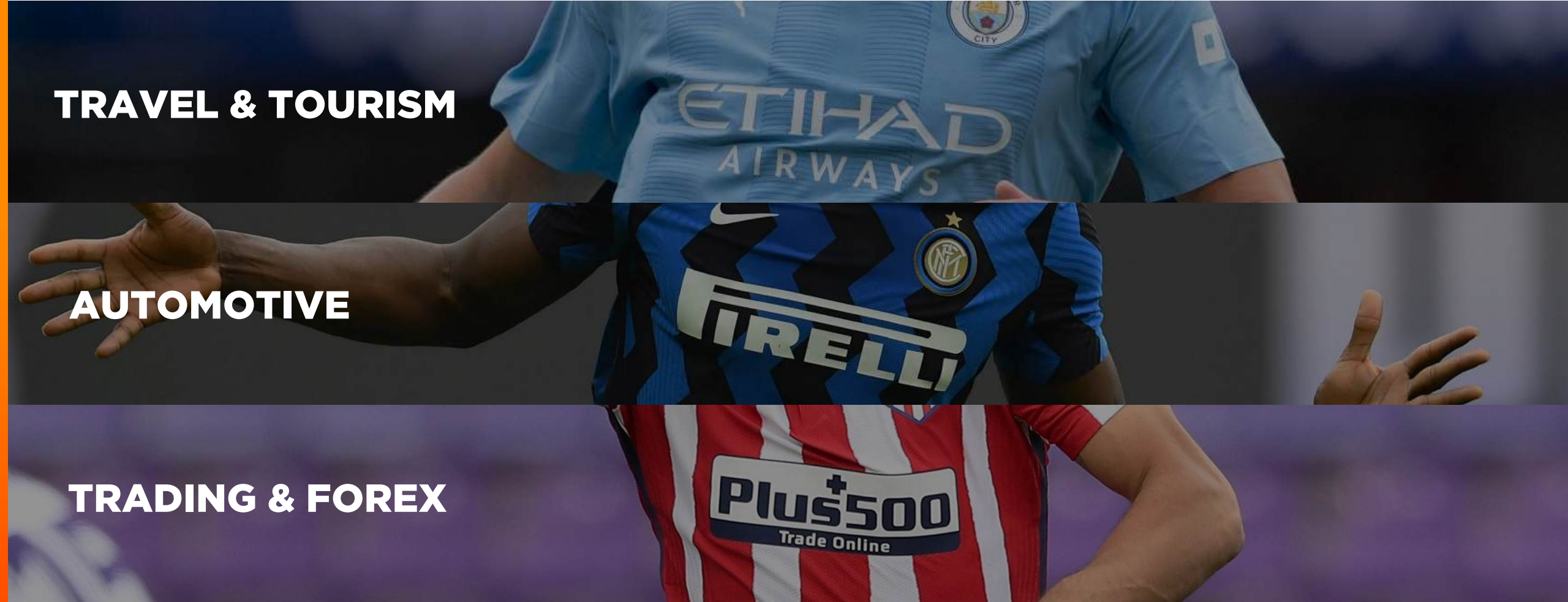


CLUBS SHOULD LOOK OUTSIDE OF BETTING AND FIND NEW SOURCES OF REVENUE



Clubs should explore potential new categories to add to their partnership portfolio which can supplement or replace revenue at risk from the betting restrictions.

Analysis of club portfolios in the league highlights three common categories that are prevalent in other football leagues that could present a good opportunity.



TRAVEL & TOURISM

AUTOMOTIVE

TRADING & FOREX

TRAVEL & TOURISM PROVIDES GREAT OPPORTUNITIES FOR STORYTELLING



Travel & tourism brands spend over €1.4bn in sport partnerships, with 51% of deals focusing on team deals and most of which in football. The most common subcategories are airline, automotive and travel booking platforms, with assets ranging from highly visible shirt branding, to storytelling around travelling around Europe



Marriott Bonvoy x Manchester United

Marriott Bonvoy leveraged their partnership with Manchester United to create the 'Suite of Dreams' inside Old Trafford. Fans could win a sleepover experience which included an exclusive tour of the training ground, Old Trafford and the museum, as well as matchday tickets and dining with a Manchester United legend.

Fee: €2.9m



TUI x Ajax

Recently renewed their partnership and handle all of Ajax's international travel. TUI also appear on the front of Ajax youth shirts. The partnership allows TUI to showcase their travel offerings to fans through social campaigns and surprise and delight content.

Fee: €562k



Mauritius Tourism x Liverpool

Mauritius Tourism has been a partner of Liverpool since 2020. Fans are given the chance to win holidays through competitions and accumulating loyalty points. Mauritius are visible on Liverpool's LED boards and they have also launched a football academy in Mauritius.

Fee: €1.8m

AUTOMOTIVE BRANDS CAN DIFFERTIATE THEMSELVES THROUGH SPORT



Automotive brands are spending over €375m in sponsorship in EMEA, with tyre brands also investing heavily on top of this. Football is the most invested in sport by automotive brands, and second in the tyre category only behind motor racing. Assets range from global and regional partners to on kit assets to generate cut through in a competitive market.



Severs Breeman BMW & MINI x Feyenoord

This partnership supplies the team with BMW cars, while also aligning values between the two brands. It aims to make Feyenoord more sustainable, while proving Severs Breeman the opportunity to align with one of the biggest clubs in the Netherlands and in their key market, driving credibility and sales.

Fee: €233k



Linglong Tires x VfL Wolfsburg

Sleeve sponsorship of Wolfsburg but also 'Official Climate Partner' as part of the club's 'We For Tomorrow' campaign. Linglong Tire also feature on main club assets, as well as across social media content series and streams. The brand will use Wolfsburg's reach to showcase their climate initiatives in market that is traditionally bad for the environment.

Fee: €2.3m



Hyundai x Atlético de Madrid

Hyundai appear on Atlético's sleeve and the partnership strategy is underpinned by fan engagement. 'For the Fans' is a campaign led by Hyundai which allows fans to participate in challenges to win exclusive prizes/experiences, while engaging with Hyundai's brand and brand strategy. Atlético also have a tyre partnership, demonstrating how the category can be carved up.

Fee: €5.1m

TRADING & FOREX BRANDS NEED FANS TO BETTER UNDERSTAND THEIR OFFERING



ONLINE TRADING AND FOREX IS A MAJOR CATEGORY ACROSS EUROPEAN FOOTBALL, APPEARING ACROSS JERSEYS BUT ALSO AS GLOBAL PARTNERS. ONLINE TRADING COMPANIES' MAIN AIM IS TO DRIVE TRUST AND CREDIBILITY, WHICH IS OFTEN WHY THEY PARTNER WITH FOOTBALL CLUBS. DUE TO A COMPETITIVE MARKET, NUMEROUS BRANDS OFTEN INVEST IN SPONSORSHIP AS A WAY OF STANDING OUT.



eToro x Premier League Clubs

eToro had a challenge to position themselves as a global leader in bitcoin trading. As a result, they partnered with a range of European football clubs for four key reasons – global brand realignment, high-density marketing platform, global PR coverage, market leading brand positioning. Following the success of this, they aim to continue to expand across different football markets

Fee: €0.5k - €2m



Libertex x Bayern Munich

Libertex used player access to release a campaign with players linking key values that link football to trading. They also benefit from LED branding, as well as handing handling contracts for difference and foreign exchange trading.

Fee: €1.4m



Trive x Bayer Leverkusen

Trive is in its second season as sleeve sponsor of Bayer Leverkusen. The partnership focuses on mass awareness through the sleeve asset and aligning with Bayer's community ethos to instil trust in the brand.

Fee: €2.3m



04

PLAN IN ACTION



THERE ARE THREE STEPS CLUBS CAN TAKE

To prepare for the incoming restrictions, clubs can take a few important steps to reduce the risk of revenue loss.

STRATEGIC APPROACH

1. Analysis of Sponsorship Portfolio

2. Develop Club Mitigation Strategy

3. Create Implementation Plan



AZ ALKMAAR | CASE STUDY

The club has two partners in the category, including the front-of-shirt asset.

Main Partners



Sportswear

KANSINO

Gambling

AFAS
software

Business Software

CAVALLARO
NAPOLI

Clothing



Telecom

elfi

Property
Development



Accommodation

Partners & Suppliers

UNIBET

Gambling



Construction

AMSTEL

Alcohol

INNOVA
energie

Energy

ZEMOVI

Automotive

Echte
Boter

FMCG

etoro

Trading

balans
Dieren met karakter

Home Services



MITIGATION STRATEGY

AZ Alkmaar could adopt the following strategies to mitigate against potential revenue lost through the betting regulations affecting their front of shirt partner, Kansino.

1. RENEGOTIATE EXISTING BETTING DEALS

- Existing front of shirt partner, Kansino, could pivot to an alternative package, pending availability and other contracts.
- Identifying brand objectives would help to define where to uplift other assets and identify opportunities for creating new assets, in collaboration with partner brands.

2. CREATE VALUE THROUGH NEW ASSETS

- The club could investigate new asset creation that can drive collection and utilisation of fan data.
- The club would need to ensure they had the necessary resources to implement new plans (e.g. technical infrastructure, human resource, agency support etc).
- Such initiatives could be used for personalised targeting and communications which incumbent and new partners could access and which could be sold as an asset with potential to increase in value over time.

3. TARGET NEW CATEGORIES

- The club could look at open categories in their portfolio to identify potential new partner opportunities to mitigate against lost revenue.
- Portfolio gaps in Travel and Trading/Forex present an opportunity to go to market
- This would require sufficient internal or third-party resources to create a go-to-market strategy and sales process.

LEAGUES CAN DRIVE FINANCIAL SUSTAINABILITY & INNOVATION FORWARD

As a common club issue, leagues have a role to play in supporting clubs to prepare for the future and develop their businesses. There are examples of how other sporting leagues have found success in a collaborative approach to support the wider sport.



LaLiga Impulso



CVC and LaLiga's strategic partnership included an investment of €2bn to be shared across participating clubs for projects that accelerate their professionalisation and development.

Clubs must allocate 70% of investment into infrastructure & modernisation projects that will enhance revenue streams.

So far clubs have used the funds to improve stadium and training facilities, as well as investing into digital transformation initiatives. LaLiga have also identified startups to accelerate innovation across the league as well as procure centralised technology for clubs.



NBA's initiative to source, evaluate, and pilot emerging technologies that advance the NBA's top basketball and business priorities

The goal of the program is to attract talented entrepreneurs and companies that can innovate the NBA ecosystem and create new revenue streams

Priority areas are focused around growing the game and improving fan experience – particularly involving technology and content.




KEY TAKEAWAYS

- 1 Gambling-related companies contribute a significant share of partnership revenue in the Netherlands
- 2 Clubs and leagues are faced with betting restrictions from July 2025
- 3 Mitigation could come in the form of renegotiation, asset value creation & new categories
- 4 Strategic support at club and league level could help towards mitigation of potential revenue losses



**So, how
can we help you?**

**Looking forward to
working together!** 



THANK YOU

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