



# Germany Marketing Overview



# GiG in brief

## Mission

"To drive sustainable growth and profitability of our partners through product innovation, scalable technology and quality of service."



**Dual-listed** on Oslo Børs and at Nasdaq Stockholm



**Over 25** primary countries targeted by Media assets



**€65m (approx.)**  
Market Cap



## Offices

in Malta, Denmark & Spain

## 8 Global Platform Licenses

**US:** New Jersey & Iowa  
**ROW:** Malta, UK, Sweden, Spain, Romania, Croatia, +8 additional in integration pipeline

# Market Overview

**83m**  
population

**€3.7bn**  
GGR 2020 \*H2

**€44445**  
GDP/Capita

Limits  
**€1000**  
a month  
(cross brand)

**Schufa**  
Verification  
requirement

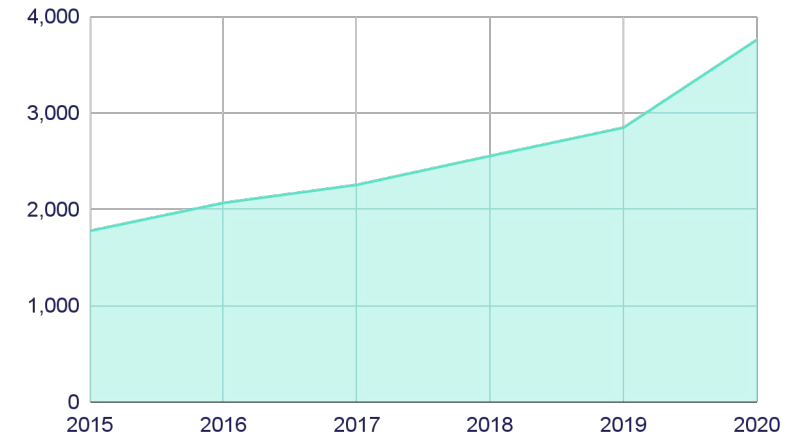
**Oasis**  
Self-exclusion  
register  
requirement

**88%**  
Internet  
penetration

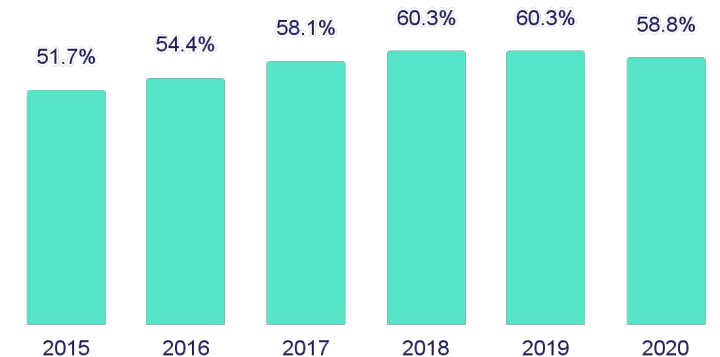
**86.5%**  
aged 18+

- 73% of total population own a smartphone
- 5 hrs 43 mins average daily internet usage
- 66m social media users
- A Growing market even prior to Covid
- Increased % Onshore

Market Growth % 2015-2020



Onshore % 2015-2020



# The Regulator



**The German Central Regulator** will not be functional until after several months following the launch of IST2021. . In the meantime, the states have agreed that **Hesse will be the state responsible for receiving online gambling licence applications.**

Until the central authority is in place, each state will continue to have split responsibilities to regulate gambling within their own state, and there will be central authorities that continue to deal with payment blocking and advertising across Germany.





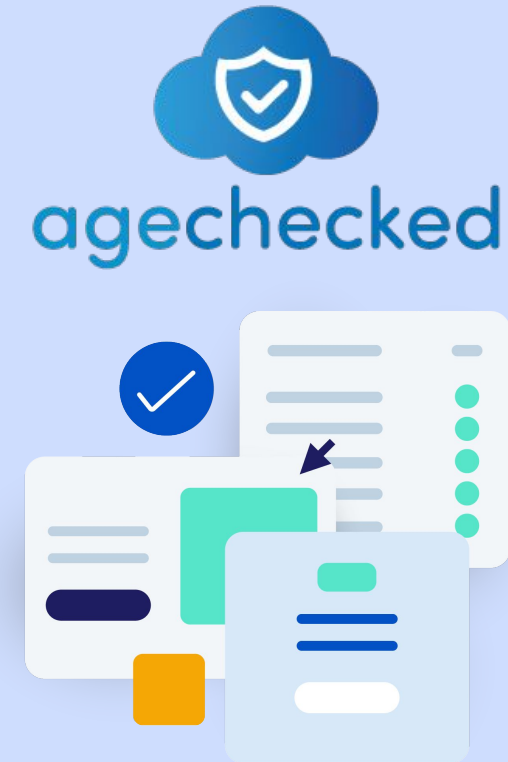
# Schufa Integration

- **Schufa** is a central place where information about a consumer is sourced from utility suppliers, banks, internet providers & more.
- In order to **validate the player registering** on the gaming website, a 3rd party call to Schufa on registration is made.
- For the player's account to pass Schufa KYC, Schufa needs to return a minimum of **85% match** on First and Last Name AND a **100% match** on date of birth.
- In the case that SCHUFA returns a fail, the player can be active for a period of 72h from registration and deposits can be done up to €100 before the players account is subject to manual **KYC verification**.



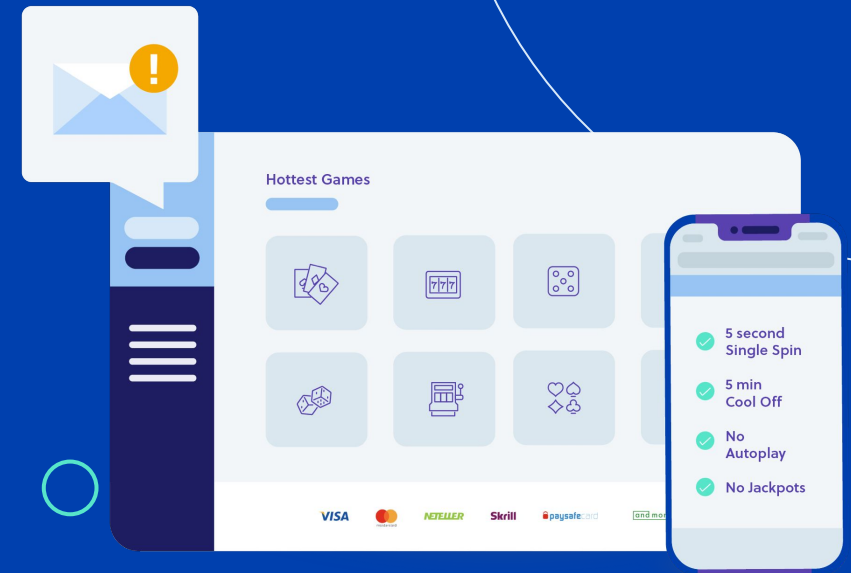
# Oasis Integration

- Oasis is the German **self exclusion** register.
- On each registration and login, **each player is checked** against the Oasis Self exclusion register.
- Player can choose to self exclude on the gaming website which will be sent to Oasis or directly via Oasis.
- In order for *AgeChecked* to complete the Oasis integration, *AgeChecked* **require API keys** directly from each operator. Each operator must complete the necessary registration forms with Oasis directly and obtain such information.



# Gaming Requirements

- No free to play games when logged out
- Player is only allowed to have **one game session** open at a time.
- Reality check notification every **60 minutes**
- **5 minute cool off period** after reality check confirmation
- A Spin must last at least 5 seconds. Single spin allowed in those 5 seconds.
- A stake may **not exceed one Euro** per game.
- No Autoplay and No Jackpots permitted



# Limits

- **100 Euro limit** if player is not KYC verified. This is a lifetime limit.
- Upon registration, players must be asked to set a domain-related individual monthly deposit limit of a **maximum of €1,000**
- Players must at all times be given the opportunity to set up domain-related daily, weekly or monthly bet, deposit and loss limits.
- If a player wishes to increase the limit, the increase will only take effect after a **7 day cool off**.
- If limits are reduced, the new limits will take effect immediately.





# Payment Solutions —

- **Approved methods by the regulators for licensed operators (so far):**

- SEPA - Sofort / Klarna, Trustly, Giropay, Onlineüberweisen
- Online wallet - Paypal
- Card Acquiring - Visa & Mastercard

- **Other methods / providers subject to new regulatory approval:**

- Prepaid payment method - mypaysafecard
- Online wallet - Skrill & Neteller
- eVoucher - CashtoCode (Funanga)



# Games

| Rank | Provider        | % # of bets |
|------|-----------------|-------------|
| 1    | Play N Go       | 35%         |
| 2    | Gamomat         | 15%         |
| 3    | Pragmatic Play  | 12%         |
| 4    | Microgaming     | 5%          |
| 5    | Push Gaming     | 4%          |
| 6    | Netent          | 4%          |
| 7    | Red Tiger       | 3%          |
| 8    | Relax Gaming    | 3%          |
| 9    | Big Time Gaming | 2%          |
| 10   | Yggdrasil       | 2%          |
| 11   | Nolimit City    | 1%          |
| 12   | Playson         | 1%          |
| 13   | Thunderkick     | 1%          |
| 14   | Quickspin       | 1%          |
| 15   | ELK             | 1%          |

| Rank | Provider        | % of turnover |
|------|-----------------|---------------|
| 1    | Play N Go       | 22%           |
| 2    | Pragmatic Play  | 20%           |
| 3    | Gamomat         | 16%           |
| 4    | Evolution       | 9%            |
| 5    | Microgaming     | 5%            |
| 6    | NetEnt          | 4%            |
| 7    | Relax Gaming    | 3%            |
| 8    | Push Gaming     | 3%            |
| 9    | Big Time Gaming | 2%            |
| 10   | Red Tiger       | 2%            |
| 11   | Nolimit City    | 2%            |
| 12   | Playson         | 2%            |
| 13   | Yggdrasil       | 1%            |
| 14   | ELK             | 1%            |
| 15   | Thunderkick     | 1%            |

# Pricing for Germany

*New customers only*



|                  |   |
|------------------|---|
| PAM setup        | €50K  |
| Frontend setup   | €95K  |
| Sports setup     | €50K  |
| NGR Revshare     | 5%  |
| Monthly mins     | 0-3 months: €10K<br>4-6 months: €25K<br>7+ months: €40K |
| Hosting          | €7.5K per month   |
| CMS              | €5K per month   |
| Logic            | €2.5K per month   |
| SQL Connectivity | €5K per month   |
| Managed Services | AOR   |

# GiG platform

## Leading full-service platform

Our platform is at the core of our business, it's built for innovation, to be adaptable to change and to provide a top-class customer experience and user journey.

Built to deliver in regulated markets, GiG's platform is integrated with the leading payment providers and is configurable with the major content providers.

It boasts a unique frontend experience and is built mobile-first to ensure that operators can provide their players with the same quality across all devices. Featuring real-time data, GiG's platform provides operators with instant actionable insights, which allows them to make smarter business decisions about the future.



# The Omnichannel approach

## Providing an uninterrupted user experience

Specialising in bringing land-based operators online, we offer a true omnichannel solution, allowing operators to combine your retail and digital sites through shared wallets and loyalty systems, and dual registration.

Our Omnichannel solution provides players with a unique, seamless user experience when moving between your retail and digital operations.

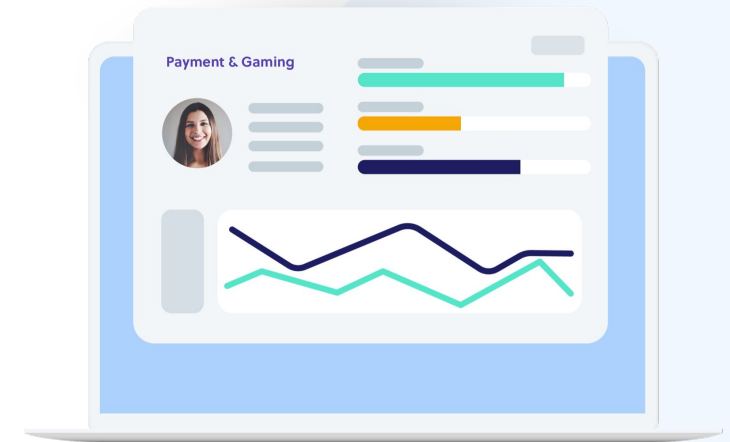


# Managed Services

## Standing with our partners every step of the way

At GiG, we support our partners with both a dedicated account manager and an integration manager that will work together, during the onboarding phase, and also after go live so that products and services, and relationships continue to evolve.

GiG offers a full suite of managed services (27/7 customer support, content management, player protection, media services etc) that provide operators with what you need and when you need it via an experienced team of experts.



# Sportsbook

## The adaptable sportsbook solution








Designed mobile-first, our optimised sportsbook comes complete with over the counter retail betting and offers a wide range of digital content and sports events, which can be localised so allowing operators to adapt to their target market.

Operators can benefit from our sportsbook independently, or they can choose to integrate it with our platform solution.

Featuring flexible Betslip solution, real-time scoreboards, a comprehensive in-play offering and a suite of virtual sports betting options via our casino solution, our sportsbook supports all sport betting needs.



# Our iGaming Solutions

-  Platform (PAM)
-  Sportsbook
-  Omnichannel
-  Managed services
-  CMS
-  Frontend
-  Logic
-  Data





# Continuous new market assessment

At GiG, we are continuously assessing the market to help us gain valuable insights in terms of regulation, shifts in the economy, market trends and player traits and behaviours.

This helps us to continue to adapt and enhance our platform solutions to ensure they remain as market leading products. .



# Get in touch

Contact our sales team: [sales@gig.com](mailto:sales@gig.com)

