

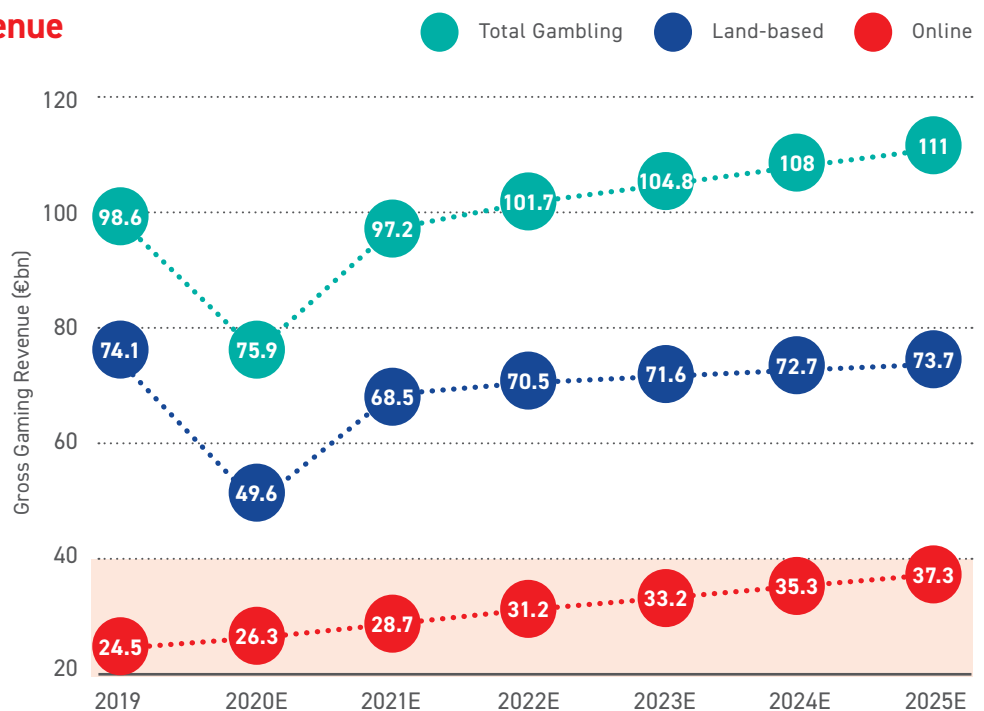
# European Online Gambling Key Figures 2020 Edition

## Gambling market revenue

In 2019, the total European gambling market was worth €98.6bn, with online gambling accounting for €24.5bn and land-based gambling accounting for €74.1bn in gross gaming revenue. In 2020, total gross gaming revenue is expected to drop by 23% to €75.9bn because of the impact of COVID-related closures on land-based gambling, while online gambling revenue is expected to increase by 7% to €26.3bn gross gaming revenue and grow steadily to reach €37.3bn.

\* EU-27 and UK markets only

Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)



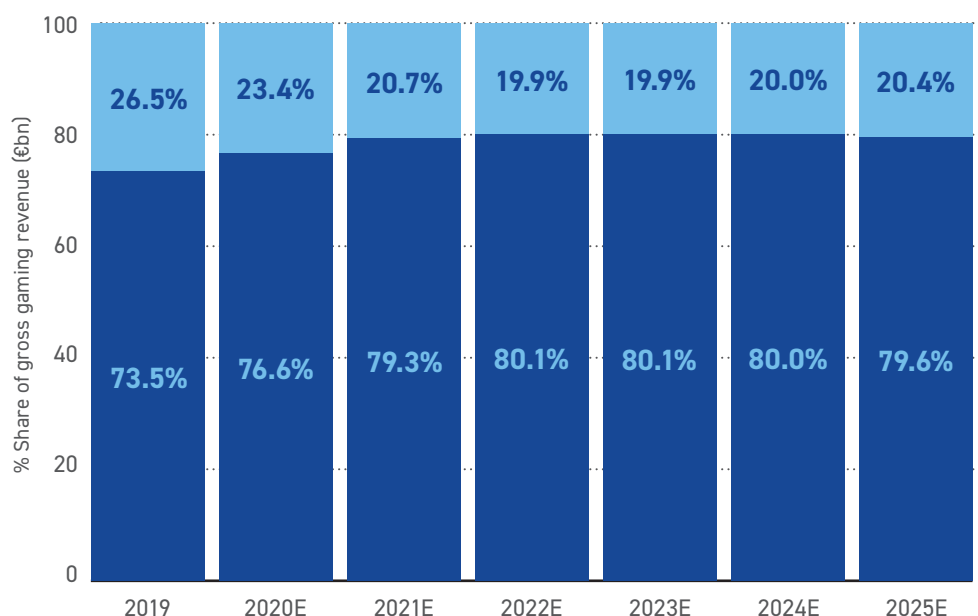
## Regulated online gambling market is growing

In 2019, Europe had an online gambling market channelling rate of 73.5%, meaning that nearly three quarters of online gambling activity took place in the regulated market, while 26.5% of activity took place in grey and black markets. The share of online gambling taking place in the regulated market is expected to increase to 80.1% by 2022 and then decrease slightly to 79.6% by 2025.

■ Regulated market  
■ Grey and black markets

\* EU-27 and UK markets only

Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)

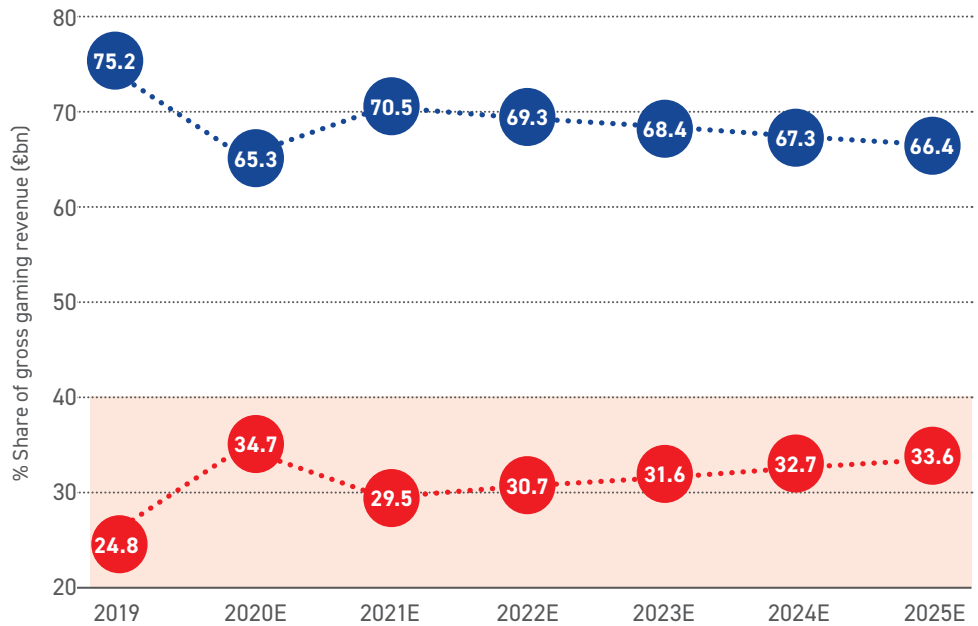


## Online share of total gambling is growing steadily

The market share of online gambling is growing steadily and is expected to reach 33.6% of Europe's gross gaming revenue by 2025. In 2020, the share of online gambling is expected to momentarily increase to 34.7% of total gross gaming revenue as COVID-related closures reduce land-based gambling. The online share is then expected to dip to 29.5% in 2021 as land-based establishments reopen.

- Land-based
- Online

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Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)

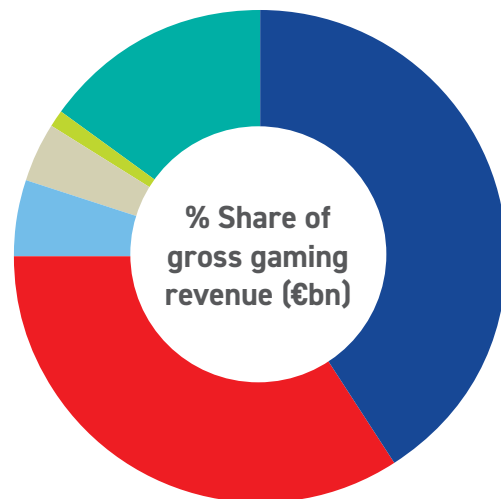


## Sports betting is Europe's most popular activity

Sports betting continues to be the most popular online gambling activity, with a 41% share of Europe's online revenue and worth €10bn in gross gaming revenue in 2019.

- Sports Betting 41%
- Casino 34%
- Poker 5%
- Bingo 4%
- Other / Skill Gaming 1%
- Lottery 15%

\* EU-27 and UK markets only  
Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)

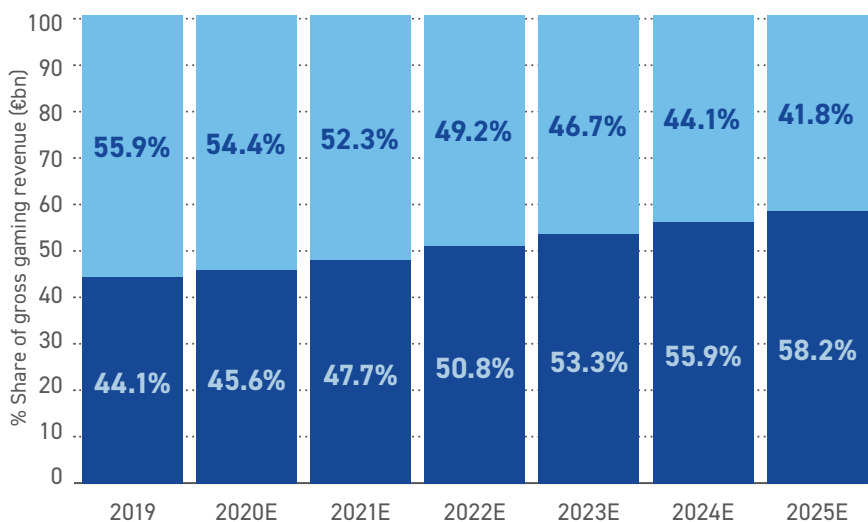


## Online gambling is going mobile

In 2019, 55.9% of Europe's online bets were placed from a desktop computer, while 44.1% of online bets were placed from mobile devices. A shift to mobile betting is expected, with mobile reaching 58.2% of all online bets by 2025.

- Mobile Devices (phones and tablets only)
- Desktop

\* EU-27 and UK markets only  
Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)



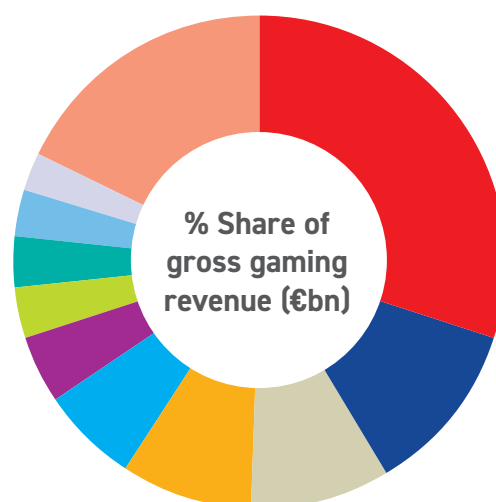
## The UK is the biggest online market

In 2019, the UK (30.1%) accounted for the largest portion of Europe's online gambling market revenue. Germany (11.4%), France (9.2%) and Italy (8.7%) were the next biggest national markets.

United Kingdom	30.1%	Finland	3.5%
Germany	11.4%	Denmark	3.2%
France	9.2%	Belgium	3.0%
Italy	8.7%	Ireland	2.6%
Sweden	6.2%	Other countries combined	17.6%
Spain	4.5%		

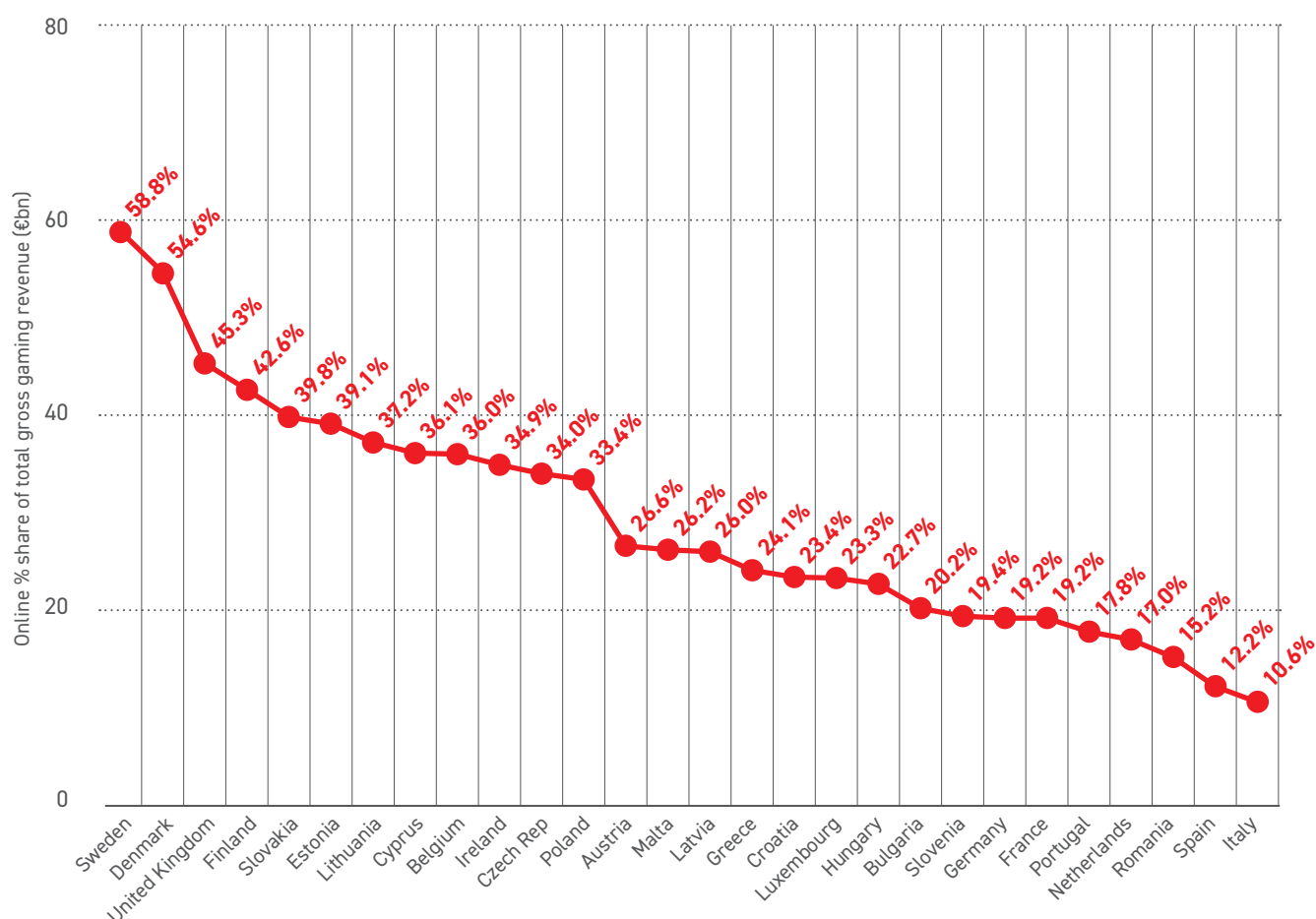
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Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)



## Big differences in the online share of national gambling markets

In 2019, Sweden was the European country which had the highest share (58.8%) of its gambling activity taking place online, followed by Denmark (54.6%), UK (45.3%), Finland (42.6%) and Slovakia (39.8%). Interestingly, some of the larger gambling markets such as Germany, France, Italy, and Spain had relatively low online shares of their total gambling markets.



\* EU-27 and UK markets only

Source: H2 Gambling Capital [www.h2gc.com](http://www.h2gc.com)

## EGBA members: Key Figures (2019)

**bet365**

betsson group

**Σntain**

**kindred**

*William***HILL**

### Licenses and offices

 Online gambling licenses

 Members offices



\* All EGBA members data is for the 2019 year and covers online gambling in EU-27 and UK markets only.



## Customers

- A total of **16 MILLION ONLINE CUSTOMERS**
- Customers placed **44 BILLION ONLINE BETS**, an increase of 39% from 2018
- The value of customers bets was **WORTH €111 BILLION**, an increase of 17% from 2018
- With **CUSTOMERS WINNING 94.3% OF THEIR BETS**, an increase from 93% in 2018
- Which was **WORTH €105 BILLION IN WINNINGS**, an increase of 18% from 2018



## Revenue

- Combined **€5.6 BILLION ONLINE GROSS GAMING REVENUE**<sup>1</sup> an increase of 4% from 2018
- Representing **23% OF THE EUROPEAN ONLINE GAMBLING MARKET REVENUE**



## Investment in European sports

- **INVESTED €107.1 MILLION IN EUROPEAN SPORTS THROUGH SPONSORSHIPS** of European sports federations, leagues, clubs, and events, an increase of 25% from 2018
- Contributed **€233 MILLION IN STREAMING RIGHTS PAYMENTS TO EUROPEAN SPORTS** to televise various sports on members' websites, an increase of 76% from 2018



## Products

- Combined **55% OF GROSS GAMING REVENUE FROM SPORTS BETTING**
- Sports betting share of **55% IN-PLAY AND 45% PRE-MATCH BETTING**

1. Gross Gaming Revenue is the net profit of a company – the amount of money customers bet (€111 billion) minus the amount of money customers won (€105 billion) – and company costs.

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## Regulatory compliance

- A total of **145 LICENCES HELD ACROSS 17 EU COUNTRIES** to provide online gambling services
- **45 LICENSING AUDITS** completed
- Subject to **25 ANTI MONEY-LAUNDERING AUDITS**
- Completed **49 AUDITS ON IT SECURITY**
- At least **548 CYBER ATTACKS PREVENTED TO PROTECT CUSTOMER DATA**
- **EMPLOYED 965 DEDICATED COMPLIANCE EXPERTS** in KYC, customer due diligence, anti-money laundering, fraud prevention and betting integrity
- At least **1.8 MILLION CUSTOMER ACCOUNTS CLOSED** due to failure to verify identity, age requirements, anti-money laundering, fraud prevention or betting integrity concerns
- **REPORTED 1000 SUSPICIOUS FINANCIAL TRANSACTIONS** to financial regulators



## Safer gambling

- Conducted **1.2 MILLION DIRECT INTERVENTIONS WITH CUSTOMERS TO PROMOTE SAFER GAMBLING** an increase of 50% from 2018
- **63% OF CUSTOMERS USED A SAFER GAMBLING TOOL<sup>2</sup>** such as a reality check, deposit limit, or time limit, an increase from 37% of customers in 2018
- **HELPED TO PROTECT SELF-EXCLUDED CUSTOMERS BY CLOSING 800,000 CUSTOMER ACCOUNTS**, either temporarily or permanently<sup>3</sup>



## Employment

- Sustained **43,000 EUROPEAN JOBS**
- Europe-wide with **OFFICES IN 17 EUROPEAN COUNTRIES**
- **27 DIFFERENT EUROPEAN NATIONALITIES** employed
- All **24 OFFICIAL EU LANGUAGES** represented in our workforce

2. The share of unique customers who used a safer gambling at least once, either voluntarily or mandatorily as part of the betting company or regulatory requirements in certain countries.

3. Customer accounts, including cross-brand.

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