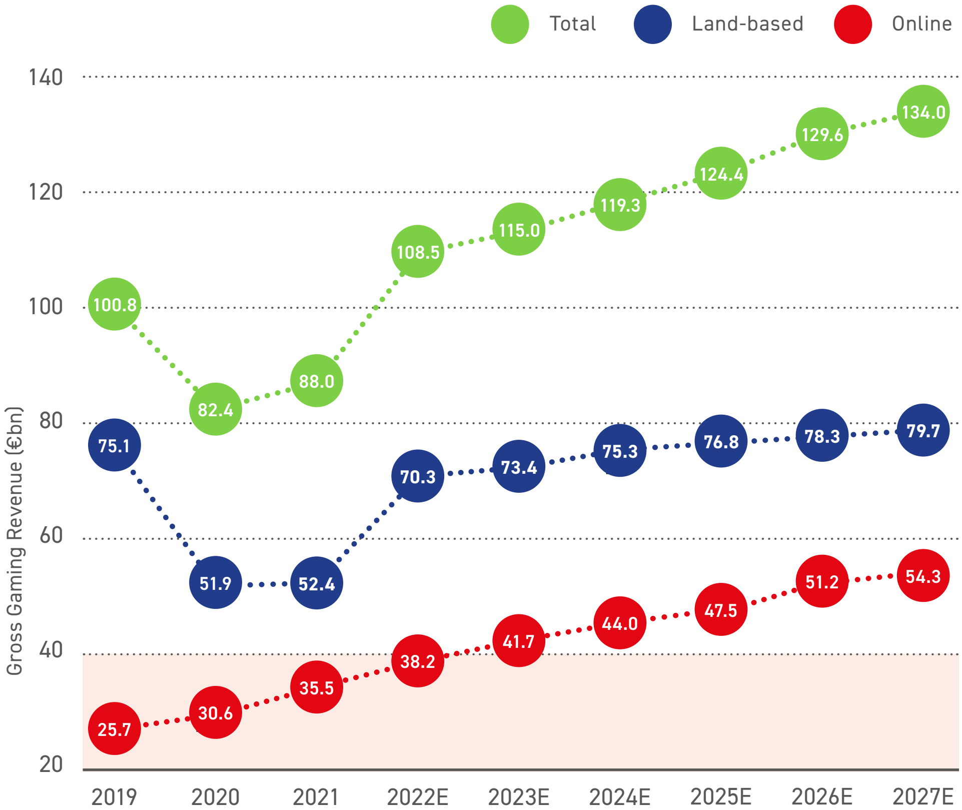
EGBA | European Gaming & Betting Association

European Online Gambling Key Figures 2022 Edition

Europe's gambling market revenue

Europe's gambling market revenue stabilised in 2022 and reached €108,5bn gross gaming revenue, an 8% increase compared to pre-pandemic levels in 2019 and a 23% rise compared to 2021. This growth was driven mainly by the reopening of land-based gambling venues following the pandemic, with land-based gross gaming revenue increasing 34% to €70,3bn in 2022, accounting for 65% of total gambling revenue. Meanwhile, online gambling revenue increased by 8% to €38,2bn gross gaming revenue, or 35% of Europe's total gambling revenue.

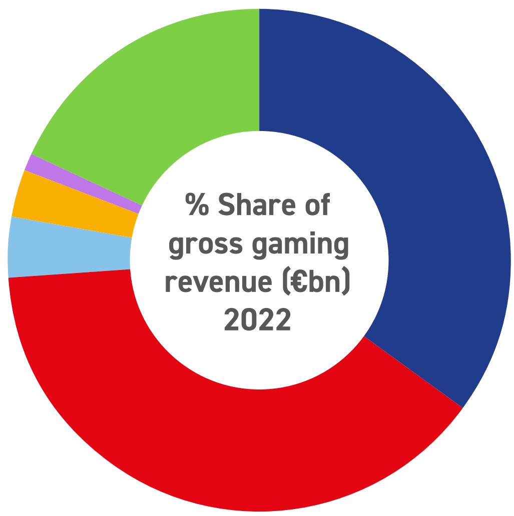


*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

Most popular online gambling products

In 2022, casino was Europe's most popular online gambling product by revenue, reaching €14,9bn gross gaming revenue and accounting for 39% of Europe's online gambling revenue. Sports and other types of betting were close behind, generating €13,6bn in gross gaming revenue and accounting for 35% of Europe's total online gambling revenue. Comparatively, EGBA members generate the biggest share (46%) of their online revenues from sports betting.

Sports and other betting	35%
Casino	39%
Poker	4%
Bingo	3%
Other / Skill Gaming	1%
Lottery	18%



*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

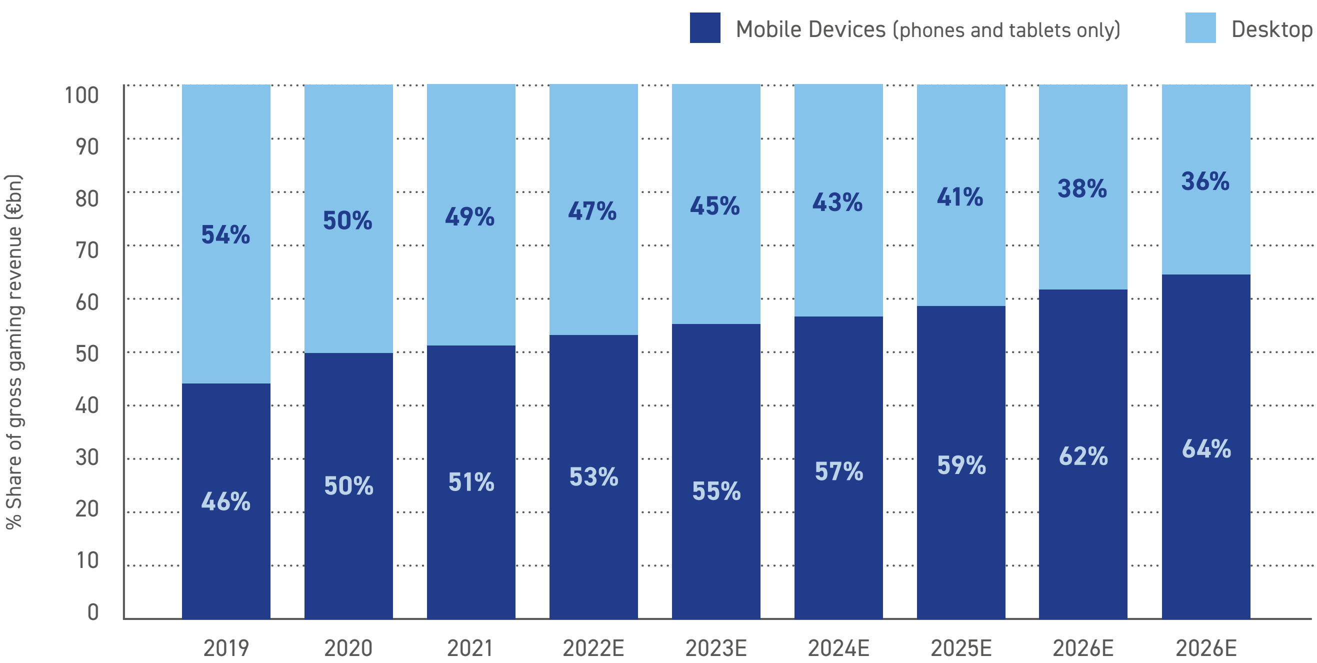
Online gambling products outlook

Online gambling products outlook	2019	2020	2021	2022E	2023E	2024E	2025E	2026E	2027E
Gross Gaming Revenue (€bn)									
Horseracing	1,8	2,0	2,1	2,0	2,0	2,1	2,2	2,2	2,2
Sports / Other	7,7	8,2	10,8	11,6	12,7	13,9	15,2	16,6	17,9
Total betting	**9,5**	**10,3**	**12,9**	**13,6**	**14,8**	**16,0**	**17,3**	**18,9**	**20,0**
Casino	9,9	12,1	13,6	14,9	16,0	16,2	17,2	18,3	19,0
Poker	1,2	1,7	1,5	1,4	1,4	1,4	1,4	1,4	1,4
Bingo	1,0	1,0	1,1	1,1	1,2	1,2	1,3	1,4	1,4
Other / Skill Gaming	0,4	0,4	0,4	0,4	0,5	0,5	0,6	0,6	0,6
Total gaming	**12,4**	**15,2**	**16,6**	**17,9**	**19,2**	**19,4**	**20,5**	**21,6**	**22,5**
Lottery	3,8	5,1	6,1	6,7	7,7	8,7	9,7	10,7	11,7
Total online gambling	**25,7**	**30,5**	**35,5**	**38,1**	**41,7**	**44,0**	**47,5**	**51,2**	**54,3**

*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

Betting device shares

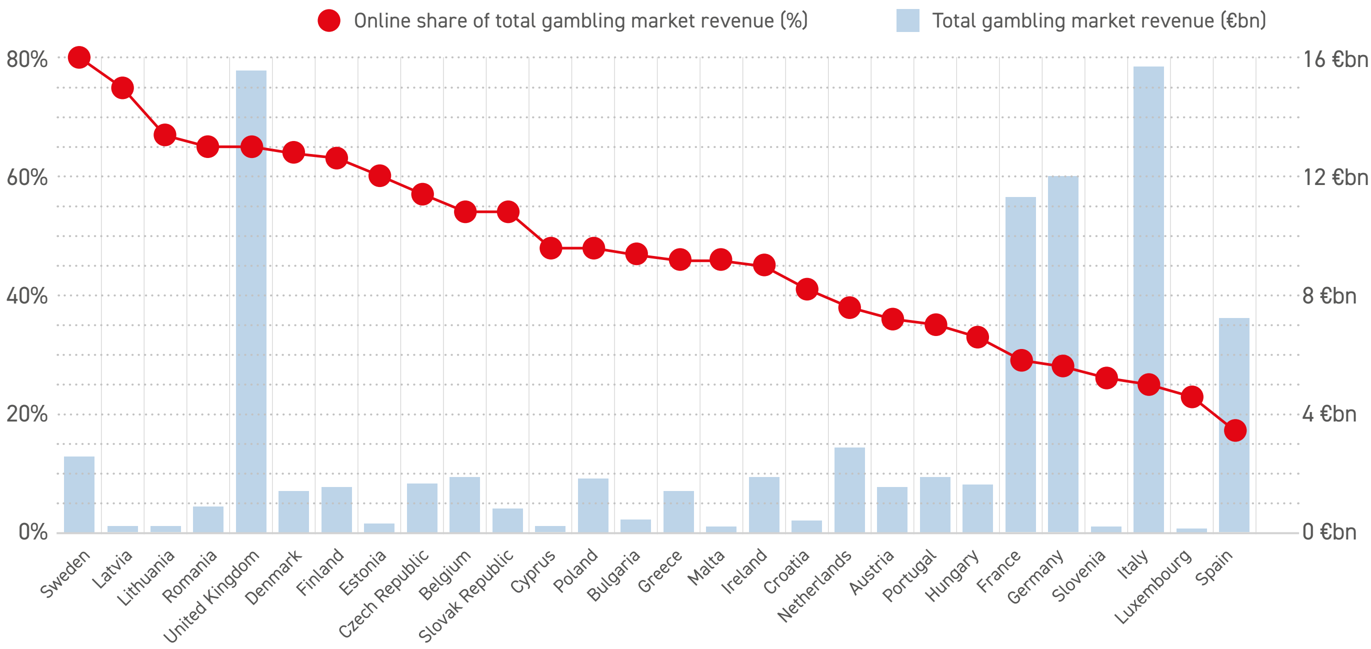
The share of Europe's online activity taking place on mobile devices (phones and tablets) continued its growth trend in 2022, with 53% of online bets placed on mobile devices and 47% of online bets placed from desktops.



*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

Online gambling shares of national gambling markets

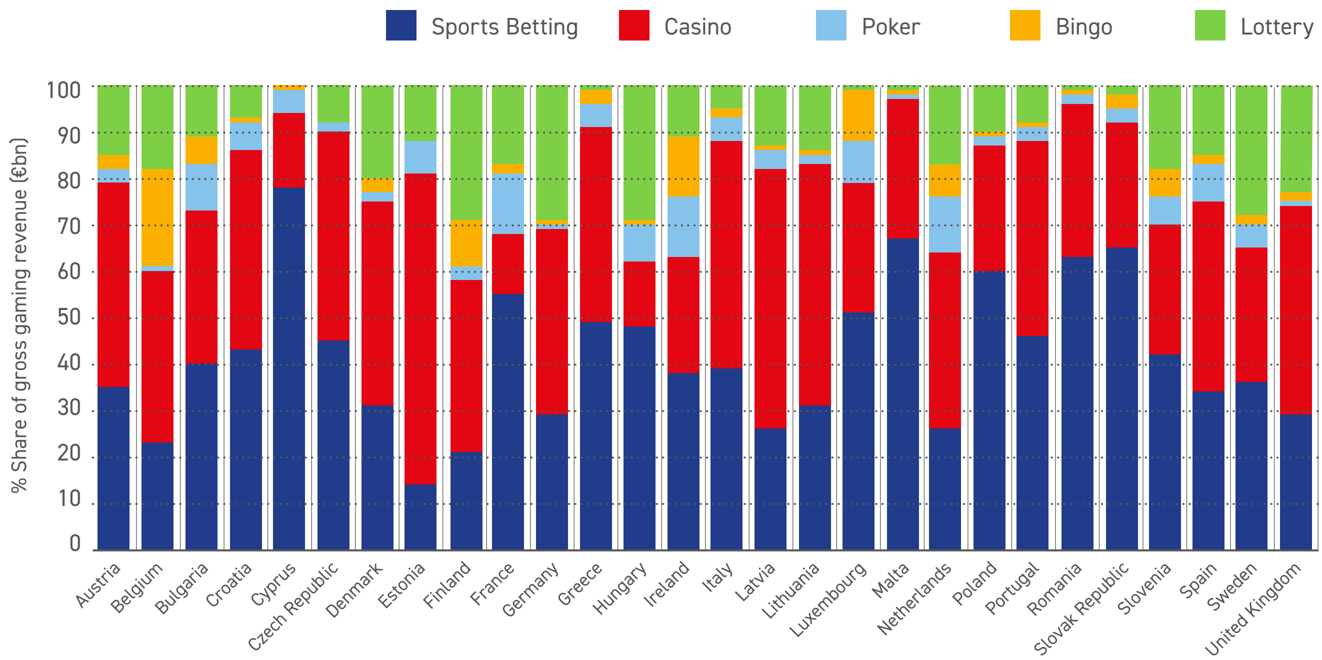
Significant differences exist in the online shares of the different national gambling markets in Europe. In 2021, Sweden was the European country with the highest share (80%) of its gambling activity taking place online, followed by Latvia (75%), Lithuania (67%), Romania (65%) and the UK (65%). Notably, many countries that have much larger gambling markets, by revenue, such as Spain, Italy, Germany, and France, still had a relatively low online share of their respective gambling markets.



*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

Online gambling product shares of national gambling markets

The online gambling product shares in Europe's different national gambling markets vary considerably. In Cyprus, online casino games and poker are both prohibited, but both products collectively accounted for 21% of the country's gross gaming revenue (all offshore). In France, online casino games are not permitted but accounted for 13% of the country's gross gaming revenue (all offshore).



*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

EGBA members: Key Figures (2021)

Revenue

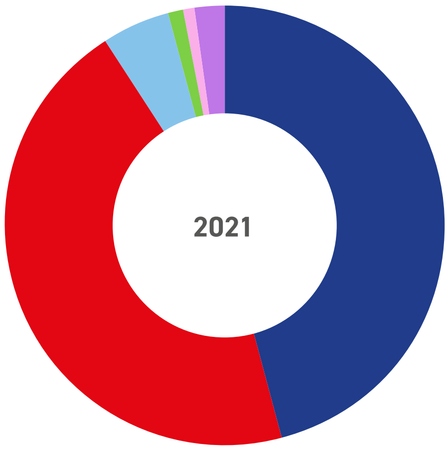
Revenue (€bn)	2020	2021
Online Gross Gaming Revenue	10.9	11.6
By product (€bn)		
Sports betting	5.0	5.3
Casino	4.6	5.2
Poker	0.7	0.6
Bingo	0.0	0.0
e-Sports	0.1	0.1
Virtual betting	-	0.1
Other	0.6	0.3

In 2021, EGBA members had a combined €11,6bn in online gross gaming revenue, a 6% increase from the previous year, accounting for 33% of Europe's total online gambling revenue that year.

*EU-27 and UK online gambling markets only.
Source: European Gaming and Betting Association (EGBA).

Revenue shares by product

Sports Betting	**46%**	E-sports	**1%**
Casino	**45%**	Virtual betting	**1%**
Poker	**5%**	Other	**2%**
Bingo	**0%**		



EGBA members generate the biggest share of their revenues from sports betting, which accounted for €5,3bn online gross gaming revenue in 2021, equivalent to 46% of their total online revenues.

*EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, December 2022.

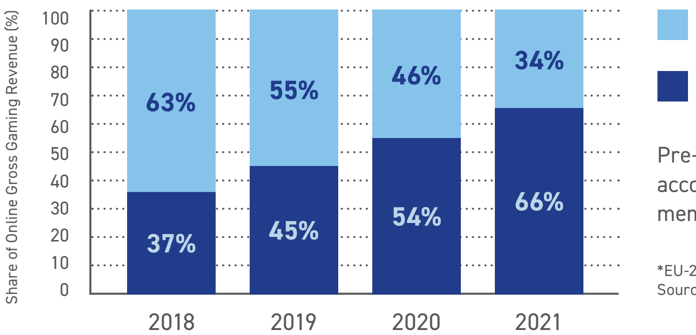
Customers

In 2021, EGBA members processed 111,6bn customer bets and stakes, with a combined value of €202,9bn. They returned €191,3 in winnings to their customers, with an average return to player rate of 94,3%.

Customers	2020	2021
Number of active** customer accounts (million)	29.0	29.8
Number of customer bets/stakes (billion) (including bonuses)	97.1	111.6
Value of customer bets/stakes (€bn) (including bonuses)	179.0	202.9
Value of customer winnings (€bn)	168.1	191.3
Return to player (RTP) rate (%)	94.0	94.3

*EU-27 and UK online gambling markets only.
**Customers who placed a bet at least once during the reporting year.
Source: European Gaming and Betting Association (EGBA).

Sports betting types



Pre-match betting on sports continues to grow and, by revenue, accounted for 66% of all online sports bets placed with EGBA members in 2021.

*EU-27 and UK online gambling markets only.
Source: European Gaming and Betting Association (EGBA).

Licensing

Licensing	2018	2019	2020	2021
Number of online gambling licenses	121	145	234	225
Number of countries where licensed*	20	17	19	21

*EU-27 and UK online gambling markets only.
Source: European Gaming and Betting Association (EGBA).

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