

The Gambling Market in Numbers 2022



The Danish Gambling Authority's review of the
developments in the Danish gambling market in
2022

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Foreword

At the Danish Gambling Authority, we want to keep our stakeholders updated with statistics on the development in the Danish gambling market. We constantly strive to improve our publications, which is why we changed our quarterly statistics in Power BI in the beginning of 2023 to become monthly statistics. Thereby, a wide range of statistics describing the gambling market is available on a monthly basis.

In “The Danish Gambling Market in Numbers 2022”, we provide an overview of the development in the Danes’ gambling spend and behaviour in 2022. Here, we review the development in the individual gambling sectors, but we also see across sectors. Some of the topics you can read about include: Danes’ spending on online gambling as opposed to land-based, when Danes’ spend the most during the 2022 World Cup, and who typically contacts the Danish Gambling Authority’s helpline StopSpillet.

I hope you will find “The Danish Gambling Market in Numbers” useful.

On behalf of the Danish Gambling Authority,



Anders Dorph
Director



Introduction

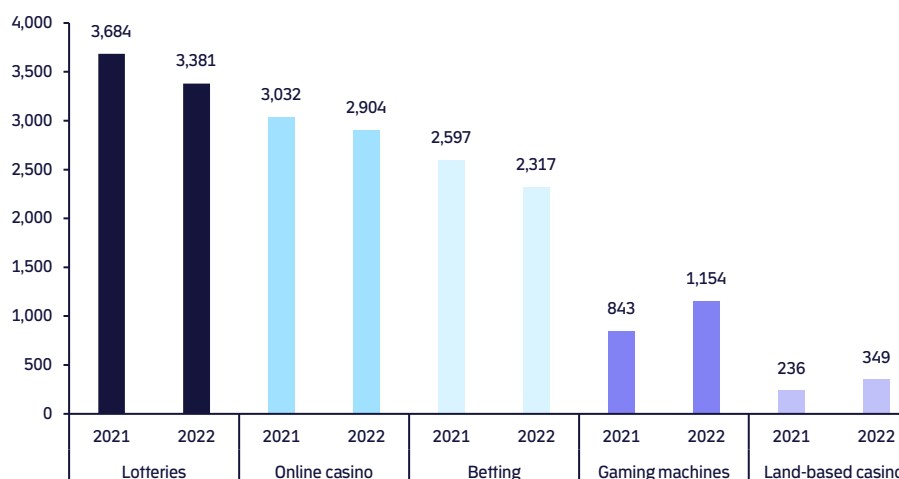
For the Danish Gambling Authority, it is a core task to continuously analyse the development in the gambling market. In “The Danish Gambling Market in Numbers”, the total statistical overview of the development in the gambling market is presented. 46 figures and tables show the development both in the individual gambling sectors (betting, online casino, gaming machines, land-based casinos and lotteries) and across and follow the development since the partial liberalisation of the gambling market in 2012. Moreover, we present statistics on ROFUS (Register of self-excluded players) and the Danish Gambling Authority’s help-line StopSpillet.

A year (almost) free from covid-19

In 2020 and 2021, Denmark was highly affected by covid-19. The gambling market was directly affected by covid-19 restrictions, when restaurants, gambling arcades and casinos were closed for some periods of time to prevent the spread of the virus. This, naturally, affected the gambling spend on the land-based gambling market. In 2022, the lockdowns lasted for a shorter while compared with the previous years, when gambling arcades and casinos were closed for no more than January. Naturally, this caused a significant rise in the GGR for gaming machines and land-based casinos.

All in all, the total GGR for the Danish gambling market in 2022 amounted to DKK 10.1 billion, which is a year-on-year fall of DKK 287 million, corresponding to 2.8 percent. Thereby the increase in GGR for gaming machines and land-based casino was not enough to cover the fall in GGR for both betting, online casino and lotteries.

Figure 1. GGR for the Danish gambling market 2021-2022, million DKK



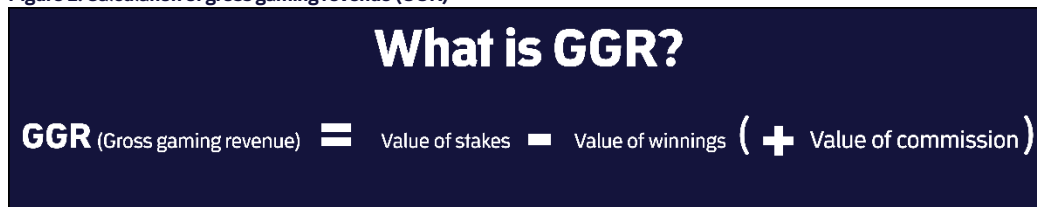
Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet, Landbrugslotteriet and accounts from charity lottery licences.
Note: 2022-prices

Use of the term “gross gaming revenue” (GGR)

In *The Gambling Market in Numbers 2022*, gross gaming revenue (GGR) is used consistently as a tool to measure the size of the gambling market. GGR is defined as the players’ stake in a game, minus winnings, plus the commission, players may pay to participate in a game, cf.

figure 2. Thus, GGR is an expression for how much players lose to gambling operators. Therefore, GGR is often described as the gambling spend. However, it should be noted that the GGR is higher than what players actually lose as the bonuses, which players gamble away also count as stakes.

Figure 2. Calculation of gross gaming revenue (GGR)



What is GGR?

GGR (Gross gaming revenue) = Value of stakes - Value of winnings (+ Value of commission)

GGR is used internationally among other countries' gambling regulators to measure the size of the gambling markets. In addition, GGR is used as a basis of calculation for the gambling duty that licence holders offering betting, online casino, gaming machines and land-based casino must pay to the Danish state.

Data used in the report

The Gambling Market in Numbers 2022 is based on several different data sources. This especially includes data on gambling duties from licence holders to the Danish Tax Agency and data sent to the Danish Gambling Authority's gambling control system. Statistics from monopoly lotteries comes from the licence holders' direct reports to the Danish Gambling Authority. ROFUS and StopSpillet data originates from internal systems in the Danish Gambling Authority. Statistics for charity lotteries is based on the accounts submitted by licence holders after the lottery is run. Finally, data on gambling markets in Europe and channelling rates come from the international market research institute H2 Gambling Capital.

Data used in the report may change. The most recently updated numbers for the gambling market are always available in the monthly statistics on [Spillemyndigheden.dk](https://spillemyndigheden.dk).

Key figures from the gambling market in 2022

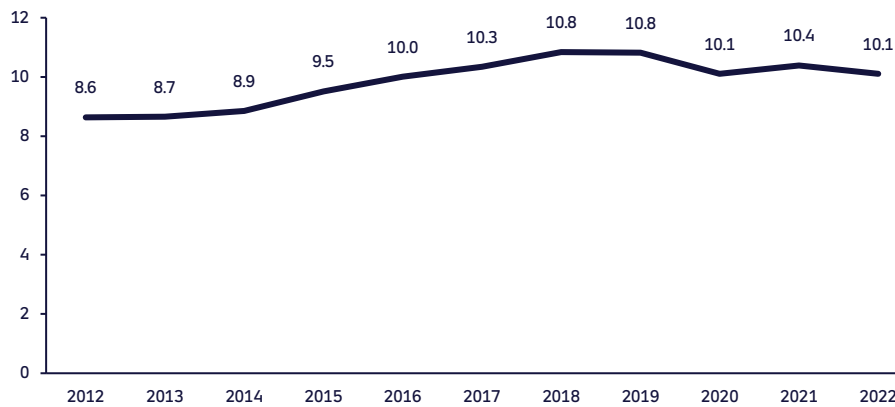
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1.1 The development in the gambling market in 2022

The total gambling market in Denmark amounted to DKK 10.1 billion in 2022, *cf. figure 3*. It corresponds to a year-on-year fall of DKK 287 million, corresponding to 2.8 percent. Since 2012, the GGR is increased by DKK 1.5 billion, corresponding to 17 percent. For periods during 2020, 2021, and 2022, the gambling market was affected by covid-19 restrictions that caused lockdowns of restaurants, gambling arcades and casinos, which affected the GGR negatively.

DKK 10.1 billion

Figure 3. GGR for the total Danish gambling market 2012-2022, billion DKK

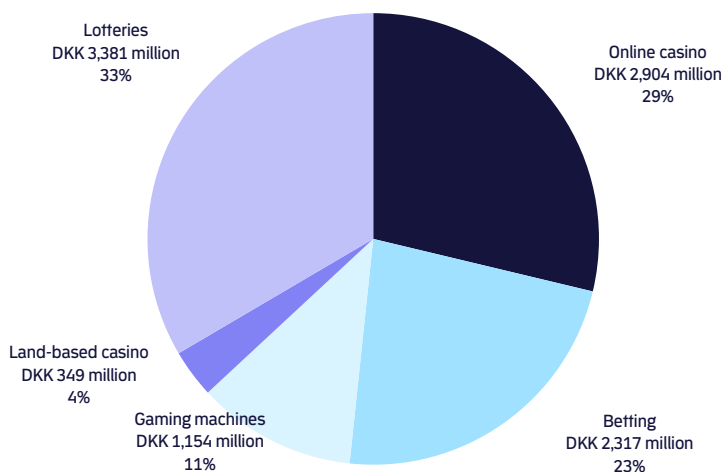


GGR for the gambling market in 2022

Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Def Danske Klasselotteri A/S, Varelotteriet, Landbrugslotteriet and accounts from charity lottery licences.
Note: 2022-prices

Measured in GGR, lottery was the largest gambling sector of 2022 as were the case in 2021. The sector accounted for DKK 3,381 million, corresponding to 33 percent of the gambling market, *cf. figure 4*. Together, online casino and betting made up just over half of the gambling market, while gambling machines and the land-based casinos were the smallest gambling sectors with market shares of 11 percent and 4 percent, respectively. These two gambling sectors were affected by covid-19 measures in January, when gambling arcades and casinos were locked down.

Figure 1. Market shares for gambling sectors in 2022

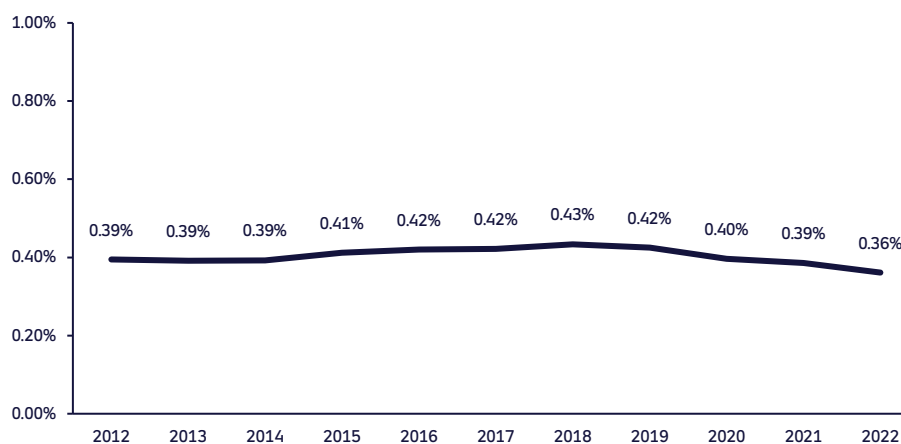


Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Def Danske Klasselotteri A/S, Varelotteriet,

Landbrugslotteriet and accounts from charity lottery licences.

The development in the gambling market should be seen in context with the development of the total Danish economy. In 2022, the total GGR corresponded to 0.36 percent of the Danish Gross Domestic Product (GDP)¹.

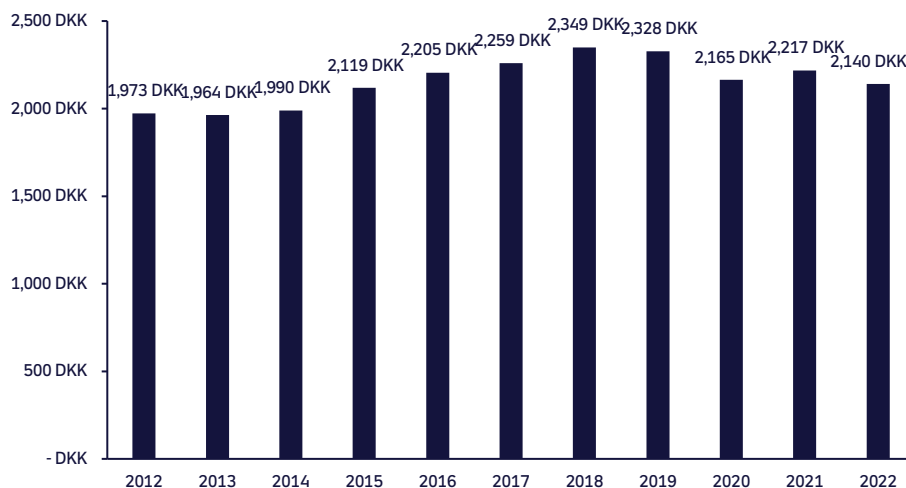
Figure 5. GGR for the total Danish gambling market as share of GDP 2012-2022



Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet, Landbrugslotteriet and accounts from charity lottery licences and Statistics Denmark

The development in the gambling market must also be seen in context with the increase in population. In 2022, Danes spent an average of DKK 2,140 on gambling, which is DKK 77 less than in 2021, corresponding to a fall of 3.5 percent. Compared to 2012, the spend per Dane in 2022 is increased by DKK 167, which corresponds to 8.5 percent.

Figure 6. Average gambling spend per Dane over 18 2012-2022



Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet, Landbrugslotteriet and accounts from charity lottery licences and Statistics Denmark

Note: Gambling spend is measured by GGR. 2022-prices.

¹ GGR is an economic indicator of the value of a country's total production of goods and services.

1.2 Licences for gambling in 2022

One of the Danish Gambling Authority's core tasks is to issue licences to offer gambling products and services in Denmark. During 2022, there were 912 licences to offer gambling on the Danish market, *cf. table 1*.

912

Licences to offer gambling in Denmark in 2022

The number of licences issued varies from sector to sector. In 2022, there were 514 licences to offer charity lottery. In addition, the Danish Gambling Authority was notified of 811 charity lotteries.

In Denmark, lotteries without a charitable purpose are monopolised. In 2022, there were four licences to offer lottery.

There were 26 and 41 licences to offer betting and online casino, respectively. Out of these, three of the betting licences and five of the online casino licences were revenue-restricted. A revenue-restricted licence applies for one year and requires that the GGR does not exceed DKK 1 million. A licence which is not restricted may apply for up to five years.

In 2022, there were 318 licences to install land-based gaming machines in restaurants, cafes, bars and gambling arcades. There were nine licences to offer land-based casino.

On Spillemyndigheden.dk you can always see an updated list of licence holders in Denmark.

Table 1. Licences and notifications to offer gambling in Denmark in 2022

Gambling sector	Number of licences/notifications
Betting	23
Betting – Revenue-restricted	3
Online casino	36
Online casino – Revenue-restricted	5
Gaming machines	318
Land-based casinos	9
Monopoly lotteries	4
Charity lotteries – Licences	514
Charity lotteries – Notifications	811

Source: the Danish Gambling Authority

1.3 World Cup 2022

The World Cup took place from the 20th of November to the 18th of December 2022, and many Danes chose to bet on the matches. Denmark was one of the 32 participating countries and especially Denmark's matches had a clear effect on the betting market during the finals. During the World Cup, the Danes' deposits were biggest on the days when Denmark played their three matches.

In that period, Danes' deposit was biggest on the 30th of November, when Denmark played their last match of the group stage against Australia, cf. figure 7. On that day, the deposit was 76 percent higher compared to 13 December, which was the day when the deposit was smallest during the World Cup period.

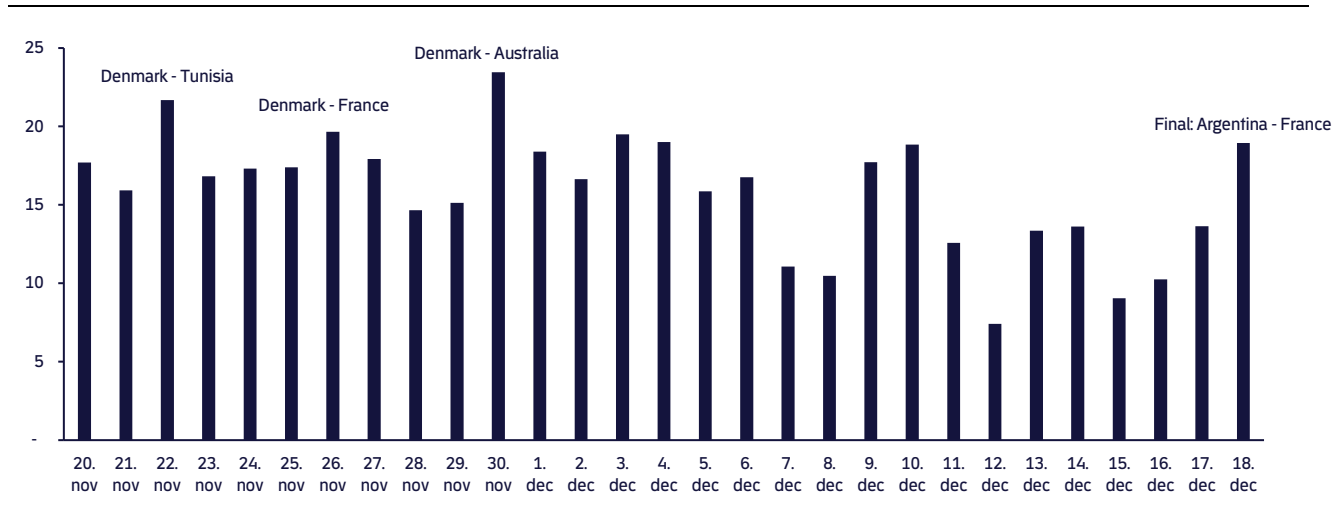
The day with the second highest deposit was on the 22nd of November, when Denmark played against Tunisia while the 26 November, when Denmark played against France, were the day with the third highest deposit during the finals.

Also the 18th of December, when the final between Argentina and France was played, the deposit was higher compared to many other days during the finals. That day is only surpassed by the days when Denmark played and the 3rd and 4th of December when two matches of the round of 16 were played each day.

Between round of 16, quarterfinals, semifinals and finals, there were days with no World Cup matches played. Here, the deposits on betting were markedly lower compared with the days in the period when World Cup matches were played.

The Danes' gambling activity during the finals resembles a pattern we have seen at previous finals, where the Danes' gambling activity on betting was biggest on days when Denmark player their matches.

Figure 7. Scaled value of stakes on betting, 20 November – 18 December 2022



Source: the Danish Gambling Authority's gambling control system

Note: Data in the figure is for the total betting market in the period. The Danish Gambling Authority does not have data for individual sports or tournaments

1.4 Development in land-based and online gambling

In Denmark, you can gamble both online and land-based. This means that you can gamble both on the internet or on-site at different locations such as a gambling arcade, restaurant, bar, or kiosk.

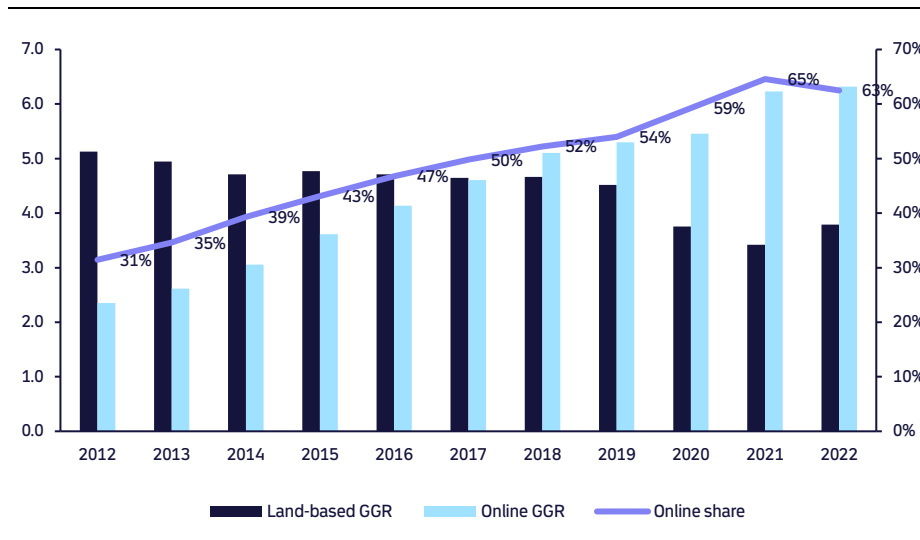
In 2022, 63 percent of the total GGR came from online gambling, cf. figure 8. It is an increase of 31 percentage point compared to 2012. It should be noted that gambling arcades and land-based casinos were closed in January 2022 due to covid-19 measures, which affected the GGR from land-based gambling. The measures also affected the land-based gambling market in 2020 and 2021. Those years, the lockdowns went on for longer periods compared to 2022, which is part of the explanation why, the share of online gambling fell a little from 2021 to 2022.

Except from 2022, the share of GGR coming from online gambling has increased every year since 2012. The land-based GGR has fallen in this period, while the GGR from online gambling has increased. Accordingly, the increase in GGR that characterises the Danish gambling market is driven by the increase in online gambling.

63%

Share of GGR from online gambling in 2022

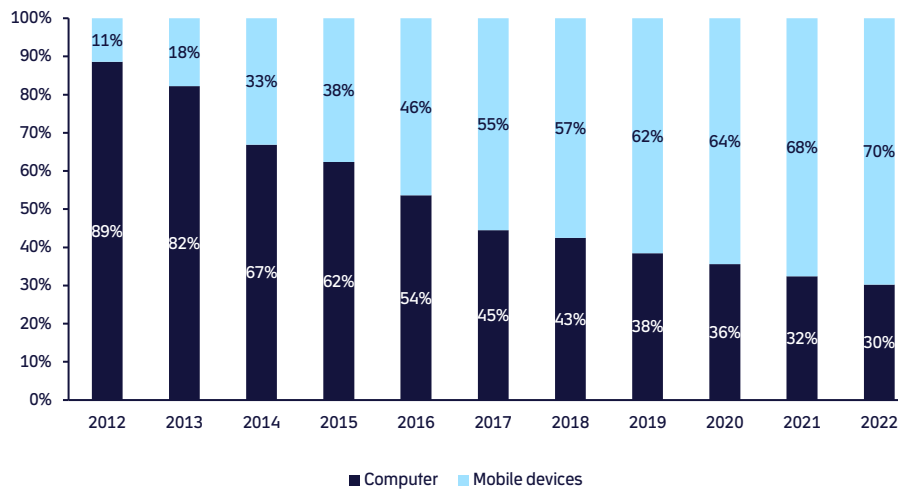
Figure 8. GGR of gambling market categorised by sales channels, billion DKK 2012-2022



Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Def Danske Klasselotteri A/S, Varelotteriet, Landbrugslotteriet and accounts from charity lottery licences

Online games are available both on computers and mobile devices such as phones and tablets. Since 2012, the share of GGR for online betting and online casino coming from mobile devices has increased from 11 percent to 70 percent. The development must be seen in context with the general technological development in Denmark, where continuously becomes easier to buy and sell goods and services via mobile devices.

Figure 9. GGR for online betting and online casino categorised by sales channels



Source: the Danish Gambling Authority's gambling control system

1.5 Demographic profile of players

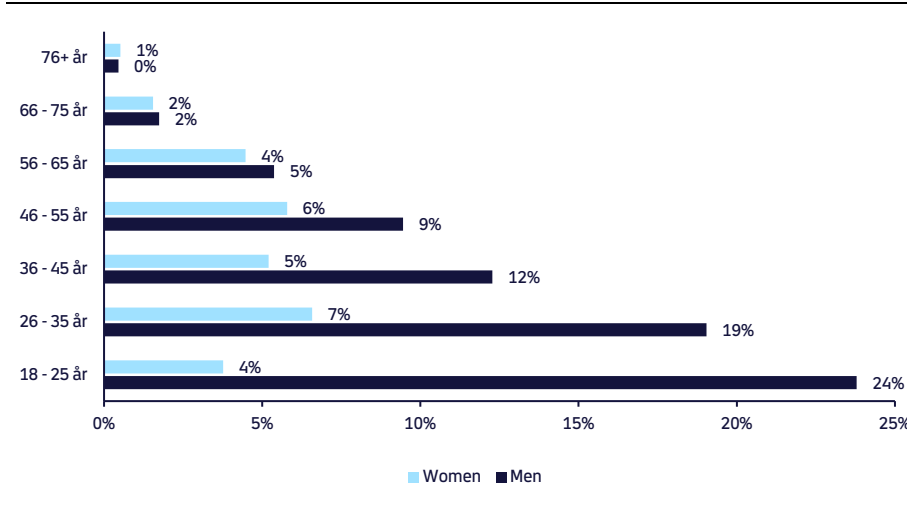
Online gambling takes up a large share of the Danish gambling market and as a part of our supervision of the gambling market, the Danish Gambling Authority receives statistics on the licence holders' active players.

72 and 84 percent of the active online casino accounts and betting accounts respectively, are created by men, *cf. figures 10 and 11*. At the same time, the data shows that it is mostly young people who gamble online. In this way, 53 percent and 57 percent of the online casino accounts and the betting accounts, respectively, belong to individuals under 36.

72%

Share of active online casino accounts in 2022 belonging to men

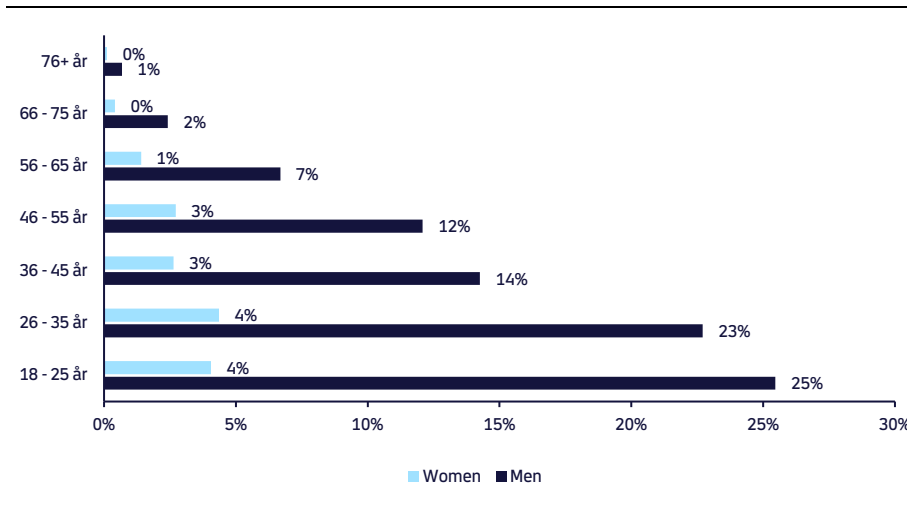
Figure 10. Online casino accounts categorised by sex and age, 2021²



Source: Annual accounts submitted by licence holders to the Danish Gambling Authority

Many of the online accounts in Denmark thereby belong to young men. Specifically, 43 percent and 48 percent of the online casino accounts and betting accounts, respectively belong to men under 36 years old.

Figure 11. Active online betting accounts categorised by sex and age, 2021²



Source: Annual accounts submitted by licence holders to the Danish Gambling Authority

² The Danish Gambling Authority has not received annual accounts for 2022 at the time of publication, which is why data from 2021 is shown

1.6 Danish gambling spend compared to Europe

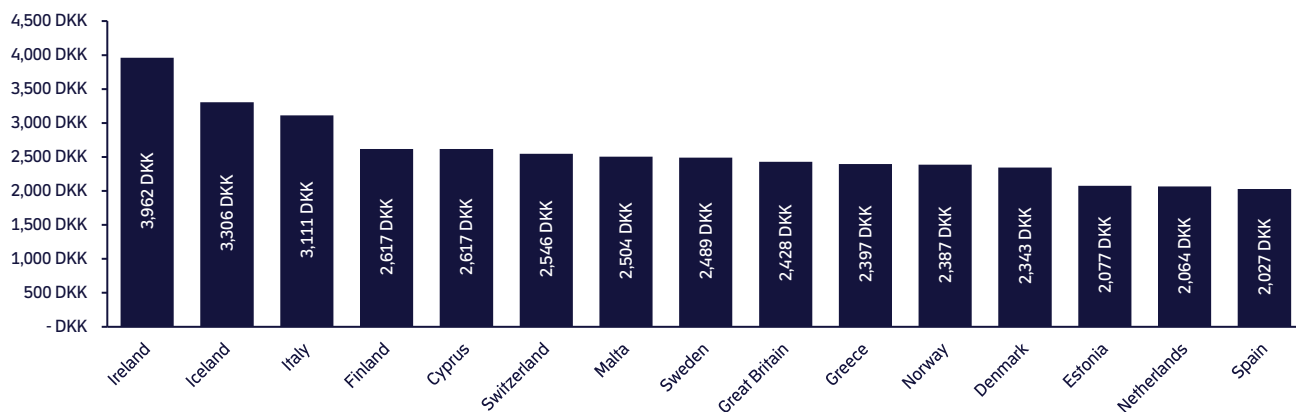
The gambling markets in the European countries differ from each other in various aspects. This is, for example, true in relation to how the gambling markets are regulated, i.e., the framework and requirements gambling operators must comply with. The differences are also reflected in the gambling spend per capita in European countries.

No. 12

In 2022, Denmark had the 12th highest gambling spend per capita in Europe

In 2022, with DKK 2,343, Denmark had the 12th highest gambling spend per adult in Europe, cf. figure 12. This is also the lowest gambling spend per adult in the Nordic countries, since Iceland, Finland, Sweden and Norway were ranked higher. The amounts also include the spending on online gambling websites that do not have a licence in the countries in question. Ireland had the highest gambling spend per capita in 2022 of DKK 3,962.

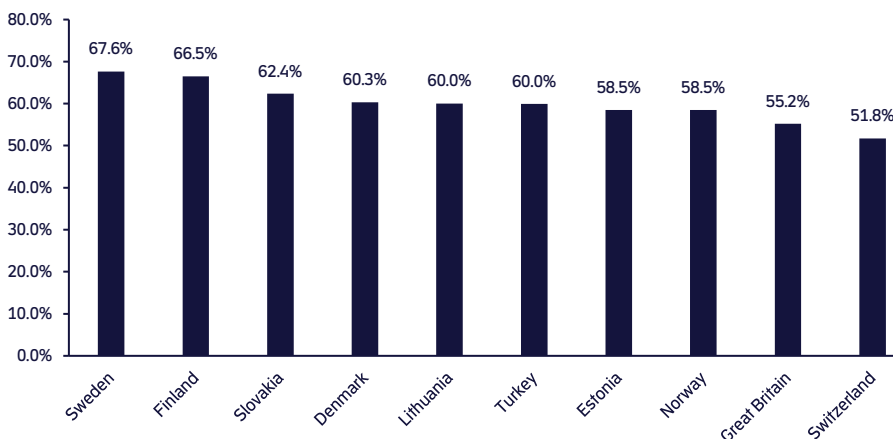
Figure 12. Top 15 countries in Europe with the highest annual gambling spend per adult in 2022



Source: H2 Gambling Capital. Data may change, which is why the data may be updated at a later time. Data is drawn on 25 April 2023.
 Note: Gambling spend is measured by GGR. Data includes both the regulated markets and the unregulated markets.

The countries also vary when it comes to the share of the gambling spend which takes place online. If you include the spend coming from gambling websites without a Danish licence, Denmark had the fourth largest share of the gambling spend generated online in Europe, cf. figure 13. With its 68 percent, Sweden had the largest share of the gambling spend which is generated online. The large share of online gambling must be viewed in the context that Denmark, in an international perspective, generally has a high degree of digitisation.

Figure 13. Top 10 countries Europe with the highest gambling spend generated online, 2022



Source: H2 Gambling Capital. Data may change, which is why the data may be updated at a later time. Data is drawn on 25 April 2023.
 Note: Gambling spend is measured by GGR. Data includes both the regulated markets and the unregulated markets.

1.7 Development in channelling rate

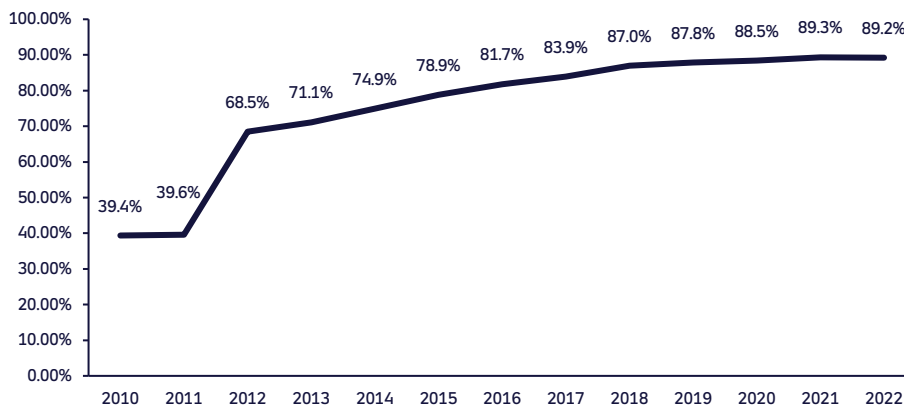
The Danish Gambling Authority continually monitors the development in the channelling rate in Denmark. The channelling rate describes how large a share of the online gambling spend that comes from gambling operators with a licence to offer gambling in Denmark. Thereby, the channelling rate shows how large a share of the online gambling spend that takes place on websites that must comply with the Danish rules for offering gambling and pay gambling duties to the Danish state.

89%

Share of online gambling in Denmark with licensed sites in 2022

Before the liberalisation of betting and online casino on 1 January 2012, the channelling rate was just under 40 percent and thereby, one of the purposes with the liberalisation was to move part of the gambling spend to sites with a Danish licence to offer gambling. At the end of 2012, the channelling rate had increased to just under 69 percent and in 2022, it was 89.2 percent, which is on level with 2021, but almost 21 percentage points higher compared to 2012, cf. figure 14. It means that the majority of the online gambling spend in Denmark today takes place on websites who must comply with the Danish Gambling Act and whom the Danish Gambling Authority supervises.

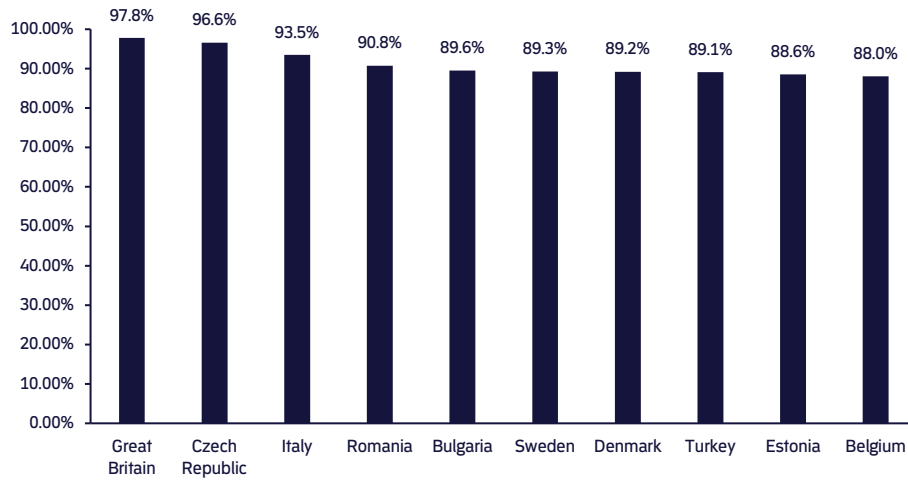
Figure 14. Online channelling rate in Denmark, 2010-2022



Source: H2 Gambling Capital. Data may change, which is why the data may be updated at a later time. Data is drawn on 25 April 2023.

In a European perspective, the channelling rate in Denmark is relatively high. In 2022, Denmark was part of the top 10 European countries with the highest channelling rate, cf. figure 15. Great Britain had the highest channelling rate in Europe of 97.8 percent.

Figure 15. Top 10 European countries with the highest channelling rate in 2022



Source: H2 Gambling Capital. Data may change, which is why the data may be updated at a later time. Data is drawn on 25 April 2023.

1.8 ROFUS – Register of self-excluded players

The Danish Gambling Authority is responsible for the register of self-excluded players (ROFUS), where Danish players can self-exclude from online gambling and gambling at land-based casinos either temporarily for 24 hours, one, three or six months, or permanently. A permanent self-exclusion means that you can request a deregistration after one year at the earliest.

Gambling operators with a licence from the Danish Gambling Authority must always refer to ROFUS in their marketing. This helps ensure that Danish players are aware of the option to self-exclude from gambling.

By the end of 2022, 38,921 Danes were registered with ROFUS, *cf. figure 16*. This is a year-on-year increase of more than 8,000 Danes. It is the biggest annual increase in the number of Danes registered since ROFUS was established in connection with the partial liberalisation of the gambling market in 2012.

38,921

Number of players registered with ROFUS at the end of 2022

Figure 26. Players registered with ROFUS, 2012-2022

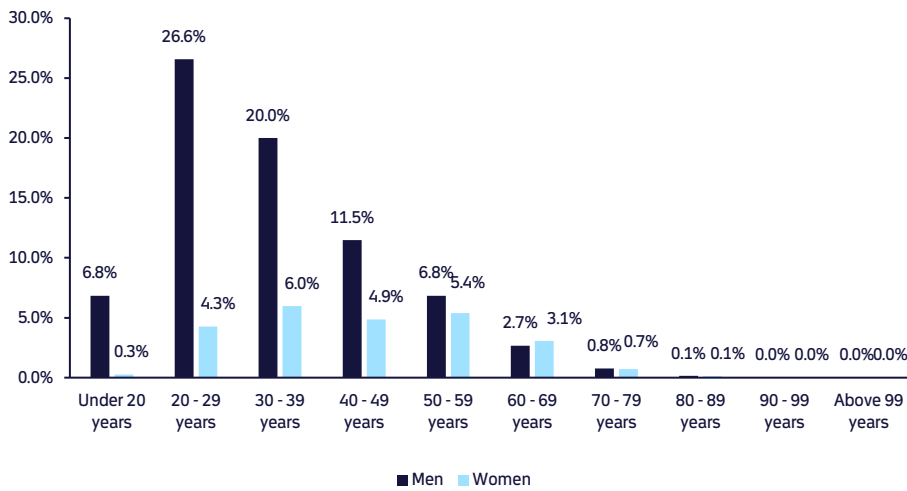


Source: the Danish Gambling Authority

Note: Both players who are temporarily excluded and permanently excluded are included in the data set. For 2012-2019, data is drawn on 1 January the following year, and for 2020 and 2021, data is drawn on 31 December and for 2022, data is drawn on 5 January 2023. Thus, the figure only state the number of players registered on the day data was drawn. The category of 24 hour exclusion is not included in the figure, since there are relatively rare variations in this group from day to day.

The majority of the registered Danes are men, which has been a tendency since the establishment of ROFUS. In the beginning of 2023, 29,326 of the registered were men, corresponding to 75 percent, *cf. figure 17*. The age distribution shows that almost two out of three registered players were under 40 years old. 33 percent of the registered players were men under 30 years old.

Figure 17. Players registered with ROFUS categorised by sex and age, 5 January 2023

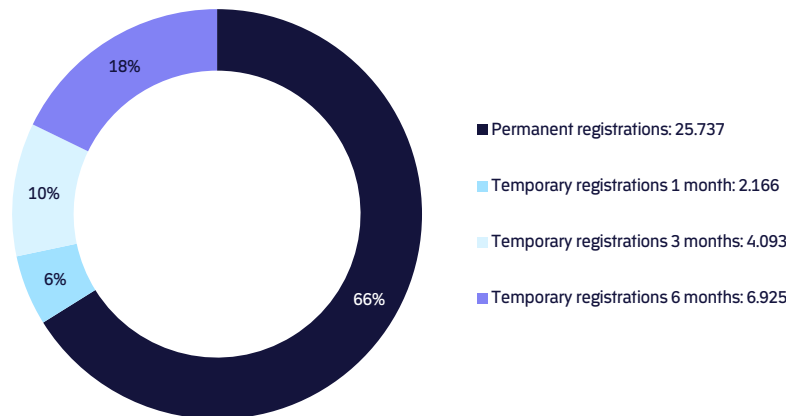


Source: the Danish Gambling Authority

Note: The category of 24 hour exclusion is not included in the figure, since there are relatively rare variations in this group from day to day.

Most of the players registered with ROFUS have excluded themselves permanently. In the beginning of 2023, 25,737 had chosen a permanent exclusion, corresponding to 66 percent, cf. figure 18. From the temporary exclusions, 6,925 had chosen six months, corresponding to 18 percent. 4,093 had chosen a 3-month exclusion, corresponding to 10 percent, while 2,166 persons, corresponding to 6 percent, had excluded themselves for one month.

Figure 18. Players registered with ROFUS categorised by type of exclusion, 5 January 2023



Source: the Danish Gambling Authority

Note: The category of 24 hour exclusion is not included in the figure, since there are relatively rare variations in this group from day to day.

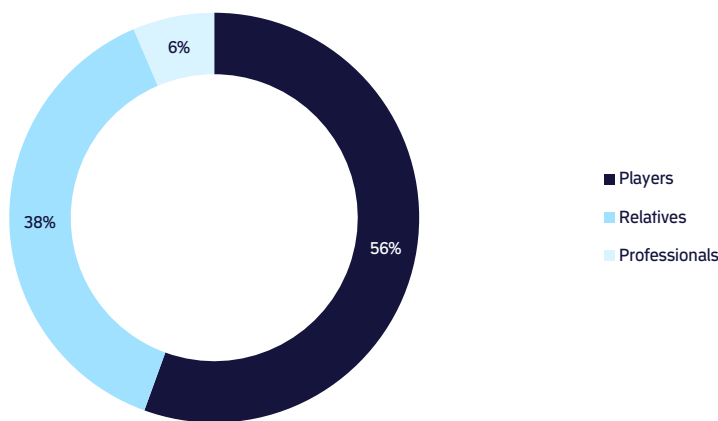
1.9 StopSpillet – Helpline about compulsive gambling

The Danish Gambling Authority operates StopSpillet, which is a helpline that players, relatives and professionals can call or chat with to get advice and guidance on compulsive gambling and responsible gambling. In 2022, StopSpillet received 560 calls and chats. This is an increase compared to 2021, when StopSpillet received 499 calls and chats. About half of the calls and chats came from players, while 38 percent and 6 percent came from relatives and professionals, respectively, *cf. figure 19*.

560

Calls and chats for StopSpillet in 2022 from players, relatives and friends, and professionals

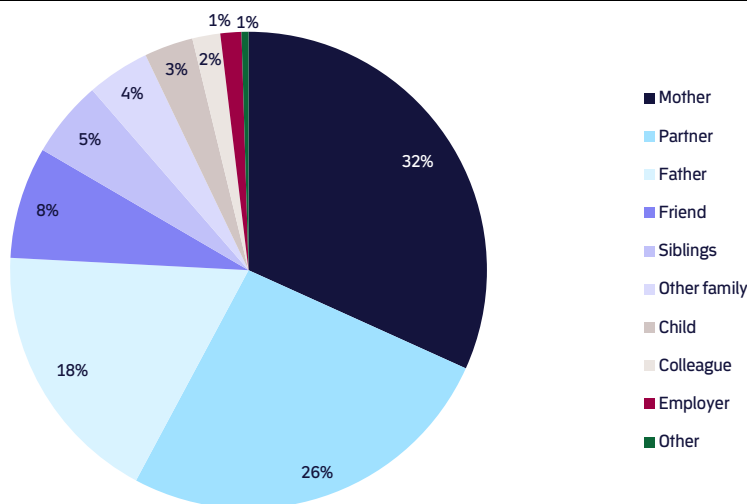
Figure 19. StopSpillet conversations categorised by type of caller in 2022



Source: the Danish Gambling Authority

When relatives and friends contacted StopSpillet in 2022, half of the conversations were with a parent of a player, *cf. figure 20*. About every fourth conversation came from a partner of a player. In addition, there were calls and chats from friends, siblings, children, other family, colleagues, and employers of the player in 2022.

Figure 20. StopSpillet conversations with relatives and friends in 2022 categorised by relation

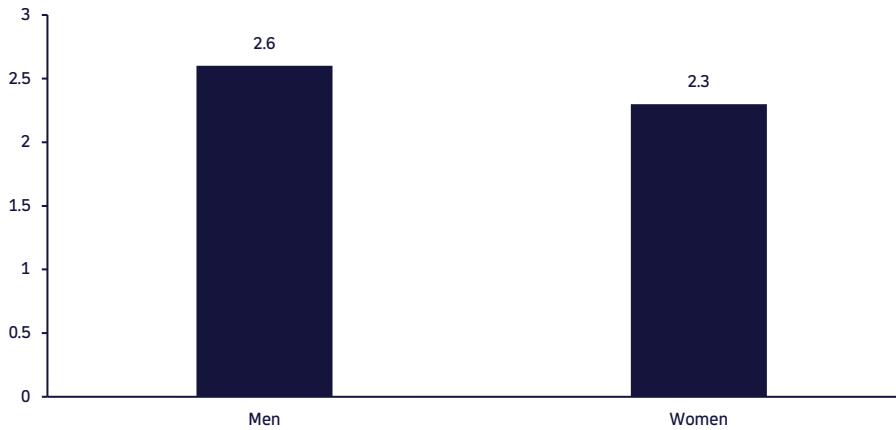


Source: the Danish Gambling Authority

When players contact StopSpillet, they typically have had a problem with gambling for a relatively long period. On average, players estimate that they have had problems with

gambling for about two and a half years before they contact StopSpillet. The conversations in 2022 showed a tendency: the men had had gambling problem for a little longer than the women, when they contacted StopSpillet, cf. figure 21.

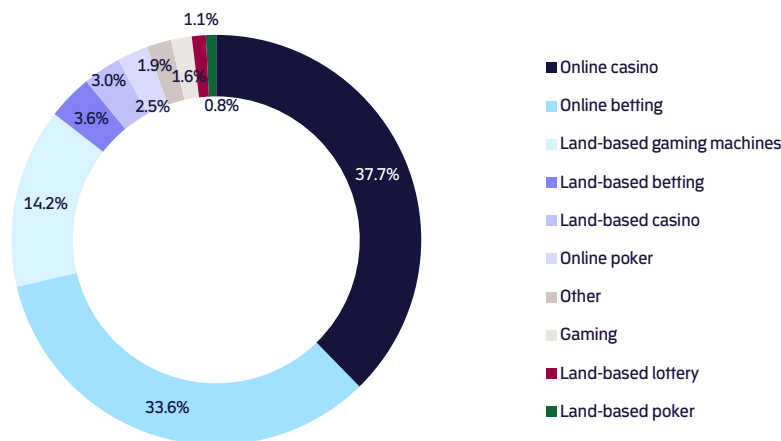
Figure 21. Average number of years players have had gambling problems when they contacted StopSpillet, 2022



Source: the Danish Gambling Authority

One of the things, the advisers ask about, when a player contacts StopSpillet, is the types of games they play. The majority of those who contact StopSpillet state online gambling as their preferred games. In the 2022 StopSpillet conversations, online casino and online betting together accounted for 71 percent of the types of games stated. Land-based gaming machines and land-based betting accounted for 14 percent and 4 percent of the games stated, respectively. Finally, StopSpillet also had conversations with players who preferred land-based casino, land-based and online poker, games related to video gaming, land-based lotteries and other types of games.

Figure 22. Players preferred types of games, 2022



Source: the Danish Gambling Authority

Note: Up to two types of games are registered per player. Only players who have contacted StopSpillet themselves are included.

Development in the gambling sectors in 2022

2

2.1 Charity lotteries

In Denmark, lotteries are subject to a monopoly. However, it is allowed to run lotteries if they have a charitable purpose. In 2022, 1,325 charity lotteries were run. The Danish Gambling Authority had been notified of 811 of the lotteries. Those were lotteries with a selling price of DKK 20,000 or less. These lotteries do not require a licence from the Danish Gambling Authority. The remaining 514 lotteries were licensed by the Danish Gambling Authority.

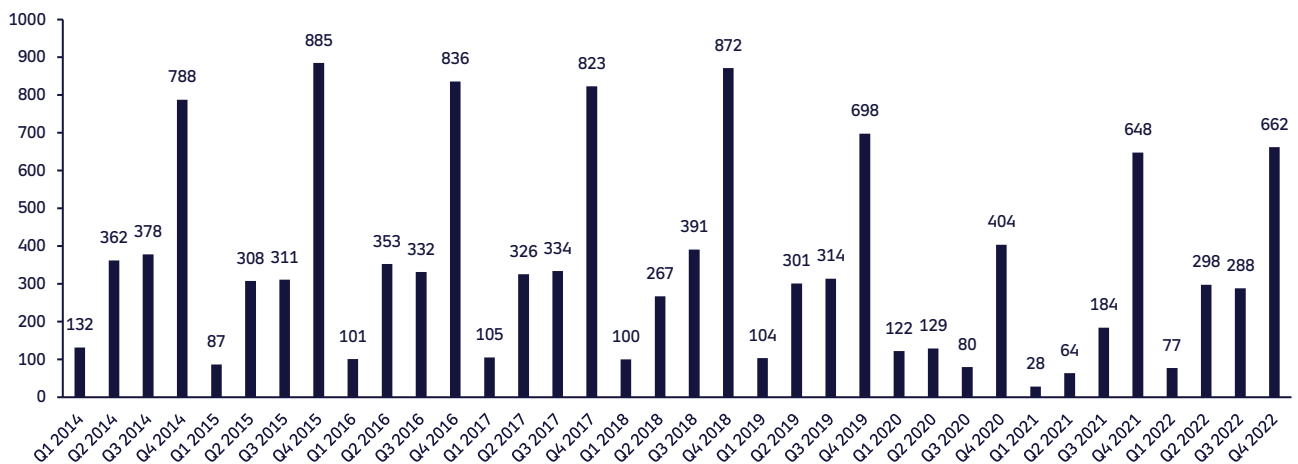
1,325

Charity lotteries run in 2022

The 1,325 charity lotteries in 2022 are in increase compared to 2020 and 2021, when 735 and 924 lotteries were run, respectively. The lower number of lotteries in 2020 and 2021 are highly due to covid-19, which meant that many associations refrained from running lotteries. In 2019, (before covid-19) 1,417 lotteries were run.

662 of the charity lotteries in 2022 were held in fourth quarter, corresponding to 50 percent, cf. figure 23. It is a clear trend that many charity lotteries are held at the end of the year. This is because many associations want to run lotteries in connection with Christmas.

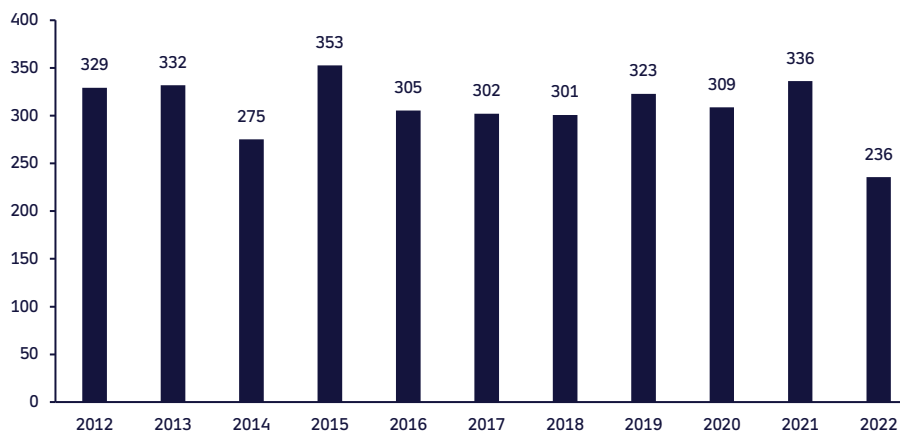
Figure 23. Charity lotteries run in 2022 (includes both notifications and licences)



Source: the Danish Gambling Authority

In 2022, the GGR for charity lotteries amounted to DKK 236 million. This is a year-on-year fall of DKK 101 million, corresponding to 30 percent. The GGR for 2022 is the lowest, the sector has seen the past 11 years.

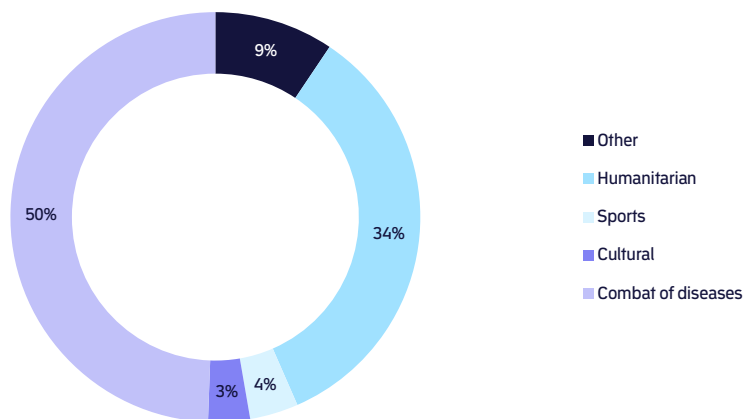
Figure 14. GGR for charity lotteries, 2012-2022



Source: Accounts from licences for charity lotteries
 Note: 2022-prices. GGR in 2022 is a preliminary estimate. Only GGR from licences for charity lotteries is included.

Charity lotteries are run for the benefit of various good causes. In 2022, about 50 percent of the GGR from charity lotteries went to combat of diseases. 34 percent of the GGR came from lotteries with a humanitarian purpose, cf. figure 25. The smallest charity lotteries, measured by GGR, are those whose profit goes to sports and cultural purposes. They accounted for 4 and 3 percent of the total GGR for charity lotteries in 2022, respectively.

Figure 25. GGR for charity lotteries in 2022 categorised by charitable cause



Source: Accounts from licences for charity lotteries
 Note: GGR in 2022 is a preliminary estimate. Only GGR from licences for charity lotteries is included.

2.2 Monopoly lotteries

In Denmark, lotteries are subject to a monopoly if the lottery does not have a charitable purpose. This means that it is only Danske Lotteri Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet and Landbrugslotteriet, who can offer lotteries and class lotteries.

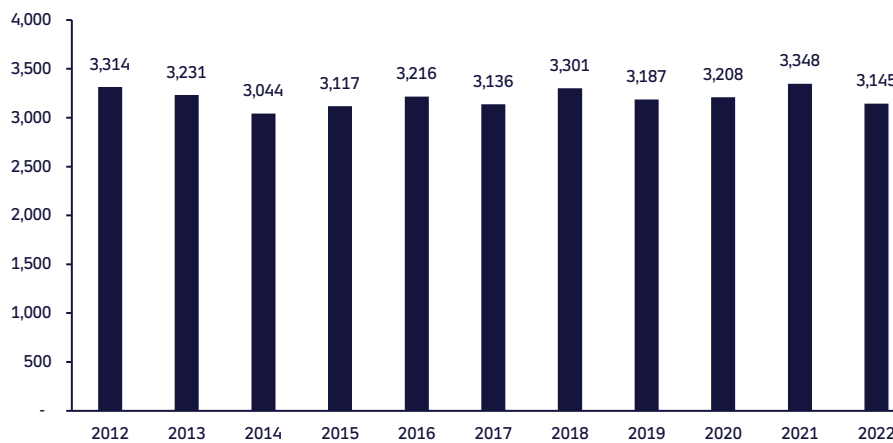
In 2022, the total GGR for the monopoly lotteries amounted to DKK 3,145 million. It is a year-on-year fall of DKK 203 million, corresponding to 6.1 percent. Thereby, together charity lotteries and monopoly lotteries accounted for 33 percent of the total Danish gambling market in 2022.

The monopoly lotteries have been characterised by a steady development in the GGR since the partial liberalisation of the gambling market in 2012, *cf. figure 26*. The GGR has varied between DKK 3,044 million in 2014 and DKK 3,348 million in 2021.

-6%

Development in GGR for monopoly lotteries from 2021 to 2022

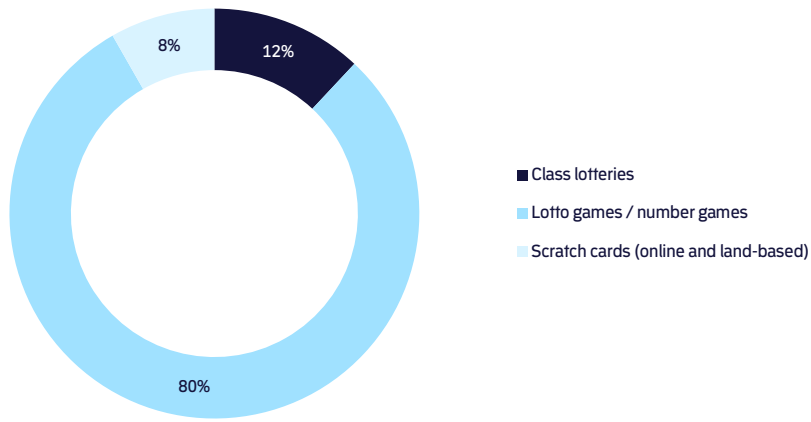
Figure 26. GGR for monopoly lotteries 2012-2022, million DKK



Source: Danske Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet and Landbrugslotteriet
 Note: 2022-prices

Like in previous years, the GGR for lottery games/number games in 2022 also accounted for the vast majority of the GGR in the sector, *cf. figure 27*. Specifically, the GGR for these types of games, which include Lotto, Vikinglotto, Joker, Eurojackpot, Alt Eller Intet and Keno, accounted for DKK 2,509 million, corresponding to 80 percent of the total GGR for the monopoly lotteries. The three class lotteries' total GGR amounted to DKK 376 million, corresponding to 12 percent, while scratch cards (both online and land-based) amounted to DKK 260 million, corresponding to 8 percent.

Figure 27. Share of GGR for monopoly lotteries categorised by type of lottery, 2022



Source: Danske Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet and Landbrugslotteriet

2.3 Land-based casinos

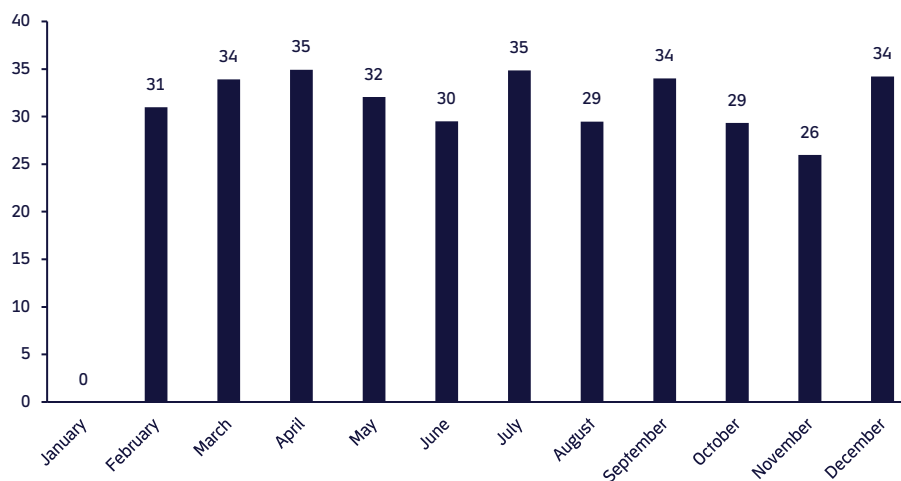
In 2022, nine land-based casinos were licensed to offer gambling in Denmark. The total GGR for the land-based casinos in 2022 amounted to DKK 349 million, which is an increase of DKK 113 million compared to 2021, corresponding to 48 percent. The land-based casinos accounted for 3 percent of the total gambling market in Denmark in 2022, and thereby it was the smallest gambling sector measured by GGR.

48%

Development in GGR for land-based casinos from 2021 to 2022

In the beginning of 2022, the land-based casinos were closed as part of the covid-19 measures. However, in February the casinos opened again. Thereby, the casinos were open for a markedly longer period in 2022 than in 2021, which explains the increase in GGR between the two years. In 2021, the casinos were affected by lockdowns in January, February, March, April, May and December. Comparing the GGR to 2019, which was not affected by lockdowns, the GGR fell by 9 percent in 2022.

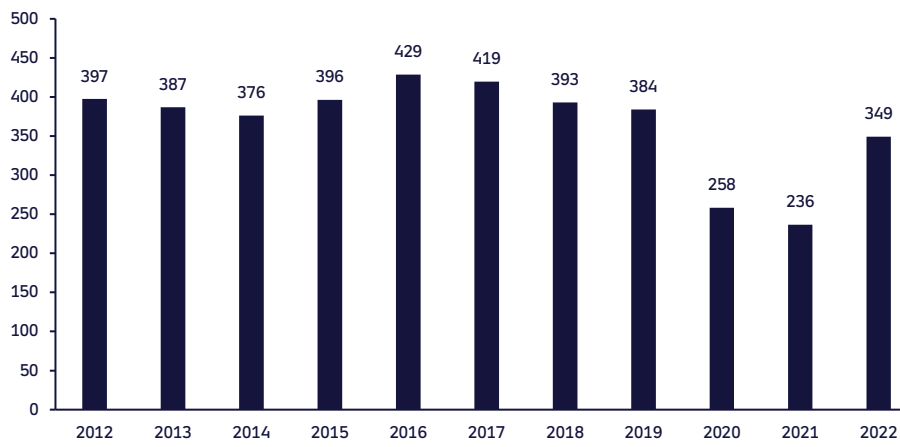
Figure 28. GGR for land-based casinos in 2022, million DKK



Source: Data on duties reported by licence holders to the Danish Tax Agency

From 2012 to 2019, the GGR for the land-based casinos was relatively steady, cf. figure 29. The GGR peaked in 2016 with DKK 429 million, but since then there has been an annual decrease which was enhanced by the covid-19 measures in 2020 and 2021, before it increased again in 2022. However, this increase did not bring the GGR on level with the years before covid-19. From 2012 to 2019, the GGR fell by 3 percent.

Figure 29. GGR for land-based casinos 2012-2022, million DKK



Source: Data on duties reported by licence holders to the Danish Tax Agency
Note: 2022-prices

2.4 Gaming machines

In 2022, the GGR for gaming machines amounted to DKK 1,154 million, which is a year-on-year increase of DKK 311 million, corresponding to 37 percent. Thereby, gaming machines accounted for 11 percent of the total Danish gambling market in 2022.

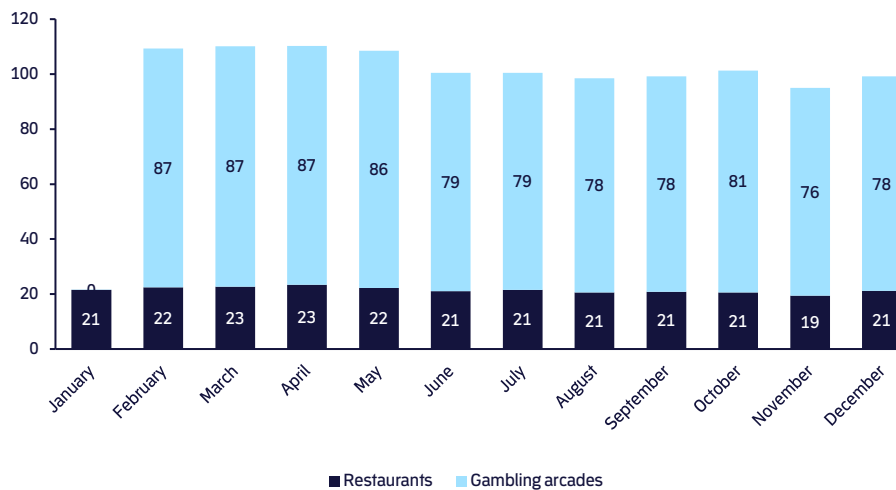
37%

Development in GGR for gaming machines 2021 to 2022

In January 2022, gambling arcades were closed as part of the covid-19 measures. However, they reopened already in February and thereby, 2022 was not affected by covid-19 measures for nearly as long as in 2021, when the market for gaming machines was affected in January, February, March, April, May and December. This explains the increase in GGR between the two years. Comparing to 2019, when there were no covid-19 measures, the GGR has fallen by 25 percent in 2022.

In 2022, 78 percent of the GGR came from gaming machines installed in gambling arcades, while 22 percent came from gaming machines in restaurants, cafes, and bars. On 31 December 2022, the gaming machines were distributed among 874 gambling arcades and 1,161 restaurants, cafes, and bars.

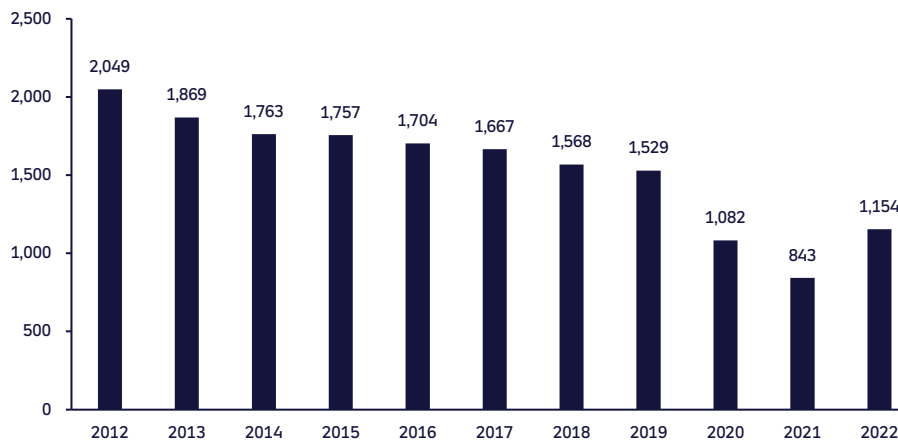
Figure 30. GGR for gaming machines in 2022 categorised by restaurants, cafes and bars and gambling arcades, million DKK



Source: Data on duties reported by licence holders to the Danish Tax Agency

The market for gaming machines has been characterised by a fall in GGR since 2012, cf. figure 31. From 2012 to 2019, the GGR fell by 25 percent and after that, the fall was enhanced by the covid-19 measures. From 2012 to 2022, the GGR had fallen by 44 percent.

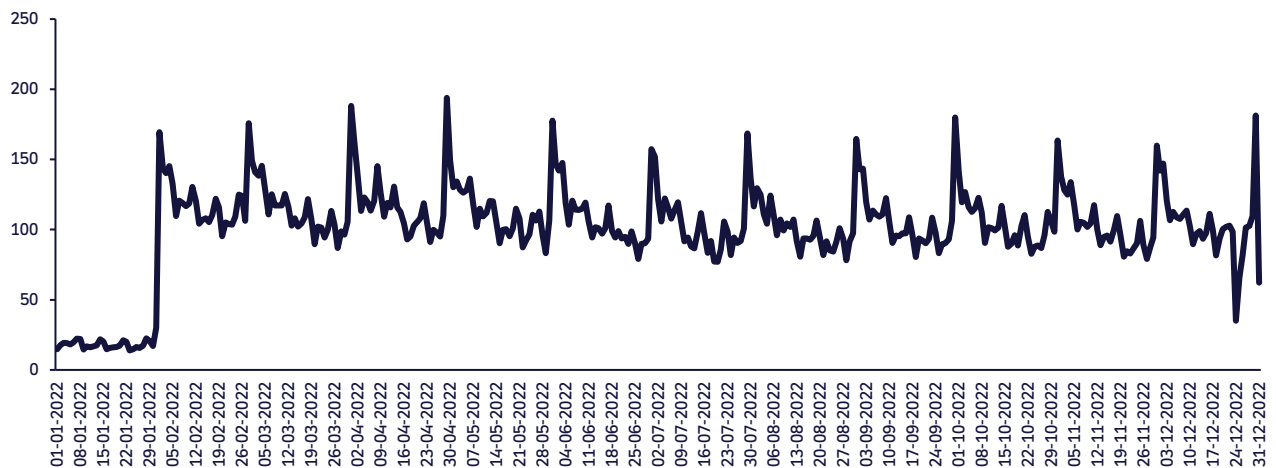
Figure 31. GGR for gaming machines 2012-2022, million DKK



Source: Data on duties reported by licence holders to the Danish Tax Agency
 Note: 2022-prices

In 2022, the activity on the gaming machines was highest on pay days. Thus, Danes gambled more with the gaming machines on the last working day of the month, which is the day, when most Danes receive their salary, cf. figure 32. Friday the 29th of April was the day in 2022, when most money was inserted to the machines. Moreover, figure 32 shows how the activity in January was markedly lower compared to the rest of 2022, because the gambling arcades were closed due to covid-19 measures.

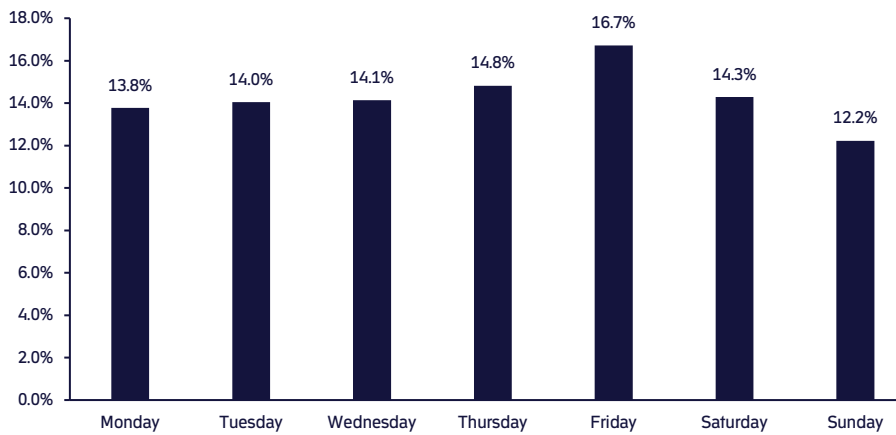
Figure 32. Indexed daily development in money inserted in the gaming machines in 2022



Source: Data on duties and control data submitted the Danish Gambling Authority

Danes can gamble on gaming machines all days of the week. In 2022, Friday was the day of the week when the highest amount was gambled at the machines in 2022, cf. figure 33. More specifically, the activity on Fridays were 17 percent of the total amount inserted in the machines in 2022. Sunday was the day when Danes spent the least on gaming machines.

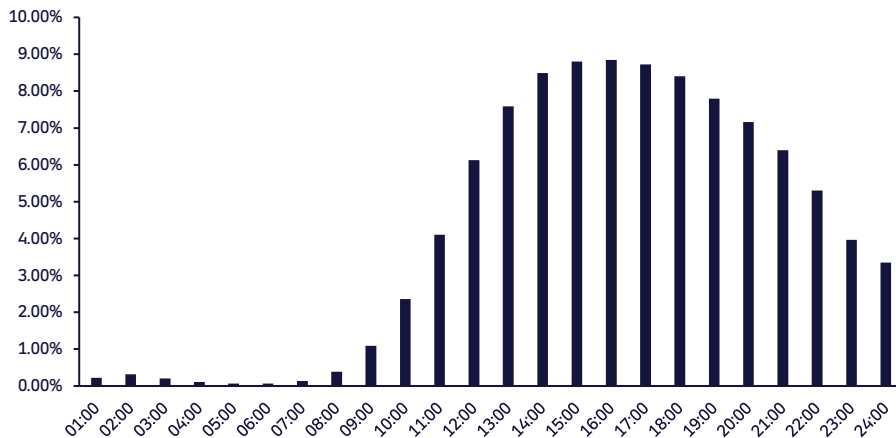
Figure 33. Money inserted in gaming machines categorised by weekday, 2022



Source: Data on duties and control data submitted the Danish Gambling Authority

It is possible to gamble on gaming machines 24 hours of the day, except on gaming machines installed in gambling arcades since they must be closed between midnight and 7 am. Consequently, the activity on gaming machines in the first 7 hours of the day only made up one percent of the total activity in 2022. In contrast, Danes gambled the most with gaming machines in the afternoon and in the evening, cf. figure 34. In this way, the amount spent on the gaming machines between 12 noon and 8 pm accounted for about two thirds of the total amount inserted in the gaming machines in 2022.

Figure 44. Money inserted in gaming machines categorised by hour of the day, 2022



Source: Data on duties and control data submitted the Danish Gambling Authority

2.5 Betting

In 2022, 26 operators were licensed to offer betting in Denmark. Three of the 26 licences were revenue-restricted, which is a special type of licence that only applies for a year, and where the GGR cannot exceed DKK 1 million. A betting licence, which is not restricted, can apply for up to five years.

It varied greatly how much the licence holders achieved in GGR. 11 licence holders achieved a GGR of less than DKK 25 million, seven licence holders achieved a GGR between DKK 25 and 100 million, while five achieved a GGR of more than DKK 100 million.

-11%

Development in GGR for betting from 2021 to 2022

Table 2. Licences for betting in Denmark in 2022 categorised by GGR

GGR (million DKK)	Number of licences
Less than 5	7
5 – 10	2
10 – 25	2
25 – 50	4
50 – 100	3
100 – 200	2
200 – 500	2
More than 500	1

Source: the Danish Gambling Authority

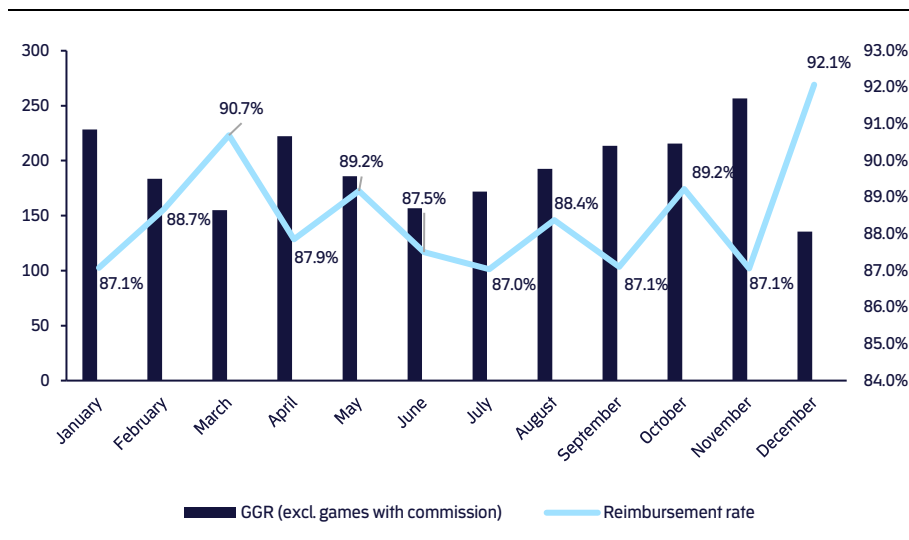
Note: Revenue-restricted licences are not included

In 2022, the GGR for betting amounted to DKK 2,317 million. It is a year-on-year fall of DKK 280 million, corresponding to 11 percent. Thereby, betting accounted for 23 percent of the total Danish gambling market in 2022.

The reimbursement rate affects the size of the gambling operators' GGR. The reimbursement rate is an expression of how large a share that is paid as winnings to players. For example, an average reimbursement rate of 90 percent means that the player gets DKK 90 when DKK 100 is staked in a bet.

In 2022, the average reimbursement rate was 88.5 percent. During the year, it varied between 87.0 in July and 92.1 in December, cf. figure 35. December was also the month with the smallest GGR.

Figure 35. GGR (excluding games with commission), million DKK, and reimbursement rate for betting in 2022



Source: Data on duties reported by licence holders to the Danish Tax Agency

After the liberalisation of betting in 2012, the betting market saw an annual increase in GGR up until 2018. In 2019, the GGR fell a little. The fall continued in 2020, which was especially due to cancelled and postponed sports events during the year following covid-19 measures, which meant that there were fewer matches to bet on. Compared to 2012, the GGR has increased by 52 percent in 2022.

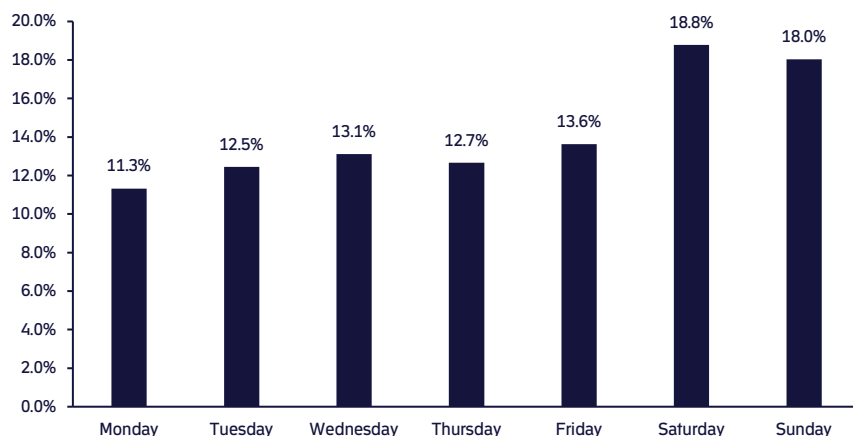
Figure 36. GGR for betting 2012-2022, million DKK



Source: Data on duties reported by licence holders to the Danish Tax Agency
 Note: 2022-prices

Every day, it is possible to bet on football matches and other sports. However, most bets are made in the weekend. In 2022, 37 percent of the betting deposits are made on Saturdays and Sundays. This is not unusual though, since most European football matches are played on these days of the week.

Figure 37. Number of deposits on betting categorised by weekday, 2022

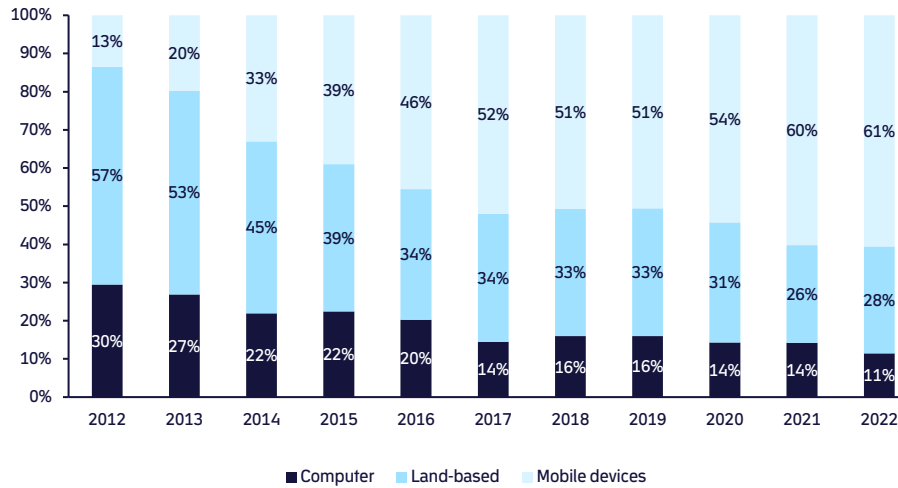


Source: the Danish Gambling Authority's gambling control system

In Denmark, you can bet both land-based, i.e., on-site such as at a kiosk or supermarket, and online via computers or mobile devices such as a telephone or a tablet. In 2022, 61 percent of the GGR for betting came from bets made on mobile devices, while 28 percent and 11 percent came from land-based betting and betting via computers, respectively. Since the

liberalisation of betting in 2012, the share of GGR coming from mobile devices has increased continuously. Conversely, the share of GGR from land-based betting and betting via computers now account for a lot less than in 2012.

Figure 38. GGR for betting categorised by sales channels, 2012-2022



Source: the Danish Gambling Authority's gambling control system

2.6 Online casino

In 2022, 41 operators were licensed to offer online casino. Five of the 41 licences were revenue-restricted, which is a type of licence that only applies for a year, and where the GGR cannot exceed DKK 1 million. A licence for online casino which is not restricted can apply for up to five years.

It varied greatly how much the licence holders achieved in GGR. 18 licence holders achieved a GGR of less than DKK 25 million, 10 licence holders achieved a GGR between DKK 25 and 100 million, while eight achieved a GGR of more than DKK 100 million.

-4%

Development in GGR for online casino from 2021 to 2022

Table 3. Licences for betting in Denmark in 2022 categorised by GGR

GGR (million DKK)	Number of licences
Less than 5	10
5 – 10	4
10 – 25	4
25 – 50	5
50 – 100	5
100 – 200	4
200 – 500	3
More than 500	1

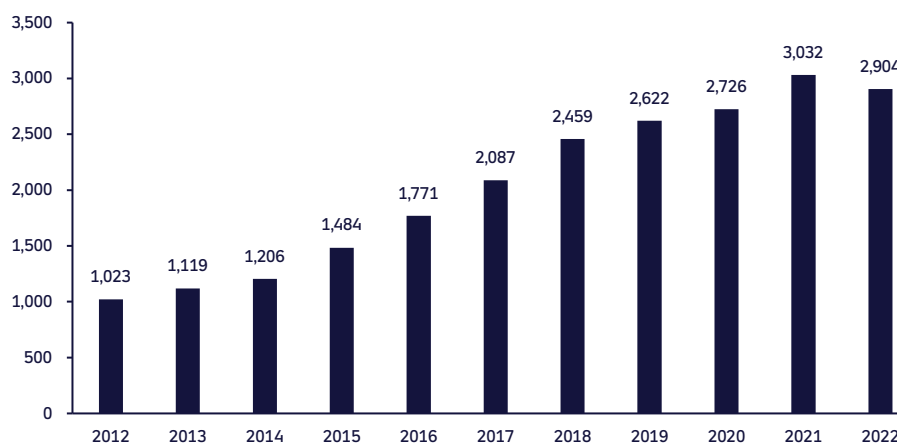
Source: the Danish Gambling Authority

Note: Revenue-restricted licences are not included

In 2022, the GGR for online casino amounted to DKK 2,904 million, corresponding to 29 per cent of the total gambling market. It is a year-on-year fall of DKK 128 million, corresponding to 4 per cent.

Online casino is the gambling sector with the biggest growth of GGR since 2012. Consequently, it has contributed to the overall increase in the gambling market in that period. Up until 2021, the GGR for online casino increased every year, but that trend stopped in 2022, when the GGR fell for the first time, cf. figure 39. From 2012 to 2022, the GGR increased by 184 per cent.

Figure 39. GGR for online casino, 2012-2022, million DKK

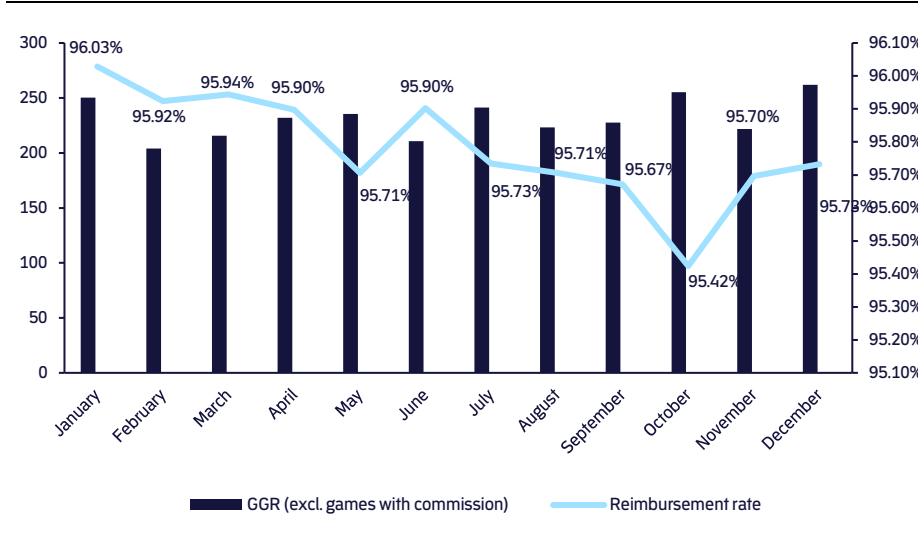


Source: Data on duties reported by licence holders to the Danish Tax Agency

Note: 2022-prices

The average reimbursement rate for online casino in 2022 was 95.78 percent, which is a little less than in 2021, when the rate was 96.03 percent. With 95.42 percent, October was the month with the lowest reimbursement rate, while January had the highest rate of 96.03 percent, cf. figure 40.

Figure 40. GGR (excluding games with commission), million DKK, and reimbursement rate for online casino in 2022



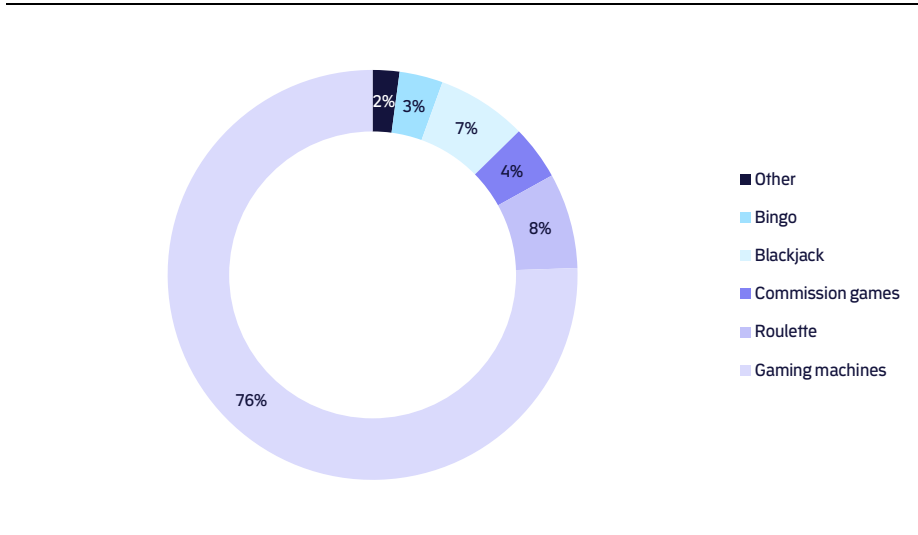
Source: Data on duties reported by licence holders to the Danish Tax Agency

Danes have a variety of games to choose from at online casinos. In 2022, the GGR from online gaming machines amounted to DKK 2,194 million, corresponding to 76 percent of the online casino market, cf. figure 41. Roulette and blackjack amounted to DKK 218 and 206 million in GGR, respectively, corresponding to 8 and 7 percent of the total GGR for the sector.

The GGR for commission games amounted to DKK 125 million, corresponding to 4 percent. Commission games are games where you play against other players and pay a commission to the gambling operator to participate. It includes, for example, multiplayer poker.

Finally, bingo and other types of games amounted to DKK 100 and 61 million, respectively, corresponding to 3 and 2 percent.

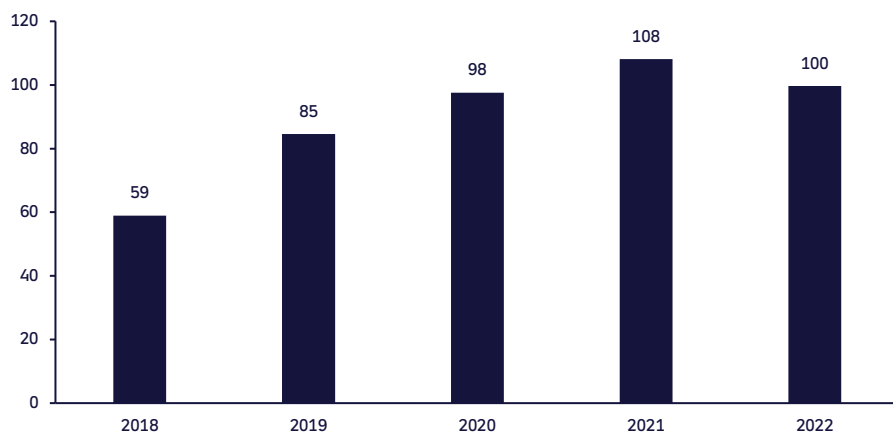
Figure 41. GGR for online casino in 2022 categorised by type of game



Source: the Danish Gambling Authority's gambling control system

Online bingo was liberalised in 2018. In 2018, the GGR was DKK 59 million, but has since then increased in accordance with the total online casino market up until 2022, when it fell, cf. figure 42. From 2018 to 2022, bingo’s share of the online casino market increased from 2.4 percent to 3.4 percent.

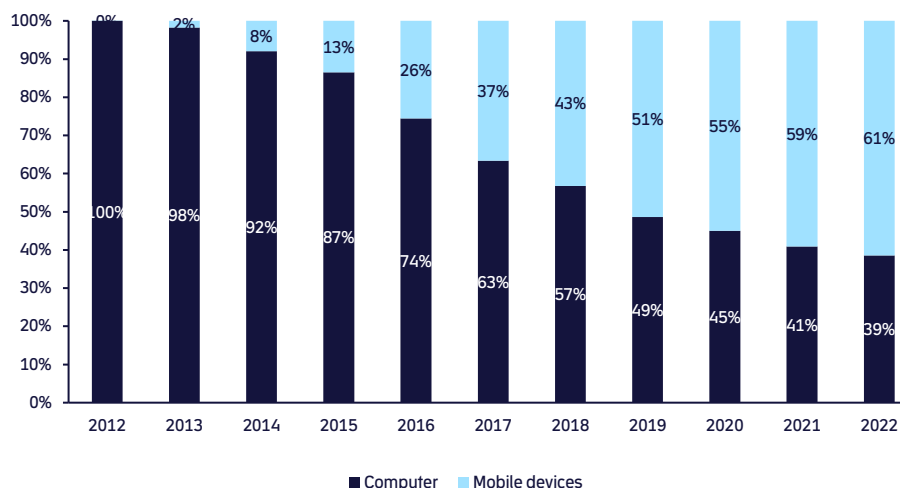
Figure 42. GGR for online bingo 2018-2022, million DKK



Source: the Danish Gambling Authority’s gambling control system
 Note: 2022-prices

Since 2012, Danes increasingly prefer gambling with online casinos on mobile devices, such as mobile phones and tablets, over computers. The trend continued in 2022, where the share of GGR for online casino coming from gambling on mobile devices increased to 61 percent, cf. figure 43. In 2012, almost all of the GGR was generated from gambling via computers.

Figure 43. GGR for online casino categorised by sales channels, 2012-2022



Source: the Danish Gambling Authority’s gambling control system

