

The Gambling Market in Numbers 2024

The Danish Gambling Authority's review of the
development of the gambling market in 2024

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Foreword

The Danish Gambling Authority continuously monitors and analyses the development of Danes' gambling behaviour, and we prioritise publishing figures and statistics about the development on our website. We do this in our monthly statistics in Power BI and in a number of reports and other publications.

In "The Gambling Market in Numbers 2024", we have collected the most important figures on the gambling market for the year and compare back to 2012, when the Danish gambling market was partially liberalised. The report reviews the development of the individual gambling areas, but also looks at trends across the areas. There are also statistics for ROFUS (Register of Self-Excluded Players) and the Danish Gambling Authority's helpline StopSpillet. In the report, you can read about how much money Danes spent on gambling in 2024, whether Danes prefer to gamble online or at physical locations, and who typically excludes themselves from gambling, among other things.

I hope you will benefit from "The Gambling Market in Numbers 2024".

On behalf of the Danish Gambling Authority,



Anders Dorph
Director



Introduction

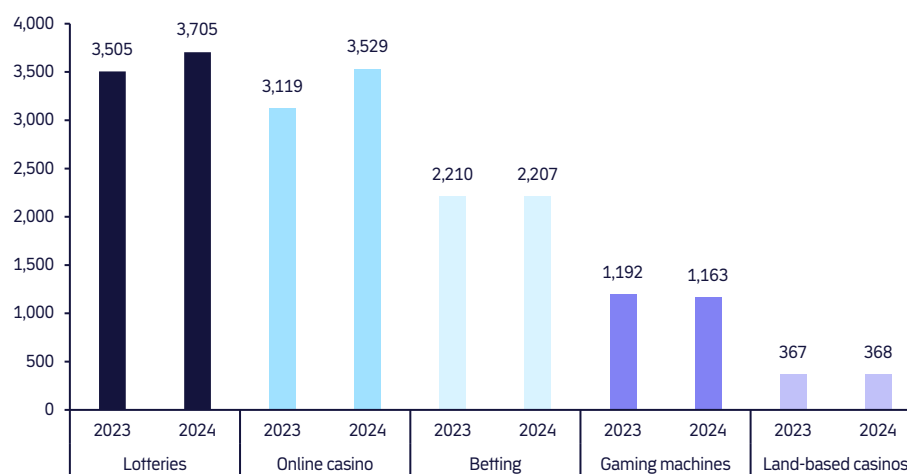
At the Danish Gambling Authority, it is a core task to continuously analyse the development of the gambling market. In "The Gambling Market in Numbers 2024", the overall statistical overview of the development in the gambling market is presented. In 44 figures and tables we show the development both in the individual gambling categories (betting, online casino, gaming machines, land-based casino and lotteries) and across categories, and follow the development since the partial liberalisation of the gambling market in 2012. We also present statistics for ROFUS (Register of Self-Excluded Players) and the Danish Gambling Authority's helpline StopSpillet.

Growth in the gambling market

The total Danish gambling market grew every year since the partial liberalisation in 2012 up to 2018 measured by gross gaming revenue (GGR), but in the years from 2019 to 2023, there has been a decrease every year compared to the previous years, where 2022 was an exception. This development should be seen in light of the fact that Covid-19 restrictions were in place in 2020, 2021 and 2022.

In 2024, the overall Danish gambling market experienced growth again with a GGR of DKK 11.0 billion compared to DKK 10.4 billion in 2023, which corresponds to an increase of 5.4 per cent. Four out of the five gambling categories saw growth from 2023 to 2024, with only betting having a slight decline, cf. Figure 1.

Figure 1. GGR for the Danish gambling market 2023-2024, DKK million



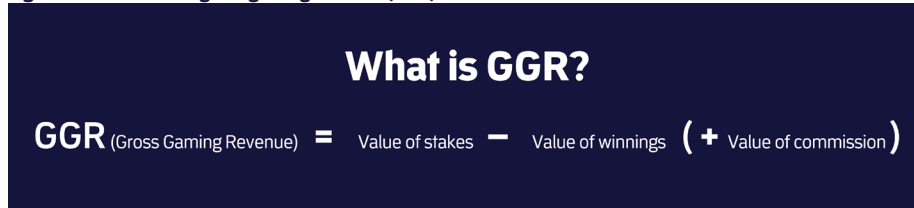
Source: Tax data reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Varelotteriet, Landbrugslotteriet and accounts from licences for charity lotteries
Note: 2024 prices

Use of the concept of gross gaming revenue (GGR)

In "The Gambling Market in Numbers 2024", gross gaming revenue (GGR) is consistently used as a measure of the size of the gambling market. The GGR is calculated as the players' stakes in games minus winnings plus the commission that players may have paid for participating in a game, cf. Figure 2. The GGR is thus a measure of how much the players lose to the gambling operators. Therefore, GGR is often referred to as gambling spend. However, it should be

noted that the GGR figure is higher than what players actually lose, as the bonuses that players use also count as stakes.

Figure 2. Calculation of gross gaming revenue (GGR)



What is GGR?

$$\text{GGR (Gross Gaming Revenue)} = \text{Value of stakes} - \text{Value of winnings} (+ \text{Value of commission})$$

GGR is used internationally among other countries' gambling authorities to calculate the size of the gambling markets. The GGR is also used as the basis for calculating the gambling tax that licence holders who offer betting, online casino, gaming machines and land-based casino must pay to the state.

Data basis for the report

"The Gambling Market in Numbers 2024" is based on several different data sources. This includes tax reports from the licence holders to the Danish Tax Agency and data submitted to the Danish Gambling Authority's gambling control system. Statistics for the monopoly lotteries come from these licence holders' direct reporting to the Danish Gambling Authority. Data from ROFUS and StopSpillet comes from internal systems in the Danish Gambling Authority. Statistics for the charity lotteries are based on the accounts submitted by the licence holders after the lottery has been held. Finally, data on the gambling markets in Europe and the channelisation rate comes from the research institute H2 Gambling Capital.

The data basis for the report may change. The latest updated figures for the gambling market can always be found in the monthly statistics on spillemyndigheden.dk.

Key figures for the gambling market in 2024

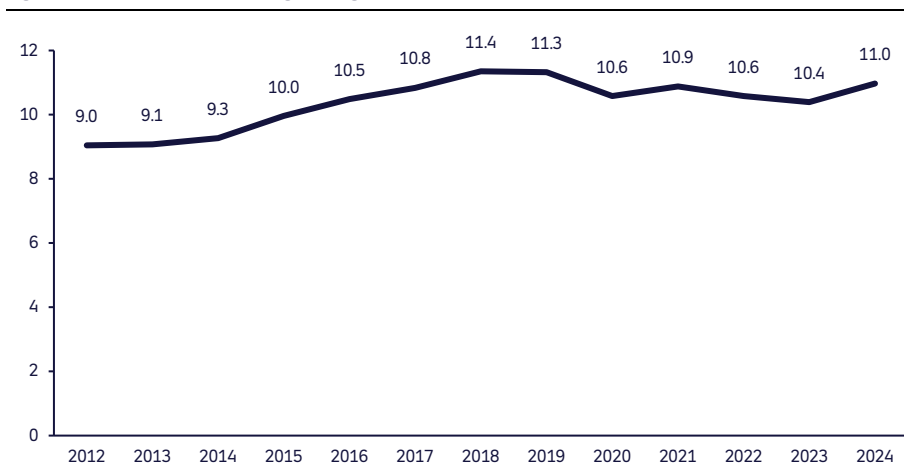
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1.1 The development of the gambling market in 2024

The total gambling market in Denmark amounted to DKK 11.0 billion in GGR in 2024, cf. Figure 3. This is an increase of DKK 578 million compared to 2023, corresponding to 5.6 per cent. Since 2012, the GGR has increased by DKK 1.9 billion, which corresponds to 21.3 per cent. In periods of 2020, 2021 and 2022, the gambling market was affected by Covid-19 restrictions, which led to the closure of restaurants, gambling halls and casinos, which had a negative impact on the GGR. In 2023 and 2024, there were no Covid-19 restrictions impacting the gambling market.

DKK 11.0
billion

Figure 3. GGR for the total Danish gambling market 2012-2024, DKK billion.

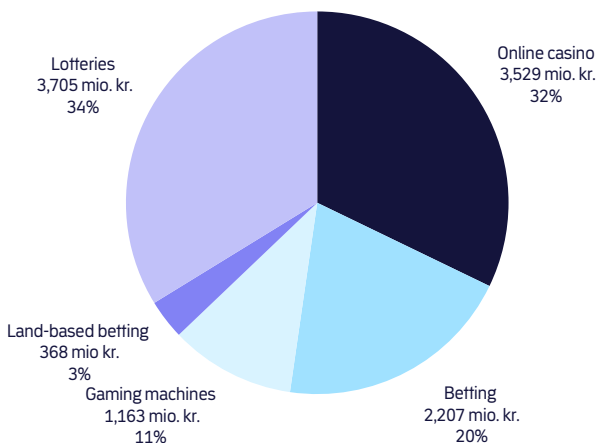


GGR for the gambling market in 2024

Source: Tax data reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Varelotteriet, Landbrugslotteriet and accounts from licences for charity lotteries
Note: 2024 prices

Measured by GGR, lotteries were, as in previous years, the largest gambling category in 2024 with DKK 3,705 million, corresponding to 34 per cent of the gambling market. cf. Figure 4. Online casino and betting together accounted for just over half of the gambling market, while gaming machines and land-based casinos were the smallest gambling categories, with market shares of 11 per cent and 3 per cent, respectively.

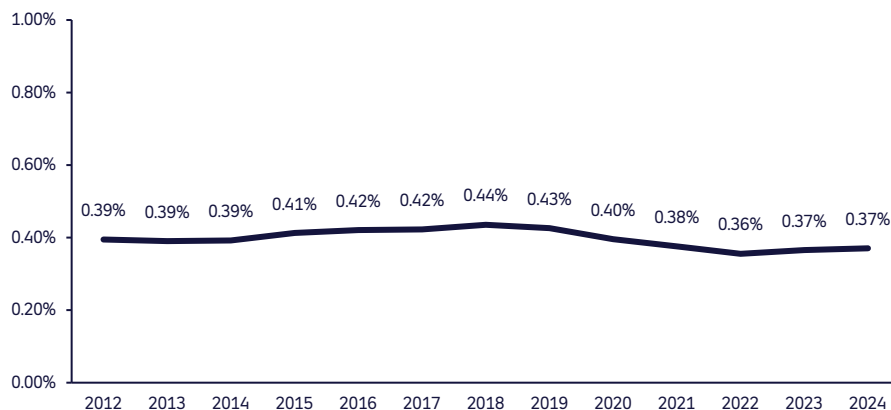
Figure 4. Market shares of gambling categories in 2024



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

The development of the gambling market must be seen in the context of how the overall Danish economy is developing. In 2024, the total GGR corresponded to 0.37 per cent of the Danish gross domestic product (GDP)¹.

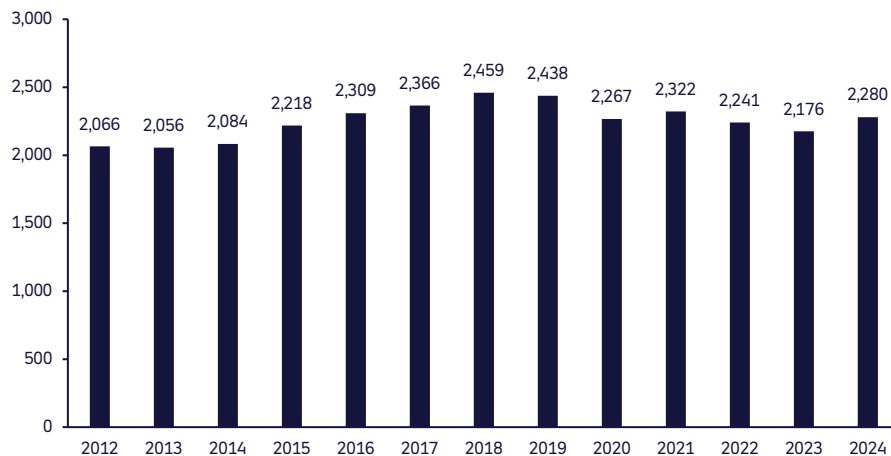
Figure 5. GGR for the total Danish gambling market relative to GDP 2012-2024



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

The development of the gambling market must also be seen in the context of population growth. In 2024, Danes spent an average of DKK 2,280 on gambling, cf. Figure 6. This is DKK 104 more than in 2023, corresponding to an increase of 4.8 per cent. Compared to 2012, spending per Dane in 2024 has increased by DKK 214, which corresponds to 10.3 per cent.

Figure 6. Average gambling spend per Dane over the age of 18 2012-2024



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

Note: Gambling spend is measured as GGR 2024 prices.

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

1.2 Gambling licenses in 2024

One of the Danish Gambling Authority's core tasks is to issue licences to offer gambling in Denmark.

In 2024, there were 967 licences for the provision of gambling on the Danish market during the year, cf. Table 1.

967

Licences to offer gambling in Denmark in 2024

In Denmark, there are four operators that have a monopoly on lotteries. However, there is no monopoly on land-based bingo², as well as lotteries that have a charitable purpose.

1,580 lotteries with a charitable purpose were held in 2024. 601 of the lotteries had received a licence from the Danish Gambling Authority. The remaining 979 lotteries were notified to the Danish Gambling Authority. Notifications cover charity lotteries with a turnover of less than DKK 20,000, which did not require a licence from the Danish Gambling Authority³.

There were 26 and 40 licences respectively for betting and online casino. Of these, three of the licences for betting and online casino, respectively, were revenue-restricted. A revenue-restricted licence is valid for one year and is conditional on the GGR not exceeding DKK 1 million. A licence for the provision of betting and online casino that is not restricted on revenue may be valid for up to five years.

In 2024, there were 289 licences to set up gaming machines in restaurants and gambling halls. In addition, there were seven licences to offer land-based casinos.

On spillemyndigheden.dk you can always see who is currently licensed to offer gambling in Denmark.

Table 1. Licences/notifications to offer gambling in Denmark in 2024

Gambling category	Number of licences/notifications
Betting	23
Betting – Revenue-restricted	3
Online casino	37
Online Casino - Revenue-restricted	3
Gaming machines	289
Land-based casinos	7
Monopoly lotteries	4
Charity lotteries – Licences	601
Charity lotteries – Notifications	979

Source: The Danish Gambling Authority

² The rules regarding land-based bingo offered on the liberalized market became effective from January 1, 2025.

³ Please note that new rules regarding charity lotteries became effective from January 1, 2025. Please see lotteriregler.dk

1.3 Men's Euro – The Danes gamble when Denmark plays

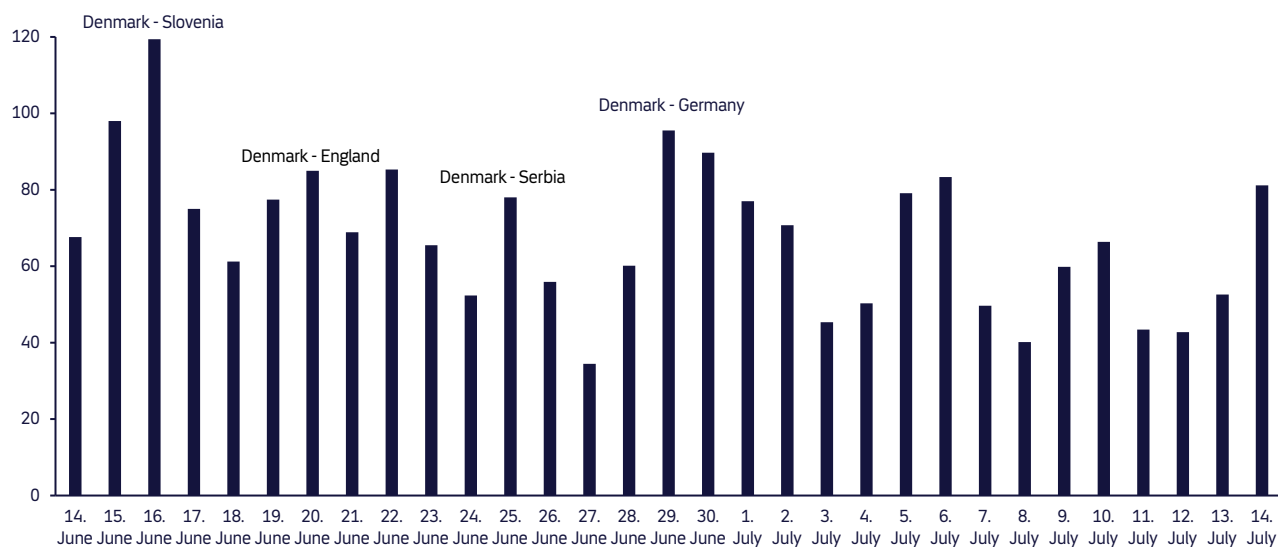
From 14 June to 14 July 2024, the European Championship in men's football was played, and many Danes chose to bet on the matches. Denmark participated in the tournament as one of the 24 countries, which left a clear mark on the Danes' gambling activity. During previous finals in football, where Denmark has participated, the betting activity has been greatest on the days when Denmark had played its matches, and the same trend applied during the European Championship in 2024.

The Danes' stakes on bets in the period were highest on 16 June, when Denmark played its first group match against Slovenia, cf. Figure 7. Here, the deposit was 128 per cent higher compared to 24 June, which was the day during the period of European Championship matches when the deposit was smallest.

The day with the second largest deposit on bets in the period was 15 June, which was the day before Denmark's first group match, while the day with the third largest deposit was 29 June, when Denmark played the round of 16 against Germany.

Between the group stages, round of eight, quarterfinals, semi-finals and final, there were days when European Championship matches were not played. Here, the stakes on bets were somewhat lower compared to days in the period when European Championship matches were played.

Figure 7. Stakes on bets in DKK million, 14 June – 14 July 2024



Source: The Danish Gambling Authority's gambling control system
 Note: The data in the figure is for the total betting market during the period.

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 physically at locations such as an arcade, restaurant, kiosk, etc.

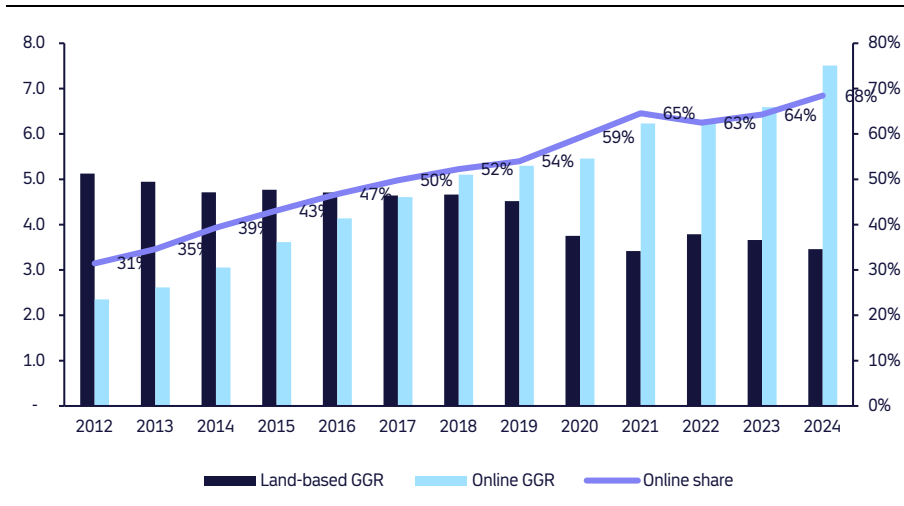
In 2024, 68 per cent of the total GGR came from online gambling, cf. Figure 8. This is an increase of 37 percentage points compared to 2012. It should be noted that land-based gambling in 2020-2022 was affected by Covid-19 restrictions, which meant that gambling halls and casinos were closed for periods, which affected the share of online gambling in those years.

Except for 2022, the share of GGR that comes from online gambling has been increasing every year since 2012. The land-based GGR has decreased since 2012, while the GGR from online gambling has increased. The increase in GGR that characterises the development of the Danish gambling market is therefore driven by the increase in online gambling.

68%

Share of GGR from online gambling in 2024

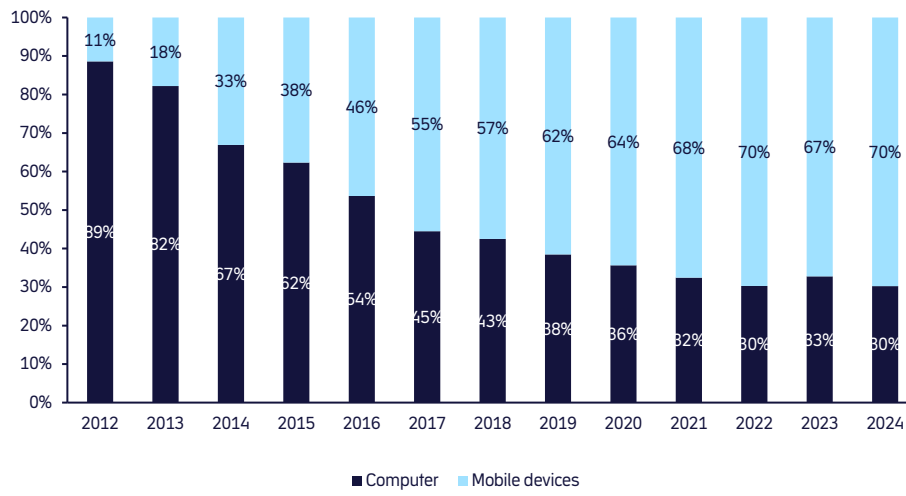
Figure 8. GGR in the gambling market by sales channels, DKK billion 2012-2024



Source: The Danish Gambling Authority's gambling control system, tax data reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Varelotteriet, Landbrugslotteriet and accounts from licences for charity lotteries

Online games can be played on the computer and mobile devices such as mobile phones and tablets. Since 2012, the share of GGR for online betting and online casino coming from mobile devices has increased from 11 per cent to 70 per cent. This development should also be seen in the context of the general technological development in Denmark, where it is becoming increasingly easier to buy and sell goods and services via mobile devices.

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



Source: The Danish Gambling Authority's gambling control system

1.5 Danes' gambling spend compared to Europe

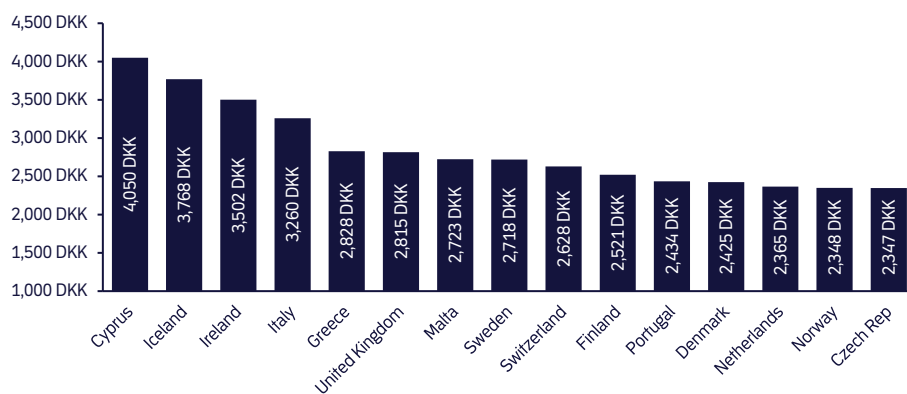
European countries vary from one another in terms of both the framework and the legal requirements for offering gambling, but also in relation to how much money the individual citizen spends on gambling on average.

In 2024, the average gambling spend per adult inhabitant in Denmark was the 12th highest in Europe, cf. Figure 10. At the same time, Denmark had the second lowest gambling spend per adult inhabitant in the Nordic region, as Iceland, Finland and Sweden were all higher. These figures also include the spending on online gambling sites that are not licensed in the countries in question. At DKK 4,050, Cyprus had the highest gambling spend per capita in 2024.

No. 12

In 2024, Denmark had the 12th highest gambling spend per capita in Europe

Figure 10. Top 15 countries in Europe with the highest average gambling spend per adult in 2024

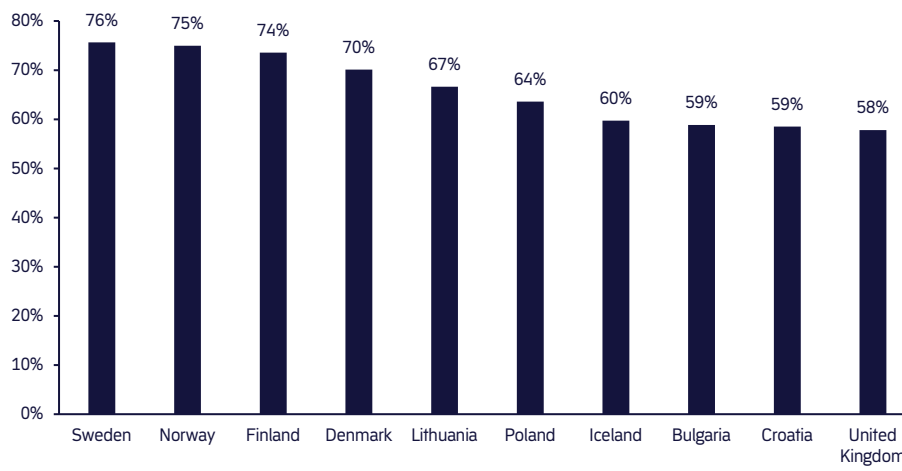


Source: H2 Gambling Capital. The data basis may change, which is why the figures may be updated later. The data was collected on 9 April 2025. Note: Gambling spend is measured as GGR. The figures include both the regulated markets and the unregulated online markets

There is a big difference between countries in how much of the gambling spend takes place online. If you include the spending that comes from gambling sites on the internet without a Danish licence, Denmark had the fourth largest share of gambling spend generated online in Europe in 2024, cf. Figure 11. With 76 per cent, Sweden had the largest share of gambling spend generated online. The large share of online gambling should be seen in the context of the fact that Denmark generally has a high degree of digitisation in an international perspective⁴.

⁴ See for example Digital Economy and Society Index (DESI) og Digital Decade report: <https://digital-strategy.ec.europa.eu/en/policies/desi>

Figure 11. Top 10 countries in Europe with the largest share of gambling spend generated online, 2024



Source: H2 Gambling Capital. The data basis may change, which is why the figures may be updated later. The data was collected on 9 April 2025.
 Note: Gambling spend is measured as GGR. The figures include both the regulated markets and unregulated online markets.

1.6 Development in channelisation rate

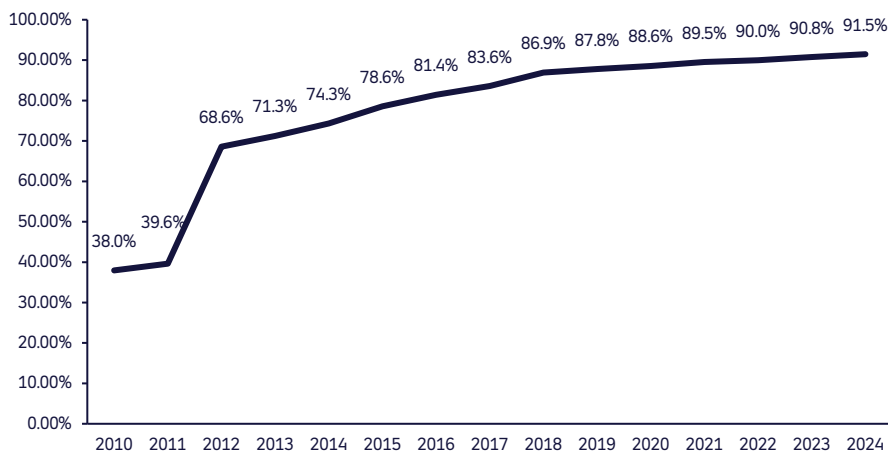
The Danish Gambling Authority continuously monitors the development of the channelisation rate in Denmark. The channelisation rate denotes the share of online gambling spend that comes from gambling operators who are licensed to offer gambling in Denmark. The channelisation rate thus shows how large a share of online gambling spend takes place on websites that must follow the Danish rules for the provision of gambling and pay gambling tax to the Danish state.

91.5%

Share of online gambling in Denmark at licensed sites in 2023

Before the liberalisation of betting and online casino on 1 January 2012, the channelisation rate was just under 40 per cent, and one of the purposes of the liberalisation was therefore to move part of the gambling spend to sites with a Danish licence to offer gambling. At the end of 2012, the channelisation rate had increased to almost 69 per cent, and in 2024 it was 91.5 per cent, which is a slight increase compared to 2023, when the channelisation rate was just under 91 per cent. *cf. Figure 12.*

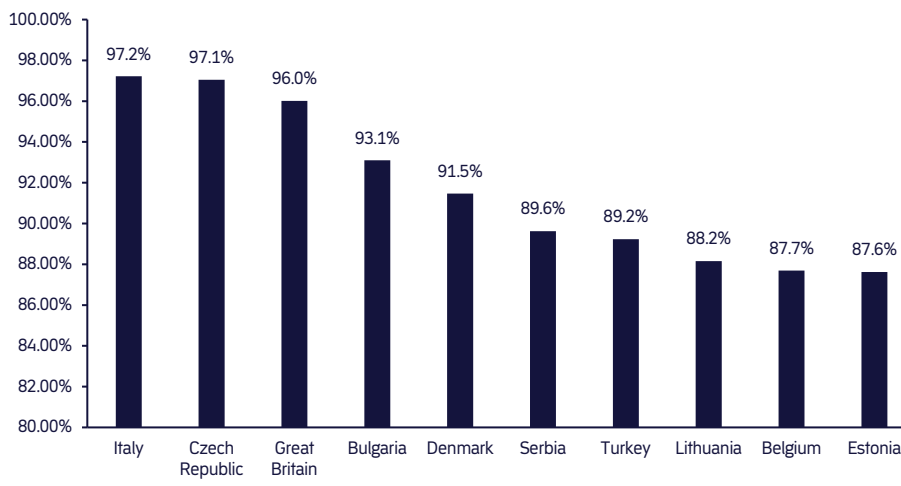
Figure 12. Online channelisation rate in Denmark, 2010-2024



Source: H2 Gambling Capital. The data basis may change, which is why the figures may be updated later. The data was collected on 9 April 2025.

As in previous years, the degree of channelisation in Denmark in 2024 was among the highest in Europe. To be precise, Denmark had the fifth highest channelisation rate in Europe, *cf. Figure 13.*

Figure 13. Top 10 European countries with the highest online channelisation rate in 2024



Source: H2 Gambling Capital. The data basis may change, which is why the figures may be updated later. The data was collected on 9 April 2025.

1.7 ROFUS – Register of Self-Excluded Players

The Danish Gambling Authority administers ROFUS (Register of Self-Excluded Players), where Danish players can exclude themselves from online gambling, betting in land-based stores and gambling at land-based casinos either temporarily for 24 hours, one, three or six months or permanently. A permanent exclusion means that you can be removed from the register after one year at the earliest.

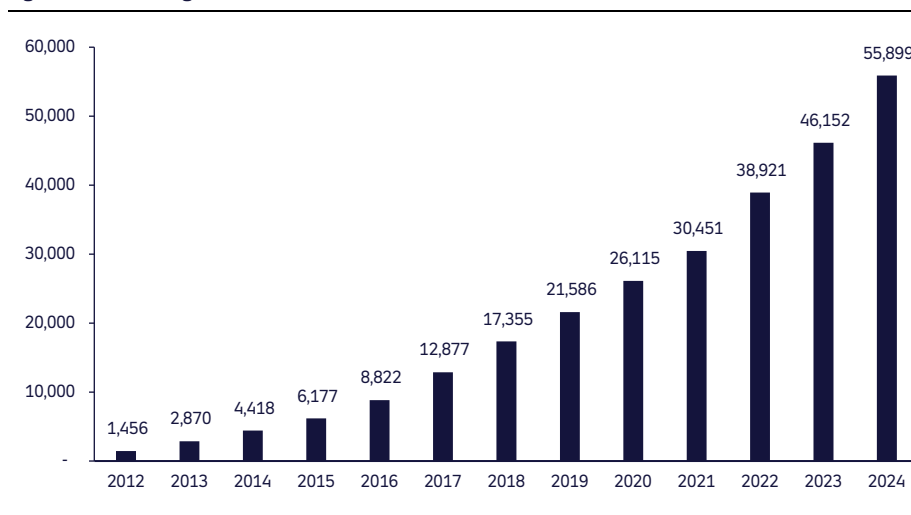
It is mandatory for gambling operators who have a licence from the Danish Gambling Authority to refer to ROFUS in their marketing. This helps to ensure that Danish players are aware of the possibility of excluding themselves from gambling.

At the end of 2024, 55,899 Danes were registered in ROFUS, cf. Figure 14. This is an increase of almost 10,000 Danes compared to the end of 2023, when 46,152 Danes were registered. Since ROFUS was established in connection with the partial liberalisation of the gambling market in 2012, there has been an increase in the number of registered Danes every year.

55,899

Number of registered persons in ROFUS at the end of 2024

Figure 14. Persons registered with ROFUS 2012-2024



Source: The Danish Gambling Authority

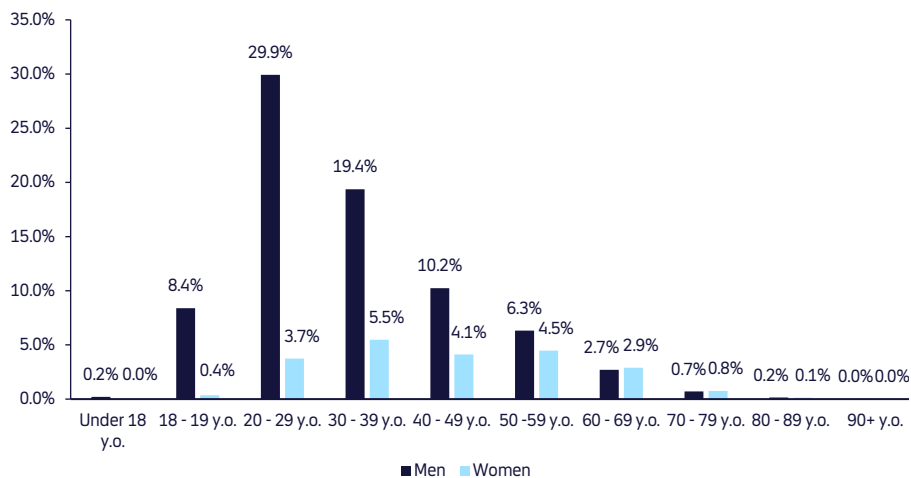
Note: The data set includes both players who are temporarily and permanently excluded. For 2012-2019 and 2023-2024, the data is collected on 1 January the following year, for 2020 and 2021 on 31 December and for 2022 on 5 January 2023. The figure therefore only indicates how many registered people there were on the day the data was collected. The 24-hour temporary exclusion category is only included for 2023 and 2024, as these figures are not available for the other years.

It has been the trend since the establishment of ROFUS that most of the registered individuals are men.

On 1 January 2025, 43,624 of the registered individuals were men, corresponding to 78 per cent, cf. Figure 15. At the same time, there is also a tendency for young people to exclude themselves from gambling, as 67 per cent of those registered were under 40 years of age. 39 per cent of those registered were men under the age of 30.

Although young people under the age of 18 cannot gamble neither online nor in land-based stores or casinos, there were still 118 people under 18 years old who were registered in ROFUS as of 1 January 2025, corresponding to 0.2 per cent of all registered. Some may register while under 18 to avoid gambling when they turn 18.

Figure 15. Persons registered with ROFUS by sex and age, 1 January 2025

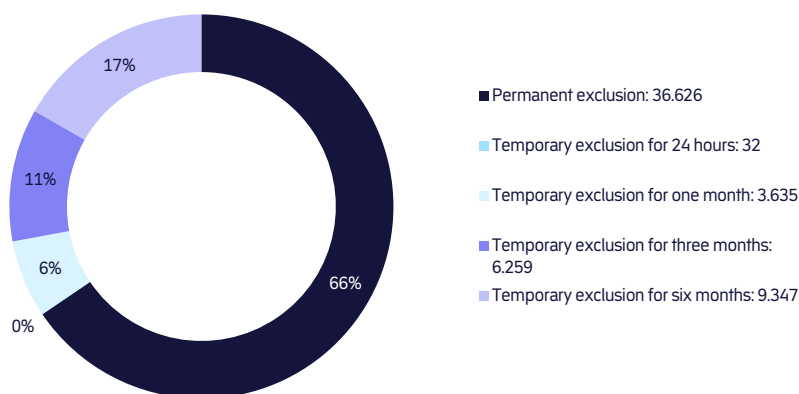


Source: The Danish Gambling Authority

Most registered persons in ROFUS have excluded themselves permanently, which is a trend that has always characterised ROFUS and which as of 1 January 2025 applied to 36,626 registered persons, corresponding to 66 per cent. cf. Figure 16.

Of the temporary exclusion types, 9,347 had chosen six months, corresponding to 17 per cent. 6,259 registered persons had chosen 3 months of exclusion, corresponding to 11 per cent, while 3,635 persons, corresponding to 6 per cent, had excluded themselves for a single month. 32 people were excluded for 24 hours.

Figure 16. Persons registered with ROFUS by exclusion type, 1 January 2025



Source: The Danish Gambling Authority

1.8 StopSpillet – Helpline on gambling addiction

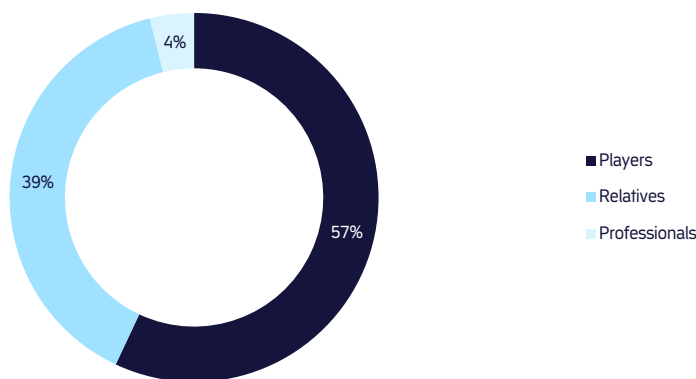
StopSpillet is the Danish Gambling Authority’s helpline where players, relatives and professionals can call or write via a chat to get advice and guidance on gambling addiction and responsible gambling.

544

In 2024, StopSpillet received 544 inquiries. This is a minor increase compared to 2023, when StopSpillet received 520 inquiries. Most inquiries to StopSpillet are from players, which was the case for 310 of the inquiries in 2024, corresponding to 58 percent. *cf. Figure 17.* 213 inquiries came from relatives, corresponding to 39 per cent, while 21 inquiries came from professionals, corresponding to 4 per cent.

Inquiries to StopSpillet in 2024 from players, relatives and professionals

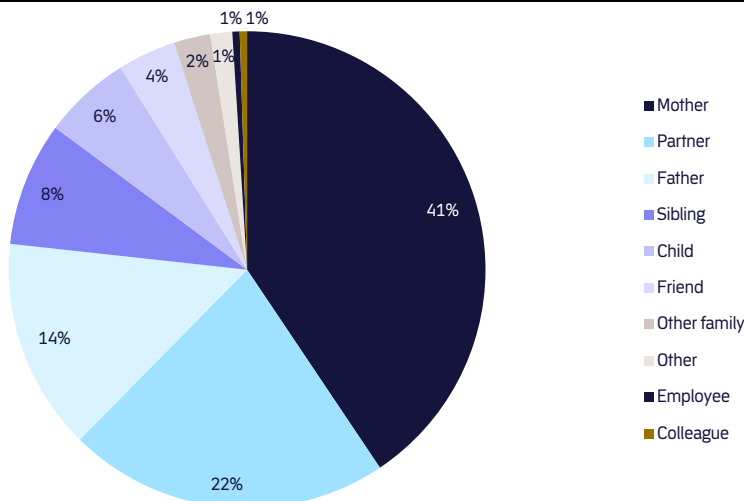
Figure 17. Distribution of StopSpillet inquiries in 2024



Source: The Danish Gambling Authority

When relatives contact StopSpillet, in more than half of the cases, it is a parent of the player who calls or writes, *cf. Figure 18.* In 2024, 41 per cent and 14 per cent of the inquiries from relatives came from a mother and a father, respectively. 22 per cent of the inquiries came from a partner, while the remaining came from a sibling, child, friend, other family, employer, colleague or others.

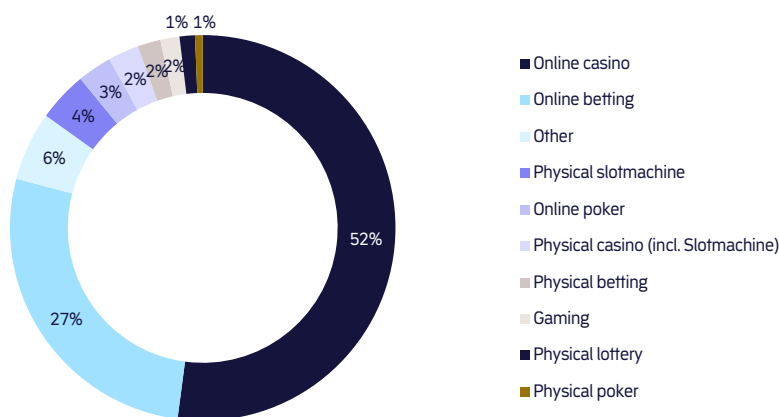
Figure 18. Inquiries from relatives to StopSpillet in 2024 by relation



Source: The Danish Gambling Authority

During the conversation with the players, StopSpillet's advisers ask about which types of gambling are the source of the players' problem gambling. Most people who contact StopSpillet state online gambling as the source of their problem gambling. In the inquiries in 2024, online casino and online betting accounted for 52 per cent and 27 per cent of the specified types of gambling, respectively. *cf. Figure 19.* StopSpillet also had conversations with players who gambled on land-based gaming machines, online poker, land-based casino, land-based betting, gambling related to gaming, land-based lottery, land-based poker and more.

Figure 19. Players' problem games, 2024 Inquiries

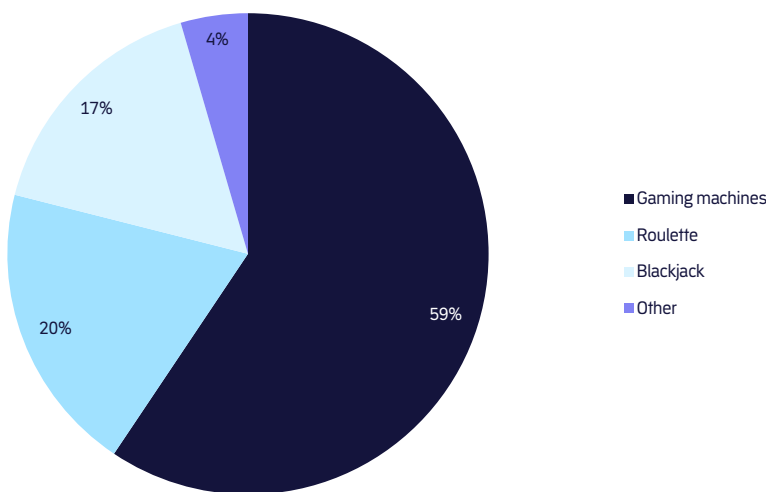


Source: The Danish Gambling Authority

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

If a player specifies online casino, StopSpillet's advisers also ask about which types of online casino games the player uses the most. 59 per cent of the players gamble on online gaming machines, while 20 per cent and 17 per cent respectively play roulette and blackjack.

Figure 20. Players' preferred online casino games, 2024 inquiries



Source: The Danish Gambling Authority

The development of the gambling categories in 2024

2

2.1 Charity lotteries

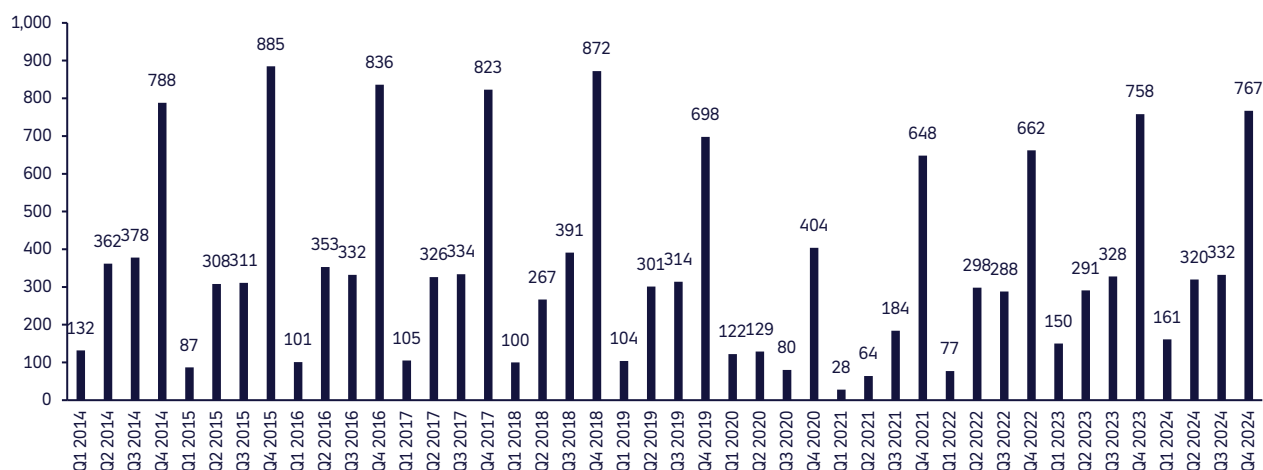
In Denmark, there is a monopoly on offering lotteries, with the exception of land-based bingo as well as lotteries that have a charitable purpose. In 2024, 1,580 lotteries were held for charitable purposes. 979 of the lotteries were notified to the Danish Gambling Authority. These are lotteries with a turnover of DKK 20,000 or less, and which therefore did not need a licence from the Danish Gambling Authority. The remaining 601 lotteries had been licensed by the Danish Gambling Authority⁵.

1,580

Charity lotteries held in 2024

The 1,580 charity lotteries in 2024 are an increase compared to 2023, when 1,527 were held. 767 of the charity lotteries in 2024 took place in the fourth quarter, corresponding to 49 per cent, cf. Figure 21. Many of the lotteries are held at the end of the year, which is a trend that has also been true in previous years. This is because many associations want to hold lotteries in connection with Christmas.

Figure 21. Charity lotteries held in 2014-2024 (includes both notifications and licences)

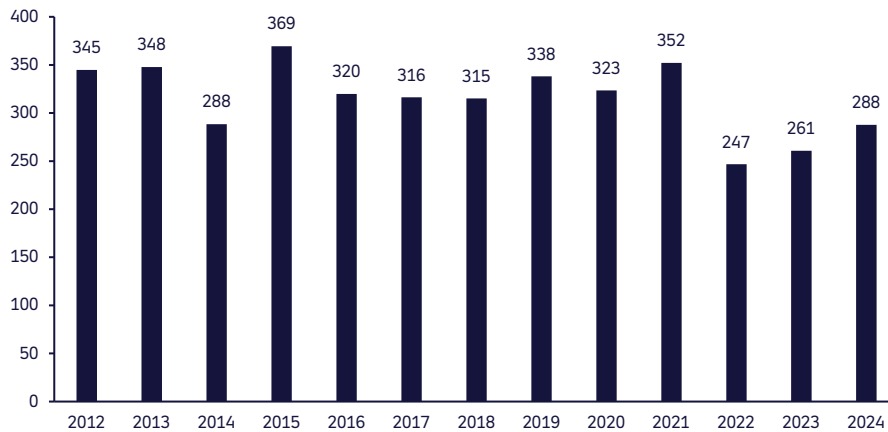


Source: The Danish Gambling Authority

In 2024, the GGR for the charity lotteries amounted to DKK 288 million. This is an increase of DKK 27 million compared to 2023, which corresponds to 10 per cent. cf. Figure 22.

Figure 22. GGR for charity lotteries, DKK million, 2012-2024

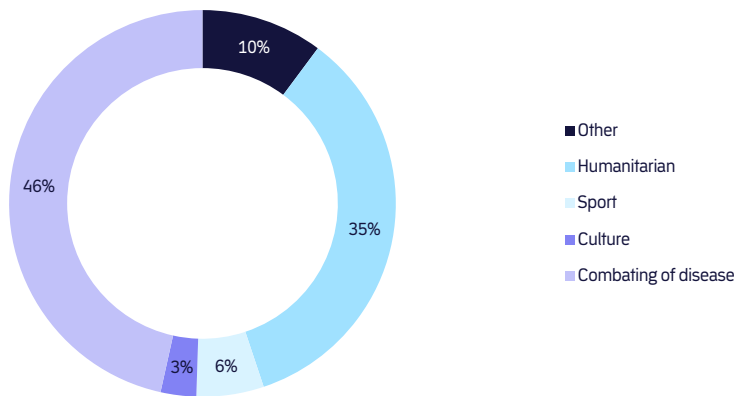
⁵ Please note that new rules regarding charity lotteries became effective from January 1, 2025. Please see lotteriregler.dk



Source: Accounts from licences for charity lotteries
 Note: 2024 prices. The GGR in 2024 is a preliminary estimate. Only GGR from licences for charity lotteries is included.

Charity lotteries are held for the benefit of many different purposes. In 2024, lotteries with profits going to the combating of disease accounted for approximately 49 per cent of the GGR for the area, while lotteries with humanitarian purposes accounted for 35 per cent, *cf. Figure 23*. The smallest charity lotteries, measured by their GGR, are those held for the benefit of sporting and cultural purposes. They accounted for 6 and 3 per cent of the total GGR for the charity lotteries in 2024, respectively.

Figure 23. GGR for charity lotteries in 2024 by purpose



Source: Accounts from licences for charity lotteries
 Note: The GGR in 2024 is a preliminary estimate. Only GGR from licences for charity lotteries is included.

2.2 Monopoly lotteries

In Denmark, there is a monopoly on offering lotteries, with the exception of land-based bingo as well as lotteries with a charitable purpose.

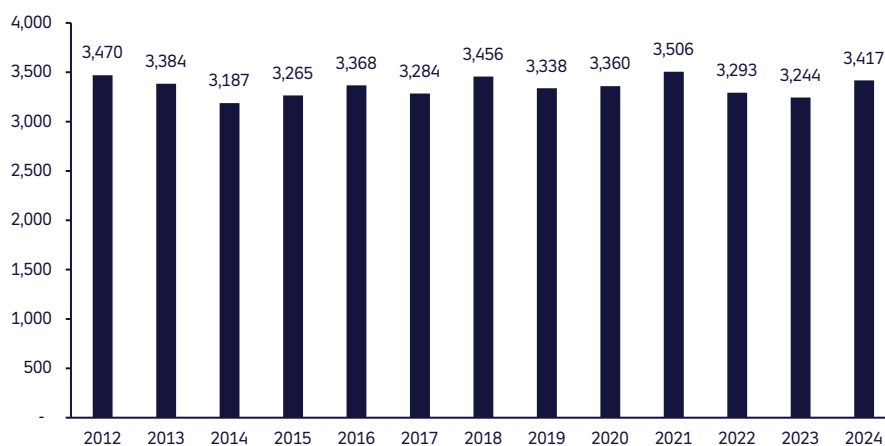
In 2024, the total GRGR for the monopoly lotteries (Danske Lotteri Spil A/S, Det Danske Klasseslotteri A/S, Varelotteriet and Landbrugslotteriet) amounted to DKK 3,417 million. This is an increase of DKK 173 million compared to 2023, corresponding to 5.3 per cent. Thus, charity lotteries and monopoly lotteries together accounted for 34 per cent of the total Danish gambling market in 2024.

5.3%

Increase in the GGR of monopoly lotteries from 2023 to 2024

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 24. During the period, the GGR has fluctuated between DKK 3,187 million in 2014 to DKK 3,506 million in 2021.

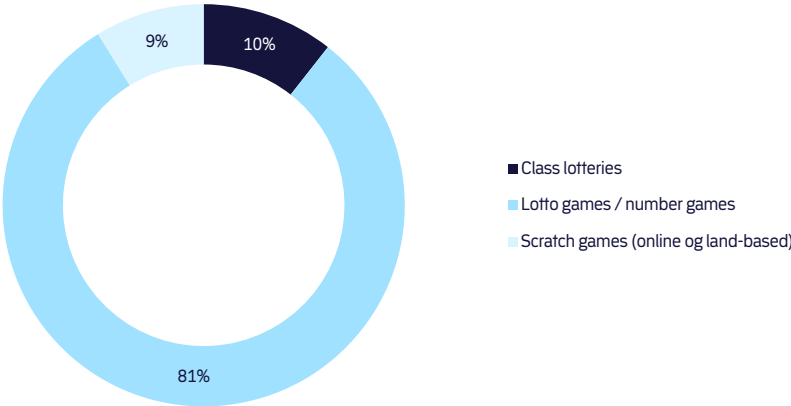
Figure 24. GGR for monopoly lotteries 2012-2024, DKK million



Source: Danske Spil A/S, Varelotteriet and Landbrugslotteriet
 Note: 2024 prices

As in previous years, the GGR for lotto/number games also in 2024 accounted for the vast majority of the total GGR for the area, cf. Figure 25. To be precise, the GGR for these game types, which include Lotto, Vikinglotto, Joker, Eurojackpot, Alt Eller Intet and Keno, amounted to DKK 2,754 million, corresponding to 81 per cent of the total GGR for the monopoly lotteries. The total GGR of the three class lotteries amounted to DKK 362 million, corresponding to 10 per cent, while scratch cards (both online and land-based) amounted to DKK 301 million, corresponding to 9 per cent.

Figure 25. Share of GGR for monopoly lotteries by game type, 2024



Source: Danske Spil A/S, Varelotteriet and Landbrugslotteriet

2.3 Land-based casinos

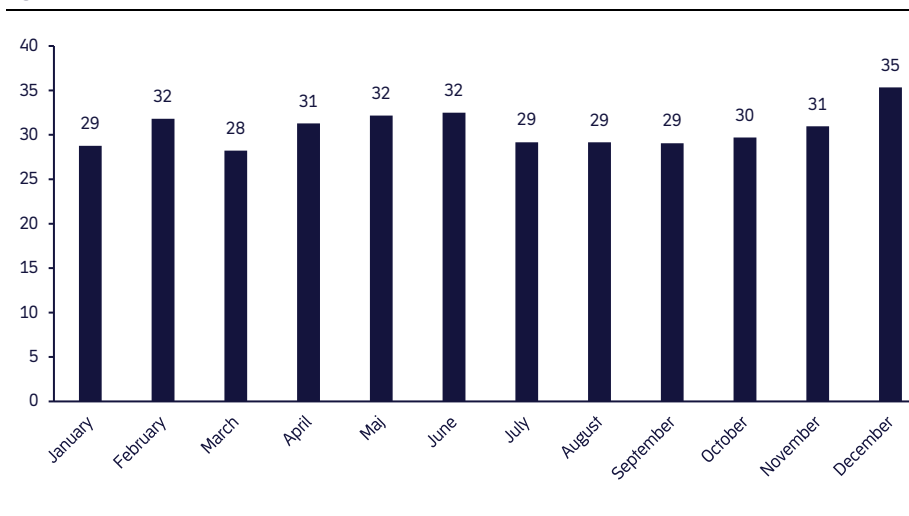
In 2024, the GGR for land-based casinos amounted to DKK 368 million, which is an increase of DKK 1 million compared to 2023, corresponding to 0.3 per cent. Land-based casinos thus accounted for 3 per cent of the total Danish gambling market in 2024 and were the smallest gambling area measured by GGR.

0.3%

The average monthly GGR was DKK 31 million. March was the month with the lowest GGR with DKK 28 million, while December had the highest GGR with DKK 35 million.

Increase in GGR for land-based casinos from 2023 to 2024

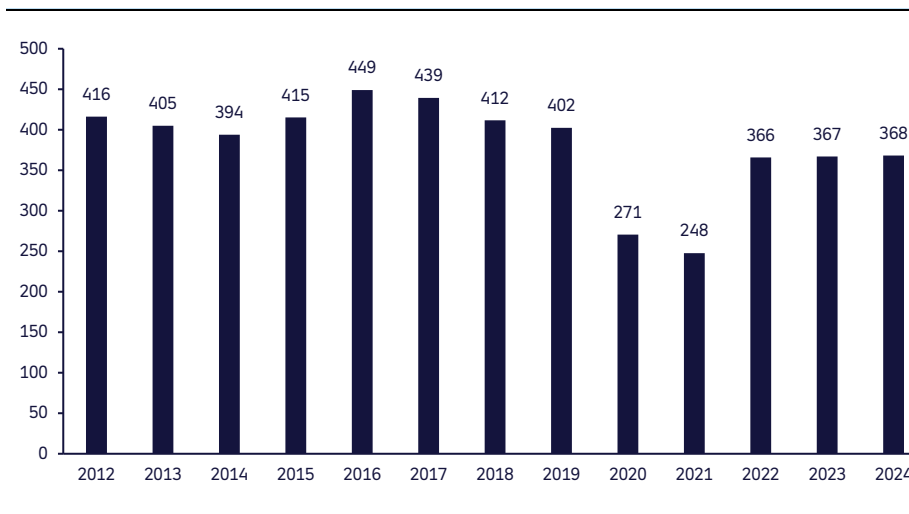
Figure 26. GGR for land-based casinos in 2024, DKK million



Source: Tax data reported by licence holders to the Danish Tax Agency

Between 2012 and 2019, the annual GGR for land-based casinos varied between DKK 394 and 449 million. From 2012 to 2024, the GGR for land-based casinos has fallen by 12 per cent.

Figure 27. GGR for land-based casinos 2012-2024, DKK million



Source: Tax data reported by licence holders to the Danish Tax Agency
 Note: 2024 prices

2.4 Gaming machines

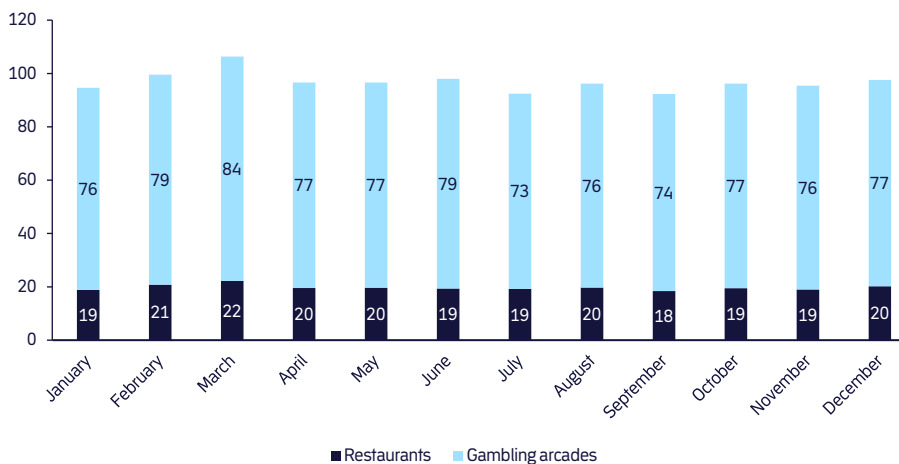
In 2024, the GGR for gaming machines amounted to DKK 1,162 million, which is a decrease of DKK 30 million compared with 2023, corresponding to 2.5 per cent. This means that gaming machines accounted for 11 per cent of the total Danish gambling market in 2024.

-2.5%

Most of the GGR comes from gaming machines set up in arcades, cf. Figure 28. In 2024, the GGR for these machines accounted for 80 per cent of the market, while the gaming machines set up in restaurants accounted for 20 per cent. Per. On 31 December 2024, the gaming machines were distributed in 1,093 restaurants and 801 arcades.

Decrease in GGR for gaming machines from 2023 to 2024

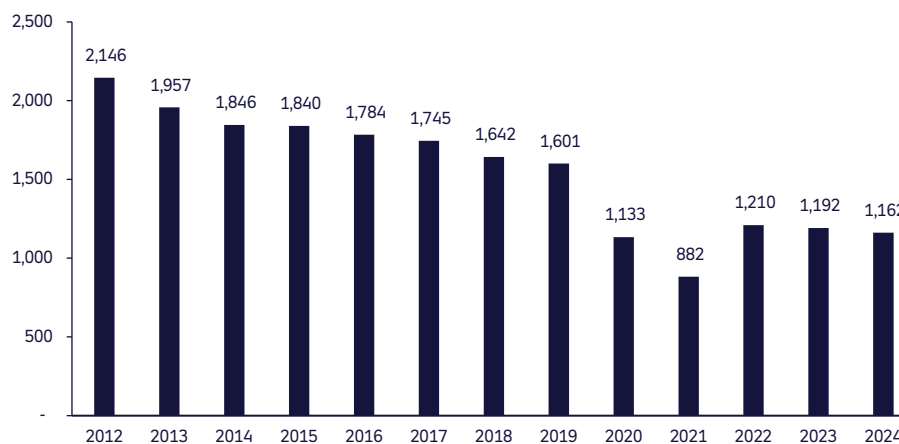
Figure 28. GGR for gaming machines in 2024 by restaurants and arcades, DKK million.



Source: Tax data reported by licence holders to the Danish Tax Agency

The market for gaming machines has been characterised by a decline in the GGR since 2012, when the gambling market in Denmark was partially liberalised. cf. Figure 29. The decline was amplified in 2020-2022 as a result of Covid-19 restrictions, which meant that restaurants and gambling halls were closed for periods. From 2012 to 2024, the GGR has fallen by 45.9 per cent.

Figure 29. GGR for gaming machines 2012-2024, DKK million

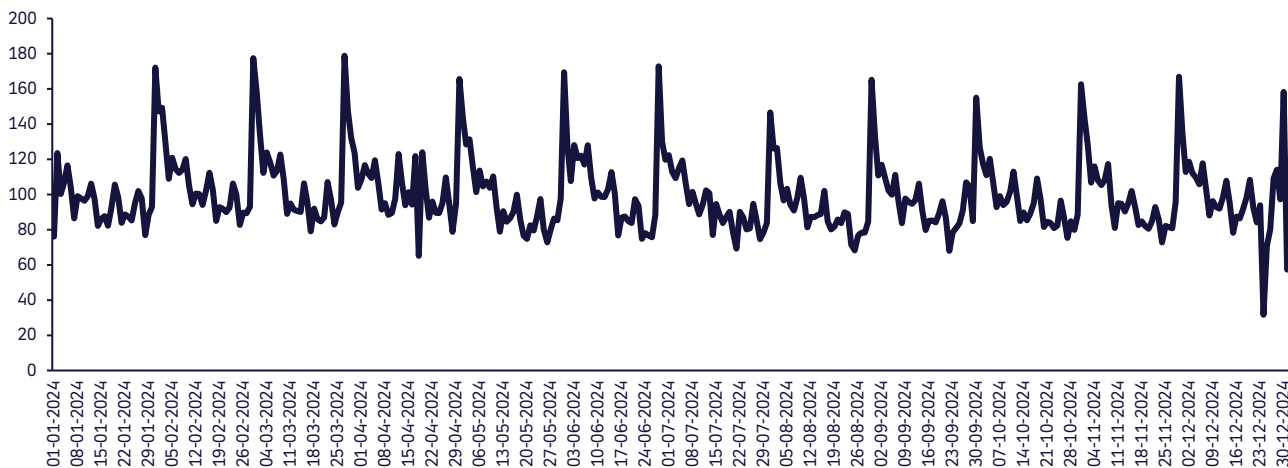


Source: Tax data reported by licence holders to the Danish Tax Agency
 Note: 2024 prices

Activity on the gaming machines in 2024 was greatest on paydays. The Danes gambled the most on the gaming machines on the last weekday of the month, when most Danes have a payday, cf. Figure 30.

Wednesday 27 March was the day in 2024 when Danes came the most money into the gaming machines, while 24 Tuesday December was the day when the least money came into the gaming machines.

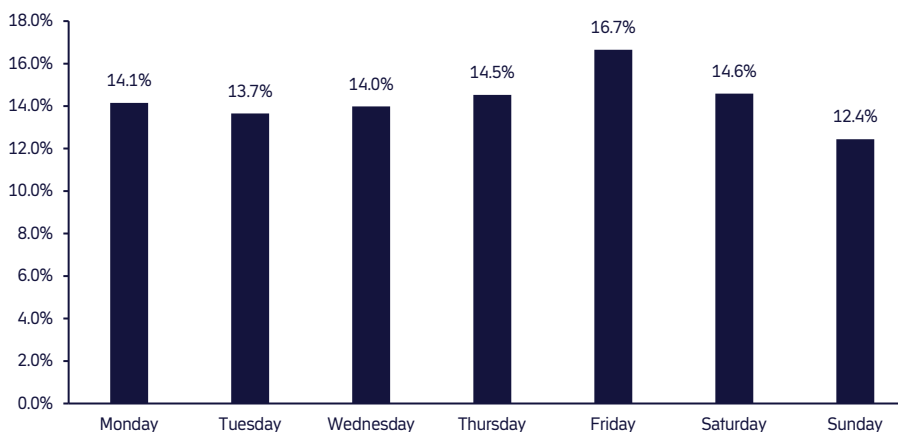
Figure 30. Indexed daily development in Danish kroner into gaming machines in 2024



Source: Fee and control data submitted to the Danish Gambling Authority

Danes gamble the most on gaming machines on Fridays. To be precise, gambling activity on Fridays accounted for just under 17 per cent of the total amount that came into the gaming machines in 2024, cf. Figure 31. Sundays were the day of the week in 2024 with just over 12 per cent when gambling activity was lowest.

Figure 31. Danish kroner into gaming machines by day of the week in 2024

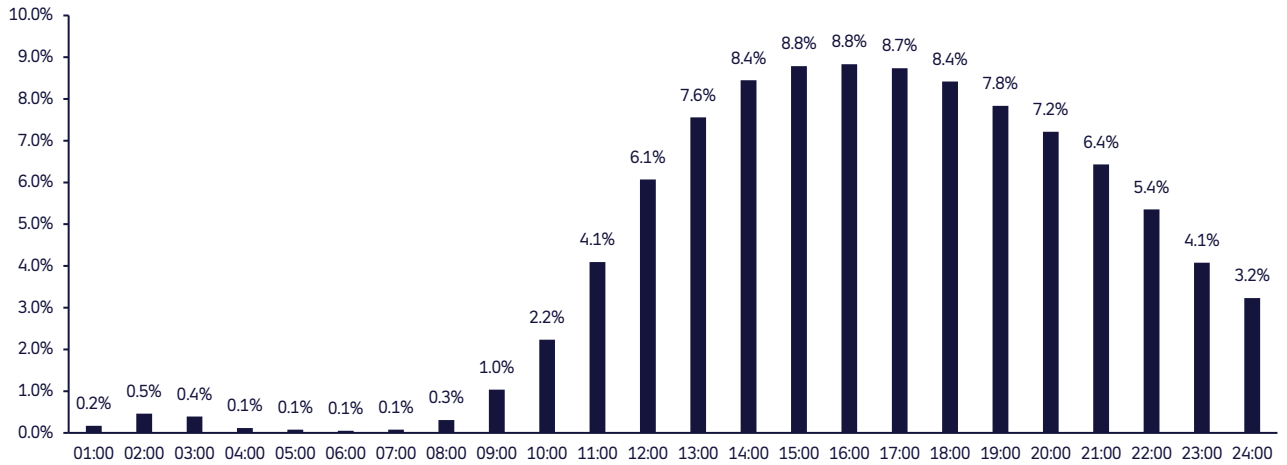


Source: Fee and control data submitted to the Danish Gambling Authority

It is possible to gamble on gaming machines in restaurants around the clock while it is not possible to gamble on gaming machines set up in arcades between 12 pm and 7 am, as the arcades must be closed during this time. The gambling activity in the first seven hours of the day therefore accounted for only just over one percent of the total activity in 2024. Instead, the Danes mostly gamble in the afternoon and early evening, cf. Figure 32. Thus, the amount

that came in between 12 noon and 8 p.m., accounted for 66 per cent of the total amount that came into the machines in 2024.

Figure 32. Danish kroner into gaming machines according to the hours of the day in 2024



Source: Fee and control data submitted to the Danish Gambling Authority

2.5 Betting

In 2024, 26 operators were licensed to offer betting in Denmark. Three of the 26 licences were revenue-restricted, which is a special form of licence that is valid for one year, and where the GGR must not exceed DKK one million. A non-revenue-restricted betting licence can be valid for up to five years.

There was great variation in how much the licence holders achieved in the GGR. 12 licence holders had a GGR of less than DKK 25 million, six licence holders achieved a GGR of between DKK 25 and 100 million, while five achieved a GGR of more than DKK 100 million.

-0.2%

Decrease in GGR for betting from 2023 to 2024

Table 2. Licences for betting in 2024 according to GGR

GGR (DKK million)	Number of licences
Under 5	5
5 – 10	1
10 – 25	6
25 – 50	3
50 – 100	3
100 – 200	2
200 - 500	2
Over 500	1

Source: The Danish Gambling Authority.

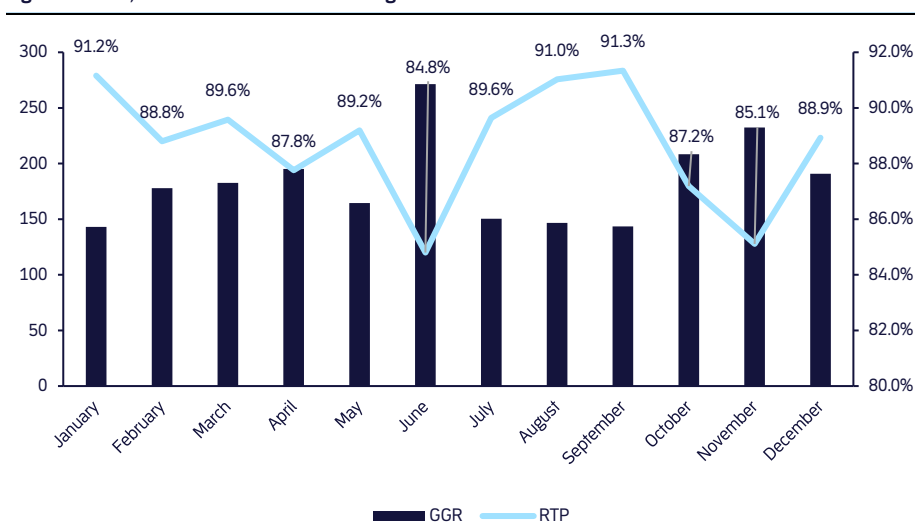
Note: Revenue-restricted licences are not included.

In 2024, the GGR for betting amounted to DKK 2,207 million. This is a decrease of DKK 4 million compared to 2023, corresponding to 0.2 per cent. Thus, betting accounted for 20 per cent of the total Danish gambling market in 2024.

The RTP affects the size of the gambling operators' GGR. The RTP is an expression of how large a share the players on average get in winnings when they play. An average RTP of 90 per cent means, for example, that the player receives an average of DKK 90 when DKK 100 has been staked in a bet.

In 2024, the average RTP was 88.7 per cent. It varied during the year between 84.8 per cent in June and 91.3 per cent in September. *cf. Figure 33.*

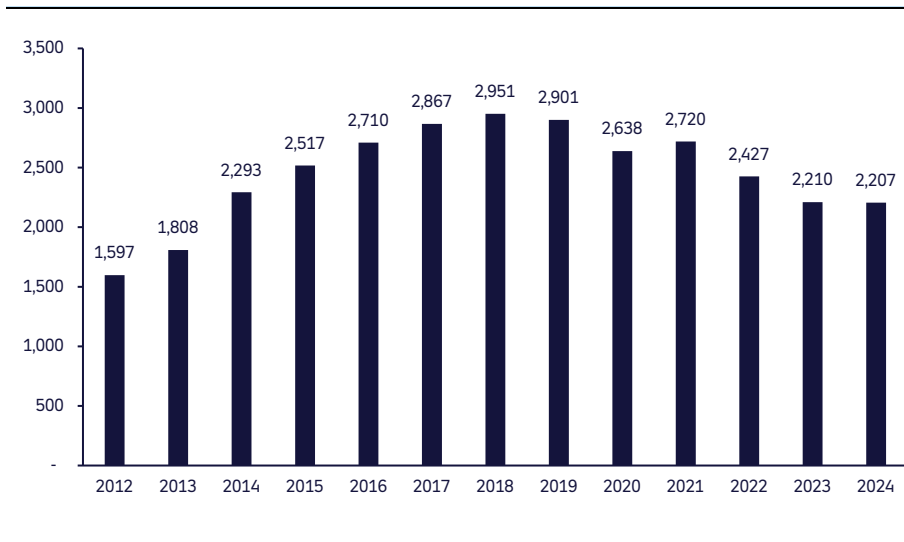
Figure 33. GGR, DKK million and RTP for betting in 2024



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

Following the liberalisation in 2012, the betting market experienced an annual increase in GGR up to 2018, after which it has decreased, cf. Figure 34. Compared to 2012, however, the GGR has increased 38 per cent in 2024.

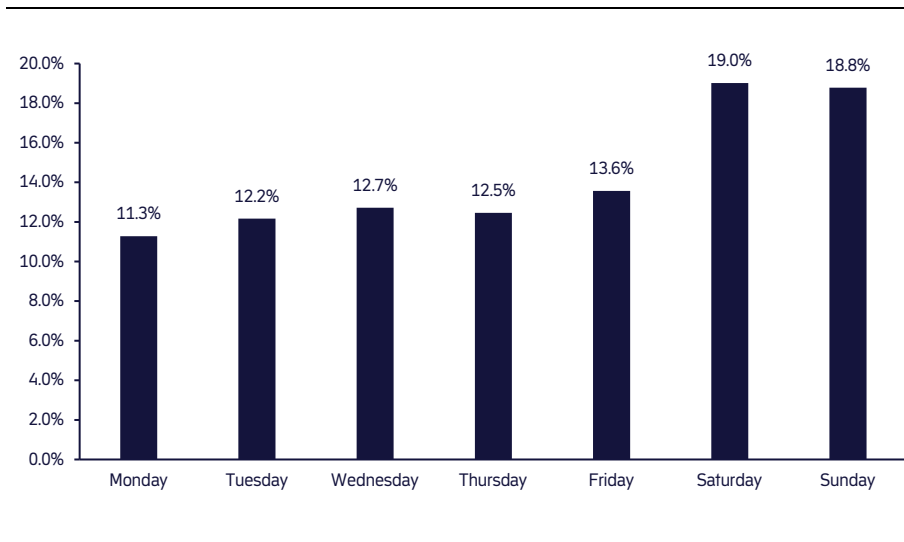
Figure 34. GGR for betting 2012-2024, DKK million



Source: Data on duties reported by licence holders to the Danish Tax Agency
 Note: 2024 prices

It is possible to bet on football matches and other sports every day of the year. However, bets are mostly placed on weekends. In 2024, 38 per cent of the stake on bets was thus placed on Saturdays and Sundays, cf. Figure 35. This should be seen in the context of the fact that many matches in European football are played on these days of the week.

Figure 35. Deposits on bets by days of the week, 2024



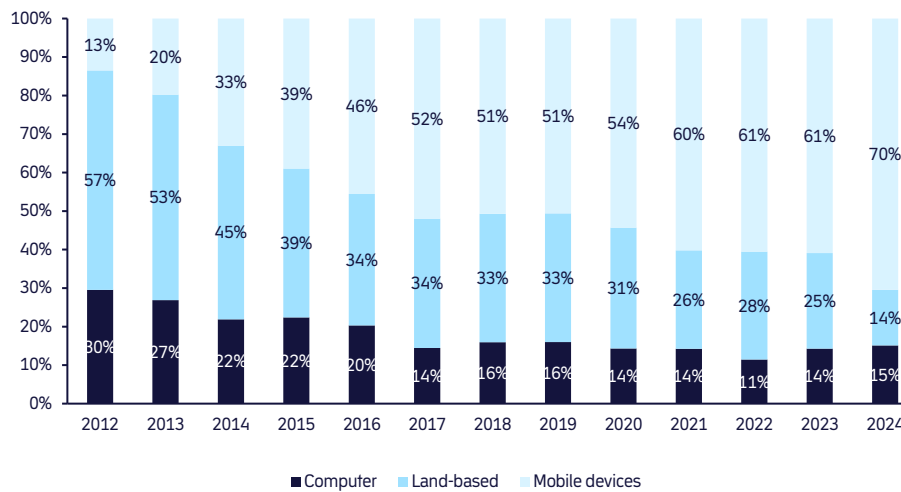
Source: The Danish Gambling Authority's gambling control system

You can place bets both land-based, that is, at a physical location such as a kiosk or a supermarket, or online on your computer or a mobile device like a mobile phone or tablet.

When betting was liberalised, more than half of the GGR came from land-based gambling. Since then, the share has decreased, and in 2024, 14 per cent of the GGR came from land-based gambling. In the same period, the share of GGR from gambling on computers has also

decreased. Conversely, the share of GGR from mobile devices has increased to 70 per cent in 2024 from 13 per cent in 2012, cf. Figure 36.

Figure 36. GGR for betting by sales channels, 2012-2024



Source: The Danish Gambling Authority's gambling control system

2.6 Online casino

In 2024, 40 operators were licensed to offer online casinos. Three of the 40 licences were revenue-restricted, which is a special form of licence valid for one year and where the GGR must not exceed DKK one million. An online casino licence that is not revenue-restricted can be valid for up to five years.

There was great variation in how much the licence holders achieved in the GGR. 18 licence holders had a GGR of less than DKK 25 million, eight licence holders had a GGR between DKK 25 and DKK 100 million, while eleven licence holders had a GGR above DKK 100 million.

13.1%

Increase in GGR for online casino from 2023 to 2024

Table 3. Online casino licenses in 2024 by GGR

GGR (DKK million)	Number of licences
Under 5	10
5 – 10	1
10 – 25	7
25 – 50	4
50 – 100	4
100 – 200	5
200 - 500	5
Over 500	1

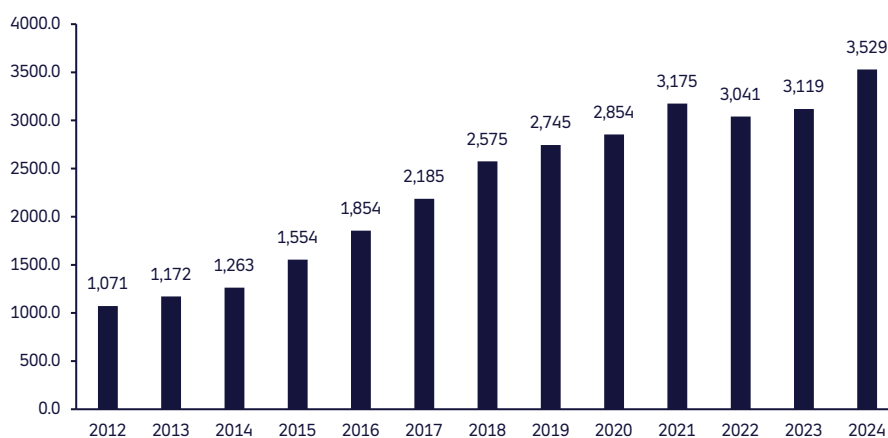
Source: The Danish Gambling Authority.

Note: Revenue-restricted licences are not included.

In 2024, the GGR for online casino amounted to DKK 3,529 million, corresponding to 32 per cent of the total gambling market. This is an increase of DKK 410 million compared to 2023, which corresponds to 13.1 per cent.

Online casino is the gambling category where the GGR has grown the most since 2012 and has therefore helped drive the overall increase in the gambling market during that period. Up until 2021, there was an annual increase in GGR, but this development stopped in 2022, when there was a decrease for the first time, cf. Figure 37. From 2012 to 2024, the GGR has grown 229 per cent.

Figure 37. GGR for online casino, 2012-2024, DKK million

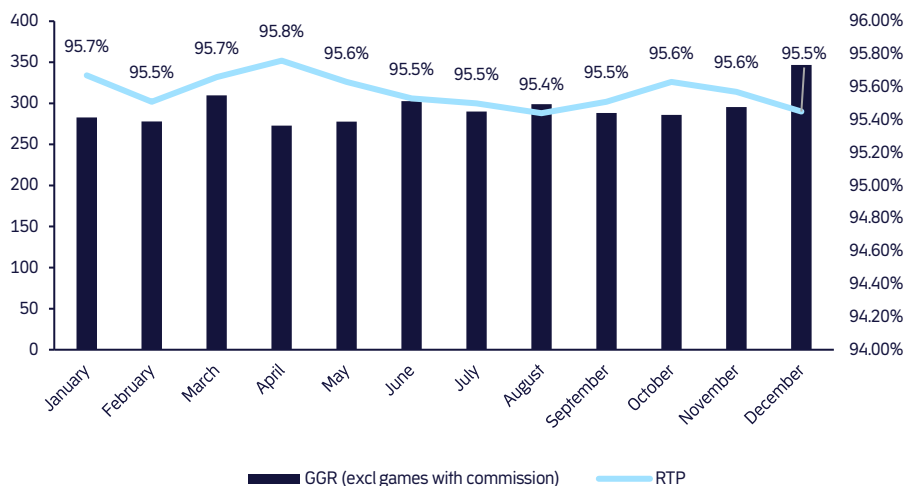


Source: Data on duties reported by licence holders to the Danish Tax Agency

Note: 2024 prices

The average RTP for online casinos in 2024 was 95.57 percent. August was the month in 2024 with the lowest RTP at 95.44 per cent, while it was highest in April at 95.76 per cent. *cf. Figure 38.*

Figure 38. GGR (excl. games with commission), DKK million and RTP for online casino in 2024

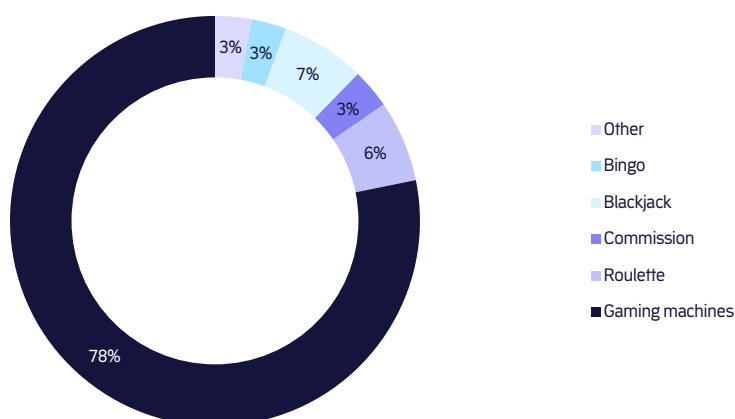


Source: Data on duties reported by licence holders to the Danish Tax Agency

At online casinos, Danes can play several types of games. In 2024, the GGR from online gaming machines amounted to DKK 2,759 million, corresponding to 78 per cent of the online casino market. *cf. Figure 39.* Roulette and blackjack accounted for DKK 226 and 235 million respectively in GGR, corresponding to 6 and 7 per cent of the total GGR for the category.

The GGR for poker amounted to DKK 110 million, corresponding to 3 per cent. Finally, bingo and other game types accounted for DKK 97 million and DKK 101 million, respectively, corresponding to 3 and 3 per cent.

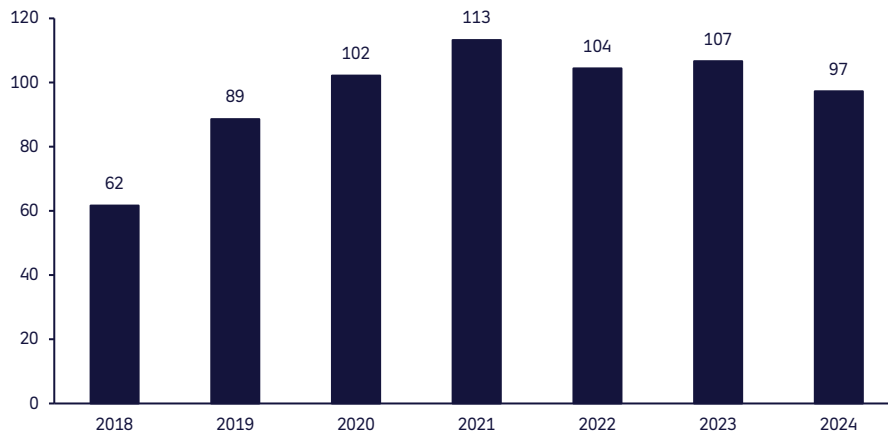
Figure 39. GGR for online casino in 2024 by game types



Source: The Danish Gambling Authority's gambling control system

Online bingo was liberalised in 2018. In 2018, the GGR was DKK 61 million, but then increased like the overall online casino market until 2022, when there was a decrease, *cf. Figure 40.* From 2018 to 2024, bingo's share of the online casino market has increased from 2.4 to 2.8 per cent.

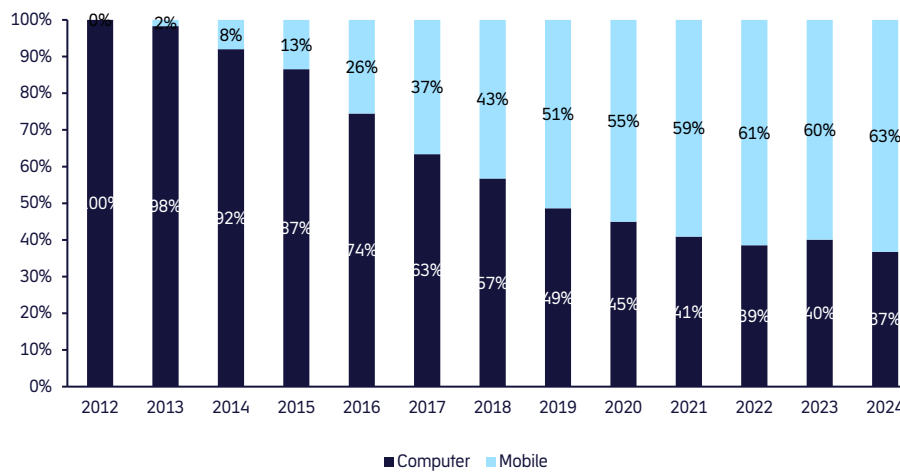
Figure 40. GGR for online bingo 2018-2024, DKK million.



Source: The Danish Gambling Authority's gambling control system
 Note: 2024 prices

Since 2012, there has been an increasing tendency for Danes to gamble on online casinos on mobile devices such as their mobile phone or tablet rather than on the computer. In 2024, the share of GGR for online casino that comes from gambling on mobile devices was 63 percent, cf. Figure 41., which is the highest share ever. In 2012, almost all GGR was generated from gambling on computers.

Figure 41. GGR for online casino by sales channels, 2012-2023



Source: The Danish Gambling Authority's gambling control system

