

The Gambling Market in Numbers 2023

Review by the Danish Gambling Authority on the
development of the gambling market in 2023

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Foreword

At the Danish Gambling Authority, we make it a priority to keep our stakeholders informed about the latest developments in the Danish gambling market. We do this in our monthly statistics in Power BI and in a number of reports and releases. For the fourth time, we are now publishing “The Gambling Market in Numbers”, which collects a wide range of figures and statistics on Danes' gambling spend and behaviour.

The report reviews developments in individual gambling areas in 2023, but it also looks across the areas. There are also statistics for ROFUS (Register of self-excluded players) and the Danish Gambling Authority's helpline StopSpillet. The report therefore includes, among other things, how much Danes spent on gambling on average in 2023, when the players contacting StopSpillet made their gambling debut, and which days of the week Danes bet on sports and other events.

I hope that you will find the “Gambling Market in Numbers 2023” useful.

On behalf of the Danish Gambling Authority,



Anders Dorph
Director



Introduction

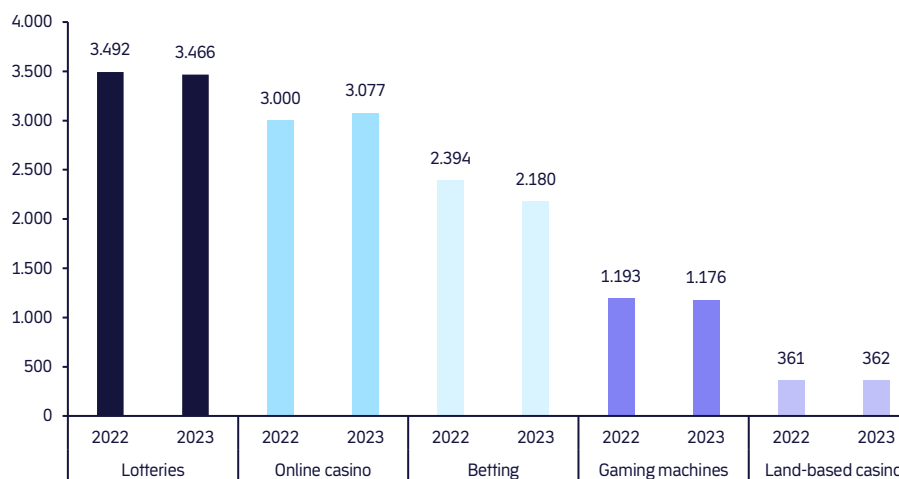
At the Danish Gambling Authority, it is a core task to continuously analyse developments in the gambling market. The “Gambling Market in Numbers 2023” presents the overall statistical overview of developments in the field of gambling. 43 figures and tables show developments both in the individual gambling areas (betting, online casino, gaming machines, land-based casino and lotteries) and across, and follow developments 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.

First year without covid-19 in the gaming market since 2019

In both 2020, 2021 and 2022, Danish society was largely characterised by covid-19. Covid-19 restrictions aimed at preventing the spread of infection meant that restaurants, gambling arcades and casinos were closed for periods of time. It affected the gambling spend in the land-based gambling market. In 2023, there were no Covid-19 restrictions affecting the gambling market.

In total, the total GGR for the Danish gambling market in 2023 amounted to DKK 10.3 billion, a decrease of DKK 179 million compared to 2022, corresponding to 1.7 per cent. Thus, the increase in GGR for online casino and land-based casino was not enough to cover the decrease in GGR for both betting, gaming machines and lotteries.

Figure 1. GGR for the Danish gambling market 2022-2023, DKK million



Source: Data on duties reported by licence holders to the Danish Tax Agency, Danske Spil A/S, Det Danske Klasseslotteri A/S, Varelotteriet, Landbrugslotteriet and financial statements from licences for charity lotteries
Note: 2023 prices

Using the concept of gross gaming revenue (GGR)

In the 'Gambling Market in Numbers 2023', gross gaming revenue (GGR) is consistently used as a measure of the size of the gambling market. GGR is calculated as players' deposits in games minus winnings plus any commission paid by players to participate in a game, *cf. figure 2*. The GGR is thus a measure of how much players lose to the gambling operators. Therefore, GGR is often referred to as the gambling spend. However, it should be noted that the GGR figure is higher than what the players actually lose, since the bonuses that players gamble away also count as deposits.

Figure 2. Calculation of gross gaming revenue (GGR)

What is GGR?

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

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

Data base for the report

"The Gambling Market in Numbers 2023" is based on several different data sources. This involves in particular tax reports from 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 the direct reporting of these licence holders to the Danish Gambling Authority. Data from ROFUS and StopSpillet comes from internal systems within the Danish Gambling Authority. Statistics for the charity lotteries are based on the accounts submitted by the licence holders after the lottery was held. Finally, data on the gambling markets in Europe and the channelisation rate come from the analytical institute H2 Gambling Capital.

The data used in the report may change. The latest updated figures for the gambling market can always be found in the monthly statistics at [Spillemyndigheden.dk](https://spillemyndigheden.dk).

Key figures for the gambling market in 2023

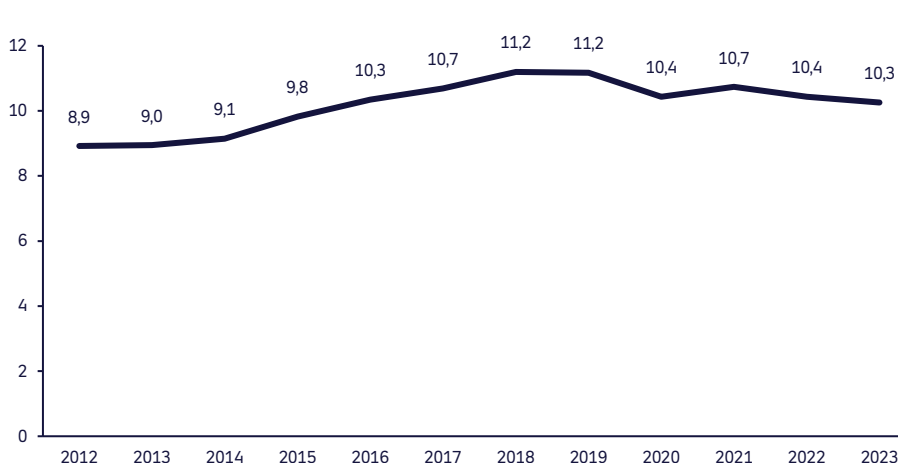
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1.1 Development of the gambling market in 2023

The total gambling market in Denmark amounted to DKK 10.3 billion in GGR in 2023, cf. figure 3. This is a decrease of DKK 179 million compared to 2022, corresponding to 1.7 per cent. Since 2012, the GGR has increased by DKK 1.3 billion, equivalent to 15 per cent. During periods of 2020, 2021 and 2022, the gambling market was affected by Covid-19 restrictions that caused the lockdown of restaurants, gambling arcades and casinos, which negatively affected the GGR. In 2023, there were no Covid-19 restrictions affecting the gambling market.

DKK 10.3 billion

Figure 3. GGR for the total Danish gambling market 2012-2023, DKK billion

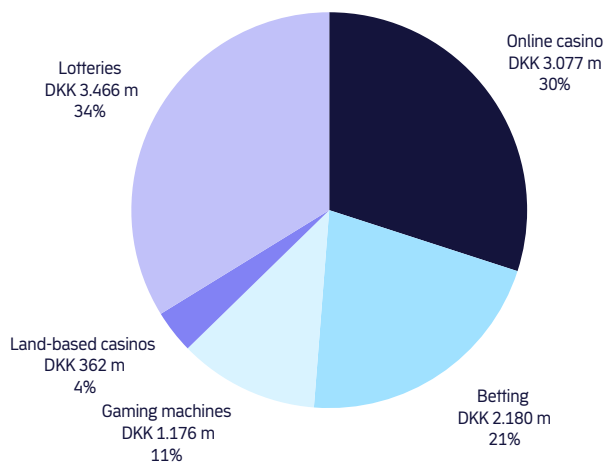


GGR for the gambling market in 2023

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 financial statements from licences for charity lotteries
 Note: 2023 prices

As measured by the GGR, lotteries were the largest gambling area in 2023 with DKK 3,466 million, representing 34 per cent of the gambling market, cf. figure 4. Online casinos and betting together made up just over half of the gambling market, while gaming machines and land-based casinos were the smallest gambling areas, with market shares of 11 per cent and 4 per cent respectively.

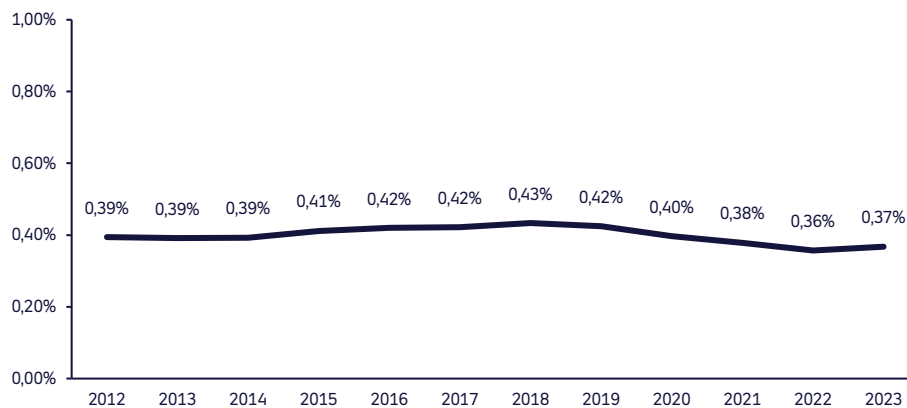
Figure 4. Gambling areas market shares in 2024



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 licences for charity lotteries

Developments in the gambling market must be seen in the context of how the overall Danish economy is developing. In 2023, the total GGR was equivalent to 0.37 per cent of Danish gross domestic product (GDP).

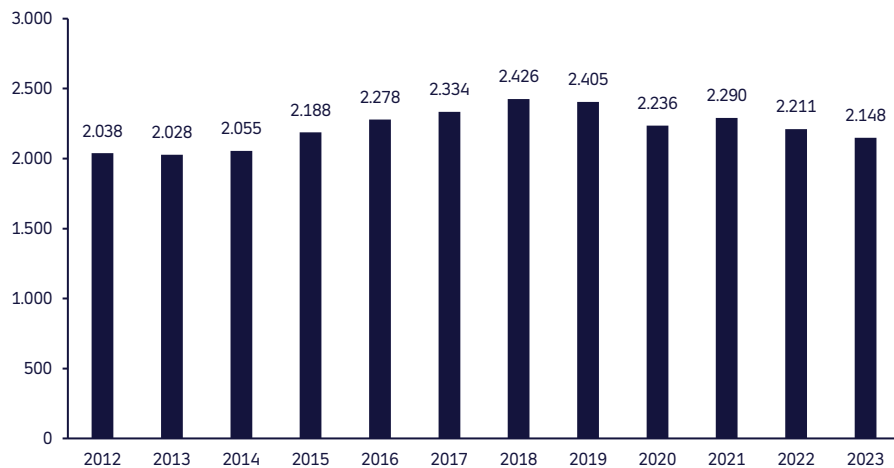
Figure 5. GGR for the total Danish gambling market relative to GDP 2012-2023



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

Developments in the gambling market must also be seen in the context of population growth. In 2023, Danes spent an average of DKK 2,148 on gambling, cf. figure 6. This is DKK 63 less than in 2022, corresponding to a decrease of 2.9 per cent. Compared to 2012, spending per Dane in 2023 has increased by DKK 110, which corresponds to 5.4 per cent.

Figure 6. Average gambling spend per Dane over 18 years 2012-2023



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

Note: Gambling spend is measured as GGR. 2023 prices.

1.2 Licences for gambling in 2023

One of the core tasks of the Danish Gambling Authority is to issue licences to offer games in Denmark. In 2023, there were 965 licences for the provision of gambling on the Danish market during the year, *cf. table 1*.

In Denmark, there is a monopoly on lotteries that do not have a charitable purpose. In 2023, there were four licence to offer these lotteries. Of these, three of the licences were for class lotteries.

1,530 lotteries with a charitable purpose were held there in 2023. The 583 lotteries had received a licence from the Danish Gambling Authority. The remaining 947 lotteries had been notified to the Danish Gambling Authority. Notifications cover charity lotteries with sales of less than DKK 20,000, which do not require a licence from the Danish Gambling Authority.

There were 25 and 39 licences, respectively, to offer betting and online casino. Of these, three of the licences for betting and four of the licences for online casino were revenue-restricted. A revenue-restricted licence is valid for one year and stipulates that the GGR must not exceed DKK 1 million. A licence for offering betting and online casino that is not revenue-restricted can be valid for up to five years.

In 2023, there were 305 licences to install physical gaming machines in restaurants and gambling arcades. In addition, there were nine licences to offer land-based casino.

At Spillemyndigheden.dk you can always see who is currently licensed to offer gambling in Denmark.

965

Licences to offer gambling in Denmark in 2023

Table 1. Licences/notifications to offer gambling in Denmark in 2023

Gambling area	Number of Licences/Notifications
Betting	22
Betting — Revenue-restricted	3
Online casino	35
Online casino - Revenue-restricted	4
Gaming machines	305
Land-Based casinos	9
Monopoly lotteries	4
Charity lotteries — licences	583
Charity lotteries — Notifications	947

Source: The Danish Gambling Authority

1.3 Development in land-based and online gambling

In Denmark you have the opportunity to gamble online and land-based. That is, you can gamble both on the Internet or physically at locations such as an arcade, restaurant, kiosk, etc.

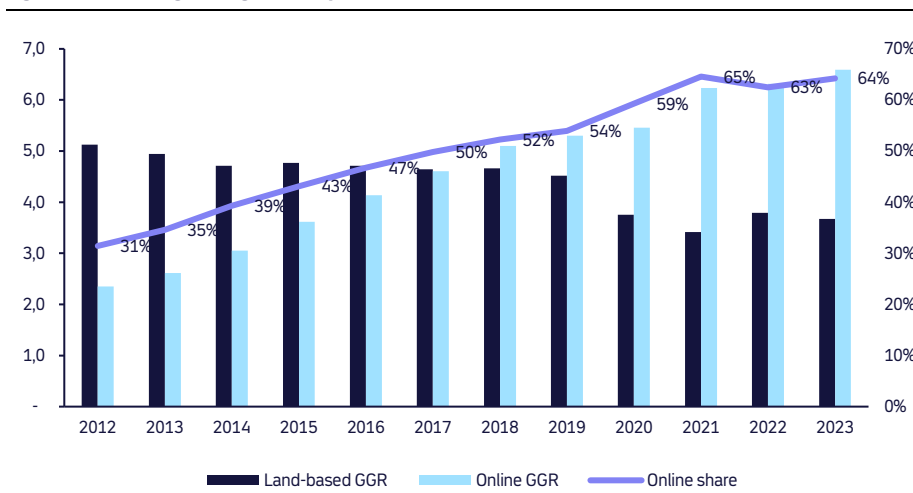
In 2023, 64 per cent of the total GGR came from online gambling, cf. figure 7. That's an increase of 33 percentage points compared with 2012. It should be noted that gambling arcades and land-based casinos were closed in January 2022 due to Covid-19 restrictions, which affected the GGR from land-based gambling. The restrictions also affected the land-based gambling market in 2020 and 2021. In those years, the lockdown lasted for a longer time compared to 2022, which helps explain that the share of online gambling decreases slightly from 2021 to 2022.

Apart from 2022, the share of GGR coming from online gambling has been increasing every year since 2012, with 2023 however not quite up to 2021 levels, largely due to the 2021 lockdowns. The land-based GGR has declined since 2012, while the GGR from online gambling has increased. The increase in GGR, which characterises the development of the Danish gambling market, is therefore driven by the increase in online gambling.

64 per cent

Share of GGR from online gambling in 2023

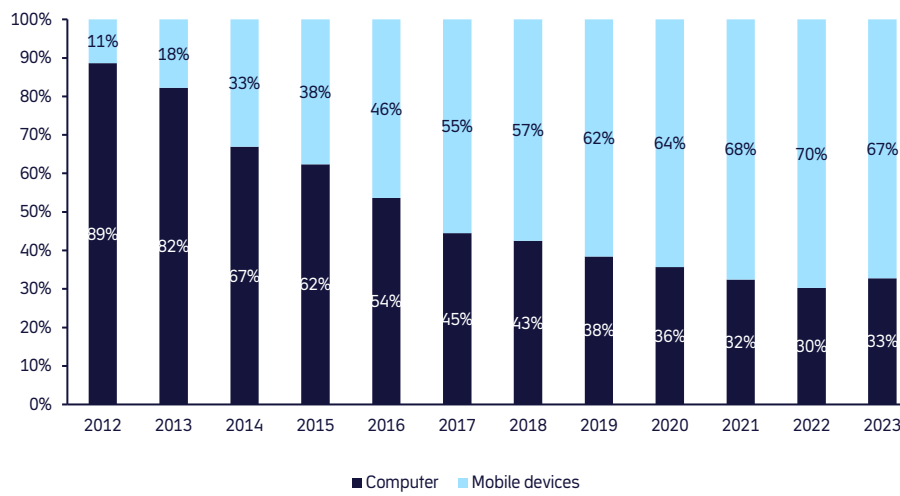
Figure 7. GGR in the gambling market by sales channels, DKK billion 2012-2023



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

Online games can be played both 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 67 per cent. This development must 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 8. GGR for online betting and online casino by sales channels



Source: The Danish Gambling Authority's gambling control system

1.4 Danish gambling spend compared to Europe

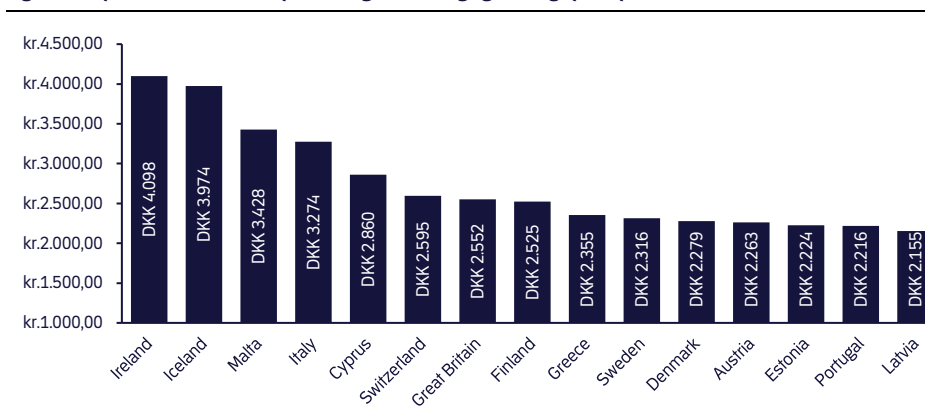
European countries differ among themselves both in terms of the framework and requirements of legislation applying to the offering of gambling, but also in relation to how much money each citizen spends on gambling on average.

In 2023, the average spending on gambling per adult citizen in Denmark was the 11th highest in Europe, cf. figure 9. At the same time, it was the second lowest spending on gambling per adult citizen in the Nordic region, as both Iceland, Finland and Sweden ranked higher. These figures also include the spending on online gambling sites that are not licensed in the countries in question. Ireland, with DKK 4,098, had the highest per capita gambling spend in 2023.

No.11

Denmark had the 11th highest per capita gambling spend in Europe in 2023

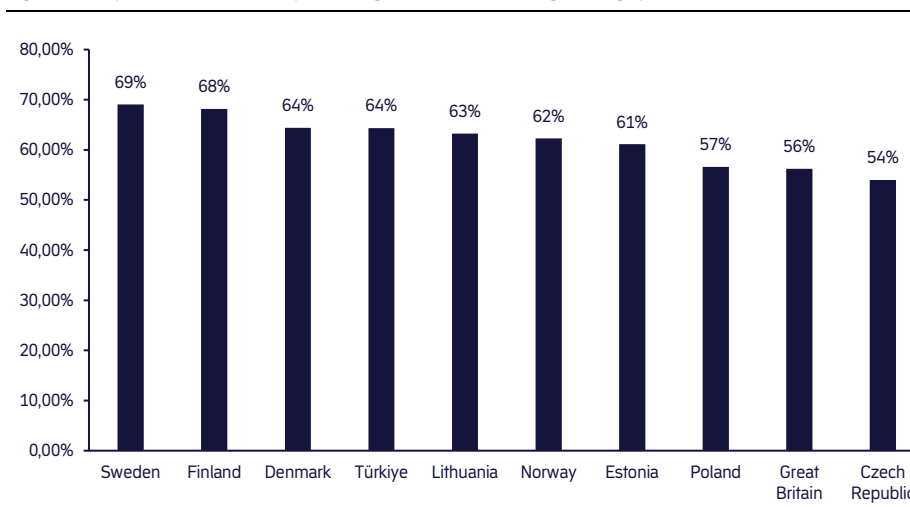
Figure 9. Top 15 countries in Europe with highest average gambling spend per adult in 2023



Source: H2 Gambling Capital. The data base may change, which is why the figures may be updated later. The numbers are drawn on 14 March 2024. Note: Gambling spend is measured as GGR. Figures include both the regulated markets and unregulated online markets

There is also a big difference between countries on 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 3rd largest share of gambling spend generated online in Europe in 2023, cf. figure 10. Sweden had the highest share of gambling spend of 69 per cent generated online. The large share of online gambling must be seen in the context of the fact that Denmark generally has a high degree of digitisation from an international perspective.

Figure 10. Top 10 countries in Europe with highest share of online gambling spend, 2023



Source: H2 Gambling Capital. The data base may change, which is why the figures may be updated later. The numbers are drawn on 14 March 2024. Note: Gambling spend is measured as GGR. The figures include both the regulated markets and unregulated online markets.

1.5 Development in channelisation rate

The Danish Gambling Authority continuously monitors the development of the channelisation rate in Denmark. The channelisation rate refers to the proportion 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.

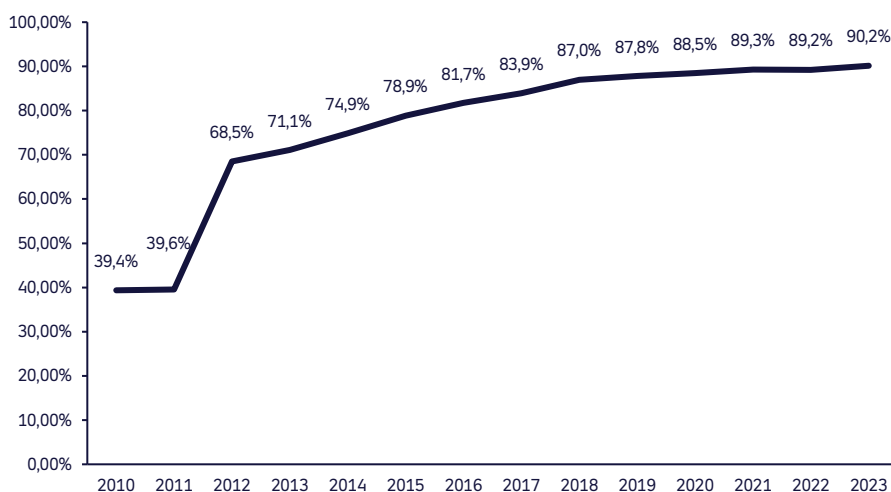
90.2%

Share of Online Gambling in Denmark by Licensed Sites in 2023

Prior to the liberalisation of betting and online casino on 1 January 2012, the channelisation rate was at just under 40 per cent, and one of the aims of the liberalisation was therefore to shift part of the spending on gambling to sites with a Danish licence to offer gambling. By the end of 2012, the channelisation rate had increased to just under 69 per cent and in 2023 it was 90 per cent, a slight increase compared to 2022, when the channelisation rate was 89 per cent, *cf. figure 11*. In over 10 years, the channelisation rate has increased 22 percentage points.

Thus, the vast majority of Danes' online gambling today takes place on websites that must comply with the Danish Gambling Act and which the Danish Gambling Authority supervises.

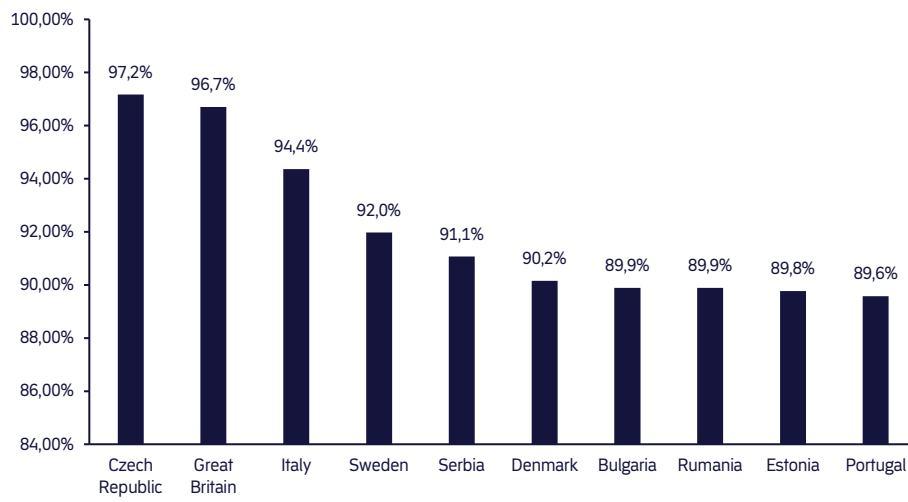
Figure 11. Online channelisation rate in Denmark, 2010-2023



Source: H2 Gambling Capital. The data base may change, which is why the figures may be updated later. The numbers are drawn on 14 March 2024.

As in previous years, the channelisation rate in Denmark in 2023 was among the highest in Europe. To be precise, Denmark had the 6th highest channelisation rate in Europe, *cf. figure 12*. The Czech Republic had the highest channelisation rate at 97 per cent.

Figure 12. Top 10 European countries with highest online channelisation rate in 2023



Source: H2 Gambling Capital. The data base may change, which is why the figures may be updated later. The numbers are drawn on 14 March 2024.

1.6 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 physical stores as well as gambling at land-based casinos either temporarily for 24 hours, one, three or six months or permanently. A permanent exclusion means that you can get off the register again at the earliest after one year.

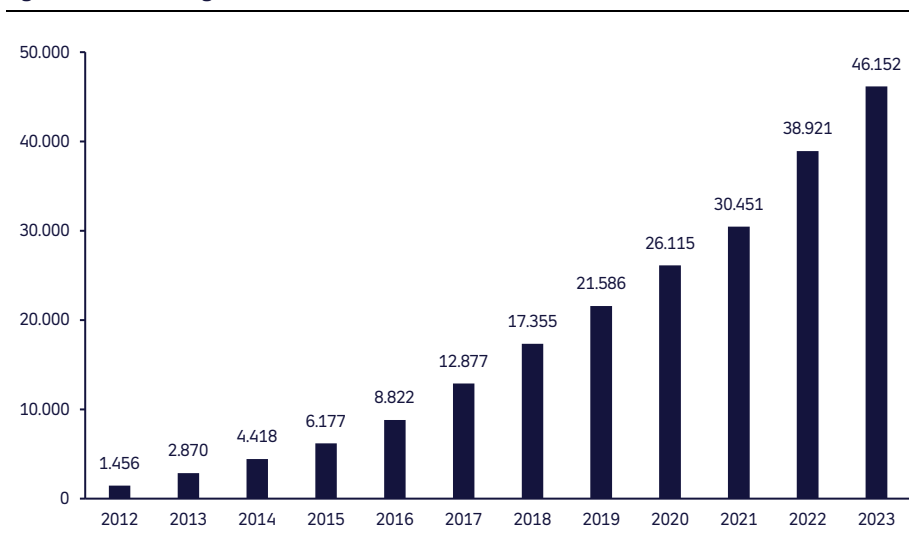
It is required by law for gambling operators licensed by the Danish Gambling Authority to refer to ROFUS in their marketing. This helps ensure that Danish players are aware of the option to exclude themselves from gambling.

At the end of 2023, 46,152 Danes were registered with ROFUS, *cf. figure 13*. This is an increase of over 7,000 Danes compared to the end of 2022, when 38,921 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.

46,152

Number of registered persons in ROFUS at the end of 2023

Figure 13. Individuals registered with ROFUS 2012-2023



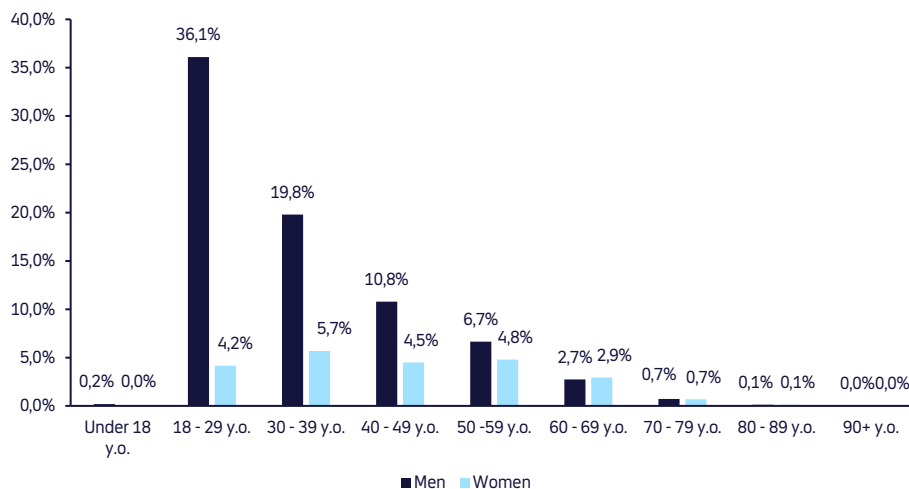
Source: The Danish Gambling Authority

Note: The dataset includes both players who are temporarily and permanently excluded. For 2012-2019 as well as 2023, the figures are drawn on the 1st of January of the following year, for 2020 and 2021 on 31 December and for 2022 on 5 January 2023. The figure therefore only indicates how many individuals were registered on the day when the numbers were drawn. The 24-hour temporary exclusion category is included only for 2023, as these figures are not available for the other years.

It has been the trend since the establishment of ROFUS that most of those registered are men. At the start of 2024, 35,600 of the registered persons were men, corresponding to 77 per cent, *cf. figure 14*. At the same time, there is also a tendency for young people to exclude themselves from gambling, as 66 per cent of those registered were under the age of 40. 36 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 place bets in land-based stores or land-based casinos, there were 88 individuals in that age group registered with ROFUS as of 1 January 2024, representing 0.2 per cent of all registered. For example, this may be for the purpose of avoiding gambling when they reach the age of 18.

Figure 14. Individuals registered with ROFUS by sex and age, 1 January 2024

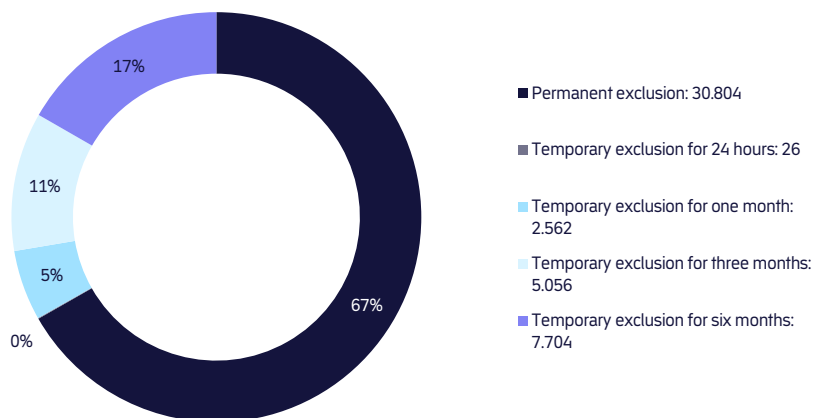


Source: The Danish Gambling Authority

The majority of individuals registered with ROFUS have excluded themselves permanently, a trend that has always characterised ROFUS and which at the start of 2024 applied to 30,804 registered persons, corresponding to 67 per cent, cf. figure 15.

Of the temporary exclusion types, 7,704 had chosen six months, corresponding to 17 per cent, 5,056 registered had chosen 3 months exclusion, corresponding to 11 per cent, while 2,562 people, corresponding to 5 per cent, had excluded for a single month. 26 individuals were excluded for 24 hours.

Figure 15. Individuals registered with ROFUS by exclusion type, 1 January 2024



Source: The Danish Gambling Authority

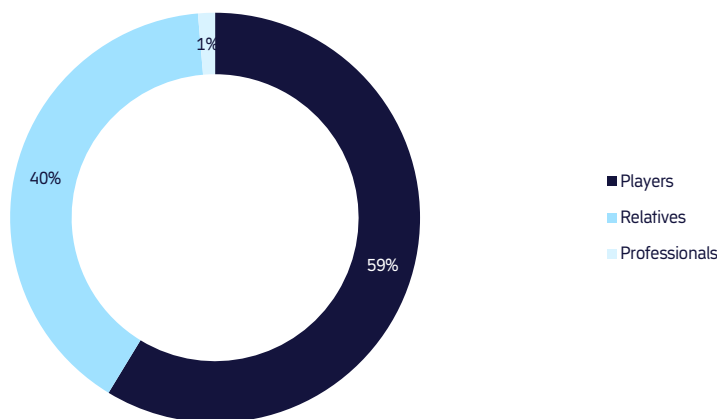
1.7 StopSpillet — Gambling Addiction Helpline

The Danish Gambling Authority operates StopSpillet, a helpline where players, relatives and professionals can call or text via chat for advice and guidance on gambling addiction and responsible gambling. In 2023, StopSpillet received a total of 523 inquiries. That is a slight decrease compared to 2022, when StopSpillet received 560 inquiries. The majority of requests to StopSpillet are from players, which was the case for 59 per cent of the inquiries in 2023, *cf. figure 16*. 40 per cent of the inquiries came from relatives, while 1 per cent came from professionals.

523

Inquiries to StopSpillet in 2023 from players, relatives and professionals

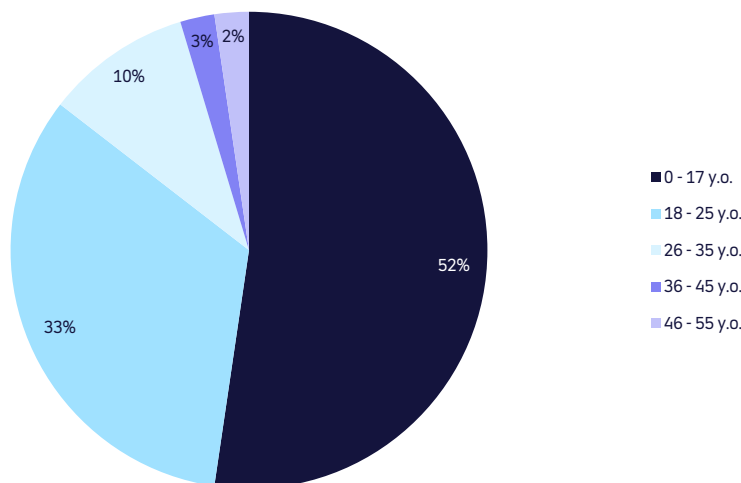
Figure 16. Breakdown of StopSpillet inquiries in 2023



Source: The Danish Gambling Authority

Most players who turn to StopSpillet have started gambling at an early age, *cf. figure 17*. To be precise, 52 per cent of players who applied in 2023 had started gambling before the age of 18, which is the age limit for gambling in Denmark.

Figure 17. Gambling debut age of players by age group, 2023-inquiries



Source: The Danish Gambling Authority

When players turn to StopSpillet they can get help to clarify if they have a problematic relationship with gambling. This is done, among other things, by talking to StopSpillet's advisers about their relationship with gambling and by using a gambling addiction test. The test gives a

score from 0 to 9. If you score 4 or more, it indicates that you have a gambling addiction. In 2023, the average score of the players who contacted StopSpillet was 5.89, cf. figure 18. The figure therefore indicates that the players who contact the helpline, on average, in fact have a problematic relationship with gambling.

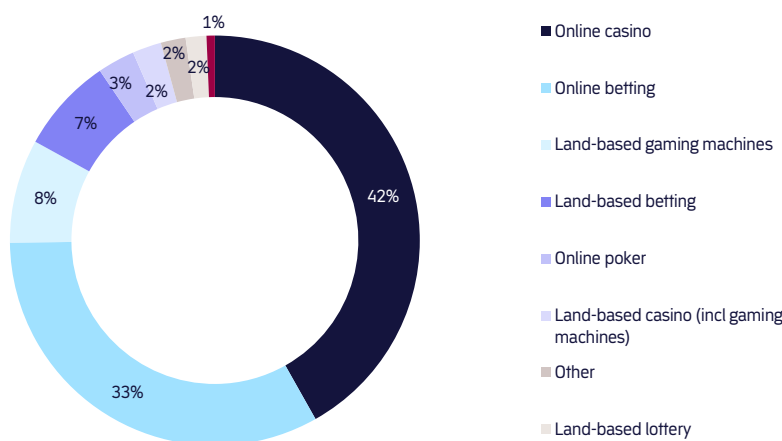
Figure 18. Average of players' scores on the gambling addiction test, 2023 inquiries



Source: The Danish Gambling Authority

When players turn to StopSpillet, the advisers ask what types of games players are using. Most people who contact StopSpillet list online gambling as their preferred game type. Thus, in the inquiries to StopSpillet in 2023, online casino and online betting accounted for a total of 75 per cent of the listed game types. Land-based gaming machines and land-based betting accounted for 8 per cent and 7 per cent of the listed game types, respectively. Finally, StopSpillet also had conversations with players who played online poker, land-based casino, land-based lottery, games related to gaming and more.

Figure 19. Players' favourite game types, 2023 inquiries



Source: The Danish Gambling Authority

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

Development of the gambling areas in 2023

2

2.1 Charity lotteries

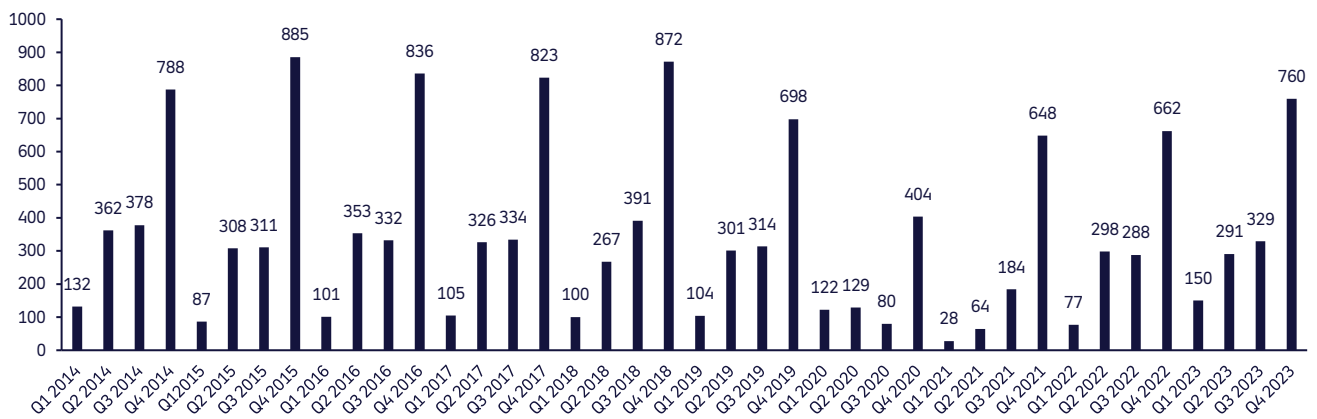
In Denmark, there is a monopoly on the provision of lotteries, with the exception of lotteries that have a charitable purpose. In 2023, 1,530 lotteries with a charitable purpose were held. 947 of the lotteries had been notified to the Danish Gambling Authority. These are lotteries with a sales amount of DKK 20,000 or less, and therefore do not need a licence from the Danish Gambling Authority. The remaining 583 lotteries had been licensed by the Danish Gambling Authority.

1,530

Charity lotteries held in 2023

The 1,530 charity lotteries in 2023 is an increase compared to 2022, when 1,325 were held. 760 of the charity lotteries in 2023 were held in the fourth quarter, representing 50 per cent, cf. figure 20. Many of the lotteries are held at the end of the year, a trend that has also prevailed in previous years. This is because many associations want to hold lotteries in connection with Christmas.

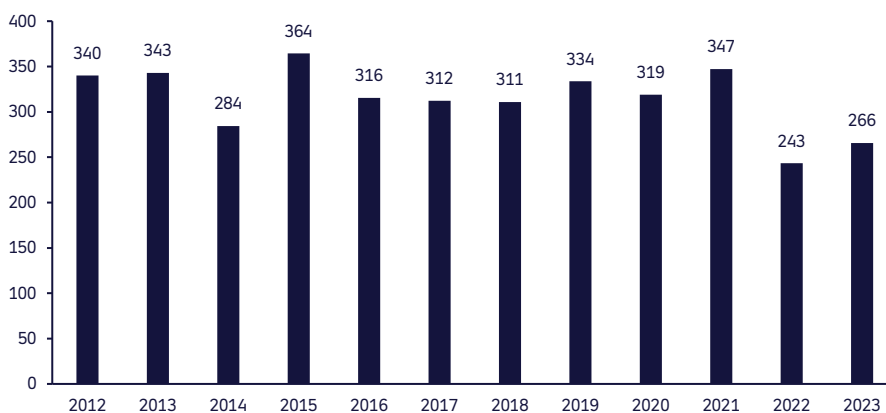
Figure 20. Charity lotteries held in 2023 (includes both notifications and licences)



Source: The Danish Gambling Authority

In 2023, the GGR for the charity lotteries amounted to DKK 266 million. This is an increase of DKK 22 million compared to 2022, which corresponds to 9 per cent, cf. figure 21.

Figure 21. GGR for charity lotteries, DKK million, 2012-2023

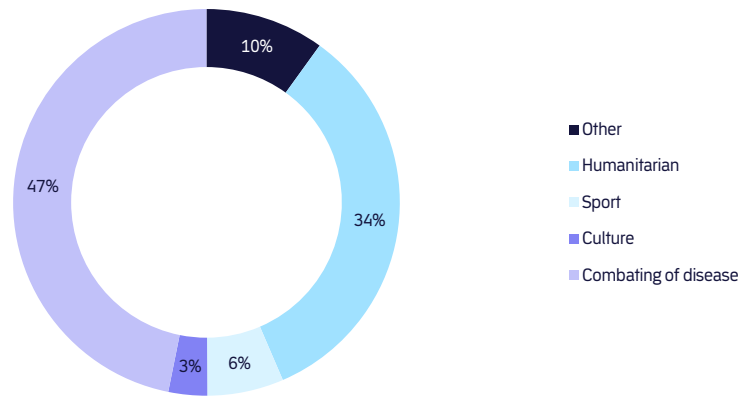


Source: Accounts from licences for charity lotteries

Note: 2023 prices. The 2023 GGR is a preliminary estimate. Only GGR from licences for charity lotteries is included.

Charity lotteries are held for many different purposes. In 2023, lotteries whose profits go to the combating of disease accounted for about 47 per cent of the GGR for the area, while lotteries for humanitarian purposes accounted for 34 per cent, *cf. figure 22*. The smallest charity lotteries, measured by their GGR, are those held for the benefit of sporting and cultural purposes. They represented 6 per cent and 3 per cent, respectively, of the total GGR for charity lotteries in 2023.

Figure 22. GGR for charity lotteries in 2023 by purpose



Source: Accounts from licences for charity lotteries

Note: The 2023 GGR 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 without a charitable purpose. This means that it is only Danske Lotteri Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet and Landbrugslotteriet, which may offer lottery and class lottery.

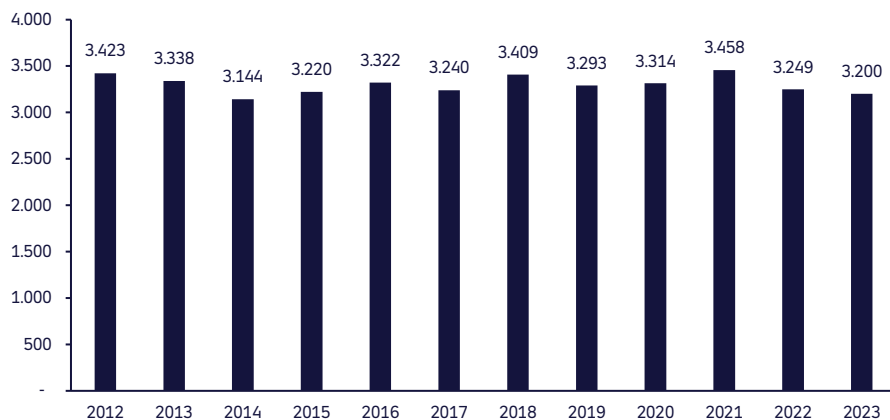
In 2023, the total GGR for the monopoly lotteries amounted to DKK 3,200 million. This is a decrease of DKK 49 million compared to 2022, corresponding to 1.5 per cent. Thus, charity lotteries and monopoly lotteries made up a total of 34 per cent of the total Danish gambling market in 2023.

Monopoly lotteries have been characterised by a steady development of the GGR since the partial liberalisation of the gambling market in 2012, cf. figure 23. During the period, the GGR has fluctuated between DKK 3,144 million in 2014 to DKK 3,458 million in 2021.

-1.5%

Development in GGR for monopoly lotteries from 2012 to 2023

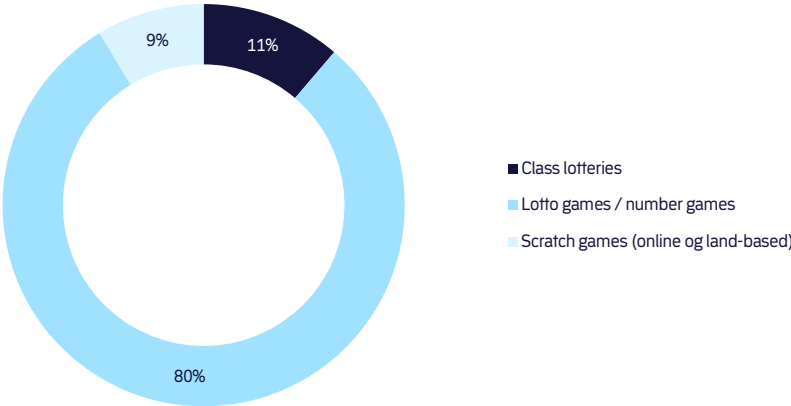
Figure 23. GGR for monopoly lotteries 2012-2023, DKK million



Source: Danske Spil A/S, Det Danske Klasselotteri A/S, Varelotteriet and Landbrugslotteriet
 Note: 2023 prices

As in previous years, the GGR for lottery/number games also represented the vast majority of the total GGR for the area in 2023, cf. figure 24. Precisely, the GGR for these types of games, which include Lotto, Vikinglotto, Joker, Eurojackpot, Alt eller Intet and Keno, amounted to DKK 2,563 million, representing 80 per cent of the total GGR for the monopoly lotteries. The total GGR of the three class lotteries amounted to DKK 360 million, corresponding to 11 per cent, while the scratch games (both online and land-based) amounted to DKK 277 million, corresponding to 9 per cent.

Figure 24. Share of GGR for monopoly lotteries by game type, 2023



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

2.3 Land-based casinos

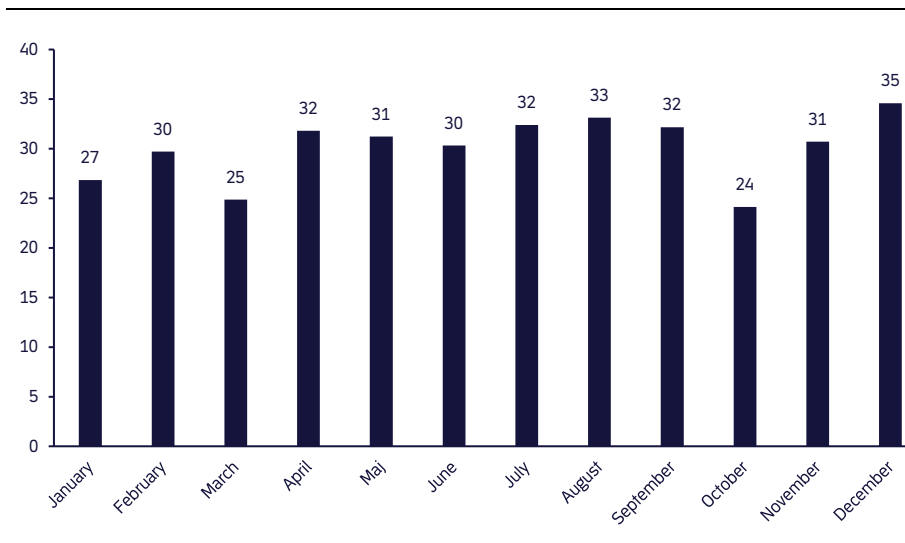
In 2023, the GGR for land-based casinos amounted to DKK 362 million, an increase of DKK one million compared to 2022, corresponding to 0.3 per cent. The land-based casinos thus made up 4 per cent of the total Danish gambling market in 2023 and were the smallest gambling area measured by the GGR.

0.3%

Developments in GGR for land-based casinos from 2022 to 2023

The land-based casino market in 2023 was not marked by lockdowns due to Covid-19 restrictions, which was otherwise the case in 2020-2022. In 2022, the casinos were closed in January, which is why it is no surprise that the total GGR increased from 2022 to 2023. During 2023, the monthly GGR ranged between DKK 24 million in October to DKK 35 million in December, cf. figure 25.

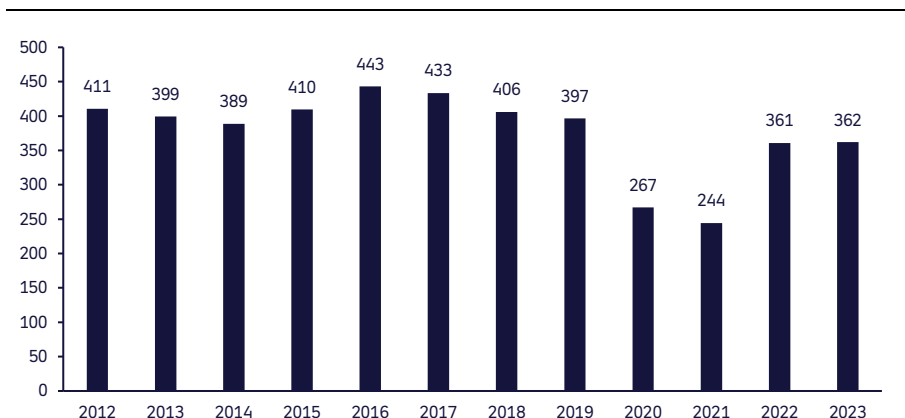
Figure 25. GGR for land-based casinos in 2023, DKK million



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

Between 2012 and 2019, the annual GGR for land-based casinos ranged between DKK 389 and DKK 443 million. Thus, the GGR in 2023 did not reach the same level as in the period before Covid-19 lockdowns in 2020-2022. From 2012 to 2023, the GGR for land-based casinos has decreased by 12 per cent.

Figure 26. GGR for land-based casinos 2012-2023, DKK million



Source: Tax data reported by licence holders to the Danish Tax Agency
 Note: 2023 prices

2.4 Gaming machines

In 2023, the GGR for gaming machines amounted to DKK 1,176 million, a decrease of DKK 17 million compared to 2022, corresponding to 1.5 per cent. This means that gaming machines accounted for 11 per cent of the total Danish gambling market in 2023.

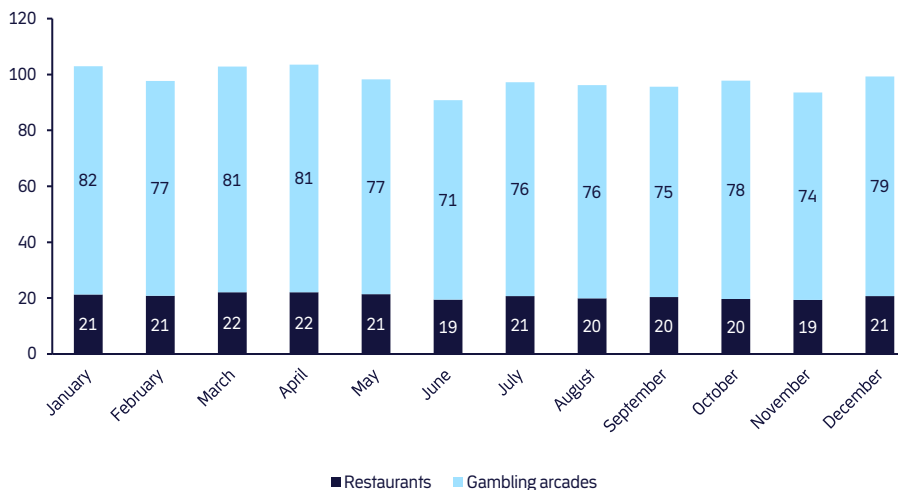
-1.5%

The gaming machine market has for several years been marked by lockdowns of gambling arcades and restaurants, due to Covid-19 restrictions. 2023 was not affected by these restrictions, but the market nevertheless experienced a decline in the GGR, even though the gambling arcades were closed in January 2022. Therefore, the GGR in January 2023 was significantly larger compared to the same month in 2022, but in all other months of 2023 the GGR was smaller than the corresponding months of the previous year. Overall, it resulted in a decrease in the GGR in 2023 compared to 2022.

Development in GGR for gaming machines from 2022 to 2023

Most of the GGR comes from gaming machines set up in gambling arcades, cf. figure 27. In 2023, the GGR for these machines accounted for exactly 79 per cent of the market, while gaming machines set up in restaurants accounted for 21 per cent. As of 31 December 2023, the machines were distributed in 1,153 restaurants and 871 gambling arcades.

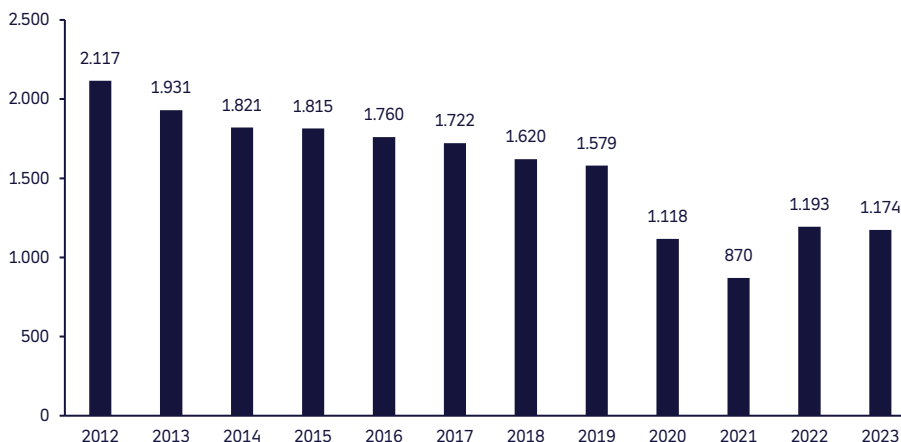
Figure 27. GGR for gaming machines in 2023 divided into restaurants and gambling arcades, DKK million



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

The market for gaming machines has been marked by a decline in the GGR since 2012, when the gambling market in Denmark was partially liberalised, cf. figure 28. The decline was amplified in 2020-2022 as a result of the Covid-19 restrictions. From 2012 to 2023, the GGR has fallen 44 per cent.

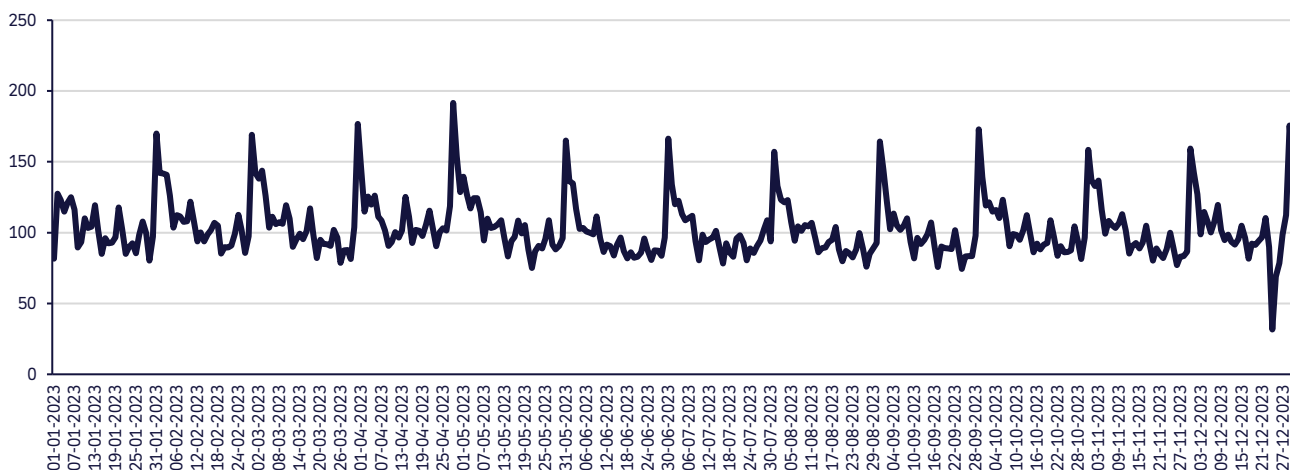
Figure 28. GGR for gaming machines 2012-2023, DKK million



Source: Tax data reported by licence holders to the Danish Tax Agency
 Note: 2023 prices

Activity on the gaming machines in 2023 was greatest on paydays. Danes gambled the most on the machines on the last weekday of the month, when most Danes have a payday, cf. figure 29. Friday 28 April was the day in 2023 when Danes put the most money into gaming machines, while Sunday 24 December was the day when the least money came into the gaming machines.

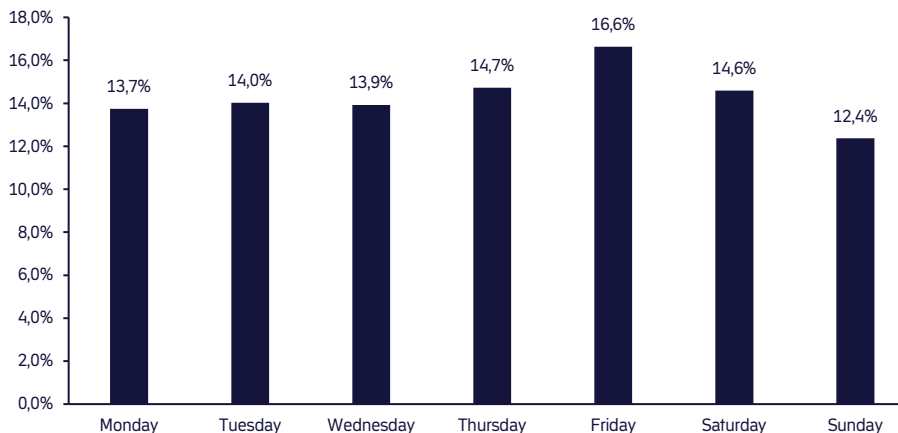
Figure 29. Indexed daily trend in DKK entering gaming machines in 2023



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

Danes gamble the most on gaming machines on Fridays. To be precise, the gambling activity on Fridays accounted for just under 17 per cent of the total amount put into gaming machines in 2023, cf. figure 30. Sundays were by just over 12 per cent the day of the week in 2023 when the gambling activity was the least.

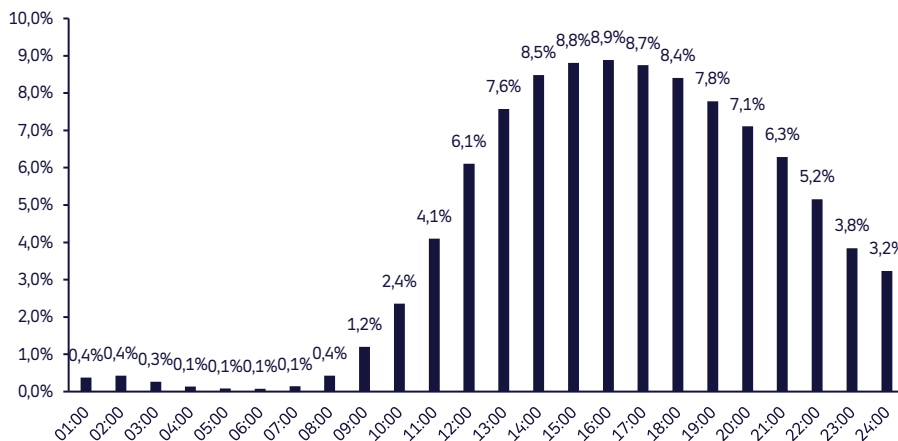
Figure 30. DKK entered into gaming machines by day of the week, 2023



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

It is possible to gamble on gaming machines in restaurants around the clock. However, it is not possible to gamble on gaming machines set up in gambling arcades between 24 and 7 am, as the gambling arcades must remain closed during this time. Gambling activity in the first seven hours of the day therefore also represented just over one per cent of the total activity in 2023. Instead, Danes gamble mostly in the afternoon and in the early evening, cf. figure 31. Thus, the amount put into the gaming machines between 12pm and 8pm accounted for 66 per cent of the total amount that came into the gaming machines in 2023.

Figure 31. DKK entered into gaming machines by hours of the day, 2023



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

2.5 Betting

In 2023, 25 operators were licensed to offer betting in Denmark. Three of the 25 licences were revenue-restricted, which is a special form of licence valid for one year, and where the GGR must not exceed DKK 1 million. A non-revenue-restricted betting licence can be valid for up to five years.

There was wide variation in how much licence holders achieved in the GGR. Eleven 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 above DKK 100 million.

-8.9%

Development in GGR for betting from 2022 to 2023

Table 2. Licences for betting in 2023 by GGR

GGR (DKK million)	Number of licences
Under 5	5
5 – 10	4
10 – 25	2
25 – 50	2
50 – 100	4
100 – 200	2
200 - 500	2
Over 500	1

Source: The Danish Gambling Authority.

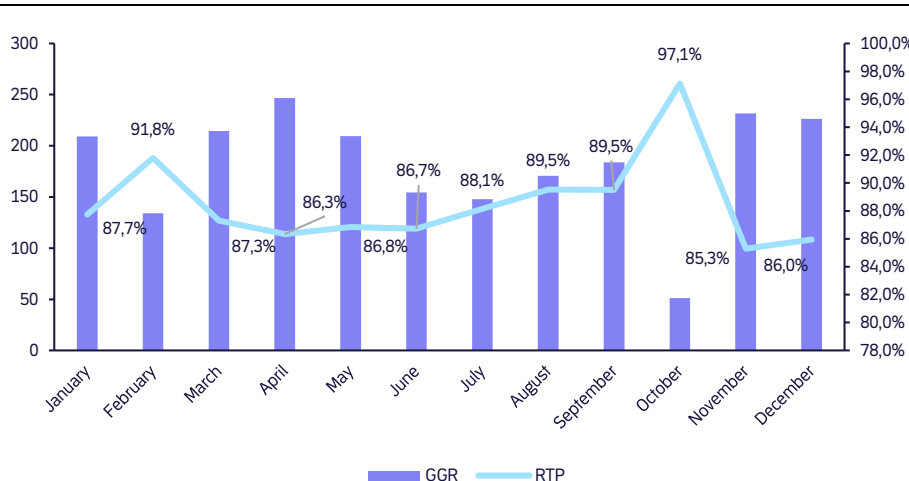
Note: Revenue-restricted licences are not included.

In 2023, the GGR for betting amounted to DKK 2,180 million. This is a decrease of DKK 213 million compared to 2022, corresponding to 8.9 per cent. Thus, betting accounted for 21 per cent of the total Danish gambling market in 2023.

The RTP (Return To Player) affects the size of the gambling operators' GGR. The RTP is an expression of how much the players win on average when they gamble. An average RTP of 90 per cent means, for example, that the player receives an average of 90 DKK when DKK 100 has been spent on a bet.

In 2023, the average RTP was 88.6 per cent. It varied over the year between 85.3 per cent in November and 97.1 per cent in October. The RTP in October is the highest monthly RTP for betting there has been in the years since betting has been liberalised. October therefore also became the month in 2023 with the smallest GGR.

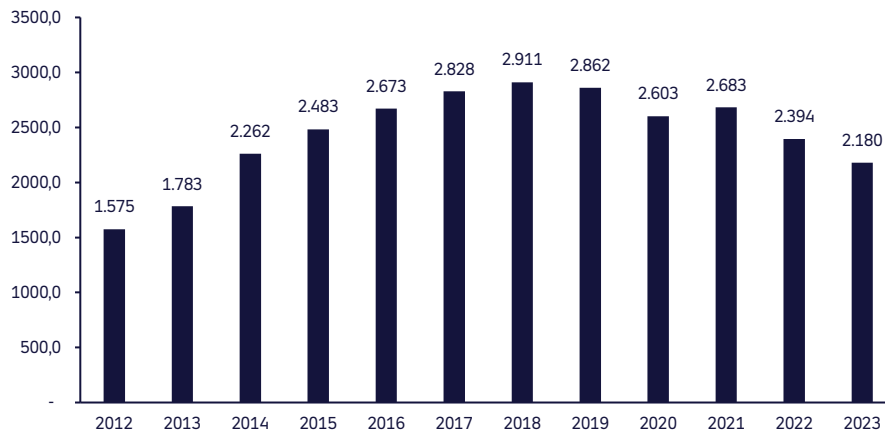
Figure 32. GGR, DKK million and RTP for betting in 2023



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

The betting market, following the liberalisation of the area in 2012, saw an annual increase in the GGR until 2018, after which it has decreased. Compared to 2012, however, the GGR is up 38 per cent in 2023.

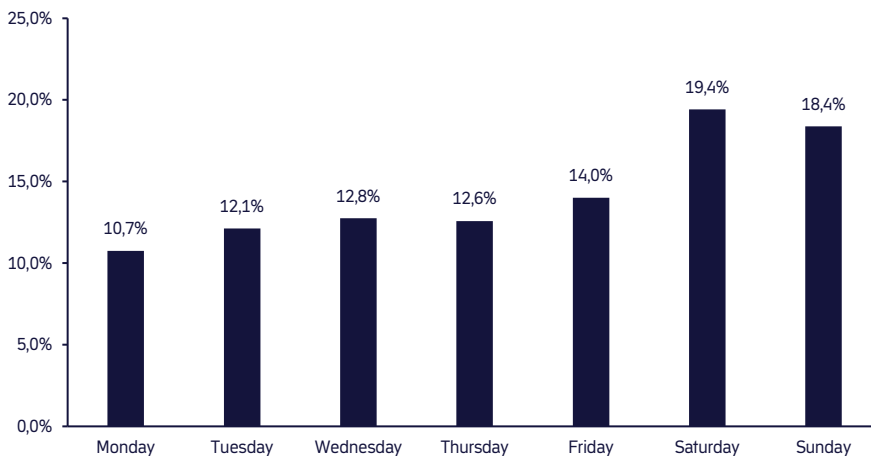
Figure 33. GGR for betting 2012-2023, million DKK



Source: Tax data reported by licence holders to the Danish Tax Agency
 Note: 2023 prices

It is possible to bet on football matches and other sports every day of the year. However, bets are mostly made on weekends. Thus, in 2023, 38 per cent of the deposit on betting was placed on Saturdays and Sundays. It has to be seen in the context of the fact that many matches in European football take place on these days of the week.

Figure 34. Deposits on betting distributed by days of the week, 2023



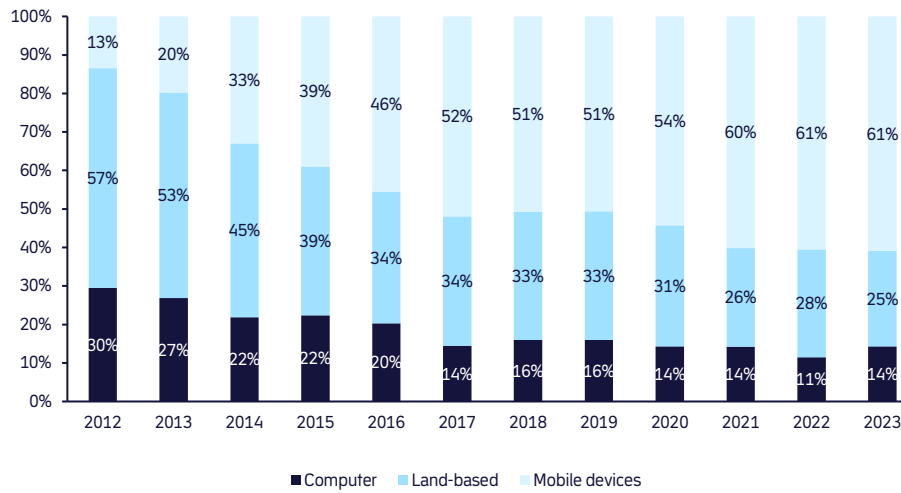
Source: The Danish Gambling Authority's gambling control system

One can place bets both land-based, that is, on a physical location such as a kiosk or a super-market, or online on the 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 declined, and by 2023 25 per cent of the GGR came from land-based gambling. Over the same period, the share of GGR from gambling on computers has

also decreased. Conversely, the share of GGR from mobile devices has risen to 61 per cent in 2023 from 13 per cent in 2012.

Figure 35. GGR for betting by sales channels, 2012-2023



Source: The Danish Gambling Authority's gambling control system

2.6 Online casino

In 2023, 39 operators were licensed to offer online casino. Four of the 39 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 wide variation in how much the licence holders achieved in the GGR. 17 licence holders had a GGR below DKK 25 million, 10 licence holders had a GGR between 25 and DKK 100 million, while eight licence holders had a GGR above DKK 100 million.

2.6%

Development in GGR for online casino from 2022 to 2023

Table 3. Online Casino Licences in 2023 by GGR

GGR (DKK million)	Number of licences
Under 5	9
5 – 10	1
10 – 25	7
25 – 50	4
50 – 100	6
100 – 200	4
200 - 500	3
Over 500	1

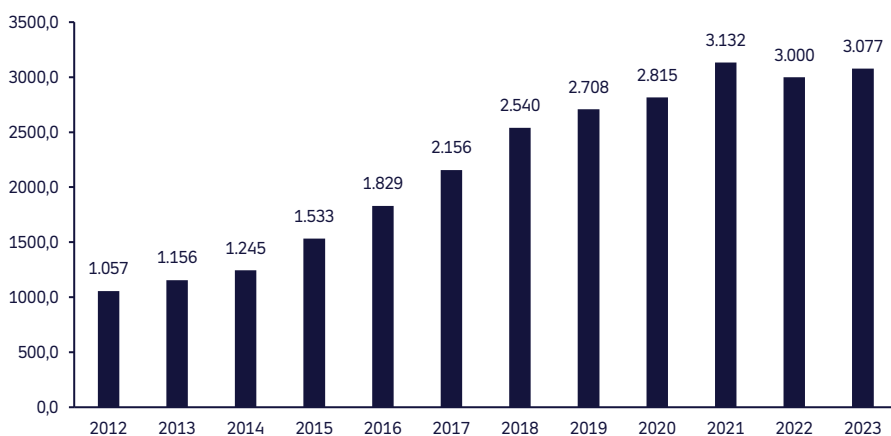
Source: The Danish Gambling Authority.

Note: Revenue-restricted licences are not included.

In 2023, the GGR for online casinos amounted to DKK 3,077 million, or 30 per cent of the total gambling market. This is an increase of DKK 77 million compared to 2022, which corresponds to 2.6 per cent.

Online casino is the gambling area where the GGR has grown the most since 2012 and has therefore helped drive the overall growth of the gambling market during that period. Until 2021, there was an annual increase in the GGR, but this development stopped in 2022, when there was a decrease for the first time, cf. figure 36. From 2012 to 2023, the GGR has grown 191 per cent.

Figure 36. GGR for online casino, 2012-2023, DKK million

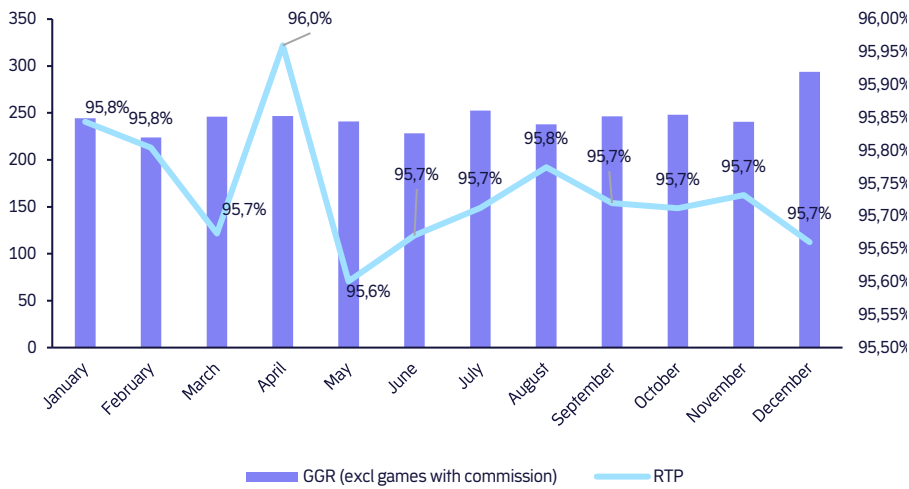


Source: Tax data reported by licence holders to the Danish Tax Agency

Note: 2023 prices

The average online casino RTP in 2023 was 95.74 per cent, which is slightly more compared to 2022 when it was 95.78 per cent. May was at 95.60 per cent the month in 2023 with the lowest RTP, while it was highest in April with 95.96 per cent. *cf. figure 37.*

Figure 37. GGR (excluding games with commission), DKK million and RTP for online casino in 2023



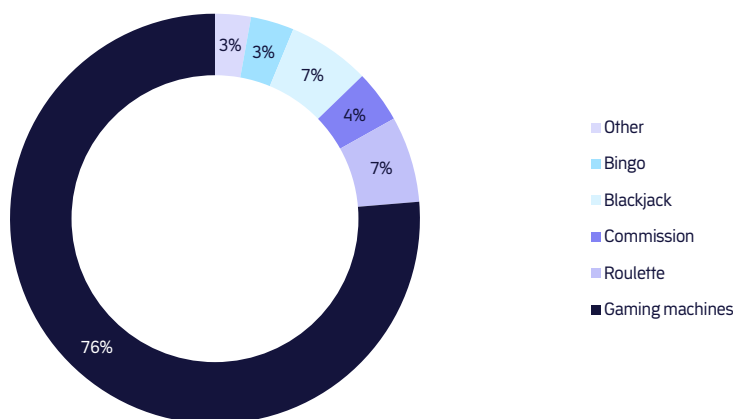
Source: Tax data reported by licence holders to the Danish Tax Agency

At online casinos, Danes can play several types of games. In 2023, the GGR from online gaming machines amounted to DKK 2,348 million, corresponding to 76 per cent of the online casino market, *cf. figure 38.* Roulette and blackjack accounted for DKK 209 and 200 million in GGR, respectively, representing 7 per cent and 7 per cent of the total GGR for the area.

The GGR for commission games amounted to DKK 127 million, corresponding to 4 per cent. Commission games are games in which one plays against other players and pays the gambling operator a commission to participate. This includes, for example, multiplayer poker.

Finally, bingo and other types of games amounted to DKK 105 and 87 million, respectively, corresponding to 3 and 3 per cent.

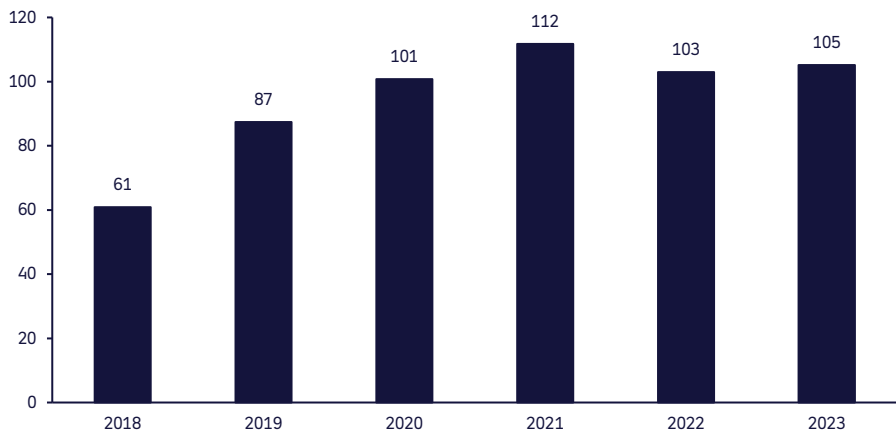
Figure 38. GGR for online casino in 2023 by game types



Source: The Danish Gambling Authority's gambling control system

Online bingo was liberalised in 2018. In 2018, the GGR was DKK 61 million, but has increased since then as did the overall online casino market until 2022, when there was a decrease, cf. figure 39. From 2018 to 2023, bingo's share of the online casino market has increased from 2.4 to 3.4 per cent.

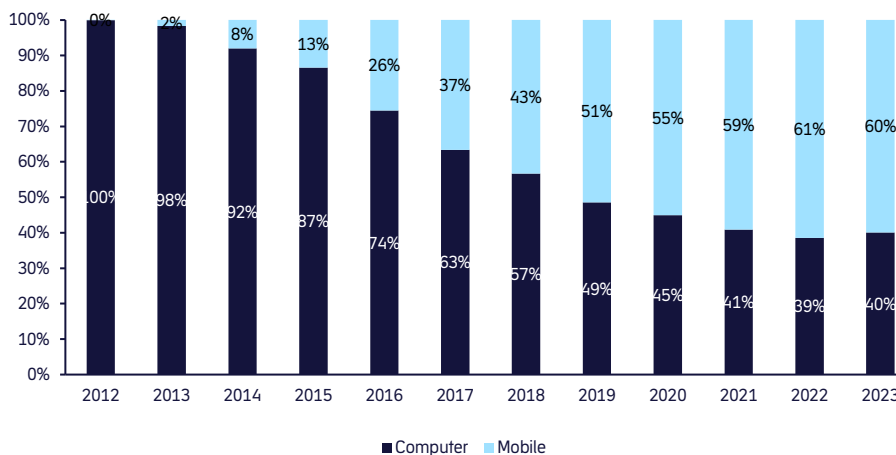
Figure 39. GGR for online bingo 2018-2022, DKK million



Source: The Danish Gambling Authority's gambling control system
 Note: 2023 prices

Since 2012, there has been an increasing tendency for Danes to gamble on online casinos on mobile devices such as mobile phones or tablets rather than on the computer. In 2023, the share of GGR for online casinos coming from games on mobile devices was 60 per cent, cf. figure 40. In 2022, this share was 61 per cent and 2023 is therefore the first year since 2012 where there has been no increase for mobile devices. In 2012, almost all GGR was generated from gambling on computers.

Figure 40. Online casino GGR by sales channels, 2012-2023



Source: The Danish Gambling Authority's gambling control system

