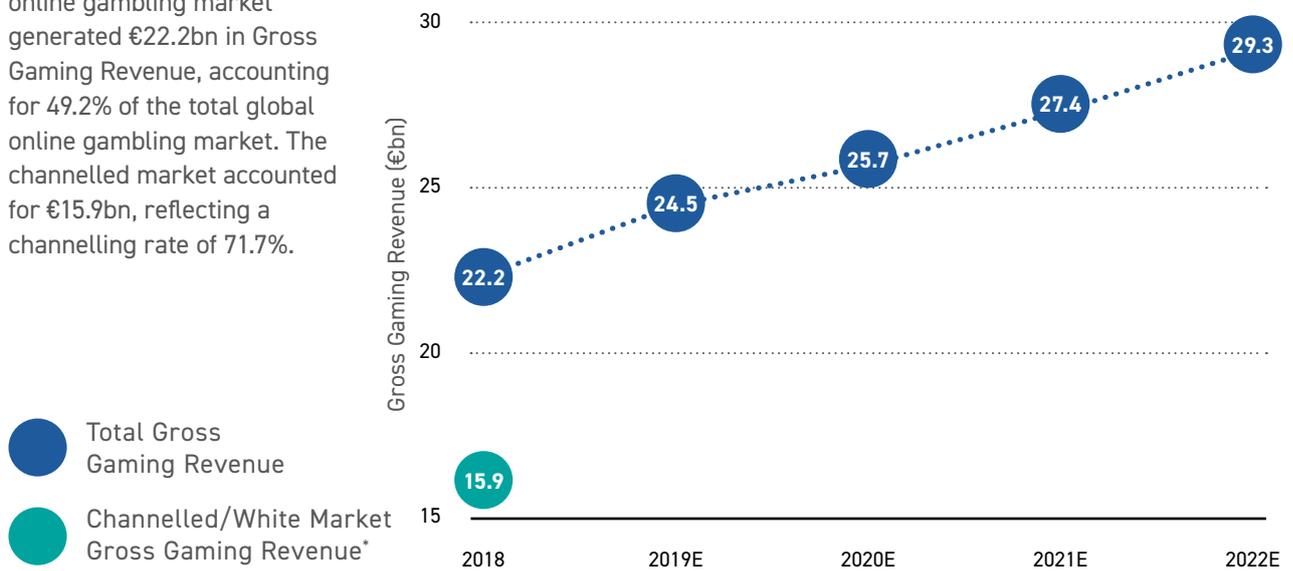


European Online Gambling Key Figures 2018

Online Gambling Market (EU-28)

In 2018, the total EU-28 online gambling market generated €22.2bn in Gross Gaming Revenue, accounting for 49.2% of the total global online gambling market. The channelled market accounted for €15.9bn, reflecting a channelling rate of 71.7%.



* Online gambling activity which is "regulated in the same jurisdiction as the player," according to H2 Gambling Capital. Source: H2 Gambling Capital (2019).

Gambling Market Shares (EU-28)

In 2018, online gambling had a total Gross Gaming Revenue of €22.2bn, accounting for 23.2% of the total EU-28 gambling market. Meanwhile, offline gambling (lotteries, casinos, bookmakers shops, etc) had a total Gross Gaming Revenue of €73.5bn, accounting for 76.8% of the overall EU-28 gambling market.



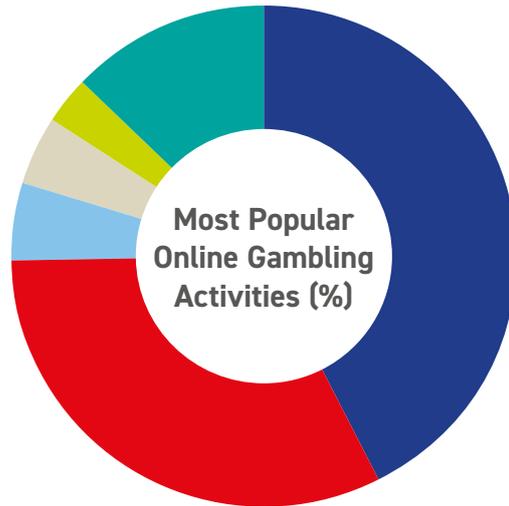
Source: H2 Gambling Capital (2019).

European Online Gambling: Key Figures 2018

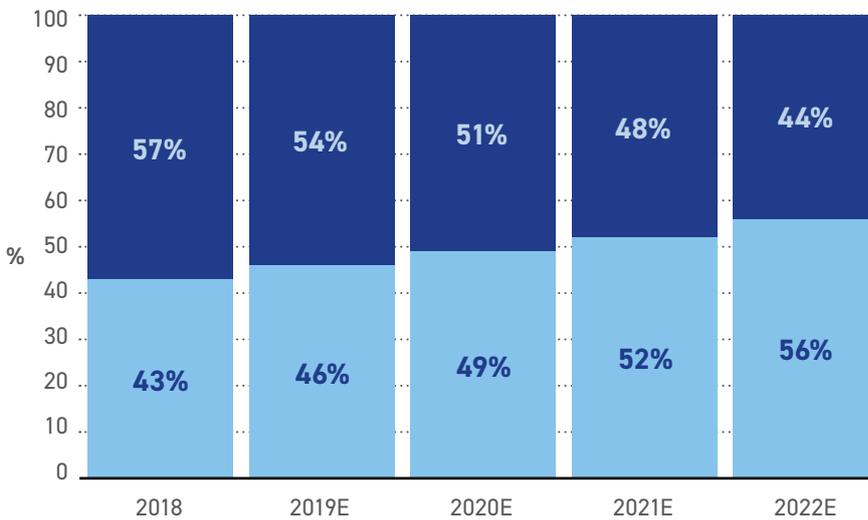
Most Popular Online Gambling Activities (EU-28)

Sports betting	42.5%
Casino	32.4%
Poker	5%
Bingo	4.3%
Other/Skill Gaming	3.2%
Lottery	12.6%

Source: H2 Gambling Capital (2019).



Betting Devices Use (EU-28)



In 2018, 57% of online bets were placed from a desktop computer, while 43% of online bets were placed from mobile devices.*

* Based on Gross Gaming Revenue.

Desktop
Mobile Devices
(phones and tablets only)

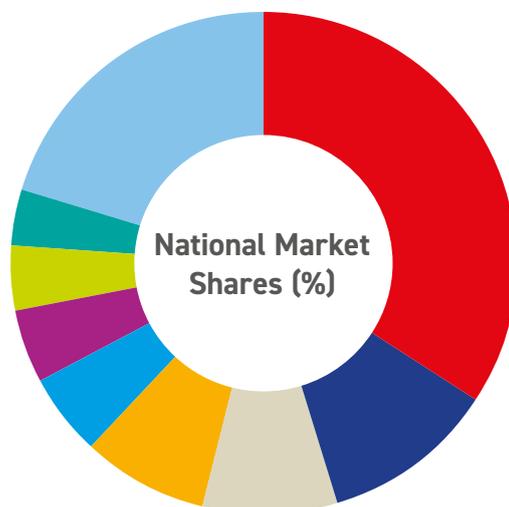
Source: H2 Gambling Capital (2019).

National Online Gambling Market Shares (EU-28)

In 2018, the UK market (34.2%) accounted for the largest portion of the total EU-28 online gambling market, based on Gross Gaming Revenue. Germany (11.1%), France (8.8%) and Italy (8.1%) were the next biggest national markets.

United Kingdom	34.2%
Germany	11.1%
France	8.8%
Italy	8.1%
Sweden	5.2%
Spain	4.7%
Finland	4.1%
Denmark	3.6%
All others combined	20.2%

Source: H2 Gambling Capital (2019).





Value

- Combined **€5.41 BILLION GROSS GAMING REVENUE**¹ in EU-28
- Representing **24% OF THE EU-28 ONLINE GAMBLING MARKET** (GGR)
- Processed a total of **31.6 BILLION BETS**²



Payments

- Processed a **TOTAL OF 320 MILLION ONLINE PAYMENTS** in deposits and withdrawals to and from players' accounts
- Offered customers **33 DIFFERENT ONLINE PAYMENT TYPES ON AVERAGE**, such as debit cards and e-wallets



Games

- Total of **€2.36 BILLION IN SPORTS BETS**
- **44% OF GROSS GAMING REVENUE FROM SPORTS BETTING**
- **63% LIVE BETTING SHARE** of sports betting revenue



Sports Sponsorship

- Contributed **€86 MILLION IN SPORTS SPONSORSHIPS** to European sports federations, leagues, clubs, and events
- **PAID OVER €132 MILLION IN SPORTS STREAMING RIGHTS** to televise sports on their websites



Customers

- A total of **16.5 MILLION CUSTOMERS**
- On average, **93% OF ALL BET MONIES RETURNED IN WINNINGS** to customers
- Average **BET ONCE EVERY 2.5 DAYS**

1. Gross Gaming Revenue (GGR) for companies is the difference between the net profit (the amount players wager minus the amount they win) and costs.
2. Includes bets and stakes for all products.





Compliance

- A total of **121 LICENCES HELD ACROSS 20 EU COUNTRIES** to provide online gambling services
- **52 LICENSING AUDITS** completed
- Subject to **23 ANTI MONEY-LAUNDERING AUDITS**
- Employing **900 DEDICATED EXPERTS** in customer due diligence, anti money-laundering and fraud prevention



Employment

- Created and sustained **32,000 JOBS**
- **27 DIFFERENT NATIONALITIES** employed
- All **24 OFFICIAL EU LANGUAGES** represented in our workforce

Licenses and offices



Licenses held



Members offices

