

Annual Activity Report 2025

EGBA | European Gaming &
Betting Association



About this report

This Annual Activity Report 2025 presents an overview of the European Gaming and Betting Association's (EGBA) work, achievements, and impact over the past 12 months.

This report details our initiatives, regulatory priorities, and collaborative efforts with both members and external stakeholders to advance industry standards and safer gambling practices. Readers will find insights into our policy work, including engagement with European institutions and national regulatory authorities on key legislative developments affecting the sector.

The report also shares valuable market data from our member operators, featuring information about their combined gross gaming revenues, stakes, customer winnings, return to player rates, product offerings, and sports betting types. Additionally, we present information about where our members have licenses in Europe.

Please note, due to onboarding of new members, the data presented in this report relates to seven out of eight member operators. In some cases, data points may be adjusted for simplicity and rounding purposes.

By sharing these activities and data points, we aim to be transparent about our work and foster a better understanding of EGBA's role within Europe's gambling sector. This report serves as both a record of our accomplishments and a benchmark for our continued commitment to raising standards across the sector.

EGBA remains grateful to our members, associate partners, and industry collaborators whose support and expertise have been instrumental in our collective progress throughout the past year.

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Message from the Secretary General



Maarten Haijer

Secretary General, EGBA

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It is my pleasure to present EGBA's second Annual Activity Report 2025, which showcases our association's achievements and impact throughout the past year. This report reflects both our growth as an organisation and our continued commitment to promoting a well-regulated, responsible gambling sector across Europe.

2024 was a significant year for EGBA's membership expansion. We welcomed Superbet Group and LeoVegas Group as new operator members, further extending our geographical coverage across Europe. We also broadened our representation with the addition of identity verification specialist Sumsb, joining as associate member. This growing and diverse membership strengthens our collective voice as we seek to enhance our capacity to drive positive change across the sector.

The fourth European Safer Gambling Week marked a milestone in our efforts to promote safer gambling, expanding to a record 26 countries with 195 stakeholders participating, including eight national gambling authorities. The campaign reached 3 million citizens with translated safety messages and featured 20 events that attracted 4,500 registrations. Those numbers are impressive, but the quality of discussion was also exceptional, with sessions exploring everything from AI trends, problem gambling survey data, to innovations in safer gambling tools.

Building on our responsibility initiatives, our 2024 Annual Sustainability Report revealed encouraging progress, with 65% of our members' European customers – a record 21 million – using safer gambling tools, and over 67 million messages sent by our members to their players in support of safer play.

On the regulatory front, EGBA continued its efforts to promote balanced frameworks that protect consumers while enabling open and fair market competition. With Finland's upcoming reforms, all EU member states will soon have adopted some form of multi-licensing – a significant milestone that validates our long-standing position that competitive, multi-licensed markets – not monopolies – are the best way to protect consumers and achieve policy goals.

Looking ahead, we will build on these achievements. We aim to make this year's European Safer Gambling Week even more impactful and refine our annual sustainability reporting even further. We will continue to promote sensible reforms in countries where there are still product prohibitions, partial monopolies, or anti-competitive licensing frameworks for online gambling.

With the new European Commission beginning its mandate, we look forward to engaging constructively with it and the other EU institutions on the latest policy issues affecting our sector. Through our work in various regulatory forums, at both EU and national level, we will continue to ensure that the gambling industry's voice is heard in key policy discussions.

I would like to thank our members, industry partners, and stakeholders across the sector whose support and expertise make our work possible and inspires us to do more. Together, we are raising standards and guiding our sector towards a more sustainable path. In the next 12 months, there is more to do, and we hope you will join us on the journey.



Maarten Haijer
Secretary General, EGBA

Key Highlights (2024)



The 4th European Safer Gambling Week, coordinated by EGBA, expanded to a record 26 countries with participation from 195 different stakeholders, reaching 3 million citizens with translated safety messages.

Together with our members, we demonstrated commitment to responsible advertising practices by conducting the second monitoring exercise for the implementation of our pan-European advertising code of conduct, this time focusing on minor protection.



To help combat Europe's black market for online gambling, we gathered evidence on fraudulent gambling apps available in app stores and presented our detailed findings to the European Commission.

EGBA was named "Institution of the Year" by JDigital, Spain's online gambling association, recognising our contributions to regulatory dialogue, raising industry standards, and safer gambling promotion across Europe.



Superbet Group, a leading operator in Central and Eastern European markets, joined EGBA, strengthening the association's representation and commitment to promoting industry standards.

We met the European Banking Authority (EBA) in Paris to discuss the new EU anti-money laundering framework, including the Anti-Money Laundering Authority (AMLA), upcoming follow up legislation from EBA and AMLA, and share information about our members' compliance efforts.



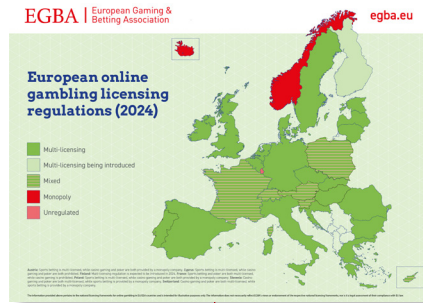
LeoVegas Group, a prominent European operator, became an EGBA member, expanding the association's reach and influence in promoting industry standards.



Our annual Sustainability Report 2024 revealed record usage of safety tools, demonstrating our members' commitment to player protection. We expanded our reporting this year with new safer gambling metrics.



Identity verification provider Sumsub joined as an associate member, extending EGBA's representation beyond operators to include compliance technology providers.



EGBA published a comprehensive analysis demonstrating Europe's significant progress toward multi-licensing regulation. With Finland's upcoming reforms, all EU member states will soon have adopted some form of multi-licensing approach.

EGBA hosted a high-level European Parliament event on the 2024 EU elections, bringing together Brussels stakeholders to discuss the implications for Europe's future.



We organised anti-money laundering workshops to educate stakeholders on the new EU rules and support implementation of the reporting obligations in EGBA's anti-money laundering guidelines.



Advancing Safer Gambling Across Europe

In 2024, EGBA and its members made significant progress in promoting safer gambling across Europe. Through coordinated campaigns, industry-leading standards, and data-driven approaches, we worked to enhance player protection while demonstrating our members' commitment to responsible operations.

European Safer Gambling Week 2024: Record Participation

The fourth annual European Safer Gambling Week (ESGW24), held 18-24 November 2024, achieved unprecedented success with record-breaking participation and geographic reach. The campaign expanded to 26 countries—a 30% increase from 2023—with Croatia, Serbia, Slovakia, and Ukraine joining for the first time.

There were 195 partners participating, representing a 20% increase from the previous year, including eight national gambling authorities—double the participation from 2023. The social media campaign

reached 3.1 million users through 1,169 posts across major platforms, a 67% year-on-year increase, with translated materials available in 27 languages.

The comprehensive events programme featured 20 specialised sessions that attracted 4,500 registrations and 3,000 attendees. These events brought together 105 speakers, including senior representatives from gambling authorities in Belgium, Denmark, France, and the UK, to discuss AI trends, problem gambling prevalence reporting, and innovations in safer gambling tools.

More information:

- [Record Participation As European Safer Gambling Week Expands To 26 Countries.](#)





Sustainability Report 2024: Record High Safety Tool Use

EGBA's fourth annual sustainability report reveals significant progress in promoting safer gambling across Europe during 2023. The report shows a record 21 million customers (65% of the total) used safety tools—representing a 14% increase from the previous year—with more than half doing so voluntarily.

Our members sent an unprecedented 67.6 million messages to customers promoting safer play, a 49% yearly increase. Over 23 million of these communications were personalised based on actual playing behaviour, demonstrating our commitment to targeted intervention.

The Sustainability Report 2024 tracks yearly progress, supports transparency, and reinforces social responsibility across the sector. It includes key sustainability highlights and comprehensive data on customers, safer gambling tools, social contributions, employment, diversity, and environmental impact.

This year's report features expanded metrics on safety tool usage and safer gambling messaging, along with a joint letter from member CEOs

expressing concerns about Europe's growing black market for online gambling and the risks it poses to player protection progress.

More information:

- [Safer Gambling Tools Use Hits Record High In 2023 – New Report From EGBA.](#)

Demonstrating Commitment to Responsible Advertising Practices

The second monitoring exercise of EGBA's pan-European responsible advertising code, conducted by the independent European Advertising Standards Alliance (EASA), has revealed strong compliance among EGBA members with minor protection measures, particularly in traditional advertising channels.

The assessment, completed in December 2024, evaluated 120 advertisements across television, YouTube, websites, and social media in Greece, Spain, Romania, and the UK. Self-Regulatory Organisations in these markets assessed compliance with both the EGBA code and national requirements, focusing on content moderation, managing minors' exposure, and age verification safeguards.

Advancing Safer Gambling Across Europe (continued)

Results showed high compliance in television advertising and YouTube platforms, with successful implementation of age-limit requirements and restrictions on celebrities and cartoon characters appealing to minors. While social media advertising demonstrated strong adherence to age-limit symbol requirements, the monitoring identified areas for improvement in the consistent application of rules applicable on social media.

The assessment of influencer marketing practices revealed strong compliance with content moderation requirements, though more consistent use of paid marketing disclosures was recommended.

EGBA will use these findings to enhance code effectiveness and continues to invite non-member operators to join the initiative.

More information:

- [EGBA Members Assess Minor Protection Advertising Measures In Latest Code Monitoring.](#)

Markers of Harm Standardisation Project Makes Progress

The European Committee for Standardisation (CEN) project on markers of harm for online gambling, initiated by EGBA in 2022, continued to make progress in 2024. This important initiative aims to establish a set of standardised behavioural indicators to help identify problematic gambling behaviours more quickly and accurately.

The standardisation process, which began in 2023, brings together diverse expertise from academia, gambling regulators, operators, and harm prevention professionals across Europe. The project is developing a common definition and framework for markers of harm that will provide operators with better tools to detect and prevent gambling-related problems.

During 2024, the expert working group completed several meetings and milestones in the standardisation process, carefully refining the technical specifications and behavioural indicators that will form the core of the standard. The project is expected to be finalised by the end of 2025 and will be voluntary in nature.

The Gambling Regulators European Forum (GREF) recently issued a statement supporting this standardisation initiative, further validating its importance for improving player protection across European markets.

More information:

- [EGBA Welcomes GREF Support For European Standard On Markers Of Harm.](#)

"The record-breaking participation in European Safer Gambling Week 2024 demonstrates that safer gambling is now a truly pan-European priority, with nearly 200 stakeholders from 26 countries uniting in our collective commitment to enhance player protection across the continent."

Barry Magee,

Senior Communications Manager, EGBA

Shaping Regulatory Frameworks and Policy



Throughout 2024, EGBA actively contributed to regulatory discussions across Europe, advocating for balanced frameworks that protect consumers while enabling competitive, licensed markets. Our work spanned from high-level EU-wide legislative frameworks to specific national regulatory reforms.

Joint CEO Letter From EGBA Members Warns of Black Market Risks

EGBA's member CEOs published a joint letter highlighting the growing risks posed by Europe's black market for online gambling to player protection and industry progress. The letter, published in our 2024 Sustainability Report, emphasised that only competitive, well-regulated markets can effectively safeguard players while channelling them away from unregulated websites. The CEOs warned that overly restrictive regulations in regulated markets can inadvertently drive players toward black market operators, which typically offer no player protections, age verification, or responsible gambling tools. They called for balanced regulatory approaches that both

Shaping Regulatory Frameworks and Policy (continued)

protect players and maintain the attractiveness of licensed offerings. The letter underscored EGBA members' commitment to raising industry standards through both regulatory compliance and voluntary initiatives, while expressing concern that regulatory trends risking high market channelisation could undermine the progress made in player protection across Europe's regulated markets.

More information:

- [Joint CEO Letter: Competitive, Regulated Online Markets Are The Only Solution To Safeguard Players.](#)

"With Finland's upcoming reforms completing the EU-wide shift to multi-licensing, we've reached a milestone that validates our long-standing position that competitive, regulated markets are the most effective way to protect consumers and combat the black market."

Daniele Perrone,

Senior Regulatory Affairs and Policy Advisor, EGBA



Multi-licensing Analysis Shows Europe's Regulatory Progress

EGBA published a comprehensive multi-licensing analysis demonstrating Europe's significant progress toward multi-licensing regulation for online gambling. The analysis found that 27 out of 31 European countries now employ some form of multi-licensing, highlighting the continent's steady move away from monopoly systems.

The study examined regulatory frameworks across Europe, identifying different approaches to licensing while documenting the clear trend toward competitive markets with strong regulatory oversight. It highlighted how multi-licensing creates properly regulated environments that better protect consumers while generating significant tax revenues for governments.

With Finland's upcoming reforms, all EU member states will soon have adopted some form of multi-licensing approach. This represents a significant milestone in European gambling regulation and validates EGBA's long-standing advocacy for competitive, regulated online gambling markets as the most effective way to ensure player

protection while combating the black market.

More information:

- [Europe Is Well On Its Way Towards Full Multi-Licensing For Online Gambling – New Analysis.](#)

Advocacy for Multi-licensing Regulatory Reform

Throughout 2024, EGBA actively advocated for multi-licensing regulatory frameworks in several European jurisdictions still maintaining monopoly systems. In Finland, EGBA welcomed draft legislation outlining the country's new gambling framework while submitting focused recommendations to strengthen player protections and ensure effective channelisation.

In Austria, EGBA called for multi-licensing of online casino to be included in the incoming government's agenda, highlighting how a modern regulatory framework would better protect Austrian players while generating additional tax revenues.

EGBA also engaged with Icelandic authorities, providing technical information to Iceland's Chamber of Commerce for their report recommending licensing

reform. This resulted in the Chamber publishing recommendations for a licensing system that includes international operators, noting Iceland's current low 20% channelisation rate under its monopoly system.

More information:

- [Finland's New Gambling Legislation: A Step Forward, With Room For Improvement.](#)
- [Austria At A Crossroads: EGBA Calls For Modern Regulation For Online Casino Gaming.](#)
- [Time to shuffle the cards in Iceland \(EGBA op-ed in Icelandic media\).](#)

Strengthening Anti-Money Laundering Standards

EGBA significantly expanded its anti-money laundering (AML) initiatives in 2024, organising specialised workshops in Malta to educate the wider industry about the EU's new AML framework and promote the adoption of EGBA's industry guidelines on AML. EGBA also educated its members about the EU's AML package and the implementation of the association's industry guidelines, bringing together operators, payment providers, and compliance

experts to discuss practical implementation challenges and share best practices.

We welcomed the finalisation of the EU's AML framework and the establishment of the Anti-Money Laundering Authority (AMLA), supporting the modernisation of AML regulations for the gambling sector. EGBA met with the European Banking Authority (EBA) in Paris to discuss implementation of the new EU AML framework, the establishment of AMLA, the upcoming legislation and guidance that will come from AMLA and the EBA, and to educate and share information about how our members conduct AML. We also discussed EBA's upcoming consultative process on AML implementation standards, and already shared specific gambling sector considerations for customer due diligence, and future EU anti-money laundering legislation.

EGBA's AML guidelines received recognition from national authorities with several highlighting them as a valuable industry resource.

More information:

- [EGBA Welcomes Finalisation Of New EU Anti-Money Laundering Framework.](#)

Fostering Cooperation and Knowledge Sharing

Bringing stakeholders together remained a cornerstone of EGBA's approach in 2024. We created multiple forums for dialogue between regulators, operators, and industry associations, fostering a collaborative approach to addressing shared challenges.

Facilitating Knowledge Exchange With Regulatory Authorities

EGBA hosted two dedicated meetings for Europe's national gambling authorities in 2024, bringing together representatives from over 20 different jurisdictions to share information and discuss emerging regulatory challenges. These meetings provided a valuable forum for regulatory authorities to exchange perspectives on key issues affecting the online gambling sector across Europe. During the summer meeting, which attracted 44 representatives from 20 authorities, the French gambling authority (ANJ) presented its recent annual report on France's gambling market. H2 Gambling Capital shared the latest European market data, while EGBA presented a summary of the EU's

anti-money laundering package and its implications for the gambling sector. These regulator meetings, which EGBA has been organising for several years, help maintain open communication channels between industry and regulatory stakeholders, fostering a collaborative approach to addressing challenges in the online gambling sector while allowing EGBA to better understand regulatory authorities' concerns and priorities.

Strengthening Coordination Within the European Gambling Industry

EGBA hosted several meetings for Europe's online gambling trade associations in 2024, bringing together representatives from more than 10 national associations to share knowledge, experiences, and best practices. These meetings facilitated better cooperation and information exchange within the industry, providing an important launch pad for joint industry actions like the European Safer Gambling Week. The in-person meeting in Malta brought together over 20 participants, including representatives from trade associations and the Malta Gaming Authority. Association representatives shared updates on

"By creating structured forums for dialogue between regulators, operators, industry associations, and other stakeholders, we've fostered a collaborative approach that transforms shared challenges into opportunities for raising standards across the European gambling sector."

Vasiliki Panousi,
EU Affairs Manager, EGBA



their latest priorities and activities, while the MGA's new CEO introduced himself and presented the authority's latest international initiatives, including their work on sports betting integrity. The trade association meetings highlight EGBA's commitment to fostering industry-wide cooperation and demonstrate how a stronger, more unified industry voice can contribute to raising standards across the European online gambling sector.

European Parliament EU Elections Event

EGBA hosted a high-level event in the European Parliament ahead of the 2024 EU elections, bringing together Brussels stakeholders to discuss the implications of the election results for Europe's future. The informative and interactive afterwork event provided attendees with insights from bookmakers and pollsters about the likely outcomes, alongside expert analysis of potential impacts on EU politics and policies. The event featured distinguished speakers including MEP Toine Manders, journalists from Reuters and France 24, polling expert Mathieu Gallard from Ipsos, Kyle McGrath (Head of Political Betting at Ladbrokes), and leading EU policy analysts.

Over 40 attendees participated, including representatives from the European Parliament, Member State embassies, consultancies, and NGOs. This Brussels event successfully connected EGBA's members' bookmaking expertise with topics of EU-level importance, demonstrating the industry's professionalism while educating stakeholders about how betting odds are created. It represented an innovative approach to stakeholder engagement that positioned EGBA and its members as valuable contributors to broader EU policy discussions.

More information:

- [EU Elections 2024: Predicting The Outcome And What's At Stake For The Future Of Europe.](#)

Strengthening Industry Representation

EGBA's membership base expanded in 2024, bringing together a more diverse range of operators and technology providers. This broader representation enhances our collective expertise and capacity to raise standards across the European industry.

EGBA's Growing Membership Network

EGBA expanded its membership with membership partnerships that enhance its position as the leading voice for Europe's online gambling sector. Sumsb joined as the first identity verification provider associate member, bringing expertise in KYC and fraud prevention to support EGBA's mission of promoting a secure gambling environment. The addition of LeoVegas Group strengthened EGBA's Nordic presence, while Superbet Group extended the association's reach across Central and Eastern Europe.

We are pleased to work with these new members to help raise industry standards on responsible advertising, safer gambling, and anti-money

laundering. Each new member has their own specialised expertise which will contribute to EGBA's collective efforts to promote a well-regulated, sustainable gambling sector throughout Europe.

More information:

- [LeoVegas Group Joins The European Gaming And Betting Association.](#)
- [Superbet Group Joins The European Gaming And Betting Association.](#)
- [EGBA Welcomes Sumsb As Newest Associate Member.](#)

EGBA Honoured as "Institution of the Year" at Jdigital Awards

EGBA was recognised with the "Institution of the Year" award at the Jdigital 2024 Awards ceremony in Madrid. This significant honour acknowledges the association's outstanding contributions to institutional and regulatory dialogue, reputational campaigning, and the promotion of best practices throughout the European online gaming and betting sector. The award, presented by Jdigital and its members, serves as recognition of EGBA's

continued leadership and commitment to raising industry standards. We are grateful to Jorge Hinojosa and the Jdigital team for this recognition.

More information:

- [EGBA Awarded "Institution Of The Year" At Jdigital Awards.](#)

"Our expanded and increasingly diverse membership enhances EGBA's collective expertise and strengthens our ability to drive meaningful change across the European gambling sector, bringing together complementary perspectives that advance our work on industry standards and consumer protection."

Maarten Haijer,
Secretary General, EGBA

Raising Industry Profile At Events

EGBA significantly expanded its public presence in 2024, with key representatives delivering expert presentations at over 15 high-profile industry events across Europe. The association spoke at major conferences including SBC Summit Lisbon, ICE London, Gaming in Spain, NEXT in Malta, Spillebranchen and Sumsb events during European Safer Gambling Week, and those organised by BAGO, Hipther, and Kindred's Sustainable Gambling Conference. EGBA also participated in the prestigious joint International Association of Gaming Regulators (IAGR) and International Masters of Gaming Law (IMGL) Regulatory Masterclass about industry reputation to an audience of regulators and influential legal experts. We also shared insights on the Better Gaming Show about our responsibility initiatives, including the European Safer Gambling Week. These diverse appearances and speaking engagements enabled EGBA to share its expertise, promote industry best practices, and advance the conversation about responsible gambling standards across a wider audience than ever before.

Voice at the Table

As EGBA's membership continues to grow, so too does our work on policy discussions across Europe. The following section highlights some of the ways we've represented the industry's interests in key regulatory forums throughout 2024.

- In formal consultations with European Commission officials on the **Fitness Check on Digital Fairness**, we shared information about how consumer protection is conducted in Europe's online gambling sector.
- We provided the gambling sector perspective during engagements with EU institutions and member state authorities on **Digital Services Act** implementation.
- Through technical input to EU discussions on **Payment Regulations**, we ensured proposed frameworks maintain secure and accessible payment options for regulated gambling operators.
- By maintaining active dialogue with EU stakeholders on the **European Accessibility Act** implementation, we guided our members ahead of the June 2025 compliance deadline.
- To help combat Europe's black market for online gambling, we gathered and presented detailed evidence on fraudulent gambling apps to the **European Commission**.





- In 2024, EGBA collaborated with the **European Commission and cross-industry stakeholders** within a memorandum of understanding (MoU) to protect intellectual property rights in online advertising. The initiative advances more responsible practices across the European advertising landscape.
- In meetings with the **European Banking Authority**, we discussed its upcoming consultative process on anti-money laundering implementation standards and shared specific gambling sector considerations.
- We participated in the first meeting of the **Council of Europe's** project on "promoting the mental health of children and youth by addressing online gambling and gaming risks."
- EGBA contributed expertise to technical discussions in the **European Parliament** hosted by Anti-money Laundering Europe and The Association of Financial Crime Prevention Professionals, sharing compliance best practices from our sector.
- As members of the **European Commission's "Better Internet for Kids" initiative**, we contributed to its evaluation at the Commission's **Safer Internet Forum** and participated in discussions about current online threats for minors.
- We shared data and best practices on regulatory framework design in bi-lateral meetings with **government authorities**, including ministers, in several European jurisdictions.
- Through our meeting with **financial intelligence units** in several EU member states, we supported implementation of effective anti-money laundering guidance for the gambling sector.
- By submitting **11 formal responses to EU or national regulatory proposals** or consultations, we provided evidence-based positions and comparative European perspectives to inform policy developments.

Our members

bet365

bet365.com

betsson group

betssongroup.com

Σntain

entaingroup.com

evoke

evokeplc.com

FDJ UNITED 

fdjuned.com

Flutter[™]

flutter.com



leovegasgroup.com

SUPERBET

superbetgroup.com

Associate members

aircash

aircash.eu

 **sumsub**

sumsub.com

Where our members are licensed

1. Belgium
2. Bulgaria
3. Croatia
4. Cyprus
5. Denmark
6. Estonia
7. France
8. Germany
9. Greece
10. Ireland
11. Italy
12. Latvia
13. Lithuania
14. Malta
15. Netherlands
16. Poland
17. Portugal
18. Romania
19. Spain
20. Sweden
21. UK

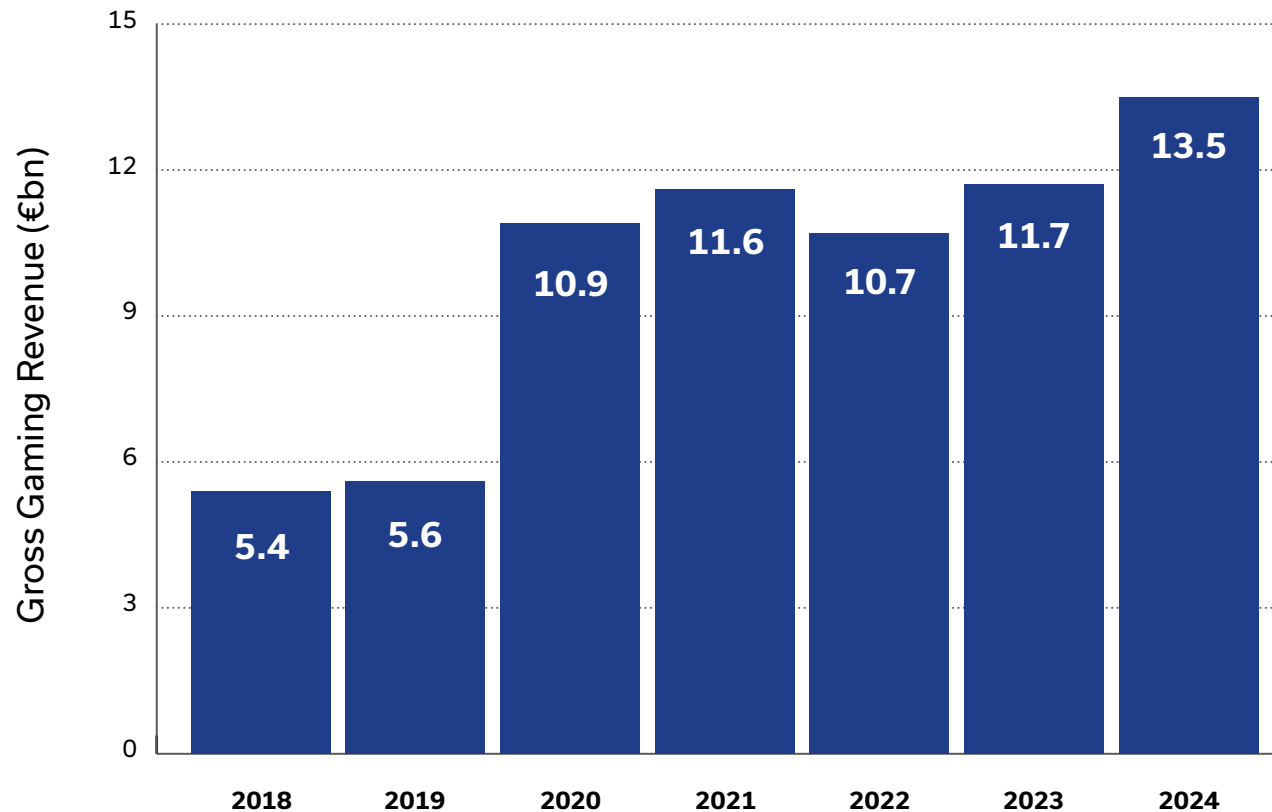
EGBA members meet the highest regulatory standards and collectively hold 321 online gambling licenses, each with its own stringent compliance requirements, to offer their services across 21 different European countries.



Data from our members

Gross gaming revenue

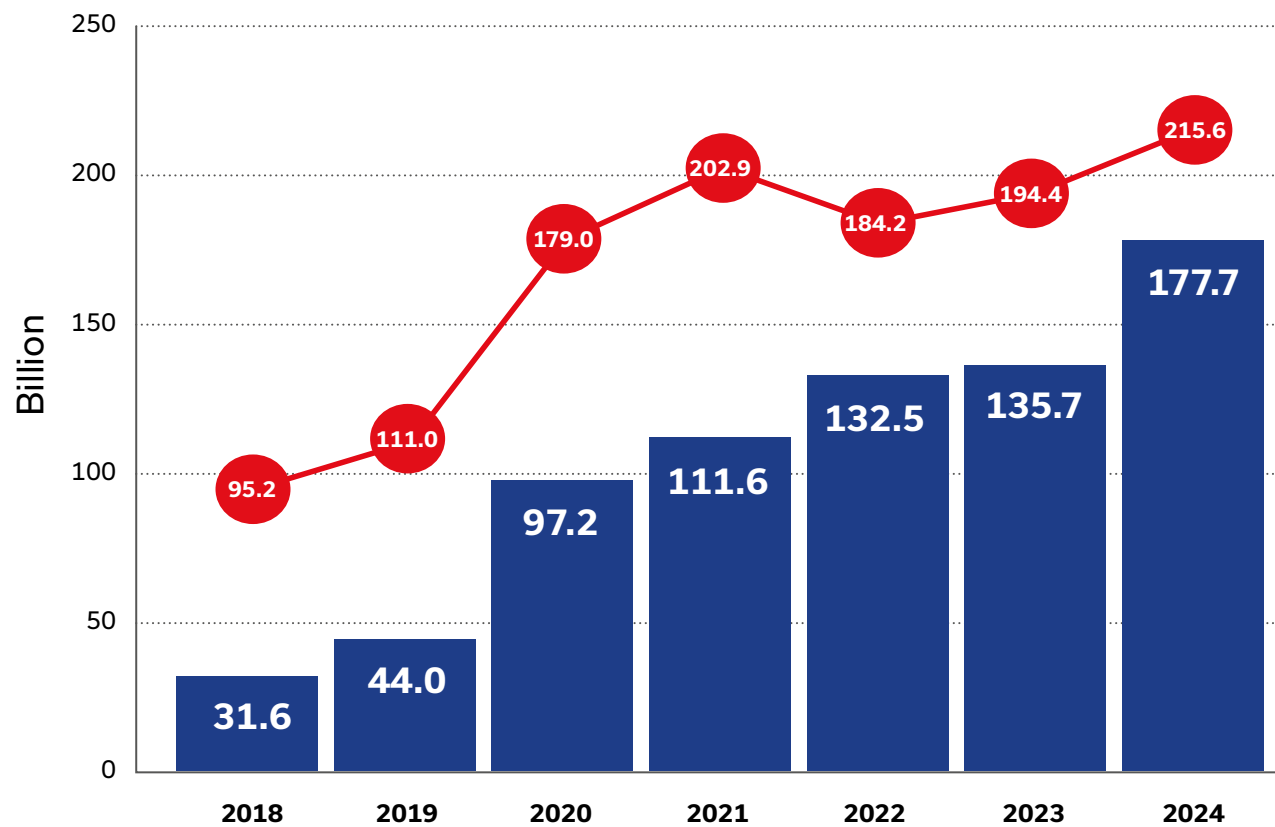
Our member's combined online gross gaming revenue increased 15% in 2024 to €13.5 billion. Gross gaming revenue is the total value of player bets or stakes minus the amount paid out to players as winnings, representing the revenue a gambling operator earns before deducting expenses and taxes.



Stakes

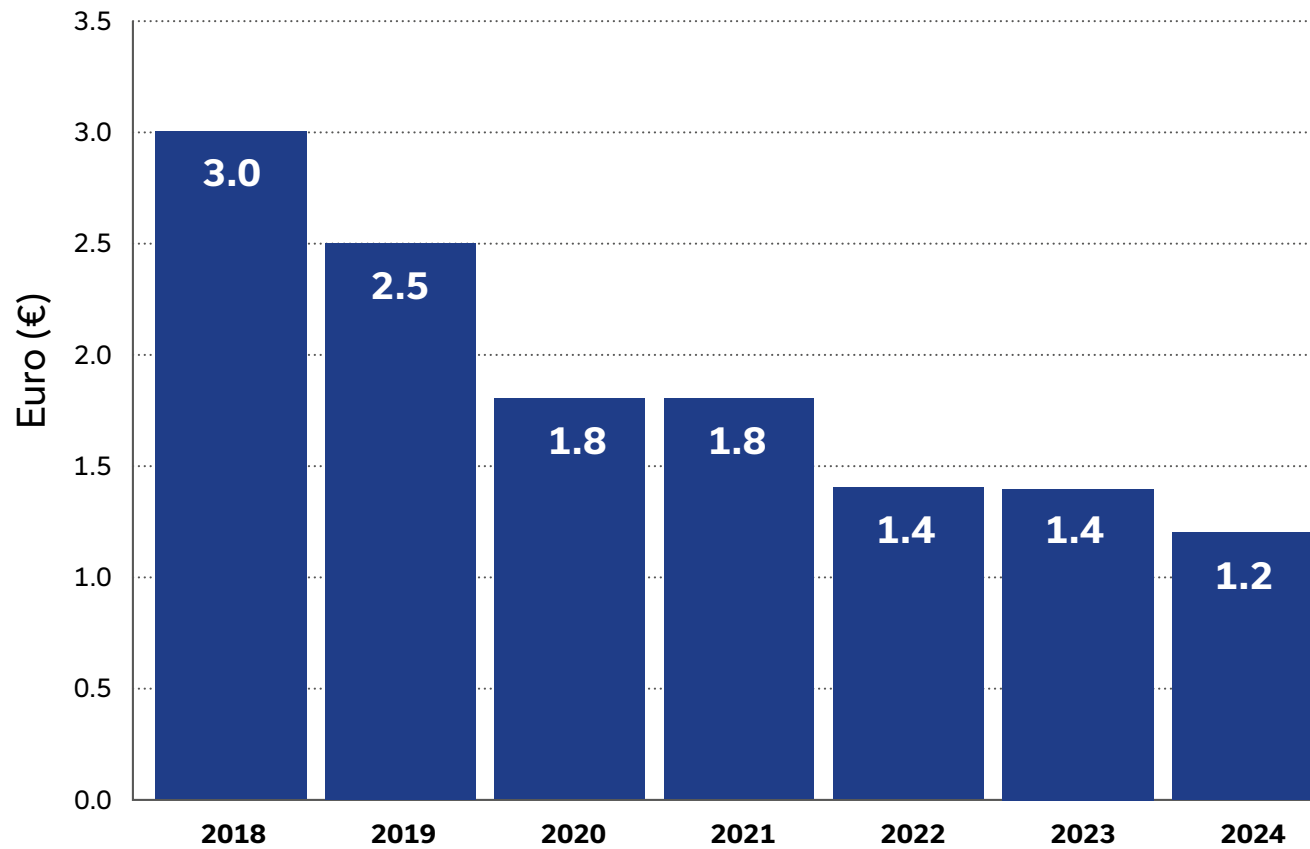
In 2024, the number of online stakes grew by 31% to 177.7 billion, while the value of stakes increased by 11% to €215.6 billion.

- Value of stakes (€)
- Number of stakes



*Includes bonuses.

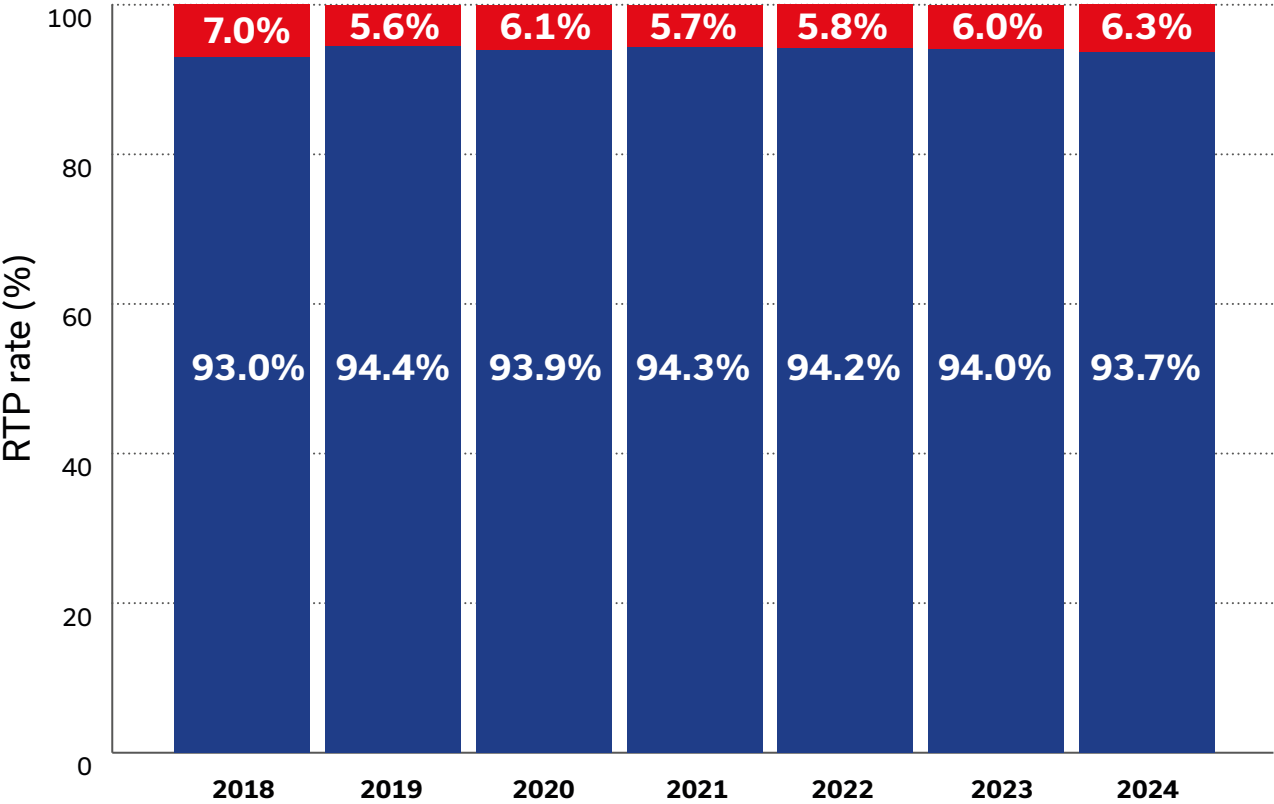
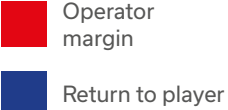
Average stake



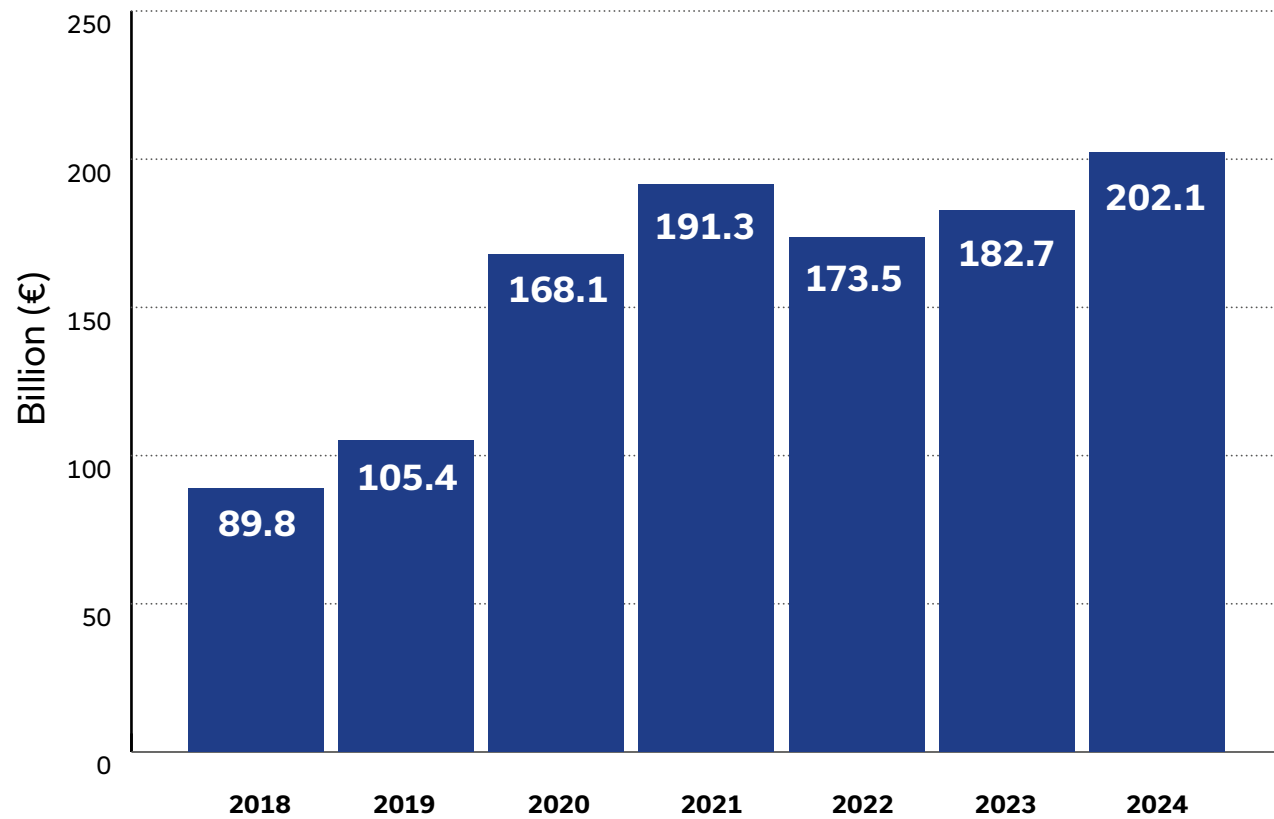
In 2024, the average stake across all online products was €1.20, a 14% reduction compared to the previous year.

Return to player rate

In 2024, the average return to player (RTP) rate was 93.7%. RTP is the proportion of stakes that are returned to players as winnings, on average, expressed as a percentage of the total value of stakes.



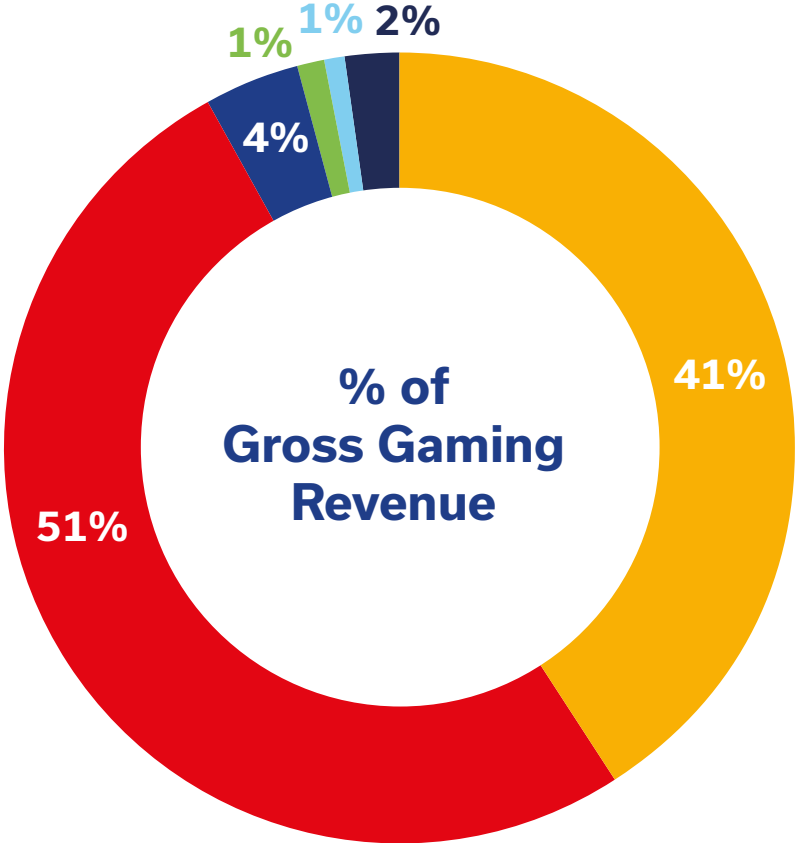
Player winnings



In 2024, the estimated combined player winnings were €202.1 billion, an increase of 11% compared to the previous year.

Product shares

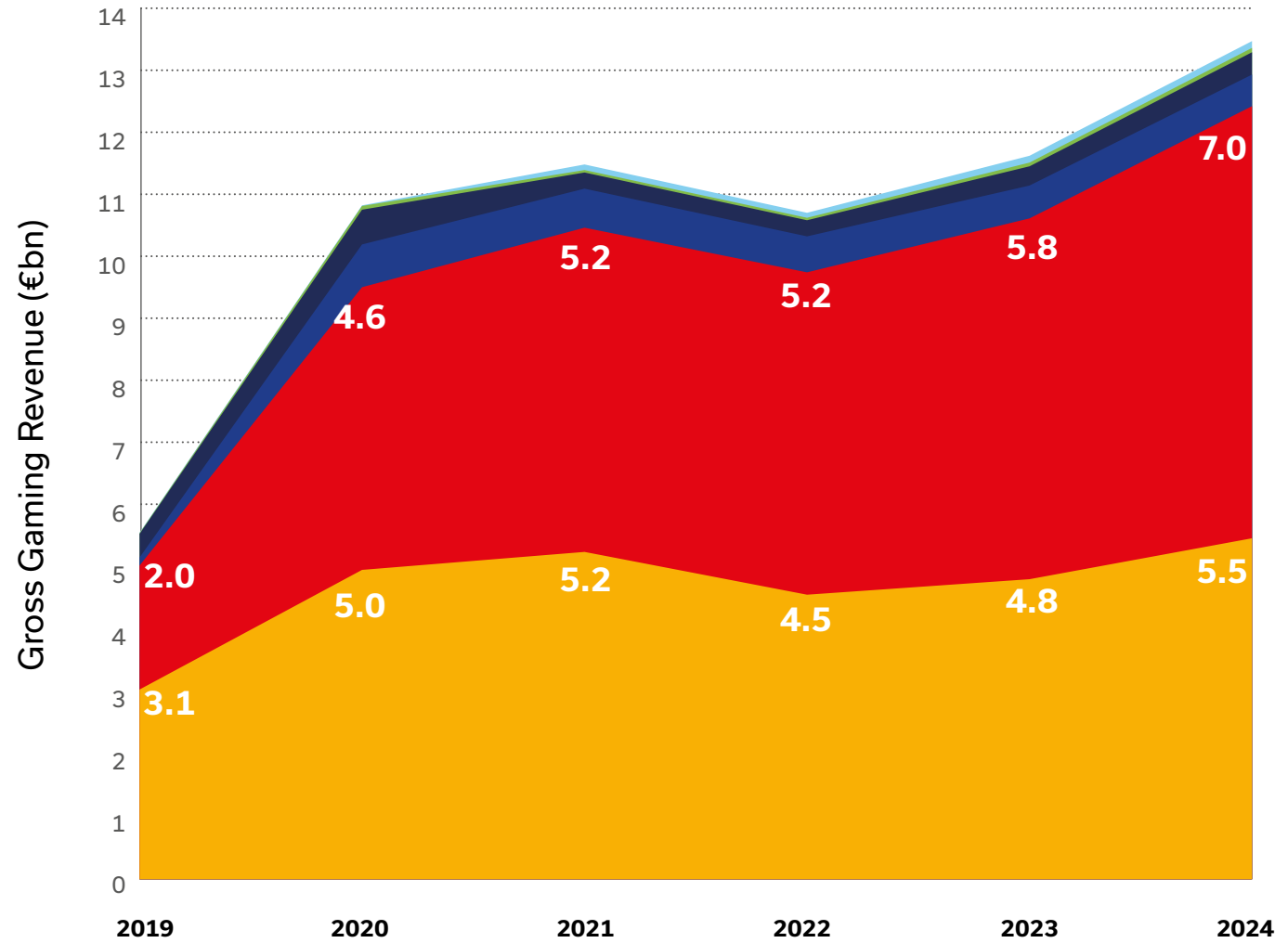
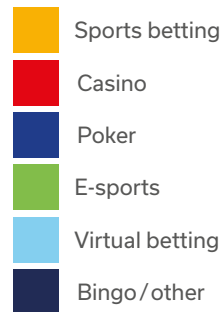
In 2024, casino represented the largest segment of online gross gaming revenue at 51%, followed by sports betting at 41%. Smaller segments included poker (4%), bingo and other gambling products (2%), while e-sports and virtual betting each accounted for 1% of total revenue.



- Sports betting
- Casino
- Poker
- E-sports
- Virtual betting
- Bingo/other

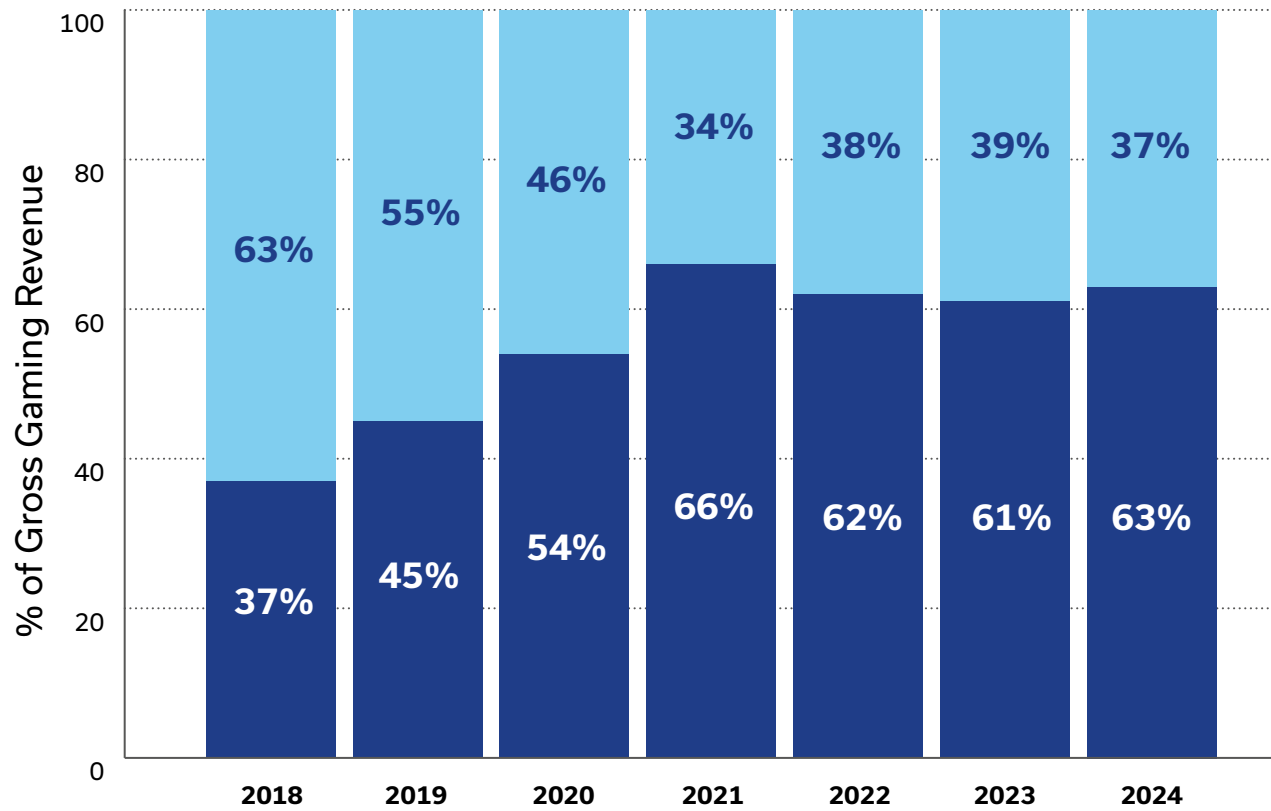
Product revenues

Casino games generated the largest revenue among online gambling products (€7.0 billion, +22% compared to 2023), followed by sports betting (€5.5 billion, +15%). Bingo and other gambling products showed significant growth (+19%), as did e-sports (+16%). Virtual betting maintained similar revenue levels year-over-year, while poker experienced a slight decrease (-5% compared to 2023).

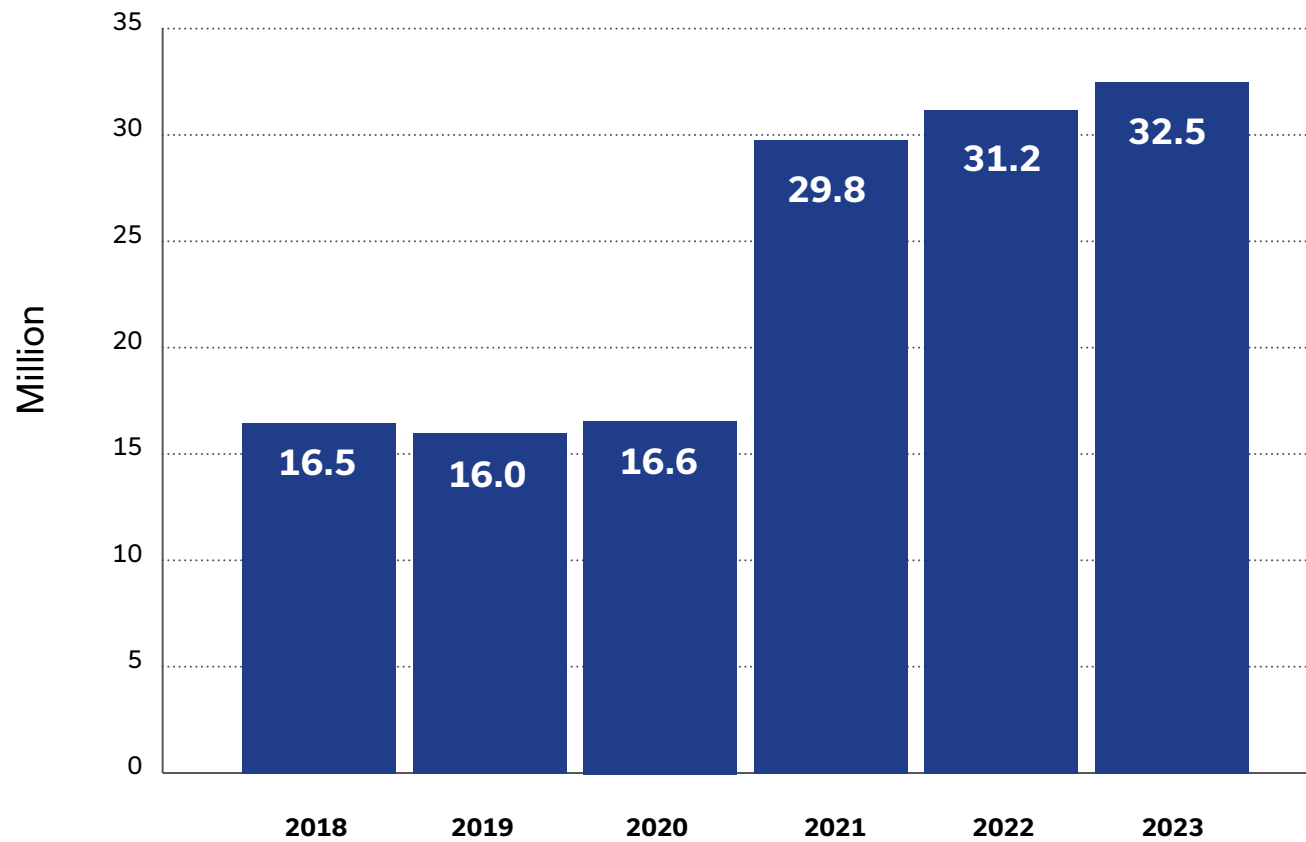


Sports betting types

The share of online sports betting revenue from in-play bets has declined from 63% in 2018 to 37% in 2024. Pre-match betting now represents the majority of sports betting gross gaming revenue at 63%.



Player accounts



The total number of online player accounts increased to 32.5 million in 2023, representing a 4% yearly increase.

Based on active customer accounts where a customer has placed a bet at least once during the reporting year, including the use of a bonus.

About us

As the collective voice for Europe's online gambling sector, the European Gaming and Betting Association (EGBA) is the Brussels-based trade association representing the leading online gambling operators established, licensed, and regulated within the EU. In a rapidly evolving regulatory and market landscape, the EGBA promotes a competitive, innovative, and well-regulated market that balances sustainable growth with strong consumer safeguards.

EGBA works together with national and EU authorities, and other stakeholders, towards a well-regulated and well-channelled online gambling market that recognises the realities of the internet and consumer demand while providing a high level of consumer protection. We promote smart regulations that make regulated online gambling sufficiently attractive to channel consumers away from unregulated websites that lack adequate protections.

As leaders in safer gambling, EGBA members adhere to various EGBA industry standards and codes to complement the many different and stringent licensing requirements they already comply with in European countries. We coordinate significant initiatives like the annual European Safer Gambling Week, which promotes safer gambling across the continent. Our comprehensive industry codes establish benchmarks for anti-money laundering, player safety, fairness, and responsible advertising, complementing the extensive licensing requirements our members fulfil across Europe.

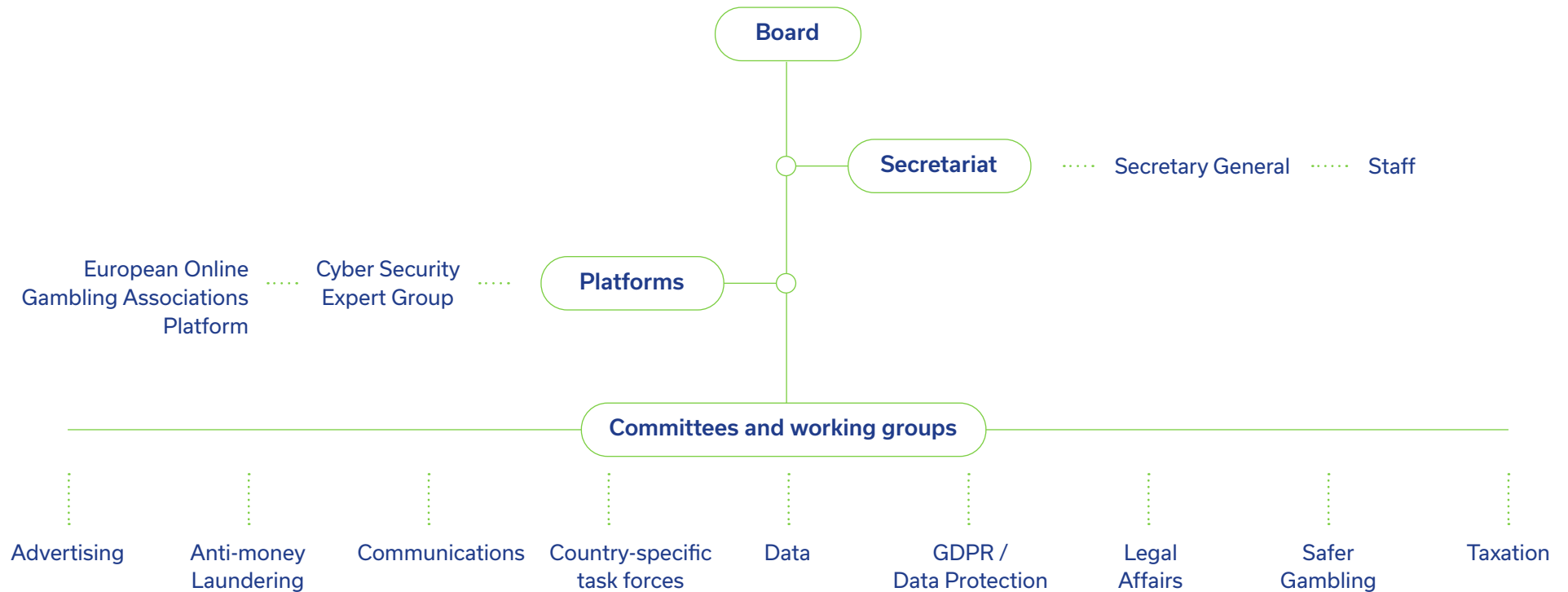
Our membership represents significant market presence and regulatory compliance, with our operators collectively holding 321 online gambling licenses across 21 European countries, demonstrating their commitment to operating within regulatory frameworks. EGBA members generate approximately one-third of Europe's regulated online gambling gross gaming revenue (GGR).

EGBA members actively protect sports integrity through their participation in the International Betting Integrity Association (IBIA). This collaboration has established sophisticated monitoring systems and

alert platforms, working directly with major sports governing bodies including FIFA and the IOC to identify and prevent match-fixing.

EGBA has maintained registration in the EU Transparency register since 2009 (registration number: 29508582413-52), reflecting our long-standing commitment to open dialogue and transparency in our work. Looking ahead, we remain committed to being a responsible and trustworthy representative for Europe's online gambling sector and promoting a safe and sustainable gambling environment across the continent.

Our structure



This organisation chart is for illustrative purpose only and does not represent the legal structure of the association.

Our team



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