

MECN
Media & Entertainment Consulting Network

Denmark's Gambling Market **Small giant in the North – paving the way for Scandinavia?**

Report on all gambling sectors in Denmark – betting, lottery, casino, machines, and interactive/online gambling

London/Munich/Copenhagen, November 2009

Go to www.denmark-gambling.mecn.net to obtain full report.

In cooperation with the following legal experts:

HORTEN

Summary

Currently, the French liberalisation plans are probably getting most of the industry's attention. But in the background, at times almost neglected, several other countries, such as Denmark, are setting about liberalising large parts of their gambling market.

Denmark's gambling market may not be as big as that of France or Italy, but the planned liberalisation is nevertheless highly relevant for the global market:

- **Denmark is one of the first to liberalise its gambling market** - The Danish government is one of the first in both the EU and Scandinavia to respond to the growing market share of Internet gambling operators and to the increasing pressure of the European Commission by liberalising its gambling market.
- **Liberalisation goes beyond the online gambling sector** - Whereas the French draft law limits liberalisation to selected online games, the Danish government goes further and also plans to open up the retail/land-based betting market. We believe that an expansion to the retail sector is a more sustainable solution and therefore more likely to be taken up and adapted in other European countries.
- **Denmark: paving the way for Scandinavia?** - It is still an open question how developments in Denmark will influence the current discussions in the other, more protectionist, Scandinavian states. We believe that other Scandinavian states will closely watch the implementation of Denmark's liberalisation plans, its challenges, private operators' actions, developments of tax/levies, and, last but not least, the impact on problematic gambling.
- **A Danish license: a must for private operators active in Scandinavia** - MECN believes that private operators with a focus on Scandinavia should definitely participate in Denmark's liberalised market. They could not only gather valuable experience but also present themselves as trustworthy partners for gambling operations throughout all of Scandinavia.

Content of report

The report includes detailed analyses of all relevant topics:

- **Unique overview of the liberalisation process and content of the draft law** - Although the current draft law liberalising the gambling market is still confidential, MECN and the Danish law firm Horten are able to offer the reader unique insights into key details of the draft law.
- **Analyses of all sectors** - The report offers an analysis of all sectors of the gambling market: interactive/online gambling, betting, lottery, gambling machines, and casinos.
- **Current market figures** - The report includes comprehensive market data up to 2008, such as market size and development of sales/turnover as well as gross revenues, registered users, ...
- **Legal/regulatory and tax information** - The report provides detailed explanations of the current legislation and the taxes imposed – it was produced in cooperation with the leading legal experts of the Danish law firm Horten.
- In total, the report has **48 pages and 24 graphics/exhibits**.

Table of contents

1	Introduction – Denmark, paving the way for Scandinavia?	4
2	Key demographic and economic figures	5
3	Overview of the Danish gambling market	6
3.1	Structure and market size	6
3.2	Legal framework	8
3.3	The tax regime for gambling activities in Denmark	9

4	Liberalisation ahead - unique details and analysis	11
4.1	Key elements of the liberalisation	11
4.2	The reaction of the European Commission	12
5	The Danish interactive gambling market	13
5.1	History and development	13
5.2	Legal situation in the interactive gambling market	13
5.2.1	Legal framework	13
5.2.2	Ladbrokes vs. the Danish state	13
5.2.3	The European Commission vs. state monopoly	15
5.2.4	Other relevant legal cases	16
5.3	Market size and key figures	17
5.4	Internet gambling heavyweights targeting the Danish market	19
5.5	Danske Spil's interactive offerings	20
6	The Danish lottery market	24
6.1	History and development	24
6.2	Legal framework	24
6.3	Market size and key figures	25
6.4	Retail channels	27
7	Denmark's betting market	29
7.1	History and development	29
7.2	Legal framework	29
7.3	Betting products offered	29
7.4	Market size and key figures	30
7.5	Retail channels	32
8	Denmark's casino market	33
8.1	History and development	33
8.2	Legal framework	33
8.3	Market size and key figures	33
8.4	Overview of casinos in Denmark – foreign private operators dominate	35
9	Poker in Denmark	37
9.1	The status of poker	37
9.2	Increased liberalisation of poker to come?	37
9.3	A snapshot of poker clubs	38
10	Denmark's gambling machine market	40
10.1	History and development	40
10.2	Legal framework	40
10.3	Market size and key figures	40
11	Key market players	43
11.1	Danske Spil Group	43
11.2	Det Danske Klasselotteri	45
12	Methodology	46
13	List of exhibits	47
14	About authors and contact	48

List of exhibits

Exhibit 1: Core sectors of the Danish gambling market.....6

Exhibit 2: Development and breakdown of the Danish gambling market (turnover/sales) - 2005 to 20087

Exhibit 3: Development and breakdown of the Danish gambling market (gross revenue) - 2005 to 20087

Exhibit 4: Ladbrokes' billboard in Copenhagen14

Exhibit 5: Interactive turnover/sales of Danske Spil - 2005 to 200818

Exhibit 6: Registered user and sales per user of Danske Spil - 2005 to 200818

Exhibit 7: Localised offerings of online gambling operators for the Danish market.....19

Exhibit 8: Online advertising of online gambling operators on Danish sports sites20

Exhibit 9: Mobile gambling offer of Danske Spil21

Exhibit 10: Lottery subscription via Internet22

Exhibit 11: Danske Spil's development of lottery subscription via the Internet/PBS - 2005 to 200822

Exhibit 12: Development and breakdown of the Danish lottery market (turnover/sales) - 2005 to 200826

Exhibit 13: Development and breakdown of the Danish lottery market (gross revenue) - 2005 to 200827

Exhibit 14: Examples of lottery retailers.....27

Exhibit 15: Development and breakdown of Danish betting market (turnover/sales) - 2005 to 200830

Exhibit 16: Development and breakdown of Danish licensed sports betting market (turnover/sales) - 2005 to 200831

Exhibit 17: Development of casino gross gambling revenue in Denmark - 2005 to 200834

Exhibit 18: Overview of Danish casinos – no. of tables, slot machines, and ownership34

Exhibit 19: Examples of Danish casinos35

Exhibit 20: Example of Danish poker club39

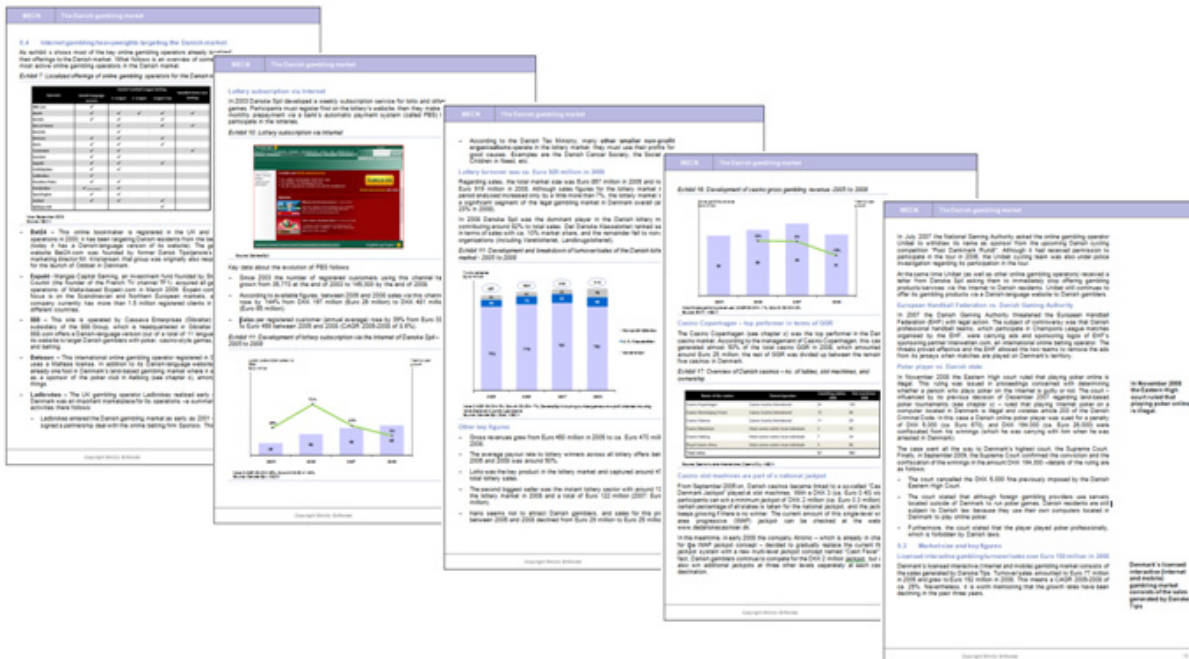
Exhibit 21: Development and breakdown of the number of gambling machines in Denmark - 2005 to 200841

Exhibit 22: Development and breakdown of turnover of Danish gambling machine market - 2005 to 200841

Exhibit 23: Development of gross revenues of Danish gambling machine market - 2005 to 200842

Exhibit 24: Development of Danske Spil retailers - 2005 to 200843

Sample pages of report



Companies mentioned in this report

888.com	Danish Amusement Machine Industry Association (DAB)	Ladbrokes
Aalborg Pokerklub	Danish Cancer Society	Landbrugslotteriet
Bet24	Danish Gymnastics and Sports Associations	Mangas Capital Gaming
Bet365	Danish Poker Association	National Football League
Betfair Poker	Danish Sport Association	PokerStars
Betsson	Dansk Automatspil	Pollard Banknote
Betware	Danske Spil	Rat Pack Poker
Bold.dk	Det Danske Klasselotteri	Royal Casino Aarhus
Bwin	Ekstrabladet	SKAT
Casino Aalborg	Elite Gaming	Society for Children in Need
Casino Copenhagen	Enetpulse	Spn.dk (Jyllands Posten)
Casino Marienlyst	European Handball Federation	Sponso
Casino Munkebjerg Forest	Expekt	Tipsbladet.dk
Casino Odense	GTech	Unibet
Casinos Austria International	Haderslev Pokerklub	Varelotteriet
Centrebet	Horesta	
Dan Toto	Jyllingevej Poker Club	

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