Europe Online Gambling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 115 pages | Mordor Intelligence

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Report description:

Europe Online Gambling Market Analysis

The Europe online gambling market is expected to grow from USD 47.21 billion in 2025 to USD 50.19 billion in 2026 and is forecast to reach USD 68.19 billion by 2031 at 6.32% CAGR over 2026-2031. Smartphones dominate the market due to their convenience and widespread use. Casino game innovations are closing the gap with other popular categories. Younger, tech-savvy individuals are driving market demand through their preference for digital platforms. Artificial intelligence enhances user experiences with personalized recommendations and improved responsible gambling measures. Sports betting remains the most popular segment, supported by major tournaments and in-play wagering. Regulatory changes, such as Italy's reforms and anticipated gambling law liberalization in France, create opportunities for operators adapting to diverse compliance needs. The European online gambling market is moderately competitive, with the top ten operators accounting for less than half of the total revenue, leaving room for smaller players to grow.

Europe Online Gambling Market Trends and Insights

5G and smartphones fuel the market

Europe's online gambling market is growing rapidly, driven by smartphone adoption and 5G networks. In 2024, 94% of European households had internet access, according to the European Union . Operators like Bet365, LeoVegas, and Unibet are focusing on mobile-friendly platforms to attract users. Progressive web apps (PWAs) are gaining popularity, allowing users to access gambling sites via browsers, bypassing app-store restrictions. The rollout of 5G has enhanced mobile gaming with better live streaming, faster response times, and real-time interactions. By the end of 2024, 5G adoption in Europe grew by 87%, as per Connect Europe . Platforms like Bwin have leveraged this to introduce live leaderboards, multiplayer betting rooms, and chat integrations, appealing to younger, experience-focused users. These advancements enable features like voice-activated betting and interactive chat rooms, making the experience more engaging.

Technological advancements and immersive gaming enhance user experience

Europe's online gambling market is growing rapidly, driven by technological advancements and a rising gamer base. Companies like Entain and Flutter Entertainment use AI to customize odds, promotions, and risk alerts, boosting engagement and ensuring responsible gambling. Virtual reality (VR) is reshaping the market with live-casino experiences that mimic physical casinos, appealing to tech-savvy younger users. Blockchain ensures transparent transactions, building trust in regions with strict regulations. Cloud-based systems enable operators to expand across countries and support cross-border liquidity pooling for pan-European operations. Millennials and Gen Z are increasingly drawn to features like missions, leaderboards, and social interactions, aligning with their gaming habits.

High taxation reduces operator profitability

Europe's online gambling market grapples with high taxation on stakes and gross gaming revenue (GGR), a challenge that weighs heavily on smaller and mid-sized operators. Take Germany, for instance: a 5.3% tax on stakes has drawn criticism for dampening the competitiveness of odds, particularly affecting the allure of online slots and poker. Over in Sweden, a hefty 22% GGR tax is squeezing operators' profit margins, pushing some to scale back marketing or exit the scene altogether. France's tax reforms loom large, with projections indicating a EUR 45 million hit to FDJ's earnings in 2025, underscoring the tangible impact of tax policies, even on industry giants. Italy's licensing landscape poses its own hurdles: a EUR 7 million fee for a nine-year license, coupled with other revenue-based taxes, sets a daunting barrier for newcomers . Such challenges often leave smaller operators gasping for breath, paving the way for market consolidation as larger entities either absorb them or push them out.

Other drivers and restraints analyzed in the detailed report include:

National and regional tournaments boost betting activityIntegration of artificial intelligence and virtual reality enhances overall user experienceConsumer protection and responsible gambling concerns

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Sports betting continues to dominate as the largest revenue contributor in 2025, with a share of 53.62%, but casino games like roulette, blackjack, and baccarat are rapidly gaining popularity. These games, streamed from professional studios in locations such as Riga and Malta, offer an immersive experience that attracts more players. Casino operators are increasingly collaborating with content studios to create branded tables, while cross-border jackpots significantly boost prize pools, making these games even more appealing. The market for casino games in Europe is expected to grow steadily, with the live-casino segment alone projected to achieve a robust CAGR of 7.78% during the forecast period.

Slot games remain a favorite among players due to their engaging graphics and the allure of multi-currency progressive jackpots. Meanwhile, virtual poker rooms are focusing on building loyal communities by offering shared liquidity pools across countries like Spain, France, and Portugal, enhancing the gaming experience. The digitalization of lotteries is gaining momentum, helping state governments generate revenue while competing with private platforms that provide innovative features like syndicate play.

Innovations such as syndicate play, instant draws, and app-based ticketing are helping lotteries stay relevant while driving revenue for governments. These trends highlight the evolving preferences of players and the efforts of operators to adapt to changing market dynamics.

In 2025, mobile devices contributed to 58.74% of the revenue in the online gambling market and are growing at the fastest rate, with a CAGR of 8.18%. Features like one-hand gameplay, integrated in-app wallets, and biometric login have made mobile gaming more user-friendly and accessible. While desktop platforms still attract high-volume players who prefer advanced tools like multi-screen options and detailed analytics, their market share is gradually shrinking. Operators are also experimenting with new platforms, such as smart TVs and gaming consoles, to reach a broader audience. Virtual reality (VR) headsets are beginning to offer immersive casino experiences, but this technology is still in its early stages and appeals to a smaller group of users.

Cross-platform cloud profiles are becoming increasingly popular, allowing players to switch between devices without losing their progress, which enhances the overall gaming experience. This seamless transition across devices is helping operators build stronger customer loyalty. As mobile gaming continues to dominate, marketing strategies are shifting to focus more on app-store optimization and partnerships with influencers, especially through short-form video content. Combined, these innovations in technology and marketing are positioning mobile devices as the central hub for online gambling, reshaping how operators attract, engage, and retain their player base.

The Europe Online Gambling Market Report is Segmented by Game Type (Sports Betting, Casino, and More), Device (Desktop, Mobile and Others), Age Group (Below 25 Years, 25-40 Years and More), Gender (Male and Female), and Geography (United Kingdom, Germany, France, Spain, Italy, Sweden and Rest of Europe). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Bet365 Group Ltd Flutter Entertainment PLC Entain PLC Kindred Group PLC Evoke PLC Betsson AB LeoVegas Mobile Gaming Group Tipico Co. Ltd Super Group Bragg Gaming Group Bally's Corporation Company Kaizen Gaming OPAP S.A. Zeal Network SE Hero Gaming Ltd 888 Holdings Mystake PlayOJO Spin Casino SpinArena

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

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