Development of the Gambling Market in the Czech Republic in 2018 and 2019

The data below is based on the published tax assessment of gambling operators in the Czech Republic by public authorities, and it is possible that the tax assessed could have changed very slightly in the framework of e.g. administrative proceedings after the publication of this data or could slightly change on the basis of currently conducted administrative proceedings.

In all gambling games operations in the Czech Republic, there was an **increase of 16.6% compared to 2018** in terms of the assessed tax that is calculated from the GGR, while the absolute figure is about CZK 1.49 billion. It may seem that this is a relatively good growth of the market; however, **it is still a decrease of about 13.2% compared to 2017,** which in absolute figure terms is a decrease of about CZK 2.27 billion.

Below we state the development of individual segments according to the types of gambling games operated in accordance with Act No. 186/2016 Coll., On Gambling.

Technical Gambling Game (LB and Online)

The complete segment (LB as well as online) of technical gambling operators achieved in 2019 a relatively interesting increase of around 20.7% compared to 2018; however, it's still a decrease in the amount of about 26.6% compared to 2017.

Especially the method of operating a technical gambling online seems to be interesting, as this method of operating such game shows an increase in absolute numbers (an increase of about 41.6% GGR in 2019 compared to 2018) as well as in its proportion to traditional land-based method each year.

In 2017, the online vs land-based ratio was 8.2%, 13.1% in 2018 and 15.8% in 2019 when the market shows steady growth in this respect.

Fixed-odds Betting

The complete segment (LB as well as online) of the fixed-odds betting operators showed an increase of approximately 17% in 2019 compared to 2018, and an increase of 19.2% compared to 2017.

For fixed-odds betting, the prevailing method of operation is fundamentally the online operation, with 83.4% in 2017, 84.34% in 2018, 87.53% in 2019.

Lottery

The complete segment (LB as well as online) of lottery operators recorded an increase of about 8% in 2019 compared to 2018, and of about 23% in the ratio of 2019 to 2017.

Within the lotteries operated, the ratio of the online method to the land-based one was 6.4%, 10% in 2018, 13.7 % in 2019 where even in this relatively specific segment there is a steady increase in the online operation in terms of both traditional land-based method as well absolute figures (compared to 2017, GGRs increased by 162% in 2019)

Live Game

Within the complete live gambling operation segment, there was virtually no difference in 2019 relative to 2018, which is about 0.2%, but compared to 2017, this represents an increase of 8.3%.

The online method of live gambling operation also saw a steady growth of 5.6% in 2017, 7.7% in 2018 and 9.8% in 2019.

Bingo

Bingo as a kind of gambling game is not very popular game in the Czech Republic, but for the sake of completeness of this material, we state this type of gambling as well.

In 2019, the complete segment of bingo operators grew by 5.1% compared to 2018, and by 1%. compared to 2017.

Bingo as a kind of gambling game is not operated in the online method in the Czech Republic.

Totalizer

Totalizer as a kind of gambling game is also not very popular in the Czech Republic.

The complete segment of totalizator gambling operators recorded a decrease of 46.8% in 2019 compared to 2018 and 13.8% compared to 2017. In the development of the market, year 2018 appears to be abnormal as the market increased by a significant 62% compared to 2017 but decreased by reported 46.8% the following year.