

Svenska Spel's games

Svenska Spel offers a broad gaming range: sports betting, number games, lotteries, gaming on Vegas VLTs, casino gaming and poker on svenskaspel.se. All games are subject to a minimum age limit of 18 for the purchase of Svenska Spel's products and receipt of winnings, except for casinos for which the age limit is 20.

The Group's total net gaming revenue for 2011 was SEK 9,687 million (9,624), up SEK 63 million (0.7%) compared with 2010.

Sports betting

Sports-based gaming consists of Oddset and the football-based Stryktipset, Europatipset, Måltipset and Topptipset. They can be played at retailers, on svenskaspel.se and to some extent via mobile phone. This gaming category has been hit hardest by competition from foreign Internet-based gaming companies.

Net gaming revenue for sports gaming in 2011 totalled SEK 1,456 million (1 440) and accounts for about 15% (15) of Svenska Spel's total net gaming revenue.

Oddset

The 25 year-old Oddset is market leader in the sports betting market. Oddset is an all-encompassing name for such games as Lången, Matchen, Bomben, Mixen and Powerplay. The player can bet on fixed odds (which apply from the start of the match to the end result), moving odds (that change as the stakes flow in) and also on live gaming where the odds are set during the progress of the match. Match objects are drawn from a variety of sports, but primarily football and ice hockey.

Overall net gaming revenue from Oddset in 2011 increased 2.9% from the previous year. Certain sections of the Oddset

family have a relatively low market share as result of competition from foreign-based Internet gaming companies who can occasionally offer players higher winnings and bonuses. This means that Oddset has a lower market share in specific segments, such as the fixed-odds market and live gaming.

In 2011, betting on the handball World Cup, the women's football World Cup and the qualifying matches for the European Cup in football in 2012 contributed to revenue. Basketball-based gaming was reintroduced to the selection during the year. The past two years have seen a revival of interest in basketball among the public and the media, thanks largely to the live broadcast of several matches.

Football pools

After the increase of the reimbursement for the Stryktipset and Europatipset football pools, many customers and retailers requested larger and more playable mathematical systems. Consequently, the limit for the total number of rows was extended from 9,216 to 41,472 rows in May 2011. Meanwhile, the customer service was improved, with more time available for the submission of coupons.

Since 2010, when a winner with 13 correct on Stryktipset was guaranteed SEK 10 million, the number of football pools millionaires has increased. A total of 18 million-winnings were paid out on Stryktipset during 2011, with a record win of SEK 20 million going to a lucky enthusiast in Malmö.





Oddset turned 25

In the mid-1980s, gaming companies in France and the US introduced new online technology (direct links between retailer terminals and the gaming company's central computer) at retailers. In particular, the technology was ideal for random number games such as Lotto; in Sweden, however, bookmaking paved the way for its application.

1986

Oddset – which was launched with the Längan, Matchen and Toppen gaming forms – was introduced on 27 October 1986. This was the world's first online bookmaking and it also attracted considerable international interest. This was arranged with the approval of the Government during a trial period of 15 months. Initially, the online terminals were placed with 340 major retailers in the Stockholm, Gothenburg and Malmö regions. Age limit of 18 applied to Oddset from the start.

1988

Oddset was an immediate success and its popularity grew. Hitherto, sports games had been limited to the football pools and ATG's horse racing. Oddset offered players a broader range of sports. The only exception to the sports offering was the introduction of the European Song Contest as a gaming object on the Toppen game form.

1992

The online technology spread to an increasing number of retailers nationwide and the now permanent Oddset gained rapidly in popularity.

1998

Oddset sales exceeded those of the Stryktipset football pools, hereby becoming Svenska Spel's largest sports game. By this stage, the Swedish Oddset-model was being used in 12 other countries.

1999

Foreign-based Internet companies entered the Swedish gaming market as competitors to Oddset.

2000

Svenska Spel's proprietary gaming site, svenskaspel.se, was ready for launching gaming on Längan.

2001

The Oddset family was extended with the addition of the Bomben gaming form at retailers and on svenskaspel.se.

2003

Oddset attained its highest net gaming revenue to date, reaching some SEK 700 million.

2004

The Mixen gaming form was first introduced on svenskaspel.se in 2002, and at retailers in 2004.

2006

Oddset's 20th anniversary in 2006 coincided with the first opportunity for players to place stakes on three ice-hockey matches on the Bomben game form.

2007

Oddset Live was launched.

2009

Oddset Powerplay was introduced.

2011

The Oddset success story continues to show its strength after 25 years, despite growing competition arising from new sales channels created by new technology. At retailers, ATG's horseracing and Svenska Spel's sports gaming continue to jostle for gaming space, but the major growth has been on the Internet. Mobile phone-based gaming is the new distribution channel in the wake of the Internet. 2011 saw all-time high odds of 2,660,634 on Bomben. A few lucky players shared the winnings, which amounted to a similar total in SEK.



Vad tror du?



Plötsligt har det hänt i 25 år.

Triss turned 25

The prototype for what came to be Sweden's most popular lottery ticket was the American scratch lotteries, which were frequently one-off lotteries with a new appearance from time to time. As opposed to the US model, Swedish Triss was to become a recurrent lottery with a permanent appearance.

1986

Penninglotteriet launched Triss on 29 September 1986. The ticket price was SEK 20 and the maximum winnings SEK 100,000. Success was immediate. The edition sold to retailers was limited and quickly sold out. The tickets arrived on the 10th of each month and long queues stretched outside the appointed outlet retailers.

1992

The ticket price was raised to SEK 25.

1994

Triss sales jumped when the TV screen icon was introduced, which enabled potential winners to scratch winnings ranging from SEK 50,000 to 5,000,000. The premier took place during the relatively new programme "News Morning" on Swedish TV 4 on 21 March 1994. Already during the first scratch session, the winner won the maximum SEK 5 million prize. As a result, Sweden became the first country worldwide to show scratch lotteries live on TV.

1997

17 October 1997 marked the introduction of Triss Månadsklöver, a new prize category on the Triss tickets with a final scratch directly broadcast on TV4. The winner scratched forth a monthly prize of SEK 10,000 to 25,000, which is paid out over a period of between 10 and 25 years. Månadsklöver almost doubled Triss sales.

2001

The maximum winnings available directly on the scratch surface were raised to SEK 1,000,000 in February 2001.

2002

The excitement-raiser known as the "multiplying winnings" – permitting the player to gain a twofold or tenfold increase of the total scratched win – was added to Triss.

2003

The launch of a variant of Triss: DubbelTriss, through which, by paying a double ticket price, you can win in two scratch tickets or both tickets combined.

2006

In conjunction with the 20th anniversary in August 2006, the new Luxurious Anniversary Package – a SEK 250 ticket – was launched, which offered the best chance ever scooping winnings of SEK 1 million. The 1,000th Triss millionaire was Tommy Essenholm, who scratched his Månadsklöver on a gigantic ticket on Kungsgatan in Stockholm on Saturday 2 September 2006. The winnings were SEK 15,000 per month for 20 years.

2007

A special Triss Association ticket was launched in cooperation with the non-profit associations. The maximum prize for Månadsklöver was increased to 50,000 kronor per month for 25 years.

2010

An age limit of 18 was introduced on 1 October 2010 for the purchase of tickets or receipt of winnings for all Svenska Spel's lotteries.

2011

In terms of net gaming revenue, Triss is Sweden's fourth largest game. After 25 years, Triss is still on top in terms of public popularity with its annual customer base of more than 4 million ticket buyers.

2011 saw the launch of Stryktipset, Europatipset and Topptipset in Svenska Spel's mobile web, which was well received by the customers.

Players' positive response to the increased reimbursement is reflected in the gross gaming revenue for football pools, which rose almost 20%.

However, net gaming revenue for Stryktipset and Måltipset has declined slightly, Europatipset and Topptipset display continuing growth.

Number games

Svenska Spel's lucky number games are Lotto, Keno, Joker, Viking Lotto and the Internet games Bingo and Pick'n'Click. The first three can be played at retailers as well as on svenskaspel.se. Viking Lotto is only available in-store, while Bingo and Pick'n'Click are only available on svenskaspel.se. Lotto and Joker are also sold via subscription and via mobile phone.

Number games represent the largest gaming category, with net gaming revenue in 2011 amounting to SEK 2,892 million (2,879). They account for some 30% (30) of Svenska Spel's total net gaming revenue.

In terms of net gaming revenue, Lotto is Sweden's fifth single largest gaming form after Vegas, PostkodLotteriet, V75 and Triss. Lotto increased by 1.0% in 2011.

The supplementary Joker game is valuable on the Lotto and football pools coupons. In 2011, the Joker net gaming revenue increased 3.4%.

Keno is Svenska Spel's second largest number game. In 2011, net gaming revenue dipped 3.0% from the preceding year. During the year, the offering was enhanced in the form of four ready-made games – Keno 30, Keno 60, Keno 120 and Keno 240, making it easier for customers and retailers alike.

Viking Lotto is a joint venture among gaming companies in Sweden, Norway, Finland, Denmark, Iceland and Estonia. It is a minor game in Sweden with a declining trend, but is progressing better in some of the other countries.

Svenska Spel's own Internet games on svenskaspel.se, Bingo and Pick'n'Click, reported net gaming revenue of a total of SEK 126 million (125) in 2011. Bingo saw a trend reversal, with a rising market share and more customers.

Lotteries

Svenska Spel's lotteries are Triss (with the DubbelTriss and GuldTriss variations), Tia (several variations), Penning and the Skrap-Spel scratch range consisting of Skrap-Pyramid, Skrap-Kryss and Skrap-Bingo, and the newcomer in 2011 Skrap-Stjärna, in addition to temporary campaign lotteries. The offering also includes Lottpaketet, a pre-packaged set of lottery tickets.

Lotteries can be purchased at retailers and on svenskaspel.se. Triss and Tia can also be purchased via mobile phones. Svenska Spel also provides a subscription service for Triss.

Lotteries have come under increased competition, notably from PostkodLotteriet, but also from the sale of lottery tickets by NGOs and Internet-based lottery sales. Net gaming revenue for lotteries declined slightly in 2011 to SEK 1,838 million (1,846), accounting for some 19% (19) of Svenska Spel's total net gaming revenue.

By far the biggest lottery is the 25-year old Triss in terms of net gaming revenue, number of customers, recognition and popularity. No other game has such high acceptance; Svenska Spel's 2011 survey indicated that about 4.4 million Swedes purchased Triss during the year. Net gaming revenues in 2011 totalled SEK 1,640 million (1,621). Penning, Tia and Lottpaketet show a negative trend at a substantially lower level, while Skrap-Spel gained a positive response with the launch of Skrap-Stjärna.



Triss Gift Code

is an innovative new feature introduced in 2011 that facilitates for customers to give Triss lottery tickets as gifts. Read more on page 39.

Svenska Spel's games, net gaming revenue and sales channels

MSEK	Net gaming revenue		Restaurants and bingo halls	Casinos	Retailers	Associations (arena gaming)	Internet	Mobile	Subscrip- tion
	2011	2010							
Sports games									
Oddset	813	790			●	●	●	●	
Stryktipset ¹	310	324			●	●	●	●	
Europatipset ¹	140	128			●	●	●	●	
Måltipset	100	110			●	●	●		
Topptipset	92	87			●	●	●	●	
Number games									
Lotto	1,625	1,610			●	●	●	●	●
Keno and KenoXpress	585	603			●	●	●		
Joker	513	496			●	●	●	●	●
Viking Lotto	43	45			●	●			
Bingo and Pick'n'Click on svenskaspel.se	126	125					●		
Lotteries									
Triss	1,640	1,621			●	●	●		●
Tia	65	88			●	●	●		
Skrap-Spel	104	99			●	●	●		●
Penninglotten	8	9			●	●			
Lottpaketet	21	29			●	●			
VLTs									
Vegas	2,083	2,039	●						
Casino games									
	1,203	1,190		●					
Poker									
Poker on svenskaspel.se	214	231					●		
Live poker ²				●					
Total	9,687	9,624							

1. Net gaming revenue for 2010 included Dubbelvinsten (Double winnings) feature, which was discontinued in August 2010.

2. Included in casino games.

As the amounts have been rounded off, the totals do not always tally.



Vegas

Vegas is a VLT (video lottery terminal) that includes a range of games, such as wheel games with various themes, video poker and Keno. The maximum stake for Vegas gaming is SEK 5 and the highest winnings SEK 500. 2011 marked the 15th year of operations for Vegas, which is Sweden's largest gaming form.

Vegas net gaming revenue increased to SEK 2,083 million (2,039), representing 22% (21) of Svenska Spel's total net gaming revenue.

Svenska Spel has a monopoly on VLTs in Sweden. Vegas VLTs are located only in selected restaurants with an alcohol license or in bingo halls with bingo licences. A gaming location may not have more than five Vegas VLTs and their revenue must not dominate the business.

The total number of VLTs that Svenska Spel can install nationwide is restricted to 7,500. As Vegas is considered to be one of the games most likely to create gaming problems, it is encompassed by many restrictions and requirements. Responsible gaming has a high priority and the aim is to train all employees and Vegas business partners in responsible gaming, and test purchases are conducted annually to ensure that age controls are upheld. A number of employees charged with receiving calls from problem players and relatives of problem players were specially trained in handling difficult calls. The game is sparsely marketed and players must verify their age before they commence playing.

During 2011, an agreement was signed for the purchase of responsible gaming tools, based on the Spelkortet customer card, which will also be available for Vegas customers. Tests will commence at year-end 2012 and the tools are expected to be available for all Vegas customers by summer 2013.

Casino games

Casino Cosmopol celebrated its 10th anniversary in 2011. 2001 saw the opening of the international casinos in Sundsvall and Malmö, while the Gothenburg casino opened in 2002 and the Stockholm casino in 2003. The casinos offer table games (roulette, dice and card games) and slot machines.

Gaming machines in Sweden

A Supreme Court decision confirmed that only Svenska Spel's VLTs are to be available in the Swedish market. Thus, gaming machines located in Sweden but linked to servers abroad are prohibited.

Casino games net gaming revenue in 2011 amounted to SEK 1,203 million (1,190), accounting for some 12% (12) of Svenska Spel's total net gaming revenue.

High priority is assigned to responsible gaming and security at the casinos. Gaming and responsible gaming information is displayed throughout the premises, as well as on multimedia screens. Personnel have training in matters relating to gaming problems. The marketing of the casinos is limited. Campaigns are run to promote the overall casino concept with gaming, restaurants and entertainment in centrally located, culture-historical buildings.

Casino Cosmopol has exclusive rights to international casinos in Sweden, but foreign-based Internet companies provide casino games on Internet.

Poker

Svenska Spel offers poker on svenskaspel.se and at the casinos. Net revenue in 2011 for Internet-based poker declined to SEK 214 million (231), representing some 2% (2) of Svenska Spel's total net gaming revenue. Svenska Spel's market share for Internet poker rose to 34% (33).

Net gaming revenue from poker at the casinos is included in the total net gaming revenue for casino gaming. Interest in poker at the casinos is high. Casino Cosmopol arranges poker tournaments, such as the popular Swedish Poker Championship, and cash games. ■