GAMBLING COMMISSION

Gambling Industry Statistics

April 2015 to March 2020

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Executive Summary

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Industry Statistics report on the size and shape of the gambling industry in Great Britain.

This report provides an overview of Gross Gambling Yield (GGY) by sector, along with the numbers of licensed operators and premises. It is based on data reported to us by the operators we licence and regulate.

Please note the following:
A change in regulations reducing maximum stakes from £100 to £2 for Category B2 machines took effect in April 2019. This publication includes the first financial year of data submitted since the change of regulations.

Land based sections of the industry were forced to stop trading due to Covid-19 restrictions from March 20th 2020, Thus affecting the last 11 days of this reporting period. This restriction also affected live sporting events which would have potential to impact on remote operators also.

An accompanying data file located on the Industry Statistics web page has more detail, including historical data back to 2009.

Total GGY for the industry was £14.2bn in the year April 2019 to March 2020. This represents a marginal decrease of 0.6% on the previous reporting period.

Remote gambling is the largest combined sector by GGY. With an increase in GGY of 8.1% to £5.7bn GGY, it comprises 39.9% of the overall market.

National Lottery ticket sales increased by 9.7% to £7.9bn. This supported a GGY equivalent increase of 10.4%, to £3.4bn, making the National Lottery the second largest sector by GGY. Over the same period, the primary contribution to good causes increased by 11.6% to £1.7bn. For more information on National Lottery sales, please see our returns to good causes report.

Non-remote betting is the third largest sector by GGY, and saw a decrease of 26.4% to £2.4bn. GGY for off-course, on-course and pool betting all decreased. Within off-course data, machines GGY decreased by 41.2%.

Lotteries saw a GGY equivalent increase to £611.6m (13.3%), with balance to good causes at £366.8m, a 10.7% increase from the last reporting period. This is the highest contribution figure reported to date.

In the arcades sector, adult gaming centres showed an increase of 9.3% in GGY, reporting £424.8m. GGY for licensed family entertainment centres also increased (5.3%), reporting £52.4m.

Non-remote casino and non-remote bingo both show a steady decline with no significant changes.

Machines GGY over the year to March 2020 across all sectors decreased by 25.6%. Across all sectors, GGY from Category B2 machines decreased by 99.0% to £12.1m. B3 is now the highest machine category for GGY, increasing by 39.5% to £1.5bn.

The number of licensed activities has decreased to 3,528 (-3.5%). These licences are held by 2,576 operators (-4.2%).

The overall number of licensed gambling premises in Great Britain has fallen by 6.4% to 10,098. The majority of these were betting premises which declined by 7.7%.

This publication is primarily for anyone who has an involvement or interest in the gambling industry including government, licensed operators, trade bodies, international regulators, journalists, academic researchers, financial institutions, statisticians, consumers and local authorities.
Please visit our website for an explanation of GGY and other terms used in this summary report and for information on how we prepare our statistics.

Gambling Industry Overview

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Gross gambling yield

During the period April 2019 to Mar 2020, the regulated gambling industry in Great Britain generated a gross gambling yield (GGY) or equivalent* of £14.2bn, a 0.6% decrease compared with the previous reporting period.

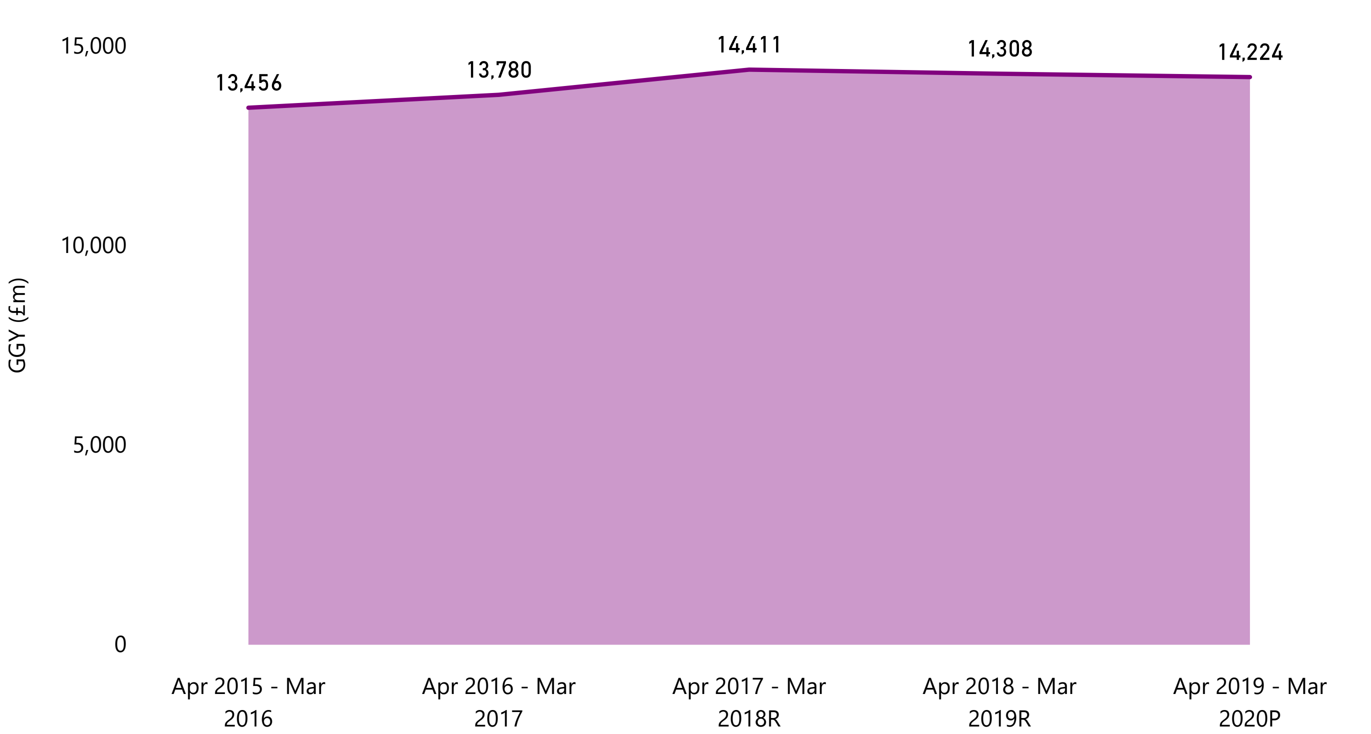
Industry GGY by sector (£m)

Sector	Apr 2016 - Mar 2017	Apr 2017 - Mar 2018R	Apr 2018 - Mar 2019R	Apr 2019 - Mar 2020P	% Change
Arcades (non-remote)	424.93	424.81	438.52	477.25	8.8%
Betting (non-remote)	3,310.84	3,268.26	3,261.91	2,402.37	-26.4%
Betting (remote)	1,952.99	2,251.61	2,017.35	2,329.73	15.5%
Bingo (non-remote)	684.28	680.01	674.38	635.95	-5.7%
Bingo (remote)	161.15	163.93	175.94	176.80	0.5%
Casino (non-remote)	1,163.54	1,180.72	1,058.82	1,016.05	-4.0%
Casino (remote)	2,661.04	2,931.13	3,061.93	3,175.04	3.7%
Lotteries* (remote and non-remote)	442.43	502.29	539.99	611.64	13.3%
The National Lottery* (remote and non-remote)	2,978.60	3,007.80	3,079.30	3,399.21	10.4%
Total	**13,779.80**	**14,410.55**	**14,308.15**	**14,224.04**	**-0.6%**

Notes:
* GGY equivalent for the National Lottery and large society lotteries is total proceeds minus total prizes. This data includes both non-remote and remote GGY.
R - Previously published data revised.
P - Provisional new data.

Gambling Industry Overview (continued)

Gambling industry GGY (£m)



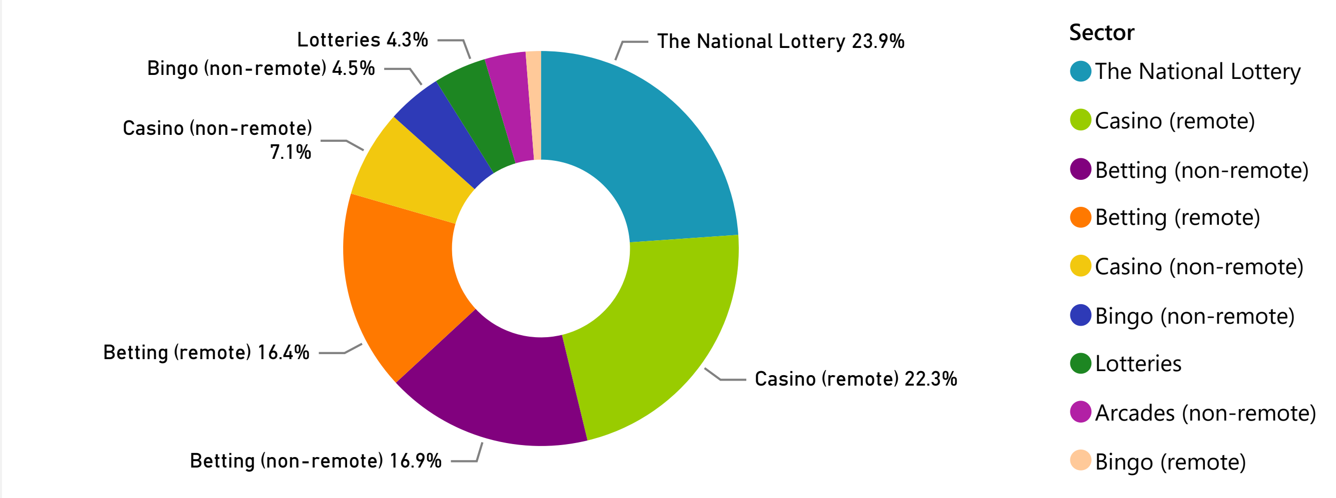
£14,224M

Industry GGY

-0.6%

Change from previous period

Gambling industry GGY by sector for latest period



Key Points:

Overall industry GGY decreased by £84.1m (-0.6%) from £14,308.2m to £14,224.0m between periods April 2018 - March 2019 and April 2019 - March 2020.

Declines by sector were seen in betting (non-remote) by £859.5m (-26.4%), casino (non-remote) by £42.8m (-4.0%) and bingo (non-remote) by £38.4m (-5.7%).

Between the same periods GGY increased in casino (remote) by £113.1m (3.7%), National Lottery (non-remote and remote) by £319.9m (10.4%), betting (remote) by £312.4m (15.5%), lotteries (non-remote and remote) by £71.6m (13.3%), bingo (remote) by £0.9m (0.5%) and arcades (non-remote) by £38.7m (8.8%).

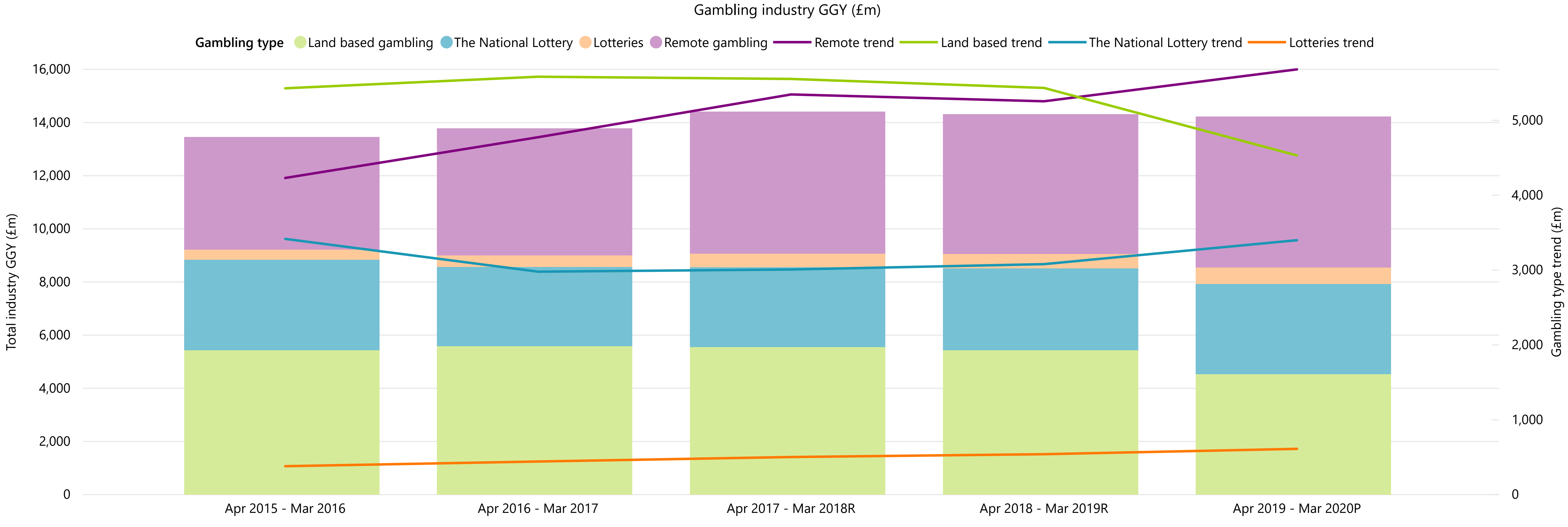
Between periods April 2015 - March 2016 and April 2019 - March 2020 industry GGY increased by £768.0m (5.7%) from £13,456.1m to £14,224.0m.

Notes:

For The National Lottery and lotteries, figures are a GGY equivalent. For lotteries, this includes any GGY equivalent raised through external lottery managers.

Sales from operators with gaming machine technical, trading rooms only and gambling software licensed activities are not included in these charts.

Gambling Industry Overview (continued)



Key Points:

Between April 2019 - March 2020, gambling industry GGY comprised of £5,681.57m (39.9%) remote gambling, £4,531.6m (31.9%) land based gambling, £3,399.2m (23.9%) National Lottery and £611.6m (4.3%) lotteries.

Between periods April 2015 - March 2016 and April 2019 - March 2020, Remote gambling increased by £1,450.8m (34.3%) from £4,230.8m to £5,681.6m, Land based gambling decreased by £897.1m (-16.5%) from £5,428.7m to £4,531.6m, The National Lottery GGY equivalent decreased by £17.6m (-0.5%) from £3,416.8m to £3,399.2m and Lotteries GGY equivalent increased by £231.9m (61.1%) from £379.8m to £611.6m.

Operators and Licensed Activities

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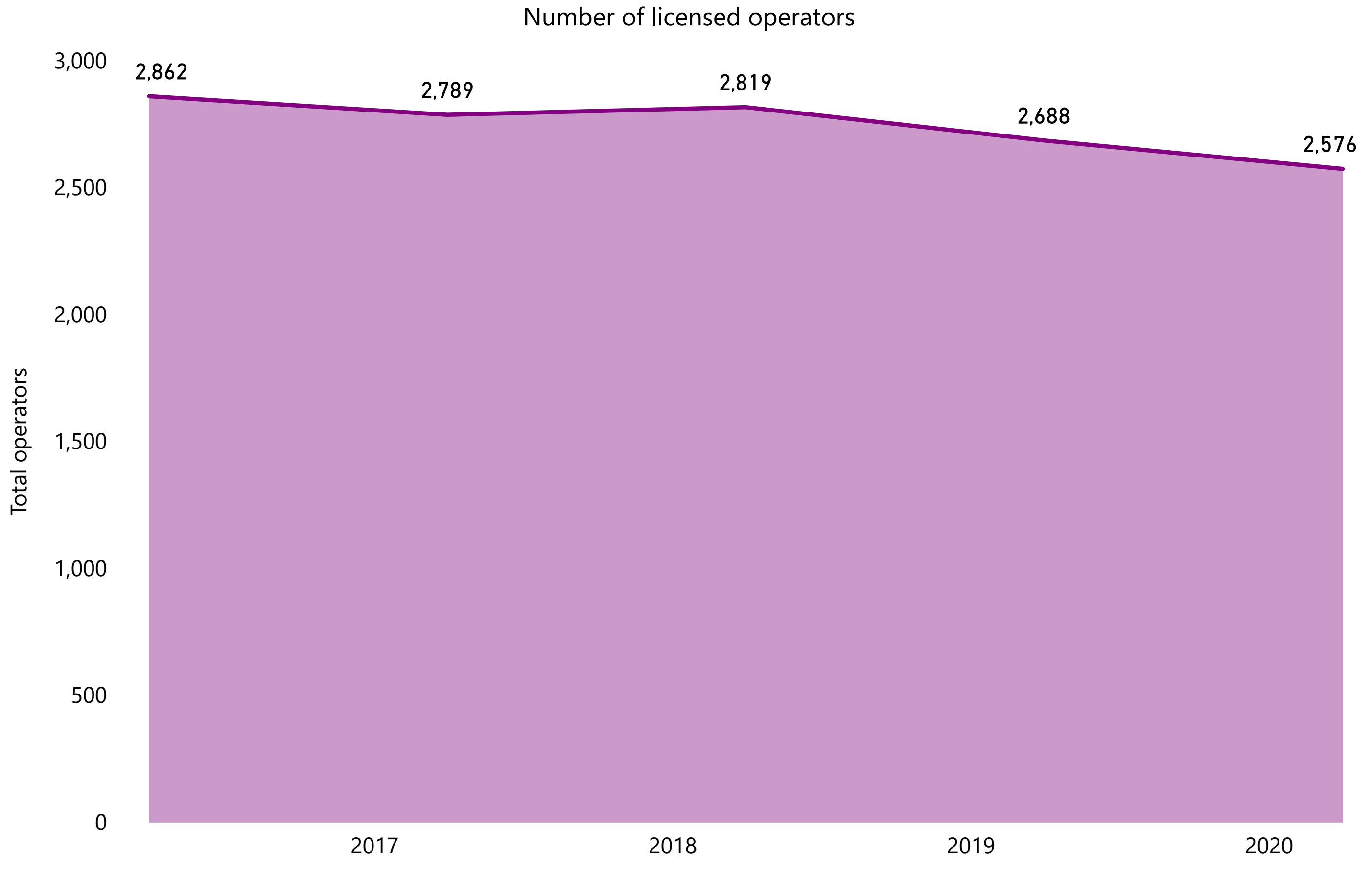
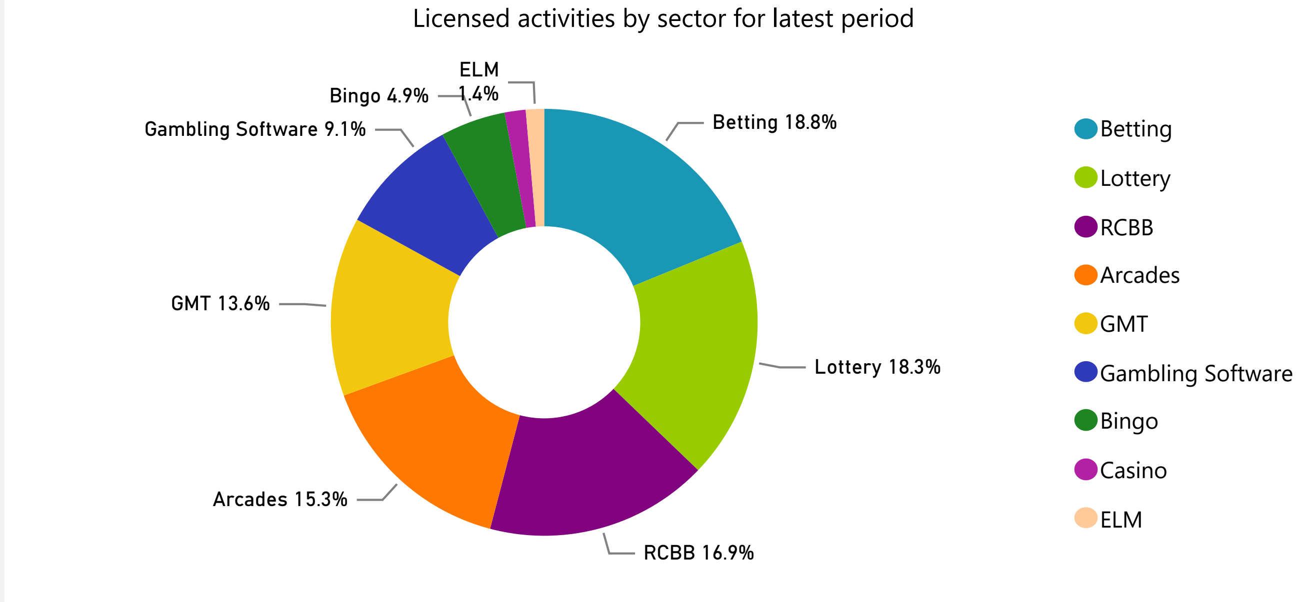


2,576
Licensed operators

-4.2%
Change from previous period



Key Points:

The total number of licensed operators decreased by 112 (-4.2%) from 2,688 to 2,576 between March 2019 and March 2020.

Between March 2016 and March 2020, the total number of licensed operators decreased by 286 (-10.0%) from 2,862 to 2,576.

Between March 2019 and March 2020, the total number of activities operators are licensed for decreased in non-remote betting by 57 (-7.9%), remote casino, betting and bingo (RCBB) by 30 (-4.8%), gaming machine technical (GMT) by 27 (-5.3%), arcades by 15 (-2.7%), non-remote bingo by 5 (-2.8%), external lottery manager (ELM) by 4 (-7.5%), and non-remote casino by 1 (-1.8%). There were increases in gambling software by 7 (2.2%) and society lotteries by 6 (0.9%).

Premises

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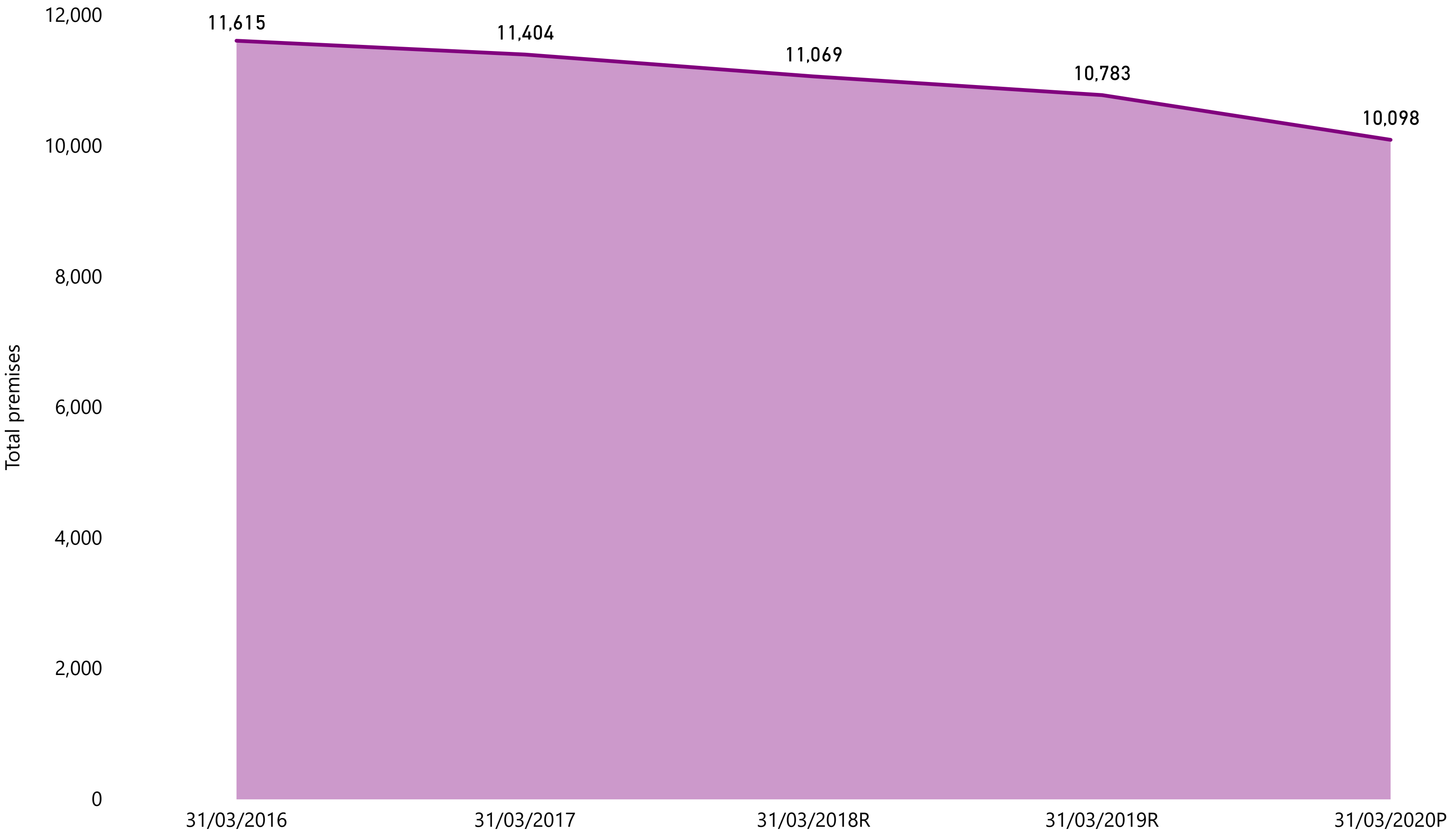
Number of premises



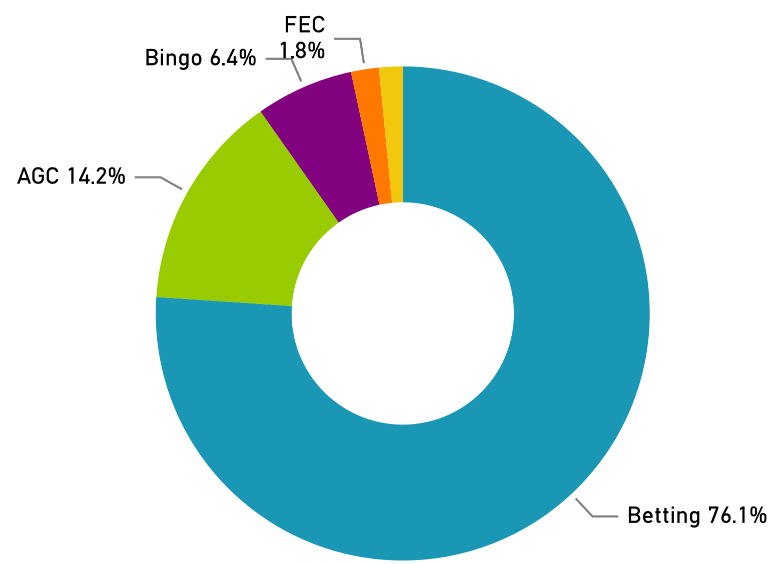
10,098

Premises

-6.4%

Change from previous period

Premises by type for latest period



Key Points:

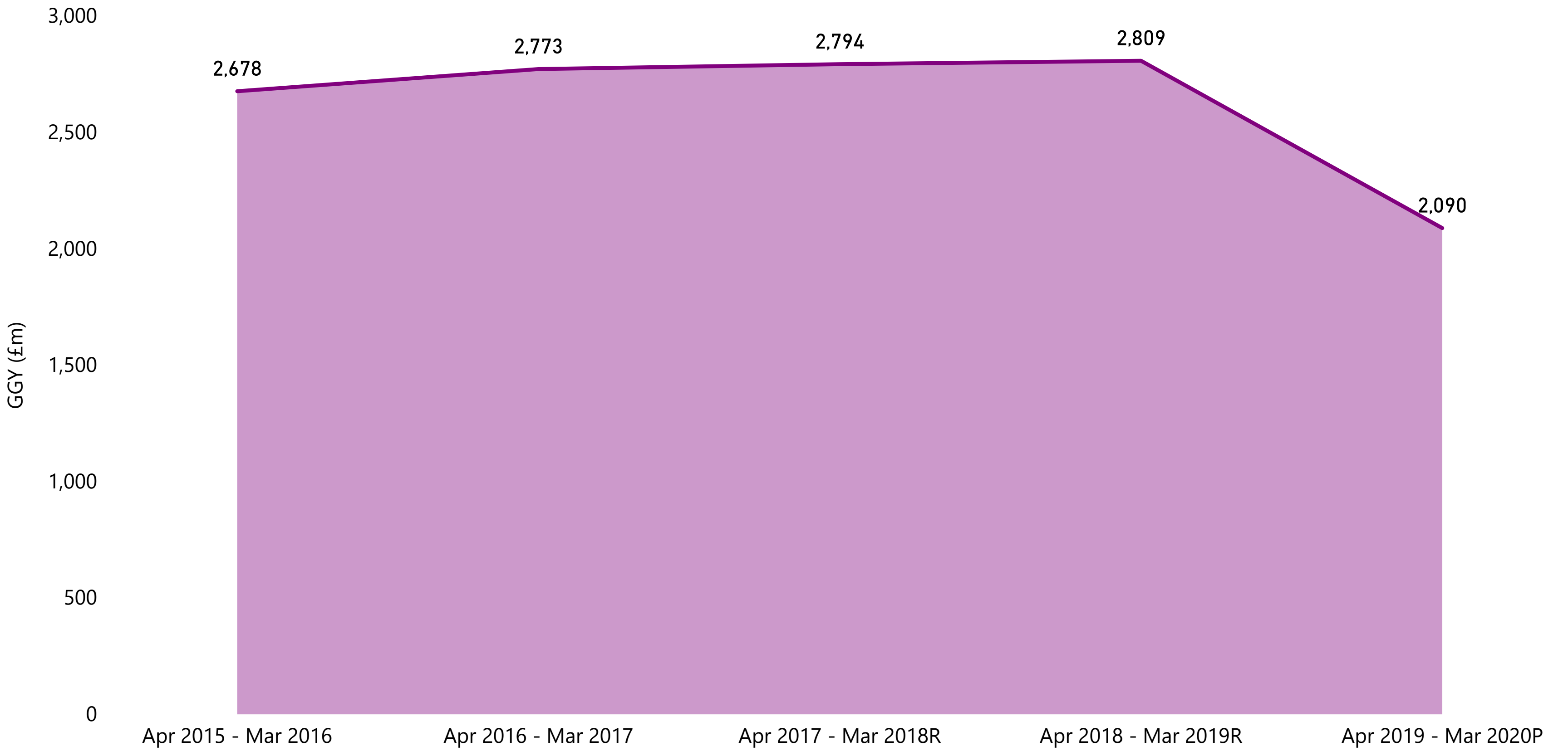
Between March 2019 and March 2020, the overall number of premises decreased by 685 (-6.4%) from 10,783 to 10,098.

By sector, there was a decline in non-remote betting by 639 (-7.7%), arcades by 43 (-2.6%) and bingo by 6 (-0.9%). There was an increase in non-remote casino premises by 3 (2.0%).

Between March 2016 and March 2020, the total number of licensed premises decreased by 1,517 (-13.1%) from 11,615 to 10,098.

Machines across non-remote sectors

Machines across non-remote sectors GGY (£m)



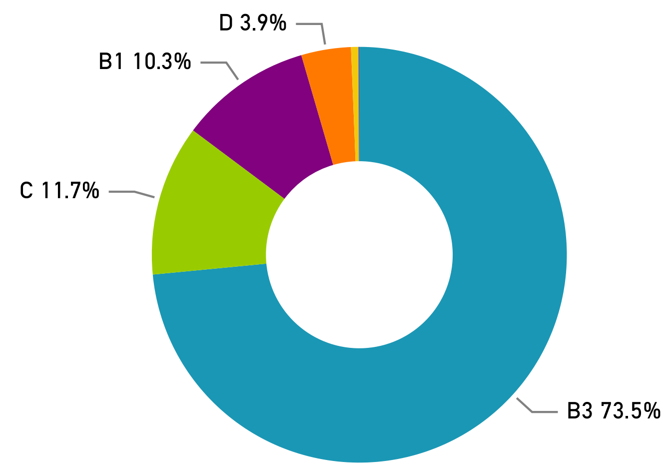
£2,090M

Machines GGY

-25.6%

Change from previous period

Machines across non-remote sectors GGY by sector latest period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for machines across non-remote sectors decreased by £719.1m (-25.6%) from £2,808.6m to £2,089.6m.

By category there was a decrease of GGY for B2 by £1.1bn (-99.0%), B4 by £3.8m (-74.9%), C by £2.8m (-1.1%) and D by £1.6m (-2.0%). There was an increase in B3 by £434.7m (39.5%) and B1 by £7.9m (3.8%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 machines across non-remote sectors GGY decreased by £588.1m (-22.0%) from £2,677.7m to £2,089.64m.

Notes:

A change in regulations reducing maximum stakes from £100 to £2 for Category B2 machines took effect in April 2019.

Arcades (non-remote)

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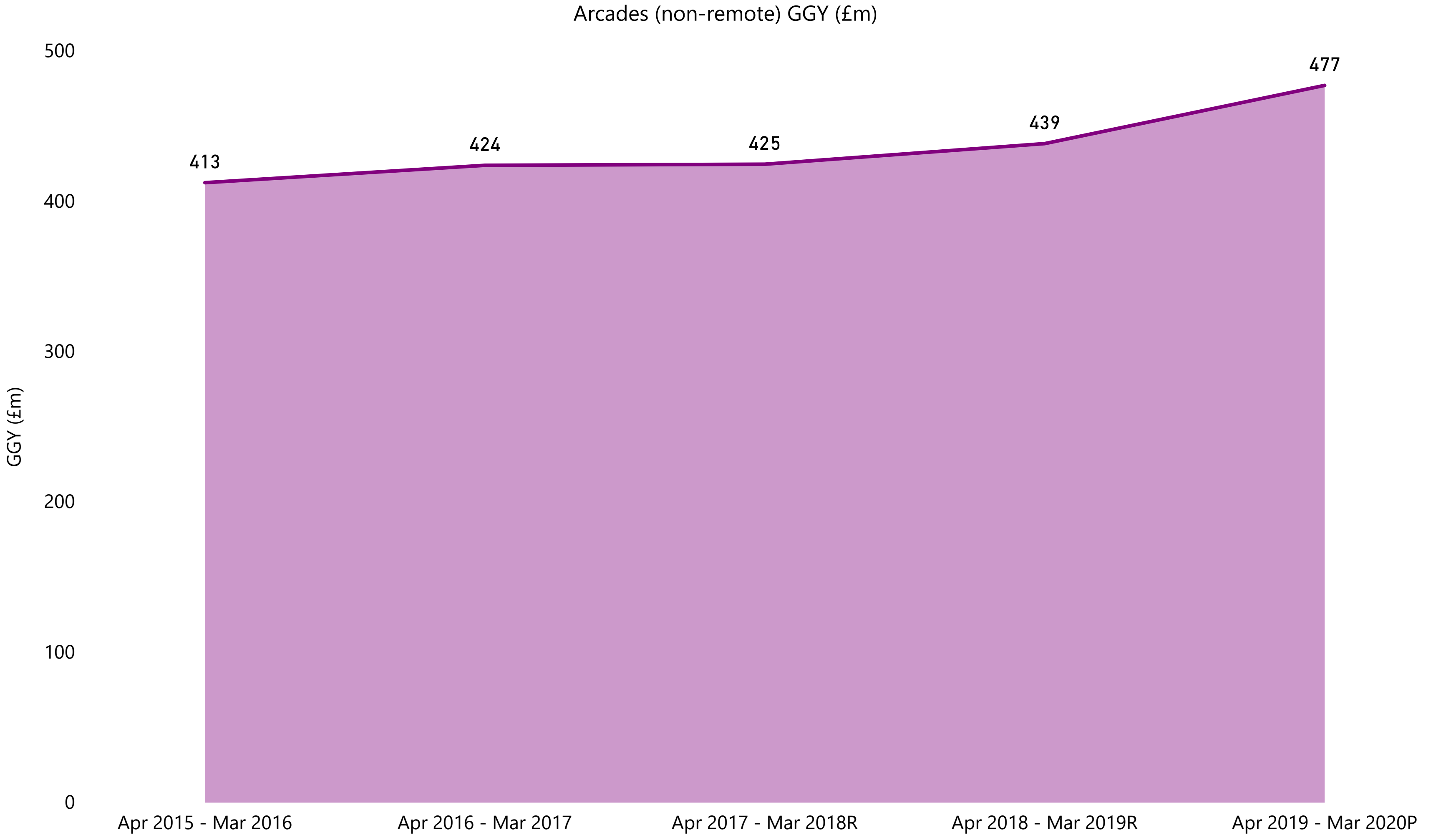
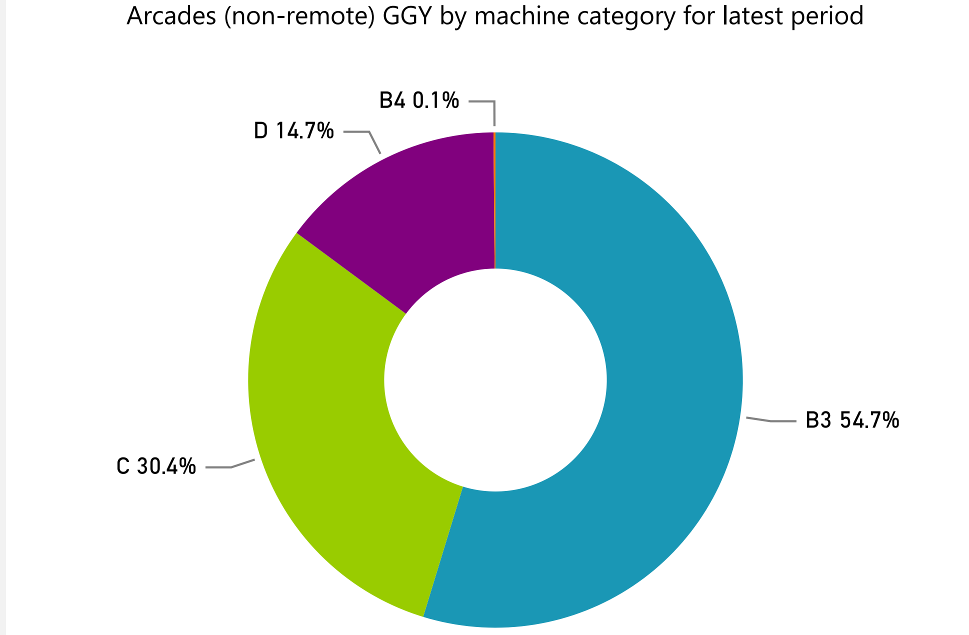


£477M

Arcades (non-remote) GGY

8.8%

Change from previous period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Arcades (non-remote) increased by £38.7m (8.8%) from £438.5m to £477.3m.

By category, there were increases for B3 by £30.1m (13.0%), C by £8.6m (6.3%) and D by £0.2m (0.3%). There was a decrease in GGY for B4 by £0.1m (-17.8%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 Arcades (non-remote) GGY increased by £59.2m (14.2%) from £418.1m to £477.3m.

Betting (non-remote)

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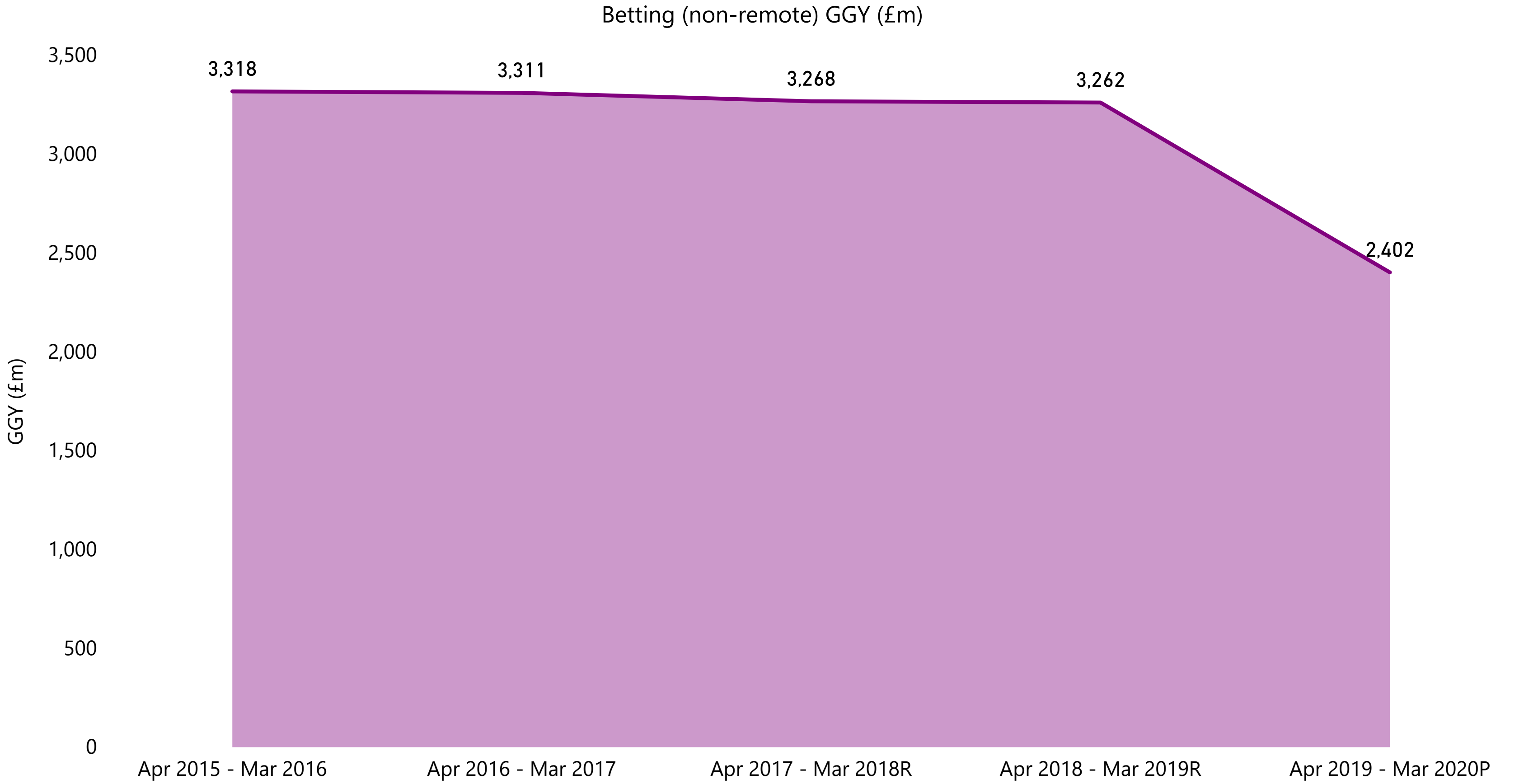
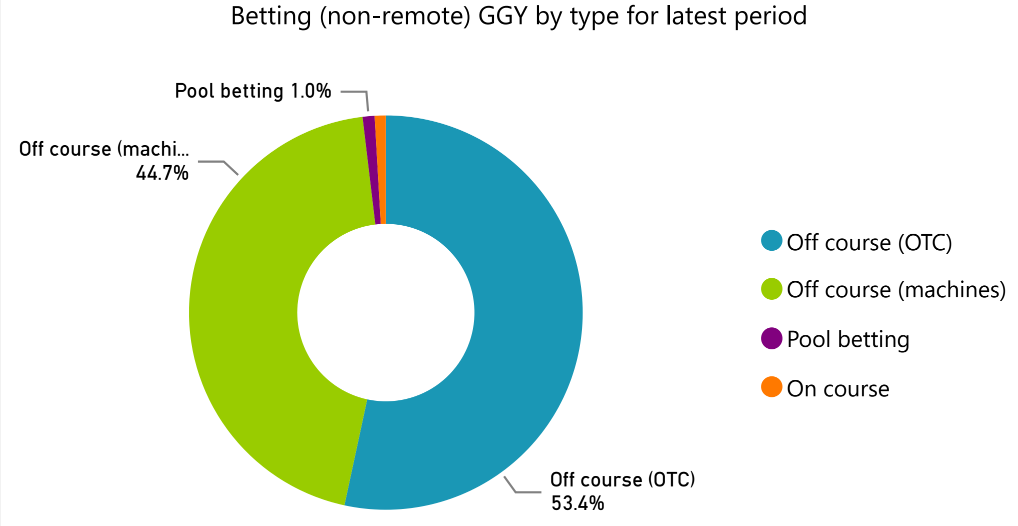


£2,402M

Betting (non-remote) GGY

-26.4%

Change from previous period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Betting (non-remote) decreased by £859.5m (-26.4%) from £3.3bn to £2.4bn.

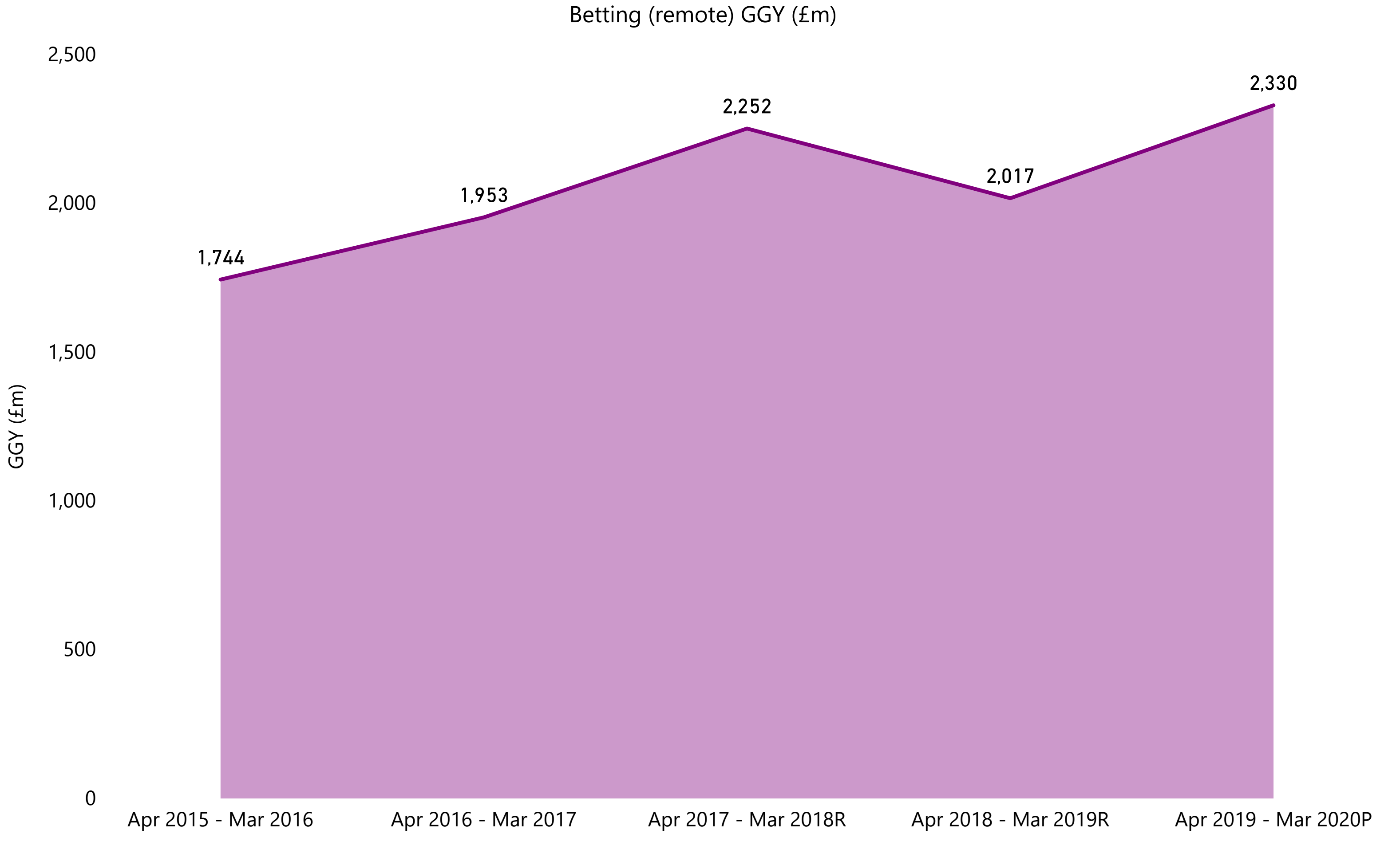
By type, there were decreases for Off-course (machines) by £751.6m (-41.2%), Off-course (over the counter) by £69.8m (-5.2%), Pool betting by £31.3m (-57.0%) and On-course by £6.9m (-23.9%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 Betting (non-remote) GGY decreased by £915.8m (-27.6%) from £3.3bn to £2.4bn.

Notes:

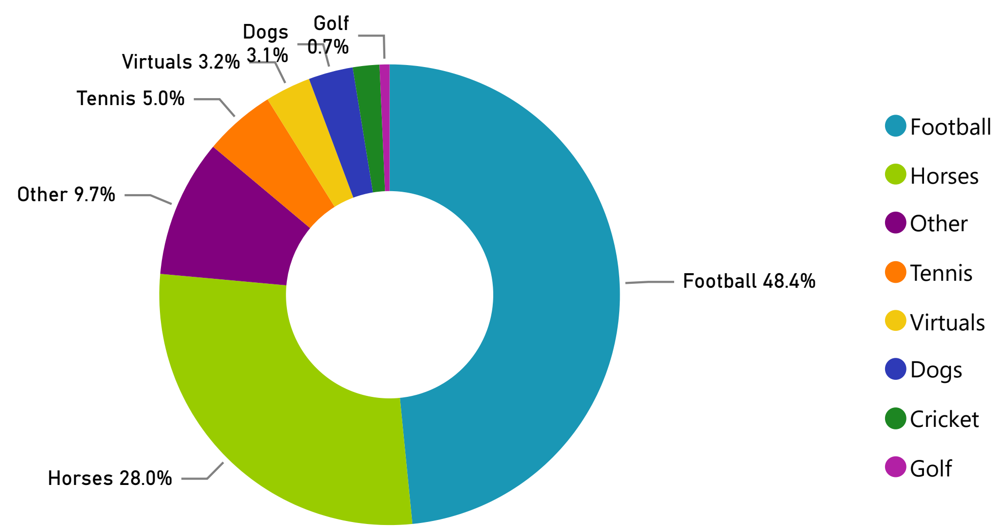
A change in regulations reducing maximum stakes from £100 to £2 for Category B2 machines took effect in April 2019.

Betting (remote)



£2,330M
Betting (remote) GGY

15.5%
Change from previous period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Betting (remote) increased by £312.4m (15.5%) from £2,017.4m to £2,329.7m.

By category, there were increases for Horses by £143.6m (28.2%), Football by £137.2m (13.8%), Dogs by £16.4m (29.2%), Cricket by £6.4m (17.2%), Virtual by £6.0m (8.7%), Other by £4.7m (2.1%) and Golf by £2.3m (16.4%). There was a decrease in GGY for Tennis by £4.2m (-3.5%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 Betting (remote) GGY increased by £585.8m (33.6%) from £1.7bn to £2.3bn.

Bingo (non-remote)

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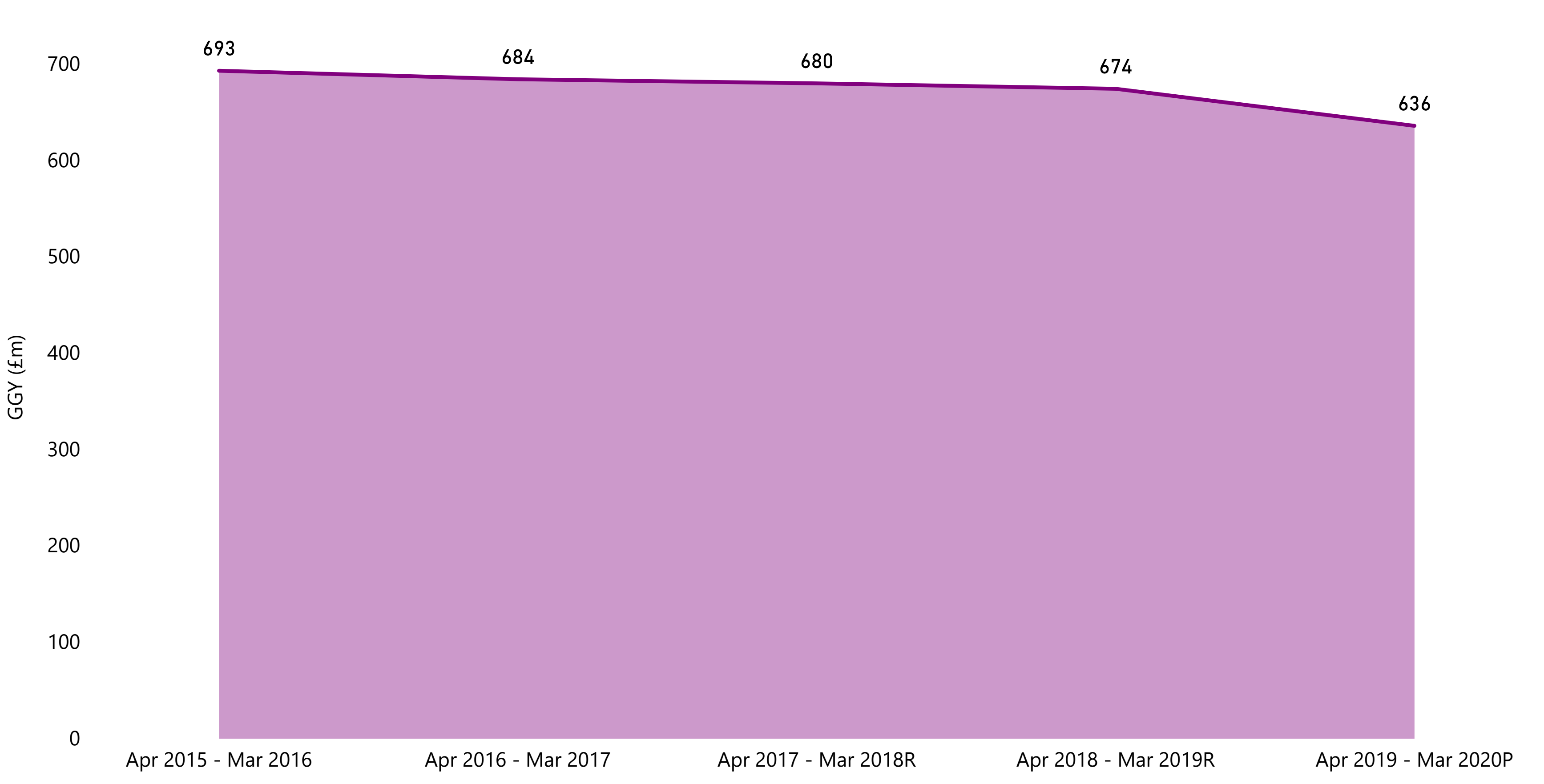
Bingo (non-remote) GGY (£m)



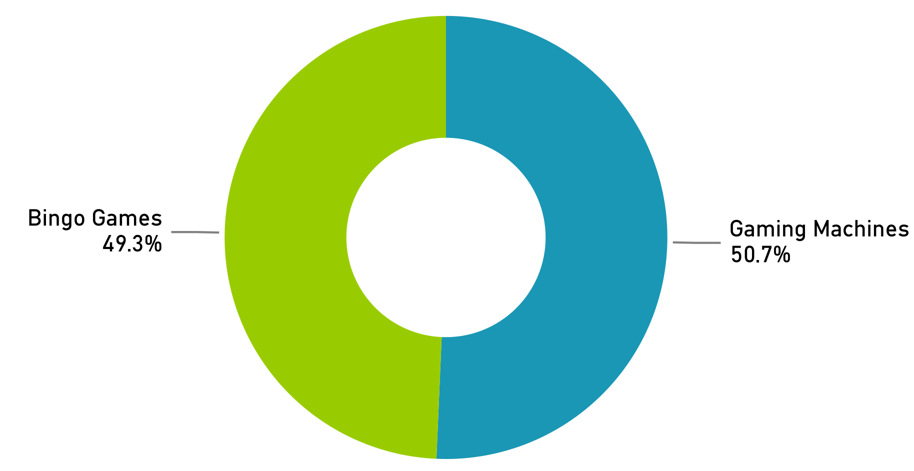
£636M

Bingo (non-remote) GGY

-5.7%

Change from previous period

Bingo (non-remote) GGY by type for latest period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Bingo (non-remote) GGY decreased by £38.4m (-5.7%) from £674.4m to £635.9m.

By type, there were decreases in GGY for Bingo Games by £36.2m (-10.4%) and Machines by £2.2m (-0.7%).

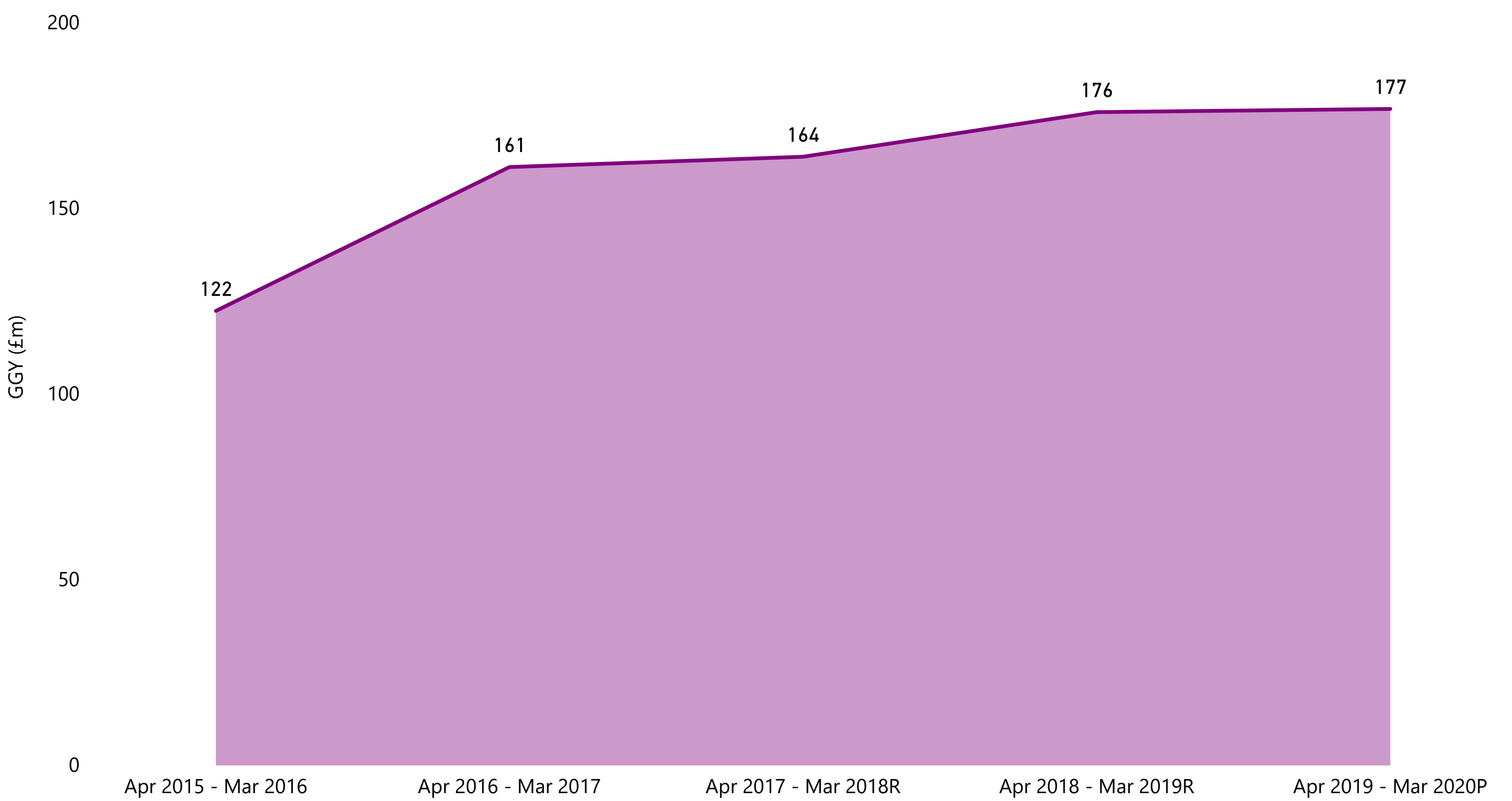
Between periods April 2015 - March 2016 and April 2019 - March 2020 Bingo (non-remote) GGY decreased by £57.2m (-8.2%) from £693.1m to £635.9m.

Notes:

Data from electronic bingo terminals (EBTs) is included within bingo games and gaming machines GGY figures.

Bingo (remote)

Bingo (remote) GGY (£m)



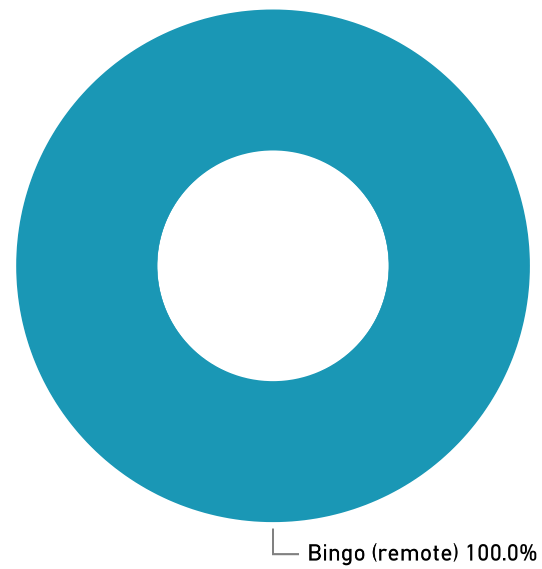
£177M

Bingo (remote) GGY

0.5%

Change from previous period

Bingo (remote) GGY by type for latest period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Bingo (remote) increased by £0.9m (0.5%) from £175.9m to £176.8m.

Between periods April 2015 - March 2016 and April 2019 - March 2020 Bingo (remote) GGY increased by £54.4m (44.4%) from £122.4m to £176.8m.

Casino (non-remote)

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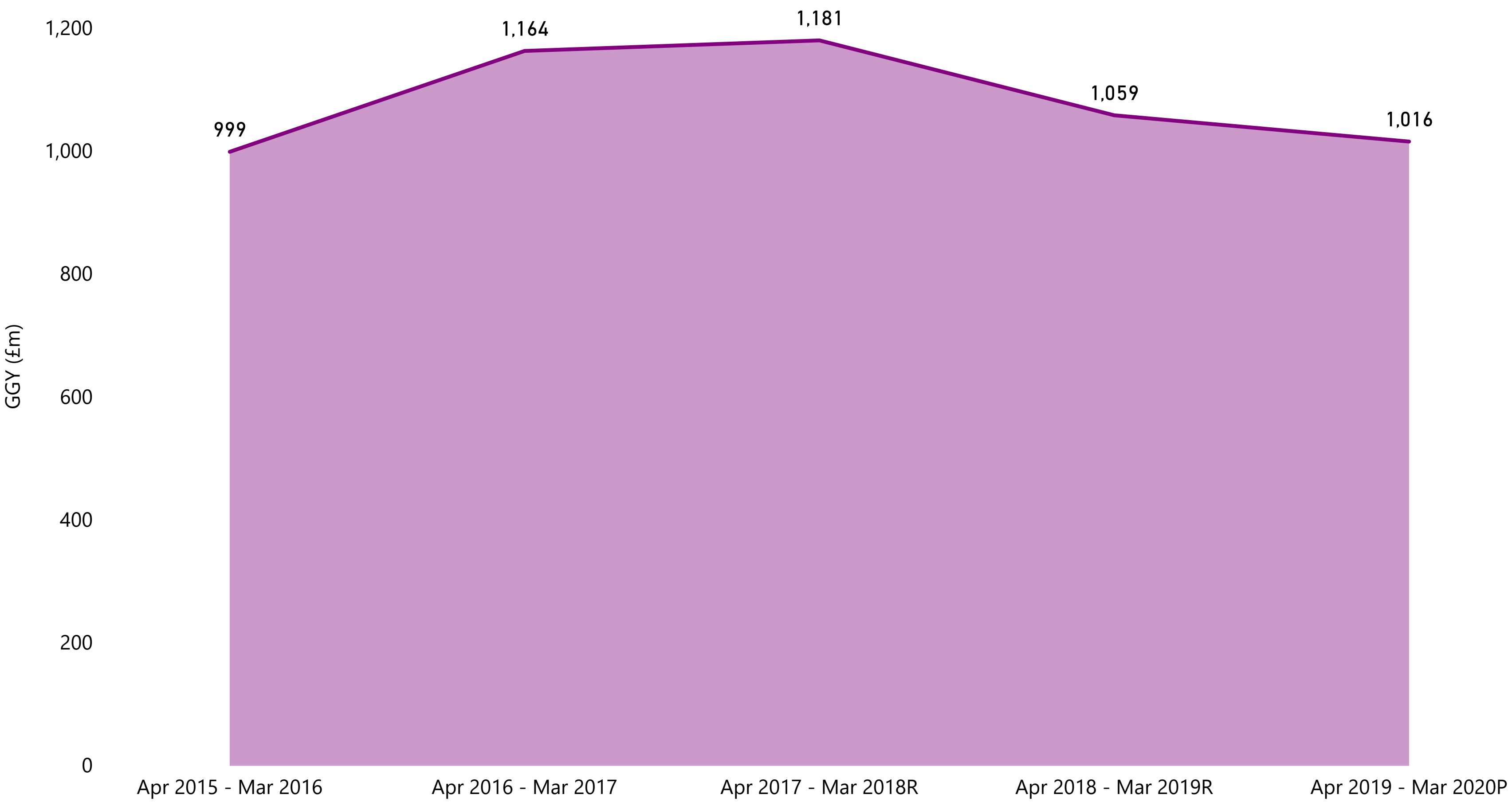
Casino (non-remote) GGY (£m)



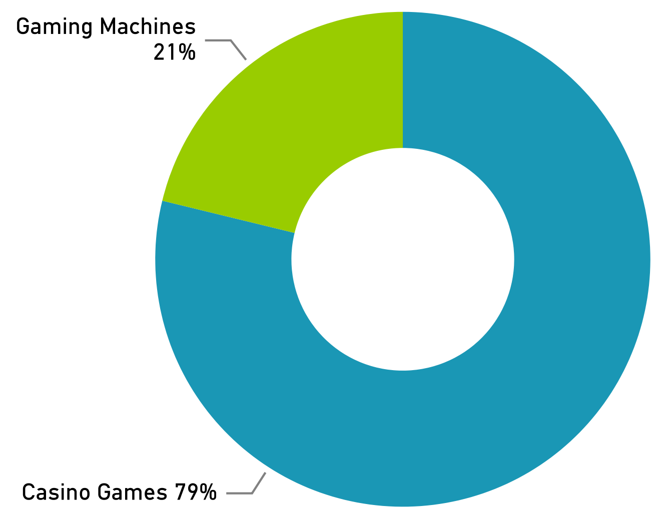
£1,016M

Casino (non-remote) GGY

-4.0%

Change from previous period

Casino (non-remote) GGY by type for latest period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Casino (non-remote) GGY decreased by £42.8m (-4.0%) from £1.1bn to £1.0bn.

By type, there were decreases in GGY for Casino Games by £38.8m (-4.6%) and Machines by £3.9m (-1.8%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 Casino (non-remote) GGY increased by £16.7m (1.7%) from £999.4m to £1.0bn.

Casino (remote)

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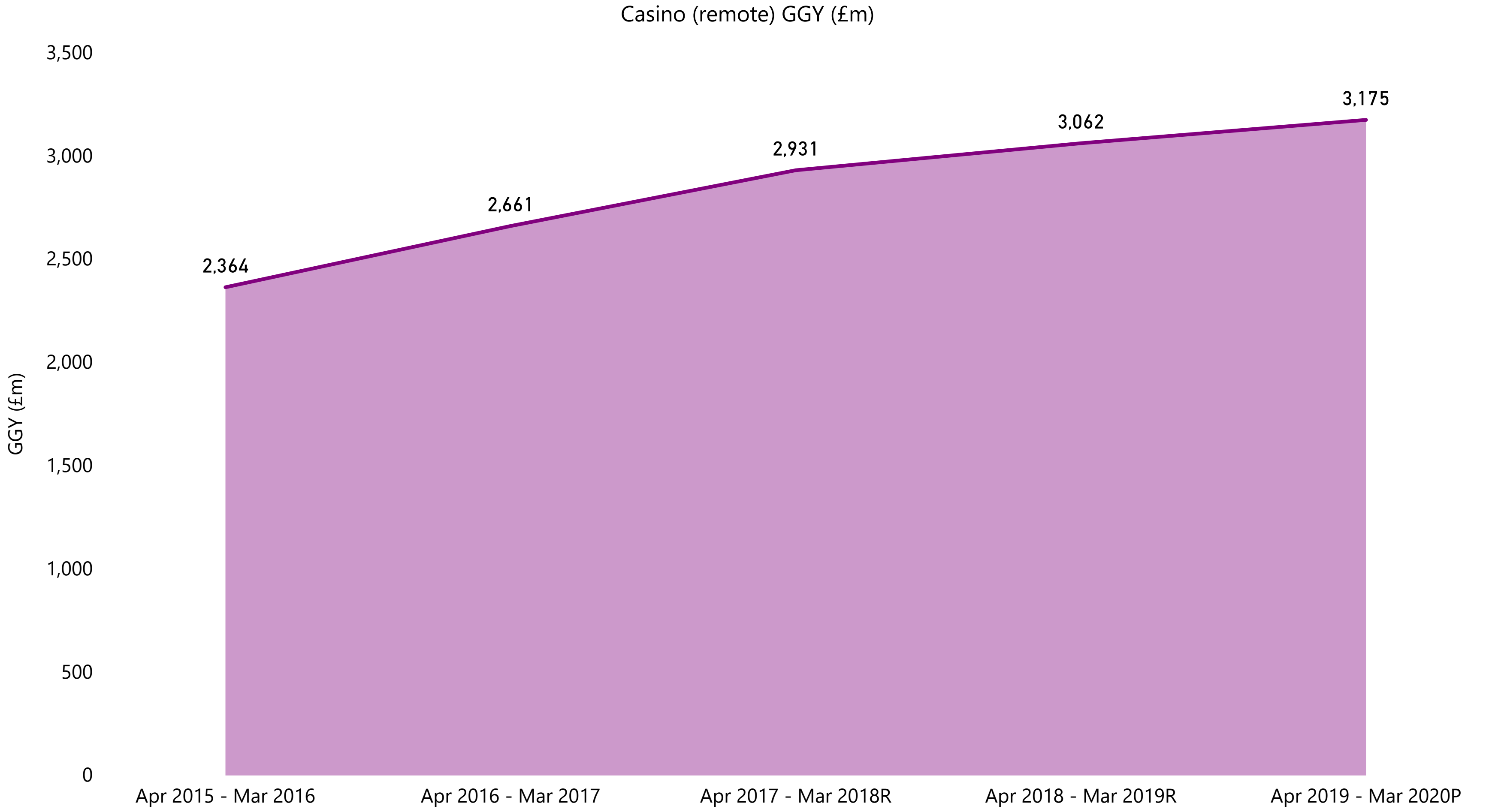
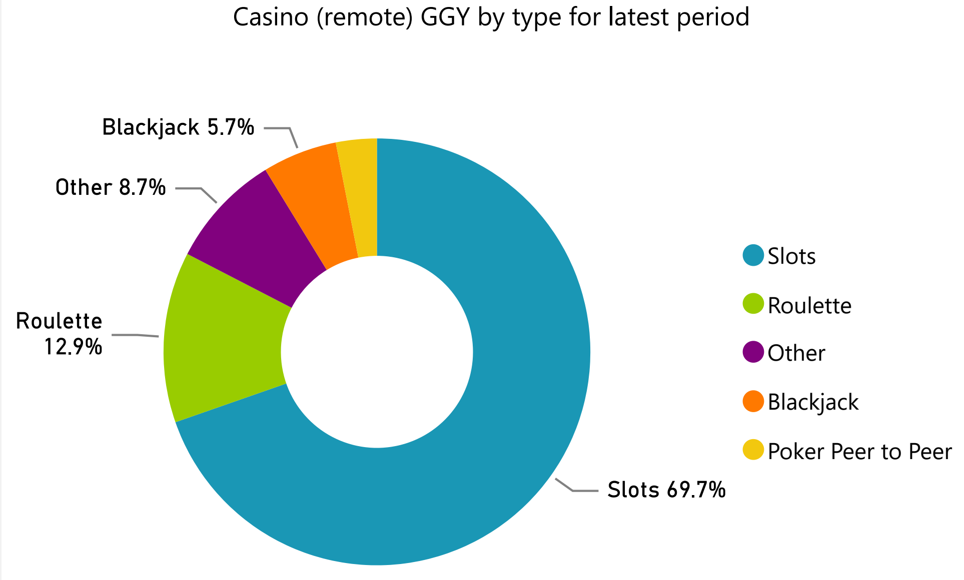


£3,175M
Casino (remote) GGY

3.7%
Change from previous period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY for Casino (remote) increased by £113.1m (3.7%) from £3.1bn to £3.2bn.

By category, there were increases for Slots by £104.2m (4.9%), Other by £42.8m (18.5%) and Poker peer to peer by £2.6m (2.7%). There was a decrease in GGY for Blackjack by £29.3m (-14.0%) and Roulette by £7.2m (-1.7%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 Casino (remote) GGY increased by £810.6m (34.3%) from £2.4bn to £3.2bn.

Lotteries (non-remote and remote)

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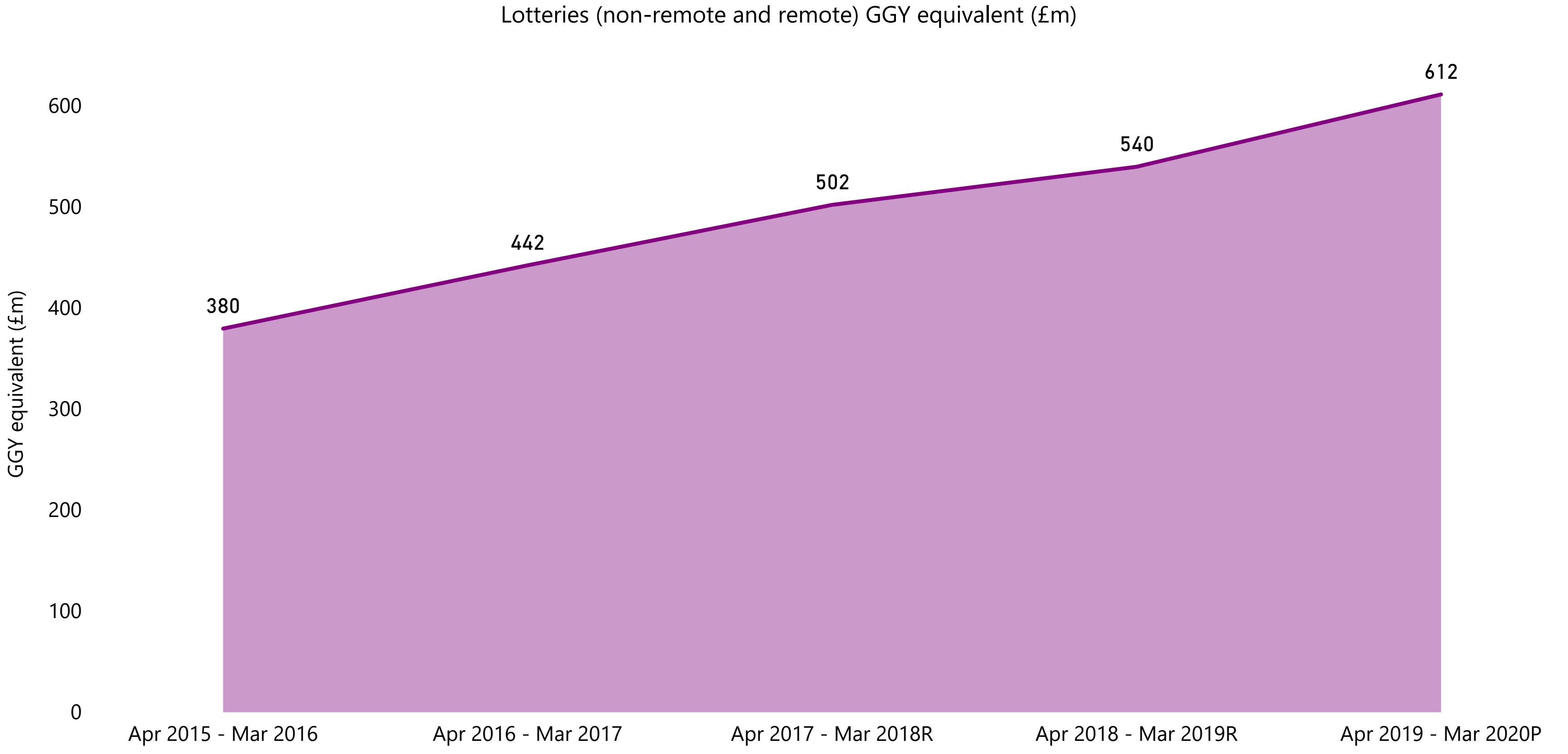
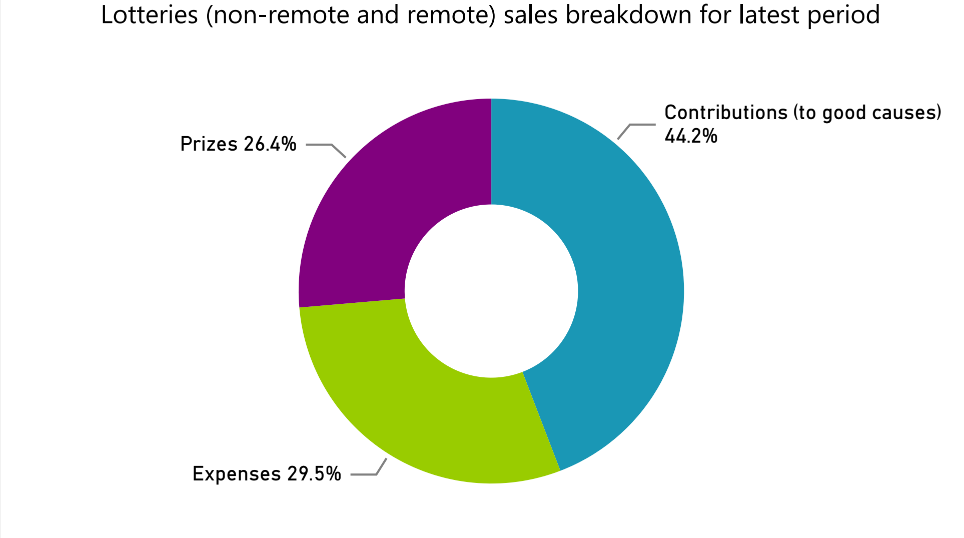


£612M

Lotteries GGY equivalent

13.3%

Change from previous period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY equivalent for Lotteries (non-remote and remote) increased by £71.6m (13.3%) from £540.0m to £611.6m.

There were increases in ticket sales by £96.5m (13.2%) from £734.0m to £830.6m, expenses by £36.1m (17.3%) from £208.7m to £44.8m , balance (to good causes) by £35.5m (10.7%) from £331.3m to £366.8m and prizes by £24.9m (12.8%) from £194.1m to £219.0m.

Between periods April 2015 - March 2016 and April 2019 - March 2020 the GGY equivalent for Lotteries (non-remote and remote) increased by £231.9m (61.1%) from £379.8m to £611.6m.

Notes:

GGY equivalent for lotteries is total proceeds minus prizes and includes any GGY equivalent raised through external lottery managers.

These charts include data from large society lotteries and local authority lotteries. They do not include figures from small society lotteries or The National Lottery.

The National Lottery (non-remote and remote)

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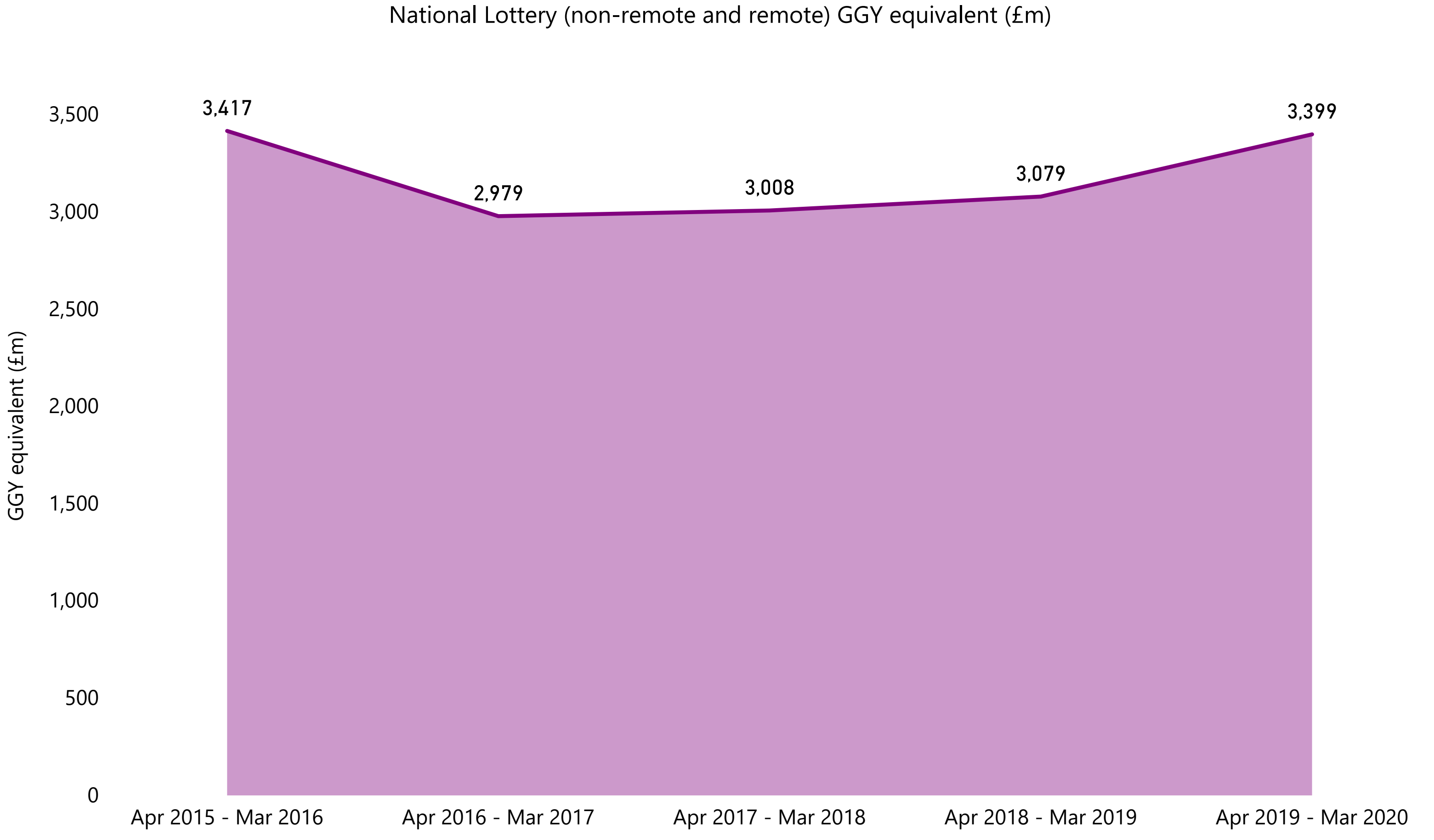
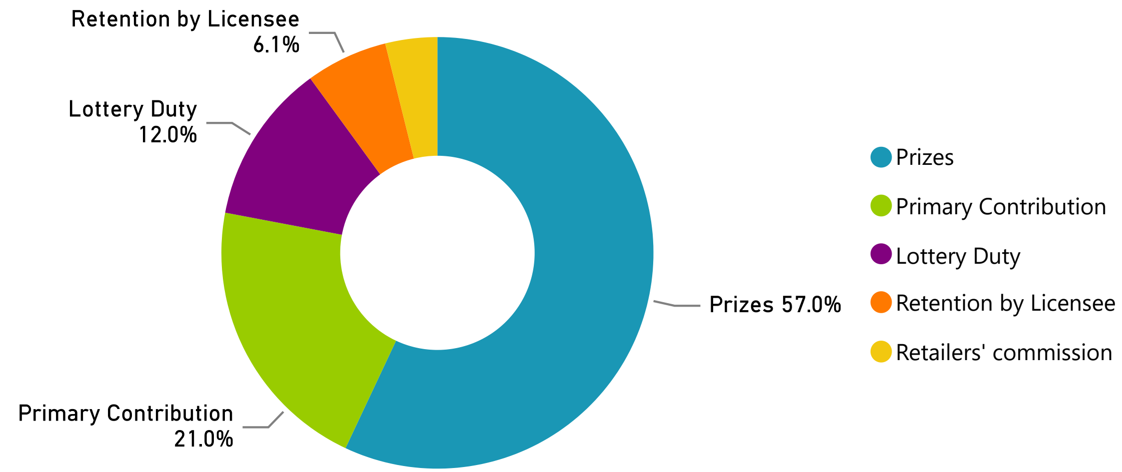


£3,399M

National Lottery GGY equivalent

10.4%

Change from previous period



Key Points:

Between periods April 2018 - March 2019 and April 2019 - March 2020, GGY equivalent for The National Lottery increased by £319.9m (10.4%) from £3.1bn to £3.4bn.

There were increases in ticket sales by £696.4m (9.7%), prizes by 376.5m (9.1%), Contributions (to good causes) by £172.4m (11.6%).

Between periods April 2015 - March 2016 and April 2019 - March 2020 the GGY equivalent for The National Lottery decreased by £17.6m (0.5%).

Notes:

GGY equivalent for the National Lottery is total proceeds minus total prizes. This National Lottery data includes data from Great Britain and Northern Ireland.

Making gambling fairer and safer

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For further data and information on the gambling industry, please visit our website at: www.gamblingcommission.gov.uk

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