GAMBLING COMMISSION

Industry statistics

April 2016 to March 2018
Updated to include October 2017 to September 2018

GAMBLING COMMISSION

Contents

Headline findings

The headline findings in this report indicate areas of interest across the industry or within each sector, highlighting percentage changes and changes in trends.

£14.5bn

Total Gross Gambling Yield (GGY) of the Great Britain gambling industry
(Oct 2017 – Sep 2018) (0.4% decrease from Apr 2017 – Mar 2018)

106,670

Total number of employees in the Great Britain gambling industry
(Sep 2018) (1.4% decrease from Mar 2018)

8,423

Total number of betting shops in Great Britain
(Sep 2018) (1.5% decrease from Mar 2018)

650

Total number of bingo premises in Great Britain
(Sep 2018) (1.1% decrease from Mar 2018)

152

Total number of casino premises in Great Britain
(Sep 2018) (1 more than Mar 2018)

1,639

Total number of licensed arcades in Great Britain
(Sep 2018) (5.3% decrease from Mar 2018)

£5.6bn

Total GGY for the remote sector
(Oct 2017 – Sep 2018) (2.9% increase from Apr 2017 – Mar 2018)

39%

Market share of the remote sector
(Oct 2017 – Sep 2018) (1.2% increase from Apr 2017 – Mar 2018)

183,813

Total number of gaming machines in Great Britain
(Oct 2017 – Sep 2018) (2.4% increase from Apr 2017 – Mar 2018)
(excludes those requiring only a local authority permit)

£1.5bn

Contributions to good causes from The National Lottery
(Oct 2017 – Sep 2018) (0.3% increase from Apr 2017 – Mar 2018)

£314m

Contributions to good causes from large society lotteries
(Oct 2017 – Sep 2018) (5.1% increase from Apr 2017 – Mar 2018)

Executive summary

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.

Industry Statistics provides analysis of the gambling industry in Great Britain. Aggregated information is presented by sector, which includes data on gaming machine numbers and their Gross Gambling Yield (GGY), and employee numbers.

This report reflects headline findings that describe the current gambling market and is accompanied by a detailed data file.

The GGY for the industry was £14.5bn in the year October 2017 to September 2018, as reported by operators licensed and regulated by the Gambling Commission. The gambling industry demonstrates a slight decrease overall of 0.4% on the previous reporting period.

Remote gambling (online) is the largest sector by GGY. This sector constitutes 38.8% of the overall market with £5.6bn GGY. Within the remote sector, casino games have generated £3.0bn in GGY, predominantly through slots games (£2.0bn). GGY for remote betting totals £2.5bn and is dominated by football and horse betting.

Non-remote betting GGY has decreased by £93.9m currently totalling £3.2bn to make it the second largest sector by GGY. GGY for off-course, on-course and pool betting activities declined by £53.9m, £1.0m and £38.9m respectively over the last reporting period. Within the off-course data, machines GGY also decreased for the first time since records were published (April 2008 – March 2009) by £5.6m during the same period. Machines currently represents 59.2% of the total off-course GGY. Total betting premises have continued to decline for the fifth consecutive reporting period to 8,423.

National Lottery GGY equivalent has decreased by £9.3m to £3.0bn. The primary contribution to good causes increased by £4.5m to £1.5bn. Ticket sales decreased by £34.2m to £6.9bn during this period.

Non-remote bingo sector GGY has decreased slightly to £677.8m, 47.6% of which is derived from machines.

The non-remote casino sector has seen a decrease of £110.4m in casino games GGY, from £969.4m to £859.0m, led by punto banco which has decreased by £91.8m to £138.8m. American roulette has seen a decrease from £341.4m to £329.3m. Blackjack increased slightly from £168.0m to £171.4m.

Large society lotteries, which traditionally have the smallest market share along with arcades, have seen a GGY equivalent increase to £517.8m, with balance to good causes at £313.8m, a £15.2m increase from the last reporting period. This is the highest contribution figure reported to date.

In the arcades sector, adult gaming centres show a slight decrease in GGY, now reporting £369.6m, down from £371.7m last period. Decreases can be seen in categories C and D by £1.2m and £3.2m respectively. GGY for licensed family entertainment centres has decreased, now reporting £52.0m. Note that this data does not include unlicensed family entertainment centres which operate using a permit from the local authority.

The overall number of gaming machines across the industry has continued on an upward trend to 183,813. B2 numbers however have decreased by 529 to 33,360 since the last reporting period.

Machine GGY has decreased in all sectors except casino but increased in all categories except B2 and D. Betting shops continue to generate the highest machines GGY at £1.8bn. Across all sectors, Category B2 machines have decreased by £250.2m to £1.5bn but still represents the highest category for GGY.

The number of licensed activities has decreased by 2.2% to 3,676. These are held by 2,757 operators (down 2.2%).

The number of licensed gambling premises in Great Britain has fallen by 2.1% to 10,714.

Industry overview

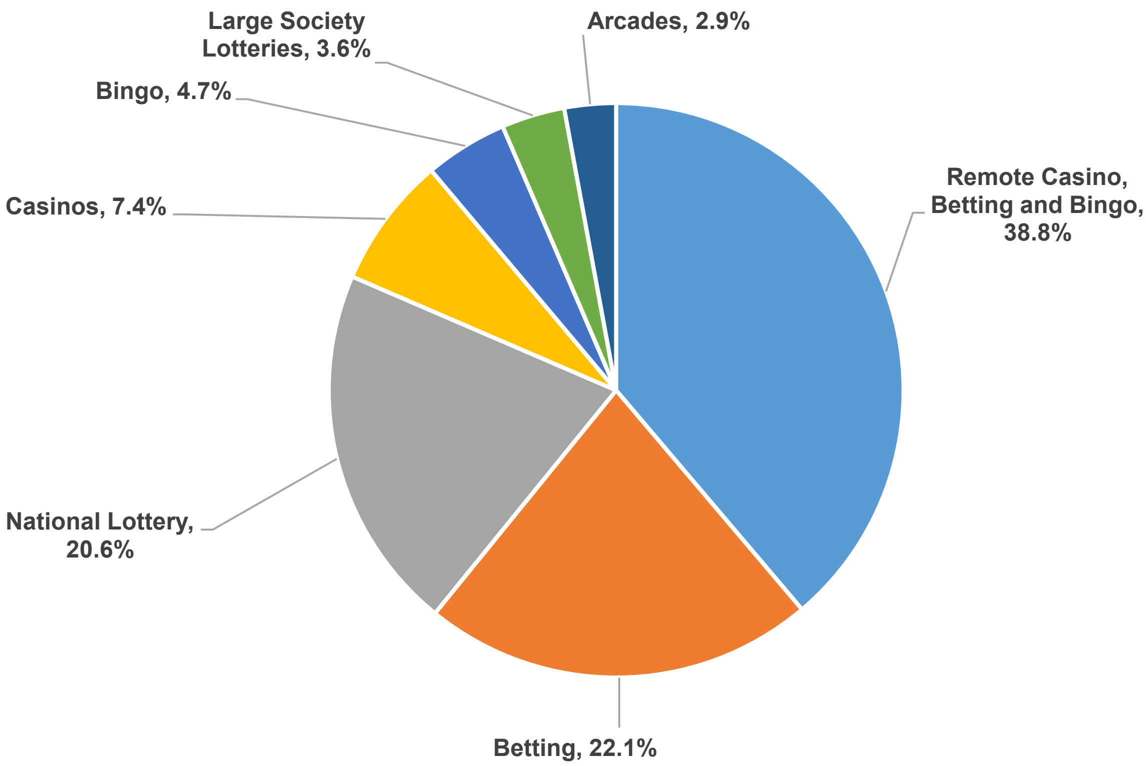
Gross gambling yield

During the period October 2017 to September 2018, the regulated GB gambling industry generated a gross gambling yield (GGY) or equivalent[1] of £14.5bn, a 0.4% decrease compared with the previous reporting period. This Industry Statistics document provides a half-year update to the regular analysis published in November. As such there is a six month crossover of data between the last 2 columns in Table 1.

Table 1: Industry GGY by sector (£m)[1]

Sector	Apr 2016-Mar 2017	Apr 2017-Mar 2018	Oct 2017-Sep 2018
Arcades (non-remote)	430.13	427.48	421.62
Betting (non-remote)	3,396.51	3,298.81	3,204.94
Bingo (non-remote)	687.67	682.80	677.82
Casinos (non-remote)	1,163.54	1,180.58	1,075.25
Remote casino, betting and bingo	4,725.20	5,476.09	5,633.21
National Lottery (remote and non-remote)	2,978.60	3,007.80	2,998.41
Lotteries (remote and non-remote)	442.43	507.27	517.80
TOTAL	13,824.08	14,580.83	14,529.05

Figure 1: Industry GGY by sector



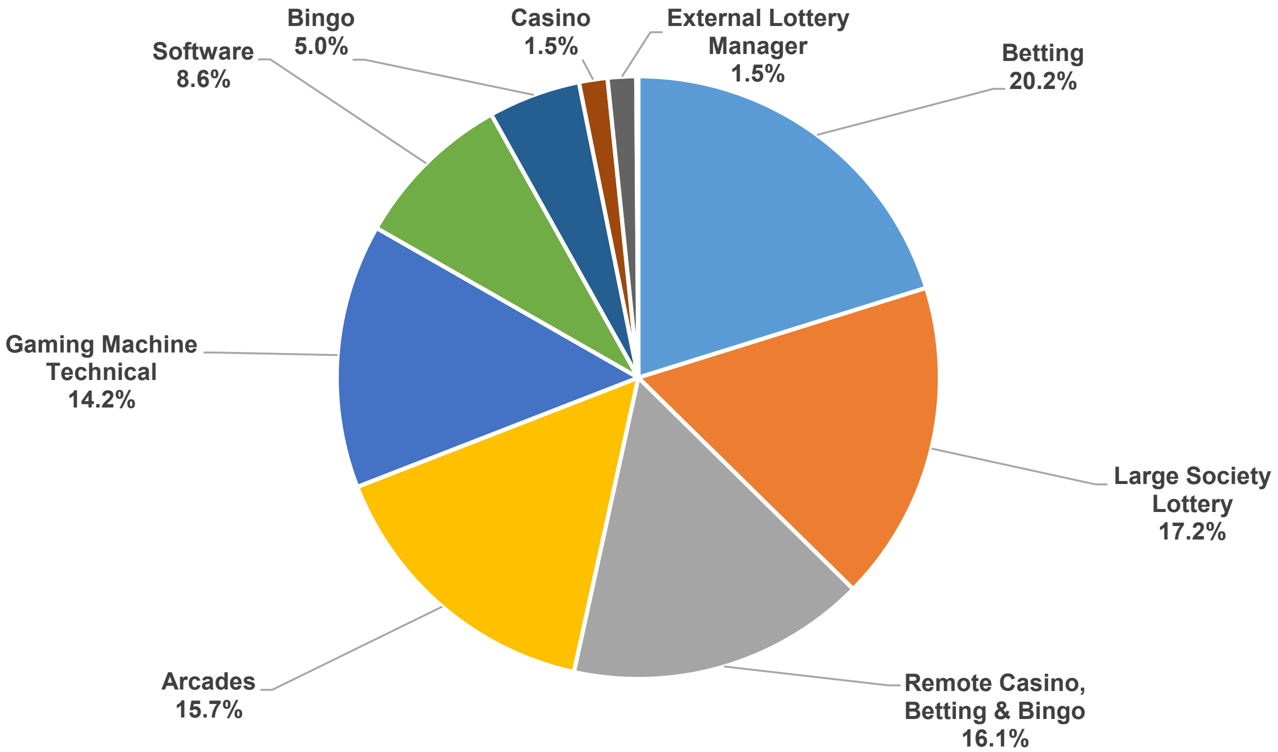
[1] GGY equivalent for the National Lottery and large society lotteries is total proceeds minus total prizes.

Licensed operators

As at September 2018 there were a total of 2,757 operators licensed by the Gambling Commission, 351 of which operate across more than one sector.

Between them, those operators held licences (remote and/or non-remote) that entitled them to conduct 3,676 activities (a 2.2% decrease on the previous period).

Figure 2: Licensed activities held by sector



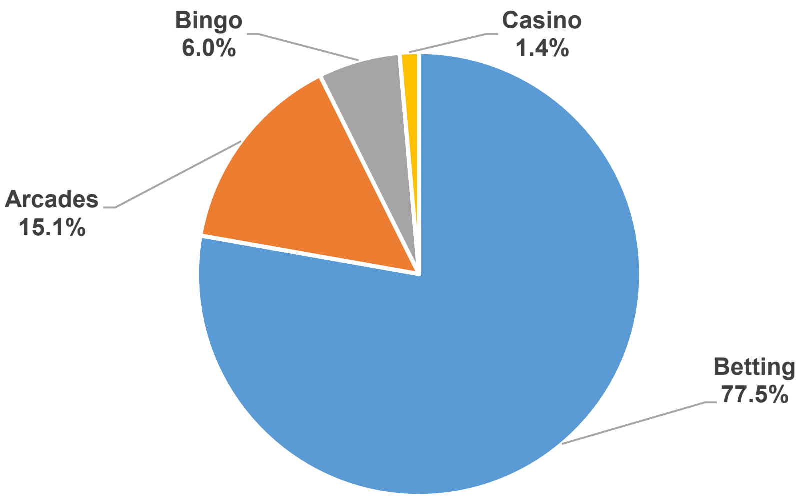
Gambling premises

Across GB, there were 10,714 gambling premises used by licensed operators in September 2018, a decrease of 230 (2.1%) since March 2018.

Licensing authority premises

In addition to premises used by licensed operators, there were 52,292 premises where gambling is permitted and controlled by licensing authorities. Data on non-Commission licensed premises can be found in [Licensing authority statistics.]

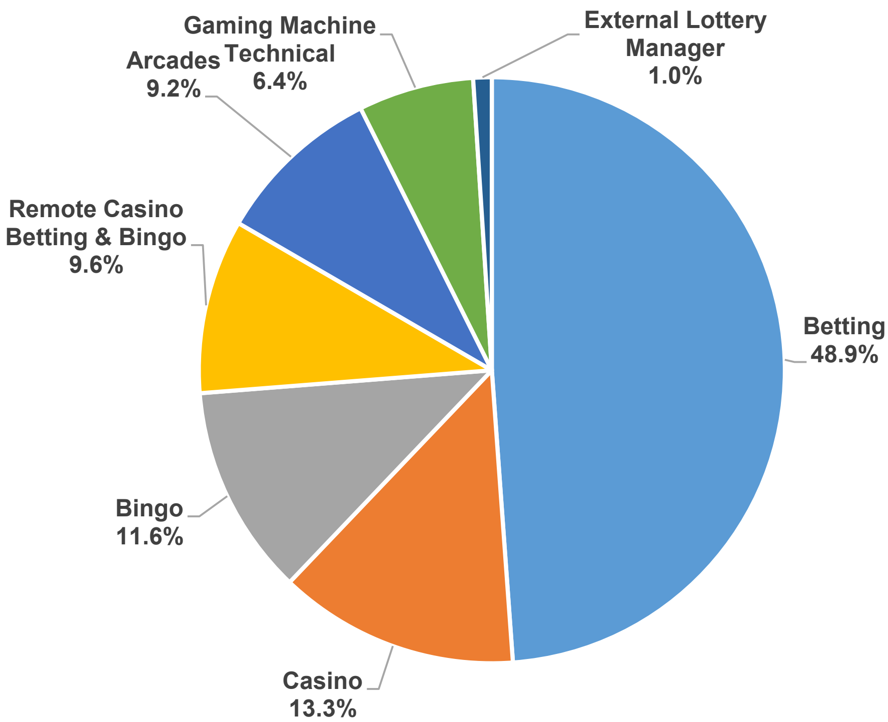
Figure 3: Premises sector used by non-remote licensed operator



Workforce

As at September 2018 there were 106,670 people employed by operators licensed by the Gambling Commission, a 1.4% decrease since March 2018.

Figure 4: Workforce by sector



Social responsibility

Operators have a duty to report various social responsibility related activity to the Commission. The table below contains activity reported during the period October 2017 to September 2018.

Table 2: Social responsibility overview

Sector	Self-exclusions[2]	Breaches of self-exclusions[3]	Opting to return following self-exclusion	Underage challenged on entry[4]	People who having gambled were unable to verify their age
Arcades	2,775	352	684	6,541	2,403
Betting	37,913	19,885	4,876	65,433	16,421
Bingo	1,405	351	826	-	89
Casino	6,541	3,023	4,212	22	52
Remote	1,518,266	112,093	73,200	-	100,288
Total	**1,566,900**	**135,704**	**83,798**	**71,996**	**119,253**

2 The number of people who have self-excluded and the number of people who have cancelled their self-exclusion may be lower than these figures because individuals may have self-excluded from more than one venue or operator and therefore been counted more than once.

3 Known breaches of self-exclusion includes the number of times any self-excluded customer has attempted to gain access to facilities, attempted to gamble (for example, attempting to use an internet betting account following self-exclusion), or actually gambled. It is not limited to an attempt to gamble, and includes attempts to enter premises or access online gambling facilities.

4 The number of occasions upon which a person was unable to verify their age when challenged, after entering the premises. Children are allowed in FEC and bingo premises.

GAMBLING COMMISSION

making gambling fairer and safer

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For further information or to register your interest in the Commission please visit our website at: www.gamblingcommission.gov.uk

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