Due to the impact Covid-19 is having on operations across the UK we have had to reduce our phoneline opening hours.

Our phonelines are open on Monday, Wednesday and Friday between 10 am and 4 pm.

The contact us service is also available for answers to common questions and we will aim to respond to these enquiries as quickly as possible.

If you have a question about your gambling, or the gambling of someone close to you, our Guidance and FAQs page may provide valuable information. Our what we do page also provides an overview of the types of queries we are able to help consumers with in the first instance.

The National Gambling Helpline is also available 24 hours a day, seven days a week through GamCare. It is there to support those suffering from gambling problems or those concerned about the affect gambling is having on people close to them. You can call them free on 0808 8020 133, or visit gamcare.org.uk.

Covid 19 and its impact on gambling – what we know so far

Overview

The Covid-19 crisis continues to affect everyone across Great Britain. The lockdown has also brought significant consumer behavioural change and major impacts on the gambling industry.

Our responsibility during the crisis is to protect consumers and we are focused on understanding how the risks posed to them are changing. To help understand these risks and trends, and to inform public knowledge, we are collecting additional data from operators[1] and consumer research[2] – allowing us to build a clearer picture week by week.
1. General consumer trends

Current consumer trends provide important context at the moment for looking at the gambling market, in terms of how we feel, the money in our pocket and how we are spending our time.

Research by Savanta reports 20% of the population recognising a decrease in their mental health and fear of catching the virus remains high, peaking at 61% in late March. There has also been a significant financial impact, where the same research notes that 40% of people have seen their disposable income decrease.

Naturally while spending most of our time in the home, we have also seen changes in the way people engage with news and entertainment. This is particularly so among people who gamble. According to YouGov data, those who had gambled in the past four weeks were more likely than the national average to have:

- Spent more online on entertainment (17% of gamblers compared to 11% of all adults)
- Watched TV more (58% of gamblers compared to 42% of all adults)
- Viewed more news online (53% of gamblers compared to 49% of all adults)
- Consumed more on-demand entertainment (51% of gamblers compared to 35% of all adults)

2. Gambling Market Impacts

On 20 March all retail gambling venues closed – meaning that, at a stroke, activities that normally generate 50% [3] of the overall market (excluding lotteries) stopped.

Operator data collected by the Commission comparing March 2020 with March 2019, provides an initial insight into the changing shape and size of the market. April data, to be reported shortly, will provide an even clearer picture. [4]
a. **Overall, fewer consumers are gambling but some people, who are gambling already, are trying new products**

The crisis does not appear to have attracted many new consumers to gambling. According to YouGov research from 16-17 April[5], only 0.2% of all adults surveyed stated that they had started gambling for the first time during the last four weeks.

Operator data on overall active player accounts[6] indicates a 3% decrease, driven in part by real event betting (active players down 11%[7]), where clearly the chance to bet on top quality sport has disappeared.

The YouGov research shows that a third of past four-week gamblers say they have tried one or more gambling activities for the first time during lockdown[8]. Operator data shows that certain products are seeing active player increases compared to this time last year (some from low comparative bases of players), which are generally those with a faster play cycle, such as slots.

![Total number of bets placed by product during March 2020 (year-on-year change)](image)

This shift is against the backdrop of relatively stable advertising awareness,
where the YouGov research[9] shows that 32% of adults recalled seeing marketing for online bingo, casino or slots games in the last four weeks. This is comparable with 39% in our pre-lockdown research[10].

b. Overall gamblers are playing products at the same rate or less, but a majority of those who have participated in 3 or more gambling activities in the last 4 weeks are spending more time or money. We are also seeing an increase in the number of sessions over an hour.

Although operator data indicates that the overall number of active customer accounts has decreased slightly between March 2019 and March 2020, this decrease is not seen across all products.

The volume of activity on certain products appears to be growing[11] in that time, albeit that within many products the number of active players are growing faster than the number of bets[12]. This indicates an overall growth in the product, although implies a decrease in the average number of bets per customer. This is not true of slots where the average is maintained.

This is consistent with our YouGov Covid-19 tracker research which shows that
the majority (three quarters) of recent gamblers indicate that they have not increased the time or money they have spent on gambling.

The profile is different for engaged\[13\] gamblers where two thirds (64%) have increased either the amount of time or money they have spent on at least one gambling activity, including National Lottery products.

At an overall level year on year to March 2020, the average session length reported by operators has decreased by 4 minutes (down to 22 minutes). Within that though the number of sessions which lasted over 1 hour increased by 23%. This meant that almost one in eight sessions now lasted in excess of 1 hour.

3. Next Steps

Our key principles, as we continue to try and understand better changes that are happening, are to try and increase our confidence in and understanding of the data that we have and seek further information on data points of interest or trends of concern.

We will look to do that by continuing to place questions on the YouGov tracker to both increase sample size and look at new questions, such as consumer shift from retail to online.

We will also seek further data from operators. This will seek understand what operators are doing and what they are seeing, for example around recognised consumer segments of potential concern, such as young men who play a number of products.

Finally, to maintain transparency, we will publish data and our findings on an ongoing basis.

\[1\] from the biggest operators, covering approximately 80% of the online gambling market, noting that it may include some duplication of customer numbers where it is not possible to identify unique customers
As part of our regular research programme, we publish a range of official statistics on consumer gambling participation and the prevalence of problem gambling. Official statistics are published on a quarterly basis from our telephone survey via an annual gambling behaviour report and via Health Surveys approximately every 2 years. These official statistics remain our most robust and trusted sources of gambling participation and problem gambling data.

However, the pre-defined timings of the surveys that contribute to our official statistics do not allow us to provide regular reports on the impact of Covid-19 at this time.

Therefore, in response to the Covid-19 outbreak, The Gambling Commission has commissioned questions on YouGov’s Covid-19 tracker, a weekly online survey of around 2,000 adults in Great Britain, which enables us to monitor key metrics including:

- Changes in gambling participation
- How many people are taking up gambling activities for the first time
- How many people are increasing the time or money they spend on gambling

The YouGov data is not being published as official statistics, but provides the Commission with a flexible way to add to our consumer evidence base via a weekly nationally representative survey. For more information on the methodology of the YouGov survey please see the data tables.

*Gambling Commission Industry statistics

It should be noted that:

- the first half of March (pre-lockdown) featured Cheltenham, a major event in the horse racing calendar, as well other sporting events, which have a major impact on the results of the data. This data therefore does not provide a full picture of the impact Covid-19 has had on the market.
- It is also worth considering that while we expect products to experience some organic growth year on year (y-o-y), the increases we have seen from the data in certain products goes above and beyond what can be
considered as organic year on year growth


[6] Players who have placed one or more bet / spin during the month

[7] The data shows that in March there was an 11% decrease active real event betting players, the magnitude of the decrease is likely to have been mitigated by the occurrence of Cheltenham and other sporting events, with virtual betting increasing by 88%, albeit from a lower base

[8] In the first wave (16-17 April) the last 4 weeks could include a short period pre-lockdown, but we do not think this point impacts the finding significantly. For clarity this also includes NL products.


[10] From Populus online tracker March 2020

[11] Growth in terms of the total number of bets / spins being placed or the number of active players by vertical

[12] We note that an element of product growth could be attributed to organic growth.

[13] By the engaged here we mean those who have participated in three or more gambling activities in the last 4 weeks. The sample size for this group is relatively low (n = 81), however, compared to all who have gambled in the last four weeks, the difference in the proportion who have increased the time or money they have spent is statistically significant.