

Market overview for August 2020 - operator data

The Gambling Commission has published further data showing how the easing of Covid-19 lockdown measures has impacted online and Licensed Betting Operator (LBO) gambling behaviour.

Online Betting

The online gambling data, collected from the largest online operators, covers the months March through to August.

Between July and August GGY decreased by a further 12% (to £406m), driven predominantly by a decrease in real event betting. This represents the second consecutive month on month fall in GGY since April.

Online real event betting

During June we reported on an apparent release of pent up demand for online betting after the easing of some lockdown restrictions and the reintroduction of several tier-one sports. The lack of tier-one sporting events in August appears to have impacted GGY for real event betting which decreased by 21% from July.

The number of bets (down by 12% from July) and the number of active players (down by 10% since July) have also both decreased.

This would indicate the reliance of real event betting on top-tier football, with the Premier League which ended in July having impacted figures in August.

Online slots

Slots remains the online product to have seen the smallest change from July. August is the second month in a row where the reported figures have not changed significantly, as GGY increased by 1% (to £164m), with both the number of bets (-1%) and the number of actives (-2%) decreasing slightly since July.

There has been a slight increase in loss per active figure for slots which has increased by nearly £2 since July and continues to remain meaningfully higher than any other online gambling product (£68 for slots versus £43 for real event betting and £35 for casino during August).

Consumer product engagement

The figure for those engaged in more than one activity is down from 41% in April to 33% in August.

Safer gambling indicators

The number of online slots sessions lasting longer than an hour decreased by 7% in the month to August (down to 1,612,123). The average session length remains steady at 21 minutes with around 8% of all sessions lasting in excess of 1hr.

Between July and August, the number of customer interactions undertaken rose by 11% (to 963,489). 4% of those interactions reported were direct contact from staff (down from 5% in July).

Offline Betting

The Commission has collected data from the largest Licenced betting operators (LBOs) for the months of March (pre-lockdown), June, July and August. It is worth noting that LBOs closed on 20 March and were given permission to re-open [\[1\]](#) from 15 June.

Absolute values are not directly comparable between these periods for several reasons including:

- Retail not in operation for a full month in March and June
- Phased openings; times and premises
- Local restrictions
- Impact of restrictions on other retail gambling sectors

GGY reported for the month of August has remained steady, while total bets & spins decreased both by 2% since July.

Over the Counter (OTC)

Activity over the counter increased in August and accounted for 43% of GGY from all bets & spins placed in LBOs, an increase of 6% from July.

Both GGY (14%) and number of bets (5%) also increased on the previous month.

Self-Service Betting Terminals (SSBT)

The number of bets places on SSBTs increased by 1% from July while GGY decreased by 29% during the same period.

SSBTs continue to account for 1% of bets / spins placed since the easing of lockdown, similar to pre-lockdown levels.

Machines sessions

Machines GGY decreased by 2% to just below £80m, which is 34% higher than March 20, although LBOs were only in operation until 20th March.

While spend per session has decreased by 13% to £10.39 since the initial re-opening of LBOs in June, it still remains higher than pre-lockdown of £8.72.

The number of spins per session decreased by 1% (to 125) between July and August.

Safer Gambling Indicators

3% of total sessions lasted more than an hour in June. While this decreased to slightly in August, it still remains above the pre-lockdown level. With operating restrictions in place in retail premises, this could be driven by availability of machines or consumer desire to not lose their spot.

This is early data which we are unable to triangulate with customer numbers but does indicate the potential for an increase in intensity of play and the need for operators to remain vigilant in line with the [Commission's guidance](#) and reminders set out to operators just before outlets were able to re-open.

As retail reflects new customer behaviour we could be seeing a mix of both displacement of activity from OTC to machines with consumers possibly wanting to limit contact with other individuals, and the return of only the most engaged individuals.

[\[1\]](#) Except Scotland

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