GAMBLING COMMISSION

Industry statistics

April 2016 to March 2019

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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.

£14.4bn

Total Gross Gambling Yield (GGY) of the Great Britain gambling industry
(April 2018 – March 2019) (0.3% decrease from April 2017 – March 2018)

£5.3bn

Total GGY for the remote sector
(April 2018 – March 2019) (0.6% decrease from April 2017 – March 2018)

102,782

Total number of employees in the Great Britain gambling industry
(March 2019) (5.5% decrease from March 2018)

£2.8bn

Total GGY for gaming machines in Great Britain
(April 2018 – March 2019) (0.5% increase from April 2017 – March 2018)
(excludes those requiring only a local authority permit)

10,761

Total number of Premises in Great Britain
(March 2019) (3.2% decrease from March 2018)

£2.1bn

Total GGY for remote casino category - Slots
(April 2018 – March 2019) (5.8% increase from April 2017 – March 2018)
(excludes those requiring only a local authority permit)

8,320

Total number of betting shops in Great Britain
(March 2019) (2.8% decrease from March 2018)

£1.1bn

Total GGY for land-based casinos in Great Britain
(April 2018 – March 2019) (10.3% decrease from April 2017 – March 2018)

£1.2bn

Total GGY for Category B2 machines in Great Britain
(April 2018 – March 2019) (30.6% decrease from April 2017 – March 2018)

£1.5bn

Contributions to good causes from The National Lottery
(April 2018 – March 2019) (1.5% decrease from April 2017 – March 2018)

£1.1bn

Total GGY for Category B3 machines in Great Britain
(April 2018 – March 2019) (91.0% increase from April 2017 – March 2018)

£332m

Contributions to good causes from large society lotteries
(April 2018 – March 2019) (11.0% increase from April 2017 – March 2018)

Executive summary

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, premises and people employed within the industry. It is based on data reported to us by the operators we licence and regulate.

An accompanying data file has more detail, including historical data back to 2009.

Total GGY for the industry was £14.4bn in the year April 2018 to March 2019. This represents a marginal decrease of £46.4m (-0.3%) on the previous year.

Remote (or online) gambling is the largest sector by GGY. With £5.3bn GGY, it comprises 37.1% of the overall market. Remote sector GGY decreased for the first time this year, by £34.2m (-0.6%). Online casino games dominate the sector, generating £3.1bn in GGY, mostly from slots games. GGY for remote betting totalled £2.0bn, led by football and horse betting.

Non-remote betting GGY remained stable and was the second largest sector by GGY with £3.2bn. GGY for on-course activities increased, while off-course and pool betting decreased. Within off-course data, machines GGY decreased for the first time in 10 years, by £2.1m. Machines represented 57.8% of total off-course GGY. Total betting premises have continued to decline for the fifth consecutive reporting period to 8,320.

National Lottery ticket sales increased by £271.6m to £7.2bn. This supported a GGY equivalent increase of £71.6m, to £3.1bn, making the National Lottery the third largest sector by GGY. Over the same period, the primary contribution to good causes decreased by £21.9m to £1.5bn.

The non-remote casino sector saw a decrease of £121.4m (-10.3%) in casino GGY, to £1.6bn. This was led by decreases in GGY from casino games (-13.4%), predominantly punto banco and American roulette. GGY from casino-based machines increased (+3.9%).

Non-remote bingo GGY decreased slightly to £677.0m (-0.5%).

Large society lotteries, which traditionally have the smallest market share along with arcades, saw a GGY equivalent increase to £541.6m (+6.6%), with balance to good causes at £332.2m, a £32.9m increase from the last reporting period. This is the highest contribution figure reported to date.

In the arcades sector, adult gaming centres showed a slight increase in GGY, reporting £379.3m (+3.2%). GGY for licensed family entertainment centres decreased, reporting £50.4m (-8.0%). Note that this data does not include unlicensed family entertainment centres which operate using a permit from a local authority.

Machines GGY over the last year to March 2019 increased in all sectors except betting and family entertainment centres. GGY increased in all machine categories, except B2 and D. Across all sectors, GGY from Category B2 machines decreased by £517.4m to £1.2bn (-30.6%) but it was still the highest machine category for GGY. It was closely followed by category B3 machines which have increased by £518.0m to £1.1bn (+91.0%).

Note that the change in regulations reducing maximum stakes from £100 to £2 for Category B2 machines did not take effect until April 2019, after the reporting period of this publication.

The number of licensed activities has decreased by 3.4% to 3,655. These are held by 2,690 operators (-4.6%).

The number of licensed gambling premises in Great Britain has fallen to 10,761 (-3.2%).

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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.

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For an explanation of GGY please click on this link.
For more detailed statistics relating to this summary, please refer to the Excel version within this link.

Industry overview

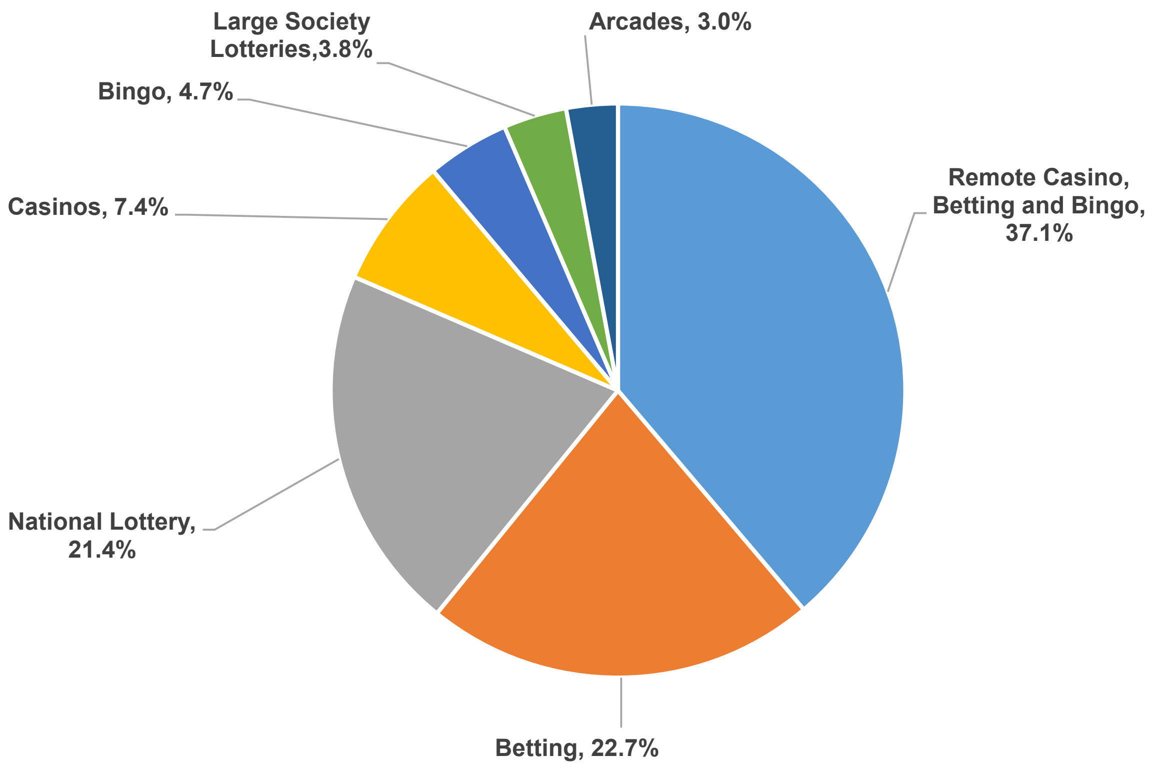
Gross gambling yield

During the period April 2018 to March 2019, the regulated gambling industry in Great Britain generated a gross gambling yield (GGY) or equivalent[1] of £14.4bn, a 0.3% decrease compared with the previous reporting period.

Table 1: Industry GGY by sector (£m)

Sector	Apr 2016-Mar 2017R	Apr 2017-Mar 2018R	Apr 2018-Mar 2019P	1 Year % Change
Arcades (non-remote)	424.93	422.12	429.65	+1.8
Betting (non-remote)	3,310.84	3,253.64	3,253.39	0.0
Bingo (non-remote)	684.28	680.11	677.04	-0.5
Casinos (non-remote)	1,163.54	1,180.58	1,059.23	-10.3
Remote casino, betting and bingo	4,775.18	5,355.33	5,321.11	-0.6
National Lottery[1] (remote and non-remote)	2,978.60	3,007.80	3,079.30	+2.4
Large Society Lotteries[1] (remote and non-remote)	442.43	508.11	541.58	+6.6
TOTAL	13,779.80	14,407.69	14,361.30	-0.3

Figure 1: Industry GGY by sector[2]

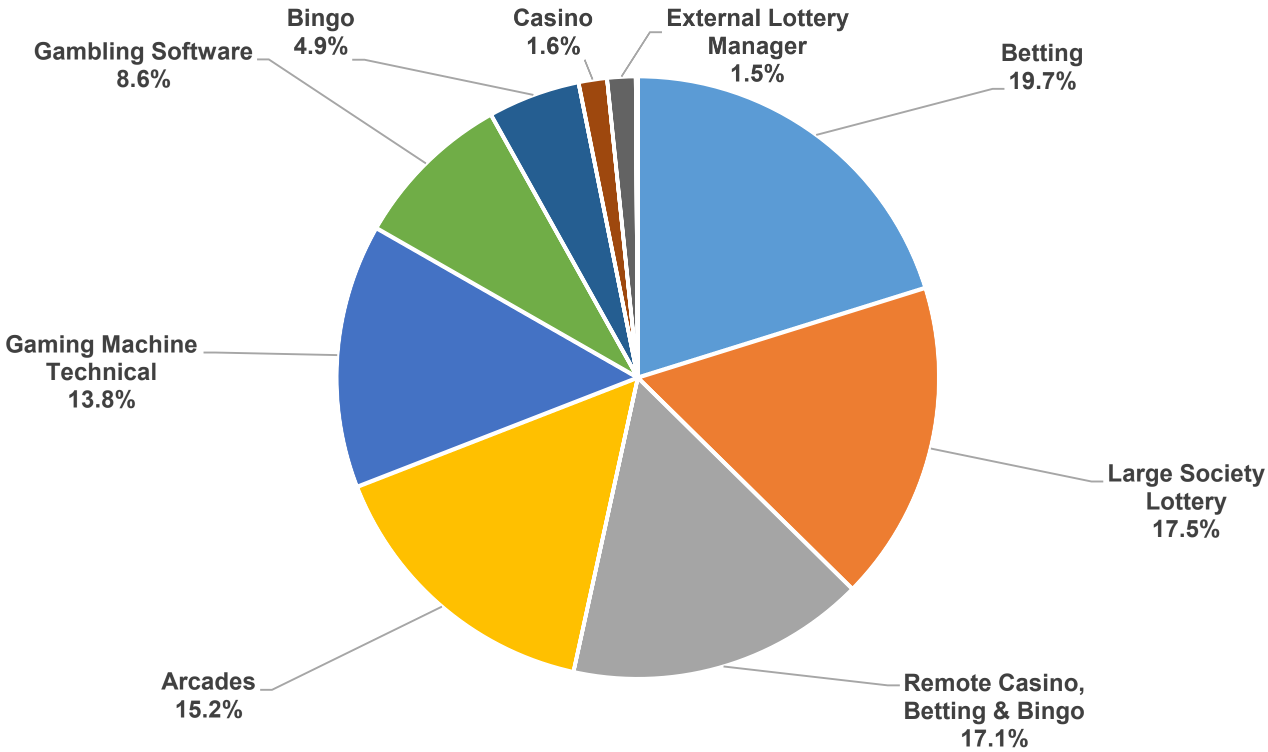


Licensed operators

As at March 2019 there were a total of 2,690 operators licensed by the Gambling Commission compared with 2,819 (-4.6%) at March 2018, 338 of which operate across more than one sector.

Between them, those operators held licences (remote and/or non-remote) that entitled them to conduct 3,656 activities compared with 3,782 (-3.4%) at March 2018.

Figure 2: Licensed activities held by sector



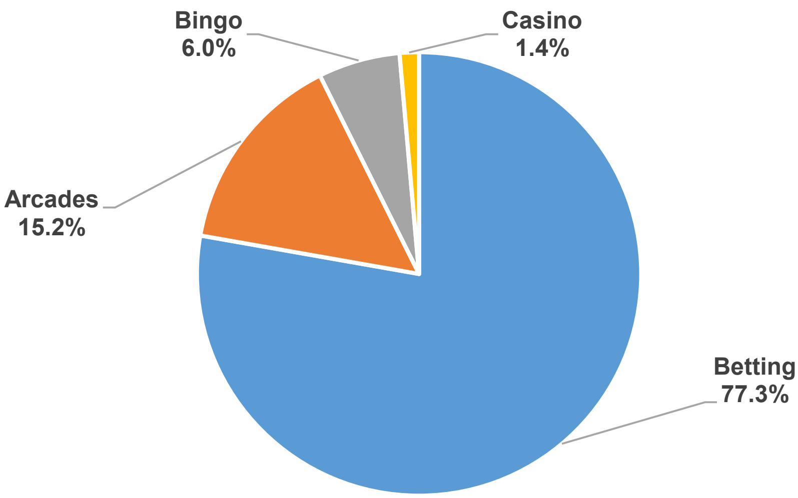
Gambling premises

Across Great Britain, there were 10,761 gambling premises used by licensed operators in March 2019, compared with 11,115 (-3.2%) at March 2018

Figure 3: Premises used by non-remote licensed operator

Licensing authority premises

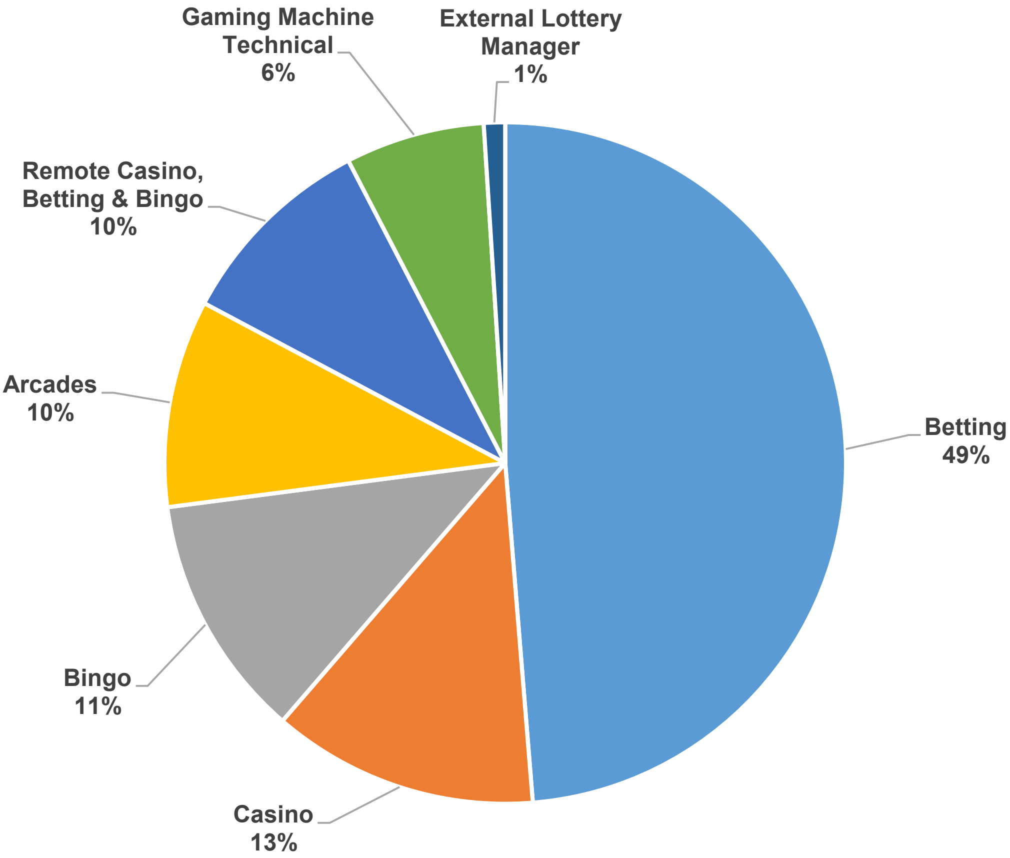
In addition to premises used by licensed operators, there were 51,541 premises where gambling is permitted and controlled by licensing authorities. Data on non-Commission licensed premises can be found in [Licensing authority statistics.]



Workforce

In reliance of their licensed activities, operators as at March 2019 reported 102,782 people employed, compared with 108,820 (-5.5%) at March 2018

Figure 4: Workforce by sector[3]



Notes

[R] Previously published data revised.

[P] Provisional new data.

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

[2] GGY is not included in this chart from Gaming Machine Technical or Gambling Software sectors as they are business-to-business only. Also, External Lottery Manager (ELM) figures are not included as the GGY-equivalent for these is contained within the Society Lottery sector figures.

[3] Excludes Gambling Software and National Lottery.

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:
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