

Gambling Trends - UK - 2022

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This report looks at the following areas:

- The impact of COVID-19 and the cost-of-living crisis on gambling habits
- Threats and opportunities emerging from the government's Gambling Act review
- Operators pivoting towards recreational play
- The use of technology in creating new gambling experiences – online and in venues
- The potential of smartphones to attract more female players
- Opportunities to engage the esports and video gaming crowd.

The UK gambling market is expected to have recovered to approaching pre-pandemic value in 2021/22, with consumer expenditure estimated to have risen 12% year on year to around £14.4 billion.

Rapidly rising inflation and labour market shortages are causing problems in the retail segment by raising costs for high street gambling businesses, many of which are already only marginally profitable. Gambling expenditure in general is historically resilient to economic downturns, although lotteries are considered more vulnerable to cutting back than other verticals.

The biggest threat the market faces beyond the cost-of-living crisis is posed by the government's review of gambling regulation, which threatens a wide range of new restrictions for online businesses, potentially including stake limits, affordability checks and a ban on direct marketing and inducements to play.

The biggest opportunity lies in operators' response to this threat and specifically their focus on growing their recreational customer base through softer, more entertainment-led strategies.



"The market is making a strong recovery from the COVID-19 pandemic but is likely to have its wings clipped by new remote sector restrictions driven by player safety concerns. Operators will respond by targeting more recreational customers with an entertainment-led approach."

– David Walmsley, Senior Leisure Analyst – June 2022

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