Gambling Trends - UK - 2022

Report Price: £2195 | $2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | $2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

EXECUTIVE SUMMARY

ISSUES AND INSIGHTS

MARKET SIZE AND PERFORMANCE

- **Inflation threatens recessionary resilience**
  Figure 23: Consumer concerns about household finances, 2021-22
- **New networks open new opportunities**
  Figure 24: Participation in video gaming, by generation, 2021
- **Responsible gaming focus favours more recreational play**
  Figure 25: Proportion of gamblers with problematic playing habits, 2017-21

REGULATORY AND LEGISLATIVE CHANGES

- **Gambling Act review approaches conclusion**
- **Latest rule changes target virtual slots and celebrity advertising**

MARKET SHARE

- **Mergers and acquisitions continue apace**
  Figure 26: UK revenues of leading gambling operators, 2021

LAUNCH ACTIVITY AND INNOVATION

- **Allwyn victorious in National Lottery race**
- **Entain rolls out first VR experiences**
- **New bingo venues focus on flexibility, community and entertainment**
- **Free play pays its way**
- **Bingo goes clubbing**

ADVERTISING AND MARKETING ACTIVITY

- **Betting brands' battle resumes**
  Figure 27: Main monitored media advertising spend of UK gambling operators, by segment, 2019-21
- **Lotteries lead on TV exposure**
  Figure 28: Main monitored media advertising spend of UK gambling operators, by media type, 2019-21
- **Nielsen Ad Intel coverage**

GAMBLING ACTIVITIES

- **Gamblers play on through pandemic**
  Figure 29: Participation in gambling activities, 2022

GAMBLING DEVICES

- **Smartphone gambling proves female-friendly**
  Figure 30: Devices used to gamble online, 2022
- **Repertoires expand to take in games consoles**
  Figure 31: Gambling device repertoires, 2022

Report Price: £2195 | $2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **mintel.com.**