

Gambling Trends - UK - 2023

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This report looks at the following areas:

- The impact of the cost of living crisis on gambling spending and participation
- Threats and opportunities presented by proposed changes in gambling regulation
- Variations in playing habits between products and across channels
- Support for tighter regulation of gambling and its promotion
- Strategies for promoting recreational play.

Despite the majority of market value now being generated remotely, gamblers still like to play in person, with 65% participating both in venues and online.

The cost of living crisis has slowed the retail segment's recovery from the COVID-19 pandemic and endangers the more marginal venues that are least able to absorb rising energy and staffing costs.

The other major threat to market value is posed by the negative revenue effects of proposed new restrictions on remote play that will be felt over the next 2-3 years, although these will be softened slightly by some new freedoms for venues.

Operators are already responding to tighter remote regulation by switching focus to lower-spending 'recreational' players. This pivot is creating growth opportunities for those that can build their product development and marketing strategies around the media and entertainment formats that are key to reaching this new type of customer.



"A combination of digital technologies, social experiences, a leaner estate and new regulatory freedoms is offering retail gambling a brighter future than it had in prospect pre-pandemic."

– **David Walmsley, Senior Leisure Analyst**

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