GAMBLING COMMISSION

# Industry statistics

## April 2015 to March 2018

GAMBLING COMMISSION

# Contents

# Headline findings

The headline findings in this report indicate areas of interest across the industry or within each sector, highlighting large percentage changes or changes in trends.

**£14.4bn**

Total Gross Gambling Yield (GGY) of the Great Britain gambling industry
(Apr 2017 – Mar 2018) (4.5% increase from Apr 2016 – Mar 2017)

**£5.4bn**

Total GGY for the remote sector
(Apr 2017 – Mar 2018) (13.7% increase from Apr 2016 – Mar 2017)

**£2.0bn**

Total GGY for the remote casino category - slots
(Apr 2017 – Mar 2018) (19.3% increase from Apr 2016 – Mar 2017)

**£1.5bn**

Contributions (to good causes) from The National Lottery
(Apr 2017 – Mar 2018) (1.5% increase from Apr 2016 – Mar 2017)

**£296m**

Contributions to good causes from large society lotteries
(Apr 2017 – Mar 2018) (15.7% increase from Apr 2016 – Mar 2017)

**107,940**

Total number of employees in the Great Britain gambling industry
(Mar 2018) (0.6% increase from Mar 2017)

**37.3%**

Market share of the remote sector
(Apr 2017 – Mar 2018) (3.0% increase from Apr 2016 – Mar 2017)

**8,406**

Total number of betting shops in Great Britain
(Sep 2018) (1.8% decrease from Mar 2018)

**644**

Total number of bingo premises in Great Britain
(Sep 2018) (1.7% decrease from Mar 2018)

**152**

Total number of casinos in Great Britain
(Sep 2018) (same as Mar 2018)

**1,606**

Total number of licensed arcades in Great Britain
(Sep 2018) (6.1% decrease from Mar 2018)

**181,309**

Total number of gaming machines in Great Britain
(Apr 2017 – Mar 2018) (0.5% decrease from Apr 2016 – Mar 2017)
(excludes those requiring only a local authority permit)

# Executive summary

Industry statistics provide analysis of the gambling industry in Great Britain. Aggregated information is presented by sector, which includes data on gaming machine numbers and their Gross Gambling Yield (GGY), employee numbers and social responsibility activities.

This report reflects headline findings that describe the current gambling market and is accompanied by a detailed data file.

The GGY for the industry was £14.4bn in the year April 2017-March 2018, as reported by operators licensed and regulated by the Gambling Commission. The gambling industry demonstrates continued growth in most sectors with the exception of non-remote betting.

Remote gambling (mostly online) is the largest sector by GGY. It has been regulated on a point of consumption basis in Great Britain since November 2014. This sector constitutes 37% of the overall market with £5.39bn GGY (13.7% increase). Within the remote sector, casino games have generated £3.0bn in GGY, predominantly through slots games (£2.0bn). GGY for remote betting totals £2.3bn and is dominated by football and horse betting.

Betting GGY has decreased by £137.6m currently totalling £3.25bn to make it the second largest sector by GGY. GGY for off-course, machines and on-course betting activities declined by £101.0m, £37.7m and £0.6m respectively over the last year whilst pool betting increased by £1.6m during the same period. Machines GGY currently represents 57.9% of the total off-course GGY. Total betting premises have declined for the fifth consecutive year to 8,406.

The National Lottery share of GGY has increased by £29m to £3.0bn (1.0% decrease), making it the third largest sector. National Lottery primary contributions to good causes increased by 1.5% to £1.5bn.

Bingo sector GGY remains steady at £688.3m, 47.4% of which is derived from machines.

The casino sector has seen an increase of £27.2m in casino games GGY, from £956.9m to £984.0m, led by Punto Banco which has risen by £58.4m to £244.6m. American Roulette, Blackjack and Other have all seen a decrease. Electronic gaming, a growth area within casinos, has seen a year-on-year increase and currently stands at £171.4m.

In the arcades sector, Adult Gaming Centres show a slight increase in GGY, now reporting £361m, up from £356m last year. Increases can be seen in Category B3, C and D machines. GGY for licensed Family Entertainment Centres has decreased, now reporting a GGY of £57m. Note that this data does not include Unlicensed Family Entertainment Centres which operate using a permit from the Local Authority.

Large society lotteries, traditionally the smallest market share along with arcades, have seen a GGY equivalent increase to £502.9m (13.7% increase), with balance to good causes at £296m (15.7% increase), the highest reported to date.

The overall number of gaming machines across the industry has decreased by 0.5% to 181,309. Bingo, Adult Gaming Centres and Casinos have seen an increase in machine GGY as have categories B1, B3 and B4 across all sectors. Betting shops continue to generate the highest machines GGY at £1.78bn. Across all sectors, B2 machines have generated £1.73bn, representing the highest category for GGY.

# Preface

This report provides statistics on the regulated gambling industry in Great Britain (GB) for the period April 2015 to March 2018. An update report to cover up to September 2018[1] is scheduled to be published in May 2019.

The statistics cover gambling across the betting, bingo, casino, arcades and lotteries sectors (including The National Lottery)[2].

Data has been collated by the Gambling Commission and is drawn from regulatory returns and lottery submissions submitted by licensed operators and additional information provided by operators through correspondence with the Commission.

The methodology for producing this report is consistent with Official Statistics guidelines (see Appendix 1 for more detail).

Further statistics and information relating to GB gambling are available from the Statistics and Research section of our website.

**For full data tables and graphs (including data for earlier periods), refer to the Excel version of Industry statistics on the Gambling Commission website.**

[1] Where September 2018 data is already known, it is included in this report.
[2] Spread betting is not included, as the Commission is not responsible for regulating this activity.

# Industry overview

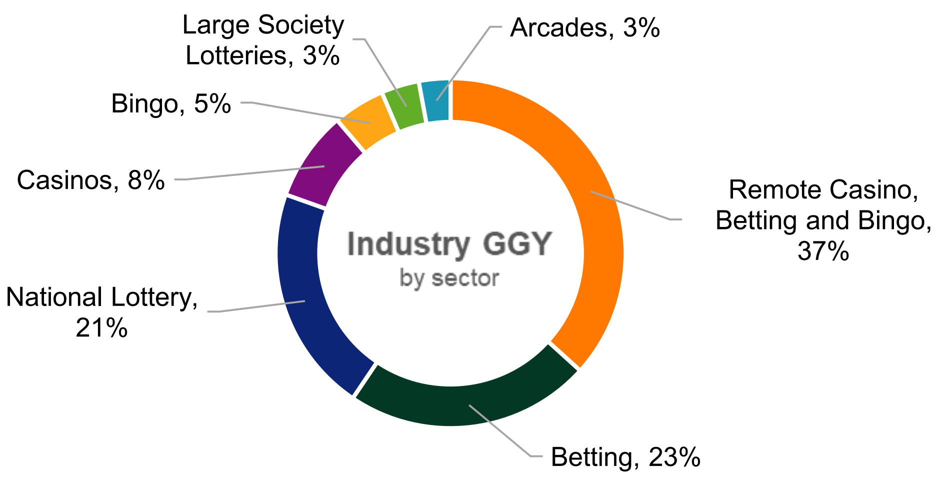
## Gross gambling yield

During the period April 2017 to March 2018, the regulated GB gambling industry generated a gross gambling yield (GGY) or equivalent[3] of £14.4bn, a 4.5% increase compared with the year prior.

**Table 1: Industry GGY by sector (£m)**

| Sector | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| **Arcades** (non-remote) | 418.06 | 421.64 | 417.98 |
| **Betting** (non-remote) | 3,318.19 | 3,391.79 | 3,254.17 |
| **Bingo** (non-remote) | 693.11 | 687.24 | 688.29 |
| **Casinos** (non-remote) | 999.38 | 1,163.54 | 1,191.22 |
| **Remote casino, betting and bingo** | 4,230.76 | 4,742.80 | 5,391.79 |
| **National Lottery** (remote and non-remote) | 3,416.80 | 2,978.60 | 3,007.70 |
| **Lotteries** (remote and non-remote) | 379.77 | 442.34 | 502.87 |
| **Total** | **13,456.05** | **13,827.95** | **14,454.01** |

**Figure 1: Industry GGY by sector**




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

## Licensed operators

As at 31 March 2018 there were a total of 2,820 operators licensed by the Gambling Commission, 360 of which operate across more than one sector.

Between them, those operators held licences (remote and/or non-remote) that entitled them to conduct 3,758 activities (2.3% increase on the previous period).

## Gambling premises

Across GB, there were 10,808 gambling premises used by licensed operators in September 2018. This is a decrease of 266 (2.4%) since March 2018.

**Figure 3: Premises by non-remote sector**

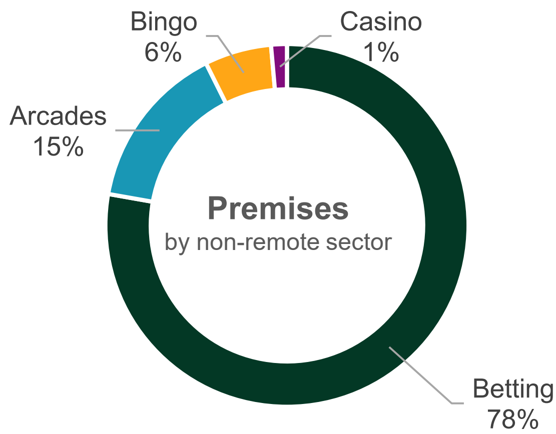
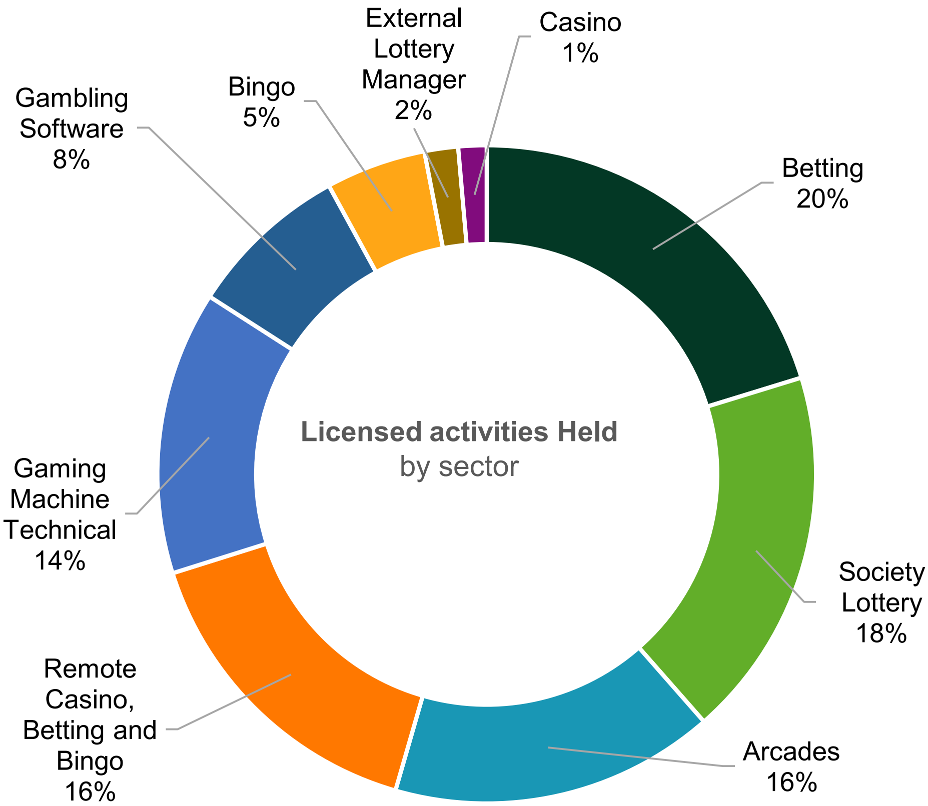



**Figure 2: Licensed activities held by sector**




## Licensing authority premises

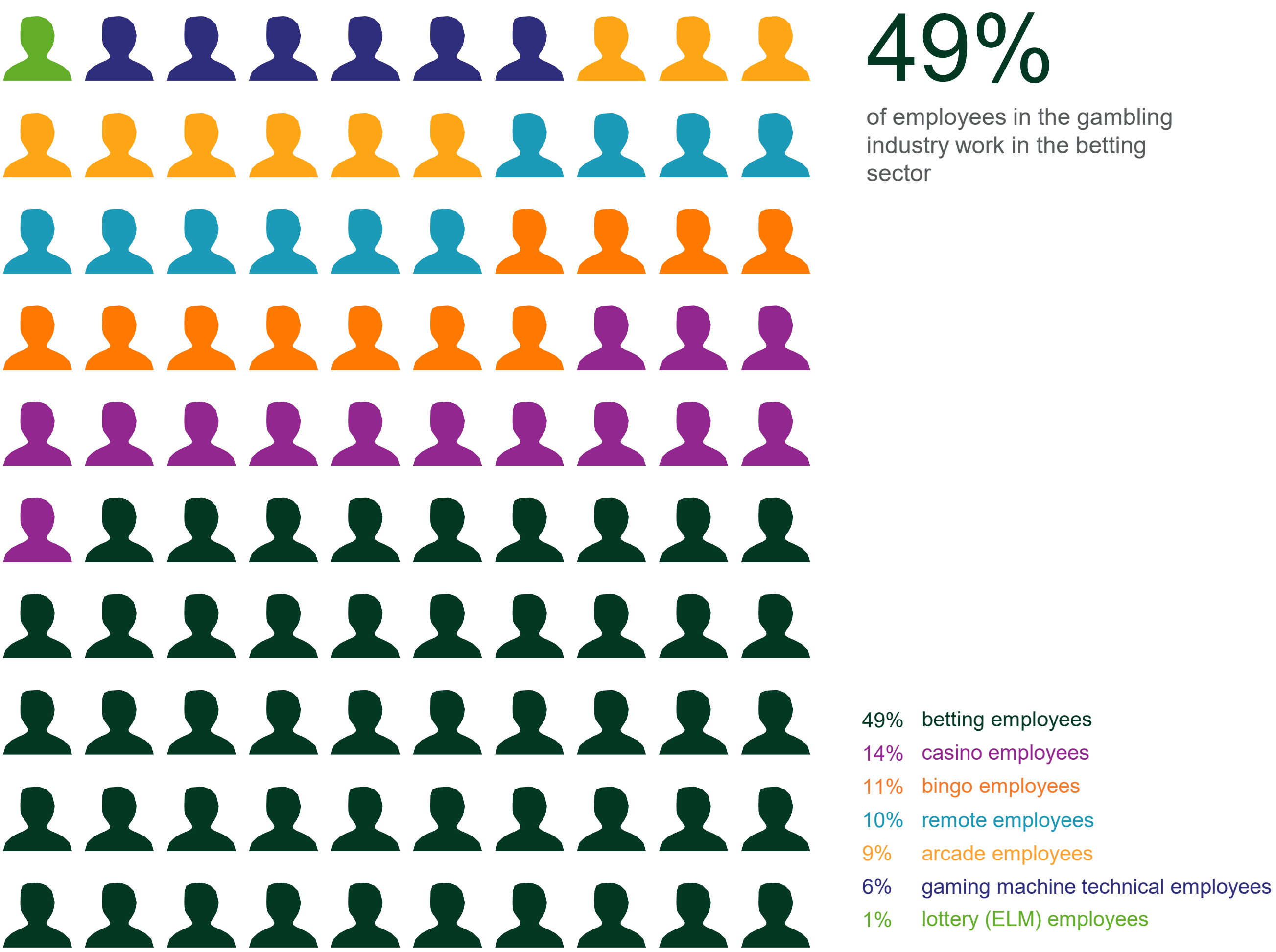
In addition to premises used by licensed operators, there were 52,292 premises where gambling is permitted and controlled by licensing authorities. Data on non-Commission licensed premises can be found in **Licensing authority statistics.**

## Employment

The number of people working in the gambling industry was 107,940 (as at 31 March 2018) (0.6% increase on the previous reporting period). The largest increase was in the remote sector.

**Table 2: Number of employees across all gambling sectors[4]**

| Employees | As at 31 Mar 2016 | As at 31 Mar 2017 | As at 31 Mar 2018 |
|---|---|---|---|
| Betting | 53,303 | 52,359 | 53,029 |
| Bingo | 12,831 | 12,474 | 12,348 |
| Casino | 16,352 | 16,417 | 15,226 |
| Arcades | 10,694 | 10,487 | 9,780 |
| Gaming machine technical[5] | 6,661 | 6,773 | 6,346 |
| Lotteries (External Lottery Managers only) | 1,131 | 996 | 938 |
| Remote | 6,373 | 7,813 | 10,273 |
| **Total** | **107,345** | **107,319** | **107,940** |




4 Employee headcount are drawn from the latest regulatory return submitted by operators on or before 31 March 2018. Full time and part time employees are included in these figures.
5 The employee numbers for gaming machine technical (GMT) include headcount from all of the GMT licensed activities (including manufacturers, suppliers and software manufacturers).

## Gaming machines

The average total of gaming machines across all non-remote gambling sectors in GB (in premises used by licensed operators only[6]) during the period April 2017 to March 2018 was 181,309 (a decrease of 0.5% compared to the previous period).

Category B2, B4 and D machine numbers have declined, whilst Category B1, B3 and C numbers have increased.

Category C machines were the most prevalent category of machine, representing 45.4% of all machines. The introduction and widespread use of electronic bingo terminals[7] (EBTs) within the bingo sector accounts for most of the increase in Category C machines.

Category D and Category B2 machines were the second and third most prevalent machine types; together accounting for a further 39.1%.

Across GB, 80.1% of all gaming machines were in the bingo and arcade sectors.

**Table 3: Gaming machine numbers across all regulated gambling sectors (average)[8]**

| Machine category | Casino | Betting | Bingo | Arcades | Total |
|---|---|---|---|---|---|
| B1 | 3,034 | | | | **3,034** |
| B2 | 170 | 32,786 | | | **32,956** |
| B3 | - | 72 | 14,286 | 10,453 | **24,811** |
| B4 | - | - | 160 | 47 | **207** |
| C | - | 17 | 49,837 | 32,423 | **82,278** |
| D | - | - | 8,578 | 29,446 | **38,024** |
| **Total** | **3,204** | **32,875** | **72,861** | **72,368** | **181,309** |

The total GGY for gaming machines was £2.7bn (1.3% decrease compared to the previous period); representing 19.0% of total industry GGY. There were marginal differences in most categories when comparing to the previous reporting period. Category B2 showed a decrease of 5.8% and B3 an increase of 23.0%.

B2 Category machines accounted for 63.2% of the total machines GGY (which equates to 12.0% of total industry GGY).

Across GB, 62.7% of GGY from gaming machines was generated from the non-remote betting sector.

**Table 4: Gaming machine GGY across all gambling sectors (£m)**

| Machine category | Casino | Betting | Bingo | Arcades | Total |
|---|---|---|---|---|---|
| B1 | 193.23 | | | | **193.23** |
| B2 | 13.95 | 1,713.85 | | | **1,727.81** |
| B3 | 0.00 | 69.99 | 213.69 | 207.34 | **491.01** |
| B4 | - | - | 1.73 | 0.40 | **2.13** |
| C | | 0.47 | 95.28 | 131.28 | **227.04** |
| D | - | - | 15.37 | 78.96 | **94.33** |
| **Total** | **207.18** | **1,784.31** | **326.07** | **417.98** | **2,735.55** |

6 The Commission does not license pubs, clubs, working men's clubs or unlicensed family entertainment centres (UFECs) operating under a Local Authority permit. Consequently, the figures do not represent activity in those sub-sectors. Data on machines in non-Commission licensed premises can be found in Licensing authority statistics. See Appendix 3 for information on gaming machine categories and entitlements

7 EBTs are devices that enable a player to participate in bingo electronically and they can choose to purchase a larger number of tickets than they would usually be able to handle from playing on paper. EBTs can also contain other gambling related content such as slot games. Originally introduced to the market containing Category D content, evidence indicates that a number of the EBTs now operate with Category C and Category B3 content.

8 Gaming machine numbers fluctuate during the year and as such operators are required to provide their average number of machines.

## Social responsibility

Operators have a duty to report various social responsibility related activity to the Commission. The table below contains activity reported during the period April 2017 to March 2018.

Annual comparisons relating to the individual sectors can be found on the Excel version of Industry statistics.

**Table 5: Social responsibility overview**

| Sector | Self-exclusions[9] | Breaches of self-exclusions[10] | Opting to return following self-exclusion | Underage challenged on entry[11] | People who having gambled were unable to verify their age |
|---|---|---|---|---|---|
| Arcades | 2,639 | 403 | 871 | 31,934 | 1,515 |
| Betting | 42,130 | 18,409 | 5,287 | 215,231 | 15,151 |
| Bingo | 1,308 | 373 | 696 | - | 233 |
| Casino | 6,732 | 3,082 | 4,399 | 78 | 40 |
| Remote | 1,382,857 | 98,896 | 66,752 | - | 72,033 |
| **Total** | **1,435,667** | **121,163** | **78,005** | **247,243** | **88,971** |

9 The number of people who have self-excluded and the number of people who have cancelled their self-exclusion may be lower than these figures because individuals may have self-excluded from more than one venue or operator and therefore been counted more than once.

10 Known breaches of self-exclusion includes the number of times any self-excluded customer has attempted to gain access to facilities, attempted to gamble (for example, attempting to use an internet betting account following self-exclusion), or actually gambled. It is not limited to an attempt to gamble, and includes attempts to enter premises or access online gambling facilities.

11 The number of occasions upon which a person was unable to verify their age when challenged, after entering the premises. Children are allowed in FEC and Bingo premises.

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# Remote

# Remote

## Overview

Remote gambling is gambling in which persons participate by the use of remote communication; typically via the internet (accessed via computers, tablets and smart phones), telephone, or television.

The data in this section relates to the remote gambling sector in GB after the implementation of the Gambling (Licensing and Advertising) Act 2014, which came into force on 1 November 2014.

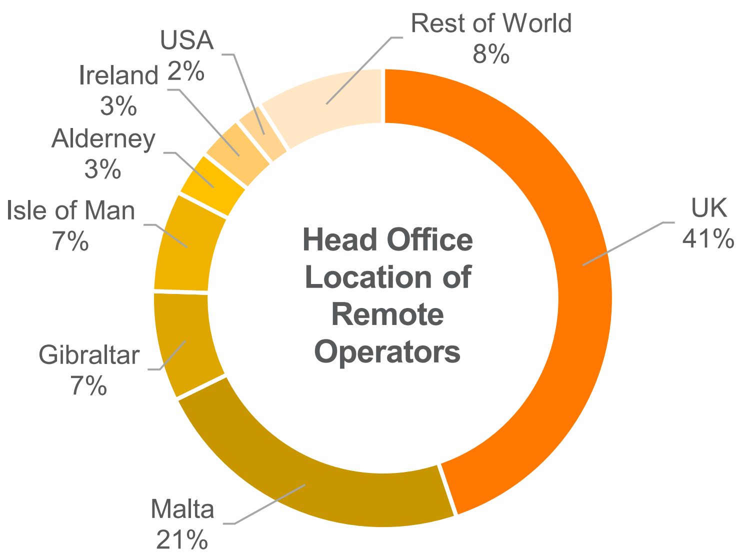
It provides data from GB based and non-GB based operators supplying remote gambling services to customers physically located in GB.

As of 31 March 2018, the total quantity of activities permitted in relation to remote gambling licenses issued was 888; an increase of 13.8% on the previous period. Gambling software and remote casino licences accounted for 56.1% of all remote activities licensed.

**Table 6: Remote gambling activities licensed by the Commission**

| Licensed activity | As at 31 Mar 2016 | As at 31 Mar 2017 | As at 31 Mar 2018 |
|---|---|---|---|
| Betting Intermediary | 16 | 17 | 21 |
| Betting Intermediary - Trading Rooms Only | 6 | 5 | 5 |
| Bingo | 54 | 54 | 57 |
| Casino | 180 | 187 | 200 |
| Gambling Software[12] | 241 | 254 | 299 |
| General Betting Limited (telephone only) | 23 | 21 | 19 |
| General Betting Standard - Real Event | 95 | 104 | 125 |
| General Betting Standard - Virtual Event | 42 | 47 | 63 |
| Pool Betting | 87 | 91 | 99 |
| **Totals** | **744** | **780** | **888** |

**Figure 4: Remote licences held by (head office) location**




Operators whose Head Office is based in the UK held the largest share of remote gambling activities (41%), followed by Malta (21%) and Gibraltar and the Isle of Man (7% each).

12 Includes both remote and non-remote licenses. Supply of services is on a business to business basis.

## Remote operators GGY

Total GGY from remote gambling by GB customers was £5.35bn from April 2017 to March 2018 (excluding remote National Lottery and large sector lotteries)[13]. This represented 37% of the total industry GGY.

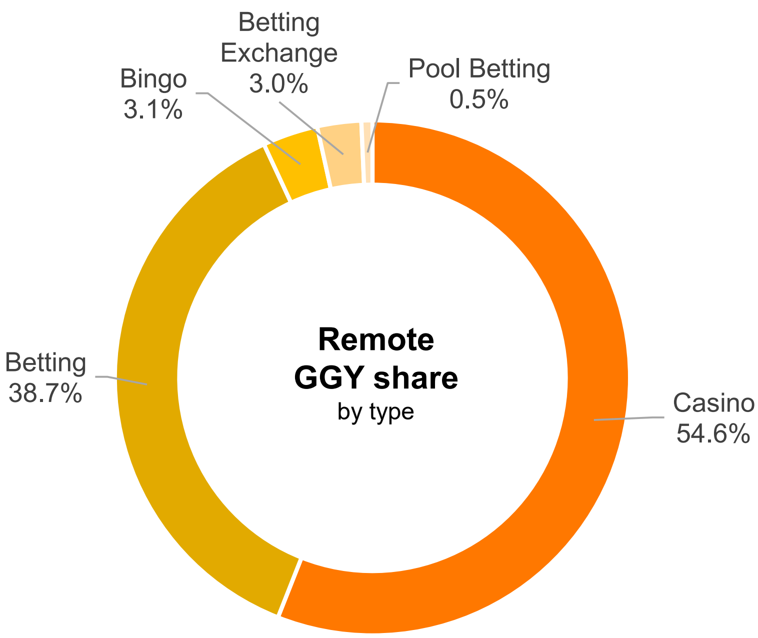
The total sector GGY was comprised of £2.68bn proprietary GGY (50.2%) and £2.67bn revenue share GGY[14] (49.8%).

**Table 7: GGY from remote gambling activities for GB customers only (£m)**

| | Proprietary GGY | Revenue share GGY | Total GGY |
|---|---|---|---|
| Betting | 1,510.56 | 562.33 | **2,072.89** |
| Betting Exchange | 160.61 | - | **160.61** |
| Bingo | 73.76 | 91.04 | **164.80** |
| Casino | 913.48 | 2,010.58 | **2,924.05** |
| Pool Betting | 25.98 | 2.71 | **28.69** |
| **Totals** | **2,684.38** | **2,666.65** | **5,351.04** |

Remote casino activities (54.6%) and remote betting (38.7%) generated the most GGY as a share of the total; collectively accounting for 93.4% of remote GGY. Remote bingo games, betting exchange and pool betting made up the remaining 6.6% GGY share.

**Figure 5: Remote market share by total GGY (for GB customers only)**




13 Since 1 November 2014 the Commission has been collecting GGY derived from revenue share agreements between licensed operators. To mitigate against the risk of double counting this revenue, the Commission requires operators to report only their relevant portion of the revenue share. Business to business operators are not required to submit the wagered or pay-out amount of a product meaning this information is reported to the Commission once, by the business-to-customer operators. Details of this arrangement can be seen in the remote regulatory returns consultation responses, relevant sections are contained within Annex A. The Commission is working with operators to ensure reported data complies with regulatory return requirements. Figures for the total regulated market (the GB market plus overseas customers) can be found in the Industry Statistics – MS Excel document.

14 Revenue share is defined as GGY which is subject to a contractual arrangement to be shared between two or more Commission licensed operators.

## Remote casino GGY

Slots activities accounted for £2.01bn (69.1%) of total remote casino GGY. Table games when combined with Roulette[15] generated the second highest GGY, £397m (14.5%). The remote casino GGY was comprised of £901.9m proprietary GGY (31.0%) and £2.01bn revenue share GGY (69.0%).

**Figure 6: Remote casino gambling activities GGY share (£m) (for GB customers only)**

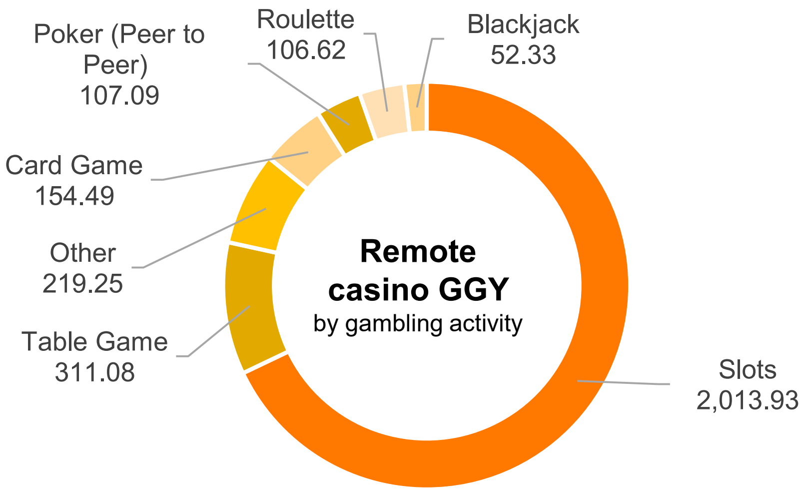
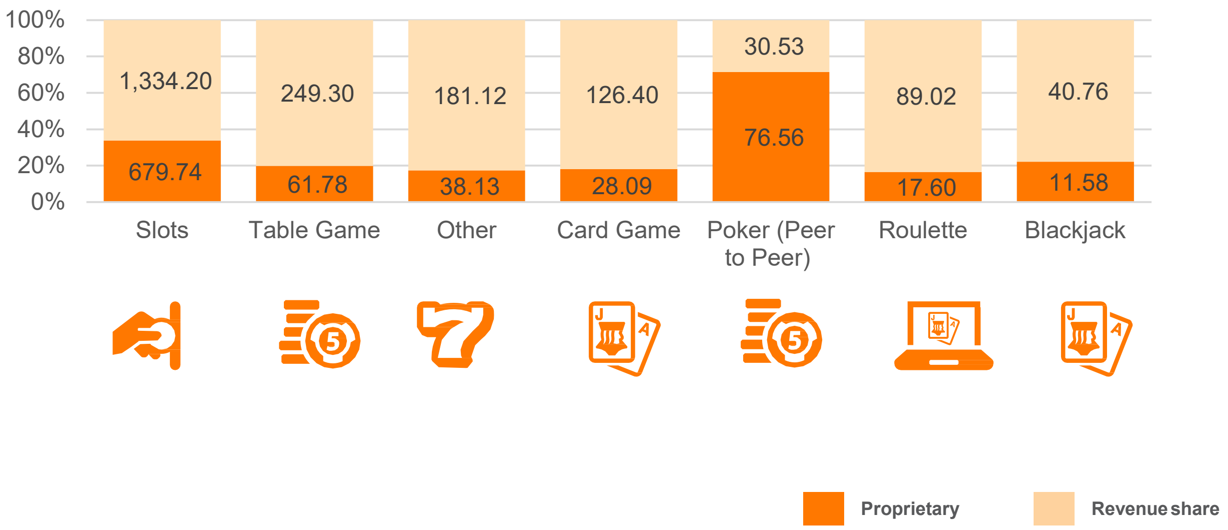



**Figure 7: Remote casino gambling activities GGY by propriety and revenue share (£m) for GB customers only**

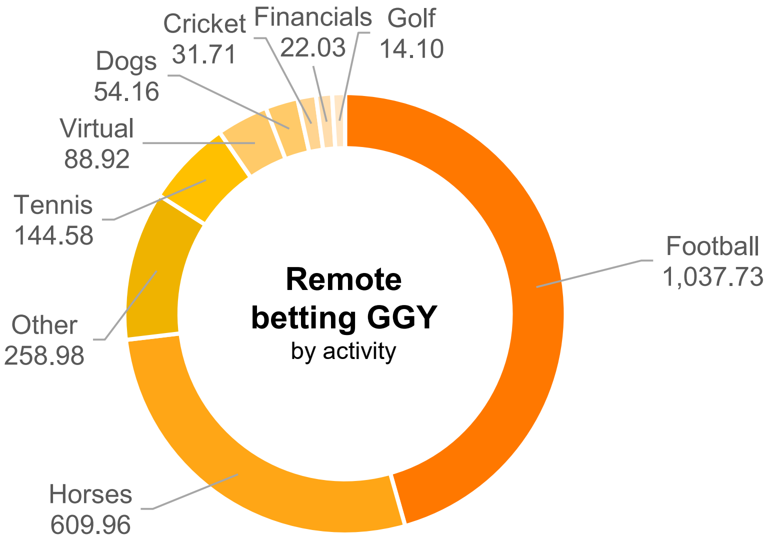



15 As of April 2018 'Table Game' & 'Card Game' was replaced with 'Roulette' & 'Blackjack' respectively. Whilst there is crossover of reporting periods, the relative activities will remain separate.

## Remote betting GGY

Football betting accounted for 45.9% of total remote betting GGY. Horse racing generated 27.0%. 'Other' generated 11.4%. Golf, dog racing, tennis, cricket, virtual and financials betting comprised 15.7% GGY share.

**Figure 8: Remote betting activities GGY share (£m) (for GB customers only)**




## Customer accounts across remote casino, bingo and betting operators

There were 33.58m active customer accounts in the remote sector, across remote casino, bingo and betting operators. Within the same period, there were 35.39m new account registrations. Within these customer gambling accounts, £784.77m worth of funds was held by remote operators (GB only)[16].

**Table 8: Customer account information[17, 18]**

| Commission licensed activity | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Active accounts (m) | 23.05 | 29.73 | 33.58 |
| New account registrations (m) | 23.94 | 30.94 | 35.39 |

## Gambling software[19]

Total revenue from operators holding a gambling software licence was £774.29m this period (April 2017 to March 2018).

**Table 9: Gambling software income (£m)[20]**

| Revenue type | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Sales | 181.48 | 202.69 | 275.17 |
| Revenue share | 356.09 | 311.86 | 275.35 |
| Other | 70.88 | 154.51 | 223.76 |
| **Total revenue** | **608.45** | **669.05** | **774.29** |

16 Customers gambling on betting exchanges tend to maintain a significant balance in their account as they need to have sufficient funds to cover the liabilities of their bets, rather than just have sufficient funds to cover the stake of the bets they intend to make.

17 Active customers are those that have been used by customers in the last 12 months. New registrants includes new individual customer registrations that occurred during the period, but may not have gambled.

18 Customers may have accounts with more than one operator and therefore the data relates to accounts rather than the individuals.

19 Following the update on Gambling Software Licences, which came into effect on 31 March 2015, the figures change significantly once we received the first set of data from new operators (after April 2016). For a full split of revenues, involving revenue share (including the income generated from gambling software provided to organisations, for which royalties are received), see the Industry Statistics – MS Excel document. These figures are based on annual returns.

20 Following an industry consultation, the Commission revised the way it collects data on gambling software and no longer collects income by software type. The amount of income detailed is for transactions between operators on a business to business arrangement. Gambling software is defined by the Gambling Act 2005 as computer software that is used in connection with remote gambling (including online gambling) but does not include anything for use solely in connection with a gaming machine.

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# Betting

# Betting

## Overview

The non-remote betting industry is made up of off-course, on-course and pool betting operators.

As of 31 March 2018, there were 210 operators licensed for the activity non-remote general betting standard (off-course), a 10.6% decrease since 31 March 2017.

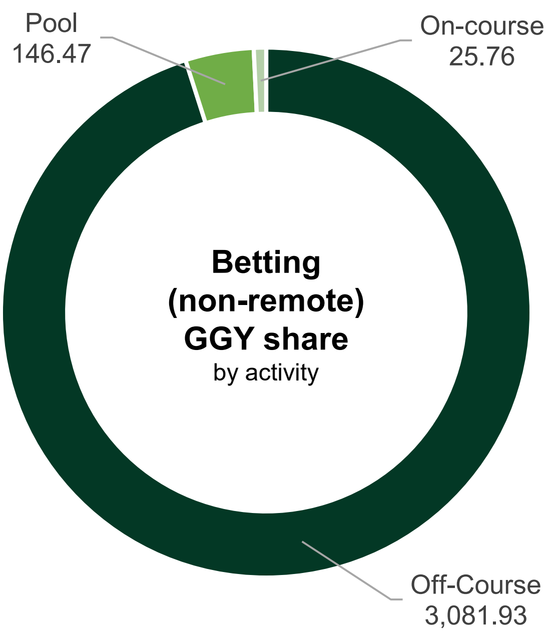
During the same period, the number of operators licensed for the activity non-remote general betting limited (on-course), fell by 0.9% to 528.

There were also 23 operators licensed for the activity non-remote pool betting; 3.0% of the total amount of licensed activities for betting operators.

Total GGY from the non-remote betting sector was £3.25bn from April 2017 to March 2018. This represented 22.5% of the total industry GGY.

Of the total GGY, 94.7% was for off-course, 4.5% was for pool and 0.8% was for on-course.

Figure 9: Betting (non-remote) GGY share (£m)



## Off-course betting

The total quantity of GB off-course betting premises (betting shops) was 8,406 as at 30 September 2018 (a decrease of 1.8% compared to the previous period).

The GB non-remote betting sector is dominated by four operators, which collectively account for 87.0% of all betting shops.

**Table 10: Number of betting shops by operator**

| Organisation | As at 31 Mar 2017 | As at 31 Mar 2018 | As at 30 Sep 2018 | % of total 30 Sep 2018 |
|---|---|---|---|---|
| William Hill | 2,339 | 2,289 | 2,282 | 27.1% |
| Ladbrokes | 1,945 | 1,894 | 1,849 | 22.0% |
| Betfred | 1,680 | 1,667 | 1,644 | 19.6% |
| Gala Coral | 1,637 | 1,591 | 1,540 | 18.3% |
| Other operators | 1,210 | 1,116 | 1,091 | 13.0% |
| **Total** | **8,811** | **8,557** | **8,406** | **100%** |

## Off-course betting: gaming machines in betting shops

The average total quantity of gaming machines in GB betting shops was 32,875 during this last reporting period (2.9% decrease compared to the previous period).

Gaming machines in betting shops accounted for 18.1% of the total number of machines across all licensed gambling sectors.

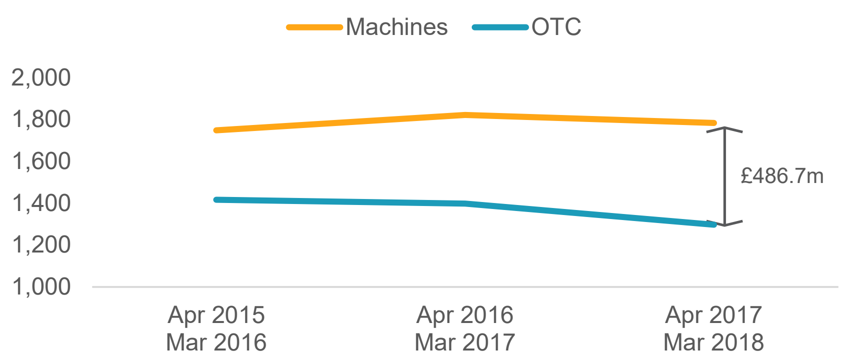
The total GGY from gaming machines in betting shops was £1.78bn (2.1% decrease), of which Category B2 machines accounted for 96.1%[21].

Gaming machine GGY in non-remote betting premises accounted for 65.2% of gaming machine GGY across all sectors.

## Off-course combined GGY (gaming machines and betting)

GGY from over-the-counter betting was £1.3bn (42.1%) of the total GGY for off-course betting between April 2017 and March 2018. GGY from machines in betting premises accounted for the remaining £1.8bn (57.9%) of total off-course GGY.

**Figure 10: Off-course betting GGY breakdown (£m)**



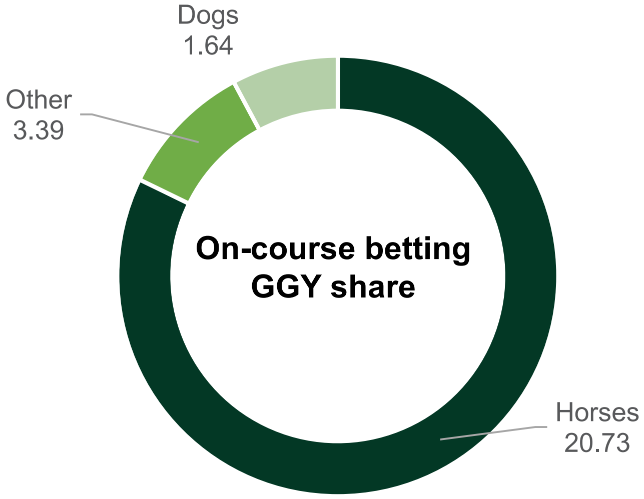

21 In submitting regulatory return information for a machine or a terminal which offers games that equate to different machine categoriesprior to April 2018, operators were required to submit information based on the highest category of game available.

## On-course betting

The largest percentage of GGY from on-course betting was on horse racing. In comparison with the last reporting period the GGY for horses declined by 0.9%. GGY for 'Other'[22] has increased by 27.2%.

On-course betting generated £25.76m in GGY this year; a 2.3% decrease compared to the previous period. This sub-sector represents 0.2% of total industry GGY.

**Figure 11: On-course betting GGY (£m)**

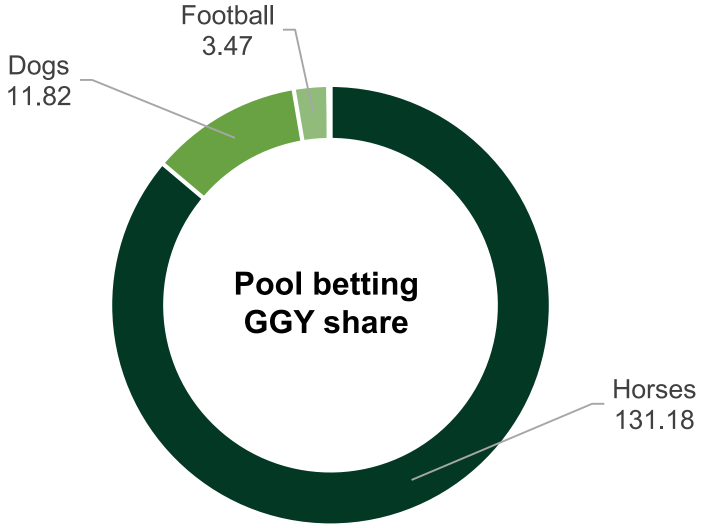



## Pool betting

Pool betting includes horse racing, dog racing, football, other sports pools, and fantasy football-type competitions. The largest percentage of GGY from pool betting was on horse racing. Pool betting activities other than horse racing, dog racing and football was minimal as a share of the total.

Pool betting generated £146.47m in GGY this year; a 1.1% increase compared to the previous period. This sub-sector only represents 1% of total industry GGY.

**Figure 12: Pool betting GGY (£m)**




22 The 'Other' category captures all betting activity outside those listed in the figure and where operators have been unable to break down the amount by category. This includes sporting activity and non-sporting activity.

GAMBLING COMMISSION

# National Lottery

# National Lottery

## Overview

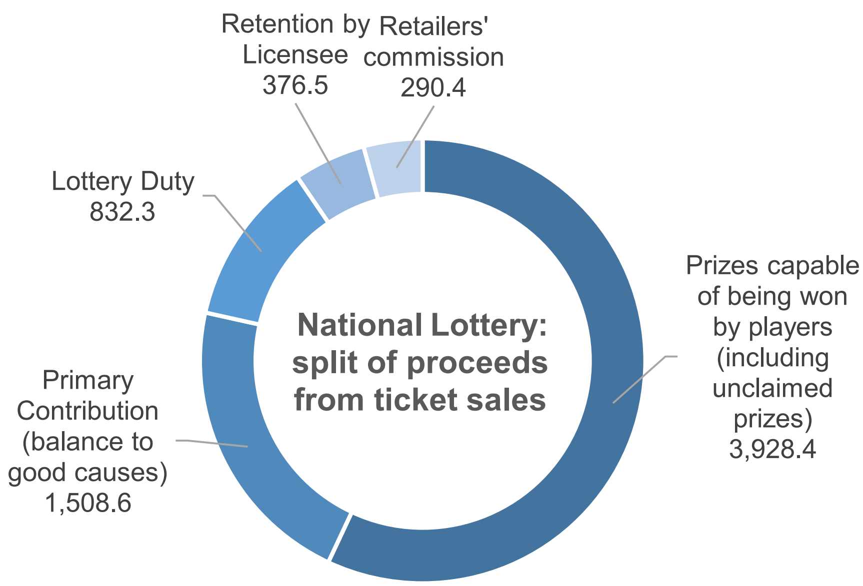
Section 5 of the National Lottery Act allows Gambling Commission to issue a licence to an organisation to run the National Lottery. Only one Section 5 licence may be issued at any one time. The current licence holder is Camelot.

Sales for National Lottery games increased by 0.2% in the year to March 2018, from £6.92bn to £6.94bn.

The total sales minus prizes (GGY equivalent) for the National Lottery was £3.01bn from April 2017 to March 2018. This represented 20.8% of the total industry GGY.

As a proportion of total proceeds, the balance to good causes from the National Lottery has increased from 21.5% to 21.7% in the year to March 2018.

**Figure 13: National Lottery (£m)[23] prizes, expenses and primary contribution (balance to good causes) (£m).**




23 Sales figures are tracked by the Retailers' Commission and Lottery Duty figures.

## Primary contribution (balance to good causes)

**Table 11: Balance to good causes (£m)**

| | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Primary contribution (Balance to good causes) | 1,788.3 | 1,486.9 | 1,508.6 |

National Lottery balances to good causes increased by 1.5% to £1.51bn in the period April 2017 to March 2018.

## Prizes

**Table 12: Prizes (£m)**

| | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Prizes | 4,198.9 | 3,943.2 | 3,928.4 |

National Lottery prizes decreased by 0.4% to £3.93bn in the period April 2017 to March 2018[24].

## Expenditure

**Table 13: Expenditure (£m)**

| | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Lottery duty | 913.9 | 830.6 | 832.3 |
| Retailers' commission | 330.2 | 296.3 | 290.4 |
| Retention by licensee | 384.4 | 364.8 | 376.5 |
| **Total** | **1,628.5** | **1,491.7** | **1,499.2** |

National Lottery expenditure increased by 0.5% to £1.50bn in the period April 2017 to March 2018[25].

24 Prizes capable of being won by players (including unclaimed prizes).

25 Expenditure comprises of lottery duty, retailers' commission and retention by licensee. Retention by Licensee includes a Secondary Contribution that the Licensee pays to Good Causes, the following financial year. Further to Primary Contribution and Secondary Contribution, other payments are made to Good Causes, including Unclaimed Prizes, Unpaid Prizes, Dormant Wallets and Trust Interest.

# Casinos

# Casino

## Gambling Act 2005 casinos – update

Under Section 175(4) of the Gambling Act 2005 (the 2005 Act), 16 areas were determined as potential locations for 8 large casinos and 8 small casinos.

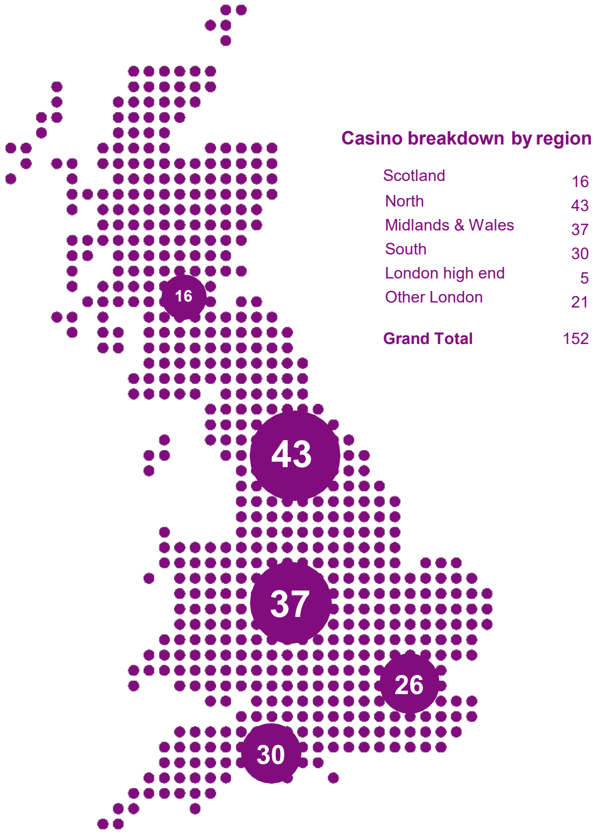
One large casino was permitted to be licensed in Great Yarmouth, Kingston-Upon-Hull, Leeds, Middlesbrough, Milton Keynes, Newham, Solihull and Southampton. At September 2018, four large casinos had opened under the 2005 Act: Aspers (Stratford City) Ltd in Newham, Aspers (Milton Keynes) Ltd in Milton Keynes, Genting International Casino (Resorts World Birmingham) at the National Exhibition Centre in Solihull and Victoria Gate Casino (Global Gaming Ventures) in Leeds.

The 2005 Act small casinos were allocated to Bath and North-East Somerset, Dumfries and Galloway, East Lindsey, Luton, Scarborough, Swansea, Torbay and Wolverhampton.

Three small 2005 Act casinos are now open, two in premises previously operated as 1968 Act converted casinos and operated by Grosvenor Casinos in Luton and by Casino 36 in Wolverhampton. The third small casino was a new development in Bath, where there are no other casinos; this is operated by Century Casinos.

One further 2005 Act small casino is scheduled to open before the end of 2018 in Scarborough, and this is another expansion of an existing casino.

This leaves four large casino licences which have been awarded but have yet to be developed, and four small casino licences where the licensing authority has not run the competition to allocate the licence.




## Overview

There were 152 casinos operating in GB, as at 30 September 2018. The casino sector was dominated by two operators; Rank Group (Grosvenor Casinos and 'G' Casinos) and Genting UK (Genting Casinos/Clubs), which collectively accounted for 72% of casino premises.

**Table 14: Number of operating casinos (2005 and 1968 Act casinos)**

| Organisation | As at 31 Mar 2017 | As at 31 Mar 2018 | As at 30 Sep 2018 |
|---|---|---|---|
| Rank Group | 65 | 67 | 67 |
| Genting UK | 43 | 42 | 43 |
| Caesars Entertainment | 9 | 9 | 9 |
| Other operators | 33 | 34 | 33 |
| **Total** | **150** | **152** | **152** |

Total GGY from the non-remote casino sector was £1.19bn from April 2017 to March 2018. This represented 8.3% of the total industry GGY.

## Casino attendance

Total casino attendance between April 2017 and March 2018 was 19.23m (2.5% decrease on the previous period).

The most attended casino premises were those in 'Other London' (which excludes the London high end casinos) and the North; collectively representing 55.8% of total casino attendance.

**Table 15: Casino attendance by region (m)**

| Region | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Scotland | 1.61 | 1.50 | 1.45 |
| North | 5.18 | 4.94 | 5.00 |
| Midlands & Wales | 3.75 | 3.83 | 3.72 |
| South | 3.62 | 3.43 | 3.18 |
| London high end[26] | 0.16 | 0.16 | 0.15 |
| Other London | 6.24 | 5.86 | 5.74 |
| **Total** | **20.56** | **19.72** | **19.23** |

## Industry table numbers (average)

**Table 16: Electronic gaming player positions (average)**

| Table type | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Electronic gaming[28] | 3,716 | 3,731 | 3,920 |

**Table 17: Industry table numbers (average)** [27]

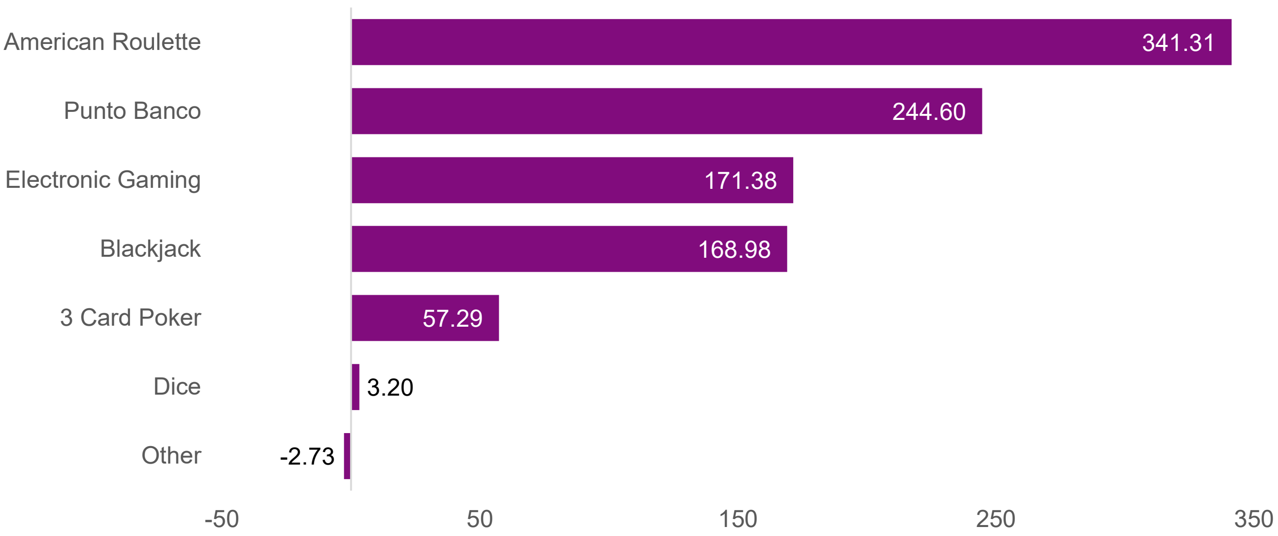
| Organisation | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| 3 Card Poker | 241 | 243 | 261 |
| American Roulette | 860 | 871 | 901 |
| Blackjack | 606 | 597 | 599 |
| Casino Stud Poker | 7 | 9 | 0 |
| Dice | 14 | 19 | 15 |
| Other | 67 | 100 | 84 |
| Punto Banco | 157 | 161 | 188 |
| **Total** | **1,952** | **1,999** | **2,048** |

## Casino games GGY

American Roulette games generated the largest share of GGY in non-remote casinos (34.7%), followed by Punto Banco (24.9%) and Electronic Gaming (17.4%).

The largest decrease by a table game in the year to March 2018 was for American Roulette which fell by £13.3m (3.7%)

**Figure 14: Casino table games, GGY share (£m)**




26 Casinos referred to as London 'high end' comprise six casinos agreed with the industry, which have a distinctive pattern of low volume attendance and high value gaming.

27 Industry table numbers can fluctuate during the reporting period and as such operators are required to provide average table numbers.

28 Electronic gaming enables multiple players to participate in the same game of roulette, thus increasing player participation opportunities and reducing overheads. Notably, electronic gaming refers to player positions and not table numbers.

## Gaming machines in casinos

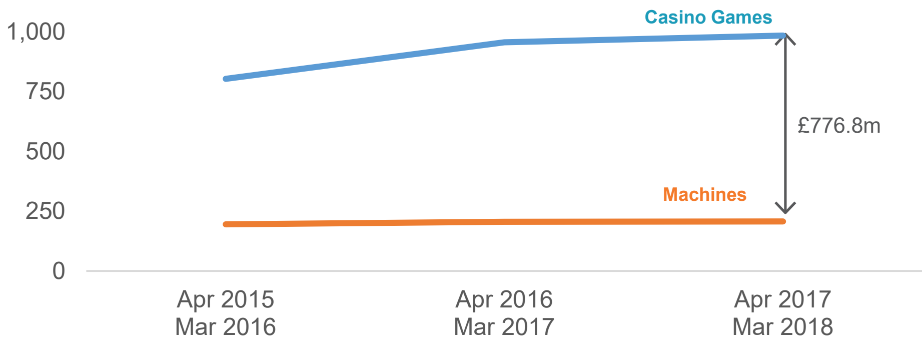
During this reporting period, the overall number of gaming machines in casinos was 3,204 (a 1.0% increase). These accounted for 1.8% of the total number of machines across all gambling sectors.

Casino gaming machine GGY was £207.8m, an increase of 0.2% on the previous period. This accounted for 7.6% of gaming machine GGY across all sectors.

## Combined casino games and gaming machines GGY

GGY from casino games was £984.0m (82.6%) of the total GGY in the non-remote casino sector, between April 2017 and March 2018. GGY from machines in casinos accounted for the remaining £207.2m (17.4%) of total GGY.

**Figure 15: Casino GGY (£m) revenue source yearly comparison**



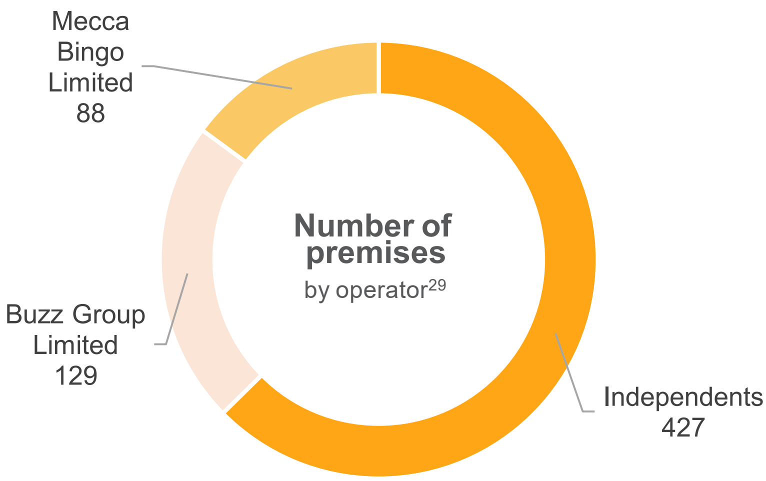
# Bingo

# Bingo

## Overview

The bingo sector comprises various types of businesses including large bingo clubs, holiday parks, working men's clubs and smaller high street venues. As of 31 March 2018, 185 operators held non-remote bingo licences.

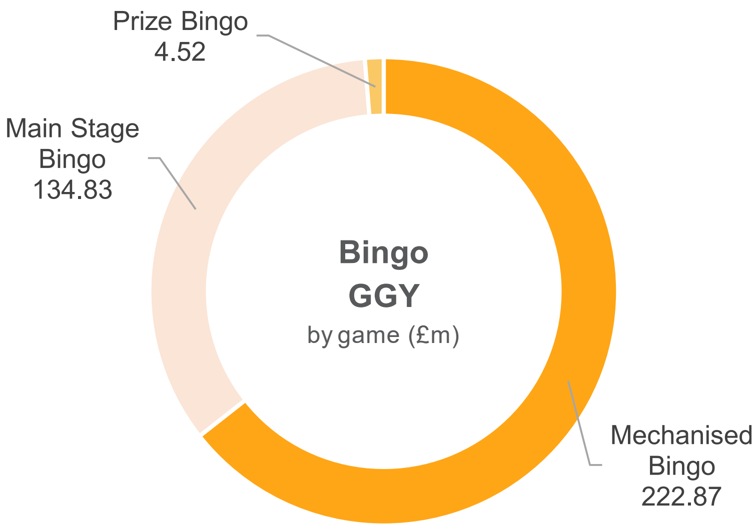
**Figure 16: Number of premises by operator**




The total quantity of bingo premises was 644 as at 30 September 2018, a 1.7% decrease compared with the previous period.

The dominant sector operators were Buzz Group Limited and Mecca Bingo Limited, which together accounted for 33.7% of the sector premises total.

**Figure 17: Bingo GGY by game**




Total GGY from non-remote bingo games was £362.22m from April 2017 to March 2018 (a 1.2% decrease). This represented 2.5% of the total industry GGY.

The largest percentage of non-machine GGY for the bingo sector continued to be provided by mechanised bingo (61.5%), followed by mainstage bingo (37.2%) and prize bingo (1.2%).

29 Operators who offer bingo as exempt gaming in clubs (including members' clubs, commercial clubs and miners' welfare institutes) and have hit the threshold for high turnover bingo (as defined by Section 275) have been recording the number of licensed premises incorrectly in their regulatory returns, as a consequence the figures are inflated. These operators are required to hold an operating licence, but not a premises licence, if the gaming offered continues to meet the exemptions. We continue to review these returns to rectify errors.

## Gaming machines in bingo clubs

The average total quantity of gaming machines in GB bingo premises was 72,861 during the last reporting period (an increase of 7.4% compared to the previous period). Growth was seen in all machine categories.

The composition of gaming machines in bingo clubs has changed in recent years. The widespread use of electronic bingo terminals (EBTs)[30] by a number of providers accounts for much of the increase in the number of machines since April 2011.

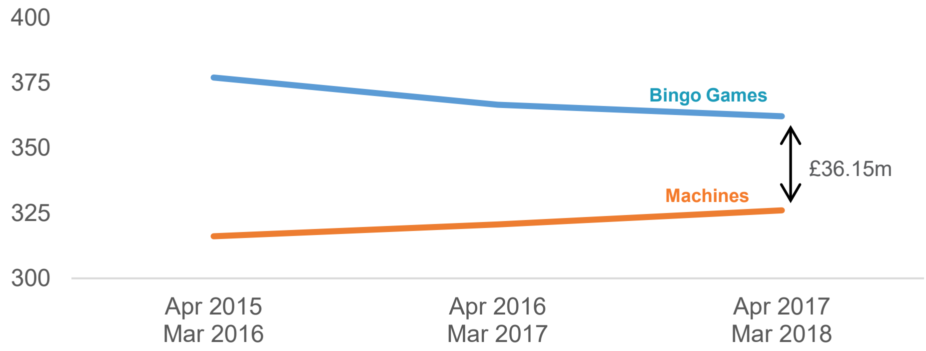
The total GGY from gaming machines in bingo premises was £326.07m (1.7% increase), of which Category B3 and Category C machines accounted for 94.1%[31].

This GGY accounted for 11.9% of gaming machine GGY across all sectors.

## Bingo combined GGY (bingo and gaming machines)

GGY from bingo games was £362.22m (52.6%) of the total GGY in the non-remote bingo sector between April 2017 and March 2018. GGY from machines in bingo premises accounted for the remaining £326.07m (47.4%) of total GGY.

**Figure 18: Bingo GGY (£m) revenue source yearly comparison**




30 EBTs are devices that enable a player to participate in bingo electronically and they can choose to purchase a larger number of tickets than they would usually be able to handle from playing on paper. EBTs can also contain other gambling related content such as slot games. Originally introduced to the market containing Category D content, evidence indicates that a number of the EBTs now operate with Category C and Category B3 content.

31 The overall increases in GGY for Category B3 and Category C machines (collectively) is in part due to a number of operators putting in place better systems to record GGY by category of machine, having previously recorded this detail as a total of GGY for all machines on site.

# Arcades

# Arcades

## Overview

As at 31 March 2018, there were 458 adult gaming centre (AGC) licences and 141 family entertainment centre (FEC) licences, held by 494 operators. This is a 2.8% decrease in the number of operators since the previous period.

Total GGY from the arcades sector was £417.98m from April 2017 to March 2018 (0.9% decrease). This represented 15.3% of the total industry machines GGY.

**Table 18: Number of arcade premises[32]**

| Commission Licensed activity | As at 31 Mar 2017 | As at 31 Mar 2018 | As at 30 Sep 2018[33] |
|---|---|---|---|
| Adult gaming centre (AGC) | 1,554 | 1,490 | 1,404 |
| Family entertainment centre (FEC)[34] | 321 | 221 | 202 |
| **Total** | **1,875** | **1,711** | **1,606** |

There were 1,404 AGCs in GB (5.8% decrease on the previous period) and 202 FECs (8.6% decrease).

## Adult gaming centres (AGC)

The average total quantity of gaming machines in AGCs was 54,915 during this period (0.01% decrease compared with the last period).

**Table 19: AGC machine numbers (average)**

| Machine category | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| B3 | 10,680 | 10,925 | 10,453 |
| B4 | 118 | 73 | 47 |
| C | 29,656 | 30,060 | 30,861 |
| D | 14,826 | 13,862 | 13,555 |
| **Total** | **55,280** | **54,921** | **54,915** |

These machines accounted for 30.3% of the average number of machines across all regulated gambling sectors.

**Table 20: AGC machine GGY (£m)**

| Machine category | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| B3 | 175.60 | 197.50 | 207.34 |
| B4 | 0.38 | 0.31 | 0.40 |
| C | 120.08 | 127.86 | 128.67 |
| D | 25.29 | 25.39 | 24.62 |
| Aggregated categories[35] | 23.89 | 5.44 | 0.00 |
| **Total** | **345.25** | **356.50** | **361.04** |

Gaming machine GGY in AGCs increased this period, by 1.3%, to £361.04m.

32 Premises figures are based on operators' most recent regulatory returns.
33 Most recent return submitted.
34 Will only include those FECs licensed by the Commission, excludes those requiring only a permit from local licensing authorities.
35 Where GGY figures have been provided, but not broken down by machine category.

## Family entertainment centres (licensed) (FEC)

The average total quantity of gaming machines in FECs was 17,453 this period (22.1% decrease compared with the last period).

**Table 21: FEC (licensed) machine numbers (average)**

| Machine category | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| C | 2,216 | 1,982 | 1,562 |
| D | 23,037 | 20,425 | 15,891 |
| **Total** | **25,253** | **22,407** | **17,453** |

These machines accounted for 9.6% of the average number of machines across all regulated sectors.

**Table 22: FEC (licensed) GGY (£m)**

| Machine category | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| C | 3.73 | 3.27 | 2.61 |
| D | 63.55 | 60.32 | 54.33 |
| Aggregated categories[36] | 5.54 | 1.55 | 0.00 |
| **Total** | **72.81** | **65.14** | **56.95** |

Gaming machine GGY in FECs decreased this period, by 12.6%, to £56.95m.

36 Where GGY figures have been provided, but not broken down by machine category.

GAMBLING COMMISSION

# Large society lotteries

# Large society lotteries

## Overview

In order to offer society lotteries lawfully, the Gambling Act 2005[37] requires that a society holds either a registration with its local licensing authority or a licence from the Gambling Commission. A society requires a licence from the Commission where:

- the proceeds in an individual draw exceed £20,000 or
- the aggregate lottery proceeds in a calendar year exceed £250,000.

Those lotteries licensed by the Gambling Commission are known as large society lotteries.

Below these thresholds a society may operate without a Commission licence, provided it is registered with its local licensing authority. These types of lotteries are known as small society lotteries.

Local authority lotteries are those where a lottery operating licence is issued to a local authority, by the Commission, to raise funds to cover anything for which they have the power to incur expenditure.

Since the introduction of the Gambling Act 2005, 47 local authorities have been granted lottery operating licences.

As of 31 March 2018, there were 517 non-commercial[38] society lottery operators holding 687 licences and 43 external lottery manager[39] companies (ELM) holding 62 ELM licences.

**Table 23: Lottery licences**

| Licence | Type | As at 31 Mar 2016 | As at 31 Mar 2017 | As at 31 Mar 2018 |
|---|---|---|---|---|
| Society lottery | Non-remote | 476 | 475 | 475 |
| | Remote | 162 | 175 | 212 |
| External lottery manager (ELM) | Non-remote | 34 | 32 | 37 |
| | Remote | 20 | 21 | 25 |
| **Total** | | **692** | **703** | **749** |

Sales for large lotteries increased by £88.79m in the year to March 2018 to £676.45m.

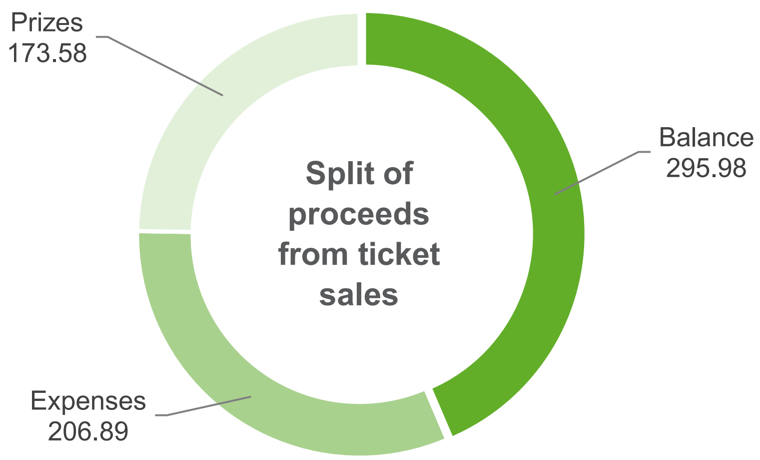
Total sales minus prizes (GGY equivalent) for large society lotteries was £502.87m from April 2017 to March 2018. This represented 3.5% of the total industry GGY.

Expenses £206.89m and balance to good causes £295.98 both rose during this period.

As a proportion of the total proceeds (sales), the balance to good causes from large society lotteries has increased from 43.5% to 43.8% in the year to March 2018.

37 Schedule 11, Part 4, Section 31.
38 A society is defined as non-commercial if it is organised for charitable, sporting, cultural or other purposes apart from private or commercial gain.
39 Societies may employ a licensed external lottery manager (ELM) to promote all or part of their lottery on their behalf.

Figure 19: Large society lotteries prizes, expenses and balance to good causes (£m)




## Balance to good causes

Table 24: Balance to good causes (£m)

| | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Balance (to good causes) | 212.16 | 255.92 | 295.98 |

Large society balances to good causes increased by 15.7% to £295.98m in the period April 2017 to March 2018.

## Prizes

Table 25: Prizes (£m)

| | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Prizes | 113.57 | 145.32 | 173.58 |

Large society lottery prizes increased by 19.4% to £173.58m in the period April 2017 to March 2018.

## Expenditure

Table 26: Expenditure (£m)

| | Apr 2015 Mar 2016 | Apr 2016 Mar 2017 | Apr 2017 Mar 2018 |
|---|---|---|---|
| Expenditure | 167.61 | 186.41 | 206.89 |

Large society lottery expenditure increased by 11.0% to £206.89m in the period April 2017 to March 2018.

GAMBLING COMMISSION

# Appendices

# Appendix 1 – Compilation methodology

Regulatory returns must be completed annually by most operators and quarterly by others (large betting operators, casino and remote operators). The date on which returns fall due depends on the date chosen by the particular licence holder, for example, it may coincide with an organisation's own reporting cycle, may be on an annual calendar year basis or run from 1 September to 31 August in line with the date that the Act came into force. In addition:

- annual regulatory returns must be submitted within 42 days of the date on which the return falls due
- quarterly returns must be submitted within 28 days of the date on which the return falls due
- lottery submissions must be sent to the Commission within three months of the date of determination of the lottery or, in the case of an 'instant lottery', within three months of the last date on which tickets in the lottery were on sale

Operators should have submitted all regulatory returns due for the full year period ending prior to 31 March 2018.

When providing figures covering a particular period, the Commission includes all returns that fall wholly or partially within that reporting period. For each operator that submits an annual return, a weighted average is calculated based on the number of days each of the two returns relates to the reporting period. No calculation is required for quarterly returns as they fall wholly within the reporting period.

Where an operator's annual return covers only part of the period in question the figure has been adjusted to produce an estimate for the full year.[40]

Totals and percentages are calculated from unrounded figures and where appropriate totals are shown in outturn (actual) prices and not adjusted for inflation.

Recent figures are provisional, and subject to amendment within future publications.

Until November 2014, the Gambling Commission only regulated operators based in GB. From this period onwards, we have regulated remote operators who supply to GB. Note therefore that the first reporting period for the data we publish for remote only covers five months from November 2014 to March 2015.

Cleansing of the regulatory returns data is undertaken for each Industry statistics publication. Controls are in place to alert the operator to potentially erroneous numbers at submission of the electronic returns. Commission sector specialists and data analysts apply further scrutiny.

We have provided comparator data consistent within this publication, with tables containing data from April 2015 to March 2018. Data for earlier years can be found in the Excel data tables of this report. In certain cases it has not been possible to provide data from previous periods in this format. In these cases, please refer to the Gambling Commission Annual Reviews and Annual Reports.

Data in this report is not index-linked.

40 The amounts on each regulatory return (which are captured by the reporting period) are divided by 365 (366 if a leap year) and then multiplied by the number of days within the reporting period that is covered by each regulatory return.

# Appendix 2 – Gaming machine categorisation

Gaming machines (fruit machines, slot machines) are categorised on the basis of the maximum stake and maximum prize available.

**Table 27: Gaming machine categorisation**

| Machine Category | Maximum stake | Maximum prize |
|---|---|---|
| B1 | £5 | £10,000[41] |
| B2 | £100 | £500 |
| B3 | £2 | £500 |
| B3A | £2 | £500 |
| B4 | £2 | £400 |
| C | £1 | £100 |
| D non-money prize (other than crane grab machine or a coin pusher or penny falls machine) | 30p | £8 |
| D non-money prize (crane grab machine) | £1 | £50 |
| D money prize (other than a coin pusher or penny falls machine) | 10p | £5 |
| D combined money and non-money prize (other than coin pusher or penny falls machines) | 10p | £8 (of which no more than £5 may be a money prize) |
| D combined money and non-money prize (coin pusher or penny falls machines) | 20p | £20 (of which no more than £10 may be a money prize) |

The Gambling Commission licenses machines at casinos, betting premises and tracks occupied by pool betting, bingo premises, AGCs and licensed FECs. Machines in all other venues are licensed, or permitted, by local authorities. Each premises is entitled to operate a certain category and quantity of gaming machines, dependent on its premises type.

**Table 28: Machine category entitlement[42]**

| Premises | Machine category | | | | | | |
|---|---|---|---|---|---|---|---|
| | A | B1 | B2 | B3 | B4 | C | D |
| **Large casino**<br>(machine/table ratio of 5-1 up to maximum) | | Maximum of 150 machines<br>any combination of machines in categories B to D (except B3A machines), within a total limit of 150 (subject to machine/table ratio) | | | | | |
| **Small casino**<br>(machine/table ratio of 2-1 up to maximum) | | Maximum of 80 machines<br>any combination of machines in categories B to D (except B3A machines), within a total limit of 80 (subject to machine/table ratio) | | | | | |
| **Pre-2005 Act casino**<br>(no machine/table ratio) | | Maximum of 20 machines<br>any combination of machines in categories B to D (except B3A machines), or any number of C or D machines instead | | | | | |
| **Betting premises and tracks occupied by pool betting** | | | Maximum of 4 machines categories B2 to D (except B3A machines), | | | | |
| **Bingo premises** | | | | Maximum of 20% of the totat number of gaming machines which are available for use on the premises catergories B3 or B4 | | No limit on category C or D machines | |
| **Adult gaming centre** | | | | Maximum of 20% of the totat number of gaming machines which are available for use on the premises catergories B3 or B4 | | No limit on category C or D machines | |
| **Family entertainment centre (licensed)** | | | | | | No limit on category C or D machines | |
| **Family entertainment centre**<br>(with permit) | | | | | | | No limit on category D machines |
| **Clubs or miners welfare institute**<br>(with permits) | | | | | Maximum of 3 machines in categories B3A or B4 to D | | |
| **Qualifying alcohol licensed premises** | | | | | | 1 or 2 machines of category C or D automatic upon notification | |
| **Qualifying alcohol licensed premises**<br>(with licensed premises gaming machine permit) | | | | | | Number of category C-D machines as specified on permit | |
| **Travelling fair** | | | | | | | No limit on category D machines |

41 With the option of a maximum £20,000 linked progressive jackpot on a premises basis only.
42 Further information on machine entitlement can be seen in the Commission's Guidance to licensing authorities (Appendix A).

# Appendix 3 – Terminology

**Account** – an account represents an entity (for example, public limited company, limited company, partnership, individual) that holds an operating licence.

**Adult gaming centre (AGC)** – an arcade comprising a limited number of B3 and B4 machines and an unlimited number of category C and D machines. No one under the age of 18 is allowed to enter.

**Betting exchange** – also known as a 'betting intermediary' means a person who provides a service designed to facilitate the making or acceptance of bets between others.

**Breaches of self-exclusion** – includes the number of times any self-excluded customer has attempted to gain access to operators' facilities, attempted to gamble, or actually gambled. It is not limited to an attempt to gamble, and includes attempts to enter premises or access online gambling facilities.

**Casino drop and win data** – is provided voluntarily by casinos (licensed by the Commission) on a monthly basis, and shows the amount of money exchanged for chips in a casino (drop) and the amount retained by the casino (win).

**External lottery manager (ELM)** – a person or body that makes arrangements for a lottery on behalf of a society or Local Authority of which they are not a member
officer or employee. A society or Local Authority may employ an ELM to promote all or some of its lottery.

**Family entertainment centre (FEC)** – an arcade comprising unlimited category C and D machines. Under 18s are allowed in FECs but not into the area offering category C machines.

**Gross gambling yield (GGY)** – the amount retained by operators after the payment of winnings but before the deduction of the costs of the operation.

**Licence** – an account may incorporate one or more licences. There are three types of licence that an operator account can hold and these are non-remote, remote and ancillary.

**Licensed activity** – a licensed operator may be authorised to carry out one or more licensed activity. A licensed activity is the actual type of gambling function permitted through an operating licence in a particular sector such as bingo or a lottery.

**Numbers** – is the term used to capture virtual content and lotto style games such as '49'.

**Pool betting** – is wagering where the winnings are determined with reference to the total stakes placed on that event.

**Proprietary GGY** – GGY retained by remote operators which is not subject to a revenue share agreement (ie is completely retained by the individual operator).

**Regulatory returns** – a means of collecting a range of information from licence holders within the gambling industry in order to monitor compliance with gambling legislation, regulations and the licence conditions and codes of practice, and to inform the Commission's understanding of the industry.

**Remote** – remote gambling is defined by the Gambling Act 2005 as gambling in which persons participate by the use of remote communication including: the internet, telephone, television, radio and any other kind of electronic or other technology for facilitating communication.

**Revenue share GGY** – revenue share is defined as GGY which is subject to a contractual arrangement to be shared between two or more Commission licensed operators.

**Sector** – there are six industry licensed sectors regulated by the Commission – arcades and gaming machines, betting, bingo, casinos, lotteries and remote and gambling software (which includes remote betting, bingo and casinos).

**Self-exclusion** – is an agreement between an individual and an operator whereby the operator takes all reasonable steps to refuse services or to otherwise prevent an individual from participating in gambling at their premises or by using their facilities. The minimum period of self-exclusion is six months.

**Turnover** – the amount accrued through the sale of their product (bingo book/betting slip/lottery ticket/software etc) before winnings and overheads/expenses are deducted.

GAMBLING COMMISSION

**making gambling fairer and safer**

Responsible statisticians:

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