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Gambling Update

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Gambling Update Topics

- Gambling in Post Pandemic Britain
- Gambling Act 2005 Review

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Gambling in Post Pandemic Britain

- Year to March 2022, showed participation up by 3% reflecting land based opening up. Lower than pre-pandemic
- In-person gambling participation rate increased to 26% (from 23% in year to March 2021) showing some signs of recovery since the pandemic
- Online gambling participation remained statistically stable at 26%, compared to year to March 2021, but continues its long-term increase
- Overall participation in gambling is stable and has not been growing
- Online has continued to grow, but the whole market is not

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Gambling in Post Pandemic Britain

- Online gambling grew rapidly during the pandemic when the land-based sector could not operate, or was heavily restricted
- Overall gambling participation has not changed
- Participation levelling out
- Trend of new and novel products
- Overall participation remain statistically stable
- More women gambling
- Consolidation of the market
- The top 10 operators now represent 77% of total B2C GGY in Great Britain
- Land based AGC/Bingo licence applications
- Betting Shops continue to close but not as fast as previous years

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Gambling Act 2005 Review

- Review of the Gambling Act 2005 Terms of Reference and Call for Evidence
- Published 8 December 2020



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Gambling Act 2005 Review - Recap

- Online protections - players and products
- Advertising, sponsorship and branding
- Gambling Commission's powers and resources
- Consumer Redress
- Age limits and verification
- Land based gambling



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Gambling Act 2005 Review - using our crystal ball


- What do we think might be in the Review?
 - Gambling Premises Cumulative Impact
 - Changes to gaming machines in Casinos and bingo
 - Dormant casino licences
 - Cards or cashless on gaming machines



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Gambling Act 2005 Review - Cumulative Impact


- Local Government Authority and Association of Police and Crime Commissioner's letter on the Gambling Act 2005 and cumulative impact



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Gambling Act 2005 Review - Cumulative Impact and the Licensing Act 2003

- Guidance issued by the Secretary of State under section 182
- *"...the number, type or density of licensed premises, such as those selling alcohol or providing late night refreshment, is high or exceptional, serious problems of nuisance and disorder may arise outside or some distance from those premises."*
- Cumulative Impact Assessments
- Evidence based
- Approx. 200



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Gambling Act 2005 Review – Aim to permit

- Gambling Act 2005 section 153 Principles to be applied
 - (1) In exercising their functions a licensing authority shall aim to permit the use of premises for gambling in so far as the authority think it—
 - (a) in accordance with any relevant code of practice
 - (b) in accordance with any relevant guidance issued by the Commission
 - (c) reasonably consistent with the licensing objectives
 - (d) in accordance with the statement published by the authority

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Gambling Act 2005 Review - Cumulative Impact

- Existing powers provided to responsible authorities under Gambling act 2005
 - Part 7 power to review, sections 197 – 203
 - Section 202 Action following a review
 - Revoke
 - Suspend
 - Amend/add conditions

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Gambling Act 2005 Review - Casinos

- Gaming machine ratios
- Portable casino licences



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Gambling Act 2005 Review – Gaming Machines and Cashless

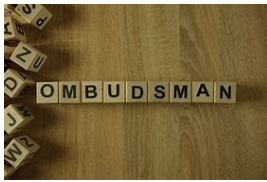
- Higher stakes and prizes?
- Changes to allocations?
- Use of debit card or cashless on gaming machines



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Gambling Act 2005 Review – Other big ticket changes

- Limits stake and prize online
- Ombudsman
- Affordability



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