



the campaign for
fairer gambling

Online Gambling 2025: Great Britain

MONITORING, DATA & ANALYSIS BY



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Campaign for Fairer Gambling: Introduction

In 2022, the trade lobbying group the Betting and Gaming Council (BGC) commissioned Yield Sec (acquired by GCI in November 2025) to report on the GB-facing illegal online gambling sector. The BGC chose not to publish the full report but used many of its findings in press engagement. Subsequently my campaign colleague, Matt Zarb-Cousin of Gamban, presented Yield Sec data and analysis to the Gambling Commission. The Commission was unwilling to engage in any meaningful sense.

Treasury recently awarded £26 million to the Commission to take action against the illegal sector. A task force has been established under the Department of Culture, Media and Sport (DCMS). Neither Gamban nor Yield Sec (now Gaming Compliance International, GCI) were invited to join that task force.

Gamban is the premium global self-exclusion tool with software for the blocking of online gambling, including illegal brands. At the time of writing, Gamban has been refused funding from the over £100 million statutory levy for treatment, prevention, and research.

GCI is the only credible analyst of the total online marketplace, including the illegal sector, using military grade technology and processes, and is retained by certain authorities outside the GB including US state regulators and national governments.

GamStop is the GB's official self-exclusion scheme, functioning for the legal online sector. The illegal sector exploited GamStop to enable their niche entry into GB, not competing with the legal sector, by using "casinos not on GamStop" across their marketing targeting self-excluded individuals.

Coroner inquests in Great Britain are now recording deaths of gambling-related suicides as a consequence of engaging with illegal operators after self-excluding from legal brands. These criminals are despicably causing extreme harm to satisfy their greed.

This report will be provided to the Commission, DCMS, Treasury, and the National Crime Agency (NCA). Organised crime and those profiting by it should be held to account, even if they are BGC members or Commission licensees, B2B suppliers, or affiliates associated with those members or licensees.

2025: Great Britain Online Gambling Marketplace

GGR MarketShare Split

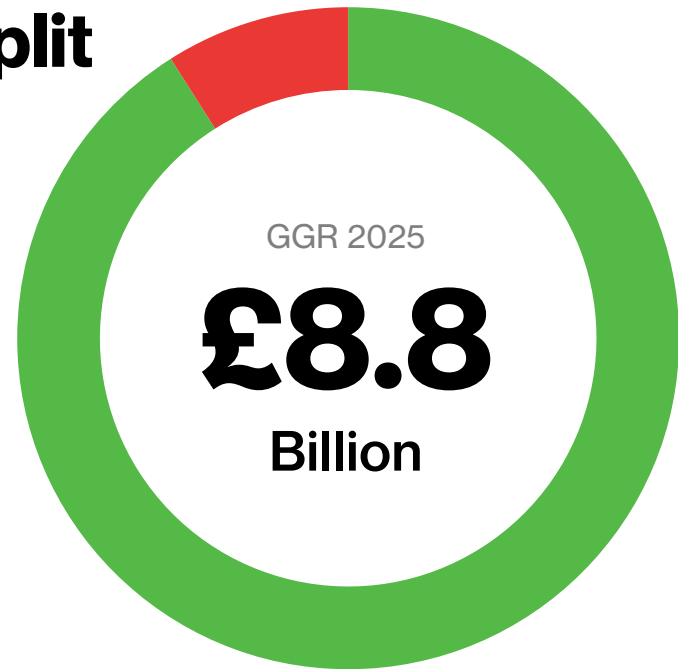
2025

£8.0 Billion

91% Regulated

£0.8 Billion

9% Unregulated



Note: GGR is equivalent to the Gross Gambling Yield (GGY) measure used by the UK Gambling Commission.

Regulated Operators

Regulated and licensed gambling platforms and products, subject to oversight within established legal frameworks.

2,244

Unregulated Operators

Gambling platforms and products not authorized, licensed, or otherwise regulated under the laws of a jurisdiction, but targeting, accessible to, and transacting with consumers in that jurisdiction.

812

2024: Great Britain Online Gambling Marketplace

GGR MarketShare Split

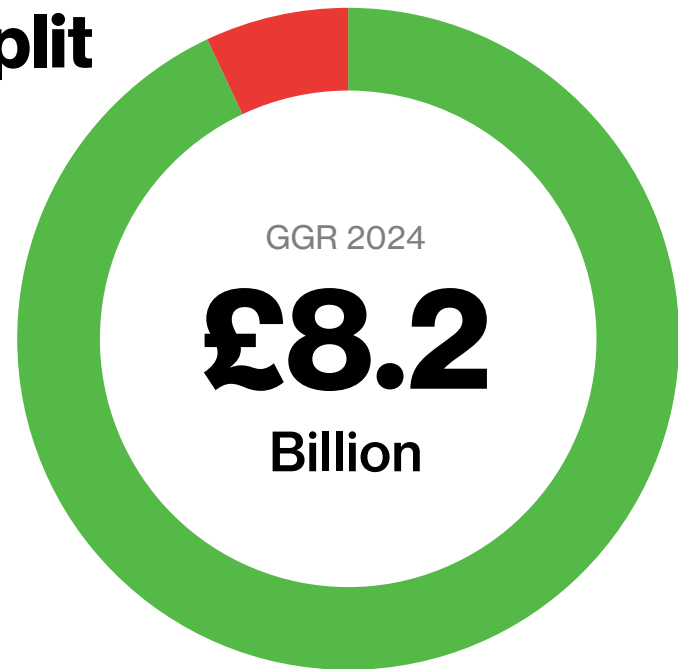
2024

£7.6 Billion

93% Regulated

£0.6 Billion

7% Unregulated



Note: GGR is equivalent to the Gross Gambling Yield (GGY) measure used by the UK Gambling Commission.

Regulated Operators

Regulated and licensed gambling platforms and products, subject to oversight within established legal frameworks.

2,335

Unregulated Operators

Gambling platforms and products not authorized, licensed, or otherwise regulated under the laws of a jurisdiction, but targeting, accessible to, and transacting with consumers in that jurisdiction.

728

Sports Betting and Casino Splits

REVENUE (GGR) PER CATEGORY: £ BILLIONS

Note: GGR is equivalent to the Gross Gambling Yield (GGY) measure used by the UK Gambling Commission.

2025	REGULATED £ BILLIONS	UNREGULATED £ BILLIONS	TOTAL £ BILLIONS
SPORTS BETTING	2.48	0.19	2.67
CASINO	5.50	0.59	6.09
TOTAL	7.98	0.78	8.76

2024	REGULATED £ BILLIONS	UNREGULATED £ BILLIONS	TOTAL £ BILLIONS
SPORTS BETTING	2.60	0.15	2.75
CASINO	5.00	0.43	5.43
TOTAL	7.60	0.58	8.18

2024-2025 CHANGE	REGULATED £ BILLIONS	UNREGULATED £ BILLIONS	TOTAL £ BILLIONS
SPORTS BETTING	↓ 0.12	↑ 0.04	↓ 0.08
CASINO	↑ 0.50	↑ 0.16	↑ 0.66
TOTAL	↑ 0.38	↑ 0.20	↑ 0.58

GGR Per Capita

2025

GB ONLINE GGR	REGULATED GGR	UNREGULATED GGR	TOTAL
SPORTS BETTING	£35.76	£2.78	£38.54
CASINO	£79.34	£8.53	£87.87
TOTAL	£115.09	£11.31	£126.41
2025 – GGR PER CAPITA AS A % OF 2025 INCOME			
SPORTS BETTING	0.10%	0.01%	0.11%
CASINO	0.22%	0.02%	0.24%
TOTAL	0.31%	0.03%	0.34%

2024

GB ONLINE GGR	REGULATED GGR	UNREGULATED GGR	TOTAL
SPORTS BETTING	£37.52	£2.21	£39.73
CASINO	£72.15	£6.20	£78.35
TOTAL	£109.67	£8.41	£118.08
2024 – GGR PER CAPITA AS A % OF 2024 INCOME			
SPORTS BETTING	0.10%	0.01%	0.11%
CASINO	0.20%	0.02%	0.21%
TOTAL	0.30%	0.02%	0.32%

Note 1: GGR is equivalent to the Gross Gambling Yield (GGY) measure used by the UK Gambling Commission.

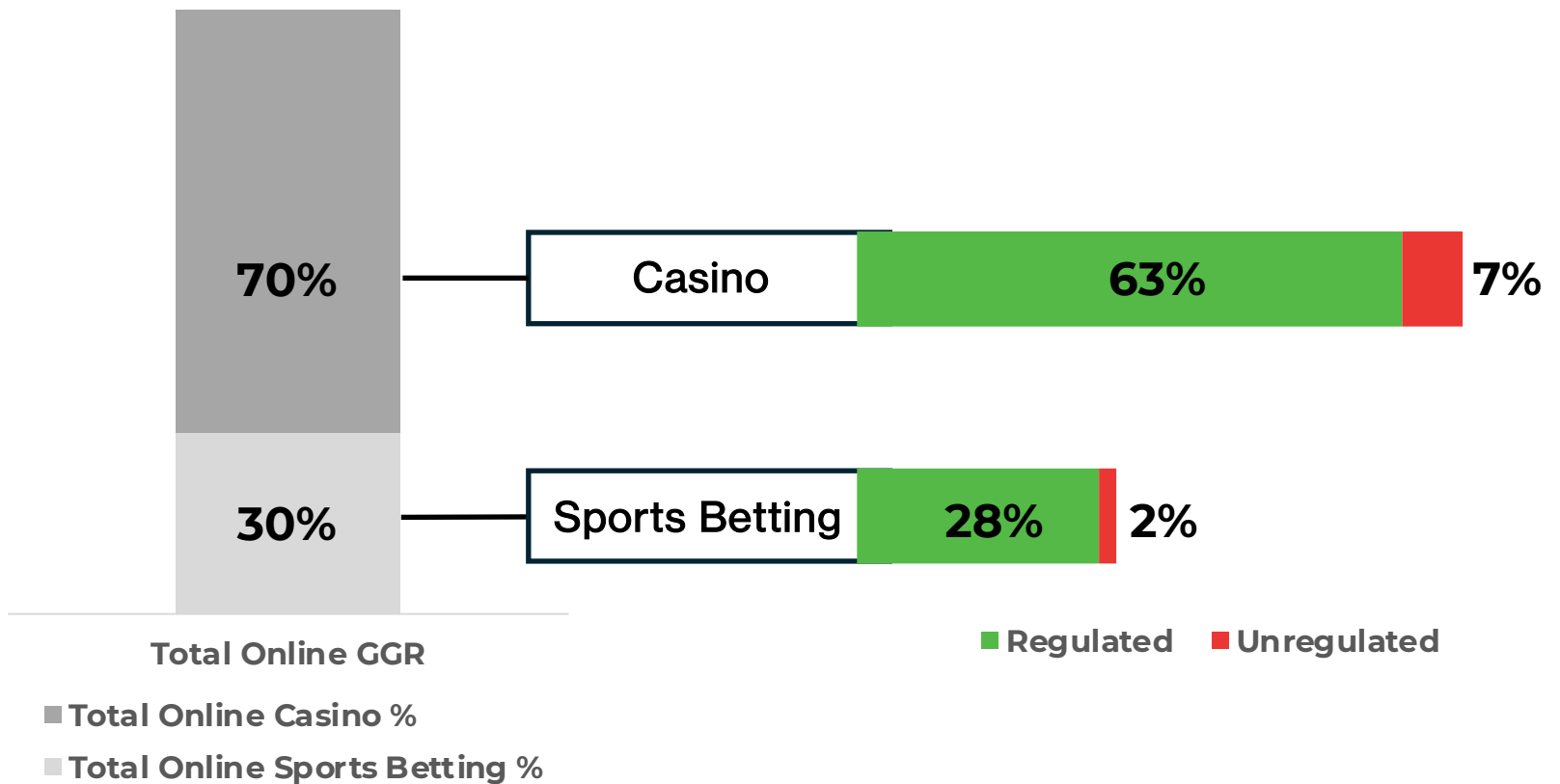
GGR per capita represents total Gross Gambling Revenue divided by the country's population and average income. It is used to compare market size relative to population and income. It does not imply that each individual generated this amount of GGR, nor does it imply the average experience of any specific gambler.

Note 2: Approximate median income of £36,700, taken from <http://ons.gov.uk/> at the time of this report being published (June 2026).

Note 3: Per capita relates to the full GB population, including adults and children.

2025 GGR MarketShare % Splits: Sports and Casino

Blended Product Splits

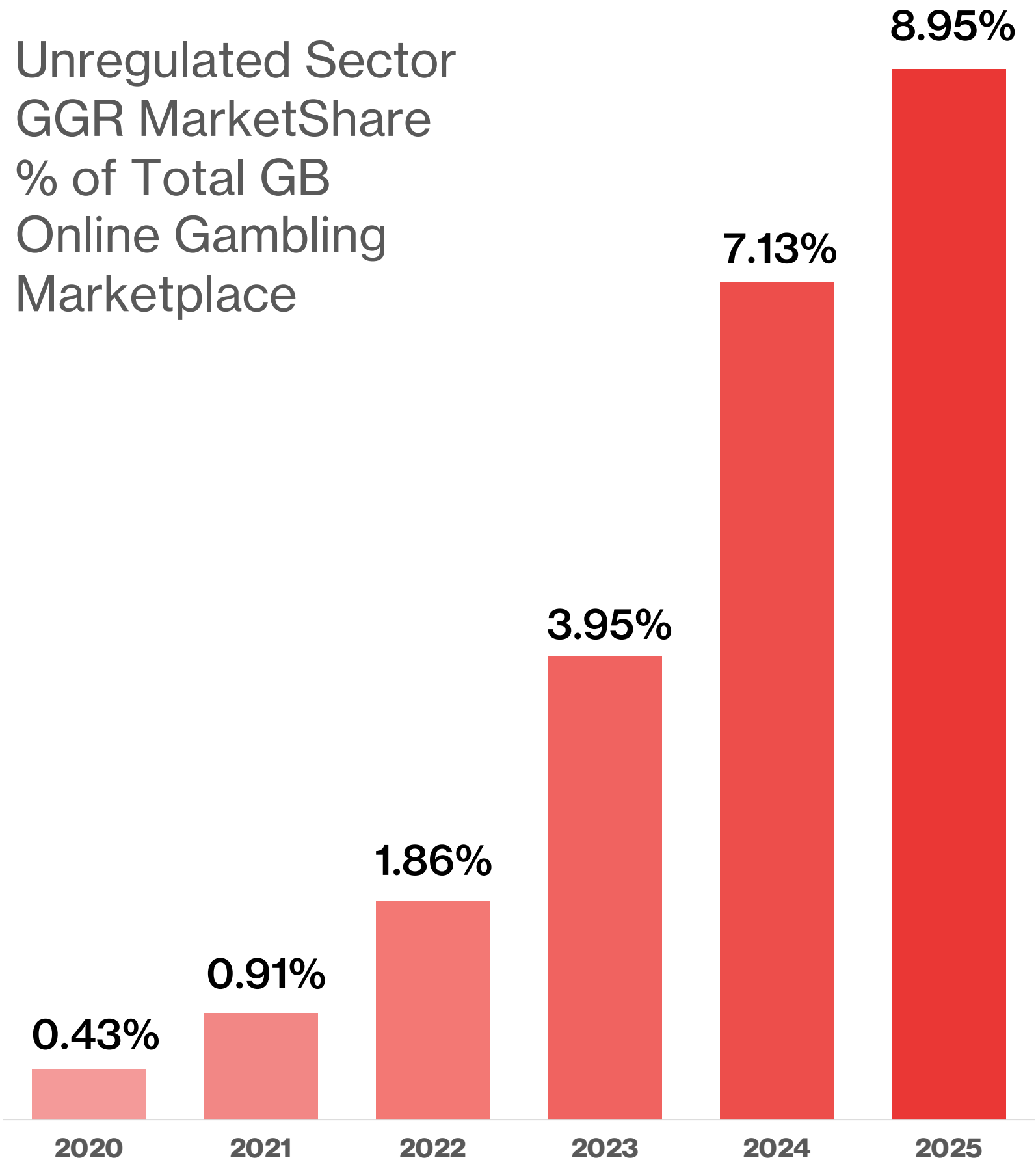


Total Product Splits

	% of Total Online Sports GGR	% of Total Online Casino GGR
Regulated	93%	90%
Unregulated	7%	10%

	Total Regulated Online GGR	Total Unregulated Online GGR
Sports	31%	25%
Casino	69%	75%

2020-2025: Unregulated Gambling Share



Streaming and Sports

Illegal stream views of 90+ seconds across the Top 10 sports in Great Britain

2024 Full Year: **3.1 billion**

2025 Full Year: **3.6 billion**



Illegal Streaming of Sports Events

Unregulated gambling ads featured on more than 80% of illegal streaming of sports content in the US and UK in 2024 and 2025.



Illegal Streaming Methodology: Core Processes

All of the Audience

The GCI platform monitors the internet to find instances of commercial and referral streaming content, traffic, audience, search, advertising popularity and more.



All of their Activity

Content is analysed, categorized and classified into legal and illegal groups, at the top level, and into splits by sports, movies, TV, events and more.



All of the Time

GCI prioritizes threats to revenue, market share, audience protection, content monetization, and consumer lifecycle, based upon the event calendar and content cycle.



Illegal stream views do not equal “the number of viewers.” This is because:

- Views will be duplicated: it is in the nature of illegal streaming to force viewers to refresh feeds to serve more advertising.
- Illegal stream views can be watched by many people simultaneously in real-life contexts, i.e. in bars and restaurants.

The Gray-Market Myth

Local Licensing for Regulated Operators

Benefits local commerce, community and consumers.



Has to abide by local jurisdictional law.



Has to safeguard consumers.



Has to accommodate self-exclusion schemes.



Has to follow protections for vulnerable communities and the exclusion of the underage.



International Licensing for Unregulated Operators

Benefits companies, not consumers or jurisdictions.



Presents "alternative" regulatory coverage.



Banking continuity.



Payment-processing coverage and resilience.



Jurisdictional "optionality."



The reality of "gray-market" licensing? It presents itself as an alternative to local licensing. Do these licenses allow operators to take money from any jurisdiction, without paying tax and obeying local rules? No, they do not. There is no alternative to the law of each jurisdiction and compliance with its rules, if you wish to take money from its consumers.

Campaign for Fairer Gambling: Conclusion

The total marketplace continues to grow annually, with the increase in the regulated sector of nearly £0.4 billion exceeding that in the unregulated sector at £0.2 billion. At under 9% of the total marketplace, the unregulated sector has less impact in GB than in any other major jurisdiction globally.

Only when the GamStop scheme self-exclusion numbers started rising did the illegal sector see a GB opportunity to market their products and services via the “Casinos not on GamStop” keyword and related phrases. If only the BGC had been willing to promote GamBan, this phenomenon would not have been as significant.

The spread between gaming and betting in the unregulated sector is greater than the same spread in the regulated sector. This contradicts the theory that the unregulated demand is for betting rather than gaming. This theory is promoted by anti-reformers who argue against appropriate tax and regulation of the legal sector.

The same anti-reformers quote unfounded speculative projections to paint a picture of the unregulated sector being far larger than it is. There is no possibility that the unregulated sector will ever generate over 50% of marketing spend, particularly when conventional marketing is not accessible to it.

There is no rationale for future unregulated turnover estimates of £17 billion or more being presented as an existential threat to the regulated sector. The 2019 betting shop machine stake reduction resulted in a decrease in revenue of £750 million in the first year as a consequence of a decrease in turnover of £25 billion. Claims that betting shop numbers would decrease to 4,500 are disproven by over 5,600 at the last count, despite the pandemic and bookmakers cross-selling to online gambling.

The truth about the unregulated sector must be made clear: the unregulated sector is illegal and organised criminality. Gamblers have no guarantee that the games are fair, that winnings will be paid, or that sites will not close with deposits being lost. This message is more important than the alleged safer gambling message of “Take Time to Think”. Describing the sector as not offering the same safety and protections as the regulated sector is just political posturing and missing the most important point.

Gaming Compliance International (GCI)

GCI is a proven leader in regulatory gaming compliance technology and consultancy, providing end-to-end oversight of the ever-expanding online and land-based gaming industry.

The focus at GCI is on enhancing revenue optimization, insight, and market transparency. We provide strategic results within the rapidly expanding regulated iGaming and sports betting industry, delivering complete oversight without interfering with day-to-day gaming operations.

GCI acquired Yield Sec in November 2025.

AS SEEN IN:

Bloomberg

The New York Times

Forbes

FORTUNE

FINANCIAL TIMES

**The
Guardian**

NOTABLE IMPACT:

US States

[Ohio Casino Control Commission \(OCCC\)](#) | [The Montana Department of Justice \(DOJ\)](#)

Forbes

[The Super Bowl 2025](#) | [US Prediction Markets](#) | [US Crypto](#)

Bloomberg

[71% of European Gambling is Illegal](#) | [GB Illegal Streaming](#) | [GB Crypto](#)

GCI: Multi-Level Monitoring

The GCI Platform incorporates:

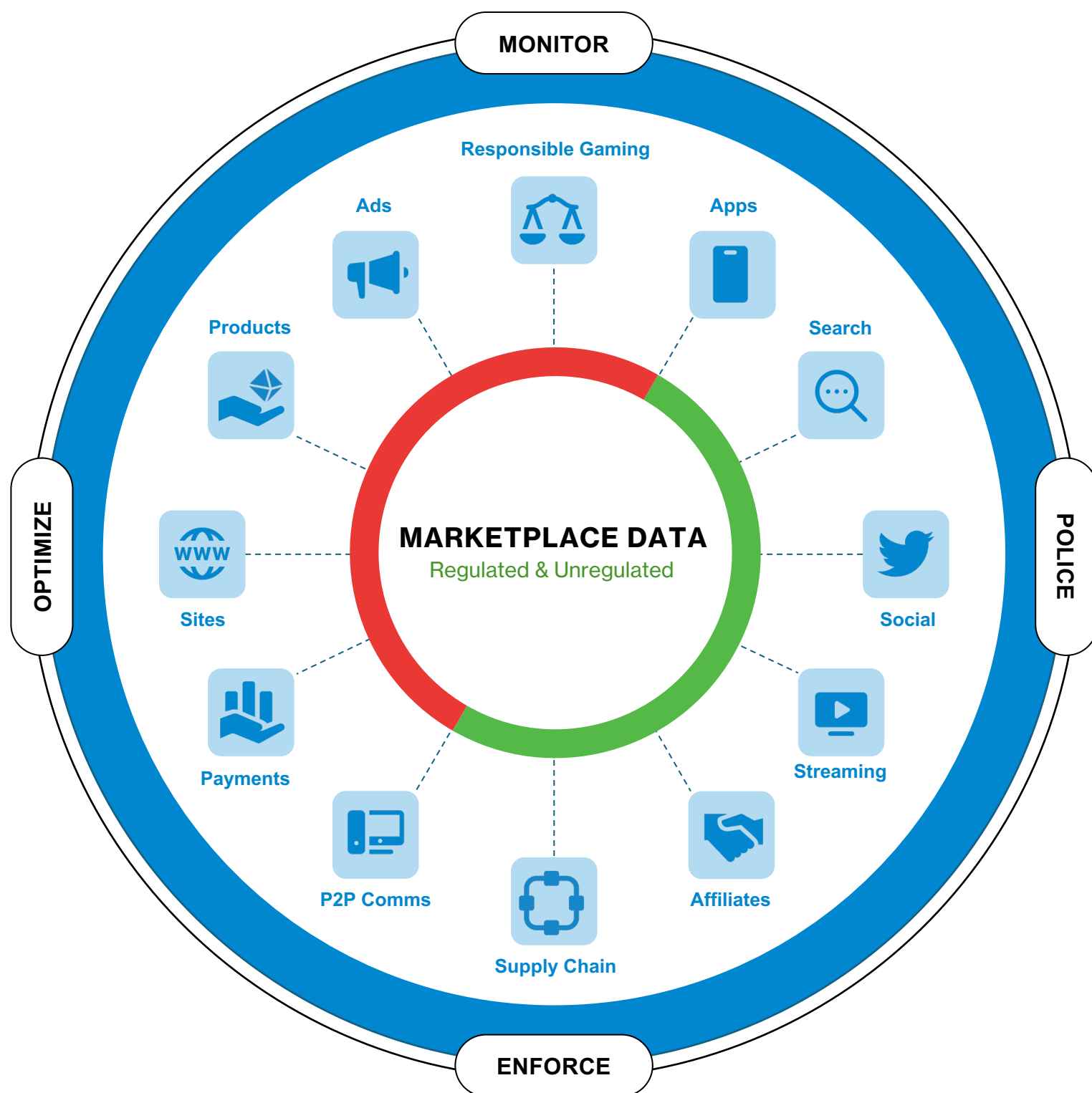
Integrated platform covering the regulated and unregulated sectors to present the total marketplace view. GCI data is from multiple sources (proprietary and third-party licensed).

Internal:

Monitoring, auditing, and reporting of regulated operator back offices.

External:

Monitoring and reporting across Audience and Activity, All of the Time, throughout the total marketplace.



GCI: GGR Methodology

MATRIX

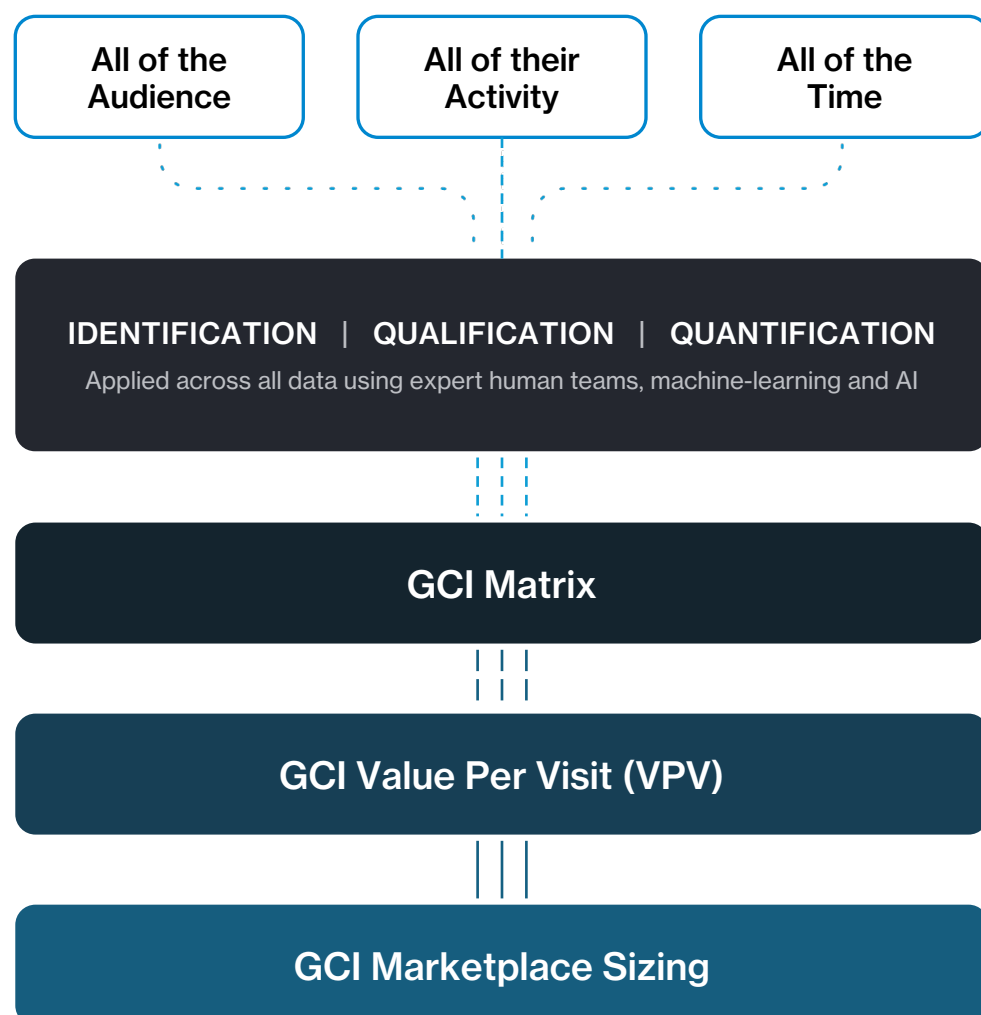
A rigorous site-versus-site and app-versus-app analysis that compares every transacting betting and gaming platform within a specific jurisdiction. All relevant data points are synthesized to deliver a single, core metric: Value per Visit.

VALUE PER VISIT (VPV)

Our VPV metric explains why different customers choose to spend more (or less) with regulated versus unregulated operators. We analyze specific criteria that drive player behavior including: KYC, product, price, promotion, payments, deposit thresholds, bonus earning terms, and more. By aggregating this data, we build a complete picture of customer value and engagement.

MARKETPLACE SIZING

By analyzing the complete picture of audience activity, we can accurately determine total GGR and precise market share percentages.



GCI: Notes on This Report

The following key notes apply across this report:

SIMPLE FINANCIAL DEFINITIONS: “Handle” – relates to the value of bets placed by consumers with online gambling operators. “Hold” – relates to the value left behind with online gambling operators, after customer winnings have been repaid. “GGR” – relates to Gross Gaming Revenue, or Customer Bets MINUS Customer Winnings EQUALS Gross Gaming Revenue.

PRODUCTS COVERED BY THE DATA IN THIS REPORT: SPORTS BETTING AND CASINO (INCLUDING POKER)

Throughout this report, online sports betting includes both traditional online sports betting and casino. Crypto products are included within sports betting and casino, and their respective regulated or unregulated positions. Products not covered by the data in this report: prediction markets, daily fantasy sports, sweepstakes, social casinos, prize draw contests, lotteries.

ONLINE ONLY: GCI covers the total online marketplace, including both regulated and unregulated online gambling. No retail or land-based data is included in our reporting.

TARGETING AND TRANSACTING: Only operators who actively target the jurisdictional marketplace through audience profiling, advertising, affiliate deals, audience accessibility (with and without a VPN) and featuring verified local resident payment abilities are classed and included as “unregulated” operators if they do not have local licensing for the jurisdiction they are taking revenue from.

AVAILABLE BUT NOT TRANSACTING: Operators who have an accessible website/app but without any active commercial ability (to place bets, make transactions and affect revenue) are not classed or included as “unregulated” operators.

UNREGULATED GAMBLING OPERATORS BY JURISDICTION: Each individual, active, transacting website or app that targets a specific marketplace but does not feature licensing for that jurisdiction, is counted as an “unregulated gambling operator” for that jurisdiction.

MIRRORS AND REDIRECTS: All active and transactable destinations for unregulated gambling operators are included in the number of total destination domains – the count of unregulated gambling operators. Each individual, active, transacting website or app that targets a specific marketplace with clear domain strategy redirects and mirrors – UnregulatedGambling.com, UnregulatedGambling123.com, etc. – is included as a separate unregulated gambling operator result for that jurisdiction.

ACCURACY: Our analysis derives from data obtained from our online surveillance as well as from third party licensors. Our assessment of large complex online marketplaces is limited by the availability and completeness of data. We are confident, however, that our platform provides by far the best analysis of online marketplaces possible.

ILLEGAL ONLINE STREAMING: Illegal online streaming refers to any streaming service that is not authorized, licensed, or otherwise permitted under the laws of a jurisdiction or by the relevant content rights holders, but which targets, is accessible to, and delivers content to consumers in that jurisdiction, whether provided “free of charge” or in exchange for payment, advertising, or other forms of commercial benefit.

GCI: Glossary (1/2)

REGULATED ONLINE GAMING: Regulated and licensed gambling platforms and products, subject to oversight within established legal frameworks, contributing to the Three Cs of Commerce, Community, and Consumers.

UNREGULATED ONLINE GAMBLING: Gambling platforms and products not authorized, licensed, or otherwise regulated under the laws of a jurisdiction, but targeting, accessible to, and transacting with consumers in that jurisdiction.

UNACKNOWLEDGED AS ONLINE GAMBLING: Platforms and products that operationally replicate gambling (stake, uncertainty, reward) but are not currently classified as gaming, betting, or lotteries.

ACTIVITY: All states of online behavior, everything from browsing (looking) through to buying (transacting).

AFFILIATES: For-profit groups across websites, apps and social media which engage audiences with content including reviews, comparisons, special offers, promotions, discounts, and news, to move that audience on to commercial opportunities with online gambling operators in return for a fee or a share of customer revenue, and often both.

AUDIENCE: All potential, unique human beings in a specific jurisdiction using online services (including the underaged).

AUDIENCE EXPOSURE: The impact of gambling and related content upon the audience across a blended view of the Twelve Ecosystem Essentials (affiliates, sites, payments, social media platforms, responsible gaming, advertisements, streaming, peer-to-peer communications, supply chain, search/LLMs, products and apps). The audience exposure measure is a useful “early warning indicator” of where GGR market share split could flow in the future.

BLACK MARKET: A commonly used term for unregulated gambling operators and activities. However, it can be misleading, as it suggests a separate or distinct marketplace. In reality, black-market operators function within the same consumer ecosystem as regulated offerings, without authorization and outside legal and regulatory frameworks, extracting value from the regulated sector and from government via lost tax revenue. At GCI, the term is used in defined contexts such as “black-market mitigation.”

GCI: Glossary (2/2)

ILLEGAL ONLINE STREAMING: Illegal online streaming refers to any streaming service that is not authorized, licensed, or otherwise permitted under the laws of a jurisdiction or by the relevant content rights holders, but which targets, is accessible to, and delivers content to consumers in that jurisdiction, whether provided “free of charge” or in exchange for payment, advertising, or other forms of commercial benefit.

INTERACTION / INTERACTING: Consumer engagement with an operator. The consumer is doing more than simply “seeing” content: a consumer has engaged with it by clicking on ads, registering with websites, liking social posts, etcetera, anything that has amended their current and future experience online – due to the algorithms and cookies – in favor of greater future exposure with operators.

MIRRORS AND REDIRECTS: Websites and apps used for audience accessibility and to avoid jurisdiction blacklists and blocklists. Mirrors and redirects are effectively “back doors” into online gambling operator destinations that the audience will have no knowledge concerning.

TOTAL ONLINE MARKETPLACE: There is only one marketplace in a jurisdiction. Unfortunately, it features two industries: one regulated, one unregulated. To get to total, you must consider and add regulated plus unregulated.

TRAFFIC CHANNELIZATION: All visits across the entire marketplace broken out by share of operator and regulated or unregulated.

TRAFFIC VOLUME: The volume of visits made by the online audience to online opportunities.

UNIQUE AUDIENCE SHARE: Unique audience member visits on an operator-specific basis, broken out by share.

UNIQUES VOLUME: The volume of unique human beings using specific online services.

VISITORS: Unique human beings visiting pages across a site – no matter the pages they visit, they are still one unique user over the time period.

VISITS: The pages unique human beings visit across a site, and the traffic created from this. One unique human will visit many pages on a site for different products, processes, bets, games, etc.

Contacts & Questions



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