



# Online Gambling (U.K.)

April 18, 2020



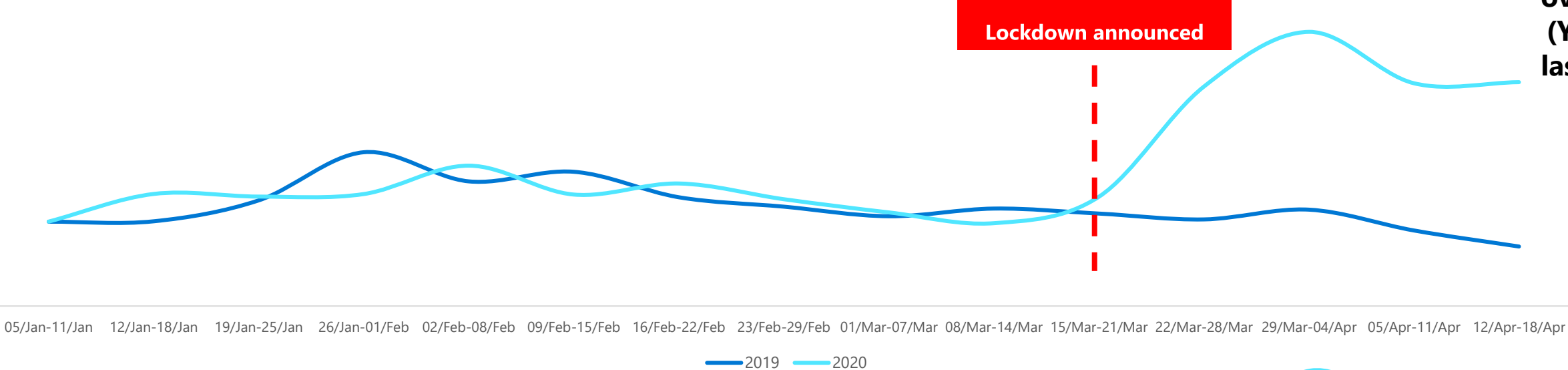
## Hypothesis

With continued lockdown and zero event situation, people are continuing to gamble across Bingo, Casino, Poker and Lottery in the UK

# Non-Sportsbook gambling continues to be gambler's new choice

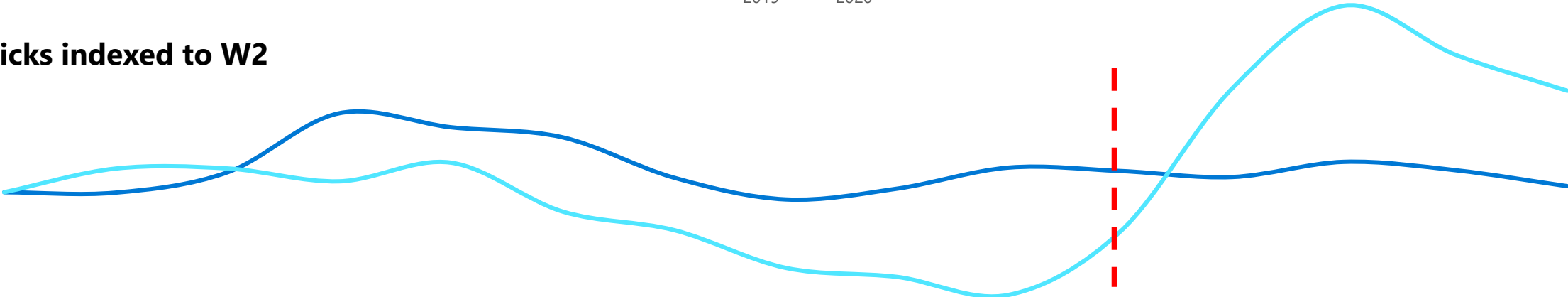
Search query volume indexed to week 2 starting 5<sup>th</sup> Jan 2020

40% Year over Year (YoY) on last week



Clicks indexed to W2

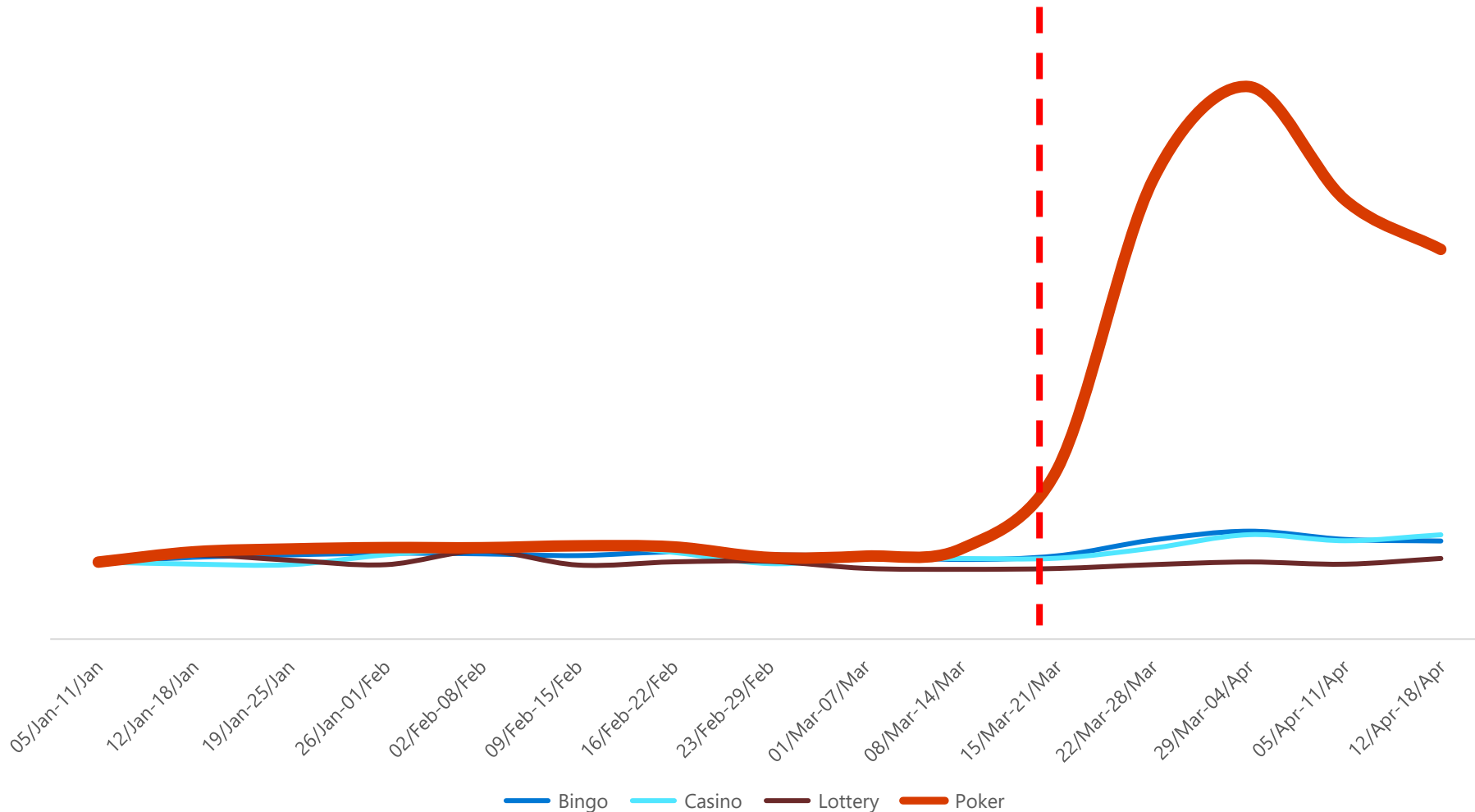
7% YoY on last week



Source: Microsoft Internal Data

# Poker continues to be popular

Search query volume indexed to week starting 05-Jan 2020



## Query samples

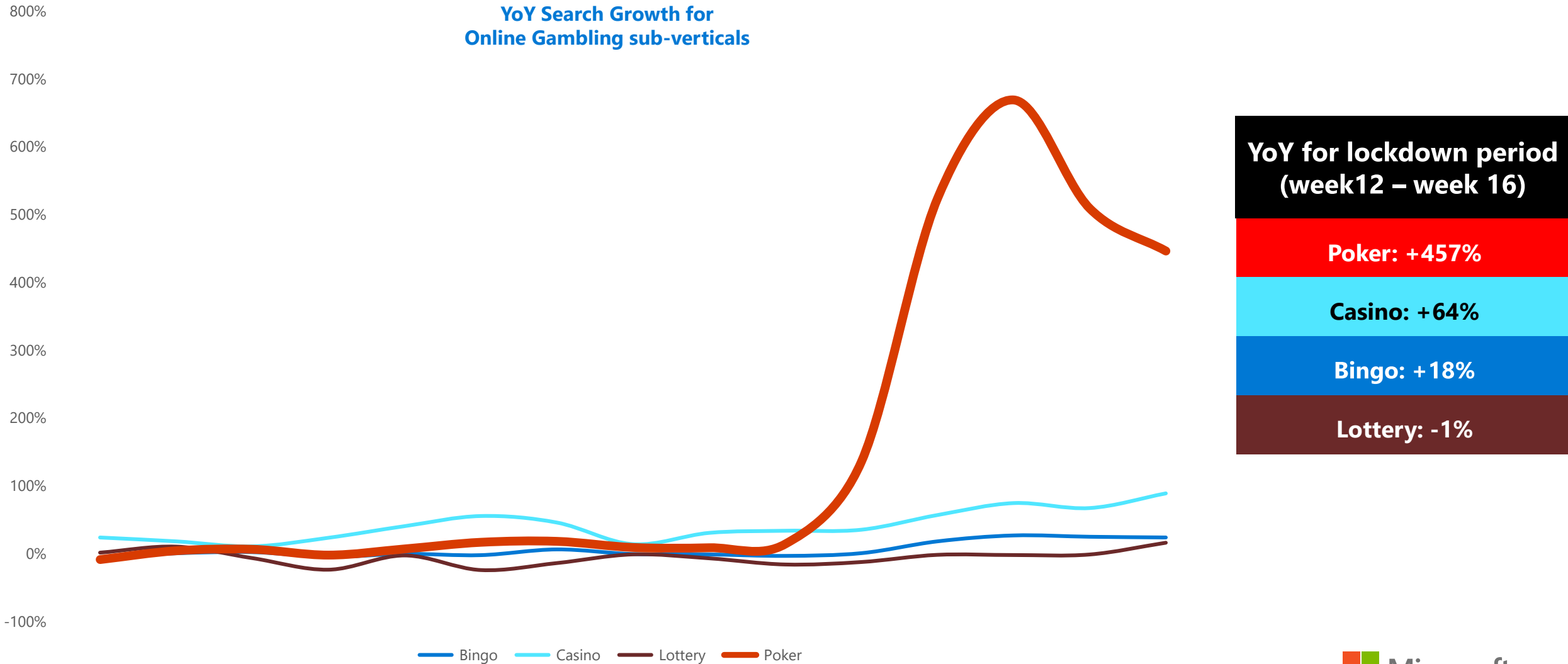
**Bingo:** "Bingo sites", "Bingo", "Bingo UK" "Tombola"

**Casino:** "Monopoly casino", "Best casino", "Casinos"

**Lottery:** "National lottery", "Lottery UK", "Lottery"

**Poker:** "Poker", "Free poker", "Play poker"

# Will poker popularity continue to grow after the lockdown?



YoY for lockdown period (week12 – week 16)

<b>Poker: +457%</b>
<b>Casino: +64%</b>
<b>Bingo: +18%</b>
<b>Lottery: -1%</b>

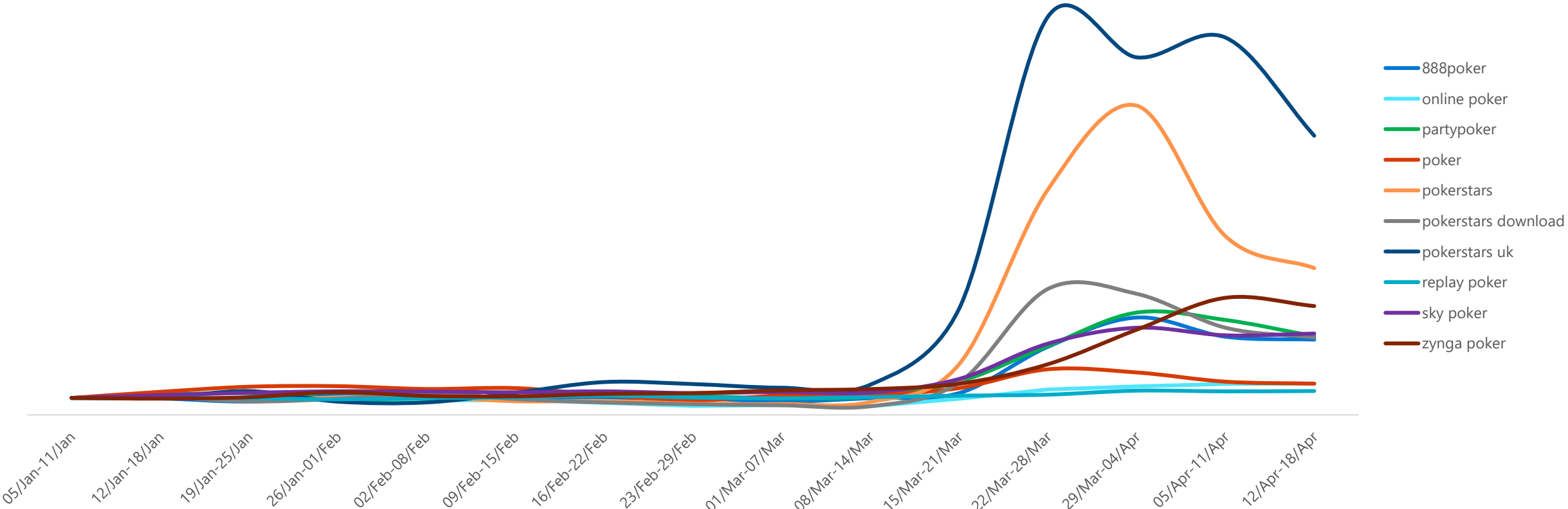


Source: Microsoft Internal Data.  
Post lockdown = week 12 to week 16 (15/03 – 18/04)

# Poker competition has increased in recent weeks of lockdown

Pokerstars has been most popular, but other brands continue to enjoy slightly lower but consistent growth

Search query volume indexed to week 2 starting 5th Jan 2020



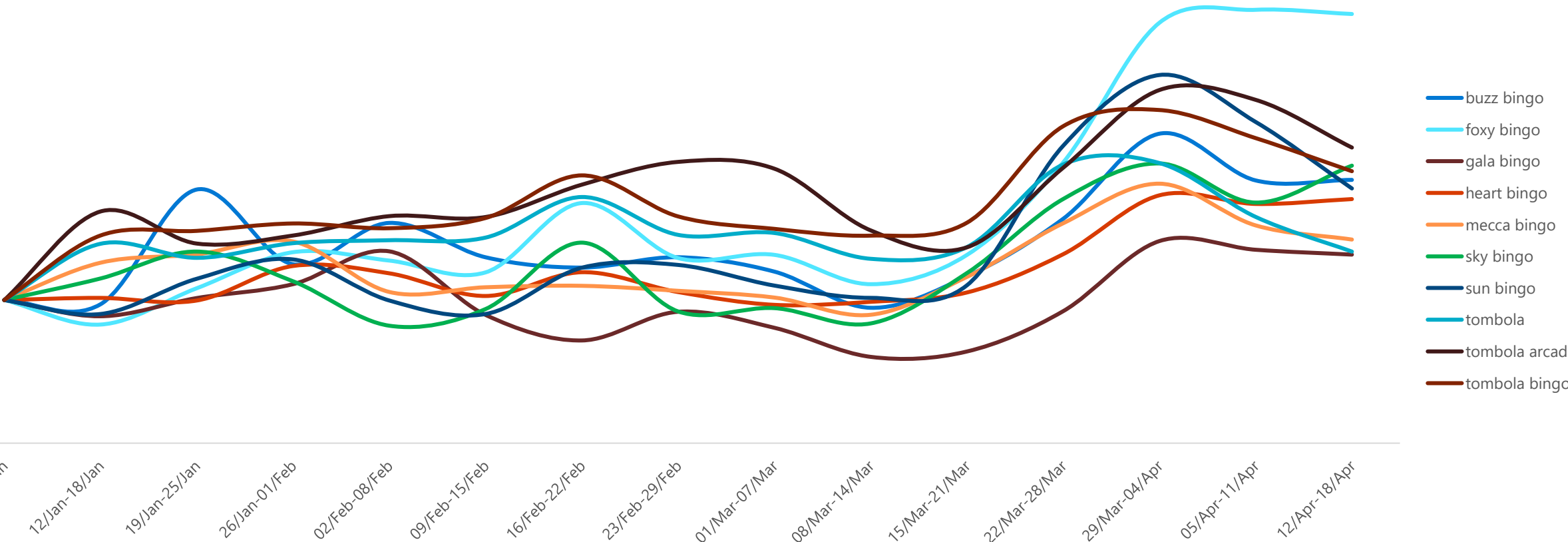
Source: Microsoft Internal Data  
\*Searches indexed to 2<sup>nd</sup> calendar week in January \*\*YoY query calculation based on year to date on 21<sup>st</sup> March with minimum of 1000 Searches



# Bonus and offers drive bingo consumers to choose their brands

Tombola is the most popular brand, with close and increased competition from other players since the lockdown

Search query volume indexed to week 2 starting 5th Jan 2020



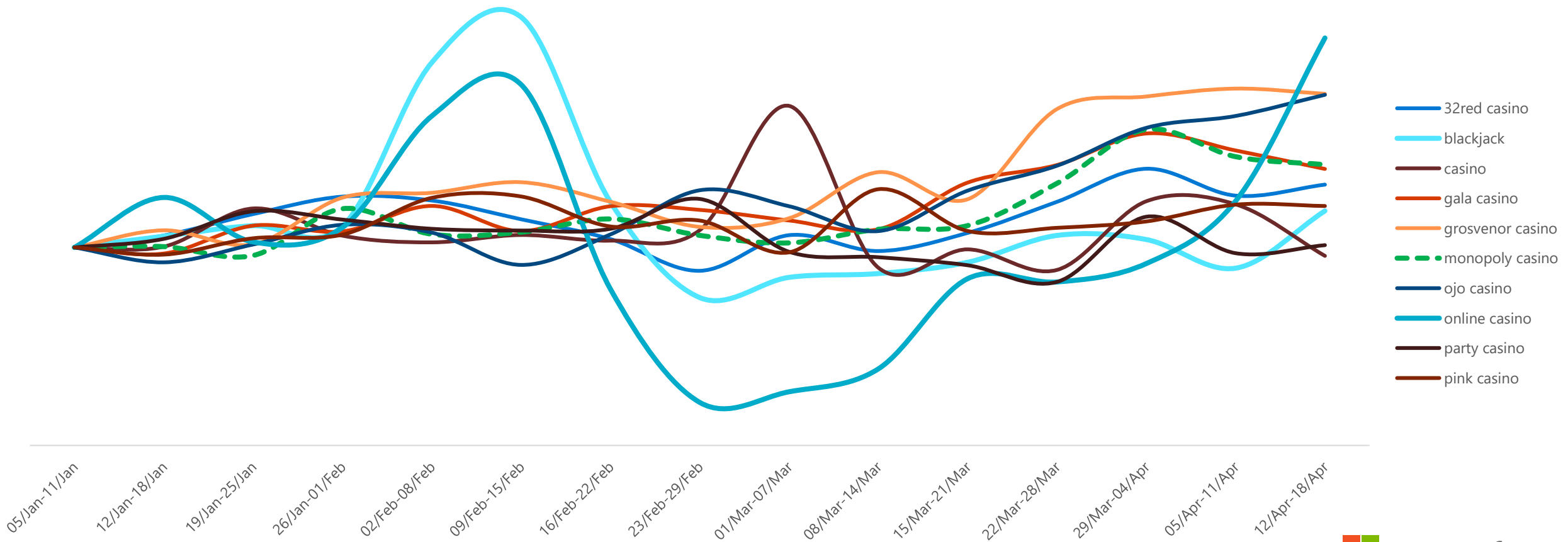
Source: Microsoft Internal Data  
\*Searches indexed to 2<sup>nd</sup> calendar week in January \*\*YoY query calculation based on year to date on 21<sup>st</sup> March with minimum of 1000 searches



# Generics are critical as casino players continue to look for offers

Monopoly is the most popular brand, but strong competition since the lockdown

Search query volume indexed to week 2 starting 5th Jan 2020



Source: Microsoft Internal Data

\*Searches indexed to 2<sup>nd</sup> calendar week in January \*\*YoY query calculation based on year to date 21<sup>st</sup> March with minimum of 1000 searches

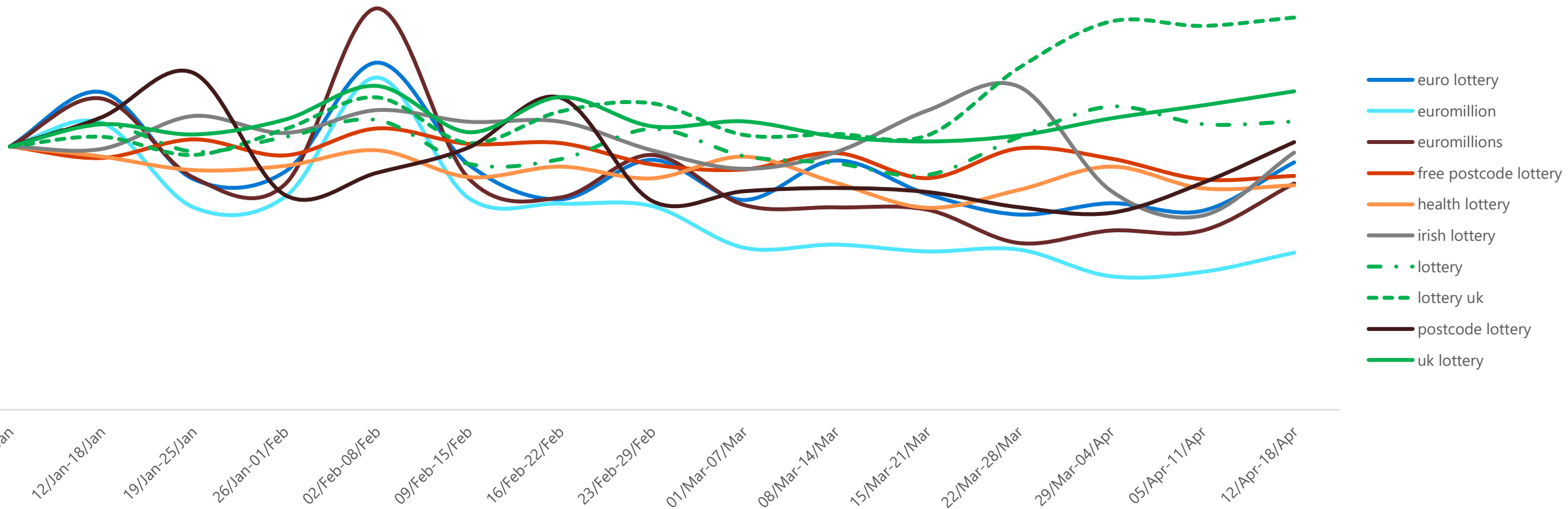




# Generics are critical for lottery more than ever

Brands are mostly indexing flat or low compared to beginning of Jan 2020

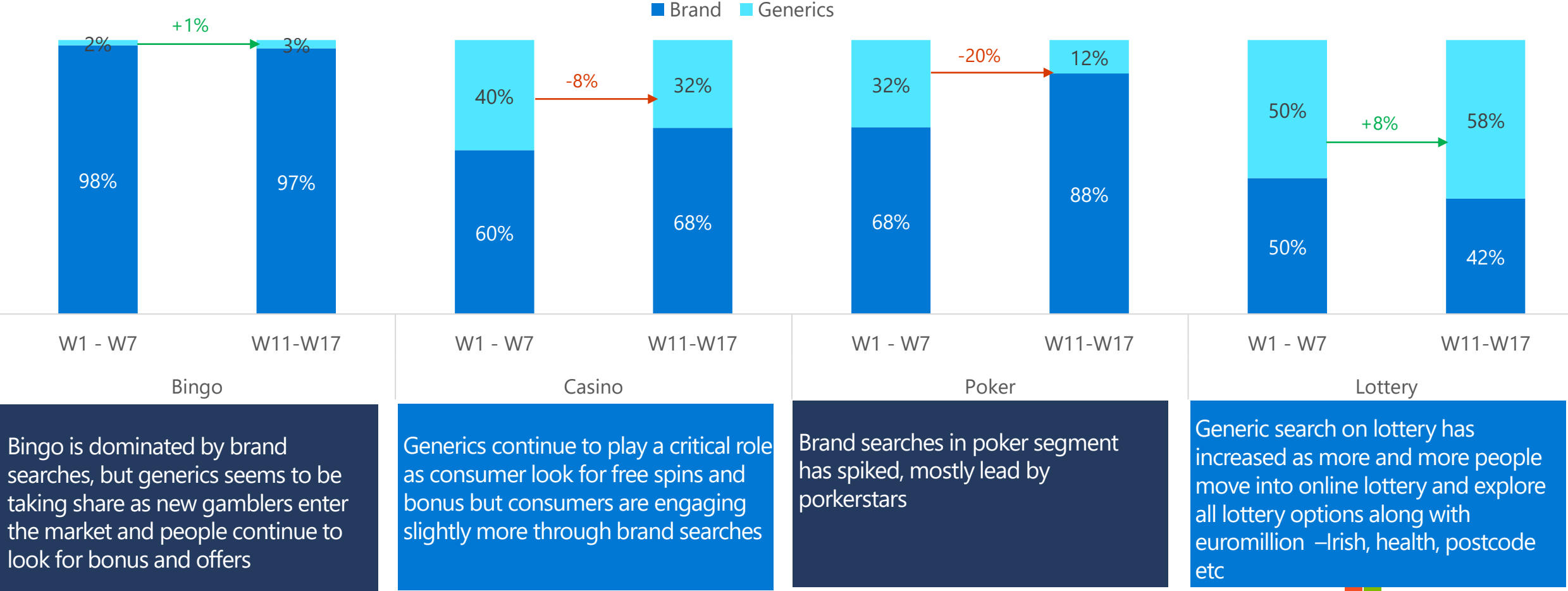
Search query volume indexed to week 2 starting 5th Jan 2020



Source: Microsoft Internal Data  
\*Searches indexed to 2<sup>nd</sup> calendar week in January \*\*YoY query calculation based on year to date on 21<sup>st</sup> March with minimum of 1000 Searches

# Generics are critical than ever before as consumers look for new brands and better offers and bonus

Brand vs. generics volume split comparison between pre-lockdown to lockdown period



Bingo is dominated by brand searches, but generics seems to be taking share as new gamblers enter the market and people continue to look for bonus and offers

Generics continue to play a critical role as consumer look for free spins and bonus but consumers are engaging slightly more through brand searches

Brand searches in poker segment has spiked, mostly lead by pokerstars

Generic search on lottery has increased as more and more people move into online lottery and explore all lottery options along with euromillion –Irish, health, postcode etc



Source: Microsoft Internal Data  
 W1 (week 1) starting 5<sup>th</sup> Jan; W11 (week 11) starting 15<sup>th</sup> Mar

## UK: Top 5 volume searches by category

Bingo	Casino	Lottery	Poker
Tombola	Monopoly casino	Lottery	Pokerstars
Tombola bingo	8 ball casino	Euromillions	Sky poker
Gala bingo	Grosvenor casino	Postcode lottery	Pokerstars uk
Mecca bingo	Online casino	Lottery uk	Poker
Heart bingo	Casino	National lottery	Replay poker

## UK: Top 5 volume searches YoY by category

Bingo	Casino	Lottery	Poker
Sun bingo online	Arcade game	Postcode lottery winners today	Wsop poker
Sky bingo online	Bronze casino	Play lottery online	Pokerstars UK
Palaces bingo	Best casino	Irish lottery	Texas holdem poker
Mecca bingo online	Online casino	Lottery online	Grosvenor poker
Heart bingo UK	casino	Health lottery uk	Pokerstars

# Conclusions and recommendations

## Generics are critical than ever before

Expand your generic campaigns to capture new & existing gamblers looking for best offers and bonus

## Review and revise your ad copies

1. Review your ad copies to reflect current situation's sentiments and offers
2. Ensure to have all the relevant ad extensions for maximum visibility
3. Tailor your ads for new vs. existing gamblers in the market where appropriate

## Update your Poker campaigns

Poker has gained popularity since the lockdown (highest YoY growth). Ensure your campaigns are up-to-date (budget, keywords, ad copies, tracking) to capture this spiking trend