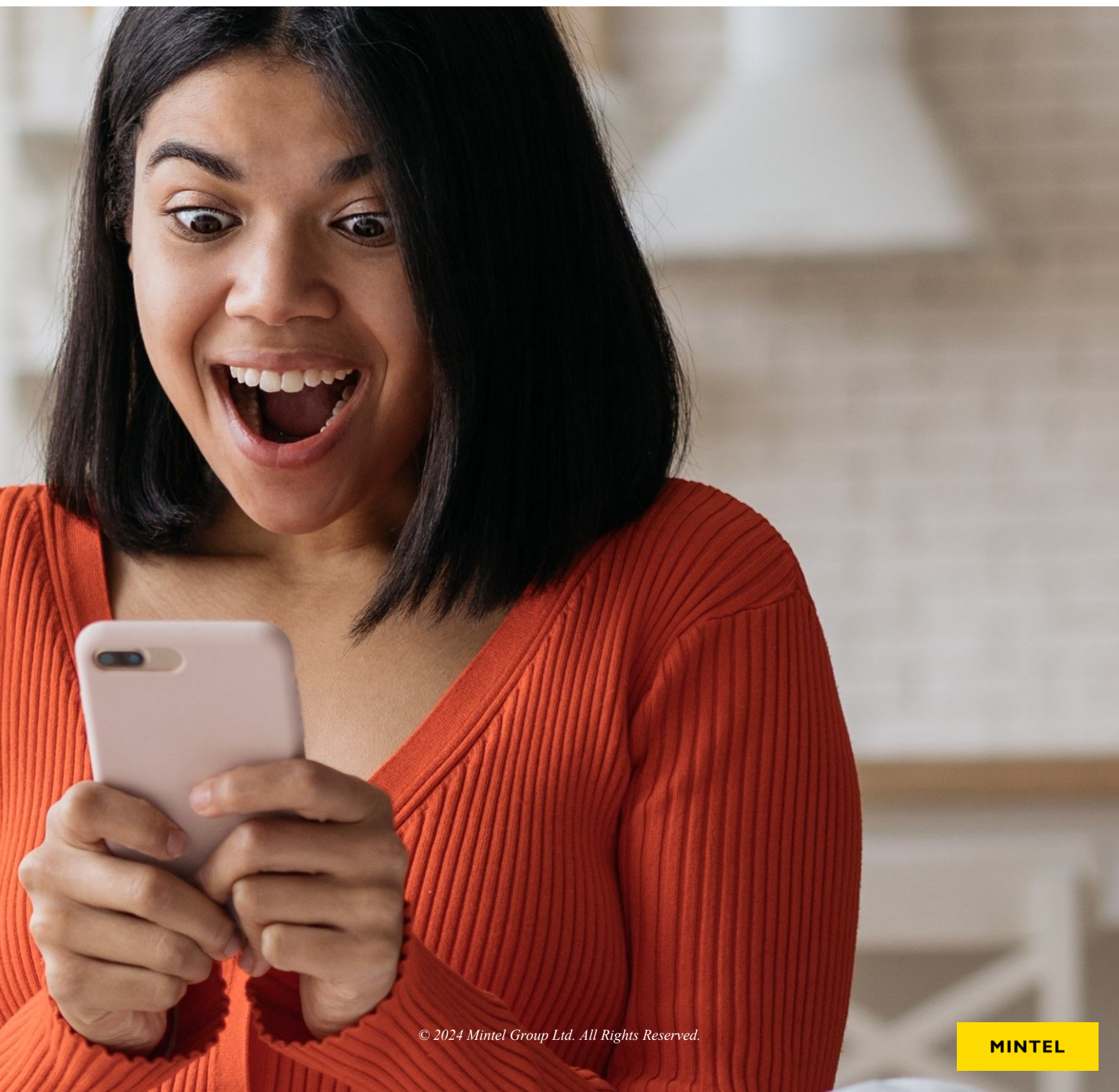


# GAMBLING & LOTTERIES – GERMANY – 2023

While online gambling drives growth, brands need to focus on consumer protection and responsible gambling. To attract non-gamblers, brands should promote the fun side of gambling more strongly to improve their image.



Silvia Hondt, Research  
Analyst - Travel & Leisure



# Gambling & Lotteries - Germany - 2023

## This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on the gambling market, including changing gambling behaviour
- Germans' participation in gambling activities
- Frequency and reasons for gambling
- Perception of gambling activities and routes to appeal to non-gamblers and recreational gamblers
- The legalisation of online gambling and resulting behaviours and responsibilities

## Overview

Inflation rates are expected to remain high (6%) in 2023, inducing financial concerns among consumers. Hence, the rising cost of living means that, in 2023, **gamblers are likely to gamble less often (58%) and wager less money when gambling (61%)** than they usually do, slowing market value growth.

While inflation threatens the market, the legalisation of online gambling in Germany in 2021 offers significant growth opportunities. **61% of gamblers** think online gambling is more convenient than gambling at venues. **Brands can capitalise on convenient online offers** and position online gambling as the cheaper alternative compared to gambling at venues.

Gambling, however, has a rather bad reputation among Germans at **56%**, due to the negative effects of gambling. Brands need to **focus on responsible gambling and consumer**



While online gambling drives growth, brands need to focus on consumer protection and responsible gambling. To attract non-gamblers, brands should promote the fun side of gambling more strongly to improve their image.

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**protection whilst promoting the positive sides of gambling** more strongly. This will help to broaden the target group of recreational gamblers.

Surprisingly, despite their affinity with digital technology, younger males under 25 were more likely to participate in lotteries at venues (21%) than in online lotteries (15%) in 2022. In line with Mintel Trend Pillar *Nostalgia*, this presents a **chance for venues to create unique value** compared to online gambling with special experiences.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five-year outlook for gambling & lotteries

### Market context

- Gamblers need to balance their spending
- Legalisation of online gambling is driving transformation of the market
- Experience is all

### Mintel predicts

- Market size & forecast
- Online gambling will continue to drive value growth

### Opportunities

- Keep consumers engaged during the cost-of-living crisis
- Leverage the benefits of online gambling
- Focus on player protection and responsible gambling
- Promote the fun side of gambling to broaden target groups
- Quick download resources

## MARKET DRIVERS

### The German economy

- The cost of living crisis is holding back the post-COVID-19 recovery
  - Graph 1: key economic data, in real terms, 2019-24
- Inflation continues to be the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

### The impact of the economy on gambling and lotteries

- Take Germans' squeezed budgets into account...
- ...and benefit from broad target groups

### Legal framework

- New legal regulations are changing the gambling market
- The gambling market is poised between legalisation and restrictions

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- Close monitoring by the Joint Gambling Authority of the Federal States

## The impact of gambling

- Consider the positive effects of gambling...
- ...but put a spotlight on the negative effects to ensure player protection
- ...but put a spot on the negative effects to ensure player protection
- Support users to protect their mental health
- Focus on recreational gamblers, instead of high-risk players
  - Graph 2: proportion of gamblers with problematic gambling habits according to the SOGS, 2009-19

## Experiences

- Make in-person offers extra-valuable

## WHAT CONSUMERS WANT AND WHY

### Gambling participation

- Gambling enjoys great popularity among Germans
  - Graph 3: participation in gambling activities in the past year, NET, 2023
- Gambling enjoys great popularity among Germans
- Promote positive effects of recreational gambling to engage females more strongly
- Focus on the key target group for gambling offers
  - Graph 4: participation in gambling activities in the past year, NET, 2023
- Improve player protection for online gambling
- Use gamification to appeal to young males...
- ...and promote online poker more strongly to them
- Tap into legal promotion on Twitch
- Betting providers: regain fans' sympathy through transparency
- Lotteries: leverage nostalgia in lottery venues

### Gambling frequency

- Germans gamble on a regular basis
- Help consumers to control gambling habits in tough economic times...
  - Graph 5: changes in gambling participation, by financial situation, 2023
- ...and promote responsible gambling
- Make gambling more routine to target Baby Boomers

### Reasons for gambling

- Germans dream of the big jackpot
- Appeal to Gen Z with fun gambling activities
- Capitalise on social aspects to keep up sales in tough economic times

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- Reasons for gambling differ depending on the gambling activity
  - Graph 6: reasons to gamble, by type of gambling activity, 2023
- Reasons for gambling differ depending on the gambling activity
- Help younger Germans to pass spare time with smartphone-friendly gambling activities...
- ...and promote slots as 'short' entertainment

### Perceptions of gambling activities

- Lottery games stand out from the crowd
  - Graph 7: perception of gambling activities, 2023
- Lottery games stand out from the crowd
- Improve the image of gambling activities...
  - ...with a stronger focus on positive associations
    - Graph 8: perception of gambling activities, by gamblers, 2023
  - ...with a stronger focus on positive associations
    - Graph 9: perception of gambling activities, by non-gamblers, 2023
- Leverage the fun side of gambling
- Learn from lotteries to offer low-threshold games

### Gambling behaviour

- Gambling brands need to take squeezed incomes into account
  - Graph 10: gambling behaviour of gamblers, 2023
- Keep consumers engaged during the cost-of-living crisis
- Casino providers: tap into special events and modernise dress codes
- Online gambling: promote convenience...
  - ...and legalisation more strongly
- Leverage social responsibility to improve gambling's image
  - Graph 11: gambling behaviour of Germans, 2023
- Leverage social responsibility to improve the image of gambling

## LAUNCH ACTIVITY AND INNOVATION

- Mernov obtains the first German licence for virtual slot machines
- OASIS player-blocking system is used for player protection
- Use new technology to reduce cost

### Advertising and marketing activity

- Samble promotes app solution for gamblers
- Tipico takes the position of the top dog for itself
- bwin leverages the social aspects of fan groups
- StarGames focuses on the positive impacts of gambling

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- JackpotPiraten focuses on communicating the legalisation of online offers
- Lotto24 shows convenience of online lottery offers to older age groups
- Casino Baden-Baden taps into responsible gambling

## MARKET SHARE

- Market share of illegal gambling offers is decreasing

## MARKET SIZE, SEGMENTATION AND FORECAST

- Regulatory changes imply strong growth after COVID-19-induced drop in value
- Legalisation is the key driver for value growth
- Sports betting: the clear winner of recent years
- Casino and slot machine providers need to focus on online offers
- Lotteries benefit from popularity among Germans
- Online gambling will continue to drive value growth
- Further legalisation will help to increase value in the short term
- Value growth expected in the mid term
- Technical developments offer long-term growth opportunities

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- Correspondence analysis methodology
- A note on language

### Appendix – market size and central forecast methodology (if applicable)

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value

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