

## Gambling Habits - UK - December 2010

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### What is this report about?

The UK gambling market, and particularly its land-based sector, begins a new decade still trying to recover ground lost in the last following the implementation of the smoking ban and the Gambling Act, and does so in the knowledge that it is no longer as recession-proof as it was two decades ago. This report provides a snapshot of the market at the end of 2010, assessing patterns of participation among consumers, their attitudes towards gambling, and the performance and prospects of the industry in continuing difficult economic conditions.

### What have we found out?

- Consumer expenditure on land-based gambling remains some way below its 2005-06 peak, but has stabilised at around the £7.5 billion mark annually. National Lottery products and gaming machines are the only sectors currently experiencing profit growth, although the betting segment could join them if triple-digit growth in sports betting revenues can be sustained to compensate for decline in horse and greyhound racing trade.
- Betting remains the industry's largest sector, in terms of turnover, outlets and penetration, although use of online sportsbooks, casinos and poker rooms is growing most rapidly. Sports betting on all platforms could soon overtake National Lottery scratchcards as the country's second most popular form of gambling.
- Men appear to have become more interested in the life-changing jackpot prizes offered by National Lottery draws. They are following up this interest online rather than in retail outlets, where Lottery gambling remains female-led.
- The efforts of the casino and bingo club sectors to cope with the effects of the smoking ban by enabling customers to play while they smoke outdoors have had only limited success. A more fundamental revision of the link between smoking and gambling may be required to create a clear demarcation between the two activities that encourages customers to think of each in isolation.
- Spectator sports stadia look to have significant potential as gambling venues through the core demographics they share with the online sector in particular. In-stadium betting outlets are already serving this audience but the bigger opportunity may be in tailored mobile products that can engage spectators in the event's betting markets without them having to leave their seat.
- Taxation and legislation remain the major barriers to supply-side growth and improved profitability, with January's VAT rise expected to damage the low-stake end of the market – particularly gaming machines – where increases are hardest to pass on to the consumer.

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