

## Betting Shops - UK - March 2011

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### What is this report about?

There are more licensed betting offices (LBOs) in the UK than any other type of gambling venue, and the retail sector still generates up to three times as much profit and revenue for the major operators as do online betting and gaming.

This report assesses the state of the UK betting shops market in early 2011, analysing consumers' attitudes towards LBOs and their habits in using them, and paying particular attention to the changing nature of the sector's product mix. In so doing, it tests the hypothesis that "betting shops must refresh their horseracing customer base to prevent decline in the sector reaching a pace that cannot be compensated for by growth in football betting and gaming machines alone".

### What have we found out?

- The recession is considered to have pushed the betting shop market into decline in recent years, but the first signs of a return to growth are visible with the market expected to increase in value by 2% in 2010-11 to £2.8 billion.
- The balance of customer expenditure in the betting shop market is now reaching the point at which gaming machines are as valuable as traditional OTC trade.
- Despite the ongoing decline of betting on horseracing, it remains by far the dominant player in the OTC mix, generating more than half of gross profit and turnover in 2009-10.
- Those who bet on football are highly likely to be frequent betting shops visitors. 28% of these consumers visit once a month or more, compared with 11% of those who bet on horseracing. This reflects the appeal of horseracing's flagship events that may only attract punters once or twice a year.
- Some 21% of all consumers see betting shops as 'unwelcoming' places, and this figure does not even fall significantly amongst those who have been to betting shops (18% agree with this perception). Younger consumers and more upscale socio-economic groups are most likely to perceive shops as unwelcoming, although women are no more likely than men to do so.
- Calls to action are still a strong driver of business for betting shops, with around one in five betting shop visitors say they only ever bet occasionally when something prompts them to.

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