

Betting Shops - UK - March 2012

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Operators' increasing reliance on the rising profitability of gaming machines will pressure them to find new ways of sustaining that trend, which could in turn distract them from solving the long-standing problems of an OTC segment in which horseracing's decline continues.

2012 will be a year of opportunity in delivering two of the major events – football's European Championships and the London Olympics – that can attract the occasional bettors the industry needs to convert into more regular shop visitors, while 2013 could see some legislative and regulatory movement in the industry's favour too."

– David Walmsley, Senior Leisure Analyst

In this report we answer the key questions:

- How can betting shops encourage occasional customers to visit more often?
- Will the London Olympics boost business for betting shops?
- Can betting shops rely on machine revenues continuing to rise?
- How can shops stem the ongoing decline in horserace betting?
- How big a threat to retail betting is the rise of online leisure?
- Can the industry expect any help from government?

Betting shops may carry something of an old-fashioned image in a leisure market shaped increasingly by technology and the web, but they remain the engine of the UK's gambling industry on almost every measure.

However, betting shops continue to lean heavily on a comparatively small core customer base, have been sustained in recent years by an extended boom in gaming machine play, and remain in the eyes of most consumers a very occasional destination for a 'major event' wager at best.

This report assesses current patterns of UK adults' betting shop visiting and expenditure habits, examines the relative strength of the main incentives and barriers to visiting, and identifies ways in which operators can respond to some of the main opportunities and challenges emerging.

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