

## Gambling Review - UK - April 2013

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*"Consumers still prefer to visit bricks-and-mortar venues, however, land-based gambling sectors will have to adjust and improve their offering, as the online channel continues to grow as odds and payouts can often exceed those offered in venues. As a result, service and experience is likely to become increasingly important."*

– Paul Davies, Senior Leisure Analyst

### In this report we answer the key questions:

- Will the National Lottery's near monopoly be threatened by new entrants?
- Are stores still convenient, or has online made gambling more accessible?
- Are betting shops over-reliant on gaming machines?
- Do casinos and bingo halls need a facelift in order to attract more consumers?

The UK's land-based gambling market appears to have recovered from a period in which gambling legislation, a difficult economy and the impact of the smoking ban had a negative effect on some sectors.

The rise in popularity of B2 gaming machines, particularly in betting shops, has protected bricks-and-mortar premises from the rise of online betting, which is starting to hurt over-the-counter (OTC) business.

The lottery is one sector that has continued to perform well, with internal competition proving to be the biggest potential threat to the National Lottery's dominance looking ahead.

Whilst casinos and bingo clubs generally look to consolidate and stabilise in what remain testing environments, the projections for the former look more optimistic.

This report analyses current trends in consumers' gambling habits, the threat of the online and mobile channels, people's attitudes towards gambling, as well as the levels of interest in alternative games and activities.

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