

Casinos (including Online) - UK - September 2010

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What is this report about?

It is now three years since the introduction of the Gambling Act fundamentally changed the regulatory environment in which the UK casino industry operates, yet the market is still coming to terms with its full impact.

This report assesses the industry's recent responses to the challenges of new legislation and the recession and anticipates potential future trends and opportunities, by examining the hypothesis that "the normalisation of gambling as a mainstream leisure activity is creating an opportunity for both land-based and online casinos to increase their market share".

What have we found out?

- Growth in online casino gambling has compensated for a continued decline in land-based venues, with total casino expenditure in the UK expected to hit £1.15 billion in 2010 – up 2.7% on 2009.
- Admission growth has not translated into increased revenues, as new customers have tended to be more casual and lower spending in nature, particularly where table gaming is concerned.
- Fear of losing more than they can afford remains a real barrier preventing many people from visiting casinos. This is a particularly strong deterrent for women and younger consumers.
- Growth in the number of one-person households is driving up demand for online entertainment, including gambling, as well as creating a need for out-of-home socialising that venues like casinos can tap into.
- Current and potential casino visitors are more likely than lapsed visitors to be motivated to go to casinos by recommendations from friends and family. Word of mouth could therefore affect loyalty to particular casinos amongst current visitors, or help get potential players through the door.
- Extra entertainment and variety of games in casinos appeal most to the younger age groups within which casino visiting is already comparatively strong. However, elements of customer service and value for money are of particular importance to 25-44-year-olds – the age range within which consumers are most likely to lose the visiting habit.

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EMEA: +44 (0)20 7778 7151
Americas: +1 (312) 932 0600
APAC: +61 (0)2 8284 8100