

Gambling Review - UK - April 2014

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"Remote competition and the threat of increased regulation vary in strength from segment to segment but all can use new technology to first level the playing field with online and then enhance and differentiate the live venue experience itself."

– David Walmsley, Senior Leisure Analyst

This report looks at the following areas:

- Who is feeling the heat from online competition?
- Can technology really transform the venue experience?
- Does the industry face a return to regulation?

Consumer expenditure on gambling continued to rise in 2013/14, fuelled by rising lottery sales and the ongoing machine gaming boom in betting shops.

Casino gambling is being given fresh impetus by the opening of new casinos under the Gambling Act 2005, while bingo clubs are looking to a more positive future in which reduced duty rates give them an opportunity to invest in new facilities and formats.

However, over-the-counter betting faces intensifying competition from online sportsbooks, while mounting tax and regulatory pressure on B2 gaming machines could put the brake on further expansion in this key segment.

This report tracks British consumers' gambling habits in terms of what, where and how they play, identifies the barriers that exist to increased participation, and assesses ways in which land-based venues can respond to the themes, challenges and opportunities that are emerging.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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