

Betting Shops - UK - August 2009

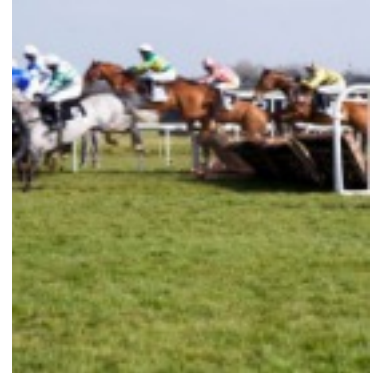
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What is this report about?

The UK gambling market has undergone far-reaching change over the near two years since the implementation of the Gambling Act in September 2007. All sectors of the industry now face a raft of new challenges and opportunities, and the betting shop market is no exception. With a shifting product and customer base, and facing new competition from online rivals, high-street bookmakers are embarking on a period of change, albeit one whose scale and nature is yet to become fully clear.

Key issues covered in the analysis

- An increase in bettors and other benefits accruing from the first full year of implementation of the new Gambling Act meant that net expenditure in betting shops was estimated to have passed the £4 billion mark in 2008.
- The cause and character of the last recession (1989-94) is very different to the current incarnation, so what are the prospects for betting shops in what is generally regarded as a recession-proof industry when consumer expenditure is being scaled back?
- Alongside legislation, internally, several developments have enabled betting shops to increase revenues, but does this extend to those outside of the major three operators?
- Rather than view themselves as competing with the booming online market, betting shops are seeking to embrace this delivery method by enhancing the multi-platform approach, but will that be enough to widen the consumer base and increase spend per head over the counter?
- Horseracing commands an ever-shrinking proportion of the business in value terms, with the likes of football and FOBTs emerging as the major growth areas. That should not detract from its importance given that 80% of those to bet in shops have placed a bet on the horses.
- Overall, consumer perceptions of betting shops are rooted in the dark and dank days of the 1970s despite the great leaps forward made by the retailers, so it behoves the operators to find a happy medium of satisfying its core customer base while at the same time attracting new entrants to the shops. Will existing policies do the trick or do new and inclusive innovations need to be introduced?



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Scope of the report

Mintel defines a betting shop as a licensed premises located in a public place to which adults (over-18s) can go to place a bet. It therefore excludes gambling in private clubs or other forms of gambling, such as lotteries, in which coupons/tickets are acquired in other non-licensed ways.