08/09/10/11

Industry statistics

April 2008 to March 2011

GAMBLING COMMISSION

Contents

Preface

1. These detailed statistics relating to the gambling industry in Great Britain have been collated by the Gambling Commission (the Commission) from regulatory returns required to be submitted by all licensed operators, other information provided by operators and information provided by trade bodies, regulatory partners and by a commercial provider.

2. This report provides statistics covering three 12 month periods:

   - 1 April 2008 – 31 March 2009
   - 1 April 2009 – 31 March 2010
   - 1 April 2010 – 31 March 2011.

   Some figures will be representative of the position at 31 March of the year concerned or reflect an average of values for dates falling within each 12 month period; whichever is the case is stated in the table.

3. All regulatory returns due for the periods 1 April 2008 – 31 March 2009 and 1 April 2009 – 31 March 2010 should have been submitted. Accordingly those figures are correct as of the date of publication, although may be subject to further minor change arising from overdue returns or identification of errors made in submissions. The figures provided for 1 April 2010 – 31 March 2011 are provisional, and therefore subject to amendment within future industry statistics publications, because:

   a) not all returns for the period are due to have been received
   b) in some instances, estimations have been necessary
   c) some returns are subject to outstanding queries with operators.

4. The Commission's methodology for providing annualised figures based on operators' returns is included in appendix 1.

5. The information contained in this document covers domestic British gambling markets (betting, bingo, casinos, arcades, gaming machines, lotteries) and remote gambling. It does not cover the National Lottery or spread betting, as those activities are not regulated by the Gambling Commission.

6. The terminology used in this document is explained in appendix 2.

7. Totals and percentages are calculated from unrounded figures.

8. Further statistics and information relating to the Commission and its activities are contained in the Commission's annual reports and licensing authority statistics publications, available on the Commission website at: **www.gamblingcommission.gov.uk**

Gambling industry data

Introduction

Market size

During the period April 2010 to March 2011 the British gambling industry, as regulated by the Commission, generated a gross gambling yield (GGY – see appendix 2) of £5.5 billion. This reflects only a marginal change compared to the same period the previous year.

The non-remote betting sector represents the largest market within the industry with a 53% share, followed by the casino sector (14%) and the British regulated remote sector (12%). However, most British consumer remote gambling activity is on overseas regulated sites. As an example, estimates put the UK consumer market at £1.9 billion for 2010, approximately three times the size of the British regulated remote market.[1]

Fig 1: Market share by GGY April 2010 to March 2011

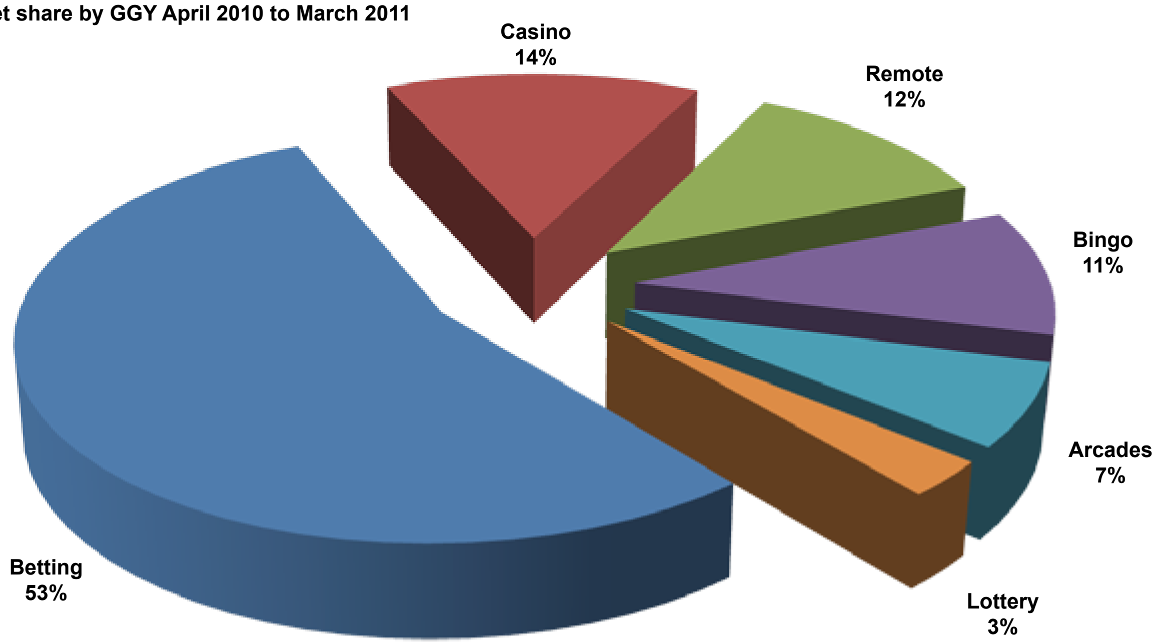


Table 1: GGY comparisons across all gambling sectors

Sector	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Non-remote sector	4,879.30	4,656.22	4,718.10	1%
Arcades	480.35	456.20	387.01	-15%
Betting	2,902.61	2,807.84	2,944.83	5%
Bingo	703.12	634.16	583.12	-8%
Casinos	793.22	758.02	803.15	6%
Remote betting, bingo and casino gambling[2]	816.86	631.51	660.74	5%
Lotteries (remote and non-remote)	143.69	156.39	167.72	7%
Total	**5,839.85**	**5,444.11**	**5,546.56**	**2%**

1 The Northern Ireland consumer market represents a small proportion of the UK total.
2 As regulated by the Commission.

Table 2: Gaming machine numbers across all gambling sectors

Machine category	Average number of machines			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B1	2,477	2,441	2,477	1%
B2	31,484	31,968	32,007	0%
B3	12,702	12,706	11,556	-9%
B4	612	478	430	-10%
C	60,580	52,399	45,476	-13%
D	49,215	46,722	42,894	-8%
Grand total	**157,070**	**146,714**	**134,840**	**-8%**

As the Commission does not license pubs, clubs, working men's clubs or FECs operating under a local authority permit, we do not collect regulatory returns for those businesses. The table does not, therefore, represent activity in those sectors.

Table 3: Gaming machine GGY across all gambling sectors

Machine category	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
B1	103.09	114.80	116.98	2%
B2	1,051.46	1,171.53	1,296.70	11%
B3	135.49	148.37	152.27	3%
B4	2.93	2.85	2.48	-13%
C	164.48	157.93	152.53	-3%
D	92.20	83.90	88.24	5%
Totals only*	329.19	285.54	195.52	-32%
Grand total	**1,878.84**	**1,964.92**	**2,004.73**	**2%**

* Where GGY figures have been provided but not broken down by machine category.

As the Commission does not license pubs, clubs, working men's clubs or FECs operating under a local authority permit, we do not collect regulatory returns for those businesses. The table does not, therefore, represent activity in those sectors.

Table 4: Number of employees across all gambling sectors*

Sector	Head count			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Betting	60,247	55,496	54,311	-2%
Bingo	15,917	15,443	14,952	-3%
Casino	13,321	13,619	13,598	0%
Arcades	16,499	16,254	13,836	-15%
GM Manufacturer	1,662	2,005	1,800	-10%
GM Supplier	8,205	6,673	6,159	-8%
Lotteries (ELM)	564	603	630	4%
Remote (FTE only)	8,918	7,216	6,077	-16%
Total	**125,333**	**117,309**	**111,363**	**-5%**

*Includes full-time and part-time posts.

Gambling participation and problem gambling prevalence

Participation in gambling activities (British Gambling Prevalence Survey 2010)
The British Gambling Prevalence Survey 2010 (BGPS), carried out by NatCen on behalf of the Commission, sampled 7,756 adults between November 2009 and June 2010. The report was published in February 2011. It showed that 73% of the adult population (about 35.5 million adults) had participated in some form of gambling activity within the past year. Excluding people who had only gambled on the National Lottery in the past year, 56% of the population had participated in another form of gambling in the past year.

The most popular gambling activities in Britain in 2010 were the National Lottery (59% had participated in the past year), other lotteries (25%), scratchcards (24%), betting on horse races (16%), playing slot machines (13%) and private betting (11%). Less than one in ten adults took part in each other activity. In the past year 4% of adults had bet online, a greater proportion of adults (13%) had used the internet to participate in other online gambling (ie the National Lottery and its related products, other lotteries, bingo, football pools, casino style games or online slot machine style games).

Table 5: Gambling activities in the past year (British Gambling Prevalence Survey 2010)

Type of gambling activity	Percentage of respondents (%)
National Lottery Draw	59
Another lottery	25
Scratchcards	24
Football pools	4
Bingo[3]	9
Slot machines	13
Fixed odds betting terminals[4]	4
Horse races[5]	16
Dog races[5]	4
Sports betting[5]	9
Betting on non-sports events[5]	4
Casino games[6]	5
Poker at a pub/club	2
Online slot machine style games/instant wins	3
Spread betting	1
Private betting	11
Any online betting[7]	4
Any other online gambling[8]	13
Any gambling activity	**73**

Participation in gambling activities (omnibus survey results)

The Commission has been using a quota sample omnibus survey to provide information on participation in gambling for a number of years. We currently commission two separate but complementary sets of questions in telephone omnibus surveys (conducted by ICM Research); one measuring participation in all types of gambling, and one which monitors participation solely in remote gambling.

3 Includes bingo played at a club or online (the prevalence of playing bingo online was less than 1%).
4 B2 gaming machines.
5 Includes bets made online, by telephone, or in person, with a bookmaker or a betting exchange.
6 Includes casino games (such as roulette, poker, blackjack) played in a casino or online (prevalence rates of playing casino games online in the last year was 3% overall).
7 Includes online bets on horse races, dog races, other sports or non-sports events, with a bookmaker or betting exchange.
8 Includes using the internet to play the National Lottery, other lotteries, bingo, football pools, casino games, online slot machine style games.

The data is published each quarter, based on a rolling sample of interviews conducted over the previous year.

As the omnibus surveys ask whether respondents have gambled in the past four weeks, the results obtained are not directly comparable with those of the BGPS 2007 or BGPS 2010 which look at respondents' gambling activity over the past week and past year.

Participation in all gambling activities

- In the year to March 2011[9], 56.2% of the 5,000[10] adults surveyed said they had participated in at least one form of gambling in the previous four weeks.
- This figure of 56.2% compares with the 2010 calendar year figure of 55.5%, and the 2009 calendar year figure[11] of 55.2%.

Table 6: Proportion of respondents participating in at least one form of gambling (survey data on gambling participation)

Gambling participation	2009	2010	Year to March 2011
All respondents	55.2%	55.5%	56.2%

- In the year to March 2011, the most popular gambling activity was National Lottery tickets (46.0% of respondents), followed by tickets for society or other good cause lotteries (11.4%) and National Lottery scratchcards (10.3%).
- Betting on horse races, the football pools, and fruit or slot machines were the next most popular activities (4.0%, 3.1% and 3.0% respectively).

Table 7: Proportion of respondents gambling by type of gambling activity (selected activities) (survey data on gambling participation)

Gambling activity (selected)	2009	2010	Year to March 2011
National Lottery tickets	45.7%	45.5%	46.0%
National Lottery products only (not participating in any other gambling activity)	31.3%	31.4%	32.1%
Tickets for society or other good cause lotteries	10.9%	12.2%	11.4%
National Lottery scratchcards	10.8%	10.2%	10.3%
Betting on horse races or virtual horse races with a bookmaker (does not include online)	3.4%	3.7%	4.0%
The football pools	3.1%	2.8%	3.1%
Fruit or slot machines	3.3%	2.8%	3.0%

Participation in remote gambling

- In the year to March 2011, 11.2% of the 5,000[10] adults surveyed said they had participated in at least one form of remote gambling in the previous four weeks. Around half of these had participated only in National Lottery products.
- This figure of 11.2% compares with the 2010 calendar year figure of 11.1%, the 2009 calendar year figure of 10.5%, the 2008 calendar year figure of 9.7%, the 2007 calendar year figure of 8.8% and the 2006 calendar year figure of 7.2%.

9 As the omnibus survey results are published quarterly, more up-to-date information is available on our website at www.gamblingcommission.gov.uk.
10 From September 2010, each set of questions are asked of 1,000 (and not 2,000) respondents per quarter.
11 Questions measuring participation in all gambling activities were first introduced in 2009 (following initial trials in 2008), therefore the earliest available complete calendar year for this dataset is 2009.

Table 8: Proportion of respondents participating in at least one form of remote gambling (survey data on gambling participation)

Gambling participation	2006	2007	2008	2009	2010	Year to March 2011
All respondents	7.2%	8.8%	9.7%	10.5%	11.1%	11.2%

- The growth in participation in remote gambling between 2006 and 2011 is explained very largely by increased online participation in the National Lottery. If those only playing National Lottery products remotely are excluded, 5.9% of respondents had participated in remote gambling in the year to March 2011, compared with 5.7% in 2010, 5.7% in 2009, 5.6% in 2008, 5.2% in 2007 and 5.1% in 2006.

Table 9: Proportion of respondents participating in remote gambling in the past four weeks, excluding those only playing National Lottery products (survey data on gambling participation)

All methods of remote gambling	2006	2007	2008	2009	2010	Year to March 2011
Those participating in at least one form of remote gambling (excluding those only playing National Lottery products) as a percentage of all respondents	5.1%	5.2%	5.6%	5.7%	5.7%	5.9%

- Overall, in the year to March 2011, 8.6% of respondents said they had remotely purchased tickets for the National Lottery draw in the previous four weeks (either exclusively or in addition to other types of gambling activity).
- Remote gambling via a computer, laptop or handheld device was most popular (9.8% of all respondents), followed by gambling via mobile phone (3.1%) and interactive/digital TV (1.4%).

Table 10: Proportion of respondents gambling using different remote methods in the past four weeks (survey data on gambling participation)

Methods of remote gambling	2006	2007	2008	2009	2010	Year to March 2011
Internet through a PC, laptop or handheld device	5.2%	6.9%	7.8%	9.1%	9.9%	9.8%
WAP/internet or text (SMS) on a mobile phone	2.2%	2.5%	2.9%	2.8%	2.9%	3.1%
Interactive/digital TV	1.7%	1.8%	2.1%	1.9%	1.4%	1.4%

Problem gambling

The BGPS 2010 measured the levels of problem gambling in the adult population in Great Britain using two internationally recognised scales, the Diagnostic and Statistical Manual of Mental Disorders 4th edition (DSM IV), and the Canadian Problem Gambling Severity Index (PGSI). This allowed us to check for reliability within our survey and to compare our findings with those found in similar studies around the world.

The DSM IV screen found that the rate of problem gambling in the adult population was 0.9%[12] which equates to about 451,000 adults. This figure was higher than that reported in 2007 and 1999 (0.6% for both years). This increase is at the margins of statistical significance. The PGSI screen identified 0.7%[13] of the adult population with a gambling problem, or around 360,000 adults. This does not constitute a statistically significant increase on the BGPS 2007 figure.

12 Confidence interval 0.7%-1.2%

13 Confidence interval 0.5%-1.0%

Betting

Structure of the non-remote betting industry

The non-remote betting industry is made up of both on-course and off-course betting operators. As at 31 March 2011, there were 531 licences held by operators for the activity non-remote general betting standard (off-course) and 670 for the activity non-remote general betting limited (on-course).

During 2010/11 the betting industry was heavily concentrated amongst five operators that, as at 31 March 2011[14], accounted for 83% of all betting shops. The numbers of betting shops in Great Britain operated by each of these operators is as follows:

Table 11: Number of premises by operator

Organisation	Total betting shops		
	As at 31 Mar 2009	As at 31 Mar 2010	As at 31 Mar 2011
William Hill	2,228	2,263	2,350
Ladbrokes	2,080	2,073	2,097
Gala Coral Group	1,630	1,645	1,712
Betfred	808	829	840
Tote[15]	516	512	514
Other	1,600	Approx 1,500	1,554*
Total	**8,862**	**Approx 8,822**	**9,067**

* During 2010/11 the Commission requested gambling premises data from all licensing authorities in Great Britain in order to update its location database. All but 14 licensing authorities responded and this information is used here where previously the Commission has published only estimates. All other figures are obtained directly from operators.

General information about the betting industry

The gross gambling yield generated by the British non-remote betting sector increased by 5% during 2010/11 compared to the previous 12 months. This was driven largely by a 10% increase in revenue from gaming machines. At the same time GGY reduced for on-course betting, as did the total number of betting sector employees (-2%).

Employees

Table 12: Betting sector employees

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Average number of employees	60,247	55,496	54,311	-2%

14 Figures for the major five bookmakers were obtained from the companies concerned.
15 The Tote has now been purchased by Betfred.

Off-course betting

Table 13: Off-course betting turnover

Type	Turnover			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Dogs	1,580.50	1,404.40	1,356.86	-3%
Football	941.73	956.17	1,025.87	7%
Horses	5,743.51	5,435.20	5,149.66	-5%
Numbers	870.79	854.00	834.47	-2%
Other	778.40	619.18	530.34	-14%
Total	**9,914.92**	**9,268.94**	**8,897.20**	**-4%**

Fig 2: Off-course betting turnover £m

Table 14: Off-course betting GGY

Type	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Dogs	303.95	279.69	259.76	-7%
Football	224.94	154.77	273.31	77%
Horses	843.79	767.13	705.20	-8%
Numbers	166.30	167.01	169.92	2%
Other	119.01	92.67	72.80	-21%
Total	**1,657.99**	**1,461.26**	**1,480.99**	**1%**

Fig 3: Off-course GGY £m

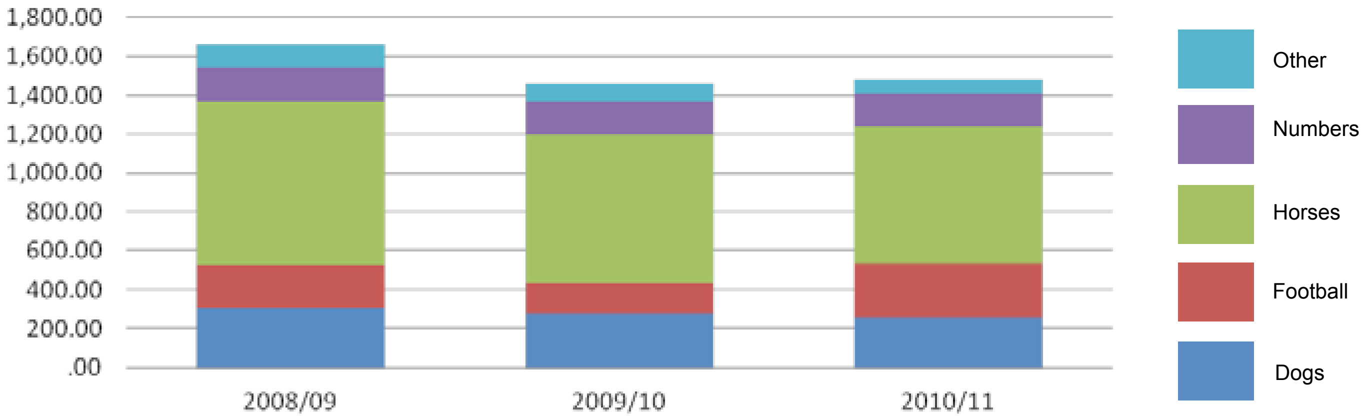


Table 15: On-course betting turnover

Type	Turnover			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Dogs	49.30	41.67	36.28	-13%
Horses	278.98	282.82	255.96	-9%
Other	7.77	12.46	15.79	27%
Total	**336.06**	**336.95**	**308.02**	**-9%**

Fig 4: On-course betting turnover £m

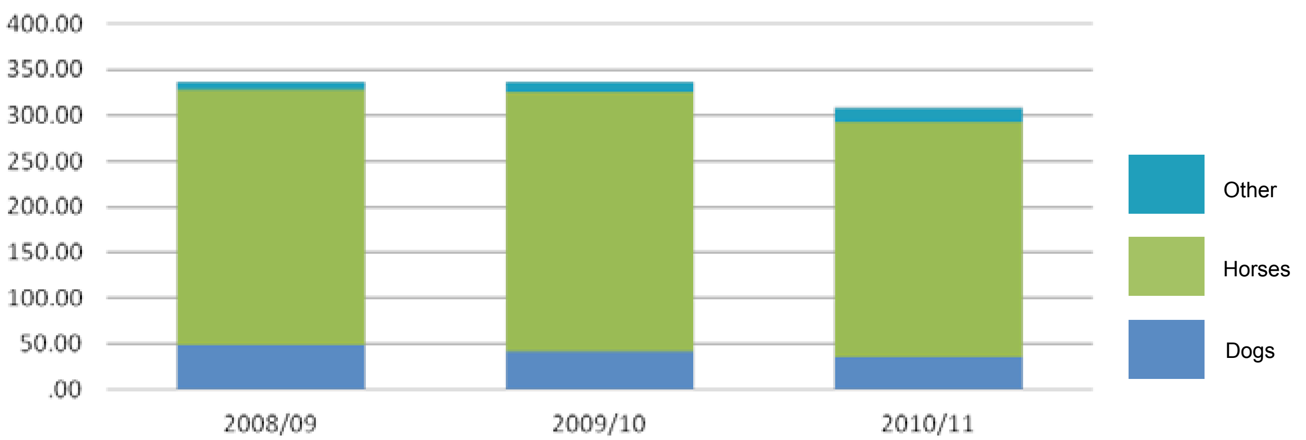


Table 16: On-course betting GGY

Type	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Dogs	3.85	3.55	2.98	-16%
Horses	23.17	23.62	20.36	-14%
Other	.74	1.85	1.93	4%
Total	**27.76**	**29.02**	**25.28**	**-13%**

Fig 5: On-course betting GGY £m

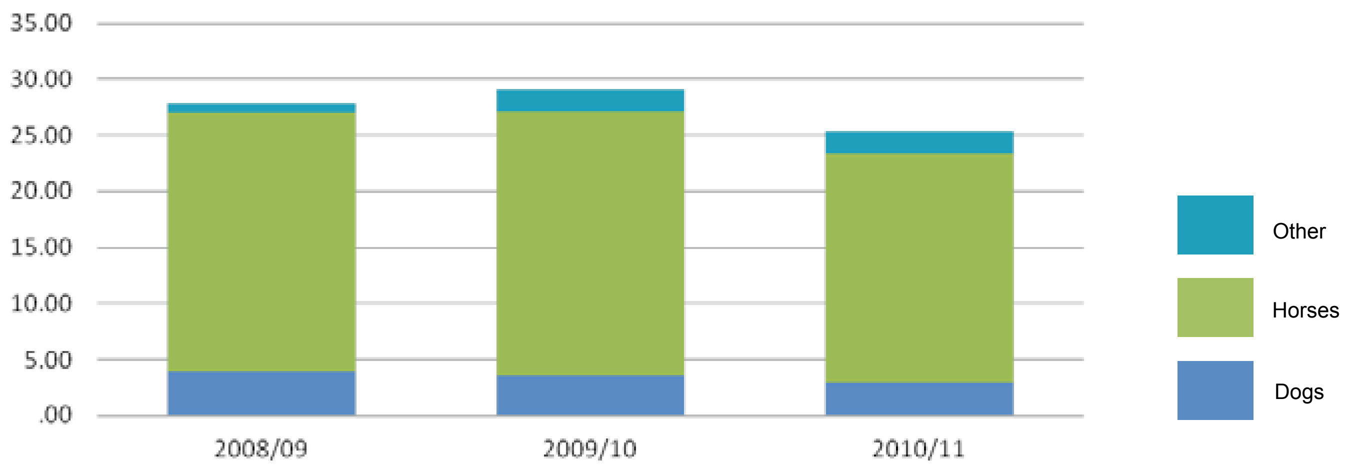


Table 17: Pool betting turnover

Type	Turnover			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Dogs	54.69	48.03	44.71	-7%
Football	59.21	56.09	50.85	-9%
Horses	377.80	356.39	393.56	10%
Other	1.66	1.71	1.28	-25%
Total	**493.36**	**462.22**	**490.39**	**6%**

Fig 6: Pool betting turnover £m

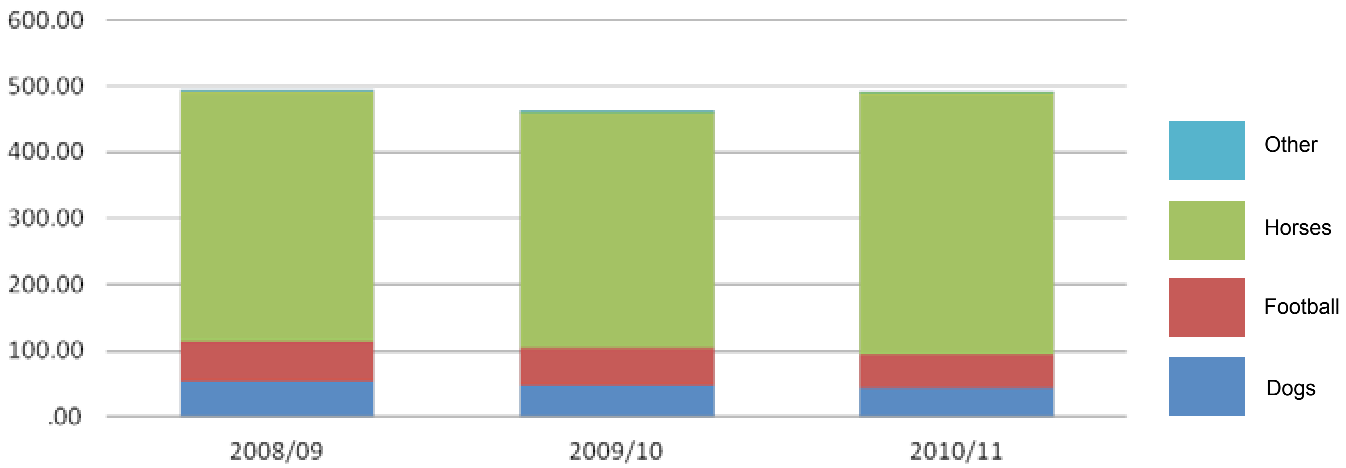


Table 18: Pool betting GGY

Type	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Dogs	14.66	13.62	12.65	-7%
Football	46.59	43.54	39.80	-9%
Horses	85.01	78.44	84.53	8%
Other	0.24	0.03	-0.06	-320%
Total	**146.50**	**135.62**	**136.91**	**1%**

Fig 7: Pool betting GGY £m

Gaming machines in betting shops

Table 19: Average gaming machine numbers[16]

Machine category	Average number of gaming machines and terminals			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B2	31,439	31,936	31,978	0%
B3	220	211	188	-11%
B4	25	10	3	-70%
C	320	183	163	-11%
D	18	13	8	-38%
Total	**32,022**	**32,353**	**32,340**	**0%**

Table 20: Gaming machine GGY[17]

Machine category	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
B2	1,050.71	1,170.57	1,295.44	11%
B3	2.46	3.76	2.48	-34%
B4	0.07	0.07	0.02	-63%
C	1.64	0.88	0.80	-9%
D	0.05	0.12	0.02	-87%
Aggregated categories*	15.43	6.54	2.90	-56%
Total	**1,070.36**	**1,181.94**	**1,301.66**	**10%**

* Where GGY figures have been provided but not broken down by machine category.

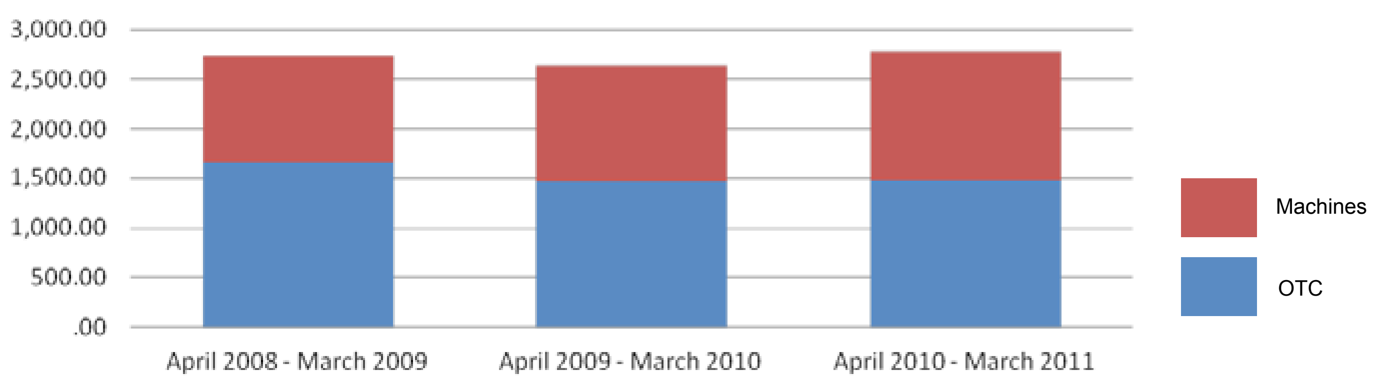
Table 21: Off-course betting sector breakdown of GGY

Type	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Over the counter (OTC)	1,657.99	1,461.26	1,480.99	1%
Machines	1,070.36	1,181.94	1,301.66	10%
Total	**2,728.35**	**2,643.20**	**2,782.64**	**5%**

16 If a single gaming machine offers games of different categories the machine is counted as the highest category of game offered. For example if a gaming machine offers B2 and B3 content for the purpose of regulatory returns it is counted as a B2 gaming machine.

17 Betting operators' gaming machines may include B2 and B3 content. In line with the previous footnote, where a machine offers games of different categories the GGY is currently attributed to the highest category of game available. For example, GGY generated by B3 gaming machine content on a terminal which also offers B2 content will be reported as B2 GGY.

Fig 8: Off-course betting sector breakdown of GGY £m



Self exclusions recorded by operators

Table 22: Betting sector self exclusions

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Self exclusions	11,424	16,342	20,823	27%
Known breaches of self exclusion	4,033	8,468	10,467	24%
Number of individuals who cancelled their self exclusion after minimum exclusion period	1,160	1,821	2,781	53%

The number of people who have self excluded and the number of people who have cancelled their self exclusion may be lower than these figures as individuals may have self excluded from more than one venue or operator and thus been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals.

Gambling where individuals were unable to prove their age

Table 23: Betting sector underage challenges

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Challenged upon entry but unable to prove age	87,727	525,140	564,517	7%
Challenged when attempting to gamble but unable to prove age	22,008	71,050	90,453	27%

Integrity in betting

210 cases of suspicious betting activity have been reported to the Commission between 1 September 2007 and 30 September 2011 (including 17 reports between 1 April 2011 and 30 September 2011).

125 of the 210 cases were reported by betting operators under licence condition 15.1 in the first instance with 85 coming from sports governing bodies, or other sources such as the media, the public or non-regulated operators.

135 cases have been closed. In 133 of those cases, the grounds for suspicion of criminal activity have not been substantiated and the Commission either closed the cases or passed them to the relevant sport's governing body with any action taken by the sport's governing body now completed. Of the remaining two, only one investigation resulted in criminal proceedings - **a caution for cheating at gambling**. The other led to the **perpetrators losing their jobs and bets being voided.**

A breakdown of the activities involved in those 135 cases is provided below. Of the remainder, as at 30 September 2011, 29 cases are still at the preliminary assessment stage, 32 cases have been passed to the relevant sport's governing body for investigation and there are 14 active investigations in which the Commission is involved.

Table 24: Suspicious betting activity (1 September 2007 to 30 September 2011)[18]

Activity	Total cases closed to 31 Mar 2010	Cases closed 1 Apr 2010 to 30 Sept 2010	Cases closed 1 Oct 2010 to 31 Mar 2011	Cases closed 1 Apr 2011 to 30 Sept 2011	Total cases closed to 30 Sept 2011
Bowls	1	0	0	0	1
Boxing	1	0	2	0	3
Cricket	1	0	2	2	5
Darts	2	0	0	0	2
Football	17	8	11	4	40
Golf	1	0	0	0	1
Greyhounds	5	1	1	1	8
Horseracing	11	2	8	11	32
Multi	0	0	0	1	1
Non-sport	3	1	0	0	4
Rugby league	2	1	0	1	4
Snooker	8	1	2	0	11
Specials - other	0	0	0	1	1
Specials - TV/Awards	0	0	1	2	3
Squash	0	0	1	0	1
Tennis	14	1	1	1	17
Unknown	0	1	0	0	1
	66	**16**	**29**	**24**	**135**

18 Closed cases may subsequently be re-opened or merged with other cases as new information comes to light. Accordingly numbers (including closed cases) may vary between publications.

Bingo

Structure of the non-remote bingo industry

As at 31 March 2011 there were 245 operators holding non-remote bingo licences. The sector is broken down as follows:

Table 25: Number of premises by operator

Organisation	Total premises at 31 Mar 2011
Gala Coral Group	267
Rank Group - Mecca Bingo Ltd	103
Top Ten Bingo	24
Cashino Gaming Limited	18
Park Holidays UK Limited	15
Carlton Clubs plc	14
Thomas Estates Limited	12
Independent/small operators	242*
Total	**695**

*During 2010/11 the Commission requested gambling premises data from all licensing authorities in Great Britain in order to update its location database. All but 14 licensing authorities responded with updates and this information is used here where previously the Commission has published only estimates.

The figures shown in table 25 for 31 March 2011 represent the number of premises licences issued and, in contrast to previous industry statistics figures, include split premises counted separately. This accounts for an increase in the number of bingo premises figures reported for some operators.

Although only a single licence type, the bingo industry is made up of various types of businesses including large bingo clubs, holiday parks, working men's clubs and smaller high street venues. In this publication these venues are only included where they hold a premises licence. In recent publications the Commission has broken down premises into categories, such as converted AGCs or holiday parks, by consulting Industry stakeholders. However, as the Commission does not collect data on this type of distinction, and as smaller high street venues become more common (through conversions or new premises) such distinctions become less clear, it has been decided to discontinue such a categorisation of premises within this publication.

General information about the bingo industry

Bingo GGY, bingo turnover and the number of bingo employees have all reduced during 2010/11 compared to the previous year.

Employees

Table 26: Bingo sector employees

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Number of employees	15,917	15,443	14,952	-3%

Bingo turnover

Table 27: Bingo turnover

Game type	Bingo turnover			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Main stage bingo	769.65	701.83	654.32	-7%
Mechanised cash bingo	557.93	567.88	559.79	-1%
Prize bingo	106.92	53.60	33.68	-37%
Total	**1,434.50**	**1,323.31**	**1,247.79**	**-6%**

Fig 9: Bingo turnover £m

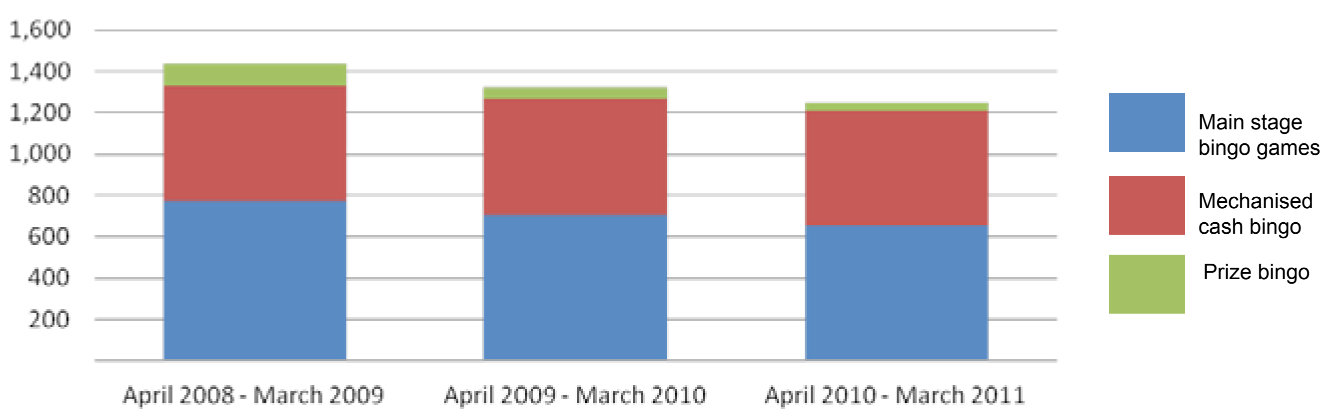
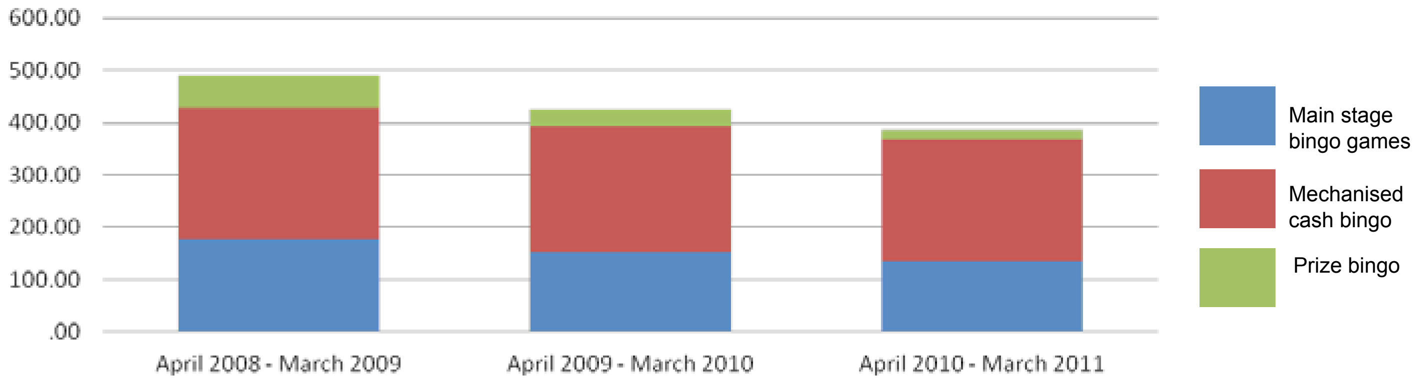


Table 28: Bingo GGY (participation fees)

Game type	Bingo gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Main stage bingo	175.97	151.55	136.08	-10%
Mechanised cash bingo	251.80	241.50	231.20	-4%
Prize bingo	61.81	31.67	18.38	-42%
Total	**489.58**	**424.72**	**385.66**	**-9%**

Fig 10: Bingo GGY £m



Gaming machines in bingo clubs

Table 29: Average gaming machine numbers

Machine category	Average number of gaming machines and terminals			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B3	2,458	3,132	3,175	1%
B4	394	303	241	-20%
C	14,395	12,894	12,545	-3%
D	1,965	1,667	2,082	25%
Total	**19,212**	**17,996**	**18,043**	**0%**

Table 30: Gaming machine GGY

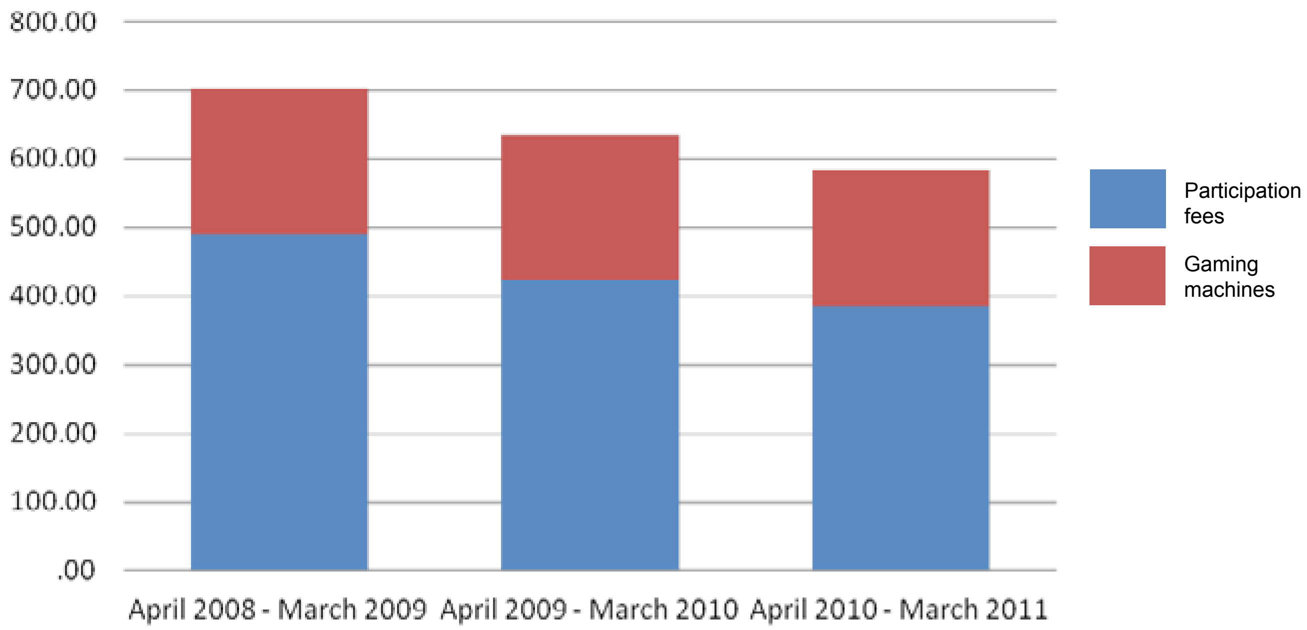
Machine category	Gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
B3	39.69	48.76	48.18	-1%
B4	2.10	2.22	1.93	-13%
C	58.10	59.29	57.58	-3%
D	0.98	2.06	3.24	57%
Aggregated categories*	112.66	97.10	86.54	-11%
Total	**213.54**	**209.43**	**197.46**	**-6%**

* Where GGY figures have been provided but not broken down by machine category.

Table 31: Bingo sector breakdown of GGY

Revenue stream	Bingo gross gambling yield			
	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Participation fee	489.58	424.72	385.66	-9%
Gaming machines	213.54	209.43	197.46	-6%
Total	**703.12**	**634.16**	**583.12**	**-8%**

Fig 11: Bingo sector breakdown of GGY



Self exclusions recorded by operators

Table 32: Bingo sector self exclusions

	Self exclusions			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Self exclusions	347	468	605	29%
Known breaches of self exclusion	36	28	19	-32%
Number of individuals who cancelled their self exclusion after minimum exclusion period	102	141	138	-2%

The number of people who have self excluded and the number of people who have cancelled their self-exclusion may be lower than these figures as individuals may have self excluded from more than one venue or operator and thus been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals.

Gambling where individuals were unable to prove their age

Table 33: Bingo sector age challenges

	Underage challenges			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Challenged upon entry but unable to prove age[19]	158	176	253	44%
Challenged when attempting to gamble but unable to prove age[20]	9	29	51	76%

19 Under 18s are allowed in licensed commercial bingo clubs but they must not take part in playing bingo or any other forms of gambling whilst on the premises. If a bingo club has category B or C gaming machines these must be separated from areas where under 18s are allowed. Although the law does not prevent under 18s from entering bingo clubs, the industry generally chooses to apply a no under 18s policy.

20 It is illegal for anyone under the age of 18 to gamble on a bingo premises.

Casinos

Structure of the non-remote casino industry

There were 149 casinos operating at 31 March 2011. Three companies own the majority of casinos in the industry, namely Genting UK (Genting Casinos) with 46 casinos, the Rank Group (Grosvenor Casinos and 'G' Casinos) with 37 casinos and the Gala Coral Group (Gala Casinos) with 28 casinos.

As at 31 March 2011, seven 2005 Act casino operating licences were held by operators and four of the sixteen local authorities permitted to issue 2005 Act casino premises licences had begun their competition processes. A number of other local authorities are expected to follow suit in the coming months.

Table 34: Number of premises by operator

Organisation	Total casinos		
	Total casinos at 31 Mar 2009	Total casinos at 31 Mar 2010	Total casinos at 31 March 2011
Rank Group (Grosvenor and 'G' Casinos)	32	35	37
Genting UK (Genting Casinos)	45	44	46
Gala Coral Group (Gala Casinos)	27	27	28
London Clubs International	11	10	11
Other operators	30	25	27
Total	**145**	**141**	**149**

General information about the casino industry

Employees

Table 35: Casino sector employees

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Number of employees	13,321	13,619	13,598	0%

Casino attendance

Table 36: Casino attendance

	Scotland	North	Midlands & Wales	South	Other London	London high end*	Total
	Customers (millions)						
Apr 2009 - Mar 2010	1.70	4.85	3.93	2.90	3.58	0.15	**17.10**
Apr 2010 - Mar 2011	1.84	4.87	4.01	2.96	3.55	0.16	**17.38**

Table 37: Average industry table numbers

Game	Tables			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
3 Card Poker	250	235	224	-5%
American Roulette	867	826	804	-3%
Blackjack	597	577	556	-4%
Casino Stud Poker	66	36	21	-42%
Dice	13	17	20	18%
Electronic Roulette (player positions)	3,958	3,675	3,604	-2%
Punto Banco	98	111	102	-8%
Other*	188	277	357	29%
Total	**6,037**	**5,754**	**5,688**	**-1%**

* includes new games, less common games, and player positions at electronic multigames terminals.

Table 38: Casino drop[21] and win by region

Region	Casinos operating	Year	Drop £m	% change from previous year	House win £m	% change from previous year	House win %
Scotland	15	April to March 2010/11	206.51	-3%	31.62	-4%	15%
	15	April to March 2009/10	212.09	0%	33.00	-3%	16%
	14	April to March 2008/09	211.79	5%	34.09	5%	16%
North	41	April to March 2010/11	674.90	3%	99.34	3%	15%
	38	April to March 2009/10	654.34	-2%	96.73	1%	15%
	38	April to March 2008/09	668.77	0%	95.71	-6%	14%
Midlands and Wales	39	April to March 2010/11	577.10	1%	84.88	3%	15%
	38	April to March 2009/10	570.00	-3%	82.81	-2%	15%
	38	April to March 2008/09	588.14	-1%	84.13	-4%	14%
South	29	April to March 2010/11	390.43	-2%	61.28	0%	16%
	27	April to March 2009/10	400.25	-4%	61.38	-7%	15%
	28	April to March 2008/09	415.28	-11%	66.11	-11%	16%
High end London*	6	April to March 2010/11	1,465.54	48%	169.23	32%	12%
	6	April to March 2009/10	987.15	-1%	128.35	-15%	13%
	6	April to March 2008/09	1,000.03	16%	151.36	36%	15%
Other London	17	April to March 2010/11	1,675.00	7%	238.19	0%	14%
	17	April to March 2009/10	1,567.28	-5%	238.40	-4%	15%
	19	April to March 2008/09	1,645.22	1%	247.21	-1%	15%
Great Britain total	**147****	**April to March 2010/11**	**4,988.48**	**14%**	**684.54**	**7%**	**14%**
	141**	**April to March 2009/10**	**4,391.11**	**-3%**	**640.67**	**-6%**	**15%**
	143**	**April to March 2008/09**	**4,529.23**	**2%**	**678.62**	**3%**	**15%**

* Six casinos identified by the National Casino Industry Forum (NCIF) - Crockfords, Aspinalls, Clermont Club, The Ritz, Les Ambassadeurs, Maxims Casino.

** The number of casinos that provide table games and therefore supply us with drop and win figures, ie those casinos that do not offer table games (card clubs) do not provide these returns.

21 Drop = money exchanged for gaming chips. Win/house win = amount retained by the casino.

Table 39: Total drop by game[22]

	American Roulette £m	Blackjack £m	Trial and other Games £m	Casino Stud Poker £m	Dice £m	Punto Banco £m	Three Card Poker £m	Elec-tronic Roulette £m	Elec-tronic Multi-game £m	Total £m
Apr 2010-Mar 2011	2,412.18	739.55	24.60	5.80	18.63	628.07	181.30	725.38	108.17	4,843.67
Apr 2009-Mar 2010	2,140.05	713.23	23.71	8.70	13.17	426.14	189.86	743.80	6.07	4,264.73

Gaming machines in casinos

Table 40: Average gaming machine numbers

Machine category	Number of machines and terminals			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B1	2,477	2,441	2,477	1%
B2	45	32	29	-9%
B3	5	5	4	-20%
Total	**2,527**	**2,478**	**2,510**	**1%**

Table 41: Gaming machine GGY

Machine category	Gross gambling yield			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B1	103.09	114.80	116.98	2%
B2	0.75	0.97	1.26	31%
B3	0.05	0.09	0.07	-17%
Aggregated categories*	10.71	1.50	0.29	-81%
Total	**114.60**	**117.35**	**118.61**	**1%**

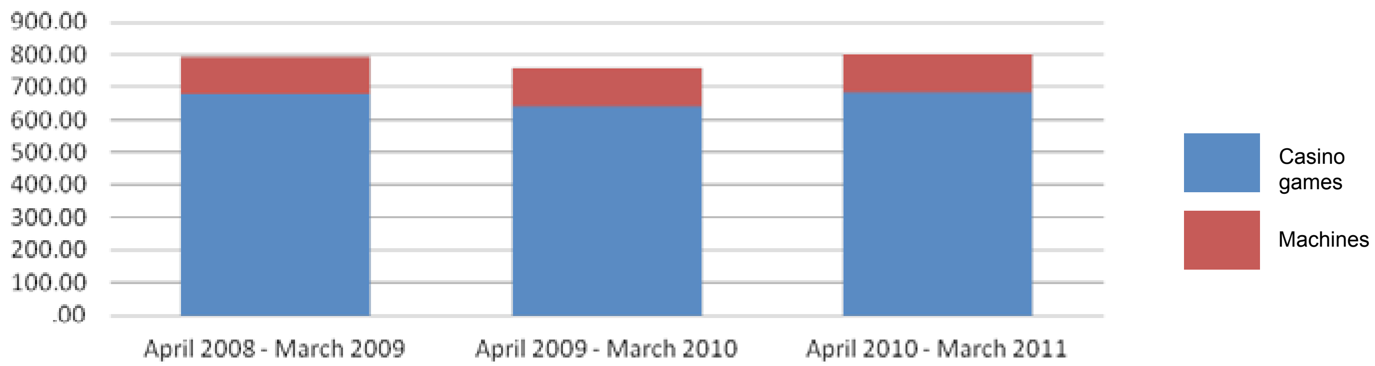
* Where GGY figures have been provided but not broken down by machine category.

Table 42: Total casino GGY

Machine category	Gross gambling yield			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Casino games	678.62	640.67	684.54	7%
Machines	114.60	117.35	118.61	1%
Total	**793.22**	**758.02**	**803.15**	**6%**

22 The totals in table 39 are lower than those in table 38 because of 'false' drop, which is drop exchanged for plaques at the cash desk and converted into chips at the table but not then used. This is only recorded for major players and the value is included in the total drop but is not attributable to any game.

Fig 12: GGY casinos £m



Location of casinos

Table 43: 1968 Act casino permitted areas – premises operating under a non-remote casino licence

Licensing Area	at 31 Mar 2010	at 31 Mar 2011	Licensing area	at 31 Mar 2010	at 31 Mar 2011	Licensing Area	at 31 Mar 2010	at 31 Mar 2011
England			**England**			**England**		
Birkenhead	1	1	Luton	3	3	Stoke-on-Trent	2	2
Birmingham	7	7	Manchester	6	6	Sunderland	1	1
Blackpool	2	2	Margate	1	1	Teesside	1	1
Bolton	2	2	Newcastle-upon-Tyne	3	3	Torbay (Torquay)	1	1
Bournemouth	2	2	Northampton	3	3	Walsall	1	2
Bradford	2	2	Nottingham	5	5	West Bromwich	1	1
Brighton	3	3	Plymouth	2	2	Wolverhampton	2	2
Bristol	3	4	Portsmouth & Southsea	2	3			
Coventry	3	3	Ramsgate	1	1	**London**	**23**	**25**
Derby	2	2	Reading	2	3			
Dudley	1	1	Ryde	0	0	**Wales**		
Great Yarmouth	3	3	Salford	2	2	Cardiff	3	3
Hove	1	0	Scarborough	1	2	Swansea	2	2
Huddersfield	1	2	Sheffield	3	3			
Kingston-upon-Hull	2	2	Southampton	3	3	**Scotland**		
Leeds	5	5	Southend-on-sea	3	3	Aberdeen	4	3
Leicester	3	3	Southport	1	1	Dundee	2	2
Liverpool	3	4	Stockport	2	2	Edinburgh	4	4
						Glasgow	5	6
Total number of operating casinos							**141**	**149***

* This includes two premises that do not offer table games.

2005 Act casinos

Under Section 175(4) of the Gambling Act 2005, 16 local council (licensing authority) areas were determined as potential locations for casinos, as follows: One large casino can be permitted to be licensed in Great Yarmouth, Kingston-upon-Hull, Leeds, Middlesbrough, Milton Keynes, Newham, Solihull and Southampton.
One small casino can be permitted to be licensed in Bath and North East Somerset, Dumfries and Galloway, East Lindsey, Luton, Scarborough, Swansea, Torbay and Wolverhampton.

As at 31 March 2011 no small or large casinos had opened (although the large casino in Newham subsequently opened in December 2011).

1968 Act casinos - licences not operational as at 31 March 2011

At 31 March 2011, there could have been a theoretical maximum of 186 1968 Act casinos, comprising 149 casinos operating, 13 casinos licensed but subsequently closed, 27 casinos licensed but not yet operating, but minus three replacement licences. Three casinos which specialise in card room activities are included in the total.

1968 Act casino permitted areas

Areas in which the licensing of premises for casino gaming under the 1968 Act is permitted showing the number of licensed casinos operating on 31 March 2010 and 31 March 2011 are given below. New licences for 1968 Act casinos are no longer issued.

Self exclusions recorded by operators

Table 44: Casino sector self exclusions

	Self exclusions			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Self exclusions	6,081	6,243	6,684	7%
Known breaches of self exclusion	383	595	636	7%
Number of individuals who cancelled their self exclusion after minimum exclusion period	868	1,331	1,456	9%

The number of people who have self excluded and the number of people who have cancelled their self-exclusion may be lower than these figures as individuals may have self excluded from more than one venue or operator and thus been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals.

Gambling where individuals were unable to prove their age

Table 45: Casino sector age challenges

	Underage challenges			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Challenged upon entry but unable to prove age	41	80	91	14%
Challenged when attempting to gamble but unable to prove age	9	31	28	-10%

Gaming machines, including arcades

Structure of the gaming machine and arcade industry

There were 570 Adult Gaming Centre (AGC) licences and 235 Family Entertainment Centre (FEC) licences held by operators as at 31 March 2011. There were 69 licences to manufacture gaming machines or gaming machine software and 543 gaming machine supplier licences held under either the Gambling Act 2005 or Section 27 of the 1968 Act.

Table 46: Number of arcade premises

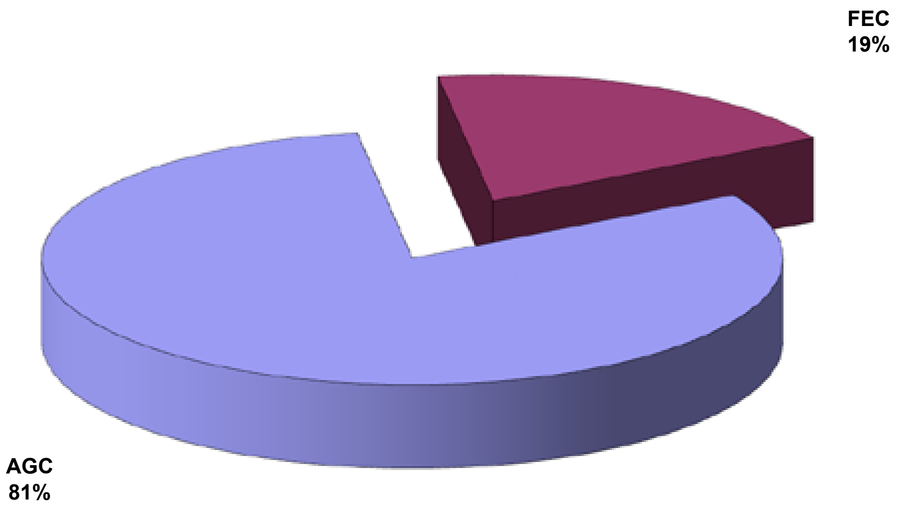
Arcade type	Number of premises as at 31 March 2011*
Adult Gaming Centre (AGC)	2,103
Family Entertainment Centre (FEC)[23]	293

* During 2010/11 the Commission requested gambling premises data from all licensing authorities in Great Britain in order to update its location database. All but 14 licensing authorities responded with updates and this information is used here where previously the Commission has published only estimates. These figures may include split premises.

Table 47: Number of licences - gaming machine manufacturers, suppliers, AGCs and FECs

		at 31 Mar 2010	at 31 Mar 2011
1968 Act	Section 27 certificate holders[24]	252	119
2005 Act	Machine suppliers	317	424
	Sub total of above	**569**	**543**
	Machine manufacturers	73	69
	Adult Gaming Centre (AGC)	612	570
	Family Entertainment Centre (FEC)	274	235

Figure 13: Breakdown of the Commission-licensed arcade sector market share by GGY market share (2010/11)



Some manufacturers also supply machines (and may hold both licences). For the purpose of this section operators have been associated with the category (manufacturer or supplier) that best captures their business model.

23 Will only include those FECs licensed by the Gambling Commission, excludes those requiring only a permit from local licensing authorities.
24 Section 27 certificate holders must apply for an operating licence under the 2005 Act when their certificate expires.

Gaming machine manufacturers

The primary business of machine manufacturers is the design and manufacture of machines and new game concepts for machines in categories B – D, including cranes and pushers. Larger manufacturers are identified as those with the greatest GGY between 1 April 2010 and 31 March 2011:

- Astra Novomatic
- Barcrest[25]/IGT
- Bell Fruit (Danoptra)

Gaming machine suppliers

The primary business of machine suppliers is the supply and maintenance of gaming machines on behalf of the operator, usually on a rental basis. Larger suppliers are identified as those that supplied the greatest number of machines[26] to operators between 1 April 2010 and 31 March 2011:

- AMG Leisure Limited
- Claremont Automatics Ltd
- Crown Leisure Limited
- Dransfield Novelty Company Ltd
- Gamestec Leisure Limited
- Global draw
- Inspired Gaming (UK) Limited
- RLMS Sales Limited
- Sceptre Leisure Solutions Limited
- Wessex Coin Ltd

General information about the gaming machine and arcade industries

Number of employees

Table 48: Gaming machine sector employees

Licence type	Number of employees			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
AGC	12,693	13,032	11,198	-14%
FEC[27]	3,806	3,222	2,638	-18%
Gaming machine and software manufacturer	1,662	2,005	1,800	-10%
Gaming machine supplier	8,205	6,673	6,159	-8%
Total	**26,366**	**24,932**	**21,795**	**-13%**

25 Barcrest is now owned by Global Draw and is no longer linked to IGT.
26 Including dedicated/greened machines, terminals or games.
27 Will only include those FECs licensed by the Gambling Commission, excludes those requiring only a permit from local licensing authorities.

Gaming machines in AGCs and FECs

Table 49: Average AGC machine numbers

Machine category	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B3	10,018	9,359	8,189	-13%
B4	193	166	187	13%
C	42,373	36,367	30,006	-17%
D	19,709	19,220	17,267	-10%
Total	**72,293**	**65,112**	**55,649**	**-15%**

Table 50: AGC machine GGY

Machine category	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
B3	93.29	95.76	101.54	6%
B4	0.76	0.57	0.53	-8%
C	99.09	92.15	88.19	-4%
D	39.95	24.60	26.50	8%
Aggregated categories*	164.78	164.55	96.52	-41%
Total	**397.87**	**377.63**	**313.28**	**-17%**

* Where GGY figures have been provided but not broken down by machine category.

Table 51: Average licensed FEC machine numbers

Machine category	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
C	3,491	2,954	2,763	-6%
D	27,521	25,823	23,537	-9%
Total	**31,012**	**28,777**	**26,300**	**-9%**

Table 52: Licensed FEC GGY

Machine category	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
C	5.64	5.61	5.96	6%
D	51.23	57.12	58.49	2%
Aggregated categories*	25.61	15.85	9.27	-42%
Total	**82.48**	**78.57**	**73.72**	**-6%**

* Where GGY figures have been provided but not broken down by machine category.

Self exclusions recorded by operators

Table 53: Sector self exclusions

	Licence type	Self exclusions			
		Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Self exclusions	AGC	2,709	3,031	2,972	-2%
	FEC	206	215	211	-2%
Known breaches of self exclusion	AGC	675	832	802	-4%
	FEC	85	78	67	-14%
Number of individuals who cancelled their self exclusion after minimum exclusion period	AGC	133	146	86	-41%
	FEC	10	17	51	209%

The number of people who have self excluded and the number of people who have cancelled their self exclusion may be lower than these figures as individuals may have self excluded from more than one venue or operator and thus been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals.

Gambling where individuals were unable to prove their age

Table 54: Arcade sector age challenges

	Licence type	Self exclusions			
		Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Challenged upon entry but unable to prove age*	AGC	7,440	12,880	13,949	8%
Challenged when attempting to gamble but unable to prove age	AGC	530	716	569	-20%
	FEC (adult area)	239	240	90	-62%

*Children are allowed in FECs.

Lotteries

Lotteries

Structure of the lotteries industry

As at 31 March 2011, there were a total of 447 society lottery (SL) operators holding 621 lottery licences. Those licences comprised 443 non-remote lottery operating licences and 178 remote lottery operating licences. A society is defined as non-commercial if it is organised for charitable, sporting, cultural or other purposes apart from private or commercial gain.

Societies may employ a licensed external lottery manager (ELM) to promote all or part of their lottery on their behalf. As at 31 March 2011, there were 29 ELMs holding 40 licences. Those licences comprised 25 non-remote ELM operating licences and 15 remote ELM operating licences.

Table 55: Lottery licences

Licence	Type	at 31 Mar 2010	at 31 Mar 2011
Society lotteries	Non-remote	419	443
	Remote	96	178
ELMs	Non-remote	24	25
	Remote	10	15

General information about lotteries

The lottery sector has recorded growth year on year since 2008/09. During 2010/11 the total proceeds taken from society lotteries increased by 7% compared to the previous year whilst the proportion of lotteries managed by ELMs has also grown.

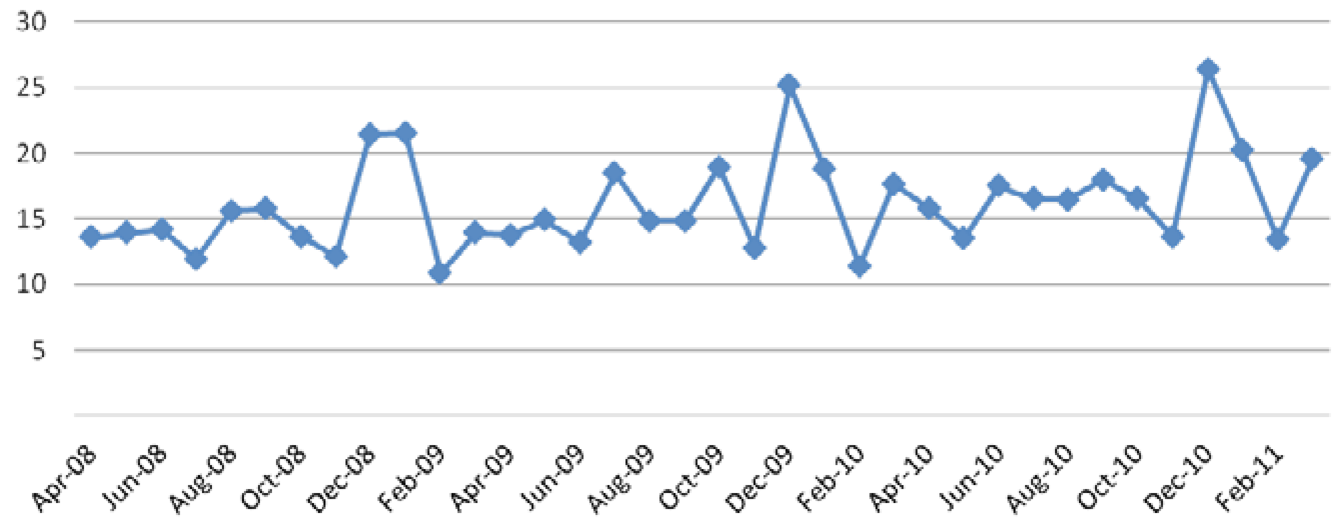
Society lotteries

Table 56: Total lottery proceeds, expenses and prizes (includes ELM managed lotteries)

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Prizes from proceeds*	34.97	38.37	40.00	4%
Expenses	49.54	57.96	66.34	14%
Balance (to good causes)	94.15	98.42	101.38	3%
Total proceeds	**178.66**	**194.76**	**207.73**	**7%**

*Excludes prizes from rollovers.

Fig 14: Monthly lottery proceeds £m



Society lotteries managed by external lottery managers

As an ELM operates on behalf of a society lottery, the proceeds from ELM lotteries presented below represent a subset of the total proceeds shown in table 56 (they are not additional proceeds).

Table 57: ELM managed lottery proceeds, expenses and prizes[28]

ELM managed lotteries	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Prizes from proceeds*	9.30	11.44	19.60	71%
Expenses	9.84	19.51	29.86	53%
Balance (to good causes)	16.91	23.96	33.38	39%
Total proceeds	**36.05**	**54.92**	**82.85**	**51%**

*Excludes prizes from rollovers.

Employees

Table 58: ELM employees

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Number of employees	564	603	630	4%

Gambling where individuals were unable to prove their age

There were no incidents recorded by ELMs or Society Lotteries when someone who attempted to gamble, or gambled, when challenged was unable to prove their age.

28 Does not include those ELM managed lotteries registered with local authorities

Remote betting, bingo and casino

Remote gambling industry

The estimates provided in tables 59 and 60 below are provided courtesy of H2 Gambling Capital (www.h2gc.com).

It is estimated that global remote gambling GGY (excluding telephone betting) was £18 billion during 2010, which represents 23% growth since 2008. UK consumer GGY (includes GGY generated with operators regulated overseas), which includes telephone betting, is also estimated to have grown 23% between 2008 and 2010 to reach £1.9 billion.

Table 59: The global remote industry (excludes telephone betting)[29]

	Jan 2008 - Dec 2008 £m	Jan 2009 - Dec 2009 £m	Jan 2010 - Dec 2010 £m	% change 2009 to 2010
GGY	14,880	16,670	18,270	10%

Table 60: The UK consumer remote industry

	Jan 2008 - Dec 2008 £m	Jan 2009 - Dec 2009 £m	Jan 2010 - Dec 2010 £m	% change 2009 to 2010
GGY	1,580	1,760	1,940	10%

Structure of the British licensed remote gambling industry

The remote gambling industry in Great Britain, which includes both UK and overseas consumer activity conducted in reliance on a Commission licence, is made up primarily as follows:

- some of the large and familiar high street bookmakers that offer remote gambling (for example, Gala Coral Group)
- large remote-only operators
- smaller betting operators that operate remote gambling facilities themselves
- smaller betting operators that have their remote operations hosted by third parties
- fantasy football style remote pool betting operators
- smaller remote-only bingo and casino operators that do not offer any premises based gambling
- businesses supplying gambling software to gambling operators.

As at 31 March 2011 there were 291 remote gambling activity licences held by 225 operators.

Table 61: Breakdown of remote gambling activities licensed by the Commission

Activity	at 31 Mar 2010	at 31 Mar 2011
Gambling software	105	84
General betting (real events)[30]	59	57
General betting (virtual events)[30]	10	13
Pool betting	53	48
General betting (telephone)	41	37
Casino	18	20
Betting intermediary (trading room only)[31]	13	15
Betting intermediary	11	9
Bingo	12	8
Total	**322**	**291**

29 Figures were originally provided in Euros: 2008 – €17.44 billion, 2009 - €19.53 billion, 2010 - €21.41 billion (1 EUR = 0.853282 GBP). This estimate excludes telephone betting, which is thought to be an additional €1.5 - €2 billion per annum.

30 This category of licence was introduced on 1 August 2009 and resulted in the previous licence activity being split between real and virtual events. Going forward, the Commission will be reporting these licence numbers separately rather than combined as in the 2009/10 industry statistics.

31 In the 2009/10 industry statistics betting intermediary (trading room only) and betting intermediary licence holders are reported as one figure. This and future industry statistics will report these licence activities separately.

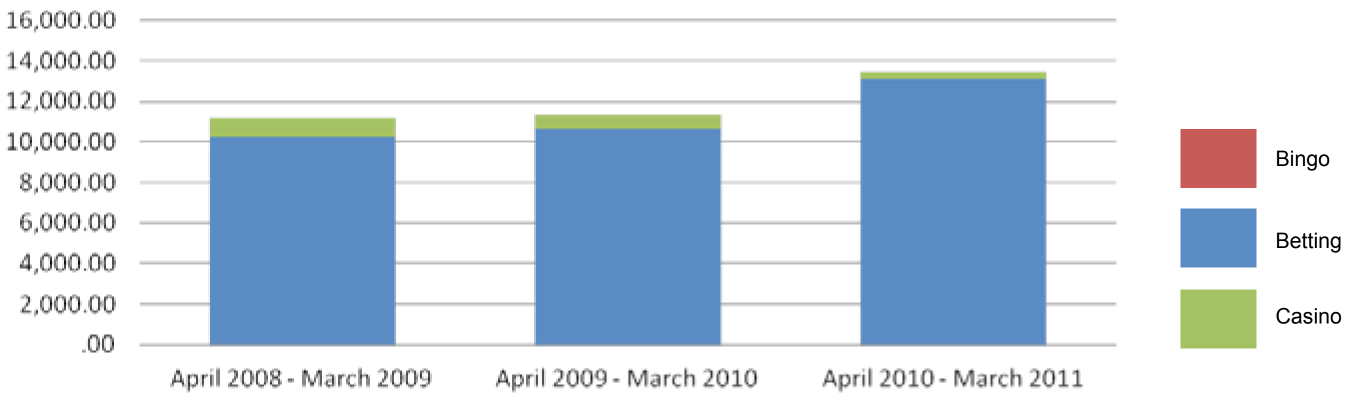
General information about remote betting, bingo and casino

In the last two years since 2008/9 Commission regulated GGY (which includes both UK and overseas consumer activity conducted in reliance on a Commission licence) has decreased by 19% due to the relocation of significant UK brands overseas. The 5% increase in the GGY of Commission regulated operators in the last 12 months is primarily attributable to growth by existing operators rather than new entrants to the market. We expect the GGY from Commission licensed operators to decline in the future as the effect of Betfair moving offshore is seen in regulatory return data. Further relocations of operators overseas cannot be ruled out.

Table 62: Remote sector turnover excluding betting exchanges[32]

	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
Betting	10,263.69	10,600.15	13,081.44	23%
Bingo	0.47	16.39	26.75	63%
Casino	950.07	678.89	347.87	-49%
Total	**11,214.23**	**11,295.43**	**13,456.07**	**19%**

Fig 15: Remote sector turnover excluding betting exchanges £m



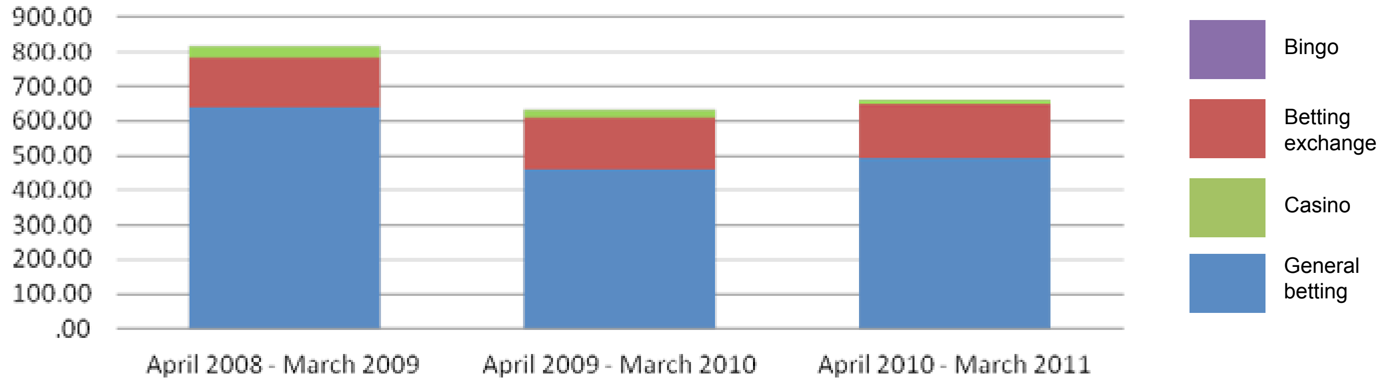
32 Figures only relate to UK operators licensed by the Commission who are operating in remote markets.

Gross gambling yield

Table 63: Remote sector GGY including betting exchanges

	Apr 2008 - Mar 2009 £m	Apr 2009 - Mar 2010 £m	Apr 2010 - Mar 2011 £m	% change (from 2009/2010 - 2010/2011)
General Betting	640.77	461.85	491.50	6%
Betting Exchange	142.54	146.01	154.10	6%
Bingo	0.47	1.22	2.25	84%
Casino	33.08	22.43	12.89	-43%
Total	**816.86**	**631.51**	**660.74**	**5%**

Fig 16 GGY from remote gambling activities £m (including betting exchanges)



General information about remote betting, bingo and casino

Employees

Table 64: Remote sector employees

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Number of employees	8,918	7,233	6,387	-12%

Customer accounts

Table 65: Number of customer accounts and funds held

	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Customer accounts (for Commission licensed facilities) millions	16.14	15.98	13.28	-17%
Active customer accounts millions	4.92	4.15	3.50	-16%
New player registrations millions	4.22	3.79	3.36	-11%
Funds held in customer accounts £m	281.02	273.31	280.03	2%

Self exclusions recorded by operators

Table 66: Remote sector self exclusions

	Self exclusions			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Self exclusions	46,359	39,761	35,275	-11%
Known breaches of self exclusion	7,198	7,444	2,619	-65%
Number of individuals who cancelled their self exclusion after minimum exclusion period	1,540	1,483	1,656	12%

The number of people who have self excluded and the number of people who have cancelled their self exclusion may be lower than these figures as individuals may have self excluded from more than one site or operator and thus been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals.

Gambling where individuals were unable to prove their age

Table 67: Remote sector age challenges

	Underage challenges			
	Apr 2008 - Mar 2009	Apr 2009 - Mar 2010	Apr 2010 - Mar 2011	% change (from 2009/2010 - 2010/2011)
Challenged when attempting to gamble but unable to prove age	159	115	75	-35%

Appendix 1

Regulatory returns analysis (methodology)

Regulatory returns must be completed annually by most operators and quarterly by some operators (the large betting operators, casino and remote operators). The date on which returns fall due depends on the date chosen by the particular licence holder, for example, it may coincide with an organisation's own reporting cycle, may be on an annual calendar year basis or run from 1 September to 31 August in line with the date that the 2005 Act came into force. In addition:

- annual regulatory returns must be submitted within 42 days of the date on which the return falls due
- quarterly returns must be submitted within 28 days of the date on which the return falls due
- lottery submissions must be made within 90 days of a draw being made or of the last scratch-card being sold.

This means that in some instances the Commission has had to provide estimated figures for the period 1 April 2010 to 31 March 2011. The diagram below indicates how we make that estimation.

When providing figures covering a particular period, the Commission includes all returns that fall wholly or partially within that reporting period. For each operator that submits an annual return, a weighted average is calculated based on the number of days each of the two returns relates to the reporting period. No such calculation is required for quarterly submitted returns as they fall wholly within the reporting period. Where an operator's annual returns cover only part of the period in question the figure has been adjusted to produce an estimate for the full year. For example, an operator with a reporting year running to 31 December will not yet have provided data for the latter three months of the period 1 April 2010 to 31 March 2011 (return due 11 January 2012); in this case the annual figures on the return to 31 December 2010 have been taken as a proxy for the full calendar year.
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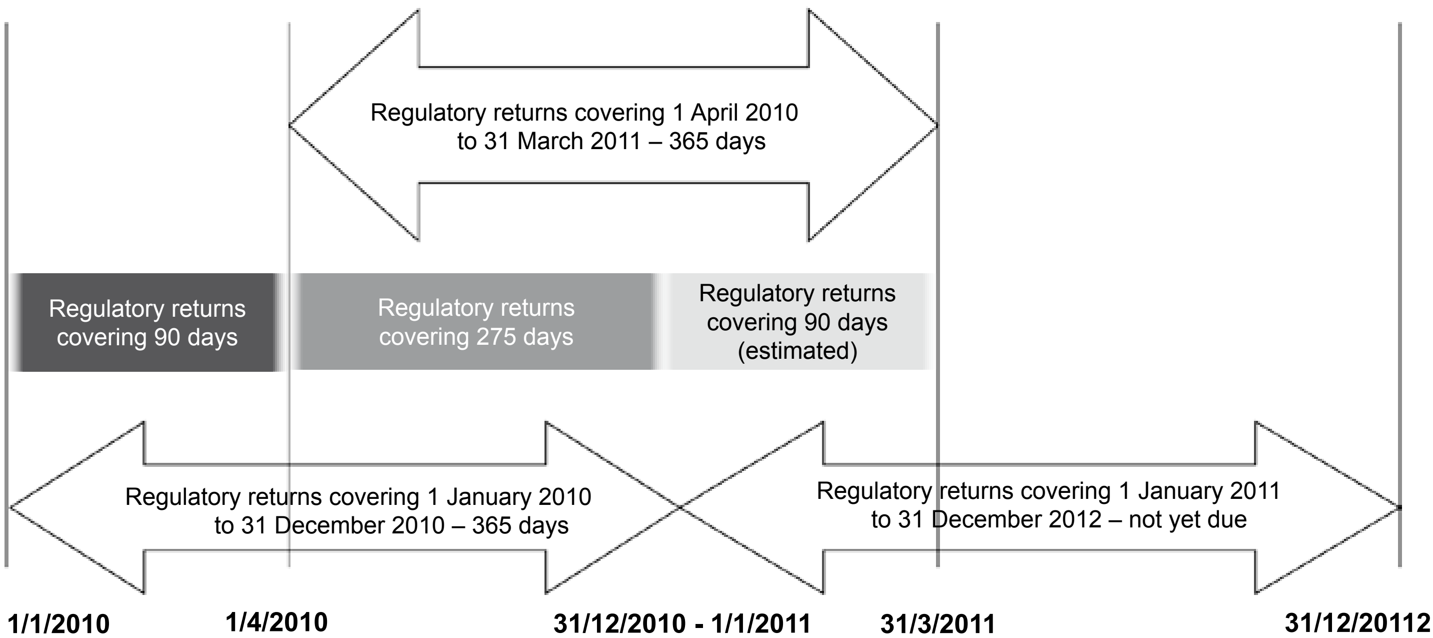


Merger acquisitions are commonplace in some sectors of the gambling industry. This could result in some duplication of data provided in regulatory returns.

Appendix 2

Appendix 2

Terminology

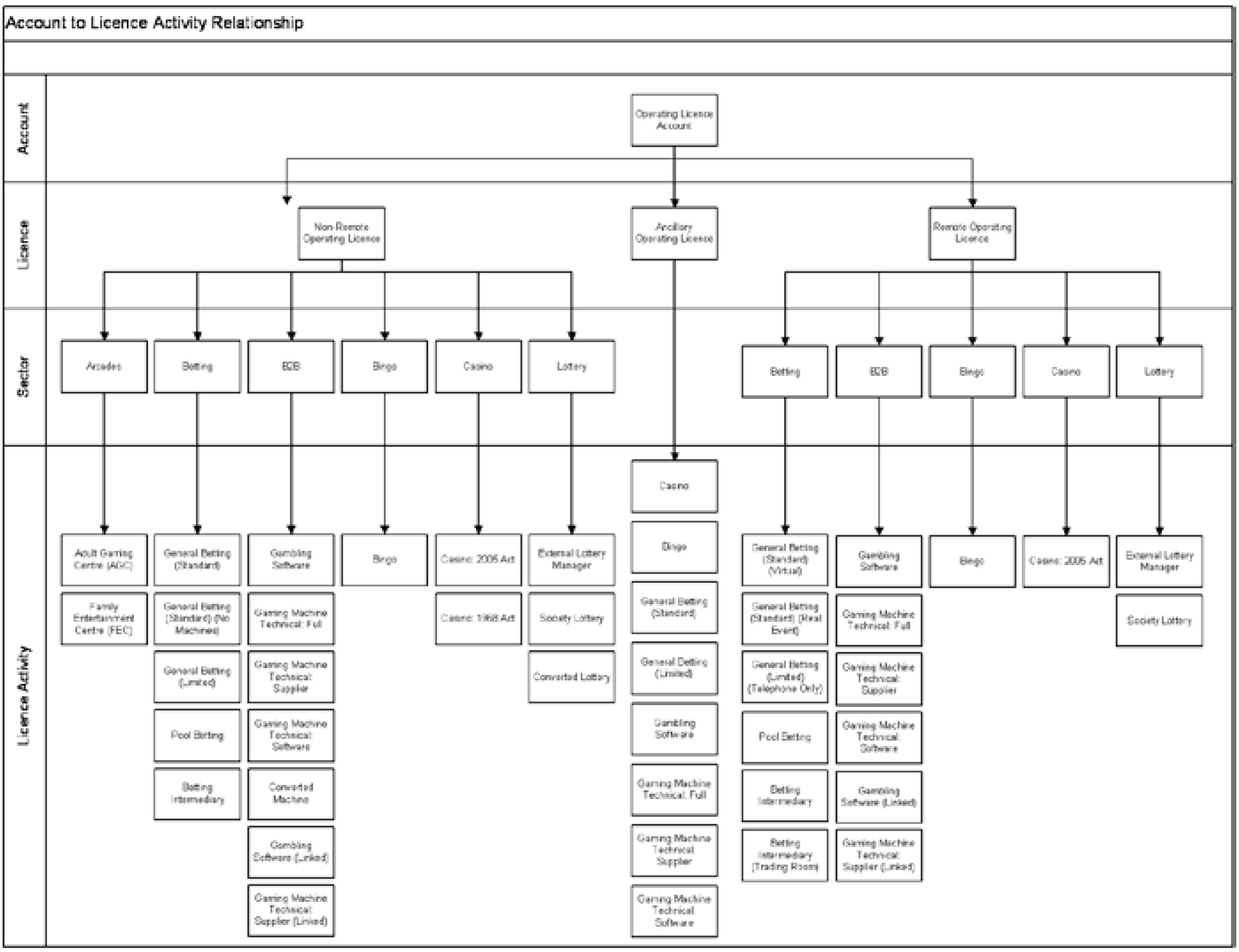
Account - an account represents an entity (for example, public limited company, limited company, partnership, individual) that holds an operating licence.

Gross gambling yield (GGY) - the amount retained by operators after the payment of winnings but before the deduction of the costs of the operation.

Licence - an account may incorporate one or more licences. There are three types of licence that an operator account can hold and these are non-remote, remote and ancillary.

Licensed activity - a licence may authorise one or more activity. A licensed activity is the actual type of gambling/ gaming function provided by the operating licence such as bingo or a lottery. These licensed activities can be grouped under sectors, and some sectors may incorporate one or many licensed activities.

Sector – the area of a particular gambling activity, for example, the betting sector, the arcades sector.



Appendix 3

Useful contacts

Organisation	Address	Website and email
Administration of Gambling on Tracks Ltd (AGT)	3a Kings Hall, St Ives Business Park, St Ives, Cambridgeshire PE27 4WY	www.agt-ltd.co.uk mainoffice@agt-ltd.co.uk
Association of British Bookmakers (ABB)	Ground Floor, Warwick House, 25 Buckingham Palace Road, London, SW1W 0PP	www.abb.uk.com mail@abb.uk.com
Betting Exchange Trade Association (BETA)	PO Box 34467, London W6 9WS	www.betfair.com corporate@betfair.com
Bingo Association	Lexham House, 75 High Street, North Dunstable, Bedfordshire LU6 1JF	www.bingo-association.co.uk enquiries@bingo-association.co.uk
British Amusement Catering Trade Association (BACTA)	134-136 Buckingham Palace Road, London SW1W 9SA	www.bacta.org.uk info@bacta.org.uk
British Association of Leisure Parks, Piers and Attractions (BALPPA)	Suite 12, 37 Tanner Street, London SE1 3LF	www.balppa.org info@balppa.org
British Beer & Pub Association	Ground floor, Brewers' Hall, Aldermanbury Square, London EC2V 7HR	www.beerandpub.com enquiries@beerandpub.com
British Holiday & Home Parks Association Ltd (BHHPA)	Chichester House, 6 Pullman Court, Great Western Road, Gloucester GL1 3ND	www.bhhpa.org.uk enquiries@bhhpa.org.uk
British Horseracing Authority (BHA)	75 High Holborn, London WC1V 6LS	www.britishhorseracing.com info@britishhorseracing.com
Business in Sport and Leisure (BISL)	17a Chartfield Avenue, Putney, London SW15 6DX	www.bisl.org info@bisl.org
Casino Operators Association (COA)	15 Livesey Street Sheffield S6 2BL	www.casinooperators association.org.uk gensec@coa-uk.org.uk
Financial Services Authority (FSA)	25 The North Colonnade, Canary Wharf, London E14 5HS	www.fsa.gov.uk
GamCare	2nd Floor, 7-11 St John's Hill, London SW11 1TR	www.gamcare.org.uk info@gamcare.org.uk
Gordon Moody House	Gordon Moody Central Office, 114 Wellington Road, Dudley, West Midlands DY1 1UB	www.gordonmoody.org.uk info@gordonmoody.org.uk
GREaT Foundation	The GREaT Foundation, 35 Piccadilly, London W1J 0DW	www.thegreatfoundation.org.uk info@thegreatfoundation.org.uk
Horserace Betting Levy Board	Parnell House, 25 Wilton Road, London, SW1V 1LW	www.hblb.org.uk enquiries@hblb.org.uk
Hospice Lotteries Association	Ty Hafan Childrens Hospice, St Hilary Court, Copthorne Way, Calderhouse Cross, Cardiff CF5 6ES	www.hospicelotteries.org.uk
Independent Betting Adjudication Service	PO Box 62639, London EC3P 3AS	www.ibas-uk.com adjudication@ibas-uk.co.uk
Lotteries Council	c/o 121 Fundraising Limited, The Wesley Annexe, Jockey Bank, Ironbridge, Telford TF8 7PD	www.lotteriescouncil.org.uk tina@lotteriescouncil.org.uk

Useful contacts

Organisation	Address	Website and email
National Casino Industry Forum (NCIF)	Carlyle House, 353 - 237 Vauxhall Bridge Road London SW1V 1EJ	www.nci-forum.co.uk director@nci-forum.co.uk
Pools Promoters' Association	Sportech House, Enterprise Way, Liverpool L13 1FB	www.sportechplc.com enquiries@sportechplc.com
Racecourse Association (RCA)	Winkfield Road, Ascot, Berkshire SL5 7HX	www.britishracecourses.org info@racecourse association.co.uk
Racecourse Promoters' Association (RCPA)	24 Lancashire Road, Bishopston, Bristol BS7 9DL	www.rcpa.co.uk info@rcpa.co.uk
Remote Gambling Association	6th Floor, High Holborn House, 52-54 High Holborn, London WC1V 6RL	www.rga.eu.com
Responsible Gambling Fund & Responsible Gambling Strategy Board	16 St Martin's le Grand, London EC1A 4EN	www.rgfund.org.uk enquiries@rgf-rgsb.org.uk www.rgsb.org.uk enquiries@rgf-rgsb.org.uk
Scottish Independent Bookmakers' Association (SIBA)	White Craigs House Glasgow G46 6SN	mail@abb.uk.com

keeping gambling fair and safe for all

For further information or to register your interest in the Commission please visit our website at:
www.gamblingcommission.gov.uk

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