



***1 Gambling Commission - Industry statistics 2009 - 2012***

***Industry statistics***

***April 2010 to September 2014***



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**Preface**

**Preface**

1. These detailed statistics relating to the gambling industry in Great Britain have been collated by the Gambling

Commission (the Commission). The sources are:

* regulatory returns required to be submitted by all licensed operators
* information provided by operators through correspondence with the Commission
* information provided by regulatory partners and by a commercial provider[[1]](#footnote-1).

1. This report provides statistics covering the following periods and provides a half-yearly update on the previously published figures:

* 1 April 2010-31 March 2011
* 1 April 2011-31 March 2012
* 1 April 2012-31 March 2013
* 1 April 2013-31 March 2014
* 1 October 2013-30 September 2014

1. More recent data (up to 31 March 2015) are also included where available and we have indicated where this is the case.
2. Figures are either representative of the position at the end of the year concerned, or reflect an average of values for dates falling within each 12 month period; whichever is the case is clearly stated.
3. Operators should have submitted all regulatory returns due for the full year period ending prior to 30 September 2014. Accordingly those figures are correct as of the date of publication, although they may be subject to further change as a result of overdue returns or where we subsequently identify errors that operators have made in their submissions. Consequently it is not uncommon to see published figures differ across publications for the same time period. The more recent figures are provisional, and therefore subject to amendment within future industry statistics publications, because:
   1. some of the annual submissions made in the run-up to September 2014 will require estimates to be made (to ease the burden on operators, the Commission has adopted the policy of permitting operators to submit returns in line with their individual business reporting cycles – this is covered in more detail within Appendix 1)
   2. some returns are subject to outstanding queries with operators.
4. Up to March 2012, premises figures reported in this document were based on licensing authority notifications. Data from this source tended to be incomplete. As a result, from March 2013 onwards, premises figures are based on operators’ most recent regulatory returns. This approach relies solely on operators for information on their premises and provides the most robust premises information to date. Because the source of the data has changed, the figures from 31 March 2013 onwards should be seen as the first points in a new series and should not be compared with the previous data.
5. Headcount data uses the figures detailed on the last return submitted.
6. The information contained in this document covers British terrestrial gambling (betting, bingo, casinos, arcades, gaming machines manufacturers, lotteries) and remote gambling. It does not cover spread betting because the Commission does not regulate this activity.
7. Where possible, we have provided comparator data which is consistent with the rest of this publication, with tables containing data from April 2010-March 2011 to October 2013-September 2014. Please note that in certain cases, as dictated by the complexity of the data conveyed, it has not been possible to provide data from previous periods in this format. In these cases, please follow links to copies of the [Gambling Commission Annual Reviews and Annual Reports](http://www.gamblingcommission.gov.uk/gh-about_us/annual_report_and_accounts.aspx).
8. The Commission’s methodology for providing annualised figures based on operators’ returns is included in Appendix 1.
9. The terminology used in this document is explained in Appendix 2.
10. Totals and percentages are calculated from unrounded figures and where appropriate totals are shown in outturn prices so do not take into account inflation.

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**Preface**

1. Further statistics and information relating to the Commission and its activities are available on our website in the [Gambling data and analysis section](http://www.gamblingcommission.gov.uk/gambling_data__analysis.aspx).



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**Gambling industry data**

**Introduction**

**Market size (excluding the National Lottery)**

During the period October 2013–September 2014, the British commercial gambling industry generated a gross gambling yield (GGY - see appendix 2) of £7.1bn, an increase of 5% or £327m when compared with the previous publication.

The non-remote betting sector represents the largest market within the industry with a 46% share, followed by the British regulated remote sector (19%) and the casino sector (16%). However, during the period covered by this report, most British consumer remote gambling activity sites were regulated overseas. This will change for future publications of industry statistics which will include data from overseas gambling companies licensed by the Commission in line with the [Gambling (Licensing and Advertising) Act](http://www.gamblingcommission.gov.uk/gambling_sectors/remote_eg_online_gambling/about_the_remote_gambling_indu/about_remote_gambling/gambling_licensing_and_advert.aspx) 2014, which came into force on 1 November 2014. For further details on these changes, please see the Remote section of this document, starting on p36.

GGY increased across all sectors between October 2013-September 2014 and the previous year with the exception of arcades and bingo which reported a reduction.

For sales figures relating to [the National Lottery](http://www.natlotcomm.gov.uk/), please see page 46.

**Figure 1: Market share by GGY October 2013 to September 2014 (excluding the National Lottery)**

**Table 1: GGY comparisons (excluding the National Lottery)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **GGY (£m)** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| **Non-remote sector** | **4,772.36** | **4,964.08** | **5,233.85** | **5,358.81** | **5,443.66** |
| Arcades | 392.00 | 381.06 | 356.92 | 374.80 | 373.13 |
| Betting | 2,957.36 | 3,029.58 | 3,215.15 | 3,200.12 | 3,256.90 |
| Bingo | 625.58 | 680.64 | 700.37 | 672.83 | 659.35 |
| Casinos | 797.43 | 872.80 | 961.41 | 1,111.06 | 1,154.29 |
|  |  |  |  |  |  |
| **Remote betting, bingo and casino gambling** | **653.06** | **710.18** | **932.61** | **1,134.66** | **1,347.23** |
|  |  |  |  |  |  |
| Large Society Lotteries[[2]](#footnote-2) (remote and non-remote) | 170.12 | 233.36 | 284.17 | 306.83 | 336.11 |
| **Total** | **5,595.54** | **5,907.63** | **6,450.63** | **6,800.31** | **7,127.00** |

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**Gambling industry data**

Category B1, B2, B3 and C machine numbers (see Appendix 3 for information on machine categories) have increased between April 2010-March 2011 and October 2013–September 2014. Category B4 and D machines have declined during the same period. The make-up of gaming machines in bingo clubs has changed in recent years. The introduction and widespread use of electronic bingo terminals[[3]](#footnote-3) (EBTs) by a number of providers accounts for much of the increase in category C and category D machines since April 2010-March 2011. Originally introduced to the market as category D machines, the evidence suggests that a number of the handheld bingo terminals now operate with category C content.

**Table 2: Average gaming machine numbers across all gambling sectors**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine Category** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B1 | 2,603 | 2,788 | 2,675 | 2,676 | 2,729 |
| B2 | 32,862 | 33,350 | 33,366 | 34,706 | 35,059 |
| B3 | 12,709 | 13,491 | 15,610 | 17,142 | 17,232 |
| B4 | 438 | 256 | 227 | 210 | 223 |
| C | 49,285 | 46,366 | 49,649 | 61,493 | 69,440 |
| D | 49,847 | 65,021 | 65,297 | 53,313 | 42,832 |
| **Total** | **147,744** | **161,272** | **166,824** | **169,540** | **167,515** |

The total GGY for category B1, B2, and B3 machines across all gambling sectors showed growth in each of the reporting periods. B2 category machines generated 66% of the total machines GGY in the period October 2013–September 2014.

**Table 3: Gaming machine GGY across all gambling sectors (£m)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine Category (£m)** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B1 | 117.67 | 126.27 | 130.11 | 145.88 | 155.67 |
| B2 | 1,303.61 | 1,458.45 | 1,554.08 | 1,577.82 | 1,623.76 |
| B3 | 160.5 | 192.09 | 253.73 | 292.91 | 301.31 |
| B4 | 2.2 | 1.68 | 1.42 | 0.89 | 0.85 |
| C | 164.62 | 173.06 | 218.49 | 211.1 | 206.24 |
| D | 90.91 | 95.17 | 98.42 | 95.21 | 95.31 |
| Aggregated categories | 202.98 | 187.04 | 79.9 | 71.05 | 69.26 |
| **Total** | **2,042.49** | **2,233.77** | **2,336.16** | **2,394.86** | **2,452.40** |

As the Commission does not license pubs, clubs, working men’s clubs or family entertainment centres (FECs) operating under a local authority permit, we do not collect regulatory returns for those businesses. Therefore Table 2 and Table 3 do not represent activity in those sectors.

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**Gambling industry data**

The number of people working in the industry has declined overall between March 2014 and September 2014, continuing the trend seen in previous periods, with the exception of the remote sector which experienced an increase in the number of employees since March 2013.

**Table 4: Number of employees across all gambling sectors[[4]](#footnote-4)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employees** | **As at 31 Mar 2011** | **As at 31 Mar 2012** | **As at 31 Mar 2013** | **As at 31 Mar 2014** | **As at 30 Sep 2014** |
| Betting | 55,411 | 55,882 | 55,257 | 52,416 | 50,359 |
| Bingo | 18,495 | 15,829 | 15,190 | 14,145 | 14,019 |
| Casino | 13,949 | 14,701 | 15,010 | 15,611 | 15,211 |
| Arcades | 10,314 | 10,486 | 9,862 | 8,675 | 8,401 |
| Gaming machine technical | 7,673 | 7,604 | 7,293 | 6,860 | 6,618 |
| External lottery manager | 754 | 849 | 817 | 971 | 952 |
| Remote | 6,438 | 5,832 | 4,725 | 5,835 | 6,285 |
| **Total** | **105,361** | **103,579** | **100,861** | **97,653** | **95,227** |

**Participation in gambling activities**

Following the Commission’s 2010 consultation on collecting adult gambling prevalence data**,** we use questions in telephone omnibus surveys (conducted by ICM Research) as our main measure of gambling participation. Until 2012 the omnibus survey captured basic data on past four week participation. In 2012 the omnibus survey was expanded to more closely reflect the participation questions administered in the British Gambling Prevalence Survey series and to provide more in-depth information on mode and frequency of play. The survey collects data on past four week participation in gambling activities, mode of participation (online/in person) and frequency of play. The survey is conducted with 1,000 respondents per quarter and a rolling yearly average is reported on a quarterly basis. The published reports can be accessed in the [gambling data and analysis](http://www.gamblingcommission.gov.uk/Gambling-data-analysis/Gambling-data-analysis.aspx) section of our website.

Participation data is also collected through the Scottish Health Survey (SHeS) and Health Survey for England (HSE). In addition to this, these survey vehicles also collect data on problem gambling rates. In July 2014 the Commission published a report of the combined SHeS and HSE data. Further information on the SHeS and HSE can be accessed in the [gambling data and analysis](http://www.gamblingcommission.gov.uk/Gambling-data-analysis/Gambling-data-analysis.aspx) section of our website

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**Betting**



**Structure of the non-remote betting industry**

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**Betting**

The non-remote betting industry is made up of both on-course and off-course betting operators. As of 31 March 2015, there were 299 operators licensed for the activity non-remote general betting standard (off-course). This is a decrease of 51 from 31 March 2014. During the same period, there were 565 operators licensed for the activity non-remote general betting limited (on-course), a decrease of nine from 31 March 2014.

The betting industry in Great Britain is dominated by four operators and, as of 31 March 2015, their estates accounted for 86% of all betting shops.

**Table 5: Number of betting shops by operator**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Organisation** | **at 31 Mar 2011** | **at 31 Mar 2012** |  | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 31 Mar 2015[[5]](#footnote-5)** |
| William Hill | 2,350 | 2,320 |  | 2,345 | 2,382 | 2,309 |
| Ladbrokes | 2,097 | 2,131 |  | 2,227 | 2,271 | 2,205 |
| Gala Coral Group | 1,712 | 1,725 |  | 1,745 | 1,812 | 1,838 |
| Betfred | 840 | 1,345 |  | 1,369 | 1,383 | 1,381 |
| Tote | 514 |  |
| Other operators | 1,554 | 1,607 |  | 1,414 | 1,289 | 1,225 |
| **Total** | **9,067** | **9,128** |  | **9,100** | **9,137** | **8,958** |

The figures in Table 5 for 2011 through to 2012 are based on licensing authority notifications. The figures from column ‘at 31 Mar 2013’ onwards are taken from each operator’s most recent regulatory return.

**General information about the betting industry**

**Employees**

Employee numbers in the betting sector have decreased by 9% (5,052) between March 2011 and September 2014.

**Table 6: Betting sector employees**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar**  **2013** | **at 31 Mar**  **2014** | **at 30 Sep**  **2014** |
| Number of employees | 55,411 | 55,882 | 55,257 | 52,416 | 50,359 |

**Off-course betting**

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**Betting**

The turnover for horses has declined by over £424m (8%) between the reporting periods shown in Figure 2 and dogs decreased by over £131m (10%) across the same period. Football increased by over £287m (28%).

GGY figures followed a similar pattern with horses and dogs profits declining overall (although horses reported growth between April 2011-March 2012 and April 2012-March 2013). GGY from football increased overall with the size of profits determined largely by whether or not there was a major tournament that year (Figure 3).

The other category captures all betting activity outside of those already used in the chart. This includes both sporting and non-sporting activity.

**Figure 2: Off-course betting turnover (£m)**



**Figure 3: Off-course betting GGY (£m)**



The data tables for these charts can be found in the [Excel version of *Industry Statistics*.](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#1!B4)

**On-course betting**

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**Betting**

The overall turnover figures for on-course betting have declined by over £76m (23%) between the reporting periods and the same metric for dogs decreased by £14m (37%). Overall, horses turnover decreased by over £57m (21%) during this period. (Figure 4)

Between the reporting periods, GGY figures followed a similar pattern with horses and dogs profits declining by £1.3m (6%) and £1.4m (46%) respectively. Other GGY has increased by £0.63m (28%), whilst overall on-course profits have decreased by £2m (8%) (Figure 5).

**Figure 4: On-course betting turnover (£m)**



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**Figure 5: On-course betting GGY (£m)**



The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#1!L4).

**Pool betting**

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**Betting**

The overall turnover figures for pool betting have increased by £73m (15%) between the reporting periods. A decline in pool betting turnover figures were reported for dogs, other and football across the reporting periods, however horses’ turnover has increased by £80m (20%) during the same period (Figure 6).

GGY figures for the same period showed an increase in horses by £26m (30%) and a decrease in football by almost £10m (24%) resulting in an overall increase of £17m (13%) as shown in Figure 7.

**Figure 6: Pool betting turnover (£m)**





**Figure 7: Pool betting GGY[[6]](#footnote-6) (£m)**





The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#1!T4).

**Gaming machines in betting shops**

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**Betting**

The overall number of gaming machines in betting shops has increased by 1,806 (5%) since the year ending March 2011. GGY has shown year-on-year growth, increasing from £1.3bn in April 2010-March 2011 to £1.6bn in October 2013–September 2014, a rise of £308m (24%).

During the period October 2013–September 2014, the number of gaming machines in betting shops (Table 7) accounted for 21% of the total number of machines across all licensed gambling sectors.

The GGY from B2 machines in betting shops accounted for 66% of machine GGY across all machine types and gambling sectors in the period October 2013–September 2014, compared with 64% in April 2010-March 2011.

**Table 7: Average[[7]](#footnote-7) gaming machine numbers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B2 | 32,832 | 33,294 | 33,255 | 34,530 | 34,874 |
| B3 | 219 | 142 | 72 | 69 | 75 |
| C | 181 | 94 | 68 | 88 | 89 |
| **Total** | **33,232** | **33,530** | **33,395** | **34,687** | **35,038** |

**Table 8: Gaming machine GGY (£m)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B2 | 1,302.35 | 1,455.95 | 1,548.37 | 1,568.26 | 1,613.60 |
| B3 | 2.07 | 1.75 | 1.59 | 0.98 | 0.88 |
| C | 0.61 | 0.23 | 0.23 | 0.23 | 0.23 |
| Aggregated categories[[8]](#footnote-8) | 2.28 | 0.57 | 1.1 | 0.91 | 1.07 |
| **Total** | **1,307.31** | **1,458.50** | **1,551.29** | **1,570.38** | **1,615.78** |

In submitting regulatory return information for a machine or a terminal that offers games that equate to different machine categories, operators are required to submit information based on the highest category of game available. For example, if a terminal offers category B2 and B3 games, operators are advised to count this as a category B2 terminal. For this reason, the B2 and B3 figures in Table 7 and Table 8 should be viewed with caution as the split between B2 and B3 game play is not clear (and therefore a portion of the GGY attributed to B2 machines above will have been generated through B3 game play).

Details on the split between B2 and B3 content can be viewed in the Commission’s letter to DCMS entitled [B2/B3 machines data analysis.](http://www.gamblingcommission.gov.uk/pdf/letter%20to%20alison%20pritchard%20re%20b2-b3%20gaming%20machine%20analysis.pdf)

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**Betting**

**Off-course combined GGY**

Across the five year reporting periods, over the counter GGY decreased by £24.3m whilst gaming machine GGY increased by £309m and now accounts for over 52% of the total (Figure 8).

**Figure 8: Off-course betting sector breakdown of GGY (£m)**

**Self-exclusions recorded by operators**

There is an increase in the number of new self-exclusions, breaches of self-exclusions and individuals who cancelled their self-exclusion after the minimum period allowed. 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 because individuals may have self-excluded from more than one venue or operator and therefore been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals (Table 9).

**Table 9: Betting sector self-exclusions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013-Sep 2014** |
| New self-exclusions | 20,977 | 20,303 | 22,541 | 24,473 | 28,844 |
| Known breaches of self-exclusion | 10,509 | 11,071 | 14,788 | 19,585 | 21,002 |
| Number of individuals who cancelled their self-exclusion after minimum exclusion period | 2,774 | 2,720 | 3,741 | 4,749 | 5,802 |

**Gambling where individuals were unable to prove their age**

As of October 2011, the question ‘challenged when attempting to gamble but unable to prove age’ and the guidance issued in association with this question changed to ‘challenged having gambled and unable to prove age’ (Table 10).

**Table 10: Betting sector underage challenges**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013-Sep 2014** |
| Challenged upon entry but unable to prove age | 565,510 | 523,483 | 588,259 | 580,827 | 564,635 |
| Challenged when attempting to gamble but unable to prove age | 90,384 |  |  |  |  |
| Challenged having gambled but unable to prove age |  | 34,606 | 27,394 | 27,201 | 33,008 |

**Integrity in betting**

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**Betting**

As a result of the changes brought about by the Gambling (Licensing and Advertising) Act 2014, the Commission implemented a new process on 1 April 2014, including improvements in the ways in which data are captured and processed. Accordingly, we have made some changes to the data we are able to publish within this section of Industry Statistics.

In future publications we will be in a position to harmonise the dates of the data reported within each part of this section. Further details are included below.

**Process for dealing with potential betting integrity failures**

We log and assess all intelligence received before deciding how to proceed. To determine whether to launch an investigation, we carry out preliminary checks to establish:

* if the information is linked to previous intelligence
* if the event/betting activity that took place:
  + relates to a sporting event that occurred in Great Britain, and/ or
  + involves parties based within Great Britain, and/ or
  + occurred with a Gambling Commission licensed operator
* the Commission will then decide if it needs to investigate further on its own or if it may be more appropriately dealt with by sports governing bodies, police and other regulators at home or overseas, with whom we will share the information.

**Referrals to the Commission**

Due to the changes outlined above, the Commission is only in a position to publish data for the period April 2014 to March 2015.

Table 11 shows the breakdown of potential betting integrity failures notified to the Commission by source, with Figure 9 showing the corresponding proportionate split of referrals to the Commission by event.

**Table 11: Reports notified to the Commission broken down by source (1 April 2014 – 31 March 2015)**

|  |  |  |
| --- | --- | --- |
| **Source** | **Apr 2014- Sep 2014** | **Oct 2014- Mar 2015** |
| Betting operator | 69 | 82 |
| Sports governing body | 14 | 11 |
| Agency - police | 6 | 2 |
| Media Report |  | 2 |
| Public - General |  | 2 |
| Agency - foreign regulator | 4 | 1 |
| Others | 6 |  |
| **Total** | **99** | **100** |

**Figure 9: Reports notified to the Commission broken down by event (1 October 2014 – 31 March 2015)**

As of 31 March 2015, 14 cases are currently open.

**Closed cases**

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**Betting**

Table 12 shows the numbers of cases closed by event for each of the preceding 12 month periods for which the Commission holds data.

Reports received by the Commission can relate to both GB and non-GB sporting events (reflective of the nature of the betting markets offered by Commission licensed operators). As such the figures shown in Table 12 reflect this, with data including cases relating to both GB and non-GB events.

**Table 12: Closed Sports Betting Intelligence Unit cases[[9]](#footnote-9)**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| Football | 14 | 34 | 20 |
| Other | 14 | 12 | 9 |
| Tennis | 12 | 13 | 8 |
| Greyhounds | 2 | 5 | 5 |
| Horseracing | 4 | 7 | 4 |
| Cricket | 3 | 1 | 1 |
| **Total** | **49** | **72** | **47** |

The Commission does not disclose information on open cases due to the sensitive nature of inquiries.

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**Bingo**



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**Bingo**

**Structure of the non-remote bingo industry**

As of 31 March 2015, 209 operators held non-remote bingo licences. Table 13 details the premises figures for two large operators in this sector.

The figures in Table 13 up to 2012 are based on licensing authority notifications. The figures from 2013 onwards are taken from each operator’s most recent regulatory return.

**Table 13: Number of premises by operator[[10]](#footnote-10)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **at 31 Mar 2011** | **at 31 Mar 2012** |  | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 31 Mar 2015[[11]](#footnote-11)** |
| Gala Leisure Limited | [[12]](#footnote-12)267 | 143 |  | 140 | 137 | 135 |
| Mecca Bingo Limited | 103 | 97 |  | 97 | 98 | 97 |
| Other operators | 325 | 406 |  | 443 | 472 | 408 |
| **Total** | **695** | **646** |  | **680** | **707** | **640** |

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 held a premises licence up until 31 March 2012 and more recently where they are indicated as active on their regulatory returns.

**General information about the bingo industry**

**Employees**

Bingo employee numbers have decreased by 4,476 (24%) between March 2011 and September 2014.

**Table 14: Bingo sector employees**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 30 Sep 2014** |
| Number of employees | 18,495 | 15,829 | 15,190 | 14,145 | 14,019 |

This publication uses the employee figures detailed on the latest regulatory return submitted before the reporting date.

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**Bingo**

**Bingo turnover and GGY**

The overall turnover figures for bingo (Figure 10) have decreased by £159m (12%) between the reporting periods. Main stage bingo saw turnover decline by £83m (12%), mechanised bingo turnover declined £54m (10%) and prize bingo turnover declined by £22m (68%) between the reporting periods.

The overall GGY figures for bingo (Figure 11) have decreased by £39m (10%) between the reporting periods. Main stage bingo, mechanised bingo and prize bingo GGY have declined by £20m (15%), £7m (3%) and £12m (71%) respectively.

**Figure 10: Bingo turnover £m (ticket sales)**

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**Figure 11: Bingo GGY £m (participation fees)**





The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#2!B4).

**Gaming machines in bingo clubs**

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**Bingo**

The make-up of gaming machines in bingo clubs has changed in recent years. The introduction and widespread use of electronic bingo terminals (EBTs)[[13]](#footnote-13) by a number of providers accounts for much of the increase in category C and category D machines since April 2010-March 2011. Originally introduced to the market as category D machines, the evidence suggests that a number of the handheld bingo terminals now operate with category C content.

In the period October 2013–September 2014, the number of gaming machines in bingo licensed premises (Table 15) accounted for 31% (16% in April 2010-March 2011) of the total number of machines across all gambling sectors. Gaming machine GGY in bingo licensed premises accounted for 12% (11% in April 2010-March 2011) of gaming machine GGY across all sectors.

The overall increases in GGY for category B3 and C machines is in part due to a number of operators putting in place better systems to record GGY by category of machine, having previously recorded this detail as a total of GGY for all machines on site, and captured below as aggregated categories (Table 16).

**Table 15: Average gaming machine numbers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B3 | 3,788 | 4,643 | 6,446 | 7,498 | 7,767 |
| B4 | 240 | 195 | 183 | 148 | 131 |
| C | 14,840 | 16,413 | 21,183 | 31,527 | 40,190 |
| D | 5,022 | 17,804 | 19,411 | 11,217 | 4,418 |
| **Total** | **23,890** | **39,054** | **47,223** | **50,390** | **52,506** |

**Table 16: Gaming machine GGY (£m)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B3 | 58.08 | 76.32 | 129.74 | 153.01 | 159.40 |
| B4 | 1.73 | 1.35 | 1.12 | 0.71 | 0.62 |
| C | 71.61 | 81.00 | 119.11 | 107.28 | 102.54 |
| D | 5.02 | 8.10 | 19.04 | 18.73 | 16.42 |
| Aggregated categories[[14]](#footnote-14) | 87.74 | 98.47 | 22.76 | 14.06 | 18.26 |
| **Total** | **224.18** | **265.26** | **291.77** | **293.79** | **297.24** |

***Gambling Commission – Industry statistics April 2010 to September 2014* 21**

**Bingo**

Across the reporting periods bingo games GGY declined by 10% from £401m to £362m. Gaming machine GGY increased by 33% from £224m to £297m. In October 2013–September 2014 bingo game revenue accounted for 55% of total revenue (Figure 12).

**Figure 12: Bingo sector breakdown of GGY (£m)**

**Self-exclusions recorded by operators**

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 (Table 17).

**Table 17: Bingo sector self-exclusions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| New self-exclusions | 638 | 825 | 798 | 1,205 | 1,342 |
| Known breaches of self-exclusion | 31 | 38 | 30 | 62 | 86 |
| Number of individuals who cancelled their self-exclusion after minimum exclusion period | 171 | 243 | 280 | 388 | 413 |

**Gambling where individuals were unable to prove their age**

As of October 2011, the question ‘challenged when attempting to gamble but unable to prove age’ and the guidance issued in association with this question changed to ‘challenged having gambled and unable to prove age’.

**Table 18: Bingo sector age challenges**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| Challenged upon entry but unable to prove age[[15]](#footnote-15) | 223 | 3 |  |  |  |
| Challenged when attempting to gamble but unable to prove age | 76 |  |  |  |  |
| Challenged having gambled and unable to prove age |  | 104 | 76 | 186 | 231 |

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**Casinos**



**Casinos and the Act**

***Gambling Commission – Industry statistics April 2010 to September 2014* 23**

**Casinos**

**Gambling Act 2005 casinos**

Under Section 175(4) of the Gambling Act 2005 (the 2005 Act), 16 local council (licensing authority) areas were determined as potential locations for casinos. 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 of 30 September 2014 two large casinos had opened under the 2005 Act – Aspers (Stratford City) Limited in Newham and Aspers (Milton Keynes) Limited in Milton Keynes. At this time, seven operators held a 2005 Act casino operating licence and 12 of the 16 local authorities permitted to issue 2005 Act casino premises licences had begun their competition processes, comprising eight large (seven concluded) and four small (four concluded) casino applications.

Two additional 2005 Act casinos are expected to be open during 2015: the large casino being developed by Genting Casinos at the NEC in Solihull is due to open in mid-2015, and the first small casino is due to be opened by Grosvenor Casinos in Luton by the end of 2015.

**Gaming Act 1968 casinos**

At 30 September 2014, there were 186 Gaming Act 1968 (1968 Act) casino premises licences available, comprising 144 casinos operating, 24 casinos licensed but subsequently closed and 18 licensed but not currently operating.

**Structure of the non-remote casino industry**

There were 146 casinos operating at 30 September 2014. Following the sale of most of the Gala Casinos estate to Grosvenor Casinos in May 2013, there are now two companies which own the majority of casinos in the industry, namely Rank Group (Grosvenor Casinos and ‘G’ Casinos) with 64 casinos, and Genting UK (Genting Casinos/Clubs) with 40 casinos (Table 19).

**Table 19: Number of operating casinos**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Organisation** | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar**  **2013** | **at 31 Mar**  **2014** | **at 30 Sep**  **2014** |
| Rank Group (Grosvenor and  ‘G’ Casinos) | 37 | 36 | 38 | 63 | 64 |
| Genting UK (Genting Casinos) | 46 | 44 | 42 | 41 | 40 |
| Gala Coral Group (Gala Casinos) | 28 | 27 | 25 | 0 | 0 |
| London Clubs International | 11 | 10 | 11 | 9 | 9 |
| Other operators | 27 | 28 | 27 | 32 | 31 |
| 2005 Act Casinos |  | 1 | 1 | 2 | 2 |
| **Total** | **149** | **146** | **144** | **147** | **146** |

**Employees**

This publication uses the figures detailed on the latest regulatory return submitted before the reporting date.

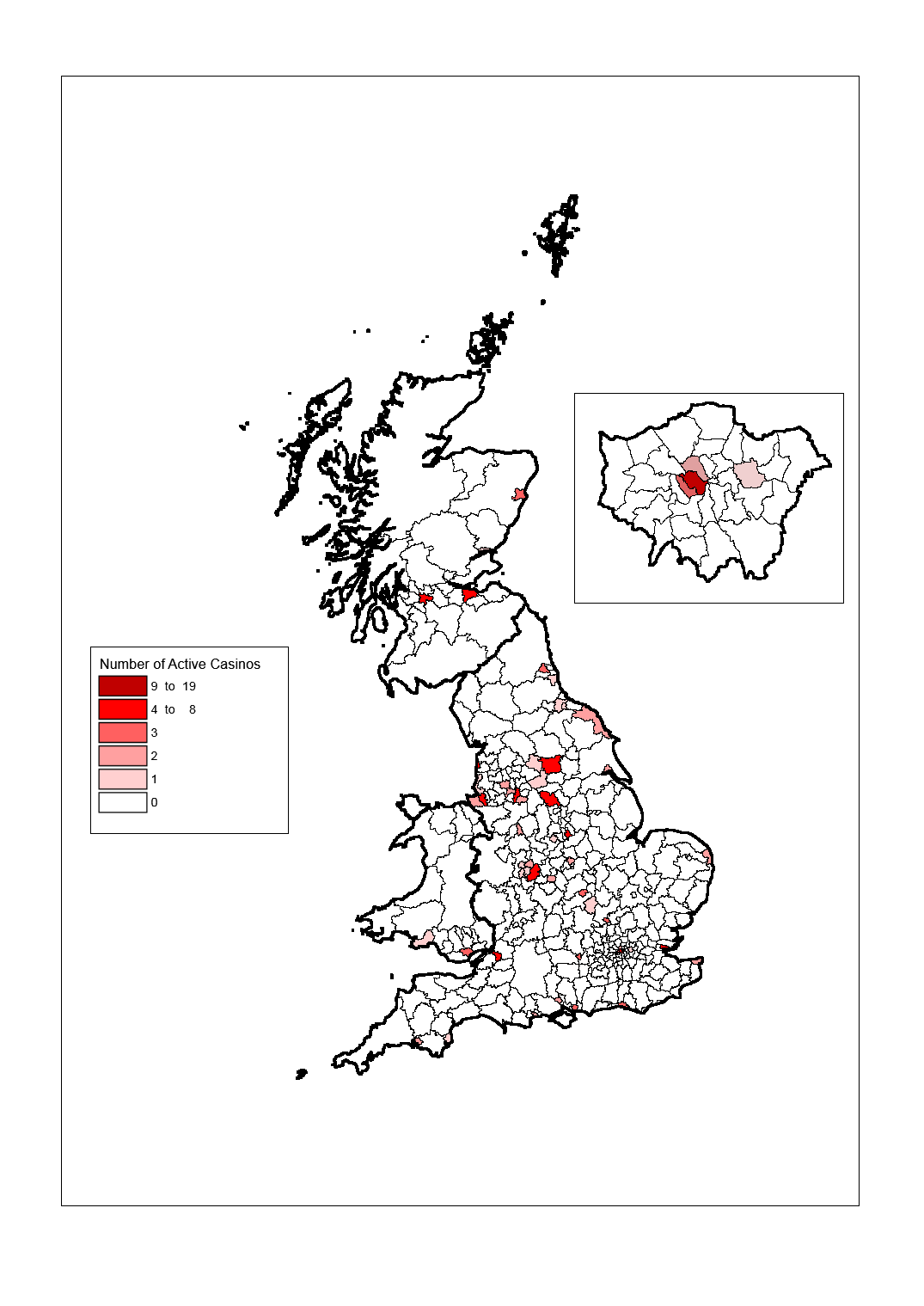
**Table 20: Casino sector employees**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar**  **2013** | **at 31 Mar**  **2014** | **at 30 Sep**  **2014** |
| Number of employees | 13,949 | 14,701 | 15,010 | 15,611 | 15,211 |

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**Casinos**

**Figure 13: Casino locations in Great Britain as at 30 September 2014 (Greater London shown in box)**



**Casino attendance**

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**Casinos**

Total GB casino attendance has increased during the reporting periods. Other London (London-based casinos not including the high end casinos) has seen the biggest growth in customer numbers, increasing from 3.55 million in April 2010-March 2011 to 6.44 million in October 2013–September 2014.

**Table 21: Casino attendance by region**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-**  **Mar 2011**  **m** | **Apr 2011-**  **Mar 2012**  **m** | **Apr 2012-**  **Mar 2013**  **m** | **Apr 2013-**  **Mar 2014**  **m** | **Oct 2013-**  **Sep 2014**  **m** |
| Scotland | 1.84 | 1.88 | 1.72 | 1.65 | 1.67 |
| North | 4.87 | 5.06 | 5.46 | 5.44 | 5.44 |
| Midlands & Wales | 4.01 | 4.14 | 4.03 | 3.69 | 3.72 |
| South | 2.96 | 3.04 | 3.03 | 3.41 | 3.58 |
| London high end[[16]](#footnote-16) | 0.16 | 0.16 | 0.14 | 0.16 | 0.16 |
| Other London | 3.55 | 3.96 | 5.50 | 6.47 | 6.44 |
| **Total** | **17.39** | **18.24** | **19.88** | **20.82** | **21.01** |

**Average industry table numbers**

The overall average industry table numbers have decreased by 27 (0.5%) over the five periods reported below. Casino stud poker has been in decline for a number of years and no longer features at many casinos.

**Figure 14: Average industry table numbers[[17]](#footnote-17)**







The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#3!B4).

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**Casinos**

**Drop and win**

Overall casino drop[[18]](#footnote-18) (Figure 15) has increased by £2.26bn (46%) since April 2010–March 2011. During this period punto banco drop has increased by £1.49bn (240%), reflecting its increased popularity with high value players.

Overall casino win (Figure 16) has increased by £309.6m since April 2010-March 2011. Punto banco win during this period increased by £161.5m (273%).

**Figure 15: Casino drop (£m)**

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****

**Figure 16: Casino win (£m)**



The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#3!B4).

**Gaming machines in casinos**

***Gambling Commission – Industry statistics April 2010 to September 2014* 27**

**Casinos**

The number of gaming machines in casinos (Table 22) has increased by 288 (11%) across the five reporting periods. Category B1 machines continue to be in the majority.

During the period October 2013–September 2014, the number of gaming machines in casinos accounted for 1.74% of the total number of machines across all gambling sectors. Gaming machine GGY in casinos accounted for 7% of gaming machine GGY across all sectors.

**Table 22: Average gaming machine numbers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| B1 | 2,603 | 2,788 | 2,675 | 2,676 | 2,729 |
| B2 | 30 | 56 | 111 | 175 | 185 |
| B3 | 4 | 11 | 9 | 14 | 11 |
| **Total** | **2,637** | **2,855** | **2,795** | **2,866** | **2,925** |

Overall casino gaming machine GGY (Table 23) increased year-on-year across the five reporting periods and by 34% since April 2009-March 2010.

**Table 23: Gaming machine GGY (£m)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| B1 | 117.67 | 126.27 | 130.11 | 145.88 | 155.67 |
| B2 | 1.26 | 2.50 | 5.71 | 9.56 | 10.17 |
| B3 | 0.07 | 0.17 | 0.35 | 0.45 | 0.42 |
| Aggregated categories[[19]](#footnote-19) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **119.00** | **128.95** | **136.18** | **155.89** | **166.26** |

There is year on year growth across all the reporting periods for both casino revenue streams (Figure 17) with casino games accruing 85.6% of the total GGY.

**Figure 17: Casino GGY (£m) revenue source yearly comparison**



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**Casinos**

**Self-exclusions recorded by operators**

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 (Table 24).

**Table 24: Casino sector self-exclusions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| New self-exclusions | 6,684 | 7,434 | 7,680 | 7,658 | 7,676 |
| Known breaches of self-exclusion | 636 | 1,001 | 931 | 899 | 984 |
| Number of individuals who cancelled their self-exclusion after minimum exclusion period | 1,448 | 1,480 | 2,015 | 2,324 | 2,743 |

**Gambling where individuals were unable to prove their age**

As of October 2011, the question ‘challenged when attempting to gamble but unable to prove age’ and the guidance issued in association with this question changed to ‘challenged having gambled and unable to prove age’.

**Table 25: Casino sector age challenges**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| Challenged upon entry but unable to prove age | 90 | 129 | 118 | 123 | 127 |
| Challenged when attempting to gamble but unable to prove age | 28 |  |  |  |  |
| Challenged having gambled but unable to prove age |  | 33 | 26 | 19 | 24 |

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**Arcades**



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**Arcades**

**Structure of the arcade industry**

As at 31 March 2015 there were 500 adult gaming centre (AGC) licences and 169 family entertainment centre (FEC) licences held by 540 operators.

**Table 26: Number of licences**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **at 31 Mar 2011** | **at 31 Mar**  **2012** | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 31 Mar 2015** |
| Adult gaming centre (AGC) | 577 | 546 | 535 | 504 | 500 |
| Family entertainment centre (FEC) | 235 | 212 | 192 | 176 | 169 |

Up to March 2012, premises figures reported in Table 27 were based on licensing authority notifications. Data from this source has historically tended to be somewhat incomplete. As a result, from March 2013 onwards, premises figures are based on operators’ most recent regulatory returns.

**Table 27: Number of arcade premises**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **at 31 Mar 2011** | **at 31 Mar**  **2012** |  | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 31 Mar 2015[[20]](#footnote-20)** |
| Adult gaming centre (AGC) | 2,103 | 2,247 |  | 1,671 | 1,618 | 1,522 |
| Family entertainment centre (FEC)[[21]](#footnote-21) | 293 | 295 |  | 362 | 379 | 316 |

**Number of employees**

The following table sets out the number of employees for the AGC and FEC sectors. FEC employee numbers have decreased by 50% since March 2011. For AGCs, employee numbers have fallen across the five-year period (in part driven by the recording of staff not directly involved in the AGC[[22]](#footnote-22)).

**Table 28: Arcade employees**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** |  | **at 31 Mar 2011** | **at 31 Mar**  **2012** | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 30 Sep 2014** |
| Number of employees | AGC | 17,923 | 9,794 | 9,212 | 8,088 | 7,914 |
| Number of employees | FEC | 977 | 692 | 650 | 587 | 487 |

This publication uses the employee figures detailed on the latest regulatory return submitted before the reporting date.

**Gaming machines in AGCs and FECs**

***Gambling Commission – Industry statistics April 2010 to September 2014* 31**

**Arcades**

The average number of gaming machines in AGCs has declined year-on-year across the five-year period. In the period October 2013–September 2014, the number of gaming machines in AGCs (Table 29) accounted for 30.11% (39.59% in April 2010-March 2011) of the total number of machines across all regulated gambling sectors (Table 2). Gaming machine GGY in AGCs has decreased to account for 12% (15% in April 2010-March 2011) of gaming machine GGY across all sectors.

**Table 29: Average AGC machine numbers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| B3 | 8,698 | 8,695 | 9,084 | 9,561 | 9,379 |
| B4 | 198 | 61 | 43 | 62 | 91 |
| C | 30,989 | 27,390 | 25,938 | 27,819 | 27,129 |
| D | 18,611 | 18,454 | 17,508 | 14,978 | 13,930 |
| **Total** | **58,496** | **54,600** | **52,573** | **52,419** | **50,530** |

**Table 30: AGC machine GGY (£m)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| B3 | 100.27 | 113.78 | 122.05 | 138.46 | 140.61 |
| B4 | 0.47 | 0.32 | 0.29 | 0.19 | 0.23 |
| C | 86.02 | 86.02 | 94.60 | 100.19 | 100.13 |
| D | 24.77 | 20.76 | 26.38 | 23.29 | 21.93 |
| Aggregated categories[[23]](#footnote-23) | 104.34 | 81.45 | 44.72 | 45.93 | 43.20 |
| **Total** | **315.88** | **302.40** | **288.05** | **308.07** | **306.09** |

In the period October 2013–September 2014, the number of gaming machines in FECs accounted for 15.8% (19.96% in April 2010-March 2011) of the total number of machines across all regulated gambling sectors (Table 31). Gaming machine GGY in FECs accounted for 3% (4% in April 2010-March 2011) of gaming machine GGY across all sectors (Table 32).

**Table 31: Average licensed FEC machine numbers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| C | 3,275 | 2,469 | 2,458 | 2,059 | 2,031 |
| D | 26,214 | 28,764 | 28,379 | 27,118 | 24,484 |
| **Total** | **29,489** | **31,233** | **30,837** | **29,177** | **26,515** |

**Table 32: Licensed FEC GGY**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** |
| C | 6.38 | 5.80 | 4.56 | 3.40 | 3.34 |
| D | 61.12 | 66.31 | 53.00 | 53.20 | 56.97 |
| Aggregated categories19 | 8.62 | 6.55 | 11.31 | 10.14 | 6.73 |
| **Total** | **76.12** | **78.66** | **68.87** | **66.73** | **67.04** |

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**Arcades**

**Self-exclusions recorded by operators**

The number of new self-exclusions for AGCs has increased by 259 (10%) whilst at the same time the number at FECs has decreased by 57 (28%) across the period covered in Table 33. 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.

**Table 33: Sector self-exclusions**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Licence type** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| New self-exclusions | AGC | 2,545 | 2,572 | 2,641 | 2,761 | 2,804 |
| FEC | 202 | 139 | 133 | 131 | 145 |
| Known breaches of self-exclusion | AGC | 83 | 119 | 112 | 140 | 154 |
| FEC | 51 | 43 | 12 | 16 | 13 |
| Number of individuals who cancelled their self-exclusion | AGC | 720 | 748 | 773 | 773 | 782 |
| FEC | 64 | 42 | 51 | 46 | 47 |

**Gambling where individuals were unable to prove their age**

As of October 2011, the question ‘challenged when attempting to gamble but unable to prove age’ and the guidance issued in association with this question changed to ‘challenged having gambled and unable to prove age’ (Table 34).

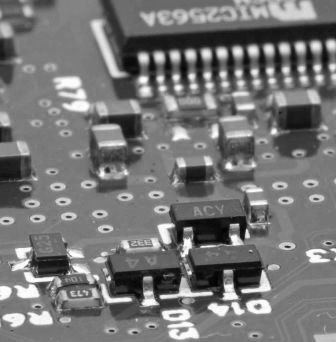
**Table 34: Arcade sector age challenges**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Licence type** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| Challenged upon entry but unable to prove age | AGC | 15,472 | 18,829 | 18,999 | 22,914 | 24,785 |
| FEC[[24]](#footnote-24) | N/A | N/A | N/A | N/A | N/A |
| Challenged when attempting to gamble but unable to prove age | AGC | 981 |  |  |  |  |
| FEC | 125 |  |  |  |  |
| Challenged having gambled but unable to prove age | AGC |  | 1,638 | 1,667 | 2,235 | 2,449 |
| FEC[[25]](#footnote-25) |  | 352 | 166 | 111 | 81 |

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**Gaming machine manufacturers**



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**Gaming machine manufacturers**

**Structure of the gaming machine manufacturing industry**

As of 31 March 2015 there were 538 operators holding 586 Gaming Machine Technical (GMT) licences[[26]](#footnote-26).

**Number of employees**

The following table sets out the number of employees in the GMT sector, with the figure having decreased by 1,055 (almost 14%) during the most recent set of data.

**Table 35: Gaming Machine Technical sector employees**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 30 Sep 2014** |
| Number of employees | 7,673 | 7,604 | 7,293 | 6,860 | 6,618 |

The employee numbers include headcount from all of the GMT licensed activities (including manufacturers, suppliers and software manufacturers).

All other data referenced in this section relates to regulatory returns submitted from operators holding a Gaming Machine Technical – Full (manufacturers) licence[[27]](#footnote-27).

**Gaming machine manufacturers**

The primary business of manufacturers is the design and manufacture / assembly of new gaming machines and game concepts for machine categories B-D. Larger manufacturers for the year were:

* Astra Novomatic Group (Astra Games/Bell Fruit/Empire Games)
* Scientific Games Group (Global Draw/Barcrest)
* Inspired Gaming.

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**Gaming machine manufacturers**

There are a number of manufacturers that submit their annual regulatory return information after the cut-off for inclusion in this edition of the Industry Statistics. This means that the October 2013-September 2014 figures, reported in Tables 36-37, should be treated as provisional. The next edition of Industry Statistics, scheduled for publication in November 2015, will contain a more up to date dataset for this period.

Table 36 sets out the number of newly manufactured gaming machines that were supplied into Great Britain by Commission licensed manufacturers. This figure does not include gaming machines manufactured by British companies and subsequently supplied overseas.

Category B2 machines are predominantly supplied on a profit share or lease basis and therefore some may not appear as sales in the below tables. However, a small number may be sold as a ‘no category’, whereby the terminal is supplied without game software installed at the point of sale. It will usually then be provided as an aftermarket product, again normally on a profit share basis.

**Table 36: Number of new machines sold**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B1 | 327 | 176 | 240 | 191 |
| B2 | 0 | 0 | 2,749 | 5,409 |
| B3 | 1,564 | 1,482 | 1,775 | 1,415 |
| B3A | 360 | 733 | 187 | 224 |
| B4 | 960 | 707 | 925 | 1,129 |
| C | 15,618 | 16,164 | 15,538 | 14,472 |
| D | 93 | 228 | 204 | 41 |
| D (cash) | 1,096 | 652 | 571 | 438 |
| D (non-monetary) | 664 | 488 | 290 | 358 |
| No category | 1,680 | 1,066 | 169 | 115 |
| **Total** | **22,364** | **21,696** | **22,648** | **23,792** |

Table 37 sets out the gross sales value derived for newly manufactured gaming machines as per Table 36 above.

**Table 37: Gross value of sales from new machines sold (£m)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Machine category** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013- Sep 2014** |
| B1 | 3.33 | 2.27 | 3.89 | 2.28 |
| B2 | 0.00 | 0.00 | 5.98 | 11.77 |
| B3 | 7.07 | 6.22 | 7.04 | 4.72 |
| B3A | 0.91 | 1.35 | 0.44 | 0.57 |
| B4 | 1.38 | 1.10 | 1.60 | 2.30 |
| C | 34.02 | 38.67 | 30.33 | 28.70 |
| D | 0.14 | 0.58 | 0.70 | 0.17 |
| D (cash) | 2.81 | 1.41 | 0.86 | 0.29 |
| D (non-monetary) | 2.77 | 2.90 | 2.31 | 2.25 |
| No category | 5.86 | 4.24 | 1.39 | 1.00 |
| **Total** | **58.29** | **58.74** | **54.53** | **54.07** |

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**Remote betting, bingo   
and casino**



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**Remote betting, bingo and casino**

**Remote gambling industry**

We work closely with H2 Gambling Capital ([www.h2gc.com](http://www.h2gc.com)), which provides us with the estimated figures[[28]](#footnote-28) for Tables 38 and 39.

It is estimated that global remote gambling GGY (excluding telephone betting) was almost £23.8bn during 2014, which represents approximately 10% growth on the previous year (Table 38). UK consumer GGY (including GGY generated with operators regulated overseas), which includes telephone betting, is estimated to have grown by approximately 23% between 2013 and 2014.

**Table 38: The global remote industry (excludes telephone betting)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **£m** | **Jan 2010-**  **Dec 2010** | **Jan 2011-**  **Dec 2011** | **Jan 2012-**  **Dec 2012** | **Jan 2013-**  **Dec 2013** | **Jan 2014-**  **Dec 2014** |
| GGY | 18,270 | 20,075 | 21,080 | 21,543 | 23,759 |

**Table 39: The UK consumer remote industry**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **£m** | **Jan 2010-**  **Dec 2010** | **Jan 2011-**  **Dec 2011** | **Jan 2012-**  **Dec 2012** | **Jan 2013-**  **Dec 2013** | **Jan 2014-**  **Dec 2014** |
| GGY | 1,940 | 2,040 | 2,064 | 2,444 | 2,997 |

**Structure of the British licensed remote gambling industry (pre November 2014)**

The remainder of the data in this section relates to the remote gambling industry in Great Britain before the implementation of the [Gambling (Licensing and Advertising) Act 2014](http://www.legislation.gov.uk/ukpga/2014/17/contents/enacted), which came into force on 1 November 2014. Unless specified, all data reflects the market before this change, therefore includes only UK and overseas consumer activity conducted under a Commission licence at that time. As such it is made up primarily as follows:

* some high street bookmakers that also offer remote gambling
* large remote-only operators
* smaller betting operators that operate remote gambling facilities themselves
* 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.

Future editions of Industry Statistics will include details of the market after the implementation of Gambling (Licensing and Advertising) Act 2014.

As of 31 March 2015 there were 691 remote gambling activity licences held by 419 operators.

**Table 40: Breakdown of remote gambling activities licensed by the Commission**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Activity** | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar 2013** | **at 31 Mar 2014** |  | **at 31 Mar 2015[[29]](#footnote-29)** |
| Gambling software[[30]](#footnote-30) | 85 | 93 | 97 | 90 |  | 208 |
| Casino | 21 | 23 | 27 | 29 |  | 176 |
| General Betting Standard - Real Event | 58 | 56 | 51 | 44 |  | 102 |
| Pool Betting | 50 | 47 | 45 | 46 |  | 70 |
| Bingo | 9 | 10 | 12 | 11 |  | 49 |
| General Betting Standard - Virtual Event | 14 | 15 | 17 | 13 |  | 37 |
| General Betting Limited (Telephone only) | 37 | 37 | 29 | 22 |  | 24 |
| Betting Intermediary | 9 | 10 | 10 | 10 |  | 18 |
| Betting Intermediary - Trading Room Only | 16 | 14 | 12 | 10 |  | 7 |
| **Total** | **299** | **305** | **300** | **275** |  | **691** |

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**Remote betting, bingo and casino**

**Turnover and GGY**

The turnover figures for the remote sector are dominated by betting which accounted for £31.5bn of the £32.5bn turnover in October 2013-September 2014. Betting turnover increased by almost £6.2bn (23%) since the April 2013-March 2014 period (Figure 18).

Overall GGY figures for the remote sector have increased year-on-year since April 2010-March 2011. Betting dominates and accounts for £1.19bn of the total £1.34bn in the year October 2013-September 2014. The betting exchange sector saw a large decrease in GGY during the period April 2011-March 2012, as a result of Betfair moving its previously Commission-regulated business offshore. Full pool betting datasets have only been available from the period April 2011-March 2012 (Figure 19).

**Figure 18: Amount wagered on remote gambling activities £m (excluding betting exchanges)**

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**Figure 19: GGY from remote gambling activities £m (including betting exchanges)**





The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#8!B4).

The Commission began collecting data on the full list of sports in the charts below in April 2011-March 2012 whereas previously, data on cricket, financials, golf and tennis was collected under other[[31]](#footnote-31). In the year October 2013-September 2014, turnover (Figure 20) and GGY figures (Figure 21) for the remote betting sector was dominated by football, other and tennis, accounting for over 89% of turnover and 90% of GGY for the reporting period.

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**Remote betting, bingo and casino**

**Figure 20: Remote betting sector turnover breakdown (£m)**





**Figure 21: Remote betting sector GGY breakdown (£m)**



The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#8!B4).

Turnover and GGY for the remote casino sector has decreased between the most recent reporting periods by £4.3m (1%) and £3.4m (12%) respectively.

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**Remote betting, bingo and casino**

**Figure 22: Remote casino sector turnover breakdown (£m)**

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**Figure 23: Remote casino sector GGY breakdown (£m)**

**Employees**

Employee numbers for the remote sector show a decline of 153 (2%) across the timeframe covered by Table 41, although the September 2014 figure shows an increase of 450 (8%) compared with the previous period.

**Table 41: Remote sector employees[[32]](#footnote-32)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **at 31 Mar**  **2011** | **at 31 Mar**  **2012** | **at 31 Mar**  **2013** | **at 31 Mar**  **2014** | **at 30 Sep**  **2014** |
| Number of employees | 6,438 | 5,832 | 4,725 | 5,835 | 6,285 |

The data tables for these charts can be found in the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#8!B4).

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**Remote betting, bingo and casino**

**Customer accounts**

Active customer accounts (defined as those accounts on which a customer has gambled within the last 12 months) has increased year on year. Customers will often have accounts with more than one operator and therefore the data in Table 42 relates to accounts rather than the individuals holding those accounts. In the latest period, player registrations numbers are at their highest level across the past five years.

**Table 42: Number of new customer accounts**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **Apr 2010-Mar 2011**  **m** | **Apr 2011-Mar 2012**  **m** | **Apr 2012-Mar 2013**  **m** | **Apr 2013-Mar 2014**  **m** | **Oct 2013- Sep 2014**  **m** |
| Customer accounts (for Commission licensed facilities) | 14.92 | 15.18 | 16.53 | 16.99 | 18.14 |
| Active customer accounts | 3.50 | 3.99 | 4.66 | 4.88 | 5.59 |
| New player registrations | 3.31 | 3.83 | 4.62 | 5.68 | 6.24 |

The value of funds held in customer accounts decreased in April 2011-March 2012, although most of this decrease is attributable to Betfair moving offshore during that time. This figure subsequently increased in April 2012-March 2013 and again during the last reporting period.

Customers gambling on betting exchanges tend to have more funds in their account as they need to have sufficient funds to cover the liabilities of their bets, rather than just have sufficient funds to cover the stake of the bets they intend to make.

**Table 43: Funds held in customer accounts**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Commission licensed activity** | **Apr 2010-**  **Mar 2011**  **£m** | **Apr 2011-**  **Mar 2012**  **£m** | **Apr 2012-**  **Mar 2013**  **£m** | **Apr 2013-Mar 2014**  **£m** | **Oct 2013- Sep 2014**  **£m** |
| Funds held in customer accounts | 265.95 | 147.13 | 185.09 | 205.15 | 228.29 |

**Gambling software**

For a full split of revenues, involving shared income[[33]](#footnote-33), please see the [Excel version of *Industry Statistics*](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#8!B58).

**Table 44: Gambling software income**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Sales £m** | | | | **Total revenue £m** | | | |
|  | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013-Sep 2014** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013-Sep 2014** |
| Game | 3.85 | 3.68 | 13.35 | 19.87 | 18.73 | 18.89 | 31.20 | 37.98 |
| Platform | 65.18 | 62.91 | 70.98 | 53.92 | 86.03 | 82.5 | 95.56 | 66.76 |
| Other | 1.72 | 0.65 | 9.72 | 7.67 | 2.45 | 2.97 | 14.13 | 12.33 |
| **Total** | **70.75** | **67.24** | **94.05** | **81.46** | **107.2** | **104.37** | **140.88** | **117.07** |

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**Remote betting, bingo and casino**

**Self-exclusions recorded by operators**

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 therefore been counted more than once. The number of breaches represents the number of separate incidents, rather than the number of individuals. The majority of the figures in the ‘known breaches of self-exclusion’ field are incidents where a customer has attempted to breach a self-exclusion but has been successfully detected and prevented from gambling by the operator.

**Table 45: Remote sector self-exclusions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-Sep 2014** |
| New self-exclusions[[34]](#footnote-34) | 33,953 | 34,321 | 37,746 | 69,405 | 142,797 |
| Known breaches of self-exclusion | 2,533 | 2,317 | 2,031 | 2,123 | 2,405 |
| Number of individuals who cancelled their self-exclusion after minimum exclusion period | 1,581 | 1,508 | 1,984 | 3,799 | 4,489 |

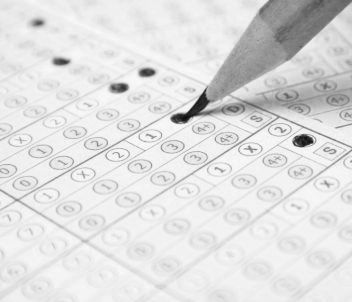
**Gambling where individuals were unable to prove their age**

As of October 2011, the question ‘challenged when attempting to gamble but unable to prove age’ and the guidance issued in association with this question changed to ‘challenged having gambled and unable to prove age’.

**Table 46: Remote sector age challenges**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-Sep 2014** |
| Challenged when attempting to gamble but unable to prove age | 74 |  |  |  |  |
| Challenged having gambled but unable to prove age |  | 188 | 432 | 493 | 651 |

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**Large society lotteries**

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**Large society lotteries**

**Structure of the large society lottery sector**

In order to offer society lotteries lawfully, the Act requires that the society hold either a registration with their local licensing authority or an appropriate licence from the Gambling Commission (dependent on the level of proceeds). Those lotteries licensed by the Gambling Commission are known as large society lotteries. Schedule 11, Part 4, section 31 of the Gambling Act 2005 requires a society to hold an operating licence from the Gambling Commission where:

• the proceeds in an individual draw exceed £20,000; or

• the aggregate lottery proceeds in a calendar year exceed £250,000

Below those thresholds a society may operate without a Gambling Commission licence, provided it is registered with its local licensing authority. These are known as small society lotteries.

As of 31 March 2015, there were 474 non-commercial society lottery operators holding 799 lottery licences (as set out in Table 47). 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 of 31 March 2015, there were 39 ELMs holding 53 licences.

**Table 47: Lottery licences**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Licence** | **Type** | **at 31 Mar 2011** | **at 31 Mar 2012** | **at 31 Mar 2013** | **at 31 Mar 2014** | **at 31 Mar 2015** |
| Society lottery | Non-remote | 445 | 484 | 467 | 459 | 466 |
| Remote[[35]](#footnote-35) | 182 | 233 | 148 | 141 | 147 |
| Ancillary remote | 0 | 0 | 119 | 151 | 186 |
| ELM | Non-remote | 25 | 32 | 29 | 30 | 35 |
| Remote | 16 | 19 | 17 | 18 | 18 |

**Employees**

ELM employee numbers have increased by 198 (26%) between March 2011 and September 2014.

**Table 48: ELM employees**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **at 31 Mar**  **2011** | **at 31 Mar**  **2012** | **at 31 Mar**  **2013** | **at 31 Mar**  **2014** | **at 30 Sep**  **2014** |
| Number of employees | 754 | 849 | 817 | 971 | 952 |

Headcount figures are detailed on the latest regulatory return submitted before the reporting date.

**Society lotteries**

The total proceeds for society lotteries have increased each year across all reporting periods. Expenses and balance (to good causes) have also all risen during these periods.

As a proportion of the total proceeds, balance (to good causes) decreased from 50% to 46% between April 2010 – March 2011 and October 2013 – September 2014. Prizes from proceeds increased slightly from 18% to 19% and expenses also increased from 32% to 35% during the same period.

**Figure 24: Lottery proceeds, expenses and prizes £m**

The data tables for these charts, including further data points can be found in the [Excel version of Industry Statistics](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#6!B4).

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**Large society lotteries**

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**The National Lottery**



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**The National Lottery**

**Structure of the National Lottery**

Following Parliamentary approval, the Gambling Commission and the National Lottery Commission merged on 1 October 2013. No change has been made to the legislation which governs how the National Lottery is regulated.

Since its launch in November 1994, the National Lottery has raised over £32bn for good causes that include sports, arts and heritage, as well as health and education and the environment. National Lottery funding contributed almost £2.2bn towards the costs of staging the London 2012 Olympic and Paralympics Games, including £750m from designated game sales.

The funds for the original good causes are held in the National Lottery Distribution Fund (NLDF).

**Sales**

Sales for the National Lottery games have increased from £5.8bn at April 2010–March 2011 to just under £6.9bn at October 2013–September 2014. Primary contributions[[36]](#footnote-36) (to good causes) have increased from £1.55bn to £1.58bn during the same period. Prizes and the amount retained by the licensee[[37]](#footnote-37) have also increased during this time.

**Figure 25: Breakdown of National Lottery proceeds (£m)[[38]](#footnote-38)**

The data tables for this chart, including further data points can be found in the [Excel version of Industry Statistics](http://www.gamblingcommission.gov.uk/docs/Industry-statistics-April-2008-to-September-2014.xlsx#7!B4) and previous annual reports on [the National Lottery website.](http://www.natlotcomm.gov.uk/publications-and-research.html)

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**Additional data about**

**the Commission’s activities**



Where possible, we have provided comparator data which is consistent with the rest of this publication, with tables containing data from April 2010-March 2011 to October 2013-September 2014.

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**Additional data about the Commission’s activities**

Please note that in certain cases, as dictated by the complexity of the data conveyed, it has not been possible to provide data from previous periods in this format. In these cases, please follow links to copies of the [Gambling Commission Annual Reviews and Annual Reports](http://www.gamblingcommission.gov.uk/gh-about_us/annual_report_and_accounts.aspx).

As highlighted in the Commission’s 2012/13 Annual Review document, the number of many of these activities, for example premises visits, has decreased when set against years prior to April 2012-March 2013.

**Major regulatory cases**

During October 2013-September 2014 the Commission completed the investigation of 32 major regulatory cases. During this period five cases resulted in a voluntary settlement.

A full split of cases for periods before these dates can be found in previous copies of the [Gambling Commission Annual Reviews and Annual Reports](http://www.gamblingcommission.gov.uk/gh-about_us/annual_report_and_accounts.aspx).

**Table 49: Major regulatory cases**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Oct 2013 –**  **Sep 2014** | **Advice to Conduct** | **Attach Conditions** | **Financial Penalty** | **Informal Resolution** | **No Further Action** | **Refer to Another Agency** | **Revocation** | **Surrendered** | **Voluntary Settlement** | **Warning** | **Warning & Condition** |
| Betting |  |  | 1 | 5 | 2 | 1 |  |  | 1 | 1 |  |
| Bingo | 1 | 1 |  | 2 |  |  |  |  | 1 |  | 1 |
| Business to business |  |  |  | 5 |  |  |  | 1 | 1 |  |  |
| Casino | 1 |  |  |  |  |  |  |  | 1 |  | 1 |
| Lotteries |  | 1 |  |  |  |  |  |  |  |  |  |
| Remote |  | 1 |  |  |  |  | 1 | 1 | 1 |  |  |
| **Total** | **2** | **3** | **1** | **12** | **2** | **1** | **1** | **2** | **5** | **1** | **2** |

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**Additional data about the Commission’s activities**

**Unlicensed enforcement activity**

The number of unlicensed enforcement activity cases completed by the Commission during the period April 2010-March 2011 and October 2013–September 2014 is detailed in the table below.

**Table 50: Unlicensed enforcement activity**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013-Sep 2014** |
| Cases closed | 33 | 26 | 13 | 34 | 26 |

**Personal licence revocations**

Table 51 shows personal licence revocations between April 2010-March 2011 and October 2013–September 2014. Note that the large increase in revocations is due to the fact that personal licence maintenance (PLM) checks commenced in October 2012, when personal licensees began to reach their five year anniversary.

In those cases where a personal licensee did not respond to the Commission’s contact when the maintenance check was due, typically because they had left the industry or had not kept the Commission informed of a change in address, failure to pay the maintenance fee led to their licence being revoked. The effect of this process is first seen in the year 2012/13, with the full year effect apparent in the year to September 2013. These revocations are technical revocations rather than representing regulatory sanctions.

**Table 51: Personal licence revocations**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Category** | **Apr 2010-Mar 2011** | **Apr 2011-Mar 2012** | **Apr 2012-Mar 2013** | **Apr 2013-Mar 2014** | **Oct 2013-Sep 2014** |
| Revoked following PLM check | - | - | 926 | 749 | 837 |
| Other reasons | 23 | 27 | 11 | 23 | 17 |
| **Total** | **23** | **27** | **937** | **772** | **854** |

Please see the Commission’s [sanctions register](http://www.gamblingcommission.gov.uk/pdf/regulatory%20sanctions%20register%20-%20personal%20licences.pdf) for a detailed breakdown of revocations for reasons other than the PLM check.

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**Additional data about the Commission’s activities**

**Compliance assessments**

Table 52 shows the number of compliance assessments undertaken since April 2010. These could take the form of visits to premises, desk-based assessment or website reviews.

Please note that the total figures are shown for the preceding years, a full split between terrestrial and online (remote) can be found in previous copies of the [Gambling Commission Annual Reviews and Annual Reports](http://www.gamblingcommission.gov.uk/gh-about_us/annual_report_and_accounts.aspx).

**Table 52: Compliance assessments**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Apr 2010-**  **Mar 2011** | **Apr 2011-**  **Mar 2012** | **Apr 2012-**  **Mar 2013** | **Apr 2013-**  **Mar 2014** | **Oct 2013-**  **Sep 2014** | |
| **Sector** |  | **Terrestrial** | **Online (remote)** |
| Arcades | 526 | 332 | 130 | 267 | 268 | - |
| Betting | 1,249 | 925 | 391 | 536 | 554 | 70 |
| Bingo | 328 | 323 | 193 | 157 | 154 | 4 |
| Business to business | 120 | 89 | 50 | 106 | 178 | 5 |
| Casino | 352 | 244 | 186 | 92 | 85 | 17 |
| Lottery | 82 | 126 | 76 | 111 | 180 | 8 |
| **Total** | **2,657** | **2,039** | **1,026** | **1,269** | **1,419** | **104** |

As was highlighted in the Commission’s 2012/13 Annual Review document, the number of some of these activities has decreased when set against years prior to April 2012-March 2013. This reflects our increased focus on activities with the highest potential impact.

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**Additional data about the Commission’s activities**

**Licensed activity**

Table 53 shows the breakdown of activity between October 2013-September 2014 for new licences granted and for existing licences which have been surrendered, revoked, forfeited or lapsed.

Previous data can be found within copies of the [Gambling Commission Annual Reviews and Annual Reports](http://www.gamblingcommission.gov.uk/gh-about_us/annual_report_and_accounts.aspx).

**Table 53: New licensed activity[[39]](#footnote-39) and licensed activity surrendered, revoked, forfeited or lapsed**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Licensed activity**  **(Oct 2013 – Sep 2014)** | **New licensed activity** | | **Licensed activity surrendered** | | **Licensed activity revoked/forfeited/**  **lapsed** | |
| Non-remote | Remote | Non-remote | Remote | Non-remote | Remote |
| New casino | 0 | 40 | 0 | 1 | 0 | 2 |
| Existing casino | 2 | n/a | 2 | n/a | 1 | n/a |
| Bingo | 14 | 4 | 12 | 0 | 3 | 0 |
| General betting (standard) | 17 | 58 | 53 | 6 | 10 | 6 |
| General betting (limited) | 15 | n/a | 28 | n/a | 7 | n/a |
| General betting (telephone only) | n/a | 4 | n/a | 3 | n/a | 1 |
| Pool betting | 2 | 22 | 0 | 9 | 1 | 1 |
| Betting intermediary | 0 | 1 | 0 | 4 | 1 | 3 |
| Gaming machine general: AGC | 18 | n/a | 29 | n/a | 9 | n/a |
| Gaming machine general: FEC | 7 | n/a | 10 | n/a | 0 | n/a |
| Gaming machine technical: full | 5 | 0 | 8 | 2 | 3 | 0 |
| Gaming machine technical: supplier | 16 | 0 | 26 | 0 | 8 | 0 |
| Gaming machine technical: software | 1 | 3 | 4 | 0 | 1 | 0 |
| Gambling software | 6 | 45 | 4 | 2 | 2 | 2 |
| External lottery manager | 2 | 1 | 1 | 4 | 0 | 0 |
| Society lottery | 28 | 18 | 28 | 13 | 1 | 1 |
| **Total** | **133** | **196** | **205** | **44** | **47** | **16** |

For details of the number of operators licensed within each sector, please consult the earlier sections in this document.

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**Appendices**



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**Appendices**

**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 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 October

2013 to 30 September 2014. The diagram below indicates how we make that estimate[[40]](#footnote-40).

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 30 June 2015 will not yet have provided data for the latter part of the full reporting year (1 July 2014 – 30 June 2015).

**Figure 25: Methodology diagram**

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

A thorough cleansing of the regulatory returns data is undertaken for each *Industry Statistics* publication. This starts with the controls put in place to highlight to the operator potentially erroneous numbers at the point of their submission of the electronic returns and is continued with extensive scrutiny of the data by sector specialists and data analysts at the Commission.

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**Appendices**

**Appendix 2 - Terminology**

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

**Adult gaming centre (AGC)** – an arcade comprising a limited number of B3 and B4 machines and an unlimited number of category C and D machines. No one under the age of 18 is allowed to enter an AGC.

**Known breaches of self-exclusion** – includes the number of times any self-excluded customer has attempted to gain access to operators’ facilities, attempted to gamble, or actually gambled. It is not limited to an attempt to gamble, and includes attempts to enter premises or access online gambling facilities.

**Casino drop and win data** – is provided voluntarily by all casinos (licensed by the Commission) on a monthly basis, and shows the amount of money exchanged for chips in a casino (drop) and the amount retained by the casino (win). The *Industry Statistics* relies on drop and win data for premises information and attendance information. The latest [drop and win](http://www.gamblingcommission.gov.uk/Gambling-data-analysis/statistics/Casino-drop-and-win-data.aspx) is on our website.

**External lottery manager (ELM)** – a person or body that makes arrangements for a lottery on behalf of a society or local authority of which they are not a member, officer or employee. A society or local authority may employ an ELM to promote all or some of its lottery.

**Family entertainment centre (FEC)** – an arcade comprising unlimited category C and D machines. Under 18s are allowed in FECs but not into the area offering category C machines.

**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 licensed operator may be authorised to carry out one or more licensed activity. A licensed activity is the actual type of gambling function permitted through an operating licence in a particular sector such as bingo or a lottery.

**Numbers** – is the term used to capture virtual content and lotto style games such as ‘49’.

**Pool betting** – is wagering where the winnings are determined with reference to the total stakes placed on that event.

**Regulatory returns** – a means of collecting a range of information from licence holders within the gambling industry in order to monitor compliance with gambling legislation, regulations and the [licence conditions and codes of practice](http://www.gamblingcommission.gov.uk/Publications-consultations/LCCP.aspx), and to inform the Commission’s understanding of the industry. Forms used to complete regulatory returns are determined by sector and can be found on the Commission’s website.

**Sector** – there are six industry sectors regulated by the Commission – arcades and gaming machines, betting, bingo, casinos, lotteries and remote (which includes remote betting, bingo and casinos). A number of licensed activities may take place within each sector.

**Self-exclusion** – is an agreement between an individual and an operator whereby the operator takes all reasonable steps to refuse services or to otherwise prevent an individual from participating in gambling at their premises or by using their facilities. The minimum period of self-exclusion is six months.

**Turnover** – the amount accrued through the sale of their product (bingo book/betting slip/lottery ticket/software etc) before winnings and overheads/expenses are deducted.

**Appendix 3 - Gaming machine categorisation**

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**Appendices**

Gaming machines (fruit machines, slot machines) fall into categories depending on the maximum stake and prize available:

**Table 54: Gaming machine categorisation**

|  |  |  |
| --- | --- | --- |
| **Machine category** | **Maximum stake (from Jan 2014)** | **Maximum prize (from Jan 2014)** |
| A | Unlimited | Unlimited |
| B1 | £5 | £10,000[[41]](#footnote-41) |
| B2 | £100 | £500 |
| B3 | £2 | £500 |
| B3A | £2 | £500 |
| B4 | £2 | £400 |
| C | £1 | £100 |
| D non-money prize (other than crane  grab machine or a coin pusher or penny falls machine) | 30p | £8 |
| D non-money prize (crane grab  machine) | £1 | £50 |
| D money prize (other than a coin pusher or penny falls machine) | 10p | £5 |
| D combined money and non-money prize (other than coin pusher or penny falls machines) | 10p | £8 (of which no more than £5 may be a money prize) |
| D combined money and non-money prize (coin pusher or penny falls machines) | 20p | £20 (of which no more than £10 may be a money prize) |

Further information on machine entitlement can be seen in the Commission’s [Guidance to licensing authorities (Appendix A).](http://www.gamblingcommission.gov.uk/pdf/Appendix%20A.pdf)



***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**](http://www.gamblingcommission.gov.uk)

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1. Licensing authorities and H2 Gambling Capital ([www.h2gc.com](http://www.h2gc.com/)) [↑](#footnote-ref-1)
2. The Gambling Act 2005 requires that the society hold either a registration with their local licensing authority or an appropriate licence from the Gambling Commission (dependent on the level of proceeds). Those lotteries licensed by the Gambling Commission are known as large society lotteries. [↑](#footnote-ref-2)
3. Electronic bingo terminals (EBTs) are devices that enable the player to purchase a larger number of tickets than they would usually be able to handle from playing on paper. EBTs can also contain other gambling related content such as slot games. Originally introduced to the market as category D machines, the evidence suggests that a number of the EBTs now operate with category C content. [↑](#footnote-ref-3)
4. Full time and part time employees are included in these figures. [↑](#footnote-ref-4)
5. Most recent return submitted on before this date. [↑](#footnote-ref-5)
6. GGY can be higher than turnover as the GGY may not be accrued in the same reporting period. [↑](#footnote-ref-6)
7. Gaming machine numbers fluctuate during the year and as such operators are required to provide their average number of machines. [↑](#footnote-ref-7)
8. Where GGY figures have been provided but not broken down by machine category. [↑](#footnote-ref-8)
9. 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 since the original date of publication. [↑](#footnote-ref-9)
10. At the time of publication it has been identified that a number of operators have been recording the number of licensed premises incorrectly on the regulatory returns. This relates specifically to operators who offer bingo as exempt gaming in clubs (including members clubs, commercial clubs and miners’ welfare institutes) and have hit the threshold for high turnover bingo (as defined by sections 275). These operators are required to hold an operating licence, but not a premises licence, if the gaming offered continues to meet the requirements for exempt gaming. However, a number have been recording figures against the ‘active premises’ category on the regulatory returns and as such the figures reported in this document, which represent the number of licensed bingo premises, may have been inflated. We are continue to review these returns and any errors are rectified. [↑](#footnote-ref-10)
11. Most recent return submitted on before this date. [↑](#footnote-ref-11)
12. This spike in premises numbers is the result of this operator choosing to split premises, which resulted in two or more premises licences being operational in a single building.  Following an amendment to the way in which category B gaming machines allowances are calculated, the majority of splits were subsequently removed and so the number of premises licences returned to a level more consistent with previous years. [↑](#footnote-ref-12)
13. Electronic bingo terminals (EBTs) are devices that enable the player to purchase a larger number of tickets than they would usually be able to handle from playing on paper. EBTs can also contain other gambling related content such as slot games. [↑](#footnote-ref-13)
14. Where GGY figures have been provided but not broken down by machine category [↑](#footnote-ref-14)
15. This question was removed in October 2011. Children and young people under 18 are allowed to enter 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 under 18s are allowed to enter. Although the law does not prevent under 18s from entering bingo licensed premises, the industry generally chooses to apply a no under 18s policy. [↑](#footnote-ref-15)
16. Casinos referred to as London ‘high end’ comprise six casinos agreed with the industry , which have a distinctive pattern of low volume attendance and high value gaming. [↑](#footnote-ref-16)
17. Electronic Gaming refers to player positions and not table numbers. Electronic gaming enables multiple players to participate in the same game of roulette, thus increasing player participation opportunities and reducing overheads. [↑](#footnote-ref-17)
18. For definitions of drop and win see Appendix 2. [↑](#footnote-ref-18)
19. Where GGY figures have been provided but not broken down by machine category. [↑](#footnote-ref-19)
20. Most recent return submitted on before this date. [↑](#footnote-ref-20)
21. Will only include those FECs licensed by the Commission, excludes those requiring only a permit from local licensing authorities. [↑](#footnote-ref-21)
22. The decrease in arcades employee numbers is in part due to the clarification given to motorway service area operators on the classification of staff directly associated with gambling activities. Previously some motorway service area operators had reported all staff on site as AGC employees even if they had no contact with the AGC. [↑](#footnote-ref-22)
23. Where GGY figures have been provided but not broken down by machine category. [↑](#footnote-ref-23)
24. Children are allowed in FECs [↑](#footnote-ref-24)
25. In over 18s areas only [↑](#footnote-ref-25)
26. Includes manufacturer, supplier and software machine licences. [↑](#footnote-ref-26)
27. For a full definition of the differences between the licensed activities, please visit our [website](http://www.gamblingcommission.gov.uk/gambling_sectors/gaming_machines/getting_a_licence_what_you_ne/do_i_need_a_licence/what_operating_licences_do_i_n.aspx). [↑](#footnote-ref-27)
28. Note that figures are liable to the effects of currency exchange fluctuations, which may magnify some of the changes. [↑](#footnote-ref-28)
29. Note this column reflects the position of licences after the implementation of the Gambling (Licensing and Advertising) Act 2014. [↑](#footnote-ref-29)
30. Includes both remote and non-remote licences. [↑](#footnote-ref-30)
31. The ‘Other’ category captures all betting activity outside of those listed in the table. This includes sporting activity and non-sporting activity. [↑](#footnote-ref-31)
32. The decrease in remote employee numbers prior to March 2014 is in part due to the clarification given to a number of operators on the classification of staff directly associated with remote gambling activities. [↑](#footnote-ref-32)
33. This includes the income generated from gambling software provided to organisations, for which royalties are received. [↑](#footnote-ref-33)
34. The increase is attributable to the introduction of automated self-exclusion process by an operator. [↑](#footnote-ref-34)
35. The decrease in remote society lottery licences at 31 March 2013 can be attributed to the introduction of a new ancillary remote licence which came into effect in April 2012. [↑](#footnote-ref-35)
36. Amount payable on sales figures less adjustments such as the National Lottery Promotions Unit (NLPU). They also include all other income and adjustments from game sales, including unclaimed prizes [↑](#footnote-ref-36)
37. Can include terminal and data communication costs, expenditure and gross profit. [↑](#footnote-ref-37)
38. Retailers commission and Lottery duty figures track the sales figures. [↑](#footnote-ref-38)
39. Excluding personal licences. [↑](#footnote-ref-39)
40. The amounts on each regulatory return (which are captured by the reporting period) are divided by 365 (366 if a leap year) and then multiplied by the number of days within the reporting period that is covered by each regulatory return. [↑](#footnote-ref-40)
41. With the option of a maximum £20,000 linked progressive jackpot on a premises basis only [↑](#footnote-ref-41)