[Gambling industry statistics April 2008 to March 2015 - Excel version]

10/11/12/13/14/15

Industry Statistics

April 2010 to March 2015

GAMBLING COMMISSION

Contents

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 that licensed operators submit
- information provided by operators through correspondence with the Commission

2. 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 April 2014 - 31 March 2015
- 1 April 2014 - 31 October 2014 (Remote only) as regulated under the Gambling Act 2005.
- 1 November 2014 - 31 March 2015 (New remote) as regulated under the Gambling (Licensing and Advertising) Act 2014 which came into force on 1 November 2014. Changes arising from the new legislation mean that the most recent data relating to the remote market cannot be treated as continuous with earlier data. For further details see section on 'remote betting, bingo and casinos'.

3. More recent data (up to 30 September 2015) are also included where available and we have indicated where this is the case.

4. 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.

5. Operators should have submitted all regulatory returns due for the full year period ending prior to 31 March 2015. 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:

a) some of the annual submissions made in the run-up to March 2015 will require estimates (to ease the burden on operators, the Commission has adopted the policy of permitting them to submit returns in line with their individual business reporting cycles – this is covered in more detail within Appendix 1)

b) some returns are subject to outstanding queries with operators.

6. 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.

7. Headcount data uses the figures detailed on the last return submitted.

8. The information contained in this document covers British terrestrial gambling (betting, bingo, casinos, arcades, gaming machines manufacturers, lotteries). It also covers remote gambling services offered to GB customers – from GB based operators and non GB based operators for Post November 2015 when the Gambling (Licensing and Advertising) Act came into force, and from GB based operators only prior to this date. It does not cover spread betting because the Commission does not regulate this activity.

9. 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 April 2014-March 2015. 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.

Preface

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

11. Future publications of Industry Statistics may include information which operators have provided voluntarily (for example a split of remote customers by gender or age, the Gross Gambling Yield (GGY[1]) derived from mobile devices or in-play activity) but we welcome views about the best ways in which to do this or whether indeed this data should form part of Industry Statistics. Please access this through Survey Monkey.

12. The terminology used in this document is explained in Appendix 2.

13. Totals and percentages are calculated from unrounded figures and where appropriate totals are shown in outturn prices are not adjusted for inflation.

14. Further statistics and information relating to the Commission and its activities are available on our website in the Gambling data and analysis section.

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

Gambling industry data

Introduction

Market size

During the period April 2014 - March 2015, the non-remote British commercial gambling industry (excluding the National Lottery and Society Lotteries data) generated a gross gambling yield or equivalent of £5.4bn. This represents an increase of 2% or £112m when compared with the previous year.

Over the same period, there has been a significant change in reporting practice for the remote gambling industry, reflecting an important change in the way that the industry is regulated. Up to October 2014, overseas operators did not require a Gambling Commission licence to supply gambling services to GB customers. From 1 November 2014, when the Gambling (Licensing and Advertising) Act came into force, all operators supplying gambling services to GB customers have had to be licensed by the Commission. Consequently, up to October 2014 the Commission did not record GGY from gambling services supplied to GB customers by overseas operators. From 1 November 2014, remote figures include for the first time GGY from operators based overseas but supplying services to GB customers. The remote data shown in table 1 for the 2014-15 financial year reflect five months under the new Act and seven months under the previous Act. As a result of this mid-year transition, it is not appropriate to compare remote data for 2014-15 with corresponding data for previous or future years. For further details on these changes, please see the Remote section of this document, starting on p32.

GGY increased across the National Lottery and non-remote betting and casinos in 2014-15, but decreased in the non-remote arcades and bingo sectors over the same period.

Table 1: GGY comparisons (including the National Lottery)

GGY (£m)	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
Non-remote sector	**4,772.33**	**4,964.06**	**5,220.07**	**5,331.94**	**5,444.40**
Arcades	392.00	381.06	357.90	377.46	371.66
Betting	2,957.32	3,029.56	3,199.58	3,171.02	3,249.42
Bingo	625.58	680.64	701.18	672.39	662.28
Casinos	797.43	872.80	961.41	1,111.06	1,161.05
Remote betting, bingo and casino gambling	653.06	710.19	932.61	1,134.66	753.53[2] 1,451.51[3]
National Lottery (remote and non-remote)	2,840.20	3,123.90	3,279.50	3,099.80	3,232.10
Lotteries (remote and non-remote)	170.12	233.36	284.17	306.83	361.62

[2] The figure represented reflects seven months data under the Gambling Act 2005 from 1 April 2014 to 31 October 2014.
[3] The figure represented reflects five months data under the Gambling (Licensing and Advertising) Act from 1 November to 31 March 2015.

Gambling industry data

Machines

Category B1, B2, B3 and C machine numbers (see Appendix 3 for information on machine categories) have increased between April 2010-March 2011 and April 2014-March 2015. 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[4] (EBTs) by a number of providers accounts for much of the increase in category C 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	Apr 2014 Mar 2015
B1	2,603	2,788	2,675	2,676	2,645
B2	32,862	33,350	33,410	34,667	34,725
B3	12,717	13,496	15,649	17,281	17,150
B4	438	256	228	213	224
C	49,294	46,377	49,801	61,751	71,221
D	49,847	65,021	65,540	53,736	40,844
Total	**147,761**	**161,287**	**167,303**	**170,324**	**166,809**

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 67% of the total machines GGY in the period April 2014-March 2015.

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

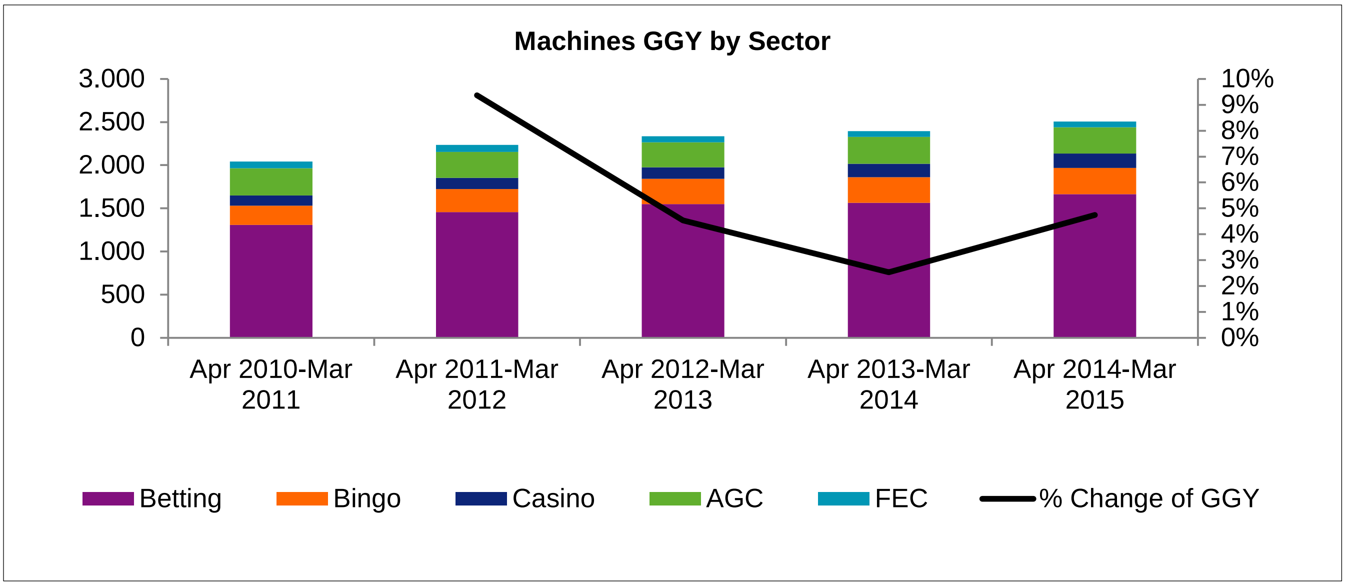
Machine Category (£m)	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B1	117.67	126.27	130.11	145.88	156.90
B2	1,303.61	1,458.45	1,554.08	1,577.82	1,675.74
B3	160.5	192.09	253.73	292.91	305.49
B4	2.2	1.68	1.42	0.89	0.85
C	164.62	173.06	218.49	211.1	213.22
D	90.91	95.17	98.42	95.21	96.97
Aggregated categories	202.98	187.04	79.9	71.05	58.35
Total	**2,042.49**	**2,233.77**	**2,336.16**	**2,394.86**	**2,507.52**

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.

[4] 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.

Gambling industry data

Figure 1: Gaming machine GGY across sectors (£m)



The data tables for these charts can be found in the [Excel version of Industry Statistics](#).

Gambling industry data

Employment

The number of people working in the industry has declined overall between April 2014 and March 2015, continuing the trend seen in previous periods. The number of employees for the remote sector is based on the most recent regulatory returns following the implementation of the Gambling (Licensing and Advertising) Act.

Table 4: Number of employees across all gambling sectors[5]

Employees	As at 31 Mar 2011	As at 31 Mar 2012	As at 31 Mar 2013	As at 31 Mar 2014	As at 31 Mar 2015
Betting	55,411	55,882	55,234	52,461	50,809
Bingo	18,495	15,829	14,939	14,093	13,040
Casino	13,949	14,701	15,010	15,611	15,566
AGCs	9,697	10,295	9,667	9,983	9,216
FECs	3,147	2,474	2,133	2,056	1,914
Gaming machine technical	7,673	7,604	7,306	6,882	6,372
External lottery manager	754	849	847	1,130	816
Remote	6,438	5,832	4,725	5,835	7,136[6]
Total	**115,564**	**113,466**	**109,861**	**108,051**	**104,869**

This publication uses the employee figures detailed on the latest regulatory return submitted before the reporting date. The employee numbers for gaming machine technical (GMT) include headcount from all of the GMT licensed activities (including manufacturers, suppliers and software manufacturers).

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 and Populus) 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 we report a rolling yearly average on a quarterly basis. The published reports can be accessed in the gambling data and analysis section of our website.

Participation data is also collected through the Scottish Health Survey (SHeS) and Health Survey for England (HSE). 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. Again, further information on the SHeS and HSE can be accessed in the gambling data and analysis section of our website

[5] Full time and part time employees are included in these figures.
[6] The figures represented are based on the most recent regulatory returns. The increase sector follows the implementation of the Gambling (Licensing and Advertising) Act which came into force on 1 November 2014.

Betting

Betting

Structure of the non-remote betting industry

The non-remote betting industry is made up of both on-course and off-course betting operators. As of 30 September 2015, there were 277 operators licensed for the activity non-remote general betting standard (off-course). This is a decrease of 22 from 31 March 2015. During the same period, there were 548 operators licensed for the activity non-remote general betting limited (on-course), a decrease of 19 from 31 March 2014.

The betting industry in Great Britain is dominated by four operators and, as of 30 September 2015, their estates accounted for 87% of all betting shops.

Table 5: Number of betting shops by operator

Organisation	at 31 Mar 2012	at 31 Mar 2013	at 31 Mar 2014	at 31 Mar 2015	at 30 Sep 2015[7]
William Hill	2,320	2,345	2,382	2,308	2,312
Ladbrokes	2,131	2,227	2,271	2,190	2,166
Gala Coral Group	1,725	1,745	1,812	1,838	1,850
Betfred	1,345	1,369	1,383	1,375	1,375
Other operators	1,607	1,414	1,270	1,241	1,116
Total	**9,128**	**9,100**	**9,118**	**8,952**	**8,819**

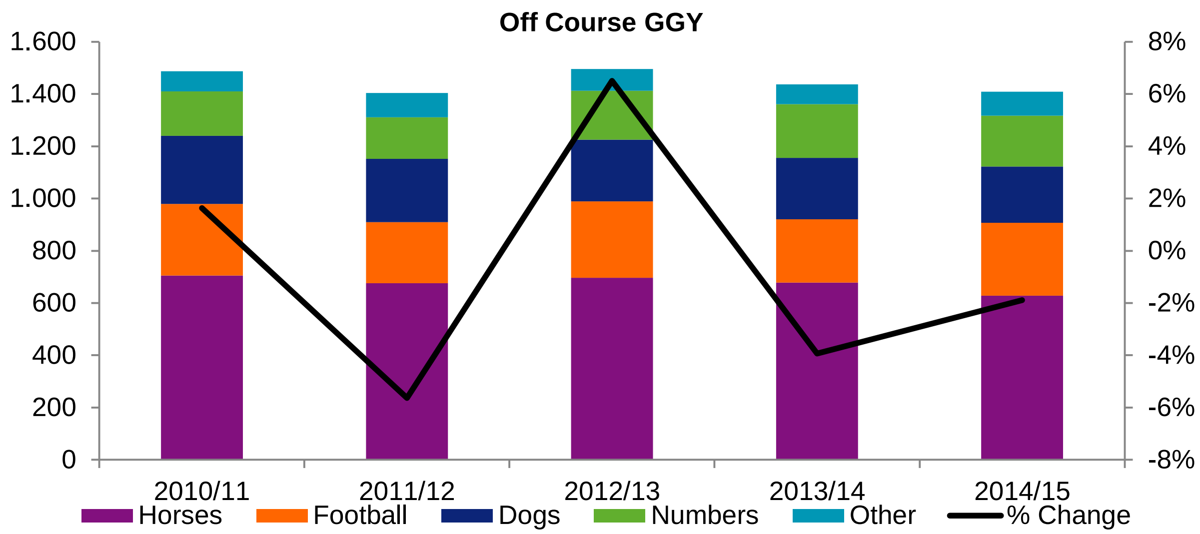
The figures in Table 5 for 2012 are based on licensing authority notifications. The figures from column 'at 31 Mar 2013' onwards are taken from each operator's most recent regulatory return.

Off-course betting

GGY from betting on football fluctuates according to whether or not there was a major tournament that year. The data tables for the chart can be found in the Excel version of Industry Statistics.

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 GGY (£m)

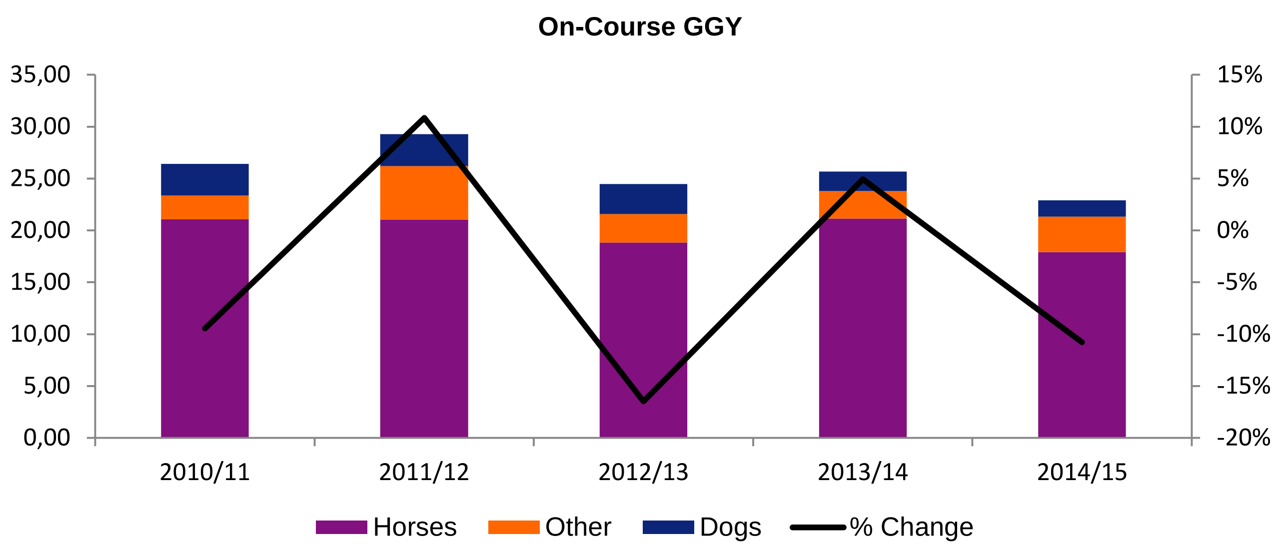


[7] Most recent return submitted before this date.

Betting

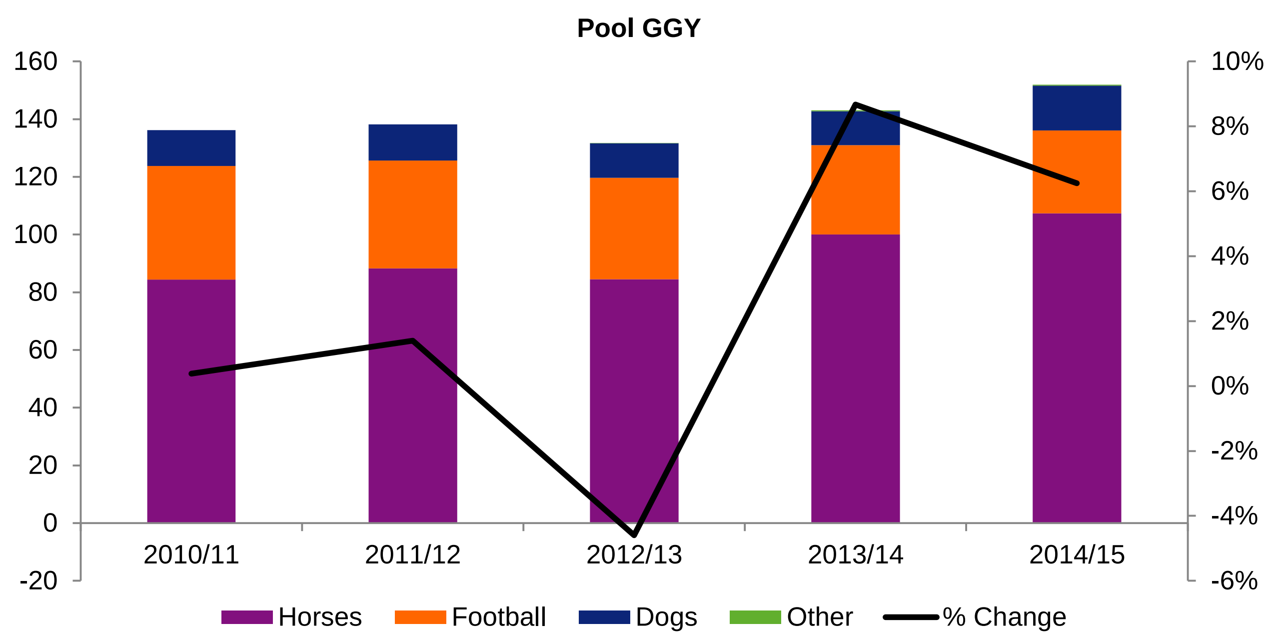
On-course betting

Figure 3: On-course betting GGY (£m)



Pool betting

Figure 4: Pool betting GGY[8] (£m)



The data tables for these charts can be found in the Excel version of Industry Statistics.

[8] GGY can be higher than turnover as the GGY may not be accrued in the same reporting period.

Betting

Gaming machines in betting shops

During the period April 2014-March 2015 the total number of gaming machines in betting shops (Table 6) 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 April 2014-March 2015, compared with 64% in April 2010-March 2011.

Table 6: Average[9] gaming machine numbers

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B2	32,832	33,294	33,299	34,492	34,552
B3	227	147	78	69	92
C	190	105	78	57	41
Total	**33,249**	**33,546**	**33,455**	**34,618**	**34,685**

Table 7: Gaming machine GGY (£m)

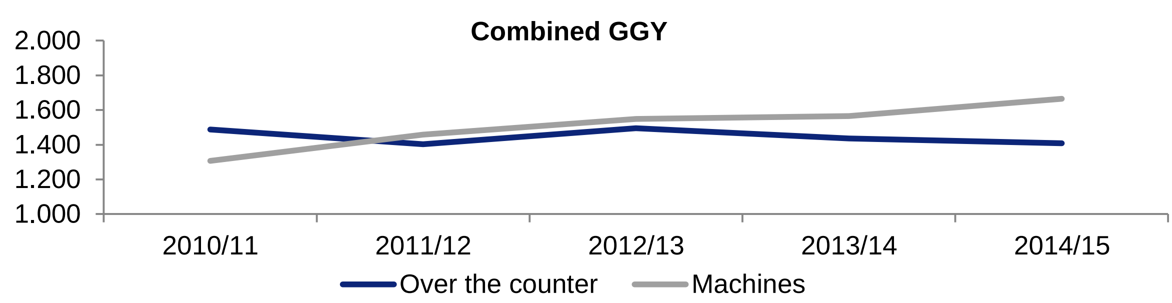
Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B2	1,302.35	1,455.95	1542.84	1564.69	1664.02
B3	2.07	1.75	1.61	0.94	0.97
C	0.61	0.23	0.15	0.14	0.07
Aggregated categories[10]	2.24	0.54	3.74	0.16	0.31
Total	**1,307.31**	**1,458.50**	**1,548.40**	**1,565.94**	**1,665.38**

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 6 and Table 7 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, which is available on our website.

Off-course combined GGY

Figure 5: Off-course betting sector breakdown of GGY (£m)



Across the five year reporting periods, over the counter GGY decreased by £78.4m whilst gaming machine GGY increased by £358m and now accounts for over 54% of the total (Figure 5).

[9] Gaming machine numbers fluctuate during the year and as such operators are required to provide their average number of machines.
[10] Where GGY figures have been provided but not broken down by machine category.

Betting

Self-exclusions recorded by operators

Table 8: Betting sector self-exclusions

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Mar 2014-Apr 2015
New self-exclusions	20,977	20,303	22,550	24,452	30,795
Known breaches of self-exclusion	10,509	11,071	14,850	19,583	20,427
Number of individuals who cancelled their self-exclusion after minimum exclusion period	2,774	2,720	3,761	4,741	6,262

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 breaches represents the number of separate incidents, rather than the number of individuals (Table 8).

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.

Gambling where individuals were unable to prove their age

Table 9: Betting sector underage challenges

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
Challenged upon entry but unable to prove age	565,510	523,483	588,198	580,804	517,247
Challenged when attempting to gamble but unable to prove age	90,384				
Challenged having gambled but unable to prove age		34,606	27,383	27,200	27,433

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 9).

Integrity in 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.

Betting

Referral

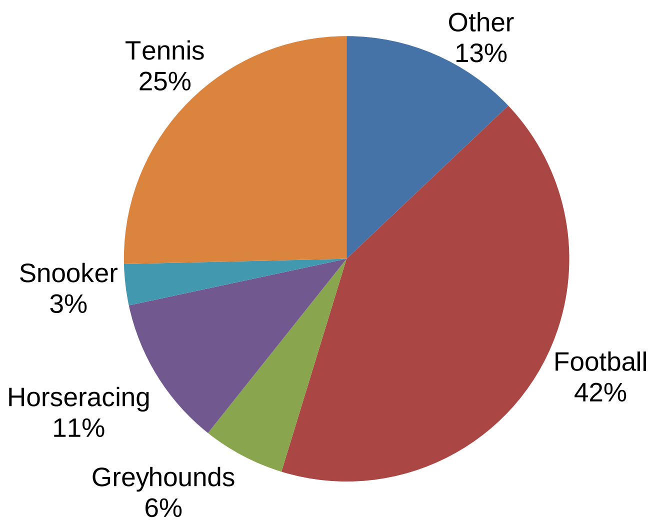
Due to the changes outlined above, the Commission is only in a position to publish data for the period April 2014 to March 2015.

Table 10: Reports notified to the Commission broken down by source (1 April 2014 – 31 March 2015)

Source	Apr 2014-Mar 2015
Betting operator	152
Sports governing body	26
Police	8
Media Report	4
Public - General	2
Foreign regulator	5
Others	4
Total	**201**

Table 10 shows the breakdown of potential betting integrity failures notified to the Commission split by source, with Figure 6 showing the corresponding proportionate split of referrals to the Commission by event.

Figure 6: Reports notified to the Commission broken down by event (1 April 2014 – 31 March 2015)



Of the cases received during this period, 8 remain open.

Betting

Closed cases

Table 11: Closed Sports Betting Intelligence Unit cases[11]

	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
Football	14	34	27
Other	14	12	16
Tennis	12	13	13
Greyhounds	2	5	6
Horseracing	4	7	8
Cricket	3	1	2
Total	**49**	**72**	**72**

Table 11 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 11 reflect this, with data including cases relating to both GB and non-GB events.

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

[11] The figures in Table 11 in part relate to reports received during this reporting period (as detailed in Table 10) but also include cases received during previous reporting periods. This is due to the fact that cases are not necessarily opened and closed within the same reporting period. In addition, 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.

Bingo

Bingo

Structure of the non-remote bingo industry

As of 30 September 2015, 201 operators held non-remote bingo licences. Table 12 details the premises figures for large operators in this sector.

The figures in Table 12 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 12: Number of premises by operator[12]

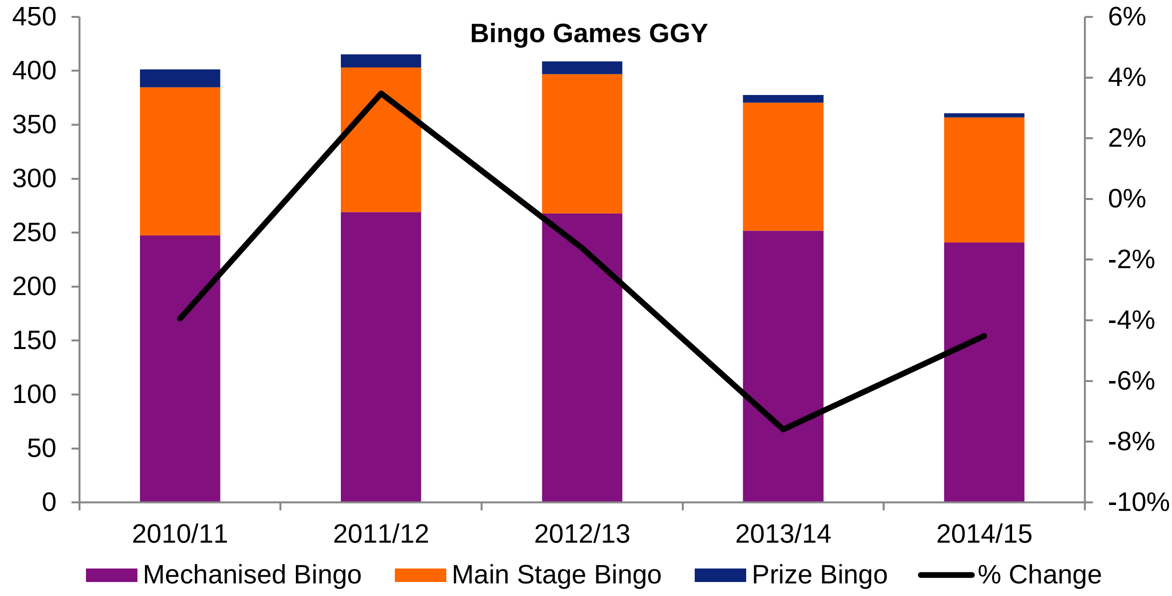
Commission licensed activity	at 31 Mar 2011	at 31 Mar 2012	at 31 Mar 2013	at 31 Mar 2014	at 30 Sep 2015[13]
Gala Leisure Limited	267[14]	143	137	135	135
Mecca Bingo Limited	103	97	98	97	91
Other operators	325	406	476	441	389
Total	**695**	**646**	**711**	**673**	**615**

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.

Bingo turnover and GGY

The data tables for these charts and for turnover can be found in the Excel version of Industry Statistics.

Figure 7: Bingo GGY £m (participation fees)



[12] At the time of publication it has been identified that a number of operators have been recording the number of licensed premises incorrectly in their 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 continue to review these returns and make sure any errors are rectified.

[13] Most recent return submitted before this date.

[14] 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.

Bingo

Gaming machines in bingo clubs

Table 13: Average gaming machine numbers

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B3	3,788	4,643	6,458	7,538	7,667
B4	240	195	185	151	124
C	14,840	16,413	21,227	31,583	42,646
D	5,022	17,804	19,453	11,236	4,720
Total	**23,890**	**39,054**	**47,322**	**50,509**	**55,157**

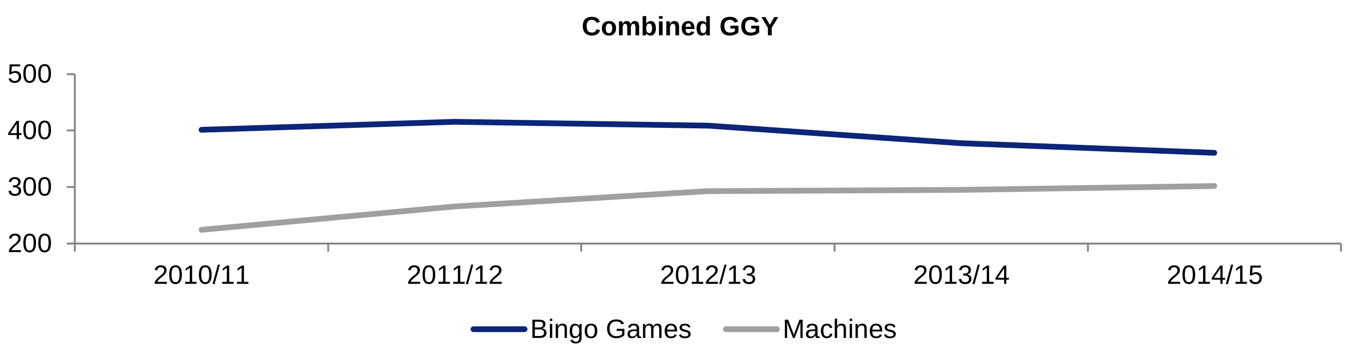
Table 14: Gaming machine GGY (£m)

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B3	58.08	76.32	136.54	156.19	158.94
B4	1.73	1.35	1.13	0.75	0.62
C	71.61	81.00	129.01	110.84	107.69
D	5.02	8.10	20.60	19.70	17.24
Aggregated categories[15]	87.74	98.47	5.23	7.27	17.19
Total	**224.18**	**265.26**	**292.50**	**294.75**	**301.69**

The make-up of gaming machines in bingo clubs has changed in recent years. The introduction and widespread use of electronic bingo terminals (EBTs)[16] by a number of providers accounts for much of the increase in category C 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.

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 14).

Figure 8: Bingo sector breakdown of GGY (£m)



[15] Where GGY figures have been provided but not broken down by machine category.
[16] 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.

Bingo

Self-exclusions recorded by operators

Table 15: Bingo sector self-exclusions

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
New self-exclusions	638	825	803	1,177	1,267
Known breaches of self-exclusion	31	38	30	62	93
Number of individuals who cancelled their self-exclusion after minimum exclusion period	171	243	280	385	423

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 15).

Gambling where individuals were unable to prove their age

Table 16: Bingo sector age challenges

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
Challenged upon entry but unable to prove age[17]	223	3	-	-	-
Challenged when attempting to gamble but unable to prove age	76	-	-	-	-
Challenged having gambled and unable to prove age		104	76	186	289

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’.

[17]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 where 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.

Casinos

Casinos

Casinos and the Act

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 31 March 2015 two large casinos had opened under the 2005 Act – Aspers (Stratford City) Ltd in Newham and Aspers (Milton Keynes) Ltd 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 competitions.

Two additional 2005 Act casinos opened later in 2015: the first small casino was opened by Grosvenor Casinos in Luton at the end of August, in premises previously licensed as a 1968 Act casino; and the large casino developed by Genting Casinos as part of Resorts World Birmingham at the NEC in Solihull was opened in late October.

Gaming Act 1968 casinos

At 31 March 2015, there were 186 Gaming Act 1968 ('1968 Act') casino premises licences available, comprising 146 casinos operating, 23 casinos licensed but subsequently closed and 17 licensed but not yet operating.

Structure of the non-remote casino industry

Table 17: Number of operating casinos

Organisation	at 31 Mar 2011	at 31 Mar 2012	at 31 Mar 2013	at 31 Mar 2014	at 31 Mar 2015
Rank Group (Grosvenor and 'G' Casinos)	37	36	38	63	63
Genting UK (Genting Casinos)	46	44	42	41	41
Gala Coral Group (Gala Casinos)	28	27	25	0	0
London Clubs International	11	10	11	9	9
Other operators	27	28	27	32	33
2005 Act Casinos		1	1	2	2
Total	**149**	**146**	**144**	**147**	**148**

There were 148 casinos in all operating at 31 March 2015. Two companies own the majority of casinos in the sector, namely Rank Group (Grosvenor Casinos and 'G' Casinos) with 63 casinos, and Genting UK (Genting Casinos/Clubs) with 41 casinos (Table 17).

Casinos

Casino attendance

Table 18: Casino attendance by region (m)

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015
Scotland	1.84	1.88	1.72	1.65	1.63
North	4.87	5.06	5.46	5.44	5.43
Midlands & Wales	4.01	4.14	4.03	3.69	3.80
South	2.96	3.04	3.03	3.41	3.50
London high end[18]	0.16	0.16	0.14	0.16	0.15
Other London	3.55	3.96	5.50	6.47	6.48
Total	**17.39**	**18.24**	**19.88**	**20.82**	**20.99**

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 6.48 million in April 2014-March 2015.

Average industry table numbers

Table 19: Average industry table numbers[19]

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015
Electronic Gaming	3,607	3,924	4,178	3,900	3,642
American Roulette	804	848	869	872	839
Blackjack	556	589	613	603	590
3 card poker	224	233	232	230	234
Punto Banco	102	114	136	162	158
Other	358	222	79	62	80
Casino stud poker	20	12	8	6	12
Dice	21	21	16	16	12
Total	**5,692**	**5,963**	**6,131**	**5,851**	**5,569**

The overall average industry table numbers have decreased by £123m (2%) over the five periods reported above. Casino stud poker has been in decline for a number of years and no longer features at many casinos. (Figure 9)

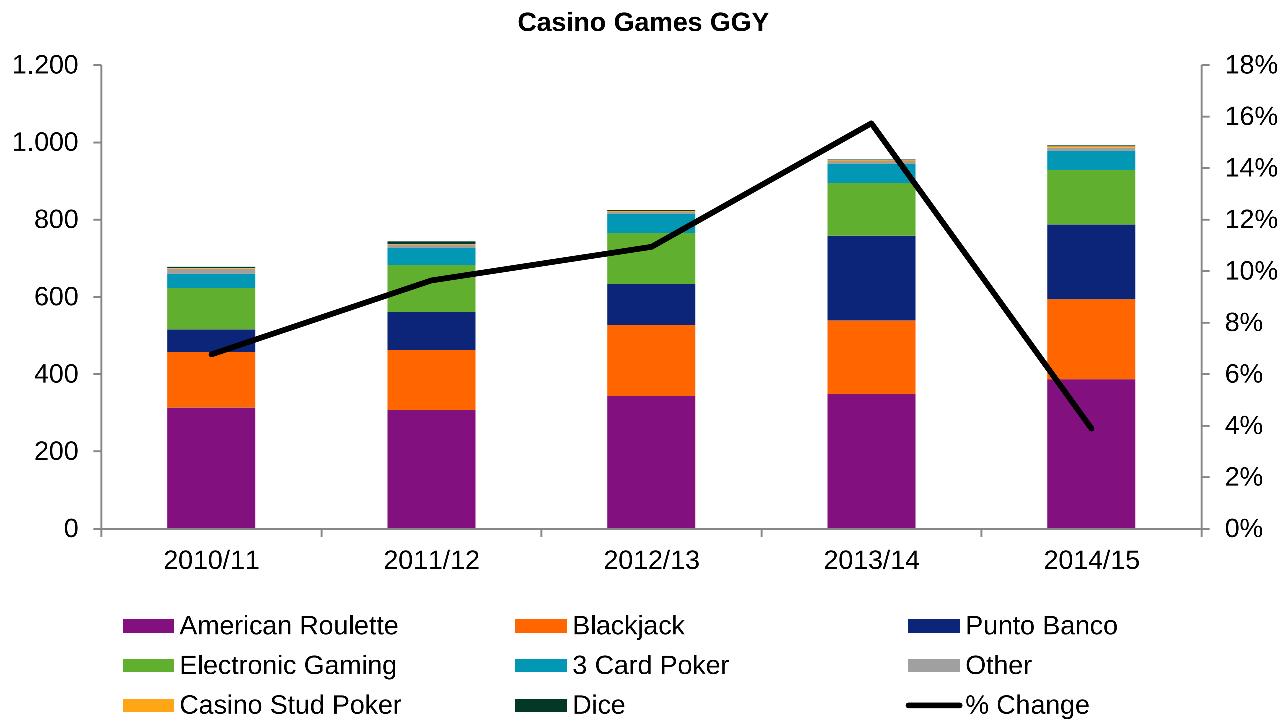
[18] Casinos referred to as London 'high end' comprise six casinos agreed with the industry, which have a distinctive pattern of low volume attendance and high value gaming.
[19] Electronic Gaming refers to player positions and not table numbers. Electronic gaming enables multiple players to participate in the same game of roulette, thus increasing player participation opportunities and reducing overheads.

Casinos

Drop and win

Casino drop can be found in the Excel version of Industry Statistics.

Figure 9: Casino win - GGY (£m)



The data tables for these charts can be found in the Excel version of Industry Statistics.

Gaming machines in casinos

Table 20: Average gaming machine numbers

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B1	2,603	2,788	2,675	2,676	2,645
B2	30	56	111	175	173
B3	4	11	9	14	4
Total	**2,637**	**2,855**	**2,795**	**2,866**	**2,822**

During the period April 2014-March 2015, the number of gaming machines in casinos accounted for 1.69% of the total number of machines across all gambling sectors.

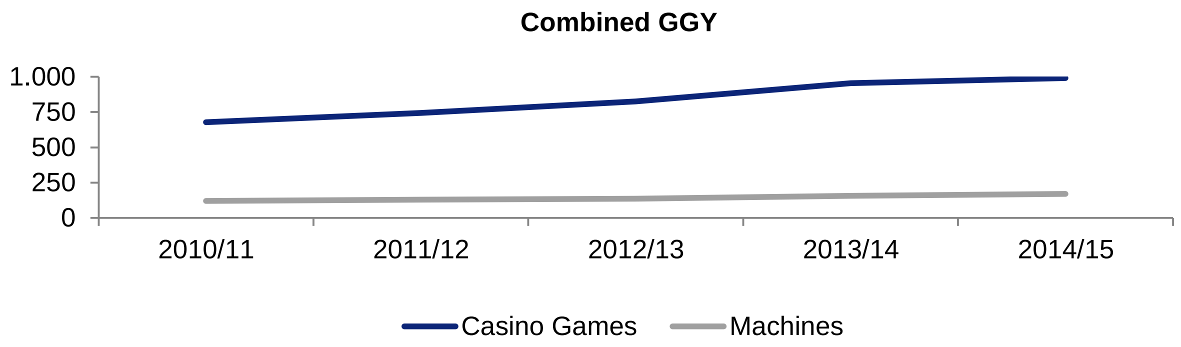
Casinos

Table 21: Gaming machine GGY (£m)

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015
B1	117.67	126.27	130.11	145.88	156.90
B2	1.26	2.50	5.71	9.56	11.72
B3	0.07	0.17	0.35	0.45	0.18
Aggregated categories[20]	0.00	0.00	0.00	0.00	0.00
Total	**119.00**	**128.95**	**136.18**	**155.89**	**168.80**

Overall casino gaming machine GGY (Table 21) increased year-on-year across the five reporting periods and by 42% since April 2010-March 2011. Gaming machine GGY in casinos accounted for 7% gaming machine GGY across all sectors.

Figure 10: Casino GGY (£m) revenue source yearly comparison



There is year-on-year growth across all the reporting periods for both casino revenue streams (Figure 10) with casino games accruing 85.5% of the total GGY.

Self-exclusions recorded by operators

Table 22: Casino sector self-exclusions

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015
New self-exclusions	6,684	7,434	7,680	7,658	7,566
Known breaches of self-exclusion	636	1,001	931	899	1,093
Number of individuals who cancelled their self-exclusion after minimum exclusion period	1,448	1,480	2,015	2,324	3,075

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 22).

[20] Where GGY figures have been provided but not broken down by machine category.

Casinos

Gambling where individuals were unable to prove their age

Table 23: Casino sector age challenges

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015
Challenged upon entry but unable to prove age	90	129	118	123	115
Challenged when attempting to gamble but unable to prove age	28	-	-	-	-
Challenged having gambled but unable to prove age	-	33	26	19	27

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’.

Arcades

Arcades

Structure of the arcade industry

As at 30 September 2015 there were 495 adult gaming centre (AGC) licences and 158 family entertainment centre (FEC) licences held by 532 operators.

Table 24: Number of licences

Commission licensed activity	at 31 Mar 2012	at 31 Mar 2013	at 31 Mar 2014	at 31 Mar 2015	at 30 Sept 2015
Adult gaming centre (AGC)	547	535	503	499	495
Family entertainment centre (FEC)	213	193	177	170	158

Table 25: Number of arcade premises

Commission licensed activity	at 31 Mar 2012	at 31 Mar 2013	at 31 Mar 2014	at 31 Mar 2015	at 30 Sept 2015
Adult gaming centre (AGC)	2,247	1,671	1,640	1,595	1475
Family entertainment centre (FEC)[21]	295	362	387	326	297

Up to March 2012, premises figures reported in Table 25 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.

Gaming machines in AGCs and FECs

The average number of gaming machines in AGCs has declined by 16% across the five-year period. In the period April 2014–March 2015, the number of gaming machines in AGCs (Table 25) accounted for 29.4% (39.59% in April 2010-March 2011) of the average number of machines across all regulated gambling sectors. 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 26: Average AGC machine numbers

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B3	8,698	8,695	9,103	9,659	9,386
B4	198	61	43	62	101
C	30,989	27,390	25,999	28,013	26,214
D	18,611	18,454	17,622	15,338	13,330
Total	**58,496**	**54,600**	**52,768**	**53,072**	**49,031**

Table 27: AGC machine GGY (£m)

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014–Mar 2015
B3	100.27	113.85	122.92	142.34	145.40
B4	0.47	0.32	0.29	0.19	0.23
C	86.02	86.02	95.28	103.48	101.95
D	24.77	20.76	26.66	24.73	22.46
Aggregated categories[22]	104.34	81.45	43.54	39.55	33.60
Total	**315.88**	**302.40**	**288.70**	**310.28**	**303.63**

[21] Will only include those FECs licensed by the Commission, excludes those requiring only a permit from local licensing authorities.
[22] Where GGY figures have been provided but not broken down by machine category.

Arcades

Table 28: Average licensed FEC machine numbers

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014 – Mar 2015
C	3,275	2,469	2,497	2,098	2,321
D	26,214	28,764	28,465	27,162	22,794
Total	**29,489**	**31,233**	**30,962**	**29,260**	**25,115**

Table 29: Licensed FEC GGY (£m)

Machine category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014 - Mar 2015
C	6.38	5.80	4.56	3.40	3.51
D	61.12	66.31	55.70	56.06	57.26
Aggregated categories[23]	8.62	6.55	8.95	7.71	7.25
Total	**76.12**	**78.66**	**69.21**	**67.18**	**68.03**

Self-exclusions recorded by operators

The number of new self-exclusions for AGCs has increased by 478 (18%) whilst at the same time the number for FECs has decreased by 43 (21%) across the period covered in Table 30. The number of breaches represents the number of separate incidents, rather than the number of individuals.

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

Table 30: Sector self-exclusions

	Licence type	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014 –Mar 2015
New self-exclusions	AGC	2,545	2,572	2,643	2,803	3,023
	FEC	202	139	134	133	159
Known breaches of self-exclusion	AGC	83	119	113	143	147
	FEC	51	43	12	16	11
Number of individuals who cancelled their self-exclusion	AGC	720	748	773	787	781
	FEC	64	42	51	48	47

Gambling where individuals were unable to prove their age

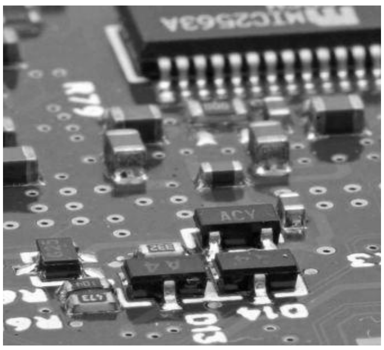
As of October 2011, the question ‘challenged when attempting to gamble but unable to prove age’ and the guidance issued in association with this question changed to ‘challenged having gambled and unable to prove age’ (Table 31).

Table 31: Arcade sector age challenges

	Licence type	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014–Mar 2015
Challenged upon entry but unable to prove age	AGC	15,472	18,829	19,003	22,941	26,843
	FEC[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	2,200
	FEC[25]		352	166	111	105

[23] Where GGY figures have been provided but not broken down by machine category.
[24] Children are allowed in FECs
[25] In over 18s areas only

Gaming machine manufacturers



Gaming machine manufacturers

Structure of the gaming machine manufacturing industry

As of 30 September 2015 there were 538 operators holding 585 Gaming Machine Technical (GMT) licences[26].

All data referenced in this section relates to regulatory returns submitted from operators holding a Gaming Machine Technical – Full (manufacturers) licence[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)
- Reflex Gaming
- Inspired Gaming.

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 April 2014-March 2015 figures, reported in Tables 32-33, should be treated as provisional. The next edition of Industry Statistics, scheduled for publication in June 2016, will contain a more up to date dataset for this period.

Table 32 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 32: Number of new machines sold

Machine category	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B1	327	176	240	125
B2	0	0	2,749	2,690
B3	1,564	1,482	1,775	833
B3A	360	733	187	235
B4	960	707	925	956
C	15,618	16,164	15,538	10,945
D	93	228	204	12
D (cash)	1,096	652	571	357
D (non-monetary)	664	488	290	298
No category	1,680	1,066	169	58
Total	**22,362**	**21,696**	**22,648**	**16,509**

[26] Includes manufacturer, supplier and software machine licences.
[27] For a full definition of the differences between the licensed activities, please visit our website.

Gaming machine manufacturers

Table 33 sets out the gross sales value derived for newly manufactured gaming machines as per Table 32 above.

Table 33: Gross value of sales from new machines sold (£m)

Machine category	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
B1	34.02	38.67	35.65	23.52
B2	0.00	0.00	5.98	5.85
B3	7.07	6.22	7.68	4.61
B3A	3.33	2.27	4.60	2.77
B4	2.77	2.90	2.47	2.21
C	1.38	1.10	1.71	2.09
D	2.81	1.41	1.31	1.57
D (cash)	0.91	1.35	0.46	0.63
D (non-monetary)	5.86	4.24	1.38	0.48
No category	0.14	0.58	0.70	0.03
Total	**58.29**	**58.74**	**61.94**	**43.77**

Remote betting, bingo and casino

Remote betting, bingo and casino

Remote gambling industry

Structure of the British licensed remote gambling industry

The data in this section relates to the remote gambling industry in Great Britain (GB) before and after the implementation of the Gambling (Licensing and Advertising) Act 2014, which came into force on 1 November 2014.

Up to October 2014 the Commission did not record information relating to gambling services supplied to GB customers by overseas operators. From 1 November 2014, remote figures include for the first time information from operators based overseas but supplying services to GB customers.

For information relating to GB based and non GB based activity under the new Act please see Excel version of the Industry Statistics[28].

Changes arising from the new legislation mean it is not appropriate to compare the most recent data relating to the remote market with earlier data. The implementation of the 2014 Act means the Commission now licenses the entire GB facing online gambling market, which includes operators that do not have any remote gambling equipment in Britain.

As of 30 September 2015 there were 719 remote gambling activity licences held by 427 operators.

Table 34: Breakdown of remote gambling activities licensed by the Commission

	Regulated under the Gambling Act 2005			Regulated under Gambling (Licensing and Advertising) Act 2014.	
Remote activity	at 31 March 2012	at 31 March 2013	at 31 March 2014	at 31 March 2015	at 30 Sept 2015
Gambling Software[29]	93	97	90	212	233
Casino	23	26	27	178	176
General Betting Standard - Real Event	56	50	43	103	95
Pool Betting	47	45	46	71	79
Bingo	10	10	9	49	52
General Betting Standard - Virtual Event	15	16	12	38	37
General Betting Limited (Telephone only)	37	29	22	24	24
Betting Intermediary	10	10	10	19	17
Betting Intermediary - Trading Rooms Only	14	12	10	7	6
Grand Total	**305**	**295**	**269**	**701**	**719**

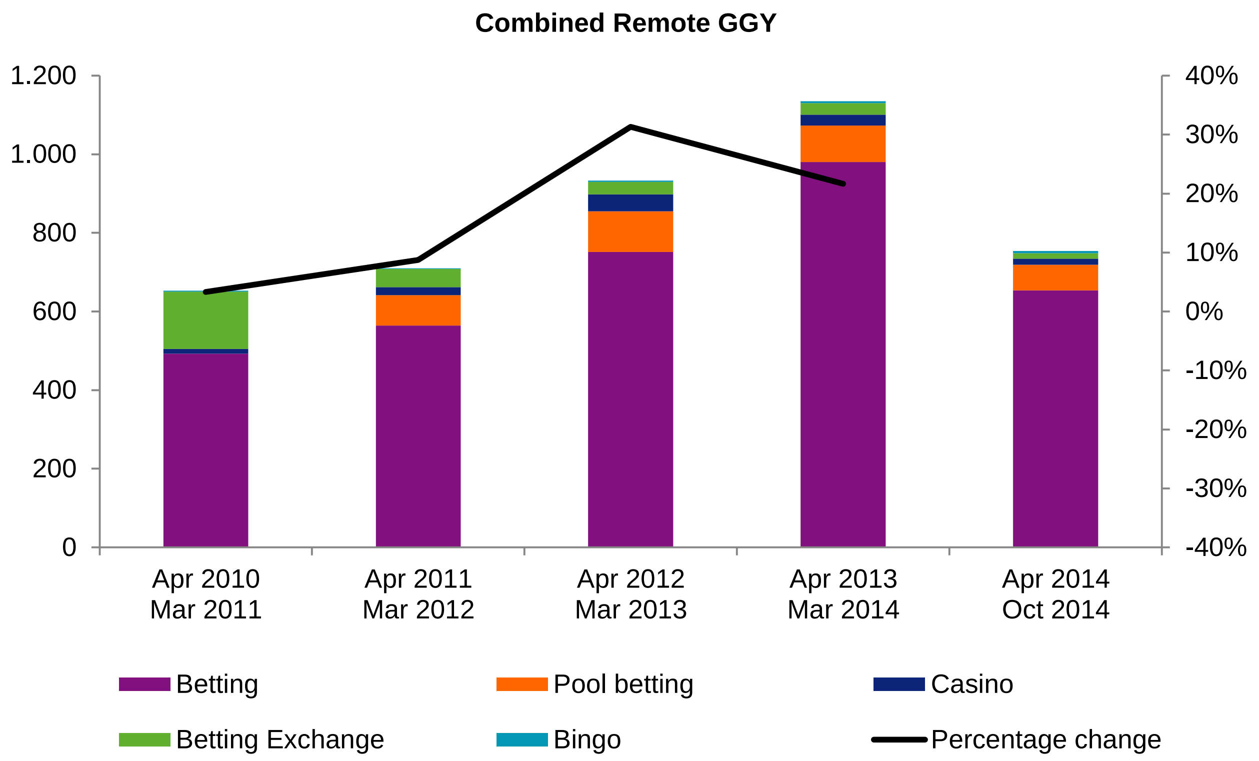
[28] The data represented accounts for five months under the new Act and seven months under the previous Act.
[29] Includes both remote and non-remote licences.

Remote betting, bingo and casino

Regulated under the Gambling Act 2005 (pre-November 2014)

Remote GGY

Figure 11: GGY from remote gambling activities £m (including betting exchanges)



The percentage change line in Figure 11 above does not extend beyond April 2013-March 2015 and should not be used for direct comparison. The April to October 2014 data represented in the chart reflects licensed operators before the implementation of the new Act and does not represent a whole year and cannot be treated as continuous with earlier data.

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[30].

Please note that unlike third party data on this market, the Commission collects and reports on data about customer participation on the product being played in reliance on the licence held. An example would include customers playing casino side-games whilst on a bingo website, in this case the (casino content) side-games would be reported to the Commission as casino GGY, whilst any bingo play would be reported separately as bingo GGY.

The data tables for these charts can be found in the Excel version of Industry Statistics.

[30] The ‘Other’ category captures all betting activity outside of those listed in the table. This includes sporting activity and non-sporting activity. The percentage change line in Figure 12 above does not extend beyond April 2013-March 2014 and should not be used for direct comparison.

Remote betting, bingo and casino

Figure 12: Remote betting sector GGY breakdown (£m)[31]

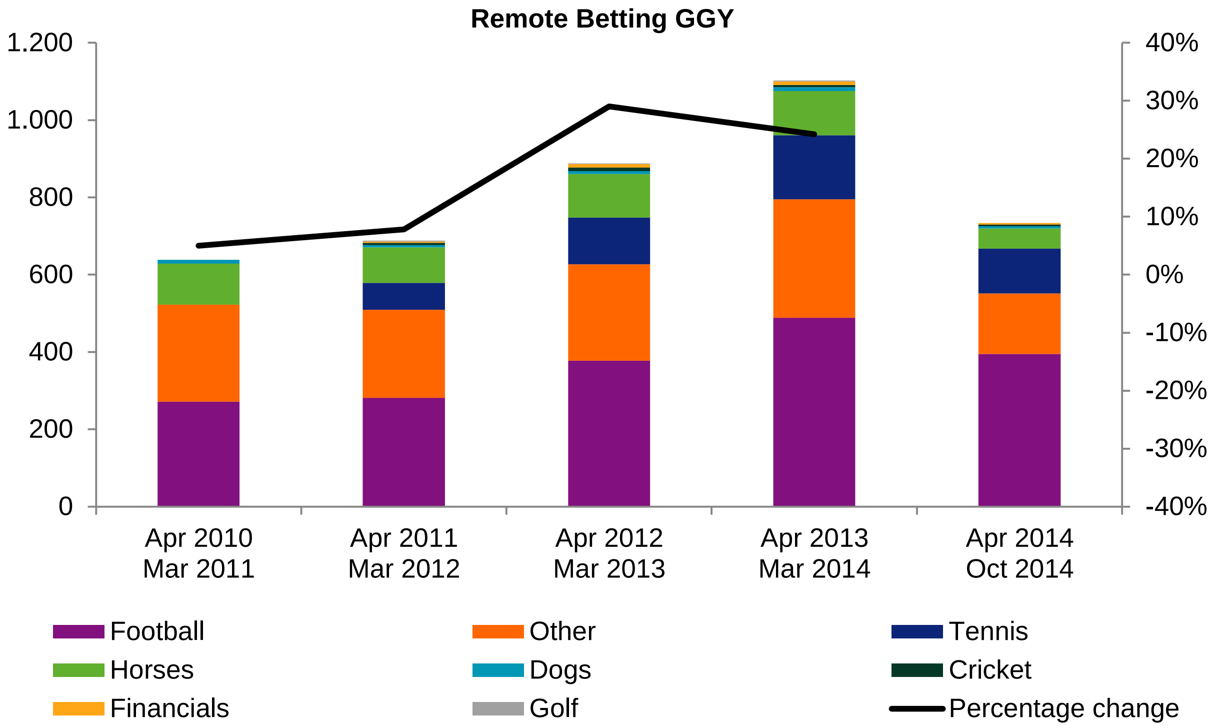
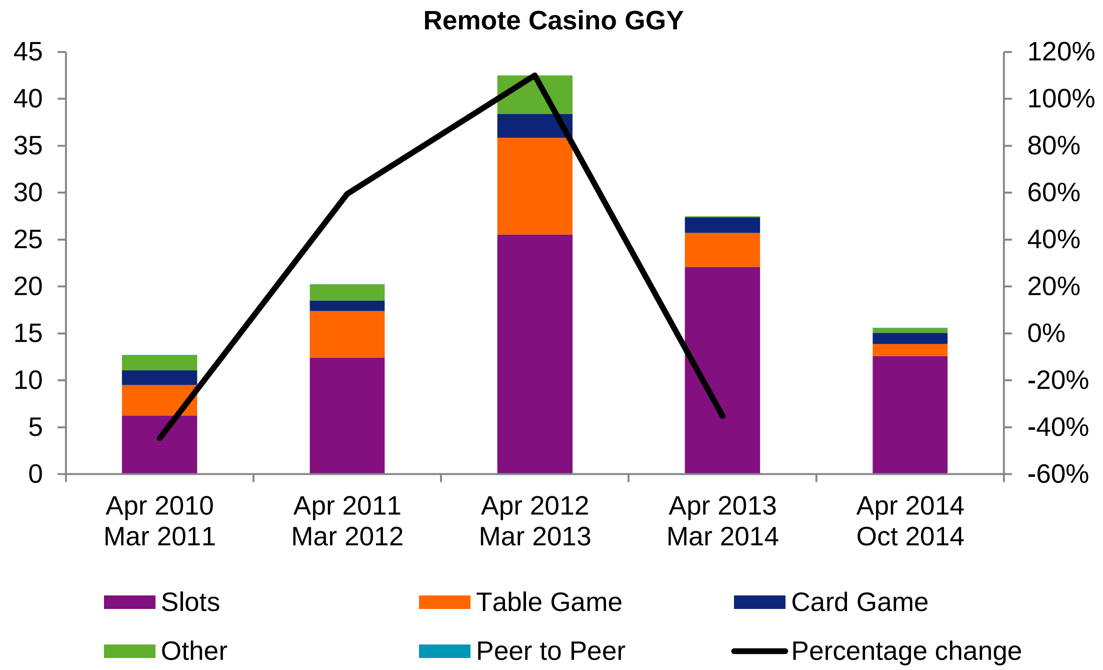


Figure 13: Remote casino sector GGY breakdown (£m)



The percentage change line in Figure 12 and 13 above does not extend beyond April 2013-March 2015 and should not be used for direct comparison. The April to October 2014 data represented in the chart reflects licensed operators before the implementation of the new Act and does not represent a whole year and cannot be treated as continuous with earlier data.

The data tables for these charts, including turnover can be found in the Excel version of Industry Statistics.

[31] The percentage change line in Figure 12-13 do not extend beyond April 2013-March 2014 and should not be used for direct comparison.

Remote betting, bingo and casino

Regulated under the Gambling (Licensing and Advertising) Act 2014 (post November 2014)

Remote GGY[32]

Since 1st November 2014 the Commission has been collecting GGY derived from revenue share agreements between licensed operators, as shown in Table 35, 36 and 37 below[33].

To mitigate against the risk of double counting this revenue, the Commission requires operators to report only their relevant portion of the revenue share. Business to business operators are not required to submit the wagered or payout amount of a product meaning this information is only reported to the Commission once, by the business to customer operators. Further details of this arrangement can be seen in the remote regulatory returns consultation responses document, especially Annex A.

Due to the complex nature of large remote businesses the Commission is working with operators to ensure the reported data are consistent with the requirements set out in the regulatory returns. In addition a triangulation exercise has been undertaken with HMRC data.

The dataset does not yet breakdown the revenue share for betting operators into individual sports, instead is recorded against "Revenue share". Figures for the Total regulated market (i.e. the GB market plus overseas customers) share can be found in the Excel version of the Industry Statistics.

Table 35: GGY from remote gambling activities (£m) for GB customers only.

November 2014 to 31 March 2015			
	Proprietary GGY	Revenue Share GGY	Total GGY
Betting	317.83	154.91	472.74
Betting Exchange	55.66	-	55.66
Bingo	38.36	44.26	82.62
Casino	359.88	474.37	834.25
Pool Betting	6.29	-	6.26
Total	**777.98**	**673.54**	**1,451.51**

Table 36: GGY from remote betting gambling activities (£m) for GB customers only.

November 2014 to 31 March 2015			
GGY	Proprietary GGY	Revenue Share GGY	Total GGY
Cricket	4.79	-	4.79
Dogs	9.26	-	9.26
Financials	3.10	-	3.10
Football	168.44	-	168.44
Golf	3.63	-	3.63
Horses	127.86	-	127.86
Tennis	25.31	-	25.31
Other	37.35	-	37.35
Revenue share		154.91	154.91
Total	**379.74**	**154.91**	**534.65**

[32] No charts have been produced for post 1 November 2014 data recognising that there is insufficient data to have a series, but will be produced in future editions of the Industry Statistics publication.
[33] The date range for this does not cover the football World Cup which took place during the summer of 2014.

Remote betting, bingo and casino

Table 37: GGY from remote casino gambling activities (£m) for GB customers only.

November 2014 to 31 March 2015			
	Proprietary GGY	Revenue Share GGY	Total GGY
Card games	20.52	47.18	67.70
Peer to Peer	30.50	6.17	36.67
Slots	253.93	278.60	532.54
Table games	46.45	93.88	140.34
Other	8.47	48.53	57.01
Total	**359.88**	**474.37**	**834.25**

Customer accounts

Customers will often have accounts with more than one operator and therefore the data in Table 38 relates to accounts rather than the individuals holding those accounts.

Table 38: Customer account information[34]

Regulated under the Gambling Act 2005						Regulated under Gambling (Licensing and Advertising) Act 2014
Commission licensed activity	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Oct 2014	Nov 2014-Mar 2015
Active customer (m)	3.50	3.99	4.66	4.88	5.59	15.62[35]
New player registrations (m)	3.31	3.83	4.62	5.68	6.24	10.25
Funds held in customer accounts £m)	265.95	147.13	185.09	205.15	228.29	463.35

The value of funds held in customer accounts decreased in April 2011-March 2012 (Table 38), although most of this decrease is attributable to Betfair moving offshore during that time.

Customers gambling on betting exchanges tend to maintain a significant balance 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.

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.

[34] Active customers are those that have been used by customers in the last 12 months. New registrants' include new individual customer registrations that occurred during the period but may not have gambled.
[35] The figure represented reflects five months data under the Gambling (Licensing and Advertising) Act.

Remote betting, bingo and casino

Table 39: Remote sector self-exclusions[36]

	Regulated under the Gambling Act 2005					Regulated under the Gambling (Licensing and Advertising) Act 2014
	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Oct 2014	Nov 2014-Mar 2015
New self-exclusions[37]	33,953	34,321	37,746	69,405	94,326	185,459
Known breaches of self-exclusion	2,533	2,317	2,031	2,123	1,189	13,096
Number of individuals who cancelled their self-	1,581	1,508	1,984	3,799	2,296	16,884

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 40: Remote sector age challenges[38]

	Gambling Act 2005					Gambling (Licensing and Advertising) Act 2014
	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Oct 2014	Nov 2014-Mar 2015
Challenged when attempting to gamble but unable to prove age	74	-	-	-	-	-
Challenged having gambled but unable to prove age	-	188	432	493	404	16,162

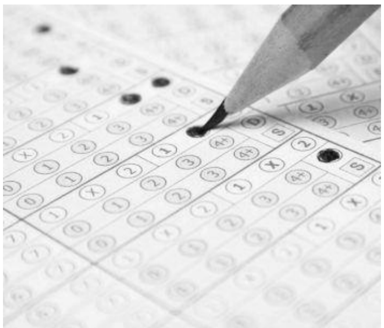
Gambling software

For a full split of revenues, involving shared income[39], please see the Excel version of Industry Statistics. These figures are based on annual returns. Following the update on Gambling Software Licences, which came into effect on 31 March 2015, we expect the figures to change significantly once we receive the first set of data from new operators (after April 2016).

Table 41: Gambling software income

	Sales £m				Total revenue £m			
	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
Game	3.85	3.68	13.35	16.61	18.73	18.89	31.20	31.68
Platform	65.18	62.91	70.98	31.63	86.03	82.5	95.56	51.59
Other	1.72	0.65	9.72	4.76	2.45	2.97	14.13	9.51
Total	**70.75**	**67.24**	**94.05**	**53.00**	**107.2**	**104.37**	**140.88**	**92.78**

[36] The increase in figures post November 2014 is attributable to the Gambling (Licensing and Advertising Act 2014) which came into force. These data should not be treated as a continuous dataset.
[37] The increase is attributable to the introduction of automated self-exclusion process by an operator and the increased number of operators' post November 2014 when the Gambling (Licensing and Advertising) Act 2014 came into force.
[38] The increase in figures post November 2014 is attributable to the Gambling (Licensing and Advertising Act 2014) which came into force on 1 November 2014.
[39] This includes the income generated from gambling software provided to organisations, for which royalties are received.



Large society lotteries

Large society lotteries

Structure of the large society lottery sector

In order to offer society lotteries lawfully, the Act requires that a society holds either a registration with its 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 30 September 2015, there were 484 non-commercial society lottery operators holding 823 lottery licences (as set out in Table 42). 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 30 September 2015, there were 38 ELMs holding 53 licences.

Table 42: Lottery licences

Licence	Type	at 31 Mar 2011	at 31 Mar 2012	at 31 Mar 2013	at 31 Mar 2014	at 31 Mar 2015	at 30 Sep 2015
Society lottery	Non-remote	445	484	467	458	466	476
	Remote[40]	182	233	148	141	147	154
	Ancillary remote	0	0	119	151	186	193
ELM	Non-remote	25	32	29	30	35	33
	Remote	16	19	17	18	18	20

[40] 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.

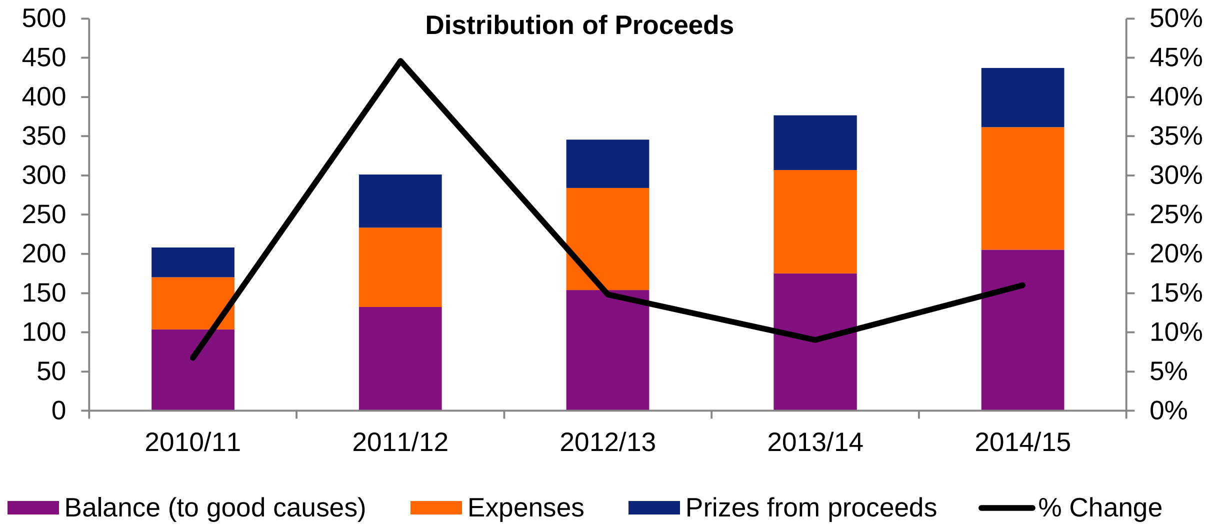
Large society lotteries

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 47% between April 2010 – March 2011 and April 2014-March 2015. Prizes from proceeds decreased slightly from 18% to 17% and expenses also increased from 32% to 36% during the same period.

Figure 14: 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.

The National Lottery

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.

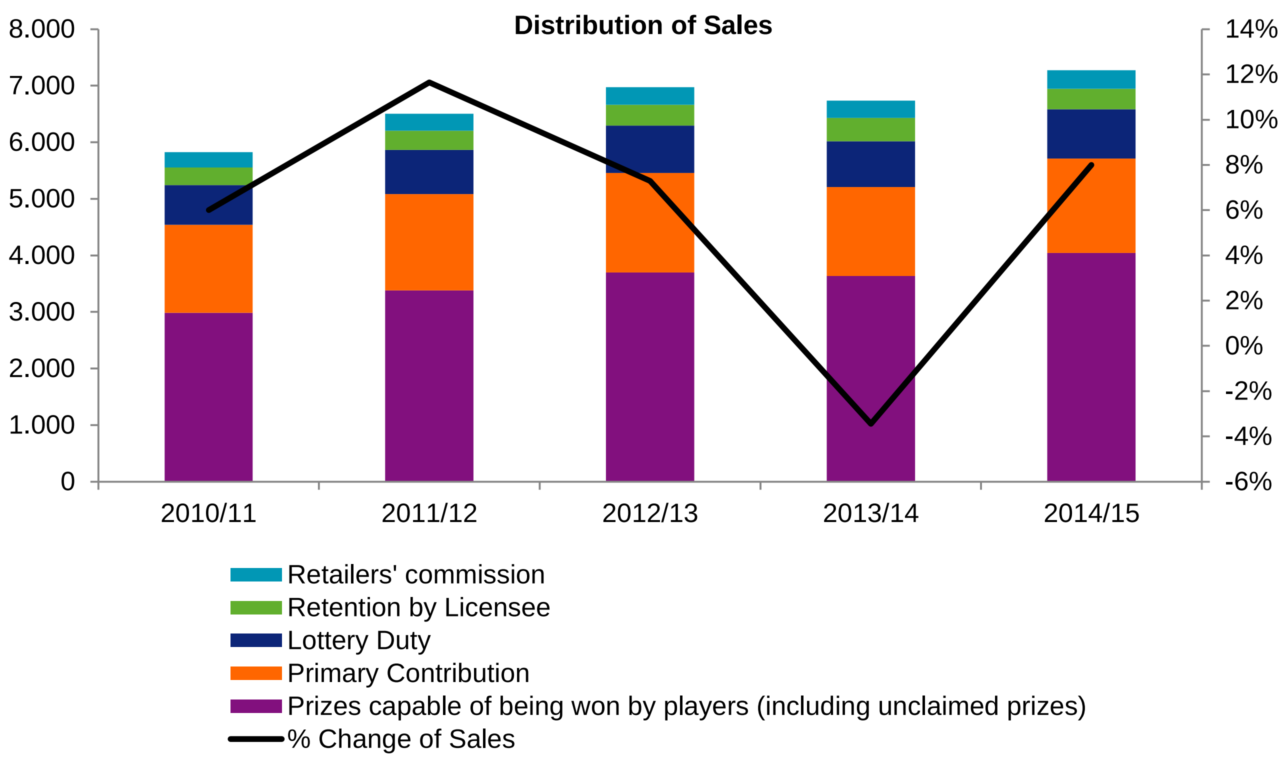
Since its launch in November 1994, the National Lottery has raised over £33bn for good causes that include sports, arts and heritage, as well as health and education and the environment. National Lottery funding contributed almost £2.2bn towards the costs of staging the London 2012 Olympic and Paralympics 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 £7.3bn at April 2014-March 2015. Primary contributions[41] (to good causes) have increased from £1.55bn to £1.66bn during the same period. Prizes and the amount retained by the licensee[42] have also increased during this time.

Figure 15: Breakdown of National Lottery proceeds (£m)[43]



The data tables for this chart, including further data points can be found in the Excel version of Industry Statistics and previous annual reports on the National Lottery website.

[41] Amount payable on sales figures less adjustments such as the National Lottery Promotions Unit (NLPU).
[42] The amount retained by the licensee can include terminal and data communication costs, expenditure and gross profit.
[43] Retailers commission and Lottery duty figures track the sales figures.

Additional data about the Commission’s activities

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 April 2014-March 2015.

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.

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

At the end of the period covered by the last Industry Statistics (September 2014), we completely overhauled the ways in which we capture and record details of major regulatory cases. Because of this sizeable change in methodology, we are unable to provide major regulatory cases for this publication.

Further details of major regulatory cases will be published in future editions of Industry Statistics.

Unlicensed enforcement activity

The number of unlicensed enforcement activity cases completed by the Commission during the period April 2010-March 2011 and March 2014-April 2015 is detailed in the table below.

Table 43: Unlicensed enforcement activity

	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	Apr 2014-Mar 2015
Cases closed	33	26	13	34	24

Personal licence revocations

Table 44 shows personal licence revocations between April 2010-March 2011 and April 2014-March 2015. 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. These revocations are technical revocations rather than representing regulatory sanctions.

Table 44: Personal licence revocations

Category	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015
Revoked following PLM check	-	-	926	749	606
Other reasons	23	27	11	23	9
Total	**23**	**27**	**937**	**772**	**615**

Please see the Commission's sanctions register for a detailed breakdown of revocations for reasons other than the PLM check.

Compliance assessments

Table 45 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.

Additional data about the Commission's activities

Table 45: Compliance assessments

Sector	Apr 2010-Mar 2011	Apr 2011-Mar 2012	Apr 2012-Mar 2013	Apr 2013-Mar 2014	April 2014-Mar 2015	
					Terrestrial	Online (remote)
Arcades	526	332	130	267	235	0
Betting	1,249	925	391	536	531	115
Bingo	328	323	193	157	131	12
Business to business	120	89	50	106	190	0
Casino	352	244	186	92	86	18
Lottery	82	126	76	111	166	3
Total	**2,657**	**2,039**	**1,026**	**1,269**	**1,339**	**148**

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.

Licensed activity

Table 46 shows the breakdown of activity between April 2014 - March 2015 for new licences granted and for existing licences which have been surrendered, revoked, forfeited or lapsed.

Table 46: New licensed activity[44] and licensed activity surrendered, revoked, forfeited or lapsed

Licensed activity (Apr 2014 - Mar 2015)	New licensed activity		Licensed activity surrendered		Licensed activity revoked/forfeited/ lapsed	
	Non-remote	Remote	Non-remote	Remote	Non-remote	Remote
New casino	0	162	0	9	0	1
Existing casino	0	n/a	2	n/a	0	0
Bingo	11	60	13	1	0	0
General betting (standard)	19	75	51	10	2	1
General betting (limited)	27	6	24	1	2	n/a
General betting (telephone only)	n/a	0	n/a	0	n/a	0
Pool betting	2	41	0	8	0	1
Betting intermediary	3	18	0	6	1	2
Gaming machine general: AGC	32	n/a	31	n/a	0	n/a
Gaming machine general: FEC	7	n/a	12	n/a	0	n/a
Gaming machine technical: full	6	3	11	1	1	0
Gaming machine technical: supplier	21	0	25	0	3	0
Gaming machine technical: software	4	4	4	0	1	0
Gambling software	12	120	8	3	0	0
External lottery manager	5	4	3	4	0	0
Society lottery	38	26	23	8	1	1
Total	**187**	**519**	**207**	**51**	**11**	**6**

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

[44] Excluding personal licences.

Appendices

Appendices

Appendix 1 - Regulatory returns analysis (methodology)

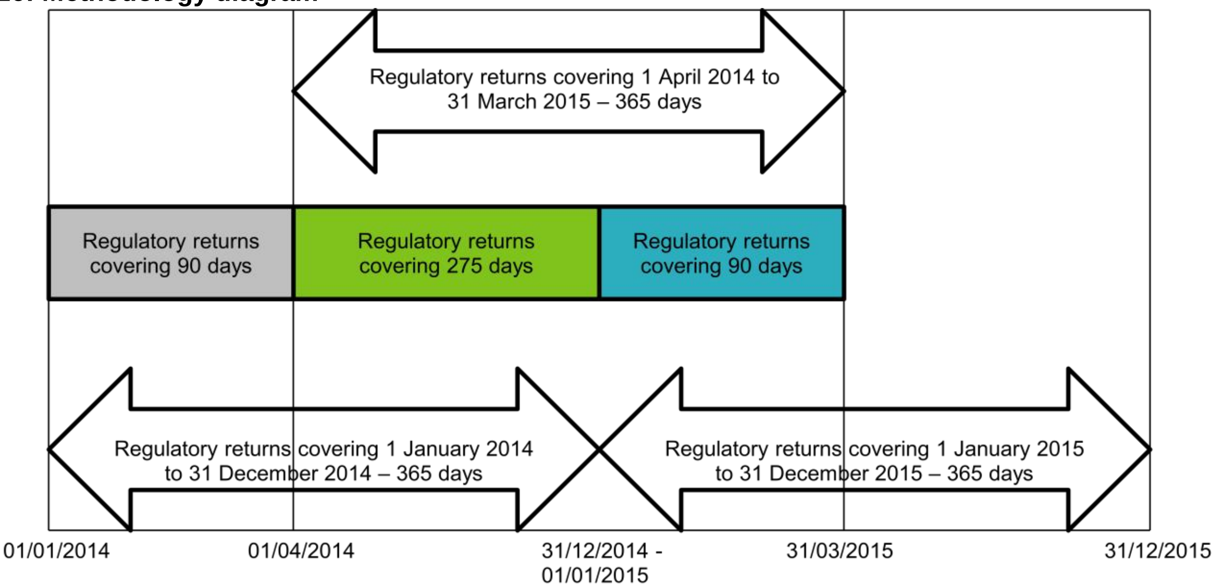
Regulatory returns must be completed annually by most operators and quarterly by some operators (the large betting operators, casino and remote operators). The date on which returns fall due depends on the date chosen by the particular licence holder, for example, it may coincide with an organisation's 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 April 2014 to 31 March 2015. The diagram below indicates how we make that estimate[45].

When providing figures covering a particular period, the Commission includes all returns that fall wholly or partially within that reporting period. For each operator that submits an annual return, a weighted average is calculated based on the number of days each of the two returns relates to the reporting period. No such calculation is required for quarterly submitted returns as they fall wholly within the reporting period. Where an operator's annual returns cover only part of the period in question the figure has been adjusted to produce an estimate for the full year. For example, an operator with a reporting year running to 31 December 2014 will not yet have provided data for the latter part of the full reporting year (1 January 2015 – 31 March 2015).

Figure 16: 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.

[45] 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.

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 latest drop and win 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.

Proprietary GGY – GGY retained by remote operators which is not subject to a revenue share agreement (i.e. is completely retained by the individual operator).

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, 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.

Revenue share GGY – revenue share is defined as GGY which is subject to a contractual arrangement to be shared between two or more Commission licensed operators.

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).

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.

Appendices

Appendix 3 - Gaming machine categorisation

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

Table 47: Gaming machine categorisation

Machine category	Maximum stake (from Jan 2014)	Maximum prize (from Jan 2014)
A	Unlimited	Unlimited
B1	£5	£10,000[46]
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).

[46] With the option of a maximum £20,000 linked progressive jackpot on a premises basis only

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

Copies of this document are available in alternative formats on request.

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