06/07/08/09

Industry statistics 2008/09

GAMBLING
COMMISSION

Contents

Gambling industry data

The data

- Detailed statistics relating to the gambling industry in Great Britain have been collated from a range of sources including the Gambling Commission (the Commission), gambling industry trade bodies, the Department for Culture, Media and Sport (DCMS) and Her Majesty's Revenue & Customs (HMRC).
- A substantial amount of the information in this paper is taken from data in the regulatory returns that all licensed gambling operators must submit on either an annual or quarterly basis. Statistics taken from the regulatory returns are provisional and have been adjusted to relate to the full calendar year 2008 (see Appendix 1 for details).
- The information contained in this document covers betting, bingo, casinos, gaming machines and arcades, lotteries and remote gambling. It does not cover the National Lottery (except as a comparison) or spread betting.
- Statistics and information relating to the Commission and its activities are contained in the annual report for the financial year 1 April 2008 to 31 March 2009, available on the Commission website.

The gambling industry

The gambling industry in Great Britain is substantial, with a turnover of over £84 billion in 2006/07. Gross gambling yield (ie the amount retained by operators after the payment of winnings but before the deduction of the costs of the operation) was estimated at £9.9 billion in 2006/07. 25% of this £9.9 billion was generated by the National Lottery and most of the remainder by those industries which are regulated by the Commission.[1]

Gamblers

A prevalence survey commissioned by the Commission sampled over 9,000 adults between 2006 and 2007 and was published in September 2007. It showed that 68% of the population (about 32 million adults) had participated in some form of gambling activity within the past year. Excluding people who had only gambled on the National Lottery in the last year, 48% of the population (about 23 million adults) had participated in another form of gambling in the past year.

The most popular gambling activities in Britain in 2007 were The National Lottery Draw (57% had participated in the past year), scratchcards (20%), betting on horse races (17%) and playing slot machines (14%). Only a small proportion of people took part in the new forms of gambling available in Great Britain: for example 6% of people used the internet to gamble (3% did online gaming like playing poker or casino games and 4% placed bets with a bookmaker) (See under Remote Gambling for current statistics on remote participation).

A further prevalence survey is planned for 2009/10 and will be published in the autumn 2010.

Problem gambling

The 2007 prevalence survey found that the rate of problem gambling in the adult population was about 0.6%[2] (about 284,000 adults). This is the same percentage of the population as identified in an earlier survey published in 1999.

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1 HM Revenue & Customs Statistical Bulletins
2 To tolerance limits 0.5%-0.8%

Betting

Structure of the betting industry

The betting industry is made up of both on course and off course betting operators. As at 31 March 2009, the Commission had issued 714 on course general betting licences and 720 off course general betting licences.

This industry is dominated by five operators that account for approximately 7,262 (over 80%) of all betting shops. The approximate numbers of betting shops (excluding Northern Ireland) operated by each of these operators is as follows:

as at 31 March 2009	
Organisation	**Total betting shops**[3]
Ladbrokes	2,080
William Hill	2,228
Coral	1,630
Betfred	808
Tote	516
Other[4]	approx 1,600
Total	**8,862**

Information taken from regulatory returns 1 January 2008 to 31 December 2008

Number of employees (FTE[5]) **43,133**
Number of employees (headcount) **57,613**

Off course returns

	Turnover £ million	Gross profit £ million	Number of bets million
Dogs	1,646.8	312.2	246.8
Football	980.0	221.8	150.7
Horses	6,401.6	891.6	748.4
Number	874.6	168.3	321.1
Other	913.9	123.2	77.3
Total	**10,816.9**	**1,717.1**	**1,544.3**

On course returns

Number of on course operator days **43,376**

	Turnover £ million	Gross profit £ million
Dogs	72.90	7.30
Horses	759.30	29.10
Other	12.60	1.00
Total	**844.80**	**37.40**

[3] Figures for the major five bookmakers obtained from the companies concerned
[4] Figures taken from Local Authority returns to the Commission
[5] Full time equivalent

Pool betting returns

	Turnover £ million	Gross profit £ million
Dogs	53.9	14.7
Football	59.3	46.6
Horses	368.1	81.6
Other	1	0.2
Total	**482.4**	**143.1**

Gross profit from gaming machines in betting shops **£1,138 million**

The number of self exclusions recorded by operators

Self exclusions	**10,281**
Known breaches of self exclusion	**3,362**
Number of individuals who cancelled their self exclusion after minimum exclusion period	**964**

The numbers of people who have self excluded and the numbers 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 and thus been counted more than once. The number of breaches represents the numbers of separate incidents, rather than the number of individuals.

Under-age gambling

There were 85,097 recorded incidents when someone under the age of 18 entered a betting premises and 22,202 recorded incidents when someone under age gambled on a betting premises before their age was ascertained.

Integrity in Betting

48 cases of suspicious betting activity were reported to the Commission between 1 September 2007 and 31 March 2009. Of these, 31 were reported by betting operators under licence condition 15.1 with 17 coming from other sources, for example sports governing bodies, the media or the public.

In 22 of these cases the grounds for suspicion have not been substantiated following an initial consideration. A breakdown of the activities involved in those cases is provided below. Of the remainder, 15 cases have been passed to the relevant sports governing body for investigation and there are 11 active investigations in which the Commission is further involved.

Suspicious betting activity 1 September 2007 to 31 March 2009	
Activity	**Cases closed**
Football	7
Horseracing	5
Snooker	2
Bowls	1
Greyhound racing	2
Darts	1
Golf	1
Tennis	1
Non-sport	2
Total	**22**

Bingo

Structure of the bingo industry

There were 216[6] bingo operators licensed by the Commission at 31 March 2009 operating 641 clubs, against 222[4] operators with 675 clubs at 31 March 2008. Gala Bingo and Mecca Bingo between them own over 40% of the clubs.

as at 31 March 2009		
Organisation	**Total bingo clubs**	**% of total**
Buckingham Bingo	11	1.7
Carlton Clubs	14	2.2
Gala Bingo	158	24.6
Mecca Bingo	102	15.9
Riva Bingo	13	2.0
Top Ten Bingo	36	5.6
Independent/small operators	307	48.0
Total	**641**	**100.0**

Information taken from regulatory returns 1 January 2008 to 31 December 2008

Number of employees (FTE[7]) **14,337**
Number of employees (headcount) **16,926**

1 January 2008 to 31 December 2008	Gross gaming sales £ million	Participation fees £ million
Main Stage Bingo Games	958.9	171.4
Mechanised Cash Bingo	541.5	265.4
National Game	63.0	10.6
Prize Bingo	139.1	75.6
Total	**1,702.5**	**523.0**

1 April to 31 March	Gross gaming sales £ million[4]	% change from previous year
2004/2005	1,783	23.4
2005/2006	1,826	2.4
2006/2007	1,820	(0.3)
2007/2008	1,620	(11.0)
2008/2009	1,694[8]	4.6

Gross profit from gaming machines in bingo clubs **£214 million**

The number of self exclusions recorded by operators
Self exclusions **272**
Known breaches of self exclusion **25**
Number of individuals who cancelled their self exclusion after minimum exclusion period **65**

The numbers of people who have self excluded and the numbers 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 and thus been counted more than once. The number of breaches represents the numbers of separate incidents, rather than the number of individuals.

Under-age gambling

There were 8 recorded incidents when someone under the age of 18 gambled on a bingo premises before their age was ascertained.

[6] These figures do not cover remote bingo (see section on Remote Gambling)
[7] Full time equivalent
[8] Figures provided for the fiscal year to provide comparative with previously published data

Casinos

Structure of the casino industry

There were 143 casinos and two card clubs operating at 31 March 2009. The casino industry remains dominated by three companies, namely the Gala Group with 27 casinos, Grosvenor Casinos (part of Rank plc) with 32 casinos and Genting Casinos Ltd with 45 casinos.

A total of 16 new casinos are proposed under the Gambling Act 2005 (2005 Act). Three operators hold licences that would enable them to open one of these new casinos but to date none are operating. This is due to the fact that a bidding process has to be undertaken with the relevant local authority before any such casino can be established (see below for details).

Casino ownership by operator

as at 31 March 2009	
Organisation	**Total casinos**
Gala	27
Rank (Grosvenor and 'G' Casinos)	32
London Clubs International	11
A & S Leisure	6
Genting Casinos	45
Aspinalls	4
Blue Chip	3
Clockfair	2
Individual operators including 2 card clubs	15
Total	**145**

Information taken from regulatory returns 1 January 2008 to 31 December 2008

Number of employees (FTE[9]) **12,843**
Number of employees (headcount) **14,204**

Casino attendance

There were over 16.6 million visits to casinos in Great Britain between April 2008 and March 2009, an increase of 400,000 over the previous year.

	Scotland	North	Midlands & Wales	South	Provinces sub total	London	Total
	millions						
2006/07	1.2	4.7	3.2	3.0	12.1	3.0	**15.1**
2007/08	1.3	4.8	3.7	3.1	12.9	3.3	**16.2**
2008/09	1.5	4.7	3.9	2.9	13.0	3.6	**16.6**

Gross profit from gaming machines in casinos **£120.5 million**

The number of self exclusions recorded by operators
Self exclusions **6,049**
Known breaches of self exclusion **268**
Number of individuals who cancelled their self exclusion after minimum exclusion period **733**

The numbers of people who have self excluded and the numbers 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 and thus been counted more than once. The number of breaches represents the numbers of separate incidents, rather than the number of individuals.

[9] Full time equivalent

Casinos

Under-age gambling

There were 44 recorded incidents when someone under the age of 18 entered a casino and 11 recorded incidents when someone under age gambled in a casino before their age was ascertained.

Total Drop and Win by year[10] and by region

Both the total drop and the total house win have increased slightly during the year.

Region	Casinos operating	Year 1 April to 31 March	Drop £	House win £	House win %
Scotland	**14**	**2008/2009**	**211,792,008**	**34,087,154**	**16.1**
	14	2007/2008	201,271,517	32,426,333	16.1
North	**38**	**2008/2009**	**668,766,748**	**95,713,253**	**14.3**
	38	2007/2008	671,739,380	102,232,209	15.2
Midlands and Wales	**38**	**2008/2009**	**588,138,782**	**84,134,951**	**14.3**
	36	2007/2008	592,057,557	87,286,152	14.7
South	**28**	**2008/2009**	**415,281,530**	**66,111,971**	**15.9**
	30	2007/2008	469,086,278	73,967,495	15.8
Provinces sub total	**118**	**2008/2009**	**1,883,979,068**	**280,047,329**	**14.9**
	118	2007/2008	1,934,154,732	295,912,189	15.3
London	**25**	**2008/2009**	**2,645,252,219**	**398,568,996**	**15.1**
	26	2007/2008	2,497,666,864	360,646,655	14.4
Great Britain total	**143**	**2008/2009**	**4,529,231,287**	**678,616,325**	**15.0**
	144	2007/2008	4,431,821,596	656,558,844	14.8

The drop figures above do not include monies wagered on the Casino Stud Poker progressive jackpot

Total drop by game

1 April to 31 March	Electronic Roulette £million	American Roulette £million	Blackjack £ million	Trial and other games £ million	Casino Stud Poker £million	Craps £million	Punto Banco £million	Three Card Poker £million	Total £million
2007/08	702.2	2,195.8	794.3	19.1	25.6	21.1	368.3	219.8	**4,346.5**
2008/09	718.3	2,248.9	775.1	36.6	14.8	17.9	367.3	202.8	**4,428.0**

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

Location of casinos

2005 Act casinos

Under Section 175(4) of the Gambling Act 2005 the areas determined as potential locations for casinos under the 2005 Gambling Act are as follows.

One large casino can be permitted to be licensed in each of the following areas:

- Great Yarmouth
- Kingston-upon-Hull
- Leeds
- Middlesbrough
- Milton Keynes
- Newham
- Solihull
- Southampton.

One small casino can be permitted to be licensed in each of the following areas:

- Bath and North East Somerset
- Dumfries and Galloway
- East Lindsey
- Luton
- Scarborough
- Swansea
- Torbay
- Wolverhampton.

1968 Act casinos - licences not operational as at 31 March 2009

- 14 licensed but closed.
- 31 licensed but not operating (of which 4 are extensions to; or replacements for, existing licences)
- 1 awaiting outcome of licensing application.
- 5 appealing or considering an appeal against refusal of licence application by local authority.

The position at 31 March 2009 was that if all outstanding applications were successful and the licences became operational there would be a theoretical maximum of 192 1968 Act casinos including six card clubs.

1968 Act casino permitted areas

Areas in which the licensing of premises for casino gaming is permitted showing the number of licensed clubs operating on 31 March 2008 and 31 March 2009.

Licensing Area	31 March 2008	31 March 2009	Licensing Area	31 March 2008	31 March 2009
England					
Birkenhead	1	1	Northampton	2	4
Birmingham	7	7	Nottingham	4	5
Blackpool	3	3	Plymouth	2	2
Bolton	2	2	Portsmouth & Southsea	3	3
Bournemouth	2	2	Ramsgate	1	1
Bradford	2	2	Reading	2	2
Brighton	3	3	Ryde	0	0
Bristol	5	3	Salford	2	2
Coventry	3	3	Sandown/Shanklin	0	0
Derby	2	2	Scarborough	1	1
Dudley	1	1	Sheffield	3	3
Great Yarmouth	3	3	Southampton	3	3
Hove	1	1	Southend-on-sea	3	3
Huddersfield	1	1	Southport	1	1
Kingston-upon-Hull	2	2	Stockport	2	2
Leeds	4	4	Stoke-on-Trent	2	2
Leicester	3	3	Sunderland	1	1
Liverpool	3	3	Teesside	1	1
Luton	3	3	Torbay (Torquay)	1	1
Lytham St Annes	0	0	Walsall	1	1
Manchester	6	6	Warley	0	0
Margate	2	2	West Bromwich	1	1
Newcastle-upon-Tyne	3	3	Wolverhampton	2	2
Wales			**London**	26	25
Cardiff	3	3			
Swansea	2	2			
Scotland					
Aberdeen	3	4			
Dundee	1	1			
Edinburgh	4	4			
Glasgow	5	5			
Total number of operating casinos				**144**	**145**

Gaming machines including arcades

Structure of the industry

		as at 31 March 2009	as at 31 March 2008
1968 Act	Section 27 certificate holders[11]	367	439
2005 Act	Machine manufacturers	76	93
	Machine suppliers	224	146
	Adult Gaming Centre (AGC)	632	601
	Family Entertainment Centre (FEC)	319	336
Total		**1,618**	**1,615**

Category of machine	Previously classed as:	Maximum stakes and prizes			
		Stake to 31 May 2009	**Prize to 31 May 2009**	**Stake from 1 June 2009**	**Prize from 1 June 2009**
A	jackpot machines	unlimited	unlimited	unlimited	unlimited
B1	jackpot machines	£2	£4,000	£2	£4,000
B2	fixed odds betting terminals (FOBTs)	£100	£500	£100	£500
B3	jackpot machines	£1	£500	£1	£500
B4	jackpot machines	£1	£250	£1	£250
C	amusement with prizes machines	50p	£35	£1	£70
D	amusement with prizes machines	10p if prize contains cash 30p if prize is wholly non cash	£5 cash or £8 non cash or mix of up to £8 in total with up to £5 cash	10p if prize contains cash 30p if prize is wholly non cash	£5 cash or £8 non cash or mix of up to £8 in total with up to £5 cash
D Pusher	new category	-	-	10p	£8 cash or £15 non cash or mix of up to £15 in total with up to £8 cash
D Crane grab	new category	-	-	£1	£50 non cash only

It is estimated by the British Amusement Catering Trade Association (BACTA) that there were over 248,000 gaming machines available to the public at 31 March 2009.

Machines publicly available at 31 March 2009	A	B1	B2	B3	B4	C	D
'000s	0	2.5	27.5	11.8	15.0	121.0	71.0
Annual change %	-	+24	+1.9	-1.7	-11.8	-7.6	-1.6

Adult gaming centres (AGC) and family entertainment centres (FEC)

The four main operators running adult gaming centres and family entertainment centres are:

- Nobles
- Shipley Leisure
- Talarius
- Agora

Gaming machine manufacturers

The primary business of machine manufacturers is the design and manufacture of new game concepts for machines in cat B-D, including cranes and pushers. Major manufacturers include:

- Barcrest / IGT/Cyberview
- Bell Fruit (Danoptra)
- Astra Novomatic
- Inspired Group (Leisure Link)
- Global Draw (Scientific Games)

[11] Section 27 certificate holders must apply for an operating licence under the 2005 Act when their certificate expires

Gaming machines including arcades

Gaming machine suppliers

The primary business of machine suppliers is the supply and maintenance of gaming machines on behalf of the operator, usually on a rental basis. Major suppliers include:

- Crown Leisure
- Gamestec (Danoptra)
- Inspired Group (Leisure Link)
- Sceptre Leisure

Information taken from regulatory returns 1 January 2008 to 31 December 2008

	AGC	FEC
Number of employees (FTE[12])	10,321	4,935
Number of employees (headcount)	19,396	5,733
Number of casual workers[13]	min 1,154 max 3,376	min 1,064 max 2,911

Gross profit from gaming machines	AGC	FEC
	£397.4 million	**£92.1 million**

The number of self exclusions recorded by operators	AGC	FEC
Self exclusions	**2,254**	**201**
Known breaches of self exclusion	**132**	**9**
Number of individuals who cancelled their self exclusion after minimum exclusion period	**513**	**67**

The numbers of people who have self excluded and the numbers 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 and thus been counted more than once. The number of breaches represents the numbers of separate incidents, rather than the number of individuals.

Under-age gambling

There were 4,304 recorded incidents when someone under the age of 18 entered an AGC. Children are permitted to enter FECs.

There were 313 recorded incidents when someone under 18 years of age gambled in an AGC before their age was ascertained, and 157 recorded incidents when someone under 18 years of age gambled on prohibited machines in an FEC before their age was ascertained.

Permits

The Commission issued 2 single machine permits under section 250 of the 2005 Act between 1 April 2008 and 31 March 2009. It is Commission policy to issue such permits to allow for “one off” isolated transactions involving the disposal of gaming machines by persons not normally in the trade. It is not intended that these permits should be issued on a regular or continuing basis to a person or business involved in the frequent sale, supply or maintenance of gaming machines.

[12] Full time equivalent
[13] Work is seasonal, particularly in seaside towns

Lotteries

Structure of the industry

The total number of societies licensed by the Commission to carry out lotteries totalled 542 at 31 March 2009 against 562 at 31 March 2008. The term society covers such bodies as charities, sporting clubs and cultural bodies. Such organisations may employ an external lottery manager (ELM) to run all or part of their lotteries. The total number of ELMs licensed by the Commission dropped from 46 at 31 March 2008 to 38 at 31 March 2009.

Information taken from regulatory returns 1 January 2008 to 31 December 2008

ELM

Number of employees (FTE[14])	**669**
Number of employees (headcount)	**861**

Under-age gambling

There were five recorded incidents by ELMs when someone under 16 years of age gambled in a lottery before their age was ascertained.

Lottery proceeds, expenses and prizes taken from lottery returns

1 April to 31 March	Hotspot Lotteries *	Non-Hotspot Lotteries	Proceeds (ticket sales)	Expenses held		Prizes		Balance	
			£ million	£ million	% of proceeds	£ million	% of proceeds	£ million	% of proceeds
2004/05	54,669	7,419	141.1	36.2	25.7	29.9	21.2	75.0	53
2005/06	52,555	7,567	138.7	35.3	25	29.7	21	73.7	53
2006/07	13,806	8,422	163.8	40.3	25	33.0	20	90.5	55
2007/08		9,462	169.9	39.6	23.3	29.8	17.5	100.5	59.1
2008/09		10,076	174.6	48.1	27.5	33.7	19.3	93.2	53.4

* 'Hotspot' lotteries ceased to exist in 2007/08.

[14] Full time equivalent

Remote

Structure of the remote gambling industry

The number of remote gambling operators licensed by the Commission rose slightly from 300 to 328 during the year, with the majority of these still relating to remote betting, consisting of betting exchanges, pool betting and general betting.

Breakdown of types of remote gambling licences issued by the Commission

General betting	72	Casino	20
Society lottery	50	Betting intermediary	19
Gambling software	49	Gaming machines technical – (full, supplier and software)	17
Pool betting	42	External lottery managers	10
General betting (telephone)	40	Bingo	9

The remote gambling industry in Great Britain is made up primarily as follows:

- many of the large and familiar high street bookmakers (see under the betting industry)
- large remote-only operators including Betfair and Bet365
- smaller betting operators that operate remote gambling facilities themselves
- smaller betting operators that have their remote operations hosted by more experienced operators
- fantasy football style remote pool betting operators
- smaller bingo and casino operators
- society lotteries that sell lottery tickets online or by telephone
- businesses supplying gambling software to gambling operators.

The majority of gambling sites accessible to British citizens are regulated overseas. In many cases an operator is licensed by the Commission for remote betting but (for fiscal and other operational reasons) its remote casino and poker operations are licensed overseas. The main European overseas jurisdictions regulating remote gambling are Alderney, Gibraltar, the Isle of Man and Malta.

Information taken from regulatory returns 1 January 2008 to 31 December 2008

Remote betting, bingo and casino

Number of employees (FTE[15])	**7,800**[16]

Self exclusion

Number of self exclusions	**45,277**
Known breaches/attempted breaches of self exclusion[17]	**6,807**
Number of individuals who cancelled their self exclusion after minimum exclusion period	**1,678**

The numbers of people who have self excluded and the numbers 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 and thus been counted more than once. The number of breaches represents the numbers of separate incidents, rather than the number of individuals.

[15] Full time equivalent
[16] Some online companies have included all their employees rather than just those employed in connection with the licensed activity
[17] The majority of this figure includes attempts to gamble that were successfully blocked

Under-age gambling

There were 144 recorded incidents when someone under the age of 18 attempted to gamble online. This figure includes attempts to gamble that were, in the majority of cases, successfully blocked by the operator.

Information on customer accounts	million
Customer accounts (for Commission licensed facilities)	16
Active customer accounts[18]	6.2
New player registrations	4.9
Funds held in customer accounts	£257

Gross gambling yield for remote betting, bingo and casino **£896 million**[19]

Participation in remote gambling (taken from ICM omnibus survey)

ICM Research carry out an omnibus survey that provides information on participation in remote forms of gambling. The data is published each quarter, based on an updated sample of 8,000 interviews over the previous year.

- Over the year to March 2009 (ie an average of figures for June 2008, September 2008, December 2008 and March 2009), 9.9% of the 8,000 adults surveyed said they had participated in at least one form of remote gambling (through a computer, mobile phone or interactive/digital TV) in the previous month. This compares with the 2008 calendar year figure of 9.7%, the 2007 calendar year figure of 8.8% and the 2006 calendar year figure of 7.2%. 90.0% of respondents said they had not participated in any form of remote gambling.
- Those participating in remote gambling remain more likely to be male than female, and are more likely to be aged 18-44.
- The growth in participation in remote gambling is explained largely by increased online participation in the National Lottery. If those only playing National Lottery games remotely are excluded, 5.6% of respondents had participated in remote gambling in the year to March 2009, compared with 5.6% in 2008, 5.2% in 2007 and 5.1% in 2006. Overall, in the year to March 2009, 7.5% of respondents said they had gambled remotely on tickets for the National Lottery draw in the previous month (either only or in addition to other types of gambling activity).
- Remote gambling via a computer, laptop or handheld device was most popular (8.2% of all respondents), followed by gambling via mobile phone (2.8%) and interactive/digital TV (2.1%).

[18] Active accounts that have been active during the previous 12 months
[19] Two larger sized betting operators relocated all or part of their operations offshore during 2008

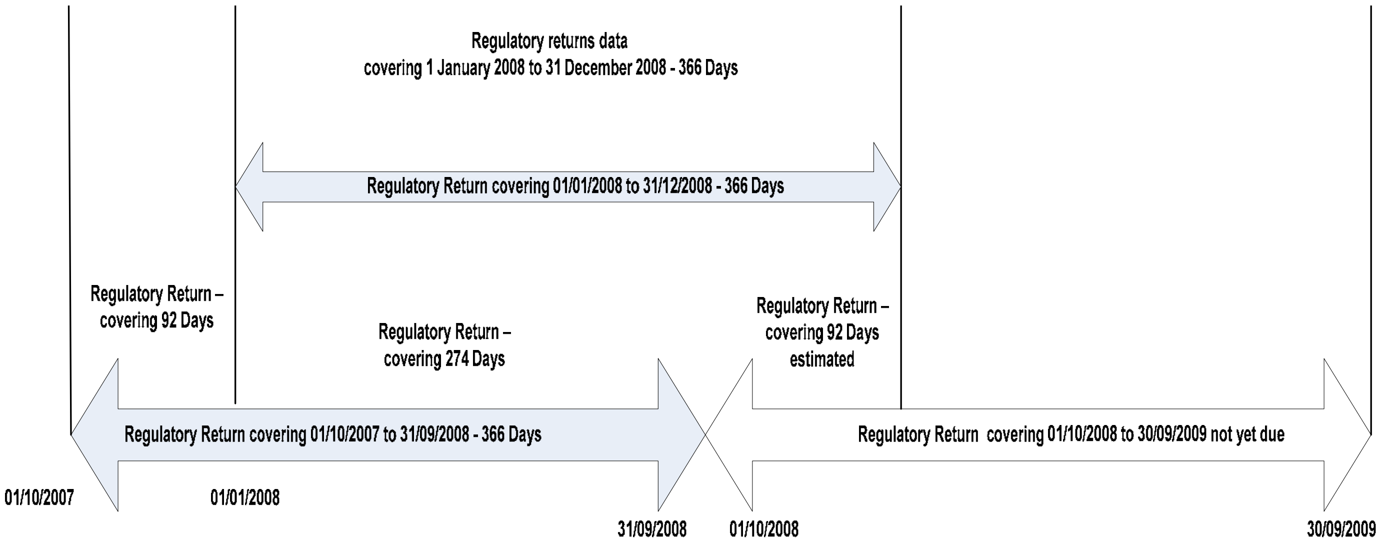
Appendix 1

Regulatory returns analysis

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

- Regulatory 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 scratchcard being sold.

When analysing data covering a particular period the Commission includes all returns that fall wholly or partially within that reporting period. Where the return covers only part of the period in question, the data has been adjusted to produce an estimate for the full year. For example, an operator with a reporting year running to 1 October will not yet have provided data for the full calendar year 2008: in this case the annual figures on the return to 1 October 2008 have been taken as a proxy for the full calendar year. The data provided is therefore provisional.



Appendix 2

Useful contacts

Organisation	Address	Website and email
Association of British Bookmakers (ABB)	Norris House 4 Norris Street London, SW1Y 4RJ	www.abb.uk.com mail@abb.uk.com
Betting Exchange Trade Association (BETA)	PO Box 34467 London W6 9WS	corporate@betfair.com www.betfair.com
Bingo Association	Lexham House 75 High Street North Dunstable Bedfordshire LU6 1JF	www.bingo-association.co.uk enquiries@bingo-association.co.uk
British Amusement Catering Trades Association (BACTA)	Alders House 133 Aldersgate Street London EC1A 4JA	www.bacta.org.uk info@bacta.org.uk
British Association of Leisure Parks, Piers and Attractions	Suite 12 37 Tanner Street London SE1 3LF	www.bboa.co.uk
British Beer & Pub Association	Market Towers 1 Nine Elms Lane London SW8 5NQ	www.beerandpub.com
British Casino Association	38 Grosvenor Gardens London SW1W 0EB	www.britishcasinoassociation.org.uk enquiries@britishcasinoassociation.org.uk
British Holiday & Home Parks Association Ltd	Chichester House 6 Pullman Court Great Western Road Gloucester GL1 3ND	www.bhhpa.org.uk enquiries@bhhpa.org.uk
British Horseracing Authority	151 Shaftesbury Avenue London WC2H 8AL	www.britishhorseracing.com enquiries@britishhorseracing.com
Business in Sport and Leisure (BISL)	17a Chartfield Avenue Putney London SW15 6DX	www.bisl.org info@bisl.org
Casino Machines Manufacturers Group (CMMG)	Buchanan House 3 St James's Square London SW1 Y 4JU	
Casino Operators Association (COA)	15 Livesey Street Sheffield S6 2BL	www.casinooperatorsassociation.org.uk coasec@hotmail.co.uk
Financial Services Authority (FSA)	25 The North Colonnade Canary Wharf London E14 5HS	www.fsa.gov.uk
GamCare	2nd Floor 7-11 St Johns Hill Clapham Junction London SW11 1TR	www.gamcare.org.uk info@gamcare.org.uk
Gordon House Association	Gordon House Central Office 114 Wellington Road Dudley West Midlands DY1 1UB	www.gordonhouse.org.uk help@gordonhouse.org.uk
Horserace Betting Levy Board	Parnell House 25 Wilton Road, London, SW1V 1LW	www.hblb.org.uk enquiries@hblb.org.uk

Appendix 2

Organisation	Address	Website and email
Hospice Lotteries Association	Ty Hafan Childrens Hospice St Hilary Court Copthorne Way Calderhouse Cross Cardiff CF5 6ES	www.hospicelotteries.org.uk
Independent Betting Adjudication Service	PO Box 62639 London EC3P 3AS	www.ibas-uk.com adjudication@ibas-uk.co.uk
Independent Bookmakers Association (IBA)	187-189 London Road Liverpool L3 8JG	www.independentbookmakers.com
Lotteries Council	42 Kynston Road Shrewsbury SY1 2UN	www.lotteriescouncil.org
Administration of Gambling (AGT Ltd) National Joint Pitch Council (NJPC)	3a Kings Hall St Ives Business Park St Ives PE27 4WY	mainoffice@agt-ltd.co.uk www.njpc-ltd.co.uk
National Casino Industry Forum (NCIF)	38 Grosvenor Gardens London SW1W 0EB	director@nci-forum.co.uk
Pools Promoters Association	Sportech House Enterprise Way Liverpool L13 1FB	
Racecourse Promoters Association (RCPA)	24 Lancashire Road Bishopston Bristol BS7 9DL	
Racecouse Association (RCA)	Winkfield Road Ascot Berkshire SL5 7HX	www.britishracecourses.org info@racecouseassociation.co.uk
Remote Gambling Association	6th Floor High Holborn House 52-54 High Holborn London WC1V 6RL	www.rga.eu.com
Responsibility in Gambling Trust	c/o London Clubs International 10 Brick Street London W1J 7HQ	www.rigt.org.uk enquiries@rigt.org.uk
Responsible Gambling Fund	The Blackfriars Foundry 156 Blackfriars Road London SE1 8EN	
Responsible Gambling Strategy Board	PO Box 15065 Birmingham B2 2NG	
Scottish Independent Bookmakers Association (SIBA)	White Craigs House Glasgow G46 6SN	mail@abb.uk.com

Keeping gambling fair and safe for all

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

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

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