

## **British Horseracing Authority**

### **Data session on betting activity levels in British racing**

Date: 02/12/22

#### **GC Attendees**

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

#### **BHA attendees:**

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Apologies: [REDACTED]

#### **Background**

Timeline of activity leading up to meeting:

- 21 June – Marcus intro meeting with BHA Chair and CEO [REDACTED]
- 26 July – Letter to Marcus from Gambling Strategy Group with accompanying Regulus analysis
- 14 Sept – Marcus response to BHA Chair
- 12 Oct – BHA Chair letter to Marcus with request for meeting to share data
- 30 Nov – Note from Levy Board CEO to Andrew regarding their role at the meeting
- 2 Dec – Meeting between GC and BHA takes place

The meeting arranged for 02/12/22 was as a result of the BHA chair letter on the 12 Oct.

#### **Note of the meeting**

, [REDACTED] gave an overview of the Horse Racing industry and highlighted concerns they have over reduced revenues into the racing industry and the wider implications of this on employment, competitiveness etc. [REDACTED]

[REDACTED] Explained that some of the data is commercially sensitive between media rights groups. Participants offered to provide more granular data individually. [REDACTED] then handed over to different individuals to give their perspective.

[REDACTED]:

[REDACTED]

[REDACTED]

Believe that higher staking customers are reducing stakes as a result of affordability checks and also moving money offshore (creating a black market risk - with anecdotal evidence for this). They do not believe the impact of bookmakers imposing commercial restrictions has changed despite anecdotal evidence.

Suggested black market risk is manifesting with offshore operators such as [REDACTED] targeting high staking customers.

They want to grow the digital market for racing (given ageing population in LBO's) but decline in live streaming is worrying

[REDACTED]:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Referred to sweet spot of regulation and needing to find the right balance. Operators want clarity on thresholds for affordability checks.

Expressed the view that affordability shouldn't be the sole indicator of harm should be considered in the round with other markers of harm.

[REDACTED]

They have data and trends over a long period of time and have seen high staking customers and lower but frequent customers fall away

Believes customers are turning to the black market, including a growing domestic black market in the UK through increased use of whatsapp and telegram

They would be happy to share their data including data to help size the black market

Believes that we need a sharper way of assessing affordability

**Next steps:**

Following the meeting, the BHA have asked:

- 1) To agree a process for individual organisations to share commercially sensitive data with us to assist market analysis and policy design
- 2) To meet again with policy colleagues following the publication of the white paper

**Slide shared by** [REDACTED] (marked strictly private and confidential)

