

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- New stake limit Unmasking the opportunities
- Bringing communities together



"With the new stake limit coming into play, the future looks bleak for the betting shops market. If operators can move away from their heavy reliance on gaming machines and towards improving customer experience and promoting a community spirit, they're more likely to weather the storm".

- Zameira Hersi, Leisure Analyst

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | s +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Products covered in this Report

EXECUTIVE SUMMARY

- The market
- Market has experienced an inevitable decline...
- · ...and the trend is expected to continue

Figure 1: Forecast of consumer expenditure in betting shops, 2013/14-2023/24

Drop in staple over-the-counter bets

Figure 2: Consumer expenditure on betting in betting shops, 2015/16-2017/18

- New stake comes into play
- Bookmakers can now focus on boosting the experience
- Community spirit
- Companies and brands
- · Slight decline in betting shop numbers
- Things are looking bleak...
- ...but not for all

Figure 3: UK betting shop numbers, by operator, September 2018

- The consumer
- Almost 9 in 10 adults have never visited a betting shop

Figure 4: Betting shop visiting habits, February 2019

Majority visit to place bets over the counter

Figure 5: Participation in betting shop activities, February 2019

· The bulk of visitors place bets on horse racing

Figure 6: Bets placed in betting shops, February 2019

Good social interactions are sought after

Figure 7: Drivers for visiting betting shops, February 2019

A quarter place bets on sports online

Figure 8: Online behaviour, February 2019

What we think

ISSUES AND INSIGHTS

- New stake limit Unmasking the opportunities
- The facts
- The implications
- Bringing communities together
- The facts

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Market has experienced an inevitable decline...
- ...and the trend is expected to continue
- Drop in staple over-the-counter bets
- New stake coming into play
- Community spirit

MARKET SIZE AND FORECAST

Market has experienced an inevitable decline...

Figure 9: Consumer expenditure in UK betting shops, 2013/14-2023/24

...and the trend is expected to continue

Figure 10: Forecast of consumer expenditure in betting shops, 2013/14-2023/24

Betting GGY is in decline

Figure 11: UK betting shops gross gambling yield (GGY), by segment, 2015/16-2018/19

Drop in staple over-the-counter bets

Figure 12: Consumer expenditure on betting in betting shops, 2015/16-2017/18

Forecast methodology

MARKET DRIVERS

- Problem gambling
- New stake coming into play
- Bookmakers can help identify problem gamblers
- Driving the problem underground
- Community spirit

COMPANIES AND BRANDS - WHAT YOU NEED TO KNOW

- · Slight decline in betting shop numbers
- Things are looking bleak...
- ...but not for all
- · Testing the limit
- Ladbrokes Coral among the first to extend coverage of greyhound racing
- Ladbrokes continues to invest heavily in ATL advertising
- Paddy Power Betfair invests in shop technology

MARKET SHARE

- Slight decline in betting shop numbers
- Things are looking bleak...

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

Betting Shops - UK - April 2019

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



...but not for all

Figure 13: UK betting shop numbers, by operator, September 2018

LAUNCH ACTIVITY AND INNOVATION

- Testing the limit
- Setting sights across the pond
- · Ladbrokes hits the target with PDC sponsorship
- Betfred named as the title sponsor of golf's British Masters
- Betfred makes a generous donation
- Ladbrokes Coral among the first to extend coverage of greyhound racing

ADVERTISING AND MARKETING ACTIVITY

Ladbrokes continues to invest heavily
 Figure 14: Main monitored media advertising spend of UK betting shop operators, 2015-18

Nielsen Ad Intel coverage

COMPANY PROFILES

Ladbrokes Coral

Figure 15: Ladbrokes Coral retail KPIs, 2017 and H1 2018

William Hill

Figure 16: William Hill retail KPIs, 2017-18

Betfred

Figure 17: Betfred KPIs, 2016-17

Paddy Power Betfair

Figure 18: Paddy Power Betfair retail KPIs, 2017-18

THE CONSUMER - WHAT YOU NEED TO KNOW

- Almost 9 in 10 adults have never visited a betting shop
- · Majority visit to place bets over the counter
- · The bulk of visitors place bets on horse racing
- Good social interactions are sought after
- A quarter place bets on sports online

BETTING SHOP VISITING

Almost 9 in 10 adults have never visited a betting shop
 Figure 19: Betting shop visiting habits, February 2019

Skew towards males

BETTING SHOP ACTIVITIES

Majority visit to place bets over the counter

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

Betting Shops - UK - April 2019

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 20: Participation in betting shop activities, February 2019

BETS PLACED IN BETTING SHOPS

- The bulk of visitors place bets on horse racing
- · Opportunity to win over sport betting fans

Figure 21: Bets placed in betting shops, February 2019

DRIVERS OF VISITING

- Good social interactions are sought after
 Figure 22: Drivers for visiting betting shops, February 2019
- Link to the community
- The youth value a modern look

ONLINE BETTING ACTIVITIES

- A quarter place bets on sports online
 Figure 23: Online betting activities, February 2019
- · Sports betting dominated by men
- Younger adults more likely to bet on sport online

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Data sources
- Abbreviations
- Consumer research methodology

APPENDIX - MARKET SIZE AND FORECAST

Figure 24: Forecast of consumer expenditure in UK betting shops, 2018/19-2023/24

Fan chart forecast

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|-------------------|---|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| | |
| Americas | +1 (312) 943 5250 |
| Americas China | +1 (312) 943 5250 +86 (21) 6032 7300 |



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.