

Casinos and Bingo - UK - March 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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



"New venue concepts in the casino and bingo club markets are set to play a key role in shaping the future of both."

– David Walmsley, Senior Leisure Analyst

This report looks at the following areas:

- Will convenience gaming change the shape of the bingo market?
- Can the destination casino draw in a broader crowd?
- Is there a place for mobile in the traditional venue mix?

The UK casino market is benefitting from a rising London segment and improving spend per head more widely, but has become increasingly reliant on its new breed of large venues for admissions growth.

In bingo, investment in product and facilities has not only helped the sector return to value growth but has also slowed its long-term volume decline to the point at which increasing admission numbers could soon become a realistic ambition once more.

New venue formats could be the biggest influence on the future shape of both markets, with resort casinos, the bingo 'club-pub' and a new high street 'convenience bingo' brand all holding strong potential to attract a bigger and more diverse crowd.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Casinos and Bingo - UK - March 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Covered in this Report

Executive Summary

New venue effect drives casino market growth

Figure 1: Forecast of consumer expenditure in casinos, 2010/11-2020/21

Return of investment starts paying out for bingo

Figure 2: Forecast of consumer expenditure in bingo clubs, 2010-20

Table focus on gaming not dining

Figure 3: Consumer expenditure in casinos, by segment, 2014/15

Tax regime change stabilises bingo spend

Figure 4: Consumer expenditure in bingo clubs, by segment, 2015

New venue formats out to change the game

Figure 5: Active licensed casino and bingo club numbers, 2011-15

Casinos show more of their hand to play with a fuller deck

Figure 6: Casino visiting habits, January 2016

Personal service to take casino visitors beyond the table and the bar

Figure 7: Casino activities done, January 2016

Bingo's past still key to its future

Figure 8: Bingo club visiting habits, January 2016

Main game focus keeps value for money centre stage

Figure 9: Bingo club activities done, January 2016

Spending and trust the big barriers to getting online

Figure 10: Barriers to online casino game or bingo play, January 2016

What we think

Issues and Insights

Will convenience gaming change the shape of the bingo market?

The facts

The implications

Can the destination casino draw in a broader crowd?

The facts

The implications

Is there a place for mobile in the traditional venue mix?

The facts

The implications

The Market – What You Need to Know

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Casinos and Bingo - UK - March 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

New class of venue helps up casino spend
 Established casinos stuck in slow lane of growth
 Return of investment pays out for bingo
 Bingo clubs prepare to turn the corner

Market Size and Forecast: Casinos

Another large casino – another revenue jump

Figure 11: Consumer expenditure* in casinos, 2010/11-2020/21

New venue effect moves the dial on admissions

Figure 12: Casino admissions, 2011/12-2014/15*

Forecast

Figure 13: Forecast of consumer expenditure* in casinos, 2010/11-2020/21**

Market Size and Forecast: Bingo

Bingo starts to feel benefit of duty cut

Figure 14: Consumer expenditure* in bingo clubs, 2010-20

Admission decline continues to level out

Figure 15: Bingo club admissions, 2012-15

Forecast

Figure 16: Forecast of consumer expenditure in bingo clubs*, 2010-20

Segment Performance

Casinos sharpen focus on food and drink

Figure 17: Consumer expenditure in casinos, by segment, 2012/13-2014/15

Bingo games first to win in tax regime change

Figure 18: Consumer expenditure in bingo clubs, by segment, 2013-15

Market Drivers

Capital investment turns towards innovation

Figure 19: Active licensed casino and bingo club numbers, 2011-15

Technology and experience to take remote players offline

Figure 20: Online casino and bingo revenues, 2013-15

Consumers start feeling freer to spend

Figure 21: Trends in how respondents would describe their financial situation, December 2014-December 2015

Bingo bulks up on gaming machines

Figure 22: Gaming machines in casinos and licensed bingo premises*, 2012/13-2014/15

Technology takes venues down mobile route

Figure 23: Plans to purchase or upgrade smartwatches in the next 12 months, by online activities performed in the last three months, September 2015

Key Players – What You Need to Know

Gala brand changes hands

Destination casino books new place in holiday market

Club-pub concept turns up the volume for bingo

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Casinos and Bingo - UK - March 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Bingo back on the high street with new Rank roll-out

Market Share

Casinos – a pair to beat

Figure 24: Leading UK casino operators, by number of venues, February 2016

'Big Two' fill bingo's house

Figure 25: Leading UK bingo club operators, by number of venues, February 2016

Launch Activity and Innovation: Casinos

Destination casino offers a break from the old routine

Progressive jackpots take a seat at the table

Rewards partnerships can prove a winning pair

Venues launch planning applications

Casinos broadcast their offers

Launch Activity and Innovation: Bingo Clubs

Bingo club-pub seeks best of both worlds

Convenience bingo to hit the high street

'Hipster bingo' goes mainstream

Brand Communication and Promotion

Casinos up their adspend

Figure 26: Main monitored media advertising expenditure of UK casino operators, 2013-15

Bingo puts product ahead of promotion

Figure 27: Main monitored media advertising expenditure of UK bingo club operators, 2013-15

Companies, Brands and Products: Casinos

Grosvenor Casinos

Figure 28: Grosvenor Casinos KPIs, 2014-15

Genting UK

Figure 29: Genting UK KPIs, 2013-14

Caesar's Entertainment UK

Figure 30: Caesar's Entertainment UK KPIs, 2013-14

Aspers

Figure 31: Aspers Group KPIs, 2013-14

Companies, Brands and Products: Bingo Clubs

Gala Bingo

Figure 32: Gala Bingo KPIs, 2014-15

Mecca Bingo

Figure 33: Mecca Retail KPIs, 2014-15

Majestic Bingo

Figure 34: Majestic Bingo financials, 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Casinos and Bingo - UK - March 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Carlton Clubs

Figure 35: Carlton Clubs financials, 2014-15

The Consumer – What You Need to Know

- Stalled casinos need to show their full hand
- Casino visitors stick to gaming tables and the bar
- Bingo's past still a key part of its future
- Value focus puts main stage game on top
- Trust and spending fears keep land-based players offline

Casino Visiting

Casinos playing with the same deck
Figure 36: Casino visiting habits, September 2013-January 2016

Out with the old, in with the youth
Figure 37: Casino visiting, by age, January 2016

Casino Activities

Table. Bar. Table. Repeat
Figure 38: Casino activities done, January 2016

Bingo Club Visiting

Moving from managed decline to targeted growth?
Figure 39: Bingo club visiting habits, September 2013-January 2016

Millennials need a human, as well as a digital, touch
Figure 40: Agreement with the statement "I have never been to bingo but might go in future", by gender and age, January 2016

Bingo Club Activities

Main stage stalwarts keep focus on value
Figure 41: Bingo club activities done, January 2016

Main stage still principal attraction
Figure 42: Bingo club activities done, by participation in main hall bingo, January 2016

Online Play

It's all or nothing for bingo club and casino players
Figure 43: Experience of online gambling among casino and bingo club visitors, January 2016

Barriers to Online Play

Money and trust keep retail players offline
Figure 44: Barriers to online casino game or bingo play, January 2016

Seeing is believing
Figure 45: Barriers to online casino game or bingo play, by past-year experience of casino or bingo club visiting, January 2016

Appendix

- Data sources
- Abbreviations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: 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 |
EMAIL: reports@mintel.com

Casinos and Bingo - UK - March 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Fan chart forecast

Figure 46: Forecast of consumer expenditure in casinos, 2015/16-2020/21

Figure 47: Forecast of consumer expenditure in bingo clubs, 2015-20

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com