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Survey of Customers at Ladbrokes and Coral Betting Shops

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1. Executive Summary

Background

DJS Research was appointed by the Competition & Markets Authority (CMA) to conduct interviews with betting shop customers of Ladbrokes and Coral, in order to understand the potential impact of a merger between these two parties. This report details the findings of this research.

Methodology

Face to face interviews using a paper based questionnaire were carried out with customers within Ladbrokes and Coral betting shops. Interviews were completed at 30 betting shops across 15 areas selected randomly by the CMA.

Fieldwork was carried out between 25th January and 22nd February 2016. Interview shifts were carried out on all days of the week and at various times of the day (in line with shop opening hours), to ensure the sample was as representative as possible of customer visits.

A total of 1,916 interviews were completed in Ladbrokes shops, and 2,005 were completed in Coral shops.

Key findings

- The main reason that customers visit betting shops of either party is to place a bet or bets.
- Across Ladbrokes and Coral shops, around three quarters of customers visit the surveyed shop at least once a week, and this increases to nearly 9 in 10 who visit betting shops in general at least once a week.
- The majority of customers of Ladbrokes and Coral shops travel from home or a workplace in the local area to get to the shop.
- Just over a quarter of all customers have placed a bet or gambled online in the last 6 months; of these, around two fifths used the app/website of the same brand as the shop in which they were surveyed.
- Ease of use and the odds offered are the main reasons mentioned for choosing a website for online gambling.
- Overall, convenience is the primary reason why customers chose the betting shop in which they were surveyed. More specifically, the shop being close to their home/work/place they are staying is key overall, while the shop being close to other shops and being easy to get to are reasons of particular importance to Ladbrokes customers.
- When asked what they would do if that particular betting shop was closed for refurbishment for 6 months, 77% of customers overall state that they would go to another betting shop. Just under two thirds (65%) of customers would divert to another Ladbrokes or Coral shop, with significantly more Ladbrokes customers diverting to an alternative Ladbrokes shop (39% Ladbrokes customers versus 31% Coral customers) and significantly more Coral

customers diverting to an alternative Coral shop (33% Coral customers versus 28% Ladbrokes customers).

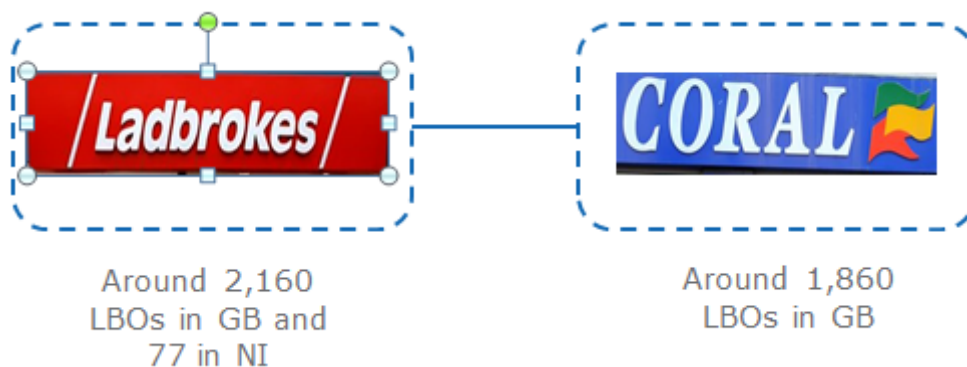
- When asked what they would do if all branches of that particular betting shop were closed for refurbishment for 6 months, just under two thirds overall (63%) say they would go to another betting shop. Around a third of these would go to a betting shop owned by the merger party.

2. Background & Methodology

Introduction

The CMA works to promote competition for the benefit of consumers. Their aim is to make markets work well for consumers, businesses and the economy.

As part of this role, the CMA is responsible for investigating mergers which could restrict competition. The CMA is currently investigating the anticipated merger between Ladbrokes plc and certain businesses of Gala Coral Group Ltd. This includes their licenced betting offices (LBOs) in Great Britain.



As part of this investigation, DJS Research was appointed to conduct a survey with a sample of Ladbrokes and Coral customers, to help the CMA understand the potential impact of the merger.

This report details the findings of these interviews with Ladbrokes and Coral customers.

Research Objectives

The specific objectives of the research were to:

- Understand the purchasing behaviour and characteristics of Ladbrokes and Coral betting shop customers;
- Understand the reasons why customers choose their betting shop(s) and online sites;
- Understand the stated diversion behaviour of respondents at the surveyed shops and how this varies depending on the local areas surveyed;
- Identify the appropriate area over which competition takes place between relevant licensed betting offices.

Methodology

Surveys were conducted across 15 locations sampled at random by the CMA from all areas where Ladbrokes and Coral compete closely. In each location the selected Ladbrokes or Coral shop was paired with the closest merger Party shop, giving a total of 30 shops surveyed.

Fieldwork was carried out between 25th January and 22nd February 2016. Interview shifts were carried out on all days of the week and at various times of the day (in line with shop opening hours), to ensure the sample was as representative as possible of customer visits.

Face to face interviews using a paper based questionnaire were carried out with customers within Ladbrokes and Coral betting shops. The interview itself lasted between five and ten minutes. A pilot shift of interviewing was conducted prior to the main fieldwork in order to check questionnaire timings and question flow. During the pilot, it was found that approaching customers as they entered the betting shop was unlikely to result in the customer agreeing to participate in the survey, because at this point of his/her visit, the customer was intent upon placing their bet or using the gaming machines. The interviewer instructions were therefore amended ahead of the main fieldwork and are detailed in the Appendix.. The questionnaire itself caused no issues for the interviewer or interviewees and so no revisions were made to it following the pilot fieldwork.

Customers of the Ladbrokes and Coral shops selected to participate had to be at least 18 years old and satisfy one or more of the following criteria:

- Being in the shop to place a bet or bets;
- Using the slot / gaming machines;
- Purchasing food or drink within the shop.

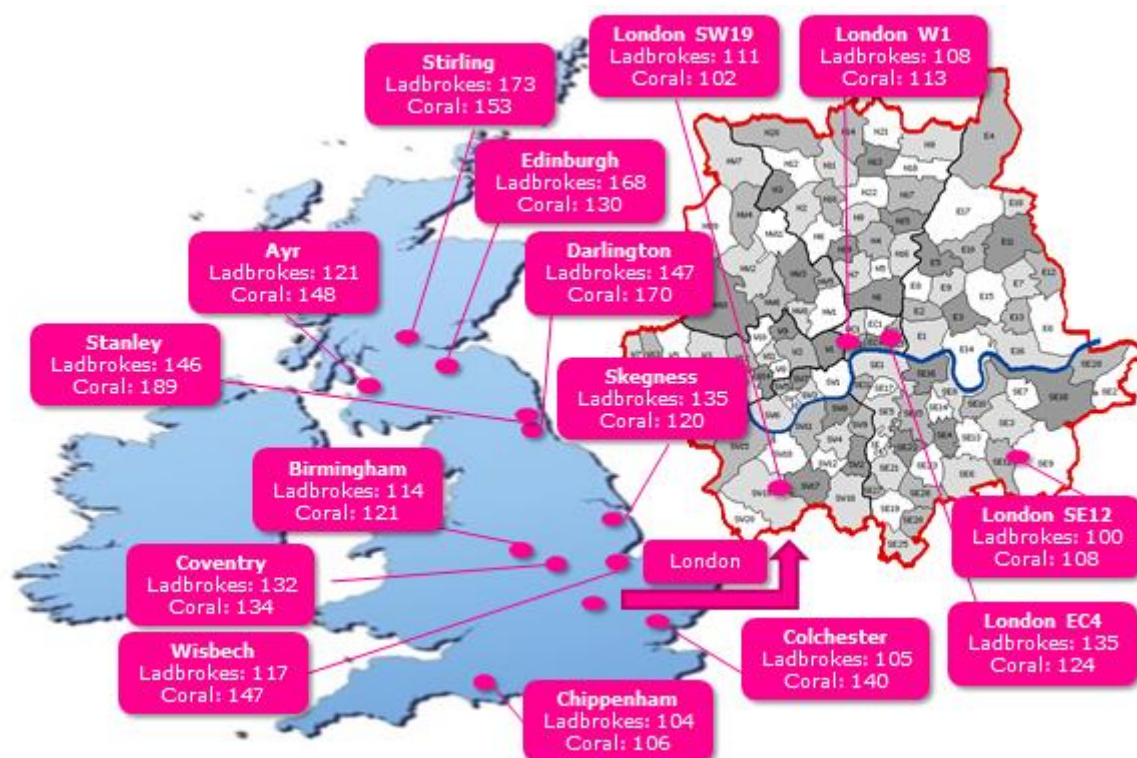
There was a target of 150 interviews per LBO with a minimum requirement of 100; each customer was to be interviewed no more than once.

As many customers as possible were approached to take part in the research, according to instructions designed to randomly sample customer visits and to interview a selection of those using the gaming machines as well as those placing a bet or bets. A response rate of 38% was achieved with Ladbrokes' customers and a response rate of 42% was achieved with Coral customers.

A total of 1,916 interviews were completed in Ladbrokes betting shops, and 2,005 were completed in Coral shops, with no less than 100 interviews being completed in each of the surveyed betting shops.

Figure 1 shows the number of completed interviews in each shop, in each area.

Figure 1 - Number of completed interviews by area



The response rate for Ladbrokes, Coral and overall is shown in Table 1.

Table 1 – Response rates

	Ladbrokes	Coral	Total
Complete interviews (n)	1,916	2,005	3,921
Refusals (n)	3,128	2,776	5,904
Response rate	38%	42%	40%

The gender and age of those who refused to participate were recorded, again to examine if the sample was broadly representative of all customers. Gender and age were not explicitly asked of the refusing customer – instead the interviewer recorded the gender and made an estimate of the customer's age. There were instances where repeat customers to a shop were approached more than once to take part in the survey (more than one interviewer often covered a shop's shifts and so would not necessarily recognise someone who had already taken part). In these cases the customers were not surveyed again and they were not included in the refusal tally. The response rate by gender and age is broadly similar. Response rate by gender is shown in Table 2 and a comparison by age is shown in Table 3.

Table 2 – Response rate by gender *

	Ladbrokes			Coral		
	Males	Females	Total	Males	Females	Total
Complete interviews (n)	1716	194	1910	1795	208	2003
Refusals (n)	2758	370	3128	2360	416	2776
Total (n)	4474	564	5038	4155	624	4779
Response rate (%)	38%	34%	38%	43%	33%	42%

* In a small number of cases gender was not recorded

Table 3 – Comparison of age**

	Ladbrokes				Coral			
	18-35	36-59	60+	Total	18-35	36-59	60+	Total
Complete interviews (n)	482	794	636	1912	576	875	553	2004
Complete interviews (% of total)	25%	42%	33%	100%	29%	44%	28%	100%
Refusals (n)	655	1410	1064	3128	685	1150	941	2776
Refusals (% of total)	21%	45%	34%	100%	25%	41%	34%	100%

** As some respondents refused to reveal their age, it is not possible to calculate an accurate response rate by age. Instead, we can compare the proportion of customers (complete interviews versus refusals) that fall into three age groups. Customers who refused to take part were not directly asked their ages so the refusals age groups are estimated.

As part of the analysis, we applied significance testing between groups at the 5% significance level.

Fieldwork quality

The CMA carried out a number of spot-checks on interview shifts, mainly in the first week of interviewing. Ten shops were visited across eight areas, on different days of the week and at various times. In a minority of cases, the following issue was identified:

- Interviewers were not always adhering to the stipulated shift times (e.g. turning up late or leaving early) and on occasion did not turn up to a shift without informing their supervisor

As a result of this, DJS Research re-briefed the interviewers, reiterating the interviewer instructions.

DJS Research's regional supervisors subsequently undertook a number of spot-checks on interviewers to ensure that instructions were being followed, and feedback was largely positive. The only issue reported related to instances where interviewers were approaching customers who had previously been approached by an interviewer, but this is unavoidable, especially when different interviewers are undertaking shifts at a shop and it caused no problems.

We conclude that the effect of these issues is likely to be small. The scheduling of interviewer shifts meant that interviewing took place at varied times of day and days of week and small deviations from these would have little impact.

Analysis of the survey data showed that one question – Q11 – was not asked when it should have been (73 instances). When calculating diversion ratios, these cases have been treated in the same way as 'don't know' responses at Q11.

3. Profile of respondents

Gender

Respondents were more likely to be male than female, with no differences between Ladbrokes and Coral.

Table 4 shows the proportion of males and females that participated in the research.

Table 4 – Gender of respondents

(Base - all respondents, Ladbrokes n= 1,916, Coral n= 2,005)

Gender	Ladbrokes (%)	Coral (%)
Male	90	90
Female	10	10

Age

The age of respondents ranged from 18 years old to over 90 years old (those under 18 years old were excluded from the research but there was no upper age limit). Table 5 shows the proportion of each age group that participated in the research.

Table 5 – Age of respondents

(Base - all respondents, Ladbrokes n= 1,916, Coral n= 2,005)

Age	Ladbrokes (%)	Coral (%)
18-35	25	29
36-59	41	44
60+	33	28

Employment status

Slight differences can be seen between the Ladbrokes customers and the Coral customers, although in both cases the majority of customers are working, either full-time or part-time. For Ladbrokes customers, just over three fifths (61%) are working while for Coral customers it's slightly more, at just over two thirds (67%). Just over a quarter (28%) of Ladbrokes customers are retired, compared with just over one fifth (22%) of Coral customers. Just under 1 in 10 customers in both betting shops are not looking for work (8% Ladbrokes customers, 9% Coral customers).

The profile can be seen in Table 6.

Table 6 – Employment status of customers

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)

Age	Ladbrokes (%)		Coral (%)	
Working full-time	53	} 61%	58	} 67%
Working part-time	7		9	
Not working – looking for work	4	} 8%	5	} 9%
Not working – not looking for work	4		4	
Student	2		2	
Retired	28		22	
Looking after family/home	1		1	
Refused / Other	1		-	

Internet usage

Frequency of internet usage was concentrated into two groups; those using it every day and those never using it. See Table 7. Older people use the internet less frequently (64% of those in the older age group state 'never' versus 20% of those aged 36-59 and 3% of those aged 18-35).

Table 7 – Internet usage of respondents

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)

Internet usage	Ladbrokes (%)	Coral (%)
Every day	50	54
5-6 days a week	5	4
2-4 days a week	7	7
Once a week	3	3
Once a fortnight	1	1
About once a month	1	1
Less than once a month	2	2
Never	30	28

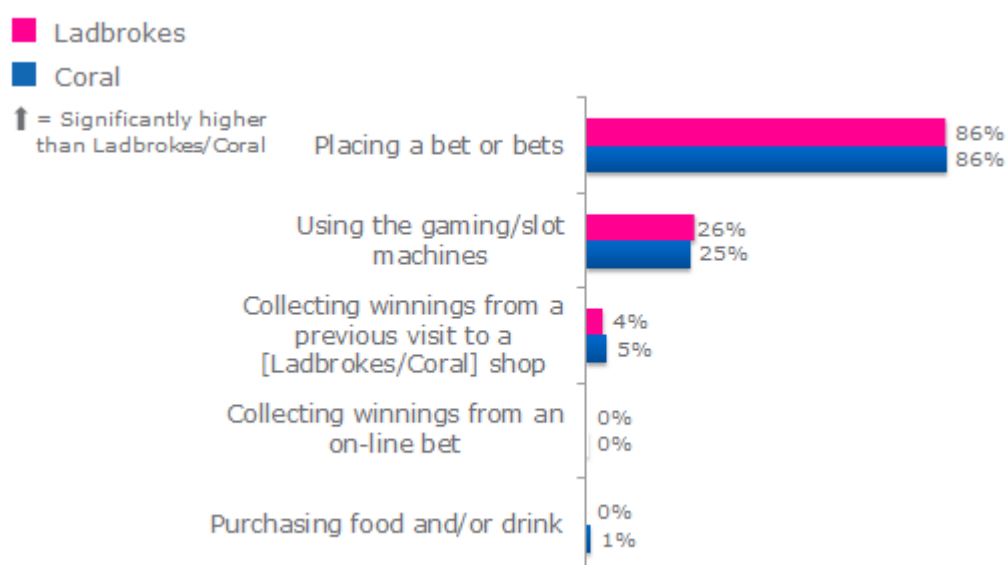
4. The visit

The majority of customers at both Ladbrokes and Coral betting shops are there to place a bet or bets, while around a quarter are there to use the gaming / slot machines. See Figure 2. Just over 1 in 10 are there to place a bet or bets in addition to using the machines.

Similar proportions of Ladbrokes and Coral customers are in the shop to place a bet, use the machines and purchase food/drink. There are differences apparent in terms of age and gender, however, with customers in the older age groups being more likely to place bets (96% of those aged 60+ and 87% of those aged 36-59, versus 72% of those aged 18-35), while younger customers are more likely to use the gaming/slot machines (45% 18-35 year olds, versus 26% 36-59 year olds and just 8% aged 60+). Males are more likely to place a bet than females (86% versus 83%). Differences between areas of the UK are also apparent with those in London more likely to use gaming or slot machines (35% of those in London versus 24% of those in Scotland and 23% of in England (excluding London)).

Figure 2 – Motivation behind visit to the betting shop

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)

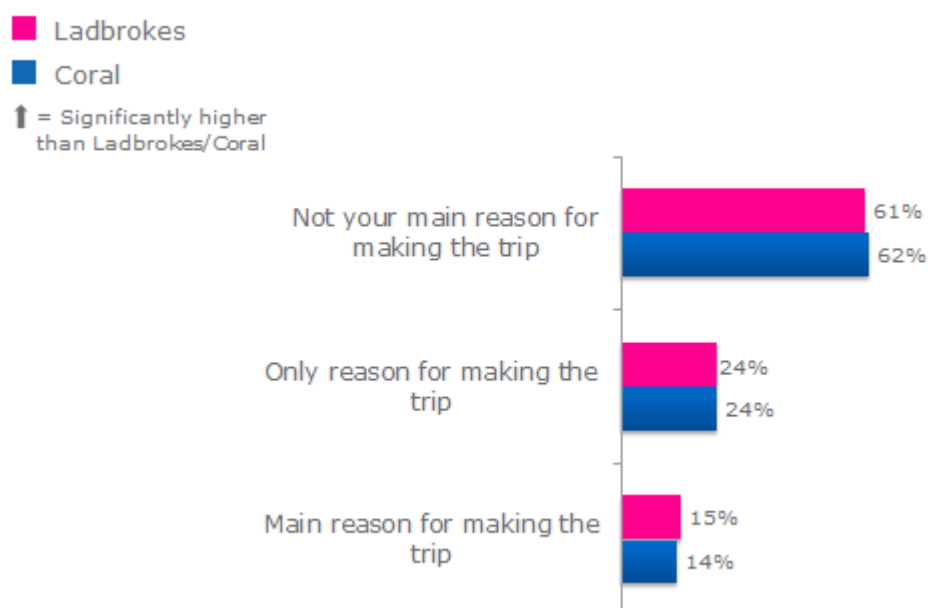


Q1. Which of these, if any, are you/will you be doing/have you done in this [Ladbrokes/Coral] shop today? MULTICODE

For around three fifths of both Ladbrokes and Coral customers, their visit to the betting shop was not their main reason for making the trip out (61% Ladbrokes, 62% Coral), while for just under a quarter of customers, their visit was their only reason for their trip. See Figure 3. Those in the youngest age group are more likely to state that their visit was not their main reason for the trip (68% 18-35 year olds versus 63% 36-59 year olds and 52% aged 60+). Customers in Scotland are more likely to say that their visit was their only reason for their trip (29% of those in Scotland versus 22% of those in England (excluding London) and 23% of those in London).

Figure 3 – Priority of visit to betting shop

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)

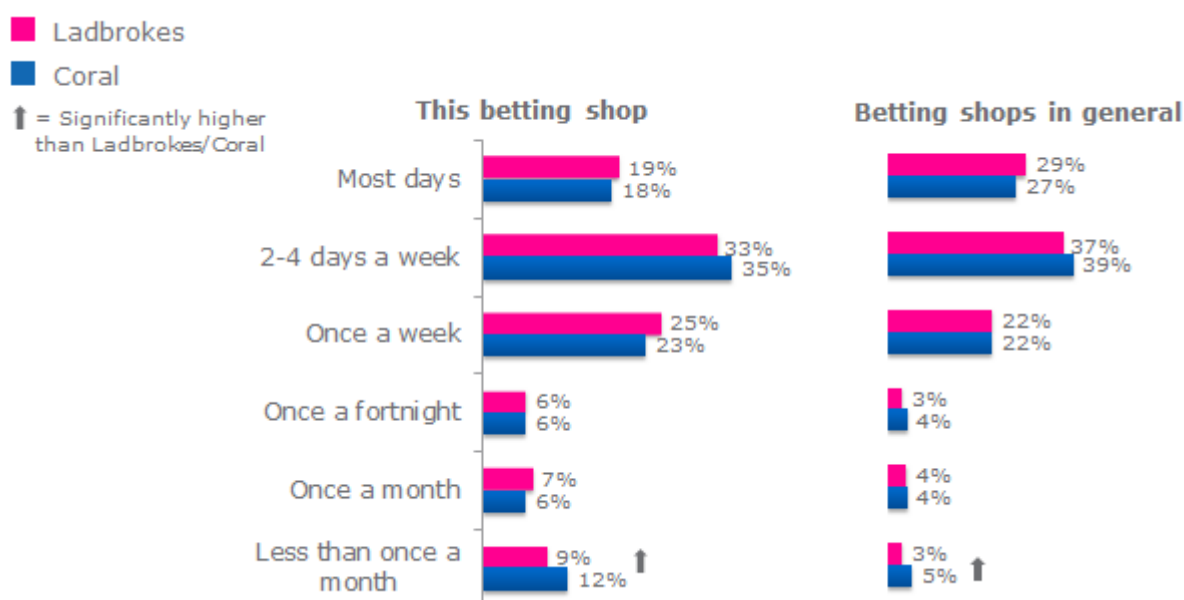


Q5. Was your visit to [Ladbrokes/Coral]... SINGLE CODE

Across both Ladbrokes and Coral, around three quarters of customers visit that particular betting shop at least once a week, and nearly 9 out of 10 visit betting shops in general at least once a week. See Figure 4. Older customers are more likely to visit that particular betting shop more frequently with 26% of those aged 60+ visiting most days, versus 17% of those aged 36-59 and 12% of those aged 18-35. The same can be said for visiting betting shops in general most days (37% of those aged 60+ versus 26% aged 36-59 and 19% aged 18-35). Males visit more frequently than females (visiting that betting shop on most days - 20% males versus 10% females; visiting betting shops in general – 29% males versus 14% females). Customers in Scotland also visit that particular betting shop more frequently than their counterparts in England and London (22% of those in Scotland visit most days versus 18% of those in England (excluding London) and 17% of those in London).

Figure 4 – Frequency of visit

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



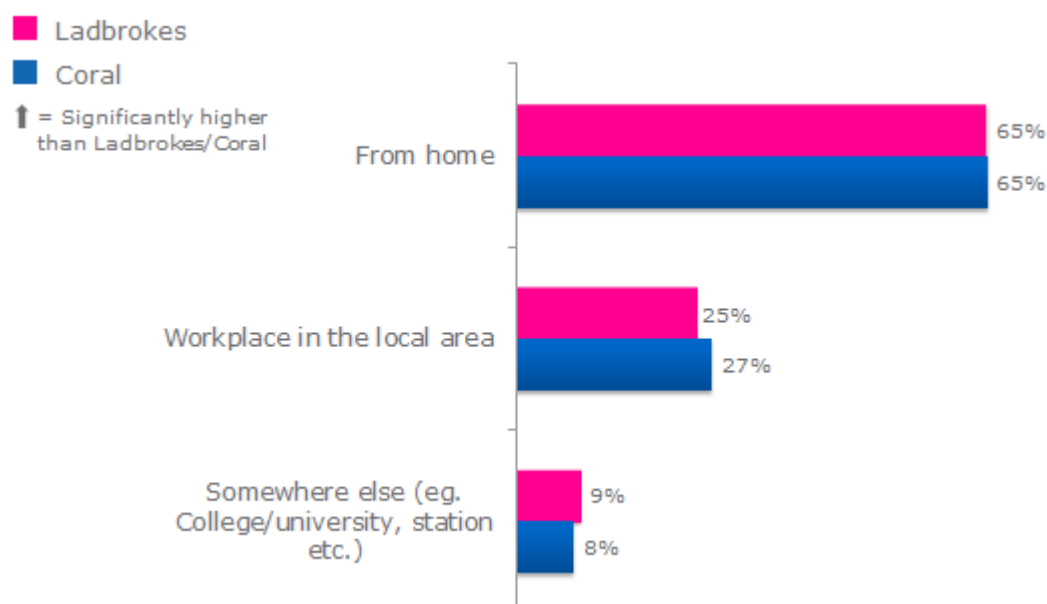
Q2. Which of the following best describes how often you visit this [Ladbrokes/Coral] betting shop? SINGLE CODE

Q3. And which of the following best describes how often you visit betting shops in general? SINGLE CODE

The majority of customers travel from either home or their workplace in the local area in order to get to the betting shop. See Figure 5. Female customers are more likely to have travelled from home compared to males (75% versus 64%) and older customers are also more likely to have travelled from home (85% of those aged 60+ versus 57% of those aged 36-59 and 55% of those aged 18-35). Customers in London are more likely to have travelled from their workplace compared with customers in other areas (52% of those in London have travelled from their workplace versus 24% of those in Scotland and 16% of those in England (excluding London)).

Figure 5 – Where travelled from

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



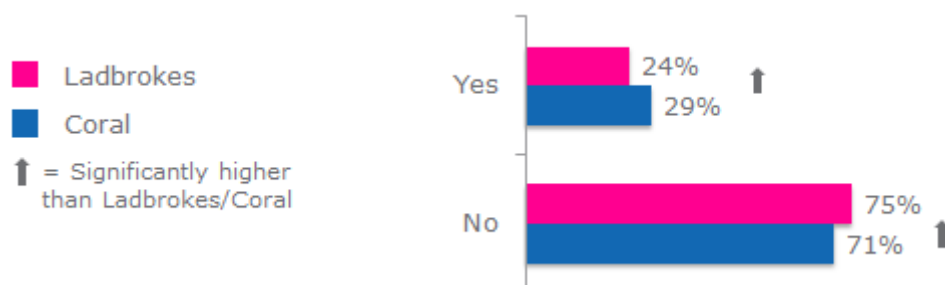
Q4. Where in this local area did you travel from to get here? SINGLE CODE

5. Online gambling

Just over a quarter (27%) of all customers overall have placed a bet or gambled online in the last 6 months, with significantly more Coral customers having done so when compared with Ladbrokes customers (29% versus 24%). See Figure 6. Differences are evident between the age groups, with those in the younger age group being more likely to place bets/gamble online than those in the older two groups (48% of those aged 18-35 versus 27% of those aged 36-59 and 7% of those aged 60+). Males are also more likely to place a bet or gamble online compared to females (29% males versus 11% females). Differences can also be seen in terms of frequency of visit to that betting shop – those who visit that shop less than once a month are more likely to have placed a bet or gambled online in the last 6 months when compared to those who visit more frequently (36% of those who visit that shop less than once a month have placed a bet or gambled online in the last 6 months versus 21% of those who visit that shop most days, 26% of those who visit that shop 2-4 days a week and 26% of those who visit that shop once a week).

Figure 6 – Placing bets/gambling online in the last 6 months

(Base - all respondents, Ladbrokes n= 1916, Coral n= 2005)

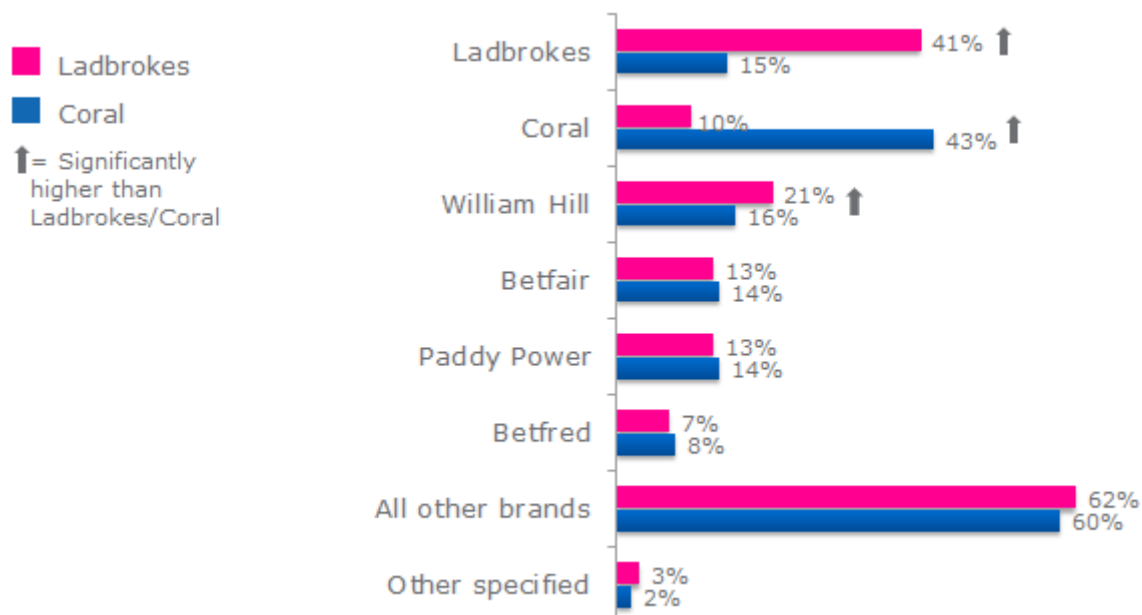


Q6. Have you placed bets or gambled online, including via mobile apps, in the last 6 months?
SINGLE CODE

Those who have used a mobile app/website to place a bet in the last 6 months are more likely to place a bet online with the same brand of shop in which they were surveyed. See Figure 7.

Figure 7 – Use of online sites

(Base - all customers who have used a mobile app to place a bet in the last 6 months, Ladbrokes n= 469, Coral n= 575)

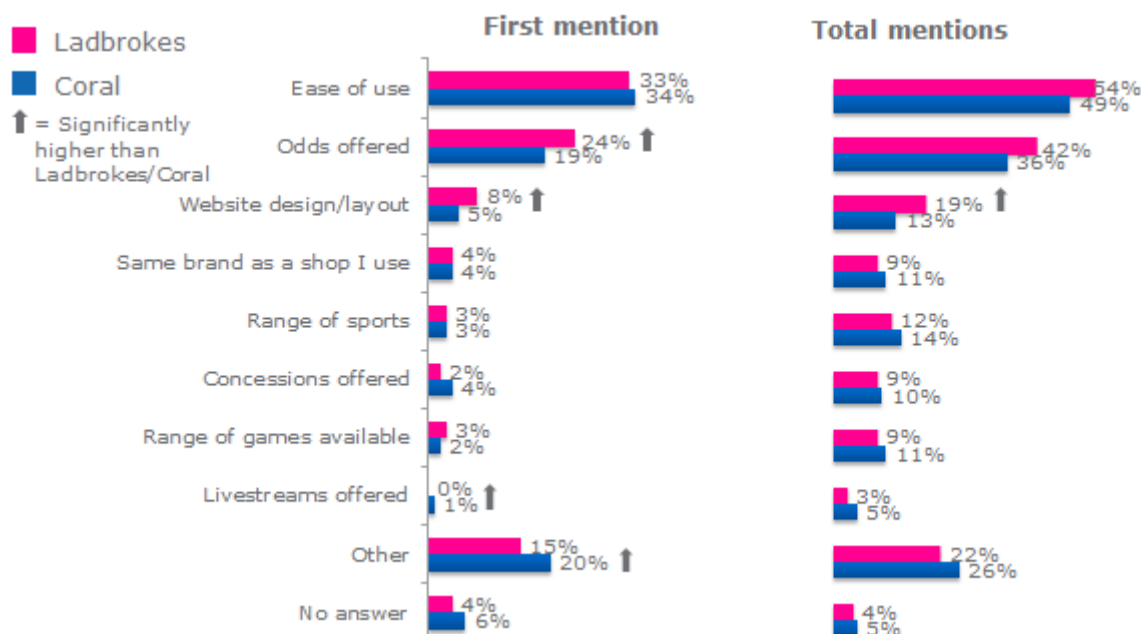


Q6A. Which sites/mobile apps did you use? MULTI CODE

Ladbrokes and Coral customers both mention the same main reasons for choosing the website/app they used for placing their bet. Ease of use and the odds offered are the most mentioned reasons for choosing a website to place an online bet. See Figure 8.

Figure 8 – Reasons for website choice

(Base – customers who have placed a bet/gambled online in the last 6 months & who were able to specify a site, Ladbrokes n= 468, Coral n= 571)



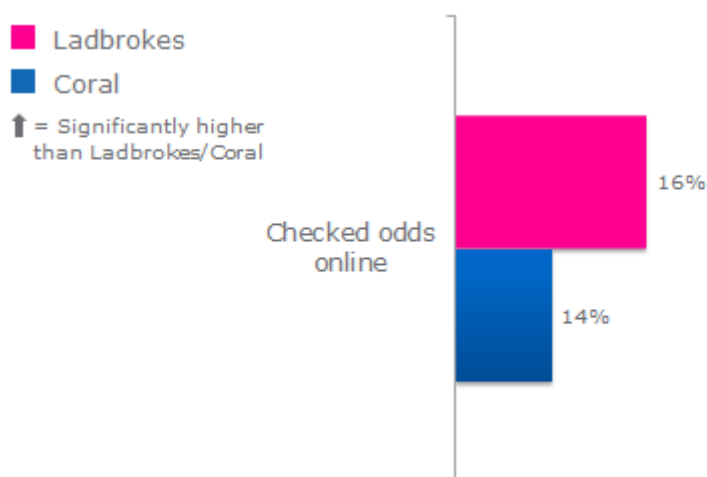
Q6bi. Why did you choose this website/these websites? First mention. SINGLE CODE

Q6bii. Why did you choose this website/these websites? Total mentions. MULTI CODE.

A minority of those who placed a bet or bets in the betting shops checked the odds online before visiting the betting shop. See Figure 9. There are no differences between those who visited a Ladbrokes or a Coral betting shop but males are more likely to check odds than females (16% versus 7%) and those in the younger age group are also more likely to check (22% of those aged 18-35 versus 16% of those aged 36-59 and 9% of those aged 60+).

Figure 9 – Checking the odds online

(Base – customers who were in the shop to place a bet/bets, Ladbrokes n = 1644, Coral n = 1723)



Q7. Did you check odds online when considering whether to place a bet or bets in this betting shop today? SINGLE CODE

6. Choosing a betting shop

Customers were asked to spontaneously state their reasons for choosing the betting shop in which they were being surveyed. These reasons were coded by the interviewer into a pre-coded list which comprised a range of factors. Each factor was banded within a particular factor category (convenience, service, offering/product range, environment, brand/other). Interviewers recorded the customer's first answer as a 'first mention' (one code only) and any/all following answers as 'other mentions' (multi code). Responses were collated and are reported on in terms of 'first mentions' and 'total mentions' ('first mentions' + 'other mentions').

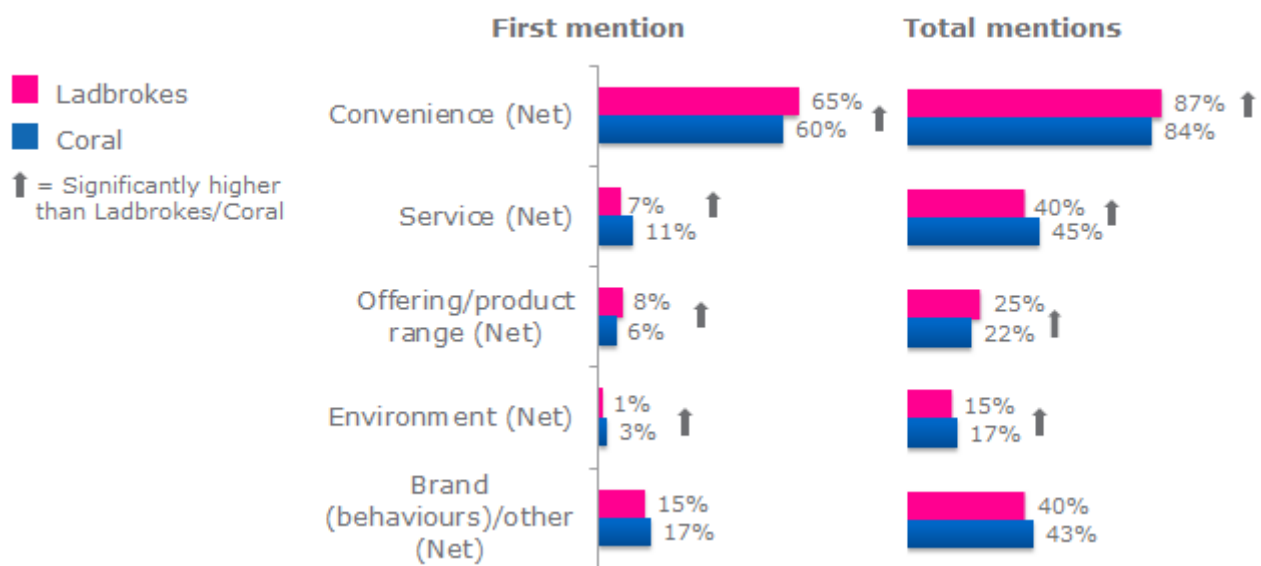
Convenience is the main reason that both Ladbrokes and Coral customers cite spontaneously for choosing the betting shop. Ladbrokes customers place slightly greater importance on convenience than Coral customers (65% versus 60% for first mention). Differences are evident between first mentions and total mentions, with service and brand/other factors clearly being important as secondary reasons for choice.

Figure 10 shows the total (net) responses for each reason category for choice of betting shop. The following charts (Figures 11-15) show the breakdown of factors within each of these high-level categories.

In terms of total mentions, older people are more likely to cite service as a reason for choosing the betting shop they were in when compared to other age groups (50% of those aged 60+ versus 42% of those aged 36-59 and 35% of those aged 18-35). Also in terms of total mentions, all factors other than convenience are more important to those who visit that betting shop frequently (offering/product range - 26% of those who visit that shop on most days versus 15% of those who visit less than once a month; environment - 19% of those who visit on most days versus 10% of those who visit less than once a month; service - 61% of those who visit on most days versus 14% of those who visit less than once a month; brand/other - 53% of those who visit on most days versus 29% of those who visit less than once a month). Convenience is more important to those who visit that shop less frequently (87% of those who visit less than once a month versus 80% of those who visit on most days).

Figure 10 – Reason for choice (Net of all responses within each category)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



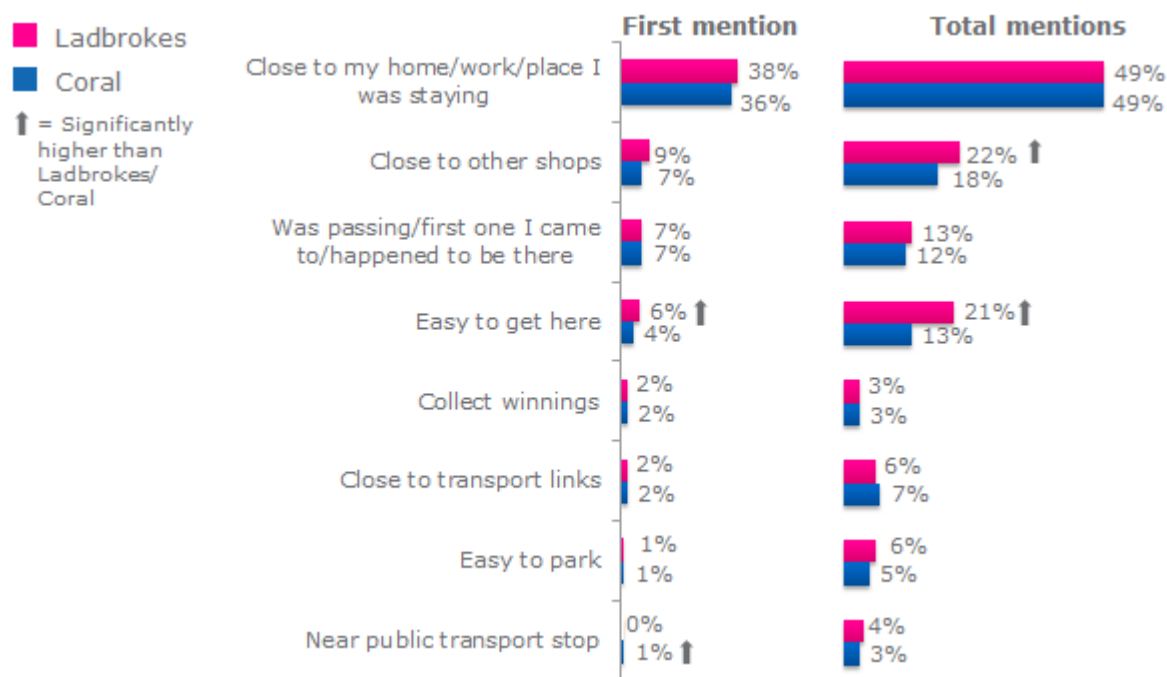
Q8i. Why did you choose this betting shop today? First mention. SINGLE CODE

Q8total. Why did you choose this betting shop today? Total mentions. MULTI CODE

Convenience covers a range of factors which are outlined in Figure 11, below. The betting shop being close to their home/work/place they are staying is a key reason for choosing that shop. Secondary important reasons include the betting shop being easy to get to and also proximity to other shops (of particular importance to Ladbrokes customers)

Figure 11 – Reason for choice: Convenience (breakdown of responses)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



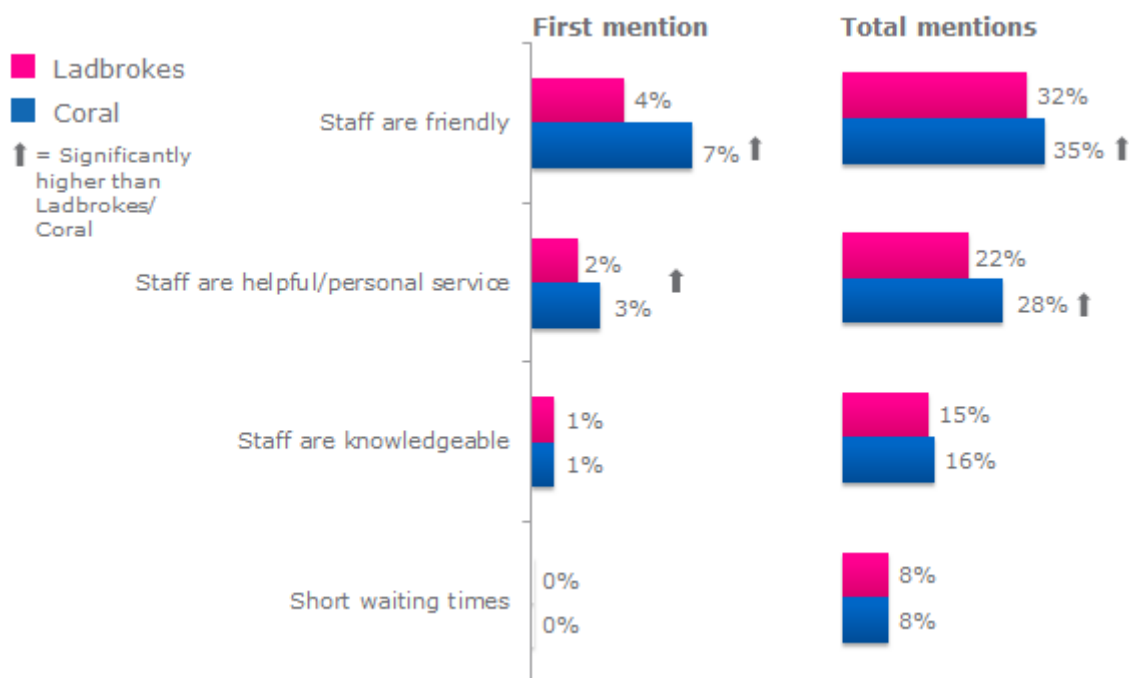
Q8i. Why did you choose this betting shop today? First mention. SINGLE CODE

Q8total. Why did you choose this betting shop today? Total mentions. MULTI CODE

Few people mention service as being a primary reason for choosing the betting shop although it is an important secondary reason. Overall, significantly more Coral customers mention friendly and helpful staff as being a reason for choosing a betting shop when compared to Ladbrokes customers. See Figure 12. In terms of total mentions, service is also of greater importance to female customers than to male customers (50% versus 41%) and older customers (50% of those aged 60+ versus 42% of those aged 36-59 and 35% of those aged 18-35).

Figure 12 – Reason for choice: Service (breakdown of responses)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



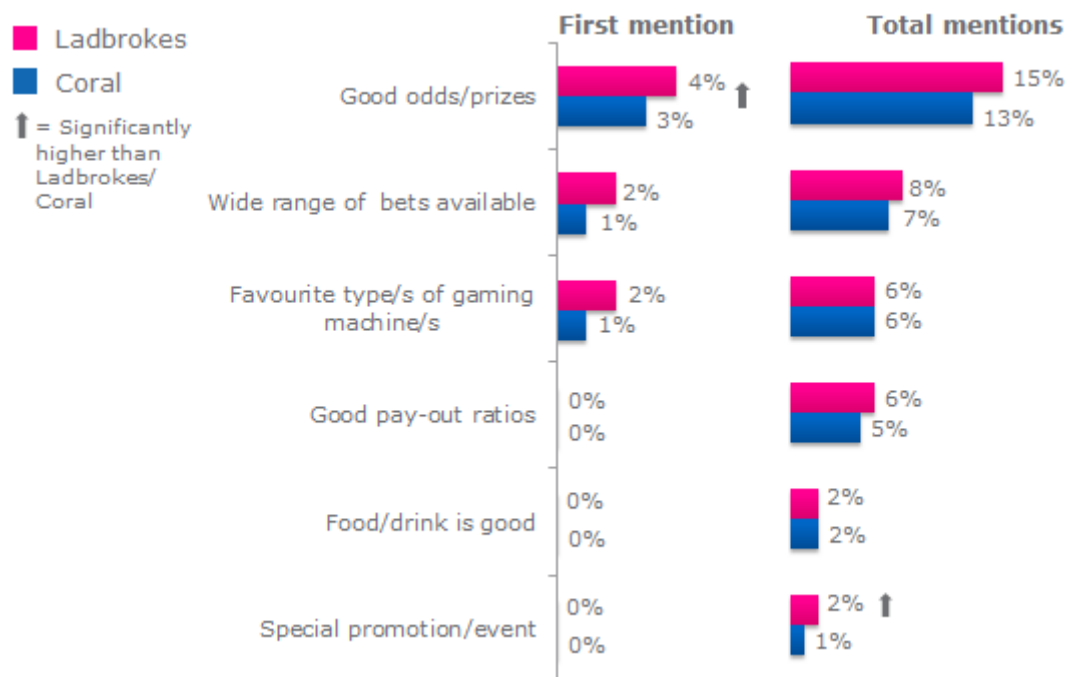
Q8i. Why did you choose this betting shop today? First mention. SINGLE CODE

Q8total. Why did you choose this betting shop today? Total mentions. MULTI CODE

Just over 1 in 10 customers mention that good odds/prizes are a reason for choosing the betting shop, but it is rarely mentioned as a first reason for choosing the betting shop. See Figure 13. In terms of total mentions, significantly more males than females place importance on the offering/product range (24% versus 16%) particularly in terms of good odds/prizes (14% versus 8%) and good pay-out ratios (6% versus 3%).

Figure 13 – Reason for choice: Offering/product range (breakdown of responses)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



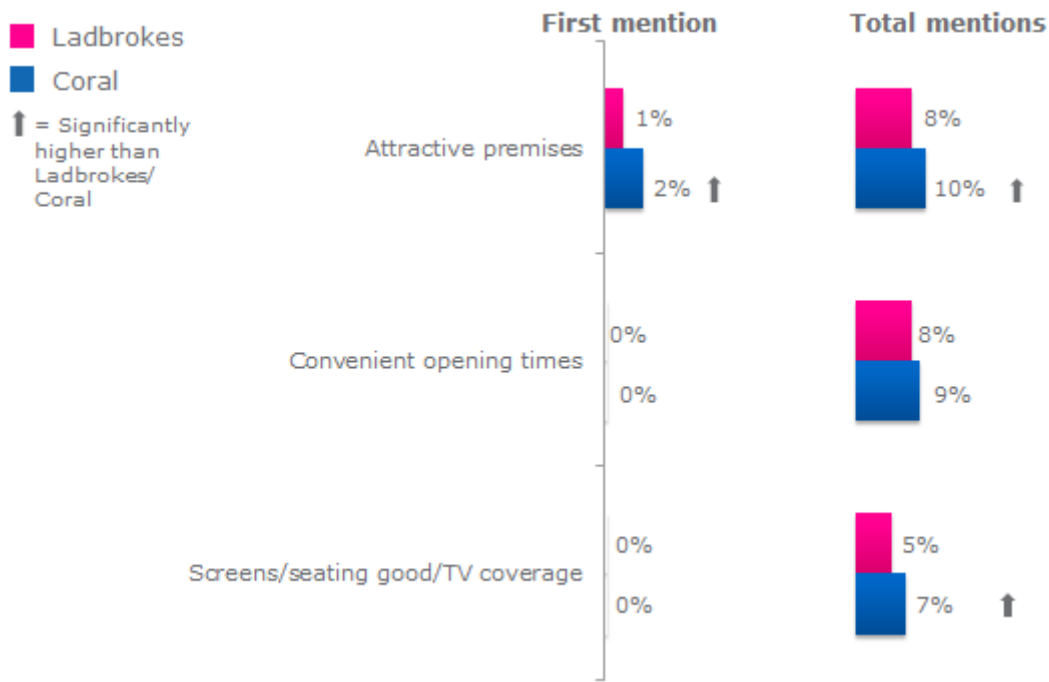
Q8i. Why did you choose this betting shop today? First mention. SINGLE CODE

Q8total. Why did you choose this betting shop today? Total mentions. MULTI CODE

Opening time and interior layout (environment factors) are not highly important as reasons for choosing the betting shop, although more people mention them as secondary reasons. See Figure 14. Environmental reasons are cited by more males than females (16% versus 12%), particularly with regard to convenient opening times (9% versus 6%) and screens/seating/TV coverage (6% versus 2%).

Figure 14 – Reason for choice: Environment (breakdown of responses)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)

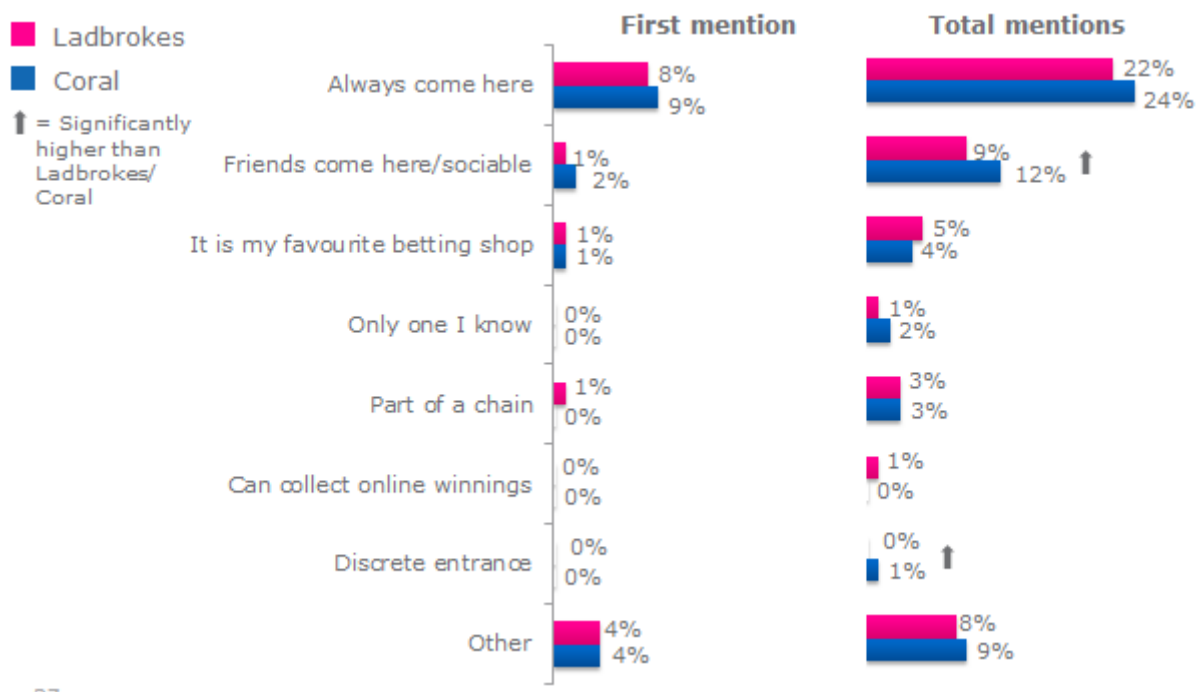


Q8i. Why did you choose this betting shop today? First mention. SINGLE CODE
Q8total. Why did you choose this betting shop today? Total mentions. MULTI CODE

Brand (behaviours)/other factors seem relatively unimportant when compared to other factors, although familiarity ('always come here') is mentioned in totality by just over one fifth of customers. See Figure 15. In terms of total mentions, 'always come here' is mentioned by significantly more females than males (28% versus 22%) and by more older people (28% of those aged 60+ versus 22% of those aged 36-59 and 19% of those aged 18-35).

Figure 15 – Reason for choice: Brand (behaviours)/other (breakdown of responses)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



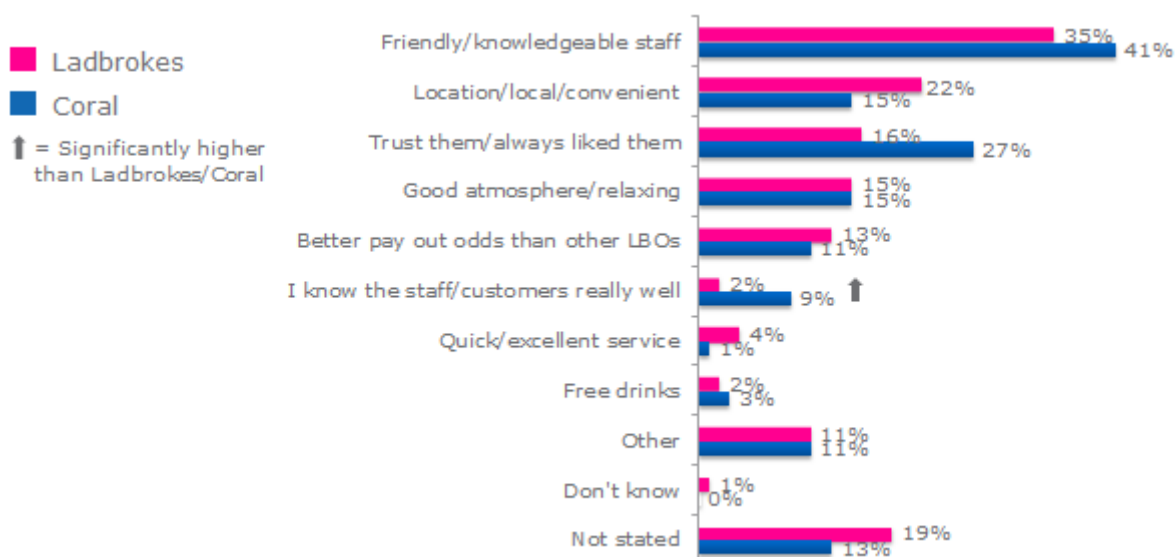
Q8i. Why did you choose this betting shop today? First mention. SINGLE CODE

Q8total. Why did you choose this betting shop today? Total mentions. MULTI CODE

The customers who stated that they went to that shop because it was their favourite were asked why this was and gave a variety of reasons for this, many mentioning the manner of the staff within the shop and the service provided. See Figure 16.

Figure 16 – Reason for favourite betting shop

(Base – customers who state that they chose that betting shop because it's their favourite, Ladbrokes n= 93, Coral n= 75) *Caution: low base sizes*



Q8a. Why is it your favourite betting shop? SINGLE CODE

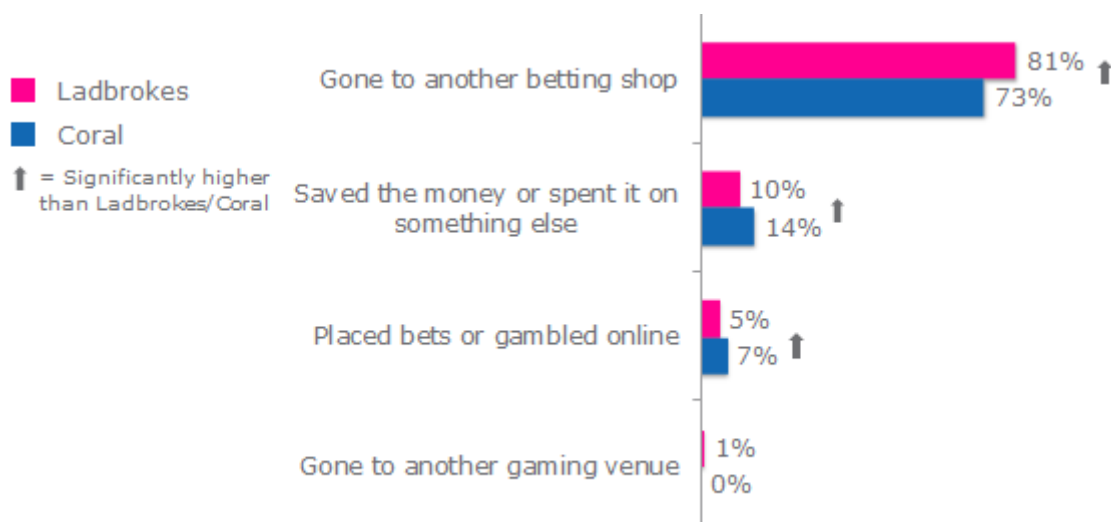
7. Diversion behaviour

Customers were asked a number of 'diversion questions' to ascertain their next best option if the shop they were visiting at the time of the interview was not available. Responses which specify alternative betting shops, in particular, are expected to reflect to some extent the characteristics of the locations being surveyed, all of which were selected from areas where Ladbrokes and Coral compete closely.

In over three quarters of cases overall (77%), customers said that they would go to another betting shop if the one they were visiting was closed for refurbishment for 6 months. Significantly more Ladbrokes than Coral customers state that they would go to another betting shop, while significantly more Coral customers than Ladbrokes customers say that they would save the money or spend it elsewhere, or place their bets/gamble online. See Figure 17. More male customers than female customers would go to another betting shop (79% versus 65%) or place a bet/gamble online (6% versus 3%), females are more likely to save the money or spend it on something else when compared with male customers (23% versus 11%). Older customers are also more likely to go to another betting shop compared with younger customers (85% of those aged 60+ versus 79% of those aged 36-59 and 67% of those aged 18-35). Similarly, younger customers are more likely than the older customers to place a bet or gamble online (11% of those aged 18-35 versus 6% of those aged 36-59 and 2% of those aged 60+).

Figure 17 – Diversion behaviour (current shop closed for 6 months)

(Base - all customers, Ladbrokes n= 1,916, Coral n= 2,005)



Q9. Imagine that this [Ladbrokes/Coral] betting shop was closed for refurbishment for 6 months. Thinking of all the options open to you, what would you have done instead of visiting this betting shop today? SINGLE CODE

Some groups showed different diversion behaviour to others; younger people and those who have gambled online in the last 6 months are more likely to go to another betting shop, as are those who frequently visit that particular betting shop. See Table 8.

Table 8 – Variations in diversion behaviour (current shop closed for 6 months)

(Base – see table)

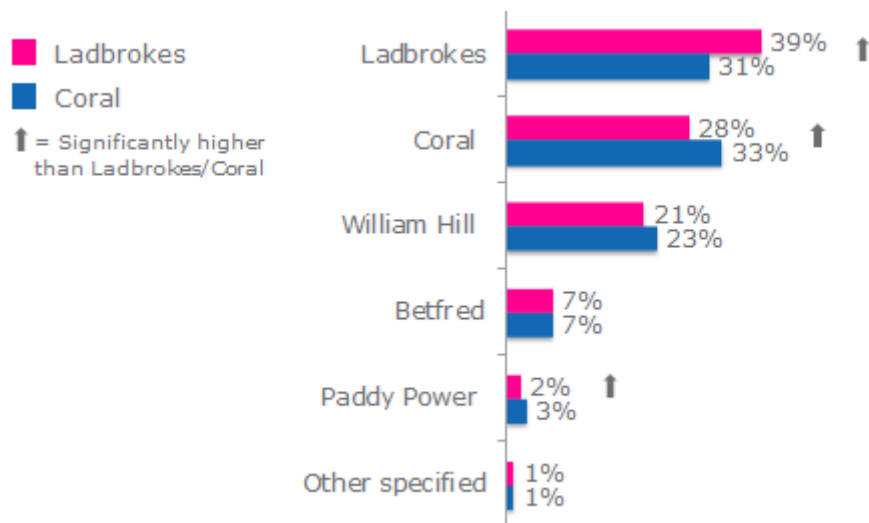
	Total	18-35 years (Ladbrokes n=482, Coral n=575)	Online gamblers (in last 6 months)(Ladbrok es n=469, Coral n=575)	Daily visitors (Ladbrokes n=370, Coral n=359)
Gone to another betting shop	Total 77% Total Ladbrokes 81% Total Coral 73%	Ladbrokes 70% Coral 64%	Ladbrokes 71% Coral 62%	Ladbrokes 83% Coral 77%
Save the money/spent elsewhere	Total 12% Total Ladbrokes 10% Total Coral 14%	Ladbrokes 15% Coral 17%	Ladbrokes 7% Coral 11%	Ladbrokes 6% Coral 11%
Placed bets or gambled online	Total 6% Total Ladbrokes 5% Total Coral 7%	Ladbrokes 9% Coral 13%	Ladbrokes 18% Coral 23%	Ladbrokes 6% Coral 8%

Q9. Imagine that this [Ladbrokes/Coral] betting shop was closed for refurbishment for 6 months. Thinking of all the options open to you, what would you have done instead of visiting this betting shop today? SINGLE CODE

Over half of those who said that they would go to another betting shop would divert to another Ladbrokes or Coral if the current betting shop was closed for refurbishment for 6 months. See Figure 18. Ladbrokes customers would be more likely to go to another Ladbrokes shop (39% of Ladbrokes customers versus 31% of Coral customers) while Coral customers would be more likely to go to another Coral shop (33% of Coral customers versus 28% of Ladbrokes customers). Around a fifth of customers from each shop would go to William Hill (21% of Ladbrokes customers and 23% of Coral customers would go to a William Hill shop).

Figure 18 – Diversion behaviour: shops diverted to

(Base - all who would have gone to another betting shop, Ladbrokes n= 1,561, Coral n= 1,470)



Q10. Which other betting shop would you have gone to?

The proportion of customers stating that they would go to another betting shop of the same company as the shop they were visiting varies a great deal by location with some areas experiencing a much higher level than others. See Table 9.

Table 9 – Proportion of customers stating that they would go to another betting shop of the same company as the one they were visiting

(Base - all who would have gone to another betting shop, Ladbrokes n= 1,561, Coral n= 1,470)
Caution: Surveyed shops were all selected from areas where Ladbrokes and Coral compete closely

	TOTAL	AYR	BIRMINGHAM	CHIPPENHAM	COLCHESTER	COVENTRY	DARLINGTON	EDINBURGH	LONDON EC4	LONDON SE12	LONDON SW19	LONDON W1	SKEGNESS	WISBECH	STANLEY	SITRLING
Ladbrokes customers diverting to Ladbrokes %	35	54	38	14	62	54	74	19	12	34	40	26	42	64	17	30
Coral customers diverting to Coral %	30	34	22	47	46	28	28	2	23	30	51	59	3	69	48	0

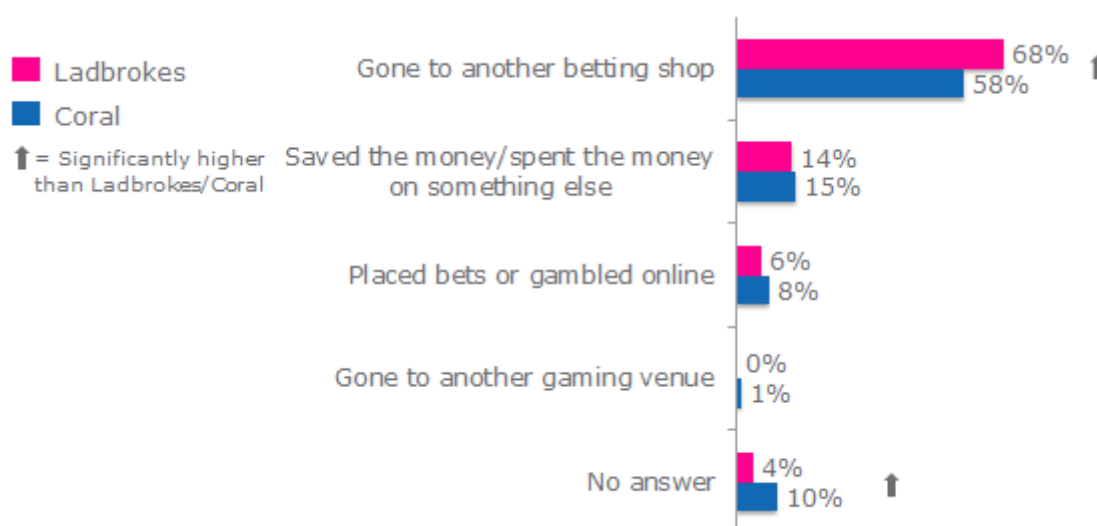
Own party diversion over 50%

Q10. Which other betting shop would you have gone to?

Those who said that they would go to another betting shop of the same brand were then asked what they would do if all of the shops of that brand were closed for refurbishment for 6 months. Again the majority would go to another betting shop, although some would save the money or bet/gamble online. Significantly more Ladbrokes customers would go to another betting shop when compared to Coral customers (68% versus 58%). See Figure 19. Male customers are more likely to go to an alternative betting shop than female customers (66% versus 49%), while female customers are more likely to save their money or spend it on something else than males (27% versus 13%). Older customers are also more likely to visit another betting shop when compared with younger customers (68% of those aged 60+ and 63% of those aged 36-59 versus 54% of those aged 18-35).

Figure 19 – Diversion behaviour (all shops closed for refurbishment for 6 months)

(Base - all who gave the same brand as their alternative LBO if current shop closed for 6 months, Ladbrokes n = 604, Coral n = 479)

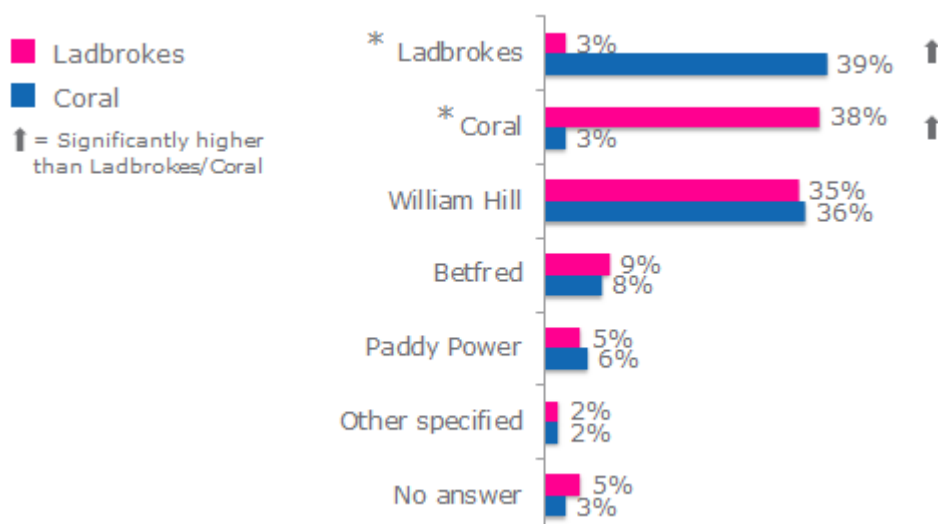


Q11. Now imagine that all [Ladbrokes/Coral] (ask as appropriate) betting shops were closed for refurbishment for 6 months. What would you have done instead of visiting this betting shop today? SINGLE CODE

In the case of not being able to divert to an alternative shop of the same brand, nearly two fifths of those who would go to another betting shop would go to the merger party. Just over a third overall (35%) would go to William Hill. See Figure 20.

Figure 20 – Diversion behaviour: shops diverted to (all shops of brand where survey conducted closed for refurbishment for 6 months)

(Base – all who gave the same brand as their alternative at earlier question and would have gone to another betting shop, Ladbrokes n = 408, Coral n = 277) *Caution: Surveyed shops were all selected from areas where Ladbrokes and Coral compete closely*



* *Diversion to a shop of the same brand due to interviewer error*

Q12. Which other betting shop would you have gone to? SINGLE CODE

The proportion of customers diverting to one of the merger party's betting shops is known as the diversion ratio to the merger party. The survey enables us to calculate two conceptually different versions of these ratios. The first calculates the proportion of survey respondents who said that they would divert to one of the merger party's betting shops if the surveyed shop had been closed for 6 months. These are shown in Table 10. The second calculates the same ratio, but if the customer had been told that all of the betting shops (Ladbrokes or Coral, depending on where their interview took place) had been closed for 6 months. These are shown in Table 11.

Diversion ratios vary widely depending on area although most are above 20%. Some reach 40% or higher.

Table 10 – Diversion ratios by area – Survey betting shop closed for 6 months

(Base - all who would have gone to another betting shop, Ladbrokes n= 1,561, Coral n= 1,470)

Coral	Ladbrokes																	
		Survey LBO closed	TOTAL	AYR	BIRMINGHAM	CHIPPENHAM	COLCHESTER	COVENTRY	DARLINGTON	EDINBURGH	LONDON EC4	LONDON SE12	LONDON SW19	LONDON W1	SKEGNESS	WISBECH	STANLEY	SITRLING
		Survey LBO closed	25%	22%	35%	35%	27%	18%	18%	7%	27%	41%	43%	32%	20%	14%	31%	19%
		Survey LBO closed	25%	17%	43%	21%	22%	22%	46%	19%	12%	49%	13%	14%	47%	9%	16%	35%

Table 11 – Diversion ratios by area – all party's betting shops closed for 6 months

(Base = all who gave the same brand as their alternative and would have gone to another betting shop, Ladbrokes n = 408, Coral n = 277)

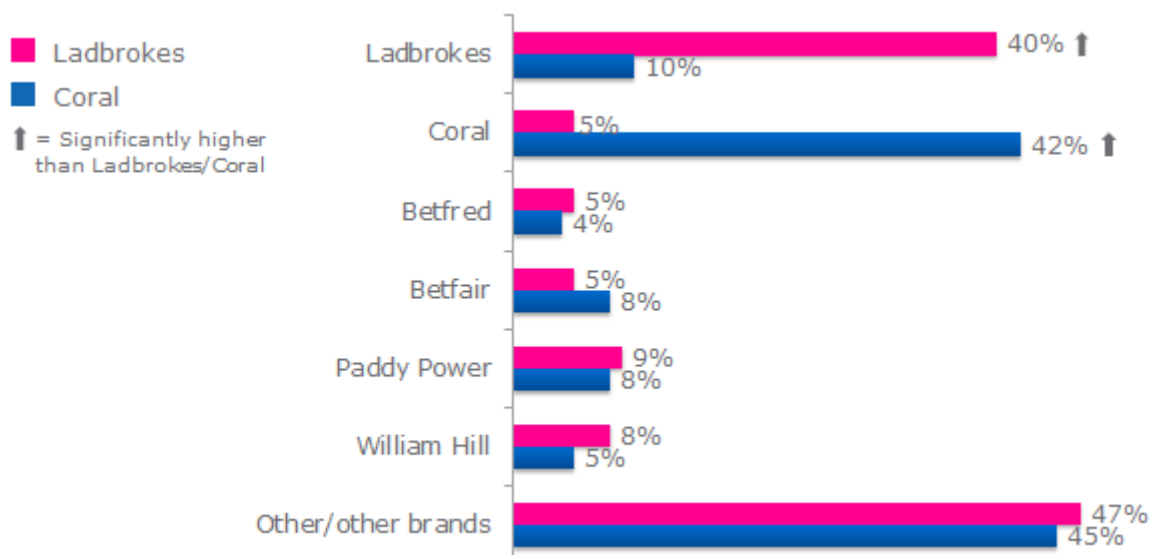
Coral	All party's LBOs closed	35%	27%	54%	27%	41%	28%	63%	20%	19%	58%	25%	24%	51%	26%	23%	36%
Ladbrokes	All party's LBOs closed	37%	40%	49%	38%	63%	27%	55%	8%	29%	51%	55%	38%	36%	37%	34%	25%
		TOTAL	AYR	BIRMINGHAM	CHIPPENHAM	COLCHESTER	COVENTRY	DARLINGTON	EDINBURGH	LONDON EC4	LONDON SE12	LONDON SW19	LONDON W1	SKEGNESS	WISBECH	STANLEY	SITRLING

Diversion ratios are higher in the London area for the Ladbrokes betting shops than the Coral betting shops. See table 12.

For those who stated that they would divert online, Ladbrokes customers are likely to go to the Ladbrokes website (two fifths) and Coral customers would tend to go to the Coral website (just over two fifths). See Figure 21.

Figure 21 – Diversion to websites

(Base – all who would have placed bets or gambled online if the shop was closed for 6 months / if all party's shops were closed for 6 months, Ladbrokes n = 129, Coral n = 183)



Q13. Which website would you have used? SINGLE CODE

8. Appendix

Questionnaire

DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, Cheshire, SK6 7GH
Tel 01663-767857

CMA – Ladbrokes/Coral Customer Survey | JN 3436
QUESTIONNAIRE

I declare that this interview was carried out according to instructions, within the MRS Code of Conduct and that the respondent was not previously known to me.

Interviewer name:		Signature:	
Date and time:		Interview Duration:	minutes

Interview location:

- ☐ Ayr
- ☐ Birmingham
- ☐ Bonnyrigg
- ☐ Chippenham
- ☐ Colchester
- ☐ Coventry
- ☐ Darlington
- ☐ London – East (EC4 postcode)
- ☐ London – South East (SE12 postcode)
- ☐ London – South West (SW19 postcode)
- ☐ London – West (W1 postcode)
- ☐ Skegness
- ☐ Spalding/Wisbech
- ☐ Stanley
- ☐ Stirling

Company:

- ☐ Ladbrokes
- ☐ Coral

Shift time (WRITE IN BELOW):

Start time:

Finish time:

Participant name (Mr/Mrs/Miss/Ms/Other (specify)):

Telephone Number (inc STD Code, where applicable)

Email address

Address

Postcode

Introduction

Good morning/afternoon/evening. My name is (SHOW ID CARD) from DJS Research Ltd, an independent market research company. Today we are carrying out some research on behalf of a Government organisation, the Competition and Markets Authority, about leisure activities. There are no right or wrong answers; we're just looking to understand a bit more about your visit to the licensed betting office today.

Results of this survey are confidential, and you will not be identified personally as having taken part in the survey. Your name and details will not be passed onto any other organisation. Please be assured that this is not a sales exercise.

DJS Research Ltd adheres to the Market Research Society Code of Conduct. If you want to verify that we are a bona fide agency, I can give you the Freephone number of the Market Research Society to ring. GIVE NUMBER IF REQUIRED (+44 (0) 500 396 999).

IF PARTICIPANT ASKS WHO CMA ARE: The CMA is a non-ministerial department that works to promote competition for the benefit of consumers, both within and outside the UK. The aim of the CMA is to make markets work well for consumers, businesses and the economy.

INT NOTE: record respondent's details on the front page for quality control purposes

S1. Do you have 5 to 10 minutes to spare to take part in the survey please?

- ☐ Yes – CONTINUE
☐ No – THANK AND CLOSE

S2. Please could I now ask how old you are? If you prefer to not give an actual age, please could you indicate your age band on this showcard? WRITE IN AND CODE IF POSSIBLE / SHOW CARD A
____ YEARS

0	Under 18 THANK AND CLOSE	<input type="checkbox"/>
1	18-25	<input type="checkbox"/>
2	26 - 35	<input type="checkbox"/>
3	36 – 45	<input type="checkbox"/>
4	46 – 59	<input type="checkbox"/>
5	60 – 69	<input type="checkbox"/>
6	70 – 79	<input type="checkbox"/>
7	80 – 89	<input type="checkbox"/>
8	90 or above	<input type="checkbox"/>
86	Refuse	<input type="checkbox"/>

Survey

ASK ALL

Q1. Which of these, if any, **are you doing/will you be doing/have you done** in this [Ladbrokes/Coral] shop today? SAY TEXT IN BOLD AS APPROPRIATE

SHOW CARD B / CODE ALL THAT APPLY

1	Placing a bet or bets	<input type="checkbox"/>
2	Using the gaming/slot machines	<input type="checkbox"/>
3	Collecting winnings from a previous visit to a [Ladbrokes/Coral] shop	<input type="checkbox"/>
4	Collecting winnings from an on-line bet	<input type="checkbox"/>
5	Purchasing food and/or drink	<input type="checkbox"/>
87	None of these – THANK AND CLOSE	<input type="checkbox"/>

IF NOT CODED 1, 2 OR 5 - THANK AND CLOSE.

ASK ALL

Q2. Which of the following best describes how often you visit this [Ladbrokes/Coral] betting shop? SHOW CARD C / SINGLE CODE

1	Most days	<input type="checkbox"/>
2	2-4 days a week	<input type="checkbox"/>
3	Once a week	<input type="checkbox"/>
4	Once a fortnight	<input type="checkbox"/>
5	Once a month	<input type="checkbox"/>
6	Less than once a month	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>

ASK ALL

Q3. And which of the following best describes how often you visit betting shops in general? SHOW CARD C / SINGLE CODE

1	Most days	<input type="checkbox"/>
2	2-4 days a week	<input type="checkbox"/>
3	Once a week	<input type="checkbox"/>
4	Once a fortnight	<input type="checkbox"/>
5	Once a month	<input type="checkbox"/>
6	Less than once a month	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>

ASK ALL

Q4. Where in this local area did you travel from to get here?

DO NOT READ OUT BUT PROMPT IF NECESSARY “*Did you come here from home, work or somewhere else?*”.

SINGLE CODE

1	Home	<input type="checkbox"/>
2	Workplace in this local area	<input type="checkbox"/>
80	Somewhere else (eg. college/university, station – DO NOT READ OUT EXAMPLES (please specify))	<input type="checkbox"/>
85	Don't know / can't remember	<input type="checkbox"/>

ASK ALL

Q5. Was your visit to [Ladbrokes/Coral] ...?

SHOW CARD D / SINGLE CODE

1	Your only reason for making the trip today	<input type="checkbox"/>
2	Your main reason for making the trip today	<input type="checkbox"/>
3	Not your main reason for making the trip today	<input type="checkbox"/>
85	Don't know (SINGLE CODE)	<input type="checkbox"/>

ASK ALL

Q6. Have you placed bets or gambled online, including via mobile apps, in the last 6 months?

SINGLE CODE

THIS MAY INCLUDE ANY TYPE OF ONLINE GAMBLING, INCLUDING PLACING BETS AND/OR PLAYING GAMES WHERE MONEY CAN BE WON AND ALSO ANY LOTTERY GAME

CLARIFY, IF NEEDED, THAT THIS INCLUDES USING A SMART PHONE OR TABLET, NOT JUST A DESKTOP/LAPTOP.

1	Yes	<input type="checkbox"/>
2	No	<input type="checkbox"/>
85	Don't know (SINGLE CODE)	<input type="checkbox"/>

ASK IF CODE 1 AT Q6

Q6a. Which sites/mobile apps did you use?

DO NOT READ OUT. TICK ALL MENTIONED

1	10Bet	<input type="checkbox"/>
2	32Red Bet	<input type="checkbox"/>
3	888Sport	<input type="checkbox"/>
4	Bet365	<input type="checkbox"/>
5	BetBright	<input type="checkbox"/>
6	Betdaq	<input type="checkbox"/>
7	Betfair	<input type="checkbox"/>
8	BetFred	<input type="checkbox"/>
9	BetVictor	<input type="checkbox"/>
10	Betway	<input type="checkbox"/>
11	Boylesports	<input type="checkbox"/>
12	Bwin party	<input type="checkbox"/>
13	Gala Coral	<input type="checkbox"/>
14	Jackpot Joy	<input type="checkbox"/>
15	Ladbrokes	<input type="checkbox"/>
16	Marathon Bet	<input type="checkbox"/>
17	Matchbook	<input type="checkbox"/>
18	Mecca	<input type="checkbox"/>
19	National Lottery	<input type="checkbox"/>
20	Paddy Power	<input type="checkbox"/>
21	PokerStars / Full Tilt	<input type="checkbox"/>
22	Sky Bet	<input type="checkbox"/>
23	Smarkets	<input type="checkbox"/>
24	Sportingbet	<input type="checkbox"/>
25	Stan James	<input type="checkbox"/>
26	Titan Bet	<input type="checkbox"/>
27	Tombola	<input type="checkbox"/>
28	Totesport	<input type="checkbox"/>
29	Unibet	<input type="checkbox"/>
30	William Hill	<input type="checkbox"/>
31	Winner	<input type="checkbox"/>
80	Other (please specify) _____	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>

ASK IF CODE 1 AT Q6 AND NOT DON'T KNOW AT Q6a

Q6b. Why did you choose this website/these websites?

DO NOT READ OUT / CODE ALL RESPONSES / RECORD FIRST ANSWER AND OTHERS / PROMPT UNTIL CAN'T THINK OF ANYMORE

		<u>SINGLE CODE</u>	<u>MULTI CODE</u>
		<u>FIRST</u>	<u>OTHERS</u>
1	Website design/layout	<input type="checkbox"/>	<input type="checkbox"/>
2	Ease of use	<input type="checkbox"/>	<input type="checkbox"/>
3	Odds offered	<input type="checkbox"/>	<input type="checkbox"/>
4	Concessions offered	<input type="checkbox"/>	<input type="checkbox"/>
5	Range of sports	<input type="checkbox"/>	<input type="checkbox"/>
6	Range of games available	<input type="checkbox"/>	<input type="checkbox"/>
7	Same brand as a shop I use	<input type="checkbox"/>	<input type="checkbox"/>
8	Livestreams offered	<input type="checkbox"/>	<input type="checkbox"/>
80	Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>	<input type="checkbox"/>

ASK IF CODE 1 AT Q1Q7. Did you check odds online when considering whether to place a bet or bets in this betting shop today?
SINGLE CODE

1	Yes	<input type="checkbox"/>
2	No	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>

ASK ALL

Q8. Why did you choose this betting shop today?

DO NOT READ OUT / CODE ALL RESPONSES /RECORD FIRST ANSWER AND OTHERS / PROMPT UNTIL CAN'T THINK OF ANYMORE

		<u>SINGLE CODE</u>	<u>MULTI CODE</u>
		<u>FIRST</u>	<u>OTHERS</u>
	<u>Convenience</u>		
1	Collect winnings	<input type="checkbox"/>	<input type="checkbox"/>
2	Close to my home/work/place I was staying	<input type="checkbox"/>	<input type="checkbox"/>
3	Close to other shops	<input type="checkbox"/>	<input type="checkbox"/>
4	Close to transport link	<input type="checkbox"/>	<input type="checkbox"/>
5	Was passing/first one I came to/happened to be there	<input type="checkbox"/>	<input type="checkbox"/>
6	Easy to get here	<input type="checkbox"/>	<input type="checkbox"/>
7	Easy to park	<input type="checkbox"/>	<input type="checkbox"/>
8	Near public transport stop	<input type="checkbox"/>	<input type="checkbox"/>
	<u>Offering/product range</u>		
9	Wide range of bets available	<input type="checkbox"/>	<input type="checkbox"/>
10	Favourite type/s of gaming machine/s	<input type="checkbox"/>	<input type="checkbox"/>
11	Good odds/prizes	<input type="checkbox"/>	<input type="checkbox"/>
12	Good pay-out ratios	<input type="checkbox"/>	<input type="checkbox"/>
13	Food/drink is good	<input type="checkbox"/>	<input type="checkbox"/>
14	Special promotion/event	<input type="checkbox"/>	<input type="checkbox"/>
	<u>Environment</u>		
15	Attractive premises	<input type="checkbox"/>	<input type="checkbox"/>
16	Convenient opening times	<input type="checkbox"/>	<input type="checkbox"/>
17	Screens/seating good/TV coverage	<input type="checkbox"/>	<input type="checkbox"/>
	<u>Service</u>		
18	Staff are knowledgeable	<input type="checkbox"/>	<input type="checkbox"/>
19	Staff are helpful/personal service	<input type="checkbox"/>	<input type="checkbox"/>
20	Staff are friendly	<input type="checkbox"/>	<input type="checkbox"/>
21	Short waiting times	<input type="checkbox"/>	<input type="checkbox"/>
	<u>Brand/Other</u>		
22	Always come here	<input type="checkbox"/>	<input type="checkbox"/>
23	Friends come here / sociable	<input type="checkbox"/>	<input type="checkbox"/>
24	Only one I know	<input type="checkbox"/>	<input type="checkbox"/>
25	It is my favourite betting shop	<input type="checkbox"/>	<input type="checkbox"/>
26	Part of a chain	<input type="checkbox"/>	<input type="checkbox"/>
27	Can collect online winnings	<input type="checkbox"/>	<input type="checkbox"/>
28	Discrete entrance	<input type="checkbox"/>	<input type="checkbox"/>
80	Other (please specify)_____	<input type="checkbox"/>	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>	<input type="checkbox"/>

ASK IF CODED 25 (IT'S MY FAVOURITE BETTING SHOP) AT Q8

Q8a. Why is it your favourite betting shop? WRITE IN

ASK ALL

Q9. Imagine that this [Ladbrokes/Coral] betting shop was closed for refurbishment for 6 months. Thinking of all the options open to you, what would you have done instead of visiting this betting shop today?

SHOW CARD E / SINGLE CODE

1	Gone to another betting shop GO TO Q10	<input type="checkbox"/>
2	Placed bets or gambled online GO TO Q13	<input type="checkbox"/>
3	Gone to another gaming venue (eg. bingo hall, casino, arcade) GO TO Q14	<input type="checkbox"/>
4	Saved the money or spent it on something else	<input type="checkbox"/>
85	Don't know (SINGLE CODE)	<input type="checkbox"/>

ASK IF CODED 1 (GONE TO ANOTHER BETTING SHOP) AT Q9

Q10. Which other betting shop would you have gone to?

DO NOT PROMPT / RECORD REFERENCE NUMBER BRAND, ADDRESS, OTHER INFORMATION TO HELP IDENTIFY THE SHOP / INTERVIEWER REFER TO BETTING SHOP LOOK UP CARD TO CLARIFY DETAILS (DO NOT SHOW PARTICIPANT) / SINGLE ANSWER

GOING TO ANOTHER BRANCH OF THE SAME CHAIN IS A VALID RESPONSE FOR THIS QUESTION. E.G. CUSTOMERS IN LADBROKES MAY CHOOSE TO GO TO ANOTHER BRANCH OF LADBROKES AND, SIMILARLY, CORAL CUSTOMERS MAY CHOOSE TO GO TO ANOTHER CORAL.

IF CUSTOMER GIVES MORE THAN ONE ANSWER, PROMPT FOR MOST LIKELY OPTION

WRITE IN DETAILS OF BETTING SHOP ON LOOKUP CARD:REF

BRAND

ADDRESS

IF STORE NOT ON LOOKUP/NOT EASILY IDENTIFIABLE FROM LOOKUP:NAME

ADDRESS (AS MUCH DETAIL AS POSSIBLE)

OTHER DETAILS

INTERVIEWER CODE ANSWER TO:

1	William Hill	<input type="checkbox"/>
2	Ladbrokes IF INTERVIEWING IN A LADBROKES SHOP GO TO Q11	<input type="checkbox"/>
3	Coral IF INTERVIEWING IN A CORAL SHOP TO GO Q11	<input type="checkbox"/>
4	Betfred	<input type="checkbox"/>
5	Paddy Power	<input type="checkbox"/>
80	Other (please specify) _____	<input type="checkbox"/>

OR:

85	Don't know (SINGLE CODE)	<input type="checkbox"/>
----	--------------------------	--------------------------

ASK IF CODED A LADBROKES (IF IN LADBROKES) OR A CORAL (IF IN CORAL) AT Q10

Q11. Now imagine that all Ladbrokes/Coral (ask as appropriate) betting shops were closed for refurbishment for 6 months. What would you have done instead of visiting this betting shop today? SHOW CARD F / SINGLE CODE

1	Gone to another betting shop GO TO Q12	<input type="checkbox"/>
2	Placed bets or gambled online GO TO Q13	<input type="checkbox"/>
3	Gone to another gaming venue (eg. bingo hall, casino, arcade) GO TO Q14	<input type="checkbox"/>
4	Saved the money or spent it on something else	<input type="checkbox"/>
85	Don't know (SINGLE CODE)	<input type="checkbox"/>

ASK IF CODED 1 AT Q11

Q12. Which other betting shop would you have gone to?

DO NOT PROMPT / RECORD REFERENCE NUMBER, BRAND AND ADDRESS / INTERVIEWER REFER TO BETTING SHOP LOOK UP CARD TO CLARIFY DETAILS (DO NOT SHOW PARTICIPANT) / SINGLE ANSWER

GOING TO ANOTHER BRANCH OF THE SAME CHAIN **IS NOT** A VALID RESPONSE FOR THIS QUESTION. CUSTOMERS IN LADBROKES **MAY NOT** CHOOSE TO GO TO ANOTHER BRANCH OF LADBROKES AND, SIMILARLY, CORAL CUSTOMERS **MAY NOT** CHOOSE TO GO TO ANOTHER CORAL, AS **ALL** THE SHOPS OF THE SAME BRAND AS THE ONE THE CUSTOMER IS VISITING TODAY ARE CLOSED FOR REFURBISHMENT FOR 6 MONTHS.

IF CUSTOMER GIVES MORE THAN ONE ANSWER, PROMPT FOR MOST LIKELY OPTION

WRITE IN DETAILS OF BETTING SHOP ON LOOKUP CARD:

REF _____

BRAND _____

ADDRESS _____

IF STORE NOT ON LOOKUP/NOT EASILY IDENTIFIABLE FROM LOOKUP:

NAME _____

ADDRESS (AS MUCH DETAIL AS POSSIBLE) _____

OTHER DETAILS _____

INTERVIEWER CODE ANSWER TO:

1	William Hill	<input type="checkbox"/>
2	Ladbrokes	<input type="checkbox"/>
3	Coral	<input type="checkbox"/>
4	Betfred	<input type="checkbox"/>
5	Paddy Power	<input type="checkbox"/>
80	Other (please specify) _____	<input type="checkbox"/>

OR:

85	Don't know (SINGLE CODE)	<input type="checkbox"/>
----	--------------------------	--------------------------

ASK IF CODED 2 (PLACED BETS OR GAMBLLED ONLINE) AT Q9 OR Q11

Q13. Which website/s would you have used?

DO NOT READ OUT. MULTICODE

1	10Bet	<input type="checkbox"/>
2	32Red Bet	<input type="checkbox"/>
3	888Sport	<input type="checkbox"/>
4	Bet365	<input type="checkbox"/>
5	BetBright	<input type="checkbox"/>
6	Betdaq	<input type="checkbox"/>
7	Betfair	<input type="checkbox"/>
8	BetFred	<input type="checkbox"/>
9	BetVictor	<input type="checkbox"/>
10	Betway	<input type="checkbox"/>
11	Boylesports	<input type="checkbox"/>
12	Bwin party	<input type="checkbox"/>
13	Gala Coral	<input type="checkbox"/>
14	Jackpot Joy	<input type="checkbox"/>
15	Ladbrokes	<input type="checkbox"/>
16	Marathon Bet	<input type="checkbox"/>
17	Matchbook	<input type="checkbox"/>
18	National Lottery	<input type="checkbox"/>
19	Mecca	<input type="checkbox"/>
20	Paddy Power	<input type="checkbox"/>
21	PokerStars / Full Tilt	<input type="checkbox"/>
22	Sky Bet	<input type="checkbox"/>
23	Smarkets	<input type="checkbox"/>
24	Sportingbet	<input type="checkbox"/>
25	Stan James	<input type="checkbox"/>
26	Titan Bet	<input type="checkbox"/>
27	Tombola	<input type="checkbox"/>
28	Totesport	<input type="checkbox"/>
29	Unibet	<input type="checkbox"/>
30	William Hill	<input type="checkbox"/>
31	Winner	<input type="checkbox"/>
80	Other (please specify) _____	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>

ASK IF CODED 3 (WOULD HAVE GONE TO ANOTHER GAMING VENUE) AT Q9 OR Q11

Q14. Which other gaming venue/s would you have gone to?

NOTE THAT IN SOME AREAS NO GAMING VENUE LOOKUP SHEET HAS BEEN PROVIDED.

IF A GAMING LOOKUP SHEET FOR Q14 **HAS** BEEN PROVIDED, PLEASE REFER TO THIS TO CLARIFY DETAILS (DO NOT SHOW PARTICIPANT) / SINGLE ANSWER

IF CUSTOMER GIVES MORE THAN ONE ANSWER, PROMPT FOR MOST LIKELY OPTION

WRITE IN DETAILS OF GAMING VENUE ON LOOKUP SHEET (IF APPLICABLE):

REF _____

BRAND _____

ADDRESS _____

IF A GAMING LOOKUP SHEET HAS BEEN PROVIDED BUT THE VENUE MENTIONED IS NOT ON IT, **OR** IF NO GAMING LOOKUP SHEET IS PROVIDED PLEASE RECORD AS MUCH DETAIL AS POSSIBLE BELOW FOR THE ANSWER GIVEN

IF CUSTOMER GIVES MORE THAN ONE ANSWER, PROMPT FOR MOST LIKELY OPTION

NAME OF VENUE _____

ADDRESS (AS MUCH DETAIL AS POSSIBLE) _____

OTHER DETAILS _____

OR

85	Don't know (SINGLE CODE)	<input type="checkbox"/>
----	--------------------------	--------------------------

Demographics

Q15. RECORD GENDER (DO NOT ASK)

1	Male	<input type="checkbox"/>
2	Female	<input type="checkbox"/>

ASK ALL

Q16. How often, if at all, do you use the internet (this could be through any type of device including a smart phone)?

SHOW CARD G. SINGLE CODE

1	Every day	<input type="checkbox"/>
2	5-6 days a week	<input type="checkbox"/>
3	2-4 days a week	<input type="checkbox"/>
4	Once a week	<input type="checkbox"/>
5	Once a fortnight	<input type="checkbox"/>
6	About once a month	<input type="checkbox"/>
7	Less than once a month	<input type="checkbox"/>
8	Never	<input type="checkbox"/>
85	Don't know	<input type="checkbox"/>

ASK ALL

Q17. Which of the following best describes you?

SHOW CARD H / SINGLE CODE

1	I work full-time (30+ hours a week)	<input type="checkbox"/>
2	I work part-time (8-29 hours a week)	<input type="checkbox"/>
3	I work part-time (1-7 hours a week)	<input type="checkbox"/>
4	I am not working – looking for work	<input type="checkbox"/>
5	I am not working – not looking for work	<input type="checkbox"/>
6	I am a full-time student	<input type="checkbox"/>
7	I am a part-time student	<input type="checkbox"/>
8	I am retired	<input type="checkbox"/>
9	I look after family/home	<input type="checkbox"/>
80	Other – please specify _____	<input type="checkbox"/>

INTERVIEWER SAY:

Just to make clear, we described situations to you and asked what you would do only as 'what ifs'. Please be reassured that (Ladbrokes/Coral) have no plans to close all their betting shops for refurbishment for 6 months.

ASK ALL

Q18. Thank you very much for your help - that is the end of the interview. We may be conducting further research on this subject. Would you be willing to be re-contacted in the next 3 months by any of the following about this research if it were necessary?

SHOWCARD I. MULTI CODE

1	Competition and Markets Authority	<input type="checkbox"/>
2	DJS Research Ltd	<input type="checkbox"/>
3	Another market research agency working on behalf of the Competition and Markets Authority	<input type="checkbox"/>
87	None of these (exclusive)	<input type="checkbox"/>

Thank you very much for your time, it is really appreciated by DJS Research and the CMA.

GIVE OUT THANK YOU CARD

INT NOTE: Record participant details on the front page for quality control purposes.

Extract from Interviewer instructions

Dear Interviewer,

Please take some time to read through the instructions below. If you have any questions feel free to give me a call on 01663 761691.

Background

This survey is on behalf of The Competition and Markets Authority (CMA). We are interviewing customers of Ladbrokes and Coral betting shops across the UK.

Please work the shift date and time you have been allocated. The client will have a copy of your working schedule, and the stores have been informed of the times you will be working. The client (or a representative of theirs) may observe the interviewing at any point.

The results will be used to make decisions that could potentially have important consequences for consumers and the two companies mentioned, and so it is key that the survey is followed to the letter and responses are recorded accurately.

The results will be used to make decisions that could potentially have important consequences for consumers and the two companies mentioned, and so it is very important that you read out the introduction and every question EXACTLY as it is written on the questionnaire and responses are recorded accurately. As always please do not lead the participant in any way.

Pack contents:

- Interviewer instructions
- Questionnaires
- Show cards
- Refusal tally sheet
- Betting shop look up sheet
- Retail gaming venue look up sheet (depending on whether there are retail gaming venues in the local area)
- Authorisation letter / email
- Head office contacts
- Site address
- Shift details
- Pay claim
- Reply paid envelopes
- Thank you cards

Methodology

- Approx. 5-10 minute interviews in the betting shops specified.
- You will be interviewing people who are paying for a service in the shop i.e. placing a bet, using the gaming or slot machines, buying a drink etc. If they are only picking up winnings from a previous bet (in-store or online) and not placing another bet they are not eligible, but don't make this assumption without asking the filter question on the questionnaire. The questionnaire relates to this visit only.
- We need a **minimum** of 14 / 15 interviews per shift at Ladbrokes.
- We need a **minimum** of 14 / 15 interviews per shift at Coral.
- **The most important thing is that you cover the shift times and interview in the shop for the full duration of your 6 hour shift.** This is so that we make sure that the interviewing is representative of the different types of people who visit the betting shops at different times of the day.
- You have been sent additional questionnaires so that you can interview as many eligible customers as you are able to within your 6 hour shift.
- Please let your supervisor know immediately after your shift how many interviews you have achieved. Please also inform your supervisor if, for any reason, you were unable to work the full shift.
- Take time to read through the questionnaire when you receive it to make sure you are comfortable with the routing and questions.
- You will need to follow the questionnaire exactly as it is written. Please ensure that everything is filled out correctly and in full.
- When returning your packs please double check your questionnaires and make sure that everything is legible!

Rules for interviewing

If/when the betting shop is busy:

- Please make sure you stand near to/in sight of the entrance and attempt to interview each customer as they leave the shop, irrespective of their age, gender or other characteristics.
- If you are in the process of interviewing a customer when another leaves the shop, approach the next customer who is about to leave the shop after the current interview is concluded.

If/when the betting shop is quiet:

- Please attempt to interview all customers who are in/visiting the shop, irrespective of their age, gender and other characteristics.
- Do not stay just in one part of the shop or interview just one type of customer. You may conduct interviews while customers are waiting for a race, using the gaming machines, having a drink, between placing bets etc, if they are happy to be interviewed.
- In particular, make sure that you interview both customers who are in the shop to bet on sports (horse racing, greyhound racing, football etc.) and those who are there to use the gaming machines (and, where applicable, those who have come in to do both). The

gaming machines are likely to be located in a different part of the shop from where bets are placed.

Permission / Reporting

- The shops / shop managers have been informed of this interviewing project.
- You have been provided with a letter of authority. This also includes a named contact at the head office should they need to be contacted.
- You have been provided with a contact name of somebody at the shop who has been made aware of the research taking place.
- When you arrive to work your shift please follow the store protocol for signing in and observe the information provided for visitors. Please show your letter of authority and your interviewer ID badge.

Where to stand (subject to 'Rules for Interviewing' above)

- Subject to the important 'Rules for Interviewing' above, please agree with the shop manager where you will stand to approach people and to interview them (which might be a different place). It should be inside the shop, not outside. If the shop manager insists on interviewing outside please refer to your supervisor.
- The place where you stand to approach people should be a place where you are not disrupting any of the staff or customers.
- At times when the shop is not busy, please ensure that you approach customers in different parts of the shop i.e. do not focus on the drinks or gaming areas for example; you should therefore be able to approach everyone in the shop and ask if they are willing to take part in an interview.

Refusals

- **Refusals** – please record gender and approximate age of all customers who refuse to take part on the tally sheet provided. This can be done via observation rather than by asking them.
- This is an important part of the survey information and should be kept up throughout every shift.

About the questionnaire and interviewing

- Over 18s only
- **Do not interview people who have already participated in this research – please check with them that they haven't already taken part, and if they have, thank and close.**
- Remember that the accuracy of the tally sheet is important as part of this research
- *Please don't lead the respondents in their responses to questions where the options are unprompted/not to be read out.*

- On the front sheet, please record location and company (Ladbrokes or Coral) using the tick boxes provided, and please also record the start time of your shift and the end time in the box provided.
- **Q1** – if respondents only code 3 or only code 4, you should thank and close. It is key that respondents are spending money in the shop.
- **Q6a and Q13** – we appreciate that this is a long list so please familiarise yourself with the list before starting your shift.
- **Q8** - we appreciate that this list is long, but it's necessary! Please familiarise yourself with the list first so it is easier to find things when they are said by the respondent. Please record first mention (1st column) and all others (2nd column).
- **Questions 10 and 12** - refer to betting shops that are specific to the area that you are interviewing. Please double check when filling in this information that it corresponds with the betting shop lookup sheet you have in your pack. You will need the reference number, name and the address written in as it is shown on the sheet. Please DO NOT show participants this list, it is for your reference only. If you code 'Other' (i.e. a betting shop which is not shown on the lookup sheet, please glean as much information as possible. Ideally name and address but if not anything details such as 'blue store on the high street' or 'the betting shop next to New Look in town' will help us to identify the exact store.
- **Q10** – going to another branch of the same chain is a valid response for this question. e.g. customers in Ladbrokes may choose to go to another branch of Ladbrokes and, similarly, Coral customers may choose to go to another Coral.
- **Q12** – going to another branch of the same chain is **not** a valid response for this question. Customers in Ladbrokes may not choose to go to another branch of Ladbrokes and, similarly, Coral customers may not choose to go to another Coral, as all the shops of the same brand as the one the customer is visiting today are closed for refurbishment for 6 months.
- **Q14** – similar to questions 10 and 12, if there are other gaming venues in the local area, we will provide a lookup sheet to enable you to identify which gaming venue the respondent is referring to. If there are no other gaming venues identified as being in the local area there will be no lookup sheet for this question, but please probe any respondent answering this question for as much detail as possible and record this detail on the questionnaire.

Summary of shift days and times

Time that shift took place	Ladbrokes shifts*	Coral shifts	Total shifts
9am-5pm		2	2
9am-3pm	93	101	194
2pm-8pm	41	42	83
12 noon-6pm	20	18	38
11am-5pm	2	3	5
10am-4pm	26	10	36
3pm-9pm	1		1

*One shift time not recorded

Day of the week shift took place	Ladbrokes shifts	Coral shifts	Total shifts
Monday	25	20	45
Tuesday	23	21	44
Wednesday	29	24	53
Thursday	30	29	59
Friday	22	26	48
Saturday	35	38	73
Sunday	20	18	38

Shops visited

Area	Ladbrokes Address	Coral Address
Ayr	11 RIVER STREET, AYR, KA8 0AX	84 MAIN STREET, AYR, KA8 8EF
Chippenham	6 THE BRIDGE, CHIPPENHAM, SN15 1EX	27-28 27 NEW ROAD, CHIPPENHAM,, SN15 1HS
Darlington	THE GREEN 58 HAUGHTON GREEN, DARLINGTON, DL1 2DF	WHINBUSH WAY, DARLINGTON, DL1 3RR
Birmingham	325 CHESTER ROAD, BIRMINGHAM, B36 0JG	323 CHESTER ROAD, BIRMINGHAM, B36 0JG
Colchester	25 HEAD STREET,	1 HIGH STREET, COLCHESTER, CO1 1DA
Coventry	44 HERTFORD STREET, COVENTRY, CV1 1LF	78-79 78 HERTFORD STREET, COVENTRY, CV1 1LB
Edinburgh	ROSEWELL ROAD, BONNYRIGG, EH19 3PA	10-12 10 POLTON STREET, BONNYRIGG, EH19 3HA
London W1	166 TOTTENHAM COURT ROAD, London W1T 5AJ	THREEWAY, FITZROVIA, LONDON, W11 5DW
London EC4	44 CANNON STREET, LONDON, EC4N6JJ	RETAIL UNIT 74 WATLING STREET, LONDON, EC4M 9BJ
London SE12	347 LEE HIGH ROAD, LONDON, SE12 8RU	10 LEEGATE, LONDON SE128SS
London SW19	SECOND FLOOR SHOP 4 THE BROADWAY, LONDON, SW19 1RF	7-9 7 THE BROADWAY, LONDON, SW19 1PS
Skegness	103 LUMLEY ROAD, SKEGNESS, PE25 3LZ	110 LUMLEY ROAD, SKEGNESS, PE25 3NA
Stanley	50 FRONT STREET, STANLEY, DH90HU	57 FRONT STREET, STANLEY, DH9 OSY
Stirling	FIRST FLOOR RIGHT FIRST FLOOR RIGHT, 25 KING STREET, STIRLING, FK8 1DN	73 MURRAY PLACE, STIRLING, FK8 1AU
Wisbech	59 WISBECH ROAD, WISBECH, PE12 9AQ	47 MARKET PLACE, WISBECH, PE13 1DP



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