Entain

Overview

About Company

Entain plc is a publicly listed international sports betting and gaming company, listed on the London Stock Exchange and a constituent of the FTSE 100. Formerly known as GVC Holdings, the company rebranded to Entain in December 2020. Entain operates a broad portfolio of well-known brands across online and retail betting, including Ladbrokes, Coral, bwin, and partypoker, and is active in sports betting, casino, poker, and gaming products. The group operates in more than 30 regulated or regulating markets worldwide and has a strategic focus on compliance, technology-led innovation, and growth in regulated jurisdictions, including through its joint venture BetMGM in the United States with MGM Resorts International.

Key Holdings and Brands

- **Ladbrokes** - Flagship UK & Ireland retail and online sportsbook
- **Coral** - Major UK sportsbook and gaming brand
- **bwin** - Leading pan-European online sportsbook and casino
- **BetMGM** - U.S. market JV with MGM Resorts International
- **Sportingbet** - Key multi-market international sportsbook
- **Eurobet** - Market-leading Italian sportsbook and gaming brand
- **Neds** - Australia-focused digital sportsbook
- **Gala** - Leading UK bingo and casino brand
- **partypoker** - Global online poker brand
- **PartyCasino** - International online casino brand
- **STOIXIMAN** - Strong Greek sportsbook brand
- **SuperSport** - High-profile sports media-linked betting brand
- **Optibet** - Leading Baltics sportsbook and casino brand
- **Foxy Bingo** - Established UK online bingo brand
- **GiocoDigitale** - Italian online poker and casino brand

Entain operates approximately 35 consumer-facing betting and gaming brands globally, including wholly owned brands and strategic joint ventures.

Global Online Gambling and Betting Market

SOURCE

Valued at approx.
USD 78-95+ B
2024

Projected
USD 153-210+ B
2030

With
CAGR 9.5%-11.9%
(2025–2030)

Online gambling and sports betting remain high-growth sectors, expanding faster than overall entertainment and leisure markets.

Entain's Market Share

SOURCE

- Entain is a top-5 global online gambling and betting operator, part of a group of companies that together hold ~25-30% of global online gambling and betting market share.
- Based on that industry positioning and Entain's scale, its approximate share is ~5-8% of the global online gambling market (estimate)

Entain's Top Competitors

Flutter

kindred

betsson

bet365

DraftKings

Entain

Users and Brand

Revenue Model

Sports Betting

iGaming

Retail Operations

Joint Ventures

User Base

Sports bettors

iGaming users

Omnichannel customers

Entain serves millions of active customers globally across sports betting and iGaming, with tens of millions of registered accounts accumulated across its brand portfolio.

Its user base is diversified by geography and product, with strong positions in the UK, Europe, Australia, and fast-growing exposure to the U.S. market.

Brand Portfolio

Brand / Segment	Region Focus	Primary Activity	Growth Profile
BetMGM	U.S. & North America	Sports betting & iGaming	Rapid growth market (leading JV)
bwin	Continental Europe	Sports betting & online casino	Established; moderate growth
Ladbrokes & Coral	UK & Ireland	Multi-channel sports and casino	Stable legacy portfolio
PartyCasino / PartyPoker / Foxy Bingo	Multi-jurisdiction	Online gaming	Core online entertainment vertical
BetCity	Netherlands	Online sportsbook	Growth via localized license
Sports Interaction	Canada	Online sportsbook & casino	Regional franchise expansion

2024 Annual Report Insights

- Generates £3.7bn Online Net Gaming Revenue (NGR)
- Operates at 74% customer satisfaction score (Group-wide)
- In Brazil SportingBet made:
  - 3× increase in First Time Depositors since 2023
  - +41% Online NGR growth YoY

- bwin is Entain's most geographically diversified pure-online brand
- bwin operates in high-growth, regulated European online betting markets that are expected to outpace the UK in medium-term growth.

bwin.com

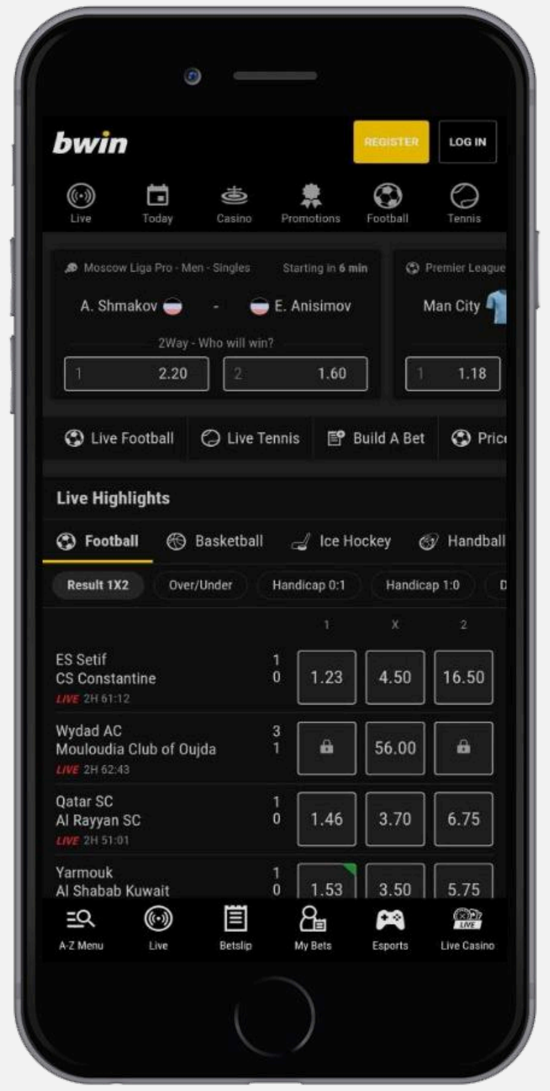
bwin is one of Entain's longest-established and most internationally diversified online-only betting brands, with a strong focus on sports betting, complemented by online casino products.

- Founded: 1997
- Ownership: Entain plc
- Business model: 100% digital (no retail footprint)
- Core identity: Sportsbook-first, pan-European online betting brand
- Strategic role within Entain: Flagship legacy European sportsbook brand outside the UK and US

- bwin operates primarily across regulated European markets, making it Entain's most geographically diversified single online brand.
- Key operating markets include:
  - Germany
  - Italy
  - Spain
  - Austria
  - Portugal
  - France

Total Estimated Downloads
~16 million+

Target Audience



Age 18-45

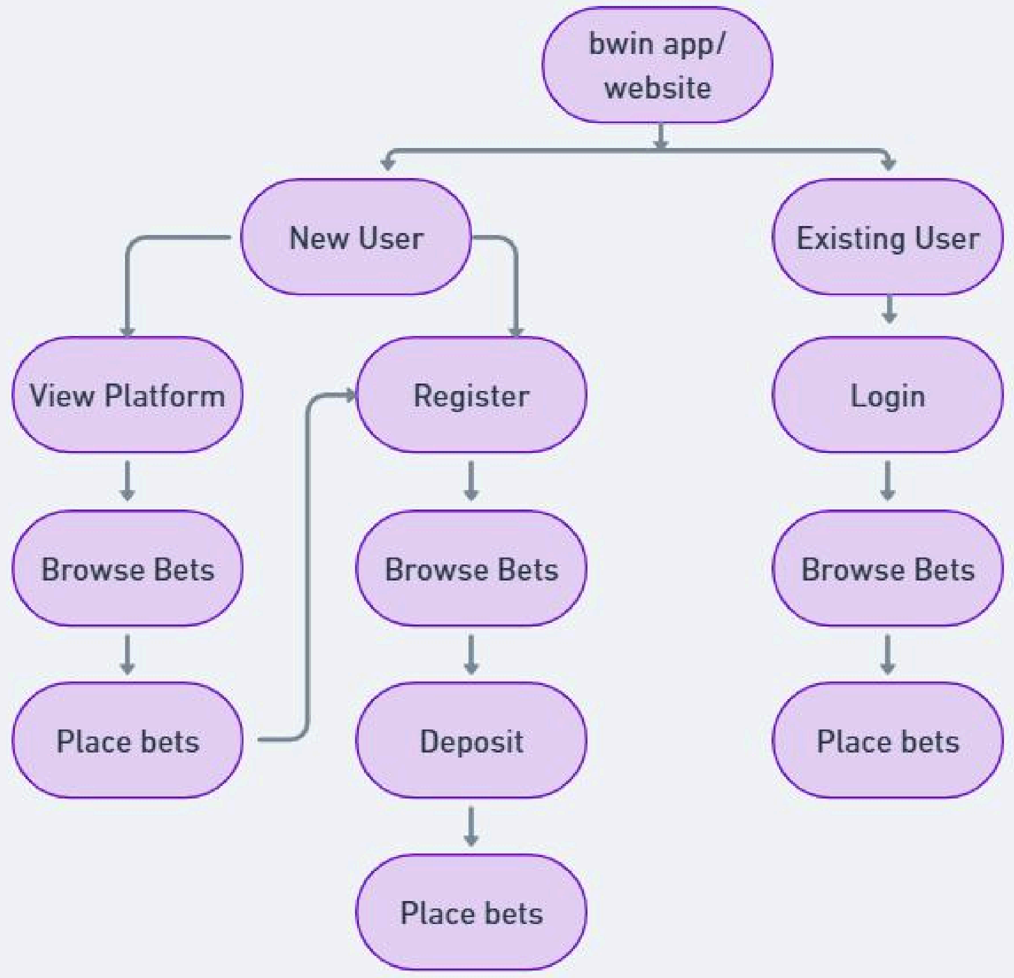
Tech Savvy

Europe

Sports Enthusiastic

User Journey

The bwin user journey differs significantly between first-time and returning users. New users experience a structured, compliance-driven onboarding process focused on registration and verification, while existing users benefit from fast navigation, personalised content, and efficient bet placement, reflecting bwin's focus on experienced, repeat sports bettors.



Pain Points and Observations

User Pain Points

r/sportsbook • 4y ago
TUN3SQUAD
Bwin Withdrawal Issues

r/SoccerBetting • 11y ago
Dizzynha
I'm tired of bwin.

r/gambling • 7y ago
BestSoldier
Bwin is bunch of filthy Scammers

★ October 3, 2025
Stay away, I made the mistake of winning and trying to withdraw my winnings and had to provide more ID documents. They'll take your money and don't like giving it back.

★ June 12, 2025
rubbish to slow

★★ February 19, 2021
Not recommended, app is super slow and unresponsive. Almost impossible to bet in-play due to constantly changing odds and the bets not being accepted.

★★★ March 7, 2023
Too slow the app on the phone, it took me 10mins to make a deposit and place my bet, if you have any last minute choices it is struggling and probably miss to put your bet on time

Doesnt pay out on slots
★☆☆☆☆

Ridiculous minimum bets
★★☆☆☆

SOURCE : Reddit, Playstore, App Store and Trustpilot

Observation

- Withdrawal friction and lack of transparency, leading to severe trust issues
- Slow, unstable app performance, especially during live and last-minute betting
- Unreliable in-play betting experience, with rejected bets and changing odds
- Ineffective customer support, failing to resolve or reassure users
- Perceived unfairness, causing users to accuse the platform of bad intent

Comparing Reviews with Competitors

Platform	Withdrawal Issues	App Performance	Customer Support	Regulatory Issues
bwin	Frequent complaints	Yes	Yes	No
bet365	Some withdrawal/support complaints	App glitches reported	Yes	No
Flutter	Not from app reviews	Not well documented	Not in direct reviews	Responsible gambling failings
Betsson	Repeated complaints	Some app UI complaints	Yes	No

User complaints across major sportsbook apps show recurring issues with withdrawals and customer support. While bet365 maintains strong overall ratings, users still report app stability and support response problems. Betsson attracts more severe criticism around payments and operational trust, whereas Flutter brands face regulatory concerns related to responsible gambling and player safety rather than app performance.

Scope and Feature Analysis

Scope for bwin

Transparency in Withdrawals
Turns the biggest pain point into a trust differentiator

Growing Market
The expanding betting/iGaming industry offers a broad customer base.

Performance-First
Users forgive odds changes but they don't forgive missed bets

Customer Support
Support should calm users, not escalate frustration

Trust Signals at Critical Moments
Silence during money moments = suspicion

'Most Reliable Sportsbook'
bwin doesn't need to be flashier, it needs to be dependable

Problem Statement

Users in the online sports betting market face a lack of trust during critical money-related moments particularly withdrawals, in-play betting, and issue resolution due to poor transparency, unreliable app performance, and inadequate customer support. This leads to frustration, perceived unfairness, and long-term distrust of betting platforms.

WHY? Analysis

Why are users frustrated and distrustful of betting platforms?

Because withdrawals are delayed or blocked. **WHY?**

Because these moments involve real money and users experience unexpected verification requests or bet rejections or app freezes. **WHY?**

Because platforms fail to clearly explain why problems occur. **WHY?**

Because many platforms are designed with a focus on acquisition and betting flow but not on user communication and reassurance at friction points. **WHY?**

Because the industry largely treats withdrawal delays as operational or compliance issues, rather than core user experience problems.

Feature Analysis

Feature	bwin	bet365	Betfair	Betsson
Withdrawal methods	Cards, bank transfer, e-wallets (region-dependent)	Cards, bank transfer, e-wallets	Cards, bank transfer, e-wallets	Cards, bank transfer, e-wallets
Minimum withdrawal	Yes	Yes	Yes	Yes
KYC required	Mandatory	Mandatory	Mandatory	Mandatory
Withdrawal status tracking	Limited / unclear	Clearer status messaging	Moderate	Often unclear
Withdrawal time transparency	Low	Medium	Medium	Low
User trust perception (reviews)	Low	Medium	Medium	Low

Insights

- bwin's withdrawal process is compliant but poorly explained, leading to distrust
- bet365's edge is predictability, not speed. Users know what to expect, which reduces frustration
- Betfair withdrawal friction is often tied to safety systems, not app UX. Trust issues are regulatory rather than transactional
- Betsson suffers from both withdrawal friction and poor communication, making it the weakest performer in perceived fairness

User Persona

User Personas

Cool Alex
24, Content Creator

"As a young, mobile-first bettor, I want to place quick live bets without delays or crashes, so I don't miss key moments during matches"

Spain | Bets socially with friends | Low to medium stakes

Goals
- Quick, easy betting experience
- Bet during live moments
- Entertainment over profit

Frustrations
- App lag during live betting
- Bet rejections at the last moment
- Confusing UI when odds change quickly

Mid Marco
32, Sales Professional

"As an experienced bettor, I want transparent and predictable withdrawals, so I can trust the platform with higher-value bets"

Italy | Bets multiple times per week | Medium to high stakes

Goals
- Reliable platform
- Competitive odds
- Smooth withdrawals

Frustrations
- Withdrawal delays after winning
- Repeated document verification
- Lack of clear timelines for payouts

Daniel
40, Business

"As a trust conscious user, I want clear explanations for verification and withdrawals, so I feel confident and secure using the platform"

Germany | Bets occasionally | Values legitimacy

Goals
- Safe, compliant betting
- Clear rules and limits
- Hassle-free withdrawals

Frustrations
- Sudden account restrictions
- Lack of explanation for verification requests
- Difficulty reaching helpful customer support

Proposed Solutions

Emotionally Intelligent AI Support

An advanced AI-powered support system designed to handle high-stress moments, especially during withdrawals and account disputes, by combining emotional intelligence with real-time transparency.

Features:

- **Emotion Detection:** AI identifies frustration or anger from user tone and behavior
- **Dynamic Escalation:** Automatically routes critical cases to a human Trust Officer
- **Real-Time Transparency Reports:** Shows exactly where funds are held (bank/ intermediary) and why delays occur
- **Context-Aware Responses:** Tailored explanations instead of generic “please wait” messages

Value: Reduces user frustration, rebuilds trust during financial disputes, and prevents negative sentiment from escalating into churn or public backlash

RICE Score $\left(\frac{Reach \times Impact \times Confidence}{Effort}\right)$

RICE Score= $\frac{8 \times 9 \times 7}{8} = 63$

Simplified KYC & “Zero-Knowledge” Verification

A frictionless identity verification system that completes all mandatory checks upfront, eliminating surprises and delays at the withdrawal stage

Features:

- **Biometric Verification:** Face scans and liveness checks for instant identity confirmation
- **OCR-Based ID Scanning:** Auto-reads government IDs to reduce manual errors
- **Pre-Verification Alerts:** Prompts users to complete all checks before placing bets
- **Privacy-First Design:** Stores minimal data while meeting regulatory requirements

Value: Solves the root cause of most withdrawal issues by preventing failed or delayed KYC checks, significantly improving trust and payout success rates

RICE Score $\left(\frac{Reach \times Impact \times Confidence}{Effort}\right)$

RICE Score= $\frac{10 \times 10 \times 9}{7} = 128.57$

Fintech Integration for “One-Tap” Payouts

A modern payout infrastructure powered by fintech partnerships to enable faster, more predictable withdrawals

Features:

- **Instant Payment Rails:** Enables near-instant payouts via debit cards or e-wallets
- **Direct-to-Debit Transfers:** Bypasses slow traditional bank transfers
- **Matched Payment Methods:** Enforces deposit and withdrawal via the same verified method to reduce fraud flags
- **Real-Time Confirmation:** Immediate confirmation when funds are released

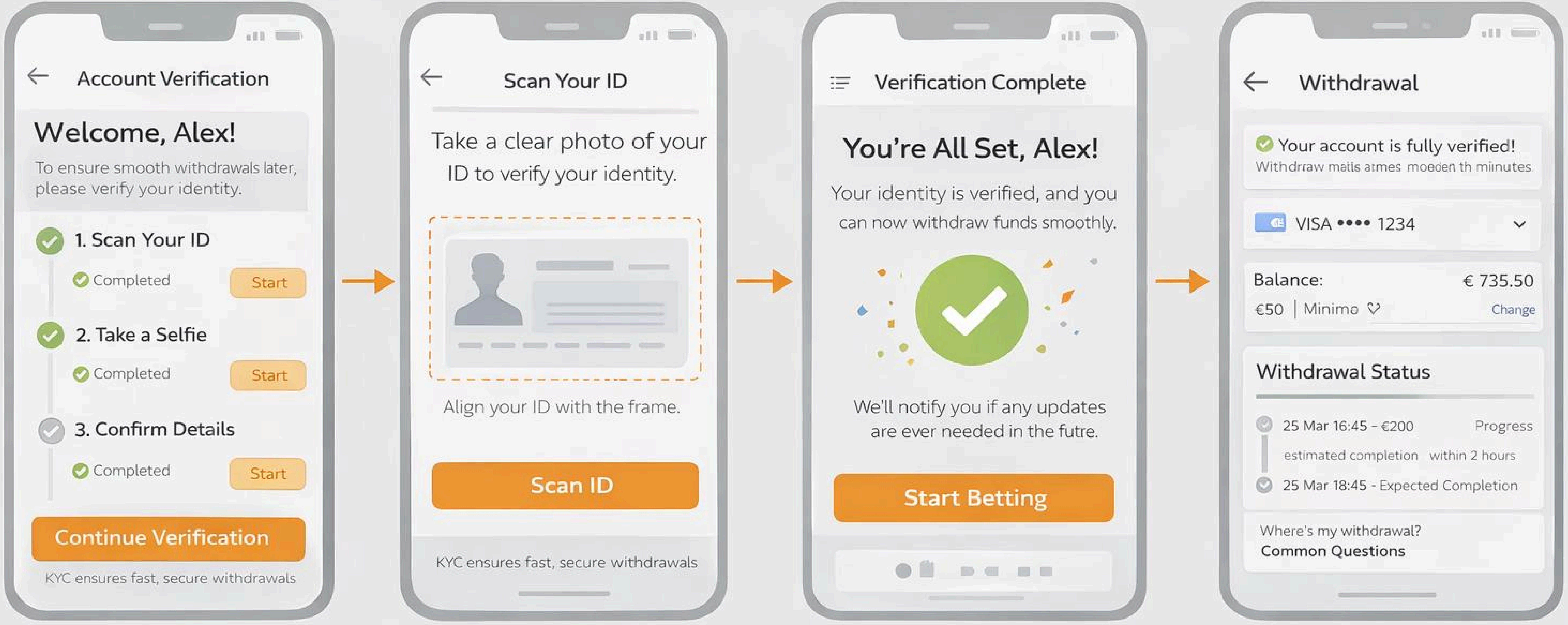
Value: Delivers a premium withdrawal experience by reducing wait times, increasing payout confidence, and improving overall platform satisfaction

RICE Score $\left(\frac{Reach \times Impact \times Confidence}{Effort}\right)$

RICE Score= $\frac{9 \times 9 \times 8}{6} = 106$

Simplified KYC & “Zero-Knowledge” Verification

A frictionless identity verification process to prevent withdrawal surprises later



Clear Pre-Verification Flow | OCR-Based ID Scan | Biometric & Liveness Check | Withdrawal Confidence

*Biometric KYC subject to regional regulation

Entain

Success Metrics

Type	Metric	Why Measure?
North Star	First-Attempt Withdrawal Success Rate	Measures the % of users who can successfully withdraw funds without additional verification or support intervention.
L1 Metric	Pre-Bet KYC Completion Rate	Tracks how many users complete verification before betting, preventing withdrawal failures later.
L1 Metric	Avg. Withdrawal Processing Time	Measures speed and predictability of payouts, strongly tied to user satisfaction and trust.
L2 Metric	Withdrawal-Related Support Tickets	Indicates whether the feature is reducing friction and dependency on customer support.
L2 Metric	KYC Drop-Off Rate	Helps identify friction points in the verification flow that cause users to abandon the process.

Metric	What it means?	Criteria for Success
First-Attempt Withdrawal Success	% of withdrawals completed without extra checks	+25% improvement in 3 months
Avg. Withdrawal Time	Time from request to funds released	< 12 hours
Withdrawal Support Tickets	% of users contacting support for payouts	30% reduction in 3 months
User Trust CSAT	Satisfaction score for KYC & withdrawal flow	≥ 4.5 / 5

DETAILED REPORT