

# Online Bingo Annual Report **2016**



***WhichBingo.co.uk***

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*“The introduction of regulation in the UK has already had considerable impact on the gambling industry and will continue to do so.”*

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# Introduction

With over 400 bingo websites in the UK market and an almost constant stream of TV adverts, we believe it is time for a review of the market.

## Welcome to the WhichBingo Online Bingo Annual Report 2016

According to Gambling Compliance, the UK online gaming market is forecast to pass £3 billion by 2016, with bingo-led gaming estimated to account for around a third of the UK gaming NGR. Being 100% independently owned allows WhichBingo to have a unique vantage point and opinion over the software, the brands, the operators, skin owners and the players that make up what was once, but no longer, seen as gaming's ugly duckling.

## Why a review of 2015?

Summer 2005 became what was seen as the beginnings of the UK online bingo market with Gala and Yahoo launching pay-to-play bingo sites. Whilst there had been others before them, this was considered a pivotal moment for the sector; the big boys were now taking this igaming backwater seriously. Fast forward ten years and there are now over 400 sites in the market and an almost constant stream of bingo advertising on UK TV screens. With major M&A both having happened, and happening, as we go to print, a market sector seemingly at plateau and the effects of POC starting to take full effect, WhichBingo felt it was the right time to take an indepth, independent view of the state of play in the online bingo industry.

## What's in this report?

This inaugural issue of the WhichBingo Online Bingo Annual Report contains an analysis of the year's TV advertising spend by bingo brands, a topline investigation into how the sector is using social media channels, a study on the SEO performance of major bingo brands, an examination of the myriad bingo site launches and closures that have occurred during 2015, and the results of the online bingo industry's largest ever survey of bingo players. The survey takes a closer look at their habits, likes & dislikes and playing

idiosyncrasies with some interesting never-before-reported insights. We also asked a number of the industry's major players for their views on what the sector holds for 2016 and beyond.

## About WhichBingo

Widely recognised as the UK's leading resource for the online bingo player, WhichBingo has, since its UK launch in 2004, been at the forefront of the UK online bingo market. Much more than 'just another super-affiliate' WhichBingo has developed into the online bingo sector's go-to marketing partner, expert in the niche, and the industry stamp of authority with the WhichBingo awards.

WhichBingo is the UK's largest online bingo directory, listing every bingo site in the UK market. WhichBingo first launched in 2000 with the UK-focused site debuting in 2004. The site also runs the online bingo industry's premier awards, the WhichBingo Awards, the ceremony for which, this year, takes place in May in London. The site was named EGR's 'Best Bingo Affiliate 2015' and has previously won awards from iGB, EGR, GaffG and the Online Bingo Summit.

# TV Ad Spend 2015

As any reputable media agency will tell you, TV is still big business, especially in the igaming market. 2015 was no exception with record amounts spent on bingo.

### Top advertisers

From an estimated £56m in media spend on TV for the period December 2014 to November 2015 the top spenders were as shown in figure 1 opposite.

### Highlights

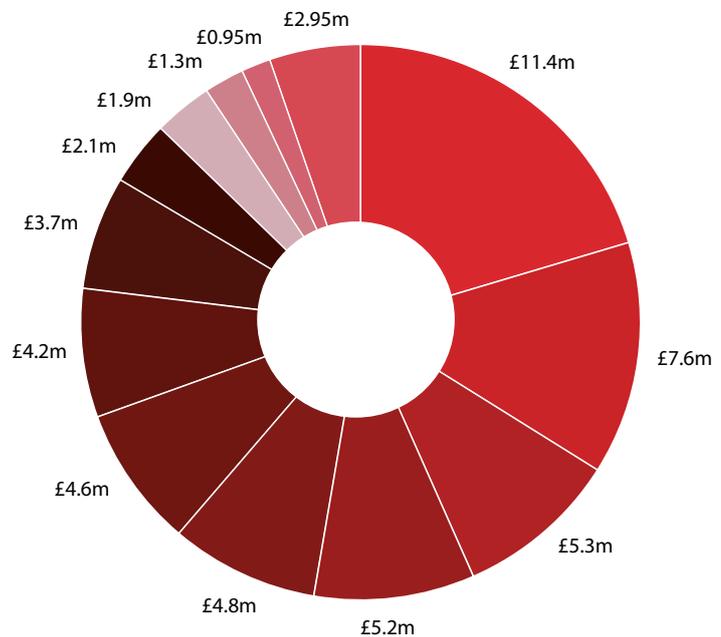
- The top 5 spenders collectively contributed over 60% of all TV advertising spend in 2015
- Winner Bingo spent more on TV (£4.8m) in 2015 than high street giant Mecca Bingo (£3.7m)
- The UK's 3rd largest online gambling brand, Paddy Power (source: EGR Power 50), only spent £0.6m on TV advertising for bingo
- The only bingo affiliate advertising on TV in 2015 was WhichBingo.co.uk

### Analysis

Tombola is undoubtedly the biggest single bingo brand that advertised on TV in 2015, accounting for over 20% of total media spend. Tombola has been a bingo player's favourite for many years and they continue to advertise on TV, often casting real bingo players in their creative ads.

The second biggest spender in 2015 was Gala Coral Group. With both Gala Bingo and Coral Bingo brands in the portfolio it's difficult to apportion the split on media spend, however it would be a safe bet to assume the majority of their £7.6m media spend could be attributed to Gala Bingo. However, with the relaunch of Coral's bingo site in October 2015 and a new TV creative, it would be fair to assume that the spikes in spend for October and November, which accounted for nearly £2m, would be for Coral Bingo.

Figure 1. Top Advertisers - Total spend £56m\*



- Tombola Ltd
- Gala Coral Group Ltd
- Entertaining Play Ltd
- Gamesys
- Winner Bingo
- Cassava Enterprises (Gibraltar) Ltd
- Cashcade Ltd
- Mecca Leisure
- Dream Bingo
- British Sky Broadcasting Ltd
- Bet365 Ltd
- Betway Ltd
- Others

Source: Nielsen

\*Figures quoted are 'value-based' and not necessarily the true amount actually spent

Third and fourth biggest spenders in 2015 were Entertaining Play Ltd and Gamesys which is part of, and made up of, a number of companies under the Gamesys company brand.

Notable bingo brands managed by this group of companies include Jackpotjoy, Sun Bingo, Fabulous Bingo and Heart Bingo to name a few from a list of over 15 bingo brands. Without making assumptions it would be fair to apportion the majority of TV media spend on Sun Bingo and Jackpotjoy.

At number five in the top spenders in TV advertising for 2015 is Winner Bingo at a notable £4.8m. With a rebrand in 2015 and an unlikely (and often quoted 'unwilling') brand ambassador and comedian cast in the TV commercial, Winner Bingo probably spent more individually on TV advertising in 2015 than other brands including Gala, Sun, Mecca or Foxy.

Sixth biggest spender of TV media in 2015 was Cassava Enterprises (Gibraltar) Ltd. It's difficult to identify individual brands from advertisers like Cassava Enterprises with so many brands in their portfolio. A wholly owned subsidiary of 888 Holdings Plc, Cassava Enterprises and their associated group companies can boast the most (UK) bingo brands on the internet. Most notable brands in the stable that have appeared on TV in 2015 include 888 Ladies, Wink Bingo and Costa Bingo to name a few of many.

In at seventh, Cashcade Ltd is the business behind Foxy Bingo although they do have other brands like

*“Winner Bingo probably spent more individually on TV advertising in 2015 than other brands including Gala, Sun, Mecca or Foxy Bingo.”*



Players and CMs Star in Tombola New TV Advert August 25, 2015

Cheeky Bingo and ITV Bingo to name a few, but it would be fair to say that the majority of their spend in 2015 would have been on Foxy Bingo. With a modest rebrand in 2015 and a small change to the fox himself, it's surprising to see Cashcade's investment in TV media spend remains relatively unchanged over the last few years.

Other brands of note that spent big in 2015 include Mecca Bingo with £3.7m, Dream Bingo at £2.1m and Sky Bingo at just under £1.9m.

# SEO Visibility of Bingo Brands

As we go to print, we are seeing additional changes in the Google search ranking algorithms which will make for interesting times ahead for the igaming industry.

The data in this section was collated during December 2015 using a range of search tools provided by Google, SEMrush, Ahrefs and MOZ among others. Some of the data has been consolidated into averages.

## Search volume

The top 15 generic bingo keywords and the top 15 bingo brands searched for in Google in the UK, in December 2015 can be seen in Table 1 and Table 2.

- Gala Bingo, Jackpotjoy and tombola all have the same monthly search volumes in the UK. This correlates with our findings on UK TV ad spend in 2015 on page 6 where these brands are the three biggest spenders in the sector
- In relation to TV ad spend in 2015, Winner Bingo spent c.£4.8m on TV advertising yet fails to make the top 15 searched brand terms
- Each of the top 10 brand search volumes is larger than the highest generic search term 'bingo'
- The word 'free' appears in a third of the top 15 monthly generic bingo-related organic keywords
- Whilst Foxy Bingo is the 6th ranked searched brand term according to Google Adwords Keyword Planner, it ranks 1st for the term 'bingo'. See the next section on 'Bingo' search results (opposite) for the full story.

## Comment

It is interesting to note that the terms that bingo players are searching for is very heavily biased towards brands rather than generic search terms. Indeed, this is so biased towards brand that only the highest searched generic term, 'bingo', gets into the top 15 search volumes. The second highest generic search term, 'bingo sites', is searched even less than the 15th ranked brand term, Heart Bingo.

Table 1 - Top 15 monthly generic bingo-related organic keyword search volumes in the UK

No	Search query	Volume
1	bingo	60,500
2	bingo sites	27,100
3	free bingo	14,800
4	online bingo	12,100
5	no deposit bingo	9,900
6	free bingo no deposit	9,900
7	bingo games	6,600
8	new bingo sites	6,600
9	free bingo games	4,400
10	bingo no deposit	4,400
11	best bingo sites	2,900
12	free bingo sites	2,400
13	bingo online	2,400
14	free no deposit bingo	1,900
15	bingo sites uk	1,900

Table 2 - Top 15 monthly bingo brand organic search volumes in the UK

No	Search query	Volume
1	gala bingo	368,000
2	jackpotjoy	368,000
3	tombola	368,000
4	mecca bingo	246,000
5	sun bingo	201,000
6	foxy bingo	165,000
7	costa bingo	110,000
8	cheeky bingo	74,000
9	sky bingo	74,000
10	wink bingo	74,000
11	fabulous bingo	40,500
12	iceland bingo	40,500
13	paddy power bingo	40,500
14	william hill bingo	40,500
15	heart bingo	33,100

Table 3 - Brands ranking for the term 'bingo' at the end of 2015

No	Brand	Rank +/- Influencing Backlinks	Ranking Links vs Total Links	Site Technical Score	MOZ Root Domain Authority /100	Social Share Count Home URL
1	Foxy Bingo	1000-1500	1.18%	54%	54	1,700
2	Cheeky Bingo	250-500	5.45%	62%	38	64
3	Sky Bingo	250-500	0.01%	53%	36	81
4	Booty Bingo	0-100	0.81%	73%	21	92
5	New Look Bingo	250-500	5.95%	65%	38	28
6	Ladbrokes Bingo	250-500	0.01%	71%	68	58
7	Winner Bingo	100-250	0.01%	78%	54	554
8	Coral Bingo	0-100	0.04%	49%	57	5
9	BGO Bingo	0-100	0.07%	54%	33	743
10	Game Village Bingo	0-100	1.88%	75%	39	0
11	Mirror Bingo	0-100	0.02%	68%	35	53
12	Sun Bingo	100-250	7.31%	62%	29	222
13	Paddy Power Bingo	250-500	0.01%	74%	71	586
14	Costa Bingo	250-500	2.05%	53%	40	2,177
15	Lucky Pants Bingo	0-100	1.54%	59%	16	688

#### 'Bingo' search results

As already stated, the search term 'bingo' is unsurprisingly the highest searched non-brand term in the sector. Google claims to provide answers to what people are searching for and has a view that it can provide the most relevant results to such queries using a variety of signals. In table 3 above we offer some insight into some of these signals and how online bingo brands are working to rank for the term 'bingo'.

*“In relation to TV ad spend in 2015, Winner Bingo spent c.£4.8m on TV advertising yet fails to make the top 15 searched brand terms.”*

#### Key

- Rank - Where a brand ranks on Google for the search query 'bingo'.
- Rank-Influencing Backlinks - Number of backlinks that pass 'rank-enhancing' link equity - Source Ahrefs and MOZ.
- Ranking Links vs Total Links - The percentage of rank-passing links vs the total amount of all inbound links - Source Ahrefs and MOZ.
- Site Technical Score - A generic score based on website design and architecture - Source SEMrush.
- MOZ Domain Authority - A metric based on MOZ scoring system.
- Social Share Count - How often a site URL has been linked to on social media, shared, tweeted etc - Source Ahrefs and MOZ.

# SEO Visibility of Bingo Brands

## Analysis

- Foxy Bingo appears to be ticking all the boxes for Google's 'signals' to rank 1st for the search term 'bingo'
- Foxy Bingo is perceived by Google to have a strong backlinks profile, which is evidently far superior than others and is likely contributing towards their dominance in other 'bingo' related searches
- Foxy Bingo also has a superior social share count and whilst this is not considered to directly enhance rank, it could be contributing to their brand presence on social media which will certainly influence awareness and traffic to their site
- Foxy Bingo's 'MOZ Domain Authority' score is also a stand out signal and they certainly offer more than others in the market although only ranked 4th in this category
- Foxy Bingo's 'Site Technical' score is average and thus offers no reason for search engines to devalue that signal when you consider others in the sector have similar if not better profiles.

## Comment

On further analysis of the metrics we've put together in table 3, on the previous page, we can get a sense of the fundamentals behind SEO and we seemingly acquire a glimpse into the many algorithms that power the Google search rankings and the resultant SERPs for the online bingo market.

There's a clear case that backlinks are influencing rank when it comes to the search term 'bingo' and this is evident in our findings.

Looking at the second and third results for the term 'bingo', does Cheeky Bingo deserve to be above Sky Bingo in a face-off and do they both deserve to be below Foxy Bingo? The answer on face value is yes.

Yet every so often there are anomalies in the system and you can clearly see examples in this table. Booty Bingo, for example, have a less impressive SEO profile according to our research, but they rank for the biggest generic query in the industry.

## Search visibility

Assuming that brands can only target their own name in organic SERPs, the battlefield therefore for additional search exposure occurs in the organic generic bingo terms, of which there are thousands of short and long tail variants. To analyse which brands have the highest visibility or market share in the Google SERPs, we looked at the top 40 generic online bingo search terms and how each of the major brands performed against them. Table 4, below, shows the collated results.

Table 4 - Top 15 online brands with the most visibility in the sector

No	Search Share	Visibility
1	Booty Bingo	34.33%
2	Foxy Bingo	14.85%
3	Cheeky Bingo	11.20%
4	Lucky Pants Bingo	10.33%
5	Game Village Bingo	9.16%
6	New Look Bingo	8.02%
7	Winner Bingo	4.88%
8	Sky Bingo	4.39%
9	Costa Bingo	4.10%
10	Cheers Bingo	2.95%
11	Mecca Bingo	2.06%
12	Paddy Power Bingo	2.04%
13	Gala Bingo	1.92%
14	Coral Bingo	1.83%
15	BGO Bingo	1.33%

- 8 of the top 15 bingo brand searches do not appear in the Top 15 monthly bingo brand organic searches in table 2 on page 8 and only 3 of the top 5 opposite
- Booty Bingo at number 1, interestingly, does not make the top 15 searched brand terms in table 2, see page 8
- Interestingly, Foxy Bingo ranks 2nd for the highest visibility in table 4 opposite and also ranks 1st for the most visible online bingo brand for the search term 'bingo' so we assume they have a fortified SEO strategy
- Notable brands missing from this table but who have high volumes of brand search include Jackpotjoy, tombola and Sun Bingo, and suggests they are failing to tick the boxes of Google's ranking signals (in the previous section)
- Brands like Lucky Pants Bingo, Cheeky Bingo, Foxy Bingo, Booty Bingo and Game Village have an apparent grasp of the most popular industry search queries and techniques.

#### Comment

It would appear that Booty Bingo is getting the highest visibility in the sector because their SEO strategy is targeting more broader bingo search terms than any other online bingo brand. On closer inspection of their strategy and tactics it would appear they acquire link equity from a small number of relevant websites including Live Bingo Network and other similar blogs.

Comparing the amount of ranking links they have (see table 3 on page 9) against others with similar profiles, an obvious difference Booty Bingo has over other online bingo brands is the concentration and relevancy of the links.

*“Foxy Bingo is perceived by Google to have a strong backlinks profile, which is evidently far superior than others and is likely contributing towards their dominance in other 'bingo' related searches.”*

Do large searches for brand names and an apparent lack of SEO present opportunities for Google's recently announced RankBrain AI algorithm to impart negative signals upon a search profile? Brands like Jackpotjoy, tombola and Sun Bingo that heavily invest in TV advertising will arguably create more opportunities for Google searchers to search and bounce – a practice known as 'ping ponging'. Considering the majority of advertising is perceived to be interruptive, TV ads do not always lead to signups straight away and this practice is rumoured to be a clear signal in the Google RankBrain AI algorithm.

With this kind of approach are bingo brands harming their potential to rank when they put more emphasis on TV advertising, for example? Their poor visibility for bingo-related search terms in general leads us to believe that Google does not trust these big spending brands as a 'useful' result or resource for bingo related searches.

# Social Media

According to our research, the online bingo industry is getting social media all wrong. Our research suggests that online bingo brands are tweeting, posting and broadcasting messages several times a day and no one seems to be the slightest bit interested.

It could be said that the online bingo industry and perhaps some other areas of the igaming industry are getting it wrong when it comes to social media for one main reason - brands are just broadcasting messages.

It has long been suggested that measuring the success of any social media marketing activity against the amount of followers, retweets and likes is wrong. What is needed in any social media activity is engagement, and that means conversations. Talking to audiences in any industry requires careful attention to engendering a sense of community and offering something in return for any desired action or outcome. Sadly, this isn't the case in 2015 for most of the online bingo brands we've looked at.

## Social media referrals

The top 10 online bingo brands that had the best referring website traffic from social media in 2015 is shown in Table 1 below.

Table 1 - Social media referral traffic

No	Brand	Overall % of traffic from social *	No. of Facebook fans	No. of Twitter followers	No. of Tweets
1	Sing Bingo	6.91	2554	50	0
2	Mecca Bingo	3.28	103,274	21,000	14,700
3	888 Ladies	3.52	17,380	2,081	4,321
4	Lucky Pants Bingo	3.23	5,363	215	757
5	Winner Bingo	3.34	15,417	975	1,666
6	Landmark Bingo	2.04	170	855	1,548
7	Robin Hood Bingo	2.03	21,596	2,301	2,251
8	Butlers Bingo	1.94	22,855	1,536	1,516
9	Heart Bingo	1.81	8,652	527	1,078
10	tombola Bingo	1.78	99,554	5,153	3,547

Source: Similarweb.com. Data accurate to 13th January 2016.  
\* Figures will include traffic from other social media channels.

## Observations from the top ten

- On average, the total amount of traffic referred from social media channels was 2.98%
- Online bingo brands had on average over 21,800 Facebook fans by the end of 2015
- On average, online bingo brands had 3,469 Twitter followers
- On average, online bingo brands tweeted over 3,000 times a year. That's over 8 tweets per day on average.

## So what about Twitter?

In table 2, opposite, the figures from our Online Bingo Player Census show a core bingo-playing audience aged between 35 to 55+ make up over 80% of those surveyed. If you take that same age range and transpose it over Twitter's demographic data (table 3 opposite) we see that less than half of Twitter users cover the same age range.

Narrowing this down further via our own Online Bingo Player Census data (more on page 14) we see that figure dwindle even further. Our research suggests that only 10% of bingo players surveyed use Twitter regularly.

### Facebook engagement

We've taken a brief look at the two main UK land-based bingo brands Gala Bingo and Mecca Bingo to see how they use Facebook. In December 2015 we found that Mecca posted 13 times on Facebook and Gala 11 times.

### Observations

- On average, a post on Facebook by Mecca Bingo had 17 times more engagement than a post from Gala Bingo
- A Facebook post by Mecca received on average nearly 3.5 times more likes than a post by Gala
- Not one single Facebook post by Gala was shared in December 2015
- Facebook posts by Mecca had 21 times more comments than those by Gala.

Although Mecca Bingo has around 21,000 fewer fans on Facebook than Gala Bingo, the content it posts certainly engages with more of its audience. This boils down to one key factor - user participation. Whereas Gala broadcasts messages to its audience without much in the way of user participation, Mecca appears to tailor its content for fan participation.

Mecca doesn't always get it right though. It also broadcasts game events or promotions now and again and these have little player engagement or interaction. Where it succeeds is when it communicates and engages with players and offers them something in return for an engagement action.

### Final word

In our opinion, the majority of online bingo brands are not getting the results on social media they want because they're too focused on broadcasting rather than engaging with players.

Metrics such as retweets, likes and favorites should be viewed as byproducts of a brand's overall objective, not the sole aim.

Twitter isn't working for the online bingo industry. Across the board, the industry continues to fail in capitalising on valuable user engagement and the

Table 2 - Bingo Player Survey (see page 14 from more details)

Age Range	Percentage
18 - 24	3%
25 - 34	14%
35 - 44	21%
45 - 54	30%
55+	32%

Table 3 - Twitter UK demographic 2015

Age Range	Percentage
15 - 24	30%
25 - 34	24%
35 - 44	24%
45 - 54	16%
55+	7%

Table 4 - Facebook engagement - December 2015

Metrics (Facebook)	Mecca Bingo	Gala Bingo
Fans	102,710	123,747
Posts	13	11
Likes (average)	87	25
Shares (average)	306	0
Comments (average)	168	8
<b>Overall engagement score</b>	<b>561</b>	<b>33</b>

results are showing that too few are using Twitter for what it is - a social community, not a broadcast channel.

For social media to work, brands have to have meaningful conversations with their players that engage with them and offer compelling reasons for them to return.

*“Online bingo brands putting any substantial effort into Twitter are wasting their time.”*

# Online Bingo Player Survey

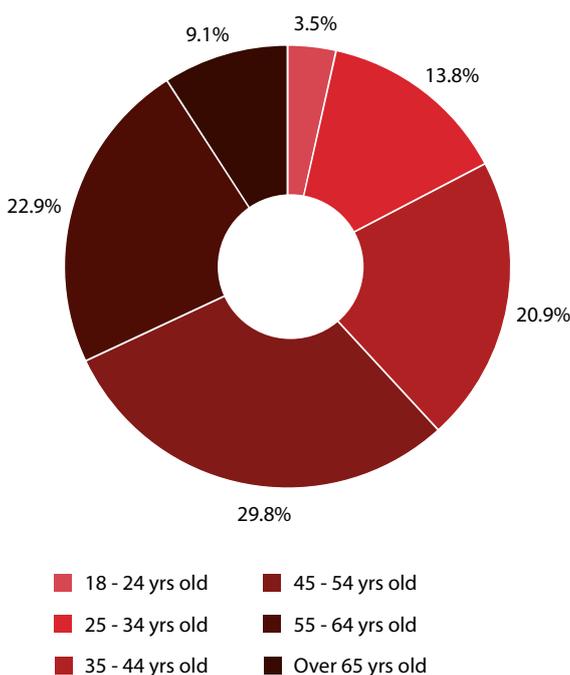
The survey\* looked at UK bingo players' demographics, their spending and playing habits as well as where they play and where they look for support.

## Demographics

Over half of online bingo players in the UK are aged between 35-54. Whilst this positions the market as distinctly 'middle-aged', one must also note that the second largest segment by age are those between 55-64. With this in mind, almost three quarters (73.63%) of those surveyed fall between the ages of 35 and 65 years old. The youngest age group (18 to 24) only accounted for 3.5% of all respondents. Female players accounted for 81% of those surveyed, although the 19% figure for male players does represent an increase of 4% on last year's survey results.

Player promiscuity is well-known in the online bingo market, and this is supported by our data. Almost a quarter of players (22%) are members of more than 10 bingo sites and 1 in 7 are members of more than 15 sites. However, more than half of those surveyed are members of up to only 5 online bingo sites (56%).

## Online Bingo Demographics



How many sites are you a member of?	% of players
No sites	4%
1 - 5 sites	56%
6 - 10 sites	18%
11 - 15 sites	7%
Over 15 sites	15%

## Spending habits

Although player disloyalty is widespread in terms of membership it is interesting to note that almost one in every five players surveyed revealed they had never made a deposit at any online bingo site despite being members of at least one. This could be down to players taking advantage of no deposit sign-up deals and then never going on to become a depositing player. It does point to a huge amount of wastage in player recruitment activity. As can be noted, whilst membership of multiple sites is extensive, actual depositing and playing is spread across fewer sites.

How many sites have you ever deposited at?	% of players surveyed
No sites	18%
1 - 5 sites	55%
6 - 10 sites	14%
11 - 15 sites	4%
Over 15 sites	9%

One would expect players to spend small amounts on bingo sites and this can be seen in our data with more than 40% of players depositing £25 or less per month. However, it is interesting to note that almost the same percentage are spending between £25 and £100. The much sought-after 'whales', those that deposit more than £100 per month, account for just under 20% of the market.

How much do you deposit per month on average?	% of players surveyed
£10 or less	14.5%
£10 - £25	27.7%
£25 - £50	21.3%
£50 - £100	18.5%
More than £100	18%

\*In December 2015, WhichBingo undertook their biggest ever survey of online bingo players. The survey ran for two weeks and received a total of 1,120 responses.

However, when you look at what the players are spending their money on once they have deposited, a huge 40% of players spend their money on slots rather than bingo.

What games do you spend the most money on?	% of players surveyed
Bingo	56.1%
Slots	39.4%
Scratch / Instant Wins	2.6%
Casino / Other	1.9%

### Playing habits

When asked how frequently our respondents played (pay) online bingo, over half said that they play more than once a week, with one in five playing every single day.

How often do you play online bingo for cash?	% of players surveyed
Every day	20.1%
Several times a week	33.4%
About once a week	18.5%
Every once in awhile	26.6%
Never	1.4%

Nearly a quarter of players said that on average they spend in excess of 3 hours playing online bingo in a single sitting. Almost three quarters of players play online bingo for more than an hour at a time and playing between one to two hours at a time was the most popular session length.

How long do you play in one sitting on average?	% of players surveyed
Less than 30 minutes	10.8%
30 mins - 1 hour	15.9%
1 - 2 hours	31.8%
2 - 3 hours	18.4%
3 - 4 hours	9.7%
More than 4 hours	13.4%

### Bingo on the go

Portable devices (laptops, tablets and smartphones) are the most popular devices on which to play online bingo, with the sofa and the bed being the most popular venue. There are not many literally playing 'on-the-go' with only a small percentage playing on the bus, in the car or on the train. Almost as many players admit to playing on the toilet as on public transport!

Do you play bingo in any of the following places?	% of players surveyed
On the sofa	79.4%
In bed	45.1%
At a desk / table	8.9%
On the toilet	7.7%
On the bus	6.3%
In the bath	5.9%
In work	5.5%
In the car	4.3%
On the train	3.7%

Unlike other igaming verticals such as sportsbook, mobile still isn't a big deal according to bingo players. However, more than a quarter of those surveyed did play on multiple devices but more than half still play on desktop and laptop.

What devices do you use to play online bingo?	% of players surveyed
Only desktop	14.5%
Only laptop	39.2%
Only phone	11.3%
Only tablet	8.0%
Multiple devices	27.0%

*“More than a quarter of players said that on average they spend in excess of 3 hours playing online bingo in a single sitting.”*

Contrary to popular industry belief, players who play exclusively on mobile and tablet deposit less than those who play exclusively on desktop and laptop computers.

How much do you deposit per month on average	Desktop & Laptop only players	Mobile & Tablet only players
£10 or less	8.0%	9.0%
£10 - £25	22.0%	27.1%
£25 - £50	22.8%	24.3%
£50 - £100	22.8%	19.7%
More than £100	24.3%	19.9%

### Withdrawals and wagering

Almost a third of all players have never made a withdrawal from an online bingo site, and one in five have attempted to withdraw but been refused. The most common reason for withdrawals being refused were players not meeting wagering requirements.

It is staggering to find that almost 40% of players surveyed said they did not fully understand what wagering requirements were. However this did not stop them depositing and playing at online bingo sites.

	Yes	No
Have you ever made a successful withdrawal?	68%	32%
Have you ever been refused a withdrawal?	18%	82%
Do you know what wagering requirements are?	61%	39%

### Support channels

When asked which channels they would use to contact a bingo site for help, the vast majority of players said they would prefer to use live chat followed by email. Only a quarter of players said they would like to use a phone support line. Only 1 in 10 players said that they would use Facebook to contact a bingo site, whilst hardly any players had a preference for Twitter or any other social channels.

*“Player promiscuity is well-known in the online bingo market, and this is supported by our data.”*

Which channels would you use to contact a bingo site for help?	% of players surveyed
Live chat	63%
Email	53%
Phone	25%
Facebook	13%
Twitter	2%
Other	1%

### Bingo chat rooms

Chat rooms have long been identified as an important factor in bingo players’ choice of sites to play at and this is supported by the research. Four out of five players revealed that they do enjoy interacting with or just watching the bingo chat rooms. However, the split between those actively engaging in chat and those not is almost 50-50. A sizeable 20%, or one in five players, said that they have no interest in chat whatsoever.

Do you take part in online bingo chat rooms?	% of players surveyed
I like to join in with chat	54.3%
I like to watch, but don't chat	26.0%
I've no interest in chat whatsoever	19.7%

### Summary of an ‘average’ bingo player

- Female aged between 45-54
- Is a member of between 1-5 bingo sites
- Deposits between £10-£25 per month on bingo
- Likes to play bingo and slots but doesn't like casino games
- Plays for a couple of hours at a time, several times a week
- Plays bingo at home on the sofa on a laptop
- Prefers to use live chat to contact a bingo site's support team
- Is more likely to engage with a bingo site on Facebook than Twitter
- Likes to participate and chat in bingo rooms

# Bingo Sites and Software

By the end of 2015 there were 416 online bingo sites listed on WhichBingo with UK Gambling Association licences.

We have analysed the number of bingo sites in operation in the UK against the software that powers them. We share which software providers have opened the most skins, which are coming soon and which have closed down. We also look at predictions for 2016 with comment on what might or might not happen.

## New sites

In 2015 there were 59 new online bingo sites launched (see table 1). Unsurprisingly, the most were from Dragonfish, of which 13 were on their own network and another 11 custom skins.

Table 1 - New sites by software provider

Software Provider	No
Dragonfish (888)	24
Cozy Games	16
Jumpman Gaming	12
Playtech / Virtue Fusion	3
Stride / Daub	2
Microgaming	1
Parlay	1
TOTAL	59

Cozy Games continued to launch their fair share of new bingo skins, mostly on their LBN network, whilst relative newcomer Jumpman Gaming is a serious challenger with 11 new sites coming in 2016. Noticeably, Jumpman Gaming's new network "Wheel of Slots" accounted for 50% of their new sites launched in 2015. Parlay launched just one site in 2015, which it subsequently also closed before the year end.

## New sites coming soon

Of the 29 new sites rumoured to be opening in 2016 at time of print (table 2), most notable again is Jumpman Gaming with nearly twice that of nearest rival Dragonfish.

Table 2 - New sites coming soon by software provider

Software Provider	No
Jumpman Gaming	11
Dragonfish (888)	6
Playtech / Virtue Fusion	5
Cozy Games	4
Bede	1
Daub	1
Relax	1
TOTAL	29

## Site closures

In 2015, WhichBingo noted 35 online bingo site closures (table 3), which was smaller than anticipated when the industry feared initial concerns about the new remote gaming duty.

Operators are under more pressure due to the increased cost of compliance and additional betting duties payable. This pressure is deemed to drive some of the merger and acquisition activity that has been seen throughout 2015 with the likes of Paddy Power and Betfair, for example, agreeing terms in late 2015 to the tune of £5bn.

Table 3 - Site closures by software provider

Software Provider	No
Playtech / Virtue Fusion	23
Dragonfish (888)	6
Cozy Games	3
Proprietary	3
TOTAL	35

It would also appear that online bingo sites are in fact not closing down at the rate predicted. Moreover, they appear instead to be changing hands and small independent operators are selling out to bigger players with bigger marketing budgets.

Are these bigger operators simply eradicating the competition by bringing them in-house and quietly sidelining them?

Playtech sites would appear to be a major casualty, however this was simply consolidation after a misjudged mass launch by Bauer Media who consolidated brands into Win Something Bingo.

#### Sites by software

Taking into account the number of sites opened and closed by the end of 2015, by far the most prevalent software provider is still Dragonfish with over 40% of online bingo sites provided by it.

Software Provider	No
Dragonfish (888)	176
Cozy Games	88
Playtech / Virtue Fusion	37
Jumpman Gaming	33
Gamesys	16
Parlay	13
Microgaming	11
Spielo / Gtech	10
Bingo Entertainment	6
Bede	5
White Hat Gaming	5
Stride / Daub	4
Stride / Leapfrog	4
Relax	3
B-Live Gaming	2
Proprietary	2
Probability	1
TOTAL	416

#### Predictions for 2016

Of the current top three online bingo software providers in 2015 (Dragonfish, Cozy Games and Playtech) we predict relative newcomer Jumpman Gaming, with their Wheel of Slots network, to move into this space and push Playtech into fourth place as early as Q2 2016.

News came in at the end of November 2015 that Playtech will be taking over the running of Sun Bingo and Fabulous Bingo from current providers Gamesys. This is likely to happen in August 2016 and we wouldn't be surprised to see other new brands launched from Playtech, although not in the same volumes as Dragonfish, Cozy Games or Jumpman Gaming.

The marketing and management of online bingo skins is nothing new, or anything that difficult to implement these days, but Cheshire-based marketing company 8Ball Games have taken this to another level. With over 50 bingo sites and growing in their portfolio, 8Ball Games, who only started marketing bingo websites in 2013, are one to watch for 2016.

*“Taking into account the number of sites opened and closed by the end of 2015, by far the most prevalent software provider is still Dragonfish.”*

# WhichBingo Award Winners 2015

On Tuesday 9th June 2015, over 200 online bingo industry guests boarded *HMS President 1918* in London for the presentation of the 2015 WhichBingo Awards - sponsored by paysafecard.

Over 14,000 player votes were cast to decide the winners across nine award categories, with an additional award decided for the first time by an expert panel.

2015's WhichBingo Awards had the addition of a 'Most Socially Responsible Bingo Site' category. With a larger prominence being placed on responsible gambling in recent years, a panel of judges formed by industry experts on responsible gambling decided who was worthy of winning this particular award.

**The judges for the Most Socially Responsible Bingo Site award were:**

- Ron Finlay – CEO of the Senet Group
- Stella Dalton – Head of Education and Prevention at GamCare
- Simo Dragicevic – Founder and CEO of Bet Buddy
- Professor Peter Jones – University of Gloucestershire



Jackpotjoy and Gamesys enjoying their wins

## 2015 Award Winners

Award Category	Winner
Best Online Bingo Site	Jackpotjoy
Best New Online Bingo Site	Betway Bingo
Best Online Bingo Chat Team	Jackpotjoy
Best Mobile Bingo Experience	Gala Bingo
Best Boutique Online Bingo Site	Lucky Rainbow Bingo
Best Online Bingo TV Advert	Foxy Bingo - Non Stop Fun
Best Online Bingo Promotion	Jackpotjoy - The Jackpot Hero
Best Unique Bingo Game	Coconut Island - Gala Bingo
Best Online Bingo Software	Gamesys
Most Socially Responsible Bingo Site	Mecca Bingo

## Analysis

Clearly, Jackpotjoy and Gamesys are doing something right, claiming (jointly) 4 of the 10 awards. The combination of award-winning software from Gamesys, an award-winning chat team and best bingo promotion have all contributed to them winning the "Best Online Bingo Site" award.

As reported recently on WhichBingo (November 2015), Jackpotjoy go above and beyond the rest of the industry by showing live (and pre-recorded) chat on a video feed into some of their bingo games. Aply named "Chat-O-Vision", it's no wonder they won the "Best Online Chat Team" award as it certainly seems to be keeping the players coming back for more.

Senior Product Owner Adam Scott from Gamesys said, "For us, it's the biggest deal because the community is the thing that holds our whole site together and these guys [Gamesys team] work tirelessly to make sure that our community is the best and the most vibrant out there, and it feels fantastic to get an award like this off [the players]."

*"The WhichBingo Awards really compliment the Online Bingo Summit. It's the only time we get together every year, so if you're involved in online bingo you've got to be here."*

Head of Customer Operations, Scott Nejrup added, "We're having a fantastic night and we just want to say thank you to everyone who has put the hard graft in throughout the year. This is just a byproduct of what we do day in, day out."

On winning the "Best New Online Bingo Award", Lee Knott, Head of Bingo Operations at Win Technologies, the company behind the Betway Bingo brand said, "It was surprising because we were up against some good guys there. There has been a lot of investment by the board into the Betway Bingo brand. This award proves the effort we're putting behind the bingo product and hopefully we'll see the benefits in terms of revenue in the coming years."



The team behind Betway Bingo

## WhichBingo Awards 2016

The WhichBingo Awards will be back again in 2016 with the player vote followed by an awards event in London taking place on the same day as the annual Bullet Business Online Bingo Summit.

Rob Wheeler from Playtech said at the 2015 awards, "The WhichBingo Awards really compliment the Online Bingo Summit. It's the only time we get together every year, so if you're involved in online bingo you've got to be here."

Dates and venues for these events will be announced soon. To ensure you are one of the first to know, please email [awards@whichbingo.co.uk](mailto:awards@whichbingo.co.uk) to be added to the awards mailing list. For more information about the awards, visit [www.whichbingo.co.uk/awards](http://www.whichbingo.co.uk/awards).

# Industry Predictions 2016

We asked some of the prominent and leading figures in the online bingo industry for their comments and predictions for 2016.



**Darren Sims,**  
Chief Operating Officer,  
Stride Gaming plc

With the ever increasing pace of mobile gaming adoption, 2016 could be the year where mobile replaces desktop as the dominant platform for bingo

play. When moving to mobile, do you try to deliver the same desktop experience or rather provide a watered down version suited for the limited screen of mobile or maybe you go all in for an app?

Different companies will employ different strategies to fit with company goals and targets, but whichever route you choose always keep the player experience top of mind. I predict those that will transition the best will be those companies that offer their core desktop experience within the limits of a mobile offering.



**Daniel Phillips,**  
Chief Operating Officer  
– Bingo Division,  
Playtech plc

In line with the group's omni-channel Playtech ONE strategy, one of the biggest changes we made as a network in 2015 was

the pioneering switch to HTML5-only development. This single code base enables us to build cutting-edge content with more agility, speed and customisable features to allow for greater differentiation. These can be deployed simultaneously to our licensees across multiple channels in record time. This supported our great performance in 2015, and will continue to be a focus for our strategy in 2016. We expect this to become a wider industry trend.

Personalisation and data-enabled analytics software and technology to enable its use will play a larger role in player acquisition and retention in increasingly competitive, regulated markets.

Increased competition will also lead to further market consolidation with smaller players either merging or falling away. The larger brands will continue to flex their ATL spending power focusing on the generally lower CPAs to recruit bingo players.



**Daniel Flesch,**  
Commercial Director,  
Dragonfish

2015 was a landmark year in the UK online bingo market, with the introduction of Point of Consumption tax and regulation. Nevertheless, the

Dragonfish Bingo Network, which conformed and adjusted its platform to the new market conditions in advance, has overseen the launch of 13 new sites during the calendar year, with several more in the pipeline and a steady trend continuing into 2016.

Existing operators look to extract maximum value from their players, in part through the power of cross-sell, while new partners recognised the potential in the market, as presented by the latest figures released from the UK regulator.

2015 heralded the growth of Dragonfish's casino offering, now rebranded CasinoFlex, developed over our award-winning bingo platform. The CasinoFlex product suite enabled both existing and new Dragonfish partners to launch their own, bespoke and fully branded casino/games proposition, across mobile and PC (see Foxycasino.com, Moongames.com, SecretSlots.com). The recent growth shown by our partners' bingo websites has been complemented by the CasinoFlex offering, introducing a growth engine and incremental revenues.

2016 looks like the year of CasinoFlex, with a growing number of prospects looking to enter this booming market, estimated at two billion GBP in the UK alone.



**Garry McGibbon,**  
Head of Player Marketing,  
Mandalay Media

The introduction of regulation in the UK has already had considerable impact on the gambling industry and will continue to do so. The addition

of further rules, in particular with regards to the presentation of offers and marketing, presents a new challenge for online gaming.

However, I believe it is also an opportunity. Firstly, we can use this as a chance to build greater trust with our customers and improve relationships, and secondly we can improve advertising and communications as we move further away from an emphasis on products and offers towards pure brand building. By creating strong brands, we can increase customer loyalty in the process.

We can see some parallels with the alcohol industry which has used regulation and concerns about excess consumption to its advantage. By actively supporting and working with the authorities to tackle any issues, as well as innovative advertising, the UK alcohol industry has gone from strength to strength. Online gaming can take lessons from this and, even in the short term, realise benefits.



**Sreeram Reddy Vanga,**  
Managing Director,  
Cozy Games

The widespread use of handheld devices such as mobile phones and tablets have resulted into tremendous growth of online gambling

companies. There is a rising shift in player traffic towards mobile gaming. According to the Gambling Compliance Research Services (GCRS), online gambling revenues, alone, will probably soar to GBP 3.22 billion in 2016 and mobile revenues would definitely add considerable amounts, as well.

With HTML5 doing wonders, service providers are slowly feeling the pressure of going responsive or launching their own mobile app. With both browser-based and downloadable app versions of our bingo websites, we currently receive 40% of our player traffic from mobile devices and expect this number to rise considerably in 2016.

The bingo market is in flux and it's make or break. To be able to capture the target player base, you need the skill to understand player habits and the acumen to integrate technology to entice them to your offerings. What would prove the mettle of the operators, in the coming times, would definitely be their ability to adapt and improve.



**Adam French,**  
Bingo Operations Manager,  
WilliamHill Bingo

The change in TV advertising rules will have a big impact on what companies push above the line and due to this we will see a change in TV spend strategy and also the offers promoted.

With sign up offers continuing to be fairly generic across the online bingo industry, I think we will see even more variation, in terms of the offers available or towards giving players a choice of sign up offers.

The increase in new lower ball variants will continue to play an important role in the market's direction. Products focused on lower call rates lean favourably towards the mobile market and align with strategies of mobile first which is common practice. This and other developments will be driven from networks but also on a site level with the continued emergence of bespoke development.

Omni-channel will continue to be a key feature of site and product development. Responsive designs to ensure consistent user experiences, as well as products being available across all platforms, will help shape development plans for 2016.

*“The introduction of regulation in the UK has already had considerable impact on the gambling industry and will continue to do so.”*

# Contacts

This Online Bingo Annual Report is created and published by the team at Focus Online Management Ltd which operates and manages the UK's number one online bingo review website WhichBingo.co.uk.

## About this report

The research featured in this report is based on qualitative and semi-structured industry comment conducted in December 2015 unless otherwise stated within. To request additional copies of this report please visit: <http://www.whichbingo.co.uk/reports>

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