

Online Bingo Annual Report 2017



WhichBingo

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“This year’s survey shows strong evidence that the average online bingo player is getting younger.”

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Introduction

12 months ago we published our first ever Online Bingo Annual Review. So, one year forward, here's our data, analysis and opinion on what we've seen in 2016.

Welcome to the WhichBingo Online Bingo Annual Report 2017

2016 was big for the online bingo sector, but 2017 is going to be a bigger year for operators, and one that will be all about survival of the fittest.

There are a number of challenges heading our way – taxation of bonuses, a potential daytime TV advertising ban, increased regulatory review and the on-going scrutiny of digital marketing to name a few. It will be a year where operators will really need to raise their game and those that are bold and make the smart decisions for the long term will prevail.

Data, information, analysis, knowledge and informed comment will be the tools that all operators will need as part of their strategy planning arsenal. And in this, the second WhichBingo Online Bingo Annual Report, you'll find data, analysis and comment from the UK's leading online bingo review site.

What's in this report?

In this issue of the WhichBingo Online Bingo Annual Report, in addition to our own research and analysis we have invited two industry experts to contribute their views and opinions;

Luke Brynley-Jones joins us to give his view on the state of social media in the online bingo industry. Luke is a UK-based social media consultant with over 16 years of industry experience and has spoken at many gaming industry conferences and events.

Fintan Costello also joins us for his view on the landscape of bingo into and beyond 2017, and many will recognise his straight talking approach, if you've ever read his regular column in EGR Intel. Fintan is a renowned gaming marketing expert and internationally noted public speaker. He previously held the role of Senior Industry Head at Google and led the global eGaming team.

Also in this report, we've covered the same subject areas as last year, and added a new section on the 'Usability of Online Bingo Sites', as well as our contributing experts. In line with last year, we've also compiled our in-depth analysis of TV ad spend for the year just gone, together with another topline investigation into how the sector is performing in SEO.

There's also our proprietary online bingo player survey, with some very insightful results. We've taken a look at the number of new bingo sites which opened and closed in 2016, together with comment on how we see this changing in 2017. Finally in this year's report, we've got some new faces and comments in the 'Industry Predictions' section which makes for interesting reading.

About WhichBingo

WhichBingo is widely recognised as the UK's leading resource for the online bingo player, and since its UK launch in 2004, has been at the forefront of the UK online bingo market.

WhichBingo has now developed into the online bingo sector's go-to marketing partner and expert in the niche, with an industry stamp of authority with the annual WhichBingo awards, which was held at the world-famous Madame Tussauds in May 2016.

WhichBingo was named EGR's 'Best Bingo Affiliate' in consecutive years 2015 and 2016. The site was also named the 'Best Bingo Site' in 2016 at the iGB Affiliate Awards and is now the UK's most awarded bingo affiliate website.

TV Ad Spend 2016

Advertising on TV in 2016 appears to have dropped by over £10m compared to figures quoted in 2015, with some notable brands slipping from a top 10 position, whilst others have stopped advertising altogether.

Top 10 brands advertising on TV

From an estimated £45.5m* spent on TV advertising for the period January to December 2016, the top 10 brands are shown in table 1 opposite.

Highlights

- Total value of spend in 2016 for online bingo brands - £45.5m* compared to our reported £56m in 2015.
- Only 19 online bingo brands appear to have advertised on TV in 2016.
- Brands notably absent from advertising on TV in 2016 include Jackpotjoy, Paddy Power Bingo and William Hill Bingo.
- Top 10 brands contributed 95% of all TV ad spend.
- Top 5 brands contributed nearly 80% of all TV ad spend.
- WhichBingo was the only online bingo affiliate advertising on TV in 2016.

Analysis

Tombola appears to have spent £1m more advertising on TV for their bingo brand in 2016 than they did in 2015. This figure now contributes to nearly 29% of the total amount spent by all online bingo brands and operators. Interestingly, they also reputedly spent a notable £3.8m on their new slots brand tombola arcade which launched in 2016.

At position two in the top 10 table, Gala spend is up slightly from £7.6m in 2015 to £8m in 2016. From our sourced figures* they also spent £133k on promoting land-based bingo halls.

Table 1

No.	Brand	Spend £m
1	tombola	12.4
2	Gala Bingo	8.0
3	Mecca Bingo	6.8
4	Foxy Bingo	5.0
5	Sky Bingo	3.9
6	Wink Bingo	2.8
7	Sun Bingo	2.6
8	Costa Bingo	0.9
9	Heart Bingo	0.5
10	Bet365 Bingo	0.5
Total		43.4

Source: Nielsen

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

Gala Bingo's "Galalala" campaign continued to be the focus of their advertising throughout 2016, with the debatable "catchy" tune seemingly capturing the imagination of viewers and players across both TV and digital channels, including impressive viewing figures on YouTube.

Leaping up the table to position 3 is Mecca Bingo who spent significantly more on TV media in 2016 at £6.8m compared to £3.7m in 2015. The supporting creative for their latest (Q4 2016) TV commercial features celebrity Louise Redknapp formerly a member of 90's girl band Eternal, which continues the theme by a number of bingo brands to recruit famous faces.

Foxy Bingo owners Cashcade appear to have spent similar amounts compared to the previous year. In 2016 they spent £4.6m compared to £4.2m in 2015. They also appear to have spent over £300k specifically promoting Towie Bingo, which makes sense as they have previously had specific rooms and occasionally work with cast members from the TV show of the same name in advertising promotions.

Previously in position 10 in 2015, Sky appear to have doubled their TV ad spend for Sky Bingo up from £1.9m to £3.9m in 2016, placing them in the top 5. This spend on media appears to follow a redesign of the site and something of a relaunch that took place in October 2016 that was heralded as the 'Expect Excitement' campaign. This centred around the colour purple which is dominant on the website and the 'one to go' feeling that in this instance centred around the number 7 - a theme which continues on the website.

"Tombola appears to have spent £1m more advertising on TV for their bingo brand in 2016 than they did in 2015."



Louise Redknapp still from Mecca Bingo TV ad, October 2016 "We know the feeling"

The Cassava brands, which include 888 Ladies, Wink and Costa Bingo, appear to have dropped their collective spend in 2016, down from £4.6m in 2015 to £3.7m in 2016. Wink remains in the top 10 biggest brands advertising on TV at a healthy £2.8m.

Sun Bingo appear to have spent a significant amount on TV in 2016 at £2.6m, which coincides with their recent switch from the Gamesys platform to the Playtech Virtue Fusion software in late 2016.

Interestingly, bet365 appear to have dropped their spend on bingo by nearly 50% from £1.3m in 2015 to just over £0.5m in 2016.

Notably absent from 2016 spend on TV is Winner Bingo, previously spending £4.8m in 2015.

Whilst other bingo brands were absent from TV in 2016 including Jackpotjoy, Paddy Power and William Hill, they continued to spend on digital media, but not at the same levels as TV. Interestingly all these brands have been involved in mergers and acquisitions in 2016.

WhichBingo remain the only online bingo affiliate advertising in 2016.

SEO Visibility of Bingo Brands

By the end of 2016 it looks like the majority of the top UK bingo brands have either given up on SEO as a marketing practice or are executing their SEO strategy so badly that it is not succeeding and is simply a waste of time, resource and money.

Or, it could be that smaller, SEO-focused brands are so good at SEO that major brands simply cannot compete with the 'white-hat' only methods that their corporate governance obligates them to use. Major brands in general seemingly are not effecting Google SERPS with their strategies. Apart from Foxy, Gala and Sky none of the other top brands can hold their heads high regarding their SEO performance, according to our research.

Brand search volume

Table 1 shows the top 15 bingo brands searched for in Google in the UK, in December 2016. This gives us a clear indication as to which brands the UK public consider the top bingo brands.

Table 1

No.	Keyword	Volume
1	jackpotjoy	450,000
2	tombola*	408,500
3	gala bingo	368,000
4	mecca bingo	246,000
5	sun bingo	201,000
6	foxy bingo	135,000
7	costa bingo	110,000
8	sky bingo	74,000
9	wink bingo	74,000
10	cheeky bingo	60,500
11	fabulous bingo	49,500
12	ladbrokes bingo	40,500
13	william hill bingo	40,500
14	heart bingo	40,500
15	paddy power bingo	40,500

Observations

- Jackpotjoy has become the most searched bingo brand keyword in 2016 moving ahead of tombola and Gala Bingo.
- Whilst the top five brands have seen stable or even increased numbers of searches in 2016, brands 6-15 have all significantly dropped.
- The general public have not changed their brand preferences compared to last year with 14 of the top 15 brands remaining the same.
- Compared to last year's report Iceland Bingo has been replaced by Ladbrokes Bingo.
- 'tombola bingo' as a search term on its own outranks the majority of brands at 40,500.

Does the lack of change in the public's favourite bingo brand searching mean that marketing is wasted? Or does it prove that brand marketing is working? And how has mobile search effected brand search? Interestingly, Google trends suggests the volume of brand searches are stable year-on-year.

Generic terms search volumes

Table 2 lists the top 15 generic bingo keywords searched for in Google in the UK, in December 2016. This gives us a steer as to what the UK public are looking for when they are searching for bingo products.

Table 2

No.	Keyword	Volume
1	bingo	74,000
2	bingo sites	27,100
3	free bingo	14,800
4	online bingo	12,100
5	bingo games	12,100
6	no deposit bingo	9,900
7	free bingo no deposit	9,900
8	free bingo games	6,600
9	bingo no deposit	6,600
10	new bingo sites	6,600
11	bingo online	2,900
12	best bingo sites	2,900
13	free bingo sites	2,400
14	free no deposit bingo	2,400
15	bingo games free	2,400

Observations

- Four of the top terms include the phrase 'no deposit' and six include the word 'free'.
- Together more than half of the top 15 generic searches relate to either 'free' or 'no deposit' searches.
- Monthly volumes of queries mentioning 'bingo games' has almost doubled compared to the same period last year.
- The top nine brand search volumes are at least equal to, or larger than the term 'bingo'.
- The word 'online' only appears in two of the top 15 searches.
- The top ten generic search terms are the same terms as 12 months ago.

Comment

Is it so surprising to see either 'free' or 'no deposit' included in a majority of the top 15 generic searches, when the playing public is still predominantly looking for offers and freebies? Like the never-ending furniture sales on TV, is the industry guilty of moulding the player's psyche when looking to play online bingo? And if so, is the industry, over a long period of time, guilty of creating an unwanted beast?

The word 'online' only appears in two of the top 15 searches. This points to the playing public believing 'online' bingo to be just 'bingo'. Interestingly whilst mobile play has increased, and mobile-related search volumes have increased, they haven't yet dented the top 15.

“Whilst the top five brands have seen stable or even increased numbers of searches in 2016, brands 6-15 have all significantly dropped.”

Search visibility

We believe the four key search terms 'bingo', 'online bingo', 'bingo sites' and 'mobile bingo' underpin the core search spectrum for the online bingo sector. It should be within the interests of any major online bingo operators to rank for them. Whilst these four terms don't represent the most searched phrases, they are the key foundations for any brand to be successful in the search landscape, in our opinion.

Search visibility, across a range of key terms has to be the overriding target for any bingo brand. We have therefore collated a list of the 15 most visible bingo sites against the top 30 most valuable generic keywords, including our four key search terms, and measured each site's visibility within the top 100 results for each term. See table 3 on page 10.

But it is not enough to simply list these top 15 sites by visibility. We have to understand why they are as successful, or not, as they are. Google's algorithms are so diverse nowadays, there is no longer one single contributing SEO signal that outweighs the collective others.

Therefore we have identified nine key contributing (and correlating) factors and analysed how each brand performs against each one. The nine elements in table 3 are considered to be indications of the integrity of a bingo brand's web presence and best represent ranking signals. For bingo brands to achieve positive results in SERPS, they need to fair well in all of these areas.

Foxybingo.com is the most visible of all bingo sites and generally perform well against the majority of our SEO signals. They have a site-wide SSL, a large number of rank effecting links, and content that allows them to rank for a wide variety of keywords. Indeed their visibility score is more than double the next best site Galabingo.com.

Whilst Galabingo.com appears to have far better numbers across the board, we believe that broader, thin content relating to land based bingo halls (for example) could be diluting their chances of taking the top spot from Foxy.

SEO Visibility of Bingo Brands

Table 3 - Top 15 bingo sites ranked by visibility

No.	Bingo Site	Visibility	Top 4/4	Health	Load	All links	RAL	Keywords	DA	SW SSL
1	foxybingo.com	17.90%	3/4	51%	48%	37,158	1,041	2,040	60	Yes
2	galabingo.com	8.68%	2/4	68%	91%	26,026	1,240	2,611	50	Yes
3	paddypower.com/bingo	8.19%	3/4	69%	68%	20,778	425	406	75	No
4	rocketbingo.co.uk	6.14%	2/4	55%	64%	23,899	93	1,030	35	No
5	bootybingo.com	5.88%	3/4	73%	69%	9,273	112	1,498	23	Yes
6	sunbingo.co.uk	4.11%	2/4	78%	69%	128,881	396	1,808	39	Yes
7	cheersbingo.com	3.99%	2/4	56%	59%	4,613	135	552	32	No
8	comfybingo.com	3.93%	4/4	69%	82%	22,814	111	1,278	26	Yes
9	newlookbingo.com	3.40%	2/4	69%	80%	7,170	508	1,300	45	Yes
10	mummiesbingo.com	3.32%	2/4	72%	80%	17,507	107	1,346	33	Yes
11	luckypantsbingo.com	2.91%	3/4	56%	40%	44,451	290	1,587	34	Yes
12	harrysbingo.co.uk	2.75%	2/4	67%	79%	79,583	346	1,067	46	Yes
13	gonebingo.co.uk	2.66%	4/4	69%	80%	19,765	329	1,913	37	Yes
14	gamevillage.com/bingo	2.10%	4/4	65%	90%	7,050	789	39	49	Yes
15	skybingo.co.uk	1.78%	2/4	59%	78%	6,335,694	265	2,380	42	Yes

Key

- Visibility - An indication of how visible a bingo site fairs in organic search measured against the top 30 generic bingo keywords.
- Top 4/4 - Sites ranking in the top 30 results for bingo, online bingo, bingo sites & mobile bingo.
- Health - Technical analysis and basic architecture score.
- Load - Site load speed average compared on a range of tools including Yslow & Google Pagespeed.
- All Links - An unadulterated snapshot of the site's full link profile. This does not include links that the operator may have included in their own private disavow file.
- RAL - Rank affecting links, which are considered to enhance or hinder a website's search visibility and rankings.
- Keywords - How many keywords a site ranks for within the top 100 results.
- DA - Domain Authority. A score given by MOZ to indicate the strength of a website, mainly focused on the integrity of its link profile.
- SW SSL - Site-wide SSL. Whether or not a site has site-wide SSL certification.

It's evident in our opinion that larger operators are underachieving in SEO, perhaps in their pursuit of alternative marketing methods. Again we see sites like Jackpotjoy.co.uk, tombola.com, Mecca.com and Costabingo.com with poor search visibility scores despite their popularity, and obvious focus on more traditional advertising practices like TV and digital advertising.

Top 4/4

Only Gamevillage.com and Comfybingo.com rank for all four of the top keywords, but all sites do rank for at least half of them. Whilst Gamevillage.com has a 4/4 visibility against these terms, their overall visibility is very low at just 2.10%.

Notably, outside the above list, Mirrorbingo.com, 888ladies.com, Heartbingo.co.uk, BGO Bingo, Bet365Bingo and JackpotJoy.com do not rank for any of the top four keywords and subsequently have low overall visibility.

Site health

We gave each site a technical analysis together with a considered review of their basic architecture, giving us a site-wide 'health score'. Sub domains were treated as a separate site and scanned independently of the operator's main website.

Incredibly the worst scores on our metric were received by some of the biggest bingo sites in the market, namely WilliamHill.com - 48%, tombola.com - 50% and FoxyBingo.com - 51%. These older, larger sites naturally deteriorate, but in our opinion, poor site maintenance practices are evident in our analysis.

Conversely one of the newest sites in the market, thanks to a change in software provider perhaps, is Sunbingo.com which delivered the highest health score within the top 15 most visible brands. However two sites outside the top 15, namely Winnerbingo.com and Fabulousbingo.com, completed the top three most healthy sites, with Winnerbingo.com topping the metric.

Whilst site health does make a contribution to SERPs, our results prove inconclusive.

Site load speed

Across the top 15 sites, load speeds are varied, from the brilliant (91%) to the bad (40%). Highest visibility site Foxybingo.com has the second slowest site load speed, and second ranked site in the list, Galabingo.com, has the fastest load speed. Whilst the second fastest, Gamevillage.com, is only ranked 14th. So really, whilst site load speed may not have a direct correlation with site visibility, it does have a contributing effect, and it is evident that certain operators' sites should perform a lot better.

Perhaps focusing on site load speed as an SEO consideration could see sites gain rank and improve their search visibility. Read more on this topic in our section on The Usability of Bingo Brands on page 20.

All links

In reality, it's no surprise that the gaming industry in general is heavily focussed on inbound links but not necessarily SEO-affecting links, and we can see this through a vast array of inbound links pointing to operators' sites, from tracking links and banners to social media and blog referrals. However volume in itself is not a guaranteed indicator of positive contribution to site visibility. Skybingo.com have an enormous 6m+ links pointing at their site, yet only just sneak into our top 15 most visible sites. Even the second largest volume of links (almost 130,000) only gets Sunbingo.com to position five in our visibility table. When compared to rank affecting links (see below) it is obvious that quality of links far outweighs the volume of links. Indeed, excessive inbound links may have a detrimental effect of rankings.

Rank Affecting Links

The top two most visible bingo sites, Foxybingo.com and Galabingo.com, have far and away more rank affecting links (RALs) than any other sites on our list. It's evident through the results of Foxy Bingo and Gala, that the number of RALs will impact on a site's ability to appear in search results. For these two sites the outcome is positive and between them they rank well for bingo-related searches.

However, as with all of our other contributing SEO signals, there is no longer one single factor that outweighs the collective others. This is clearly shown by the 5th and 6th most visible sites Rocketbingo.com and Bootybingo.com, both having two of the three poorest count on RALs. Indeed Coral.co.uk/bingo and Meccabingo.com, both of which rank outside our top 25 most visible sites, have more RALs than Foxybingo.com and Galabingo.com. However, in general, operators who target RALs, and specifically anchored phrase matches, within their link profile will generally rank better than those that don't.

It's also worth noting that when we filter through the minefield of affiliate and advertising links pointing at bingo sites, operators really need to consider whether these links positively, or negatively affect rank.

Keywords

This metric records the number of different top 100 keyword results each bingo brand appears in. This figure shows the breadth of interest that each brand generates and is an indication of popular searches that each site ranks for. Whilst not appearing in the top 15 most visible bingo sites, both Jackpotjoy.com, with 7,749 and Meccabingo.com with 6,694 different keywords are clearly well ahead of the market. Of those brands appearing in the top 15, unsurprisingly it is the bigger brands like Foxybingo.com, Galabingo.com and Skybingo.com that deliver the best counts in this area.

Domain authority

Domain Authority is a score (on a 100-point scale) developed by Moz.com that predicts how well a website will rank on search engines, and is best used when comparing one site to another. It is mainly focused on the integrity of a site's link profile and is based on three factors: age, popularity and size. The three sites with the highest Domain Authority; Foxybingo.com, Galabingo.com and Paddypower.com/bingo are also the three most visible sites. Perhaps this points to DA having a greater weight on visibility than other factors. Interestingly the top two most visible brands appear to have a greater number of rank effecting links also. DA therefore is a useful guide to the effectiveness of links, or is it simply self-perpetuating, with a site with higher DA garnering better links? However it is worth noting that DA is a 3rd party metric and according to Google, not a search algorithm affecting ranking signal.

Site-wide SSL

As far back as 2014, Google has made it clear that it prefer sites with site-wide SSL certification rather than just checkout or data capture only areas of a website. However as all sites have SSL in some part, it's difficult to see if site-wide SSL, rather than partial, is affecting rank. We must therefore surmise that the level of SSL is inconclusive as a ranking factor in the sector but what is clear however, is that sites with no SSL are not present in even the top 30.

The data presented and commented on this section was collated during December 2016 using search tools provided by Google, SEMrush, Ahrefs and MOZ among others. Some of the data has been consolidated into averages

Social Media

In 2016 we set a challenge for the industry: stop broadcasting sales messages on social media and, instead, focus on driving customer engagement. Unfortunately, the majority of the industry is still pushing too many unwanted promotions and publishing too many links.

On a more positive note, Mecca Bingo, Sky Bingo and tombola, continue to excel in social media and others, including Gala Bingo and Foxy Bingo, have significantly upped their game.

Social networks

Online bingo brands are investing in social media. Within the top ten brands, audiences are up by an average of 40,000 likes on Facebook and 6,000 Twitter followers over the year.

Leading-edge companies are also investing in publishing high quality content across social media, running engaging competitions and taking advantage of advertising opportunities.

While Facebook remains the primary social network for online bingo brands, all but one of the top ten brands are also active on Twitter, though most are simply using it to amplify their Facebook content. Bingo brands are not yet

exploiting influencer engagement on Twitter (or Instagram) or offering dedicated customer support on Twitter.

While seven of the top ten brands on Facebook have Instagram accounts, four of these are inactive and three have no presence at all. Even the leading-edge companies seem to be struggling on the photo and video sharing platform. This may be due to conflicting demographics: the vast majority of Instagram users are under 35 years old.

YouTube is still generally being used as repository for offline video content, rather than a social video channel.

Social media referrals

The most successful online bingo brands on social media seem to have shifted their strategy away from driving referrals to building engagement within the social networks. Facebook fans, especially, don't like leaving Facebook. The platforms should be seen as destinations in themselves, rather than marketing channels.

Table 1 - Social media audience size and referral traffic

No.	Brand	Facebook likes	Twitter followers	You Tube subscribers	Instagram followers	Overall % of traffic from social
1	meccabingo.com	108,000	22,726	364	6,458	4.93%
2	luckypantsbingo.com	6,500	478	21	45	3.21%
3	heartbingo.co.uk	17,500	4,297	50	98	1.96%
4	skybingo.com	28,500	5,334	36	NA	1.56%
5	tombola.co.uk	118,000	7,022	356	1,551	1.51%
6	jackpotjoy.com	121,000	9,981	674	NA	1.30%
7	winkbingo.com	24,500	4,585	811	23	1.01%
8	galabingo.com	136,000	19,932	495	447	0.92%
9	foxybingo.com	44,500	13,357	603	131	0.78%
10	kingjackpot.co.uk	8,500	NA	NA	NA	0.34%

Sources: Similarweb.com. Data accurate to 1st November 2016. Facebook data accurate to 1st December 2016. Twitter data accurate to 3rd January 2017.

Table 2 - Facebook engagement (November 2016)

Brand	No. of likes	% change in fans	No. of posts	Engagements on brand posts	Engagements per posts	Engagements as a % of fans	Most engaging content type
galabingo.com	136,000	1.00%	34	3,372	99	2.50%	Photos
jackpotjoy.com	121,000	NA	NA	NA	NA	NA	NA
tombola.co.uk	118,000	2.00%	50	42,238	835	35.6%	Photos
meccabingo.com	108,000	NA	NA	NA	NA	NA	NA
foxybingo.com	44,500	0.00%	39	1,279	33	NA	Videos
skybingo.com	28,500	0.00%	46	13,613	296	NA	Photos
winkbingo.com	24,500	NA	NA	NA	NA	NA	NA
heartbingo.co.uk	17,500	NA	NA	NA	NA	NA	NA
kingjackpot.co.uk	8,500	0.00%	4	4	1	NA	Photos
luckypantsbingo.com	6,500	0.00%	91	313	3	NA	Links

Source: Simply Measured, November 2016 (not all statistics publicly available)

Perhaps reflecting this, 2016 saw a reduction in traffic referred to online bingo sites from social media: last year just 1.38% of site traffic came from social channels, down from 2.98% in 2015.

Social media engagement

November 2016, below, shows what can be achieved when brands focus on publishing high-quality, engaging content. Tombola's 50 Facebook posts during the month drove over 40,000 interactions from fans, boasting a massive 35.6% engagement rate: ten times the average on Facebook.

Gala Bingo's improvement is also worth highlighting. In our comparison with Mecca last year, Gala received just 33 engagements on 11 Facebook posts in December 2015 (versus 561 engagements from 13 posts for Mecca). This November, Gala attracted 3,372 engagements on 34 posts: a dramatic upturn.

At the lower end of the top ten brands, listed by Likes, companies are clearly struggling to reach their audience. With organic post reach for most Facebook company pages now below 5% of fans, a tactical advertising budget is essential. Without advertising and a healthy dose of creative content these brands are unlikely to make any progress.

Photos are statistically the most engaged content type, but this is largely due to the lack of bespoke video content published. When video is used creatively, engagement exceeds all other formats

A final word

While the larger players in the industry have upped their game, too many online bingo companies are still failing to use social media effectively.

Our recommendations for 2017 are to invest in better content, use tactical advertising, experiment with influencer marketing on Twitter and Instagram and, once again, stop pushing endless offers into fans feeds, just to get your social signals out to Google!

In 2017 we predict an increase in the use of bespoke social video content on Facebook, especially for competitions. We also see a growing opportunity for brands to experiment with messaging, perhaps using Whatsapp or Facebook Messenger to create customer service channels that, in due course, are likely to provide 'push' marketing opportunities.

“While the larger players have upped their game, too many online bingo companies are still failing to use social media effectively.”

Author contribution

The Social Media comment in this report has been written by Luke Brynley-Jones, who is a UK-based social media consultant with over 16 years of industry experience. His clients have included British Airways, Burger King, The Daily Telegraph and VISA. He is currently Managing Director at OST (<http://ostmarketing.com>), an award-winning digital marketing agency whose clients include Sun-Pat Peanut Butter, Hartley's Jelly, The Open University and Crufts.

Online Bingo Player Survey

Our 2016 survey* again looked at UK bingo players' spending and playing habits, which reveals some interesting trends compared to previous results.

Demographics

This year's survey shows strong evidence that the average online bingo player is getting younger. Previously the dominant age range was 45-54, but in the past 12 months we've seen 20% increases in both 25-34 and 35-44 year olds, with all of the older age groups falling slightly as a result. The youngest age group (18-24) saw almost no change at all, but only accounted for less than 4% of respondents. Female players accounted for 82% of those surveyed, a small increase of 1% on last year's survey results.

Age range	% of players
18-24	3.6%
25-34	16.9%
35-44	26%
45-54	26.2%
55-64	20.9%
65+	6.4%

Player loyalty appears to be on the decline, with figures showing a 20% drop in the number of players who are members of between only 1-5 sites. Last year this group accounted for over half of all bingo players (56%) but now that figure is only 45%. Almost one-fifth (18%) of players stated they were members of more than 16 bingo sites, an increase of 3% on the previous year.

“Mobile play increases by more than 100% as online bingo starts attracting a younger audience.”

How many sites are you a member of?	% of players
No sites	8%
1 - 5 sites	45%
6 - 10 sites	19%
11 - 15 sites	8%
16+ sites	18%

Spending habits

Just as we reported in last year's survey, whilst membership of multiple sites is widespread, actual deposits are spread across fewer sites. 60% of players surveyed stated they only deposited cash at between 1-5 different brands. This could be down to players taking advantage of no deposit sign-up deals and then not depositing after they've used their free bonuses.

How many sites have you ever deposited at?	% of players
No sites	4%
1 - 5 sites	60%
6 - 10 sites	19%
11 - 15 sites	7%
16+ sites	10%

Almost half of all players surveyed (49.7%) said they spend between £10 and £50 per month. However, there is still a significant proportion of 'whales' (21.3%) who admit to depositing upwards of £100 each month at online bingo sites. It should come as no surprise that the high roller players spend most of their money on slots rather than bingo games.

How much do you deposit per month on average?	% of players
£10 or less	10.4%
£10 - £25	25.6%
£25 - £50	24.1%
£50 - £100	18.6%
More than £100	12.3%

*Survey of WhichBingo.co.uk visitors, December 2016. The survey received a total of 606 responses

This year we've seen slots overtake bingo for the first time in regards to where the majority of player spend is taking place. Last year 50% of players spent the most of their money of bingo games, with slots at 45%, but this year those figures have reversed.

What games do you spend the most money on?	% of players
Slots	50%
Bingo	45%
Casino / Other	3%
Scratch / Instant Wins	2%

The rise of mobile

The most striking data from this year's survey has been the dramatic increase in players playing via their mobile phone. Phone usage increased by more than 100% in the past 12 months and is now the most popular single device used to play bingo amongst those surveyed.

What devices do you use to play online bingo? (multiple choice)	% of players
Phone	58%
Laptop	46%
Tablet	34%
Desktop	16%

Our survey also revealed that almost half of all player (42%) used multiple devices to play, but even amongst those who only use one type of device, mobile was again the most popular.

What devices do you use to play online bingo?	% of players
Only phone	24%
Only laptop	20%
Only tablet	10%
Only desktop	4%
Multiple devices	42%

Our survey discovered that most mobile and tablet play is done via the web browser rather than a downloaded app. This could indicate a general reluctance by bingo players to download apps to their device, or it could reflect the lack of apps available, especially on Android devices where the Google Play Store forbids real money gambling apps.

When playing bingo on your mobile or tablet, do you...	% of players
Login via web browser	62%
Login via downloaded app	12%
Both of the above	26%

Of those players who don't use mobile, almost a third said the small screen size was a main reason why they did not play on phone.

Why don't you play bingo on a mobile or tablet? (multiple choice)	% of players
Screen is too small	29%
I don't own a mobile / tablet	17%
I tried it but didn't like the experience	15%
I can't play my favourite game(s)	13%
I'm on pay as you go	9%
I use my device for other things when I play	8%
It's difficult to chat	8%
I'm worried about data usage	7%
My device isn't powerful enough	6%
I'm worried about battery life	1%

“The most striking data from this year's survey has been the dramatic increase in players playing via their mobile phone.”

Online Bingo Player Survey

Withdrawals and wagering

82% of players surveyed said that they have made a successful cash withdrawal from an online bingo site in the past, with only 18% stating they've never managed to do so. 17% of players admitted they had been refused a withdrawal in the past, with the most common reason for this being failure to meet wagering requirements.

	Yes	No
Have you ever made a successful withdrawal?	82%	18%
Have you ever been refused a withdrawal?	17%	83%
Do you know what wagering requirements are?	74%	26%

1 in 4 players said they either didn't understand, or weren't 100% sure what wagering requirements were. However, when asked to choose between receiving a bonus with wagering attached, or no bonus and no wagering attached, most were in favour of getting a bonus, despite the wagering that may be required to withdraw any winnings.

Which would you prefer?	% of players
Receive a bonus, even if it means some wagering requirements	62%
Receive no bonus if it means no wagering requirements	38%

Playing habits

The survey participants appear to be extremely active players, with more than 80% of respondents claiming to play bingo at least once a week or more. Almost a third of players admit to playing every single day.

How often do you play online bingo for cash?	% of players
Never	0.9%
Every day	30.3%
About once a week	22.3%
Several times a week	31.3%
Every once in a while	15.2%

In regards to time spent playing bingo, over half play on average between 1-3 hours in a single sitting. 1 in 10 play for an incredible 4 hours or more in a single sitting.

How long do you play in one sitting on average?	% of players
Less than 30 minutes	5%
30 mins - 1 hour	19%
1 - 2 hours	35%
2 - 3 hours	20%
3 - 4 hours	10%
More than 4 hours	11%

When it comes to other online gambling activities, online bingo players have a huge affinity with slot games. Two-thirds of players surveyed said they also played slots, with the same amount stating they like to play both at the same time. Sports betting and casino games were the least popular gambling activities amongst those surveyed.

Have you ever played the following for real money?	% of players
Slots	67%
Scratch / Instant Wins	43%
Lottery	37%
Sports Betting (Horses)	20%
Roulette	16%
Blackjack	14%
Sports Betting (other)	13%

“1 in 4 players said they either didn't understand or weren't 100% sure what wagering requirements were.”

Player psychology

In this year's survey we asked, "would you describe yourself as a gambler?" We were surprised when almost half of those surveyed said 'No'. It is up for debate as to why players feel this way, but one theory is that for many, online bingo is not played simply to win money, but for entertainment, chat and a bit of fun.

The fact that 50% of all players surveyed don't actually withdraw their winnings, but continue playing, could back up this theory. When it comes to prize money, three out of four players prefer smaller prize money with a bigger chance to win, rather than large jackpots with a smaller chance to win.

	Yes	No
Would you describe yourself as a gambler?	53%	47%

What do you do with prize winnings?	% of players
Withdraw the winnings	50%
Keep playing with the winnings	50%

"In regards to time spent playing bingo, over half play on average between 1-3 hours in a single sitting."

Bingo chat rooms

Chat rooms are known to be an important feature of any online bingo site, but our research shows that participation in chat is on the decline.

Only 30% of players like to actively join in with chat, down on 51% from last year. Likewise, the number of players who have no interest at all in chat has gone up from 24% to 32%. The remaining 38% don't take part in chat, but they do like to watch.

Do you take part in online bingo chat rooms?	% of players
I like to join in with chat	30%
I like to watch, but don't chat	38%
I've no interest in chat whatsoever	32%

Key Findings

- The average age of online bingo players is getting younger.
- Half of all players use multiple devices to play, with mobile phone now the most popular.
- Player promiscuity is prevalent, but the majority of players are loyal to just a few brands.
- Half of all players spend on average between £10-£50 per month, with one in five spending in excess of £100 per month.
- Almost half of all bingo players don't consider themselves to be gamblers.

Bingo Sites and Software

2016 saw the number of active licensed UK online bingo sites listed on WhichBingo rise to an all time high of 437.

WhichBingo continues to compile the only comprehensive directory of all online bingo sites in the UK and the data it provides is fascinating. We maintain data on all the sites that open and close, including who provides the bingo software they run on.

New bingo sites

During 2016 we saw 51 new online bingo sites open for business (see table 1), just eight short from the 59 new online bingo sites that opened in 2015. Once again Dragonfish topped the list as the most popular option for new operators.

Cozy continues to bite at its heels, however, as the closest competitor, with Jumpman Gaming and Playtech / Virtue Fusion bringing up the rear.

Table 1 – New online bingo sites opened in 2016 by software provider

Software Provider	No.
Dragonfish	24
Cozy	18
Jumpman Gaming	5
Playtech / Virtue Fusion	3
Daub	1
TOTAL	51

“20 sites closed for business during 2016, although some have re-opened on different platforms.”

Analysis

This year Microgaming and Parlay are notable absentees from the list of software providers launching new online bingo sites in 2016. They both launched one each in 2015.

At the end of 2015 we predicted that Jumpman Gaming would be more prolific and be a serious challenger to the top two established platforms. However, nine of the sites listed as ‘Coming Soon’ at the end of 2015 and in early 2016 failed to make it to market. It’s worth noting that three of the five new sites launched by Jumpman Gaming are on their Wheel of Slots Network which, according to their website “...is a standalone network of bingo-led sites using proprietary software from Jumpman Gaming.”

The continued dominance of Dragonfish confounds popular opinion, since the amendments to its bonus terms and conditions meaning, (from what we understand) that all winnings from both bingo and instant games go to bonus until wagering is cleared. Not so long ago, every new site that opened on Dragonfish would see an influx of players keen to take advantage of the decent bonuses on offer, knowing that they could forfeit their bonus to withdraw any winnings.

New sites coming soon

Of the 29 sites we anticipated would open early in 2016, over half never made it including those nine Jumpman Gaming sites previously mentioned.

The launch of new Ignite bingo brands appear to have been scaled back, as do those from Daub. As we understand it, Daub seem to have put their plans on hold following the recent acquisition activity of parent company Stride Plc, bringing onboard Tarco (Netboost) and 8Ball Games.

The ever changing regulatory environment does not appear to be slowing the expectations of many operators, and we're seeing a strong list of names for new online bingo sites we expect to see open early in 2017.

Table 2 - New online bingo sites 'coming soon' by software provider

Software Provider	No.
Dragonfish	7
Jumpman	2
Cozy	1

Of course, many operators play their cards very close to their chest, so there could be many more sites on the drawing board that we are yet to learn about.

Site closures

20 sites closed for business during 2016, although some have re-opened on different platforms after a short break. Others may also be born again in the same way as GTECH/IGT who have pulled out of the bingo market, but the domains are gradually reappearing with new software behind them.

The industry is bearing up well to the financial strains being placed upon it by continued taxation changes and reviews into the terms and conditions imposed.

Further taxation commences in August 2017 based on free bonus and bets and it remains to be seen what impact this might have on the welcome offers it is viable to promote (and what effect this might have on player numbers and hence product profitability).

Table 3 - Online bingo site closures by software provider

Software Provider	No.
GTECH / IGT	6
Dragonfish	6
Cozy	3
Playtech / Virtue Fusion	3
Parlay	2

Sites by software

A high profile movement in 2016 was News International taking Sun Bingo and Fabulous Bingo over to Playtech from Gamesys.

Contrary to expectations the anticipated number of new Jumpman Gaming openings did not materialise in full and so the top 5 positions for total number of bingo sites held on specific software platforms remain unchanged in Table 4 below.

Table 4 - Online bingo sites by software provider

Software Provider	2016
Dragonfish	194
Cozy	95
Playtech / Virtue Fusion	42
Jumpman Gaming	41
Gamesys	13
Microgaming	10
Parlay	10
Bingo Entertainment	7
IP&S	4
White Hat Gaming	4
Proprietary	4
Daub	4
Leapfrog	4
Relax	3
B-Live Gaming	2
GTECH / IGT	0
Probability	0
Total	437

Predictions for 2017

Playtech is still under threat for that third place position by Jumpman Gaming. The high cost of opening a Playtech skin compared to other platforms may be a barrier to its continued growth in site numbers (although not quality) and 2017 could very easily see it overtaken as the third highest number of sites powered by its software.

The Usability of Online Bingo Sites

Looking at a set of key metrics allows us to assess which online bingo sites are the most usable for a user, whilst looking at how well they perform across various browsers and devices.

Table 1 - Top 10 Most Accessible Online Bingo Sites

No.	Brand	Page Speed	Page Size	Page Requests (HTTP)	Responsive	WCAG (Level AA) Accessibility
1	sun bingo	0.8 sec	335kb	5	Yes	No known problems
2	gala bingo	0.8 sec	336kb	8	Yes	135 known problems
3	tombola	1.9 sec	740kb	47	Yes	13 known problems
4	jackpotjoy	2.5 sec	1000kb	1000	Yes	24 known problems
5	costa bingo	3 sec	2.5mb	112	Yes	10 known problems
6	cheeky bingo	3.7 sec	2.4mb	145	Yes	79 know problems
7	wink bingo	3.7 sec	3.9mb	82	Yes	49 known problems
8	foxy bingo	3.9 sec	2.8mb	127	Yes	34 known problems
9	mecca bingo	4.5 sec	3.8mb	153	Yes	500 known problems
10	sky bingo	4.9 sec	679kb	42	Yes	19 known problems

Note: The table above is ordered by the most accessible sites based on page speed, page size and fewest HTTP requests.

We also compared how well each site adhered to Web Content Accessibility Guidelines. Accessibility issues indicate problems for older users, people with disabilities or accessibility needs.

Key

- Page Speed: Best-in-class webpages should load within 3 seconds.
- Page Size: The heavier the site page, the slower the load.
- Page Requests: The more HTTP requests your website makes, the slower it becomes.
- Responsive: Control your page width and scale on different device types with a tailored experience for mobile users.
- WCAG (Level AA) Accessibility: Building a site that is accessible ensures all user types are catered for.

Highlights

Looking at Table 1 - Top 10 Most Accessible Online Bingo Sites we can see;

- Sun Bingo is the most accessible site to date, fully adhering to the Web Content Accessibility Guidelines with no known problems.
- Sites that recorded minimal issues included Costa Bingo and Tombola.
- The least accessible site was Mecca Bingo which this had around 500 known problems.

Cross platform compatibility

- The most compliant sites were Sun Bingo and Sky Bingo offering full support for Internet Explorer 8-11, Edge 14, Firefox 51, Safari 9-10, Opera 41, iOS 8-10 and Android versions 3 and 4.
- Gala was next best with minor issues within IE8 and Safari 5.
- Mecca Bingo, Foxy Bingo, Cheeky Bingo and Costa Bingo all support commonly used browsers apart from significantly older versions of Internet Explorer, Safari and Android.
- Sites that were less than compatible were Tombola and Wink Bingo. Both these brands missed content and functionality within IE8-11, Edge, Firefox, Safari, Opera, Chrome, iOS and Android with such impact causing critical errors.

Responsiveness

Out of all the bingo sites that we reviewed, 70% of them appear to have been built for scalability across mobile, tablet and desktop devices, whilst other brands appear to have opted for mobile specific sites including Jackpotjoy, Cheeky Bingo and Foxy Bingo.

Performance

Industry research in the field of usability, in particular site load times, suggests web users expect a site to load in 2 seconds or less. Furthermore, users tend to abandon a site if it doesn't load within 3 seconds and these figures are nearly halved for mobile users.

Our research suggests that the best performing sites were Sun Bingo and Gala Bingo, with both sites loading in around 0.8 seconds. We would suggest this was based on the principle that both sites use a splash screen to initially load the content of their sites. In essence this reduces the page load time significantly while offering a quicker user experience.

The next fastest site to load was Tombola, which took nearly a whole second more to load the page, but this still fits within the realms of what users deem to be a suitable load time. The closest site to Tombola in third place was Jackpotjoy, coming in at around 2.5 seconds which is still a very reasonable score.

The slowest site to load was Sky Bingo, this nearly took twice as long to load as the Tombola site taking just under 5 seconds.

Wrap-up

As we move ever closer to a mobile only internet experience, brands need to consider this as a strategy in 2017. We're seeing brands in other sectors adopting mobile only development solutions, ditching traditional desktop solutions because of the ceaseless march for domination by the smartphone. Forget mobile first strategies. More like mobile only.

“Out of all the bingo sites we reviewed, 70% of them appear to have been built for scalability across mobile, tablet and desktop devices.”

WhichBingo AWARDS

2016

#WhichBingoAwards



WhichBingo Award Winners 2016

The 2016 WhichBingo awards ceremony was held at the world famous Madame Tussaud's, London on Thursday 19th May, with over 200 guests from the online bingo industry in attendance.

Gala Bingo Head of Operations Craig Perry saw his team pick up three awards, including the coveted 'Best Online Bingo Site' and 'Best Mobile Bingo Experience' awards, following a vote of over 13,500 online bingo players.

Jackpotjoy picked up the gong for 'Best Online Bingo Chat Team' for the second year in a row, as did Foxy Bingo in the 'Best TV Advert' category. Playtech showed they're the best software suppliers in the business, winning two awards including Best Software and Best Unique Game.

Former Atomic Kitten star and Queen of the Jungle Kerry Katona was on hand to pick up the 'Best New Online Bingo Site' award for the Playtech-powered 'Bingo with Kerry' brand.

“Playtech showed they're the best software suppliers in the business, winning two awards including Best Software and Best Unique Game.”



Angus Nisbet (Bingo Director), Adelle Kehoe and Craig Perry (Head of Operations) with Gala's three awards.

WhichBingo Award Winners 2016

2016 Award Winners

Award Category	Winner
Best Online Bingo Site	Gala Bingo
Best Mobile Bingo Experience	Gala Bingo
Fair Play Award	Bingo.com
Best New Online Bingo Site	Bingo with Kerry
Best Online Bingo Chat Team	Jackpotjoy
Best Online Bingo TV Advert	Foxy Bingo
Best Online Bingo Software	Playtech
Best Unique Bingo Game	Cash Cubes - Playtech

Individual Software Awards	Winner
Best Cozy Games Bingo Site	Mummies Bingo
Best Dragonfish Bingo Site	Foxy Bingo
Best Gamesys Bingo Site	Jackpotjoy
Best Jumpman Gaming Bingo Site	Rocket Bingo
Best Microgaming Bingo Site	Butlers Bingo
Best Playtech Bingo Site	Gala Bingo

This year the socially responsible 'Fair Play Award' was presented to the Unibet-owned Bingo.com. In this category the winners were decided by an independent panel of judges rather than public vote, including representatives from GamCare, Senet Group, Gambling Integrity and the Industry Group for Responsible Gambling.

There were also six new categories for the best site on each of the major software platforms;

Cozy Games, Dragonfish, Gamesys, Microgaming, Jumpman Gaming and Playtech.

Overall it was Playtech who dominated this year's winners list, with either themselves or Playtech-powered brands winning 5 of the 8 main categories.



"The WhichBingo team really outdid themselves this year, this venue was amazing! Everyone had so much fun!"

Becky Liggero, CalvinAyre.com

The Event

Over 200 online bingo operators and software suppliers were in attendance at Madame Tussauds, making it the biggest and most extravagant WhichBingo Awards yet.

Upon arrival guests were treated to a trip on the Spirit of London ride, where they were transported back in time through 400 years of London’s history in miniature black cabs. A drinks reception was then held in the ‘Party’ zone, where guests rubbed shoulders with a variety of A-List celebrities, before moving on to the main event in the ‘World Stage’ ballroom.

WhichBingo founder Phil Fraser and Commercial Director Simon Jones were on hand to present the awards, and a variety of industry guests came on stage to help announce the winners throughout.

More photos and video from the event can be found at www.whichbingo.co.uk/awards/



WhichBingo owner Phil Fraser kicks off proceedings



Best Online Bingo TV Advert - Foxy Bingo



Jackpotjoy team celebrate picking up the Best Gamesys Bingo Site & Best Online Bingo

“It is always a great pleasure for Playtech to be recognised and rewarded at the industry’s leading online bingo awards and many thanks to the organisers for a great evening.”

Daniel Phillips, Playtech VP UK operations



Kerry Katona poses with the Best New Online Bingo Site award for 'Bingo with Kerry'.

Industry Comment

My earliest gambling memory is going to a local bingo hall with my mum as a kid and trying to keep up with dabbing my card. The fun my mum and her friends had has created a huge soft spot in me for bingo.

Which is why now I have nothing but sympathy with bingo operators right now as they are facing an unprecedented level of pressure.

It has never been easy being a bingo company but the current challenges in my view, point to fundamental changes happening in the industry.

The traditional industry approach outside of a few big brands has been to launch multiple skins and to allow players to churn within their own network. This creates two big changes in behaviour, one is players have been trained for years on how to switch brands and chase welcome bonuses, meaning that player loyalty is at an all time low. Secondly the demand for bingo skins has encouraged a number of new entrants into the bingo software provider space.

These two changes have then made it easy for SEO affiliates to launch their own brands. With their lower traffic acquisition costs, the SEO affiliates have created a level of competition that is very difficult for the big brands to compete against unless they spend significantly on TV and paid media channels.

When we look at the WhichBingo site we can see the direct effect of all of this with 400+ bingo brands running on 20+ different platforms. Wide choice and little product differentiation is a classic scenario that puts downward pressure on margins.

When we look at the games industry in general, the rise of mobile gaming has been absolutely staggering. The latest data from Apple suggests that over 500 games are submitted every day to the App Store for approval. Mobile gaming is now also the dominant platform by user count compared to PC or consoles.

Right now, with the popularity of mobile gaming at an all time high, bingo players have a wide choice of non-bingo games to choose from including the likes of Candy Crush Jelly Saga from King.

Using King as a proxy for mobile gaming companies we can from see Nielsen data that in 2016 King has spent £2.6million on TV advertising in the UK, this is far more than the majority of some bingo brands. This coupled with the fact that King have no gambling policy restrictions with the likes of Google or Facebook means they can run hyper competitive online campaigns using all the latest advertising tools and features.

On the other side of mobile gaming is the rise of the free to play social casinos or social slots games. When we look at poker, the Zynga poker game has been a permanent top 10 game on Facebook for nearly a decade and since it has launched on mobile it's been a constant top charting game in both Apple and Google stores.

Social slots and casino games are no different, with a good product, good marketing and great visibility in the app stores the games have been able to target a demographic that would never consider real money gambling, while also targeting the existing bingo user base who can get the same buzz from playing games without the financial cost.

As we have seen with the recent transactions of DoubleDown by IGT in the US for \$500m, and looking at the install base of these games from app store monitoring tools, the market demand for free to play casino games is very large and growing.

While bingo operators are facing pressure from the social / mobile type games, when we look at the importance of slots games to a bingo operator there is significant pressure here too.

Traditionally and particularly in the UK, online casinos are not very appealing at first glance, with dark colour schemes, James Bond-esque models on the home page and welcome bonuses in the thousands. For a bingo player it was not the most attractive place to play or to be seen to play on. That is until the Scandinavians did an IKEA style makeover to casino sites, and we now have the likes of Leo Vegas, Mr Green, Thrills, Risk, Casumo, Casino Heroes and a host more all actively targeting the UK market, including bingo players.

These casinos with their soft and friendly branding, excellent customer service, free spin heavy welcome offers, generous CRM and quick cash outs are not only setting the benchmark for all casinos but are providing a viable alternative for bingo players who want a great slots experience. Subsidised by the lucrative Scandinavian markets and keen to prove to the financial markets that they can operate internationally the UK is typically the first port of call for any Scandinavian casino brand that wants to get big.

This Scandinavian invasion creates a constant marketing pressure and level of innovation on the slots side of the business which then puts a huge pressure on bingo brands retaining their higher value players.

In summary, the bingo operators face a bottoms-up pressure on player retention from the mobile games and social casinos and a top-down pressure from the bingo player friendly Scandinavian casinos. These are both coupled with the normal industry wide pressure of 400+ brands and a commoditised product. This triple threat does not bode well for the industry.

What should the bingo industry be considering?

First off is game innovation. Rush Poker pretty much saved the poker industry, and accumulator cash out has changed the nature of Sportsbook. Hit slot games like Starburst have also created the new benchmark for casino gaming.

From a bingo perspective there have been no “must have” game innovations in recent times that have set players alight with excitement. Without this it’s not fair to expect players to care about which 90 Ball Bingo game they play on which site.

Bingo Godz from Bede Gaming, which launched in 2013,

tried to change this traditional bingo play approach by introducing power up XP levels with gamer style graphics and characters, but failed to capture the imagination of the average bingo player.

The second area of innovation and straight from the Christensen Clayton “Innovator’s Dilemma” playbook is that operators and software providers need to disrupt themselves before the new competition does, and this means launching their own free to play bingo/casino products on mobile, backed by a significant marketing budget and dedicated operating teams. Using their existing well-known bingo brands should enable operators to cut through the thousands of random and often poor games available on the market.

The final area is to focus on creating a welcoming “bingo style” casino experience. The biggest advantage a bingo room has over a casino is the community. By bringing this community element to casino through the new multi-player slots games or through hourly slots race type promotions (Casumo are doing great things here) shows there is plenty of scope to merge the best of bingo with casino.

To wrap up, the bingo industry faces some tough choices and stiff competition from all directions, to thrive in the future requires making the right calls now.

“The traditional industry approach outside of a few big brands has been to launch multiple skins and to allow players to churn within their own network.”

Author contribution

The Industry Comment in this report has been written by Fintan Costello, who is the managing partner of consultancy firm Revenue Engineers based in Amsterdam. His previous roles and industry experience include a senior industry head position at Google, and leading the online marketing departments for PokerStars and PaddyPower.

Industry Predictions 2017

We asked some of the prominent and leading figures in the online bingo industry for their comments and predictions for 2017.



Tom Ustunel,
Head of Bingo,
Sun Bingo

It's been said many times before by the marketing industry, but mobile is still going to be big in 2017. And by "big" I mean it's not just going to be

about a mobile first experience, more likely mobile only in the future. Bingo has a long way to go to catch up to sportsbook, but the opportunities are there to make sure the industry keeps up. We're still seeing second and third screening experiences with players, but moreover, the laptop and desktop is being taken over by the smartphone and tablet.

Regulation and how the industry reacts to it will be a key indicator in 2017. With taxation on free money offers coming and the potential of changes to how the gambling industry can advertise on TV means we must look at how we not only recruit new players, but how we maximise revenues from existing players.

Better data profiling and things like segmented profiling will be key in 2017 in understanding how we can give a personalised one to one experience to bingo players. The gambling industry is playing catch-up to other industries, and it's not down to the lack of technology or data. A tailored and personalised experience for bingo players throughout their time with a bingo brand is going to be crucial to keeping them loyal advocates.



Jon Bowden,
Head of Acquisition
Marketing, Ladbrokes Coral
Interactive, Gala Brands

2017 could see operators further impacted with regulation. With these challenges however there is always opportunity, in particular

in how we communicate with our players. I think welcome offers will move away from being purely driven by bonus, and operators will look into other ways in which they can attract new players.

Player experience is also rightly being recognised as an area of focus and offers huge opportunity. In all touch points including acquisition, gameplay, promotionally and through CRM we'll see further focus on both 'gamification' and 'winability' in 2017, especially with the continuing rise of mobile use.



Sophie Pranczke,
Head of Bingo,
Stride Gaming plc

With the upcoming changes to POCT, a key focus for all companies this year will be looking at how to minimise additional cost exposure without

affecting the player's experience. To remain ahead of the curve, all functions will need to review and optimise their offering, exploring ever-more innovative ways to encourage player acquisition and retention - a great opportunity to try something new!

Another ongoing area of buzz is the great Flash vs HTML5 battle. As popular browsers move towards disabling Flash by default this year, HTML5 games and bingo development will surely be at the forefront of most development roadmaps. Identifying the must-have features and keeping the player experience at the core of project plans will be key to make these transitions smooth and successful.

Increasing engagement will be as important as ever in 2017, but through BI and Analytics operators will continue to personalise the user journey like never before. Optimising the data collected and making sure it's used effectively will no doubt be a key strategy for increasing customer retention and loyalty this year.



Adam Scott,
Senior Games Product Owner,
Gamesys

I think 2017 is going to be another year that sees operators continue to focus on their mobile bingo offering. In the first instance, to enable a full range of

choice to all players across all platforms without forgetting that both performance across those platforms and specific device usability remains key to the success.

‘HTML everywhere’ should be on people’s minds right now with the exodus of Flash coming soon, and the task of converting that Flash content must also be in everyone’s roadmaps. I think although mobile is incredibly important, we need to remember to keep a solid offering on our desktop sites as there will always be players that choose this platform exclusively or as an extension of their mobile play.

Will there be any time for anything else in 2017? I certainly hope so! And I’d like to see some innovation in the form of new mobile bingo variants, tailored to shorter session times for the player on the move.

I don’t expect to see many new bingo sites joining the market, but will not be surprised to see further consolidation deals with the larger players taking the smaller brands under their umbrella. Here they will be able to benefit from access to the deeper pockets that those operators inevitably have.

One thing I am certain of is that this will be another exciting year in the world of bingo and I am looking forward to seeing where we will be at the end of it!



James Boord,
Head of Bingo and Poker
Marketing at Sky Betting &
Gaming

The bonus tax implications that come into effect from August 2017 could well be the tipping point for those smaller operators

that managed to cling on when the initial POC tax came in. Sadly I do not foresee M&A activity as a result instead it will be the larger operators that can outspend to gain share of wallet once the change comes into effect.

The market has matured significantly in the past 18 months given the removal of new player only offers from daytime TV. This has led to significant investment in brand development and creative which in turn has enabled operators to focus on emotional and feature led advertising. I do not foresee a significant impact in the short term given we have relatively new acquisition channels such as social, programmatic display and VOD that are now maturing. Long term, if advertising bingo moves to post 9pm, then it could impact the creation of new bingo fans but I think this is unlikely.

Looking at catering for mobile players and understanding cross device behaviour is going to be key in 2017. Clearly time on device is the key difference between desktop/mobile but I would say the feature parity gap has closed significantly in the past 24 months. For me the future of the mobile experience is now about who wins the UI/UX journey as the bingo industry as a whole has a poor in game mobile experience. Cannot say more as this for me is the key to winning in the market over the next 24 months but look out for our exciting development plans.

“Better data profiling and things like segmented profiling will be key in 2017 in understanding how we can give personalised one to one experience to bingo players.”

Contacts

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