2019
ONLINE BINGO ANNUAL REPORT

WhichBingo
Find your new bingo site today

"Those who understand the full extent of value in bingo will be in a strong position to capitalize on the ever-changing iGaming landscape..."

Kevin McGinnigle, PDM Ltd (Industry Predictions, p24-25)

Contents

Introduction

“The acquisition of WhichBingo has been an exciting milestone for XLMedia. It is a site that is celebrated by both its community of players and bingo brands for its commitment to truth, honesty and accountability. Those values fit perfectly with our vision of creating great assets and being a leading supplier of high quality users.

The industry has seen some turbulent times over the past year, regardless, WhichBingo has seen great success – and we are hungry for more. It is a great honour for us to lead WhichBingo into 2019 and continue its legacy as the most admired bingo site in the UK.

I also want to take this opportunity to applaud and thank Phil Fraser and the previous WhichBingo team for their dedication and commitment throughout the years, as well as extend my sincere thanks to everyone who contributed to this report. We wouldn’t be where we are today without your insights and support.”

Ory Weihs
Chief Executive, XLMedia PLC

XLMEDIAPLC

What's in this report?

The fourth edition of the WhichBingo Annual Report is our biggest and the most in-depth to date. Featuring opinions from the industry's leading players, alongside our analyses of the latest trends and data, this is what you need to know about UK Bingo in 2019.

In addition to our own research and analysis, we have invited industry leaders to contribute their views and opinions.

Nick Harrison and his team at specialist creative and media agency Home, return to once again reflect on the how the TV and media marketplace has changed in the last year.

Michael Hewitt and Amber Malone from Stickyeyes give their analysis of the latest Google algorithm changes and how they have affected the SEO landscape for bingo operators and affiliates.

Ken Muir from iGaming Tracker takes a look at the most popular slot titles of the year, with a specific focus on how the trends differ between bingo and sportsbook brands.

We also have an exclusive interview with Sky Betting & Gaming Chief Executive Richard Flint who discusses the big developments in responsible gambling this year and what the industry can expect going forward into 2019.

This year's online bingo player's survey brought in some interesting results, we look back at the WhichBingo Awards 2018 event and bring you our commentary on the number of bingo site launches and closures throughout 2018.
And finally we have our 'industry predictions' section which this year includes contributions from Keir Hutton-Ferris (Kindred Group), Kevin McGinnigle (PDM Ltd), Ben Starr (15 Marketing) and Simon Collins (River iGaming UK). Each offers an interesting glimpse into what the industry can expect for the year ahead.

About WhichBingo

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

Now the online bingo sector's foremost marketing partner, WhichBingo has become the bingo authority with our annual WhichBingo Awards, the most recent of which was held at London's Steel Yard in June 2018.

Named EGR's 'Best Bingo Affiliate' in 2015, 2016 and 2017, and the 'Best Bingo Site' in 2016 and 2017 at the iGB Affiliate Awards, WhichBingo continues to be a force to be reckoned with in the bingo sphere.

TV and Media Spend 2018

Year on year ad spend for the online bingo category increased 3% in 2018 vs 2017, with investment in press continuing to tail off and reported digital advertising slipping, most likely as a result of a shift into programmatic buying. At the same time, operators have upped their investment in TV spend by 15%.

Top 10 brands advertising on TV

From the estimated £42m* spent on TV advertising for the period 1st January to 31st December 2018, the top 10 advertisers and brands are shown in the table below:

Table 1 - TV Ad Spend 2018

No.	Brand	Spend £m
1	Tombola	£12,577,078
2	Gala	£9,068,992
3	Sky Bingo	£4,959,315
4	Sun Bingo	£4,952,021
5	Wink Bingo	£2,473,078
6	Mecca	£2,323,022
7	Jackpotjoy	£2,149,735
8	Buzz Bingo	£1,699,567
9	Foxy	£923,221
10	Betfred Bingo	£477,650

*Figures are taken from Neilson's Addynamix.

Mirroring 2017's figures, the top 10 brands contributed to over 97% of all TV spend for the period, with the top 5 contributing to almost 80% of total TV spend.

Coral, Fabulous Bingo and Pick Me Up Bingo, all in the top 10 TV spenders for 2017, were absent from the list for 2018.

Tombola continues to lead the way on TV, outspending the #2 ranking brand by over £4million for the second year running, with their TV spend representing 30% of the total for the category.

Both Tombola and Gala had an always-on TV strategy in 2018, with consistent spend across the year, and a slight upweighting at the start and end of the month around payday.

Tombola

Tombola remain consistent in their approach across the TV creative, sticking with the community-focussed angle, showing all the different scenarios in which people can play their games.

Tombola have also continued to invest in their sister casino product Tombola Arcade, building on the halo effect from their core bingo offering. In addition to traditional TV airtime and following on from the successful sponsorship of "I'm A Celebrity Get Me Out Of Here" in 2017, Tombola Arcade sponsored the show again in 2018, running creative idents featuring various games and with playful bug characters.

Gala Bingo

Gala Bingo changed its TV creative in August 2018, focussing on audiences playing at home with a comical spin that moves away from their more conservative routes of the past, still utilising the 'Galalala' skit based on the Bananarama song, in various iterations.

In addition to spending £2million more on TV than during 2017, 2018 saw Gala Bingo extend partnerships with ITV, and continuing their ongoing cooperation with the popular gameshow "The Chase".

Sky Bingo

Sky Bingo saw TV budgets increase again in 2018 vs 2017, with adverts running daily throughout the year, with slightly less exposure on weekends.

Sky's most notable creative featured former X-Factor contestant Rylan Clark-Neal as a voiceover in a Gogglebox style of narration, while two women sit on the sofa. This creative incorporated the offer into the ad, delivering an interesting twist on the traditional end frame format.

Sun Bingo

Sun Bingo's TV spend nearly doubled in 2018 compared to 2017, launching with their new creative in February and running every month after with a 2/3 week on and 2 weeks off strategy, upweighting weekdays and payday.

The creative ran along a similar theme to recent campaigns from heritage bingo brands Gala and Mecca, by taking a well-known track and changing the lyrics. However, the choice of the track by Funky Dee 'Are You Gonna Bang Doe' positioned the ad towards a younger female audience than their competitors.

Comedian Jayde Adams stars in the Sun Bingo 'Are You Gonna Bingo' TV ad

In addition to the TV investment, the brand announced their sponsorship of the "Jeremy Kyle Show" in June. Previously sponsored by rival bingo brand Foxy Bingo, the Sun aligned with the TV creative, launching comical TV idents featuring the ad's star and comedian Jayde Adams in the setting of the show. The idents sit across both TV and VOD and the partnership extends across social, giving the brand access to the shows loyal online following.

Wink Bingo

Launching with a new look in January 2018, Wink Bingo maintained TV spend year on year. Their new creative focusses on 'Wonder Women of the World' and was delivered in 10" and 30" formats. Following a similar strategy to 2017, they avoided spending during the summer holidays and ran with a 2/3 week on, 2 week off strategy, coming off air around the middle of the month.

2018 also saw the brand invest in cinema for the first time, broadening their reach further in an environment rarely touched by their competitors, likely due to the relatively high campaign costs.

Mecca Bingo

Mecca Bingo made a return to TV at the end of 2017, bringing back the heart and soul of the 90's with their Macarena spin-off creative. Running always-on throughout Jan – March, the brand avoided the summer months and returned to air in October until the end of the year.

At the time of launching the new creative, the brand ran activity with Global and Bauer stations, delivering their Meccarena airtime creative across female-focussed stations.

Jackpotjoy

Jackpotjoy saw slightly reduced budgets in 2018 vs 2017 on TV, spending only between January and March and in the last few days of December. Creatives continued to feature their new brand ambassador Paddy McGuinness, with the ads poking fun at AI assistants in homes and playing on his well-known and liked Lancashire accent.

Buzz Bingo

In October, Buzz Bingo entered the market, following the rebranding of over 100 of Gala Leisure's bingo halls. The brand used TV, digital and social to promote their new online product and bingo halls, using the strapline 'Britain's Biggest Bingo Club'. This blend of messaging promoting both bingo halls and online games is unusual for the category, but is in line with their aims to change perceptions around bingo and make it more appealing to a younger, millennial audience.

Foxy Bingo

Foxy Bingo chose the unusual tactic of returning to TV in August 2018, a time of year when most bingo brands avoid spending due to the summer holidays. TV spend was a third of the previous years, running always on until December. The creative returned to featuring the classic Fox character, without Heather Grahams' cameo.

Betfred Bingo

Betfred Bingo upped TV spend from £80k to £500k in 2018, focussing activity between January to April only. The creative shows a mixture of men and women playing on iPads, looking to gain players through the halo effect of their heritage sportsbook brand.

Author contribution
This article has been provided by Nick Harrison who is Managing Director of Home Marketing (Gibraltar) Ltd, a specialist agency providing creative and media services to some of the world's best known gambling brands. www.homeagency.co.uk

HOME

Bingo SEO Analysis

How Google's EAT update is changing the bingo market for both operators and affiliates

The organic search market for online bingo has historically been one of the most competitive, as well as one of the most volatile, in the UK. Like many search markets in the iGaming sector, it is one that is characterised by having numerous operators, affiliates and publishers that are all using different tactics to pursue a small number of very high-volume keywords.

Over recent years, changes introduced by Google to reduce that volatility and to improve the quality of the results have largely resulted in a much more stable search market. Bigger brands now tend to dominate whilst, with a handful of exceptions, affiliate sites have been pushed further away from view.

In August 2018 Google updated its Search Quality Evaluator guidelines and introduced the so-called "EAT Update". These two moves saw the search engine clearly state what it is looking for in many commercial search markets, and provide clear definitions on the three key principles of the EAT update – expertise, authority and trust.

This update naturally played into the hands of many of the bigger operators, most of which already had search marketing strategies that reflected the principles of the update. The update naturally tends to favour trusted brands and established domains, those brands that follow best practice on issues such as page speed, usability and security, and those brands with diverse, natural link profiles and genuinely useful content.

So just what effect has that update had on the online bingo market, and what do operators and affiliates need to do in 2019 to ensure that they can capture that sought-after search traffic?

Understanding the keyword landscape

Stickyeyes has analysed the 319 non-brand keywords with the largest search volume in the UK online bingo market. These keywords combine to generate a monthly search volume of 285,833.

Of these 319 keywords, the term "bingo" accounts for more than 38% of the overall search volume in the bingo sector, and it is therefore little surprise that this is the most competitive keyword in this search market. competitive keyword in this search market.

Table 1 - Non-Brand Keywords

No.	Keyword	Category	Search volume	Max traffic
1	bingo	bingo generics	110,000	26,543
2	bingo sites	bingo generics	18,100	4,368
3	free bingo	free bingo	12,100	2,920
4	bingo games	bingo generics	12,100	2,920
5	free bingo no deposit	no deposit bingo	8,100	1,955
6	online bingo	bingo generics	8,100	1,955
7	no deposit bingo	no deposit bingo	5,400	1,303
8	bingo game	bingo generics	5,400	1,062
9	free bingo games	free bingo	4,400	1,062
10	new bingo sites	bingo generics	4,400	1,062
11	bingo online	bingo generics	4,400	1,062
12	best bingo sites	bingo generics	4,400	1,062
13	bingo house	bingo generics	4,400	1,062
14	bingo with no deposit	no deposit bingo	3,600	869
15	bingo games free	free bingo	2,900	700

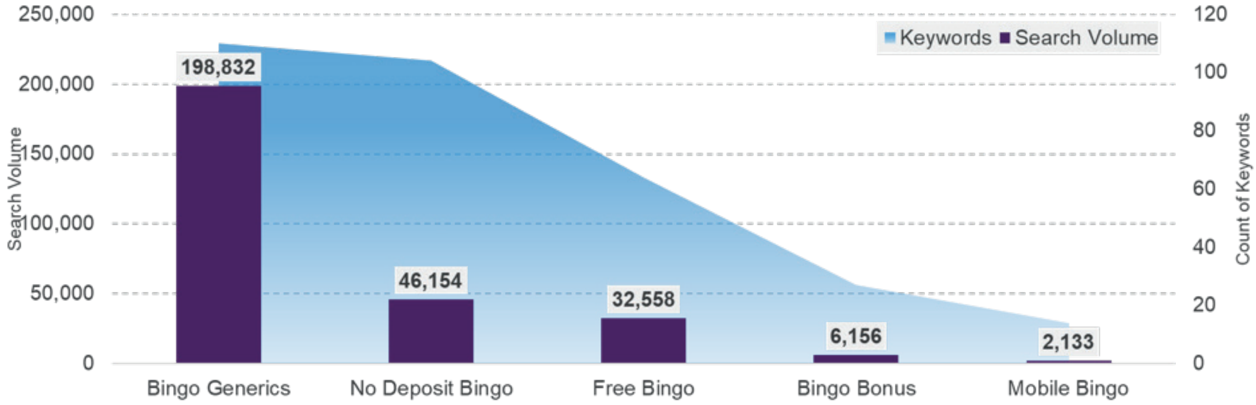
Using our estimated click-through rate, a position one ranking for the keyword term "bingo" would generate an estimated maximum traffic of 26,543 from this keyword alone. It is therefore no surprise that this keyword term is one of the most hotly contested search markets in the UK.

The strength of this one keyword is representative of a trend that we have seen over recent years in a number of markets, particularly in the iGaming sector, for search volume to concentrate around one or two primary keyword terms and away from longer-tail search terms. We have seen the growth of terms such as "bingo", "poker" and "casino" in recent years, whilst even two or three-term keyword searches have generally shown a downward trend.

This trend means that the opportunities to generate visibility for those brands that don't rank for the main traffic driving terms become smaller, and it also tends to favour those larger brands that find it much easier to provide those trust signals that earn the high-ranking positions.

But despite this trend, it is important for all brands to retain a focus on the entire keyword set. Not only does this provide opportunities to drive organic traffic, much of which is less competitive and better-qualified from a customer acquisition perspective, but it also helps those brands that do rank prominently on the main keyword terms to 'spread the risk' of ranking fluctuations. A ranking drop from position one to position two for the term "bingo" could cost a brand as much as 13,000 organic clicks – a diverse keyword strategy helps to mitigate this loss.

Table 2 - Keyword Category Potential

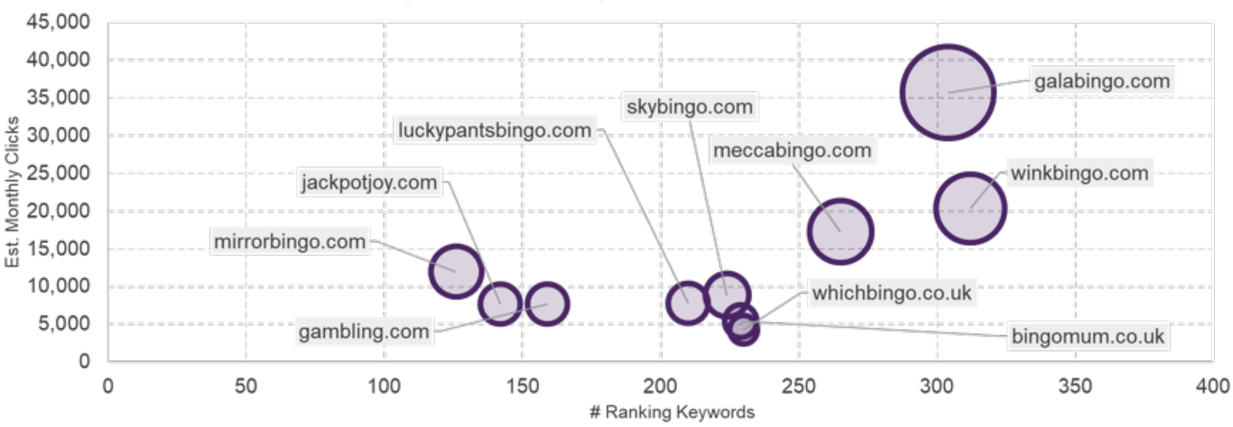


For example, there is a sizable number of keywords across terms for 'no deposit' products that, whilst not generating the sort of volume that generic keywords generate, do still provide a worthwhile volume of search activity. This volume also indicates a strong propensity to play (albeit with no initial deposit commitment), and therefore represents an opportunity for acquisition and up-sell. Keywords focused around "mobile" also provide access to 'prequalified' audiences that, whilst not necessarily great in volume, may demonstrate a greater propensity to convert.

Gala Bingo increases visibility at the top of the market

Gala Bingo was the most visible brand when we performed this analysis for the 2018 WhichBingo report, and the brand has held on to that position in the market throughout the course of the year. However, whilst Gala Bingo has increased its organic visibility slightly over the course of 12 months, from 32,409 to 35,694, the market behind them has become much more competitive.

Table 3 - Organic Search Visibility - All Market Leaders



Gala Bingo, once again, ranks in position one for the main keyword term, "bingo", and this accounts for around 74% of its visibility, although this keyword accounted for 82% of the brand's visibility in the previous year, indicating that the brand is reducing its reliance on that one keyword.

Despite Gala Bingo's gains in organic non-brand search, the gap between them and their next most visible competitors has decreased significantly. Twelve months ago, Gala Bingo had almost two and a half times the visibility of the second-most visible brand, but this has reduced significantly over the course of the year.

The second most visible brand is now Wink Bingo, which generates a visibility of 20,360, followed by Mecca Bingo with a visibility of 17,249.

But the market is also becoming much more congested behind these leading brands, with four brands all generating a similar amount of traffic from organic non-brand keywords. In the middle of our 'top ten' most visible brands, we have Sky Bingo, Lucky Pants Bingo and Jackpotjoy all generating visibility between 8,865 and 7,692 from the keywords in our analysis.

Gambling.com and WhichBingo.co.uk are the only affiliates who are in our most visible top ten.

Keyword breadth becomes more important in the context of EAT

One statistic that stands out from our analysis is the importance of keyword coverage percentages, and how it is necessary for brands to reduce their reliance on a very small number of keywords – even in industries where one or two keywords drive such a huge proportion of the search volume.

We have already noted that Gala Bingo has reduced its reliance on the keyword "bingo", and increased its visibility as a result, and it comes as no surprise that the three brands with the highest levels of organic non-brand search visibility are those with the greatest level of coverage across our keyword set. Gala Bingo ranks for just over 95% of the keyword set.

Whilst keyword coverage alone is not necessarily a measure of how sustainable a brand's SEO strategy is, it does highlight the extent to which a brand could be exposed to even relatively modest fluctuations in search rankings. The challenge for any brand is to ensure that they are sustaining that visibility over the longer term by building their rankings across the full breadth of the keyword market, and supplementing this with a strong brand presence.

This becomes even more important in the context of the recent Google EAT updates, which place a much stronger emphasis on elements such as brand recognition and trust, user experience, proposition and user engagement. These principles apply to all markets, but particularly markets such as online gambling, where regulatory scrutiny is high and where customers need to feel that they can trust the search results being presented to them.

A broad keyword strategy has long been considered 'best practice' from a search marketing perspective, and this is still very much the case, but in a search market that has often been one of the more volatile, it becomes even more important in the context of the EAT update.

The role of links

Since the Penguin algorithm of 2012, many in the search marketing industry have questioned the value and importance of links. Whilst it is generally accepted that links do still have an influence on rankings, it is becoming harder to identify a correlation between links and organic ranking performance - particularly in industries where the Penguin update was designed to "clean up" certain SEO practices.

Instead, various other factors now come into the equation to reduce the level of authority that links alone could have on the search results, and these factors are once again amplified by the recent EAT updates that put the emphasis very much on human factors and perceptions, rather than factors such as links.

Table 4 - Brand Visibility

No.	Site	Visibility	# Keywords ranking	Weighted average rank	% Pos. 1 clicks	Keyword %
1	galabingo.com	35,694	304	22	51.8%	95.3%
2	winkbingo.com	20,360	312	10	29.5%	97.8%
3	meccabingo.com	17,249	265	31	25.0%	83.1%
4	mirrorbingo.com	11,960	126	22	17.3%	39.5%
5	skybingo.com	8,865	224	29	12.9%	70.2%
6	luckypantsbingo.com	7,792	210	26	11.3%	65.8%
7	jackpotjoy.com	7,710	142	27	11.2%	44.5%
8	gambling.com	7,692	159	36	11.2%	49.8%
9	bingomum.co.uk	5,411	229	12	7.8%	71.8%
10	whichbingo.co.uk	4,283	230	14	6.2%	72.1%

Table 5 - Brand Link Profiling

No.	Site	AHREFS URL Quality Score	Referring Domains
1	galabingo.com	14%	3,569
2	winkbingo.com	26%	2,822
3	meccabingo.com	17%	4,569
4	mirrorbingo.com	12%	1,176
5	skybingo.com	21%	1,153
6	luckypantsbingo.com	13%	985
7	jackpotjoy.com	34%	3,353
8	gambling.com	33%	5,479
9	bingomum.co.uk	9%	277
10	whichbingo.co.uk	36%	2,352

An analysis of the ten most visible brands tends to demonstrate this, with no real pattern or correlation between rankings and link factors. Whilst brands such as Jackpotjoy, Wink Bingo and Sky Bingo do have relatively good AHREF link quality scores when compared to other operators, this isn't necessarily demonstrating any particular trend from a links perspective.

Where does this leave operators and affiliates?

The search market has been difficult for affiliates for some time, as Google has increasingly looked at what value many of these affiliate brands offered to the search user as part of the user journey.

What emerged very quickly was that Google was looking for these affiliates to offer real value to the user themselves, in the form of good content and a good customer proposition. But many affiliates didn't offer this, and simply acted as a springboard between the search engine and the eventual bingo operator – Google could easily cut that click out of the customer journey and in many respects, that's what it did. Gambling.com and WhichBingo.co.uk have established themselves in the top ten most visible brands of the bingo market and these two brands in particular are delivering on that customer expectation of trusted, independent and valuable content.

And that is very much the takeaway message from Google both in terms of the EAT update of 2018, and the updates, advice and guidance that preceded it. The EAT update puts customer focus very much at the forefront of what brands should be doing, but brands need to focus on how their proposition translates across the search journey – not just on their own properties. Chasing the high-volume keywords may sound like the obvious strategy, but unless your customer proposition stands out from the competition, it's going to be difficult to oust those trusted, respected and established brands from the top slots.

Author contribution

This article has been written by Michael Hewitt, Content Marketing Manager, & Amber Malone, Research & Insights Consultant, Stickyeyes. Stickyeyes are a digital marketing agency that provides full service digital solutions, from SEO, content, paid search and programmatic through to full digital strategy and transformation. www.stickyeyes.com

About Stickyeyes

Starting as specialists in digital strategy with a pedigree in acquisition (SEO and PPC) in the 1990s, Stickyeyes meets client needs by bringing a strong strategic component to multichannel integration.

Our services include digital consultancy, SEO, content marketing, PPC, programmatic advertising and biddable media, web design and development, marketing automation and lead generation and conversion rate optimisation, all supported by a comprehensive multilingual team.

We pride ourselves on employing the best in the industry and our team has an enviable pedigree in working with major international brands, including Kroger, Hertz, ghd, Staples, AO and MTV covering 22 territories and 15 languages in-house. We also have a wealth of experience in iGaming, with our dedicated iGaming team working with a number of international brands across Sports, Casino, Slots, Poker and Bingo.

As part of the wider Interpublic Group (IPG), we can also draw on the expertise of 50,200 diverse and talented individuals to provide clients with a full-service marketing view.

About our data

For the purposes of this report, we have analysed 319 keywords across the online bingo market. These keywords represent the largest traffic-driving keywords in the market. This analysis does not include or consider brand-related keywords. This is to ensure that a brand's visibility is not influenced by external factors including, but not limited to, non-digital advertising (TV, print, etc), display advertising, news media coverage, sponsorship activity and celebrity endorsements.

The total monthly organic search volume of these keywords is 285,833. Search volume for keywords that experience seasonal fluctuations are reported as an annual average figure, and not as a seasonal peak figure.

Visibility is calculated by analysing the search ranking of each domain for each keyword, and the search volume for each of those respective keywords. Stickyeyes applies an industry average click-through rate for each ranking position to determine the estimated traffic.

Maximum traffic is an estimate of the level of traffic that a brand could expect from organic, non-brand search terms if it were to rank in position one for every keyword that we analysed.

Domains that rank in search results multiple times for the same keyword term are only credited with visibility for the highest-ranking position.

This analysis only includes the domains of commercial operators in the online bingo industry and does not include the web domains of news media publications, informational websites (such as Wikipedia), charities, government bodies or regulatory agencies.

Stickyeyes

Online Bingo Player Survey

Key findings from the 2018 WhichBingo Player Survey*

An Overview of the 2018 WhichBingo Player Survey:

- Bingo players remain loyal to a handful of their favourite brands.
- Playtech is the driving force behind 7 of the 10 most popular bingo brands.
- The past year saw an increase in the frequency of play and average deposit values.
- More bingo players are playing online slot games.
- There has been a positive change in players' attitudes towards bonuses because of fairer wagering requirements.

Demographics

Playing online bingo has long been considered a game more popular among women, despite the best attempts bingo brands to market it as a unisex proposition. This still seems to be the case as the gender split between our survey participants this year was 88% female versus 12% male. This year's results also show an increase in the number of older players for the first time in three years, with particular growth among the 55 and above age group.

Figure 1: Gender divide amongst online bingo players

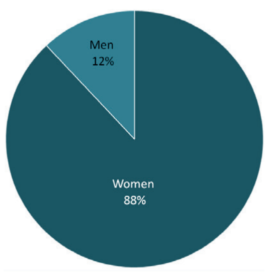
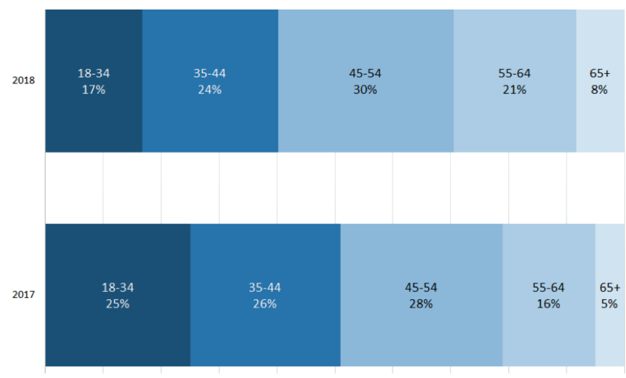


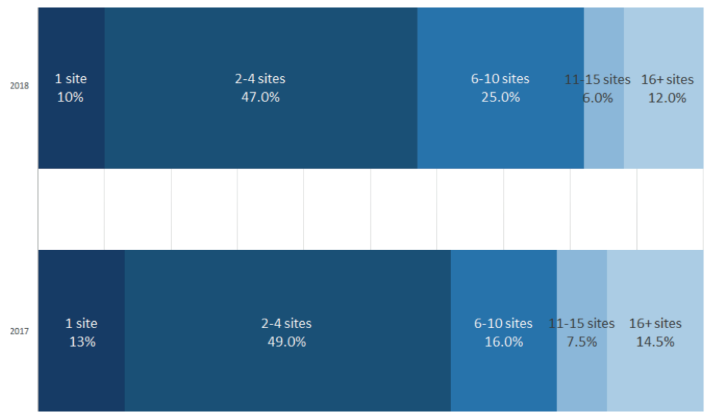
Figure 2: Online bingo players by age group



Membership

This year's statistics on the number of brands players are members with showed a drop in the number of players opening accounts at multiple sites. Less than a third of players (28%) have memberships at more than ten brands, which could be a result of the decrease in the number of no-deposit welcome bonuses over the past 18 months. Over half of all players (57%) stated they had accounts with less than five brands, which suggests bingo players are generally loyal a handful of brands. Of those surveyed, 10% are members of just a single bingo site.

Figure 3: How many bingo sites are you a member of?



Most popular bingo brands

Amongst those surveyed, Sun Bingo came out as the most popular brand when respondents were asked who their favourite online bingo site was. The survey also found that seven of the top ten most popular brands are built on the Playtech bingo platform. Both of Gamesys' major brands, Heart Bingo and Jackpotjoy also make the top ten, with tombola the only site powered by its own proprietary software, to make the list.

Table 1: Most popular bingo brands

Position	Brand	Software
1	Sun Bingo	Playtech
2	Tombola	Proprietary
3	Heart Bingo	Gamesys
4	Gala Bingo	Playtech
5	Sky Bingo	Playtech
6	Mecca Bingo	Playtech
7	Buzz Bingo	Playtech
8	Paddy Power Bingo	Playtech
9	Jackpotjoy	Gamesys
10	William Hill Bingo	Playtech

Spending habits

This year's survey suggests that players are depositing more on average than they were in 2017. The number of players who said they deposit more than £50 per month increased from 54% to 71%, with a big increase in the number of 'high rollers' who deposit over £100 per month.

In regard to which games they spend the most money on, bingo games came in first, with slot games a close second. This is no surprise given the long established affinity towards slots from bingo players, which extends even into the land-based bingo halls.

Figure 4: Average monthly deposit values

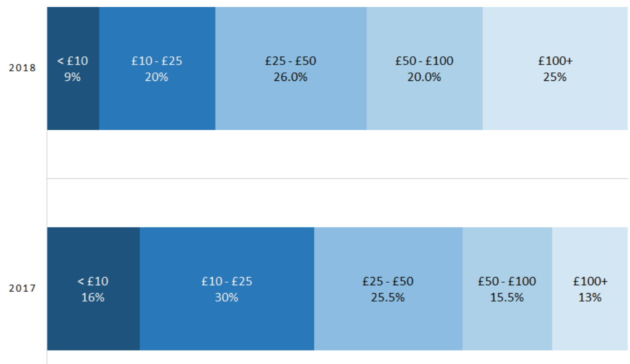


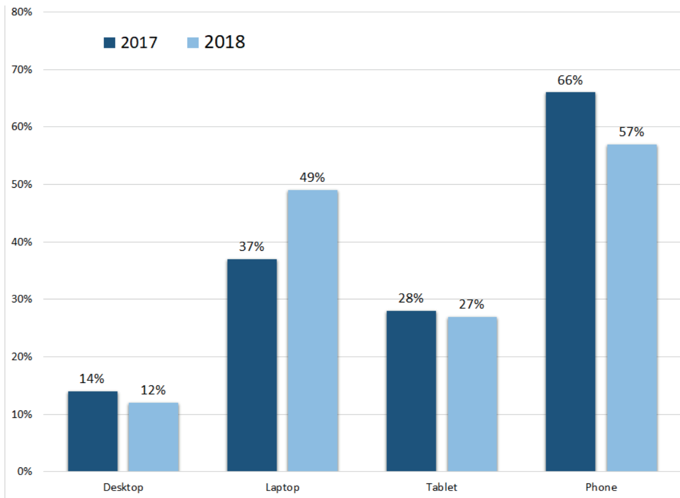
Table 2: Which games do you spend the most money on?

Spends the most money on...	% of players
Bingo games	49%
Slot games	45%
Casino games	3%
Scratch / Instants / Other	3%

Devices

Two surprising results from this year's survey were the drops seen in the total number of mobile device players, alongside a significant increase in those who play bingo on their laptop. This, however, could reflect the demographic stats of those who participated in the survey (an increase in the 55+ age group). Our own stats for WhichBingo's website traffic back up the widely held view that mobile continues to dominate the landscape, therefore we put the drop in mobile users as a potential anomaly in this year's figures.

Figure 5: Devices used to play online bingo



Despite having a variety of devices to choose from, the survey indicates that most players still stick to just one type of device. Just over a third of players (36%) said they used multiple devices to play, which is almost the same results we saw in 2017 (35%). Of the players who claimed to play via mobile and tablet, the most popular way to play was via their mobile device's web browser (46%) as opposed to downloading a dedicated app. Again, we saw a similar pattern in 2017 (49.5% web browser only).

Table 3: Which devices do you use to play online bingo? (Multiple choice)

	% of players
Only phone	27%
Only laptop	25%
Only tablet	6%
Only desktop	6%
Multiple devices	36%

Table 4: When playing bingo on mobile or tablet, do you...

	% of players
Play via the web browser	46%
Play via a downloaded app	22%
Play via both apps and web browser	32%

Withdrawals

We asked players, “Is there an amount which you’ll only withdraw if you get above it?” The results were almost the same as last year’s survey, with the mode average of £50 being the most popular response. £100 was again the second most popular target for withdrawals. Overall, 86% of the players who answered this question gave a value of less than £100 which again shows that bingo players are happy to withdraw small winnings. We did however see an increase from 6% to 12% in the number of players who would only withdraw if they won over £150.

The clear majority of players surveyed had made a withdrawal (89%). This amount was an increase from the 2017 survey (78%). 11% said they had been refused a withdrawal by a bingo brand, with incorrect or out of date ID being the most common reason why their withdrawal was denied.

Wagering and bonuses

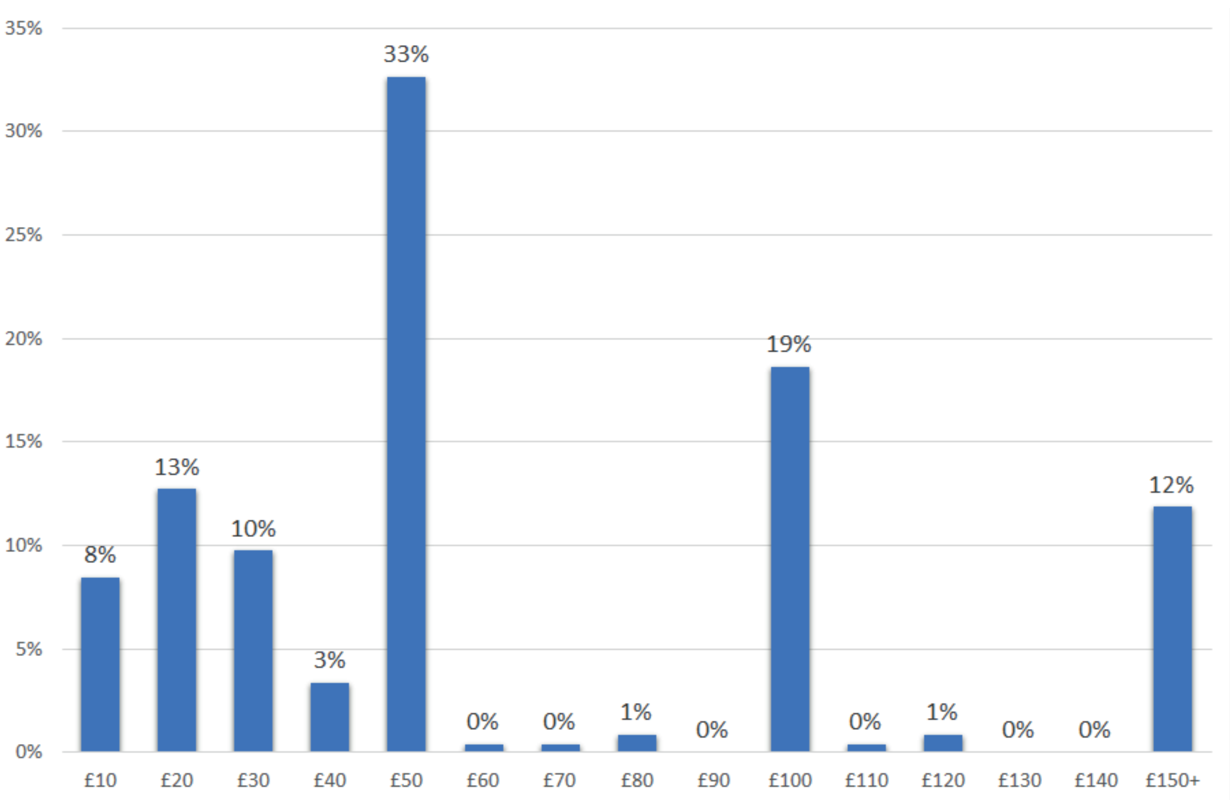
Last year we saw a big change in public opinion towards deposit bonuses, with 61% of players stating they would rather get no bonus at all if it meant they could withdraw winnings more easily. However, this year that figure dropped to 55%, which could indicate that deposit bonuses and wagering requirements overall have improved to such a point that players are more willing to claim them.

This year’s survey results also revealed that 86% of respondents said they know what wagering requirements are, compared to 73% in 2017. These figures are indicative of an audience that is becoming more educated about the terms and conditions associated with online bingo bonuses.

Table 5: When joining a new bingo site, would you rather...

	2017	2018
Receive no bonus - withdraw winnings at any time	61%	55%
Receive bonus - no withdrawal until wagering requirements met	39%	45%

Figure 6: Minimum value of winnings before player will make a withdrawal



*Survey of WhichBingo visitors, December 2018.
The survey received a total of 268 responses.

Playing habits

Online bingo is a regular pastime according to our survey, with 88% of players playing at least once a week, up from 79.5% when compared to 2017. We saw a big increase in the number of people who play bingo every day (44%), as well as a significant increase in the average length of time played during a session.

Figure 7: How often do you play online bingo?

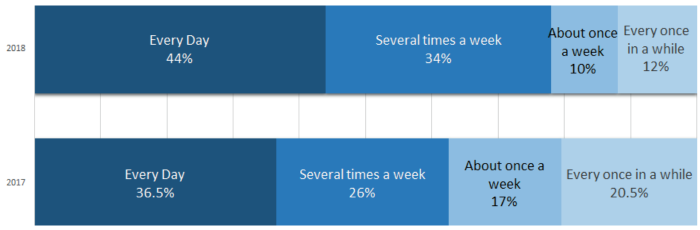


Table 6: How long do you play for in one sitting?

	2017	2018
Less than 30 mins	9.5%	6.5%
30 mins to an hour	27%	17%
1-2 hours	32%	31.5%
2-3 hours	14%	24%
3-4 hours	9.5%	11%
4+ hours	8%	10%

It should come as no surprise that slots continue to grow as a popular game amongst online bingo players, which could be reflective of more brands putting slot titles front and centre in bingo lobbies and home screens.

Table 7: Do you play any other forms of online gambling? (Multiple choice)

	2017	2018
Slots	62%	69%
Scratch / Instant Wins	31%	20%
Lottery	20.5%	16%
Horse Racing	6.5%	6%
Roulette	9.5%	7%
Blackjack	6%	3%
Sports Betting	9%	5%

Player psychology

Online bingo has long been perceived by the public as a form of entertainment rather than pure gambling, as reflected each year in our final question; "Would you describe yourself as a gambler?" For the third consecutive year, most players answered 'no' when asked this question.

Table 8: Do you consider yourself to be a gambler?

	2017	2018
Yes	38%	44%
No	62%	56%

Trust

As a reviews site, WhichBingo provides a variety of information about each online bingo site in the UK market. We asked our players what information they look for when considering a new site to join. Interestingly, almost half of all players said they looked for real player reviews.

Table 9: What information are you interested in when researching a bingo site?

Sign up offer	59%
Real player opinions	46%
Terms and conditions	30%
Overall star rating	29%
Payment methods accepted	28%
Expert's review	21%
Software provider	19%
Images / Screenshots	6%
Gameplay video	5%

In addition, almost two-thirds (61%) of players said they were more likely to trust brands who publicly reply to player reviews on WhichBingo.

Table 10: Are you more or less likely to trust a bingo site that responds to player reviews?

More likely	61%
Makes no difference	35%
Less likely	4%

"...almost two-thirds (61%) of players said they were more likely to trust brands who publicly reply to player reviews on WhichBingo."

Bingo Sites and Software 2018

2018 saw a the total number of bingo brands in the UK market decline for a second consecutive year. The number of active online bingo brands stands at 395 down from 421 the year before.

WhichBingo is unique in the affiliate market in that we aim to review every single UK-facing online bingo brand, not just brands we are affiliated with. As a result, we keep an active eye on new brand launches, site closures and other changes within the industry that may be of interest to players.

Although many new bingo brands launched in 2018, the number of brands closing their doors was much greater, leading to an overall decline in total brands for the second year in a row.

Why are bingo brands in decline?

Increased taxation and regulation of the UK market has created an environment that is no longer commercially viable for many small operators. 2017 saw the introduction of new rules and regulations relating to advertising, taxes on bonuses, site design and social responsibility. The Gambling Commission, along with the ASA have begun to assert new powers by issuing large fines for non-compliance and misleading advertising.

Keeping up with all of the regulatory changes and compliance restrictions has been a huge challenge for the industry in recent years. It has taken nearly 18 months of hard work for these changes to be worked into the bingo platforms, and just as long for individual sites to ensure they are fully compliant.

As well as having to overhaul the 'cute' design trend that could appeal to under 18's, terms and conditions had to be made crystal clear and in plain view of any offer, with full details 'one click away'. Restrictions were also placed on the use of the term 'free' when related to bonuses that require a deposit, and sites have had to put measures in place to monitor 'VIP' players.

Some brands who were perhaps overly reliant on income generated by a small number of VIP players, are now suffering from the licensing requirements that state brands must obtain proof of income these customers – a request not always taken kindly.

New bingo sites

Given the impact of the above changes, it is not surprising to learn that only 23 new bingo sites went live during 2018 (see table 1). Initially, that figure could seem quite shocking, given past openings reaching the high 50's in a single year.

Analysis

Over the past four years, 8 Ball Games Limited have been the most prevalent white label bingo operator, launching

Table 1: New online bingo sites opened in 2018 by software provider

Software Provider	No.
Dragonfish	11
Jumpman Gaming	5
Cozy (ElectraWorks)	3
Playtech/Virtue Fusion	1
Bede	1
MrQ	1
Microgaming	1
TOTAL	23

dozens of new bingo brands into the market each year. However, in late 2018 parent company Stride Gaming took the decision to close the UK-based firm and move the brand assets to another of their companies, Netboost, which had an impact on the number of new brands we expected to see in 2018.

Dragonfish was the platform that launched the most new brands in 2018, thanks in no small part to their 'Real Bingo Network' which was the first to offer a no-wagering proposition in the new era of increasingly strict rules and regulations.

On the other hand, we witnessed a huge drop in the number of brands launching on Cozy software – a platform that in previous years would launch at a rate of more than one a month. This year we recorded only three new Cozy brands, which could be a reflection of how much the inability to offer large no-deposit bonuses has had on their business model. The acquisition of Cozy by GVC in late 2017 may also have had an impact on its 2018 operational priorities, resulting in less new brands being brought to market.

Jumpman Gaming jumped to second place following a lot of hard work. The operator ditched one network (Wheel of Slots), leaving 15Network and Jumpman Slots, and upgraded its bingo software. However, these two networks are now nearly identical, with just the landing page between bingo sites and slot sites being the only clear differentiation. Both have the same bingo rooms and the same slots.

New slot and casino sites

There are hundreds of slots but only a limited number of bingo rooms, which no longer comes as a surprise since we know that bingo players have always enjoyed slot games. The number of slots and casino sites that opened in the past year far surpassed the number of new online bingo sites, and these figures from Jumpman

Gaming are a great example: in 2018, 39 slots sites went live on Jumpman Slots, bringing the total to 76 overall on the platform. Only five new sites went live this year for 15 Network, plus three existing bingo sites that migrated to the Jumpman platform, for a total of 34.

New bingo platforms

It is extremely rare to see software developers enter the bingo market, but in 2018 we were promised three new bingo platforms from Yggdrasil, Pragmatic Play and Mr Q. While MrQ has now made it to market, we are still waiting for the first active sites on the Yggdrasil and Pragmatic Play platforms.

Both Yggdrasil and Pragmatic Play showcased their bingo products at ICE 2018 and so with a further 12 months of development and planning under their belts we expect to see some exciting launches in 2019.

Site closures

GVC closed a further five Cashcade brands on Dragonfish, and migrated the remaining two, Foxy Bingo and Think Bingo, to its newly purchased platform, Cozy, as part of its ElectraWorks subsidiary.

Many other operators and software providers also had to take a long hard look at liquidity and profitability, given the tax changes surrounding bonuses and restrictions to marketing activity, following the introduction of the GDPR regulations around data protection and privacy.

Jumpman Gaming took the opportunity to do this while upgrading the sites on its platform, and we expect GVC to do the same during 2019 to weed out the unprofitable Cozy sites in its portfolio.

Sites by software

Gamesys, Parlay, Bede and Jumpman all took time to evaluate their products and that resulted in a decrease in numbers for these big names. Dragonfish and Cozy still dominate, but these figures could change dramatically next year.

It seems that 2018 was very much a year for stepping back and taking stock. Operators needed to analyse what online bingo players are looking for and how to keep them entertained and returning, rather than relying on a quick hit from new players. Business owners are looking for a platform that can help them not only acquire players, but offer enough to ensure they become regular visitors. This means that some sites have also migrated platforms rather than just closing down.

What's in store for 2019?

We expect the trends of the past two years to continue, with fewer openings than closures, but are confident there will still be a steady flow of new brands to keep players happy. Rather than churning out dozens of brands a year, we expect

Table 3: Online bingo site closures 2018 by software provider

Software Provider	No.
Dragonfish	21
Jumpman Gaming	11
Parlay	5
Bede	4
Gamesys	3
Microgaming	2
Playtech / Virtue Fusion	1
Relax	1
Cozy	1

Table 4 – Online bingo sites by software provider

Software Provider	2018	2017	2016
Dragonfish	181	192	194
Cozy	113	106	95
Jumpman Gaming	34	42	41
Playtech / Virtue Fusion	31	31	42
Microgaming	8	9	10
Gamesys	6	8	13
Proprietary	5	4	4
Daub	4	4	4
Leapfrog	4	4	4
Bede	3	7	4
Relax	3	4	3
Parlay	2	7	10
B-Live Gaming	1	2	2
TOTAL	398	421	437

multi-brand operators will make greater investments in a smaller number of their most popular brands, which will likely result in the shutdown of older white-label sites.

The entry of Yggdrasil and Pragmatic Play to the online bingo market is being eagerly anticipated, but with Pragmatic Play, in particular, this may not lead to a batch of new sites. Instead, we anticipate that bingo will first be integrated into the slots and casino sites that already exist on their platform, before any fully dedicated bingo brands emerge.

We don't see too much in the way of innovations taking place in the industry as operators continue to adapt to the changing regulatory landscape, but we do expect no-wagering offers to become more common as brands do away with the extortionate wagering requirements of the past.

WhichBingo Awards 2018

The 'Oscars' of the UK online bingo industry took place at the Steel Yard, London on Tuesday 12th of June.

Over 150 guests were in attendance from top companies serving the UK bingo and slots market including Playtech, Gamesys, Microgaming, Ladbrokes Coral and Rank. They all turned out to network and discover who had been crowned this year's WhichBingo Award winners.

The evening began with a drinks reception, sponsored by Sun Bingo, before moving on to the main awards ceremony, where a total of 18 awards were handed out. After the formalities were over, the party continued late into the night including a fun casino featuring blackjack and roulette games

Heart Bingo were one of the biggest winners of the night, picking up the coveted Best Online Bingo Site and Best Chat Team awards for the second consecutive year in the player-voted categories. They also won Best Mobile Bingo Experience for the first time in one of the judged categories.

Not to be outdone, bingo giants Mecca Bingo also came away with three awards: Best Playtech Bingo Site, Best Customer Service and Most Socially Responsible Operator.

To reflect the growing presence of slots & casino content on the WhichBingo website over the past 12 months, we added new categories including Best Slots & Casino Site (Gala Spins) and Best Online Slots Game, which was picked up by rising star Red Tiger Gaming for their cheeky take on Donald Trump and Kim Jong-un in their hugely popular title 'Rocket Men'.

Other new awards this year included Best Marketing Campaign, which was claimed by Sun Bingo for their hilarious 'Are You Gonna Bingo?' TV campaign, and also Best Use of Social Media, which was won by Jackpotjoy for their Paddy McGuinness activity.

2018 Award Winners

Award Category	Winner
Best Online Bingo Site	Heart Bingo
Best Slots & Casino Sites	Gala Spins
Best Mobile Bingo Experience	Heart Bingo
Most Socially Responsible Operator	Mecca Bingo
Best Customer Service	Mecca Bingo
Best Online Slots Game	Rocket Men - Red Tiger Gaming
Best Online Bingo Software	Playtech
Best Marketing Campaign	Sun Bingo - Are You Gonna Bingo?
Best Use of Social Media	Jackpotjoy - Paddy McGuinness campaign
Innovation of the Year	Slingo Rainbow Riches
Best Online Bingo Chat Team	Heart Bingo
Best Playtech Bingo Site	Mecca Bingo
Best Microgaming Bingo Site	Dream Bingo
Best Jumpman Gaming Bingo Site	Lucky Cow Bingo
Best Dragonfish Bingo Site	Wink Bingo
Best Cozy Games Bingo Site	Lucky Ladies Bingo
Best Newcomer	MobileSlots.com
Best Affiliate Programme	Broadway Gaming

WhichBingo Awards 2019

Official plans for the 2019 WhichBingo Awards will be announced very soon.

If you wish to enquire about sponsorship opportunities, or if you wish to nominate your brand for an award, please contact awards@whichbingo.co.uk or for more information visit www.whichbingo.co.uk/awards/

"Heart Bingo were one of the biggest winners of the night, picking up the coveted Best Online Bingo Site and Best Chat Team awards for the second consecutive year in the player-voted categories."

Richard Flint Interview

Sky Betting & Gaming Chief Executive discusses responsible gambling

One of the major developments this year has been the introduction of GAMSTOP, who recently announced over 42,000 players had self-excluded via the system, and that 90% of UK operators have signed up to it. However, there has been some criticism that 10% are still operating without GAMSTOP in place. What are your thoughts?

I think it's only a matter of time before the remaining 10% of operators sign up. It's probably just a case of integrating their systems with the GAMSTOP system, which can take some time. It is likely to become a licencing requirement to have a national self-exclusion scheme that you are signed up to, so I don't see any alternative for the remaining brands that haven't plugged.

Another big news story recently was the 'whistle-to-whistle' ban on sports betting advertising that's been announced by the industry. Do you think it will make a difference?

I think it will make a bit of a difference in public perception. We think it is important that gambling companies can advertise, not least because we have been devoting a lot of our advertising to player protection tools that we offer.

TV advertising has contributed to an excess of gambling advertising during live sporting events compared to what the general public might think is right.

To address these concerns, Sky announced a reduction in advertising, as did the industry as a whole. I think the combination of these two announcements will reduce the volume and the perceived bombardment of people with gambling advertising, but it won't take gambling away.

Gambling is part of society, it is part of the dialogue that sports teams and sports commentators use. Banning gambling adverts is not going to take the gambling out of our society, but such action will reduce exposure to gambling. I think it will help, but it's not going to eliminate the presence of gambling brands when watching sporting events - and nor should it in my opinion.

There were two other announcements from outside the industry that could make a big impact. The first is Sky TV announcing that individuals will be able to block gambling advertising and second is Barclays becoming the first major bank to allow customers to block spending on gambling. Would you agree with these approaches as a way to combat gambling addiction?

Yes, I would agree. You have to realise that many other sectors and many other companies have a relationship with gambling and gambling consumers. I think for Sky TV customers to be able to block themselves from seeing gambling ads is a positive addition for them and for Sky. Equally for Barclays, Monzo and Starling customers (among others), being able to exclude themselves from gambling spend is another great option for people who want further controls to limit their gambling spend or don't want to spend any money gambling. All of these technological advances are big positives that help create a better, fairer, safe general consumer environment.

Talking now more specifically about SBG, tell us a bit about the £1m voluntary settlement in March that was agreed with the UK Gambling Commission.

We voluntarily notified the Gambling Commission, and then commenced an extremely thorough investigation - utilising the skills of many of our internal teams – to ensure that we were able to conclude the issue in the fairest manner possible to our customers. I think that the proactive and honest nature in which we approached the issue was reflected in the positive comments from the Gambling Commission when they released the settlement statement. But I think that was just one part of a much bigger cultural change we had in the company. It's happening in the sector, we're definitely not perfect but we're working hard to improve our systems, with many of our regulatory processes subject to much more scrutiny from internal teams such as Compliance, Audit & Risk Assurance.

> *"We think it is important that gambling companies can advertise, not least because we have been devoting a lot of our advertising to player protection tools that we offer."*

Later in the same year you then won the Most Socially Responsible Operator award at EGR. Tell us why you believe Sky Betting & Gaming won this particular award.

I think we've really changed the culture of the business over the past few years to be not just compliant, but also trying to do the right thing by players, and to tell players about all the tools that we've got available.

We ran some TV campaigns with Jeff Stelling that heavily focused on responsible gambling. "When the fun stops, stop" was one, and we had another which promoted the 'three simple tools' – deposit limits, cool-off periods and the profit and loss tracker. It was an industry first to put safe gambling front and centre, as opposed to having it at the end.

We have also been working hard to develop our models using data to spot customers with issues and interacting and intervening with them, and on occasions we either suspend accounts or limit spending because of concerning types of activity and levels of activity.

These two things are part of our cultural change which is connected to responsible gaming, which is what helped us win the award.

What do you think will happen over the next 12 months and what else can the industry be doing to meet the UKGC's goal of being the fairest and safest place to gamble in the world?

I think that there will be an ongoing focus in the area of affordability. Across the industry we all need to get better at making sure that a customer does not spend more than they can afford and being able to spot this if it occurs.

We've actually come a long way. If someone recognises they've got a problem and they want to self-exclude they've now got Gamstop and Gamban. We might soon have the ability to stop TV adverts in your house and you may also be able to stop your bank from letting you gamble online. All the constituents within the industry are harnessing technology advancements to provide a safer environment for our customers. So those are all big positives for people who recognise they've got an issue, but I recognise that collectively we need to do more to improve the effectiveness of these tools.

But there are a group of people who are gambling excessively, who don't yet admit it, or recognise they have an issue. These are the people the industry needs to be more proactive in interacting and intervening with – customers who exhibit concerning behaviours. That I think will be the focus going forward, and affordability and interventions to limit spending will be a big part of that.

There are quite a few moral issues tied up with that about personal responsibility and individual freedom, but I think that's the way we're going and personally I think that's the right way to go.

"Across the industry we all need to get better at making sure that a customer does not spend more than they can afford and being able to spot this if it occurs."

Slot Games Analysis

Ken Muir from iGaming Tracker looks at the most popular slot titles from 2018

In the UK, two segments dominate much of the online gambling market: sports betting and bingo. While each appeals to different audiences, and the crossover between them is limited, both online sports and bingo brands offer slot titles to their customers.

In this analysis we discover the most popular slot titles offered to bingo and sports betting customers, respectively. We also look at Playtech game content, since the company has a significant presence on exclusive sportsbook 'casino' tabs, and because the Playtech-owned Virtue Fusion platform can be found on many bingo sites.

Sites Analysed

First we looked at the bingo sites on Google that ranked in the top 10 for the term 'bingo' (Crown Bingo, Foxy Bingo. Gala Bingo, Lucky Pants Bingo, Mecca Bingo, Mirror Bingo, Sky Bingo, Sun Bingo, William Hill Bingo and Wink Bingo) and compared them to the top sports betting sites that ranked in the top 10 for the term 'football bet' (BetBright, BetFair, BetVictor, Betway, Bwin, Coral, Ladbrokes, Paddy Power, Sky Bet and William Hill).

It is important to note that many of the sports betting sites have multiple casino pages, for example 'Casino', 'Vegas', 'Arcade' etc. We used all of them for this analysis.

Top Ranking Games

Tables 1 and 2 show the top 20 games across each set of sites (bingo / sportsbook). We looked at the games in the top 10 positions of each page every day from 1st June to 31st December, 2018, and aggregated the data to get the top 20 positions. If a site has multiple pages with slot content (e.g. 'Vegas' and 'Casino'), each page was given equal weighting.

Only three games, Rainbow Riches by SG Digital, Cleopatra (IGT) and Starburst (Netent) feature in the top 10 in both charts.

Sports betting sites have sports-related content such as Top Trumps World Football Stars and Frankie Dettori's Magic 7 by Playtech. On the other hand, while Pig Wizard ranks highest for Bingo sites, it does not feature on the sports betting rankings. We can also see Blueprint provides different titles for different audiences, and as such, have content in each set of rankings.

The bingo rankings often feature TV-branded content such as Love Island, whereas aside from Deal or No Deal, TV-branded content does not feature on the sports betting sites

Table 1: Most popular slot games on the Top 10 bingo sites

Game	Supplier	Ranking
Rainbow Riches	SG Digital	1
Fluffy Favourites	Playtech	2
Cleopatra	IGT	3
Clover Rollover	Playtech	4
Starburst	Netent	5
The Pig Wizard	Blueprint	6
Tiki Paradise	Playtech Red	7
Rainbow Jackpots	Tiger	8
The Sun Winning Headlines	Playtech	9
Deal or No Deal Bingo	Endemol	10
Wish Upon a Jackpot	Blueprint	11
Love Island	Storm Gaming	12
Dynamite Digger	Playtech	13
Diamond Mine	Blueprint	14
Wild Gambler Arctic Adventure	Playtech	15
Game Set Cash	Playtech	16
Pie Toss	Playtech	17
Pixies of the Forest	IGT	18
Action bank	SG Digital	19
Da Vinci Diamonds	IGT	20

Table 2: Most popular slot games on the Top 10 sportsbook sites

Game	Supplier	Ranking
Starburst	Netent	1
Cleopatra	IGT	2
Age of The Gods	Playtech	3
Frankie Dettori's Magic 7 Jackpot	Playtech	4
Age of The Gods God of Storms	Playtech	5
Deal or No Deal What's In Your Box	Blueprint	6
Buffalo Blitz	Playtech	7
Rainbow Riches	SG Digital	8
Epic Ape	Playtech	9
Diamond Mine	Blueprint	10
Gonzo's Quest	Netent	11
Top Trumps World Football Stars	Playtech	12
Bonanza	Big Time Gaming	13
Irish Riches	Blueprint	14
Frankie Dettori Sporting Legends	Playtech	15
Fortunium	Microgaming	16
7s To Burn	SG Digital	17
Balls Fun Drops	CR Games	18
Fruit Stack Deluxe	Cayetano	19
Slots O Gold	Blueprint	20

Playtech Dominance

Playtech are unique in that they own Virtue Fusion, a major supplier of bingo software in the market, as well as having exclusive 'casino' tabs on the major sportsbooks. This means they have significant market share for casino content in both sportsbook and bingo sites. The acquisition of Quickspin and Eyecon, a games supplier who have developed some of the most successful slot titles in the bingo segment, reinforces their share in both segments.

Two of Playtech's titles emphasise their focus on content for both segments. Fluffy Favourites by Eyecon has consistently been one of the most popular games on bingo sites since its release in 2016. Likewise, Frankie Dettori's Magic 7 has consistently had a presence on sports betting sites.

Table 3: Playtech bingo rankings

Game	Brand	Ranking
Fluffy Favourites	Eyecon	1
Clover Rollover	Playtech	2
Tiki Paradise	Playtech	3
Dynamite Digger	Playtech	4
Wild Gambler Arctic Adventure	Playtech	5
Game Set Cash	Playtech	6
Pie Toss	Playtech	7
Britain's Got Talent Superstar	Playtech	8
Shamans Dream	Eyecon	9
Genie Jackpots	Playtech	10

Fluffy Favourites

Tables 4 and 5 show the top-ranking games for bingo and sports content divided into two groups; those games that are on 'Playtech only' casino pages and Playtech games that are on 'non-exclusive' pages (contains games from multiple slot providers). On the sports pages, Quickspin content is present on 'non-exclusive' pages such as the 'Coral slots' page. Whilst Playtech has content on these 'non-exclusive' pages (which is increasing), the majority of their content is on pages exclusively containing Playtech games, such as 'Bet365 Casino' and 'Sky Casino'.

Table 4: Playtech sportsbook ranking (exclusive pages)

Game	Brand	Ranking
Age of The Gods	Playtech	1
Frankie Dettori's Magic 7 Jackpot	Playtech	2
Age of The Gods God of Storms	Playtech	3
Buffalo Blitz	Playtech	4
Epic Ape	Playtech	5
Top Trumps World Football Stars	Playtech	6
Frankie Dettori Sporting Legends	Playtech	7
Baam Boom	Playtech	8
Age of The Gods King of Olympus	Playtech	9
Call of the Valkyries	Playtech	9

Table 5: Sportsbook ranking (non-exclusive pages)

Game	Brand	Ranking
Eastern Emeralds	Quickspin	1
Genie Jackpots	Playtech	2
Chilli Fiesta	Playtech	3
Big Bad Wolf	Quickspin	4
Ark of Mystery	Quickspin	5
Tigers Glory	Quickspin	6
Hold The Safe	Eyecon	7
Dwarfs Gone Wild	Quickspin	8
Hidden Valley	Quickspin	9
Safe Cracker	Playtech	10

In summary

The type of slot content differs between bingo and sports segments, with bingo (unsuprisingly) containing more titles appealing to a female audience. Playtech have the largest share of content on both sports and bingo segments, which comes as no surprise given how dominant they are in the industry, and in the bingo sector especially.

igtracker

Author contribution
This article has been written by Ken Muir who is Director of iGaming Tracker, a company who provide market intelligence software for suppliers and operators in the gambling sector. www.igamingtracker.com/

Industry Predictions 2019

We asked some of the prominent and leading figures in the online bingo industry for their comments and predictions for 2019.

**Keir Hutton-Ferris,
Marketing Strategy Manager - Kindred Group**

The next two years will see marketing conditions get increasingly challenging through continued regulatory scrutiny, hardening public sentiment and a clamp-down on bonuses. Whilst the "death of bonuses" debate has been going on for a while, regulators in Sweden, Belgium and Denmark are actively restricting them this year, and other markets will likely follow suit. This will hit small operators hard but could also quicken the current move to better use of data, greater creativity and increasing product differentiation.

Mecca's launch of a "fairer" game format in 2018 resonated in a low RTP product like bingo and other operators will likely follow suit with new formats and functions that aim to increase stickiness and the sense of winning. New software by Pragmatic Play, Yggdrasil and Lindar show that the industry still has plenty of growth, but increasingly operators will be looking outside of the UK. The US, Nordics and outliers like Brazil will be interesting to watch as bingo operators compete to gain market share in faster growing regions.

2018 in the UK saw a Minister resign over delayed gambling legislation, the head of the NHS slam the industry and the Gambling Commission hand out hefty fines for KYC and RG failings. At last year's Bingo & Slots Summit there was a generally agreed prediction that we would see a well-known UK operator lose their license. While this hasn't come to fruition (at the time of writing), a similar prediction would probably be fair for 2019. Customers, the press, investors and regulators are going to continue to demand better player protection and bingo operators that fail to invest in this are going to have a difficult time in 2019/20.

**Kevin McGinnigle,
Managing Director - Positively Distinctive Media Ltd**

Brand owners and operators will be focusing (or should be) on three areas in 2019:

First, they'll be looking for ways to reduce their tax liabilities following the 40% POCT increase due in October. Those who fail to take their learnings from POCT2 will suffer, leading to M&A opportunities. I believe this will pave the way for game, product and player experience innovation as operators look to restrict or eliminate bonus funds altogether.

Second, the above will lead to a significant focus on player retention and re-engagement. In my 10 years in the iGaming space, I don't think there's ever been a more important time to ensure you are efficiently extracting maximum value from your player base. Compliance, regulation and tax burdens will force people to think differently on how they engage with their customers and will pave the way for those who are dynamic and agile enough to provide new ways to attract, engage and reactivate players.

Finally, I believe we will see a resurgence of bingo from those in the casino/slots space, as we witnessed towards the end of 2018. The introduction of maximum FOBT stakes and increased pressure on operators to comply with source of funds regulations means relying on high cost, high value casino/slot players is a risk. Plus, what else will come our way? We've already seen Belgium apply a maximum deposit limit; is this the start of the future? Those who understand the full extent of value in bingo will be in a strong position to capitalize on the ever-changing iGaming landscape.

"... I believe we will see a resurgence of bingo from those in the casino/slots space, as we witnessed towards the end of 2018."

Ben Starr,
Managing Director - 15 Marketing Ltd

TLDR: Nothing much will happen as operators keep pace with regulation.

As the tax rate jumps to 21%, belt tightening will be a common theme across all departments; marketing budgets will reduce and bonusing will be stricter.

Gamification and real time rewards will continue to be a priority for retention departments who are tasked with extracting more player value and longevity, without blindly bonusing the masses. Focus will shift away from VIPs as responsible gaming, AML and source of funds checks tighten.

Despite the raft of fines and actions issued in 2018, compliance and regulation haven't peaked and will remain hot topics throughout 2019. In a world of unlimited resource, these topics go hand in hand with innovation and user experience. However, with rule-setters generally removed from commerciality and practicality, remaining compliant within a constantly evolving set of guidelines takes up a colossal number of work-hours, meaning that major innovation in the industry is probably unlikely in 2019.

Display, TV and print will continue to follow the format of radio adverts where half of all real estate is taken up by small print.

With 5G around the corner, perhaps we'll see more immersive mobile content.

White labels will continue to launch in a prolific manner as the progressive marketing they employ allows them to flourish in a marketplace where the big guns are slow to move and perhaps distracted by the bright lights of the US and other jurisdictions.

Perhaps by the end of 2019, we will see an industry considered genuinely responsible.

Simon Collins,
CEO - River iGaming UK

The year 2018 will be remembered as the year when artificial intelligence (AI) hit the mainstream, in 2019 and beyond it's going to be everywhere especially in gaming.

January last year was white hot for anything crypto but this year it seems to be slightly less popular as a topic (to say the least). A rise in the value of Bitcoin and other crypto tokens (which crashed in 2018 in spectacular fashion) would boost interest in this new tech once again.

The value of provably fair is something which crops up often in relation to blockchain powered gaming - an online game can be considered provably fair if there is a mechanism in place, which allows the players to confirm the fairness of the game process. In the original online gambling software, the entire gaming process takes place behind-the-scenes and often needs the verification of a third party such as PWC (an accounting firm) or test labs.

Reports throughout 2018 of many private and commercial or industrial blockchain initiatives failing to demonstrate much practical value has not helped expand the use of blockchain in gambling software.

BUT is blockchain gaming dead? I think not. The principle of a distributed ledger, secured by encryption, providing a record of transactional activity, holds a tremendous amount of potential value, especially for gaming propositions.
In 2019 there will be more blockchain powered gaming offerings and it will be fun to see how much it can be used moving forward.

"... is blockchain gaming dead? I think not. The principle of a distributed ledger, secured by encryption, providing a record of transactional activity, holds a tremendous amount of potential value, especially for gaming propositions."

Contacts

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The research and comment featured in this report is based on qualitative, quantitative and semi-structured industry comment conducted in December 2018 unless otherwise stated within. To download additional copies of this report please visit: www.whichbingo.co.uk/reports/

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