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ONLINE BINGO
ANNUAL REPORT
2020



XLMedia PLC

“2020 will be the year of opportunity for those who are able to both remain compliant and evolve their product in a way which makes it more engaging, intuitive and unique.

Kris Kukula, Jumpman Gaming (Industry Predictions, p30)

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Introduction

I am delighted to write this for the first time as Group CEO of XLMedia and welcome you to the fifth edition of the WhichBingo Annual Report. Here we present 2019 UK online bingo player insights, expert analysis, WhichBingo Awards winners, survey data, and predictions of online bingo's future. This year, we saw the online bingo industry face new regulations, causing a change for the better. In a time of increasing regulation, WhichBingo stands out as a key site in helping brands adapt and meet new guidelines. Further regulation in the market helps create long-term sustainability and our ability to embrace new regulation ensures greater profitability for our sites in the space.

The emphasis placed on producing quality content and providing value for our users has been at the core of WhichBingo's success in 2019. In 2020, we will be doubling-

down on this approach, as well as actively harnessing AI and Machine Learning to further personalise the WhichBingo experience. The incorporation of the latest technology combined with a renewed dedication to providing quality content will be crucial for our operations and ensuring we continue to be the leading performance publishing group. We send our congratulations to UK market leader Tombola for retaining their title as Britain's Biggest Bingo Site. We will continue to watch other major brands with interest as they evolve to create the best user experience possible. As we head into 2020, we are confident that the success and popularity of online bingo will continue to grow.

Stuart Simms
Group CEO, XLMedia PLC



XLMedia PLC

What's in this report?

The fifth edition of the WhichBingo Annual Report illustrates our continuing commitment to publishing in-depth analysis of the state of the UK online bingo industry.

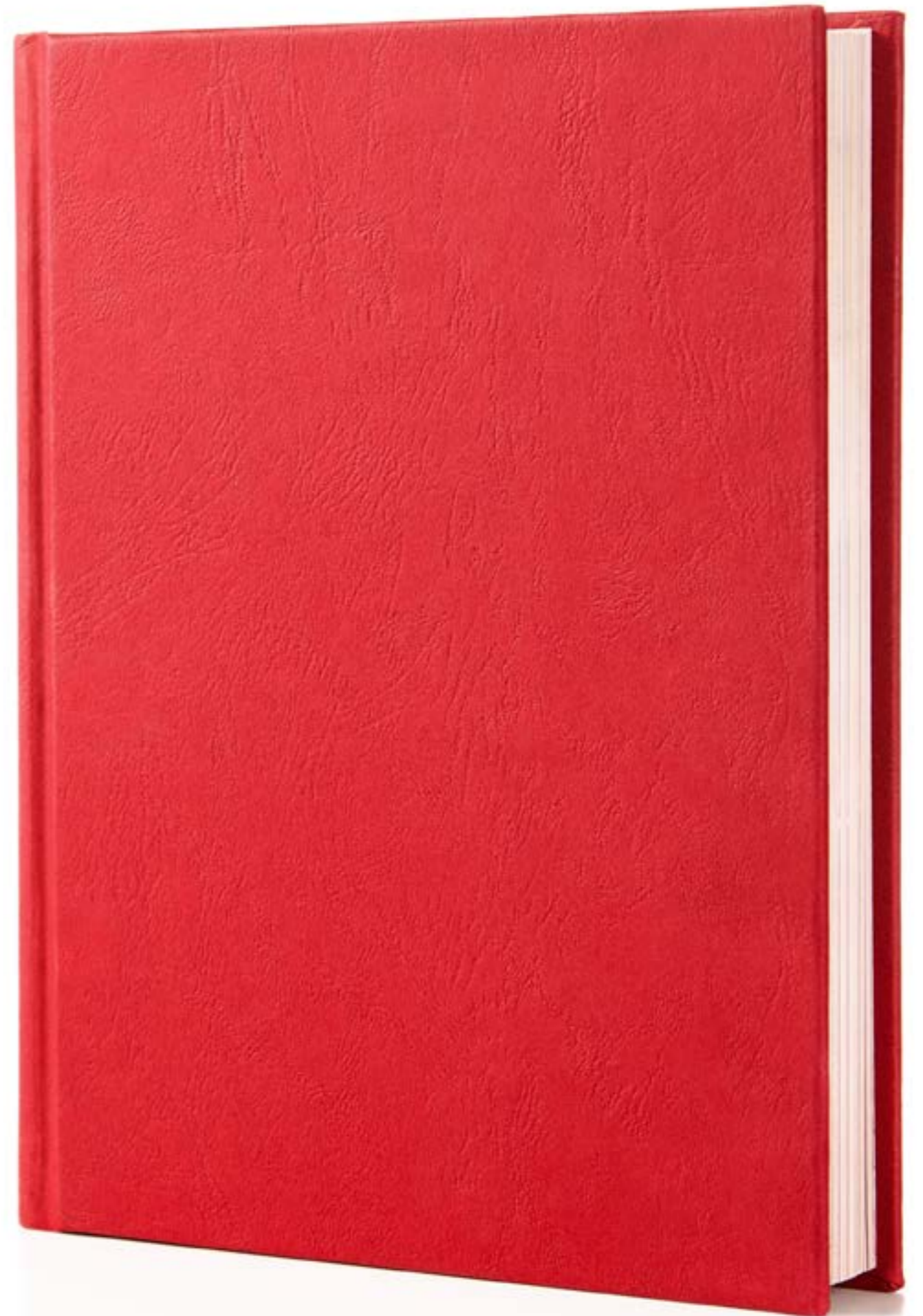
Featuring opinions from the industry's leading players alongside evaluations of the latest trends and data, this is what you need to know about UK online bingo in 2020.

This year's annual report maintains a tradition of collaboration with industry experts, providing a unique view of the state of the UK online bingo market as we move into a new decade.

The online bingo player's survey results are back for another year, plus we look back at the 2019 WhichBingo Awards and bring you our commentary on the bingo site launches and closures of the past year.

There is a unique study into player numbers at 20 of the UK's biggest sites and networks, offering a range of intriguing insights including which truly is 'Britain's Biggest Bingo Site'.

Rachel Swann from 3Radical discusses the importance of player retention and loyalty tools in an increasingly competitive market.



And we have an exclusive interview with Savvas Fellas, the founder of Mr Q.com, who discusses the challenges of launching his own proprietary bingo software.

Finally, you'll find our regular 'industry predictions' section, which this year includes contributions from Simon Collins (News UK), Kevin McGinnigle (PDM Ltd), Kris Kukula (Jumpman), Rhys Owen (Mutuel Play) and Savvas Fella (MrQ.com). Each offers a fascinating glimpse into what we can expect for the year ahead.

About WhichBingo

Widely recognised as the UK's leading resource for online bingo players, WhichBingo has been at the forefront of the market since 2004.

Having evolved into the sector's foremost marketing partner, WhichBingo is now considered the undisputed industry authority. This has been underlined by the success of the annual WhichBingo Awards, the most recent of which was held at Madame Tussauds London in June 2019.

Named EGR's 'Best Bingo Affiliate' in 2015, 2016, 2017 and 2019, and the 'Best Bingo Site' in 2016, 2017 and 2018 at the iGB Affiliate Awards, WhichBingo continues to be a force to be reckoned with in the bingo sphere.

Online Bingo Player Survey

These are the key findings from the 2019 WhichBingo Player Survey*



Demographics

Online bingo has long been a primarily female dominated activity, and our survey for 2019 shows no real changes in this regard. The gender split between our participants was 78% female to 21% male. There were no massive changes in age group either, with almost 80% of those surveyed falling between the ages of 35-64

Table 1: Online bingo players by age group

Age range	% of players
18-24	1%
25-34	17%
35-44	25%
45-54	26%
55-64	27%
65+	4%

Membership

Last year we reported a drop in player promiscuity, and this year we see that trend continuing. The number of players with accounts at more than 10 different bingo brands has dropped from 22% in 2017 to just 10% two years later.

Table 2: How many sites are you a member of?

# of accounts	% of players
One site only	28%
2 - 5 sites	40.5%
6 - 10 sites	21.5%
11 - 15 sites	5%
16+ sites	5%

Most popular bingo brands

Amongst those surveyed, tombola came out as the most popular brand when asked who their favourite online bingo site was. Six out 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. Buzz Bingo's position as the second most popular site is notable considering 2019 was only their first full year in operation.



*Survey of WhichBingo visitors, Q4 2019.
The survey received a total of 290 responses.

Table 3: Most popular bingo brands

Brand	Software
Tombola	Proprietary
Buzz Bingo	Playtech
Mecca Bingo	Playtech
Sky Bingo	Playtech
Gala Bingo	Playtech
Heart Bingo	Gamesys
Jackpotjoy	Gamesys
Sun Bingo	Playtech
Foxy Bingo	GVC
William Hill Bingo	Playtech

Figure 1: Average monthly deposit values



Spending habits

This year’s survey suggests that players are depositing less on average than they did in 2018. The number of players who said they deposit more than £50 per month fell from 45% to 27%. However, these figures were roughly in line with what we saw from the 2017 survey from two years ago (28.5%).

So what games do they spend the most money on? The most popular were of course online bingo games, with slot games in second place. However, the stats show an increase in the bingo game spend, as well as a small increase in casino spend.

This may be in part due to improvements in the bingo products over the last 12 months as well as the increased development of live casino games. It was surprising to see a drop in slots considering how many brands have pushed slot games to the forefront across their sites recently.

Table 4: Which games do you spend the most on?

Spends the most money on...	% of players	
	2018	2019
Bingo games	49%	57%
Slot games	45%	37%
Casino games	3%	5%
Scratch / Instant / Other	3%	1%

Devices

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Mobile play continues to dominate the market with the number of players who exclusively use their mobile phones to play increasing from 27% to 36.5%. Tablet- only is also on the rise, growing from 6% to 10%, with both laptop-only and desktop-only in decline.

Despite this, a third of players do not stick exclusively to one specific method, switching between different devices to play online bingo.

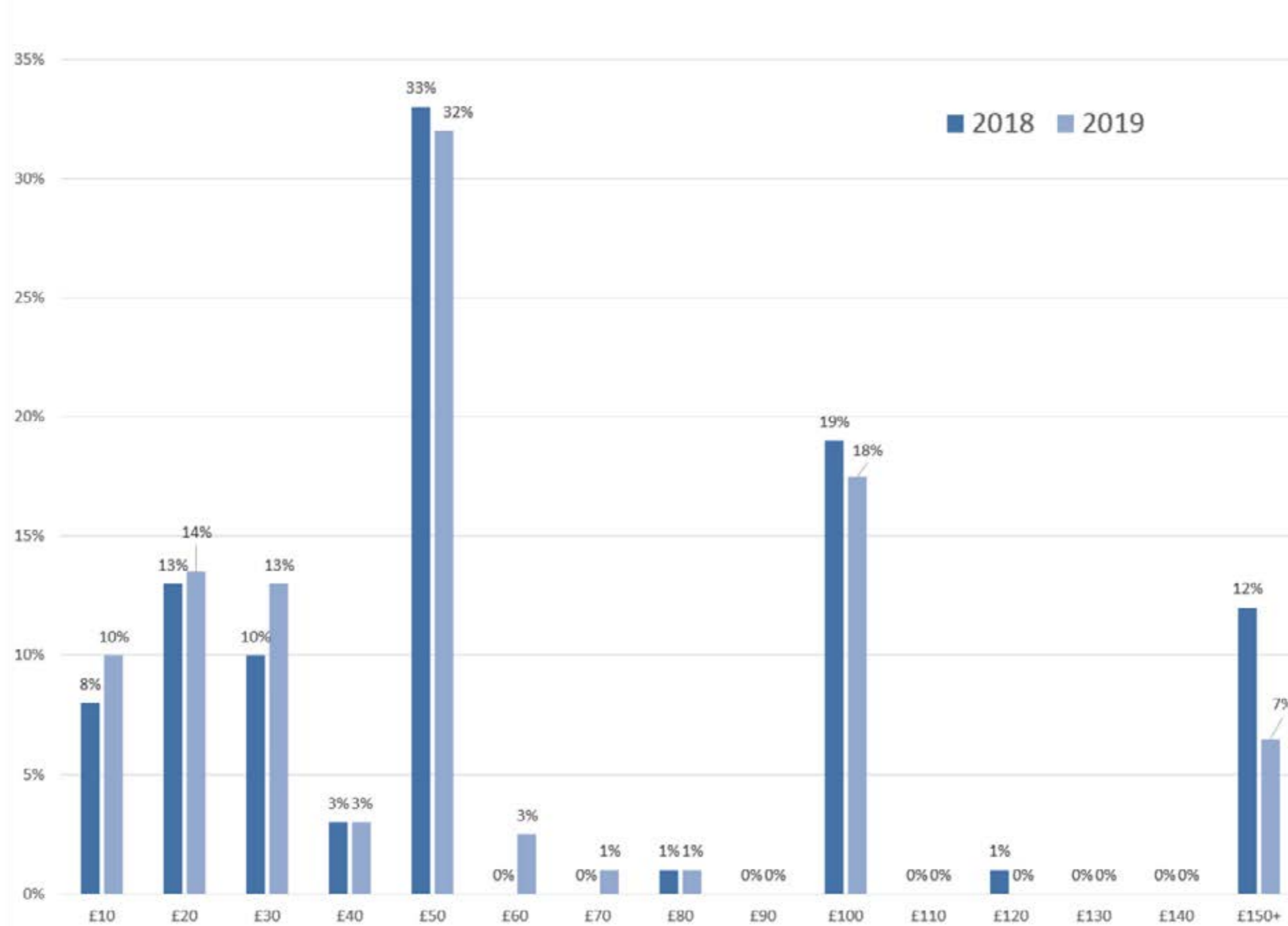
Table 5: Which devices do you use to play online bingo?

	% of players	
	2018	2019
Multiple devices	36%	29.5%
Only mobile	27%	36.5%
Only laptop	25%	18%
Only tablet	6%	10%
Only desktop	6%	6%

Withdrawals

Once again we asked players, “Is there an amount which you’ll only withdraw if you get above it?”. The results were almost identical to last year’s survey, with the mode average of £50 being the most popular response. This is in fact the third year running that £50 has topped this particular poll, which suggests psychologically there is something significant about this amount in the minds of bingo players.

Figure 1: Minimum value of winnings before player will make a withdrawal



“...psychologically, there is something significant about this value **[£50]** in the minds of bingo players.”



Playing habits

Online bingo is a regular pastime according to our survey, with 78% of players playing at least once a week, but this figure is down from 88% on last year’s results. The results indicate that players are playing less frequently than before, with those admitting to playing every day down from 44% to 29%.

Duration of play also seems to be on the decline, with a large increase in the number of people playing for shorter time periods on each occasion.

Table 6: How often do you play online bingo?

Frequency of play	% of players
Every day	29%
Several times a week	34%
About once a week	15%
Every once in a while	22%

Table 7: How long do you play for in one sitting?

Duration of play	2018	2019
Less than 30 minutes	6.5%	10%
30 mins to an hour	17%	32.5%
1-2 hours	31.5%	32%
2-3 hours	24%	13%
3-4 hours	11%	7.5%
4+ hours	10%	5%

Table 8: Do you play any other forms of gambling? (multiple choice)

	2018	2019
Slots	69%	57.5%
Scratch / Instant Wins	20%	35%
Lottery	16%	26%
Horse Racing	6%	10.5%
Roulette	7%	9%
Blackjack	3%	6%
Sports Betting	5%	6.5%



Wagering and bonuses

This year’s survey results, in regard to sign up bonuses, saw an increased preference from players for ‘no wagering’ style offers.

Just over two-thirds of players surveyed said they would rather receive no bonus at all, so long as they could withdraw their winnings at any time. Only 8% of those surveyed said they didn’t understand what wagering requirements are, which shows that the market is now wise to these most prevalent of terms and conditions.

Table 9: When joining a bingo site, would you rather...

	2018	2019
Receive no bonus - withdraw winnings at any time	55%	67.5%
Receive bonus - no withdrawal until wagering requirements met	45%	32.5%

Safe play options

Online bingo sites have a wide variety of tools available to players looking to gamble responsibly, such as setting deposit limits or self-excluding themselves for a set period of time. For the first time ever, we asked players if they had ever used any of the various safe play options available at their favourite online bingo sites.

Setting a deposit limit appears to be the most commonly used responsible gambling tool used by players, with over 70% having used this feature.

40% of players admitted to having temporarily prevented themselves from accessing their favourite sites by either using a cooling off period or temporary self-exclusion. 7% admitted to self-excluding themselves permanently, with less than 2% going so far as seeking help from GamCare or other gambling support organisations.

Table 10: Have you ever used any of the following 'safe play' options at an online bingo site? (multiple choice)

Responsible gaming tool used	% of players
Deposit limits	71.5%
Cooling off period	24%
Self-excluded temporarily	17%
Time-keeper	10.5%
Self-excluded permanently	7%
Contact GamCare (or similar organisation)	1.5%

Trust

When it comes to player confidence, 58% of those surveyed said they were more likely to trust a bingo site that publicly responds to player reviews on WhichBingo. If you are a bingo operator and would like email alerts whenever reviews are left about your brands, please get in touch.

Table 11: Are you more or less likely to trust a bingo site that responds to player reviews

	% of players
More likely	58%
Less likely	10%
Makes no difference	32%



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Bingo Sites & Software

2019 was a pivotal year for UK online bingo, with many of the sites that sprang up during the boom years falling by the wayside.

As we entered 2019 there was an air of expectation that the final year of the decade could end up being a bumpy ride for online bingo in the UK. But few foresaw the scale of change that the last 12 months have brought.

From 395 live sites at the end of 2018, there are now only 264! And with only 17 new sites opened and 131 closures, it really was a critical year.

Dragonfish dominates new launches

Although fewer than 20 new standalone bingo sites opened in 2019, over the past 12 months increasing numbers of casino sites began recognising the potential benefits of diversifying and adding online bingo to their platforms.

In this respect, the new Pragmatic Play bingo platform was adopted by Nektan and offered to their white label brands for a fee. So far, however, we have only seen one brand open with 'bingo' in its name – Flip Flop Bingo - and this is the one we are treating as a 'new bingo site'. There are four more pencilled in to open soon.

Dragonfish remains the most popular online bingo platform, although Jumpman Gaming came a close second. Both platforms have streamlined their offerings and are meeting the new regulatory reforms head-on and handling them well.

Table 1: New bingo sites opened in 2019 by platform

Software Provider	Number of new sites
Dragonfish	8
Jumpman	7
Gamesys	1
TOTAL	16

Pragmatic spearheads new bingo platforms

Pragmatic Play's partnership with Nektan is still in its infancy so it remains to be seen if this new online bingo lobby creates enough public interest to spawn some dedicated online bingo sites using the software.

Jumpman Gaming conversely appears to be moving away from traditional online bingo games and adopting the automated method of single-player bingo games that have been developed under the umbrella of Bingo Millions.

With the Jumpman Gaming bingo rooms only operational at limited times the Bingo Millions automated games allow players to access online bingo without a need for a minimum number of players in the room.

They also offer more chances to win a prize, with the pay-out dictated by the number of calls until the player actually achieves a win.

Yggdrasil went back to the drawing board in 2019, but we are expecting an enhanced bingo product from them during 2020.

Bingo site closures spurred by M&As

The change in ownership at Stride Gaming was emblematic of an overriding industry trend which saw large companies streamlining their operations over the past 12 months. In 2018 Stride Gaming was actively acquiring new sites. But in 2019 the company was itself acquired by Rank Group.

This, in turn, sped up the housekeeping that such purchases naturally bring about. The large number of closures can be attributed to the identification of unviable sites following the purchase by Rank – bearing in mind that would have included the old 8Ball Games portfolio that had been very active in opening and acquiring any and all available online bingo sites for a long time.

At the opposite end of the scale, the 'one-man-band' type of operation which was so attractive and prolific from 2014 – 2017 as online bingo was seen as an easy way to run a profitable business, became totally unviable. Many operators took the decision to close their doors, but many more had the decision made for them by ElectraWorks.

Table 2: Bingo site closures in 2019 by platform

Software Provider	Number of closures
Dragonfish	32
ElektraWorks (ex Cozy Games)	87
Playtech	11
Relax	1
TOTAL	131

ElektraWorks slashes former Cozy Games sites

No-one could have foretold that the new owners of Cozy Games, ElektraWorks (owned by GVC) would scale back the online bingo operation so drastically – 95% of its bingo brands to be exact - especially after market leader Foxy Bingo had migrated to that platform, giving it a strong vote of confidence.

This now leaves Dragonfish far and away the market-leading online bingo platform. They only felt the loss of 15% of their total bingo sites and also saw confidence in them continue as operators did open some new bingo sites with them.

Hot on the heels of JPJ Group completing the acquisition of Gamesys Holdings we get a new brand launching on Gamesys software, the first for quite some time and this is very encouraging news. Gamesys has an interesting bingo platform with a great team continually innovating and improving the bingo model, so it will be interesting to see if more operators adopt the software.

What's in store for 2020?

That really is the \$64,000 question. We believe that this year operators are going to display renewed confidence in the online bingo product.

The market is now much more streamlined and anyone who focusses on this particular audience should do well. Bingo players like the perceived gentler nature of gambling at an online bingo site, although they do like to play slot games.

The correct promotions and strategic targeting of offers that new technology makes possible means that reactivation of players demotivated by the past two years of stagnation should be a real possibility.

Decent welcome offers should also make a comeback for anyone wanting to attract a decent standard of player. The free bingo tickets to fixed games at fixed times has not captured player imagination and is leaving them distinctly unimpressed.

We are still expecting to see some new bingo software launches in 2020 now that confidence in the market is rising again and we hope that this will be seen in true online bingo sites and not just as add-ons to casino sites.

Following the last two years of consolidation and realignment of the market, we are confident that 2020 will see a resurgence in the success and popularity of online bingo.

Table 3: Bingo sites by software provider

Software Provider	2019	2018	2017
Dragonfish	150	181	192
ElectraWorks (ex Cozy)	18	113	106
Jumpman Gaming	41	34	42
Microgaming	8	8	9
Gamesys	7	8	9
Proprietary	3	5	4
Daub	4	4	4
Leapfrog	4	4	4
Bede	3	3	7
Relax	2	3	4
Progress Play (ex Parlay)	2	2	7
B-Live Gaming	1	1	2
Pragmatic Play	1		
TOTAL	264	395	421

WhichBingo Awards 2019

A look back at this year's winners from the Oscars of Online Bingo.



The WhichBingo Awards ceremony is one of the highlights of the year for the UK online bingo industry. It is a celebration of the best brands in the business, with a wide variety of categories voted by both online bingo players and industry expert judging panels.

Over 150 guests were in attendance at the glitzy June 2019 event, including leading companies serving the UK bingo and slots market such as Playtech, Gamesys, Microgaming, Ladbrokes Coral and Rank. They all turned out for an evening to remember at the stunning Madame Tussauds attraction in central London.

It was a big night for Gamesys with Jackpotjoy picking up the coveted 'Best Bingo Site' award, and Heart Bingo winning 'Best Chat Team' category for the third year in succession. They also claimed 'Best Mobile Site' for the second year in a row.

Playtech saw Buzz Bingo pick up a win for 'Best New Site' and 'Best Marketing Campaign', alongside Mecca Bingo who won the 'Best Customer Service' award for the third year running.



“...Jackpotjoy picked up the coveted ‘Best Bingo Site’ award, and Heart Bingo won ‘Best Chat Team’ categories for the third year in succession. They also claimed ‘Best Mobile Site’ for the second year in a row.”



Best Online Bingo Site
Jackpotjoy

Best Slots Site
mFortune

Best New Bingo Site
Buzz Bingo

Best New Slots Site
Dr Slot

Best Bingo Chat Team
Heart Bingo

Best Playtech Bingo Site
Gala Bingo

Best Microgaming Bingo Site
Dream Bingo

Best Jumpman Bingo Site
Viking Bingo

Best Dragonfish Bingo Site
Wink Bingo

WhichBingo Awards 2020

Official plans for the 2020 WhichBingo Awards will be announced very soon. If you wish to enquire about sponsorship opportunities or to nominate your brand for an award, please contact awards@whichbingo.co.uk or visit www.whichbingo.co.uk/awards/ for more information.



Best New Bingo Game
Age of the Gods Bingo - Playtech

Best New Slot Game
Around the Reels in 80 Wilds - Gamesys

Most Socially Responsible Operator
tombola

Best Mobile Bingo Site
Heart Bingo

Best Customer Service
Mecca Bingo

Best Bingo Software
Playtech

Best Slots Provider
Microgaming

Best Marketing Campaign
Buzz Bingo

Best Social Media
tombola

Savvas Fellas Interview



The man behind MrQ talks exclusively to WhichBingo about the challenges of building his own proprietary bingo software.

Tell us a little about yourself and how you got to the point where you decided you would develop and launch your own bingo product.

My background is in digital marketing. I worked in media agencies including MediaCom and learnt my craft there and then I stumbled into affiliate marketing from that, just to kind of flex a few muscles and figure it all out from an SEO perspective and I stumbled into the gambling space and then into the affiliate space.

Affiliates generally make the transition to white labels because you are a publisher and you take on advertisers, but if you are an affiliate and a white label, you are a publisher and an advertiser, so it felt fairly kind of natural.

So we did that and then we decided you know what, let's not just be the publisher and the advertiser, let's be the publisher and the advertiser and let's own the IP of the advertiser, because when you have that you can kind of tweak things as you see fit and you don't rely on someone else. So that's kind of the journey in a tiny little nutshell.

Launching your own bingo software sounds like a big undertaking.

It's huge! It's very, very, very big. I mean when we decided to do it I kind of spoke to a few people and they were like, "Listen, you really need to know what you're getting into!" and I kind of ignored it. So being naïve is good, but knowing that there's stuff that's going to come up that you need to learn as you go along, you need to know that and be comfortable with it.

We did it because as a white-label operator you work with all these different partners and for the most part a lot of them are built on old systems, old technologies and even the guys who are on the modern side are still patching it in places. Let's use modern technology and then hopefully that gives us the advantage of speed because we're small, we're lean, more agile and for the most part that's kind of worked exactly as it should have and is our advantage over the bigger more clunky pioneers.

It's huge! It's very, very, very big. I mean when we decided to do it I kind of spoke to a few people and they were like, "Listen, you really need to know what you're getting into!" and I kind of ignored it.

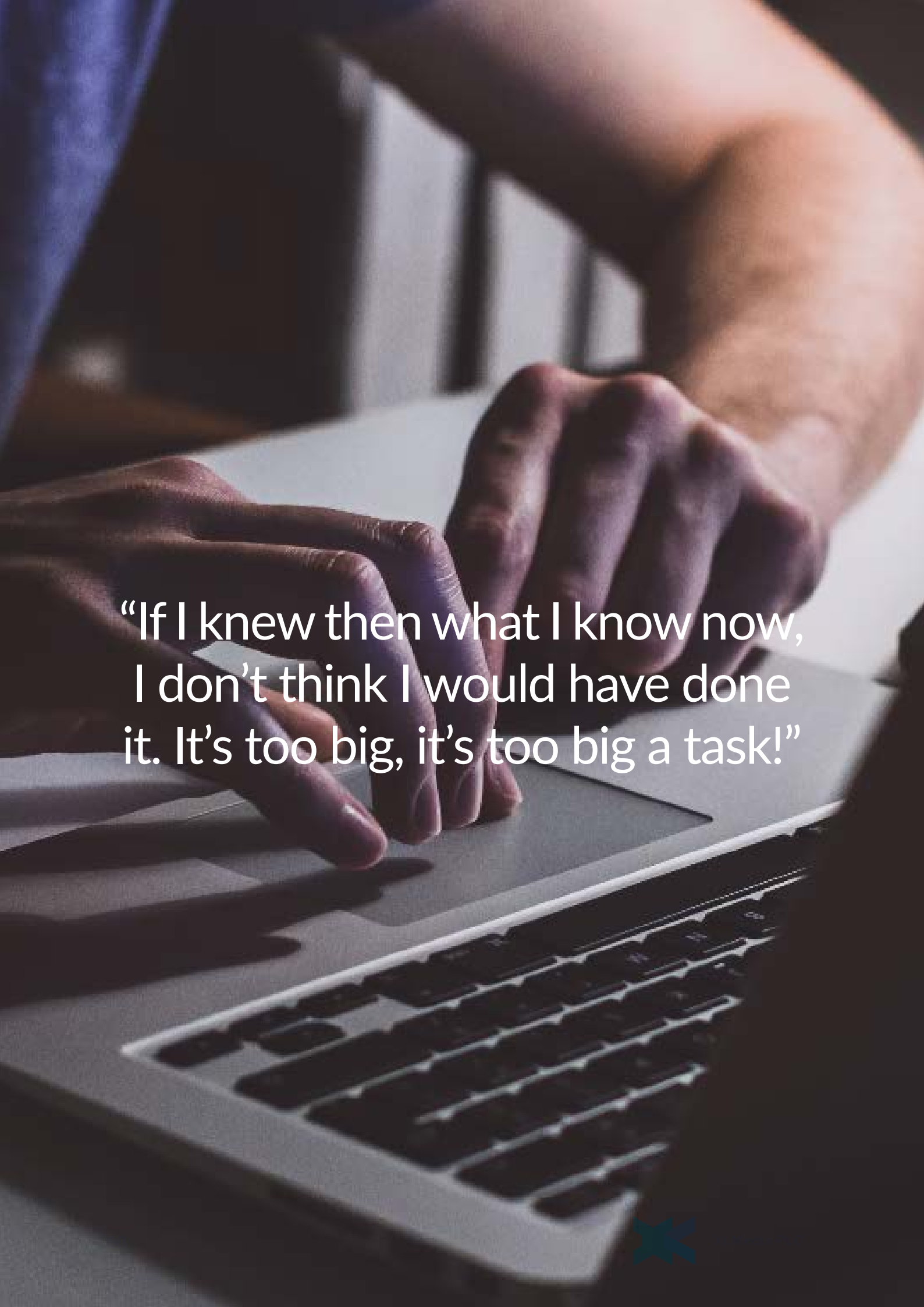
Was there ever a point which you thought maybe we can't do this or maybe we should cut our losses?

I always say if I knew then what I know now, I don't think I would have done it. It's too big a task!

At first, when you think about it, you think it's just a random number generator, it's a ticket generator and then you're pulling in third party slots, that's not that hard! And initially, we wanted to build a slot engine as well so I have our own RGS and to also build an affiliate platform, so we would own and control the entire ecosystem. And then you realize actually certain things just need to be given up to third party suppliers. Income access can do the affiliate side, a third party can do the slot side because to build an RGS is an intense build, especially when coupled with the challenge of bootstrapping the project.

So those lessons came in pretty quick and as you rework your strategy while you're on the move, a developer will no doubt ask "well have you thought about this?" About how the tickets are generated or how the balls are generated and the time between ball calls and the wallet and how the wallet talks to the tickets and how the wallet talks to the third party suppliers and have you got the contract for the third party supplies and have you got your gambling license and have you got your acquiring bank, and then the list just goes on and on and on and on.

It's a really good journey but you need to be prepared and I don't think we were. But it's a fun journey and it's better when you're live because you get to tweak the thing that you built, so it's rewarding, but it's hard work.



“If I knew then what I know now, I don’t think I would have done it. It’s too big, it’s too big a task!”

Have the regulatory changes of the last year or two affected your plans and have you overcome these obstacles that keep coming from the Gambling Commission?

I think it’s pretty intense and it kind of has to factor in when you build something like this. Bearing in mind we decided to build this before the landscape started getting as bumpy and as rocky as it is now. It just makes it that much harder.

Without a point of consumption tax at 21% I think it would have been a much easier ride for us. At 15% it is manageable, at zero you start to see, as an operator coming from a white label side of things, how the big operators got as big as they have.

To go from 15% to 21% in Remote Gaming Duty is big. Then you have the RG side of things, the source of funds, the AML checks. We sometime feel like the big operators are tripping over themselves a little bit just to kind of undo all of this legacy stuff that sits in the background, whereas for us it’s quite easy to manoeuvre around our codebase. So if credit cards were turned off tomorrow and the GC based on their consultation said, “Listen, no more credit cards,” we’re already prepared to make that change on our side although a lot of this logic will be handled by the card gateways and the acquirers. We can just turn it off in the click of a button and we have that advantage and that’s why we feel our platform is fairly modern and we have that as our USP, agility



What have you got on the site at the moment and what's next to look forward to?

Currently, there are five different bingo rooms. We've got a couple of different mechanics. You've got your 75 ball, you've got your 90 ball and then we have another mechanic which is a rollover mechanic, I really like this one; you buy a ticket and it's 75 ball bingo game, it's a coverall pattern and you have to get it in a certain number of calls. Now if you don't then the pot rolls over and rolls over and rolls over until someone wins it. It's a rollover bingo mechanic. So that there that's what we currently have. We're working on a number of different mechanics.

I'm not going to give away too much at the moment, but lots of different mechanics that will enhance the bingo experience and we're also going to focus on our chat service, it's been off for a while, just while we figure out the challenges around player liquidity in bingo; you need to get a good volume of people into the rooms before you can dig into the social aspect of it.

We've also recently gone live with a slots aggregator so previously we only had slots from two providers, Thunderkick and Eyecon, but now we have NetEnt, QuickSpin, Pariplay, IWG and Microgaming, so most of the key players. That should help with player retention as well.

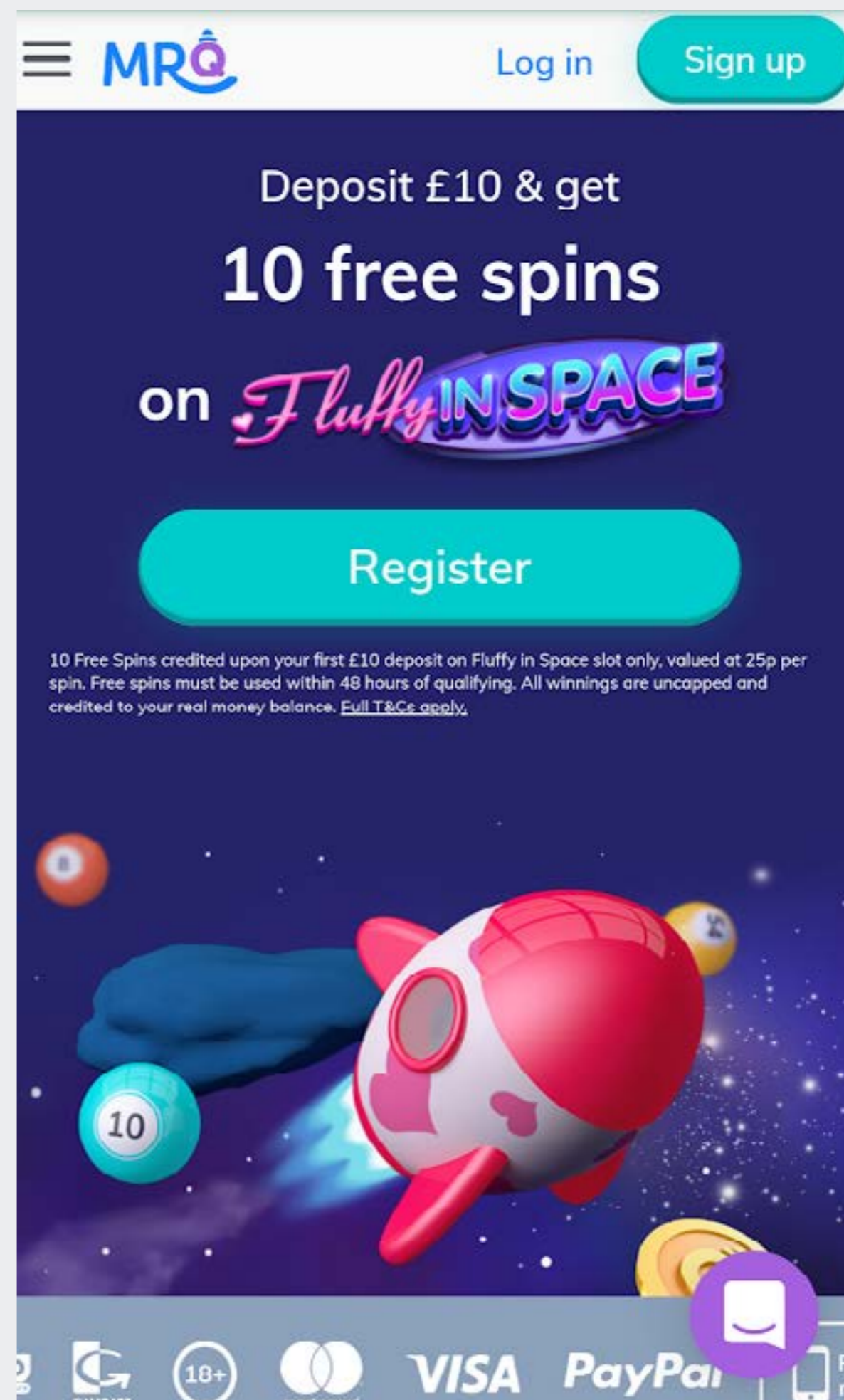
Is the 'no wagering' offers working for you?

It's good and I think everyone will get there eventually, but there's abuse in having no wagering. People come in, they use a code, they deposit, they get their free spins, they take the deposit out, so it introduces different problems that you have to be prepared for. A lot of bonus abuse but nothing's really changed there, it's just the way that the abuse happens has changed.

What did you do to attract players in the early days? Did you have seeded rooms? What about chat hosts?

Yes, we did try it early on. So we turned on the chat, we had seeded rooms and we had chat hosts and we also monitored it internally you know, profanities and stuff like that, although there are filters to manage that side of thing now. It was really nice to see, but you always knew that there was this agenda that they just want the seed; they just want to win the seed and then once the seed is turned off they're gone.

The other issue around chats is that most people are on mobile and figuring out what that UI UX looks like on mobile with chat, bingo, slots, the kind of the three big things that you need to have, is a big challenge. Someone who does it well is Gamesys. Gamesys UI UX is like, you know, it's the best out there in my opinion and so we haven't quite wrapped our heads around how we do that yet because we sacrificed the slot view on mobile while in a bingo room.



So whilst on desktop, you've got the three services (Bingo, Chat, Slots), on mobile you've got the two – chat and bingo. It doesn't seem that people chat much on mobile. I don't have too much insight into this, but it doesn't seem like you can do both at the same time to a good level of kind of competence where they're both nicely managed, so you've got to wrap your head around that side too.

Chat hosts are great but I think it just represents something that's bigger which is the social element of it and that's again where Gamesys just dominate. You know Playtech have great mechanics and you know it's creative in that sense, but Gamesys have created a community and have just led the social side so it goes beyond and it's much bigger than just chat hosts. It's like a social place where you'll want to go and socialize as well as have this entertainment element of it.

Are there any plans to move your other white-label brands to the MrQ platform?

Plenty have asked "why aren't you just licensing it out" "why aren't you just giving it to you know all these potential B2B partners or even doing more B2C brands?" It's really difficult to talk about this industry without talking about how much noise there is from all the white labels, when you strip it all back you've got a handful of software providers, I don't fully agree with but I'm also part of the problem in that I also have a white label business, and I don't want MrQ.com and the platform it's built on to feed into that side of things. I want to have good try at creating a brand that feels unique first and see how that goes before saying, 'do you know what, we're open for B2B business now'.

What's with the brand name? MrQ.com

I should have a better answer than the one I'm going to give you; three letter domains are just cool! Memorable and brandable. That's it.

This article is an abridged version of a longer interview conducted for the WhichBingo Podcast. To listen to the interview in full visit www.whichbingo.co.uk/podcast/

A close-up, slightly blurred image of the Union Jack flag, showing the red, white, and blue stripes and cross. The flag is draped and has a soft, wavy texture.

Who is Britain's Biggest Bingo Site?

Tombola have been claiming the title of 'Britain's Biggest Bingo Site' for many years, but is it true? We tasked UK bingo expert Wayne Howe to take a closer look at the numbers.

At the last count, WhichBingo reported there were a total of 264 online bingo websites in the UK market. We selected 20 of the most well-known and visible of these brands and monitored them closely each evening at the peak time of 9pm, to gather data on active player numbers. The following analysis goes into detail of our findings over the Christmas and New Year period (December 9, 2019 to January 8, 2020).

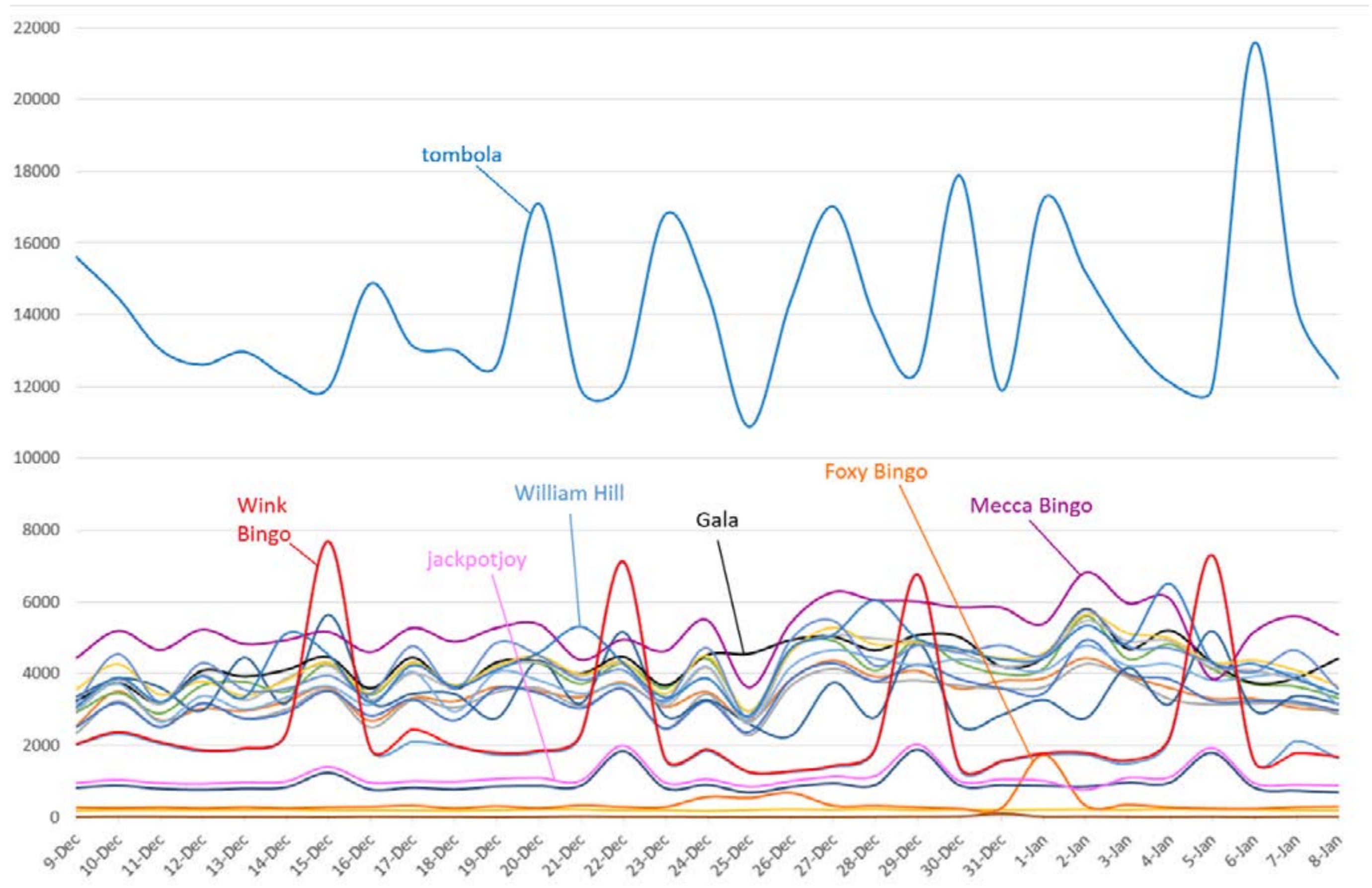
Tombola leading the pack

As you can see in Chart 1 below, when shown alongside the other brands, tombola's player numbers are consistently higher than their major rivals. The spikes in player numbers we observed throughout the month coincided with a regular pattern of CRM outreach which went out each Monday and Friday, pushing various on-site promotions and driving traffic to the site.

Tombola's highest count was recorded on January 6th, when it reached an incredible 21,571 players. This coincided with a special 'Treble Night' promotion in which the 9pm linked jackpot in bingo90 was trebled to £15,000.



Table 3: Bingo sites by software provider



Site rankings

Table 1 below displays the results of our study with player numbers averaged out across the 31 days. You can also see the individual highest and lowest player counts observed.

Tombola's lowest performing count of 10,884 players on Christmas Day was still over 4,000 players more than the best day achieved by 2nd-placed Mecca Bingo. This gives some perspective on the gulf in size between tombola and the rest of the market.

What's more, all of the remaining 19 brands in our study are part of a wider bingo network, which means their totals actually contain some proportion of players throughout their individual networks. For example, the Dragonfish brands Wink Bingo and 888 Ladies have almost identical player counts, due to their high proportion of networked rooms. They are practically the same site, albeit for one or two standalone rooms.

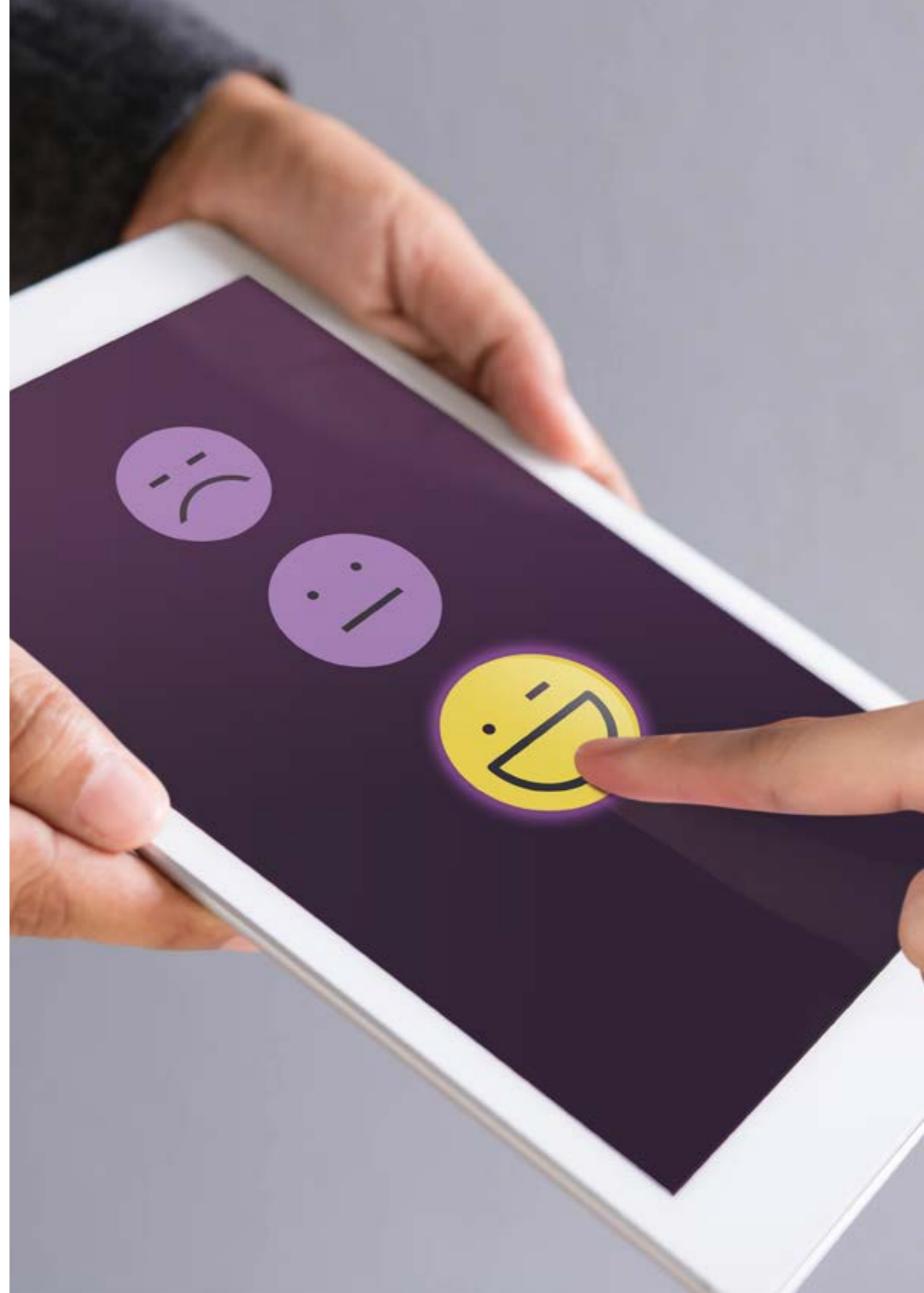


Table 1: Bingo site rankings ordered by average player numbers

Rank	Brand	Software	Player Numbers observed at 9pm		
			Average	Highest	Lowest
1	tombola	Proprietary	14043	21571	10884
2	Mecca Bingo	Playtech	5231	6802	3621
3	William Hill	Playtech	4307	6508	2840
4	Gala Bingo	Playtech	4304	5807	3160
5	Sky Bingo	Playtech	4240	5646	2957
6	Sun Bingo	Playtech	4231	5576	2757
7	Paddy Power	Playtech	4076	5461	2621
8	Coral Bingo	Playtech	3993	5592	2890
9	Ladbrokes Bingo	Playtech	3745	4770	2662
10	Costa Bingo	Dragonfish	3505	5645	2283
11	Bet365 Bingo	Playtech	3423	4433	2519
12	Buzz Bingo	Playtech	3342	4926	2385
13	Betfair Bingo	Playtech	3262	4267	2272

Table 1: Bingo site rankings ordered by average player numbers - Cont.

Rank	Brand	Software	Player Numbers observed at 9pm		
			Average	Highest	Lowest
14	Wink Bingo	Dragonfish	2536	7684	1253
15	888 Ladies	Dragonfish	2502	7670	1243
16	Jackpotjoy	Gamesys	1099	2020	756
17	Heart Bingo	Gamesys	952	1884	691
18	Foxy Bingo	GVC / ElectraWorks	349	1732	226
19	Butlers Bingo	Microgaming	201	228	162
20	Dove Bingo	Jumpman Gaming	18	82	8

Following our original month-long study, we decided to take another look at the Playtech-powered brands in order to gauge how many players are playing in the networked games as opposed to the standalone rooms.

With the exception of Mecca Bingo, who stand clear as the most popular Playtech site, the remaining brands saw between 79% - 96% of play taking part in the networked games (Table 2, right) as opposed to their standalone offerings. Chart 2 (below) shows how this translates into actual player totals.

Comparing the number of players in standalone rooms gives a greater impression of the relative brand power between each of the Playtech sites. Mecca of course stand out with 45% of players in standalone rooms. Betfair Bingo on the other hand have only 4%.

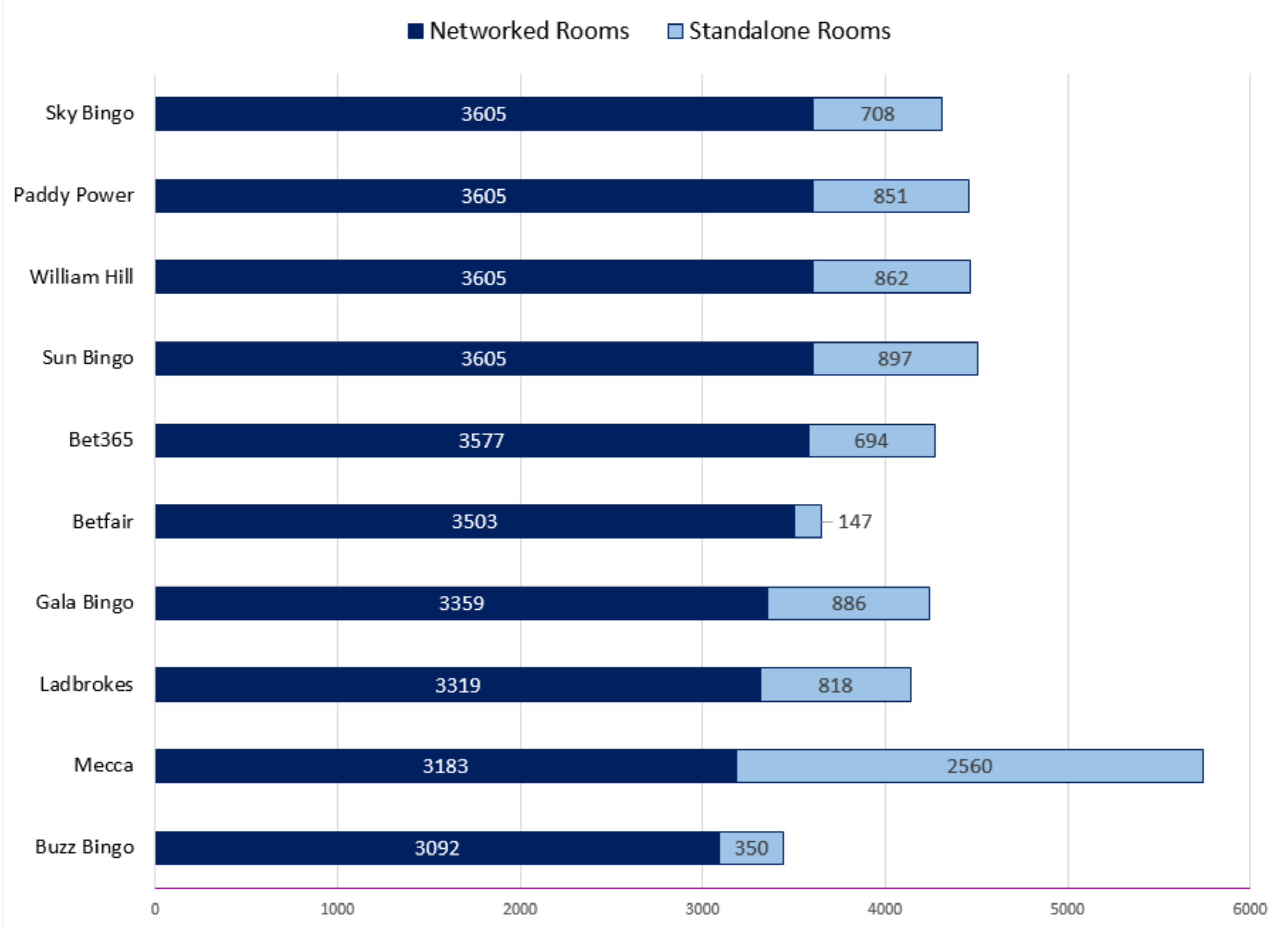
Coral Bingo are not included in these particular figures as they had by this point finished their migration to the GVC / ElectraWorks network.

Table 2: Percentage of players in networked bingo rooms across the Playtech brands*

Brand	% Players in Networked Rooms
Mecca Bingo	55%
Gala Bingo	79%
Sun Bingo	80%
Ladbrokes Bingo	80%
Paddy Power	81%
William Hill	81%
Sky Bingo	83%
Bet365 Bingo	84%
Buzz Bingo	90%
Betfair Bingo	96%

*Data for both charts on this page taken at 8pm on 14th January 2020.

Chart 2: Split of active bingo players at Playtech brands*



The other major software provider is Dragonfish, whose network consists of more individual sites than Playtech, but their total player numbers are much smaller.

Dragonfish sites rely a heavily on free bingo promotions, which are used as a reward for depositing players. However, if we removed all the free bingo games from our totals, it would make a huge impact to their rankings (table 3, right).

The smaller networks

Butlers Bingo (Microgaming) and Dove Bingo (Jumpman Gaming) were included in our study to provide insights into player numbers at two of the relatively smaller online bingo networks. The games at both sites are 100% networked, and so their figures actually show the numbers across the whole network, not just each individual brand.

Dove Bingo’s player numbers were the lowest in our study but not surprising given how difficult the bingo games are to find on their website. Even though it is positioned as a bingo brand by name, in reality the Jumpman sites are first and foremost slot sites, with a bit of bingo on the side.

Table 3: Player totals with and without free bingo (data from 9pm 5th January 2020).

Brand	Total players Including Free Bingo	Total players Excluding Free Bingo
Wink Bingo	7306	306
888 Ladies	7295	311
Costa Bingo	5192	313

GVC's expanding network

When GVC acquired Cozy Games in 2017 it allowed them to set up their own bingo network and slowly move their major brands to the platform. Foxy was the only major brand on the network during our study, and ranked in 18th place on our list (table 1, p20). Since then, Coral Bingo has migrated, and we assume Ladbrokes and Gala Bingo will follow in due course.

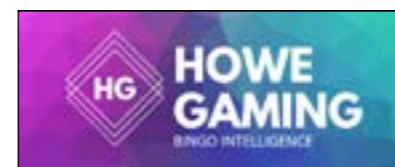
It will be interesting to see how this affects the rankings once all GVC owned brands have moved – if indeed that is their long-term goal. Major brands have switched platforms in the past, and it hasn't always gone down well with players who are often resistant and resentful of change.

Summary

What our study has shown is that tombola clearly are the market leader in the UK, and deserving of their 'Britain's Biggest Bingo Site' claims. However, making direct comparisons is difficult, due to how interconnected many of the brands are on the various networks. We will be watching GVCs expansion with great interest, particularly when the time comes for Gala Bingo to migrate. They may lose players, but overall it could work out better for them financially as owners of both brand and software.

Author contribution

The 'Who is Britain's Biggest Bingo Site' analysis in this report was written by Wayne Howe, Director at Howe Gaming (www.howegaming.com)



WhichBingo

Retention & Loyalty



With changes in UK gambling regulations making acquisition increasingly difficult, player retention and loyalty has become more important than ever.

Rachel Swann from customer engagement software provider 3radical gives her take on how bingo operators can improve both in 2020.

Retention and loyalty are notoriously difficult to achieve in any industry, but companies that get it right will always reap the benefits. The gambling industry has unique challenges and shifting the focus from acquisition to retention and loyalty is a sure way to tackle these challenges head on.

Whilst it is common knowledge that the gambling industry faces more challenges than most, there is one obstacle that stands out from the rest - monitoring and managing regulation and legislation, and making it work for the business.

Although regulation is very important for the long term sustainability of the industry it has also had a negative (short and long term) impact on most operators. In 2019 alone William Hill announced the closure of 700 retail stores following a revenue hit from the Fixed Odds Betting Terminal (FOBT) legislation, and some operators have left the UK market completely.

For many, if not most of the UK population, gambling is viewed as a form of entertainment. However, the UK Gambling Commission (UKGC) reports a small percentage (0.7%) of gamblers have a problem, and this, coupled with the heightened negative media attention the industry continues to receive, has led to the UKGC increasing regulatory pressure.

On top of the media scrutiny, reputation management and regulation challenges, the industry is also incredibly crowded. With more than 2,500 licensed operators in the UK alone there has never been more competition for customer loyalty and share of wallet.

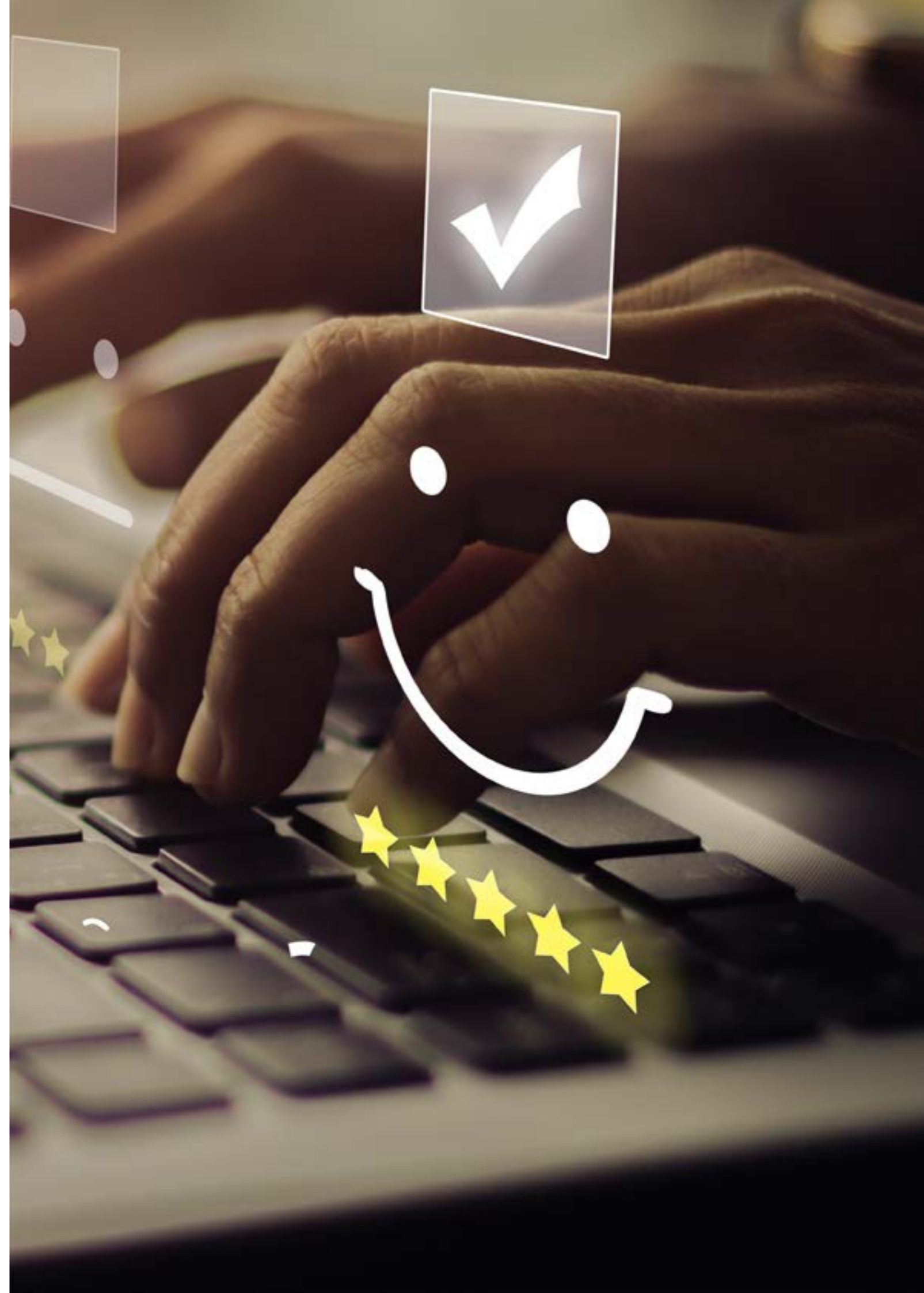
Acquiring new players has become increasingly expensive and difficult, especially with the amount of marketing noise companies need to cut through. This has resulted in operators having no choice but to look for ways to responsibly retain already acquired and lapsed players, and strive to increase loyalty.


And yet, despite all the above doom and gloom, there are opportunities for operators to grasp and make work for both them and for their players.

How can companies tackle these obstacles and increase their loyal customer base?

At 3radical we have worked with many gaming and gambling operators and have seen excellent results increasing retention rates and improving customer loyalty. Our solution is a clear yet proven one (if done correctly) – find innovative ways to create an emotional connection with players.

This isn't as simple as it seems. At 3radical, however, we have found two ways to improve emotional connections and increase player loyalty.





1. Go further than just Know Your Customer (KYC)

KYC is already standard practice for the gambling industry and thanks to this legislation the industry is actually leading the way when it comes to collecting customer data. However, the opportunity remains for companies to go further than just collecting basic, transactional data on their customers for legislation purposes.

The mere fact that data collection is required at the start of the customer journey is a huge advantage. Many industries such as retail and casual dining struggle to know who its customers actually are!

Unfortunately, collecting customer behavioural and preference data has become more difficult with the recent GDPR legislation. Additionally, customers in 2020 are increasingly data savvy and are fully aware of the value their data holds, meaning operators need to motivate customers to provide self-permissioned data with the promise of a two-way value exchange.

The benefit of offering value in exchange for engagement and data is that over time an emotional, trusting relationship will be built with the player, resulting in more data being provided whilst also being GDPR-complaint. Collecting first party data in return for rewards is only part of the solution. Operators then need to use this relevant data effectively.

“The benefit of offering value in exchange for engagement and data is that over time an emotional, trusting relationship will be built with the player”

The more self-reported data collected will help provide companies with a unique view of each customer, and if using engagement software like the 3radical Voco platform, this behaviour and preference data can be viewed and tracked in real time, allowing operators to target the right customer with the right message at the right time.

It works on the 'what's in it for me?' value proposition, the appropriate value exchange can be different for each player, be it cash, progress in a game, free spins, prize draw entries etc.

Foxy Bingo used the 3radical Voco platform to implement a daily retention game onto its website with the goal of encouraging daily repeat visits.

Players were rewarded with one roll of the dice each day, and when the throws for that day had been used, players were then motivated to provide self-reported data in return for additional throws. The real-time data collected allowed Foxy Bingo to optimise each player journey, predict future player patterns and personalise future marketing activity.

Foxy Bingo saw impressive results including a 30% increase in daily active wagering player volumes, more than 60% of customers engaging on five or more days, thousands of completed surveys, and every player that played in month one returned in month two.



2.Create the best (and most fun) user experience

Customers in highly competitive industries like gambling, and especially bingo, are in control of where, when and how they spend their money, particularly across the multiple accounts that we all know each player has already set up.

Unfortunately the amount of choice available to players, and the nature of gambling has made creating an emotional connection with players more difficult than ever, especially with most operators having the same or similar games.

With the work that a player now has to do in order to sign up to a new account and be allowed to play and withdraw, players are likely to a: not bother setting up a new account, thereby meaning they remain playing on their existing sites or stop playing completely, or b: when making the effort to sign up to one more account, as their documents are all to hand, they are tempted by the valuable incentives and bonuses being offered and sign up to several. So how do players decide which site to spend their hard earned cash if they are all essentially very similar and they have limited time, resource and cash?



Collecting sufficient customer data, like in the Foxy Bingo case study mentioned above, would never have been so effective without the brand offering players the best possible user experience. However, to truly stand out when most brands offer very similar games can be very difficult. Therefore operators need to look for more innovative ways to attract customers, optimise the player journey, and create the best possible user experience.

Stride Gaming were looking for ways to drive further growth by introducing new tools that would provide customers with a compelling reason to return to their sites, rather than to their competitors.

Stride, with the help of 3radical Voco, introduced an innovative daily play mechanic across five brands - Kitty Bingo, Magical Vegas, Lucky Pants Bingo, Aspers Online and Spin and Win - designed to offer the best possible user experience and drive engagement by providing players with a chance to unlock daily rewards.

By innovating the user experience, Stride Gaming encouraged engagement with its brands even when players were not actively wagering. This helped demonstrate their commitment to player care by focusing on the fun aspect of a game rather than simply increasing revenue and the amount wagered.



Each brand consequently saw an increase in lapsed customers returning and an increase in player loyalty.

Offering rewards in return for engagement in both the case for Stride and Foxy Bingo allowed the brands to create a loyal base of customers, from which over time they could continue to collect self-reported data, build personal relationships, encourage brand advocacy and increase responsible wagering.

The key to understanding your players and giving them the best possible user experience is to offer a personalised and rewarding two-way value exchange. Operators must consider that their customers are only going to become more tech and data savvy, so they need to find innovative ways to keep ahead of the competition that grab attention, and are entertaining and rewarding.

It is undeniable that having a base of loyal customers makes commercial sense. Brands who get it right will no longer have to enter the 'race to the bottom', and compete with increasing acquisition costs, and will hopefully be able to improve the reputation of both the individual brand and the industry as a whole. Ultimately the long-term goal should be to turn these loyal, retained customers into brand advocates (Nielsen reports 92% of people trust recommendations from friends and family).

At 3radical we have proven (in varying industries including casual dining, financial services and retail) that a great user experience, combined with the intelligent collection and use of self-reported data, will create an emotional connection, leading to an increase in happy, loyal customers and improved retention rates. By building loyalty through differentiation and trust, operators will find the end result is an increase in dedicated brand advocates and revenue. How many operators would say no to that?

Author contribution

The 'Retention & Loyalty' comment in this report was written by Rachel Swann, Commercial Director at 3radical (www.3radical.com)

3radical

Industry Predictions

We asked some of the most prominent figures in the UK online bingo industry for their comments and predictions for 2020.





Simon Collins,

Managing Director - Betting & Gaming News UK

“AI proliferation is already a reality and will continue to have a major impact in 2020”

AI proliferation is already a reality and will continue to have a major impact in 2020. VAIX.ai has won awards and delivered excellent results. Using the output of our rationalisation, player value and activity models as a basis, we started merging them to one combined player view.

Combining the pieces of the puzzle has allowed us to 1) accurately predict player lifetime & future value to provide the best possible offer, 2) know a player's preferred content to give them the best possible bet/game without searching, and 3) identify (problematic) playing patterns, to adjust or filter out a player's offering, ahead of time before damage is done. In our opinion AI is the most important enabler for creating a value-generating, player-friendly and sustainable industry.

Another major change in 2020 will be the addition of at least two new bingo software platforms. I know who they are, and you will find out during this year! Interest in the sector has jumped due to the regulatory headwinds of 2019. Stake limits and the like are driving renewed interest in bingo as it is a low stake casual gaming format which has a reasonable level of social acceptance.

Mobile offerings will improve bingo mobile penetration in 2020. The current statistics for mobile usage on a slots based proposition are 80% mobile, 15% desktop, 5% tablet.

Bingo has always lagged these stats, largely because the rendering and usability on mobile has been woeful. In 2019, however, Dragonfish, launched a new offering using an updated technical solution nicknamed "Snow White". As this new framework is adopted and deployed mobile bingo usage will start to catch up with other verticals.

In terms of platform for a leading UK casino, users are seeing 54% Android, 28% iPhone 13% Windows, rest iPad / other. So I believe Android should be a leading focus for everyone in 2020 especially in bingo which is typically more likely to be Android based.

Could 2020 see a proliferation of innovative payment systems like Trustly imported from the Nordics? We should start to see new payment offerings coming to the UK in 2020 hopefully this will mean new innovation for bingo customers.



Kevin McGinnigle

Managing Director - Positively Distinctive Media

“The wise will adopt a low stake, high entertainment model designed to keep players engaged for longer without letting them lose what they can’t afford.”

2019 continued the trend of challenges that brand owners and operators have faced in recent years.

We've had to acclimatize to paying tax on bonuses, followed by an increase in tax and the introduction of stringent KYC checks at various stages of the player's lifecycle, leading to lower conversion rates.

To top it all off, we're now exposed to the significant wins available to players who can withdraw their winnings in an instant, never to be seen again. Margins are at an all-time low with risk at an all-time high. Not a great combination!

2020 will be no different with more challenges that continue to have a knock-on effect across the industry, from affiliates to chat hosts and everybody in between. We'll see more brands and operators leaving the UK and/or turning their attention to the international opportunities available.

I'm sad to say we'll even see some companies going bust (fingers crossed not us!). The ratio of new slots/casino sites launching will fall in favour of new bingo sites, this time coming to market with an established brand, traffic source or genuine attempt at innovation. Gone are the days of justanotherbingosite.com/no-differentiator.

We'll also see businesses looking for innovative ways to reduce their tax liabilities, game royalties and exposure to the potential of significant wins, whilst working hard to keep their customers engaged.

The wise will adopt a low stake, high entertainment model designed to keep players engaged for longer without letting them lose what they can't afford.

Take a look at what Buzz Bingo are doing, they're going in the right direction and it's not a bad thing for the industry. Don't be surprised to see a new style of slot games come into play too, with smaller jackpots and penny stakes.

Finally, we'll see the launch of our brand new and innovative bingo gameshow that blurs the lines of TV, entertainment, gameshow and gambling. Hopefully, that's all people will be talking about come 2021!



Rhys Owen

Managing Director - Mutuel Play

“Bingo will remain fairly stagnant, with slots and live products providing the main incremental growth opportunities.”

In 2020 I expect there to be a continued focus towards the casino/arcade side of bingo operators' businesses from a product and marketing perspective.

Bingo will remain fairly stagnant, with slots and live products providing the main incremental growth opportunities. It may be a wise decision for operators to exhaust value in these areas before any form of stake and prize caps are introduced into the UK market on slot/casino games.

On the other hand, operators may choose to innovate in the bingo space as bingo as a product is unlikely to be hit with any maximum stake or prize caps, as is the case in the UK retail environment. Tribal Casinos in the US found loopholes in the regulation there with Class II gaming machines, I suspect operators and suppliers may look to exploit bingo's RNG format to ensure they can retain a high stakes, high prize format for players.

I would predict that 2020 will see some product developments in live bingo, and hopefully some sharing of liquidity between retail and online with Buzz Bingo and Mecca Bingo looking to extract value from their substantial retail pools.

From a suppliers perspective, they will be wary of the successes that games like Slingo from Gaming Realms have had in recent times, highlighting a convergence between bingo and slots.

This shows that there is a real appetite for this genre of game, especially on the mobile format due to the speed of game play. This will be an area of focus for the purer bingo software developers as well as bingo soft slot specialists.

I do not believe we will see many new sites launching, perhaps only those wishing to recycle lapsed players across a different brand.

Suppliers will be looking at new markets, mainly South America to grow revenues due to the limited growth opportunities specifically in bingo in the more mature markets.

At some point I see bingo flourishing in the US, although I would imagine this may only come once Charitable or Lottery organisations are ready to go digital and the licensing framework allows, perhaps not in 2020 but certainly beyond.



Kris Kukula

Director - Jumpman Gaming

“2020 will be the year of opportunity for those who are able to both remain compliant and evolve their product in a way which makes it more engaging, intuitive and unique, compared to those who play it safe by sitting still.”

TLDR: More regulation, but not all doom and gloom.

In 2020 we will continue to see an evolution of the regulatory framework with a particular focus on affordability, which will result in an even bigger shift of focus from VIPs to providing a more casual gaming experience for the masses.

The silver lining is that the industry can use these changes to improve its public reputation and broaden the appeal of the product, which will mean more opportunities for acquiring new types of customers.

On the latter point, 2020 will be the year of opportunity for those who are able to both remain compliant and evolve their product in a way which makes it more engaging, intuitive and unique, compared to those who play it safe by sitting still.

2020 should also see the rollout of 5G, which will mean that mobile games continue becoming ever more immersive and providing a better user experience. The other key technological advancements will be around ML/AI, which will play a greater role in understanding and responding to players' individual needs in real-time.

Last but not least, 2020 will be a key year for cryptocurrency, which is on the verge of becoming regulated and therefore broadening its appeal for both consumers and operators. Should this happen, we can expect it to become a hot topic for gaming regulation, which will most likely result in knee-jerk reactions that will prevent crypto from becoming a permanent way of depositing



Savvas Fellas

Managing Director - MrQ.com / Lindar Media

“VIP schemes are currently under the spotlight. It would hardly be surprising if the response was to no longer be able to incentivise bigger players with lucrative gifts, offers, cash drops and everything in between. .”

VIP schemes are currently under the spotlight. It would hardly be surprising if the response was to no longer be able to incentivise bigger players with lucrative gifts, offers, cash drops and everything in between. No one knows how this would look in practice but it is possible. If a universal benchmark was set it would be better for the smaller operators as it will create a more level playing field

With the FOBTs being reduced from £100 to £2 but players still able to wager just as high online, there seems to be an imbalance between these two worlds. Online will have to make some effort to follow, despite having the different position in knowing much more about a customer before they engage in a business relationship with them. Some sort of cap will be introduced but perhaps not to the levels of the retail side.

Most casinos are wrappers of others 3rd party content. Nothing differentiates them apart from offers, promotions and some other frilly bits on the perimeter, many operators are very creative with how they manage this – Casumo.com and PlayOJO.com are two great examples. But bingo serves as nice sticky content. It can broaden a sites audience quite substantially and the creative angles are quite surprising when

you scratch beneath the surface, it can also differentiate you, especially if you have your own bingo content.

The whole is greater than the sum of it's parts: we've already seen this in practice with Rank/Stride and others. There will be more to follow in order to weather any potential storms ahead of us, makes complete business sense and it's more than likely to be a buyers market.

If the demand for UK business decreases or if the regulatory pressures maintain momentum, it could help reduce the cost of acquiring new customers. Perhaps if a combination of the above predictions are bought to life then a lower player acquisition cost will more than likely be a bi-product of these changes. For the smaller guys it again creates a more level playing field.



Contacts

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About this report

The research and comment featured in this report is based on qualitative, quantitative and semi-structured industry comment conducted in December 2019 unless otherwise stated within. To download additional copies of this report please visit: www.whichbingo.co.uk/reports/

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