

The background of the entire page is a vibrant, abstract illustration. It features large, flowing shapes in shades of green, blue, yellow, and red. Scattered throughout are stylized figures of people in various celebratory poses: a woman in a red top and dark pants jumping on the left, a man in a purple shirt and dark pants jumping with arms raised in the top right, a woman in a green top and red skirt jumping on the bottom left, a person in a yellow shirt and purple pants jumping in the bottom center, and a person in a blue and white striped shirt and dark pants performing a handstand on the bottom right. There are also stylized raindrops in blue and yellow, and small circles of various colors (orange, blue, red) scattered around the text.

Online Bingo Annual Report 2021

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Introduction

I am excited to welcome you to the sixth edition of the WhichBingo Annual Report. 2020 saw the entire bingo industry undergo a dramatic acceleration in the digital transformation of the last several years. In this year's annual report, we explore the many changes of 2020, highlight its success stories, provide industry insights, consumer survey results, updates to important regulations and expert forecasts for 2021.

COVID-19 brought about many challenges for operators. The complete shift to online as bingo halls closed during multiple lockdowns was a defining point for our industry, prompting brands to adopt or rapidly enhance their online bingo experience. In 2021, we will see further investment in this area with the latest tech being used to bring the most enjoyable aspects of the bingo hall online and - in particular - nurturing the sense of online community that promotes inherent brand loyalty. To achieve this, a greater emphasis will be placed in fostering inter-player activity and on engaging online bingo platforms to optimise user experience. During the uncertain economic times that lie ahead, brands need stability and sustainable profitability. At WhichBingo, we believe this

comes from embracing regulations, ensuring player safety and achieving the right mix of technology and high-quality content to create best-in-class experiences.

Our successes at WhichBingo in the past year have come straight from our consumers and partners. WhichBingo's users benefited from relevant content helping them to make informed choices. Our site proved extremely valuable to operators, assisting them to maintain a high profile during a time that saw heightened competition to attract new and old players alike. As industry innovation continues at pace, we're confident that we are well placed to continue meeting our customers' evolving needs.



Stuart Simms
Group CEO
XLMedia PLC

WhichBingo 2021 Player Survey



Our biggest ever survey has provided some very interesting data that may change the way bingo operators view their players.

Over 800 UK online bingo players aged 18+ took part in the WhichBingo survey conducted in January 2021 and this gives us the best ever picture of the current market - who's playing, what they want and what they like and dislike. This information is vital to the bingo industry more than ever as the previously accepted norms are changing rapidly. Operators must keep up to ensure they mould their sites and advertising in the correct way to ensure the continued growth of their brands.

Demographics

Our survey suggests there has been a surge in the number of men playing online bingo, with the percentage of male respondents increasing from 21% in 2020 to 48% in 2021.

Online bingo's appeal seems to be reaching a younger audience too, with 25 to 54 now the most represented age range, whereas in 2020 it was 35-64.



The percentage of male respondents increasing from 21% in 2020 to 48% in 2021.

Why online bingo?

The emphasis at most online bingo sites is on enjoyment over winnings, and this is borne out in players' reasons for getting involved.

Only 33% of survey respondents who play online bingo selected 'to make money' as a reason for playing, while 83% picked 'for entertainment/fun

and a variety of all the other responses, meaning that finally the message is getting across that gambling is not "all about the money".

33%

A large green '33%' is displayed. To the right of the numbers is a small icon representing money, consisting of a stack of gold coins and a single gold coin with a dollar sign.

83%

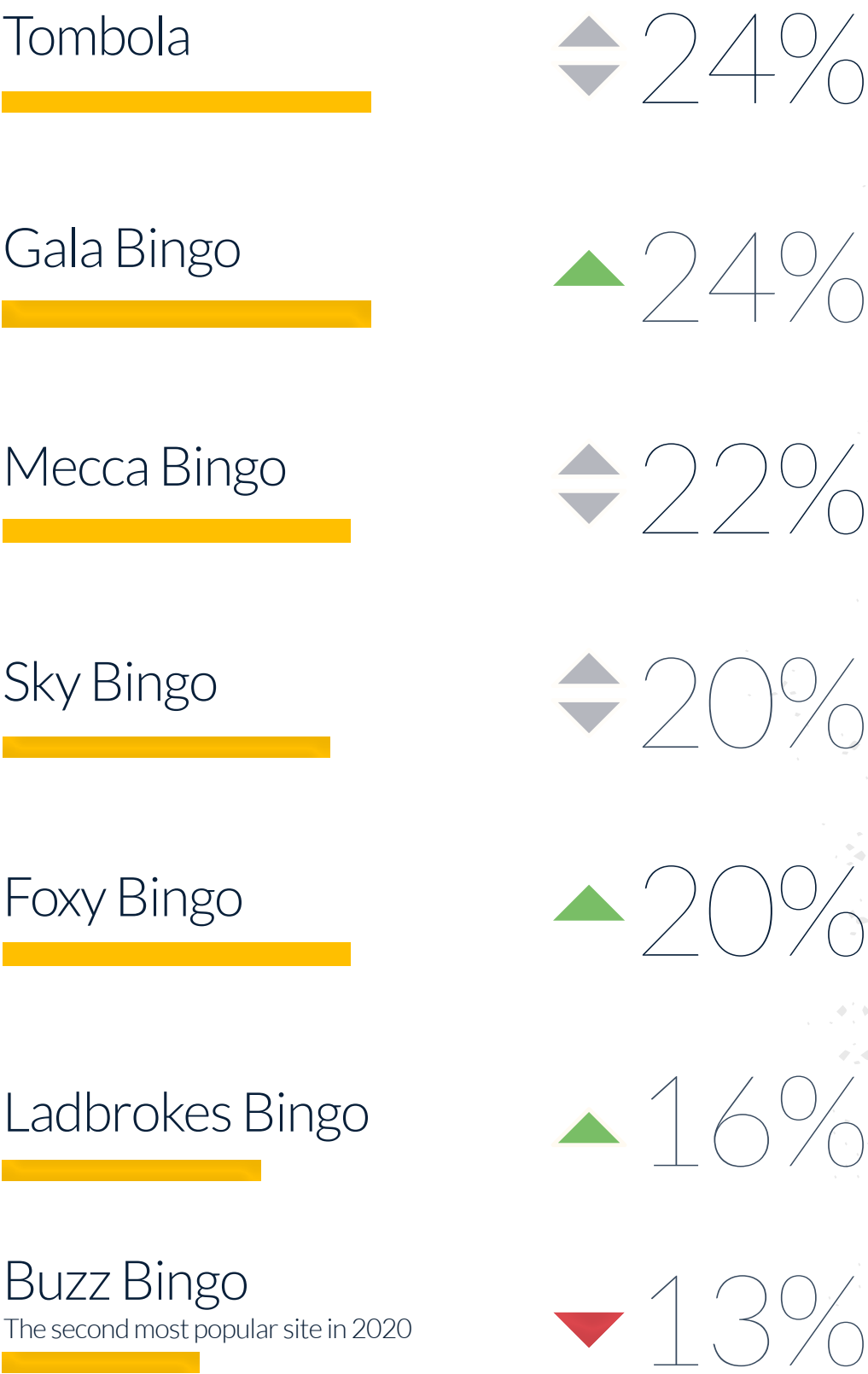
A large dark blue '83%' is displayed. The numbers are surrounded by a festive explosion of colorful confetti and streamers in shades of pink, yellow, blue, and green.

Only 33% of survey respondents who play online bingo selected 'to make money' as a reason for playing, while 83% picked 'for entertainment/fun' or 'for excitement'.

Most popular bingo brands

Gala Bingo has joined Tombola at the top of the charts, with both sites popular among 24% of our survey respondents. Mecca Bingo (22%) and Sky Bingo (20%) have retained their high audience share from 2020, while Buzz Bingo (13%) has slipped in popularity since being named the second most popular site in 2020, Foxy Bingo (20%) and Ladbrokes Bingo (16%) have both enjoyed a resurgence.

Ease of use was picked as the most valued aspect of players' favourite sites, with 46% of respondents agreeing on that, while ease of withdrawal, game experience and promotions were selected as the next highest priorities among respondents.



Onboarding New Players

The online bingo industry's obsession with promotions as a way to attract new players suffered another blow in our survey, with welcome bonuses coming behind easy-to-use sites and ease of withdrawal in the top factors affecting respondents' choice of bingo site.

42% of players rate a site being easy to use and navigate as an attractive feature, while being able to get at winnings easily when they come to withdraw was an important factor for 34%. Bonuses (31%) and promotions (29%) came in third and fourth, respectively, ahead of game experience (26%), easy registration (26%) and design (20%).



Community

Facebook is the most likely place to find online bingo players gathering on social media, with 40% of survey respondents saying that is where they would like the online bingo community to exist. Website forums (27%) remain more popular than channels like Twitter (21%), Twitch (16%) and Discord (14%), showing that the most up-to-date platforms are not necessarily the places bingo players want to gather.

Despite just 16% of respondents choosing friendly chat hosts as an important factor when choosing a bingo site, community remains a high priority: 53% of players said being part of a community is important or very important to them, while just 11% said it is not important at all.



Spending habits

Spending at online bingo sites exceeds £101 per month for just 4% of our survey respondents, with the majority of players (68%) spending between £11 and £50 per month.

Average deposits tend to top out at £30, with just 19% of respondents saying they spend more than that, while 4% of players admitted they never deposit – presumably free bingo hunters on the loose!

PayPal is the most popular payment method among online bingo players in the WhichBingo survey, with 40% choosing the online money transfer service, while 33% of players said debit card is their preferred method.



PayPal is the most popular payment method among online bingo players in the WhichBingo survey

Withdrawals

We asked survey respondents about the level of winnings at which they would make a withdrawal, and the largest proportion (23%) said £41 to £60, which may in part be due to some sites only allowing withdrawals above a certain amount. This would also indicate that the £50 mark remains a key figure in players minds as indicated in our previous surveys.

Safe play options

Deposit limits are the preferred safe play option among WhichBingo survey respondents, 25% of whom said they use them. In-game spending limits are the next most popular option, with 19% of players applying them, while stake limits and cooling-off periods are used by 14% of respondents.

Bingo variants

WhichBingo survey respondents enjoy all of the bingo variants but traditional 90-ball bingo comes out on top with 39% of players preferring it. The top reason given for choosing a particular bingo

variant is "easy to understand", underlining the importance of making online bingo accessible and playable by all.

Online bingo: An increasingly shared space

The view of online bingo as a game played by a largely female demographic could be set to change given an apparent rise in the number of men taking part, according to the WhichBingo survey.

The results of our annual survey suggest there has been a surge in the number of men playing online bingo, with the percentage of male respondents increasing from 21% in 2020 to 48% in 2021.

It could be that couples spending an increased amount of time together due to the coronavirus lockdown measures led to a rise in the number of men taking up bingo, given that 45% of the players surveyed said they are married and 22% said they are in a relationship. making online bingo accessible and playable by all.

New audiences

But with 27% of respondents selecting 'single' as their marital status, the increase in male online bingo players might not be due to the company they keep.

There is a long tradition of online bingo being marketed to a female audience, with sites like 888Ladies focusing on women, and celebrities like Mel B, Barbara Windsor and Heather Graham fronting up television advertising campaigns over the years.

But as online bingo's popularity grows, it is bound to reach new audiences and that certainly seems to be the case – not only with men, but also with a younger demographic.

Online bingo's appeal seems to be reaching people earlier in life, with 25 to 54 now the most represented age range (83% of respondents) instead of 35 to 64 as it was in 2020. There has been a rise in 18 to 24-year-olds logging on, with 10% of respondents falling into that age bracket in 2020, compared to just 1% in 2020.

Online bingo's appeal seems to be reaching people earlier in life with 25 to 54 now the most represented age range



Broad appeal

At the other end of the age spectrum, players aged 65 and over represented just 1% of the survey respondents in 2021, down from 4% in 2020, and 55 to 64-year-olds made up 6%, down from 27% in 2020.

Our survey also found that, while bingo is a wonderfully simple game that requires very little learning, its players have plenty of smarts.

The most common response to the question regarding level of education among online bingo players in the 2021 survey was Bachelor degree or equivalent, with 27% of players having been through university, and a further 16% said they had a Masters degree.

With so many men, young people and graduates playing the game, it could be time for a new approach from those involved in marketing online bingo to the masses.



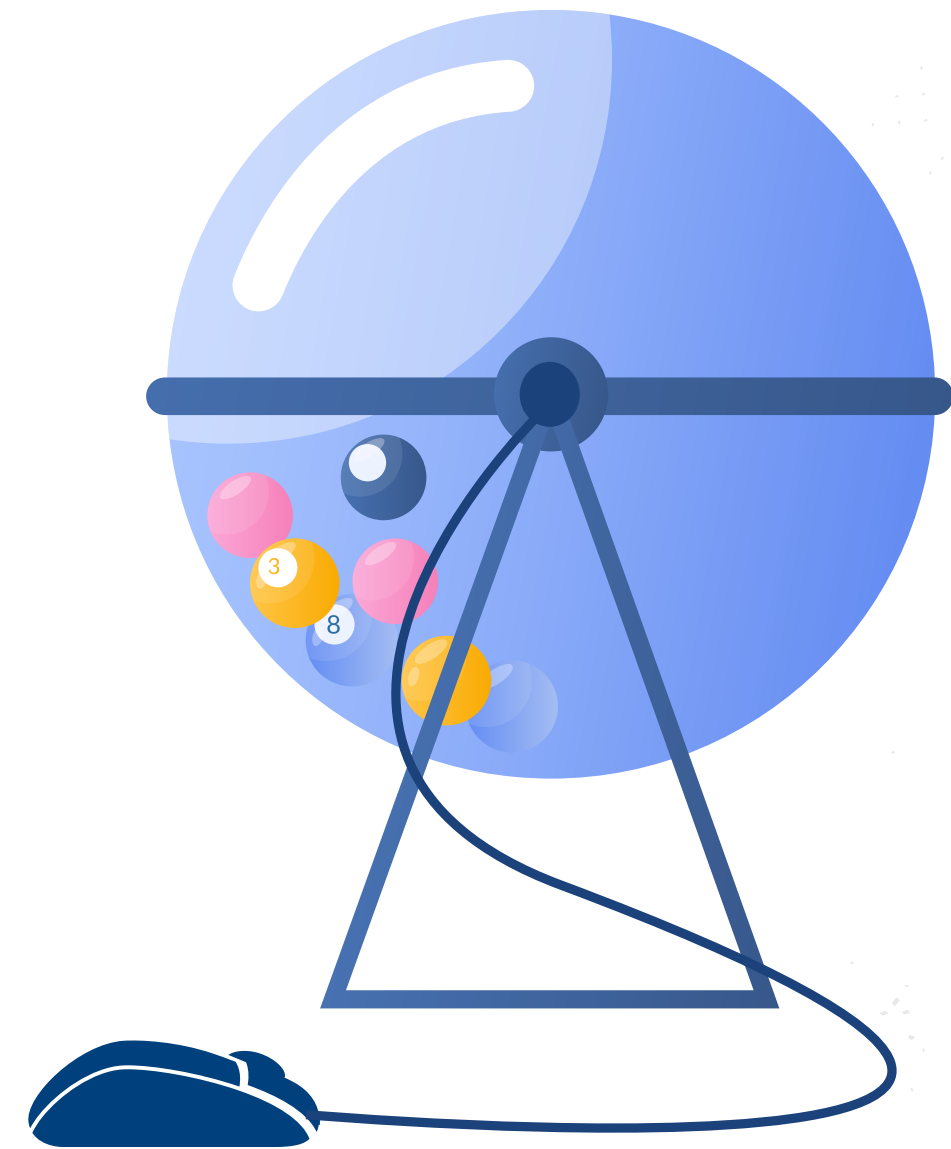
Capturing bingo hall atmosphere remains the challenge

Online bingo sites may have succeeded in earning the loyalty of vast swathes of players who also play offline, but over a quarter of those players still yearn for the atmosphere of land-based halls, according to the WhichBingo survey.

Player numbers at bingo halls have been in decline since the 2007 smoking ban came into force in the UK, and the rise in popularity of online bingo has seen many players swap their weekly night out for time spent online.

But the 2021 WhichBingo survey found that, among bingo players who play the online and offline iterations of the game, 28% said they prefer to play in a land-based hall.

This should not unduly worry online bingo operators, given that 45% of the same group of respondents said they prefer to play online, but the allure of land-based halls remains strong and recreating it online is a challenge that may never be entirely fulfilled.



But the 2021 WhichBingo survey found that, among bingo players who play the online and offline iterations of the game, 28% said they prefer to play in a land-based hall.

Social benefits

The social aspect of land-based bingo halls is perhaps the most difficult element to recreate, with lifelong friendships having been forged at halls across the UK for many decades. Among respondents in the survey who play online and offline bingo, 41% chose "the atmosphere" when asked what they like most about bingo halls.

"A night out" was second, chosen by 40% of respondents, and "meet other people" and "shared excitement" came in joint third with 36% of respondents selecting them.

Chat rooms run by helpful moderators who run side games and promotions have long been the online bingo world's response to the challenge of creating a bingo-friendly atmosphere on the web, but the WhichBingo survey found that friendly chat hosts were a priority for just 16% of players when looking for a place to play.

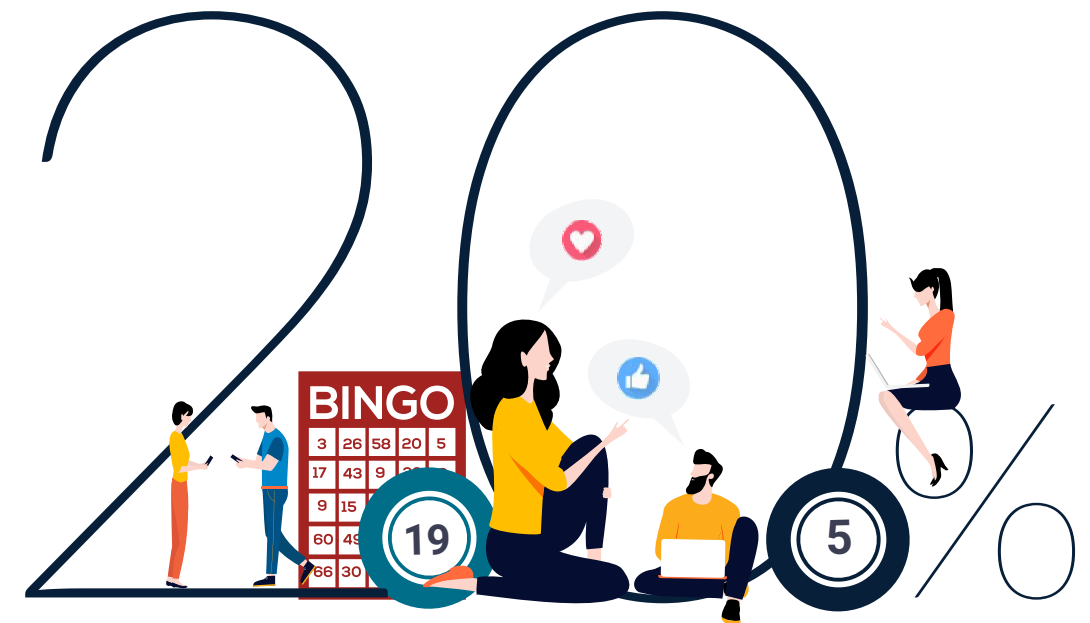
Among respondents in the survey who play online and offline bingo, 41% chose "the atmosphere" when asked what they like most about bingo halls.

atmosphere

Community vibes

Being part of an online bingo community is considered "very important" by 20% of players, according to the survey, but 17% also named having "no one to talk to" among their main obstacles to playing online.

Online bingo operators cannot ignore the lasting hold that land-based halls have on players, with 51% of those who play online still attending halls according to our survey. With the coronavirus pandemic having curtailed land-based bingo for an indefinite period, there may well be a resurgence in its popularity still to come when restrictions are eventually lifted.



Pragmatic Play Bingo - From Zero to Industry Hero in 18 months

Challenging the old guard
bingo software – and winning!



Claire McDaid
VP of Bingo, Pragmatic Play



Dedication

Too often, product roadmaps are created in boardrooms by those without any personal interaction with players. For example, when did these people last enter a bingo club (albeit, that was a little trickier to do in 2020)? Like my B2C days, my goal is to interact with bingo players and get their feedback to gain a deeper understanding of their wants and needs, and their likes and dislikes. This is a vital element in improving our products and ensuring they are market-leading. This is also why I immensely value feedback from our partners, as they have the close connection to the players and can offer another layer of insight, which is another step away when working in B2B or held in more structured environments such as focus groups.

I do genuinely miss meeting the players at social events like the renowned ones my previous team used to organise at Foxy. It was the optimum way to hear their thoughts and opinions, no holds barred! It was a chance to gain an understanding as to what makes them tick. Luckily, we do have a partner with one foot still firmly planted in retail (Palatial), and when normality resumes, the team and I will be making regular visits to Patrick Duffy's Palaces bingo hall once again.

That said, despite the wealth of player data that operators can have, there is often little opportunity for them to offer input into a supplier's product roadmap unless they are one of the big dominant brands. This is something we at Pragmatic Play are changing by keeping a flexible roadmap and communication channels open with all our partners – big or small.

My team

“You are only as good as your team,” and I wholeheartedly believe I have the strongest bingo team in the business. I am humbled that many people in my team have worked with me previously, and when I told them what I wanted to achieve at Pragmatic, they gave a firm ‘yes’ to join me. We have decades of dedicated bingo experience amongst us across both land-based and digital. I could only have achieved what we have in these past two years with these people behind me. They have the same passion, dedication, and commitment to make Pragmatic Play a market-leading bingo supplier, just as I do.

Strategy

Our strategy at Pragmatic Play was simple. We wanted to offer a fully customisable, innovative product that would be both market-leading and easily accessible, with a partner-supplier relationship that was a two-way street.

The aim was to create a bingo offering that attracted new operators to the vertical, whilst also looking to entice existing bingo operators, who are frustrated with imbalanced partnerships – or who like I, experienced frustration with the lack of development resources available for innovation.

We have also made it easier for operators to access bingo through our single API integration, which means there is no longer a monopoly on commercials or platform commitment. It is one simple API for the full Pragmatic Play suite of products. The view was to treat the integration process more like a slot or table game.



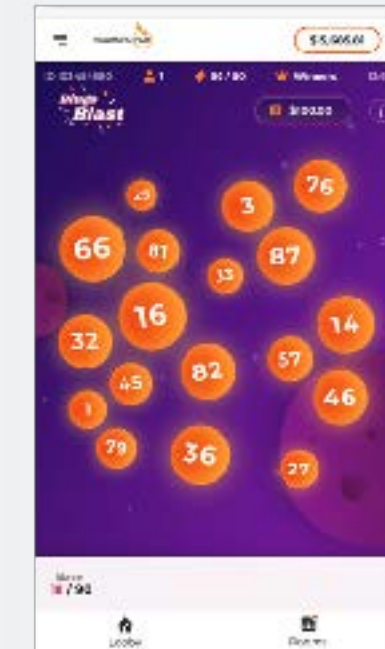
Innovating a classic

With most users playing on-the-go and seeking swift gaming sessions, there has been a gap in the market to create a truly mobile-first bingo offering. The question that faced us and many other providers was how to best achieve this.

This is where the idea for our cutting-edge product, Bingo Blast, was born. Bingo can be slow to start, taking a minute or so before players even know if they are close to winning. Bingo Blast enhances the engagement without sacrificing the love of a classic 90-ball game, whilst also being uniquely designed for on-the-go mobile play.

Through a series of blasts, the game quickly takes the players to a 3-to-go or even 2-to-go state as two blasts of balls swiftly explode onto the player's screen.

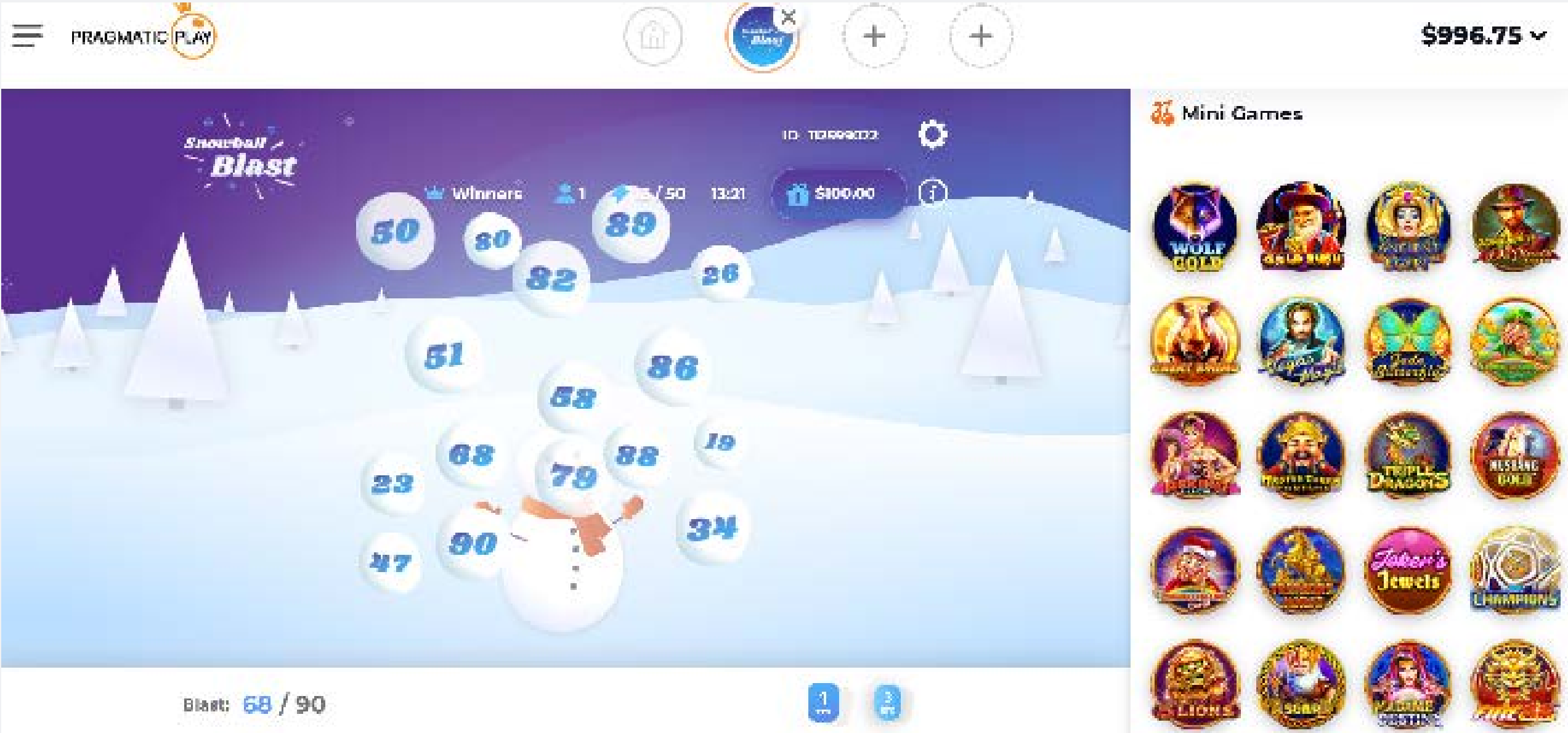
This means players can enjoy the increased excitement of being closer to a win and waiting for that full house ball to drop, without the slow accumulation of balls that usually transpires at the start of a game.



Screens from the Bingo Blast game

What sets this game apart is the design. In the past, I felt bingo wasn't ever really given the sleek designs that we see on other products, but we'd be naive to think that bingo players haven't become accustomed to sophisticated UI and UX.

Since launching in Q2 2020, Bingo Blast has been a considerable hit with both players and operators alike, seeing double-digit growth month on month. We have already attained industry awards for our bingo products and continue to gain traction with Bingo Blast fuelling interest in our portfolio.



Creating a personalised approach



By giving operators an almost blank canvas, they can decide how they want their bingo product to look and feel, which is something we believe very strongly in. Brand consistency is key to standing out and being successful in any space.

Our bingo product has been created with a modular approach, meaning operators can take or leave certain elements of the product. Mix and match options include anything from visual enhancers such as headers and footers, to the customisation of the UX through a choice of position for chat or slot games, and flexibility around lobby features.

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Personalisation is a higher priority for some operators than others but having the option means all our customers are happy. Major partners, such as Skill-On-Net, have their own personalised Pragmatic Play bingo rooms for their Play OJO brand, while others enjoy a standardised version.

The 'off-the-shelf' bingo product we offer means that smaller operators or those restricted by lack of resource can still have one of the most modern and engaging bingo lobbies on the market. By giving operators as much choice and flexibility as they desire, they have control over what layout and style best suits their brand and audience. PlayOJO and LeoVegas, for example, have really brought their core creative ideas into the bingo arena, and it has been a pleasure working with them and seeing their branding come to life in the vertical.

We truly believe that creating personalised, innovative products has breathed a new lease of life into many of our partners' bingo offerings. We have a market-leading number of variants to include 90, 80, and 75 ball options, as well as shorter, sharper 50 and 30 ball. Then we have a full suite of marketing features such as Roll-On, XTG, Buy X Get Y Free, Session Bingo, Multi-Stake, and Fair n' Square, as well as engaging jackpot highlights like 'Every Ticket Wins' or 'Must Go,' tiered progressive options, and a seamless user journey for any JP's with physical prizes.

Operators that have previously shunned bingo now have an opportunity to see how it can grow both their database and their brand in the sphere. In the past, it was in some cases just too difficult – from both a commercial and development point of view – to consider a bingo offering, especially with both casino and sportsbook viewed as cash cows.

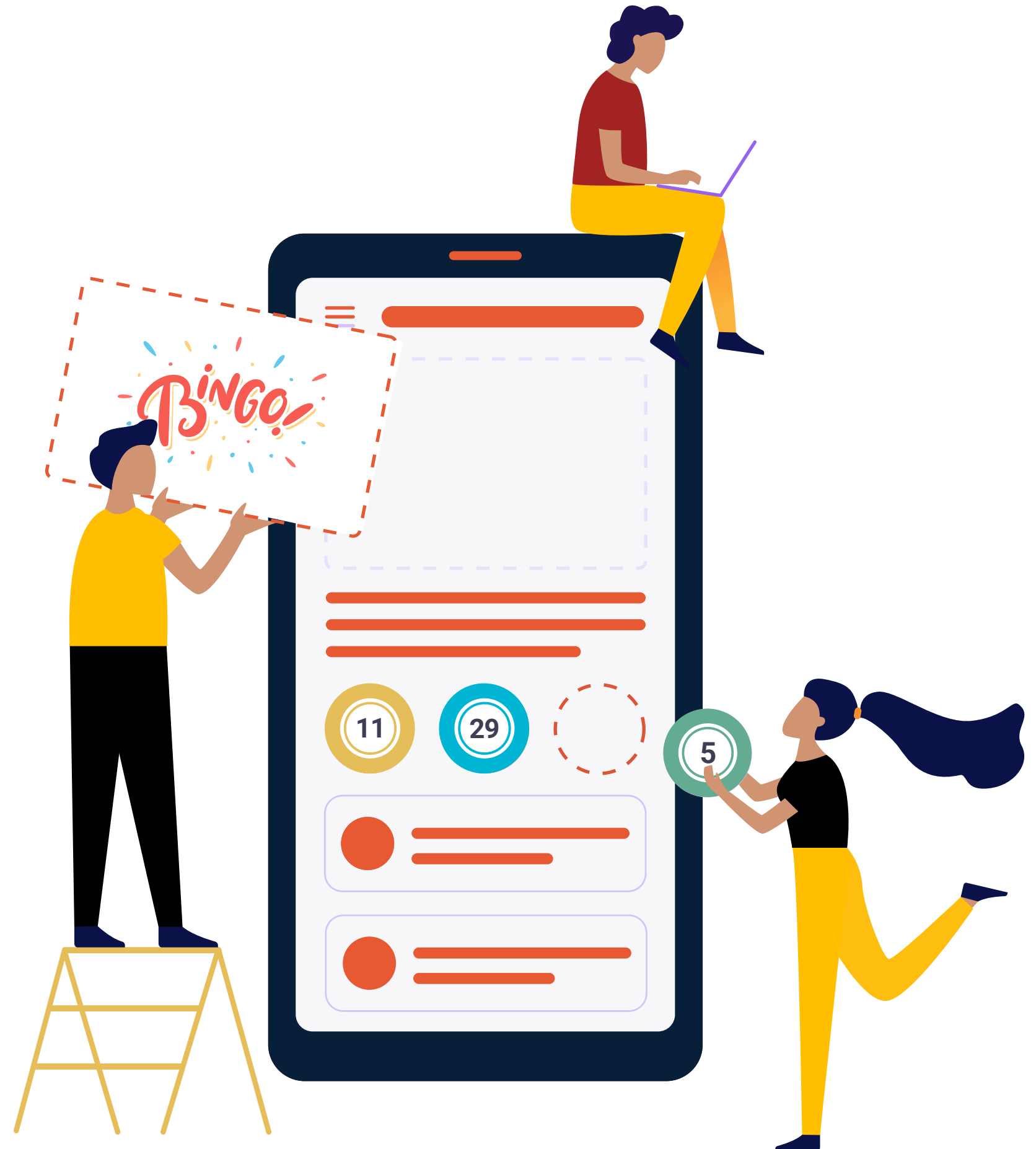
We have both the flexibility that operators require and a highly competitive bingo product.

For operators, it's a win-win situation, as they not only have access to a wide range of award-winning casino content, but they have a plug-and-play bingo solution that is simple to take live with the operational support of one of the most experienced bingo teams in the industry.



Having multi-product players is a huge plus for operators, and the additional features offered in our bingo products allow for casinos to cross-sell it to their players, promoting something completely new.

We took the view that bingo should be treated like a slot game and could be made easily integrable. Through our single API offering, operators now can access every vertical in our multi-product portfolio, including bingo.



The road ahead

Since the launch of our bingo product, we have gone from strength to strength, culminating in a recent victory at the WhichBingo awards for Best Bingo Software. It is a real statement as we look to progress forward, with exciting additions to not just our bingo variants, but also our wider bingo network.

Some suppliers have a fascination to create the next big thing. While these ambitions should be celebrated, sometimes the more subtle goals can achieve equal success. We have found the sweet spot in taking an instantly recognisable product and adding a unique twist to bring it into the modern era.

It continues to be full steam ahead in 2021. 2019 was focused on building our product, while 2020 was about building the network. The upcoming year will be about continuing to focus on both those areas, while picking up some more awards will be something deep in our sights!



“It is not about reinventing the wheel to stand out, but trying to create a better version of what currently exists in the market.”



Get Ready for a Brand New Concept of Online Bingo



Kevin McGinnigle
Founder and Director,
Positively Distinctive Media

I'm on a mission to create a new generation of online entertainment. I'm convinced we can combine the excitement of game shows with the joy of bingo



A New Generation of Online Entertainment

My name is Kevin McGinnigle, and I'm on a mission to create a new generation of online entertainment. I'm convinced we can combine the excitement of game shows with the joy of bingo. This year, the team at Positively Distinctive Media are going to put that theory to the test!

Back in 2009, I was given the opportunity to work as a bingo chat host for a new online brand on the Virtue Fusion/Playtech platform. I came from a family of retail bingo players, so there was always an interest in the sector. I soon figured out that online was a whole new world.

As chat hosts do, I formed many close relationships with players. I can still remember chat names to this day and some of the stories I was told; it really was a fun time. There were also very emotional moments: I can still remember the day the daughter of one of our regular players logged into the chat room to tell us her mum had passed. I cried. That is the power of bingo when done correctly.

I wouldn't be writing this today had I not got that job. That one bingo brand turned into a multi-brand, multi-operator iGaming

business with over 140 brands in seven years before the business was ultimately acquired.

I'd played my part in growing a business from three people in a kitchen to a 40+ staff operation. By the time we were acquired, there wasn't anything I hadn't done. It was this experience combined with a team that I trusted, which is what led me to set up Positively Distinctive Media.

Our team is fuelled by a passion for innovation in the world of online entertainment. We know the UK needs something different, and that's what we're going to deliver.

A new business. A new idea. A gap in the market?

Deal or No Deal was a hugely successful game show that converted incredibly well into the iGaming and bingo space. Who Wants to be a Millionaire didn't do too bad either, right? Evolution proved there is a huge market for live games with presenters and real-time betting events (sorry, I can't call it a true game show!). HQ Trivia has shown us there is an appetite for social community games that pit us against each other to win prizes.

So, knowing this, what if we created something and fused it with the social, community-driven nature of bingo? What if we could drive the UK gambling market in the same direction? Small stakes gaming with a strong focus on player protection, affordability, and ultimately what gambling was originally all about – entertainment?

That is where we feel there is a huge gap in the UK market and is why we believe our game will be a huge hit with both players and operators alike. It's a heck of a challenge, but we're sure as hell going to give it our best shot to find out!

Combining luck, decisions and drama for a truly entertaining experience

Over the last 16 months, we've been working hard to create a proprietary bingo engine that will give us the flexibility to get crazy. That flexibility is what will allow us to release our first, flagship game, which for this article we'll refer to as Project Relentless (PR).

The format is relatively simple. It's based around bingo, which acts as our core engine. This allows us to implement various connotations throughout the show. I refer to it as a show because it's exactly what I feel it is – bingo combined with a game show format.

Here's an overview of the PR format, without giving too much away...

1. Preliminary Question(s)

To begin, all players who are part of the show may be asked a question or two. Their answers could be used throughout, so it's important they answer wisely.

2. Qualification – The Audience

From here, we move into our Qualification round as one unified audience, and we play straight up one-line, two-line, and full house bingo. We may experience events during the qualification round. We may not. It's all down to the luck of the balls; that goes for qualifying, too.

Yep! As with all the best game shows, there's a Qualification round. Those lucky enough to qualify will head on through to the Selection round. Selection is simple and random, and once it's over we have our Contestants.

3. Final Round – The Contestants

This is where it gets interesting... but sorry, that's all you're getting for now! I'd HATE to spoil the ending, so you'll have to come and play the game for yourself when it's ready. To sum up, we've got decision making, drama, spot prizes and conundrums.

But what sort of game show doesn't have its own live host to bring you on that journey?

To bring out the joy, the passion and excitement of what is going on at that very moment?

The power of the live host

Yes, we're going to have a live host. Perhaps not for every show. Perhaps we'll have different hosts for different events. Maybe some will be famous? Maybe others will be the shining star that becomes famous because of Project Relentless?

I quite like not knowing who it will be, whether it will be one person or if we'll have an eclectic pool of hosts that we could work with for various occasions.

One thing I do know is that we need the host of the show to be passionate, energetic, and funny. They need to really buy into the experience that we're trying to create on each show.

Having been a chat host, I know how powerful that was even with just text on a screen. We had a lot of players coming back to our brand because of the environment we created in the chat room.

Whatever decision we make with our host, I'm definitely having a go first!

The trademark is in place. The branding is set. The theme tune is...what? There's a theme tune?



Kevin McGinnigle
Founder and Director, Positively Distinctive Media

We've been super protective about the concept and branding for a couple of reasons. The first being the industry is small and it doesn't take much for someone to get wind of a concept. We're effectively a start-up taking a huge gamble on innovation, and what we've done is unique. For someone else to take it from under our nose and move faster than us to market would have been extremely disheartening.

Second, **we set out from the start to create an experience that captures the thrill of a game show in the bingo world. It's not just another game. We're trying to create a brand.**

The look, feel and sounds within the entire experience have been designed to make you feel like you're part of a game show. As with any game show, it has even got its own theme tune!

Third, we are marketeers. We have plans in place to get our brand out into the world far and wide, slightly different to how others would do it. It may work, it may not. But if you don't try, you'll never know.

The future is unknown, but we're confident about our vision

Project Relentless is just the start of what we're going to achieve. Our focus is not to release 10 games a year and re-badge the same math model with another lick of paint. We want to create forms of entertainment that blur the lines between gambling, game show, and entertainment.

Sure, we have plans to release more content in future. Anyone who knows me knows that I have about 10 ideas a minute. However, our immediate focus is on making Project Relentless a success.

In summary

With even more regulatory changes ahead for the UK market, our timing couldn't have been better. This idea has been sitting in my head for far too long; for us to be so close to bringing it into reality is super exciting.

Operators will be looking for ways to attract, engage, and re-engage players. I believe Project Relentless will be an experience that will absolutely fit this requirement. We can't wait to show it off!

Predictions for 2021 from Online Bingo Experts

Given how the year 2020 turned out, who can blame us for wanting to look ahead to the hopes and aspirations of the gambling industry for 2021?

We have some of the most exciting figures from the world of online bingo writing for us, and they have some really interesting insight on what we can expect.



What of the Dreams for 2020?

Before we rush ahead, however, shall we look back and see how last year's fortune tellers fared?

Wide of the Mark

Well, **AI** was mentioned, and given the positive climate at the end of 2019, it seemed a perfectly logical next step in the evolution of online bingo. Oh, how blissfully unaware we were of the challenges 2020 would deliver. We think it is fair to say that other things had to take precedence over such an innovative piece of technology being applied to the game of bingo. For the same reason, those that mentioned cryptocurrencies making a surge in popularity in gambling fell wide of the mark, too.

A few of the pundits did expect the numbers of **new bingo sites** to start rising again, but as you will see elsewhere in the report this did not materialise either. It certainly wasn't the right time for new operators to enter the market given the drop in income experienced by many. Even existing operators had their hands full ensuring that the brands they already had were operating safely and coping with the many new regulations that came into being and handling the 'new normal' that 2020 brought.

Crossover of accounts between land-based and online accounts by the brands that cover both areas made a tentative start. Once again, however, the national and regional lockdowns made rollout almost impossible and measurement of any level of success or failure even harder to evaluate.

Thankfully, not everything came to a standstill and our Gypsy Rose Lee's (OK, they were all men, but can you name any famous male fortune tellers?) scored some hits.

It was anticipated that **mobile usage** would grow even before we were all confined to our homes and **5G** did finally become available – so yes, mobile usage in online bingo and gambling generally has increased. Developers are predominantly innovating with a 'mobile-first' mentality, and the quality of the gameplay has significantly improved.

Payment methods were mentioned, with **Trustly** being namechecked in particular. This form of payment has made leaps and bounds in 2020 – even rebranding itself for a wider market.

The popularity of **Slingo and the style of bingo/slot convergence games** was anticipated to grow, and this has indeed come to pass. Some big name partnerships were made by Gaming Realms as operators were keen to bring Slingo collaborations to market, most notably with Eyecon and bringing us Slingo Fluffy Favourites.

Finally, many of our fortune tellers clearly saw the writing on the wall for **VIP schemes** and the way they are administered. These schemes fell under the microscope when all the regulatory bodies took a long, hard look at possible triggers for problem gamblers. The perks and bonuses that went with VIP status became a lot harder to achieve because of all the checks and direct player contact that became part and parcel of proving one could afford to be a VIP player.

Now, let's see what our panel of experts foresee for 2021.

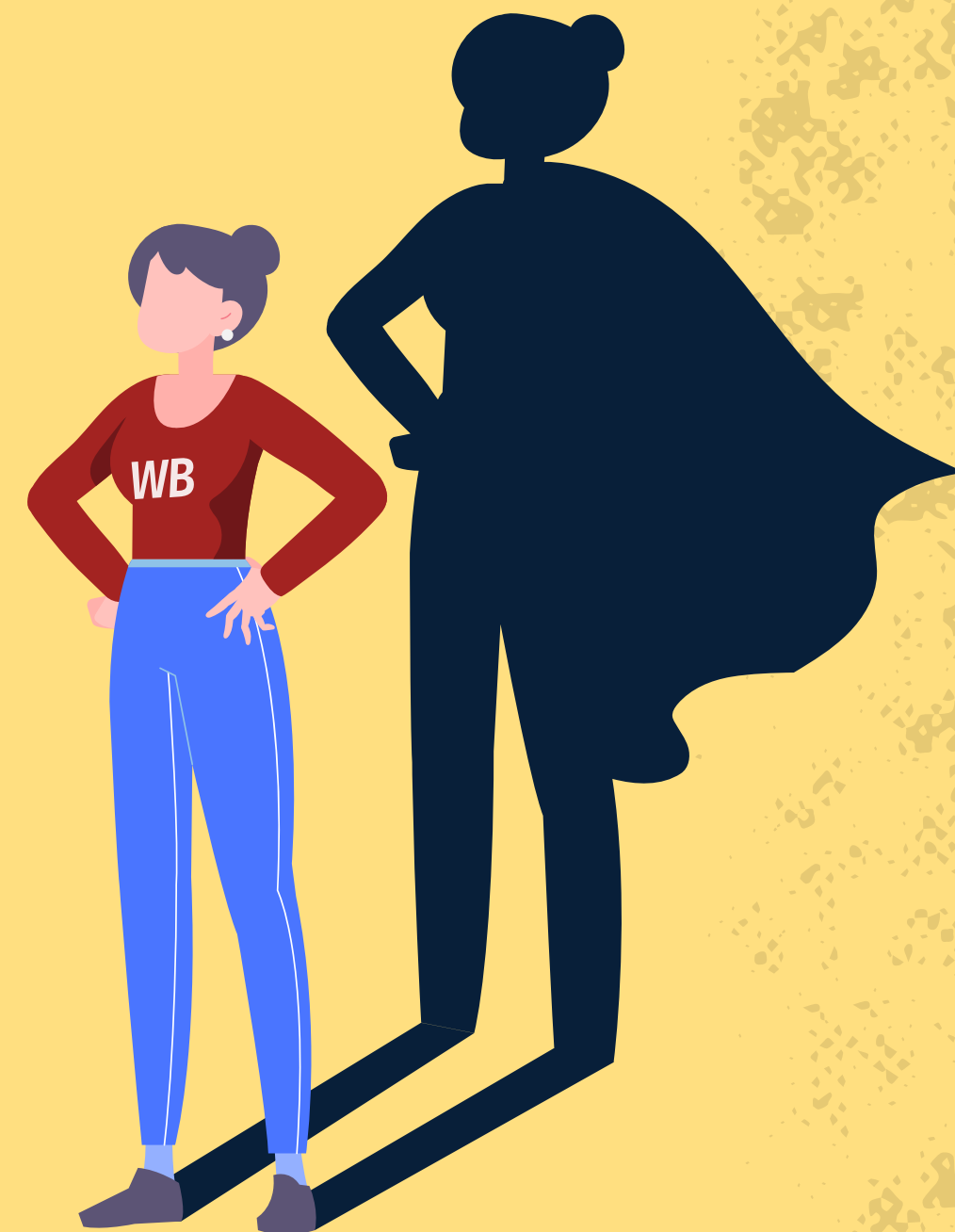




Kris Kukula

Director – Jumpman Gaming

“...the ever-increasing regulatory focus on affordability naturally means that products which offer players value for money in a more casual setting will have a real chance to shine.”



I believe the online bingo landscape will continue to change during 2021. In many ways, I expect to see more of what we have seen in 2020, namely further contraction in terms of the number of existing bingo sites. In a change from last year, however, I predict a real surge in the number of gambling operators deciding to exit the UK market altogether, due to a combination of further regulation, Brexit uncertainty, and the economic impact of the COVID-19 pandemic.

Having said that, I think the changing regulatory landscape will also present an opportunity for online bingo to flourish as a product. The key point here is that the ever-increasing regulatory focus on affordability naturally means that products which offer players value for money in a more casual setting will have a real chance to shine. In many ways, 2021 could truly be the year of bingo's revival!

What is also encouraging is that we are seeing a continued effort to improve bingo on the product side. This means real innovations and a focus on helping the buzz and excitement of desktop bingo translate into an equally engaging experience on mobile. One great example of this is Bingo Blast, which delivers fresh, mobile-first gameplay – let's hope 2021 brings more of the same!

helping the buzz and excitement of desktop bingo translate into an equally engaging experience on mobile.



Despite the various challenges mentioned, there is still an argument for continuing to invest in new bingo sites. I strongly believe that with the right mix of acquisition and retention marketing, there is plenty of room for strong new brands to make a real impact on the market, especially in the context of the opportunity presented by other brands exiting.

Speaking of marketing, affiliates will continue to be a key source of new player acquisition, but I believe that there will be a shift towards requiring gambling affiliates being licensed or registered with the regulator. I also expect further regulation around marketing and advertising, including even more restrictions on TV advertising.

All of this does add up to a more challenging market to operate in, but one which presents a real opportunity for those who play by the rules.





Anthony Conroy
Bingo Revenue Director
MeccaBingo

“The key to player retention and loyalty is around personalisation and meaningful interaction...”



As with most of the world, bingo in 2020 saw some big changes as lockdowns spread across countries and entertainment options became more and more restricted. Streaming services, Joe Wicks, Amazon, 24/7 news coverage, and bingo were some of the most sought after and engaging offerings in the past 10 months. Many people, who would not in normal life have considered playing bingo online, flocked to websites to sign up and have their first taste within a growing community of avid bingo pros. We can see huge spikes in searches for bingo and the top-tier bingo operators through March and April slowly declining for several months. With these new players come new and bigger expectations.

Many of these players belong to a somewhat younger demographic and are seeking something more experiential. To hold onto this new breed of bingo lover, operators are moving towards a much more interactive experience, with live entertainment bringing in the brand momentum. A core driver to this will be around creating an omni-channel experience from brands like Mecca – leveraging the engagement from online communities in chat and on social media – and of course within retail venues like ours when they reopen.

operators are moving towards a much more interactive experience, with live entertainment bringing in the brand momentum



This will see content streamed via chat rooms and on social channels, humanising brands by putting celebrities on screen and making gameplay and product innovation even more dynamic – more ways to win, play, and engage on and offline. Mecca Bingo is already engaged in this kind of activity and sees the rewards it can bring and we know that other operators are keen to follow.

The key to player retention and loyalty is around personalisation and meaningful interaction as well as winnability – trust that jackpots are fair and that they have a chance to win. New product innovation is already being seen within many operators diversifying what has traditionally been a somewhat two-dimensional bingo experience. 2021 will see newer products, promotions, and services driven largely by this demand for a broader and more engaging community experience.





Valentin Micu
Entain Head of Bingo Product

“Live streaming will represent a major growth opportunity in 2021, becoming one of the decision points when choosing a bingo room.”



What a year! In 2020, the industry long-term regulatory challenges were paired with a swift move from club play to online, driven by the global pandemic. This unique combination has defined the focus areas for bingo for 2021.

Longing for the club feeling online

Being part of a community

The social aspect of online bingo is not a new concept, but this year we had a motive to go further and make online bingo truly the place to meet and play with family and friends. In Entain, we tapped into the social interaction potential early in the year and developed a brand-new chat tool for our bingo client, with plans to twist it further in 2021.

Your favourite bingo caller

Would you participate in a bingo game where Gordon Ramsay calls the numbers on video straight from his kitchen? Live streaming will represent a major growth opportunity in 2021, becoming one of the decision points when choosing a bingo room. Feeling in tune with the bingo host and enjoying the live entertainment will increase the loyalty to the bingo operator.

There is more to bingo than bingo halls

Explore the possibilities

New bingo variants and mechanics are always a delight to see. Introducing unique bingo variants and adding new flavours to classics is the best way to stand out from the competition. Entain Bingo is ready to reveal exciting new concepts to the market in 2021 and make some noise.

New markets

Back in the 1940s, the entire American nation was playing and loving bingo. In 2021, the new bingo boom in the US will bring a new wave of innovation and online optimization from the operators. Other regulated markets will follow suit and present fresh opportunities for bingo expansion.

AI and data mining

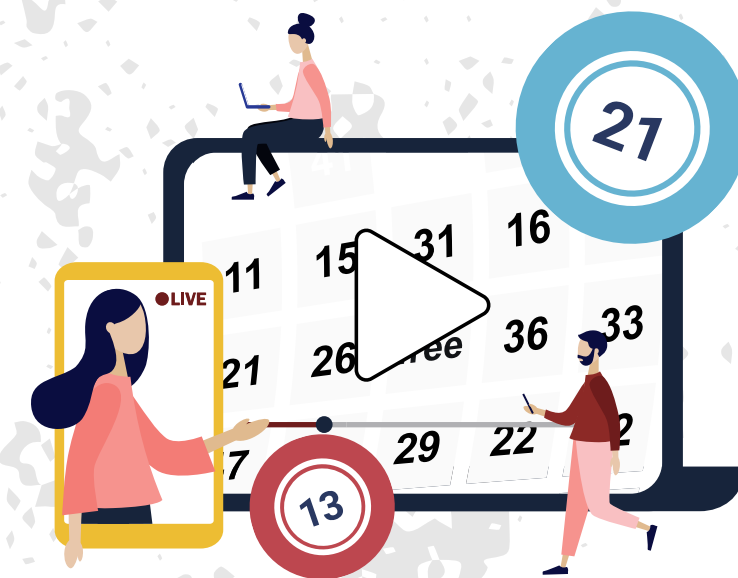
Leveraging the data gathered about customer behaviour and preferences is key to personalising the on-site experience and retaining your customer base. Easier said than done! Huge volumes of data get stuck in databases and convoluted until it becomes unusable. How each provider will curate and use the data will determine the marketplace success for most. At Entain, we're arming ourselves with trusted third party tools to succeed.

The future is in our hands

Innovation is at the core of our industry. The ability to adapt and rebound is rooted deep in our mindsets.

Now, more than ever before, we are well-equipped with smart tools to usher in a new era of entertainment. We have a chance to harness the leading technologies from other sectors and apply them to our organisations.

Finding a fine balance between gaming creativity and regulatory processes will define the way forward in 2021.





Adam Scott
Gaming Operations Director –
News UK

“... the player's choice will be the one who stands out for the right reasons, either through having the best games and features or the best value offering.”



2020 was one crazy year, with very little in it conforming to a 'normal' run given the world was rocked during the same timeframe by COVID-19! Being asked for predictions on what 2021 will look like is interesting as the crystal ball seems very cloudy for us all I expect!

From an online bingo perspective, it will be a mix and depends on how much longer the pandemic keeps affecting our daily lives.

In terms of the online businesses out there, not all will survive.

I am reasonably confident we will see more sites close their doors in 2021, which will pave the way for consolidations through mergers and acquisitions from the larger players in the sector.

Plus, the UK gambling market has faced increased regulation and significant fines over the past few years, so some gambling companies are merely exiting the UK market.

The sad reality is we may see circa 60 land-based bingo halls close permanently. Seeing closures is terrible for an industry I grew up in but conversely, it presents an opportunity to offer an alternative space to play bingo safely to the many customers who will have no club to use.

The replication of the community feeling that players get through being a member of a local bingo club remains a crucial challenge for us online operators. This includes challenging ourselves to be open to changes in the mix of game types we schedule, the times they play out, and the offers and promotions surrounding them

to more closely match the experience to the land-based one that this new audience will recognise. Also, promos need to be looked at differently in the short term (no point winning a holiday to Spain when you can't leave your postcode for another six months!).

The opportunity to innovate in the bingo space has always been there, and 2021 changes nothing. With so many similar propositions out there, the player's choice will be the one who stands out for the right reasons, either through having the best games and features or the best value offering.

Ideally, we should all be aiming for a happy mixture of the two. I suspect with the lockdowns and people physically being at home more, play will have reverted to a larger portion of games being on laptops and desktop devices.

We must remember, however, that the world will be open again before long, so a mobile-first approach to the player experience should continue to be in our site and game design conversations. Who knows, maybe this is the year we finally see a VR bingo offering emerge: Imagine marking your bingo tickets whilst looking over the Grand Canyon, yet not actually moving from your home office in Durham! With hardware for this tech becoming so much more attainable for the mainstream audience, this could be an interesting direction of travel for sure.

One thing I am hopeful for in any case is that 2021 sees us all being as safe and healthy as possible and allows us to get back to our 'new normal.' Hopefully, we will have taken some valuable lessons from 2020 and will be using these to propel our businesses forward in a way that benefits our people, players and our firms in equal proportions.





Harry Lang
Marketing Director
Buzz Bingo

“...technology is going to be increasingly important in tailoring the bingo experience to the individual user.”



With 2020 being such a tricky year, I don't think I'm alone in looking forward to 2021 as a year of opportunity. Bingo in the UK has been a game of two very distinct halves – while retail clubs have had to be closed down through three lockdowns, online and mobile bingo have flourished as retail players have migrated across to digital. I'd anticipate the balance returning during 2021 so hopefully, things will get back to normal again, and we can all look back at 2020 if not fondly, then at least as a period we struggled through together with steely British resolve.

I'm certain that all the bingo brands, both online and offline have loads of really exciting plans ahead. From our experience at Buzz Bingo we know that the online and mobile bingo sites remain hugely popular thanks to a good blend of game content, varied ticket prices, excellent promotions and, of course, free bingo.

For those on the retail side, bingo clubs and the wonderful people who work in them will go from strength to strength, offering a friendly and fun entertainment experience for anyone who comes through the door, whether they be 18 or 100 years old. Bingo must remain at the 'entertainment' end of the gambling spectrum and as an industry the aim to put a smile on everyone's face whenever they play, either digitally or actually, must be paramount.

We have a fantastic community of players both in our clubs and on our mobile and web sites and for me as a fairly new addition to the Buzz team, getting to know them and understanding what they want from us is the highest priority. This should also be true of operators across the board if the industry is to continue to flourish as we all wish it to.

One area that I believe will be of particular importance is how technology is going to be increasingly important in tailoring the bingo experience to the individual user. At Buzz Bingo, for instance, we plan to bring our online and club bingo experiences closer together. Shared prize pools are just the beginning in terms of our longer-term plans, and a single customer experience is on our 'to do' list. Increasing the choices of 'player favourite' bingo and slot game content is a priority for us, whilst still focusing on creating our original games, too.

Finally, marketing! All sorts of new ways to reach a wider audience and make a brand stand out will be seen. Licensing deals, partnerships, and sponsorships for the bigger brands that can afford them will help with visibility and making them attractive to players. Bingo has often been the unexpected source of charity income and community solidarity and the latter in particular has become more obvious since the beginning of the coronavirus pandemic. Many retail bingo providers gave over kitchens to prepare food for the needy in their communities and staff and volunteers have helped to distribute it. Buzz Bingo has run a scheme to try and help their vulnerable and elderly customers feel less lonely. 'Buzz Buddies' sees general managers regularly call the community to check how they are and make sure they're feeling okay. For many, visiting their local bingo club is their main way of socialising and staying connected, which means that club closures have had a huge impact on customers' mental health – and everyone at Buzz Bingo and the wider bingo world wants to ensure everyone is okay and will endeavour to ensure this overview of customer well-being continues.

In the same spirit, I hope all WhichBingo readers stay safe, keep their chins up and look out for each other – better times are ahead!



Bingo Sites and Software

2020 was a year of consolidation for online bingo. Only seven new bingo sites opened for business, while 20 closed down and 40+ had major makeovers or moved software ready for big relaunches in 2021.

While gambling doom-mongers would have us believe that online gambling operators wanted to take advantage of the unfortunate lockdowns, this has not materialised in brands being rushed to market to cash in.

The market looks like it might have stabilised to where it needs to be for healthy competition, with 252 actual online bingo sites available to play.

A Different Outlook

Our review of site openings and closures takes into account brands operating as bingo sites, not casino and slots sites that have a bingo add-on. This means that Pragmatic Play will not show with as many sites as you might imagine as they are still not operating as a white-label like Dragonfish – pretty much the only one now left.

Anyone looking to open a bingo site no longer has the choice of four or five operators as they once did – Dragonfish, Cozy, Microgaming, Jumpman, or Playtech. Microgaming has exited the bingo market totally and Jumpman abandoned its proprietary software in favour of Pragmatic Play. Cozy had become Electraworks, and it now only operates its own Entain owned brands.

Software
Provider

Number of new online bingo
sites opened in 2020 by
software provider



Defections and Re-Designs

Playtech Losses and Gains

What we did see in 2020 was Rank take centre stage as an online bingo operator following their purchase of Stride, a firm which had already acquired 25% of the market itself. A lot of the acquired sites were quietly put on the back-burner while up-front attention was given to bigger names in the portfolio, like Lucky Pants Bingo and Kitty Bingo. Both these brands have moved from the proprietary Daub software they launched on to the more mainstream Playtech bingo platform, joining stable-mate and market leader Mecca Bingo.

These migrations happened late in the year, reversing losses made by the Playtech team as they lost Coral and Ladbrokes to their owners platform Electraworks; Bucky Bingo to Dragonfish; and Club3000 and Mirror Bingo to the Pragmatic Play platform on Jumpman Gaming.

Not all the Daub brands were deemed viable for the Playtech, however, and instead, Dragonfish gained some new clients!

Gamesys Losses

Gamesys brands as a general rule can be regarded as a success story with Jackpotjoy and Heart Bingo leading the way. It came as a surprise, therefore, when a number of the white labels on the platform decided to part company. The magazine-owned brands decided that Dragonfish software would be a better fit. Gamesys said goodbye to Woman’s Own Bingo, Woman Bingo, Chat Mag Bingo, and Pick Me Up Bingo in June 2020.

ElectraWorks Streamlining Complete

It became clear early on that only Entain brands were to be utilising the ElectraWorks Cozy platform. That meant that the few brands that had survived the 2019 cull had to find new homes fast or also shut for good.

Nine brands decided enough was enough and closed down and eight opted for Dragonfish, Jumpman, or even Nektan – another Pragmatic Play partner.

The remaining Electraworks brands, Foxy Bingo, Cheeky Bingo, Ladbrokes and Coral are all being steadily developed, with licensed big name bingo games like Friends and Fluffy Favourites – following the lead of Playtech in finding the best way into player’s hearts.

Software Provider

Online bingo site closures 2020 by software provider

Dragonfish



Jumpman Gaming



Bede



Microgaming



Playtech / Virtue Fusion



Electraworks



What to Watch for in 2021

As you can see from Table 3, there are 252 active bingo sites trading as bingo sites. As we have said, this does not take account of the many slots and casino sites that now have a Pragmatic Play Bingo add-on

120+ Nektan brands

140+ Jumpman brands (in addition to the bingo brands in our table)

LeoVegas brands and Skill-on-Net brands are being added too, with many more anticipated.

This means that Pragmatic Play is far and away the actual leading bingo platform in the UK as we head into 2021.

Online bingo sites by software provider		2020	2019	2018	2017
	Dragonfish	165	150	181	192
	Electraworks (ex Cozy)	4	18	113	106
	Jumpman Gaming/Pragmatic Play	48	41	34	42
	Playtech / Virtue Fusion	18	20	31	31
	Microgaming	0	8	8	9
	Gamesys	2	7	6	9
	Pragmatic Play	5	3		
	Proprietary	3	3	5	4
	Daub	0	4	4	4
	Leapfrog	4	4	4	4
	Bede	0	3	7	4
	Relax	2	2	4	3
	Parlay	0	2	7	10
	B-Live Gaming	1	1	2	2
110	Total	252	264	421	437
					111

It is little wonder that Pragmatic Play took the title for Best Bingo Software in the WhichBingo Awards 2020 given these figures and the efforts they are putting into developing new and exciting bingo games for the platform.

That meant that They have a real affinity for online bingo and it shows in the games they produce.

Other operators can no longer rest on their laurels and expect to sell their platform based on a stale inventory. Players want more, and they want innovation and excitement.

We don't expect too much in the way of further new bingo platforms to emerge, but we do hope to finally see the revolutionary new game we have been promised since 2019 by Positively Distinctive Media. This is said to be a fusion of game show and bingo to bring all the excitement anyone could ever want. 2021 should be the year we finally get to see it in all its glory.

Importance of Community in Online Bingo

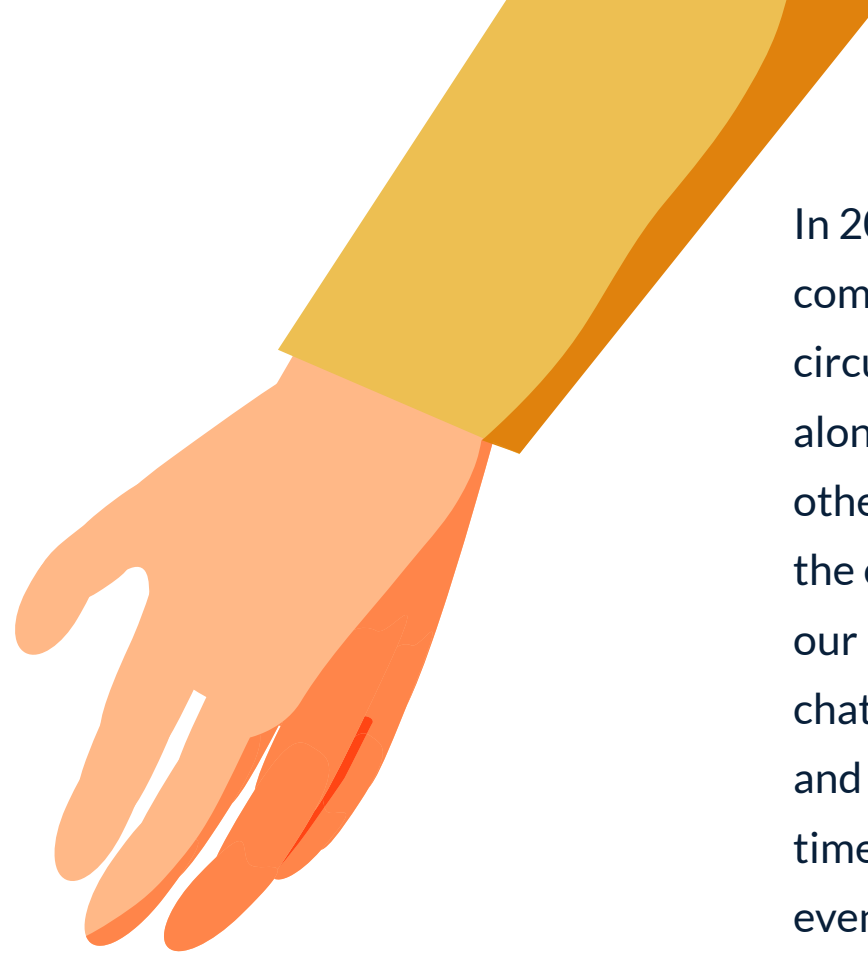


All the most successful online bingo sites seem to be ones with a strong sense of community and a close connection with their players. That could be via an amazing chat team, great social media, fun-filled offline events or some amazing live-streams with giveaways galore.

Being present for players is an element of online bingo that cannot be undervalued and translates well to customer retention and loyalty as well as monitoring player safety and well-being in some cases.

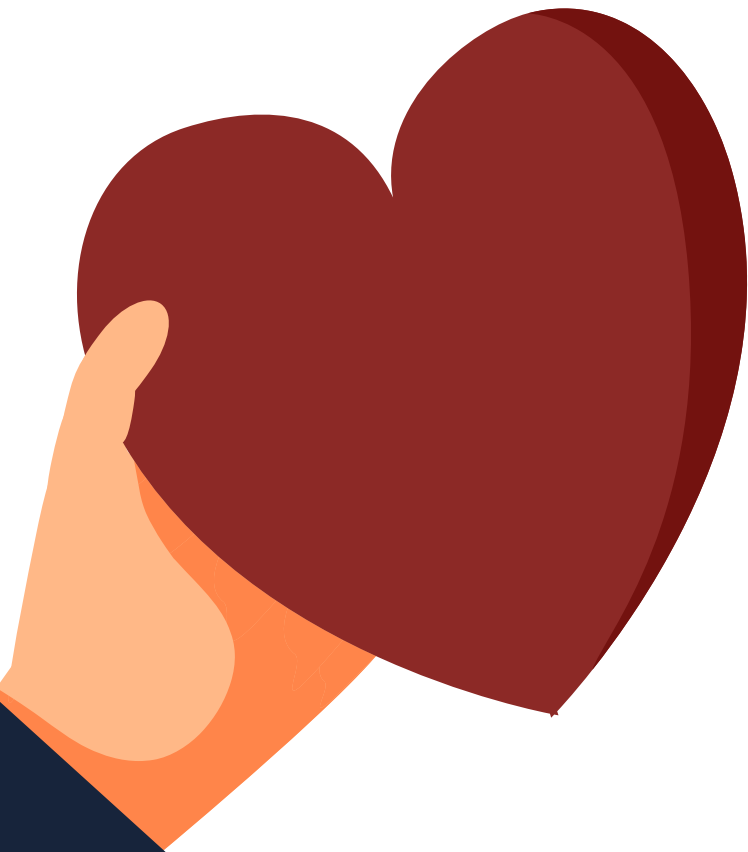
Harvey Kirk
Sun Bingo Account Exec

“We hope that we’ve helped those that have struggled in the last year.”



In 2020, it was more important than ever to provide a feeling of community on Sun Bingo. Of course, we faced unprecedented circumstances that affected everyone, especially those that live alone and relied on leaving the house to be able to interact with others. Something we’ve always been proud of at Sun Bingo is the community that we have with our players and chats hosts in our rooms. It’s thanks to all our players and the hard work of the chat hosts that we’re able to provide that sense of community, and make sure that everyone is having fun and enjoying their time on Sun Bingo, whether it be through games, stories, or even through chatting about the latest soap goss!

We hope that we’ve helped those that have struggled in the last year. Even if it was just a friendly ‘how are you?’, we hope we’ve brought some positivity in what has been one of the toughest years in memory. The importance of the Sun Bingo community cannot be overstated and even as we turn the corner in 2021 and look to get our lives back to normal, we want our community to continue getting bigger and better.



Mark Fletcher

Head of Brand Communications – Buzz Bingo

“Regular players who rely on bingo clubs as a safe place to take time out of busy lives have lost an important community hub.”



The day before her one hundredth birthday, Eunice Greenwood hopped into a limousine to make her usual Sunday evening trip across town with her daughter Glennis. It was a very normal trip taken in a very unusual way – Eunice hadn’t missed her weekend bingo in 45 years but this one came with a hair stylist, chauffeur, celebration cake, and a red carpet entrance.

Special moments like this were a regular sight at bingo halls up and down the country before COVID-19 disrupted everyday life. And while bingo’s overall popularity has declined over many years before the pandemic, those who love bingo have never lost their zest for the game or underestimated the important role bingo clubs play in their communities, even during the global pandemic.

For Eunice, bingo was always about socialising and getting out of the house. ‘Everyone knows me at the club, and they look out for me. It’s a real community,’ she told the local newspaper. Even at 97, she would pop into town three times a week to play. Her weekly sessions were a chance to meet up with her family. ‘Bingo means everything to me. I’ve been visiting Buzz Bingo Keighley with my daughter every Sunday since the ’70s and couldn’t have celebrated my 100th birthday anywhere better.’

Bingo's vital role providing a safe space for socialising became much harder in 2020. Throughout the first lockdown, bingo clubs across the country invested in the tech to keep in touch with vulnerable customers and made over 20,000 phone calls to people who were most in need of someone to talk to. Meals were served to NHS workers, homemade face masks sewn up in their hundreds, and furloughed bingo staff volunteered to help the most vulnerable. By the second lockdown, amidst increasing concern of loneliness in the community, some bingo callers were turning to TikTok memes to entertain customers on social media. Steve Edward from Buzz Bingo Grimsby grabbed a microphone and wowed his players by belting out classic songs over Facebook Live to keep spirits high, whilst other bingo clubs swapped calling numbers for calling live streamed quizzes.

As 2021 starts, our communities face more time at home and no firm expectation of when we can cuddle, hug, high five, or see each other's smiles in person again. Regular players who rely on bingo clubs as a safe place to take time out of busy lives have lost an important community hub. Bingo clubs will continue to find ways to entertain and connect through social media, charity work, and their love for the game.

We may see online bingo platforms strengthen their appeal by taking inspiration from physical bingo club experiences and popular live entertainment streams.

And whilst we might not be able to send limousines for everyone when bingo clubs reopen, there'll definitely be celebrations when we can meet again in the real world and, with a little luck, lots of hugs and cake too.

UK GAMBLING REGULATION

We constantly write about operators, brands, and affiliates struggling to keep abreast of “all the regulatory changes” that are thrown at them, but are there really that many? And have you missed any of them?

We asked David Clifton, one of the UK’s most respected and experienced specialists in gambling law and regulation, to give us a round-up of everything that came to pass in 2020 that the industry has had to deal with – and are suitably shocked seeing them all in one place!

David Clifton, Director,
Clifton Davies Consultancy Limited

That was the year that was, but what's coming next?

No-one can possibly deny that 2020 was a year like no other. That's not just for the obvious 'C-word' reason. It's also been a year of challenge for all sectors within the UK's gambling industry, coping with a seemingly ever-increasing regulatory burden whilst also facing constant hostile criticism from politicians, the media, and the public alike. That is unlikely to diminish now that the government's review of the Gambling Act 2005 has launched.

In the opinion of many, that sense of legislative balance has been eroded by a regulatory clampdown on UK licence-holders over the last five years. This has coincided with a dramatic diminution in public trust in the gambling industry. It's too easy to lay blame for this, as some have done, at the door of certain sections of the media. Instead, increasing numbers within the industry have come to recognise that the roots of this diminished trust lie within an online gambling sector that, in the

period since introduction of the place of consumption regime at the end of 2014, failed to sufficiently accelerate its pace of change in raising regulatory standards to those expected by the Gambling Commission.

However, it's not even as straightforward as that. The Commission acknowledges that problem gambling rates have remained "static" over the last ten years. Recent data has shown that – far from 2020's coronavirus lockdowns resulting in the explosion of online gambling activity and consequential dramatic increase in numbers suffering from gambling-related harm feared by some – a pattern has continued of committed gamblers gambling more and playing 'harder' (in the sense of highly repetitive and faster play cycle forms of gambling).

One also needs to add into the mix criticism of the Gambling Commission from the National Audit Office in February for not having a full understanding of both (a) the impact of its work and (b) whether it is achieving its overall objectives to protect consumers. In June, it was slammed by the House of Commons Public Accounts Committee for similar reasons, being described as "slow" and "weak."

THE PAST YEAR

Gamstop and the Credit Card Ban

HVCs

Other LCCP Changes

Safer Advertising

Game and Product Design

Reversal of Customer Withdrawal Requests

Customer Interactions & Affordability Checks

The Single Customer View

Regulatory Enforcement

National Strategic Assessment

The Gambling Act Review

2019 ended with confirmation that the UK government would fulfill its General Election manifesto promise to conduct a review of the Gambling Act 2005, “with a particular focus on tackling issues around online loot boxes and credit card misuse.” As is now abundantly clear, those who thought they would be the only areas of focus were very mistaken.

As subsequent months passed, and commencing the review slipped down the government’s list of priorities as the COVID-19 pandemic hit home, the Gambling Commission proceeded to address some of the issues that were otherwise destined to appear on the review agenda.

Gamstop and the Credit Card Ban

First up were announcements in January that (a) participation by online operators in GAMSTOP would be compulsory from 31 March 2020 and (b) a credit card ban for all forms of remote gambling would come into effect on 14 April 2020.

HVCs

Next on the Commission's hit-list were VIP, or high-value, customers. In conjunction with the Betting and Gaming Council, major online operators addressed an October 2019 challenge by the regulator's CEO by setting up three working groups, including one that focused on HVC incentivisation. The Commission reacted positively to that group's recommendations in April, saying it would consult on the introduction of corresponding changes within its Licence Conditions and Codes of Practice. That consultation (commenced two months later) subsequently went through one of the fastest ever such processes, with its outcome announced at the end of September and a one-month deadline imposed for its implementation. With the need to take sustainable affordability, vulnerability/safer gambling, and enhanced due diligence factors into account for each individual HVC, operators were given a very short period of time within which to finalise their HVC policies before the 31 October deadline.

Other LCCP changes

That date also marked other LCCP changes, including a new licence requirement requiring all operators to self-report any actual or potential breaches of anti-money laundering legislation (in the case of casino operators) or Proceeds of Crime Act breaches (in the case of non-casino operators).

Safer Advertising

Alongside the above-mentioned HVC project, a working group was also set up for safer advertising online. Its recommendations were welcomed by the Commission, as a result of which the Ad-Tech working group continues with its project, and new social media marketing requirements were set out in the 6th edition of the Gambling Industry Code for Socially Responsible Advertising published in August.

Game and Product Design

However, the Commission reacted less favourably to the recommendations of the third working group (focused on game and product design), describing it as having “fallen significantly short” in a number of respects. It was a case of ‘too little too late’ when the BGC subsequently announced in September a new online Game Design Code of Conduct (involving slower spin speeds, more checks on players, and improved access to safer gambling information) because, by then, the regulator had already proceeded with its own consultation on online slots game design and reverse withdrawals. The outcome of that is still awaited, although it’s clear we will definitely see the introduction of compulsory new controls for online slots (including speed of play limits and prohibition of multiple slot games and player-led ‘spin stop’ features).

Reversal of customer withdrawal requests

The complete removal of operators’ ability to reverse customer withdrawal requests is also a foregone conclusion, not least because – along with the need for improved affordability checks and restrictions on bonus offers – it was included as a requirement in the Gambling Commission’s

additional customer interaction guidance for remote operators during the COVID-19 outbreak, introduced without any prior consultation in May 2020 and still remains in force as I write this article.

Customer Interactions and Affordability Checks

Any relaxation of that additional guidance is unlikely to arise from the Commission’s current Remote Customer Interaction Consultation and Call for Evidence, which ran until 12 January 2021. Indeed, it seems a foregone conclusion that affordability checks will become much more demanding, including a requirement for mandatory affordability assessments to be conducted on customers within all remote gambling sectors. Those assessments will have to be conducted at financial thresholds set not by operators, but instead by the Commission, that could conceivably be as low as £100 loss per calendar month. Although this raised the question whether it is constitutionally wrong for such a fundamental policy change affecting personal freedoms to be considered otherwise than in Parliament as part of the Gambling Act Review, it now appears that the government disagrees and I strongly suspect this is already a ‘done deal.’

The Single Customer View

It is hoped that 2021 will see meaningful progress made with the 'single customer view' project, described by some as 'the silver bullet' to help reduce gambling harm where customers have multiple online accounts. Hope also exists that we will see more signs of the finance industry reacting positively to the Commission's invitation (extended in October) to join a multi-sector partnership approach to tackling gambling harm.

Regulatory Enforcement

In terms of regulatory enforcement, 2020 saw a UK licensed operator required to pay a record Gambling Commission penalty – £13million – for AML, social responsibility and customer interaction failings, with another (at £11.6million) not far behind. Licence revocations included one that emphasised the importance of being able to prove a legitimate source of funds to the regulator's satisfaction when acquiring or investing in a gambling business. We also saw the Commission's regulatory attention turn towards white label providers and betting exchanges.

Online bingo operators were not immune from that attention either. The Gambling Commission's annual Compliance & Enforcement Report (published in November) records one online bingo customer receiving automated bonuses and being allowed to continue playing without restrictions or meaningful interactions, despite (a) displaying concerning behaviour linked to speed of losses and length of play and (b) generating 56 automated 'pop-up' safer gambling messages and 13 in-play messages.

National Strategic Assessment

On the same day it published its Compliance & Enforcement Report, the Commission published its first ever National Strategic Assessment in which it identified online bingo – as well as online slots – as a higher risk product. Its logic was that such products are likely to be attractive for problem gamblers because they “typically provide players with the opportunity for fast-paced, repetitive and chance-based games which are available 24 hours a day.” The regulator has made it clear it is “focusing on products that behave like this, and the measures that can be put in place to make these products safer.” This will become an area of even greater focus as more evidence emerges of increasing numbers of women not only experiencing problems with this style of gambling, but also being more reluctant than men to seek treatment. This was one of many issues identified by the Gambling Related Harm APPG in its Online Gambling Harm Inquiry Report, when its recommendations included “a large-scale piece of work” to understand female problem gamblers and addiction.

The Gambling Act Review

The Review was formally launched by the Government on 8 December, the same day that it published its formal Response to the House of Lords Select Committee report on the Social and Economic Impact of the Gambling Industry (published in July), which has served to shed light on its current thinking on a number of key issues.

What Can We Expect in 2021?

2021 will inevitably be dominated by the Government's review of the Gambling Act 2005.

With that in mind, the Gambling Related Harm APPG was the first group of Parliamentarians off the blocks in 2020 with its recommendations in June for greater protections for online gamblers and a complete overhaul of gambling regulation in the UK that it maintains will produce a new Gambling Act "fit for our digital age."

It's now clear that some of the APPG's recommendations must be taken more seriously than when they were first published including, for example, affordability limits set and imposed by the Gambling Commission. As mentioned above, that is on its way to becoming a reality. With cross-party support for its recommendations, other proposals made by the APPG should not be dismissed. Obvious examples include the imposition of stake, deposit, and prize limits for online gambling, a ban on all gambling advertising and prohibition of all VIP schemes and inducements.

Whilst the subsequent report by the House of Lords Select Committee adopted a slightly less forceful stance in relation

to those issues, their lordships nevertheless saw eye to eye with the APPG on the need for a Gambling Ombudsman for consumer redress purposes and a mandatory RET levy payable by gambling operators on the "polluter pays" principle.

Its additional recommendations included (a) adoption of a new system to test and categorise all new games against a series of harm indicators, with stake limits (or approval withheld) for any that score too highly, (b) equalisation of speed of play and spin with games in land-based gambling premises, and (c) imposition on the gambling industry of an enforceable 'duty of care' to avoid harm to their customers. These proposals look set to be taken forward by the 'Peers for Gambling Reform,' a new pressure group chaired by Lord Foster of Bath.

On other fronts, operators shouldn't be surprised to see restrictions introduced on promotional offers, bonuses and other incentives.

However, first impressions from the Government's recent Response to the House of Lords Select Committee report are that there may have been no need for the 'U-turn' decision by Responsible Affiliates in Gambling to support in principle a licensing or registration regime for gambling affiliates.

Even though the government has made it clear that a “robust evidence base” is essential for effective policy making and regulation and that it needs to balance ever more tightened regulations against the black market moving in, I foresee this country’s commercial gambling industry – including the online bingo sector – experiencing greater controls in future over the way it is permitted to operate, with all of the accompanying increased cost and reduced revenues consequences that will bring. It's time to fasten your seat belt for another bumpy year ahead.



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