



Bingo - UK - 2023

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This report looks at the following areas:

- The impact of the cost-of-living crisis on bingo play.
- Changes in participation habits emerging from the COVID-19 pandemic.
- Threats and opportunities presented by anticipated changes in gambling regulation.
- The growth of new entertainment-led retail bingo formats.
- The introduction of digital technologies to in-person play.
- Changes in device usage for online participation.

Despite bingo's image as an older people's game, in-person participation rates among 18-45s are more than three times those of over-45s and more strongly skewed towards younger age groups than in online play.

Bingo participation in both channels is vulnerable to the cost-of-living crisis, with only one in five players saying they would maintain their current habits even if they needed to cut back on their leisure spending.

Beyond the income squeeze, the biggest threat the retail segment faces is presented by the reluctance of older customers to return to clubs following the COVID-19 pandemic. The main dangers for the remote segment are tighter regulation and strong competition from other online gambling products.

The biggest growth opportunity for both segments will emerge from the shift in the wider gambling market's strategic focus towards recreational play, which is being led by the free-to-play games and social entertainment with which bingo is an established good fit.



"The bingo market looks vulnerable to the cost-of-living crisis, with only one in five players determined to maintain current habits if they needed to cut their leisure spending. The retail segment is more vulnerable than the remote, but both will need to focus on value offers and player acquisition to protect revenues."

– **David Walmsley, Senior Leisure Analyst**

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