

**REPORT ON BINGO,
13Mar08**

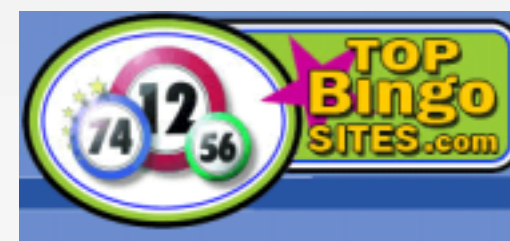
UK ONLINE BINGO ~ MARKET INSIGHT

- Introduction
- Player Numbers
- Make up of the market
- The future
- Q&A

PHIL FRASER

- i-Ludus Consulting
- Focus Online Management
 - Bingo Portals
 - Free to Play Sites
 - UK & International

INTERNATIONAL ONLINE BINGO



UK ONLINE BINGO



UK BINGO PLAYERS ~ THE NUMBERS



Gambling Prevalence Survey – Sept 07

UK BINGO PLAYERS ~ THE NUMBERS



Remote Gambling Participation Survey – Oct 07

UK BINGO PLAYERS ~ THE NUMBERS



Remote Gambling Participation Survey – Oct 07

UK BINGO PLAYERS ~ THE NUMBERS

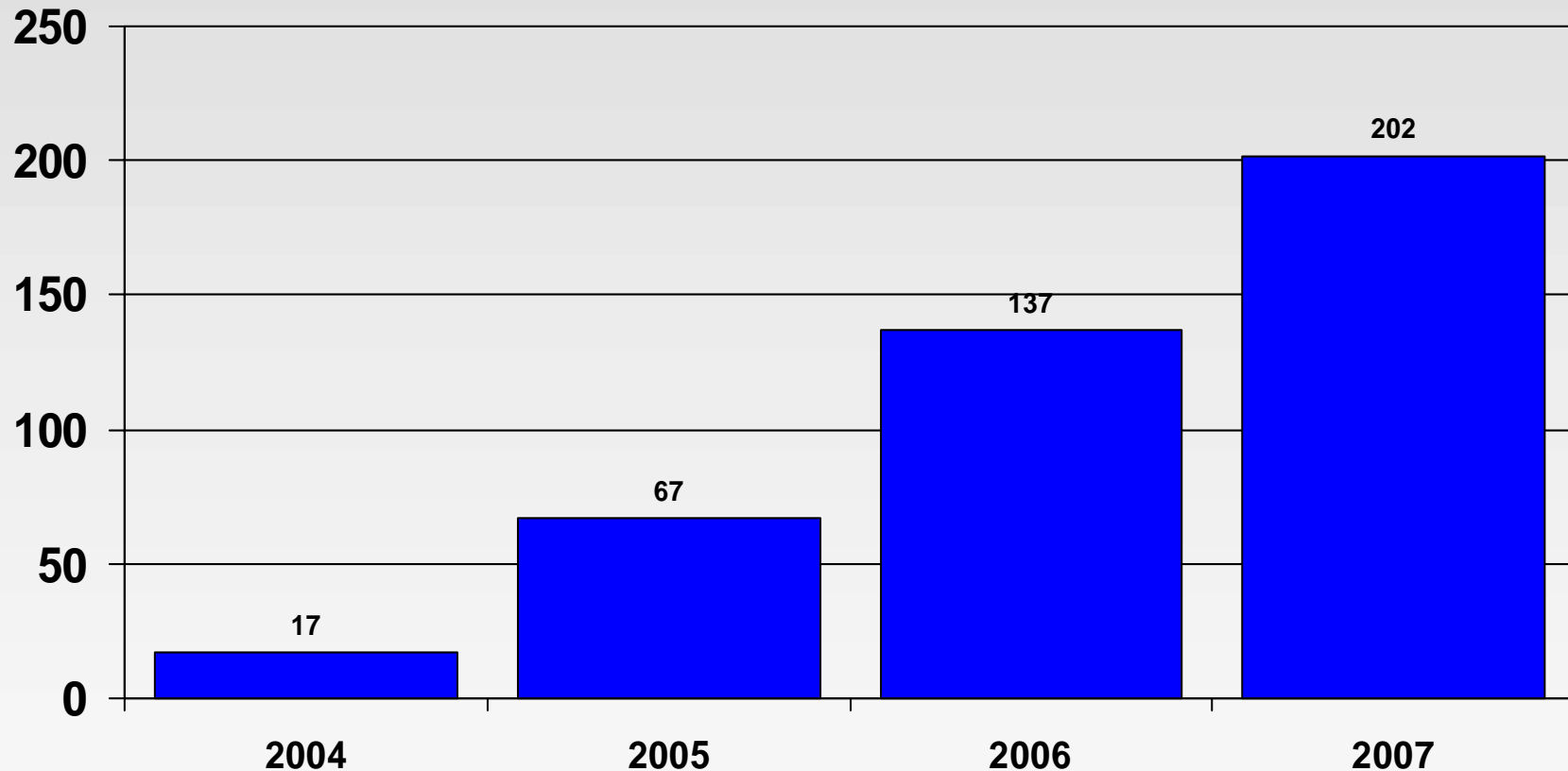


Office National Statistics 2006

UK BINGO PLAYERS ~ THE NUMBERS

- Land Bingo – 7% = 3.36m
- Online Bingo - 1.2% = 576,000
- Online Bingo - up 71%

MAKE UP OF THE MARKET ~ NUMBER OF SITES



MAKE UP OF THE MARKET ~ MAJOR NETWORKS

- Cassava 41
- Cashcade 32
- St Minver 23
- The Gaming Network 14
- Virtue Fusion 8
- Better Bingo Network 7
- Bonanza Network 5

MAKE UP OF THE MARKET ~ MAJOR NETWORKS

- Cassava (**Cassava**) 41
- Cashcade (**Cassava**) 32
- St Minver (**Parlay**) 23
- The Gaming Network (**Parlay**) 14
- Virtue Fusion (**VF**) 8
- Better Bingo Network (**VF**) 7
- Bonanza Network (**VF**) 5

THE FUTURE

- Cleverer marketing ?
- Bigger marketing budgets ?
- Major brands leave networks ?
- More software options entering market ?
- Mobile Bingo ?
- Merge of internet, land and iTV ?

PHIL FRASER

- email: phil@whichbingo.com
- Mobile: 07960 490416