

Gambling MAP

Over the last 10 years the gambling industry has been one of the fastest growing industries around the world – but now faces a period of uncertainty with increased competition and the growing voice of detractors. With casinos established in many parts of the country, the proliferation of gaming machines throughout hotels and clubs and the introduction of internet gambling - gambling is more accessible now than ever before.

Gaming, in particular, is no longer seen as a separate entity to other social activities. The gaming industry has recognised the need to incorporate poker machines into a 'full entertainment package' such as dining, shopping and going to the cinema. This has introduced the gaming industry to new markets and hence new competitors and new threats.



How to improve the odds in marketing your gaming product.

Gambling MAP (Marketing and Advertising Planner) identifies the primary determinants of gambling spend, frequency and venue on an activity by activity basis.



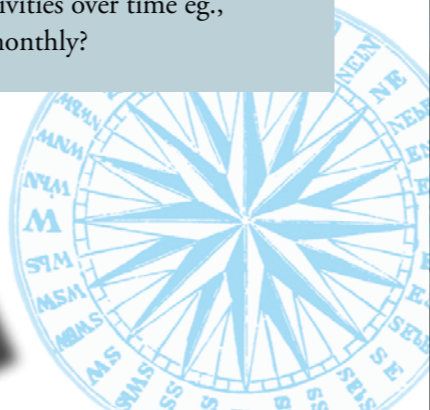
This information is tracked on an ongoing basis, allowing marketers to identify important trends and patterns as they emerge eg., the impact of changes in legislation on participation and spending.

Gambling MAP is part of Roy Morgan *Single Source*. Therefore, as well as providing a comprehensive analysis of the gambling market, it provides a direct link to media usage (facilitating more targeted media planning), attitudes and Roy Morgan *Values Segments*¹ (for better communications), and lifestyles and activities (for identifying and evaluating sponsorship and cross-marketing opportunities). It is also directly linked to other allied industries such as alcoholic beverages, smoking, tourism and finance.



Accurate answers at your fingertips.

- How can you identify who gambles and what forms of gambling they participate in?
 - How *often* do they gamble?
 - How *long* do they gamble?
 - How much do they *spend* on gambling?
- What are their attitudes to gambling and what are their preferences?
- How can you quantify each of the market segments within gaming, wagering and lotteries?
- How can you build insightful profiles of gamblers?
 - Can you identify gamblers by demographics?
 - How can you understand why they gamble?
 - What are their attitudes to gambling and societal issues?
 - What are their activities eg., sport, shopping?
 - How can you monitor these gambling and other activities over time eg., quarterly, monthly?



Gambling MAP

Gambling MAP Modules

The three components can be individually accessed or combined with others depending upon your needs.

Gaming

This component provides an insight into the number of people who gamble on poker machines and/or casino table games. An excellent tracking device for monitoring growth within the industry, it includes participation, frequency of playing and expenditure, allowing proven customers to be easily understood.

Gaming behavior can be analysed by venue (ie clubs, pubs or hotels and casinos). Examine venue and brand loyalty, market share, both overall and for specific activities and identify comprehensive measures of venue loyalty.

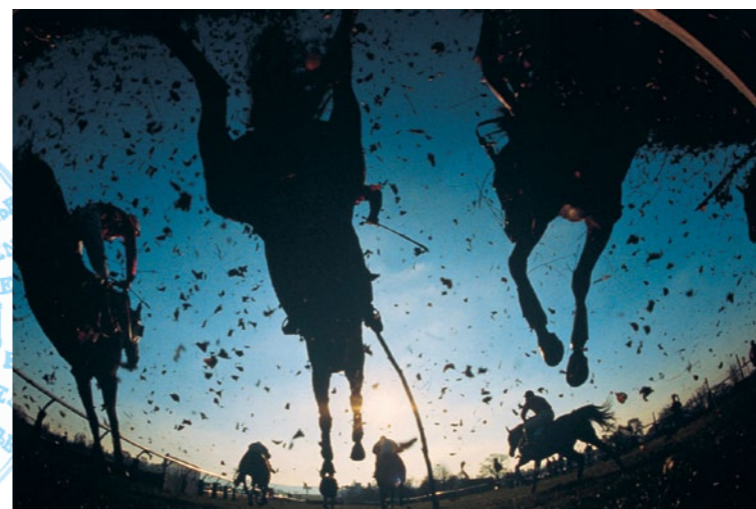
Wagering

Participation in all forms of wagering is monitored – consisting of Horse Racing, Harness Racing, Greyhound Racing and Sports Betting. The information allows analysis of betting method and channel.

Monitor growth in the industry and investigate patterns of behavior and changes in societal attitudes that may impact your business.

Lotteries/Scratch Tickets

This component provides a comprehensive understanding of gambling activity in the lotteries and scratch ticket market. Gain invaluable insights into frequency of participation, expenditure and method of entry. If purchased in conjunction with other components of the Gambling MAP, users can gain a better understanding of overall gambling behavior, and the share of gambling dollars attributed to lotteries and scratch tickets.



Key applications include:

- Market Segmentation – by demographics, geography, frequency and attitudes
- Market Opportunities – growth segments, cross-sell, sponsorships and venue location.
- Tracking of trends over time – market share, awareness, trial.
- Societal issues - attitudes to gambling and related concerns.
- Linkage to other interests – finance, smoking, travel, sports and leisure.
- Communication strategies – readership of newspapers/magazines, TV programs watched.

Powerful ASTEROID Windows software.

As opposed to conventional 'paper' market research reports, Gambling MAP is provided on disk with user friendly 'data analysing' software.



Called ASTEROID, this software ensures the data can be re-cut and re-analysed to suit changing business needs.

As an integral part of your subscription, Roy Morgan's specialist analysts will train your staff and conduct workshops to ensure that you can extract the maximum benefit.

To fully appreciate the power of Gambling MAP call to arrange an obligation-free presentation.

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— Research —

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CERTIFIED QUALITY MANAGEMENT SYSTEM ISO 9001

*Devoted by Michele Levine of Roy Morgan Research and Colin Benjamin of The Horizons Network.

Discover your edge