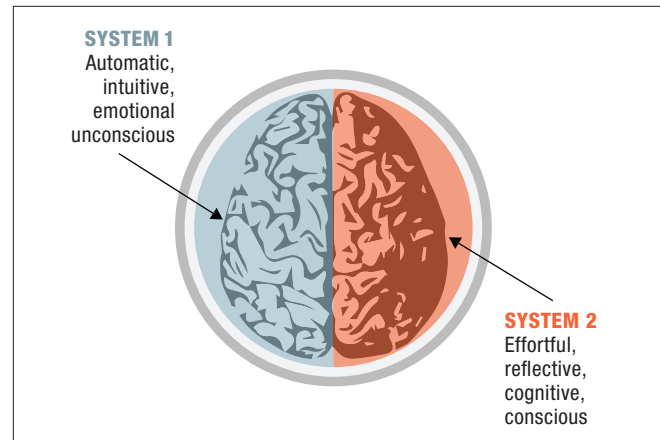


MEASURING BRAND EQUITY AND ITS IMPACT ON MARKET SHARE IN THE LOTTERY & GAMING SECTOR

At the heart of growing brands in ultra-competitive and crowded markets is an understanding of how people make choices:

- How people make decisions
- How people **think about brands**—as a network of memory, feelings, experiences, images, associations, colors, sounds, etc.
- How people are influenced
 - **Memory salience**—all existing aspects of a brand's mental network
 - **Attention salience**—cues and stimuli capturing our attention at any touchpoint

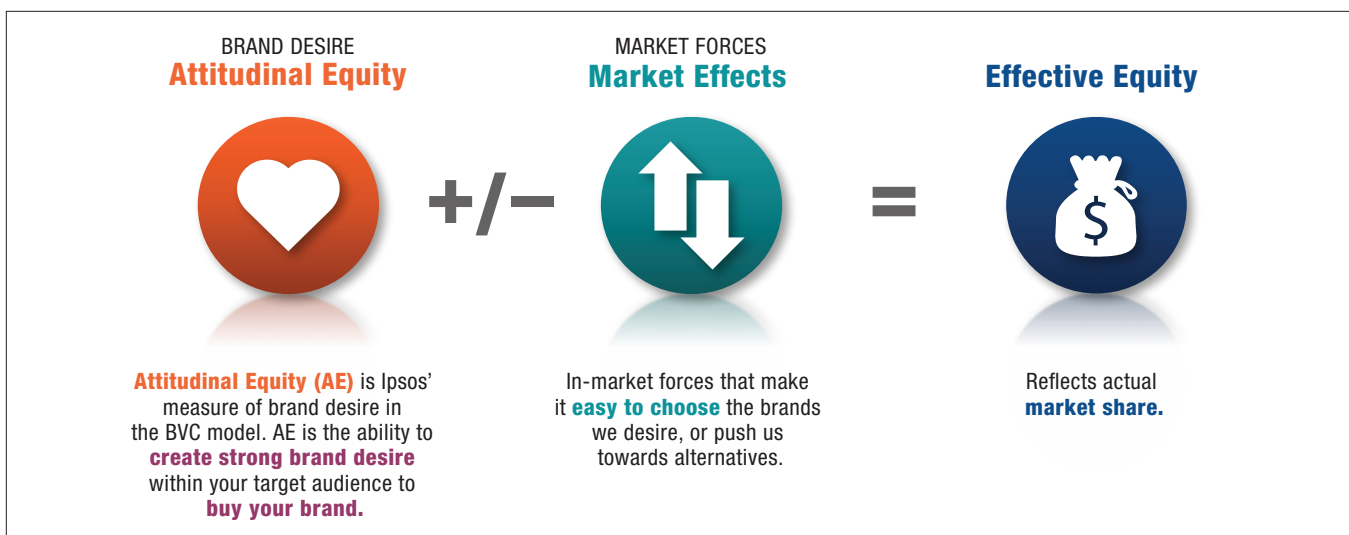
Ipsos' **Brand Value Creator (BVC)** consists of a holistic set of brand metrics that accurately predict what people will buy. BVC is a **validated model** tied to real business outcomes.



With BVC, we are able to:

- Properly reflect how **consumers make decisions**, driven by use and experience, not just by communications
- Measure the **share of brand desire/affinity** for the brands in your portfolio
- Identify the **market effects (i.e. barriers)** which impact your brands' equity, positively or negatively
- Identify the **drivers of equity** for your brands
- Diagnose strengths and weaknesses in your brands
- **Recommend strategies** for improving your brands' equity over time

The model is brilliantly simple in concept and just as simple to execute in survey research.



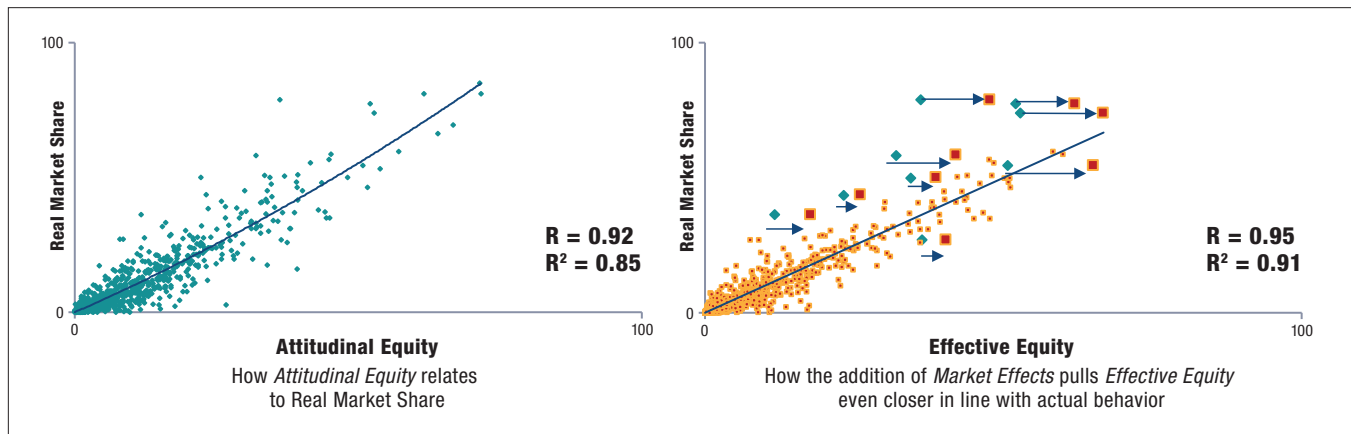
GAME CHANGERS



BVC has achieved the highest predictive accuracy of any validated brand model in the marketing research industry.

To date, we have seen:

- Over 25,000 BVC model runs since its creation in 2006;
- Over 16 Million BVC interviews (surveys) collected;
- Studies conducted in over 100 countries in 150+ categories;
- Validation in 30 categories, across 46 countries, for more than 1,350 brands.



Uniquely adapted to the Lottery and Gambling sector, BVC can:

- Help Lottery brand and product managers optimize their portfolio marketing
- Pinpoint which brands need the most attention and where the opportunities are
- Help gambling industry managers understand how their products/properties stack up against their competition
- Give marketers the insight and direction needed to grow their brands' market share over time

Contact Us

Ipsos in North America has a solid team solely dedicated to research in the Lottery and Gaming sector.

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Visit our website to view upcoming events, read articles, press releases and more at:

<https://www.ipsos.com/en-ca/solutions/marketing/lottery-gaming-research>



GAME CHANGERS