

# IPSOS GAMING MONITOR

The landscape of betting and gambling is rapidly changing.

Are you ready?



IGM  
SYNDICATED



## INSIGHTS WITHOUT BORDERS

Regulation is spreading.



How and where will future growth happen in Canada?



How will the U.S. market change as more states legalize sports betting?

### Online Sports Betting Poised for Growth



PROVINCIALY REGULATED  
SPORTS BETTORS

% pop

~40%



LEGAL SPORTS BETTING  
SPORTS BETTORS

~50%



## COMPETITIVE ADVANTAGE

Gamblers use **four different sites** or apps on average.

- How do consumers choose which one to put their money on?
- How do gaming sites rank on key attributes that drive choice?
- Who are the brand leaders and what are their strengths?



## PUBLIC PERCEPTIONS

Most consumers don't know what sites are legal vs. grey market.

- What is the general public sentiment toward online betting & advertising?
- How are perceptions evolving?
- What are the **player health** implications?

## Quarterly Insights

The most comprehensive gaming market study in North America.

Covering offline and online betting, we answer every marketer's burning questions, from total audience size to player perceptions, brand image, and competitive positioning.

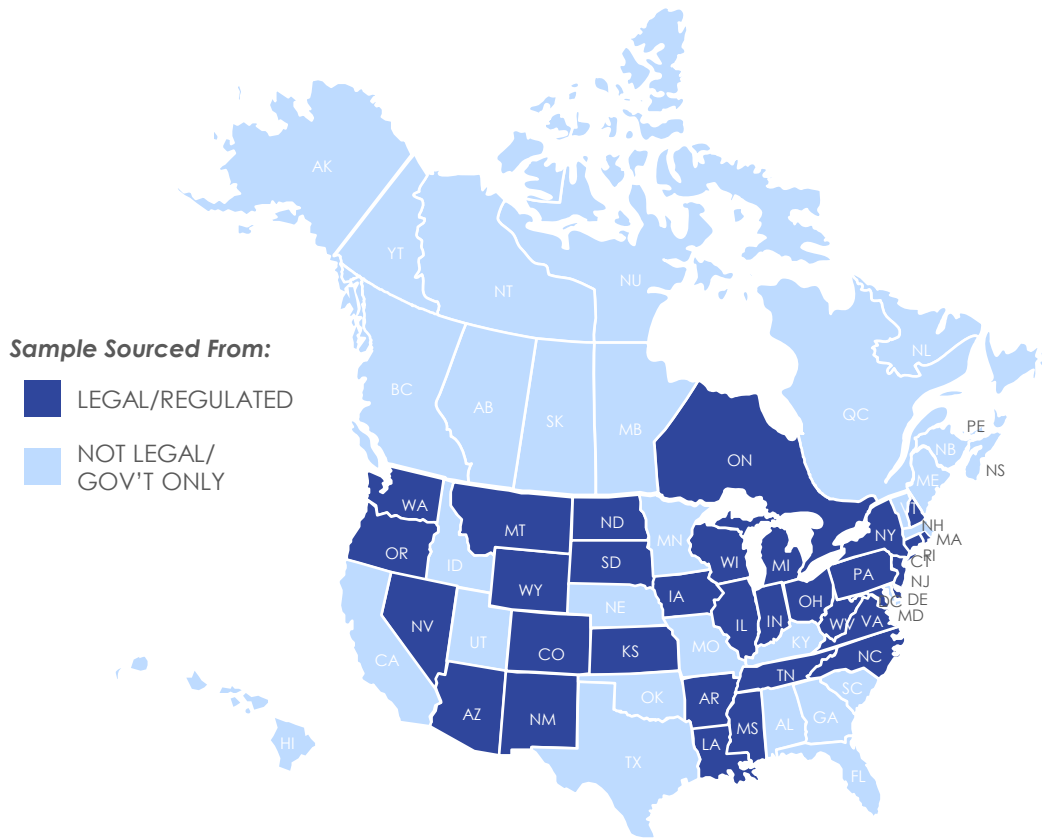
Insights released quarterly.

## SUBSCRIBE NOW!

for a chance to add your custom questions.

## NORTH AMERICAN COVERAGE

As legalization spreads across North America, we offer coverage across all markets, including currently legal and potentially legal in the future.



## INSIGHTS

- **Market sizing** – Online and offline
- **Share-of-wallet** – Brand equity & positioning
- **Feature analysis** – Sports betting in-depth
- **Marketing insights** – Performance and drivers analysis
- **Public sentiment** – Awareness, acceptance, confidence, player health

## CUSTOMIZE (Ask us for pricing)

Include **custom survey questions** exclusive to your brand.

Request a **boost/top-up sample** if you need additional surveys in a region or among a demographic of interest.

# 20,000

## Annual Sample

Cut & reported quarterly

### Where It's Legal/Regulated

N=4,000 Ontario

N=4,000 U.S. Legal Sports Betting States

### Where It's Not Yet Legal/Gov't Only

N=4,000 Rest of Canada

N=4,000 U.S. States Without Legal Sports Betting

Plus

- Quarterly top-up sample of online gamblers for more robust analysis

**Subscriptions cover a full year – four quarterly reports:**

Flexible subscription options

- Subscribe to one country only
- Subscribe to both countries
- Custom data analysis

For more information contact:

**Scott Morasch**

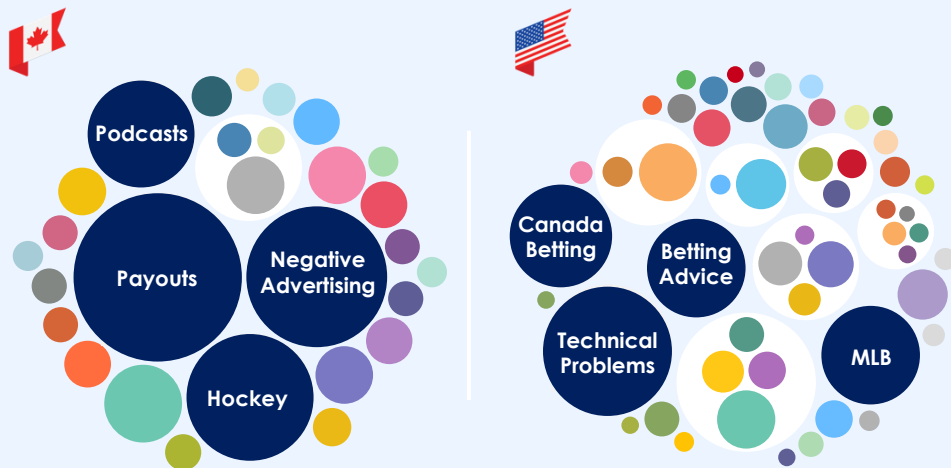
Senior Vice President

778.373.5004

scott.morasch@ipsos.com

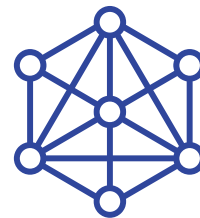
### TRACK WHAT PEOPLE ARE TALKING ABOUT

Use Social Intelligence Analytics (SIA) to know what people are talking about. Uncover key topics, trends, and hidden opportunities.



#### Social Intelligence Analytics (SIA)

Access Ipsos' market-leading Social Media Intelligence Suite with the widest coverage of data in the world.



**Analyses customized to your needs**

Contact us for pricing

### DEEPER LEARNING

Under the data and trends are real people. Their stories add meaning and shed light on the future of online betting. Examples of what we heard about choosing a site or app:

'I joined sites that offered me an incentive first and foremost such as a betting bonus or free chips to play.'

**-Jeffrey**

'I made a comparison between different gaming sites and decided to stay with the app that is easier to use.'

**-Tom**

'I saw ads for OLG first and with them being government connected, it felt safer than an overseas place that could go under.'

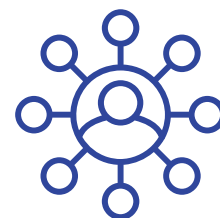
**-Phil**

'I decided based on legitimate and trustworthiness of the site, based on reviews and other sources to confirm the validity of the site.'

**-Patricia**

#### Qualitative Player Community

Use Ipsos' Conversations Community to reach pre-screened online gamblers for custom deep dives.



**Community discussions tailored to your needs**

Contact us for pricing