



# Gaming X,Y,Z Syndicated Study 2017 Canada

Insights on Technology Use, Social Media, and Everything Lottery & Gambling Related Among Three Critical Demographic Groups

The Gaming with X,Y,Z Syndicated study will be the stand alone authority on comparing three distinct generation groups (Gen X, Y, & Z) across a number of gaming and lottery and non-gaming attitudinal and behavioral metrics. It will help lottery and gaming marketers better understand the relevant differences for product and marketing planning efforts. The study will focus on answering the following questions and more:

- Types of gaming products most appealing?
- Barriers to participation in lottery/gaming?
- Play behaviors and preferences for lottery?  
Casinos? Online gaming? Social gaming?  
Fantasy sports? esports?
- What differences exist between Gen X, Y, and Z?

For many years one of the biggest challenges facing gaming entities was how to grow market share. In recent years, it has become more clear that the challenge may be shifting to 'how to maintain share.' In light of the changing gaming and entertainment landscape, the increased popularity of digital and e-commerce, and the rapid rise of the omni-channel consumer, gaming entities are facing significant challenges in retaining market share as consumers age through demographic cohorts.

The lottery and gaming sector is also changing dramatically, with the implementation of online distribution across a number of Canadian jurisdictions, and a consideration to develop this channel.

Convergence of gambling, social gaming, lottery, fantasy sports, and esports, and the impact of this convergence on entertainment spending, is resulting in a murkier competitive landscape for gaming entities.

As marketers grapple with these issues, it becomes clear that an approach to at least maintaining market share is to focus on consumer groups that have the potential to become loyal customers and who are already immersed digitally.

For most, this means a focus on consumers that mostly belong within the Generation Y and Z demographic groups—aka Millennials.

Gaining an understanding of these two groups as an existing and potential consumer base takes on even greater importance given the ongoing presence of competitive social gaming offerings, the continued growth of fantasy sports, and the emergence of esports (a favorite among Generation Z). Compared with Generation X, arguably the core customers of traditional lotteries and gaming entities, there are vast attitudinal, shopping behavior, entertainment and media consumption, and communication differences. And guess what? Traditional lotteries and gaming entities still offer a product and service tailored to Generation X.

## Topic Areas

Sample topic areas for the study include:

- Lottery play (online/traditional) channels
- Key lottery trends
- Casinos and social gambling
- Internet and mobile gaming participation, spending and top websites
- Fantasy sports and esports participation
- Technology usage and trends, including applications for gaming, digital currency, and social gaming

## Methodology

Device agnostic web and mobile-based Internet Study: A 25-minute survey will be conducted using Ipsos' proprietary online panel in Canada.

n=1200 surveys completed in Canada (n=400 per cohort)  
(A sample size of n=1,200 provides a margin of error of  $\pm 2.8\%$ )

Age definitions for Generation X, Y, & Z vary somewhat depending on the source. For the purpose of this study, Ipsos defines Gen X as 37–52, Gen Y as 25–36, and Gen Z as 18–24 years old.

## Value-Add Options (to be priced separately on request)

1. Clients have the option to purchase booster samples if they subscribe prior to fielding. Booster samples can be collected on any desired criteria and will be priced on an ad-hoc basis, provided they are feasible to obtain.
2. In-depth qualitative comparing each demographic group with digital Eye Journal. Eye Journal offers a digital ethnography and is built on the premise of blogging, coupled with creative activities to bring the participant to life. There is often a difference between what people say they do and what they actually do. Eye Journal is designed to get under the skin and explore these differences to identify the insights that define the participant (player). Activities could include a trip to a lottery retailer or casino with photos (where possible) of the trip and a summary of the experience. Specific objectives of Eye Journal to be customized to each Eye Journal subscriber.

## Timing

Please note that this timeline is tentative and subject to change, primarily pending client response. Client commitments take place in October with the final report available in February or March.

## Cost

Deliverable	Cost
Canada Report and Data Tables	\$8,500 CDN
Booster Sample	Please contact Ipsos for pricing
Additional Crosstabs	Please contact Ipsos for pricing
Eye Journal	Please contact Ipsos for pricing

## About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 88 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,782.7 million in 2016.

## Contact Us

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

To learn more about this study, please contact:

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