



# Emerging Market Syndicated Study 2010: "An Overview of the Gaming Landscape"



## Background and Objectives

The Emerging Market is defined as young adults in the general population aged 18–34. How are they different than other age cohorts? They are characterized by their high disposable income, as they have yet to make many debt-incurring "big life" purchases, as well as their strong desire to connect and stay connected with their peers.

Due to their passion for consumer goods, the Emerging Market has become one of the most sought after market segments by several industries in recent years. As such, there is an inherent need to develop a solid understanding of this particular group of individuals in order to maximize marketing dollars.

Through a syndicated shared-cost study, Ipsos Reid is able to provide marketers and decision makers with a cost-effective way of obtaining relevant information on the Emerging Market.

In its third year of subscription, the *Emerging Market Syndicated Study 2010* will continue to follow consumer and lifestyle trends, media habits, technology usage, social networking behavior, etc. However, the focus in 2010 will concentrate largely on the behaviors and attitudes of the Emerging Market related to all aspects of "gaming."

More specifically, in 2010 Ipsos will continue to track patterns and trends in the following areas (tracking since 2008):

- Lottery awareness and participation
- Motivations for playing lottery games
- Barriers to play
- Prize preferences
- Media and shopping habits
- Leisure activities
- Environmental choices
- Use of technology products
- Internet usage and behavior
- Social Networking

## What's New for 2010?

Ipsos will add in new modules in 2010 to explore the following in-depth:

- **Casino Patronage and Behavior**
  - Including: motivations, perceptions and attitudes, loyalty, play patterns and frequency, spend, types of games played, and barriers to entrance and play
- **Internet Gaming Participation and Behavior**
  - Including: motivations, perceptions and attitudes, playing for real money vs. playing for fun, number of sites played at, frequency of play and spend, loyalty to specific sites, types of games played, and barriers to play

## • Other Gaming

- Including: console gaming, computer gaming, sports pools, multi-player gaming, racetrack betting, etc.

## Methodology

### Web-based Internet Study:

A 25 minute survey will be conducted with respondents on the Internet using Ipsos' proprietary online panel (both in the U.S. and in Canada).

### United States:

Total Respondents (n=1,000)

### Canada:

Total Respondents (n=1,000)

*A sample size of n=1,000 provides a margin of error of ±3.1%, 19 times out of 20.*

The sample will be representative of all Americans (in the U.S. study), and all Canadians (in the Canadian study) for that particular age category.

Clients have the ability to purchase booster sample if they subscribe prior to project field.

## Timing (tentative, pending client response)

|                       |                  |
|-----------------------|------------------|
| Questionnaire Design: | Late March 2010  |
| Fielding:             | Early April 2010 |
| Data Analysis:        | May 2010         |
| Report Writing:       | May/June 2010    |
| Report Available:     | June 2010        |





### Deliverables

We will provide the following deliverables:

- Detailed tables with essential cross-tabs; and
- A detailed 60 page presentation report in PowerPoint format

### Cost

| Deliverable                                       | Cost        |
|---|-------------|
| US Report/Tables/Presentation                     | \$5,000 USD |
| Canadian Report/Tables/Presentation               | \$6,000 CDN |
| Booster Sample in a State or Province of Interest | TBD*        |
| Additional Crosstabs                              | \$500**     |

\*Please contact an Ipsos Reid representative for more information.

\*\*The cost for additional cross tabs will vary.

**Note:** This project assumes a minimum number of subscribers and will not proceed without attaining that minimum.

### Our Research Team

The most senior members in this sector within Ipsos Reid will design and manage all aspects of this project. This team includes:

**Paul Lauzon** is Senior Vice-President & Managing Director of Ipsos Reid's Gaming and Lottery Division. Paul is responsible for a variety of customized quantitative research programs for various online gaming entities and states. Paul regularly presents at various North American and International conferences on gaming and lotteries.

**Samantha McAra** is a Senior Research Manager with Ipsos Reid's Gaming and Lottery Division. Samantha currently works on ad-hoc projects and tracking studies for a number of state and provincial lotteries. She is also an experienced focus group moderator.

**Kim McKay** is a Research Manager with Ipsos Reid's Gaming and Lottery Division. Kim has worked with a number of different state lotteries on various custom research and tracking studies.

Ipsos Reid is the second largest survey based Research Company in the world, and has a seven member team solely dedicated to the Gaming and Lottery sector. If you have any questions on how to grow your gaming business, please contact us.

### Contact Information

For any other information about this study or any other research needs please contact:

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