

# ONTARIO BINGO DEVELOPMENT FUND

## MARKET RESEARCH TOOL KIT

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## Background

In 2009, OBDF conducted a number of important and relevant research projects:

Pollara Phase 1: Understanding Bingo in the Broader Ontario Landscape (January 2009)

Pollara Phase 2: In-Depth Bingo Market Study Among Current, Lapsed, and Potential Bingo Players (May 2009)

Pollara Phase 3: Assessing the Cross-Border Bingo Market (May 2009)

Ipsos Camelford Graham: Bingo Brand Identity (August 2009)

PMB Analysis: Target Group Media Habits (August 2009)

## Purpose of the Tool Kit

Our goal is to try and help you, the bingo operator and Hall Charity Association, translate the research into usable *implications and actionable marketing strategies*. We want to help you transform the “what we know” into “how to apply what we know.”

To help you develop practical applications, we’ve devised a tool kit filled with information about current and potential players, and have provided ideas that will help you develop and implement your marketing plans.

Your tool kit consists of the following elements:

- A portrait of current and potential players
- Motivators for current and potential players
- The most highly rated game/facility enhancements by current and potential players
- Strategic framework or brand essence recommendations such as attributes, benefits, values and personality that are essential for the development of the Gametime Bingo brand

# The Target Market: Current & Potential Players

## CURRENT PLAYERS

**Current bingo players represent 5% of the Ontario adult population.** They are defined as those who have played bingo in a bingo facility (vs. online or charity one-off) in the past year and intend to play again in the future.

According to our research:

- About 15% of current players play bingo at least a few times per week.
- 23% play a few times per month
- 44% play a few times per year
- 16% play less often
- 50% of have been playing for 10+ years
- 70% travel less than 10km to play bingo
- 67% have recommended bingo to family and friends

# The Target Market: Current & Potential Players

## POTENTIAL PLAYERS

**Potential bingo players represent about 35% of the Ontario adult population.** They are defined as people who have played at some point in the past and are open to playing again in the future or as those who have not played in the past, but are open to playing in the future in a bingo facility (vs. online or charity one-off).

According to our research:

- 4% of potential bingo players have played in the past
- 31% have never played in a bingo centre
- 20% of potential players **were born outside Canada**

## The Target Market

### PERCEPTION:

**Bingo is a just a game for superstitious old ladies.**

### FACTS:

Demographically, **current and potential players share similar characteristics** in terms of gender, age, education and attitudes towards life. Canadian and U.S. players also share similar profiles.

The majority of players are anything but superstitious old ladies.

# The Target Market

## Age and Gender

While bingo is played by all ages and genders, **approximately 70% of current and potential players are women**, and 60% are married or common law.

63% of current players are between the ages of 25-54; this same age range represents 65% of potential players.

Only 22% of current players are in the 55 – 64 age range, and this age group represents the least number of potential players.

## Employment and Household Income

Almost **half of current and potential players are employed full or part-time**, with the majority full time. Only 17% of both groups are retired and 10% are homemakers.

Their household income covers a broad range: 60% of both groups have average annual household incomes between \$25 – 100K. Current and potential players appear to skew slightly below the median Ontario household income of \$69K.



# The Target Market

## Education

There is a **slight difference in the educational levels of current vs. potential players**, with the latter group reporting higher educational attainment.

Approximately 37% of both current and potential players have attended/completed community college. This is the largest educational representation.

40% of the current player base has greater representation in the attended/completed high school category vs. 20% for university.

34% of potential players have attended/completed high school and 28% university, percentages that are very similar to the Ontario population at large.

# The Target Market

## Attitudes

**Both current and potential players are socially active and are not risk adverse.** They agreed with the following statements on a high and relatively equal level:

- Believe it's important to get out and meet others in social situations
- Enjoy playing social games with friends
- I am comfortable at large gatherings or events
- Enjoy taking on new challenges
- Believe that tradition is relatively important
- Like games of chance
- Like to try new leisure activities (slightly higher among potential players)
- Relatively satisfied with what I've achieved in life (slightly higher among current players)
- Most importantly among both groups... **I do not perceive myself as overly superstitious**

# The Target Market

## Gaming Activities

Current and potential players also differ in participation of other gaming activities, with current players reporting higher participation in all forms of gaming.

	Current Players	Potential Players
Lottery Tickets	91%	82%
Scratch Tickets	86%	75%
Slots	45%	28%
Internet Bingo	34%	16%
Casino Table Games	16%	10%
Pro-Line	16%	7%

# The Target Market

## Media Habits

### **Current and potential bingo players share similar media habits:**

More than **80% watch television every day**. They are above average TV viewers and find the following programs particularly appealing:

- Current Affairs (ET Canada, Breakfast Television) & Talk Shows (Oprah, Ellen)
- Soap Operas, Dramas, & Cooking Shows

Over **60% listen to the radio every day** and nearly 40% listen to the radio more than 12 hours a week. They prefer the following formats:

- Rock – modern and classic
- Country – traditional and new/crossover
- Oldies & Hip Hop (latter tends to be more urban)

Less than 40% are readers of daily newspapers, but **almost 60% read community newspapers**.

Most enjoy reading weekly magazines, but the majority are American (e.g. *People*).

Over 50% are online every day, but are very selective in their surfing.

# The Target Market

## Intent to Play Bingo

**88% of current players and 65% of potential players** indicate that they are definitely/very/somewhat **likely to play within the next 6 months.**

Those from 25-44 years of age are most likely to play.

The annual household income of those committed to playing again is \$25-75K.

Those who have attended/completed high school and community college are more inclined to play.

Current and potential players living in urban, suburban and small towns are more committed to playing than those living in rural areas or Northern Ontario.

Residents of/around the GTA (with exception of those living in the western region of the 905 area code), Eastern and Southwestern Ontario players are all more likely to play than the average Ontarian.

## Target Market Action Plan

- Gear your marketing efforts to the **primary target of women from 25 – 54** years of age with some post-secondary education. They presumably have some disposable income because they are employed full or part-time, with household incomes from \$25 – 100K.
- **Ensure visual imagery** in marketing materials **reflects and reassures the target audience**. Players, especially potential players, need to feel comfortable with the notion that bingo is for “people like me, and not for superstitious old ladies.”
- **Go local with media buys**. Community newspapers or local radio stations are the most successful and cost-effective way to reach your target market, especially considering that 70% of current players travel less than 10km to play bingo. Locally-distributed Flyers can also be very cost-effective.

## Target Market Action Plan

- **Develop a promotional program like “Bring a Buddy to Bingo.”** Promotions like these are generally very successful because they tap into the potential market. Almost half of all current players were introduced to the game by friends or family. This tradition of **recommending friends should be encouraged at every opportunity.**
- If you have a **high concentration of new Canadians in your area, develop a tactical campaign for beginners** in one or two easily reached markets. Use ethnic newspapers for low-cost advertising.

## Motivators and Barriers: Why Do People Play Bingo?

### PERCEPTION:

**Bingo players are losers. They have nothing better to do than sit and spend their money in a smoke-filled hall.**

### FACTS:

Most current and potential players are as interested in socializing and having fun as spending money to win prizes.



## Motivators and Barriers: Why Do People Play Bingo?

### First-time Motivators

**The social experience, having fun and a chance to win prizes are the top first-time motivators** for bingo players in Ontario and for U.S. players playing in Ontario.

49% of Ontario players and 41% of U.S. players were motivated to join friends or family who were going to play bingo.

15% of Ontario players and 11% of U.S. players thought bingo might be fun.

17% of Ontario players were motivated by the prizes. Only 2% said “bingo was something to do.”

9% of U.S. players came to bingo because of the prizes, while 9% said they wanted something to do.

# Motivators and Barriers: Why Do People Play Bingo?

## Current Player Motivators

**Current players also consider bingo a social experience** and nearly half of them began playing because of family and friends. They are also motivated by the opportunity to win prizes and have fun.

33% are motivated by the social aspect of bingo, although it's generally rated higher by women and those living in non-rural areas.

25% of current players think bingo's fun and exciting.

25% play because of the prizes/jackpots.

67% have recommended bingo and have been joined by friends and family.

# Motivators and Barriers: Why Do People Play Bingo?

## Social Motivators

Current and potential players also identify a number of parallel social motivators:

Bingo is an **opportunity to socialize:**

- A night out with friends/partners
- Time to chat, either quietly during or between games

It's an **adult activity:**

- Time when I don't have to be mom
- Having fun in the company of other adults

Bingo is a way to **get away from it all:**

- Escape or "me time" – a treat or reward for myself
- Leave behind the stress and pressures of everyday life

You can enjoy **others having a good time:**

- People watching is entertaining and part of the fun
- You get caught up in the excitement of others

# Motivators and Barriers: Why Do People Play Bingo?

## Emotional Motivators

Both current and potential players cite a **number of positive emotions that they associate with bingo:**

### Eagerness

- The anticipation of being part of the game
- The possibility of winning
- The anticipation of waiting for the last number I need

### Happiness

- Win or lose, bingo is a good night out

### Jealousy/Envy (in a positive way)

- “I wish I could be one of the people who wins”

### Safe Choice

- Women see a night out at bingo as something that they can do on their own

# Motivators and Barriers: Why Do People Play Bingo?

## Prizes as Motivator

**25% percent of current players** say that the opportunity to **win money is a key reason they continue playing bingo.**

Current players already have a good understanding of the sizable jackpots that can be won.

They are also very conscious that the opportunity to win occurs multiple times during a session.

These multiple opportunities create strong and mostly positive emotional reactions often described as like “being on a roller coaster.”

# Motivators and Barriers: Why Do People Play Bingo?

## Charities as Motivator

The **charitable component of bingo is not, in itself, a primary motivator**. However, bingo is the only gaming activity where monies raised directly support local charities and this is **viewed as a very positive element by both current and potential players**.

Even though it's not a primary motivator, support of local charities can be **very compelling in the decision making process**:

- 68% of current players say that the fact proceeds are donated to local charities makes them more likely to play
- 71% of potential players indicate donations to local charities make them more likely to play

Monies raised for local charities are a consolation or rationalization if one doesn't win. It's a "feel good" bonus!

The "wow factor" among current and potential players regarding the amount of money bingo raises for local charities contributes to a more positive image of the game.

# Motivators and Barriers: Why Do People Play Bingo?

## Barriers for Potential Players

While **potential players** are open to the idea of bingo, many **need reassurance to overcome the following misconceptions.**

- I won't be spending time with "people like me"
- I'll be bored – the game isn't really that exciting
- I won't be able to keep up with the game and I'll feel humiliated if I need help
- I won't be able to talk and I'll be "shushed" by other people
- I'll be spending my time in a smoky, drab environment
- Bingo won't be good use my of entertainment dollar

## Motivator Action Plan

- Bingo is viewed as a social game by both current and potential players. Use every opportunity to **reinforce the social/ fun aspects of bingo and tap into the positive emotions surrounding the game** – eagerness, happiness and entertainment.
- Going with friends/socializing is a key motivator for bingo. **Programs that reward current players for bringing a friend have terrific merit** and are a great way to build your business.
- While the opportunity to win money is a compelling motivator, you should ensure it isn't the only promise. Over-emphasis on winning can lead to strong feelings of disappointment – “I didn't get anything for my entertainment dollar.” **Centres that promise a social/fun experience rather than just winning run less risk of disappointing and losing customers, particularly potential players.**
- **The charitable component** is a very positive part of the bingo brand. Every opportunity to **reinforce your good works** should be pursued – at your centre or through public relations directed to the larger community. It can be a very important part of the decision making process among potential players who are “sitting on the fence.”



## Motivator Action Plan

- Although bingo is perceived as a simple game the **intimidation/fear factor** is very real. To overcome it, **train your staff to watch for and help any players who appear to be new to the game.** It can be as simple as helping a player identify which sheet/game is next or by offering a no-money practice game prior to the start of a session.
- Above all, **ensure promises made in your marketing/advertising efforts can be and are delivered by the experience in your centre.** If the promise is the opportunity to socialize and have fun, make sure the experience is social and fun.

## Game & Facility Enhancements

### PERCEPTION:

Bingo is the **same old thing**. It moves too slowly and **never changes**.

### FACTS:

We recognize that **the decision to introduce some game enhancements** such as electronic bingo and slot machines **is beyond the scope of a local bingo centre**. However, a sizable number of current and potential players indicated they would welcome some game enhancements wherever possible.

It is worth noting that when lapsed players were asked why they no longer play bingo, 45% indicated that they just “weren’t interested.” In other words, they no longer found bingo entertaining, lending support and credibility to some kind of game enhancements.

## Game & Facility Enhancements

### Electronic Bingo

Most players expressed a **positive attitude** towards electronic bingo.

**73% of women from 18-34 said they'd like to play electronic bingo** and represent the largest fan base.

70% of potential players expressed an interest in electronic bingo.

69% of large city dwellers and 68% of those in smaller cities were interested.

### Other Gaming Activities

Among all groups, adding other forms of gaming to the bingo experience had some merit, although the addition of slot machines was approved or rejected almost equally.

The majority of both current and potential players would welcome the introduction of **raffle tickets**. Similar to electronic bingo, **women 18-34 are the biggest fans**.

## Game & Facility Enhancements

### Other Gaming Activities (con't)

74% of current players and 64% of women from 35-54 endorsed **break-open tickets** as part of the bingo experience.

Potential players were less enthusiastic about break-open tickets, but they were not against them either, which could indicate a lack of awareness.

Relatively equal numbers endorse and reject the notion of **adding slot machines** to the bingo experience:

- 57% of women 18-34 endorsed the addition of slot machines
- 52% of potential players endorsed them
- 52% of players in large cities, and 53% of those in suburban areas approved of slot machines

**51% of current players** want **bingo as the only game** played in bingo centres.

## Game & Facility Enhancements

### Updating the Décor

**Updating the décor** was the most popular item on the facility enhancement wish list, with **80+% of women, current players and potential players endorsing it.**

91% of women 18-34 felt most strongly about updating the décor.

Northern Ontario and rural residents are the only groups for which updated décor would not make as much of a difference in terms of their motivation to play bingo.

The following are especially appealing to both current and potential players:

- A comfortable, bright environment
- Comfortable chairs
- Proper lighting
- Fresh, modern look and feel
- A physical layout that will enhance the sense of fun, excitement, friendliness and social interaction

## Game & Facility Enhancements

### Addition of a Restaurant/Pub

The addition of a restaurant/pub to a bingo facility was **highly appealing to both current and potential players.**

87% of women from 18-34 found the addition of a restaurant/pub to the facility particularly appealing. 69% of potential players also found it appealing.

71% of those living in large urban or suburban areas liked the idea of a restaurant/pub.

As with décor, Northern Ontario residents were more likely to say the addition of a restaurant/pub would not influence their motivation to play.

## Game & Facility Enhancements

### Liquor License within Bingo Facilities

The prospect of liquor licenses within bingo facilities was equally divided with approximately **50% for and 50% against this initiative.**

72% of women from 18-34 endorsed a bingo facility liquor license – the only group strongly in favour.

46% of potential players were favourably disposed to the idea.

Only 38% of current players endorsed a liquor license.

## Game & Facility Enhancement Action Plan

- If your bingo centre attracts **women from 18-34 and is in a city/ suburban area**, you have a good opportunity to build your business by **introducing gaming enhancements**.
- If your centre doesn't or cannot attract large numbers of women from 18-34, you should still factor their views into your marketing decisions. The **18-34 group represents the wants/needs of future bingo players**.
- When you're evaluating which game enhancements to introduce, you should try to **strike a balance between the wants and needs of both current and potential players**. ***Please note:** The research did not question current players as to whether games enhancements would make them stop playing or play less. It only questioned whether people would welcome various enhancements.*
- The extent to which your bingo centre is and can be seen as **a comfortable, clean, and smoke-free environment will help diminish the stigma** associated with bingo facilities.
- **Facility renovations can be very effective**, but if you communicate "new and improved" in your marketing and advertising, ensure your facility lives up to its promise.



## Game & Facility Enhancement Action Plan

- **Exterior signage and a welcoming entranceway are critical elements** that are often ignored when a facility is renovating. Current players need to be reminded that you have created an environment that's more comfortable for them. And potential players need to be provided with visual cues that your facility is indeed a welcoming place.
- As with game enhancements, you'll have to **strike a balance between the wants and needs of both current and potential players**. Some enhancements such as proper lighting, comfortable chairs and a modern, welcoming atmosphere are agreeable to everyone.
- Other enhancements such as the introduction of liquor licenses are more polarizing. You'll need to **carefully consider enhancements** like these **based on your current and potential target markets**.

## Summary

- Current bingo players represent 5% of the Ontario adult population, while potential players represent 35%.
- **Demographically, current and potential players share many similar characteristics** in terms of gender, age, education and attitudes towards life. **Current and potential Ontario and U.S. players also share similar demographics.**
- Marketing efforts should be geared to the **primary target of women from 25 – 54** years of age with some post-secondary education.
- Any **visual elements** in your advertising should reflect the primary target group and **reinforce the concept that *bingo is for “people like me.”***
- **Local advertising is the best way to reach your target market.**
- Use every opportunity to tap into the social as well as the emotional elements associated with the game – eagerness, happiness and entertainment.
- Centres that promise a social/fun experience rather than just winning money run less risk of disappointing and losing customers, particularly potential players.

## Summary

- **The intimidation/fear factor is very real in bingo.** Train your staff to watch for and help players who appear to be new to the game. It can be as simple as helping a player identify which sheet/game is next on the program.
- Pursue every opportunity to **reinforce the charitable component** of bingo – at your centre or through public relations directed to the larger community. It can be a very important part of the decision making process among potential players who are “sitting on the fence.”
- While **the decision to introduce some game enhancements** such as electronic bingo and slot machines **is beyond the scope of a local bingo centres, most current and potential players indicated they would welcome some game enhancements.**
- 67% of current players have recommended bingo to family and friends. **Programs such as “Bring a Buddy to Bingo” have terrific merit and are a great way to build your business.**

## Gametime Bingo Brand Essence

The research conducted throughout 2009 formed the basis of the strategic framework for the Gametime Bingo brand. This framework, which is detailed on the following slide, is based on the following elements:

- **Attributes:** What is it? This section will be largely rational in nature.
- **Benefits:** What's in it for me? What is the brand really offering the target?
- **Values:** How does it make me feel? This is an important section because the strongest connections with brands are largely emotionally-based.
- **Personality:** if this brand was a person how would one describe its personality?
- **Essence:** How do we distill this into a few key words? Importantly this is not a slogan – rather it is the nugget, or core, that defines the brand.

## Gametime Bingo Brand Essence

<b>attributes</b>	interactive, involving game; played in social setting; supports local charities; 'soft' gaming (fixed costs/sessions); timeless fun; in-session/in-centre prize winners; bright, well-lit environment
<b>benefits</b>	great break from daily stress & pressures; camaraderie – make new friends & catch up with old ones; money goes to a good cause in my area; controlled spend (time & money); for young & young-at-heart adults who like to 'take a risk'; good odds of winning; 'safe' choice (emotionally and physically)
<b>values</b>	treated/rewarded myself; connected (to other people and community); invigorated by the rush from being 'in the game' (the anticipation...the waiting...the win); comfortable
<b>personality</b>	fun to be around (and, on occasion, a bit of a tease!); big-hearted; trustworthy
<b>essence</b>	sharing, caring fun