

ONTARIO BINGO DEVELOPMENT FUND

Working together to make a difference

Bingo Market Research

Initial Findings and Key Segments

Michael Marzolini, Chairman
Pollara

POLLARA 

Agenda

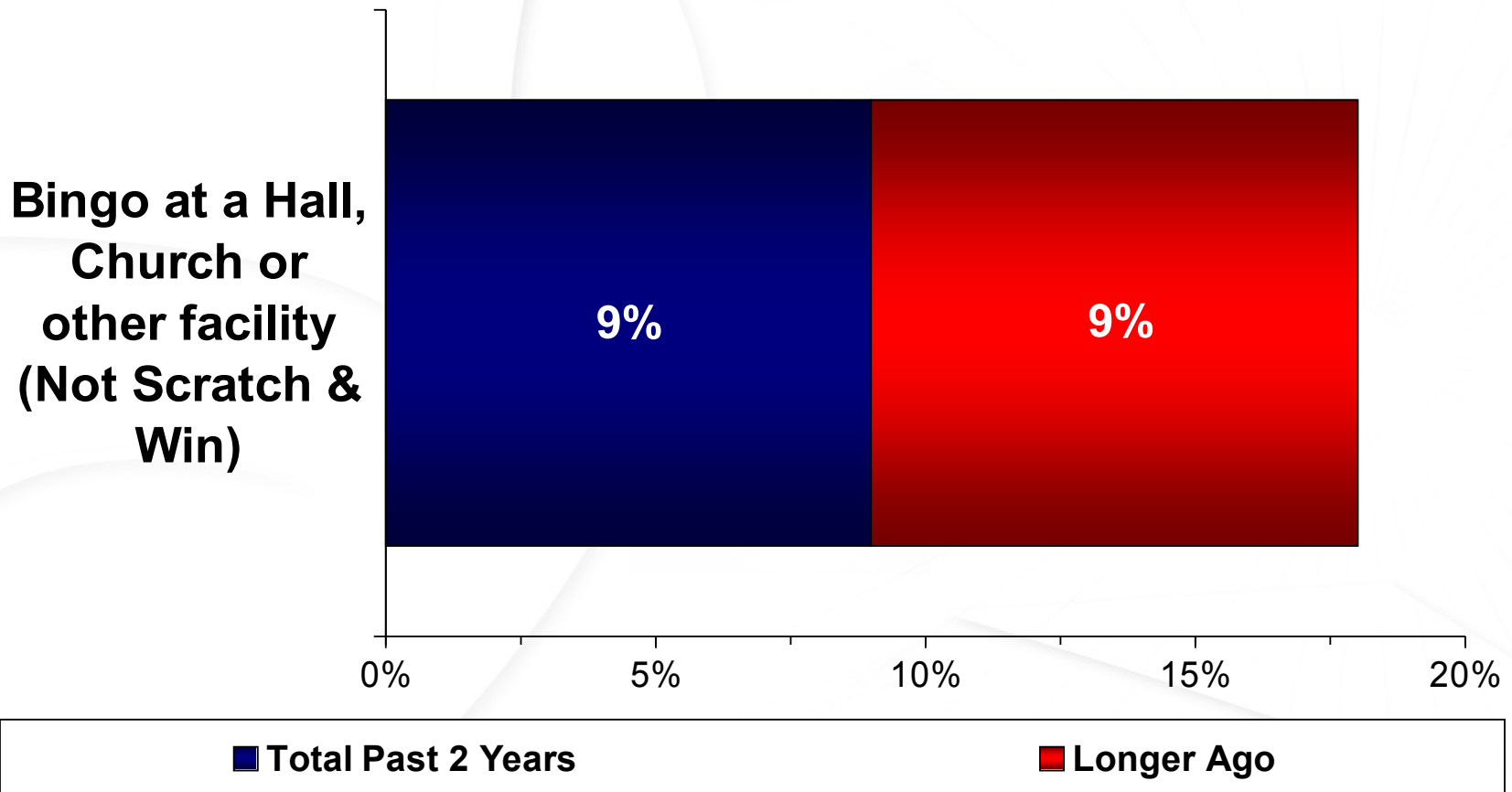
- **Study Background & Methodology**
- **Key Findings**
- **Research Findings :**
 - **Gaming & Bingo Markets**
 - **Attitudes Towards Bingo**
 - **Message & Proposal Testing**
- **Next Steps**



**Gaming & Bingo Markets:
Participation Levels & Segmentation**

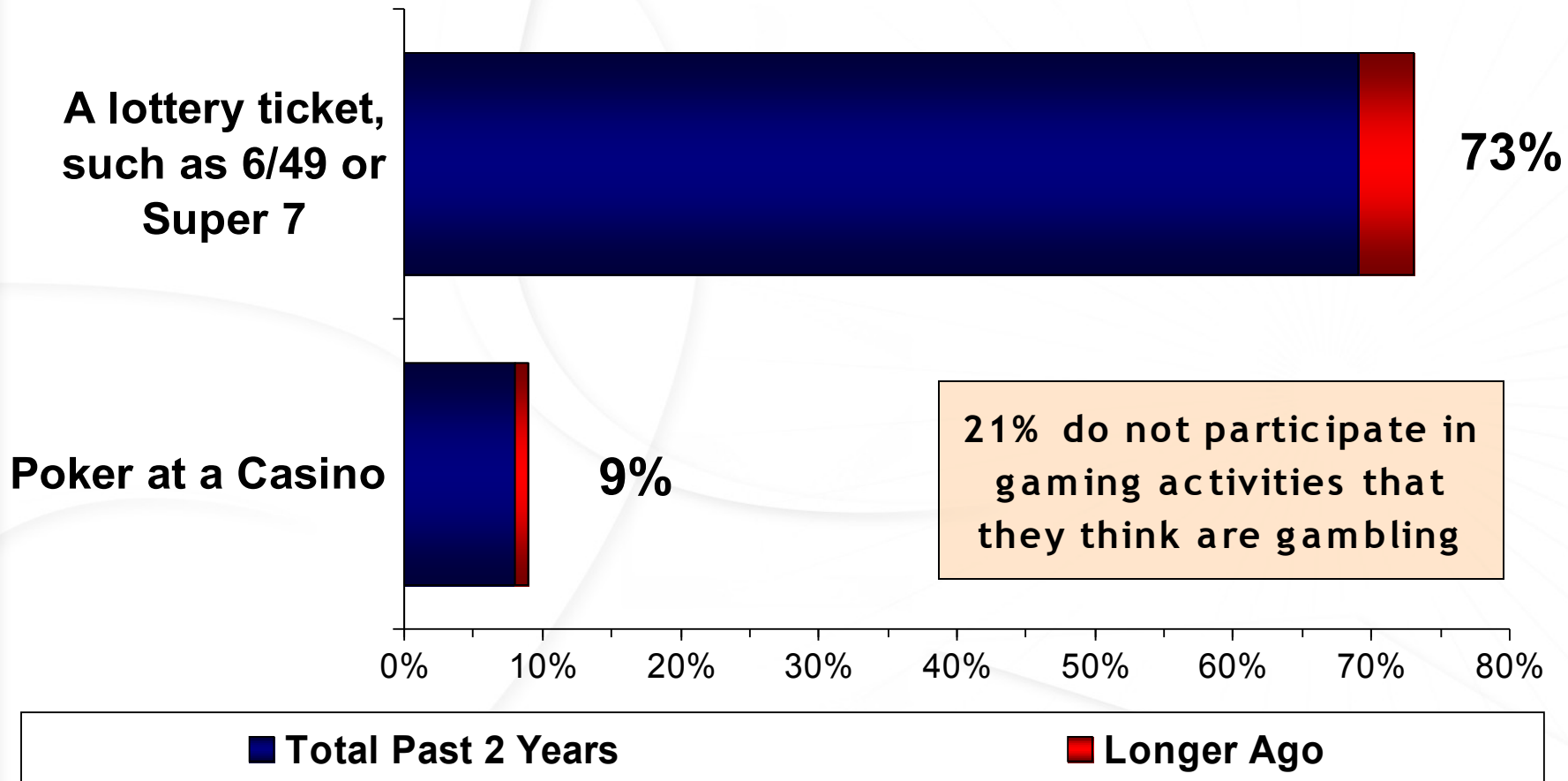
Approximately one-in-five have played bingo at some point in the past

- *Number of participants in bingo increased over holiday season*



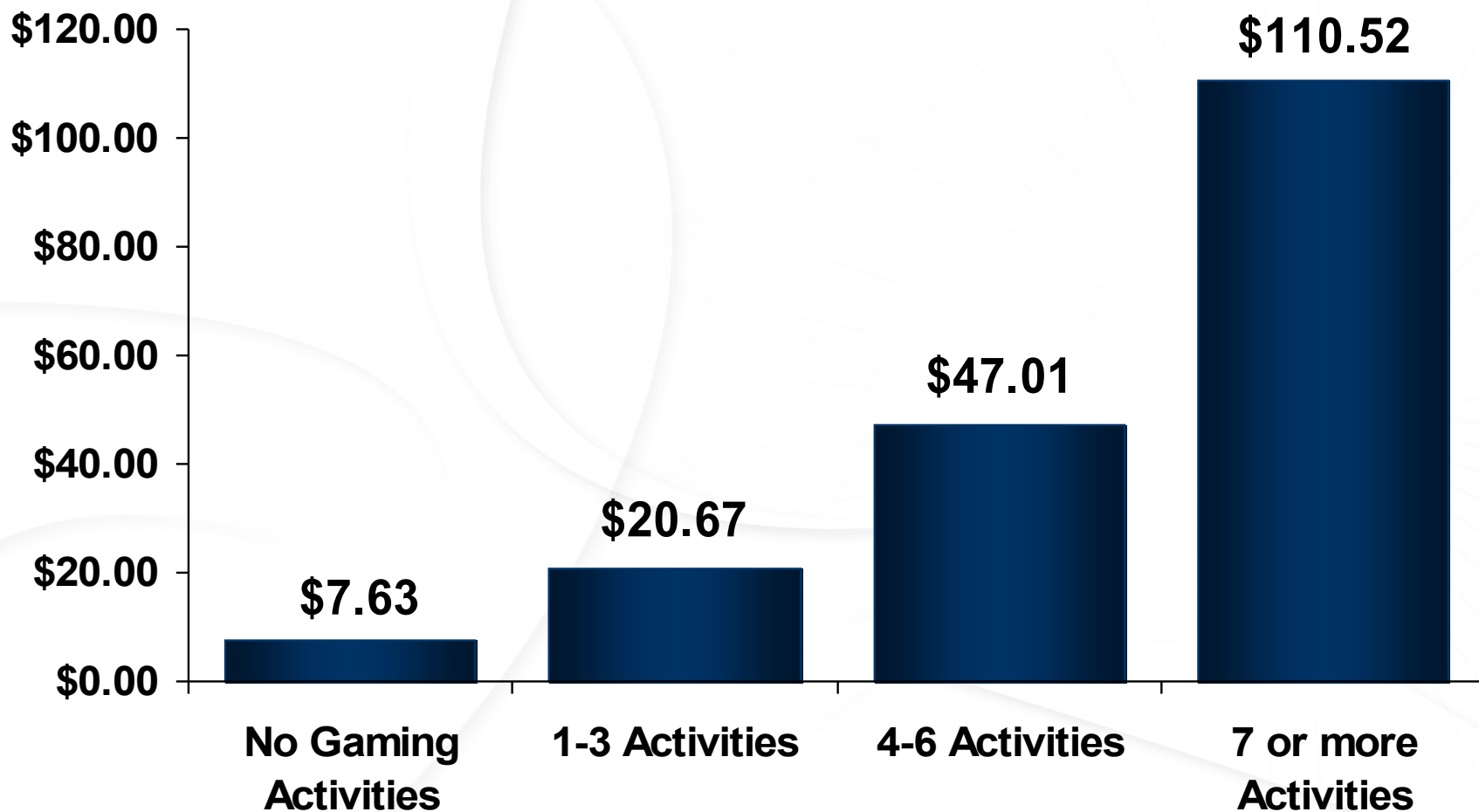
Q4-Q14. You may have already told me, but for each of the following activities, please tell me if you have ever bought or participate in it. [IF YES: And when did you most recently buy it/participate?]

Compare: Three-quarters have purchased lottery tickets; one-in-ten have played poker at a casino



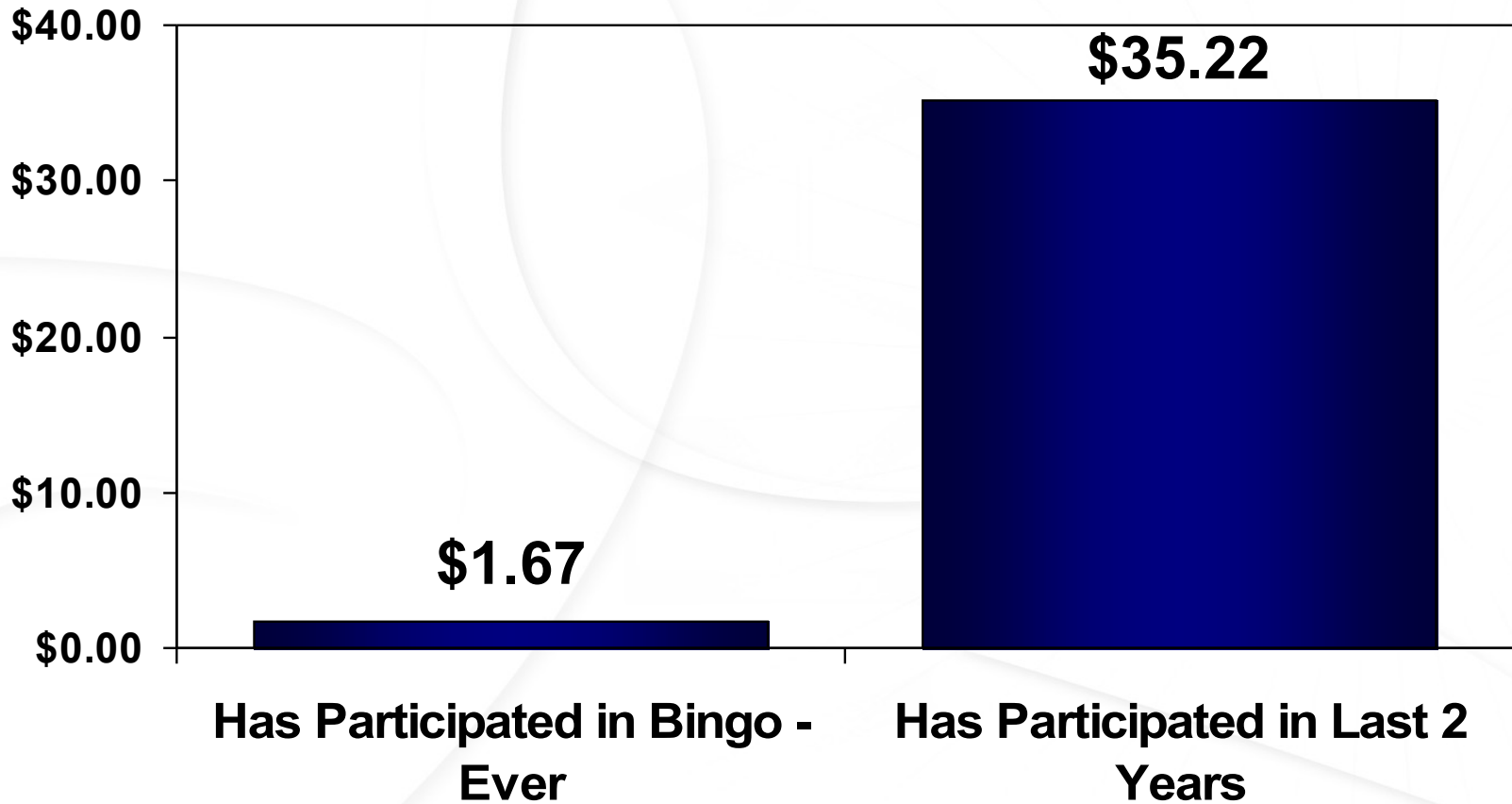
Q4-Q14. You may have already told me, but for each of the following activities, please tell me if you have ever bought or participate in it. [IF YES: And when did you most recently buy it/participate?]

The More they Participate In, the More they Spend



Q17. In a given month, how much would you say you spend on gaming activities?

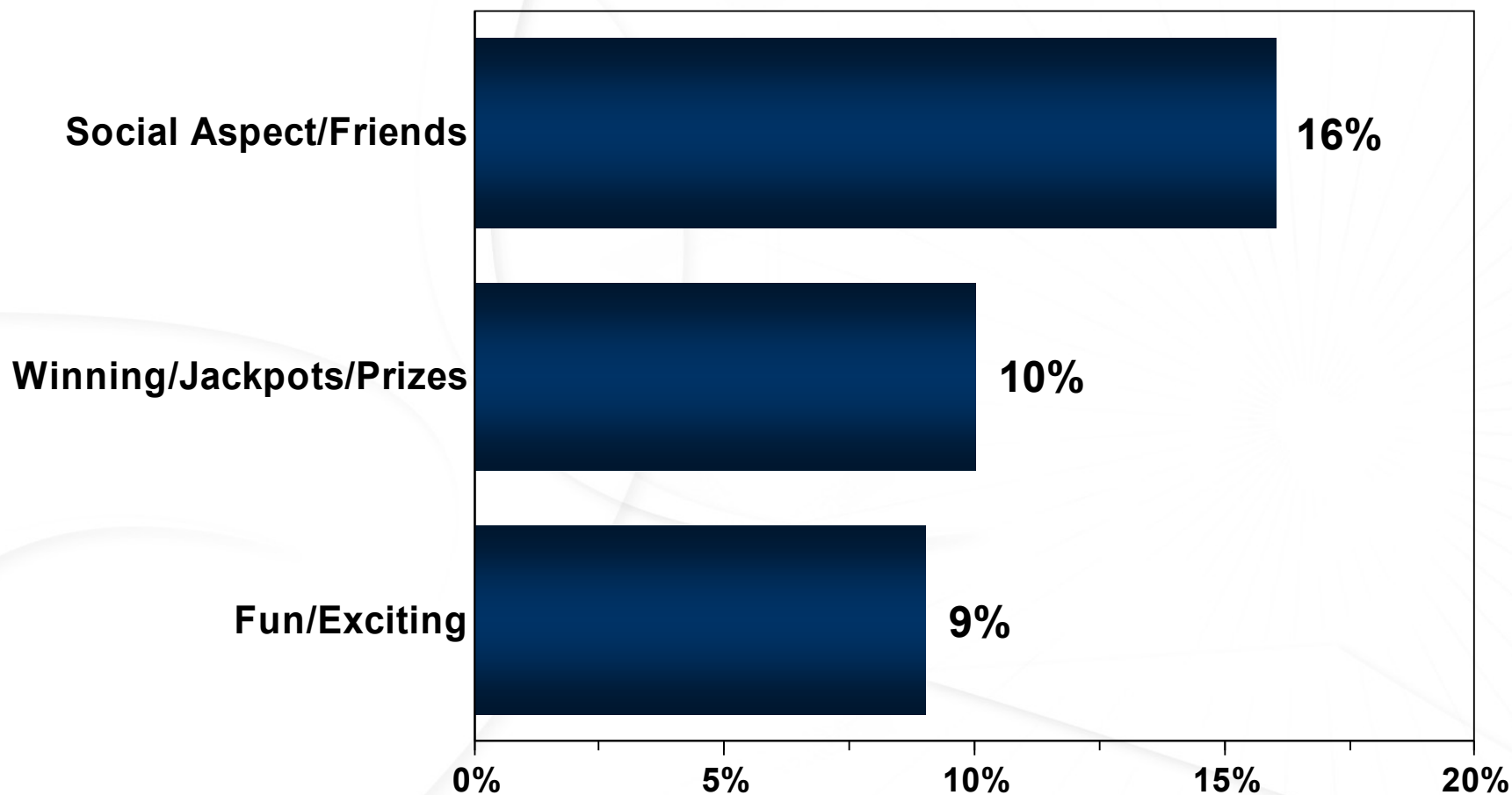
Recent Players Spend More Money on Bingo



Q18. In a given month, how much would you say you spend on bingo activities?

Attitudes Towards Bingo

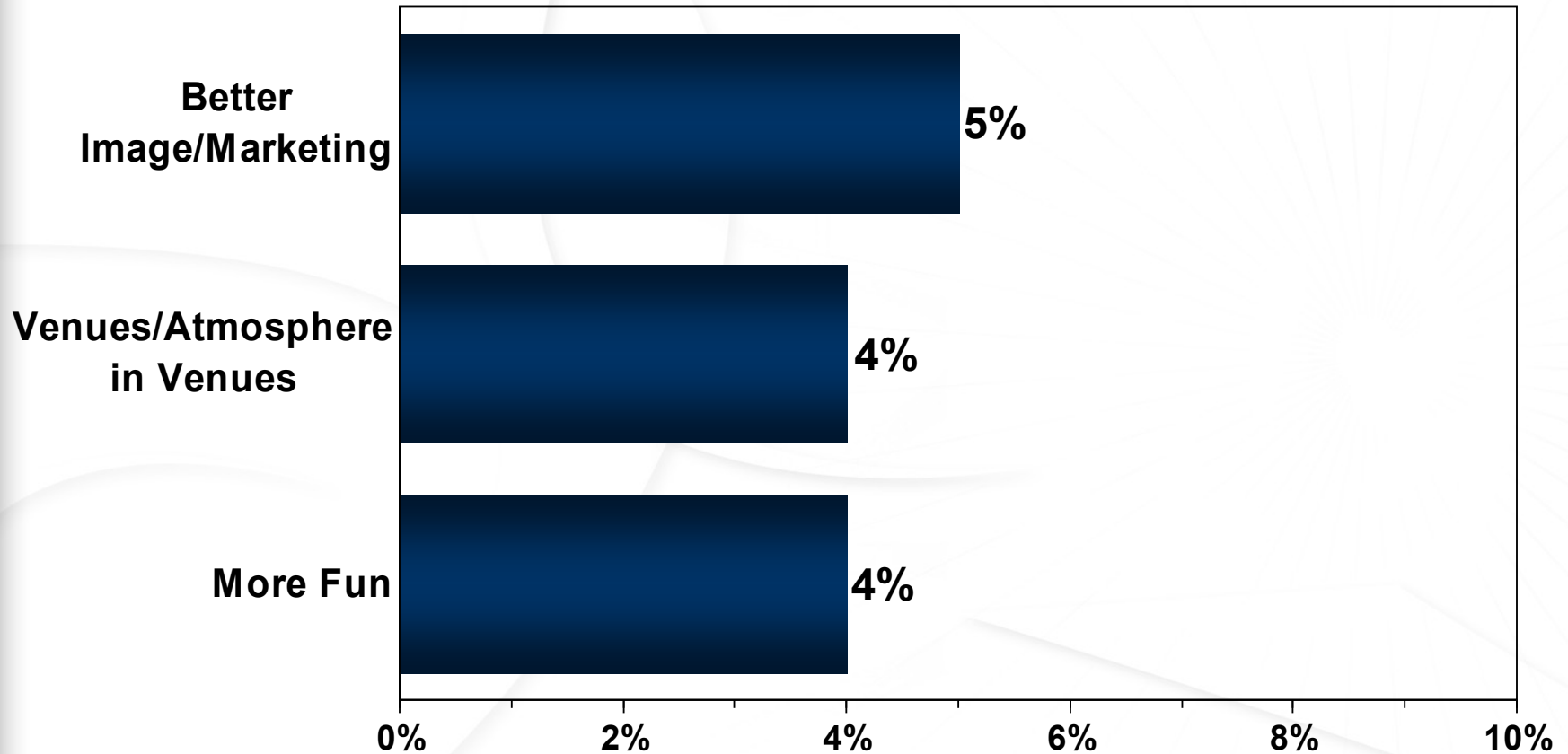
Strengths of Bingo: Top-of-Mind



Q51. And in your opinion, what is the BEST THING about playing bingo?

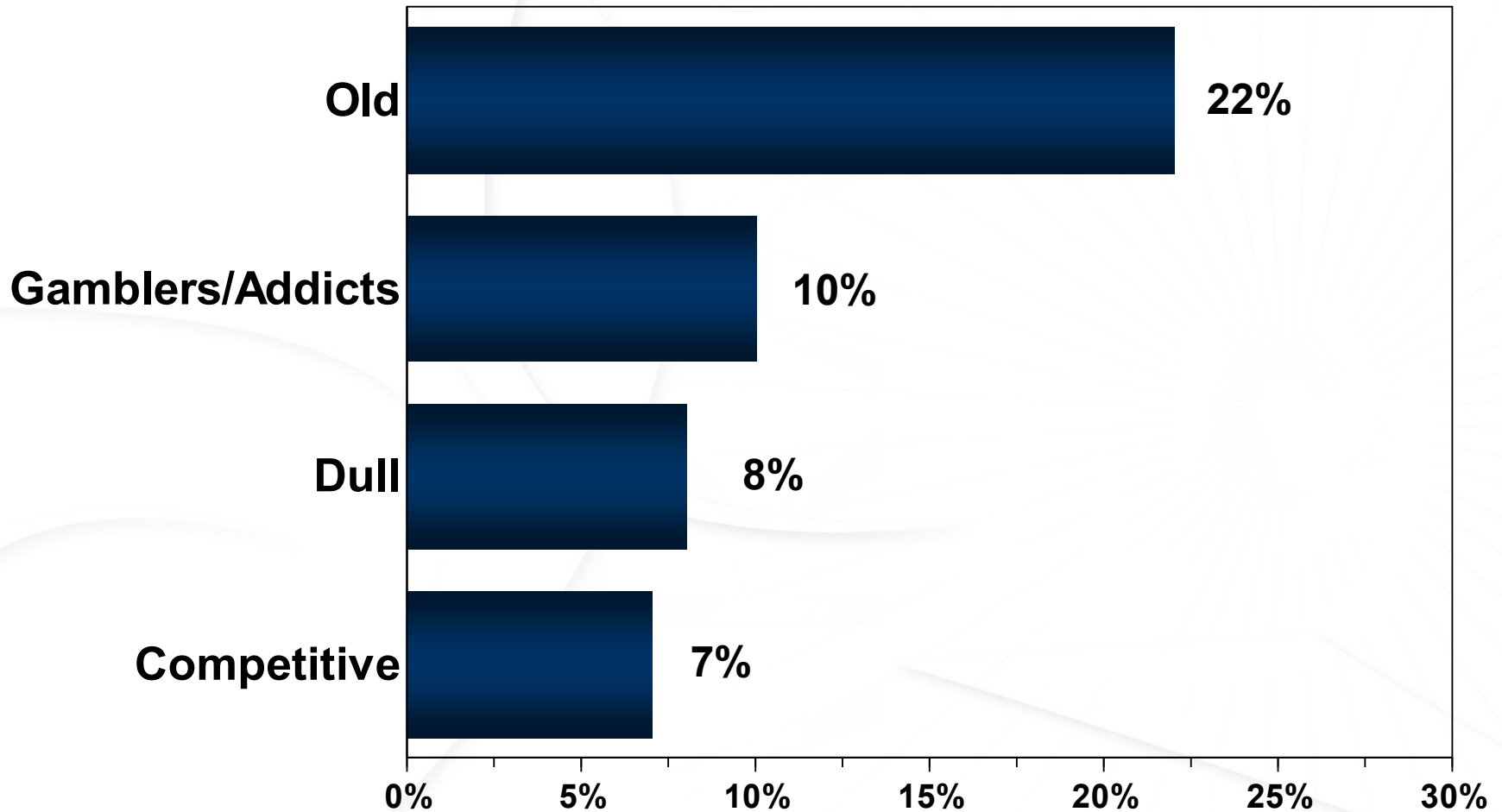
Bingo's Areas for Improvement: Top-of-Mind

- *Most say they don't know how to improve the game*



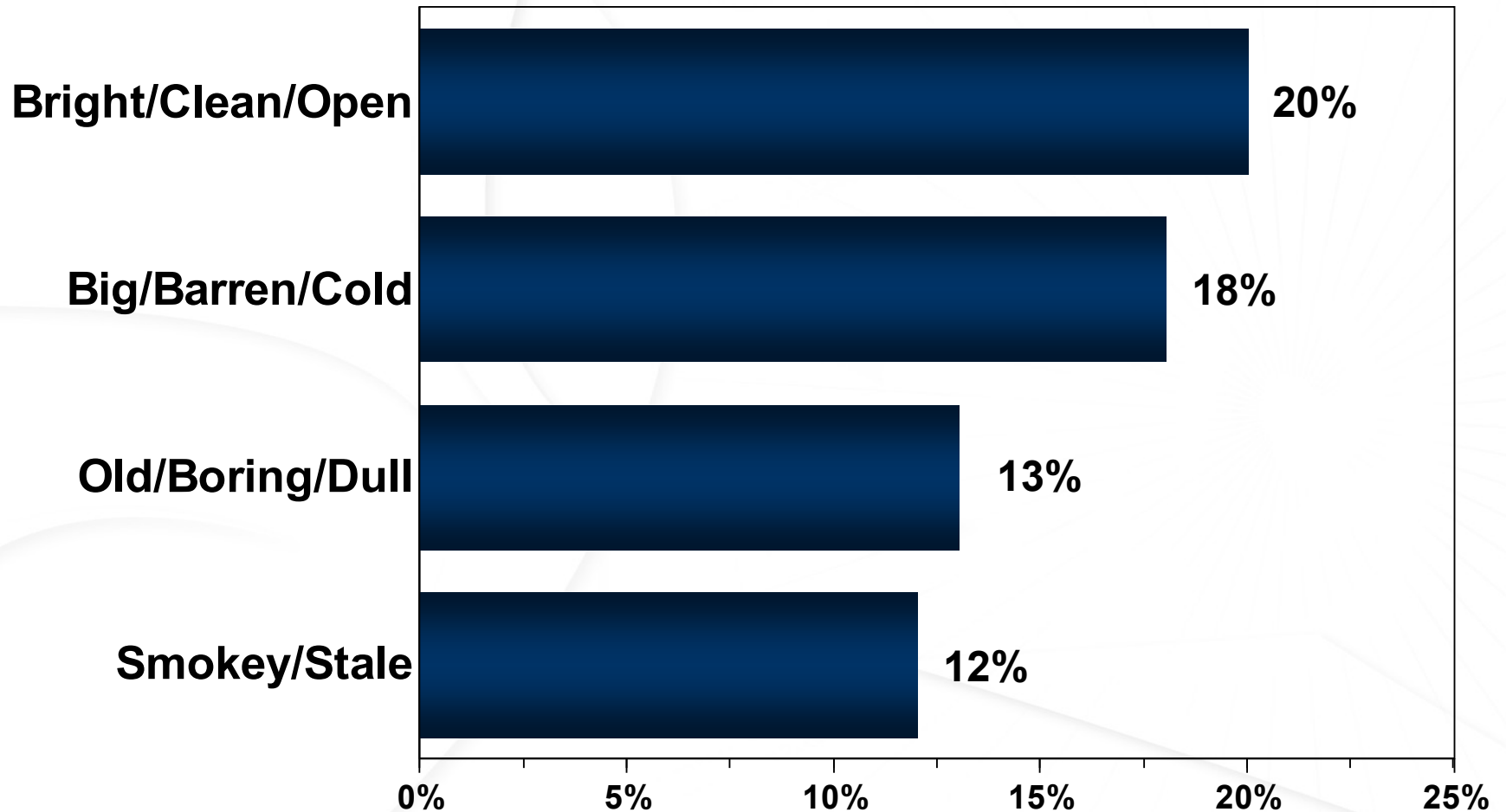
Q52. What is the thing about bingo that needs the MOST IMPROVEMENT?

Ontarians' Perceptions of Bingo Players



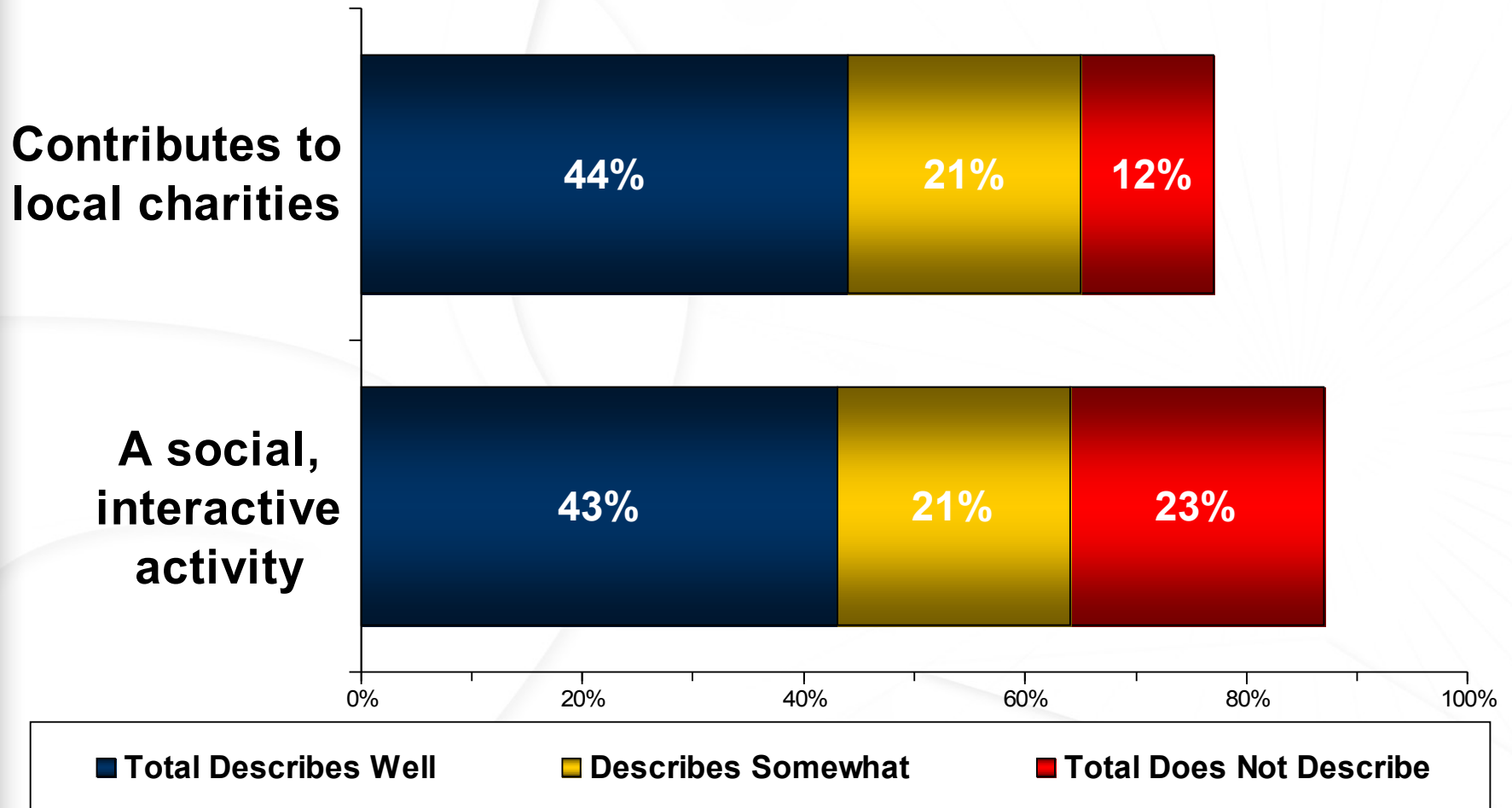
Q69. *In a few words or phrases, how would you describe people who play bingo?*

Descriptions of Bingo Facilities



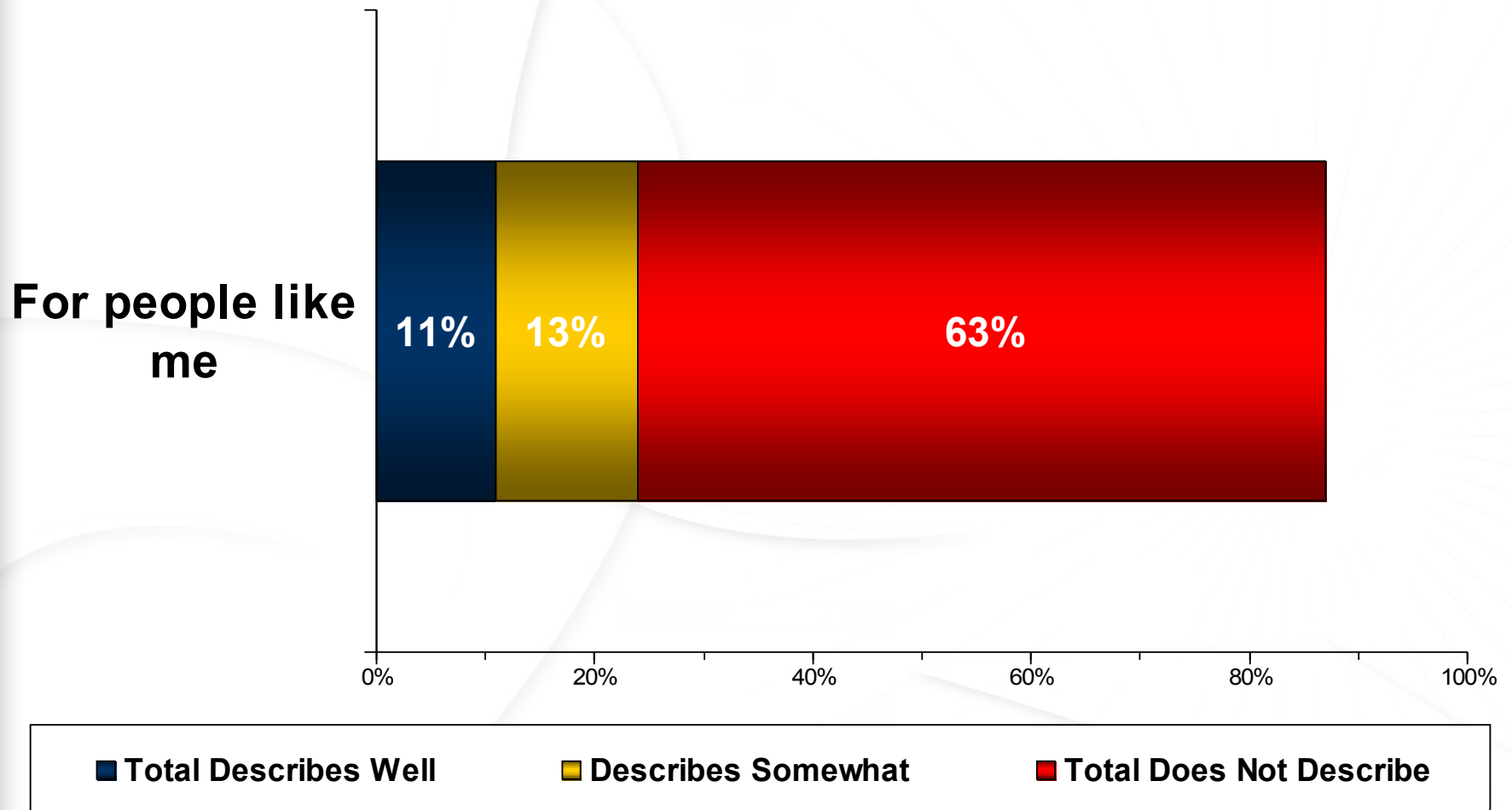
Q70. In a few words or phrases, how would you describe the facilities in which bingo is played?

Testing: How Well Positive Phrases Describe Bingo



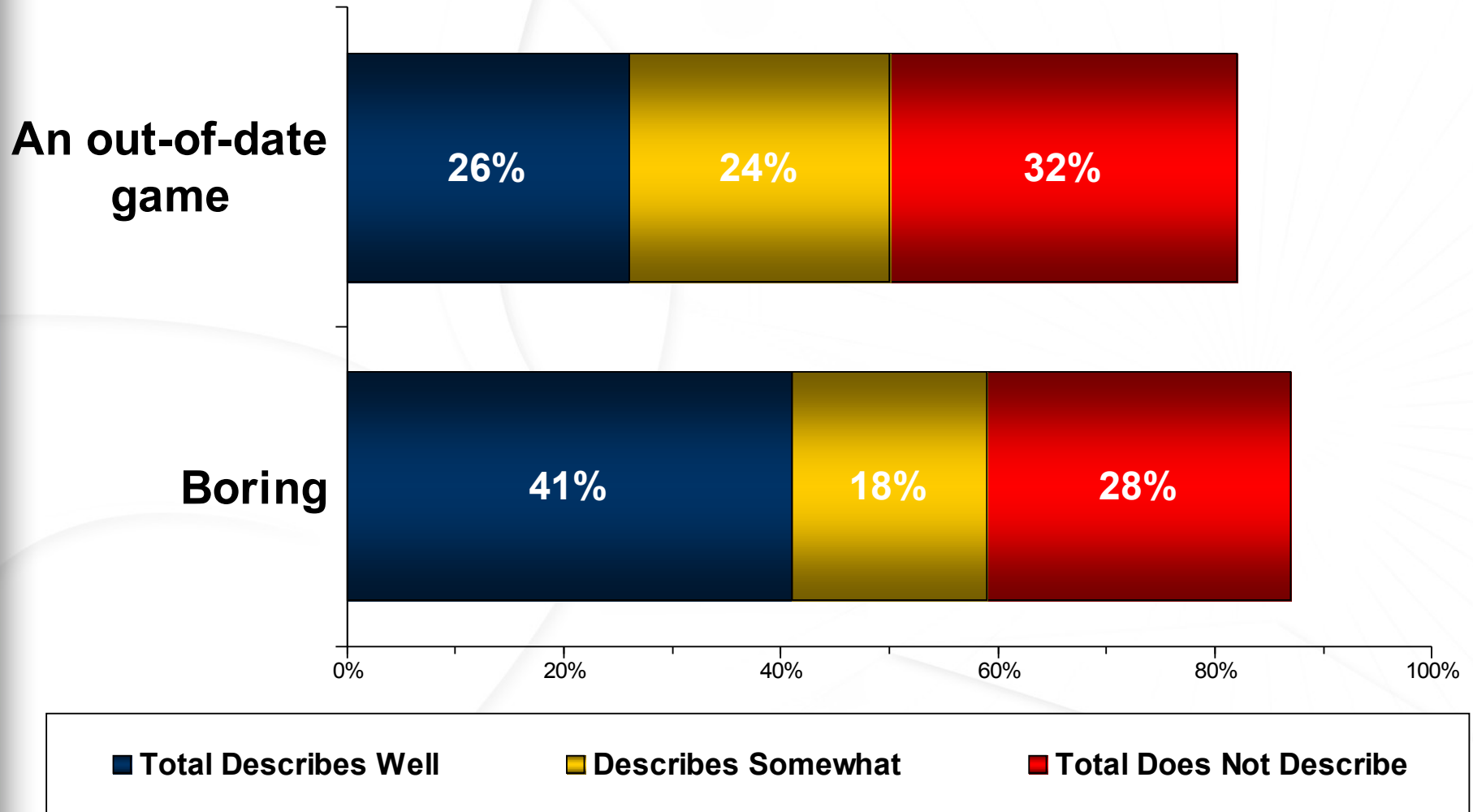
Q53-Q62. Now, I am going read a list of words and phrases. Using a scale of 1 to 10, where 1 is "does not describe at all" and 10 is "describes perfectly", please tell me how well you think each one describes the game of Bingo that is played in Bingo Halls, Churches, or other facilities. What about...

Testing: How Well Positive Phrases Describe Bingo



Q53-Q62. Now, I am going read a list of words and phrases. Using a scale of 1 to 10, where 1 is "does not describe at all" and 10 is "describes perfectly", please tell me how well you think each one describes the game of Bingo that is played in Bingo Halls, Churches, or other facilities. What about...

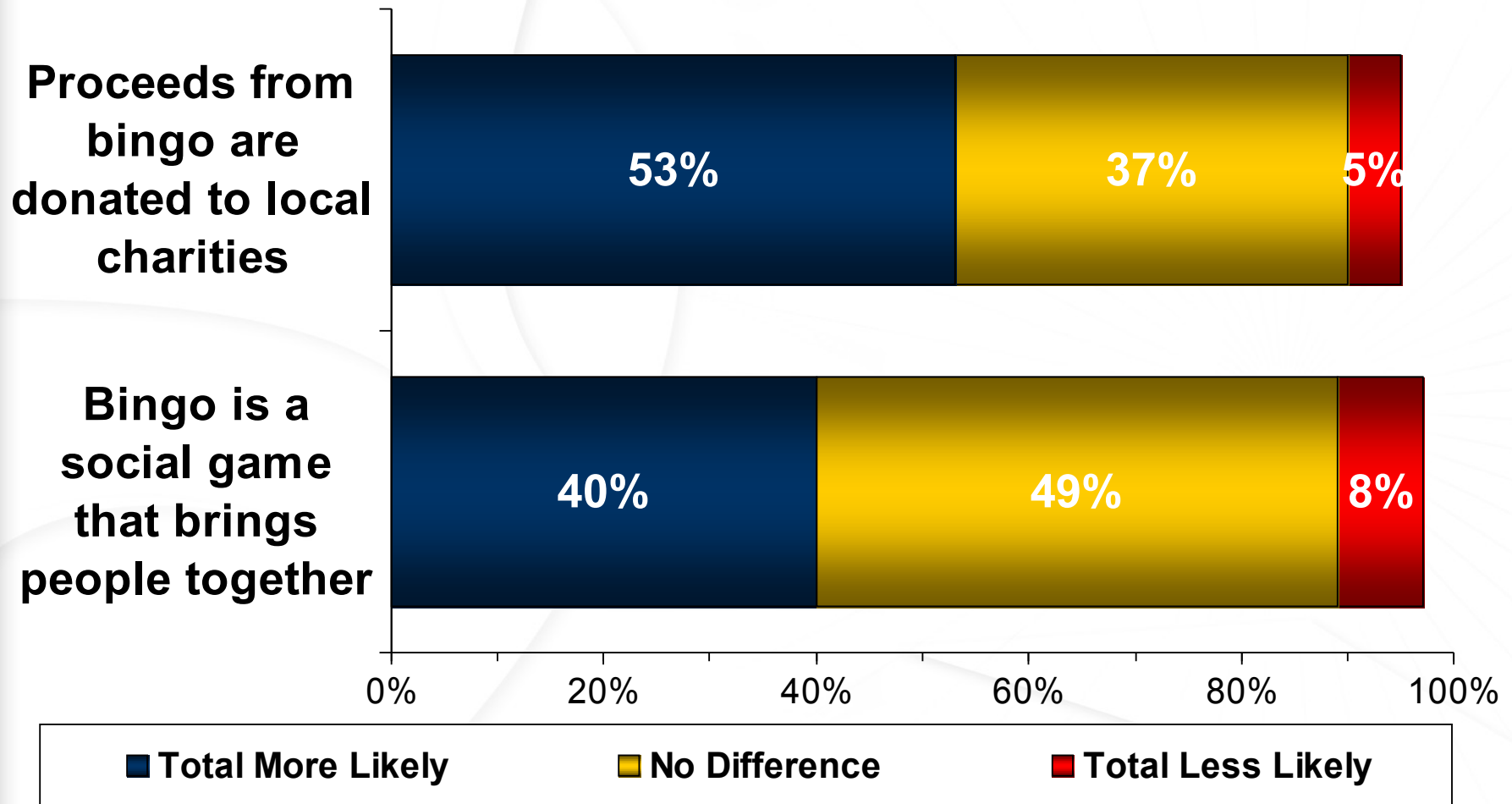
Testing: How Well Negative Phrases Describe Bingo



Q53-Q62. Now, I am going read a list of words and phrases. Using a scale of 1 to 10, where 1 is "does not describe at all" and 10 is "describes perfectly", please tell me how well you think each one describes the game of Bingo that is played in Bingo Halls, Churches, or other facilities. What about...

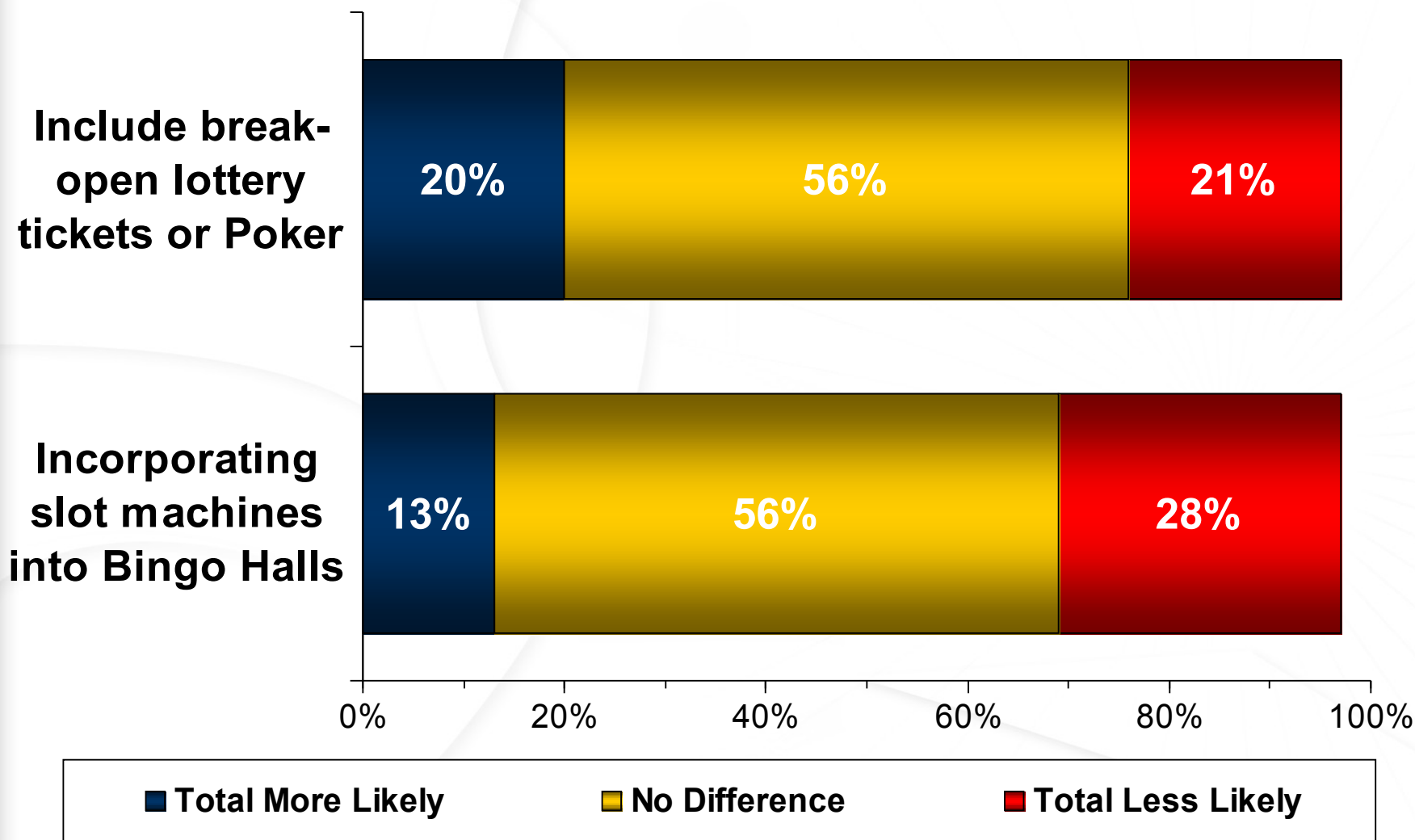
**Message & Proposal Testing:
Assessing the Impact on Bingo
Participation**

Testing: Increasing Potential to Play



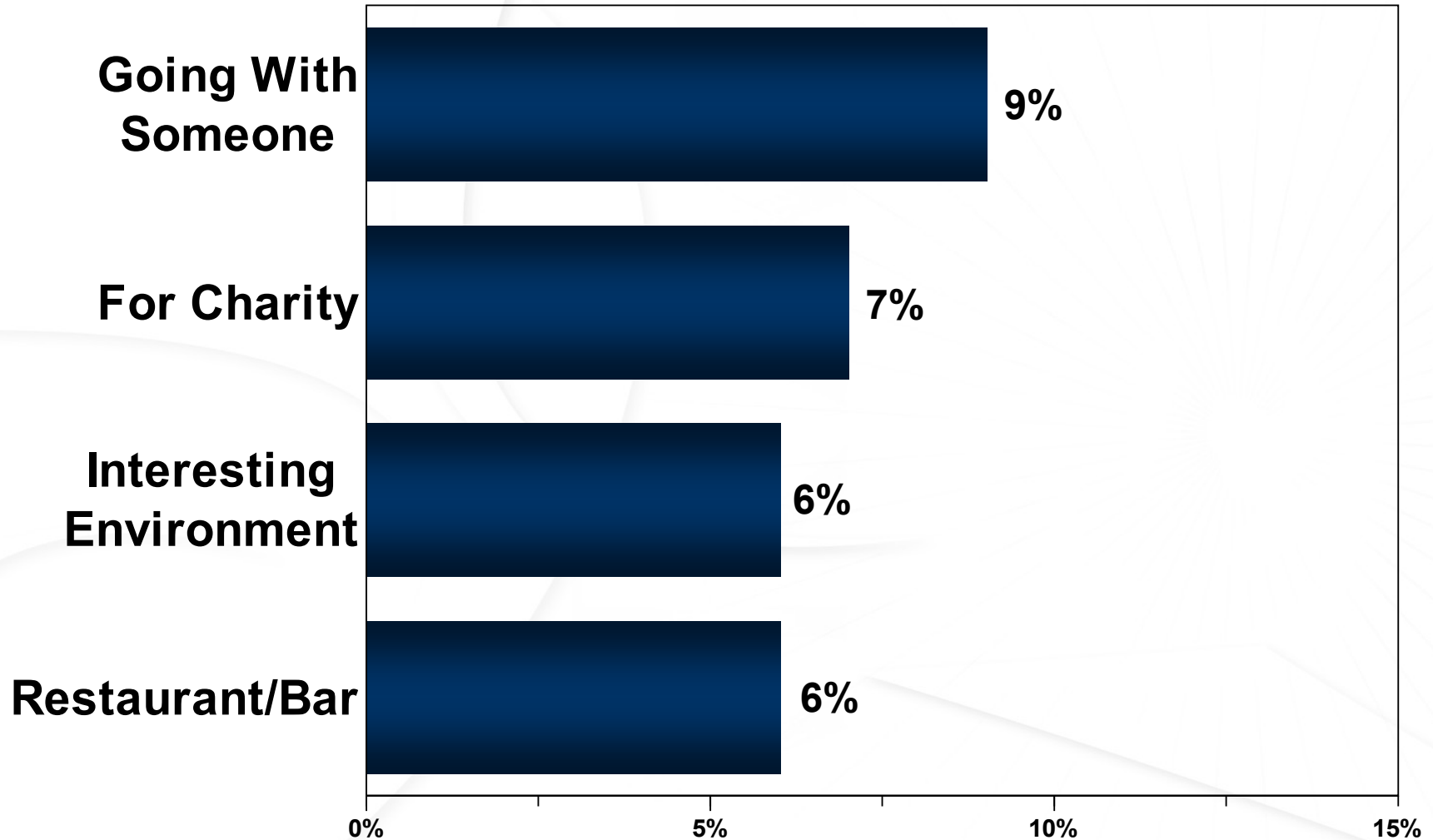
Q72-75. I am going to read a list of statements. For each one, please tell me if it would make you much more likely, somewhat more likely, somewhat less likely, or much less likely to participate in a Bingo game, or if it would make no difference to you. What about...

Testing: Increasing Potential to Play



Q76-82. Now I am going to read a list of potential changes to the Bingo industry. For each one, please tell me if it would make you much more likely, somewhat more likely, somewhat less likely, or much less likely to visit a bingo hall, or if it would make no difference to you. What about...

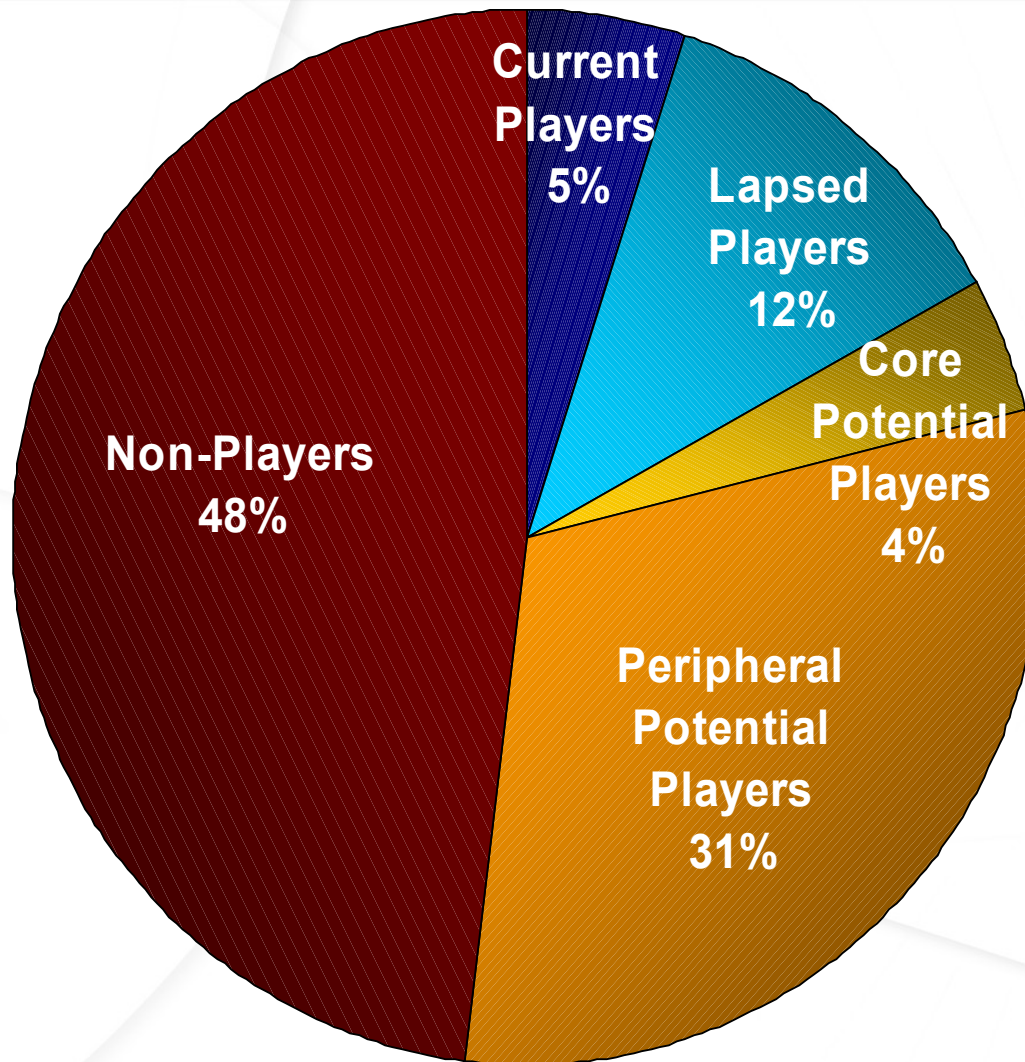
Top-Of-Mind: Most Likely Motivation to Visit Bingo Hall



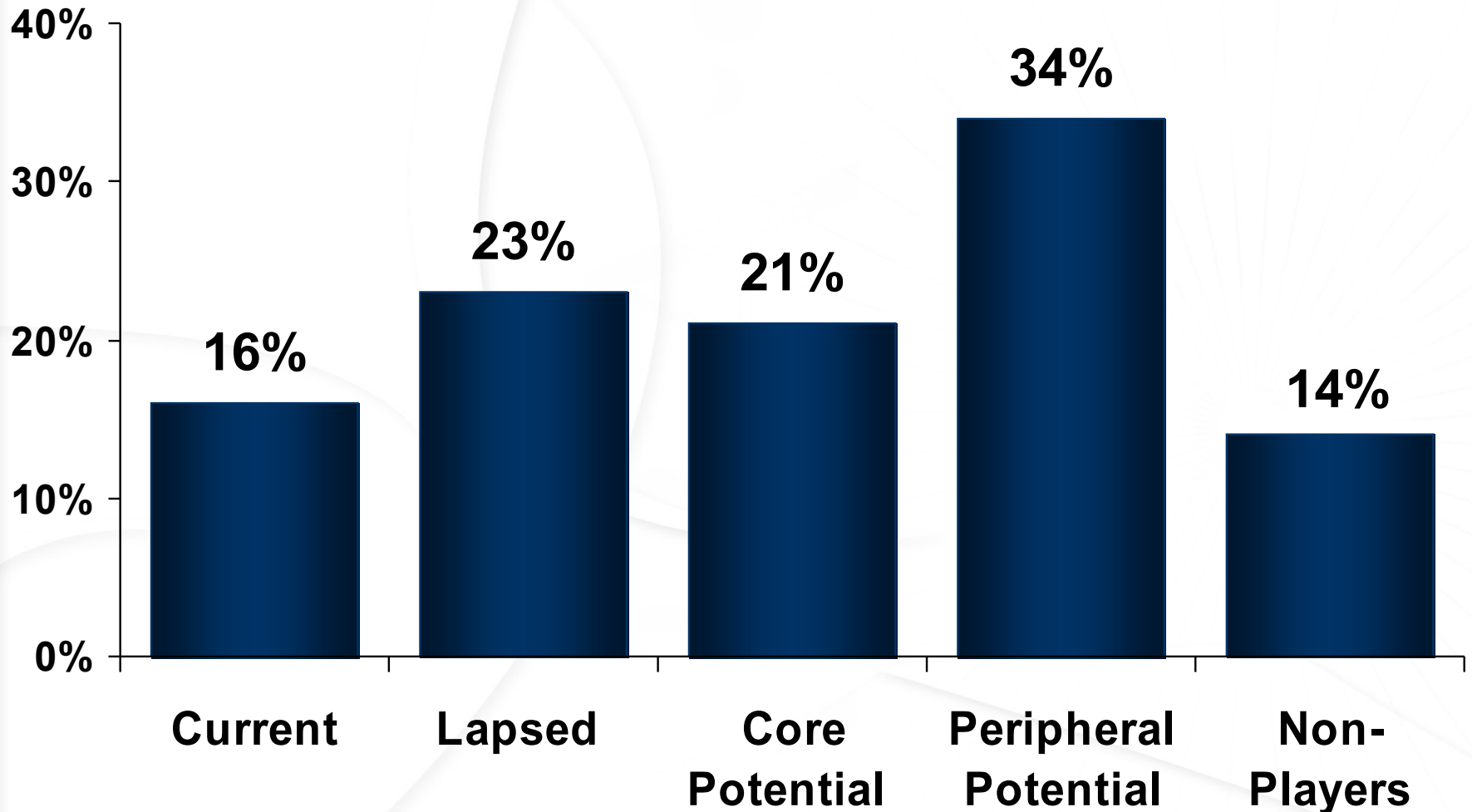
Q83. Overall, thinking about all that we have discussed today, what is the one thing that would make you the most likely to visit a bingo hall in the near future?

Segmenting the Bingo Market

Bingo Market Segmentation

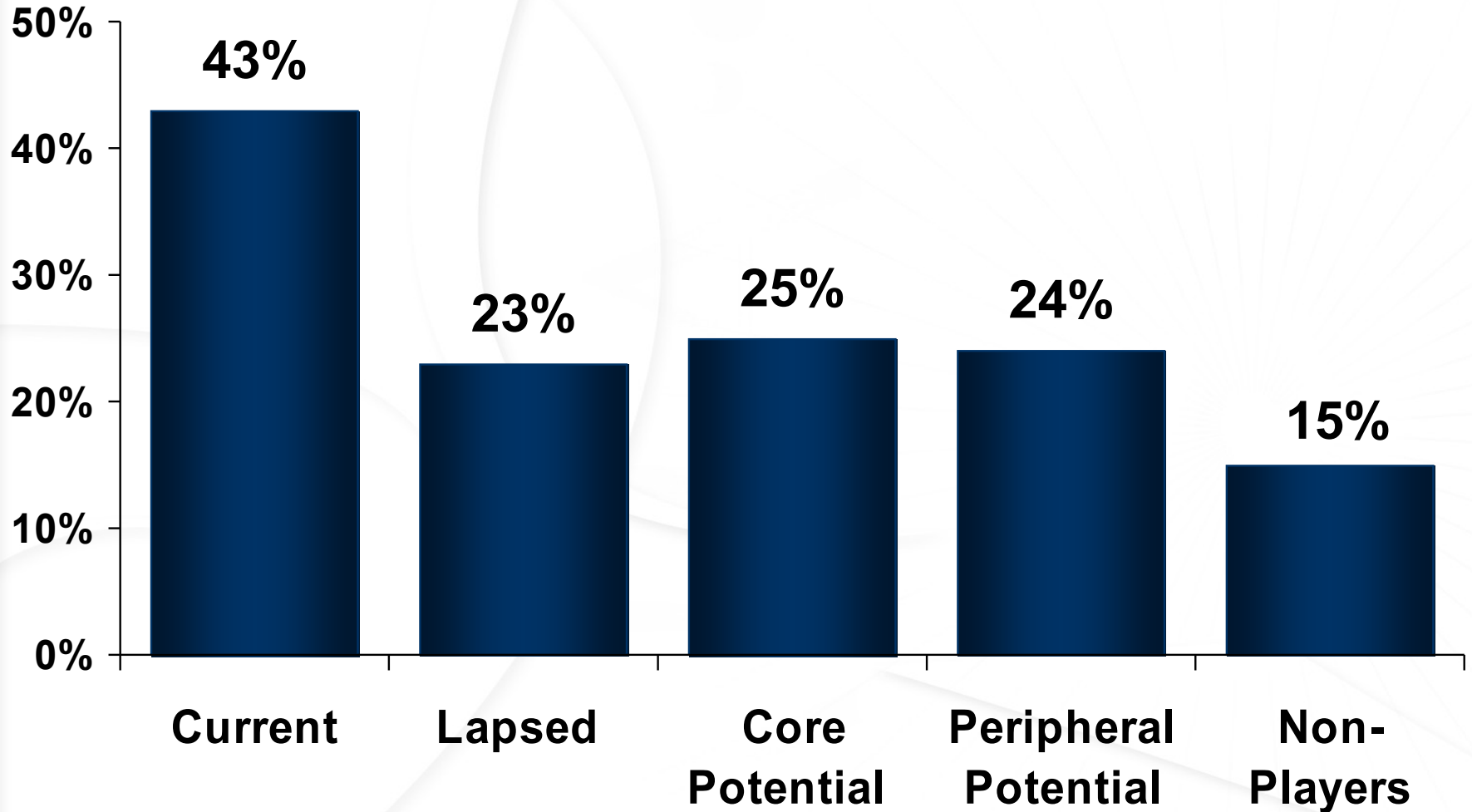


How Many in Each Group Describe Players As: “Old”



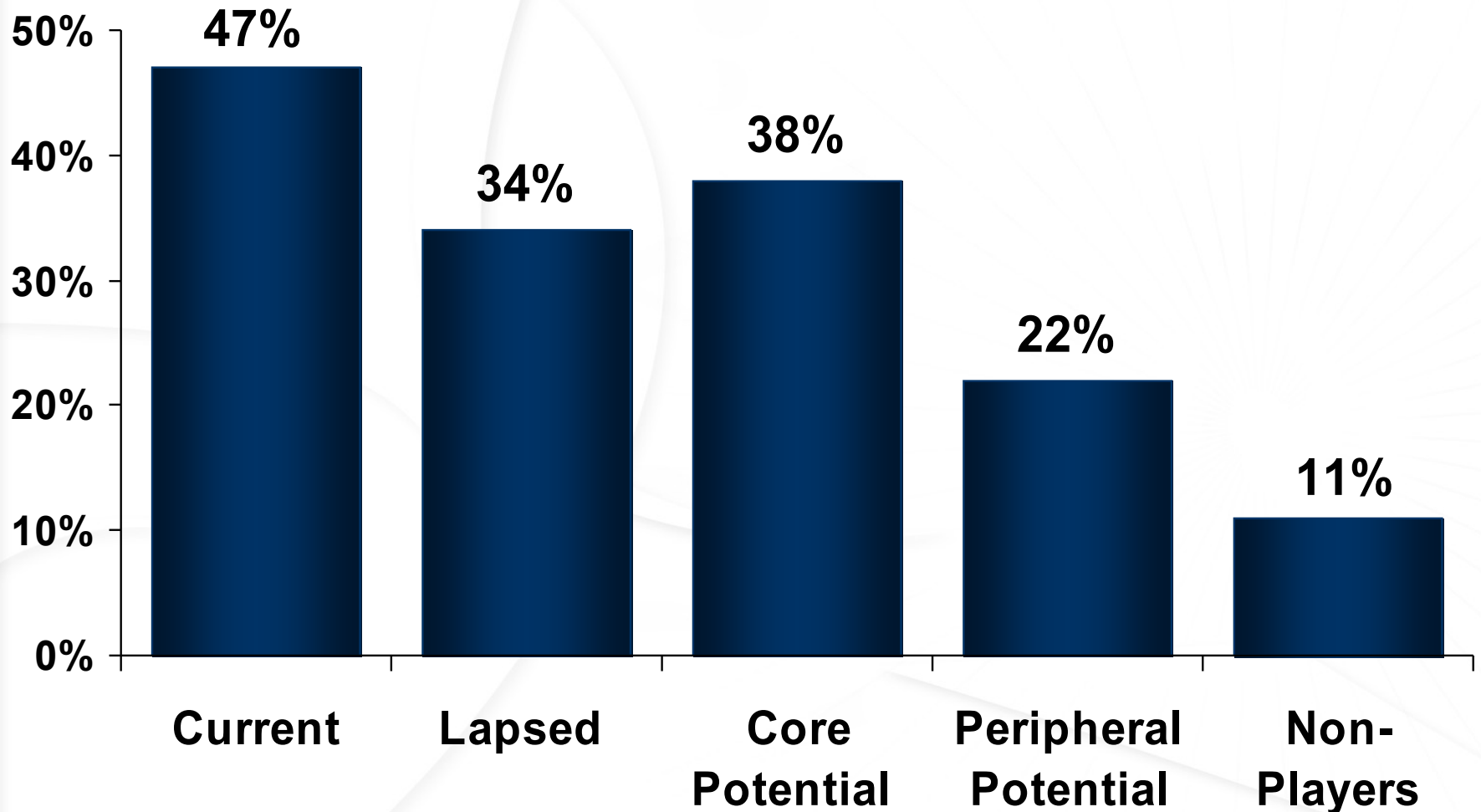
Q69. *In a few words or phrases, how would you describe people who play bingo?*

How Many in Each Group Describe Players As: “Sociable/Friendly”



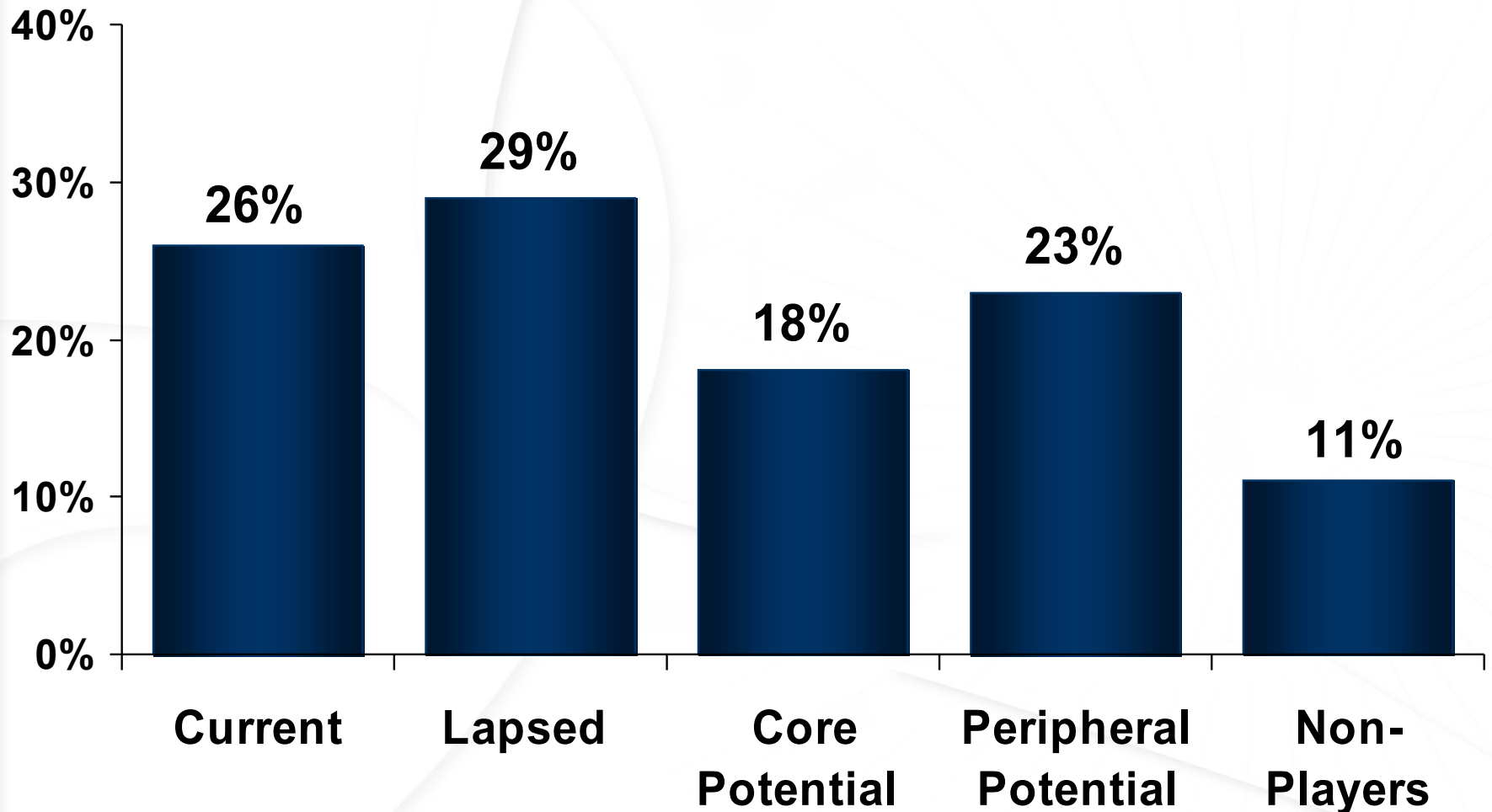
Q69. *In a few words or phrases, how would you describe people who play bingo?*

How Many in Each Group Describe Facilities As: “Bright/Clean/Open”



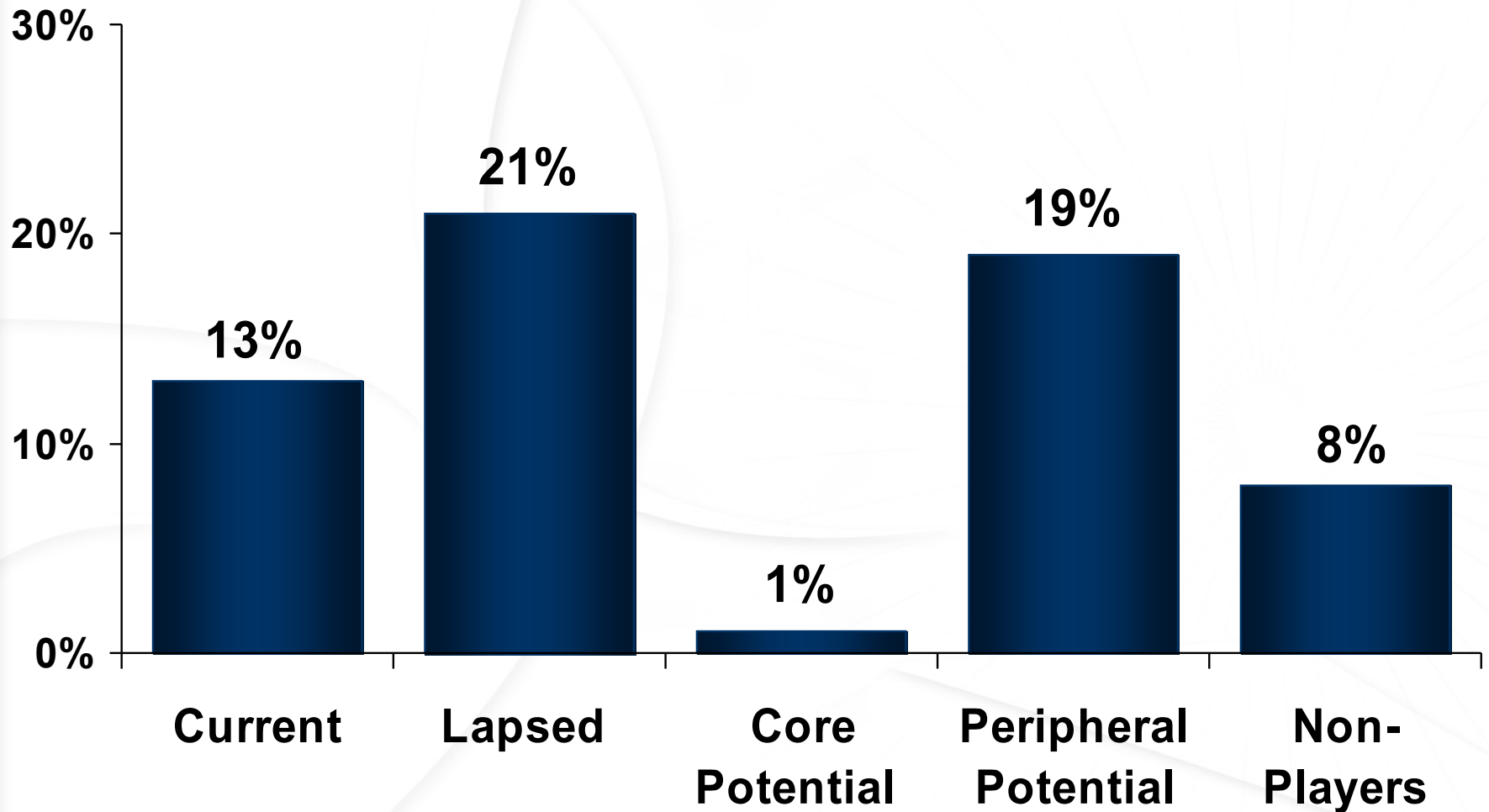
Q70. In a few words or phrases, how would you describe the facilities in which bingo is played?

How Many in Each Group Describe Facilities As: “Barren/Cold”



Q70. In a few words or phrases, how would you describe the facilities in which bingo is played?

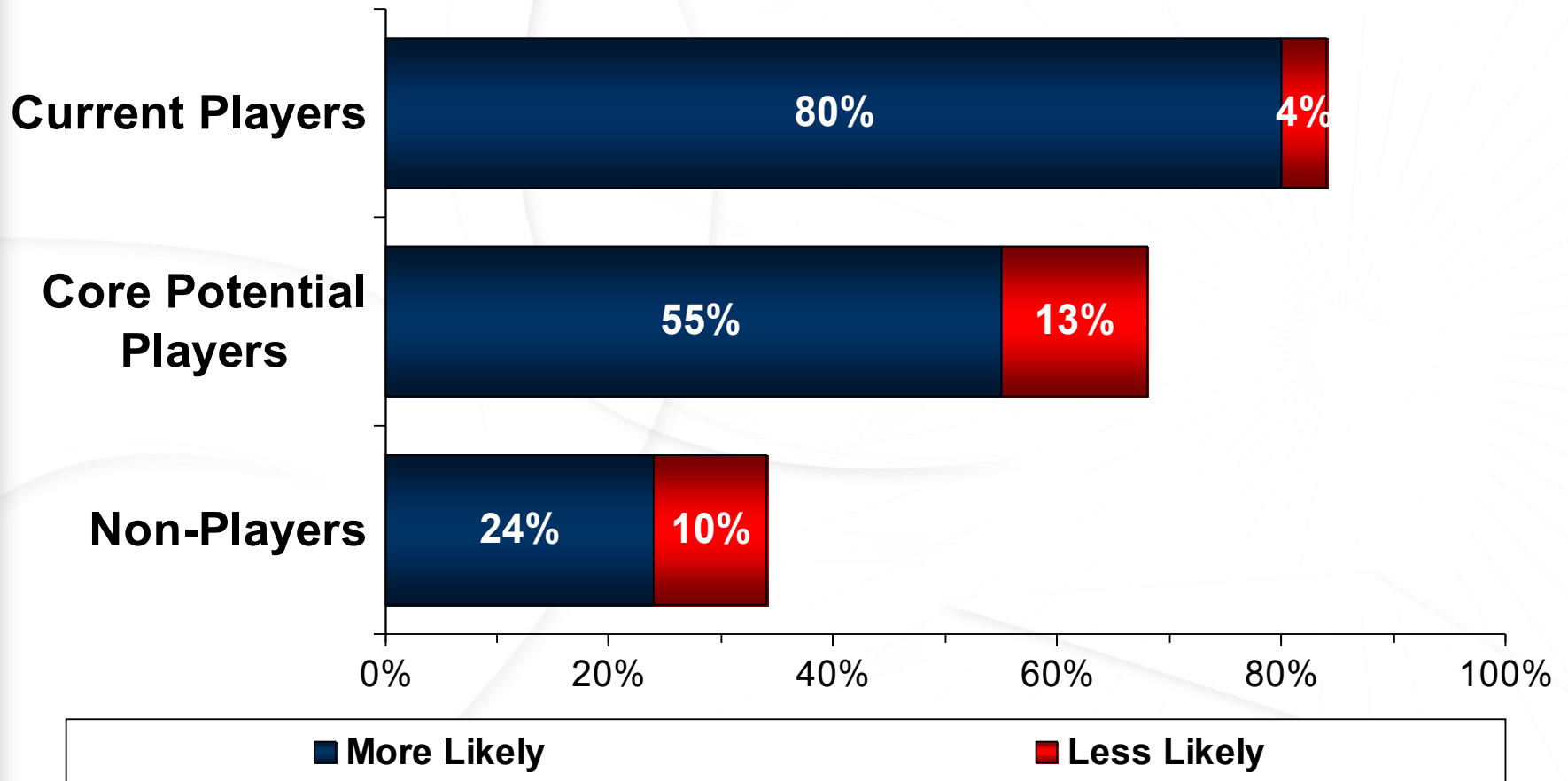
How Many in Each Group Describe Facilities As: “Dull”



Q70. In a few words or phrases, how would you describe the facilities in which bingo is played?

Does the message increase potential to play?

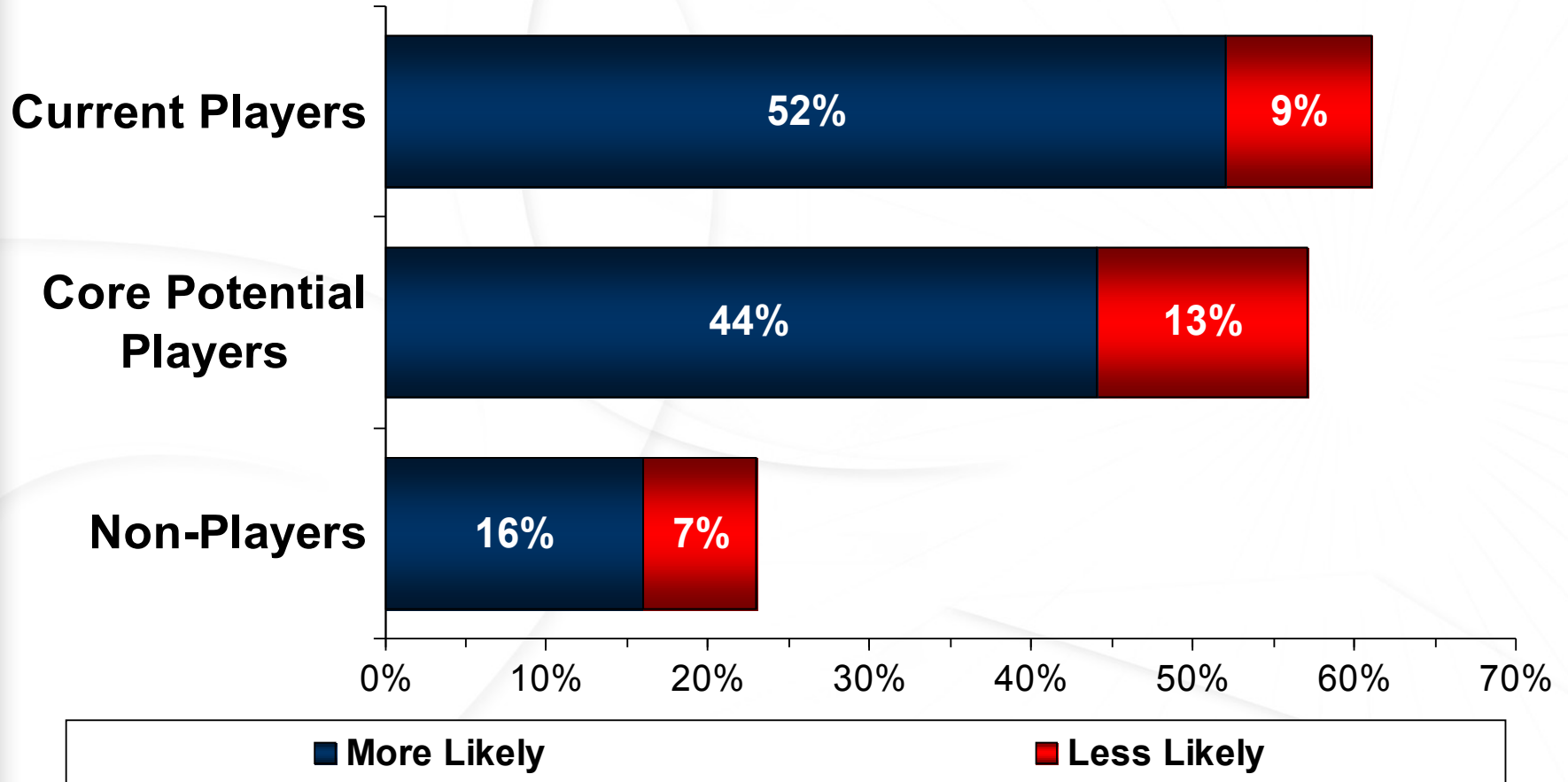
“Bingo is a social game that brings people together”



Q76-82. Now I am going to read a list of potential changes to the Bingo industry. For each one, please tell me if it would make you much more likely, somewhat more likely, somewhat less likely, or much less likely to visit a bingo hall, or if it would make no difference to you. What about...

Does the message increase potential to play?

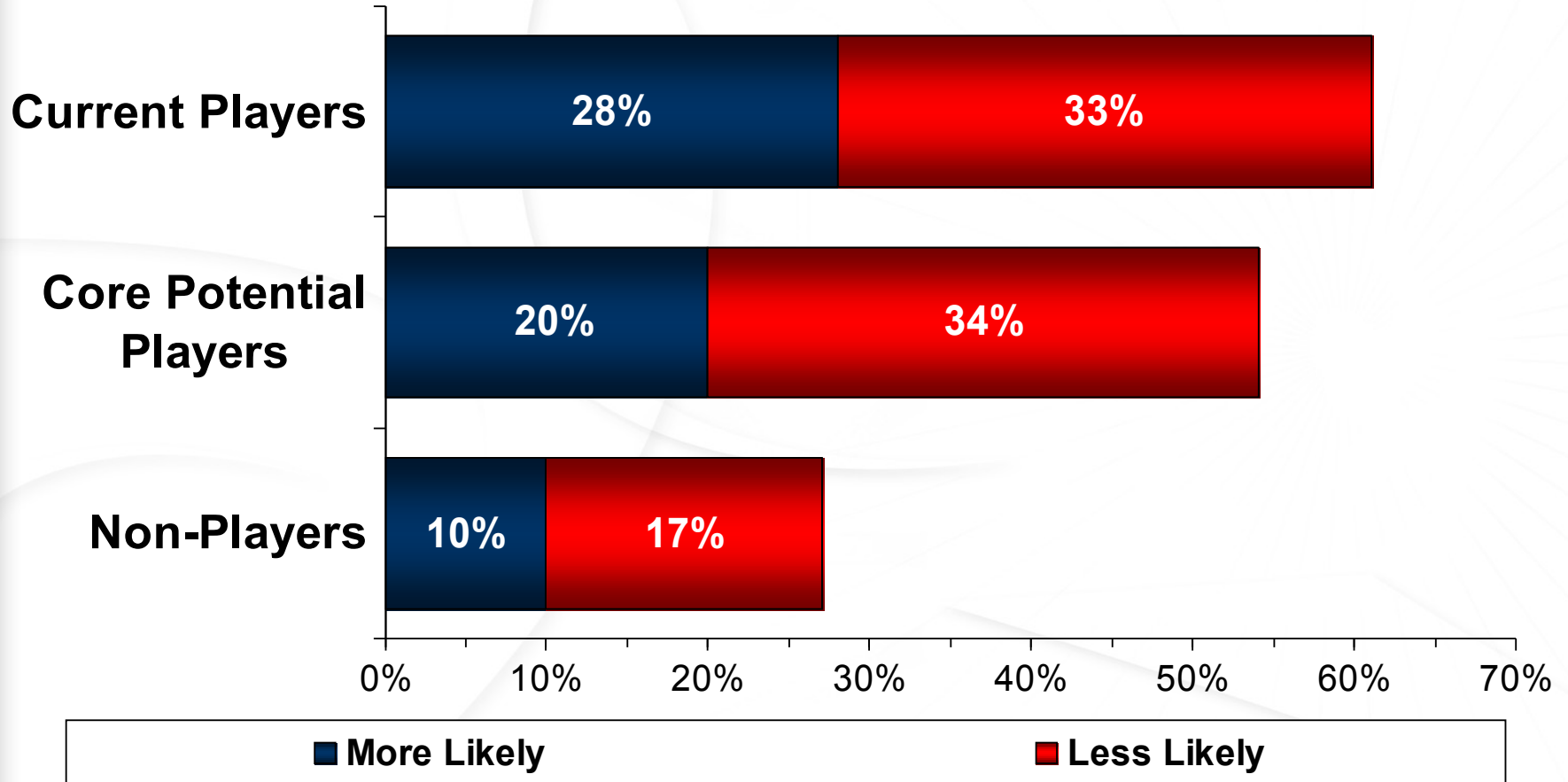
“Renovating Facilities to Update Décor”



Q76-82. Now I am going to read a list of potential changes to the Bingo industry. For each one, please tell me if it would make you much more likely, somewhat more likely, somewhat less likely, or much less likely to visit a bingo hall, or if it would make no difference to you. What about...

Does the message increase potential to play?

“Expanding Facilities to Include Break-Open Tickets or Poker”



Q76-82. Now I am going to read a list of potential changes to the Bingo industry. For each one, please tell me if it would make you much more likely, somewhat more likely, somewhat less likely, or much less likely to visit a bingo hall, or if it would make no difference to you. What about...

The background features a light gray sunburst pattern on the right side, with thin lines radiating from a central point. On the left, there are several overlapping, semi-transparent white circles of varying sizes, creating a layered effect. The overall aesthetic is clean and modern.

Next Steps

POLLARA 

**101 Yorkville Avenue, Suite 301
Toronto, Canada M5R 1C1**

Tel: 416.921.0090 | Fax: 416.921.3903

www.pollara.com