

# *Ontario Bingo Development Fund Update*

April 27, 2009

## **Many Initiatives Are Underway**

Your OBDF has been working hard developing a number of initiatives and tools to assist the industry. Activities are a combination of *research, education, tools, and promotional events* for the charitable bingo sector. **A Members' Meeting will be held on June 22nd from 1:30 to 3:30 PM at the Vallhalla Inn, Etobicoke, to talk directly with you, providing greater detail, answering your questions, and to seek your input and ideas.**

## **Bingo Night in Ontario Wrap-Up**

The *Bingo Night in Ontario*, hosted by Don Cherry last fall, was generally seen as a success by the industry. The industry greatly appreciated the ready-made tools that were provided for promoting this event locally. The media templates for both print and radio were easy to use and provided real benefit.

The core objectives of this initiative were two-fold: a) engage the Fund and all participating Bingo Centers and Hall Charities Associations in a large event, and b) generate awareness for Charitable Gaming in the province. The view of the Board is that both objectives were achieved and in most cases succeeded. The profile that Don Cherry brought to the event was tremendous and through his involvement, we managed to receive numerous press inquiries, which allowed the Fund to profile Bingo and the charitable aspect.

It was further noted that the engagement at the local level, with various Bingo Centres decorating or dressing-up, added an additional element of excitement which made a direct connect between the *Staff, Charities, and Customers*.

Without question, on the day of the event, the industry did see an increase in their admissions. The deployment by the Fund of providing the \$1,000 consolation seed went over very well. The sense was that large events that heighten and create awareness do have value and begin to strengthen our Brand. The Board agrees that on a periodic basis the Fund should provide large provincial events.

*We would like to thank the staff at the Alcohol and Gaming Commission for their tremendous support and very quick turnaround times for this very complex initiative.*

## Consumer Research

Pollara, a professional, experienced research firm, is carrying out *comprehensive* consumer research on bingo customers and non bingo customers. The purpose of the research is to assist the industry in making well informed decisions regarding advertising, marketing, and promotions. It should also assist with informing decisions about games, programs, and improvements to facilities, providing valuable information about what motivates existing players and what is required to attract lapsed and potential new players.

The first phase of the research – a general population survey is complete and more detailed surveys with current bingo customers and lapsed bingo customers is nearing completion.

As well, Pollara is carrying out some cross-border research in Windsor/Detroit and Fort Erie/Niagara, so that U.S. players and potential customers are included in the research. We are attaching a summary of the first phase of this study. We would caution that a more comprehensive picture of our customers and potential customers will be captured once all phases of the research are completed. We expect that all the results of the research will be available to you later in May. Material will be distributed to all Fund contributors and there will be an opportunity to hear directly from Pollara at the members' meeting in June.

The OBDF will be using the results of the consumer research to inform decisions about other marketing initiatives as we move forward. We want to ensure that the Fund is using your dollars most effectively to assist the industry.

## Marketing Workshops and Support

We have engaged the *Canadian Marketing Association (CMA)* to present a series of Marketing Workshops across the province beginning in late May. The day-long workshop will cover the basics of effective marketing and promotion and provide an opportunity to work through the development of a marketing plan. **The first two dates for these events are May 26<sup>th</sup> in the GTA and May 28<sup>th</sup> in the western part of the province.** Details regarding these two sessions will be

announced soon and workshops will be offered in other parts of the province at later dates.

The OBDF has engaged a professional marketer, Mona Sharkawy, from KISP sales & Marketing Solutions Inc. to develop a template that the industry may use in preparing the now required (by AGCO) Marketing Plans. The Board has also approved purchasing a limited amount of professional time to offer the review of marketing plans from the industry. We will also provide professional contacts for operators and Hall Charities Associations that would like to engage more support at the local level.

We hope that these tools will help to support you in making the best possible use of your marketing dollars.

## Bring a Buddy Campaign

"*Bring a Buddy to Bingo*" is a business-building initiative that is familiar to many Bingo Centres. The difference is that this is a provincial effort for four weeks in June with materials and prizes provided by the OBDF.

This is a "no purchase required" promotion that should be easy for charities and operators to customize. The objective is to bring people to bingo that have never been in a Bingo Centre setting or have been in a Bingo Centre setting at some point, but not in the past six months or more.

The initiative will capitalize on the *social nature of bingo* – target existing customers and encourage them to bring a friend (or several!) to the Bingo Centre. At the same time, it will reward existing customers and provide an incentive for prospective customers for their participation in the program through the two \$500 draw prizes at each participating centre.

Materials for this initiative are now in production and will be sent out to Bingo Centers in late May. If you did not receive the *Bring a Buddy* communication last week, please contact our Project Manager, Marian Magrane. **Also if you have not signed up, please do so through Marian ASAP.**

Marian Magrane at [magrane@sympatico.ca](mailto:magrane@sympatico.ca) or 416-938-9468.

## Another Big Provincial Initiative

The OBDF is working on a *very big event* for the summer to drive traffic during a period that is usually very challenging for operators and charities. This will be

another large provincial marketing initiative. We will be sending out communication as soon as the details are worked through.

## Your Board of Directors

President	Peter McMahon, CEO, CGAO
Vice-President	Cam Johnstone, Vice President, Delta Bingo
Secretary/Treasurer	Lynn Cassidy, Executive Director, OCGA
Board Member	Diane Austen, President, Delta Oakville Charity Association
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Board Member	Ron Foster, President, Bingo Country Association of Windsor
Board Member	Jordan Gnat, CEO, Boardwalk Gaming & Entertainment
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Board Member	Paul Nitsopoulos, Owner, Dolphin Bingo, Toronto

## Advisors:

Kathy Klas, Director, Sector Liaison Branch, Alcohol and Gaming Commission of Ontario (AGCO)

Russ Wilson, Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO)

**If you have any questions or suggestion please, direct them as follows:**

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### *From Operators*

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## Memorandum

**To: Ontario Bingo Development Fund**

**From: Katherine Valiquette, Senior Research Consultant, Pollara**

**Date: April 21, 2009**

**Re: Summary of Baseline Study Results and Next Steps**

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Thank you for the opportunity to work with the Ontario Bingo Development Fund (OBDF) on this quantitative research study to profile Bingo Gaming in Ontario. Below is a summary of the research completed to date, and the objectives for the subsequent phases of research.

The Ontario Bingo Development Fund (OBDF) commissioned Pollara to conduct a baseline survey of Ontarians on their attitudes and opinions towards leisure activities and more specifically, about thoughts on gaming activities like Bingo throughout the province.

Between January 7<sup>th</sup> – 14<sup>th</sup>, 2009, Pollara conducted a series of telephone interviews using a CATI-telephone instrument among a randomly selected, representative sample of Ontarians 18 years of age and older. In total, 1,514 respondents completed the survey, resulting in an overall margin of error of  $\pm 2.52\%$ , nineteen times out of twenty. At the data analysis stage, the data were weighted by age, region, and gender according to the most recent census data to ensure they are representative of the overall population of Ontario.

In preliminary analysis of the baseline survey, there are opportunities to increase the bingo market – however, data suggests that there are still significant challenges and obstacles to overcome. These challenges and obstacles, such as individuals' preconceived notions about the game of bingo and the facilities in which it is played, form the core of research presently in field, to assess whether recent upgrades impact the impressions of the potential market.

Other key findings from the baseline survey include:

- Ontarians were classified into five key player segments based on their responses to message-testing questions, their propensity to play Bingo, and their orientations toward the game:
  - *Current players*, (5%) who have played in the past year and who intend to do so again;

- *Lapsed players*, (12%) who have played in the past two years but who do not intend to return, or those who played longer ago but not more recently;
  - *Core Potential players*, (4%) who intend to play bingo and have played at least once over a year ago, or those who are left more likely to play by messages tested;
  - *Peripheral Potential players*, (31%) who have never played and are left somewhat more likely to play by at least one “change” message tested; and
  - *Non-Players*, (48%) who have never played, and do not gamble, or who do not exhibit propensity to play bingo (e.g., they do not think that there is any one element of the game or a change that would encourage them to play).
  - Notably, “Core Potential” players exhibit many attitudinal similarities with Current players, and may be more receptive to playing.
- The Current bingo market is small (5%), but Lapsed (12%) and Core Potential (4%) player segments represent a significant possible increase – if they can be persuaded.
    - On the surface, messages about the social aspects of bingo as well as the game’s charitable contributions are most effective at increasing propensity to play: “bingo is a social game that brings people together” was rated strongest among current players, while “proceeds from the games go to charity” was rated as the most convincing message overall.
    - Proposed changes to facilities such as including slot machines, or all facilities having liquor licenses received a more mixed reaction from the general population although individuals responding to the survey did not have the context of upgraded facilities and amenities as is the case of British Columbia.
  - Although a solid majority of Ontarians purchase lottery and scratch ‘n win tickets, a small minority of Ontarians participate in facility-based gaming activities. Nevertheless, the public’s psychographics and attitudes do represent potential alignment with Bingo’s value propositions.
    - Only 21 per cent of respondents indicate that they do not participate in any of the activities they consider to be gambling, most take risks at least “some of the time”, and an overwhelming majority feel that it is important to get out and meet others in social situations and enjoy taking on new challenges.
  - Bingo must overcome significant stigma and negative associations that exist among the general public. However, the public tends to lack engagement with and knowledge about the game, which highlights the need for public education efforts as well as an opportunity for re-positioning bingo.
    - Many Ontarians see players as “old” (22%) and don’t really know how to describe the facilities in which bingo is played (41%); others describe the environment as “barren” (18%). A strong minority feels that the game lacks excitement (41%), and few would describe it as “too complex” (6%).
    - Responses of what to improve about bingo are varied and range from comments about individual participants or the callers to the level of government involvement to the images and venues of bingo themselves;

that there is no one definitive solution suggests the “bingo brand” is not widely known or understood, and Ontarians have not engaged with it enough to suggest changes.

- Next Steps:
  - Determining if changes that have been made to some facilities or the game encourage Current, Lapsed, and Potential players to play Bingo (at all, or more often)
  - Evaluating top-of-mind ideas that were offered by Ontarians in the baseline survey for their propensity to increase play
  - Establishing levels of loyalty and ties to the game among current players
  - Determining level of cross-border (US-Canada) play, and whether US players share similar traits to local Bingo attendees