

# The Future of Canadian Gaming

## Understanding the market for emerging technology-driven gaming opportunities

Consumers face a rapidly-changing world of services, products, and entertainment, driven by the revolutionary pace of technological development. In order to maintain and attract customers, and reverse declining revenues, it is critical that the gaming industry keep a vigilant eye on the horizon for technological innovations that may present new challenges and opportunities.

Our groundbreaking research study illuminates how player behaviour will change in the future. It highlights which new technology-driven gaming opportunities will succeed and fail—and among which player segments. It helps our subscribers get ahead of the curve and take advantage of emergent disruptive technologies, rather than fall victim to them.

### Areas of Investigation

*The Future of Canadian Gaming* will explore and track the awareness, interest, demand, usage, and adoption likelihood for new, emerging technology-driven gaming opportunities. We will also track relevant consumer intent and purchase patterns to better understand and forecast how your current and potential gaming customers' orientations to gaming will evolve over time.

Key areas of exploration will include:

- **Beyond the smartphone:** Will voice-enabled technology and smart wearables be front and centre in the next wave of gaming expansion?
- **Online casino reality:** Will virtual reality casinos be the next wave of home entertainment that will change the gaming world?
- **Hey Google:** How will cloud-based gaming and artificial intelligence play a role in making gaming more convenient and attractive? What function will personal assistants, smart homes, and connected vehicles play in gaming?
- **Lottery line-ups:** Is the in-store experience dead, or is there a better way to enhance the gaming experience in traditional venues?
- **Tweet, share, post:** How can social media attract and influence the next generation of lottery and casino patrons?

### Key Segments to Explore

Our study will place a special focus on analysing results among the following key segments:

- **Current lottery players, casino patrons,** and those who have gambled in past 6 months
- **Millennials** – both those who do and do not participate in gaming, as this demographic segment is critical to the future of the industry
- The non-gaming, low-frequency gaming, and core gaming segments of the **general population**, in order to assess support for government agencies venturing into new technologies and expanding their gaming offerings.



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### Methodology

The study is based upon an online survey conducted twice per year – among a randomly-selected, reliable sample of N=2,000 adult Canadians per wave.

Regional Quota Regime	Canadians
<b>Canada (Total Sample)</b>	<b>2,000</b>
Atlantic Provinces	150
Quebec	350
Ontario	500
Manitoba	150
Saskatchewan	150
Alberta	350
British Columbia	350

### Deliverables and Timing

- PowerPoint-based report of survey findings, including key findings, recommendations, and analysis of results among total base and key segments.
- In-person presentation

Wave 1: Fall 2019	
Survey Fielding & Data Analysis	August
Report Delivered	October
Wave 2: Spring 2020	
Survey Fielding & Data Analysis	February
Report Delivered	April
Wave 3: Fall 2020	
Survey Fielding & Data Analysis	August
Report Delivered	October

### Pricing

As there will be only one wave of research in 2019, the subscription price for 2019 alone is \$10,000. The 2020 subscription price, for two waves of research, is \$20,000. Subscribers who commit to all 3 waves in 2019 and 2020 pay a discounted price of \$27,000.

In addition to the annual subscription, subscribers can **purchase proprietary omnibus questions**. Pollara will design custom questions in consultation with subscribers. Your proprietary omnibus questions and results will only be shared with you.

Subscribers can also purchase increased samples. Pricing for provincial booster samples is listed below. Pricing for booster samples among demographic or user segments will be based on incidence.

Custom Closed-Ended Questions	\$800 each
Custom Open-Ended Questions	\$1,200 each
Booster samples, across 2 waves	\$1,500 per n=100

### About Pollara

Since 1980, Pollara Strategic Insights has provided our clients with what they need: deep understanding, bulletproof accuracy, actionable recommendations, and insightful ongoing counsel. Pollara is home to one of Canada's leading lottery and gaming research practices. Our team's extensive experience in the sector includes studies focused on issues management, feedback, competitive product analysis, mobile and internet gaming, customer experience impact, and game sales forecasting. We have conducted research on this subject for all the major gaming regulators in Canada as well as several large gaming operators throughout North America. Rooted in our deep subject matter expertise, we provide our clients the most effective research approaches and superior interpretation and advice.



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