



# Gaming XYZ



**X**

**Y**

**Z**

**37-52**

**25-36**

**18-24**

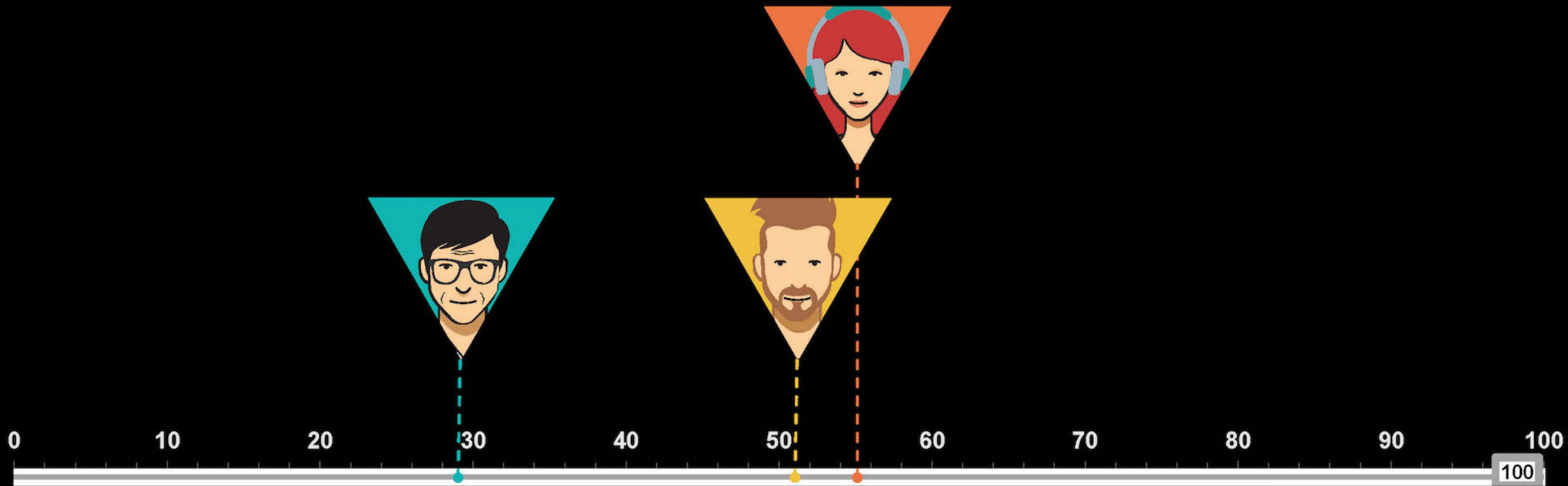


Is this another Millennial  
presentation?

**No.**

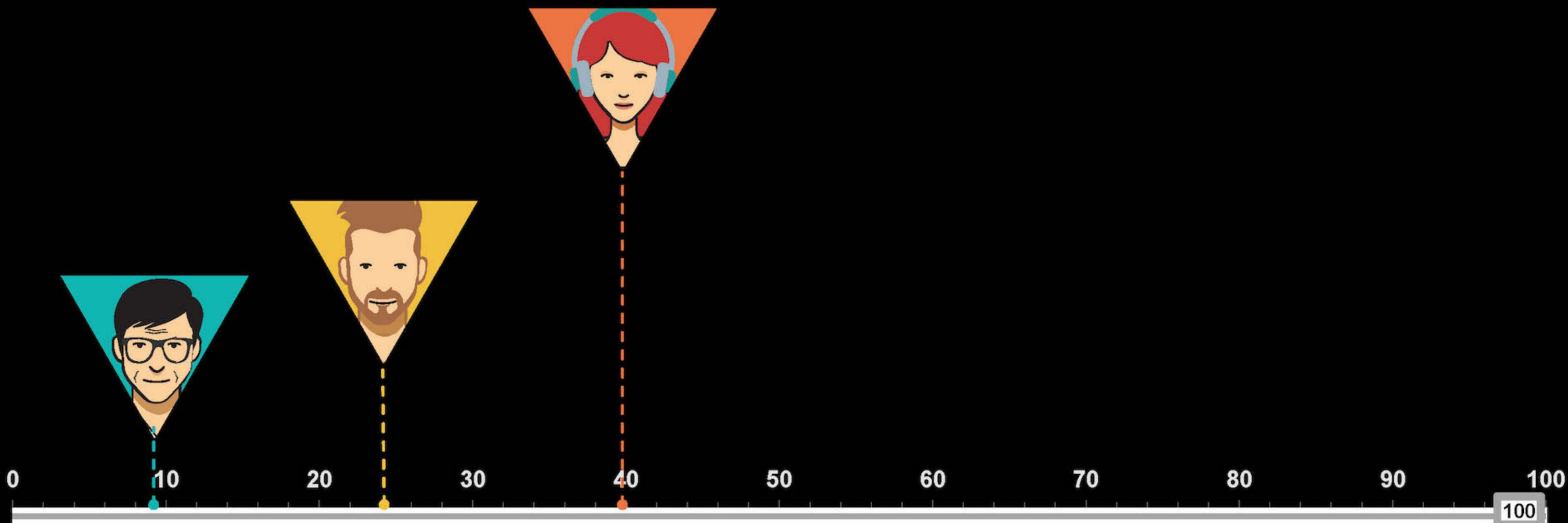
A bit about Under 53's general views on life, technology, etc.

**Gen X** sets itself apart from the two other generations when it comes to **technology and social media**



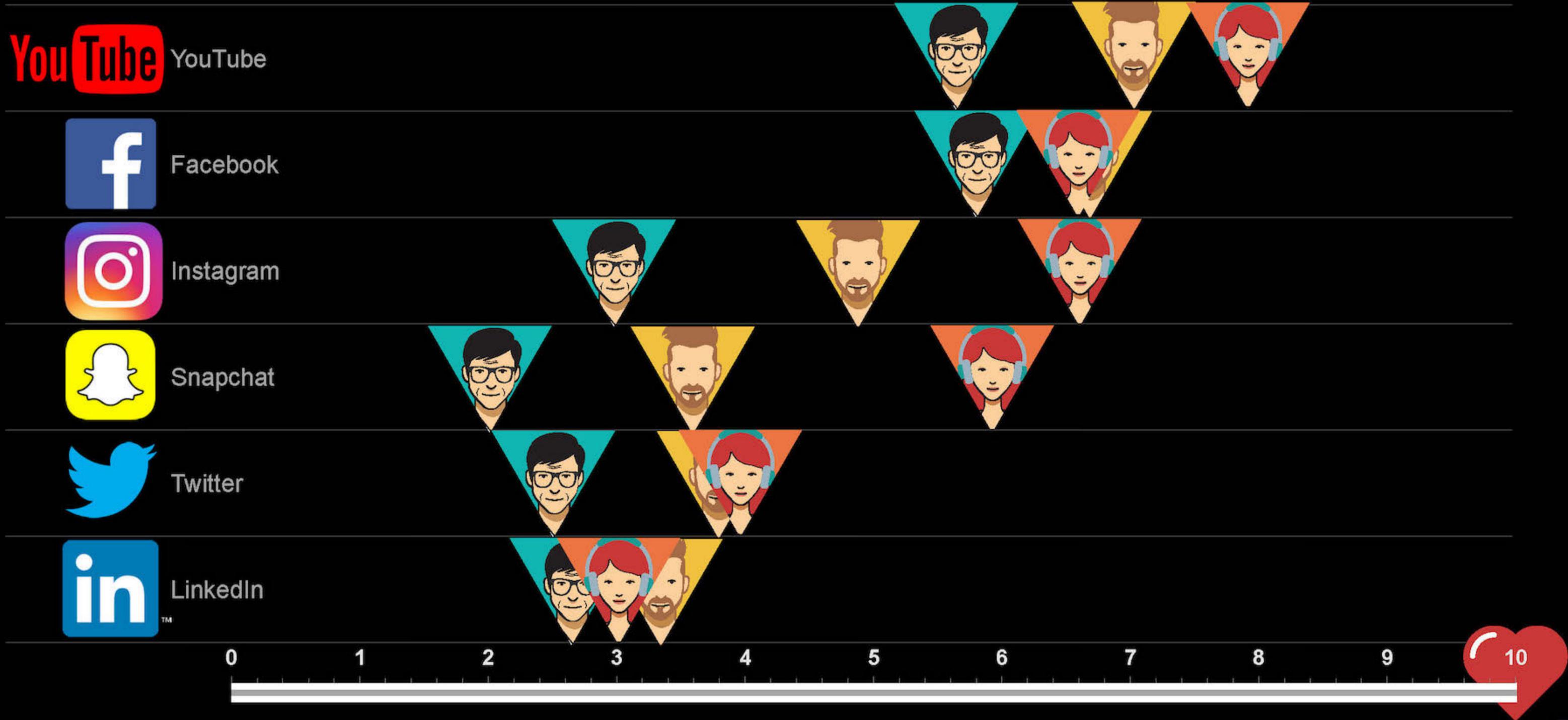
Technology makes my life more convenient

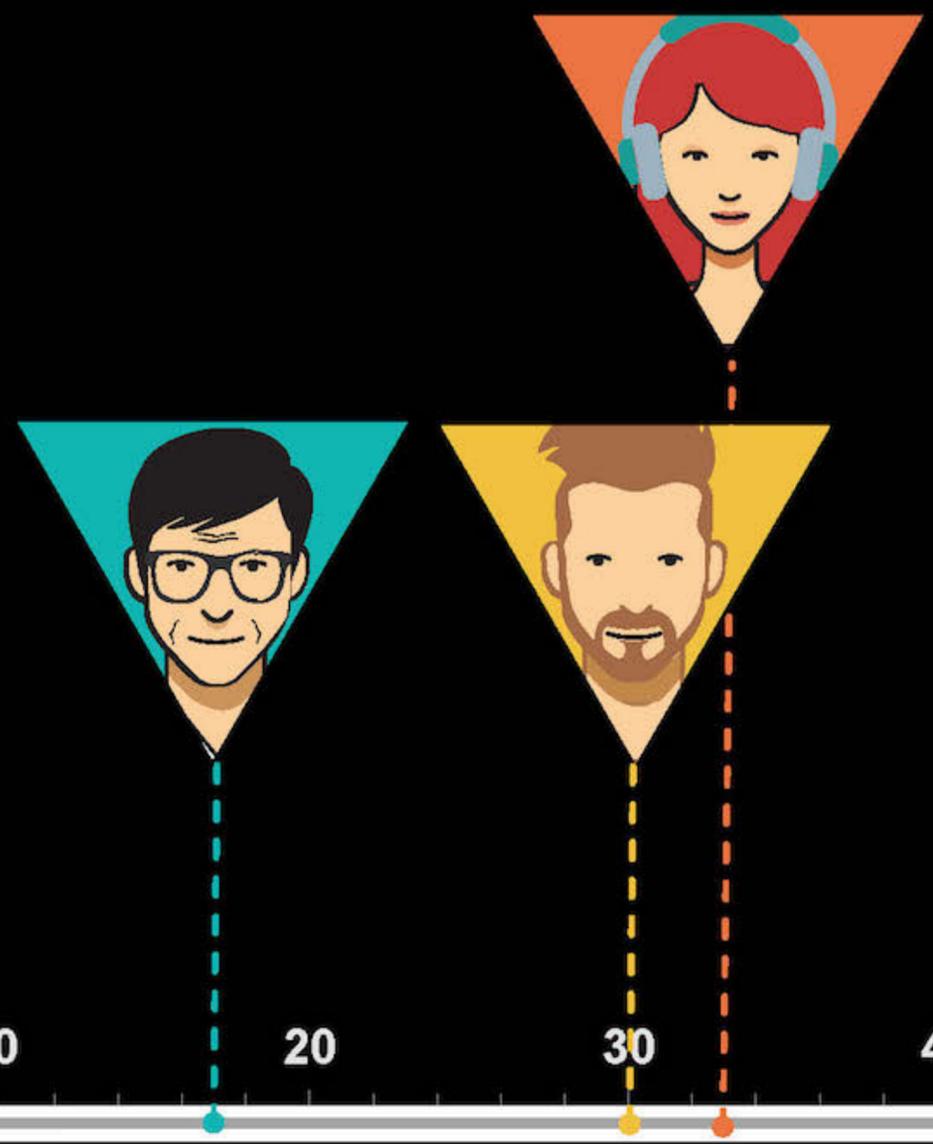
**Gen X** sets itself apart from the two other generations when it comes to **technology and social media**



Social media is the primary way I communicate with friends

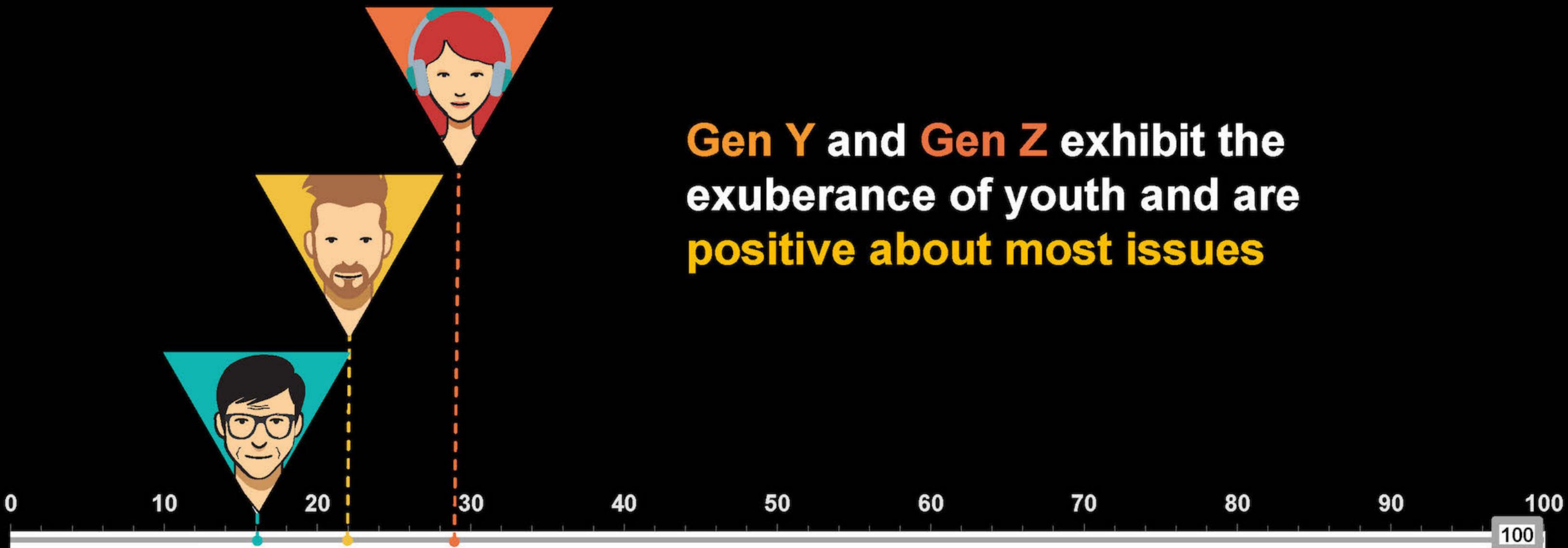
# How close are you to...





**Gen Y and Gen Z exhibit the exuberance of youth and are positive about most issues**

Sometimes I go shopping just for fun



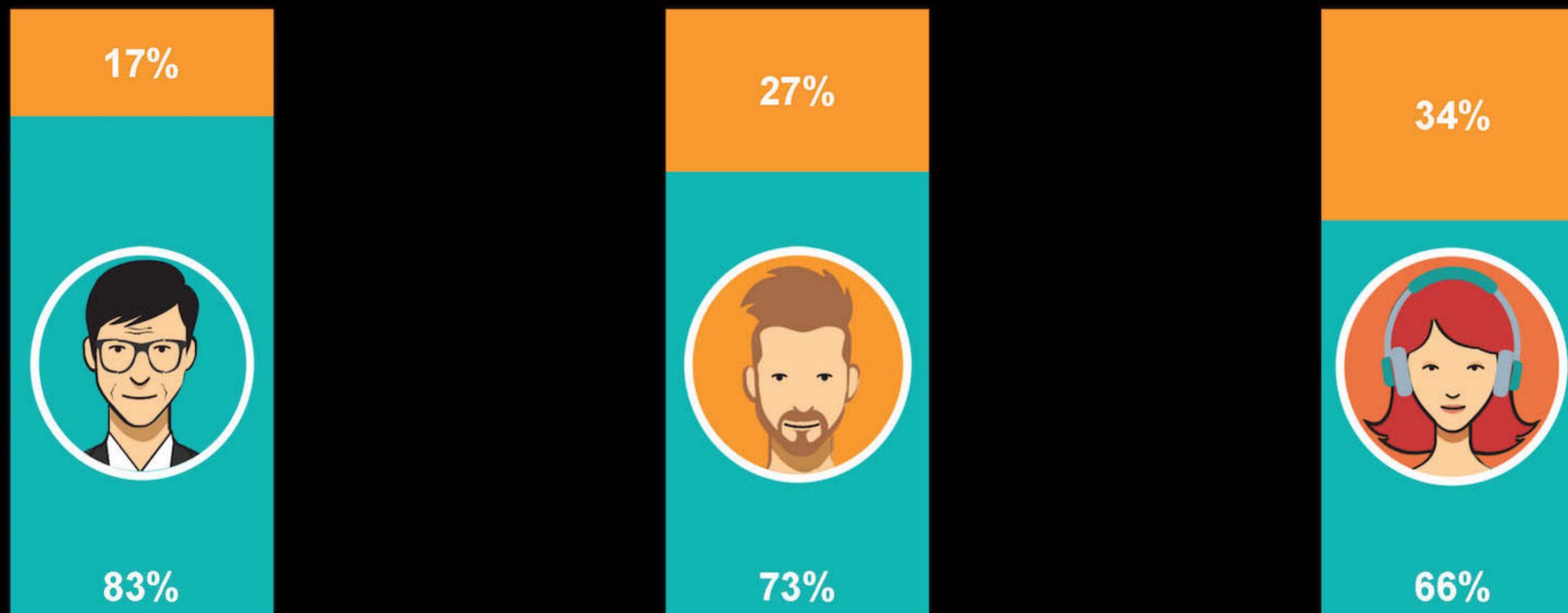
**Gen Y and Gen Z exhibit the exuberance of youth and are positive about most issues**

Life should be enjoyed today without worrying about the future

**Let's take a peek at how  
they view entertainment and  
how they spend.**

# Share of spend on **entertainment skews higher** for Gen Z

Entertainment  
Necessities



## Entertainment choices reflect a combination of **financial situation and personal choice**

**Gen X** are most likely to participate in a **family-oriented entertainment activities** such as dining out, watching cable or PVR TV, or gardening

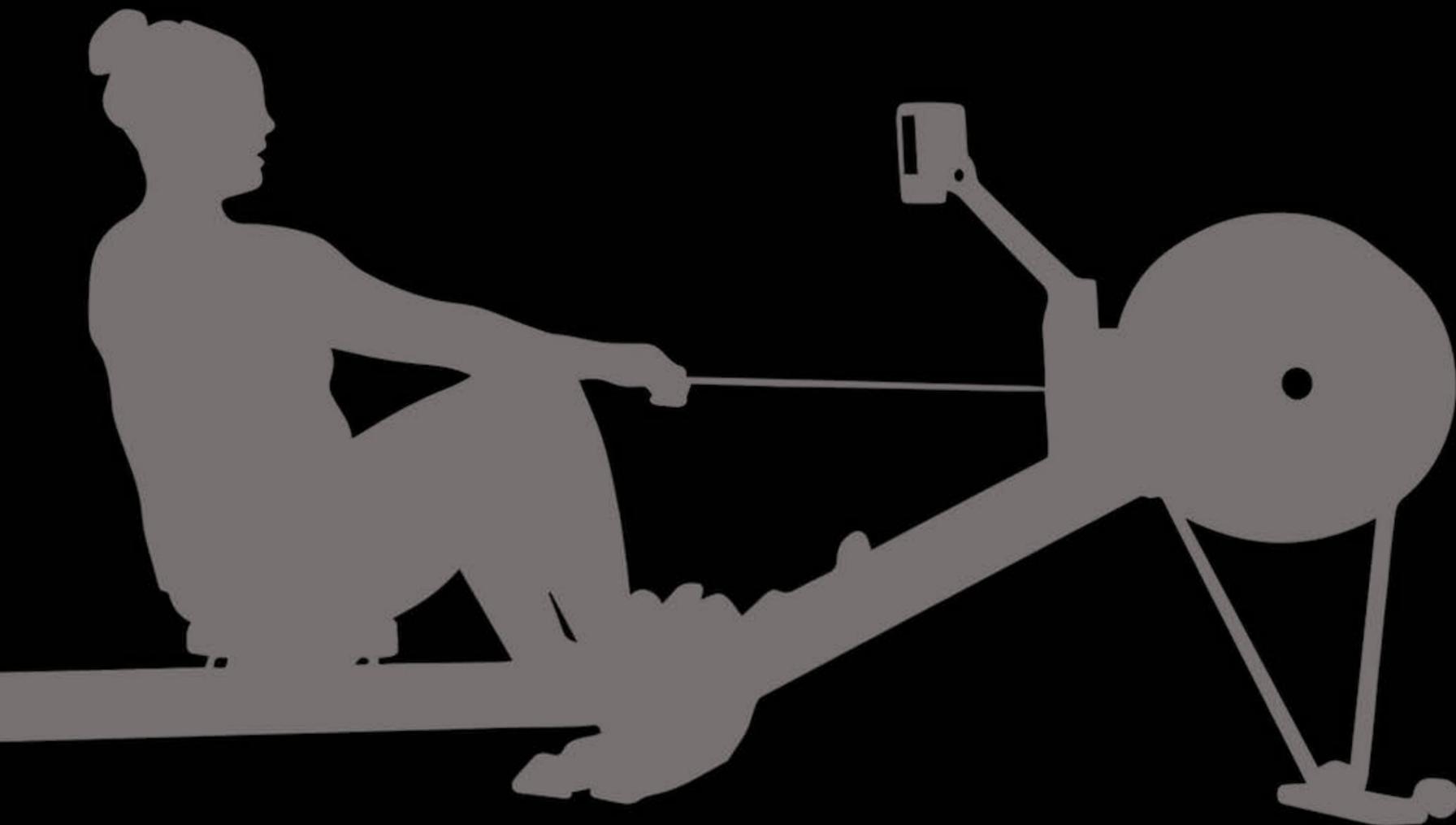


They also indulge in a few personal entertainment choices such as **buying a draw game ticket or an instant scratch ticket**

## Entertainment choices reflect a combination of financial situation and personal choice



Gen Y participate in the full spectrum of **social entertainment activities** such as dining out, patronizing a bar, pub, and invest in their wellness



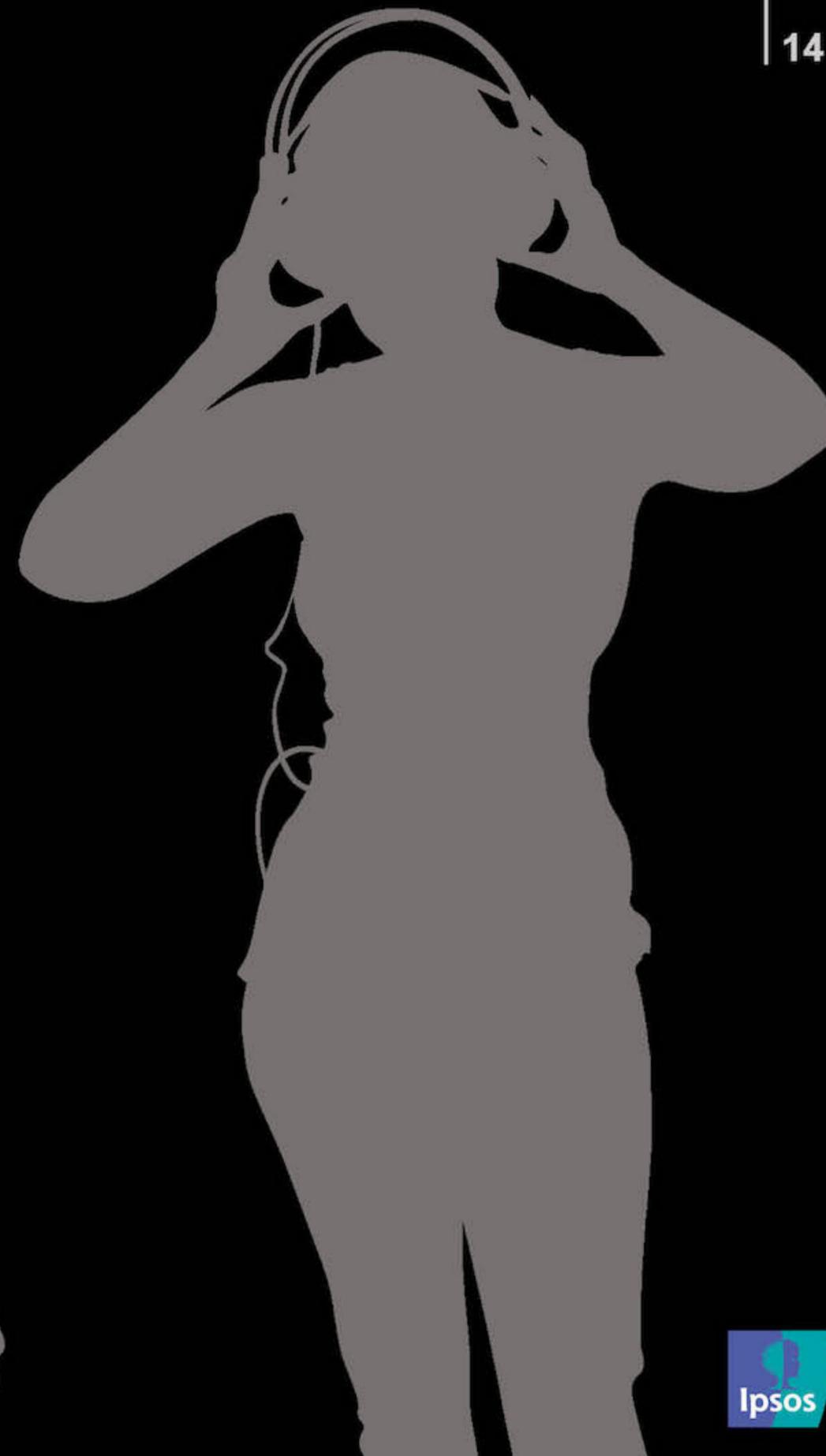
They are also the most likely generation to participate in **online gambling** and **Sports Betting**





**Gen Z** indulge in **free or affordable entertainment** such as:

- Playing or listening music
- Watching TV via online streaming subscriptions
- Playing free games on their mobile phone
- Paying to download games for PC and video console.



**Touching on loyalty  
programs and payment  
methods**

# Gen Y has the most affiliations to a loyalty program, followed by Gen Z which is heavy in grocery and travel.



5

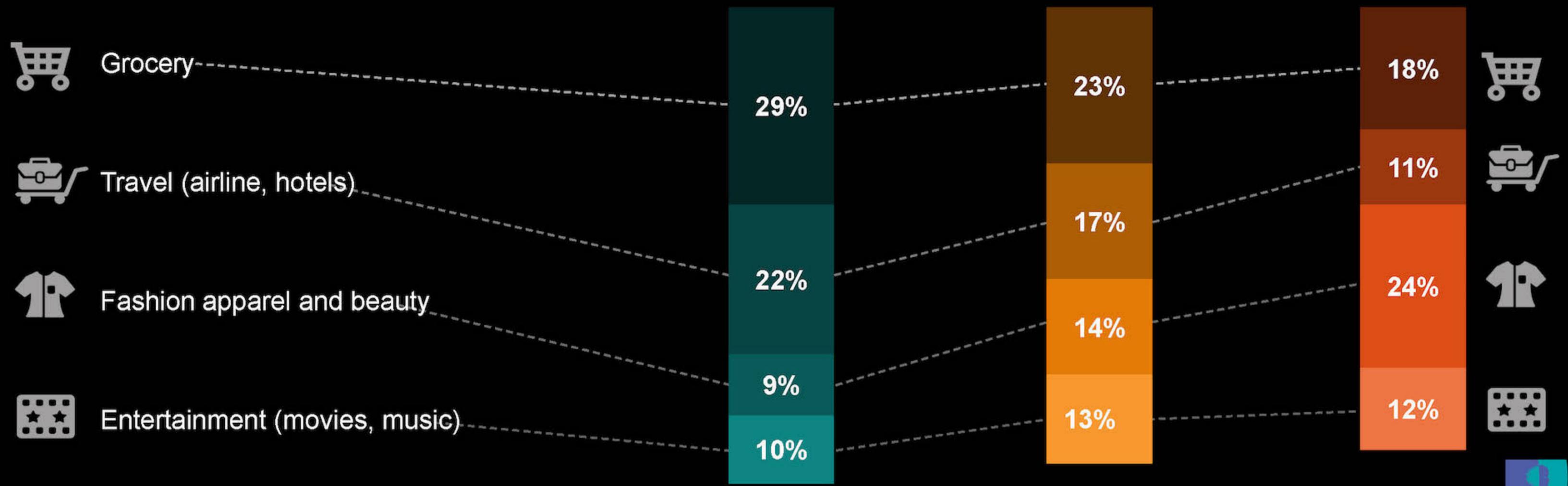


8



6

Average number of loyalty programs



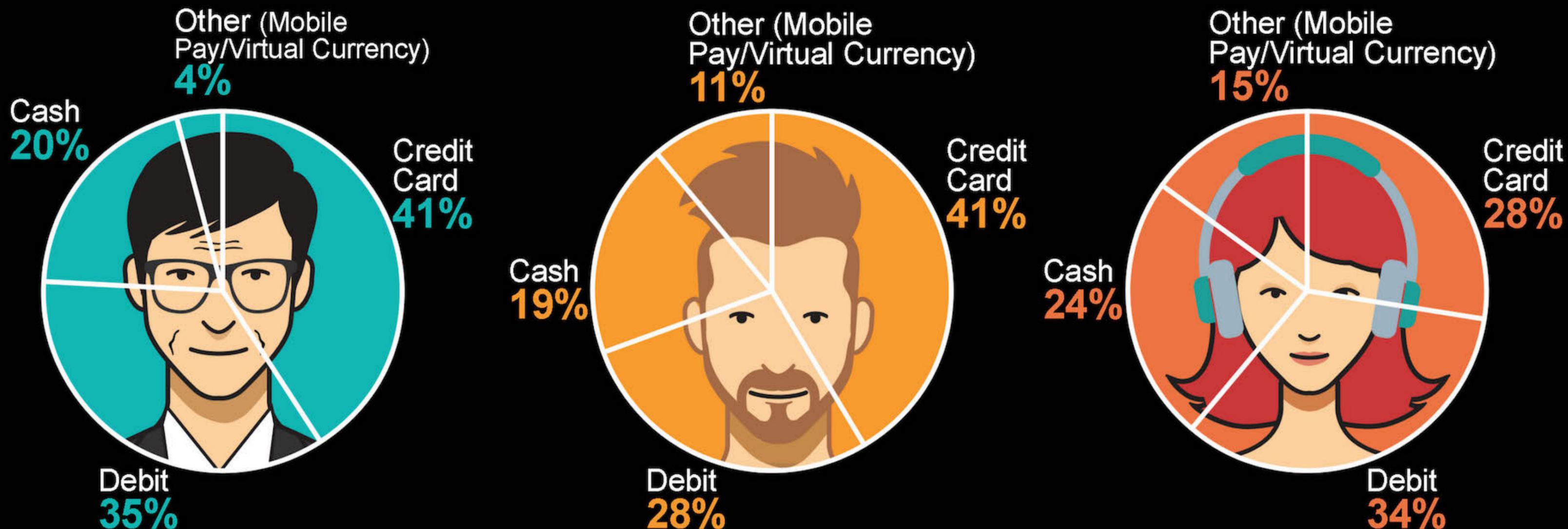
A stylized illustration of a hand holding a stack of cash, rendered in a light gray color against a dark background.

Cash is king when it comes to what people want from loyalty programs, especially **Gen Z...**

But **Gen Z** is also more open to experience-based prizes or discounts on supplementary purchases

A series of light gray silhouettes of people holding drinks, arranged in a line and connected by a thin line, suggesting a social gathering or a line of people.

## Credit and Debit dominates payment methods...



... but **Mobile Pay and Virtual Currency** are growing in popularity among **Gen Y** and **Gen Z**

**A few interesting tidbits on  
bricks & mortar shopping**

**Brick and Mortar is here to stay, but the convenience store is less popular with Gen Y and Gen Z**



**Gen Y** and **Gen Z** grew up shopping online and technology like Artificial Intelligence will only make this more prevalent.



# While the **retail store** is still the main channel for gambling consumption across the 3 generations...

Among Gamblers (including lottery)



At a retail store

94%

87%

78%



At a casino, bar, pub or restaurant

39%

47%

48%



Online

24%

33%

26%

...the **hospitality** channel is gaining greater relevance with **Gen Y** and **Gen Z**

**What gambling activities  
have momentum in the  
near-future?**

**We asked respondents 2 questions...**

- 1. Do you participate in (insert gaming activity)?**
- 2. Do you feel this (insert gaming activity) is gaining or losing popularity?**

**And then we looked at the gap between the two measures to determine the future momentum.**

# With online gaming leading the charge, **there is positive growth potential in the future for the new generation of gaming**



PC or  
video  
console  
game

Wagering  
online

Paid game  
on  
mobile  
phone

Sports  
betting

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# With online gaming leading the charge, **there is positive growth potential in the future for the new generation of gaming**



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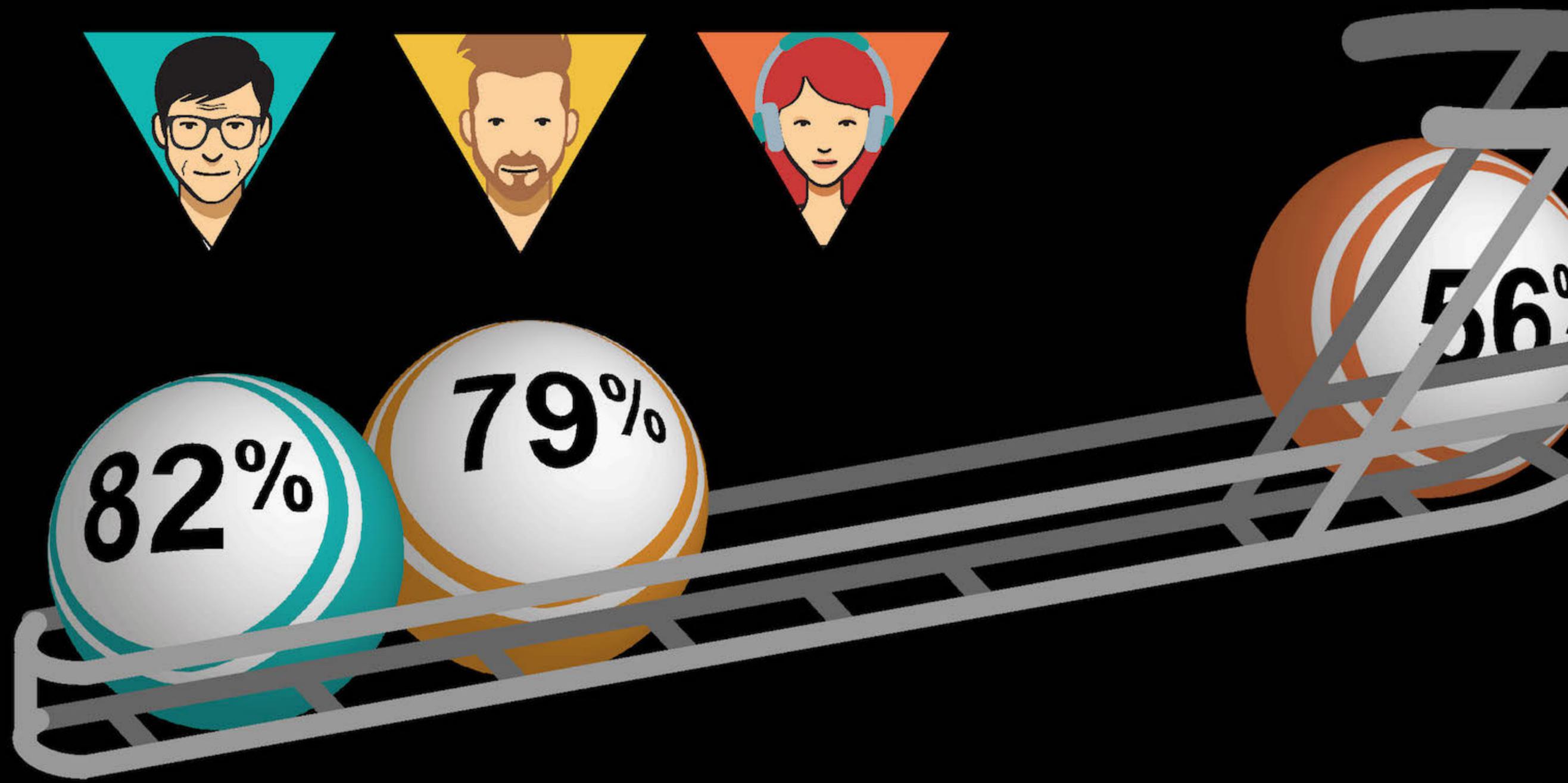
Sports  
betting

Paid game on  
mobile phone

# Overall gambling participation

Including Lottery and all other forms

Gambling (all forms) is vibrant in Canada regardless of generation, but **Gen X** and **Gen Y** clearly lead the way.



Lottery games are the main drivers of participation with **casino participation following** – about half that of lottery for each generation.

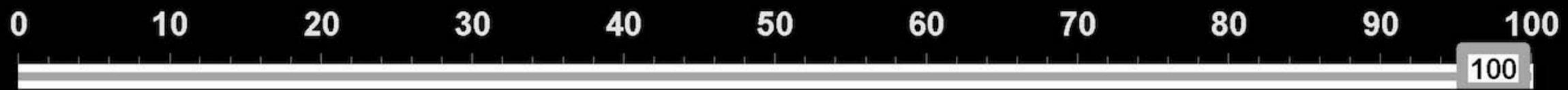
Draw game lottery ticket



Instant scratch ticket



Casino, gaming center, or bingo hall



# Online leads second tier gambling activities and all generations are comparable with Gen Y leading the way.

Wagering money online



Sports Betting



Horseracing



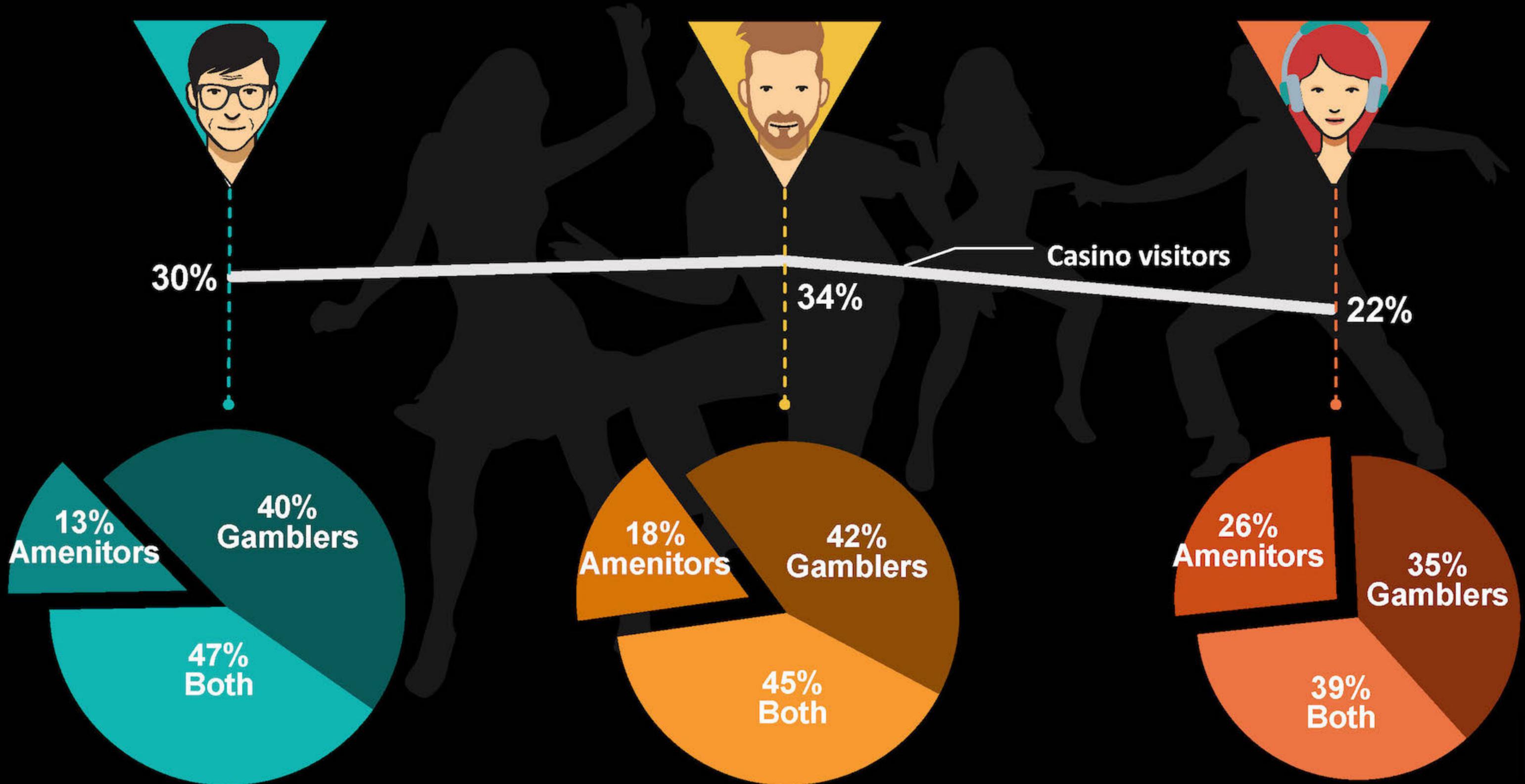
VLTs



# Let's dive into casino gambling specifics

And check out what barriers exist

# Casino visitation and gambling participation is softer among Gen Z are more **Amenity** focused.



The top motivations for each generation to visit a **casino is distinct across the 3 generations**, but is consistent with what each generation seeks across other elements in their world.



### Gen X

Thrill of winning and to win a little bit of money and dreaming about it.



### Gen Y

Entertainment value of casino games and social amenities

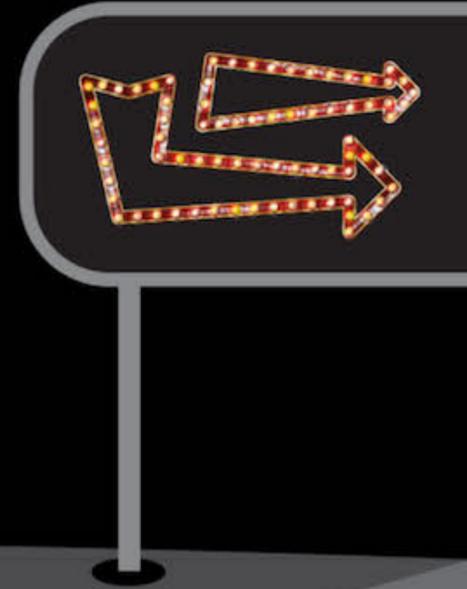


### Gen Z

Thrill of winning and value the benefit of socializing



Many **demonstrate enthusiasm for casino gambling**, but need barriers to be lowered in order to increase participation



Risk losing my money

Spend my money on other forms of entertainment

Besides free cash, each generation is more likely to be **motivated to visit a casino by incentives for activities they don't typically utilize**

\$50 of free chips



A free night in hotel



Free tickets to a show



Each generation is more likely to be **motivated to visit**  
**by incentives for activities they don't typically utilize**

A free meal



\$50 voucher to  
spend on non-  
gambling  
amenities



In addition to primary barriers of financial risk averseness, which all generations face, **Gen Z** face secondary practical and logistical barriers that other generations do not.

I DON'T HAVE FUN AT THE CASINOS

I DON'T LIKE THE OVERALL ENVIRONMENT

THE ENTERTAINMENT VALUE IS TOO UNPREDICTABLE

I DON'T KNOW HOW TO PLAY CASINO GAMES



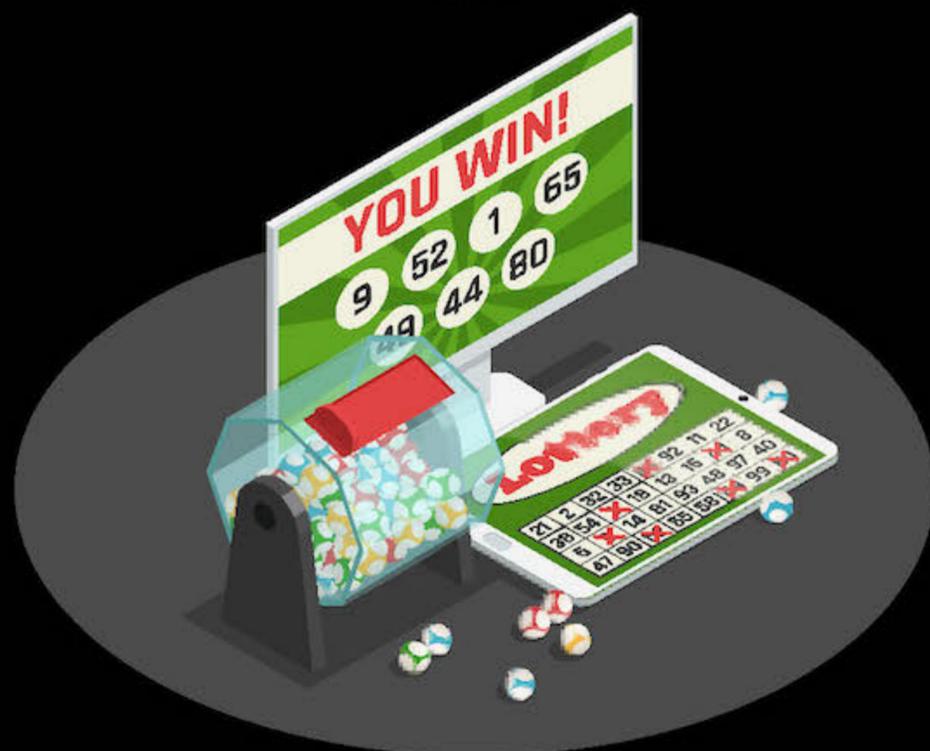
# **We can't ignore online gambling**

And oh yeah, it has barriers too

Online gambling constitutes a minor share of the gambling landscape, its popularity is rising among Gen Y, where it is most prevalent



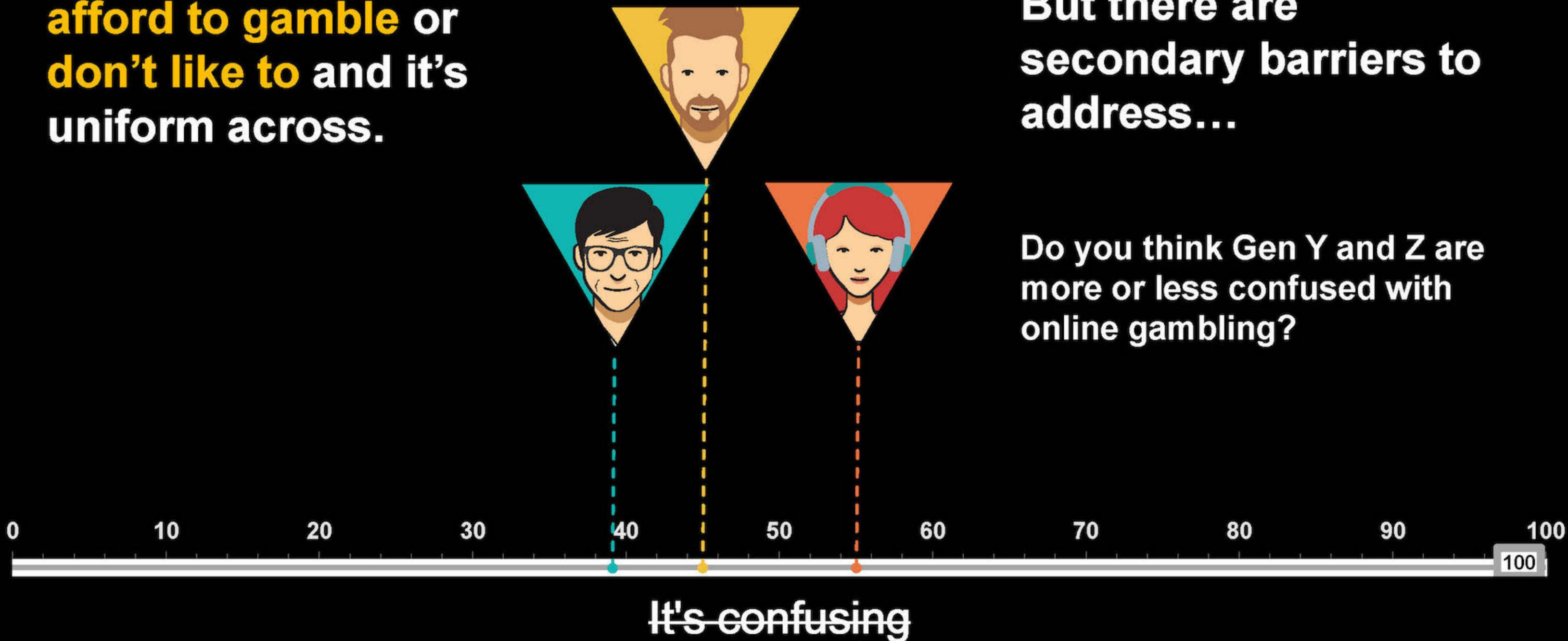
# Participation in the various types of online gambling reflect the nuances of gambling preferences of the generations



Top 2 barriers, **can't afford to gamble** or **don't like to** and it's uniform across.

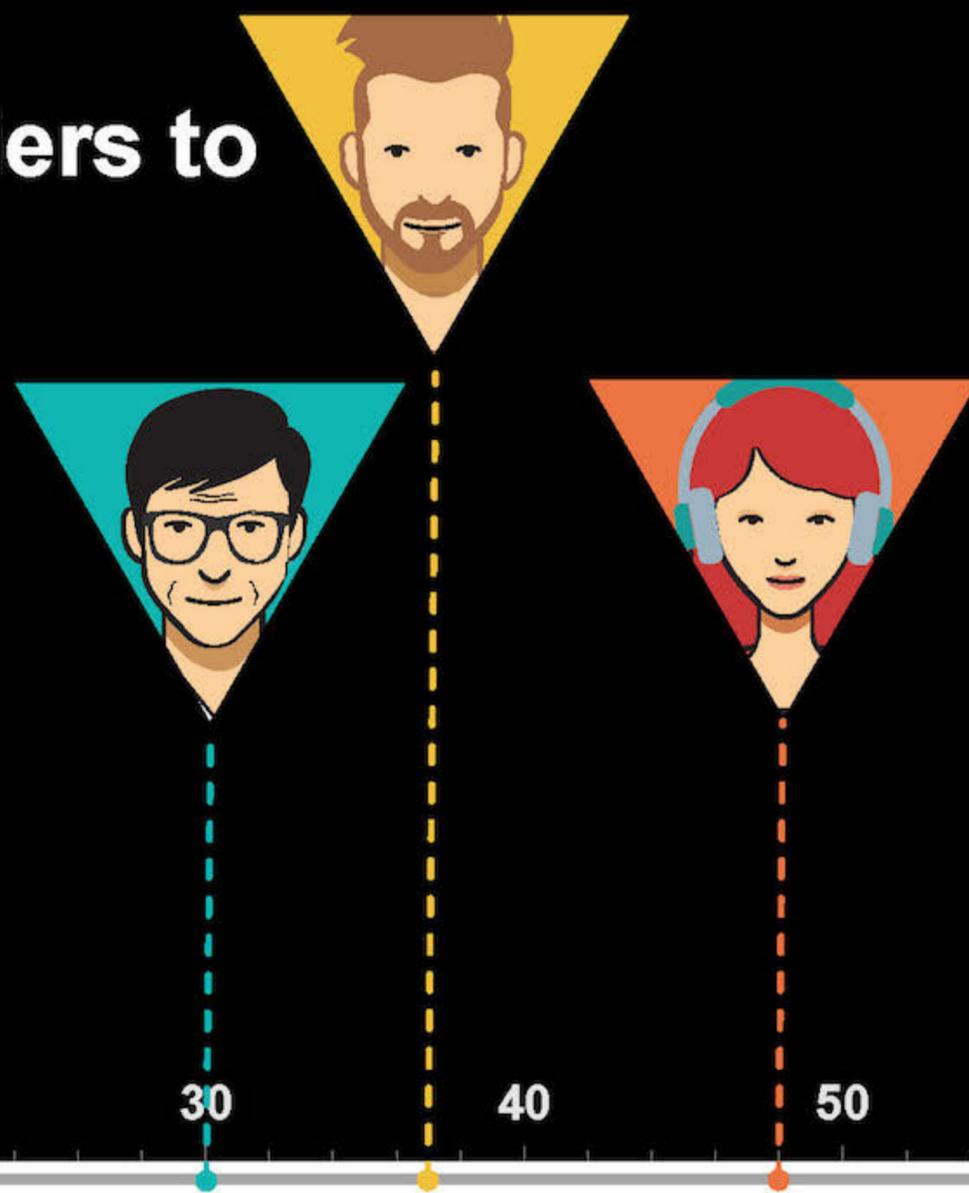
But there are secondary barriers to address...

Do you think Gen Y and Z are more or less confused with online gambling?



Gambling activities are confusing

But there are  
secondary barriers to  
address...



I wasn't aware of the government regulated gambling website in my province

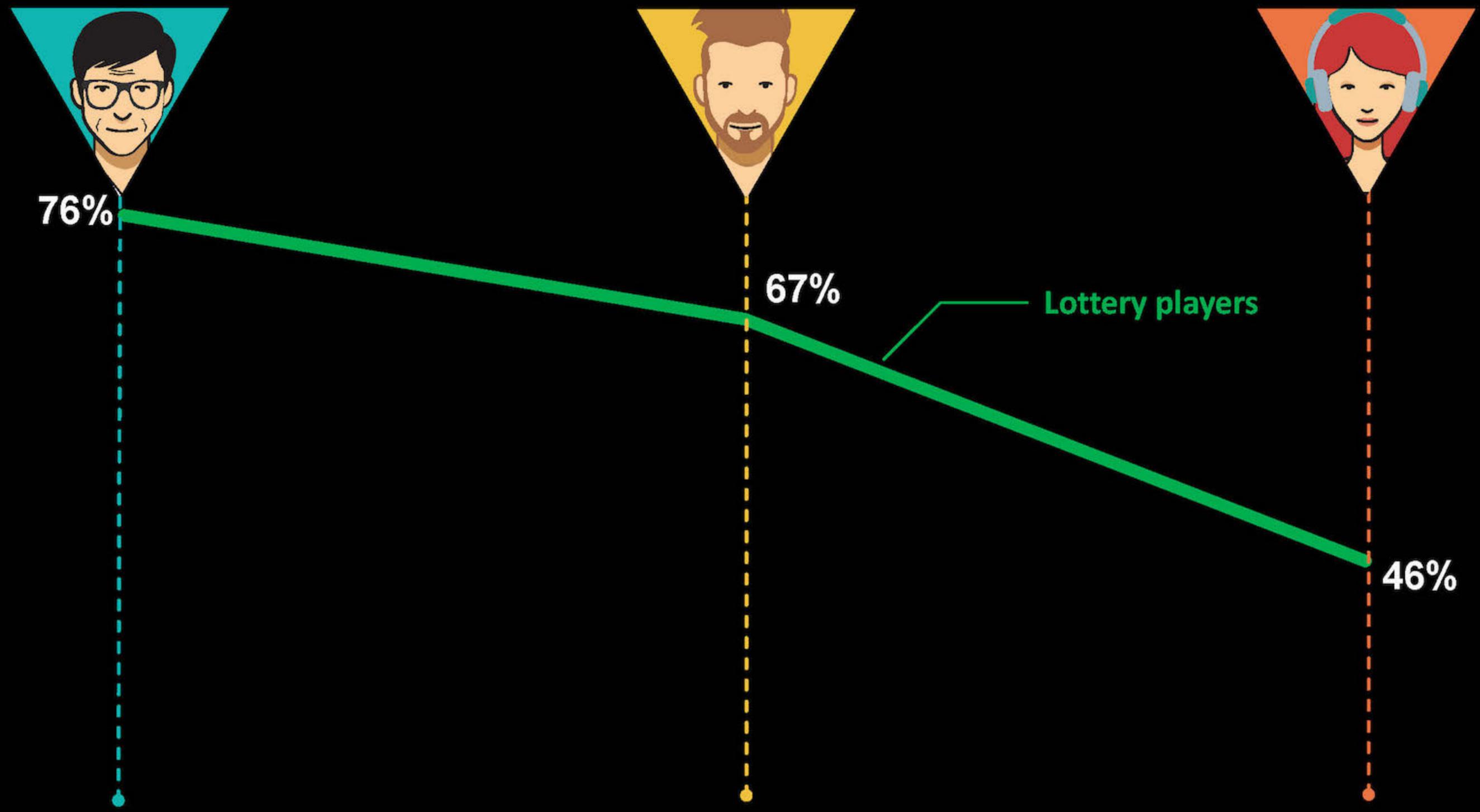
**But there are  
secondary barriers to  
address...**



# Let's wrap up with a quick look at lotteries

Momentum may not be what you think it is!

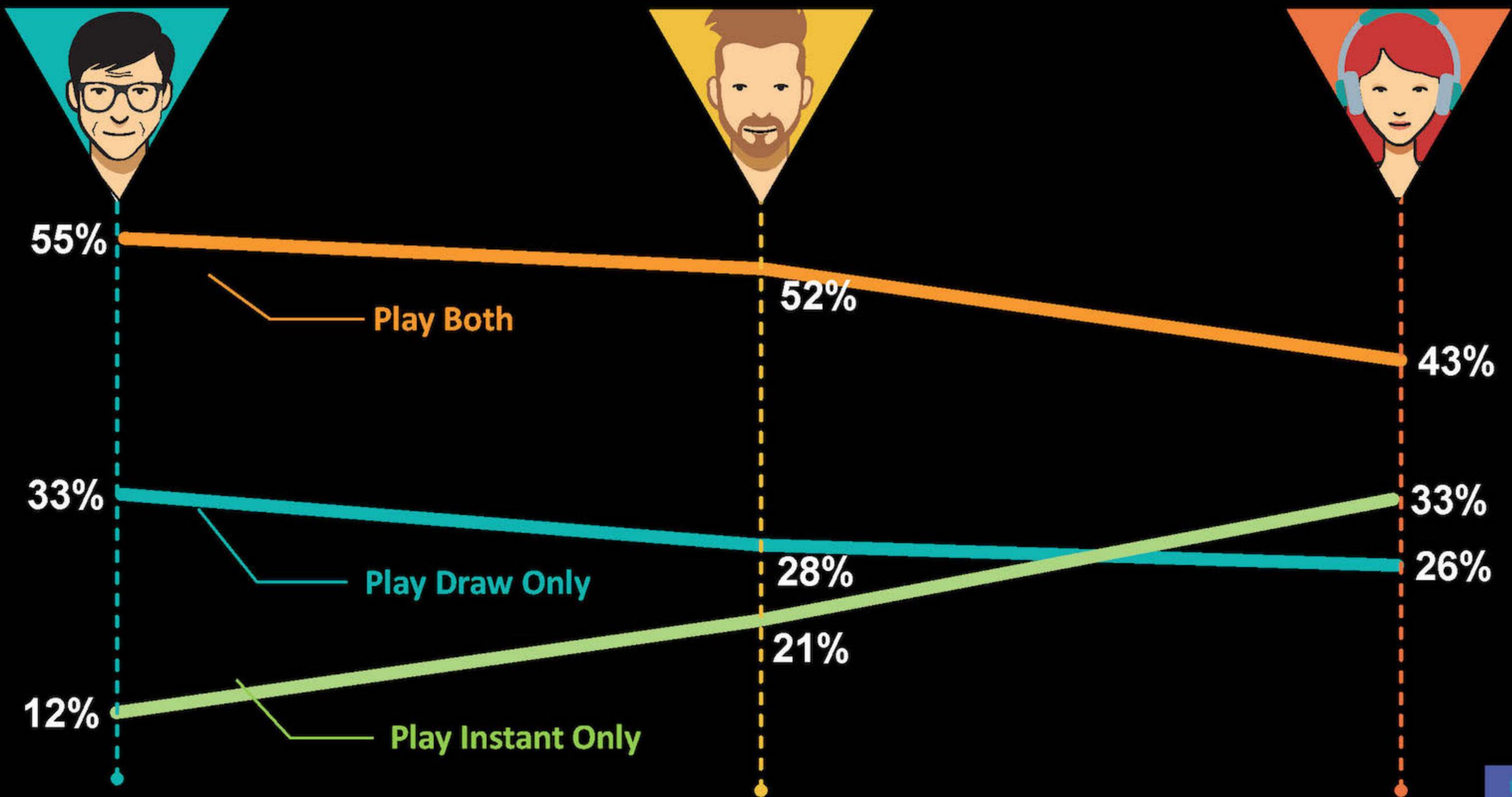
Lottery participation is greatest among **Gen X**, slightly lower for **Gen Y**, then drops off for **Gen Z**.



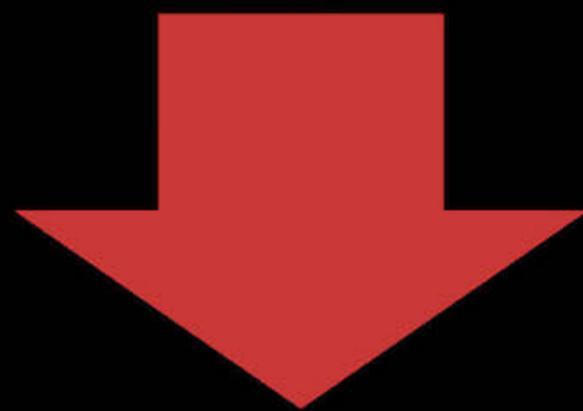
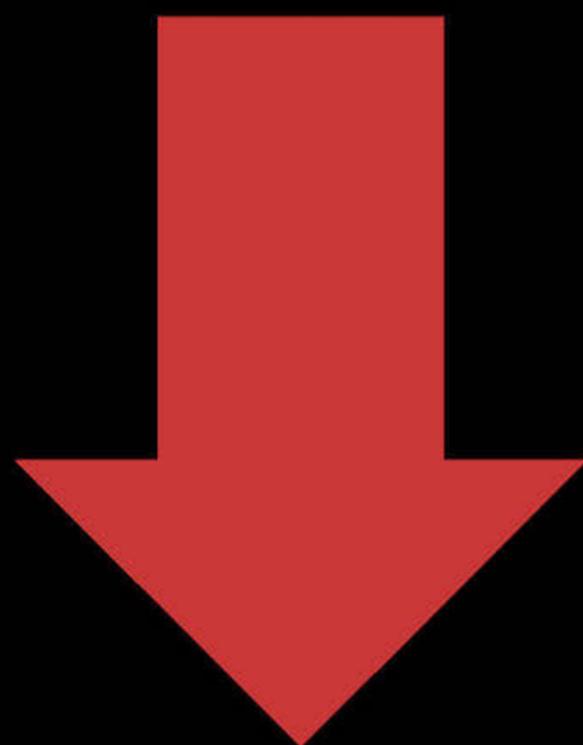
# Lottery play is segmented and driven by needs by each of the generations

Gen X mostly buys draw games while with Gen Z leaning heavier towards playing instants solo.

Gen Y is more balanced.



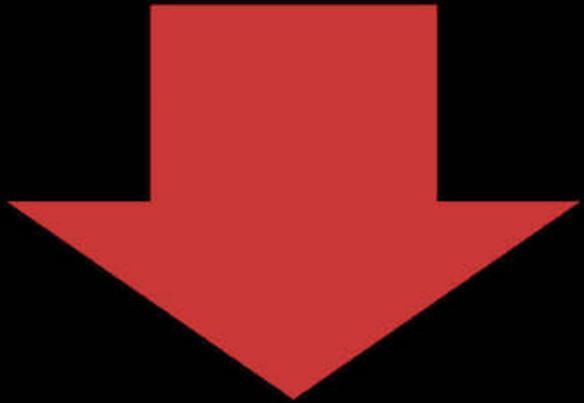
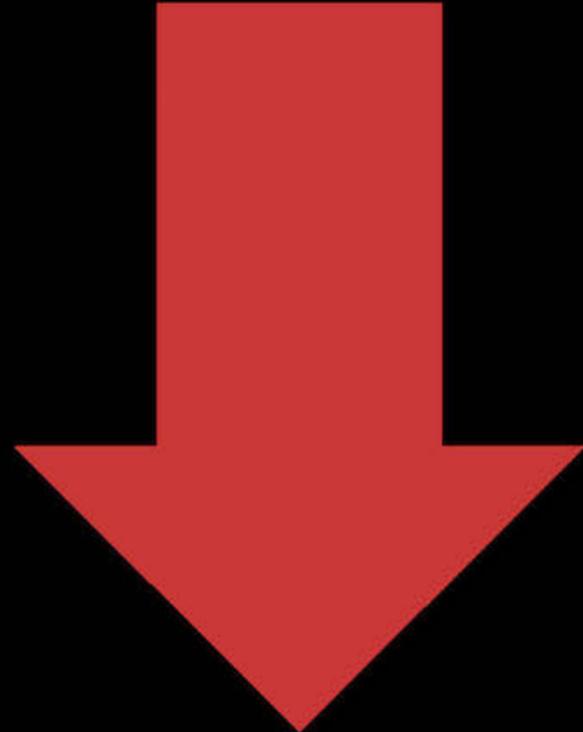
Lottery participation is strong, but popularity in traditional games like Draw Games are on the decline for **Gen X** and **Gen Y**.



**Draw Game  
Momentum**



The same is true for Instant Scratch Games.



**Instant Scratch  
Games Momentum**



**Alright, let's call it a day and  
leave you with a few take-  
aways**

**How does technology hold  
the key?**

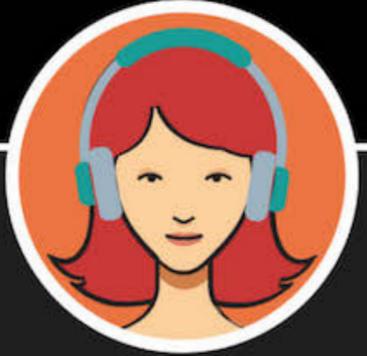


**Millennial is not just one type of person.**

**While there are clear indications that younger generations are different, there are many cases where they are similar.**

CONSIDER

**Challenge your vendors, marketers, product developers to be more specific around the age implications.**



The obvious differences regarding tech and social from Gen X to the more digital natives Gen Z are staggering.



Product Portfolios need to include games that are inviting, fun, social, and inclusive to appeal to groups in the younger generations.

Can't forget the status quo...



**The positive trend in online and sports gambling is real. Even if it's regulated the competition is fierce.**

**If executed right, casinos can make a comeback with younger generations.**



**The casino floor will likely always be in flux.**



**While there are barriers to participating in casino and online gambling, and lotteries, many of these can be overcome with smart tweaks to marketing, messaging, and product offer.**



**Promote intriguing, fun, interactive educational experience**  
**But don't forget about your traditional communications**



Thank you.

If you want to learn more, come visit our booth.



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