Lottery Researchers Share Market Insights and New Methodologies in Madrid

The convergence of market research and Business Intelligence data emerged as a hot topic when market research professionals from 10 lotteries gathered recently for IGT's second **International Gaming Insights Exchange**.

Market research has long been a critical tool for lotteries, informing game development, business decision making, the player experience, and more. In recent years, lottery research professionals have had the opportunity to attend a European-based forum to meet with peers and share their challenges and successes along with the methodologies central to their work. The second International Gaming Insights Exchange, hosted by IGT in Madrid on October 17-18, 2018, is an outgrowth of a similar event held by IGT in North America annually since 2009. Together, the two events provide access for a broad range of lottery-customer research professionals to discuss their research programs and challenges in a collaborative setting.

Global Gaming Insights Exchange 2018

At exchange events, "each lottery delegate gives a presentation geared to the interests of fellow research colleagues. We also invite keynote speakers who bring their perspectives to the table, whether from inside or outside the gaming market," explains **Pedro Lopez**, Senior Marketing Manager, IGT, who organized the Madrid event with IGT's **Gerard Caro**, Senior Director, Marketing Insights. Notes Caro, "We try to bring what's new in the field to the attention of attendees. Invited speakers, as well as the delegates, may be using new technologies or methodologies that are leading edge in market research but haven't been used yet by other lottery researchers. If it's happening in other markets, sooner or later lotteries will want to look at it."

Exchanging Ideas to Generate Growth

Among those presenting at the recent conference were market researchers from Spain's **Sociedad Estatal Loterías y Apuestas del Estado**, who shared insights about what has made the Lottery's annual El Gordo draw game the biggest in the world, and how it has become embedded in the nation's culture. Belgium's **Loterie Nationale** offered a case study on how researchers brought together two classic market segmentation approaches to create one comprehensive customer view. Poland's **Totalizator Sportowy** discussed using instant-ticket prize claim rates as a tool to understand elements of ticket design. U.K. operator **Camelot** reported on developments in its use of data to create profiles of digital lottery players, and how to use different sources of information to generate growth from these insights. Czech Republic operator **Sazka** shared its innovation process, rooted in consumer insights, and France's **Française des Jeux** showed how it measures the player experience and identifies pain points that could be resolved to enhance that experience.

Research professionals from IGT's Insights group also shared aspects of their recent work on behalf of lottery customers. Pedro Lopez presented a case study on how IGT used conjoint-analysis techniques to assist the **Colombian Lottery** with game portfolio development and how consumer research contributed to the successful launch of **Lottomatica's** MillionDay draw game in Italy. Gerard Caro shared details about a video-ethnography protocol new to lottery research, along with findings from the newest IGT global player research study, "Attracting New Players." And **Ailsa McKnight**, Senior Director, Customer Understanding and Player Insight, discussed broad consumer trends that are likely to have an impact on the lottery industry, offering ideas for lotteries to align with consumers' changing expectations.

Marketing research professionals from 10 lotteries and 3 outside industries share insights and methodologies at the International Gaming Insights Exchange hosted by IGT, October 17-18, 2018, Madrid, Spain.

Attendees at IGT's 2018 International Gaming Insights Exchange in Madrid

Macarena Estévez from consulting firm Conento discussed how marketing analytics are growing in importance, and how traditional market research departments are harnessing Business Intelligence to deliver a richer and more colorful picture of markets and consumer behavior.

When Research and Analytics Meet

One of the hot topics to emerge from the two-day workshop was the convergence of traditional market research and analytics, as reflected in the presentations from BBVA, Conento, and many of the delegates. While lotteries will continue to rely on traditional market research to get insights directly from the market, they are increasingly engaged with everything related to analytics as new technologies open possibilities to gather and process data.

Keynotes Bring Outside Perspective

The topics for each Insight Exchange are chosen by participants, and keynote speakers offer additional or related subjects worthy of consideration from a lottery perspective. "We're always thinking of our customers' interests, and we try to identify speakers who will bring something thought-provoking to the conversation," says Lopez.

Keynote speaker **Raúl Quintana** from BeMyEye, Europe's leading provider of crowdsourced in-store data, discussed how the firm's one million on-demand data gatherers (individuals known as "Eyes") operate in 21 countries to collect rich causal data on sales execution in large supermarkets, independent grocers, and specialty stores. "Crowdsourcing tools are part of an overall trend that's already offering interesting options for the lottery market, such as crowdsourced retail audits," notes Lopez.

Santiago de la Asunción from BBVA, the second largest global bank in Spain, shared insights on the bank's shift to in-house market research. "What BBVA is doing right now is quite new in the market," observes Lopez. With the advances in data-collection technology, many companies now have the data to create a Business Intelligence unit, culling information from different areas within the organization and using their own professionals to gather and structure the insights.

"Lotteries realize how rich they are in terms of data," says Caro, "It's an asset that can be used along with market research to gain insights and better understand their customers. This convergence is likely to influence the way marketing insight departments will be shaped."

"A common thread in the Americas and the International Exchanges is that attendees have jobs that entail sales analytics in addition to marketing insights," Caro says. "We're all learning what kind of data each side can use from the other. The subject is showing up organically, and it's a key area for development in future workshops."

No research-themed event would be complete without some research of its own, and in a survey of delegates, the exchange of "good conversation and new ideas" and "the opportunity to meet other market researchers from the lottery industry" were cited as highlights.

IGT plans to host research exchange events in both the International region and North America in 2019. To learn more, contact: Pedro.Lopez2@IGT.com or Gerard.Caro@IGT.com

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