

The player profile in Spain's online gambling market 2014

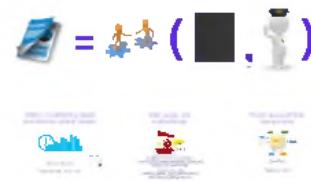
A report by



1. A study on consumer trends!



2. Why it has been possible



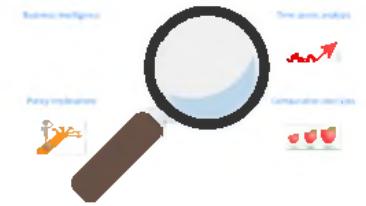
3. Main highlights



4. Delving deeper...



5. Uses and implications



The player profile in Spain's online gambling market 2014

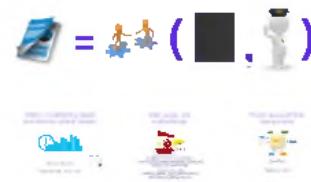
A report by



1. A study on consumer trends!



2. Why it has been possible



3. Main highlights



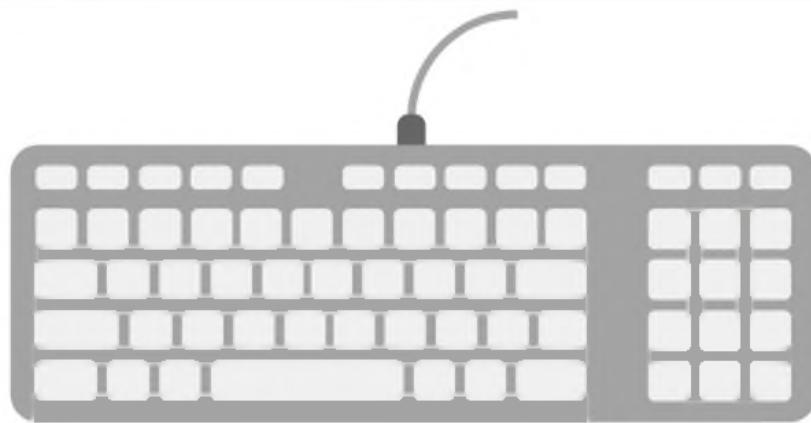
4. Delving deeper...



5. Uses and implications



1. A study on consumer trends!



Market reports

...normally supply-oriented

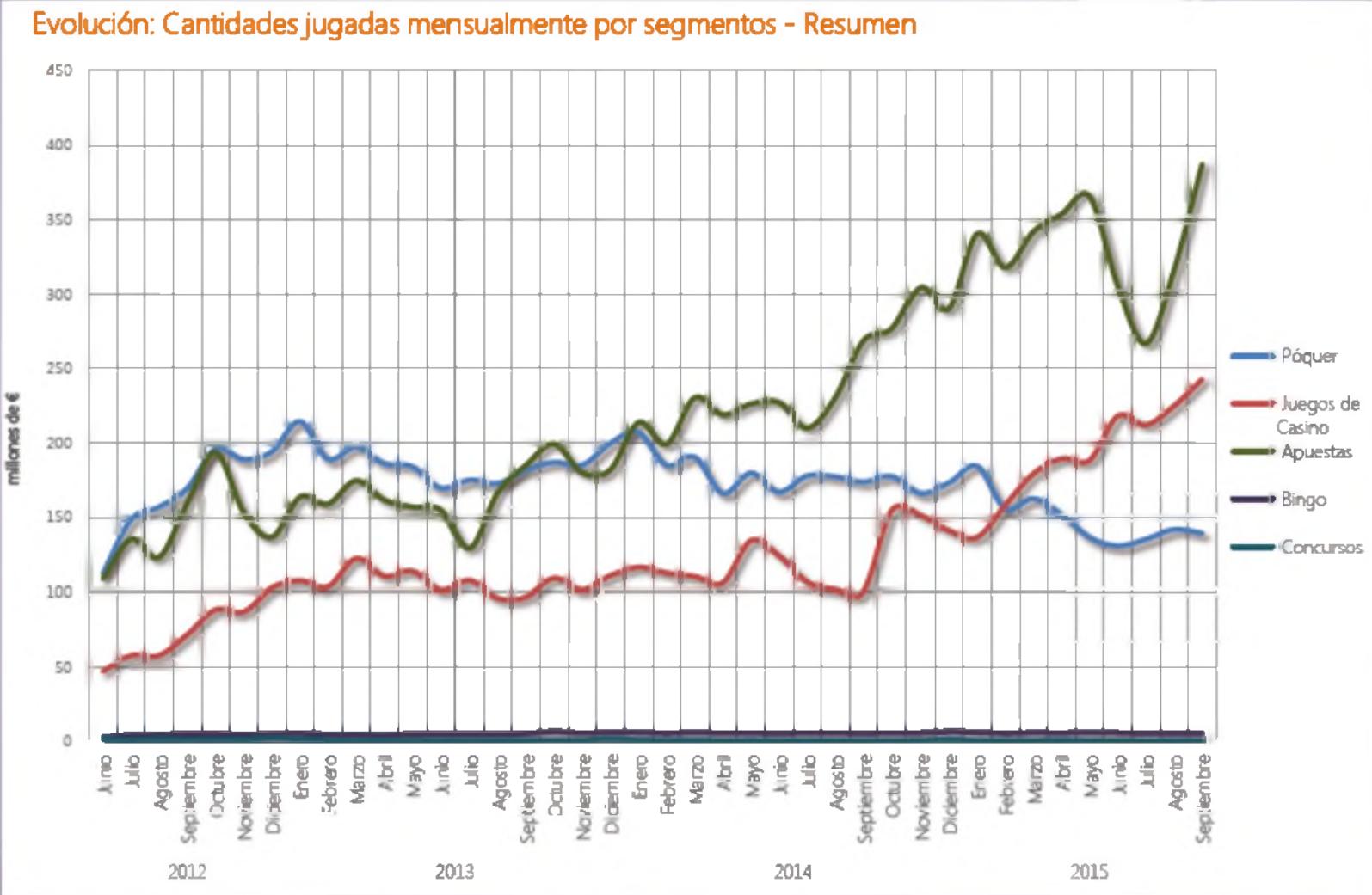


A demand perspective?

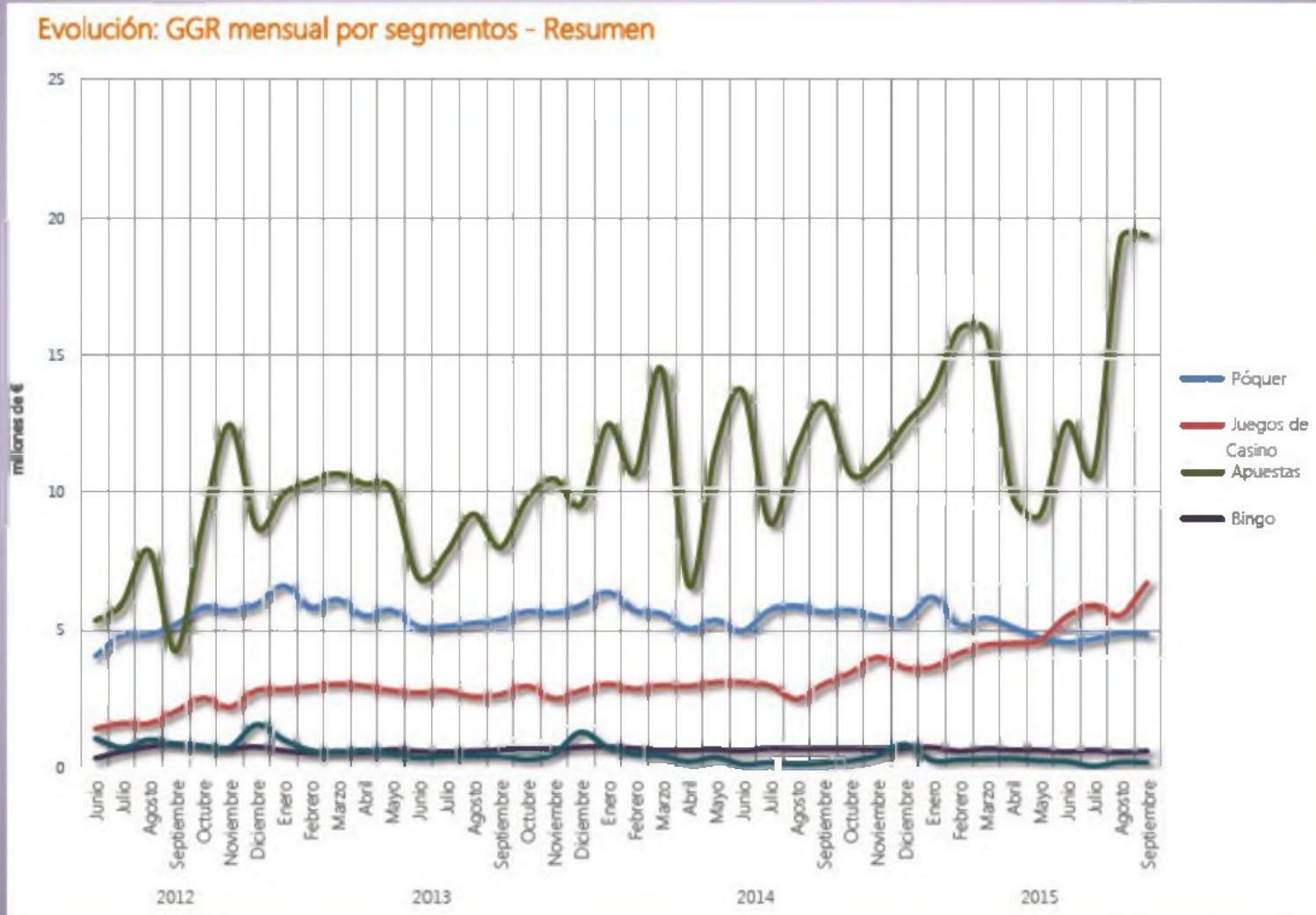


- ① Who are playing (gender, age)
- ② In what games
- ③ How they deposit and withdraw
- ④ How much they spend
- ⑤ How is spend related to wagering
- ⑥ ...

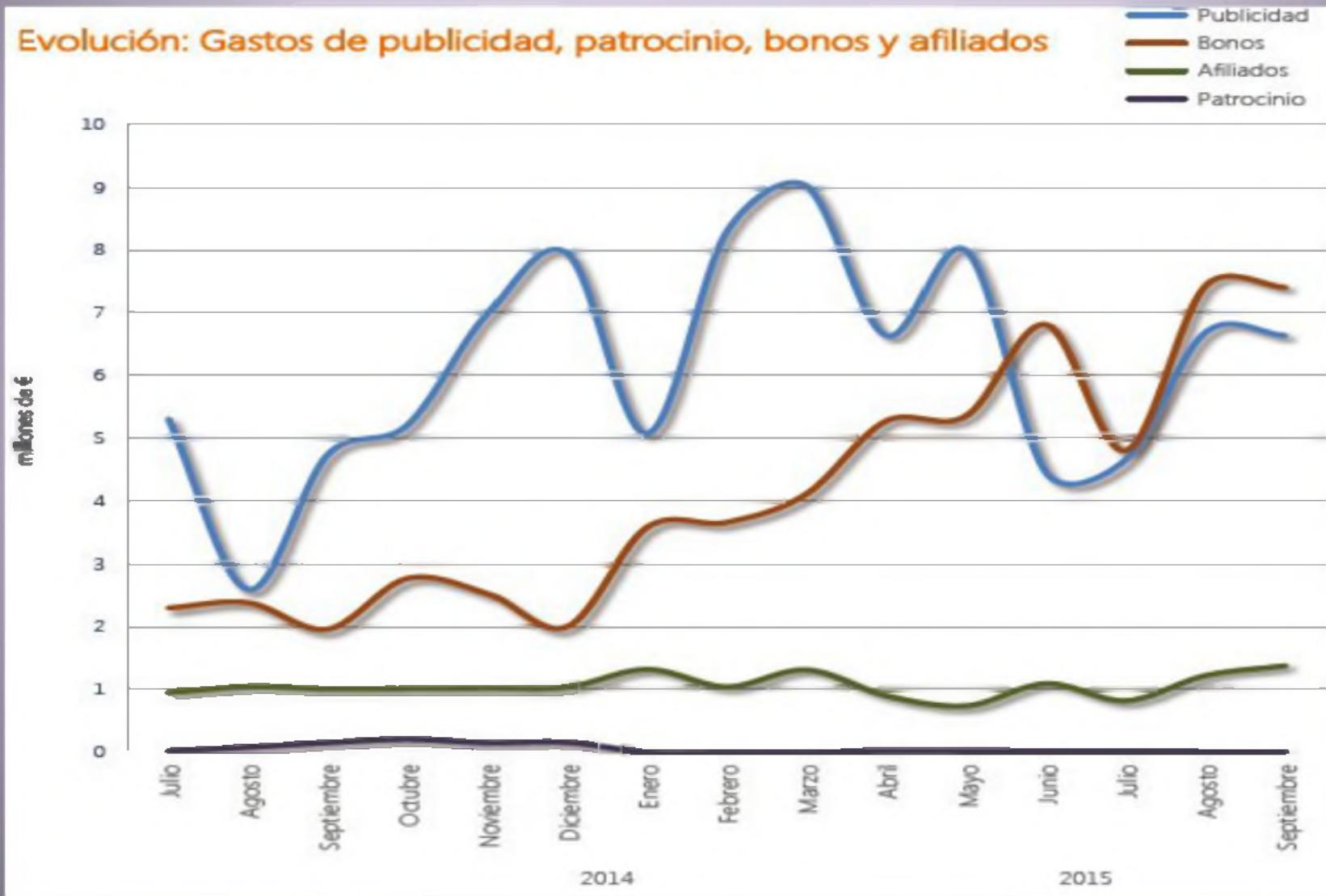
A supply's perspective... turnover



A supply's perspective... GGR



A supply's perspective... marketing expenditure



Market reports

...normally supply-oriented

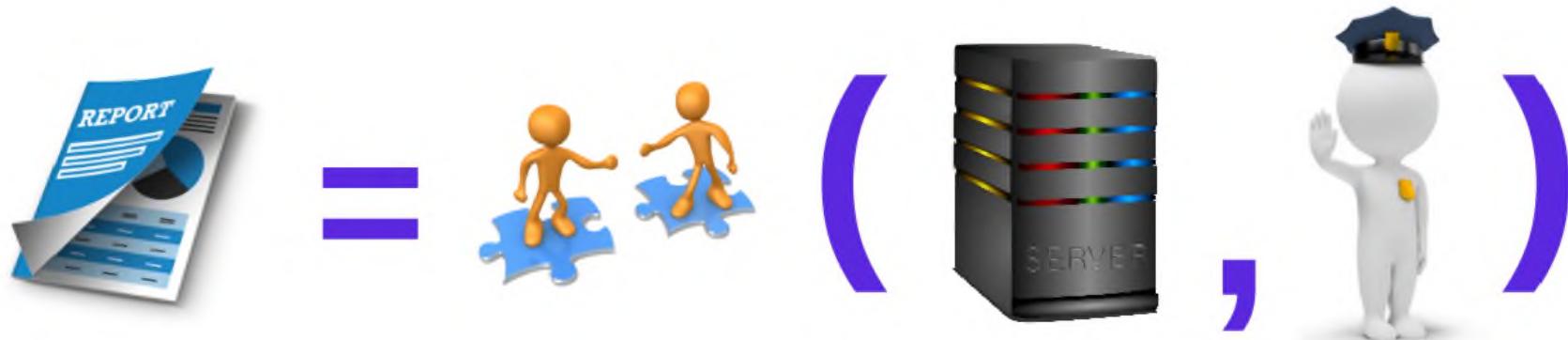


A demand perspective?



- ① Who are playing (gender, age)
- ② In what games
- ③ How they deposit and withdraw
- ④ How much they spend
- ⑤ How is spend related to wagering
- ⑥ ...

2. Why it has been possible



DGOJ's monitoring model
and internal control system



Near real-time data



Integrated reporting data sets

Data scope and
methodology



All Spanish online market players
From all DGOJ licensees (excluding lotteries and
traditional mutual betting)

2 different data sets:
Identity, gender, age (registered users)
Operations in gaming accounts

Player account flow
perspective



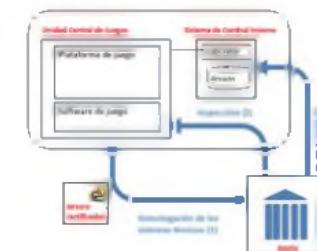
User/Player

Registered/active

DGOJ's monitoring model and internal control system



Near real-time data



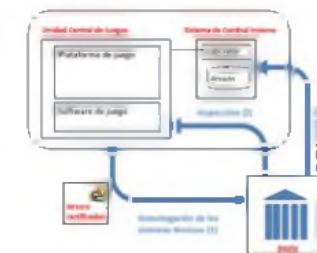
Integrated reporting data sets



DGOJ's monitoring model and internal control system



Near real-time data



Integrated reporting data sets

Data scope and methodology



All Spanish online market players
From all DGOJ licensees (excluding lotteries and
traditional mutual betting)

2 different data sets:
Identity, gender, age (registered users)
Operations in gaming accounts

Player account flow perspective



User/Player

Registered/active

3. Main highlights



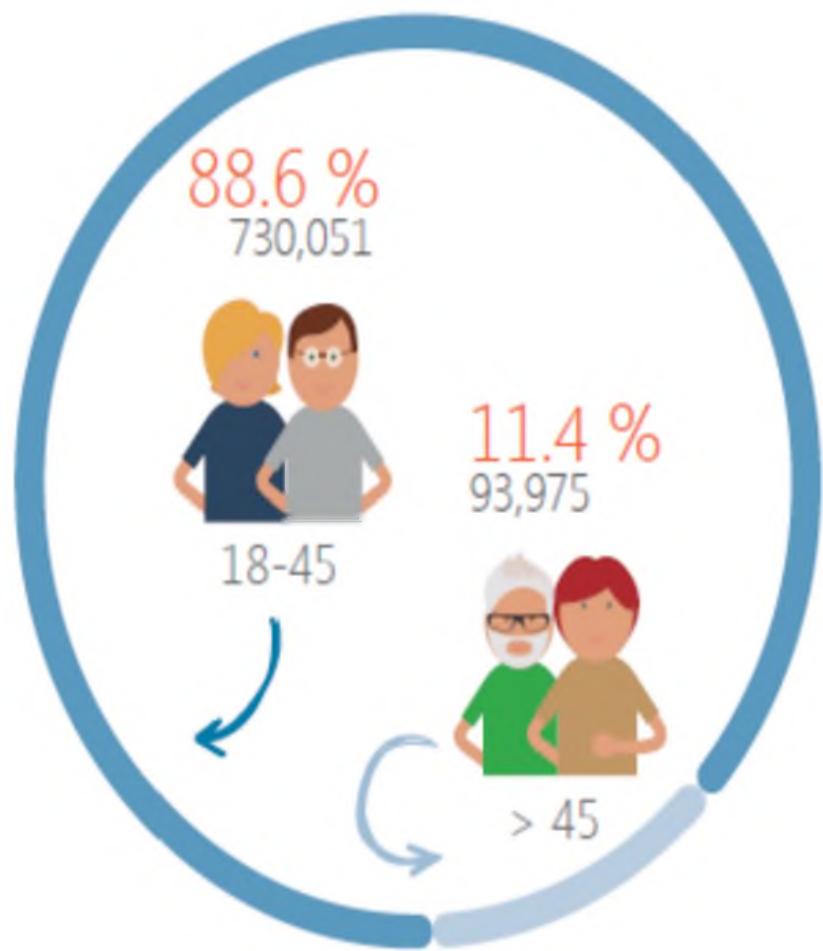
* Those who play *



• Those who play •

During 2014 they have taken part in the games, at least once,

824,026
players



The average of active players every month is



326,954
players

Average time of activity in 2014



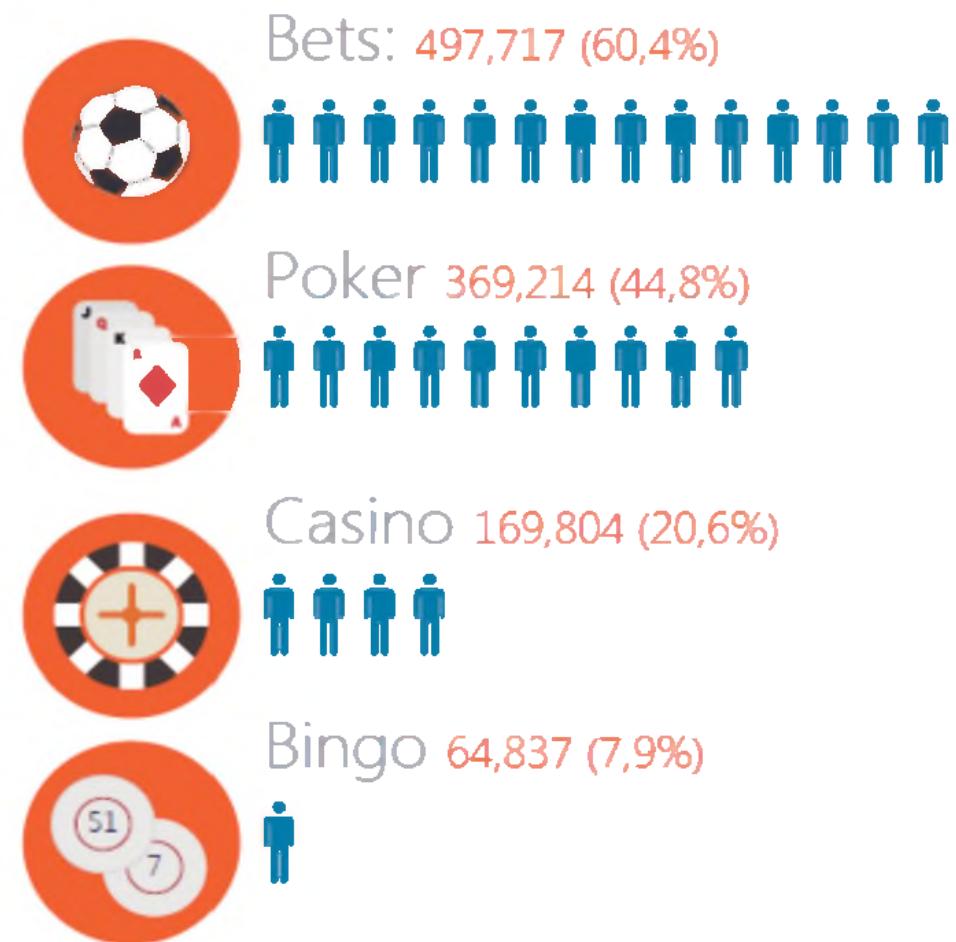
41.7%
of players has
only played



76.2%

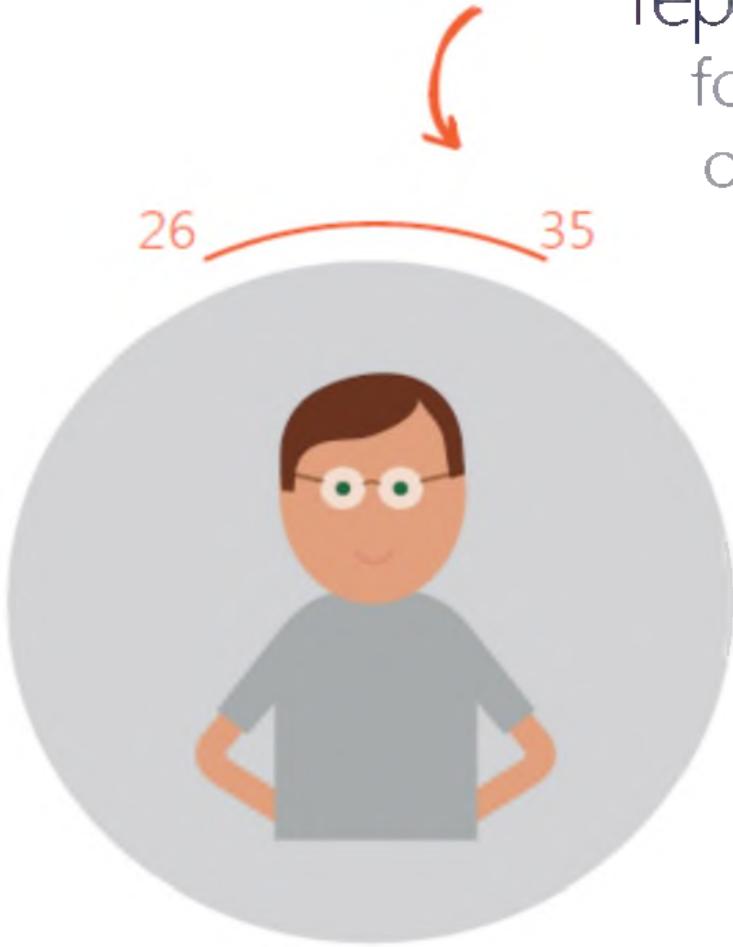


• What is played •

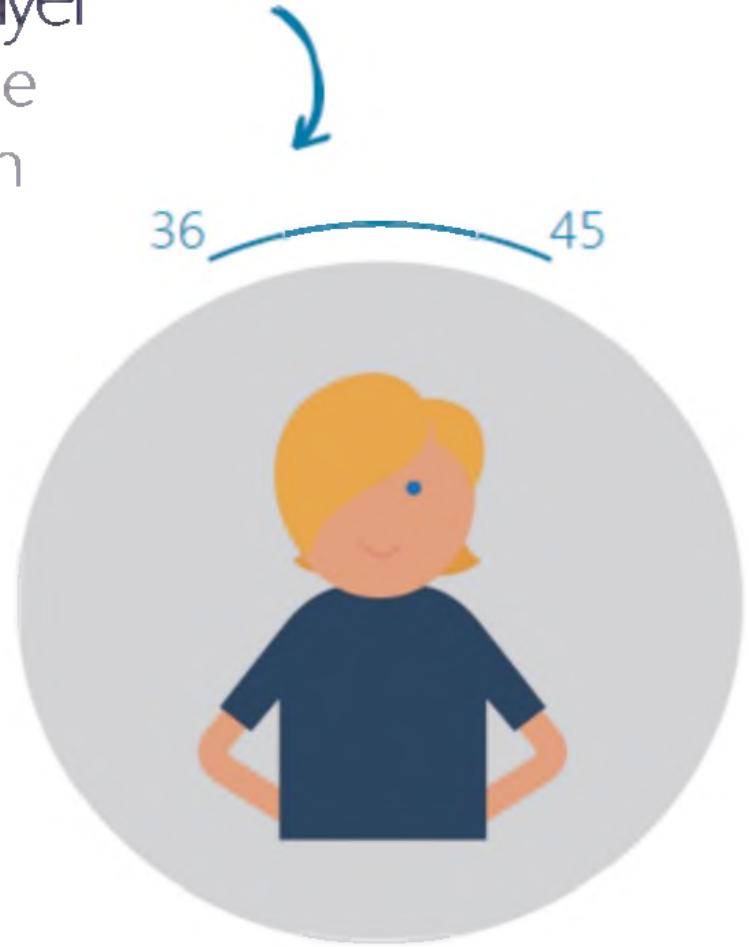


Total: 824,026 players

The profile of the most
representative player
for total volume
of participation



In **bets, casino and poker**
he is **male** of age ranging
from **26 to 35** years old.



In the **bingo** a **woman**
between **36 and 45**
years old.

• How much is played •

The men play

8,165 €

60%
more*

than the women

5,128 €



* Participation average in 2014

+65 / 12,813 €



56-65 / 10,813 €



46-55 / 10,446 €



36-45 / 10,591 €



26-35 / 8,035 €



18-25 / 4,317 €



Player participation increases
with age, the average
participation being

7,769 €

• How much is spent •



The average expenditure per person is

(243)
euros



The players between 46 and 55 years of age are those who spend the most, with those aged between 18 and 25 spending the least

Men spend the double of
women spend

4. Delving deeper...



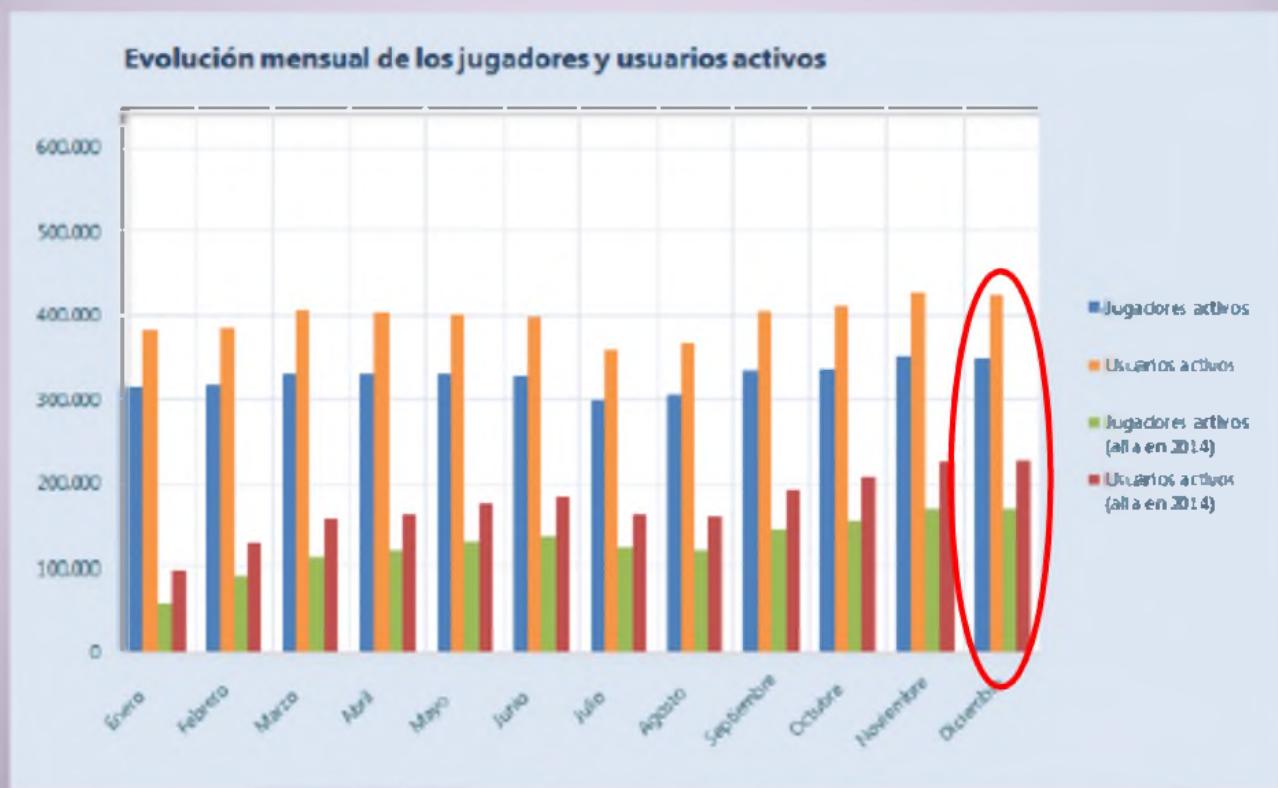
who plays?

The registered: players vs. users



Ratio Users/players largely the same throughout period (2x)

The active: players vs. users



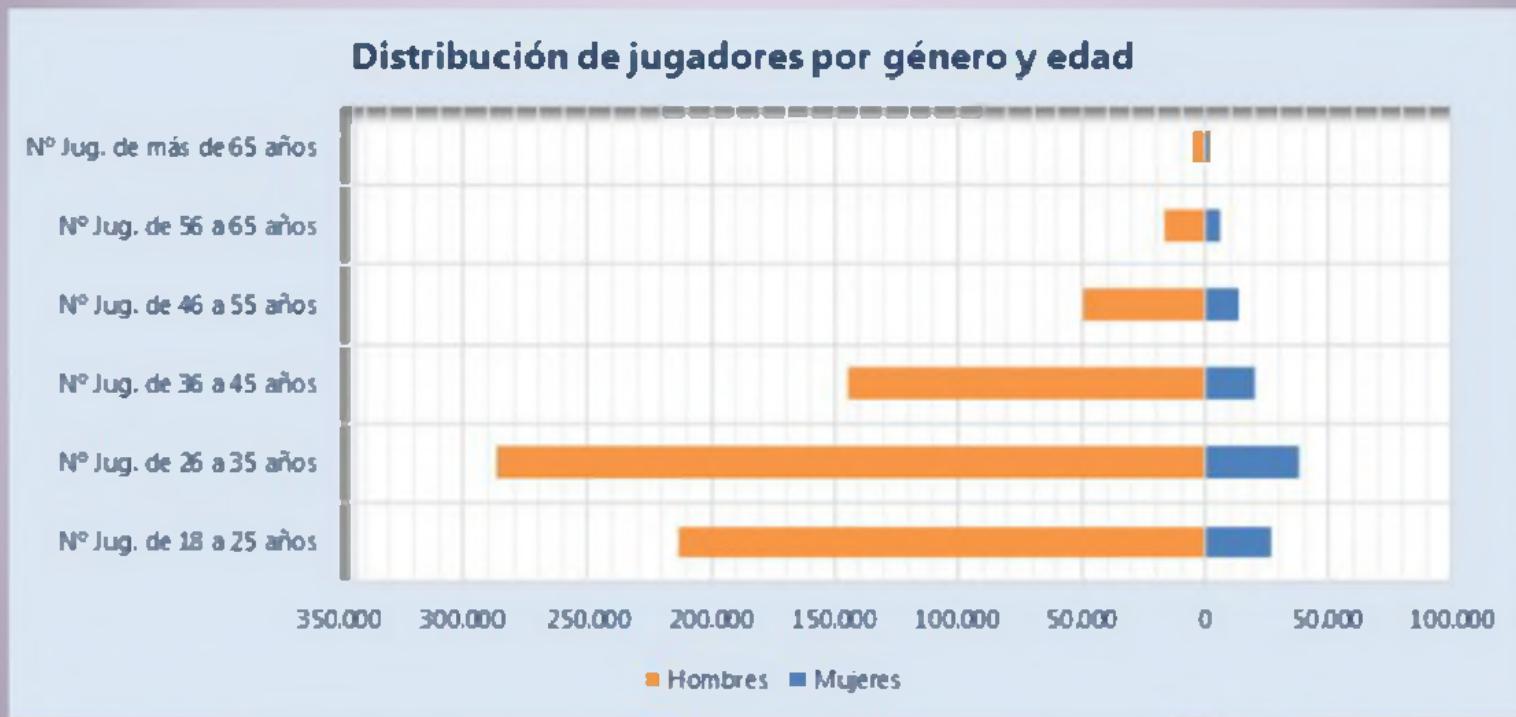
Around half of the total active players and users registered in 2014

Multi-operator players



Male players are more prone to having more than one gambling provider

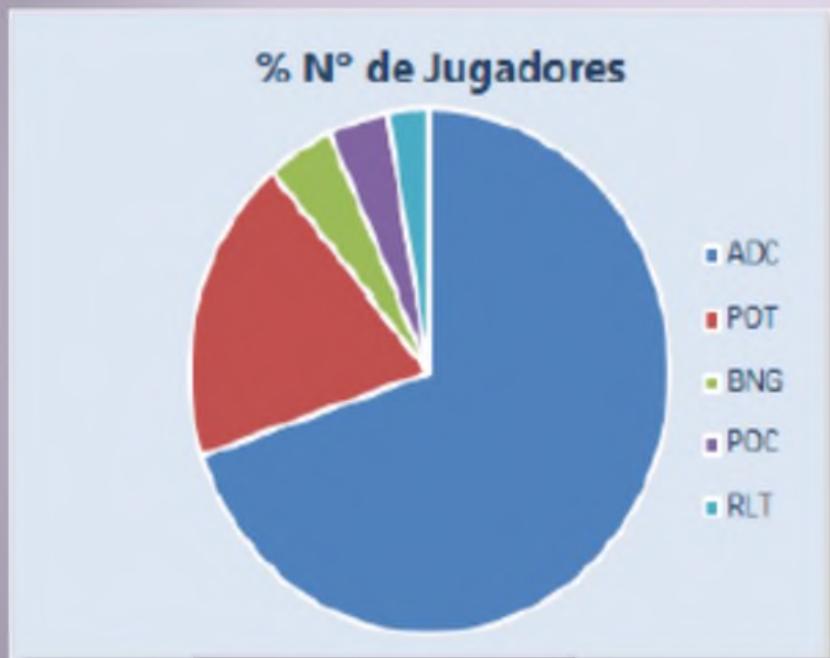
Age-gender distribution



Male player prominence is constant throughout all age segments

**What do
people play?**

Game distribution: one game being played by one player



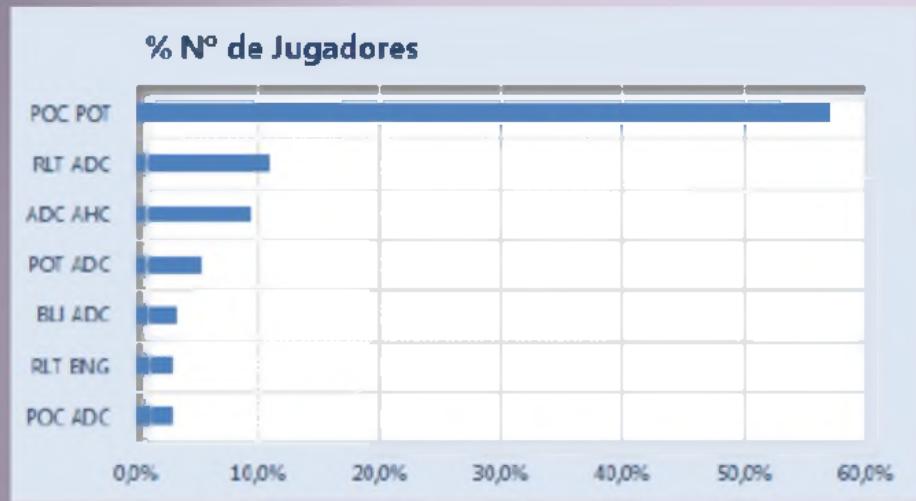
Fixed-odds sport betting: 69%

Poker tournament: 18%

Bingo: 4,5%

Cash poker: 4%

Game distribution: 2-3 games being played by one player



Poker cash-tournament very prominent combination

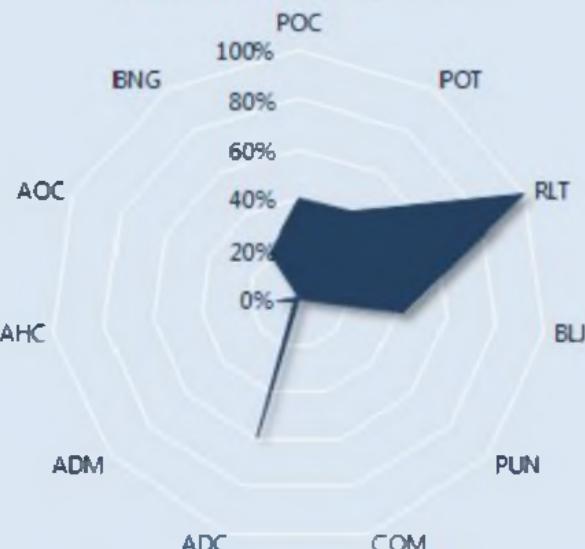
Fixed-odds betting highly combined with rest of games



Game relationships: by player

Relac.	POC	POT	RLT	BLJ	PUN	COM	ADC	ADM	AHC	AOC	BNG
Juego											
POC	100%	86%	21%	18%	0%	0%	29%	1%	4%	0%	6%
POT	67%	100%	17%	14%	0%	0%	24%	1%	3%	0%	5%
RLT	40%	41%	100%	43%	2%	1%	59%	2%	9%	0%	22%
BLJ	52%	53%	66%	100%	2%	1%	58%	2%	9%	0%	22%
PUN	43%	38%	85%	82%	100%	10%	69%	11%	11%	1%	41%
COM	60%	60%	85%	70%	16%	100%	45%	5%	7%	1%	34%
ADC	15%	16%	17%	11%	0%	0%	100%	2%	8%	0%	5%
ADM	18%	18%	26%	18%	3%	1%	81%	100%	8%	1%	13%
AHC	24%	25%	29%	20%	1%	0%	98%	2%	100%	0%	6%
AOC	26%	29%	44%	28%	2%	1%	100%	12%	32%	100%	16%
BNG	23%	24%	47%	32%	2%	1%	36%	2%	4%	0%	100%

Ruleta (RLT): % Jugadores



Black Jack (BLJ): % Jugadores



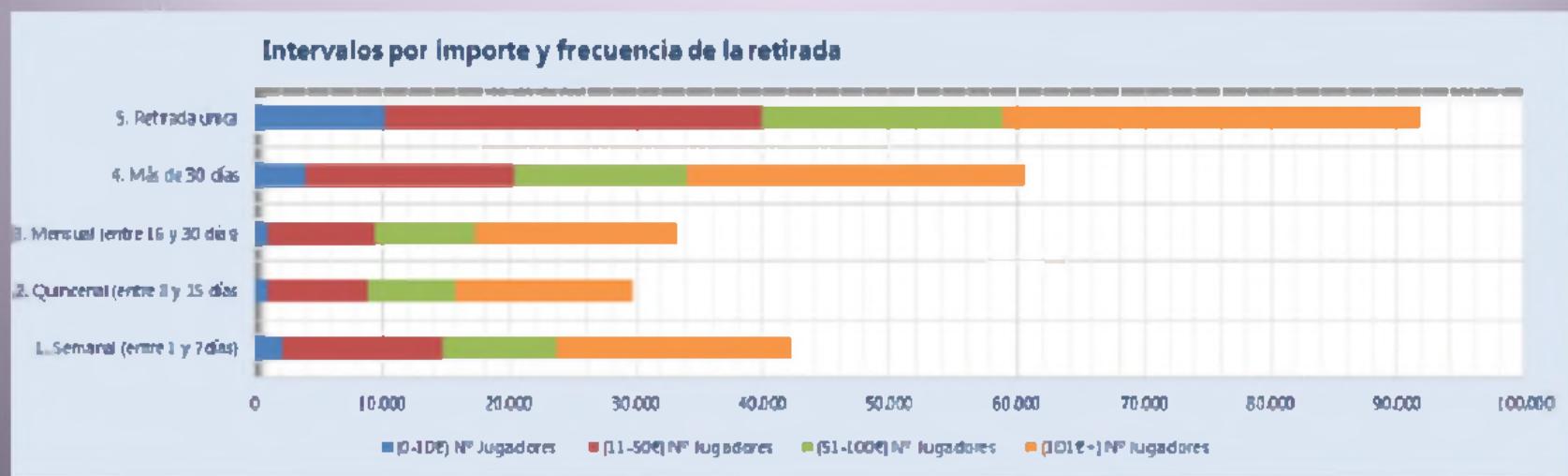
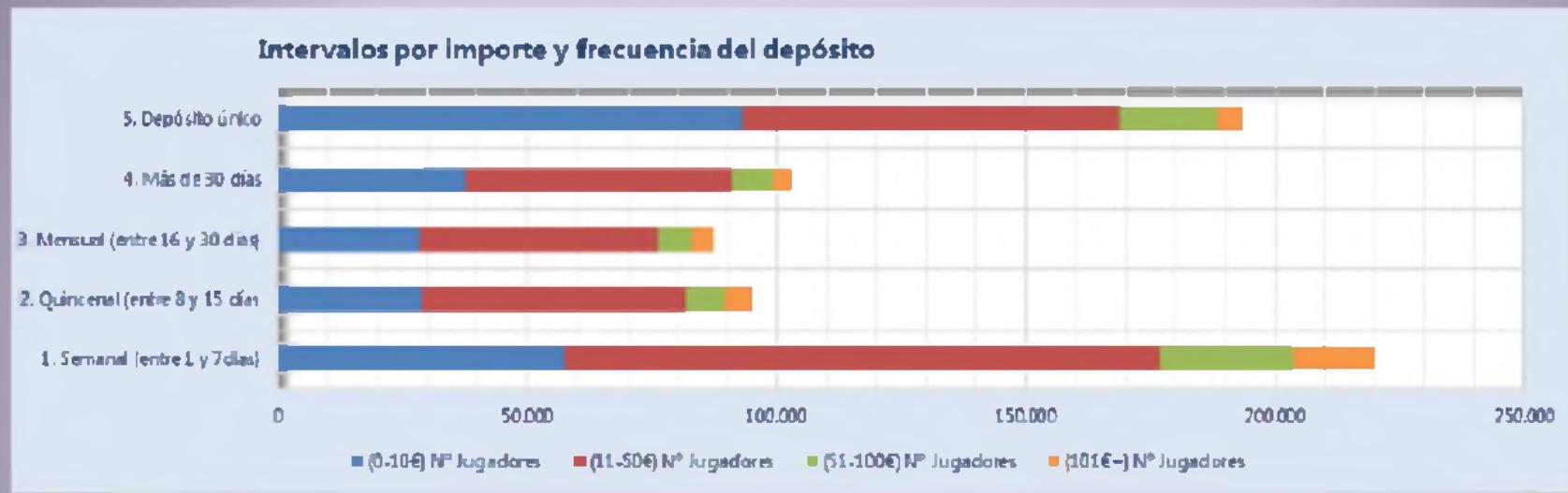
Game relationships: by amounts wagered

Relac.	POC	POT	RLT	BLJ	PUN	COM	ADC	ADM	AHC	AOC	BNG
Juego											
POC	100%	33%	23%	11%	0%	0%	31%	0%	0%	0%	1%
POT	264%	100%	61%	31%	0%	0%	80%	0%	1%	0%	2%
RLT	56%	21%	100%	31%	0%	0%	69%	0%	1%	0%	4%
BLJ	118%	46%	163%	100%	0%	0%	127%	0%	2%	0%	9%
PUN	491%	156%	2.811%	1.505%	100%	3%	823%	1%	5%	0%	52%
COM	6.568%	2.136%	46.729%	7.529%	639%	100%	3.561%	2%	18%	0%	356%
ADC	16%	6%	22%	10%	0%	0%	100%	0%	1%	0%	0%
ADM	2.458%	1.161%	14.723%	5.015%	40%	1%	30.552%	100%	156%	1%	318%
AHC	159%	68%	200%	123%	0%	0%	1.917%	0%	100%	0%	5%
AOC	1.751%	1.612%	5.696%	1.204%	1%	0%	42.896%	4%	1.016%	100%	70%
BNG	69%	35%	518%	176%	2%	0%	197%	0%	2%	0%	100%



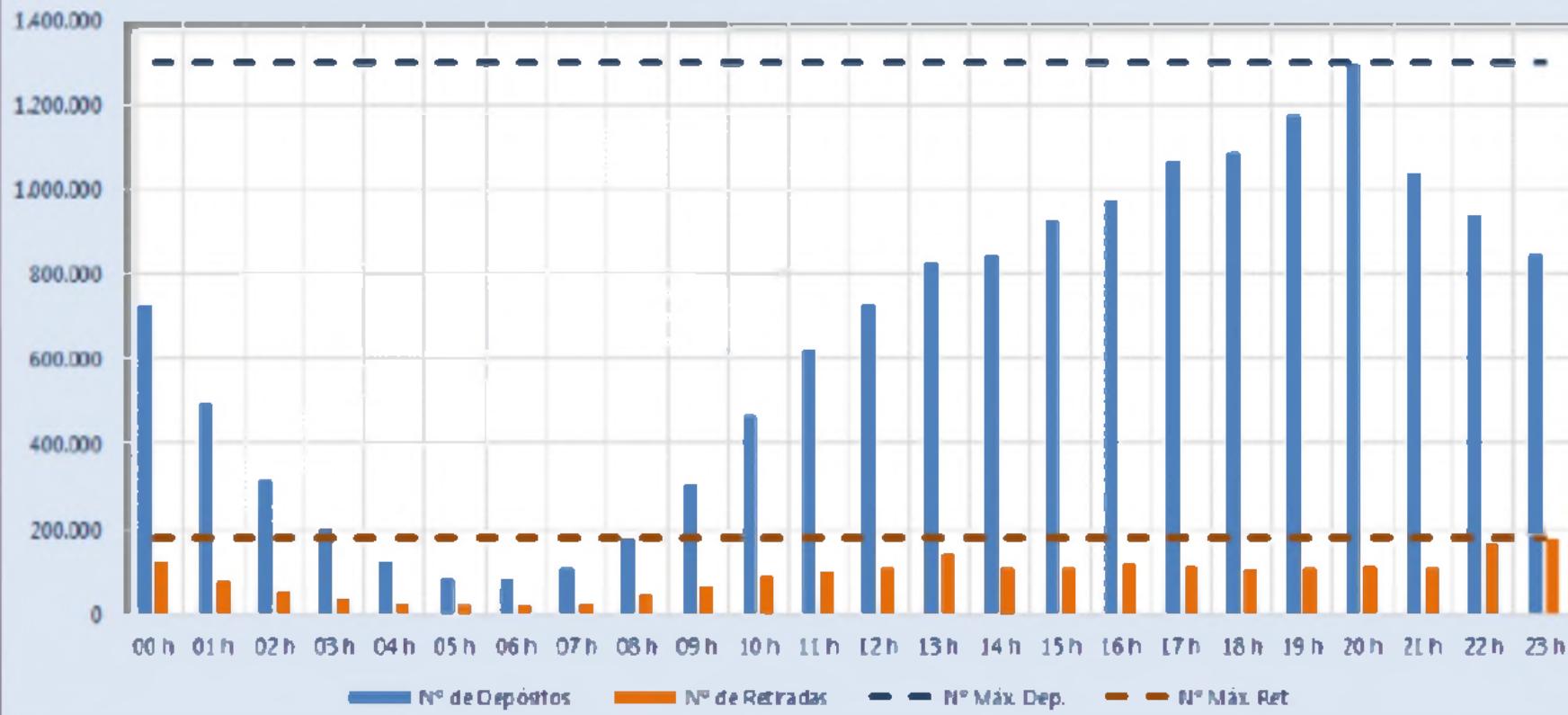
Deposits, withdrawals and player spend

Deposits/withdrawals: frequency and amount



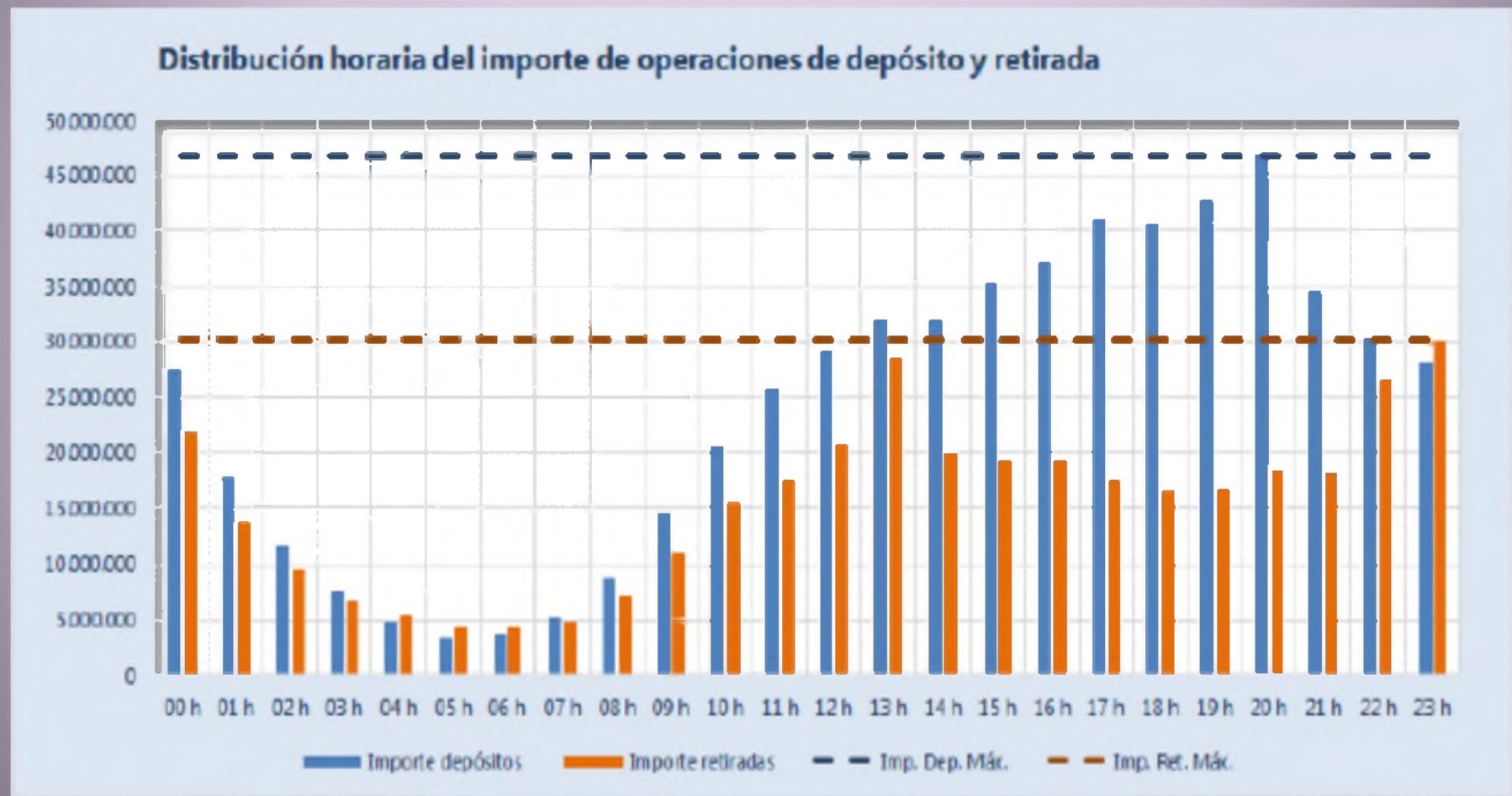
Deposits/withdrawals: hourly distribution by number

Distribución horaria del número de operaciones de depósito y retirada



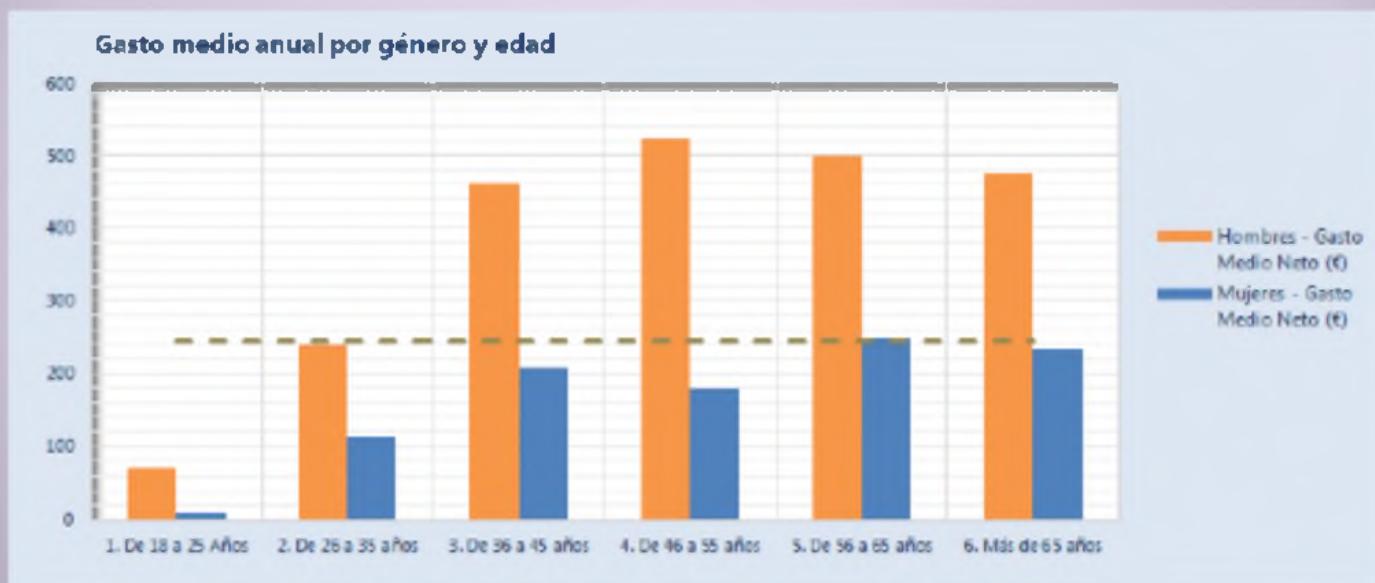
Higher activity on evening hours

Deposits/withdrawals: hourly distribution by amount



Higher activity on evening hours

Player spend: by gender/age



Male players exhibit a constant greater spend throughout all age segments

P&L distribution

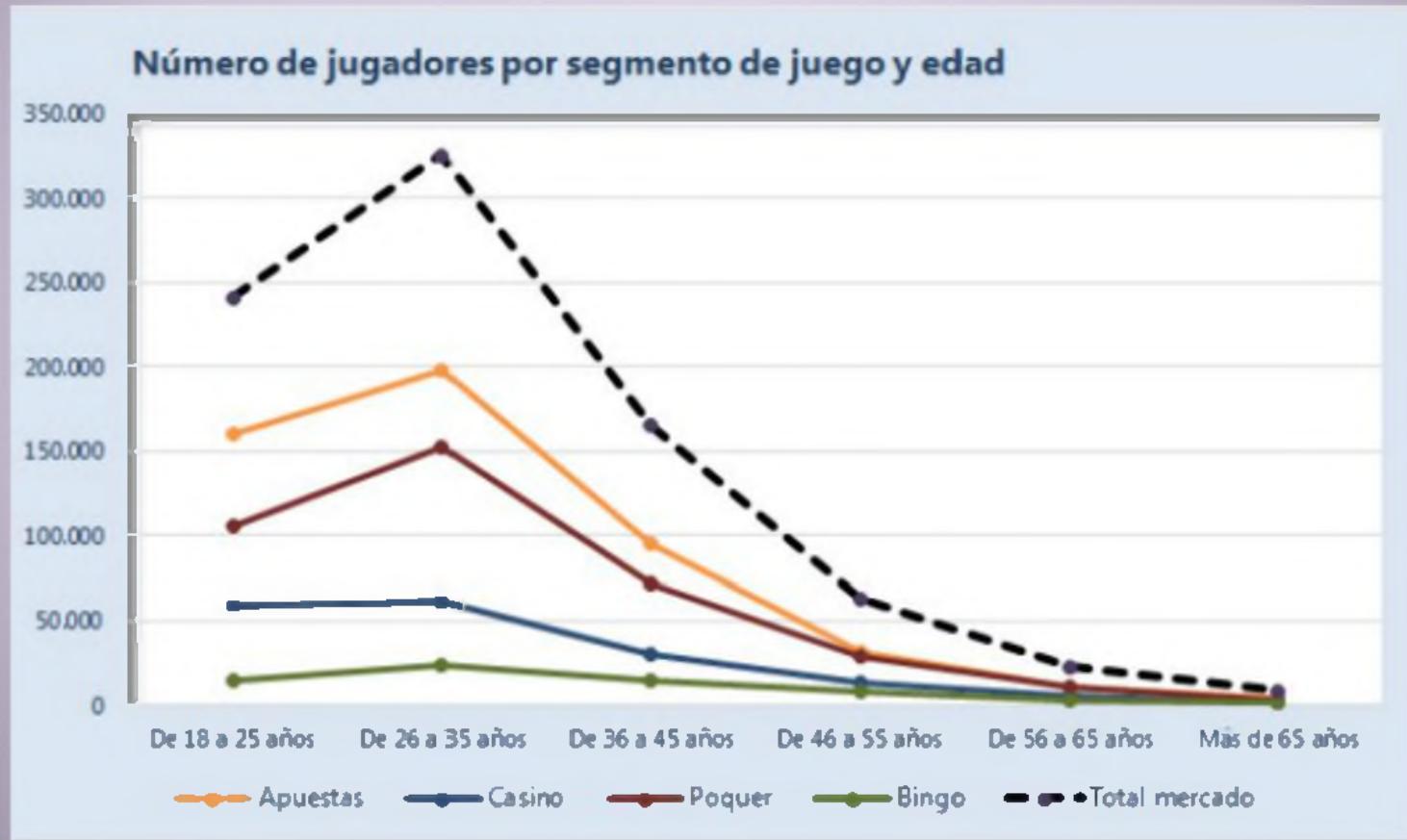


*Statistical median for annual player net wealth decrease: EUR
25. 50% players located between EUR 0,15 and EUR 129*



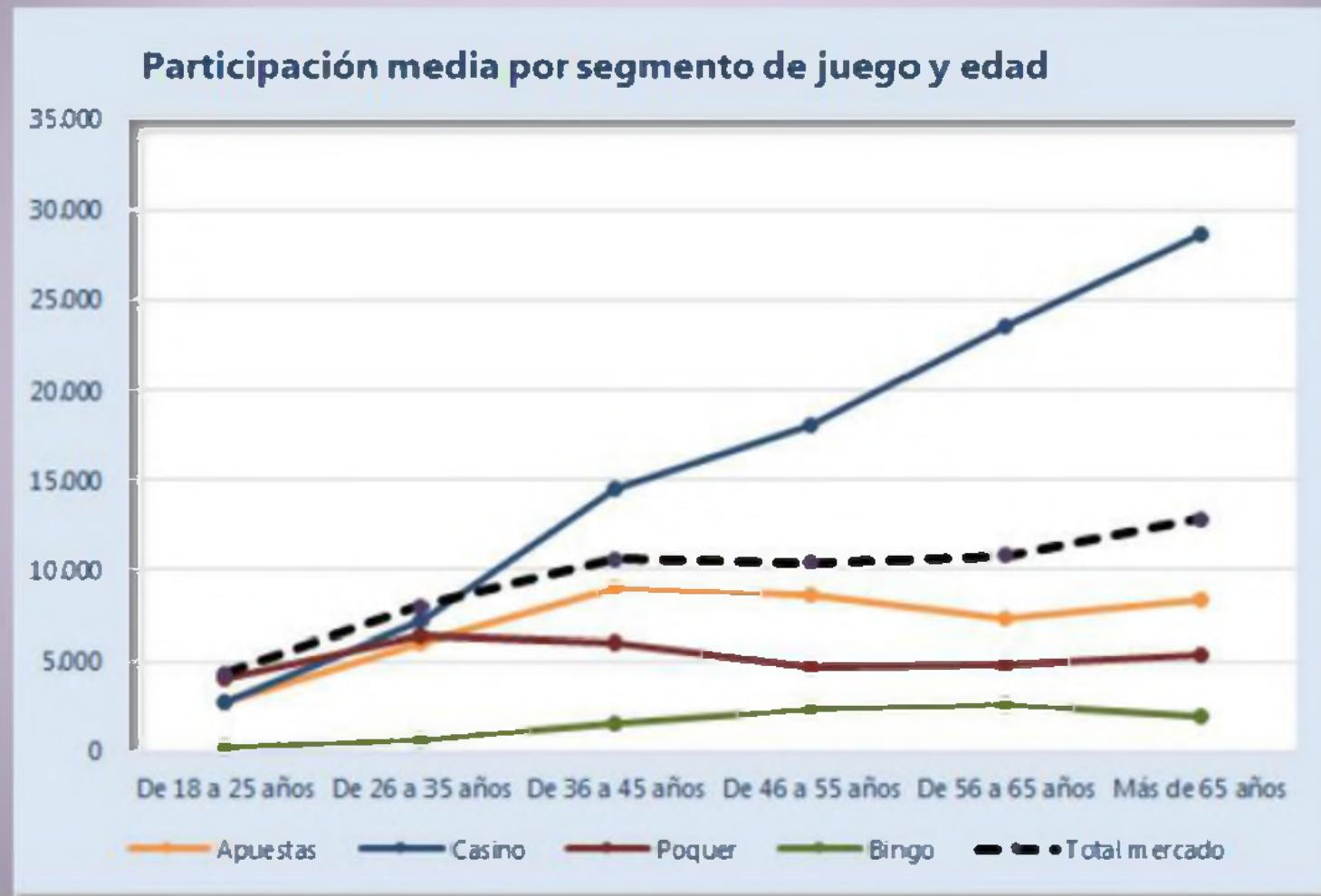
**What games
are played?**

Number of players by game type/age



Betting is the most popular game in terms of player number

Average yearly wager by game type/age



Staked amounts tend to increase parallel to age (heavily on bingo/casino)

Game distribution: players/participation and RTP

Principales magnitudes por segmentos				
Segmento	Número de jugadores	Participación media en €	Premio Medio en €	RTP
Apuestas	497.717	5.743	5.432	94,6%
Casino	169.804	8.497	8.267	97,3%
Póquer	369.214	5.502	5.313	96,6%
Bingo	64.837	1.066	918	86,1%
Resumen Mercado	824.026	7.769	7.437	95,7%

Highest RTP yielded by casino games

5. Uses and implications

Business intelligence



Time series analysis



Policy implications



Comparative exercises



Available @

<http://unionordenacionjuego.es/en/informe-analisis-del-jugador-online>

thank you!

Informe

2014 Análisis del perfil del jugador online

Elaborado por la
Dirección General de Ordenación del Juego



Available @

<https://www.ordenacionjuego.es/en/informe-jugador-online>

thank you!

The player profile in Spain's online gambling market 2014

A report by



1. A study on consumer trends!



2. Why it has been possible



3. Main highlights



4. Delving deeper...



5. Uses and implications

