

The player profile in Spain's online gambling market 2014

A report by



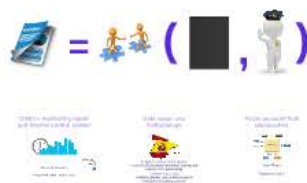
Jugar BIEN ^{es}
jugar con responsabilidad



1. A study on consumer trends!



2. Why it has been possible



3. Main highlights



4. Delving deeper...



5. Uses and implications



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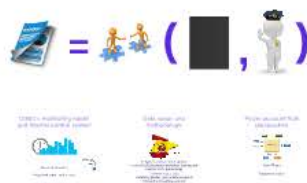
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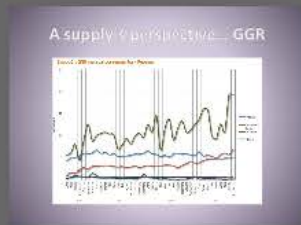


1. A study on consumer trends!



Market reports

...normally supply-oriented



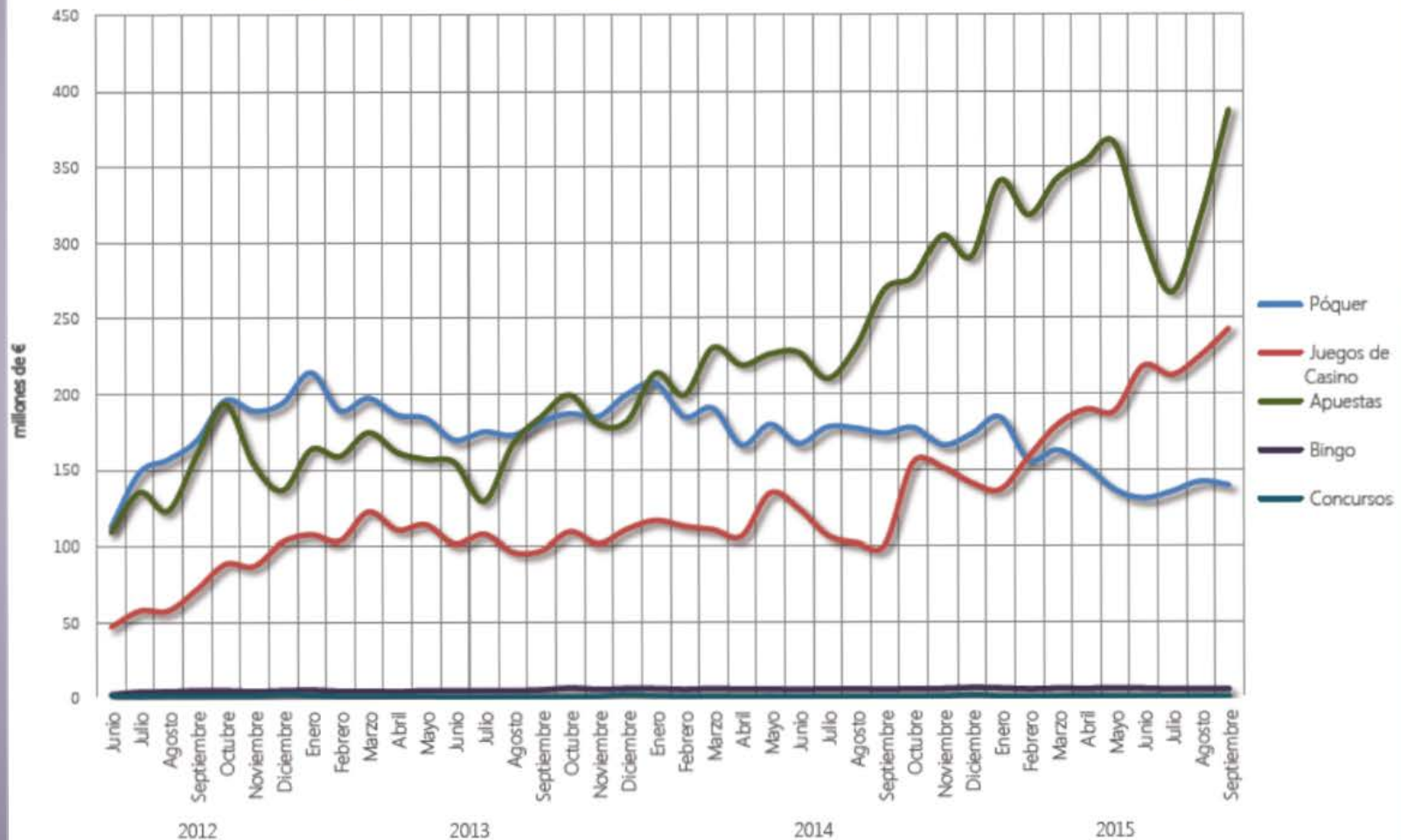
A demand perspective?



- 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 ...

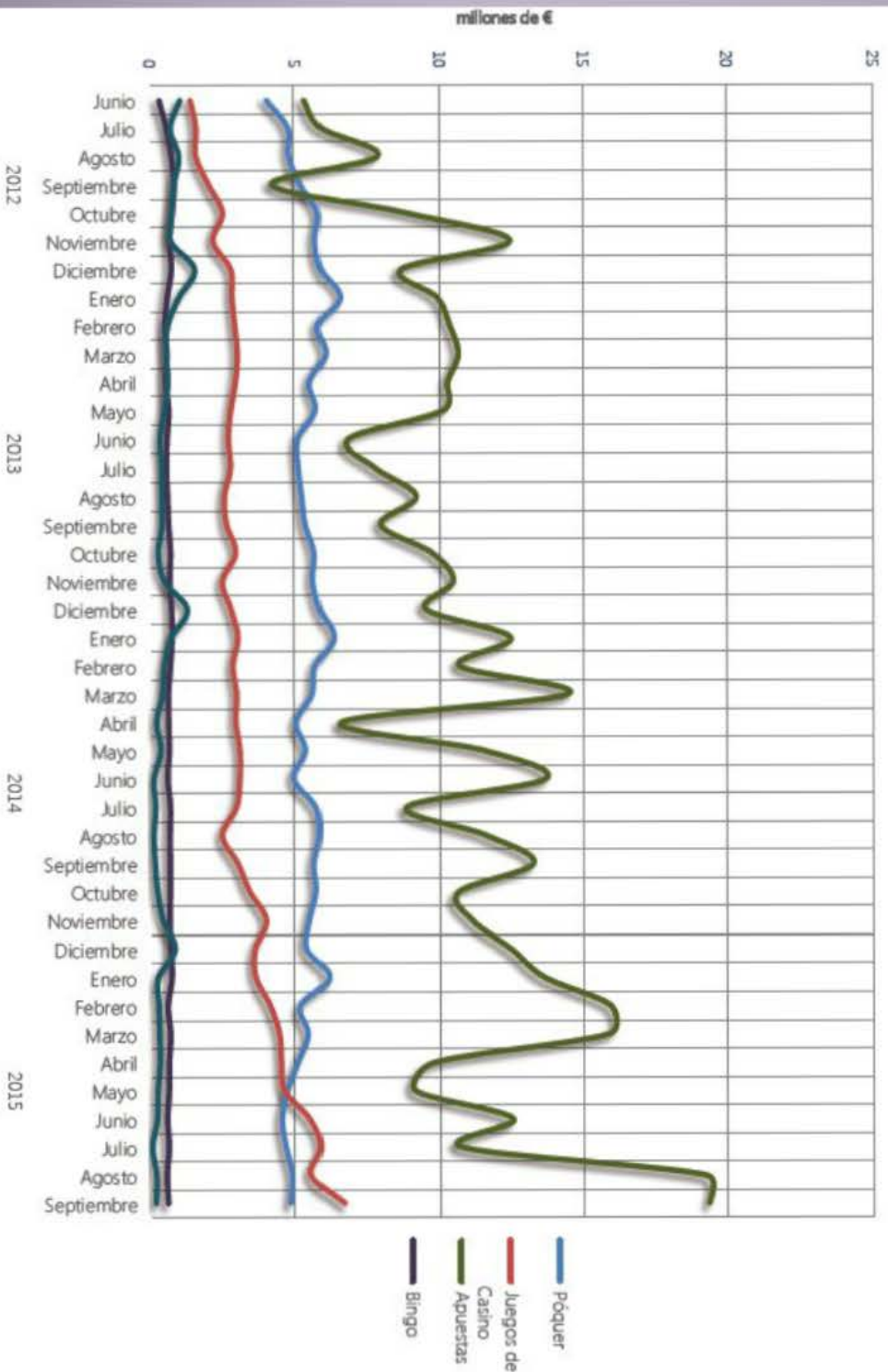
A supply's perspective... turnover

Evolución: Cantidades jugadas mensualmente por segmentos - Resumen

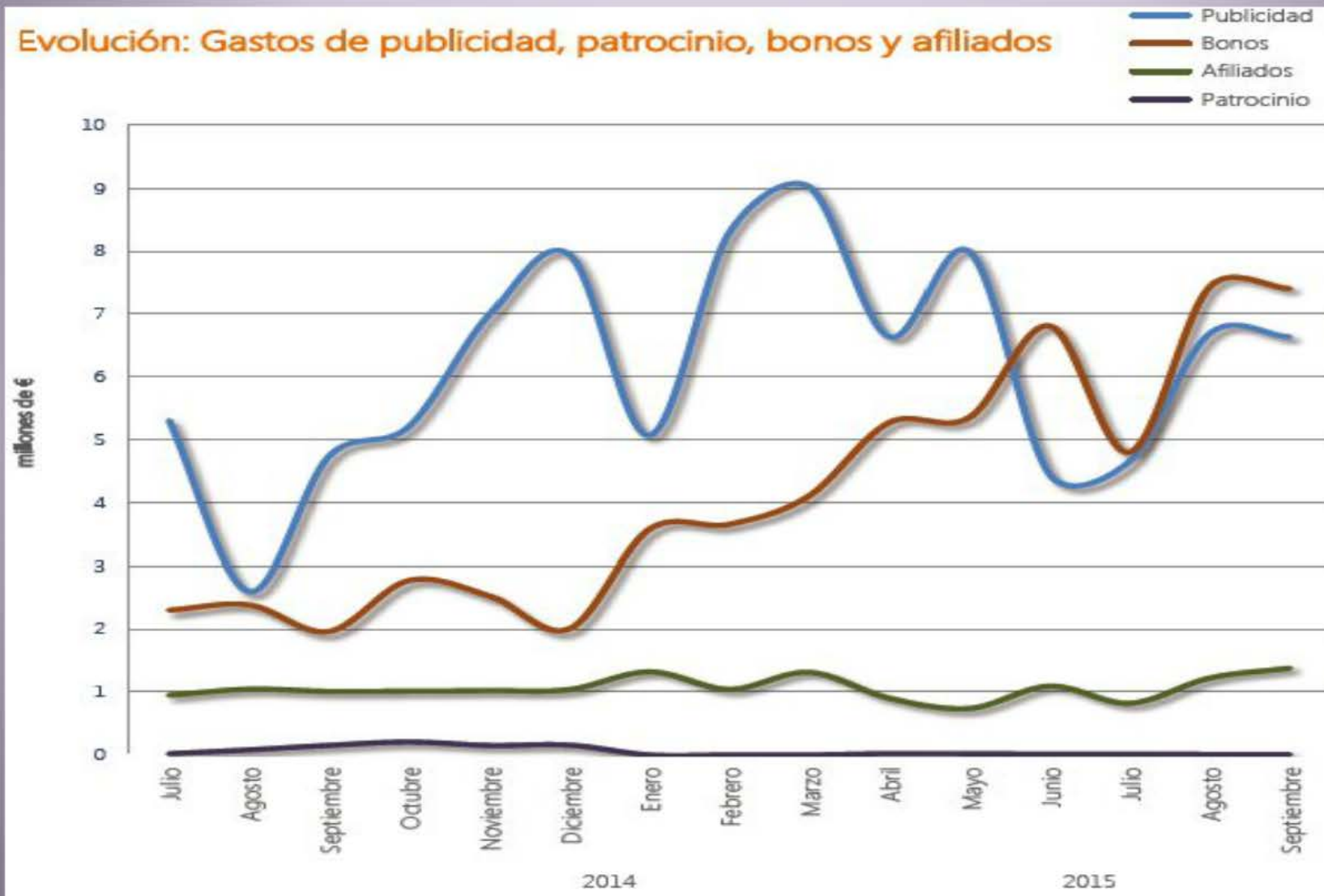


A supply's perspective... GGR

Evolución: GGR mensual por segmentos - Resumen

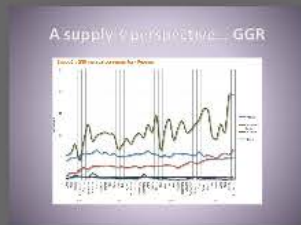


A supply's perspective... marketing expenditure



Market reports

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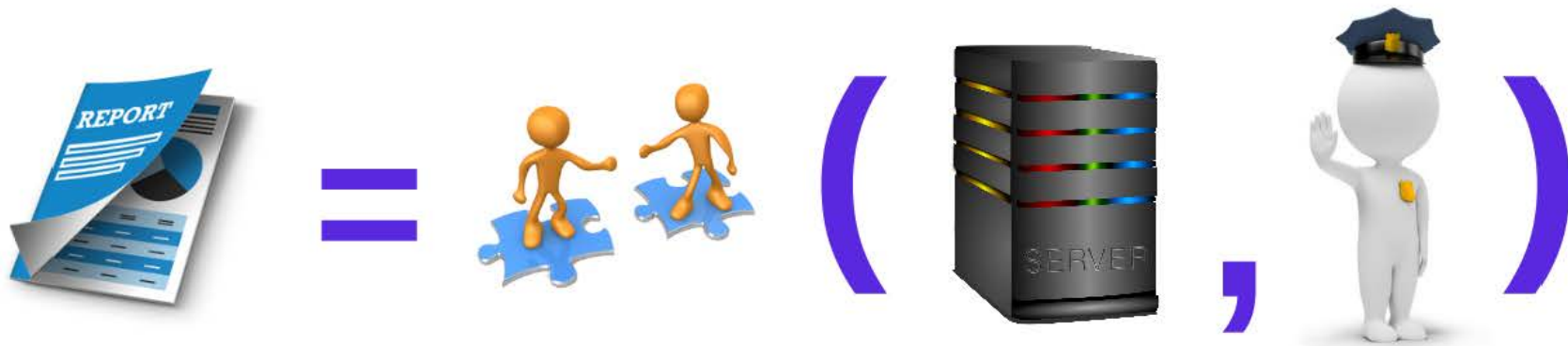


A demand perspective?



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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

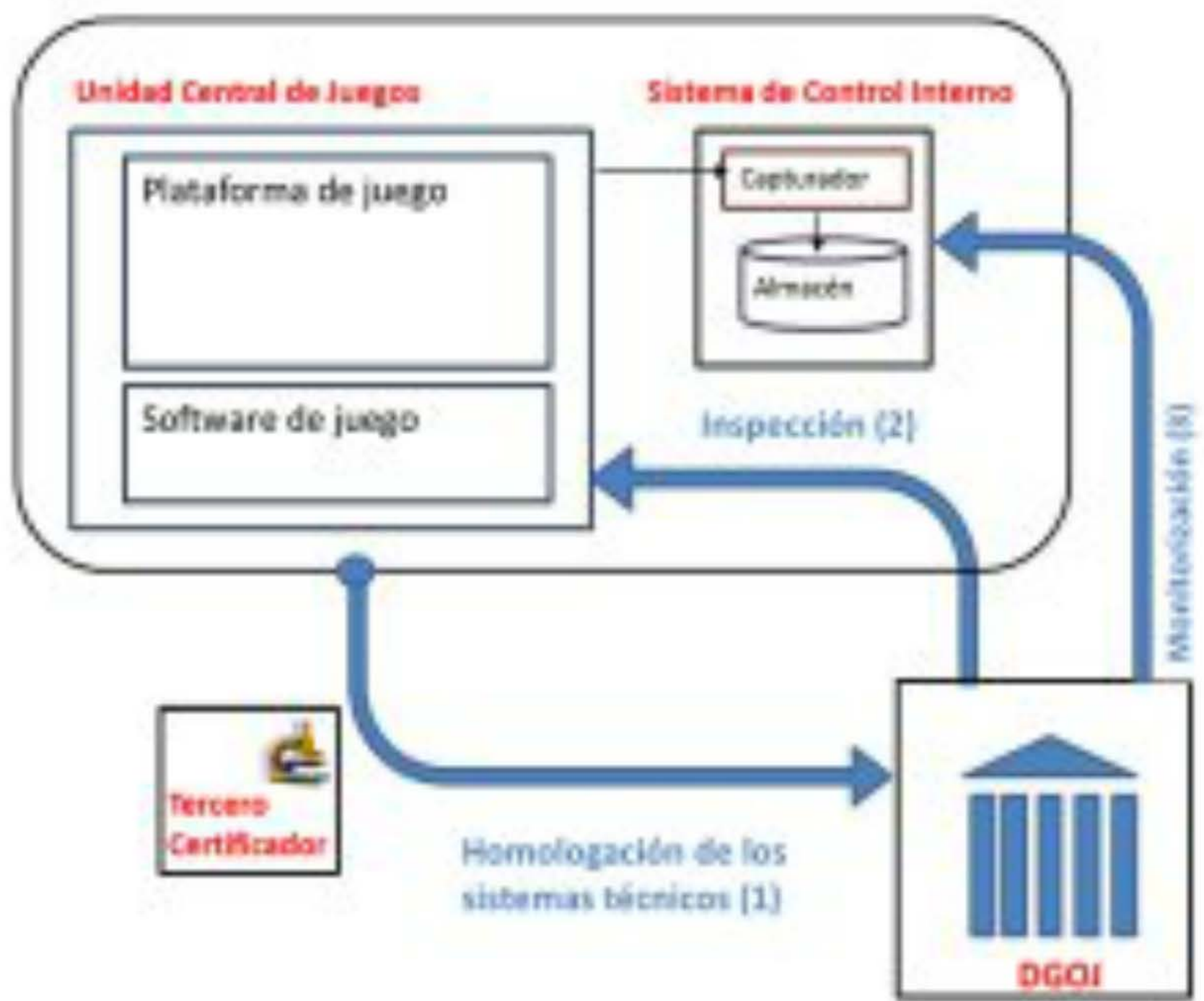


All Spanish online market players
From all DGOJ licensees (excluding lotteries and traditional mutual betting)
2 different data sets:
Identity, gender, age (registered users)
Operations in gaming accounts

Player account flow perspective



User/Player
Registered/active

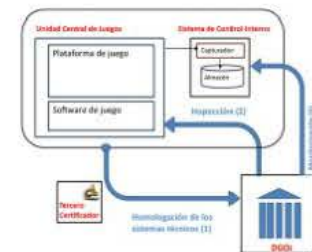


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3. Main highlights



• Those who play •



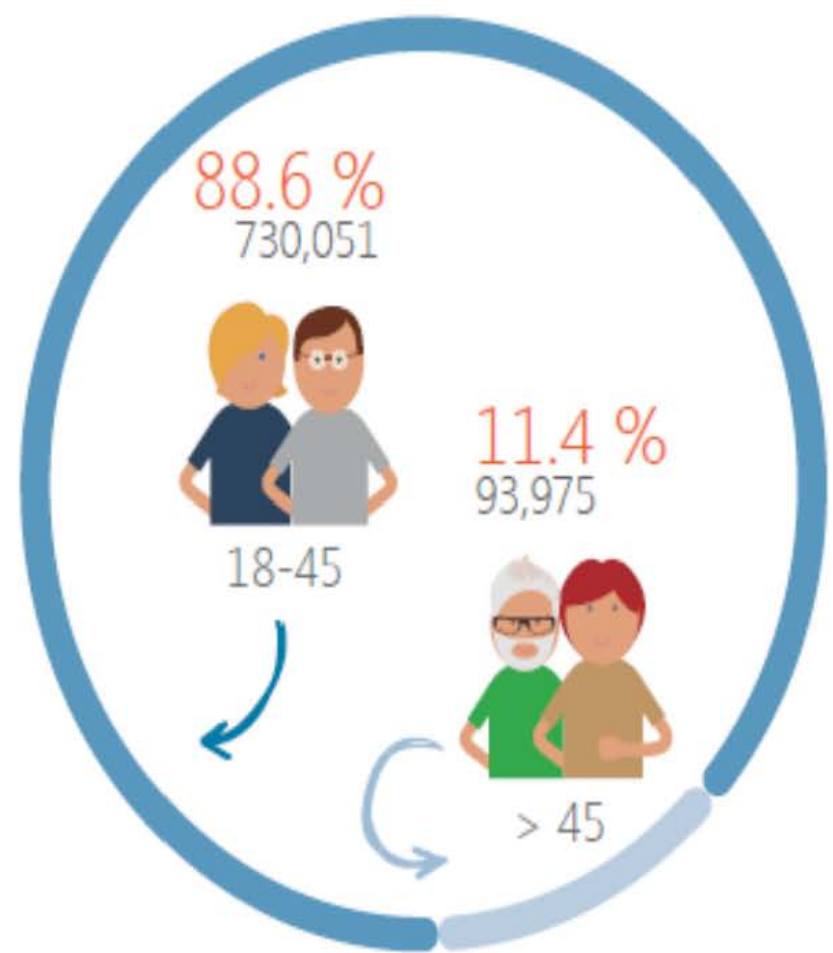
• What is played •



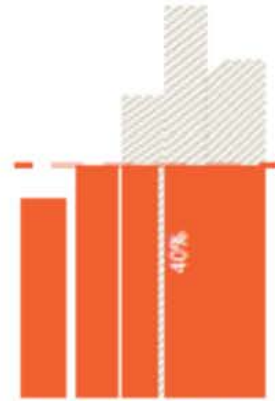
• Those who play •

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



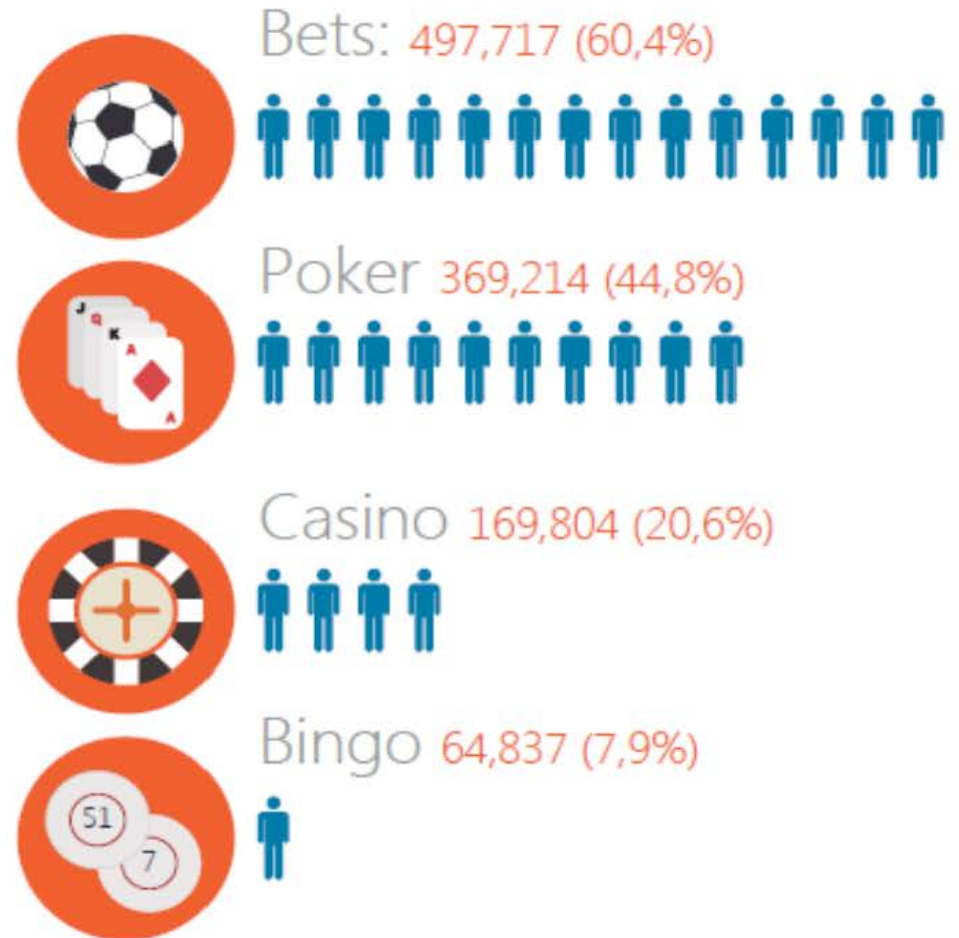
41.7%
of players has only played



76.2%

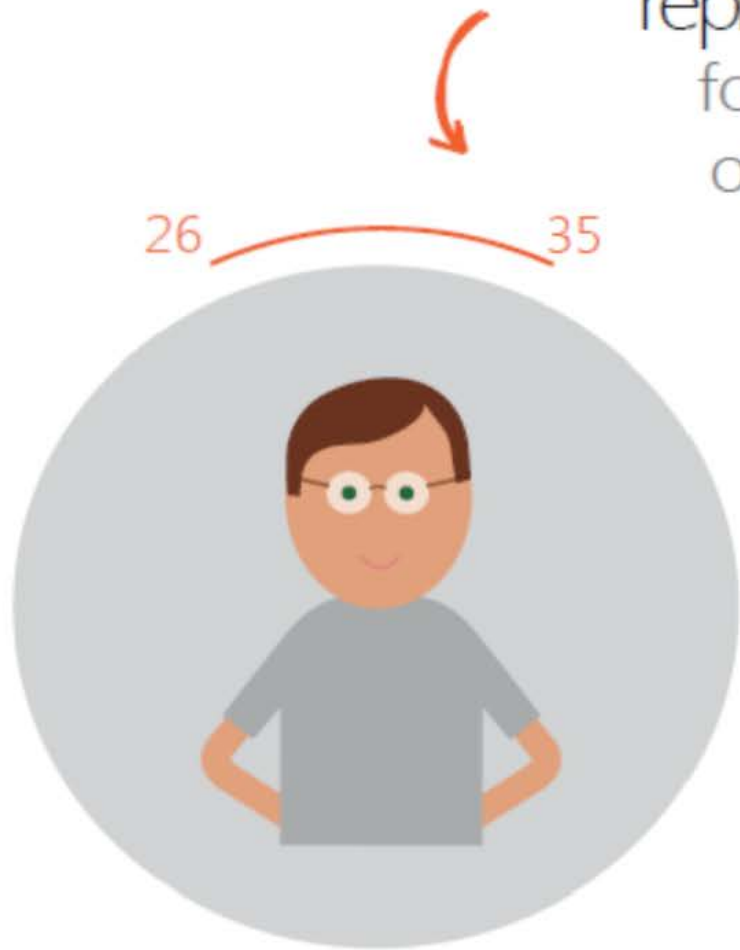


• What is played •

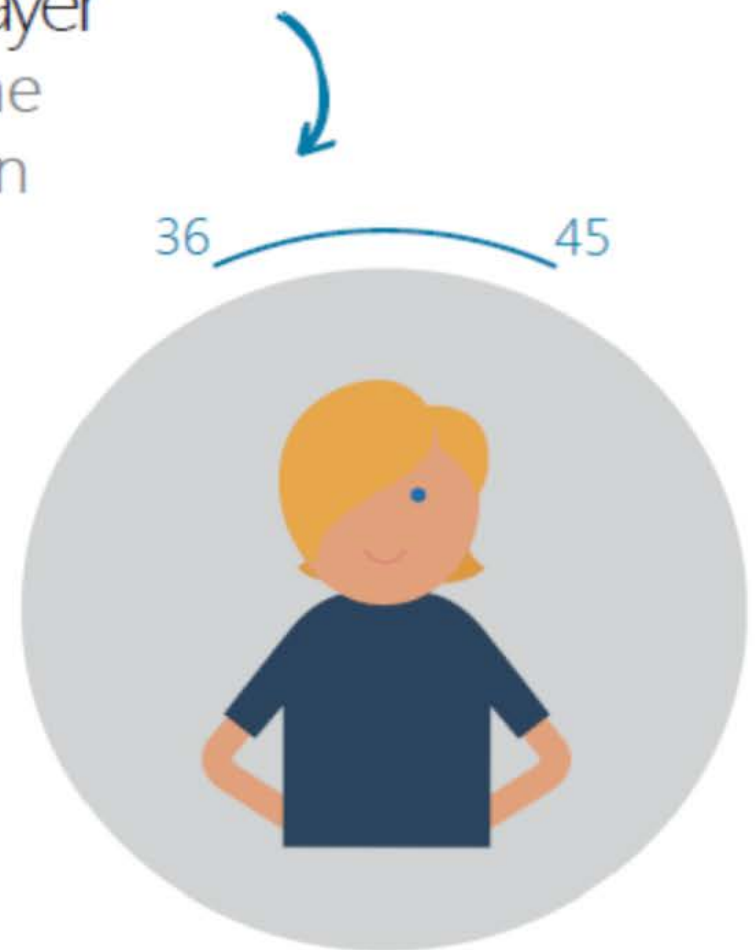


Total: 824,026 players

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.

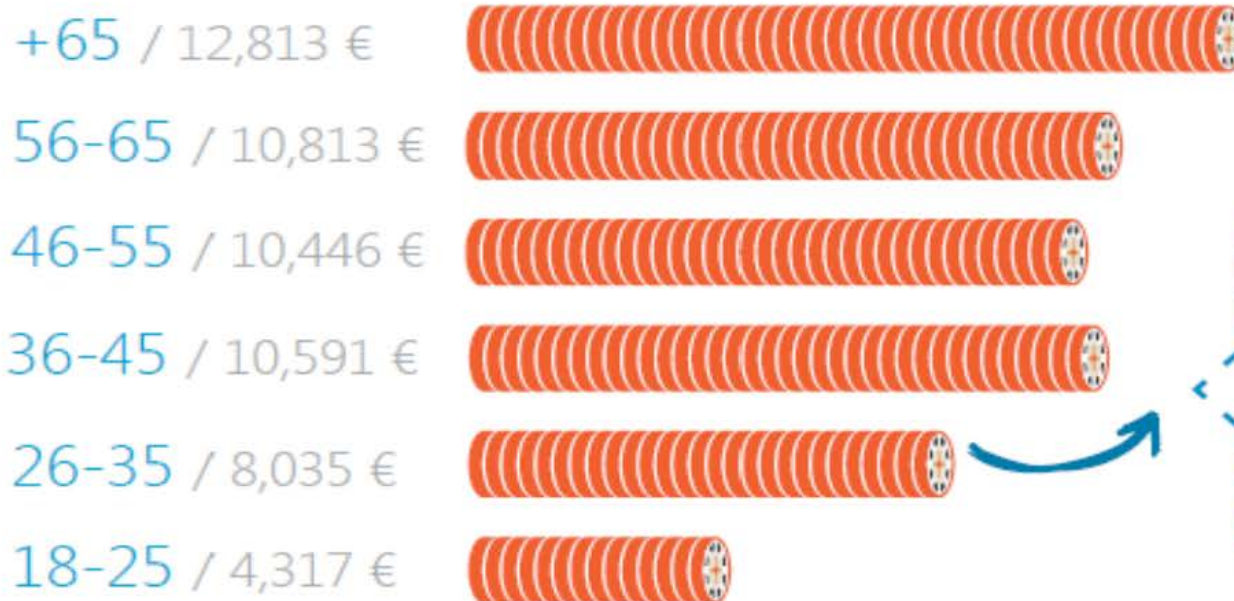


In the **bingo** a woman between **36 and 45** years old.

• How much is played •



* Participation average in 2014



Player participation increases with age, the average participation being

7,769 €

• How much is spent •

448€



46-55
years old

64€



18-25
years old



The average
expenditure
per person is

(243)
euros

261€



Men

123€



Women

Men spend the double of
women spend

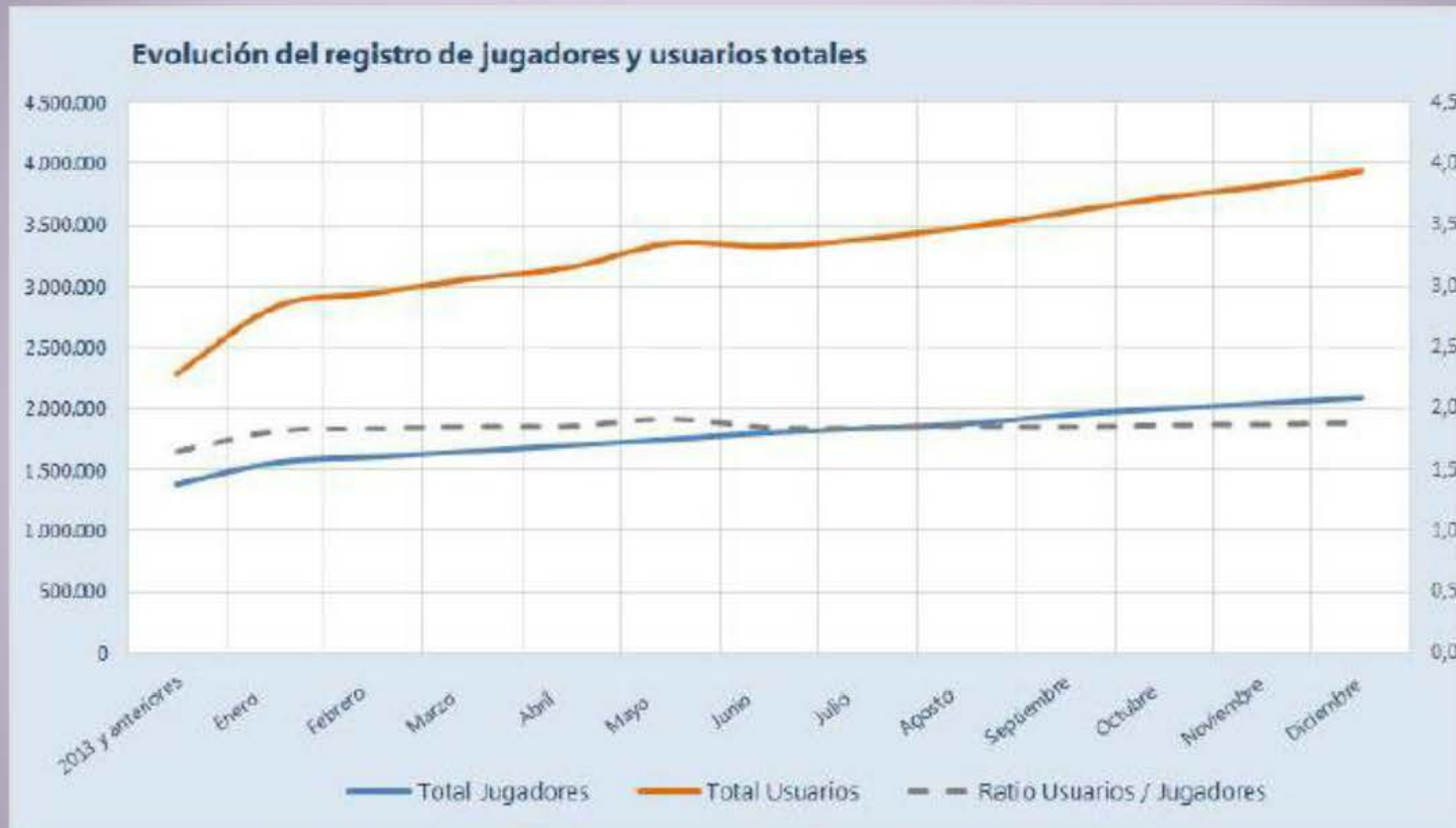
The players between 46 and 55 years of age are those who spend the most, with those aged between 18 and 25 spending the least

4. Delving deeper...



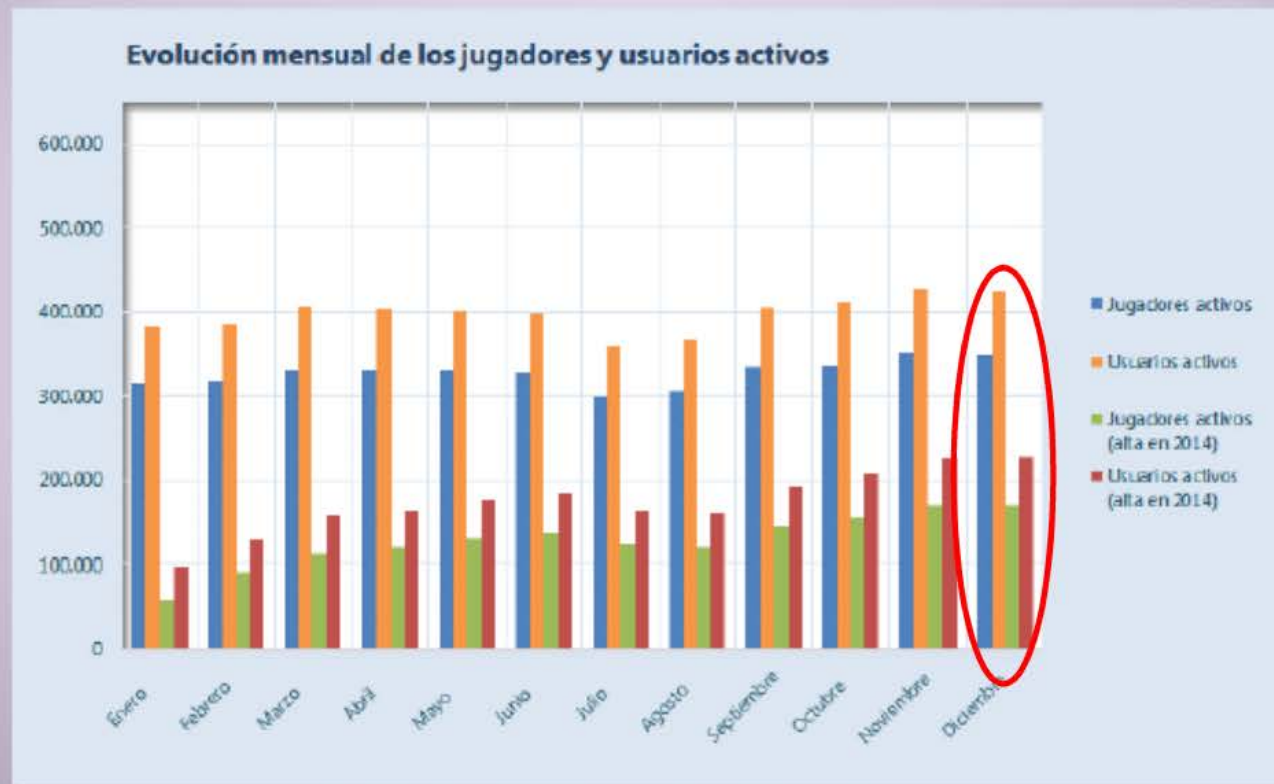
Who plays?

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



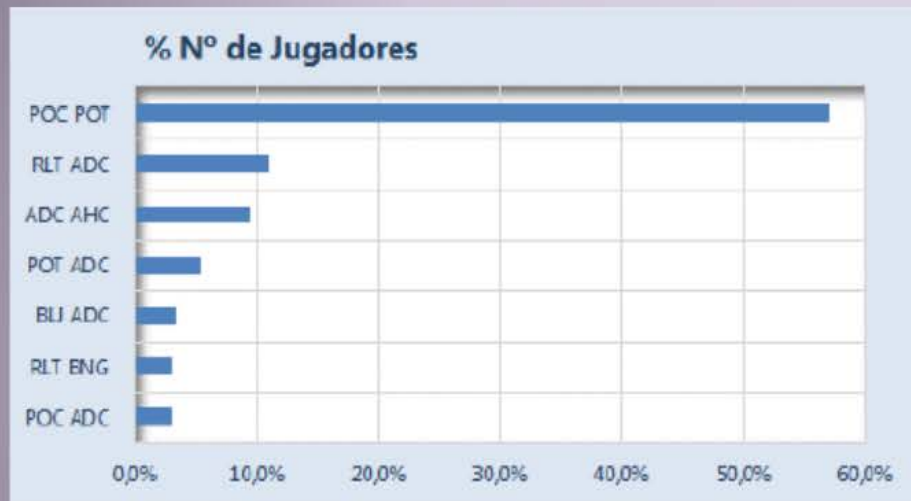
Fixed-odds sport betting: 69%

Poker tournament: 18%

Bingo: 4,5%

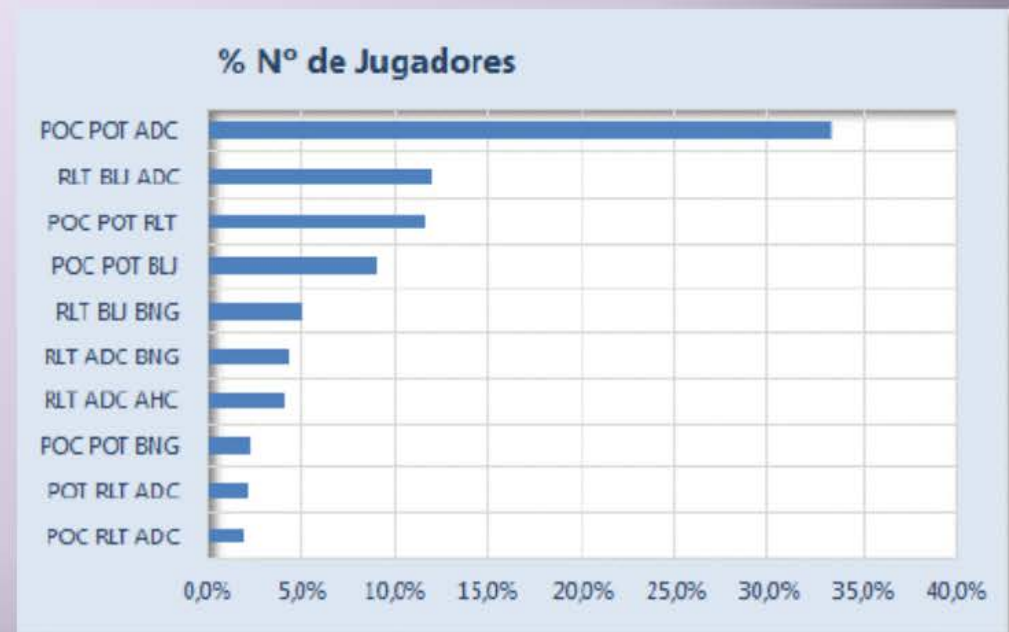
Cash poker: 4%

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



Poker cash-tournament very preminent combination

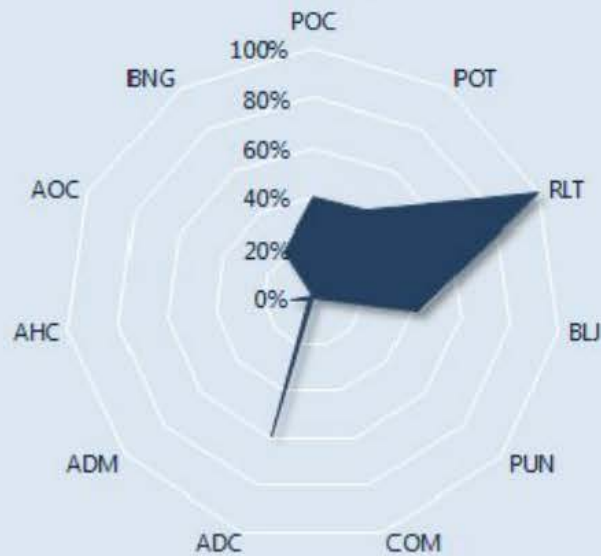
Fixed-odds betting highly combined with rest of games



Game relationships: by player

Relac. Juego	POC	POT	RLT	BLJ	PUN	COM	ADC	ADM	AHC	AOC	BNG
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

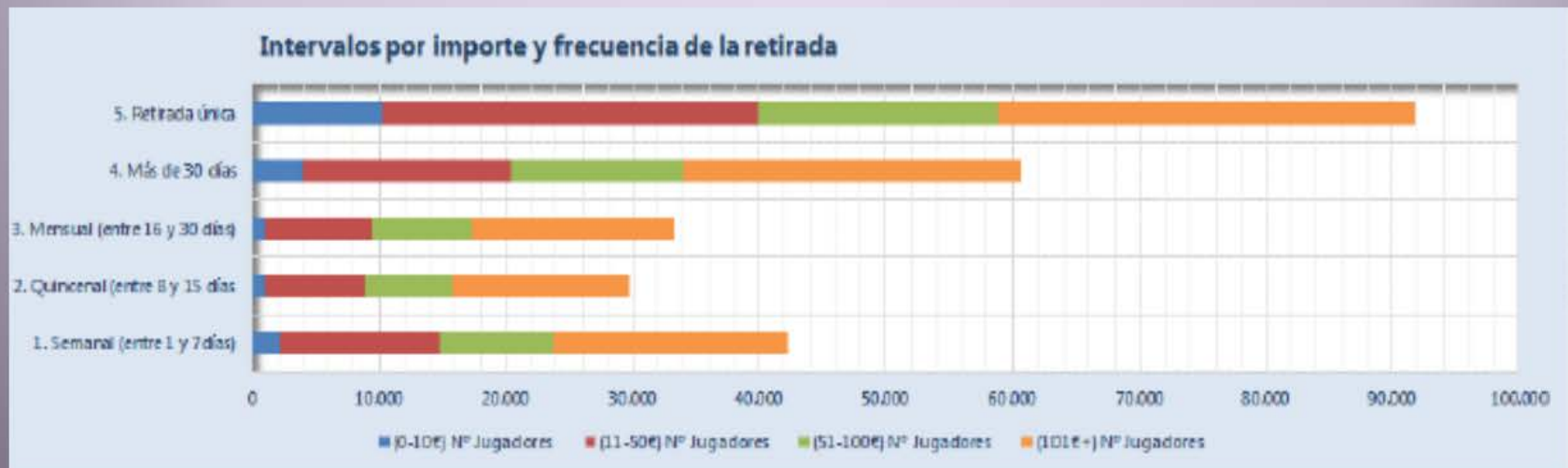
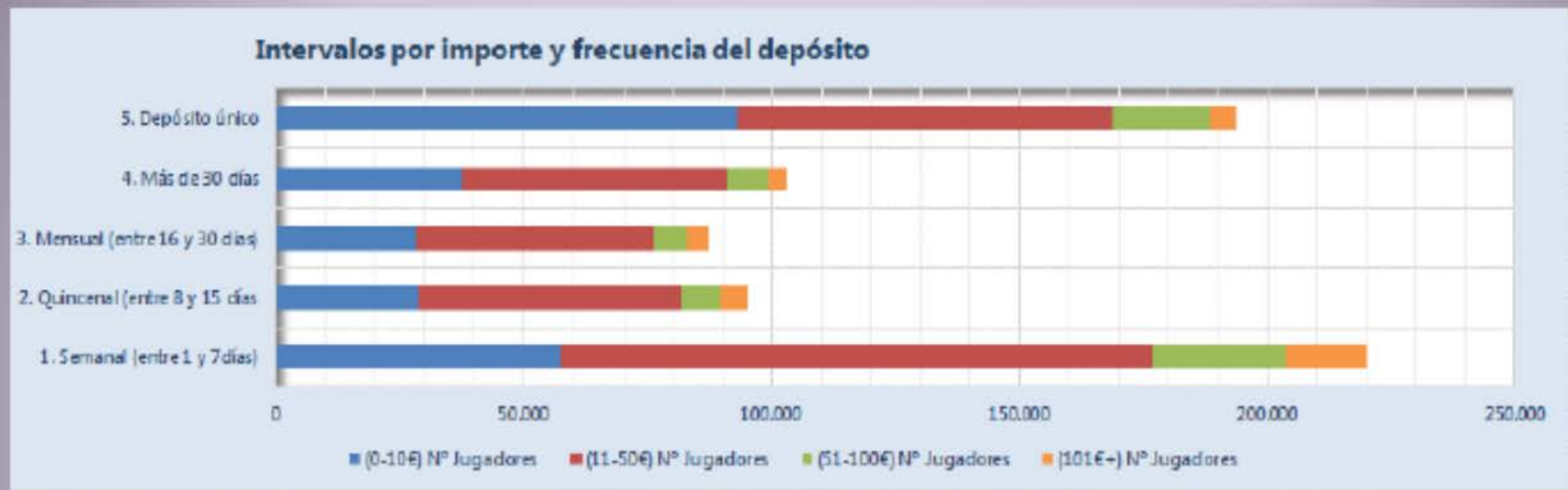
Relac. Juego	POC	POT	RLT	BLJ	PUN	COM	ADC	ADM	AHC	AOC	BNG
POC	100%	33%	23%	11%	0%	0%	31%	0%	0%	0%	1%
POT	264%	100%	61%	31%	0%	0%	80%	0%	1%	0%	2%
RLT	56%	21%	100%	31%	0%	0%	69%	0%	1%	0%	4%
BLJ	118%	46%	163%	100%	0%	0%	127%	0%	2%	0%	9%
PUN	491%	156%	2.811%	1.505%	100%	3%	823%	1%	5%	0%	52%
COM	6.568%	2.136%	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%



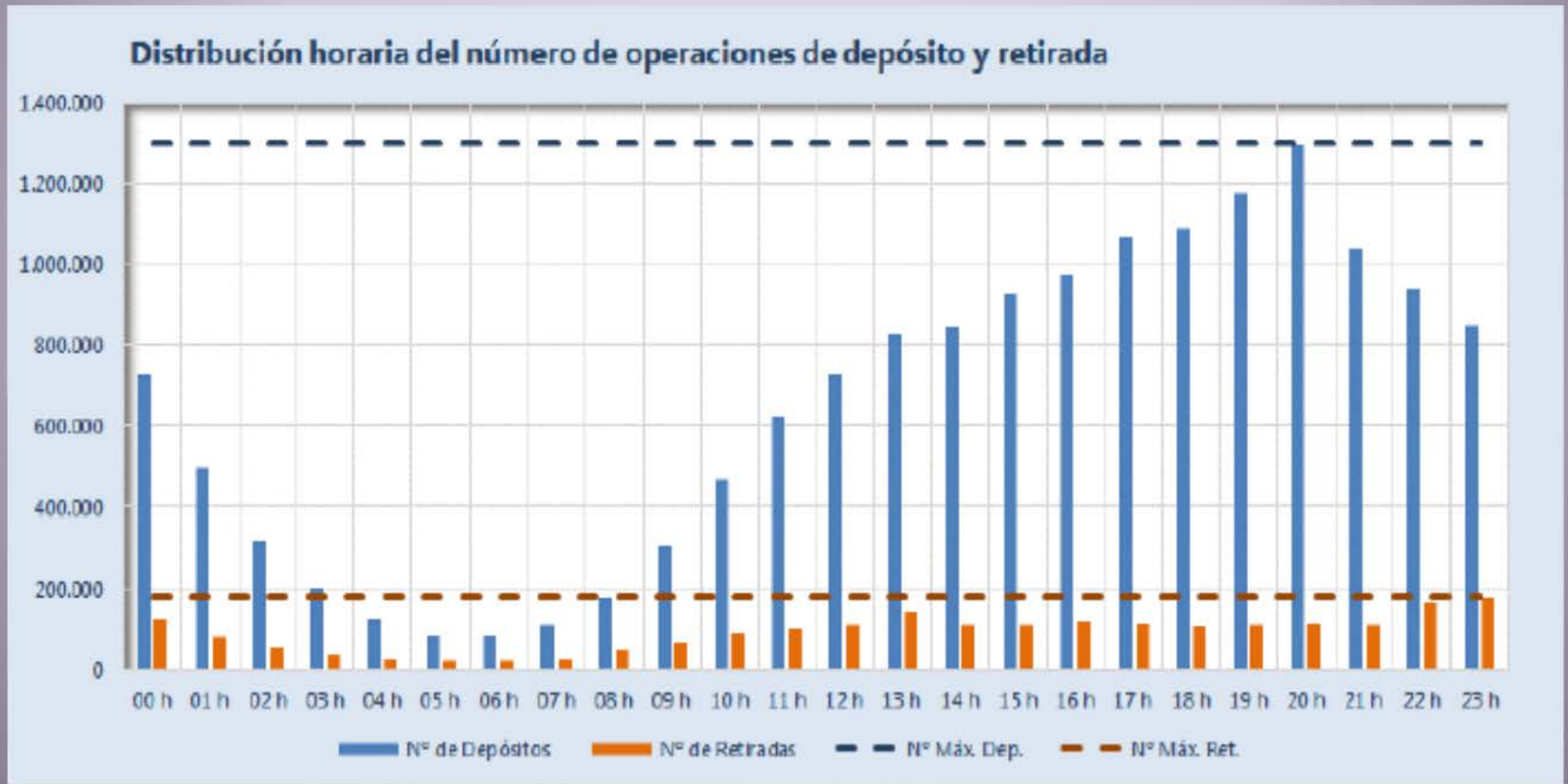


**Deposits,
withdrawals and
player spend**

Deposits/withdrawals: frequency and amount



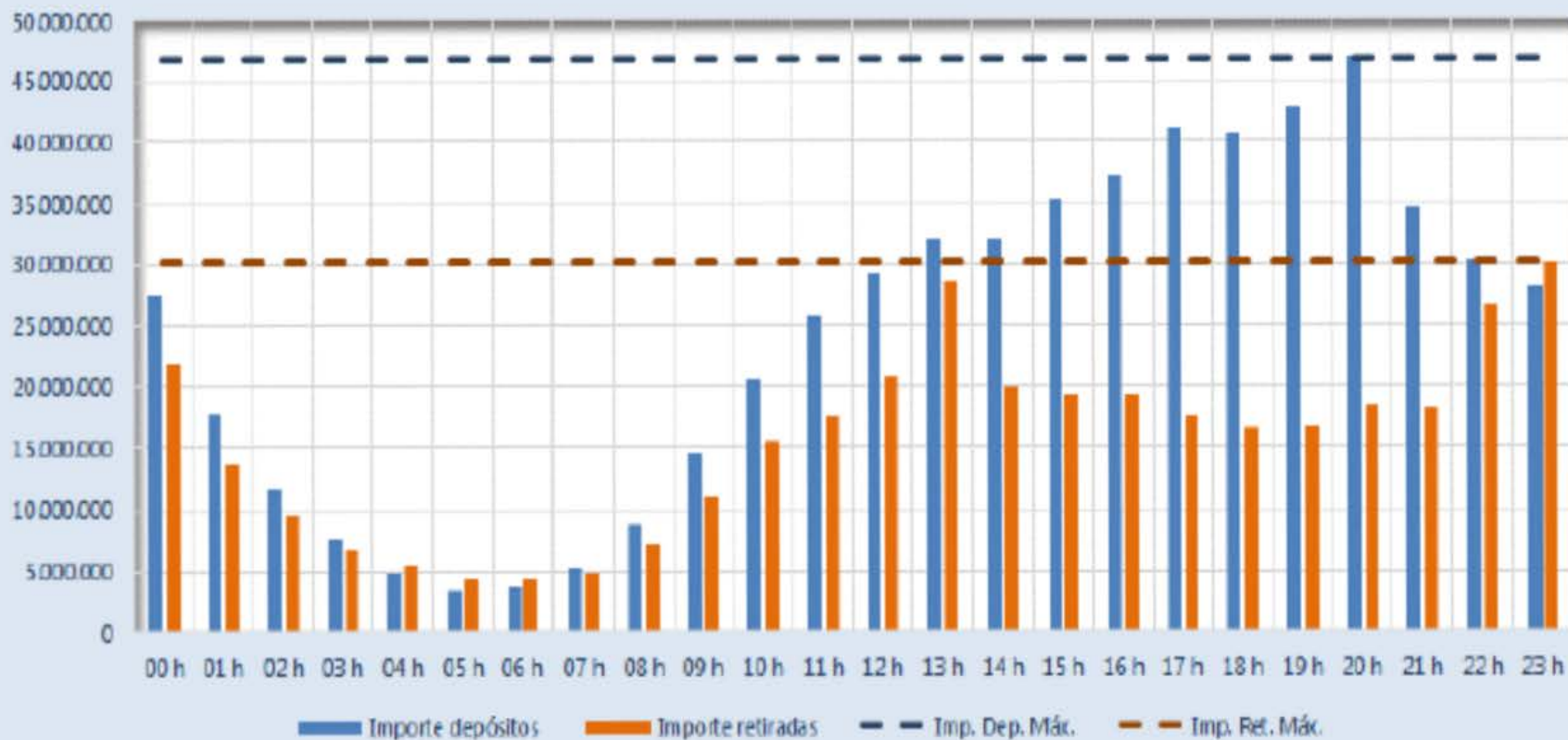
Deposits/withdrawals: hourly distribution by number



Higher activity on evening hours

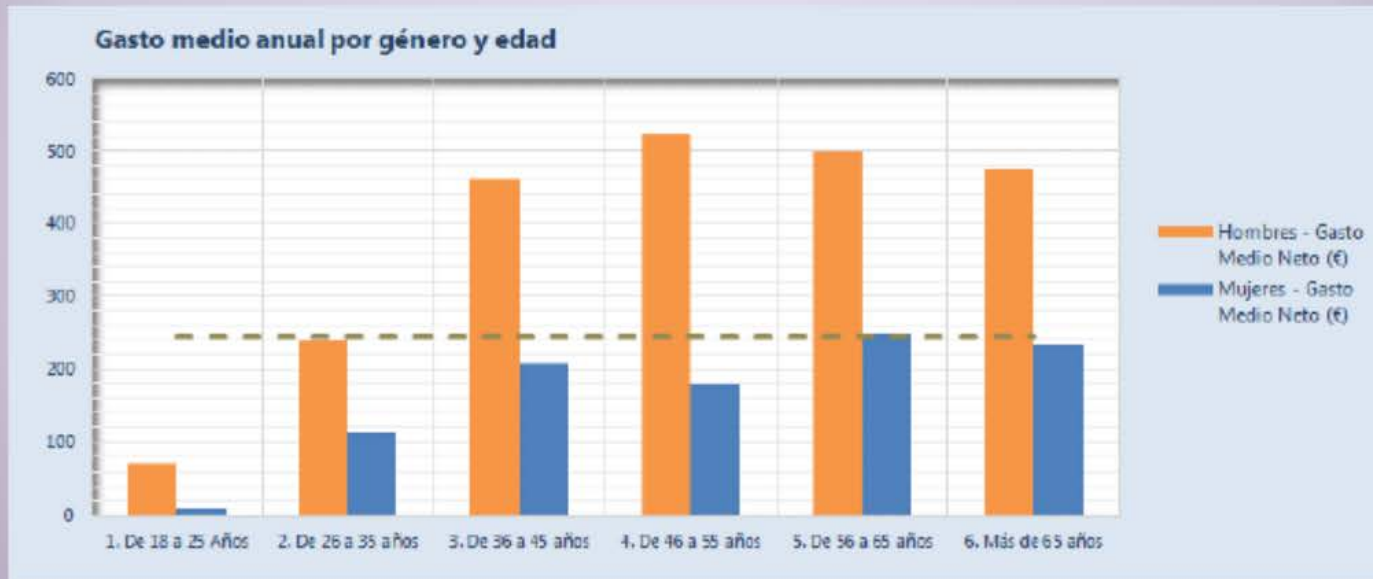
Deposits/withdrawals: hourly distribution by amount

Distribución horaria del importe de operaciones de depósito y retirada



Higher activity on evening hours

Player spend: by gender/age



Male players exhibit a constant greater spend throughout all age segments

P&L distribution

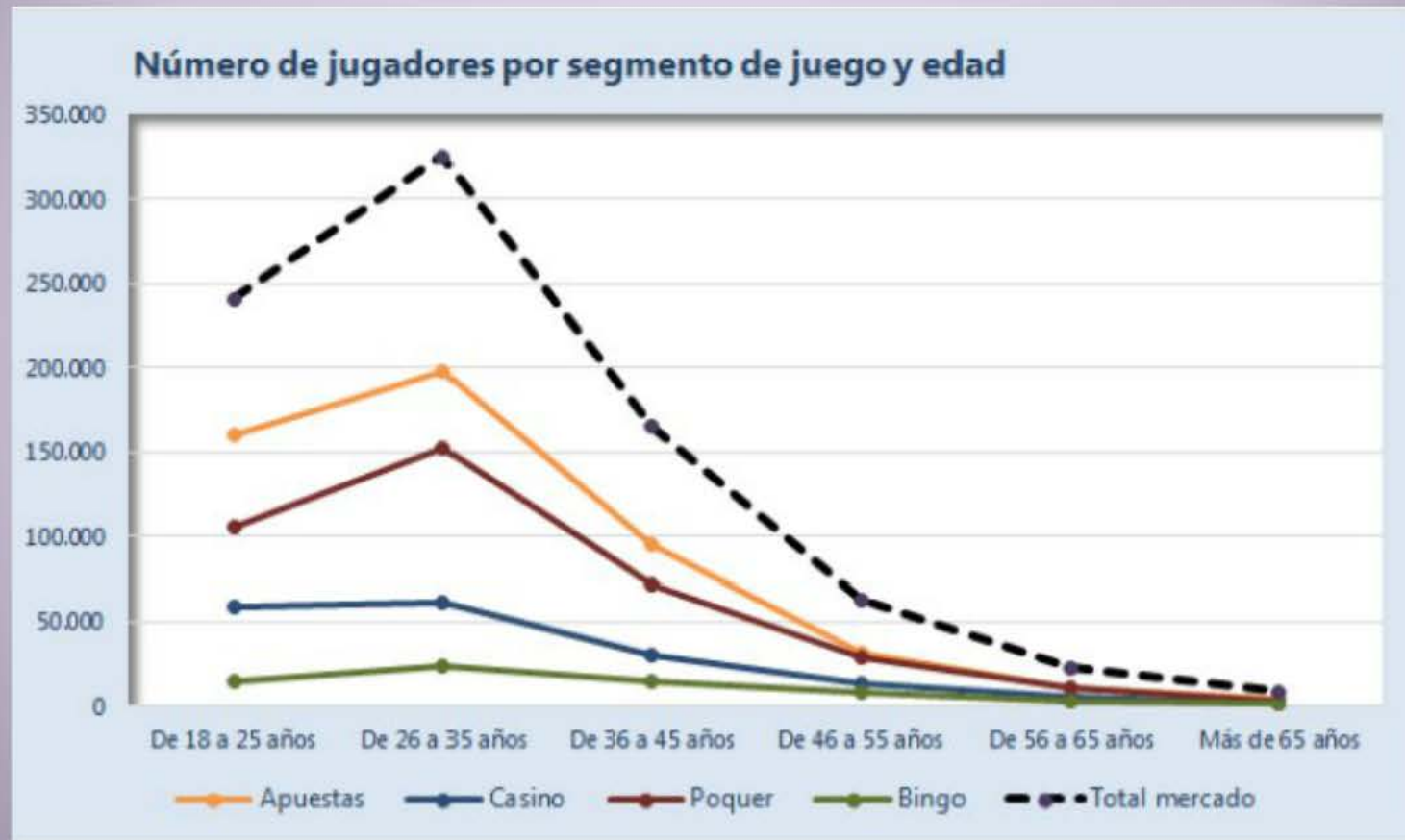


Statistical median for annual player net wealth decrease: EUR 25. 50% players located between EUR 0,15 and EUR 129



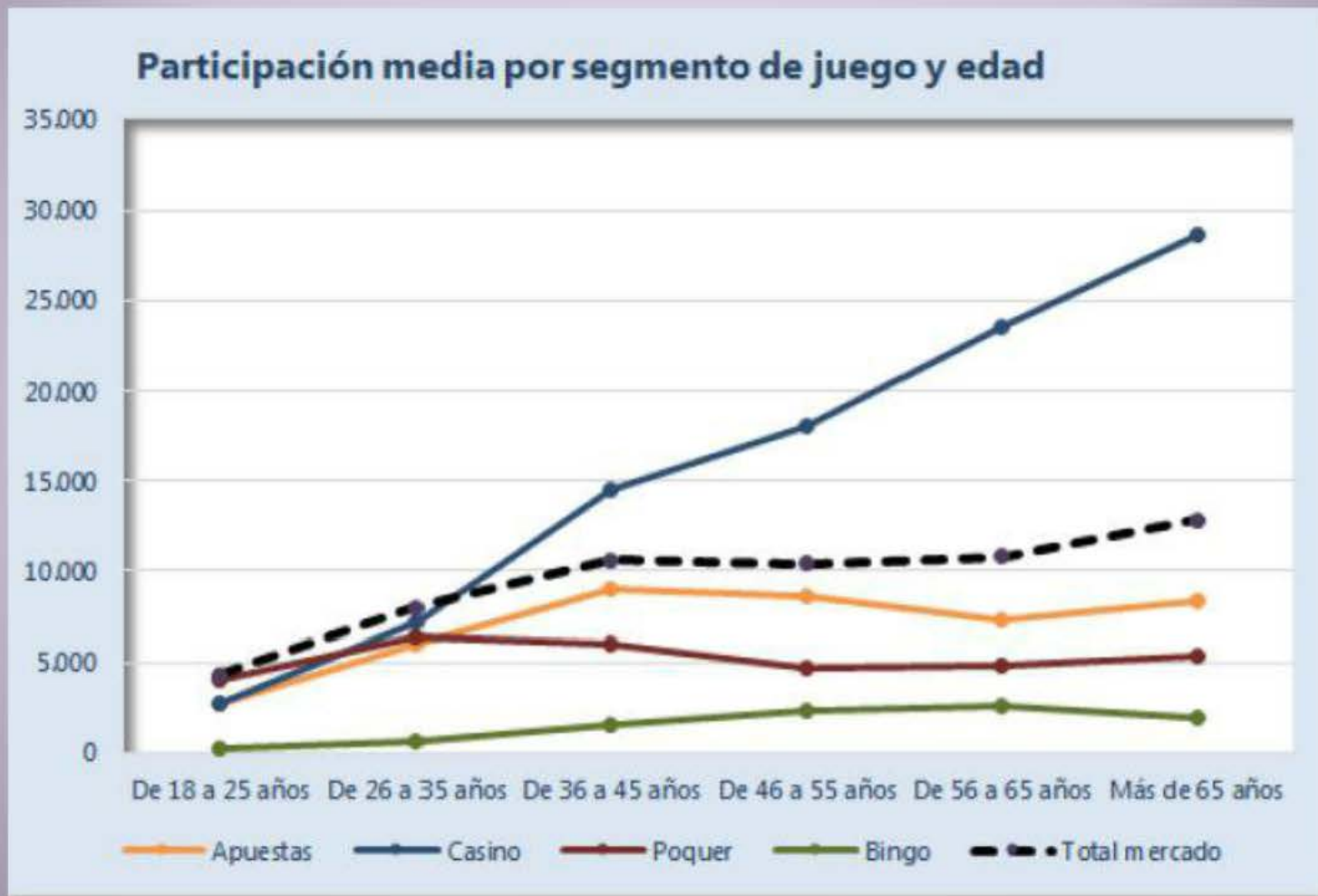
**What games
are played?**

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 Merca	824.026	7.769	7.437	95,7%

Highest RTP yielded by casino games

5. Uses and implications

Business intelligence



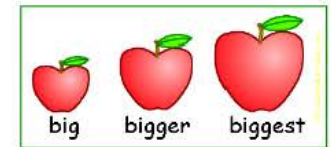
Time series analysis



Policy implications



Comparative exercises



Available @

<https://www.ordenacionjuego.es/en/informe-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!

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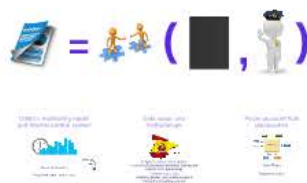
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