

2020 Advertising and Marketing Trends and Tools:

What Tribal Gaming Operators Need to Drive ROI

Presenters: Mark Astone, Strategic Raving Partner, Branding, Advertising and Media Services and CEO, Catalyst Marketing Company;
Vikki Pass, Senior Media Director, Catalyst Marketing Company

Thursday, January 30
8:30 am – 9:15 am

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Catalyst

FRESNO, CA

teamcatalyst.com



CEO

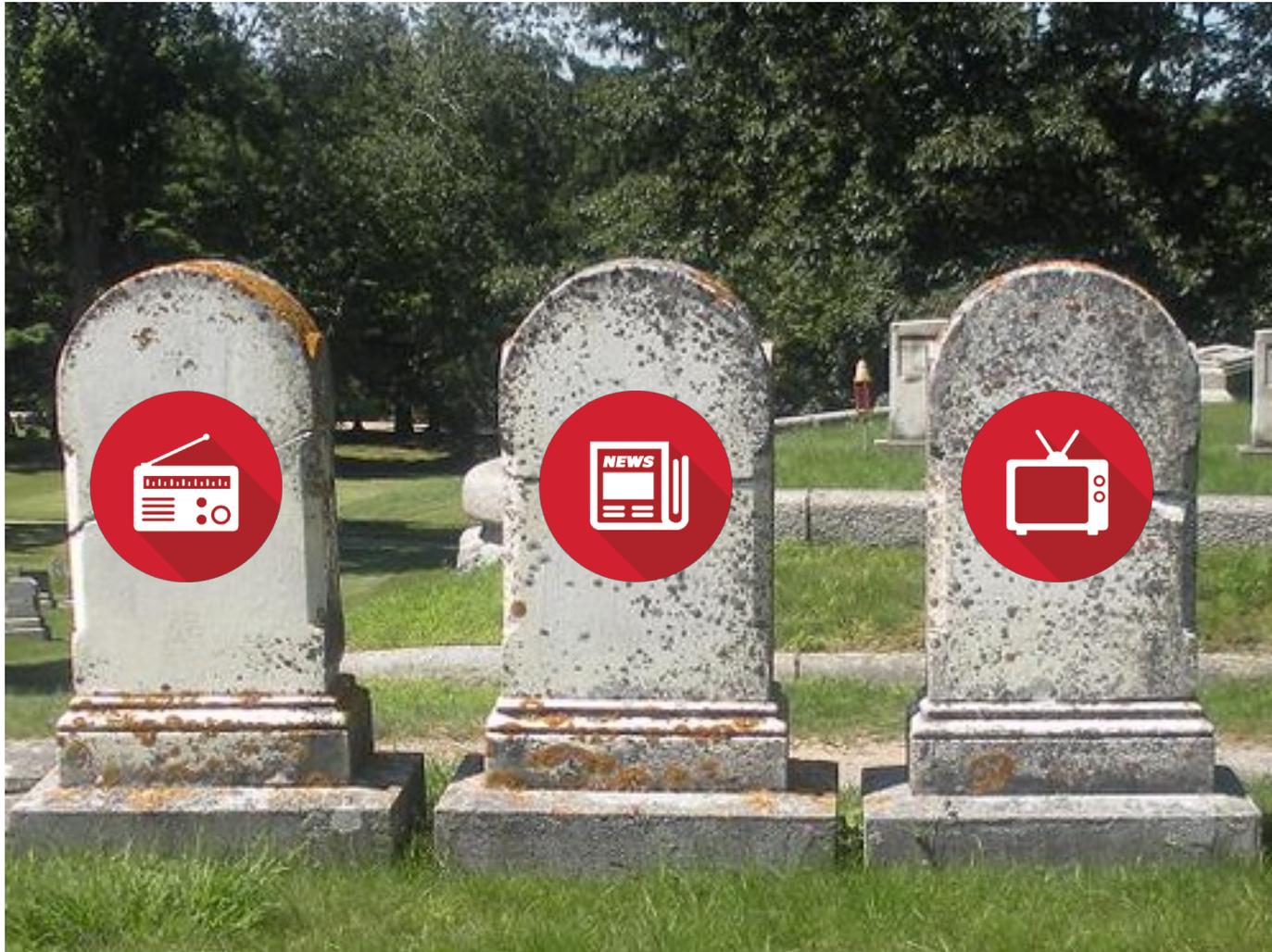


SENIOR MEDIA DIRECTOR

- **MARKETING**
- **ADVERTISING**
- **MEDIA**
- **PUBLIC RELATIONS**
- **SOCIAL**

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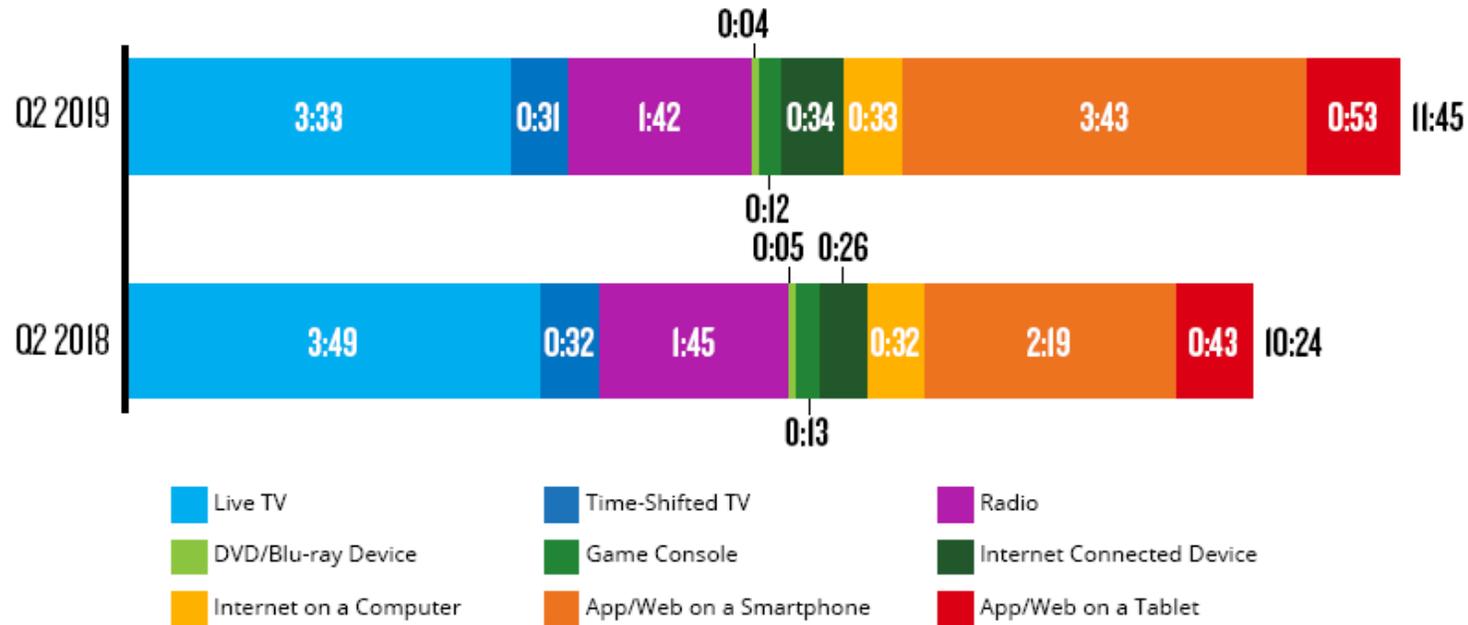
Media Graveyard



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Media Usage

AVERAGE TIME SPENT PER ADULT 18+ PER DAY
 BASED ON TOTAL U.S. POPULATION

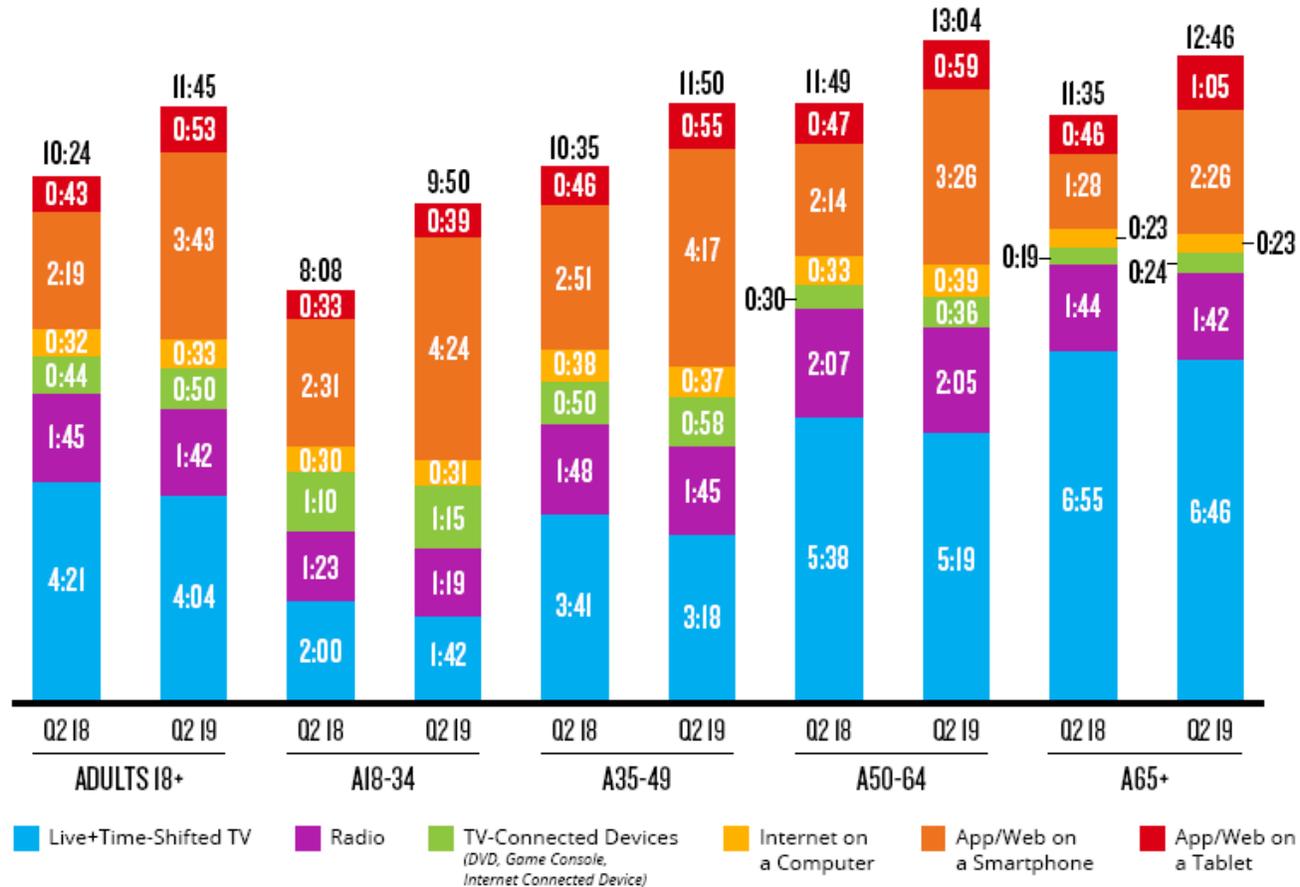


Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel contributed to increases in usage levels beyond pure organic growth.



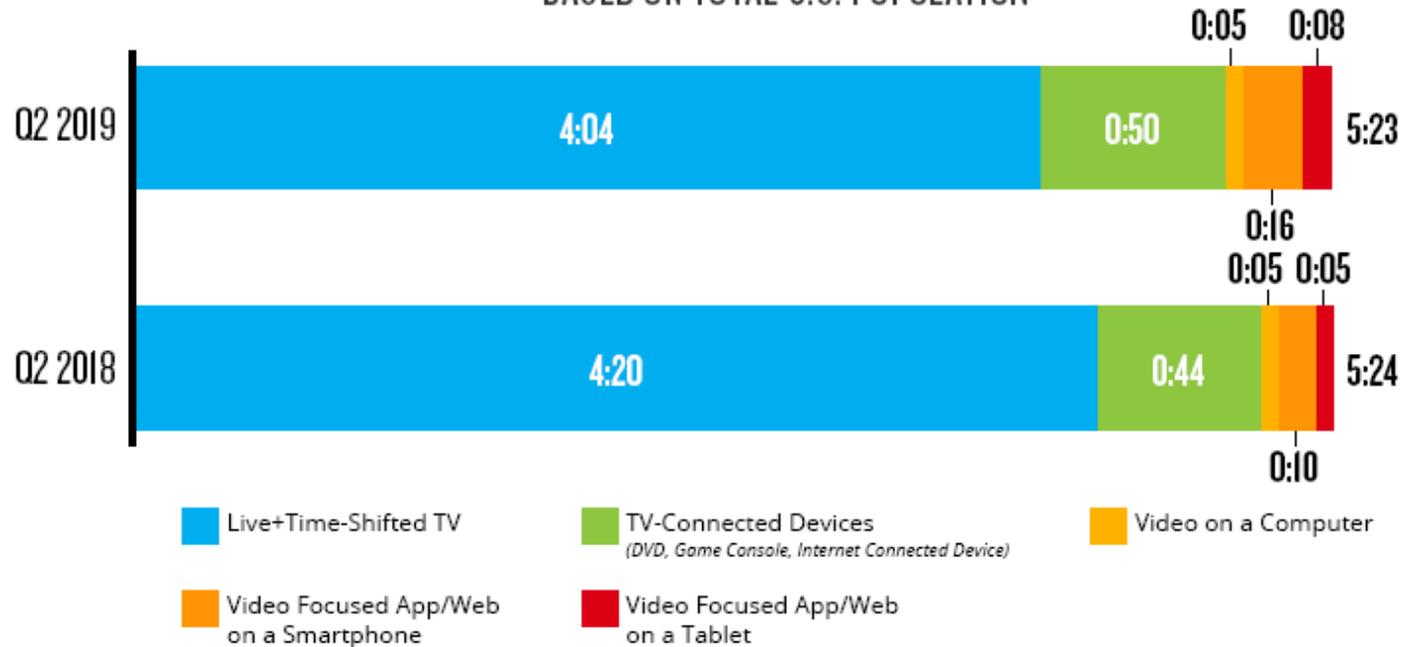
Media Usage by Demographic

DAILY HOURS:MINS OF USAGE
BASED ON TOTAL U.S. POPULATION



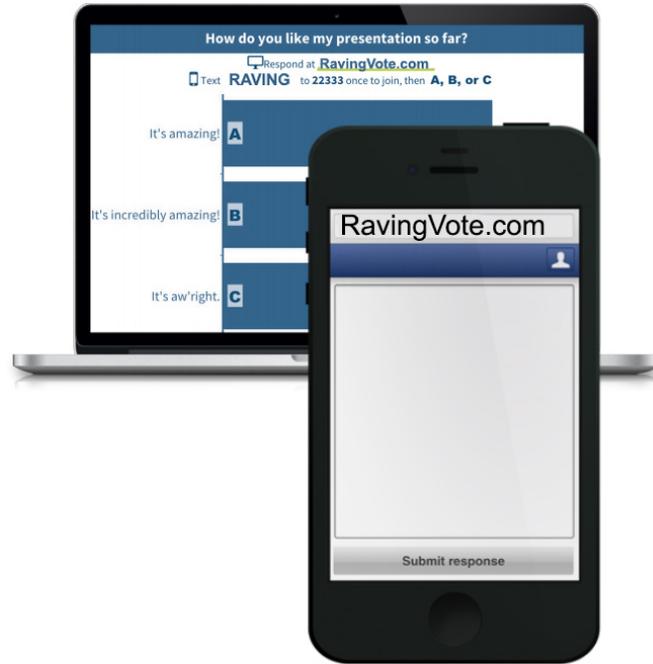
Video Usage

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO
BASED ON TOTAL U.S. POPULATION



Go to RavingVote.com or text *RAVING* to 22333

Web Enabled Device



SMS Text Messaging

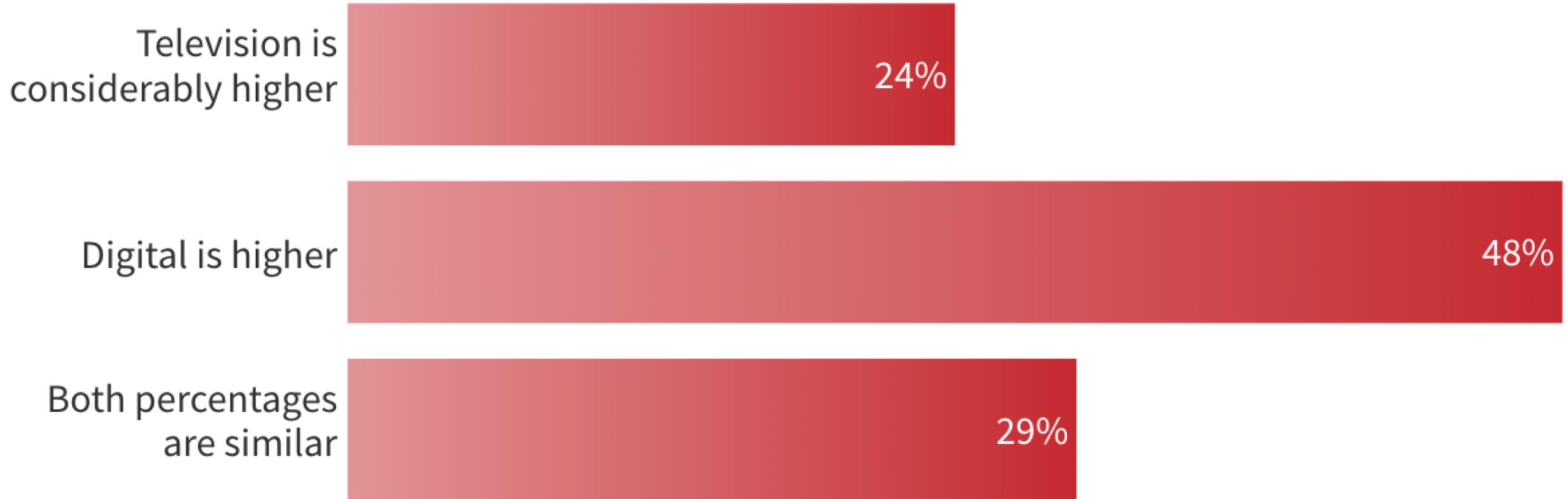


Wifi Access:

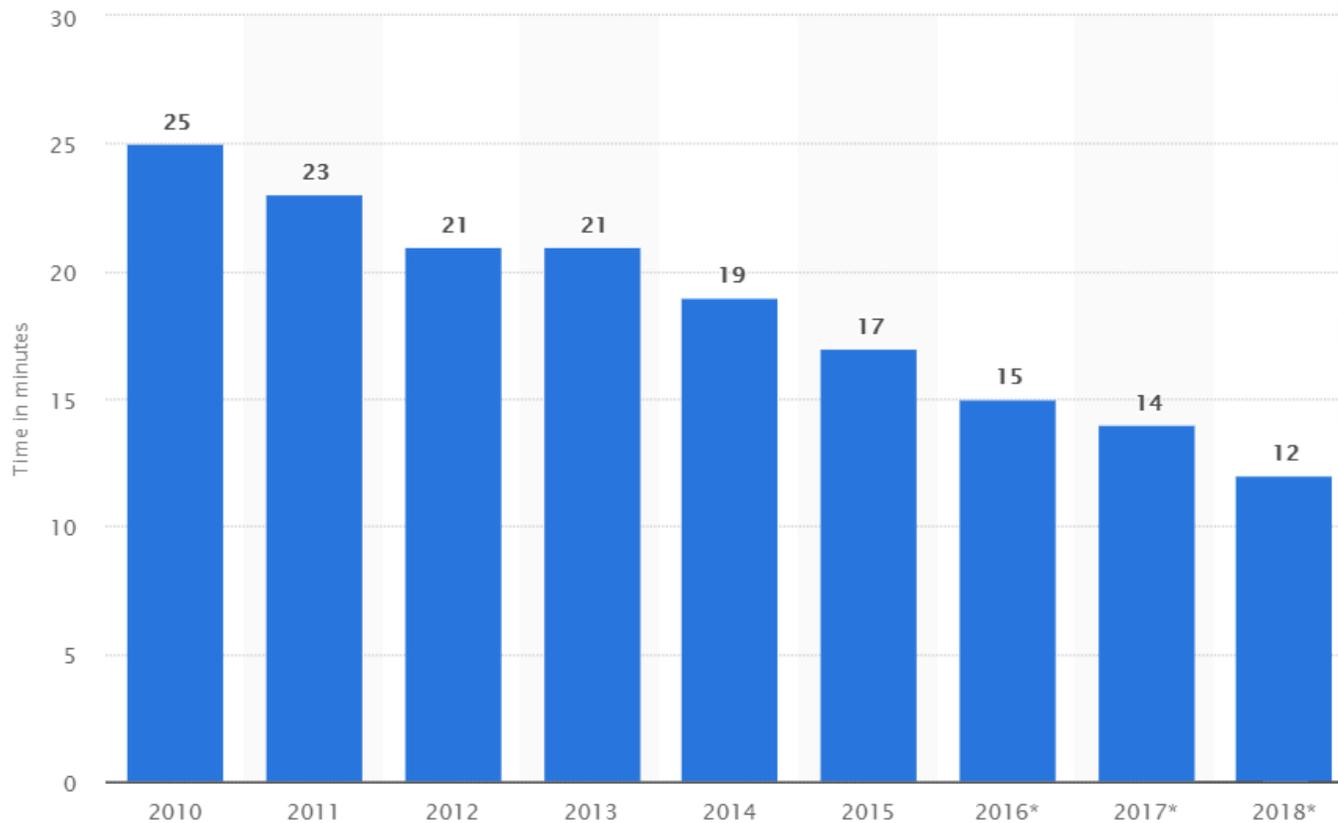
SSID: RavingGaming

Password: r@v1ng2020

What percentage is your digital media budget compared to television?



Time Spent with Newspaper



© Statista 2020

- Time spent down 108% in last 8 years
- Casino gamers – 70%+ don't read any printed newspaper
- Upcoming generation seeks news online

Media Death Exaggerated?



- Yes! Still hanging strong
- Traffic – Vehicles
- Evolving: Streaming



- Maybe not
- Readership definitely dwindling – cost to print will exceed revenue
- Evolving: Digital



- Yes! Still one of the most viewed media – mass media
- High fragmentation – content leading the way
- Evolving: Digital – still a screen

Next year, what will your print spend look like?

Smaller than
last year

100%

Same as last
year

Higher than
last year



TV Reach – Yesterday and Today



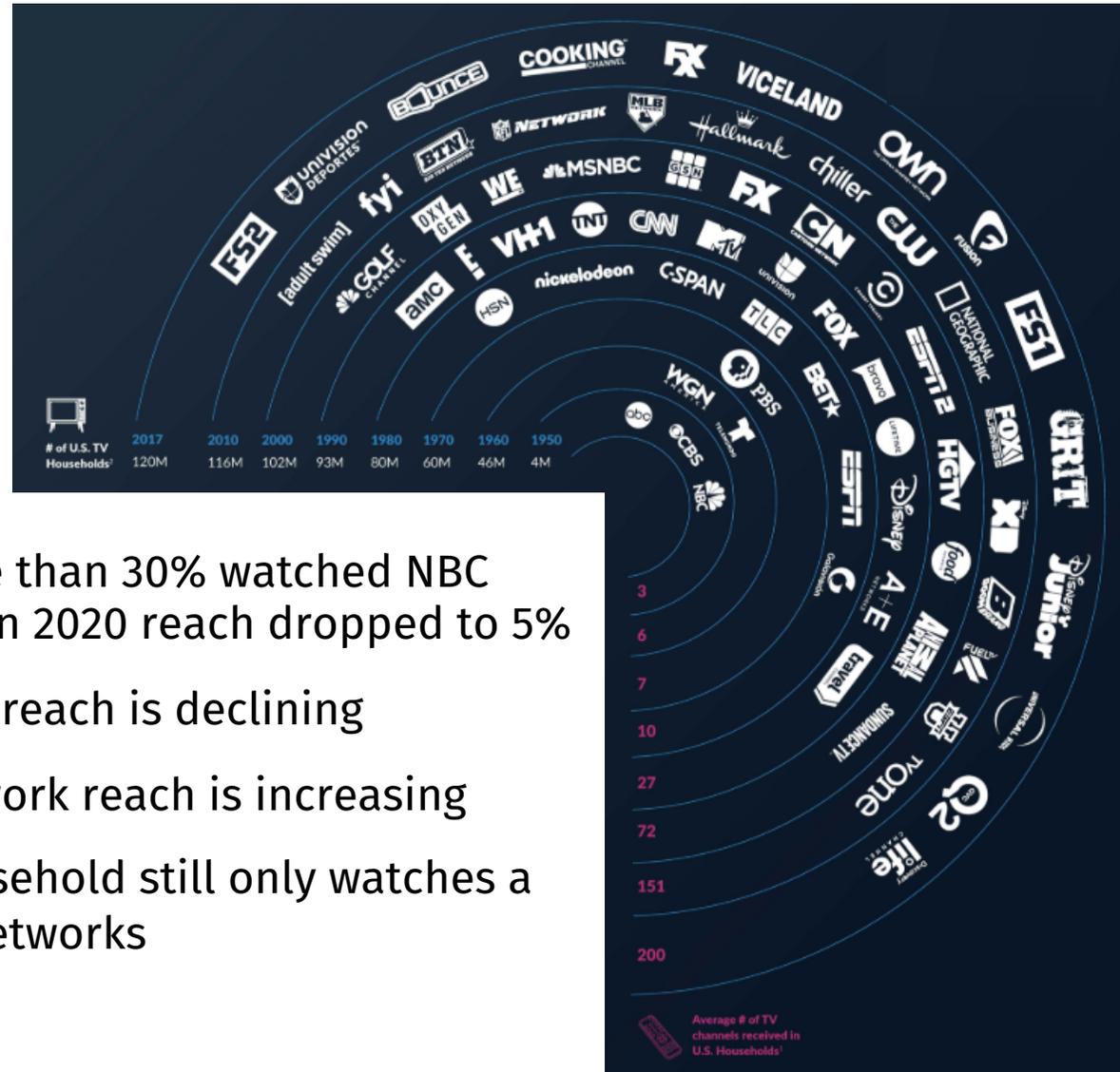
1950 – 1970 – 90% reach with free broadcasts



16-18% reach no longer totally free



Fragmentation of TV – 1950 to 2017



- In 1952, more than 30% watched NBC prime time; in 2020 reach dropped to 5%
- Top network reach is declining
- Smaller network reach is increasing
- Average household still only watches a handful of networks

Fragmentation of TV – 2020



OTT (Over the Top)/Connected TV

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What is OTT/Connected TV

Any TV content viewed over/via an internet connection

Devices



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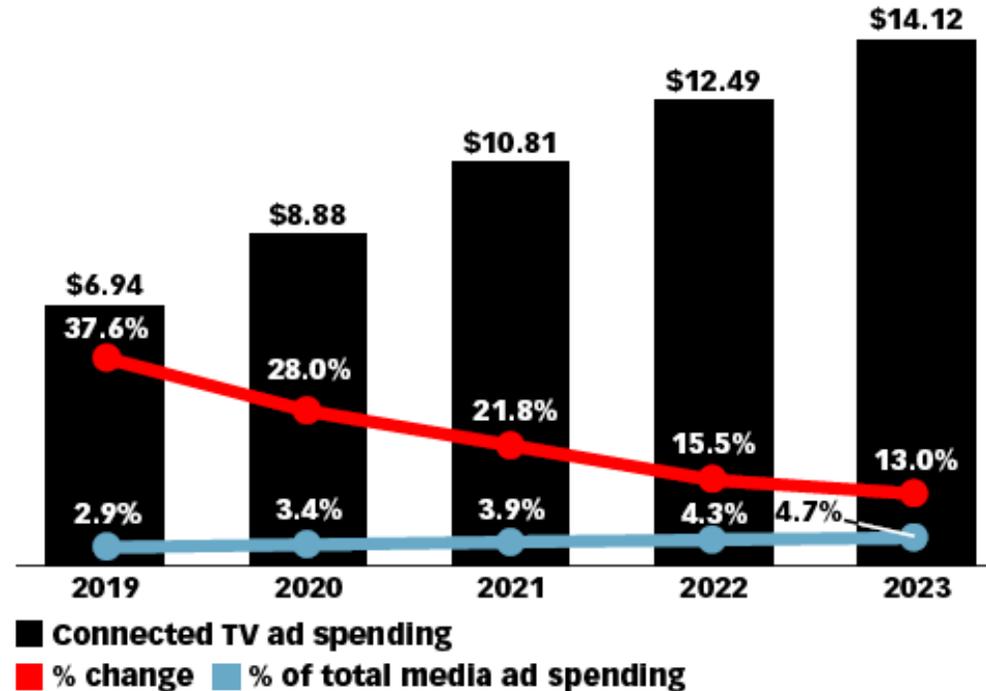
Is OTT/Connected TV part of your current media mix?



OTT/Connected TV Spend

US Connected TV Ad Spending, 2019-2023

billions, % change and % of total media ad spending



Note: digital advertising that appears on connected TV (CTV) devices; includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube; excludes network-sold inventory from traditional linear TV and addressable TV advertising

Source: eMarketer, Oct 2019

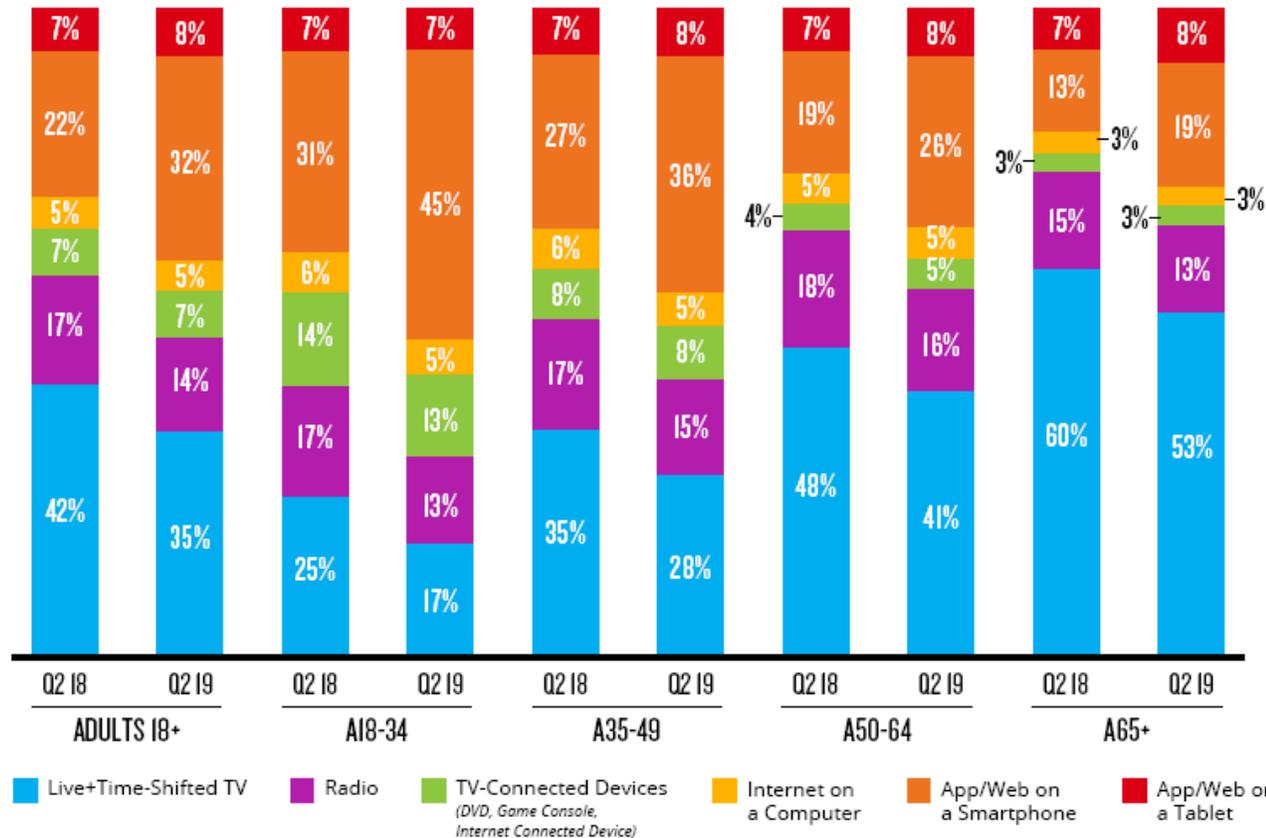
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www.eMarketer.com

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OTT/Connected TV Time Spent by Demo

SHARE OF DAILY TIME SPENT BY PLATFORM
BASED ON TOTAL U.S. POPULATION



- Smaller time spent overall
- Increasing year over year
- All demos participating



OTT/Connected TV – Is It Good or Bad?

Nationally

- Mass reach tougher

Spot/Local

- More targeted the better
- Zip code/county targeting
- Lower out-of-pocket
- Non-skippable
- Appointment viewing
- Stronger reporting
- Attribution measurement

Benefit to Casino Advertisers

OTT/Connected TV can reach your target audience

Broad Reach

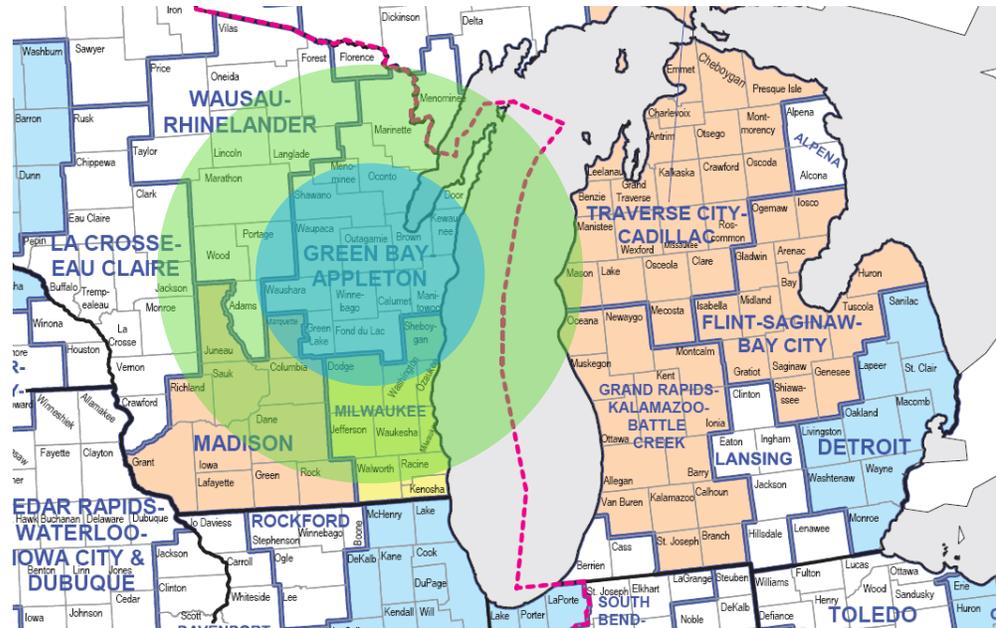


Frequency/Leads



Benefit to Casino Advertisers

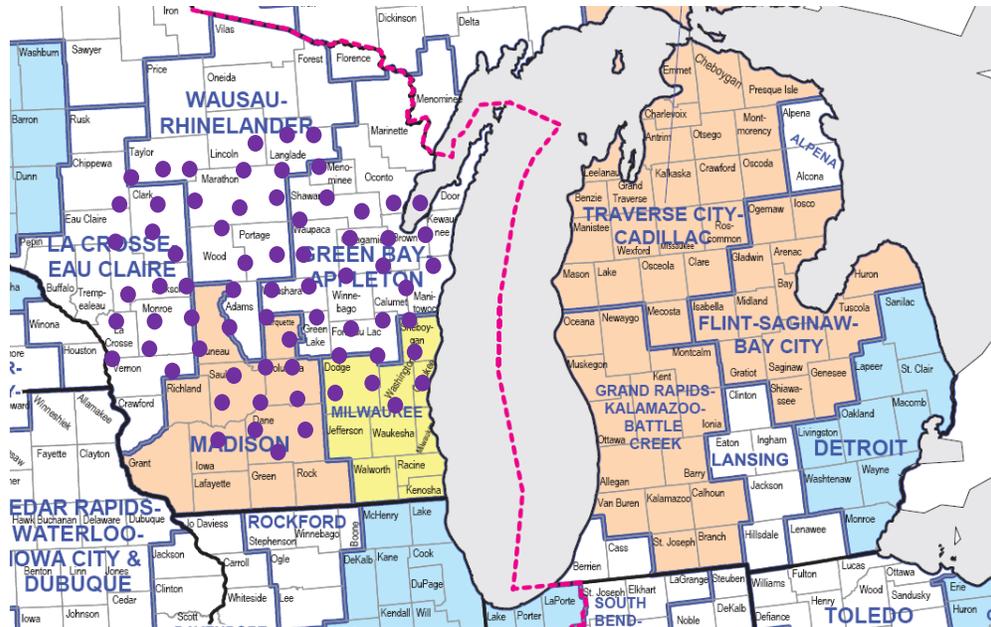
Broad Reach - OTT



- Not held to full DMA
- Similar CPM to TV – lower out-of-pocket
- :15 or :30 messages
- Different weights for different zips/counties
- Different messages

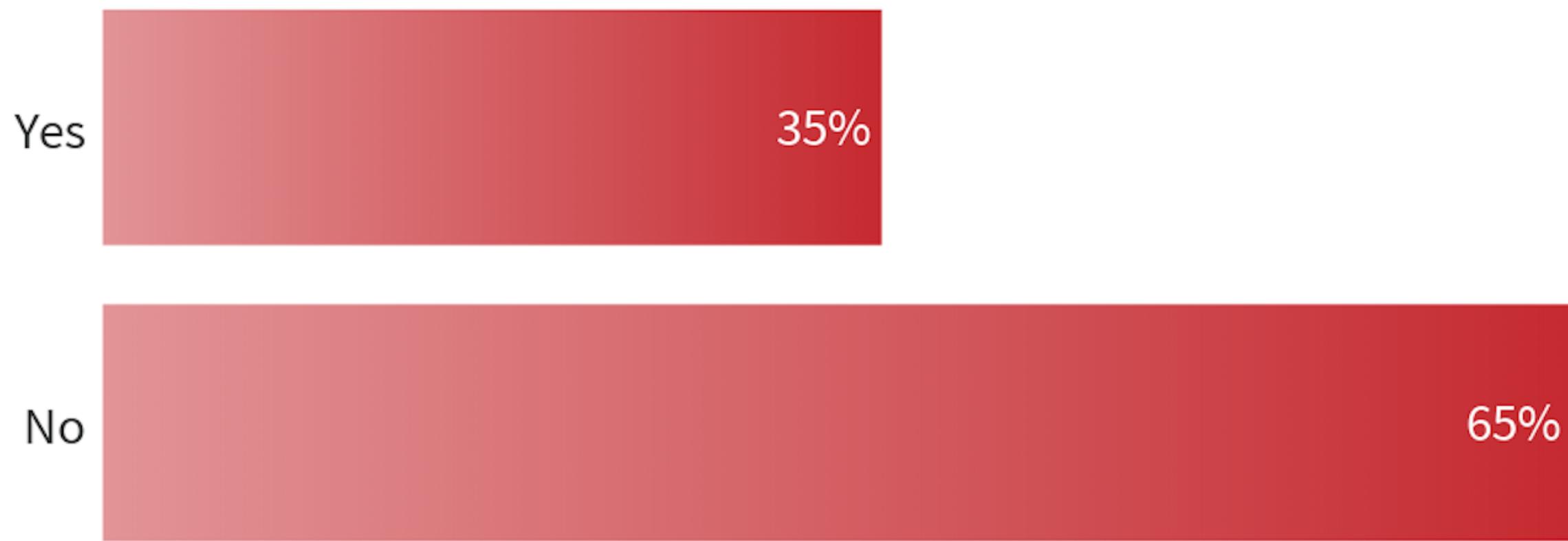
Benefit to Casino Advertisers

Frequency/Leads - OTT



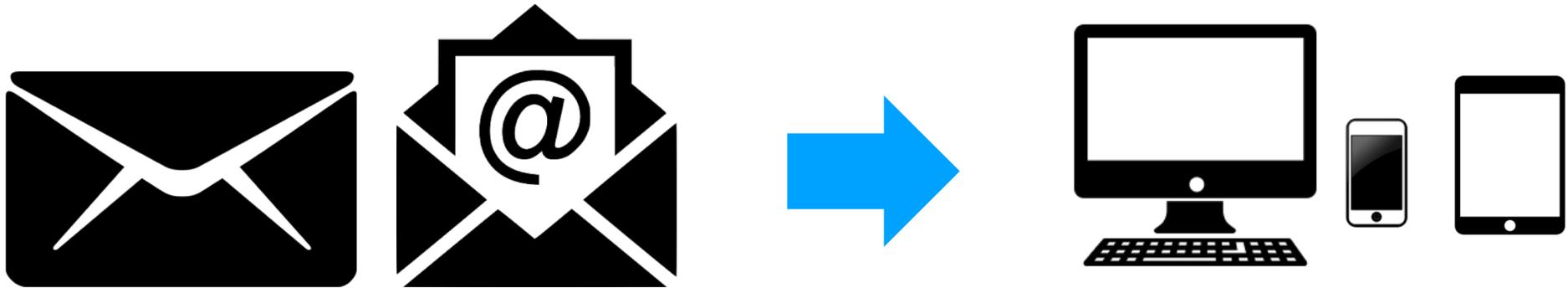
- Reach current database/players
- Additional frequency
- Push for higher revenue – VIPs, in-actives, decliners, ADT, club level
- Unique message – you know who they are!
- Measure response

Are you leveraging your player database to run digital media (broad based digital, not email)?



Leveraging Player Database

Casinos have a unique advantage ...



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Addressable Geo-fencing/IP Targeting



Physical Address

Places geo-fence around physical location



IP Targeting

Physical Address/Email address

Uploads to alternative database to locate IP address



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Leveraging Player Database

- Increase trips
- Increase hotel stays
- Increase theo and ADT
- Increase ticket sales
- Limitless ...



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Few takeaways ...

- Consider reducing print spend
- Utilize OTT to your advantage ... but not at the sake of the TV budget
- Leverage your player database digitally