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The Innovation Group Releases 2012 iGaming White Paper Update

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Groundbreaking study summarizes most extensive research to date regarding overlap between free play, real money and land-based players, inducement & player development strategies, specific impacts on lotteries and other key topics specific to online gaming in the U.S. Copies will be available at the Innovation Group booth at this week's Indian Gaming 2012 Trade Show (NIGA).

For the second time in two years, The Innovation Group, the premier provider of consulting and management services for the gaming, entertainment and hospitality industries, has released an industry-leading white paper specific to the potential of the online gaming segment in the U.S. Such self-funded research efforts are a key component of The Innovation Group's overall interactive advisory strategy and an educational benefit to the industry-at-large. Initial findings of quantitative research conducted by the firm were first revealed in association with the firm's iGaming North America Conference in Las Vegas in March; the full report is now available on the company's website, www.theinnovationgroup.com. And copies will be available at the Innovation Group booth at this week's Indian Gaming 2012 Trade Show (NIGA).

A related study to analyze the demographic of the online gamer and evaluate the relationship between online and landbased gaming was first released by The Innovation Group in 2010. Specific to the 2012 research, the firm opted to focus more extensively on the impact of both free play and real money gaming

on landbased gaming, the importance of association of a web site with various gaming entities, and the specifics of inducements to play at both a casino web site and to induce play from a web site to a land based casino. The Innovation Group also targeted questions relating to the impact on lotteries and devices used.

Another key focus of the 2012 study was assess the extent of overlap between landbased gaming, free play and real money online gaming. The findings helped further The Innovation Group's understanding regarding the proportions of landbased gamers that already play online either (in the form of free play or real money gaming), as well as the numbers of real money online gamers that visit landbased casinos. This must-read white paper, in association with the survey data from The Innovation Group's 2010 study, helps identify these relationships and perhaps predict the effect that legalization of online gaming would have on landbased casinos, a key concern of many landbased operators.

More specifically, the survey helped address such questions as:

- Who are internet gamers?

- What type of games do they play online i.e. free games, games for points and prizes, real money games?

- What games do they play online?

- What proportion plays casino type games online?

- How do they compare to "bricks and mortar" gamers, and what is the level of crossover?

- How would legalization of real money gaming affect "bricks and mortar" casino play?

- Importance of web site association with land based casino or state lotteries.

- Typical demographics.

- Frequency of wagering-number of sessions.

- Amount wagered by session by game type.
- Importance of free play games, impact on land based casino visitation.
- The characteristics of a web site that players feel important.
- Characteristics important in selecting a real money gaming web site.
- Offers that would induce people to visit a land base casino related website and in turn to visit the associated land based casino.
- How do people find an online gaming site now?
- Devices used for online gaming.

Visit www.theinnovationgroup.com to download a copy of the report, noting that the data included is at a summary level. Options for additional, more detailed analysis by region or by specific characteristics are myriad; in fact, The Innovation Group has already been engaged to provide enhanced research for a number of existing operators throughout the U.S.

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