



Comedi

Presentation to

The SRA Committee

April 25th 2005

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Corporate Overview

Comedi offers a complete range of communication solutions, delivered by a team of experience specialists, with a single goal in mind:

**The Effective and Efficient
delivery of measurable results.**

M e a s u r a b l e R e s u l t s

We Provide Solutions

At Comedi

At Comedi we pride ourselves on our ability to understand our client's needs and the needs of their clients.

We have the extensive experience in research, strategy design, execution and media that will make the difference.

Consultative marketing and concept development that gives you the when, where, and to whom you should communicate.

Combined experience of 60 + years in marketing research, both as users and creators.

Research is the tool that leads to rationale decisions.

Previously Said

- Commence with your market research, particularly with the on-line customers.

Look to the customer.

They will help you grow existing business and they will help you grow new business.

- Look to develop long-range plans, communication for 12 to 36 months. Move away from the one-hit wonders, build an integrated multi dimensional campaign designed to build revenues.
- Develop integrated tactical plans, for each of the key customers groups that work both independently and together.
- Look to other revenue opportunities utilizing your existing content. *New games, New channels. New strategic partners who are forward thinking*

We can help you in all aspects!

What We Know Today

- 2% to 4% of all Canadians participated in on-line gaming last year.
- Revenues in on-line gaming equaled movie revenues.
 - 46.3% of internet users participate in games on-line with an average of 115.2 minutes per month.
 - 1800 active sites and growing
 - Decline in Slots and Casino revenues.
 - The banks consider online gaming as an explosive and solid investment sector.

This is a global opportunity or problem depending on how you view it.

Simon Avery Canadian Business The globe and Mail
GMP Capital Corp.

What We Know Today

- Current On-line sites yield \$8.8 billion dollars ('04) expected to be \$10.4 billion('05) and \$12.6billion in 2006
- Expected to grow 10 fold in this decade with annual growth of 23%, yet, reported 37.1% (as of Jan1 2005)
- Wireless applications will drive these numbers even higher and will create even more games.
 - Horse Bettors will bet in any gaming sector
 - Poker and Horse betting are more compatible easier to convert than Casino and other games.

Skilled Gaming (player driver, higher skill set) expected to see significant growth and to lead the way over the next 3 years

Jupiter Media Metrix
GMP Capital Corp.

Customer Sources

Tracks

Larger Take
Slots
Rural based
Venue Revenues
Cash

Influencing Factor
The Horse

OTB

Smaller take
More Locations
Satellite based
Franchised locations
Cash

Influencing Factor
The Bet &
The Horse

On-line

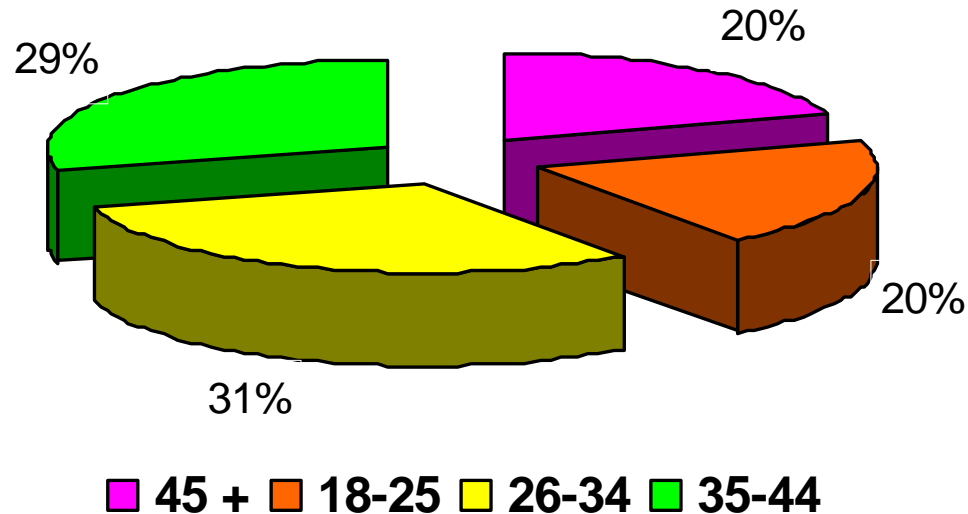
Smaller Take to None
Global
Growing
Anywhere Anytime
availability
Various Payment
Options

Influencing Factor
The Bet

What is similar and what is unique to each

Profile

Demographic Profile of The On-line Gamer



80% are 18-44 yrs of age.

How does this compare to OTB and Track customers?

The 50+ market are the fastest growing segment in internet usage...how will this affect you?

Why & What You Want/NEED to Know

Who are your customers?

How do they interact with you?

Where else are they?

How we can communicate with them?

Frequency?

What is the % of erosion, crossover and or conversion opportunity?

What motivates them to spend?

Why You Need to Undertake this Research

To Survive and To Grow!

Methodology Proposal

- Qualitative examination of the Off Track Bettor and On-line Bettors through personal interviews and traditional focus groups.
- We are also proposing an on-line component utilizing the largest online panel available in Canada.

Off-Track

- Select group of sites that meet pre-determined criteria.
Size, location (proximity to a track) geographic demography
 - Daytime and evening
- Recruit a sample (15 to 20 per location) with an estimated final number of 8 and then conduct a structured focus session with them.
- We in conjunction with the SRA will develop the questions to be asked.

The selected group would be paid for their time and potentially provided with coupons redeemable at the local track where possible.

Methodology Proposal

On-line

- Full on-line survey utilizing the Greenfield panel in Canada (300 gamers primarily in Ont.)
 - Questionnaire of approximately 30 questions.
 - We will include 3 open ended questions.
- We will work together to structure the questionnaire ensuring the the information is appropriate.
- We would also recommend soliciting a focus group of individuals who have participated in on-line gaming including poker, pari-mutuel, and sportsbook.

This can be done through traditional and online media.

Budgetary Overview

The following are estimates based upon the proposed methodology and would be confirmed upon finalization of requirements.

Research

\$ 31,785.00 Focus Groups (Off-track and On-line)

\$ 12,500.00 On-line survey (full panel)

\$ 7,750.00 Reporting and Analysis

\$ 52,035.00 Cost of Research

\$ 6,500.00 Incentives (paid in advance of event)

\$ 8,900.00 Recruitment (email list and radio ads)

\$ 3,250.00 Administration & disbursements materials

\$ 18,650.00 Cost of Variables

All costs quoted exclude Taxes where applicable

Conclusion

Our recommendation to undertake a varied form of research (methodologies), is designed to provide **the best qualitative results** and to ensure the statistical tolerance, and validity of the study, while accommodating a diverse customer base both geographically and demographically.

We want to provide an in-depth profile of your customer and how to communicate with them for maximum results.

Our participation Will:

Secure information necessary to move forward
Develop a strong and beneficial marketing and communication program.

and Execute a quality program that will deliver your objectives.

Thank You

Appendix

Other Team Members

Our Team

Claude Heinman

*Research Partner
Totum Research*

Claude began his career in market research in South Africa, working for research providers and for clients. He took on the role of Director of Marketing Services for Reader's Digest which brought him to Canada, where he continued his career with Reader's Digest until forming Totum Research.

Since its conception Totum has undertaken studies for a broad range of clients and associations, from General Motors, Canadian Bankers Association, and the Ontario Federation of Agriculture (OFA) to name just a few.

Claude's experience and knowledge has provided guidance and insight to many specialized studies throughout Canada and internationally. Such industries as Medical Media Measurement, Sampling, Modeling and Research Technologies, and the Outdoor Advertising Measurement (COMB) have utilized Claude's experience and knowledge of methodologies to deliver the results.

Present

Our Team

Naireen Lowe

President

Naireen brings 25+ years of experience within the research, marketing and advertising industry, from designer to VP she has worked her way through the marketing advertising disciplines.

Utilizing these well honed skills Naireen moved into providing Competitive Marketing Intelligence for ACNielsen. For 13 years she was responsible for providing research, strategic planning and marketing intelligence to Canada's Fortune 500.

Naireen has also used her knowledge and research skills to assist in the development of media reporting and marketing for such organizations as The Radio Marketing Association, Canadian Newspaper Association, and key companies within these associations.

Present

Our Team

Nula Byles

Creative Director

For twenty years Nula has developed, matured and explored many avenues within the creative industry, from CD package design, to brand development, advertising campaigns to national promotions and events.

Nula has built a reputation as an entrepreneur, with creation of her own successful agency as well as a great contributor within the corporate advertising world as VP Creative Director of BBDO.