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What it means to be meaningful for Betting Brands in Greece

BETTING

11 BRANDS

**1ST TIME ASSESSED FOR
AN MB STUDY IN GREECE**

An exclusive report by Solid
Havas and the Havas Group
based on Greek consumers
of betting products and
services.

ABOUT THE MB STUDY

1st proprietary global
study to connect brands
with human well-being



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THE LAST DECADE BETTING HAS BEEN INCREASINGLY RISING

WHILE TODAY:

71%

of people in Greece state that they are more cautious now about how they spend their money.

73%

of people in Greece state that it is more important than ever to feel a sense of control in their day-to-day life.

THE “ME-CONOMY”
MB REPORT
(CLICK TO READ MORE)



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“In the *Me-economy*, brands need to act decisively to drive social change and progress, but they’re also expected to provide everyday joy, support mental well-being, make life easier, offer affordable indulgences and more”.

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GR BETTING MB RANKING (Clients*)

Meaningful Brands Index (MBI)

50% Performance score

+ 50% Brand Equity score

1
Stoiximan
69.76

2
**pame
STOIXIMA**
66.35

3
**inter
wetten**
66.10

4
bet365
65.72

5
sportingbet
64.88

6
novibet
64.64

7
FONBET
64.24

8
betshop.gr
64.19

9
bwin
64.05

10
Vistabet
62.46

11
betsson
61.44

novibet #3

Jumps at 3rd place in **Performance ranking**
(Scaled average of Functional, Personal and
Collective Benefits)

**inter
wetten** #1

1st place in **Brand Equity ranking**
(Overall purchase intention + advocacy +
overall impression)

*why we chose to analyse "clients" for this report

For reasons related to the specificity of the industry and in order to be accurate about the performance of the brands, we focused only on those consumers who stated that they use betting services and products. Of course, we have the complete survey sample at our disposal.



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MEANINGFUL BRANDS™ TRACKS EQUITY ACROSS THREE SPECIFIC LAYERS

We measure brand performance across

Pillars > Dimensions > Attributes

Company initiatives, behaviors, and actions that respond to and connect at the social and cultural level.

Collective
28%



Rational benefits focused on product functionality, customer service, interactivity, and technology.

Functional
43%



Messaging and behavior that connects on an individual basis and serves a specific personal need or want.

Personal
29%



According to clients, the Betting industry in Greece has the strongest overall delivery on **functional** benefits, scoring **43%**.

The most Meaningful Brands™ are the ones performing well on all three metrics. At their best, they win people's loyalty; they occupy a bigger space in culture; and they also set themselves up for long-term growth.



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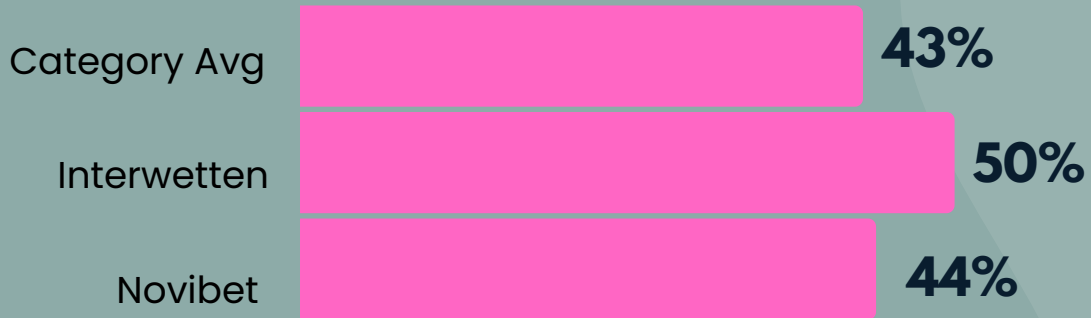
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Comparison

Scoring above Category Avg per pillar

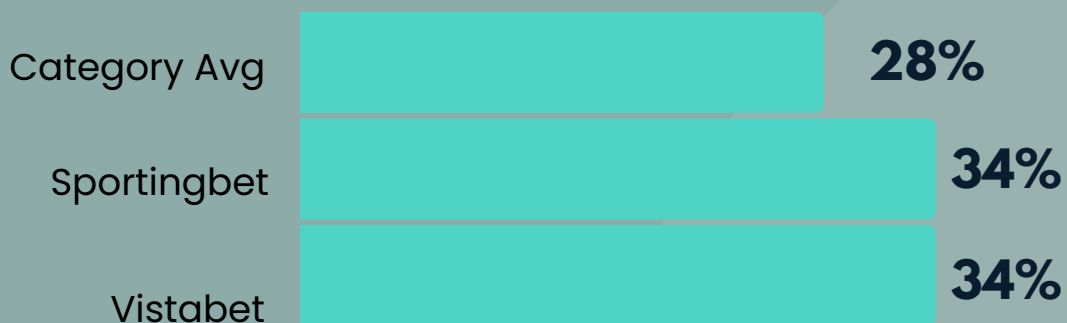
FUNCTIONAL PILLAR



PERSONAL PILLAR



COLLECTIVE PILLAR



Listed across 40+ dimensions and attributes, the study explores how brands can improve people's lives functionally, enhance their personal well-being, and contribute to society more broadly.





Stoiximan

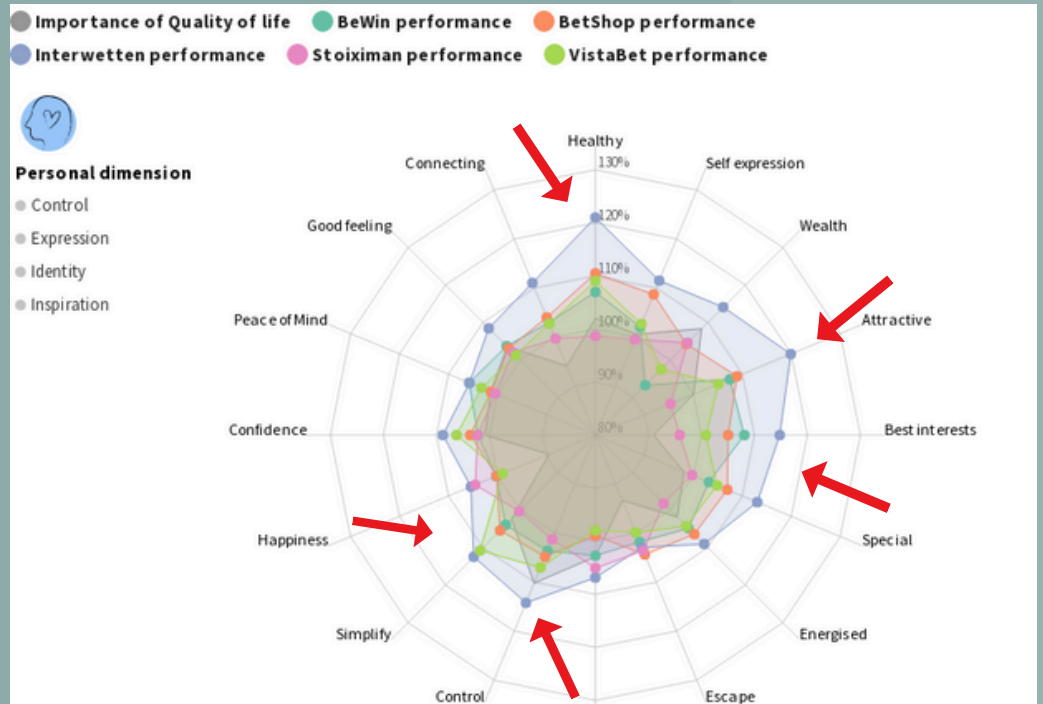
bet365

Stoiximan and **Bet365** overperform in the GR Betting sector on Functional attributes, having almost all of the functional attributes at the **"High Leverage"** quarter. This means high performance for high importance attributes, compared to the rest of the industry. However, a further analysis of performance per pillar highlights which attributes appear in the **"Need to focus"** quadrant. Namely, they score low even though consumers give them high importance.





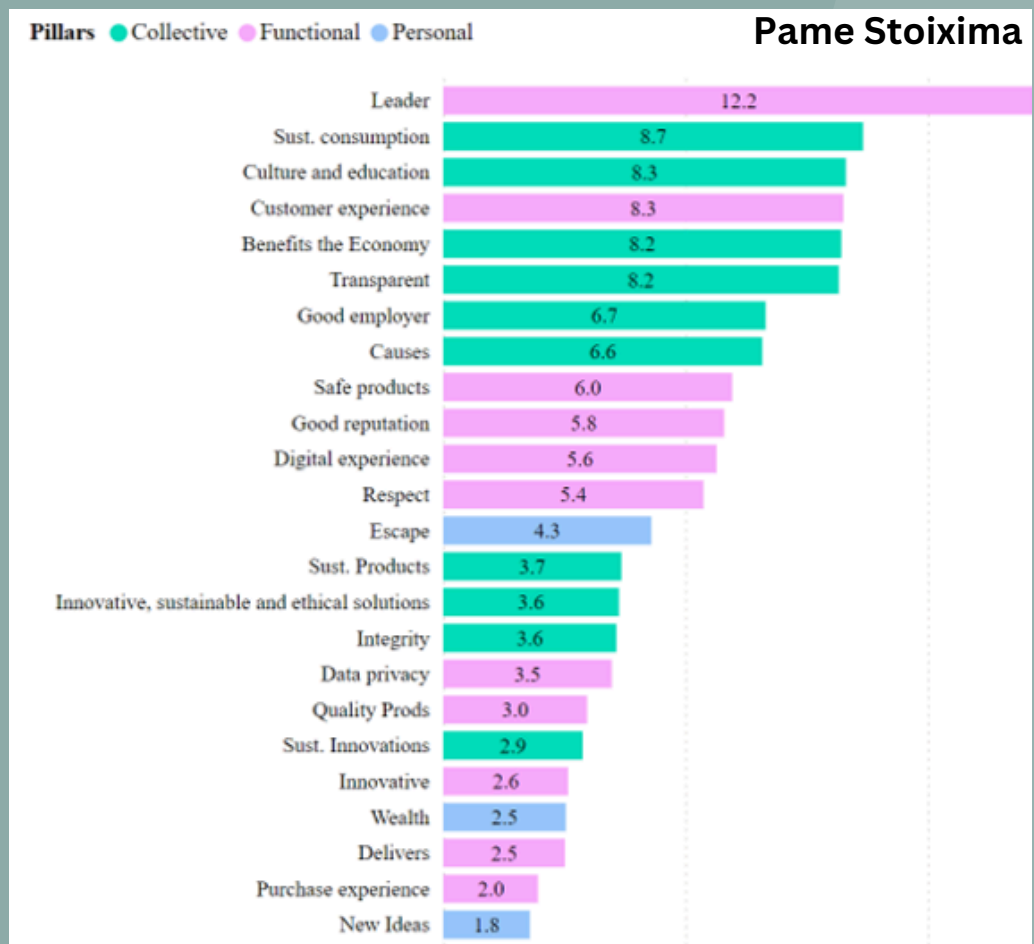
Within the Brand Industry Spider we can see how **Interwetten** is overperforming amongst selected competitors as regards personal benefits, measuring the "Quality of Life" KPI. As mentioned, good performance in personal attributes is vital for today's consumer in the age of the "Me-conomy".



COLLECTIVE PILLAR



As we can see in the Comparison Tool, **Pame Stoixima** scores above average in several attributes in the Greek Betting category (all 3 pillars).



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#1 Top Driver for Greek Betting Clients

QUALITY PRODUCTS



Offers good quality
products/ services.

Collective Best Performance

HIGH PERFORMANCE - HIGH IMPORTANCE



TRASPARENT

Is transparent and honest
in its activities and communications.

Personal Benefits to focus on

LOW PERFORMANCE - HIGH IMPORTANCE



NEW IDEAS

Inspires me with new
ideas and possibilities.



GOOD FEELING

Helps me feel good
about myself.

GREAT EXPECTATIONS

Opportunities for further
brands' performance
improvement .

ESCAPE



Lets me escape
from the everyday.

GOOD EMPLOYER



Is considered to be a
good place to work.

Interestingly, the personal and collective
dimensions hold a lot of value yet to be unlocked.



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Functional Benefits play a larger role in the performance of Betting brands in Greece. Personal and Collective benefits follow by playing a significant role, as they act drastically on the meaningfulness of each brand. This is achieved either through the "**Quality of Life**" KPI (which seems to be the defining benchmark for the modern consumer), or through the imprint left by brands responding to contemporary concerns and imperative collective priorities of society.



Functional Pillar

Greek customers feel that Betting companies treat them with respect. More effort is needed though: (a) in the range of products and services to better suit customer needs; (b) in offering good value for money; and (c) in cultivating the feeling that brands are acting as industry leaders, which is something that consumers want. Beyond good performance, there are even more expectations and opportunities concerning range and good service quality.



Personal Pillar

The first personal priority for users of Betting services seems to be based on the dimension of Inspiration and specifically on **whether the betting experience helps them escape their everyday routine.** This is most likely why there is a need for further effort on the part of brands to create new ideas and possibilities, so as to make the involved consumers feel even better. Overall though, feeling happy and escaping daily routine seem to be the desired goals with plenty of room for further improvement.



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REPORT'S KEY POINTS



Collective Pillar

In Greece, the collective benefits take up more than 1/4 in the evaluation of the brands' performance within this category.

The Ethical dimension seems to have more importance with customers focusing on whether a brand is transparent and honest in its activities and communications.

Further efforts are needed in the field of ecology, as Sustainable Innovations (i.e. whether each brand is committed to making products/services more sustainable) seems to be lagging behind. However, in addition to transparency (which, as we have seen consumers are concerned about), there seems to be great room for improvement in **order for a betting company to function as a good employer.**

Conclusion

The report's findings demonstrate that, while brands' actions to drive societal progress, inclusion and sustainable behavior have become more important and anticipated, in the face of more challenging and uncertain times, people are examining everything through the lens of "me". Today, brands need to act decisively in order to drive social change and progress. However, they are also expected to daily provide joy, to support mental well-being, to make life easier, to offer affordable indulgences and more.

In conclusion, Betting brands in Greece have an opportunity to improve the brand experience by emphasizing and connecting how their functional elements help customers achieve their personal goals.

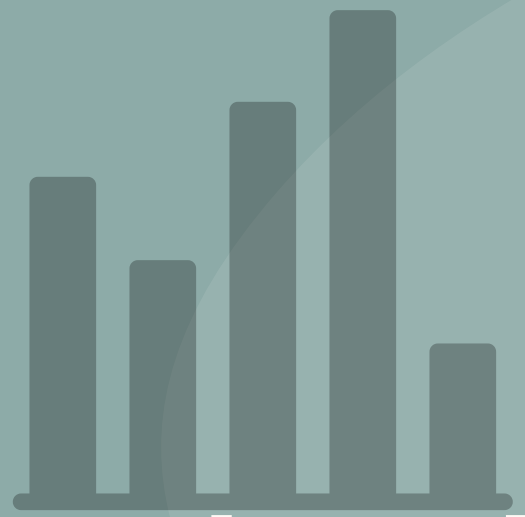


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More analysis per brand upon request

Meaningful Brands' analysis includes a whole series of graphs that are customized according to your needs, based on KPIs, comparison with specific competing brands and audience segmentation (gender, age, income, client / non-client).

LEARN MORE ABOUT MEANINGFUL BRANDS IN GREECE

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