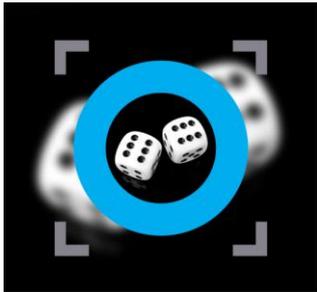




Canadian Gambling Habits and Intentions: Traditional and Online Offerings



pollara
strategic insights

April 2019

Methodology

From **March 29 to April 13, 2019**, Pollara conducted an online survey among a randomly-selected, reliable sample of **N=1,253** adult Canadians. A margin of error cannot be applied to online samples. However, a probability sample of this size would carry a margin of error of $\pm 3.0\%$, 19 times out of 20. The sample was statistically weighted using standard weighting techniques to ensure the results accurately reflect the gender, age, and geographic distribution of the adult Canadian population according to the most recent Census.

The objectives of the study were to determine:

- Participation in 19 different gaming activities during the past year
- Intent to play lotteries and casino games on government and privately run gaming websites
- Demographic and regional segments most attracted to each gaming activity

The unweighted sample is distributed as follows:

AGE	BC	Western	Ontario	Quebec	Atlantic	Canada
18-39 years	43	111	106	127	31	418
40-59 years	35	101	95	132	20	383
60+ years	72	130	98	105	47	452
Total	150	342	299	364	98	1,253

Key Findings 1 of 3

PAST BEHAVIOUR

- Playing traditional lottery games purchased at retail locations is still the number one gaming activity that Canadians enjoy. More than half (55%) played at least once every 2 months in the past year. Playing lotteries increases for each age group from a low of 35% among the 18-29 year olds to a high of 64% for those age 60 year and above.
- Playing lottery games online through a government run website (12%) is still in its infancy as is other forms of online gambling through both government (10%) and privately run operations (9%). Those in the 30-39 year old age group are more likely to have played lotteries online (22%) or gambled online through both government (17%) and private operations (18%).
- For the younger age group (18-29 years), multiplayer games online is most frequently played activity (once or more in the past 2 months). Younger Canadians are also more likely to have played Fortnite (18%) or Minecraft (20%) games in the past year as well.

Key Findings 2 of 3

FUTURE INTENTIONS

- While one-quarter (24%) of Canadians and almost one-third (32%) of Atlantic Canadians indicate they are likely to purchase lottery tickets online in the next 12 months, the vast majority are not ready to make drastic changes to their playing patterns. Just under ten percent (9%) of Canadians indicate they are very likely to purchase a lottery ticket online in the next 12 months.
- Likelihood to gamble online through a provincially run website (16%) or a privately run website (14%) is slightly lower. Intended uptake to gamble on a provincially run website is higher in BC (18%) and Ontario (19%) where provincial online gaming offerings are well established.
- Interest in gambling and purchasing lottery tickets through a mobile device indicates that more games built for this platform may help an increase in player participation.
- Interest in buying lottery tickets and gambling online and with mobile devices peaks with the 30-39 age group (28%-35% range) and drops off gradually with older age groups. These ideas are also not as entrenched as deeply with the 18-29 year olds who seem more interested in other non-conventional types of social gaming activities.

Key Findings ^{3 of 3}

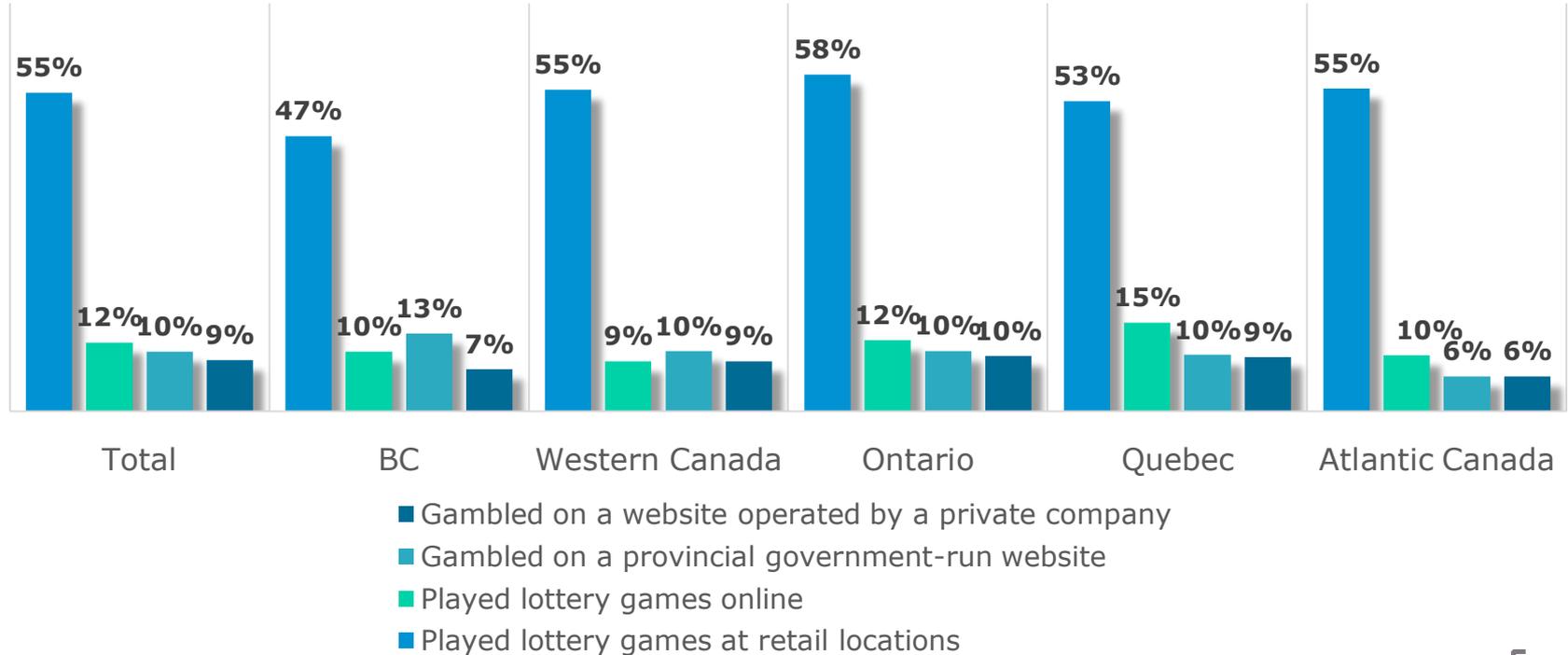
STRATEGIC IMPLICATIONS

- Traditional gaming products and delivery methods are less attractive to younger age cohorts (under 30 years of age) while current game offerings made available online are most attractive to the 30-39 year old age group and then drop off progressively through the older age groups.
- Younger gamers are more likely to play online multiplayer games, Fortnite, and Minecraft as well as other online social games. However, they also participate to some degree in traditional games both online and offline, just not a rate that will sustain current gaming revenues.
- Gaming operators and government lottery enterprises will need to develop new, attractive, social skill-based games if they are to win over younger customers to the degree that the current game offering attract entrenched older players.

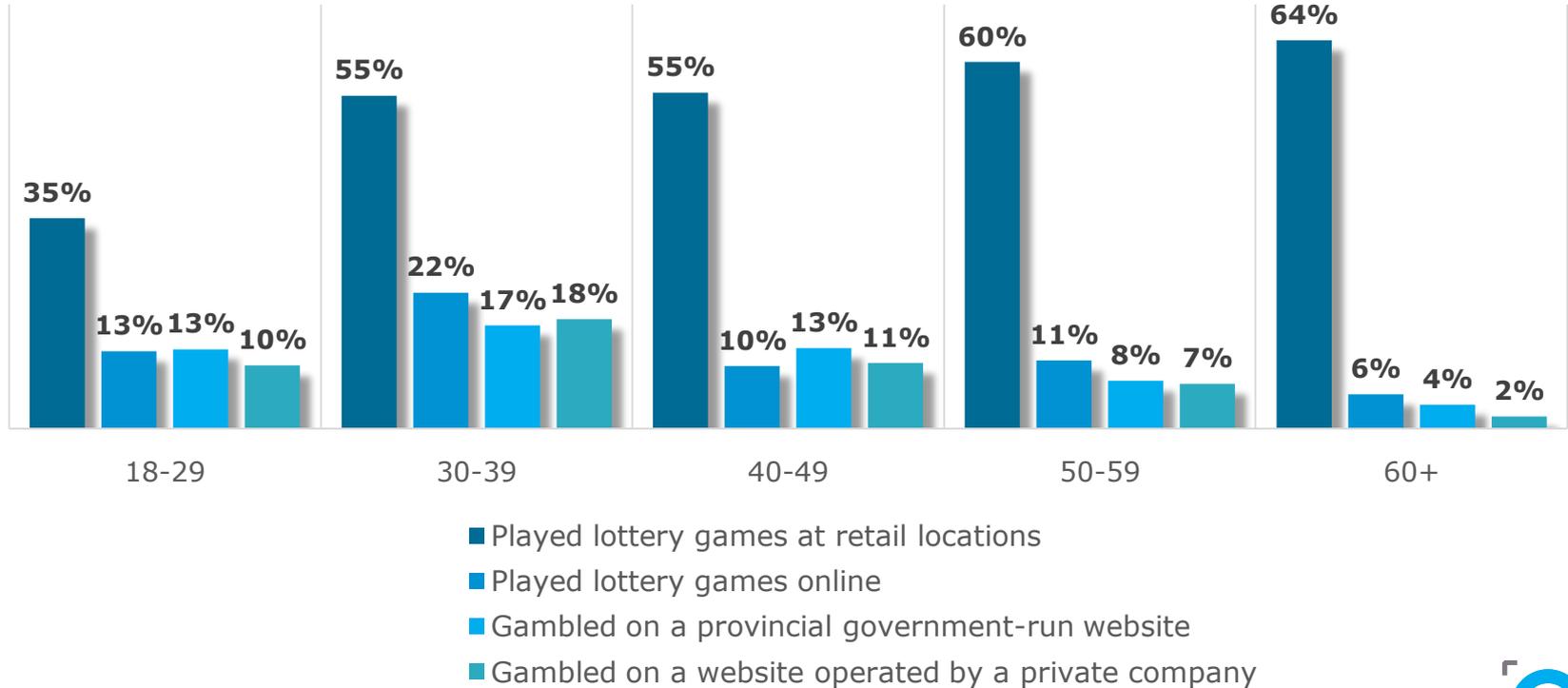


Detailed Findings:
Past Behaviour
(At least once every 2 months in the past year)

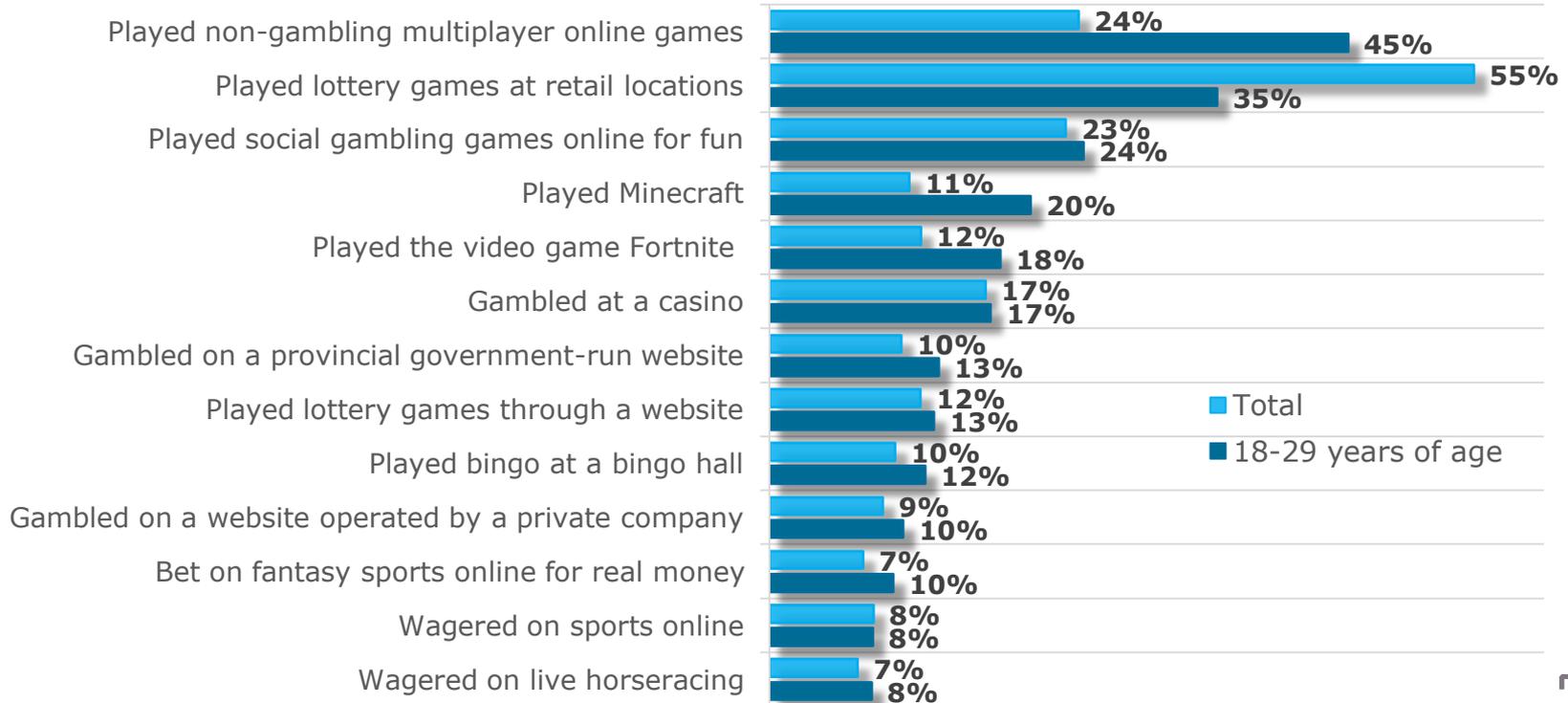
Online Gambling and Lotteries: Regional Differences



Online Gambling and Lotteries: Age Differences



Traditional and Non-traditional Gaming: 18-29 year olds and total population

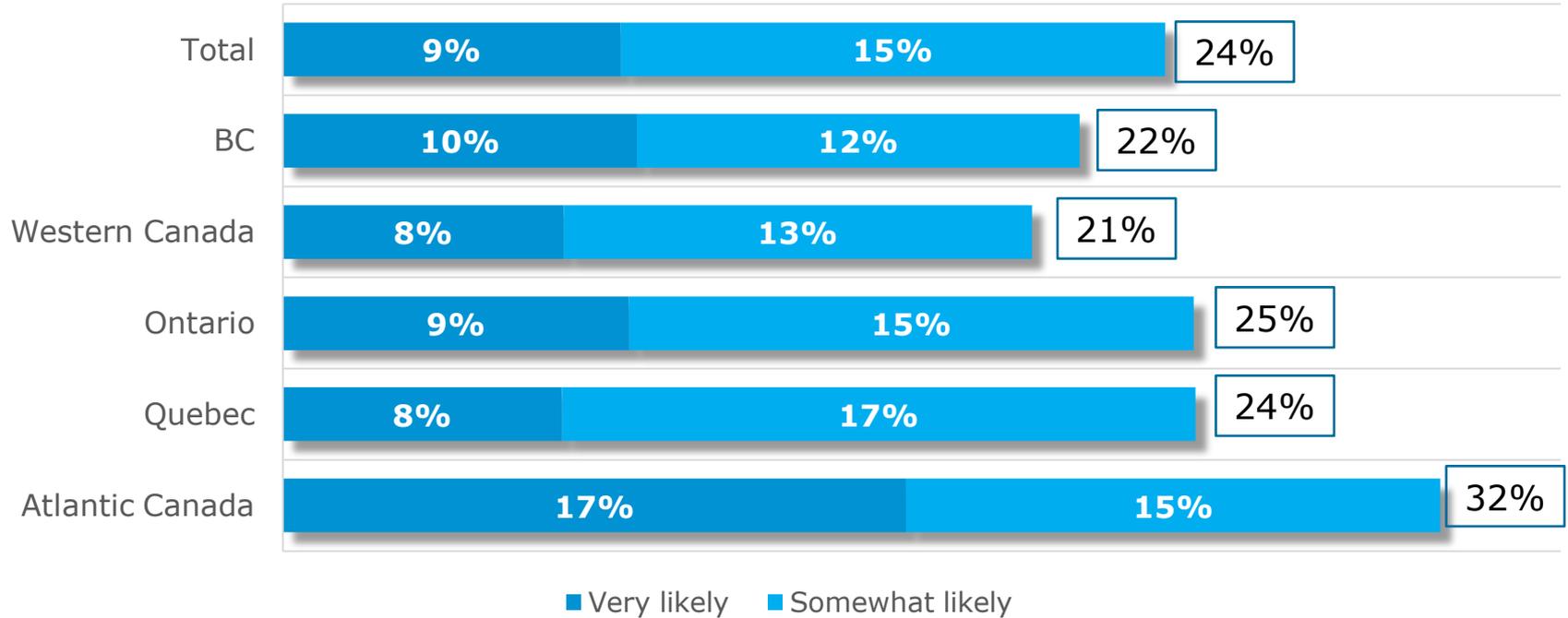




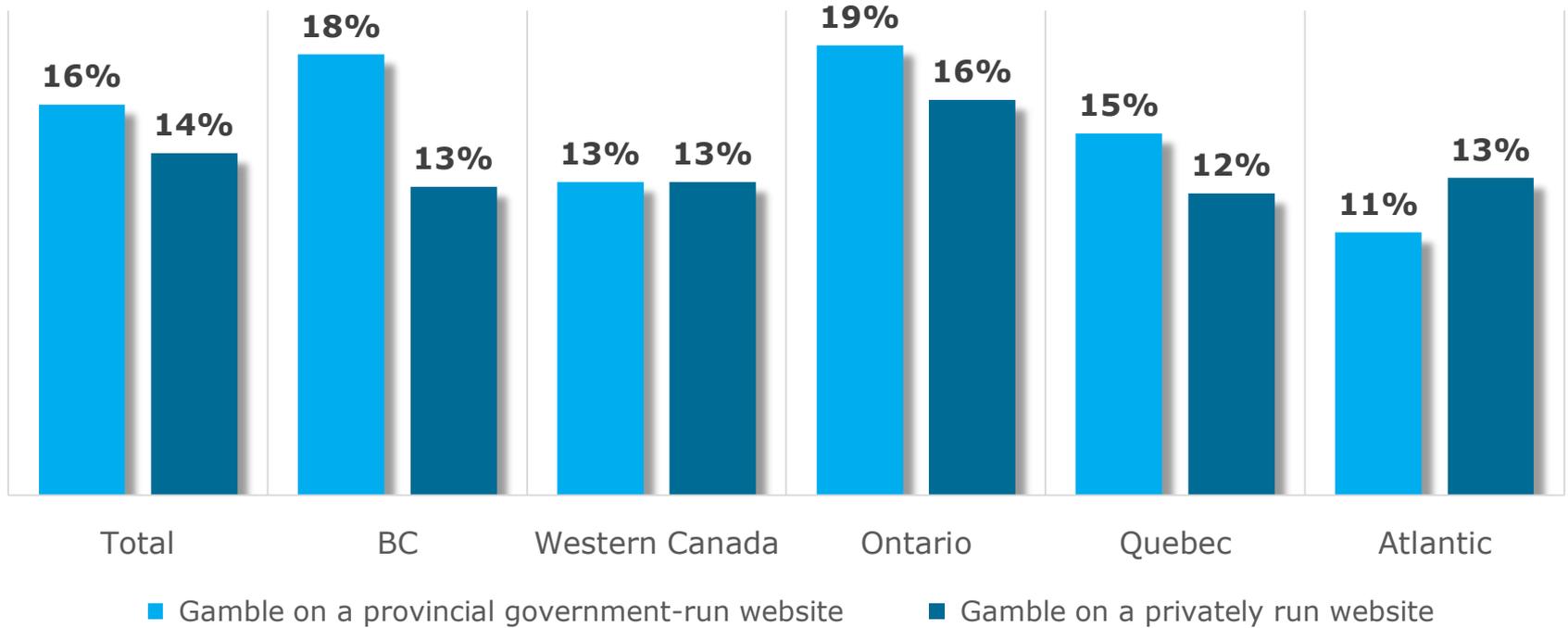
Detailed Findings:
Future Intentions
(Next 12 Months)

pollara
strategic insights

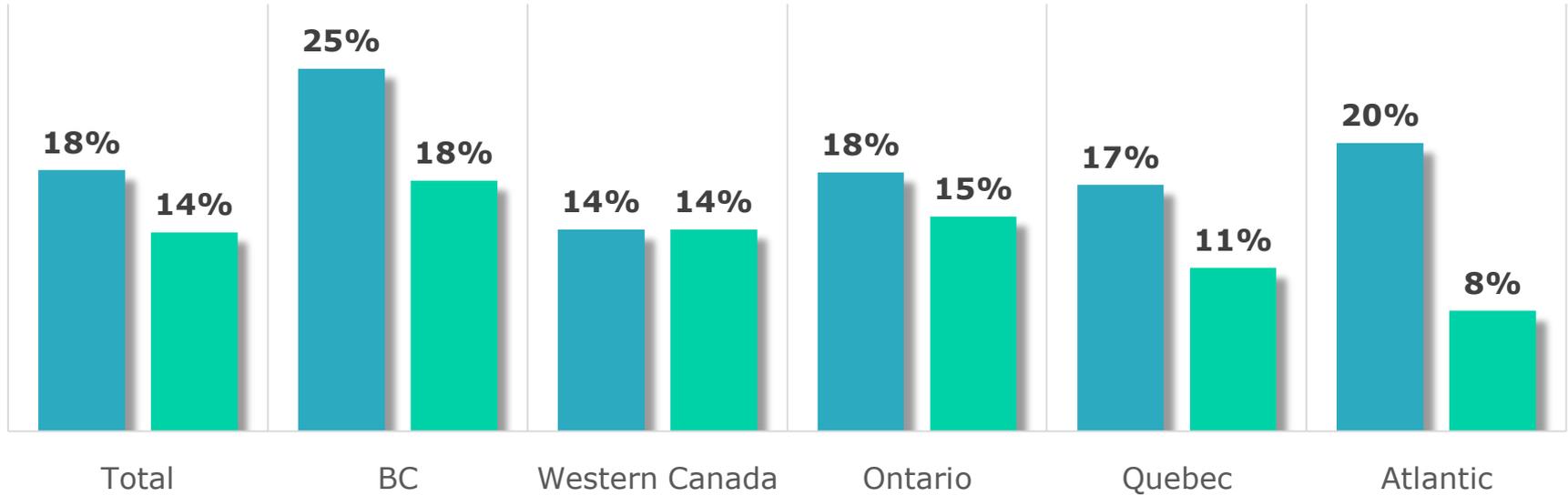
Lottery tickets on a provincial government-run website



Gamble on a provincial or private run website



Lottery or Gamble online using a mobile phone



■ Buy lottery tickets online using a mobile device ■ Gamble for real money online using a mobile device

Lottery and gambling online: Age differences

	18-29	30-39	40-49	50-59	60+	Total
Buy lottery tickets on a provincial government-run website	20%	35%	31%	26%	15%	24%
Gamble on a provincial government-run website	15%	32%	18%	14%	7%	16%
Gamble on a website operated by a private company	17%	28%	17%	10%	5%	14%
Buy lottery tickets using a mobile device such as a smartphone	19%	35%	22%	19%	6%	18%
Gamble using a mobile device such as a smartphone	16%	29%	19%	11%	3%	14%



**For questions
or inquiries about our gaming research products,
please contact:**

Richard Leigh-Bennett
Vice President
richardleigh-bennett@pollara.com
(613) 793-7753

pollara
strategic insights
www.pollara.com