iGaming in Canada

Measuring, Tracking, and Understanding the Online Gambling Market

Traditional lottery and gaming offerings are in decline. With an ever-increasing array of gaming entertainment options available online, more and more Canadians are turning to the internet to gamble – both legally and illegally.

Yet, little substantive research is being conducted to understand this new market trend.

That is why we have launched iGaming in Canada - the country's definitive study of online gaming. Our study will measure and track the size of the current and potential online gaming market, provide online player segment profiles, and identify online player preferences, demands, and areas of growth.

Areas of Investigation

Over the course of 2 waves of research per year, the study will measure and track a range of attitudes and behaviours, including:

- Public approval/disapproval for various online gambling legalization options, including reasons behind these attitudes.
- Among current and potential online gaming customers, we will measure participation in a comprehensive range of traditional, online, and new or possibly emergent online gambling opportunities:
  - Traditional gaming activities such as lottery games, casino visits, bingo, and racetracks.
  - Online gaming activities such as government and privately run gambling websites, online sports betting, and multiplayer online games.
  - New or possibly emergent online gambling opportunities, such as single game sports betting, fantasy sports, eSports, and social gambling.
- Awareness and reputation of government and non-government gaming and betting sites/brands.
- Measure the types of gaming activities, frequency of wagering across all types, government and non-regulated sites visited, and impressions and preferences for these sites.
- Among potential online gaming customers, we will measure the types of gaming activities and sites/platforms they are likely to engage in.
- Market size of the online gaming markets, with a focus upon identifying current and potential players across a comprehensive range of gaming activities.
- Demographic, geographic, and attitudinal-behavioural profiles of current and potential online players.
- Strengths, weaknesses of current available offerings online for both government and non-regulated sites.
- Preferences and interests in other forms of non-traditional online gaming.

Timelines

Wave 1	
Survey Fielding & Data Analysis	July-August
Report Delivered	September
Wave 2	
Survey Fielding & Data Analysis	October-November
Report Delivered	December

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Methodology

The study includes a telephone survey among N=1,000 adult Canadians in order to identify the current incidence and potential future uptake of online gaming behaviours. This survey will allow us to accurately calculate the size of the online gaming market, and profile the current and potential players.This survey will also gauge and track approval/disapproval for various online gambling legalization options amongst the general public, and reasons behind these attitudes.

The core component of this study is an online survey– conducted twice per year – among N=1,200 randomly-selected, reliable samples of current and potential online gaming customers. For each wave of the survey, we will interview n=800 current online players who have gambled for money in the past 12 months and n=400 potential online players who have gambled for money in the past 3 years or express an interest in gambling online for money within the next 2 years.

The demographic and geographic characteristics of current and potential online players collected in the telephone survey will be used to statistically weight the online samples, to ensure they properly align with the actual characteristics of these population segments.

Regional Quota Regime	Online Player
Canada (Total Sample)	**1,200**
Atlantic Provinces	100
Quebec	200
Ontario	300
Manitoba	100
Saskatchewan	100
Alberta	200
British Columbia	200

Deliverables

For each wave of the study, we will provide a:

- PowerPoint-based report of survey findings, including key findings, recommendations, and analysis of results among total base and key regional and demographic segments
- Complimentary in-person presentation

Pricing

In addition to the annual subscription, subscribers can **purchase proprietary omnibus questions**. Pollara will design custom questions in consultation with subscribers. Your proprietary omnibus questions and results will only be shared with you.

Subscribers can also **purchase** increased (booster) samples. Pricing for **provincial booster samples** is specified herein – with the price per n=100 covering both waves of research in 2019. Pricing for **booster samples among specific demographic, attitudinal, or user segments** will be determined based upon the incidence of the target segment.

Annual Subscriptions (2 Waves)	$25,000
Custom Closed-Ended Questions Custom Open-Ended Questions	$800 each $1,200 each
Booster samples, across 2 waves	$1,500 per n=100

Richard Leigh-Bennett
Vice President
613.793.7753
Richardleigh-bennett@pollara.com
www.pollara.com

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