



## Internet Gaming in Canada Public Perception and Behaviour



April 2010

Nobody's Unpredictable

## Background

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- ◆ Is Internet gambling legal in Canada?
- ◆ Gambling operates exclusively under the control of the provincial and territorial governments.
- ◆ Any province that does offer Internet gambling cannot take bets from out of province residents unless that other province allowed it. Currently two Canadian jurisdictions offer lottery games for sale on the Internet to resident members.
- ◆ Regulating any product that is offered on the Internet is a very difficult task.

## Methodology

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- ◆ The survey was conducted on the Internet between March 10<sup>th</sup>, 2010 and March 22<sup>nd</sup>, 2010 using the Ipsos iSay panel.
- ◆ A total of 1724 interviews were conducted.
  - This includes n=1355 respondents representative of the adult general population in Canada.
  - An additional n=369 interviews were conducted with Internet Gamers.
    - Internet Gamers are defined as those who have ever played an Internet game for money
- ◆ The survey included questions on the following topics:
  - Understanding and perceptions of Internet gaming regulation;
  - 'For money' Internet gaming behaviours;
  - 'For fun' Internet gaming behaviours;
  - Traditional gaming behaviours; and
  - Demographics.
- ◆ Data for the general population was weighted for age, gender, and region, while the Internet Gamer data was not weighted.



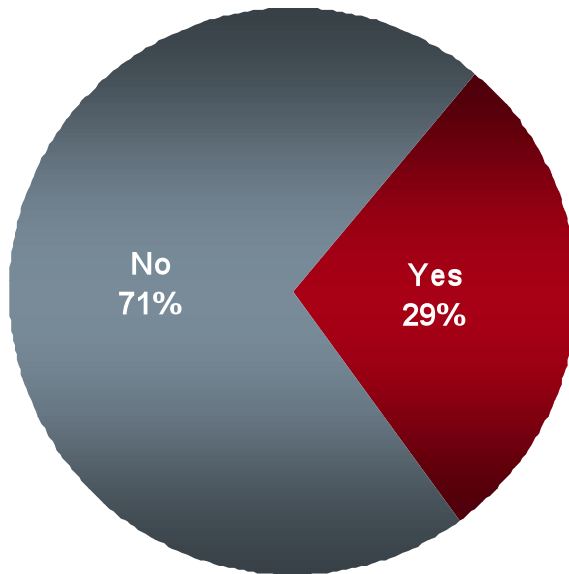
## Perceptions of Internet Gaming



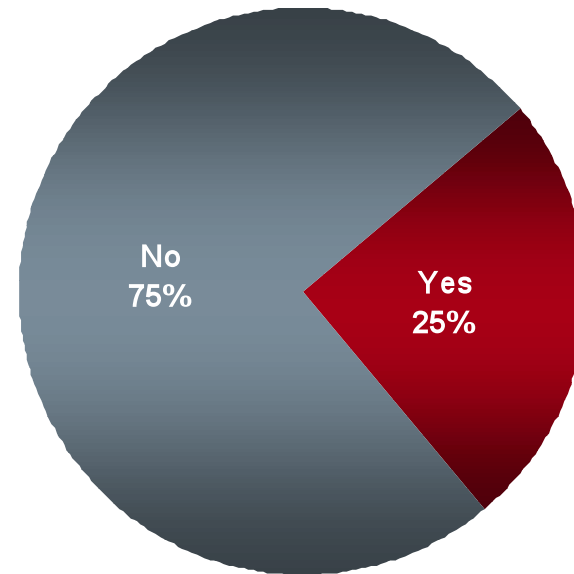
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# Perception of Legality of Internet Gaming in Canada

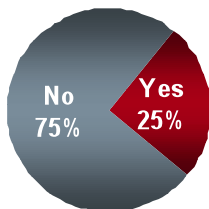
General Population (n=1355)



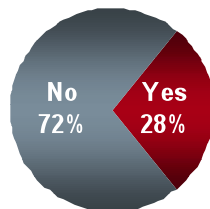
Internet Gamers (n=523)



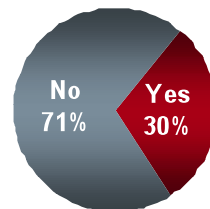
BC (n=178)



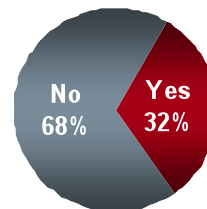
West (n=227)



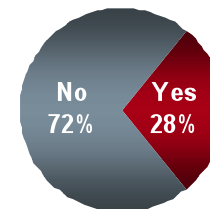
Ontario (n=519)



Quebec (n=330)

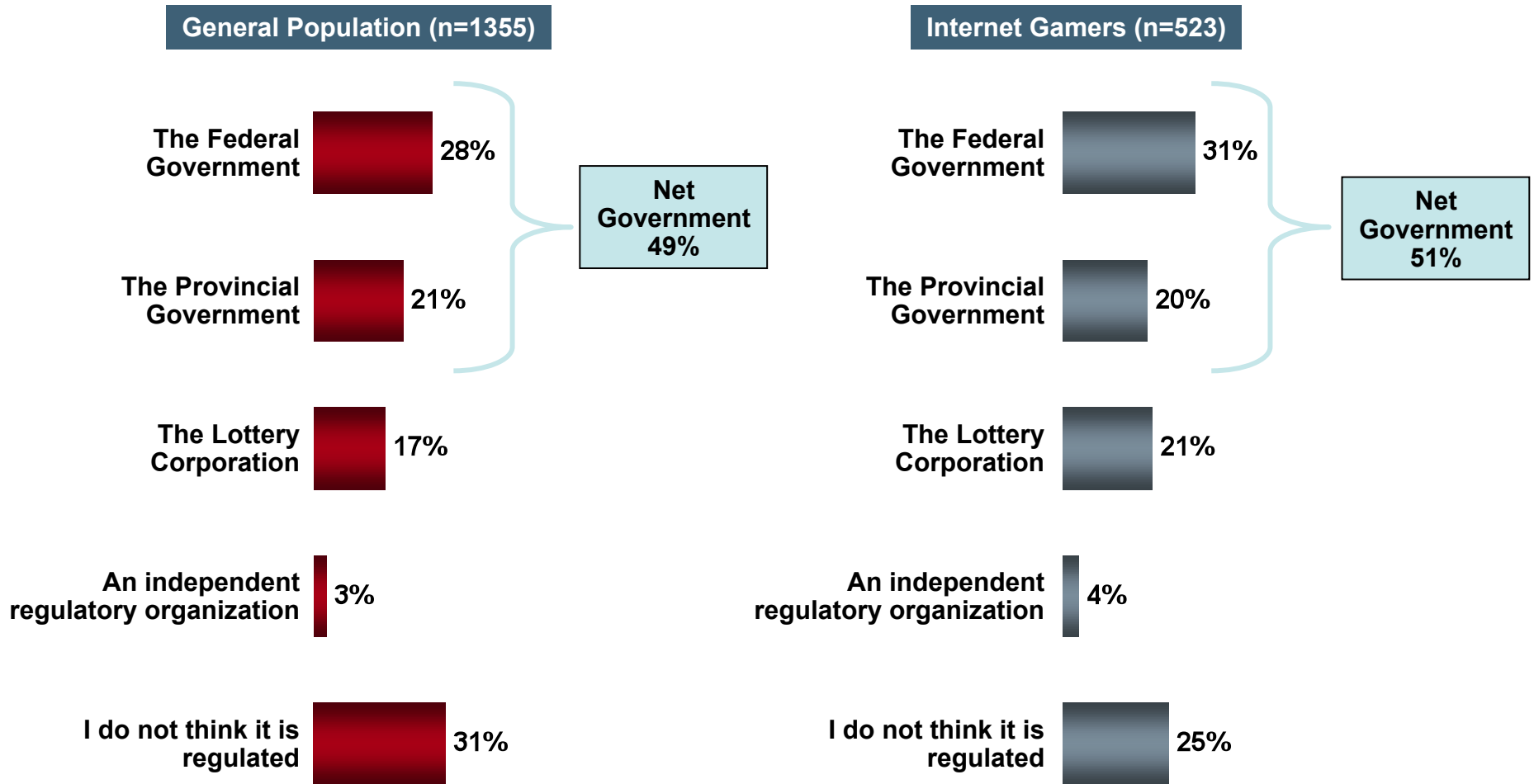


Maritimes (n=101)



G1. To the best of your knowledge, is gambling, or wagering money over the Internet (not including Lottery purchases, if allowed in your Province) considered illegal in Canada?

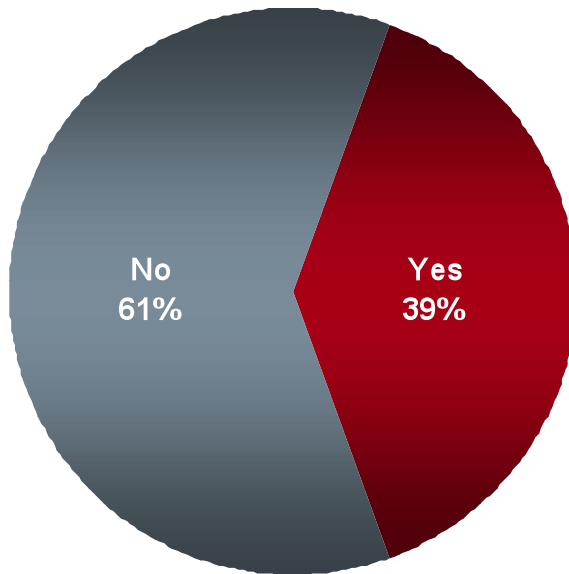
# Perception of Regulation of Internet Gaming



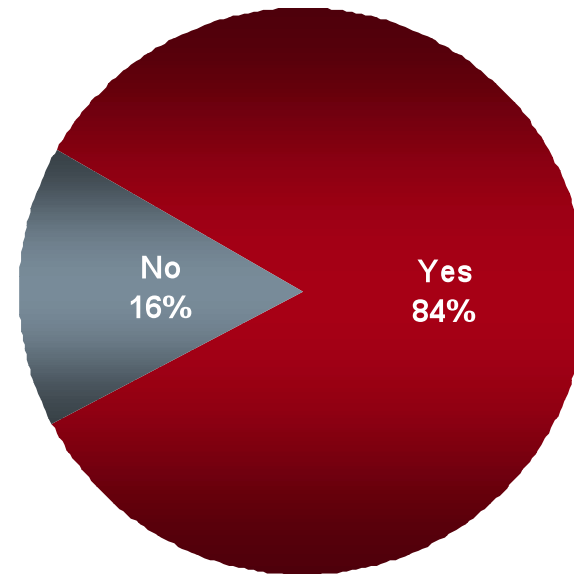
G2. Who do you think regulates Internet Gambling in Canada?

# Acceptance of Internet Gaming

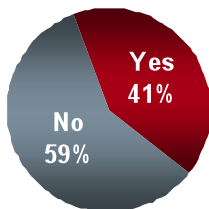
General Population (n=1355)



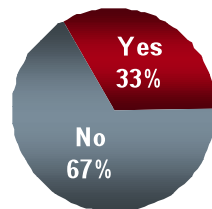
Internet Gamers (n=523)



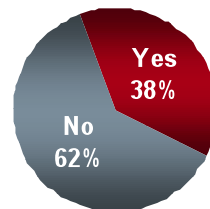
BC (n=178)



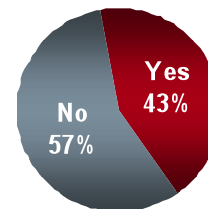
West (n=227)



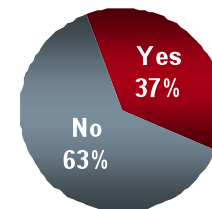
Ontario (n=519)



Quebec (n=330)



Maritimes (n=101)



G2A. Do you personally feel that gaming on the Internet for real money is an acceptable form of entertainment?



# Opinion of Internet Gaming

**General Population (n=1355)**

**Internet Gamers (n=523)**

Internet gambling  
should be banned  
altogether



38%

Internet gambling  
should be banned  
altogether



9%

Internet gambling  
should be permitted as  
long as it's regulated by  
the government



50%

Internet gambling  
should be permitted as  
long as it's regulated by  
the government



65%

Internet gambling  
should be permitted  
without government  
regulation



12%

Internet gambling  
should be permitted  
without government  
regulation

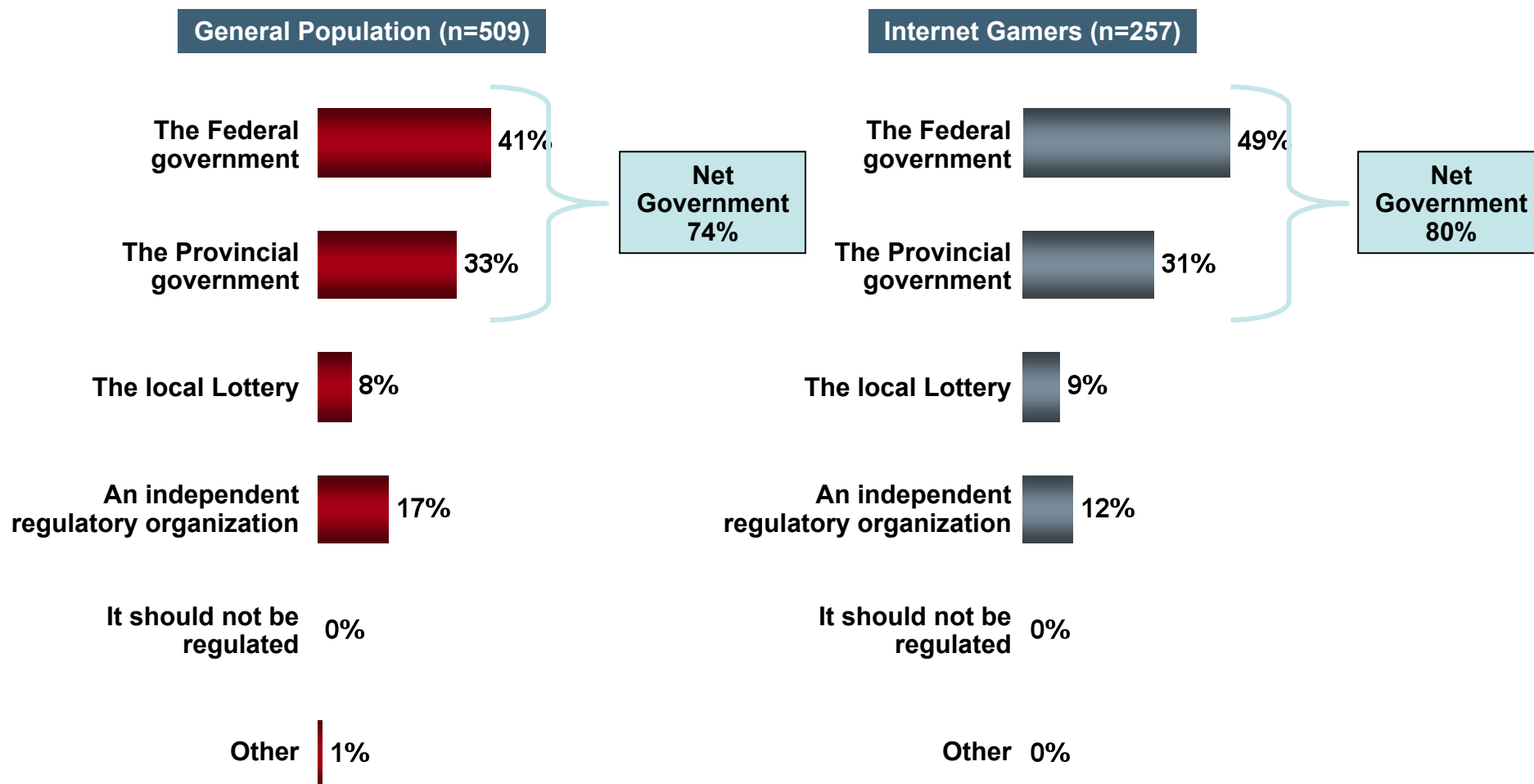


26%

G3. Which of these statements about Internet gambling is closest to your own opinion?

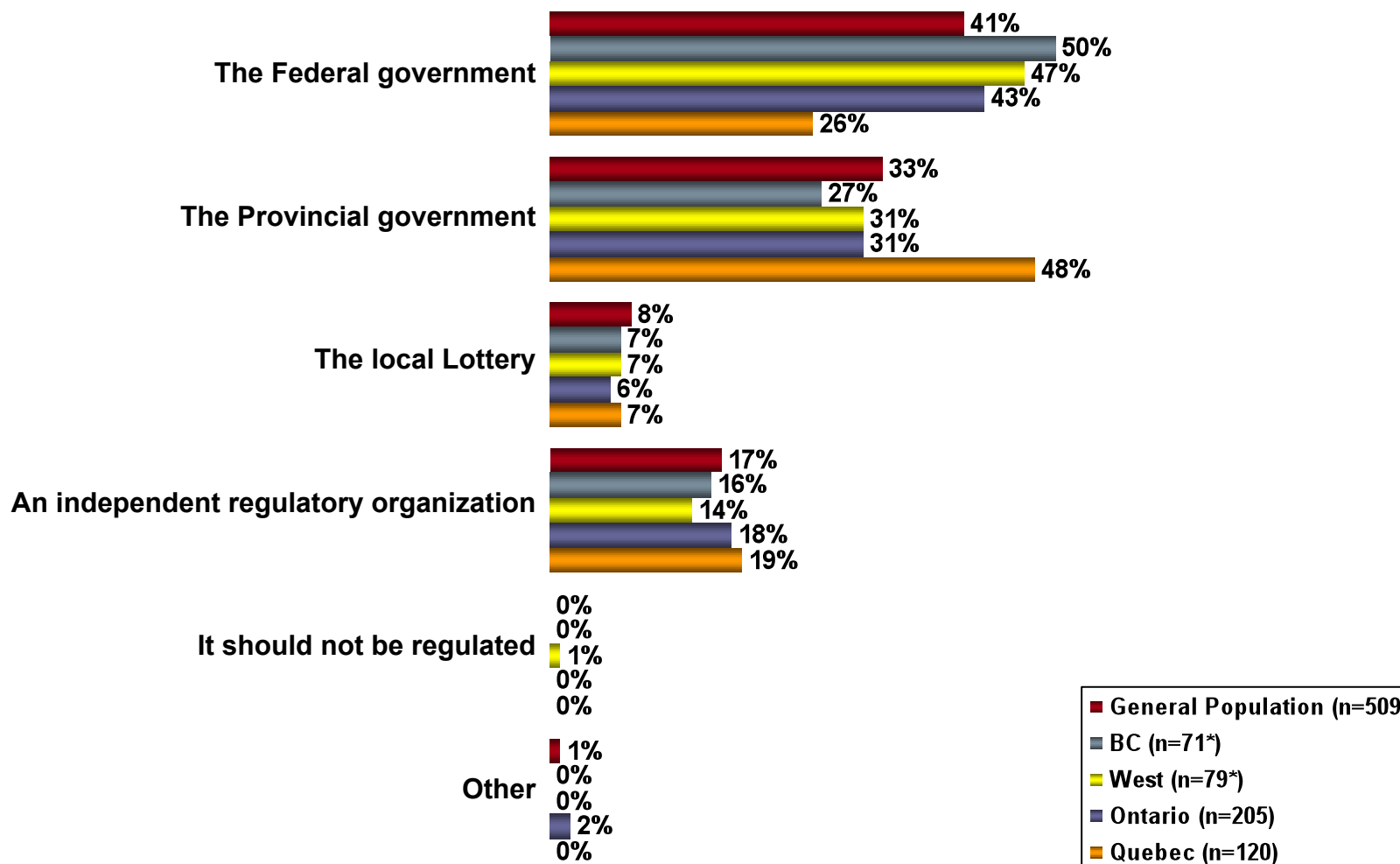


# Who Should Be Responsible for Internet Gaming Regulation



G4. Who do you think should be responsible for regulating Internet gambling?

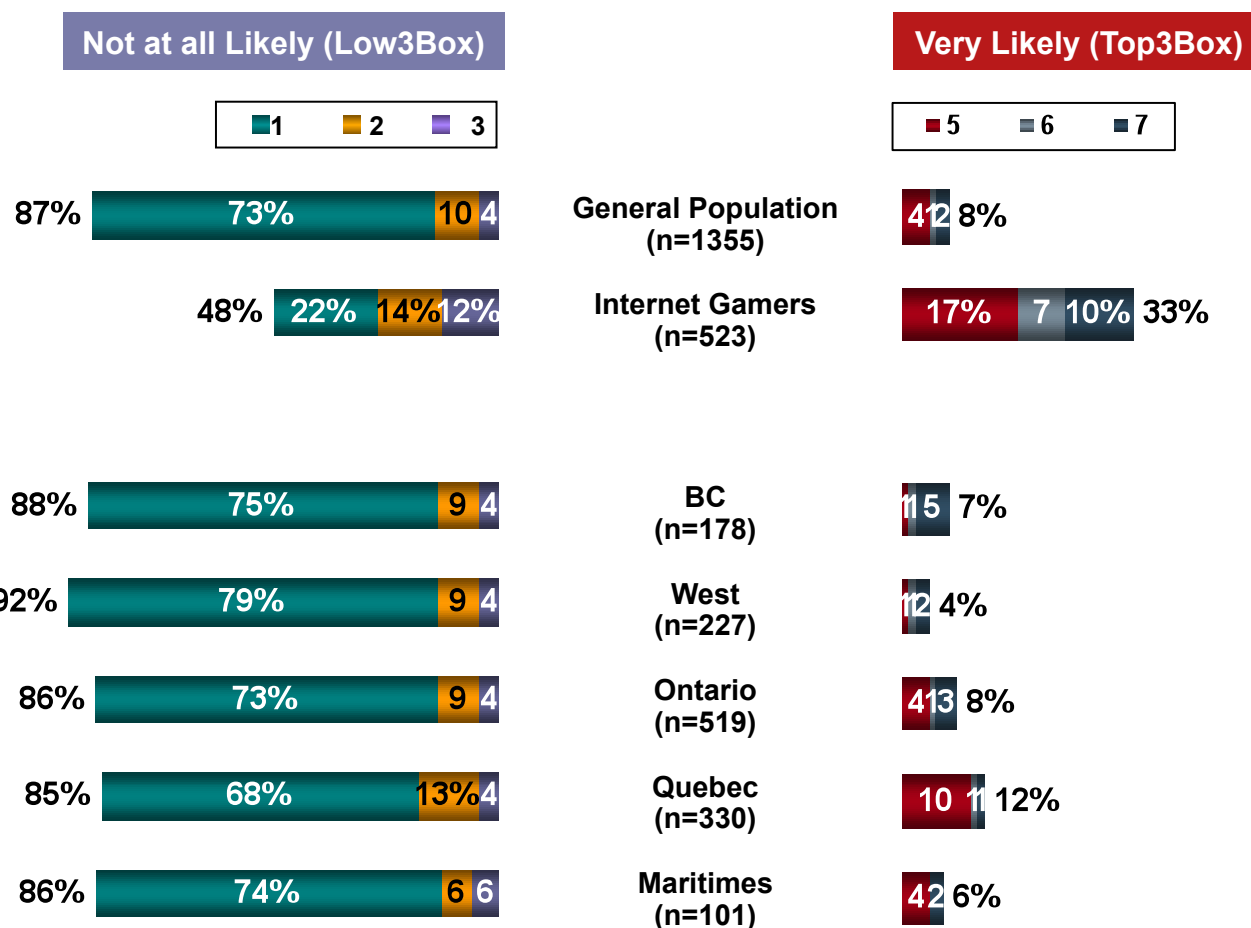
# Who Should Be Responsible for Internet Gaming Regulation



G4. Who do you think should be responsible for regulating Internet gambling?

\*Caution: Small base size  
 \*\*Note: Maritimes not reported due to small base size

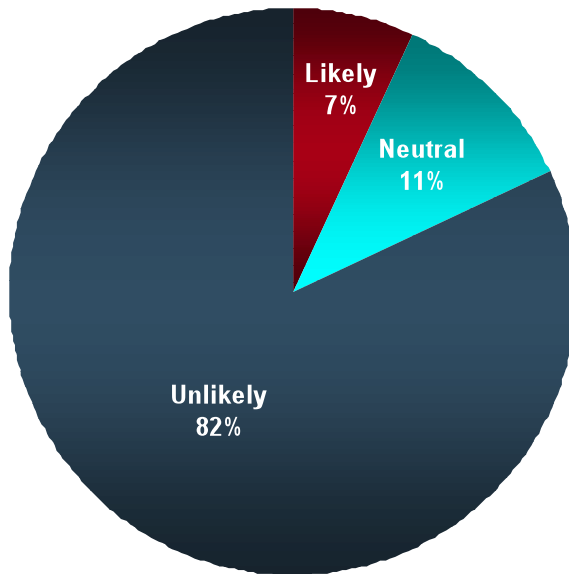
# Likelihood of Internet Gaming with Lottery



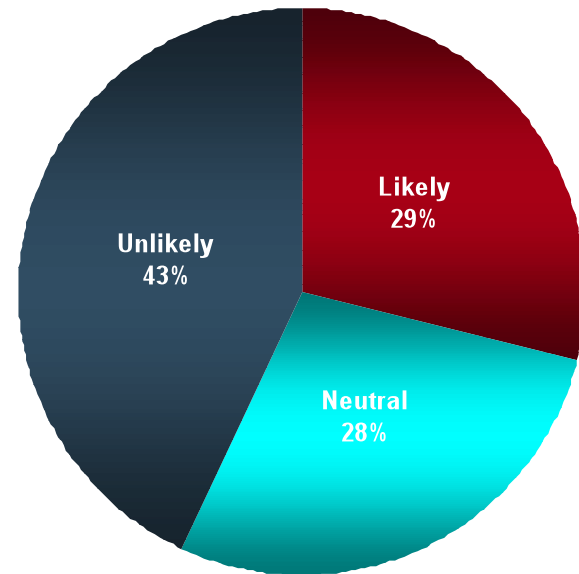
G4a. How likely would you be to start gaming with your local Lottery if they were to offer Internet gaming (Internet casinos, poker and sports better) for real money?

# Likelihood of Playing Casino Games on the Internet

General Population (n=954)

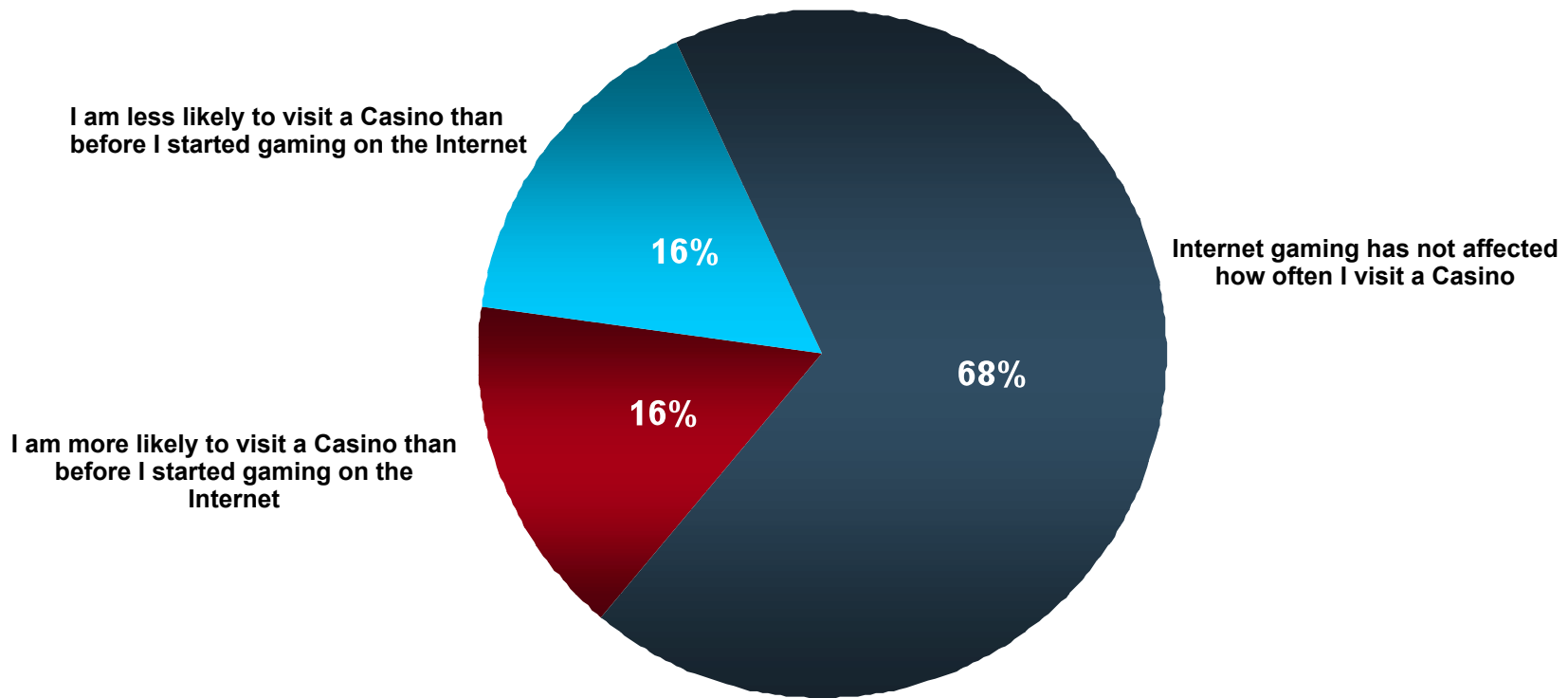


Internet Gamers (n=474)



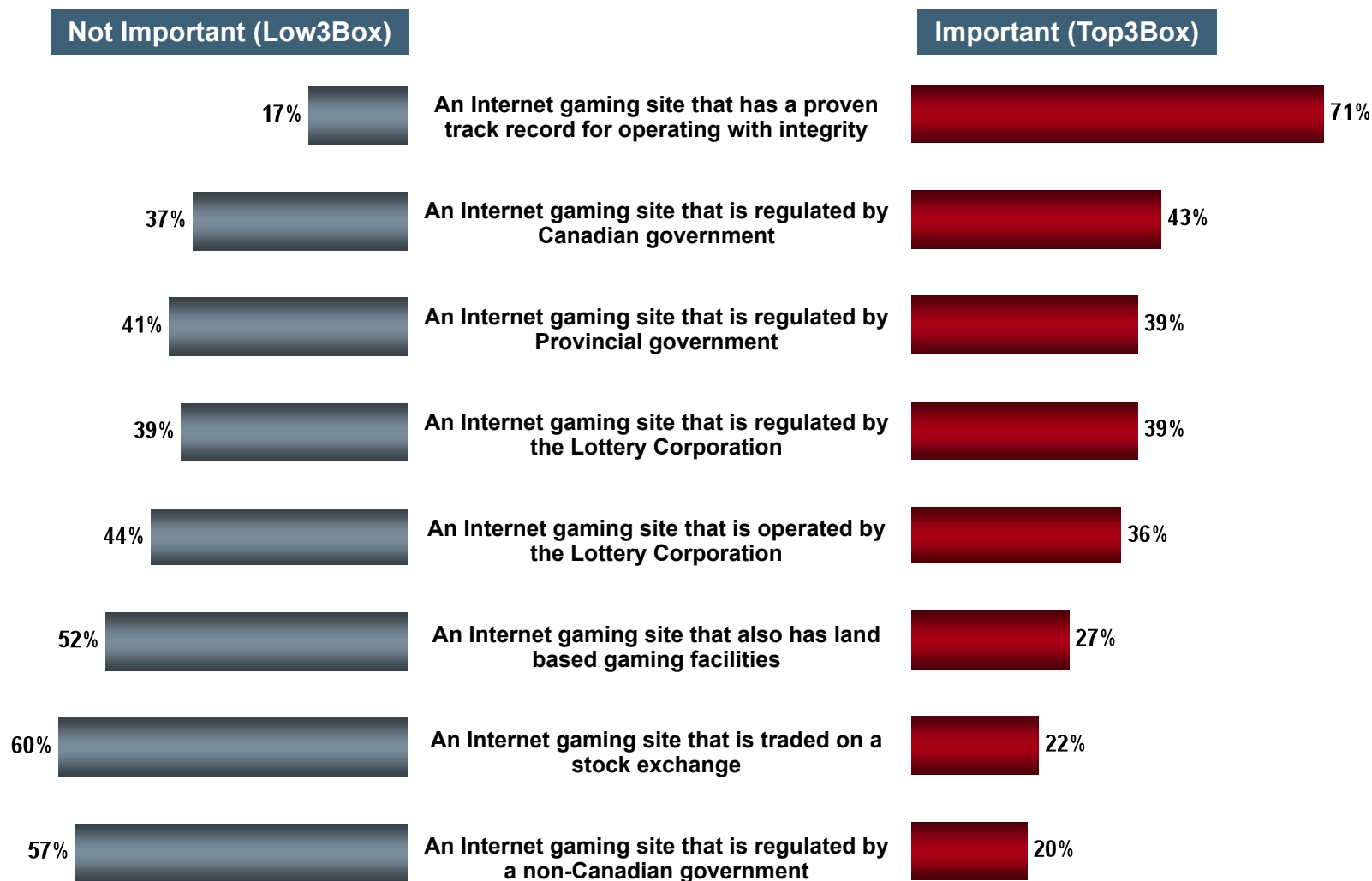
G8a. If your favorite Casino were to offer Casino style gaming (slot machines, roulette, Blackjack, Poker, Craps, etc.) for real money on the Internet, how likely would you be to play?

## Impact of Internet Gaming on Casino Visitation



G8. Which of the following statements best describes how your Internet gaming experiences have affected your visitation to land based Casinos?

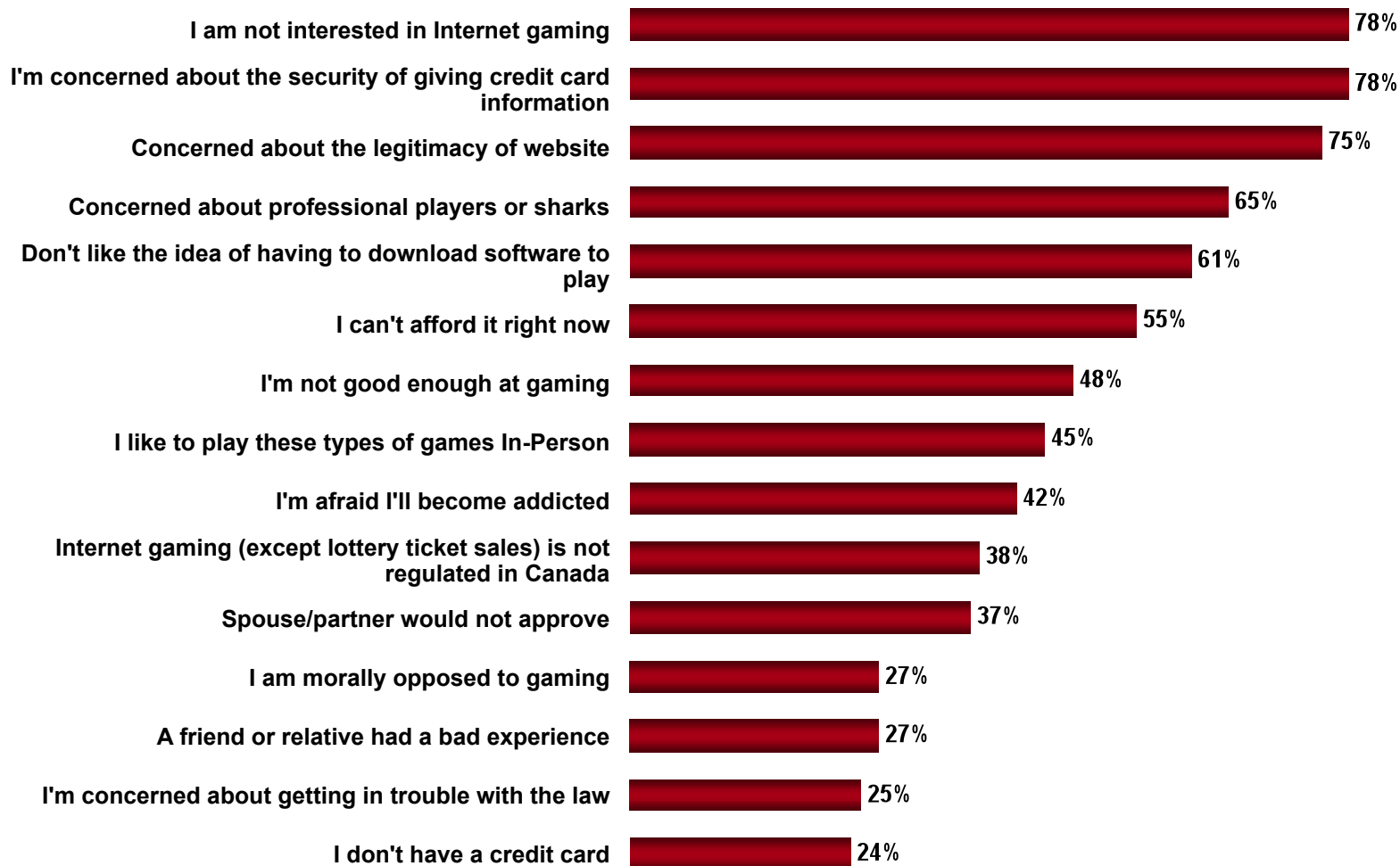
## Importance of Internet Gaming Site Attributes



G6. As someone who has played Internet games for real money, how important are each of the following aspects of an Internet gaming website to you personally? Please use a 7-point scale where 1 means the reason is 'Not at all Important', and 7 means it is a 'Very Important' reason.

## Reasons for Not Playing Internet Games for Money

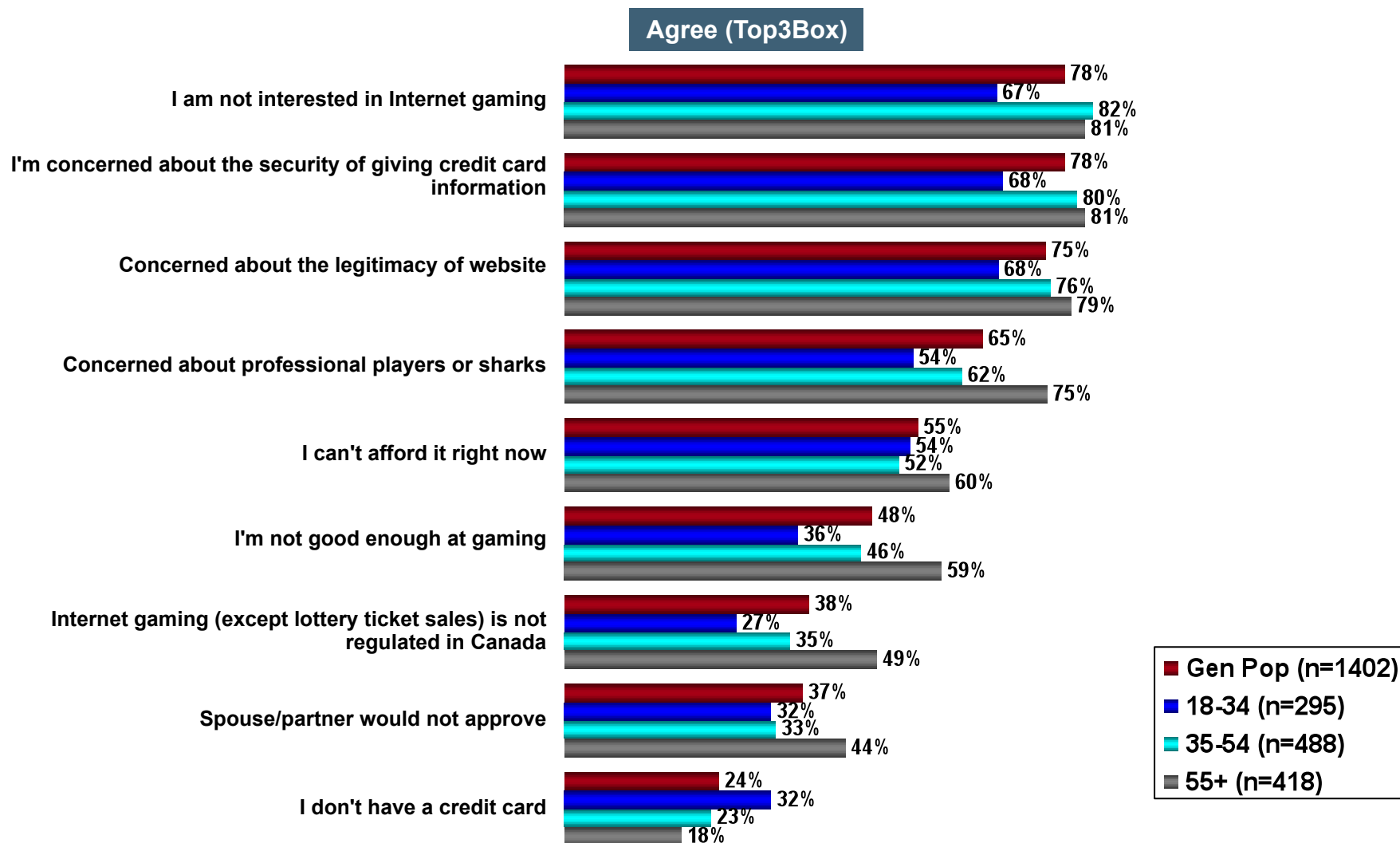
Agree (Top3Box)



G9. We're now going to show you some general reasons why some people have not played games on the Internet for real money. Please indicate if you agree or disagree with each reason as it applies to you personally using a 7-point scale where 1 is 'Strongly Disagree' and 7 is 'Strongly Agree'.



# Reasons for Not Playing Internet Games for Money by Age



G9. We're now going to show you some general reasons why some people have not played games on the Internet for real money. Please indicate if you agree or disagree with each reason as it applies to you personally using a 7-point scale where 1 is 'Strongly Disagree' and 7 is 'Strongly Agree'.

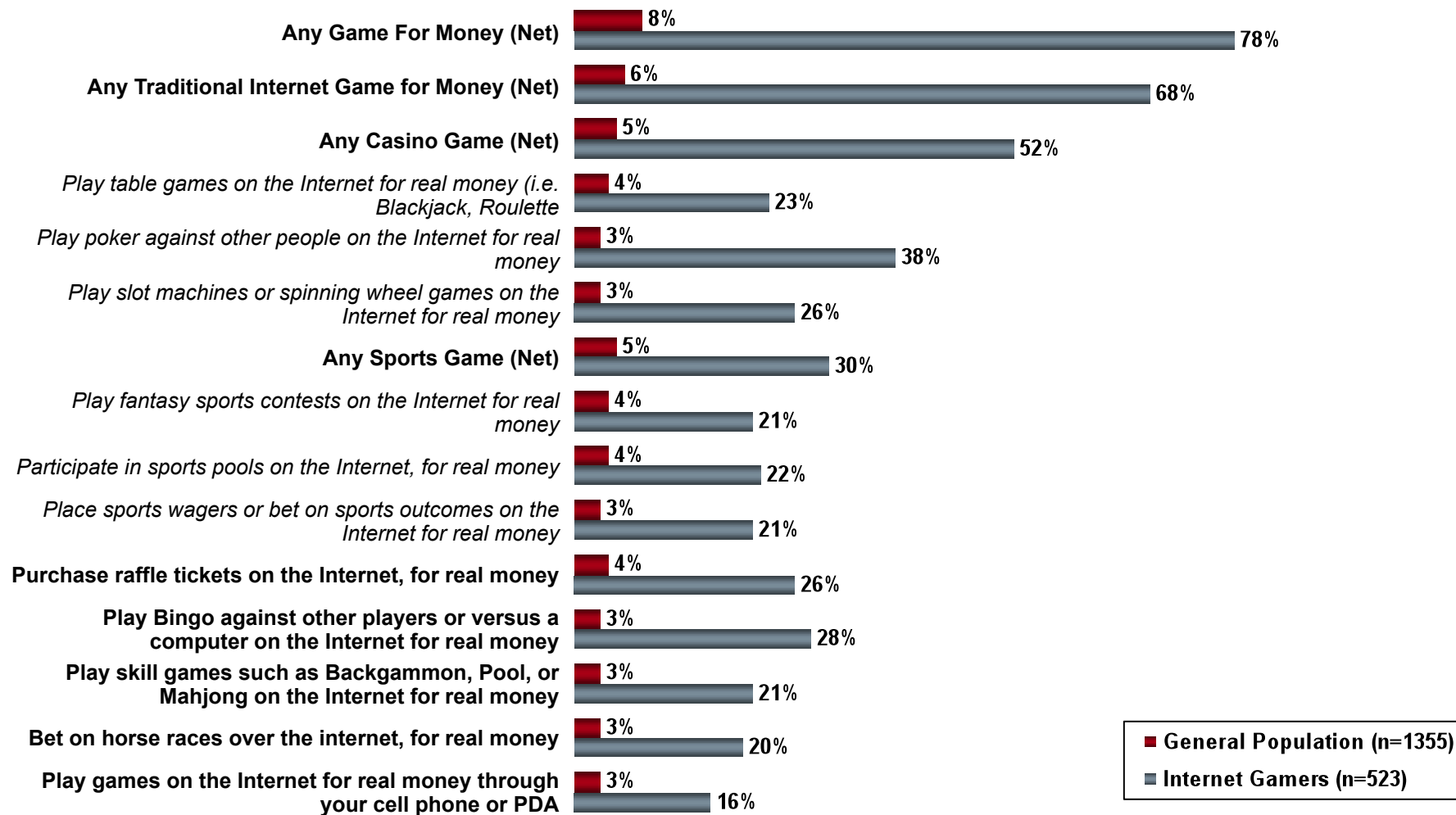


## Internet Gaming Behaviour – For Money



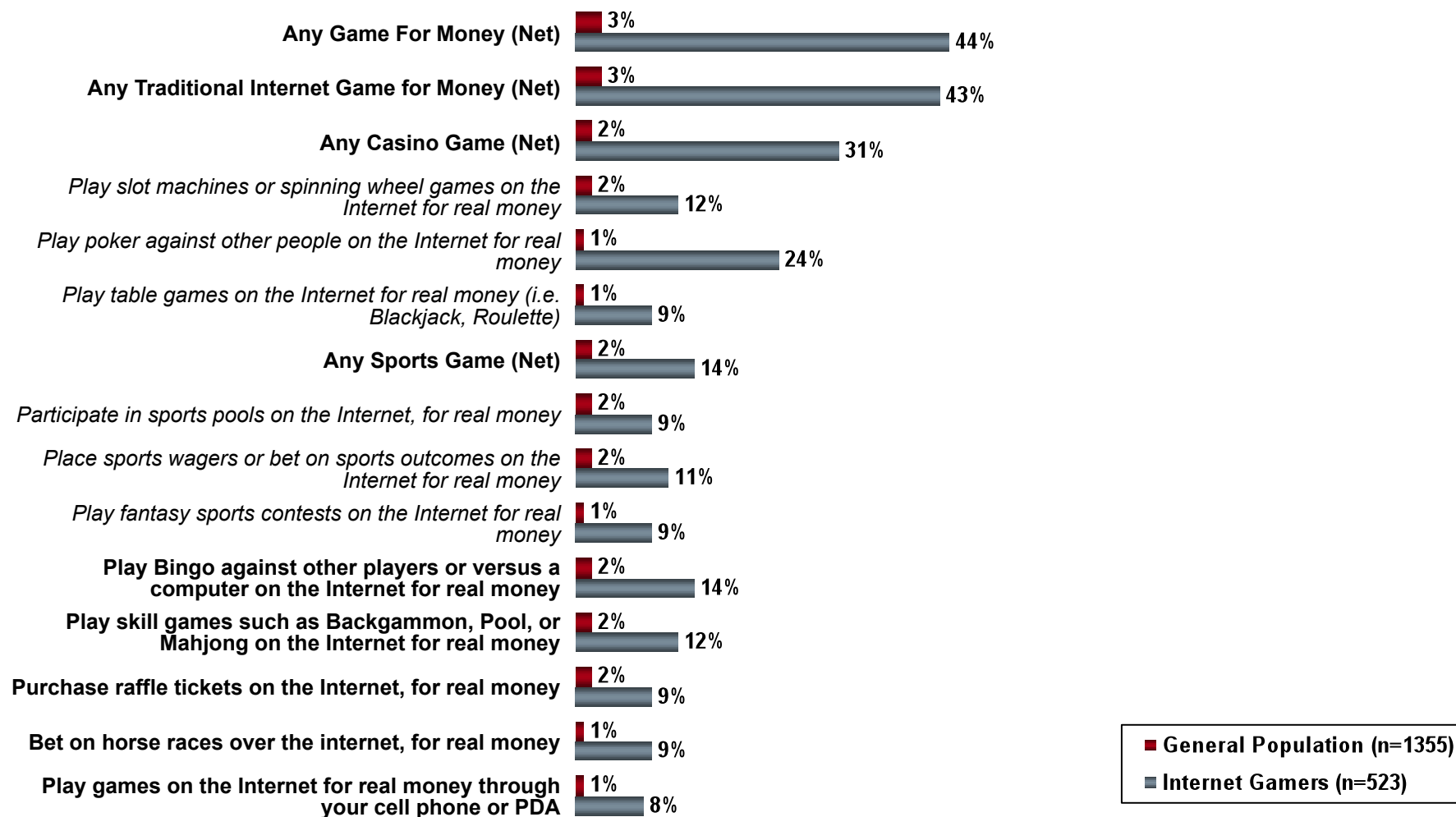
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# Participation in Internet Gaming – For Money: Once a Year or More



D1. For each of the following Internet games which you can play for real money, please choose the response that best represents how often you typically play, if at all, each type of game.

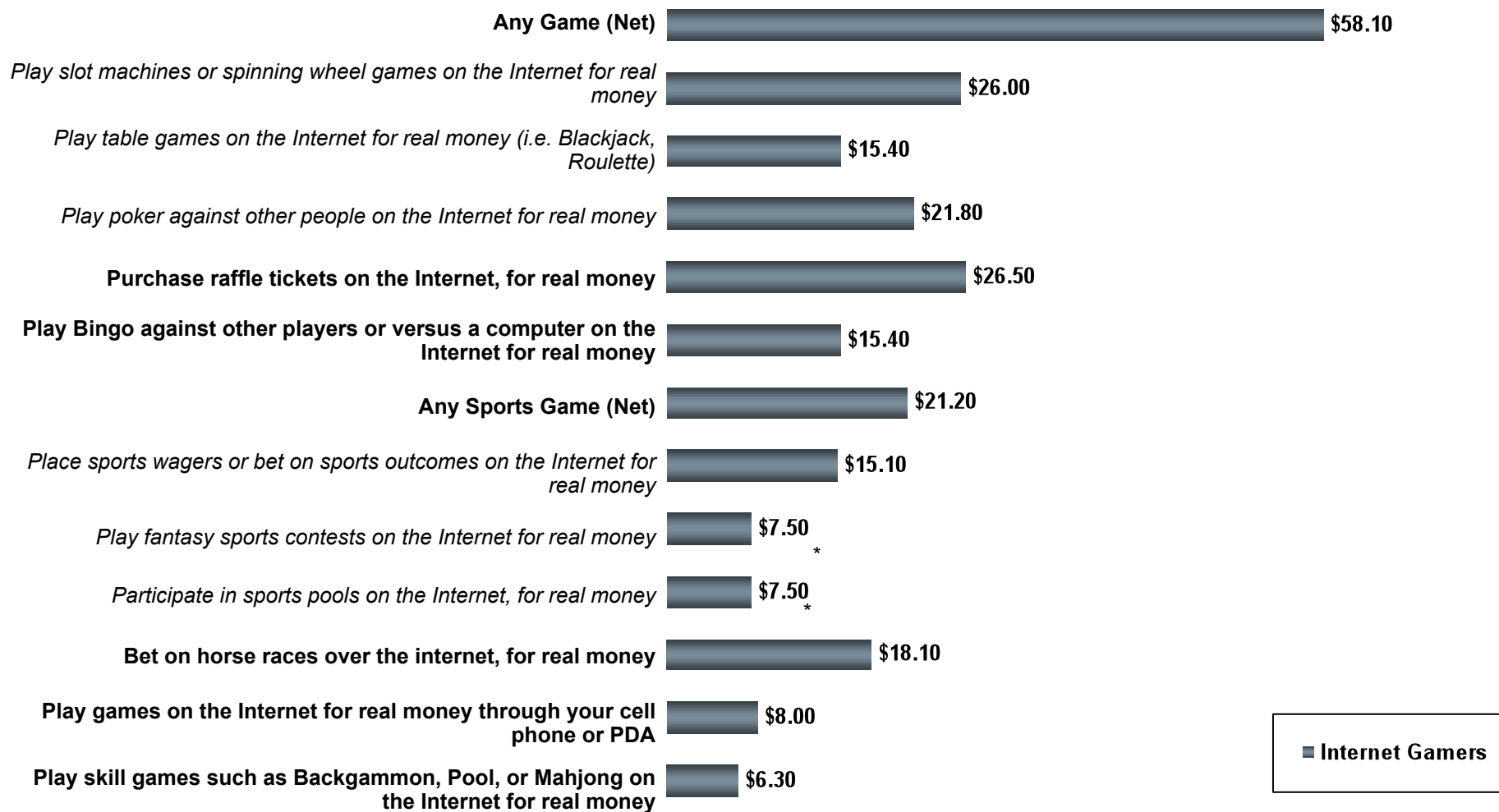
# Participation in Internet Gaming – For Money: Once a Month or More



D1. For each of the following Internet games which you can play for real money, please choose the response that best represents how often you typically play, if at all, each type of game.



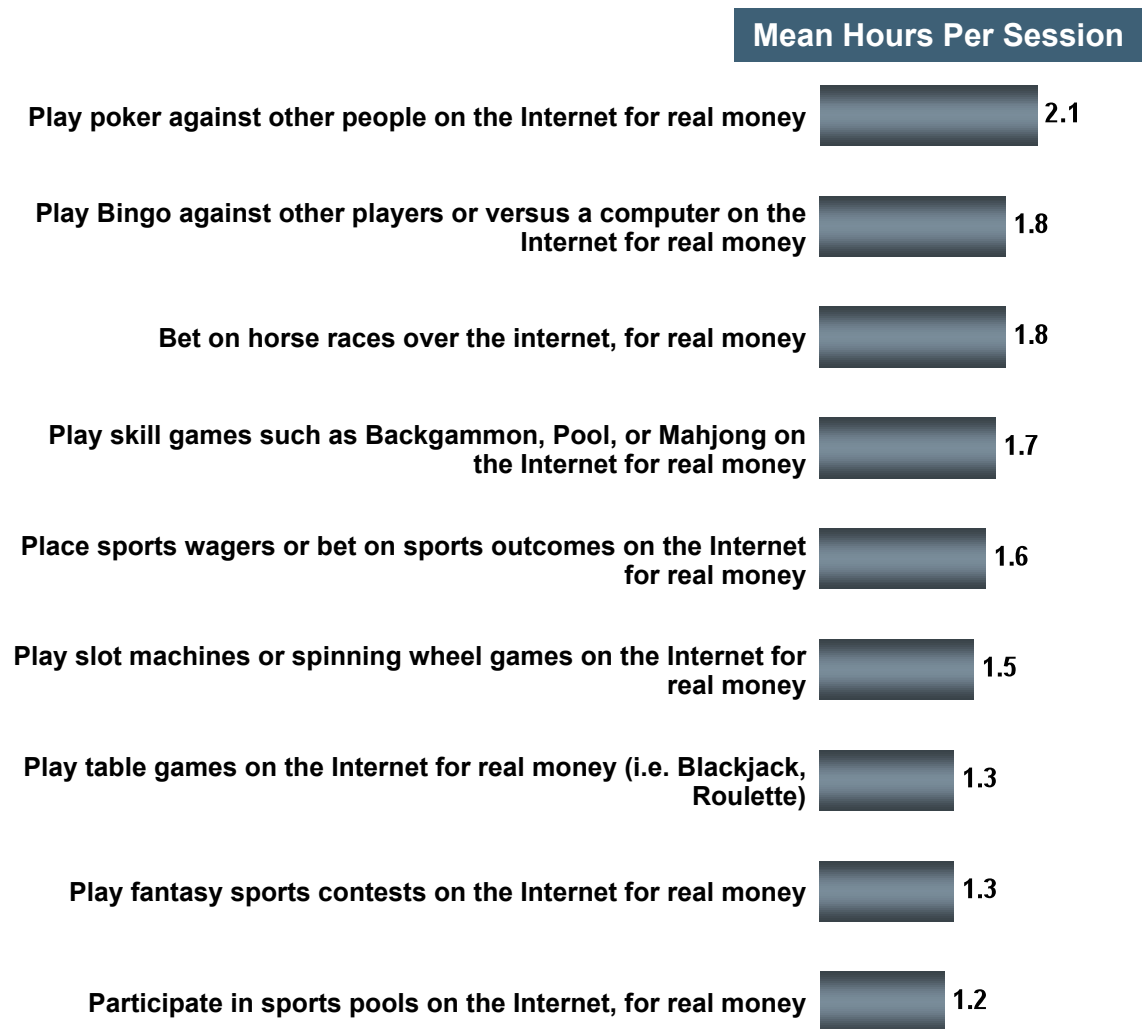
## Mean Past 4 Week Spending – Internet Games for Money



D3. In the spaces provided, please estimate the total amount of money you have wagered on each of the following activities in the past 4 weeks?



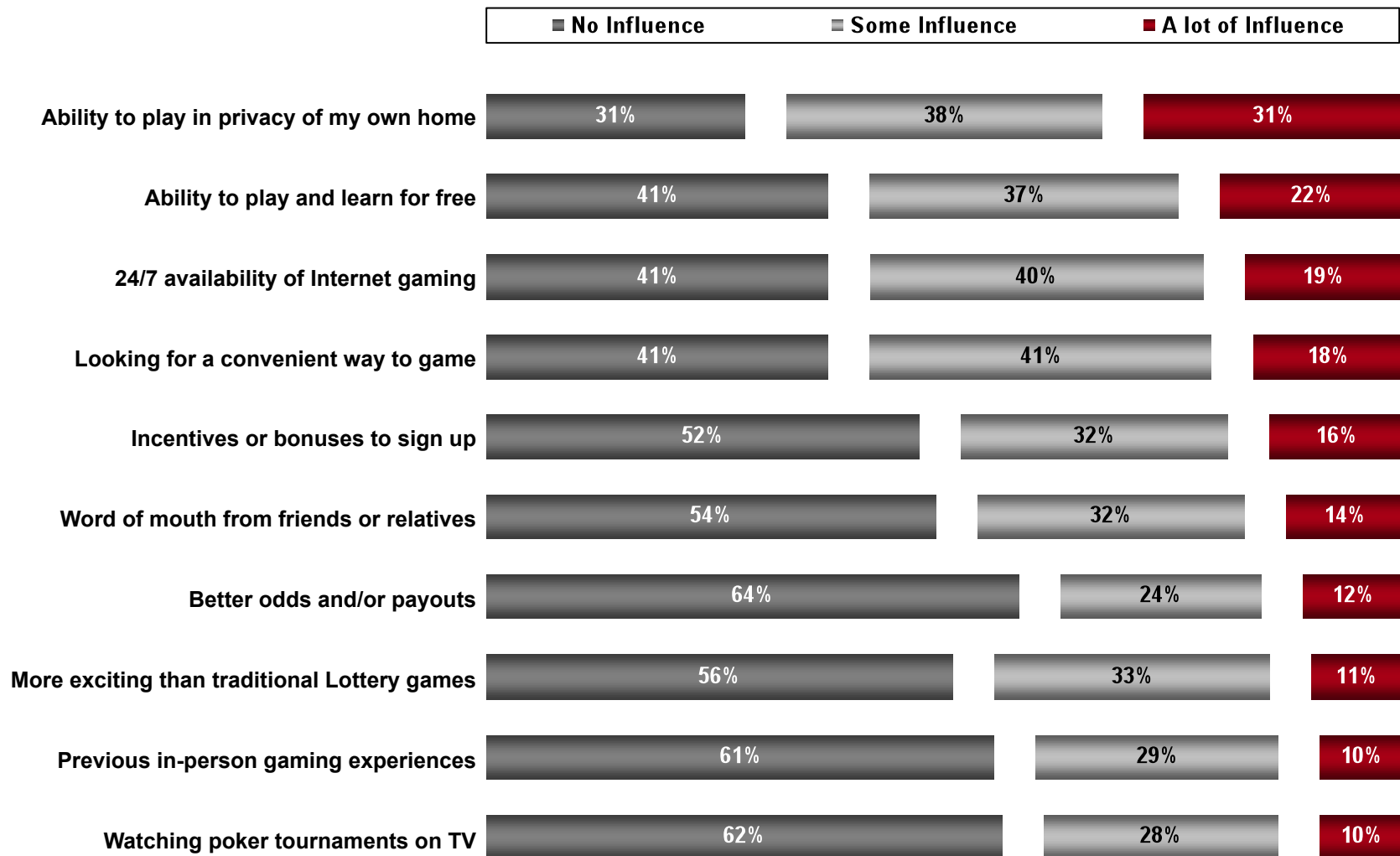
## Mean Number of Hours Spent Playing Internet Games for Money – Internet Gamers



D4. And now, for the same games, please estimate the number of hours you spend playing these each time you play.



## Influence of Factors on Decision to Internet Game for Money – Top 10



F1. How much influence did each of the following factors have on your decision to first begin wagering on the Internet, for real money?



## Pattern of Internet Gaming for Money

**I exclusively play at one Internet gaming website for real money**

**63%**

**I play at two or three different Internet gaming websites for real money**

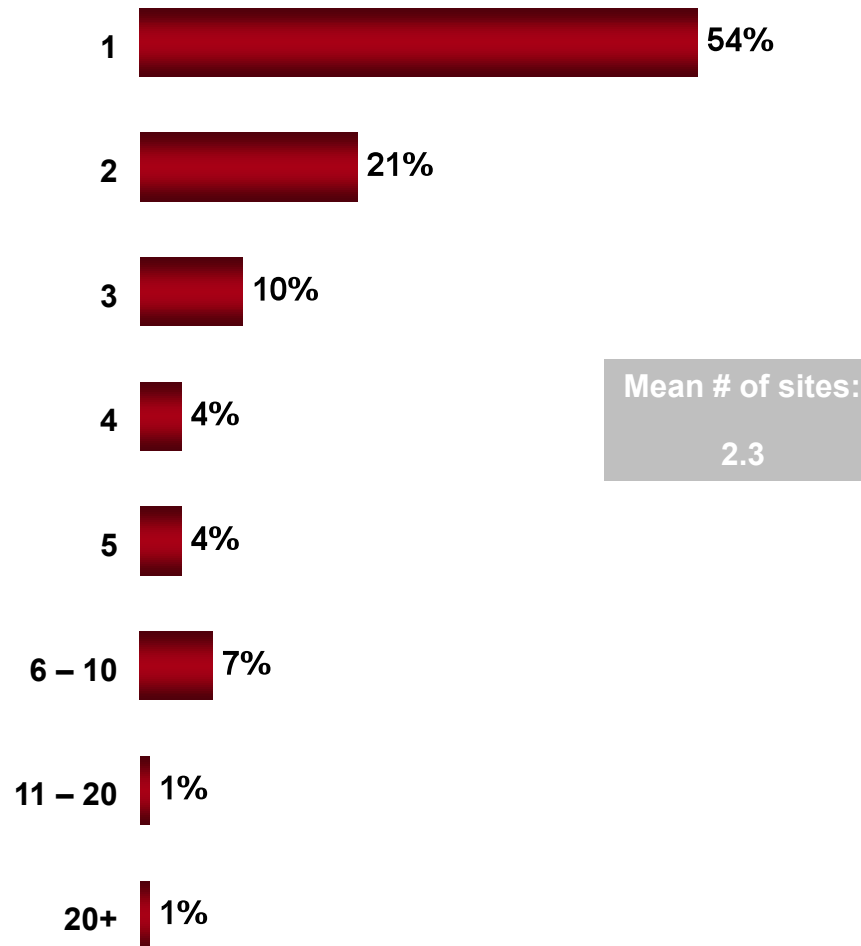
**24%**

**I shop around and play a large variety of Internet gaming websites for real money**

**13%**

*F3. Which of the statements below best describes your pattern of Internet gaming for real money? At any one time ...*

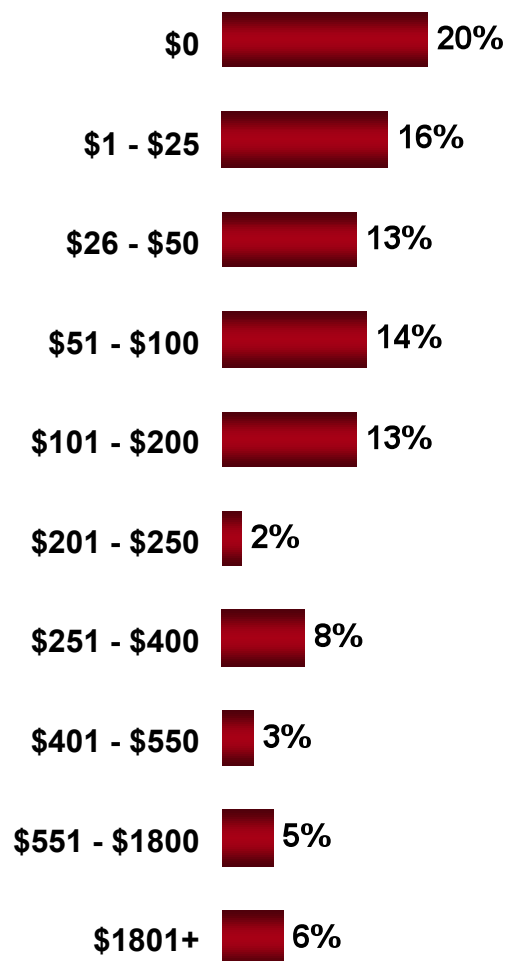
## Number of Internet Gaming Sites Registered With



F4. How many Internet gaming websites are you registered with?



## Amount Deposited in Internet Gaming Accounts – Past Year

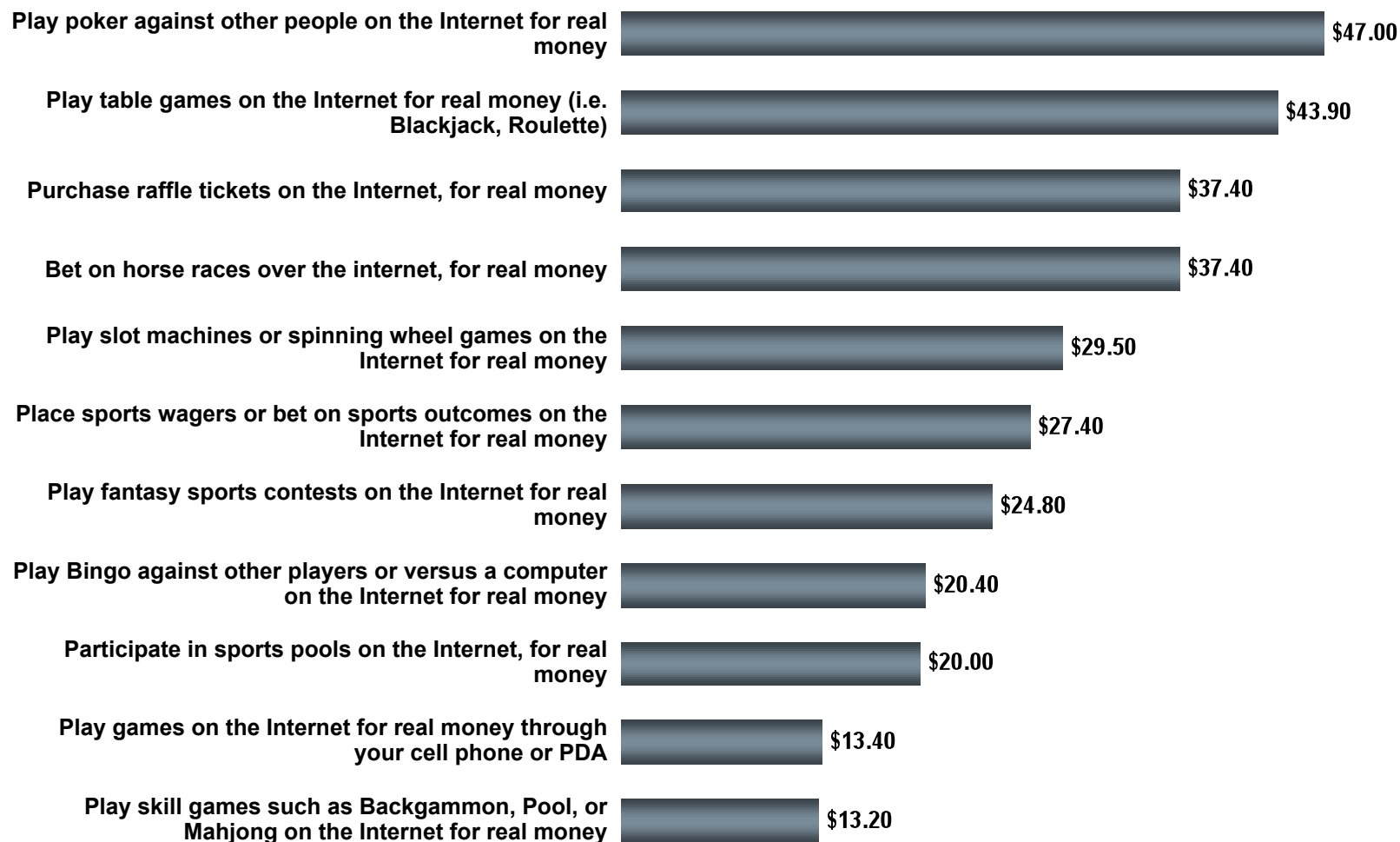


Mean \$ Deposited:  
\$319.10  
Median \$ Deposited  
\$60

F6. What is the approximate total amount of money you have deposited to ALL of your Internet gaming accounts in the past year?



## Maximum Amount Willing to Wager



F7. What is the maximum amount of money that you would be willing to wager in a single session when you...?

# Typical Method for Depositing Funds Into Internet Gaming Account



F8. How do you typically deposit funds into your Internet gaming account?

Base: Internet Gamers (n=523)



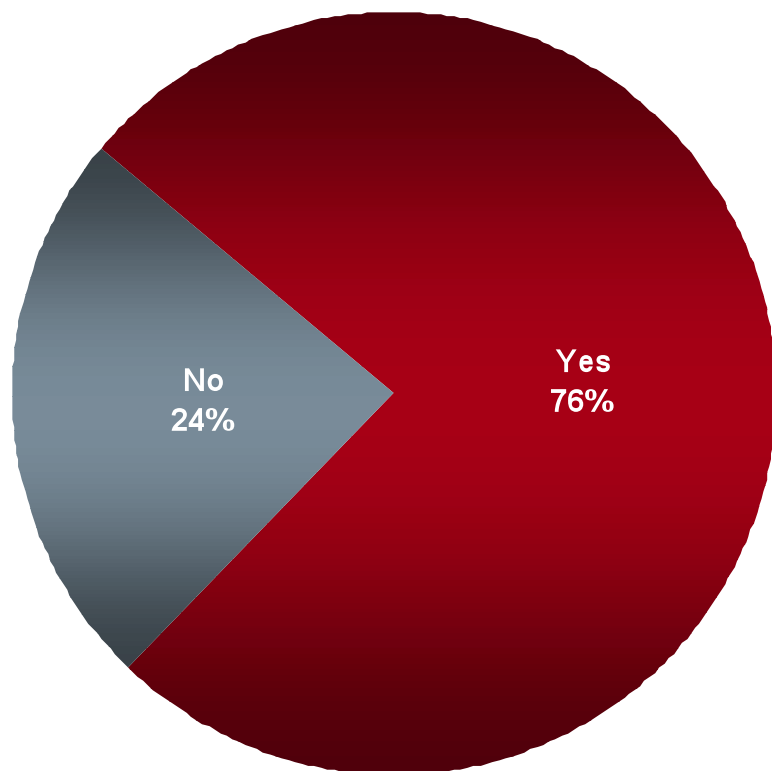
## Internet Gaming Behaviour – For Fun



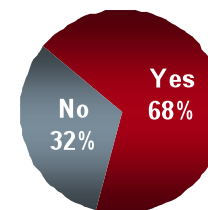
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# Participation in For Fun Gaming Before Playing for Money

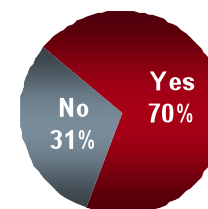
All Internet Gamers (n=523)



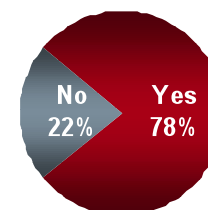
BC (n=96\*)



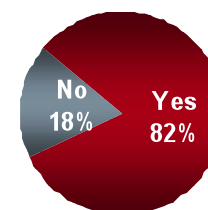
West (n=75\*)



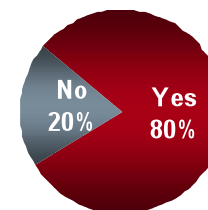
Ontario (n=248)



Quebec (n=51\*)



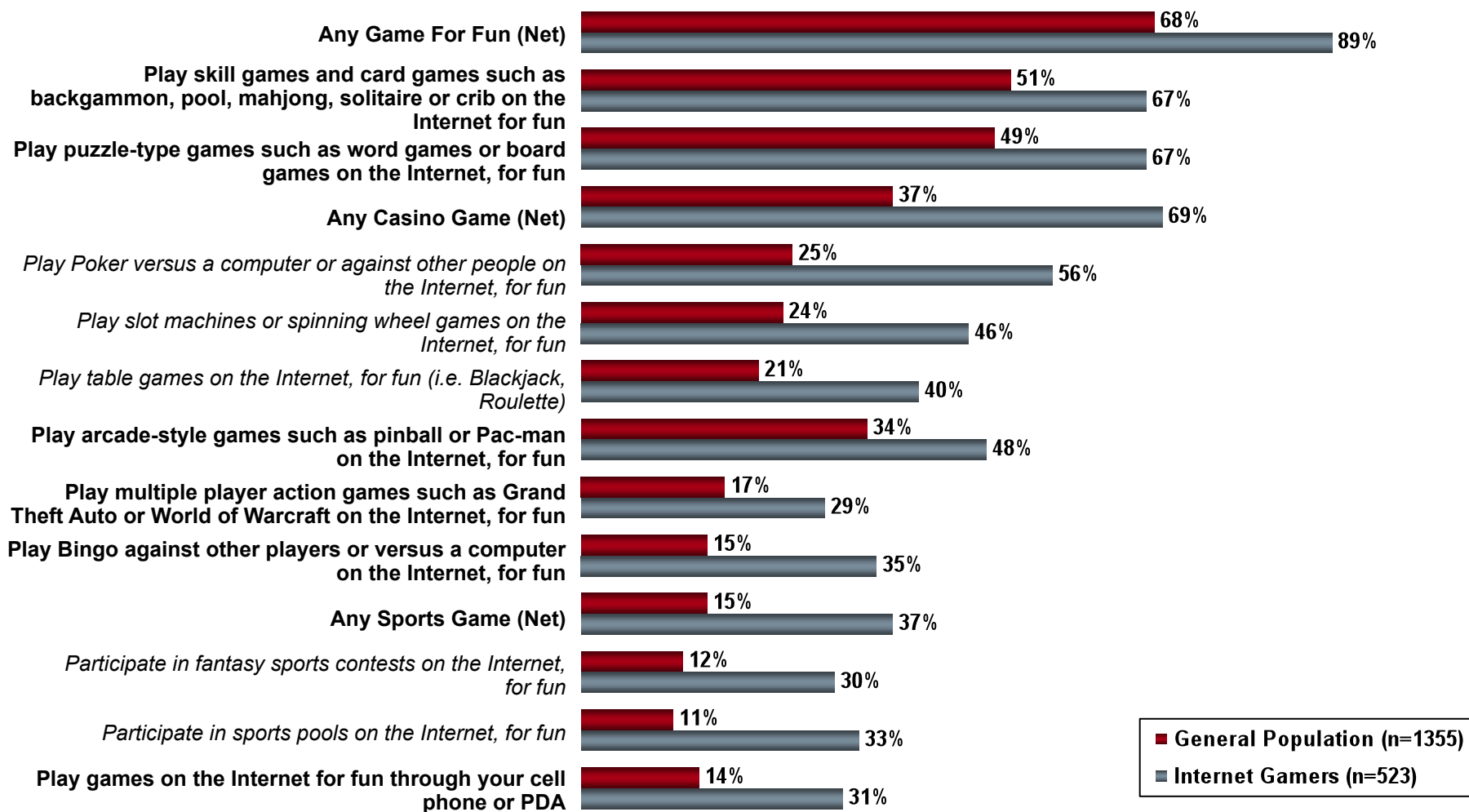
Maritimes (n=53\*)



F2. Did you play Internet games for 'fun' before you started playing for real money?



# Participation in Internet Gaming – For Fun: Once a Year or More



B1. For each of the following Internet gaming for fun activities please choose the response that best represents how often you typically play, if at all, each type of game.

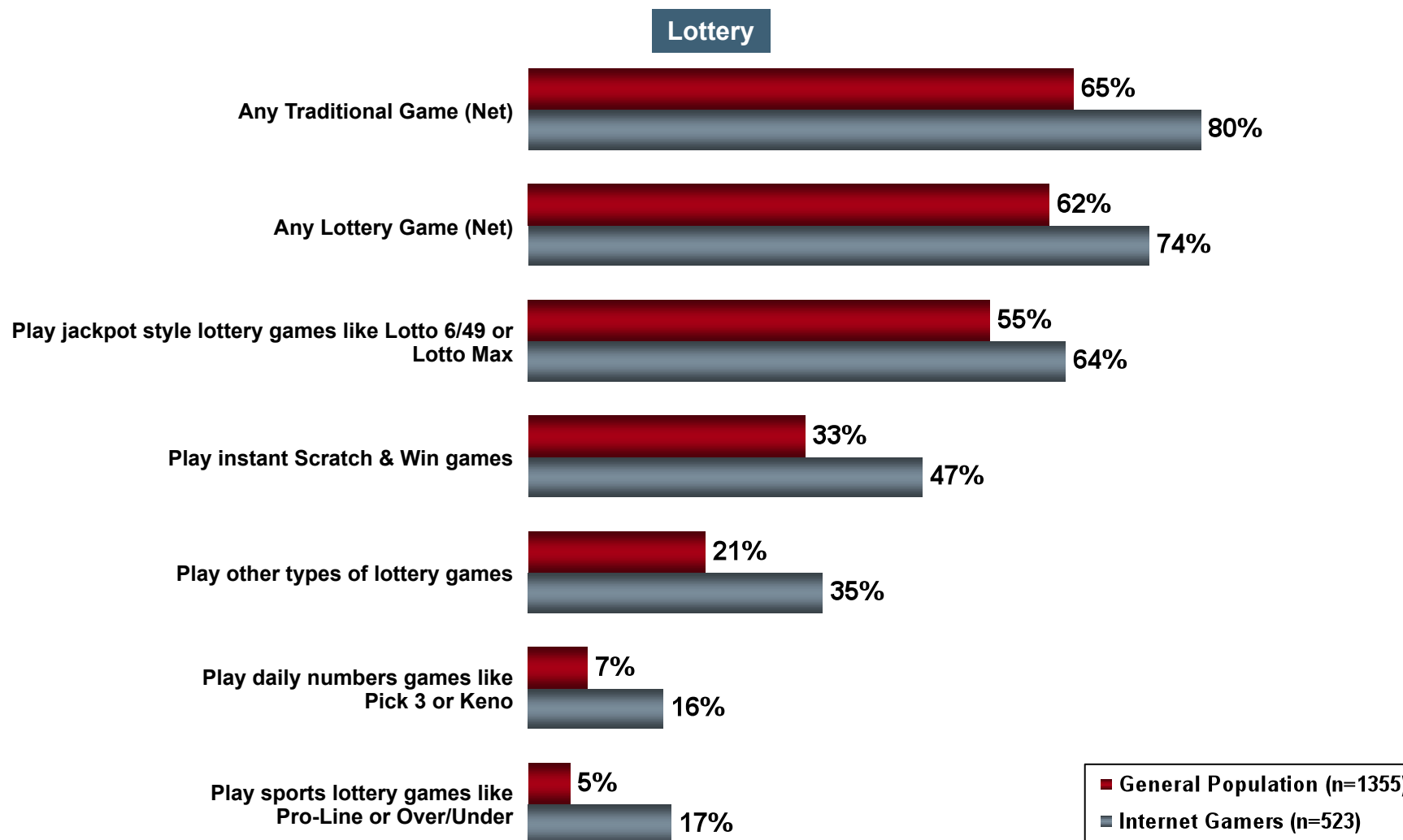


## Traditional Gaming Behaviour



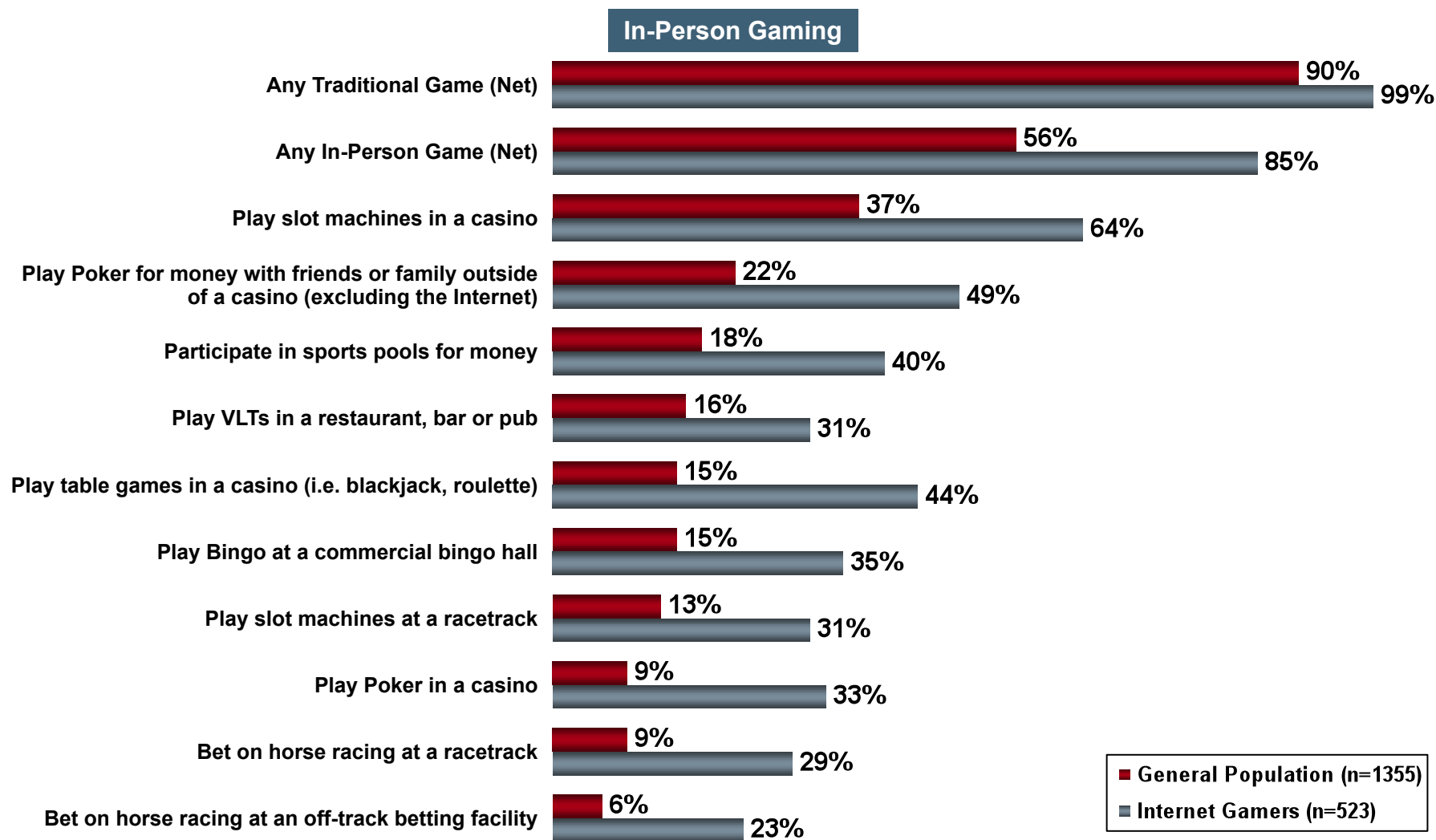
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# Participation in Traditional Gaming Activities: Lottery Games – Once a Month or More



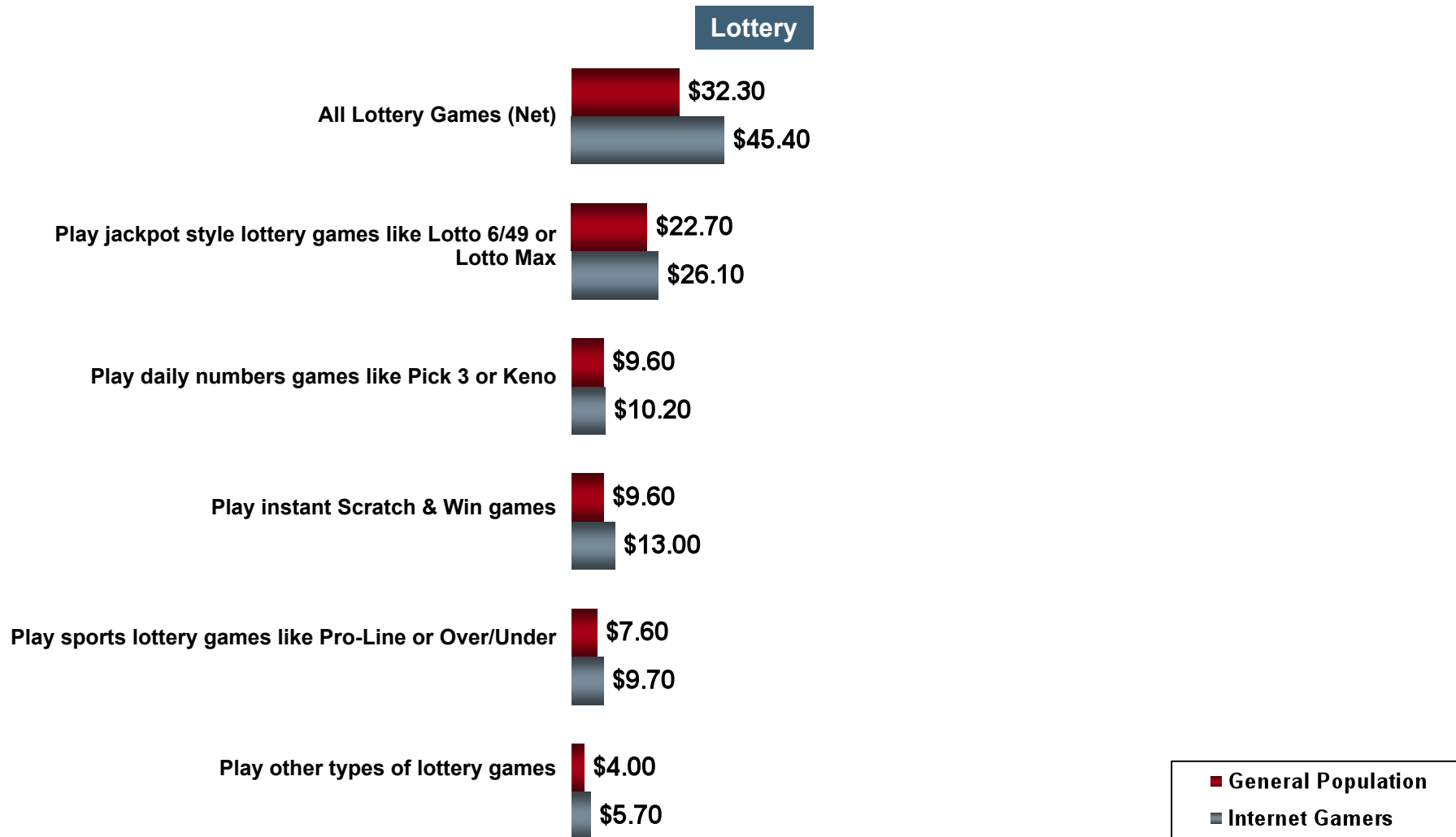
A1. For each of the following traditional gaming activities please choose the response that best represents how often you typically play, if at all, each type of game.

# Participation in Traditional Gaming Activities: In-Person Gaming – Once a Year or More



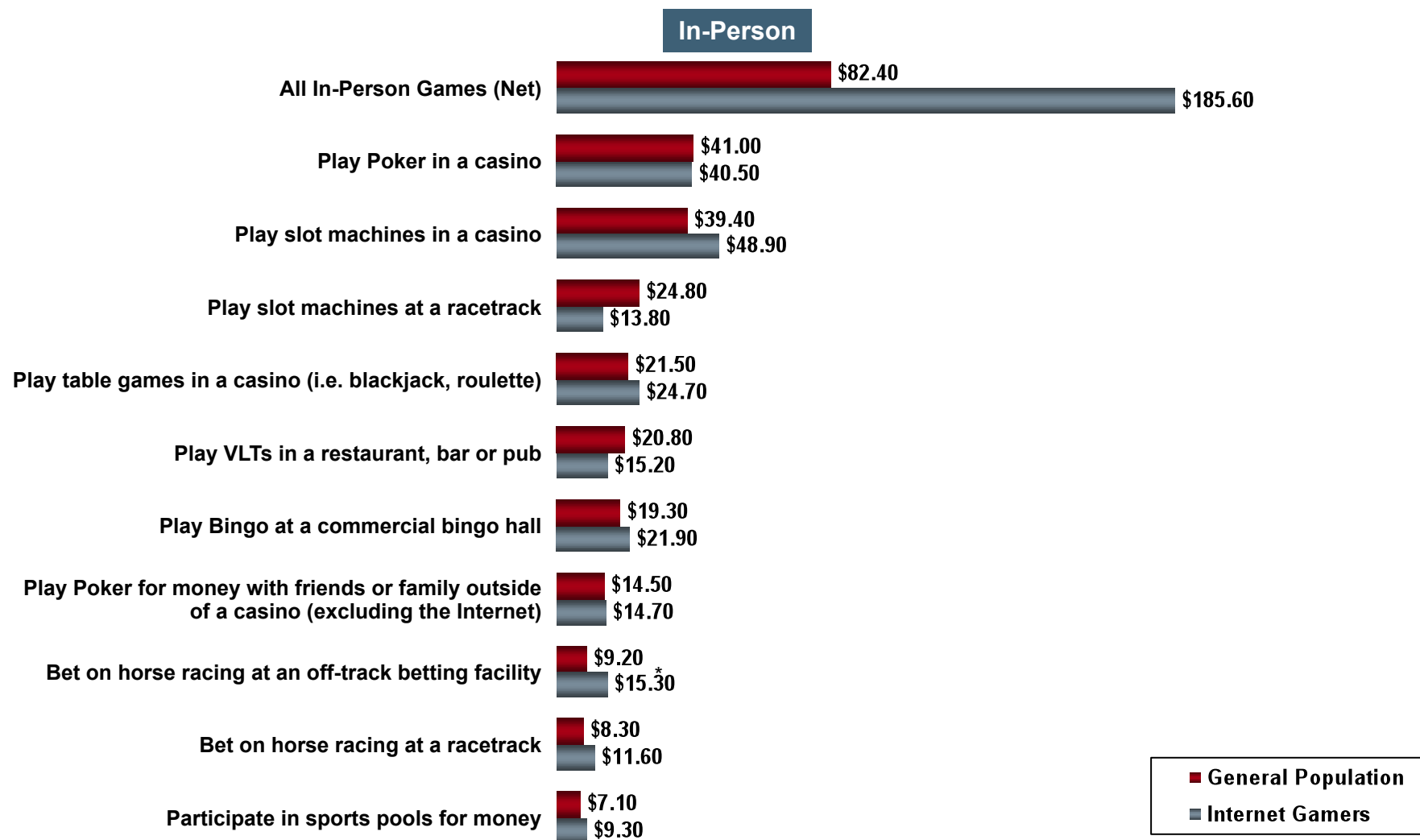
A1. For each of the following traditional gaming activities please choose the response that best represents how often you typically play, if at all, each type of game.

## Mean Past 4 Week Spending: Lottery Games



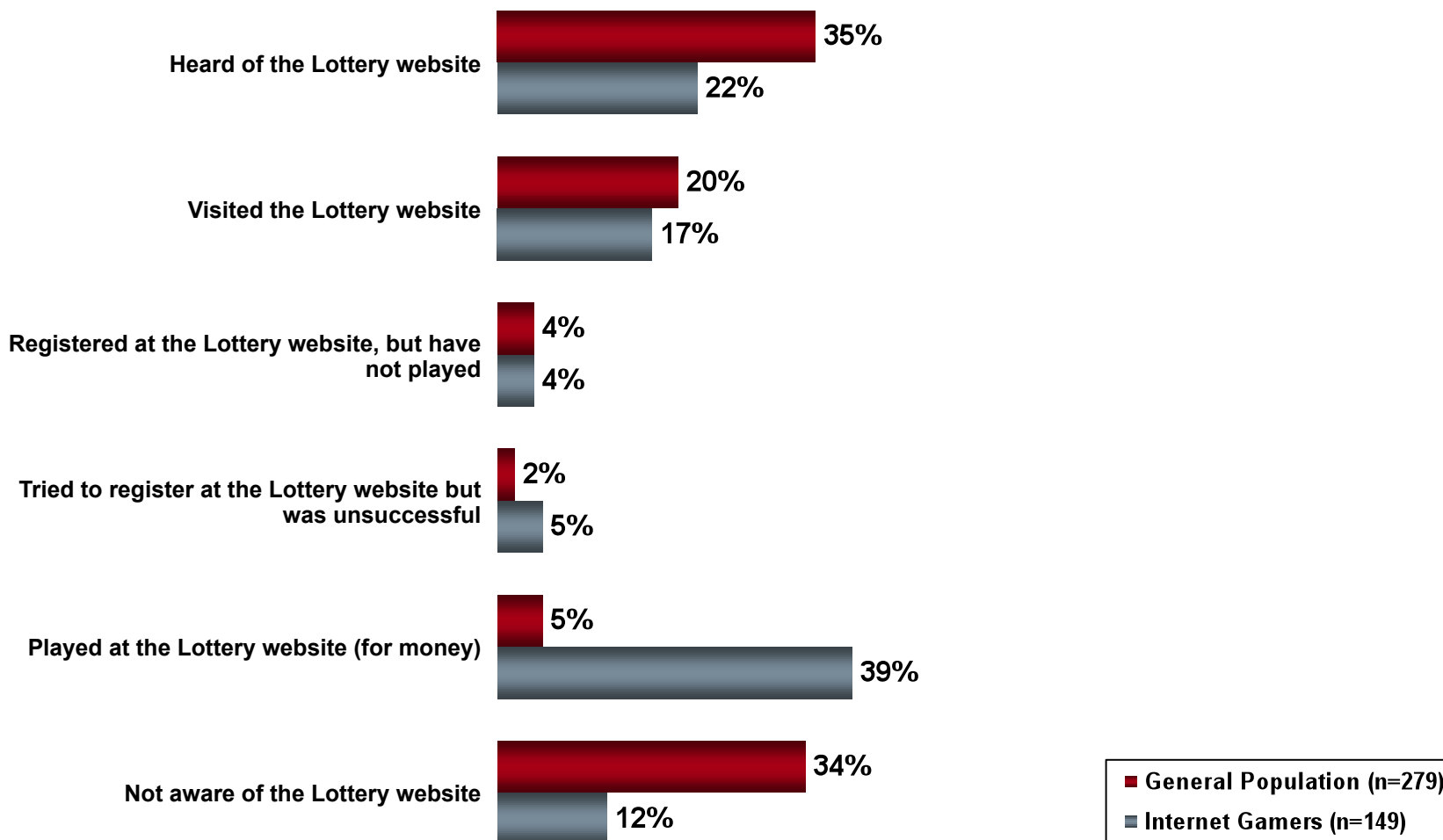
A2. In the spaces provided, please estimate the total amount of money you have wagered on each of the following activities in the past 4 weeks?

## Mean Past 4 Week Spending: In-Person Games



A2. In the spaces provided, please estimate the total amount of money you have wagered on each of the following activities in the past 4 weeks?

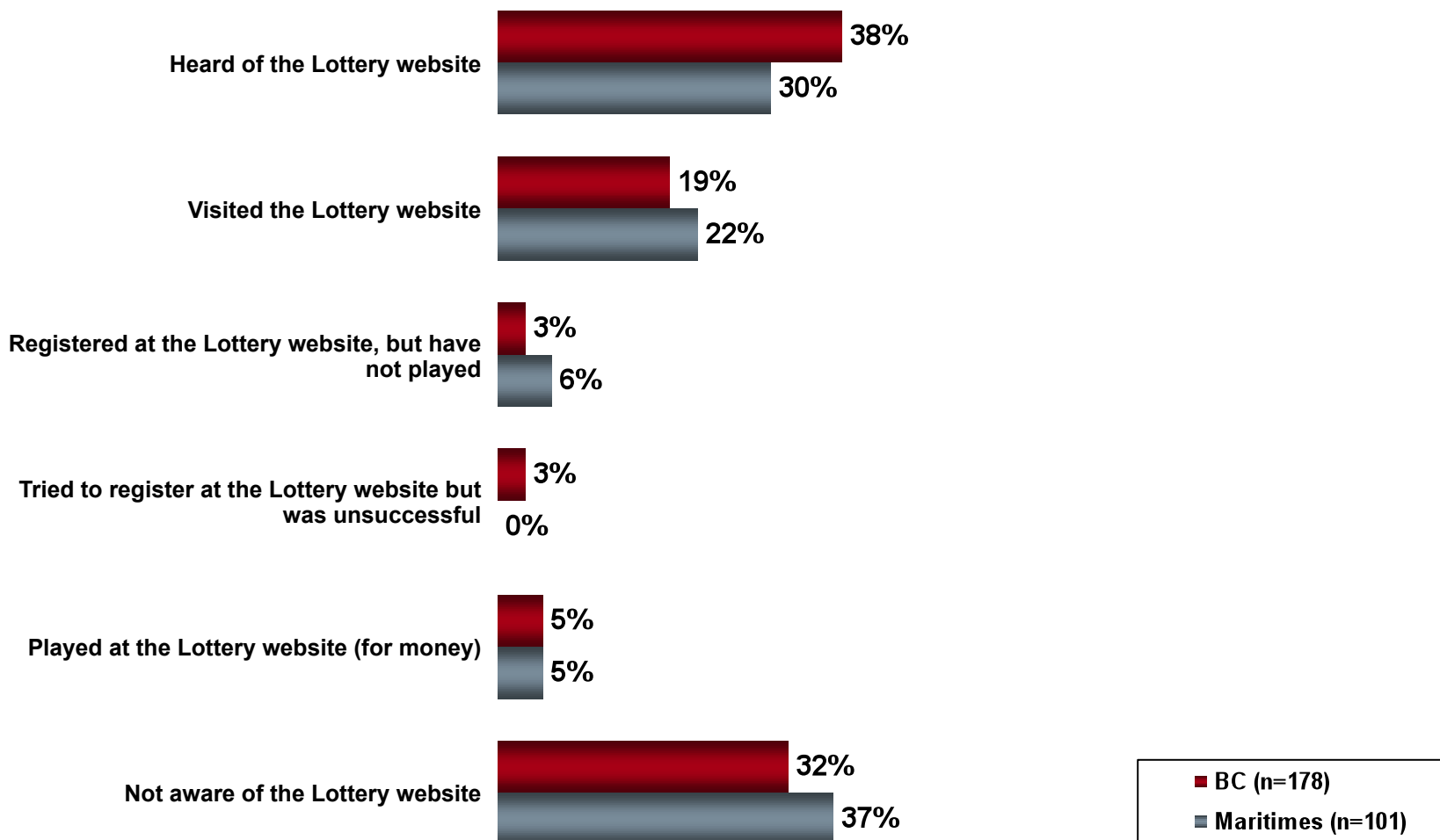
## Experience With Lottery Websites



A3. You currently live in a Province that sells lottery games via the Internet. Which of the following statements best describes your experience with the Lottery's website where you can register and play games?



## Experience With Lottery Websites: By Region



A3. You currently live in a Province that sells lottery games via the Internet. Which of the following statements best describes your experience with the Lottery's website where you can register and play games?

## Summary

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- ◆ Many Canadians think Internet gambling in Canada is legal and regulated.
- ◆ Integrity is the most important attribute of an Internet Gaming site to Gamers.
- ◆ Security and legitimacy are big barriers for non-players.
- ◆ Internet Gamers are engaged in all types of gaming both for fun and money.



Questions??



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