



CGA

Research Summit 2016 Research

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What We Needed to Learn

The overall objective of this research was to provide insight into how casinos can improve the overall offer to not only keep their current visitors returning, but to also appeal to those who are not currently visiting.



What are the barriers to visitation to non-players?



What is the opportunity for sports betting within Casinos/other venues?



Is there anything different that can be done to attract the Millennial Generation; the generation who are technology dependent, question everything, and don't currently find the casino relevant?



Are there any innovations that can ensure slot players continue to come back and play, such that any play experience doesn't become stale?

WHAT WE DID

Methodology

Approach



Phase 1

- 4 focus groups on April 4, 2016
- 1 group Slot Players
- 1 group Non-Casino Visitors
- 1 group Non-Casino Visitor Millennials
- 1 group Sports Bettors

Phase 2

The questionnaire was developed using inputs generated from the first qualitative phase.

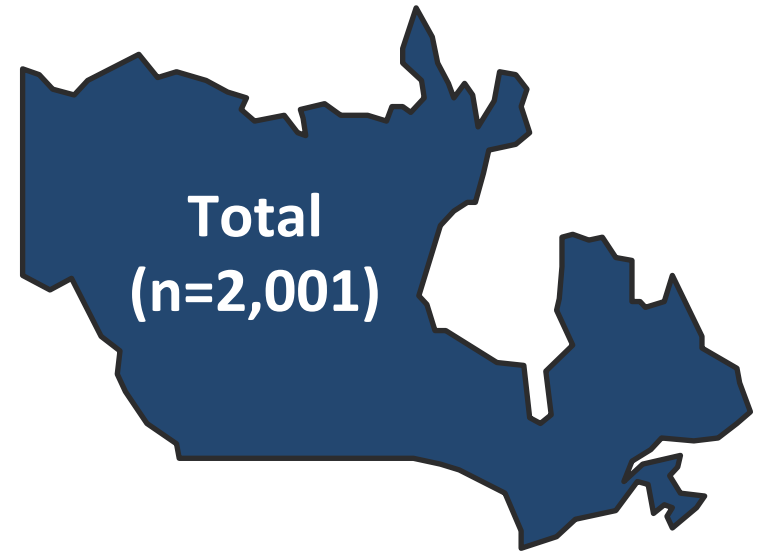
- Online survey with n=2001 Canadians (representative to the population) who are not morally opposed to gambling.
- April 29-May 5th, 2016
- Approximately a 20 minute survey
- Respondents could access the survey from their phones, tablets, desktops, or laptops (i.e. Device Agnostic).

Questions included:

- Entertainment participation
- Casino participation, awareness, spend and importance of service offerings
- Slot player deep dive
- Other gambling participation
- Barriers and motivations to visit
- Sports betting and future landscape

Reporting Groups

Subgroup analysis was conducted according to the following dimensions where possible:



Casino Visitor Types

Casino Visitor (n=746)

Non-Casino Visitors (n=1,255)

Non-Casino Visitors (Millennials 18-34)
(n=356)

Non-Casino Visitors (35+) (n=899)

Sports Bettors


Sports Bettors (n=236)

Non-Sports Bettors (n=461)
(At least interested in sports)

Slots Players (Among Casino Visitors)

Slot Players (n=604)
(Play 1-2 times a year or more often)

Non-Slot Players (n=142)

A photograph of three people in a casino setting. On the left, a man in a dark shirt is looking towards the camera with a playful expression, his hands raised. In the center, a woman with blonde hair is smiling and holding a martini glass. On the right, another woman with dark hair is leaning over a roulette table, looking at the camera with a smile. The roulette table is blue with various betting numbers and chips. The background is blurred, showing other casino lights and activity.

SECTION A CASINO ATTITUDES AND PARTICIPATION



KEY LEARNINGS

1

In Canada, roughly two-in-five (37%) have gambled at a casino or slot gaming centre in the past year with just over one-in-ten (12%) doing so on a weekly and monthly basis. Across the country, participation differs among the provinces. Half (50%) of those from New Brunswick state they have gambled in the past year, while only 21% of those from Nova Scotia stated this. Among larger provinces, the differences aren't as varied. Ontario has the largest portion of recent gamblers at 41% while Quebec has the smallest proportion at 33%.

BC and Ontario casino visits are over-represented on a national basis when compared to the population, while Quebec is under-represented.

2

Casino visitors are by nature social creatures – they 'out-activity' non-casino visitors nearly 2:1 on a weekly basis overall. Just over four in ten (42%) of casino visitors dine out on a weekly basis, compared to a quarter (26%) of non-visitors. Just under 10% of visitors go out to a movie on a weekly basis, compared to 1% of non-visitors. Non-visitors do not attend museums or amusement parks on a weekly basis whereas 3% of visitors do.

KEY LEARNINGS

3

In Canada, slot play dominated awareness, participation and share of spend. Table games shared high levels of awareness, but much lower levels of participation when compared to slot play (76% vs 27%). Gaming accounted for 56% share of spend and was driven primarily by slots and table games. Of the \$205 mean spend per last casino visit (including amenities), nearly a third (30%) was spent on slots, while 17% was spent on table games.

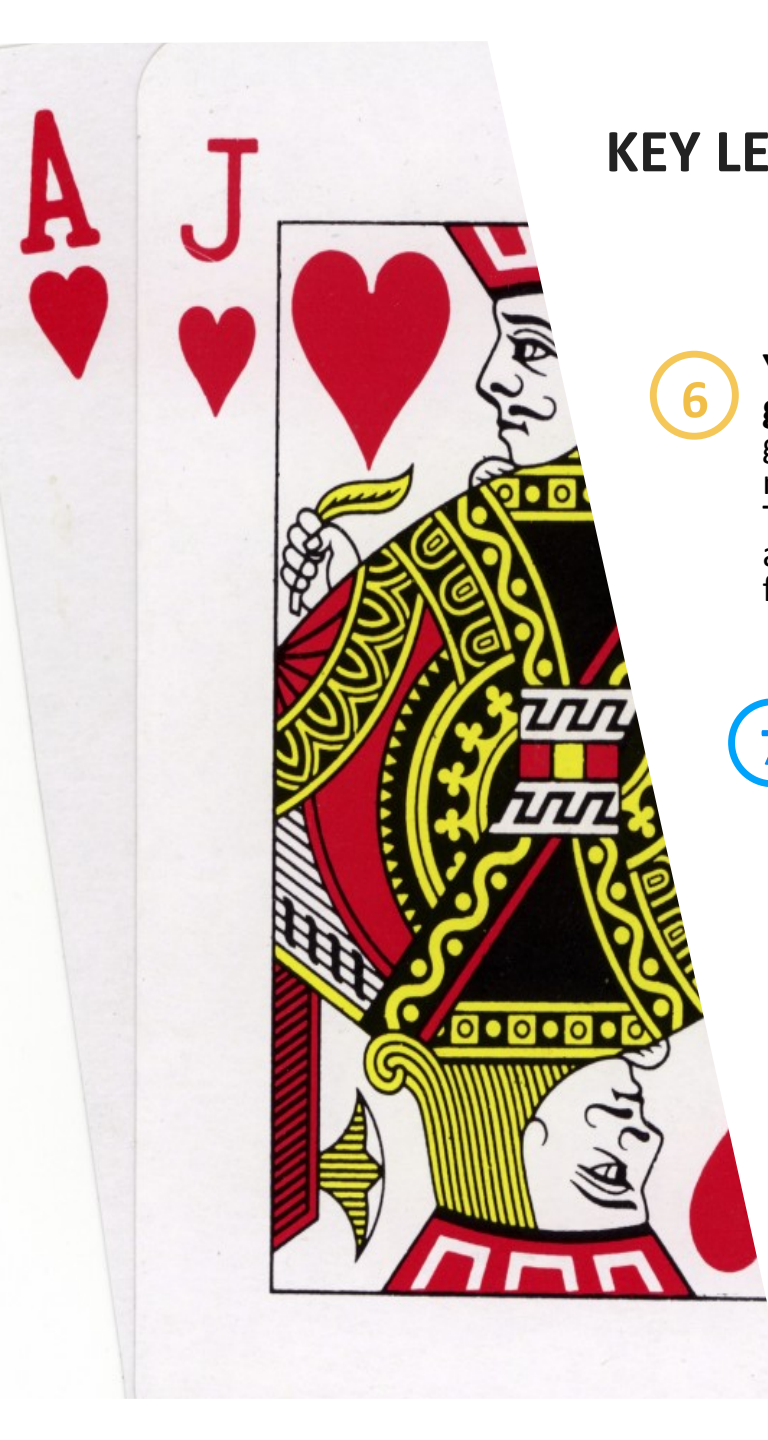
4

Awareness of casino amenities in general is fairly strong, with dining and drinks at the bar/lounge leading the way in awareness (78% and 76%, respectively) and participation (43% and 38%, respectively). Although within many casinos, awareness of specific amenities offered is fairly low. Mean spend on amenities accounts for 44% of total spend (\$205) which is spread across a number of activities including hotel stay (14%); restaurant dining (13%) and drinks at the bar/lounge (7%).

5

Awareness, both unaided and aided, by province of casino or gaming facilities is fairly strong. Quebec has the highest levels of unaided awareness (91%), whereas the lowest levels are found in AB (77%) and BC (77%). On an unaided basis, there are generally one or two casinos within a province that stand out for respondents. For example, Halifax Casino (86%); Casino Montreal (79%); and Fallsview Casino Resort (52%) lead the way on an unaided basis.

KEY LEARNINGS

- 
- 6** **Younger casino visitors (18-34) tend to partake in table games more often than older visitors (35+).** Among all table games, younger players (18-34) are twice as likely to play at monthly or more frequently than those 35+, by at least 9 points. The social component associated with table games could be an appealing factor for the younger age group. Slot play however is fairly comparable between age subgroups.
- 7** **Among casino visitors that were non-slot players, one third (32%) stated they were likely to visit a casino in the next 12 months.** Non-visitors were less likely to visit a casino or gaming facility in the near future with 8% stating likelihood of visiting a casino or gambling facility in the next 12 months.
- 8** **Cleanliness, safety, and overall atmosphere are the most important factors for current visitors when choosing to visit a casino or gaming facility.** The ease of getting to the facility, variety of slot machines, quality of dining options and customer service were also important factors for visitors when deciding between various gaming destinations.

Lottery Games Participation – Across Canada

BC Region

82%

Casino Visitor
93%

Non-Visitor
74%

Aged 18 to 34
80%

Aged 35+
82%

WCLC Regions

80%

Casino Visitor
94%

Non-Visitor
72%

Aged 18 to 34
69%

Aged 35+
84%

Ontario Regions

82%

Casino Visitor
96%

Non-Visitor
73%

Aged 18 to 34
76%

Aged 35+
84%

Quebec Regions

79%

Casino Visitor
90%

Non-Visitor
73%

Aged 18 to 34
66%

Aged 35+
85%

ALC Regions

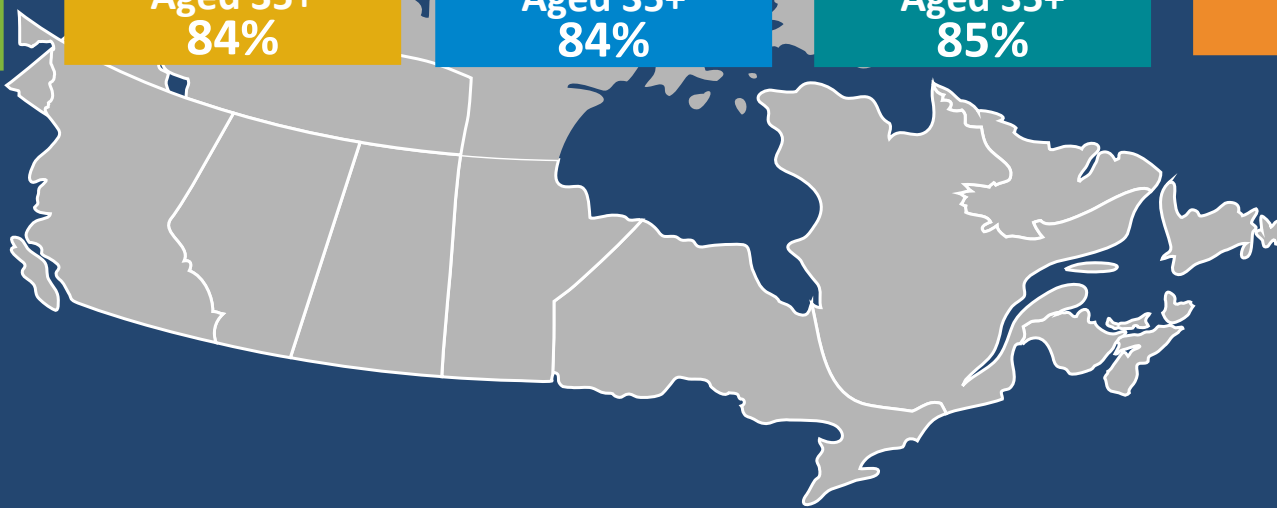
88%

Casino Visitor
small base

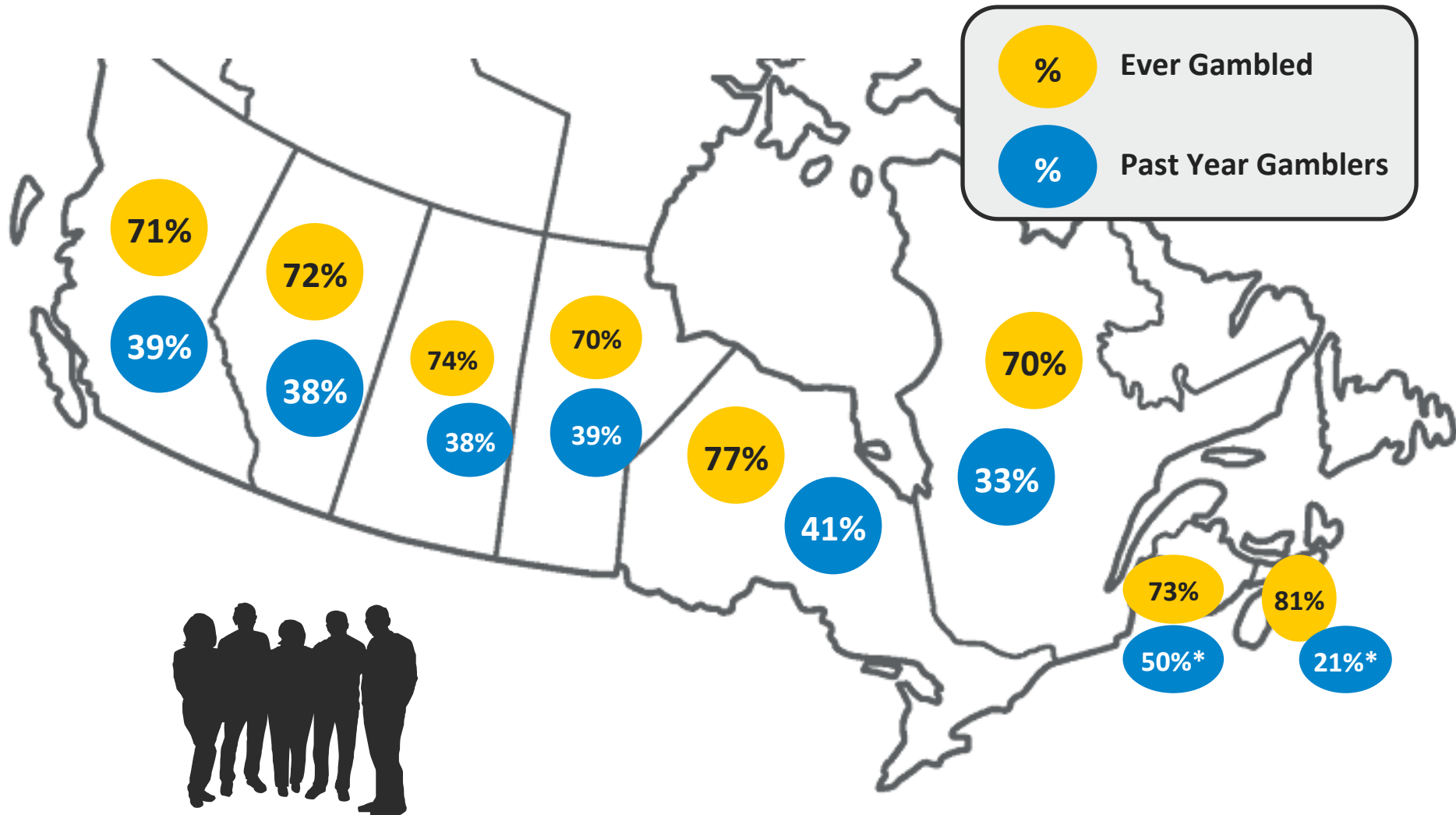
Non-Visitor
84%

Aged 18 to 34
small base

Aged 35+
92%

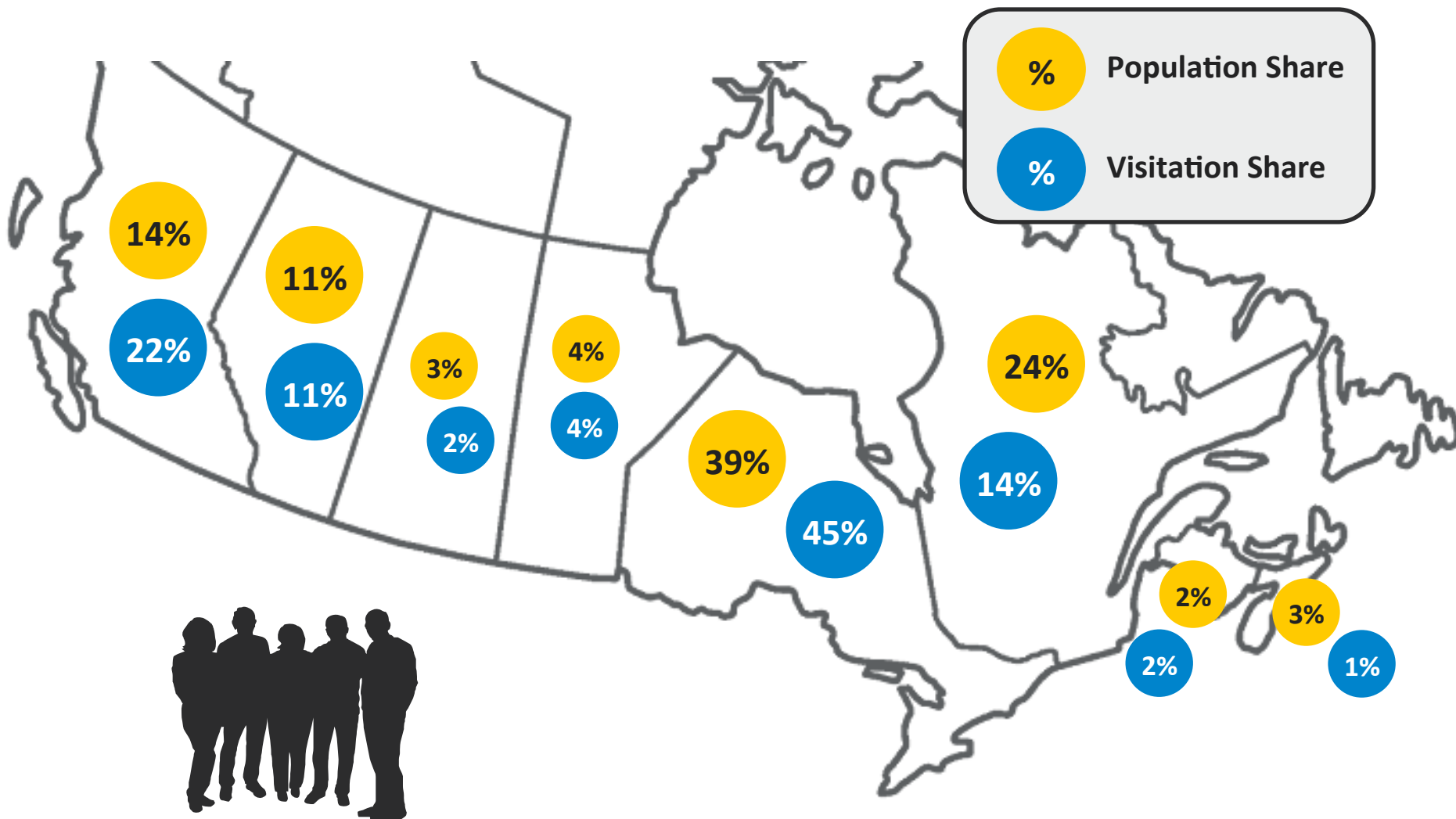


Casino/CGC Gamblers by Province



Base: Aware of [INSERT CASINO] and has visited casinos in past year * Small base size, interpret with caution.
S2. When was the last time you participated in one of the following activities in the province where you live?

Population vs. Past Year Casino/CGC Visitation Share by Province



Base: Aware of [INSERT CASINO] and has visited casinos in past year

A7. In the past year, how many times did you visit each of the following casino/community gaming centres in the province where you live?

Activity and Frequency of Participation

■ Total
(n=2,001)

■ Casino Visitors
(n=746)

■ Non-Casino Visitors
(n=1,255)

Any Activity (Net)

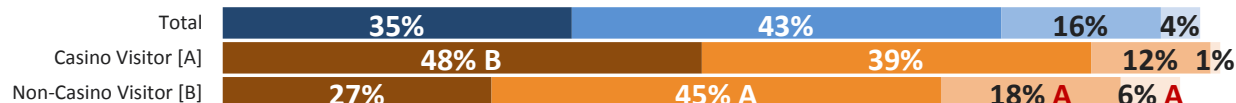
■ Core
(weekly)

■ Moderate
(monthly)

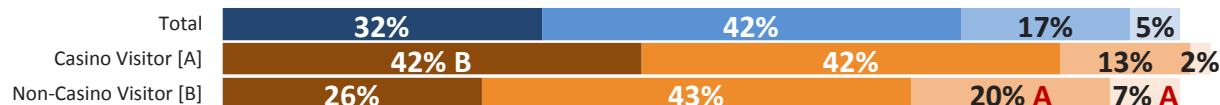
■ Light (every
2-5 months)

■ Casual (once or
twice a year/
or less often)

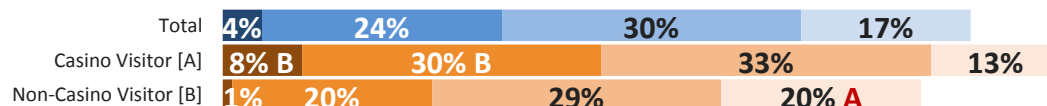
Any Activity (Net)



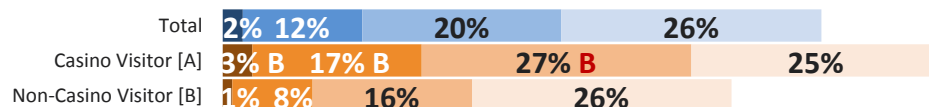
Dined out at a restaurant



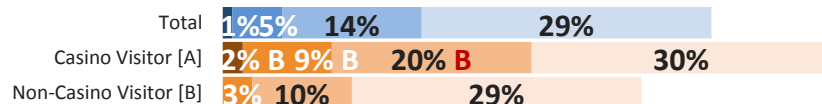
Went to the movie theatre



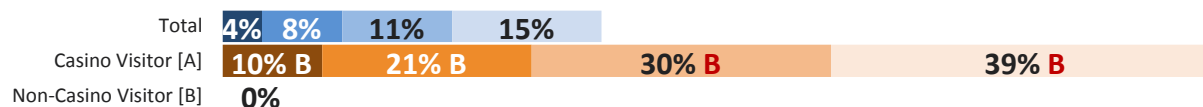
Attended a live show or sporting event



Went to a museum or amusement park



Gambled at a casino/ community gaming centre



Participated in Past Year

98%
100% B
97%

97%
99% B
96%

75%
84% B
69%

59%
72% B
51%

49%
61% B
42%

37%
100% B
0%

AB Significantly higher than other subgroup.

Base: All respondents

S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

Casino visitors are by nature social creatures – they **'out-activity'** **non-casino visitors** nearly **2:1** on a weekly basis overall.

Nearly **2:1** dining out weekly.

3:1 live show/sporting event or museum/amusement park monthly or more often.

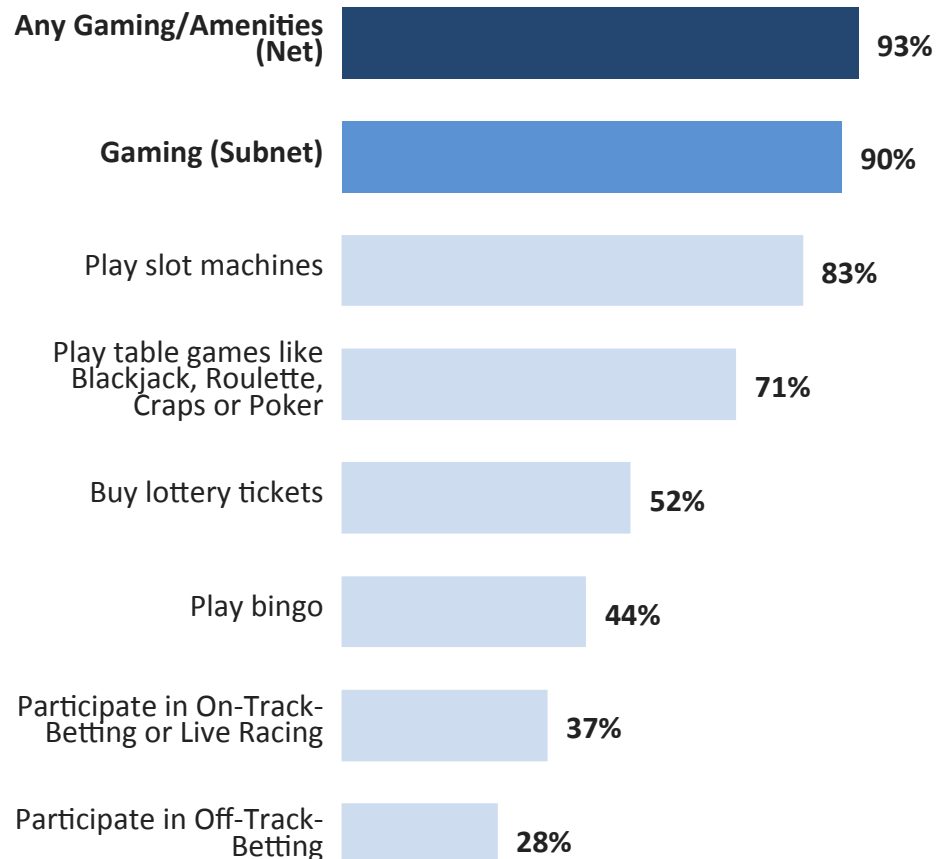
8:1 going out to a movie weekly.



CASINO ATTITUDES AND PARTICIPATION

Activity Participation Awareness

Total



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
98% B	90%	89%	90%	99% F	96%	99% H	94%
97% B	86%	83%	87%	96%	94%	98% H	92%
89% B	79%	77%	80%	86%	86%	91% H	81%
75% B	69%	65%	71% C	76%	77%	75%	76%
62% B	45%	47%	45%	68% F	56%	65% H	49%
50% B	41%	46% D	39%	54%	48%	49%	54%
41% B	35%	29%	38% C	46%	42%	42%	35%
30%	28%	21%	30% C	41% F	32%	32% H	22%

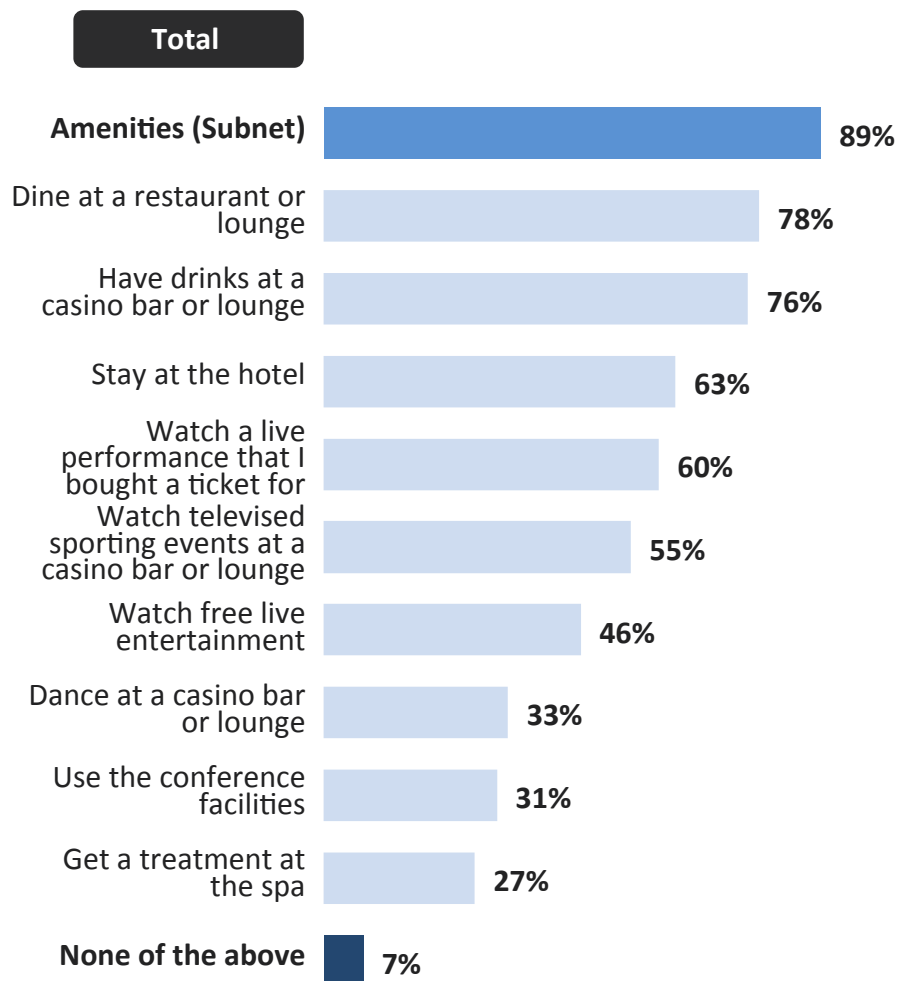
Base: All respondents (n=2,001)

A2. Which of the following activities are you aware of that you can participate in at a casino/community gaming centre in the province where you live.

ABCDEFHG Significantly higher than other subgroup.

CASINO ATTITUDES AND PARTICIPATION

Activity Participation Awareness (continued)



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
95% B	86%	86%	85%	96% F	90%	96% H	89%
83% B	74%	69%	76% C	78%	81%	84%	79%
81% B	74%	73%	74%	77%	81%	81%	80%
66% B	61%	62%	60%	67%	67%	66%	67%
62%	59%	54%	60%	61%	64%	62%	62%
60% B	52%	52%	52%	67%	63%	61%	57%
55% B	40%	41%	40%	52%	52%	56%	51%
34%	32%	35%	31%	37%	36%	36%	29%
30%	31%	26%	34% C	32%	35%	30%	31%
29%	26%	29%	25%	31%	27%	29%	28%
2%	10% A	11%	10%	1%	4% E	1%	6% G

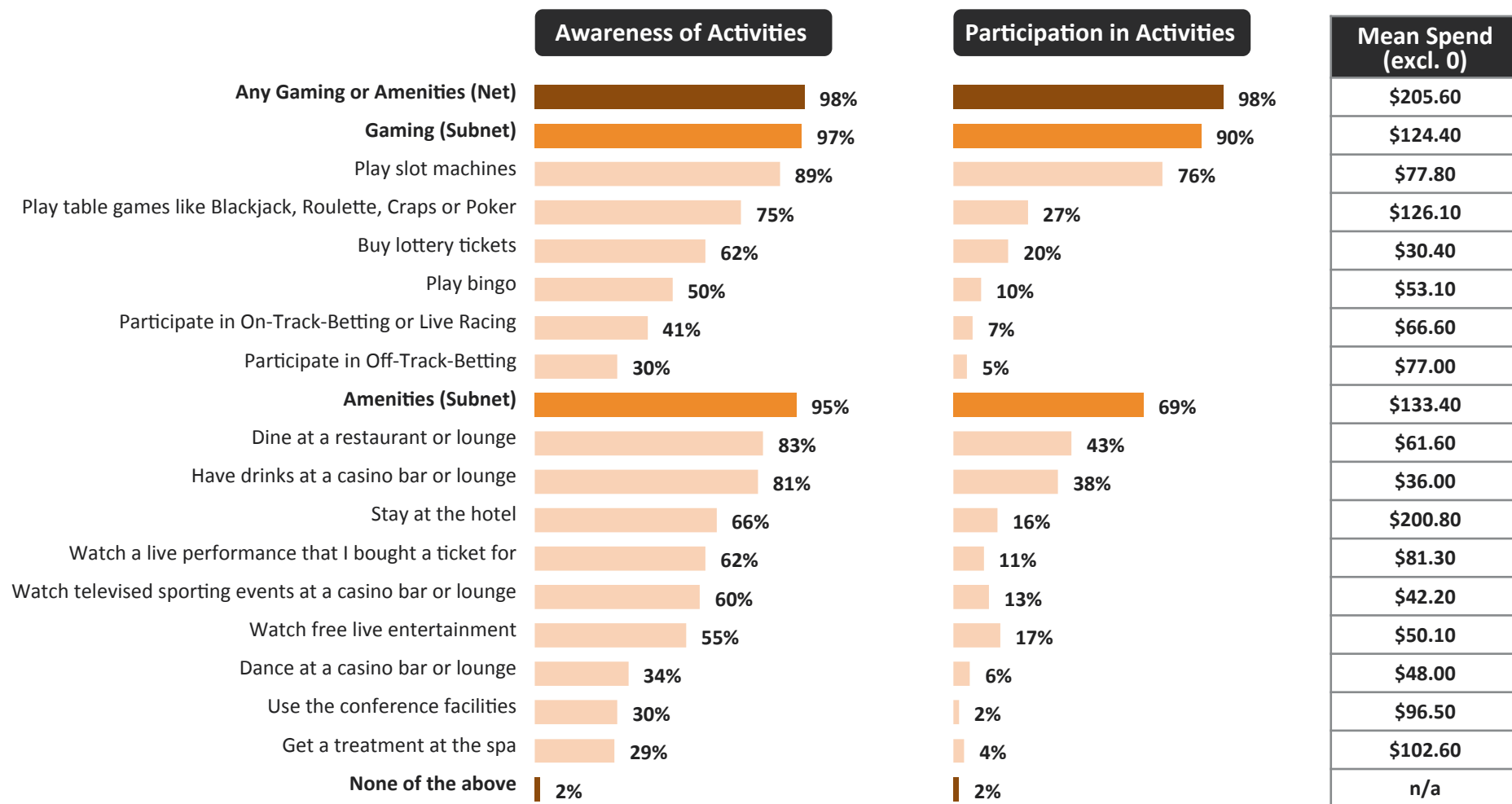
Base: All respondents (n=2,001)

A2. Which of the following activities are you aware of that you can participate in at a casino/community gaming centre in the province where you live.

ABCDEF GH Significantly higher than other subgroup.

CASINO ATTITUDES AND PARTICIPATION

Activity Participation – Casino Visitors



Base: Casino Visitors (n=746)

A2. Which of the following activities are you aware of that you can participate in at a casino/community gaming centre in the province where you live.

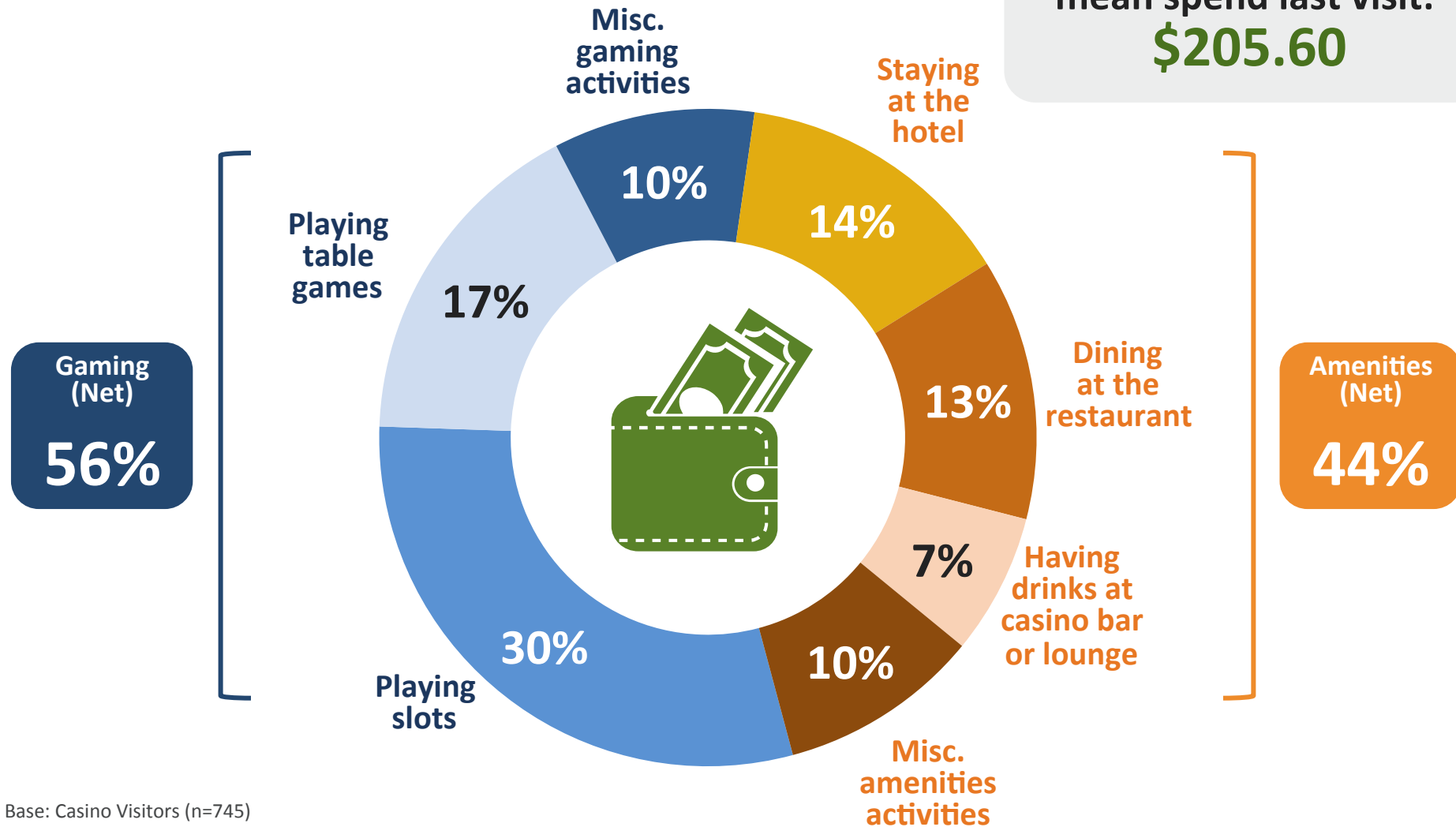
A3. Which of the following did you do during your most recent visit to a casino/community gaming centre in the province where you live?

A4a. During your most recent visit to a casino/community gaming centre in the province where you live, please indicate how much money you spent (not including your winnings) on the following.

CASINO ATTITUDES AND PARTICIPATION

Share of Spend Summary

Any Gaming or Amenities
mean spend last visit:
\$205.60



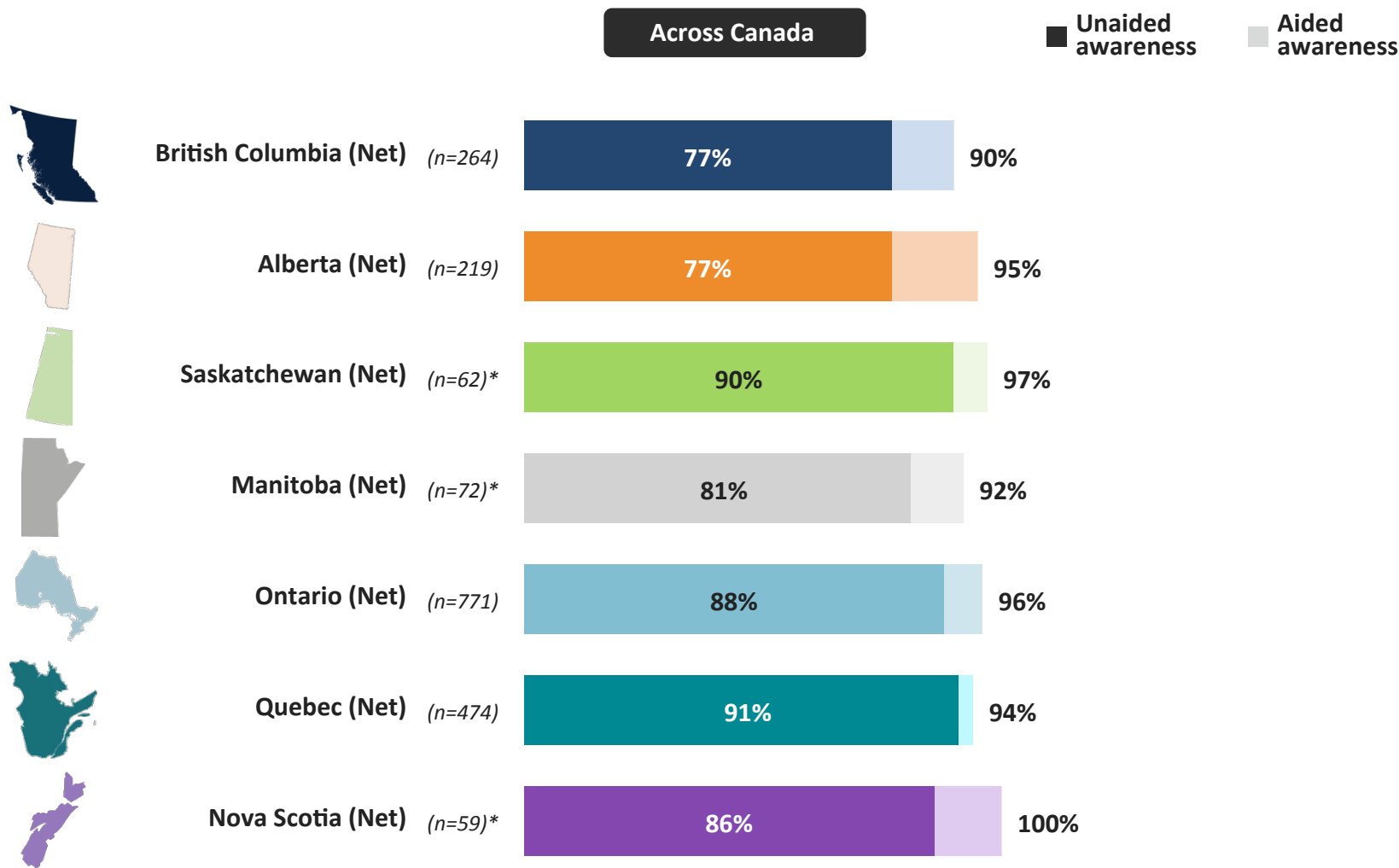
Base: Casino Visitors (n=745)

A4a. During your most recent visit to a casino/community gaming centre in the province where you live, please indicate how much money you spent (not including your winnings) on the following.

A4b. During your most recent visit to a casino/community gaming centre in the province where you live, please indicate how much money you spent (not including your winnings) on the following.

CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness by Province



Base: Respondents from [INSERT PROVINCE]

* Small base size, interpret with caution.

A5. Which casino/community gaming centres are you aware of in the province where you live?

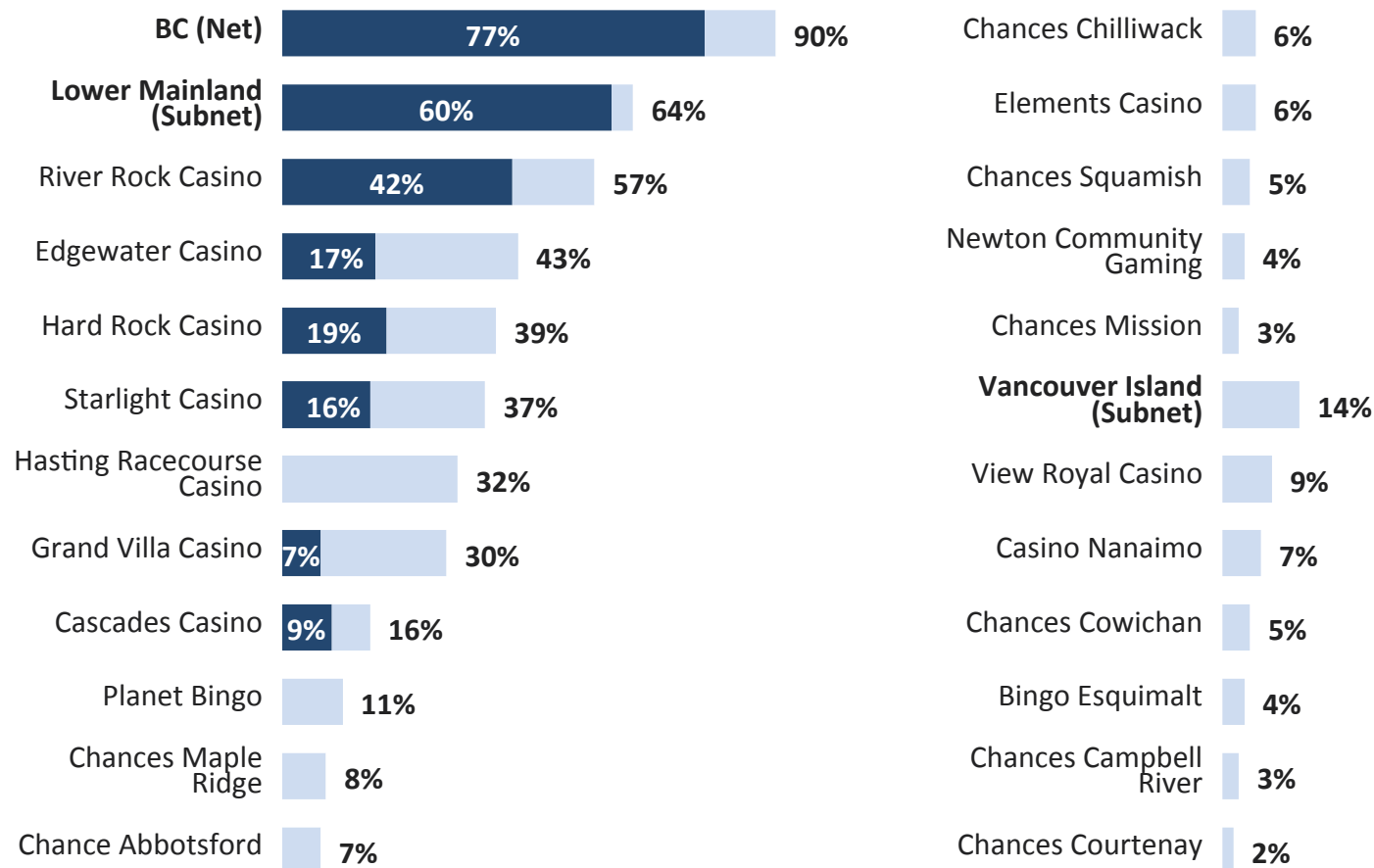
A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness

British Columbia

■ Unaided awareness ■ Aided awareness



Base: British Columbia (n=264)

A5. Which casino/community gaming centres are you aware of in the province where you live?

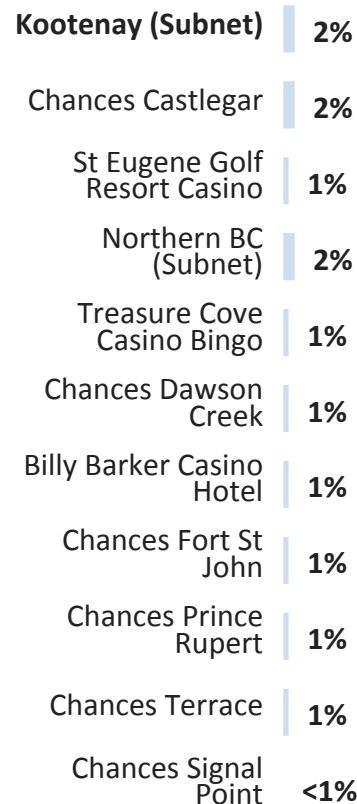
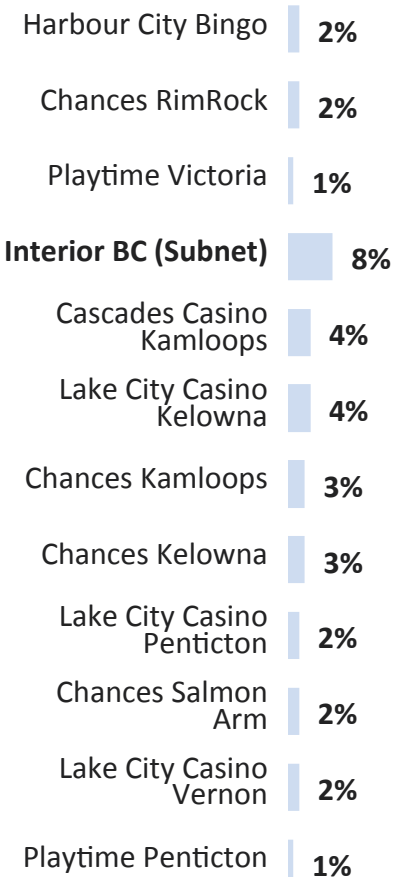
A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness (continued)

British Columbia

■ Unaided awareness ■ Aided awareness



Base: British Columbia (n=264)

A5. Which casino/community gaming centres are you aware of in the province where you live?

A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

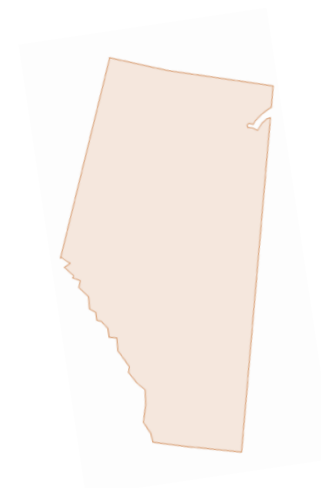
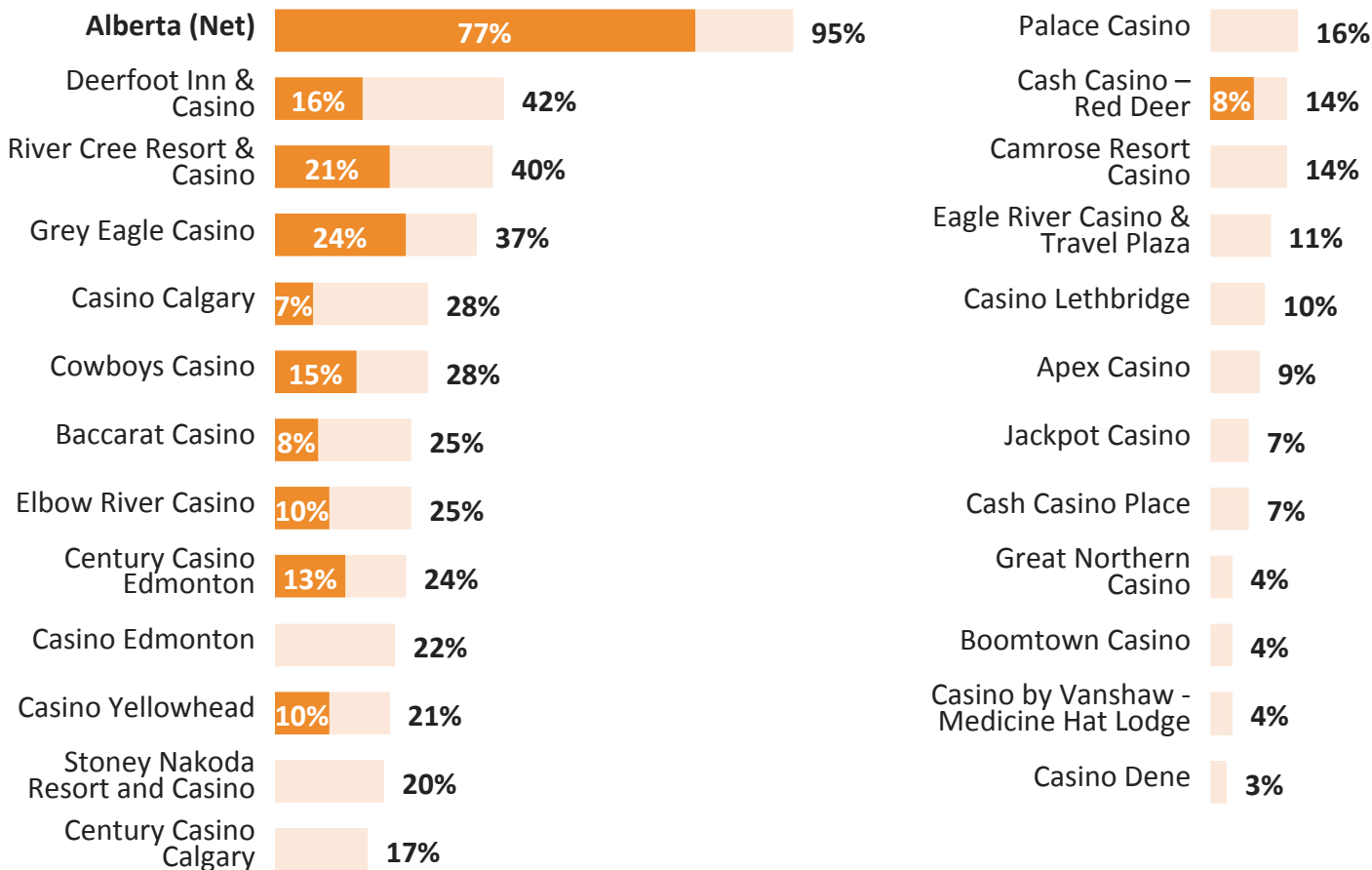
CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness (continued)

Alberta

Unaided awareness

Aided awareness



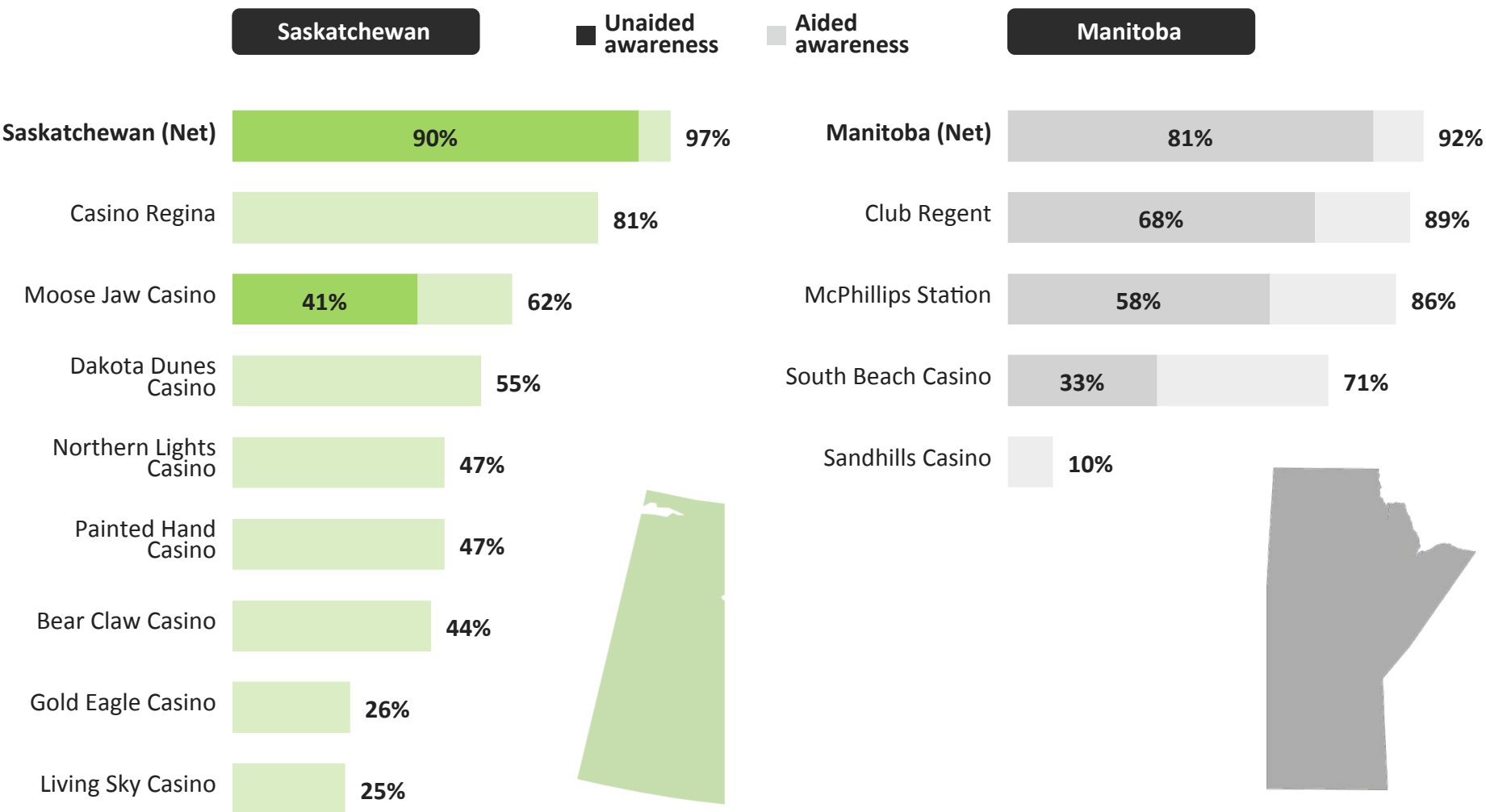
Base: Alberta (n=219)

A5. Which casino/community gaming centres are you aware of in the province where you live?

A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness (continued)



Base: Saskatchewan (n=62)* * Small base size, interpret with caution.

Base: Manitoba (n=72)*

A5. Which casino/community gaming centres are you aware of in the province where you live?

A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness (continued)

Ontario

■ **Unaided awareness**

■ **Aided awareness**

Ontario (Net) 88% 96%

Casino Rama 47% 74%

Fallsview Casino Resort 52% 70%

Niagara Casino 65%

Woodbine Racetrack 22% 61%

Mohawk Racetrack 8% 40%

Caesars Windsor 12% 30%

Flamboro Downs 4% 29%

Great Blue Heron Casino 8% 23%

Georgian Downs 4% 21%

Kawartha Downs 3% 21%

Brantford Casino 4% 18%

Ajax Downs 3% 17%

Rideau Carleton Raceway 7% 16%

Western Fair 3% 15%

Sault Ste Marie Casino 11%

Sudbury Downs 10%

Grand River Raceway 8%

Woodstock Raceway 8%

Thunder Bay Casino 6%

Clinton Raceway 6%

Hanover Raceway 6%

Dresden Raceway 5%

Point Edward Casino 4%

Shorelines Casino 2%



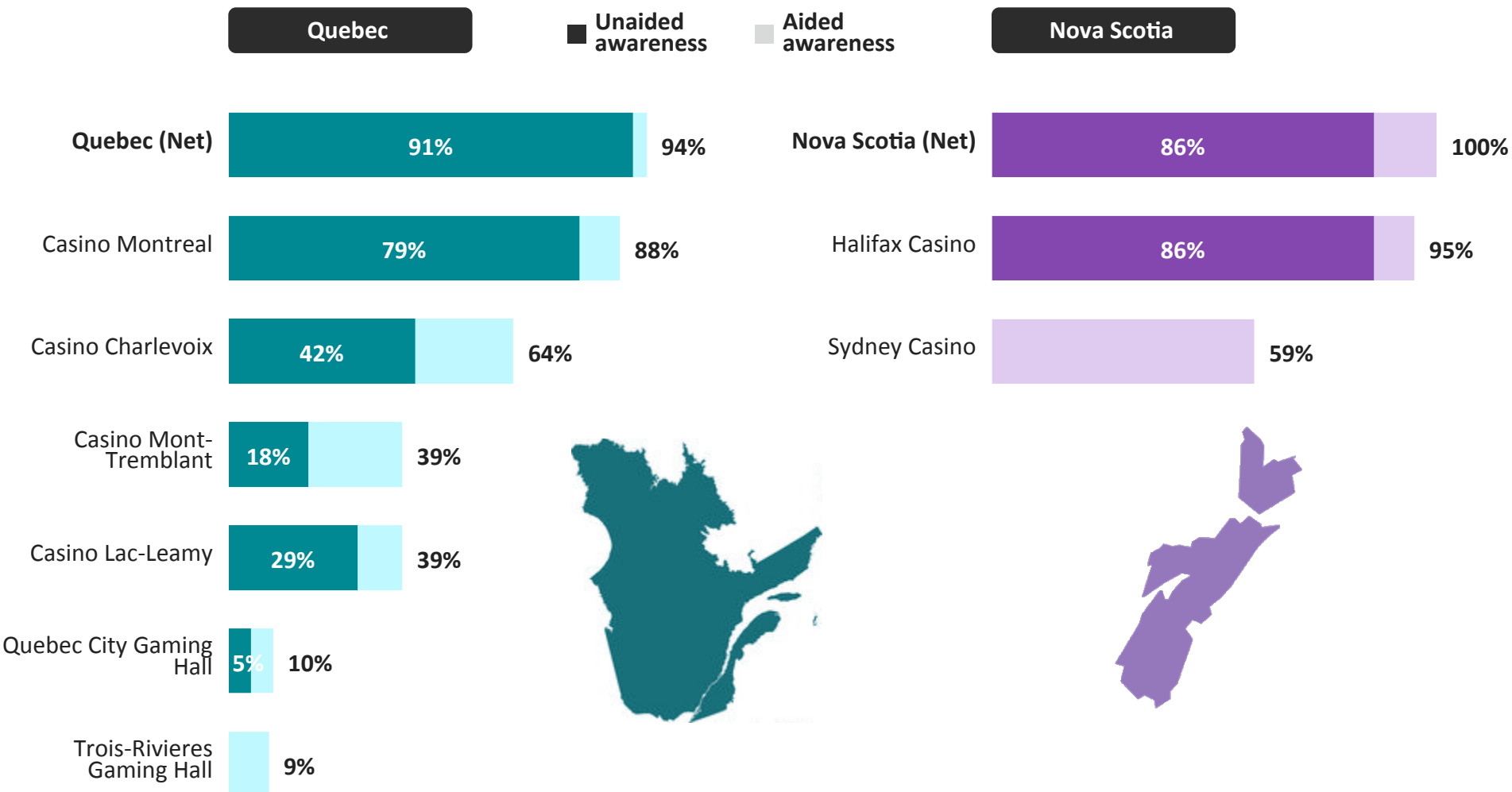
Base: Ontario (n=771)

A5. Which casino/community gaming centres are you aware of in the province where you live?

A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

CASINO ATTITUDES AND PARTICIPATION

Casino/CGC Unaided/Aided Awareness (continued)



Base: Quebec (n=474)

* Small base size, interpret with caution.

Base: Nova Scotia (n=59)*

A5. Which casino/community gaming centres are you aware of in the province where you live?

A6a. Which casino/community gaming centres are you aware of in the province where you live, including those that you may have already mentioned?

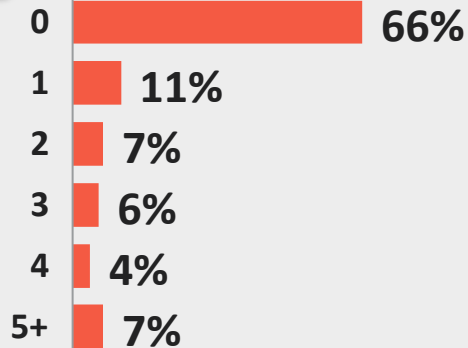
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness – Poor

12 Amenities

of Amenities aware of:

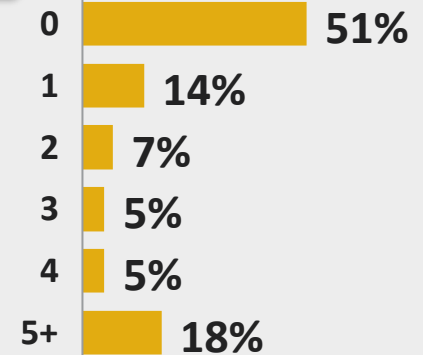
Casino Rama
(n=506)



19 Amenities

of Amenities aware of:

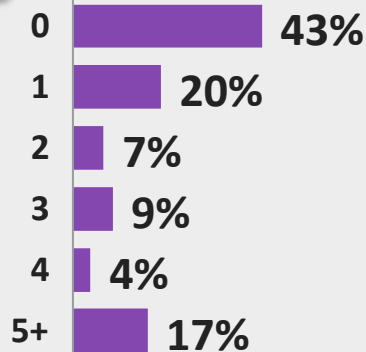
Caesars Windsor
(n=164)



8 Amenities

of Amenities aware of:

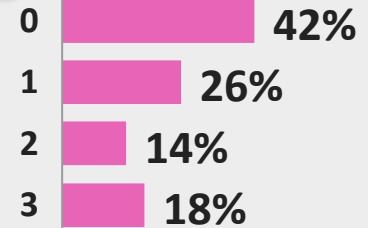
Hard Rock Casino
(n=102)



3 Amenities

of Amenities aware of:

Club Regent
(n=64)*



Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

Base: Aware of casino

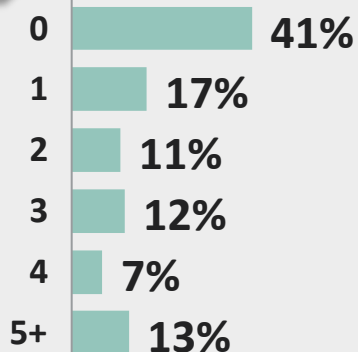
A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness - Struggling

15 Amenities

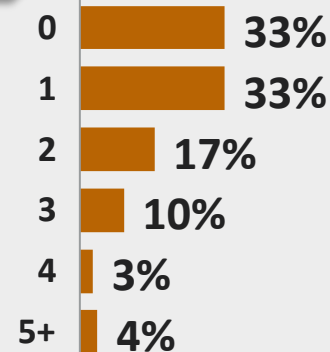
of Amenities aware of:



**Fallsview
Casino
Resort**
(n=489)

8 Amenities

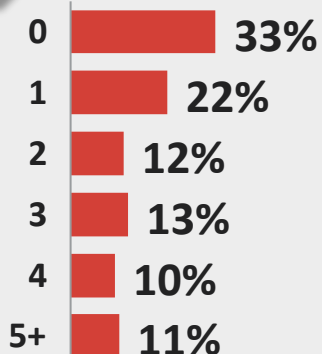
of Amenities aware of:



**Casino
Montreal**
(n=416)

10 Amenities

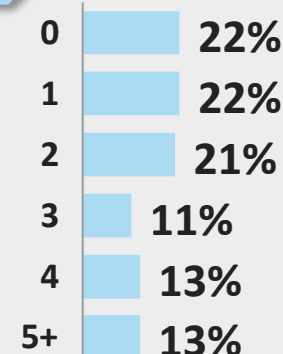
of Amenities aware of:



**Casino
Lac-Leamy**
(n=182)

6 Amenities

of Amenities aware of:



**River Cree
Resort &
Casino**
(n=88)*

Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

Base: Aware of casino

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

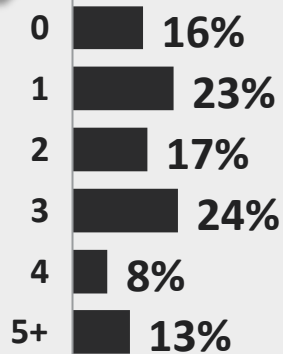
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness – Doing Much Better

6 Amenities

of Amenities aware of:

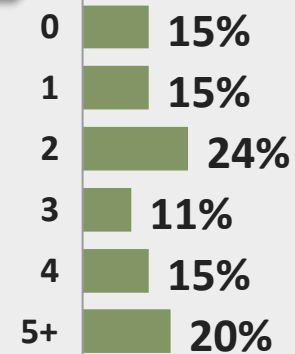
**Grey
Eagle
Casino**
(n=81)*



9 Amenities

of Amenities aware of:

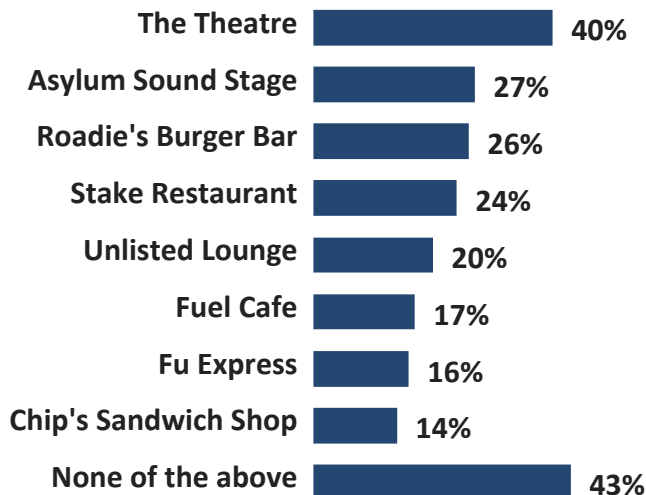
**River Rock
Casino**
(n=151)



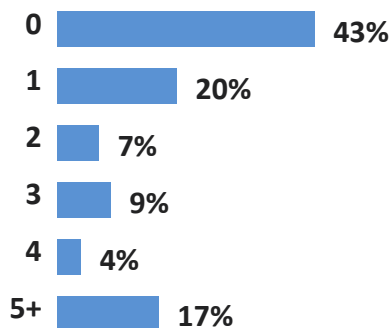
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness

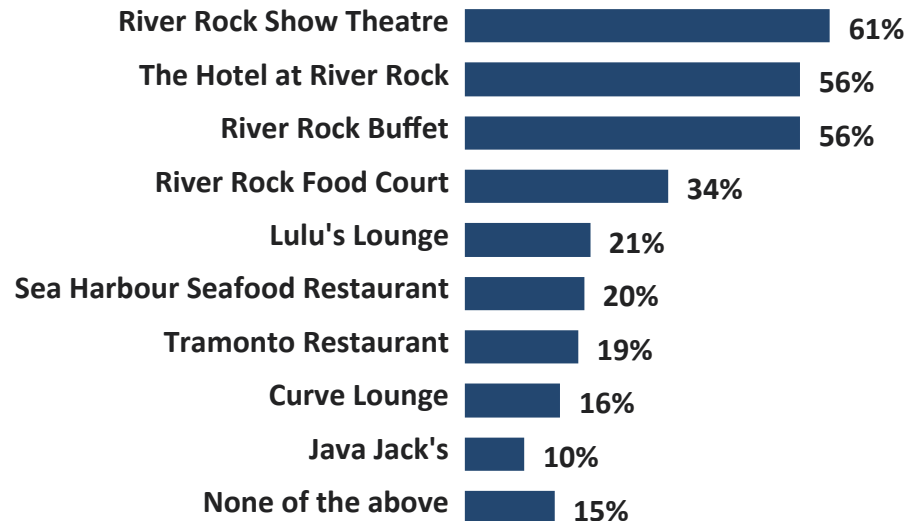
**Hard Rock Casino
(n=102)**



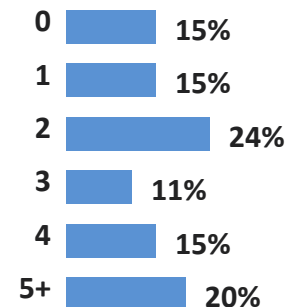
**# of Amenities
aware of**



**River Rock Casino
(n=151)**



**# of Amenities
aware of**



Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

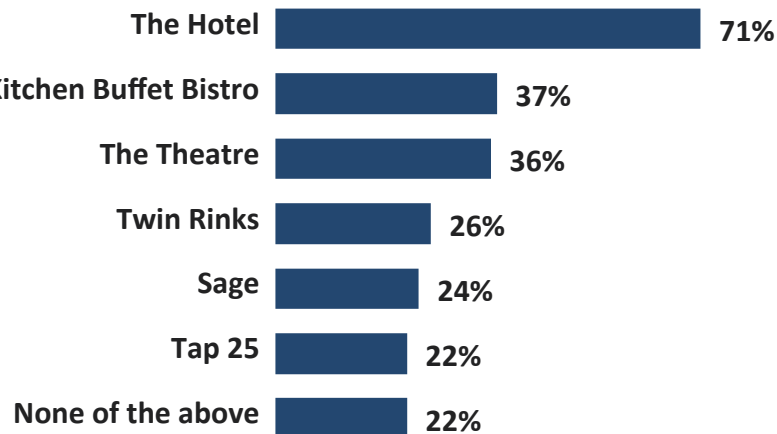
Base: Aware of casino

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

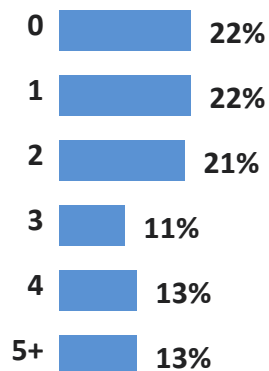
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness (continued)

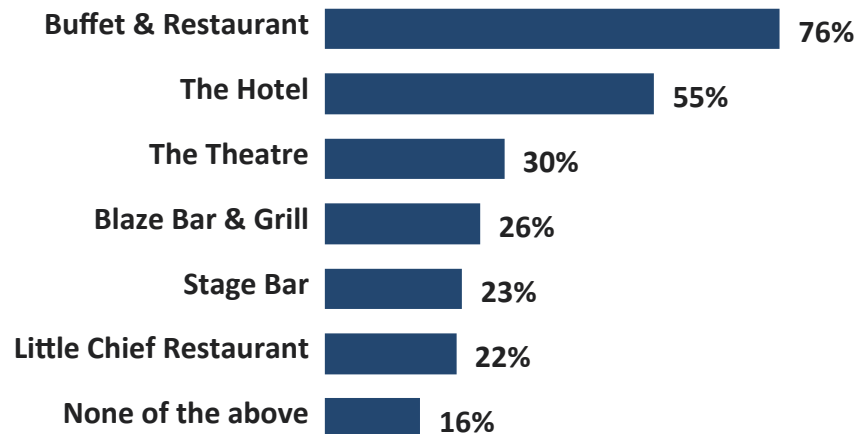
River Cree Resort & Casino
(n=88)*



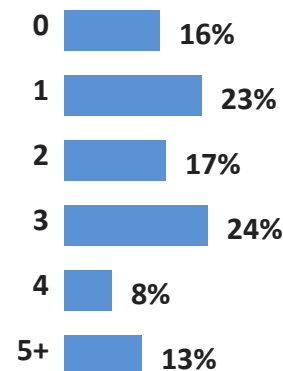
of Amenities
aware of



Grey Eagle Casino
(n=81)*



of Amenities
aware of



Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

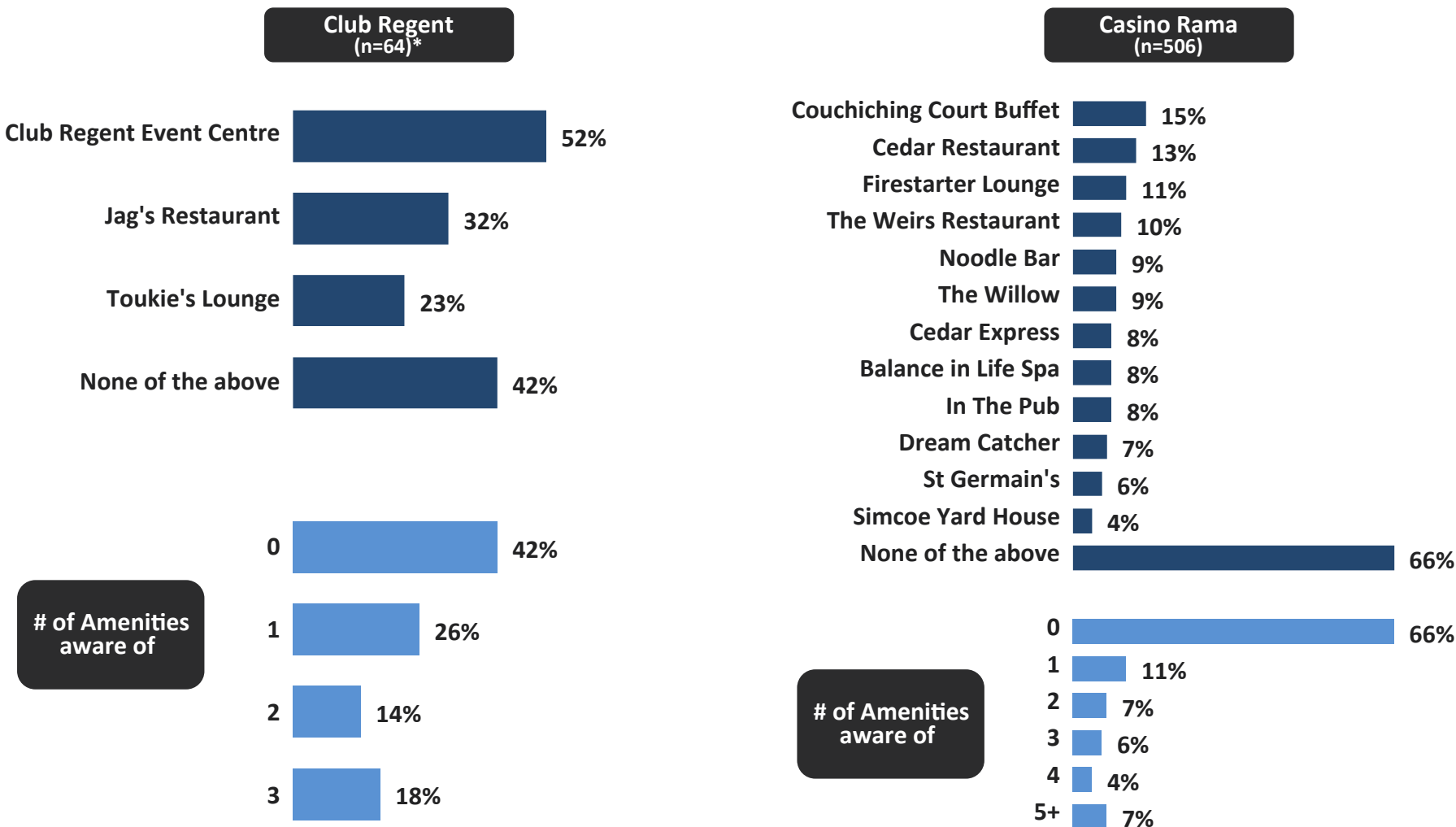
Base: Aware of casino

* Small base size, interpret with caution.

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness (continued)



Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

Base: Aware of casino

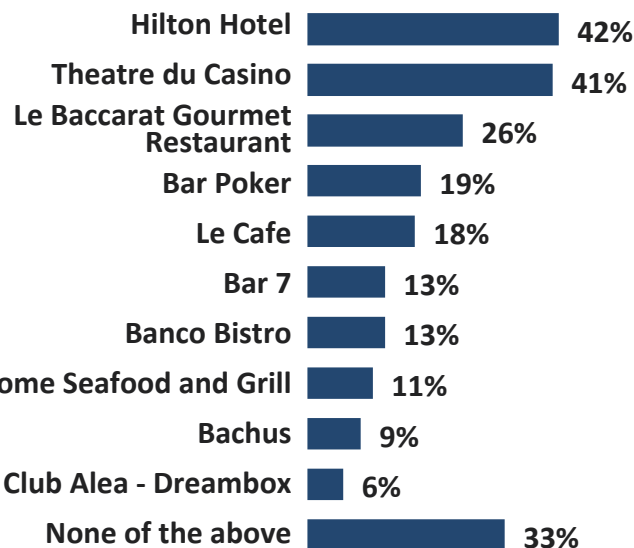
* Small base size, interpret with caution.

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

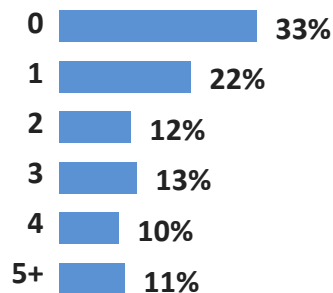
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness (continued)

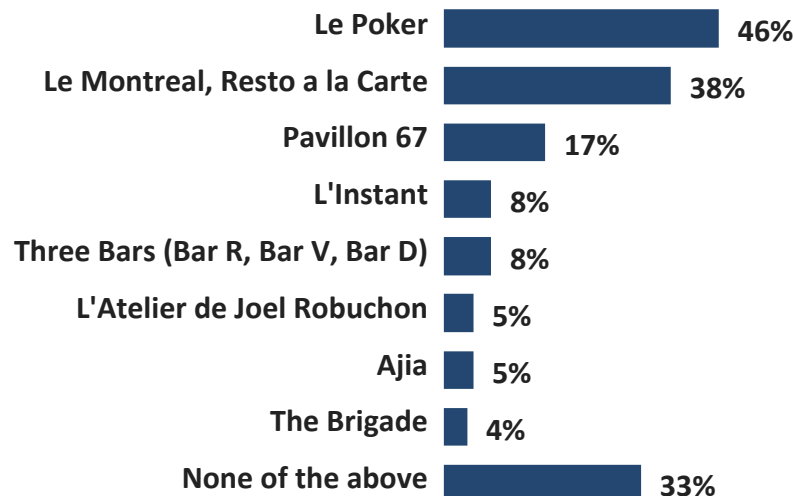
Casino Lac-Leamy
(n=182)



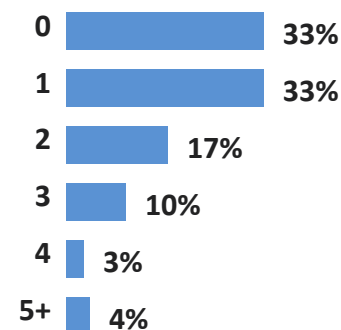
of Amenities
aware of



Casino Montreal
(n=416)



of Amenities
aware of



Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

Base: Aware of casino

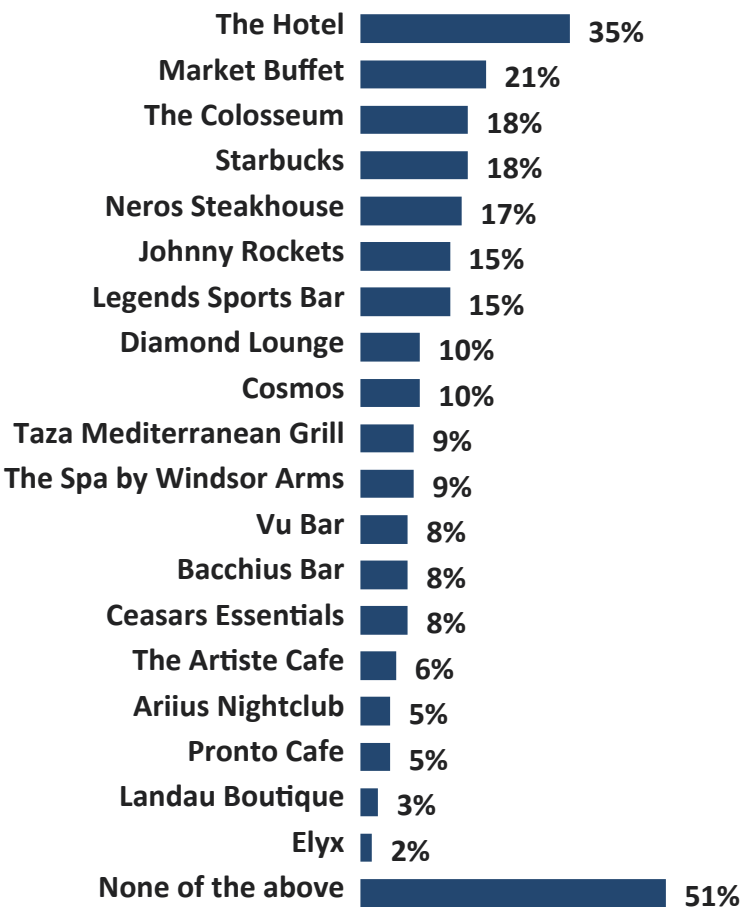
* Small base size, interpret with caution.

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

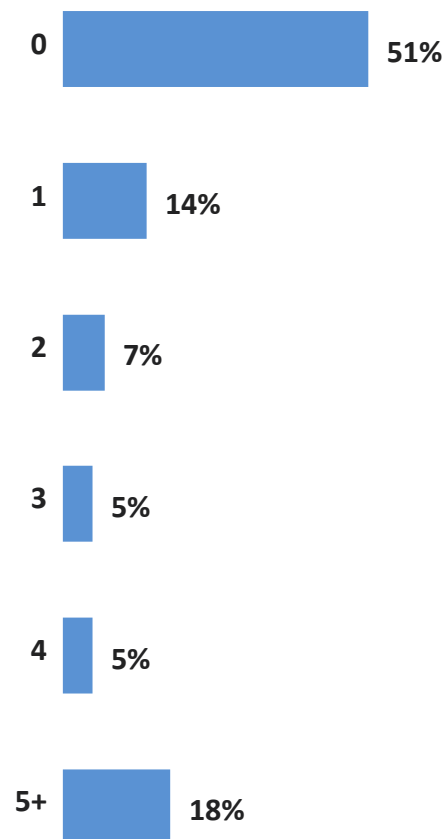
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness (continued)

Caesars Windsor
(n=164)



of Amenities
aware of



Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

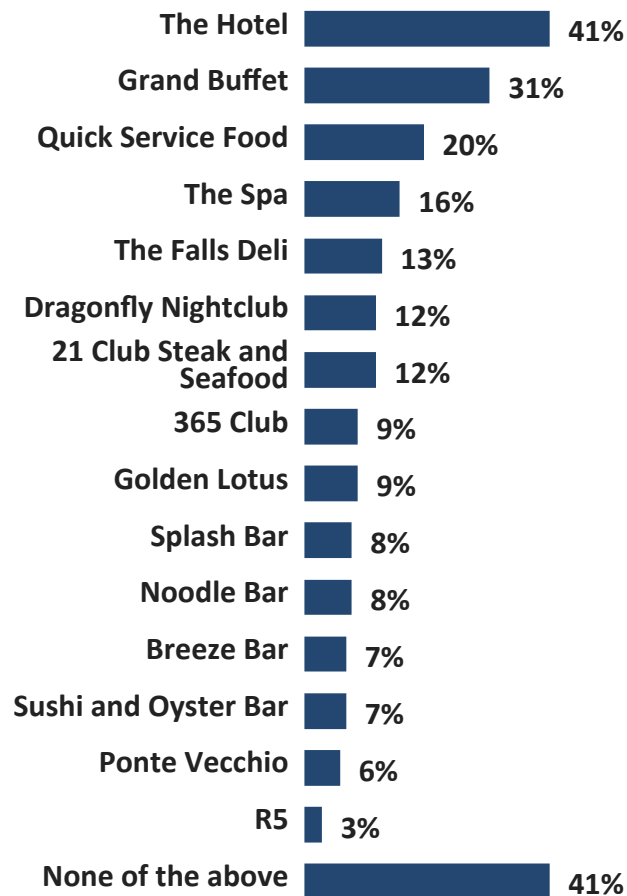
Base: Aware of casino

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

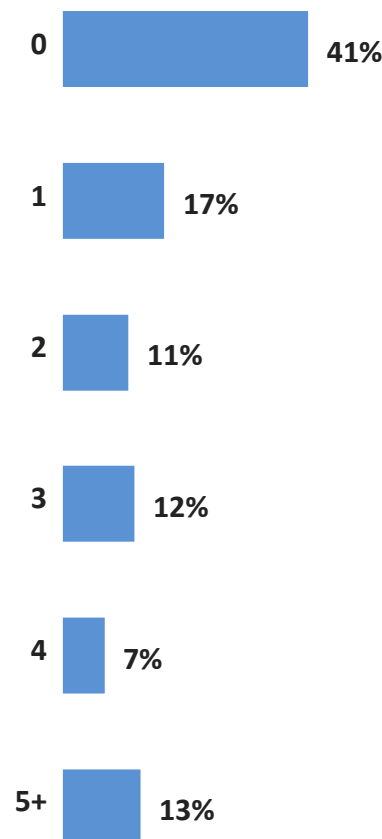
CASINO ATTITUDES AND PARTICIPATION

Amenities/Facilities Awareness (continued)

Fallsview Casino Resort
(n=489)



of Amenities
aware of



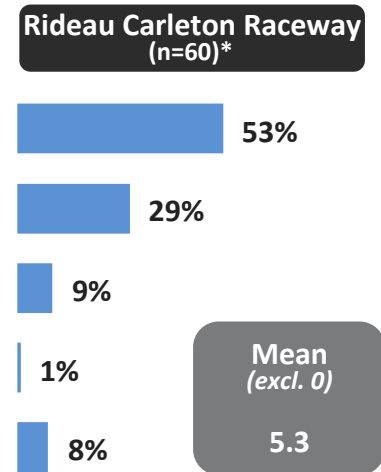
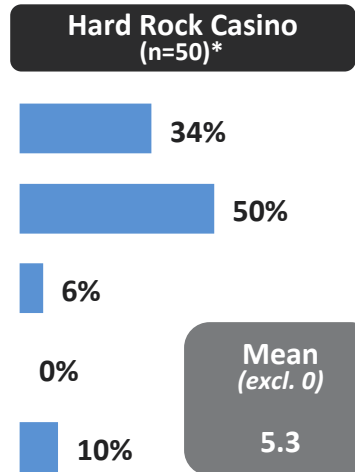
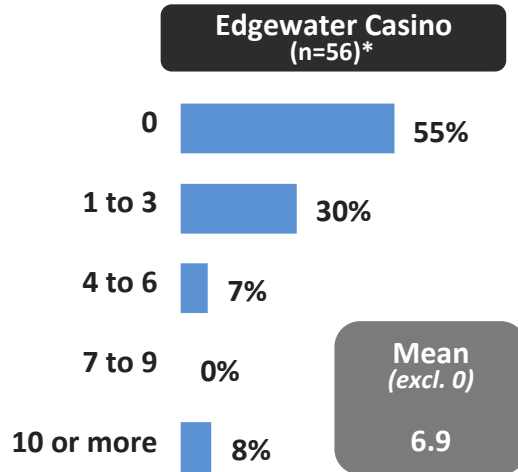
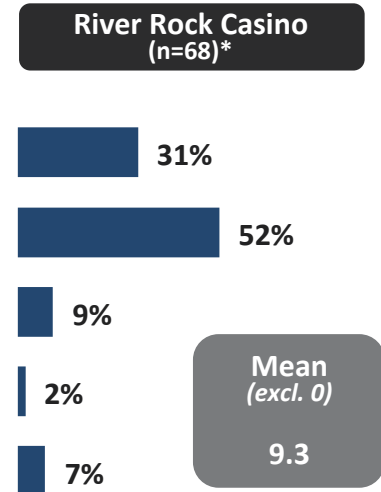
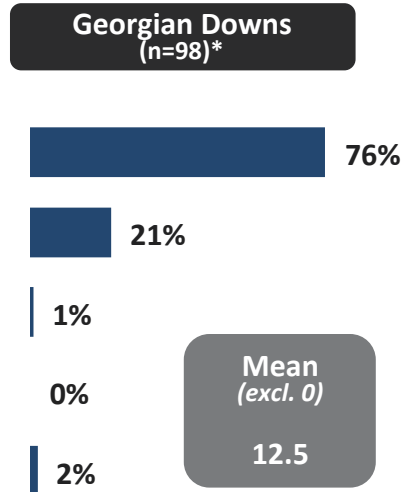
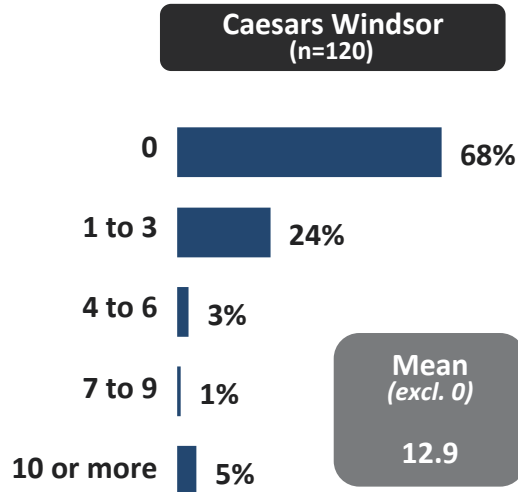
Note: Cascades Casino Kamloops and Casino Moncton not shown due to small base size (n<50).

Base: Aware of casino

A6b. Which of the following amenities or facilities offered at [PIPE IN CASINO FROM A6a] are you aware of?

CASINO ATTITUDES AND PARTICIPATION

Past Year Casino/CGC Visitation



Note: Casinos with (n<50) not shown.

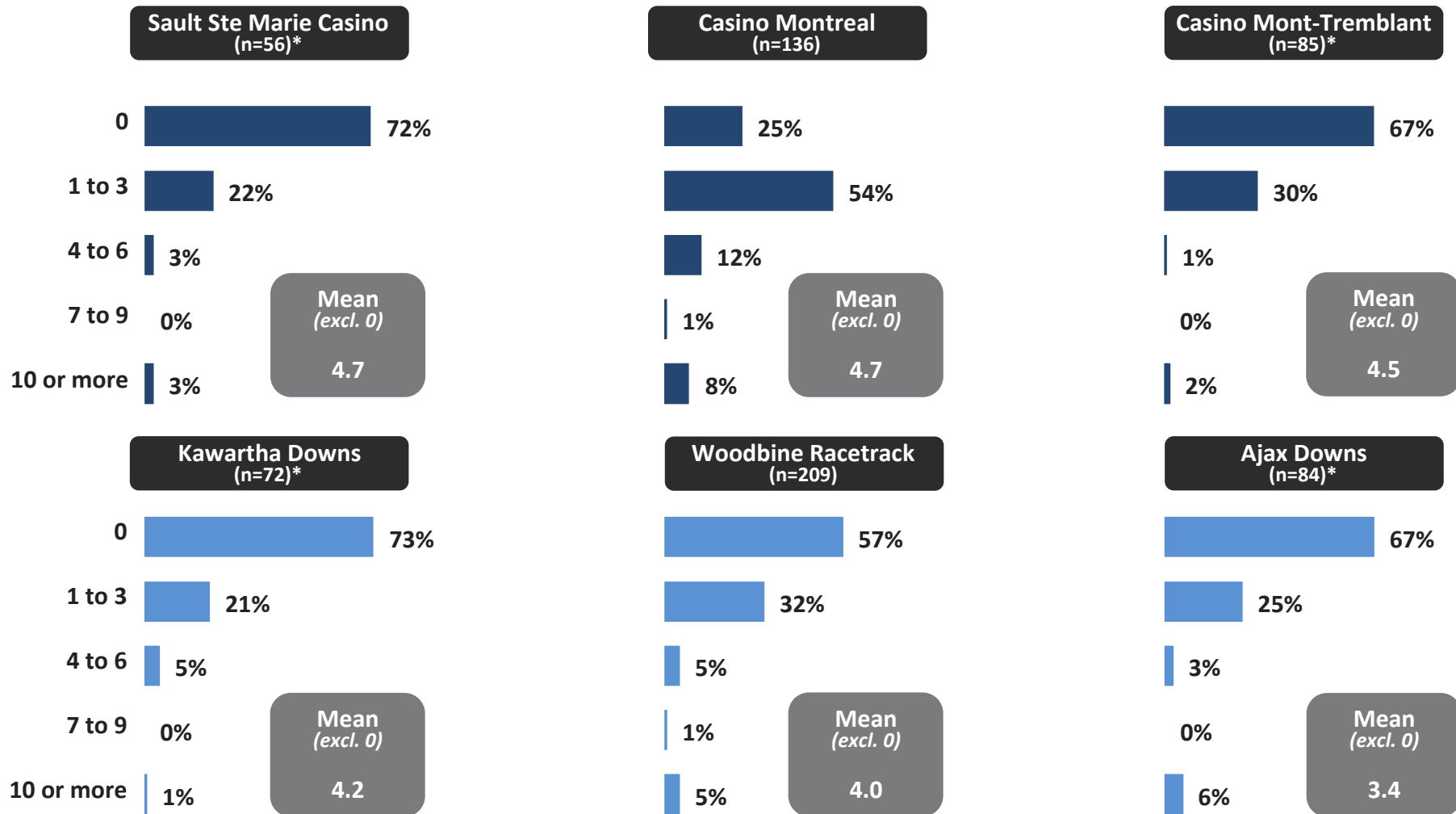
Base: Lives in region/Aware of [INSERT CASINO] and has visited casinos in past year

* Small base size, interpret with caution.

A7. In the past year, how many times did you visit each of the following casino/community gaming centres in the province where you live?

CASINO ATTITUDES AND PARTICIPATION

Past Year Casino/CGC Visitation (continued)



Note: Casinos with (n<50) not shown.

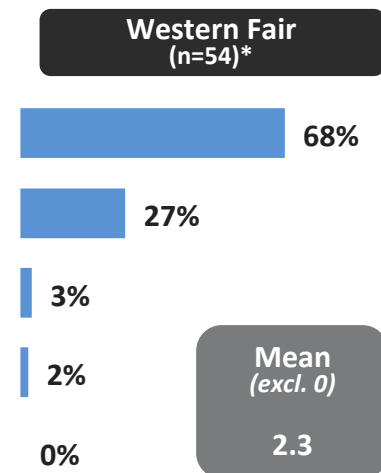
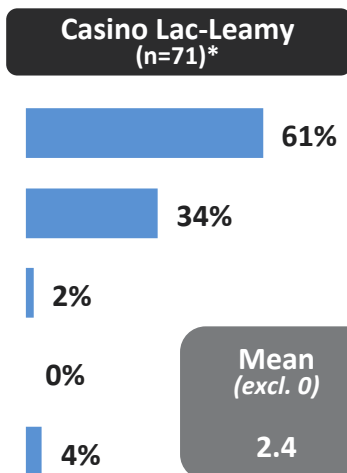
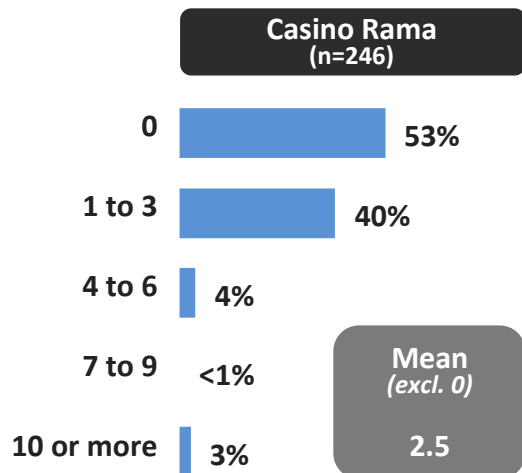
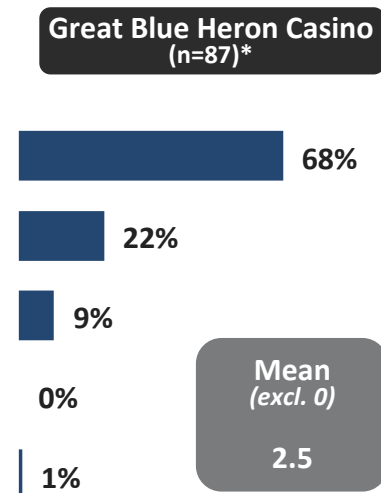
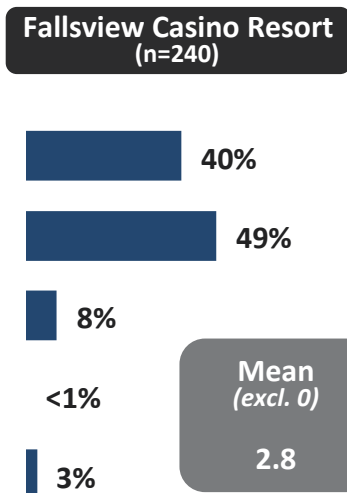
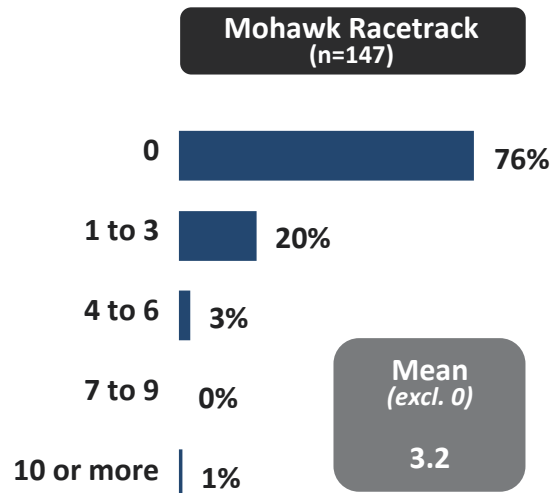
Base: Lives in region/Aware of [INSERT CASINO] and has visited casinos in past year

* Small base size, interpret with caution.

A7. In the past year, how many times did you visit each of the following casino/community gaming centres in the province where you live?

CASINO ATTITUDES AND PARTICIPATION

Past Year Casino/CGC Visitation (continued)



Note: Casinos with (n<50) not shown.

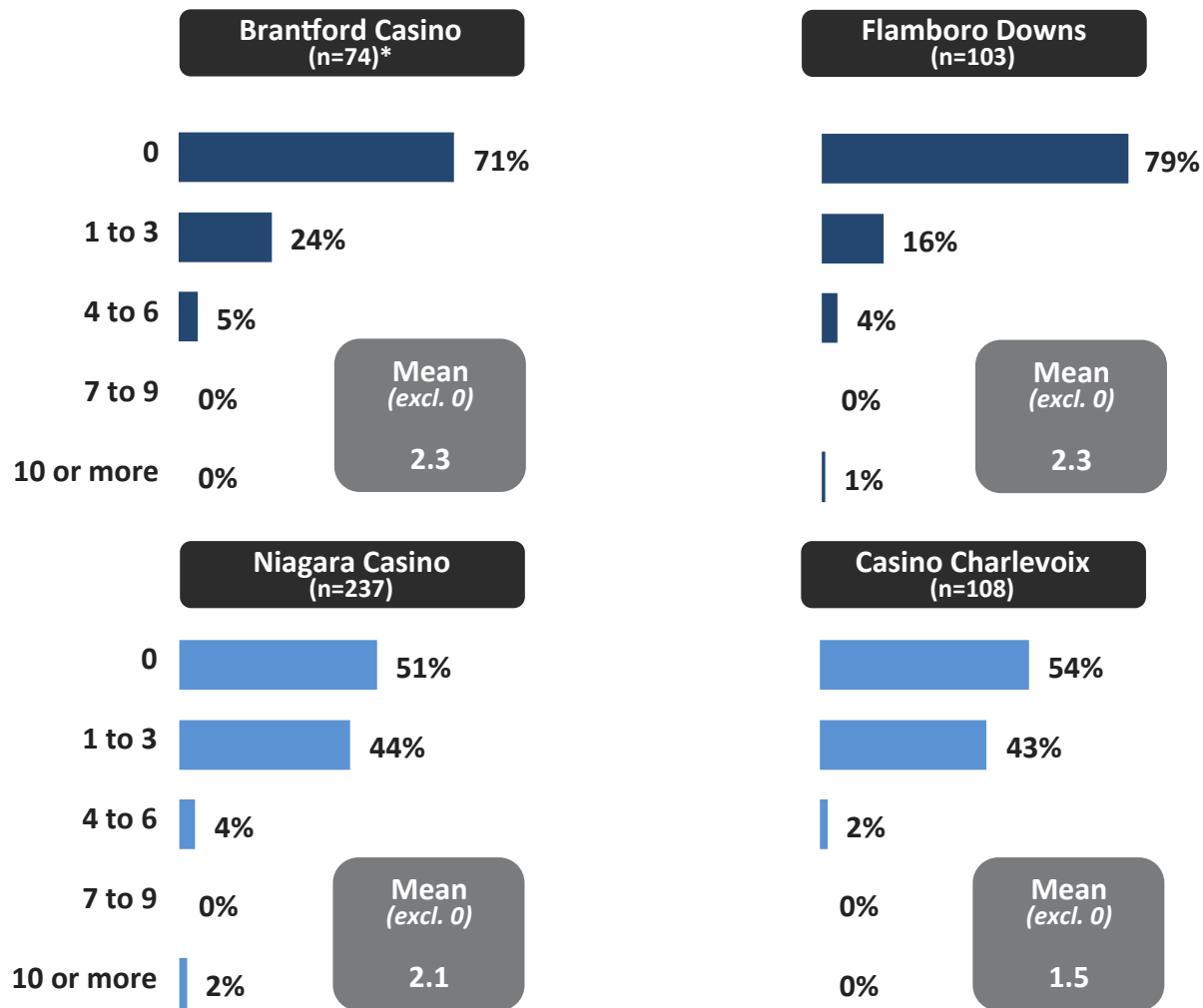
Base: Lives in region/Aware of [INSERT CASINO] and has visited casinos in past year

* Small base size, interpret with caution.

A7. In the past year, how many times did you visit each of the following casino/community gaming centres in the province where you live?

CASINO ATTITUDES AND PARTICIPATION

Past Year Casino/CGC Visitation (continued)



Note: Casinos with (n<50) not shown.

Base: Lives in region/Aware of [INSERT CASINO] and has visited casinos in past year

* Small base size, interpret with caution.

A7. In the past year, how many times did you visit each of the following casino/community gaming centres in the province where you live?

Typical Game Participation by Weekly Casino/CGC Visitors

Slots



Casino Visitors:

Core – 9%
Moderate – 19%



18-34 years:

Core – 9%
Moderate – 17%



35+ years:

Core – 9%
Moderate – 20%

Table Games



Casino Visitors:

Core – 4%
Moderate – 11%



18-34 years:

Core – 7%
Moderate – 16%



35+ years:

Core – 2%
Moderate – 9%

Electronic Table Games



Casino Visitors:

Core – 5%
Moderate – 9%



18-34 years:

Core – 8%
Moderate – 13%



35+ years:

Core – 3%
Moderate – 7%

Poker



Casino Visitors:

Core – 4%
Moderate – 8%



18-34 years:

Core – 5%
Moderate – 13%



35+ years:

Core – 3%
Moderate – 6%

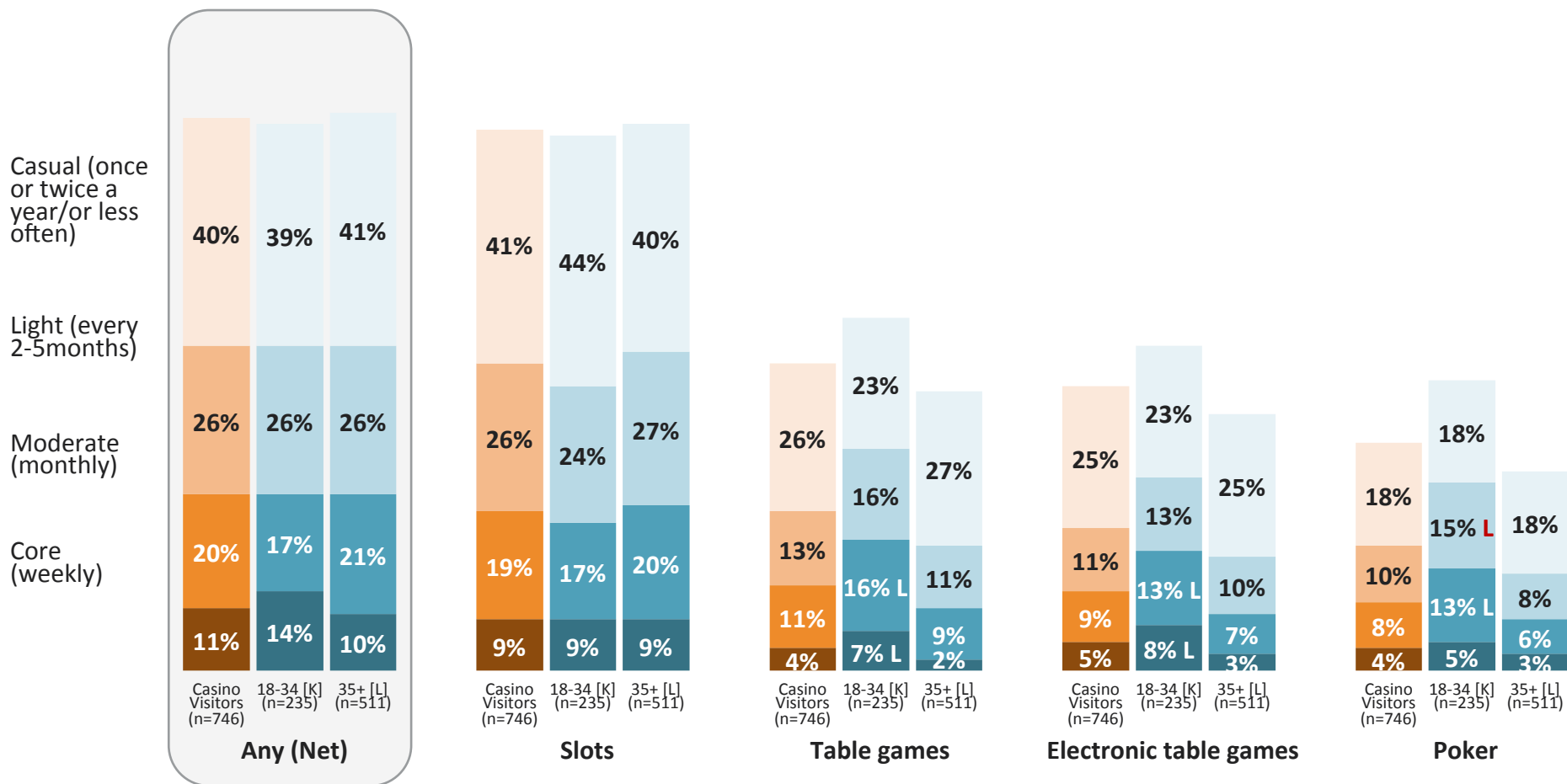
Base: Casino Visitors

A8. How often do you typically play each of these games at a casino/community gaming centres in the province where you live?

CASINO ATTITUDES AND PARTICIPATION

Typical Game Participation

Casino Visitors



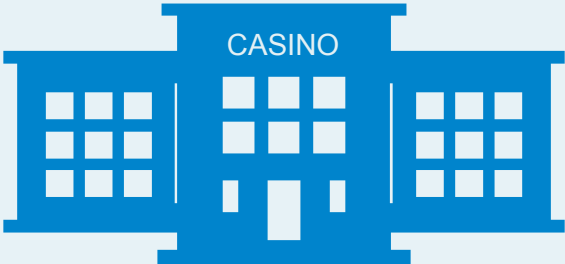
Base: Casino Visitors

A8. How often do you typically play each of these games at a casino/community gaming centres in the province where you live?

KL Significantly higher than other subgroup.

CASINO ATTITUDES AND PARTICIPATION

Likelihood of Casino/CGC Visitation in the Next Year



49%

Top-3-box rating (rated 8, 9, 10 on 10-point scale) for the likelihood of visiting a casino/ community gaming centre in home province in next 12 months.

68%
Visitors

8%
Non-Visitors

8%
Non-Visitors
18-34

9%
Non-Visitors
35+

76%
Sports
Bettors

61%
Non-Sports
Bettors

77%
Slot
Players

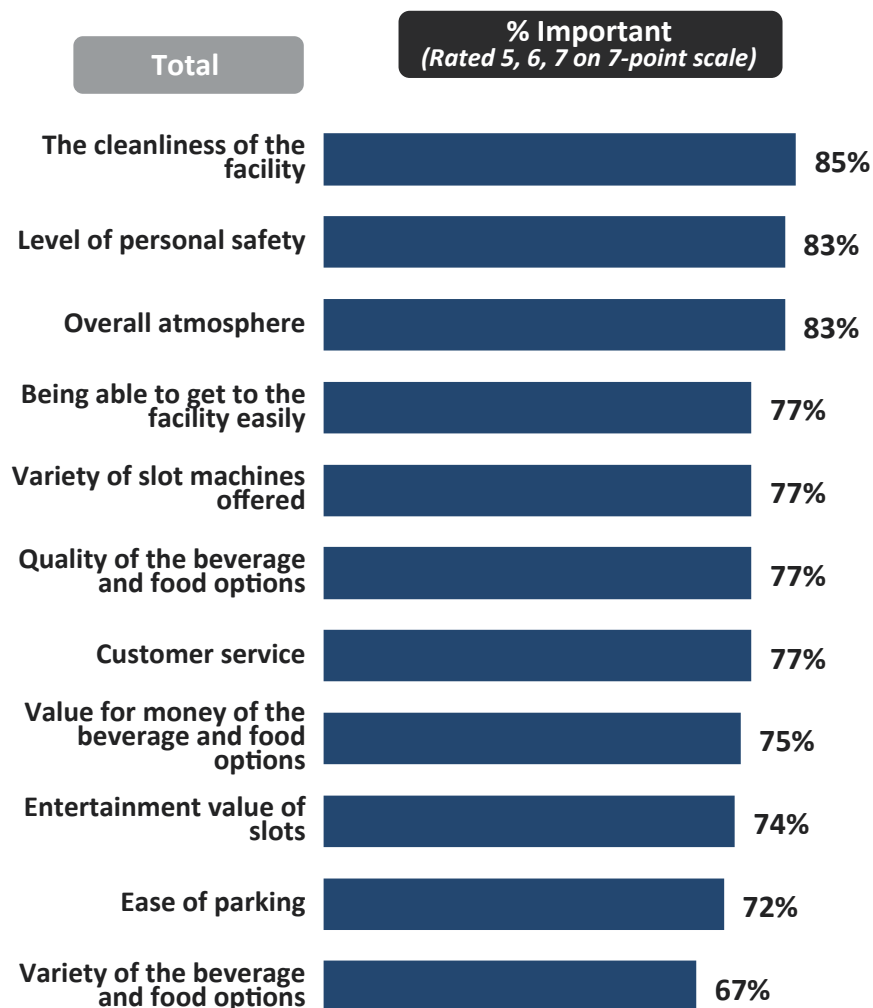
32%
Non-Slot
Players

Base: Visited Casino/CGC in past year (n=1,100)

A9. How likely are you to visit a casino/community gaming centre in the province where you live in the next 12 months?

CASINO ATTITUDES AND PARTICIPATION

Importance When Choosing To Visit Casino/CGCs



Sports Bettors (n=176) [E]	Non-Sports Bettors (n=204) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
80%	89% E	84%	89%
77%	89% E	83%	84%
76%	88% E	83%	82%
78%	79%	78%	71%
70%	85% E	82% H	53%
77%	81%	77%	73%
74%	81%	76%	79%
73%	78%	74%	78%
68%	76%	78% H	54%
69%	79% E	74% H	62%
70%	72%	69%	61%

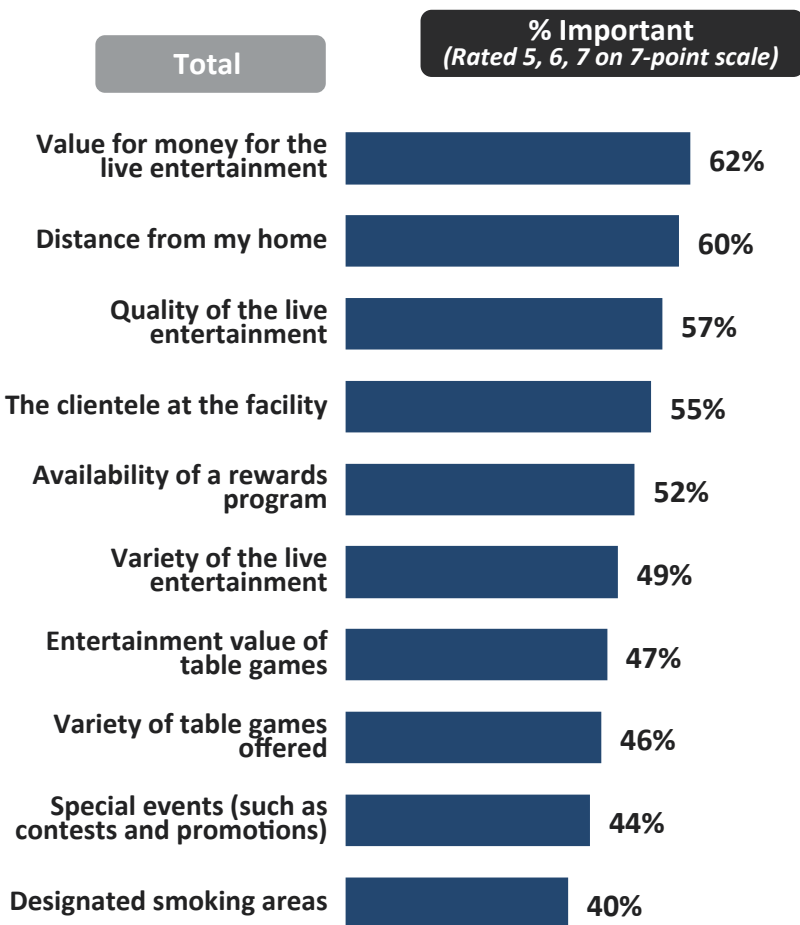
Base: Casino Visitors (n=746)

A10a/A10b. Specifically, how important are the following elements when choosing to visit a casino/community gaming centres in the province where you live?

ABCDEFH Significantly higher than other subgroup.

CASINO ATTITUDES AND PARTICIPATION

Importance When Choosing To Visit Casino/CGCs (continued)



Sports Bettors (n=176) [E]	Non-Sports Bettors (n=204) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
63%	69%	63%	59%
64%	65%	63% H	49%
67%	61%	57%	59%
59%	62%	57%	50%
57%	51%	55% H	40%
54%	58%	49%	48%
68% F	55%	48%	43%
67% F	53%	49% H	38%
46%	49%	45%	38%
42%	39%	40%	41%

Base: Casino Visitors (n=746)

A10a/A10b. Specifically, how important are the following elements when choosing to visit a casino/community gaming centres in the province where you live?

ABCDEF **H** Significantly higher than other subgroup.



SECTION B LOTTERY PARTICIPATION

KEY LEARNINGS



1

Although participation levels varied among regions within Canada, the majority (between 79% to 88%) of Canadians have played lottery games at least once in the past year. ALC Regions (Nova Scotia, New Brunswick and Newfoundland) have the highest proportion of lottery games players with 88% of the population having played in the past 12 months. It is followed by Ontario and BC with 82% having played lottery games in the past year.

2

Among Casino visitors, lottery participation was very high across all regions which suggests there is strong crossover participation. Regions such as Ontario and Quebec showed past year lottery participation skewed towards those 35+ (76% of millennials vs 84% of 35+ in Ontario, and 66% of millennials vs 85% of 35+ in Quebec, respectively).

3

The regions with the highest proportion of past year lottery game participation also had the highest proportion of core and moderate lottery players of any game. Among the 88% of past year lottery players in the ALC region, 70% were core or moderate players. Similarly, among the 82% of past year lottery players in Ontario, 60% were core or moderate players having played in the past month or more frequently.



KEY LEARNINGS CONT.

4

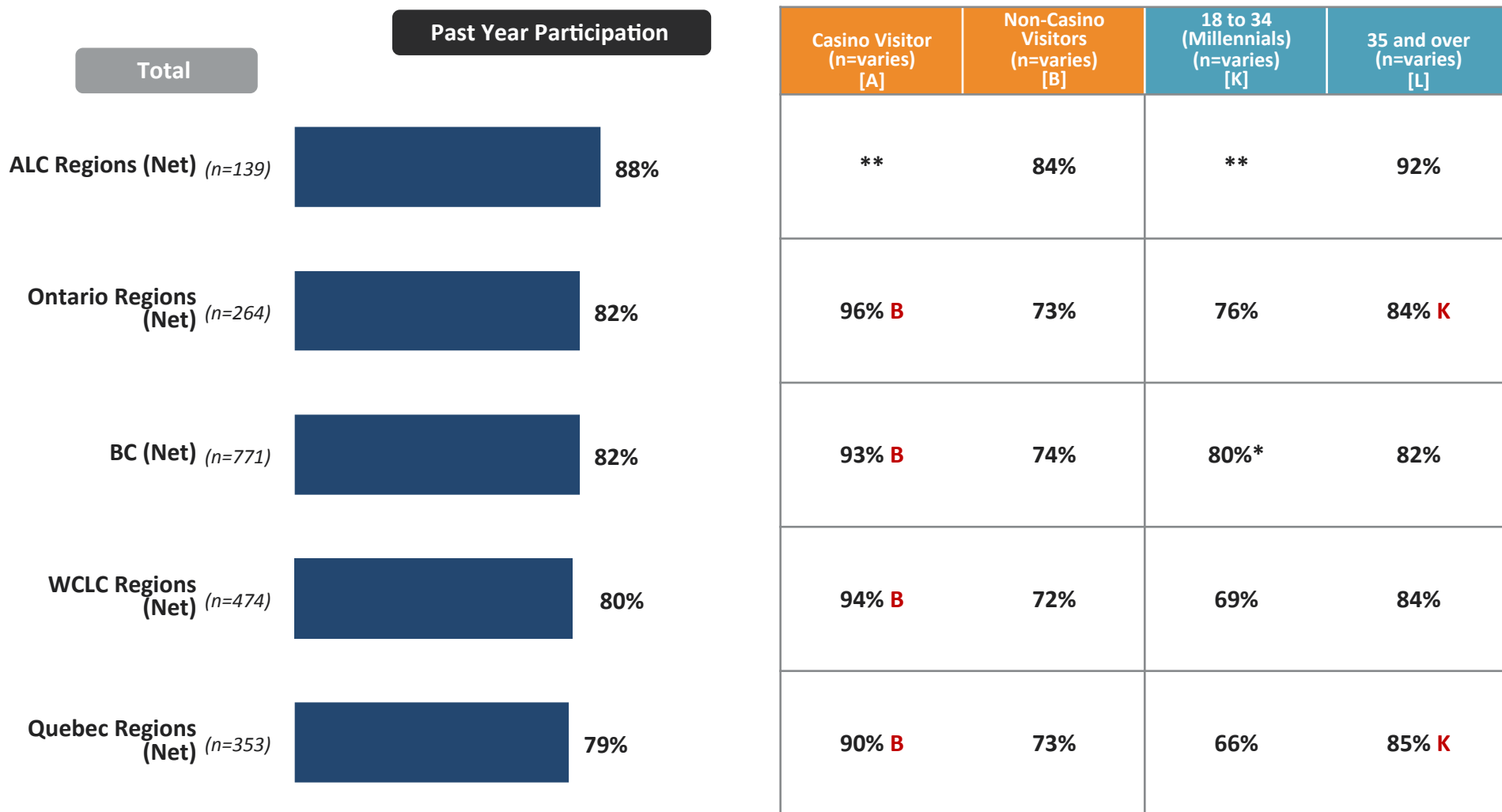
In all regions, Lotto 6/49 and Lotto Max were the top two most popular lottery games. Close to two-thirds of Canadians played Lotto 6/49 (67%) and Lotto Max (64%) in the past year. These high participation levels were driven predominantly by the ALC regions (73% and 71% for Lotto 6/49 and Lotto Max, respectively), particularly by Nova Scotia (80% and 77% for Lotto 6/49 and Lotto Max, respectively).

5

Scratch or Instant games showed a smaller proportion of core players in comparison to other lottery games available. Participation levels varied among regions however core players of Scratch or Instant games ranged between 7% and 15%, much lower when compared to other games with similar levels of past year participation (19% for BC Lotto Max vs 8% for Scratch/Instant games for instance).

LOTTERY PARTICIPATION

Lottery Games Participation – Across Canada



* Small base size, interpret with caution.

** Base too small to report.

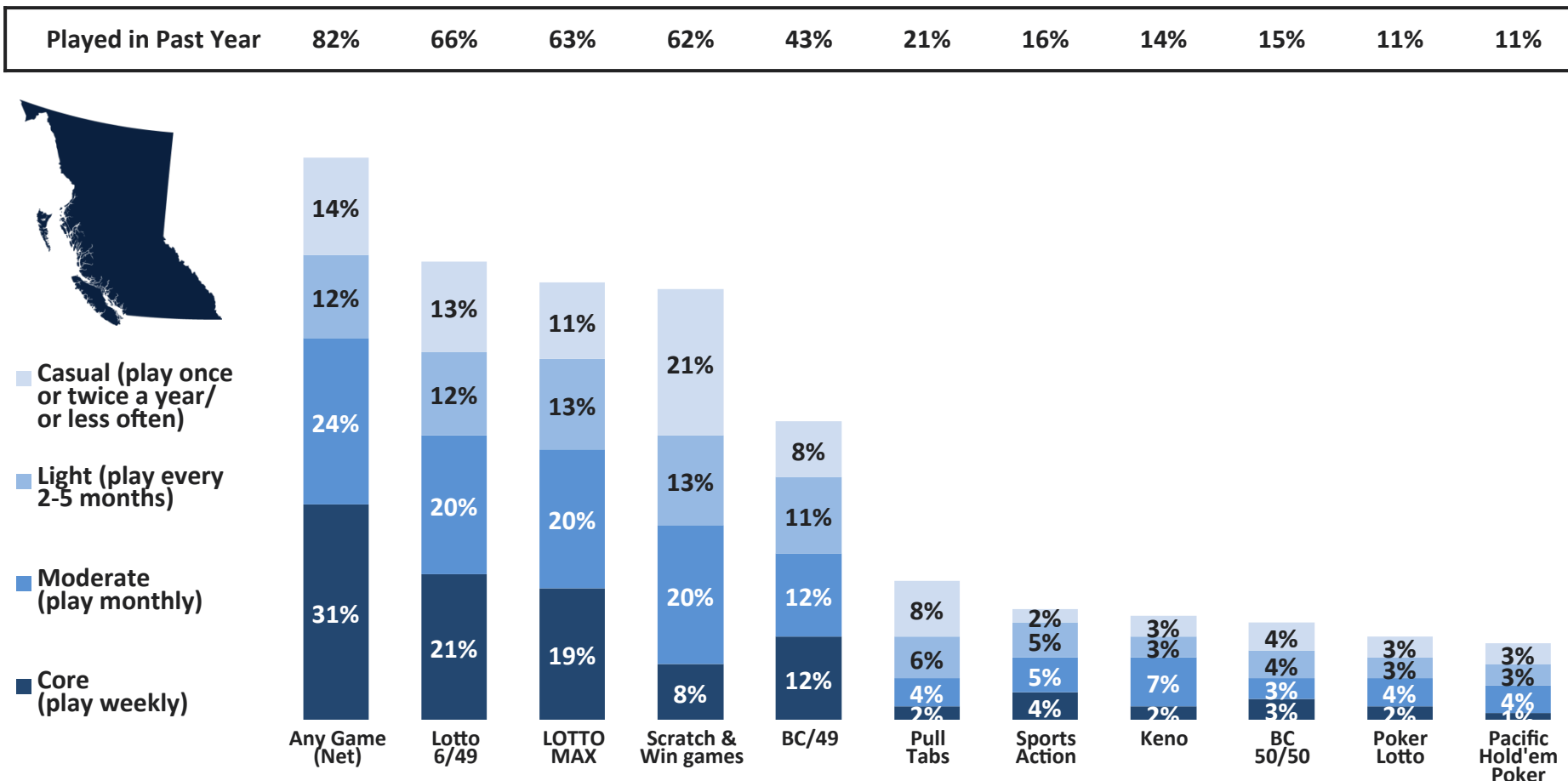
Base: Respondents from region

B1a. Which of the following statements best describes your involvement with the following lottery games?

ABCDKL Significantly higher than other subgroup.

LOTTERY PARTICIPATION

Lottery Games Participation – BC



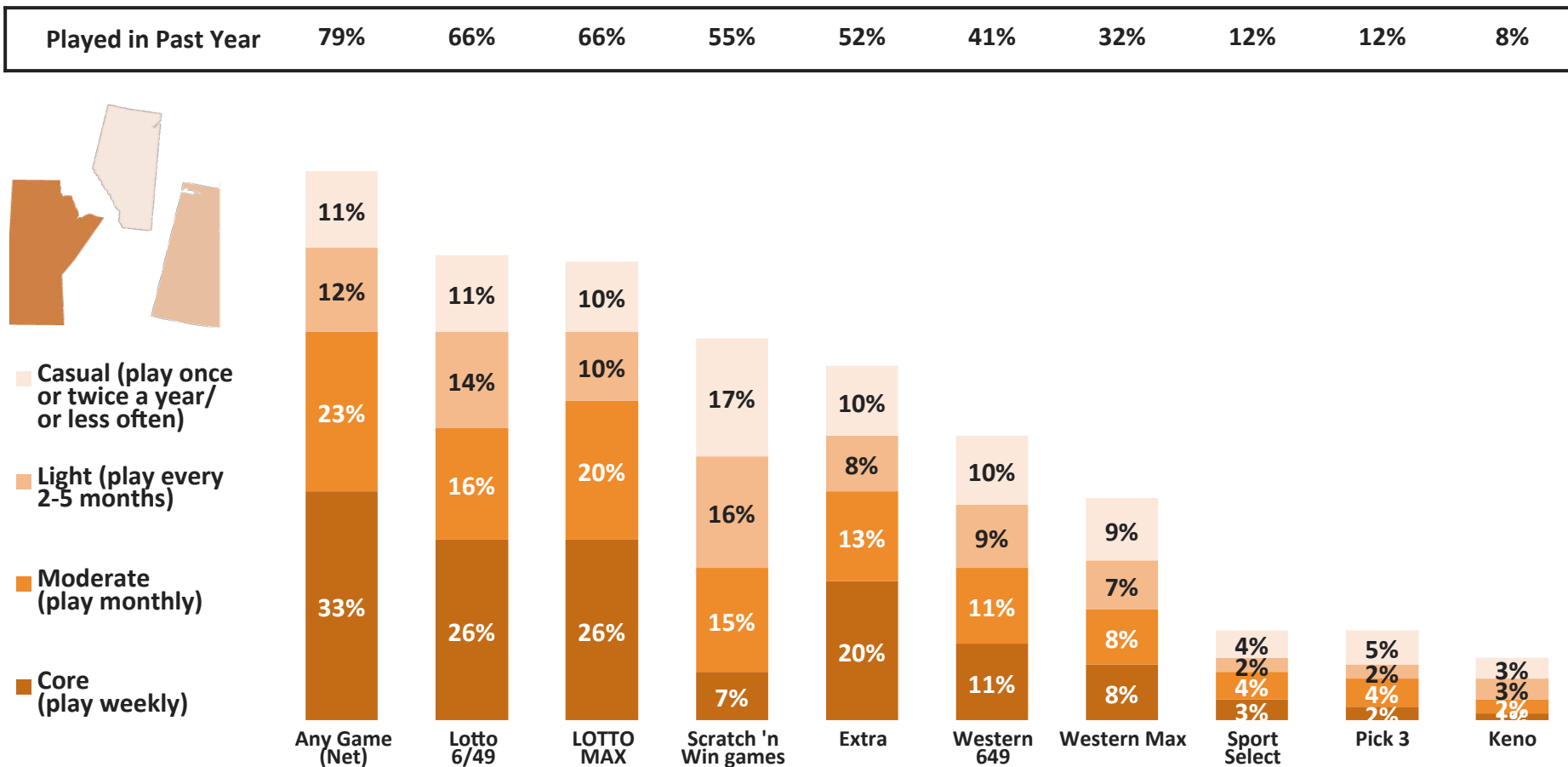
Base: British Columbia (n=264)

B1a. Which of the following statements best describes your involvement with the following lottery games?

B2. How often do you typically play each of the following lottery games ...?

LOTTERY PARTICIPATION

Lottery Games Participation – WCLC Regions (Alberta/Saskatchewan/Manitoba)



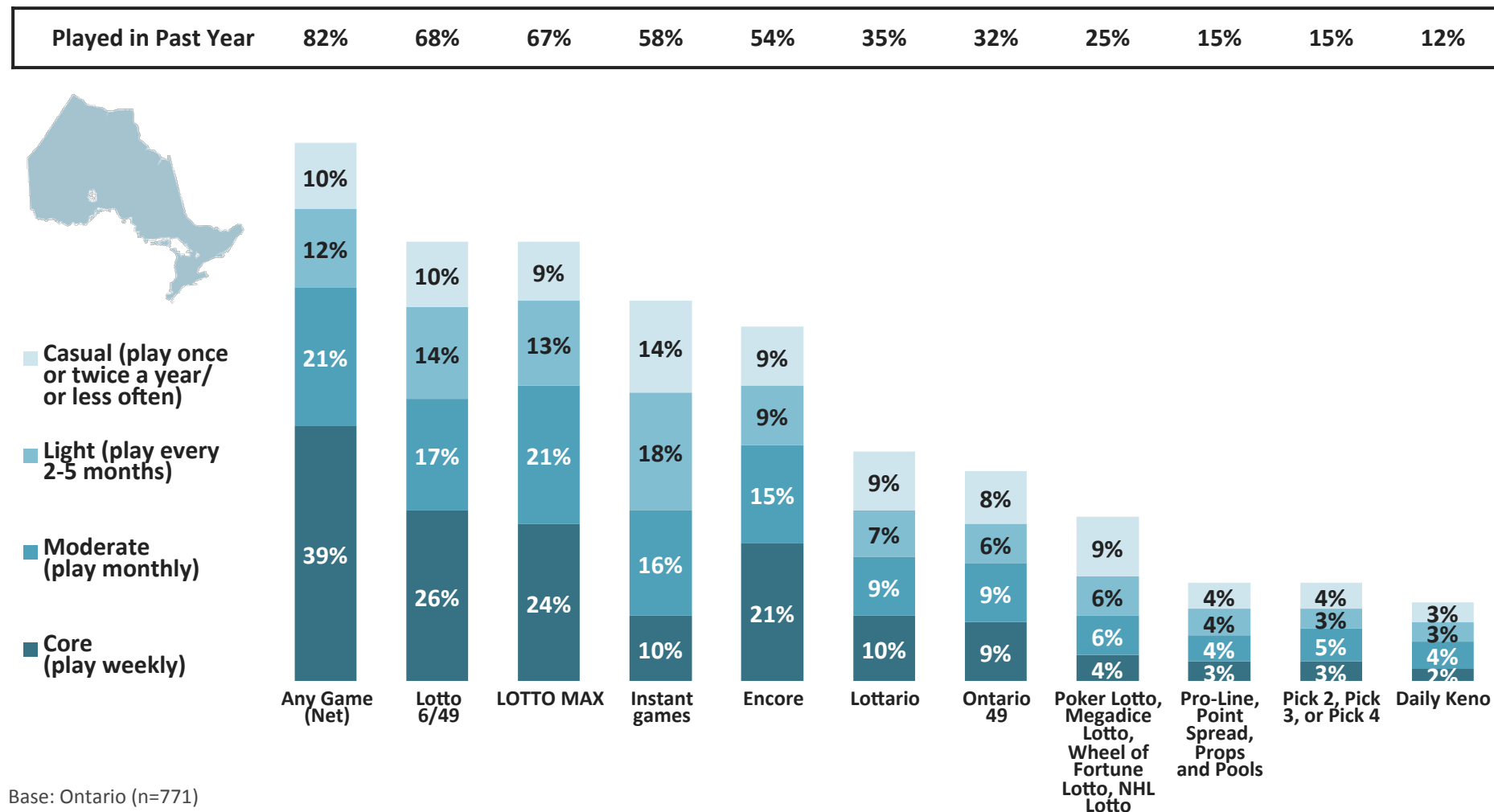
Base: Alberta/Saskatchewan/Manitoba (n=353)

B1a. Which of the following statements best describes your involvement with the following lottery games?

B2 How often do you typically play each of the following lottery games ...?

LOTTERY PARTICIPATION

Lottery Games Participation – Ontario



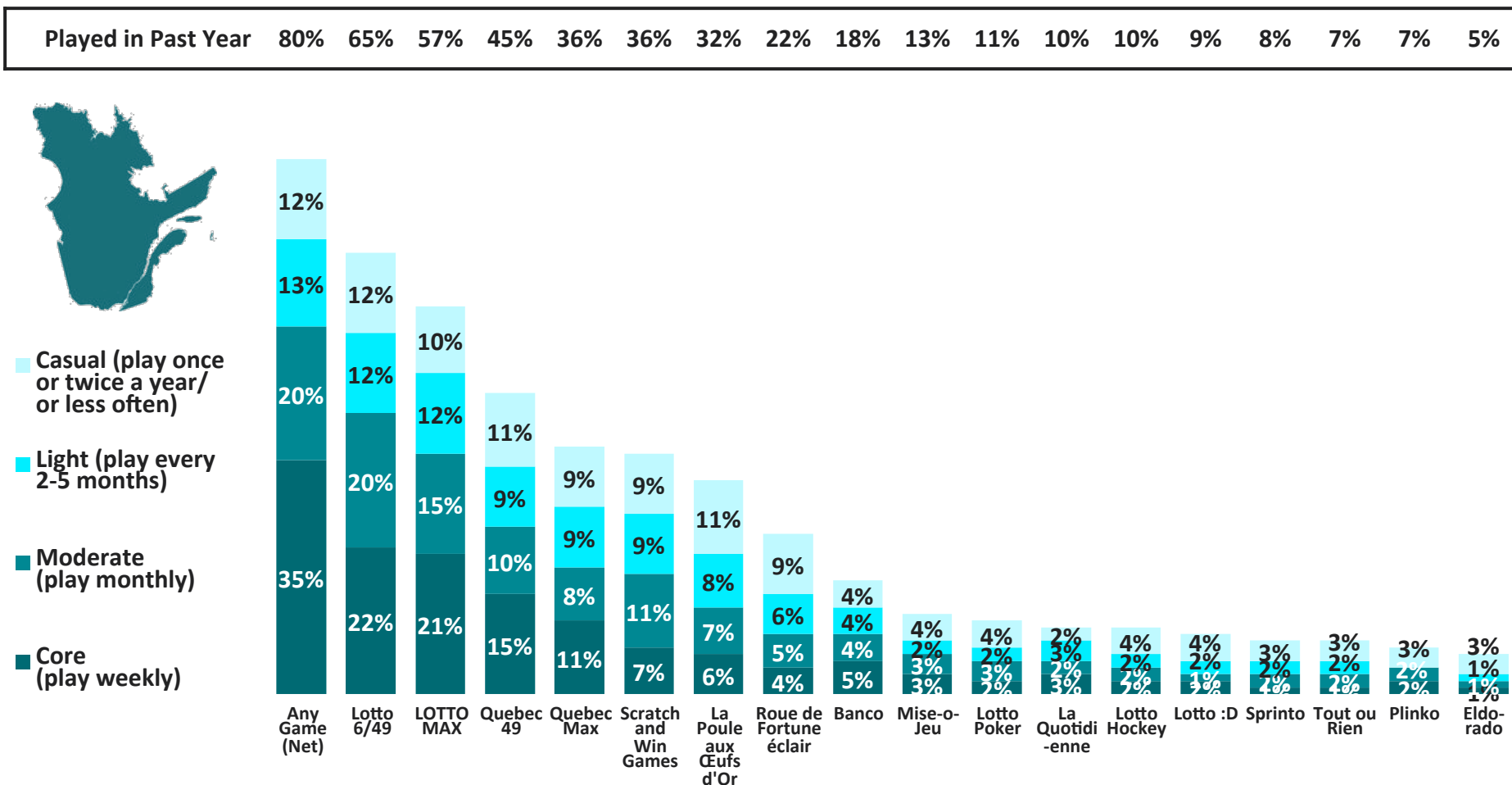
Base: Ontario (n=771)

B1a. Which of the following statements best describes your involvement with the following lottery games?

B2 How often do you typically play each of the following lottery games ...?

LOTTERY PARTICIPATION

Lottery Games Participation – Quebec



Base: Quebec (n=474)

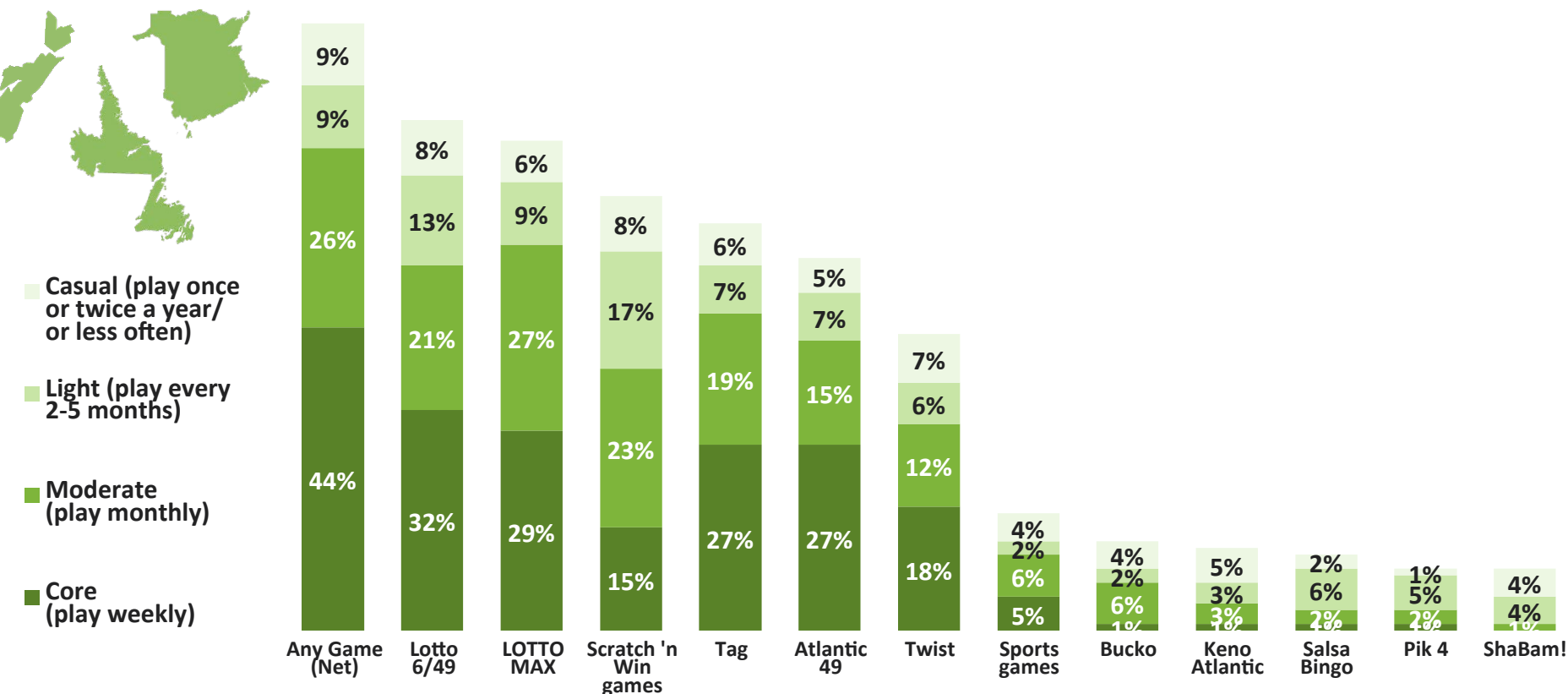
B1a. Which of the following statements best describes your involvement with the following lottery games?

B2 How often do you typically play each of the following lottery games ...?

LOTTERY PARTICIPATION

Lottery Games Participation – ALC Regions (Nova Scotia/New Brunswick/Newfoundland)


Played in Past Year 88% 73% 71% 63% 59% 54% 42% 16% 13% 11% 11% 9% 9%



Base: Nova Scotia/New Brunswick/Newfoundland (n=139)

B1a. Which of the following statements best describes your involvement with the following lottery games?

B2 How often do you typically play each of the following lottery games ...?



SECTION C BARRIER AND MOTIVATORS ANALYSIS

KEY LEARNINGS



1

Overall, the top barriers for non-casino visitors stem from disinterest in casinos, money constraints and a preference for other forms of entertainment. Non-visitors perceive casinos as an expensive entertainment option with many believing that they “cannot afford to go to the casinos as a regular form of entertainment”. The concern of overspending at casinos is another reason discouraging non-visitors from going to casinos.

As a long term investment strategy for the casinos, these barriers could be partly addressed through well-thought out communications and appealing promotions. There are also strong concerns around a lack of knowledge and not understanding casino offerings or games, possibly driving traffic elsewhere. This can potentially be addressed by marketing and messaging initiatives that help players gain a better understanding of the offerings available.

2

Barriers among millennials are similar to those of the non-casino visitors. However, the perception that casinos are a form of entertainment is not a top barrier among the younger demographic. The concern of overspending appears to be more pressing among millennials, so addressing this barrier through promotions or creative offers could help to get them through the doors.

KEY LEARNINGS CONT.

3 **Top reasons that are most likely to motivate casino visitation includes an opportunity for a fun night out and the anticipation of a possible win.** These main triggers are the same for slot players and sport betters, although sport betters seem to give more importance to the possibility of a winning experience, “with the chance to come out with more money in their pocket”.

4 **Millennials appear to be more motivated by the “fun” aspect of casinos than by the possibility of a casino win.** Top factors that encourage visitation among this group stem from the anticipation of a fun night out with friends as opposed to just ‘winning’.

Emphasizing the social component as well as the opportunity for a unique experience that casinos can offer in marketing initiatives could promote increased visitation among this group.

BARRIER ANALYSIS

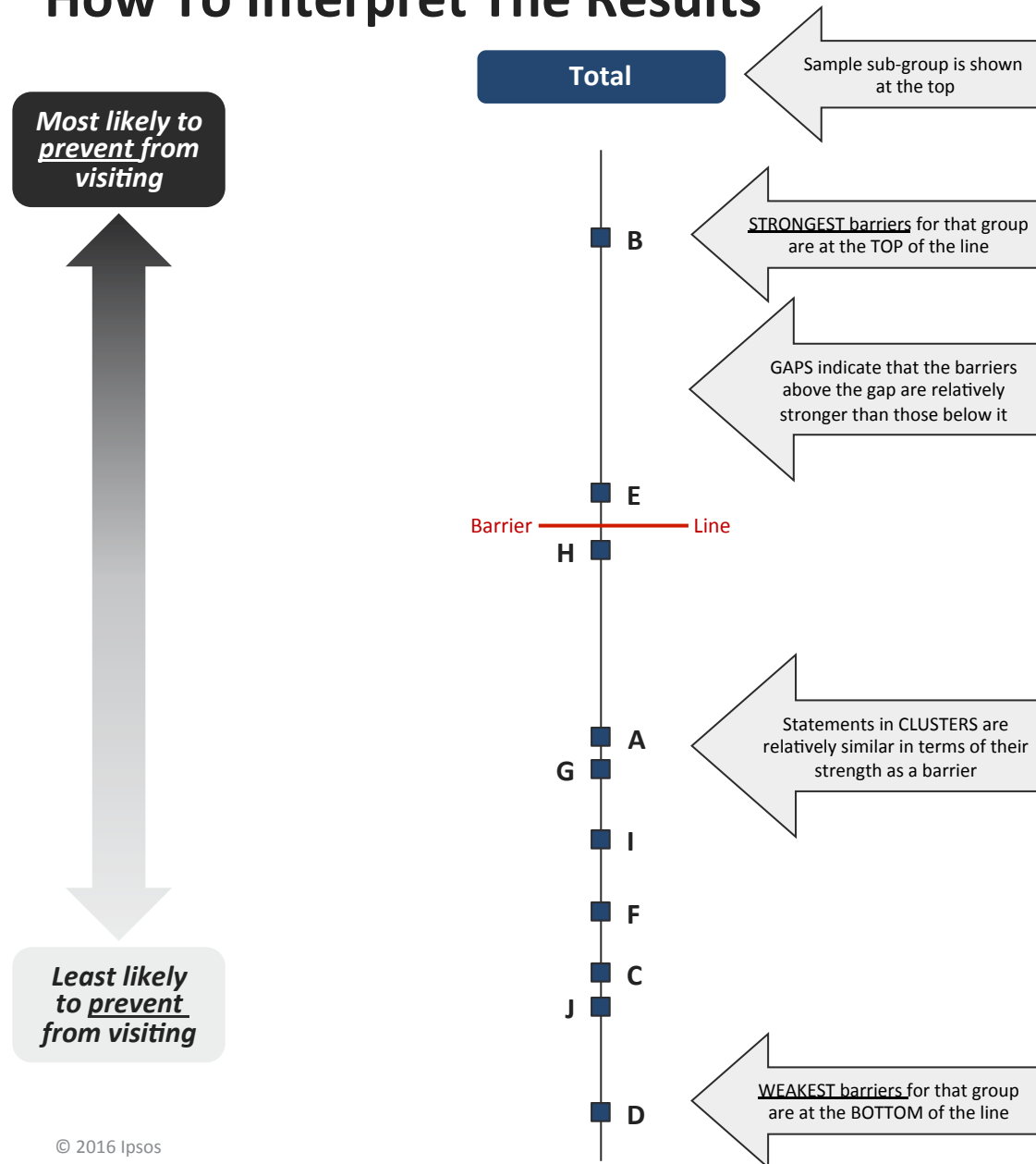
Barrier and Motivators Analysis Overview

- Ipsos used a Maximum Differential (“Max-Diff”) exercise, which is an effective way to measure consumer preferences for a single item from a selection of many similar items.
- Items are shown in sets and survey respondents are asked to indicate the most and least appealing item.
- In this study, respondents were shown 14 sets of 5 statements and asked which one of the statements is the reason that is most likely to prevent you from playing, and the reason that is least likely to prevent you from playing.
- Additionally, after each set of 5 statements, respondents were asked if all, some, or none of the statements listed prevented or motivated them to visit.
- “Max-Diff” assumes that respondents evaluate all possible combinations of items within the total set of choices.
- The “Max-Diff” exercise creates utility scores for each item in the choice set using a Bayesian Hierarchical procedure. The results are plotted on a vertical line, where the items are ranked relative to each other, with the strongest and weakest barriers or motivators being the benchmarks, located at each end of the vertical line.
- It is possible to split out different sub-groups for comparison, assuming the sample is large enough.
- Using this analysis, we can understand what the key barriers or motivators are to visiting a casino.



BARRIER ANALYSIS

How To Interpret The Results



The Barrier Line

The distance between the barrier and the line indicates the strength/weakness of the barrier.

The further up the vertical line, the more likely the barrier will prevent someone from playing the lottery. The further down the vertical line, the less likely the barrier will prevent someone from playing.

In this instance, barrier "B" is more likely to prevent someone from playing the lottery than barrier "E" which would be considered an excuse for not playing. Barrier "D" is not likely to prevent someone from playing.

BARRIER ANALYSIS FINDINGS

Barriers among Non-Casino Visitors and Millennials

Non-Casino Visitors

Playing casino games is not a good use of money

I would rather take part in other types of entertainment

I cannot afford to go to the casinos as a regular form of entertainment

I do not find playing casino games entertaining

I am afraid of overspending at casinos

Millennials

Playing casino games is not a good use of money

I cannot afford to go to the casinos as a regular form of entertainment

I would rather take part in other types of entertainment

I am afraid of overspending at casinos

BARRIER ANALYSIS FINDINGS

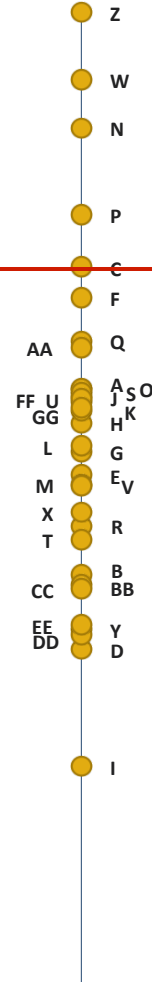
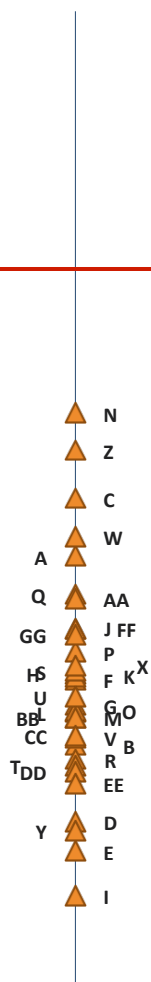
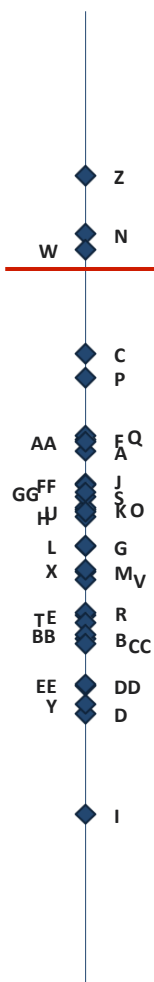
Barriers – Visitation

Most likely
to prevent
from visiting

Total
(n=2,001)

Casino Visitor
(n=746)

Non-Casino Visitors
(n=1,255)



A	Casinos are not in close, convenient proximity to where I live
B	From last study (top and bottom)
C	I am afraid of overspending at casinos
D	I am concerned other people would think negatively of me if I went to casinos
E	I am morally opposed to casino gambling
F	I am not intrigued by learning how to play casino games
G	I am not knowledgeable on what slot games casinos offer
H	I am not knowledgeable on what table games casinos offer
I	I am now restricted from smoking in casinos
J	I am unfamiliar with how much casino play time I get for my spending budget
K	I am unfamiliar with how much it costs to play casino games
L	I am unfamiliar with how to act at casino tables
M	I am unfamiliar with what slot game options are available at casinos
N	I cannot afford to go to the casinos as a regular form of entertainment
O	I do not expect to have a good social experience
P	I do not find playing casino games entertaining
Q	I do not know how much I will spend on a night out at the casino
R	I do not understand how to play slots
S	I do not understand how to play table games
T	I find slot games confusing
U	I find the atmosphere in the casino gaming floor to be overwhelming
V	I think people who go to casinos are heavy gamblers
W	I would rather take part in other types of entertainment
X	No one I know will go with me to casinos
Y	People who go to casinos are a part of an older demographic
Z	Playing casino games is not a good use of money
AA	The amount of entertainment I get from playing casino games is too uncertain
BB	The customer service is lacking
CC	The food is of lesser quality than other dining options available outside a casino
DD	The look and feel of the casino is outdated
EE	The number of dining options available are too small
FF	The tickets to events/live shows are out of my price range
GG	There is no opportunity for me to try my hand at casino games before I play for real money

Base: All respondents

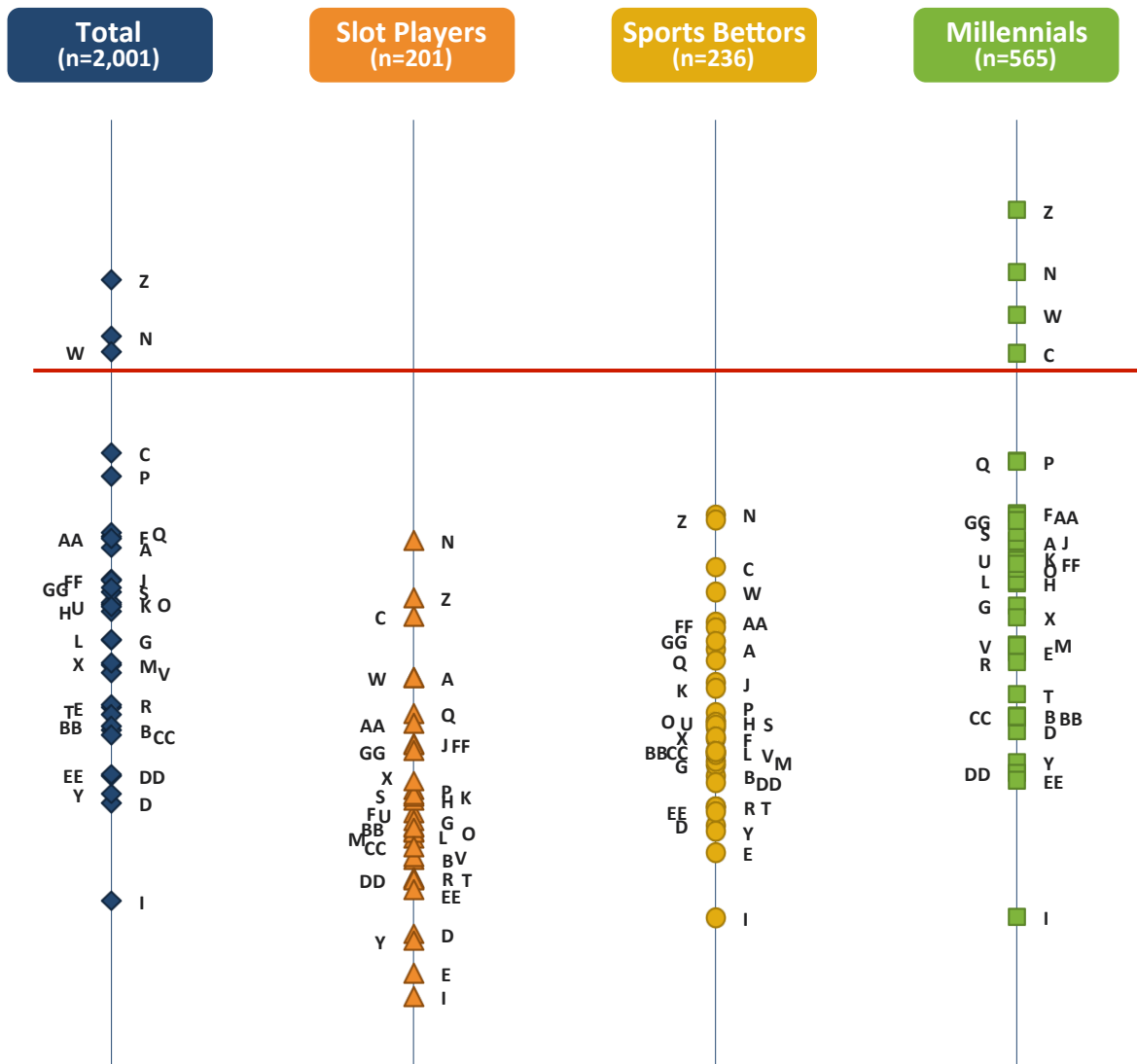
BARRIER ANALYSIS FINDINGS

Barriers – Subgroups

Most likely
to prevent
from visiting



Least likely
to prevent
from visiting



A	Casinos are not in close, convenient proximity to where I live
B	From last study (top and bottom)
C	I am afraid of overspending at casinos
D	I am concerned other people would think negatively of me if I went to casinos
E	I am morally opposed to casino gambling
F	I am not intrigued by learning how to play casino games
G	I am not knowledgeable on what slot games casinos offer
H	I am not knowledgeable on what table games casinos offer
I	I am now restricted from smoking in casinos
J	I am unfamiliar with how much casino play time I get for my spending budget
K	I am unfamiliar with how much it costs to play casino games
L	I am unfamiliar with how to act at casino tables
M	I am unfamiliar with what slot game options are available at casinos
N	I cannot afford to go to the casinos as a regular form of entertainment
O	I do not expect to have a good social experience
P	I do not find playing casino games entertaining
Q	I do not know how much I will spend on a night out at the casino
R	I do not understand how to play slots
S	I do not understand how to play table games
T	I find slot games confusing
U	I find the atmosphere in the casino gaming floor to be overwhelming
V	I think people who go to casinos are heavy gamblers
W	I would rather take part in other types of entertainment
X	No one I know will go with me to casinos
Y	People who go to casinos are a part of an older demographic
Z	Playing casino games is not a good use of money
AA	The amount of entertainment I get from playing casino games is too uncertain
BB	The customer service is lacking
CC	The food is of lesser quality than other dining options available outside a casino
DD	The look and feel of the casino is outdated
EE	The number of dining options available are too small
FF	The tickets to events/live shows are out of my price range
GG	There is no opportunity for me to try my hand at casino games before I play for real money

Base: All respondents



MOTIVATOR ANALYSIS FINDINGS



It's all about the fun and anticipated possible win!

Casino Visitors

Casinos offer an occasional fun night out.

I am excited by the possibility of a casino win.

The anticipation of winning.

Slot Players

Casinos offer an occasional fun night out.

I am excited by the possibility of a casino win.

The anticipation of winning.

Sports Bettors

I am excited by the possibility of a casino win.

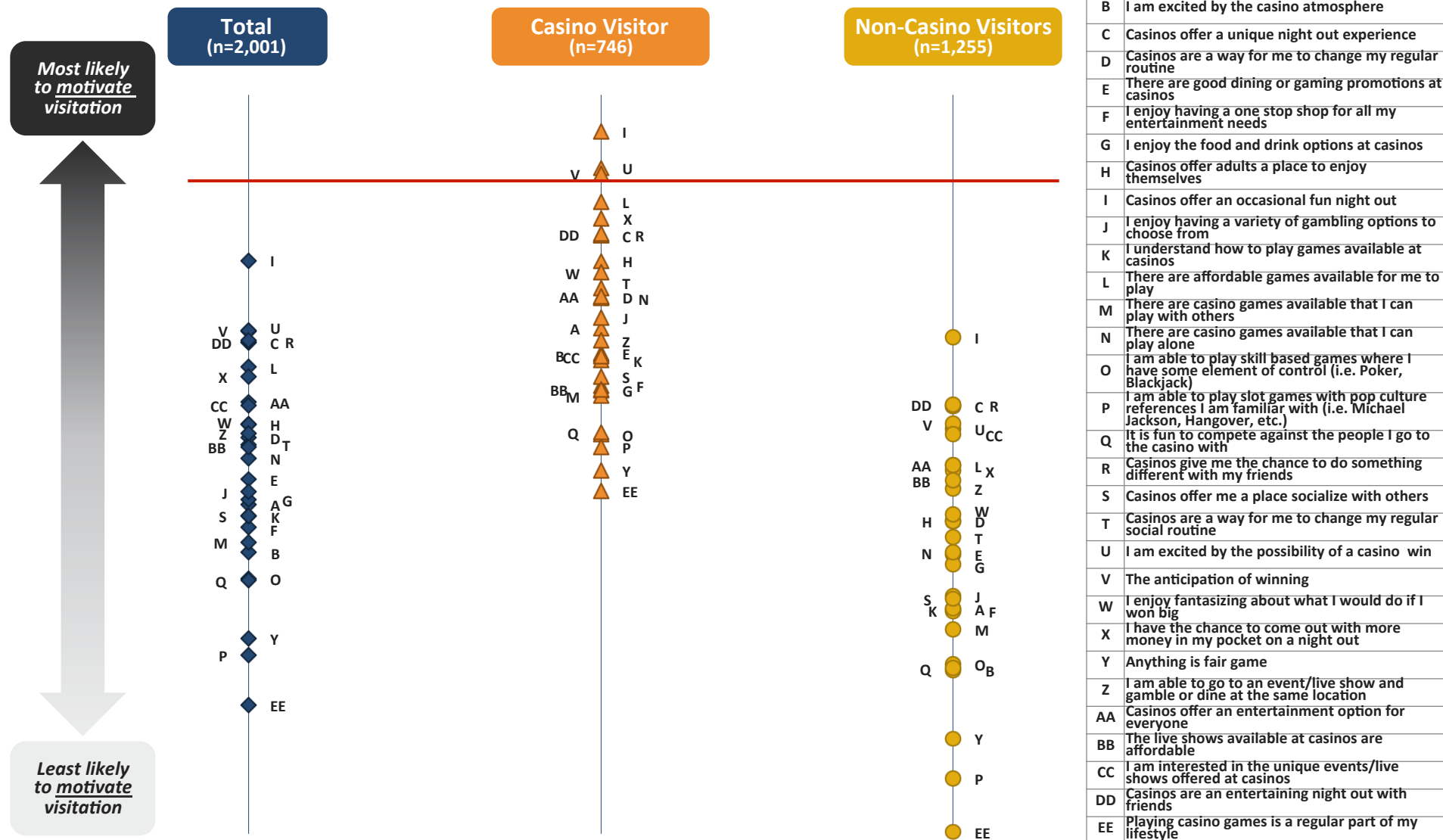
Casinos offer an occasional fun night out.

The anticipation of winning.

I have the chance to come out with more money in my pocket on a night out.

MOTIVATOR ANALYSIS FINDINGS

Motivations to Visit - Visitors



Base: All respondents

MOTIVATOR ANALYSIS FINDINGS

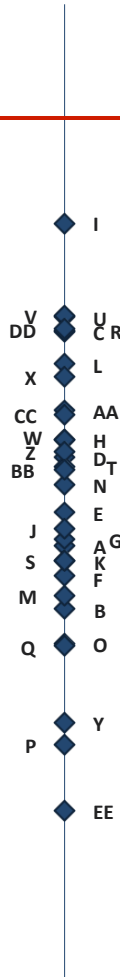
Motivations to Visit - Other

Most likely
to motivate
visitation



Least likely
to motivate
visitation

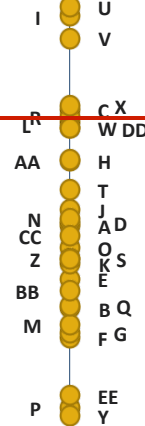
Total
(n=2,001)



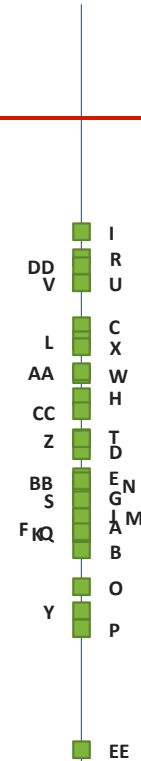
Slot Players
(n=201)



Sports Bettors
(n=236)



Millennials
(n=565)



A	Casinos are a place for me to relax and be care free
B	I am excited by the casino atmosphere
C	Casinos offer a unique night out experience
D	Casinos are a way for me to change my regular routine
E	There are good dining or gaming promotions at casinos
F	I enjoy having a one stop shop for all my entertainment needs
G	I enjoy the food and drink options at casinos
H	Casinos offer adults a place to enjoy themselves
I	Casinos offer an occasional fun night out
J	I enjoy having a variety of gambling options to choose from
K	I understand how to play games available at casinos
L	There are affordable games available for me to play
M	There are casino games available that I can play with others
N	There are casino games available that I can play alone
O	I am able to play skill based games where I have some element of control (i.e. Poker, Blackjack)
P	I am able to play slot games with pop culture references I am familiar with (i.e. Michael Jackson, Hangover, etc.)
Q	It is fun to compete against the people I go to the casino with
R	Casinos give me the chance to do something different with my friends
S	Casinos offer me a place socialize with others
T	Casinos are a way for me to change my regular social routine
U	I am excited by the possibility of a casino win
V	The anticipation of winning
W	I enjoy fantasizing about what I would do if I won big
X	I have the chance to come out with more money in my pocket on a night out
Y	Anything is fair game
Z	I am able to go to an event/live show and gamble or dine at the same location
AA	Casinos offer an entertainment option for everyone
BB	The live shows available at casinos are affordable
CC	I am interested in the unique events/live shows offered at casinos
DD	Casinos are an entertaining night out with friends
EE	Playing casino games is a regular part of my lifestyle

Base: All respondents



SECTION D SLOT PLAY



KEY LEARNINGS

1

The majority of slot players appear to fit within two main categories of slot play, those who gamble as long as it is fun and entertaining (41%), and those who gamble with the goal of keeping their money as long as possible (36%). A smaller proportion of slot players describe their slot play as an entertaining risk where they play to win (15%).

2

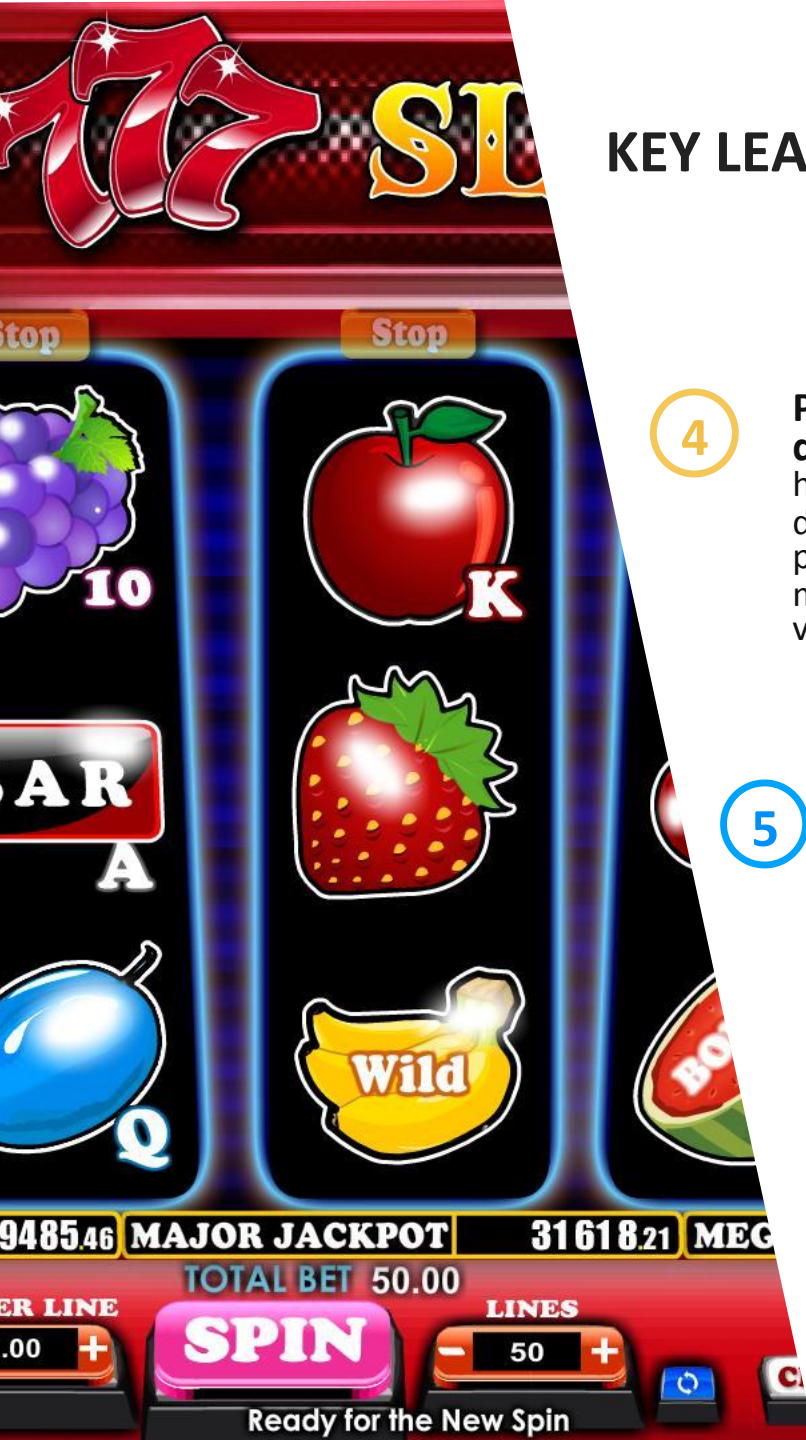
The average bet per spin is \$2.80, with an average of 5.8 different slot machines being played per visit. Over two in five slot players (43%) bet an average of 1\$ or less during a typical casino visit, while less than a third (31%) bet 1.50\$ or more. Sport bettors tend to bet a larger amount per spin on average (\$3.70 vs \$2.60 for slot players).

A third of slot players (34%) play 1 to 3 different slot machines on a typical casino visit. A similar proportion (32%) play on 4 to 6 different machine, while 16% try more than 6 slot machines per visit on average.

3

Slot machines with quarter denominations appear to be the most popular with 60% of slot players playing them in a typical session. Penny slots and nickel slots are the next most played denominations (46% and 41% respectively).

KEY LEARNINGS CONT.



4

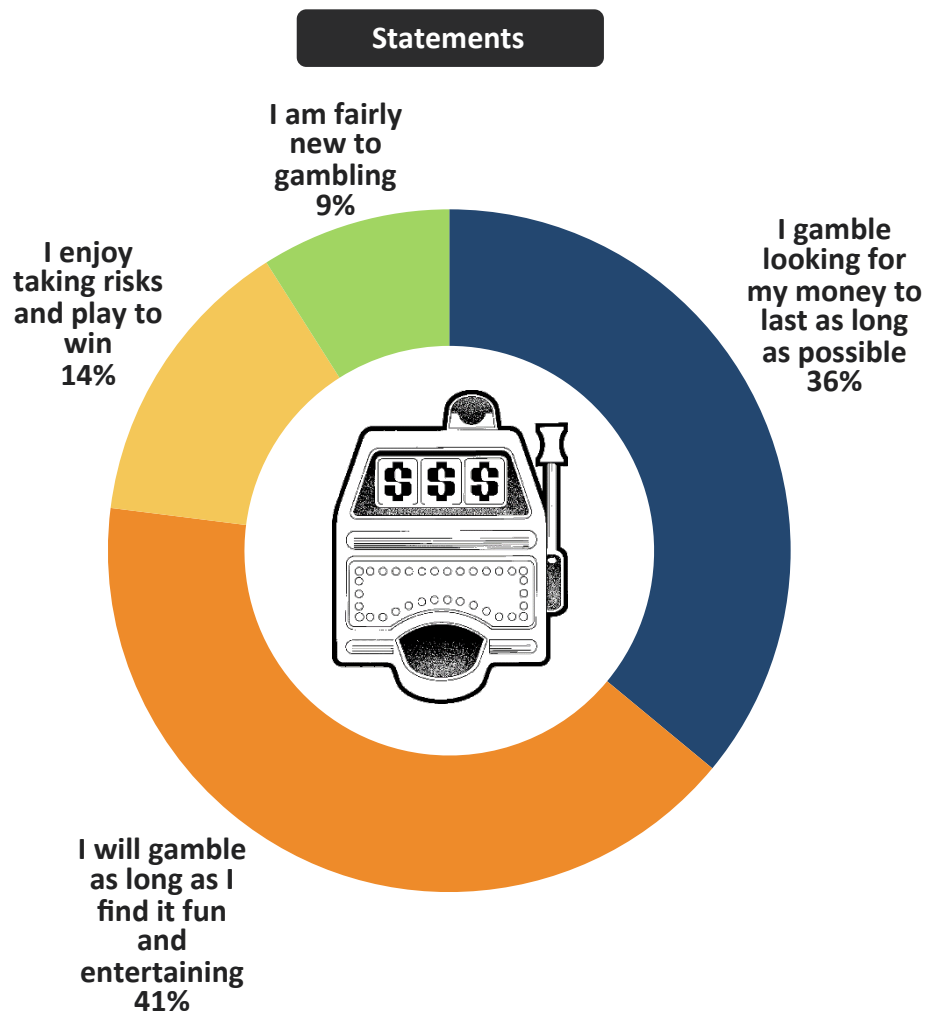
Players are using a number of different criteria when deciding which slot games to play. The elements that ranked in highest importance included how the game plays (79%), the denomination (77%), the bonus feature (73%), frequent small payouts (70%), and the cost to bet on all lines (69%). Where the machine was located in the playing area and it being mechanical (not video enabled) were less important factors to slot players.

5

Almost half of Canadians find the idea of skill-based slots appealing (46%). Having an outcome with a skill component is also attractive among casino visitors with three-in-five (61%) rating high appeal. This could be an opportunity for casinos to expand their game and slot offerings to further encourage visitation. This feature also held appeal among non-visitors (37%) and non-slot players (53%).

SLOT PLAY

Slot Play Self Segmentation



	Casino Visitor (n=557) [A]	Sports Bettors (n=115) [E]	Non-Sports Bettors (n=159) [F]	Slot Players (n=489) [G]
Mean Visitation (exc. 0)	9.7	19.0 F	7.41	9.2
Slot Mean Spend	\$2.80	\$3.70	\$2.80	\$2.60
.01-.50	18%	13%	18%	18%
.51-\$1	25%	28%	29%	26%
\$1.01-\$1.50	4%	5%	2%	4%
\$1.50-\$3.00	14%	16%	17%	14%
\$3.01+	17%	26% F	13%	16%
I don't know	23%	13%	22%	21%
Median	1.0	2.0	1.0	1.0

Base: Play slot machines (n=557)

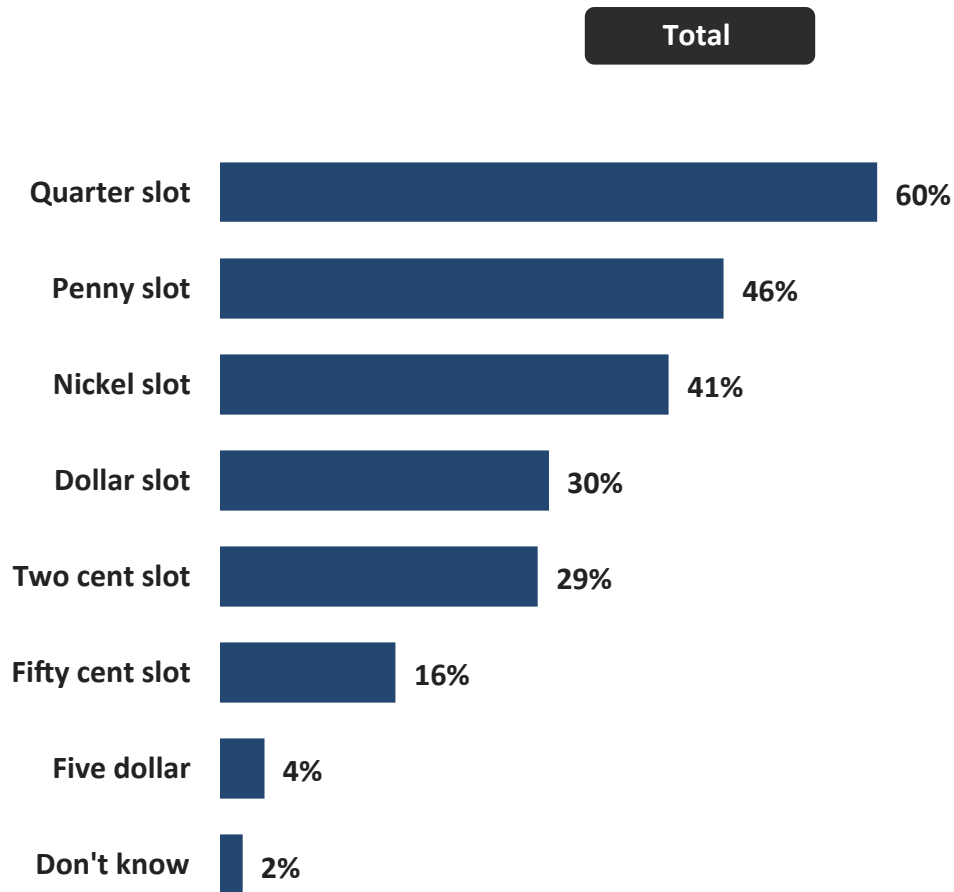
A11. Which of the following statements best describes your slot play?

Base: Play slot machines

A13. Thinking about a typical visit to the casino where you play slots, what is your average bet for each spin?

SLOT PLAY

Slot Play - Typical Slot Denomination

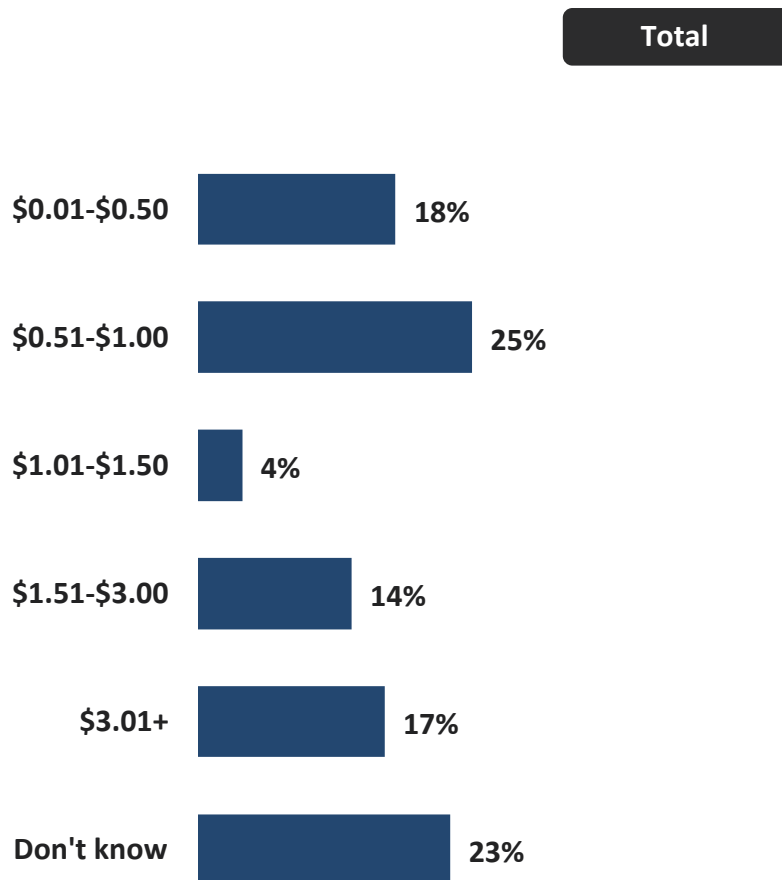


Base: Play slot machines (n=557)

A12. Thinking about a typical visit to the casino where you play slots, what price (or denomination) of machines do you play in a typical session (i.e. bet per line)?

SLOT PLAY

Slot Play - Average Bets Per Spin



Median Bet

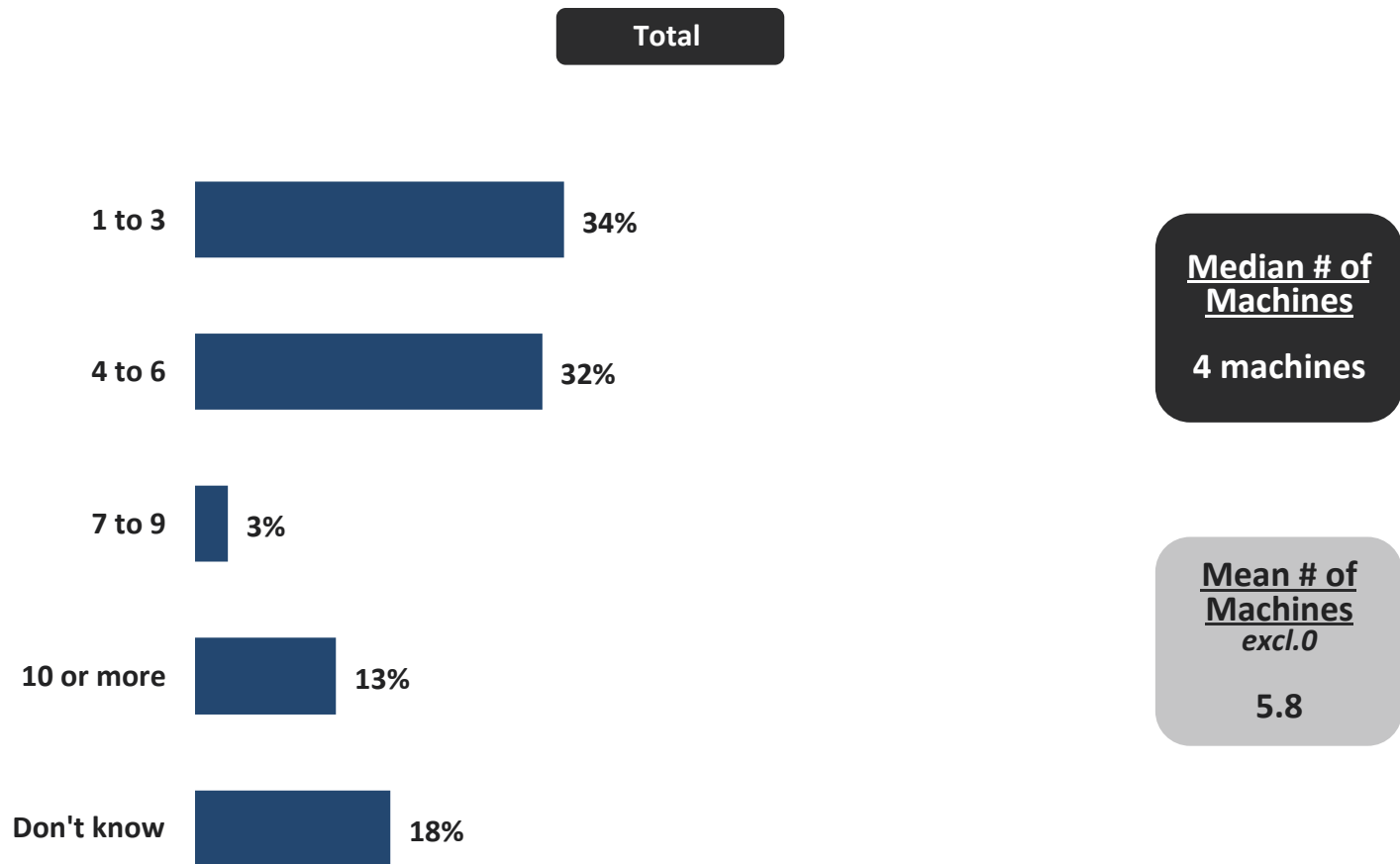
\$1.00

Base: Played slot machines (n=557)

A13. Thinking about a typical visit to the casino where you play slots, what is your average bet for each spin?

SLOT PLAY

Slot Play - Number of Machines Played

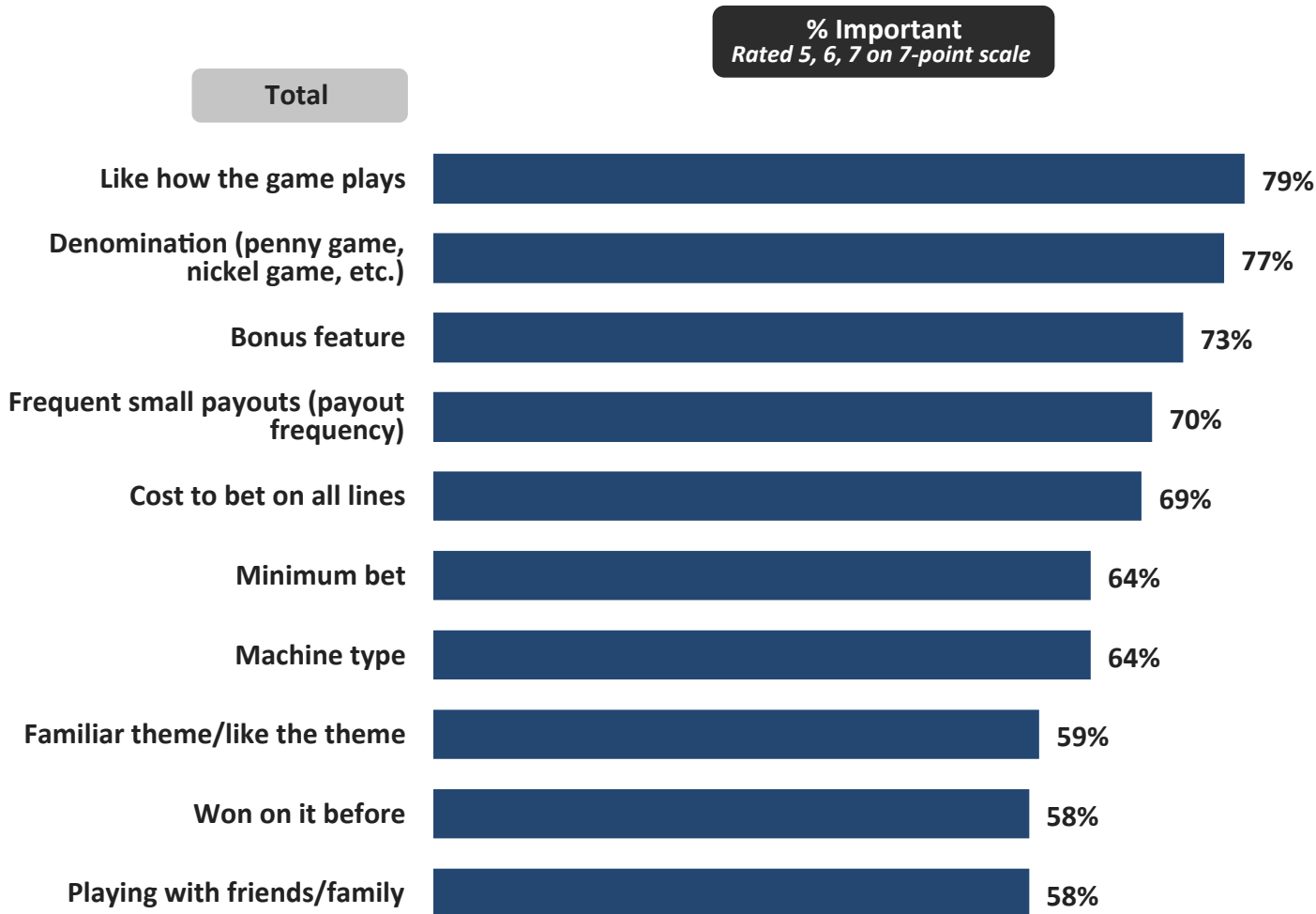


Base: Play slot machines (n=557)

A14. Thinking about a typical visit to the casino where you play slots, how many different machines do you play?

SLOT PLAY

Slot Play - Drivers of Slot Games Selection

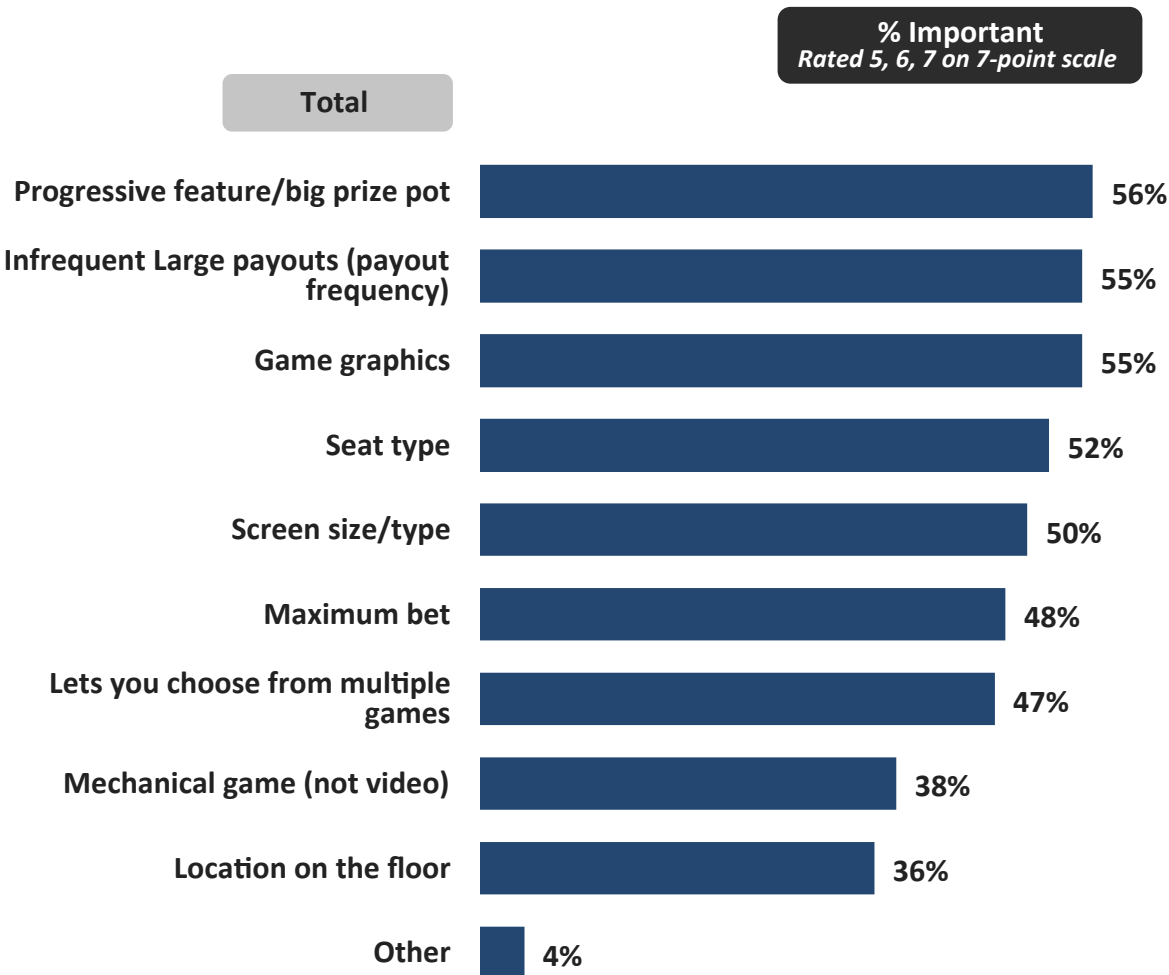


Base: Play slot machines (n=557)

A15a/b. How important are the following elements when deciding which slot games to play when you visit a casino/community gaming centres in the province where you live?

SLOT PLAY

Slot Play - Drivers of Slot Games Selection (continued)



Base: Play slot machines (n=557)

A15a/b. How important are the following elements when deciding which slot games to play when you visit a casino/community gaming centres in the province where you live?

SLOT PLAY

Appeal of Skill-Based Slot Games



46%

Find a slot game that has a skill-based element to it appealing (rated 5, 6, 7 on 7-point scale).

61%
Visitors

37%
Non-Visitors

39%
Non-Visitors
18-34

36%
Non-Visitors
35+

67%
Sports
Bettors

57%
Non-Sports
Bettors

63%
Slot
Players

53%
Non-Slot
Players

60%
Core

66%
Moderate

63%
Light

57%
Casual

Base: All respondents (n=2,001)

D1. How appealing is a slot game that has a skill-based element to it? So rather than the outcome of the game being random, there would be a skill component to the outcome.

SLOT PLAY

Appeal of Skill-Based Slot Games

Total

7 - Very appealing

10%

6

13%

5

22%

4

23%

3

9%

2

7%

1 - Not at all appealing

16%

%
Appealing
46%

% Not
Appealing
32%

Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
61% B	37%	39%	36%	67% F	57%	63% H	53%
22%	23%	25%	22%	20%	19%	21%	27%
17%	41% A	36%	43% C	13%	24% E	16%	20%

Base: All respondents (n=2,001)

D1. How appealing is a slot game that has a skill-based element to it? So rather than the outcome of the game being random, there would be a skill component to the outcome.

ABCDEFH Significantly higher than other subgroup.



SECTION E FUTURE STATE OF CASINOS

A man and a woman are smiling and looking at the camera while standing behind a green casino table. The man is in the center, wearing a dark suit and a light green shirt, with his hands outstretched. The woman is on the left, wearing a white dress and a large diamond ring, holding a glass of champagne. The table is covered with a green felt and has various casino chips and dice scattered on it. In the background, there are bright, colorful lights and a large screen displaying a game.

KEY LEARNINGS

1

When presented with a new casino concept that integrates multigame space with live hosts and interactive terminals, 42% of Canadians found it very appealing. Appeal was higher among casino visitors (59%), sport bettors (65%) and slot players (63%). An integration of this concept may be an opportunity for casinos as the concept also held appeal among non-visitors and non-slot players (32% and 42%, respectively) and a multigame interactive space may help encourage visitation among these groups.

2

More than a third (35%) of Canadians would be likely to visit a casino to experience this new concept, and 32% would be likely to invite friends to experience it. The majority (60%) of casino visitors were also likely to visit a gaming facility if they offered this concept.

3

The new concept has potential to encourage visitation among millennials by generating the “fun” aspect that appeals to this group. Millennial non-visitors are more likely to visit a casino to experience this new concept than those 35 years old and older (24% vs 19%, respectively), and they would also be more likely to invite friends to experience the casino concept (25% vs 18%, respectively).

FUTURE STATE OF CASINOS

Appeal of Casino Concept

"Gaming as you've never played before. A multigame space with live hosts, approx. 50 interactive terminals to play alone or in a group, and decor that changes according to the lights and sounds. A festive atmosphere by night, calmer by day, but always exciting. Look for this area in the Casino to enjoy a gaming experience that's unique in North America."

42%

Find this concept appealing (rated 5, 6, 7 on 7-point scale).



59%

Visitors

32%

Non-Visitors

36%

Non-Visitors
18-34

31%

Non-Visitors
35+

65%

Sports
Bettors

52%

Non-Sports
Bettors

63%

Slot
Players

42%

Non-Slot
Players

62%

Core

63%

Moderate

62%

Light

54%

Casual

Base: All respondents (n=2,001)

D2. Please indicate how appealing this casino concept is to you.

FUTURE STATE OF CASINOS

Appeal of Casino Concept Word Cloud



Note: The larger the font the more times the word was mentioned

Base: All respondents (n=2,001)

D3. What are your reasons for saying that?

FUTURE STATE OF CASINOS

Likelihood to Visit the Casino to Experience the Casino Concept

"Gaming as you've never played before. A multigame space with live hosts, approx. 50 interactive terminals to play alone or in a group, and decor that changes according to the lights and sounds. A festive atmosphere by night, calmer by day, but always exciting. Look for this area in the Casino to enjoy a gaming experience that's unique in North America."

35%

Are likely to visit this casino (rated 5, 6, 7 on 7-point scale).



60%

Visitors

20%

Non-Visitors

24%

Non-Visitors
18-34

19%

Non-Visitors
35+

61%

Sports
Bettors

43%

Non-Sports
Bettors

64%

Slot
Players

40%

Non-Slot
Players

63%

Core

61%

Moderate

66%

Light

53%

Casual

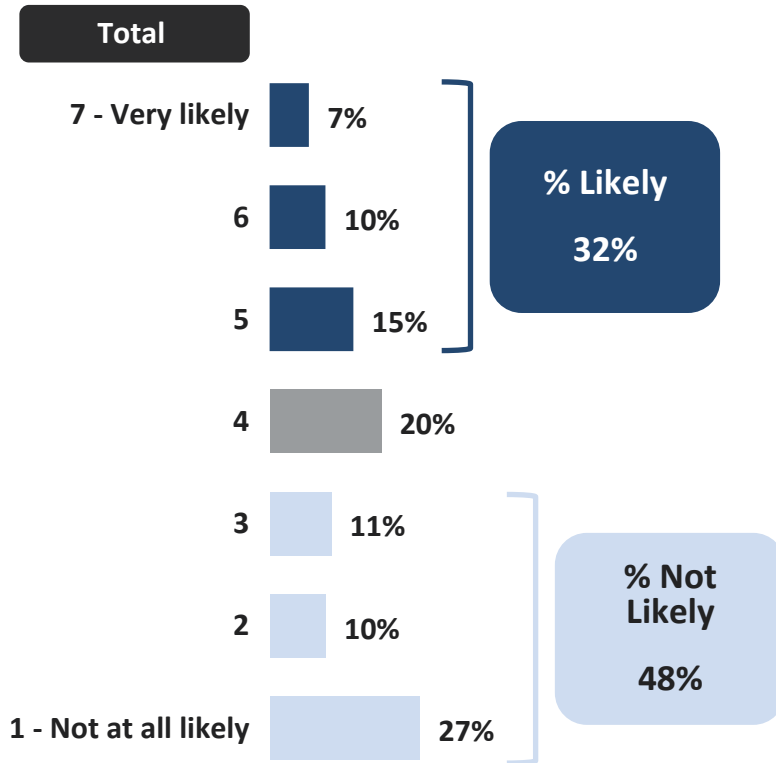
Base: All respondents (n=2,001)

D4. How likely are you to Visit this casino.

FUTURE STATE OF CASINOS

Likelihood to Invite Friends to the Casino to Experience the Casino Concept

"Gaming as you've never played before. A multigame space with live hosts, approx. 50 interactive terminals to play alone or in a group, and decor that changes according to the lights and sounds. A festive atmosphere by night, calmer by day, but always exciting. Look for this area in the Casino to enjoy a gaming experience that's unique in North America."



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
53% B	20%	25% D	18%	56% F	42%	64% H	40%
23% B	17%	21%	16%	22%	22%	21%	33% G
24%	63% A	55%	67% C	23%	37% E	15%	28% G

Base: All respondents (n=2,001)

D4. How likely are you to Invite your friends to visit this casino.

ABCDEF GH Significantly higher than other subgroup.

SECTION F SPORTS BETTING LANDSCAPE AND FUTURE STATE

KEY LEARNINGS

1

One-in-five (20%) Canadians made at least one sports bet during the past year. This included betting on sport pools (13%), sport wagers or sport outcomes (12%), horse races (10%), and fantasy sports (8%).

Among non-sport bettors, there is some potential for participation, as over a quarter (28%) take an active role in following professional sports and less than one fifth (18%) enjoy being in fantasy sport for fun.

2

The NHL, MLB and NFL are the most appealing sports leagues for Canadians (45%, 24% and 24% respectively). In total, 80% of bettors made at least one bet in the past year on one of these three leagues.

These are also the leagues on which bettors bet the most: 65% of bettors bet at least once for NHL, 42% for NFL and 27% for MLB. Despite having the same level of appeal as the MLB league, NFL managed to recruit more bettors. However, MLB bettors bet higher wagers on average (\$68.30 vs \$67.30 (NHL) vs \$28.70 (NFL)).

3

Almost half of bettors (46%) place bets with their friends and family, but website usage follows close behind. Websites are used by 39% of bettors, mainly on their personal computer (70%). Smartphone (16%) and tablets (14%) are not currently being used by many bettors.

Bet 365 and Proline are the most frequented websites for betting online (used by 26% and 23% of bettors).

Bookmakers were used by 9% of bettors to place bets in the previous year.

KEY LEARNINGS CONT.

4

7 out of 10 (69%) sport bettors plan to make sport bets next year, compared to 79% of casino visitors. The appeal of a dedicated sports betting area however is not very strong among Canadians (19%), but it could interest sport bettors (49%) and casino visitors (30%).

5

Bill C-290 is not widely known by Canadians with only 5% aware of this bill on an unaided basis. This rose to 16% after an explanation of the bill was offered. Awareness was relatively low among sports bettors as well (16% unaided and 33% aided). The impact of this bill passing would be positive for sports bettors. Those betting through websites show the greatest net increase of 14 points. Even a quarter of non-sports bettors stated that they would be likely to make sport bets if Bill C-290 were to pass.

6

When presented with the concept of a dedicated sports betting area in sports bars that would likely coincide with the passing of Bill C-211, 18% of Canadians found it very appealing. Over half (56%) of sports bettors found the concept very appealing, while almost one-third of casino visitors (29%) also rated it high in appeal. Similar proportions of sports bettors (51%) and casino visitors (27%) would be likely to visit a sports bar in Canada that provided a dedicated sports betting area.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Past Year Sports & Horse Betting Participation

Betting on Sports Outcomes “Sports Bettors”



Sports Pools



Fantasy Sports Contests



Betting on Horse Races



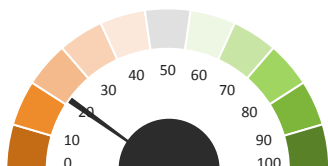
SPORTS BETTING LANDSCAPE AND FUTURE STATE

Canadian's Past Year Sports Betting Participation

Real Money Participation – Total % Yes

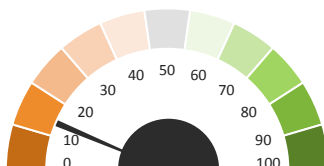
Any Activity (Net)

20%



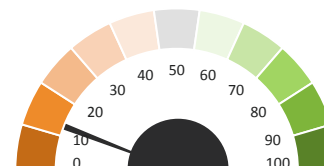
Sports pools

13%



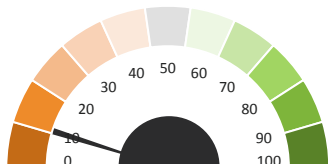
Sports wagers or bet on sports outcomes

12%



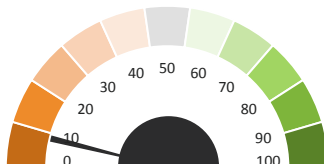
Betting on horse races

10%



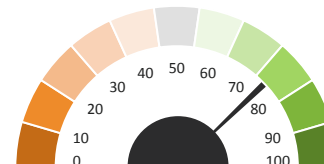
Fantasy sports contests

8%



None of the above

76%



Base: All respondents (n=2,001)

S6. Please indicate if you have participated in any of the following for REAL MONEY in the past year?

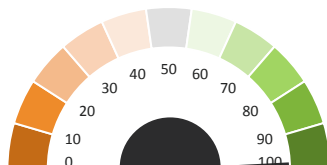
SPORTS BETTING LANDSCAPE AND FUTURE STATE

Sports Bettor's Past Year Sports Betting Participation (continued)

Real Money Participation – Sports Bettors % Yes

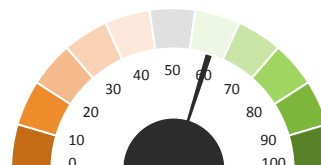
Sports wagers or bet
on sports outcomes

100%



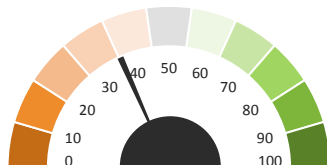
Sports pools

60%



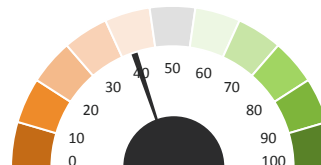
Betting on horse races

37%



Fantasy sports contests

40%



Base: Sports Bettors (n=236)

S6. Please indicate if you have participated in any of the following for REAL MONEY in the past year?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Non-Sports Bettors' Attitudes Towards Sports

% Agree
(Rated 5, 6, 7 on 7-point scale)

I take an active role in following professional sports



I enjoy being in fantasy sports for fun

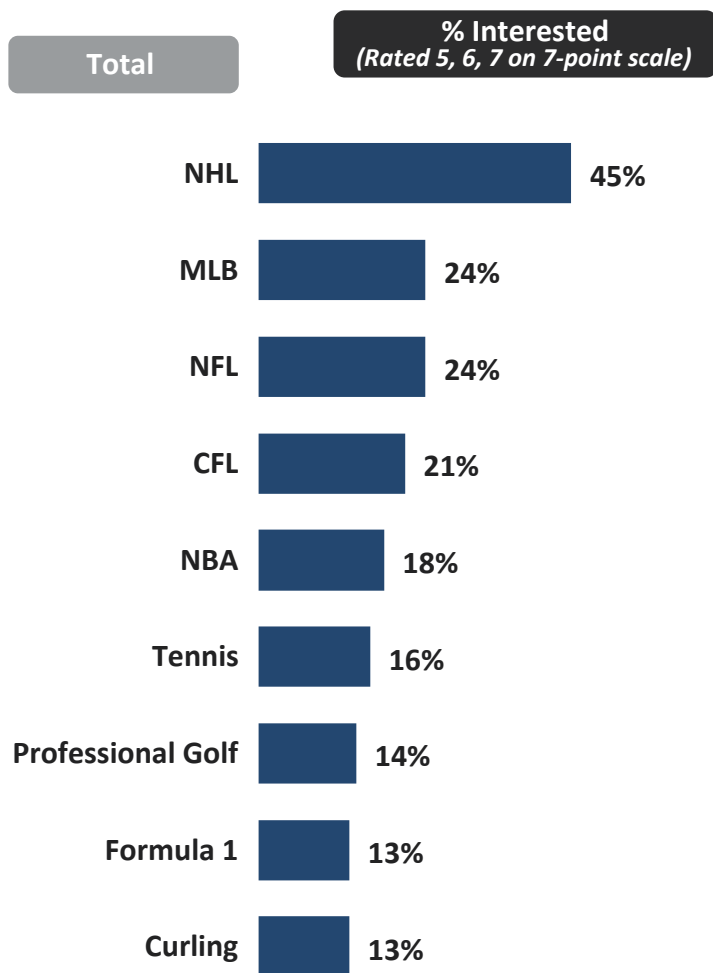


Base: Do not wager or bet on sports outcomes (n=1,765)

S7. Please indicate your level of agreement with the following statements. Please do so on a scale from 1 to 7 where "7" means you strongly agree, and "1" means you strongly disagree.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Appeal of Sports Leagues or Associations



% Interested (Rated 5, 6, 7 on 7-point scale)							
Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
54% B	40%	35%	42%	69%	71%	55%	46%
30% B	21%	15%	23% C	46%	41%	31%	26%
33% B	19%	16%	21%	54% F	39%	34%	27%
28% B	18%	9%	21% C	37%	35%	29%	23%
24% B	14%	15%	14%	37% F	28%	24%	21%
21% B	14%	11%	15%	28%	24%	23% H	12%
20% B	11%	4%	14% C	23%	21%	21% H	12%
16% B	11%	6%	13% C	22%	19%	19% H	7%
16% B	11%	4%	14% C	20%	20%	17% H	9%

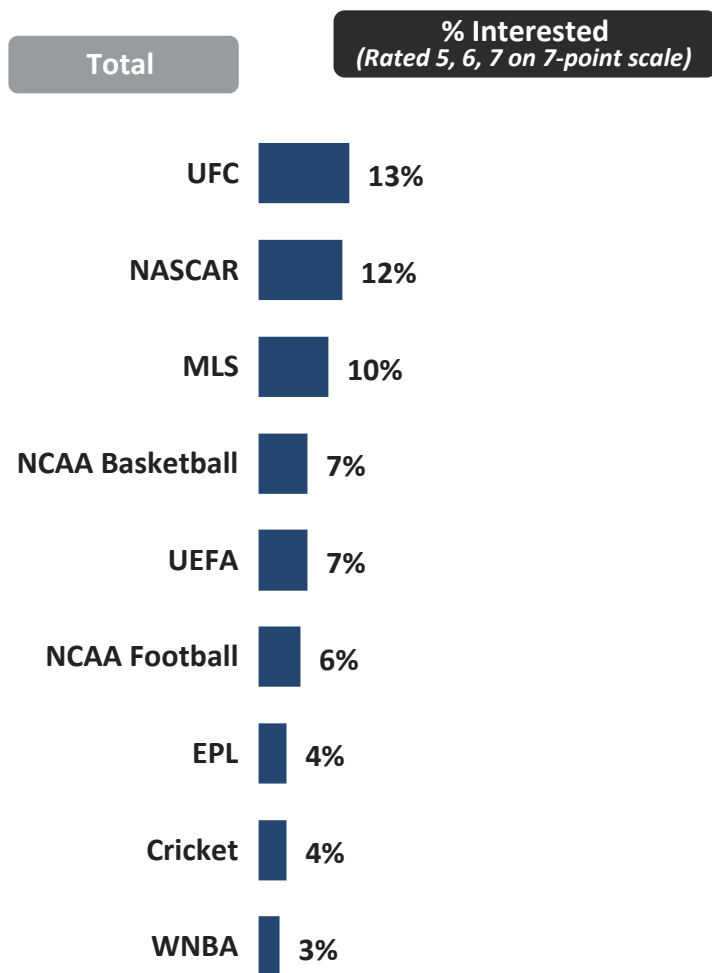
Base: All respondents (n=2,001)

E1a/b. Please indicate your level of interest in the following sports leagues/associations?

ABCDEFGH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Appeal of Sports Leagues or Associations (continued)



% Interested (Rated 5, 6, 7 on 7-point scale)							
Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
19% B	9%	11%	8%	26% F	16%	19%	17%
16% B	10%	6%	11% C	18%	18%	18% H	8%
15% B	7%	6%	8%	23% F	14%	16%	12%
11% B	5%	6%	4%	23% F	8%	11%	10%
11% B	4%	4%	4%	19% F	9%	11%	9%
10% B	4%	3%	5%	19% F	8%	10%	8%
6% B	3%	3%	4%	13% F	6%	6%	6%
5%	4%	3%	4%	9% F	3%	6%	4%
5% B	2%	3%	2%	10% F	3%	6%	2%

Base: All respondents (n=2,001)

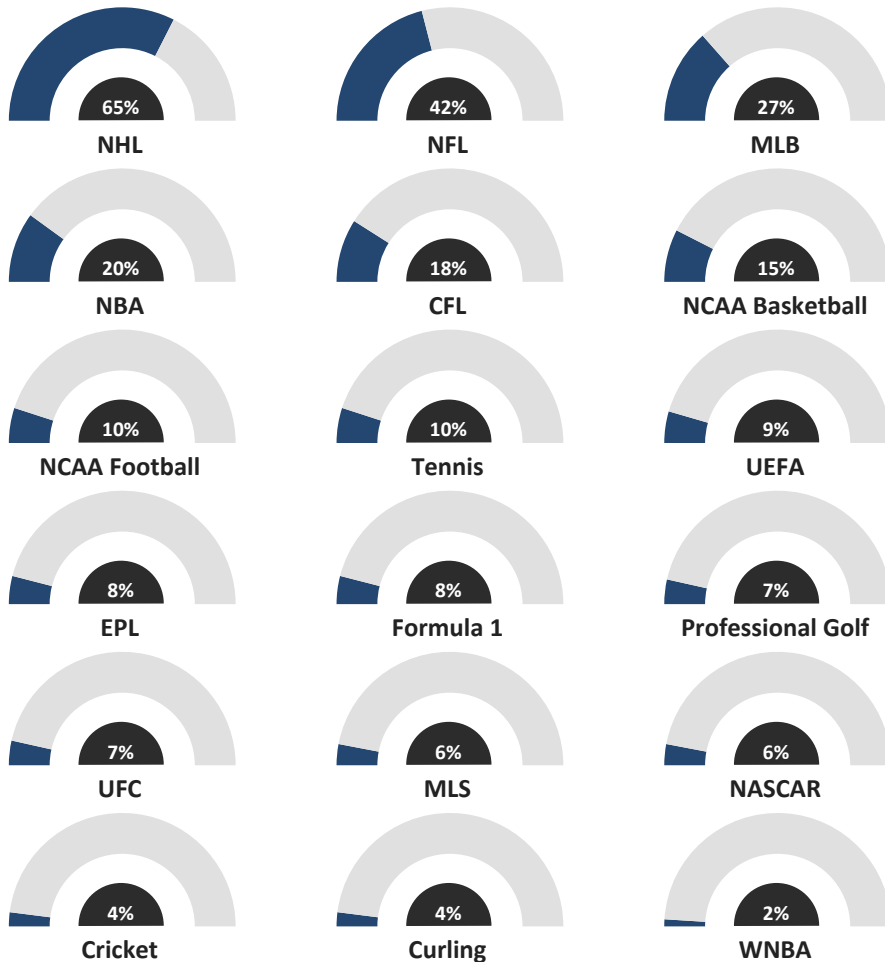
E1a/b. Please indicate your level of interest in the following sports leagues/associations?

ABCDEFGH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Sports Leagues or Associations Betting

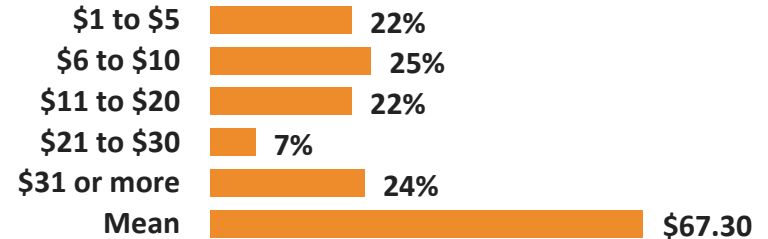
Made Bet in Past Year



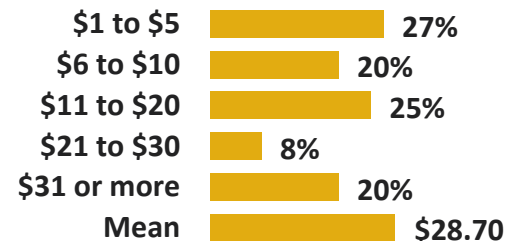
Base: Sports Bettors (n=236)

QE2. Which of the following sporting leagues have you made a bet on in the past year? This could be a futures bet, a bet on the outcome of the game/match, or a prop bet.

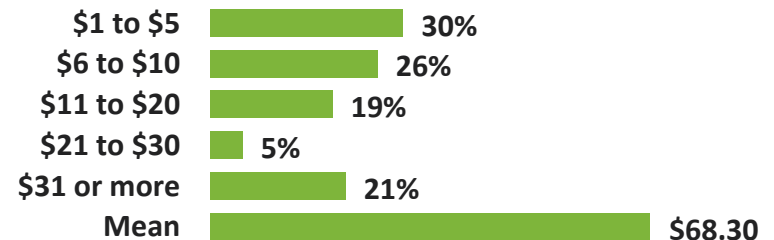
NHL (n=154)



NFL (n=100)



MLB (n=64)*



Note: Leagues with base (n<50) not shown.

Base: Made a bet in sports league * Small base size, interpret with caution.

E3a/E3b. Thinking about a typical game or match that you would bet on for the following sports/leagues, what is the average size of the wager you would make?

Sports Leagues or Associations Where Bet Made in Past Year

Mean Wager
\$67.30

NHL

Mean Wager
\$28.70

NFL

Professional Golf

MLS

NCAA Basketball

NBA

UEFA

NCAA Football

Cricket

WNBA

CFL

Tennis

Curling

Mean Wager
\$68.30

MLB

UFC EPL

Base: Sports Bettors (n=236)

QE2. Which of the following sporting leagues have you made a bet on in the past year?
This could be a futures bet, a bet on the outcome of the game/match, or a prop bet.

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Note: Leagues with base (n<50) not shown.

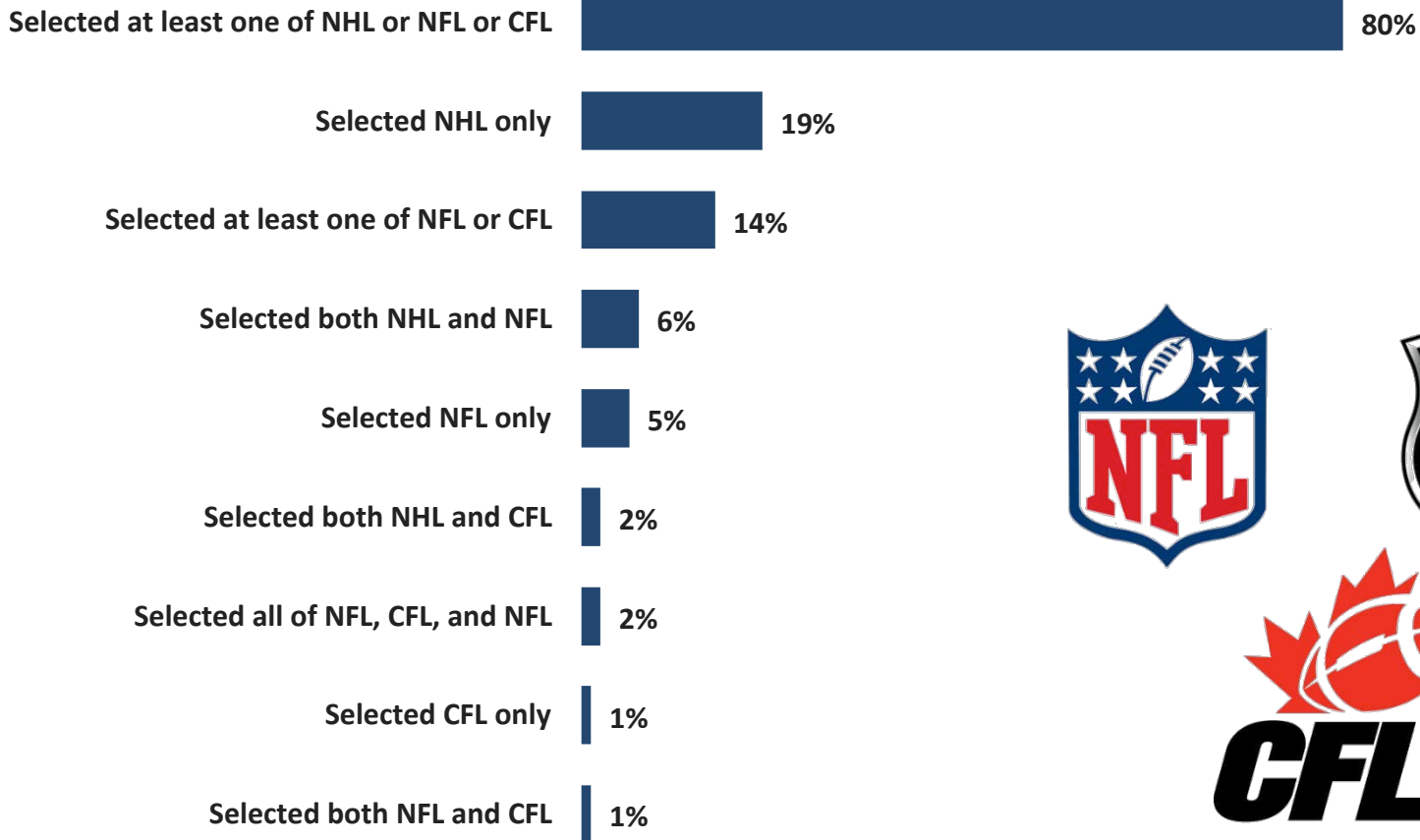
Base: Made a bet in sports league * Small base size, interpret with caution.

E3a/E3b. Thinking about a typical game or match that you would bet on for the following sports/leagues, what is the average size of the wager you would make?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Sports Leagues or Associations Betting (continued)

Made Bet in Past Year



Base: Sports Bettors (n=236)

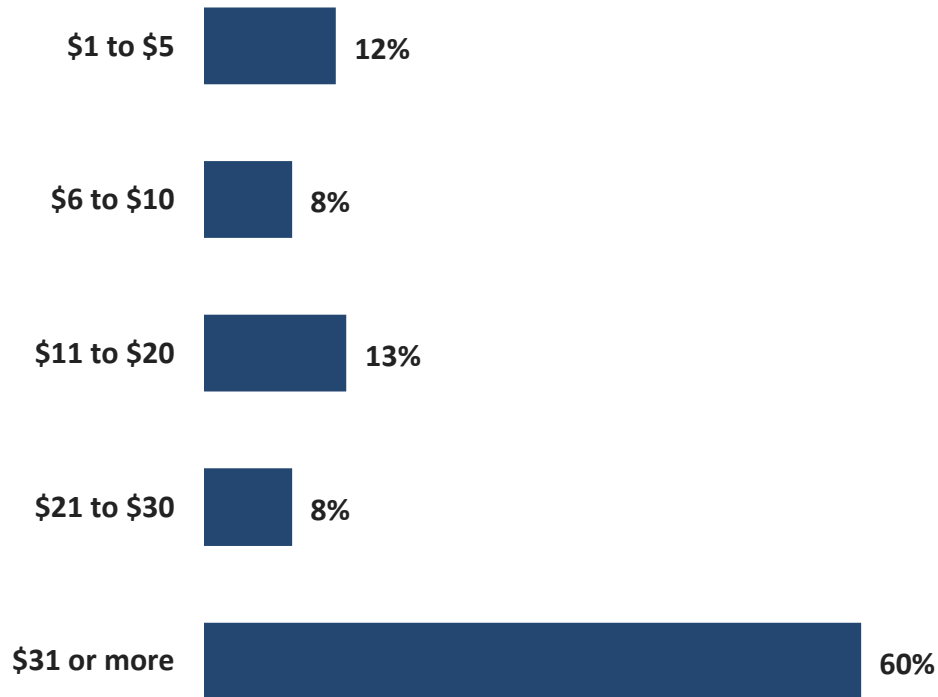
QE2. Which of the following sporting leagues have you made a bet on in the past year? This could be a futures bet, a bet on the outcome of the game/match, or a prop bet.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Past Year Sports Leagues or Associations Betting



NFL



Median Bet Amount

\$50

Mean Bet Amount

\$154

Base: Made a bet on sports league in past year (n=100)

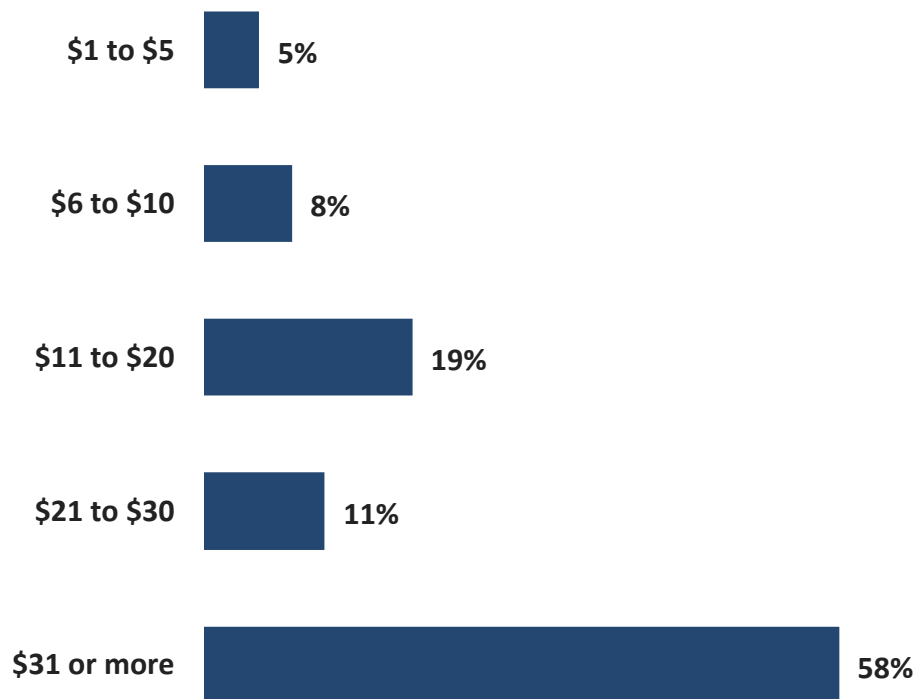
E4a/b. For example, if I bet \$20 on game A and the bet was successful, and then I bet \$30 on game B, I have bet \$50 in total. Indicate the total amount you have wagered here. If you are unsure of the amounts, please make your best estimate.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Past Year Sports Leagues or Associations Betting (continued)



NHL



Median Bet Amount

\$50

Mean Bet Amount

\$93

Base: Made a bet on sports league in past year (n=154)

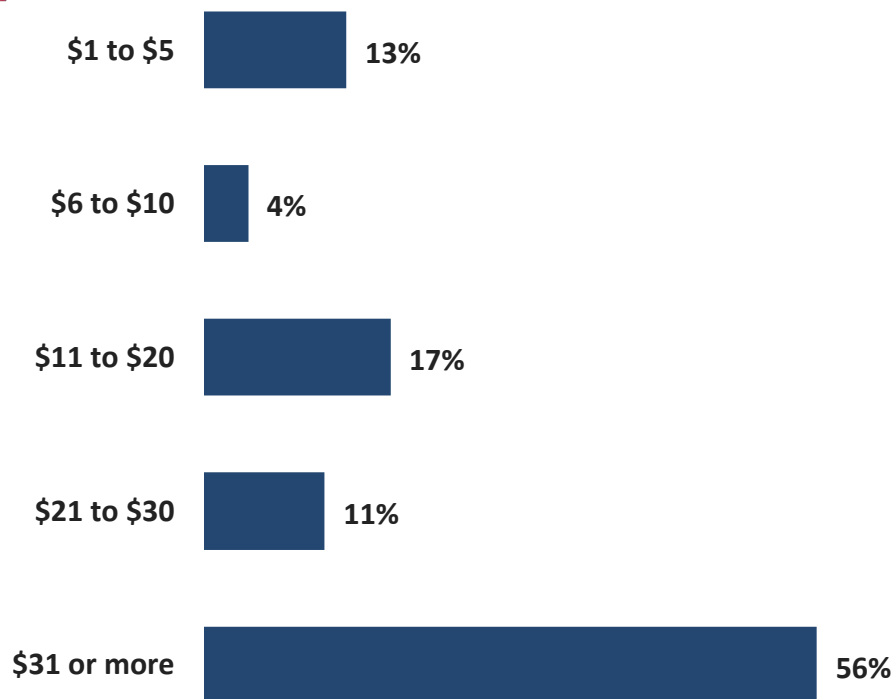
E4a/b. For example, if I bet \$20 on game A and the bet was successful, and then I bet \$30 on game B, I have bet \$50 in total. Indicate the total amount you have wagered here. If you are unsure of the amounts, please make your best estimate.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Past Year Sports Leagues or Associations Betting (continued)



MLB



Median Bet Amount

\$50

Mean Bet Amount

\$125

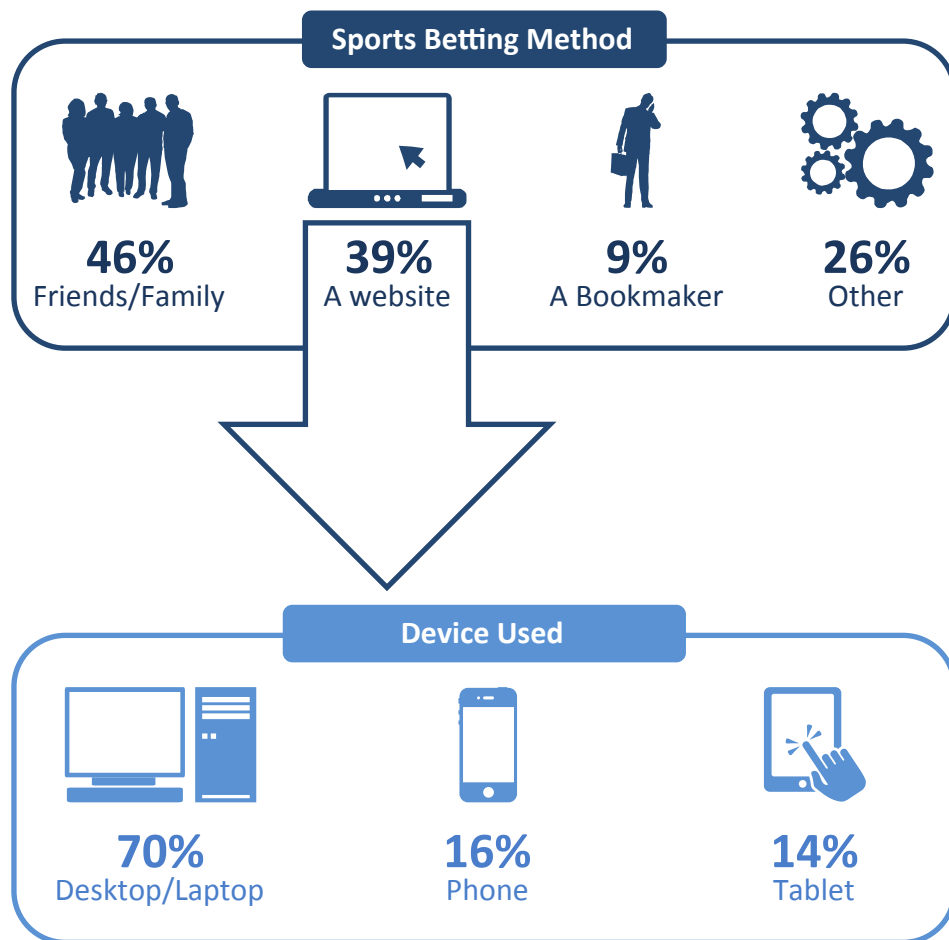
* Small base size, interpret with caution.

Base: Made a bet on sports league in past year (n=64)*

E4a/b. For example, if I bet \$20 on game A and the bet was successful, and then I bet \$30 on game B, I have bet \$50 in total. Indicate the total amount you have wagered here. If you are unsure of the amounts, please make your best estimate.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Method of Placing Sports Bets



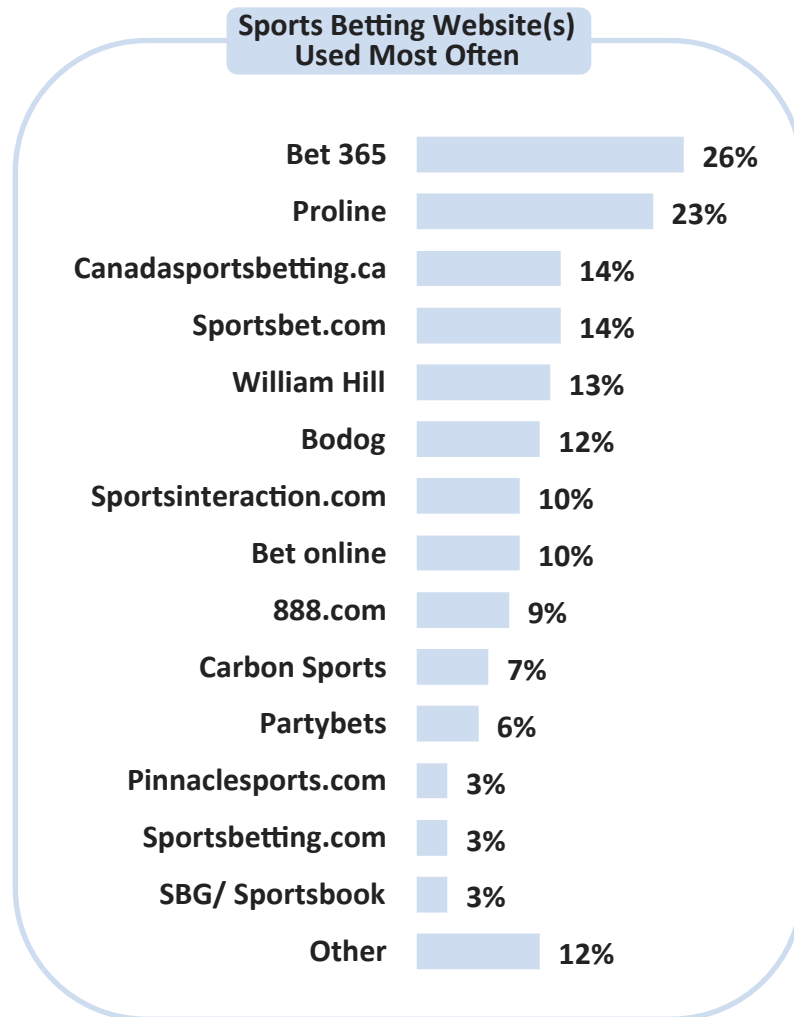
Base: Sports Bettors (n=236)

E5. How do you place bets on sports?

Base: Place bets on a website (n=91)*

* Small base size, interpret with caution.

E6. You indicated you have placed a bet on sports on a website. Thinking about the total amount of bets you have made in the past year, what percentage of your bets were made on a.....?

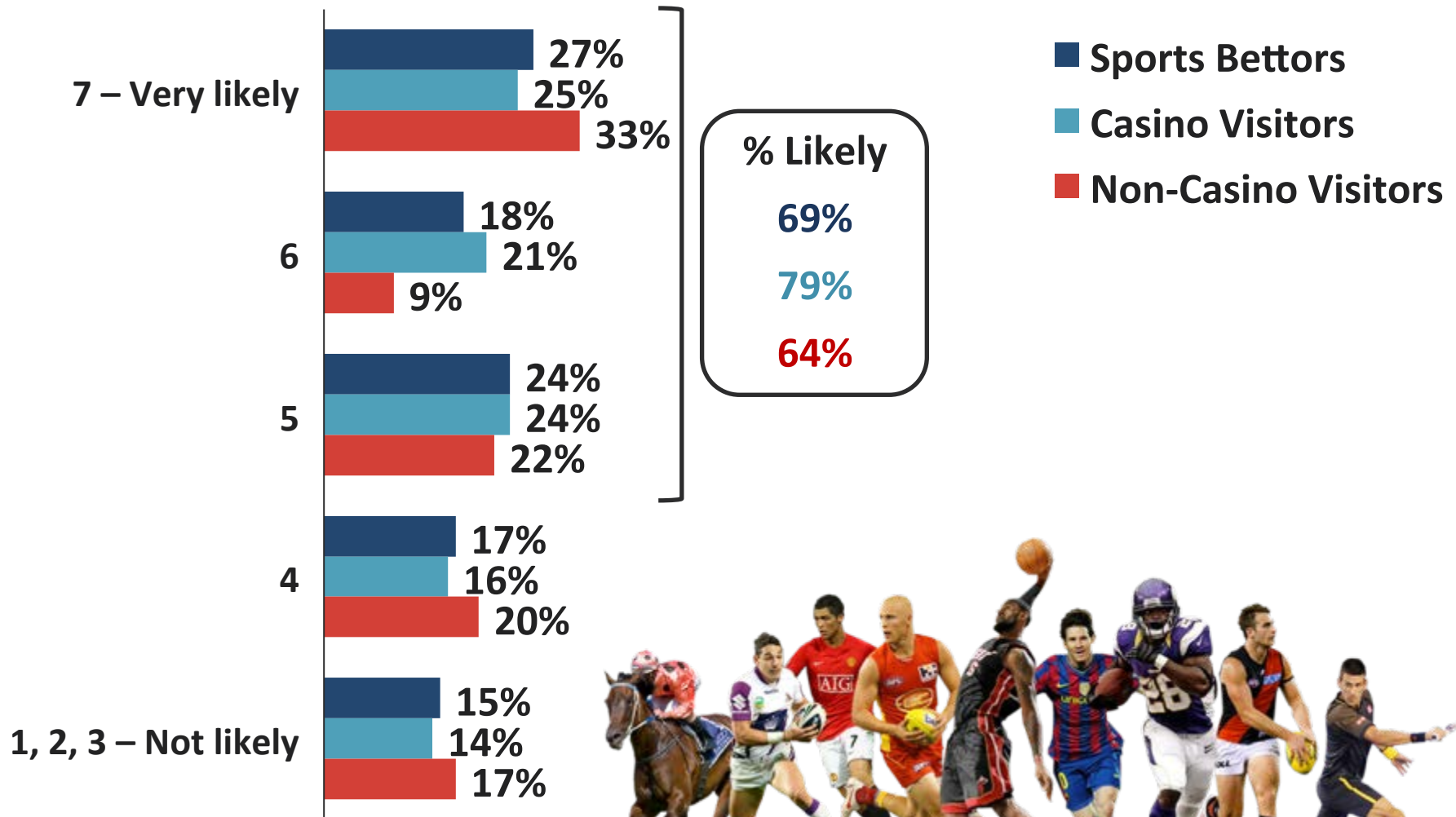


Base: Place bets on a website (n=91)*

QE7. Which sports betting websites do you use for sports betting most often?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Likelihood of Betting on Sports Game Next Year



Base: Sports bettors (n=236)

E8. How likely are you to make a bet in the next year on a sports match/game/outcome?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Appeal of Casino/CGC Dedicated Sports Betting Area



19%

Find a dedicated sports betting area within a Casino/CGC appealing.

30%

Visitors

12%

Non-Visitors

13%

Non-Visitors
18-34

12%

Non-Visitors
35+

49%

Sports
Bettors

27%

Non-Sports
Bettors

32%

Slot
Players

19%

Non-Slot
Players

Base: All respondents (n=2,001)

E9. How appealing is an area within a casino/community gaming centre in the province where you live that would be dedicated to betting on sports?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Appeal of Casino/CGC Dedicated Sports Betting Area

Total

7 - Very appealing

4%

6

5%

5

10%

4

16%

3

9%

2

13%

1 - Not at all appealing

44%

Top 3 %
Appealing
19%

Bot 3 % Not
Appealing
66%

Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
30% B	12%	13%	12%	49% F	27%	32% H	19%
20% B	13%	16%	12%	25%	22%	21%	15%
51%	75% A	71%	76%	26%	51% E	47%	66% G

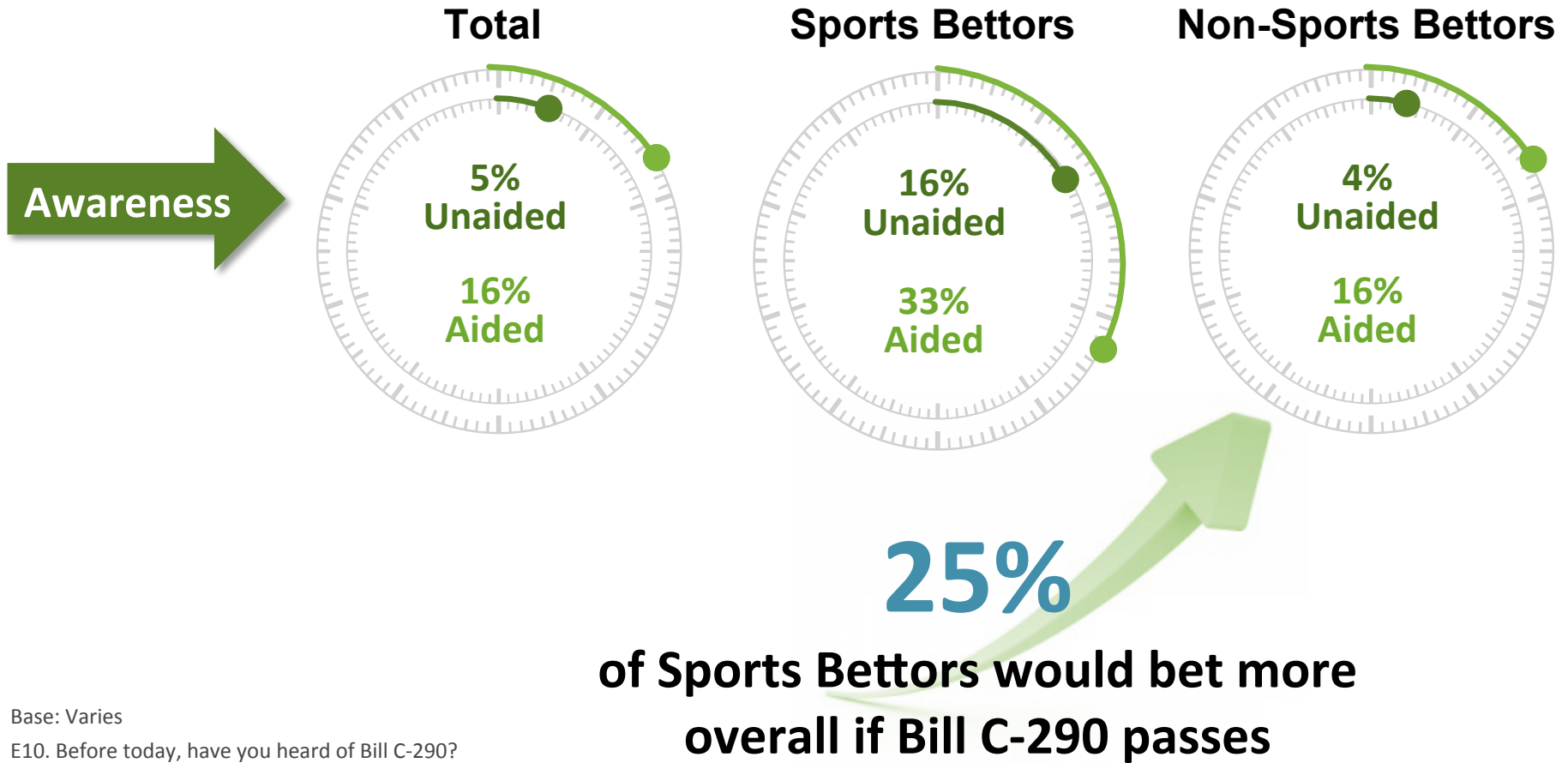
Base: All respondents (n=2,001)

E9. How appealing is an area within a casino/community gaming centre in the province where you live that would be dedicated to betting on sports?

ABCDEF GH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Bill C-290



Base: Varies

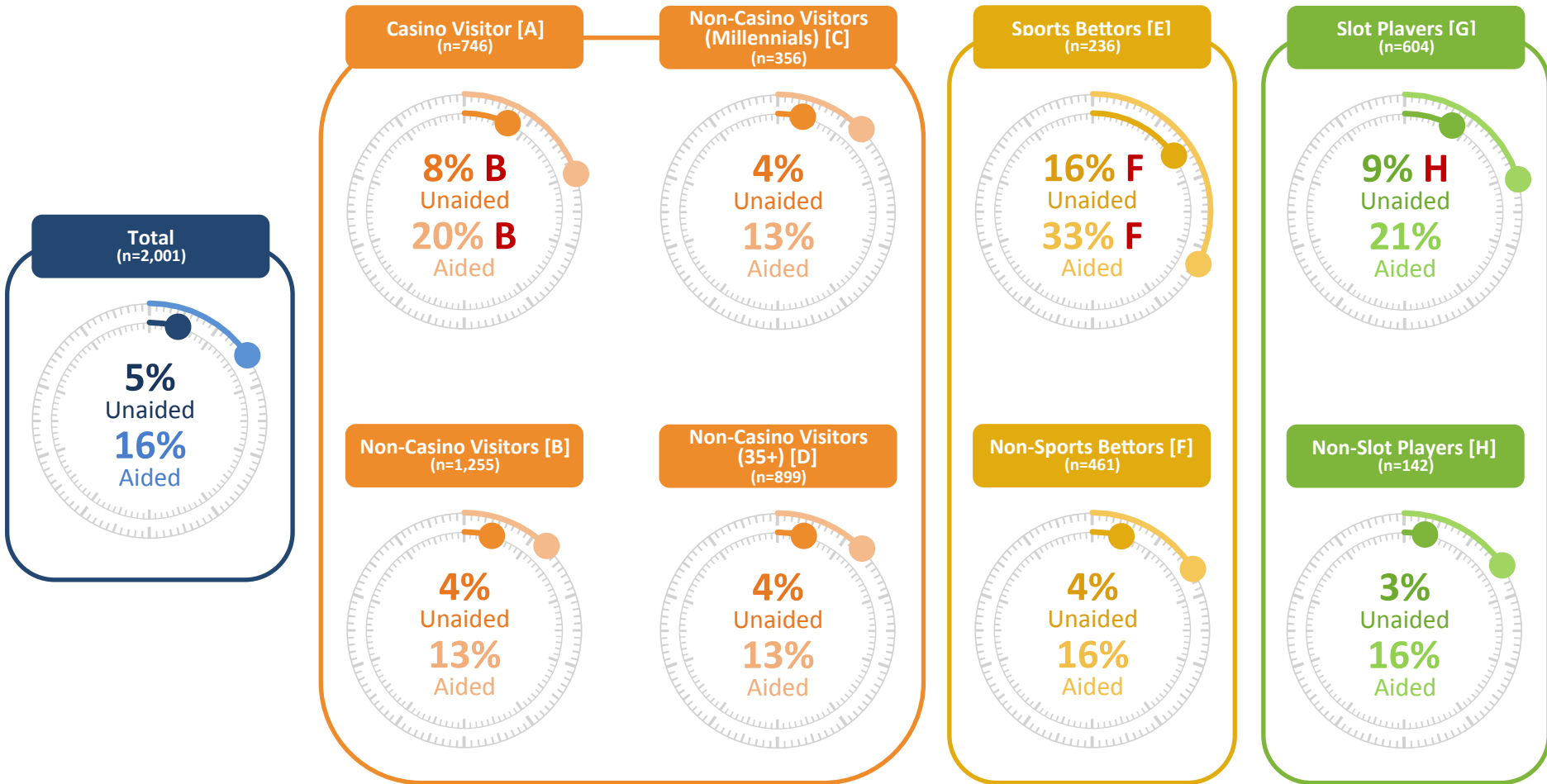
E10. Before today, have you heard of Bill C-290?

E11. Bill C-290 was a bill before the Senate during the previous Harper Government to allow for wagering on the outcome of a single sporting event, which is currently illegal in Canada. Based on this description, have you heard of Bill C-290?

E13. If this bill were to pass, allowing you to legally bet in Canada on single outcomes for a sporting event, how likely would you be to start making bets on sports events/games?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Awareness of Bill C-290



Base: All respondents

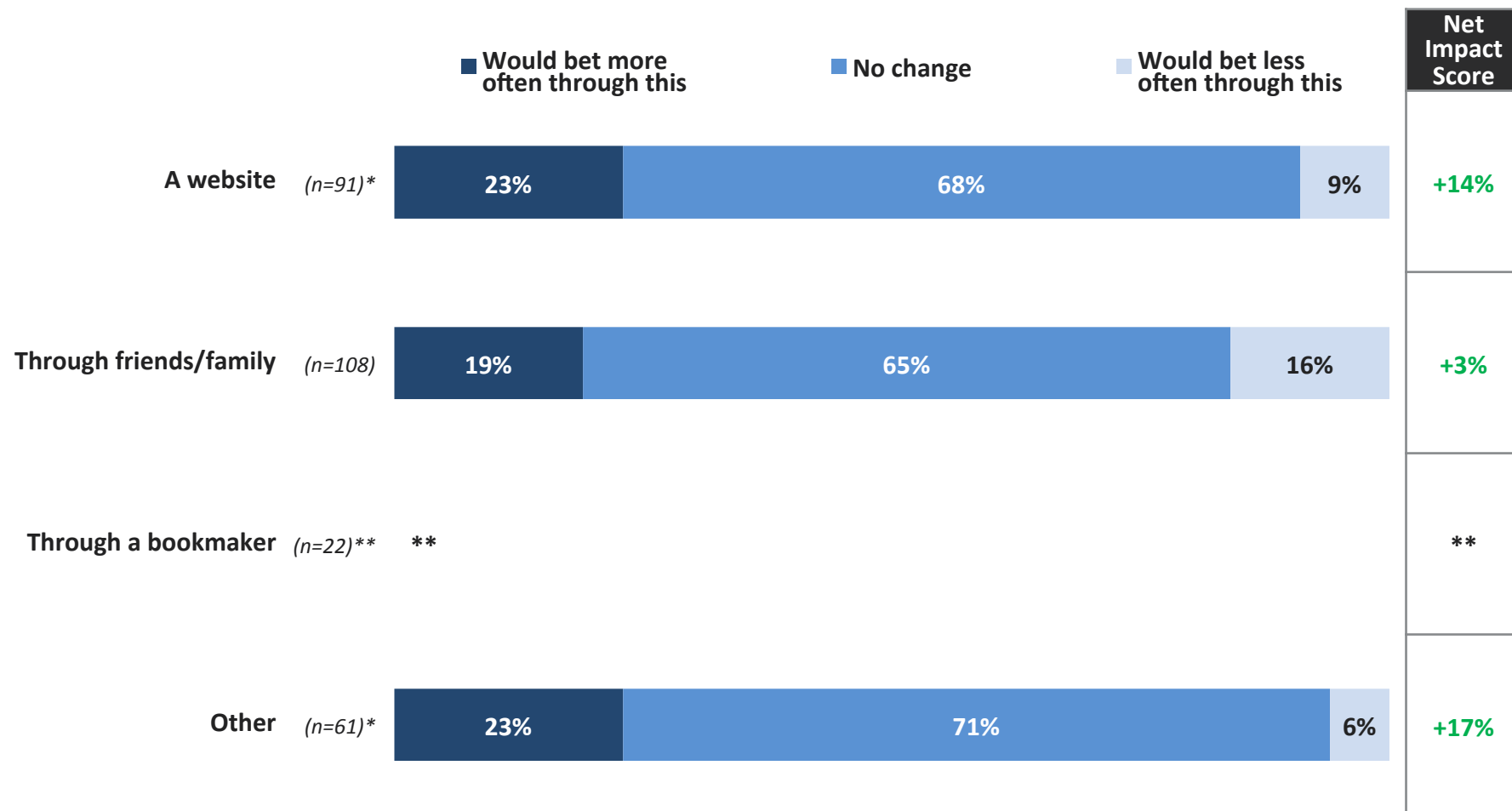
E10. Before today, have you heard of Bill C-290?

E11. Bill C-290 was a bill before the Senate during the previous Harper Government to allow for wagering on the outcome of a single sporting event, which is currently illegal in Canada. Based on this description, have you heard of Bill C-290?

ABCDEFH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Impact of Single Outcome Betting on Betting Behaviour



* Small base size, interpret with caution.

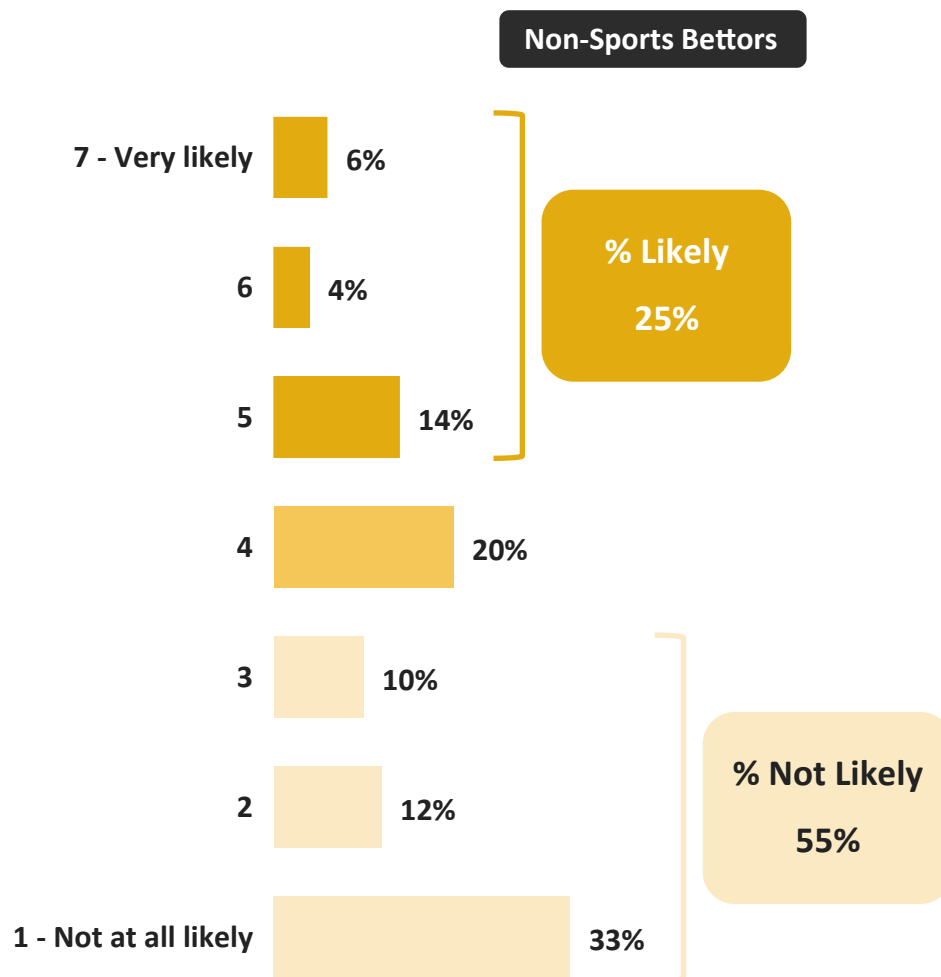
** Base too small to report.

Base: Sports bettors who bet on [INSERT OPTION]

E12. A similar bill is now before the current senate. If this bill were to pass, allowing you to legally bet in Canada on single outcomes for a sporting event, how would betting through these existing betting options be impacted?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Likelihood of Betting on Sports Game with Bill C-290



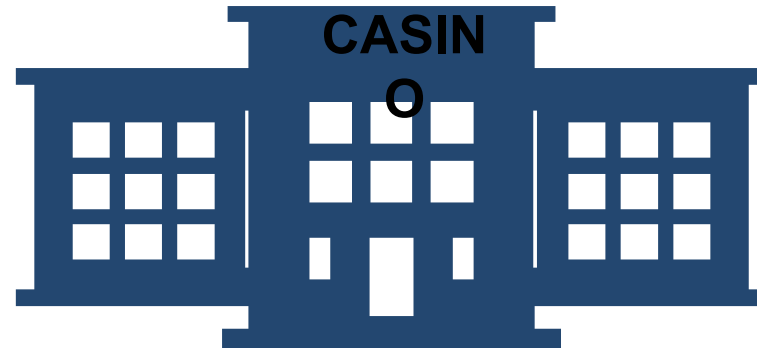
Base: Non-Sports bettors (n=461)

E13. If this bill were to pass, allowing you to legally bet in Canada on single outcomes for a sporting event, how likely would you be to start making bets on sports events/games?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Impact of Single Outcome Sports Bets on Casino Visitation

8% would visit
casinos more often if
there was a
sportsbook area



13%

**Casino
Visitors**

4%

**Non-Casino
Visitors**

6%

**Non-Casino
Visitor
Millennials**

4%

**Non-Casino
Visitor
35+**

27%

**Sports
Bettors**

12%

**Non-Sports
Bettors**

14%

**Slot
Players**

9%

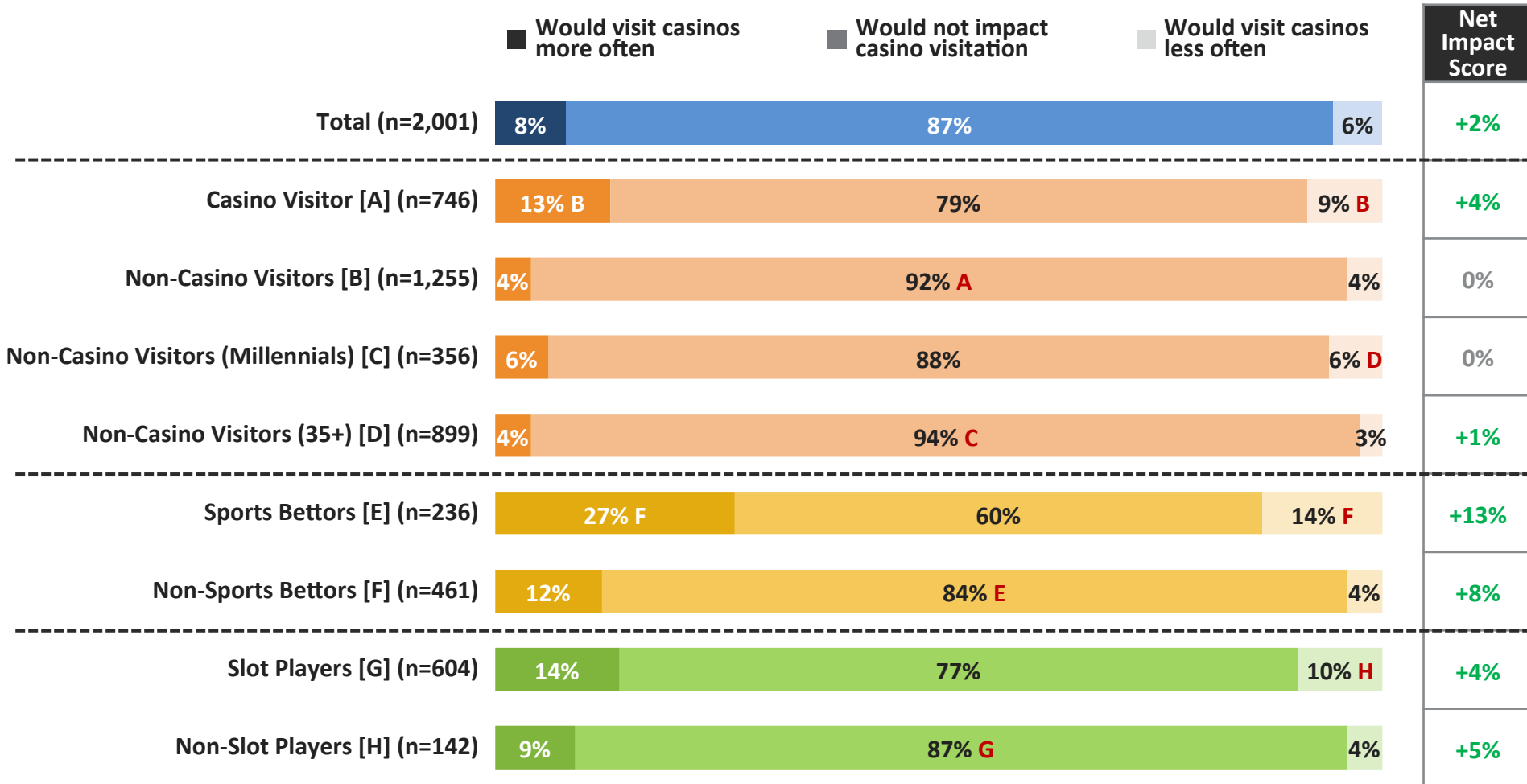
**Non-Slot
Players**

Base: All respondents

E14. If casinos were to offer a sportsbook area, that allowed you to make single outcome sports bets, how would this impact your visitation to casinos in the province where you live?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Impact of Single Outcome Sports Bets on Casino Visitation



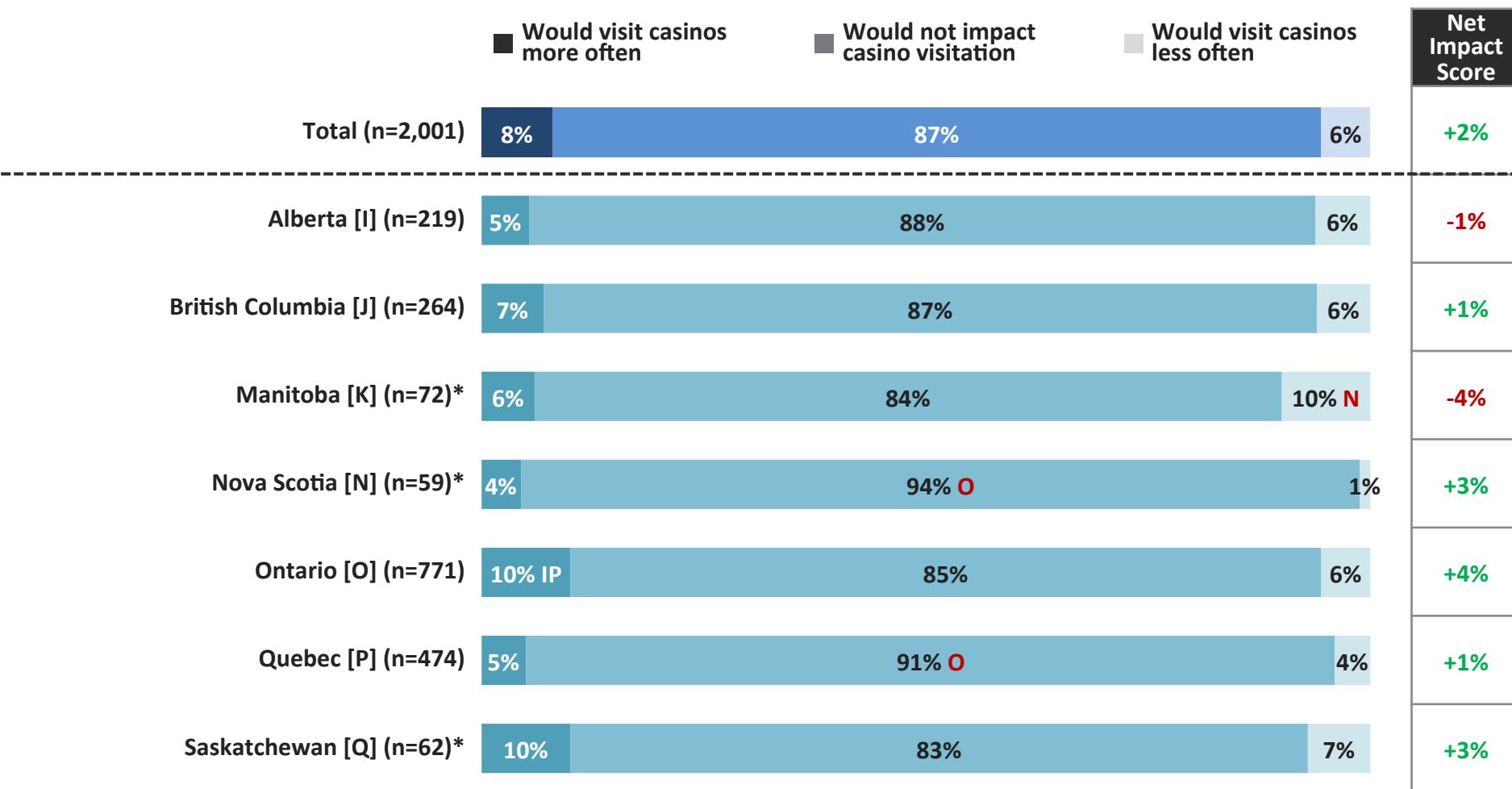
Base: All respondents

E14. If casinos were to offer a sportsbook area, that allowed you to make single outcome sports bets, how would this impact your visitation to casinos in the province where you live?

ABCDEFGH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Impact of Single Outcome Sports Bets on Casino Visitation



Note: New Brunswick and Newfoundland and Labrador base size too small to show (n<50).

Base: All respondents

* Small base size, interpret with caution.

E14. If casinos were to offer a sportsbook area, that allowed you to make single outcome sports bets, how would this impact your visitation to casinos in the province where you live?

IJKLMNOPQ Significantly higher than other subgroup.

Appeal of a Dedicated Sports Betting Area



18%

Find a dedicated sports betting area in some sports bars in Canada appealing.

29%

Visitors

11%

Non-Visitors

12%

Non-Visitors
18-34

10%

Non-Visitors
35+

56%

Sports
Bettors

27%

Non-Sports
Bettors

31%

Slot
Players

20%

Non-Slot
Players

Base: All respondents (n=2,001)

E15. Should Bill C-221 pass, it is likely that some sports bars in Canada could provide a dedicated sports betting area, where patrons could place wagers on sporting outcomes. How appealing is this idea?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Appeal of a Dedicated Sports Betting Area

Total

7 - Very appealing

4%

6

4%

5

10%

4

16%

3

9%

2

10%

1 - Not at all appealing

46%

% Appealing

18%

% Not
Appealing

66%

Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
29% B	11%	12%	10%	56% F	27%	31% H	20%
22% B	13%	18% D	11%	24%	21%	23%	19%
49%	76% A	71%	78% C	20%	52% E	46%	61% G

Base: All respondents (n=2,001)

E15. Should Bill C-221 pass, it is likely that some sports bars in Canada could provide a dedicated sports betting area, where patrons could place wagers on sporting outcomes. How appealing is this idea?

ABCDEF GH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Impact of Dedicated Sports Betting Area on Likelihood to Visit a Sports Bar in Canada



16%

Are likely to visit a sports bar in Canada that provides a dedicated sports betting area

27%

Visitors

9%

Non-Visitors

10%

**Non-Visitors
18-34**

9%

**Non-Visitors
35+**

51%

**Sports
Bettors**

25%

**Non-Sports
Bettors**

30%

**Slot
Players**

17%

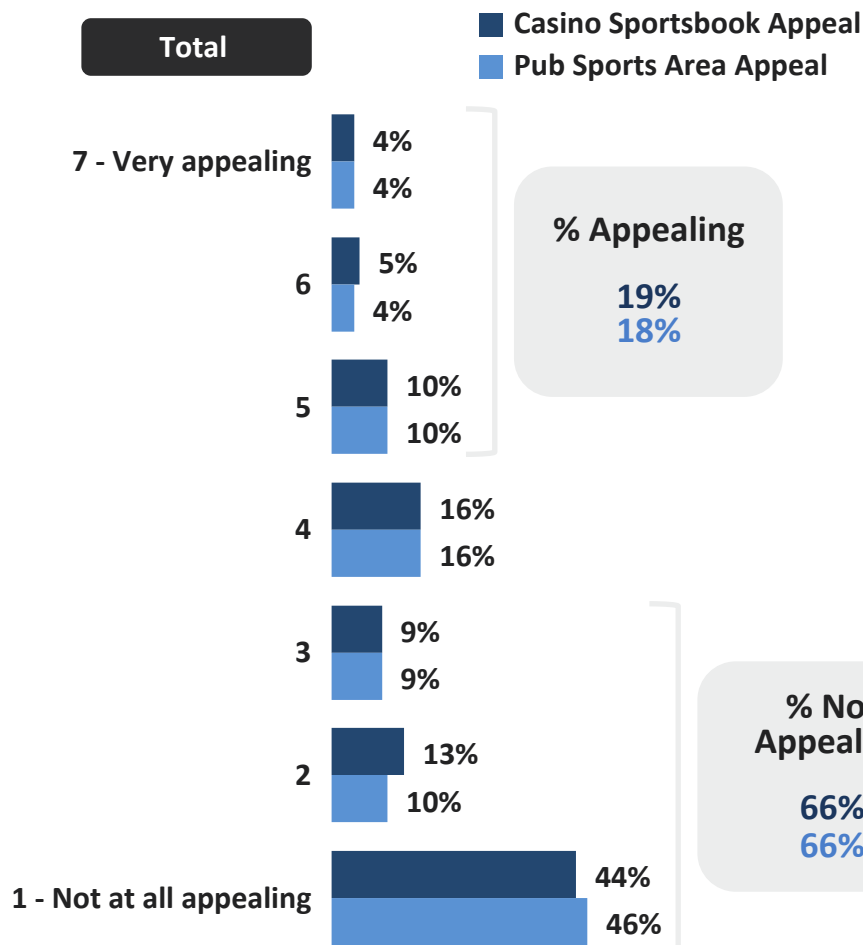
**Non-Slot
Players**

Base: All respondents (n=2,001)

E16. How likely would you be to visit a sports bar in Canada that provided a dedicated sports betting area?

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Appeal of Casino/CGC Dedicated Sports Betting Area



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
30% B 29% B	12% 11%	13% 12%	12% 10%	49% F 56% F	27% 27%	32% H 31% H	19% 20%
20% B 22% B	13% 13%	16% 18% D	12% 11%	25% 24%	22% 21%	21% 23%	15% 19%
51% 49%	75% A 76% A	71% 71%	76% 78% C	26% 20%	51% E 52% E	47% 46%	66% G 61% G

Base: All respondents (n=2,001)

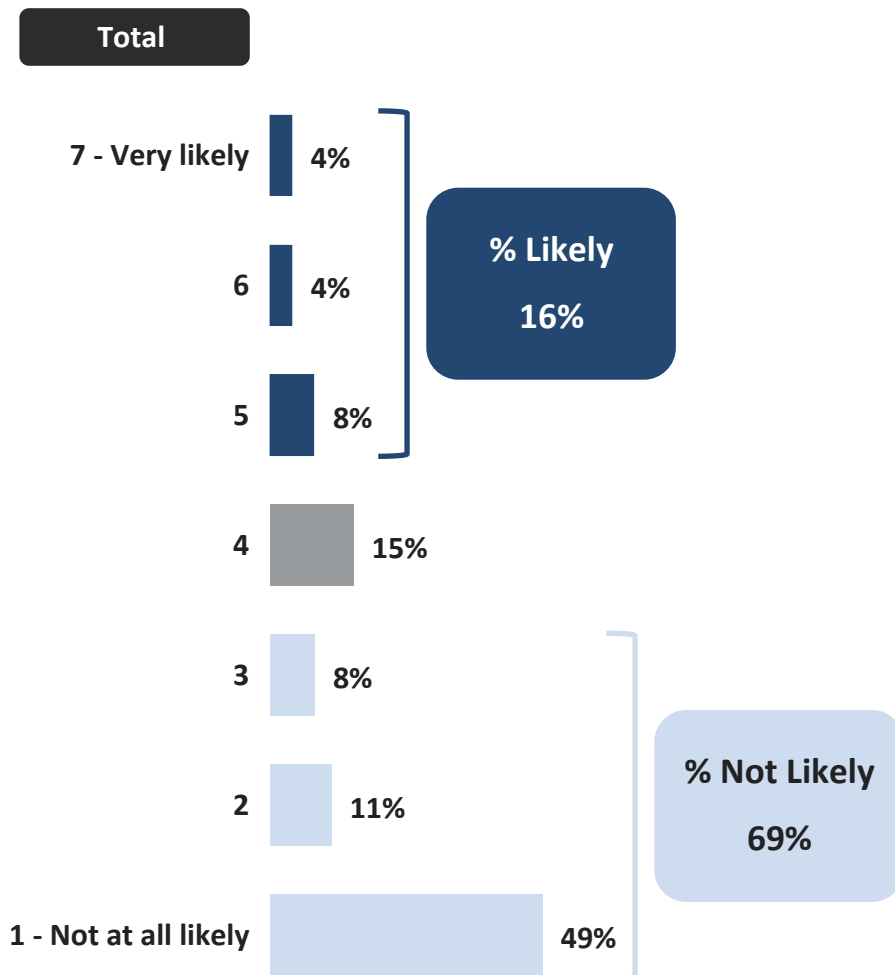
E9. How appealing is an area within a casino/community gaming centre in the province where you live that would be dedicated to betting on sports?

E15. Should Bill C-221 pass, it is likely that some sports bars in Canada could provide a dedicated sports betting area, where patrons could place wagers on sporting outcomes. How appealing is this idea?

ABCDEF GH Significantly higher than other subgroup.

SPORTS BETTING LANDSCAPE AND FUTURE STATE

Impact of Dedicated Sports Betting Area on Likelihood to Visit a Sports Bar in Canada



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
27% B	9%	10%	9%	51% F	25%	30% H	17%
22% B	12%	16% D	10%	28% F	19%	23%	16%
51%	79% A	74%	81% C	21%	56% E	47%	67% G

Base: All respondents (n=2,001)

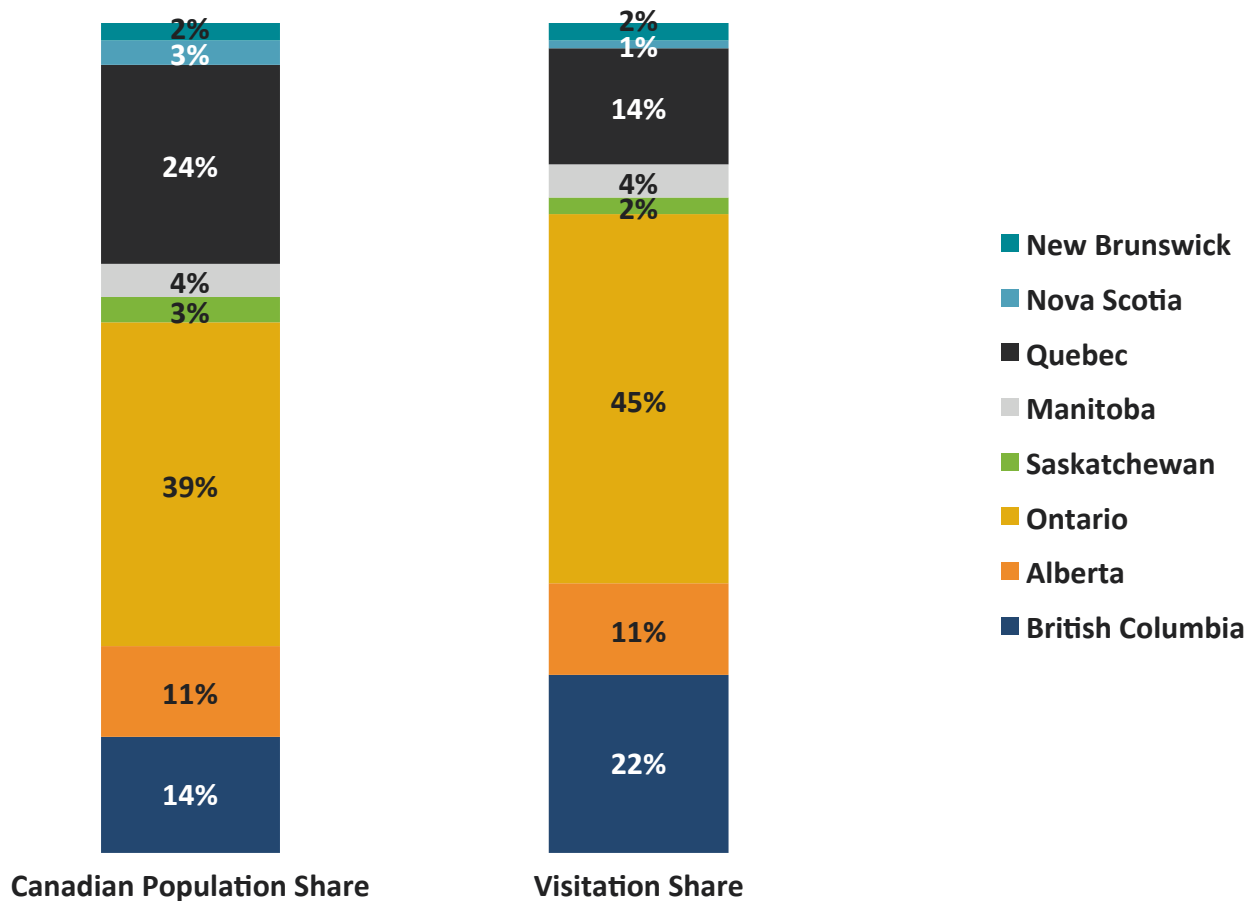
E16. How likely would you be to visit a sports bar in Canada that provided a dedicated sports betting area?

ABCDEF GH Significantly higher than other subgroup.

APPENDIX

Past Year Casino/CGC Visitation (continued)

Population vs. Visitation

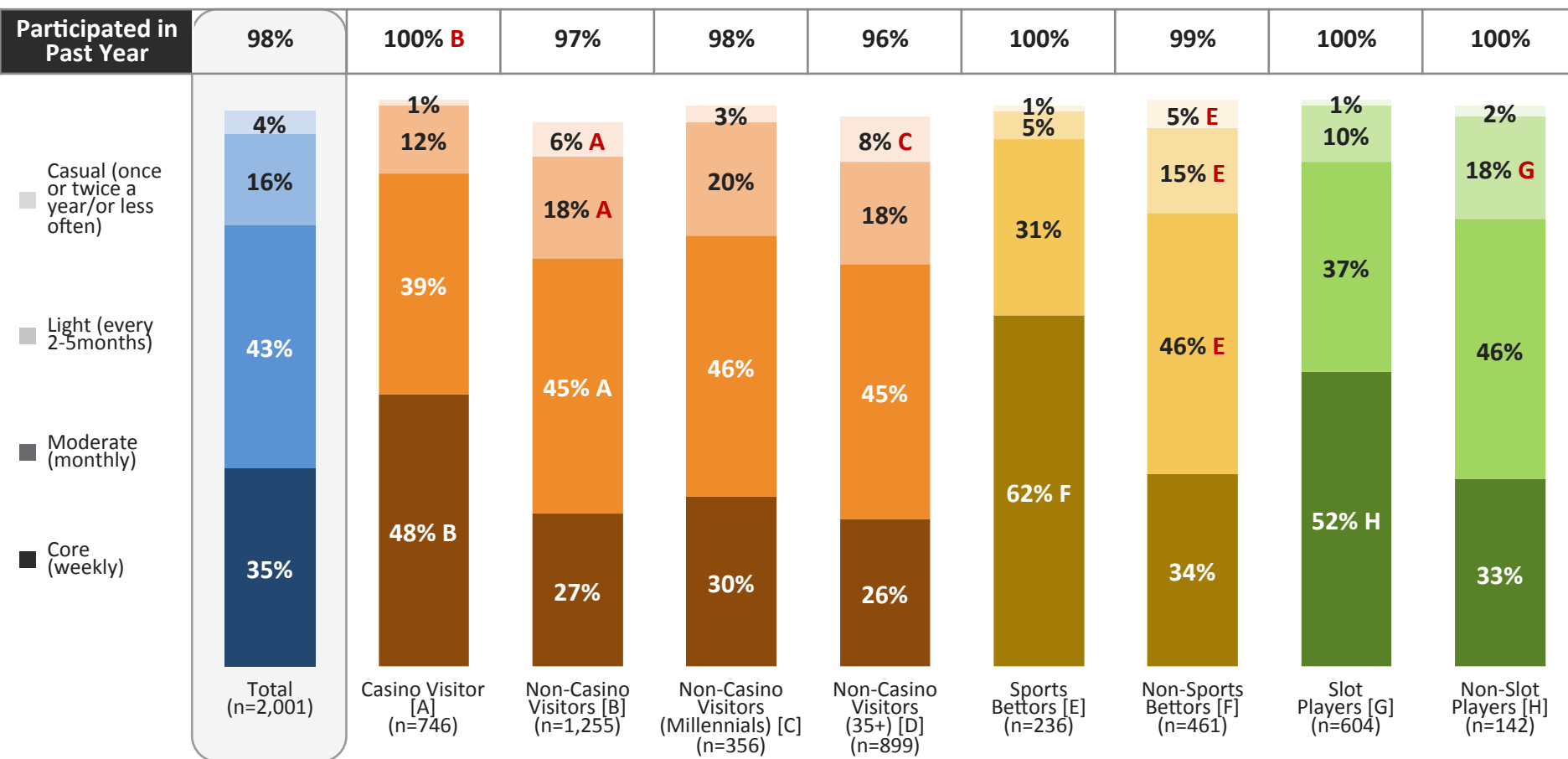


Base: Aware of [INSERT CASINO] and has visited casinos in past year

A7. In the past year, how many times did you visit each of the following casino/community gaming centres in the province where you live?

Activity and Frequency of Participation

Any Activity (Net)



Base: All respondents

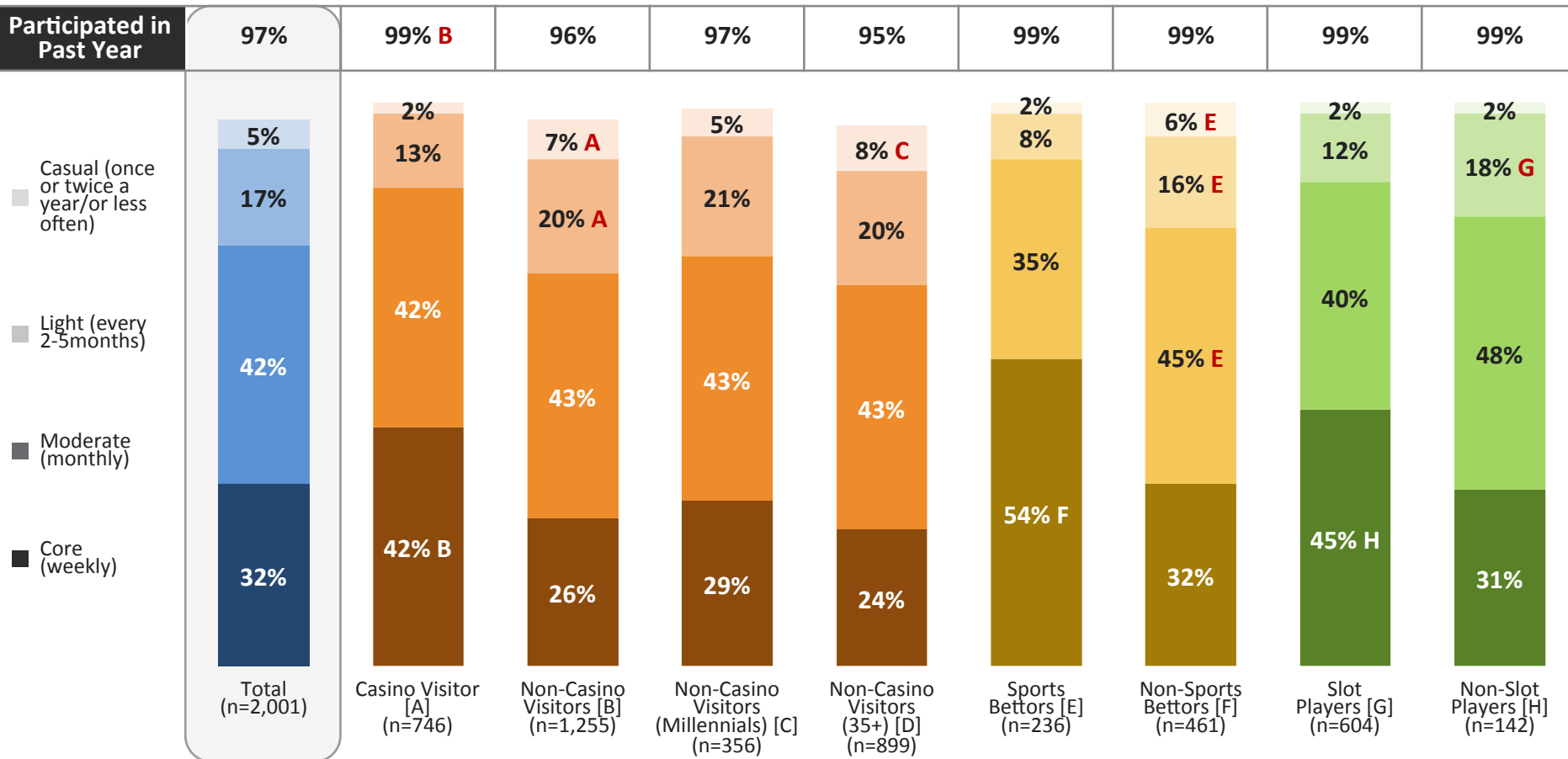
S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

ABCDEF GH Significantly higher than other subgroup.

Activity and Frequency of Participation (continued)

Dined out at a restaurant



Base: All respondents

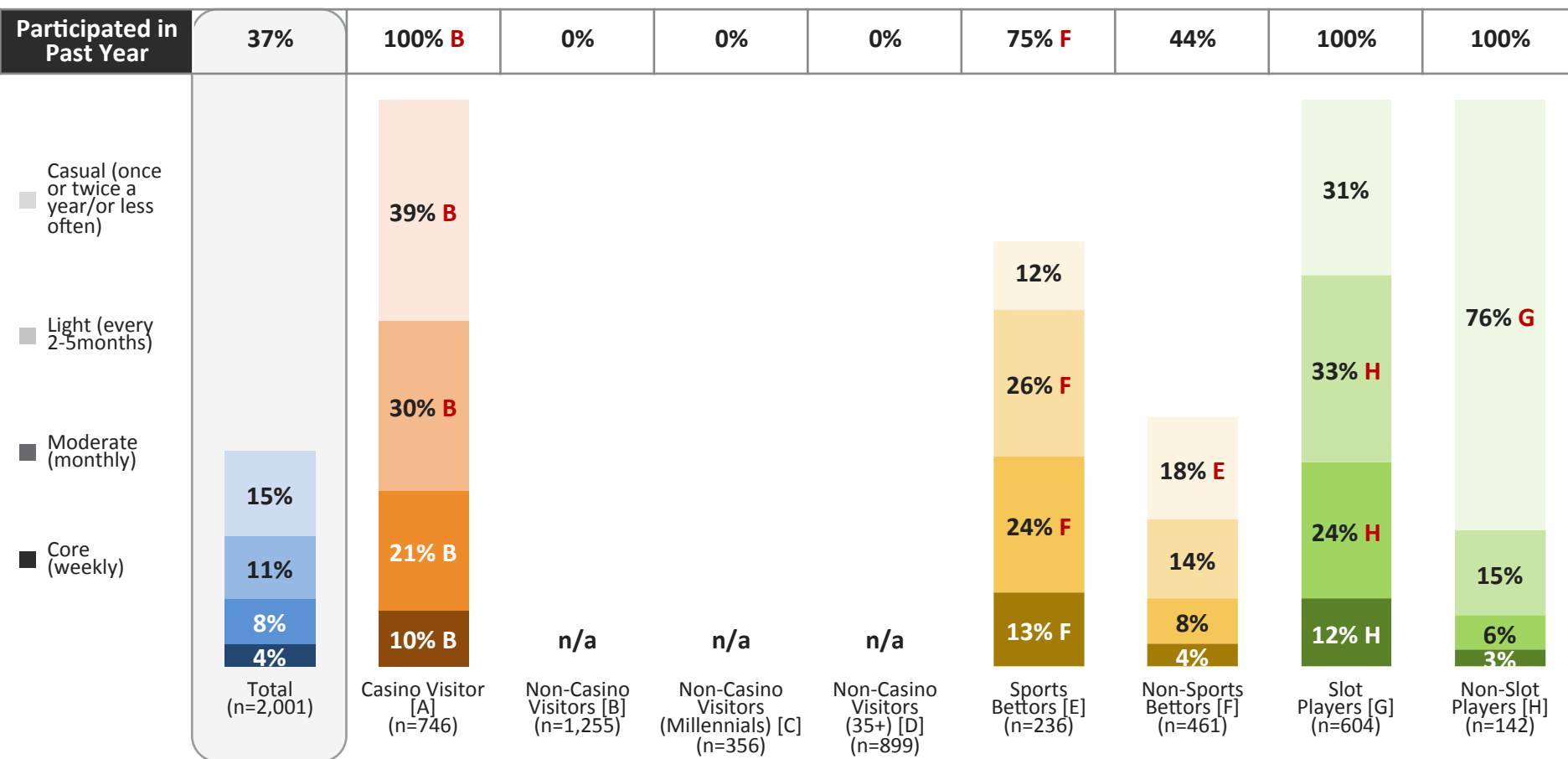
S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

ABCDEF GH Significantly higher than other subgroup.

Activity and Frequency of Participation (continued)

Gambled at a casino/community gaming centre



Base: All respondents

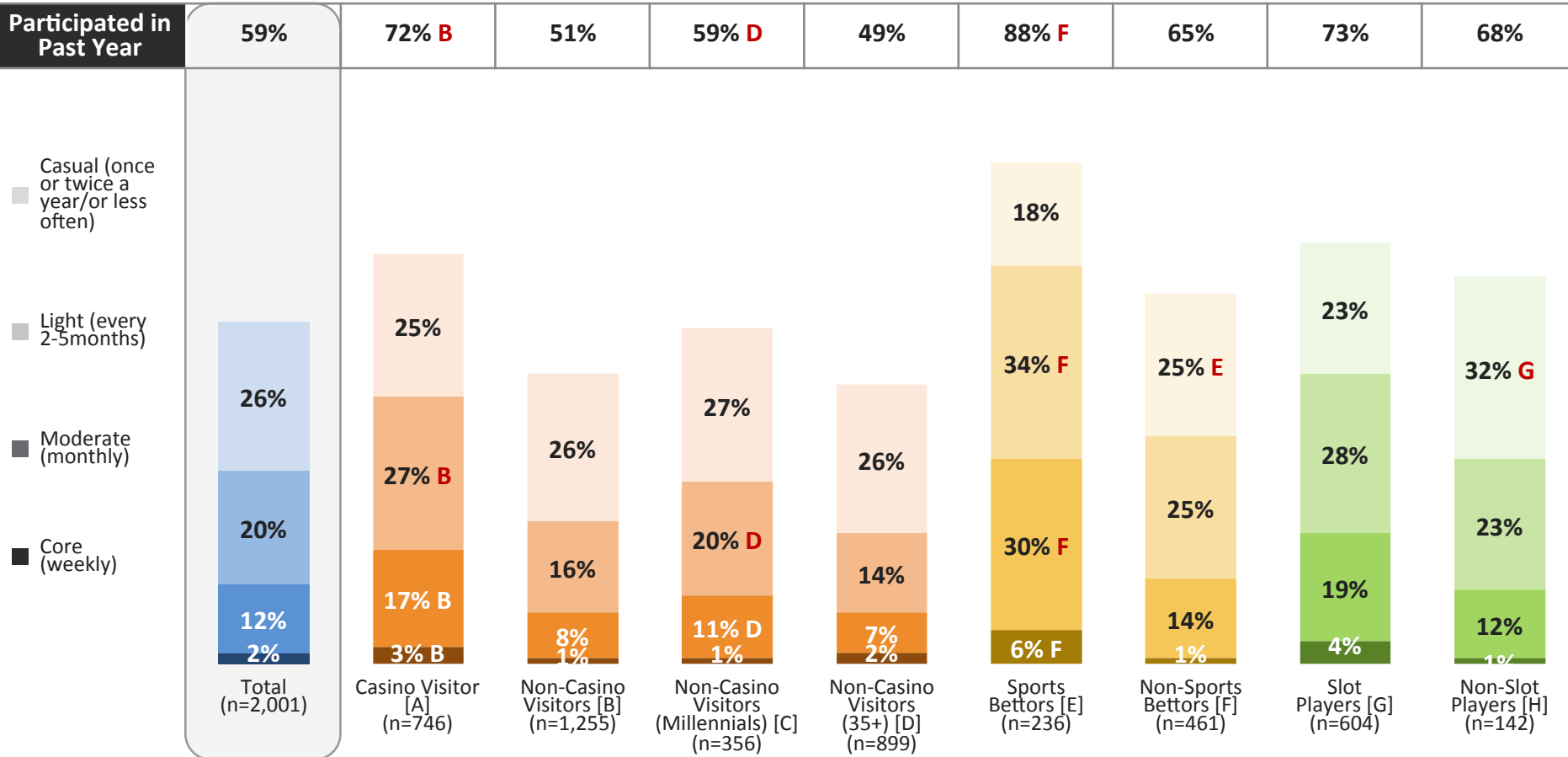
S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

ABCDEFHG Significantly higher than other subgroup.

Activity and Frequency of Participation (continued)

Attended a live show or sporting event



Base: All respondents

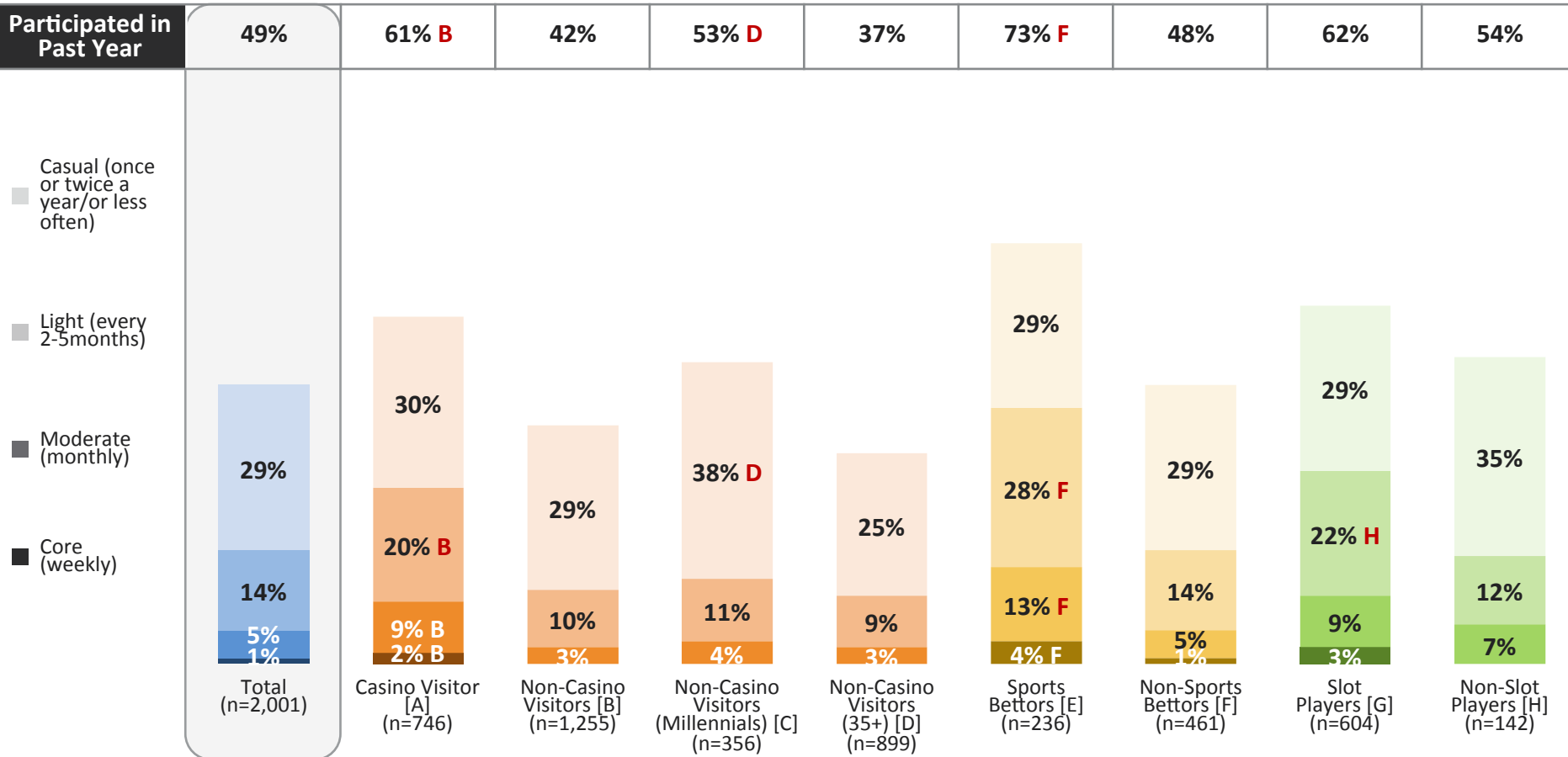
S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

ABCDEF GH Significantly higher than other subgroup.

Activity and Frequency of Participation (continued)

Went to a museum or amusement park



Base: All respondents

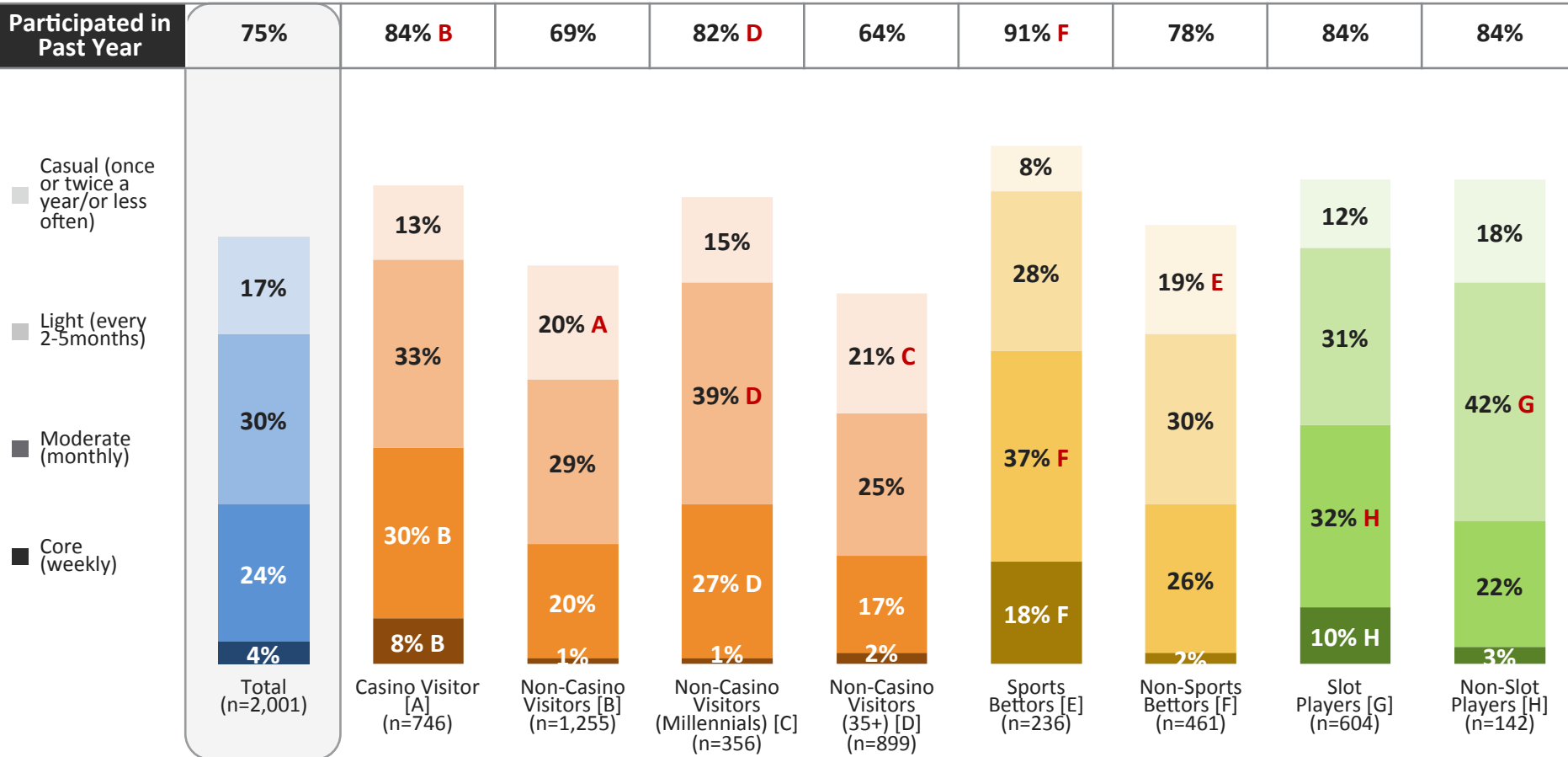
S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

ABCDEF Significantly higher than other subgroup.

Activity and Frequency of Participation (continued)

Went to the movie theatre



Base: All respondents

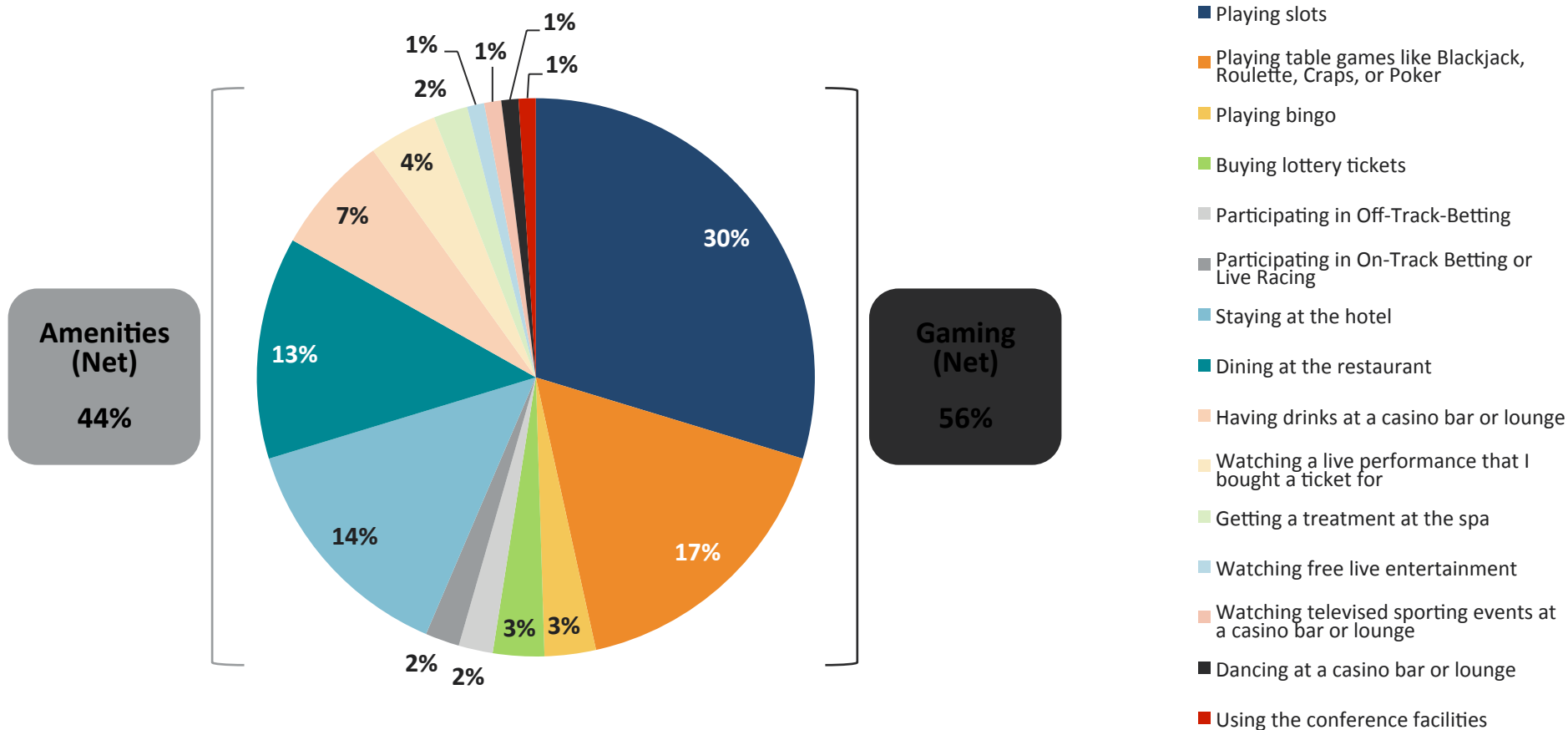
S2. When was the last time you participated in one of the following activities in the province where you live?

S3. How often do you typically participate in the following activities?

ABCDEFGH Significantly higher than other subgroup.

CASINO ATTITUDES AND PARTICIPATION

Share of Spend Summary



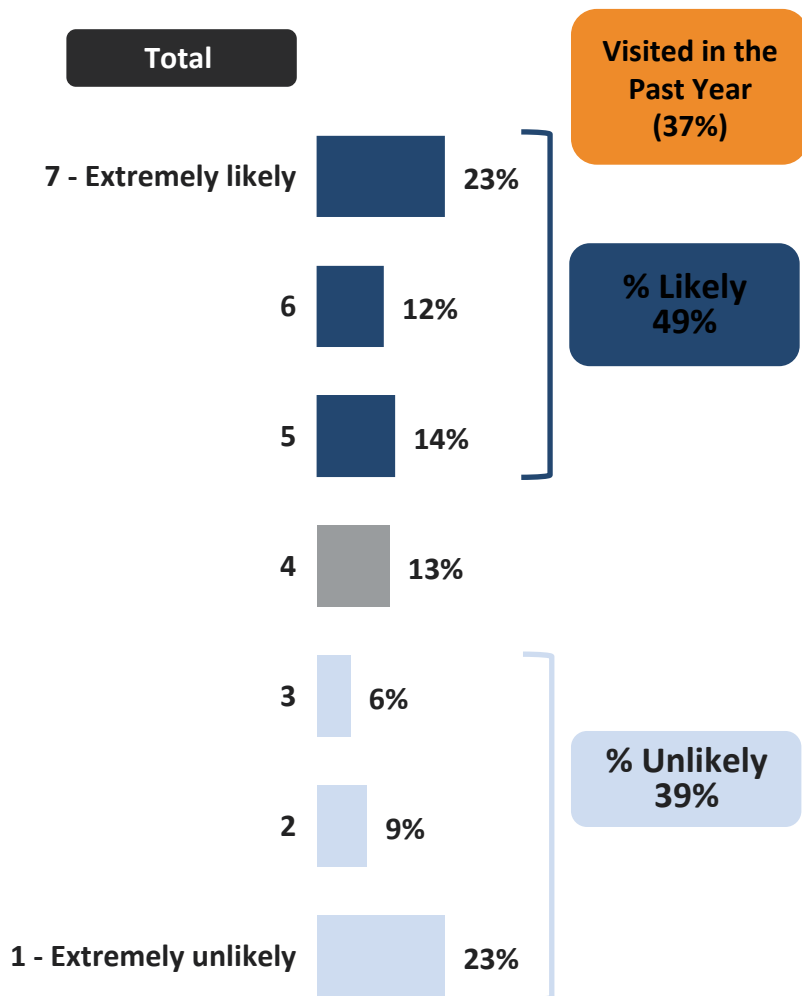
Base: Casino Visitors (n=745)

A4a. During your most recent visit to a casino/community gaming centre in the province where you live, please indicate how much money you spent (not including your winnings) on the following.

A4b. During your most recent visit to a casino/community gaming centre in the province where you live, please indicate how much money you spent (not including your winnings) on the following.

CASINO ATTITUDES AND PARTICIPATION

Likelihood of Casino/CGC Visitation in the Next Year



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=354) [B]	Non-Casino Visitors (Millennials) (n=133) [C]	Non-Casino Visitors (35+) (n=222) [D]	Sports Bettors (n=185) [E]	Non-Sports Bettors (n=267) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
68% B	8%	8%	9%	76% F	61%	77% H	32%
14%	10%	10%	10%	9%	14%	11%	24% G
18%	82% A	82%	82%	15%	25% E	12%	44% G

Base: Visited Casino/CGC in past year (n=1,100)

A9. How likely are you to visit a casino/community gaming centre in the province where you live in the next 12 months?

ABCDEFH Significantly higher than other subgroup.

FUTURE STATE OF CASINOS

Appeal of Casino Concept

"Gaming as you've never played before. A multigame space with live hosts, approx. 50 interactive terminals to play alone or in a group, and decor that changes according to the lights and sounds. A festive atmosphere by night, calmer by day, but always exciting. Look for this area in the Casino to enjoy a gaming experience that's unique in North America."

Total

7 - Very appealing



6

5

4

3

2

1 - Not at all appealing

%
Appealing
42%

% Not
Appealing
34%

Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
59% B	32%	36%	31%	65% F	52%	63% H	42%
25%	23%	28% D	21%	23%	21%	23%	32% G
16%	45% A	36%	48% C	13%	27% E	14%	26% G

Base: All respondents (n=2,001)

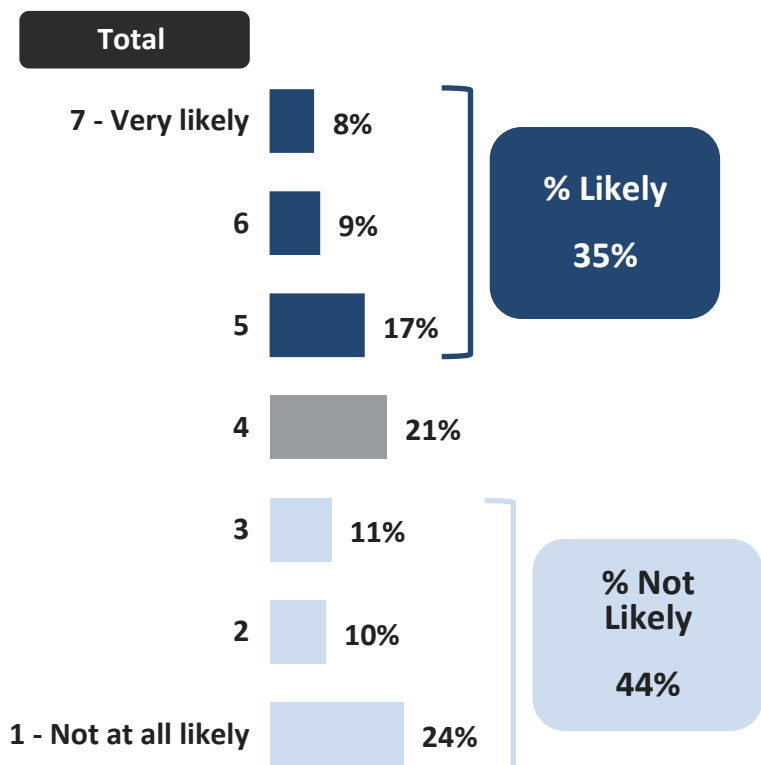
D2. Please indicate how appealing this casino concept is to you.

ABCDEF GH Significantly higher than other subgroup.

FUTURE STATE OF CASINOS

Likelihood to Visit the Casino to Experience the Casino Concept

"Gaming as you've never played before. A multigame space with live hosts, approx. 50 interactive terminals to play alone or in a group, and decor that changes according to the lights and sounds. A festive atmosphere by night, calmer by day, but always exciting. Look for this area in the Casino to enjoy a gaming experience that's unique in North America."



Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
60% B	20%	24% D	19%	61% F	43%	64% H	40%
23% B	19%	21%	18%	23%	24%	21%	33% G
17%	61% A	55%	63% C	16%	34% E	15%	28% G

Base: All respondents (n=2,001)

D4. How likely are you to Visit this casino.

ABCDEFGH Significantly higher than other subgroup.



DEMOGRAPHICS

CGA

Demographics

	Total (n=2,001)	Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
Gender									
Male	46%	48%	45%	27%	53% C	70% F	58%	50% H	37%
Female	54%	52%	55%	73% D	48%	30%	42% E	50%	63% G
Age									
18 to 34	30%	32%	28%	100% D	-	37% F	25%	28%	45% G
35 to 54	40%	41%	39%	-	55% C	46%	43%	43% H	32%
55 and over	31%	28%	32% A	-	45% C	18%	32% E	29%	23%
Mean	44.9	43.9	45.5 A	26.2	53.2 C	41.2	46.2 E	44.9 H	39.5
Region									
Alberta	11%	11%	11%	13%	10%	10%	10%	10%	16%
British Columbia	13%	14%	13%	11%	14%	16%	11%	14%	11%
Manitoba	4%	4%	4%	3%	4%	4%	4%	4%	3%
New Brunswick	3%	3%	2%	2%	2%	2%	4%	4%	1%
Newfoundland and Labrador	2%	<1%	2% A	3%	2%	1%	2%	0%	1%
Nova Scotia	3%	2%	4% A	2%	5% C	4%	2%	2%	2%
Ontario	39%	42% B	36%	36%	37%	43%	41%	42%	43%
Quebec	24%	21%	26% A	27%	25%	16%	24% E	21%	20%
Saskatchewan	3%	3%	3%	4%	3%	3%	2%	3%	3%

ABCDEFGH Significantly higher than other subgroup.

Base: All respondents

CGA

Demographics (continued)

	Total (n=2,001)	Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
Education									
High school or less	22%	21%	22%	25%	21%	16%	23% E	20%	23%
Some/graduated from college/CEGEP/Trade School	32%	32%	32%	27%	34% C	31%	27%	33%	28%
Some university, but did not finish	9%	8%	9%	11%	8%	6%	8%	7%	11%
University undergraduate degree	27%	29% B	25%	26%	25%	37%	31%	29%	29%
University graduate degree	11%	10%	12%	11%	12%	10%	11%	10%	10%
Income									
Less than \$40K	24%	20%	26% A	29%	25%	17%	20%	19%	24%
\$40K to less than \$80K	30%	30%	30%	36% D	28%	32%	29%	31% H	23%
\$80K to less than \$150K	29%	33% B	27%	22%	29% C	38%	31%	33%	32%
\$150K or more	7%	8%	7%	4%	8% C	9%	9%	8%	8%

ABCDEFHG Significantly higher than other subgroup.

Base: All respondents

CGA

Demographics (continued)

	Total (n=2,001)	Casino Visitor (n=746) [A]	Non-Casino Visitors (n=1,255) [B]	Non-Casino Visitors (Millennials) (n=356) [C]	Non-Casino Visitors (35+) (n=899) [D]	Sports Bettors (n=236) [E]	Non-Sports Bettors (n=461) [F]	Slot Players (n=604) [G]	Non-Slot Players (n=142) [H]
Employment									
Employed full-time	43%	48% B	40%	44%	39%	65% F	43%	49%	43%
Employed part-time	10%	10%	10%	12%	10%	8%	9%	10%	13%
Self employed	7%	9%	7%	4%	7%	6%	9%	9%	6%
Unemployed but looking for a job	5%	4%	5%	9% D	4%	4%	5%	4%	5%
Unemployed and not looking for a job/Long-term sick or disabled	4%	1%	5% A	2%	6% C	1%	4%	2%	1%
Full-time parent, homemaker	6%	4%	7% A	7%	7%	4%	6%	4%	5%
Retired	17%	16%	18%	-	25% C	8%	18% E	17%	11%
Student/Pupil	6%	5%	6%	21% D	1%	2%	5%	3%	13% G
Military	<1%	<1%	<1%	<1%	<1%	-	-	-	1%
Prefer not to answer	2%	2%	2%	2%	2%	2%	1%	2%	3%

ABCDEFGH Significantly higher than other subgroup.

Base: All respondents

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