



Your Voice 2018, BCLC's Employee Survey Comprehensive Report

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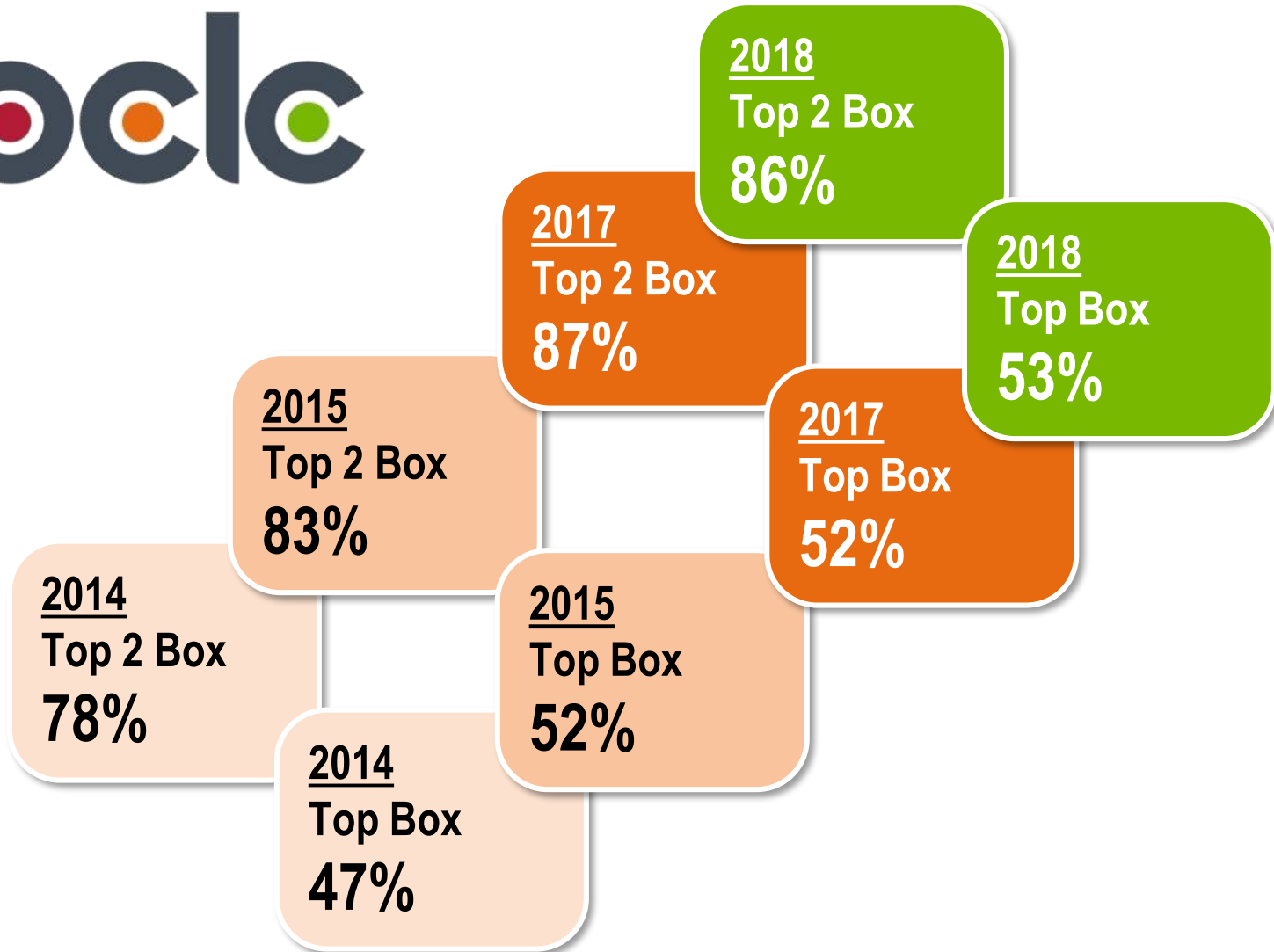
120 Influence of BCLC

147 Training & On-Boarding

- ⦿ 2018 was the ninth year of conducting *Your Voice*, the employee engagement survey for **bclc**.
- ⦿ All employees were invited to participate with the following exceptions:
 - ⦿ Students/Co-ops
 - ⦿ Anyone on LTD; however, employees on maternity leaves/STDs included
 - ⦿ New employees: up to 30 days of launch of survey included
- ⦿ The questionnaire was hosted online by Ipsos.
- ⦿ The survey was launched on Monday, January 22nd, 2018 and closed on Monday, February 5th, 2018.

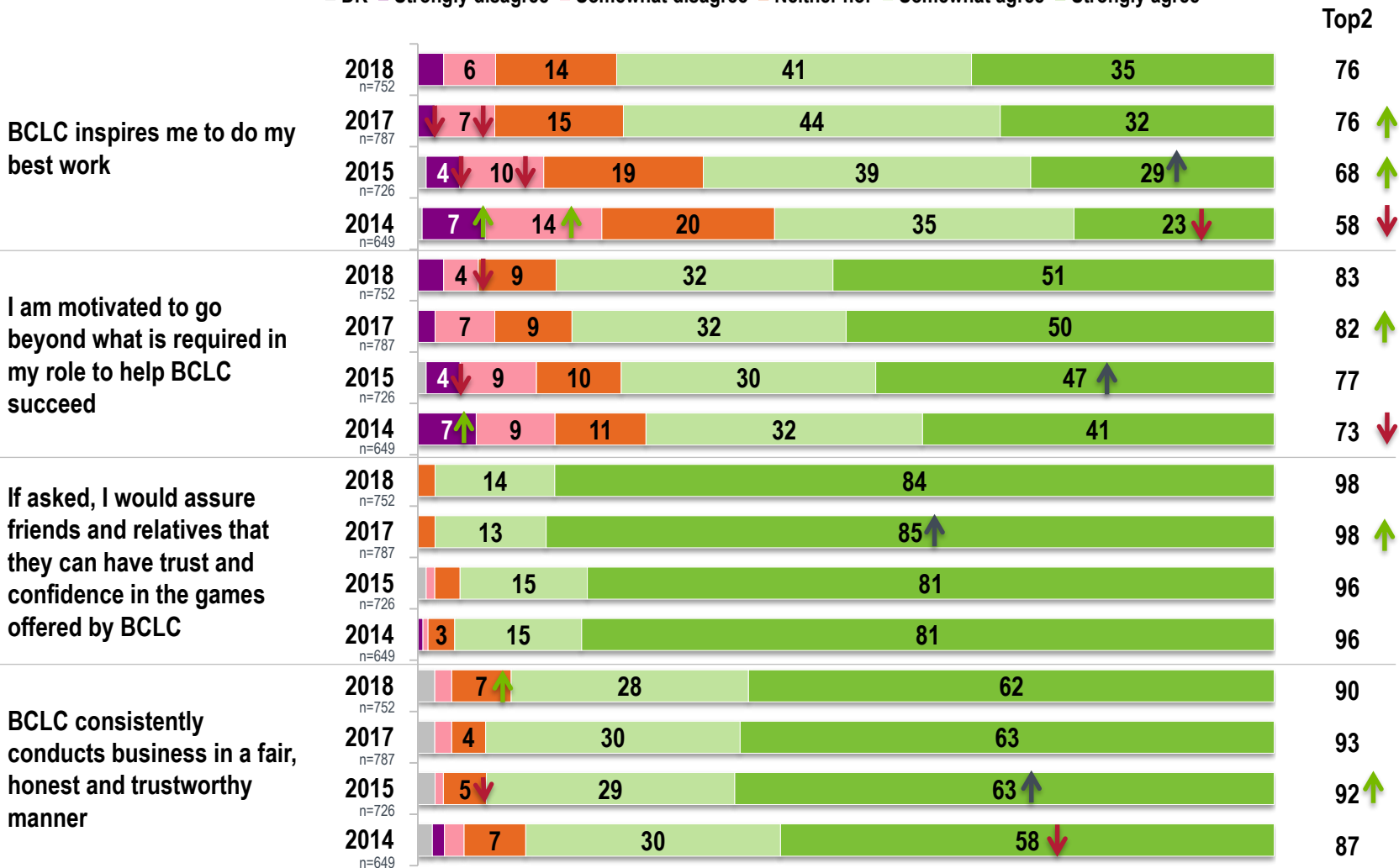
2018 Engagement Analysis

Progression of Index



Detailed Results

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



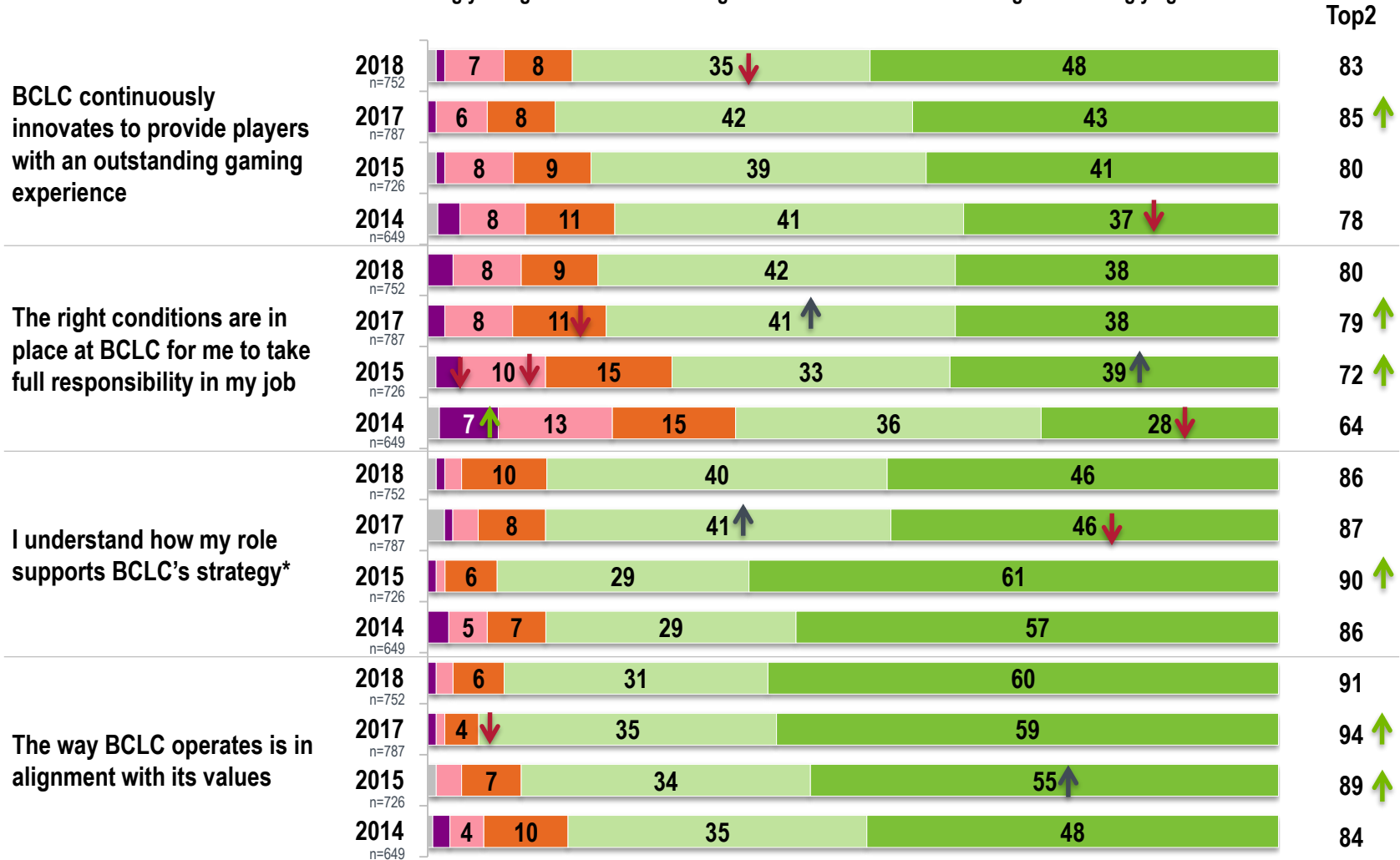
Significant increase from last year



Significant decrease from last year

Detailed Results

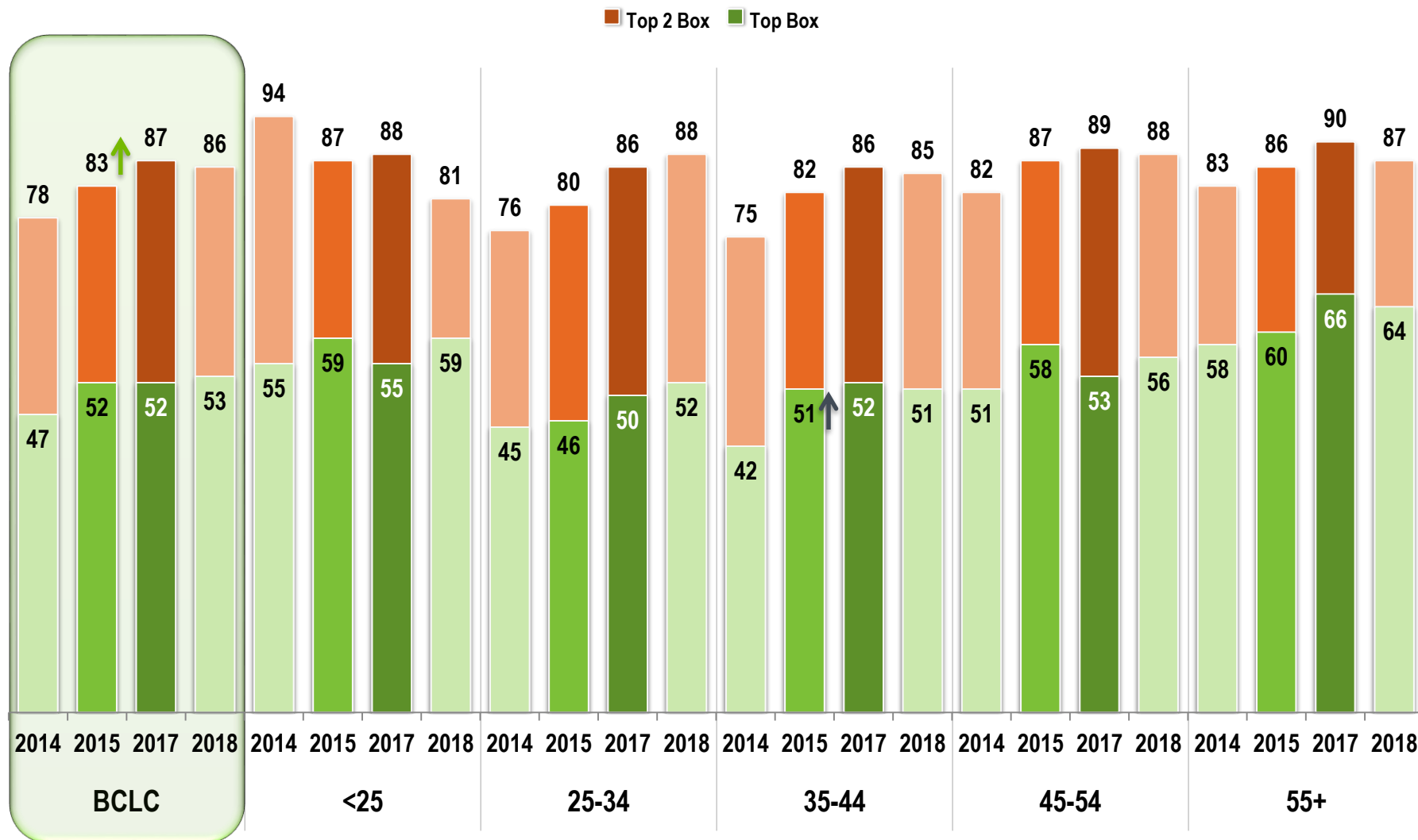
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



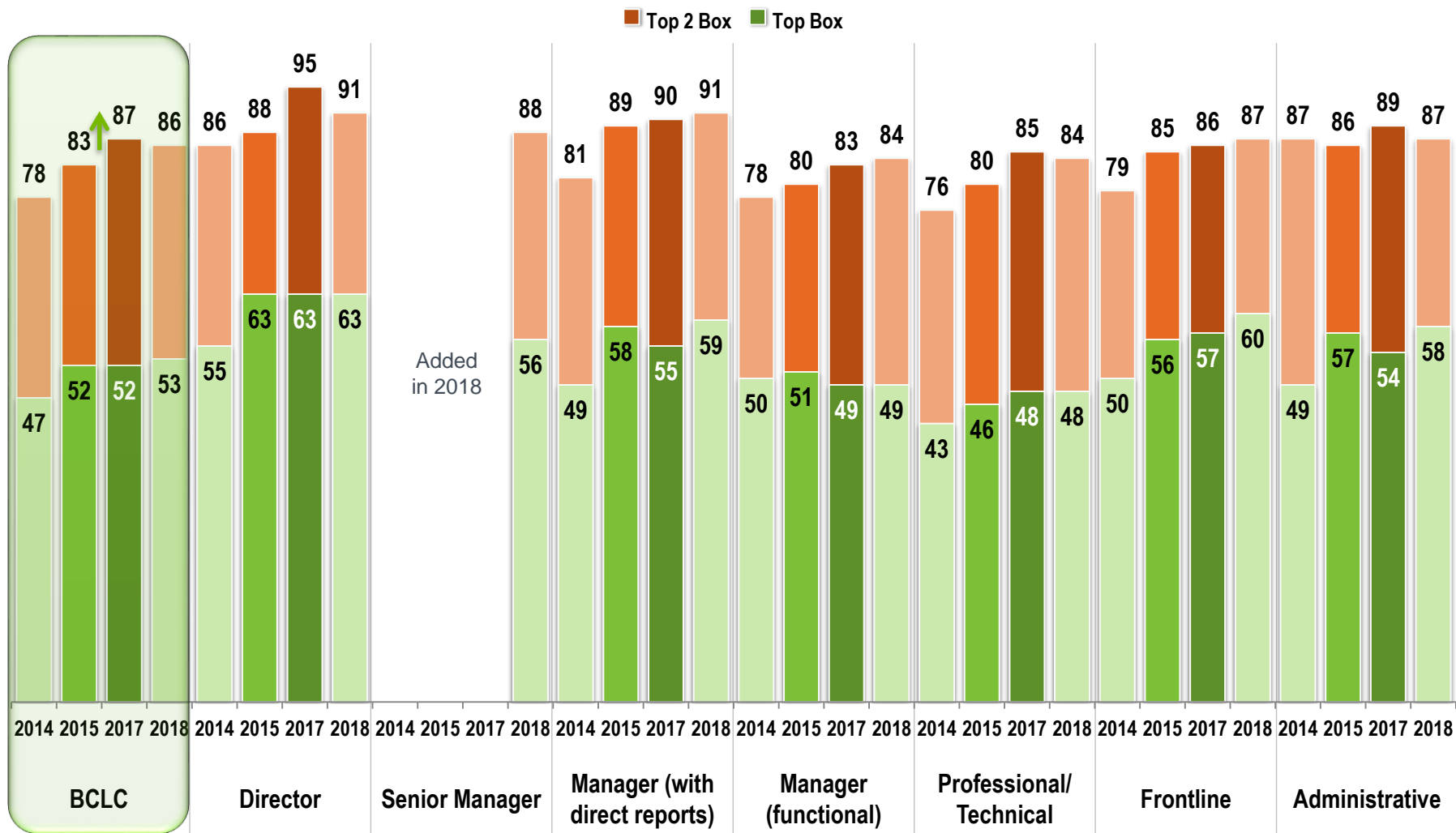
↑ Significant increase from last year ↓ Significant decrease from last year

*Question text change in 2017: "I understand how my role supports BCLC's business objectives"

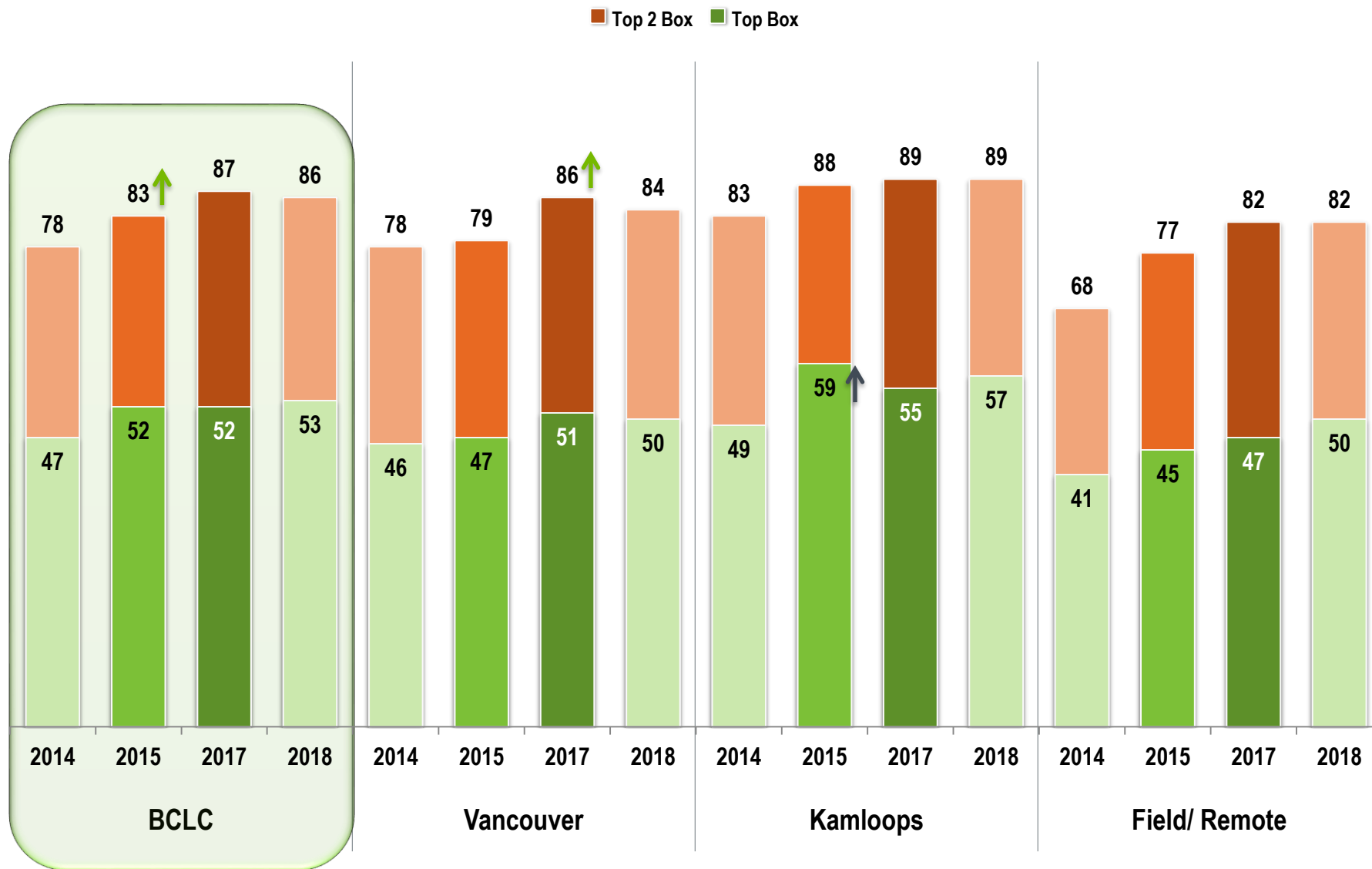
Employee Engagement Index by Age



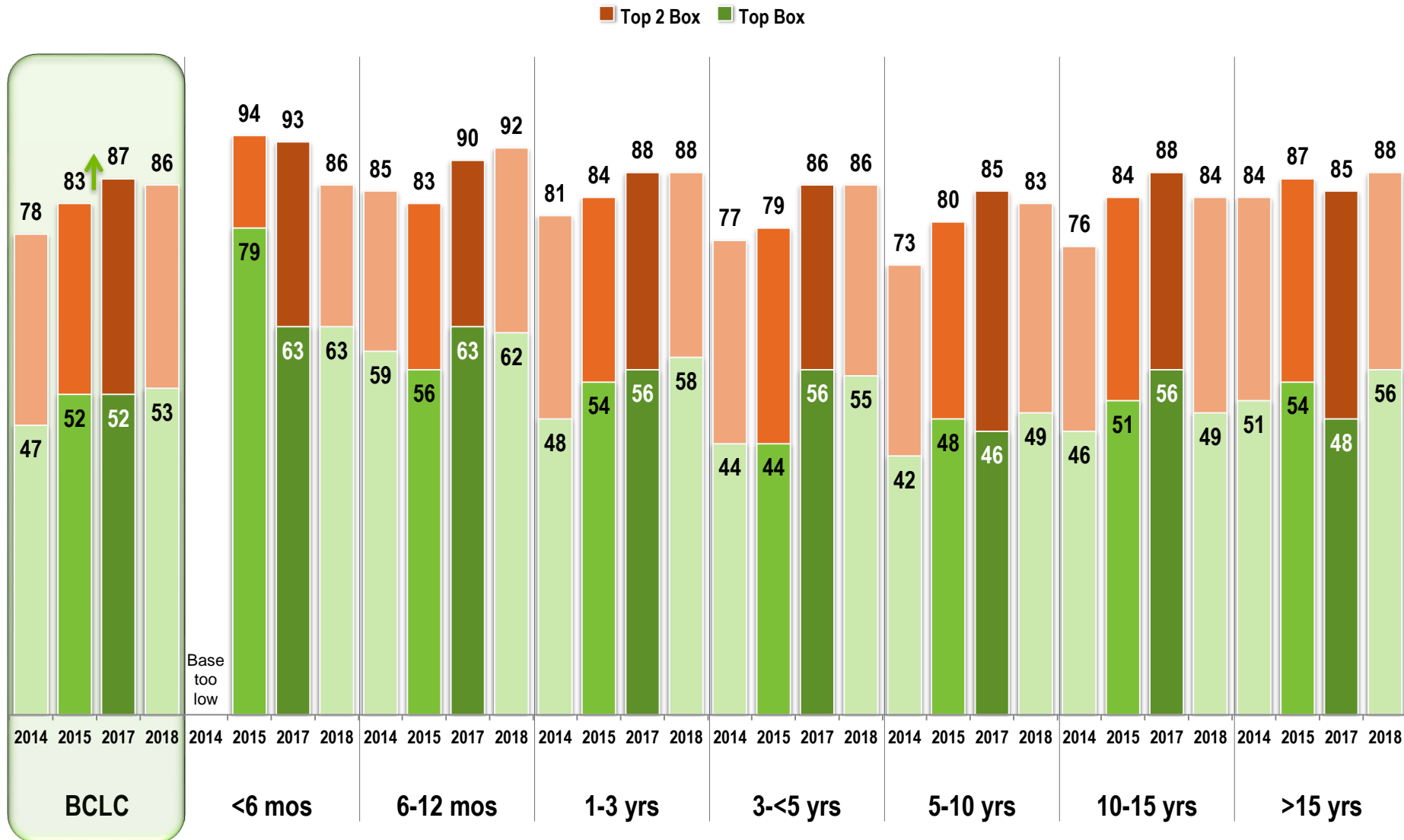
Employee Engagement Index by Role



Employee Engagement Index by Location



Employee Engagement Index by Tenure with the Organization

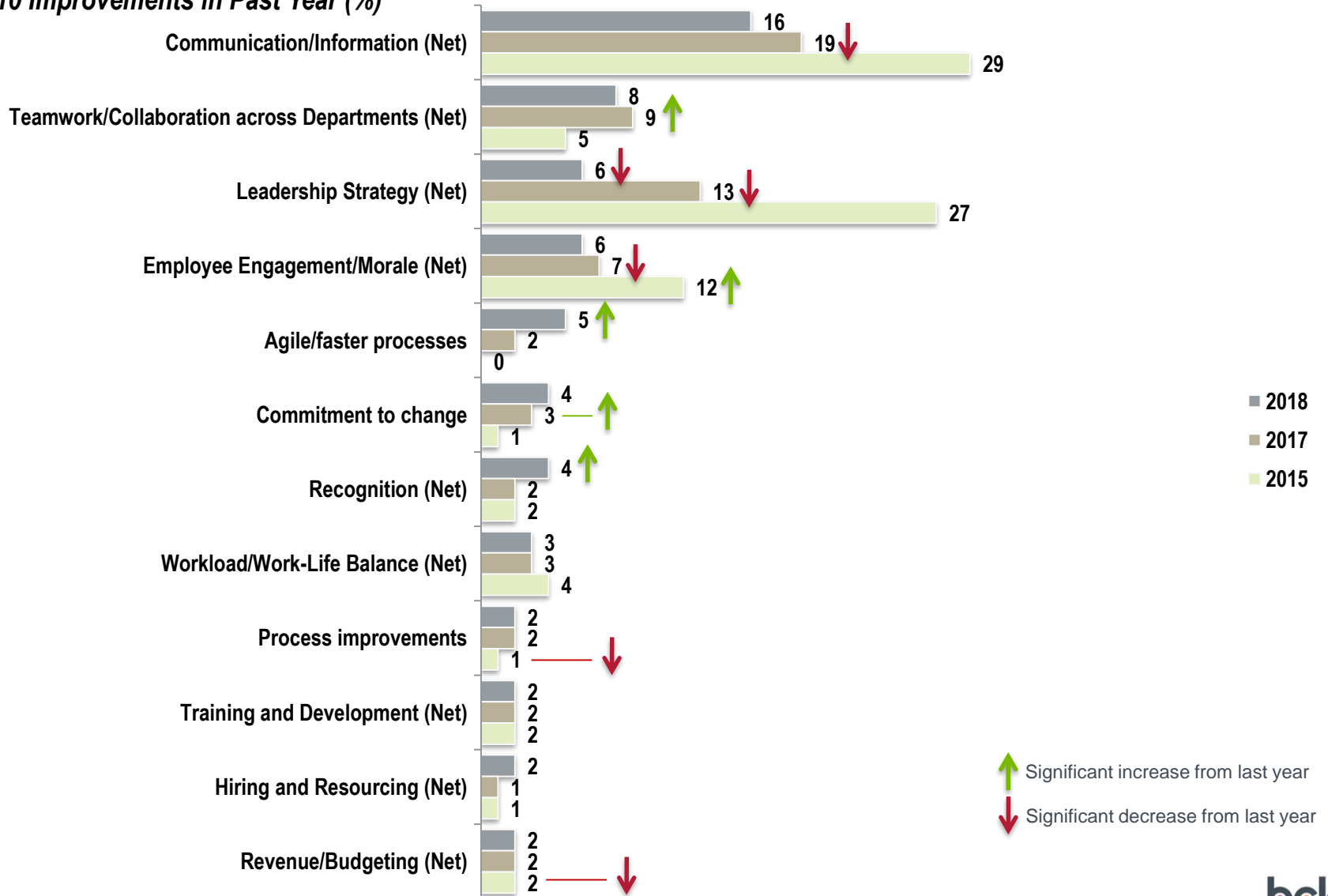


Self-Reported Improvements & Priorities



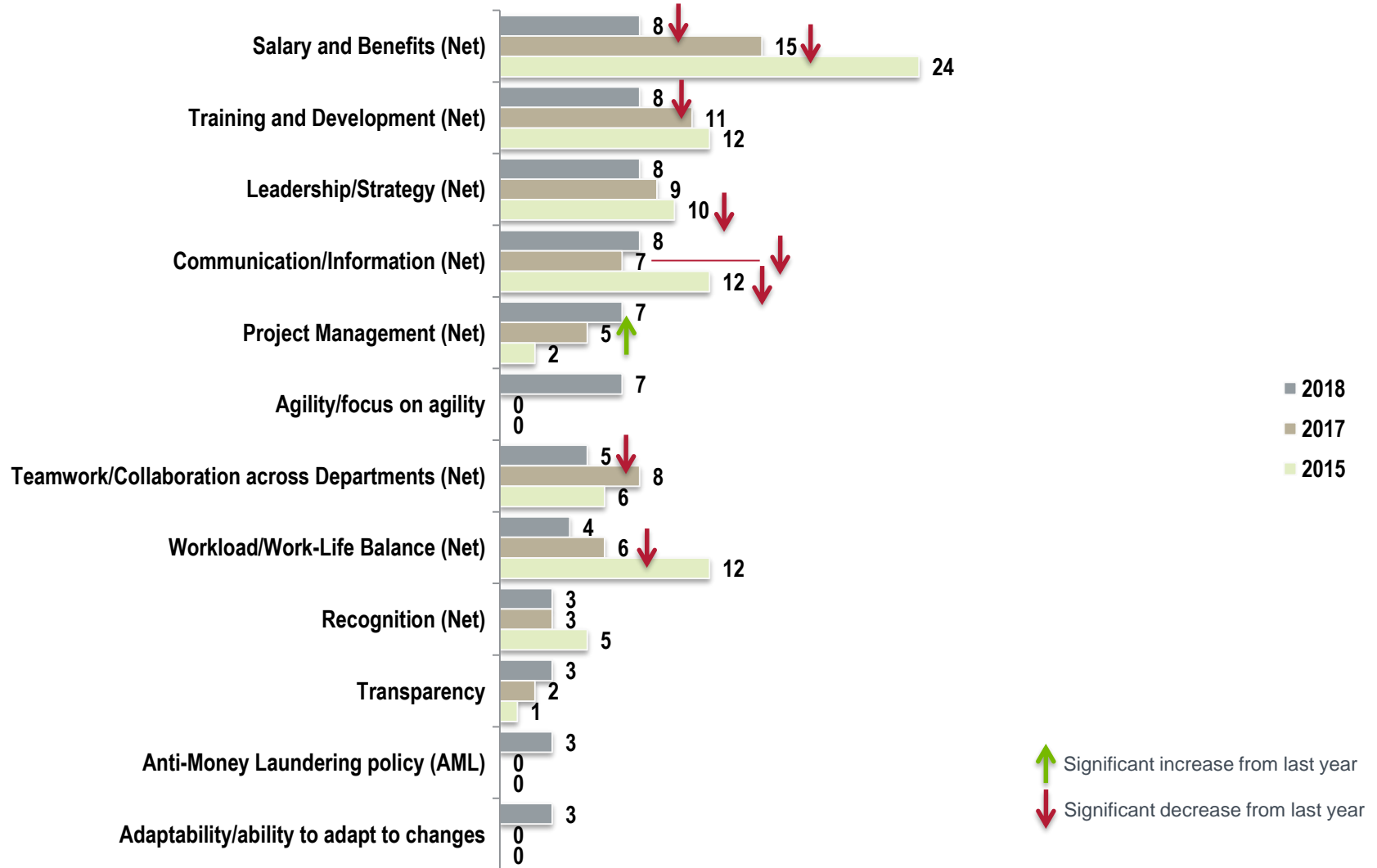
Significant Improvements at BCLC in Past Year – Top 12

Top 10 Improvements in Past Year (%)



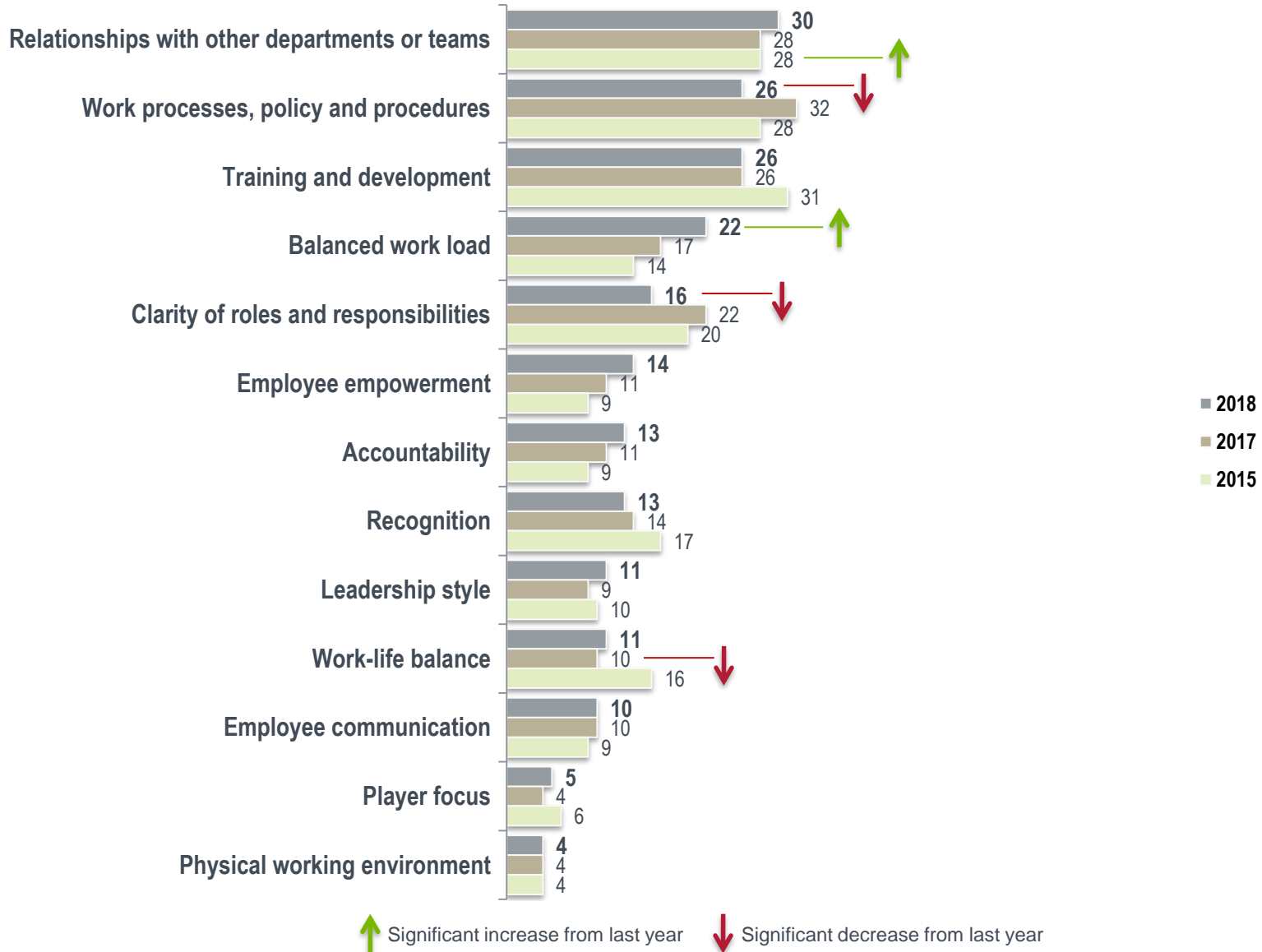
Priority Areas for Improvement at BCLC in Next Year (Coded Verbatims)

Top 12 areas for Improvements Over Next Year (%)



Self-Reported Departmental Improvement Areas

Please select the 2 items from the list below that you feel your department should focus on as priority areas for improvement. (%)



Evolution Over the Last 4 Years



Stables (Top 2 Box – 4 Year Trend)

Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
The balance between private and professional life.	-1.4%	8.2%	5.9%	82.8%	84.2%	76.0%	70.1%
I have confidence in the decisions made by the entire Senior Leadership team (CEO, VPs and Directors) of BCLC.	-1.4%	6.6%	13.5%	79.4%	80.8%	74.2%	60.7%
The person I report to is committed to my development.	-1.4%	0.2%	10.0%	80.3%	81.7%	81.5%	71.5%
Overall, how satisfied are you with your job at the present time?	-1.3%	11.5%	3.7%	81.5%	82.8%	71.3%	67.6%
The actions of my division's Senior Leadership team (VP and Directors) are consistent with BCLC values (Integrity, Respect & Social Responsibility).	-1.3%	4.2%	4.8%	85.1%	86.4%	78.9%	74.1%
I have opportunities to provide input into decisions that affect my work.	-1.2%	3.1%	6.3%	82.3%	83.5%	80.4%	74.1%
Communication is good within my team.	-1.2%	0.8%	5.2%	81.1%	82.3%	81.5%	76.3%
My work conditions allow me to perform effectively.	-1.1%	2.1%	8.1%	80.3%	81.4%	79.3%	71.2%
The person I report to encourages collaboration with other teams.	-0.9%	0.9%	5.9%	84.2%	85.1%	84.2%	78.3%
I understand how my role supports BCLC's strategy.	-0.9%	-3.5%	4.7%	86.4%	87.3%	90.8%	86.1%

Stables (Top 2 Box – 4 Year Trend)

Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
I believe I am recognized based on my performance.	-0.8%	6.5%	2.0%	67.8%	68.6%	62.1%	60.1%
Official communications are effective in helping me better understand our business objectives.	-0.7%	3.8%	5.3%	80.2%	80.9%	77.1%	71.8%
The person I report to continually seeks ways to improve the customers' experience.	-0.7%	2.8%	8.2%	82.7%	83.4%	80.6%	72.4%
BCLC does everything it can to increase safer play and reduce gambling-related harm	-0.7%	-	-	88.8%	89.5%	-	-
My division's objectives are aligned with BCLC's strategy	-0.7%	-	-	82.0%	82.7%	-	-
The person I report to promotes open and honest communication.	-0.6%	0.4%	5.4%	86.6%	87.2%	86.8%	81.4%
I can influence my workplace through my ideas and involvement.	-0.6%	5.5%	4.4%	82.6%	83.2%	77.7%	73.3%
BCLC encourages British Columbians to play responsibly.	-0.6%	1.9%	0.1%	95.2%	95.8%	93.9%	93.8%
BCLC is good at developing employees to their utmost potential.	-0.5%	8.9%	10.0%	65.2%	65.7%	56.8%	46.8%
I would recommend BCLC as an employer to a friend or family member.	-0.5%	7.7%	14.6%	89.8%	90.3%	82.6%	68.0%

Stables (Top 2 Box – 4 Year Trend)

Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
The person I report to values my contributions.	-0.5%	1.5%	3.5%	88.6%	89.1%	87.6%	84.1%
The entire Senior Leadership team (CEO, VPs and Directors) communicates a clear vision of where BCLC is going.	-0.3%	8.9%	5.1%	81.3%	81.6%	72.7%	67.6%
BCLC is a good corporate citizen.	-0.3%	3.3%	3.6%	94.0%	94.3%	91.0%	87.4%
The expectations for my job are motivating.	-0.2%	4.2%	6.2%	68.9%	69.1%	64.9%	58.7%
I take personal responsibility for my own career development.	-0.2%	2.7%	0.5%	94.8%	95.0%	92.3%	91.8%
Teams and people are highly collaborative	-0.2%	-	-	70.2%	70.4%	-	-
The expectations for my job are clear.	-0.1%	0.5%	5.1%	81.3%	81.4%	80.9%	75.8%
BCLC makes a positive contribution to the province of BC.	0.0%	2.6%	0.8%	97.5%	97.5%	94.9%	94.1%
My department's objectives are clear.	0.0%	2.1%	8.4%	83.4%	83.4%	81.3%	72.9%
I have confidence in the decisions made by the person I report to.	0.1%	-0.6%	5.8%	82.6%	82.5%	83.1%	77.3%

Stables (Top 2 Box – 4 Year Trend)

Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
The work processes at BCLC allow me to perform effectively.	0.1%	0.1%	7.7%	63.8%	63.7%	63.6%	55.9%
Recognition is given in a personal and meaningful way.	0.1%	5.8%	6.5%	66.2%	66.1%	60.3%	53.8%
If asked, I would assure friends and relatives that they can have trust and confidence in the games offered by BCLC.	0.1%	2.2%	0.1%	97.9%	97.8%	95.6%	95.5%
The person I report to treats me with respect.	0.2%	0.8%	3.5%	92.2%	92.0%	91.2%	87.7%
I have confidence in the decisions made by my division's Senior Leadership team (VP and Directors).	0.2%	8.2%	8.6%	82.8%	82.6%	74.4%	65.8%
I understand BCLC's strategy	0.4%	-	-	84.0%	83.6%	-	-
BCLC inspires me to do my best work.	0.7%	8.5%	8.7%	76.3%	75.6%	67.1%	58.4%
I am motivated to go beyond what is required in my role to help BCLC succeed.	0.8%	4.9%	3.7%	82.6%	81.8%	76.9%	73.2%
The flexibility of the work schedule.	0.8%	4.5%	3.7%	85.9%	85.1%	80.6%	76.9%
The person I report to encourages and supports innovative thinking.	0.9%	-1.1%	7.0%	86.0%	85.1%	86.2%	79.2%

Stables (Top 2 Box – 4 Year Trend)

Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
I understand what social responsibility means to BCLC.	0.9%	1.3%	2.3%	95.7%	94.8%	93.5%	91.2%
BCLC is genuinely interested in the well-being of its employees.	0.9%	12.9%	14.3%	83.4%	82.5%	69.6%	55.3%
I understand the need for change within BCLC.	1.0%	2.1%	-0.2%	95.5%	94.5%	92.4%	92.6%
The working atmosphere within the team.	1.1%	0.7%	9.6%	82.4%	81.3%	80.6%	71.0%
BCLC has a culture of building trust	1.1%	-	-	79.5%	78.4%	-	-
My work supports BCLC's strategy	1.4%	-	-	88.7%	87.3%	-	-

Increases (Top 2 Box – 4 Year Trend)



Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
BCLC has made progress on issues raised in the last year's employee survey.	8.9%	3.7%	16.6%	53.9%	45.0%	41.3%	24.7%
My department took action based on the employee survey results.	7.6%	7.9%	12.5%	60.0%	52.4%	44.5%	32.0%
I am well informed about my pension/retirement savings program.	5.1%	2.0%	-4.4%	70.2%	65.1%	63.1%	67.5%
The opportunities for training.	5.0%	4.8%	11.3%	71.8%	66.8%	62.0%	50.7%
I received adequate support from the HR department. (Caution small base size; asked only if tenure is less than 6 months)	4.3%	-20.5%	11.1%	72.7%	68.4%	88.9%	77.8%
My benefits package meets my current needs.	3.5%	-1.0%	1.1%	89.0%	85.5%	86.5%	85.4%
The opportunities for career progression.	3.5%	1.9%	10.7%	56.0%	52.5%	50.6%	39.9%
My overall compensation package (pay, bonus and benefits) reflects my performance.	3.3%	11.1%	-5.7%	56.8%	53.5%	42.4%	48.1%
My role is a good fit with my skills.	3.0%	1.0%	-0.1%	88.8%	85.8%	84.8%	84.9%
BCLC provides rewards to recognize various levels of achievement.	2.4%	13.0%	-5.9%	69.7%	67.3%	54.3%	60.2%

Increases (Top 2 Box – 4 Year Trend)



Statement	% Change from 2017-2018	% Change from 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
I feel that my overall compensation package (pay, bonus and benefits) is comparable with people doing a similar job within BCLC.	2.3%	2.6%	2.2%	55.2%	52.9%	50.3%	48.1%
The person I report to develops teamwork within our own team.	2.2%	-0.6%	7.7%	80.9%	78.7%	79.3%	71.6%
I have all the resources I require to do my job well.	2.0%	0.6%	9.6%	81.5%	79.5%	78.9%	69.3%
Overall satisfaction with the salary.	1.9%	8.8%	-6.0%	56.8%	54.9%	46.1%	52.1%
My work enables me to improve my skills.	1.9%	3.1%	3.0%	82.7%	80.8%	77.7%	74.7%
I am well informed about my benefits package.	1.8%	-2.5%	1.9%	81.5%	79.7%	82.2%	80.3%
My job gives me a sense of personal accomplishment.	1.7%	1.4%	4.3%	83.1%	81.4%	80.0%	75.7%
The right conditions are in place at BCLC for me to take full responsibility in my job.	1.5%	6.9%	8.0%	80.2%	78.7%	71.8%	63.8%
I support the need for change within BCLC.	1.5%	2.8%	2.7%	97.3%	95.8%	93.0%	90.3%

Decreases (Top 2 Box – 4 Year Trend)



Statement	% Change 2017-2018	% Change 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
Projects and initiatives that are launched within BCLC usually get completed.	-10.2%	10.1%	4.7%	60.2%	70.4%	60.3%	55.6%
The entire Senior Leadership team (CEO, VPs and Directors) reflects and supports the leadership practices necessary to make BCLC successful.	-8.7%	9.7%	16.3%	76.2%	84.9%	75.2%	58.9%
The on-boarding program helps new hires to become productive very quickly.	-8.2%	-3.1%	-5.9%	47.1%	55.3%	58.4%	64.3%
I received adequate support from my colleagues. (Caution small base size; asked only if tenure is less than 6 months)	-7.7%	-10.5%	22.2%	81.8%	89.5%	100.0%	77.8%
The on-boarding process was critical to my success in my job. (Caution small base size; asked only if tenure is less than 6 months)	-6.2%	1.1%	0.0%	72.7%	78.9%	77.8%	77.8%
I received adequate support from my mentor. (Caution small base size; asked only if tenure is less than 6 months)	-6.2%	-10.0%	44.5%	72.7%	78.9%	88.9%	44.4%
Customer feedback is shared across the company.	-4.5%	6.9%	-0.1%	48.7%	53.2%	46.3%	46.4%
Communication of major corporate initiatives is timely	-4.5%	-	-	71.4%	75.9%	-	-
I consider player health implications when making business decisions in my role at BCLC	-3.9%	-	-	79.1%	83.0%	-	-
I received adequate support from the person I report to. (Caution small base size; asked only if tenure is less than 6 months)	-3.8%	-5.3%	22.2%	90.9%	94.7%	100.0%	77.8%

Decreases (Top 2 Box – 4 Year Trend)



Statement	% Change 2017-2018	% Change 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
I feel that my overall compensation package (pay, bonus and benefits) is comparable with people doing a similar job with other similar organizations.	-3.2%	6.6%	-2.3%	39.2%	42.4%	35.8%	38.1%
Our team values one another's unique strengths and different abilities.	-3.1%	1.6%	5.7%	84.6%	87.7%	86.1%	80.4%
My department's objectives are realistic.	-3.0%	7.4%	10.1%	76.7%	79.7%	72.3%	62.2%
Change is widely embraced	-2.9%	-	-	61.6%	64.5%	-	-
BCLC is transforming to a player-centric company.	-2.7%	5.3%	3.2%	81.0%	83.7%	78.4%	75.2%
BCLC consistently conducts business in a fair, honest and trustworthy manner.	-2.6%	0.4%	4.7%	89.9%	92.5%	92.1%	87.4%
The way BCLC operates is in alignment with its values (Integrity, Respect & Social Responsibility).	-2.4%	4.9%	5.5%	91.5%	93.9%	89.0%	83.5%
BCLC is environmentally responsible.	-2.2%	3.1%	4.8%	82.6%	84.8%	81.7%	76.9%
The actions of the entire Senior Leadership team (CEO, VPs and Directors) of BCLC are consistent with BCLC values (Integrity, Respect & Social Responsibility).	-2.1%	7.1%	7.4%	81.0%	83.1%	76.0%	68.6%
BCLC is customer focused	-1.9%	-	-	85.4%	87.3%	-	-

Decreases (Top 2 Box – 4 Year Trend)



Statement	% Change 2017-2018	% Change 2015-2017	% Change 2014 - 2015	2018	2017	2015	2014
BCLC continuously innovates to provide players with an outstanding gambling experience.	-1.8%	5.3%	1.5%	83.0%	84.8%	79.5%	78.0%
The expectations for my job are realistic.	-1.7%	4.0%	9.0%	78.2%	79.9%	75.9%	66.9%
Communication of major corporate initiatives is relevant	-1.7%	-	-	78.9%	80.6%	-	-
I believe that the people I work with respect me as a person.	-1.6%	2.5%	1.5%	89.6%	91.2%	88.7%	87.2%
The morale in my department is high.	-1.5%	9.4%	14.6%	73.3%	74.8%	65.4%	50.8%
I have had sufficient input into determining the goals for my job.	-0.7%	8.0%	7.4%	78.5%	79.2%	75.5%	68.1%

Factor Analysis

Priority Matrix

- Factor Analysis was conducted for a number of reasons:
 - To understand how attributes are grouped together in the minds of respondents.
 - To condense the numerous attributes in the questionnaire into common themes.
 - To feed the factors into a key driver analysis with the purpose of understanding priority areas for action in a more focused manner.
- The process consisted of both a mathematical and logic/reason-based step:
 - Firstly, the analysis mathematically grouped highly related attributes into groups, referred to as *factors*.
 - Secondly, the factors were reviewed and adjusted to better reflect the understanding of the BCLC work environment.
- The result of the factor analysis was a set of 18 Factors.
 - The factors have been used to organize the detailed results by question and to input in the Priority Matrix.

BCLC Factors Ranking Detailed

High Impact

- Senior Leadership
- BCLC Strategy
- Job Skills & Input
- BCLC Culture
- Corporate Responsibility
- Career Development & Training

Average Impact

- Recognition
- Job Expectations
- Resources & Processes
- Team Environment & Morale
- Acting on Survey
- Communication & Initiatives
- Work-Life Balance
- My Manager

Low Impact

- Overall Satisfaction
- My Compensation
- My Benefits
- Need for Change
- Recommend BCLC

Senior Leadership

- The actions of the entire Senior Leadership team (CEO, VPs and Directors) of BCLC are consistent with BCLC values (Integrity, Respect & Social Responsibility).
- The actions of my division's Senior Leadership team (VP and Directors) are consistent with BCLC values (Integrity, Respect & Social Responsibility)
- The entire Senior Leadership team (CEO, VPs and Directors) communicates a clear vision of where BCLC is going.
- I have confidence in the decisions made by the entire Senior Leadership team (CEO, VPs and Directors) of BCLC.
- I have confidence in the decisions made by my division's Senior Leadership team (VP and Directors).

BCLC Strategy

- My division's objectives are aligned with BCLC's strategy.
- My work supports BCLC's strategy
- I understand BCLC's strategy.
- My department's objectives are clear.
- My department's objectives are realistic.

Job Skills & Input

- I have opportunities to provide input into decisions that affect my work.
- My job gives me a sense of personal accomplishment.
- My role is a good fit with my skills.
- My work enables me to improve my skills.
- I can influence my workplace through my ideas and involvement.
- I have had sufficient input into determining the goals for my job.

BCLC Culture

- Change is widely embraced.
- Teams and people are highly collaborative.
- BCLC has a culture of building trust.
- BCLC is customer focused.

Corporate Responsibility

- BCLC encourages British Columbians to play responsibly.
- BCLC makes a positive contribution to the province of BC.
- BCLC is a good corporate citizen.
- BCLC does everything it can to increase safer play and reduce gambling-related harm.
- BCLC is transforming to a player-centric company.
- I consider player health implications when making business decisions in my role at BCLC.
- BCLC is environmentally responsible.
- I understand what Social Responsibility means to BCLC.

Career Development & Training

- I take personal responsibility for my own career development.
- BCLC is good at developing employees to their utmost potential.
- Satisfaction with the opportunities for training
- Satisfaction with the opportunities for career progression

BCLC Factors Ranking – Average Impact

Average Impact

Recognition

- I believe I am recognized based on my performance.
- Recognition is given in a personal and meaningful way.
- BCLC provides rewards to recognize various levels of achievement.

Job Expectations

- The expectations for my job are motivating.
- The expectations for my job are clear.
- The expectations for my job are realistic.

Resources & Processes

- I have all the resources I require to do my job well.
- My work conditions allow me to perform effectively.
- The work processes at BCLC allow me to perform effectively.

Team Environment & Morale

- I believe that the people I work with respect me as a person.
- Communication is good within my team.
- The morale in my department is high.
- Satisfaction with the working atmosphere within the team.
- Our team values one another's unique strengths and different abilities.

Acting on Survey

- BCLC has made progress on issues raised in the last employee survey.
- My department took action based on the employee survey results.

Communication & Initiatives

- Communication of major corporate initiatives is timely.
- Projects and initiatives that are launched within BCLC usually get completed.
- Official communications are effective in helping me better understand our business objectives.
- Communication of major corporate initiatives is timely and relevant.
- Customer feedback is shared across the company.

Work-Life Balance

- Satisfaction with the balance between private and professional life
- Satisfaction with the flexibility of the work schedule
- BCLC is genuinely interested in the well-being of its employees.

My Manager

- I have confidence in the decisions made by the person I report to.
- The person I report to encourages and supports innovative thinking.
- The person I report to promotes open and honest communication.
- The person I report to is committed to my development.
- The person I report to treats me with respect.
- The person I report to values my contributions.
- The person I report to develops teamwork within our own team.
- The person I report to encourages collaboration with other teams.
- The person I report to continually seeks ways to improve the customers' experience

Average Impact

BCLC Factors Ranking – Low Impact

Recommend BCLC

- I would recommend BCLC as an employer to a friend or family member.

Overall Satisfaction

- Overall, how satisfied are you with your job at the present time?

My Compensation

- My overall compensation package (pay, bonus and benefits) reflects my performance.
- Satisfaction with the salary
- I feel that my overall compensation package (pay, benefits and bonuses) is comparable with people doing a similar job within BCLC.
- I feel that my overall compensation package (pay, bonus and benefits) is comparable with people doing a similar job with other similar organizations.

My Benefits

- I am well informed about my benefits package.
- My benefits package meets my current needs.
- I am well informed about my pension/retirement savings program.

Need for Change

- I understand the need for change within BCLC.
- I support the need for change within BCLC.

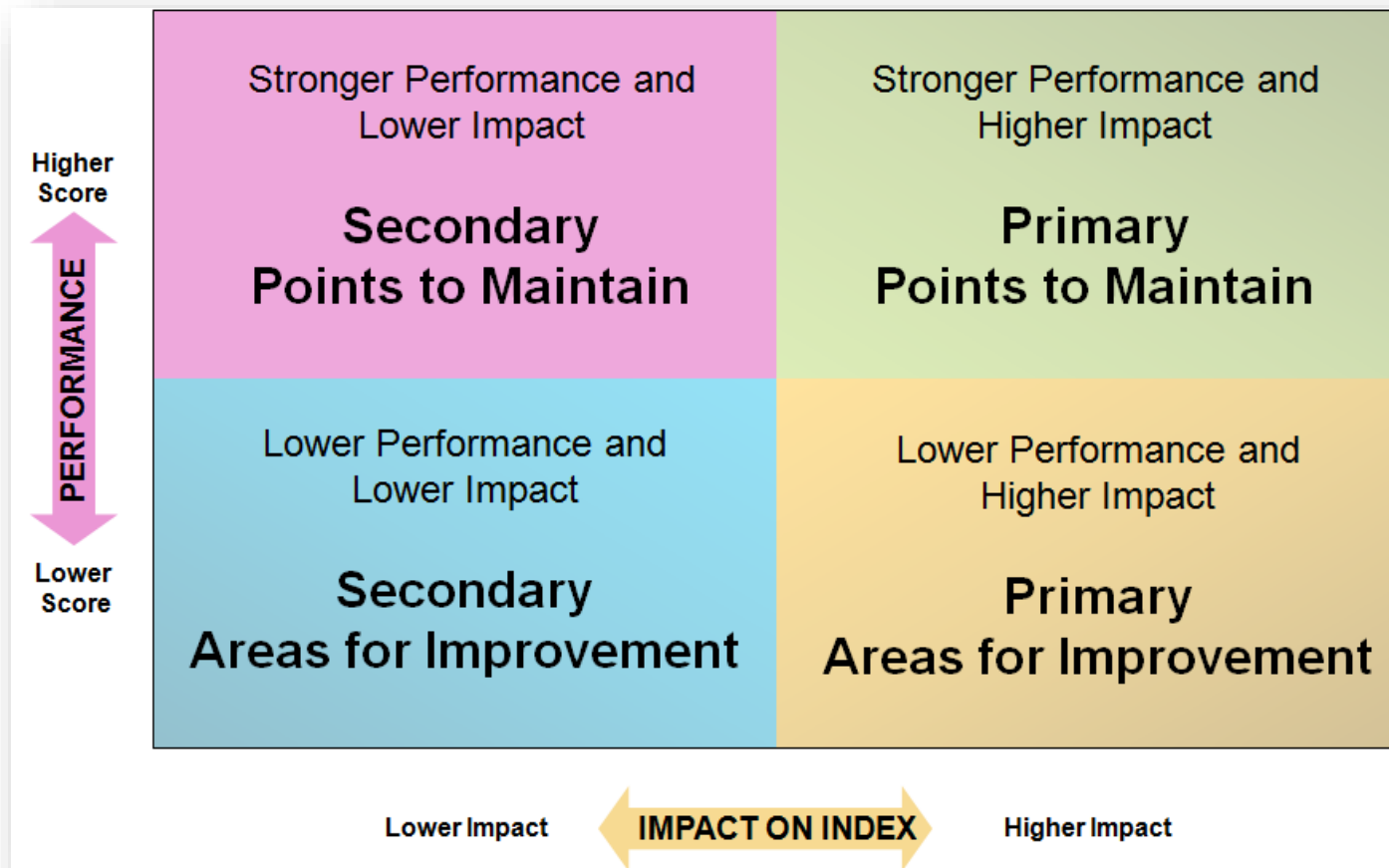
Low Impact

Priority Matrix

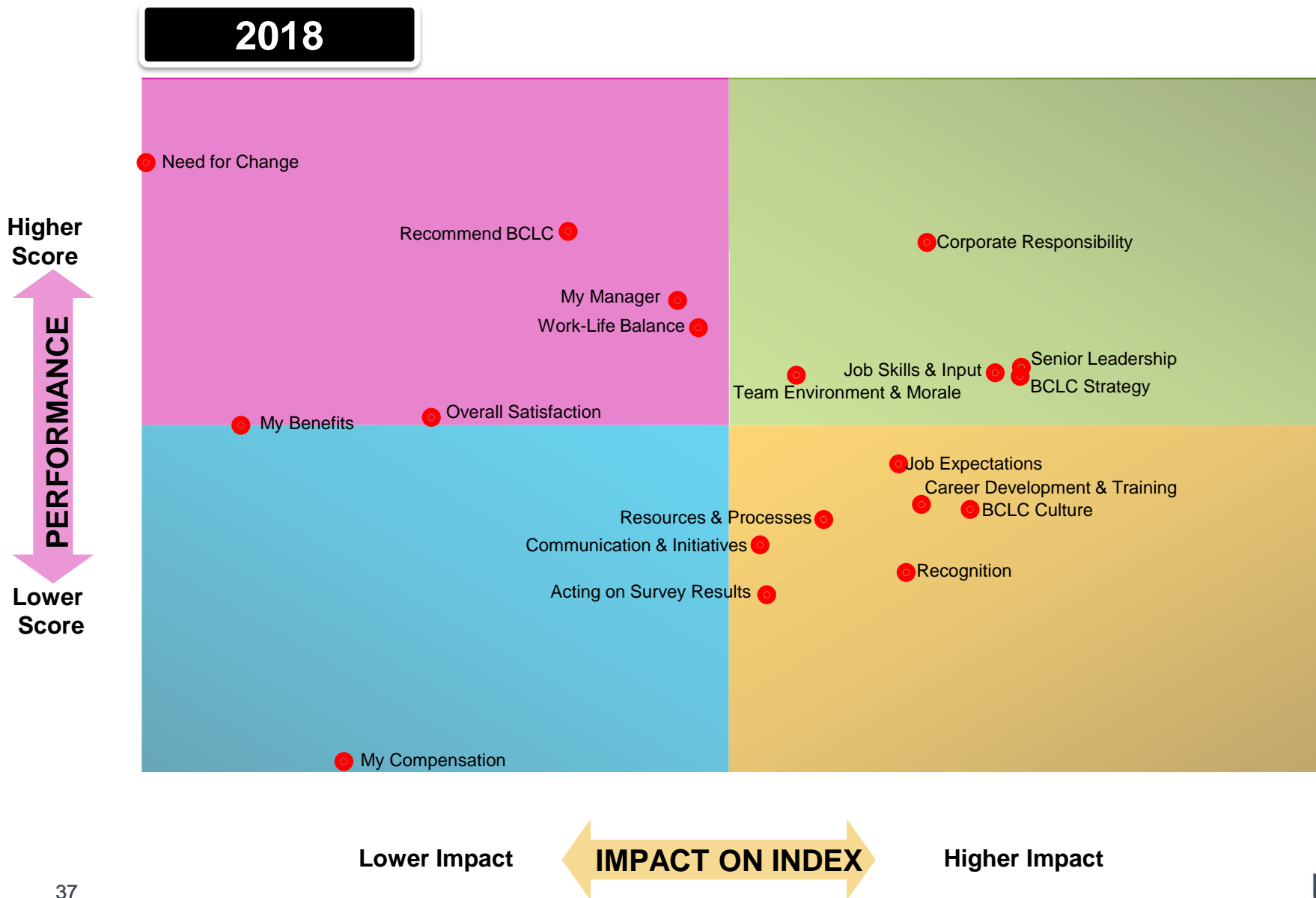
- ① Although causation is difficult to prove with any statistical tool, the goal of the matrix is to help determine which factors are highly associated with employee engagement as defined by BCLC, which is the dependent variable of the analysis.
- ① The Priority Matrix is a tool designed to help derive opportunities for improvement as well as areas of strength in relation to employee engagement.
 - The priority matrix takes each factor and simultaneously plots how BCLC performs on the factor as how strongly the factor is associated with employee engagement.
 - The metric used on the Performance axis is the average of the mean scores of the questions that make up the factor.
 - The metric used on the Association axis is the correlation of the factor to the BCLC Employee Engagement Index.
 - Therefore, a factor that has a strong association with employee engagement and high performance is an Area of Strength.
 - A factor that has a strong association with employee engagement and lower performance is a Priority Opportunity for Improvement.
- ① The axes and scales are adjusted to best display relative association and performance. Therefore, factors falling into the lower quadrants are not to be disregarded but interpreted relatively.

Understanding Priority Matrix

- Priority matrix is created by plotting the Performance (mean score of that attribute for BCLC Overall) against Impact on Index (derived impact using regression value).



Priority Matrix for BCLC



Primary Points to Improve

BCLC Culture

Career Development & Training

Recognition

Job Expectations

Resources & Processes

Acting on Survey Results

Communication & Initiatives

Primary Points to Maintain

Senior Leadership

BCLC Strategy

Job Skills & Input

Corporate Responsibility

Team Environment & Morale

Secondary Points to Maintain

Work-Life Balance

My Manager

Recommended BCLC

Overall Satisfaction

My Benefits

Need for Change

Secondary Points to Improve

My Compensation

Key Metrics

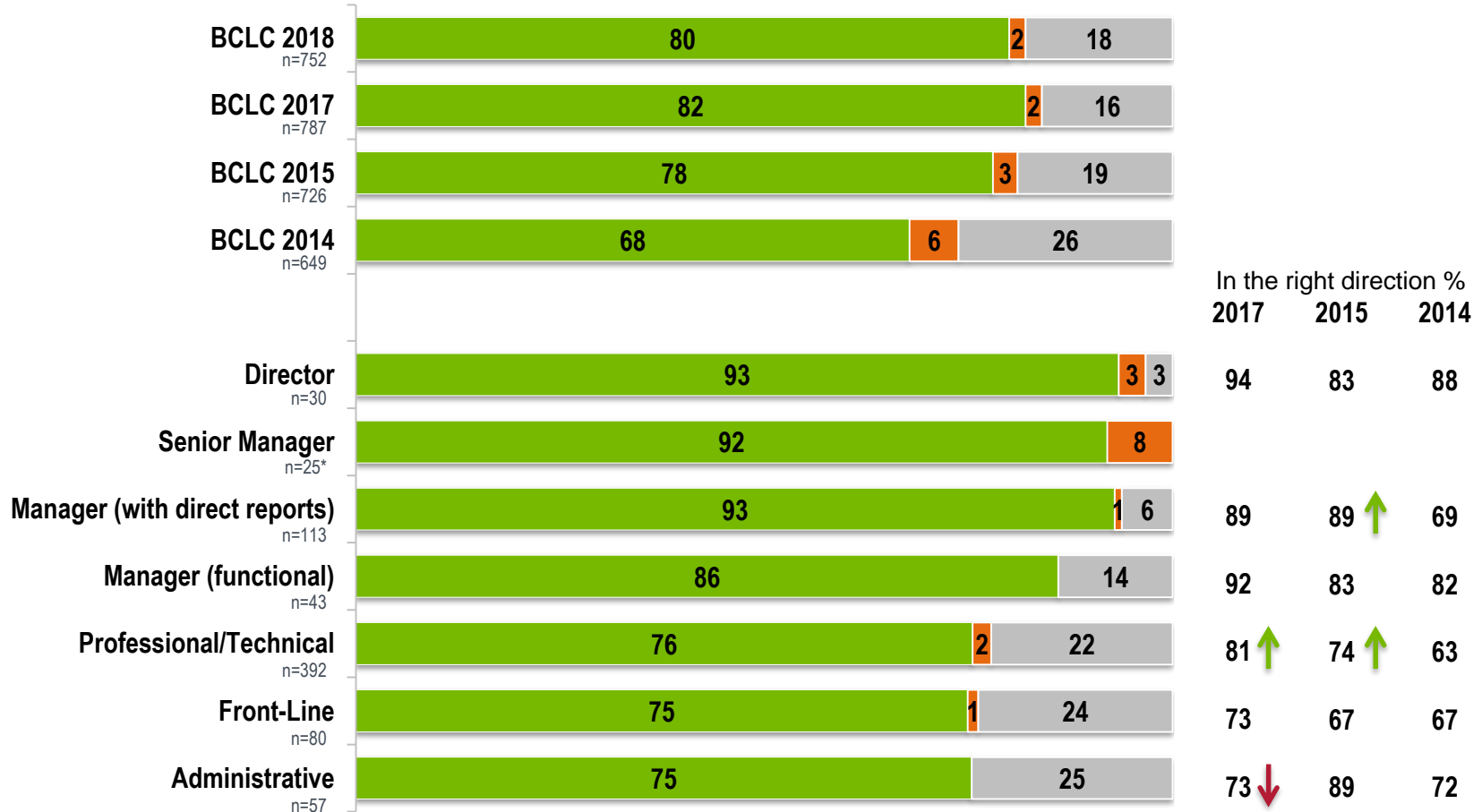


- ◎ **RED = Representative Employee Data**
- ◎ **RED** is a specific research program conducted by Ipsos, amongst a representative sample of employees working in companies of 100+ people.
- ◎ **RED** is not comprised of client data, it is conducted through an independent survey.
- ◎ The **RED** survey is conducted regularly across 33 countries, in over 20 sectors to provide up-to-date and relevant references.

Endorsement of Strategy

Do you believe that BCLC's strategy is moving ... (%)

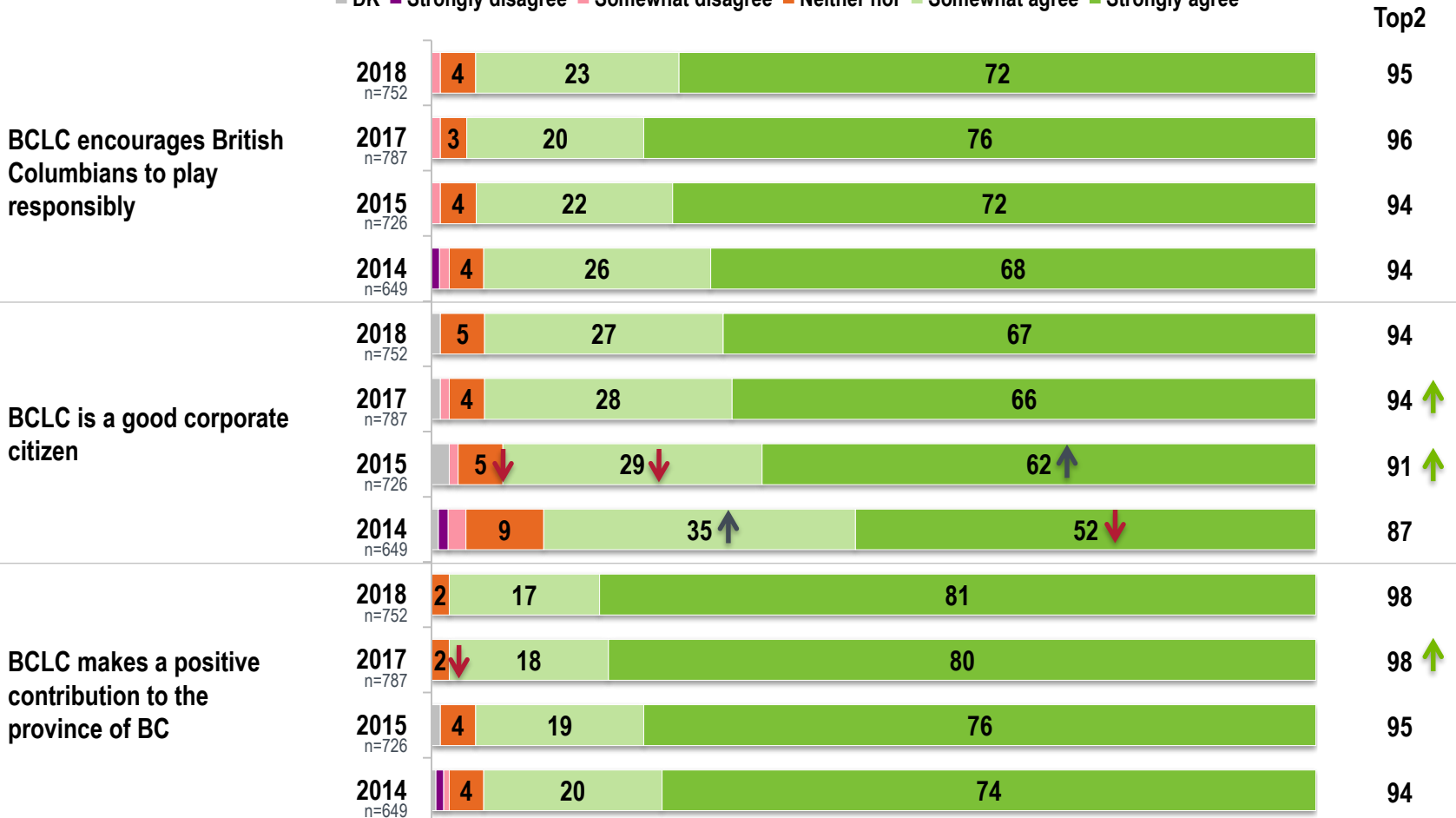
■ In the right direction ■ In the wrong direction ■ Don't know the strategy well enough to say



Corporate Dimensions

Please rate your agreement with the statements below ... (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



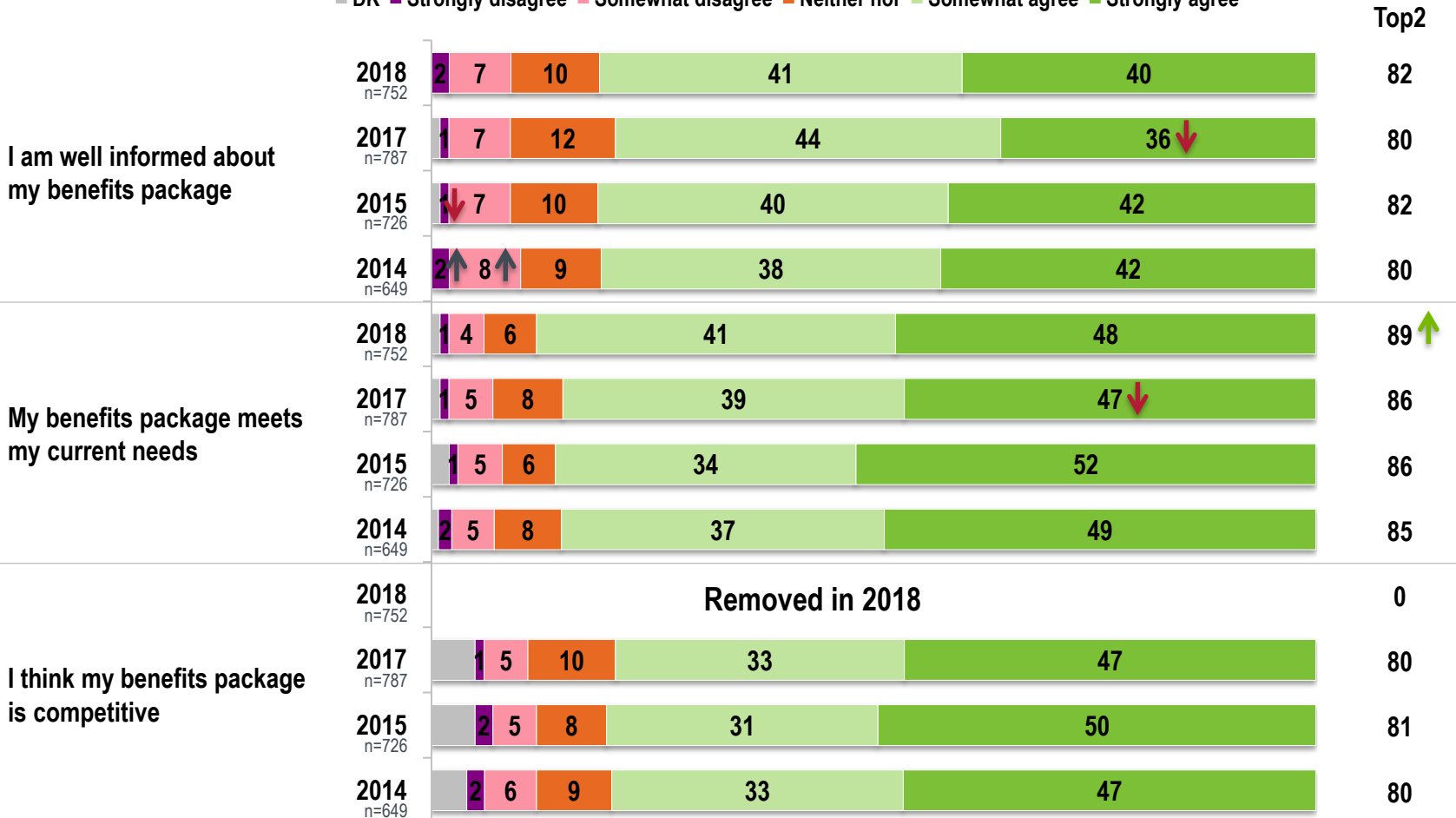
↑ Significant increase from last year

↓ Significant decrease from last year

Benefits Package

Please rate your agreement with the statements below ... (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



↑ Significant increase from last year ↓ Significant decrease from last year

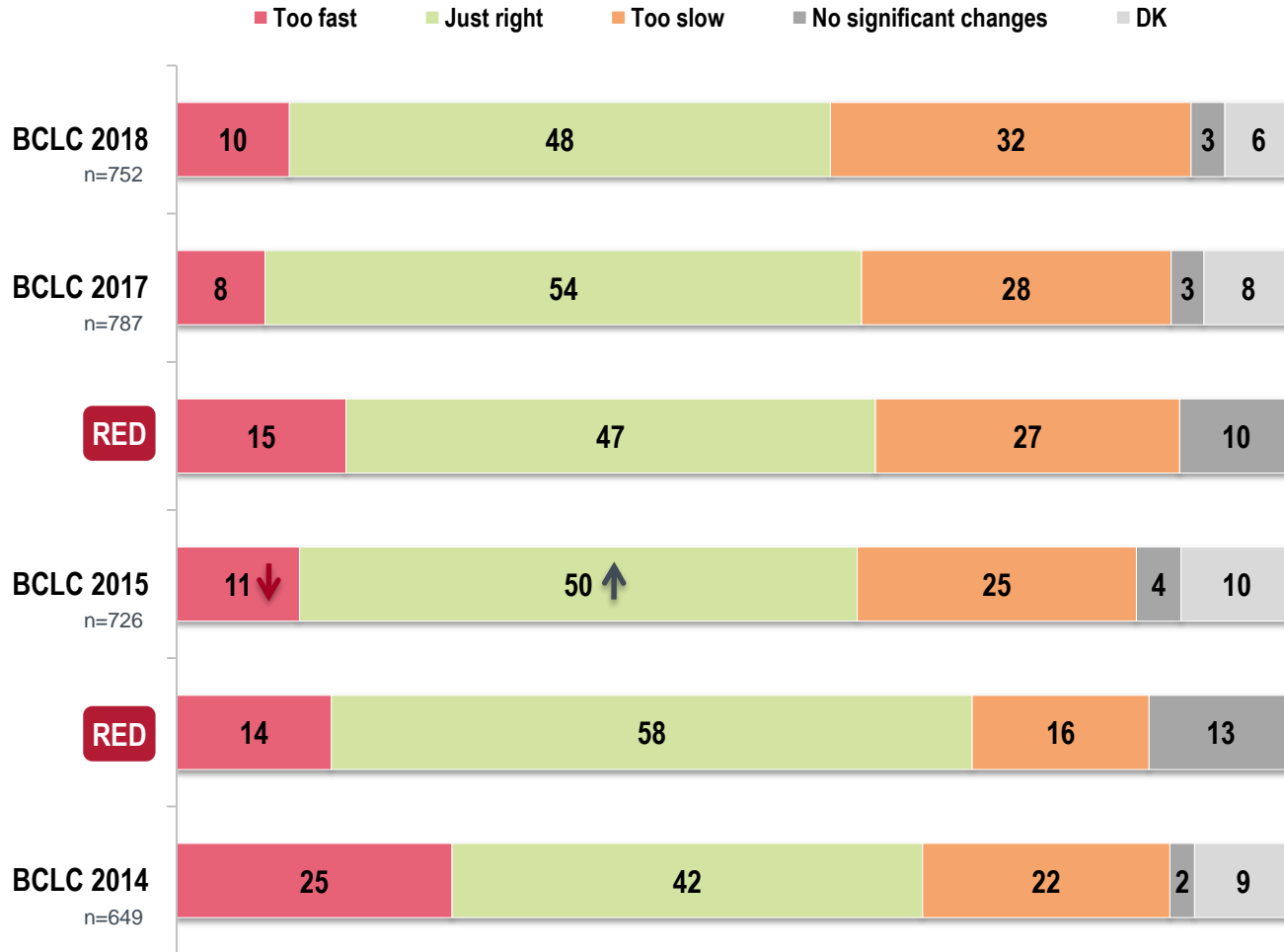
Overall Satisfaction

Overall, how satisfied are you with your job at the present time? (%)



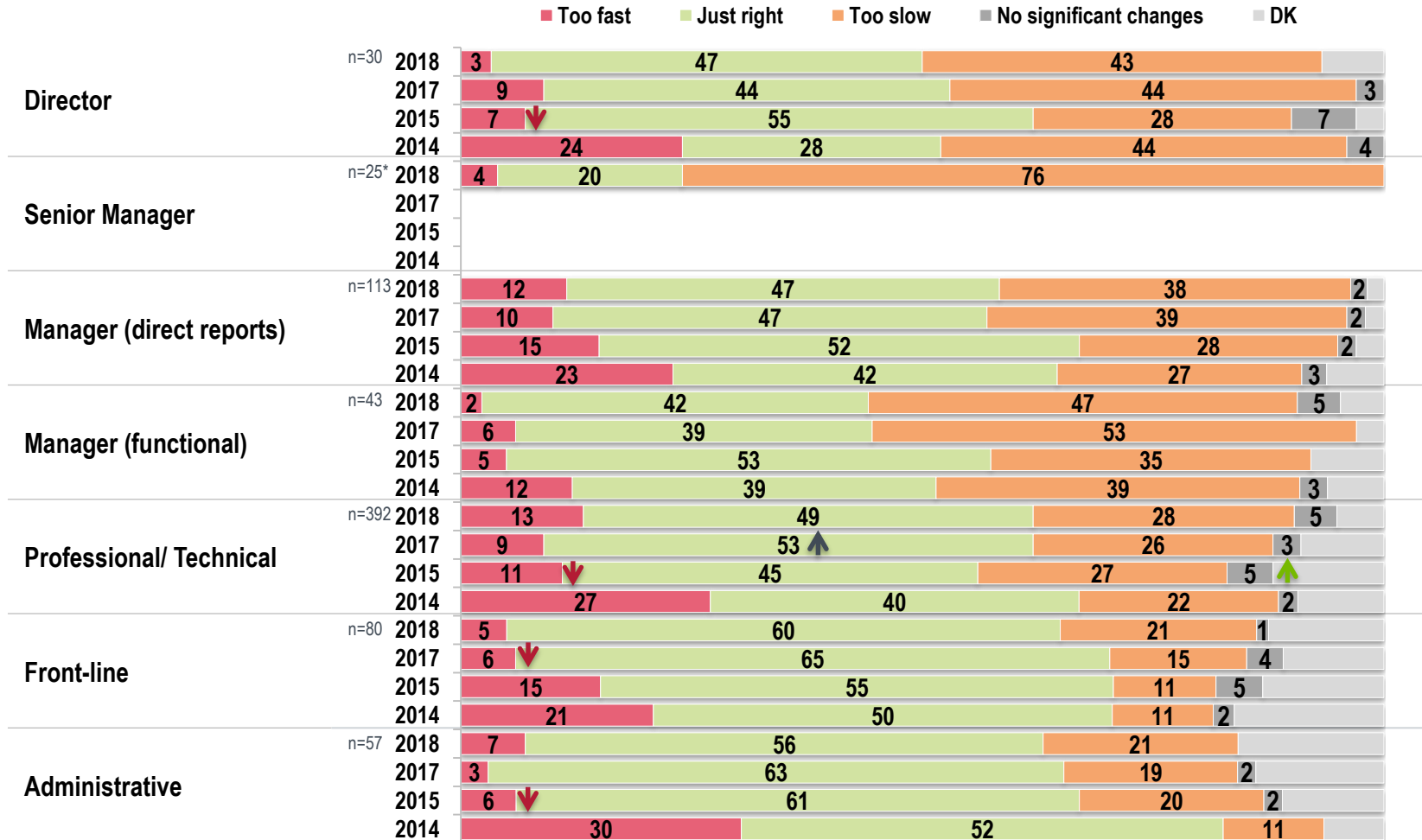
Pace of Change

How would you describe the current pace of change within BCLC? (%)



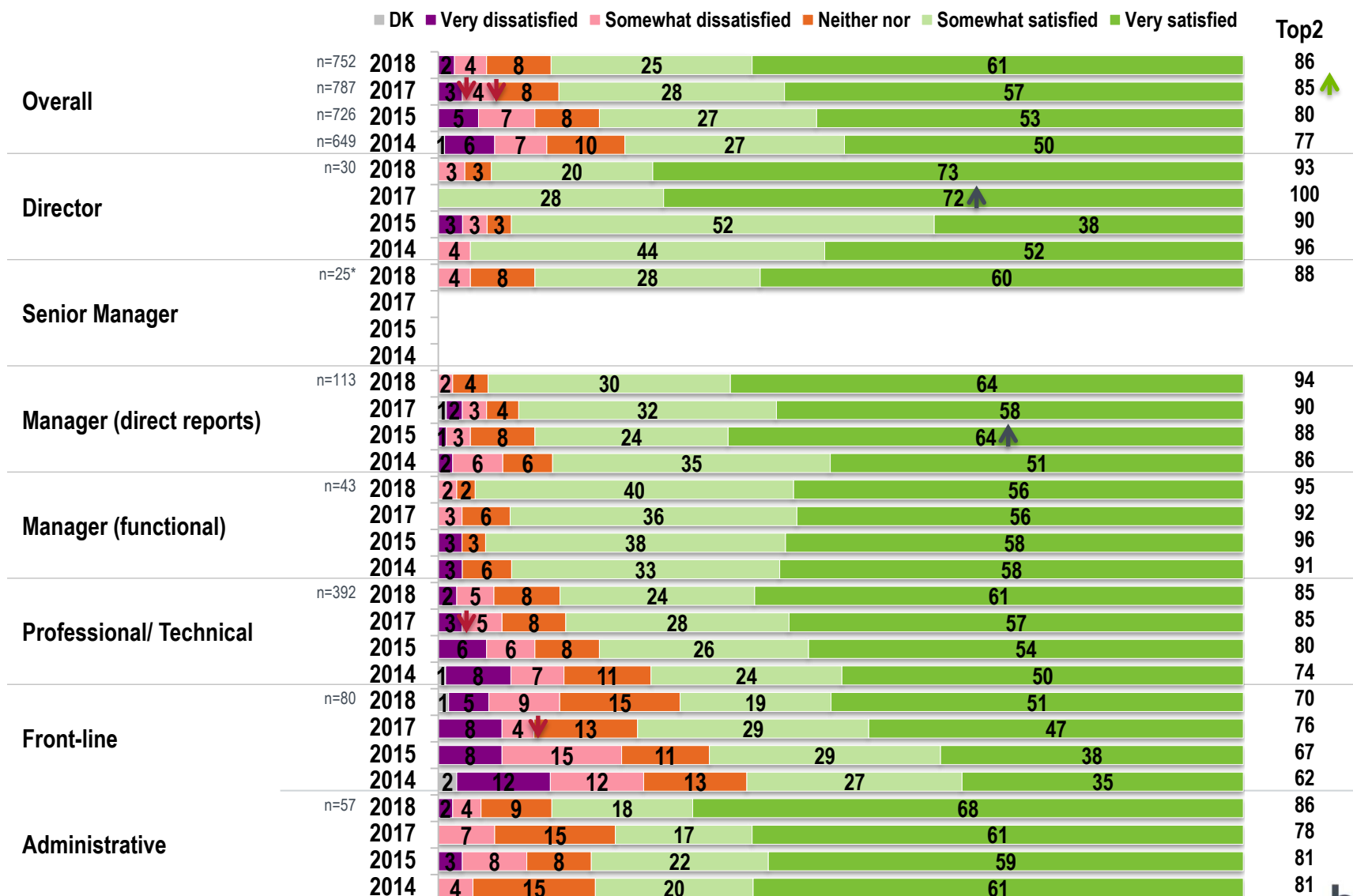
Pace of Change

How would you describe the current pace of change within BCLC? (%)



Satisfaction with Flexibility of Work Schedule

Please rate your satisfaction with ... The flexibility of the work schedule (%)



47 * Caution: Small base size



Significant increase from last year

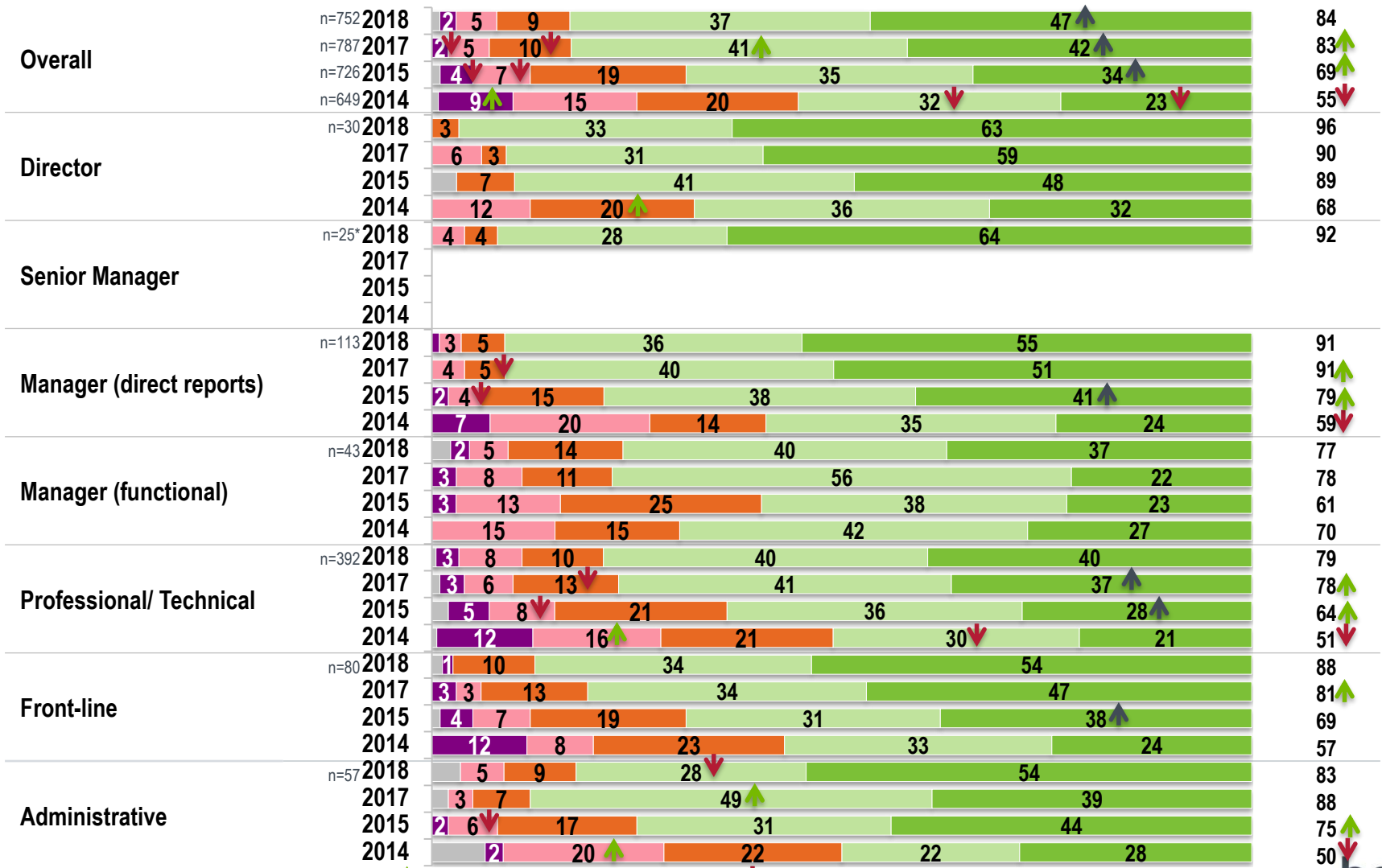


Significant decrease from last year

Care for Employee Well-Being

BCLC is genuinely interested in the well-being of its employees (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

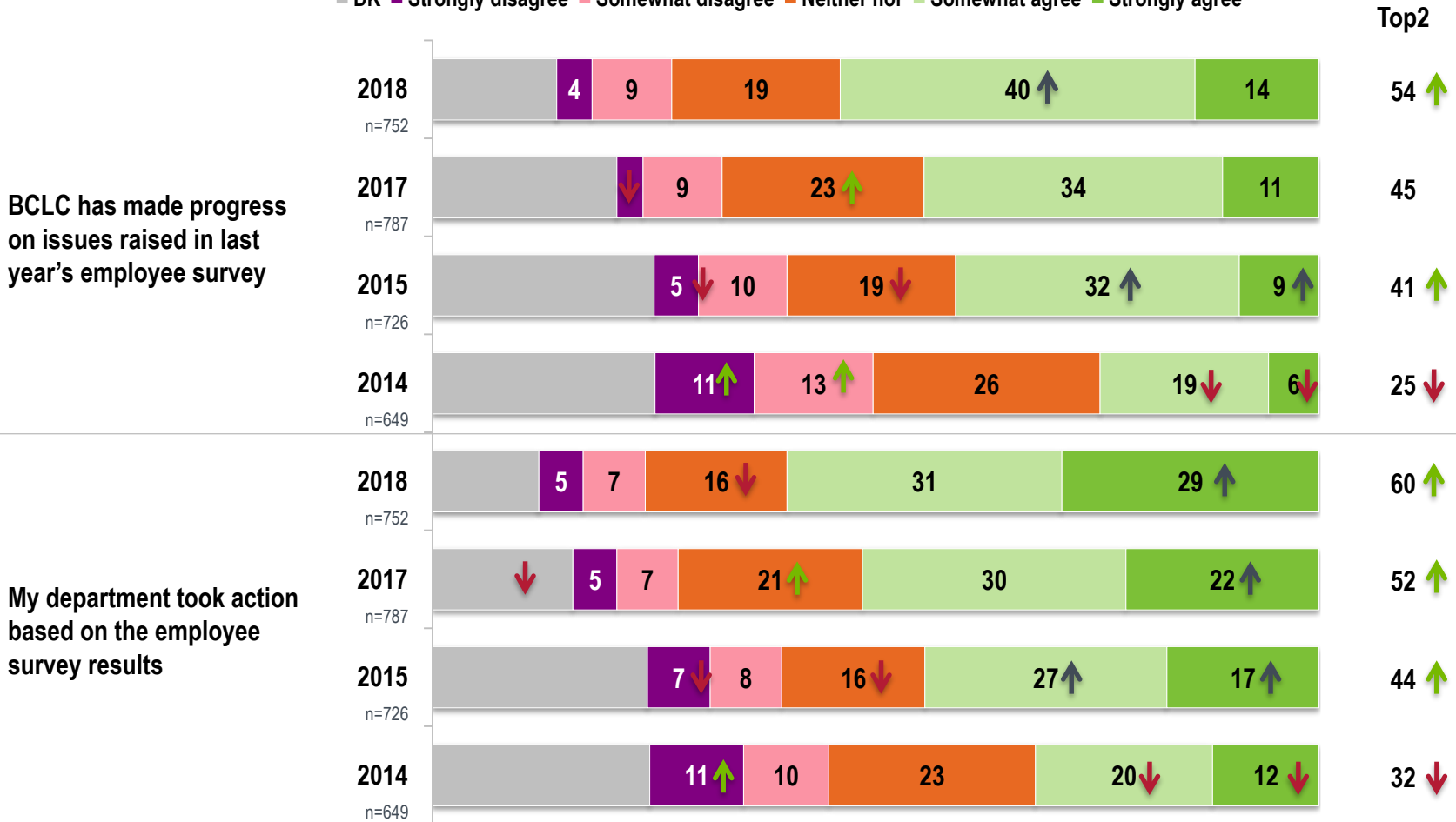


↑ Significant increase from last year ↓ Significant decrease from last year

Survey Follow Up

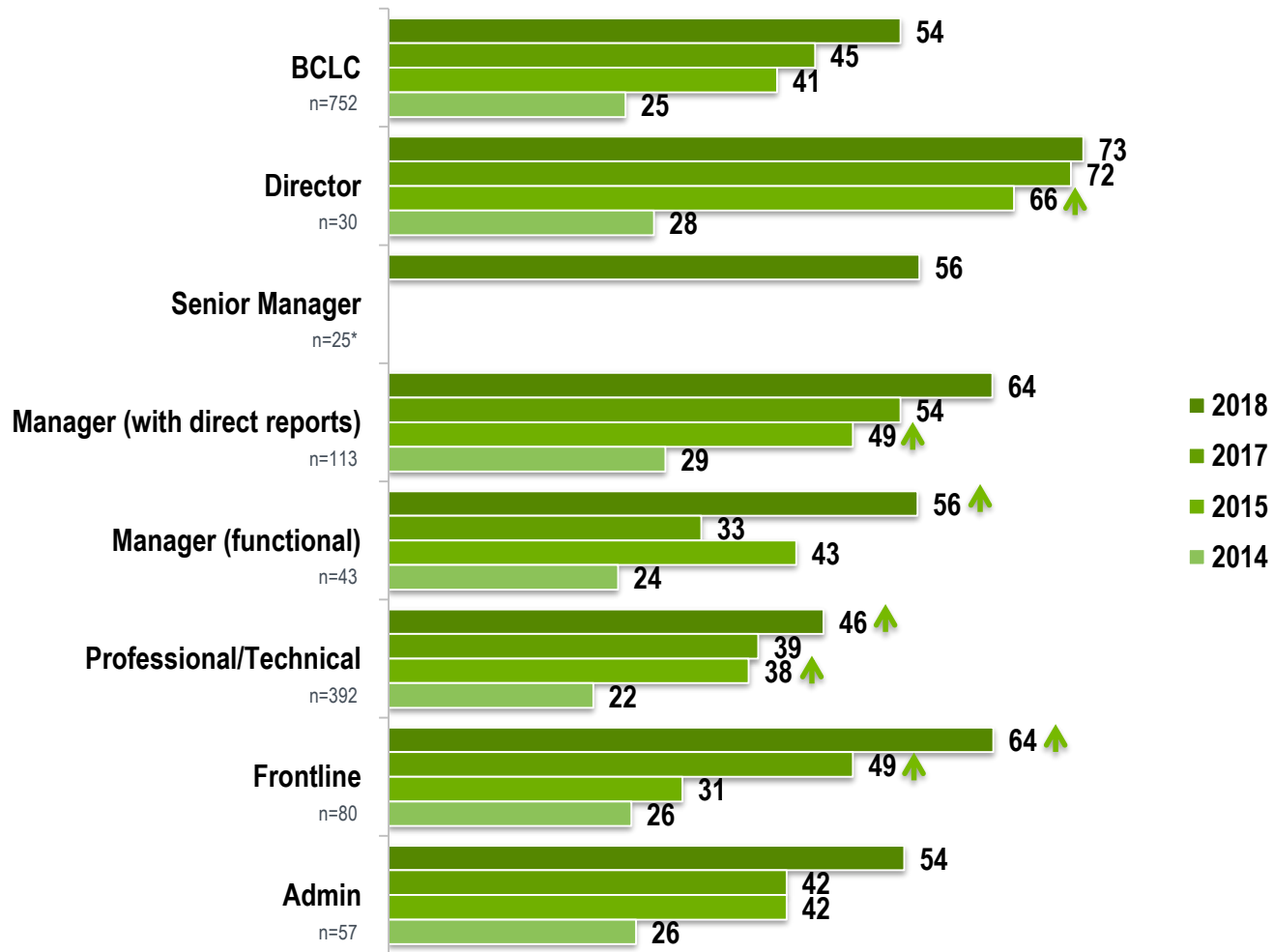
Please rate your agreement with the statements below ... (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



Survey Follow Up at Corporate Level

BCLC has made progress on issues raised in last year's employee survey (Top 2 Box %)

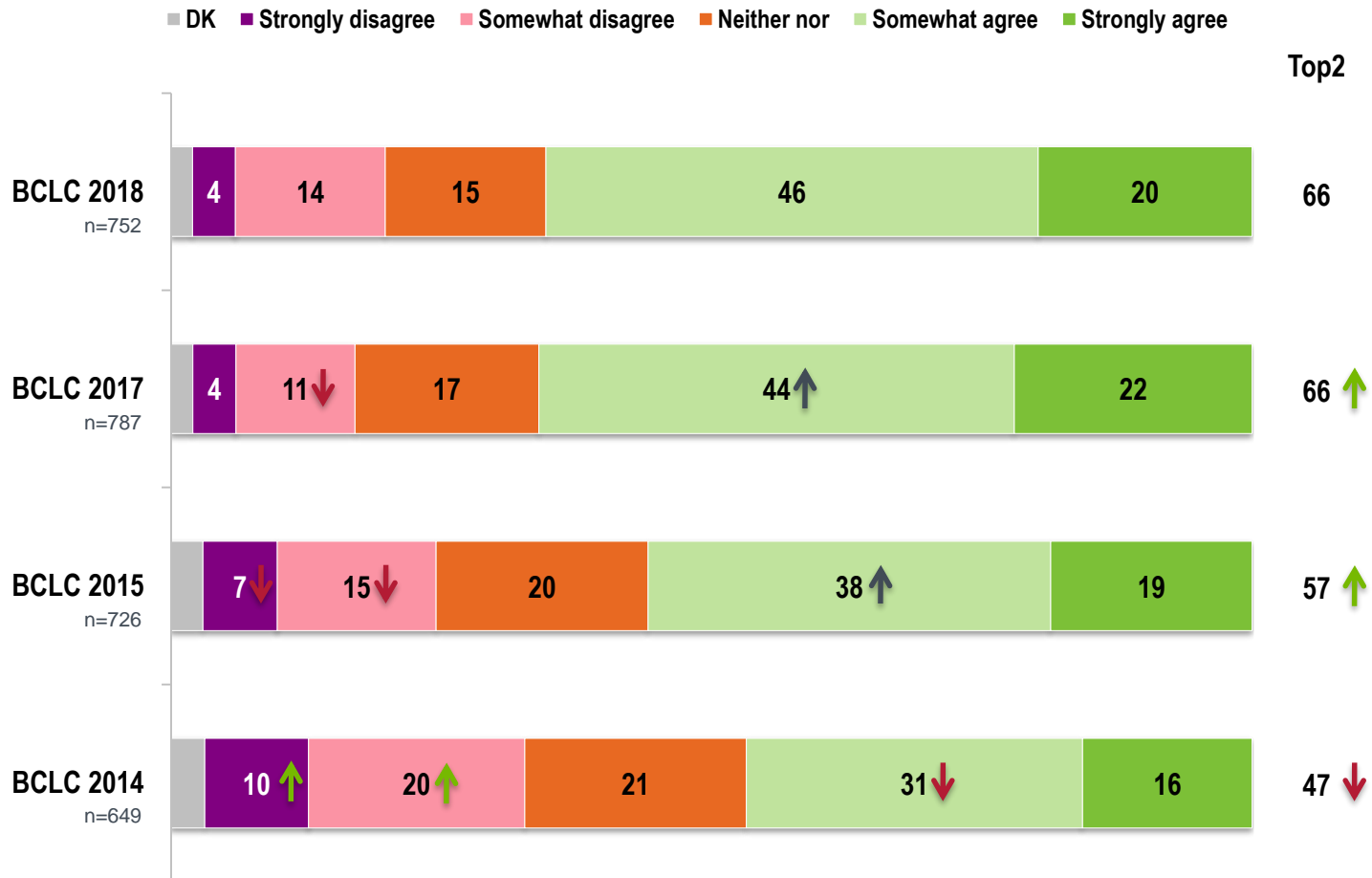


Significant increase from last year



Significant decrease from last year

BCLC is good at developing employees to their utmost potential (%)



Work-Life Balance

Please rate your satisfaction with ... The balance between private and professional life (%)

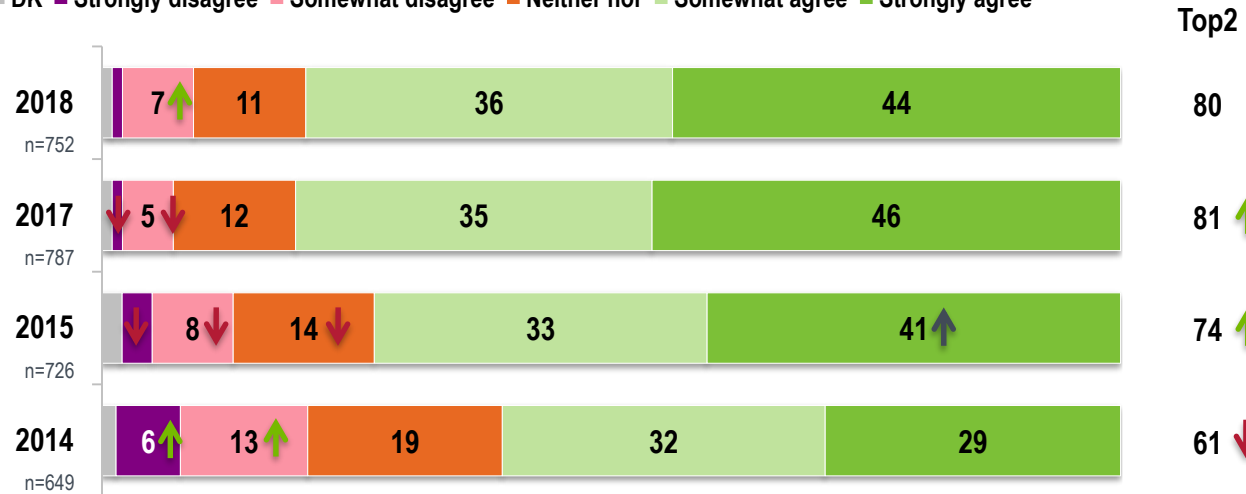


Perceptions of the Leadership Team

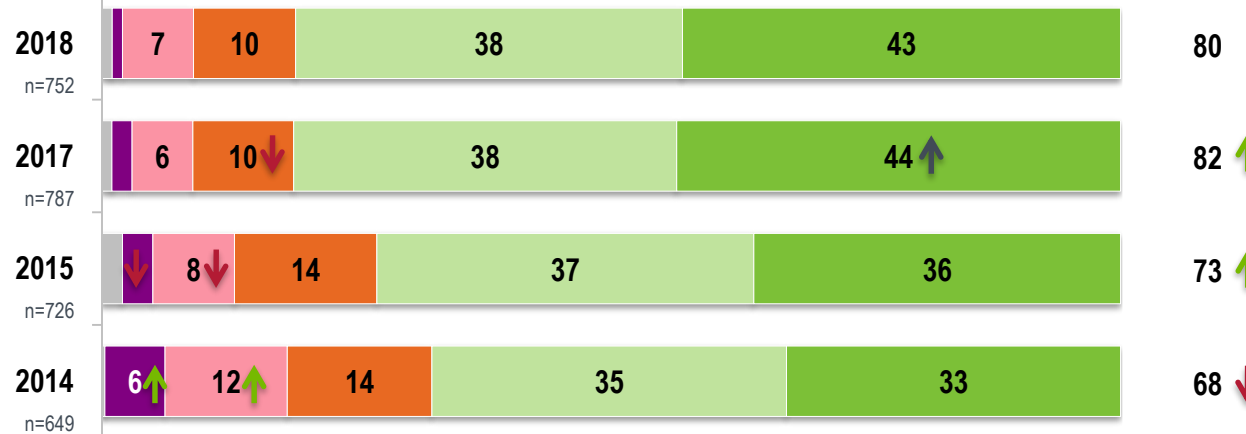
Please rate your agreement with the statements below ... (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

I have confidence in the decisions made by the Senior Leadership team (CEO, VPs and Directors) or BCLC

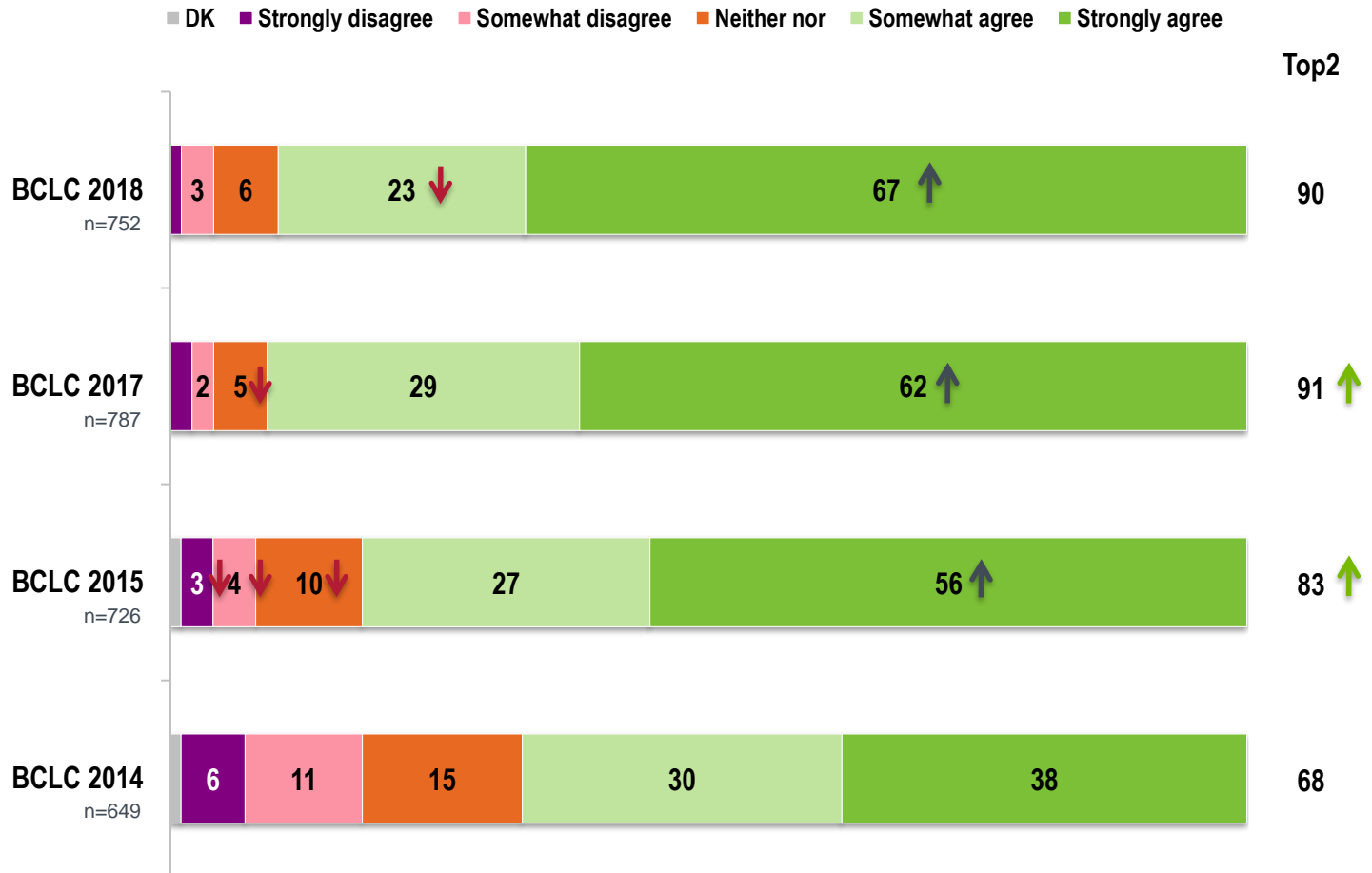


The entire Senior Leadership team (CEO, VPs and Directors) communicates a clear vision of where BCLC is going



Would Recommend

I would recommend BCLC as an employer to a friend or family member (%)



Why BCLC is Moving in the Right Direction?

■ in the right direction ■ in the wrong direction ■ I don't know

Do you believe that BCLC's strategy is moving: (%)



Why do you believe that BCLC's strategy is moving in the right direction? (%) Top 3 Responses

(Base: Those who said "in the right direction" in Q26 – n=601)



"Being open to change and considering how the player base is changing is very important. Getting cloud ready and being more agile will help us deliver our services in new ways. I attended the innovation session and was very impressed with the ideas and can see that BCLC is on the right track to engage a new player base."

"BCLC continues to change and look for new content for its players to keep them engaged and entertained. BCLC also continues to ask their customers for feedback on what they do or don't like with their experience in gaming."

"The marketplace requires companies to be able to shift quickly and adapt and BCLC is striving to do those things to continue to be competitive. Focusing on the future of gaming, while continuing to be an incredibly successful corporation can be very stressful to balance though."

"We've done the research and due diligence so we have a clear plan in place."

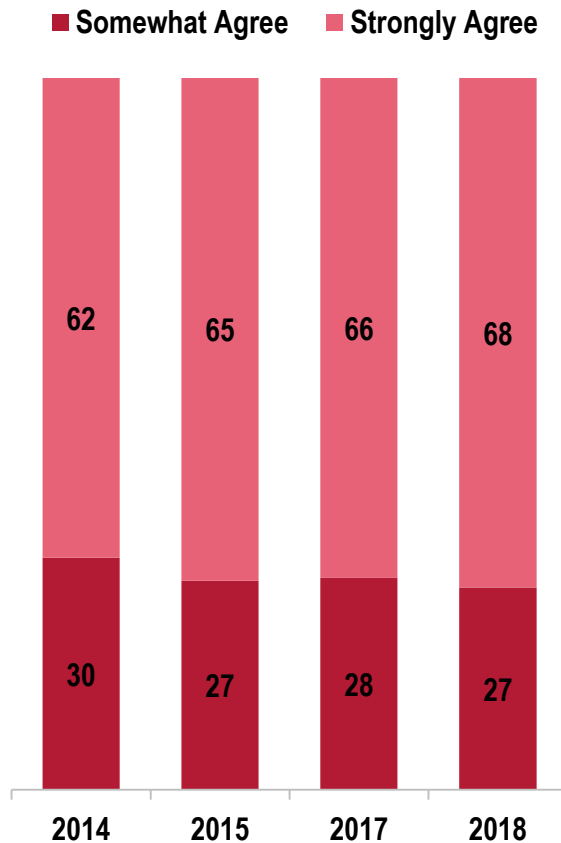
"Improved focus on developing and supporting employees in their current roles and is dedicated to becoming an agile, automated work place where work doesn't drag on for weeks and months."

"BCLC is doing a great job addressing the negative press issues lately. Gamesense brand is recognised around the world for player health and the technology we introduced is being recognised and adopted in other provinces. I believe we are the leading province in gaming."

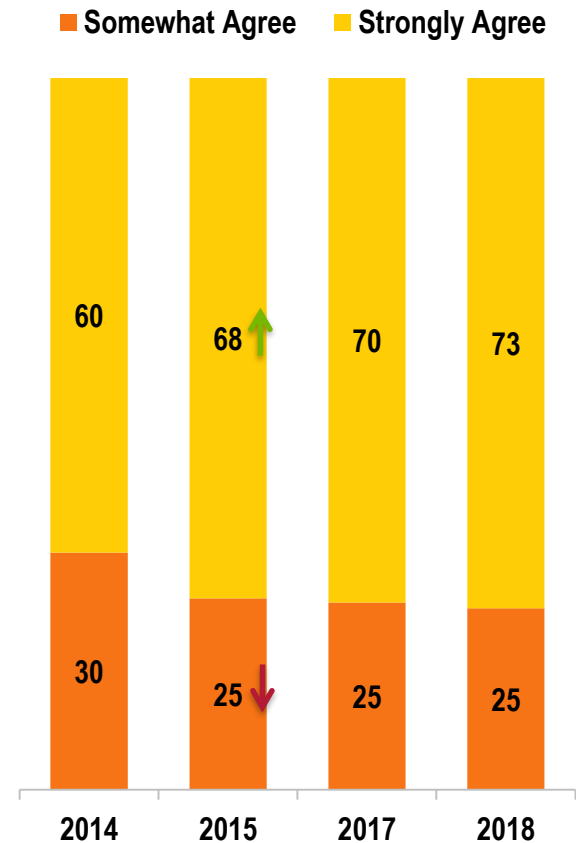
Note: All 15 employees who believe that BCLC is moving in the 'wrong' direction chose 'Don't Know' when asked to explain their response.

Change Measures

Understand Need For Change (%)



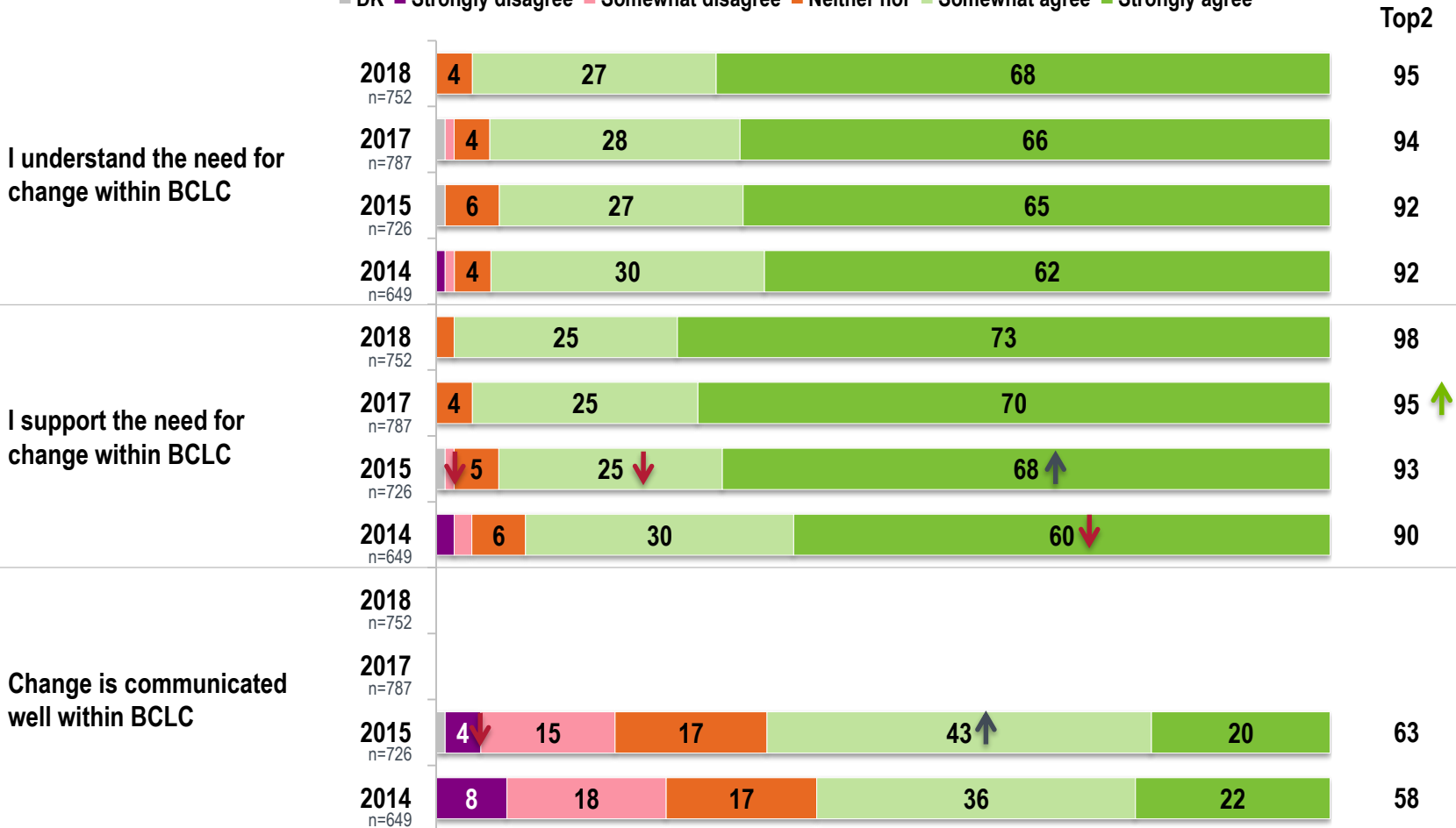
Support Need For Change (%)



Need for Change – Understanding and Support

Please rate your agreement with the statements below ... (%)

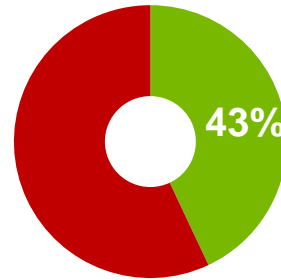
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



BCLC Agility Index

Agility Index: Total BCLC

Overall
Agility
Score



■ Agile

2017: 46% Agile

Rigid	2018	35%	35%	30%	Agile
	2017	32%	36%	32%	
Bureaucratic	2018	54%	34%	13%	Not Bureaucratic
	2017	51%	33%	16%	
Not Entrepreneurial	2018	35%	37%	29%	Entrepreneurial
	2017	37%	37%	27%	
Risk Avoiding	2018	47%	36%	18%	Risk-taking
	2017	44%	36%	20%	
Directive	2018	31%	44%	25%	Participative
	2017	28%	43%	29%	
Secretive	2018	29%	37%	34%	Open
	2017	27%	35%	38%	
Adverse to Change	2018	23%	33%	44%	Open to Change
	2017	21%	33%	46%	



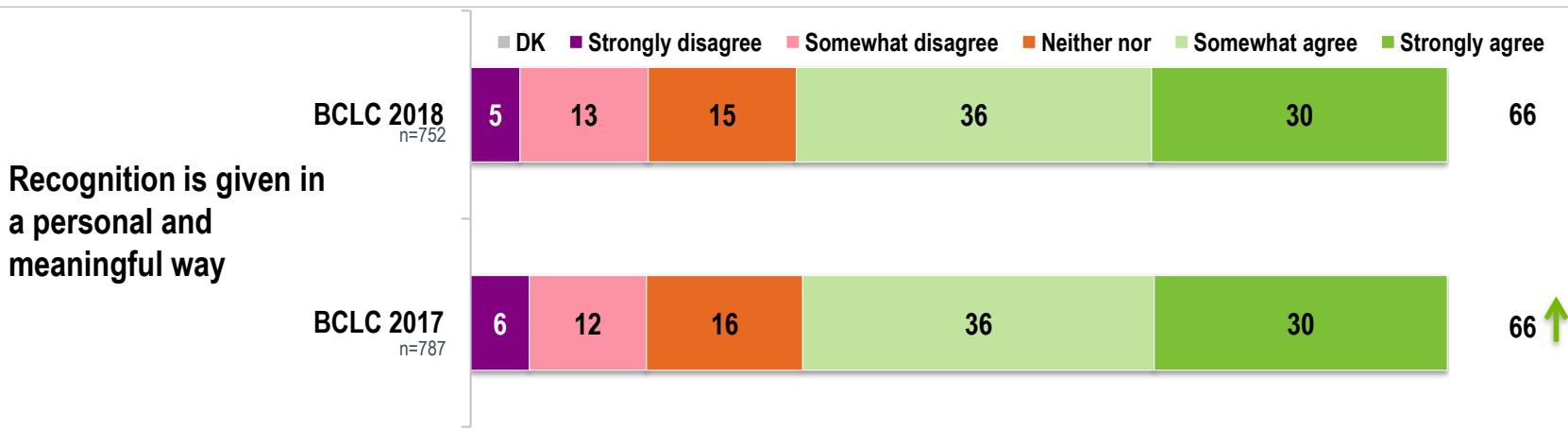
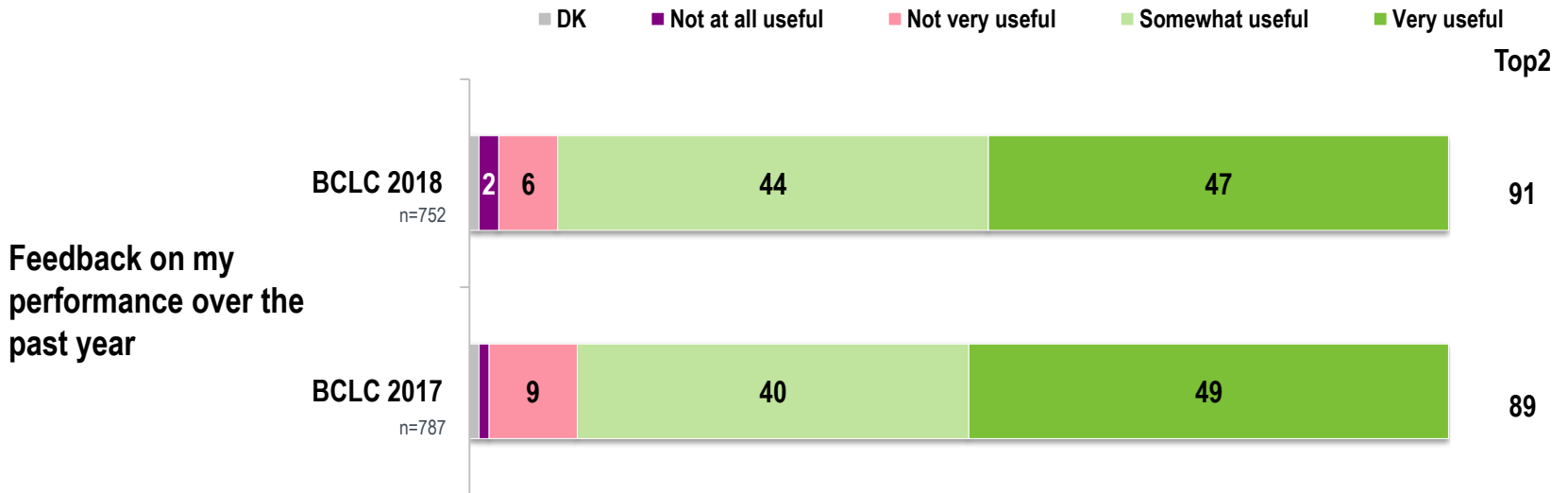
Significant increase from last year



Significant decrease from last year

The Employee Experience Index

Feedback and Recognition



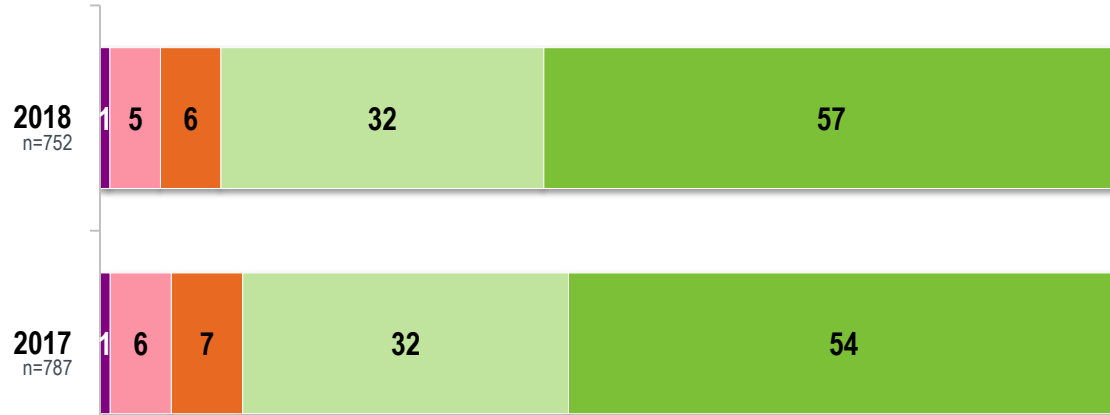
↑ Significant increase from last year ↓ Significant decrease from last year

Skill Fit and Valuing Diversity

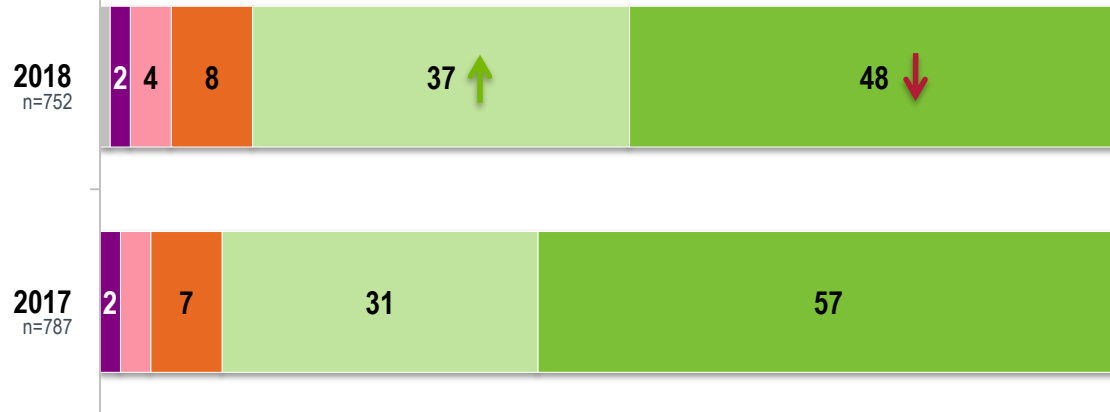
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

Top2

My role is a good fit with my skills



Our team values one another's unique strengths and different abilities



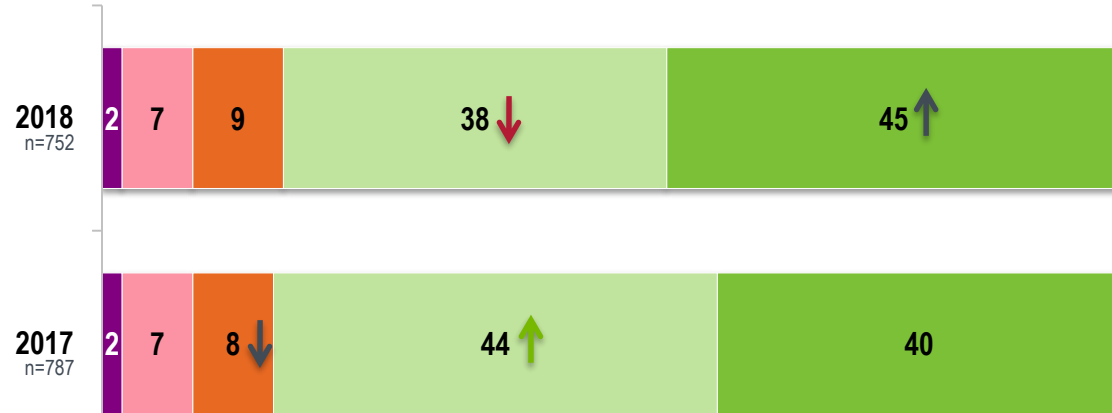
↑ Significant increase from last year ↓ Significant decrease from last year

Employee influence

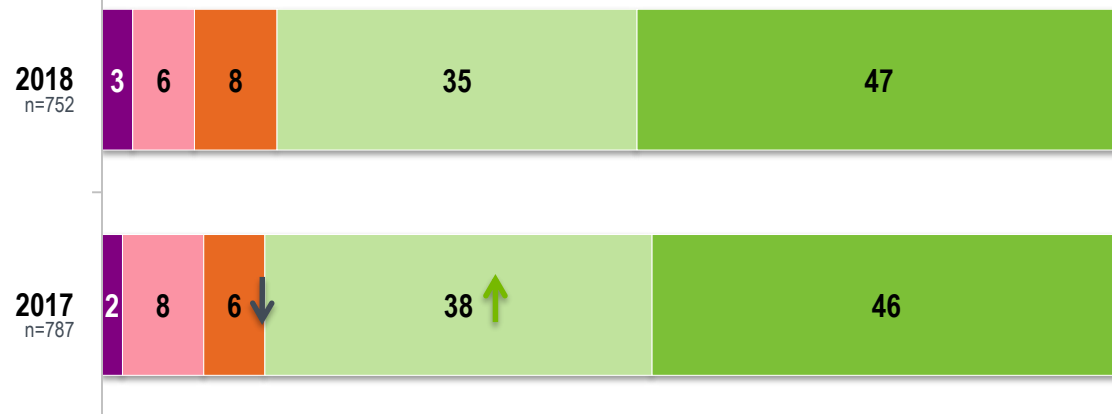
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

Top2

I can influence my workplace through my ideas and involvement

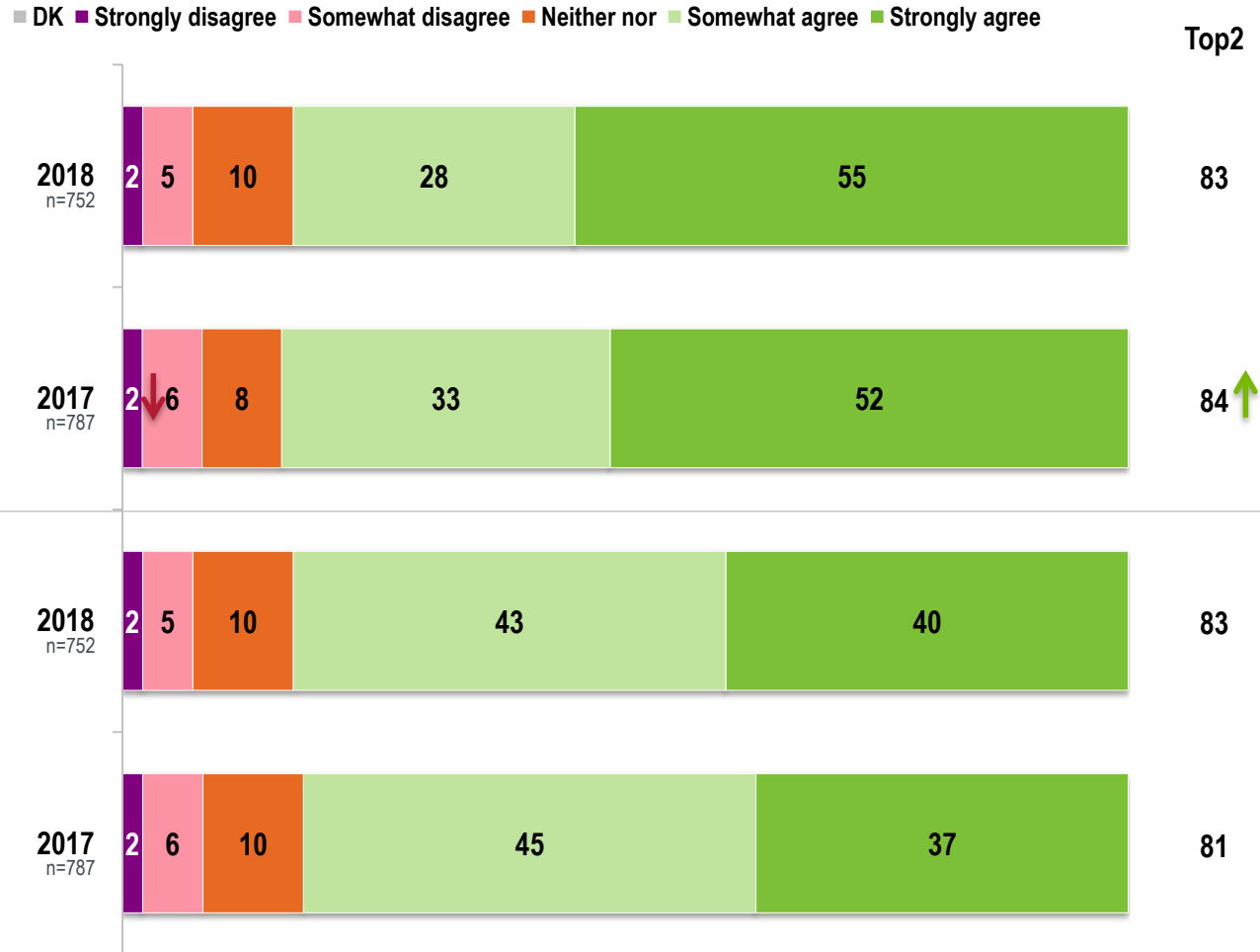


I have opportunities to provide input into decisions that affect my work



↑ Significant increase from last year ↓ Significant decrease from last year

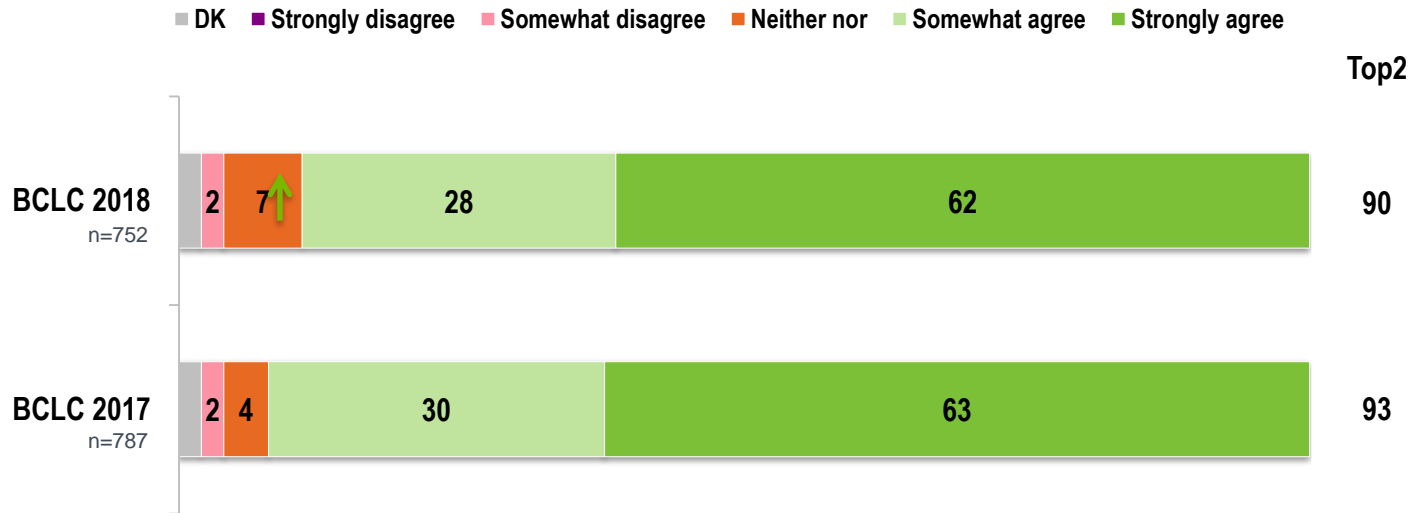
Work-Life balance and Personal Accomplishment



↑ Significant increase from last year ↓ Significant decrease from last year

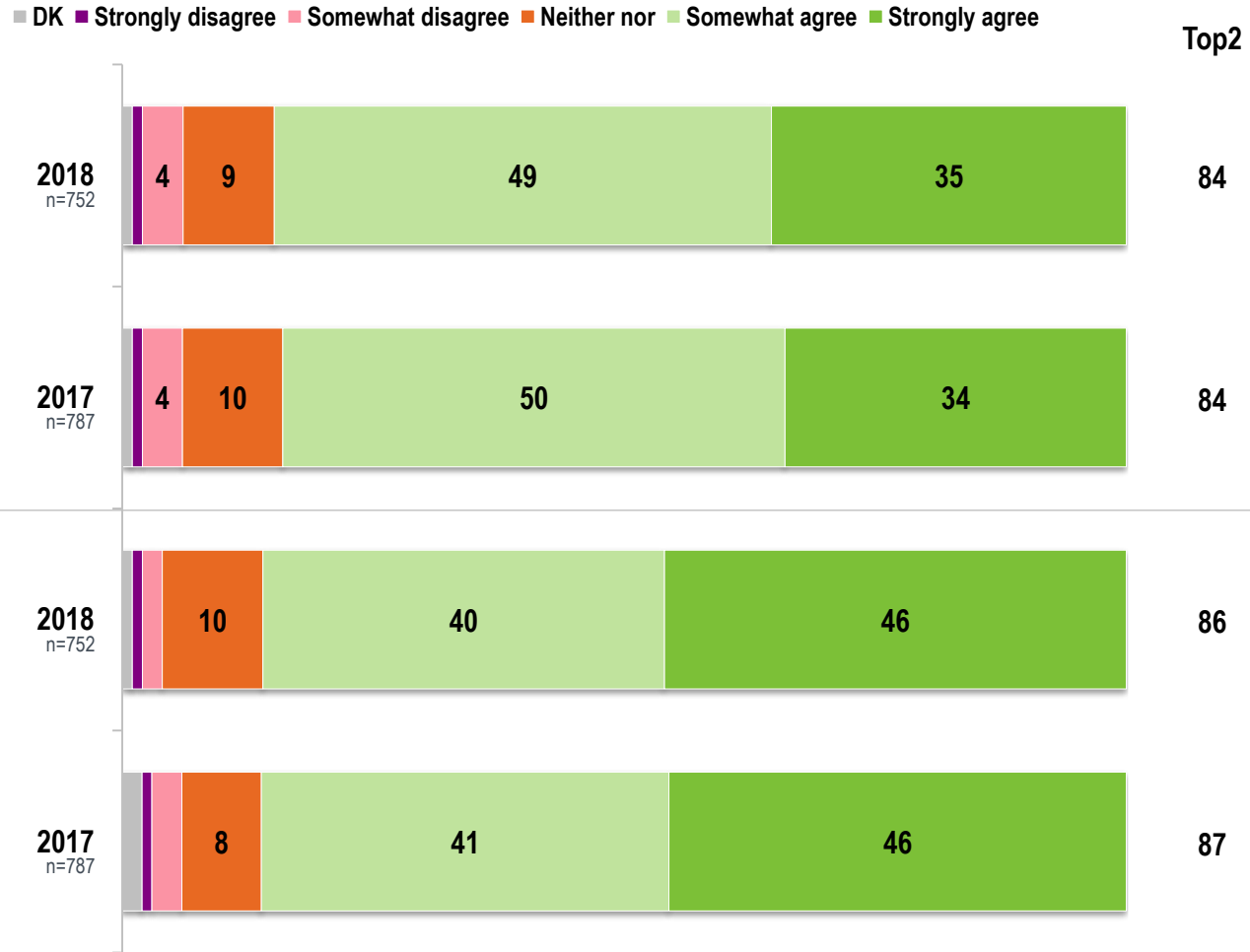
Business Conducted Fairly

BCLC consistently conducts business in a fair, honest, and trustworthy manner (%)



BCLC Strategic Alignment Index & Cultural Drivers

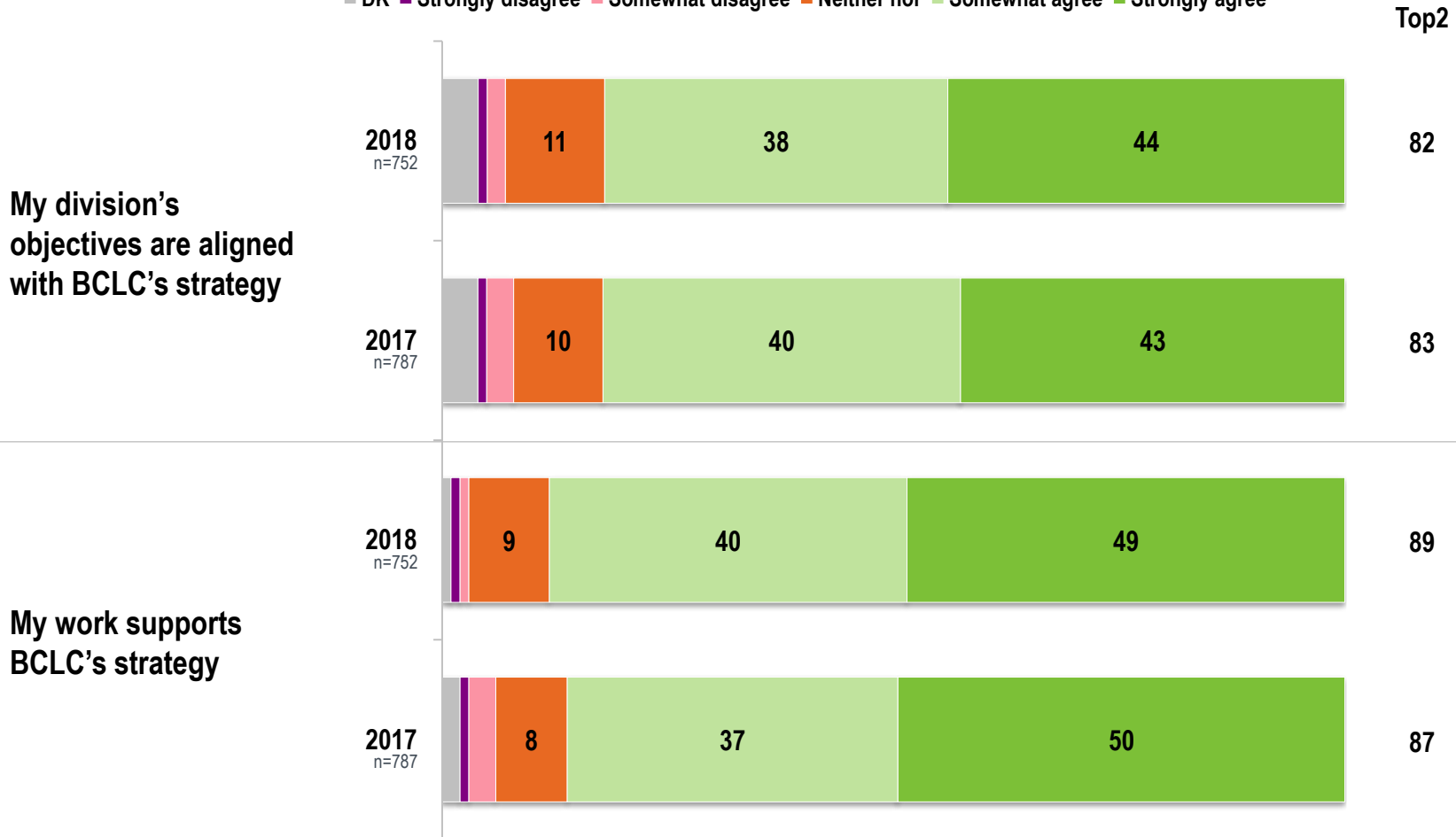
Understanding of BCLC's Strategy



↑ Significant increase from last year
 ↓ Significant decrease from last year

Alignment of BCLC's Strategy

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

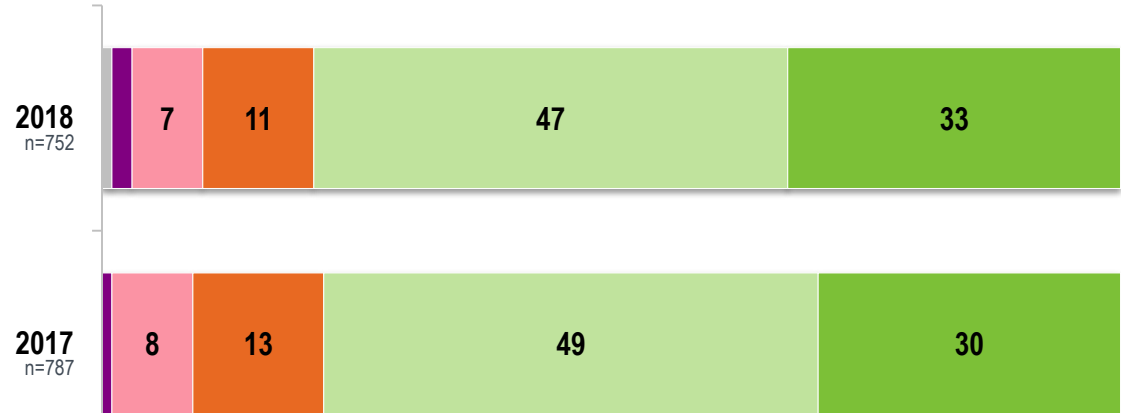


↑ Significant increase from last year ↓ Significant decrease from last year

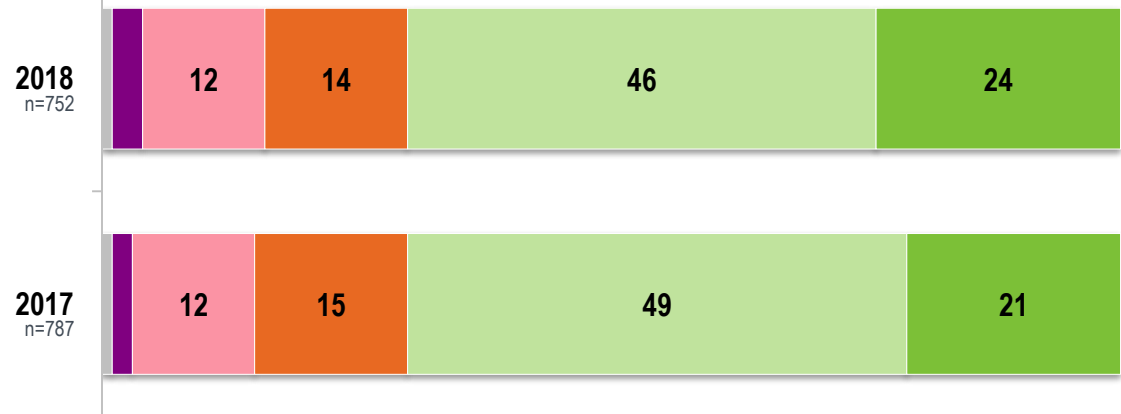
Trust & Collaboration

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

BCLC has a culture of building trust



Teams and people are highly collaborative



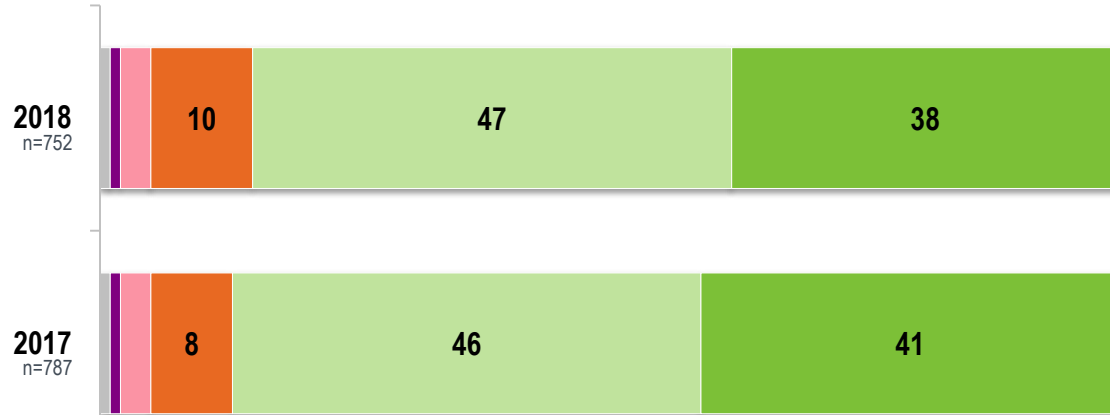
↑ Significant increase from last year ↓ Significant decrease from last year

Customer Focus & Embracing Change

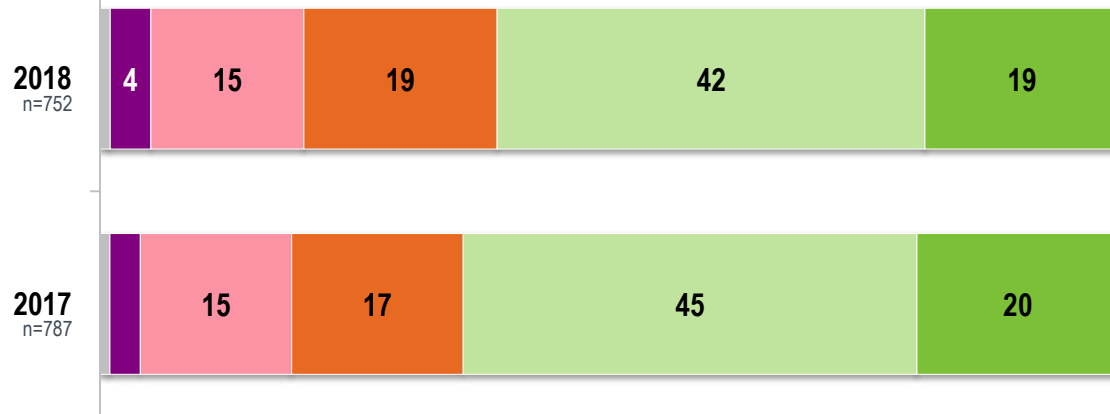
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

Top2

BCLC is customer focused



Change is widely embraced



↑ Significant increase from last year ↓ Significant decrease from last year

BCLC Social Responsibility Issues

Most Important Social Responsibility Issues

Issue	% Mentioned	% Ranked 1 st *
Anti-money laundering	59%	17%
Reducing gambling-related harms	53%	10%
Attracting and retaining talent	48%	17%
Transparency	45%	9%
Widening the player base	40%	8%
Direct community benefits	38%	4%
Privacy & security	35%	6%
Integrity of games	29%	6%
Financial contributions to the province of BC	28%	4%
Ethical Conduct	26%	8%
Increasing safer play	24%	2%
Service provider and retailer success	20%	3%
Diversity and Inclusion	19%	2%
Waste management	13%	2%
Sustainable procurement	11%	0%
Climate change	9%	1%

Top 5 Social Responsibility Issues

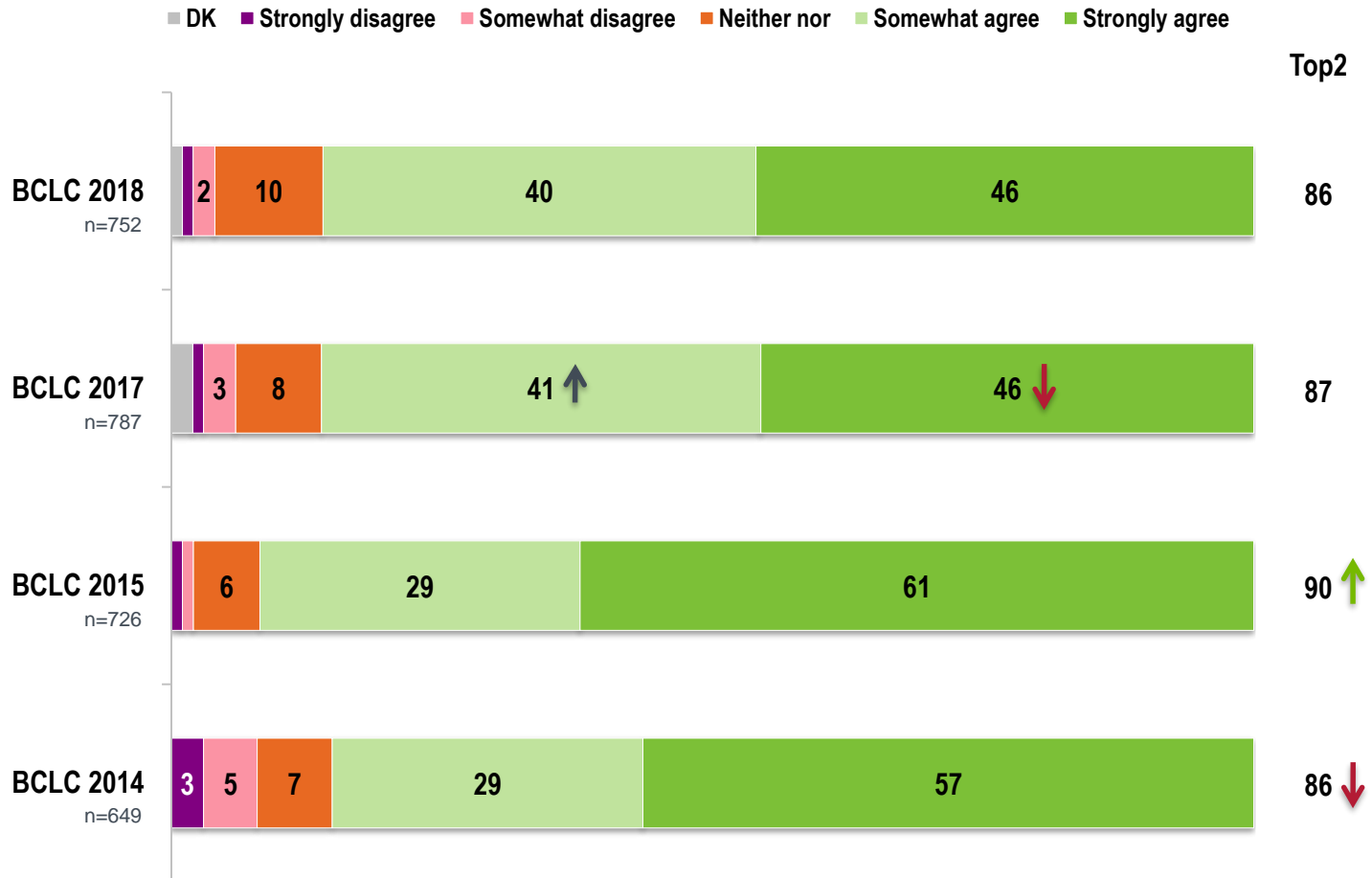


* Percentage ranked 1st values are based on those who selected the issue and ranked it

The Employee Experience

Role Supports Business Objectives

I understand how my role supports BCLC's strategy (%)*



Input in Goal Setting

I have had sufficient input into determining the goals for my job (%)



Motivated to Exceed Requirements

I am motivated to go beyond what is required in my role to help BCLC succeed (%)



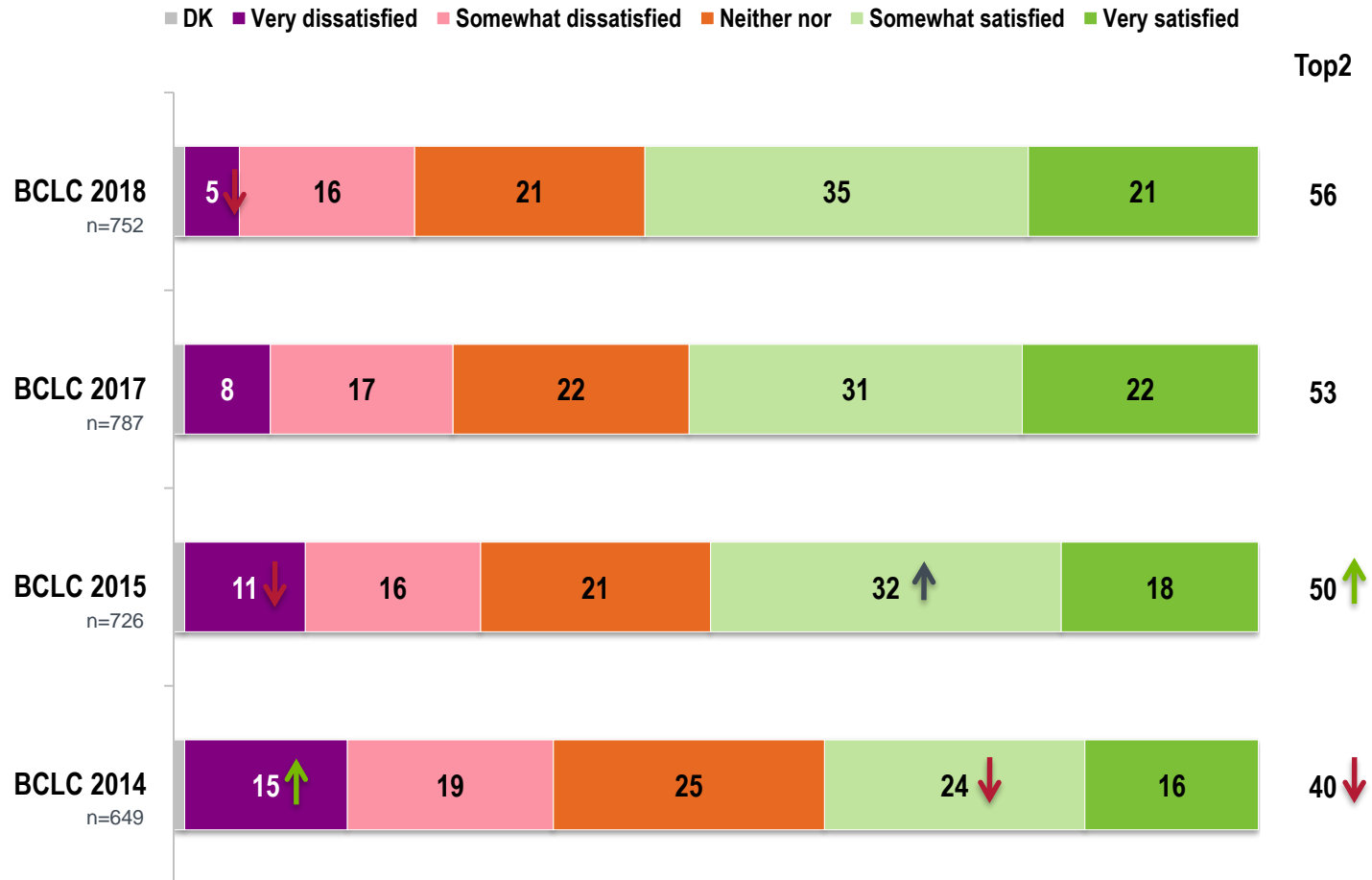
Opportunities for Training

Please rate your satisfaction with the aspects of your job ... The opportunities for training (%)



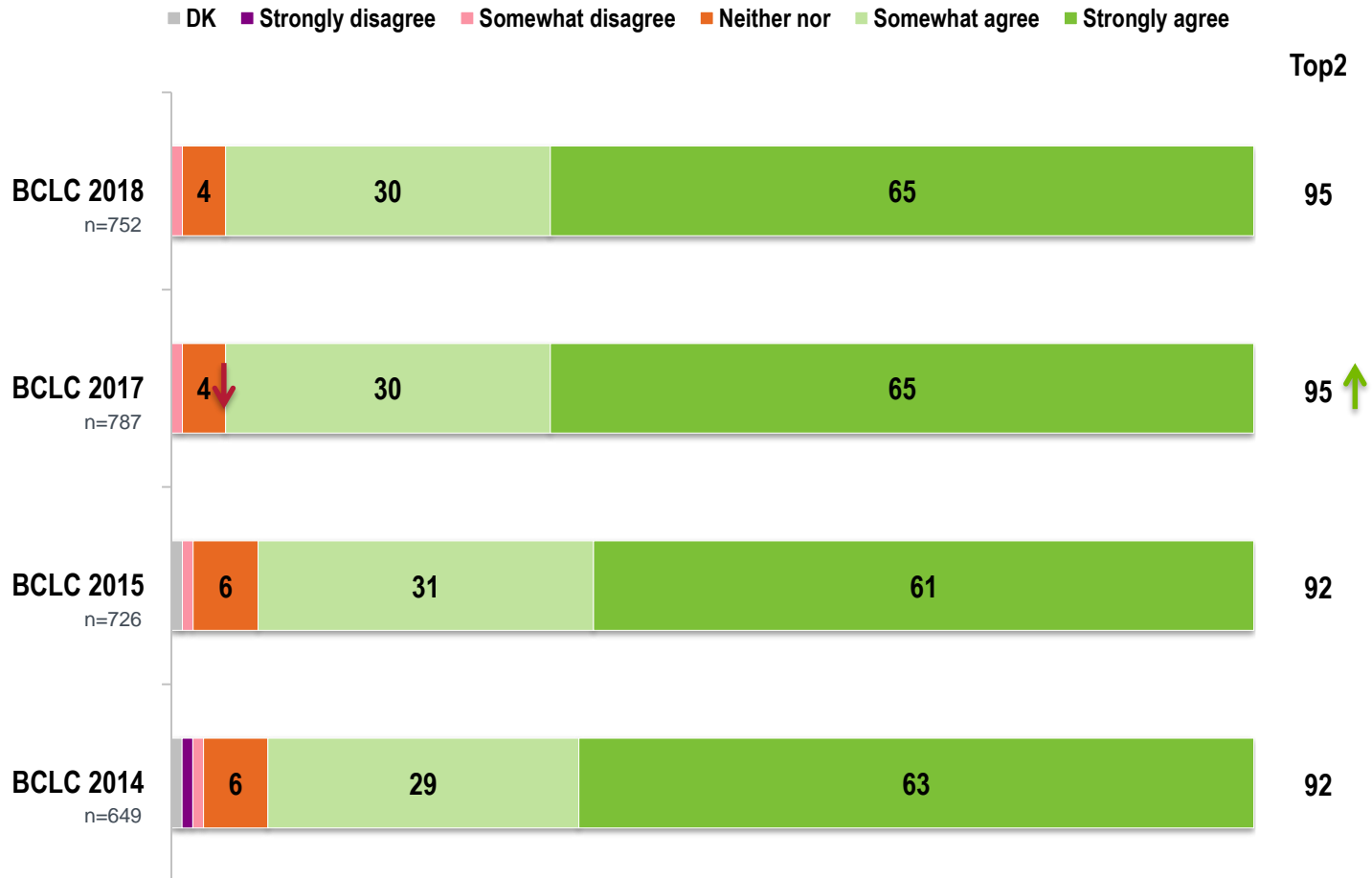
Opportunities for Career Progression

Please rate your satisfaction with the aspects of your job ... The opportunities for career progression (%)



Career Development

I take personal responsibility for my own career development (%)

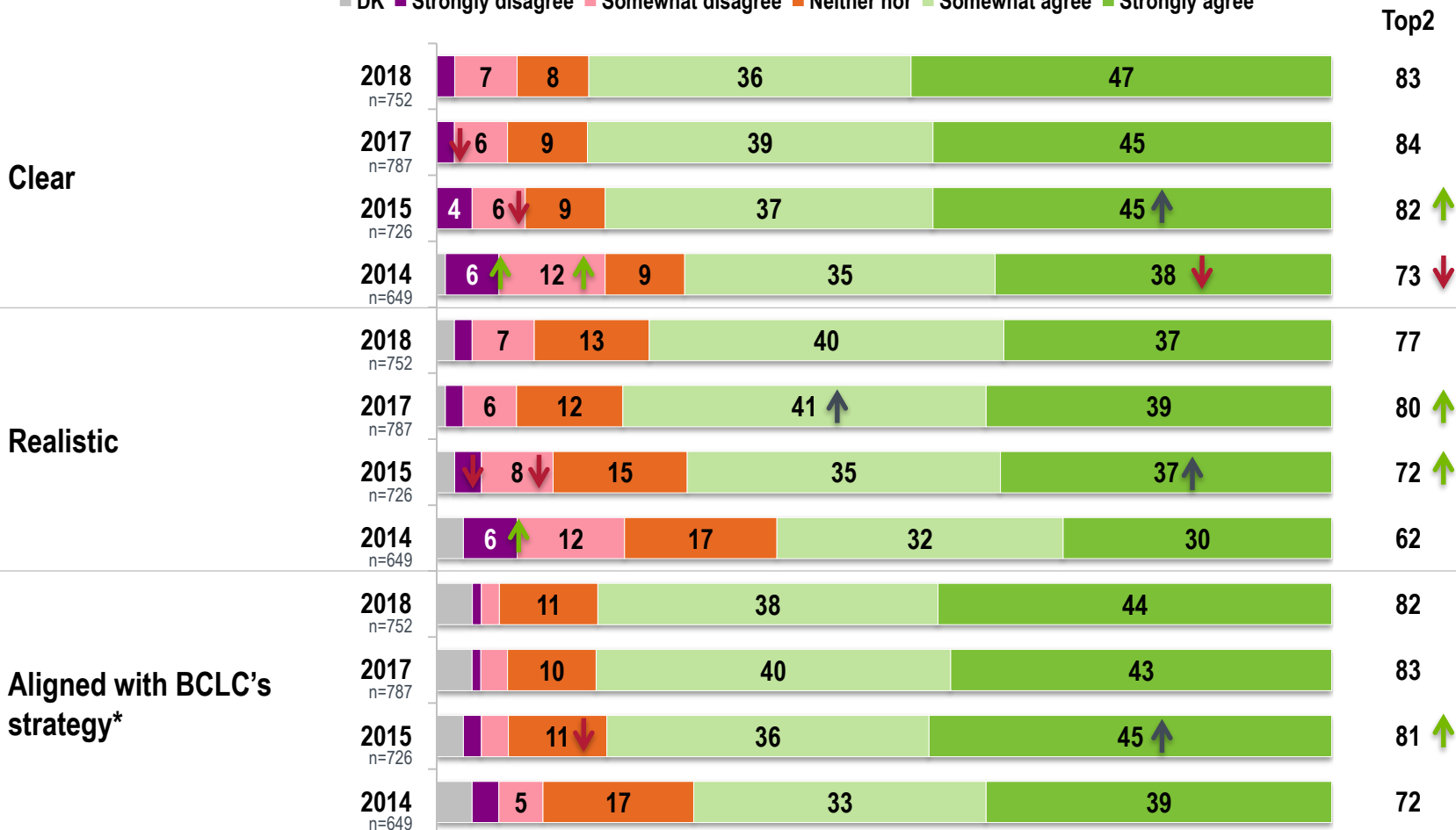


The Work Environment

Department Objectives – Clear, Realistic, Consistent

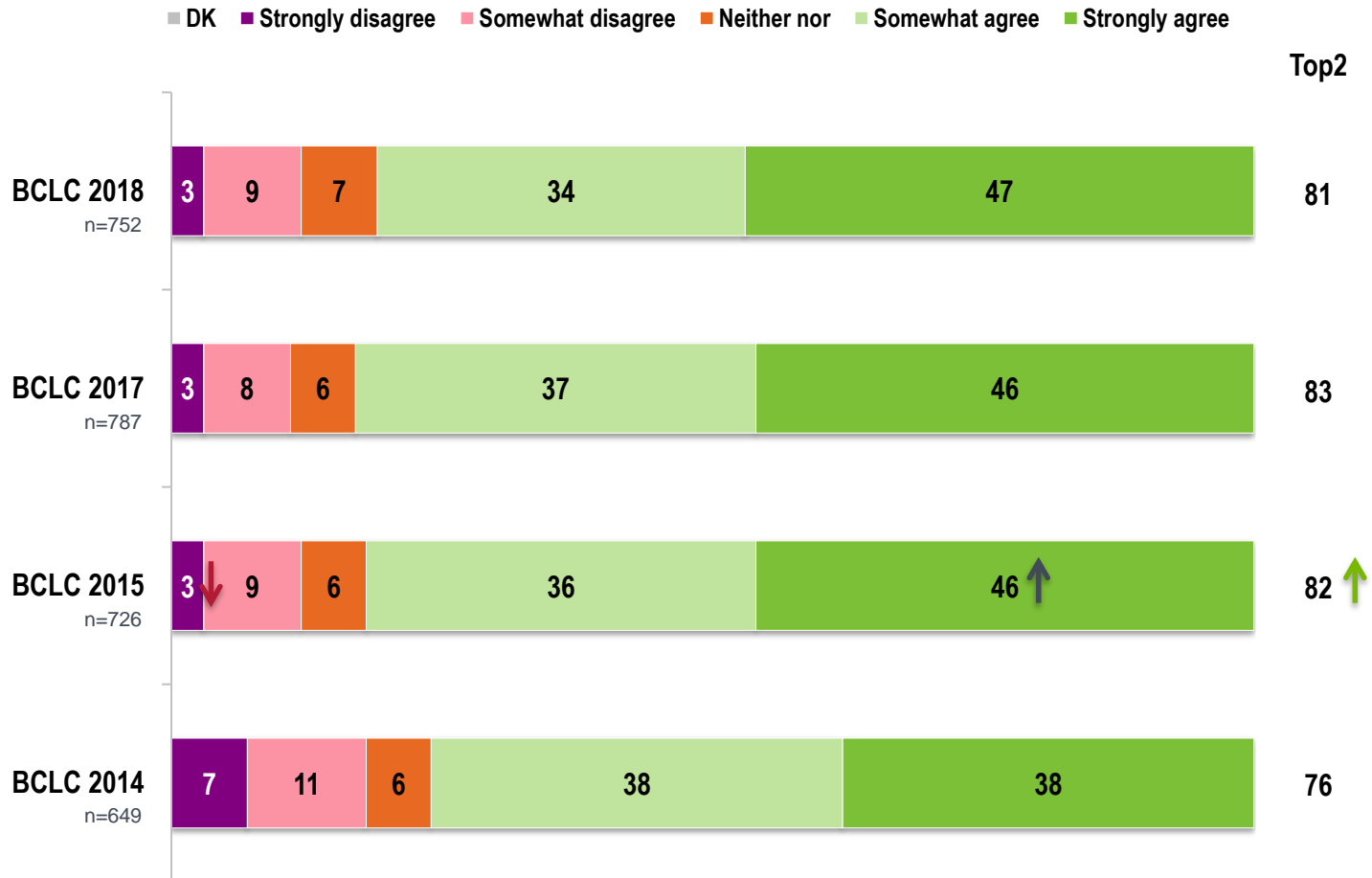
My department's objectives are ... (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

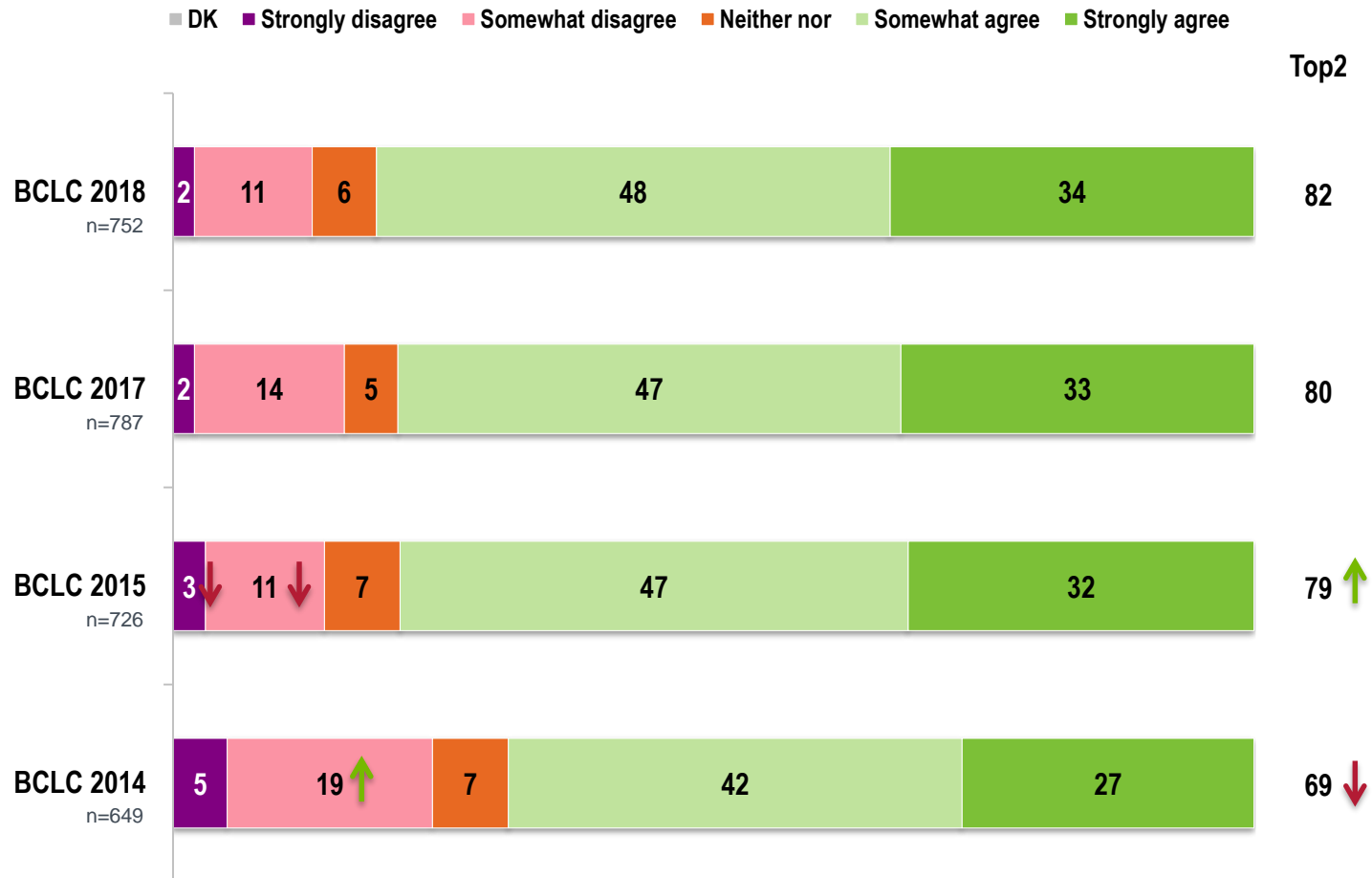


Good Communication

Communication is good within my team (%)



I have all the resources I require to do my job well (%)



Work Conditions

My work conditions allow me to perform effectively (%)



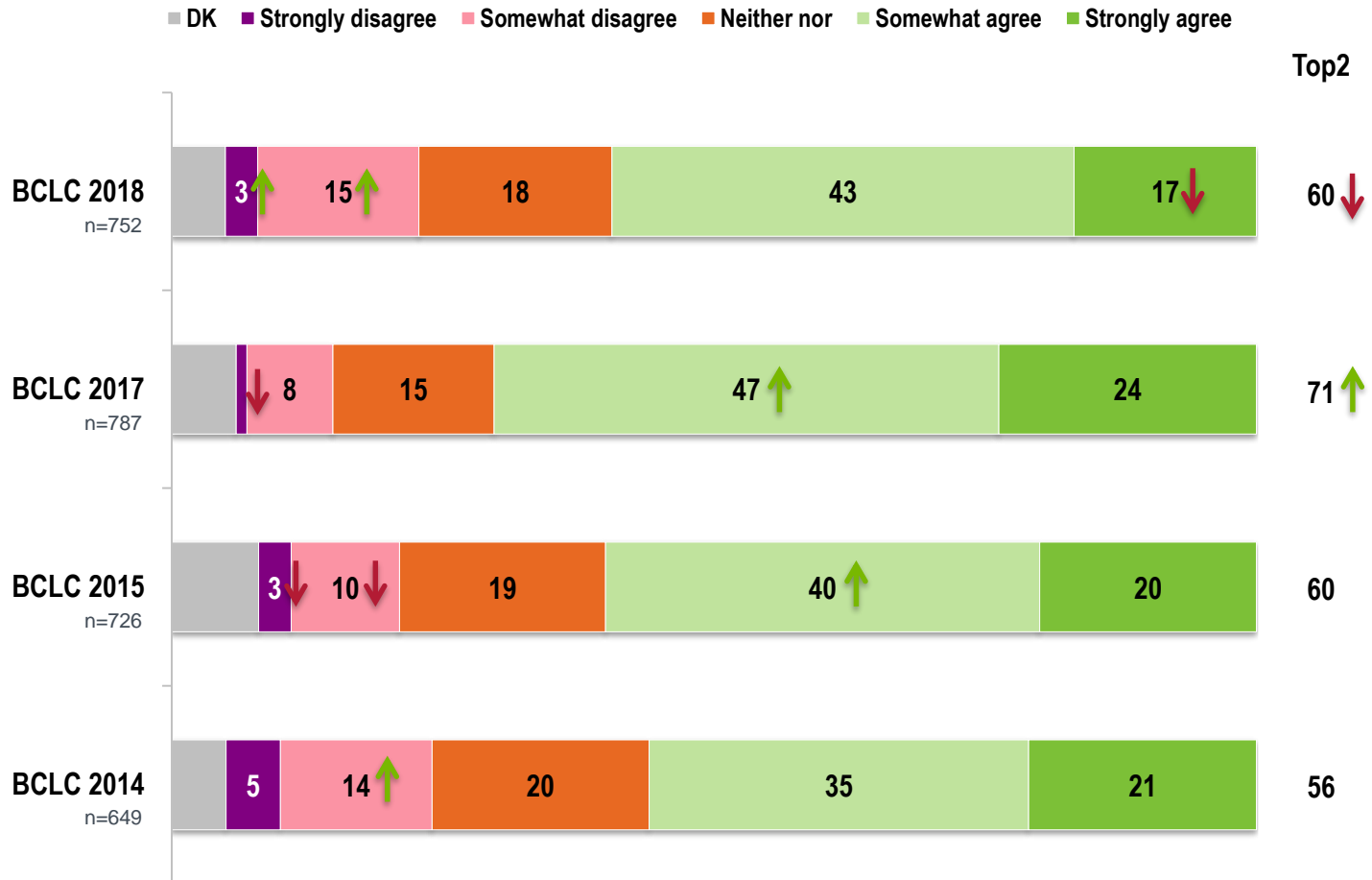
Working Atmosphere

Please rate your satisfaction with the working atmosphere within the team (%)



Projects are Usually Completed

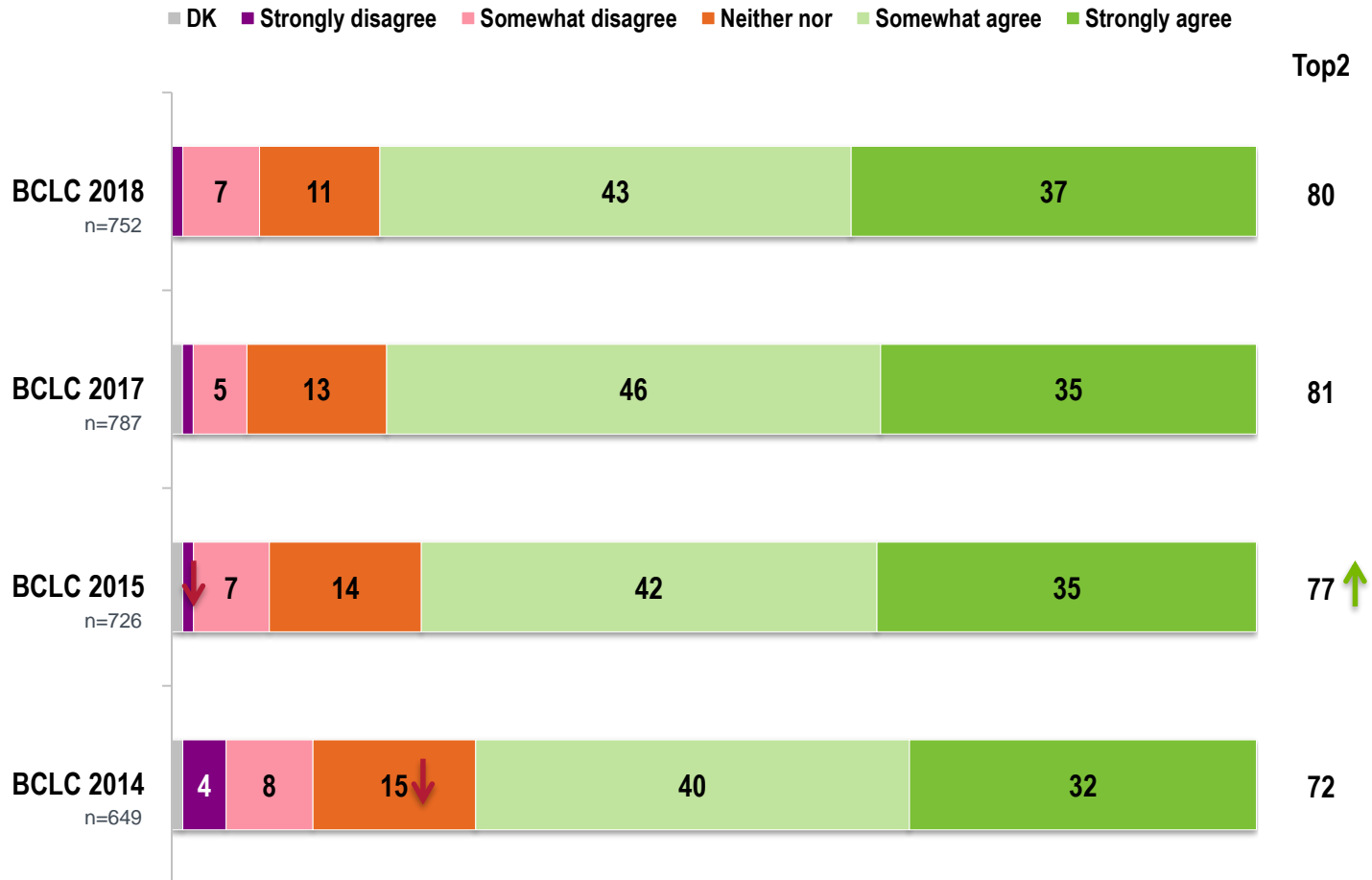
Projects and initiatives that are launched within BCLC usually get completed (%)



↑ Significant increase from last year
 ↓ Significant decrease from last year

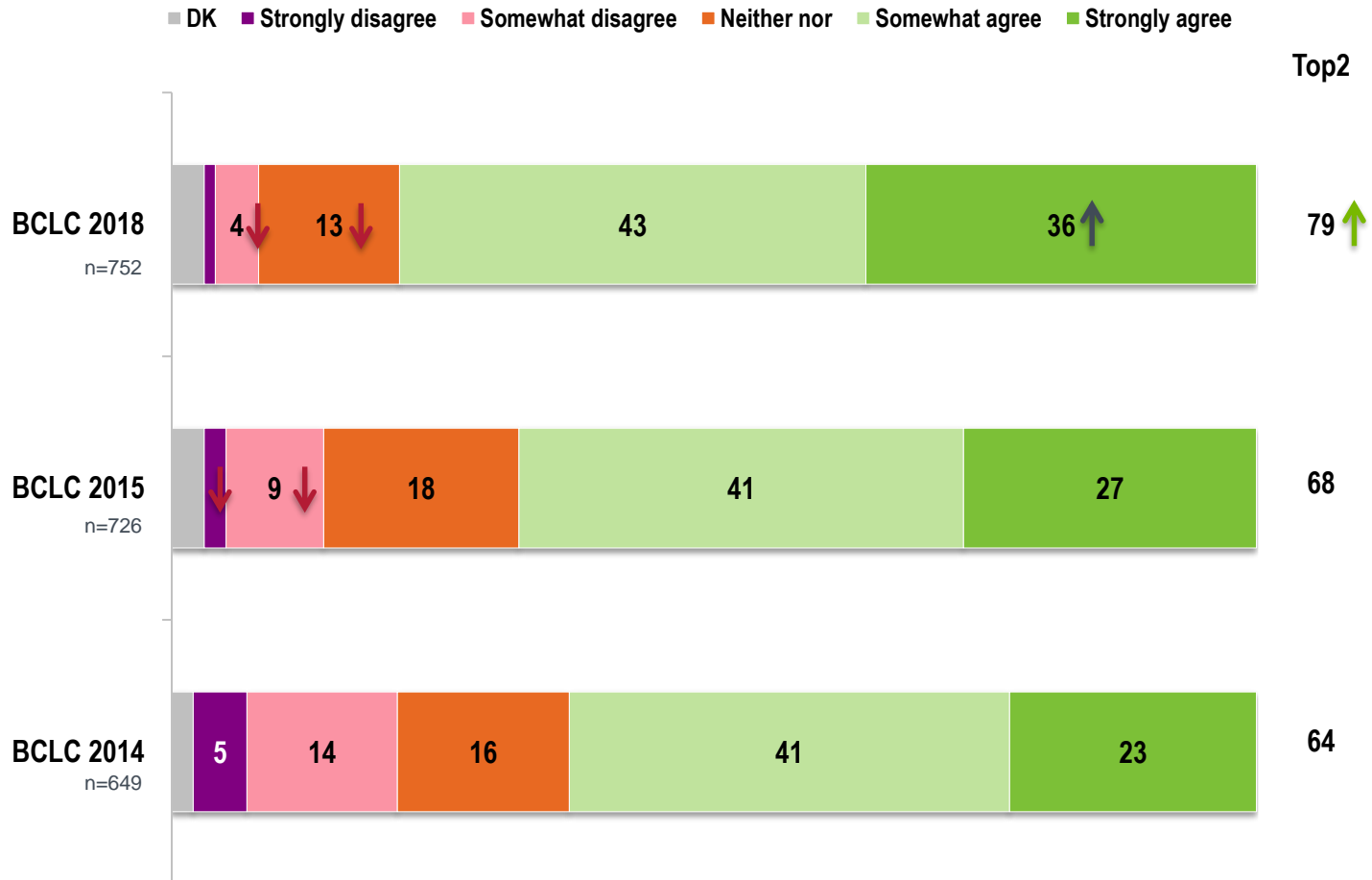
Communications Help Understand Objectives

Official communications are effective in helping me better understand our business objectives (%)



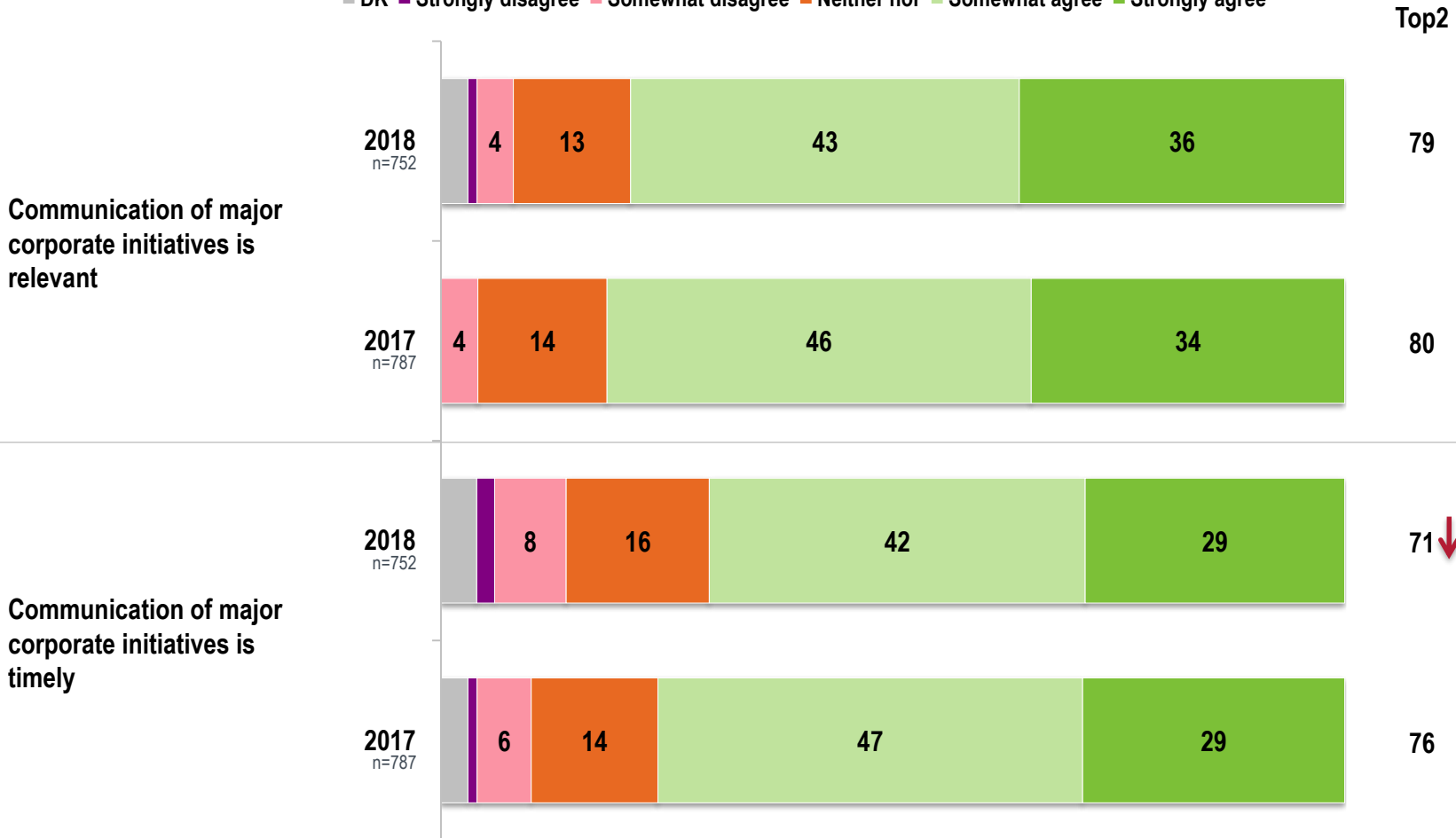
Communications are Timely and Relevant

Communication of major corporate initiatives is timely and relevant (%)



Communications are Timely and Relevant

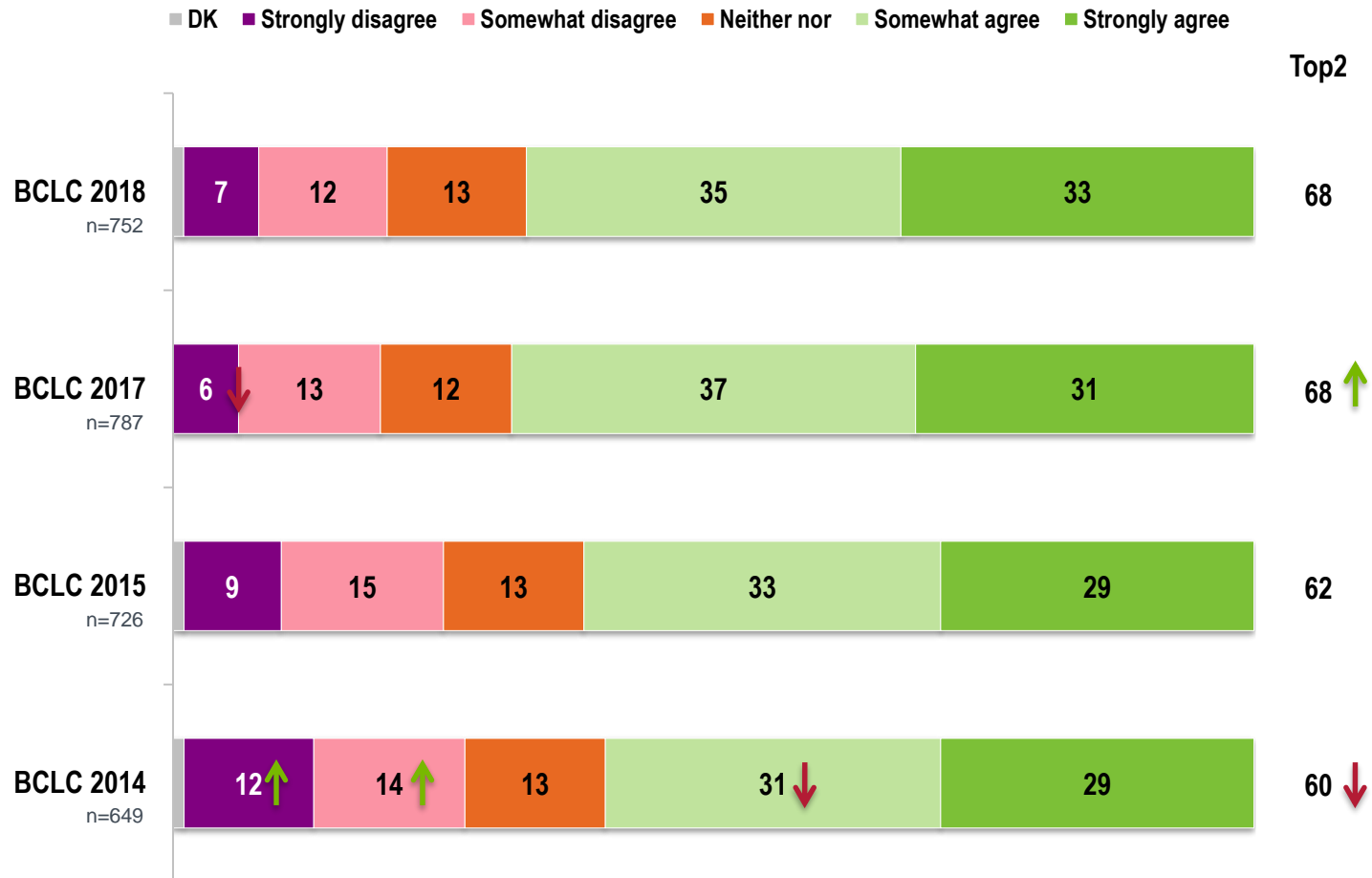
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



Recognition and Performance

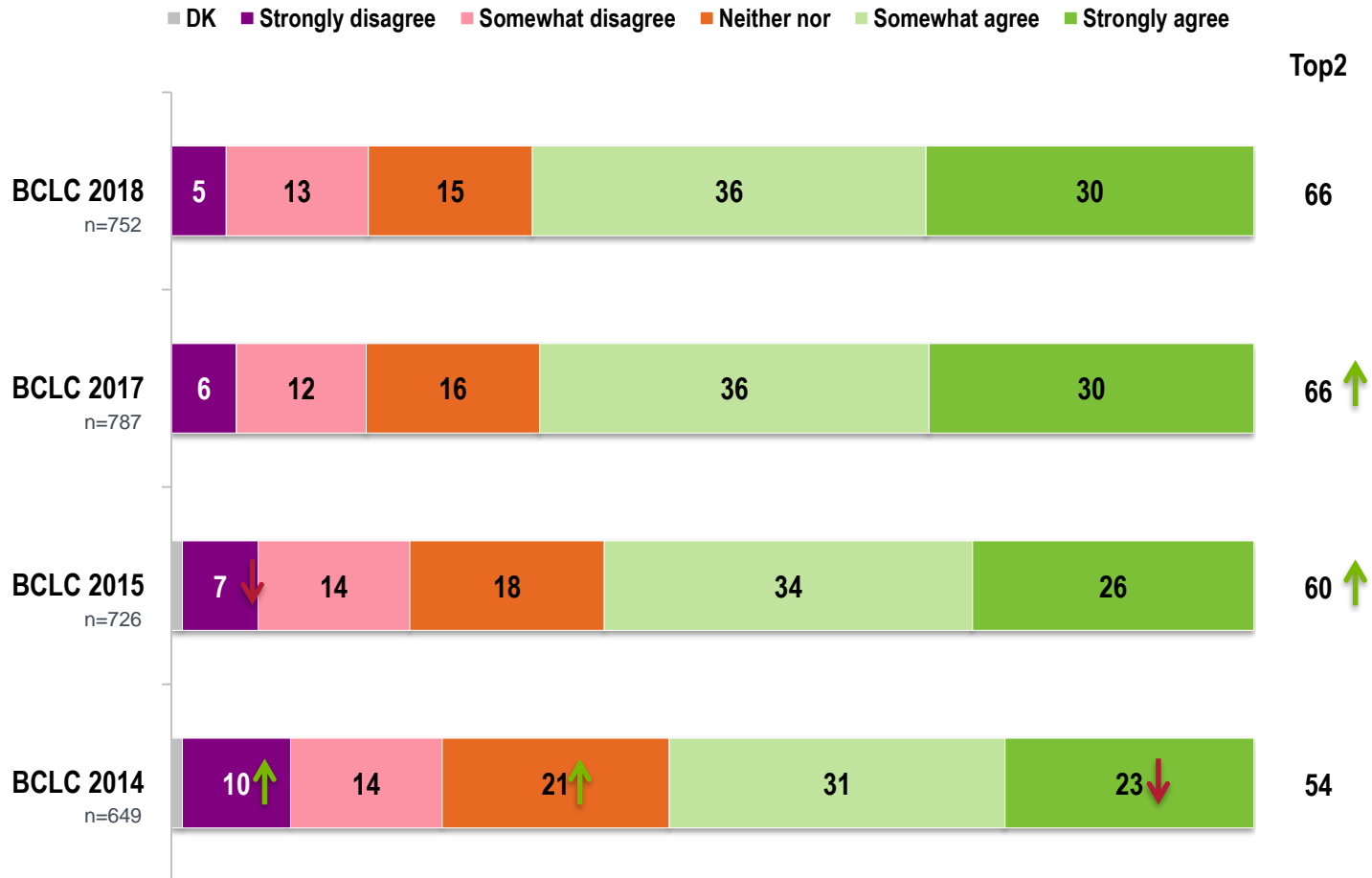
Recognized Based on Performance

I believe I am recognized based on my performance (%)



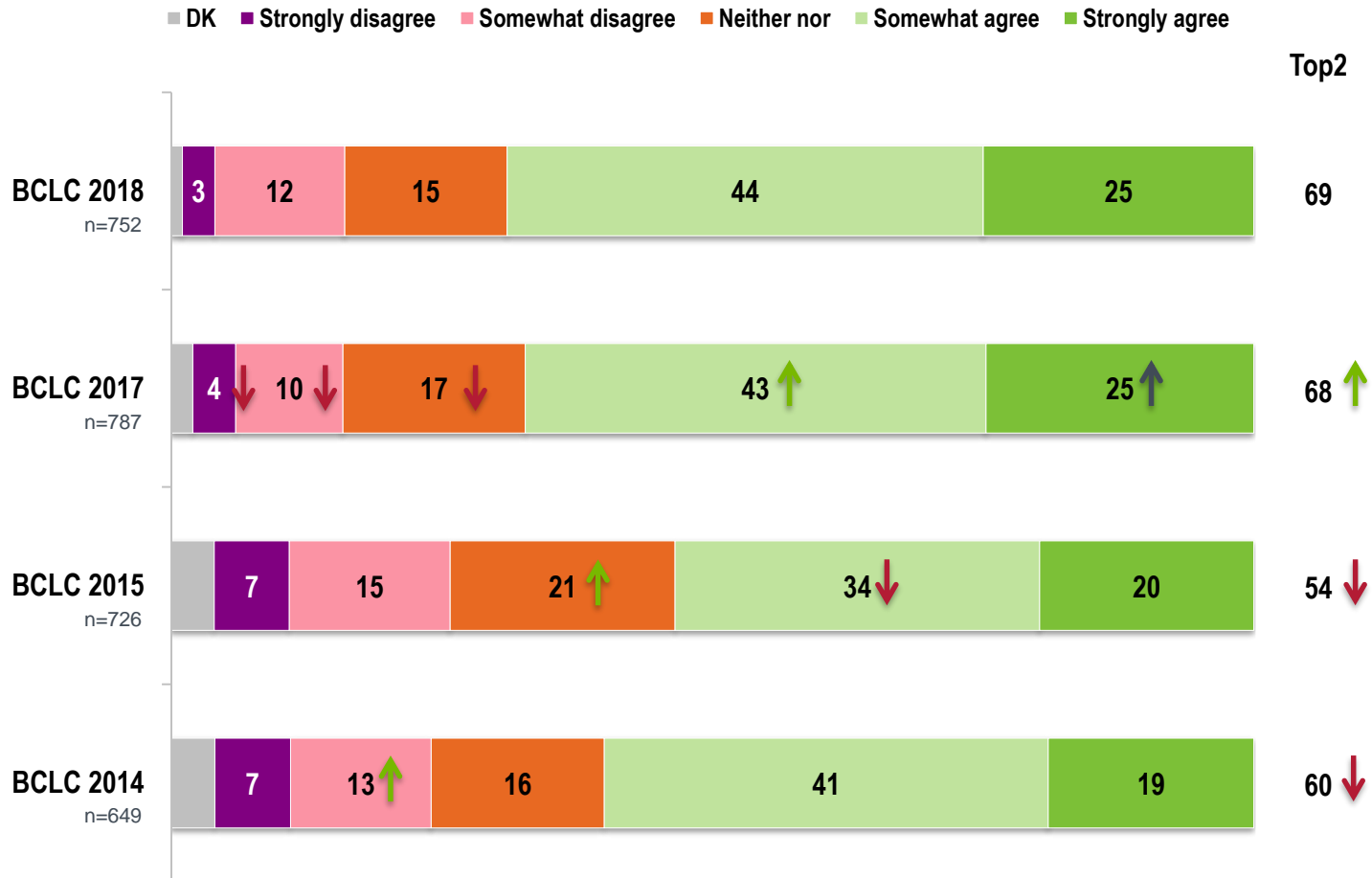
Perceiving Recognition

Recognition is given in a personal and meaningful way (%)



Reward Recognition

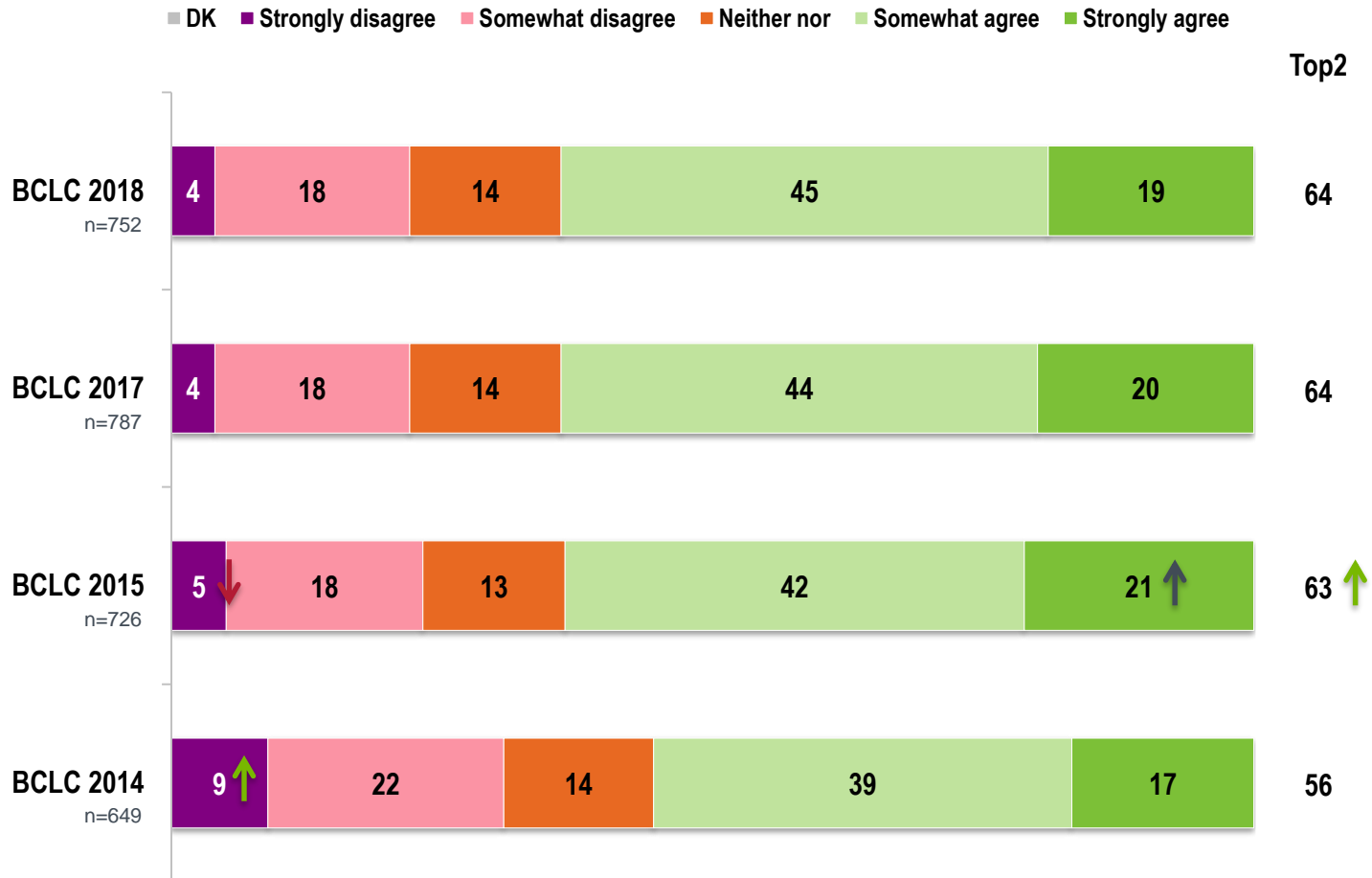
BCLC provides rewards to recognize various levels of achievement (%)



↑ Significant increase from last year ↓ Significant decrease from last year

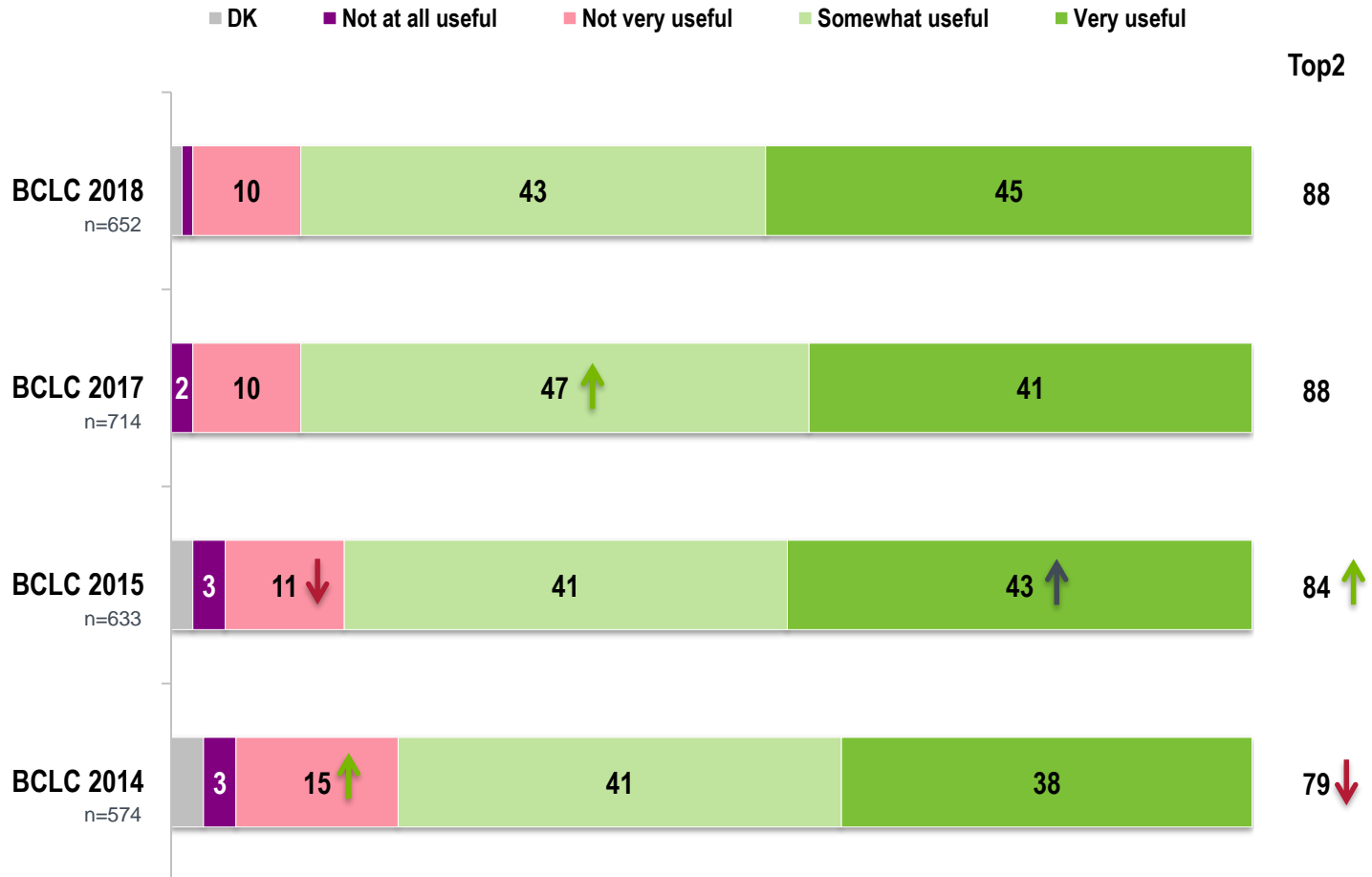
Perform Effectively

The work processes at BCLC allow me to perform effectively (%)



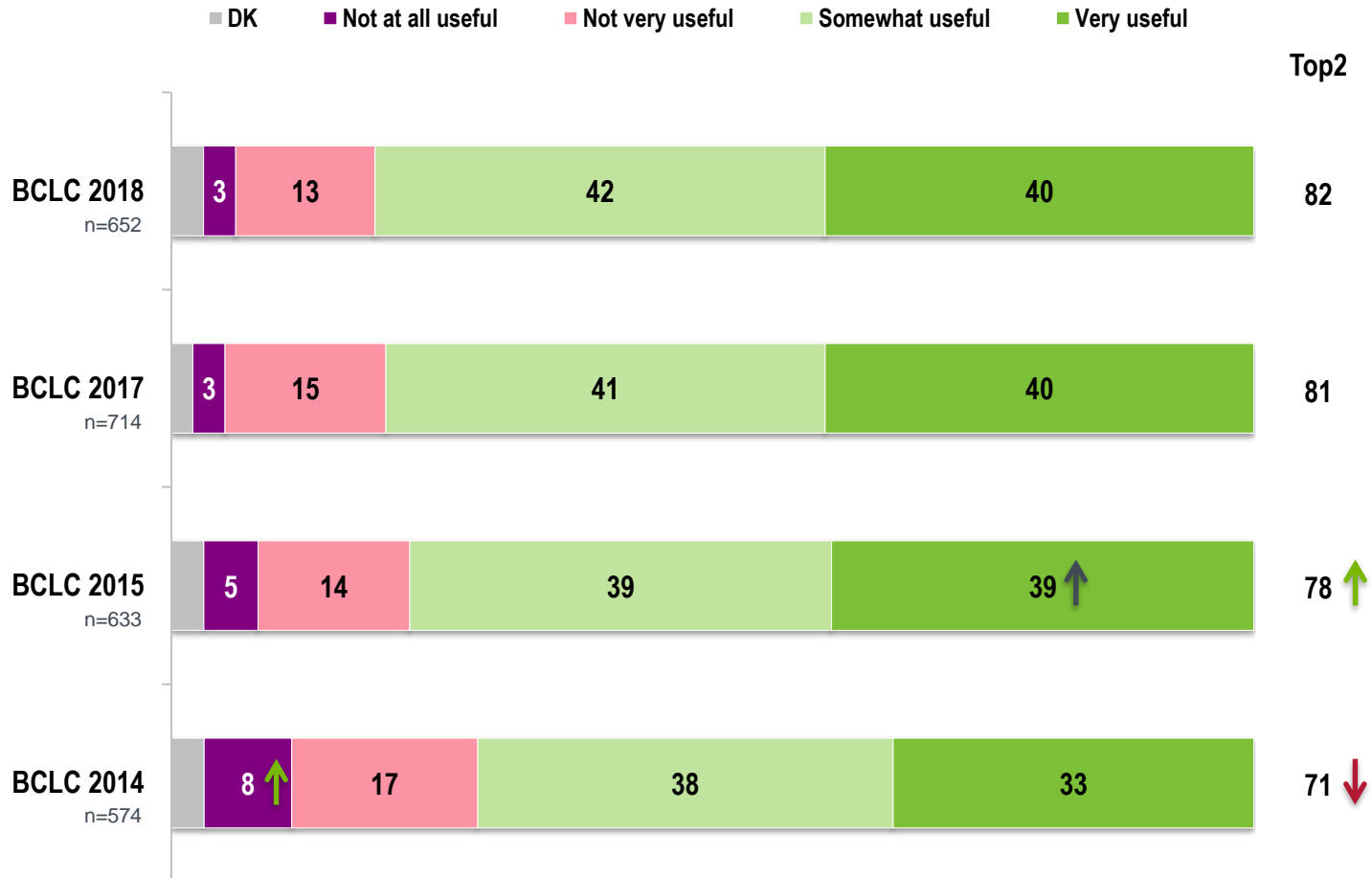
Improving Current Performance

How useful was the performance discussion on identifying ways of improving your current performance? (%)



Identifying Development Opportunities

How useful was the performance discussion on identifying your future development opportunities? (%)



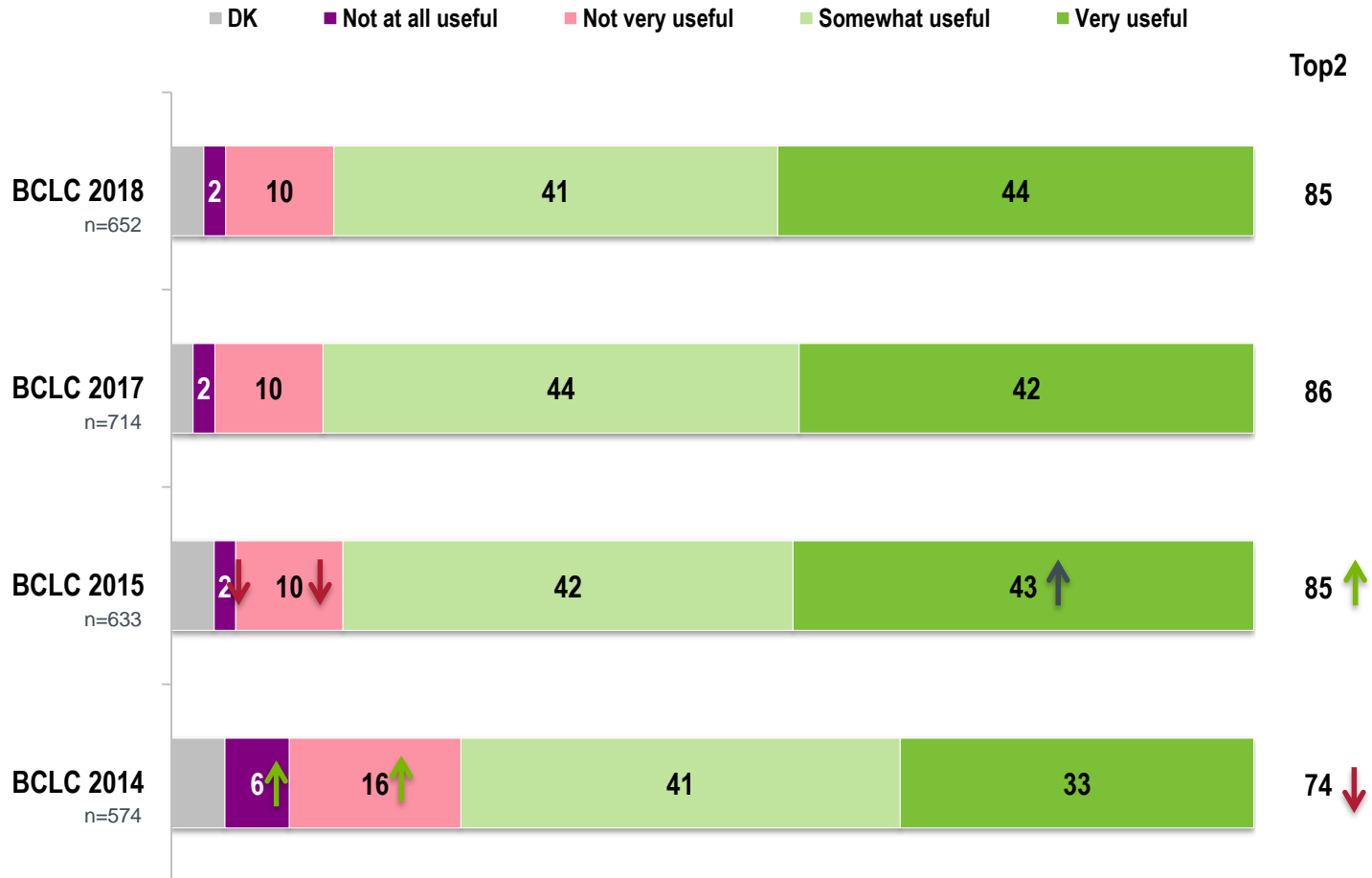
Significant increase from last year



Significant decrease from last year

Setting Future Performance Expectations

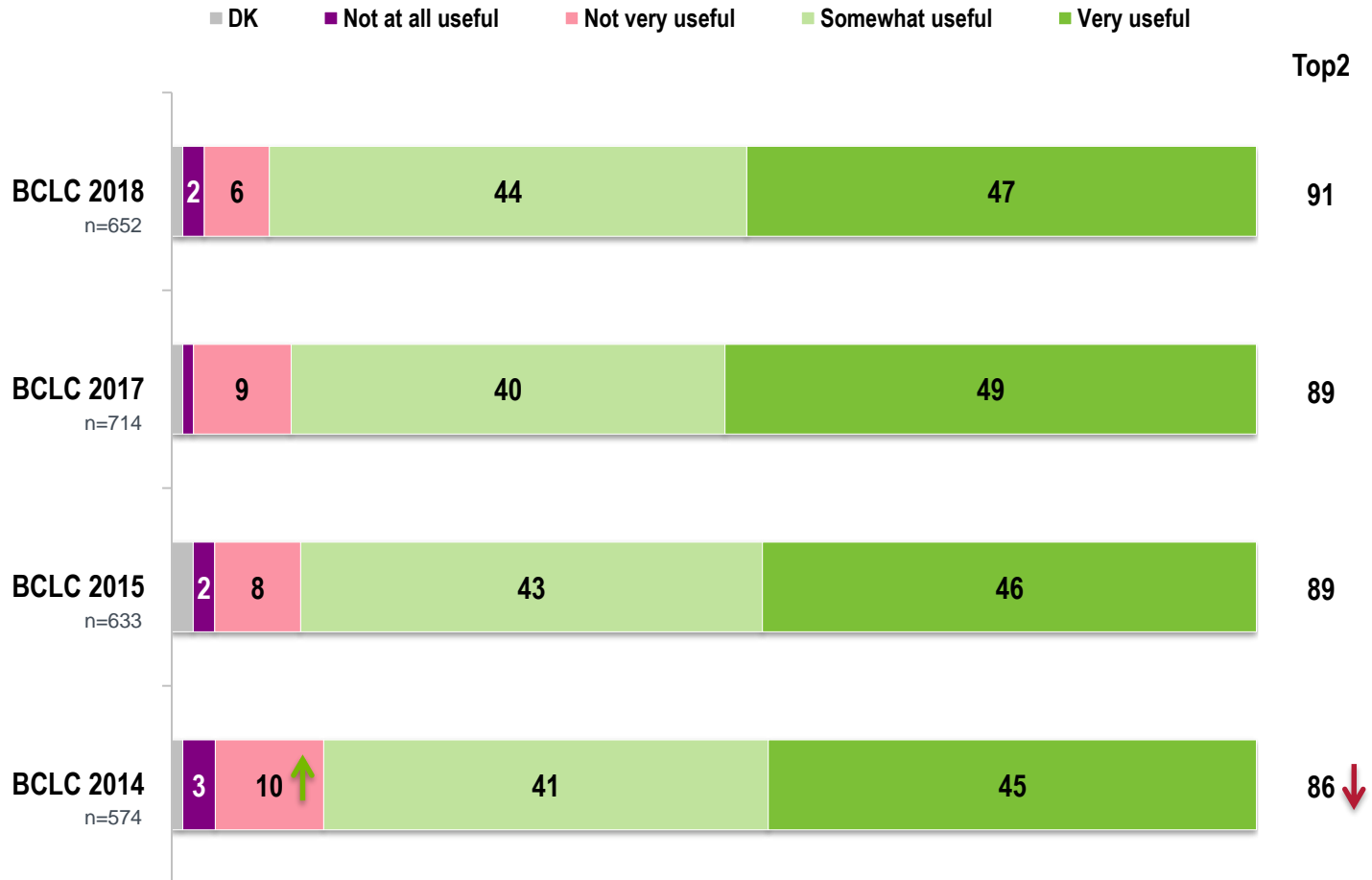
How useful was the performance discussion on setting performance expectations for the next year? (%)



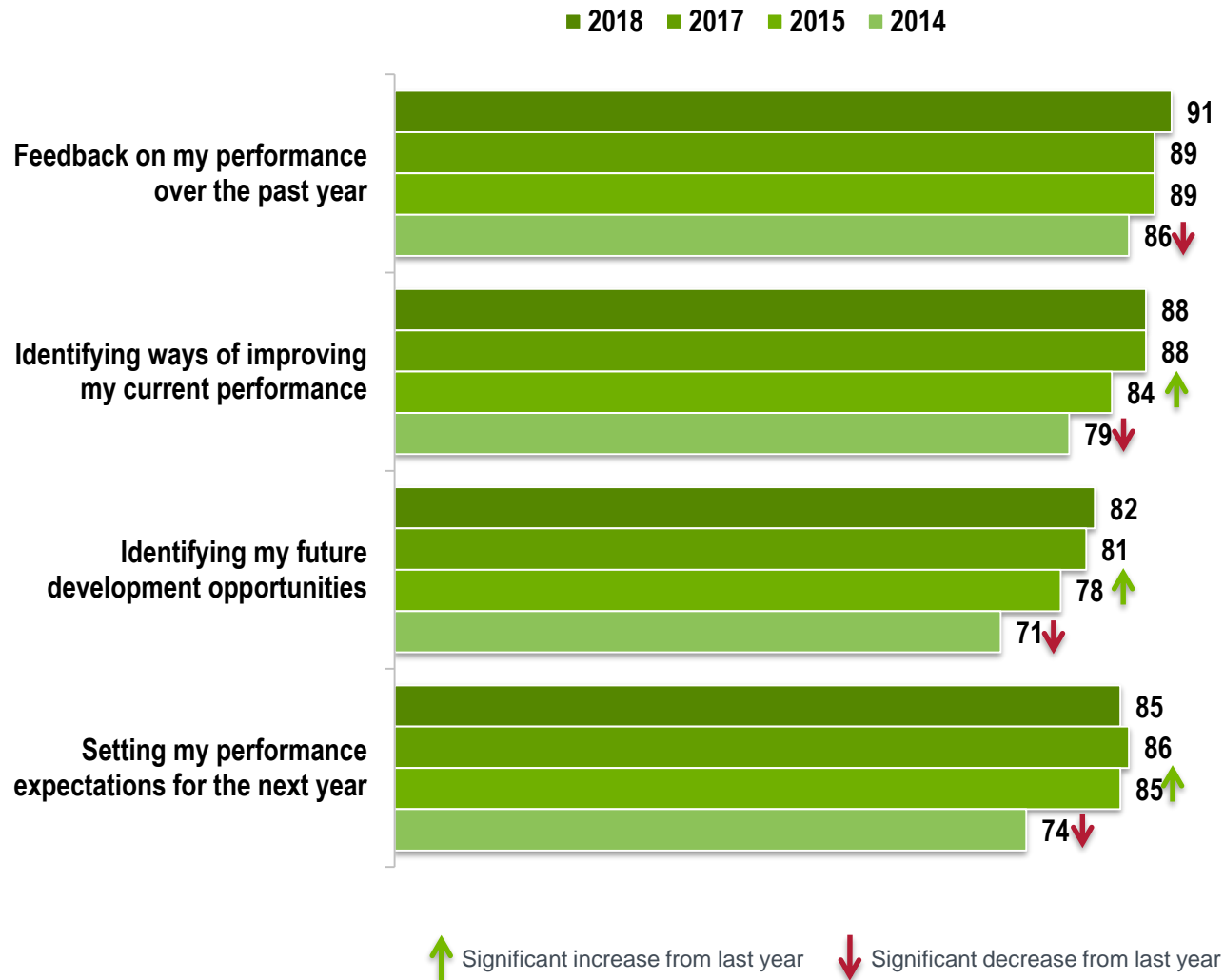
↑ Significant increase from last year
 ↓ Significant decrease from last year

Feedback on Performance

How useful was the performance discussion on your performance over the past year? (%)



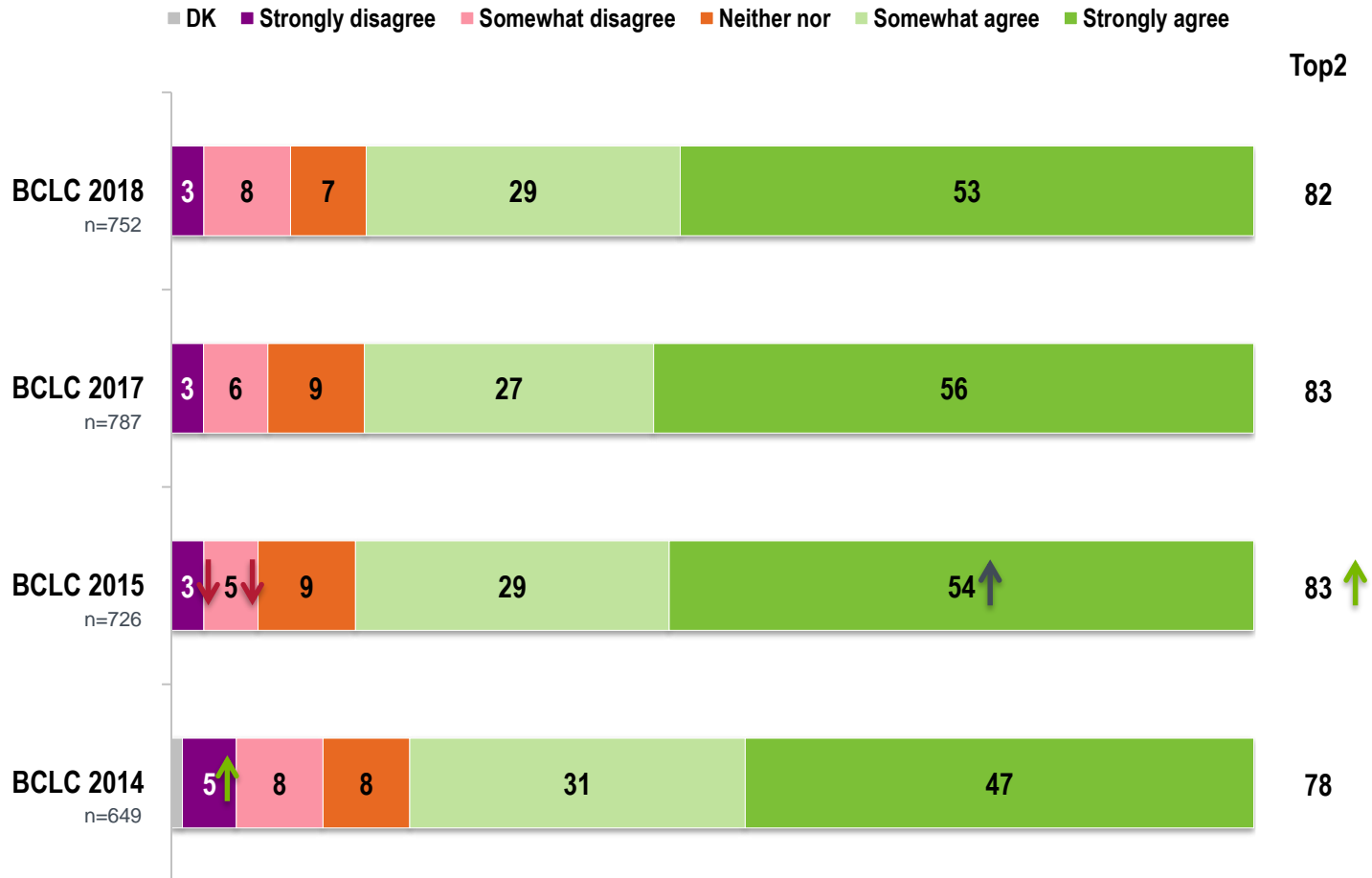
Results If Employee Had Performance Review



My Manager / Leader

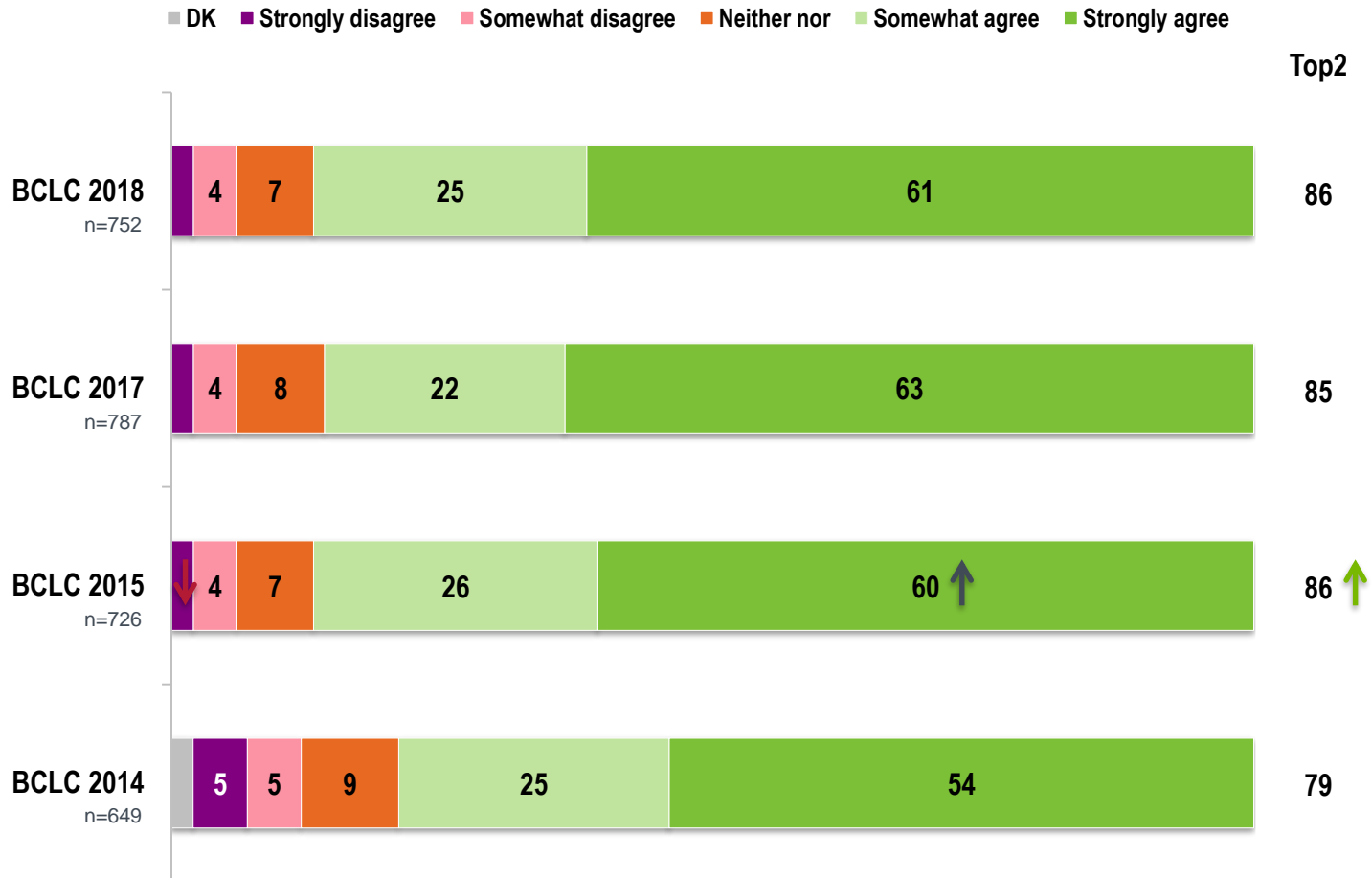
Confidence in Leader

I have confidence in the decisions made by the person I report to (%)



Leader Encouraging

The person I report to encourages and supports innovative thinking (%)



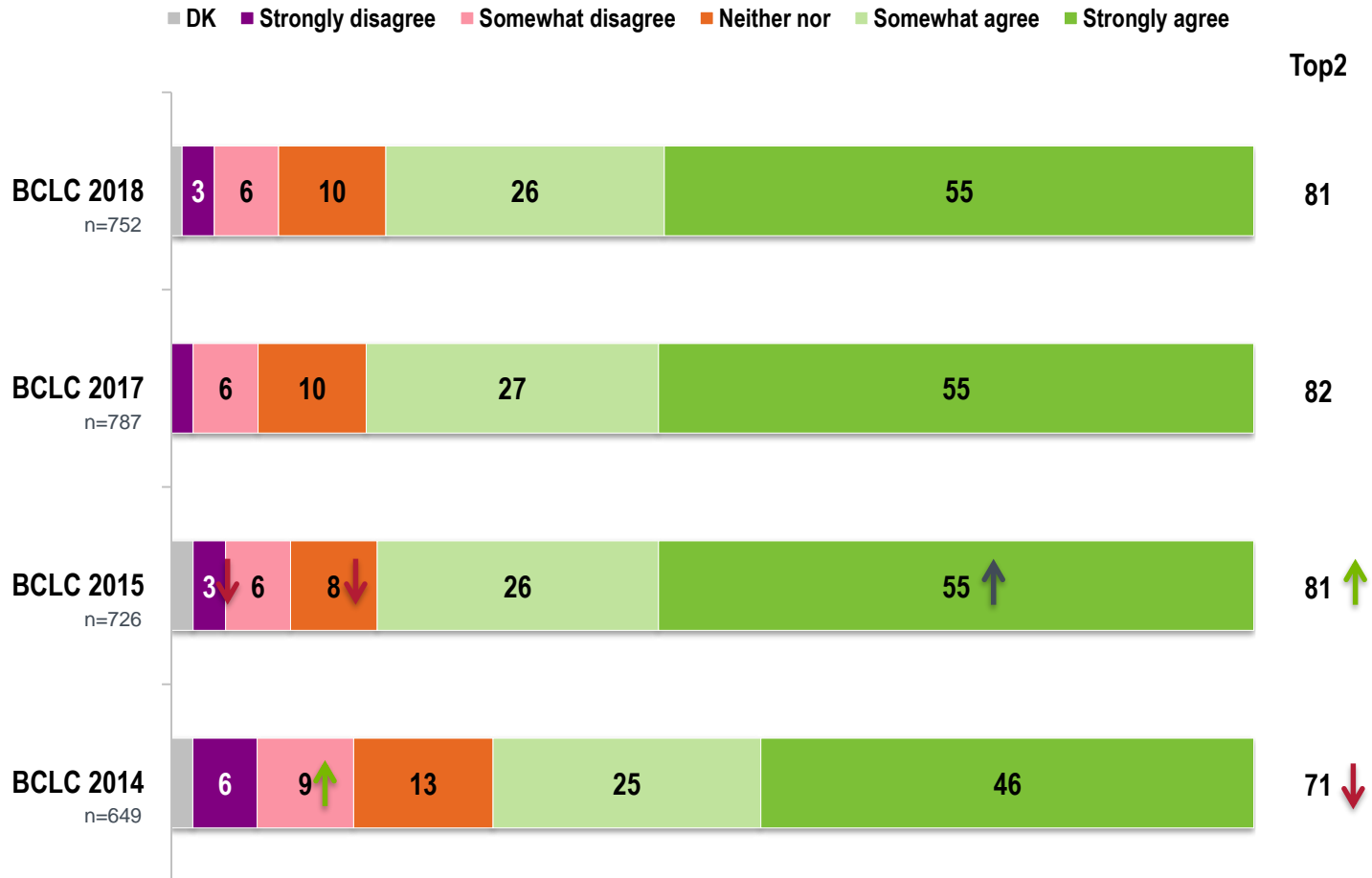
Leader Promotes Open Communication

The person I report to promotes open and honest communication (%)



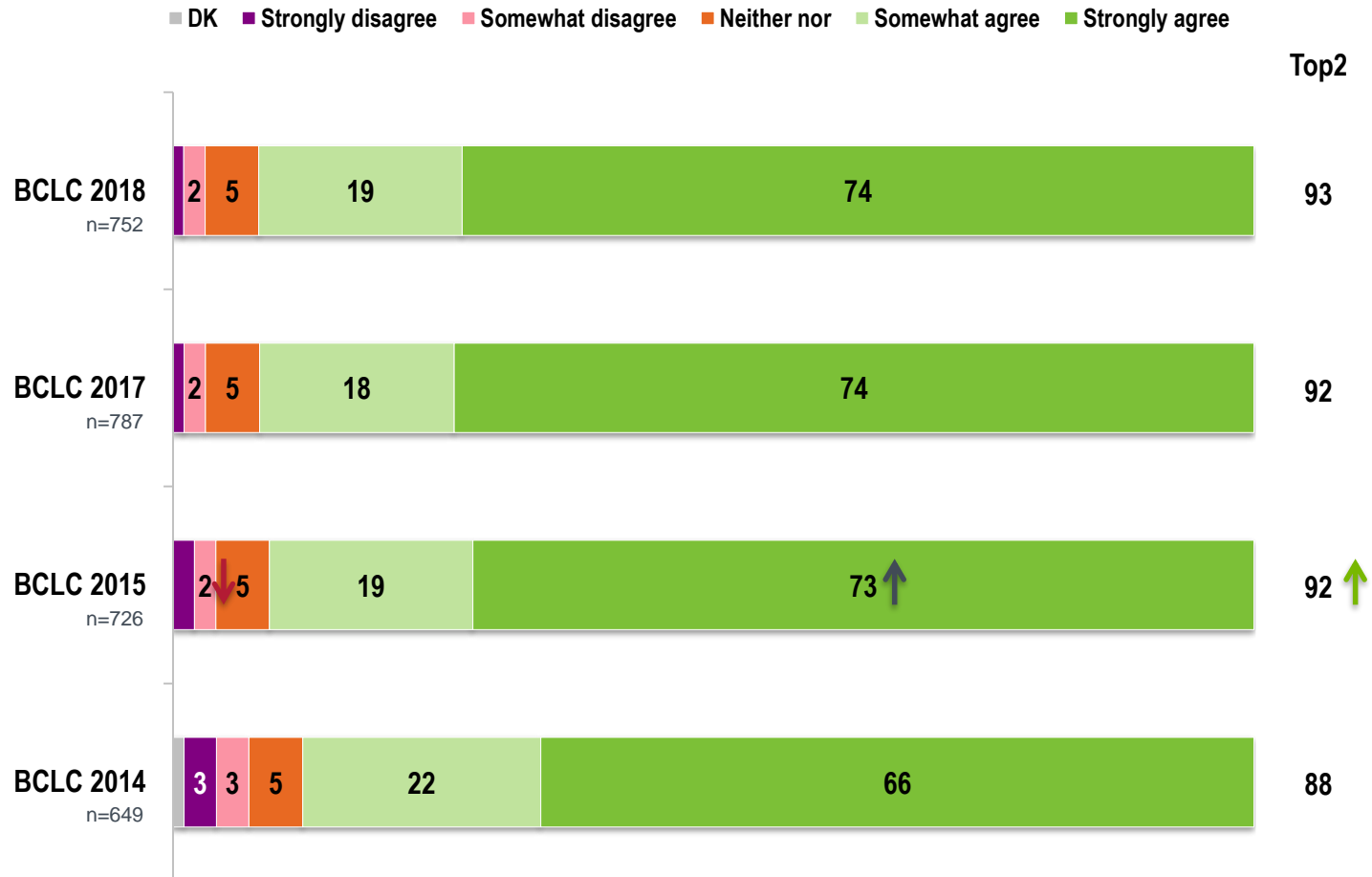
Leader Committed to Development

The person I report to is committed to my development (%)



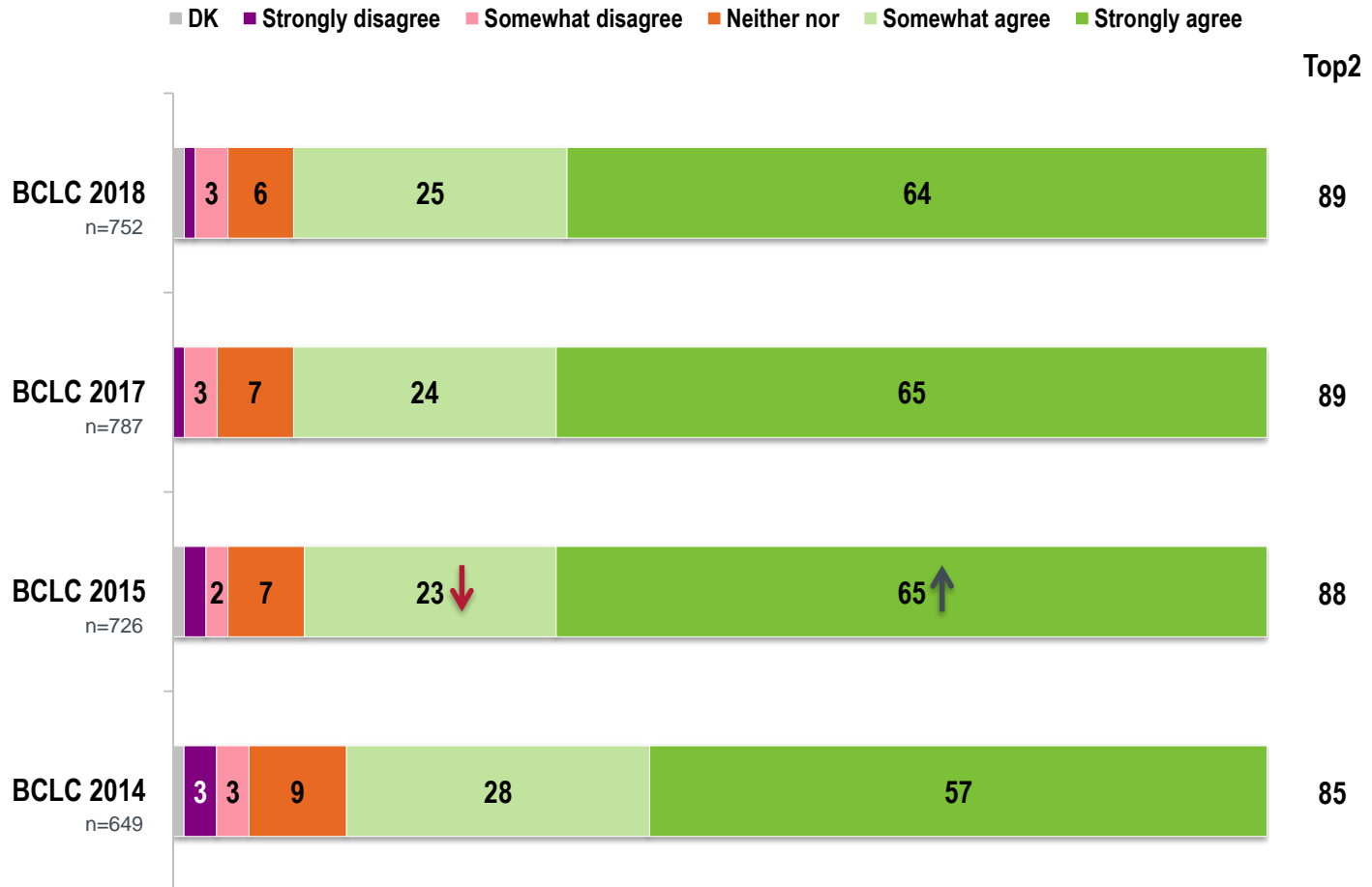
Leader Respectful

The person I report to treats me with respect (%)



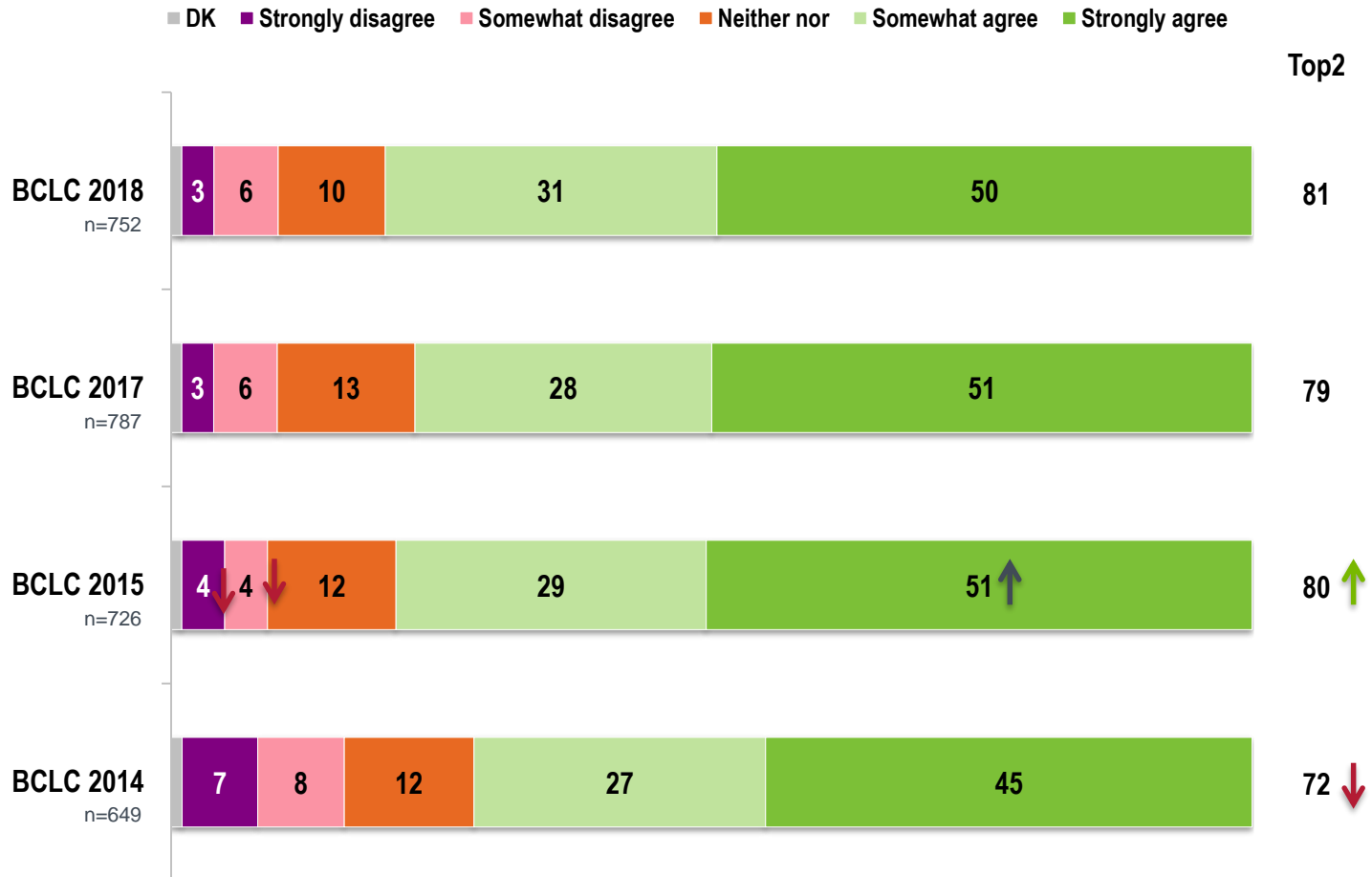
Leader Values Contributions

The person I report to values my contributions (%)



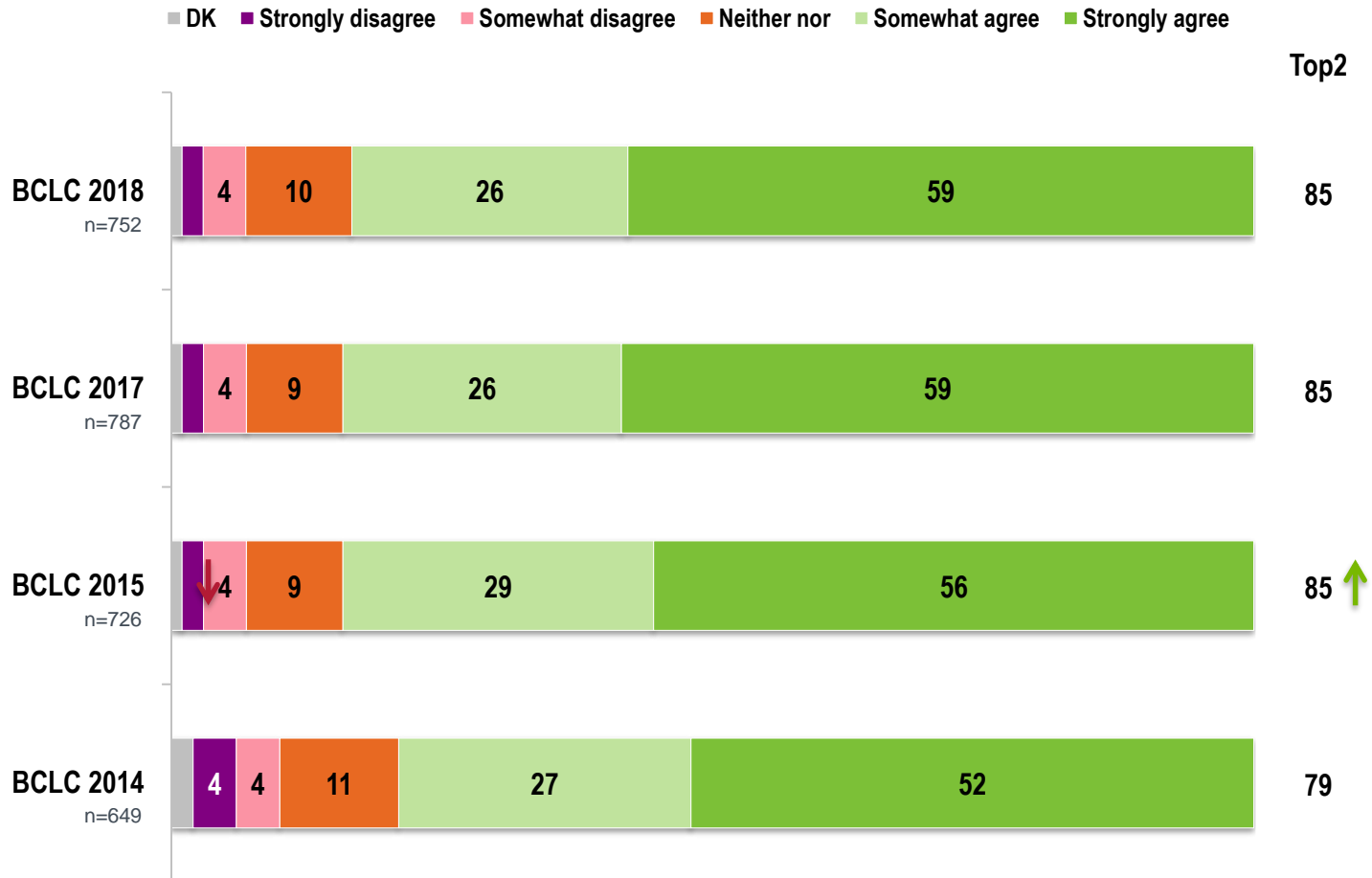
Leader Develops Teamwork

The person I report to develops teamwork within our own team (%)



Leader Encourages Collaboration

The person I report to encourages collaboration with other teams (%)



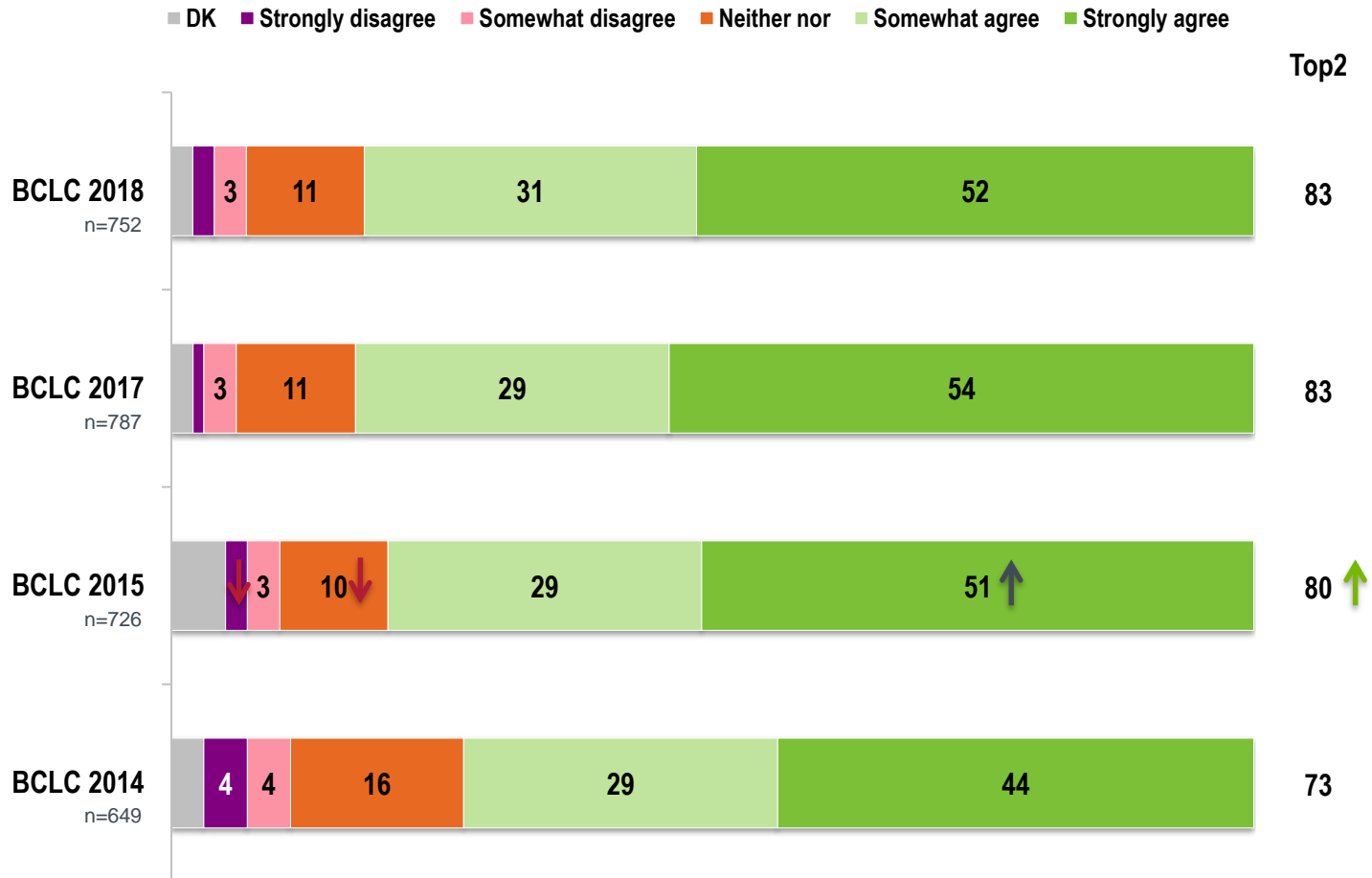
Significant increase from last year



Significant decrease from last year

Leader Betters Customer Experience

The person I report to continually seeks ways to improve the customers' experience (%)



Compensation and Benefits

Salary

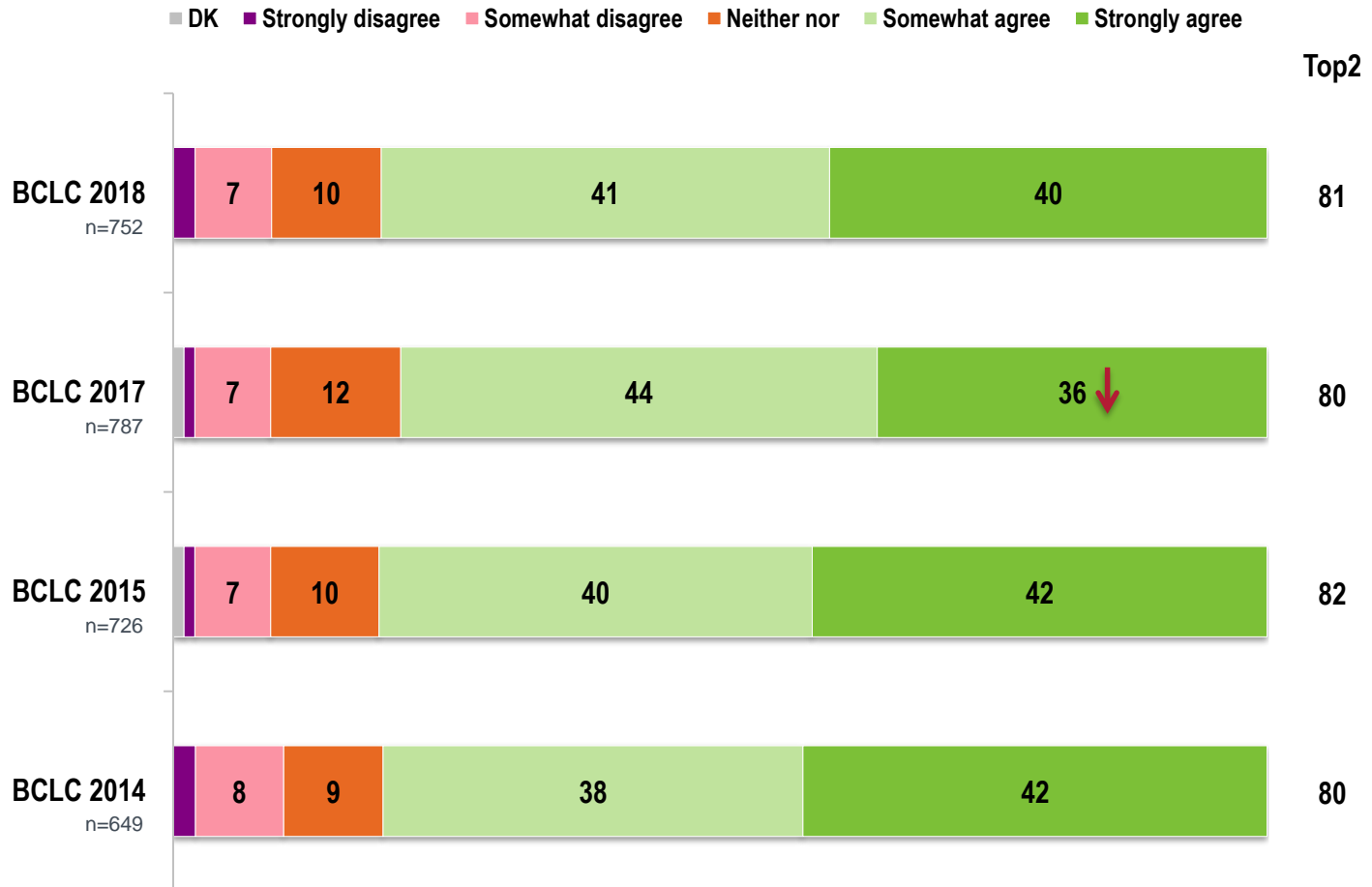
Please rate your satisfaction with the salary (%)



↑ Significant increase from last year ↓ Significant decrease from last year

Well Informed About Benefits Package

I am well informed about my benefits package (%)



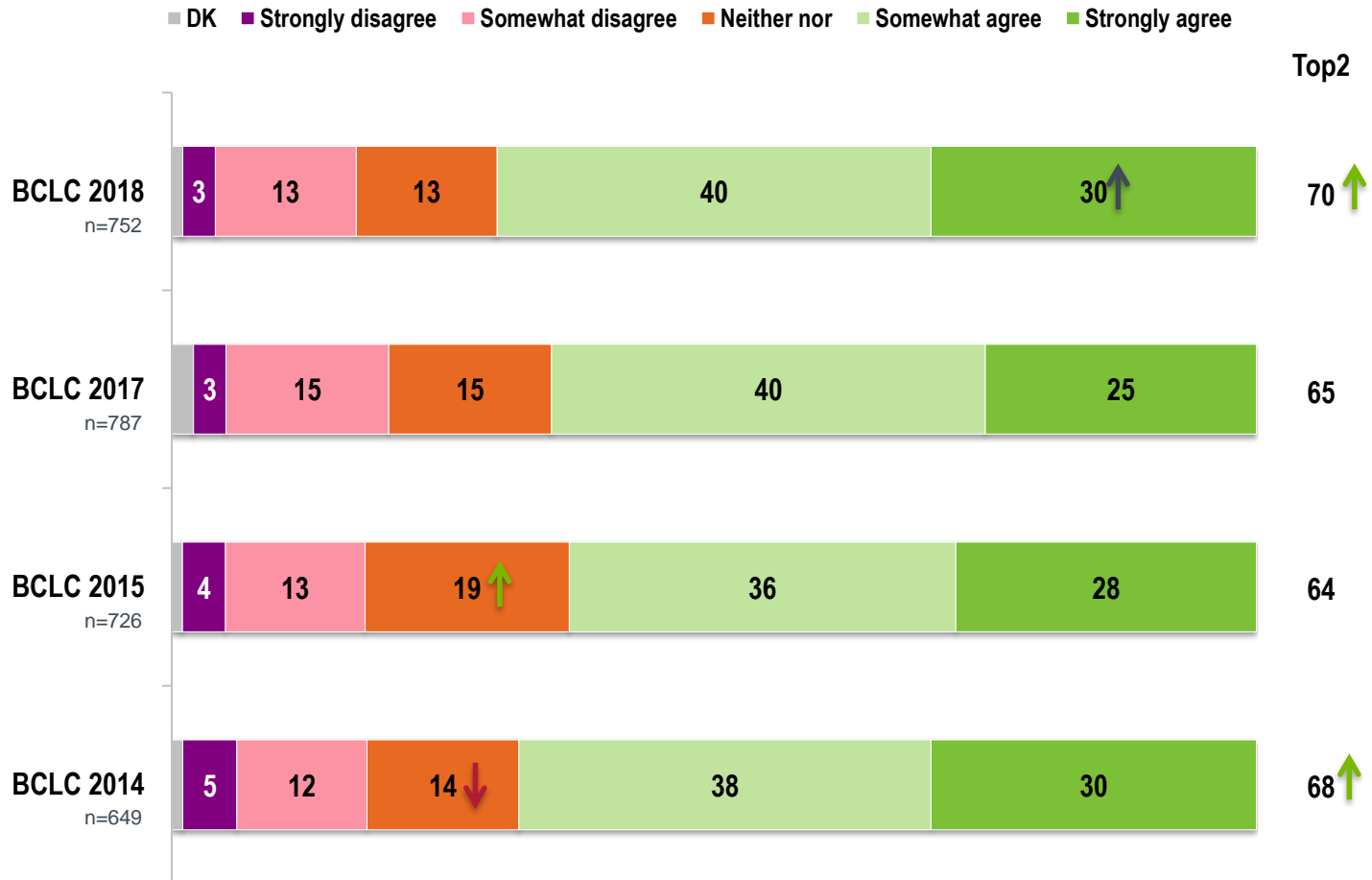
Benefits Meet Current Needs

My benefits package meets my current needs (%)



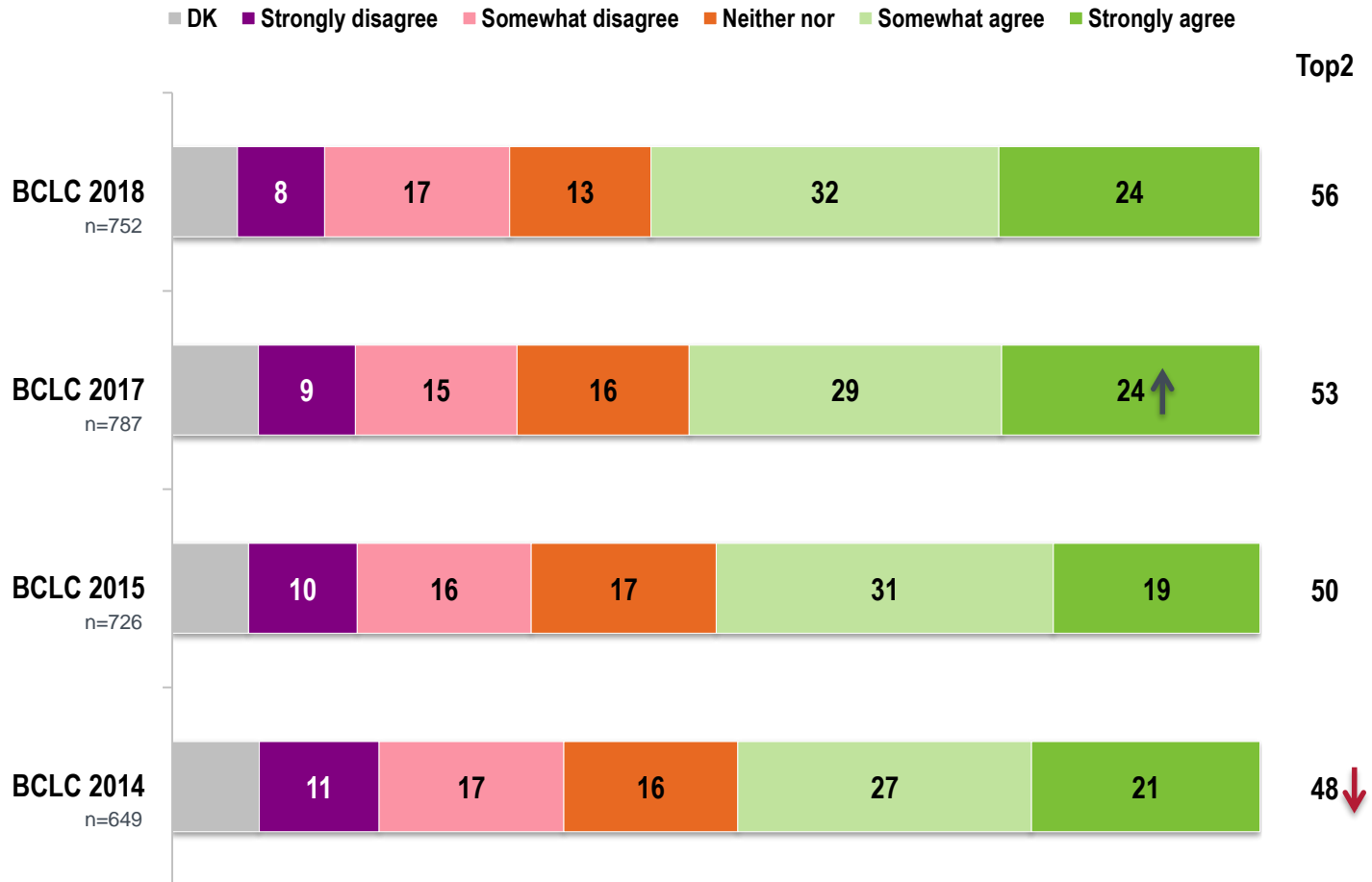
Pension/Retirement Savings Program

I am well informed about my pension/retirement savings program (%)



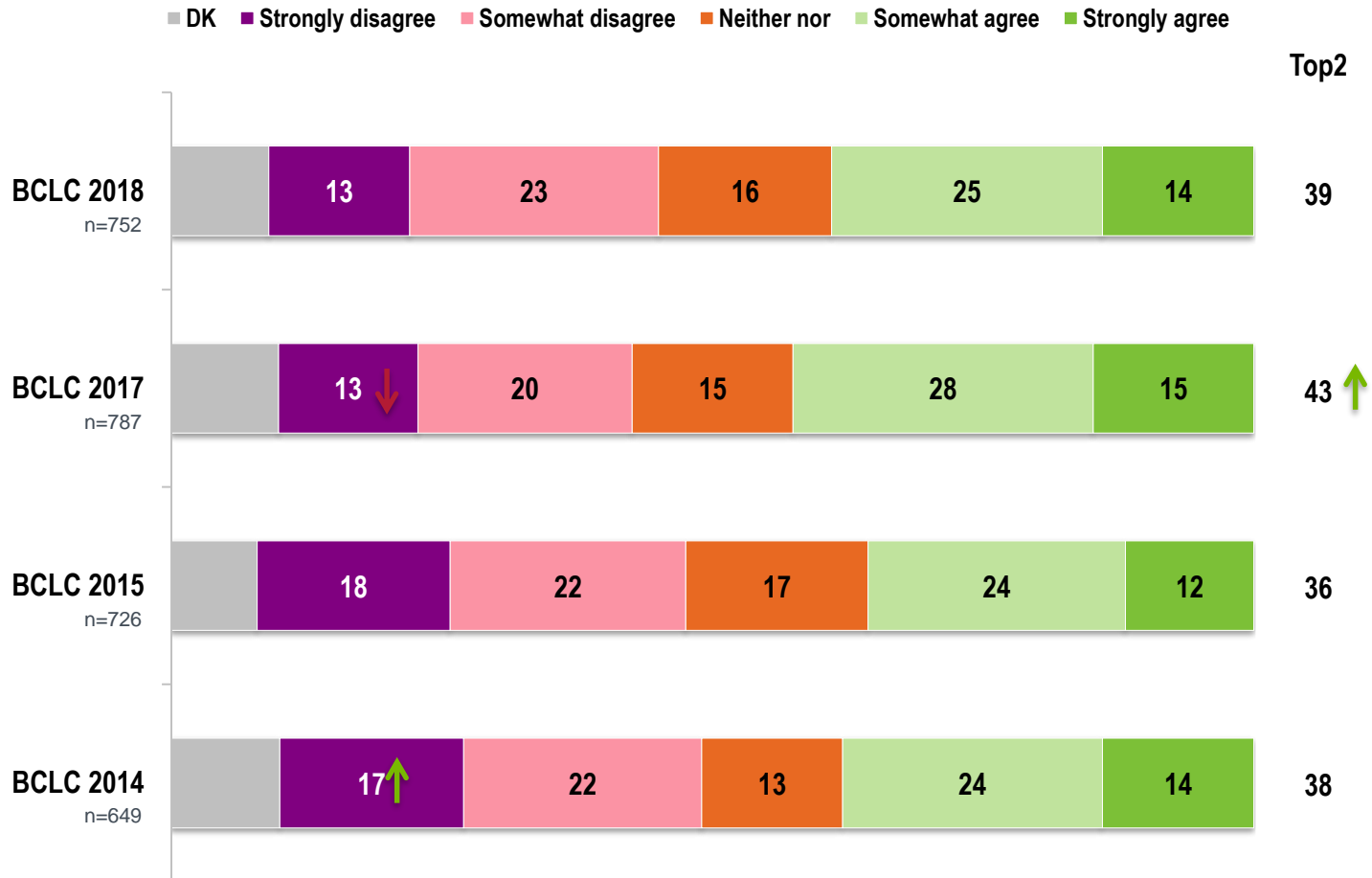
Comparable within BCLC

I feel that my overall compensation package is comparable with people doing a similar job within BCLC (%)



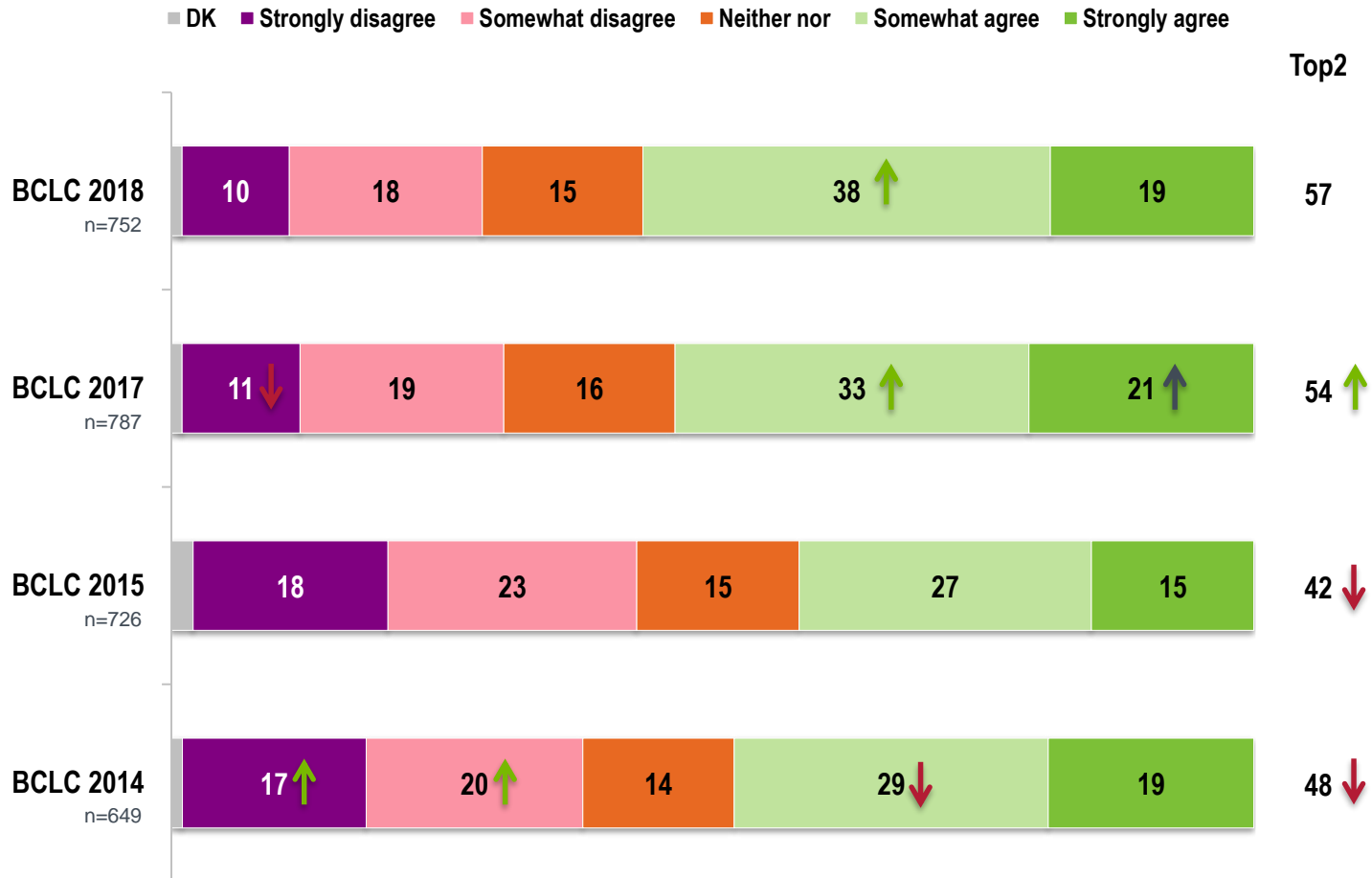
Comparable with Other Similar Organizations

I feel that my overall compensation package (pay, bonus and benefits) is comparable with people doing a similar job with other similar organizations (%)



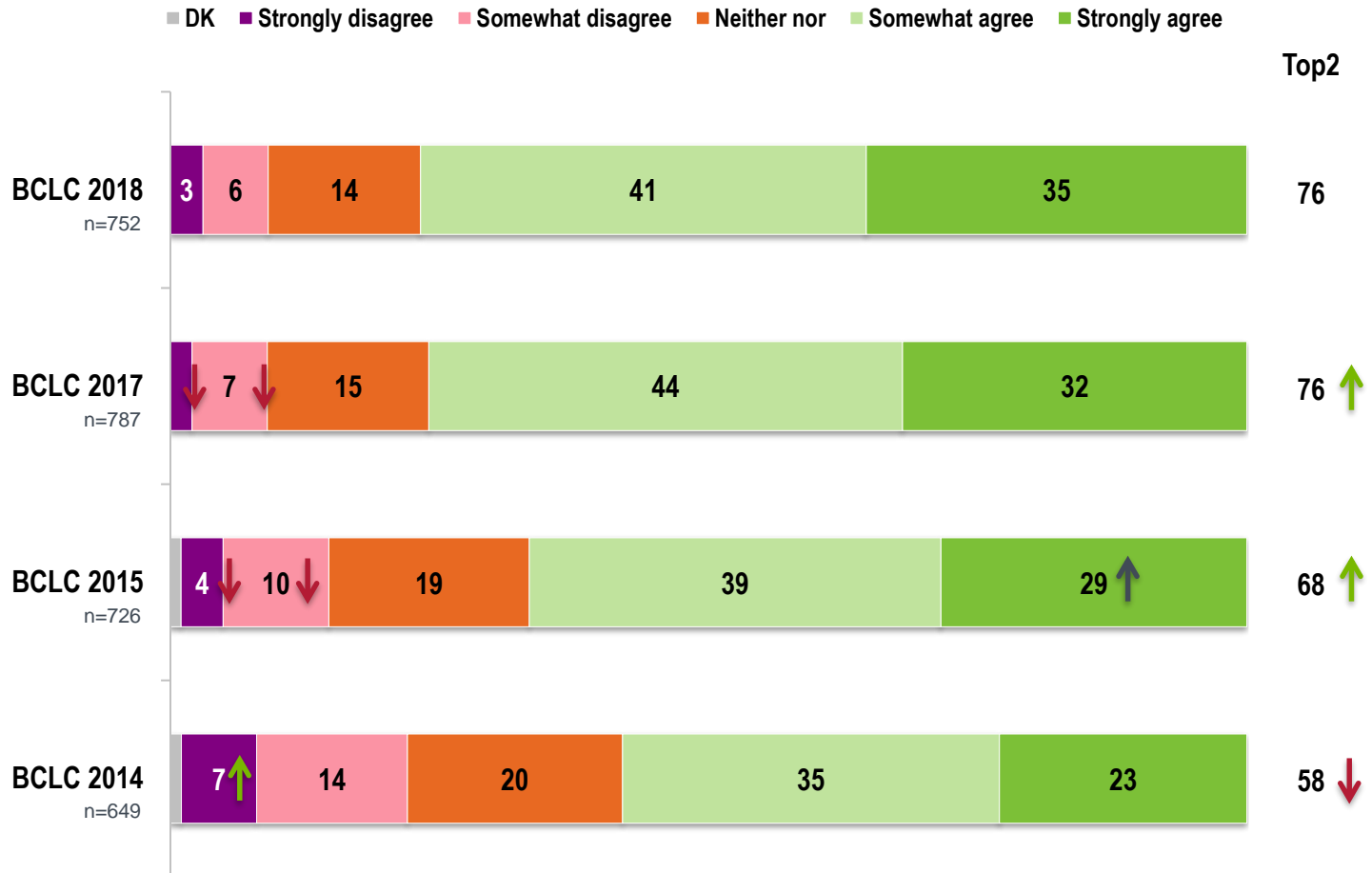
Reflect Performance

My overall compensation package (pay, bonus and benefits) reflects my performance (%)



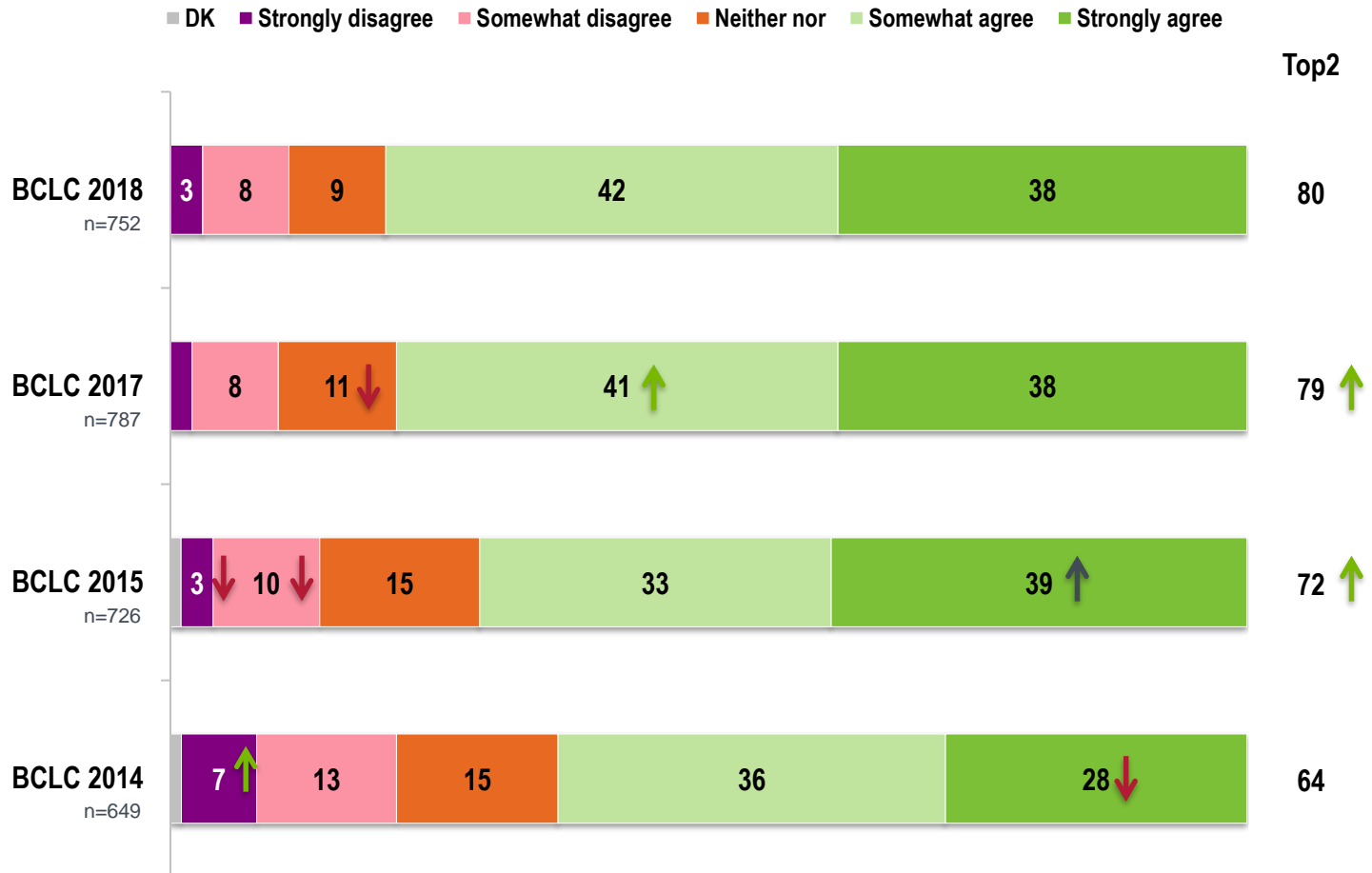
The Influence of BCLC

BCLC inspires me to do my best work (%)



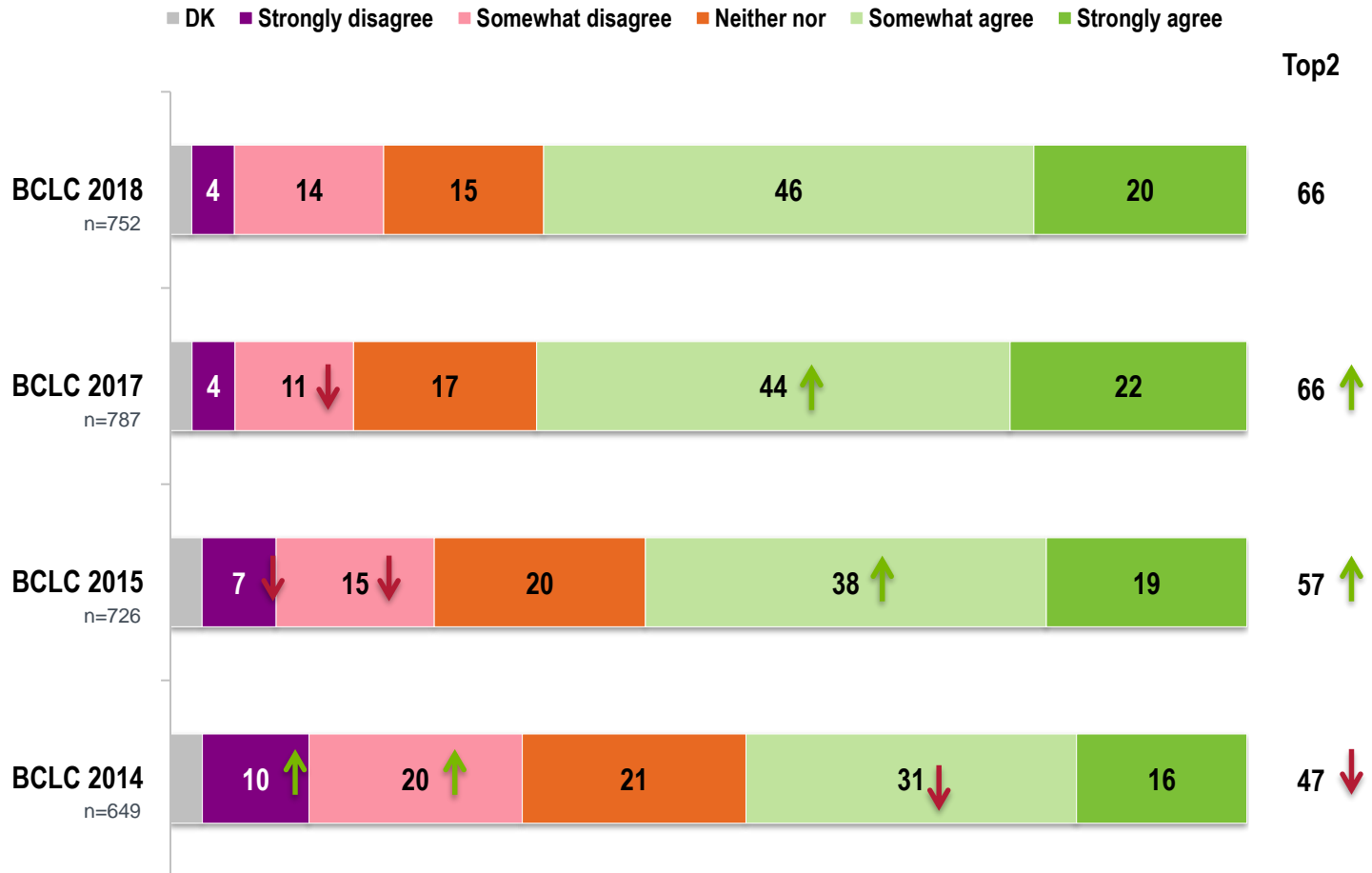
Responsibility of Job

The right conditions are in place at BCLC for me to take full responsibility of my job (%)



Developing Employees

BCLC is good at developing employees to their utmost potential (%)



↑ Significant increase from last year ↓ Significant decrease from last year

Customer Feedback is Shared

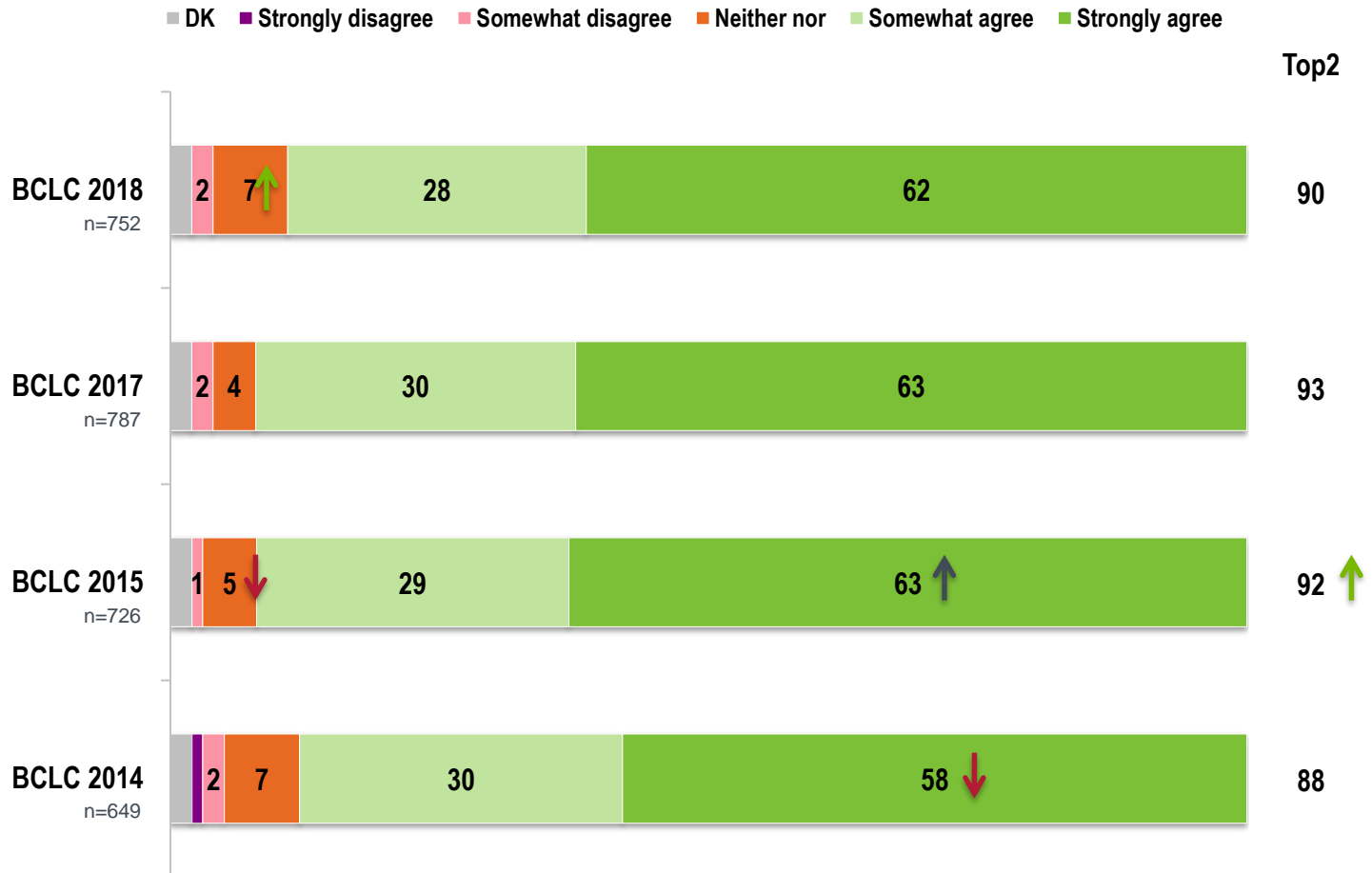
Customer feedback is shared across the company (%)



↑ Significant increase from last year ↓ Significant decrease from last year

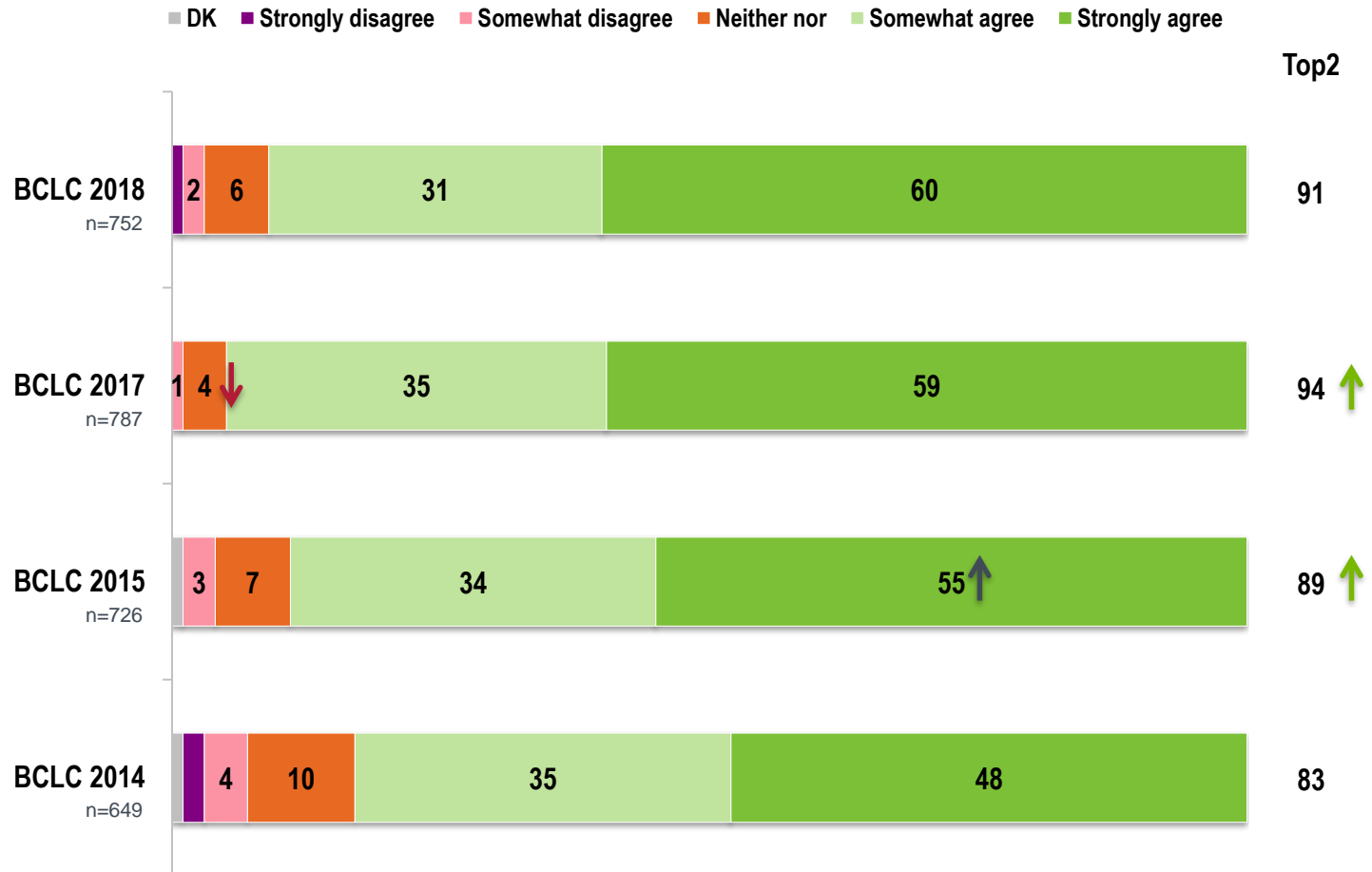
Business Conducted Fairly

BCLC consistently conducts business in a fair, honest, and trustworthy manner (%)



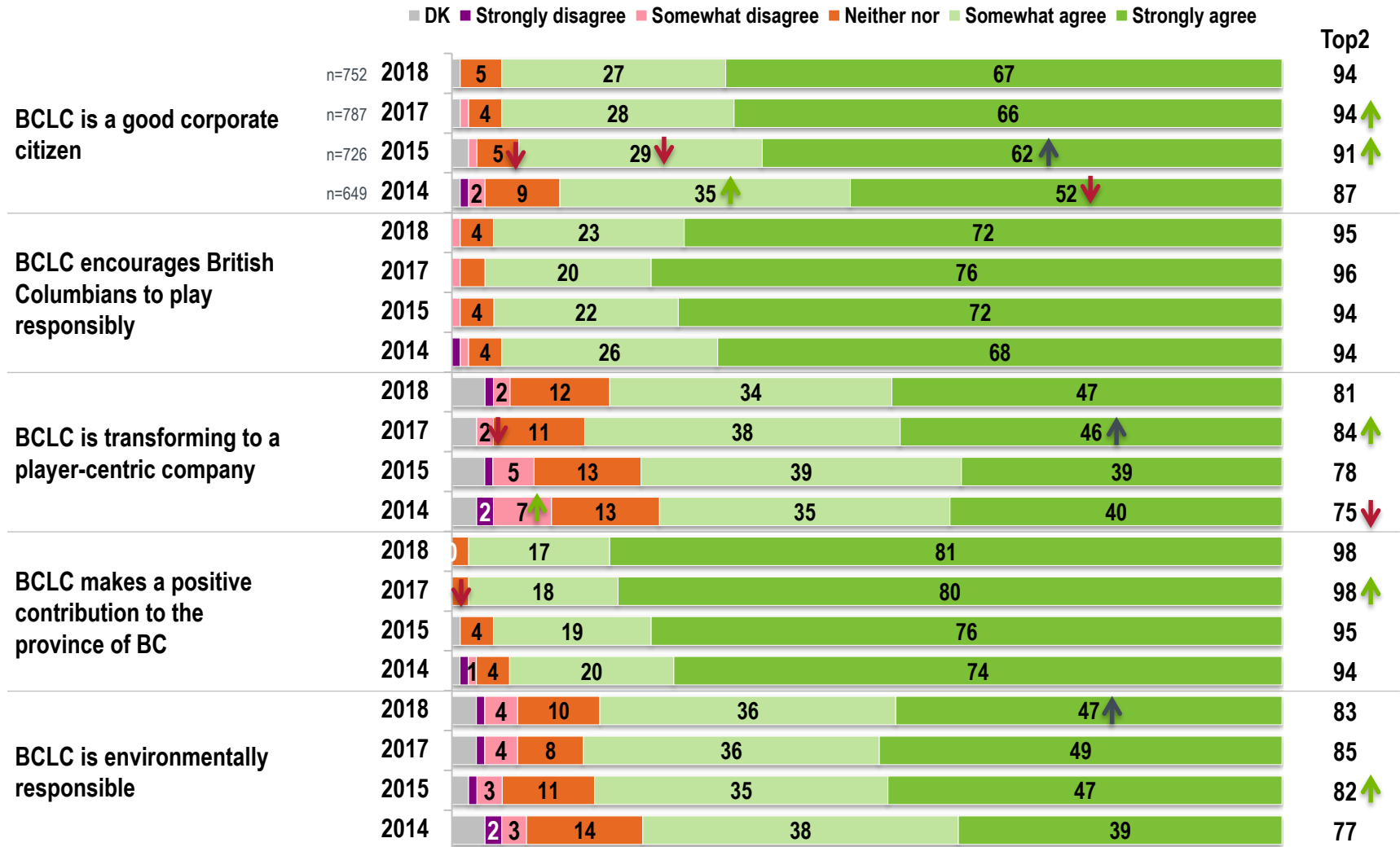
Operates in Alignment with Values

The way BCLC operates is in alignment with its values (%)



Corporate Values and Responsibilities

Corporate Responsibility



Significant increase from last year



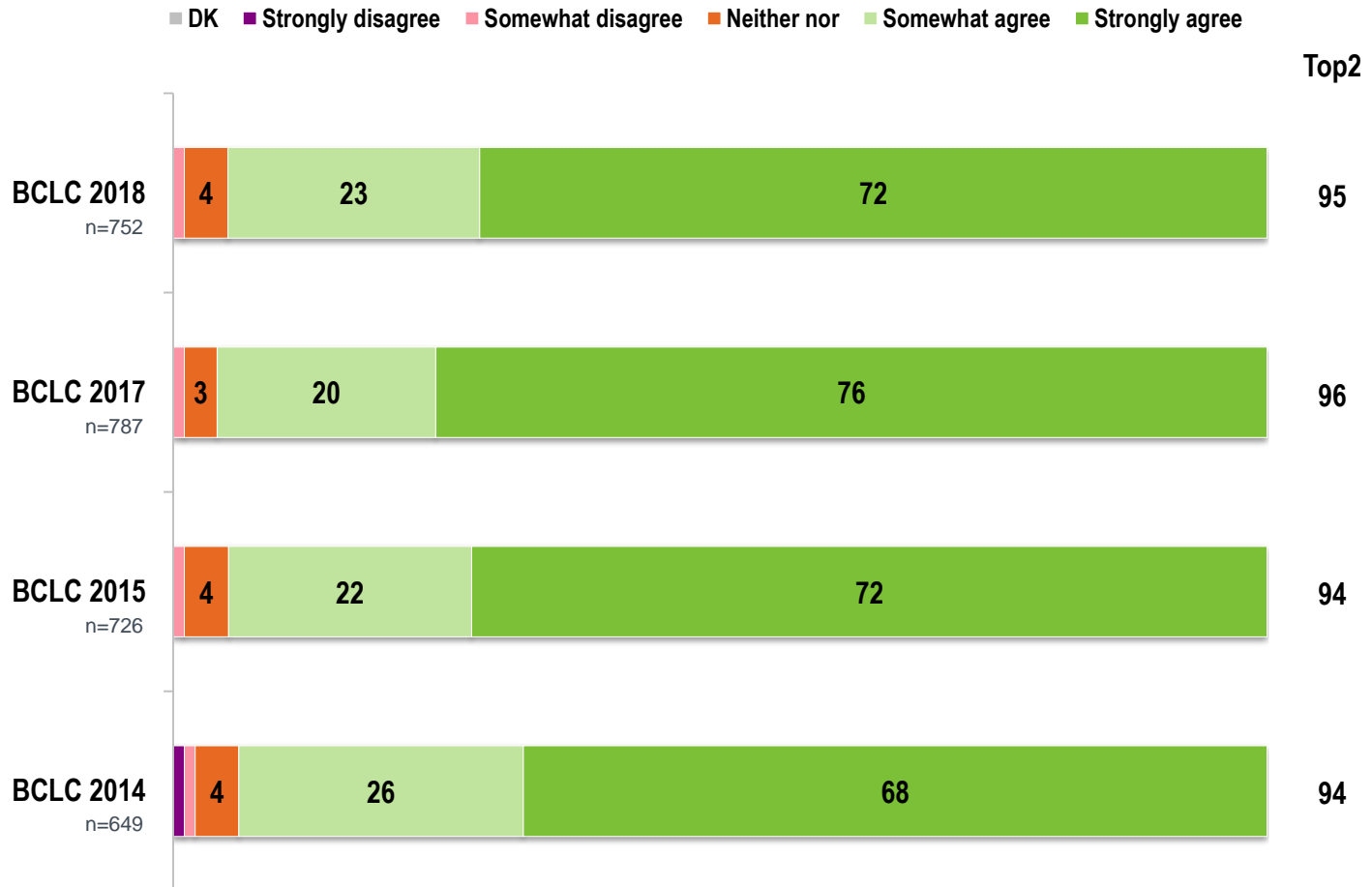
Significant decrease from last year

BCLC is a good corporate citizen (%)



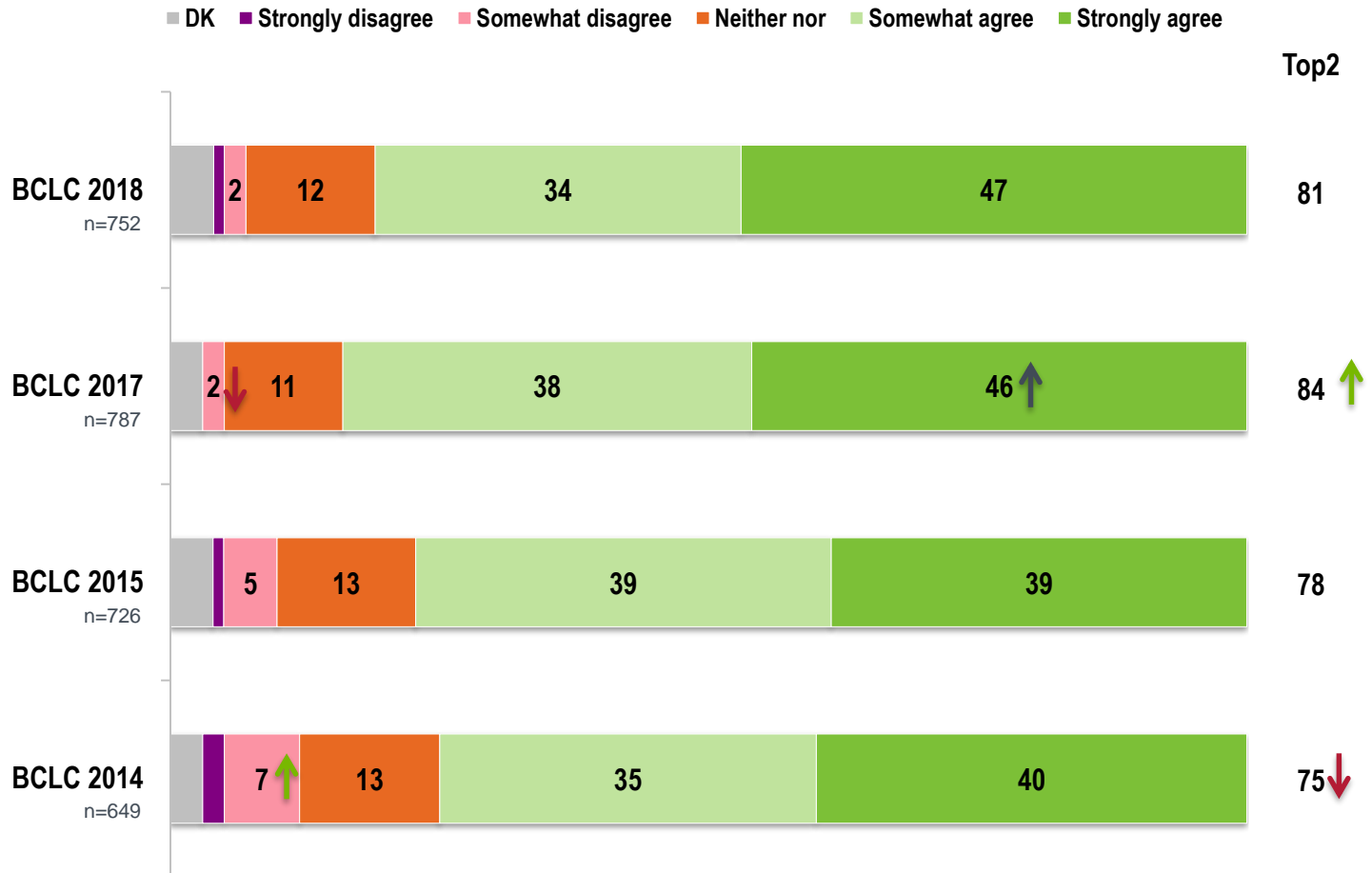
Play Responsibly

BCLC encourages British Columbians to play responsibly (%)



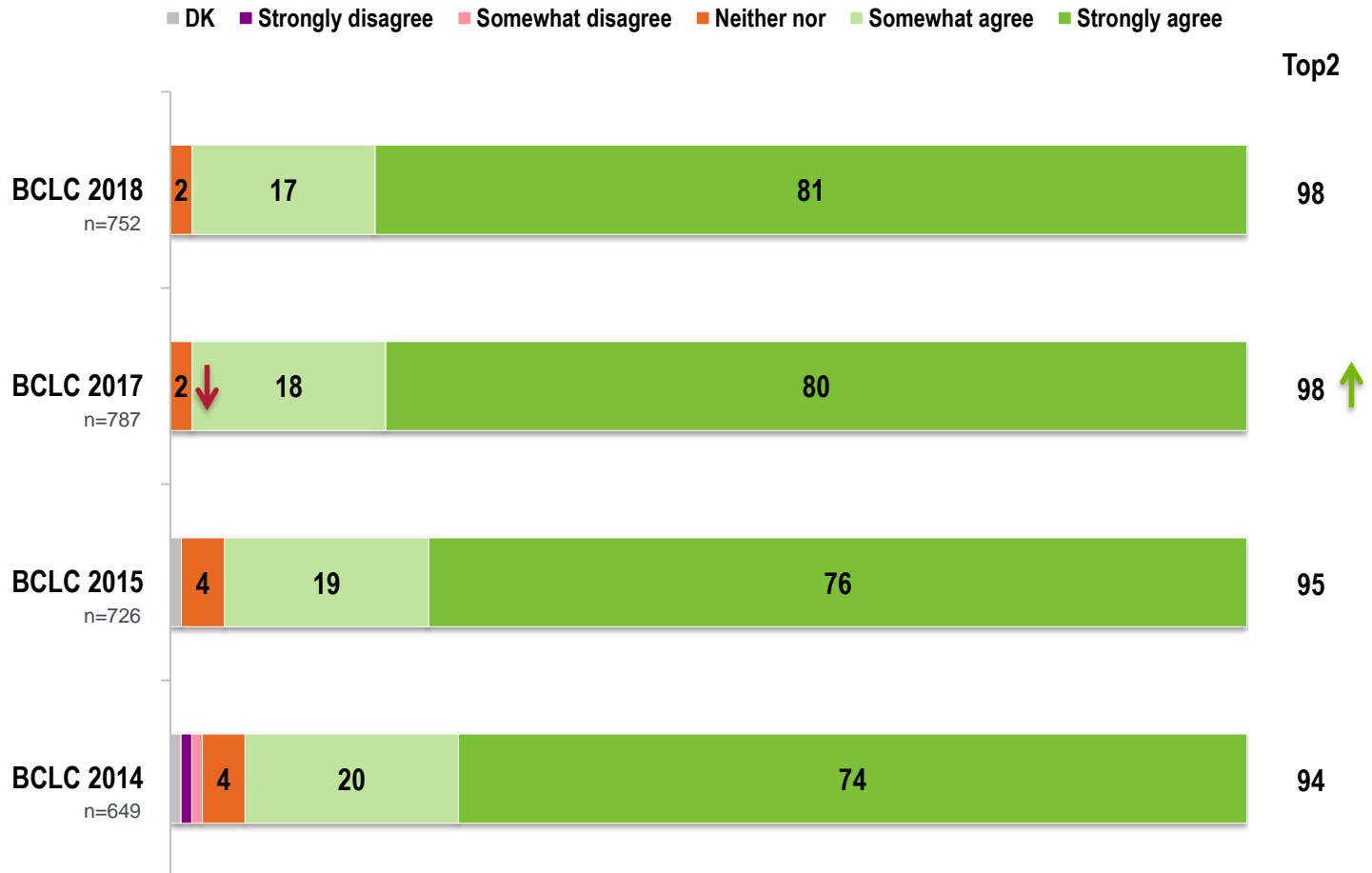
Player-Centric Company

BCLC is transforming into a player-centric company (%)



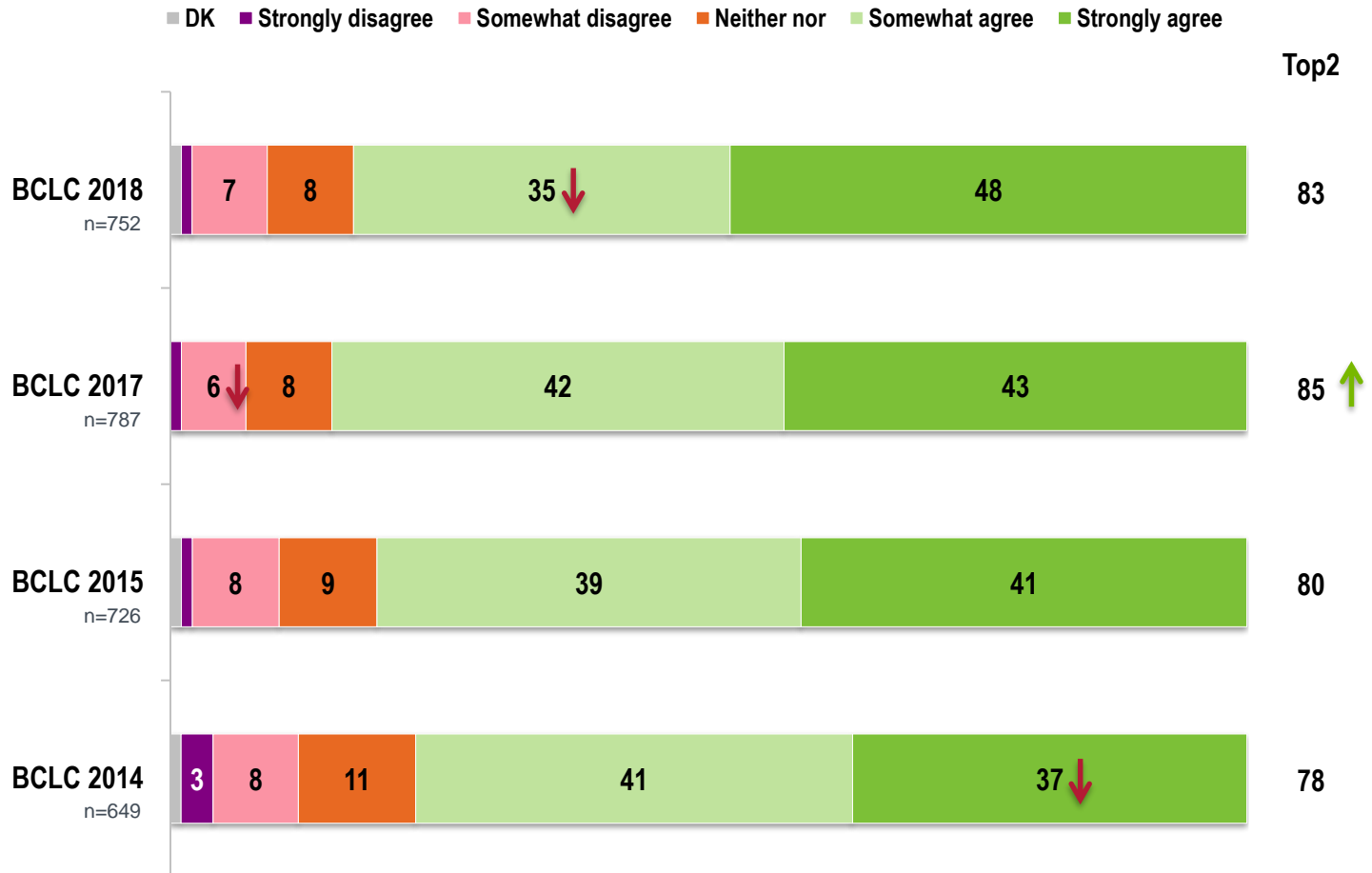
Positive Contribution to BC

BCLC makes a positive contribution to the province of BC (%)



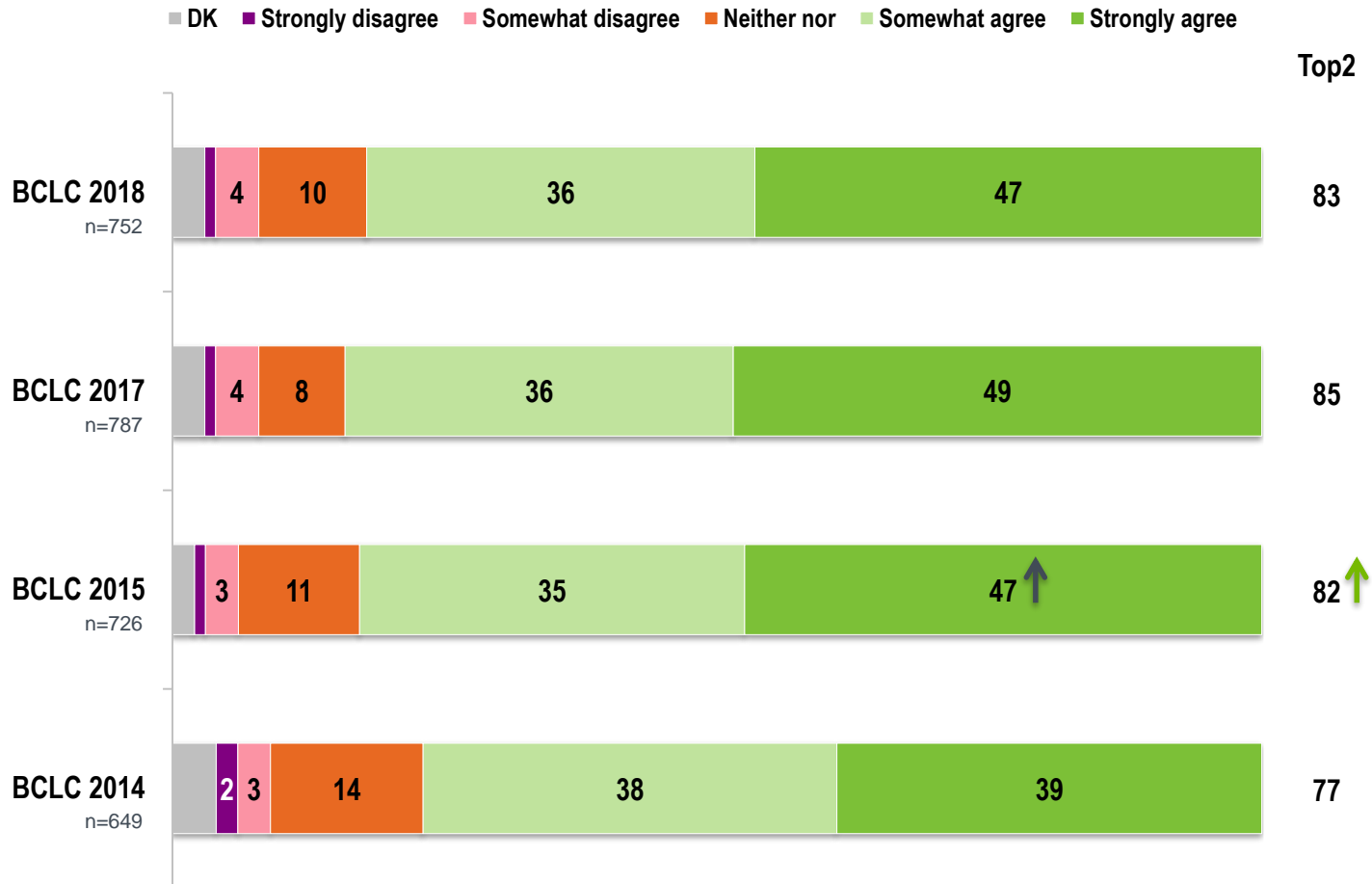
Provide Players with Exceptional Service

BCLC continuously innovates to provide players with an outstanding gambling experience (%)



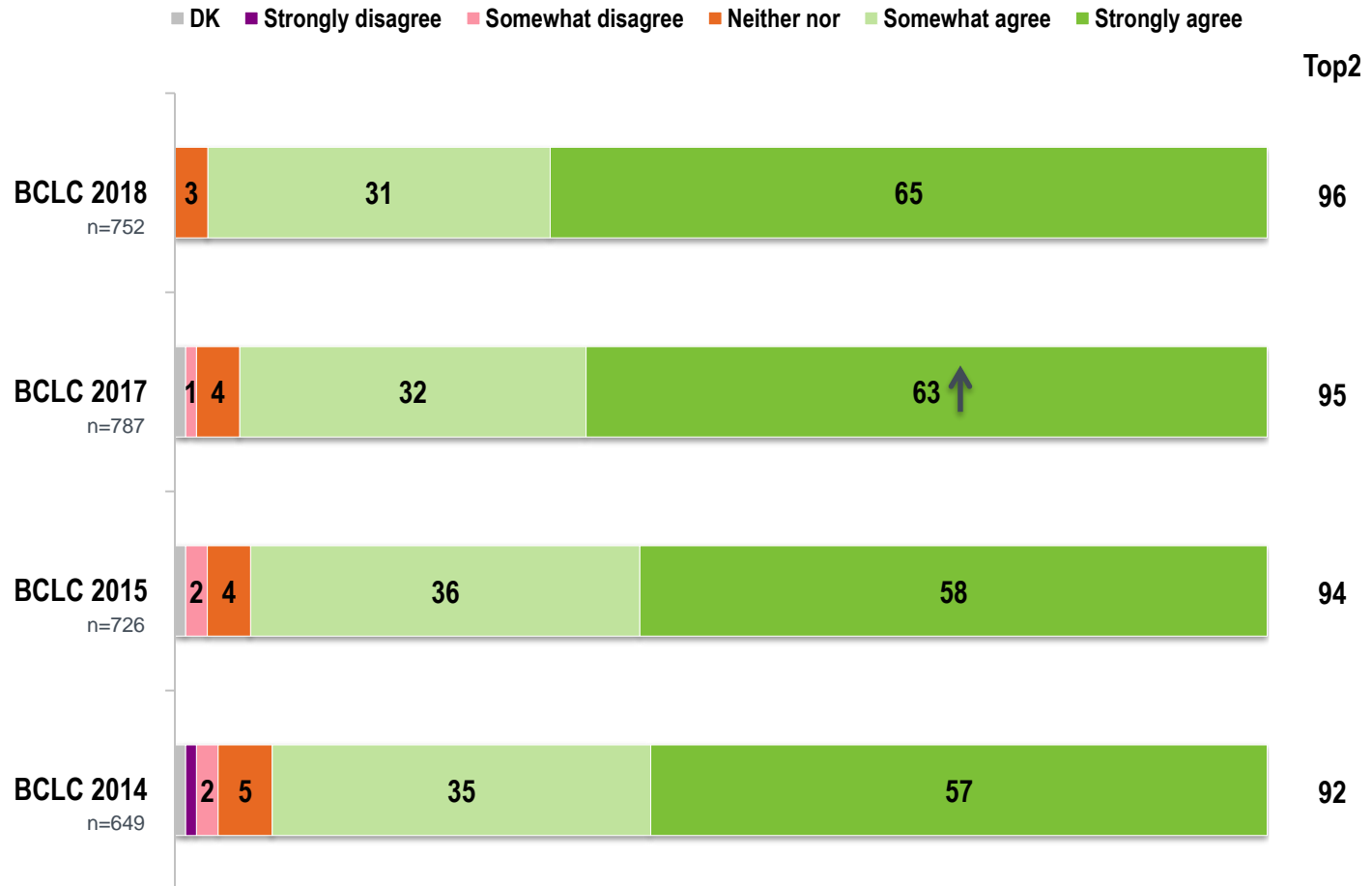
Environmentally Responsible

BCLC is environmentally responsible (%)



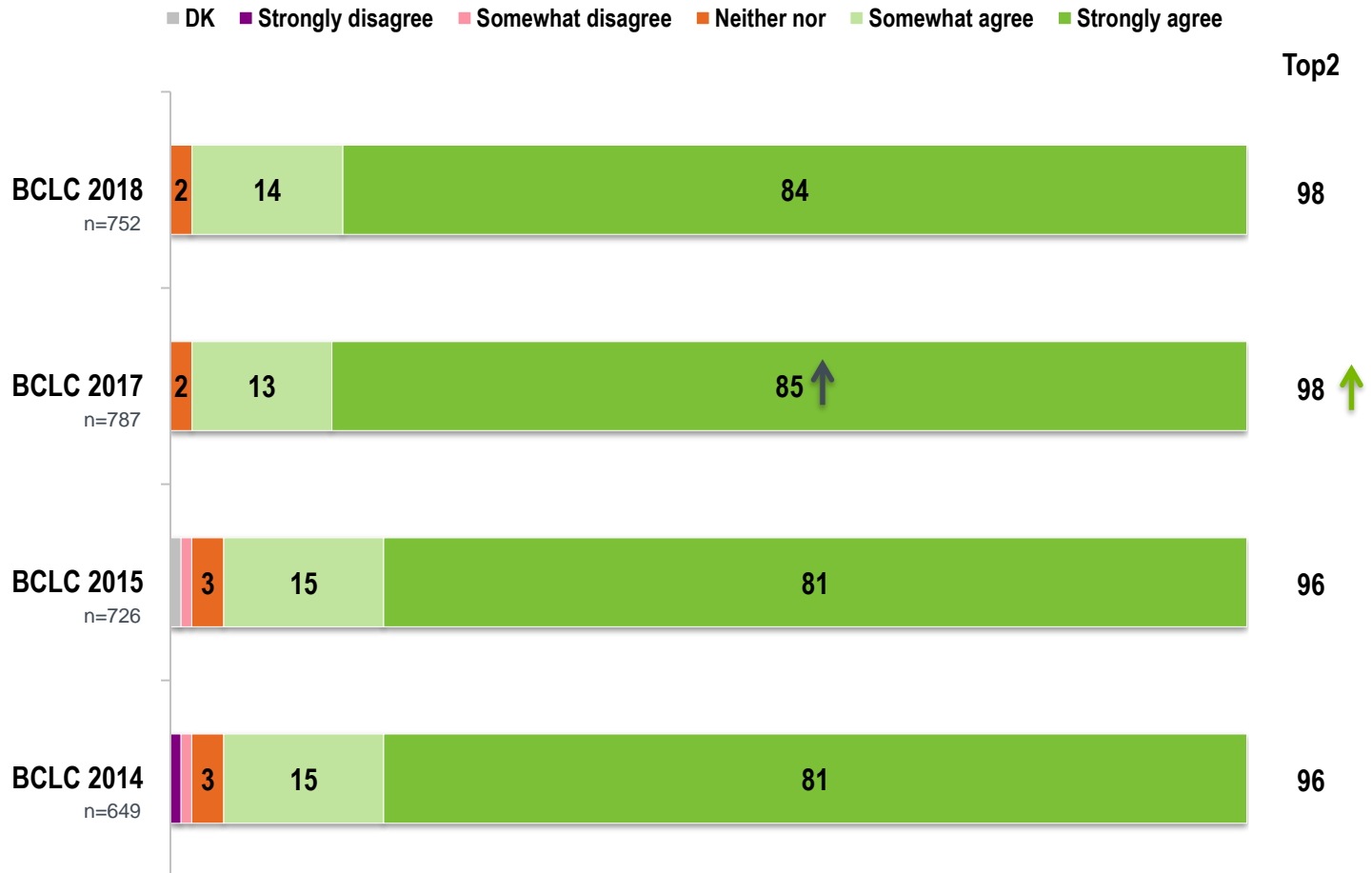
Corporate Social Responsibility

I understand what corporate social responsibility (CSR) means to BCLC (%)



Corporate Social Responsibility

If asked, I would assure friends and relatives that they can have trust and confidence in the games offered by BCLC (%)



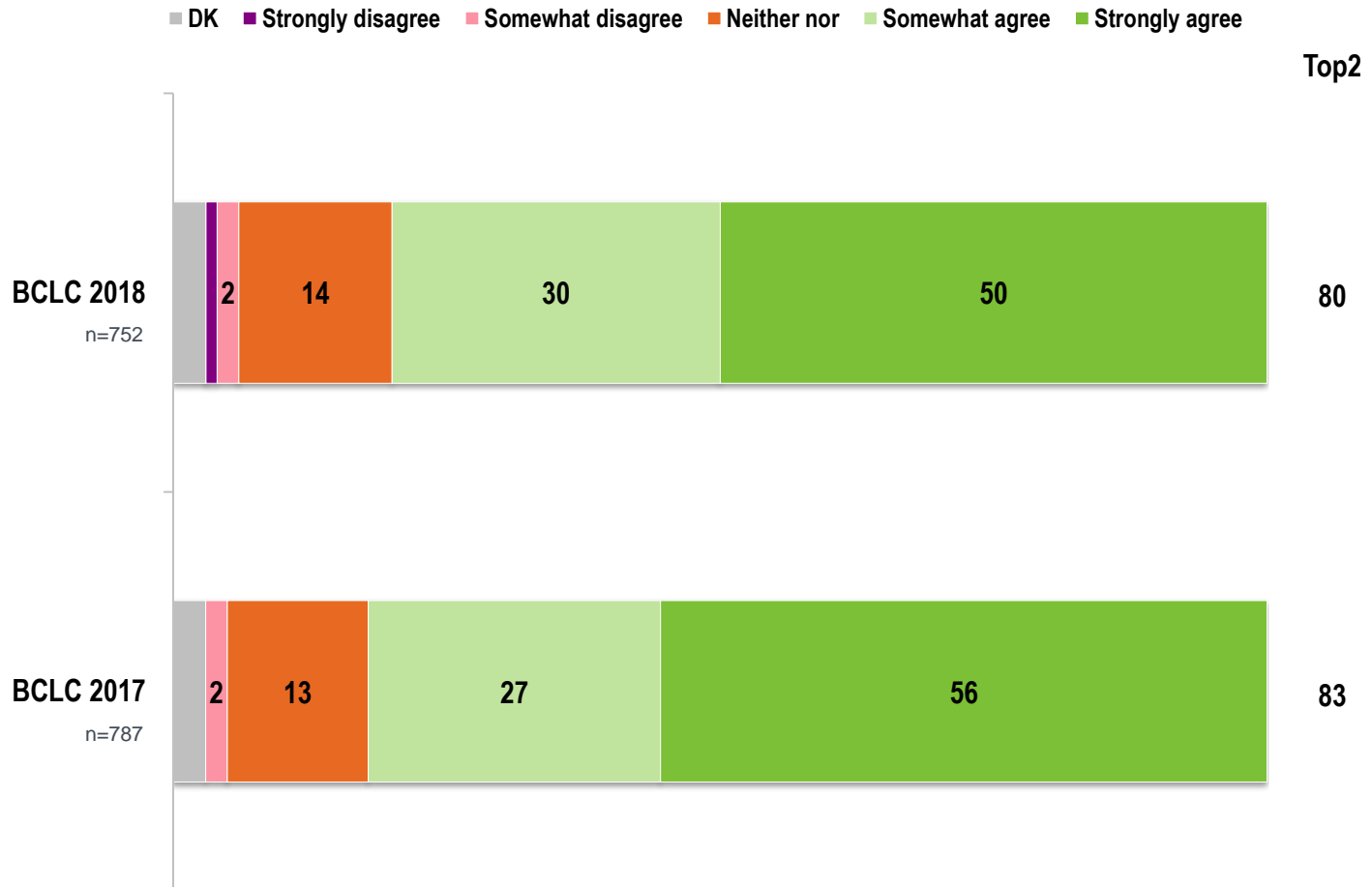
Corporate Social Responsibility

BCLC does everything it can to reduce gambling related harm in BC (%)



Corporate Social Responsibility

I consider responsible gambling implications when making business decisions in my role at BCLC (%)



Corporate Social Responsibility

Customer feedback is shared across the company (%)

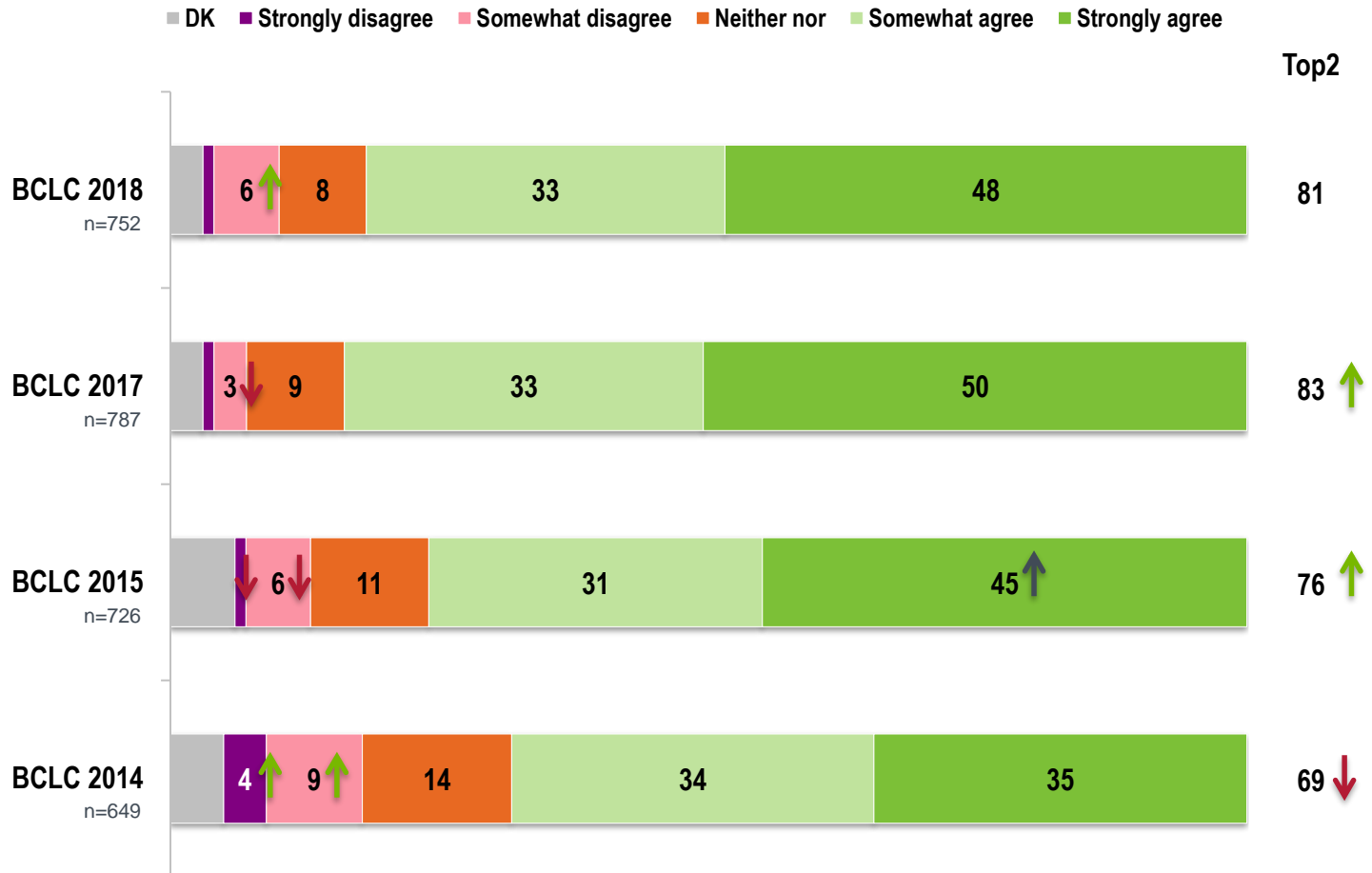


↑ Significant increase from last year ↓ Significant decrease from last year

Senior Leadership

Senior Leadership Team Follows Values

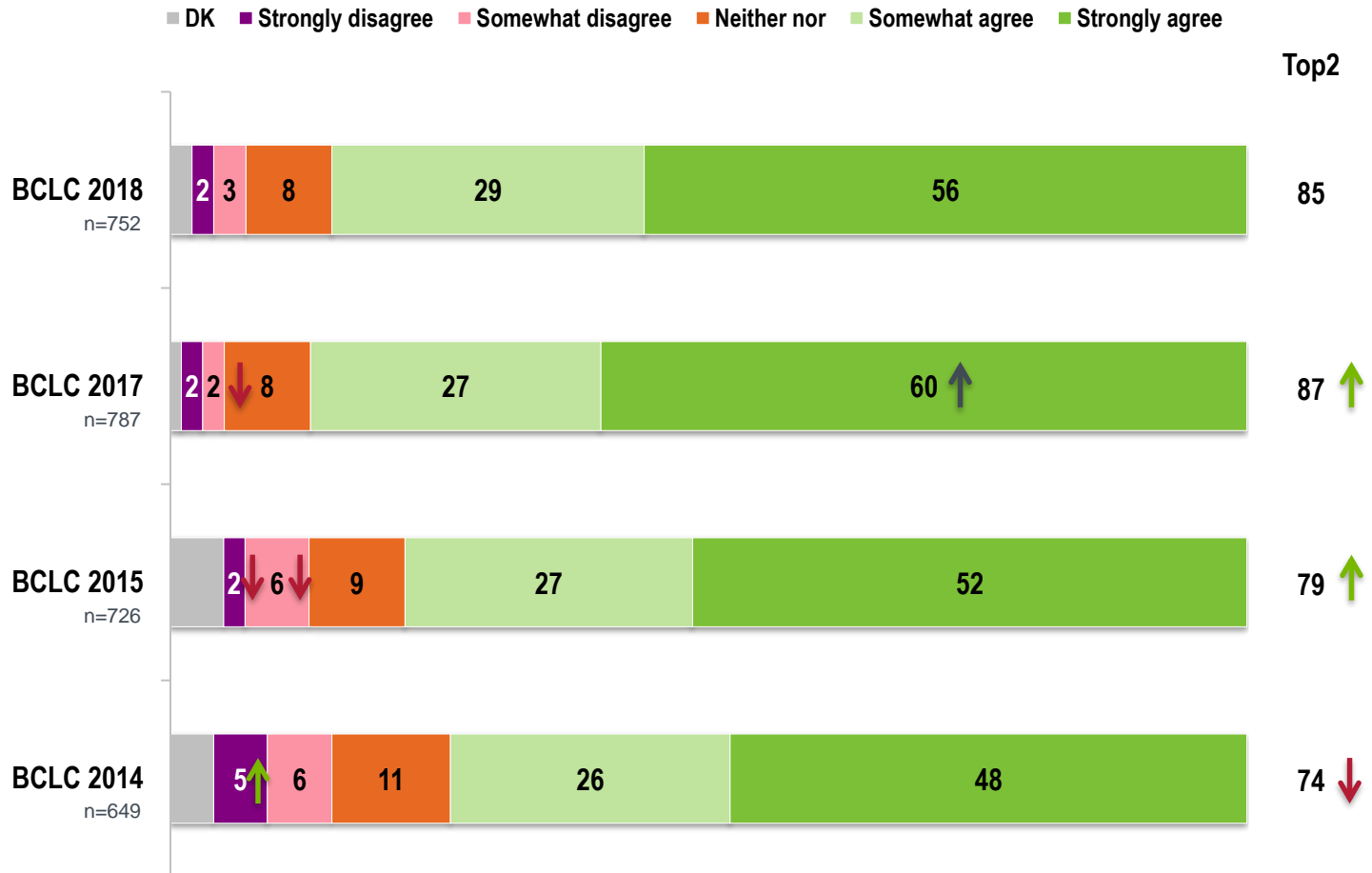
The actions of the entire Senior Leadership team of BCLC are consistent with BCLC values (%)



↑ Significant increase from last year ↓ Significant decrease from last year

Division's Senior Leadership Team Follows Values

The actions of my division's Senior Leadership team are consistent with BCLC values (%)



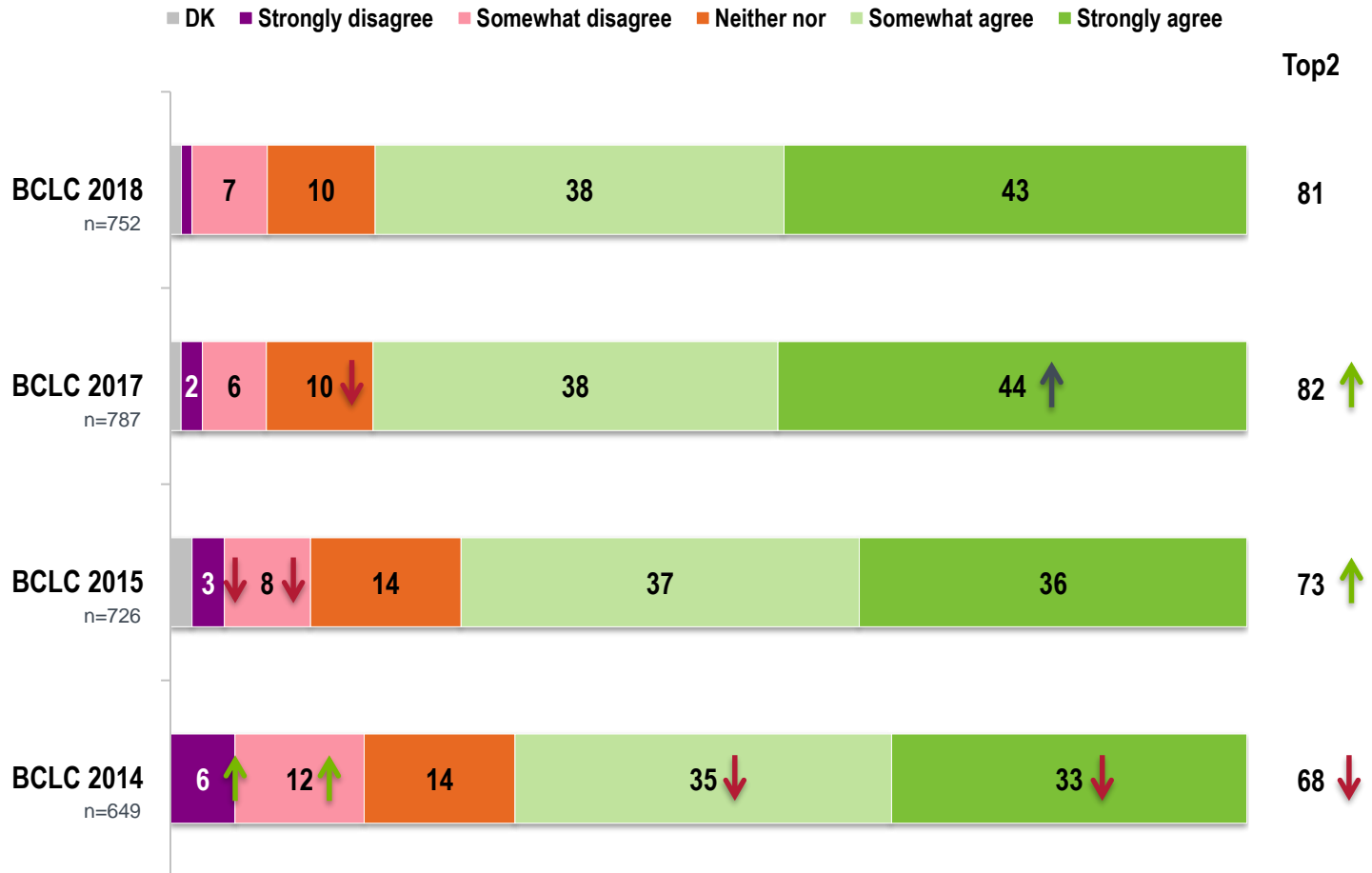
Significant increase from last year



Significant decrease from last year

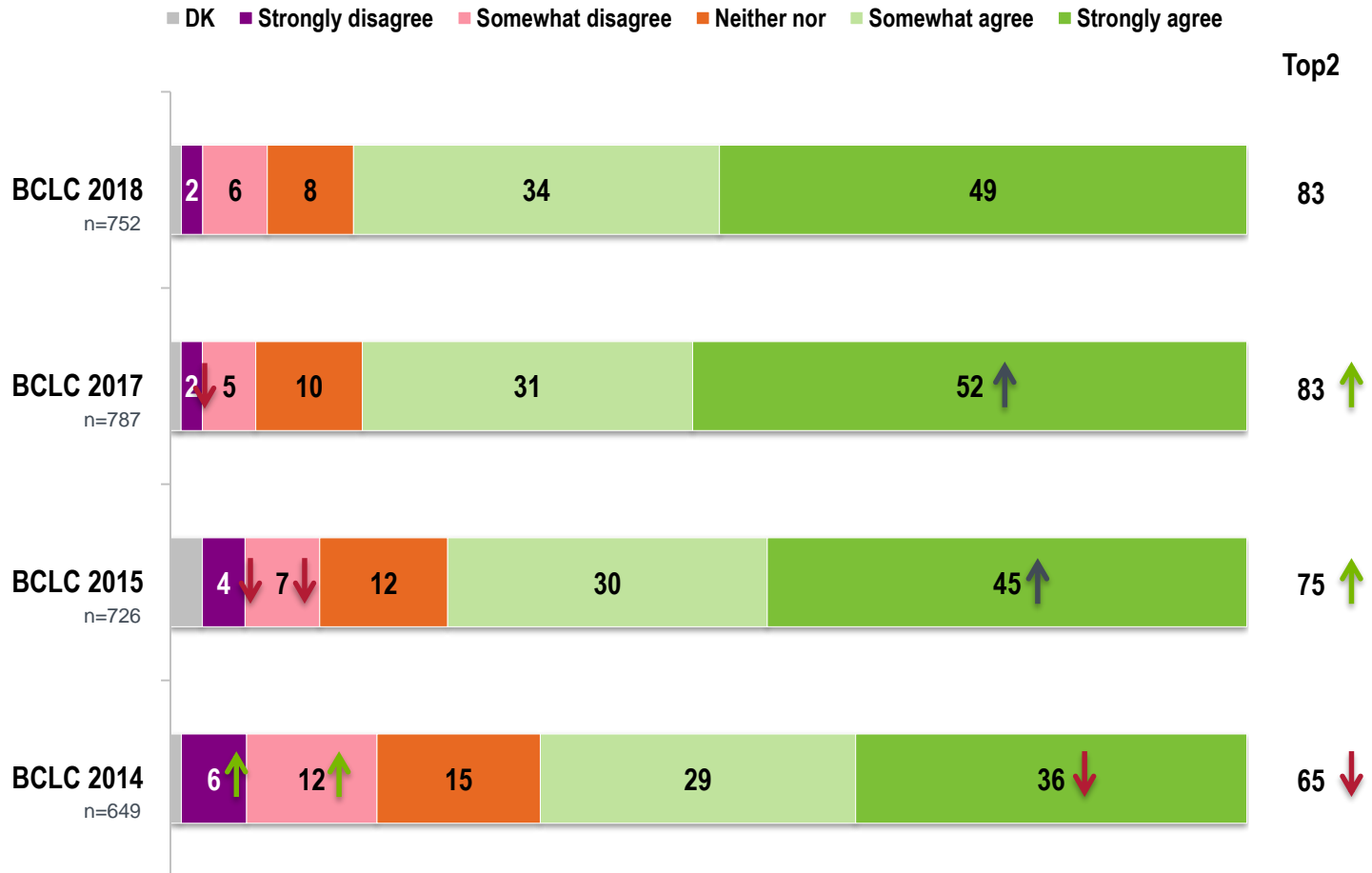
Communication of BCLC Vision

The entire Senior Leadership team communicates a clear vision of where BCLC is going (%)



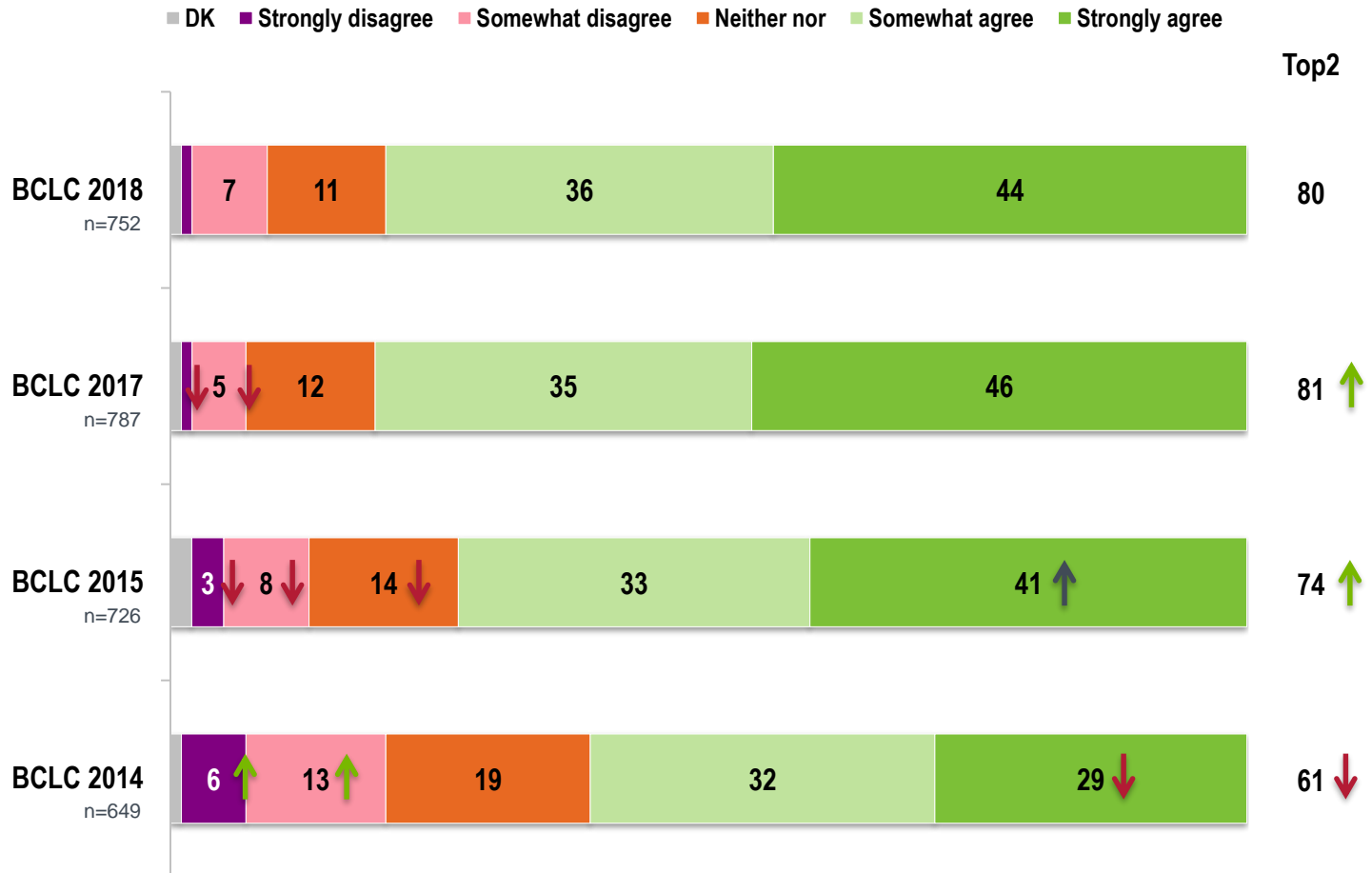
Confidence in Decisions Made by Division's SLT

I have confidence in the decisions made by my division's Senior Leadership team (%)



Confidence in Decisions Made by Division's SLT

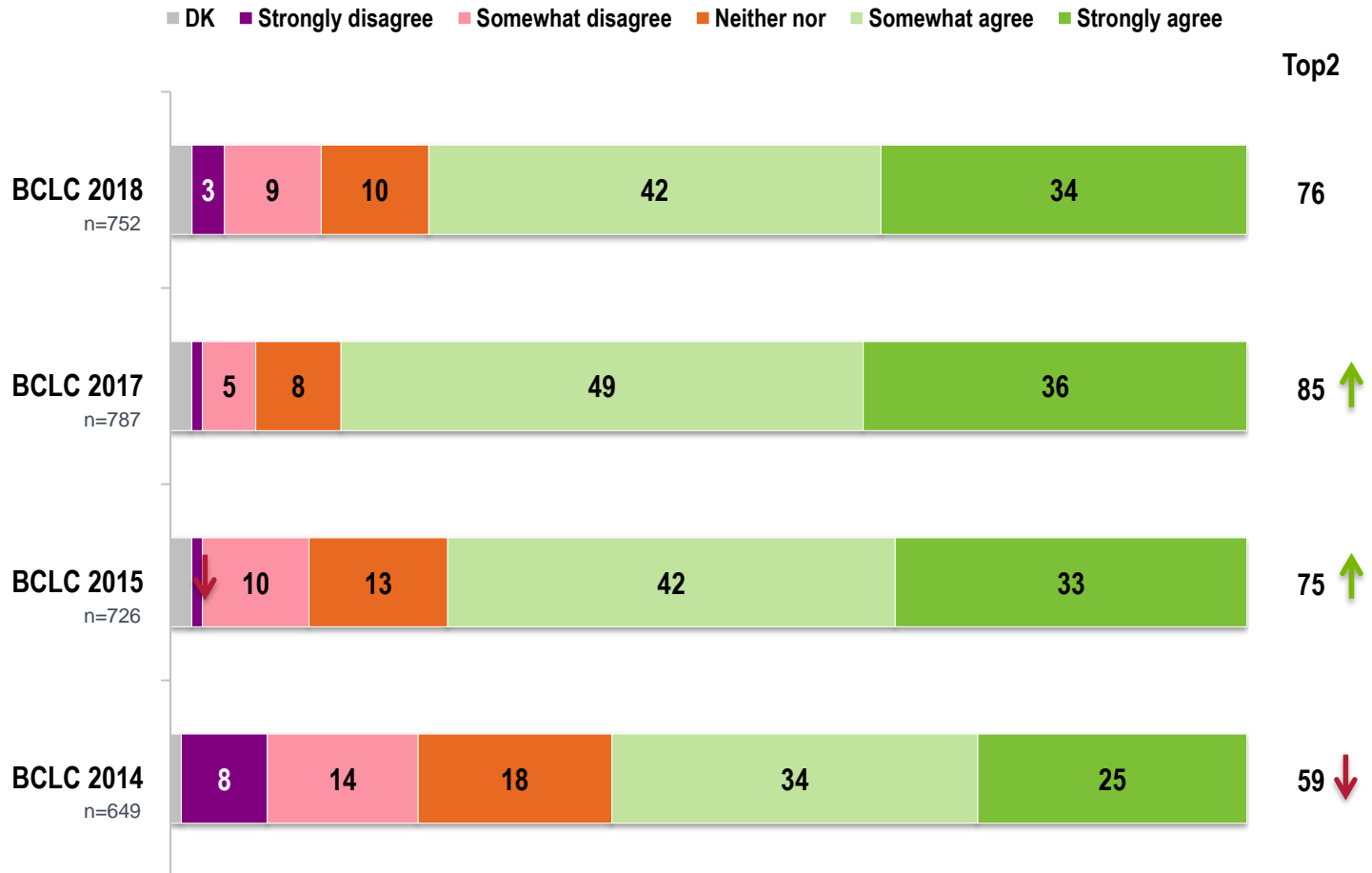
I have confidence in the decisions made by the entire Senior Leadership team (CEO, VPs and Directors) of BCLC (%)



↑ Significant increase from last year ↓ Significant decrease from last year

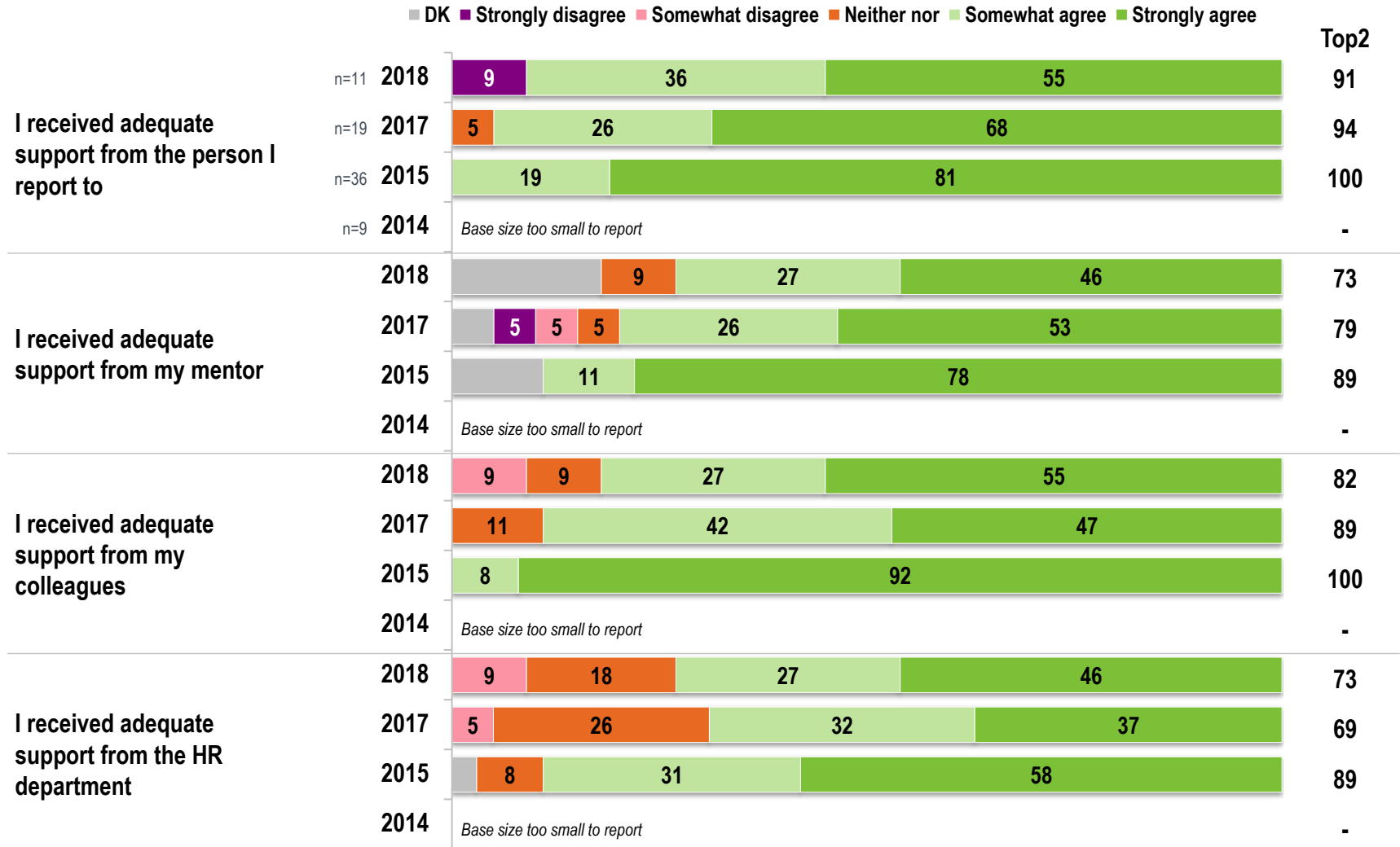
SLT Supports Good Leadership Practices

The entire Senior Leadership team reflects and supports the leadership practices necessary to make BCLC successful (%)



Training and On-Boarding

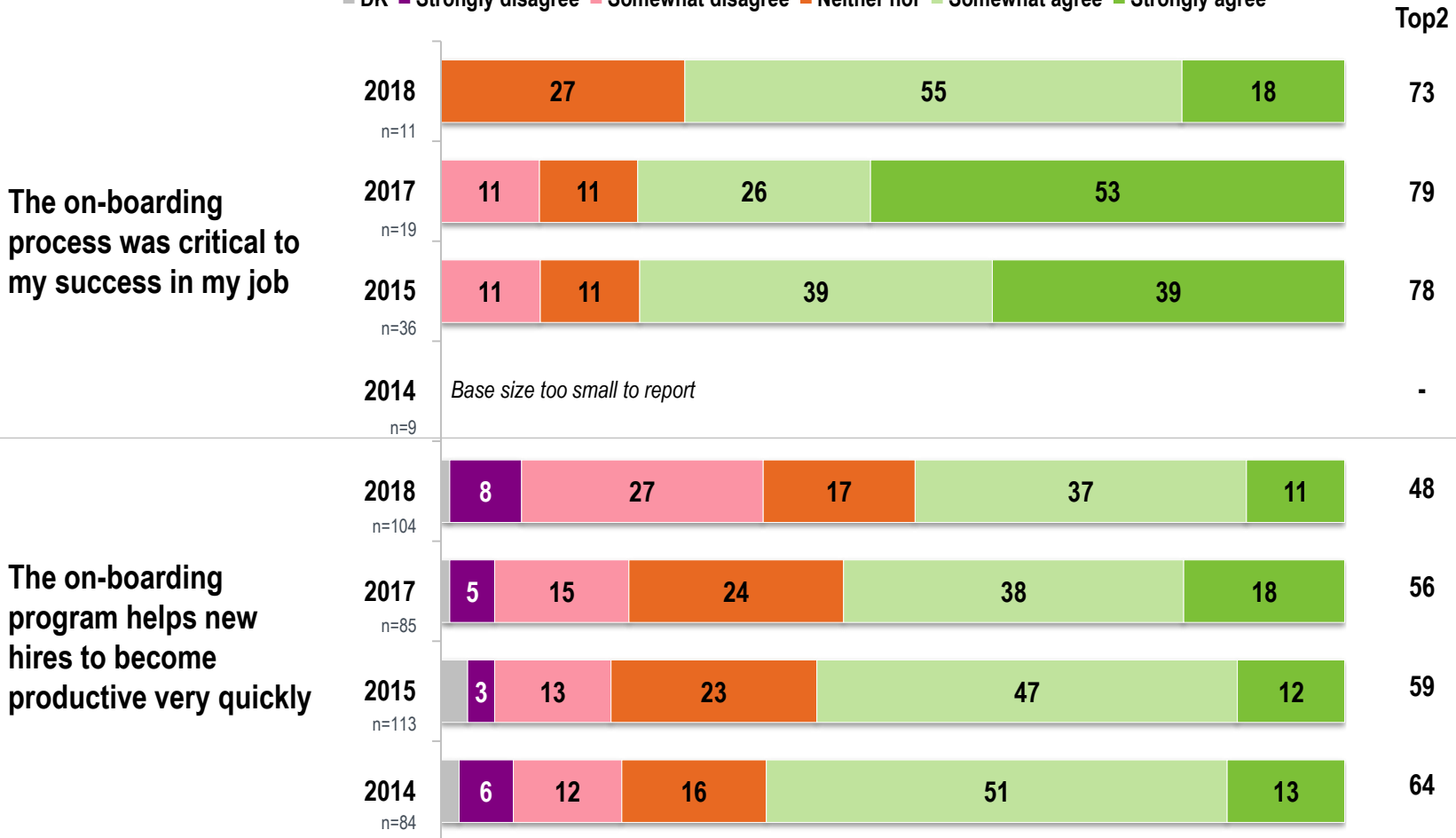
Support Offered to New Hires



Evaluation of the On-Boarding Process

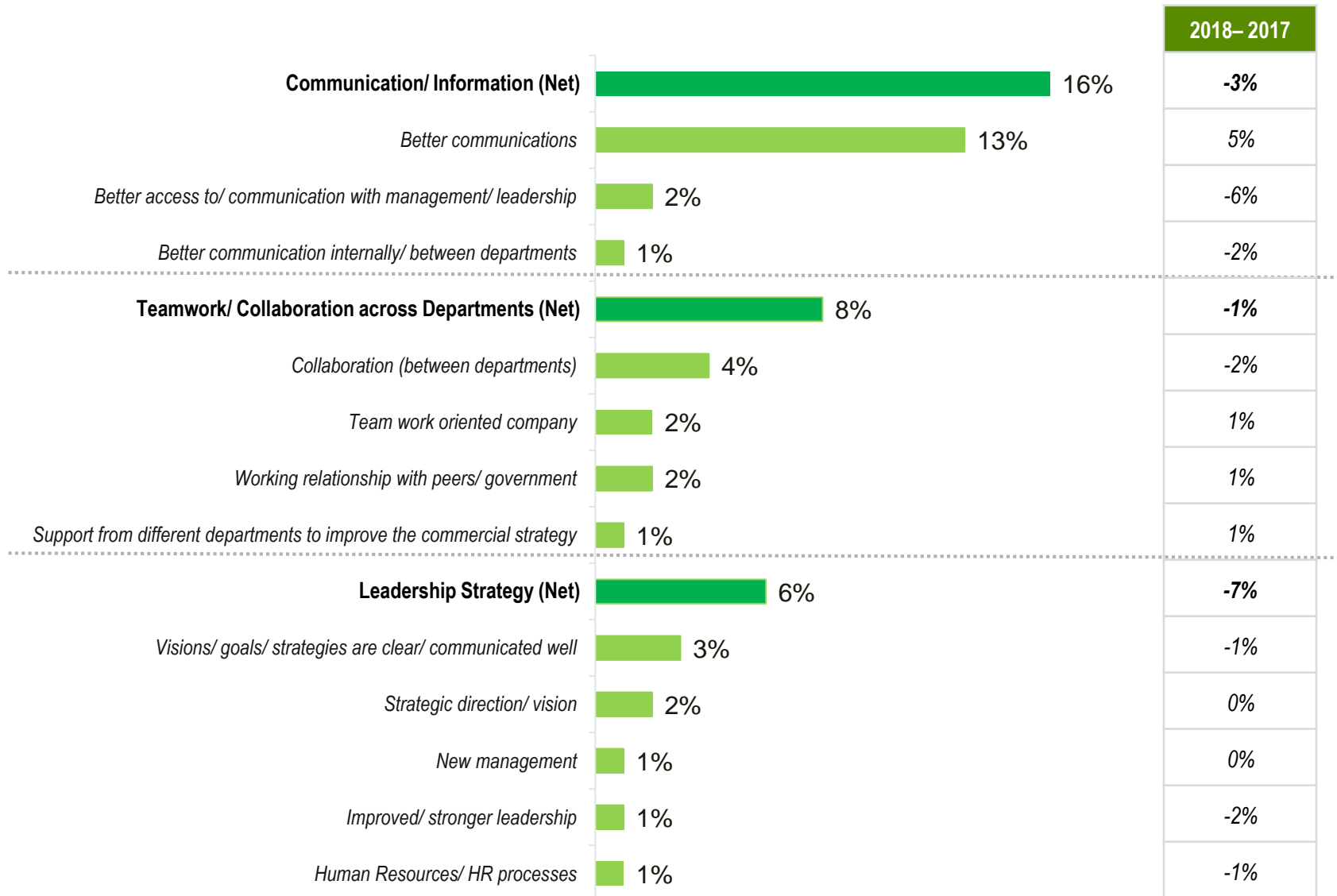
Please rate your agreement with the statements below ... (%)

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

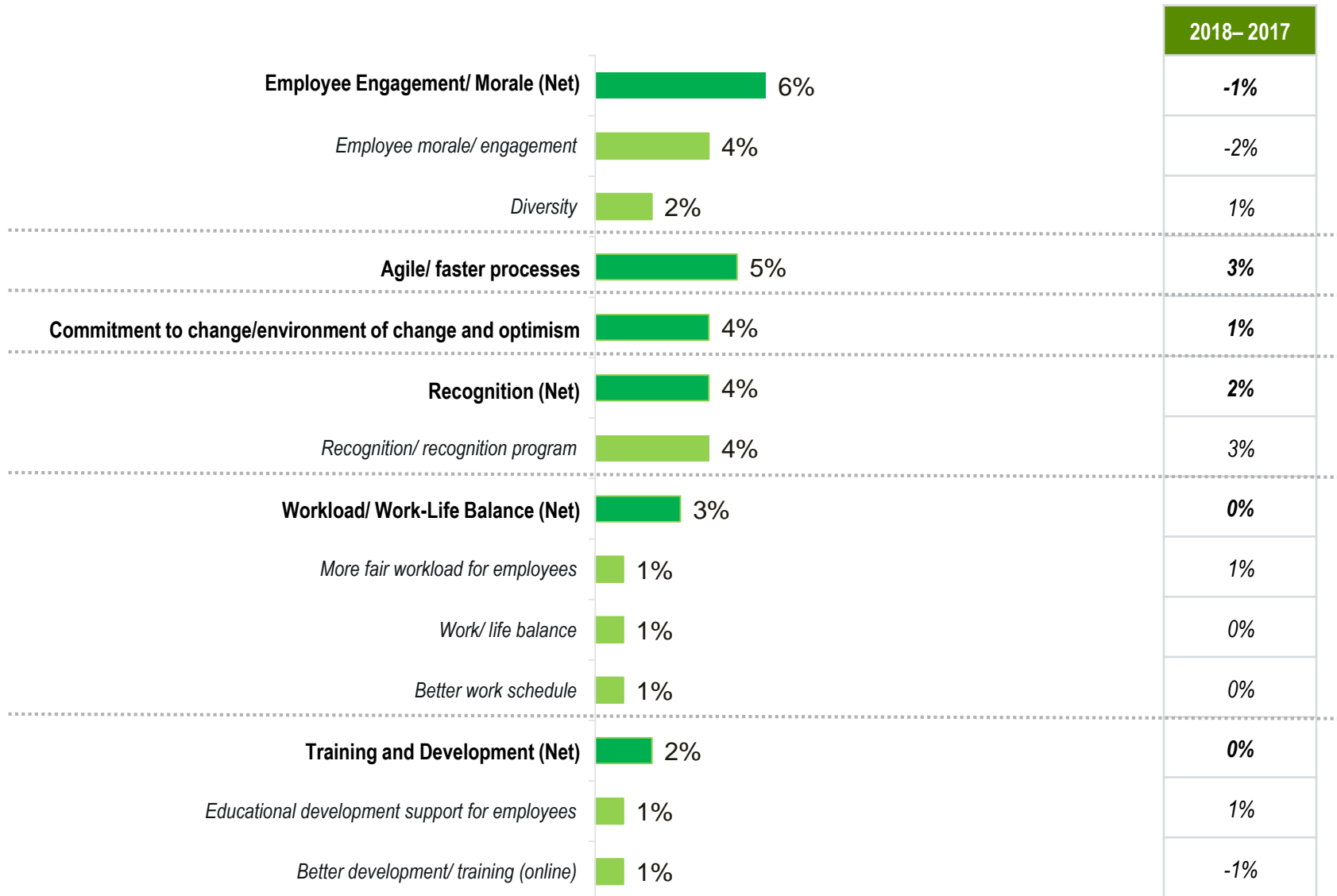


Appendix

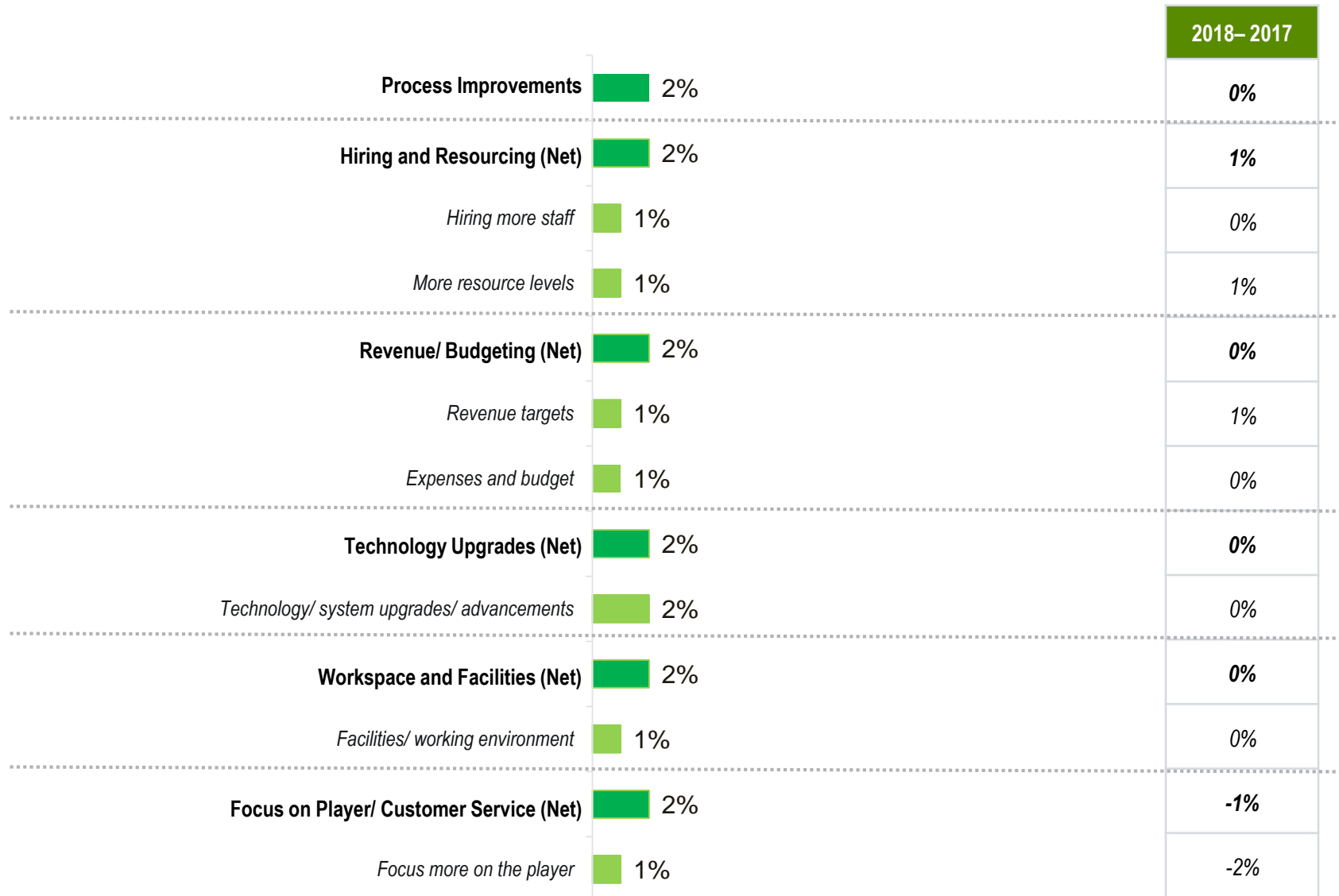
Significant Improvements at BCLC in Past Year (Coded Verbatims)



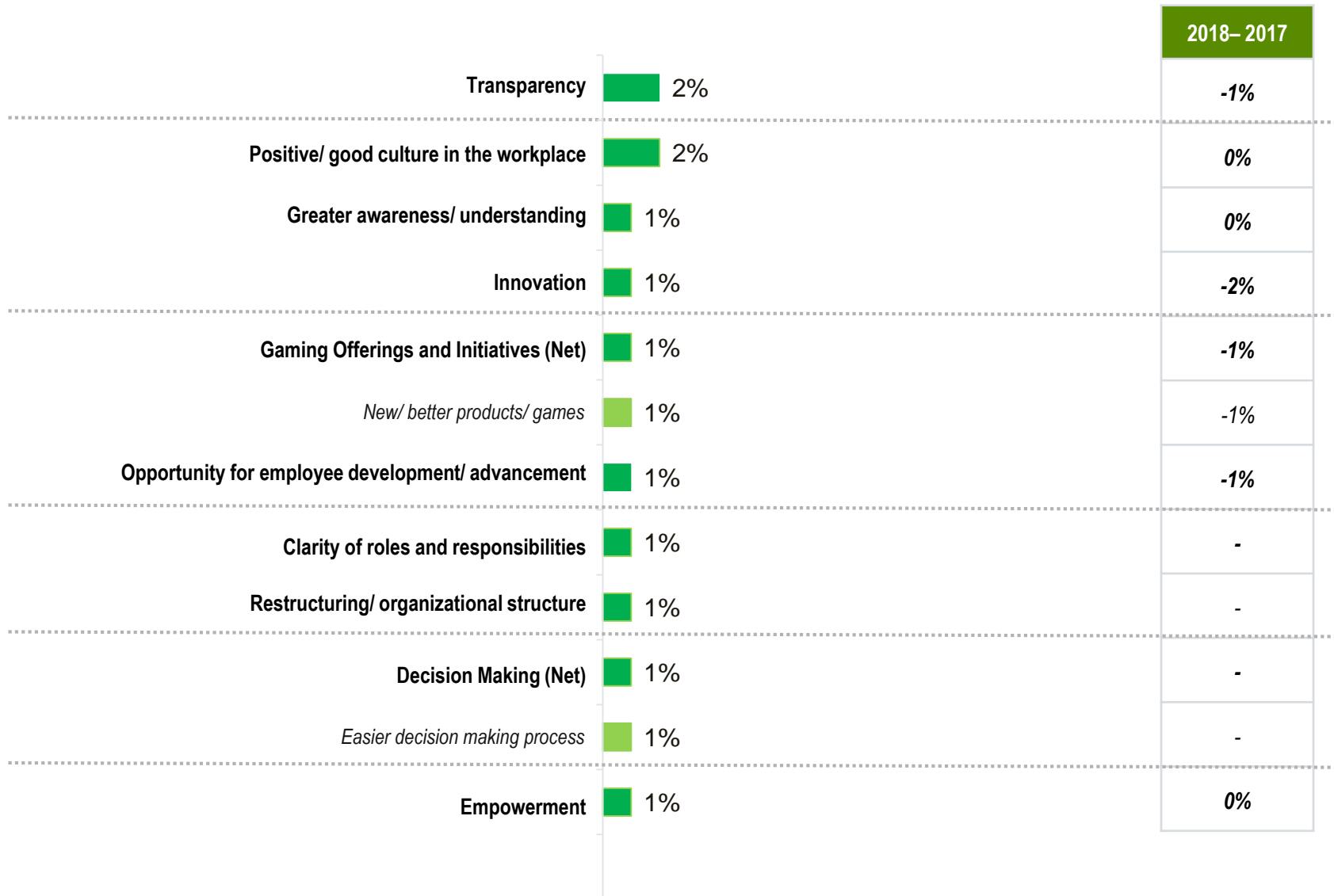
Significant Improvements at BCLC in Past Year (Coded Verbatims)



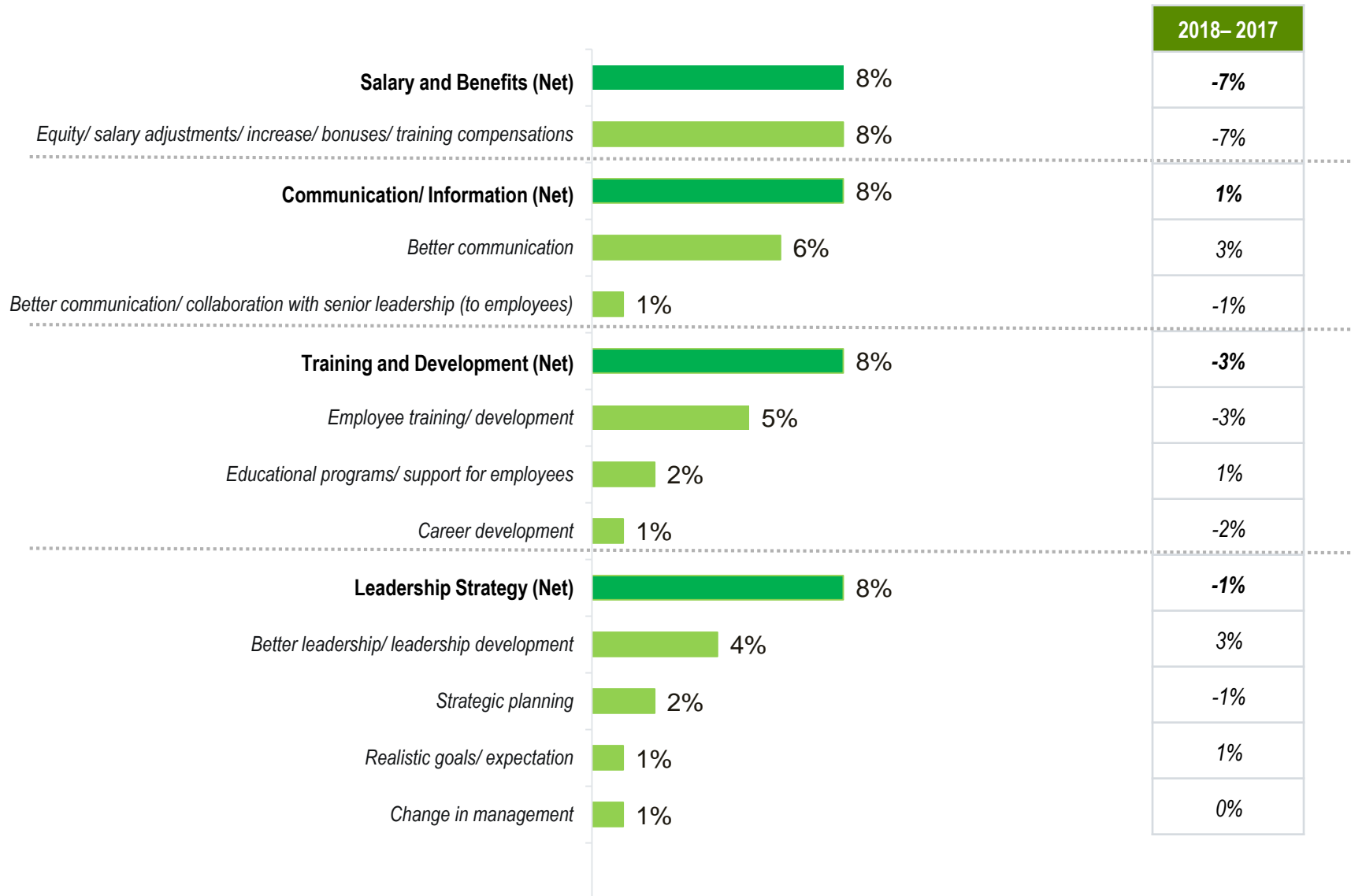
Significant Improvements at BCLC in Past Year (Coded Verbatims)



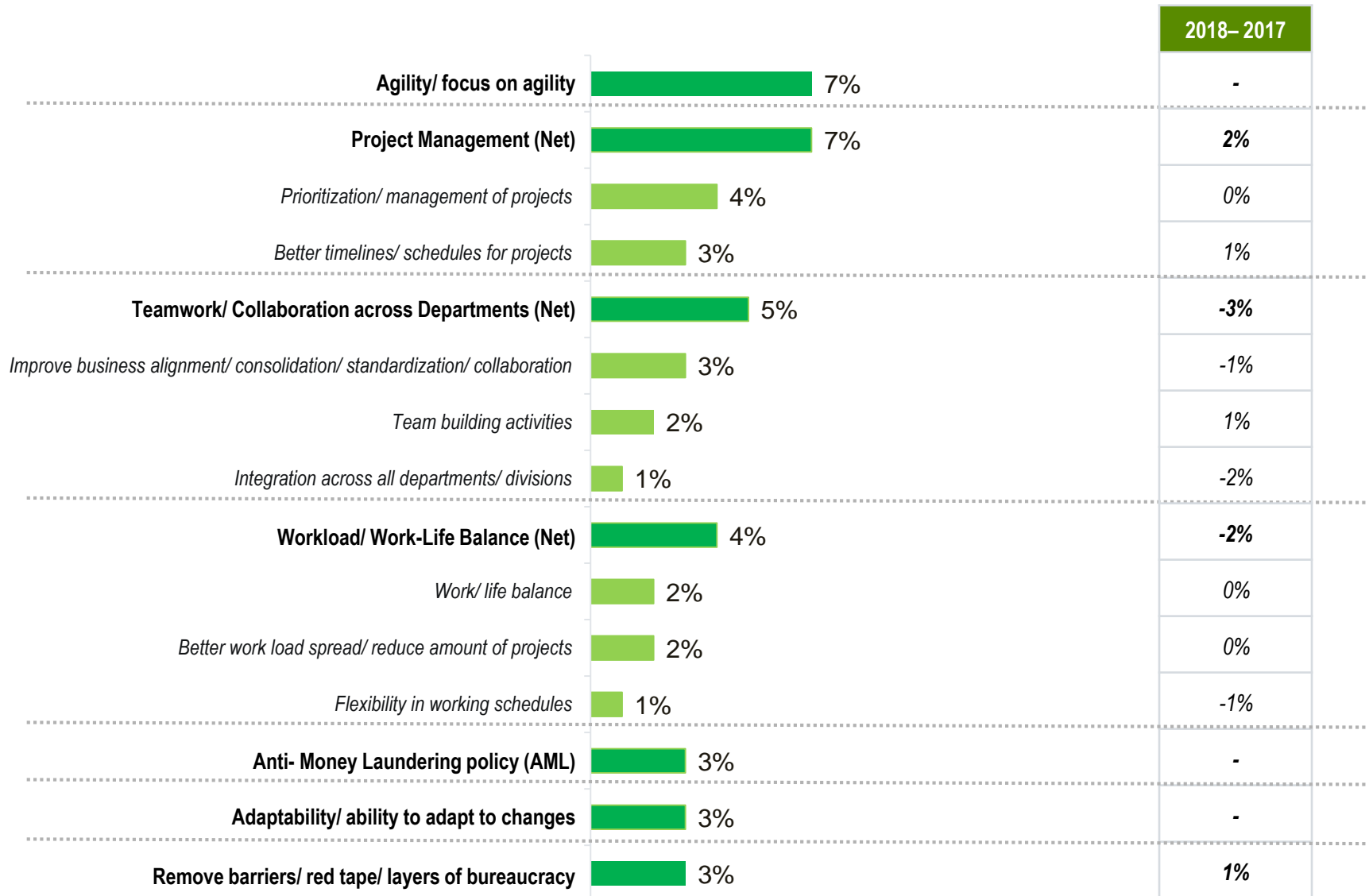
Significant Improvements at BCLC in Past Year (Coded Verbatims)



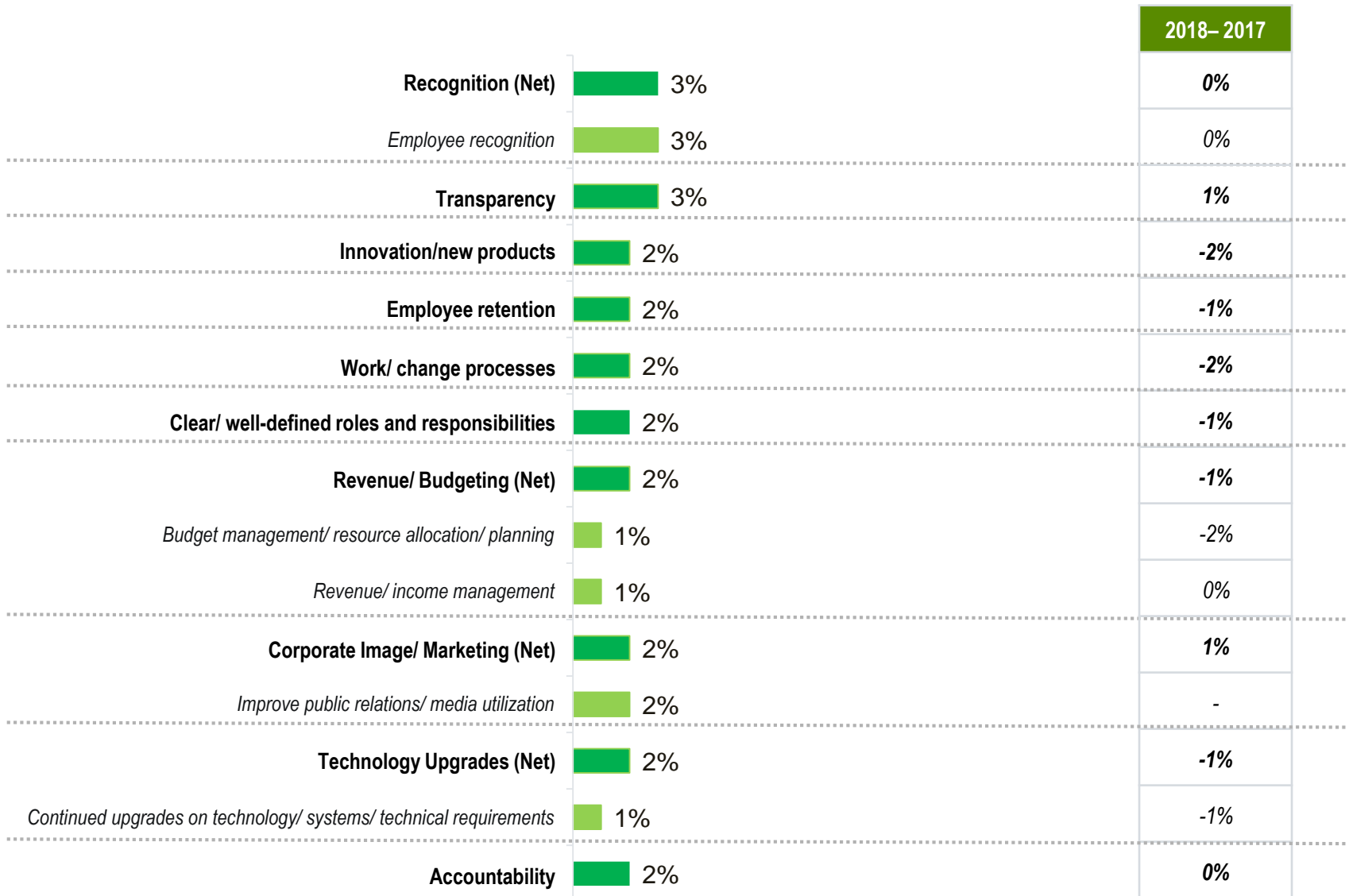
Priority Areas for Improvement Over the Next Year (Coded Verbatims)



Priority Areas for Improvement Over the Next Year (Coded Verbatims)



Priority Areas for Improvement Over the Next Year (Coded Verbatims)



Priority Areas for Improvement Over the Next Year (Coded Verbatims)

