

Your Voice 2018, BCLC's Employee Survey Comprehensive Report





Contents





Training & On-Boarding

bele playing it right

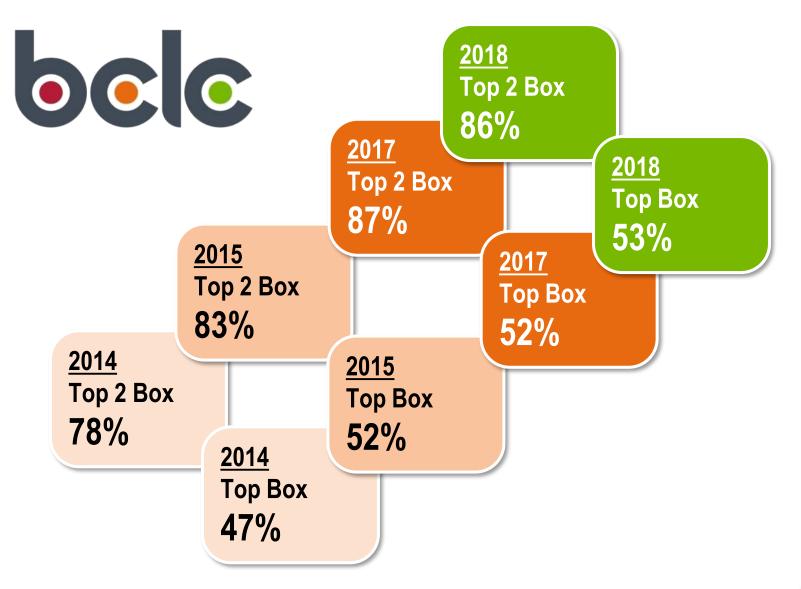
- 2018 was the ninth year of conducting Your Voice, the employee engagement survey for ocice.
- All employees were invited to participate with the following exceptions:
 - Students/Co-ops
 - Anyone on LTD; however, employees on maternity leaves/STDs included
 - New employees: up to 30 days of launch 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





DK Strongly disagree	Somewhat disagree	Neither nor	Somewhat agree	Strongly agree

	2018 n=752	6 14	4	41		35	76
BCLC inspires me to do my	2017 n=787	7 1	5	44		32	76 🛧
best work	2015 n=726	4 10	19		39	29	68 🛧
	2014 n=649	7 14	2 0		35	23 🔶	58 🖖
	2018 n=752	4 9	32			51	83
l am motivated to go beyond what is required in	2017 n=787	7 9	32	2		50	82 🛧
my role to help BCLC succeed	2015	4 9	10	30		47 🛧	77
Succeeu	2014 n=649	71 9	11	32		41	73 🖖
lf asked, I would assure	2018 n=752	14			84		98
friends and relatives that	2017	13			85		98 🛧
they can have trust and confidence in the games	2015	15			81		96
offered by BCLC	2014	<mark>3</mark> 15			81		96
	2018 n=752	7 🐴	28			62	90
BCLC consistently conducts business in a fair,	2017	4	30			63	93
honest and trustworthy	2015	5	29			63 🛧	92个
manner	2014 n=649	7	30			58 🔶	87



Top2

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

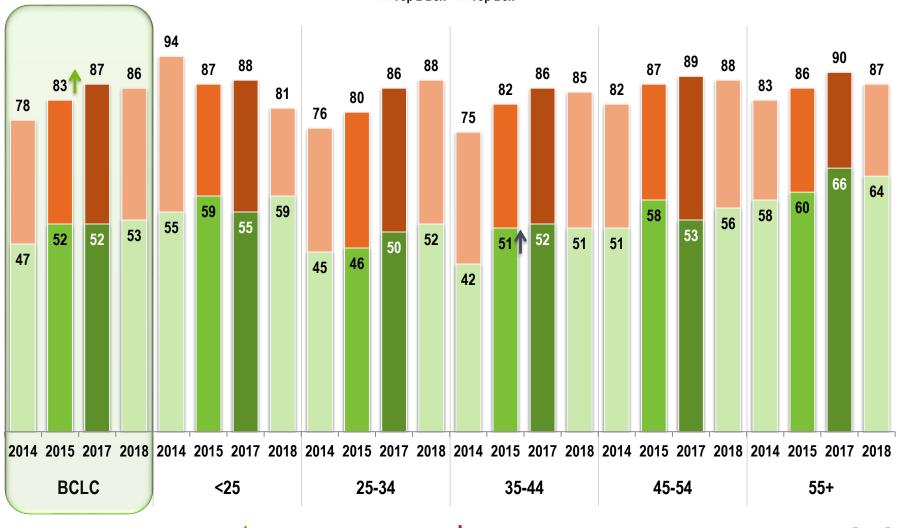
Top2

playing it right

35 🗸 n=752 **BCLC** continuously n=787 85 个 innovates to provide players with an outstanding gaming experience n=726 37 🗸 n=649 n=752 41 1 The right conditions are in 79 🕇 n=787 place at BCLC for me to take n=726 72 个 full responsibility in my job n=649 n=752 46 🗸 I understand how my role n=787 supports BCLC's strategy* 90 个 n=726 n=649 n=752 94 个 The way BCLC operates is in n=787 alignment with its values 89 🔶 n=726 n=649 Significant decrease from last year Significant increase from last year

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

Employee Engagement Index by Age

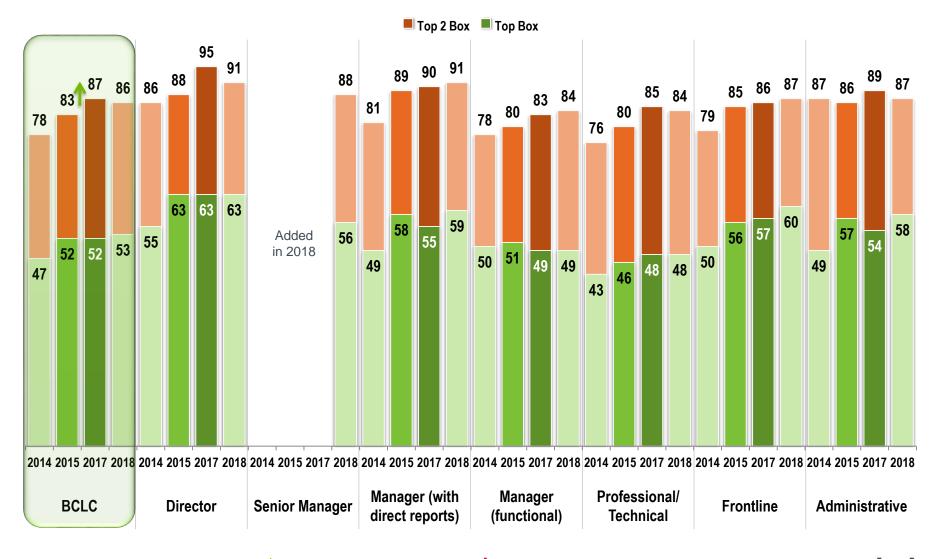


Top 2 Box
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Employee Engagement Index by Role





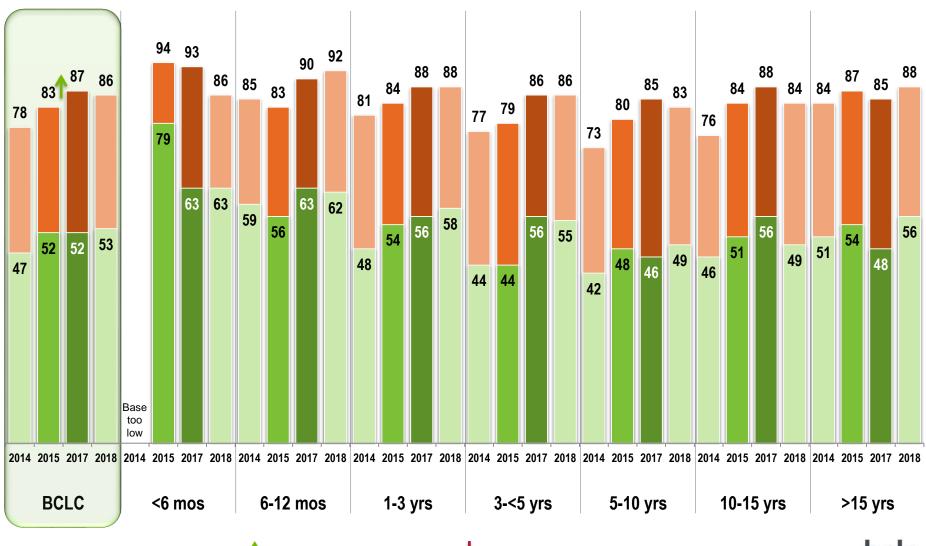
Employee Engagement Index by Location

59 个 BCLC **Field/ Remote** Vancouver Kamloops

playing it righ

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Employee Engagement Index by Tenure with the Organization



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Self-Reported Improvements & Priorities





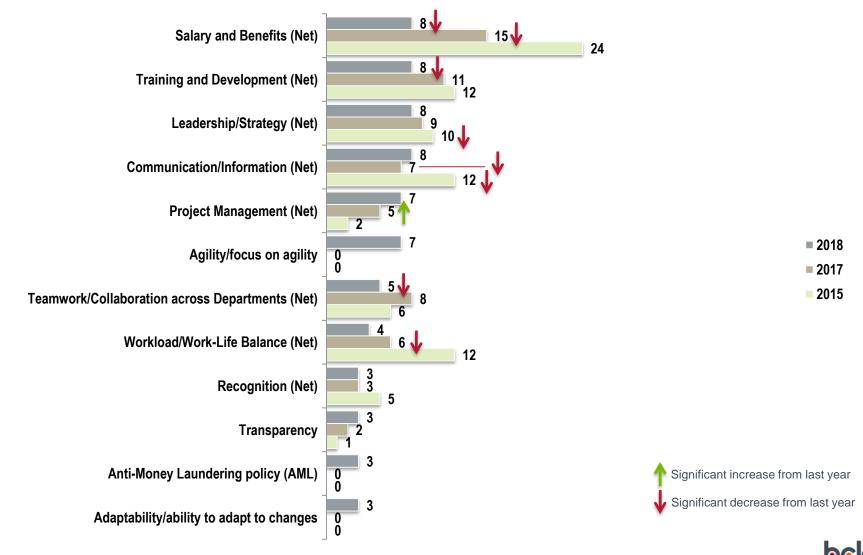
Significant Improvements at BCLC in Past Year – Top 12



Q32. Finally, what are two things that have improved significantly at BCLC in the past year? (2015 n=495, 2017 n=787)

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

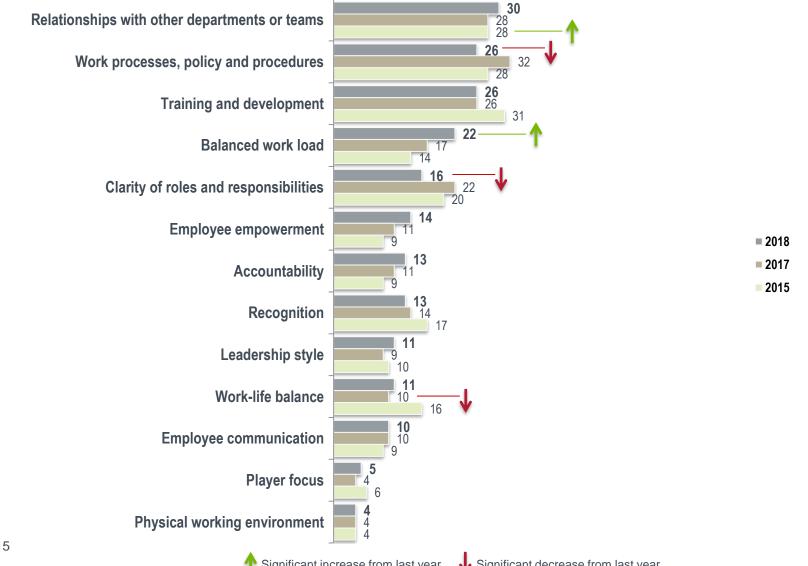
Top 12 areas for Improvements Over Next Year (%)



Q33. And what are two things that are priority areas for improvement at BCLC over the next year? (2015 n=495, 2017 n=787)

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





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%



	% Change from 2017-	% Change from 2015-	% Change 2014 -				
Statement	2018	2017	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%



	% Change from 2017-	% Change from 2015-	% Change 2014 -				
Statement	2018	2017	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%



	% Change from 2017-	% Change from 2015-	% Change 2014 -				
Statement	2018	2017	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%



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	% Chang e 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)

Statemant	% Change from 2017- 2018	% Change from 2015- 2017	% Chang e 2014	2019	2017	2015	2014
Statement I feel that my overall compensation package (pay, bonus and benefits) is comparable with people doing a similar job within BCLC.	2018 2.3%	2017 2.6%	- 2015 2.2%	2018 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	% Chang e 2015- 2017	% Chang e 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	% Chang e 2015- 2017	% Chang e 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	% Chang e 2015- 2017	% Chang e 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

- 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

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

Average Impact

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

Low Impact

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



BCLC Factors Ranking – High Impact

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.



High Impact

BCLC Factors Ranking – High Impact

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



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BCLC Factors Ranking – 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.



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BCLC Factors Ranking – Average Impact

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



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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

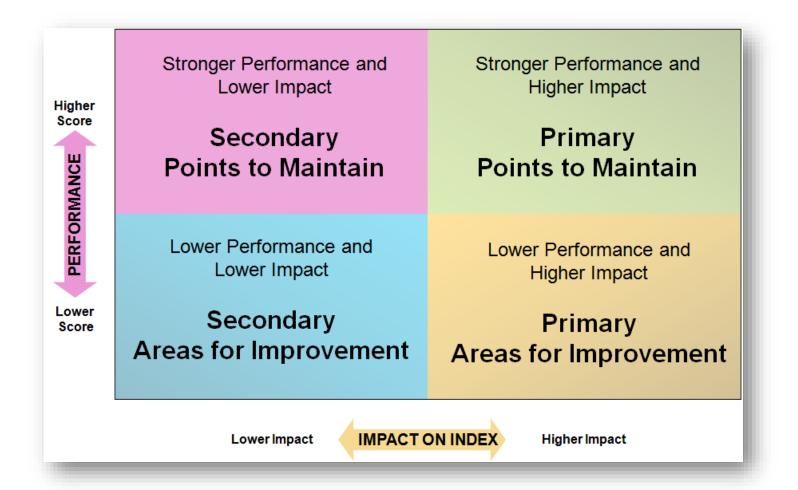
Priority Matrix

- 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.
- The Priority Matrix is a tool designed to help derive opportunities for 0 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.
- The axes and scales are adjusted to best display relative association and 0 performance. Therefore, factors falling into the lower quadrants are not to be disregarded but interpreted relatively.



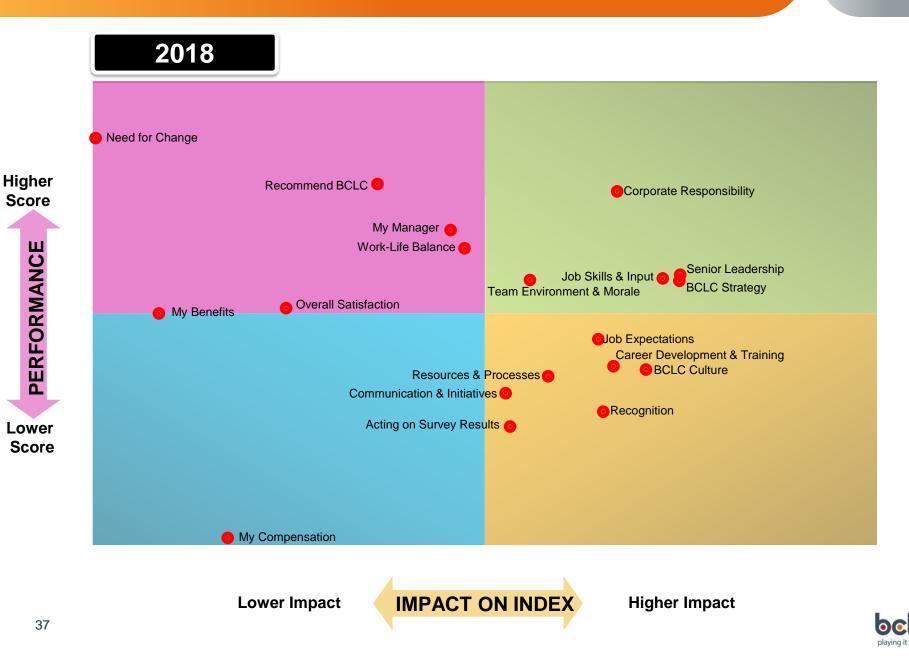
Understanding Priority Matrix

• 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).

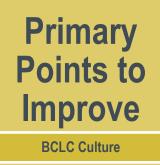




Priority Matrix for BCLC



Areas For Focus



Career Development & Training

Recognition

Job Expectations

Resources & Processes

Acting on Survey Results

Communication & Initiatives

Primary Points to Maintain



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 DATA BASE

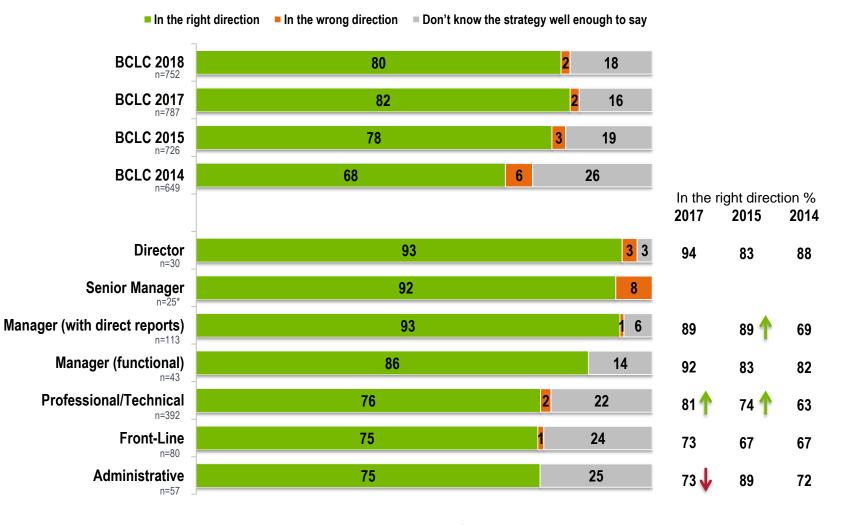
• RED = Representative Employee Data

- **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 ... (%)





Corporate Dimensions

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



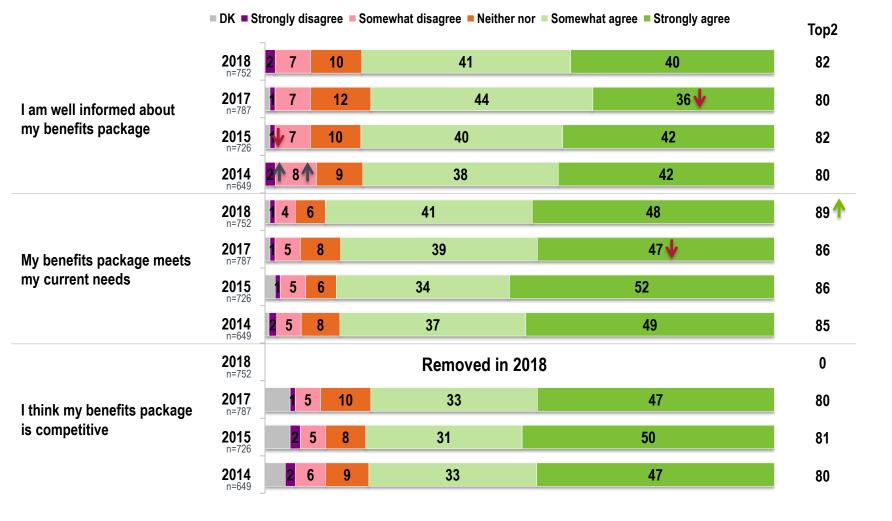
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

42



Benefits Package

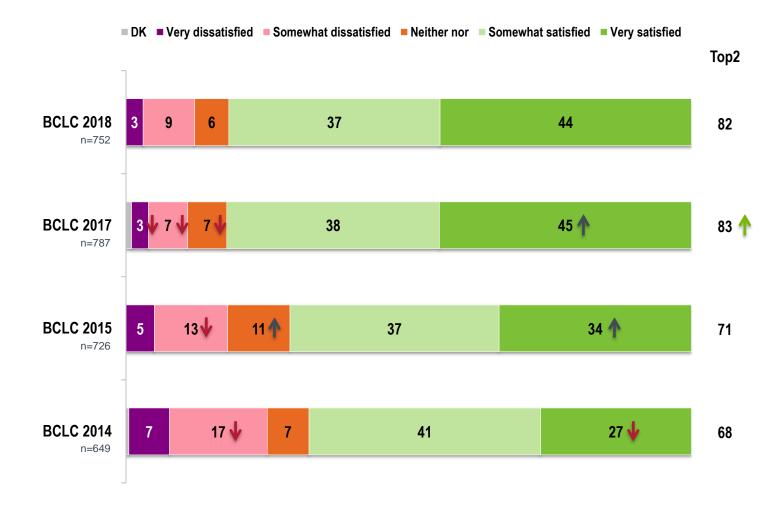
Please rate your agreement with the statements below ... (%)





Overall Satisfaction

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

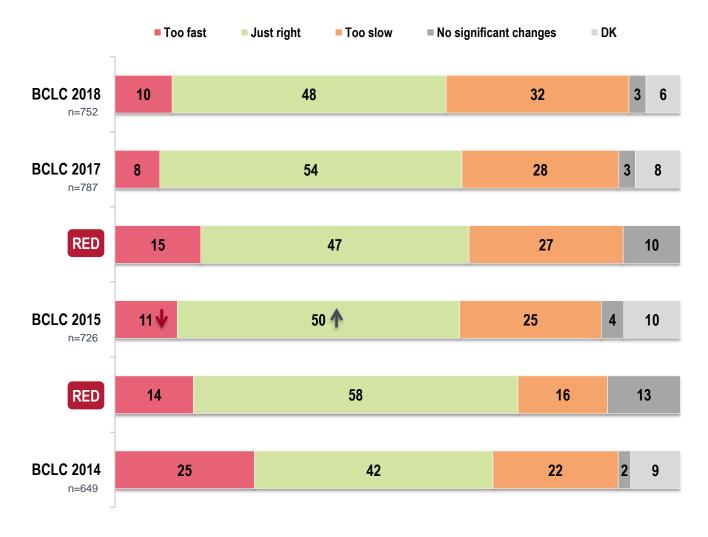




44

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? (%)

		Too fast	Just right	Too slow	No signif	icant changes	DK	
	ⁿ⁼³⁰ 2018	3	47			43		
Director	2017	9	44			44		3
	2015	7	55			28		7
	2014	24		28		44		4
Senior Manager	n=25* 2018	4 20			76			
	2017							
	2015							
	2014							
Manager (direct reports)	n=113 2018	12	47			38		2
	2017	10				39		2
	2015	15		52			28	2
	2014	23		42		27		
	n=43 2018	2	42		4	7		5
Manager (functional)	2017	6	39			53		_
• • •	2015	5	53			35		
	2014 n=392 2018	12	39	19		39 28		5
	2017	13 9	53			20	3)
Professional/ Technical	2017	11	45	AL		20	5	
	2013	27	45	40		21 22	2	
Front-line	n=80 2018	5	60	40		21	1	
	2017	6 🖤		65		15	4	
	2015		15 55			11 5		
	2014	21		50		11	2	
	n=57 2018	7	56	•••		21		
A	2017	3	63			19	2	
Administrative	2015	6	61	1		20	2	
	2014	30			52		11	



Satisfaction with Flexibility of Work Schedule

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

	n=752	2018	248		25			61		^{lished} Top2 86
	n=787	2010		.	25 28			57	/	85 1
Overall	n=726	2017				27			53	80
	n=649	2013		0		27				77
	n=30		3 3	20		21		73	50	93
	11 00	2010	00	20				72		100
Director		2017	333	20	_	52		124	38	90
		2013	4		44	JZ			52	96
	n=25*		4 8		28			60	52	88
	11-25	2010	4 0		20			00		00
Senior Manager		2017	_							
		2013	_							
	n=113		2 4	9	0			64		94
	11 110	2010		ು	32					90
Manager (direct reports)		2017				58				
2		2013	13 8	6	24			64	51	88
	n=43		22	0	40	0		50	-	95
	11 10	2010	3 6		40 36					92
Manager (functional)		2017	33				_	56 58		
		2013			38					96 91
	n=392		3 6		33			58		85
	11-002	2010		3	24			61	7	85
Professional/ Technical		2017	575	ŏ	28	00	_	57		80
		2013	0 0	7 4		26			54	74
Front-line	n=80			7 1	4.5	24			50	74
	11-00	2010		12	15	19			51	76
		2017		13	44	29	20		47	67
		2015		15	11	2	29		38	62
	n=57			12		3	27	<u></u>	35	86
	11-37		249		18			68		78
		2017		15	17			61		81
Administrative		2015		0						
Administrative		2015 2014	3 8	8	22 20			59 61		81

Care for Employee Well-Being

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

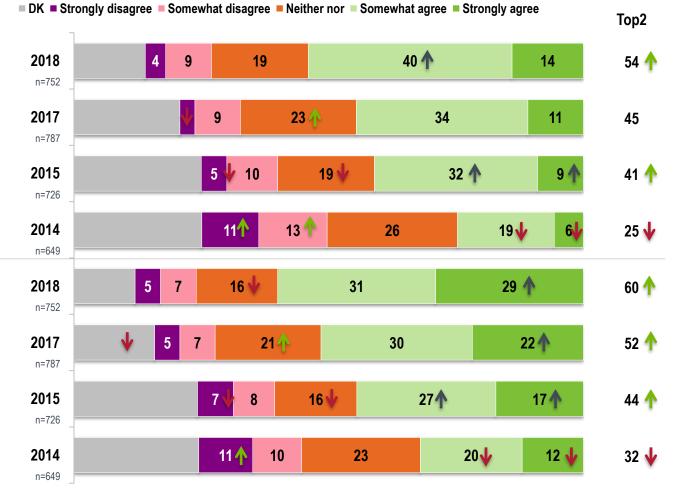
DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

37		47		84
41/	1	4	2	83
	35		34	69
20	3	32 🕊 📃	23 🖤	55
-		63		96
1		59		90
41		48		89 68
	36	64	32	92
		64		92
36		55		91
40		51		91 91
	38		11	79
14	35		24	59
	40	_	37	77
	56		22	78
25	38		23	61
	42		27	70
4	40		40	79
	41		37 🛧	78
21	36		28	64
21	21	30 🗡	21	51
34		54		88
34		47		81
	31		38	69
23	33		24	57
28		54		83
49 4			39	88
	31	44		75
22	22 2	22	28	50
	last year	22 2	22 22 22	22 22 28

playing it right

Survey Follow Up

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



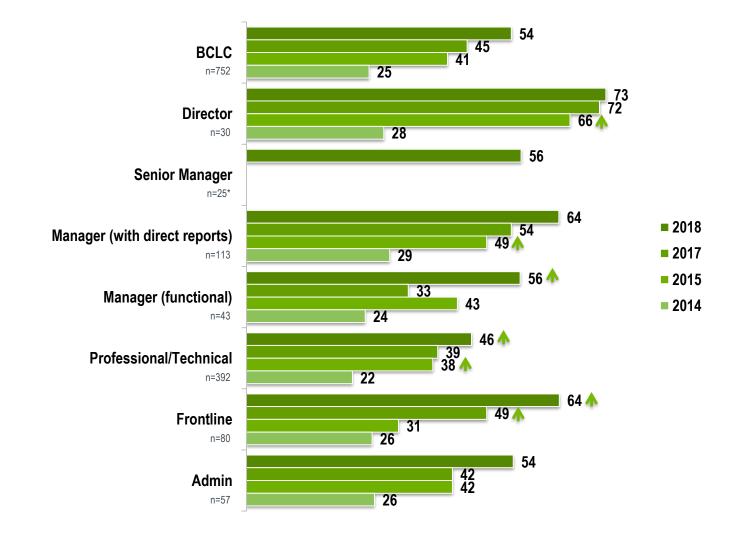
BCLC has made progress on issues raised in last year's employee survey

My department took action based on the employee survey results



Survey Follow Up at Corporate Level

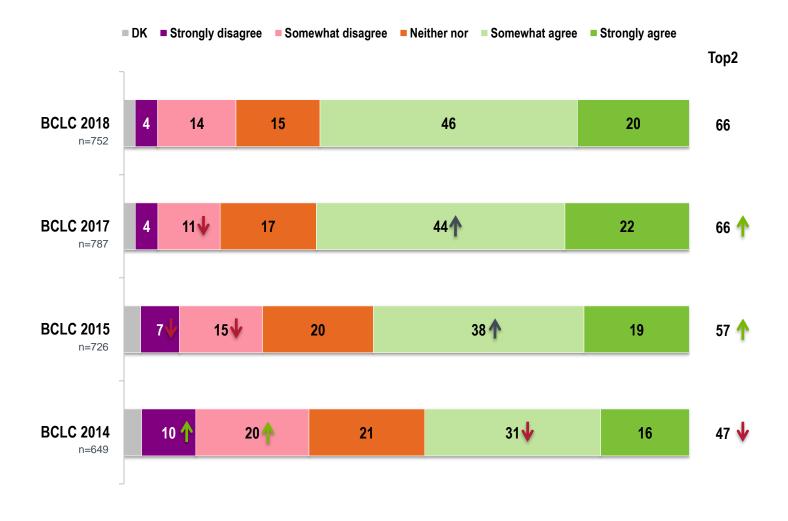
BCLC has made progress on issues raised in last year's employee survey (Top 2 Box %)





Development

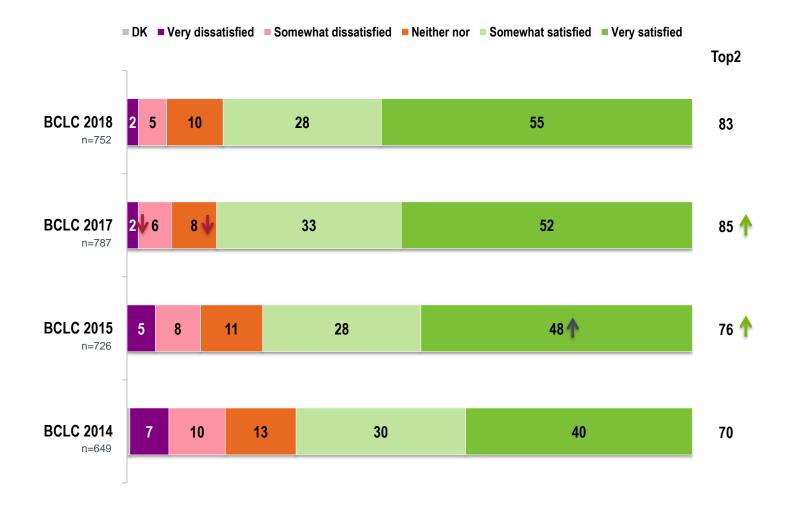
BCLC is good at developing employees to their utmost potential (%)





Work-Life Balance

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





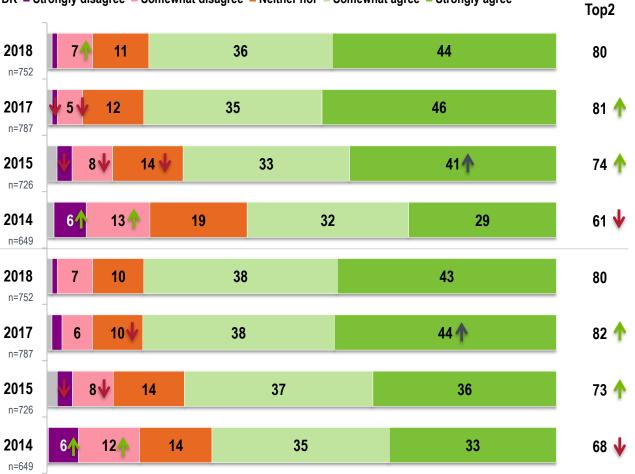
Perceptions of the Leadership Team

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





Significant increase from last year 🛛 🚽 Significant decrease from last year

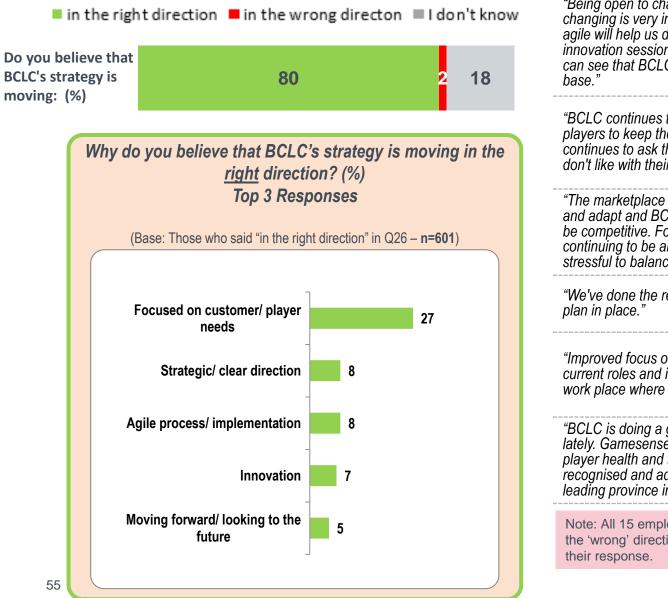
Would Recommend

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





Why BCLC is Moving in the <u>Right</u> Direction?



Q26B. Why do you believe that BCLC's strategy is moving in the right direction?

"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."

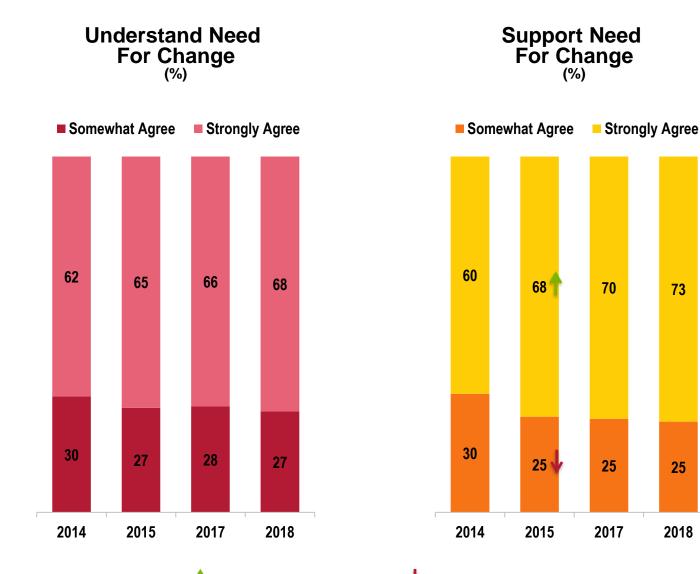
"Improved focus on developing and supporting employees in their current roles and is dedicated to becoming an agile, automated work place where work doesn't drag on for weeks and months."

"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.



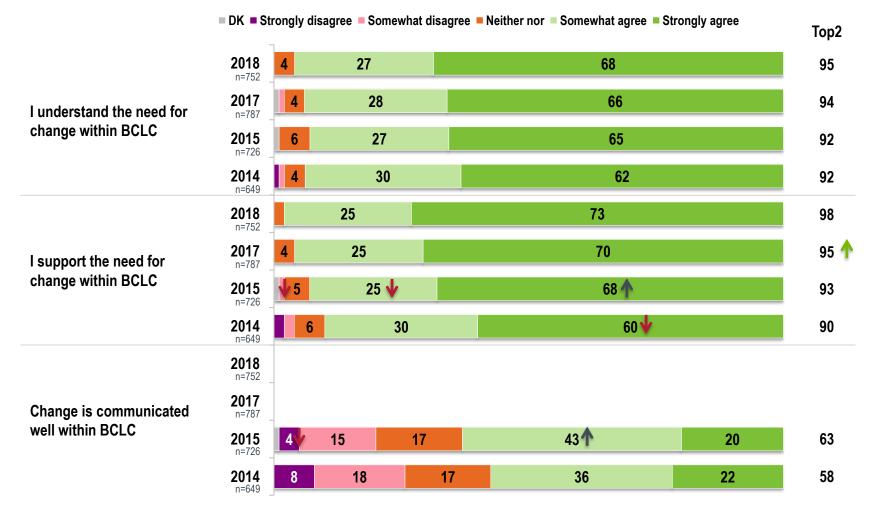
Change Measures





Need for Change – Understanding and Support

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





BCLC Agility Index



Agility Index: Total BCLC

	Overa Agilit Scor	43 43	% ■ Agile	2017: 469	% Agile	
Rigid	2018 35%	35%		30%	Agile	
	2017 32%			32%		
Bureaucratic	54	%	34%	13%	Not Bureaucratic	
	51%	, D	33%	16%		
Not Entrepreneurial	35%	37%		29%	Entrepreneurial	
	37%	37%		27%		
Risk Avoiding	47%		36%	18%	Risk-taking	
	44%		36%	20%		
Directive	31%	44%		25%	Participative	
	28%	43%		29%		
Secretive	29%	37%	;	34%	Open	
	27%	35%	38	3%		
Adverse to Change	23%	33%	44%	Open to Change		
	21%	33%	46%			
59	Not Agile	Equally Agile / Not Ag	ile Agile		be	
	Significant inc	rease from last year 🛛 🚽 Signifi	cant decrease from last	/ear	playing	

The Employee Experience Index

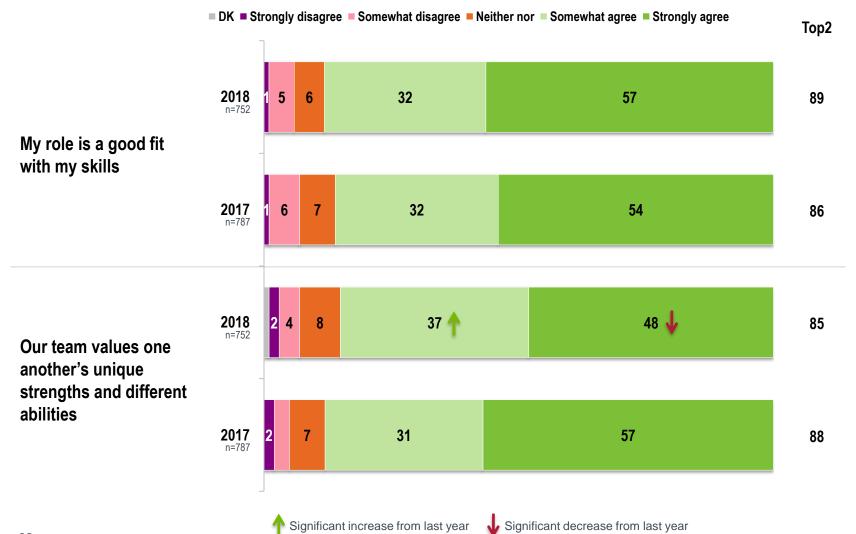


Feedback and Recognition



playing it righ

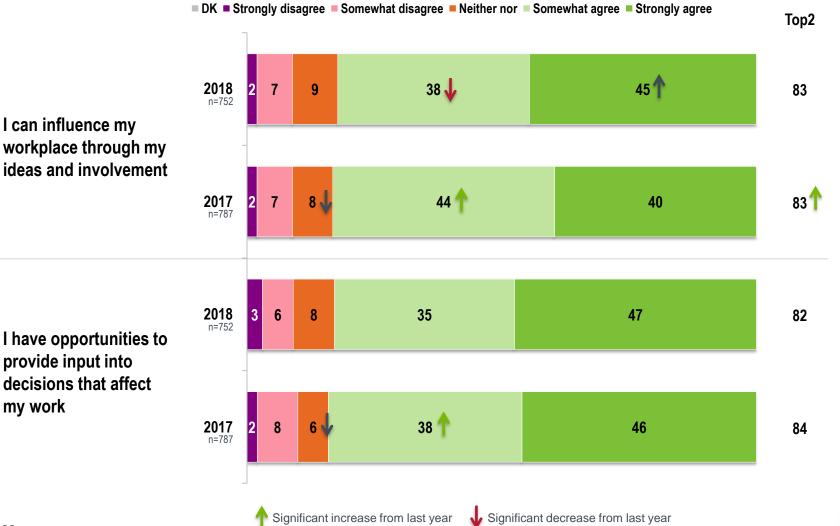
Skill Fit and Valuing Diversity



playing it righ

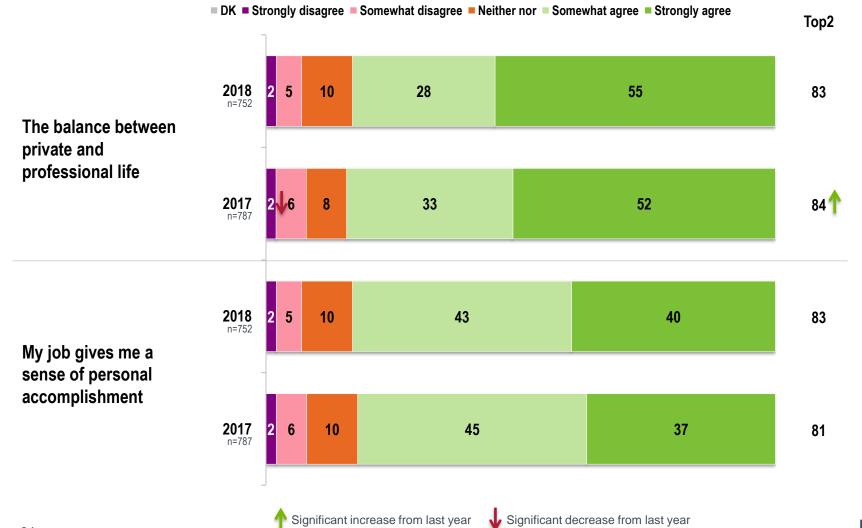
62

Employee influence



plaving it righ

Work-Life balance and Personal Accomplishment

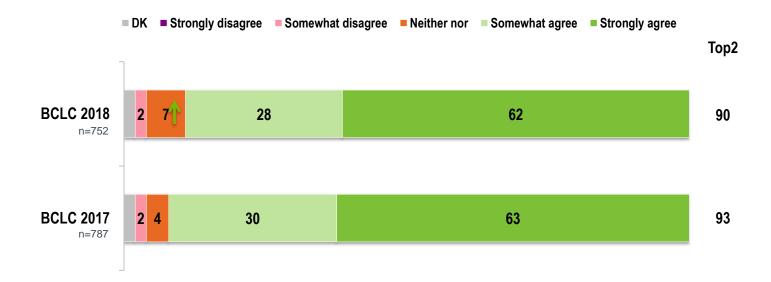


plaving it

64

Business Conducted Fairly

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

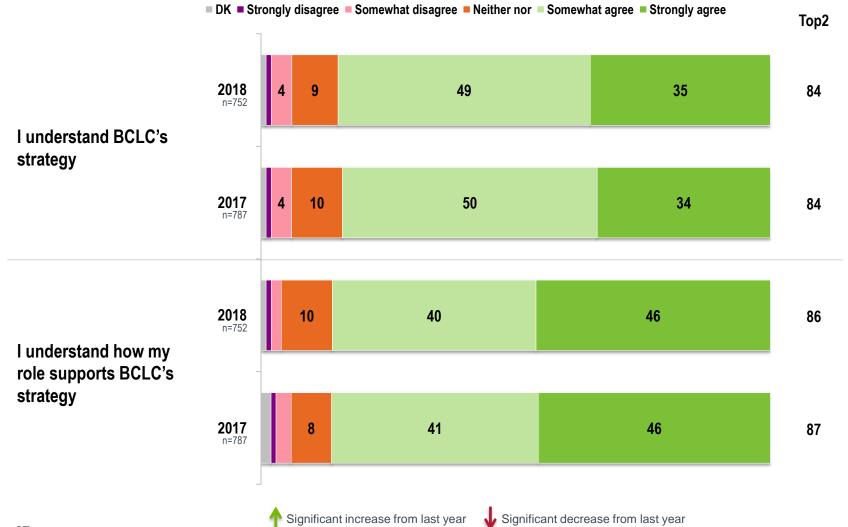




BCLC Strategic Alignment Index & Cultural Drivers

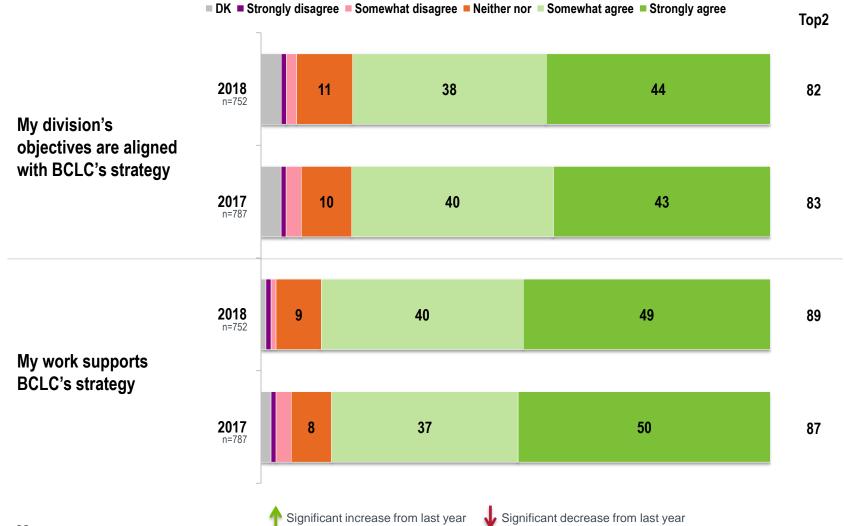


Understanding of BCLC's Strategy



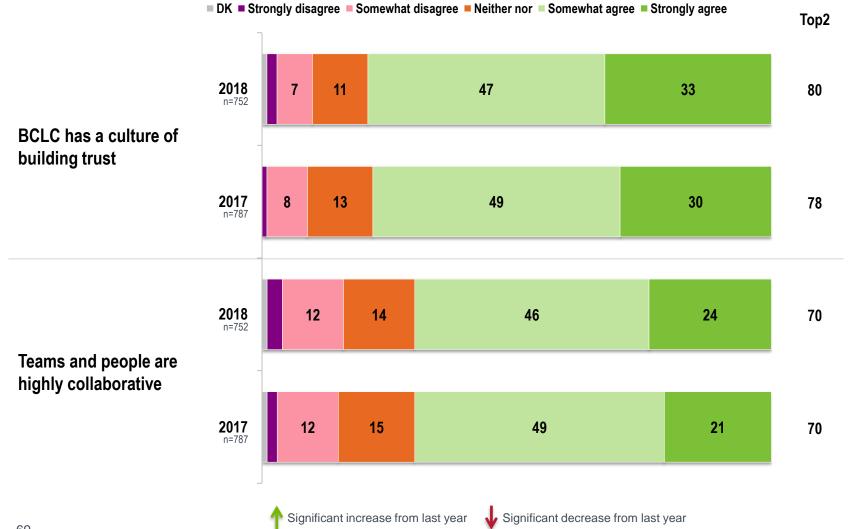
playing it righ

Alignment of BCLC's Strategy



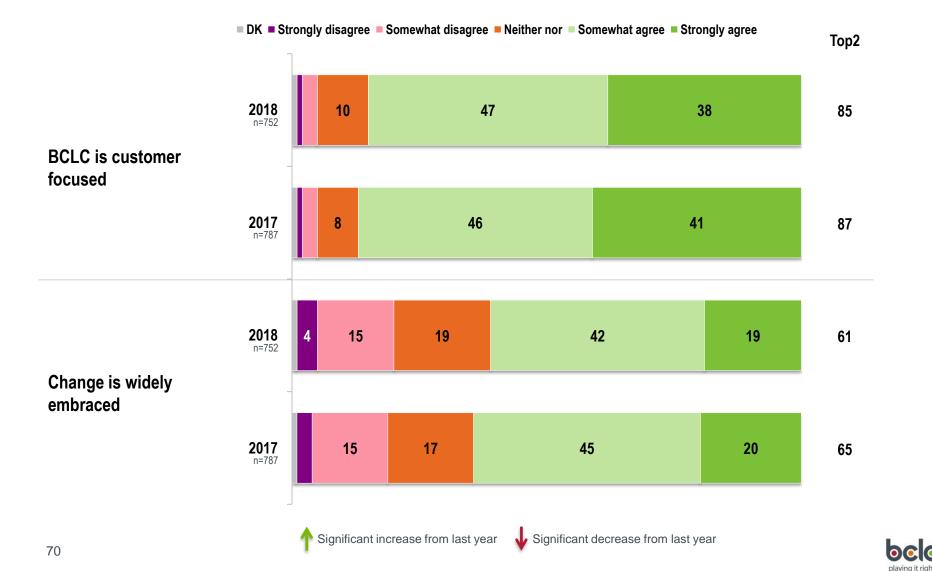
plaving it righ

Trust & Collaboration



plaving it righ

Customer Focus & Embracing Change



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



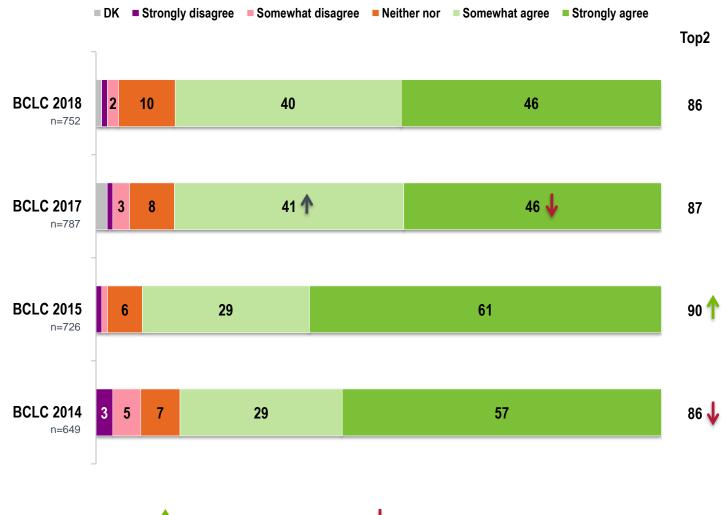


The Employee Experience



Role Supports Business Objectives

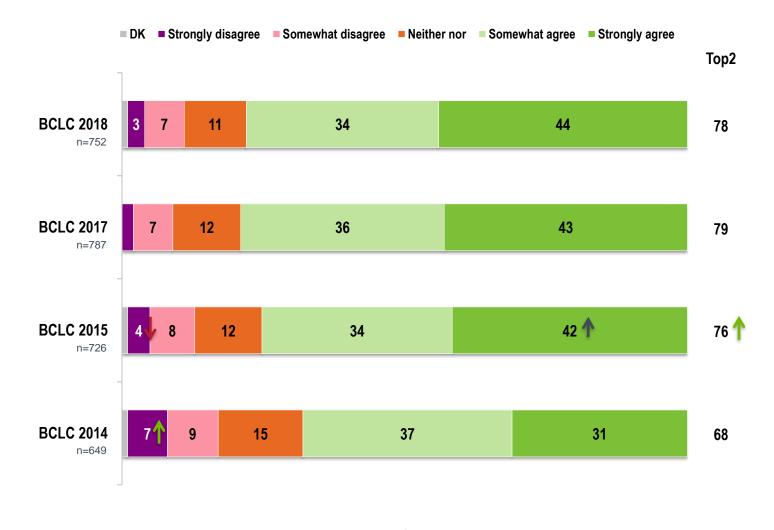
I understand how my role supports BCLC's strategy* (%)





Input in Goal Setting

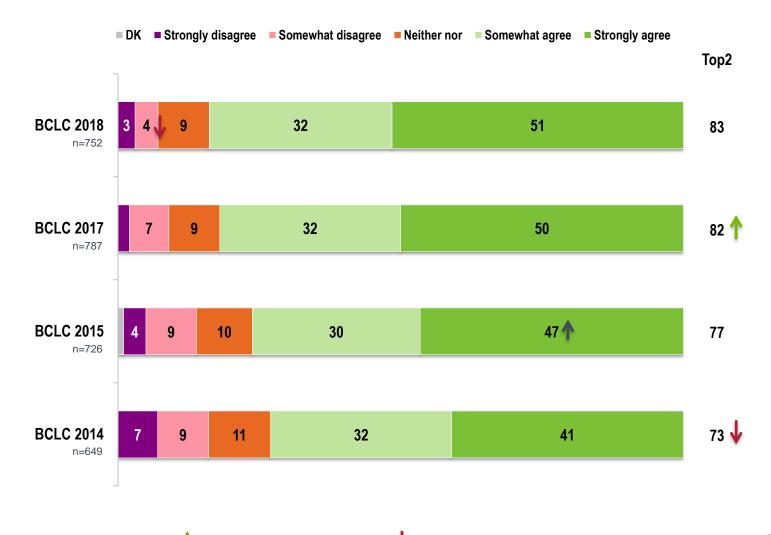
I have had sufficient input into determining the goals for my job (%)





Motivated to Exceed Requirements

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





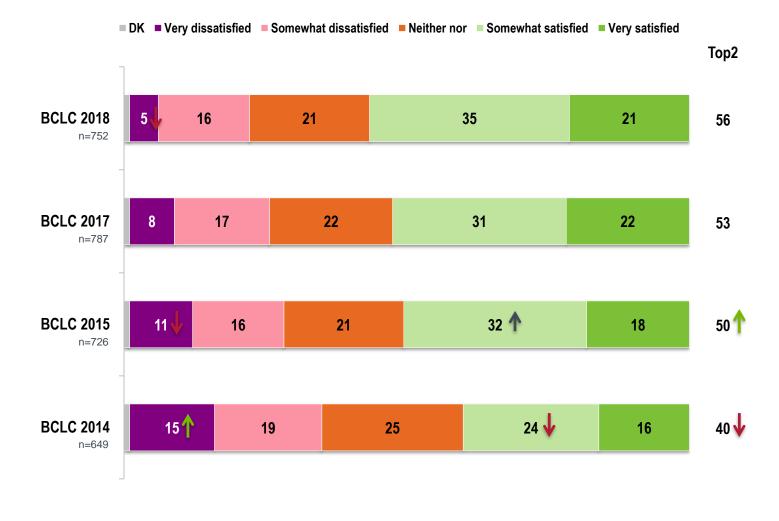
Opportunities for Training

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 (%)





playing it righ

The Work Environment



Department Objectives – Clear, Realistic, Consistent

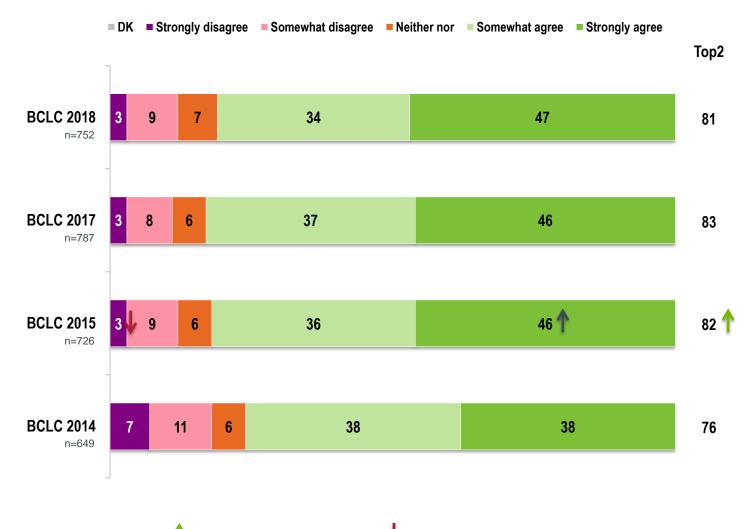
My department's objectives are ... (%)

DK = Strongly disagree = Somewhat disagree = Neither nor = Somewhat agree = Strongly agree						Top2
Clear	2018 n=752	7 8	36		47	
	2017 n=787	6 9	39		45	84
	2015 n=726	4 6 9	37		45 🛧	82 🛧
	2014 n=649	6 12 19	35		38 🔶	73 😾
Realistic	2018 n=752	7 13	40		37	77
	2017 n=787	6 12	41 🛧		39	80 🛧
	2015 n=726	▶ 8 ▶ 15	35		37	72 🛧
	2014 n=649	6 12	17	32	30	62
Aligned with BCLC's strategy*	2018 n=752	11	38		44	82
	2017 n=787	10	40		43	83
	2015 n=726	11	36		45 🛧	81 🛧
	2014 n=649	5 17	33		39	72



Good Communication

Communication is good within my team (%)





Resources

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



Significant increase from last year 🛛 🚽 Significant decrease from last year

Work Conditions

My work conditions allow me to perform effectively (%)



Significant increase from last year 🛛 🚽 Significant decrease from last year

Working Atmosphere

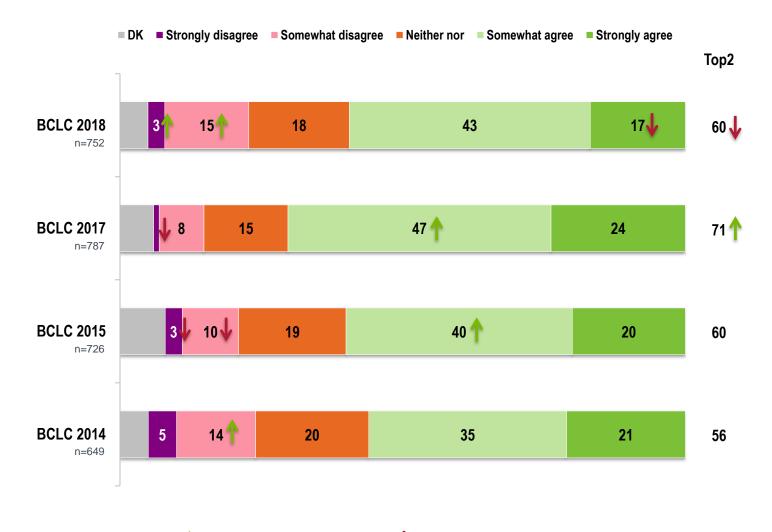
Please rate your satisfaction with the working atmosphere within the team (%)





Projects are Usually Completed

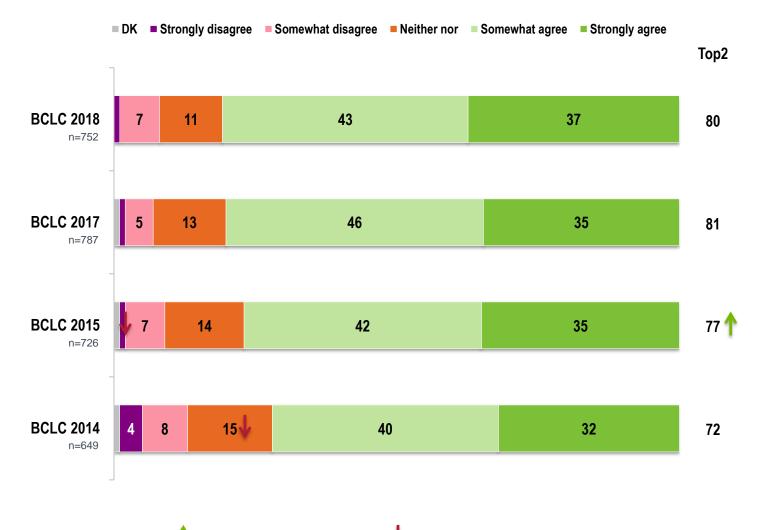
Projects and initiatives that are launched within BCLC usually get completed (%)





Communications Help Understand Objectives

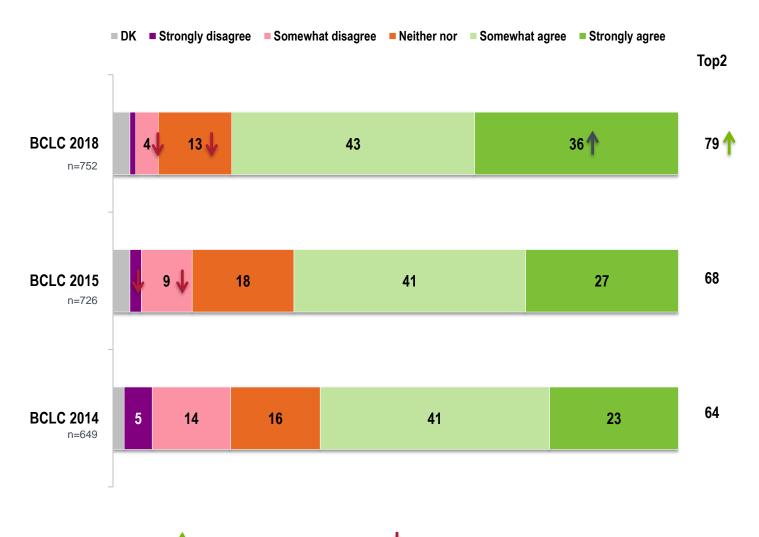
Official communications are effective in helping me better understand our business objectives (%)





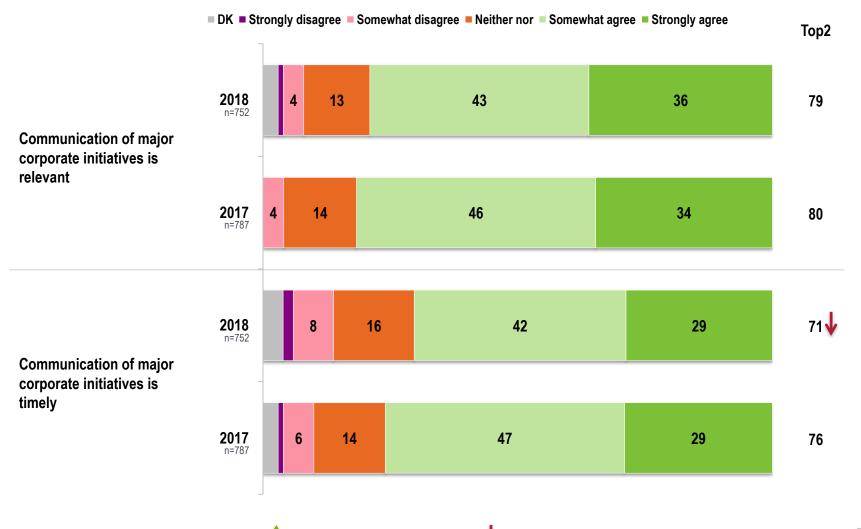
Communications are Timely and Relevant

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





Communications are Timely and Relevant



89

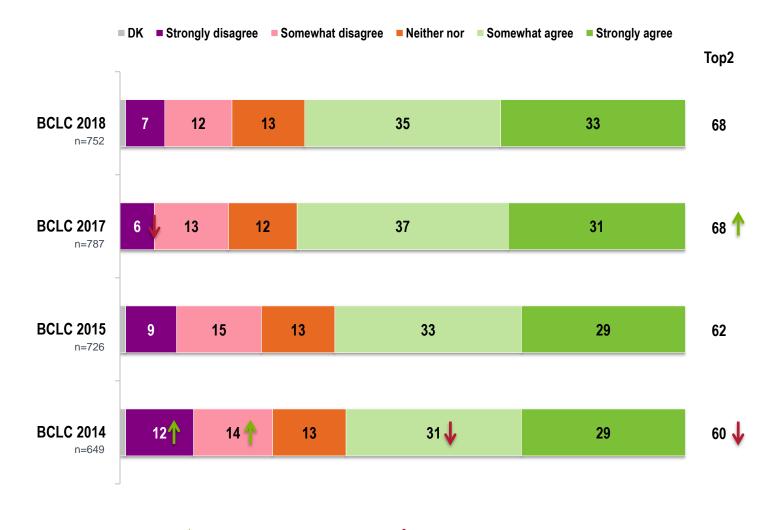


Recognition and Performance



Recognized Based on Performance

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





Perceiving Recognition

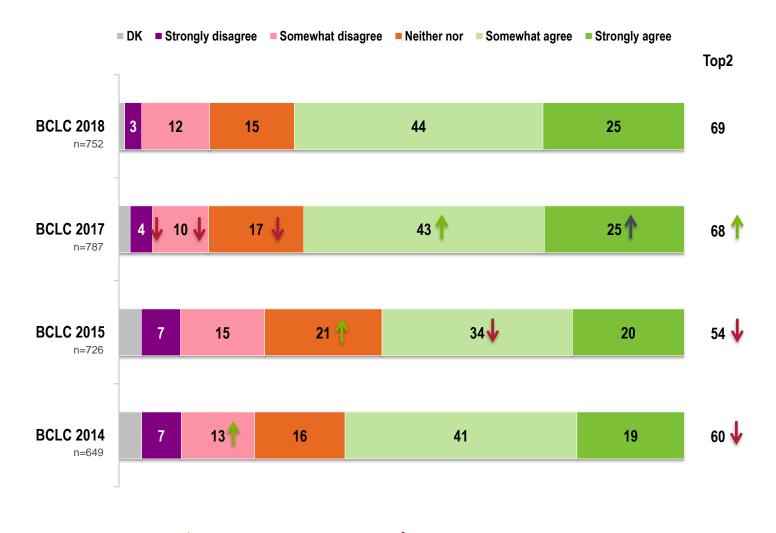
Recognition is given in a personal and meaningful way (%)





Reward Recognition

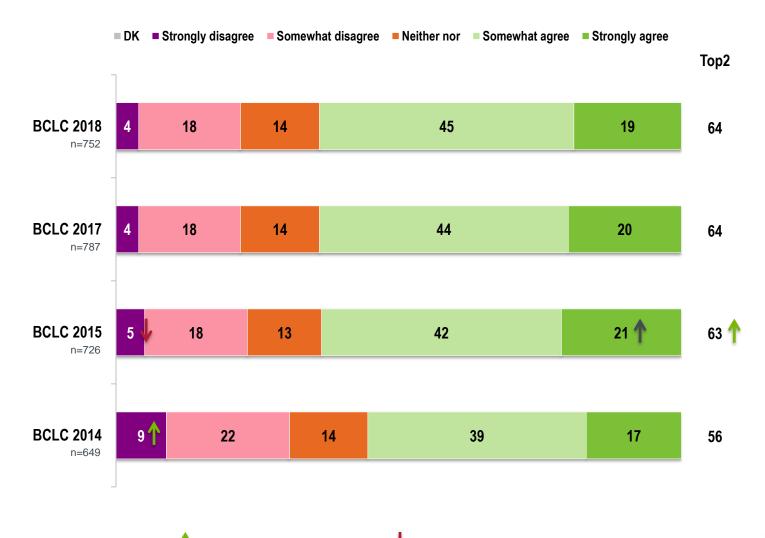
BCLC provides rewards to recognize various levels of achievement (%)





Perform Effectively

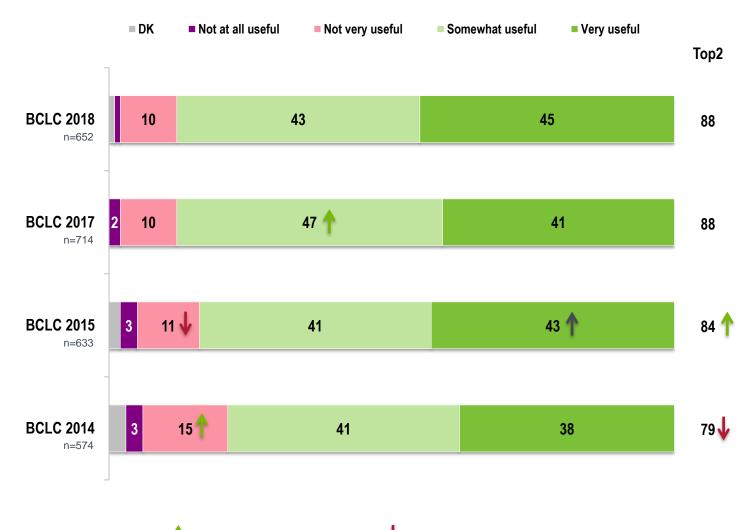
The work processes at BCLC allow me to perform effectively (%)





Improving Current Performance

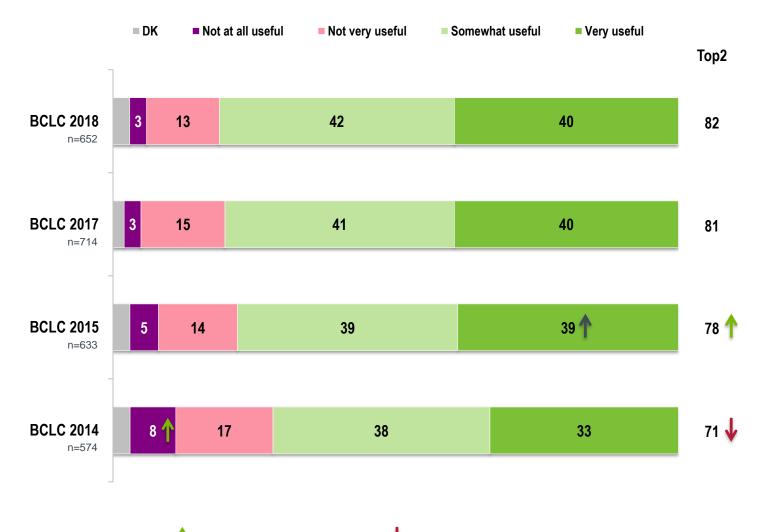
How useful was the performance discussion on identifying ways of improving your current performance? (%)





Identifying Development Opportunities

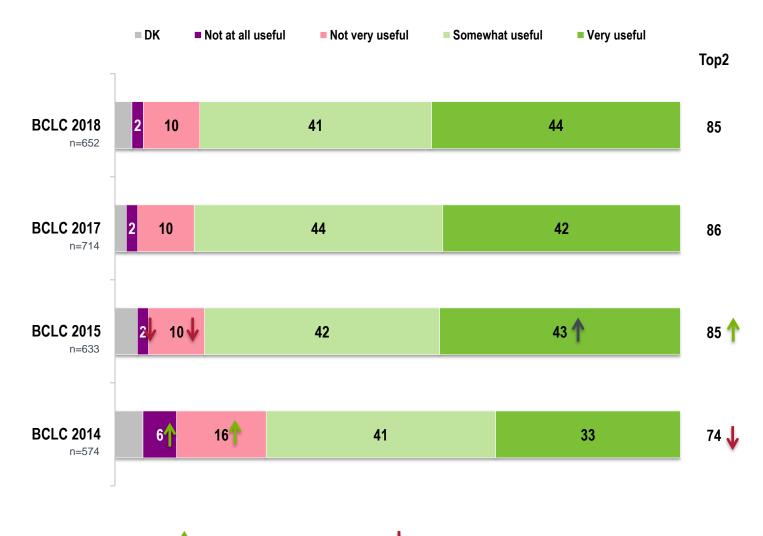
How useful was the performance discussion on identifying your future development opportunities? (%)





Setting Future Performance Expectations

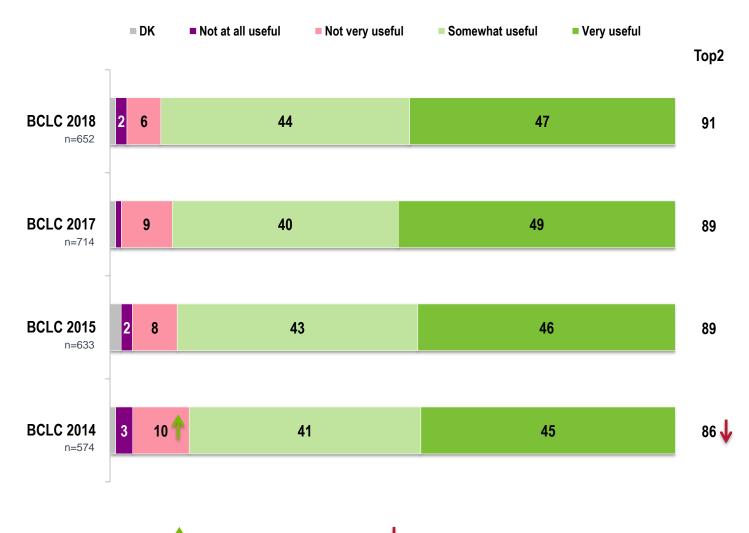
How useful was the performance discussion on setting performance expectations for the next year? (%)





Feedback on Performance

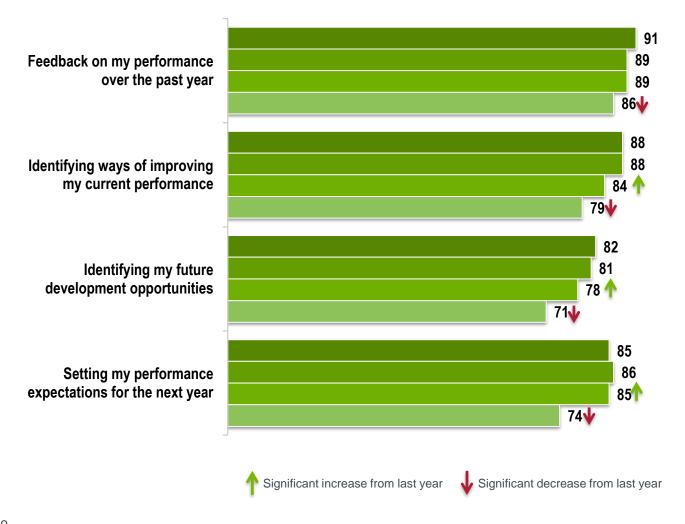
How useful was the performance discussion on your performance over the past year? (%)





Results If Employee Had Performance Review







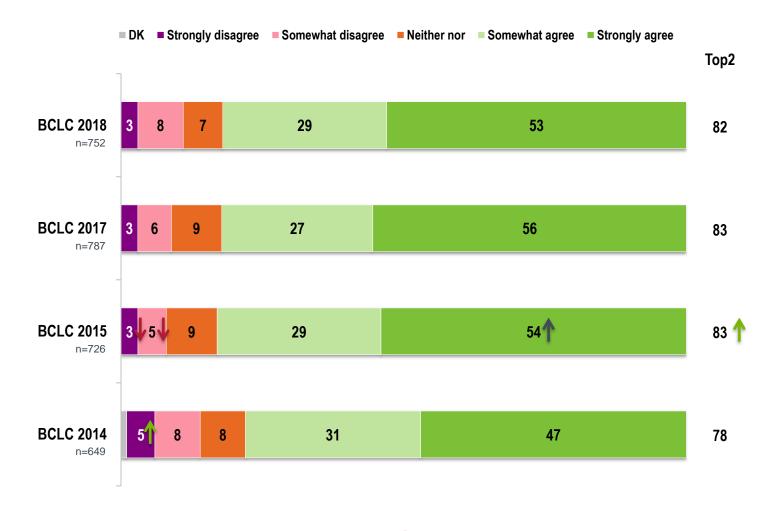
Base: Respondents who had a performance review in the past 12 months

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

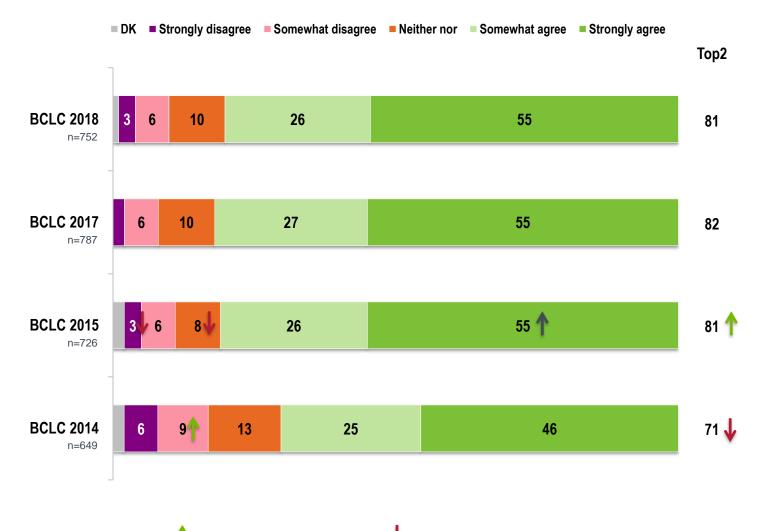
The person I report to promotes open and honest communication (%)





Leader Committed to Development

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





Leader Respectful

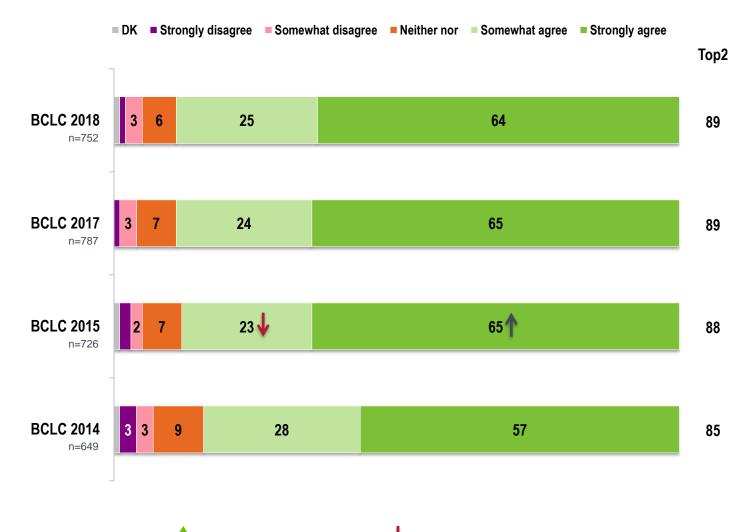
The person I report to treats me with respect (%)





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

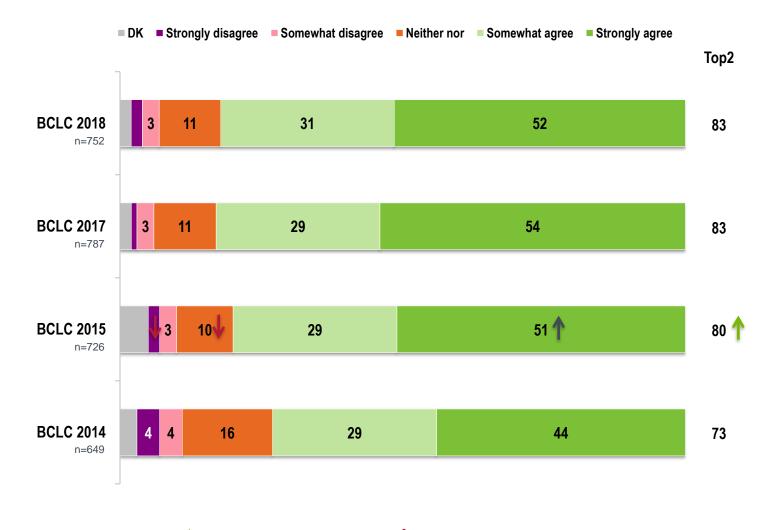
The person I report to encourages collaboration with other teams (%)





Leader Betters Customer Experience

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





Compensation and Benefits



Salary

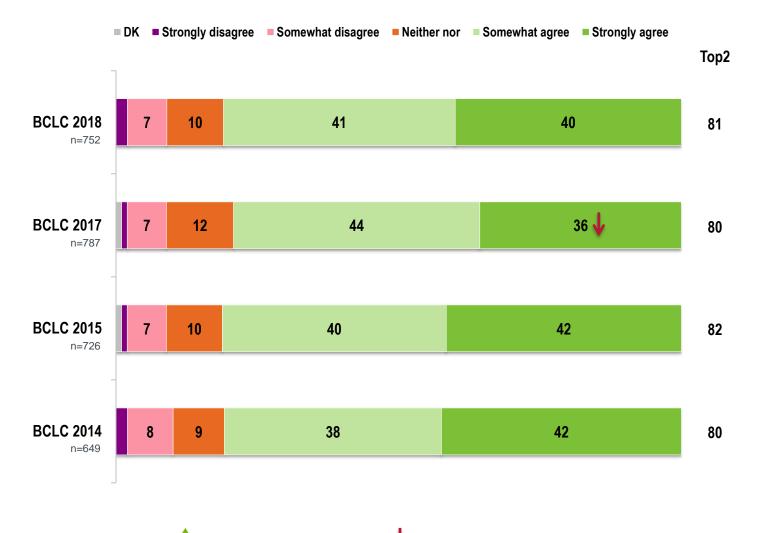
Please rate your satisfaction with the salary (%)





Well Informed About Benefits Package

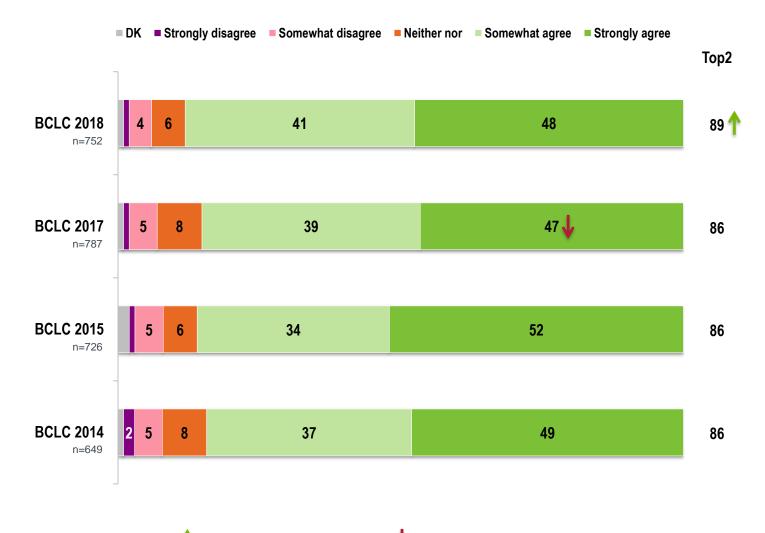
I am well informed about my benefits package (%)





Benefits Meet Current Needs

My benefits package meets my current needs (%)





Pension/Retirement Savings Program

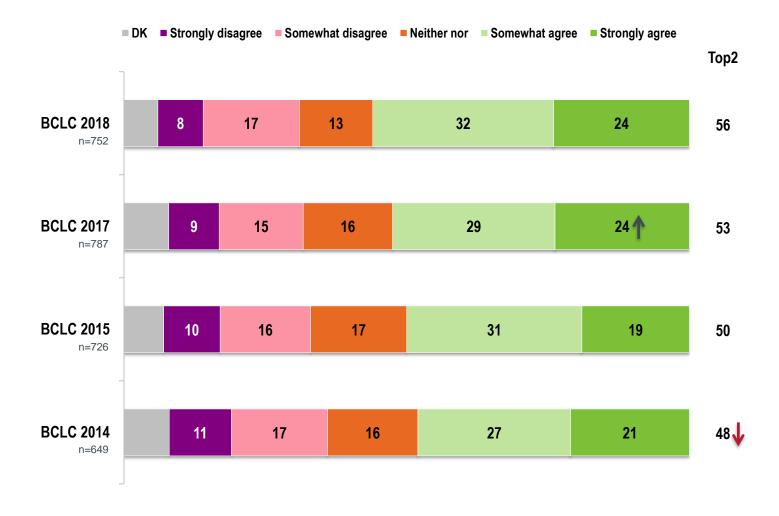
I am well informed about my pension/retirement savings program (%)





Comparable within BCLC

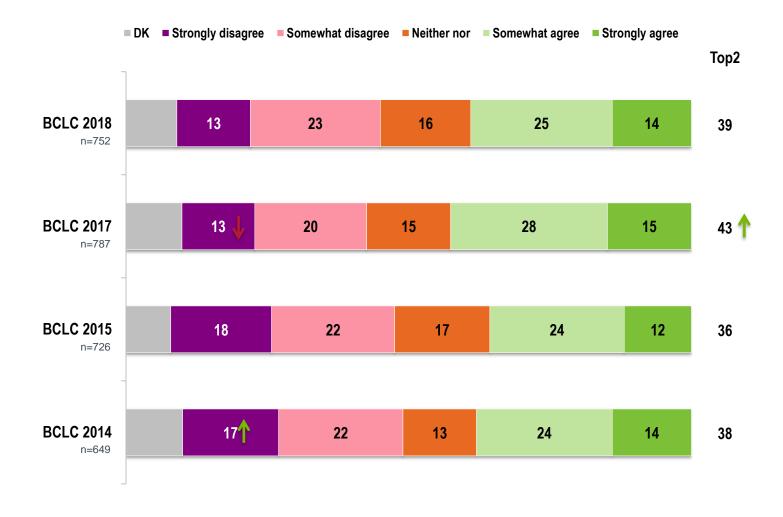
I feel that my overall compensation package is comparable with people doing a similar job within BCLC (%)





Comparable with Other Similar Organizations

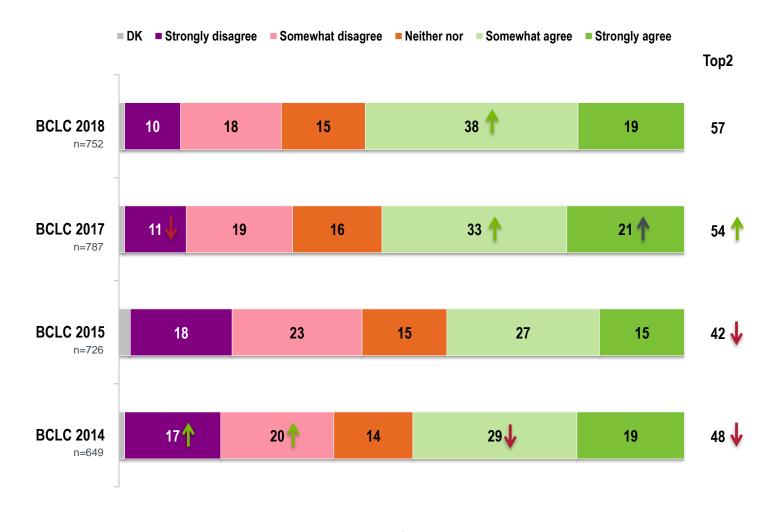
I feel that my overall compensation package (pay, bonus and benefits) is comparable with people doing a similar job with other similar organizations (%)





Reflect Performance

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





The Influence of BCLC



Inspirational

BCLC inspires me to do my best work (%)





Responsibility of Job

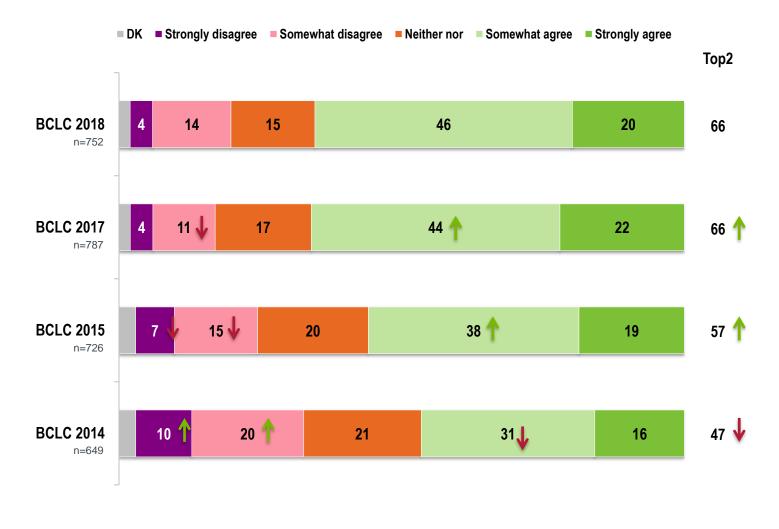
The right conditions are in place at BCLC for me to take full responsibility of my job (%)





Developing Employees

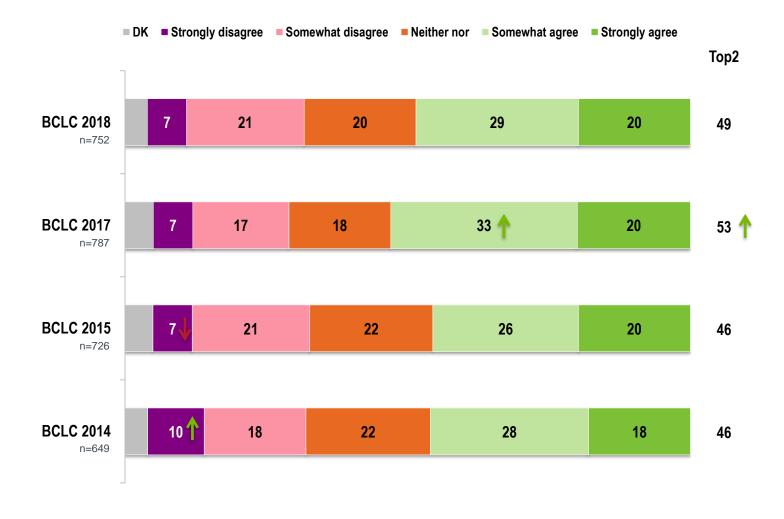
BCLC is good at developing employees to their utmost potential (%)





Customer Feedback is Shared

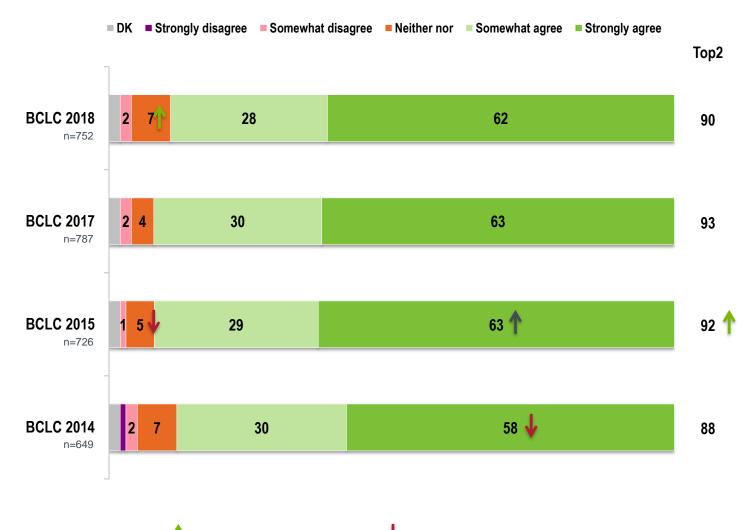
Customer feedback is shared across the company (%)





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

			•		Тор2
BCLC is a good corporate citizen	n=752 2018	5 27		67	94
	n=787 2017	4 28		66	94 🛧
	n=726 2015	5 2	9 🗸	62 🛧	91 🛧
	n=649 2014	2 9	35 🛧	52 🗸	87
BCLC encourages British Columbians to play responsibly	2018	4 23		72	95
	2017	20		76	96
	2015	4 22		72	94
	2014	4 26		68	94
BCLC is transforming to a player-centric company	2018	2 12	34	47	81
	2017	2 11	38	46 🛧	84 🛧
	2015	5 13	39	39	78
	2014	2 7 13	35	40	75 🗸
BCLC makes a positive contribution to the province of BC	2018	17	81		98
	2017	🐈 18	80		98 🔶
	2015	4 19	76		95
	2014	1 4 20	74		94
BCLC is environmentally responsible	2018	4 10	36	47	83
	2017	4 8	36	49	85
	2015	3 11	35	47	82 🛧
	2014	2 3 14	38	39	77
	· · · · · · · · · · · · · · · · · · ·				

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree



Corporate Citizen

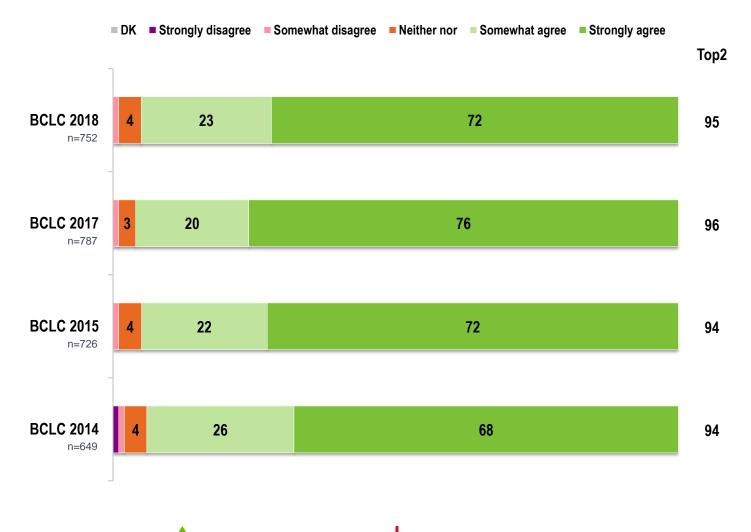
BCLC is a good corporate citizen (%)



playing it right

Play Responsibly

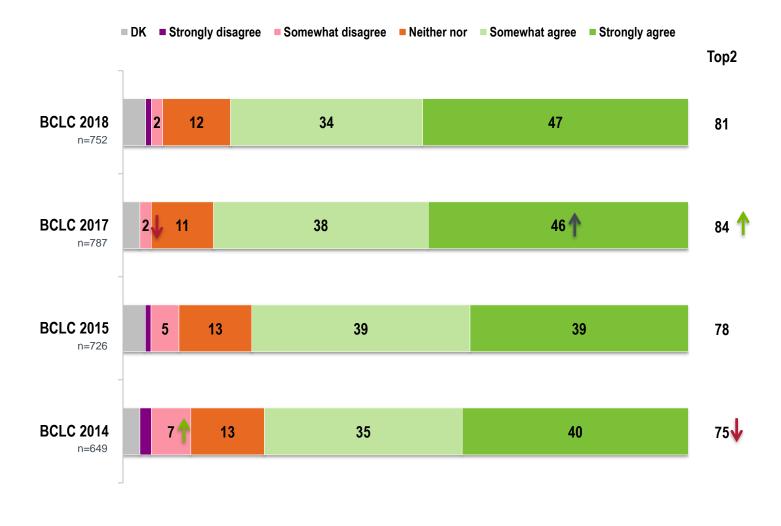
BCLC encourages British Columbians to play responsibly (%)





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 (%)





playing it righ

Provide Players with Exceptional Service

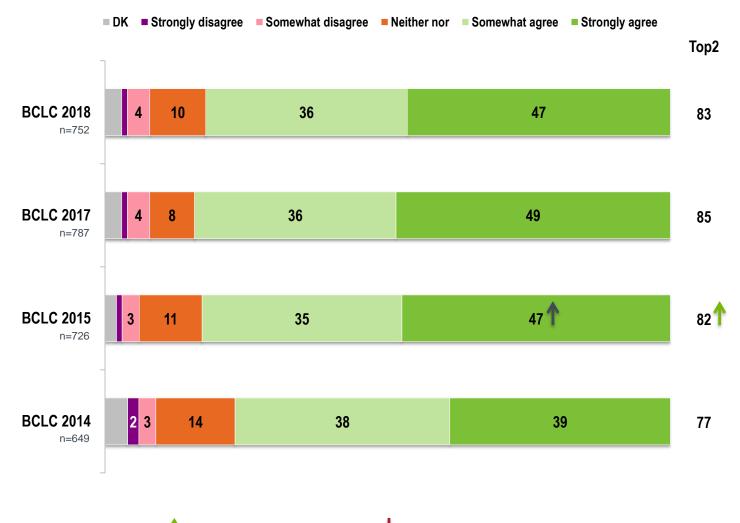
BCLC continuously innovates to provide players with an outstanding gambling experience (%)





Environmentally Responsible

BCLC is environmentally responsible (%)





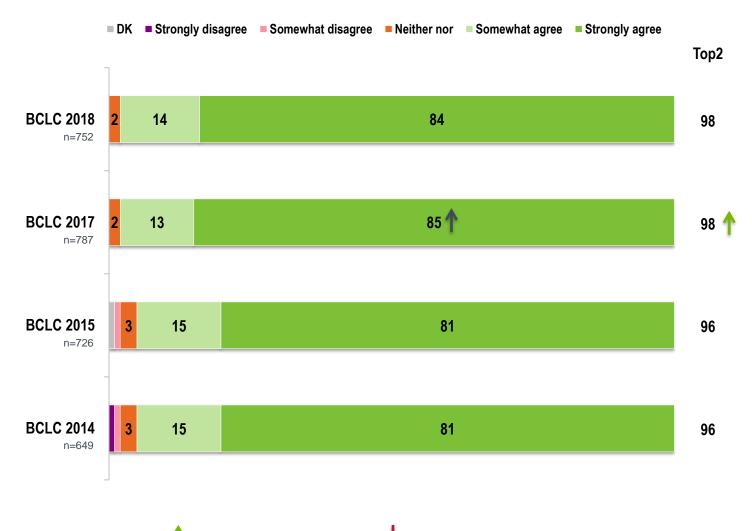
playing it right

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



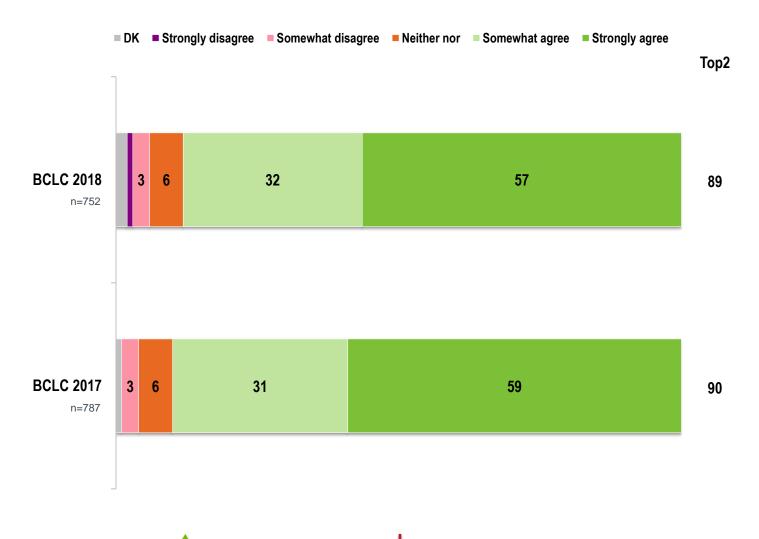
playing it righ

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



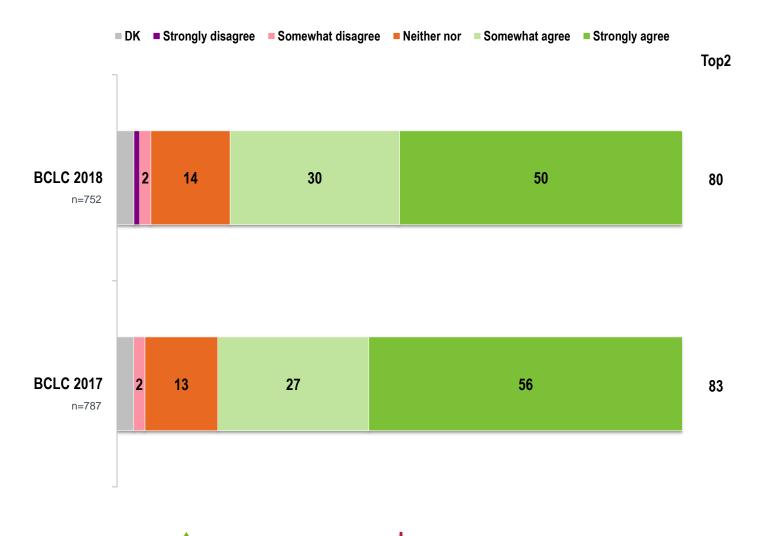
playing it righ

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



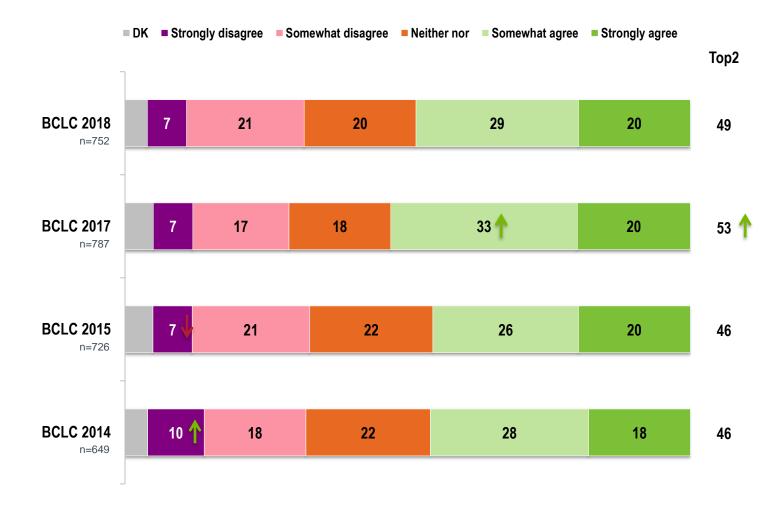


I consider responsible gambling implications when making business decisions in my role at BCLC (%)





Customer feedback is shared across the company (%)



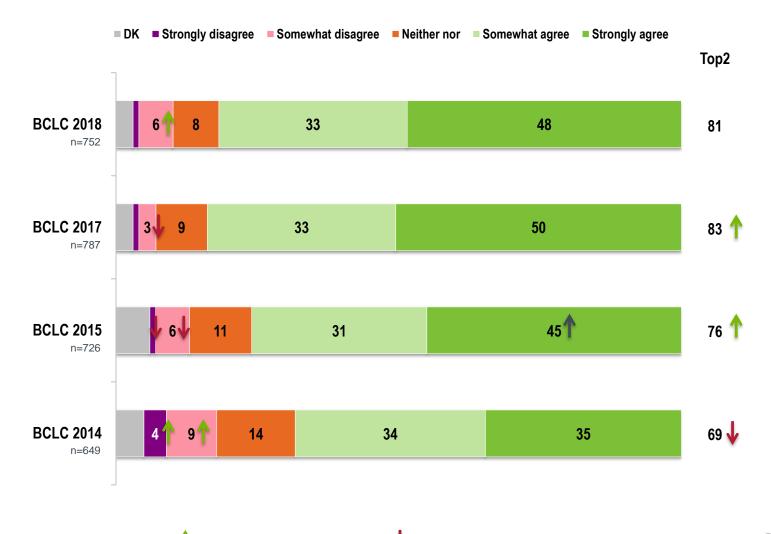


Senior Leadership



Senior Leadership Team Follows Values

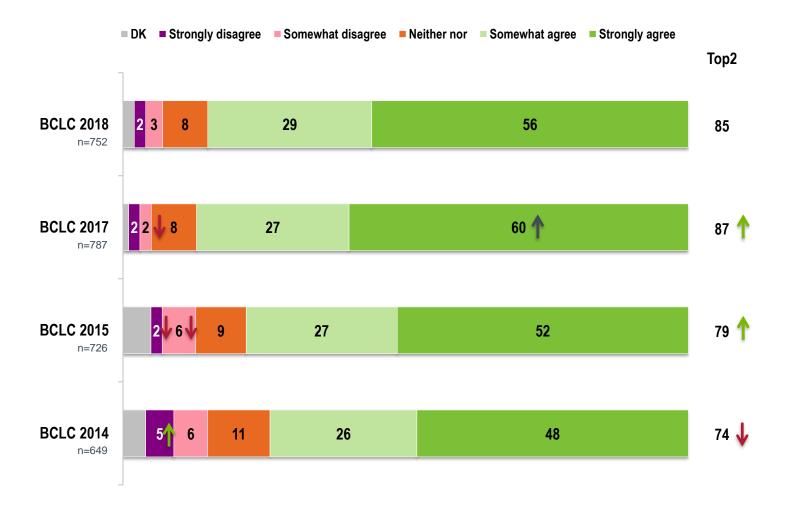
The actions of the entire Senior Leadership team of BCLC are consistent with BCLC values (%)





Division's Senior Leadership Team Follows Values

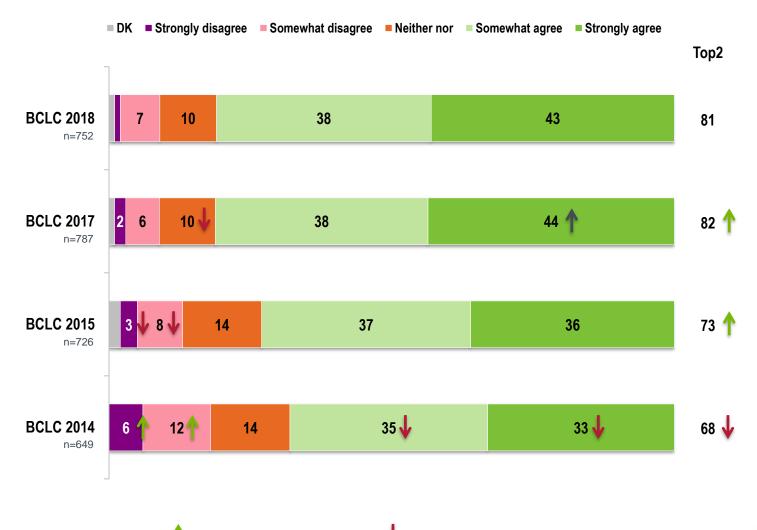
The actions of my division's Senior Leadership team are consistent with BCLC values (%)





Communication of BCLC Vision

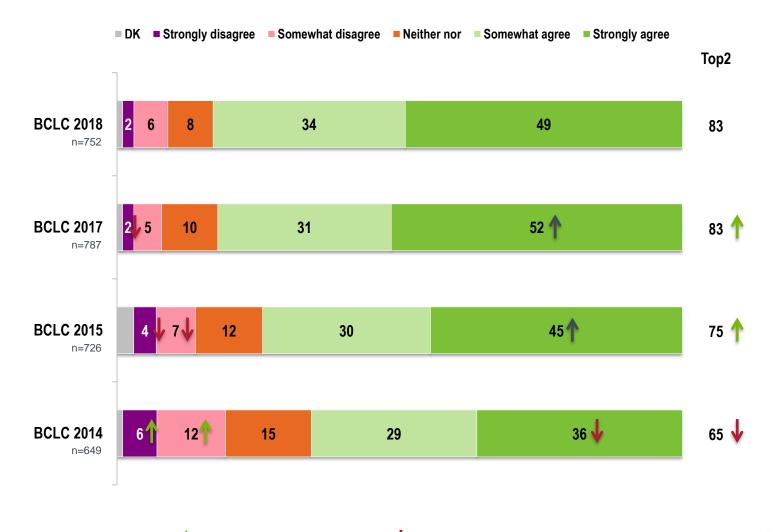
The entire Senior Leadership team communicates a clear vision of where BCLC is going (%)





Confidence in Decisions Made by Division's SLT

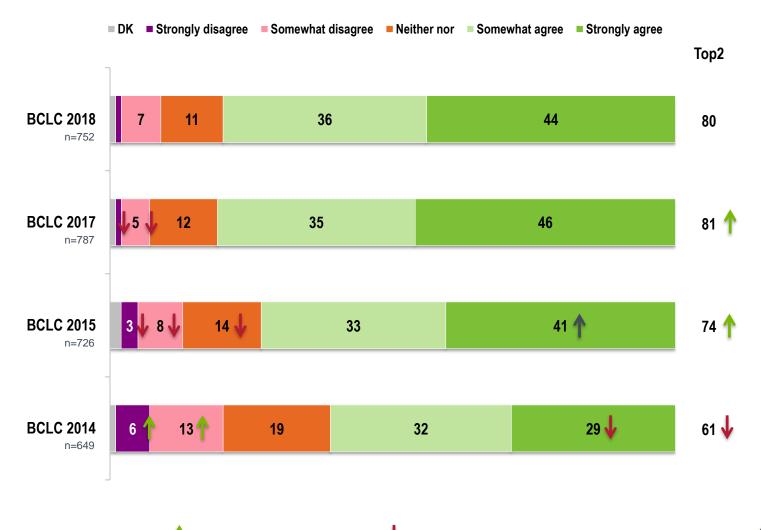
I have confidence in the decisions made by my division's Senior Leadership team (%)





Confidence in Decisions Made by Division's SLT

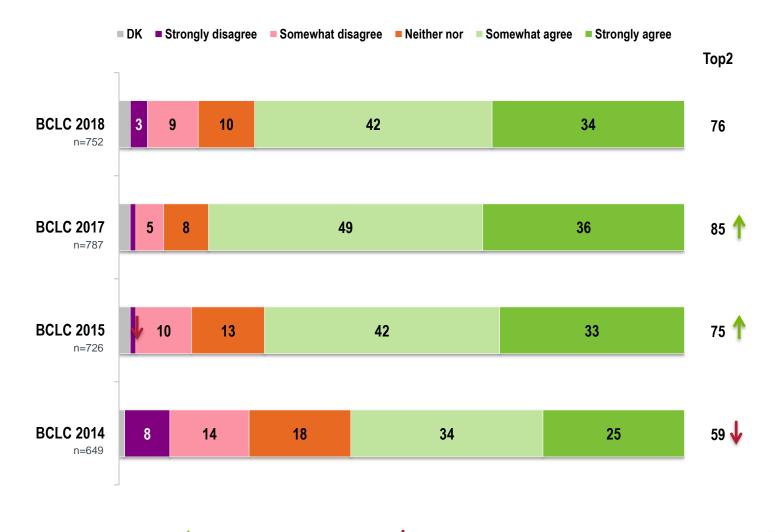
I have confidence in the decisions made by the entire Senior Leadership team (CEO, VPs and Directors) of BCLC (%)





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



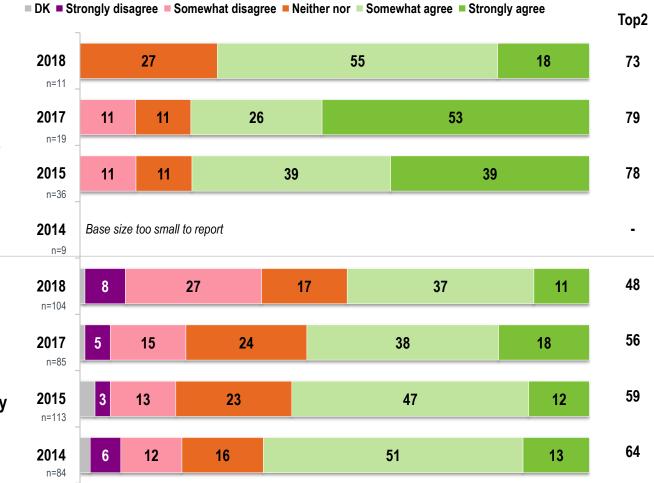
Support Offered to New Hires

		- - 0	, y alougi oo - o	enter along.		ior = Somewhat agree = Strongly agree	
	n=11 2018	9	9 36			55	
I received adequate support from the person I report to	n=19 2017	5	26			68	
	n=36 2015	1	9			81	
	n=9 2014	Base size too small to report					
I received adequate support from my mentor	2018		9	27		46	
	2017	5	5 5	26		53	
	2015		11			78	
	2014	Base size t	oo small to report				
I received adequate support from my colleagues	2018	9	9	27		55	
	2017	11		42		47	
	2015	8			92		
	2014	Base size too small to report					
I received adequate support from the HR department	2018	9	18	27		46	
	2017	5	26		32	37	
	2015	8	3	31		58	
	2014	Base size t	oo small to report				

DK Strongly disagree Somewhat disagree Neither nor Somewhat agree Strongly agree

Evaluation of the On-Boarding Process

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



The on-boarding process was critical to my success in my job

The on-boarding program helps new hires to become productive very quickly



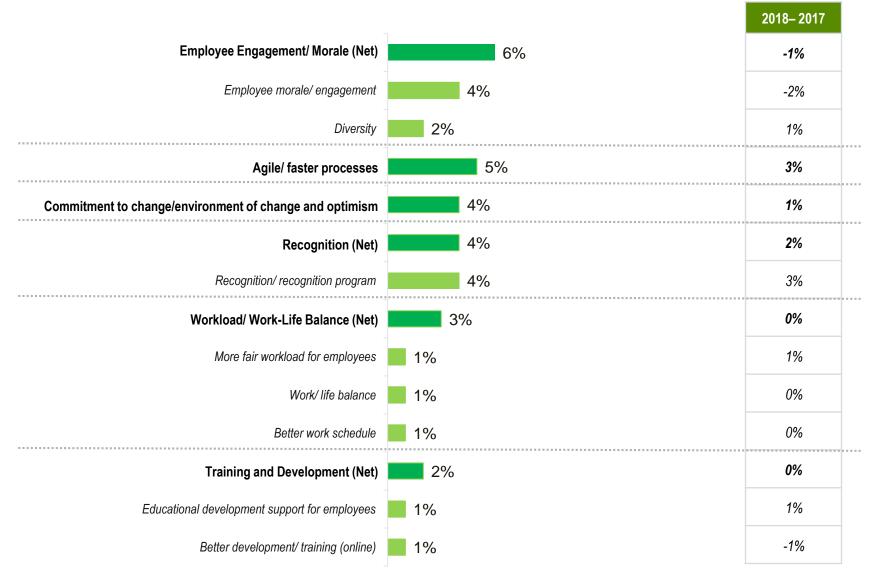




		2018– 2017
Communication/ Information (Net)	16%	-3%
Better communications	13%	5%
Better access to/ communication with management/ leadership	2%	-6%
Better communication internally/ between departments	1%	-2%
Teamwork/ Collaboration across Departments (Net)	8%	-1%
Collaboration (between departments)	4%	-2%
Team work oriented company	2%	1%
Working relationship with peers/ government	2%	1%
Support from different departments to improve the commercial strategy	1%	1%
Leadership Strategy (Net)	6%	-7%
Visions/ goals/ strategies are clear/ communicated well	3%	-1%
Strategic direction/ vision	2%	0%
New management	1%	0%
Improved/ stronger leadership	1%	-2%
Human Resources/ HR processes	1%	-1%

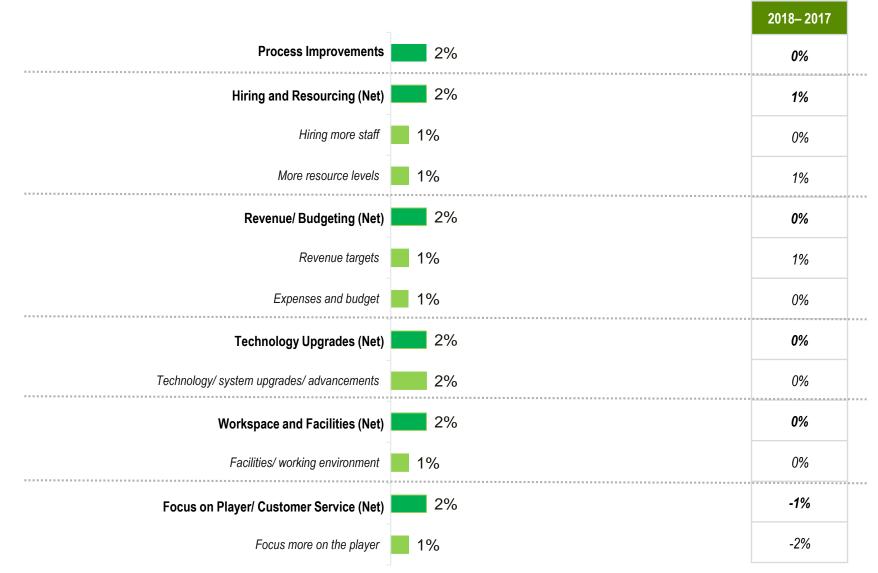


Q32. Finally, what are two things that have improved significantly at BCLC in the past year?



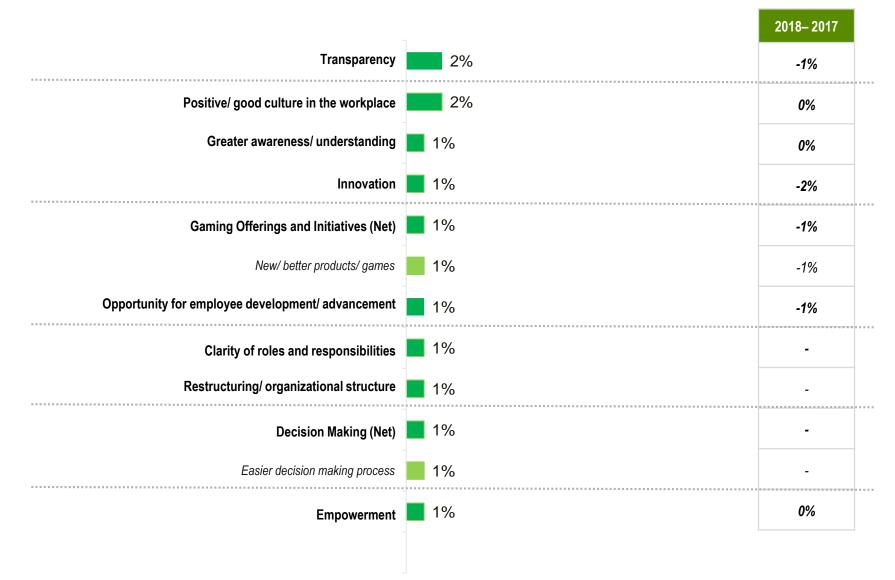


Q32. Finally, what are two things that have improved significantly at BCLC in the past year?



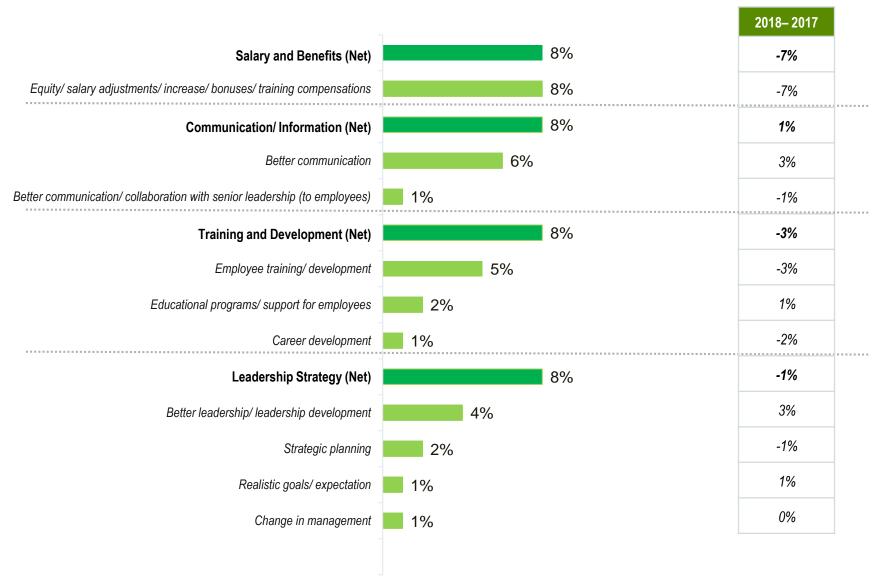


Q32. Finally, what are two things that have improved significantly at BCLC in the past year?





Q32. Finally, what are two things that have improved significantly at BCLC in the past year?





Q33. What are two things that are priority areas for improvement at BCLC over the next year?

		2018– 2017
Agility/ focus on agility	7%	<u> </u>
Project Management (Net)	7%	2%
Prioritization/ management of projects	4%	0%
Better timelines/ schedules for projects	3%	1%
Teamwork/ Collaboration across Departments (Net)	5%	-3%
Improve business alignment/ consolidation/ standardization/ collaboration	3%	-1%
Team building activities	2%	1%
Integration across all departments/ divisions	1%	-2%
Workload/ Work-Life Balance (Net)	4%	-2%
Work/ life balance	2%	0%
Better work load spread/ reduce amount of projects	2%	0%
Flexibility in working schedules	1%	-1%
Anti- Money Laundering policy (AML)	3%	<u> </u>
Adaptability/ ability to adapt to changes	3%	<u> </u>
Remove barriers/ red tape/ layers of bureaucracy	3%	1%



Q33. What are two things that are priority areas for improvement at BCLC over the next year?

		2018– 2017
Recognition (Net)	3%	0%
Employee recognition	3%	0%
Transparency	3%	1%
Innovation/new products	2%	-2%
Employee retention	2%	-1%
Work/ change processes	2%	-2%
Clear/ well-defined roles and responsibilities	2%	-1%
Revenue/ Budgeting (Net)	2%	-1%
Budget management/ resource allocation/ planning	1%	-2%
Revenue/ income management	1%	0%
Corporate Image/ Marketing (Net)	2%	1%
Improve public relations/ media utilization	2%	<u> </u>
Technology Upgrades (Net)	2%	-1%
Continued upgrades on technology/ systems/ technical requirements	1%	-1%
Accountability	2%	0%



Q33. What are two things that are priority areas for improvement at BCLC over the next year?

		2018– 2017
Focus on Player/ Customer Service (Net)	1%	-1%
Focus on player	1%	-1%
Need more resources	1%	0%
Employee Engagement/ Morale (Net)	1%	-2%
Employee engagement	1%	-1%
oduct development/ testing (completion of previous/ new projects)	1%	-
Decision Making (Net)	1%	-1%
Improve decision makings	1%	-1%
Hire more staff	1%	0%
Equal treatment/ recognition between divisions	1%	0%
Attracting new customers/ access new markets	1%	-1%
Speed/ time to market	1%	-1%
Workspace and Facilities (Net)	1%	0%
More room/ office space/ locations/ updated facilities	1%	0%
Better security measures	1%	0%



Q33. What are two things that are priority areas for improvement at BCLC over the next year?