



Greater Victoria Gaming Facility Survey Report

Methodology

These are the results of a survey of 504 adult (19+ residents) of the Greater Victoria region conducted online between July 20th and August 4th, 2016.

The Greater Victoria region includes the municipalities of the CRD (Capital Region District) excluding any Gulf Island municipalities.

The survey screened out current/past Voluntary Self-Exclusion program participants, as well as those working in the following industries/organizations:

- A newspaper or magazine
- A market research department or company
- Digital media sales or content hosting
- A bingo hall, casino, community gaming centre, racetrack or lottery ticket retailer
- An Internet gambling company
- British Columbia Lottery Corporation

The precision of Ipsos online polls is measured using a credibility interval. In this case, the survey has a credibility interval of plus or minus 5.0 percentage points.

Survey data has been weighted to reflect the Greater Victoria region by age, gender and geography (City of Victoria, District of Saanich, rest of region) according to Census data.



KEY POINT SUMMARY

Key Point Summary

Most Greater Victoria residents have heard about the possibility of new facility. Almost seven-in-ten (68%) residents say they have read, seen or heard about the possibility of adding a new gaming and entertainment facility in Greater Victoria.

A slight majority of Greater Victoria residents think a new facility would be beneficial. Just over half of residents think a new gaming and entertainment facility would benefit the region (54% agree, 38% disagree, 8% undecided) and are personally interested in seeing this type of facility added to the region (51% agree, 42% disagree, 7%).

There is more agreement that that a new gaming and entertainment facility, located in the City of Victoria, would be appealing to tourists (69% agree, 23% disagree, 8% undecided).

Tax revenue, tourism and jobs are the main perceived benefits of adding a new facility. On a top-of-mind basis, Greater Victoria residents are most likely to mention tax revenue (24%), tourism (19%) and jobs (14%) as the main benefits that would result from adding a new gaming and entertainment facility in the region. Other benefits include having new entertainment options (10%), an economic boost (9%) and money supporting the local community (5%).

Key Point Summary

Gambling addiction is the number one concern about adding a new facility. On a top-of-mind basis, Greater Victoria residents are most likely to mention gambling addiction as a concern about a new gaming and entertainment facility in the region (29% mention). Other concerns include crime (13%), traffic/parking (9%), a belief a new facility is not needed (8%), people losing money they don't have (7%) and social issues (7%).

Entertainment and recreation activities have broader appeal than gambling activities for a new facility. A majority of Greater Victoria residents say they would be very or somewhat likely to visit a new facility at least once a year for seven different entertainment/recreation activities. The highest level of interest is to visit a restaurant with local cuisine (66% very/somewhat likely). Other activities with majority interest include big name act live music (61%), smaller/local act live music (60%), a family dining restaurant (55%), a buffet style restaurant (53%), a dinner theatre (53%) and comedy acts (51%).

Interest in visiting a new facility at least once a year for gambling activities is highest for slots (40% very/somewhat likely) and to buy lottery tickets (37%). Lower interest for gambling activities include table games (28%), bingo (25%), poker (21%), electronic bingo (19%) and Keno (17%).

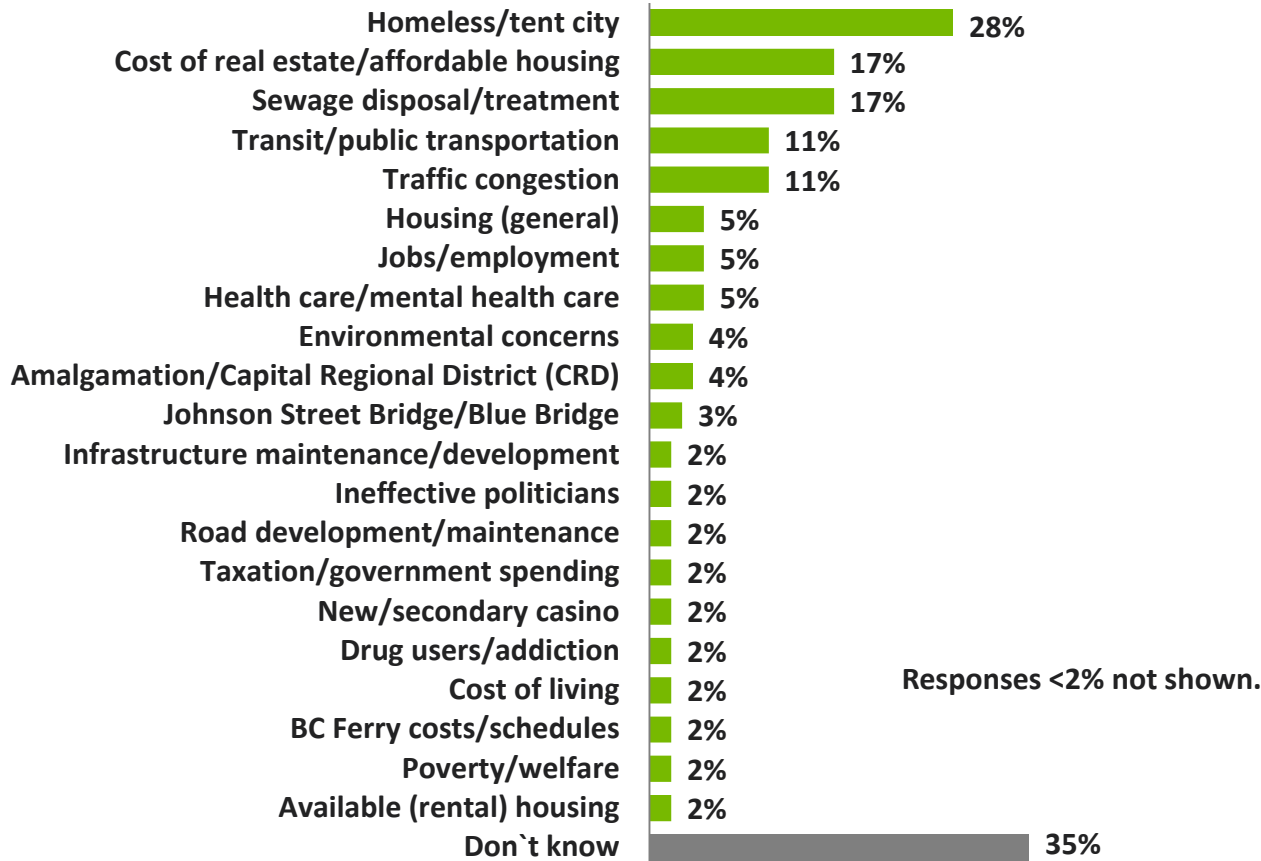


DETAILED RESULTS

Most Important Regional Issues (Coded Open-Ends)

The top three regional issues for residents are homelessness/tent city (28%), the cost of housing (17%) and sewage treatment (17%). Other frequently mentioned issues include transit (11%) and traffic (11%).

Two percent of residents mention a new/secondary casino as a top of mind issue.

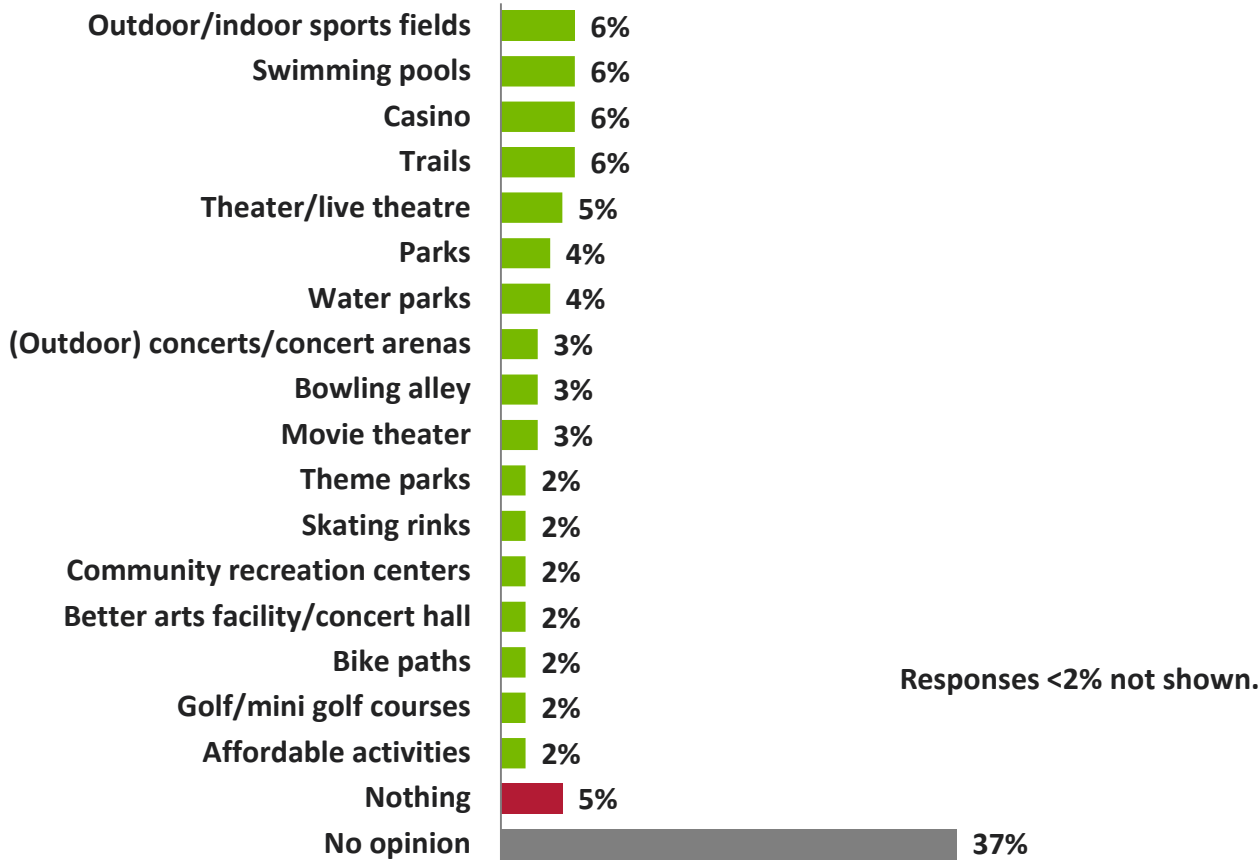


Q. What in your view are the one or two most important issues facing the Greater Victoria region today, that is the ones that you feel should receive the greatest attention from local leaders?

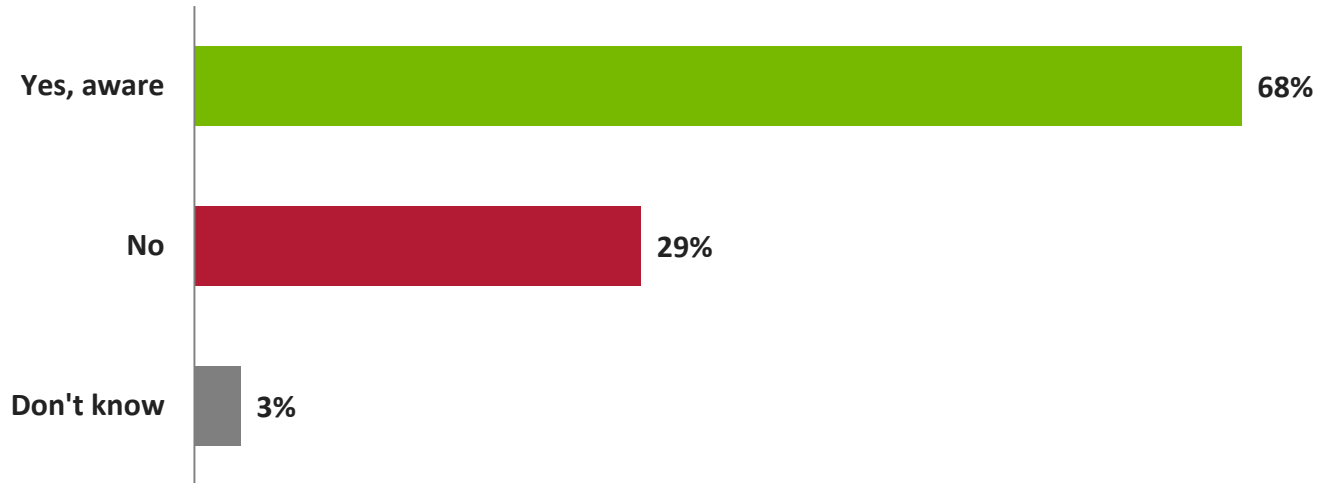
Base: All respondents (n=504)

Entertainment/Recreation Facilities Desired for Region (Coded Open-Ends)

Six percent of residents mention a casino as a top-of-mind entertainment or recreation facility they would like to see added or expanded in the region. This places a casino as the number one mention, tied with sports fields, swimming pools and trails (all with 6%).



Nearly seven-in-ten (68%) residents say they have read, seen or heard about the possibility of adding a new gaming and entertainment facility in Greater Victoria.



Preamble: As you may know, the City of Victoria has been selected as the preferred host for a new gaming and entertainment facility for the Greater Victoria region. The existing View Royal Casino will remain the primary gaming facility in the region.

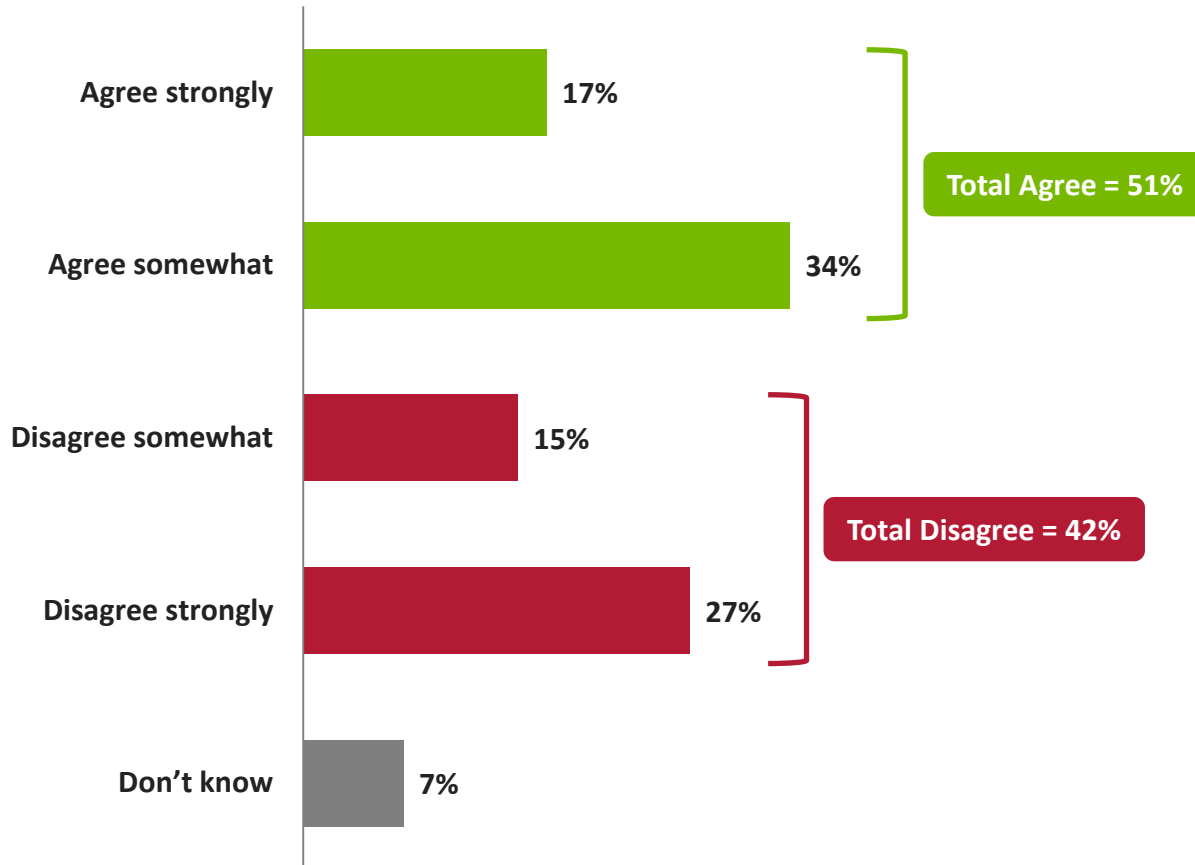
The type of gaming facility to be developed has not been decided, but it could include a combination of slot machines, table games and bingo (or electronic bingo). Additional features may include restaurants, lounge, theatre, conference centre, hotel, spa and a stage area for live entertainment performances. The gaming floor is expected to be in the range of 15,000 to 30,000 square feet and the gaming facility is expected to have a minimum of 400 parking stalls.

Q. *Prior to today, had you read, seen or heard about the possibility of adding a new gaming and entertainment facility in Greater Victoria?*

Base: All respondents (n=504)

Agreement “I personally would like to see this type of gaming and entertainment facility added to the region”

A slight majority (51%) of residents agree that they personally would like to see this type of gaming and entertainment facility added to the region. Four-in-ten (42%) disagree they would like to see this type of facility, while 7% are undecided.

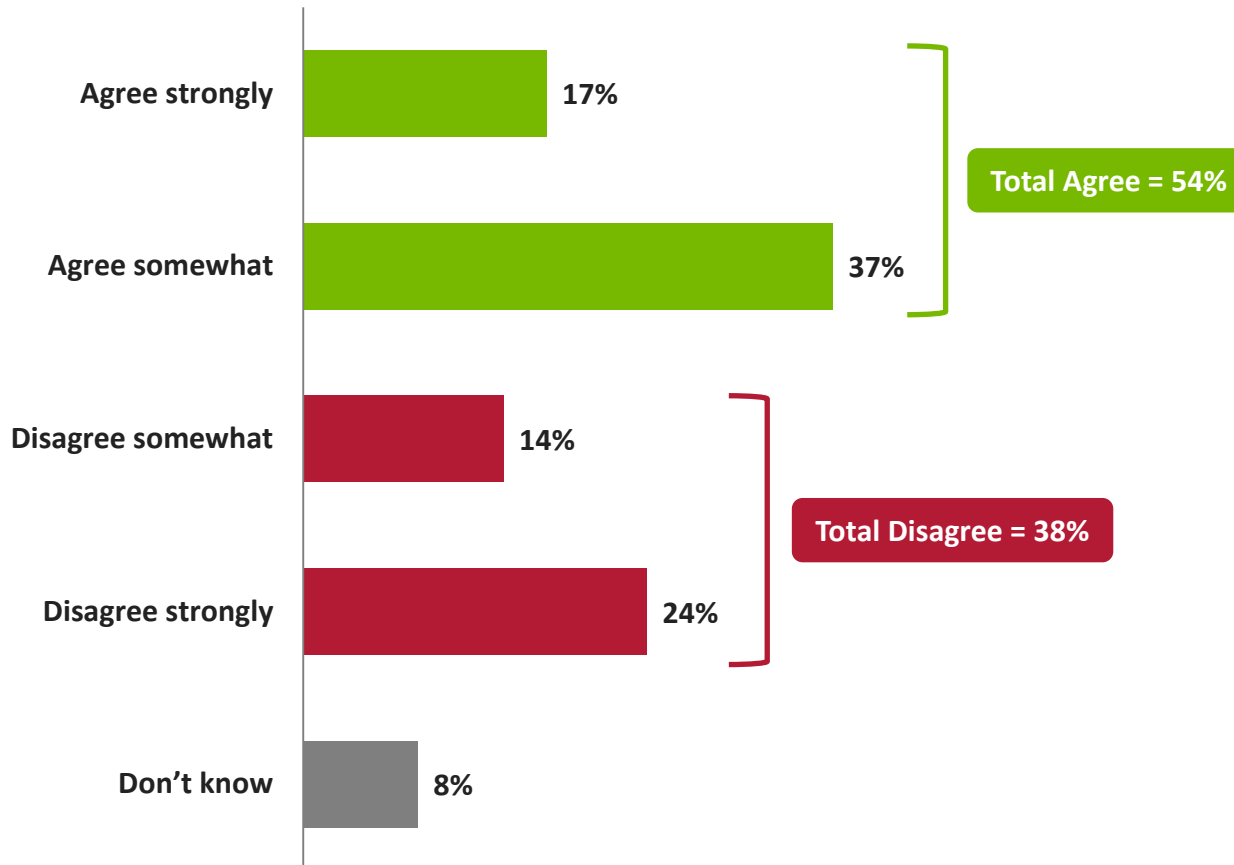


Q. Do you agree or disagree with each of the following statements about the addition of this type of gaming and entertainment facility in the Greater Victoria region? (I personally would like to see this type of gaming and entertainment facility added to the region)

Base: All respondents (n=504)

Agreement “I think the region would see an overall benefit from adding this type of gaming and entertainment facility”

A slim majority (54%) agree the region would see an overall benefit from adding this type of gaming and entertainment facility. Nearly four-in-ten (38%) disagree the region would see this benefit, while 8% are undecided.

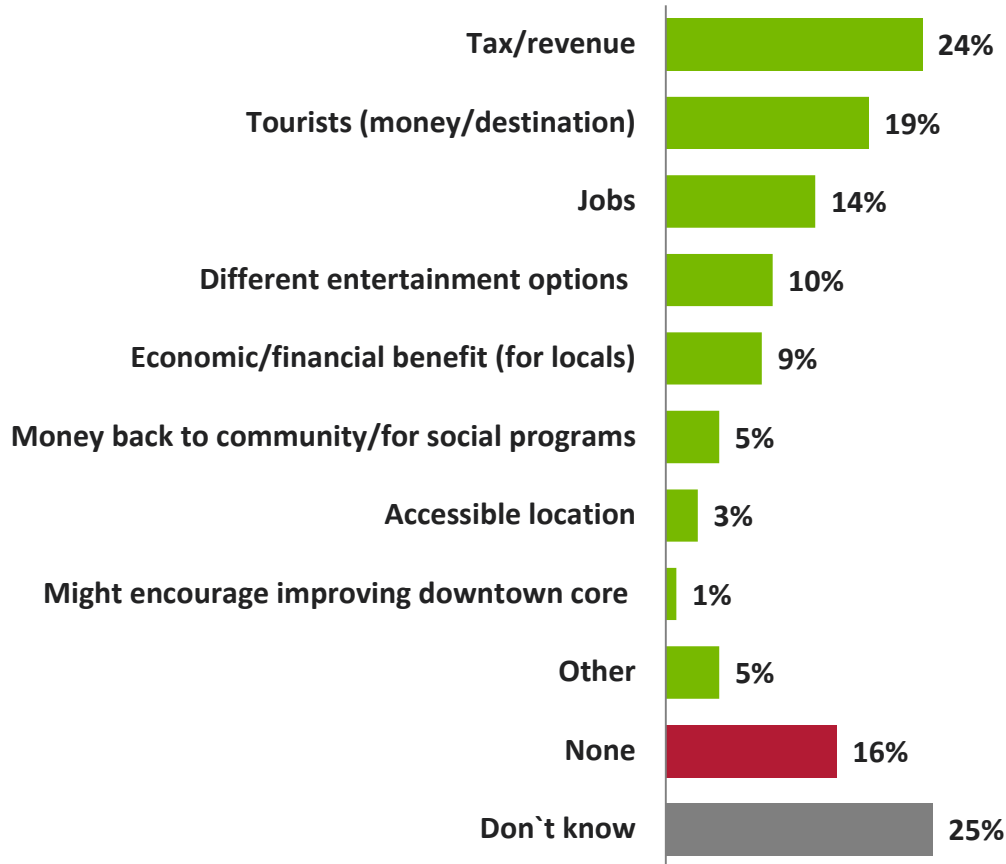


Q. Do you agree or disagree with each of the following statements about the addition of this type of gaming and entertainment facility in the Greater Victoria region? (I think the region would see an overall benefit from adding this type of gaming and entertainment facility)

Base: All respondents (n=504)

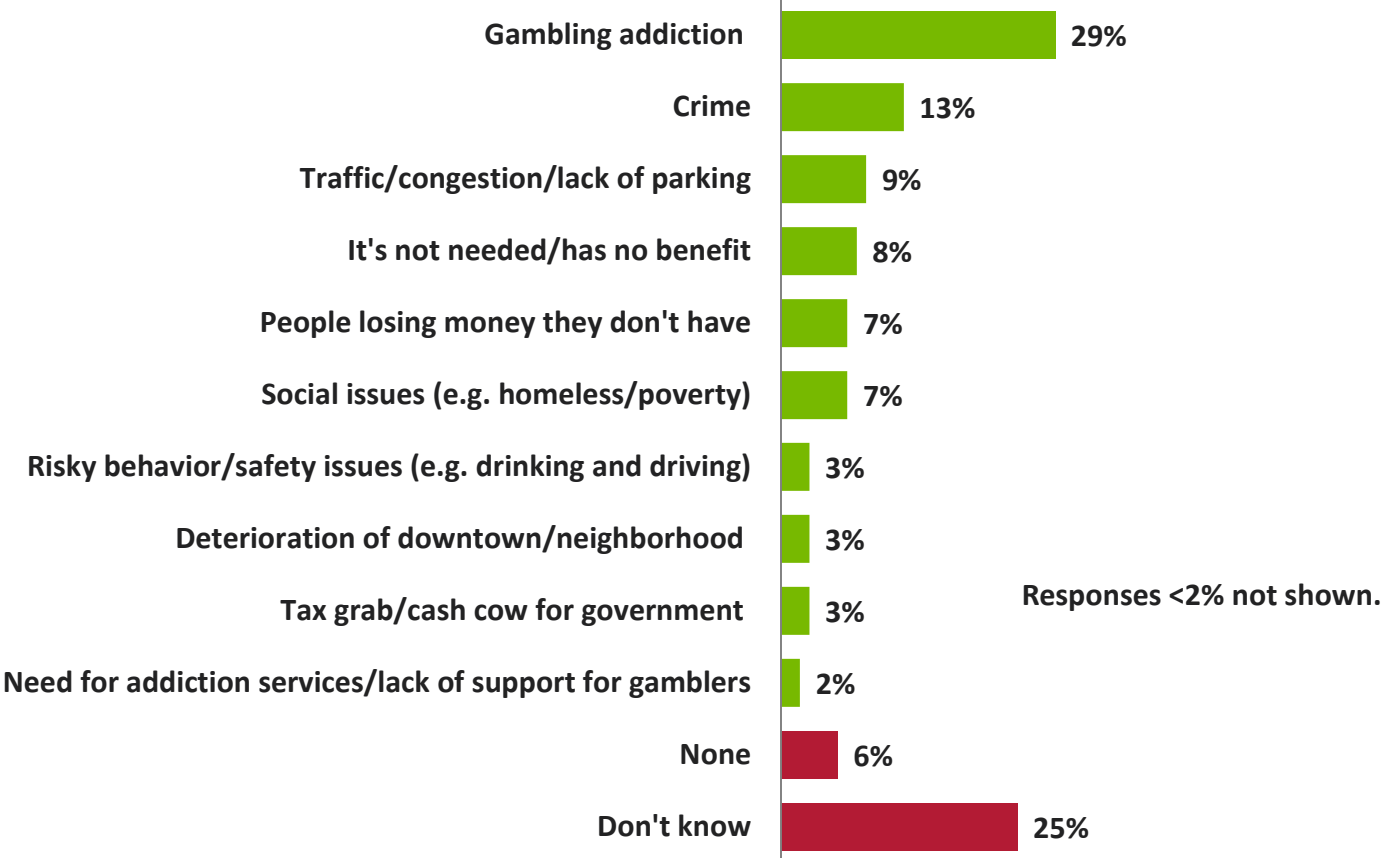
Main Benefits of New Gaming and Entertainment Facility in Region (Coded Open-Ends)

Residents mention a number of benefits they think would result from adding a new gaming and entertainment facility in the Greater Victoria region. The top three are tax revenue, tourism and jobs. Other mentions include having new entertainment options (10%), a boost to the economy (9%) and money for the local community/social programs (5%).



Main Concerns with New Gaming and Entertainment Facility in Region Ipsos Public Affairs (Coded Open-Ends)

Gambling addiction is the top unaided concern about a new gaming and entertainment facility in the region (29% mention). Lesser concerns include crime (13%), traffic/parking (9%), that a new facility is not needed (8%), people losing money they can't afford (7%) and social issues (7%).

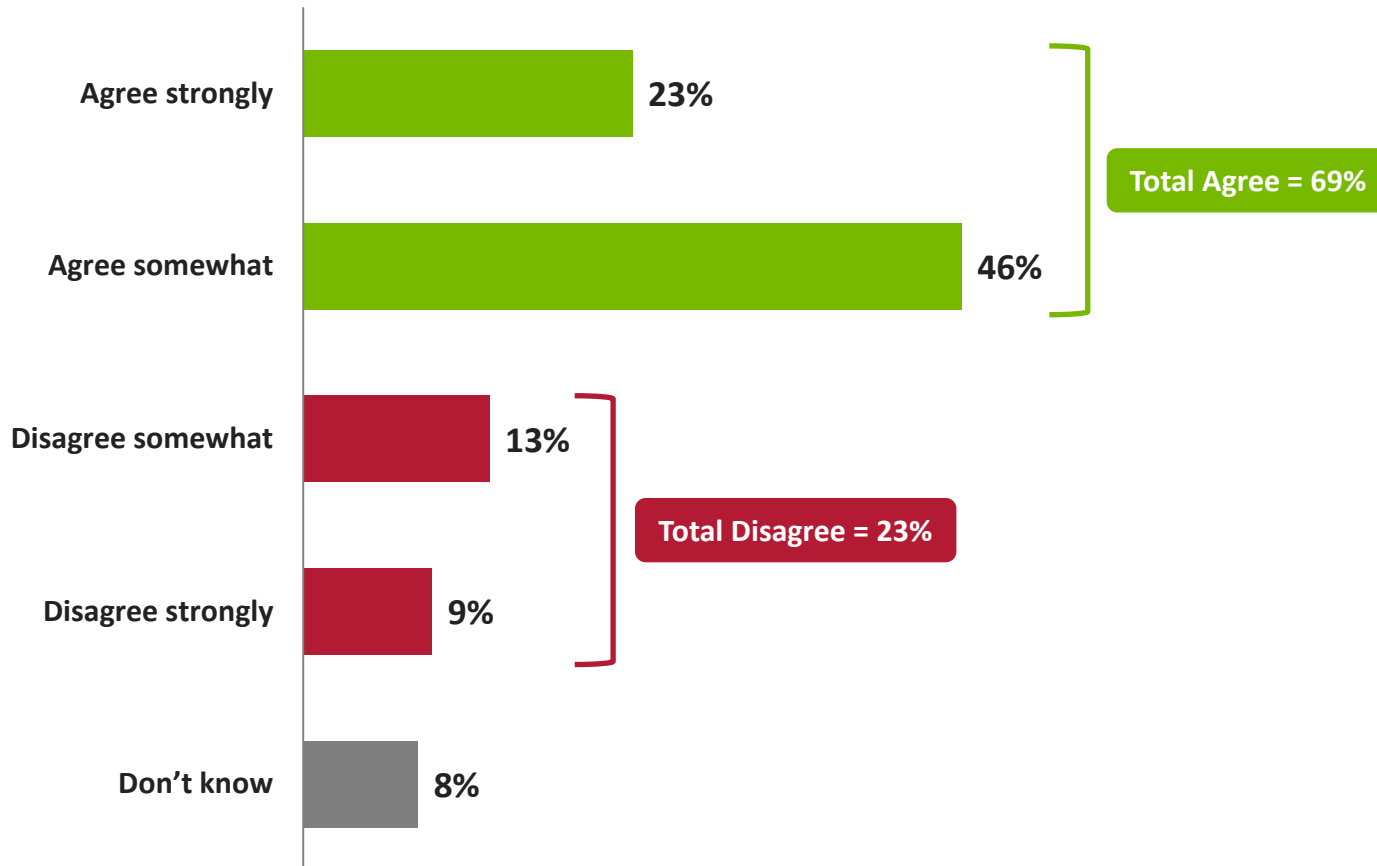


13 Q. What, if any, are the one or two main concerns you have about adding a new gaming and entertainment facility in the Greater Victoria region?
 Base: All respondents (n=504)



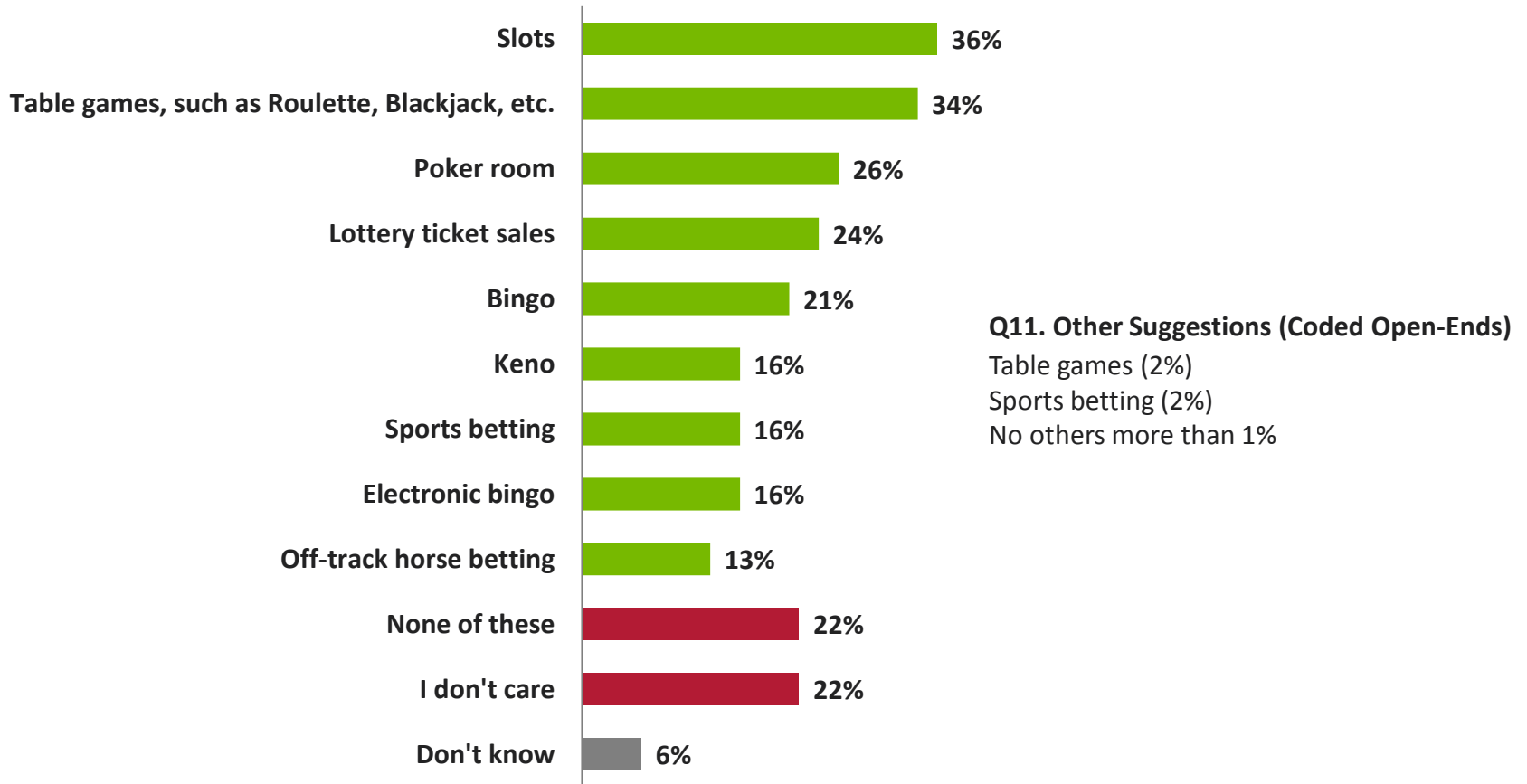
Agreement New Victoria Facility will Appeal to Tourists

Seven-in-residents (69%) agree that a new gaming and entertainment facility, located in the City of Victoria, would be appealing to tourists. Only one-quarter (23%) disagree the facility would appeal to tourists, while 8% are undecided.



Among several gambling activities tested, residents are most likely to say they would be personally interested in seeing a new facility have slots (36%), tables games (34%) and a poker room (26%). Two-in-ten (22%) residents say they don't want to see any of the tested gaming activities in a new facility and a further two-in-ten (22%) say they don't care.

Overall, half of residents (50%) say they would like to see at least one of the prompted activities included in a new facility.



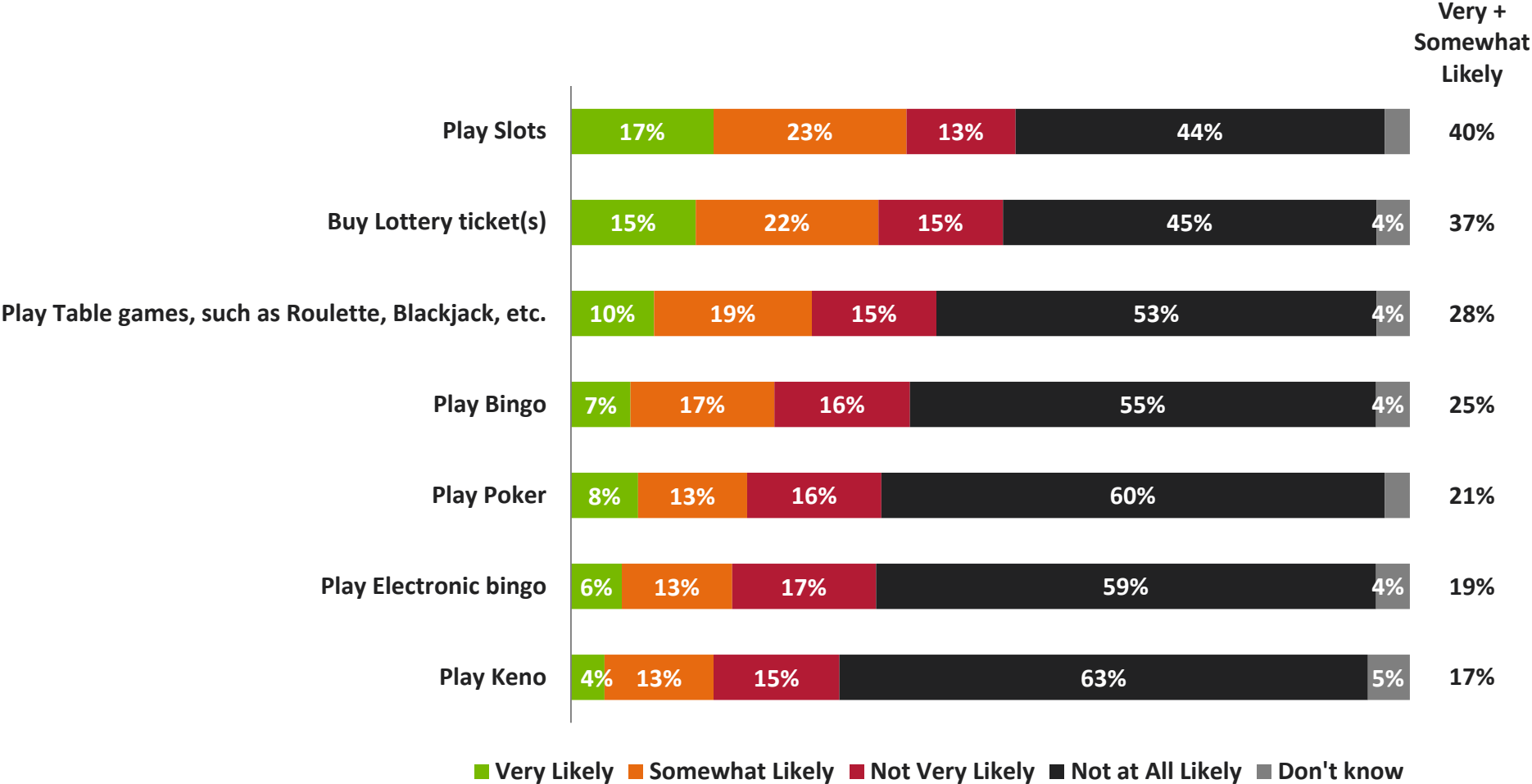
Q. Which of the following gambling activities would you personally like to see included in any new gaming and entertainment facility in the Greater Victoria region?

Q. What other gambling activities would you like to see included in a new gaming and entertainment facility in the Greater Victoria region?

Base: All respondents (n=504)

Likelihood of Visiting New Facility for Gambling Activities

Four-in-ten residents say they would be very or somewhat likely to visit a new facility at least once a year to play slots (40%) or to buy lottery tickets (37%).

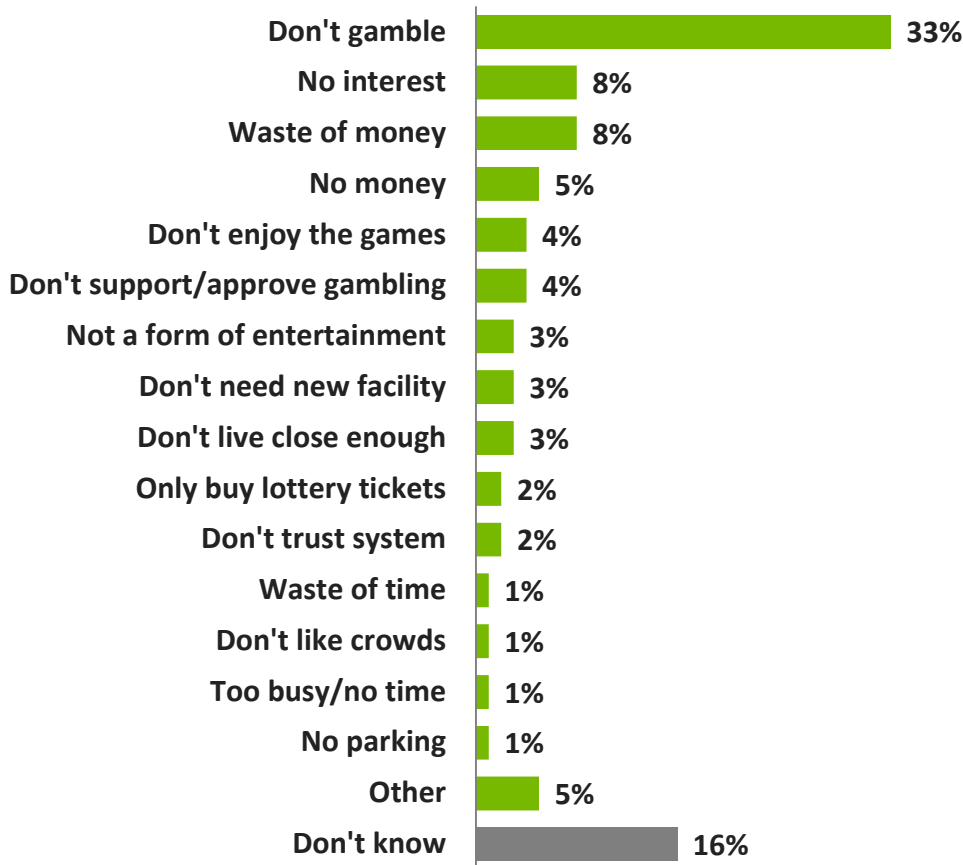


16 Q. How likely is it that you personally would visit a new gaming and entertainment facility located in the City of Victoria (at least once a year) to participate in each of the following gambling activities?
 Base: All respondents (n=504)



Reasons for Not Participating in Gambling Activities at New Facility (Coded Open-Ends)

Those respondents who didn't say they were 'very likely' to visit a new facility for any of the gambling activities (72% of respondents) were asked to indicate the main reason for their lack of interest. By far the top unaided response was that they don't gamble (33%). Other responses included having no interest (8%), seeing it as a waste of time (8%) and having no money (5%).



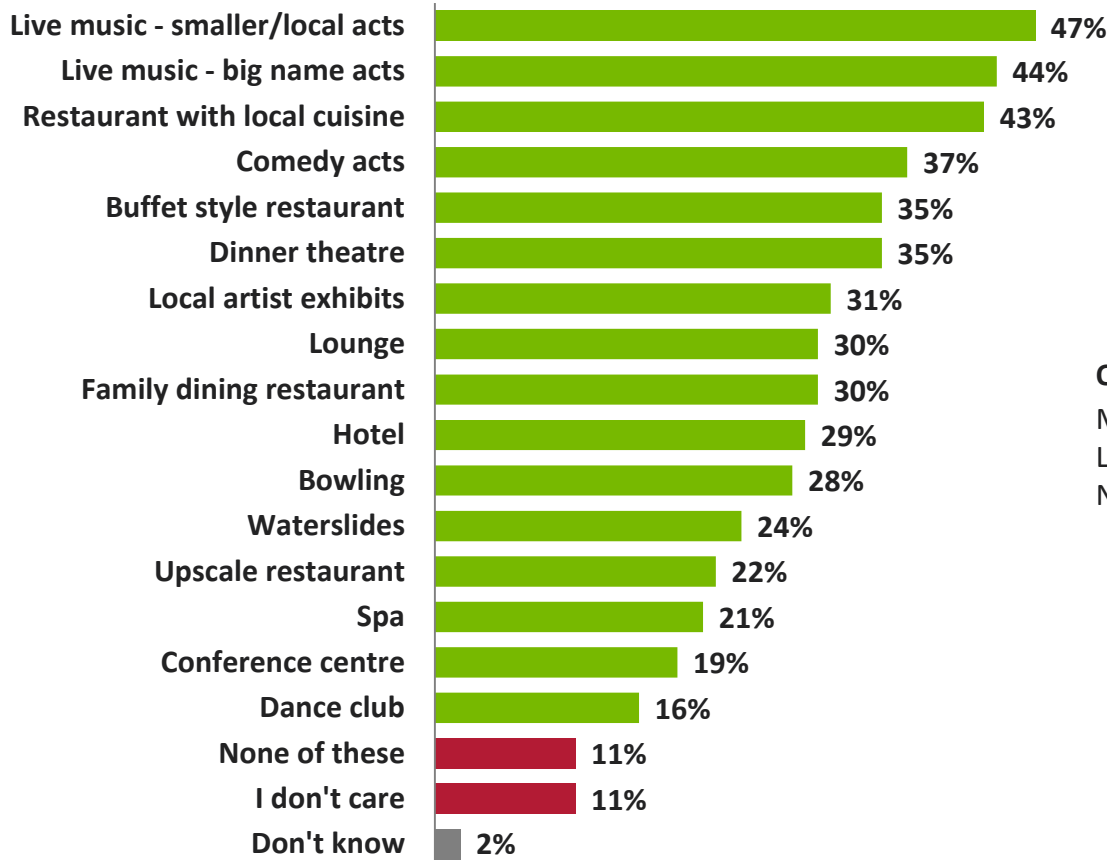
Q. What is the main reason that you are not very likely to participate in the gambling activities (listed in the previous question) at a new gaming and entertainment facility located in the City of Victoria?

Base: Not 'very likely' to any item in Q12 (n=357)

Desired Entertainment Activities/Features at New Facility

Among several recreation activities tested, residents are most likely to say they would be personally interested in seeing a new facility have live music with smaller/local acts (47%), live music with big name acts (44%) and a restaurant with local cuisine (43%). One-in-ten (11%) residents say they don't want to see any of the tested entertainment activities in a new facility and a further one-in-ten (11%) say they don't care.

Overall, three-quarters of residents (76%) say they would like to see at least one of the prompted entertainment activities included in a new facility.



Q15. Other Suggestions (Coded Open-Ends)

Movie theater (3%)
 Live shows - general (3%)
 No others more than 1%

Q. Which of the following entertainment activities or features would you personally like to see included in any new gaming and entertainment facility in the Greater Victoria region?

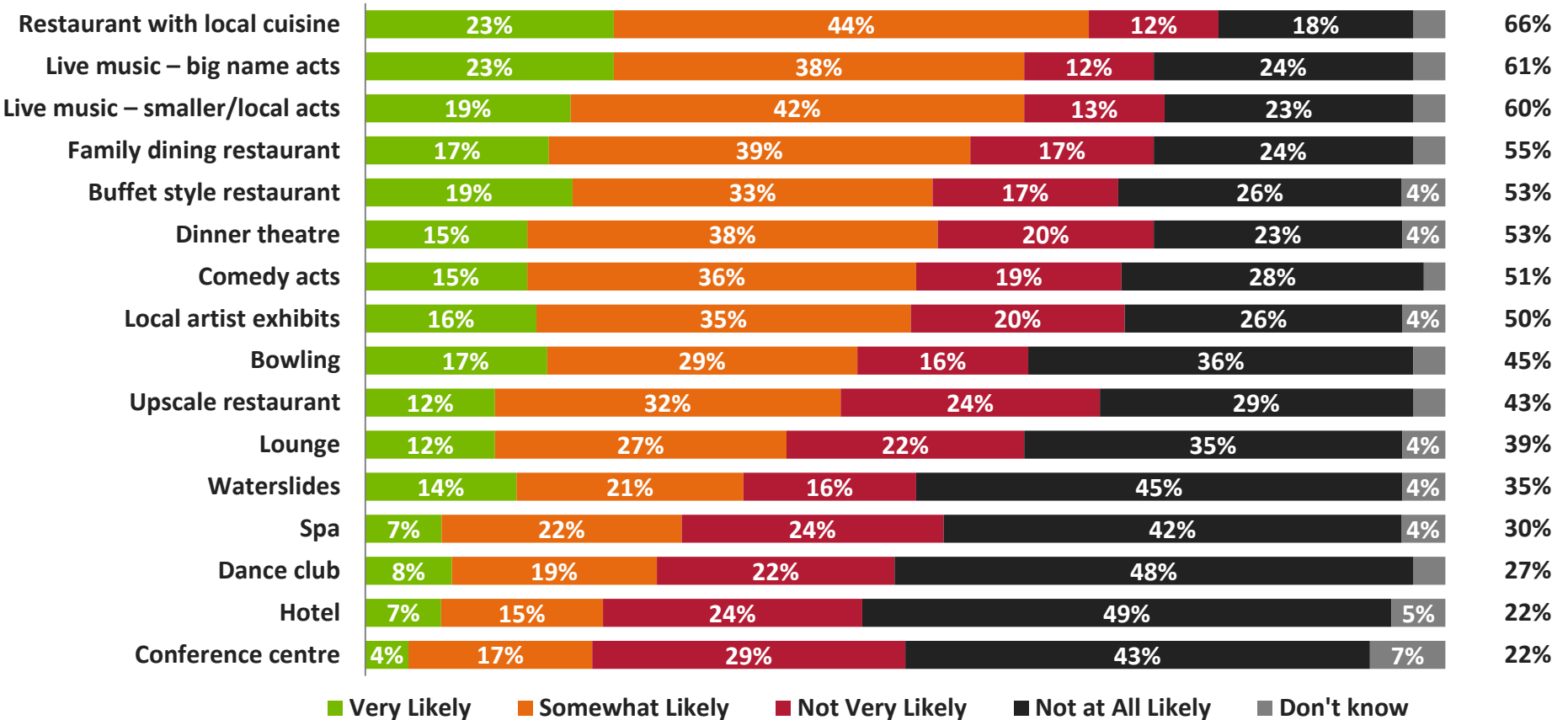
Q. What other entertainment activities or features would you like to see included in a new gaming and entertainment facility in the Greater Victoria region?

Base: All respondents (n=504)

Likelihood of Visiting New Facility for Entertainment Activities/Features

Two-thirds (66%) of residents say they would be very or somewhat likely to visit a new facility at least once a year to use a restaurant with local cuisine. Other activities with more than 50% interest include big name act live music (61%), smaller/local act live music (60%), a family dining restaurant (55%), a buffet style restaurant (53%), a dinner theatre (53%) and comedy acts (51%).

Very +
Somewhat
Likely

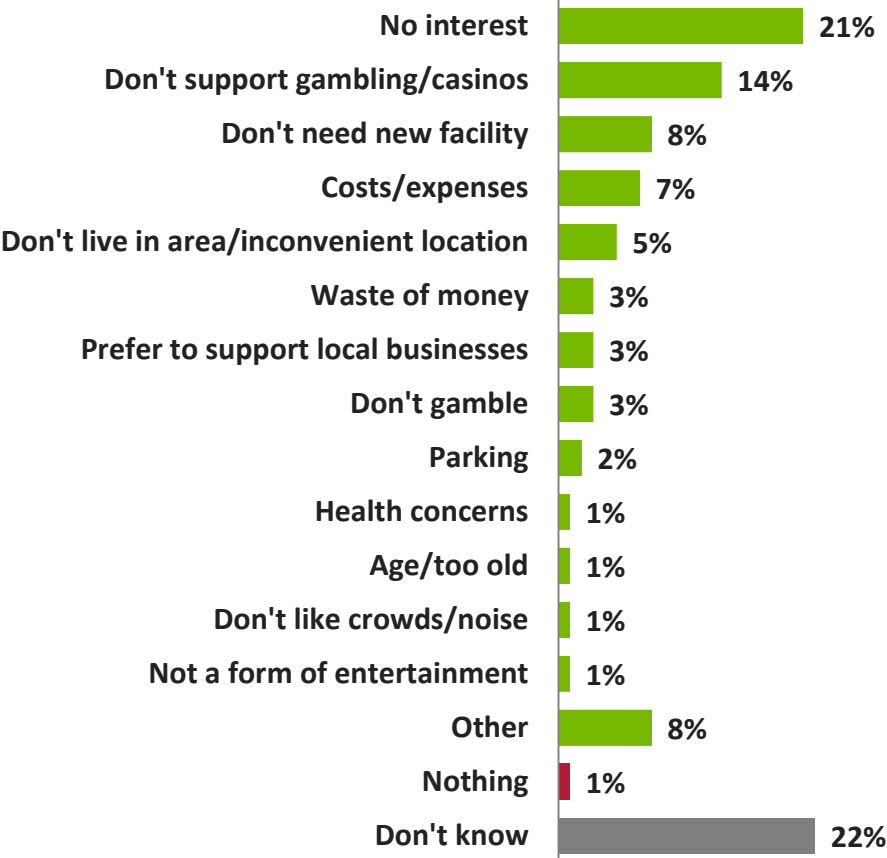


19 Q. How likely is it that you personally would visit a new gaming and entertainment facility located in the City of Victoria (at least once a year) to participate/use each of the following entertainment activities or features?
Base: All respondents (n=504)



Reasons for Not Participating in Entertainment Activities at New Facility Ipsos Public Affairs (Coded Open-Ends)

Those respondents who didn't say they were 'very likely' to visit a new facility for any of the entertainment activities (49% of respondents) were asked to indicate the main reason for their lack of interest. The top responses were a lack of interest (21%) and not supporting gambling/casinos (14%). Other responses included a belief that a new facility is not needed (8%), the cost (7%) and not living in area of a new facility (5%).

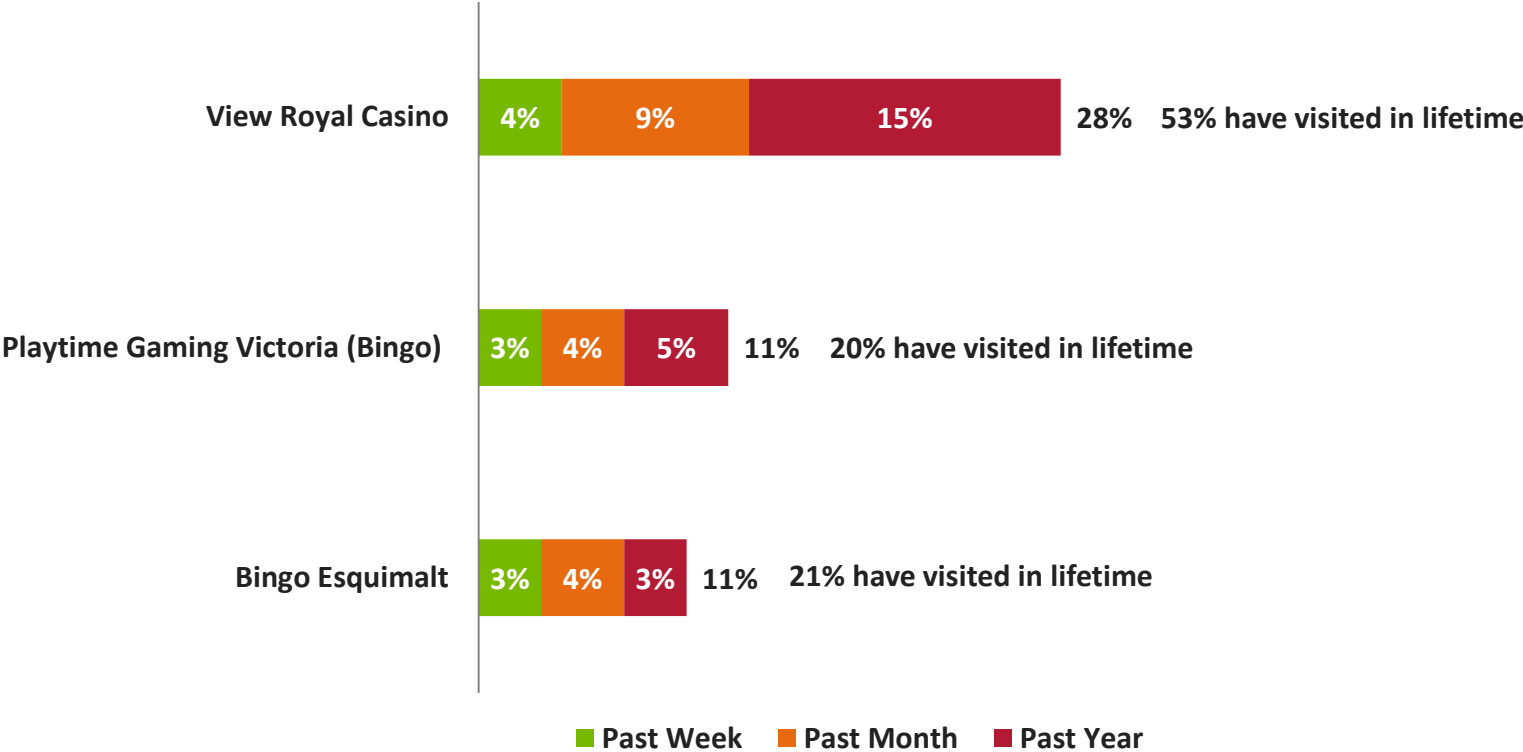


20 Q. What is the main reason that you are not very likely to participate in the entertainment activities/features (listed in the previous question) at a new gaming and entertainment facility located in the City of Victoria?
 Base: Not 'very likely' to any item in Q16 (n=240)



Last Visit to Existing Regional Gaming Facilities

Nearly three-in-ten (28%) residents say they have visited the View Royal Casino in the past year. Only about one-in-ten have visited each of the two bingo facilities in the past year (11% for each).



21 Q. When was the last time you visited each of the three existing gaming facilities in the Greater Victoria region?
 Base: All respondents (n=504)



Detailed Questions on Existing Facilities (Past Year Visitors)

The tables below break down past year visit frequency, attendance for gambling versus other activities, and overall experience for past year visitors to Greater Victoria's three facilities.

View Royal Casino (n=143 past year visitors)

Frequency of Visit	
Once a week	7%
Once every 2-3 weeks	17%
Once a month	19%
Once every 2-5 months	21%
1-2 times a year	29%
Less than once a year	7%

Activities During Visit	
Mostly for gambling activities	59%
Mostly non-gambling activities	15%
Both/Mix	26%

Overall Experience Last Visit	
Very good	24%
Good	49%
Fair	22%
Poor	4%
Very Poor	1%

Playtime Gaming Victoria (n=62 past year visitors)

Frequency of Visit	
Once a week	19%
Once every 2-3 weeks	22%
Once a month	16%
Once every 2-5 months	25%
1-2 times a year	16%
Less than once a year	3%

Activities During Visit	
Mostly for gambling activities	53%
Mostly non-gambling activities	20%
Both/Mix	26%
Don't know	1%

Overall Experience Last Visit	
Very good	29%
Good	46%
Fair	23%
Poor	2%
Very Poor	0%

Bingo Esquimalt (n=58 past year visitors)

Frequency of Visit	
Once a week	26%
Once every 2-3 weeks	25%
Once a month	24%
Once every 2-5 months	15%
1-2 times a year	9%
Less than once a year	1%

Activities During Visit	
Mostly for gambling activities	57%
Mostly non-gambling activities	22%
Both/Mix	21%

Overall Experience Last Visit	
Very good	28%
Good	50%
Fair	21%
Poor	2%
Very Poor	0%

Q. How often do you typically visit the following gaming facilities?

Q. When you do visit the following gaming facilities, is it mostly for gambling or for non-gambling activities?

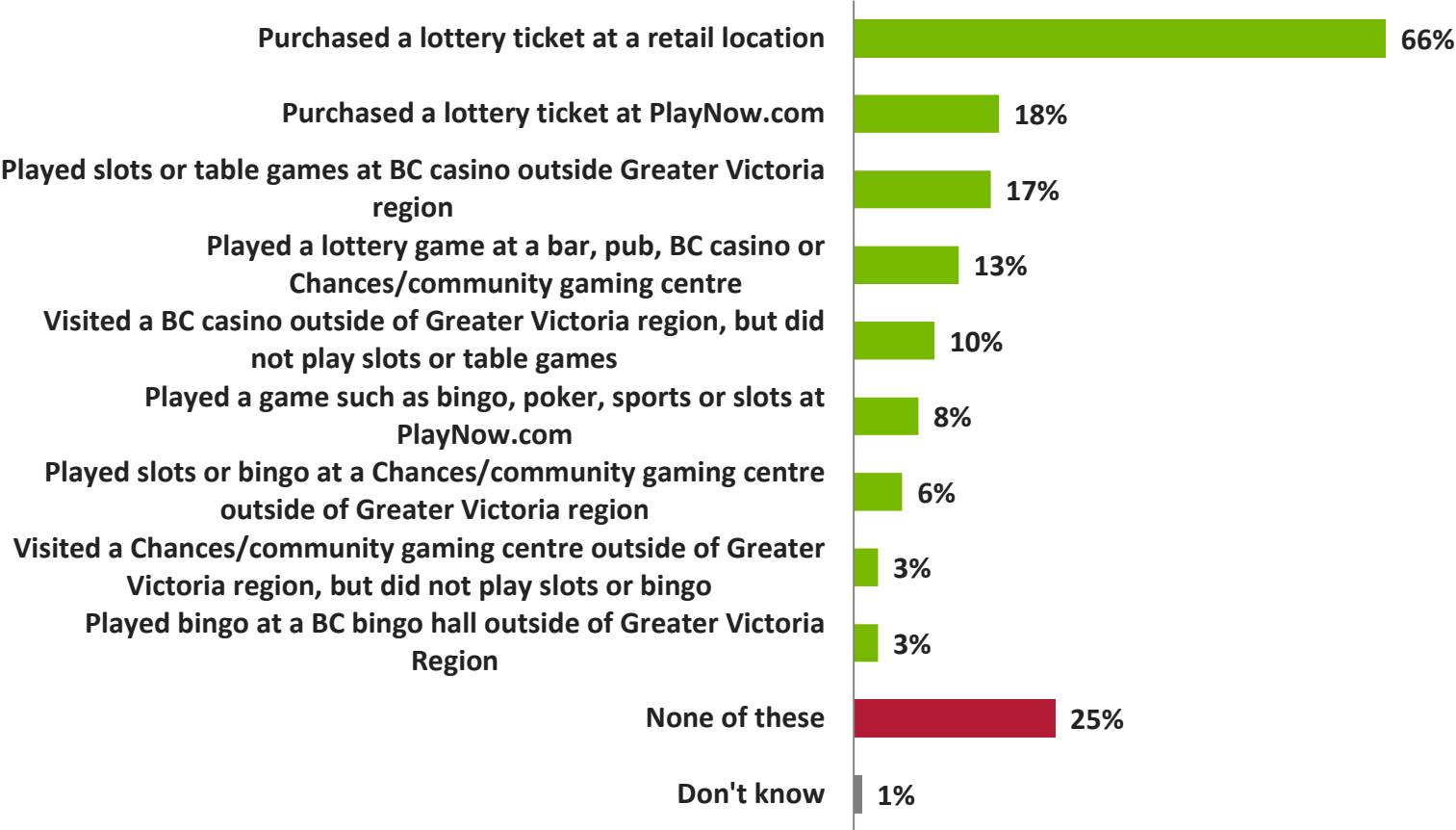
Q. How would rate your overall experience the last time you visited the following gaming facilities?

Base: Past year visitors

Past Year Participation in Gambling Activities

Two-thirds (66%) of residents have purchased a lottery ticket at a retail location in the past 12 months. No other tested gambling activity had more than 18% participation.

Three-quarters (74%) say they participated in at least one activity in the past year.





**DETAILED RESULTS
LATEST PROVINCIAL KPI
SURVEY COMPARISONS**

Greater Victoria residents are more likely than province-wide residents to say they have a somewhat unfavourable impression of BCLC, but total favourable and total unfavourable impressions are in line with each other.

	Greater Victoria Survey (n=504)	Province-wide KPI Q1 2016 (n=1,051)
Very favourable	19%	18%
Somewhat favourable	58%	63%
Somewhat unfavourable	18%	13%
Very unfavourable	5%	6%
Total Favourable	77%	81%
Total Unfavourable	23%	19%

25 Q. As you may be aware, BCLC is responsible for conducting and managing gambling in BC, including casino, lottery, bingo and sports betting. What is your overall impression of BCLC?

Base: All respondents

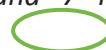
  Significant higher/lower (p<.05)

Greater Victoria residents are less likely than province-wide residents to agree they have trust and confidence in the games offered by BCLC.

Total Agree (5,6,7)	Greater Victoria Survey (n=504)	Province-wide KPI Q1 2016 (n=1,051)
BCLC provides revenue for the Province that benefits British Columbians	60%	65%
BCLC encourages responsible play	59%	64%
BCLC makes positive contributions to the province of BC	55%	57%
BCLC provides information about tools and resources to assist problem gamblers	54%	59%
BCLC promotes their games and products in a socially responsible way	54%	58%
BCLC is actively involved in educating players about playing responsibly	54%	57%
BCLC is operated fairly and honestly	49%	50%
I have trust and confidence in the games offered by BCLC	48%	55%
BCLC is a well-managed corporation	48%	48%
BCLC is a good corporate citizen	44%	47%
BCLC is forthcoming and open with the public	43%	46%
BCLC has a positive impact in the community where I live	40%	41%

Q. Below are some statements about BCLC. Please indicate how much you agree or disagree with each statement using a scale of 1 to 7, where "1" means you strongly disagree and "7" means you strongly agree.

Base: All respondents



Significant higher/lower (p<.05)

Greater Victoria residents are more likely than province-wide residents to feel they are informed about how the gambling industry provides benefits for their local community and where the proceeds from gambling revenue go.

Total Informed (Very Well + Somewhat Well)	Greater Victoria Survey (n=504)	Province-wide KPI Q1 2016 (n=1,051)
Who BCLC is and what they do	61%	59%
How gambling revenue is generated in BC	53%	49%
How the gambling industry provides benefits for the province of BC	50%	45%
How the gambling industry provides benefits for your local community	49%	43%
Where the proceeds from gambling revenue go	48%	42%
The organizations in the gambling industry in BC	40%	38%



Where Do BCLC Gambling Proceeds Go (Coded-Open Ends)

Greater Victoria residents generally are aligned with province-wide residents in terms of where they think BCLC gambling proceeds go, although they are less likely to believe it goes to gaming/gambling organizations.

	Greater Victoria Survey (n=504)	Province-wide KPI Q1 2016 (n=1,051)
Community/Province (Net)	27%	26%
Government/Politics (Net)	25%	24%
Charities/Non-Profit (Net)	16%	14%
Gaming/Gambling (Net)	11%	16%
Health (Net)	9%	6%
Sports (Net)	7%	7%
Grant/Programs (Net)	3%	4%
Other Mentions (Net)	12%	8%
Nothing	<1%	1%
Don't know	25%	25%

28 Q. To the best of your knowledge where do BCLC gambling proceeds go?

Base: All respondents



Significant higher/lower (p<.05)

Greater Victoria residents are less likely than province-wide residents to agree they support the existence of both legalized gambling and casino gambling. They are also less likely to agree that legalized gambling benefits the community through creating jobs for British Columbians.

Total Agree (5,6,7)	Greater Victoria Survey (n=504)	Province-wide KPI Q1 2016 (n=1,051)
I feel better about legalized gambling in BC when I know where the proceeds from gambling go	60%	62%
I support the existence of lottery gambling in BC	58%	59%
I support the existence of BCLC, the organization who oversees and conducts commercial gambling in BC	57%	58%
I feel better about legalized gambling in BC when I know there are responsible gambling programs in place	56%	62%
I support the existence of the legalized gambling industry in BC to generate revenue for the Province	54%	60%
I support the existence of legalized gambling in BC	53%	60%
I support the existence of casino gambling in BC	49%	57%
Legalized gambling benefits the community through creating jobs for British Columbians	49%	57%
Problem gambling is a significant issue in the Greater Victoria region	41%	N/A

Q. The next few questions ask about gambling in BC. By gambling we mean legalized activities such as lottery games, bingo, Chances/community gaming centres, casinos, and legal internet gambling. Please indicate how strongly you agree or disagree with each of the following statements using a scale of 1 to 7 where “1” means strongly disagree and “7” means strongly agree.

Base: All respondents



Significant higher/lower ($p < .05$)



WEIGHTED SAMPLE CHARACTERISTICS

	Total Sample (n=504)
Municipality	
Saanich	31%
Victoria	25%
Rest of region	44%
Age	
19 to 34 years	27%
35 to 54 years	35%
55+ years	40%
Gender:	
Female	53%
Male	47%
Facility Type (Q3)	
Casino	64%
Chances/Community Gaming Centre	34%
Bingo Hall	1%
Don't know/Refused	1%

	Total Sample (n=504)
Education	
High school or less	13%
Some post secondary	42%
University graduates	45%
Household Income	
Less than \$50,000	23%
\$50,000 to \$80,000	24%
\$80,000+	37%
Refused	16%
Employment	
Full-time	46%
Part-time	9%
Self-employed	8%
Retired	28%
Others	7%
Refused	2%



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