



Your Voice 2019, BCLC's Employee Survey Comprehensive Report

MARCH 2019

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Methodology and Response Rate



2019 is the 10th 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 February 20, 2019 and closed on March 6, 2019.



The overall response rate of 83% in 2019 is slightly lower than the past few waves (87% in 2018 and 88% in 2017).
Divisional response rates are indicated below:

Executive Services	Audit Services	Business Technology	Casino & Community Gaming	Digital & Enterprise Services	Finance & Corporate Services	Human Resources	Legal, Compliance & Security	Lottery Gaming	Social Responsibility & Communications
83%	100%	80%	80%	77%	85%	97%	99%	82%	77%
(n=10)	(n=10)	(n=165)	(n=154)	(n=67)	(n=104)	(n=29)	(n=82)	(n=93)	(n=106)

EVOLUTION OVER THE LAST 5 YEARS



Employee Engagement Index

% Agree
Top2Box

Engagement Index Score

83%

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

95% ↓

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

90%

The way BCLC operates is in alignment with its values

88% ↓

I understand how my role supports BCLC's strategy +

83%

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

82%

BCLC continuously innovates to provide players with an outstanding gaming experience

76% ↓

BCLC inspires me to do my best work

76%

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

73% ↓

YEAR (TOP2BOX)

2018

2017

2015

2014

(n=752)

(n=787)

(n=726)

(n=649)

86%

87% ↑

83%

78%

98%

98%

96%

96%

90%

93%

92% ↑

87%

92%

94% ↑

89% ↑

84%

86%

87%

90%

86%

83%

82% ↑

77%

73% ↓

83%

85% ↑

80%

78%

76%

76% ↑

67% ↑

58% ↓

80%

79% ↑

72% ↑

64%

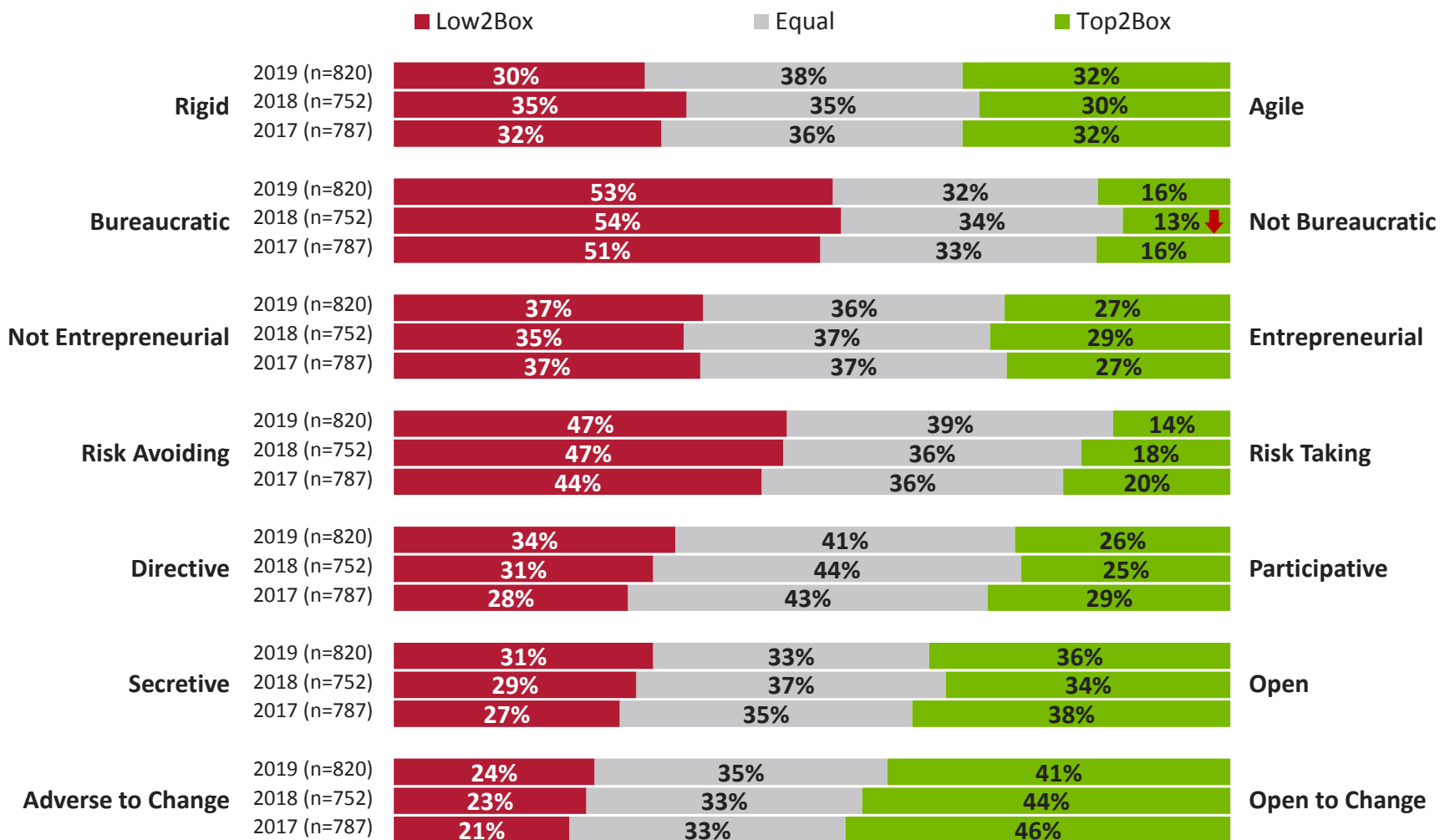
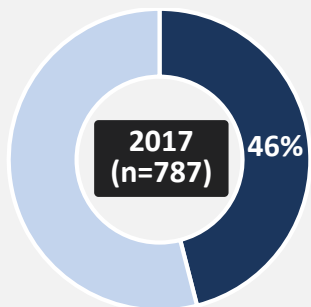
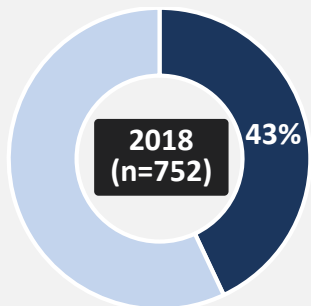
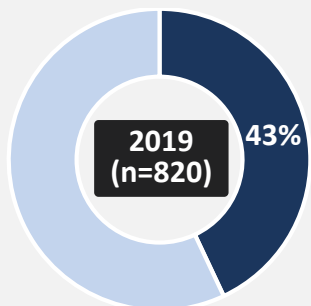
* Question text change in 2017: "I understand how my role supports BCLC's business objectives".

2019 Base: All respondents (n=820)

Please rate your agreement with the statements below...

Agility Index

Overall Agility Score



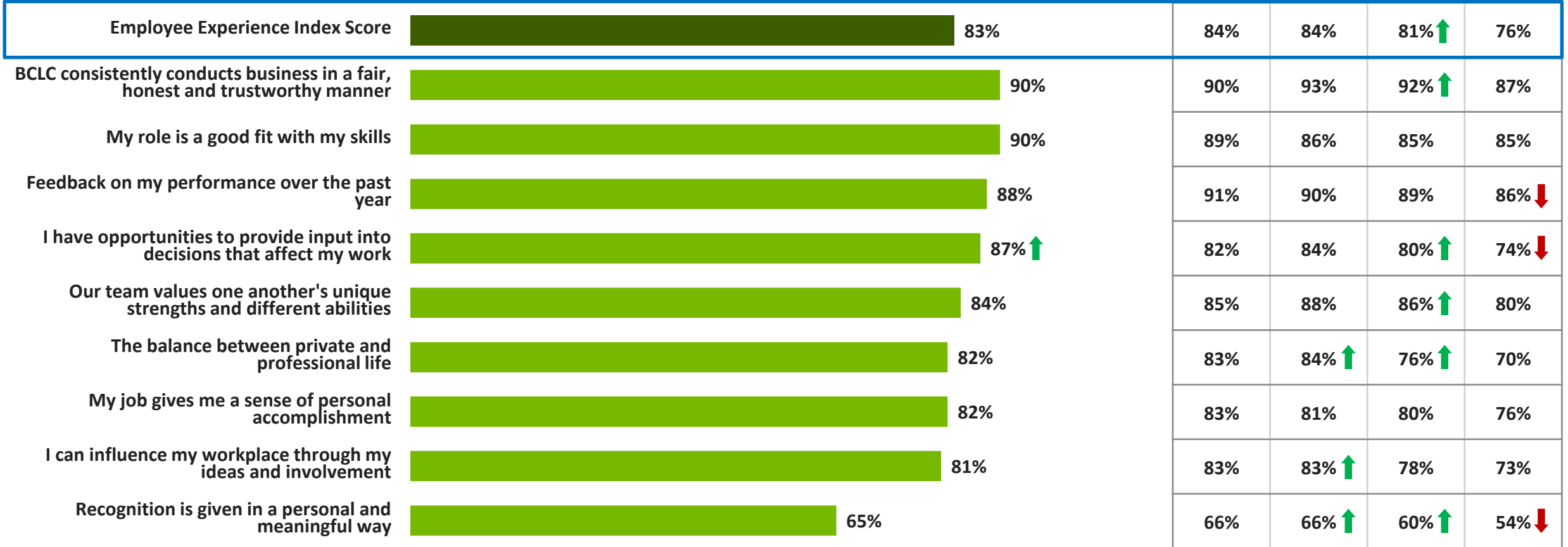
Base: All respondents

Please indicate the nature or style of management you feel exists within BCLC at the present time:

↑ ↓ Significantly higher/lower than the previous year.

Employee Experience Index

% Top2Box



2019 Base: Had formal performance review in past year (n=718)
How useful was the performance discussion on the following point?

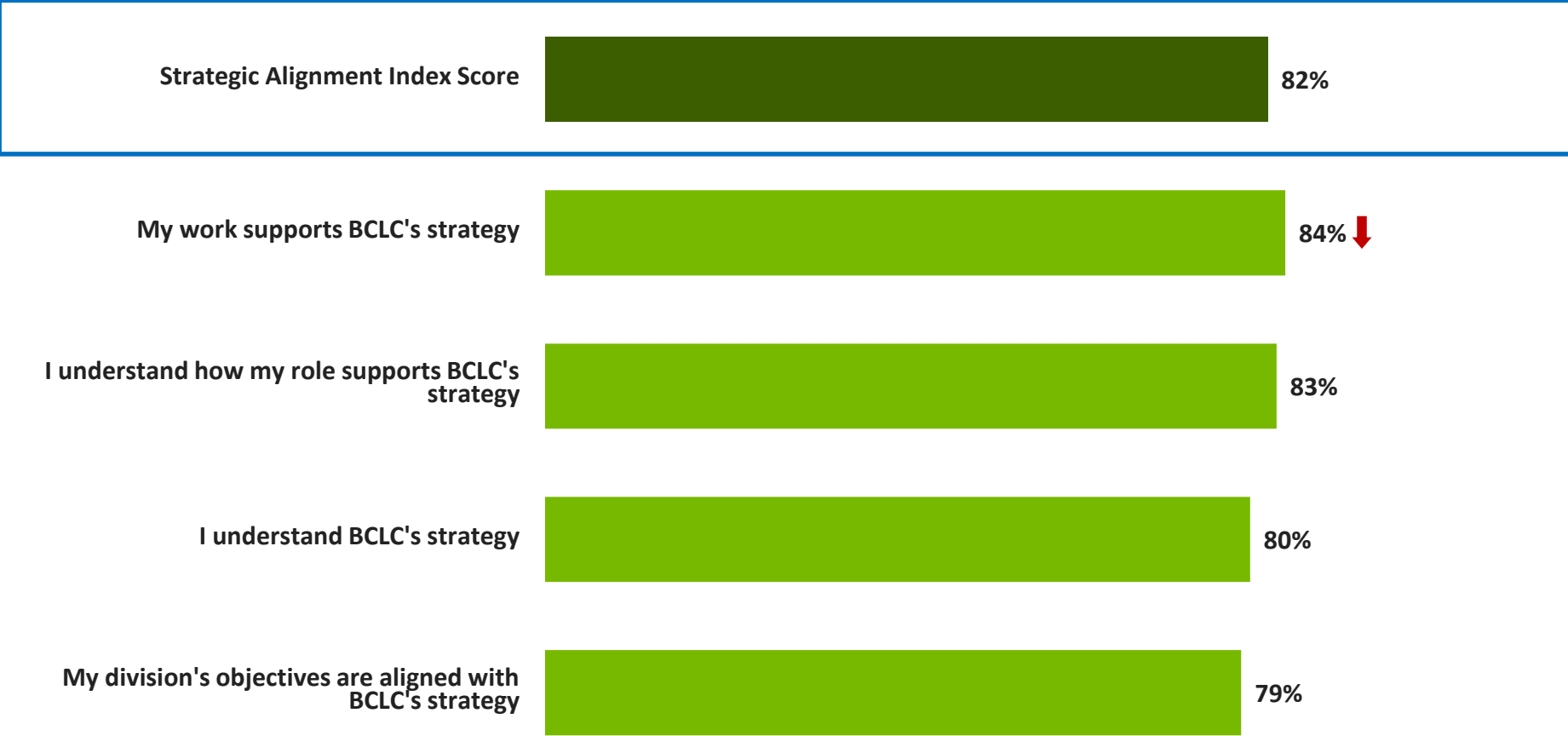
2019 Base: All respondents (n=820)
Please rate your agreement with the statements below./Please rate your satisfaction with the aspects of your job below.

↑ ↓ Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

Strategic Alignment Index



% Agree
Top2Box

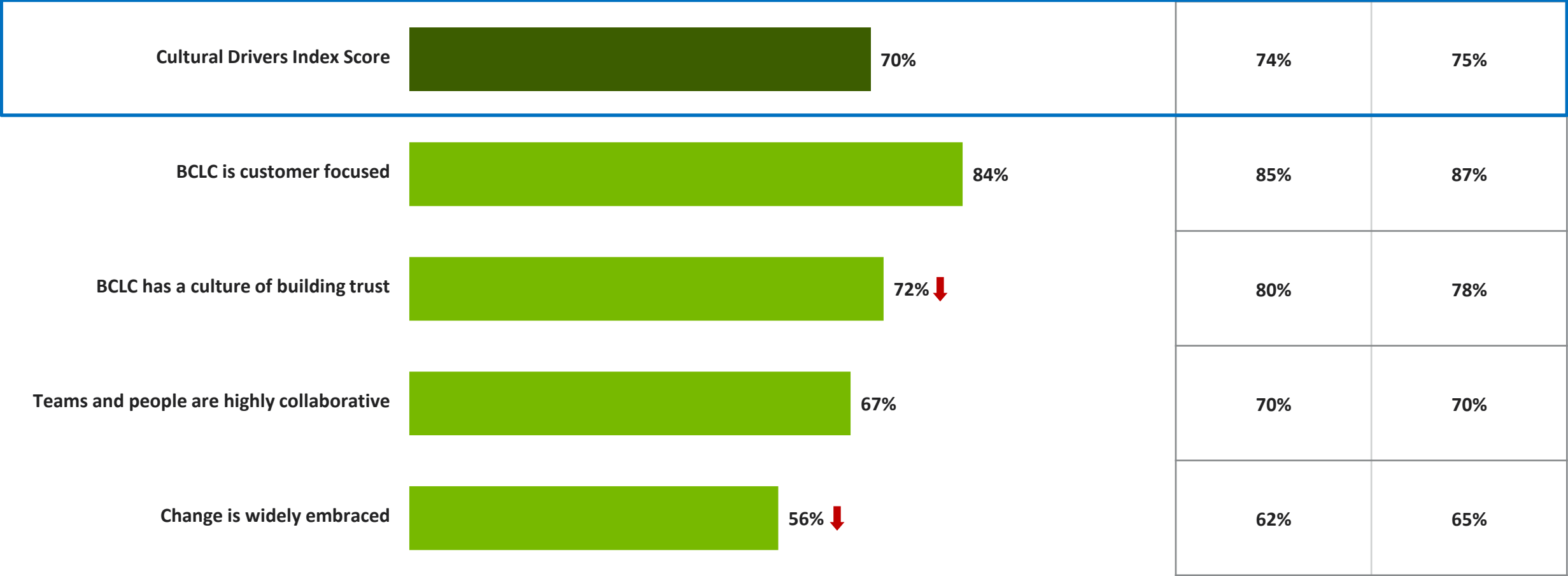


YEAR (TOP2BOX)	
2018	2017
(n=752)	(n=787)
85%	85%
89%	87%
86%	87%
84%	84%
82%	83%

Cultural Drivers Index

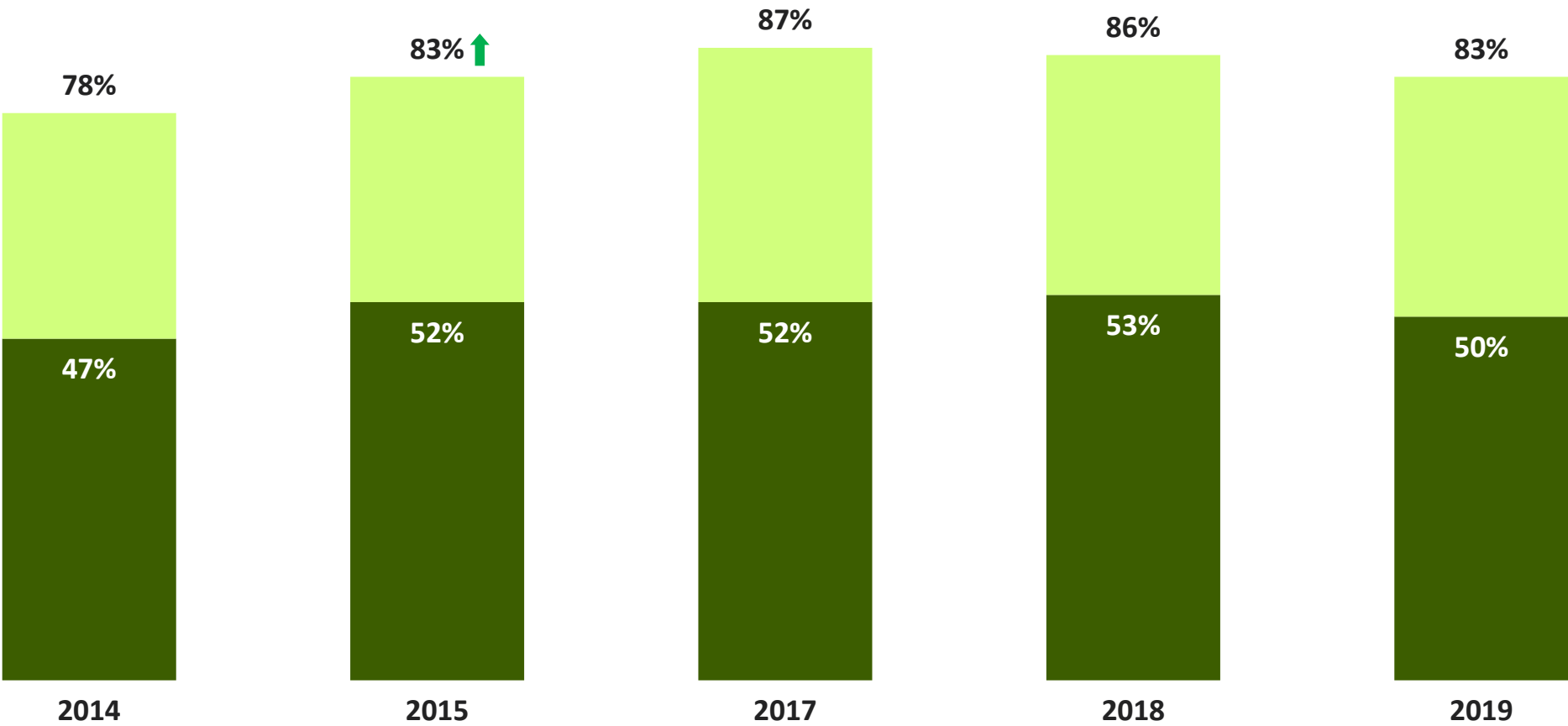
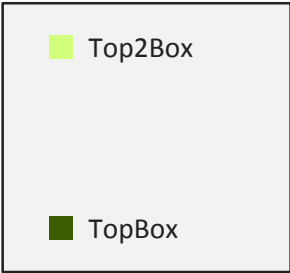


% Agree
Top2Box

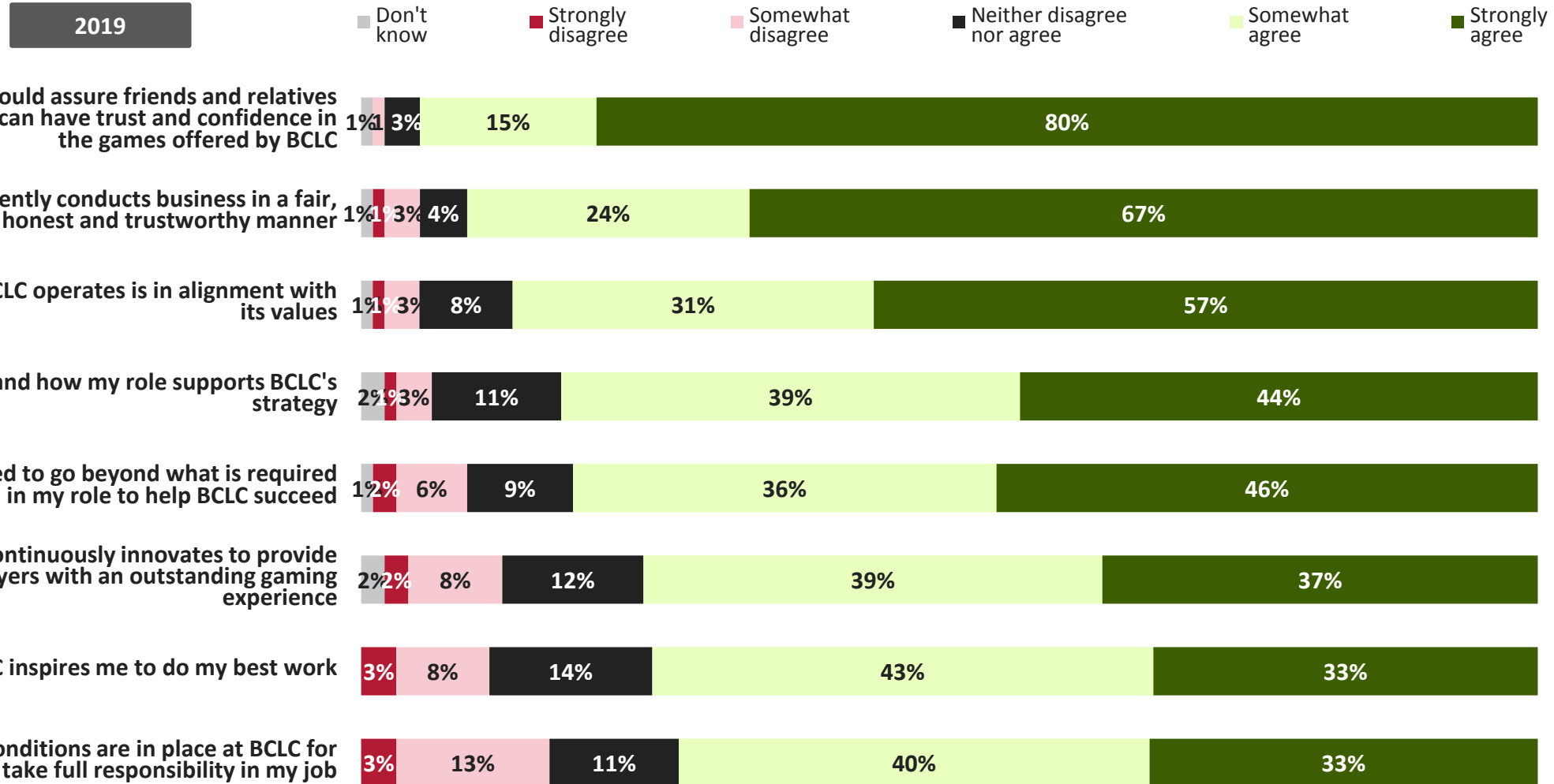


EMPLOYEE ENGAGEMENT ANALYSIS

Evolution of Employee Engagement Index

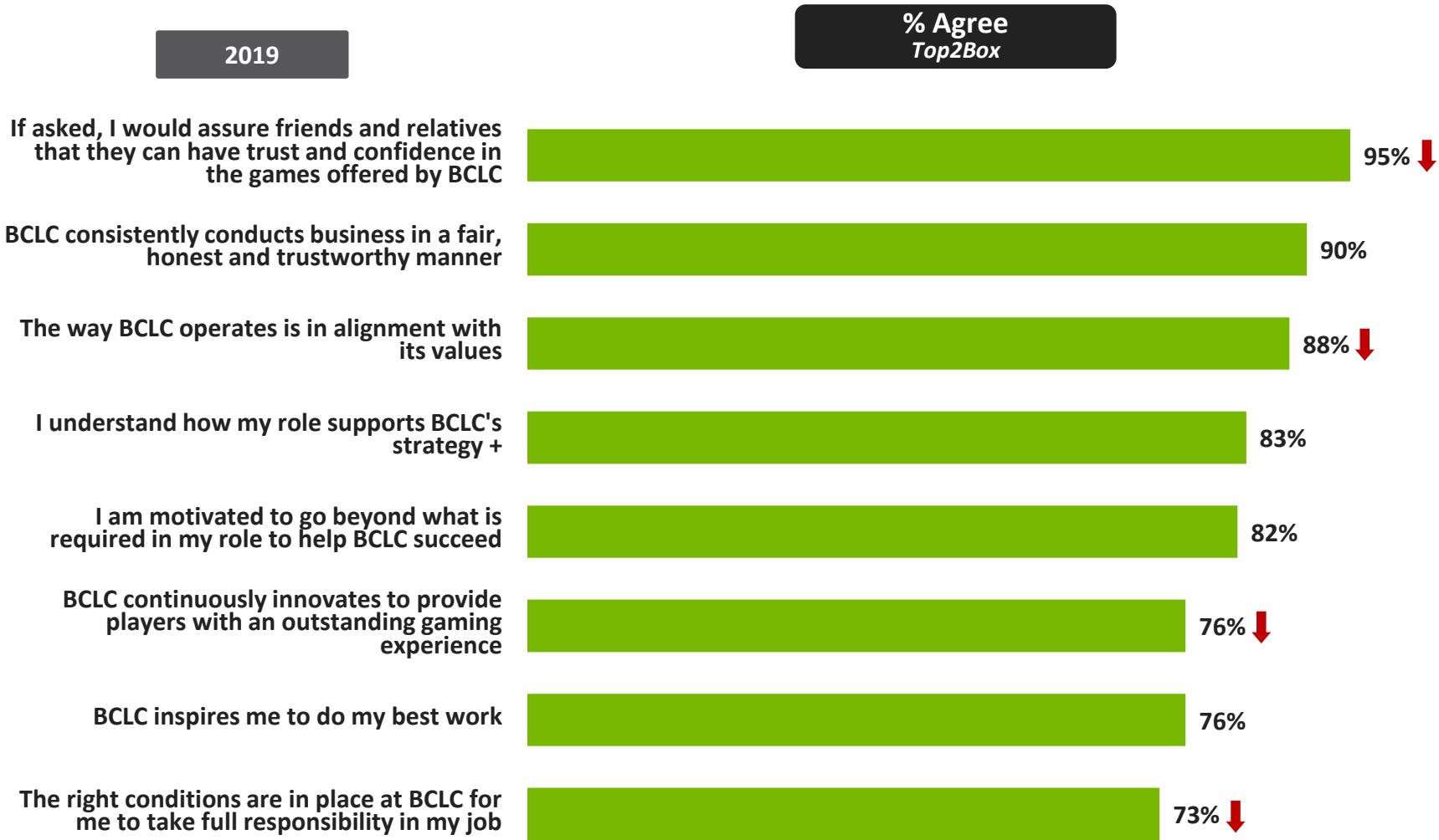


Employee Engagement Index Attributes - 2019



Base: All respondents (n=820)

Employee Engagement Index Attributes - Top2Box Trended



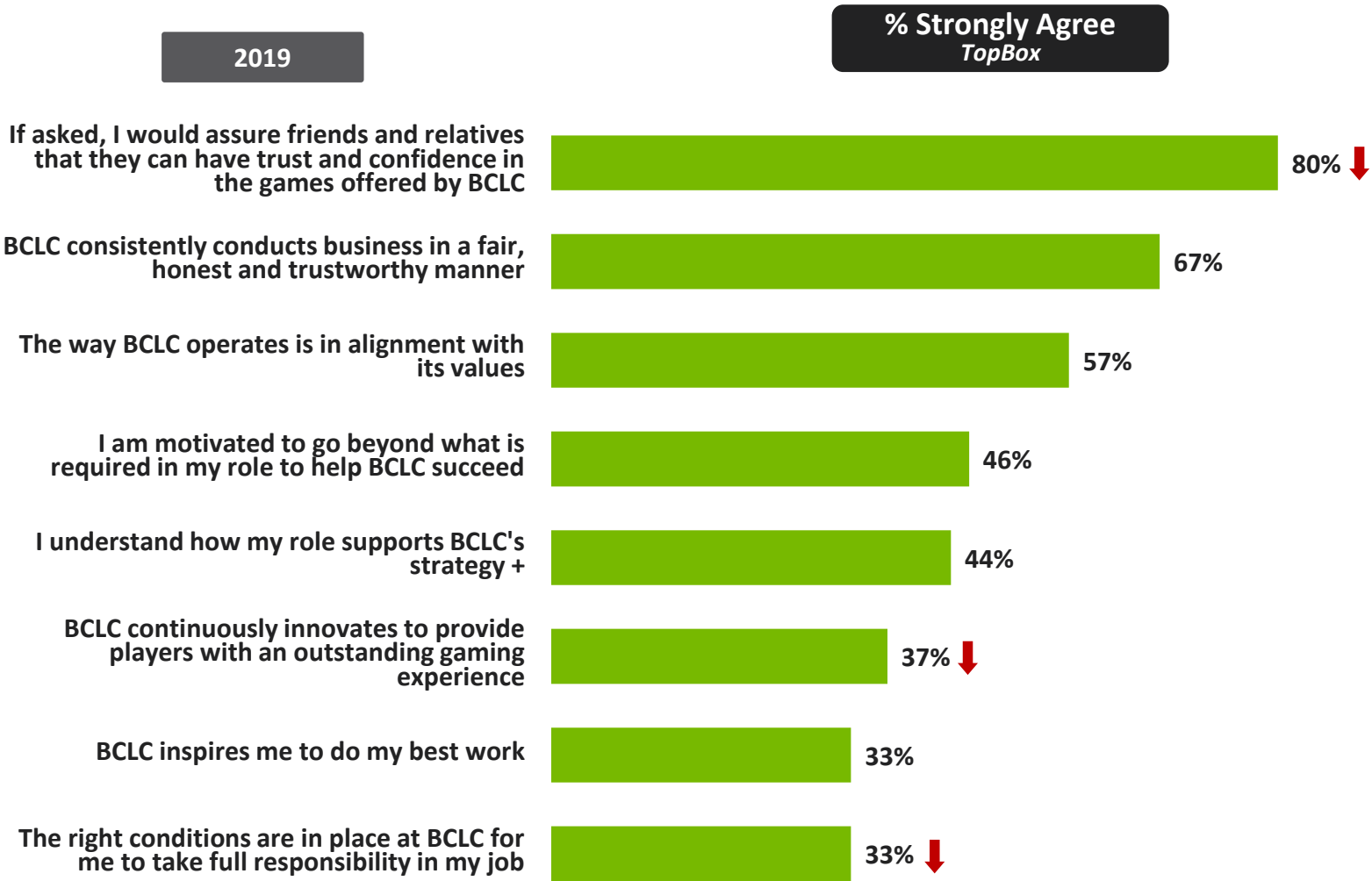
YEAR (TOP2BOX)			
2018	2017	2015	2014
(n=752)	(n=787)	(n=726)	(n=649)
98%	98%	96%	96%
90%	93%	92% ↑	87%
92%	94% ↑	89% ↑	84%
86%	87%	90%	86%
83%	82% ↑	77%	73% ↓
83%	85% ↑	80%	78%
76%	76% ↑	67% ↑	58% ↓
80%	79% ↑	72% ↑	64%

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

2019 Base: All respondents (n=820)

Please rate your agreement with the statements below...

Employee Engagement Index Attributes - TopBox Trended



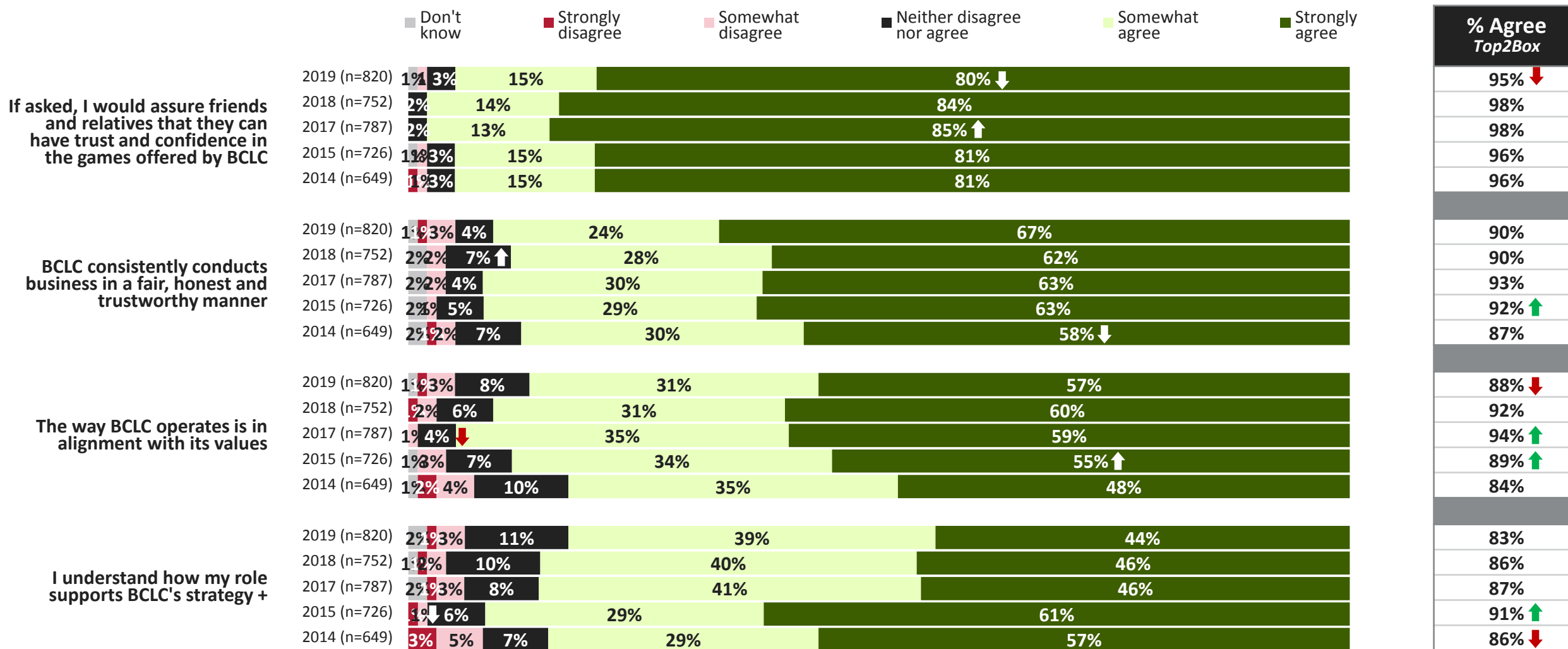
YEAR (TOPBOX)			
2018	2017	2015	2014
(n=752)	(n=787)	(n=726)	(n=649)
84%	85% ↑	81%	81%
62%	63%	63% ↑	58% ↓
60%	59%	55% ↑	48%
51%	50%	47% ↑	41%
46%	46%	61%	57%
48%	43%	41%	37% ↓
35%	32%	29% ↑	23% ↓
38%	38%	39% ↑	28% ↓

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

2019 Base: All respondents (n=820)

Please rate your agreement with the statements below...

Employee Engagement Index Attributes – Full Scale Trended



Base: All respondents

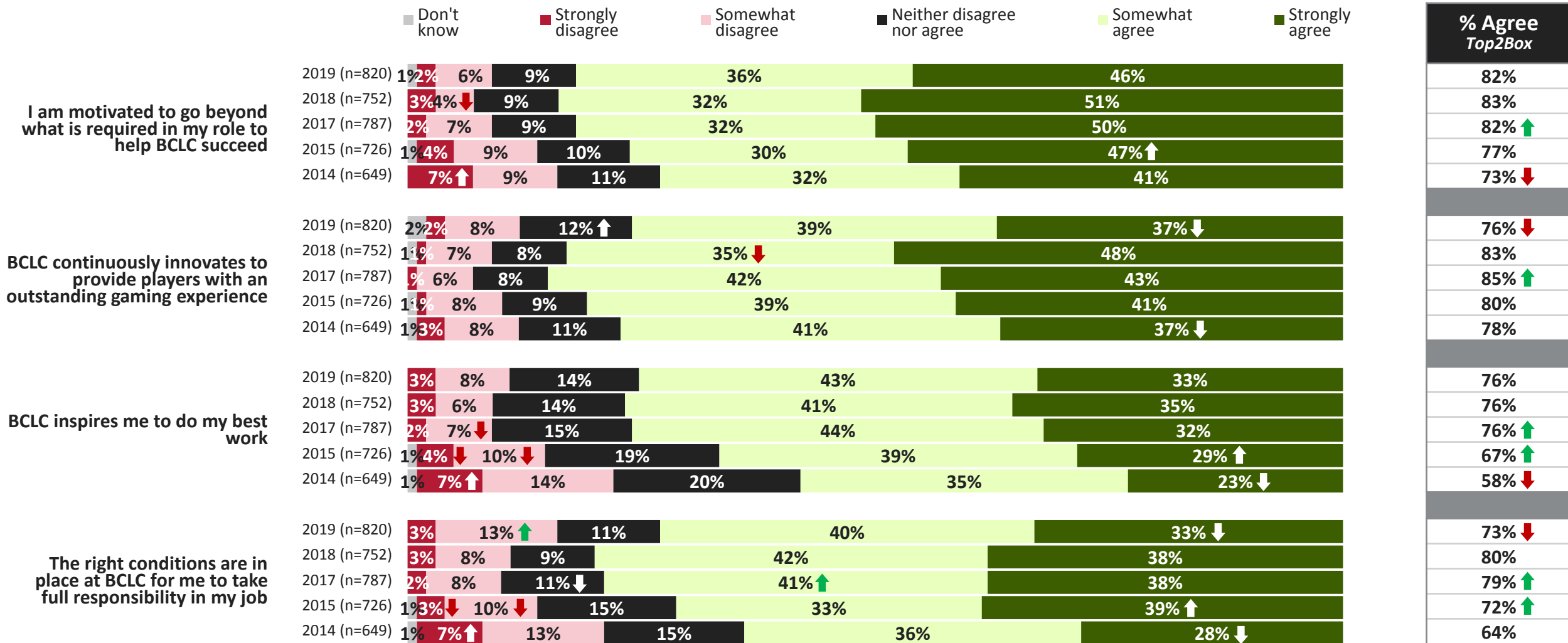
* Question text change in 2017: "I understand how my role supports BCLC's business objectives".

Please rate your agreement with the statements below...



Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

Employee Engagement Index Attributes – Full Scale Trended (continued)

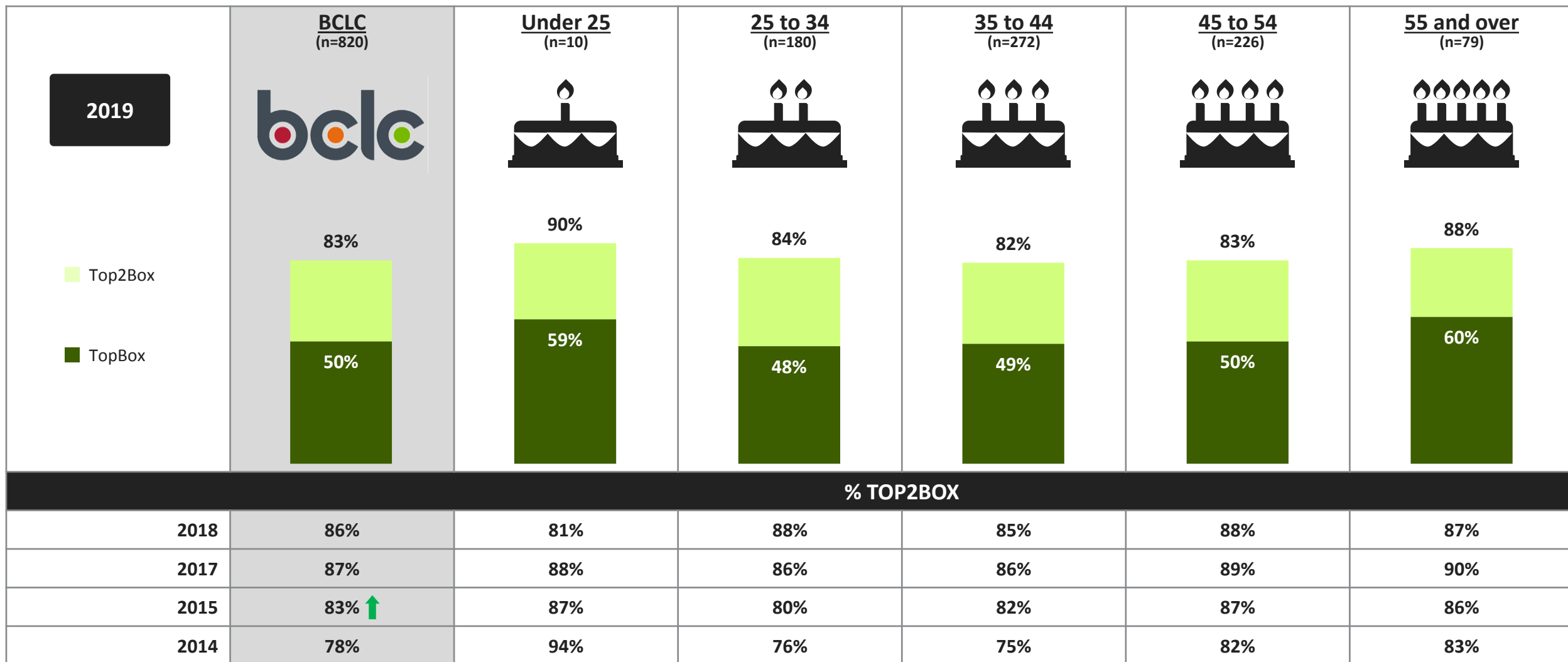


Base: All respondents

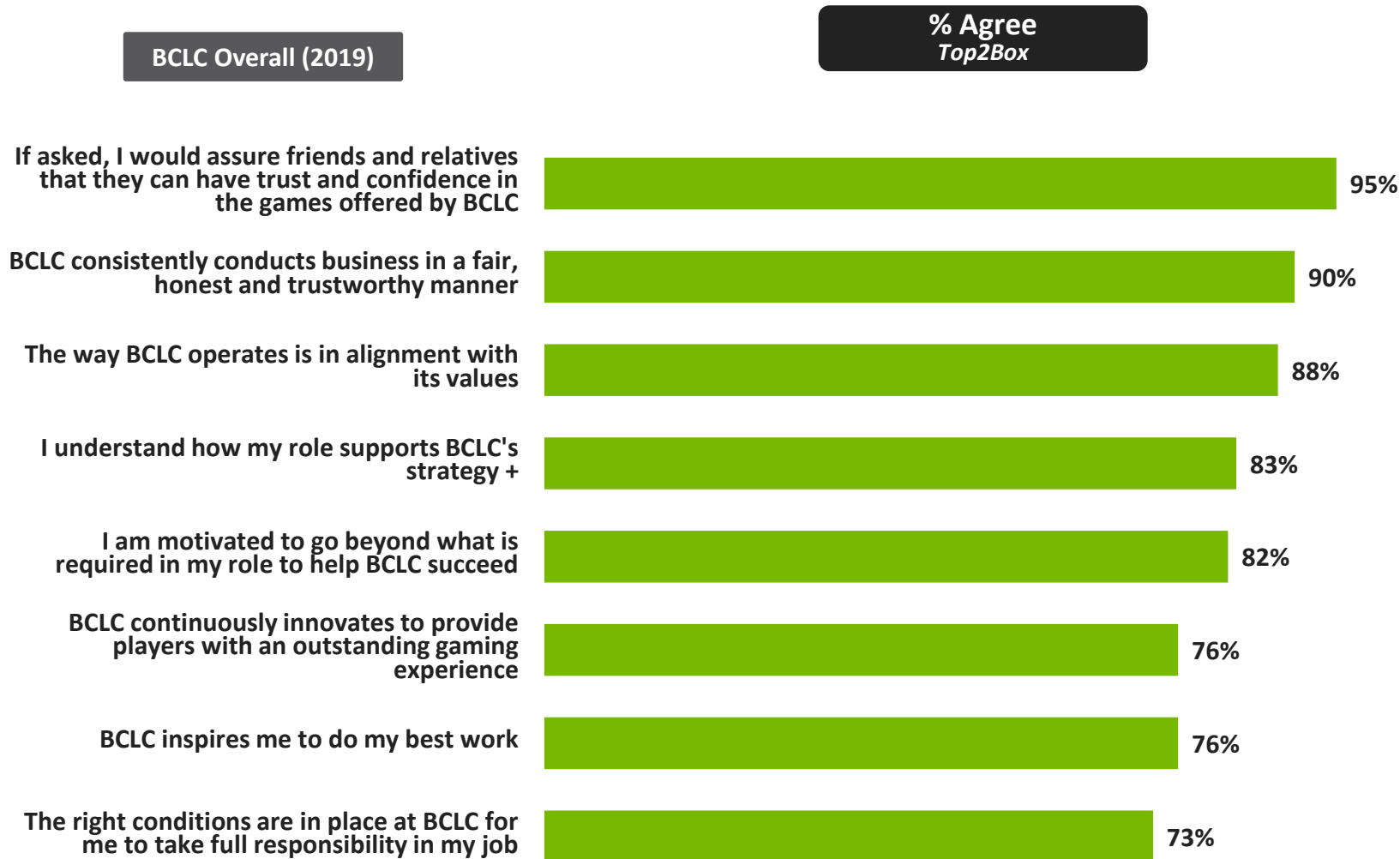
Please rate your agreement with the statements below...

Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

Employee Engagement Index by Age



Employee Engagement Index Attributes by Age



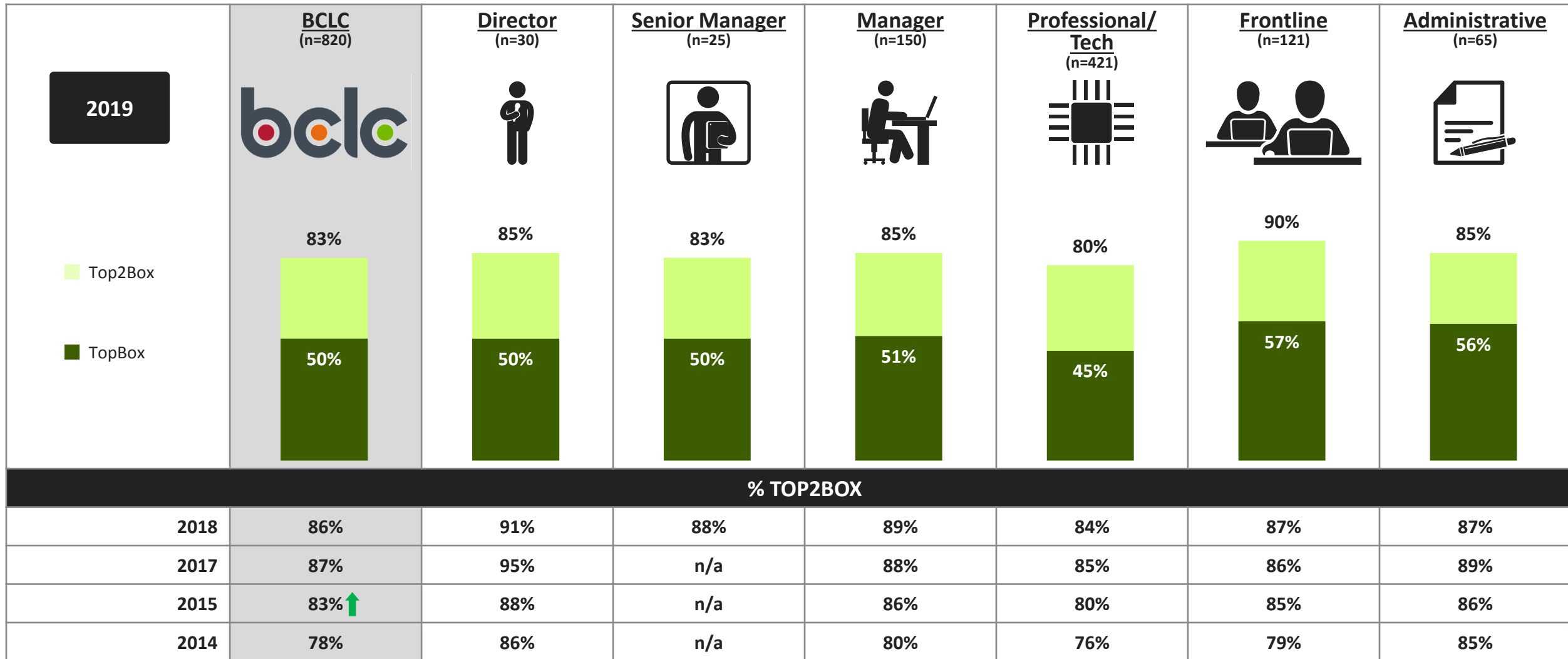
AGE (TOP2BOX)				
Under 25	25 to 34	35 to 44	45 to 54	55 and over
(n=10)	(n=180)	(n=272)	(n=226)	(n=79)
90%	93%	96%	95%	99%
90%	93%	89%	89%	96%
90%	90%	85%	89%	91%
100%	82%	84%	82%	90%
90%	83%	84%	82%	82%
90%	77%	72%	76%	86%
90%	77%	77%	75%	77%
80%	75%	71%	74%	79%

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

2019 Base: All respondents (n=820)

Please rate your agreement with the statements below...

Employee Engagement Index by Role

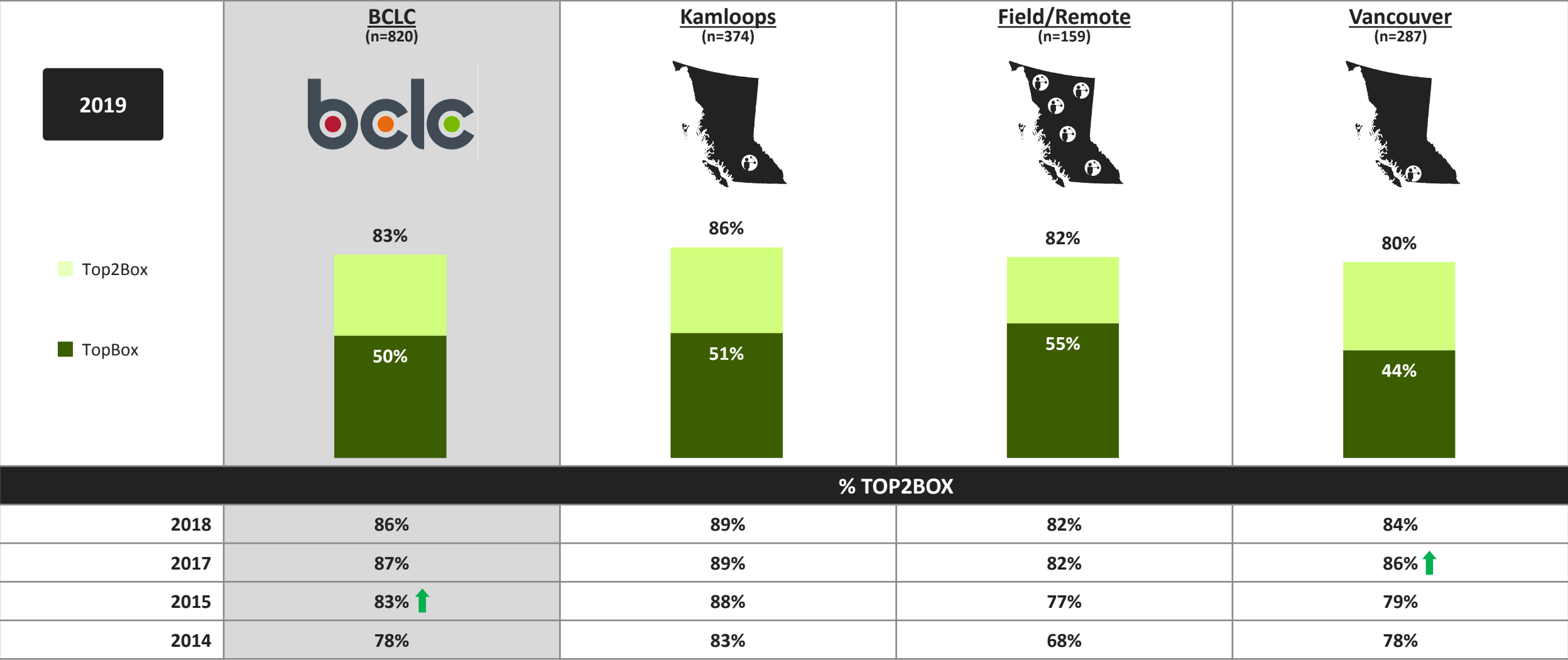


Note: Executive Leadership not shown due to small base size (n<10).

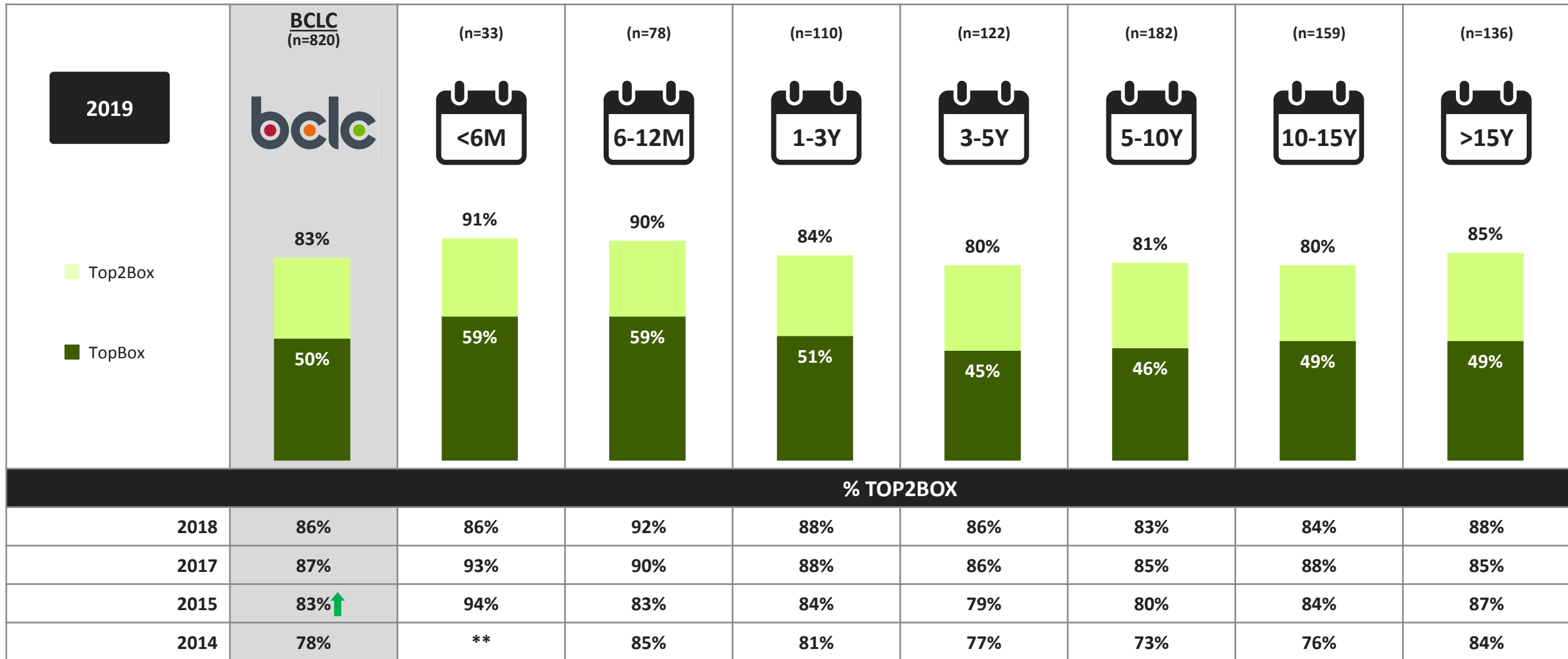
Note: 'Senior Manager' added in 2018, 'Manager' added in 2019.

↑ ↓ Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

Employee Engagement Index by Location



Employee Engagement Index by Tenure

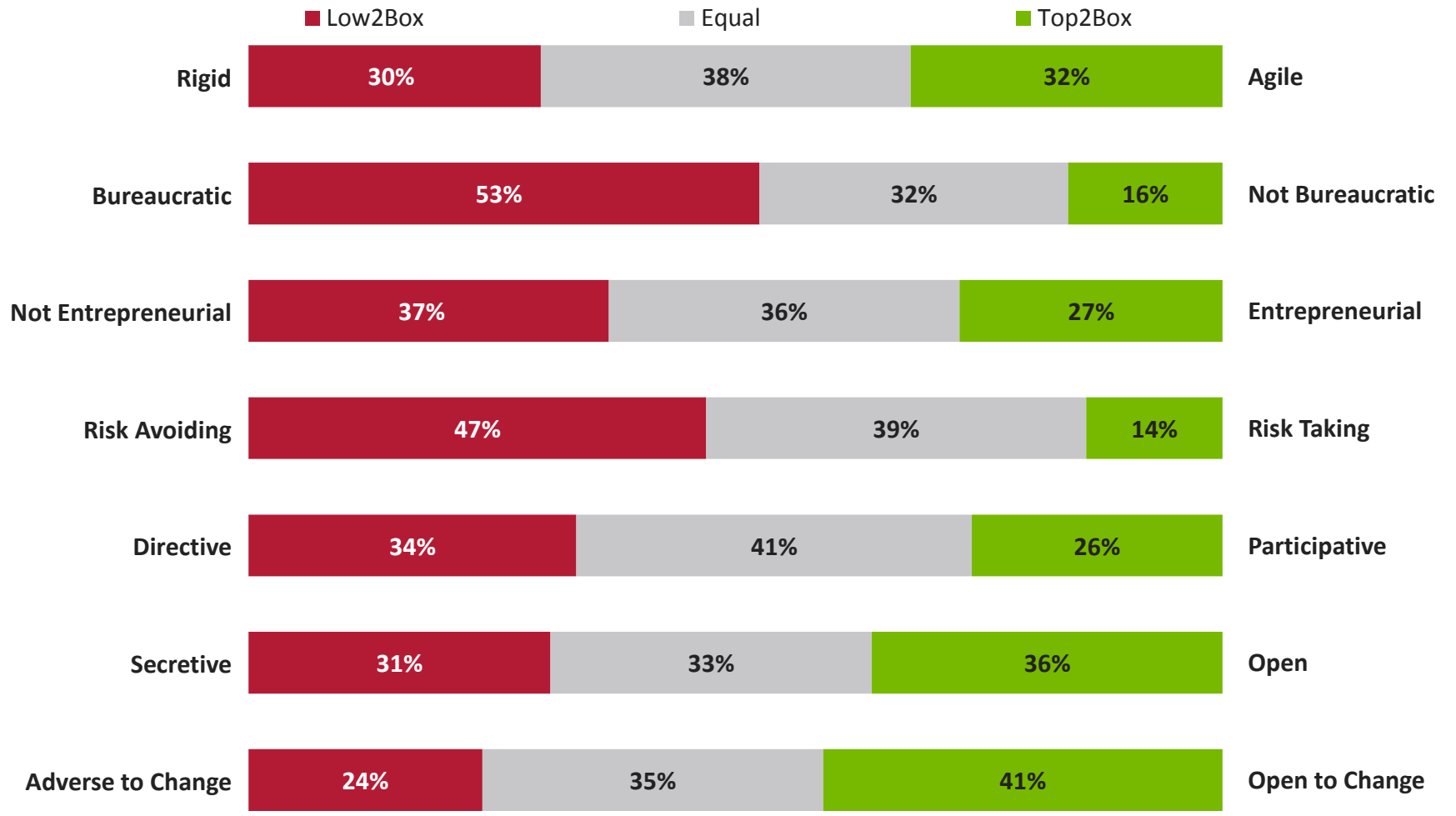
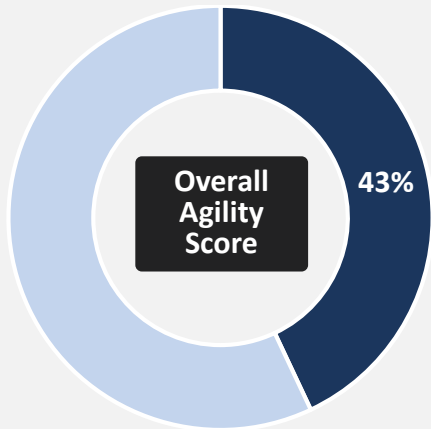




BCLC AGILITY INDEX

Agility Index: Total BCLC 2019

Total BCLC

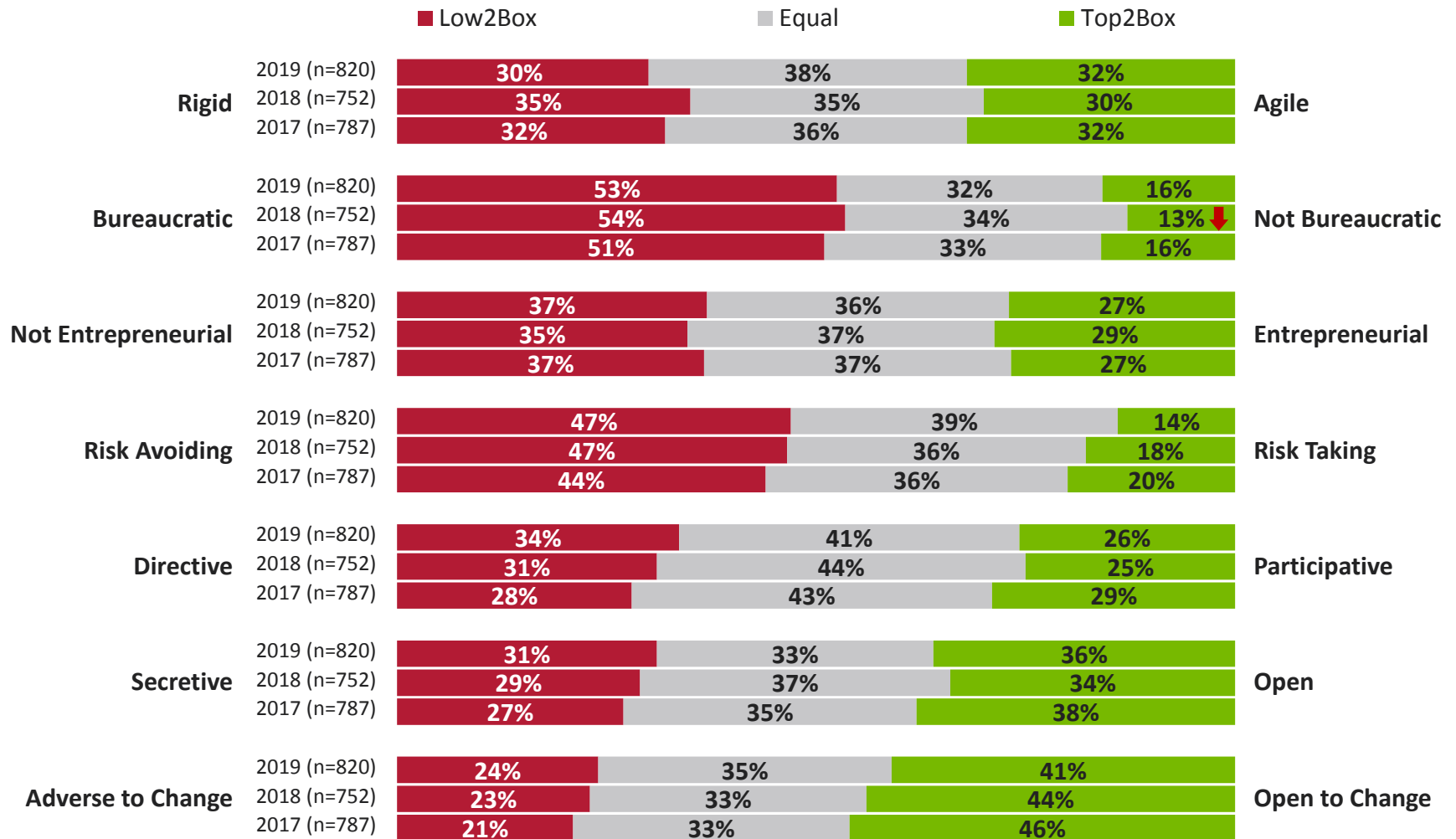
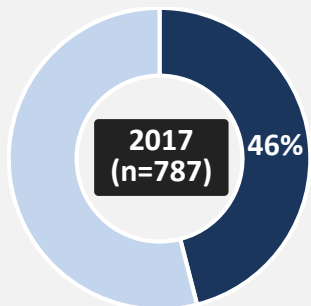
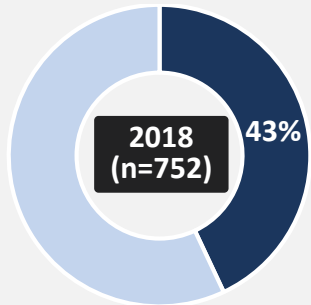
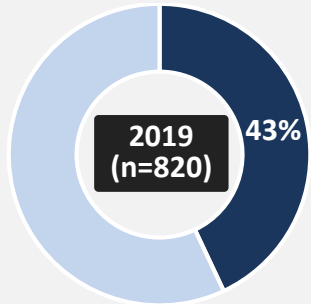


Base: All respondents (n=820)

Please indicate the nature or style of management you feel exists within BCLC at the present time:

Agility Index: Full Scale Trended

Overall Agility Score



Base: All respondents

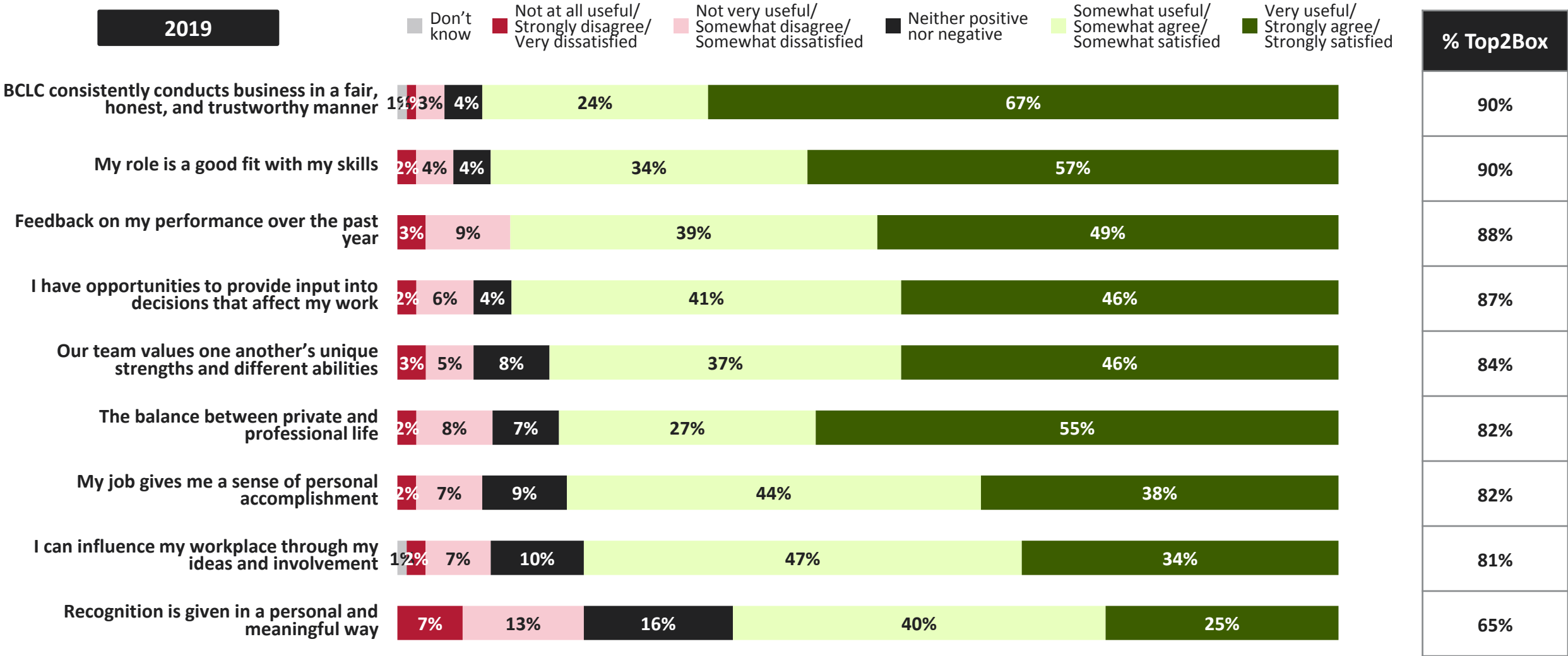
Please indicate the nature or style of management you feel exists within BCLC at the present time:

↑ ↓ Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

A man and a woman are in a meeting, looking at a whiteboard. The man is pointing at a sticky note on the whiteboard. The whiteboard has several sticky notes and diagrams, including a flowchart with the word "DESIGN" and a box labeled "interactive text".

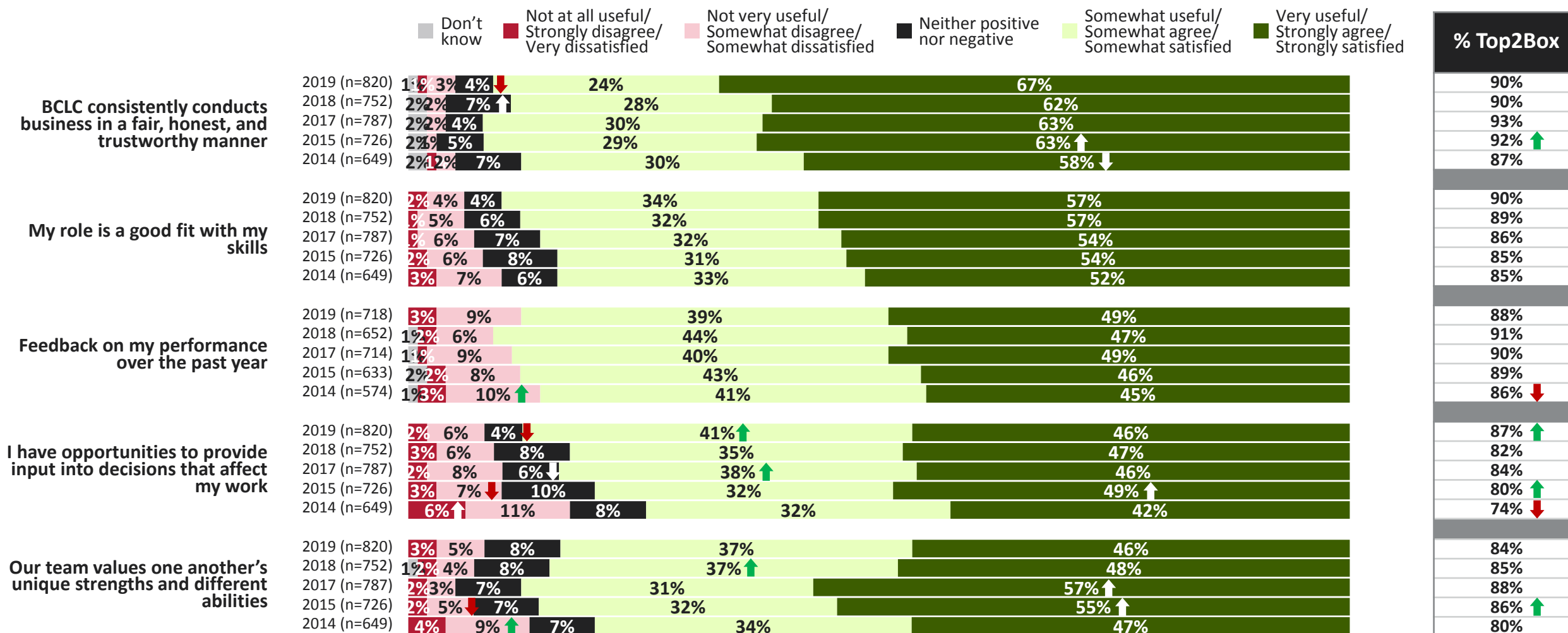
BCLC EMPLOYEE EXPERIENCE INDEX

Employee Experience Attributes – 2019



Base: All respondents (n=820)
Please rate your agreement with the statements below:/Please rate your satisfaction with the aspect of your job below:
Base: Had formal performance review in past 12 months (n=718)
How useful was the performance discussion on the following point?

Employee Experience Index Attributes – Full Scale Trended



Base: All respondents

Please rate your agreement with the statements below:/Please rate your satisfaction with the aspect of your job below:

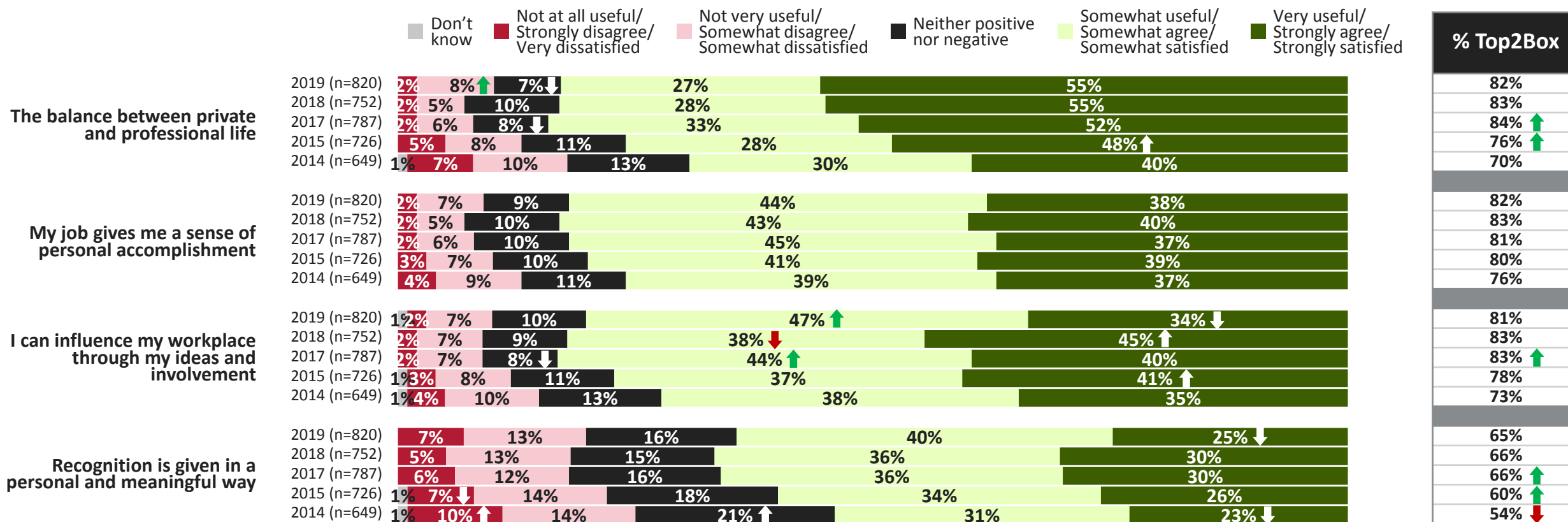
Base: Had formal performance review in past 12 months

How useful was the performance discussion on the following point?



Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

Employee Experience Index Attributes – Full Scale Trended (continued)



Base: All respondents

Please rate your agreement with the statements below:/Please rate your satisfaction with the aspect of your job below:

Base: Had formal performance review in past 12 months

How useful was the performance discussion on the following point?

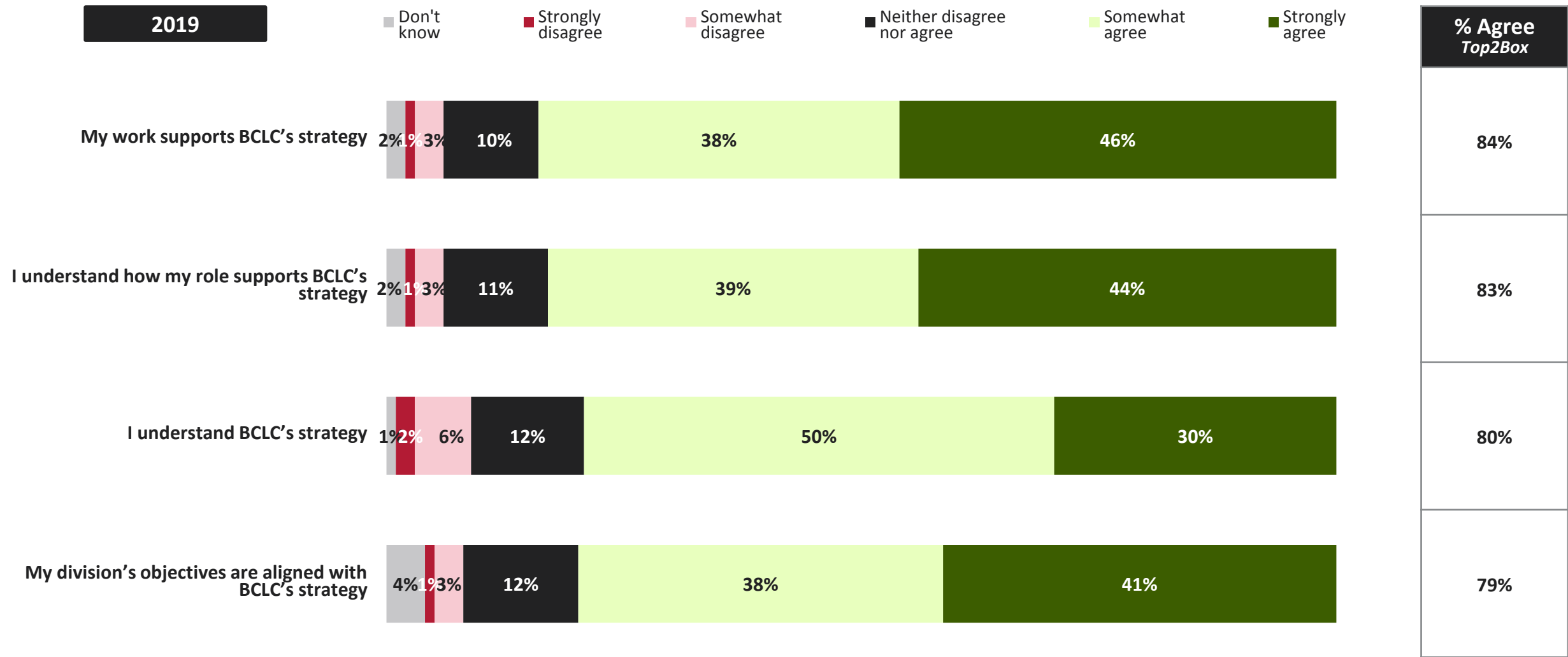


Significantly higher/lower than the previous year and meaningful difference of +/- 3PP or more.

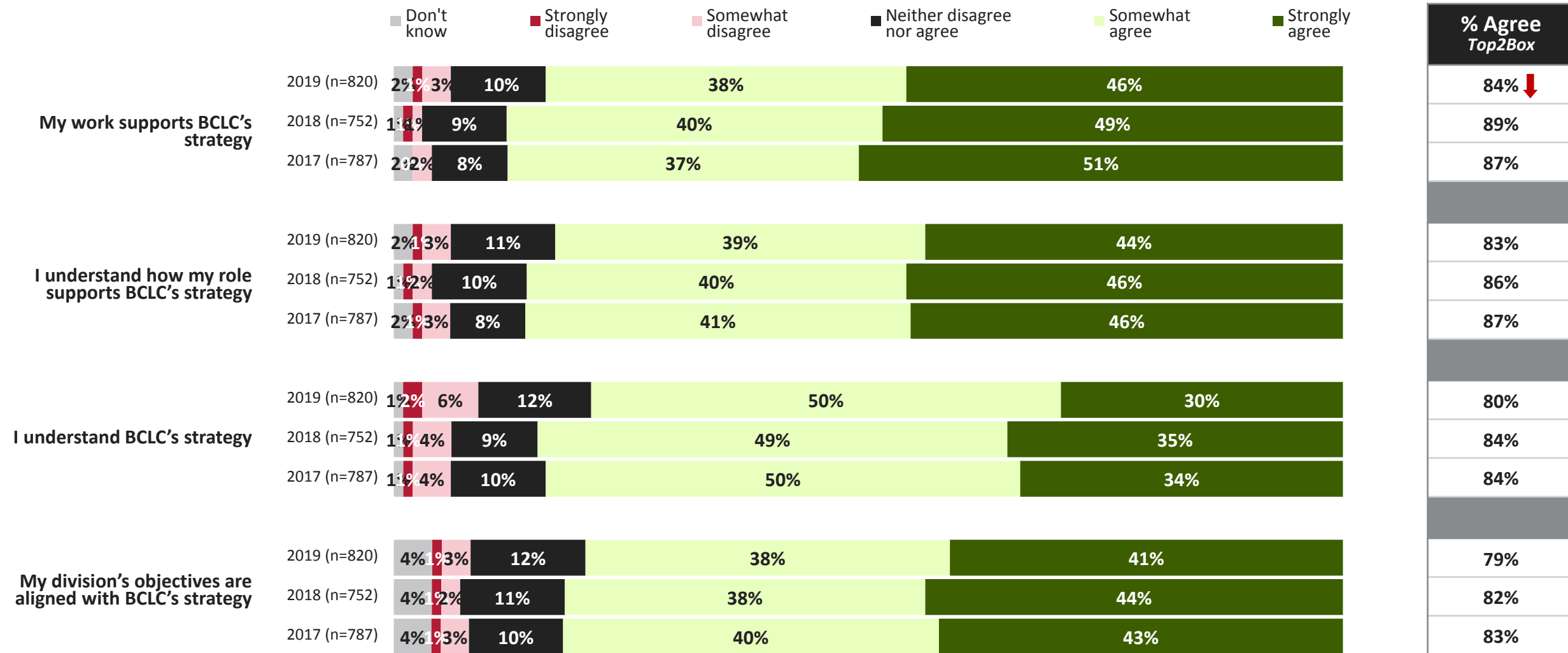


BCLC STRATEGIC ALIGNMENT INDEX

Strategic Alignment Index Attributes – 2019



Strategic Alignment Index Attributes – Full Scale Trended



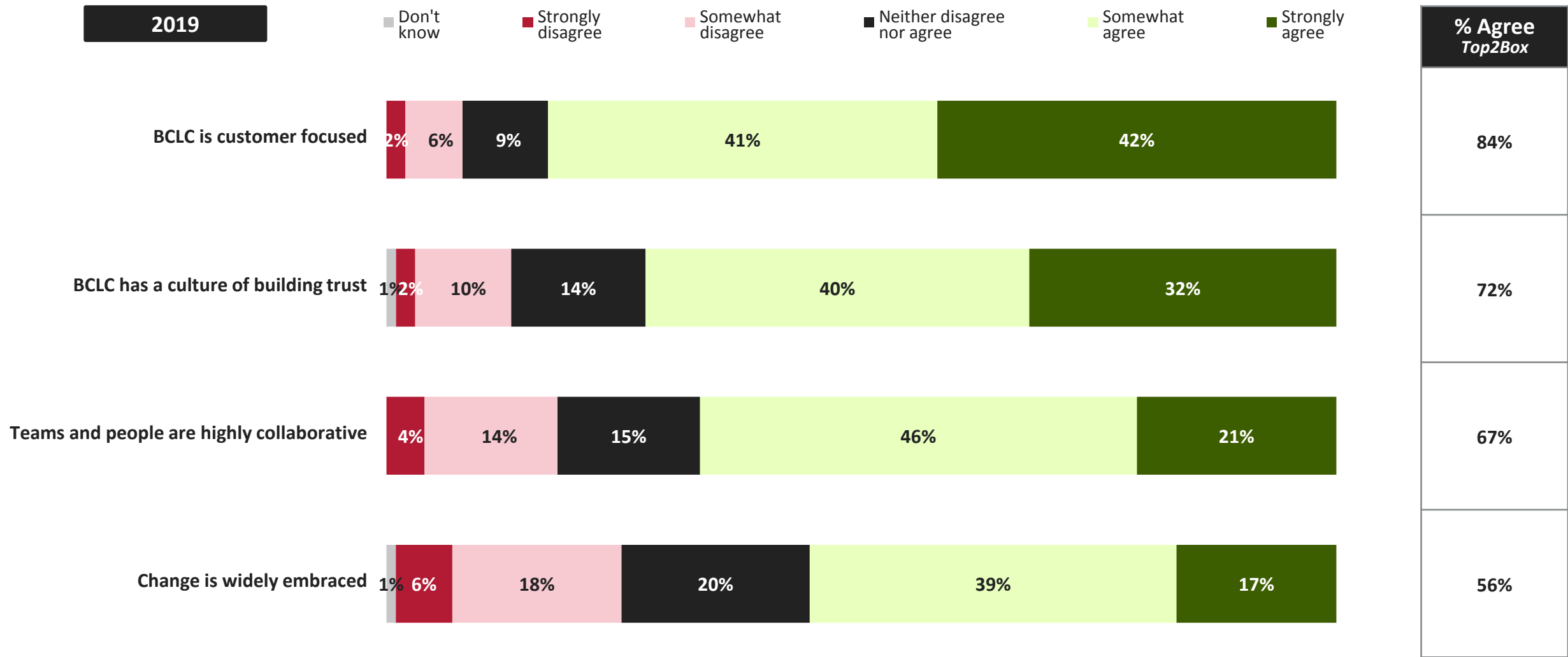
Base: All respondents

Please rate your agreement with the statements below...

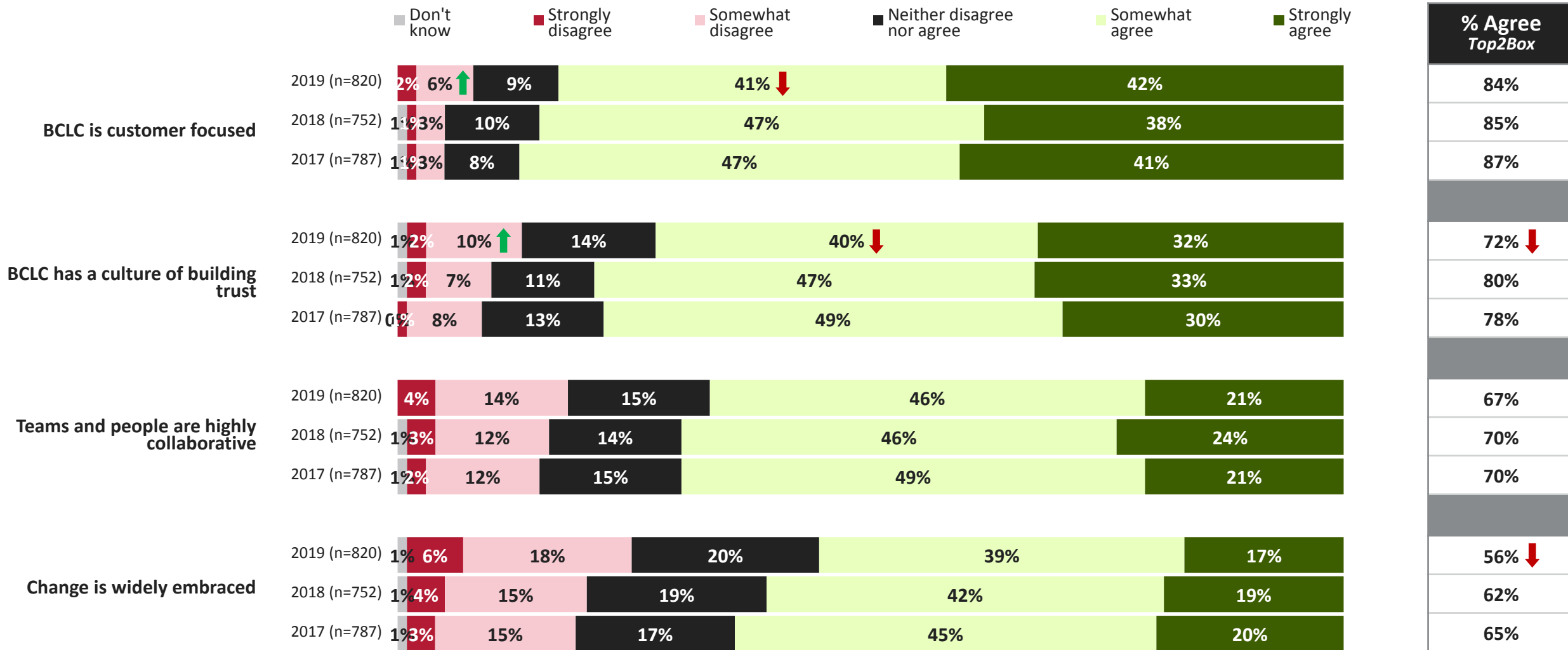


BCLC CULTURAL DRIVERS

Cultural Drivers Attributes – 2019



Cultural Drivers Attributes – Full Scale Trended



Base: All respondents

Please rate your agreement with the statements below...