

ONLINE GAMBLING DURING COVID SURVEY

Final Report

July 30, 2020



Background and Methodology

Just prior to the COVID-19 outbreak and resulting casino facility closures, under engagement by GPEB, Ipsos completed a study of gambling participation among 4,079 adult British Columbians (fielded Feb 4 to Mar 10, 2020). Approximately 1,800 respondents agreed at the end of the survey to be contacted about future research opportunities.

Ipsos contacted these 1,800 respondents by email to invite them to take part in a follow-up survey regarding their gambling participation during COVID restrictions. A total of 800 respondents took part in the follow-up survey fielded June 5 to 22, 2022.

The follow-up survey was conducted to help understand ...

- How gambling participation has changed as a result of the COVID related closures and to compare their responses to the Pre-COVID survey.
- Experiences related to isolation, loneliness and mental health resulting from COVID and related restrictions.

This report compares the responses of these 800 respondents pre-COVID and during COVID. The report includes data only from respondents who completed both surveys.

These data were weighted by age, gender and region to ensure the sample reflects actual Census data. In addition, these data were weighted to ensure pre-COVID participation in online gambling matched the original study.

Sample Composition: Online Gambling Participation

The final sample broke down as shown in the table below.

On a weighted basis, the largest part of the sample (65%) did not gamble online in either survey. Slightly more than three-in-ten (31%) gambled online in the COVID survey, an increase of 9 percentage points from the Pre-COVID survey (22%).

| | Number of Respondents | Unweighted % of Respondents | Weighted % of Respondents |
|-----------------------------------------------------|-----------------------|-----------------------------|---------------------------|
| Online gamblers in both Pre-COVID and COVID surveys | 148 | 19% | 18% |
| Online gamblers in Pre-COVID survey only | 36 | 5% | 4% |
| Online gamblers in COVID survey only | 99 | 12% | 13% |
| Not online gamblers in either survey | 517 | 65% | 65% |
| Total online gamblers in Pre-COVID survey | 184 | 23% | 22% |
| Total online gamblers in COVID survey | 247 | 31% | 31% |

Online Gambling Definition

The definition of an online gambler differs slightly in the two surveys based on the timeframe.

Pre-COVID Survey – An online gambler is anyone who bet or spent money online on any of the activities below in the past 12 months.

COVID Survey – An online gambler is anyone who bet or spent money online on any of the activities below since early March 2020, when COVID restrictions began.

Online Activities

- Charity raffles such as a hospital lottery
- Lottery games such as Lotto 6/49, BC 49, LOTTO MAX and others
- Scratch & Win games
- Keno
- Bingo
- Poker games or tournaments
- Slot machine games
- Casino table games (other than poker) such as blackjack, roulette, craps, etc.
- Other casino-type games
- Horse racing
- The outcome of sporting events (other than horse racing)
- The outcome of non-sports events
- Pull tabs
- Other games of skill such as cards, dice or dominoes
- Any other type of online gambling

Report Tables

A sample table from this report is shown below. Column definitions are as follows:

- **All Respondents**
 - Pre – The Pre-COVID survey responses of all 800 respondents.
 - COVID – The COVID survey responses of all 800 respondents.
- **All Online Gamblers**
 - Pre – The Pre-COVID survey responses of the 184 respondents who gambled online Pre-COVID.
 - COVID – The COVID survey responses of the 247 respondents who gambled online during COVID.
- **New Online Gamblers COVID** – The COVID survey responses of the 99 respondents who gambled online during COVID, but did not gamble online Pre-COVID. (Note, there were 36 respondents who gambled online Pre-COVID, but not during COVID. This sample size is too small to report.)

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|-------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Response 1 | % | % | % | % | % |
| Response 2 | % | % | % | % | % |
| Response 3 | % | % | % | % | % |

Q. *Question Text.*

Base: Who was asked the question (→ points to statistically higher result)

SUMMARY

Summary

1

Online gambling participation has increased during COVID. Three-in-ten (31%) respondents say they have bet or spent money on at least one online gambling activity since early March when COVID restrictions began. This is a 9-point increase from the 22% of respondents who reported online gambling in the 12 months prior to the Pre-COVID survey.

2

Increased online gambling is driven by three activities – lottery games, scratch & win games, and charity raffles. The biggest increase is a 10-point jump for lottery games (from 17% to 27% of all respondents), followed by a 6-point increase for scratch & win games (from 8% to 14%) and a 5-point increase for charity raffles (from 8% to 13%). Participation in all other online activities is with 2 percentage points of Pre-COVID levels among all respondents.

3

While the number of online gamblers has increased, the profile and behaviours of online gamblers has not changed during COVID. Compared to Pre-COVID, the demographic profile of online gamblers is unchanged. They have similar motivations for gambling (although the social motivation has declined). They gamble at the same time of day and for a similar amount of time. They make the same use of online responsible gamble tools as they did Pre-COVID. And among those with a PlayNow.com account, the share of online gambling going to PlayNow.com is unchanged.

Summary

4

There has been a directional, but not statistically significant, decrease in the proportion of moderate/high risk online problem gamblers. Three-in-ten (29%) COVID online gamblers classify as moderate or high risk on the Problem Gambling Severity Index (PGSI). This is decrease of 8-points from 37% Pre-COVID. The rate of moderate/high risk among new online gamblers (online during COVID but not in Pre-COVID survey) is even lower at 19%.

5

One of the few statistically significant changes is an increase in online gamblers who score Low on the Positive Play Pre Commitment Index. 45% of recent online gamblers scored Low on this index, an increase of 11-points from 34% Pre-COVID. The driver of this shift is a decrease in recent online gamblers who considered the time or money spent before gambling. There has been no change in the Gambling Literacy Index.

6

COVID has had a negative impact on the happiness, mental health and household finances of British Columbians, but the impacts are no better/worse for online gamblers. Nearly half of respondents say their mental health (46%) and household finances (46%) have deteriorated during COVID. The percentage of respondents rating their happiness as very high/high has declined 10-points (from 40% to 30%) compared to the Pre-COVID survey. On all these measures, the results among online gamblers are similar to respondents as a whole.

Summary

7

During COVID, online gamblers are more likely to have increased their consumption of alcohol, nicotine and legal drugs including cannabis. Online gamblers are 12-points higher than all respondents for increased alcohol consumption (37% vs. 25% among all respondents), 10-points higher for increased nicotine consumption (20% vs. 10% among all respondents) and 8-points higher for increased use of legal drugs including cannabis (17% vs. 9% among all respondents).

ONLINE GAMBLING ACTIVITY

Online Gambling Activities

Among all respondents, there has been a statistically significant increase in online participation in lottery games, scratch & win games and charity raffles. Overall participation in any type of online gambling has increased from 22% Pre-COVID to 31% COVID.

Among online gamblers, there have been statistical increases in online play of lottery games and scratch & win games, but there have been decreases in play of slot machine games, sporting events and pull-tabs. Newer online gamblers are less likely than online gamblers in general to have played slot machine games and other casino type games.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|-------------------------------------------------------------------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Lottery games such as Lotto 6/49, BC 49, LOTTO MAX and others | 17% | → 27% | 78% | → 87% | 83% |
| Scratch & Win games | 8% | → 14% | 34% | → 45% | 40% |
| Charity raffles such as a hospital lottery | 8% | → 13% | 37% | 42% | 42% |
| Slot machine games | 10% | 9% | 44% | ← 28% | ← 13% |
| Casino-type games (other than poker) such as blackjack, roulette, craps, etc. | 7% | 7% | 31% | 24% | 16% |
| Keno | 6% | 7% | 27% | 21% | 17% |
| Other casino-type games | 4% | 6% | 19% | 20% | ← 11% |
| Poker games or tournaments | 5% | 6% | 23% | 19% | 11% |
| Other games of skill such as cards, dice or dominoes | 4% | 5% | 18% | 18% | 14% |
| Bingo | 4% | 5% | 19% | 16% | 15% |
| The outcome of sporting events (other than horse racing) | 5% | 4% | 25% | ← 12% | 8% |
| The outcome of non-sports events | 4% | 4% | 16% | 12% | 6% |
| Horse racing | 2% | 3% | 11% | 10% | 7% |
| Pull tabs | 3% | 2% | 15% | ← 7% | 6% |
| Any other type of ONLINE gambling | 6% | 7% | 29% | 24% | 16% |
| At least one activity | 22% | → 31% | 100% | 100% | 100% |

Q11. (In the past 12 months) Since early March 2020, when COVID restrictions began, how OFTEN have you bet or spent money on each of the following gambling activities ONLINE?

11 Base: All respondents (→ points to statistically higher result)

Online Gambling Activities SUMMARY

Overall participation in any type of online gambling has increased a statistically significant amount from 22% Pre-COVID to 31% COVID. The incidence of online lottery/charity only play has doubled from 5% to 10%, while the percentage of those who play other online games has increased from 17% to 21%. Newer online gamblers are more likely than online gamblers in general to say they only play lottery/charity games, but the difference is not statistically significant.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|-------------------------------------------------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Played a lottery/charity game only | 5% | → 10% | 25% | 32% | 43% |
| Played at least one other (Non lottery/charity) game | 17% | → 21% | 75% | 68% | 57% |
| Total online gamblers | 22% | → 31% | 100% | 100% | 100% |

Q11. *(In the past 12 months) Since early March 2020, when COVID restrictions began, how OFTEN have you bet or spent money on each of the following gambling activities ONLINE?*

Base: All respondents (→ points to statistically higher result)



PlayNow.com Accounts (Revised Question)

Three-quarters (73%) of COVID online gamblers say they have a PlayNow.com account, including 10% who say they opened an account since COVID restrictions began. This is statistically lower than the 83% of online gamblers who said they had a PlayNow.com account in the Pre-COVID survey.

A majority (56%) of new online gamblers say they have a PlayNow.com account, including 17% who say they opened an account since COVID restrictions began. Four-in-ten (39%) new online gamblers say they already had an account.

| | All Online Gamblers | | New Online Gamblers |
|---------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| Yes, I had a PlayNow.com account prior to COVID restrictions | n/a | 63% | ← 39% |
| Yes, I opened a PlayNow.com since COVID restrictions began | n/a | 10% | 17% |
| No | n/a | 25% | → 41% |
| Don't know/Refused | n/a | 2% | 3% |
| Have PlayNow.com Account | 83% | ← 73% | ← 56% |

Q14. *Are you registered on PlayNow.com, BCLC's (legal) internet gambling website?*

Base: Online gamblers (→ points to statistically higher result)

PlayNow.com Usage (Among Online Gamblers Registered on PlayNow.com)

PlayNow.com's share of online gambling (among online gamblers with an account) has not shifted. About seven-in-ten in both the Pre-COVID survey (74%) and COVID survey (71%) say they do all or most of their online gambling on PlayNow.com. New online gamblers are statistically less likely to do all/most on PlayNow.com, but there are not enough new online gamblers to shift the overall share by a statistically significant amount.

| | All Online Gamblers | | New Online Gamblers |
|--------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 146 | 183 | 55 |
| All of it was done on PlayNow.com | 59% | 50% | 47% |
| Most of it was done on PlayNow.com | 15% | 21% | ← 8% |
| About half of it was done on PlayNow.com | 11% | 14% | 25% |
| Most of it was done on other online sites | 5% | 2% | 0% |
| All of it was done on other online sites | 5% | 9% | 12% |
| Don't know/Refused | 4% | 5% | 7% |
| All/Most on PlayNow.com | 74% | 71% | ← 55% |
| Most/All on other online sites | 10% | 11% | 12% |

Q15. (In the past 12 months) Since COVID restrictions began, what portion of your online gambling was done on BCLC's PlayNow.com website?

Base: Online gamblers registered on PlayNow.com (→ points to statistically higher result)

DEMOGRAPHICS

Demographics

The regional, gender and age profiles of the overall samples have not changed between the two surveys because they are the same people. There are also no statistical shifts in the demographic profile of Pre-COVID and COVID online gamblers.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|----------------------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Regional Health Authority | | | | | |
| Fraser | 36% | 36% | 36% | 37% | 44% |
| Vancouver Coastal | 25% | 25% | 32% | 29% | 22% |
| Interior | 17% | 17% | 13% | 15% | 17% |
| Vancouver Island | 16% | 16% | 13% | 13% | 11% |
| Northern | 5% | 5% | 5% | 5% | 6% |
| Gender | | | | | |
| Male | 49% | 49% | 60% | 60% | 56% |
| Female | 51% | 51% | 40% | 40% | 44% |
| Other | <1% | <1% | 0% | 0% | 0% |
| Age | | | | | |
| 19 - 24 | 6% | 6% | 5% | 5% | 6% |
| 25 - 34 | 22% | 21% | 30% | 25% | ← 14% |
| 35 - 44 | 14% | 14% | 17% | 15% | 15% |
| 45 - 54 | 20% | 19% | 21% | 22% | 25% |
| 55 - 64 | 18% | 18% | 12% | 14% | 17% |
| 65+ | 22% | 22% | 15% | 18% | 23% |

Base: All respondents (→ points to statistically higher result)

Demographics

The profile of Pre-COVID and COVID online gamblers is unchanged by education, income and employment.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|-------------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Education | | | | | |
| High School or less | 16% | 16% | 13% | 15% | 18% |
| Some college/university | 44% | 44% | 41% | 45% | 50% |
| University graduate | 40% | 40% | 45% | 40% | 33% |
| Household Income | | | | | |
| <\$40k | 19% | 19% | 19% | 18% | 15% |
| \$40-<\$70K | 25% | 25% | 28% | 29% | 29% |
| \$70-<\$100K | 24% | 24% | 27% | 27% | 29% |
| \$100K+ | 26% | 26% | 22% | 22% | 22% |
| Prefer not to answer | 7% | 7% | 4% | 4% | 6% |
| Employment | | | | | |
| Employed full-time | 44% | 44% | 49% | 48% | 49% |
| Employed part-time | 10% | 10% | 15% | 12% | 8% |
| Self employed | 8% | 8% | 10% | 8% | 6% |
| Not employed | 8% | 8% | 6% | 7% | 7% |
| Retired | 22% | 22% | 13% | 17% | 23% |
| Other | 9% | 9% | 7% | 8% | 6% |

Base: All respondents (→ points to statistically higher result)

Demographics

The profile of Pre-COVID and COVID online gamblers is unchanged by marital status or children in household.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|--------------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Marital Status | | | | | |
| Married | 45% | 45% | 45% | 47% | 50% |
| Living with partner | 15% | 15% | 10% | 12% | 14% |
| Single, never married | 26% | 26% | 33% | 29% | 23% |
| Divorced or separated | 11% | 11% | 9% | 8% | 9% |
| Widowed | 3% | 3% | 4% | 4% | 4% |
| Kids in Household | | | | | |
| Yes | 21% | 21% | 28% | 25% | 23% |
| No | 79% | 79% | 72% | 75% | 77% |

Base: All respondents (→ points to statistically higher result)

COVID IMPACTS

General Health

Both the overall population and online gamblers report better personal health in the COVID survey than in the Pre-COVID survey. The likely explanation is that health in a period of COVID is defined differently than Pre-COVID – for example, not having COVID symptoms is presumably a big factor in a positive rating.

New online gamblers are consistent with online gamblers in general in their assessments of their general health.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|----------------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Excellent | 8% | → 16% | 4% | → 9% | 13% |
| Very good | 32% | 36% | 28% | → 38% | 39% |
| Good | 36% | ← 31% | 37% | 35% | 29% |
| Fair | 19% | ← 12% | 25% | ← 14% | 13% |
| Poor | 6% | 4% | 5% | 4% | 6% |
| Excellent/Very good | 39% | → 52% | 32% | → 47% | 52% |
| Fair/Poor | 25% | ← 16% | 30% | ← 18% | 18% |

Q2. (Over the past 12 months) Since early March 2020, when COVID restrictions began would you say that in general your health has been ...?

Base: All respondents (→ points to statistically higher result)

Overall Happiness

While the trend in general health is positive, the trend is negative for personal happiness, both for the total population and for online gamblers.

New online gamblers are consistent with online gamblers in general in terms of their levels of happiness.

| | All Respondents | | All Online Gamblers | | New Online Gamblers |
|-----------------------|-----------------|-------|---------------------|-------|---------------------|
| | Pre | COVID | Pre | COVID | COVID |
| Sample Size | 800 | 800 | 184 | 247 | 99 |
| Very high | 8% | ← 4% | 7% | 6% | 5% |
| High | 33% | ← 26% | 31% | ← 20% | 26% |
| Moderate | 46% | → 51% | 46% | 49% | 48% |
| Low | 10% | → 15% | 11% | → 21% | 17% |
| Very low | 4% | 3% | 5% | 5% | 4% |
| Very high/High | 40% | → 30% | 38% | → 26% | 31% |
| Low/Very low | 14% | → 19% | 16% | → 25% | 21% |

Q3. *In the past 12 months, how would you rate your overall level of happiness?*

Base: All respondents (→ points to statistically higher result)

COVID Impact on Mental Health (New Question)

COVID has had a substantial impact on the mental health of British Columbians, but the impact does not differ for online gamblers in general or new online gamblers. Roughly half of all respondents, all online gamblers and new online gamblers report that their mental health has deteriorated as a result of COVID-19.

| | All Respondents | All Online Gamblers | New Online Gamblers |
|----------------------------------------|-----------------|---------------------|---------------------|
| | COVID | COVID | COVID |
| Sample Size | 800 | 247 | 99 |
| Improved my mental health a lot | 1% | 0% | 0% |
| Improved my mental health a little | 7% | 8% | 5% |
| Not impacted my mental health | 46% | 42% | 45% |
| Deteriorated my mental health a little | 39% | 40% | 38% |
| Deteriorated my mental health a lot | 6% | 10% | 11% |
| Don't know/Refused | 1% | 0% | 0% |
| Improved | 8% | 8% | 5% |
| Deteriorated | 46% | 50% | 49% |

NEWQB. Overall, how would you say the coronavirus (COVID-19) pandemic has impacted your mental health?

Base: All respondents (→ points to statistically higher result)

COVID Impact on Household Finances (New Question)

COVID has also had a substantial impact on the household finances of British Columbians. As with mental health, the impact does not differ for online gamblers in general or new online gamblers. Nearly half of all respondents and online gamblers report that their household finances have deteriorated as a result of COVID-19.

| | All Respondents | All Online Gamblers | New Online Gamblers |
|------------------------------------------|-----------------|---------------------|---------------------|
| | COVID | COVID | COVID |
| Sample Size | 800 | 247 | 99 |
| Improved my finances a lot | 3% | 4% | 6% |
| Improved my finances a little | 10% | 12% | 12% |
| Not impacted my finances | 40% | 38% | 41% |
| Deteriorated my finances a little | 36% | 32% | 29% |
| Deteriorated my finances a lot | 11% | 13% | 13% |
| Don't know/Refused | 1% | 0% | 0% |
| Improved | 13% | 16% | 17% |
| Deteriorated | 46% | 46% | 42% |

NEWQD. *Overall, how would you say the coronavirus (COVID-19) pandemic has impacted your household finances?*

Base: All respondents (→ points to statistically higher result)

Other COVID Impacts (New Question)

Other personal impacts of COVID are summarized in the table below. Notably, online gamblers are statistically more likely than the general population to report increased alcohol consumption, increased nicotine consumption, increased legal drug consumption and increased use of online gambling. However, these increases do not appear to be prompting additional online gambling as the numbers are similar for online gamblers in general and for new online gamblers. New online gamblers are less likely than online gamblers in general to say they have increased their online gambling.

| | All Respondents COVID | All Online Gamblers COVID | New Online Gamblers COVID |
|-----------------------------------------------------------------------------------------------------------------------------------------|--------------------------|------------------------------|------------------------------|
| Sample Size | 800 | 247 | 99 |
| Increased amount of time watching TV (either online, including Netflix, or watching regular TV) | 57% | 58% | 56% |
| Increased time online in general (including social media sites) | 56% | 57% | 54% |
| Decrease in amount of physical activity or exercise | 45% | 48% | 51% |
| Changes in eating habits | 44% | 48% | 47% |
| Increased amount of time playing video games on a computer, phone, tablet or game console | 28% | 34% | 36% |
| Increased alcohol consumption | 25% → | 37% | 29% |
| Increased tension in my household | 24% | 26% | 23% |
| Increased nicotine consumption, including smoking cigarettes or vaping | 10% → | 20% | 14% |
| Increased use of legal drugs, including cannabis marijuana | 9% → | 17% | 13% |
| Increased use of online gambling or betting activities (including gambling style games on social networking or betting on sports teams) | 6% → | 21% | ← 9% |
| Increased use of other drugs | 3% | 5% | 3% |
| Other ways not listed here | 11% | 9% | 11% |
| None of the above | 13% | 10% | 11% |

NEWQC. Would you say that the coronavirus (COVID-19) pandemic has impacted you personally in any of the following ways?

Base: All respondents (→ points to statistically higher result)

GAMBLING BEHAVIOURS

Gambling Motivations

COVID online gamblers are less likely than Pre-COVID to report all gambling motivations, with statistically significant declines for a chance to win big, the sense of anticipation, to make money and something to do with family/friends.

New online gamblers are statistically less likely than online gamblers in general to be motivated by making money and escaping boredom.

Motivation is Absolutely Critical, Very Important or Somewhat Important

| | All Online Gamblers | | New Online Gamblers |
|---------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| A chance to win big | 87% | ← 79% | 75% |
| The sense of anticipation/ chance to dream | 92% | ← 78% | 68% |
| Entertainment/fun | 82% | 77% | 72% |
| Sense of achievement when I win | 73% | 68% | 57% |
| To make money | 74% | ← 61% | ← 46% |
| To escape boredom/fill my time | 63% | 58% | ← 41% |
| It provides a rush/thrill | 63% | 56% | 46% |
| For the mental challenge or to learn about the game/activity | 41% | 34% | 27% |
| It helps when I feel tense | 35% | 32% | 26% |
| Something to do with family/friends | 48% | ← 28% | 24% |
| To impress other people | 16% | 12% | 7% |

Q16A. (Generally speaking) Since COVID restrictions began, how important (are)/have each of the following as reasons for why you gamble?

Base: Online gamblers (→ points to statistically higher result)

Time Spent Online Gambling

There is no change in time spent online gambling in the Pre-COVID and COVID surveys. Newer online gamblers are statistically less likely than online gamblers in general to say they participate for an hour or more each week.

| | All Online Gamblers | | New Online Gamblers |
|--------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| Less than 1 hour a week | 64% | 61% | → 72% |
| 1-3 hours a week | 13% | 17% | 12% |
| 4-6 hours a week | 8% | 6% | 3% |
| 7-9 hours a week | 5% | 3% | 2% |
| 10-12 hours a week | 2% | 4% | 1% |
| 12-14 hours a week | 2% | 2% | 0% |
| 15 or more hours a week | 1% | 4% | 4% |
| Don't know/Refused | 4% | 3% | 5% |
| 1+ hours | 32% | 36% | ← 23% |
| 4+ hours | 19% | 19% | 11% |

Q18. (Over the past 12 months) Since COVID restrictions began, approximately how much time did you spend gambling online in an average week?

Base: Online gamblers (→ points to statistically higher result)

Online Gambling Time of Day

There is no statistical change in time spent online gambling in the Pre-COVID and COVID surveys, although more COVID survey respondents, and newer online gamblers especially, said 'don't know' to this question. This is likely due to the increase in lottery/charity online play which doesn't have a specific time of day.

| | All Online Gamblers | | New Online Gamblers |
|--------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| Early morning 6 a.m. to 9 a.m. | 6% | 7% | 6% |
| Late morning 9 a.m. to noon | 10% | 9% | 11% |
| Noon to 6 p.m. | 20% | 16% | 13% |
| 6 p.m. to midnight | 46% | 47% | 40% |
| Midnight to 6 a.m. | 10% | 7% | 6% |
| Don't Know/Refused | 8% | → 15% | → 25% |

Q20. *What time of day do you most often use the Internet to gamble or place bets?*

Base: Online gamblers (→ points to statistically higher result)

Number of Online Gambling Accounts

COVID online gamblers, especially new online gamblers, are statistically more likely than Pre-COVID gamblers to say they have no online accounts. It is speculation, but it is possible that online charity raffle and lottery ticket buyers do not consider their purchases as from a gambling website.

| | All Online Gamblers | | New Online Gamblers |
|---------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| 0 | 11% | → 21% | → 38% |
| 1 | 68% | ← 56% | 46% |
| 2 | 12% | 10% | 7% |
| 3-4 | 8% | 6% | 2% |
| 5-6 | 0% | 5% | 4% |
| More than 6 | <1% | 1% | 1% |
| Don't know/Refused | 1% | 1% | 3% |
| 1+ | 89% | ← 78% | ← 59% |
| 2+ | 20% | 22% | 13% |

Q25. *How many separate online accounts do you have with different online gambling websites?*

Base: Online gamblers (→ points to statistically higher result)

Responsible Gambling Activities: Online Tools

The use of various online responsible gambling tools has not shifted during COVID. New online gamblers are less likely than online gamblers in general to say they always/almost always use tools that set limits on spending.

Take Action Always or Almost Always

| | All Online Gamblers | | New Online Gamblers |
|--------------------------------------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| Tools that set limits on how much money you can spend (e.g. loss limits, deposits limits) | 22% | 23% | ← 13% |
| Tools that set limits on how much time you can spend playing | 10% | 10% | 9% |
| Tools that remind/require you to take breaks in playing | 7% | 6% | 9% |
| Tools that provide information to learn about responsible/problem gambling | 9% | 6% | 5% |
| Tools that set limits on when you can play (e.g. days of week, times of day) | 9% | 5% | 5% |

Q41. *There are a number of tools available on ONLINE gambling sites that allow users to set limits on the amount of time or money they spend gambling. Thinking about when you participated in ONLINE gambling activities (over the last 12 months) since COVID restrictions began, how often did you use each of the following tools? If a tool does not apply to at all, choose 'Not applicable to me'.*

Base: Online gamblers (→ points to statistically higher result)

PGSI

Endorsement of PGSI Components

Endorsement of all nine PGSI components has declined directionally during COVID compared to Pre-COVID. The only statistical decline is in the percentage of online gamblers who say they have felt they might have a problem with gambling.

New online gamblers are statistically less likely than online gamblers in general to say they have felt guilty about their gambling, to have felt they have a problem, or to have borrowed money/sold anything to support their gambling.

Sometimes, Most of the Time or Almost Always

| | All Online Gamblers | | New Online Gamblers |
|---------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| Have you gone back another day to try to win back the money you lost | 40% | 34% | 24% |
| Have you felt guilty about the way you gamble or what happens when you gamble | 34% | 27% | ← 9% |
| Have you bet more than you could really afford to lose | 32% | 28% | 25% |
| Have you felt that you might have a problem with gambling | 30% | ← 21% | ← 9% |
| Have you needed to gamble with larger amounts of money to get the same feeling of excitement | 28% | 24% | 17% |
| Has your gambling caused you any health problems, including stress or anxiety | 26% | 19% | 11% |
| Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true | 21% | 18% | 13% |
| Has your gambling caused financial problems for you or your household | 18% | 13% | ← 5% |
| Have you borrowed money or sold anything to get money to gamble | 14% | 13% | 7% |

Q33. Thinking about when you participated in gambling activities (over the last 12 months) since COVID restrictions began, how often ...?

Base: Online gamblers (→ points to statistically higher result)

PGSI – Problem Gambling Severity Index

There are directionally fewer moderate/high risk problem gamblers during COVID than Pre-COVID, but the difference is not statistically significant. Similarly, there are fewer moderate/high risk problem gamblers among new online gamblers compared to all online gamblers, but the difference is not statistically significant.

| | All Online Gamblers | | New Online Gamblers |
|-------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| Non problem gambler | 48% | 49% | 57% |
| Low risk problem gambler | 15% | 22% | 23% |
| Moderate risk problem gambler | 20% | ← 13% | 10% |
| High risk problem gambler | 17% | 16% | 9% |
| Moderate/high risk problem gambler | 37% | 29% | 19% |

Base: Online gamblers (→ points to statistically higher result)

PGSI – Change Among Individual Respondents

In the COVID survey, only the online gamblers (n=247) were asked the PGSI questions. We compared the PGSI classification for each of these online gamblers across the two surveys. Most (72%) stayed in the same PGSI classification in both surveys. The remainder are about equally likely to have increased their risk classification in the COVID survey (16%) as to have lowered their risk classification (12%).

The sample sizes of those with increased risk (n=33) and decreased risk (n=36) are too small to allow for a robust analysis of who they are or what drove their change.

| | All Online Gamblers | | New Online Gamblers |
|-------------------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| PGSI classification stayed the same | n/a | 72% | 74% |
| PGSI classification moved into higher risk (e.g. from low to moderate) | n/a | 16% | 21% |
| PGSI classification moved into lower risk (e.g. from high to moderate) | n/a | 12% | 6% |

Base: Online gamblers during COVID (→ points to statistically higher result)

POSITIVE PLAY INDEX (PPI)

Positive Play: Pre Commitment Index (Among Gambled in Past 30 Days)

There has been an increase in the percentage of online gamblers scoring as Low on the Pre Commitment Index during COVID compared to Pre-COVID. This change is driven by more COVID online respondents giving low scores for ...

- I considered the amount of TIME I was willing to spend BEFORE I gambled. (38% 1-3 scores in COVID survey vs. 28% 1-3 scores Pre-COVID)
- I considered the amount of MONEY I was willing to lose BEFORE I gambled. (16% 1-3 scores in COVID survey vs. 4% 1-3 scores Pre-COVID)

| | All Online Gamblers | | New Online Gamblers |
|--------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 132 | 198 | 70 |
| High (6-7) | 39% | 36% | 45% |
| Medium (4-5) | 27% | 19% | 22% |
| Low (1-3) | 34% → | 45% | 32% |

Q46. *Thinking about your gambling over the last month (30 days), please answer the following questions. In the last month (30 days) ...?*

- I only gambled with MONEY that I could afford to lose.
- I only spent TIME gambling that I could afford to spend.
- I considered the amount of MONEY I was willing to lose BEFORE I gambled.
- I considered the amount of TIME I was willing to spend BEFORE I gambled.

Scale: 1 = Never to 7 = Always

Base: Online gamblers who have gambled in past 30 days (→ points to statistically higher result)

Positive Play: Gambling Literacy Index (Among Gambled in Past 30 Days)

Nothing has shifted for Gambling Literacy during COVID.

| | All Online Gamblers | | New Online Gamblers |
|--------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 132 | 198 | 70 |
| High (6-7) | 45% | 45% | 45% |
| Medium (4-5) | 29% | 33% | 33% |
| Low (1-3) | 25% | 22% | 22% |

Q47. *How much do you agree with the following statements? I believe that ...?*

- Gambling is not a good way to make money.
- My chances of winning get better after I have lost (SCALE REVERSED FOR INDEX)
- If I gamble more often, it will help me to win more than I lose (SCALE REVERSED FOR INDEX)

Scale: 1 = Strongly Disagree to 7 = Strongly Agree

Base: Online gamblers who have gambled in past 30 days (→ points to statistically higher result)

RG RESOURCES

Awareness of Provincial Government Resources

Among online gamblers, there is a statistically higher COVID awareness of both the toll-free help line and free problem gambling services. However, this increase could simply be because these respondents were exposed to the same awareness question only 3-4 months earlier.

| | All Online Gamblers | | New Online Gamblers |
|----------------------------------------------------------------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| That there is a toll-free problem gambling help line in British Columbia? | 77% → | 90% | 89% |
| That the BC provincial government provides problem gambling counselling services that are available free of charge? | 73% → | 81% | 82% |

Q48. *Prior to today, were you aware of the following?*

Base: Online gamblers (→ points to statistically higher result)

Awareness of BCLC Programs/Initiatives

COVID online gamblers have statistically higher awareness of reminders to play responsibly at retail locations as well as the toll-free support line. Awareness of other resources also show directional increases. Again, these increases could be because of exposure to these supports in the Pre-COVID survey.

| | All Online Gamblers | | New Online Gamblers |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| A voluntary self-exclusion program which offers players the option to exclude themselves from entering any BC gambling venue, or accessing BCLC's internet gambling site | 65% | 68% | 59% |
| Reminders to play responsibly on PlayNow.com, BCLC's internet gambling website or on bclc.com | 62% | 64% | 67% |
| GameSense, a program that educates and reminds people about how to keep gambling safe and fun | 58% | 63% | 62% |
| Reminders to play responsibly at retail locations that sell lottery tickets or games | 51% | → 63% | 70% |
| The toll-free Problem Gambling/BC (GAM Info Line)/gambling support line | 46% | → 63% | 57% |
| Advertising materials that remind people about responsible gambling | 51% | 54% | 55% |
| Availability of free counseling for those that need help | 43% | 48% | 41% |
| (Staff onsite at casinos in BC) GameSense Advisors, who are (trained)/available online and via phone to provide information on how to keep gambling safe and fun | 35% | 37% | 32% |

Q49. Which of the following programs or initiatives promoting or encouraging responsible gambling in BC are you aware?

Base: Online gamblers (→ points to statistically higher result)

BCLC Voluntary Self Exclusion Program

Statistically fewer online gamblers in the COVID survey report they are currently enrolled in BCLC's Voluntary Self Exclusion program. New online gamblers are statistically more likely than online gamblers in general to say they have never enrolled in VSE.

| | All Online Gamblers | | New Online Gamblers |
|------------------------------------------------------------------------------|---------------------|-------|---------------------|
| | Pre | COVID | COVID |
| Sample Size | 184 | 247 | 99 |
| I have never enrolled in BCLC's Voluntary Self-Exclusion program | 80% | 85% | → 93% |
| I am currently enrolled in BCLC's Voluntary Self-Exclusion program | 9% | ← 4% | 2% |
| I was enrolled in BCLC's Voluntary Self-Exclusion program in the past | 8% | 10% | 4% |
| Don't know/Refused | 3% | 1% | 1% |

Q51. Which of the following best describes your enrollment in BCLC's Voluntary Self Exclusion program?

Base: Online gamblers (→ points to statistically higher result)