



Ipsos

Ipsos Reid



belc



British Columbia Lottery Corporation

Province-wide Retailer and Player Tracking
Executive Summary
March 2009



Introduction

- In May 2007, BCLC commissioned Ipsos Reid to conduct a province-wide telephone survey of retailers in an effort to more fully understand the play habits of retail clerks within the BCLC retailer network.
- A comparative study was also undertaken among a province-wide sample of past year players of any BCLC lottery games.
- The data from this initial study provided a benchmark measurement and has evolved into an ongoing tracking program of BCLC retail clerks and players and their respective play behaviours.
- In February 2009, the fifth wave of tracking interviews was conducted among a sample of n=500 retail clerks and n=500 past year players in the general population of any BCLC lottery games.
- The primary research objective of this tracking program is to determine the rate of lottery play and spend among lottery retail clerks in comparison to the rate of play and spend of lottery players within the general population.
- Additional questions relating to Keno play are included for both the Retailer and Player studies.



Key Findings

- The incidence of lottery play among retail clerks is virtually the same as within the general population.
 - 87% of retail clerks and 85% of the general population report having played a BCLC lottery game within the past year.
 - This is an increase for both retailers and players from the previous wave (the highest levels of participation in several waves).
- Retail clerks who play the lottery continue to differentiate themselves from general population players on the basis of spend.
 - Clerks who play spent significantly more than general population players on lottery games in the past year (\$405 vs. \$194).
 - Higher spending by retail clerks who play may be due in part to the number of different BCLC products they play compared to general population players (an average of 4.2 different BCLC games compared to an average of 3.1 games).
 - Overall player spending has dropped significantly for the third consecutive wave. Because participation has not followed suite (and has actually increased this wave), this shows that while players are continuing to play the lottery, they are allocating fewer of their discretionary dollars to the category.



Key Findings

- Contrary to past waves, the pattern of participation differs among retail clerks and general population players for the past 4 weeks and past 7 days.
 - The incidence of past 4 week play increased to 85% for retailers (from 72% in wave 4) but remained fairly steady at 73% for general population players (compared to 71% in wave 4). Spending on an overall basis continues to be higher for retail clerks (2 times).
 - A significant increase in Lotto 6/49 participation among retail clerks could have helped drive the higher overall participation.
- Within the past 7 days, 65% of retail clerks who play have played a BCLC lottery game. In comparison, 44% of general population players have played in the past 7 days. With regard to spend, retail clerks who play spent 1.6 times more than general population players in the past 7 days.



Key Findings

- A comparison of Keno play behaviour of retail clerks and general population players who played Keno revealed the following:
 - More retail clerks play 5 or more numbers per draw compared to Keno players in the general population. However, caution must be noted because of the relatively small base size of general population Keno players.
 - A \$1 wager is the most common single wager for both retail clerks who play and general population Keno players.
 - A higher number of retail clerks than general population Keno players are likely to play the Keno Bonus Multiplier as part of their regular Keno play.



Key Findings

Summary of Participation

Any Game	Wave 2 (January 2008)			Wave 3 (May 2008)			Wave 4 (October 2008)			Wave 5 (February 2009)		
	Retail Clerks	General Pop	Ratio	Retail Clerks	General Pop	Ratio	Retail Clerks	General Pop	Ratio	Retail Clerks	General Pop	Ratio
Past Year play	83%	83%**	1.0	81%	79%**	1.03	81%	77%**	1.05	87%	85%**	1.02
Among Past Year Players												
Past 4 week play	75%	74%	1.0	71%	67%	1.1	72%	71%	1.01	85%	73%	1.2
Past 7 day play	49%	42%	1.2	48%	46%	1.04	44%	42%	1.05	65%	44%	1.5

****Source: Canadian Online Omnibus (January 2008, May 2008, September 2008, January 2009)**



Key Findings

Summary of Spending

Any Game	Wave 2 (January 2008)			Wave 3 (May 2008)			Wave 4 (October 2008)			Wave 5 (February 2009)		
	Retail Clerk Players	General Pop Players	Ratio	Retail Clerk Players	General Pop Players	Ratio	Retail Clerk Players	General Pop Players	Ratio	Retail Clerk Players	General Pop Players	Ratio
Past year spend among past year players	(n=449)	(n=500)		(n=421)	(n=500)		(n=424)	(n=500)		(n=433)	(n=500)	
	\$538	\$269	2.0	\$417	\$295	1.4	\$414	\$249	1.7	\$405	\$194	2.1
Past 4 week spend among past 4 week players	(n=335)	(n=372)		(n=298)	(n=333)		(n=305)	(n=356)		(n=367)	(n=365)	
	\$65	\$44	1.5	\$66	\$43	1.5	\$68	\$41	1.7	\$68	\$34	2.0
Past 7 day spend among past 7 day players	(n=219)	(n=209)		(n=203)	(n=232)		(n=187)	(n=209)		(n=280)	(n=219)	
	\$25	\$18	1.4	\$25	\$18	1.4	\$28	\$19	1.5	\$25	\$16	1.6