



Ipsos Reid Public Affairs



British Columbia Lottery Poll Report of Findings

June 26, 2008



Survey Methodology

These are the results of an Ipsos Reid poll conducted on behalf of the BC Lottery Corporation.

This online poll was fielded June 9 to June 17, 2008 with a representative sample of 813 adult British Columbians.

The poll was conducted online using a randomly selected subset of Ipsos Reid's panel of more than 12,000 British Columbian households.

These data were statistically weighted to ensure the sample's regional and age/sex composition reflects that of the actual BC population according to 2006 Census data. The margin of error is ± 3.4 percentage points, 19 times out of 20.

- The margin of error will be larger within regions and for other sub-groupings of the survey population.

The results are compared to similar polls conducted throughout the past year.

Please note that some "Totals" in this report may seem off due to rounding error.

- For example, 35% and 24% might add to 60% (not 59%). With decimals, the component percentages might be 35.4% (rounds down to 35%) and 24.2% (rounds down to 24%), making the total 59.6%, which rounds up to 60%. All percentages shown are correct.



Key Findings

All results for the current wave (June 2008) are statistically consistent with those attained in the previous wave (March 2008).

Impressions of BCLC

Overall, favourable impressions of BCLC remain positive and currently sit at 40% (7% very favourable plus 33% somewhat favourable).

Looking at specific levels of trust and confidence BC residents are showing a relatively positive outlook towards BCLC and gaming on all statements tested.

- About seven-in-ten (68%) BC residents agree with the statement *"I trust the BC Lottery Corporation to ensure that the right prizes are paid to the rightful owner of the ticket."*
- Just over six-in-ten (63%) BC residents agree with the statement *"I have trust in the integrity and fairness of lottery games in British Columbia."*
- Six-in-ten (61%) BC residents agree with the statement *"I trust the BC Lottery Corporation to manage lottery games in BC."*

Impressions of Retailers

Ratings of the level of service received from retailers remains positive (83% rating the level of service as 'good' or better).

While ratings for service are high, trust in retailers remains at the 50% mark.

- One-half (51%) of BC residents agree that *"I'm confident lottery retail clerks are providing lottery players with accurate information about winning tickets."*
- A similar proportion (48%) of BC residents agree with the statement *"I trust lottery retail clerks with my purchases and validations of lottery tickets."*



Key Findings (cont'd)

Support for BCLC Actions and Directives

In considering in detail the many actions implemented by BCLC, most residents (68%) feel that BCLC is taking the right amount of action.

And specifically, support for new policies is high with 90% support for restricting retailer play at their place of employment and 74% support for restricting the prize amounts that retailers are allowed to pay out to customers.

Impact of Play with Confidence Messaging

Messaging about validation slips appears to be making an impact as seven-in-ten lottery players say they receive a validation slip from a retail clerk the majority of the time and a large proportion (73%) of those who receive slips say that they routinely review them.

When it comes to other measures, the impact of messaging isn't as prominent, but it is showing a positive trend. Currently, one-third (35%) of lottery players say that they regularly sign the back of their ticket and over one-quarter (27%) of players notice their winning tickets are being stamped as being "Paid by Lottery Retailer".



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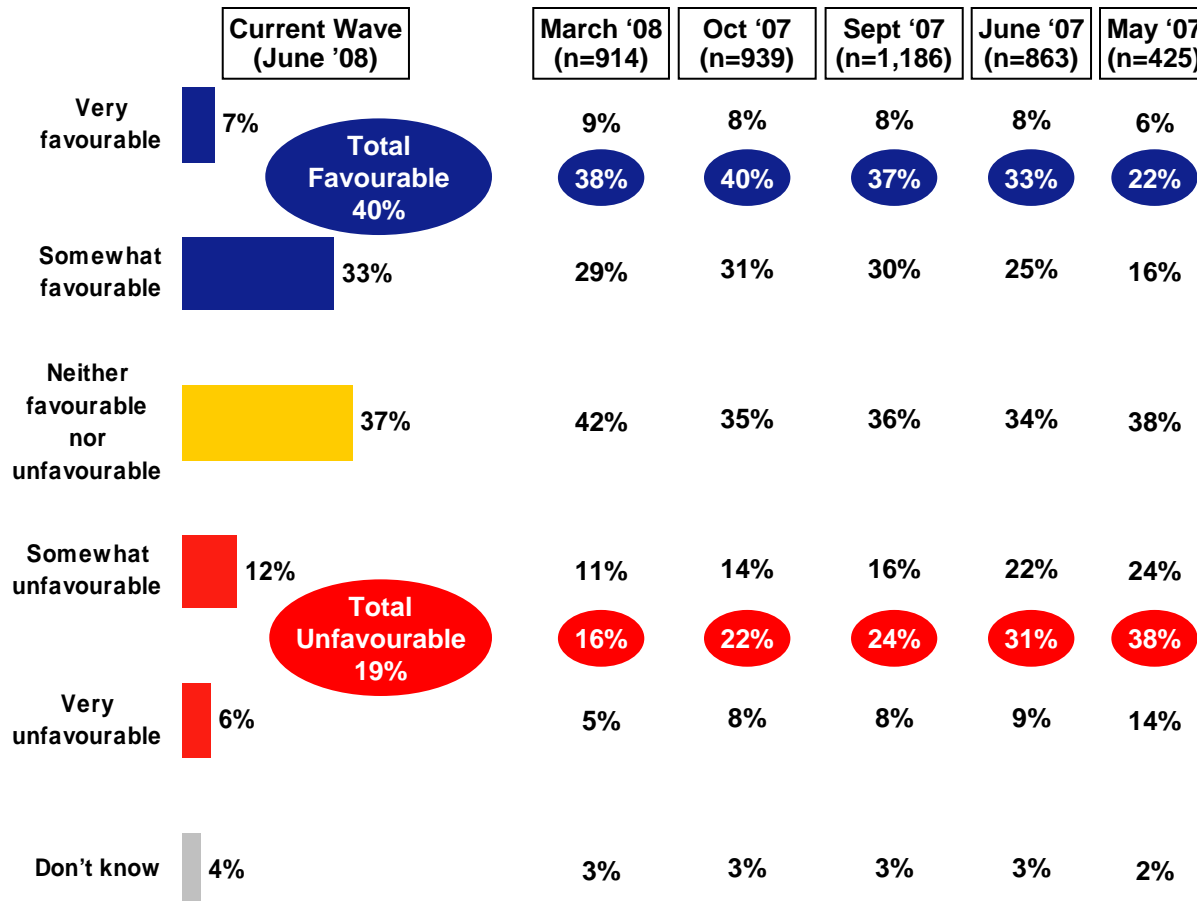


Detailed Results



Impressions of BC Lottery Corporation

Q1. To begin, do you have a favourable or unfavourable impression of the British Columbia Lottery Corporation?



Highlights

- Favourable impressions of BCLC continue to be stable at the 40% mark.
- Men are more inclined to have a favourable impression of BCLC than women.
- Lottery players too are more likely to have a favourable impression.

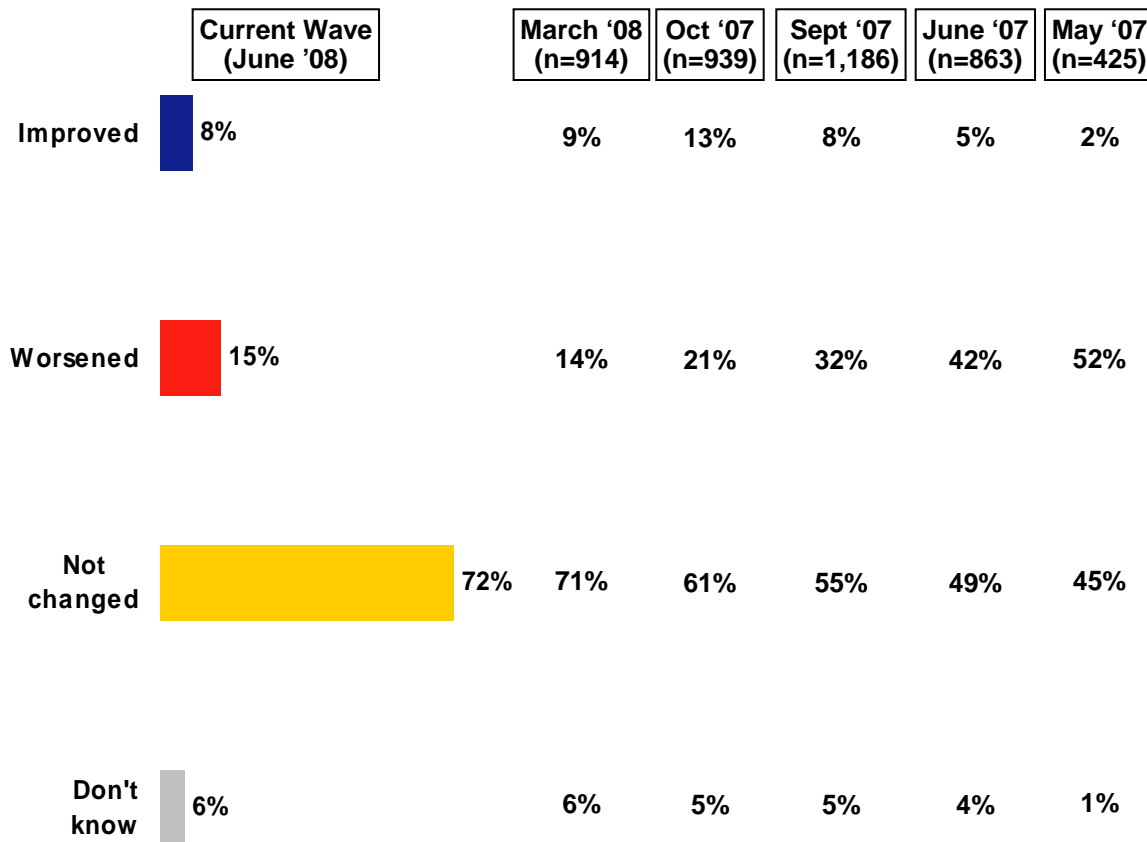
	Favourable	Unfavourable
Players	50%	13%
LM	42%	18%
Rest of BC	39%	19%
Men	45%	19%
Women	36%	18%

Base: All respondents (n=813)



Change in Impressions of BC Lottery Corporation

Q2. Has your impression of the BC Lottery Corporation improved, worsened or not changed over the last few months?



Highlights

- Consistent with last wave's findings, the majority (72%) of BC residents' impressions of BCLC has not changed over the last few months.

	Improved	Worsened
Players	9%	15%
LM	8%	11%
Rest of BC	7%	20%
Men	10%	15%
Women	5%	14%

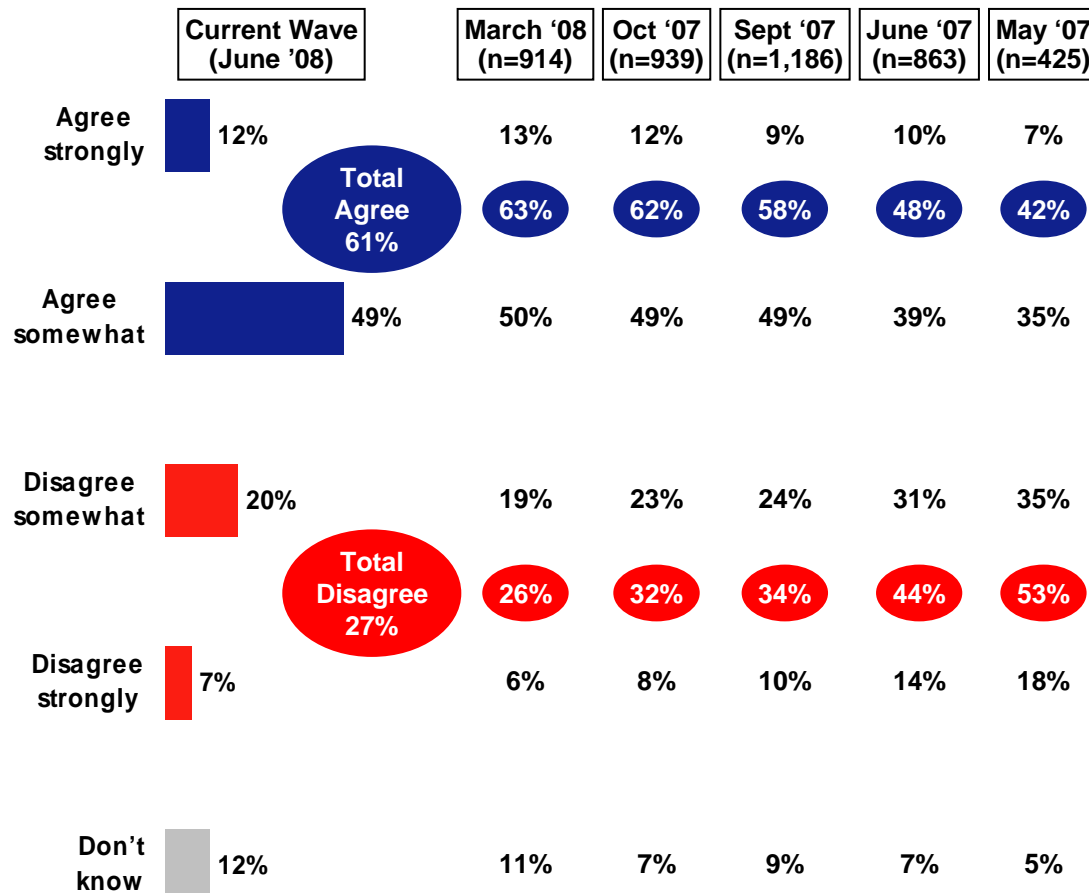
Base: All respondents (n=813)



Trust in BC Lottery Corporation to Manage Lottery Games

Q3. Please indicate whether you agree or disagree with this statement.

"I trust the BC Lottery Corporation to manage lottery games in BC."



Base: All respondents (n=813)

Highlights

- Six-in-ten (61%) BC residents agree that they trust BCLC to manage lottery games in the province. This has remained consistent over the last four waves.
- Lottery players' trust in BCLC is notably higher.
- Similarly, men are more likely than women to have trust in BCLC.

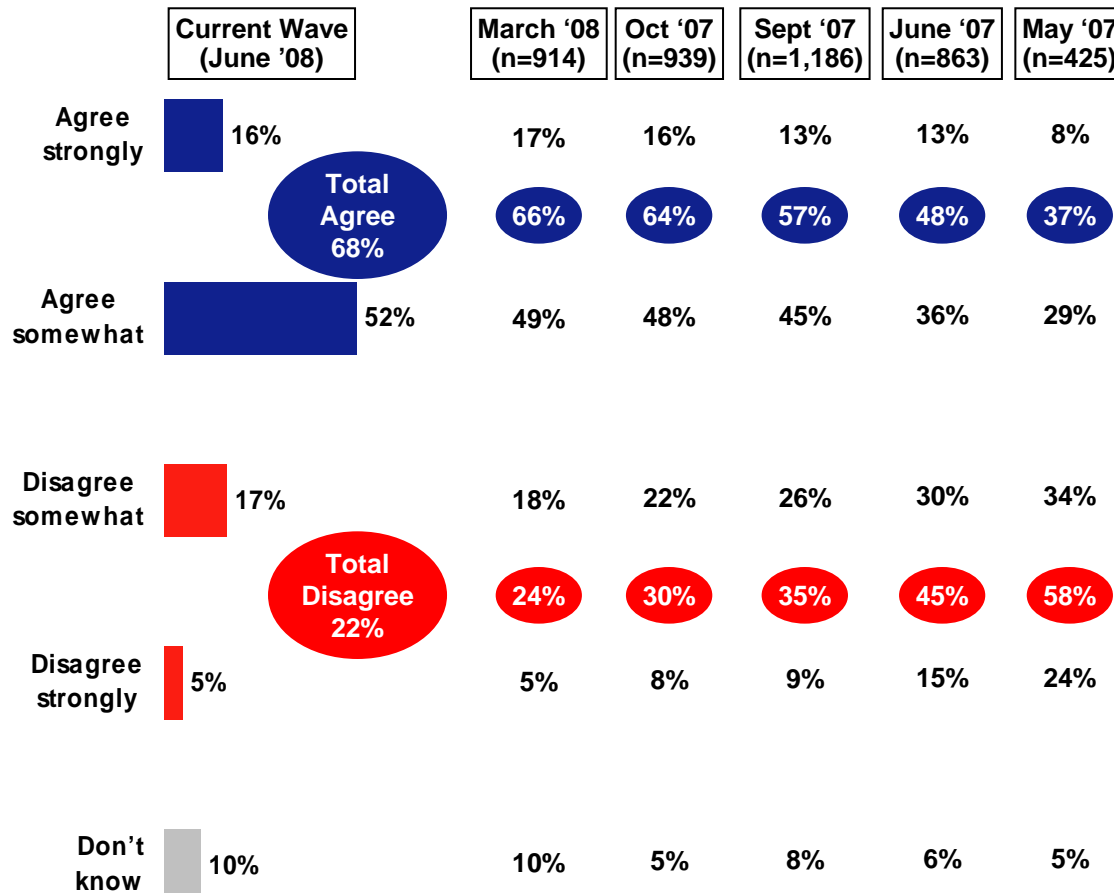
	Agree	Disagree
Players	69%	24%
LM	64%	24%
Rest of BC	58%	30%
Men	66%	23%
Women	57%	30%



Trust in BCLC to Ensure Prizes Paid to Right Person

Q4. Please indicate whether you agree or disagree with this statement.

"I trust the BC Lottery Corporation to ensure that the right prizes are paid to the rightful owner of the ticket."



Base: All respondents (n=813)

Highlights

- Nearly seven-in-ten (68%) BC residents trust that BCLC will ensure that prizes are distributed to the rightful ticket owner. This is consistent with last wave's findings.
- Lottery players are more likely to have trust in BCLC to distribute prize winnings accurately.

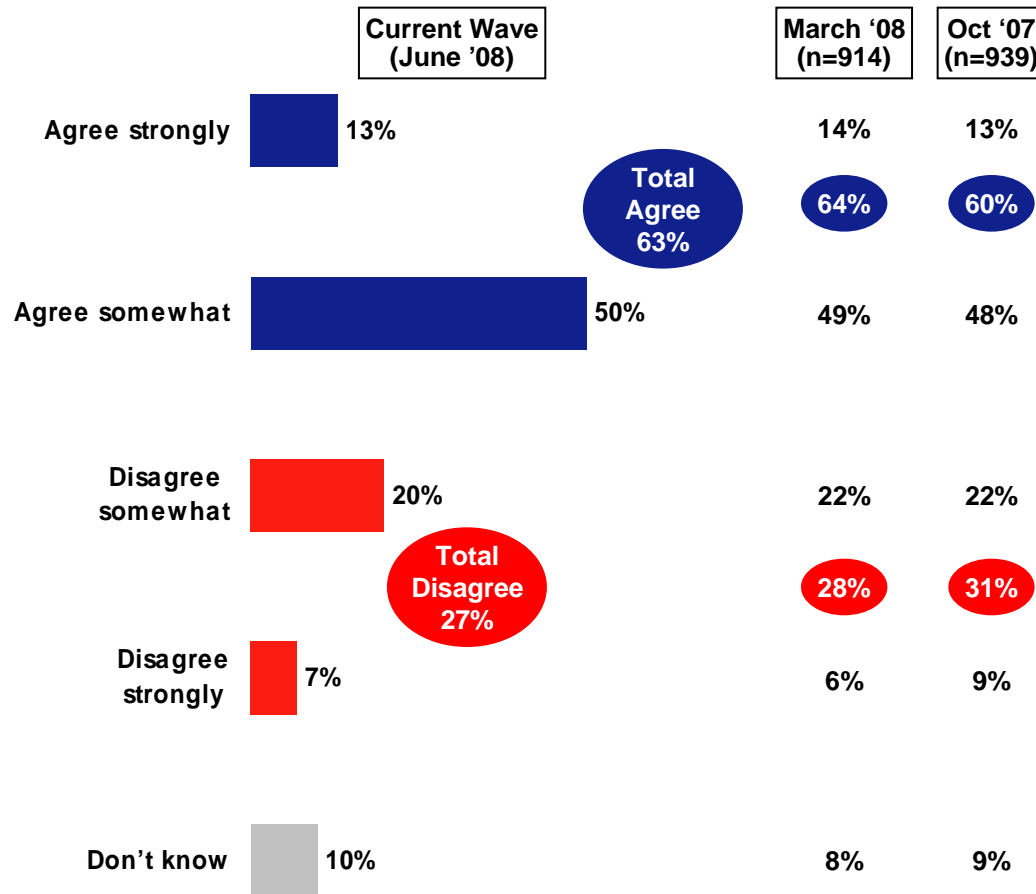
	Agree	Disagree
Players	76%	20%
LM	68%	22%
Rest of BC	67%	22%
Men	70%	22%
Women	66%	23%



Trust in Integrity and Fairness of Lottery Games in British Columbia

Q5a. Please indicate whether you agree or disagree with this statement.

"I have trust in the integrity and fairness of lottery games in British Columbia."



Highlights

- As per last wave's findings, just over six-in-ten (63%) BC residents agree that they have trust in the integrity and fairness of lottery games in BC.
- Lottery players are more likely to have trust in the integrity and fairness of lottery games.

	Agree	Disagree
Players	70%	25%
LM	64%	26%
Rest of BC	61%	30%
Men	68%	24%
Women	58%	31%

Base: All respondents (n=813)



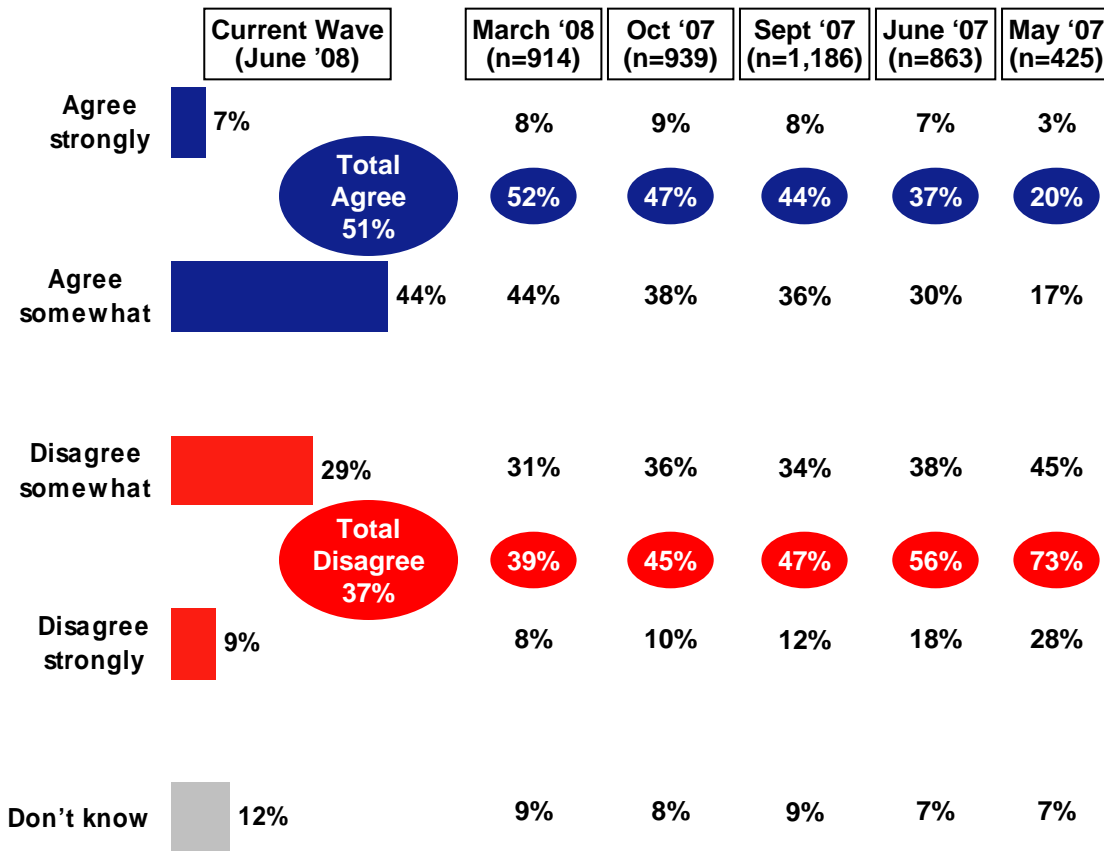
Confidence in Information from Lottery Retail Clerks

Q5. Please indicate whether you agree or disagree with this statement.

"I'm confident lottery retail clerks are providing lottery players with accurate information about winning tickets."

Highlights

- Confidence in retail clerks remains consistent with last wave's findings. One-half (51%) of BC residents are confident that retail clerks are providing customers with accurate information about winning tickets.
- Lottery players are slightly more confident in this regard.



	Agree	Disagree
Players	56%	38%
LM	49%	39%
Rest of BC	54%	36%
Men	54%	36%
Women	49%	38%

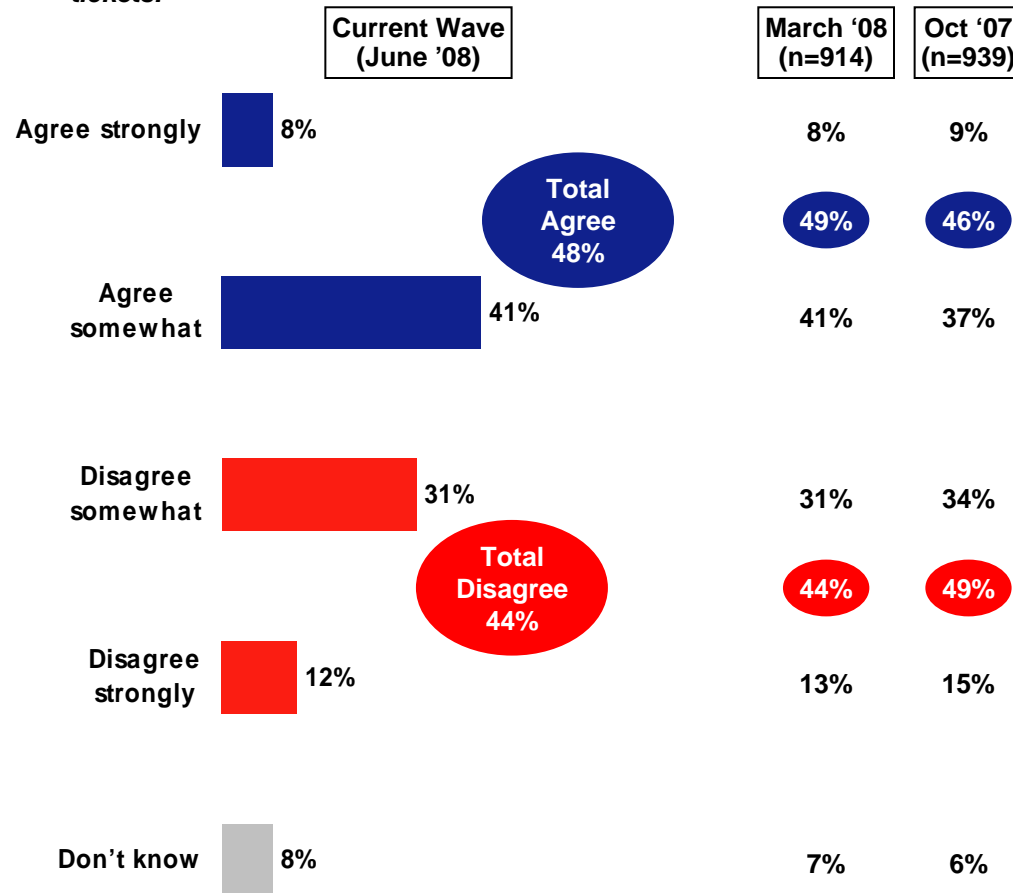
Base: All respondents (n=813)



Trust in Lottery Retail Clerks with Purchases and Lottery Ticket Validations

Q4a. Please indicate whether you agree or disagree with this statement.

"I trust lottery retail clerks with my purchases and validations of lottery tickets."



Highlights

- Like last wave, nearly one-half (48%) of BC residents say that they trust lottery retail clerks with their purchases and the validation of lottery tickets.
- Lottery players are significantly more likely to have trust in retail clerks for purchases and validations.

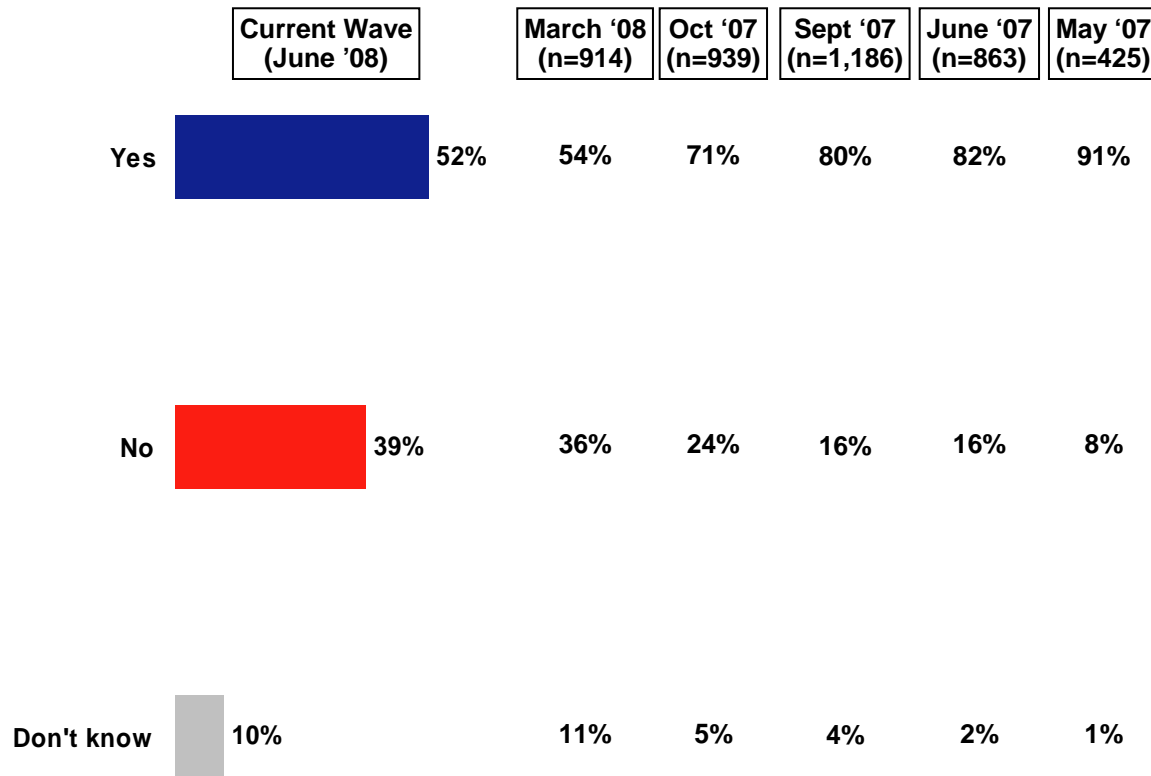
	Agree	Disagree
Players	54%	44%
LM	47%	45%
Rest of BC	50%	41%
Men	50%	43%
Women	47%	44%

Base: All respondents (n=813)



Awareness of Recent Reports

Q6. In the last few months (weeks in September and earlier), have you read, seen or heard any reports questioning the integrity of lottery gaming here in British Columbia?



Highlights

- Consistent with last wave, just over one-half (52%) of BC residents claim to have noticed recent reports pertaining to the integrity of lottery games in BC.
- Men are more likely than women to say they have noticed reports lately.
- Residents in the Lower Mainland are more likely than those elsewhere in the province to have noticed recent reports.

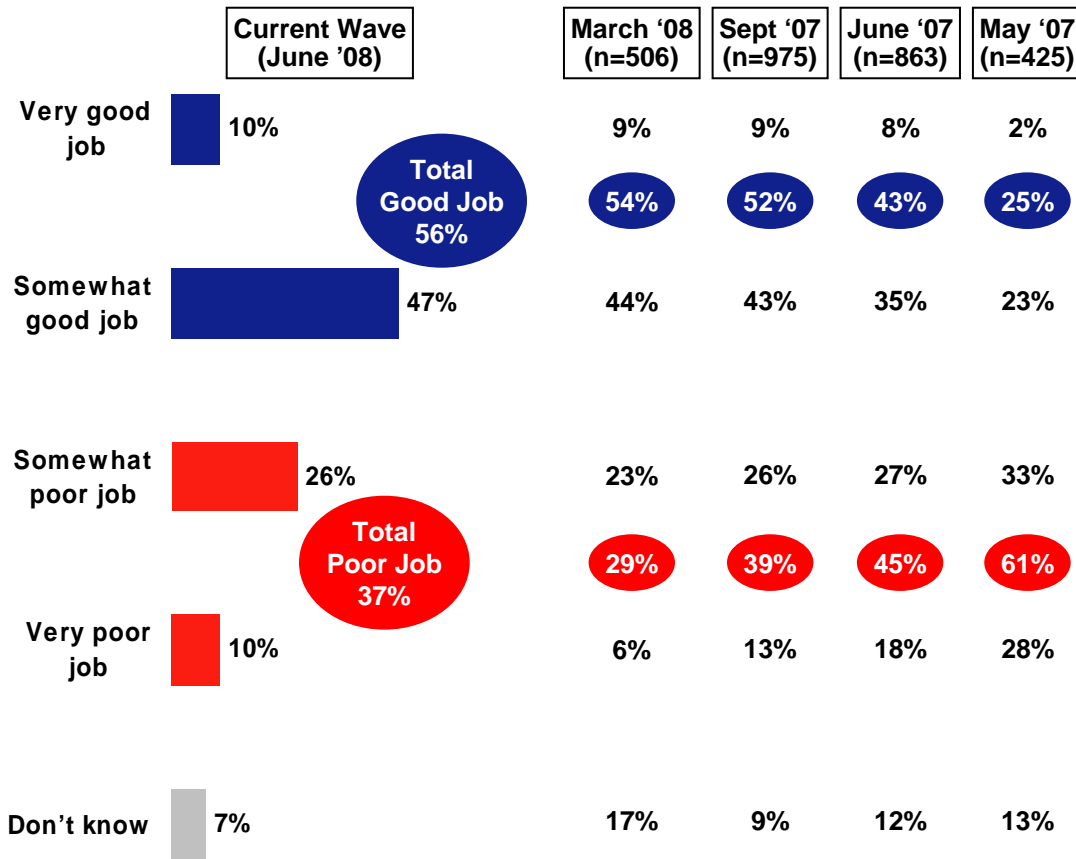
	Yes, Aware
Players	56%
LM	54%
Rest of BC	48%
Men	58%
Women	46%

Base: All respondents (n=813)



BCLC's Performance at Responding to Issues

Q7. In your opinion, has the BC Lottery Corporation done a good job or a poor job at responding to the issues raised in these reports?



Highlights

- Similar to last wave, over one-half (56%) of BC residents believe that BCLC is doing a good job at responding to issues facing the corporation.
- Lottery players in particular feel that BCLC is doing a good job.

	Good Job	Poor Job
Players	61%	33%
LM	58%	34%
Rest of BC	54%	40%
Men	54%	39%
Women	59%	34%

Base: Heard recent reports questioning integrity of lottery gaming in BC (n=434)

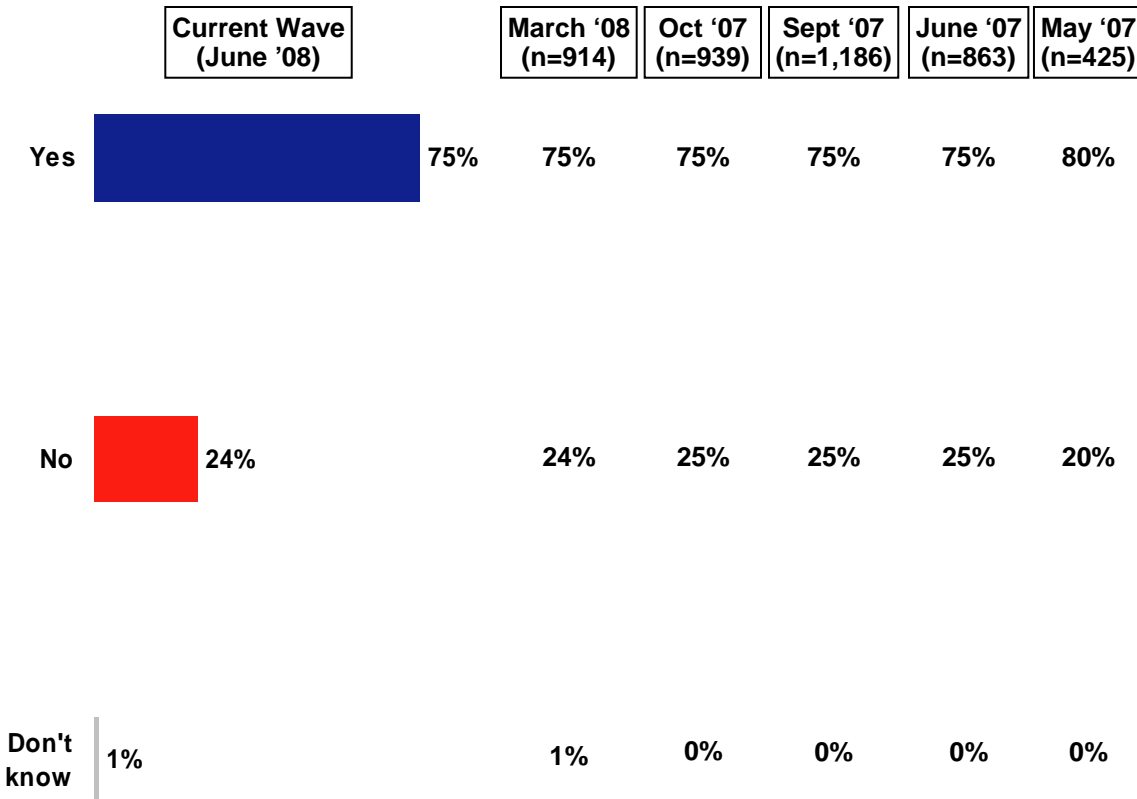


Lottery Play

Q8. Have you played any lottery games in the past year? By lottery games this means Lotto 6/49, Super 7, Scratch & Win, Millionaire Life, Keno or Sports Action or other games offered at lottery ticket retailers.

Highlights

- Three-quarters of BC residents have played lottery games within the last year.



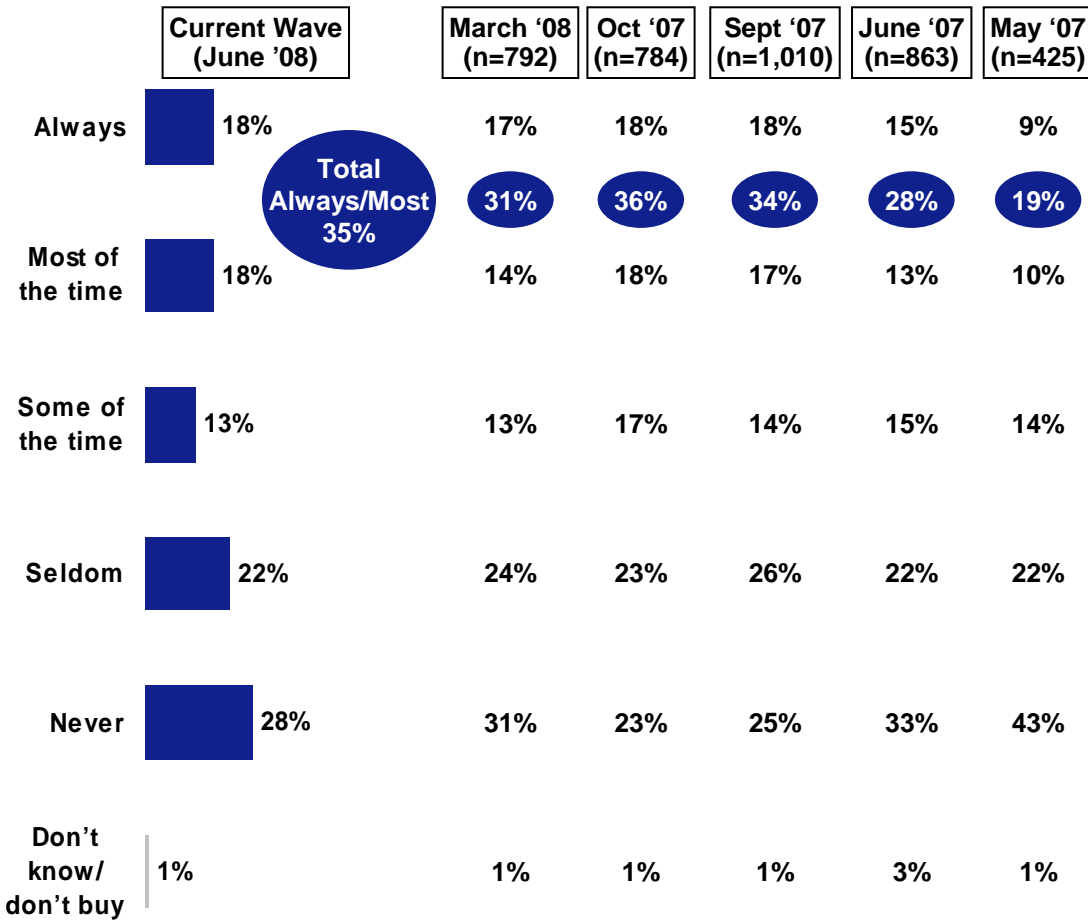
	Yes, Played
LM	73%
Rest of BC	78%
Men	74%
Women	76%

Base: All respondents (n=813)



Signing the Back of Lottery Tickets

Q10. When you buy lottery tickets, how often do you sign the back of the ticket?



Highlights

- Consistent with the last few waves, about one-third (35%) of lottery players regularly sign the back of their ticket.
- An almost equal proportion of lottery players (28%) however, never sign the back of their ticket.

	Always/Most
LM	34%
Rest of BC	37%
Men	36%
Women	35%

Base: Lottery players (n=693)



Methods Used to Check for Winning Tickets

Q11. How do you check to see if your ticket is a winning ticket?

	Current Wave (June '08)	March '08 (n=792)	Oct '07 (n=784)	Sept '07 (n=1,010)
Check-A-Ticket machine	66%	62%	60%	64%
Ask clerk to validate ticket	46%	46%	49%	51%
BCLC website	42%	37%	38%	39%
Internet	23%	28%	25%	26%
Request printout from clerk	18%	19%	20%	19%
Newspaper	11%	13%	14%	12%
Winning numbers as posted at retailer	8%	9%	9%	10%
Broadcast on TV as part of news	5%	4%	5%	5%
Somebody else does it for me	<1%	<1%	0%	<1%
Subscription checked automatically by BCLC	<1%	0%	0%	<1%
Other	1%	1%	1%	<1%
Don't know	0%	1%	<1%	1%

Base: Lottery players (n=693)

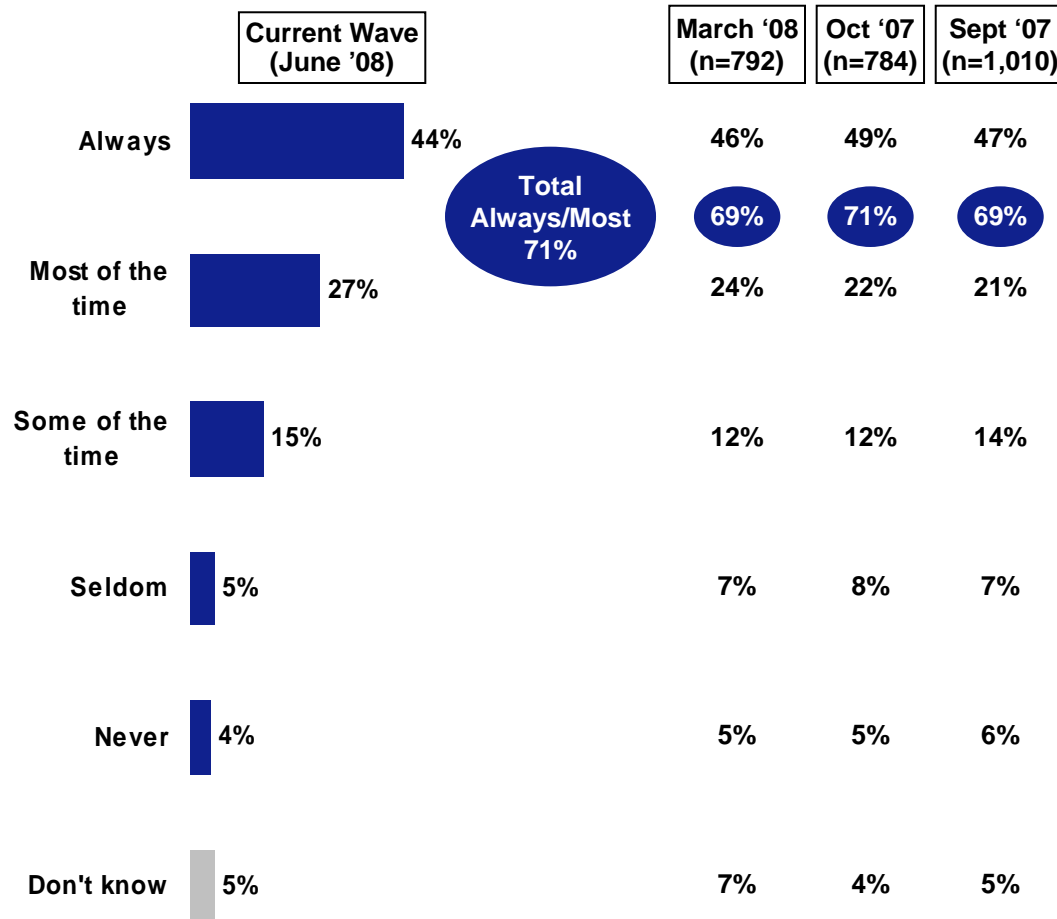
Highlights

- When checking their lottery tickets, most (66%) lottery players use a Check-A-Ticket machine.
- Nearly one-half (46%) of players have a retail clerk validate the ticket.
- While not impacting the ranking of number checking methods, slightly more players this wave mention using BCLC's website to check for winning numbers (up 5 points over last wave to currently sit at 42%).



How Often Receive Validation Slip

Q12. When a retail clerk checks your lottery tickets, how often do you receive a validation slip?



Highlights

- Unchanged over the last few waves, seven-in-ten lottery players say they receive a validation slip from a retail clerk the majority of the time.
- Only a small proportion (4%) say that they have never received a validation slip.

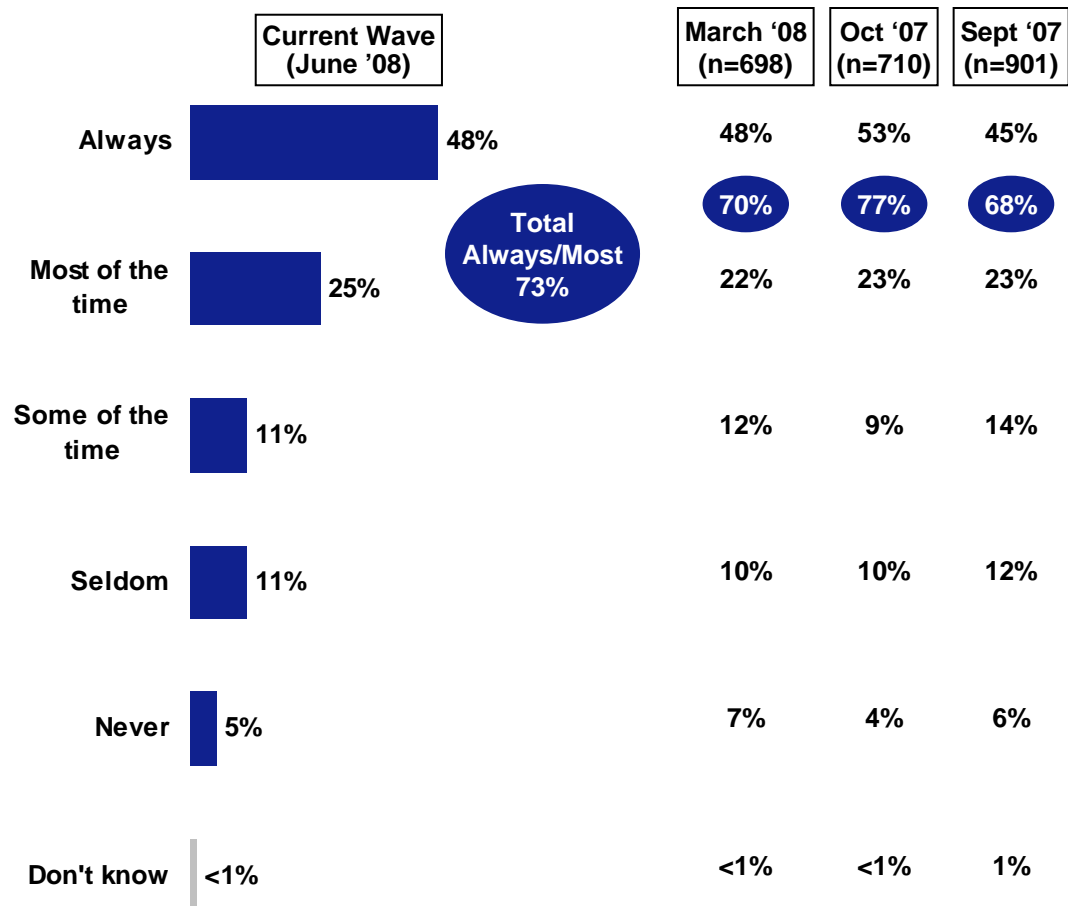
	Always/Most
LM	70%
Rest of BC	72%
Men	70%
Women	72%

Base: Lottery players (n=693)



How Often Review Validation Slips

Q13. How often do you review your validation slips?



Highlights

- As per previous waves, the large majority (73%) of lottery players say that they routinely review their validation slips.

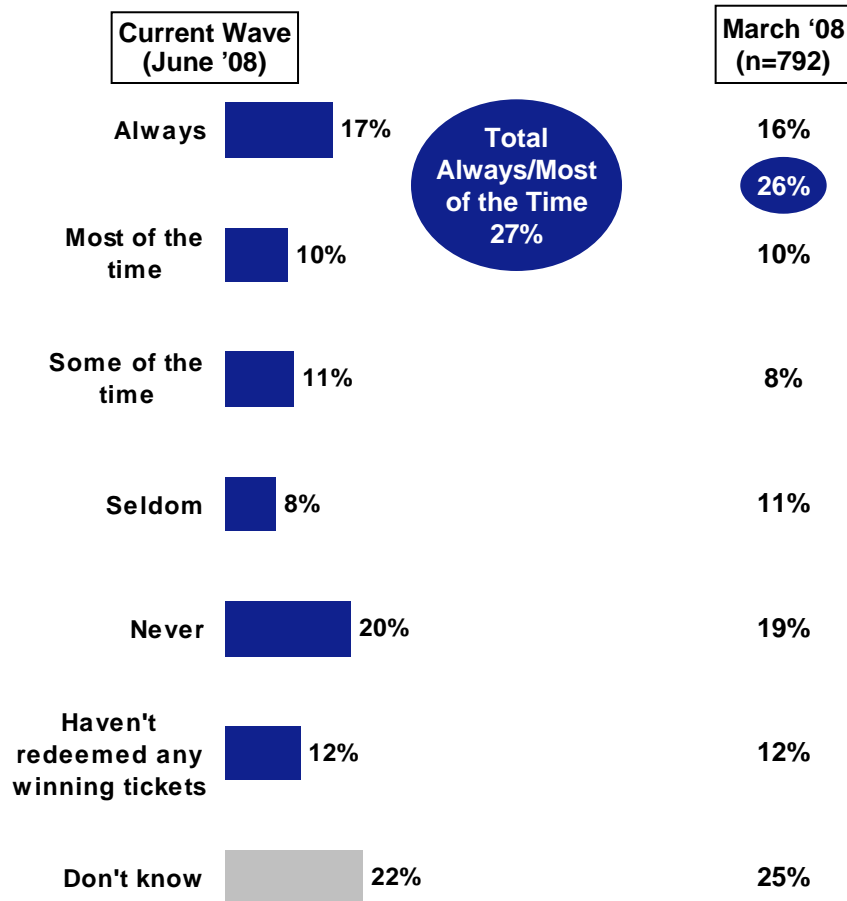
	Always/Most
LM	70%
Rest of BC	77%
Men	72%
Women	74%

Base: Receive validation slip (n=633)



How Often Retailer Stamped Winning Ticket

Q13b. When redeeming your winning tickets, how often does the retailer stamp the back of the ticket with a "Paid by Lottery Retailer" stamp?



Highlights

- Like last wave, only one-quarter (27%) of lottery players say that their winning tickets are regularly stamped with a "Paid by Lottery Retailer" stamp. Specifically, 10% say their ticket is stamped most of the time while 17% say that it is always stamped.
- Two-in-ten players however claim that they have never had their ticket stamped and a similar proportion (22%) are unsure.

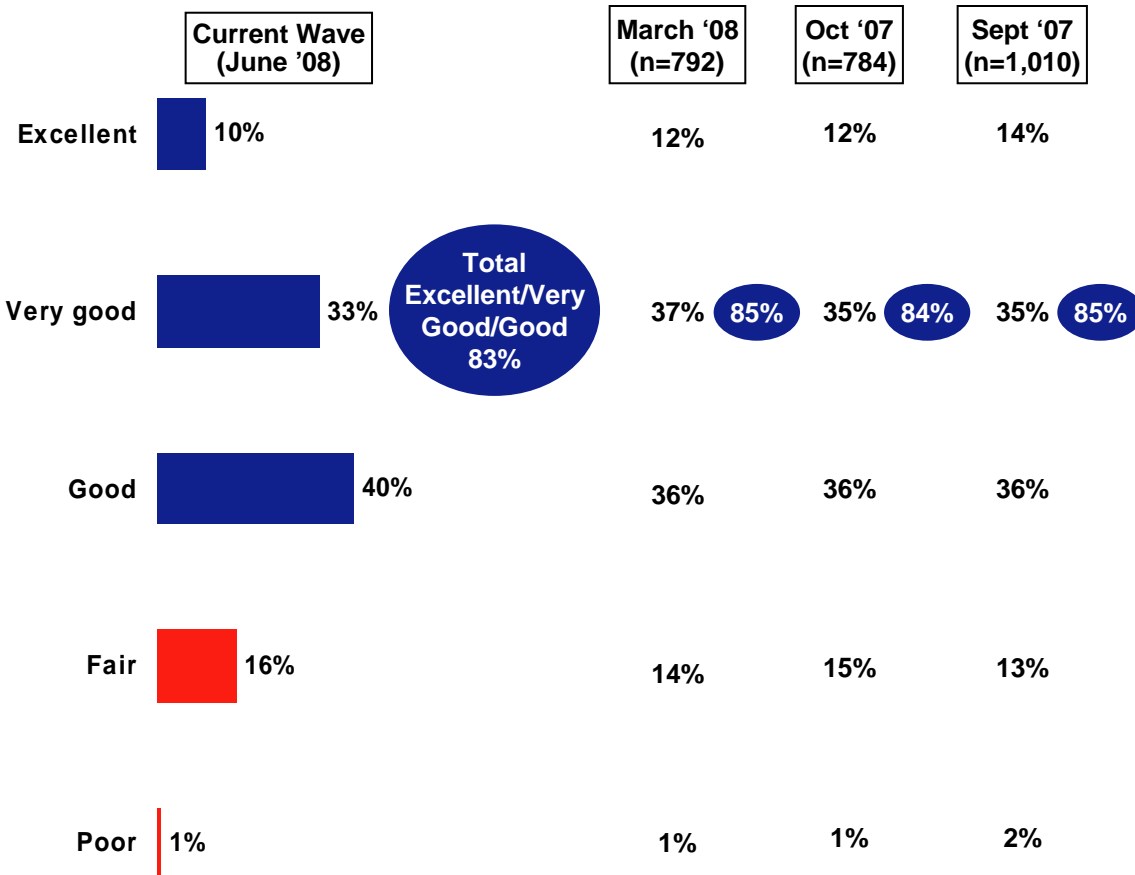
	Always/Most
LM	26%
Rest of BC	29%
Men	29%
Women	26%

Base: Lottery players (n=693)



Rating of Service Received from Retailers

Q14. How would you rate the overall service you receive from lottery ticket retailers?



Highlights

- As a whole, the overall level of service that players receive from retailers is positive.
- Specifically, 40% rate the service good, 33% rate it very good and 10% say the service is excellent.
- These results are unchanged since first recorded in September of last year.

	Excellent/Very Good/Good
LM	82%
Rest of BC	85%
Men	84%
Women	82%

Base: Lottery players (n=693)

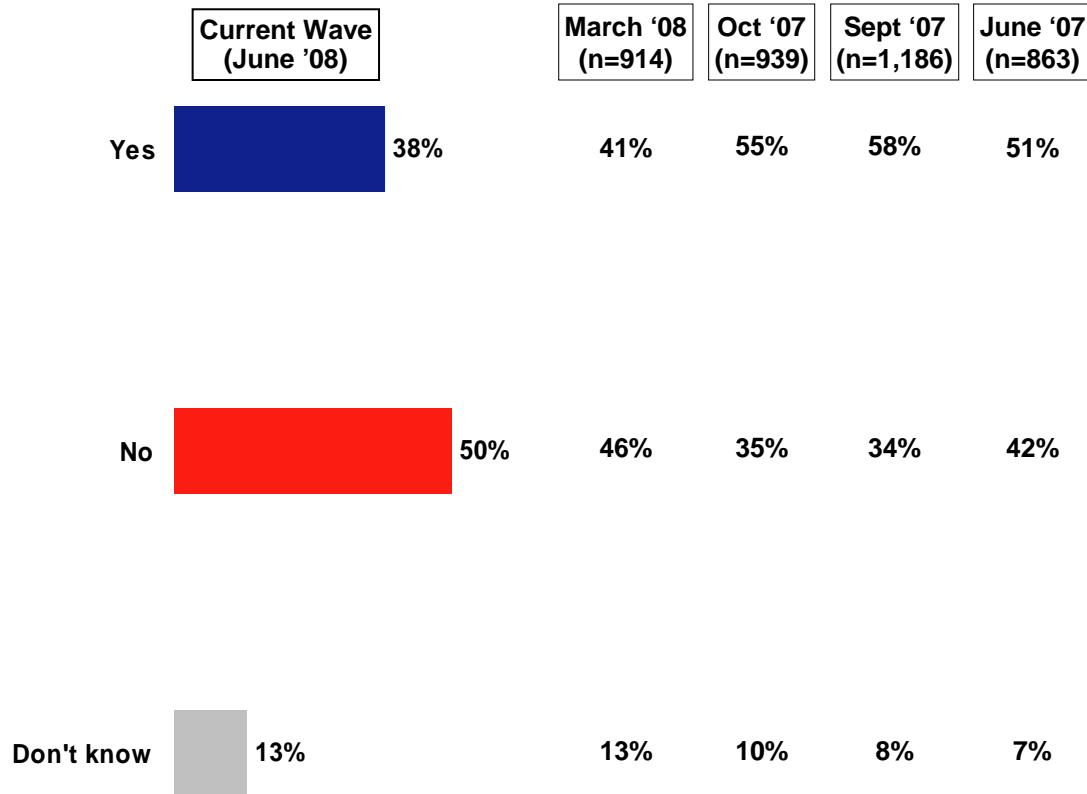


Overall Awareness of BCLC Actions

Q15. In the last few months (weeks in previous survey), have you read, seen or heard anything about actions taken by the BC Lottery Corporation to improve the integrity or fairness of its lottery games?

Highlights

- Like last wave, about four-in-ten (38%) of BC residents say they are aware of actions that BCLC is taking to improve the integrity or fairness of its lottery games.



	Yes, Aware
Players	42%
LM	38%
Rest of BC	37%
Men	44%
Women	32%

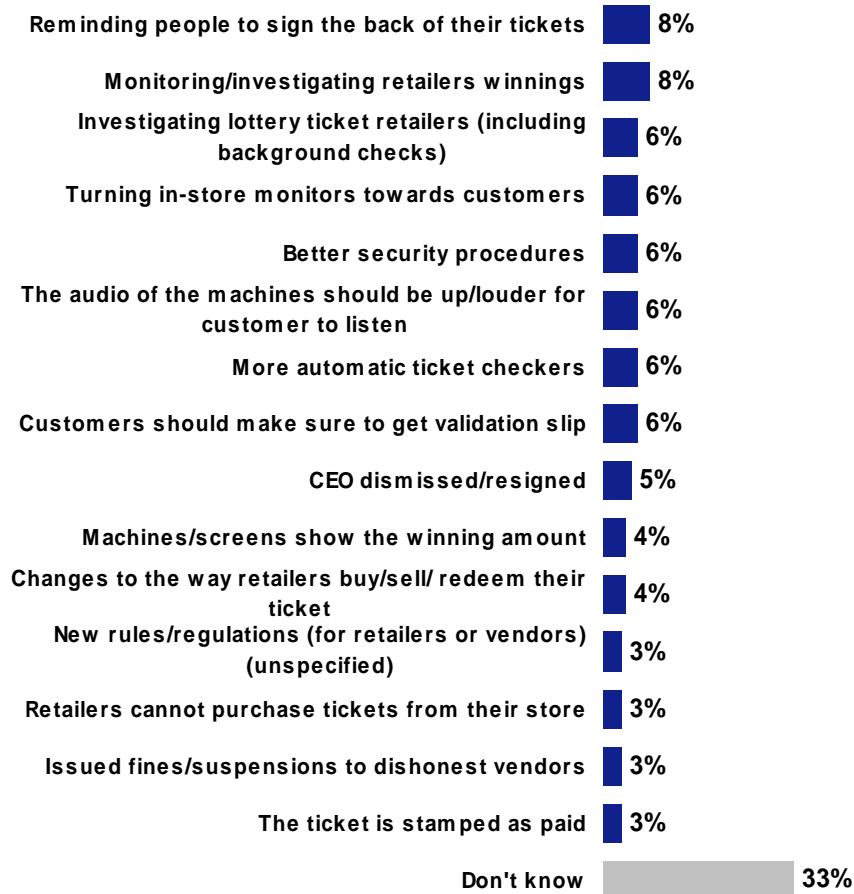
Base: All respondents (n=813)



Unaided Recall of Specific BCLC Actions

Q16. What specific action(s) by the BC Lottery Corporation have you read, seen or heard about?

Current Wave
(June '08)



Note: Only responses of 3% or more are shown.

Base: Heard about recent action(s) to improve integrity of BCLC (n=331)

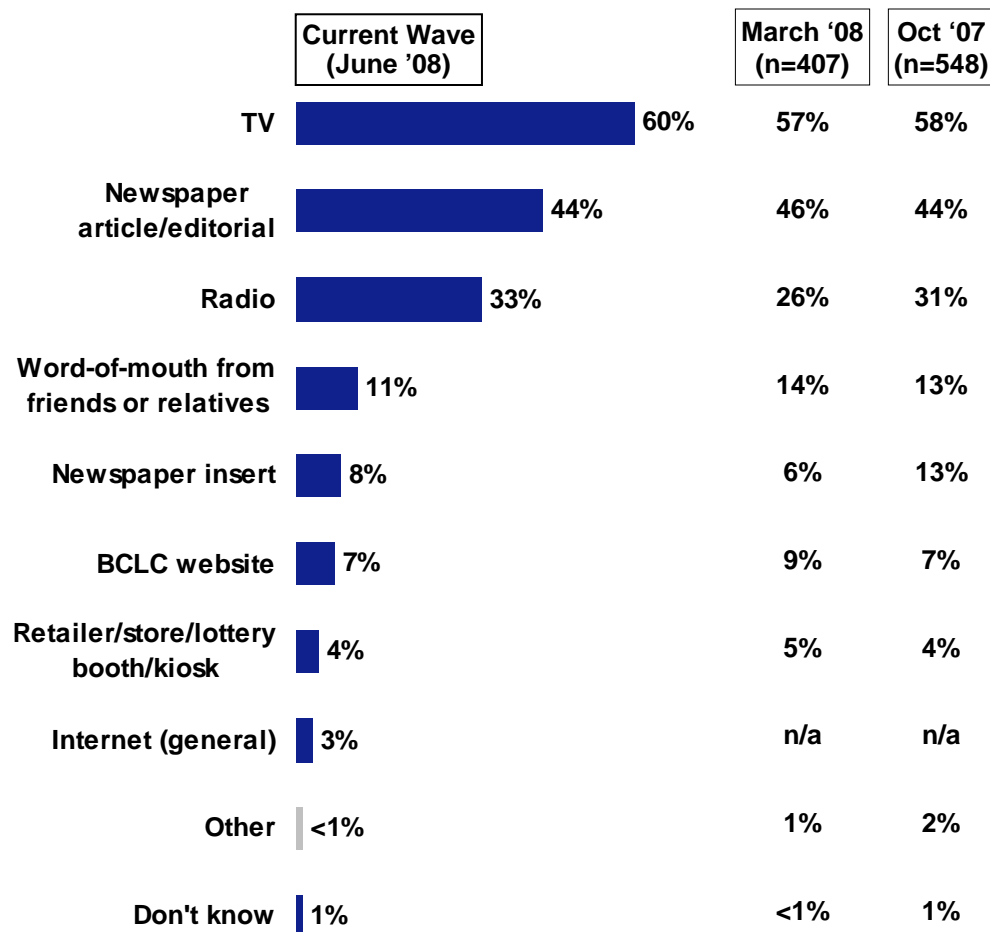
Highlights

- Among those who say they are aware of recent actions that BCLC is taking, one-third are unable to pinpoint any specifics.
- The remaining two-thirds do mention actions that indeed are being/have been taken by BCLC (or elements of specific actions), but no one activity is mentioned by more than 8% of respondents.



Where Recall BCLC Actions

Q16a. Where do you recall reading, seeing or hearing this information?



Highlights

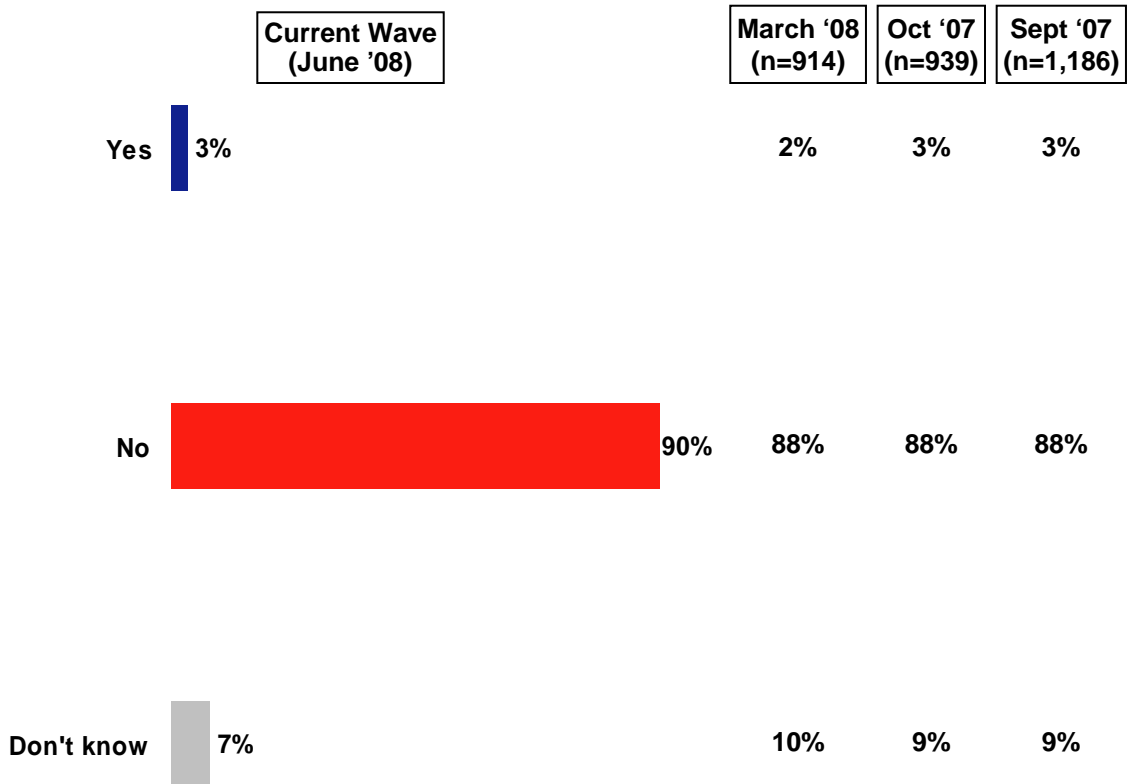
- Like last wave, most (60%) who are aware of recent BCLC actions say they learned about BCLC's initiatives on television.
- Following closely, 44% say they learned of BCLC actions by reading newspaper articles and 33% say they heard it on the radio.

Base: Heard about recent action(s) to improve integrity of BCLC (n=331)



Awareness of Player First Program

Q17. In the last few months, have you read, seen or heard anything about the BC Lottery Corporation's Player First program?



Highlights

- Consistent with all previous waves, very few (just 3%) BC residents recall anything about BCLC's Player First Program.

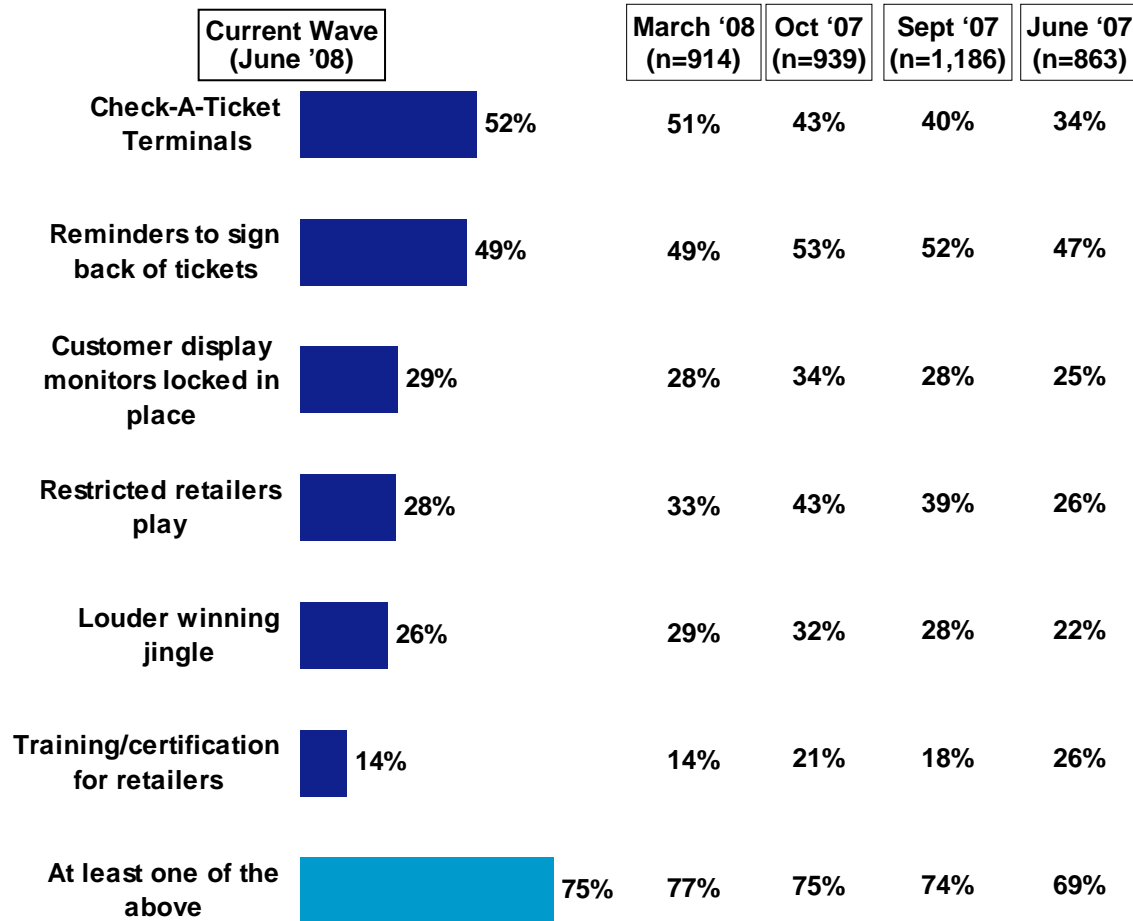
	Aware
Players	4%
LM	1%
Rest of BC	6%
Men	4%
Women	3%

Base: All respondents (n=813)



Aided Recall of Specific BCLC Actions

Q18. Which of the following actions taken by the BC Lottery Corporation have you read, seen or heard about prior to today?



Base: All respondents (n=813)

Highlights

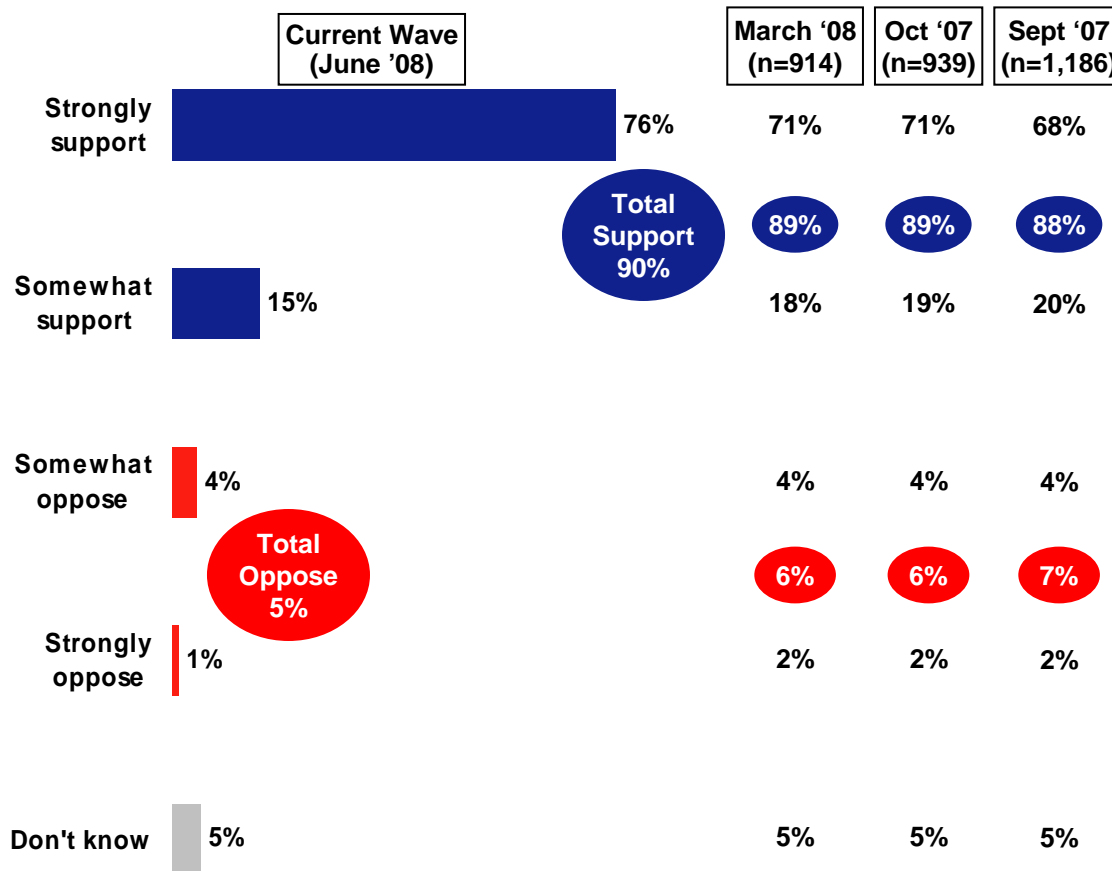
- Consistent with last wave, three-quarters (75%) of BC residents are aware of at least one action taken by BCLC.
- As expected, this awareness is higher among lottery players than among the general public.
- Of all of BCLC's actions, the two most familiar are the Check-A-Ticket terminals (52%) and the reminders to sign the backs of tickets (49%).

	Aware of At Least One Action
Players	88%
LM	79%
Rest of BC	81%
Men	81%
Women	80%



Support for Restricting Retailer Play at Work

Q19. As mentioned in the previous question, the BC Lottery Corporation's rules now restrict lottery retailers from purchasing, playing or validating personal lottery tickets at their location of employment. Do you support or oppose the BC Lottery Corporation's decision to restrict lottery retailers from playing at work?



Highlights

- Overall support for restricting retailer play is consistently strong. Nine in ten BC residents support this policy. Most notable is the degree to which residents support this decision – 76% “strongly” support it.
- Meanwhile just 5% oppose this and the remaining 5% are undecided (the undecided consist of mostly non-players).
- Lottery players are slightly more likely to support this decision.

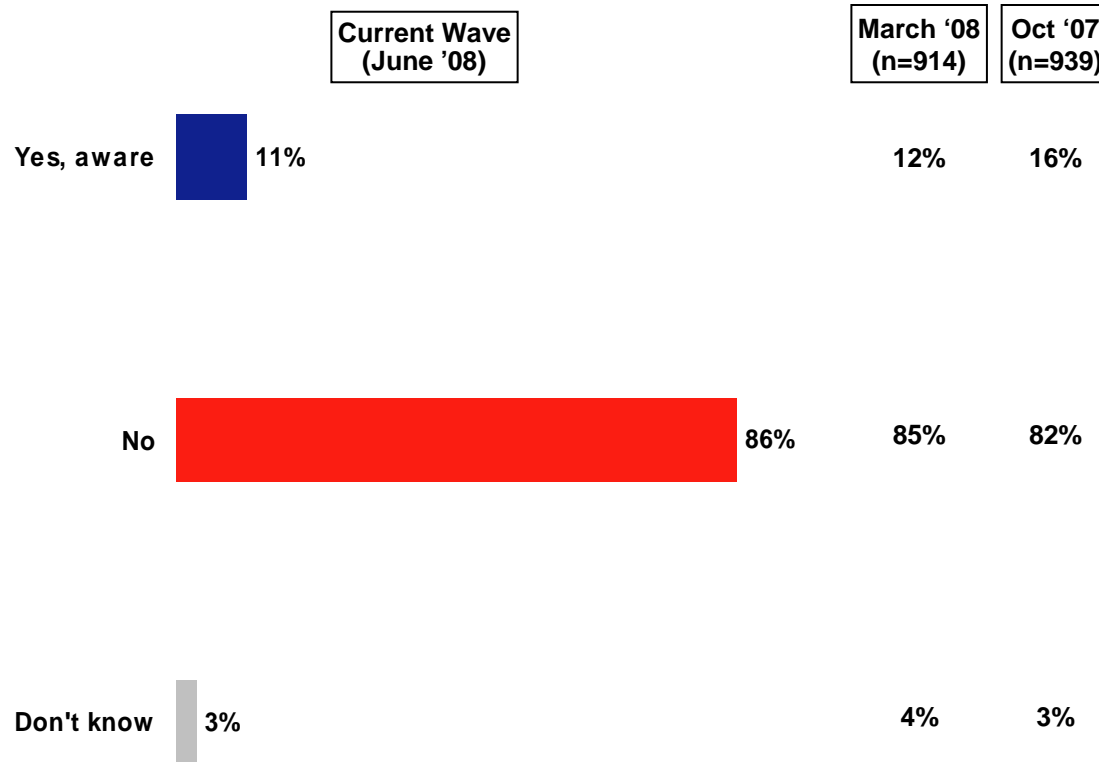
	Support	Oppose
Players	92%	5%
LM	91%	4%
Rest of BC	89%	6%
Men	90%	5%
Women	90%	4%

Base: All respondents (n=813)



Awareness of Change in Prize Claim Policy

Q19a. The BC Lottery Corporation has changed one of its policies regarding prize payouts. Prior to August 27th, retailers were allowed to pay out prizes up to \$3,000. Now, players with prize claims of \$1,000 or more must be directed to one of the BCLC Prize Payout Centres. Before today, were you aware of this change in policy?



Highlights

- Prior to this survey, only one in ten residents were aware that there has been a recent reduction in the prize claim amount that retailers are permitted to payout. This level of awareness is unchanged from last wave.
- Awareness of this policy changes is slightly more prominent among lottery players.

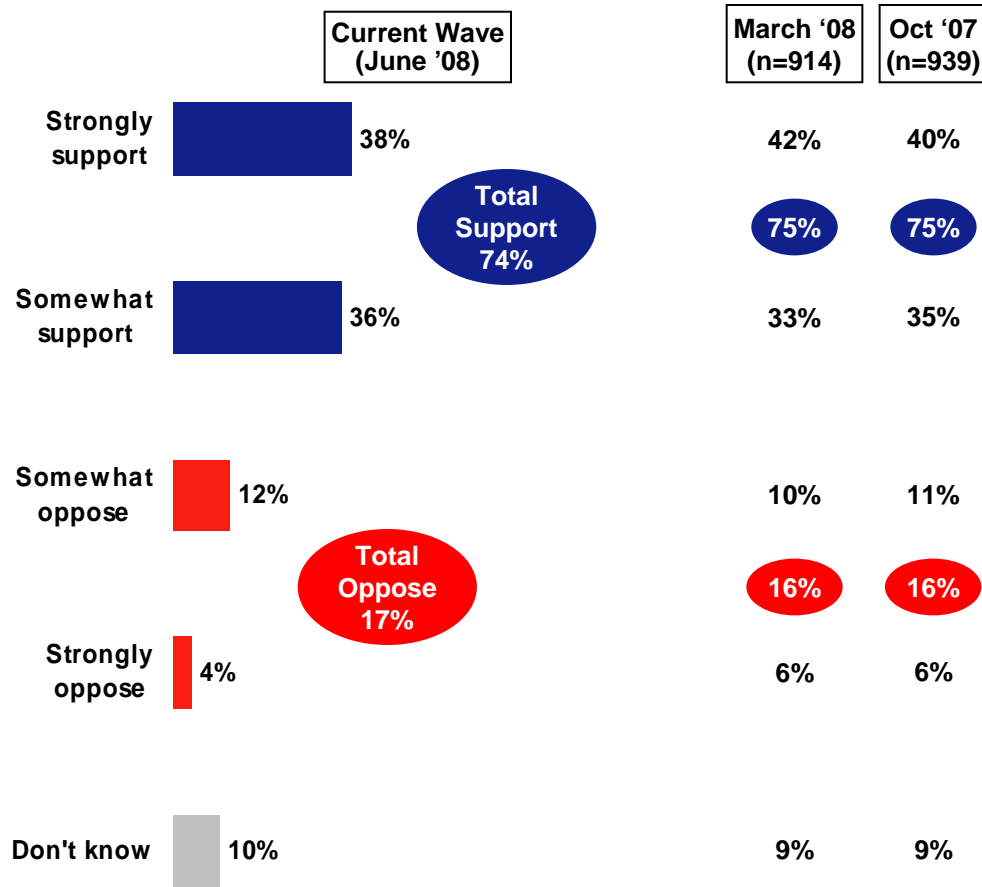
	Yes, Aware
Players	14%
LM	9%
Rest of BC	14%
Men	13%
Women	9%

Base: All respondents (n=813)



Support for Prize Claim Policy

Q19b. Overall do you support or oppose this change in policy?



Highlights

- Consistent with last wave, support for the new price payout policy is high (74% total support).

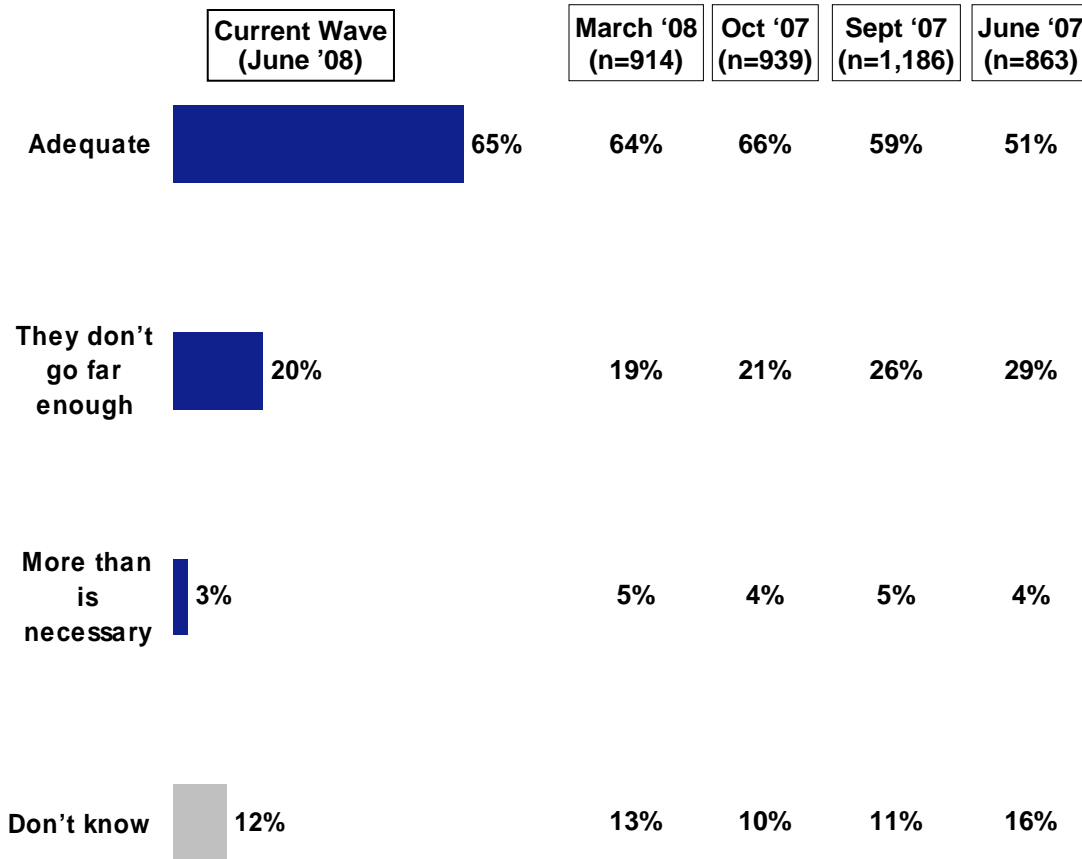
	Support	Oppose
Players	76%	20%
LM	76%	14%
Rest of BC	71%	21%
Men	73%	19%
Women	75%	15%

Base: All respondents (n=813)



Informed Impression of BCLC Actions

Q20. Based on all the actions we've described, what is your overall impression of the actions being taken by the BC Lottery Corporation?



Highlights

- Consistent with last wave, the majority (68%) of BC residents feel that BCLC is taking sufficient action. Specifically, 65% feel BCLC is taking the right amount of action, and 3% feel that BCLC is doing more than what is required.
- Only 20% of residents (players and non-players alike) feel that BCLC could be doing more.

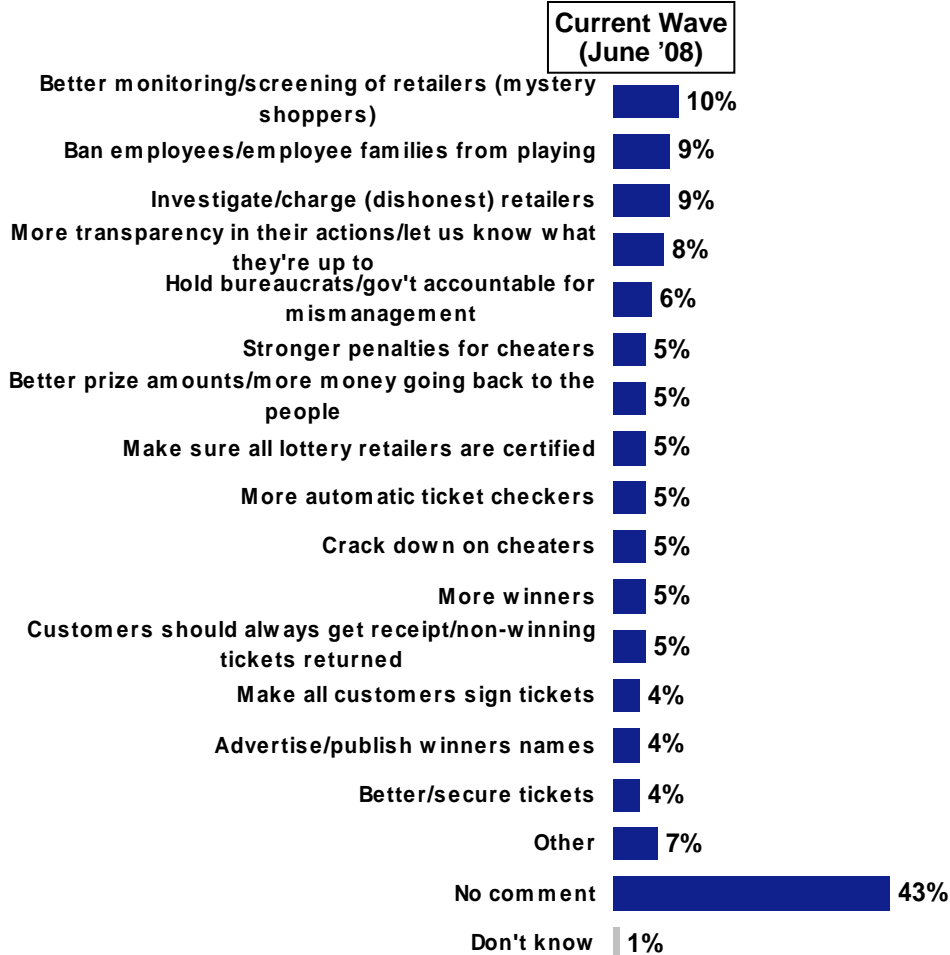
	Don't Go Far Enough
Players	21%
LM	20%
Rest of BC	21%
Men	22%
Women	18%

Base: All respondents (n=813)



Other Actions Would Like to See

Q20a. What other actions would you like to see taken by the BC Lottery Corporation to improve the integrity and fairness of its lottery games?



Note: Only responses of 4% or more are shown.

Base: Think actions don't go far enough (n=174)

Highlights

- Consistent with previous waves, among those who feel that BCLC is not taking sufficient action there is little consensus about what actions BCLC should take to improve the integrity and fairness of its lottery games.
- While 20% of residents think that BCLC isn't taking sufficient action, nearly half (43%) don't offer any suggestion at all for alternatives.