



Manitoba Liquor, Gambling, and Cannabis Survey II

Release date: December 2023

EXECUTIVE SUMMARY

The Liquor, Gaming and Cannabis Authority of Manitoba (LGCA) conducts prevalence surveys every three years to gather information about Manitobans' knowledge and behaviours related to liquor, gambling and cannabis and to monitor population trends. Collecting similar data at different time points tracks the evolution of Manitoban's consumption of alcohol and cannabis, as well as their participation in gambling activities. Additionally, tracking these changes helps to ensure that policy development and social responsibility initiatives are responsive to the changing needs of Manitobans. Research findings inform legislative and regulatory policy, operational decision making, training programs, and public education initiatives.

In 2022, the LGCA contracted Prairie Research Associates (PRA) to conduct a mixed-mode survey of a total of 1,604 Manitobans aged 18 and older. Between May 30 and June 28, 2022, PRA conducted an online panel survey of 1,381 Manitobans and 223 random-digit telephone surveys. This survey asked Manitobans questions regarding their alcohol and cannabis consumption and their participation in gambling activities (including pre-and post-pandemic), behaviours around setting limits of use, motivations for use, as well as their perceptions on LGCA public education initiatives.

This report highlights significant findings of the survey. It is intended for the LGCA's broad stakeholders, including government policymakers; industry regulators and operators; and the Manitoba public.

It is important to note that this survey was conducted prior to the release of Canada's Guidance on Alcohol and Health. The data on Manitobans' adherence to Canada's Low Risk Alcohol Drinking Guidelines (LRDGs) is based on the guidelines in place at the time the survey was conducted, which set weekly and occasional drink limits for men and women to reduce long-term health risks. Released in January 2023, Canada's Guidance on Alcohol and Health has since replaced the LRDGs to focus on a continuum of risk for harm associated with weekly alcohol use.

2022 HIGHLIGHTS

Liquor

81% of Manitobans reported drinking in the past 12 months, motivated primarily by social reasons. When consuming alcohol, 75% of Manitobans stated that they always used at least one lower risk drinking strategy to reduce risks related to alcohol consumption. The most common strategies used were pre-planning transportation, eating while drinking, and limiting the number of drinks. In terms of the impact of the COVID-19 pandemic on alcohol consumption, the majority of Manitobans (79%) indicated that the pandemic did not impact their alcohol consumption.

Gambling

80% of Manitobans reported participating in at least one gambling-related activity in the past 12 months. The most popular forms of gambling were lottery tickets, charity raffles/fundraising tickets, casino slot machines and VLTS, with each of their popularity increasing by several percentage points. Betting on sports online and betting on horse races were the least popular gambling activities, although their popularity also increased several percentage points (9% and 10% in 2022, compared to 1% and 5% in 2019, respectively). 84% of Manitobans reported that the COVID-19 pandemic did not impact how often they gamble.

Cannabis

32% of Manitobans reported consuming cannabis in the past 12 months, with those 25 to 34 years old reporting the highest rates (54%) of cannabis use. Manitobans used cannabis for both recreational and medicinal reasons and were most likely to have purchased cannabis from a licensed retailer (69%). Among all Manitobans surveyed, 92% reported the COVID-19 pandemic did not impact their cannabis use. For cannabis users, 23% indicated the pandemic made them use cannabis more often.

ALCOHOL

ALCOHOL USE IN MANITOBA

ALCOHOL USE IN LAST 12 MONTHS

For the survey, a drink was defined as a:

- 12-ounce bottle, can or glass of beer (341ml, 5% alc./vol.);
- 5-ounce glass of wine (142ml, 12% alc./vol.); or
- 1.5 ounces of liquor (43ml, 40% alc./vol.).

In 2022, 81% of Manitobans reported that they had consumed at least one drink containing alcohol in the past 12 months. This is down slightly from 84% in 2019, but closer to the 76% of Manitobans identified in the 2019 Canadian Alcohol and Drug Use Monitoring Survey (Government of Canada, 2021).

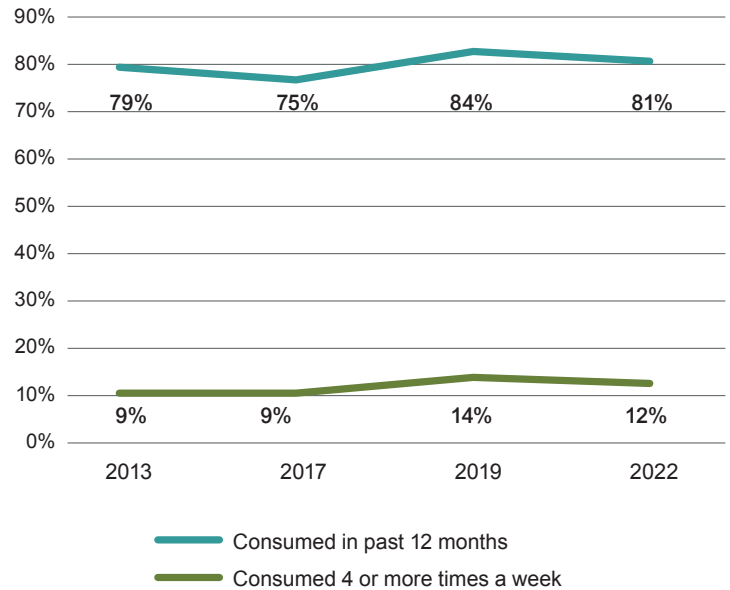
Key demographic differences. Manitobans aged 18 to 24 (65%) were least likely to report having consumed alcohol in the past 12 months. The number of drinks consumed per week increased with age, with 3% of those aged 18 to 24 reporting consumption of four or more drinks per week, compared to 19% of those aged 65 and older. Men were twice as likely (16%) as women (8%) to report drinking four or more times a week, and consumption of alcohol four or more times a week increased as household income increased.

CHANGES IN ALCOHOL CONSUMED MONTHLY

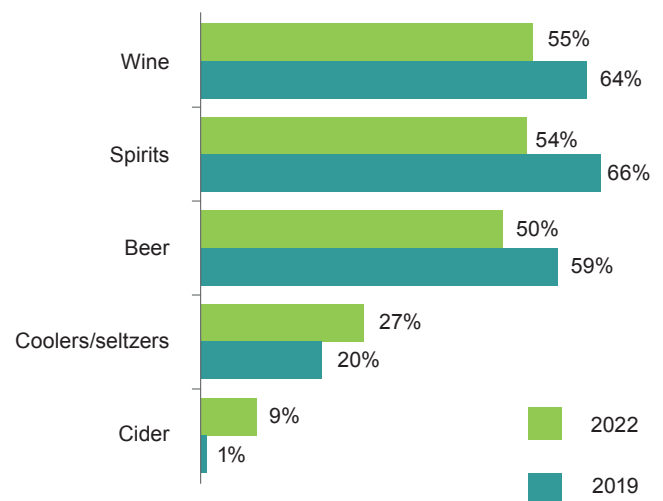
Compared to 2019, there appeared to be a shift in the types of alcohol that Manitobans normally drink (among those who reported drinking at least monthly). Most notably, there was an increase in consumption of coolers/seltzers (from 20% in 2019 to 27% in 2022), and ciders (1% to 9%), with a decrease in wine (64% to 55%), spirits (66% to 54%), and beer (59% to 50%).

Key Demographic Differences. Age played a role in the type of alcohol Manitobans reported normally consuming. Consumption of coolers/seltzers decreased with age (from 61% of 18- to 24-year-olds to 7% of those 65 and older) and 18- to 24-year-olds were least likely to consume beer and wine. Men were more likely than women to report consuming beer and spirits, but less likely to consume wine and coolers/seltzers. Consumption of wine and beer increased as household income increased.

Manitoban's Alcohol Use



Types of Alcohol Consumed at least Monthly



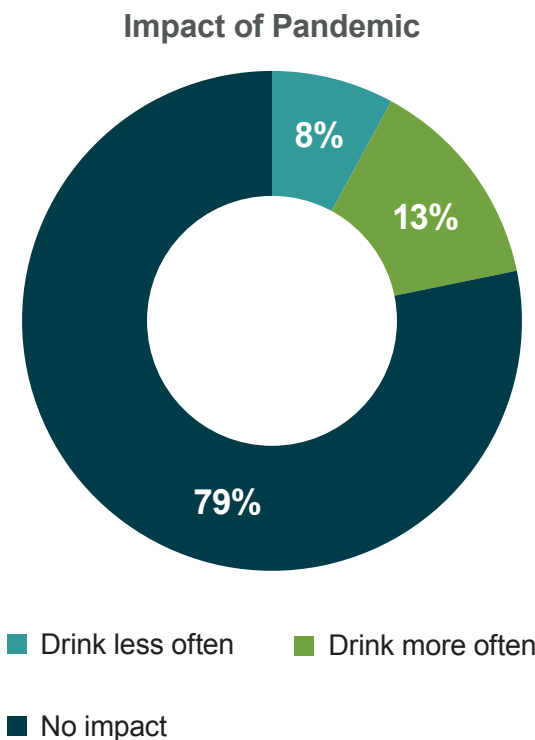
Note:

Alcohol consumers could report more than one type of alcohol.

IMPACT OF PANDEMIC ON ALCOHOL CONSUMPTION

Among Manitobans, 79% reported that the pandemic did not impact their alcohol consumption, while 13% indicated that it caused them to drink more often. The remaining 8% said the pandemic caused them to drink less often.

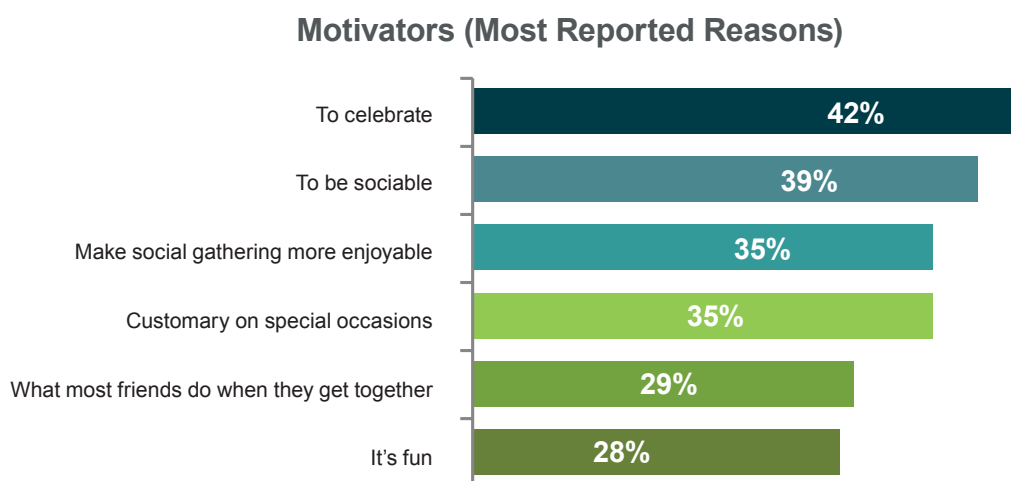
Key Demographic Differences. Manitobans 18 to 24 (16%) were most likely to report drinking less often because of the pandemic, while 25- to 34-year-olds (25%) were most likely to report drinking more often. As household income increased, so did the proportion of individuals who reported drinking more often.



MOTIVATORS FOR CONSUMING ALCOHOL

Alcohol consumers were asked about 15 different reasons typically given for drinking. The most common motivators were related to drinking with others or to enhance what may be seen as positive experiences (e.g., to celebrate). These results are similar to results from 2019.

Key Demographic Differences. Generally, younger Manitobans were more motivated by all factors asked. There was little difference between men and women in their motivations for drinking.



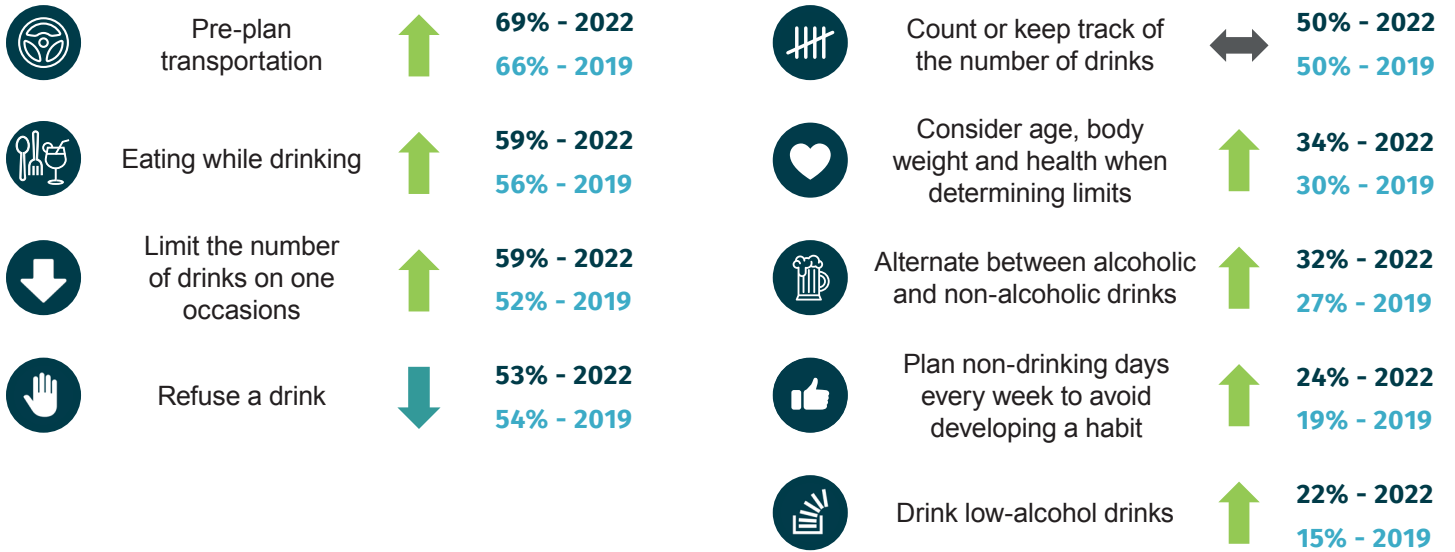
LOWER-RISK DRINKING STRATEGIES

Manitobans' use of strategies to lower risk when drinking has increased from 2019 to 2022. Among the nine strategies, Manitobans were most likely to report that they pre-plan transportation when drinking (69%); which is up three percentage points from 2019 (66%). The greatest increase was for consuming low-alcohol drinks, which rose from 15% to 22%.

On average, Manitobans who consumed alcohol reported always using two risk reduction strategies, with 75% always using at least one strategy. The proportion of Manitobans who reported always using at least one strategy is similar to 2019 (74%).

Key Demographic Differences. Women (82%) were more likely than men (66%) to always use a strategy. In addition, younger and lower-income Manitobans were more likely to always use multiple strategies.

Use of Lower-risk Drinking Strategies - Often or Always

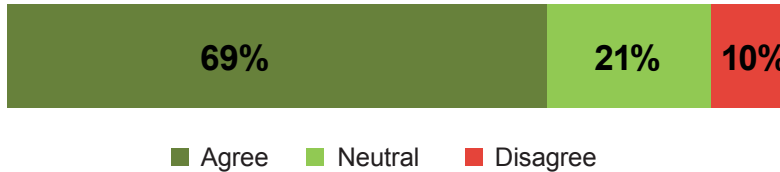


AGREEMENT THAT ALCOHOL SHOULD HAVE WARNING LABELS

Among all Manitobans, 7 in 10 agreed that there should be warning labels on alcohol about health risks of drinking alcohol, including 36% who strongly agreed.

Key Demographic Differences. Support for warning labels on alcohol was lowest among men and 35- to 44-year-olds. There was also a considerable difference in agreement between those who consumed alcohol (64%) and those who have not consumed alcohol (86%) in the past year.

Agreement that Warning Labels should be on Alcohol



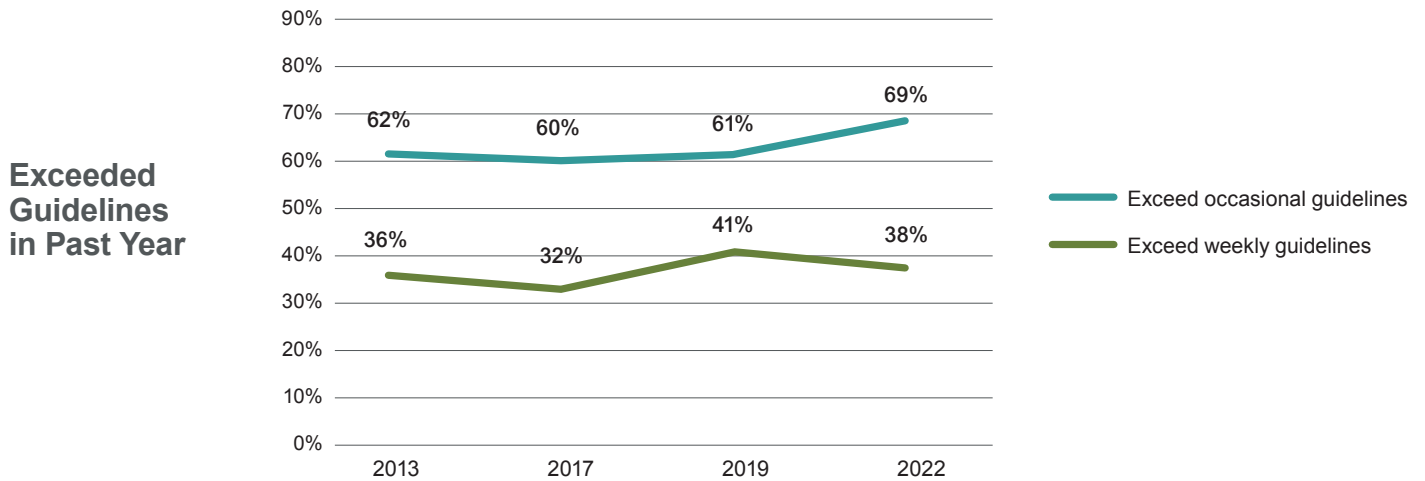
ADHERENCE TO CANADA'S LOW-RISK DRINKING GUIDELINES

In 2011, the Canadian Centre on Substance Use and Addiction (CCSA) released Lower-Risk Drinking Guidelines (LRDGs) to inform Canadians about limits that would reduce the risks associated with drinking alcohol. Guidelines in place at the time the survey was conducted were based on the following components:¹

- **Weekly guidelines** – no more than 10 drinks for women or 15 drinks for men per week
- **Occasional guidelines** – no more than three drinks for women or four for men per occasion.

Among those who consumed alcohol in the past year, 38% exceeded the weekly guidelines and 69% exceeded the occasional guidelines at least once. Over time, results have been fairly stable, although the proportion of those who reported exceeding occasional guidelines is the highest to date.

Key Demographic Differences. Exceeding the weekly or occasional guidelines was less likely among older Manitobans. There is some evidence to suggest that those in higher income groups were more likely to exceed the guidelines.



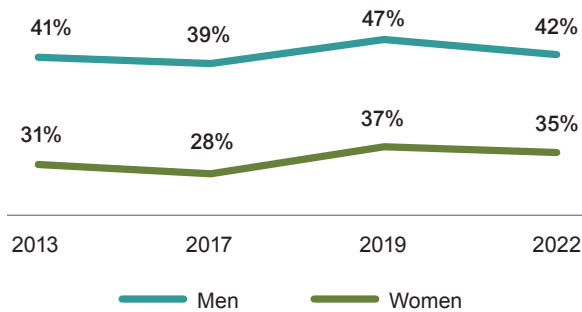
¹ The survey was conducted in the spring of 2022, and results are compared to the LRDG that were in place during that time. They do not reflect Canada's new Guidance on Alcohol and Health released in January 2023.

ADHERENCE TO CANADA'S LRDG BY GENDER

WEEKLY GUIDELINES

When assessed based on adherence to Canada's weekly drinking guidelines, men were consistently more likely to exceed their weekly limit, although the gap between men and women was the smallest it has been to date at seven percentage points (42% versus 35%).

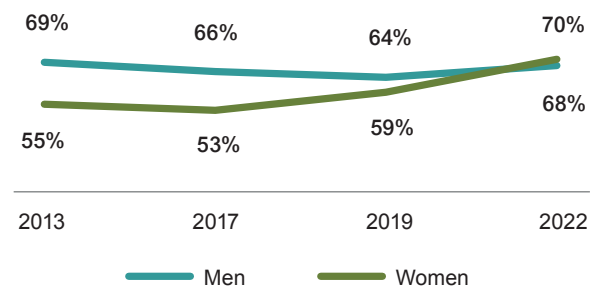
Exceed Weekly Guidelines by Gender



OCCASIONAL GUIDELINES

Results for 2022 marked a significant change in adherence to occasional guidelines, as women were more likely than men to have exceeded their occasional guidelines for the first time. While results for men have been fairly stable over the past four years, the proportion of women who exceed the occasional guidelines increased for two consecutive surveys.

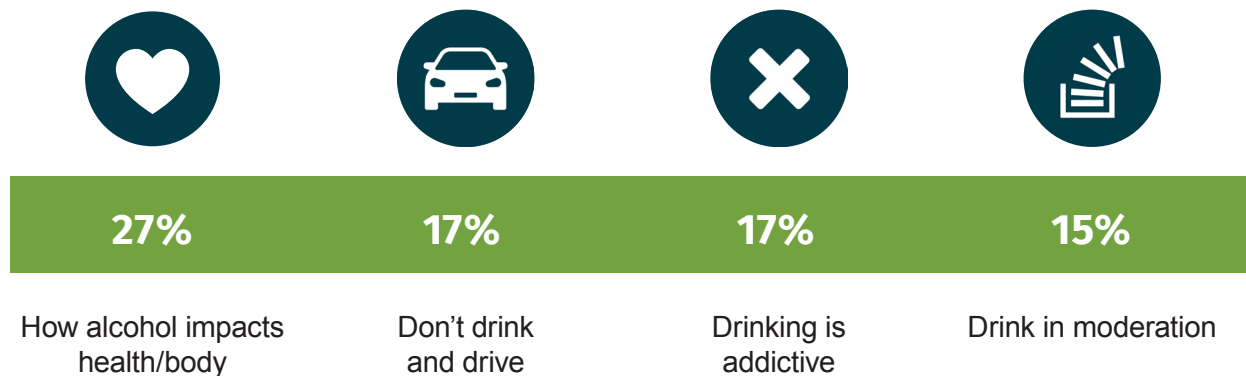
Exceed Occasional Guidelines by Gender



PUBLIC EDUCATION MESSAGING

When asked what public education messages the LGCA should provide in order to improve public safety around alcohol use, Manitobans most often mentioned topics related to physical or health impacts on individuals (e.g., how it impacts their health or its addictive properties) or how to use it responsibly (e.g., not to drink and drive or to drink in moderation).

Top Messaging Related to Alcohol



GAMBLING

GAMBLING IN MANITOBA

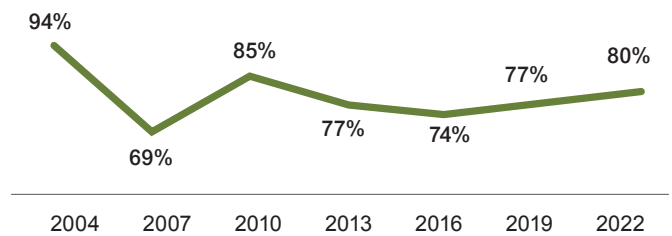
Manitobans were asked about their participation in 13 different gambling-related activities. Compared to 2019, Manitobans were more likely to have participated in each gambling type in the past year. This could be a result of pandemic related casino closures or a shift in online gambling preferences following legalization of single-event sports betting in August 2021. Additional research is required to more fully understand the impact of these two changes on gambling preferences in Manitoba.

Respondents were classified as a gambler if they had participated in one of the 13 gambling activities at least once a year (excluding those playing online without using real money), or if they had participated in four or more activities less than once a year. On this basis, 80% of Manitobans surveyed were classified as gamblers.














In addition to Manitobans being more likely to have participated in various gambling activities in 2022, the proportion defined as gamblers increased from 77% in 2019 to 80% in 2022.²

Key demographic differences. The biggest difference in gambling behaviour was found among income groups. Those with the lowest household income (under \$20,000 annually) were least likely to be classified as a gambler at 62%, while those in the highest income group (over \$100,000 annually) were most likely to be classified as a gambler (87%).

Manitobans Classified as Gamblers Over Time



Manitobans' Participation in Gambling: At Least Once a Year

	Lottery tickets	↑	60% - 2022 53% - 2019		Play sports lotteries	↑	16% - 2022 12% - 2019
	Charity raffle or fundraising tickets	↑	59% - 2022 53% - 2019		Bet money with friends or family	↑	16% - 2022 7% - 2019
	Slot machines at casinos	↑	26% - 2022 21% - 2019		Table games at casinos	↑	12% - 2022 7% - 2019
	Video lottery terminals	↑	22% - 2022 16% - 2019		Poker	↑	11% - 2022 6% - 2019
	Bet online without real money	↑	19% - 2022 11% - 2019		Bet online (excluding sports)	↑	11% - 2022 3% - 2019
	Bingo	↑	19% - 2022 7% - 2019		Bet on horse races	↑	10% - 2022 5% - 2019
					Bet on sports online	↑	9% - 2022 1% - 2019

² The results for 2019 differ from results previously reported by the LGCA because the analysis included those who only gambled on two or three types of gambling less than once a year as gamblers, when they should have been classified as non-gamblers.

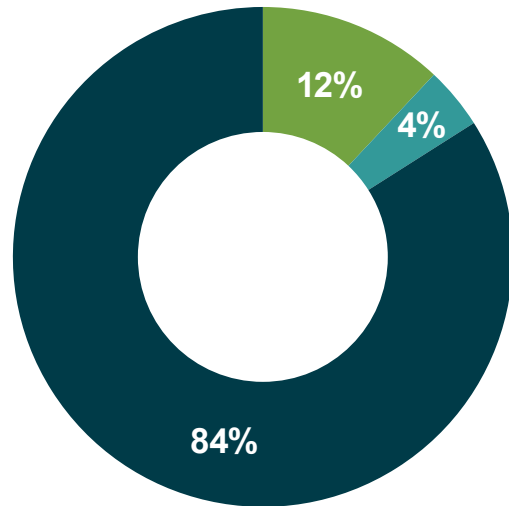
IMPACT OF PANDEMIC ON GAMBLING

Among Manitobans surveyed, 84% reported the pandemic did not impact how often they gamble, while 4% stated it caused them to gamble more often and 12% indicated it caused them to gamble less often. Among gamblers, 15% reported they gambled less often versus 5% who gambled more often.

Of particular interest is the difference between self-reported impacts of the pandemic on gambling habits, and the actual participation rate as noted previously. While only 4% of respondents indicated the pandemic caused them to gamble more often, participation rates increased for many types of gambling compared to 2019. Additional research will be required to fully assess the impact of the pandemic on gambling habits in Manitoba.

Key Demographic Differences. Results on the impact of the pandemic and gambling were most mixed among those under 35. This age group had the most respondents reporting both that they gambled less often and the most respondents saying that they gambled more often due to the pandemic.

Impact of Pandemic on Gambling

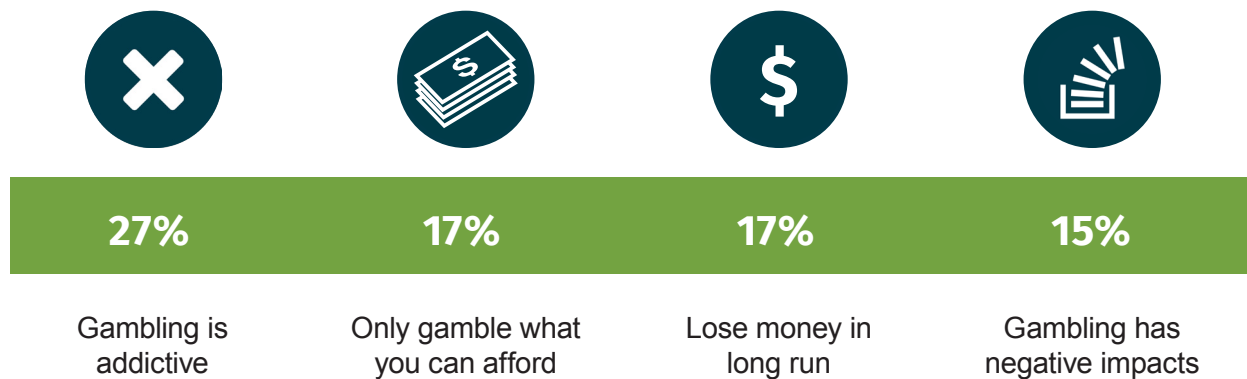


- Gamble less often
- Gamble more often
- No impact

PUBLIC EDUCATION MESSAGING

When asked what public education messaging the LGCA should provide related to improving public safety around gambling, Manitobans most often mentioned factors about the downsides of gambling, such as being addictive, that people are likely to lose money in the long run, and that gambling has negative impacts (e.g., financial, home life, family).

Public Education Messaging



CANNABIS

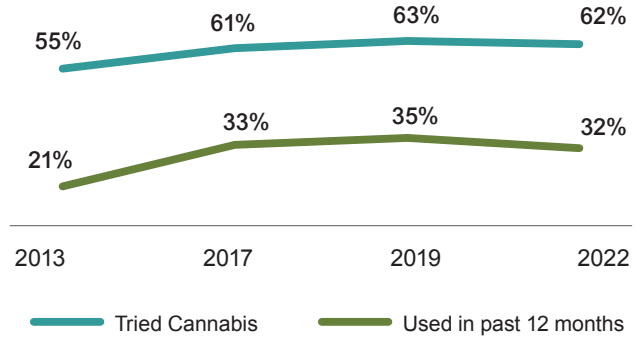
CANNABIS USE IN MANITOBA

CANNABIS USE IN MANITOBA

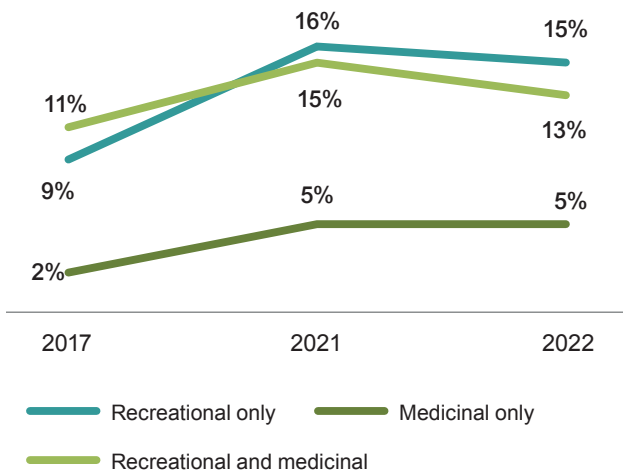
Although there was an increase in cannabis use after legalization, results from the LGCA's past three surveys do not indicate any further growth in recent cannabis use (past 12 months). The reported rate of use in Manitoba among those 19 or older (the legal age for using cannabis in Manitoba) was 32%, which is higher than the national average of 25% measured by the 2021 Canadian Cannabis Survey.

Key Demographic Differences. Cannabis use in the past year was highest among 25- to 34-year-olds (54%) and decreased with age for those 35 and older. Those who consumed alcohol in the past 12 months (36%) were twice as likely to have used cannabis in the past 12 months, compared to non-consumers of alcohol. (18%).

Cannabis Use in Past 12 Months and Tried in Lifetime



Cannabis Use in Past Year



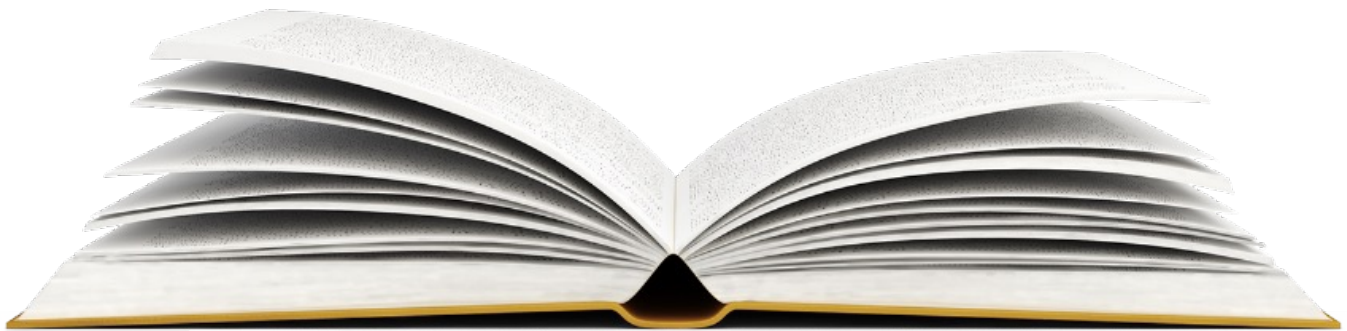
CHANGE IN RECREATIONAL AND MEDICINAL USE

The initial increase post-legalization was largely recreational; however, the slight decline in 12-month cannabis use from 2021 to 2022 is mostly due to a slight decline in Manitobans using for both recreational and (reported) medicinal use.

HOW MANITOBANS OBTAINED CANNABIS

Among cannabis users, Manitobans were most likely to have purchased cannabis from a licensed store (69%), while others got it from a friend or family member (24%) or by ordering online (20%).

Key Demographic Differences. Of interest, there is very little difference among demographic groups in where they acquired cannabis.

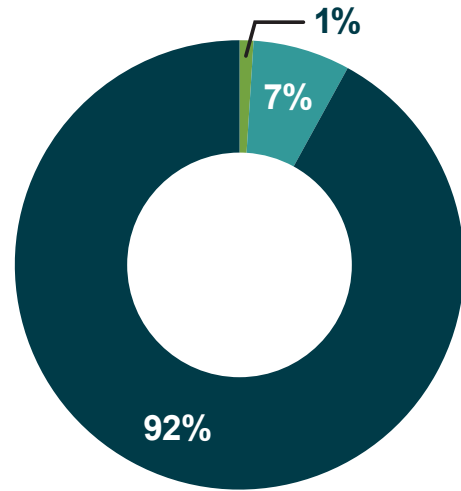


IMPACT OF PANDEMIC ON CANNABIS USE

Among Manitobans surveyed, 92% reported the pandemic did not impact their cannabis use, while 7% indicated it caused them to use cannabis more often. The remaining 1% of Manitobans reported it caused them to use it less. Among cannabis users who reported use in the past 12 months, 23% indicated that they were using more often following the pandemic, while 2% reported using less often.

Key Demographic Differences. Manitobans 25 to 34 (20%) were most likely to report they were using cannabis more following the pandemic. Men and women both reported using cannabis more and less often.

Impact of Pandemic on Cannabis Use



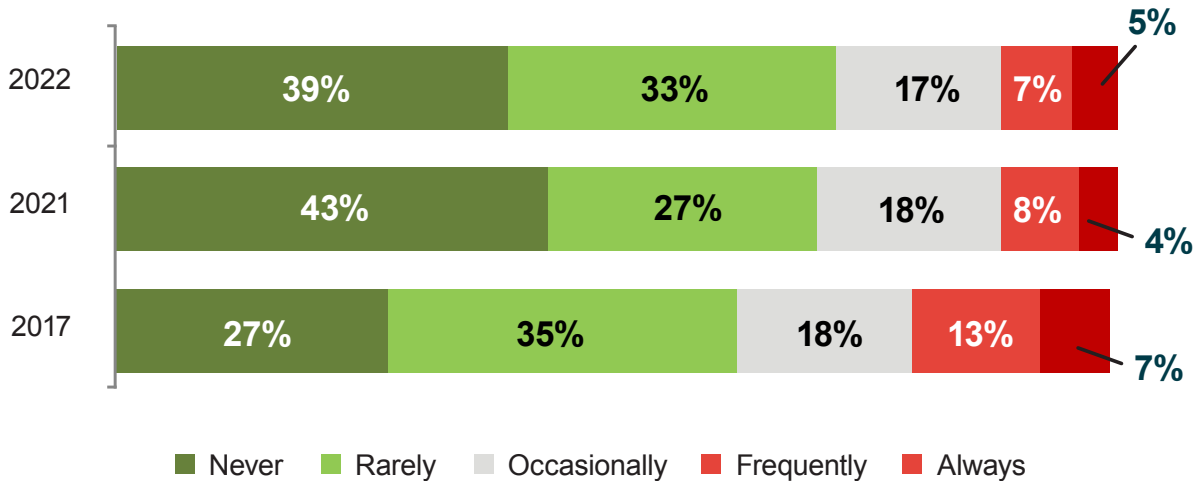
■ Use cannabis less often ■ Use cannabis more often ■ No impact

CANNABIS AND ALCOHOL USE

Among cannabis users, 39% reported never using cannabis in combination with alcohol, while 5% indicated they always use them in combination. These results are in line with results from the LGCA's Manitoba Cannabis Survey II conducted in 2021.

Key Demographic Differences. Among cannabis users, alcohol use with cannabis tended to differ by region as 8% of Winnipeggers said they always use cannabis and alcohol together, compared to 1% of non-Winnipeggers. Combining cannabis and alcohol was less frequent among older Manitobans.

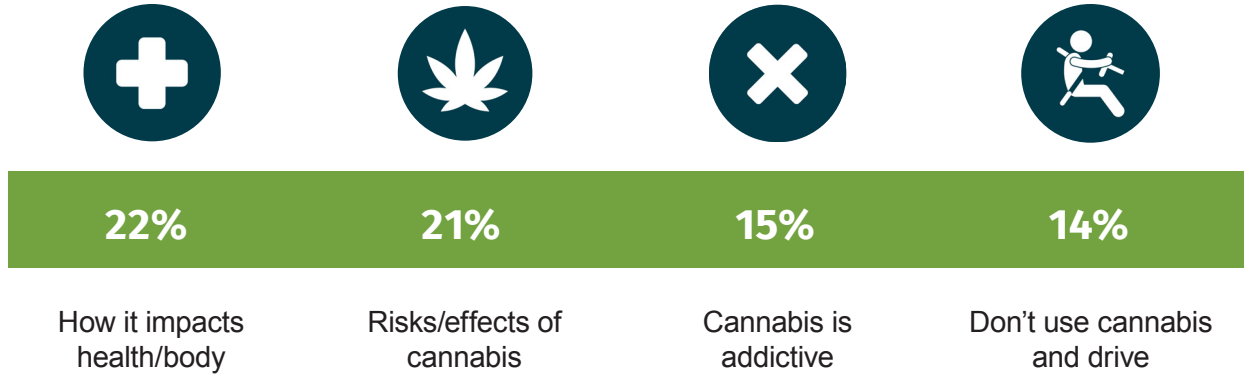
Cannabis and Alcohol Use



PUBLIC EDUCATION MESSAGING

When asked what public education the LGCA should provide related to improving public safety around cannabis, Manitobans' comments were very similar to public education suggested for alcohol messaging (shown previously), in that it appears to be a combination of the impacts of use and how to use cannabis responsibly.

Top Messaging Related to Cannabis



A FINAL THOUGHT

This survey was conducted in spring 2022, prior to the release of Canada's new Guidance on Alcohol and Health in January 2023, replacing Low-Risk Alcohol Drinking Guidelines (LRDGs). As guidelines change, it is important to regularly assess how the industries we regulate, our clients and stakeholders, and Manitobans in general are impacted. In April 2022, the LGCA became the new regulator for horse racing in Manitoba and it will be important, therefore, to consider this industry in future research and reports. The information provided in this report continues to build the LGCA's empirical base for policy and legislative decision-making. The LGCA will continue to collect comprehensive data in the Manitoba context to inform its regulatory framework and social responsibility initiatives.

ACKNOWLEDGEMENTS

The LGCA is grateful to the Manitobans who participated in this research, to PRA Inc. for their skilled data collection and to LGCA's ethics review panel for their suggestions and comments.

METHODOLOGY

The LGCA contracted PRA Inc., a social research firm, to conduct a mixed-mode survey of Manitobans 18 years and older, using an online research panel as the primary mode of conducting the survey. The sample was supplemented with a random-digit telephone survey to reach under-represented populations. The LGCA developed the questionnaire based on previous surveys, existing psychometric survey instruments, and feedback from the LGCA's external ethics panel. PRA Inc. provided feedback on the questionnaire based on their expertise and telephone pre-tests (n = 10) to improve the flow and comprehension of survey questions.

Sampling techniques ensured representation from the major regions of the province, including Winnipeg, Brandon, southern, and northern. The online panel survey took place between May 30 and June 24, 2022, with 1,381 completed surveys and an average completion time of just under 16 minutes. Response rate for the online panel was 27% (though there are no industry standards for calculating panel response rates).

Telephone surveying supplemented the sample in regions where the online panel would not meet desired quota (specifically in Brandon and northern regions). The telephone-sampling frame included both landline and cell phone numbers. The telephone response rate was 14% and average completion time for the survey was just over 18 minutes. Telephone fielding took place from June 8 to June 28, 2022, with 223 participants, for a combined total sample of 1,604.

Outcomes for the survey can be found in the table below.

	Panel	Telephone	Total
Total attempted (A)	7,804	14,818	22,622
1. Not in service	730	4,986	5,716
2. Fax	-	39	39
3. Business or non-residence	-	68	68
Total eligible (B)	7,074	9,725	16,799
4. Busy	-	719	719
5. Answering machine	-	3,993	3,993
6. No answer	4,930	1,574	6,504
7/8. Language/illness/incapability	-	142	142
9. Eligible respondent not available	-	108	108
Total asked (C)	7,074	3,189	10,263
10. Household refusal	-	28	28
11. Respondent refusal	-	1,819	1,819
12. Qualified respondent break off	220	19	239
Cooperative contacts (D)	1,924	1,323	3,247
13. Disqualified	543	1,100	1,643
14. Completed interviews	1,381	223	1,604
Refusal rate = (10+11+12)/C	220/2,144 = 10%	1,866/3,189 = 59%	2,086/5,333 = 39%
Response rate = D / B	1,924/7,074 = 27%	1,323/9,725 = 14%	3,247/16,799 = 19%

MORE INFORMATION

The LGCA is created by The Liquor, Gaming and Cannabis Control Act (the Act) and, with respect to its gaming accountabilities, as authorized by the Criminal Code (Canada). The Act and associated regulations establish and empower the LGCA to regulate liquor, gaming, cannabis and horse racing in Manitoba. In addition to public education, the LGCA's mandate includes independent and collaborative research related to the industries it regulates. Research results inform policy advisory activities, operational programs and services, and social responsibility initiatives.

For more information about this publication or about the Liquor, Gaming and Cannabis Authority of Manitoba (LGCA), visit our website, [LGCAMB.ca](https://www.lgca.mb.ca), or contact us at research@LGCAMB.ca or **204-927-5300**.

REFERENCES

Government of Canada (2019). *Canadian Alcohol and Drugs Survey (CADS): 2019 detailed tables*. Retrieved from: <https://www.canada.ca/en/health-canada/services/canadian-alcohol-drugs-survey/2019-summary/detailed-tables.html#t2>

Available in alternate formats, upon request.