Manitobans and Gambling III

September 2010



Vision

To regulate and control gaming activity in Manitoba by protecting the public interest, being

proactive and responsive to Manitoba's evolving gaming environment and working in

consultation with our clients, stakeholders and partners to establish fair, balanced and responsible

gaming practices.

Mission

To ensure that gaming activity is conducted honestly, with integrity and in the public interest.

We achieve this by strengthening our knowledge base, implementing best practices, building

strong communication channels, and using a balanced approach to deliver services and policy

advice to effectively and responsively regulate and control gaming activities in our province for

the benefit of all Manitobans.

For further information, or to obtain additional copies of this report, please contact:

Research and Communications Department Manitoba Gaming Control Commission 200-215 Garry Street Winnipeg, MB R3C 3P3

Tel: 204.954.9400, or toll free in Manitoba 1.800.782.0363 Fax: 204.954.9450, or toll free in Manitoba 1.866.999.6688

Email: research@mgcc.mb.ca

The Manitoba Gaming Control Commission's research agenda and reports are available at www.mgcc.mb.ca.



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Manitobans and Gambling Research Series

This study is the third survey in the Manitoba Gaming Control Commission's (MGCC) *Manitobans and Gambling* research series. As articulated in its research agenda, one of the MGCC's research goals is to ensure that a comprehensive and accurate picture of Manitoba's dynamic gaming environment is available to inform operational and responsible gambling initiatives. To achieve this goal, the MGCC conducts a public perception survey in the *Manitobans and Gambling* series every three years to measure Manitobans' gambling-related attitudes, awareness, knowledge and behaviours, including awareness of the MGCC's public education campaigns. Collecting similar data at different time points allows the MGCC to chronicle the changing impact of its responsible gambling initiatives and to monitor the evolution of Manitobans' gambling-related attitudes, awareness, knowledge and behaviours.

Comparing the findings of this study to those of the previous studies in this series (*Manitobans and Gambling II*, 2007; *Manitobans and Gambling*, 2004) and to the *Limit-Setting Campaign Evaluation Report* (2009) shows that gambling participation in Manitoba is quite stable. The majority of Manitobans (85.3%) participate in gambling activities, and the most popular forms of gambling have not changed since 2004. At this point, most Manitobans who gamble continue to choose traditional games; betting money online continues to be the least popular gambling activity in the province.

The results of this study suggest that the public has benefitted from the MGCC's public education campaign on gambling limits, which ran across the province in 2008 and 2009, and will run for a third time in fall 2010. In particular, the number of Manitobans who always set gambling limits has increased 16.5% since the MGCC began running this campaign. Though results from earlier years showed that the MGCC's earlier campaign on gambling myths also had an impact, the current results suggest that Manitobans may need to be reminded about gambling odds and randomness to retain this learning in the long term. Unlike earlier studies in this series, the findings do not suggest a clear new direction for the MGCC's public education messaging. Rather, as the results show that some Manitobans who recall the limit-setting campaign itself do not recall its messaging, the MGCC may consider refining its myth-busting and/or limit-setting messaging for increased clarity and reach, rather than developing entirely new messaging. The results further indicate that the MGCC should continue to direct future campaigns to Manitoban adults quite broadly, as there are no strong socio-demographic patterns to gambling knowledge and behaviours.

Though gambling behaviours are quite stable, the results of this research series show that gambling awareness, attitudes and knowledge have shifted as gambling has evolved in Manitoba. This highlights the need for the MGCC to continue to conduct research in the *Manitobans and Gambling* series, so that it can continue to take a science-based approach to ensuring that its responsible gambling initiatives respond to the changing needs of Manitobans.



Results and Discussion

This report is intended for the MGCC's broad stakeholders, including the regulatory community, government stakeholders and the general public of Manitoba. As such, it does not present test statistics and statistical significance levels, though readers with an interest in research are welcome to contact the MGCC for this detailed information. All relationships presented in this report are statistically significant, with p-values less than .01. Appendix A provides methodological information about this study.

Participation in Gambling Activities

The first section of the survey asked respondents how often they gamble on specific activities; results are presented in Table 1. The relative popularity of gambling activities and the average frequency of participation are virtually unchanged from last year's *Limit-Setting Campaign Evaluation Report* (2009). Buying charity raffle or fundraising tickets is the most popular form of gambling, with 61.8% of respondents reporting that they purchase these tickets at least once a year (52.1% in 2009). Buying lottery or instant win tickets and playing electronic gaming machines (i.e., slot machines and VLTs) are other popular gambling activities.

 Table 1
 Participation in specific gambling activities (Blue activity does not constitute gambling)

	Never	Less than once a year	1 - 11times per year	1 - 3 times per month	Once a week or more
Buying charity raffle or fundraising tickets, including charity lotteries and charity breakopens	29.9%	8.4%	51.9%	8.4%	1.5%
Buying lottery, instant win or scratch tickets at lottery kiosks or through subscriptions	36.1%	3.0%	24.1%	22.1%	14.7%
Playing gaming machines, like slot machines at a casino	59.2%	7.1%	25.1%	5.5%	3.1%
Playing VLTs at a bar, lounge or racetrack	71.5%	4.9%	14.9%	5.4%	3.3%
Playing poker for money at home with friends or family	77.3%	3.1%	13.5%	4.6%	1.5%
Playing sports lotteries like Sport Select or betting on sports pools	78.7%	4.6%	10.9%	2.6%	3.2%
Playing poker or casino games on free Internet sites without wagering any real money	85.0%	1.3%	5.2%	2.7%	5.8%
Playing bingo for money	86.1%	3.0%	6.0%	2.6%	2.3%
Bet money on card games, board games or games of skill such as pool, bowling or darts with friends and family	86.6%	2.2%	7.6%	2.2%	1.3%
Playing table games, such as blackjack and roulette, at a casino	87.9%	2.7%	7.1%	1.9%	0.4%
Betting on horse races, whether live at the track or off-track	88.2%	5.0%	6.4%	0.1%	0.3%
Playing poker for money in a bar, lounge or other public facility	93.2%	0.9%	3.5%	1.6%	0.9%
Betting money online	97.6%	0.1%	0.3%	0.8%	1.2%

Note: Total percentages across rows may not equal 100% due to rounding.



Online gambling remains the least popular reported form of gambling, with only 2.3% of respondents reporting that they bet money online at least once a year (2.0% in 2009; the increase is not statistically significant). For comparison, the MGCC began in this study to monitor the extent to which Manitobans play poker or casino games on free Internet sites without wagering real money, which does not constitute gambling. As Table 1 shows, 13.7% of Manitobans played on free sites at least once a year. It is not clear whether this interest will lead to an increase in online gambling over time; more than half (61%) of online gamblers report never having played on free sites in the past year.

Participation levels from all gambling activities were used to divide respondents into gambler and non-gambler categories. Those who reported never participating in any of the gambling activities listed in Table 1 (i.e., not including playing on free Internet sites), or participating in up to three activities all less than once a year, were classified as 'non-gamblers', with the rest classified as 'gamblers'. On this basis, 85.3% of Manitobans are gamblers. As Table 2 shows, this is statistically unchanged from 2009. Although it can be assumed that the number of gamblers in the province fluctuates over time, it is likely that the actual number of gamblers is more stable than Table 2 suggests, and that some of the flux before 2009 is due to slight differences in the way the information was collected.

 Table 2
 Number of gamblers reported over time

	2004	2006	2007	2009	2010
Manitobans classified as gamblers	94.0%	70.0%	69.2%	84.8%	85.3%

The results revealed a different demographic picture of gamblers than the one seen in earlier studies. That is, though there are demographic patterns for participation in particular games, overall gambling participation does not differ significantly by gender, age or region, or by household income, educational or workforce categories. This suggests that gambling has become a more generalized entertainment option, with all adult Manitobans equally likely to participate in some form of gambling activity. It is important to note that these results relate to gambling participation, not to problem or pathological gambling, and that the likelihood of developing a gambling problem might differ by demographic categories.

Certain games do exhibit demographic trends. Men are more likely than women to buy lottery or scratch tickets; to gamble on the Internet; and to play sports lotteries, table games, VLTs, and poker both publicly and at home. Young adults in the 18 to 24 year old age group are more likely to gamble on certain activities, including playing table games, VLTs, and poker both publicly and at home; betting money on cards or games other than poker; and betting money online. Young adults, in contrast, are less likely that older Manitobans to buy charity raffle or fundraising tickets or to buy lottery or scratch tickets. Participation in some games also differs by level of education. Manitobans who have completed post-secondary education are less likely to play slot machines or VLTs, or to buy lottery tickets, than those with less formal schooling. Manitobans who are currently students are more likely to report playing table games, playing poker, and betting on cards or other games with friends and family.



As in previous years, the particular demographics of bingo are very different from other gambling activities. Women report playing more bingo than men and northern Manitobans are more likely to play than people in other regions. Also, unlike some other gambling activities, bingo participation decreases with increasing education and income levels, and is played more by people who are students or out of the labour force than by people who are employed full- or part-time or retired.

Demographic patterns of playing on free Internet sites were examined, though this is not a gambling activity. People who play on free Internet sites are more likely to be male, 18 to 24 years old, daily Internet users, and either students or out of the labour force.

Belief and Knowledge about Gambling Myths

The first study in this research series, *Manitobans and Gambling* (2004), was the basis for the development of the MGCC's award-winning public education campaign on gambling-related odds and randomness¹, which ran across the province from 2005 to 2007. The MGCC has continued to track Manitobans' belief in gambling myths to measure the long-term impact of its campaign and to monitor changing public education needs.

To measure the number of Manitobans who believe common gambling myths, all respondents – both gamblers and non-gamblers – were read a series of statements about gambling and asked to indicate whether they agreed or disagreed with each statement. Although all statements are false, there are Manitobans who agree with each, as shown in Table 3 on the next page. Gambling fallacies are not unique to Manitobans; research literature confirms that myths about chance, randomness and outcome control are common. The results indicate that gamblers generally feel more certain than non-gamblers about their belief in gambling myths, whether correct or incorrect. That is, gamblers are less likely to answer that they 'don't know' and more likely to report that they 'strongly' agree or disagree.

Although socio-demographic patterns vary slightly for individual myths, analysis also reveals that, people with higher education and household income levels are generally less likely to agree with the gambling myths, but that belief in myths does not differ by gender. Age is more complicated. Though 18 to 24 year olds incorrectly agree more with myths about strategy (i.e., "It is important to understand exactly how a slot machine or VLT works in order to play better."; "Having a strategy or system when playing slot machines or VLTs increases the odds of winning."), they are no more likely than Manitobans in other age groups to agree with myths about staying at the same slot machine, or about themselves or machines becoming due for a win.

¹ Examples of the myth-busting campaign's print and radio advertisements are available at www.mgcc.mb.ca.



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Table 3 Adherence to gambling myths (Blue myths were addressed in the MGCC's public education campaign on myth-busting)

campaign on myth-busting)	Ct I	Q 1	G 1	C4 1-	"D '	T-4-1
	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree	"Don't know"	Total agree
If a machine has not paid out in a while, odds are it's due for a win.	40.9%	15.6%	25.8%	7.3%	10.5%	33.1%
It is important to understand exactly how a slot machine or VLT works in order to play better.	45.9%	15.5%	15.1%	14.6%	8.9%	29.7%
The odds of winning on a slot machine or VLT change as you are playing.	46.8%	14.6%	17.8%	9.7%	11.2%	27.5%
If you flip a coin and get heads 5 times in a row, your next flip is likely to be tails.	44.0%	18.6%	18.8%	8.4%	10.2%	27.2%
A series of numbers such as 12-5-23-7 is more likely to win than a series of numbers like 1-2-3-4.	45.6%	17.2%	15.6%	8.0%	13.6%	23.6%
Staying at the same slot machine or VLT will improve your chances of winning.	51.7%	19.1%	16.0%	3.5%	9.7%	19.5%
Having a strategy or system when playing slot machines or VLTs increases the chances of winning.	63.5%	12.3%	11.0%	3.7%	9.6%	14.7%
If you have been losing for a while, odds are you are due for a win.	63.7%	17.7%	9.5%	3.1%	6.0%	12.6%

Note: Total percentages across rows may not equal 100% due to rounding.

A scale was created with the eight erroneous statements that were included in the survey. As Table 4 shows, nearly a third of Manitobans (32.0%) believe zero myths and nearly another fifth believe just one. The number of people who know that all myths are false is lower than it was in 2007 (32.0% vs. 40.2% in 2007), suggesting that Manitobans may revert to old patterns of believing myths when myth-busting information is not top of mind. Manitobans believe an average of 1.9 myths², and gamblers believe more myths on average than non-gamblers (2.0 myths vs. 1.5 myths for non-gamblers). Belief in multiple gambling myths does not differ by socio-demographic categories.

Table 4 Adherence to multiple gambling myths

	0 myths	1 myth	2 myths	3 myths	4 myths	5 myths	6 myths	7 myths	8 myths
% of respondents adhering to myths	32.0%	19.7%	16.4%	12.4%	7.7%	5.7%	4.2%	1.2%	0.7%

Figure 1 on the next page compares the percentage of Manitobans who erroneously believe the gambling myths addressed in the MGCC's 2005 myth-busting campaign, with the percentages who believed these same myths in earlier studies. Though nearly all of the changes are statistically insignificant, the figure illustrates that the myths have increased slightly since the MGCC's myth busting campaign ended in 2007. Again, this suggests that Manitobans may revert to long-held myths when myth-busting information is not top of mind.

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 $^{^2}$ Median = 1.0 myth

Public Education Campaign Evaluation Report (2006) 100% Manitobans & Gambling II (2007) 80% Limit-Setting Campaign Evaluation Report (2009) Total Agree Manitobans & Gambling III (2010) 20% 35% 25% 25% 23% 19% 18% 16% 14% 9% The odds of If you have been It is important to Staying at the same Having a system understand exactly winning on a slot slot machine or losing for a while, when playing slot VLT will improve machines or VLTs how a slot machine machine or VLT odds are you are or VLT works in change as you your chances due for a win. increases the chances of winning. order to play better. are playing. of winning.

Figure 1 Comparison of belief in gambling myths from 2006 to 2010

Limit-Setting Strategies

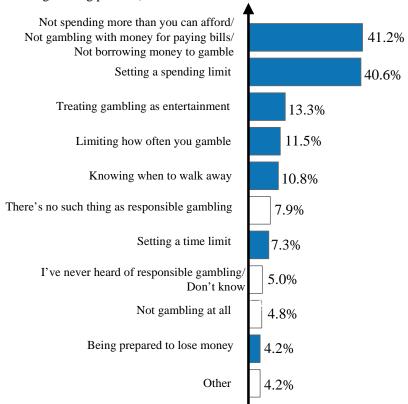
Manitobans and Gambling II (2007) found that more than one third of Manitobans never used strategies to limit their gambling. This finding, combined with other MGCC research, informed the development of the MGCC's public education campaign on limit-setting, which teaches Manitobans that gambling costs money, like other hobbies or forms of entertainment, and that gambling responsibly means playing within affordable limits³. As with gambling myths, the MGCC monitors the impact of its campaign by continuing to track Manitobans' understanding of responsible gambling and use of limit-setting strategies.

To explore Manitobans' understanding of gambling behaviours, respondents were asked what it means to them to gamble 'responsibly'. As Figure 2 on the next page illustrates, the majority of respondents correctly identified aspects of responsible gambling. Manitobans' perceptions of responsible gambling are consistent over time: the two most commonly mentioned aspects of responsible gambling (i.e., keeping gambling affordable and setting a spending limit) are the same as the top items identified in the *Limit-Setting Campaign Evaluation Report* (2009) and *Manitobans & Gambling II* (2007). Some Manitobans may be considering new responsible gambling strategies: 11.5% mentioned the strategy of limiting how often they gamble, which has not been mentioned in earlier surveys.

³ Examples of the limit-setting campaign's print and radio advertisements are available at www.mgcc.mb.ca.



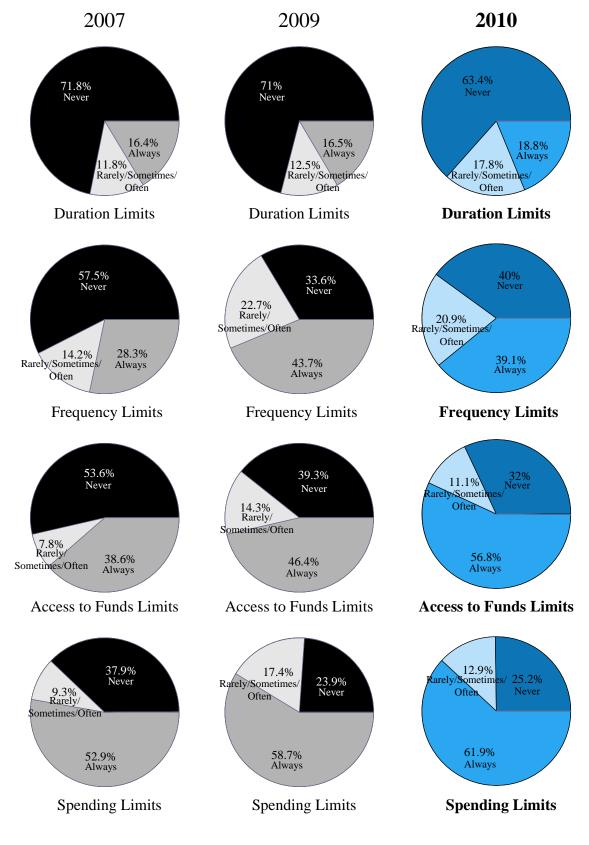
Figure 2 Definitions of responsible gambling (Blue items are widely recognized as being aspects of responsible gambling practice).



Note: Percentages exceed 100% due to multiple responses. The "Other" category includes responses such as "not letting gambling affect family or relationships", "taking breaks", "gambling only if it's for charity", "understanding the risk and dangers of gambling", "not gambling when anxious or stressed" and "it's up to the individual".

Gamblers were next asked about whether and how they limit their gambling. Respondents were asked about four different kinds of limits: duration limits (i.e., "Do you set a limit on how long you play?"), frequency limits (i.e., "Do you limit how often you gamble?"), spending limits (i.e., "Do you set a spending limit or budget where you decide in advance the maximum amount you'll spend gambling?"), and fund access limits (i.e., "Do you limit your available cash, for example, by leaving debit cards at home or by stopping play when you run out of cash?"). Figure 3 on the next page shows that setting a spending limit is the most common strategy used by Manitobans to gamble responsibly, as in past years, though fund access limits have become nearly as popular. The growth in the number of Manitobans who always limit their access to funds is the only statistically significant change since the *Limit-Setting Campaign Evaluation Report* (2009).

Figure 3 Use of four limit-setting strategies

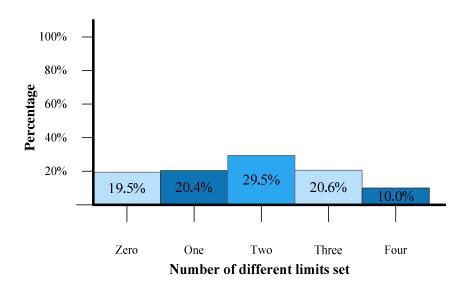


Like in last year's *Limit-Setting Campaign Evaluation Report* (2009), analysis reveals few socio-demographic patterns among people who limit their gambling. More women than men report that they always limit their access to funds and set frequency limits. People with higher levels of education are also more likely to always set frequency limits. Finally, 18 to 24 year olds and seniors (65+) are the least likely groups to always set spending and frequency limits.

Respondents who reported setting limits were asked additional questions about their average limits and how often they stick to these limits. Those who limit the duration of their gambling report a mean limit of 1 hour and 31 minutes of play⁴ and 62.6% report always sticking to their duration limits. Those who set frequency limits report an average limit of 2.2 gambling sessions per month⁵ and 77.8% report always sticking to their limits. Nearly the same amount (76.6%) report always sticking to their spending limits; the average spending limit is \$56.40 per gambling session⁶. These statistics are virtually unchanged from the *Limit-Setting Campaign Evaluation Report* (2009).

A scale was created with the four limit-setting strategies to examine whether Manitobans combine multiple strategies to gamble responsibly. Figure 4 shows that 19.5% of Manitobans do not use any limit-setting strategies; this has dropped 4.9% since 2009 and 16.5% since 2007, when 36% of Manitobans reported not using any strategies (*Limit-Setting Campaign Evaluation Report*, 2009; *Manitobans and Gambling III*, 2007). On average, Manitobans who gamble always use 1.8 limit-setting strategies⁷, and women use more limit-setting strategies than men to gamble responsibly.

Figure 4 Use of multiple limit-setting strategies





⁴ Median = 60 minutes

⁵ Median = six sessions per year

⁶ Median = \$20.00 per session

⁷ Median = 2.0 strategies

Gambling Motives

After the questions on limits, gamblers were asked how often they gamble for a series of specific reasons. Fifteen of these were taken from the Gambling Motives Questionnaire (Stewart & Zack, 2008). The additional nine questions were included because they represent potential financial reasons for gambling and, as such, build on the MGCC's interest in examining how monetary motives fit within the broader model of gambling motives. The MGCC began analyzing motives in a recent academic article (Dechant & Ellery, in press). It is the MGCC's hope that a more sophisticated understanding of the motives behind gambling will eventually allow it to tailor its educational messaging to people who gamble for different reasons.

Table 5 shows that, as in the *Limit-Setting Campaign Evaluation Report* (2009), gambling for fun and to win money are the most commonly endorsed motives for gambling, and that few Manitobans report gambling to cope with depression, anxiety or financial stress.

 Table 5
 Frequency of gambling motives (Blue items are from the Gambling Motives Questionnaire)

How often do you gamble	Never or almost never	Sometimes	Often	Always or almost always
because it's fun?	35.2%	33.4%	8.8%	22.6%
to win money?	47.4%	20.4%	4.9%	27.3%
to donate money to charities?	50.1%	37.5%	6.8%	5.5%
because you enjoy thinking about what you would do if you won a jackpot?	51.7%	31.0%	5.7%	11.6%
to be sociable?	53.3%	32.1%	6.1%	8.4%
because it's something you do on special occasions?	56.1%	33.5%	3.9%	6.5%
because it's exciting?	57.1%	30.1%	5.1%	7.8%
because it makes a social gathering more enjoyable?	62.7%	28.4%	4.0%	4.8%
because you like the feeling?	70.9%	18.8%	3.5%	6.8%
because it makes you feel good?	72.5%	20.2%	2.5%	4.8%
because winning would change your lifestyle?	72.8%	17.0%	2.9%	7.4%
because it's what most of your friends do when you get together?	75.0%	19.2%	2.3%	3.5%
to relax?	75.2%	17.4%	2.4%	4.9%
as a way to celebrate?	80.6%	17.2%	1.1%	1.2%
to feel like a winner?	82.9%	12.8%	1.2%	3.1%
to earn money?	85.3%	8.3%	1.0%	5.3%



Table 5 (continued)

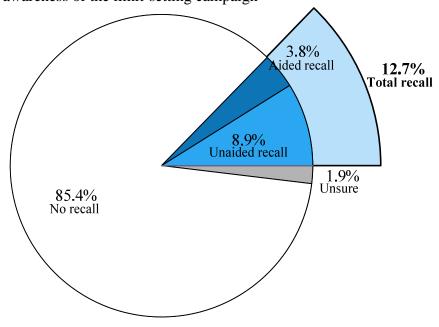
How often do you gamble	Never or almost never	Sometimes	Often	Always or almost always
to win back money you lost?	88.9%	8.8%	0.8%	1.5%
because you feel more self-confident or sure of yourself?	91.6%	5.9%	1.4%	1.2%
to cheer you up when you're in a bad mood?	91.8%	6.6%	1.0%	0.6%
to get a "high" feeling?	92.0%	5.0%	1.4%	1.5%
to forget your worries?	92.8%	5.6%	1.4%	0.3%
because it helps when you are feeling nervous or depressed?	95.0%	3.8%	0.8%	0.3%
because it's a good way to invest money?	97.0%	2.5%	0.1%	0.4%
as a way to get out of debt?	97.5%	1.4%	0.5%	0.7%

Note: Total percentages across rows may not equal 100% due to rounding.

Campaign Recall

The final section of the survey asked about respondents' awareness of the MGCC's limit-setting campaign. As Figure 5 illustrates, 12.7% of Manitobans recall having seen or heard the limit-setting messages, which is consistent with similar social marketing campaigns. Unaided recall (8.9%) is slightly higher than after the first campaign run, when 7.6% recalled the campaign without prompting (*Limit-Setting Campaign Evaluation Report*, 2009).

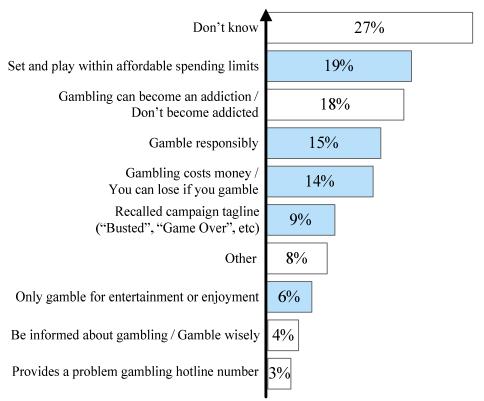
Figure 5 Overall awareness of the limit-setting campaign



Analysis showed that the MGCC was again successful in targeting young adults across the province. Recall was highest among 18 to 24 year olds: 28.4% of respondents in this age category remembered seeing or hearing the campaign. Recall was next highest among 25 to 34 year olds, at 19.0%, and then decreased in older age groups. Respondents with less than a high school education were much less likely to recall the campaign than those with more years of education. Recall does not differ by gender, region or household income. Also, gamblers were no more likely than non-gamblers to recall the campaign.

Respondents who recalled the campaign were asked to describe its main message in their own words. As Figure 5 illustrates, nearly a third (27%) of Manitobans who said they recalled the campaign said that they did not know its message. Respondents who recalled the campaign were also asked if they could remember who sponsored the messaging. Though just 8.5% correctly named the MGCC, this is double the number (4.0%) who could correctly identify the MGCC after the campaign's first run (*Limit-Setting Campaign Evaluation Report*, 2009). Like last year, most respondents either could not answer this question at all (38.6%) or believed that the campaign was sponsored by Manitoba Lotteries Corporation (35.2%). This indicates that some respondents confuse the MGCC's campaign with other gambling messaging, which is also evident because more than half of respondents recalled seeing or hearing the MGCC campaign in media in which it did not appear. As Table 6 on the next page shows, transit and radio advertising were the most commonly recalled media types in which the campaign actually appeared. The success of the MGCC's first two campaigns suggests that the MGCC should use similar media in the future.

Figure 6 Recall of campaign messaging (Highlighted items were actually main campaign messages)



Note: Percentages exceed 100% due to multiple responses.



 Table 6
 Recall of campaign media sources (The campaign did actually appear in the blue media)

	Percentage
Television	54.9%
Transit bus or bus shelter/stop	28.1%
Radio	17.0%
Billboards or signs	16.3%
Don't know	7.8%
Posters at VLT sites or casinos	7.2%
Other	5.9%
Newspapers	3.3%
Internet	2.6%
Pamphlet	2.6%

Note: Percentages exceed 100% due to multiple responses.

Public Awareness of the Manitoba Gaming Control Commission

The MGCC regularly includes tracking questions in its research surveys to monitor public awareness of the organization. This study included four public awareness questions that asked respondents to identify the MGCC and to describe its activities, to the best of their knowledge.

Although 69.1% of respondents say that they have heard of the MGCC, only 8.0% are able to correctly name the MGCC as the organization that regulates gambling in Manitoba. This is slightly higher than in 2009, when just 5.0% identified the MGCC without prompting, though this statistic has not changed significantly since the MGCC began tracking public awareness in 2006. Much like earlier years, 27.0% of Manitobans could not venture a guess, and most others (56.7%) incorrectly named Manitoba Lotteries Corporation. Other incorrect answers included the provincial government (3.8%) and Western Canada Lottery Corporation (2.8%). The results showed that gamblers are more likely to have heard of the MGCC (70.9% vs. 55.8% of nongamblers), and that 18 to 24 year olds are less likely to have heard of the organization than older age groups. In a separate question, 3.1% of respondents reported having visited the MGCC's website at www.mgcc.mb.ca.

When respondents were asked to describe the MGCC's responsibilities, over half (55.1%) of the 1,361 responses (multiple responses were permitted) correctly identified aspects of the MGCC's role, as shown in Table 7 on the next page. This indicates that many Manitobans understand that there is a gaming regulator in the province, even if its name is not top of mind. Like in earlier studies, 'I don't know' continues to be a response to this question, suggesting that some Manitobans are unaware of the gaming regulatory function.



 Table 7
 Awareness of the MGCC's responsibilities (Blue items are true responsibilities)

Response	%
Regulates gambling in Manitoba	33.8%
Don't know	14.1%
Runs casinos and/or VLTs and/or sells lottery tickets	12.0%
Ensures integrity/fairness/honesty of gambling	8.5%
Licenses charitable gaming activities in Manitoba	8.4%
Helps problem gamblers / has a helpline	6.7%
Makes policies or decisions about gambling	6.2%
Collects money/profit	5.6%
Sets payoffs / controls winnings	5.3%
Educates Manitobans about responsible gambling	3.2%
Provides information about gambling	2.5%
Redistributes governmental profits from gambling	2.2%
Promotes gambling	2.0%
Other	1.5%
Taxes people / rips people off / breaks up families	1.2%

Note: Percentages exceed 100% due to multiple responses.

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Acknowledgements

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Appendix A: Methodology

Following a rigorous tendering process, the MGCC contracted Prairie Research Associates (PRA) to conduct a 15-minute telephone survey with a representative sample of adult Manitobans. The MGCC developed the draft 68-item questionnaire, which repeated many questions from previous MGCC studies (*Limit-Setting Campaign Evaluation Report*, 2009; *Manitobans and Gambling II*, 2007; *Manitobans and Gambling*, 2004) to allow for comparisons over time. Following a pre-test with 23 Manitobans, PRA made minor modifications in consultation with the MGCC to improve the flow of the survey and participants' understanding of the questions. Appendix B presents the final survey instrument.

PRA was responsible for developing the sample frame for the study. PRA used a stratified sampling technique to ensure an adequate sample was obtained in four regions in Manitoba – Winnipeg, Brandon, southern Manitoba and northern Manitoba. PRA conducted the telephone survey over three-and-a-half weeks in April 2010 from their Winnipeg call centre, making multiple calls to non-responders and varying the day of the week and time of day that telephone numbers were attempted.

Using the Marketing Research and Intelligence Association's response rate calculation, the survey achieved a 35.9% response rate. Tables 8 and 9 on the next page present the detailed call record and the theoretical error rates by region. The theoretical error rate for the province is +/- 3.1%, slightly higher than it would have been if a stratified sample had not been used.

When the random sample diverged from population data, weights derived from the 2006 Canadian Census were applied to correct for slight discrepancies in gender, age and household income. Table 10 on page 18 presents the demographic profile of the sample, comparing unweighted and weighted sample data with population data. All results presented in this report were calculated using weighted data. SPSS version 15.0 was used for quantitative data analysis, including statistical testing to analyze any differences in respondent subpopulations. The majority of variables in the dataset are nominal and ordinal, thus nonparametric statistics were used. The MGCC acknowledges that inferences drawn to a population from a sample must be considered in the context of the power of the statistical tests used. Readers should be mindful when inferring the findings to the general population that it was necessary to use ordinal and nominal-level statistical tests in this analysis. All relationships presented in this report were significant, with p-values less than .01. Though the report is intended for general audiences, and so does not present test statistics and statistical significance levels, readers are welcome to contact the MGCC for this detailed information.



Table 8 Call record

Outcome	n
Total numbers attempted	12,551
Not in service	3,118
Fax	213
Business	202
Total eligible numbers (E)	9,018
Unresolved (U)	1,951
Answering machines	1,027
No answer	532
Language barrier/illness	348
Busy	44
Non-responding (NR)	3,832
Respondent refusal	2,141
Qualified respondent break-off	623
Household refusal	583
Selected respondent not available	485
Cooperative contacts (C)	3,235
Disqualified	2,033
Completed interviews (N)	1,202
Refusal rate (C/C+NR)	45.8%
Response rate (C/E)	35.9%
Completion rate (N/E)	13.3%

Theoretical error rates by region Table 9

Region	Adult population ¹	Adult population ¹ Completed surveys	
Manitoba	871,475	1,202	+/- 3.1%
Winnipeg	542,080	600	+/- 4.0%
Rural Manitoba	329,395	602	+/- 4.0%
Brandon	38,080	150	+/- 8.0%
Southern Manitoba ²	223,036	300	+/- 5.7%
Northern Manitoba ²	68,279	152	+/- 8.0%



¹Based on Statistics Canada, Canadian Census, 2006.
²The category 'southern Manitoba' includes census subdivisions 1 to 10 and 12 to 20 (excluding Brandon). The category 'northern Manitoba' includes census subdivisions 21 to 23.

 Table 10
 Demographic profile

Demographic variables	2006 adult population	2010 unweighted sample	2010 weighted sample ⁴
Region ¹	population	sample	sample
Winnipeg	62.2%	49.9%	49.8%
Outside Winnipeg	37.8%	50.1%	50.2%
Brandon	4.4%	12.5%	12.9%
Southern Manitoba	25.6%	25.0%	24.0%
Northern Manitoba	7.8%	12.6%	13.3%
Gender ¹			
Female	51.6%	57.3%	52.7%
Male	48.4%	42.7%	47.3%
Age (years)			
18 to 24	12.6%	6.2%	12.3%
25 to 34	16.2%	12.0%	16.2%
35 to 44	18.6%	15.9%	18.1%
45 to 54	19.7%	23.1%	20.0%
55 to 64	14.4%	19.6%	14.4%
65 to 74	9.1%	14.7%	9.2%
75 and older	9.5%	8.1%	9.5%
No response	-	0.3%	0.4%
Education ²		·	
Less than high school	29.5%	13.2%	13.4%
Completed high school	26.7%	25.1%	24.8%
Some post-secondary	-	11.6%	12.1%
Completed post-secondary	43.9%	49.3%	48.7%
No response	=	0.8%	1.0%
Household income (\$)			
Under 20,000	7.8%	6.6%	6.7%
20,000 to 29,999	9.0%	7.4%	7.5%
30,000 to 49,999	22.1%	17.0%	17.2%
50,000 to 79,999	28.3%	20.4%	22.3%
80,000 to 100,000	12.8%	10.6%	10.3%
100,000 and over	20.0%	18.1%	17.1%
No response	-	20.0%	19.0%
Employment status ³			
Employed full-time	63.6%	48.9%	51.1%
Employed part-time		10.1%	10.7%
Unemployed/out of labour force	3.7%	7.9%	8.2%
Retired	32.7%	2.2%	4.2%
Student	52.1 /0	28.5%	23.4%
No response		2.2%	2.5%

Source: This study and Statistics Canada, Canadian Census 2006.

⁴ Survey data is simultaneously weighted by region, age, gender and income. Small discrepancies between the population and the sample data for these variables results from rounding and merging categories, which are necessary to protect the anonymity of census and survey respondents.



¹Gender and region census information is based only on those 18 years of age and older.

² Education census information is based on those 15 years of age and older, and does not include a category for 'some post-secondary education'. The category 'completed post-secondary' includes census categories for apprenticeship or trades certificate or diploma; college, CEGEP or other non-university certificate or diploma; university certificate or diploma below the bachelor level; and university certificate, diploma or degree.

³ Employment status census information is based on those 15 years of age and older. Census information does not break down employment into full- and part-time workers. The censuses' category for those out of the labour force includes students, homemakers, retired workers, seasonal workers in an off-season who were not looking for work, and persons who could not work because of a long-term illness or disability.

Appendix B: Survey Instrument

Manitobans and Gambling III

Survey Questionnaire

REGION	☐ Winnipeg		Brandon	□МІ	B South	□МВ	North			
GENDER	☐ Male		Female							
Hello, my name	e is a	and I'm callin	g from Prair	ie Research	Associates, a	a public opin	ion research	company.		
	lling adult Manitoba hether or not you ga							ans think abo	out gambling	.,
Before we begin	n, I would like to as	sure you that	all the infor	nation gathe	red through	this study is	completely of	confidential.	We guarante	ee your
	No	w				0				
	NT ASKS HOW Lome or choose not to				he survey w	ill take less t	han 20 minu	tes of your ti	me. You car	stop the
	NT ASKS TO CON									
IF RESPONDE	NT ASKS WHO T	HE CLIENT	IS: I can't te	ll you right r	now, but I ca	n let you kno	ow at the end	l of the surve	y.	
		P	ARTICIPA'	TION IN GA	AMBLING.	ACTIVITIE	ES			
times per week, than once a yea	ask some questions about once a week r, or never. How oft	, about 2 or 3 en do you	times a mon	th, about on						
	Less	1	•		2 2	4.1	24.6			
N	lever than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
	01 02	03	04	05	06	07	08	09	88	99
	other lottery, instartides 6/49, Super 7,								AMPLES: Th	nis
N	Jever Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
	01 02	03	04	05	06	07	08	09	88	99
Q3 Buy	charity raffle or fur	draising tick	ets includin	a charity lott	eries charits	, breakonens	and charity	Nevada tick	ote?	
	Less than once a	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
	9 ear 01 02	03	04	05	06	07	08	09	88	99
	01 02	- 05				<u> </u>			- 66	
Q4 Play	bingo for money?	1	ı	T	ı	ı	T	T		
N	Jever Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
	01 02	03	04	05	06	07	08	09	88	99



Q5 Play electronic games, like slot machines, at a casino?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q6 Play table games, such as blackjack and roulette, at a casino? IF ASKED FOR EXAMPLES: Table games include Baccarat and all

kinds of poker, like Texas Hold'em and Pai Gow.

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q7 Play VLTs at a bar, lounge or racetrack?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q8 Bet on horse races, whether live at the track or off-track?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q9 Play poker for money in a bar, lounge or other public facility?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q10 Play poker **for money** at home with friends or family?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q11 Bet money on cards or games with family and friends, not including poker, or on games of skill such as pool, bowling or darts?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q12 Bet money on the Internet? IF ASKED FOR EXAMPLES: This includes playing casino games, like poker or blackjack for money, or placing online bets on sports.

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Q13 And last, how often do you play poker or casino games on free Internet sites and don't wager any real money?

Never	Less than once a year	1 to 5 times a year	6 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99



Q14 Next, I'd like to ask you some questions about gambling behaviours in general.

What do you think it means to gamble "responsibly"? PROBE Anything else? SELECT ALL THAT APPLY. DO NOT READ RESPONSE OPTIONS.

Setting a time limit	01
Setting a spending limit	
Not spending more than you can afford / not	
gambling with money for paying bills	03
Not borrowing money to gamble	04
Not gambling at all	05
Treating gambling as entertainment /	
not taking gambling too seriously	06
Knowing when to walk away	07
Being prepared to lose money	08
Taking breaks when gambling	09
Not gambling when stressed, anxious or depressed	10
There's no such thing as responsible gambling	11
I've never heard of responsible gambling	12
Other	
Don't know_	88
Refuse	99

LIMIT-SETTING STRATEGIES

IF NON-GAMBLER, SKIP TO Q42.

Next, I'm going to read you a list of strategies. Please tell whether or not you ever use the strategies to manage your own gambling. IF YES: How often do you do this? Would you say rarely, sometimes, often or always. ROTATE Q15 THROUGH Q18.

Q15	SKIP IF Q1 & Q4-12 ARE ALL NEVER/DK/NR	No/ Never	Rarel y	Some- times	Often	Alw	t	Don't know	Refus e
	a) Do you set a limit on how long you play? IF YES: And would you say you rarely, sometimes, often, or always limit how long you play?	01 SKIP TO Q16	02	03	04	05	06	08	09
	b) When you set a time limit, what's the average limit you set?		hou	irs or	min	nutes	06	08	09
	c) When you set a time limit, how often you do stick to your limit? Would you say never, rarely, sometimes, often or do you always stick to your limit?	01	02	03	04	05	06	08	09
Q16		No/ Never	Rarel	Som time	• ()	ften	Always	Don't know	Refuse
	a) Do you limit how often you gamble? IF YES: And would you say you rarely, sometimes, often or always limit how often you gamble?	01 SKIP TO Q17	02	03	;	04	05	08	09
	b)What's the average limit you set when you limit how often you gamble?		times month o	per week	or _ times p		nes per	08	09
	c) When you limit how often you gamble, how often do you stick to your limit? Would you say never, rarely, sometimes, often or do you always stick to your limit?	01	02	03	,	04	05	08	09
Q17	SKIP IF Q1 & Q4-12 ARE ALL NEVER/DK/NR	No/ Never	Rarel y	Some- times	Often	Alw ys	t t	Don't know	Refus e
	a) Do you limit your available cash, for example, by leaving debit and credit cards at home or by stopping playing when you run out of cash? IF YES: And would you say you rarely, sometimes, often or always limit your available cash?	01	02	03	04	05		08	09

Q18	No/ Never	Rarely	Some- times	Often	Always	Don't know	Refuse
a) Do you set a spending limit or budget where you decide in advance the maximum amount you'll spend gambling? IF YES: And would you say you rarely, sometimes, often or always set a spending limit or budget?	01 SKIP TO Q19	02	03	04	05	08	09
b) What's your average spending limit when you use this strategy?	\$				08	09	
c) When you set a spending limit or budget, how often do you stick to your limit? Would you say never, rarely, sometimes, often or do you always stick to your limit?	01	02	03	04	05	08	09

GAMBLING MOTIVES

Next I am going to read a list of reasons that other people sometimes give for gambling and Γ d like to know if any of these are reasons that apply to you. Remember that there are no right or wrong answers; we just want to know about the reasons why you usually gamble. Thinking now of all the times you've gambled, how often do you gamble... RANDOMIZE Q19 TO Q41.

		Never or Almost Never	Sometimes	Often	Almost Always or Always	Don't know	Refus e
Q19	as a way to celebrate?						
Q20	to relax?	01	02	03	04	08	09
Q21	because you like the feeling?	01	02	03	04	08	09
Q22	because it's what most of your friends do when you get together?	01	02	03	04	08	09
Q23	to forget your worries?	01	02	03	04	08	09
Q24	because it's exciting?	01	02	03	04	08	09
Q25	to be sociable?	01	02	03	04	08	09
Q26	because you feel more self-confident or sure of yourself?	01	02	03	04	08	09
Q27	to get a 'high' feeling?	01	02	03	04	08	09
Q28	it's something you do on special occasions?	01	02	03	04	08	09
Q29	because it helps when you are feeling nervous or depressed?	01	02	03	04	08	09
Q30	because it's fun?	01	02	03	04	08	09
Q31	because it makes a social gathering more enjoyable?	01	02	03	04	08	09
Q32	to cheer up when you're in a bad mood?	01	02	03	04	08	09
Q33	because it makes you feel good?	01	02	03	04	08	09
Q34	to win money?	01	02	03	04	08	09
Q35	to donate money to charities?	01	02	03	04	08	09
Q36	to earn money?	01	02	03	04	08	09
Q37	because you enjoy thinking about what you would do if you won a jackpot?	01	02	03	04	08	09
Q38	to feel like a winner?	01	02	03	04	08	09
Q39	because winning would change your lifestyle?	01	02	03	04	08	09
Q40	because it's a good way to invest money?	01	02	03	04	08	09
Q41	as a way to get out of debt?	01	02	03	04	08	09
Q42	to win back money you lost?	01	02	03	04	08	09



GAMBLING MYTHS

I am now going to read a series of statements that people sometimes make about gambling and I would like to know whether you agree or disagree with each one. Keep in mind that there are no right or wrong answers. WHEN RESPONDENT SAYS "AGREE" OR "DISAGREE": And would you say strongly [agree/disagree] or somewhat [agree/disagree]? DO NOT OFFER "NEITHER AGREE NOR DISAGREE" AS A CATEGORY. RANDOMIZE Q42 THROUGH Q49.

		Strongly disagree	Some- what disagree	Some- what agree	Strongly agree	Neither agree nor disagree	Don't know	Refuse
Q43	The odds of winning on a slot machine or VLT change as you are playing.	01	02	03	04	05	08	09
Q44	It is important to understand exactly how a slot machine or VLT works in order to play better.	01	02	03	04	05	08	09
Q45	Having a strategy or system when playing slot machines or VLTs increases the chances of winning.	01	02	03	04	05	08	09
Q46	Staying at the same slot machine or VLT will improve your chances of winning.	01	02	03	04	05	08	09
Q47	If a <i>machine</i> hasn't paid out in awhile, odds are it's due for a win.	01	02	03	04	05	08	09
Q48	If you have been losing for awhile, odds are you are due for a win.	01	02	03	04	05	08	09
Q49	If you flip a coin and get heads 5 times in a row, your next flip is likely to be tails.	01	02	03	04	05	08	09
Q50	A series of numbers, such as 12-5-23-7 is more likely to win than a series of numbers like 1-2-3-4.	01	02	03	04	05	08	09

CAMPAIGN RECALL

The next series of questions is about your perceptions of gambling in Manitoba.

Q51	Do you recall ever seeing or hearing any public message	ges or advertising about gambling in Manitoba?
	Yes	01
		02 SKIP TO Q52
	Don't know	08 SKIP TO Q52
	Refuse	09 SKIP TO Q52
Q52	What was the main message of these ads, or what you	remember from the ads? PROBE: Anything else? Anything else?
Q53		ges or advertisements about gambling that used words like "Busted!" "Game
	Over!" "Dab Nag It!" or "Oh Craps!"?	0.1
	Yes	01
	No	02 SKIP TO Q56
	Don't know	08 SKIP TO Q56
	Refuse	09 SKIP TO Q56
Q54	What was the main message of these ads, or what you	remember from the ads? PROBE: Anything else? Anything else?



Q55	Where do you recall seeing or hearing these ads? PROBE: Anywhere else? S	ELECT ALL THAT APPLY. PROBE: If respondent says
	"Internet", ask "Do you remember the website?"	0.1
	Radio	
	Newspaper	
	Transit shelter or bus	
	Casino	
	VLT site/bar/lounge/restaurant	
	Bingo	
	Billboard	07
	Pamphlet or brochure	
	Television	
	Facebook	
	Internet (Other)	
	Other	
	Don't know	
	Refuse	⁹⁹
Q56	Do you remember who sponsored the ads or messages?	
	Manitoba Gaming Control Commission	
	Manitoba Lotteries Corporation	
	Addictions Foundation of Manitoba	
	Federal Government	
	Provincial Government	05
	Western Canada Lottery Corporation	
	Casinos	
	Other	
	Don't know_	
	Refuse	99
Q57	As far as you know, what is the name of the organization that regulates gamb	oling in Manitoba?
•	Manitoba Gaming Control Commission	
	Manitoba Lotteries Corporation	
	Addictions Foundation of Manitoba	03
	Federal Government	04
	Provincial Government_	
	Western Canada Lottery Corporation	
	Casinos	07
	Other	
	Don't know_	
	Refuse	
Q58	Have you heard of the Manitoba Gaming Control Commission?	
QJO	Yes	01
	No.	02 SKIP TO O61
	Don't know	
	Refuse	
050	Have you ever visited the Manitoba Gaming Control Commission's website?	
Q59	Yes Yes	
	No.	
	Don't know	
	Refuse	
	TOTALO	



Q60	To the best of your knowledge, what does the Manitoba Gaming Control Commission do? PROBE: Anything else? SELECT ALI
	THAT APPLY. DO NOT READ RESPONSE OPTIONS.

Regulates gambling in Manitoba	01
Ensures integrity/fairness/honesty of gambling	02
Collects money/profit	03
Runs casinos and/or VLTs/sells lottery tickets	04
Helps problem gamblers/has a hotline	05
Licenses gaming activities in Manitoba (charitable)	
Makes policies/decisions about gambling	07
Taxes people/rips people off/breaks up families	
Sets payoffs/controls winnings	09
Redistributes governmental profits from gambling	
Promotes gambling	11
Educates Manitobans about responsible gambling	12
Provides information about gambling	13
Does research on gambling	14
Other	15
Nothing	
Don't know	88
Refuse	99

DEMOGRAPHICS

To close, I would like to ask you a few quick questions strictly for classification purposes. On a scale from one to five, where one means you strongly disagree and five means you strongly agree, please tell me how much you agree with the following statements.

		1 (strongly disagree)	2	3	4	5 (strongly agree)	Don't know	Refuse
Q61	I would like to explore strange places.	01	02	03	04	05	08	09
Q62	I like to do frightening things.	01	02	03	04	05	08	09
Q63	I like new and exciting experiences, even if I have to break the rules.	01	02	03	04	05	08	09
Q64	I prefer friends who are exciting and unpredictable.	01	02	03	04	05	08	09

Q65 On average, how often do you use the Internet?

Never	Less than once a year	1 to 11 times a year	About once a month	2 or 3 times a month	About once a week	2 or 3 times a week	4 to 6 times a week	Daily	Don't know	Refuse
01	02	03	04	05	06	07	08	09	88	99

Λ1

Q66 What is the highest level of schooling you have completed?

Less than high school	-01
Completed high school	_02
Some post-secondary	03
Completed post-secondary	_04
Don't know	_08
Refuse	_09

Q67 Which of the following best describes your current employment status? READ LIST Employed full-time

Employed full-time	01
	f labour force 03
Student	04
Retired	05
Don't know	08
Refuse	09

Q68 Which of the following categories best describes your age? READ LIST

18-24 years old	01
25-34 years old	02
35-44 years old	03
45-54 years old	
	05
65-74 years old	06
75 years and older	07
Don't know	
Refuse	09



Q69 For statistical purposes only, we need information about your income. I'm going to read a list of categories; please stop me when I get to the one that applies to your total household income before taxes. READ LIST

Less than \$10,000	01
\$10,000 to \$20,000	02
\$20,000 to \$30,000	
\$30,000 to \$40,000	04
\$40,000 to \$50,000	05
\$50,000 to \$60,000	
\$60,000 to \$70,000	
\$70,000 to \$80,000	
\$80,000 to \$90,000	
\$90,000 to \$100,000	
More than \$100,000	
Don't know	
Refuse	99

Thank you for helping us with this survey. Your responses are very important and we appreciate the time it has taken you to answer these questions.

