

Liquor and Gambling in Manitoba II

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Liquor and Gaming
Authority of Manitoba

www.LGManitoba.ca

EXECUTIVE SUMMARY

In June 2016, the Liquor and Gaming Authority of Manitoba (LGA) conducted a survey of 1,200 adult Manitobans to gather information about their liquor- and gambling-related knowledge and activities. The LGA conducts provincial prevalence surveys every three years to monitor changes in population behaviours, and is pleased to note that this series of surveys has become a key source for statistics on liquor and gambling in Manitoba.

The results show that the majority of Manitobans both drink liquor and gamble, and that they do so responsibly. Three quarters of Manitobans reported drinking in the past year, motivated primarily by social reasons. Manitobans are aware of strategies to reduce risks related to liquor consumption, with 86% always using at least one responsible drinking strategy to protect themselves. Pre-planning transportation, for example by calling a taxi or having a designated driver when drinking, remains the most popular strategy.

In 2014, Manitoba's liquor control framework was completely overhauled for the first time since 1956, with a focus on 21st century expectations for consumer choice, social responsibility, public safety and red tape reduction as the cornerstones of modern regulation. At the time, changes such as eliminating advertising prohibitions, eliminating dining room food to liquor ratios, and introducing family-friendly options for beverage rooms prompted some concern that these loosened regulations would increase problematic liquor consumption. Overall, the current results show that liquor consumption and responsible behaviours have remained stable since these were benchmarked in 2013, prior to the introduction of the more flexible regulatory regime. This highlights the need to continue to conduct population surveys as a way to monitor the impact of regulatory changes.

Information about the impact of age on responsible drinking from the 2013 *Liquor and Gambling in Manitoba* survey allowed the LGA to develop its province-wide "Know My Limits" campaign to teach young adult Manitobans about the national low-risk drinking guidelines. Despite the high use of responsible drinking strategies, the current results show that many Manitobans continue to exceed these national guidelines on a regular basis. Also, nearly 20% of Manitobans are at increased risk for experiencing alcohol-related harm. While these findings are comparable to results from other jurisdictions, they indicate that the LGA's public education initiatives to promote low-risk drinking continue to be necessary.

Switching the focus to gambling behaviours, nearly three quarters of Manitobans reported gambling in the past year. This represents a slight decline since 2013, and a continuation of the downward trend noted since 2010, when 85% of Manitobans were classified as gamblers. The most popular forms of gambling are stable, with their relative popularity unchanged since 2004

and betting money online continuing to be the least popular gambling activity (1.5%). The LGA measured daily fantasy sports¹ participation for the first time in 2016, and the rate (2.0%) is comparable to the low level of online gambling activity.

The results show that Manitobans gamble mainly for entertainment or fun, and that the majority of Manitobans' gambling behaviour indicates that they are not at risk of experiencing harm. The rates of problem gambling (0.2%) are lower than the last available measures from 2013 (0.8%), as are the rates of people at moderate risk of experiencing gambling-related harm (0.3%, compared to 1.2% in 2013). While most Manitobans set gambling limits; the proportions that set at least one responsible gambling limit decreased, from 74% in 2013 to 68% in 2016. Further analysis revealed that men and older adults would stand to benefit most from targeted responsible gambling public education initiatives.

Manitobans recognize that liquor and gambling are consumer products that carry risk and require special oversight, and they expect the LGA to regulate these in the public interest. The LGA strives to be neutral and balanced in its regulatory role, and uses empirical evidence to guide its operational and social responsibility initiatives. This survey's comprehensive results about the province's liquor consumption and gambling patterns will be used to inform the LGA's regulatory activities, including the development of gambling-related public education materials and the continued development of the curriculum for the LGA's Smart Choices responsible service certification. The survey will be repeated next in 2019, as collecting similar data at different time points allows the LGA to chronicle the changing impact of its social responsibility initiatives and to monitor the evolution of Manitobans' liquor- and gambling-related knowledge and behaviours.

¹ Daily fantasy sports refers to playing for money on websites such as DraftKings or FanDuel. Players pay to build a hypothetical team of professional athletes from a particular league or competition, and then earn points based on the athletes' actual performance in real-world games. Daily fantasy sports are played over shorter time periods than traditional fantasy sports, such as a week or a single competition.

RESULTS

This report is intended for the LGA’s broad stakeholders, including government policymakers, liquor and gambling regulators and operators, and the Manitoba public. As such, it does not present test statistics or statistical significance levels, although readers with an interest in research are welcome to contact the LGA for these details. Data are weighted to account for any deviations from Statistics Canada population characteristics. All relationships presented in this report are statistically significant, with p-values less than .05. Appendix A provides methodological information about the study.

LIQUOR

WHO DRINKS IN MANITOBA?

The survey began by asking participants how often they drank alcoholic beverages in the past 12 months. The LGA defined a standard drink for survey participants as either:

- one regular bottle or can of beer or one glass of draft beer;
- one glass of wine or one wine cooler; or
- one straight or mixed drink with 1.5 ounces of liquor.

Using this definition, 75.3% of Manitobans reported drinking alcoholic beverages in the past 12 months. Past-year liquor consumption was slightly higher (79.3%) in 2013, although this may be due to differences in who answered the survey. The results are similar to the most recent *Canadian Tobacco, Alcohol and Drug Use Monitoring Survey*, which classified 75.2% of Manitobans as past-year drinkers, consistent in comparison to other provinces (Health Canada 2016). Most participants reported moderate liquor consumption: three quarters drank once a week or less, and over 90% drank two to three times a week or less, as shown in Table 1. Beer and wine were the most commonly consumed beverages. In the past year, of those who drank:

- 50.7% drank beer
- 44.9% drank wine
- 31.8% drank straight liquor
- 21.3% drank mixed drinks or cocktails
- 11.0% drank coolers
- 5.4% drank other alcoholic beverages such as cider

Table 1 Drinking frequency (How often did you drink alcoholic beverages during the past 12 months?)

| | Never | Less than once a month | Once a month | 2-3 times a month | Once a week | 2-3 times a week | 4-6 times a week | Every day |
|---------------------------------|-------|------------------------|--------------|-------------------|-------------|------------------|------------------|-----------|
| Past-year drinking rates | 24.7% | 16.8% | 8.8% | 13.1% | 11.1% | 16.5% | 5.2% | 3.8% |

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

Although most differences are small, some demographic groups reported more frequent drinking. In particular, males reported a higher drinking frequency than females. These

differences, illustrated in Table 2, indicate that 72.4% of females drank liquor in the past year, compared to 78.4% of males.

Table 2 Drinking frequency by sex

| | Never | Less than once a month | Once a month | 2-3 times a month | Once a week | 2-3 times a week | 4-6 times a week | Every day |
|----------------|-------|------------------------|--------------|-------------------|-------------|------------------|------------------|-----------|
| Males | 21.6% | 10.5% | 9.0% | 11.9% | 14.6% | 20.4% | 7.0% | 5.1% |
| Females | 27.6% | 22.9% | 8.7% | 14.2% | 7.8% | 12.7% | 3.4% | 2.6% |

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

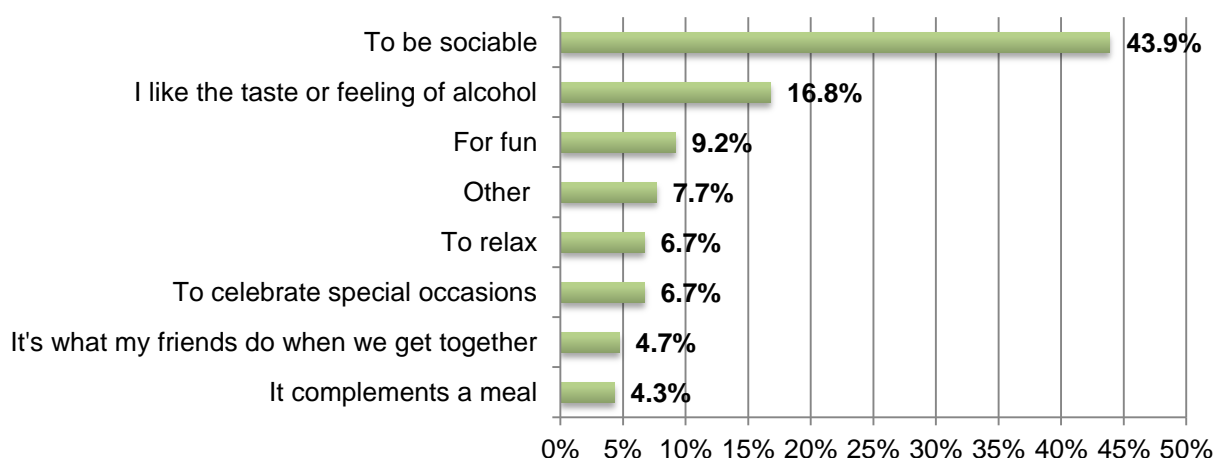
Drinking behaviour also differed by employment status. Employed participants (both full- and part-time), retirees and students all reported higher rates of drinking than participants who were unemployed or otherwise out of the labour force. Financial resources and liquor consumption have a direct relationship; that is, people with higher household incomes reported more drinking than those with lower incomes.

Current results did not replicate the regional differences in drinking behaviours observed in 2013. The survey also did not find an association between age and general liquor consumption, despite the impact of age as an important predictor of drinking behaviours (Kuntsche, Knibbe, Gmel & Engels 2005; Norman, Bennet & Lewis 1998).

WHY DO MANITOBANS DRINK?

Knowing the reasons why people drink provides insight into behaviour and help inform public education. Participants were asked about their reasons for drinking liquor in two ways. First, an unprompted open-ended question asked for their main motivation, to explore their top-of-mind responses. As Figure 1 shows, Manitobans drink primarily for social reasons, but also because they enjoy the feeling or taste of liquor, or they drink for fun.

Figure 1 Unprompted main reason for drinking liquor²



² The *Other* category includes responses such as “to quench thirst”, “to feel a high”, “to forget worries or reduce stress”, “for health reasons”, “out of habit”, “helps when feeling depressed or nervous” and “to help sleep”.

Next, the survey asked Manitobans how often they drink liquor for 15 specific reasons, as shown in Table 3. The Drinking Motives Questionnaire (DMQ), a commonly used survey instrument, provided questions that measure the enhancement, social and coping aspects of drinking motives (Cooper, Russell, Skinner & Windle 1992). Social motives were the most commonly endorsed among the three types of motives. Many participants also reported that they drink “because it’s fun” or “to relax”. A sophisticated understanding of the motives behind liquor consumption will allow the LGA to tailor educational messaging to people with different underlying reasons for drinking.

Table 3 Frequency of drinking motives (DMQ)

| Thinking about all the times you drink, how often do you drink... | Never or almost never | Sometimes | Often | Almost always or always |
|---|-----------------------|-----------|-------|-------------------------|
| SOCIAL MOTIVES | | | | |
| As a way to celebrate? | 10.7% | 55.0% | 20.1% | 14.2% |
| To be sociable? | 17.5% | 45.5% | 19.1% | 17.9% |
| Because it is customary on special occasions? | 24.4% | 47.6% | 15.2% | 12.8% |
| Because it makes a social gathering more enjoyable? | 26.9% | 47.9% | 15.0% | 10.2% |
| Because it is what most of your friends do when you get together? | 36.3% | 38.2% | 13.5% | 12.0% |
| ENHANCEMENT MOTIVES | | | | |
| Because it’s fun? | 34.5% | 39.8% | 13.5% | 12.1% |
| Because it makes you feel good? | 47.9% | 36.6% | 8.9% | 6.6% |
| Because you like the feeling? | 49.1% | 33.8% | 9.1% | 7.9% |
| Because it’s exciting? | 73.9% | 19.6% | 3.5% | 3.0% |
| To get high? | 84.9% | 11.3% | 1.6% | 2.2% |
| COPING MOTIVES | | | | |
| To relax? | 34.7% | 46.5% | 9.3% | 9.4% |
| To cheer up when you’re in a bad mood? | 80.0% | 16.6% | 0.8% | 2.6% |
| Because you feel more self-confident or sure of yourself? | 83.5% | 13.2% | 1.6% | 1.7% |
| Because it helps when you feel depressed or nervous? | 84.1% | 13.1% | 1.0% | 1.8% |
| To forget your worries? | 85.4% | 11.2% | 1.4% | 1.9% |

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

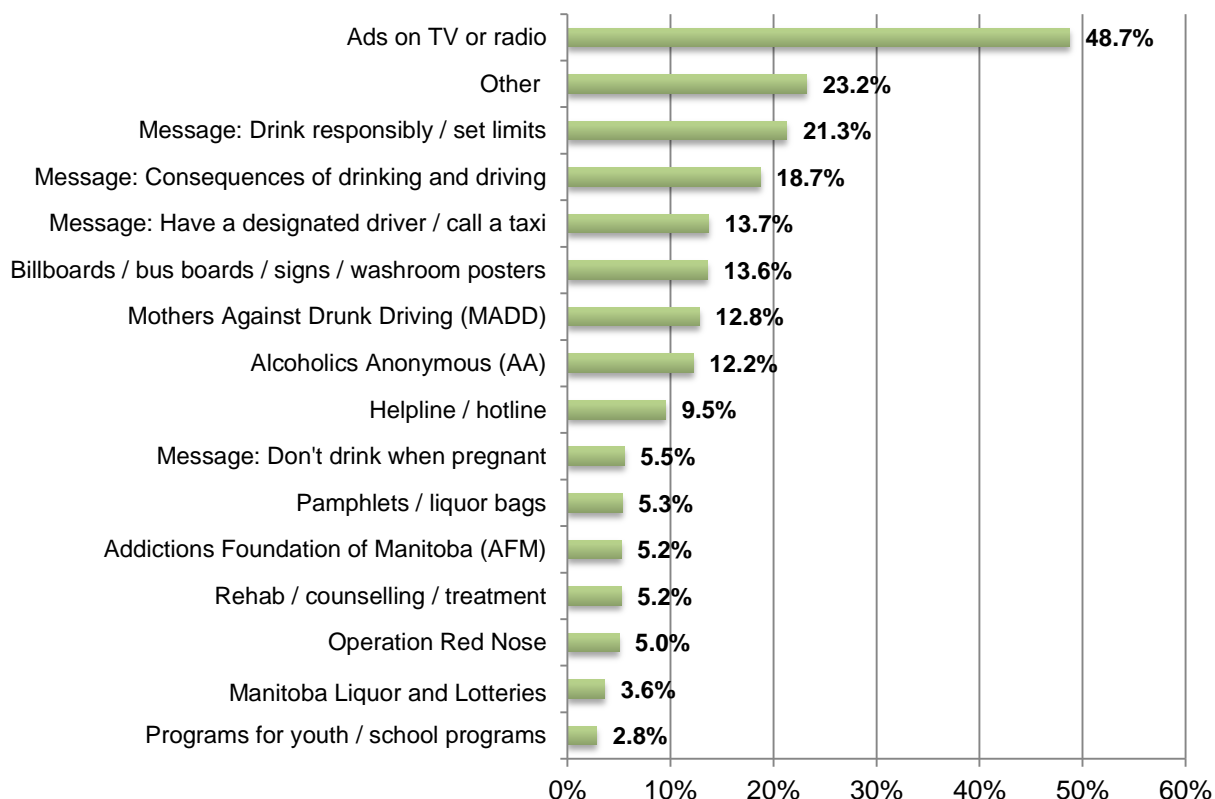
DO MANITOBANS DRINK RESPONSIBLY?

As the LGA’s mandate includes promoting responsible drinking, a significant portion of the survey questions explored this concept in some depth with participants.

Although promoting the responsible consumption of liquor is a newer regulatory responsibility for the LGA, many tools and resources have been available from other organizations, including the Addictions Foundation of Manitoba and the former Manitoba Liquor Control Commission. Three-quarters (75.9%) of Manitobans reported that they can recall seeing or hearing about tools or resources to drink responsibly.

There were demographic differences among participants regarding whether or not they remembered seeing or hearing responsible consumption messages. Recall was slightly higher among those between the ages of 35 and 64, and those with more years of education. Employed people and those reporting higher income were also more likely to remember responsible drinking resources. Manitobans residing outside of Winnipeg, in Brandon in particular, were also more likely to remember resources for responsible drinking. When asked to describe the tools or resources, the majority of Manitobans said that they had seen or heard advertisements on television or radio, as shown in Figure 2.

Figure 2 Recall of tools or resources that promote responsible drinking³



Participants were next asked how often they use a series of strategies for responsible drinking. As Table 4 shows, pre-planning transportation is the most commonly used strategy, with 65.2% of Manitobans reporting always calling a taxi or having a designated driver when they have been drinking. The proportion of Manitobans who use this strategy is highest among those in the 18 to 24 year old age group; 76.9% of these young adults report always pre-planning their transportation and another 12.4% report doing so often.

The responsible drinking strategies were analyzed to examine whether Manitobans combine multiple strategies when consuming liquor. This analysis revealed that 86.3% of Manitobans reported always using at least one of the strategies in Table 4 when drinking alcoholic

³ Percentages exceed 100% due to multiple responses. The *Other* category includes responses such as “websites”, “washrooms”, “set limits”, “Manitoba Public Insurance (MPI)” and “check stops / police”.

beverages. On average, Manitobans who drink reported always using 2.8 of these strategies⁴, and slightly more women than men reported always using at least one strategy. These findings are similar to survey results from 2013, indicating a stable understanding of responsible drinking strategies exists amongst Manitobans.

Table 4 Frequency of responsible drinking strategies

| Do you... | No/Never | Rarely | Sometimes | Often | Always |
|---|----------|--------|-----------|-------|--------|
| Pre-plan your transportation, for example by planning to call a taxi or having a designated driver? | 17.5% | 2.0% | 6.1% | 9.3% | 65.2% |
| Limit the number of drinks you have on one occasion? | 15.0% | 3.8% | 18.2% | 16.2% | 46.8% |
| Count or keep track of the number of drinks you have? | 35.9% | 5.3% | 9.9% | 11.2% | 37.7% |
| Make a point of eating while you drink alcohol? | 15.0% | 2.2% | 22.7% | 24.1% | 36.1% |
| Refuse a drink you are offered because you don't want it? | 6.6% | 3.6% | 35.2% | 19.6% | 35.1% |
| Consider your age, body weight and health when determining your limits? | 57.3% | 4.7% | 11.0% | 6.7% | 20.2% |
| Alternate between alcoholic and non-alcoholic drinks? | 38.6% | 4.2% | 24.8% | 16.2% | 16.3% |
| Drink low-alcohol drinks? | 45.5% | 7.5% | 26.4% | 8.5% | 12.1% |
| Plan non-drinking days every week to avoid developing a habit? | 75.8% | 2.6% | 5.3% | 4.4% | 11.9% |

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

In 2011, the Canadian Centre on Substance Abuse published national low-risk alcohol drinking guidelines to help promote a culture of moderation related to liquor consumption (Butt, Beirness, Gliksman, Paradis & Stockwell, 2011). Survey questions examined Manitobans' awareness of the guidelines and the extent to which they follow the two guidelines that apply to all Canadians. These are:

- **Weekly drinking guideline:** Reduce the long-term health risks associated with liquor consumption (e.g. increased risk of cancer, seizures, stroke, pancreatitis, cirrhosis, and high blood pressure) by drinking no more than 10 (for women) or 15 (for men) alcoholic beverages per week; and
- **Special occasion drinking guideline:** Reduce acute risks associated with liquor consumption (e.g. increased risk of alcohol poisoning, injuries associated with motor vehicle crashes or violent behaviour, and social embarrassment), by drinking no more than three (for women) or four (for men) alcoholic beverages on any single occasion.

The results indicate that Manitobans continue to have limited awareness of these guidelines. In 2016, 8.6% of Manitobans recalled the guidelines compared to only 6.1% in 2013, but this small difference may be due to randomness. No demographic groups were more or less likely to recall

⁴ Median = 3.0 strategies.

the guidelines. As Tables 5 and 6 show, many Manitobans reported drinking in excess of the low-risk drinking guidelines.

Among Manitobans who drank during the past year, 33.3% exceeded the weekly drinking guideline and 59.6% exceeded the special occasion drinking guideline. These indicators are measured differently than the national *Canadian Tobacco, Alcohol and Drug Use Monitoring Survey* (Health Canada 2016), which measures liquor consumption over the previous week, while the LGA measures over a 12-month period; as such the proportions are not comparable. Still, as the tables show, the majority of people who exceed these low-risk alcohol drinking guidelines reported doing so infrequently.

Table 5 Exceeded weekly drinking guideline (among those who drank liquor in the past year)

| | Never | 1-5 times a year | 6-11 times a year | Once a month | 2-3 times a month | Every week |
|---------------------------------|-------|------------------|-------------------|--------------|-------------------|------------|
| All past-year drinkers | 66.7% | 13.3% | 2.8% | 6.9% | 5.7% | 4.6% |
| Men: 15 or more drinks | 60.9% | 15.0% | 2.0% | 8.5% | 7.4% | 6.2% |
| Women: 10 or more drinks | 72.5% | 11.6% | 3.7% | 5.3% | 4.0% | 3.0% |

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

Table 6 Exceeded special occasion guideline (among those who drank liquor in the past year)

| | Never | Less than once a month | Once a month | 2-3 times a month | Once a week | 2-5 times a week | Daily or almost daily |
|----------------------------------|-------|------------------------|--------------|-------------------|-------------|------------------|-----------------------|
| All past-year drinkers | 40.4% | 26.9% | 9.6% | 9.5% | 5.5% | 6.3% | 1.6% |
| Men: More than 4 drinks | 33.9% | 25.5% | 11.0% | 11.6% | 6.9% | 9.2% | 1.9% |
| Women: More than 3 drinks | 47.0% | 28.4% | 8.3% | 7.4% | 4.1% | 3.4% | 1.3% |

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

More men than women reported exceeding both guidelines, and exceeding them more frequently. Employed Manitobans were more likely to exceed special occasion, but not weekly drinking guidelines. Higher income was associated with following special occasion guidelines, but had no significant impact on weekly guidelines.

Analysis identified an inverse relationship between age and following the guidelines; that is, Manitobans in younger age categories exceeded both guidelines more than older participants. This was especially true for special occasion limits, which suggests that younger Manitobans are more likely to “binge” drink. Information about the impact of age on responsible drinking has allowed the LGA to tailor its educational messaging to younger Manitobans, who drink at higher-risk levels. The LGA will measure the effectiveness of its public education campaigns by continuing to track the number of Manitobans who exceed these guidelines.

One new indicator included in the survey screened participants for riskier liquor consumption. The Alcohol Use Disorders Identification Test (AUDIT-C) is a short survey instrument often used in a clinical setting to determine if a patient requires further screening for problematic alcohol consumption. The AUDIT-C measures liquor consumption and performs well in accurately measuring riskier drinking behaviours (Seth, Glenshaw, Sabatier, Adams, Du Preez, DeLuca & Bock, 2015).

Table 7 shows that a quarter of men and over ten percent of women reported higher-risk drinking. Younger age was associated with higher rates of over-consumption on this measure,

which mirrors the results about exceeding the low-risk drinking guidelines. Participants who had less than high school or some post-secondary education were more likely to report excess liquor consumption than those who completed high school and post-secondary degrees. This is likely due to the impact of age and the culture of liquor consumption amongst post-secondary students. For example, small comparison groups require cautious interpretations, but students were also much more likely to report riskier drinking. Importantly, the AUDIT-C does not report the definitive presence of alcohol use disorders, but similar to Canada’s low-risk alcohol drinking guidelines, indicates a level of liquor consumption that is riskier to participants’ health.

Table 7 AUDIT-C: Levels of riskier drinking by sex

| | Minimal Risk | Moderate Risk | Increased Risk |
|-------------------------------|--------------|---------------|----------------|
| All past-year drinkers | 57.3% | 24.2% | 18.5% |
| Men | 46.0% | 28.4% | 25.6% |
| Women | 69.1% | 19.7% | 11.1% |

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

The AUDIT-C is based only on liquor consumption, with fewer questions than the full AUDIT questionnaire, and therefore, results in different calculations methods than other national prevalence surveys. It is important, however, to emphasize that the proportion of Manitobans that consume liquor at a frequency that increases their risk is comparable to other surveys. Although last fielded in 2004, the Canadian Addiction Survey measured AUDIT hazardous drinking at 15.1% in Manitoba, which is slightly higher than the national average of 13.6% (Adlaf, Begin & Sawka 2005).

Overall, these survey results show that most Manitobans are drinking liquor moderately; using responsible drinking strategies; drinking for social and entertainment motives rather than as a coping technique; and have awareness of moderate liquor consumption. However, these positive elements are tempered by the results that Manitobans are still largely unaware of Canada’s low-risk alcohol drinking guidelines and nearly 20% are at increased risk for experiencing alcohol-related harm. These results will assist the LGA to develop targeted public education initiatives to mitigate harm by informing Manitobans about the potential risks of liquor consumption.

GAMBLING

WHO GAMBLES IN MANITOBA?

This section of the survey began by asking participants how often they gamble on specific activities; results are presented in Table 8. The relative popularity of gambling activities and the average frequency of participation are comparable to previous surveys. Buying charity raffle or fundraising tickets remains the most popular form of gambling in the province; 48.1% of Manitobans reported that they purchase these tickets at least once a year (51.6% in 2013 and 61.8% in 2010). Buying lottery or instant win tickets and playing electronic gaming machines (i.e., slot machines and VLTs) are other popular gambling activities.

Online gambling remains the least popular reported form of gambling, as only 1.5% of Manitobans reported that they bet money online at least once a year (2.3% in 2010). For

comparison, the survey measured the extent to which Manitobans play poker or casino games on free Internet sites without wagering real money, which is not considered gambling. As Table 8 shows, 11.0% of participants played on free sites at least once a year (a decline from 13.7% in 2013). The LGA included a measure of daily fantasy sports participation, but only 2.0% of Manitobans reported playing daily fantasy sports at least once a year.

Table 8 Participation in specific gambling activities (highlighted activity is not considered gambling)

| | Never | Less than once a year | 1-11 times per year | 1-3 times per month | Once a week or more |
|---|-------|-----------------------|---------------------|---------------------|---------------------|
| Buying charity raffle or fundraising tickets, including charity lotteries and charity breakopens | 40.8% | 11.1% | 39.0% | 7.4% | 1.7% |
| Buying lottery, instant win or scratch tickets at lottery kiosks or through subscriptions | 41.7% | 4.8% | 23.5% | 17.1% | 12.9% |
| Playing slot machines at a casino | 67.3% | 7.3% | 17.5% | 6.4% | 1.5% |
| Playing VLTs at a bar, lounge or racetrack | 79.2% | 4.4% | 10.9% | 3.5% | 2.1% |
| Playing poker for money at home with friends or family | 83.7% | 4.5% | 10.4% | 0.8% | 0.6% |
| Playing sports lotteries like Sport Select or betting on sports pools | 84.1% | 4.7% | 7.6% | 1.9% | 1.6% |
| Betting money on card games, board games or games of skill such as pool, bowling or darts with friends and family | 87.1% | 2.6% | 7.1% | 2.2% | 1.0% |
| Playing poker or casino games on free Internet sites without wagering any real money | 87.1% | 2.0% | 3.1% | 2.5% | 5.4% |
| Playing bingo for money | 87.7% | 3.2% | 5.8% | 1.3% | 2.0% |
| Playing table games, such as blackjack and roulette, at a casino | 89.2% | 3.0% | 5.9% | 1.7% | 0.3% |
| Betting on horse races, whether live at the track or off-track | 92.2% | 3.5% | 4.0% | 0.0% | 0.3% |
| Playing poker for money in a bar, lounge or other public facility | 95.7% | 1.5% | 2.2% | 0.3% | 0.3% |
| Playing daily fantasy sports for money through websites such as DraftKings or FanDuel? | 97.3% | 0.7% | 1.2% | 0.2% | 0.6% |
| Betting money online | 97.8% | 0.7% | 0.8% | 0.0% | 0.7% |

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

Participation levels from all gambling activities divided respondents into gambler and non-gambler categories. Those who reported never participating in any of the gambling activities listed in Table 8 (i.e., excluding those 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, 74.2% of Manitobans are gamblers.

Table 9 shows the percentages of gamblers reported since the LGA began tracking this statistic. 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 9 suggests, and that some of the fluctuation is due to differences in the way the information was collected in 2004 and 2007. It does appear that gambling participation in Manitoba has been trending downward since 2010, as the same method of measuring participation has been in place over three iterations of this survey.

Table 9 Percentage of gamblers reported over time

| | 2004 | 2007 | 2010 | 2013 | 2016 |
|-----------------------------------|-------|-------|-------|-------|--------------|
| Manitobans classified as gamblers | 94.0% | 69.2% | 85.3% | 77.3% | 74.2% |

The results presented a similar demographic picture of gamblers to the one revealed in 2013, but there are a few patterns to note. Overall gambling participation does not differ significantly by sex or region. People between the ages of 35 to 64 were more likely to gamble than those 18 to 34 years old. There were also small differences in overall gambling rates based on education, with higher educational achievement reducing the likelihood of gambling participation. When analyzing the impact of employment on gambling behaviours, even while taking into account their age, students and those employed part-time were less likely to gamble than other employment categories. Gambling participation also increased with household income. This suggests that gambling continues to be a generalized entertainment option, with most adult Manitoban demographic groups almost equally likely to participate in some form of gambling activity.

Certain gambling activities exhibited stronger demographic trends. Men reported more frequent participation in daily fantasy sports betting, sports lotteries, table games and poker, both in public and at home, whereas women played bingo at higher rates. Manitobans in younger age groups were more likely than those in older groups to report playing sports lotteries, daily fantasy sports, table games, VLTs, slot machines and poker, but less likely to have gambled on other lottery tickets, bingo or charity raffles. As education increases, Manitobans were less likely to play VLTs, slot machines or bingo. Additionally, an increase in household income related to a higher likelihood of playing charity raffles.

WHY DO MANITOBANS GAMBLE?

After inquiring about their participation, gamblers were asked about their reasons for gambling. To first explore their top-of-mind responses, an unprompted open-ended question asked respondents for their main reason for gambling. As Figure 3 on the next page shows, Manitobans gamble mainly to support charity, for fun or enjoyment, for entertainment and for the chance to win money.

Manitobans were next asked how often they gamble for specific reasons, as shown in Table 10 on the next page. The Gambling Motives Questionnaire Financial (GMQ-F, Dechant 2014) measures Manitobans' reasons for gambling. The LGA developed the GMQ-F to incorporate financial motives into analyses of participants' reasons for gambling based on the original version of the GMQ (Stewart & Zack 2008). The LGA hopes that a more sophisticated understanding of the motives behind gambling will allow for tailored educational messaging to

people who gamble for different reasons. Table 10 shows that, as in previous surveys, gambling for fun, excitement and to win money were the most common motives for gambling. Few Manitobans reported gambling to earn money or gambling to cope with depression, a lack of self-confidence or bad moods.

Figure 3 Unprompted first reason for gambling⁵

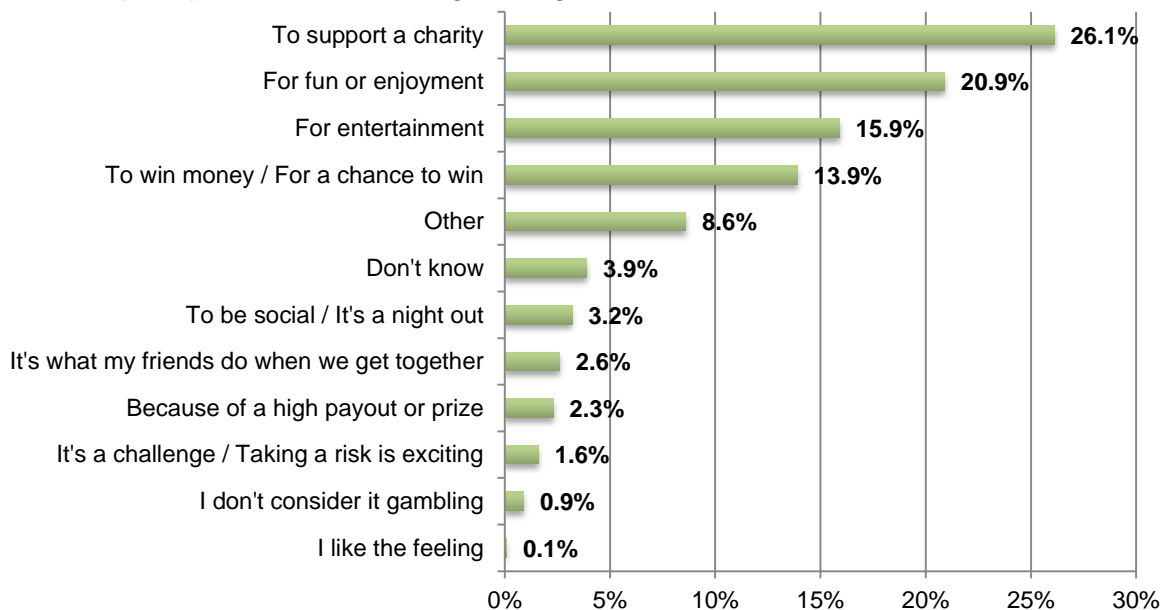


Table 10 Frequency of gambling motives (GMQ-F)

| Thinking about all the times you gamble, how often do you gamble... | Never or almost never | Sometimes | Often | Almost always or always |
|---|-----------------------|-----------|-------|-------------------------|
| SOCIAL MOTIVES (GMQ) | | | | |
| Because it's something you do on special occasions? | 48.7% | 38.4% | 6.5% | 6.5% |
| To be sociable? | 57.6% | 30.8% | 5.0% | 6.7% |
| Because it makes a social gathering more enjoyable? | 62.8% | 27.5% | 5.3% | 4.4% |
| Because it is what most of your friends do when you get together? | 77.2% | 17.7% | 2.8% | 2.3% |
| ENHANCEMENT MOTIVES (GMQ) | | | | |
| Because it's fun? | 36.0% | 35.2% | 9.9% | 18.8% |
| Because it's exciting? | 53.9% | 32.9% | 4.7% | 8.5% |
| Because you like the feeling? | 66.5% | 22.4% | 3.9% | 7.2% |
| Because it makes you feel good? | 69.2% | 23.7% | 3.8% | 3.3% |

⁵ The *Other* category includes responses such as, "it's something to do on special occasions", "to relax", to earn money", "out of curiosity" and "to feel more self-confident or sure of myself".

| Thinking about all the times you gamble, how often do you gamble... | Never or almost never | Sometimes | Often | Almost always or always |
|--|-----------------------|-----------|-------|-------------------------|
| COPING MOTIVES (GMQ) | | | | |
| To cheer up when you're in a bad mood? | 88.7% | 8.5% | 1.7% | 1.1% |
| Because you feel more self-confident or sure of yourself? | 89.7% | 6.6% | 2.0% | 1.7% |
| To forget your worries? | 91.6% | 6.3% | 0.2% | 1.8% |
| Because it helps when you feel depressed or nervous? | 96.7% | 2.6% | 0.3% | 0.4% |
| FINANCIAL MOTIVES | | | | |
| To win money? | 44.3% | 30.3% | 6.5% | 18.9% |
| Because you enjoy thinking about what you would do if you won a jackpot? | 48.0% | 34.3% | 6.1% | 11.5% |
| Because winning would change your lifestyle? | 64.3% | 20.6% | 5.2% | 9.9% |
| To earn money? | 78.0% | 13.6% | 2.0% | 6.3% |

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

DO MANITOBANS GAMBLE RESPONSIBLY?

The LGA began to track Manitobans' understanding of responsible gambling and use of limit-setting strategies in 2007 to inform its social responsibility initiatives. To explore Manitobans' understanding of gambling behaviours, participants were asked about a variety of responsible gambling techniques related to setting limits.

Respondents were asked about four different kinds of limits:

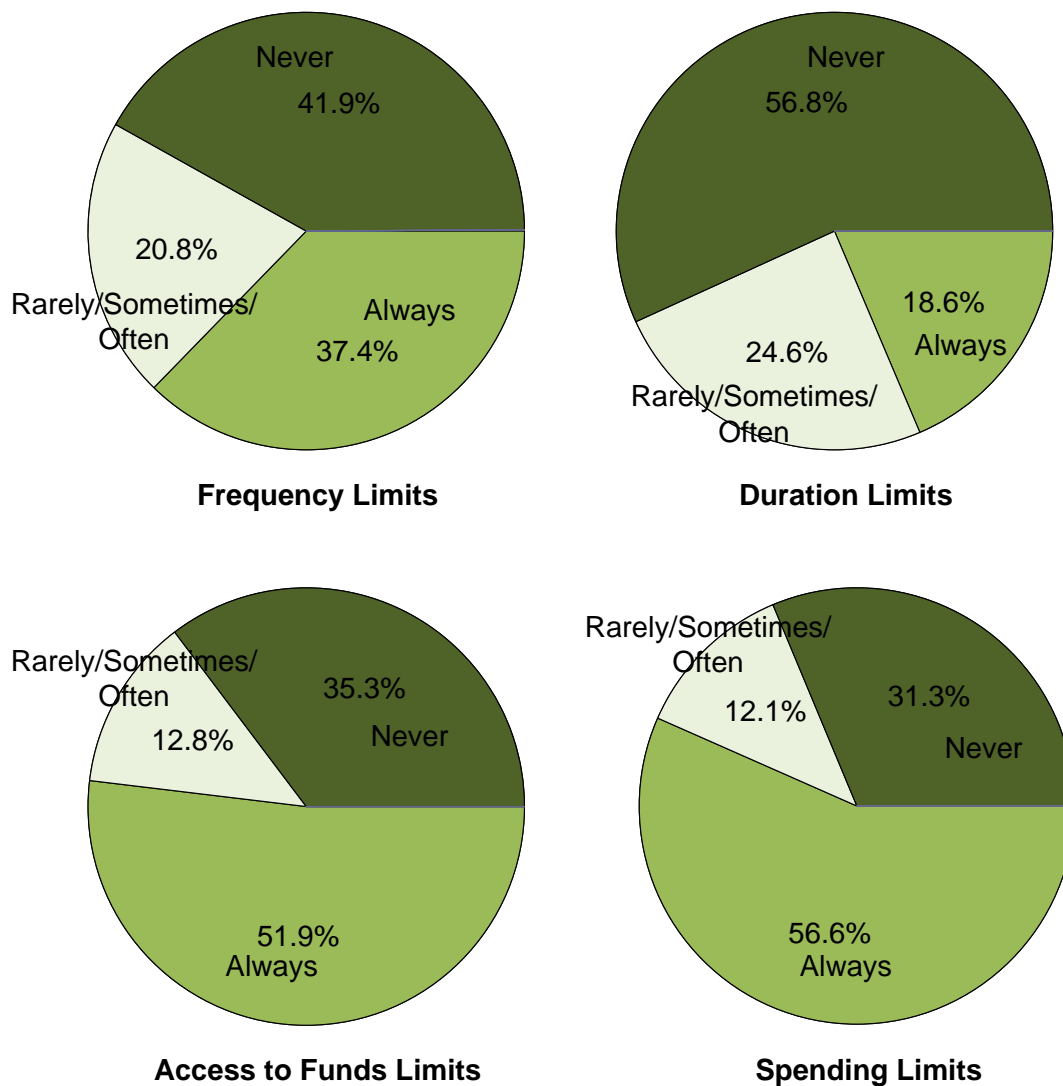
- **Duration limits:** Do you set a limit on how long you play?
- **Frequency limits:** Do you limit how often you gamble?
- **Spending limits:** Do you set a spending limit or budget where you decide in advance the maximum amount you'll spend gambling?
- **Fund access limits:** Do you limit your available cash, for example, by leaving debit cards at home or by stopping play when you run out of cash?

As in past years, setting a spending limit was the most common strategy used by Manitobans to gamble responsibly, though fund access limits have become nearly as popular, as shown in Figure 4 on the next page.

Previously, analysis revealed minimal patterns among people who limit their gambling, although some demographic groups were more likely to set certain types of limits. The current results revealed that 18 to 24 year old young adults were the most likely to set frequency, access and spending limits while gambling, with rates declining as age increased. Those reporting lower income were more likely to set time limits, but there were no differences in other limit-setting strategies. Additionally, men were consistently less likely to set limits than women. In other words, although all Manitobans benefit from responsible gambling public education, men and older adults may stand to benefit most from targeted initiatives.

Respondents who reported setting limits were asked additional questions about their average limits and how often they adhered to these limits. Those who limited the duration of their gambling reported an average limit of just over one hour (72 minutes) of play⁶ and 52.5% reported always sticking to their duration limits. Those who set frequency limits reported an average limit of 4.2 gambling sessions per month⁷ and 78.8% reported always sticking to their limits. A similar proportion (78.9%) reported always sticking to their spending limit, which was \$44.07 per gambling session on average⁸. There were only minor fluctuations in these statistics since previous surveys.

Figure 4 Use of four limit-setting strategies



Note: Total percentages in each pie chart may not equal 100% due to rounding.

⁶ Median = 60 minutes

⁷ Median = one session per month (12 sessions per year)

⁸ Median = \$20.00 per session

The limit-setting strategies were examined to determine whether Manitobans combine multiple strategies to gamble responsibly. This analysis revealed that 31.8% of Manitobans did not use any limit-setting strategies. This figure indicates that the proportions of Manitobans who do not set gambling limits are on the rise compared to 26.4% reported in 2013 and 19.5% in 2010. In other words, limit-setting has declined slightly since 2010. On average, Manitobans who gamble always used 1.7 limit-setting strategies.⁹ There were no demographic associations between setting at least one limit and region, income, employment and educational categories; however, limit-setting did vary by sex, in that men were ten percent less likely than women to always set a gambling limit.

Table 11 Percentage of gamblers who do not set gambling limits

| | 2007 | 2010 | 2013 | 2016 |
|---|-------|-------|-------|--------------|
| Manitobans who do not set limits | 36.0% | 19.5% | 26.4% | 31.8% |

Average yearly spending on gambling was estimated based on the number of gambling sessions and average spending limit. Setting spending limits on gambling was the most popular responsible gambling strategy, and research literature suggests spending less than \$1,000 per year, or less than one percent of gross household income, are effective strategies to mitigate against gambling harm (Currie, Hodgins, Wang, el-Guebaly, Wynne & Chen 2006; Currie, Hodgins, Casey, el-Guebaly, Smith, Williams, Schopflocher & Wood 2012). In 2014, the median annual gross income in Manitoba was \$74,790 (Statistics Canada 2016), which means that average Manitobans who spend more than approximately \$750 dollars annually on gambling activities are at an increased risk for developing gambling problems.

56% of limit-setters set spending limits, and nearly 80% reported adhering to their spending limits while gambling. In terms of how much participants spent on a gambling session, the mean was \$44.07, although the median and mode were both \$20.00. The average frequency limit set by gamblers was 4.29 sessions per month. Therefore, average annual spending on gambling per year amongst those who set limits can be estimated at \$2,269, which is well above the recommended one percent of gross income when basing on the median annual gross income in Manitoba. Even when using the median spending limit of \$20.00 per session, total annual gambling expenditures is estimated at \$1,030. In other words, even by conservative measures, Manitobans who set limits while they gamble exceed the recommended spending amount. Effective limit-setting in the gambling field is still under debate, however, and it is important to adjust gambling behaviours to match what is the most appropriate for an individual's circumstances (e.g. spending limits may be best for some, while time limits are better for others, etc.). The LGA is currently involved on a committee overseeing the development of a standardized national set of low-risk gambling guidelines, which will provide consistent information to help Canadians make informed choices and moderate their gambling.

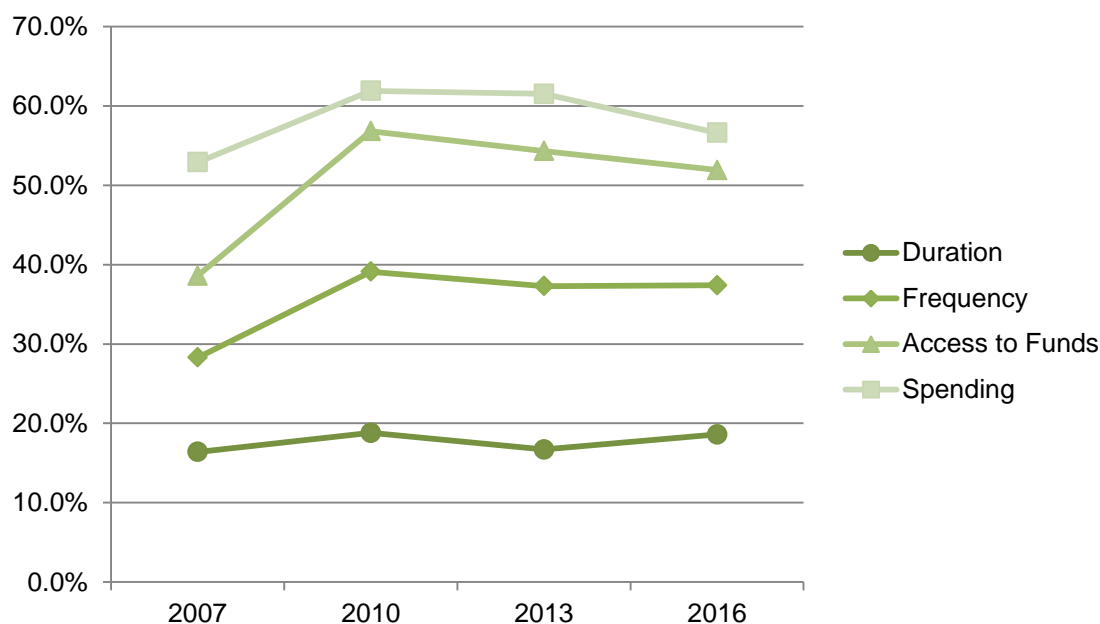
While limit-setting strategies are widely used amongst Manitobans, Figure 5 on the next page illustrates that use of three of the four limit-setting strategies (based on participants who reported they always used this strategy) have declined since 2010. While all four limit strategies saw an increase between 2007 and 2010, it is important to note that the former Manitoba

⁹ Median = 2.0 strategies

Gambling Control Commission (which amalgamated with the regulatory services division of the former Manitoba Liquor Control Commission to form the LGA in 2014) ran a province-wide public education campaign on limit-setting strategies from 2008 to 2010. Although the fluctuations in the current survey are not large, the overall pattern suggests that Manitobans may benefit from renewed education initiatives on limit-setting.

Based on these preliminary analyses, several implications are important to note. Firstly, limit-setting behaviours are less likely amongst older and male gamblers in the province. Additionally, Manitobans who set spending limits are still exceeding recommended thresholds to mitigate risks of gambling-related harm. Finally, not all gamblers responded that they set limits. Nearly one third of gamblers set no limits whatsoever, and therefore, limit-setting public education would be beneficial to reinforce responsible gambling awareness and strategies.

Figure 5 Patterns of always using limit-setting strategies over time

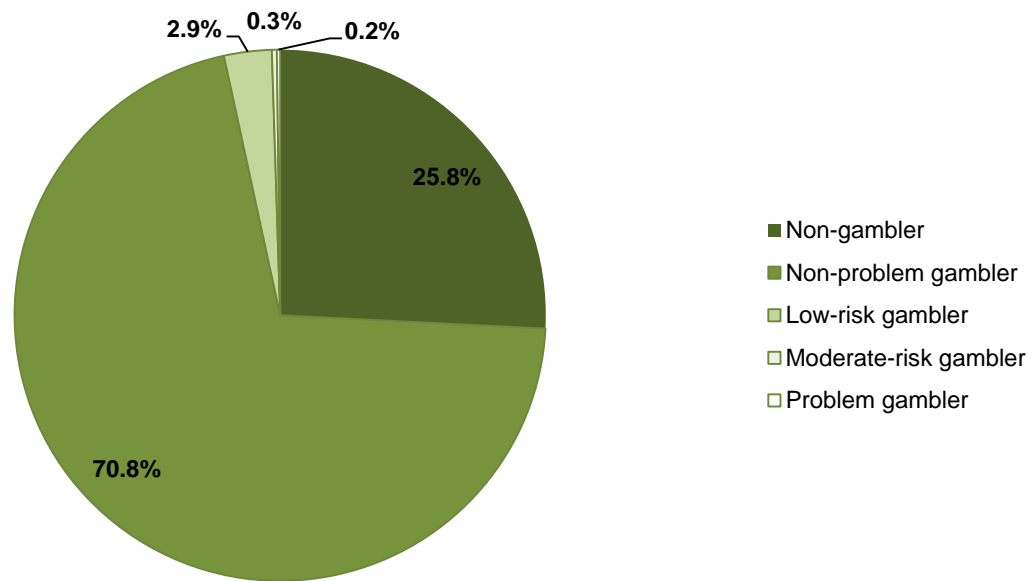


The survey next asked questions from the Canadian Problem Gambling Index (CPGI, Ferris & Wynne 2001) to measure the prevalence of riskier gambling behaviours, including problem gambling. More recent work achieved improvements in the psychometric properties of the CPGI's problem gambling severity index (PGSI) by adjusting the thresholds for the different gambling categories (Currie, Casey & Hodgins 2010). The PGSI is a validated tool to measure the proportion of Manitobans who gamble at risky levels.

As shown in Figure 6 on the next page, the vast majority of Manitobans (96.6%) either do not gamble or their gambling behaviour does not indicate that they are at any risk of experiencing harm. In 2013, the LGA measured low-risk gambling at 11.0%, which has now fallen to 2.9% of the population in 2016. Similarly, only 0.3% (1.2% in 2013) reported behaviours suggesting moderate risk levels and 0.2% (0.8% in 2013) of Manitobans reported behaviours that classify them as problem gamblers. It is too early to determine if these measures are the result of randomness, or if there has been such a significant decrease in low- or moderate-risk and

problem gambling behaviours. Accurate data about the distribution of gambling-related harm in the population assists the LGA to develop effective public education initiatives, and the LGA will continue to track patterns of problem gambling in future surveys.

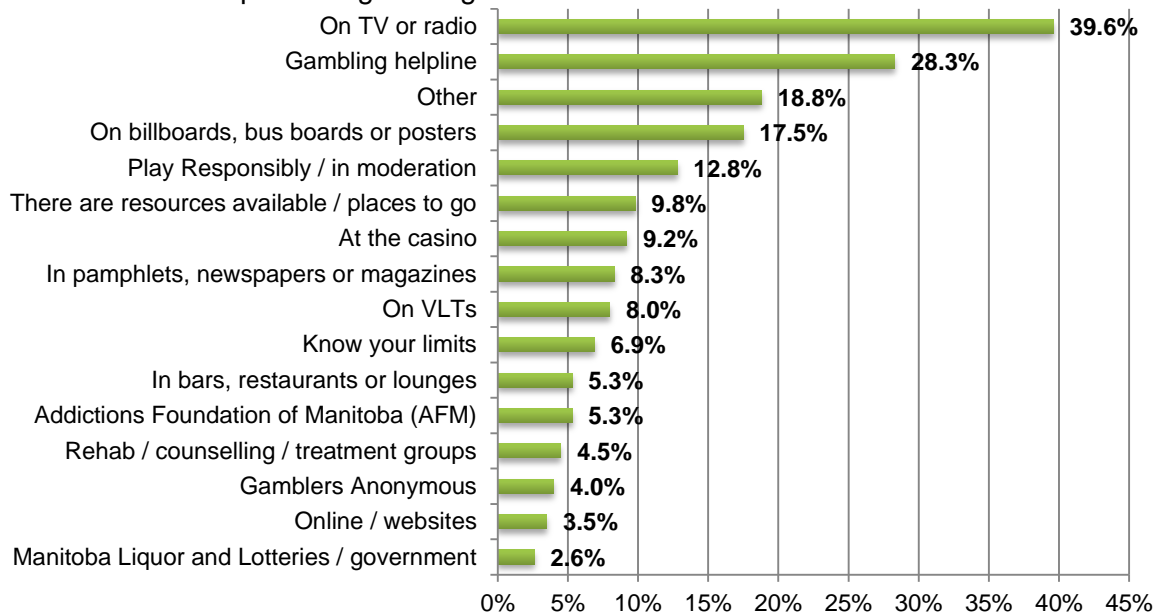
Figure 6 PGSI risk levels



Although there were no relationships between demographic groups and gambling risk levels, it is important to consider that the low percentages in the moderate-risk and problem gambler classifications cause difficulties in running robust assessments of the association between these categories.

Finally, participants were asked about their recall of tools or resources available to promote responsible gambling. Overall, 67.6% (a decline from 72.7% in 2013) of participants recalled seeing or hearing about tools or resources. The majority of those who reported general recall said that they had seen or heard advertisements on television or radio, as shown in Figure 7 on the next page. General recall was slightly higher for the 35 to 64 year old age categories, those living outside of Winnipeg (particularly in Brandon), those completing higher levels of education, and those with greater household incomes.

Figure 7 Recall of responsible gambling tools or resources¹⁰



It is encouraging that participants in the survey easily recalled a variety of responsible gambling resources and strategies. Overall, there is also awareness amongst Manitobans of the need to set limits to gamble responsibly. Upon interpretation of these results, however, it may be useful to consider refining public education for responsible gambling to include information about precise ways people can minimize their risk, such as ensuring their gambling spending does not exceed one percent of their income, or that setting frequency, time, access to funds and spending limits help to prevent riskier gambling behaviours.

¹⁰ Percentages exceed 100% due to multiple responses. The *Other* category includes responses such as, “workplace programs”, “messages to keep it a game”, “information at lottery kiosks”, “casino self-exclusion”, “in washrooms” and “on the backs of tickets”.

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APPENDIX A: METHODOLOGY

The LGA contracted Prairie Research Associates (PRA) Inc. to conduct the 15 to 20 minute telephone survey with a representative sample of adult Manitobans. The LGA developed the 99-item survey instrument based on its previous studies and included new questions on alcohol use. PRA conducted a pretest with ten participants to allow for revisions that facilitated better participant comprehension of the questions.

PRA used a stratified sampling technique to ensure the inclusion of participants from the major regions of the province: Winnipeg, Brandon, southern and northern Manitoba. The telephone survey took place over four weeks from June 7 to July 10, 2016, from PRA's call centre in Winnipeg. Multiple call attempts to non-responders varied by day of the week and time of day to ensure higher response rates.

Using the Marketing Research and Intelligence Association's calculations, the response rate for the survey is 16.0%. Lower response rates are a growing limitation for survey research, because of the higher number of people without landlines and the higher refusal rates of mobile phone respondents. The low response rate could also be due to the average length of the survey (over 16 minutes). Tables 9 and 10 outline the detailed call record and theoretical error rates based on region. Due to the stratified sampling technique, the theoretical error rate for the province is +/- 2.8%.

Where the random sample diverged from population data, weights based on the 2011 Canadian Census corrected for minor discrepancies in sex, age, and household income. Table 11 shows the demographic characteristics, comparing the weighted, un-weighted, and population data. This report presents analysis calculated with weighted data. All quantitative analysis used the SPSS 24.0 software package, including testing for any differences in participant subpopulations. Analysis involved non-parametric tests because most dataset variables consisted of nominal and ordinal measures. The LGA acknowledges that statistical inferences to a population from a sample must be considered in relation to the power of statistical tests used. Readers should use caution when inferring the findings of this report to the population due to the ordinal and nominal-level tests conducted. Relationships presented in this report were statistically significant with p-values equaling less than .05. Intended for general audiences, this report does not present test statistics or specific significance levels, although interested readers are welcome to contact the LGA for these details.

Table 12 Call Record

| | | N | % |
|------|--|--------------|------|
| A | Total numbers attempted | 22,342 | 100% |
| 1. | Not in service | 7,258 | 33% |
| 2. | Fax | 187 | 1% |
| 3. | Business | 252 | 1% |
| | Remaining | 14,645 | 66% |
| B | Total eligible numbers | 14,645 | 100% |
| 4. | Busy | 198 | 1% |
| 5. | Answering machines | 929 | 6% |
| 6. | No answer | 5,498 | 38% |
| 7/8. | Language/illness/incapability | 433 | 3% |
| 9. | Selected/eligible respondent not available | 255 | 2% |
| | Remaining | 7,332 | 50% |
| C | Total asked | 7,332 | 100% |
| 10. | Household refusal | 434 | 6% |
| 11. | Respondent refusal | 4,556 | 62% |
| 12. | Qualified respondent break off | 50 | 1% |
| | Remaining | 2,292 | 31% |
| D | Co-operative contacts | 2,292 | 100% |
| 13. | Disqualified | 1,092 | 48% |
| 14. | Completed interviews | 1,200 | 52% |
| | Refusal rate = (10+11+12)/C | 5,040/7,332 | 69% |
| | Response rate (D/B) | 2,292/14,645 | 16% |
| | Completion rate (14/B) | 1,200/14,645 | 8% |

Table 13 Call record

| Region | Population 18 and older* | Completed surveys | Error rate (+/-) |
|---------------------|-----------------------------|----------------------|---------------------|
| Manitoba | 972,225 | 1,200 | ± 2.8% |
| Winnipeg | 525,450 | 622 | ± 3.9% |
| Rural Manitoba | 446,805 | 578 | ± 4.1% |
| Brandon | 49,825 | 143 | ± 8.2% |
| Southern Manitoba** | 351,770 | 301 | ± 5.6% |
| Northern Manitoba** | 45,210 | 134 | ± 8.5% |

* Based on 2011 Canadian Census data.

** Southern Manitoba includes census subdivisions 1 through 10 and 12 to 20 (excluding Brandon). Northern Manitoba includes census subdivisions 21 to 23.

Table 11 Demographic characteristics

| | Population % | Unweighted sample % | Weighted sample % |
|--|--------------|---------------------|-------------------|
| Region (18 and older) | | | |
| Winnipeg | 54.0% | 49.7% | 53.4% |
| Rural Manitoba | 46.0% | 50.3% | 46.6% |
| Brandon | 5.1% | 11.7% | 10.4% |
| Southern Manitoba | 36.2% | 27.4% | 26.3% |
| Northern Manitoba | 4.7% | 11.3% | 9.9% |
| Sex (18 and older) | | | |
| Female | 51.4% | 60.8% | 51.1% |
| Male | 48.6% | 39.3% | 48.9% |
| Age (years) | | | |
| 18 to 24 | 12.7% | 6.3% | 13.7% |
| 25 to 34 | 16.6% | 10.8% | 17.1% |
| 35 to 44 | 16.6% | 16.8% | 15.4% |
| 45 to 54 | 19.5% | 17.0% | 12.6% |
| 55 to 64 | 16.1% | 26.0% | 20.4% |
| 65 to 74 | 9.6% | 14.1% | 12.6% |
| 75 and older | 9.1% | 7.2% | 6.6% |
| Don't know/no response | - | 1.8% | 1.6% |
| Education* | | | |
| Less than high school | 25.1% | 8.2% | 8.4% |
| Completed high school | 27.7% | 24.1% | 25.8% |
| Some post-secondary | - | 14.8% | 16.5% |
| Completed post-secondary | 47.2% | 52.2% | 48.2% |
| Don't know/no response | - | 0.8% | 1.1% |
| Household income (18 and older)** | | | |
| Under \$20,000 | 14.2% | 5.9% | 11.4% |
| \$20,000 to \$30,000 | 9.5% | 6.7% | 7.6% |
| \$30,000 to \$50,000 | 22.0% | 12.2% | 14.9% |
| \$50,000 to \$80,000 | 23.2% | 21.7% | 17.5% |
| \$80,000 to \$100,000 | 11.0% | 8.4% | 8.5% |
| More than \$100,000 | 22.1% | 21.6% | 16.8% |
| Don't know/no response | - | 23.6% | 23.4% |
| Employment status*** | | | |
| Employed full-time | 63.8% | 46.3% | 47.2% |
| Employed part-time | | 11.9% | 11.8% |
| Unemployed | 4.0% | 9.2% | 9.8% |
| Student | 32.2% | 2.2% | 4.4% |
| Retired | | 29.8% | 25.8% |
| Don't know/no response | - | 0.8% | 0.9% |

Note: Information shown for region, sex, and age is based on 2011 Canadian Census data.

* Education is based on those aged 15 years and older based on National Household Survey data from 2011, and does not include a category for 'some post-secondary education'.

** Household income based on National Household Survey data from 2011.

*** Employment status based on those aged 15 years and older from Statistics Canada labour force statistics for May 2016. Census information does not break down employment into full- and part-time categories. The survey includes 'homemaker' and 'out of labour force' in unemployed, while Statistics Canada includes these with 'student' and 'retired'.