

Nova Scotia Gaming Corporation
Support4Sport /Fall 2009

December 8, 2009

Highlights Report



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1.0 Executive Summary

1.1 Background, Purpose, and Methodology

The Nova Scotia Gaming Corporation (NSGC) commissioned Thinkwell Research to conduct a comprehensive survey to measure awareness and approval of NSGC's Support4Sport program among Nova Scotians. The NSGC is primarily interested in obtaining information on several overarching themes as they relate to the Support4Sport program:

- Overall importance of having gambling revenues returned to the community
- Support for having gambling revenues designated for specific community projects
- Various levels of awareness of the Support4Sport program and its goals
- Various levels of awareness of the Support4Sport awareness program
- Support for the Support4Sport program

In consultation with staff from NSGC staff and Revolve, Thinkwell Research developed the survey instrument. The survey was conducted by telephone among a random sample of 401 adult Nova Scotians aged 19 and older. Data was weighted by age, region, and gender to ensure the final sample was representative of the province's population. The reader should note that this sample size is smaller than that used in the April 2009 studies (n=1,000), resulting in a higher overall margin of error (+/- 4.9% versus +/- 3.1%, 19 times out of 20).

The interviews were conducted between October 23 and October 28, 2009 by IMP Customer Care – Market Research Division, from their call centre facility in Windsor, Nova Scotia.

1.2 Key Findings

The improved performance of the program is especially noteworthy given that the number of non gamblers is slightly higher in this survey compared to April 2009.

Gambling activity is positively correlated with many of the evaluation measures in this study, and the number of gamblers (defined as having participated in at least one gambling activity in the previous 12 months) is 5 percentage points lower in this survey compared to the previous study.

Unaided recall of the Support4Sport awareness program slipped marginally to (11% to 9%) since April, but aided recall increased (7% to 11%). As in April, most Nova Scotians were exposed to the advertising through television.

Among those who saw the advertising, most found it likeable (83% had a positive impression, up 16 points since April), believable (91% believe the funds support community activities, up 12), agree that amateur sports organizations need additional funding (89%, down 3), and say that it is important to them personally that these organizations receive it (88%, up 6).

More than one-half (51%) have now heard of Support4Sport on an aided basis. This is an increase of 6 points since April 2009, and represents an all-time high since tracking began for this question in April 2007. Two percent can identify Support4Sport on an unaided basis as a program that funds specific programs in the community, down 2 points since April. Although the unaided recall rate dropped by 2 points, this is not large enough to conclude that unaided awareness actually dropped during this time-frame. The drop is not large enough to be statistically significant.

Nearly five in six (84%) support the Support4Sport program, up 3 points since April and the highest level of support ever recorded. As in the past, younger Nova Scotians and the most frequent gamblers are the most likely to support the program.

More than one-half (55%, down 10) believe Support4Sport funds have a great impact or somewhat of an impact on the Province of Nova Scotia. This belief continues to be most common among younger Nova Scotians and more frequent gamblers.

About five in six (86%, down 3 since April) Nova Scotians believe it is important for gambling revenues to be returned to the community. Dedicating funds to specific projects also remains popular (81% support, up 3).

1.3 Evaluation targets

The tables in this section outline the evaluation measures and actual results for the Support4Sport program. The “post (April)” column shows the results from the last post-program study conducted in April 2009. The “goal” column displays the target set for the measure for the current (October 2009) wave of research, and the “post” column shows the actual result in the current survey.

Awareness and Opinions of Support4Sport

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Unaided awareness of Support4Sport	4%	6%	2%	No
Aided awareness of Support4Sport	45%	40%	51%	Yes
Knowledge of Support4Sport goals and its purpose	8%	20%	7%	No
Opinion of level of impact Support4Sport funds have on the Province (great/somewhat of an impact)	65%	65%	55%	No

Awareness and Opinion of Support4Sport Awareness Program

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Unaided awareness of Support4Sport awareness program	11%	15%	9%	No
Aided awareness of Support4Sport awareness program	7%	10%	11%	Yes
Awareness of the need for sport funding	92%	90%	89% of those aware of the program	No
Likeability of awareness program (very/somewhat positive impression)	67%	65%	83% of those aware of program	Yes

Importance of the message to you individually (very/somewhat important)	82%	80%	88% of those aware of the program	Yes
Believability of awareness program (believe funds support community activities)	79%	80%	91% of those aware of program	Yes

Dedicated Funding

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Importance of returning gambling revenues to the community (very/somewhat important)	89%	85%	86%	Yes

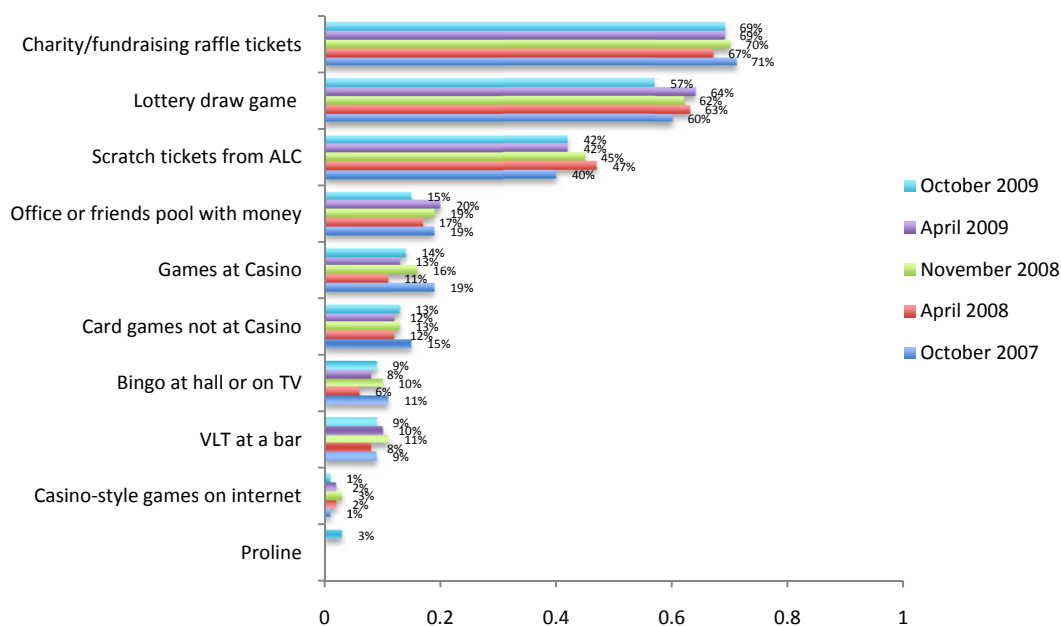
2.0 Detailed Findings

2.1 General opinions

2.1.1 Gambling activity

In order to provide us with an analytical context for this study, we asked Nova Scotians to indicate whether or not they had engaged in a series of gambling activities at least once within the past 12 months. **The vast majority of residents (83%) reported that they had played one of the nine activities at least once in the past year (down 5 since April).** A full list of activities and the level of play as it compares to previous reports is provided below.

Figure 1 – Reported gambling activity (past 12 months)



Respondents were grouped into four categories based on the number of activities that they had participated in over the past 12 months. The groups are as follows:

- **Non gambler** (participation in none of the listed activities): **17% (+5 since Apr.09)**
- **Mild gambler** (participation in 1 or 2 of the listed activities): **38% (-3)**
- **Moderate gambler** (participation in 3 or 4 of the listed activities): **34% (-3)**
- **Frequent gambler** (participation in 5 or more of the listed activities): **10% (N/C)**

These groups will be used occasionally throughout this report to outline possible differences in opinions and awareness.

2.2 Use of gambling revenues

As in April, most Nova Scotians support the concept of returning gambling revenues to the community with a slightly greater intensity of support: a total of 86% rate this as either very (71%) or somewhat (15%) important (15%). Although this represents a small decline compared to the April study (down 3), it exceeds the evaluation target set for the program (85%).

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Importance of returning gambling revenues to the community (very/somewhat important)	89%	85%	86%	Yes

Young (19-34) Nova Scotians are less likely to believe this is *very important* than other Nova Scotians (59%, compared to 75% and 77% for middle-age and older Nova Scotians respectively).

Similar to April, dedicating gambling revenues to specific projects or programs continues to be strongly supported with over four in five adult Nova Scotians saying they either completely (36%) or mostly (45%) support this idea, up 3 points. *Complete* support for this policy is highest among middle age Nova Scotians (52%) and frequent gamblers (42%).

2.3 Support4Sport Awareness

2.3.1 Unaided Awareness of the program

Consistent with past studies, only a small number (2%, down 2 since April) of adult Nova Scotians can name the Support4Sport program on an unaided basis (when asked to name any community programs or products supported by gambling revenues). Unaided awareness questions are intentionally general in nature (in order to avoid leading the respondent). In this case, it may be that the very general reference to "gambling revenues" may not have been specific enough for people to think of the Support4Sport program. If respondents had been asked about lottery ticket revenues specifically, the results may have been higher. A related issue, of course, is the fact that many people do not equate draw/scratch tickets with gambling per se.

Although the unaided recall rate dropped by 2 points, this is not large enough to conclude that unaided awareness actually dropped during this time-frame. The drop is not large enough to be statistically significant.

Another 3% (down 1) made a general mention of lottery tickets for sports. Hospital lotteries (4%, down 4) and sports organizations in general (4%, unchanged) continue to be popular responses.

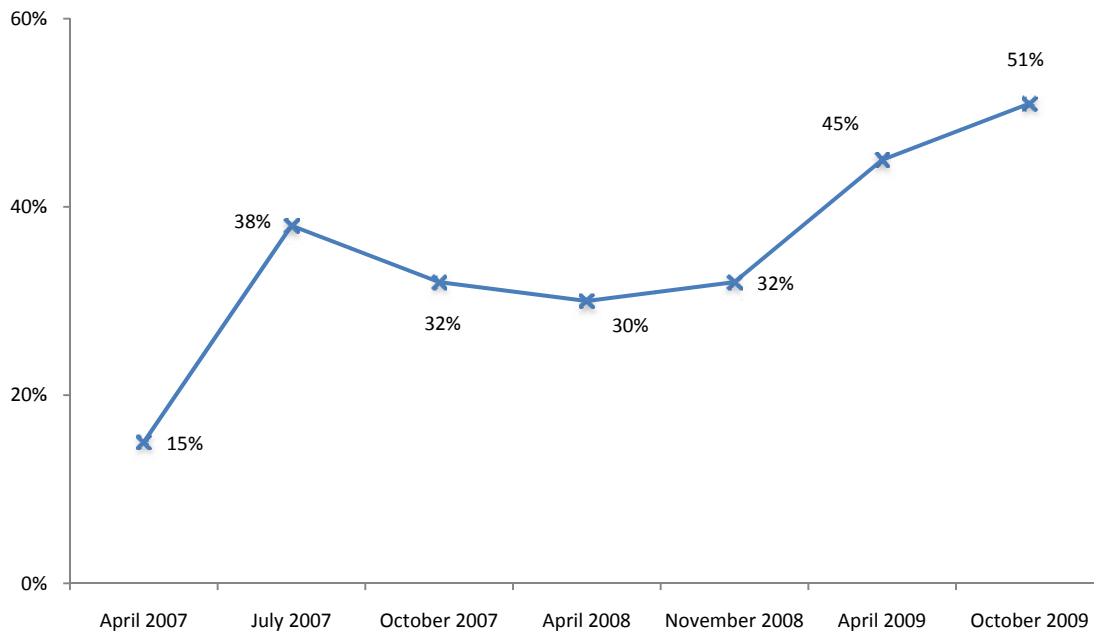
Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Unaided awareness of Support4Sport	4%	6%	2%	No

2.3.2 Aided Awareness of the program

When asked directly, however, just over one-half (51%) of Nova Scotians say they have heard of the Support4Sport program. This represents a 6 point increase from April, continues the upward trend of awareness, and is the highest level of aided awareness registered since we began tracking this question for the NSGC in April 2007. This awareness level also exceeds the target of 40% set for this evaluation.

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Aided awareness of Support4Sport	45%	40%	51%	Yes

Awareness of Support4Sport rises with education, peaking at 60% among college graduates and 56% among those with a university education.

Figure 3: Aided awareness of Support4Sport program (SRI & S4S Studies)

2.3.2 Awareness of Support4Sport goals

Among the one-half of Nova Scotians who are aware (aided) of the Support4Sport program, less than one in ten (7%, down 1 point from April) are able to articulate the goal of the program in its most precise form - using lottery funds to support amateur sports. As in the spring, this result falls short of the evaluation target of 20%.

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Knowledge of Support4Sport goals and its purpose	8%	20%	7%	No

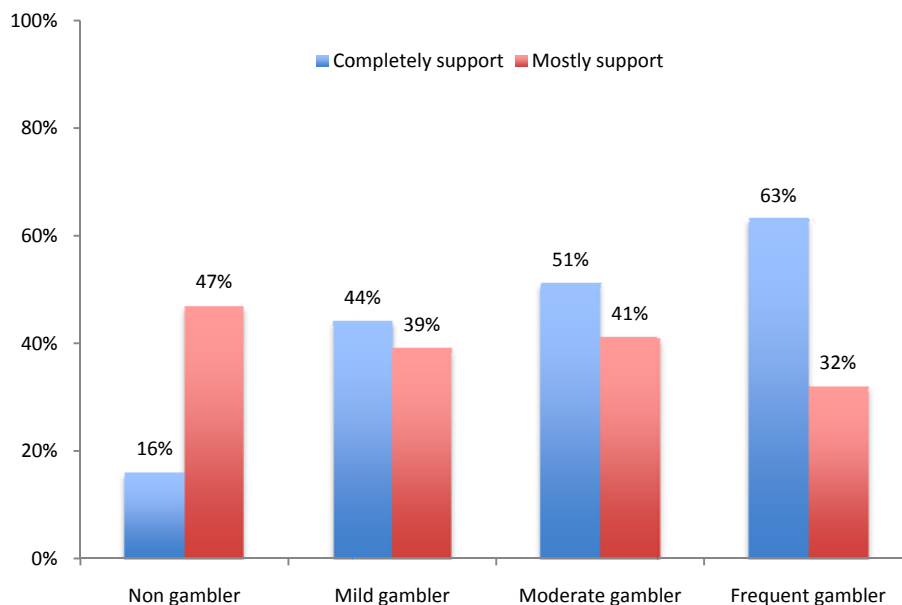
One in four Nova Scotians (25%, down 3) believe the goal is to “assist children/families who cannot afford sports” while one in five (20%, down 11) made a general mention of supporting sports. There has been a significant increase since April in the number of Nova Scotians who believe that the goal of the Support4Sport program is to “raise money for the Olympics” (7%, up 6).

Unaided Description of Support4Sport	April 2009	October 2009
Assist children/families who cannot afford sports	28%	25%
Supporting sports (general mention)	31%	20%
Using lottery ticket funds to support amateur sports	8%	7%
Raise money for Olympics	1%	7%
Supports amateur sports	3%	4%
Using gambling funds for sports	1%	1%
Using lottery ticket funds for sports	1%	0%
Other	2%	16%
Don't know	27%	26%

2.4 Support for the program

After being read a description of Support4Sport, nearly five in six (84%) adult Nova Scotians either completely (44%, up 8 points from April) or mostly (40%, down 5) support the program. This level of total support is the highest level recorded to date.

Figure 5 – Support for Support4Sport by gambling level



As in the past, both total and *complete* support for the program continues to increase as gambling participation rises (Non-16% *complete* support, Mild-44%, Moderate-51%, Frequent-63%).

2.5 Effects of Support4Sport

2.5.3 Impact funds have on the Province of Nova Scotia

Over one-half (55%) of Nova Scotians believe that the funds from the Support4Sport program have either a “great” (10%) or “somewhat” (45%) of an impact on the province, down 10 points from April, and short of the evaluation target of 55%.

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Opinion of level of impact Support4Sport funds have on the Province (great/somewhat of an impact)	65%	65%	55%	No

As in the past, frequent gamblers and young Nova Scotians are the most likely to believe that the Support4Sport funds have at least *somewhat* of an impact on the province.

2.6 Support4Sport Awareness Program Recall

2.6.1 Unaided and aided program awareness

Over four in ten (42%) respondents have seen, read or heard advertisements recently about amateur sports in the province (up 6 since April). Those who recall these advertisements were asked to describe them to our interviewers. The responses varied significantly.

On an unaided basis, just fewer than one in ten adult Nova Scotians (9%) identified at least one of the advertisements or referred to Support4Sport specifically (down 2 since April). This represents the level of *unaided* recall for the Support4Sport program, and falls short of the evaluation target (15%).

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Unaided awareness of Support4Sport awareness program	11%	15%	9%	No
Aided awareness of Support4Sport awareness program	7%	10%	11%	Yes

At the same time, aided awareness of the awareness program has increased from 7% in April to 11% in the current survey, exceeding the evaluation target of 10% aided recall. Aided recall among residents in the Valley (17%) remains higher than in other regions of the province.

Consistent with past findings, those who recall the advertising are most likely to report seeing it on television (57%, down 5 since April), followed by newspapers (21%, down 2) and radio (14%, up 14).

Among those who saw the advertising on television, over three in five (62%, up 5) viewed the ad on CTV/ATV, well ahead of those who saw it on CBC (15%, down 9) or Global (6%, down 1).

2.6.2 Reaction to the program

The reaction to the program was largely positive among those adult Nova Scotians who were aware of the advertising.

Over four in five (83%) individuals in this group report that the advertising made either a positive (38%) or somewhat positive (45%) impression on them. This is up significantly (+16 points) since April, and is well above the evaluation target of 65%.

Most Nova Scotians also largely rated the awareness program as being either very (51%) or somewhat (40%) believable, up 12 points since April, and also exceeding the evaluation target of 80%.

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Likeability of awareness program (very/somewhat positive impression)	67%	65%	83%	Yes
Believability of awareness program (believe funds support community activities)	79%	80%	91%	Yes

Also, those who saw the ad are more convinced of its merits than the general adult population. Close to nine in ten (89%) Nova Scotians who saw the ad say that amateur sports organizations in Nova Scotia are in need of additional funding to support their activities. This is just 1 point below the evaluation target, and 9 points greater than the general adult population.

Finally, more than five in six adult Nova Scotians who were exposed to the advertising report that it is either very (55%) or somewhat (33%) important to them personally that additional funding is provided to amateur sports. This total (88%) exceeds the evaluation target (80%) for this measure. Comparatively, 83% of all adult Nova Scotians say that this additional funding is important to them personally.

Measure	Post (April)	Goal (Oct.)	Post (Oct.)	Goal met?
Awareness of the need for sport funding	92%	90% of those aware of the program	89%	No
Importance of the message to you individually (very/somewhat important)	82%	80% of those aware of the program	88%	Yes

3.0 About Thinkwell Research

Thinkwell Research is a Halifax, Nova Scotia based market and public opinion research firm.

Thinkwell has conducted a large number of research projects for clients in a wide range of sectors including government, post secondary education, personal finance, telecommunications, energy, retail, natural resources, agriculture, personal fitness, and information technology. In the process, Thinkwell has conducted customer and employee satisfaction surveys, market feasibility studies, public policy and political surveys, literature reviews (secondary research) and brand positioning research.

Thinkwell Research is proud to be the Atlantic Canadian member of the **Nanos Research Group**. Nanos Research (formerly SES) is one of North America's premier marketing and public opinion research firms. The Nanos Research Group is a national team of like-minded research professionals and organizations bound by a common commitment to quality research and services as well as superior research outcomes.

Thinkwell's membership in this group allows our clients to access a network of marketing research companies throughout Canada. In addition, Thinkwell has access to a broad network of research professionals who can serve in a consulting capacity on projects conducted by Thinkwell in Atlantic Canadian markets.

Thinkwell has successfully completed the Market Research Intelligence Association (MRIA) **Gold Seal** certification. MRIA's Gold Seal Certification involves a monitored self-assessment process – working with an independent, third party Reviewer – based on the certification process of the former Canadian Association of Market Research Organizations. Gold Seal Certification is one of MRIA's primary mechanisms for developing and delivering world-class professional standards and ensuring member compliance.

Confidentiality

As with any public opinion research project, confidentiality is of the utmost importance.

Thinkwell Research has established high standards for the safeguarding of personal information based on the ten principles set out in the Canadian Personal Information Protection and Electronic Documents Act (PIPEDA). For more information on our privacy policy, please visit <http://www.thinkwellresearch.ca/privacy.html>.

Len Preeper, President and Founder

Len Preeper is the owner and President of Thinkwell Research. He began working in the public opinion and market research industry in 1995 with Corporate Research Associates. In 1996 he joined the Nova Scotia government where he served in a variety of research and policy advisory roles before co-founding OpinionTrac Research in the fall of 2000. He founded Thinkwell Research in August of 2003.

During his research career Len has conducted a number of research projects for government departments and private sector clients, including Sobeys, Irving Oil, Aliant Telecom, Emera/Nova Scotia Power, National Sea, the Nova Scotia Department of Energy, the Nova Scotia Department of Justice, the Nova Scotia Department of Transportation & Public Works, the Nova Scotia Gaming Corporation, Nova Scotia Health Promotion, the Canadian Cancer Society, Smoke Free Nova Scotia, the Coady International Institute, the GrowthWorks Atlantic Venture Fund, the Canadian Petroleum Products Institute, Dalhousie University, Mount Saint Vincent University, Tourism PEI, ACOA and the CBC. He has managed three large scale syndicated research projects - the CRA Atlantic Omnibus Survey, the OpinionTrac Quarterly Review, and the Nextbus Survey.

Len is a Professional Member of the Marketing Research and Intelligence Association (MRIA), a Canadian not-for-profit association representing all aspects of the market intelligence and survey research industry. He has also been employed as a part-time professor of political science at Acadia University. He has taught an introductory level class in political science and a third-year undergraduate course in public opinion and polling.

Len has a Bachelor of Arts (Honours) degree in Political Science from Acadia University and a Master of Arts degree in Political Studies from Queen's University.

4.0 Methodology

4.1 Survey design

The questionnaire was designed by Thinkwell Research in consultation with the Nova Scotia Gaming Corporation (NSGC) and experts from Revolve.

4.2 Sample Design and Selection

The sample for this study was provided by *Sampling Model Research Technologies Inc.* (SMRT), who maintains a robust database list of Nova Scotian households. SMRT has been providing sample to market research firms for over 30 years.

The SMRT method starts with listed sample and then injects Random Digit Dial sample (cleaned against listed) at a ratio that reflects the proportion of unlisted numbers in the market.

The sample is drawn to match the geographical distribution of Nova Scotia and was designed to complete interviews with a representative sample of 400 adult residents, 19 years of age and older. To target difficult-to-reach demographics and create a more representative distribution, probabilistic sampling was used to target Statistics Canada's Designated Areas (DAs) that have a greater-than-average likelihood of having the specified demographic (e.g., age segment). Probabilistic sampling reduces the degree of weighting needed.

The data was subsequently weighted to ensure the final sample was even closer to the province's adult population (19+) distribution.

4.3 Survey Administration

The survey was conducted by telephone from call centre facilities in Windsor, Nova Scotia between October 23 and October 28, 2009. All interviewing was conducted by fully-trained (Marketing Research Association Professional Interviewer Training Program) and supervised interviewers. At a minimum, 5 percent of calls were validated randomly through telephone and visual monitoring with at least 75% of each of these interviews listened to.

4.4 Completion results

The rate of response for the survey was 15 percent. The response rate is calculated as the number of cooperative contacts (426) divided by the total number of eligible numbers attempted (2881). The final disposition of all telephone numbers called is shown below in accordance with the Marketing Intelligence and Research Association's *Empirical Method of Response Rate Calculation Formula*.

A (1-14)	Total Attempted	2977
1	Not in service	37
2	Fax	27
3	Invalid #/Wrong#	32
B (4-14)	Total Eligible	2881
4	Busy	5
5	Answering machine	575
6	No answer	6
7	Language barrier	38
8	Ill/Incapable	0
9	Eligible not available/Callback	1417
C (10-14)	Total Asked	840
10	Household/Company Refusal	0
11	Respondent Refusal	177
12	Qualified Termination	237
D (13-14)	Co-operative Contact	426
13	Not Qualified	25
14	Completed Interview	401
	REFUSAL RATE	49%
	(10+11+12) / C	
	RESPONSE RATE	15%
	D (13-14) / B (4-14)	

4.5 Sampling Error

As with any quantitative study, the data reported in this research are subject to **sampling error**, which can be defined as the likely range of difference between the reported results and the results that would have been obtained had we been able to interview *everyone* in the relevant population. Sampling error decreases as the size of the sample increases and as the percentage giving a particular answer moves toward unanimity. At the 95% confidence level, “worst-case” potential sampling error for a sample of 401 (total sample) is ± 4.9 percentage points.
