



Québec Online
Gaming Coalition

Québec

Local iGaming landscape



About this report



This poll was commissioned by the Québec Online Gaming Coalition and conducted by Mainstreet Research. It is the exclusive property of Mainstreet Research. Any reproduction, in whole or in part of this report or the data contained herein is expressly prohibited without written authorization by Mainstreet Research.

METHODOLOGY OF MAINSTREET RESEARCH

The analysis in this report is based on results of a survey conducted from Thursday, September 21st to Monday, October 2nd, 2023, among a sample of 1010 adult players, 18 years of age or older, living in Québec. The survey was conducted using automated telephone interviews (Smart IVR). Respondents were interviewed on landlines and cellular phones. The margin of error for the poll is +/- 3.1% at the 95% confidence level. Margins of error are higher in each subsample. Totals may not add up 100% due to rounding.

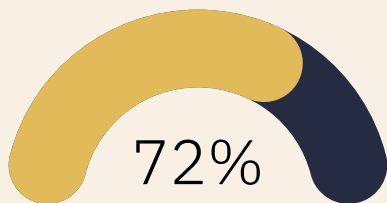
ABOUT THE QOGC

The Québec Online Gaming Coalition (QOGC) is an industry-led organization that brings together the leading online gaming operators. Our members offer a variety of services, from sports betting to online casinos, and have several programs in place to promote a responsible and safe gaming environment.

Where players play

ESPACE JEUX: A DIGITAL STOREFRONT FOR LOTTERY TICKETS

Among the 1,010 Québec players surveyed, **more than half** said they use the Loto-Québec platform, Espace Jeux, to take advantage of the many products offered, such as sports betting, online casinos and lottery sales.



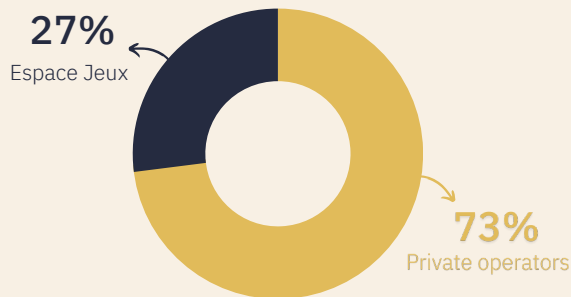
However, a closer look at the habits of Québec players using the Loto-Québec platform reveals that **72% of them visit Espace Jeux exclusively to buy lottery.**



Where players play

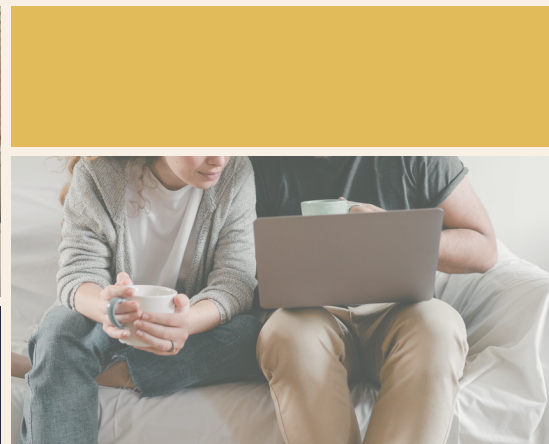
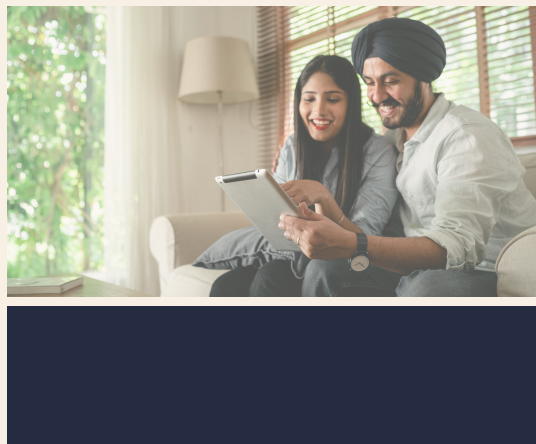
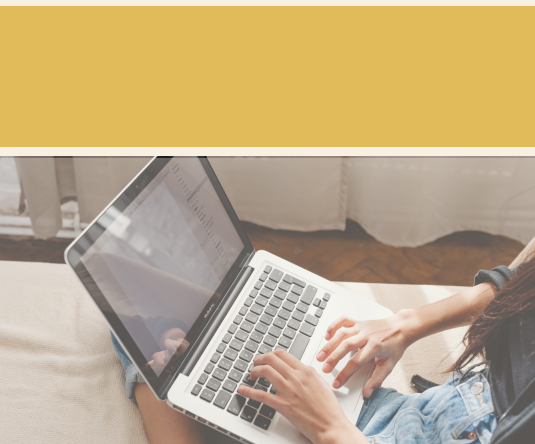


WHAT DOES THE MARKET LOOK LIKE?



When we exclude Québec players who use the platforms to buy lottery, **only 26.6%** of them visit Loto-Québec's Espace Jeux for online gaming.

Loto-Québec's monopoly is non-existent. **Nearly 3 out of 4 Québec players** choose private operators platforms to play.





Strong support for regulation

A CLEAR LACK OF CONFIDENCE

Although Loto-Québec is today the only legal entity authorized to offer online gaming to Québec consumers, other companies on the market are offering similar products.



When asked about this, **69% (nearly 7 out of 10 players) have no confidence** in the Québec government's ability to block these other sites from operating in the province.

A REGULATED SOLUTION

However, several countries and provinces have already implemented solutions to remedy this situation. In Ontario, for example, the government has chosen to implement a licensing system to regulate private online gaming operators, enabling the government to collect taxes and enforce responsible gaming practices.

67%

Such a licensing system to regulate private online gaming operators does not exist in Québec, but **67%** of Québec players would be in favor of it.

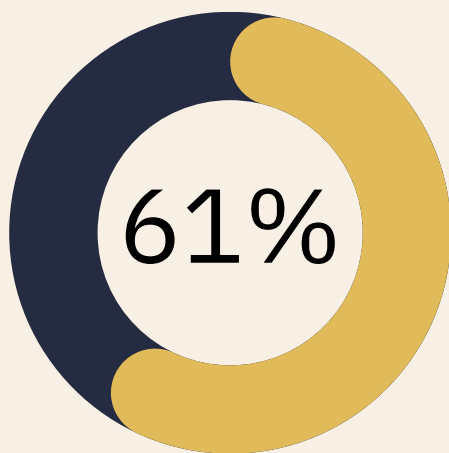


An independent body for all

ESTABLISHING STANDARDIZED CONTROLS AND OVERSIGHT OVER LOTO-QUÉBEC

More than **half**

of Québec players (56%) agree that **the creation of an independent regulatory body** that would establish standardized controls on the entire gaming offer in Quebec, including Loto-Québec, would provide greater supervision over access to gaming for minors and vulnerable players.



As for where the revenues generated by the licensing and tax system should go, 61% of Québec players believe that it should **help fund social responsibility and responsible gaming programs in Québec**, such as addiction and prevention.



Québec wins

with responsible regulation



Québec Online
Gaming Coalition

