

# Annual Satisfaction Surveys

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2022 Summary



# Annual Satisfaction Surveys

Each year, six annual satisfaction surveys are conducted throughout February and March to gauge the public’s understanding of the gaming, liquor, and cannabis industries in Alberta as well as AGLC’s performance in serving Albertans. An independent market and social research firm, Advanis, administered and analyzed the surveys on behalf of AGLC and report that the survey methodology is robust and statistically significant. The surveys provide results for performance measures that are published in AGLC’s annual report and associated business plan.

## Surveys and objectives

Survey of Albertans (phone & web)	Charitable gaming licensees	Gaming retailers	Liquor licensees and registered liquor agencies	Cannabis licensees	
<b>Objectives</b>					
Tracks Albertans’ level of satisfaction with how the legal gaming, liquor and cannabis business is run in Alberta, as well as the awareness level of responsible gambling, drinking and cannabis use.  Reviews Albertans’ confidence that AGLC responsibly manages gaming, liquor and cannabis revenues to deliver benefits to Albertans.  Tracks Albertans’ perceptions of AGLC.	Determines the incidence of Albertans who gamble and drink alcohol responsibly.  Assess Albertans’ awareness of harm reduction programs related to gambling and drinking.  Collects data to build a structure of what is considered responsible cannabis use; this data is used to develop programs to promote responsible cannabis use.	Measures levels of satisfaction with services provided by AGLC to charitable gaming licensees.	Measures levels of satisfaction with services provided by AGLC to gaming retailers, which includes licensed premises with VLTs, casinos and lottery ticket retailers.	Measures levels of satisfaction with services provided by AGLC to liquor licensees and registered liquor agencies which includes licensing, product and pricing, and customs and excise programs.	Measures levels of satisfaction of the services provided by AGLC to cannabis licensees which includes account representatives, cannabis call centre, albertacannabis.org and delivery services.

## Methodology summary

	1. Survey of Albertans (phone) <sup>1</sup>	2. Survey of Albertans (web) <sup>1</sup>	3. Charitable gaming licensees	4. Gaming retailers	5. Liquor licensees and registered liquor agencies	6. Cannabis licensees
<b>Timing (2021)</b>	Feb. 9 – Mar. 16	Feb. 9 – Mar. 16	Feb. 10 – Mar. 31	Feb. 10 – Mar. 31	Feb. 10 – Mar. 31	Feb. 11 – Mar. 31
<b>Sample size</b>	1,106 <sup>2</sup>	1,750 <sup>2</sup>	783 (1,130 in 2021)	1,463 (1,199 in 2021)	1,780 (1,532 in 2021)	376 (328 in 2021)
<b>Total invited</b>			2,032	3,604 vlts: 775 Casino: 28 Ticket: 2,801	9,603 Licenses: 8,813 Agencies: 790	817
<b>Average duration (in minutes)</b>	15 (14 in 2021)	8 (Web new to 2022)	3 (2 in 2021)	6 (7 in 2021)	5 (7 in 2021)	4 (5 in 2021)
<b>Total questions</b>	53 (58 in 2021)	66 (Web new to 2022)	8 (8 in 2021)	20 (20 in 2021)	29 (35 in 2021)	15 (16 in 2021)
<b>% Participated</b>	12% (21% in 2021)	29% (21% in 2021)	39% (39% in 2021)	41% (33% in 2021)	19% (16% in 2021)	46% (56% in 2021)
<b>Method</b>	Random Digit Dialing <sup>3</sup> (including cell phone numbers, consisting of Alberta residents)	Random Digit Dialing <sup>3</sup> (including cell phone numbers, consisting of Alberta residents)	Online Survey (phone follow up)	Online Survey (phone follow up)	Online Survey (phone follow up)	Online Survey (phone follow up)
<b>Margin of error</b>	95% confidence level +/- 3.0%	95% confidence level +/- 2.3%	95% confidence level +/- 3.5%	95% confidence level +/- 2.6%	95% confidence level +/- 2.3%	95% confidence level +/- 3.7%

### Limitations

<sup>1</sup>Questions pertaining to Key Performance Indicators were administered via telephone survey to ensure comparability to historical results and performance targets. To alleviate time on the phone and to move into a more web-based approach, all other non-KPI measures from the Survey of Albertans (combined with the Social Responsibility Survey) were moved to be collected online. To manage the length of the online survey, respondents are randomly assigned to one of three survey versions. Social Responsibility survey has been merged into the Survey of Albertans for the 2022 Annual Surveys.

<sup>2</sup>Quotas were established to ensure a good distribution across age, gender, and location within the province. The 2022 sample was weighted to match the population distribution based on the most recent census data available from Statistics Canada, established in 2016. Four extra samples were taken for both surveys. As they got to the end of the quota for the Survey of Albertans four extras were complete, thus adding the same to the Social Responsibility Survey to keep everything consistent.

<sup>3</sup>Advanis utilized a Random Digit Dialing (RDD) methodology to sample among the population of Alberta for the purpose of this research. Although RDD is considered the most effective way to achieve a sample that is representative of the population, it also has some limitations:

- Due to the sensitivity of the topics covered in the questionnaire, respondents may be influenced through Social Desirability Bias - that is, incidences of responsible gambling and alcohol usage is self-reported, and respondents tend to answer in such a way that makes them look favourable to the interviewer. As such, it is possible that the incidence of alcohol or gambling abuse is under-reported. The impact of Social Desirability Bias in survey responses is not measurable.
- While Albertans were contacted in a randomized manner, only those who agreed to participate in the survey are included in the sample. Among those Albertans contacted 12% (Survey of Albertans (phone)) and 29% (Survey of Albertans (web)) took part in the research.

## Methodology details

### **Responsible gamblers**

The responsible gamblers calculation is completed by Advanis using responses to the following questions in the Social Responsibility Survey that are based on the Centre for Addiction and Mental Health's Problem Gambling Severity Index (PGSI):

*Thinking of the last 12 months:*

- *Have you bet more than you could really afford to lose?*
- *Have you needed to gamble with larger amounts of money to get the same feeling of excitement?*
- *Have you gone back on another day to try to win back the money you lost?*
- *Have you borrowed money or sold anything to gamble?*
- *Have you felt that you might have a problem with gambling?*
- *Has gambling caused you any health problems, including stress or anxiety?*
- *Have people criticized your betting or told you that you had a gambling problem, whether or not you thought it was true?*
- *Has your gambling caused any financial problems for you or your household?*
- *Have you felt guilty about the way you gamble or what happens when you gamble?*

The answers for each question are totalled to provide an overall score. The higher the score the greater the risk that gambling is a problem. Answers are coded on a scale of zero (respondent never engages in specified behaviour) to three (respondent always engages). Respondents are considered to gamble responsibly if their overall score is two or less.

### **Responsible drinkers**

The responsible drinkers calculation is completed by Advanis using responses to the following questions in the Social Responsibility Survey that are based on Canada's Low-Risk Alcohol Drinking Guidelines developed by the College of Family Physicians of Canada and the Canadian Centre on Substance Abuse:

- *Do you drink beer, wine, coolers, or other alcoholic beverages?*

If answered yes:

- *On average, how many days per week do you drink alcohol? And "on a typical day, how many drinks do you consume?"*

Respondents are considered to consume alcohol responsibly if they meet the following criteria:

- Female: two or less drinks per day, or 10 or less drinks per week (calculated by multiplying the number of drinks per day, by the number of days per week on which alcohol is consumed).
- Male: three or less drinks per day, or 15 or less drinks per week (calculated by multiplying the number of drinks per day, by the number of days per week on which alcohol is consumed).

### ***Stakeholder satisfaction index***

The stakeholder satisfaction index is calculated by AGLC and is determined using an average of the satisfied responses from a series of questions asked in the surveys of charitable gaming licensees, gaming retailers, liquor licensees and registered liquor agencies, and cannabis licensees. The questions are focused on satisfaction related to response time, knowledge of employees, courtesy of employees, access to information, online services, ease of access to services, contact frequency, training materials and overall service.

### ***Reputation index***

The reputation index is calculated by averaging six separate dimensions (emotional appeal, financial performance, vision and leadership, workplace, social responsibility, and products and services), each comprised of questions directed to Albertans, AGLC employees and AGLC stakeholders based on trust, confidence, responsibility, and satisfaction. The employee engagement metric used within the calculation is based on questions in AGLC's employee engagement survey (note: 2018 survey results are most recent results available).