

ONLINE GAMBLING

WHEN THE REALITY
OF THE VIRTUAL CATCHES UP WITH US

REPORT OF THE WORKING GROUP ON ONLINE GAMBLING

Québec 



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MESSAGE FROM THE CHAIR





MESSAGE FROM THE CHAIR

In July 2010, the Working Group on Online Gambling received a mandate to examine the consequences of the launching by Loto-Québec of the Espacejeux online gambling website. This report and the five recommendations in it are the outcome of its deliberations.

In the fall of 2010, it became obvious to the Working Group that with the Internet, certain controls and regulations that had served Québec well in respect of land-based gambling had become obsolete and could not work in the same manner on the Internet. For 40 years, through Loto-Québec's standards of integrity, Quebecers have had the assurance that gambling has been managed in such a way that all of the participants have an equal chance to win whether they purchase lottery tickets, visit a casino or gamble on VLT machines. From the standpoint of responsible gambling, several measures have been adopted to remind clients not to exceed their limits. The profits that Loto-Québec's operations generate are paid into the public treasury for the benefit of everyone. We have no choice but to observe that certain parameters of integrity, responsibility and return to the government must be modified in respect of online gambling. A considerable portion of our work was devoted to consulting, reading, documenting and analyzing the facts to find how to respond to the new conditions found on the Internet. For the sake of the common good, we had to find solutions that protect the public. Accordingly, regardless of their form, the security and integrity of online gambling offerings should be assured and an oversight mechanism should ensure the return to the community of profits. Preventive measures and curative services aimed at online gamblers should also be available to protect the most vulnerable among them. This report proposes solutions to the new situation.

Our mandate also included a section to respond to concerns over pathological gambling. As the reader will note, individuals who are suffering from a gambling-related disorder display considerable psychological distress, in particular because compulsive gambling is often preceded or followed by other mental disorders. Such individuals hesitate to seek help, although Québec has one of the best service

networks among the countries and regions that we visited. That being said, the frequency in Québec of pathological gambling is fairly low compared with other mental disorders. Nearly one person in 20 in Québec displays a mood disorder (various forms of depression) and four out of 100 are struggling with some form of anxiety.¹ An estimated 5% of the population displays alcohol-related disorders. In 2012, 0.4%, i.e. four individuals out of 1000, were suffering from probable pathological gambling. All of these cases are tragic but gambling-related disorders are not frequent in the population compared with other mental health problems.

The key threat as regards gambling is neither an online gambling epidemic nor a pathological gambling epidemic but the stigmatization of compulsive gambling. Since Aristotle, the notion of despoiling the most vulnerable members of society has been perceived to run counter to the common good. The smooth functioning of society demands of individuals that they control their urges. Depending on the period, individuals who relinquished their freedom to alcohol, drugs and gambling have been regarded as immoral. Lastly, the three monotheistic religions judge poorly individuals who enrich themselves without working. When such a cultural and religious heritage holds sway, it is understandably shameful to admit to be a pathological gambler. If it is possible to re-establish oneself after engaging in compulsive gambling, it is less obvious that individuals can overcome the scornful glances of others.

Lastly, the facts presented in this report indicate the urgency of modifying our prevention messages. To this end, it would be useful to have concrete reference points stemming from research from the standpoint of what constitutes healthy gambling habits and what constitutes at-risk gambling so that each individual can determine when gambling ceases to be a game.

¹ S. Kairouz, R. Boyer, L. Nadeau, M. Perreault and J. Fiset-Laniel (2008). *Troubles mentaux, toxicomanie et autres problèmes liés à la santé mentale chez les adultes québécois. Enquête sur la santé dans les collectivités canadiennes (cycle 1.2)*. Québec: Institut de la statistique du Québec, 67 pages. www.stat.gouv.qc.ca/statistiques/sante/etat-sante/mentale/troubles-mentaux-toxicomanie.html.

We have written this report with the next generation in mind. The new generation communicates, studies, arranges meetings and entertains itself on the Internet. If the Working Group on Online Gambling has chosen to develop a system to monitor online gambling and if the monitoring system is regarded as the legacy of the Group to the community, it is because the Internet occupies a key place in the universe of children and adolescents.


I would like to thank Raymond Bachand, who was Minister of Finance in 2010, who asked me to chair the Working Group on Online Gambling. With my consent, he assembled a group of experts, each and every one of whom contributed magnificently to this work. The Working Group also owes a debt of gratitude to the Ministère des Finances, which has supported us over the past three years: Minister Nicolas Marceau, Assistant Deputy Minister Simon Bergeron, Lucie Lépine and Denis Dufour, who had the patience to listen to us throughout the process. Without their unconditional support, we could not have pursued our deliberations with the serenity necessary to successfully fulfil our mandate.

We would also like to thank all of the individuals and organizations that agreed to meet with us. Their generous reception and the varied exchange of ideas sustained our work. Appendix 5 indicates the organizations and individuals concerned. However, we must emphasize the outstanding collaboration of Jean-Michel Costes of the Observatoire des Jeux de France and Ingo Fiedler of the University of Hamburg, who unfailingly responded to our numerous requests. Timothy Stockwell of the University of Victoria also helped us at a strategic moment.

Our immediate collaborators made all of the difference. Catherine Paradis coordinated our work over the entire period of three years. She was the soul and key person of the Working Group. Without her energy, generosity, judgment and humour, everything would have been more difficult. Lisa Tanguay was a constant presence who oversaw organization and administration. Dobah Carré, Romain Droitcourt, Daniele González-Sicilia, Philip Huntoon, Christelle Luce, Philippe Marchessault, Jacques Marcotte, Lina Mihaylova, Élyse Picard and Myriam Plourd also assisted us. All of the collaborators worked hard and well. At the very end of the project, Jocelyn Gadbois made his skills available to the Working Group at a critical moment. The Working Group wishes to express its gratitude to all of these individuals.

The Lifestyle and Addiction Research Laboratory at Concordia University, directed by Sylvia Kairouz, hosted us at no cost during the three years with our equipment, computers and the hubbub of our numerous meetings. Atila Pahlavan from Concordia University's computer services ensured that the Working Group's confidential data were securely transmitted and stored. The Fonds de recherche du Québec — Société et culture agreed to modify the original project under its grant so that the 2012 follow-up survey had a sample comparable to the one completed in 2009, for which we thank them.

With Magali Dufour, Richard Guay, Sylvia Kairouz, Jean-Marc Ménard and Catherine Paradis, we laughed, learned and worked hard. This report is the outcome of the combined efforts of an entire team that devoted its expertise, effort and heart to the fulfilment of the mandate assigned to it.



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CHAPTER 1

INTRODUCTION





CHAPTER 1

INTRODUCTION

The Internet, a global, borderless information superhighway, has upset traditional foundations and methods of functioning. Like any radical change, this upheaval has been greeted with mixed feelings. It would be useful to go back in time to note the fear that printing and the cinema engendered. Any technique that innovates so much and enhances the lives of individuals can be perceived as encompassing risks for the community, in particular that of immoderate use, which in turn leads to psychosocial problems.

Since the 1970s, gambling has developed and been marketed in an increasingly interactive, accessible manner. Anyone with Internet access and who knows how to make electronic money transfers can participate online in the same land-based games offered in casinos, bars, or the gambling rooms. It is now possible to bet from one's home at any time of the day or night with no time limits. Gamblers can now bet anywhere with a smartphone. Online gambling is thus posing new challenges from the standpoint of gambling offerings, accessibility and oversight in a borderless virtual space. The oversight and control measures that have been developed in respect of land-based gambling have become obsolete in the context of online gambling. Faced with this phenomenon, governments have observed that online gambling was a source of revenue that was eluding them. They sought solutions that would enable them to preserve the new benefits that the Internet provides and to resolve the potential problems linked to it.

Starting in 2000, the Québec government expressed concern for the legal and technical control of online gambling.² A solution was proposed 10 years later. On February 10, 2010, the government announced in the *Gazette officielle du Québec*, the development of a public offering of legal, secure online gambling administered by Loto-Québec. In the weeks that followed, the primary stakeholders concerned with the problem related to gambling in Québec publicly opposed the decision and a resistance movement took shape.³ The directors of public health in Québec's 18 health regions and several researchers and representatives from the health field believed that the broadening of the government-controlled gambling offer to the Internet, which marked an increase in the gambling offerings available to Quebecers,⁴ would lead to an increase in the number of online gamblers and gamblers displaying gambling-related problems. Raymonde Saint-Germain, Ombudsman of Québec, shared this opinion and wrote to the Minister of Finance to inform him accordingly.

² Hearings on the management of the social and economic repercussions stemming from gambling in accordance with the *Act respecting the accountability of deputy ministers and chief executive officers of public bodies (2000)*. *Journal des débats de la Commission permanente de l'administration publique*, September 14, Vol. 36, No. 29: 29-30. Consulted at www.assnat.qc.ca/fr/travaux-parlementaires/commissions/cap-36-1/journal-debats/CAP-000914.html#debut-journal.

³ K. Lévesque (2011). "Jeu en ligne : Le comité de suivi aura un budget de 1,1 million pour trois ans" in *Le Devoir*, January 15. Consulted at www.ledevoir.com/societe/actualites-en-societe/314786/jeu-en-ligne-le-comite-de-suivi-aura-un-budget-de-1-1-million-pour-trois-ans.

⁴ R. Maguire, D. Aubin, F. Desbiens, G.W. Grenier, L. Soulière, R. Lessard, ..., S. Déry (2010). *Mémoire de la position des directeurs régionaux de santé publique sur l'étatisation des jeux d'argent par Internet au Québec*, March 16. Consulted on www.dspq.qc.ca/documents/MemoirepositiondesDSP2010031.pdf. The full text appears in Appendix 2.

Loto-Québec and the Minister of Finance offered a different perspective of the situation. They presented Espacejeux as a solution that would thwart illegal, unsecured online gambling offerings already accessible to Quebecers, keep a significant portion of this money in Québec and return all of its profits to the community.⁵

It is in this context that Minister of Finance Raymond Bachand announced the creation of the Working Group on Online Gambling to closely monitor Loto-Québec's new activities in the online gambling sector.

1. MANDATE

Louise Nadeau, Chair of the Working Group on Online Gambling, accepted the following mandate:

- analyze the social impact of the development of online gambling in Québec.

More specifically, the mandate of the Working Group on Online Gambling can be broken down as follows:

- examine the social impact by monitoring the prevalence of gambling and gambling-related problems (characteristics of gamblers, gambling habits, comorbidity, e.g. gambling and drug addiction, gambling and alcohol, and so on);
 - examine the evolution of the overall online gambling offerings;
 - examine the efficacy of the prevention measures implemented to oversee online gambling;
 - conduct the necessary consultations with experts at home and abroad.
- analyze regulatory, technical, economic and legal measures in order to counter illegal gambling.

2. BACKGROUND

A population-based survey was conducted among a representative sample of 11 888 Quebecers in the summer of 2009. The prevalence rate of gambling in the Québec population is well documented as are the different types of gamblers (low-risk, moderate-risk, probable pathological). We also knew that 1.4% of the Québec population gambled online during the 12 preceding months in 2009 and that 6% of gamblers were probable pathological gamblers. The baseline level, such as the valid data on online gambling practices prior to the introduction of Espacejeux, is known. The 2009

research project included a follow-up study. Changes in online gambling among Quebecers could thus be examined with the same protocol as in 2009.⁶ This marked an excellent beginning.

From the very first meetings of the Working Group on Online Gambling it was readily apparent to us that two competing positions were clashing and creating tension in the milieu concerned with gambling. An analysis of the comments formulated by the main primary stakeholders with regard to problems stemming from online gambling should make our task easier. The comments included several ways of representing the future impact of Espacejeux in Québec. In other words, the comments made included predictions on Espacejeux's impact. In scientific jargon, such predictions are hypotheses. It was sufficient for us to find a way of controlling the veracity of the numerous, competing proposals. Our work plan thus took shape.

The comments of the stakeholders in the realm of online gambling can be reduced to three hypotheses:

- First, the **sociosanitary hypothesis** posits that the creation of government-controlled online gambling offerings represents an increase in such offerings available to Quebecers that may increase at-risk behaviour and problems linked to online gambling.
- Second, the **socioeconomic hypothesis** postulates that the creation of government-sponsored online gambling offerings will lead to additional revenues and enhancements from the standpoint of responsible gambling initiatives, security and integrity of online gambling offerings.
- Third, the **legal hypothesis** posits that the creation of government-sponsored online gambling offerings will thwart illegal online gambling and thus promote the regulation and control of online gambling.

⁵ Ministère des Finances (2010). "Le gouvernement autorise la Société des loteries du Québec à offrir le jeu en ligne," press release, February 3. Consulted at www.finances.gouv.qc.ca/documents/Communiqués/fr/COMFR_20100203.pdf.

⁶ S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec - Société et culture, 49 pages.

3. MONITORING GAMBLING

The Working Group decided unanimously to focus on the facts. Certain obvious facts alone derived from quantitative and qualitative data enabled us to truly test the hypotheses. We therefore had to assemble valid, sufficient information to formulate recommendations drawn from convincing data. Accordingly, out of a concern for neutrality and objectivity in the execution of its mandate, the Working Group on Online Gambling decided to adopt a monitoring strategy. Monitoring is defined as a systematic, ongoing process to collect, analyze and interpret accurate, up-to-date, relevant information from various data sources with a view to describing and examining changes in a phenomenon over time. The monitoring plan effectively centralized the data available in order to reveal general trends concerning changes in online gambling in Québec since 2010. As we will see in the chapters that follow, our analyses enabled us to explain in detail the gambling practices of online gamblers and the environment in which they function. Moreover, it was possible to document the offerings and accessibility of online gambling websites and the preventive and curative measures intended to reduce gambling-related problems.

In the opinion of the Working Group, it is especially necessary to monitor online gambling in a context of technological innovation and the ongoing development of the virtual universe. Monitoring becomes an essential tool, a condition *sine qua non* to examine changes in a phenomenon that, more than any other, characterizes the 21st century and whose impacts remain unknown as regards the well-being of the population, especially the younger generation. The Working Group believes that this monitoring system is the legacy that it is leaving so that Québec is able to monitor and grasp the relationship between Quebecers and online gambling and the problems linked to it.

3.1 CONFIDENTIAL DATA

The Working Group's mandate called for it to examine the evolution in online gambling since December 2010. In July 2010, in order to do so, it was agreed with the Minister of Finance that the Working Group would have access to all Loto-Québec data deemed useful to ensure the full realization of its mandate. Starting in the fall of 2010, as Appendix 5 indicates, we met with Loto-Québec management to discuss procedures governing the sharing of such data.

Accordingly, for the entire duration of its mandate, the Working Group had access to all of the administrative data focusing on Quebecers' gambling practices on the Espacejeux website. The continuous data were submitted to us every three months and enabled the Working Group to quantify changes in participation and modes of gambling on the Espacejeux website over a period of three years.

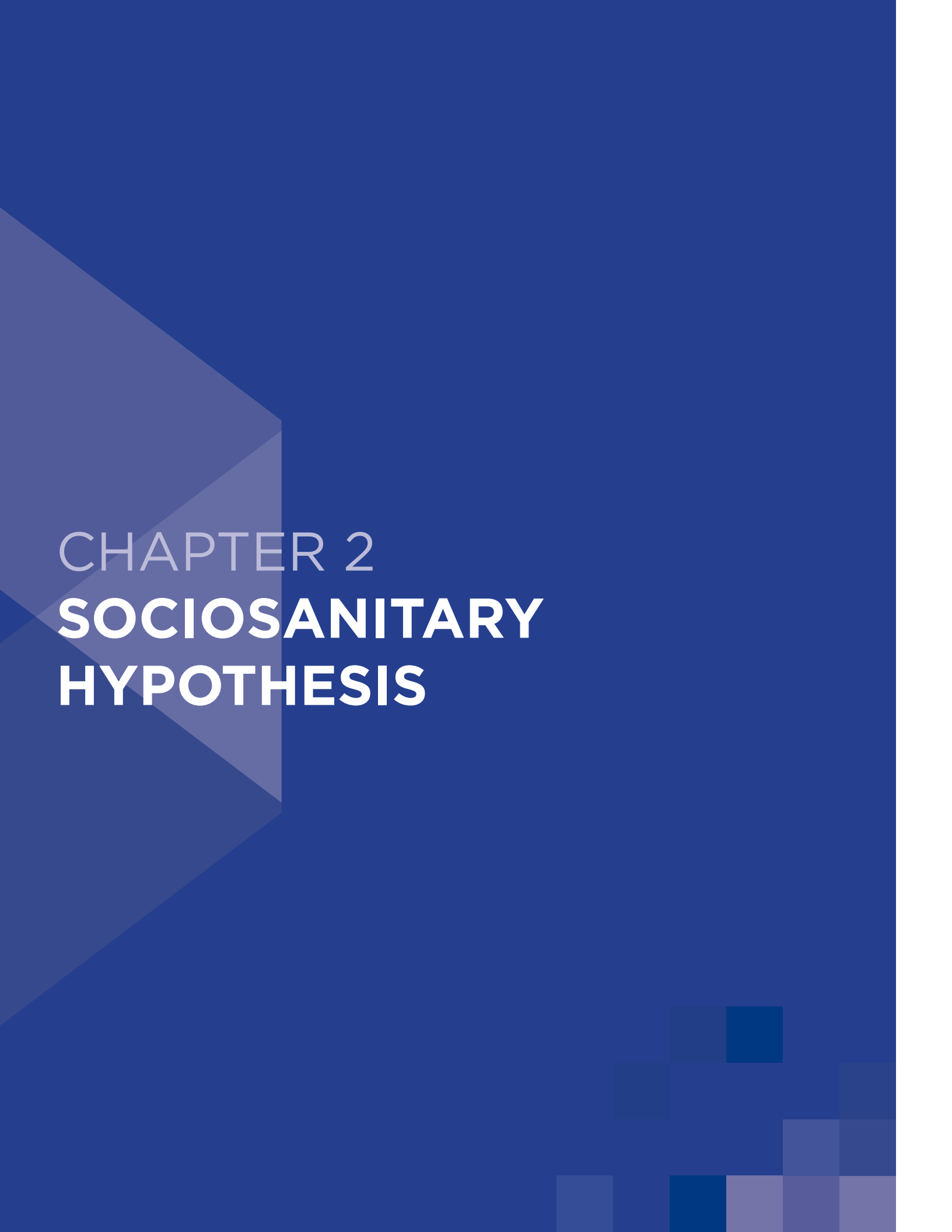
Loto-Québec in no way objected to sharing the administrative data provided that they remained confidential. A contract demanding the confidentiality of the data shared was signed by the members of the Working Group and Loto-Québec. Data focusing on the security and integrity of the Espacejeux website were subsequently also shared with the Working Group. The data significantly sustained the Working Group's reflection and were used to draft Chapters 2 and 3 and to elaborate the five recommendations in this report.

In Appendix 1 of the report, which presents the monitoring results of online gambling, all of the findings of the analysis of the confidential Loto-Québec data were withdrawn. The Working Group ensured that, despite the changes, the reader is entirely able to grasp the logic that prevailed in our analysis of the facts and the formulation of our recommendations.

4. PLAN OF THE REPORT

After the introduction, Chapters 2, 3 and 4 present the Groups's testing of the sociosanitary, socioeconomic and legal hypotheses in light of the facts reported in the monitoring system files presented in Appendix 1. Considering the global reach of the Internet, the problems stemming from online gambling impose international cooperation beyond geographic boundaries. Accordingly, we have given priority in the three chapters to the inclusion of international comparisons where possible, first and foremost with regard to an analysis of the legislative and regulatory issues. Online gambling in Québec is thus compared to such gambling in the other Canadian provinces and in other countries.

In the second part of this report, Chapter 5 presents the Working Group's five recommendations to the Ministère des Finances, followed by a brief conclusion concerning the Working Group's deliberations.



CHAPTER 2
**SOCIOSANITARY
HYPOTHESIS**



CHAPTER 2

SOCIOSANITARY HYPOTHESIS

The sociosanitary hypothesis is formulated as follows: When Loto-Québec announced the creation of Espacejeux, a government-sponsored online gambling website, public health stakeholders suggested that an increase in the gambling offerings available to Quebecers would (1) increase the number of gamblers; and (2) increase at-risk behaviour and problems linked to online gambling.⁷ The corollary of the two assumptions is the implementation of preventive measures and treatment services to thwart problems linked to online gambling.

The data that the Working Group collected show that, while in theory the public health hypothesis seemed plausible, it is not substantiated empirically. The anticipated impact of government-controlled online gambling did not materialize. There was neither an increase in the number of gamblers nor an increase in at-risk behaviour and problems linked to online gambling. As a corollary, the Working Group did not find any prevention campaign conducted by the Health and Social services Ministry (Ministère de la Santé et des Services sociaux or MSSS) focusing specifically on online gambling. Québec has a universal, quality system of assistance and support services for gamblers. On the other hand, the pathological gamblers who need such services make little use of them.

1. PARTICIPATION IN ONLINE GAMBLING

Since December 2010, a minority of Québec adults has completed the registration procedure required to participate in online gambling on the Espacejeux website (Finding SE-11.2). Furthermore, a fraction of the individuals registered are gambling online. For a number of individuals, registration on the Espacejeux website appears to stem more from curiosity than from a genuine desire to gamble online. Indeed, Loto-Québec's administrative data indicate that, on an annual basis, one-third of Québec adults registered on the Espacejeux website placed at least one bet on the site (Finding SE-11.3). Data from the 2009 population-based survey indicate that prior to the launching of Espacejeux, 1.4%

or 86 804 Québec adults participated in online gambling. According to the 2012 survey conducted using the same methodology, the proportion increased to 1.5% or 96 000 Québec adults (Finding SE-11.3, Table 11.3.1). Three years after the Espacejeux website was launched, the prevalence of gambling in the Québec population remained stable and marginal. What is more, the advent of Espacejeux was not accompanied by a rise in gambling in general. The proportion of Quebecers who said they had engaged in at least one form of gambling in the 12 months preceding the survey, whether online gambling or land-based gambling, declined between 2009 and 2012, from 70.5% to 65.7%.⁸ With these numbers in mind, it is essential to draw an initial conclusion: the launching of Espacejeux website has not affected the proportion of Quebecers who gamble.

1.1 PARTICIPATION BY MINORS IN ONLINE GAMBLING

The data currently available do not allow us to conclude whether or not the government-controlled online gambling offering has fostered participation by minors in online gambling. However, we do know that, as early as 2008, the proportion of minors who reported they gambled online was larger than the proportions reported by adults in 2009 and 2012. Indeed, in 2008, 4.9% of secondary school students indicated that they engaged in online betting and 5% said they had played online poker (Finding SS-2.1). Of course, it is always unwise to predict the behaviour of future adults by their behaviour as adolescents, but it remains that, according to the studies consulted, a bigger fraction of adolescents, compared with adults, is familiar with online gambling in Québec.

⁷ See Appendix 2 for the text of the directors of public health.

⁸ S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

In short, it should be noted that since 2010, there has been no increase in participation in online gambling. Although the participation rate among minors is higher, it is impossible to ascertain whether this is a transitional phenomenon due to the transition from childhood to adulthood.

2. GAMBLING PRACTICES OF ONLINE GAMBLERS

As Espacejeux's administrative data, the population-based data and data from the follow-up study conducted among online gamblers (Appendix 3: Follow-up Survey) reveal, when Quebecers gamble online, whether on Espacejeux or other websites, they gamble, for only brief periods and spend little money: not long and not much.

Over an observation period of 27 months, the median⁹ number of days per month with at least one bet on Espacejeux, whether on casino games, poker, sports betting or the lottery, remained stable (Finding SS-3.1). Nonetheless, with the passing periods, the median number of hours spent each month on casino games on Espacejeux increased (Finding SS-3.2). The same scenario holds for the median amount of money spent on Espacejeux on casino games, poker, sports betting and the lottery. The monthly amount has increased since the website was launched (Finding SS-3.3).

What is more, if we examine the spending of gamblers on the Espacejeux website in the 99th percentile,¹⁰ we note values in the 99th percentile that are high (Finding SS-3.3). Such gamblers are very rare and account for few cases in a million. We must, therefore, bear in mind that a very small number of individuals gamble big amounts. This observation reflects the findings of other researchers i.e. 10% of gamblers account for 91% of online gambling revenues and 1% of gamblers account for 60% of revenues.¹¹ However, administrative data do not allow us to establish whether they display gambling problems.

Otherwise, the population-based data from the ENHJEU Québec 2012 survey confirm the moderate nature of the online gambling behaviour of adult Québec gamblers. In this group, depending on the type of gambling activity, the median number of online gambling episodes is 1.7 times per month (Finding SS-3.1, Table 3.1.8) and the median of the

number of hours spent on an online gambling website is two hours per month (Finding SS-3.2, Table 3.2.4). The median amount spent on online casino games¹² is \$4 per month (Finding SS-3.3, Table 3.3.8) and the medians of online sports betting, online poker and cyberlotteries are all \$17 per month. Information sheets SS-3.1 to SS-3.3 indicate that compared with the 2009 survey, the median of the number of online gambling episodes increased slightly (from 0.4 to 1.7) but that the median of the number of hours spent on an online gambling website remained stable and the median of the amount spent on online poker fell slightly (from \$20 to \$17).

The follow-up survey of online gamblers conducted in the winter of 2013 reveals that the majority of gamblers gamble online less than once a week ($n = 39/56$) and devote less than five hours a week to such gambling ($43/56$).¹³ In a word, none of the data collected suggests that, when the entire population of Québec serves as a reference, gamblers who gamble online spend excessive amounts. To the contrary, Quebecers devote relatively little of their money and time to this activity.

Moreover, it would be ill-advised for us to draw conclusions on changes in the impact of online gambling by neglecting to consider the land-based gambling practices of online gamblers. Indeed, we must not overlook that "exclusive" online gamblers do not exist. In the two population-based surveys in 2009 and 2012, virtually all of the online gamblers (109/111 in 2009; 146/159 in 2012) reported that they also participated in land-based activities.¹⁴ It is unrealistic to pose the problem of online gambling in isolation. An analysis of data from the 2012 survey reveals that, when all gambling activities are considered, the gambling profile of online gamblers is more worrisome. Accordingly, among online gamblers, the median of annual spending on online table games, online poker, online sports betting and cyberlotteries stands at \$300. Among the same gamblers, the median of annual spending on gambling in general is \$1 385,¹⁵ a significant difference.

⁹ The median is the midpoint of a frequency distribution and divides the data into two equal parts. Intuitively, it can be said that the median is the midpoint of the whole. When there are extreme values, such as for investment data, where a few gamblers invest huge sums, this measurement better reflects reality.

¹⁰ The 99th percentile corresponds to the expenditure starting at which we find the 1% of online gamblers who spend the most.

¹¹ I. Fiedler (2012). "The gambling habits of online poker players" in *The Journal of Gambling Business and Economics*, 6, 1-23. DOI:10.2139/ssrn.1908161.

¹² Online casino games include all table games but exclude slot machines.

¹³ Appendix 3 presents the follow-up survey.

¹⁴ S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

¹⁵ *Ibid.*

GAMBLING HABITS OF QUÉBEC ADULTS

The population-based survey reveals that in 2012, 66.6% of Québec adults stated that they had engaged in betting or spent money on gambling during the 12 months preceding the survey. The most common activities include the lottery (60.6%), slot machines (9.7%), poker (4.3%) and VLT machines (4.1%). According to self-reported information, the median of annual spending on gambling is estimated at \$40 for Quebecers overall and \$150 for current gamblers (those who have gambled during the preceding year).

The breakdown of the population indicates that 33.5% of adults are non-gamblers (either lifetime or in the 12 preceding months), 61.8% are problem-free gamblers, 2.9% are gamblers at low risk of developing a gambling problem, 1.4% are deemed to be at moderate risk, and 0.4% are probable pathological gamblers.

The proportion of gamblers at moderate risk or probable pathological gamblers is higher among men and individuals who stem from disadvantaged backgrounds (limited education, low income, unemployed).

As for the problems linked to gambling, among the gamblers, 23% smoke regularly, 13% engage in at-risk alcohol use, 6% present a possible dependence on alcohol, and 12% consumed cannabis during the 12 preceding months.

Between 2009 and 2012, we note a slight reduction in the proportion of Quebecers who said they had gambled during the previous year (from 70.5% to 66.6%) but an increase in the prevalence of casino gambling (from 10.3% to 13.5%). On the other hand, the prevalence of most games (bingo, VLT machines, slot machines, online games) remained stable. As for the seriousness of gambling-related problems, there is no statistically significant difference between 2009 and 2012, neither in respect of the prevalence of gamblers at moderate risk nor as regards probable pathological gamblers.¹⁶

While it is true that, overall, online gamblers display behaviour that is more at risk than the behaviour of individuals who never bet online, it is in land-based gambling that the problems of online gamblers appear. To focus on online gambling practices to the exclusion of other gambling practices is a mistake in light of these data. The Working Group's recommendations must, therefore, take into account this observation, beyond the terms of its mandate.

3. GAMBLING PROBLEMS AMONG ONLINE GAMBLERS

In order to ascertain if placing online gambling under government control led to an increase in the number of Quebecers experiencing problem gambling, we examined two types of data, i.e. those focusing on the gambling practices of online gamblers and those focusing directly on the problem gambling of online gamblers.

The prevalence of online gambling in the Québec population stood at 1.5% in 2012. It was 1.4% in 2009 when the Espacejeux website was launched (Finding SE-11.3, Table 11.3.1). The two ENHJEU-Québec population-based surveys reveal that the number of online gamblers remains low, i.e. 111 individuals in 2009 (out of a total sample of 11 888 individuals) compared with 159 in 2012 (out of a total sample of 12 006 individuals).¹⁷

Because of the small numbers, it is impossible to separately estimate each of the proportions of gamblers at moderate risk¹⁸ and the probable pathological gamblers¹⁹ among online gamblers at the population level. Indeed, according to the statistical convention, proportions and estimates of numbers can be produced and disseminated if and only if: (1) they refer to at least 100 respondents; (2) the numerator of the proportion includes at least 10 respondents; and (3) the coefficient of variation is less than 33.3%. All of these criteria were not met in 2009 and in 2012. In 2009, among the 111 online gamblers who participated in the survey, there were fewer than 10 gamblers at moderate risk. As for probable pathological gamblers, the survey counted fewer than 10 in 2009 and in 2012. The small number of participants in the sub-sample of online gamblers does not enable us to generalize this finding to the population overall. The proportions of online gamblers at moderate risk and of probable pathological gamblers are so small that the data are unusable.

¹⁶ S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

¹⁷ *Ibid.*

¹⁸ Gamblers who may or may not have suffered the negative consequences of gambling.

¹⁹ Gamblers who have suffered the negative consequences of their gambling and may have lost control of their behaviour. See also J. Ferris and H. Wynne (2001). *L'indice canadien du jeu excessif*. Consulted at www.ccsa.ca/2003%20and%20earlier%20CCSA%20Documents/ccsa-010082-2001.pdf.

With regard to potentially addictive behaviour, ENHJEU-Québec's population-based data indicate that in 2009 38.2% of online gamblers reported problem alcohol use. In 2012, the proportion was 21.4% (Finding SS-5.1, Table 5.1.1). In 2009, 32.9% of online gamblers reported cannabis consumption and 34.1% in 2012 (Finding SS-5.2, Table 5.2.1). As for regular tobacco consumption, the figures were 26.1% in 2009 and 24.1% in 2012 (Finding SS-5.3, Table 5.3.1). In 2009, 27.8% of online gamblers reported problems with friends, family, finances or justice linked to gambling. In 2012, the proportion stood at 20.5% (Finding SS-5.4, Table 5.4.1). The rates are higher, above all in respect of probable alcohol dependence and cannabis use, than those noted among gamblers in general (see the box entitled "Gambling habits of Québec adults").

The respondents in the 2012 population-based survey also had to mention if they were experiencing a physical or mental health problem. Among online gamblers, 4.5% responded in the affirmative (Finding SS-5.5, Table 5.5.1).

The data collected by the monitoring system show that the launching of Espacejeux was not accompanied by an increase in participation in online gambling or the intensification of online gambling practices. On online gambling websites, on average, Québec adults seldom gamble, gamble briefly and spend little. Given the higher gambling rate among minors, we cannot exclude that the younger generation will adopt in the future online gambling practices at higher risk.

Furthermore, the launching of Espacejeux has not been linked to a statistically significant increase in the proportion of online gamblers at moderate risk and potentially pathological gamblers. However, we must bear in mind that the numbers were very small. Lastly, online gamblers display greater numbers of other forms of addictive behaviour than gamblers in general.

4. COROLLARIES

The first corollary to the sociosanitary hypothesis is the implementation of preventive and curative measures to thwart at-risk behaviour, problems linked to online gambling and gambling-related disorders. The MSSS has a mandate to ensure the prevention of pathological gambling, crisis intervention, the treatment of pathological gamblers, research and evaluation.²⁰ Loto-Québec remits each year to the MSSS \$22 million to enable the latter to fulfil its mandate concerning the implementation of the measures outlined in the *Plan d'action gouvernemental sur le jeu pathologique*.

4.1 PREVENTION CAMPAIGNS

4.1.1 Campaigns aimed at adults

In the realm of prevention, between 2010 and 2013, the MSSS, with an annual budget of just over \$1 million (Activity SS-1.2, Table 1.2.1), implemented seven gambling-related campaigns aimed at Québec adults, i.e. two in 2010, three in 2011, one in 2012 and one in 2013. Three of the campaigns targeted the Aboriginal population, two were aimed at at-risk gamblers and the people around them, and the other two targeted the general population (Activity SS-1.1, Table 1.1.). No campaign focused specifically on online gambling. The prevention campaigns were advertised on television, in particular at peak viewing times.

The MSSS media campaign hinged on a communication strategy centred on loss, the "mother" of all consequences, which affects both gamblers and the people around them.²¹ The messages, which were intended to exploit a strong emotional dimension and create maximum impact,²² included an accusation of guilt and shame concerning gamblers described as being solely responsible for these social problems.

²⁰ Ministère de la Santé et des Services sociaux and Table de concertation interministérielle sur le jeu pathologique (2002). *Agir ensemble. Plan d'action gouvernemental sur le jeu pathologique 2002-2005*. Consulted at publications.msss.gouv.qc.ca/acrobat/f/documentation/2002/02-837-21.pdf.

²¹ MSSS media plan concerning information and awareness campaigns, "Campagne Jeu excessif — Volet population générale." Document submitted by email to the Working Group on February 28, 2013.

²² *Ibid.*

The campaigns were evaluated and the MSSS shared the findings with us. The survey conducted by SOM on the notoriety of the MSSS's 2012 "gambling" campaign and its impact on the public's perception of gambling revealed the following results.²³ To the question: "In your opinion, what percentage of Québec's population is experiencing problems related to compulsive gambling?" [OUR TRANSLATION] only 7% of the respondents gave the right answer, "less than 2%." The other responses can be broken down as follows:

In your opinion, what percentage of Québec's population is experiencing problems related to compulsive gambling?	
2% or less	7%
Between 3% and 5%	15%
Between 6% and 10%	16%
Between 11% and 20%	19%
Between 21% and 30%	13%
Between 31% and 50%	14%
More than 50%	8%
Don't know/no answer	8%

Source : SOM recherche et sondage. *Étude de postcampagne sur les jeux de hasard et d'argent*. Rapport SOM-r, March 2012 edition (third wave). Submitted to the Ministère de la Santé et des Services sociaux, April 2012.

It should be noted that 8% of the respondents believed that over 50% of Quebecers were experiencing problems related to compulsive gambling. The findings are in all respects comparable to those that Ipsos obtained in 2011 in a survey on Quebecers' perception of gambling-related problems conducted on behalf of the Fondation Mise sur toi. However, the rate of probable pathological gamblers in 2012 was 0.4%,²⁴ i.e. four probable cases per 1000 inhabitants.

When respondents in the SOM survey had to spontaneously indicate to what they attributed this opinion, one respondent in five (21%) mentioned the sale of lottery products and the presence of many people in the casinos. A similar proportion (19%) of the respondents answered that they knew people with gambling-related problems and 14% said that they had heard about such people through the media, friends, and so on. In the survey conducted by Ipsos, the respondents who answered "10% or more pathological gamblers in the population" had to indicate to what they attributed this opinion. The most frequent response, given by 12% of the respondents, was the media (newcasts, newspapers, television).

In the prevention campaigns, the only social representation of gambling was one of compulsive gambling linked to its harmful consequences: they hammered home the message of the deleterious effects of gambling by showing gambling-related social dramas. Moreover, the viewer might infer that compulsive gambling was widespread in Québec since it was the only model that the campaigns proposed. The two surveys, which were conducted independently, show that the objective was attained. One participant in a discussion group organized on behalf of the Fondation Mise sur toi clearly summarized the attitudes that the campaigns provoked: "It must be very serious for the government to invest so much money to denounce such appalling situations."²⁵

Of course, the alarming tone of the campaigns on gambling has softened considerably over the years, but the campaigns only target 2% of the population. What is more, they only describe behaviour and harmful consequences that are criteria in respect to gambling-related disorders. According to the population-based data, a Quebecer must rarely miss a friend's birthday to gamble, one of the images presented by the MSSS in its 2013 campaign. We can infer that the televised messages hinged on the notion that the representation of bad, harmful behaviour followed by social opprobrium has a deterrent effect. This is the notion that punishment or the anticipation of punishment has a deterrent effect.²⁶ In fact, it has been empirically shown that punishment can stop a behaviour in the short term but that it has consequences, in particular to induce secrecy, flight and avoidance, and more rigid behaviour.²⁷

²³ SOM recherche et sondage. *Étude de postcampagne sur les jeux de hasard et d'argent*. Rapport SOM-r, March 2012 edition (third wave).

²⁴ S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec – Société et culture, 49 pages.

²⁵ Ipsos on behalf of Mise sur toi (June 2010). *Étude sur les habitudes et attitudes à l'égard du jeu*. Unpublished document.

²⁶ This conception of the individual creates a stalemate on recent data that show that individuals are influenced by their environment but also influence the environment. Research stemming from the models proposed by Bandura and Mischel propose an image that is rather remote from that proposed by Skinner, although the latter noted throughout his research the ineffective nature of punishment: "The image is that of a human being skilled at solving problems, capable of profitably employing a vast range of experiences and cognitive skills, endowed with considerable potential to accomplish good and evil, actively constructing his psychological universe, affecting his environment but influence by it according to precise rules." See also W. Mischel (1976). *Introduction to Personality*. Holt McDougal, page 253.

²⁷ P.D. Balsam and A.S. Bondy (1983). "The negative side effects of reward" in *Applied Behavior Analysis*, 16 (3): 283-296.

By comparison, it has been a long time since advertising has been presented at peak viewing times showing individuals who are dependent on alcohol neglect their children, lie, deprive their loved ones of their essential property or cause their loved ones considerable grief. Whether for the purpose of prevention or to encourage requests for help, the messages avoid taxing heavy drinkers with shame by describing them as being responsible for the social problems linked to alcohol abuse. Moreover, the pioneers of the alcohol disease model were aware that, when confronted with an alcoholic person contending with an impression of failure and a deeply felt loss of inner freedom linked to his alcohol consumption, the hope of possible change is the only message that must be given.²⁸ As for prevention, strategies pertaining to gambling must target the entire population, more specifically gamblers at risk, and must rely, as is the case for alcohol, on empirical approaches and not on moral standards. With 0.4% of probable pathological gamblers, prevention strategies must be focused on the other 99% of the Québec population. The messages must target their at-risk gambling practices.

It must be said in the MSSS's defence that it is not easy, given the current state of knowledge, to engage in primary, constructive, educative prevention. To date, for want of convincing research in this respect, it is impossible to propose a limit on gambling that experts or researchers would deem to be at low risk. Such data do not exist. If prevention agencies wish to disseminate constructive, effective messages, it is necessary to pursue research in this realm. A genuine culture of moderation in gambling does not exist. It remains to be elaborated based on evidence.

We must emphasize that the MSSS's media plans indicate that the prevention campaigns must "directly counterbalance advertising and television programs focusing on the promotion of gambling."²⁹ Consequently, it would have been useful for the monitoring system to engage in a follow-up with respect to the promotion of online gambling on the Internet, including Espacejeux's promotions and advertising. Such follow-up has proven to be impossible, in particular because of the numerous algorithms that enable search engines to function and respond in a personalized way to net surfers' situations and needs. Such monitoring has yet to be undertaken.

4.1.2 Campaigns aimed at young people

During drug addiction prevention week, the third week of November, the MSSS launches a "universal, targeted prevention program focusing on addictive behaviour." Such prevention programs target the promotion of healthy lifestyles and all potentially addictive behaviour. The MSSS encourages young people³⁰ to examine differently their personal and social skills, get involved in their communities, discover their passions, and perceive differently ways of protecting themselves from the risks linked to the consumption of alcohol or other drugs. The campaigns are accessible throughout Québec.

The monitoring system did not find any program that specifically targets online gambling by young people.

According to the Working Group, the decision to propose to young people "universal, targeted prevention programs focusing on addictive behaviour" is excellent insofar as the data indicate that the at-risk behaviour of young people is multivariate.³¹ Furthermore, the penetration level of the programs is not known.

4.2 LOTO-QUÉBEC AND THE CREATION OF THE OFFICE OF THE VICE PRESIDENT FOR RESPONSIBLE GAMBLING

During our mandate and until 2012, the Fondation Mise sur toi, which is legally independent and financially supported by Loto-Québec, adopted as its mission population-based prevention pertaining to gambling in Québec. Population-based prevention includes primary prevention, which seeks to support low-risk gambling practices in the entire population and secondary prevention, which seeks to eliminate or reduce at-risk behaviour in respect of compulsive gambling among low- and moderate-risk gamblers in the general population. In 2011, the Fondation Mise sur toi produced a publication on online gambling entitled "Le jeu en ligne: savoir pour choisir," to inform the public of the characteristics of online gambling, the risks linked to it and advice to minimize the risk of developing a gambling problem. The publication was available on the Fondation Mise sur toi website and printed copies were available free of charge upon request.

²⁸ All of the documentation of the past 10 years confirms this observation.

²⁹ Ministère de la Santé et des Services sociaux and Table de concertation interministérielle sur le jeu pathologique, *op. cit.*

³⁰ The tools that the MSSS is developing for young people target three age groups: 10 to 12 year olds, 13 to 16 year olds and 17 to 24 year olds.

³¹ M. Laventure, K. Boisvert, and T. Besnard (2010). "Programmes de prévention universelle et ciblée de la toxicomanie à l'adolescence. Recension des facteurs prédictifs de l'efficacité" in *Drogues, santé et société*, 9 (1): 121-164.

In November 2012, Loto-Québec took over the mandate of the Fondation Mise sur toi in order “to do better.”³² The Office of the Vice President for Responsible Gambling was established at that time. Its mandate includes, in particular: (1) the “production and distribution of information and material to heighten awareness of the risks linked to gambling and strategies to avoid losing control over one’s gambling habits;” and (2) “the implementation of measures aimed at limiting the adverse consequences of compulsive gambling.”³³

In the spring of 2014, an examination of the Loto-Québec website devoted to social responsibility did not reveal any information or awareness-raising document devoted to gambling, including the brochure “Le jeu en ligne: savoir pour choisir.”

It must be clear that the population targeted by Loto-Québec is solely its own customers, to whom it must offer responsible gambling. The government corporation’s preventive measures should not target the general population. During its consultations and other deliberations, the Working Group noted that there are agencies independent of online gambling operators that are specifically responsible for engaging in prevention with respect to gambling in the population, such agencies no longer exist in Québec. In British Columbia, the Gaming Policy and Enforcement Branch is responsible for regulating gambling and managing the responsible gambling strategy and, indeed, for prevention programs focusing on gambling-related problems. In Ontario, the Responsible Gambling Council, an independent, non-profit organization, is responsible for the prevention of problem gambling. In Finland, the Finnish Foundation for Gaming Research engages in research and prevention. In France, the Observatoire des jeux is responsible for research and the Institut national de prévention et d’éducation pour la santé, for the prevention of gambling problems. In Sweden, Svenska Spel, the government gambling corporation, limits its mandate to offering its clients responsible gambling tools. The Working Group disagrees with the government corporation’s decision to grant itself a mandate to prevent gambling problems aimed at the general population.

According to the Working Group, Loto-Québec does not clearly distinguish between “the responsible management of gambling offerings” and “population-based prevention of gambling problems.” In the pursuit of its mission, Loto-Québec’s strategic direction is clear with respect to the responsible management of gambling offerings: the target group is its clientele. However, prevention programs aimed at the population of Québec demand expertise that lies outside the competence of Loto-Québec since it is incompatible with its commercial mission. Indeed, Loto-Québec is a commercial government corporation under the responsibility of the Minister of Finance. It is true that Loto-Québec is seeking

to strike a balance between its economic mission and its social responsibility mission. However, in 2012, the Québec Government Budget demanded an increase in profits from \$50 million in 2013-2014 to \$90 million in 2014-2015 from Loto-Québec. There is incompatibility and a conflict of interest between, on the one hand, preventive measures aimed at the population, which, if they are effective, should lead to a reduction in certain gambling practices and, on the other hand, an increase in the dividends paid to the government.

The Working Group believes that Loto-Québec should concentrate on managing its gambling offerings in a responsible manner with its clients, as stated in its mission. The population-based prevention of gambling problems should, on the other hand, be assigned to an independent organization. While the image may be striking, Dracula cannot be asked to guard the blood bank.

What is more, the Working Group has taken the liberty of reconceptualising the social responsibility of the government corporation. From the standpoint of its institutional competence, just as Loto-Québec has a business intelligence service to guide its commercial operations, it is possible to imagine the government corporation establishing a social responsibility intelligence service to enhance its responsible management. The establishment of Espacejeux led to the production of a real-time administrative data file of all of the website’s customers. The database—the Working Group knows this because it used it for more than two years—transforms gambling data into information that can be used to develop secure, responsible gambling. By taking advantage of data that it already has in hand, Loto-Québec could be sure with greater confidence of offering its clientele entertaining games while limiting the risk of a loss of control among the most vulnerable gamblers. In other words, Loto-Québec’s administrative databases on its customers’ gambling have the unique potential to be converted into information that can be used to develop secure, responsible gambling and the prevention of gambling problems. As a matter of fact, it would be possible for Loto-Québec to develop, under the aegis of the Office of the Vice President for Responsible Gambling, a social responsibility intelligence service with a mandate to use customer gambling data (land-based and online gambling) to promote the advancement of knowledge in the realm of the responsible management of gambling offerings.

The social responsibility intelligence service could underpin the establishment of an Administrative Data Observatory dedicated to the advancement of knowledge within the International Association of Government Corporations responsible for gambling offerings. As its name indicates, the Observatory could have a mandate to analyze administrative

³² Interview granted to Paul Arcand by Gérard Bibeau, President and CEO of Loto-Québec on January 24, 2013 on the program “Puisqu’il faut se lever.” Consulted at www.985fm.ca/audioplayer.php?mp3=161342.

³³ “A game should remain a game” (our commitment). Consulted at www.lejeudoitrestreterunjeu.com/a-propos-de-nous-/notre-engagement.

gambling data from Loto-Québec and other government gambling corporations, in partnership with independent researchers, to promote the development of best practices in the secondary prevention of gambling problems. Loto-Québec could, in this regard, show leadership at the international level in the realm of social responsibility intelligence among government gambling corporations.

Our discussions with certain managers of such corporations suggests that if one of them were to take the initiative and establish an Administrative Data Observatory devoted to the advancement of knowledge in the realm of responsible gambling, certain corporations might invest in the project. Such a social responsibility initiative, based on a rigorous, innovative, thorough analysis of the customers' gambling data would be useful and would certainly more closely correspond to Loto-Québec's mission than prevention aimed at the general population.

4.3 THE ASSISTANCE AND SUPPORT NETWORK FOR GAMBLERS

Aside from prevention strategies, measures are carried out in respect of individuals suffering from gambling problems or gambling-related disorders. Since 2001, the MSSS has established, or consolidated, a number of assistance and support services for gamblers and the people around them in each region of Québec.

4.3.1 Front-line services

For gamblers and their social network who wish to be informed and made aware of gambling-related problems, the "Gambling: Help and Referral" information, referral and support service offers this service at all times throughout Québec, by telephone, online and fax. Between 2009-2010 and 2012-2013, the number of calls decreased from 8400 to 6872 (Activity SS-2.2, Table 2.2.1).

Tracking and early intervention services are also offered in Québec's health and social services centres. We were unable to obtain data on the level of penetration of such services among gamblers. On the other hand, we do know that such services have been targeted by the province-wide dependency training program established in 2010-2011 in all regions of Québec, a program that has, in particular, focused on gambling-related problems.

Mutual-aid groups for gamblers are available weekly in virtually all regions of Québec, with the exception of the Nord-du-Québec, Bas-Saint-Laurent and Gaspésie and Îles-de-la-Madeleine regions (Activity SS-2.6, Table 2.6.1).

4.3.2 Treatment for gambling-related disorders

The dependency rehabilitation centres offer services free of charge in all regions of Québec. Accommodation and rehabilitation support services are also accessible in most regions of Québec. In a sample of 1084 gamblers receiving treatment in dependency rehabilitation centres in 2012-2013 for whom a specialized assessment was conducted, 7.1% of them displayed a disorder stemming from online gambling. Depending on the region, this proportion ranged from 2.5% (Laval) to 15.4% (Estrie) (Activity SS-2.8, Table 2.8.1).

4.3.3 Treatment elsewhere in the world

The Working Group's consultations in other Canadian provinces, Sweden, the United Kingdom and France, and discussions with colleagues in the European Community revealed that, compared with other jurisdictions, services in Québec pertaining to gambling-related problems, both land-based and online, are universal, accessible and varied. Furthermore, stakeholders have been trained by the Centre québécois d'excellence pour la prévention et le traitement du jeu at Université Laval, whose founder, Professor Robert Ladouceur, is a pioneer in the treatment of gamblers struggling with gambling-related disorders. The universality and quality of the top-notch service network is the envy of a number of other countries.

Several studies report that individuals suffering from a gambling-related disorder rarely resort to treatment services,³⁴ in particular when use of such services is compared with that of individuals displaying other mental problems or substance-abuse problems (alcohol, illicit drugs). In Québec, pathological gamblers also find it difficult to seek help.³⁵ In a study devoted to individuals who committed suicide, the pathological gamblers relied to a significantly lesser extent on health and social services overall than the other individuals. Of the 49 suicides, only one pathological gambler had sought psychotherapy.

4.3.4 Possible reasons for the limited use of services

This section presents four reasons that may explain why Québec gamblers rely to a lesser extent on assistance and treatment services for gambling-related disorders than other individuals suffering from a mental disorder.

³⁴ S. Gainsbury, N. Hing, and N. Suhonen (2013). "Professional help-seeking for gambling problems: Awareness, barriers and motivators for treatment" in *Journal of Gambling Studies*, March, DOI: 10.1007/s10899-013-9373-x.
W.S. Slutske (2006). "Natural recovery and treatment-seeking in pathological gambling: results of two U.S. National Surveys" in *American Journal of Psychiatry*, 163(2): 297-302.
H. Suurvali, J. Cordingley, D.C. Hodgins, and J. Cunningham (2009). "Barriers to seeking help for gambling problems: A review of the empirical literature" in *Journal of Gambling Studies*, 25, 407-424, DOI: 10.1007/s10899-009-9129-9.
H. Suurvali, D. C. Hodgins, T. Toneatto, and J. A. Cunningham (2012). Motivators for seeking gambling-related treatment among Ontario problem gamblers. *Journal of Gambling Studies*, 28(2): 273-296. DOI: 10.1007/s10899-009-92268-7.

³⁵ M. Séguin, R. Boyer, A. Lesage, A. McGirr, A. Suissa, M. Tousignant, and G. Turecki (2010). "Suicide and gambling: Psychopathology and treatment-seeking" in *Psychology of Addictive Behaviors*, 24(3): 541-547, DOI: 10.1037/a0019041.
H. Simoneau, É. Contant, and M. Chauvet (2012). *Obstacles au traitement du jeu pathologique dans la région des Laurentides*. Les Rapports de recherche de l'Institut. Montréal: Institut universitaire sur les dépendances du Centre Dollard-Cormier.

4.3.4.1 Concealment

Unlike drinkers or drug abusers, whose intoxication and psychosocial problems quickly become apparent to their families, friends and employers, pathological gamblers endeavour to hide their gambling habits through lying or other means. Some people become aware of a loved one's pathological gambling, in particular a spouse, a child or an employer, when the gambler's huge losses are revealed. This difficulty, which occurs among many distressed individuals and consists in not wanting or being unable to express their thoughts and feelings, not only has consequences for the loved ones but often becomes widespread in therapy in the difficulty to express oneself and commit oneself to a process of change.

4.3.4.2 The solution in compulsive gambling

Some gamblers believe that their problem is one of money rather than a pathological gambling problem. Since the financial problem is emphasized, they believe that the solution to their many problems lies in their winnings. Gambling is thus perceived as the solution rather than the problem. This paradox is partially accurate: winning would make it possible to repay the debts if and only if the gambler does not gamble his winnings. The notion of starting all over again is at the heart of the gambler's erroneous beliefs.³⁶

4.3.4.3 Stigmatization

The history of gambling is inextricably linked to that of its regulation by society and such regulation is made necessary by the risks of the deleterious effects linked to compulsive gambling. Morality and religion have, at least since we have reliable sources, largely guided control over gambling practices. It was, therefore, necessary to "harness" gambling because of the pleasure and excesses to which it could give rise.³⁷ Consequently, compulsive gambling became taboo and compulsive gamblers often felt shame, which is an obstacle to seeking help.

Québec has tackled and resolved other taboos. For a long time, compared with men, women who were dependent on alcohol, drugs or both were under-represented in treatment centres. Today, and such is not always the case in other countries, women are no longer under-represented in the network because of a collective decision by stakeholders in the assistance network in the 1980s to tackle the sexist system based on a double standard which made women alcoholics and drug addicts more unworthy than men. Moreover, we have collectively reduced suicide rates, which are more or less comparable to the rates for gambling-related disorders. Campaigns in the schools, colleges and universities and awareness-raising in the entire population to combat silence and prejudice and understand psychological distress combined have changed Quebecers' attitudes and behaviour. In addition, to avoid a spillover effect, experts obtained the collaboration of the media when they asked them to display greater sensitivity when publishing news of a suicide. Suicide rates are now lower in Québec than a decade ago, in particular among young adolescents.

4.3.4.4 Gambling-related disorders rarely occur alone

Gambling-related disorders rarely occur alone. The data on comorbidity are well established, whether in the general population or in clinical studies. The findings indicate that a significant proportion of pathological gamblers are complex cases whose clinical presentation demands the ability to detect, assess and treat comorbid mental health disorders. These comorbid mental health disorders are of different kinds and demand that treatment services for gamblers offer programs and qualified staff to receive them and implement a treatment plan that is best adapted to the clinical presentation.

The MSSS has already developed a cross-training program for all front-line and second-line stakeholders in Québec or in order to pinpoint in mental health services users struggling with dependency and, in dependency services, users contending with mental health problems. It remains to ascertain whether such training will contribute to the necessary changes in practices to better respond to the varied, complex needs of these clientele.

³⁶ E. Bergler (1985). *The Psychology of Gambling*. International University Press, Inc. Original edition: Hill and Wang, 1957.
E. Langer (1975). The illusion of control. *Journal of Personality and Social Psychology*, 32(2): 311-328. DOI: 10.1037/0022-3514.32.2.311.
A. Letarte, R. Ladouceur, and M. Mayrand (1986). Primary and secondary illusory control and risk-taking in gambling (roulette). *Psychological Report*, 58(1): 299-302. DOI: 10.2466/pr01986.581.299.

³⁷ L. Nadeau and M. Valleur (2014). *Pascasius ou comment comprendre les addictions*, followed by *Traité sur le jeu* (1561), translated and annotated by J.-F. Cottier, Montréal: Presses de l'Université de Montréal.

While questions pertaining to comorbid mental health disorders have been a priority for almost two decades in the health and social services network, programs in the network of dependency rehabilitation centres or in the mental health services network that have specialized in these complex cases are rare. The evaluation of the MSSS's 2005-2010 mental health action plan notes that only one-third of Québec's regions offer services adapted to the clientele displaying comorbid disorders, while another one-third is organizing services and the remaining third is experiencing shortcomings in the organization of mental health and dependency services.³⁸ What is more, we have to admit that, while psychotherapy is accessible in the public network, the waiting lists are long. As for private practice, the fees of psychotherapists and psychologists are high for bankrupt individuals and therefore impossible to assume. Lastly, the legacy of guilt linked to gambling perpetuates stigmatization. In the study conducted in the Laurentides region, the slogan deemed most likely to encourage gamblers to seek assistance within the framework of the Québec study on obstacles to treatment was "To seek assistance is a win-win deal!", a message of hope.³⁹

All of us, individuals, decision-makers, health professionals, researchers, clinicians, journalists, educators, gamblers and industry personnel, must rethink our attitudes toward individuals struggling with gambling-related problems so that seeking assistance becomes the normal course of action and the hope of improving oneself becomes the norm.

5. CONCLUSION

The data that the Working Group collected show that, while in theory the public health hypothesis seemed plausible, it has not been verified empirically. The anticipated impact the government-controlled gambling offering did not materialize. There was neither an increase in the number of gamblers nor an increase in at-risk behaviour and problems linked to online gambling.

From the standpoint of prevention, the only preventive measure aimed at online gambling was developed by the Fondation Mise sur toi in the form of a document entitled "Le jeu en ligne : savoir pour choisir." We were unable to locate the document on the website of Loto-Québec, which took over from the foundation in 2012. In addition, the Working Group questioned the validity of the government corporation's decision to assume the primary and secondary prevention mandate. Elsewhere in the world, it is common to assign a population-based prevention mandate to an independent foundation.

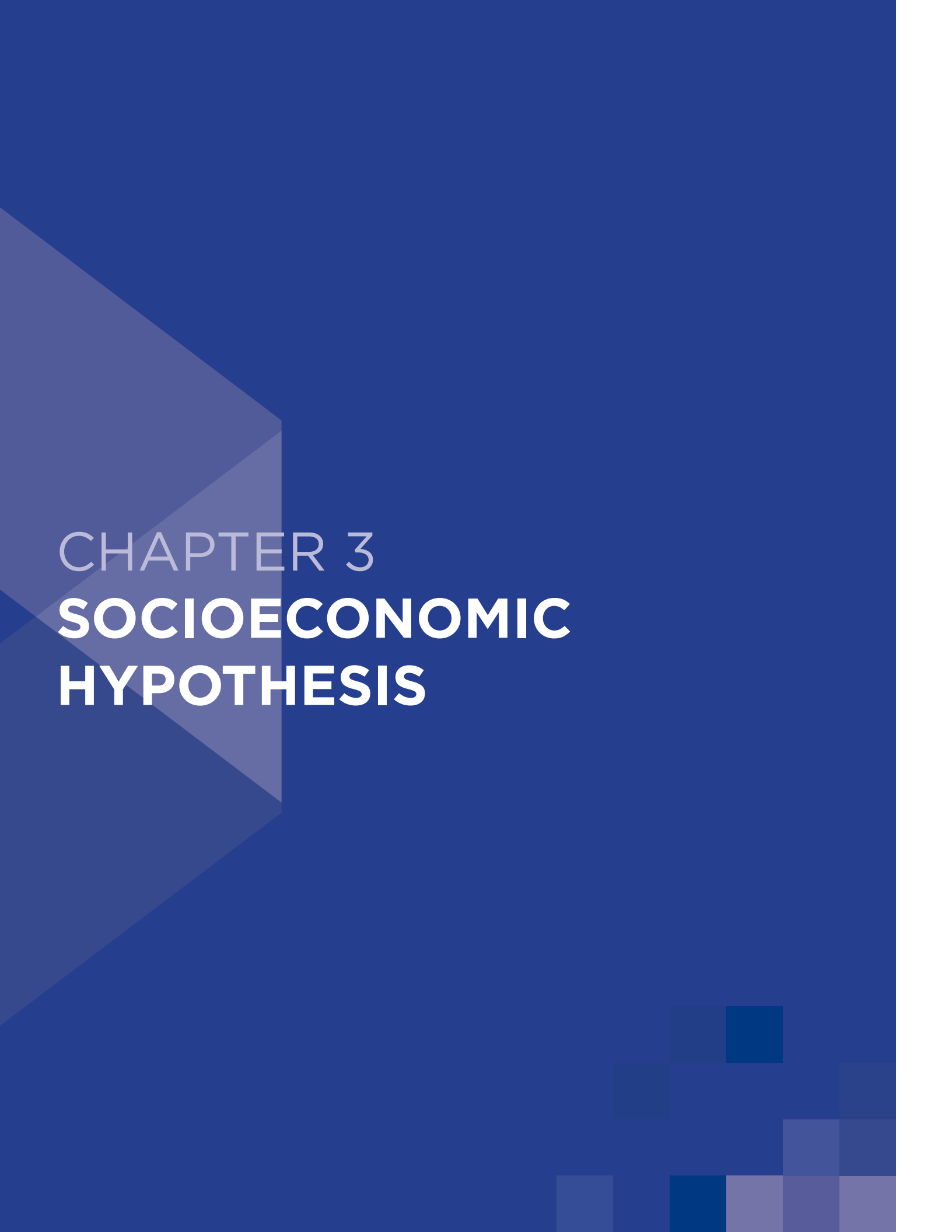
The Working Group believes that Loto-Québec's mission is to maintain its competence in the realm of responsible gambling and even to broaden such competence through an examination of its administrative databases. It believes that neither primary nor secondary prevention fall under the mandate and the jurisdiction of the government corporation, whose main vocation is commercial.

While the Working Group is highly critical of the MSSS's prevention programs for adults that focus messages for the general public on the deleterious impacts of compulsive gambling, it acknowledges a lack of data on low-risk gambling practices that might underpin constructive prevention programs. What is more, the notion of proposing universal, targeted programs to prevent addictive behaviour aimed at young people seems worthwhile, although the level of penetration of such programs has not been assessed.

The accessibility of the gambling assistance and support network, including the "Gambling: Help and Referral" line, is a strong point in Québec, in particular in comparison with other regions or countries. However, it would be advisable to evaluate the efficacy of various programs. Gamblers struggling with a gambling-related disorder resort less extensively to services than individuals contending with a mental disorder or an alcohol- or drug-related disorder. The obstacles to treatment are inseparable, on the one hand, from concealment and the comorbidity that characterize the clinical presentation of the gambling-related disorder and, on the other hand, the stigmatization of gambling that persists in society. Québec has tackled and resolved other taboos at least as resistant to change as the stigmatization linked to gambling.

³⁸ Ministère de la Santé et des Services sociaux (2012). *Évaluation de l'implantation du Plan d'action en santé mentale 2005-2010 : La force des liens*. Québec: Direction des communications, Ministère de la Santé et des Services sociaux, 63 pages.

³⁹ H. Simoneau, É. Contant, and M. Chauvet (2012). *Obstacles au traitement du jeu pathologique dans la région des Laurentides*. Les Rapports de recherche de l'Institut. Montréal: Centre de réadaptation en dépendance de Montréal-Institut universitaire.



CHAPTER 3
**SOCIOECONOMIC
HYPOTHESIS**



CHAPTER 3

SOCIOECONOMIC HYPOTHESIS

The socioeconomic hypothesis is formulated as follows: When Loto-Québec announced the establishment of a government-controlled online gambling website (Espacejeux), it was suggested that the creation of the website would have three consequences: (1) channel online gambling offerings into a controlled network; (2) ensure the security and integrity of the online gambling offerings available to Quebecers; and (3) ensure that Quebecers have access to responsible gambling offerings.⁴⁰

Three years later, the data do not corroborate the predictions of the socioeconomic hypothesis. Loto-Québec's arrival on the Internet did not fully channel illicit gambling offerings in a controlled network. Moreover, although Loto-Québec's gambling offerings appear to be secure and honest, certain limitations have been noted with respect to responsible gambling. The Working Group believes that it is inadequate, because Loto-Québec regulates itself, that it manages alone the assurance and control measures pertaining to the conformity of gambling from the standpoint of security, integrity and responsibility. This procedure does not conform to the best control practices observed in other jurisdictions.

1. CHANNELING OF GAMBLING OFFERINGS

We have two indicators of the channeling of gambling offerings. The first one pertains to the revenues that Espacejeux generates, while the second one estimates the level of participation by Québec's population in the Espacejeux website.

1.1 REVENUES OF ESPACEJEUX

Since the Espacejeux website went online, revenues from the website rose from \$20 491 000 in 2011-2012 to \$31 591 257 in 2012-2013 (Finding SE-11.1, Table 11.1.1). We note during this period the diversification of the games and types of activities that the website offers.

Another solid indicator of the channeling of online gambling offerings is the change in the profits of the Espacejeux website during the same periods. Loto-Québec did not agree to reveal the figures to the Working Group because the government corporation does not wish to reveal its cost structure. Without Espacejeux's cost structure it is difficult to ascertain whether the government corporation's website has generated profits.

1.2 PARTICIPATION IN GAMBLING ON ESPACEJEUX AND OTHER WEBSITES

In the three months following the launch of the website, an extremely small minority of Quebecers had registered on the Espacejeux website and the proportion of Quebecers who registered in the subsequent six-month periods fell even more (Finding SE-11.2). All told, in March 2013, very few Québec adults were registered on the Espacejeux website. As for the proportion of gamblers who placed at least one bet on Espacejeux, the data indicate that it is extremely small but that it increased slightly between the first and the last quarter of observation (Finding SE-11.3). It should be noted that the prevalence of online gamblers in Québec, which also includes betting on websites deemed illegal, was estimated at 1.4% in 2009 and 1.5% in 2012.

⁴⁰ Ministère des Finances (2010). "Le gouvernement autorise la Société des loteries du Québec à offrir le jeu en ligne," press release, February 3. Consulted at www.finances.gouv.qc.ca/documents/Communiqués/fr/COMFR_20100203.pdf.

Furthermore, a study by the University of Hamburg devoted, in particular, to a geographic analysis of gamblers on major international poker websites (PokerStars, Full Tilt Poker, Everest Poker, IPN and Cake Poker) estimates that in 2009, 1% of Canadians and 0.95% of Quebecers played online poker on such an deemed illegal online poker website.⁴¹

The 2012 population-based survey reveals that, among Québec adults who reported gambling online, 22% of the gamblers said they did so exclusively on the Espacejeux website and 78% gambled at least once on a website deemed illegal.⁴² It is thus estimated that 1.2% of the population gambled on an website deemed illegal in 2012, compared with 1.4% in 2009⁴³ before the Espacejeux website opened (Finding SE-10.1, Table 10.11).

This finding is corroborated by the responses of 58 online gamblers who participated in a study on online gambling.⁴⁴ One of the questions in this follow-up study enabled the respondents to spontaneously name the website(s) that they visited most often to gamble online. The majority (46/58) said they most often visited online gambling websites such as PokerStars, Full Tilt and 20-odd other sites.⁴⁵

It should be noted that when the government corporation announced that it was going online, Quebecers had access to over 2000 online gambling websites. Over the past three years, the situation has remained unchanged. It is possible to conclude that in 2013 the websites deemed illegal are still highly visible and very popular with Quebecers. The possible reasons for such popularity will be discussed later in this chapter.

1.2.1 Possible reasons for Quebecers' choices

This section presents three reasons that may explain why Québec gamblers continue to gamble on websites other than Espacejeux.

1.2.1.1 Quebecers' ignorance of the legality of online gambling websites

The first reason why a number of online gamblers in Québec bet more on websites other than Espacejeux appears to be that Quebecers are unaware that the websites are deemed illegal. Since 2010, Loto-Québec advertisements have indicated that Espacejeux is the only legal online gambling website in Québec, but no campaign has specifically, clearly warned Québec gamblers of the illegal nature of the other websites. As proof, when the respondents to the follow-up survey on online gambling had to answer the question: "Are you aware that in Québec the only legal online gambling offering is that of Loto-Québec's Espacejeux and that the other online gambling websites are deemed illegal?", more than half of the respondents (37/64) admitted that they did not know it (Appendix 3).

What is more, we note the penetration in Québec of advertising for play-money gambling websites that are deemed legal (.net). Whether on the Internet, billboards, in newspapers or on television, numerous advertisements for free online gambling are presented to Quebecers. These websites, which are subject to much advertisement and promotion are, however, linked to real-money online gambling websites, which are deemed illegal (.com). The graphic design, spokespersons and presentation of several of the free money websites are remarkably similar between the ".net" and ".com" websites.

It is likely that the similarity between the play-money and real-money gambling websites helps to create the impression that certain websites are legal. It may be difficult if not impossible for Québec gamblers to know whether the websites with betting in real money (.com) are deemed or illegal. Indeed, they are regularly exposed to advertising for the play-money online gambling websites that promote gambling in general and the promotion of trademarks linked to websites deemed illegal.

⁴¹ The University of Hamburg team is currently analyzing a second wave of data collected in 2012. In an email received on December 17, 2013, Ingo Fiedler, the principal investigator, agreed to share with the Working Group the preliminary findings. According to the findings, the proportion of Canadians who in 2012 played online poker on an illegal poker network remained stable at 0.91%. Until the analyses have been completed and validated, this finding must be regarded with the utmost caution.

⁴² S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec – Société et culture, 49 pages.

⁴³ Based on statistical criteria, the difference between the two proportions is not significant. Consequently, it is not possible to conclude whether the proportion of gamblers who gamble online on non-governmental websites well and truly declined in 2012 in relation to 2009.

⁴⁴ Appendix 3 presents the study (sample, method and findings).

⁴⁵ The follow-up survey is presented in Appendix 3.

Is it possible to prohibit this form of disguised advertising for websites deemed illegal? Some observers question that play-money online gambling websites, including the advertising of such websites, are illegal. Accordingly, while the Province of Ontario, during its reflection on Bill 152 on the amendment of its *Consumer Protection Act*, contemplated legislating against advertising for play-money online gambling websites,⁴⁶ the province decided not to proceed with the measure in light of studies and legal opinions on the matter.

On the whole, unless the Québec government allocates the necessary funding and mandates an organization to develop information and awareness-raising campaigns on the legality and illegality of online gambling websites, it is unlikely that Quebecers will improve their knowledge on the legal status of online gambling offerings and be able to make enlightened choices concerning the type of gambling websites that they frequent.

1.2.1.2 Economic reasons: the case of poker

A second reason that explains why Québec gamblers continue to gamble on websites other than Espacejeux appears to be of an economic nature. As poker is the most popular of the online games, it can serve as an example. This explanation will be given by comparing Espacejeux and Svenska Spel, the government-owned website in Sweden, since when Espacejeux was launched the Swedish online gambling system was often cited as an example for the purpose of comparison both by health professionals and by Loto-Québec.

1.2.1.2.1 The saturation of the poker market

The first explanation focuses on the launching date of the Espacejeux website. The German economist Ingo Fiedler, whose research is based on a unique real-time gambling database of the world's biggest online poker websites,⁴⁷ notes that the Loto-Québec website was put into operation in December 2010, nearly five years after the Swedish website opened. In this emerging market, that marks an eternity. In other words, Sweden launched its website at a time when the online poker market was booming while the market was already saturated when Loto-Québec launched its website. Consequently, according to Fiedler,⁴⁸ it was harder for Espacejeux to attract gamblers than it was for Svenska Spel. In 2010, very few new gamblers joined the already saturated market. As for established gamblers, they probably already had a strong opinion about the best online poker websites and networks. In a word, their habits were already established.

	Svenska Spel	Espacejeux
Territory	Sweden	Québec
Population	9.1 million	8 million
Software	GTech/Boss Media	GTech/Boss Media
Open to non-residents	No	No
Pool of shared gamblers	No	No
Opening date	March 2006	December 2010
Average number of gamblers over seven days	600 to 700	90 to 175
Maximum number of gamblers	1300 to 2000	300 to 450
Commission (rake)	2.5% Maximum	3% to 5% Maximum
% of commission paid to gamblers (rake back)	No	No

Source: *Pokerscout.com*, October 4-17, 2013.

46 M.D. Lipton and K.J. Weber, *Internet Gambling Report - 12th Edition - Canada*. Consulted at gaminglawmasters.com/articles/pdfs/10_Nov_IGR-12th-edition.pdf, pages 14-15.

47 I. Fiedler and A.C. Wilcke (2011). *The Market for Online Poker*. Electronic publication. DOI: 10.2139/ssrn.1747646.

48 I. Fiedler (2011). *Comparing Poker at Espacejeux and Svenska Spel: A short note*. Unpublished document.

1.2.1.2.2 The system of commissions

According to Fiedler, a second reason relates to the system of commissions or rake.⁴⁹ Espacejeux uses a commission structure virtually identical⁵⁰ to those used overall on the poker websites in the Boss Media's International Poker Network (IPN). However, the structure makes provision for commissions higher than those that Svenska Spel collects. For example, Fiedler observed that on Espacejeux, the maximum commission rate ranges from 3% to 5%, while on Svenska Spel, the maximum rate is 2.5%. In other words, the Svenska Spel website charges less than Espacejeux does to allow its customers to play poker. This comparison reveals that poker costs more on Espacejeux, which may well contribute to the lack of appeal for Québec gamblers of the government corporation's website.

1.2.1.3 Online gambling: the compartmentalization of geographic boundaries

The meetings and consultations that the members of the Working Group conducted among experts in the virtual environment leads us to believe that the compartmentalization of the government corporation's market, in accordance with the *Criminal Code of Canada*, might explain Espacejeux's difficulty in attracting Québec gamblers who frequent websites deemed illegal and channeling, as a result, such gambling offerings.

Based on our consultations and our participation in several conventions devoted to online gambling, we note that the Loto-Québec website compartmentalizes gamblers in a relatively small environment with fixed boundaries, which does not allow the gamblers to network with other net surfers the world. The existing *Criminal Code*, which confines gambling to Canada's borders, does not allow Loto-Québec to exploit what is unique in the virtual world and which ensures that gamblers visit and return to a given website: limitless access without boundaries to other gamblers.

Moreover, such recognition of what digital culture is also enables us to grasp why, of all the traditional games that are offered online the world over, poker is by far the most popular: poker is played in a network and allows gamblers to be connected and exchange with each other wherever in the world they may be. Of course, like other online games, poker is played alone, but it is played in a state that the Swedish economist Kjell Nordström describes as a pure product of the digital revolution, that of "alone togetherness."⁵¹ Several scientists, philosophers and thinkers support this idea of new paradigm that the digital society has spawned. Online

gambling is a specific case of this sweeping change observed the world over. Ultimately, one of the reasons for which Quebecers continue to play on websites other than Loto-Québec's site is perhaps because such websites respond much better to net surfers' desires in general and of the young in particular. They undoubtedly find more gratification and pleasure on these websites.

In short, it is at once the reasons linked to the gamblers' lack of knowledge concerning the legality of websites, the economic market for poker and the compartmentalization of the geographic boundaries of gambling that apparently explains why Quebecers continue to gamble online on websites other than Loto-Québec's site.

2. THE SECURITY AND INTEGRITY OF ONLINE GAMBLING

Secondly, the socioeconomic hypothesis posits that the creation of the Espacejeux website will offer Quebecers secure, honest, responsible gambling. The following section presents the findings of the examination of the second part of this hypothesis.

2.1 SECURITY AND INTEGRITY ON ESPACEJEUX

Since the launching of the Espacejeux website, Loto-Québec has recorded the complaints lodged with the government corporation. No customer has complained because personal data entrusted to Espacejeux may have been compromised (Finding SE-6.1). Furthermore, Loto-Québec has submitted the reports to the Financial Transactions and Reports Analysis Centre of Canada (FINTRAC) because of Espacejeux customer accounts that display dubious transactions or transactions of more than \$10 000 (Finding SE-6.3). Loto-Québec has also recorded the complaints from customers who claim to be the victims of a potential criminal offence committed by a third party, e.g. collusion, fraud or theft, on Espacejeux. Among such complaints, Loto-Québec deemed one-quarter of them to be substantiated. These decisions led to the closing of a number of customer accounts. (Finding SE-6.2).

⁴⁹ The commission is the fee that an operator usually deducts from the total pool of real-money poker games up to a maximum amount set per game. The amount varies according to the bets, the number of players participating and the type of limits in the poker game.

⁵⁰ The only differences are for tables of "No Limit Hold'em Heads-Up" and those higher than "50 Big Blinds." Since such tables are not played on Espacejeux, it is possible to suggest that there is no difference between the structure of commissions on Espacejeux and that on other websites in the IPN network.

⁵¹ J. Ridderstrål and K.A. Nordström (2008). *Funky Business Forever: How to Enjoy Capitalism*. Don Mills: Pearson Education Canada (Financial Times Series).

As for problems linked to the integrity of the games on Espacejeux, complaints have been recorded since the website was launched, of which one-quarter were subject to an investigation conducted by Loto-Québec employees. The corporation concluded that a very small minority of the complaints were well-founded (Finding SE-7.1).

It should be noted that Loto-Québec collected, analyzed and assessed the justification for the complaints received without, to our knowledge, the support of an independent ombudsman, appointed by and reporting directly to the board of directors. As a result of the lack of independent analysis in the execution of these duties, it is hard for the Working Group to conclude whether, from the standpoint of the security and integrity of gambling, the government corporation is achieving the objectives that it has set for itself.

In the final analysis, even if the government corporation has adopted rules and standards respecting security and integrity, it alone ensures follow-up to them. Loto-Québec carries out the self-regulation measures governing online gambling and their implementation in a context where the government corporation also assumes a mandate centred on marketing and profitability. While none of the data presented allows us to conclude that Loto-Québec does not offer honest, secure gambling, it remains that the government corporation is self-regulating. No external monitoring and control mechanism or device exists in respect of online gambling. Consequently, the data presented earlier might be called into question by anyone interested in the topic.

In addition, in the current context characterized by the absence of the regulation and independent control of the online gambling market, no datum is available on the complaints received by deemed illegal operators concerning problems of security and integrity. This means that the entire online gambling sector remains out of control. Under the circumstances, it is impossible to ascertain whether Espacejeux is doing worse or better than other online gambling websites.

In comparison with what the Working Group observed elsewhere in Canada and in other regions of the world, Québec is noteworthy in that it is one of the rare jurisdictions (and the only one in Canada) that allows its online gambling operator to self-regulate itself with respect to security, integrity and responsible gambling. Outside Québec, the operations of government-controlled or private legal online gambling websites are mainly overseen by independent

government regulatory agencies. In Canada, in order to offer online gambling, government corporations in British Columbia and Manitoba must both operate under the aegis of their independent provincial regulatory body, the British Columbia Gaming Policy and Enforcement Branch (GPEB) and the Manitoba Gaming Control Commission. Ontario, which is about to allow its government corporation to offer online gambling also plans to empower the Alcohol and Gaming Commission of Ontario (AGCO) to regulate the new gambling offering. In France, online gambling falls under the authority of the Autorité de régulation des jeux en ligne (ARJEL). Other States that grant licences, e.g. Denmark, Italy, the United Kingdom, Australia and the state of Nevada, oblige all of their operators to satisfy the requirements of their regulatory bodies, which have legal authority over all aspects of online gambling offerings. Indeed, at the international level, regulatory bodies usually have a mandate to make sure of the integrity and compliance of online gambling and to oversee the protection of gamblers.

Secondly, the absence of an independent regulatory body creates the perception of a conflict of interest between the government corporation's regulatory responsibilities and its marketing and profitability objectives. What is more, the fact that the government corporation represents Québec in associations such as the North American Gaming Regulators Association (NAGRA) and the International Association of Gaming Regulators (IAGR) raises eyebrows among certain members of the associations. What is more surprising is that the Québec body that regulates land-based gambling, the Régie des alcools, des courses et des jeux (RACJ), does not maintain a presence in these associations.

2.2 RESPONSIBLE ONLINE GAMBLING

When Espacejeux was established, Loto-Québec displayed a willingness to comply with the best standards governing responsible gambling.⁵² To this end, the government corporation hired a consultant expert, which led to a report that Loto-Québec submitted to us.⁵³ However, the monitoring that the Working Group conducted revealed several decisions, which, over the years, have undermined the measures adopted in 2010 with respect to responsible gambling. What is more, no new responsible gambling measure has been implemented since the website was launched.

⁵² It should be noted that the efficacy of responsible gambling measures taken individually in isolation has never been demonstrated scientifically. Nonetheless, we cannot exclude that when they are implemented jointly with an array of other measures, such responsible gambling options can protect gamblers. Given the current state of knowledge, we believe that it is a constellation of regulatory measures pertaining to responsible gambling, primary and secondary prevention and treatment, which, when combined, maximize the likelihood of limited prevalence of at-risk gambling and gambling-related disorders.

Y. Khazaaal, A. Chatton, A. Bouvard, H. Khiari, S. Achab, and D. Zullino (2013). "Internet poker websites and pathological gambling prevention policy" in *Journal of Gambling Studies*, 29(1), 51-59.

S. Gainsbury and R. Wood (2011). "Internet gambling policy in critical comparative perspective: The effectiveness of existing regulatory frameworks" in *International Gambling Studies*, 11(3), 309-323.

S. Monaghan (2009). "Responsible gambling strategies for Internet gambling: The theoretical and empirical base of using pop-up messages to encourage self-awareness" in *Computers in Human Behavior*, 25(1), 202-207.

⁵³ R. Wood (2010). *Examen de la stratégie en matière de jeu responsable d'Espacejeux (Rapport final)*. Consulted at lotoquebec.com/cms/dms/Corporatif/fr/loto-quebec-et-vous/presse/communiqués-de-presse/strategie-jeu-responsable-fr/strategie-jeu-responsable-fr.pdf.

2.2.1 Responsible gambling options on the Espacejeux website

Since it was launched, Espacejeux has offered its customers several responsible gambling options adapted to online gambling, in particular:

- a clock positioned in plain sight on the entire website;
- information on the sum of money won or spent;
- once an hour, the time spent gambling is displayed;
- access by the gambler at all times to his gambling history;
- the possibility of imposing pauses in gambling or barring themselves from the website for a period of one to five months;
- the obligation for the customer to set himself a weekly deposit limit;
- the possibility of setting daily, weekly or monthly limits on expenses and gambling time.

However, in the course of our mandate, we noted a reduction in the scope of certain responsible gambling measures. This is particularly glaring with regard to the introduction of personal gambling time and spending limits. Accordingly, in March 2012, Loto-Québec management decided to modify the registration form on the Espacejeux website. Prior to that time, registration occurred in four stages: (1) identification; (2) oversight of gambling; (3) conditions; and (4) validation of identity. The second stage presented in a detailed manner three responsible gambling tools, the first of which compelled the gamblers to set for themselves a weekly deposit limit. The other two tools enabled those gamblers who so desired to determine the maximum daily, weekly or monthly gambling and expense limits, as Figure 1 indicates.

Since March 2012, registration has occurred in two stages: (1) identification; and (2) validation of identity. In this new version, the “Manage my gaming” options are less visible and not as clearly explained (see Figure 2). Consequently, since the change, the proportions of gamblers on the Espacejeux website who use the voluntary restraint systems on time and expenses have virtually been halved (Finding SE-9.1 and Finding SE-9.2).

The screenshot shows the registration form titled "INSCRIVEZ-VOUS EN 4 ÉTAPES SIMPLES". The steps are: ÉTAPE 1 Identification, ÉTAPE 2 Établir mon jeu, ÉTAPE 3 Conditions, and ÉTAPE 4 Validation d'identité. The current step is ÉTAPE 2, which includes sections for:

- Limites hebdomadaires de dépôt (Obligatoire)***: A form to set a weekly deposit limit, with a default of 500.00\$. A note states: "Cette limite est calculée du dimanche 0 h au samedi 23 h 59 min 59 s." and "Vous pouvez entrer n'importe quel nombre entier allant de 20,00 \$ à 9 999,00 \$." There is a "Modifier" link.
- Limites sur le temps joué (Facultative)**: A form to set time limits. Options include Quotidienne (2 hours), Hebdomadaire (10 hours), and Mensuelle. A note states: "À intervalles fixes, le système affiche une fenêtre du temps joué et des sommes gagnées ou dépensées. À cela, vous pouvez ajouter une option de jeu responsable en enregistrant une durée de jeu maximale. Vous pouvez modifier votre limite de temps à tout moment." and "Cette limite est calculée du dimanche 0 h au samedi 23 h 59 min 59 s." There is a "Modifier" link.
- Limites de dépenses (Facultative)**: A form to set spending limits. Options include Quotidienne (100.00\$), Hebdomadaire (200.00\$), and Mensuelle (0.00\$). A note states: "Vous avez la possibilité de limiter vos dépenses. À tout moment, votre solde ne pourra être inférieur à : votre solde de départ moins la limite de dépenses d'une période donnée." and "Par exemple, si votre solde au début de la journée est 1 000 \$ et que votre limite quotidienne est de 200 \$, votre solde ne pourra jamais être moins de 800 \$ durant la journée." and "Cette limite est calculée du dimanche 0 h au samedi 23 h 59 min 59 s." There is a "Modifier" link.

Figure 1: Screenshot of the registration form prior to March 2012

The screenshot shows the registration form titled "Informations personnelles". It includes fields for:

- Titre***: H. or Mme.
- Prénoms***: Text input.
- Nom***: Text input.
- Date de naissance***: Date picker.
- N° de téléphone principal***: Radio buttons for Cellulaire or Téléphone fixe, with a text input.
- N° de téléphone secondaire**: Radio buttons for Cellulaire or Téléphone fixe, with a text input.
- Code postal***: Text input.
- Adresse***: Text input.
- Ville***: Text input.
- Résidez-vous à cette adresse depuis plus de deux ans?***: Oui or Non.
- Courriel***: Text input.
- Réinscrivez votre courriel***: Text input.
- Langue de correspondance***: Radio buttons for Français or Anglais.
- Communication***: Oui or Non.
- Est-ce la première fois que vous jouez en ligne?**: Yes/No.
- Mon compte**:
 - Nom d'utilisateur***: Text input.
 - Mot de passe***: Text input.
 - Réinscrivez votre mot de passe***: Text input.
 - Question de sécurité***: Dropdown menu.
 - Réponse***: Text input.
- Limite de dépôt par semaine***: Text input. Note: "Veuillez fixer le montant maximal que vous pouvez déposer dans votre compte Espacejeux pendant sept jours. Vous pouvez ensuite modifier votre limite de dépôt à tout moment." and "Entrez un montant entre 20 \$ et 9 999 \$." There is a "Modifier" link.
- Limites sur le temps joué (facultative)**: Section with a minus sign (-).
- Limite de dépenses (facultative)**: Section with a minus sign (-).
- Code de promotion**: Text input. Note: "Si on vous a remis un code de promotion, veuillez l'inscrire dans le champ ci-dessous :".

Figure 2: Screenshot of the registration form after March 2012

2.2.2 The test on gambling habits on Espacejeux

Since it was launched, Espacejeux has also offered its customers a test to evaluate their gaming behaviour (Finding SE-8.4, Table 8.4.1). The test is hard to access on the website, barely advertised and poorly presented. The test itself is not validated and does not lead to specific recommendations. In addition, on the page intended for gamblers who feel the need to take a test on their gaming behaviour, the game “Poker des Caraïbes”, and its jackpot, is announced dynamically in an eye-catching display. Such a message is incompatible with the very objective of the test and the prevention measure that it represents. The Working Group finds deplorable that the advertisement for Poker des Caraïbes directly targets gamblers when they have decided to question their gaming behaviour. The hypertext link means that a simple click on the advertisement automatically takes the gamblers to the game (see Figure 3).

In July 2013, nearly one year after the establishment at Loto-Québec of the Office of the Vice President for Responsible Gambling, no harmonization existed between the headings concerning the test on gaming behaviour presented on the Espacejeux website and those available on Loto-Québec’s social responsibility website and toward which, by means of a hypertext link, a gambler who clicked on the test was automatically redirected. What is more, for several months, there was considerable confusion and indeed, incoherence, between the information presented on the two Web pages of the government corporation. In August 2013, the Working Group informed the Ministère des Finances of the situation. In response to a notice received from this Ministry, Loto-Québec remedied the situation by harmonizing the information presented on the Espacejeux website and the social responsibility website. On the other hand, in the spring of 2014, the hypertext link for the Poker des Caraïbes advertisement was still clearly visible on the left-hand side of the screen (see Figure 3).

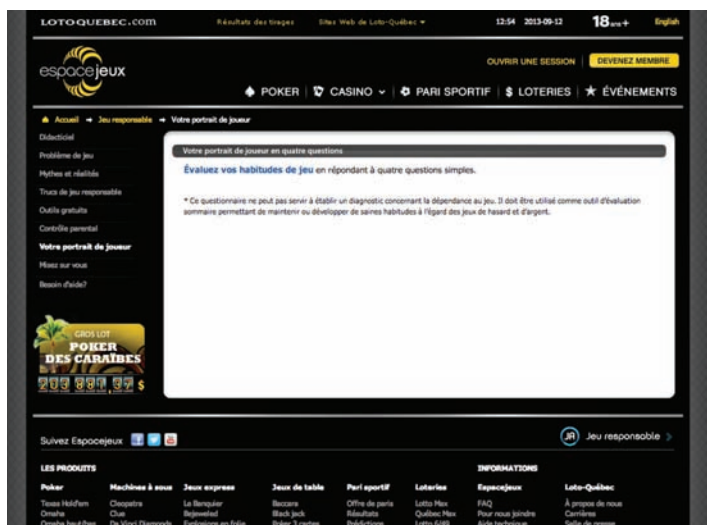


Figure 3: Screenshot of the page on the Espacejeux website that presents the problem detection test, December 10, 2013

2.2.3 Responsible gambling measures on gambling websites considered as illegal

The Working Group also monitored the responsible gambling measures found on the five poker websites and the five casino websites that are the most popular with Quebecers and that are deemed illegal (see Finding SE-8.1 to Finding SE-8.4). An analysis reveals that these websites present a number of responsible gambling measures. For example, all of the websites but one offer gamblers the possibility of setting a weekly deposit limit. Certain websites allow gamblers to limit their time at the tables or the buy in tournaments. Moreover, all of the poker websites and three of the five casino websites offer their customers access to their gambling history. Among the most popular poker websites, williamhill.com and partypoker.com send gamblers regular reminders of the time elapsed since the beginning of the gaming session. Lastly, almost all of the websites offer gamblers the possibility of barring themselves. In a word, our analyses reveal that the allegedly illegal websites offer responsible gambling measures although the number and accessibility of the measures vary.

When Espacejeux launched its website, Loto-Québec implemented several responsible gambling tools. The Working Group noted problematical situations from the standpoint of their availability. What is more, the nature and number of the tools is not sufficiently differentiated from those available on a number of allegedly illegal websites.

3. CONCLUSION


Three years after the establishment of Espacejeux, the data do not corroborate the predictions of the socioeconomic hypothesis. On the one hand, the advent of Loto-Québec on the Internet did not make it possible to channel illegal gambling offerings in a controlled network. On the other hand, Loto-Québec’s gambling offerings appear to be secure and honest but certain limitations have been noted with regard to responsible gambling.

The Working Group believes that it is hard to clearly draw a conclusion concerning the hypothesis whereby the launching of a government-controlled online gambling website would make it possible to offer Quebecers responsible gambling. Indeed, in a context where the government corporation is obliged to achieve economic profitability, the Working Group worries that Loto-Québec’s self-regulation is creating a conflict or the appearance of a conflict between its profitability and social responsibility mandates. Loto-Québec’s self-regulation can lead to unilateral decisions that may compromise Quebecers’ well-being.

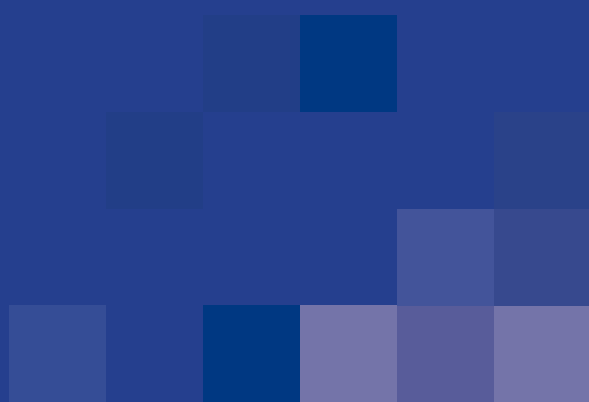
The example that illustrates the justification for our concern is given by the choice that Loto-Québec made to streamline the registration form by abandoning the detailed presentation of its responsible gambling tools. By making this choice, the desire to register greater numbers of Quebecers on the government corporation’s website was probably more important than the desire to offer responsible gambling tools. Not only is the approach no different from the approaches on major online gambling websites deemed illegal but it

also contradicts the mission, perspective and strategic directions that the government corporation has spelled out. Furthermore, were it not for our monitoring throughout the entire duration of our mandate, this decision would have gone unnoticed.

That being the case, the Working Group believes that it is worthwhile to remind the Québec government that it is mainly responsible for ensuring the public's well-being. The government must demand of government corporations that engage in commercial operations that put at risk the quality of life and health of Quebecers that they so do while abiding by strict rules, not only by establishing standards but also by submitting to follow-up carried out by independent regulatory bodies. At the end of its mandate, the Working Group has concluded that Loto-Québec's self-regulation poses a major problem. The remedy appears to be a matter of priority.



CHAPTER 4
LEGAL HYPOTHESIS





CHAPTER 4

LEGAL HYPOTHESIS

This chapter examines the third hypothesis. The legal hypothesis can be formulated as follows: When Loto-Québec announced the creation of Espacejeux, it is postulated that the government corporation's website would thwart the online gambling sector that is developing and operating illegally.⁵⁴

This chapter first examines federal legislation governing gambling in Canada. The second section looks at whether the legal hypothesis is borne out. The third section focuses on the reasons that explain the findings. Lastly, the fourth section proposes solutions.

Three years after the launching of the Espacejeux website, online gambling websites continue to operate and be available to Quebecers in what is deemed an illegal manner. Despite the situation, the authorities responsible have not introduced concrete measures to remedy it.

1. THE CRIMINAL CODE

To grasp the legislative issues linked to online gambling, it is essential to bear in mind that specific sections of the *Criminal Code* govern gambling.

Sections 200 to 209 of Part VII of the *Criminal Code* stipulate that, barring certain exceptions noted in section 207(1), all forms of lotteries and gambling and all accessory activities linked to their exploitation constitute criminal acts that make the individuals who operate them or those who help or encourage them liable to imprisonment for a term not exceeding two years (Appendix 4).

Moreover, section 207 of the *Criminal Code* establishes certain exceptions to this general prohibition, in particular that a province may: (1) establish and operate a lottery⁵⁵ if it is the government of the province that operates it within the province's territory and (2) issues licences to charitable

or religious organizations, which, for charitable or religious purposes, wish to set up and operate lotteries. As for online gambling, section 207(4)(c) of the *Criminal Code* stipulates that only a province may set up and operate a lottery or a game of chance through the means of a computer. This means, for example, that even if a province wished to do so, it could not issue licences to private online gambling operators, even if the latter were charitable or religious organizations.

From the standpoint of online gambling, section 207(4)(c) of the *Criminal Code* only allows a province to conduct and manage a lottery or a game of chance on or through a computer.

2. ACCESSIBILITY OF WEBSITES DEEMED ILLEGAL

Despite the sections of Part VII of the *Criminal Code* that refer to online gaming, in 2010 Quebecers "had access to some 2000 online gambling websites."⁵⁶ Three years later, the situation is the same. The data presented in the monitoring system reveal that, depending on the period observed, the number of websites accessible to Canadians ranges between 2171 and 2235, of which over 500 have a gaming platform in French (Finding J-12.1, Table 12.1.1).

To evaluate the websites' accessibility, we examined in a search engine the visibility and ranking of online gambling websites, i.e. Espacejeux and the allegedly illegal websites. This technique makes it possible to measure the accessibility of websites. Accordingly, when Quebecers conduct Web

⁵⁴ Ministère des Finances (2010). "Le gouvernement autorise la Société des loteries du Québec à offrir le jeu en ligne," press release, February 3. Consulted at www.finances.gouv.qc.ca/documents/Communiqués/fr/COMFR_20100203.pdf.

⁵⁵ The legal expression here is understood broadly and encompasses other types of gambling.

⁵⁶ Ministère des Finances. *Op. cit.*

searches using a search engine such as Google by means of the most popular expressions or keywords, big international websites such as PokerStars, Full Tilt and 888 appear most often and are better ranked than Espacejeux. For example, the main websites deemed illegal are indexed⁵⁷ and appear on between 31% and 86% of the keywords that Quebecers use most frequently on Google to find websites offering poker games. Espacejeux appears on 16% of the expressions (Finding J-12.2, Table 12.2.1). The average ranking of deemed illegal poker websites varies between second rank (pokerstars.net) and 26th rank (888poker.com). In comparison, when Google displays Espacejeux, it ranks 29th on average (Finding J-12.3, Table 12.3.1).

As for casino websites, those regarded as the most popular appear on 21% or fewer of the keywords that Quebecers use to find such websites. Espacejeux appears on 17% of the keywords (Finding J-12.2, Table 12.2.2). When a keyword search concerning online casino gambling is launched on Google, Espacejeux ranks 17th on average. In comparison, the ranking of Quebecers' favourite casino websites ranges from 6th (freeslots.me) to more than 50th (casino.bet365.com) (Finding J-12.3, Table 12.3.1).

What is more, in the wake of the launching of the Espacejeux website, the Working Group did not note any additional means or resources adopted by the government to thwart the online gambling offerings deemed illegal.

The monitoring system data ultimately reveal that in 2013 the websites deemed illegal were still accessible to Quebecers. This is especially clear for online poker in respect of which the websites deemed illegal are more visible and better ranked than Espacejeux on the Internet.

3. POSSIBLE REASONS FOR THE PRESENCE OF WEBSITES DEEMED ILLEGAL

Given the accessibility of gambling websites deemed illegal, how is it that, despite the legislative provisions mentioned earlier, online gambling continues to be offered to Quebecers in a manner deemed illegal and without penalty? How is it that, until now, the authorities responsible have not implemented concrete measures to remedy the situation?

This section proposes reasons that may explain the findings described above. The reasons focus on: (1) police initiatives; (2) the ambiguity of legislation with respect to gambling; (3) the legality of websites hosted outside Canada; and (4) the presence of private operators in Québec.

3.1 POLICE INITIATIVES PERTAINING TO ONLINE GAMBLING IN QUÉBEC

The most obvious way to thwart gambling deemed illegal appears to be the application of the sections in Part VII of the *Criminal Code* that refer to online gambling. Section 92 of the *Constitution Act*, 1867, stipulates that the Canadian provinces have jurisdiction over the administration of justice in their territory, in particular the duty to investigate criminal offences and to pursue before the courts any allegation of illegality in respect of gaming (including online gambling).

Over the past three years, no police initiative targeting online gambling appears to have been carried out.⁵⁸ Of course, the reality of online gambling goes beyond boundaries and, consequently, the ability of police officers to investigate is complicated because the proof needed to lodge criminal charges in respect of online gambling is often located outside Canada.

This being the case, it remains that to thwart allegedly illegal online gambling does not appear to be a priority for the police in Québec. Since 2010, no indictment has been brought against the private operators who offer online gambling in Québec. Data from the Uniform Crime Reporting Program provided by the Ministère de la Sécurité publique du Québec show that the situation is not unique to online gambling and that land-based gambling is not a priority for Québec police forces either. Between 2010 and 2012, the number of offences concerning gaming and betting occurrences subject to investigation fell from five to three per year, while the number of indictments declined from four to one per year. These figures contrast with those for Ontario, where the provincial police maintain a crime investigation and intelligence unit related to gambling. In 2012, 45 offences in Ontario were subject to investigation and indictments respecting gaming and betting were reported. For Canada overall, in 2012, 68 offences and 14 indictments were reported.⁵⁹

⁵⁷ An indexed website is registered with the search engines so that it appears in the results.

⁵⁸ Personal communication from a Sûreté du Québec police officer.

⁵⁹ *Ibid.*

3.2 THE AMBIGUITY OF SECTIONS IN PART VII OF THE *CRIMINAL CODE*

Another explanation concerning the complexity of cracking down on operators deemed illegal who offer Quebecers online gambling stems from the ambiguity of sections of Part VII of the *Criminal Code*. Indeed, there is ambiguity, in particular, as regards the interpretation of the legal expression “conduct and manage” that is neither clearly defined in the *Criminal Code* nor in the jurisprudence.

3.2.1 The establishment and exploitation of land-based gambling

“To conduct and manage” is interpreted differently across Canada. For example, certain provinces maintain that the expression means that the government must simultaneously own the gaming machines, monitor operations (both financial and security considerations) and ensure the compliance of gaming. This is true of Québec, where Loto-Québec operates all gaming, whether land-based or online. Indeed, the government corporation directly controls all gambling-related operations, with the exception of the gaming rooms in Québec City and Trois-Rivières, where a private entrepreneur is responsible for ongoing operations, including the management of cash and on-site security.

Furthermore, other Canadian provinces rely on private companies to operate their land-based gambling offerings. In certain provinces, “conduct and manage” means that the province must be the operating mind⁶⁰ of gambling offerings, while private companies may manage the day-to-day operations. For example, in British Columbia, the British Columbia Lottery Corporation (BCLC), a government corporation, owns the VLT machines and slot machines, but a private entrepreneur, who abides by the rules that the BCLC has established, is responsible for the other operations. In Nova Scotia, the situation is similar except that the private entrepreneur also owns the games and operates them under the supervision of the Nova Scotia Provincial Lotteries and Casino Corporation, a provincial agency. Ontario, Alberta and Saskatchewan have also decided to manage gambling operations by granting contracts to private casino operators or to Aboriginal communities.

3.2.2 The establishment and exploitation of online gambling

From the standpoint of online gambling, the provinces also interpret differently the notion of “conduct and manage.” As we noted earlier, in Québec the government corporation fully assumes the management and operation of online gambling. In British Columbia, the same situation prevails. What is more, British Columbia also operates online gambling for Manitoba, with which it agreed in January 2013 to share its online gambling infrastructure. In Ontario, online gambling is still not offered but talks are now under way to eventually allow a private operator to operate, under contract, all online

gambling offered to Ontarians. However, the Ontario Lottery and Gaming Corporation (OLG) is expected to be responsible for certain facets, in particular age and identity checks of gamblers and monitoring of financial transactions. Thus, it is a private operator that will operate all of the games under the aegis of a contract with the provincial authority (OLG).

The Working Group notes that Québec interprets “conduct and manage” the most restrictively and conservatively of any province.

3.2.3 The legality of online gambling

Aside from “conduct and manage,” the interpretation of the sections pertaining to online gambling in Part VII of the *Criminal Code* also raises numerous questions about the legality of such gambling.

In Canada, the opinions of government authorities are unanimous in concluding that an operator who operates or hosts a non-governmental online gambling website in Canada is acting illegally. Moreover, the jurisprudence from the *Starnet* decision in British Columbia in 2001 and the *Cyber World Group* decision in Québec in 2007 supports this interpretation. In both cases, police investigations led to indictments and guilty pleas. Furthermore, a decision of the Prince Edward Island Court of Appeal confirms that a province may not issue a licence to a private online gambling operator that would operate in its territory and offer online gambling to individuals outside the province. The Supreme Court of Canada confirmed the decision.

However, stakeholders and jurists who specialize in the gambling sector do not all agree on the legality of an operator or a website operating entirely or mainly outside Canada and whose gambling offerings is available in the Canadian provinces. Of course, the Québec government’s stance is that any non-governmental gambling offering is illegal, but others do not share this viewpoint. For example, an article published in the *Canadian Journal of Law and Technology* mentions that this field of law is changing constantly. It emphasizes that the legality of online gambling in Canada is debatable and, that in the absence of jurisprudence, developments in this realm are unpredictable. What is more, having analyzed the *Starnet* case, the authors conclude their article by suggesting that a private operator could offer Canadians online gambling while abiding by the *Criminal Code*.

“From the facts of the *Starnet* case, the resulting changes SCI made to its corporate structure and through our analysis of the Code, perhaps we now have some idea as to how such a company should structure itself to comply with the Code.

In short, the prudent approach is to minimize or eliminate all connections with Canada. All download, database and gaming servers should be located in a jurisdiction where online gaming is lawful.”⁶¹

⁶⁰ Manitoba Gaming Control Commission, *Gaming in Manitoba*. Consulted at www.mgcc.mb.ca/gaming_in_mb_main.html#q7.

⁶¹ C.I. Kyer and D. Hough (2001). “Is Internet gaming legal in Canada: A look at *Starnet*” in *Canadian Journal of Law and Technology*, 1(1). Consulted at cjltd.dal.ca/vol1_no1/articles/01_01_KyeHou_gaming_fset.html.

The lack of clarity of the *Criminal Code* with respect to online gambling, if only because there is no clear jurisprudence that concludes that anyone who operates a website giving access to paying online gambling commits an offence under the *Criminal Code*, leads to unquestionable confusion. This imbroglio was emphasized, in particular, during debate by the Standing Senate Committee on Legal and Constitutional Affairs, which, in 2008, was asked to study the legislative amendments under Bill C-13, the Act to amend the *Criminal Code*, the *DNA Identification Act* and the *National Defence Act*. During the debate, given the ambiguity of the text of the legislation, the senators emphasized the need to clarify the legal status of extraterritorial online gambling offerings.⁶²

Indeed, should charges be brought against an online gambling operator all of whose operations and components (downloads, databases, gaming servers) are located outside Canada, it is difficult to predict the decisions that a Canadian court would reach given the existing legal texts. Nevertheless, a Supreme Court decision handed down in 1985 (*Libman v. The Queen* [1985] 2 SCR 178) rules that the Canadian courts have jurisdiction when a significant portion of a given offence is committed in Canada. A court might thus conclude that an offence under the *Criminal Code* has been committed by a foreign online gambling operator if the latter clearly aims his offering at Canadian gamblers. The fact of accepting bets from Canadian gamblers might be deemed proof of such intent. A court might also conclude that a significant portion of an offence is committed in Canada since the game itself is played on the computers of Canadian gamblers. However, in the absence of clear jurisprudence concluding to this effect, and in light of contradictory legal opinions in this respect, it seems risky to speculate on how a court would rule.

3.3 THE LEGALITY OF PRIVATE ONLINE GAMBLING OPERATORS OUTSIDE CANADA

A third explanation as to why the authorities responsible do not directly tackle online gambling is that many private operators who are operating in a manner deemed illegal in Canada are operating legally in other countries. Indeed, certain private operators maintain head offices abroad and most of the online gambling websites are hosted in the country where it is legal to offer online gambling. In some places, e.g. Gibraltar, the Isle of Man or Alderney, the exploitation of online gambling is even one of the main economic activities. Consequently, it is unlikely that Québec investigators would obtain the necessary assistance from the authorities to collect the evidence that would lead to indictments in Québec. What is more, even if they succeeded in doing so, it is unlikely that these governments would hand over to Canada the individuals in their territory so that they can be convicted of activities deemed to be legal in their own territory.

3.4 PRIVATE OPERATORS IN QUÉBEC

In Québec, the implementation of concrete measures to thwart gambling deemed illegal are complicated by the fact that in the realm of online gambling a number of allegedly illegal acts are committed by private operators whose websites are hosted in Québec on the Mohawk territory of Kahnawake. As of November 26, 2013, the Kahnawake Gaming Commission (KGC) website indicated that more than 70 online gambling websites, including several that are accessible to Québec residents, held a licence granted by the KGC. The KGC website also indicates that to obtain an online gambling licence, an enterprise must host its website in Kahnawake with Mohawk Internet Technologies (MIT). Accordingly, more than 70 allegedly illegal online gambling websites are hosted in the territory of Kahnawake on the South Shore of Montréal.

The KGC regulatory agency, which is known in the online gambling sector, but which Québec and Canadian authorities do not recognize, regulates under its own authority several online gambling operators throughout the world. The KGC website announces that the agency was one of the first in the world to issue licences and set standards governing online gambling. While the online gambling websites are allegedly illegal, KGC and MIT appear to have operated with impunity since their creation. This situation attracts the attention of stakeholders in the gambling industry at the national and international level. During our consultations, several stakeholders pointed out this situation.

⁶² A. Cabot (1997). *Internet Gaming Report*, Hotel Casino Media, Las Vegas, pages 461-467. Consulted at www.lawtimesnews.colm/200712101579/headline-news/senate-saves-the-day-for-online-gambling.

4. SOLUTIONS

In light of the foregoing overview, how might the Québec government better regulate non-government online gambling offerings? What steps might it take? To date, extensive discussions with police forces, civil servants, jurists, senior executives of private and government operators and representatives of government regulatory bodies established on four continents have enabled the members of the Working Group to identify several solutions to these questions. Certain measures affect gamblers, others are aimed at the intermediaries and suppliers of online gambling, while still others directly concern the operators.

After three years of consultations, we believe that two solutions are avenues that would enable the Québec government to thwart the deemed illegal online gambling sector and ensure Quebecers' well-being. The first possibility is the creation of a portal through which private operators can offer online gambling to Quebecers. A second possibility, which stands out because it is becoming a best practice at the international level, consists in establishing a licensing system. In the next section, a description of the two solutions is followed by a description of an array of subsidiary measures⁶³ that should necessarily round out the two proposals.

4.1 CREATION OF A PORTAL

At the beginning of this chapter, we explained that several Canadian provinces rely on private companies to operate their land-based gambling offerings. Indeed, certain provinces, while they remain the operating mind of online gambling offerings, allow private companies to manage day-to-day operations. In Québec, in the government gaming rooms located in Québec City and Trois-Rivières, ongoing operations, including the management of cash and on-site security, are assigned to a private entrepreneur.

By drawing inspiration from these models, the Québec government can explore the possibility that games from private operators be offered to Québec online gamblers exclusively by means of a government-controlled website. In such a model, the government could set up and operate a portal through which it would offer such games to Québec gamblers under a contractual agreement with the private operators.

In order to comply with section 207(4)(c) of the *Criminal Code*, according to which only a province may set up and operate a lottery or a game of chance on or through a computer, the government should be responsible for the management of online gambling offerings, i.e. the operating mind, by establishing standards and precise rules. What is more, it is the government that must define the gaming compliance rules, the rate of return, the types of games offered, security measures pertaining to fraud and money laundering, and

responsible gambling strategies. In addition, the management of the identity of gamblers, including registration and financial transfer procedures, would be solely defined by the government. Accordingly, in Québec, the games of private operators would, in the wake of a contractual agreement with the government, be under the management of the body designated by the province. Consequently, through the contractual agreements, the private operators would undertake to no longer accept gamblers from Québec on their websites that are now deemed illegal (.com). A Québec gambler who, for example, attempted to directly access pokerstars.com would be automatically redirected to the government portal, from which he could access the PokerStars games offered to Quebecers on a website that Québec would manage. The creation of such a portal would give Quebecers access to online gambling offerings managed by the government and proposing both the games of private and public operators. It follows that such a model represents an increase in the legal online gambling offerings made available to Quebecers.

Consequently, its development should necessarily be accompanied by the establishment of an independent regulatory body. As indicated in the two preceding chapters, such a body would ensure the security, integrity and responsibility of all of the games offered online. To be effective, the independent regulatory body must have a mandate to monitor and control gambling offerings. It must also include in its staff legal, technological and economic experts who are proactive in respect of the rapid changes occurring in online gambling.

Moreover, to ensure that the portal thwarts illegal offerings, regulates legal offerings and ensures that the government earns profits, the solution, like that of licences, should be accompanied by an array of subsidiary measures, the most essential of which are presented in section 4.3 of this chapter.

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⁶³ A “subsidiary measure” is taken in this report to mean a measure that is secondary, accessory or that rounds out a more important measure.

4.2 A SYSTEM OF ONLINE GAMBLING LICENCES

A licensing system, the most promising solution to enable Québec to better regulate online gambling, has gained widespread acceptance at the international level. A gambling licence, issued by a provincial regulatory body, would allow several private operators (the Operators) under certain conditions established by the Québec government (the Owner) to offer online gambling to Quebecers.⁶⁴ Such conditions can focus on the security and integrity of the games and responsible ways of offering them such that vulnerable, at-risk populations are protected. This strategy is becoming the best practice at the international level to control online gambling offerings.

Notwithstanding that the *Criminal Code* does not allow a province to issue licences to private online gambling operators, the Working Group believes it is useful to describe this solution, for three reasons.

First, online gambling is offered in networks. The network oversteps all boundaries, whether they are established in space, time or even in the institutional and symbolic sphere.⁶⁵ In this context, the notion of a State attempting to thwart online gambling is obsolete.

Second, the online gambling sector is characterized by technological innovation that is complex to manage. In addition, it is unrealistic to think that such games can be produced efficiently without the requisite financial and human resources. It is also impossible to promote them without relying on a robust marketing network. Accordingly, it is difficult for a State monopoly to be competitive against private operators and offer consumers the best product. As the regulators from certain countries have confirmed,⁶⁶ it is essential to establish a system that allows for the creation and regulation of an open online gambling market such that, on the one hand, gamblers have access to the best products and, on the other hand, vulnerable gamblers and young people are protected.

Third, our consultations over the past three years have revealed the increasingly widespread adoption of gambling licensing models. At present, this solution has been adopted

by a number of European countries, including France, the United Kingdom, Italy and Denmark, and by Nevada, Delaware and New Jersey in the US.⁶⁷ Licences are also granted in most of the Australian states for sports betting and online races. A committee responsible for reviewing legislation governing online gambling in Australia has also recommended the development of a five-year pilot project to issue licences to private and international operators that would offer Australians online poker tournaments.

4.2.1 International experience

To fully grasp the issues surrounding the implementation of an online gambling licensing system, we conducted consultations and qualitative interviews with the representatives of six States that are regarded as world leaders in the regulation of online gambling, i.e. the United Kingdom, Italy, Denmark, France, Australia and Nevada in the US. They estimate that the issuing of licences and the adoption of subsidiary measures overseen by a regulatory body enables them to control nearly 95% of the online gambling market where their citizens play.

4.2.1.1 Private operators

During our consultations, Jenny Williams, commissioner and CEO of the UK Gambling Commission, noted that at the heart of the British philosophy is the notion that “consumers are better served in a free, open market that allows for innovation through competition between entrepreneurs.”⁶⁸ The States that we studied share the idea that the private industry is best placed to recognize, evaluate and develop gambling activities in which online gamblers actively wish to participate. They believe that private operators are in a much better position than a public operator to offer a diversified and innovative product that is at the avant-garde of what consumers want, while being secure. However, to be effective, this open market demands excellent monitoring and oversight.

⁶⁴ According to the *Civil Code of Québec*, “a contract is formed by the sole exchange of consents between persons having capacity to contract. The contract itself is a legal act consisting in a commitment by two parties to abide by certain obligations that they define. The owner of a property may, through a contract, grant to a third party the management of a given property. The owner remains the owner of the property and the third party, its manager, its subcontractor and manager, according to the type of contract selected. There are three types of contracts possible: one of them is the operating licence. An operating licence contract in respect of a given property is a legal act through which a person, called “the Owner,” authorizes another person, called “the Manager,” to use the property for specific purposes in a given territory in exchange for the payment of a certain consideration (fee). The licensing contract may be exclusive, i.e. granted to a single Manager. However, it is also possible to conclude a licensing contract with several Managers.

⁶⁵ P. Soriano (2001). “Zéro stock et juste à temps” in *Les cahiers de médiologie*, (1): 143-149.

⁶⁶ Interviews conducted in Oslo from September 30 to October 4, 2013 with A.G. Burnett, Chairman of the Nevada State Gaming Control Board; Francesco Rodano, Head, Remote Gaming Agency, Italy; Birgitte Sand, Director, Danish Gambling Authority; and Jenny Williams, commissioner and CEO, UK Gambling Commission.

⁶⁷ A number of other American states, in particular Illinois, Ohio and California, are adopting legislation to allow the granting to private operators of online gambling licences.

⁶⁸ Jenny Williams, commissioner and CEO, UK Gambling Commission. Interview conducted in Oslo, Norway, on October 4, 2013.

4.2.1.2 Licensing revenues

Online gambling licences generate revenues for the State. Such revenue comes from licence fees and a percentage of the operators' revenues. The level of taxation varies from place to place and from one type of game to another. In Nevada, the operators' revenues are taxed at 6^{3/4}%. In the United Kingdom, the tax is set at 15%. In Italy, sports betting is taxed at 4%, poker tournaments at 3% and poker games and other casino games at 15%. In Denmark, a fixed tax rate of 20% applies. In France, racetrack betting is taxed at 60%, sports betting at 50% and poker at 35%. The French tax rates are infinitely higher than those noted elsewhere and some observers believe that this is affecting the long-term survival of the French online gambling licensing system. Indeed, because of heavy taxation, a number of operators are not renewing their French licences. Moreover, since the approved online gambling websites must lower the level of remuneration of gamblers in order to maintain their revenues, French gamblers are increasingly tempted to turn to illegal sites that offer them a bigger proportion of bets.⁶⁹ A recent survey reveals that 38% of French online gamblers were gambling on websites that operate without a licence issued in France.⁷⁰ In light of these facts, the online gambling regulatory body is advocating a change in the tax base.

We conclude that part of the licensing system's success depends on the level of taxation, which must be fair and reasonable for everyone. When such is the case, the online gambling licensing system appears to have excellent regulatory potential since, as we noted earlier, the directors of several regulatory bodies confirmed that they control nearly 95% of the online gambling market in their territory.

4.2.1.3 The need for a regulatory authority

While the heads of the authorities consulted agree on the technological and commercial superiority of private operators to offer secure, competitive online gambling, all of them clearly stated that the liberalization of the online gambling market requires the dynamic presence of an effective regulatory body. Only such an authority can ensure compliance with conditions governing the issuing of licences and that competition between operators is fair and governed by clearly established rules.

In the jurisdictions studied, the regulatory bodies have a mandate, in particular, to oversee security and crime and to protect minors and vulnerable gamblers. They ensure the application of rules and obligations to which the operators that apply for licences must abide. While the rules and obligations vary from one jurisdiction to the next, they usually cover the area relating to the technical standards of software pertaining to online gambling or to the servers that contain information on gamblers' accounts.

The regulatory bodies must also take immediate enforcement action in the event of non-compliance with the rules. Our consultations revealed that the States that have adopted a licensing system have also adopted measures that ensure the system's integrity. For example, in Denmark, the authorities send formal notices to offending operators. They also have the possibility of filing for an injunction with a judge who may then compel the banks and Internet service providers to block the operations of an offending operator. In Italy, Internet filtering is used to ensure compliance with the licensing system. Accordingly, under consumer protection legislation, the Agency of Customs and Monopolies issues a list of online gambling websites that have not obtained the necessary concessions. Based on the list, Italian Internet service providers are obliged to block access to the sites. In Australia, the Australian Communication and Media Authority, the federal regulator, is empowered to conduct investigations and submit complaints to the Australian federal police force, which may then conduct its own investigations and lay charges if need be.

4.3 SUBSIDIARY MEASURES

The international experience clearly reveals that the issuing of licences alone is insufficient to ensure the efficacy and long-term survival of such a system. All the evidence suggests that the creation of a portal alone would also be insufficient in respect of the online gambling market. To obtain the desired result, control over online gambling must hinge on an integrated system of subsidiary measures. Taken individually, such measures are ineffective. They must be implemented concomitantly to produce the desired effect.

4.3.1 The transmission of formal notice to illegal operators

In an integrated online gambling control system, the drafting and transmission of formal notices to private operators offering gambling deemed illegal is inexpensive and fairly effective. In addition to invoking the sections of the Criminal Code that apply to gambling and online gambling, the formal notice first makes it possible to enjoin the private operators to cease accepting Québec gamblers on their websites and specify the consequences of failure to comply with the formal notice (criminal indictment, civil prosecution, civil injunction, and so on). During our consultations, a Canadian jurist reminded us that the majority of private operators who offer allegedly illegal online gambling in Canada are entrepreneurs who, of course, dare to take risks, but who do not wish to fall foul of the law. Consequently, for many of the operators, formal notice is probably sufficient for them to cease to offer their products to Quebecers and no longer accept them as customers on their online gambling website. The countries or regions that resort to formal notice to control the online gambling market have set up government agencies and

⁶⁹ Derreumaux, O. (2013). Le régulateur des jeux craint une baisse des recettes fiscales. *Le Figaro*. Consulted at: www.lefigaro.fr/societes/2013/08/19/20005-20130819ARTFIG00437-le-regulateur-des-jeux-craint-une-baisse-des-recettes-fiscales.php.

⁷⁰ Tovar, M.-L., Costes J.-M., & Eroukmanoff, V. (2013). Les jeux d'argent et de hasard sur Internet en France en 2012, *Tendances*, 85. Consulted at: www.economie.gouv.fr/files/tendances_jeux_en_ligne_2013_0.pdf.

systems that enable their officials to conduct the requisite verifications and investigations to confirm that an operator is acting illegally.

Accordingly, in Québec, the solution of sending formal notices should be accompanied by a decision by the government to mandate an agency to constantly monitor online gambling offerings available to Quebecers. Second, such an agency (e.g. the Ministère de la Justice, a special prosecutor from criminal and penal prosecutions, or a regulatory agency) should be mandated to draft and transmit formal notices and ensure the necessary follow-up. Lastly, to ensure the credibility of such a solution, the government should determine the consequences and measures to adopt in the event of failure to comply with the formal notice and how they would be carried out.

4.3.2 Filtering illegal sites

One of the measures sometimes mentioned to control the online gambling market is the systematic filtering of illegal websites, indeed to allow Internet service providers to block public access to certain websites. Until now, the majority of democracies that recognize their citizens' freedom of expression have hesitated to resort to the unilateral filtering of alleged illegal online gambling websites. Elsewhere in Canada, in 2006, the members of the deputy ministers' task force on gambling offered very little support for the idea of asking Internet service providers to block online gambling websites.⁷¹

However, the possibility exists in certain countries of blocking websites, in particular in France and Denmark. In addition to their licensing system, the countries may, through a court injunction, request that certain websites that do not possess an online gambling licence be blocked. The measure is not intended to block the websites in themselves but instead to bolster and make more effective the licensing solution chosen by the countries to regulate online gambling offerings. In Italy, the government has adopted legislation that empowers the authorities to systematically order Internet service providers to block websites that offer allegedly illegal products and services, e.g. online gambling, child pornography, fraudulent sales, and so on. More than 2000 online gambling websites have been blocked in Italy pursuant to the legislation.

As is true of formal notice, the decision to filter and block illegal online gambling websites must be made hand in hand with the decision to mandate an agency to effectively, constantly monitor the online gambling offerings available and conduct the necessary follow-up with the authorities concerned.

4.3.3 The prohibition of certain public contracts

To round out a key measure that would make it possible to control the market and curb the expansion of the allegedly illegal online gambling sector, it would be advisable for Loto-Québec to cease to grant contracts to suppliers closely or remotely linked to operators whose allegedly illegal online gambling offerings are available to Quebecers.

At present, various online gambling suppliers simultaneously offer their services to Loto-Québec and to other online gambling operators that the Québec government deems to be illegal. For example, Spielo G2 is an important partner of Loto-Québec that ensures the operation of Espacejeux. It also provides nearly 100 online poker portals and numerous online casinos.⁷² A number of Spielo G2's clients, in particular bet365, 888 and William Hill, offer deemed illegal online gambling to Quebecers. As we noted at the beginning of this chapter, this business situation calls into question the notion that online gambling offerings are "criminalized" in Québec.⁷³ However, it is contributing to maintaining the ambiguity concerning the legality of private online gambling offerings.

To stem the development of online gambling deemed illegal offerings in Québec, the government must establish a clear rule governing the choice of Loto-Québec's partners, regardless of the solution adopted. Such a rule could stipulate that any supplier linked to operators offering allegedly illegal online gambling may not obtain contracts from the government corporation or the Québec government. As a result, such a rule would help reduce the allegedly illegal online gambling sector since the suppliers wishing to pursue their business dealings with Loto-Québec would be confronted with an alternative: either they terminate their contractual agreement with Loto-Québec or they relinquish certain clients offering deemed illegal gambling to Quebecers.

⁷¹ M.D. Lipton and K.J. Weber. *Internet Gambling Report — 12th Edition — Canada*. Consulted at www.gaminglawmasters.com/articles/pdfs/10_Nov_IGR_12th_edition.pdf, pages 28-30.

⁷² 10Bet Casino & Games; Expekt; PokerHeaven.es; 888 Casino; Gala Bingo; Redbet; BeaBingo; Gala Casino; Royal Games Bingo; bet365 - Spain; Gold Club Casino; SaluteGame; bet365 Games; Heaven Casino; Sky Vegas; Betaland; Hellenic Poker; Slotmine; bet-at-home Poker; Hepsibahis; Smart Live Sports; Betfred Games; Illinois Lottery; SportingBet; Betfred; Sportsbook; Jackpot Palace Casino; SportsSpread.com; betoto.com; JuegaPokerYa; Stan James Sportsbook & Racebook; BetVictor Games; Loterie Nationale; Stella Poker; Betway Games; Lottomatica; Sunset Casino; Bid Bingo; Love Bingo; Svenska Spel; Bingo Slottet; Love Your Slots; TGF Poker; Bingon.com; Lyckocasino.com; The Football Pools; BingoSjov.dk; Maxbet; TippmixPro; Boylesports; Mecca Bingo; Totesport Casino; Butlins Arcade; MermaidBet; Totesport Games; Butlins Bingo; miapuesta.es; Totosi.it; bwin Casino; Mokum Bingo; TuVictoria; Casino Club; MuchosPoker; Unibet Bingo and Skill Games; Casino Club Poker; My Georgia Lottery; Unibet France; Casino.net; My Lotto.co.nz; UWin; Chit Chat Bingo; Nationale Loterij; Veikkaus; Classic Poker; Norsk Tipping; Ventury Games; Coral Games; Nostrum Poker; Vernons.co.uk; digibet; Paddy Power Games; William Hill Bingo; DTD Casino - Dusk Till Dawn Casino; PAF; William Hill Casino Club; DTD Poker - Dusk Till Dawn Poker; Play Now - BC; Win2Day; Ekstra Bladet Bingo; Play Now - MB; Winner Heaven; Ekstra Bladet Casino; Poker Galaxy; Yahoo Games; El Acumulado; Poker Heaven; YouWin; Poker Metropol.

⁷³ E. Papineau and J. Leblond (2011). "Les enjeux de l'étatisation du jeu en ligne au Canada : une analyse de santé publique" in *Canadian Journal of Public Health*, 102(6): 417-420.

4.3.4 The mandate of the police

A purely repressive measure alone cannot thwart the deemed illegal online gambling sector. Nevertheless, one complementary, expeditious measure to the creation of a portal or the implementation of a licensing system is to mandate and offer the necessary resources to the Sûreté du Québec⁷⁴ to enable it to investigate criminal activities linked to the online gambling offered to Quebecers, regardless of the origin of such activities.

4.3.5 Heightening public awareness

Social prevention is another important subsidiary measure in an integrated system aimed at thwarting illegal online gambling offerings. Social prevention seeks to limit the scope of certain factors associated with offences linked to online gambling by relying on the cooperation of society as a whole. By heightening awareness and informing Internet users of the legislation governing online gambling and the legality of certain websites, gamblers can be equipped to make enlightened choices with regard to the gambling websites proposed to them and, consequently, help thwart the illegal online gambling sector.

The international consultations and an analysis of practices outside Canada to regulate online gambling led the Working Group to conclude that development of an integrated approach is the most effective solution to thwart the illegal online gambling sector, from a sociosanitary, socioeconomic or legal perspective. At the heart of the approach is a licensing system accompanied by subsidiary measures that must also be perceived as short-term solutions that are easy to implement to help curb illegal offerings. To this end, a regulatory agency must ensure ongoing, effective monitoring adapted to technological advances. This solution includes an absolutely essential condition, which is to amend the *Criminal Code of Canada*. The Working Group thus deems it relevant to propose an innovative, promising alternative, which is to develop a portal to enable private operators to offer online gambling to Quebecers. The subsidiary measures should also apply to this alternative.

5. CONCLUSION

Three years after the launching of the Espacejeux website, allegedly illegal online gambling continues to operate and be offered to Quebecers. What is more, the authorities responsible have not implemented concrete measures to remedy the situation. However, upon analysis, the Working Group understands the difficulties that those responsible for cracking down on operators who offer allegedly illegal online gambling to Quebecers are facing.

In light of this overview and in the wake of several consultations, the Working Group believes that, to control the online gambling market, protect consumers and generate revenues for the government, the best solution for the government is to establish clear rules and open up the online gambling market to private operators. In fact, the best solution is to establish an online gambling licensing system.

However, current federal legislation does not allow the adoption of such a solution. Accordingly, the first step to take to set up a licensing system is to amend the *Criminal Code*. Despite the complexity of this task, the Working Group firmly maintains that the licensing system solution is the most promising to control the online gambling market. For this reason, the Working Group suggests that Québec assume a leadership role in the realm of gambling with the other provinces and the federal government so that the *Criminal Code* is amended to allow the provinces the possibility of adopting a licensing system.

This solution hinges, by and large, on international experience. Furthermore, to be effective, a licensing system must be accompanied by subsidiary measures. A licensing system must also be operated by a regulatory agency that ensures compliance with the rules that the government has established and that is authorized to enforce when such is not the case. The agency should be able to engage in monitoring within the new parameters that the digital society is imposing. Ultimately, it appears that the online gambling licensing solution would compel operators to offer an honest, secure, avant-garde product and protect consumers, in particular young people and vulnerable gamblers.

⁷⁴ According to the Regulation respecting the police services that municipal police forces and the Sûreté du Québec must provide according to their level of jurisdiction, the Sûreté du Québec alone is empowered to investigate this type of criminal offence. Consulted at www2.publicationsduquebec.gouv.qc.ca/dynamicSearch/telecharge.php?type=3&file=/P_13_1/P13_1R6.htm.



CHAPTER 5
RECOMMENDATIONS



CHAPTER 5

RECOMMENDATIONS

At the conclusion of its work, the Working Group formulated five recommendations that stem, first and foremost, from the information obtained through the monitoring system and reflection surrounding our consultations and reading. They also reflect theoretical perspectives, which, during the first six months of our work, became operational through the conceptual stances that achieved a consensus in the Working Group.

From the outset of our deliberations, we formulated two basic premises. The first one posited that online gambling is an activity that must remain accessible to Quebecers. The Working Group discarded the prohibitionist option. Online gambling is here to stay. Our rationale was, therefore, to find solutions to a practice, which, like other forms of potentially addictive behaviour, is pleasurable but can cause problems. The other premise focused on the existence of a government corporation. The Working Group believes that the establishment by the government of Loto-Québec was a sound societal choice, one likely to promote the common good. However, the Internet is demanding adaptations because the parameters of online gambling are not the same as those respecting land-based gambling.

The Working Group also agreed on the necessity of adopting an ethical approach.⁷⁵ We quickly grasped the complexity of questions concerning online gambling. We agreed that the problem of online gambling must be examined in light of the multiple perspectives that influence it. We thus had to find an approach that establishes the foundation for research that takes into account the divergent perspectives and rationalities of the purpose of our study. As a result, we had to adopt a perspective that would emphasize that the problem of online gambling is multidimensional. The Working Group was of the opinion that, in order to grasp the problems, our work must cover altogether the offerings and promotion, prevention and treatment, legislation and regulations, and the economy and taxation. In a word, to respond to the mandate that we accepted meant taking into account several facets while ensuring a maximum of coherence in our recommendations.

Aside from the ethical framework, the Working Group also expressed at its initial meetings a concern to protect the members of society, especially the most vulnerable ones. Our

work had to reflect a perspective centred on the common good, a notion that somewhat gave substance to our ethical framework. Our recommendations thus had to advocate the need to guarantee an honest, secure gambling environment for gamblers and propose preventive measures for the general public and vulnerable gamblers, and curative services for gamblers struggling with gambling-related disorders. The notion of protection also demanded that the profits generated by online gambling be deposited in Québec's Consolidated Revenue Fund to be returned to the community. The notion of the common good thus accompanied and guided us throughout our deliberations.⁷⁶

Lastly, we had to consider that online gambling is developing against a backdrop of globalization, i.e. in a free space of transactions and knowledge, and the circulation of individuals, capital and goods. It should be possible to update and test our ethical concern and concern for the common good by means of the Internet.

The logical monitoring model was conceptualized bearing in mind the foregoing theoretical considerations. Having noted the evidence generated by monitoring, we drew conclusions following the testing of the public health, socioeconomic and legal hypotheses that we examined. The five recommendations that follow are thus the outcome of a theoretical framework that takes into account the common good and the digital society as well as the evidence generated by the monitoring system.

⁷⁵ R. Massé (2003). *Éthique et santé publique : Enjeux, valeurs et normativité*. Québec: Presses de l'Université Laval.

⁷⁶ Michèle Stanton-Jean's research on ethics and the common good and our discussions with her underpinned this approach.

RECOMMENDATION 1

Bearing in mind that:

- a. a gambling operator usually pursues a general objective of profitability;
- b. there is a considerable risk of conflicts of interest when the same corporation pursues contradictory objectives, i.e. the promotion of gambling and the prevention of gambling-related problems;
- c. primary and second prevention in the realm of online gambling is multidimensional, targets the general population, including non-gamblers, and requires specific skills;
- d. the best practice observed with respect to primary and secondary prevention in Canada and elsewhere is to establish an independent foundation that can equip and support the government and the other stakeholders concerned with gambling, in their prevention efforts.

We recommend that the Québec government:

- 1. limit Loto-Québec's social responsibility mandate to the management of online gambling offerings;**
- 2. establish an independent, autonomous, permanent foundation whose prevention mission will encompass the public health, socioeconomic and legal questions that gambling raises.**

The mission, governance and objectives of the foundation could be defined as follows:

Mission: Inform Quebecers about online and other gambling to encourage moderate, enlightened behaviour bearing in mind the sociosanitary, socioeconomic and legal perspectives of gambling.

Governance: A board of directors comprising government representatives, members of the gambling industry and members of civil society from the sociosanitary, socioeconomic and legal sectors would administer the foundation.

Funding would be self-supporting and recurrent and be drawn from revenues generated by gambling revenues.

Objectives: Bearing in mind the sociosanitary, socioeconomic and legal perspectives:

- engage in ongoing monitoring and analysis of changes in online and other gambling;
- promote the emergence of a culture of moderation in the realm of gambling;
- inform, equip and notify the public, government officials, regulators, operators and other stakeholders concerned with gambling and the prevention of gambling-related problems;
- intervene to influence the environment and immediate contexts of gambling.

RECOMMENDATION 2

Bearing in mind that:

- a. individuals struggling with gambling-related disorders resort less extensively to treatment and support services than individuals with alcohol- or drug-related disorders or other mental disorders;
- b. individuals struggling with gambling-related disorders display a complex clinical features in which problems and co-occurring disorders are often present;
- c. the presence of other mental disorders among individuals displaying a gambling-related disorder poses an obstacle to the treatment of and support for them;
- d. stakeholders must know how to detect, evaluate and treat individuals suffering from co-occurring disorders;
- e. only one-third of Québec's regions offer treatment and support adapted to individuals displaying co-occurring disorders.

We recommend that the Québec government:

adapt the treatment and support available to individuals displaying gambling-related disorders to take into account the other mental health needs of such individuals.

RECOMMENDATION 3

Bearing in mind that:

- a. Loto-Québec, in its capacity as a gambling operator in Québec, has a mandate to responsibly manage its gambling offering;
- b. an operator pursues a general objective of profitability;
- c. there is a risk of conflicts of interest when a given corporation pursues contradictory objectives, i.e. the promotion of gambling and the prevention of gambling-related problems;
- d. the best practice observed in Canada and elsewhere is to assign the regulation of gambling to an independent body for online gambling.

We recommend that the Québec government:

create and mandate an independent regulatory body or change and broaden the mandate of the Régie des alcools, des courses et des jeux to regulate and monitor from now on the online gambling sector in Québec. The mandate would include the regulation and monitoring of the promotion, advertising, responsible offering and security and integrity of online and other gambling proposed by all operators, including Loto-Québec.

RECOMMENDATION 4

Bearing in mind that:

- a. Québec cannot control the integrity, security and responsibility of the online gambling offerings of deemed illegal operators;
- b. Québec is depriving itself of tax revenues by not taxing the revenues of private operators that offer Quebecers online gambling;
- c. the reality of the Internet and online gambling goes beyond borders and makes it difficult, if not impossible, for law enforcement agencies to effectively enforce Canadian criminal legislation;
- d. a government regulatory body can effectively monitor diversified online gambling offerings by issuing licences and ensuring compliance with the rules that the government adopts;
- e. the best practice observed internationally is to allow private operators to offer responsible, honest, secure online gambling regulated by the Government.

We recommend that the Québec government:

take the necessary steps to amend the *Criminal Code* to enable the Canadian provinces to issue online gambling licences to private operators;

establish and mandate an independent regulatory body or change and broaden the mandate of the Régie des alcools, des courses et des jeux to establish and administer a self-financing system to issue licences to private online gambling operators;

implement the necessary subsidiary measures to ensure the efficacy and long-term survival of a licensing system.

Given the challenges linked to the amendment of the Criminal Code, in the short term, we also recommend that the Québec government:

explore the possibility of also offering the games of private operators to Québec online gamblers exclusively through a government website. In such a model, the government could establish and operate a portal through which it would offer such games to Québec gamblers, under a contractual agreement with private operators;

implement subsidiary measures that must also be perceived as short-term, easily executed solutions to help curb illegal offerings.

RECOMMENDATION 5

Bearing in mind that:

- a. online gambling and other potentially addictive behaviour are developing against a backdrop of ongoing technological innovation and change in the virtual universe;
- b. monitoring is an essential tool to grasp changes in a recent phenomenon whose impact, especially among minors, remains little-known from a sociosanitary, socioeconomic and legal standpoint;
- c. monitoring must rely on reliable, valid empirical data and is necessary for decision-making.

We recommend that the Québec government:

pursue the monitoring system elaborated by the Working Group through an expert panel capable of ensuring follow-up to sociosanitary, socioeconomic and legal challenges.

CONCLUSION

Aside from the recommendations, the Working Group wishes to transmit a final message to the Ministère des Finances and the stakeholders concerned with gambling. Our deliberations revealed that when stakeholders periodically succeed in reaching a consensus on the broad objectives to be attained, the social climate with regard to gambling is serene. This is true, in particular, in Sweden and the United Kingdom. Without such a consensus, as we mentioned in Chapter 1, debate surrounding the plurality of competing positions call into play irrational elements. The opinions and choices of the stakeholders are indissociable from their conflicting interests, beliefs and perspectives. If such a consensus existed in Québec, such polarized hypotheses would not have been formulated. The maintenance of balkanization between the stakeholders serves neither the general public nor the most vulnerable individuals. It would, therefore, be desirable for social services, regulatory bodies, gamblers, the government corporation, the gambling industry, public health officials and the police to find together a *modus operandi* based on empirical evidence and on the common good.

The Minister of Finance in 2010 wanted an expert panel to examine online gambling. The enthusiastic reception and generous collaboration of the institutions and individuals that we consulted reflect the innovative nature of our mandate in a world transformed by the Internet. Our recommendations constitute the conclusions that we have drawn from our consultations, reading, research data and discussions. It remains for us to hope that this work will prove useful to decision-makers at home and abroad and that it will serve society at large.



APPENDIX 1





APPENDIX 1

MONITORING ONLINE GAMBLING

A monitoring system is based on a logical model, an often schematic tool that presents contextual elements surrounding the phenomenon under study. It describes how the elements combine in the attainment of a common objective by creating coherent links between the inputs (strategic components, resources), outputs (activities and programs) and the outcomes and impacts. This method of organizing data collection makes it possible to situate the monitoring project in respect of an array of factors and establish a logical relationship between the activities implemented and the outcomes, as well as the logical progression between the elements over time. This logical representation of the factors has the advantage of coherently selecting the indicators that allow for the measurement of the anticipated outcomes.

To monitor online gambling, the logical model proposed includes elements that are representative of the three hypotheses put forward by key stakeholders in Québec when the Espacejeux website was launched:

- 1) the sociosanitary hypothesis;
- 2) the socioeconomic hypothesis;
- 3) the legal hypothesis.

Temporal follow-up to the indicators of outcomes is one of the essential, intrinsic functions of the monitoring system: repeated measurements indeed make it possible to clearly perceive change over time. Accordingly, we emphasized, among an array of possible indicators, those that are valid, reliable and recurrent over time. It was thus possible to engage in follow-up over three years.

Moreover, given the significant variations in gambling habits between social groups, we gave priority to a presentation of the findings that highlights such differences when the data allow. Since the only comparisons possible are by gender and age group, we will report the overall findings and the findings specific to each sub-group.

It would have been desirable to integrate a spatial dimension to account for geographic and regional variations throughout Québec. This type of analysis was impossible because of the low prevalence of online gambling in the general population, which prevented the production of robust, reliable data at the regional level.



Figure 4: Logical model for online gambling

1. MEASUREMENT OF THE ATTAINMENT OF RESULTS

A result is defined as an anticipated short-, medium- and long-term change. Indicators are a means of measuring such change. In this monitoring system, the indicators are organized according to the three types of hypotheses proposed at the outset, i.e. the sociosanitary, socioeconomic and legal hypotheses. Based on the hypotheses, the Working Group established a list of indicators deemed essential to ensuring follow-up to changes in online gambling in Québec. From the full list, a short list was established based on the availability and recurrence of information, at least for the prescribed duration of the Working Group’s mandate. These indicators are presented and documented in this report.

It should be noted that, among the indicators that were not selected, some strike us as being essential and relevant for inclusion in an ongoing online gambling monitoring project or in respect of gambling in general, such as advertising for online gambling in the mass media and the electronic and digital media. Obtaining access to data regarding such indicators demanded time-consuming efforts that could only be carried out within the framework of ongoing, long-term monitoring of gambling.

2. PRESENTATION OF THE INDICATORS

Each indicator is presented in a separate information sheet divided into four parts.

- **The first part** includes a general description of the indicator, an operational definition of it and how it must be interpreted.
- **The second part** describes the sources of information used to produce the data pertaining to the indicator.
- **The third part** presents the outcomes obtained through an analysis of the information sources.
- **The fourth part** presents the highlights.



Figure 5: Example of an information sheet

3. SOURCES OF DATA AND COLLECTION METHODS

Three types of data were recorded in the case of monitoring online gambling:

- 1) administrative data, mainly from the Espacejeux website and the Système d'information clientèle pour les services de réadaptation dépendances (SIC-SRD, or the dependency rehabilitation services client information system);
- 2) epidemiological data from the 2009 and 2012 ENHJEU-Québec surveys;
- 3) specific research data, e.g. from the ENHJEU-Québec follow-up survey among online gamblers and a study devoted to secondary school students.

They are used primarily to describe two types of indicator, i.e. indicators on the population's online gambling practices and indicators on the gambling environment, namely gambling offerings and offerings of preventive and curative services aimed at gamblers..

4. SCOPE AND LIMITS OF THE MONITORING SYSTEM

At the time of writing of this report, we were unable to cover certain facets of the monitoring. First, it was impossible for us to inventory backward Espacejeux's promotional activities or those of deemed illegal operators. Second, from the standpoint of prevention measures, we were unable to document whether the information campaigns were implemented in Québec to heighten awareness among gamblers that non-government-controlled online gambling offerings are illegal. Third, the source of data on the assistance and support network prevented us from accurately describing changes in gamblers receiving treatment who display a gambling-related problem. Indeed, administrative data pertaining to accountability collected by the health and social services agencies and the MSSS between 2006 and 2011 are not comparable to those collected since 2012 in the Système d'information clientèle pour les services de réadaptation dépendances (SIC-SRD). Lastly, given the inaccessibility of certain administrative data, we were unable to take stock of changes in the security and integrity of online gambling.

PUBLIC HEALTH HYPOTHESIS

LOGICAL MODEL

RESOURCES (INPUTS)	STRATEGIC DIRECTIONS	ACTIVITIES (OUTPUTS)	OUTCOMES		
			Short term	Medium term	Long term
SS-1 Ministère de la Santé et des Services sociaux and its partners	SS-1 Mobilization of assistance and support resources for gamblers	SS-1 Implementation of preventive measures in respect of gambling	SS-1 Broadening of knowledge of the risks linked to online gambling	SS-2 Reduction in the initiation of minors to online gambling	SS-5 Reduction in gambling-related problems among online gamblers
	SS-2 Information and awareness-raising in the realm of gambling	SS-2 Establishment of a assistance and support network for gamblers		SS-3 Reduction in at-risk gambling practices among online gamblers	

PUBLIC HEALTH HYPOTHESIS

INDICATORS AVAILABLE

Activity SS-1 Implementation of online gambling prevention measures

Activity SS-1.1 List of media campaigns focusing on the prevention of gambling problems

Activity SS-1.2 Budget allocated to information and awareness-raising campaigns devoted to gambling

Activity SS-2 Establishment of an assistance and support network intended for gamblers

Activity SS-2.1 Telephone lines intended for gamblers suffering from gambling problems and their close relations

Activity SS-2.2 Use of the Gambling: Help and Referral helpline

Activity SS-2.3 Websites intended for gamblers suffering from gambling problems and their close relations

Activity SS-2.4 Number of resources that offer front-line services to individuals with gambling problems

Activity SS-2.5 Number of individuals subject to front-line intervention in respect of a gambling problem

Activity SS-2.6 Number of weekly group meetings offered by self-help movements to individuals suffering from gambling-related problems

Activity SS-2.7 Number of resources that offer treatment services for individuals suffering from a gambling-related disorder

Activity SS-2.8 Proportion of users, among gamblers receiving treatment, who display an online gambling-related disorder

Finding SS-2 Reduction in the initiation of minors to online gambling

Finding SS-2.1 Participation rate by minors in online gambling

Finding SS-3 Reduction in at-risk gambling practices among online gamblers

Finding SS-3.1 Days per month with at least one bet on an online gambling site

Finding SS-3.2 Hours spent per month on an online gambling site

Finding SS-3.3 Monthly spending on an online gambling site

Finding SS-4 Reduction in the prevalence of excessive gambling among online gamblers

Finding SS-4.1 Proportion of gamblers at moderate risk among online gamblers

Finding SS-4.2 Proportion of potentially pathological gamblers among online gamblers

Finding SS-5 Reduction in gambling-related problems among online gamblers

Finding SS-5.1 Proportion of online gamblers who reported hazardous alcohol consumption

Finding SS-5.2 Proportion of online gamblers who reported cannabis consumption

Finding SS-5.3 Proportion of online gamblers who reported regular tobacco consumption

Finding SS-5.4 Proportion of online gamblers who reported online gambling-related problems

Finding SS-5.5 Proportion of online gamblers who reported physical or mental health problems

ACTIVITY SS-1.1

LIST OF MEDIA CAMPAIGNS FOCUSING ON THE PREVENTION OF GAMBLING PROBLEMS

DEFINITION

List of media campaigns focusing on the prevention of gambling problems. The campaigns and activities cover an array of gambling-related topics such as risk factors, the consequences of gambling, the recognition problems, and responsible gambling. The activities were either carried out directly by the Ministère de la Santé et des Services sociaux (MSSS) or by the 18 regional public health branches, the INSPQ, non-governmental agencies subsidized by the MSSS, independent, non-profit private organizations, or help centres in health establishments.

UTILIZATION/INTERPRETATION

The description of the campaigns and awareness-raising activities focusing on gambling over the years, starting in the year they were established, recurrence and target public, makes it possible to partly monitor the efforts made at the provincial level to heighten awareness among Quebecers of the problem of gambling.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

INTERNAL DOCUMENTATION, DIRECTION DES DÉPENDANCES ET DE L'ITINÉRANCE

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Annual

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2010-2013

FINDINGS

1.1.1 List of campaigns focusing on gambling

YEAR OF DISSEMINATION	SECTION	SPECIFIC OBJECTIVES	TARGET CLIENTELE
2013	At-risk gamblers	Inform and heighten awareness among Quebecers of gambling aimed at at-risk gamblers by encouraging them to reflect on the place that gambling occupies in their lives.	The adult population of Québec
2012	At-risk gamblers and the people around them (February 13 to March 12)	Inform at-risk groups and those around them of the consequences linked to inappropriate gambling and of the resources available.	The adult population of Québec
2011	The Aboriginal population (February 13 to April 1)	Raise awareness among adults, especially at-risk gamblers and the people around them, of dependency on gambling by illustrating the attendant consequences.	All Aboriginal communities in Québec
	The general population (February 7 to March 20)		The adult population of Québec
	The Aboriginal population (January 24 to March 27)		All Aboriginal communities in Québec
2010	The general population (February 15 to March 21)	Raise consciousness among adults of dependency on gambling by illustrating the attendant consequences.	The adult population of Québec
	The Aboriginal population (January 25 to February 28)		All Aboriginal communities in Québec

HIGHLIGHTS

- Several campaigns devoted to gambling were carried out between 2010 and 2012 but none of them focused on online gambling.

ACTIVITY SS-1.2 BUDGET ALLOCATED TO INFORMATION AND AWARENESS-RAISING CAMPAIGNS DEVOTED TO GAMBLING

DEFINITION

The total annual budget allocated to information and awareness-raising campaigns aimed at adults and devoted to gambling.

UTILIZATION/INTERPRETATION

The annual budget earmarked for campaigns focusing on gambling is a status-information indicator that makes it possible to establish changes over time in investments in information and awareness-raising campaigns devoted to gambling.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

INTERNAL DOCUMENTATION, DIRECTION DES DÉPENDANCES ET DE L'ITINÉRANCE

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Annual

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009-2010 to 2011-2012

FINDINGS

1.2.1 Budget allocated to information and awareness-raising campaigns devoted to gambling

FISCAL YEAR	BUDGET ALLOCATED
2011-2012	\$1 050 000
2010-2011	\$1 050 000
2009-2010	\$1 500 000

HIGHLIGHTS

- The budget allocated to information and awareness-raising campaigns devoted to gambling declined by 30% between 2009-2010 and 2011-2012, from \$1 500 000 to \$1 050 000.
- No campaign focused specifically on online gambling.

ACTIVITY SS-2.1

TELEPHONE LINES INTENDED FOR GAMBLERS SUFFERING FROM GAMBLING PROBLEMS AND THEIR CLOSE RELATIONS

DEFINITION

Telephone lines intended for gamblers suffering from gambling problems and their close relations.

INTERPRETATION

The list of telephone resources makes it possible to examine the importance accorded gambling-related problems and to monitor the efforts made at the provincial level to help and support individuals grappling with a gambling-related problem and their close relations.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE MSSS DIRECTORY OF RESOURCES

www.dependances.gouv.qc.ca/index.php?aide_en_ligne

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

DATA AVAILABLE

Ongoing

FINDINGS

2.1.1 Telephone lines intended for gamblers suffering from gambling problems and their close relations

RESOURCE	NUMBER	SCHEDULE	DESCRIPTION
Gambling: Help and Referral	1-800-461-0140 In the Montréal area: 514-527-0140	24 hours a day, seven days a week	An information, support and referral helpline for pathological gamblers and their close relations

HIGHLIGHTS

- In Québec there is a telephone helpline intended for individuals suffering from gambling-related problems and their close relations.

ACTIVITY SS-2.2 USE OF THE GAMBLING: HELP AND REFERRAL HELPLINE

DEFINITION

The number of telephone calls handled by the Gambling: Help and Referral helpline.

INTERPRETATION

The number of telephone calls handled by the Gambling: Help and Referral helpline is a status-information indicator. Annual changes in the number of calls reveals the fluctuation in the number of early interventions carried out in respect of gambling behaviour among Quebecers who resorted to this front-line intervention service.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE GAMBLING: HELP AND REFERRAL WEBSITE

www.jeu-aidereference.qc.ca/www./statistiques_fr.asp

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Annual

LEVEL OF REPRESENTATIVENESS

Provincial and regional

DATA AVAILABLE

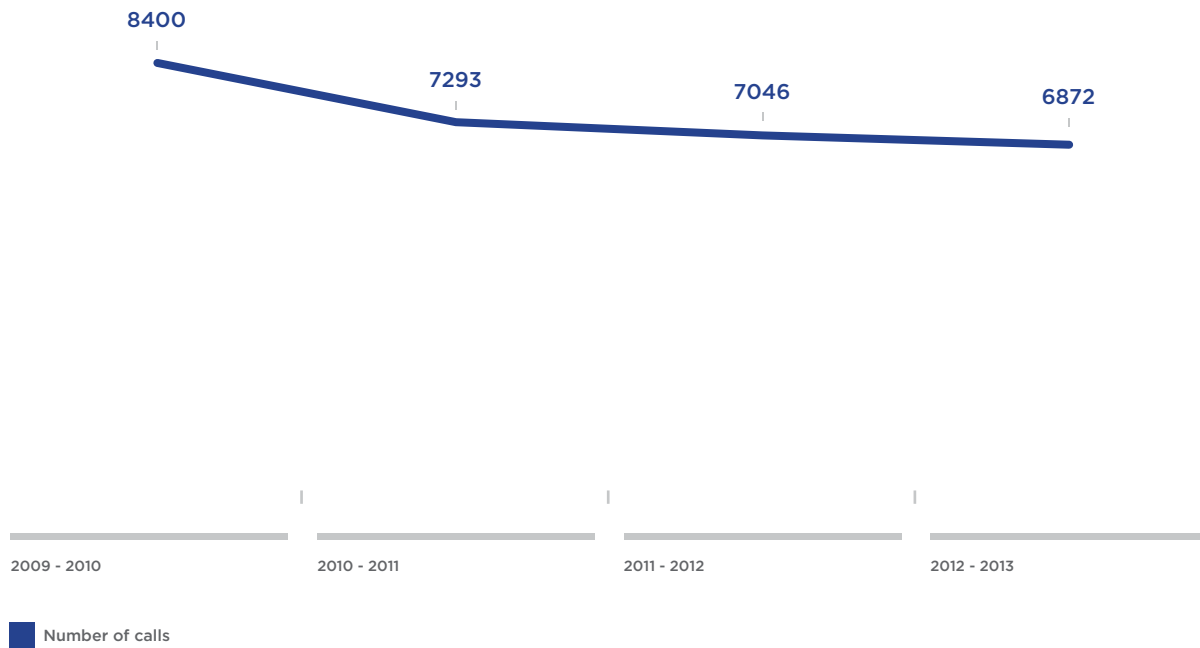
April 1, 2009 to March 31, 2013

REMARKS

- The data presented include individuals who call on their own behalf or for someone close to them and who request advice and support, general information on problem gambling, rehabilitation and counselling services, mutual-aid groups or other related requests such as resources for budget consultations, problems related to violence, drug addiction or suicide.
- The data do not distinguish between requests concerning online gambling and those regarding landbased gambling.

FINDINGS

2.2.1 Number of telephone calls handled by the Gambling: Help and Referral helpline



HIGHLIGHTS

- Between 2009-2010 and 2012-2013, the number of calls fell by 18%, from 8400 to 6872.

ACTIVITY SS-2.3

WEBSITES INTENDED FOR GAMBLERS SUFFERING FROM GAMBLING PROBLEMS AND THEIR CLOSE RELATIONS

DEFINITION

Websites intended for gamblers suffering from gambling problems and their close relations.

INTERPRETATION

The list of online resources makes it possible to examine the importance accorded the phenomenon and monitor efforts made at the provincial level to help and support individuals suffering from gambling problems and their close relations.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE MSSS DIRECTORY OF RESOURCES

www.dependances.gouv.qc.ca/index.php?aide_en_ligne

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

DATA AVAILABLE

Ongoing

FINDINGS

2.3.1 List of online resources available to at-risk gamblers and their close relations

RESOURCE	WEBSITE	DESCRIPTION
Gambling: Help and Referral	jeu-aidereference.qc.ca	An information, support and referral helpline for pathological gamblers and their close relations

HIGHLIGHTS

- In Québec there is an online resource intended to inform, heighten awareness among, refer and support individuals suffering from gambling-related problems and their close relations.
- No online resource is specifically dedicated to the problem of online gambling.

ACTIVITY SS-2.4

NUMBER OF RESOURCES THAT OFFER FRONT-LINE SERVICES TO INDIVIDUALS WITH GAMBLING PROBLEMS

DEFINITION

The number of resources that offer front-line services to individuals with gambling problems.

OPERATIONALIZATION

Many health and social services centres (CSSS) (or regional health and social services centres, CRSSS) that treat various clientele engage in the detection of cases and early intervention, refer individuals deemed to be probable pathological gamblers to dependency rehabilitation centres (CRDs) for specialized evaluation, and offer support to the people around the gamblers and the community.

INTERPRETATION

The number of CSSSs (or CRSSSs) that offer front-line services to individuals with gambling problems is a status-information indicator. It makes it possible to establish change over time in the coverage of front-line service offerings in each region of Québec.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE MSSS DIRECTORY OF RESOURCES

www.msss.gouv.qc.ca/reseau/rls/pdf/liste_des_CSSS.pdf

THE WEBSITE OF THE CENTRE RÉGIONAL DE SANTÉ ET DE SERVICES SOCIAUX DE LA BAIE-JAMES

www.crsssbaiejames.gouv.qc.ca/1/accueil.crsssbaiejames

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

Provincial et régional

DATA AVAILABLE

Since 2013

REMARKS

- The services offered by the resources are intended for gamblers and the people around them, regardless of the type or mode of gambling, i.e. landbased or online.

FINDINGS

2.4.1 Number of resources that offer front-line services to individuals with gambling problems

SOCIO-SANITARY REGION	2013
Bas-Saint-Laurent	8
Saguenay	6
Québec	4
Mauricie-Centre-du-Québec	8
Estrie	7
Montréal	12
Outaouais	5
Abitibi	5
Côte-Nord	8
Nord-du-Québec	1
Gaspésie-Les Îles	5
Chaudière-Appalaches	5
Laval	1
Lanaudière	2
Laurentides	7
Montérégie	11
Total	95

HIGHLIGHTS

- Front-line services are accessible in all regions of Québec.

ACTIVITY SS-2.5 NUMBER OF INDIVIDUALS SUBJECT TO FRONT-LINE INTERVENTION IN RESPECT OF A GAMBLING PROBLEM

DEFINITION

The number of individuals subject to one or more interventions in a CSSS for a gambling problem.

OPERATIONALIZATION

The number of individuals subject to one or more interventions in a CSSS for a standardized reason corresponding to the pathological gambling.

INTERPRETATION

The number of individuals subject to one or more interventions in a CSSS for a gambling problem is a status-information indicator. The annual change reveals the fluctuation in the number of people involved in early interventions.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

I-CLSC

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

LEVEL OF REPRESENTATIVENESS

Users of CSSS front-line services

DATA AVAILABLE

None

METHODOLOGICAL REFERENCES ON THE DATA

Normative framework of the information system on the clientele and CLSC services (I-CLSC) Version 1

REFERENCES TO THE I-CLSC NORMATIVE FRAMEWORK

CHAPTER	ELEMENT
Chapter 3 - Description of the elements	Element 034 - Reasons for the intervention:
Subsection 3.3.6 - Intervention	*4206: pathological gambling
Subsection 3.3.1 - Request for standardized services	Element 032 - Date of the intervention
Subsection 3.3.3 - User-individual	Element 101 - Number of the request for service
	Element 014 - Date of birth
	Element 015 - Sex
	Element 021 - CSSS territory code of the usual place of residence

REMARKS

- Among the individuals subject to an intervention for a gambling problem, the I-CLSC clientele information system and its normative framework do not make it possible to determine the individuals in respect of whom online gambling was part of the problem.

FINDINGS

The findings were not available at the time of publication.

ACTIVITY SS-2.6

NUMBER OF WEEKLY GROUP MEETINGS OFFERED BY SELF-HELP MOVEMENTS TO INDIVIDUALS SUFFERING FROM GAMBLING-RELATED PROBLEMS

DEFINITION

The number of weekly group meetings offered free of charge by self-help movements to individuals suffering from gambling-related problems.

OPERATIONALIZATION

The number of weekly group meetings noted on the Gamblers anonymes (www.gaquebec.org) and Joueurs anonymes (www.ja-quebec.com) websites.

INTERPRETATION

The number of weekly group meetings offered by self-help movements is a status-information indicator that makes it possible to determine changes over time in the availability of group meetings offered to individuals suffering from online gambling-related problems.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE GAMBLERS ANONYMES AND JOUEURS ANONYMES WEBSITES

www.gaquebec.org and www.ja-quebec.com

AGENCIES RESPONSIBLE

Gamblers anonymes and Joueurs anonymes

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

Provincial and regional

DATA AVAILABLE

Ongoing

REMARKS

- The self-help groups offer free of charge help to individuals suffering from gambling-related problems regardless of the type or mode of gambling, i.e. landbased or online.

FINDINGS

2.6.1 Number of weekly meetings accessible in gambling self-help groups in each region of Québec

Region of Québec	Number of meetings of Gamblers anonymes accessible per week in 2013	Number of meetings of Joueurs anonymes accessible per week in 2013	Total
Bas-Saint-Laurent	0	-	0
Saguenay	4	-	4
Québec	3	1	4
Mauricie-Centre-du-Québec	7	-	7
Estrie	1	-	1
Montréal	34	-	34
Outaouais	1	-	1
Abitibi	1	-	1
Côte-Nord	1	-	1
Nord-du-Québec	0	-	0
Gaspésie-Les Îles	0	-	0
Chaudière-Appalaches	1	1	2
Laval	3	-	3
Lanaudière	5	-	5
Laurentide	4	-	4
Montérégie	18	-	18
Total	83	2	85

HIGHLIGHTS

- Weekly group meetings offered by self-help movements are available in 13 of 16 regions in Québec.
- Depending on the region, the number of weekly group meetings available ranges from one to 34.

ACTIVITY SS-2.7

NUMBER OF RESOURCES THAT OFFER TREATMENT SERVICES FOR INDIVIDUALS SUFFERING FROM A GAMBLING-RELATED DISORDER

DEFINITION

The number of resources that offer treatment services for individuals suffering from a gambling-related disorder.

OPERATIONALIZATION

The number of public private and community resources that are certified or are in the process of being certified registered in the MSSS's dependency resource directory that offer specialized rehabilitation, accommodation, help and support services to individuals suffering from a gambling-related disorder in each of Québec's socio-sanitary regions.

INTERPRETATION

The number of resources recognized by the MSSS that offer specialized treatment or accommodation services, help and support to individuals suffering from a gambling-related disorder is a status-information indicator. It makes it possible to determine changes over time in offerings of recognized treatment among individuals displaying a gambling-related disorder as an indicator of the ability of different regions to satisfy such individuals' treatment needs.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE MSSS DIRECTORY OF RESOURCES

www.dependances.gouv.qc.ca/index.php?repertoire_des_ressources_dependance

AGENCY RESPONSIBLE

Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

Provincial and regional

DATA AVAILABLE

Since 2011

REMARKS

- The services that the resources offer treat the gambling-related disorder, regardless of the type or mode of gambling, i.e. landbased or online.

FINDINGS

2.7.1 Number of resources that offer services to individuals displaying a gambling-related disorder

Socio-sanitary region	Public resources			Private or community resources that are certified or in the processing of being certified		
	2011	2012	2013	2011	2012	2013
Bas-Saint-Laurent	1	1	1	1	1	2
Saguenay	1	1	1	2	2	2
Québec	1	1	1	2	1	3
Mauricie-Centre-du-Québec	1	1	1	5	4	5
Estrie	1	1	1	0	2	2
Montréal	1	1	1	4	3	3
Outaouais	1	1	1	1	2	1
Abitibi	1	1	1	0	0	0
Côte-Nord	1	1	1	0	0	0
Nord-du-Québec	1	1	1	0	0	0
Gaspésie-Les Îles	1	1	1	0	0	0
Chaudière-Appalaches	2	2	2	2	2	2
Laval	1	1	1	0	0	1
Lanaudière	1	1	1	1	2	2
Laurentides	1	1	1	4	2	1
Montérégie	2	2	2	2	1	2
Total	18	18	18	24	23	26

HIGHLIGHTS

- Public resources are available in all regions of Québec. Private resources are available in 12 out of 16 regions.

ACTIVITY SS-2.8 PROPORTION OF USERS, AMONG GAMBLERS RECEIVING TREATMENT, WHO DISPLAY AN ONLINE GAMBLING-RELATED DISORDER

DEFINITION

The number of users receiving treatment whose specialized assessment reveals an online gambling-related disorder.

OPERATIONALIZATION

Number of users who have undertaken treatment for an online gambling-related disorder



A sample of gamblers receiving treatment

INTERPRETATION

The proportion of users, among gamblers receiving treatment in a CRD, who display an online gambling-related disorder is a status-information indicator. A knowledge of this proportion makes it possible to estimate the relative weight of the online gambling-related disorder among the gamblers who resort to treatment services in CRDs in Québec.

UNIVERSE

Gamblers receiving treatment in CRDs in Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

THE DEPENDENCY REHABILITATION SERVICES CLIENT INFORMATION SYSTEM (SIC-SRD)

AGENCIES RESPONSIBLE

CRD and Ministère de la Santé et des Services sociaux du Québec

POPULATION TARGETED

Gamblers receiving treatment

PERIODICITY

April 1, 2012 to March 31, 2013, then on an annual cycle

LEVEL OF REPRESENTATIVENESS

Population of users in dependency rehabilitation centres in Québec

DATA AVAILABLE

2012-2013

METHODOLOGICAL REFERENCES ON THE DATA

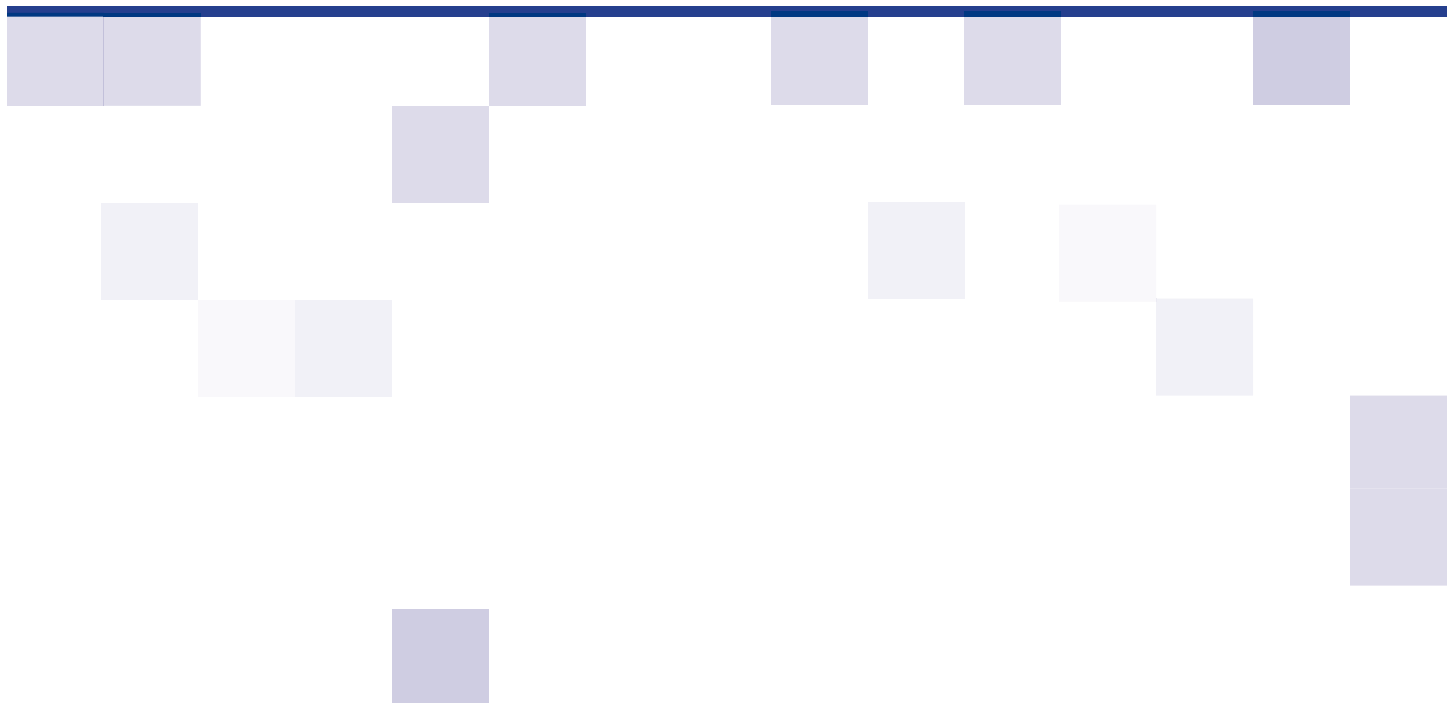
The dependency rehabilitation services client information system (SIC-SRD), Version 1.0, November 2010

REFERENCES TO THE I-CLSC NORMATIVE FRAMEWORK

CHAPTER	ELEMENTS
Chapter 3 - Description of the elements Section 3.3 - Description of each element Subsection - 3.3.7 Dependency	Element 101 - Type of dependency: 360 Internet *361 Poker excluding poker played in a casino (315) and poker played elsewhere (see heading 370) *362 Casino

REMARKS

- It is estimated that roughly 45% of incomplete files are not accounted for in the data presented. This estimate is based on cross-referencing of information provided by the CRDs and the MSSS.



FINDINGS

2.8.1 Proportion of users, among gamblers receiving treatment, who display an online gambling-related disorder

Socio-sanitary region	Sample of gamblers receiving treatment	Number of gamblers who undertook treatment for a gambling-related disorder	Proportion of users, among the gamblers receiving treatment, who display an online gambling problem
Bas-Saint-Laurent	11	1	9.1%
Saguenay	59	5	8.5%
Québec	130	11	8.5%
Mauricie-Centre-du-Québec	78	8	10.3%
Estrie	39	6	15.4%
Montréal	107	6	5.6%
Outaouais	71	3	4.2%
Abitibi	17	1	5.9%
Côte-Nord	8	1	12.5%
Nord-du-Québec	0	0	-
Gaspésie-Les Îles	8	1	12.5%
Chaudière-Appalaches	60	3	5.0%
Laval	40	1	2.5%
Lanaudière	70	2	2.9%
Laurentides	84	10	11.9%
Montérégie	301	18	6.0%
Total	1084	77	7.1%

HIGHLIGHTS

- In a sample of 1084 gamblers receiving treatment for a gambling-related disorder and in respect of whom a specialized evaluation was completed, 7.1% displayed an online gambling-related disorder.
 - Depending on the region, this proportion ranges from 2.5% (Laval) to 15.4% (Estrie).
-

FINDING SS-2 REDUCTION IN THE INITIATION OF MINORS TO ONLINE GAMBLING

FINDING SS-2.1 PARTICIPATION RATE BY MINORS IN ONLINE GAMBLING

DEFINITION

The ratio of the number of Québec adolescents who placed at least one bet on an online gambling website to the adolescent population of Québec.

OPERATIONALIZATION

Number of Québec secondary school students who bet money on online games in the preceding 12 months



Total sample (representative of the population of Québec secondary school students)

INTERPRETATION

This indicator reveals the proportion of Québec adolescents who made at least one bet on an online gambling website during the preceding 12 months

UNIVERSE

The adolescent population of Québec (students in Secondary 1, 2, 3, 4 and 5)

MAIN SOURCES OF POPULATION-BASED DATA

ENQUÊTE CHEZ LES ÉLÈVES DU SECONDAIRE

AGENCY RESPONSIBLE

Institut de la statistique du Québec

POPULATION TARGETED

Secondary 1, 2, 3, 4 and 5 students

PERIODICITY

Initial data in 2002 and subsequently on a two-year cycle

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

Annual data (2002, 2004, 2006, 2008)

METHODOLOGICAL REFERENCES ON THE DATA

Institut de la statistique du Québec, *Enquête québécoise sur le tabagisme chez les élèves du secondaire, 2002* and *Enquête québécoise sur la tabac, l'alcool, la drogue et le jeu chez les élèves du secondaire, de 2004 à 2008*.

RELATED QUESTIONS

ENQUÊTE CHEZ LES ÉLÈVES DU SECONDAIRE (ISQ)

2008 / 65

Have you bet on online games over the past 12 months?

2008 / 67

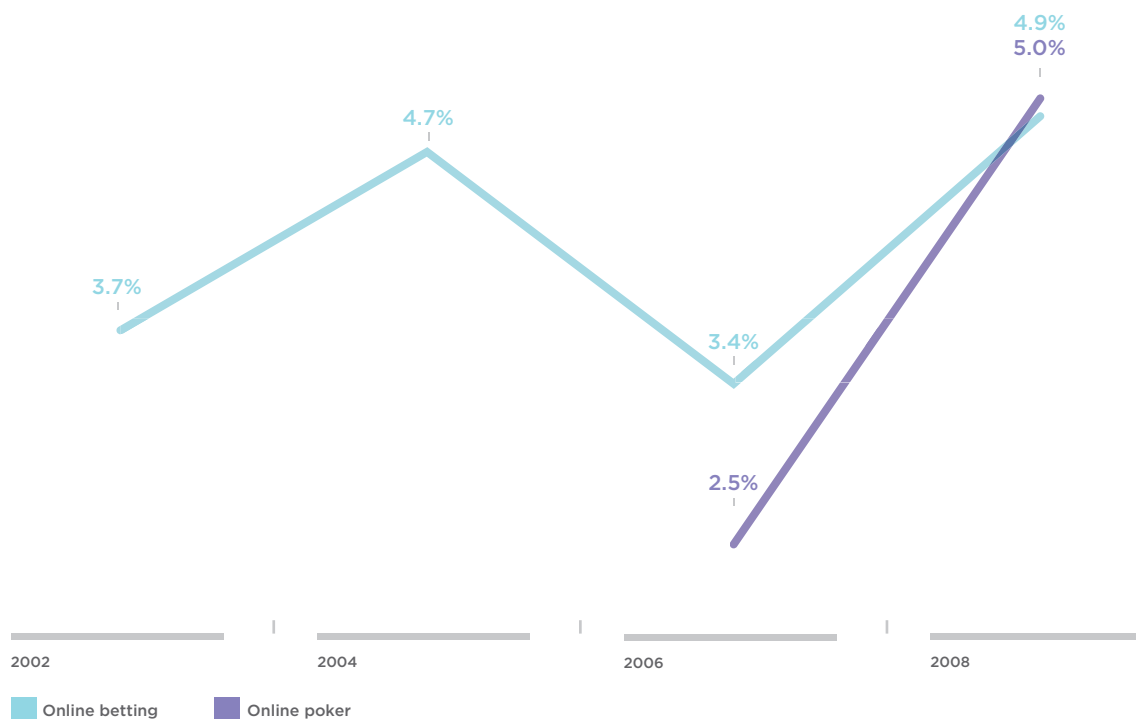
Over the past 12 months, how often have you bet money on online poker games?

- Never
- Just once to try it
- Less than once a month
- Roughly once a month
- On the weekend OR once or twice per week
- Three or more times per week, BUT not every day
- Every day

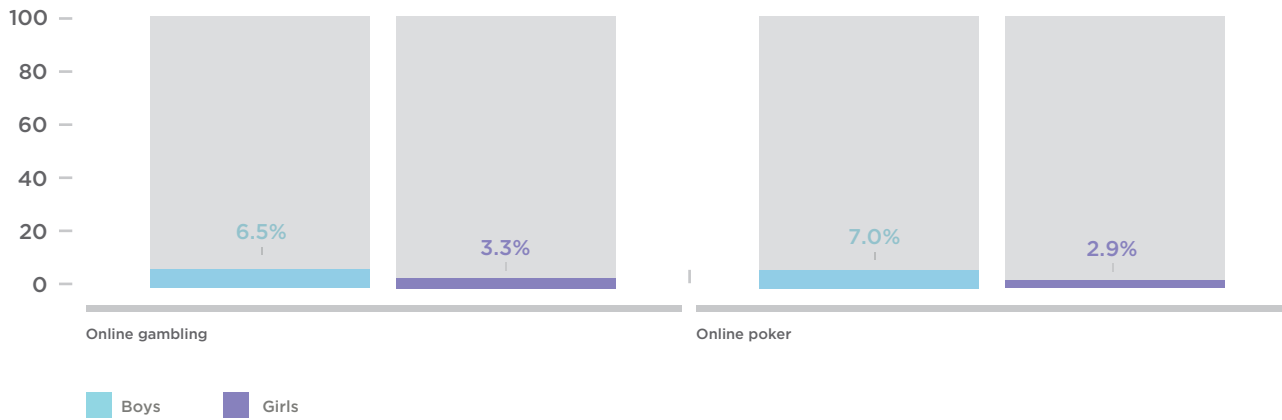
FINDINGS

ENQUÊTE CHEZ LES ÉLÈVES DU SECONDAIRE (ISQ)

2.1.1 Prevalence of participation by minors in online gambling between 2002 and 2008



2.1.2 Prevalence of participation by minors in online gambling, by type, in 2008



HIGHLIGHTS

- Since 2002, the participation rate by students in online betting has fluctuated significantly from one survey to the next, from 3.7% in 2002, to 4.7% in 2004, to 3.4% in 2006 and then to 4.9% in 2008.
- Participation in online poker rose significantly between 2006 and 2008, from 2.5% to 5%.
- Boys are, relatively speaking, more numerous than girls in betting and playing poker online.

RESULT SS-3 REDUCTION IN AT-RISK GAMBLING PRACTICES AMONG ONLINE GAMBLERS

RESULT SS-3.1 DAYS PER MONTH WITH AT LEAST ONE BET ON AN ONLINE GAMBLING SITE

DEFINITION

The monthly frequency at which Québec adult gamblers participate in online gambling.

OPERATIONALIZATION

ESPACEJEUX

Number of days with at least one bet on Espacejeux during a given quarter divided by three.

ENHJEU-QUÉBEC

2009 - Poker

Number of times per month that a gambler bet money on an online poker website

2012 - Poker / Table games / Sports betting / Cyber-lottery

Number of times per month that a gambler bet money on an online poker website

Number of times per month than a gambler bet money on an online table game website

Number of times per month that a gambler bet money on an online sports betting website

Number of times per month that a gambler bet money on an online cyber-lottery website

PRESENTATION OF THE DATA

The percentiles on the population of gamblers are arranged in ascending order, i.e. from the gambler who plays the least number of days per month to the one who plays the greatest number. The first quartile relates to the value of frequency of gambling that separates the first 25% of the population of gamblers from the remaining 75%. The second quartile (commonly called the median) indicates the value of frequency of gambling separating the first 50% of the population of gamblers from the remaining 50%. The third quartile indicates the value of frequency of gambling separating the first 75% of the population of gamblers from the remaining 25%. Lastly, the 99th centile indicates the value of frequency of gambling separating the first 99% of the population of gamblers from the remaining 1%. In other words, the value of the average number of days devoted monthly to online gambling in the 99th centile is higher than what 99% of the gamblers would obtain.

INTERPRETATION

An increase in the number of hours spent monthly participating in online gambling can indicate an intensification of participation in online gambling by the population.

UNIVERSE

ESPACEJEUX

Individuals registered on the Espacejeux website

ENHJEU-QUÉBEC 2009

Cash game online poker players in the adult population of Québec

ENHJEU-QUÉBEC 2012

Cash game poker, table games, online sports betting and cyber-lottery players in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently on a three-month cycle

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

MAIN SOURCES OF POPULATION-BASED DATA

ENJHEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009 / POK_Q13

During the preceding 12 months, how many times (per week) (per month) (per year) have you bet or spent money playing online cash game poker?

2012 / INT_POK_Q1, INT_TAB_Q2, INT_SPO_Q2

During the preceding 12 months, have many times (per week) (per month) (per year) have you bet or spent money (1) playing cash game online poker; (2) playing online table games; (3) engaging in online sports betting; (4) playing cyber-lottery?

REMARKS

ESPACEJEUX

- Espacejeux officially launched its operations on December 1, 2010.
- On March 26, 2012, it launched a sports betting offering.
- On August 27, 2012, it allowed online lottery purchases.
- The “overall” findings include casino gambling, poker, sports betting and lottery data.

ENHJEU-QUÉBEC

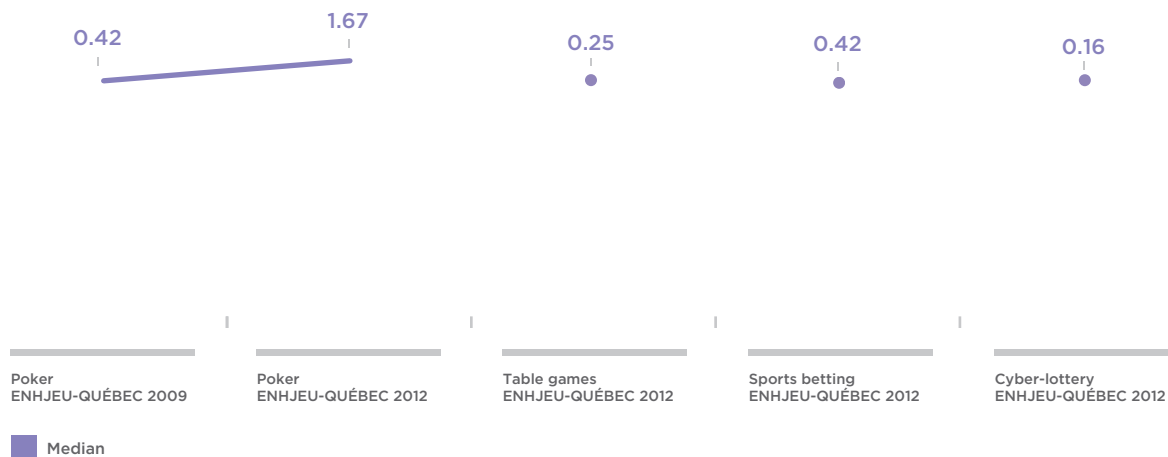
- The data reflect the monthly frequency of online gambling both on the Espacejeux website and on any website accessible to Quebecers.
- Survey respondents were asked to indicate the number of “times” rather than the number of “days” per month when they made at least one bet on an online gambling website.
- The data are self-reported.



FINDINGS

ENJHEU-QUÉBEC 2009 AND 2012

3.1.8 Days per month with at least one bet on a poker, table game, sports betting or cyber-lottery website in 2009 and 2012





HIGHLIGHTS

- The number of days per month on which gamblers placed at least one bet on Espacejeux has remained stable since the website was launched.
- The median number of days per month on which gamblers placed at least one bet on Espacejeux is slightly higher among women than among men.
- The median number of days per month on which gamblers placed one bet on Espacejeux increases with age. However, the differences between the age groups appear to decrease over the periods of time analyzed.
- The profiles are more or less the same depending on the type of gambling, except for lotteries, in respect of which the average number of days per month on which gamblers made at least one bet is lower.
- In 2009, in the adult population of Québec, the median number of days on which gamblers placed at least one bet on an online poker website was estimated at 0.4. In 2012, the figure increased to 1.7 days per month in the case of poker and an estimated 0.3 for other casino games, 0.4 for sports betting, and 0.2 for cyber-lotteries.

FINDING SS-3.2 HOURS SPENT PER MONTH ON AN ONLINE GAMBLING SITE

DEFINITION

The number of hours that adult Québec gamblers spend monthly participating in online gambling.

OPERATIONALIZATION

ESPACEJEUX

The number of hours spent on Espacejeux during a given quarter

ENHJEU-QUÉBEC

2009 - Poker

Number of hours that a gambler usually spent betting money on online cash game poker



monthly frequency of gambling

2012 - Poker / Table games

Number of hours that a gambler usually spent betting money on online cash game poker



monthly frequency of gambling

Number of hours that a gambler usually spent betting money on online table games



monthly frequency of gambling

PRESENTATION OF THE DATA

The percentiles on the population of gamblers are arranged in ascending order, i.e. from the gambler who plays the least number of hours per month to the one who plays the greatest number. The first quartile relates to the value of the number of hours separating the first 25% of the population of gamblers from the remaining 75%. The second quartile (commonly called the median) indicates the value of the number of hours separating the first 50% of the population of gamblers from the remaining 50%. The third quartile indicates the value of the number of hours separating the first 75% of the population of gamblers from the remaining 25%. Lastly, the 99th centile indicates the value of the number of hours separating the first 99% of the population of gamblers from the remaining 1%. In other words, the value of the average number of hours devoted monthly to online gambling in the 99th centile is higher than what 99% of the gamblers would obtain.

UTILIZATION/INTERPRETATION

An increase in the monthly frequency can indicate an intensification of participation in online gambling by the population.

UNIVERSE

ESPACEJEUX

Individuals registered on the Espacejeux website

ENHJEU-QUÉBEC 2009

Adult Québec online cash game poker players

ENHJEU-QUÉBEC 2012

Adult Québec online cash game poker or table game players

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently in a three-month cycle

LEVEL OF REPRESENTATIVENESS

Adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

MAIN SOURCES OF POPULATION-BASED DATA

ENJHEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009 / POK_Q14

How many minutes or hours do you usually spend betting or spending money on online cash game poker?

2012 / INT_POK_Q2, INT_TAB_Q3

How many minutes or hours do you usually spend when you bet or spend money on online (1) cash game poker; (2) table games?

REMARKS

ESPACEJEUX

- The findings focus solely on casino gambling data.

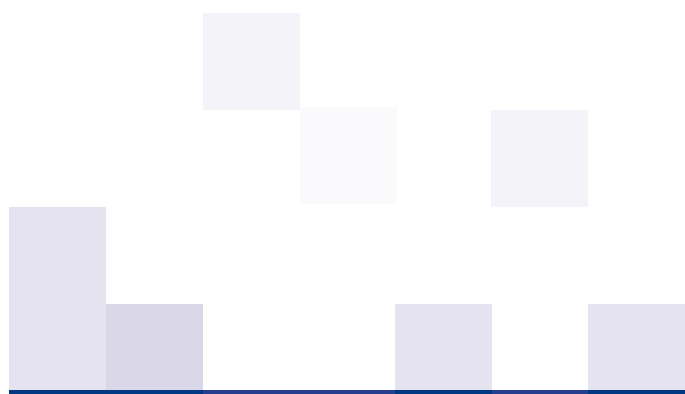
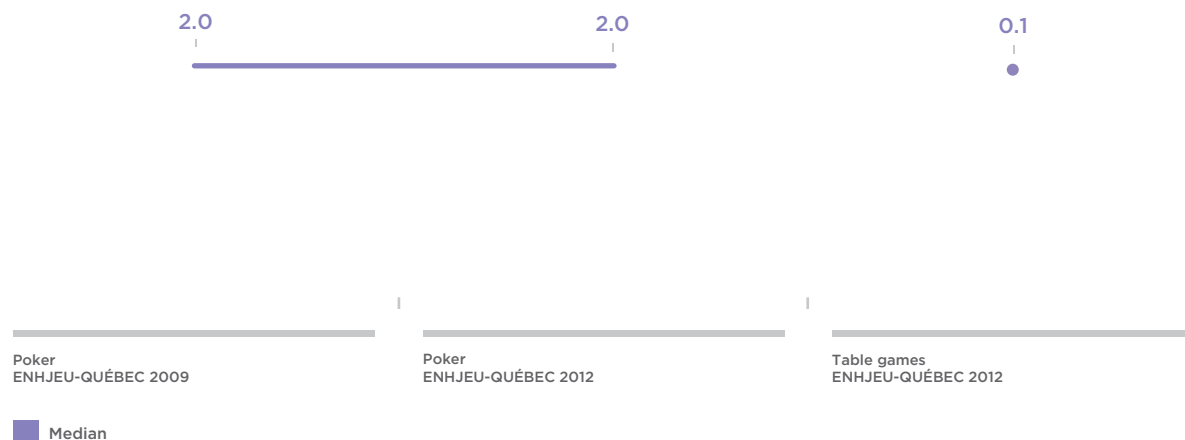
ENHJEU-QUÉBEC

- The data reflect the average number of hours per month spent gambling both on the Espacejeux website and on any website accessible to Quebecers.
- The data are self-reported.

FINDINGS

ENHJEU-QUÉBEC 2009-2012

3.2.4 Hours spent per month on a poker or table game website in 2009 and 2012



HIGHLIGHTS

- The average number of hours spent on the Espacejeux website has tended to increase since the website was launched.
- The median number of hours spent on the Espacejeux website is higher among women than among men.
- The median number of hours spent on the Espacejeux website increases according to the age group.
- In 2009, the adult population of Québec spent an estimated two hours per month on an online poker website. In 2012, the figure remained unchanged and was estimated at 0.1 hour (six minutes) per month in the case of online table games.

FINDING SS-3.3 MONTHLY SPENDING ON AN ONLINE GAMBLING SITE

DEFINITION

The amount of money that Québec adult gamblers spend monthly on online gambling websites.

OPERATIONALIZATION

ESPACEJEUX

The amount of money spent on the Espacejeux website during a given quarter

ENHJEU-QUÉBEC

2009 - Poker

The amount of money spent per month by a gambler on an online poker website

2012 - Poker / Table games / Sports betting / Cyber-lotteries

The amount of money spent per month by a gambler on an online poker website

The amount of money spent per month by a gambler on an online table game website

The amount of money spent per month by a gambler on an online sports betting website

The amount of money spent per month by a gambler on an online cyber-lottery website

PRESENTATION OF THE DATA

The percentiles on the population of gamblers are arranged in ascending order, i.e. from the gambler who plays the least number of hours per month to the one who plays the greatest number. The first quartile relates to the value of the number of hours separating the first 25% of the population of gamblers from the remaining 75%. The second quartile (commonly called the median) indicates the value of the number of hours separating the first 50% of the population of gamblers from the remaining 50%. The third quartile indicates the value of the number of hours separating the first 75% of the population of gamblers from the remaining 25%. Lastly, the 99th centile indicates the value of the number of hours separating the first 99% of the population of gamblers from the remaining 1%. In other words, the value of the average number of hours devoted monthly to online gambling in the 99th centile is higher than what 99% of the gamblers would obtain.

UTILIZATION/INTERPRETATION

An increase in the amounts of money spent monthly can indicate the intensification of participation in online gambling in the adult population of Québec.

UNIVERSE

ESPACEJEUX

Individuals registered on the Espacejeux website

ENHJEU-QUÉBEC 2009

Online cash game poker players in the adult population of Québec

ENHJEU-QUÉBEC 2012

Online cash game poker, table game, sports betting or cyber-lottery players in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently in a three-month cycle

LEVEL OF REPRESENTATIVENESS

Adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

MAIN SOURCES OF POPULATION-BASED DATA

ENJHEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009 / POK_Q15

How much money do you usually spend when you bet or spend money on online cash game poker? Please indicate your average expense per occasion, per week, per month or per year.

2012 / INT_POK_Q3, INT_TAB_Q4, INT_SPO_Q3, LOT_Q1e1

How much money do you usually spend when you bet or spend money on:

- (1) online cash game poker?
- (2) online table games?
- (3) online sports betting?
- (4) cyber-lotteries?

Please indicate to me your average expense per occasion, per week, per month or per year.

REMARKS

ESPACEJEUX

- The Espacejeux website officially launched its operations on December 1, 2010.
- On March 26, 2012, it offered sports betting.
- On August 27, 2012, it allowed online lottery purchases.
- The “overall” findings include data on casino gambling, poker, sports betting and lotteries.

ENHJEU-QUÉBEC

- The data reflect the amount of money spent on online gambling both on the Espacejeux website and on any website accessible to Quebecers.
- The data are self-reported.

FINDINGS

ENHJEU-QUÉBEC 2009 AND 2012

3.3.8 Amount of money spent per month on an online poker, table game, sports betting or cyber-lottery website in 2009 and 2012



HIGHLIGHTS

- The amount of money spent per month on the Espacejeux website since it was launched has increased among the smallest gamblers and remained relatively stable among the biggest gamblers.
- The median of the amount of money spent per month on the Espacejeux website is higher among women than among men.
- The median of the amount of money spent per month on the Espacejeux website is the highest in the 25 to 44 age group.
- The median of the amount of money spent per month varies very little according to the type of gambling.
- In 2009 in the adult population of Québec, the estimated median of monthly spending on an online poker website was \$20. In 2012, the figure fell to slightly less than \$17 in the case of poker and an estimated \$4 and \$17, respectively, as regards casino gambling and sports betting, and \$17 for cyber-lotteries.

FINDING SS-4 REDUCTION IN THE PREVALENCE OF EXCESSIVE GAMBLING AMONG ONLINE GAMBLERS

FINDING SS-4.1 PROPORTION OF GAMBLERS AT MODERATE RISK AMONG ONLINE GAMBLERS

DEFINITION

The ratio of the number of online gamblers at moderate risk to the population of online gamblers in Québec.

OPERATIONALIZATION

The number of online gamblers who obtained a score of between 3 and 7 on the Canadian Problem Gambling Index (CPGI) during the preceding 12 months



The number of online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The prevalence of moderate-risk gambling is a status-information indicator that indicates the harmfulness of online gambling.

UNIVERSE

Online gamblers in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

REMARKS

- A recent validation study of the CPGI concludes that there is a considerable difference between gamblers at moderate risk and potentially pathological gamblers in respect of all of the dimensions that the CPGI measures and particularly the dimension related to gambling expenses. The authors recommend that the two categories, i.e. gamblers at moderate risk and potentially pathological gamblers, be analyzed separately and that combining them in a single sub-type is unjustified.

S.R. Currie, D.M. Casey, and D.C. Hodgins (2010). *Improving the psychometric properties of the Problem Gambling Severity Index*. Report submitted to the interprovincial Problem Gambling Research Consortium.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009-2012 / CPGI 1 – CPGI 9

Thinking about the last 12 months...

1. Have you bet more than you could really afford to lose? In other words, do you have the financial capability to gamble the money?
2. Still thinking about the last 12 month, have you needed to gamble with larger amounts of money to get the same feeling of excitement?
3. When you gambled, did you go back another day to try to win back the money you lost? Would you say never, sometimes, most of the time, almost always?
4. Have you borrowed money or sold anything to get money to gamble?

5. Have you felt that you might have a problem with gambling?
6. Has gambling caused you any health problems, including stress or anxiety?
7. Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
8. Has your gambling caused any financial problems for you or your household?
9. Have you felt guilty about the way you gamble or what happens when you gamble?

Never	0
Sometimes	1
Most of the time	2
Almost always	3
Don't know	8
Refuse to answer	9

FINDINGS

4.1.1 Prevalence of moderate-risk gambling among online gamblers

Gamblers at moderate risk	
2009	N ≤ 10
2012	N = 30

HIGHLIGHTS

- The numbers of gamblers at moderate risk are so small that it is impossible to evaluate at the population level the proportion of online gamblers at moderate risk.

RÉSULTAT SS-4 REDUCTION IN THE PREVALENCE OF EXCESSIVE GAMBLING AMONG ONLINE GAMBLERS

RÉSULTAT SS-4.2 PROPORTION OF POTENTIALLY PATHOLOGICAL GAMBLERS AMONG ONLINE GAMBLERS

DEFINITION

The ratio of the number of potentially pathological online gamblers to the population of online gamblers in Québec.

OPERATIONALIZATION

The number of online gamblers who obtained a score of 8 or more on the Canadian Problem Gambling Index (CPGI) during the preceding 12 months



The number of online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The prevalence of moderate-risk gambling is a status-information indicator that indicates the harmfulness of online gambling.

UNIVERSE

Online gamblers in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

REMARKS

- A recent validation study of the CPGI concludes that there is a considerable difference between gamblers at moderate risk and potentially pathological gamblers in respect of all of the dimensions that the CPGI measures and particularly the dimension related to gambling expenses. The authors recommend that the two categories, i.e. gamblers at moderate risk and potentially pathological gamblers, be analyzed separately and that combining them in a single sub-type is unjustified.

S.R. Currie, D.M. Casey, and D.C. Hodgins (2010). *Improving the psychometric properties of the Problem Gambling Severity Index*. Report submitted to the interprovincial Problem Gambling Research Consortium.

2. Still thinking about the last 12 month, have you needed to gamble with larger amounts of money to get the same feeling of excitement?
3. When you gambled, did you go back another day to try to win back the money you lost? Would you say never, sometimes, most of the time, almost always?
4. Have you borrowed money or sold anything to get money to gamble?
5. Have you felt that you might have a problem with gambling?
6. Has gambling caused you any health problems, including stress or anxiety?
7. Have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
8. Has your gambling caused any financial problems for you or your household?
9. Have you felt guilty about the way you gamble or what happens when you gamble?

Never	0
Sometimes	1
Most of the time.....	2
Almost always	3
Don't know	8
Refuse to answer	9

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009-2012 / CPGI 1 - CPGI 9

Thinking about the last 12 months...

1. Have you bet more than you could really afford to lose? In other words, do you have the financial capability to gamble the money?

FINDINGS

4.2.1 Prevalence of potentially pathological gambling among online gambler

Gamblers at moderate risk	
2009	N ≤ 10
2012	N ≤ 10

HIGHLIGHTS

- The numbers of potentially pathological gamblers are so small that it is impossible to evaluate at the population level the proportion of potentially pathological online gamblers.

FINDING SS-5 REDUCTION IN GAMBLING-RELATED PROBLEMS AMONG ONLINE GAMBLERS

FINDING SS-5.1 PROPORTION OF ONLINE GAMBLERS WHO REPORTED HAZARDOUS ALCOHOL CONSUMPTION

DEFINITION

The ratio of the number of adult online gamblers who reported hazardous alcohol consumption to the adult online gambling population in Québec.

OPERATIONALIZATION

The number of adult online gamblers who obtained a score of 8 or more on the AUDIT during the preceding 12 months



The number of adult online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The number of online gamblers who reported hazardous alcohol consumption is a status-information indicator that makes it possible to evaluate the vulnerability of online gamblers in relation to other addictive behaviour.

UNIVERSE

Online gamblers in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009 - 2012 / AUD 1

How often, on average, did you consume alcoholic beverages during the preceding 12 months?

Never	1
Once per month or less	2
Two to four times per month	3
Two to three times per week	4
Four or more times per week	5
Don't know	8
Refuse to answer	9

2009 - 2012 / AUD 2

During the past 12 months, on days that you drank, how many drinks did you have?

Never	1
One or two drinks	2
Three or four drinks	3
Five or six drinks	4
Seven, eight or nine drinks	5
Don't know	8
Refuse to answer	9

2009 - 2012 / AUD 3 - AUD 8

How often do you have five or more drinks on the same occasion?

During the past 12 months, how often have you noticed that you could no longer stop drinking once you had your first drink?

During the past 12 months, how often have you been unable to do what others normally expected you to do because of your alcohol consumption?

During the past 12 months, how often have you needed to have an alcoholic beverage upon waking up the morning after the night before?

During the past 12 months, how often have you felt guilty or remorse after drinking?

During the past 12 months, how often have you been unable to remember what happened the night before because you were drinking?

Never	1
Once per month or less	2
Once per month	3
Once per week	4
Every day or almost every day	5
Don't know	8
Refuse to answer	9

2009 - 2012 / AUD 9 - 10

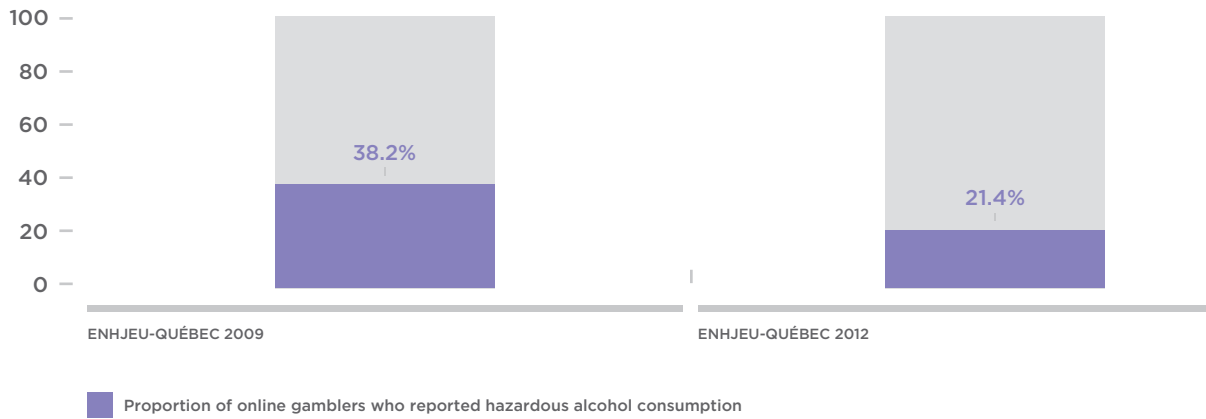
Have you injured yourself or has someone else injured himself following your alcohol consumption?

Has a member of your family, a friend, a physician or another health professional indicated to you his concern about your alcohol consumption or suggested that you reduce your consumption?

No	1
YES, but not during the past 12 months	2
YES, during the past 12 months	3
Don't know	8
Refuse to answer	9

FINDINGS

5.1.1 Proportion of online gamblers who reported hazardous alcohol consumption



HIGHLIGHTS

- The proportion of online gamblers who reported hazardous alcohol consumption fell from 38.2% in 2009 to 21.4% in 2012.
- Nevertheless, an examination of the confidence intervals does not allow us to conclude that there is a statistically significant difference between the 2009 rate and the 2012 rate.

FINDING SS-5 REDUCTION IN GAMBLING-RELATED PROBLEMS
AMONG ONLINE GAMBLERS

FINDING SS-5.2
**PROPORTION OF ONLINE GAMBLERS
WHO REPORTED CANNABIS CONSUMPTION**

DEFINITION

The ratio of the number of adult online gamblers who reported cannabis consumption to the adult online gambling population in Québec.

OPERATIONALIZATION

The number of adult online gamblers who reported cannabis consumption during the preceding 12 months



The number of adult online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The number of online gamblers who reported cannabis consumption is a status-information indicator that makes it possible to evaluate the vulnerability of online gamblers in relation to other addictive behaviour.

UNIVERSE

Online gamblers in the adult population of Québec

**MAIN SOURCES OF
ADMINISTRATIVE DATA**

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009 - 2012 / CANQ1

During your lifetime, have you already tried or consumed marijuana, cannabis or hashish?

Yes	1
No	2
Don't know	8
Refuse to answer	9

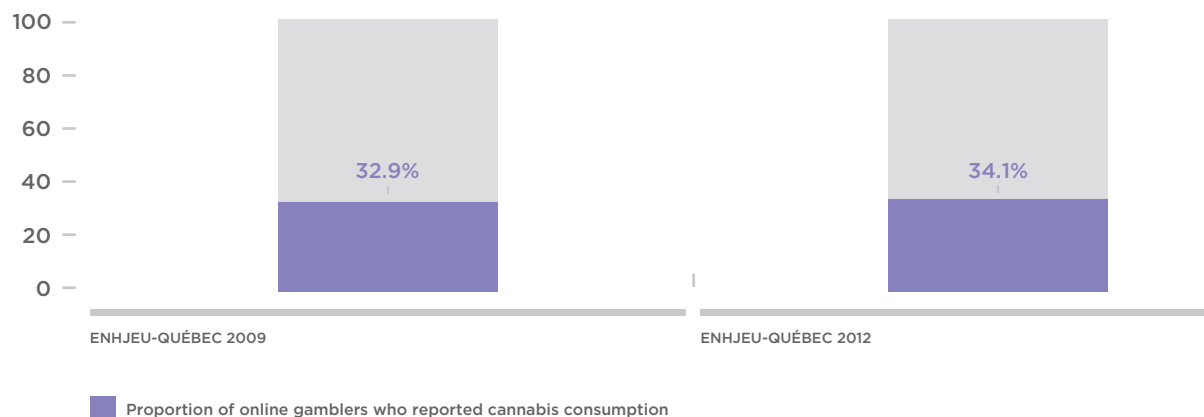
2009 - 2012 / CANQ2/3

During the past 12 months, how often have you used marijuana, cannabis or hashish? Would you say...?

... Never	1
... Once per month or less	2
... Two to four times per month	3
... Two to three times per month	4
... Four times or more per week	6
... Every day	7
Don't know	8
Refuse to answer	9

FINDINGS

5.2.1 Proportion of online gamblers who reported cannabis consumption



HIGHLIGHTS

- The proportion of online gamblers who reported cannabis consumption during the previous year increased from 32.9% in 2009 to 34.1% in 2012.
- Nevertheless, an examination of the confidence intervals does not allow us to conclude that there is a statistically significant difference between the 2009 rate and the 2012 rate.

FINDING SS-5 REDUCTION IN GAMBLING-RELATED PROBLEMS
AMONG ONLINE GAMBLERS

FINDING SS-5.3
**PROPORTION OF ONLINE GAMBLERS
WHO REPORTED REGULAR TOBACCO
CONSUMPTION**

DEFINITION

The ratio of the number of adult online gamblers who reported smoking every day to the adult online gambling population in Québec.

OPERATIONALIZATION

The number of adult online gamblers who reported smoking every day during the preceding 12 months



The number of adult online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The number of online gamblers who reported regular tobacco consumption is a status-information indicator that makes it possible to evaluate the vulnerability of online gamblers in relation to other addictive behaviour.

UNIVERSE

Online gamblers in the adult population of Québec

**MAIN SOURCES OF
ADMINISTRATIVE DATA**

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

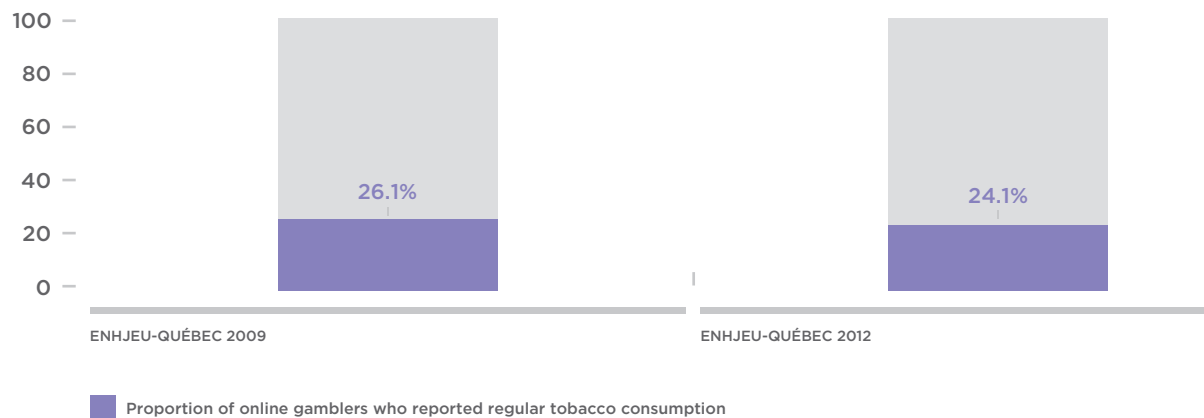
2009 - 2012 / USTQ1

Do you now smoke cigarettes...

...every day?	1
...occasionally?	2
...never?	3
Don't know	8
Refuse to answer	9

FINDINGS

5.3.1 Proportion of online gamblers who reported regular tobacco consumption



HIGHLIGHTS

- The proportion of online gamblers who reported regular tobacco consumption decreased slightly from 26.1% in 2009 to 24.1% in 2012.
 - Nevertheless, an examination of the confidence intervals does not allow us to conclude that there is a statistically significant difference between the 2009 rate and the 2012 rate.
-

FINDING SS-5 REDUCTION IN GAMBLING-RELATED PROBLEMS
AMONG ONLINE GAMBLERS

FINDING SS-5.4
PROPORTION OF GAMBLERS WHO REPORTED
ONLINE GAMBLING-RELATED PROBLEMS

DEFINITION

The ratio of the number of adult online gamblers who reported domestic, family, friendship, financial or legal problems caused by their online gambling habits to the adult online gambling population in Québec.

OPERATIONALIZATION

The number of adult online gamblers who reported domestic, family, friendship, financial or legal problems caused by their online gambling habits



The number of adult online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The number of online gamblers who reported online gambling-related problems is a status-information indicator that makes it possible to evaluate the ill effects of online gambling.

UNIVERSE

Online gamblers in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

REMARKS

- The proportion presents the gamblers who reported problems during their lifetimes. Because the sample was small, it is not possible to present the proportion for the preceding 12 months.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009 - 2012 / JHA_P1 - JHA_P4

Have your online gambling activities already caused you any kind of problem in your ability to accomplish certain domestic and familial tasks?

Have your online gambling activities already caused you any kind of problem in your relationships with your friends?

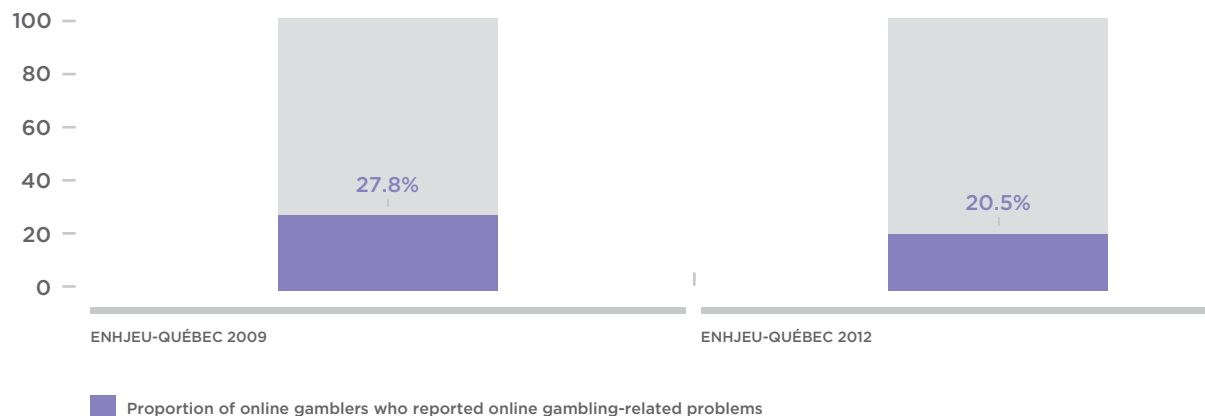
Have your online gambling activities already caused you any kind of problem in your finances?

Have you online gambling activities already caused you any kind of problem with the justice system?

No	1
YES, but not during the preceding 12 months	2
YES, during the preceding 12 months	3
Don't know	8
Refuse to answer	9

FINDINGS

5.4.1 Proportion of online gamblers who reported online gambling-related problems



HIGHLIGHTS

- The proportion of online gamblers who reported online gambling-related problems in the course of their lifetimes decreased from 27.8% in 2009 to 20.5% in 2012.
 - Nevertheless, an examination of the confidence intervals does not allow us to conclude that there is a statistically significant difference between the 2009 rate and the 2012 rate.
-

FINDING SS-5 REDUCTION IN GAMBLING-RELATED PROBLEMS
AMONG ONLINE GAMBLERS

FINDING SS-5.5
PROPORTION OF ONLINE GAMBLERS
WHO REPORTED PHYSICAL OR MENTAL
HEALTH PROBLEMS

DEFINITION

The ratio of the number of adult online gamblers who reported physical or mental health problems caused by their online gambling habits to the adult online gambling population in Québec.

OPERATIONALIZATION

The number of adult online gamblers who reported physical or mental health problems caused by their online gambling habits



The number of adult online gamblers during the preceding 12 months

UTILIZATION/INTERPRETATION

The number of online gamblers who reported physical or mental health problems is a status-information indicator that makes it possible to evaluate the ill effects of online gambling.

UNIVERSE

Online gamblers in the adult population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

REMARKS

- Because the sample was small, the proportion presented is an amalgam of online gamblers who reported problems during the preceding 12 months and those who reported problems in the course of their lifetimes.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2012

2012 / INT_Q10 - INT_Q11

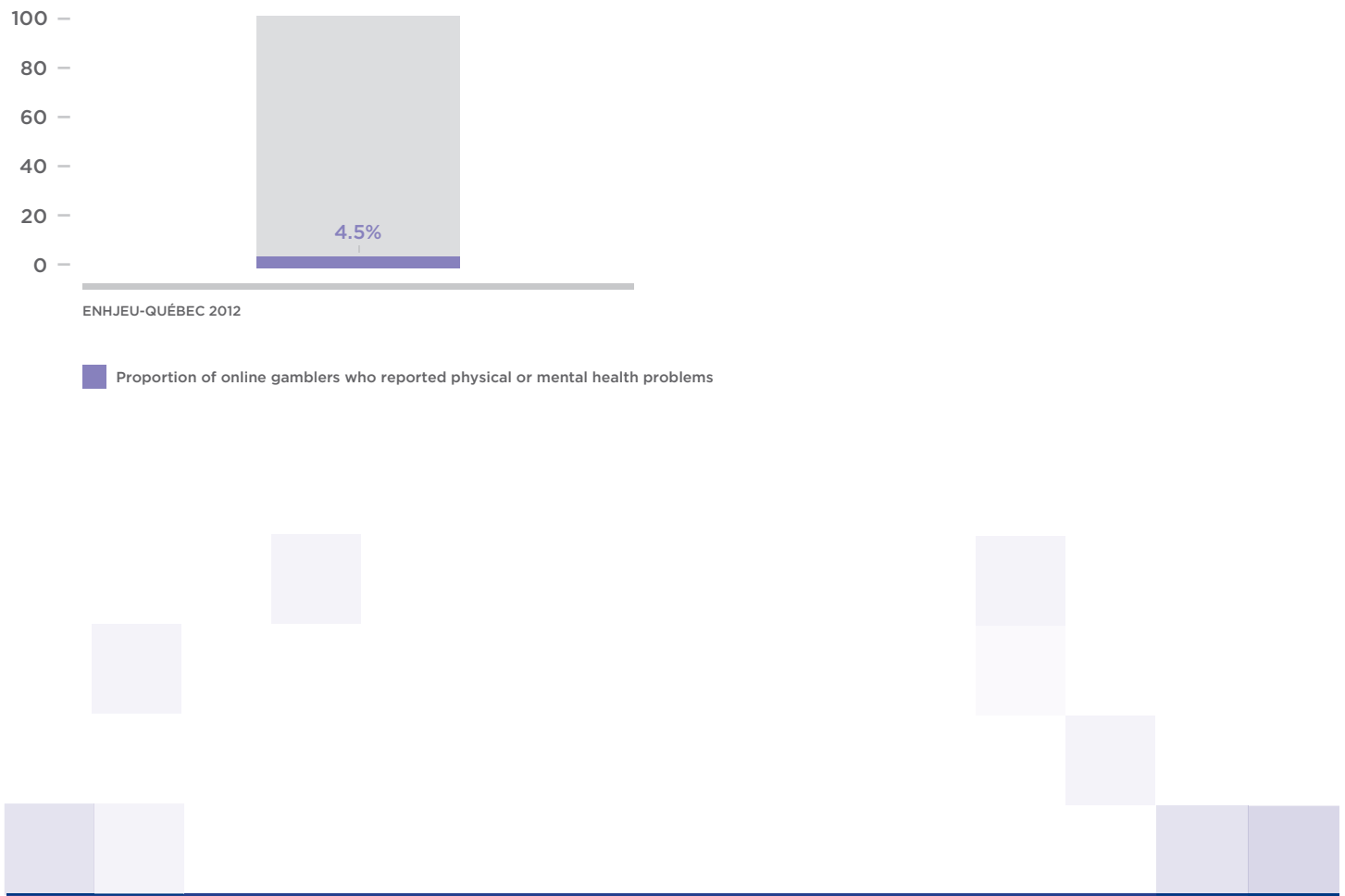
Have your online gambling activities already caused you problems with respect to your physical health?

Have your online gambling activities already caused you problems with respect to your mental health, including depressive or anxiety disorders?

No	1
YES, but not during the preceding 12 months	2
YES, during the preceding 12 months	3
Don't know	8
Refuse to answer	9

FINDINGS

5.5.1 Proportion of online gamblers who reported physical or mental health problems



HIGHLIGHTS

- The proportion of online gamblers who reported physical or mental health problems during the preceding 12 months or during their lifetimes stands at 4.5%.

SOCIOECONOMIC HYPOTHESIS

LOGICAL MODEL

RESOURCES (INPUTS)	STRATEGIC ORIENTATIONS	ACTIVITIES (OUTPUTS)	FINDINGS		
			Short term	Medium term	Long term
<p>SE-2 Ministère des Finances</p> <hr/> <p>SE-3 Loto-Québec</p>	<p>SE-3 Channel illegal gambling</p>	<p>SE-3 Launching by the government corporation of a legal online gambling website</p> <hr/> <p>SE-4 Implementation of online gambling promotional activities</p>	<p>SE-6 Reduction in problems related to the security of online gambling</p> <hr/> <p>SE-7 Reduction in problems related to the integrity of online gambling</p> <hr/> <p>SE-8 Increase in the availability of preventive tools adapted to online gambling</p> <hr/> <p>SE-9 Broader use of preventive tools adapted to online gambling</p>	<p>SE-10 Reduction in participation in deemed illegal online gambling offerings</p>	<p>SE-11 Increase in the market share of legal online gambling offerings</p>

SOCIOECONOMIC HYPOTHESIS

INDICATORS AVAILABLE

Finding SE-6 Reduction in problems related to the security of online gambling

Finding SE-6.1 Proportion of substantiated complaints concerning the security of personal data on Espacejeux

Finding SE-6.2 Proportion of substantiated complaints concerning allegations of criminal offences on Espacejeux

Finding SE-6.3 Number of reports submitted to the Financial Transactions and Reports Analysis Centre of Canada (FINTRAC)

Finding SE-7 Reduction in problems related to the integrity of online gambling

Finding SE-7.1 Proportion of substantiated complaints concerning the integrity of gambling on Espacejeux

Finding SE-8 Increase in the availability of responsible gambling tools adapted to online gambling

Finding SE-8.1 Gambling self-limitation systems available on an online gambling website

Finding SE-8.2 Gambling self-awareness tools available on online gambling websites

Finding SE-8.3 Gambling access self-limitation systems available on online gambling websites

Finding SE-8.4 Gambling problem detection tools available on online gambling websites

Finding SE-9 Increase in the use of preventive tools adapted to online gambling

Finding SE-9.1 Proportion of gamblers using a gambling time self-limitation system on an online gambling website

Finding SE-9.2 Proportion of gamblers using a gambling spending self-limitation system on an online gambling website

Finding SE-9.3 Proportion of gamblers using a gambling access self-limitation system on an online gambling website

Finding SE-10 Reduction in participation in online gambling on deemed illegal websites

Finding SE-10.1 Proportion of online gamblers who bet on deemed illegal online gambling websites

Finding SE-11 Increase in the market share of legal online gambling offerings

Finding SE-11.1 Espacejeux's revenues

Finding SE-11.2 Cumulative incidence of registrations on the legal online gambling website

Finding SE-11.3 Participation rate on the legal online gambling website

FINDING SE-6.1 PROPORTION OF SUBSTANTIATED COMPLAINTS CONCERNING THE SECURITY OF PERSONAL DATA ON ESPACEJEUX

DEFINITION

The number of substantiated complaints in relation to the number of complaints submitted to Loto-Québec according to which personal data entrusted to Espacejeux was apparently compromised.

OPERATIONALIZATION

The number of complaints that Loto-Québec deemed to be substantiated concerning the security of personal data on Espacejeux



The number of complaints submitted to Loto-Québec concerning the security of personal data on Espacejeux

INTERPRETATION

The number of complaints submitted to Loto-Québec concerning allegations of criminal offences according to which personal data entrusted to Espacejeux was apparently compromised is a status-information indicator. The annual change reveals the fluctuation in the number of substantiated complaints.

UNIVERSE

Individuals registered on the Espacejeux website

MAIN SOURCES OF ADMINISTRATIVE DATA

LOTO-QUÉBEC

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Gamblers registered on the Espacejeux website

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

December 2010 to November 2013

METHODOLOGICAL REFERENCES ON THE DATA

None

REMARKS

- Loto-Québec collected and analyzed the data.

FINDINGS



HIGHLIGHTS

- During Espacejeux's first three years of operation, no complaint was submitted to Loto-Québec according to which personal data entrusted to its online gambling website was apparently compromised.

FINDING SE-6 REDUCTION IN PROBLEMS RELATED TO THE SECURITY OF ONLINE GAMBLING

FINDING SE-6.2
REDUCTION IN PROBLEMS RELATED TO THE SECURITY OF ONLINE GAMBLING

DEFINITION

The number of substantiated complaints in relation to the number of complaints submitted to Loto-Québec concerning allegations of criminal offences on Espacejeux.

OPERATIONALIZATION

The number of complaints deemed substantiated concerning allegations of criminal offences on Espacejeux



The number of complaints submitted to Loto-Québec concerning allegations of criminal offences on Espacejeux

INTERPRETATION

The number of complaints submitted to Loto-Québec concerning allegations of criminal offences on Espacejeux is a status-information indicator. The annual change reveals the fluctuation in the number of substantiated complaints.

UNIVERSE

The population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

LOTO-QUÉBEC

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

December 2010 to November 2013

METHODOLOGICAL REFERENCES ON THE DATA

None

REMARKS

- Loto-Québec collected and analyzed the data.

FINDINGS



HIGHLIGHTS

- During its first three years of operation, Espacejeux counted the complaints submitted to Loto-Québec by individuals who alleged that they were the victims of criminal offences by third parties on Espacejeux.
- Among the complaints filed, Loto-Québec deemed one-quarter of them to be substantiated and, consequently, a number of customer accounts were closed.

FINDING SE-6.3

NUMBER OF REPORTS SUBMITTED TO THE FINANCIAL TRANSACTIONS AND REPORTS ANALYSIS CENTRE OF CANADA (FINTRAC)

DEFINITION

The number of reports submitted by Loto-Québec to FINTRAC in respect of financial transactions on Espacejeux deemed to be dubious or that exceed \$10 000.

INTERPRETATION

The number of reports submitted by Loto-Québec to FINTRAC in respect of financial transactions on Espacejeux deemed to be dubious or that exceed \$10 000 is a status-information indicator. The annual change reveals the fluctuation in the number of reports submitted.

UNIVERSE

The population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

LOTO-QUÉBEC

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

December 2010 to November 2013

METHODOLOGICAL REFERENCES ON THE DATA

None

REMARKS

- Loto-Québec collected and analyzed the data.

FINDINGS



HIGHLIGHTS

- During its first three years of operation, Loto-Québec submitted to FINTRAC reports on financial transactions on Espacejeux deemed to be dubious or that exceed \$10 000.

FINDING SE-7.1 PROPORTION OF SUBSTANTIATED COMPLAINTS CONCERNING THE INTEGRITY OF GAMBLING ON ESPACEJEUX

DEFINITION

The number of reports deemed to be substantiated in relation to the number of complaints submitted to Loto-Québec concerning the integrity of gambling on Espacejeux.

OPERATIONALIZATION

The number of complaints that Loto-Québec deemed to be substantiated concerning the integrity of gambling on Espacejeux



The number of complaints submitted to Loto-Québec concerning the integrity of gambling on Espacejeux

INTERPRETATION

The number of reports submitted to Loto-Québec concerning the integrity of gambling on Espacejeux is a status-information indicator. Changes in the number reveal the fluctuation in the number of substantiated complaints.

UNIVERS

The population of Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

LOTO-QUÉBEC

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

The population of Québec

PERIODICITY

Ongoing

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

December 2010 to November 2013

METHODOLOGICAL REFERENCES ON THE DATA

None

REMARKS

- Loto-Québec collected and analyzed the data.

FINDINGS



HIGHLIGHTS

- During Espacejeux's first three years of operation, Loto-Québec received complaints concerning the integrity of gambling on Espacejeux.
- Among the complaints received overall, Loto-Québec deemed one-quarter of them to warrant thorough investigation.
- Among the complaints received overall, Loto-Québec concluded that a very small minority of the complaints was substantiated.

FINDING SE-8 INCREASE IN THE AVAILABILITY OF RESPONSIBLE GAMBLING TOOLS ADAPTED TO ONLINE GAMBLING

**FINDING SE-8.1
GAMBLING SELF-LIMITATION SYSTEMS
AVAILABLE ON AN ONLINE GAMBLING SITE**

DEFINITION

The options that are available on online gambling websites to enable gamblers who possess an account to set a time limit on gambling per session and/or a monetary limit, either on the amount of the deposits paid into the account or the total amount bet during a gambling session.

OPERATIONALIZATION

The identification of the self-limitation tools available on Espacejeux.

UNIVERSE

The Espacejeux website

MAIN SOURCES OF DATA

ESPACEJEUX

www.espacejeux.com

For comparison purposes, we consulted Quebecers' top five poker websites and top five casino websites.

Poker websites:

- www.pokerstars.com
- www.fulltiltpoker.com
- www.888poker.com
- www.williamhill.com
- www.party poker.com

Casino websites:

- www.888.com
 - casino.bet365.com
 - www.casino.com
 - www.williamhill.com
 - www.freeslots.me
-

REMARKS

- The Alexa tool was used to identify the five most popular online paying poker and casino websites in Canada.
- The most popular online gambling websites vary over time. This indicator must be updated in light of changes in the online gambling website market accessible to Quebecers.

FINDINGS

ESPACEJEUX

8.1.1 Self-limitation systems available the www.espacejeux.com website

SITE	SELF-LIMITATION TOOLS			DESCRIPTION
	Deposit limits	Expense limits	Time limits	
Espacejeux	Weekly <hr/> Compulsory	Optional <hr/> Maximum amount for a determined period	Optional <hr/> Maximum time per day, per week or per month	<ul style="list-style-type: none"> • Expenses: Possibility on the registration form to limit a maximum amount of expenses, calculated by means of the gap between the opening balance of the account and the balance at the end of a given period.. • Time: Possibility on the registration form to set the maximum gambling time per day, per week or per month.

ONLINE POKER WEBSITES

8.1.2 Self-limitation systems available on popular online poker websites

SITE	OUTILS D'AUTOLIMITATION			DESCRIPTION
	Limites de dépôt	Limites de dépenses	Limites de temps	
PokerStars	Weekly <hr/> Optional	Limit for gambling tables Limit for tournament buy-ins	--	<ul style="list-style-type: none"> • Expenses: Possibility of limiting an amount of expenses at the gambling table or the amount of tournament buy-ins.
FullTilt Poker	Weekly <hr/> Optional	--	--	--
888 Poker	Daily, weekly or monthly <hr/> Optional	--	--	--
William Hill	Daily <hr/> Optional	--	--	--
Party Poker	Variable time <hr/> Optional	--	Optional by session	<ul style="list-style-type: none"> • Time: Possibility of setting a time limit per session (10 to 180 minutes per session).

ONLINE CASINO WEBSITES

8.1.3 Self-limitation systems available on popular online casino websites

SITE	SELF-LIMITATION TOOLS			DESCRIPTION
	Deposit limits	Expense limits	Time limits	
888	Daily, weekly or monthly _____ Optional	--	--	--
Bet 365	Daily, weekly _____ Optional	--	--	--
Casino.com	Daily, weekly or monthly _____ Optional	Limit on bets and limit on losses _____ Optional	--	<ul style="list-style-type: none"> • Expenses: Possibility of establishing limits on bets and losses per gambling session, on a daily or weekly basis.
William Hill	Daily _____ Optional	--	--	--
Freeslots	--	--	--	--

HIGHLIGHTS

- Espacejeux demands a deposit limit and offers the possibility of imposing both an expense and a time limit.
- Among the most popular poker and casino websites among Quebecers, all except one allow a deposit limit. Few websites allow gamblers to limit their spending or the time spent on the website.

FINDING SE-8.2

GAMBLING SELF-AWARENESS TOOLS AVAILABLE ON ONLINE GAMBLING SITES

DEFINITION

The options integrated into online gambling websites aimed at continuously or intermittently reminding gamblers of the time already devoted to gambling or the money spend during a session. Some examples are the permanent display of a clock, regular reminder messages (pop-ups) concerning the time and money spent, or a window that allows the gambler to view the amount of money spent.

OPERATIONALIZATION

The identification of the session reminder tools available on the Espacejeux website.

UNIVERSE

The Espacejeux website

MAIN SOURCES OF DATA

ESPACEJEUX

www.espacejeux.com

For comparison purposes, we consulted Quebecers' top five poker websites and top five casino websites.

Poker websites:

- www.pokerstars.com
- www.fulltiltpoker.com
- www.888poker.com
- www.williamhill.com
- www.party poker.com

Casino websites:

- www.888.com
- casino.bet365.com
- www.casino.com
- www.williamhill.com
- www.freeslots.me

REMARKS

- The Alexa tool was used to identify the five most popular online paying poker and casino websites in Canada.
- The most popular online gambling websites vary over time. This indicator must be updated in light of changes in the online gambling website market accessible to Quebecers.

FINDINGS

ESPACEJEUX

8.2.1 Gambling self-awareness tools available on the www.espacejeux.com website

SITE	SESSION REMINDER TOOLS			DESCRIPTION
	Clock	Regular reminders	Monitoring of gambling history	
Espacejeux	✓	✓	✓	<ul style="list-style-type: none">• Clock: Positioned visibly everywhere on the website.• Reminders: Once every hour a window opens on the screen to inform the gambler of the exact time spent gambling and the amounts won or spent.• Follow-up: The history of the hands and games in which the gambler has participated and of deposits and withdrawals are available.



ONLINE POKER WEBSITES

8.2.2 Gambling self-awareness tools available on popular online poker websites

SITE	SESSION REMINDER TOOLS			DESCRIPTION
	Clock	Regular reminders	Monitoring of gambling history	
PokerStars	✓	--	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window. Not visible in the gambling table window. Consequently, the clock is visible if and only if the lobby window remains open during the gambling session. • Follow-up: The history of the hands, games and tournaments in which the gambler has participated and the history of financial transactions are available.
FullTilt Poker	✓	--	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window. Not visible in the gambling table window. Consequently, the clock is visible if and only if the lobby window remains open during the gambling session. • Follow-up: The history of the hands and tournaments in which the gambler has participated and the history of financial transactions are available.
888 Poker	✓	--	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window. Not visible in the gambling table window. Consequently, the clock is visible if and only if the lobby window remains open during the gambling session. • Follow-up: The history of the games in which the gambler has participated and the history of financial transactions are available.
William Hill	✓	✓	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window and in the gambling table window. • Reminders: In a window of the lobby, a section indicates the time that the gambler has been connected to the site and the hands in which he has participated (by session and all told). • Follow-up: The history of the games in which the gambler has participated and the history of financial transactions are available.
PartyPoker	✓	✓	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window. Not visible in the gambling table window. Consequently, the clock is visible if and only if the lobby window remains open during the gambling session. • Reminders: Only gamblers who have set themselves a time limit are informed once the limit has been reached. • Follow-up: The history of hands, games and tournaments in which the gambler has participated and the history of financial transactions are available.

ONLINE CASINO WEBSITES

8.2.3 Gambling self-awareness tools available on popular online casino websites

SITE	SESSION REMINDER TOOLS			DESCRIPTION
	Clock	Regular reminders	Monitoring of gambling history	
888	✓	--	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window and in the windows of different types of gambling (roulette and blackjack, slot machines, jackpot games, card and table games, video poker and arcade games). Live casino is the only gambling activity that does not display a visible clock during the gambling session. <hr/> <ul style="list-style-type: none"> • Follow-up: The history of the games and financial transactions is available.
Bet 365	✓	--	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window. Not visible in the windows of different gambling activities. Consequently, the clock is visible if and only if the lobby window remains open during the gambling session. <hr/> <ul style="list-style-type: none"> • Follow-up: The history of the games and financial transactions is available.
Casino.com	✓	--	✓	<ul style="list-style-type: none"> • Clock: Visible in the lobby window. Not visible in the windows of different gambling activities. Consequently, the clock is visible if and only if the lobby window remains open during the gambling session. <hr/> <ul style="list-style-type: none"> • Follow-up: The history of the games and financial transactions is available.
William Hill	--	--	✓	<ul style="list-style-type: none"> • Follow-up: The history of the games and financial transactions is available.
Freeslots	--	--	--	<ul style="list-style-type: none"> • No tool is available.

HIGHLIGHTS

- Espacejeux proposes three visible gambling self-awareness tools, i.e. a clock, regular reminders and monitoring of gambling history.
- Among the most popular poker and casino websites among Quebecers, a clock is usually available but rarely visible. Reminders are rare (two out of 10 sites) and all of the sites but one allow users to request a history of gambling and transactions.

FINDING SE-8.3 GAMBLING ACCESS SELF-LIMITATION SYSTEMS AVAILABLE ON ONLINE GAMBLING WEBSITES

DEFINITION

The options that are available on online gambling websites enable gamblers who possess an account to limit their access to the website for a determined period. This includes measures to allow gamblers to impose timeouts or to exclude themselves from the site for a set period of time.

OPERATIONALIZATION

The identification of the gambling access self-limitation tools (timeouts and self-exclusion) available on the Espacejeux website.

UNIVERSE

The Espacejeux website

MAIN SOURCES OF DATA

ESPACEJEUX

www.espacejeux.com

For comparison purposes, we consulted Quebecers' top five poker websites and top five casino websites.

Poker websites:

- www.pokerstars.com
- www.fulltiltpoker.com
- www.888poker.com
- www.williamhill.com
- www.partypoker.com

Casino websites:

- www.888.com
- casino.bet365.com
- www.casino.com
- www.williamhill.com
- www.freelots.me

REMARKS

- The Alexa tool was used to identify the five most popular online paying poker and casino websites in Canada.
- The most popular online gambling websites vary over time. This indicator must be updated in light of changes in the online gambling website market accessible to Quebecers.
- Gambling access self-limitation tools can take two forms, in particular timeouts and self-exclusion. Each website uses different criteria to define the length of timeouts or periods of self-exclusion available to gamblers. In the following table, any period of less than six months has been indicated in the first column (timeouts) while any period of six months or more has been indicated in the second column (self-exclusion). The only exception is the Espacejeux website, which offers single timeouts and periodic pauses of varying lengths and periods ranging from one month to five years defined as "self-exclusion."

FINDINGS

ESPACEJEUX

8.3.1 Gambling access self-limitation systems available on the www.espacejeux.com website

SITE	GAMBLING ACCESS SELF-LIMITATION TOOLS		DESCRIPTION
	Timeouts	Self-exclusion	
Espacejeux	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking single pauses (which begin and end on the date and at the time requested) or periodic pauses (for example, at the same time each week). • Self-exclusion: Gamblers have the possibility of excluding themselves for a period ranging from one month to five years.

ONLINE POKER WEBSITES

8.3.2 Gambling access self-limitation systems on the most popular online poker websites

SITE	GAMBLING ACCESS SELF-LIMITATION TOOLS		DESCRIPTION
	Timeouts	Self-exclusion	
PokerStars	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking pauses of 12 hours, 24 hours, 7 days, 30 days, 60 days or 120 days. • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of 6 months, more than 6 months or permanently.
FullTilt Poker	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking pauses of 12 hours, 24 hours, 3 days, 7 days, 30 days, 60 days or 90 days. • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of 180 days, 365 days, 545 days or permanently.
888 Poker	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking pauses of 1 day, 7 days, 2 weeks, 1 month, 2 months or 3 months. • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of 6 months.
William Hill	--	✓	<ul style="list-style-type: none"> • Self-exclusion: Gamblers have the possibility of excluding themselves for a period ranging from 6 months to 5 years.
Party Poker	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking pauses ranging from 1 to 180 days. • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of ranging from 6 months or more.

ONLINE CASINO WEBSITES

8.3.3 Gambling access self-limitation systems on the most popular online casino websites

SITE	GAMBLING ACCESS SELF-LIMITATION TOOLS		DESCRIPTION
	Timeouts	Self-exclusion	
888	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking pauses of 1 day, 7 days, 2 weeks, 1 month, 2 months or 3 months. • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of 6 months.
Bet 365	--	✓	<ul style="list-style-type: none"> • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of 6 months, 1 year, 2 years or 5 years.
Casino.com	✓	✓	<ul style="list-style-type: none"> • Timeouts: Gamblers have the possibility of taking pauses of up to 6 months. • Self-exclusion: Gamblers have the possibility of excluding themselves for a period of 6 months or more.
William Hill	--	✓	<ul style="list-style-type: none"> • Self-exclusion: Gamblers have the possibility of excluding themselves for a period ranging from 6 months to 5 years.
Freeslots	--	--	<ul style="list-style-type: none"> • No pause is available.

HIGHLIGHTS

- Espacejeux enables gamblers to take single pauses and periodic pauses (for example, at the same time every week). Users can also exclude themselves from the website for 5 years or less.
- Among the most popular poker and casino websites among Quebecers, a majority (6 websites out of 10) enable users to program single timeouts and all of the websites except one allow users to exclude themselves.

FINDING SE-8.4

GAMBLING PROBLEM DETECTION TOOLS AVAILABLE ON ONLINE GAMBLING WEBSITES

DEFINITION

Self-administered tests available on online gambling websites to enable gamblers to assess the level of risk linked to their gambling habits.

OPERATIONALIZATION

The identification of the gambling detection tools to assess the level of risk of gambling habits available on the Espacejeux website.

UNIVERSE

The Espacejeux website

MAIN SOURCES OF DATA

ESPACEJEUX

www.espacejeux.com

For comparison purposes, we consulted Quebecers' top five poker websites and top five casino websites.

Poker websites:

- www.pokerstars.com
- www.fulltiltpoker.com
- www.888poker.com
- www.williamhill.com
- www.partypoker.com

Casino websites:

- www.888.com
 - casino.bet365.com
 - www.casino.com
 - www.williamhill.com
 - www.freeslots.me
-

REMARKS

- The Alexa tool was used to identify the five most popular online paying poker and casino websites in Canada.
- The most popular online gambling websites vary over time. This indicator must be updated in light of changes in the online gambling website market accessible to Quebecers.

FINDINGS

ESPACEJEUX

8.4.1 Problem gambling detection tools available on the www.espacejeux.com website

SITE	TESTS AVAILABLE	DESCRIPTION OF THE ACCESS PROCEDURE
Espacejeux	Your player profile in eight questions (non-validated test)	<p>From December 2010 to November 2012</p> <p>In the “Responsible Gambling” section, users could click on a subsection entitled “8/8 (your player profile). Take a test comprising eight questions and discover your gambling behaviour.” The users were then redirected to the “Mise sur toi” website (www.misesurtoi.com) on which they accessed a test based on eight questions that enabled the respondent to obtain a profile of his gambling habits. The eight questions sought to determine whether the gambling habits were without risk, if they could cause adverse consequences or if they were problematical.</p>
	Your player profile in eight (four) questions (non-validated test)	<p>From November 2012 to August 2013</p> <p>In the “Responsible Gambling” section, users could click on a subsection entitled “8/8 (your player profile). Take a test comprising eight questions and discover your gambling behaviour.” The users were then redirected to the Loto-Québec website (www.lejeudroitresterunjeu.com), where they had to take the initiative to click on a section entitled “Respect your limits.” The users then had access to a test based on four questions (not eight) that proposed to the respondents a profile of their gambling habits and determine whether or not the habits were problematical. Recommendations were made on the basis of the responses to the four questions.</p>
	Your player profile in four questions (non-validated test)	<p>From September 2013 to the time of publication of this report</p> <p>In the “Responsible Gambling” section, users can click on a subsection entitled “Your player profile” and are then directed to a page entitled “Evaluate your gaming behaviour and habits by answering four simple questions.” By clicking on the link, the users are redirected to the Loto-Québec website (www.lejeudroitresterunjeu.com) on which they access a test comprising four questions that proposes to the respondents a profile of their gambling habits and determines if the habits do not cause problems, if they can lead to adverse consequences or if they are problematical. Recommendations are made on the basis of the responses to the questions.</p>

ONLINE POKER WEBSITES

8.4.2 Problem gambling detection tools available on popular online poker websites

SITE	TESTS AVAILABLE	DESCRIPTION OF THE ACCESS PROCEDURE
PokerStars	No test	--
FullTilt Poker	No test	--
888 Poker	Gamblers Anonymous test comprising 20 questions (non-validated test)	In the "888+ Responsible" section, users can click on a subsection entitled "Play Responsibly" then on a tab entitled "Player Protection." This page has a link entitled "Self-Assessment Test." By clicking on the link, the user is directed to a self-evaluation test comprising 20 questions, produced by Gamblers Anonymous, which enables the respondents to determine whether their habits are potentially pathological. It should be noted that the links and information are available only in English.
William Hill	No test	--
Party Poker	BBGS e-screener (non-validated test)	In the "Responsible Gambling" section, users can click on a subsection entitled "BBGS Test." On this page, users can answer the Brief Biosocial Gambling Screen (BBGS). The test has three questions, based on criteria respecting pathological gambling in the <i>Diagnostic and Statistical Manual of Mental Disorders</i> (DSM-IV). It enables respondents to determine whether they are exposed to greater risk of developing or confronting gambling addiction problems.

ONLINE CASINO WEBSITES

8.4.3 Problem gambling detection tools available on popular online casino websites

SITE	TESTS AVAILABLE	DESCRIPTION OF THE ACCESS PROCEDURE
888	Gamblers Anonymous test comprising 20 questions (non-validated test)	In the “888+ Responsible” section, users can click on a subsection entitled “Play Responsibly” then on a tab entitled “Player Protection.” This page has a link entitled “Self-Assessment Test.” By clicking on the link, the user is directed to a self-evaluation test comprising 20 questions, produced by Gamblers Anonymous, which enables the respondents to determine whether their habits are potentially pathological. It should be noted that the links and information are available only in English.
Bet 365	10 questions on gambling habits	In the “Responsible Gambling” section, users can click on the “Problem Gambling Questionnaire” and are invited to answer 10 questions. The source of the questions is not documented on the website. Similarly, no comment on the results is formulated. At the bottom of the page, it is stated that the higher the number of positive responses, the greater the risk of having a gambling problem. The website then proposes to respondents who think they have a gambling problem to visit www.gamecare.org.uk . It should be noted that this website is not available in French.
Casino.com	Five questions on gambling habits	In the “Responsible Gaming” section toward the middle of the page, a section entitled “How to control your gambling?” invites users to ask themselves five questions on their gambling habits. The source of the questions is not documented on the website. Similarly, no comment on the results is formulated. The website then indicates that people with a compulsive gambling problem are likely to answer ‘yes’ to some of the questions. If they need more help, they are urged to get in touch with one of the following organizations: Gamble Aware, Gamblers Anonymous, Gambling Therapy or Gamcare. The hyperlinks of the organizations are available. It should be noted that the links and information are available only in English.
William Hill	No test	--
Freeslots	No test	--

HIGHLIGHTS

- The Espacejeux website proposes a non-validated test on gambling habits whose content, visual presentation and accessibility varied from one observation period to the next.
- It is unusual for a problem gambling detection test to be available on Quebecers’ favourite poker and casino websites.

FINDING SE-9.1

PROPORTION OF GAMBLERS USING A GAMBLING TIME SELF-LIMITATION SYSTEM ON AN ONLINE GAMBLING WEBSITE

DEFINITION

The proportion of gamblers who use a self-limitation system proposed by a website to establish a gambling time limit per day, per week or per month.

OPERATIONALIZATION

The number of gamblers who have used a gambling time self-limitation system on the Espacejeux website in a given quarter



The number of gamblers on the Espacejeux website during a given quarter

INTERPRETATION

This indicator makes it possible to calculate the proportion of gamblers registered with a gambling time self-limitation system to establish a gambling time limit per day, per week or per month on a website.

UNIVERSE

Individuals registered on the Espacejeux website

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently on a three-month cycle

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

REMARKS

- In March 2012, Espacejeux modified the registration form that included options to use self-limitation tools.

FINDINGS



HIGHLIGHTS

- Since the Espacejeux website was launched, the proportion of gamblers who use the time self-limitation system on the website has been halved. The drop in the utilization rate of the system coincides, in particular, with the modification of the registration form.
- Women are proportionally more numerous than men to register with the time self-limitation system, although the difference abates over successive observation periods.
- Older gamblers are proportionally more numerous than younger ones to register with the time self-limitation system.

FINDING SE-9.2

PROPORTION OF GAMBLERS USING A GAMBLING SPENDING SELF-LIMITATION SYSTEM ON AN ONLINE GAMBLING WEBSITE

DEFINITION

The proportion of gamblers who use a self-limitation system proposed by a website to establish a gambling spending limit per day, per week or per month.

OPERATIONALIZATION

The number of gamblers who have used the gambling spending self-limitation system on the Espacejeux website in a given quarter



The number of gamblers on the Espacejeux website during a given quarter

INTERPRETATION

This indicator makes it possible to calculate the proportion of gamblers registered with a gambling spending self-limitation system to establish their maximum gambling spending per day, per week or per month on a website.

UNIVERSE

Individuals registered on the Espacejeux website

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently on a three-month cycle

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

REMARKS

- In March 2012, Espacejeux modified the registration form that included options to use self-limitation tools.

FINDINGS



HIGHLIGHTS

- Since the Espacejeux website was launched, the proportion of gamblers who use the spending self-limitation system on the website has practically been halved. The drop in the utilization rate of the system coincides, in particular, with the modification of the registration form.
- Women are proportionally more numerous than men to register with the spending self-limitation system, although the difference abates over successive observation periods.
- The proportion of gamblers who use the gambling spending self-limitation system increases according to the age group. Older gamblers are proportionally more numerous than younger ones to register with the time self-limitation system.

FINDING SE-9.3 PROPORTION OF GAMBLERS USING A GAMBLING ACCESS SELF-LIMITATION SYSTEM ON AN ONLINE GAMBLING WEBSITE

DEFINITION

The proportion of gamblers who use a self-limitation system proposed by a website to limit their access to the website by blocking such access once or repeatedly for a determined or indeterminate period.

OPERATIONALIZATION

The number of gamblers who have used the gambling access self-limitation system on the Espacejeux website in a given quarter



The number of gamblers on the Espacejeux website during a given quarter

INTERPRETATION

This indicator makes it possible to calculate the proportion of individuals registered with a gambling access self-limitation system to block their access to a website once or repeatedly for a determined or indeterminate period.

UNIVERSE

Individuals registered on the Espacejeux website

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently on a three-month cycle

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

FINDINGS



HIGHLIGHTS

- Generally speaking, very few individuals registered on the Espacejeux website have used one of the variants of the gambling access self-limitation system that the website has proposed depending on the period analyzed.
- The proportions are comparable according to gender.
- When the Espacejeux website was launched, the proportion of customers who used the gambling access self-limitation system was inversely proportional to age. However, over successive periods, the proportions in each age group have drawn closer together.

FINDING SE-10.1

PROPORTION OF ONLINE GAMBLERS WHO BET ON DEEMED ILLEGAL ONLINE GAMBLING WEBSITES

DEFINITION

The ratio of the number of adult online gamblers who have bet or spent money on an deemed illegal online gambling website to the adult population of Québec.

OPERATIONALIZATION

The number of individuals who have made at least one bet on an deemed illegal online gambling website during the preceding 12 months



The size of the adult population of Québec

INTERPRETATION

This indicator reveals the proportion of adult Quebecers who have placed at least one bet on an deemed illegal online gambling website.

UNIVERSE

The adult population of Québec

MAIN SOURCES OF POPULATION-BASED DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2009, 2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). Enquête ENHJEU-Québec. *Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

RELATED QUESTIONS

ENJHEU-QUÉBEC 2009 AND 2012

2009-2012 / NT_QT1

During the past 12 months, have you bet or spent money on online gambling?

Yes	1
No	2
Don't know	8
Refuse to answer	9

2012 / INT_QT3_1 - INT_QT3_3

During the past 12 months, have you bet or spent money on:

Loto-Québec's Espacejeux website?

a social network website such as Facebook?

other online gambling websites such as PokerStars or Spin Palace Casino?

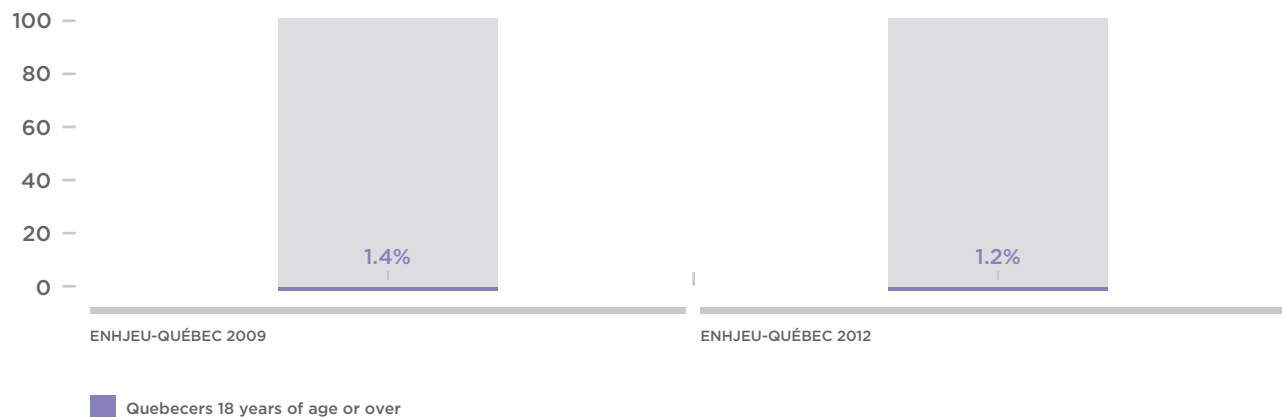
Yes	1
No	2
Don't know	8
Refuse to answer	9

REMARKS

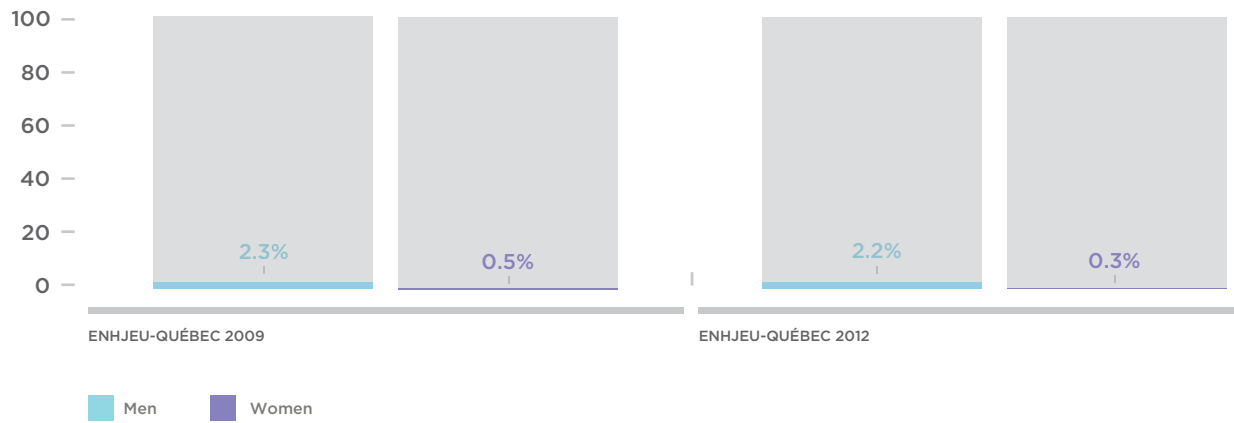
- No question in the 2009 ENHJEU-QUÉBEC survey focused specifically on deemed illegal online gambling offerings since prior to the launching of the Espacejeux website in 2010 all online gambling websites were deemed to be illegal.

FINDINGS

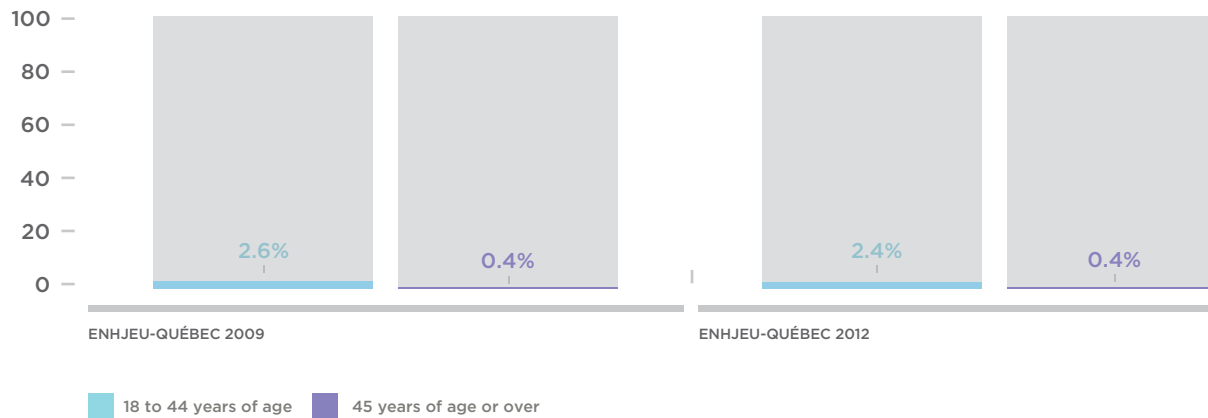
10.1.1 Proportion of online gamblers who bet on deemed illegal online gambling offerings

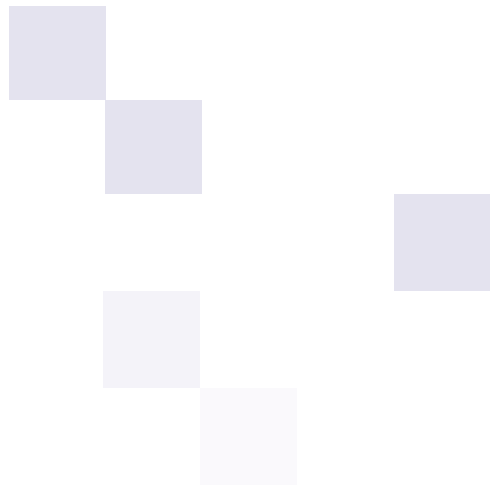


10.1.2 Proportion of online gamblers who bet on deemed illegal online gambling offerings, by gender



10.1.3 Proportion of online gamblers who bet on deemed illegal online gambling offerings, by age





HIGHLIGHTS

- The prevalence of participation in deemed illegal online gambling offerings fell from 1.4% in 2009 to 1.2% in 2012.
- This reduction was observed both among men and women and in different age groups.
- Nevertheless, the coefficients of variation linked to the rates are so big that no statistically significant difference was observed between the 2009 rates and the 2012 rates.

FINDING SE-11 INCREASE IN THE MARKET SHARE OF LEGAL ONLINE GAMBLING OFFERINGS

FINDING SE-11.1 ESPACEJEUX'S REVENUES

DEFINITION

The revenues that Loto-Québec's Espacejeux website generates.

INTERPRETATION

Espacejeux's revenues are a status-information indicator that makes it possible to monitor annual changes in the market share of legal online gambling offerings.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

LOTO-QUÉBEC

AGENCY RESPONSIBLE

Loto-Québec

PERIODICITY

Annual

DATA AVAILABLE

2011-2012 to 2012-2013

METHODOLOGICAL REFERENCES ON THE DATA

None

REMARKS

- Espacejeux's profits would have been a better indicator of the increase in market share of legal online gambling offerings. However, Loto-Québec did not agree to disclose its profits to the Working Group because the government corporation does not wish to reveal its cost structure.

FINDINGS

11.1.1 Espacejeux's revenues

2011-2012	2012-2013
\$20 491 000	\$31 591 257



HIGHLIGHTS

- Between 2011-2012 and 2012-2013, Espacejeux's annual revenues increased from nearly \$20 491 000 to \$31 591 257.

FINDING SE-11.2 CUMULATIVE INCIDENCE OF REGISTRATIONS ON THE LEGAL ONLINE GAMBLING WEBSITE

DEFINITION

The ratio of the number of adult Quebecers newly registered on the Espacejeux website to the adult population of Québec.

OPERATIONALIZATION

Incidence:

The number of adult Quebecers who registered on the Espacejeux website between December 2010 and March 2013



The size of the adult population of Québec

Cumulative incidence:

The sum of the number of adult Quebecers who have registered on the Espacejeux website since it was launched



The size of the adult population of Québec

INTERPRETATION

This indicator reveals the proportion of adult Quebecers who register on the Espacejeux website each quarter and those who have registered since the website was launched.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 year of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently on a three-month cycle

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

REMARKS

- Espacejeux officially launched its operations on December 1, 2010.
 - On March 26, 2012, it launched an online sports betting offering.
 - On August 27, 2012, it allowed the purchase of online lottery offerings.
 - By definition, incidence only refers to the occurrence of a given event, i.e. new cases. Consequently, the closing of accounts is not considered in the calculation of incidence but is taken into account to calculate prevalence.
-

FINDINGS

HIGHLIGHTS

- All told, very few adult Quebecers are registered on the Espacejeux website.
 - During the first quarter of Espacejeux's operations, a very small minority of Quebecers registered and the proportion of them who registered in subsequent six-month periods fell further.
 - In each quarter, the incidence rate is higher among men than among women.
 - Quebecers 25 to 44 years of age have the highest incidence rates, followed by those 18 to 24 years old. Quebecers 65 years of age or over have the lowest incidence rates.
-

FINDING SE-11.3 PARTICIPATION RATE ON THE LEGAL ONLINE GAMBLING WEBSITE

DEFINITION

The ratio of the number of adult Quebecers who placed at least one bet on the Espacejeux website to the adult population of Québec.

OPERATIONALIZATION

Espacejeux:

The number of adult Quebecers who placed at least one bet on the Espacejeux website between December 2010 and March 2013



The size of the adult population of Québec

ENHJEU-QUÉBEC:

The number of adult Quebecers who bet money on online gambling during the preceding 12 months



The total sample (representative of the adult population of Québec)

University of Hamburg Online Poker Database (OPD-UHH):

The number of Quebecers who bet money on an online poker website between September 2009 and March 2010



The size of the population of Québec

INTERPRETATION

This indicator reveals the proportion of adult Quebecers who placed at least one bet on the Espacejeux website in each quarter.

UNIVERSE

Québec

MAIN SOURCES OF ADMINISTRATIVE DATA

ESPACEJEUX

AGENCY RESPONSIBLE

Loto-Québec

POPULATION TARGETED

Quebecers 18 years of age or over registered on the Espacejeux website

PERIODICITY

Initial data in December 2010 and subsequently on a three-month cycle

LEVEL OF REPRESENTATIVENESS

The adult population of Québec

DATA AVAILABLE

Quarterly data (December 2010 to March 2013)

METHODOLOGICAL REFERENCES ON THE DATA

Internal Loto-Québec document

MAIN SOURCES OF POPULATION-BASED DATA

ENHJEU-QUÉBEC

AGENCY RESPONSIBLE

Concordia University

POPULATION TARGETED

Quebecers 18 years of age or over

PERIODICITY

Initial survey in 2009, repeated in 2012

LEVEL OF REPRESENTATIVENESS

Provincial

DATA AVAILABLE

2012

METHODOLOGICAL REFERENCES ON THE DATA

S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

OPD-UHH

AGENCY RESPONSIBLE

University of Hamburg, Germany

POPULATION TARGETED

The worldwide population of gamblers on the PokerStars, Full Tilt Poker, Everest Poker, IPN (Boss Media) and Cake Poker networks.

PERIODICITY

Data collected initially between September 2009 and March 2010, then repeated between March and November 2013

LEVEL OF REPRESENTATIVENESS

Worldwide

METHODOLOGICAL REFERENCES ON THE DATA

I. Fiedler and A.-C. Wilcke (2011). *The Market for Online Poker* (May 31). Consulted at dx.doi.org/10.2139/ssrn.1747646.

RELATED QUESTIONS

2009-2012 / INT_QT1

During the past 12 months, have you bet or spent money on online gambling?

2009-2012 / POK_Q13t / INT_POQ_Q1

During the past 12 months, how many times have you bet or spent money on online cash game poker?

2012 / INT_POKT_Q1

During the past 12 months, have you bet or spent money on online tournament poker?

REMARKS

ESPACEJEUX

- Espacejeux officially launched its operations on December 1, 2010.
- On March 26, 2012, it launched an online sports betting offering.
- On August 27, 2012, it allowed the purchase of online lottery offerings.
- The “overall” findings include data on casino gambling, poker, sports betting and lotteries.

ENHJEU-QUÉBEC

- The data reflect the prevalence of participation in online gambling both on the legal website and on the deemed illegal websites.
- The 2009 data concerning the prevalence of participation in online poker include cash game poker. The 2012 data include both cash game poker and tournament poker.
- The ENHJEU-QUÉBEC data have been used for comparison purposes.

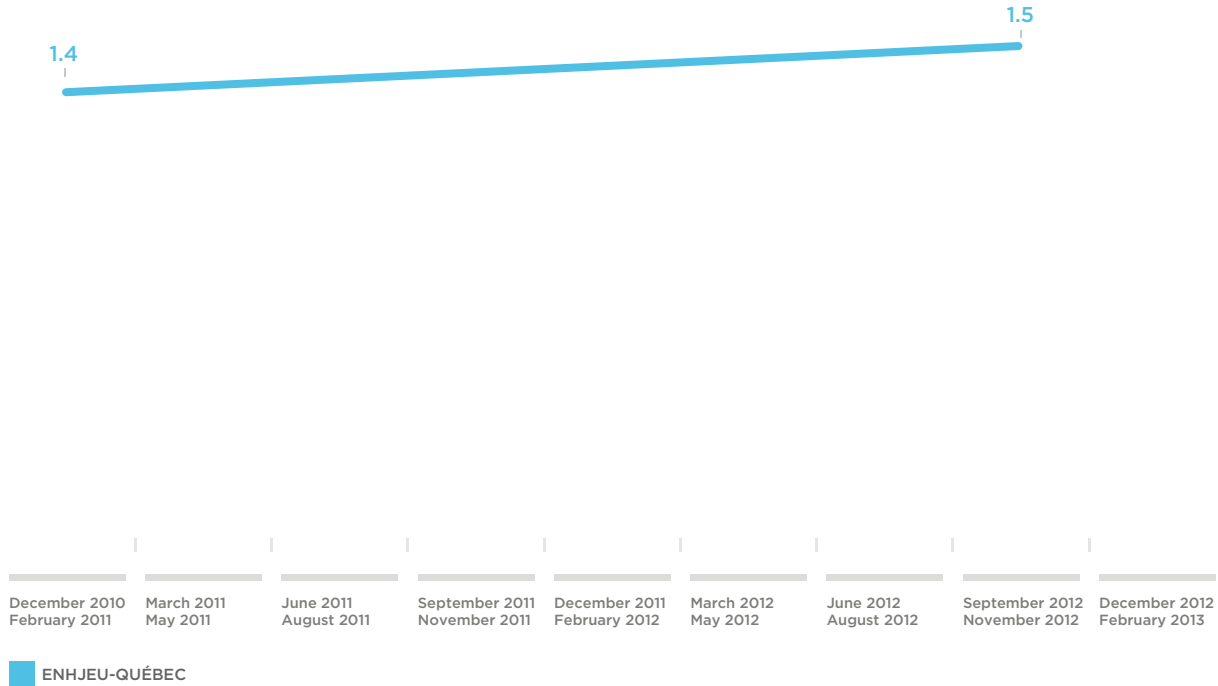
OPD-UHH

- The data are an extrapolation based on the prevalence of participation in online poker on one or more of the following deemed illegal websites: PokerStars, Full Tilt Poker, Everest Poker, IPN (Boss Media) and Cake Poker.
- The OPD-UHH data have been used for comparison purposes.

FINDINGS

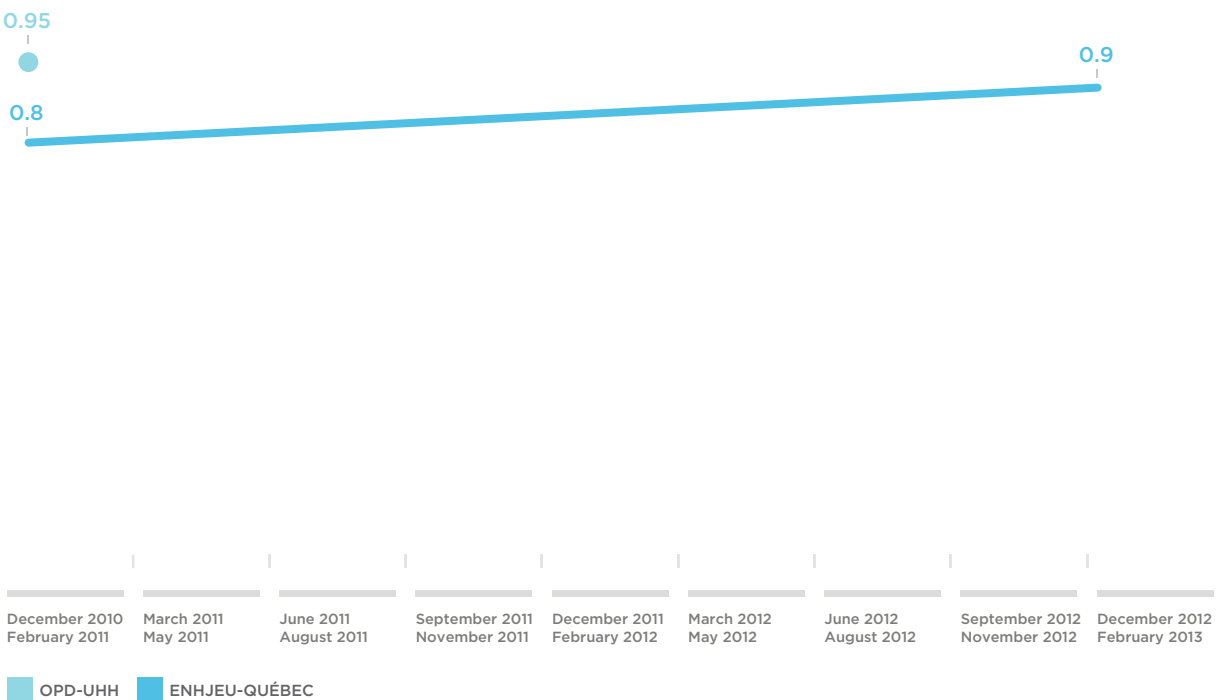
ENHJEU-QUÉBEC

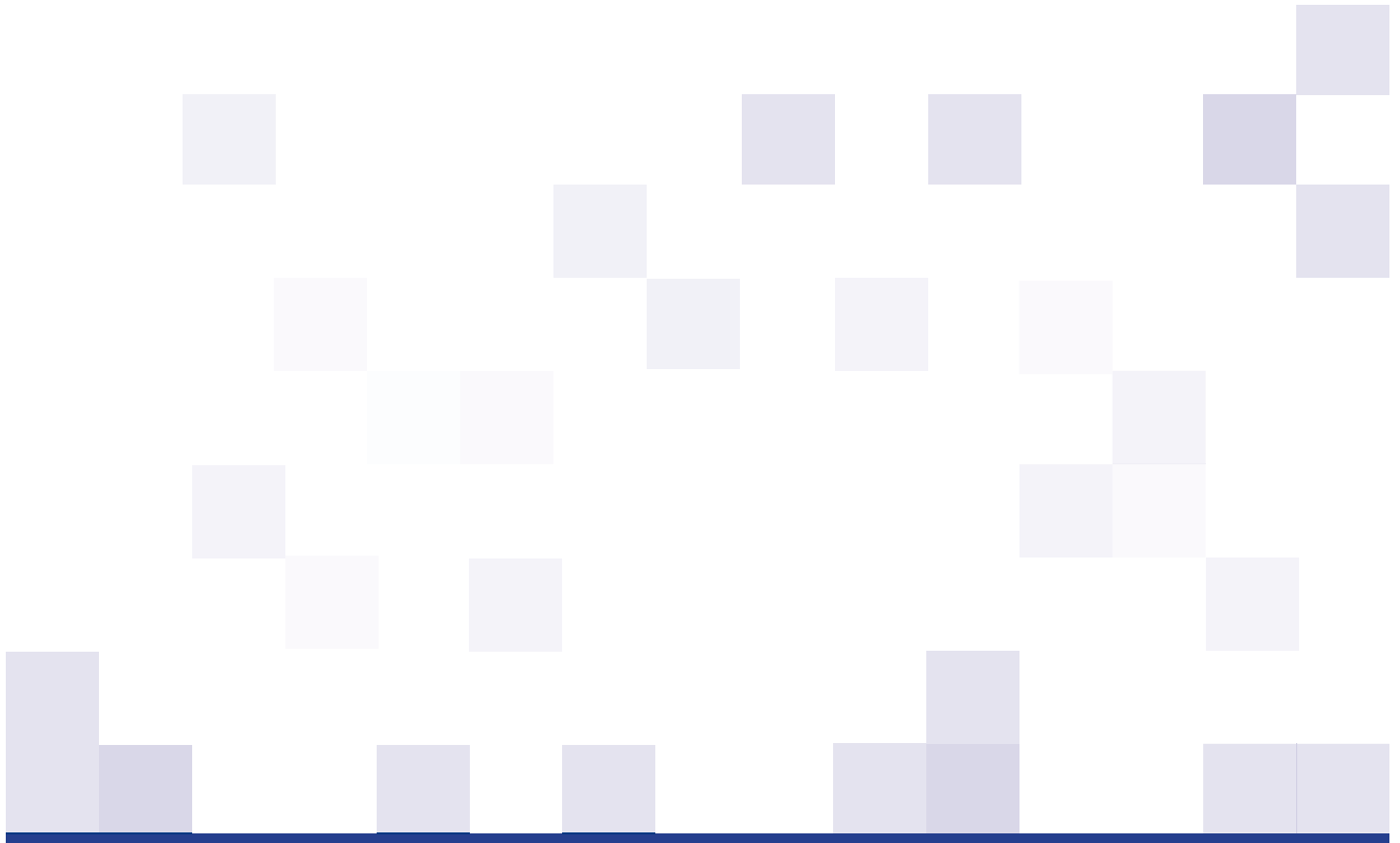
11.3.1 Participation rate (%) on the legal online gambling website (global), by quarter



ENHJEU-QUÉBEC AND OPD-UHH

11.3.4 Participation rate (%) on the legal online poker website, by quarter





HIGHLIGHTS

- Among adult Quebecers, the proportion of gamblers who placed at least one bet on the Espacejeux website is very small but it increased slightly between the first quarter and the last quarter of observation.
- In each quarter, the prevalence of participation on the legal online gambling website (global and poker) was higher among men than among women.
- In each quarter, the prevalence of participation on the legal online gambling website (global and poker) was the highest among Quebecers 25 to 44 years of age. It was the lowest among Quebecers 65 years of age or over.
- The prevalence of participation in online gambling among adult Quebecers increased from 1.4% in 2009 to 1.5% in 2012. In the case of online poker, prevalence rose from 0.8% in 2009 to 0.9% in 2012.
- In 2009, an estimated 0.95% of Quebecers participated in online poker on a deemed illegal poker website.

LEGAL HYPOTHESIS

LOGICAL MODEL

RESOURCES (INPUTS)	STRATEGIC ORIENTATIONS	ACTIVITIES (OUTPUTS)	FINDINGS		
			Short term	Medium term	Long term
J-4 Judicial system	J-4 Counter illegal gambling			J-12 Reduction in deemed illegal online gambling offerings	J-13 Broader regulation and control of online gambling offerings

LEGAL HYPOTHESIS

INDICATORS AVAILABLE

Finding J-12 Reduction in deemed illegal online gambling offerings

Finding J-12.1 Number of deemed illegal online gambling websites available in Québec

Finding J-12.2 Degree of visibility of online poker and casino gambling websites

Finding J-12.3 Average position on the Internet of online poker and casino gambling websites

FINDING J-12.1 NUMBER OF DEEMED ILLEGAL ONLINE GAMBLING WEBSITES AVAILABLE IN QUÉBEC

DEFINITION

The number of deemed illegal online gambling websites that it is possible to access in Québec for each type of gambling.

UTILIZATION/INTERPRETATION

The number of online gambling websites that it is possible to access is a status-information indicator that makes it possible to establish changes over time in deemed illegal online gambling websites that Quebecers can access.

UNIVERSE

The Web

MAIN SOURCES OF DATA

ONLINE.CASINOCITY.COM

AGENCY RESPONSIBLE

Casino City Press

PERIODICITY

Ongoing

DATA AVAILABLE

Since 2013

REFERENCES ON THE DATA

B. McNeal (2012). Website Review: Online Casino City. *UNLV Gambling Research & Review Journal*, 10(1), 11.

REMARKS

- When the Espacejeux website was launched, an estimated 2000 deemed illegal online gambling websites were accessible in Québec.

FINDINGS

12.1.1 Number of deemed illegal online gambling websites available in Québec

		Global ²	Casino	Poker	Lotteries	Sports betting
All websites	May 2013	2235	781	388	101	328
	August 2013	2171	790	288	102	351
	November 2013	2213	830	281	102	350
French-language websites	May 2013	586	247	129	39	51
	August 2013	514	246	53	37	52
	November 2013	530	263	51	38	52

² Aside from the casino, poker, lottery and sports betting websites, this heading includes slot machine, bingo, skill-testing, sports, financial speculation and live gambling websites.



HIGHLIGHTS

- The number of deemed illegal online gambling websites accessible in Québec has not changed since 2010. It stands at more than 2000 sites, of which at least 500 have a gambling platform in French.
- In 2013, the number of deemed illegal poker websites fell from 388 (of which 129 were French-language sites) in May to 281 (including 51 French-language sites) in November.

FINDING J-12.2 DEGREE OF VISIBILITY OF ONLINE POKER AND CASINO GAMBLING WEBSITES

DEFINITION

The number of keywords/expressions on which a specific online gambling website appears among the 50 first positions when a search using the most popular online poker or casino keywords/expressions is launched in a search engine.

OPERATIONALIZATION

ONLINE POKER

The number of poker keywords/expressions on which Espacejeux ranks among the 50 first positions of Google results, except for paid advertisements



The most popular poker keywords/expressions

ONLINE CASINO

The number of casino gambling keywords/expressions on which Espacejeux ranks among the 50 first positions of Google results, except for paid advertisements



The most popular casino gambling keywords/expressions

INTERPRETATION

The higher the proportion of keywords/expressions, the more visible a website is.

UNIVERSE

The Web

MAIN SOURCES OF DATA

GOOGLE

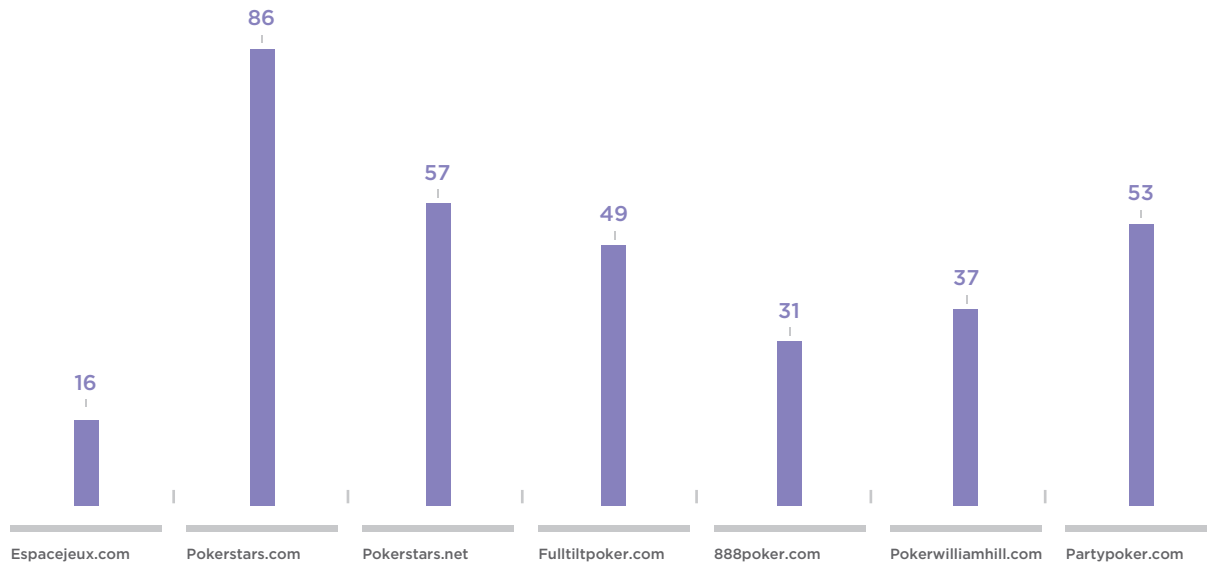
REMARKS

- The Google Keyword Tool was used to determine the most popular online casino gambling and poker keywords and expressions, i.e. the expressions and keywords that in April 2013 were subject to the greatest number of monthly searches in the “Canada – French”⁷⁷ geographic zone. Some 51 (poker) and 47 (casino gambling) keywords/expression were chosen.
- The Alexa tool was used to identify the five most popular online paying poker and casino websites, indeed the best positioned in Canada.
- The most popular online gambling websites vary over time. This indicator must be updated in light of changes in the online gambling website market accessible to Quebecers.

FINDINGS

ONLINE POKER

12.2.1 Visibility of the Espacejeux website and popular online poker websites on the most popular online poker keywords and expressions

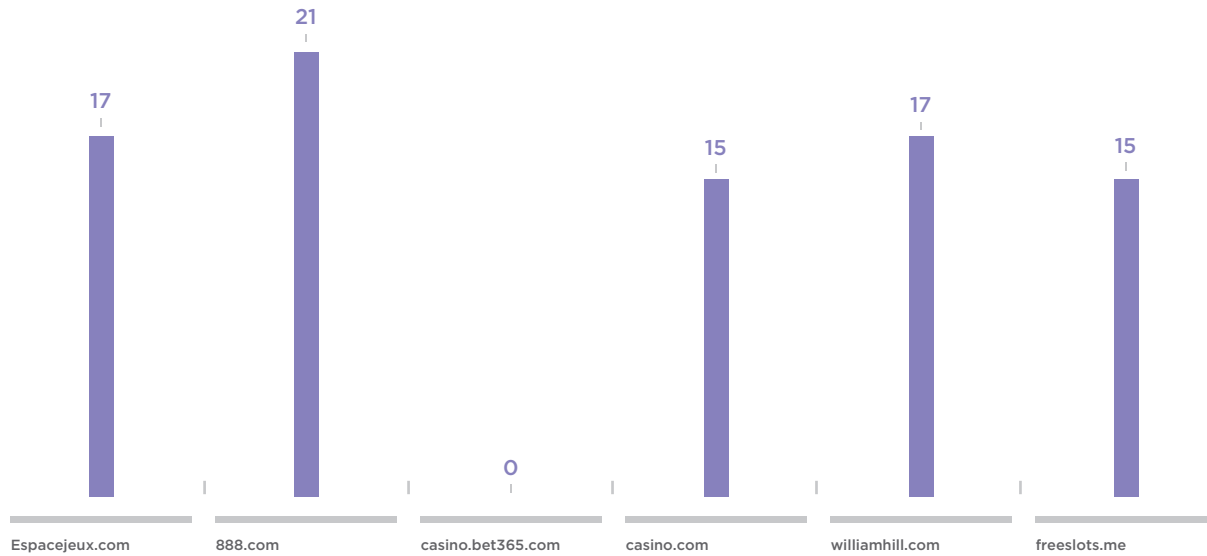


■ Percentage of poker keywords/expressions on which Espacejeux appears among the first 50 positions in Google results

⁷⁷ Since August 2013, the Google Keyword Tool makes possible searches by geographic zone by city and province. This option was not available when the Working Group conducted its analyses.

ONLINE CASINO

12.2.2 Visibility of the Espacejeux website and popular online casino websites on the most popular online casino keywords and expressions



Percentage of casino gambling keywords/expressions on which Espacejeux appears among the first 50 positions in Google results



HIGHLIGHTS

- The Espacejeux website appears on 16% of the expressions that Quebecers use mostly frequently on Google to find a website offering online poker. This proportion is lower than those of the poker websites that are most popular with Quebecers, in respect of which the minimum level is 31% (888poker.com) and the maximum level is 86% (pokerstars.com).
- The Espacejeux website appears on 17% of the expressions that Quebecers use most frequently on Google to find a website offering online casino gambling. This proportion is similar to those of the casino websites that are most popular with Quebecers, in respect of which the minimum level is 0% (casino.bet365.com) and the maximum level is 21% (888.com).

RÉSULTAT J-12.3

AVERAGE POSITION OF ONLINE POKER AND CASINO GAMBLING WEBSITES

DEFINITION

The average position of an online gambling website when a search is launched on the Internet using the most popular online poker or casino gambling keywords/expressions on a search engine.

OPERATIONALIZATION

ONLINE POKER

The average of Espacejeux's position on online poker game keywords/expressions overall where the website ranks among the 50 first positions of the Google results, except for paid advertisements.

ONLINE CASINO

The average of Espacejeux's position on online casino gambling keywords/expressions overall where the website ranks among the 50 first positions of the Google results, except for paid advertisements.

INTERPRETATION

The lower the position is, the higher the website is on the list and is thus well ranked.

UNIVERSE

The Web

MAIN SOURCES OF DATA

GOOGLE

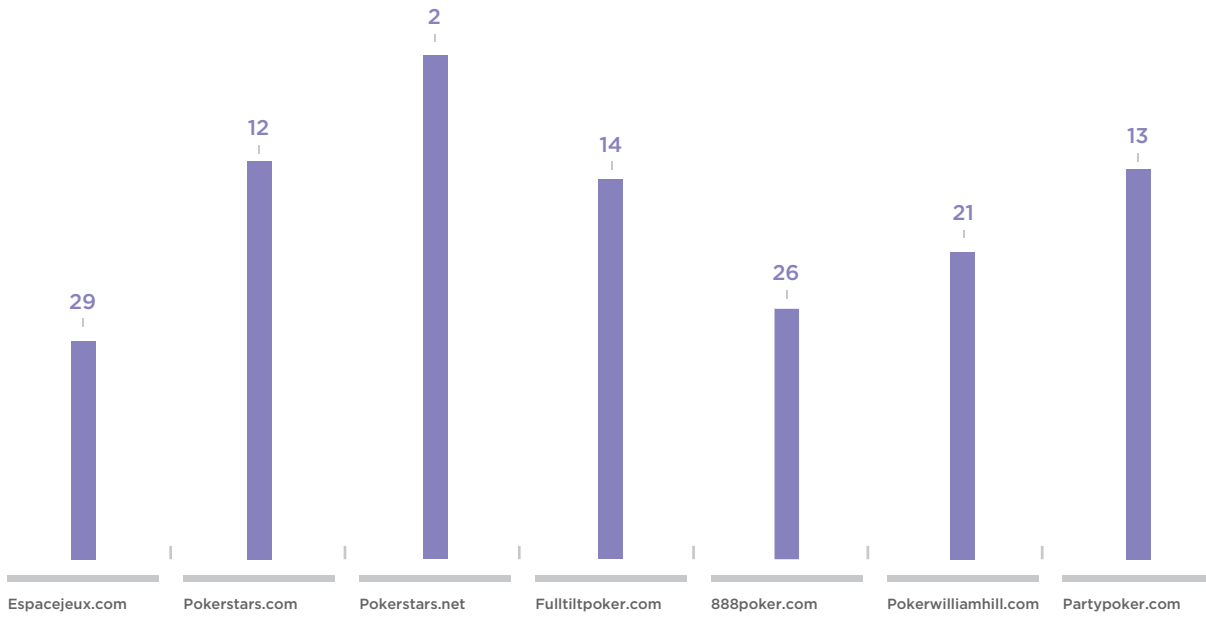
REMARKS

- The SEOMoz tool was used to calculate the average position of selected websites on different keywords/expressions entered into the Google search engine.
- The Alexa tool was used to identify the five most popular online paying poker and casino websites, indeed the best positioned in Canada.
- The most popular online gambling websites vary over time. This indicator must be updated in light of changes in the online gambling website market accessible to Quebecers.

FINDINGS

ONLINE POKER

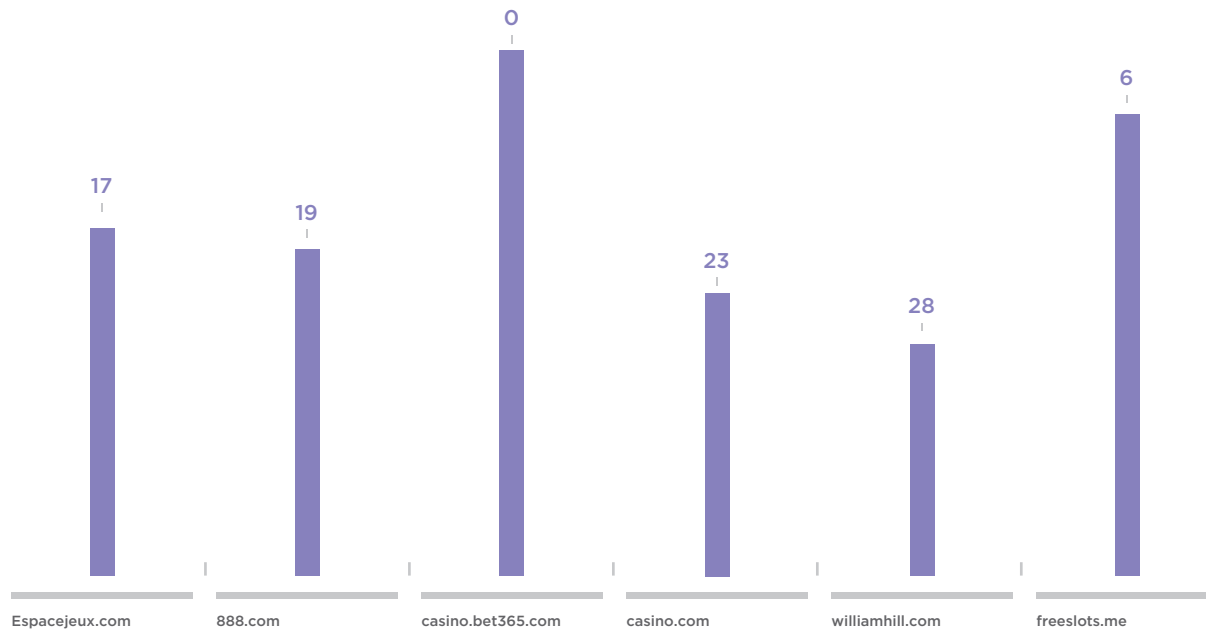
12.3.1 Average position of the Espacejeux website on the most popular online poker keywords and expressions



The average position of Espacejeux on online poker keywords/expressions overall where the website appears in the first 50 positions

ONLINE CASINO

12.3.2 Average position of Espacejeux on the most popular online casino keywords and expressions



The average position of Espacejeux on online casino gambling keywords/expressions overall where the website appears in the first 50 positions

HIGHLIGHTS

- On the expressions that Quebecers use most frequently to find a poker website, Espacejeux appears, on average, in the 29th position. This position is less favourable than those of Quebecers' favourite poker websites, whose ranking ranges from 2nd (pokerstars.com) to 26th (888poker.com).
- On the expressions that Quebecers use most frequently to find a casino gambling website, Espacejeux appears, on average, in the 17th position. This position is comparable to those of Quebecers' favourite casino websites, whose ranking ranges from 6th (freeslots.me) and above the 50th position (casino.bet365.com).



APPENDIX 2



Mémoire de la position des directeurs régionaux de santé publique sur l'étatisation des jeux d'argent par Internet au Québec

Le 3 février dernier, le ministre des Finances du Québec, M. Raymond Bachand, et le président et chef de la Direction de Loto-Québec, M. Alain Cousineau, annonçaient l'élargissement de la sphère des jeux d'argent étatisés au réseau Internet. Il s'agit d'une augmentation de l'offre de jeu disponible aux Québécois. Dans le cadre d'allocutions tenues dans plusieurs chambres de commerce du Québec, peu avant cette annonce, Loto-Québec exprimait par ailleurs son désir de rejoindre davantage la clientèle des jeunes adultes québécois pour maintenir et augmenter les profits tirés du jeu. Il nous apparaît d'intérêt public de revenir sur certaines informations, de soulever des questions et de formuler des recommandations liées à notre mandat légal de surveillance et de prévention en matière de santé publique (L.R.Q., chapitre S-2.2, *Loi sur la santé publique*). Rappelons que le directeur de santé publique est notamment responsable dans sa région :

1. D'informer la population de l'état de santé général des individus qui la composent, des problèmes de santé prioritaires, des groupes les plus vulnérables, des principaux facteurs de risque et des interventions qu'il juge les plus efficaces, d'en suivre l'évolution et, le cas échéant, de conduire des études ou recherches nécessaires à cette fin.
2. D'identifier les situations susceptibles de mettre en danger la santé de la population et de voir à la mise en place des mesures nécessaires à sa protection.
3. D'assurer une expertise en prévention et en promotion de la santé et de conseiller l'agence sur les services préventifs utiles à la réduction de la mortalité et de la morbidité évitable.
4. D'identifier les situations où une action intersectorielle s'impose pour prévenir les maladies, les traumatismes ou les problèmes sociaux ayant un impact sur la santé de la population et, lorsqu'il le juge approprié, de prendre les mesures qu'il juge nécessaires pour favoriser cette action.

Absence de débat public sur le projet de jeu en ligne

L'expérience montre que les projets susceptibles d'entraîner des impacts sociaux potentiellement délétères, notamment sur la santé, bénéficient d'être soumis à des processus décisionnels transparents. Dans le contexte de l'annonce, seuls les avantages potentiels sur les plans économique et de sécurité publique ont été énoncés par les promoteurs de l'étatisation des jeux d'argent en ligne. Cependant, l'absence d'un débat de fond sur l'initiative n'a pas permis de dégager pleinement les grands enjeux qui y sont liés et d'investiguer les risques associés, pas plus qu'elle n'a permis à l'ensemble des parties intéressées de se prononcer.

Pour promouvoir la santé des Québécois et diminuer la pression sur le système de soins de santé, le gouvernement du Québec soutient plusieurs programmes visant l'adoption de saines habitudes de vie dans la population. Les initiatives s'appuient sur des politiques publiques qui contribuent au développement d'environnements favorables à la santé. Le comportement individuel s'exerce au sein d'environnements physiques et psychosociaux qui influencent et déterminent l'état de santé. Dans cette perspective, la gestion des jeux d'argent au Québec et la prévention des problèmes associés doivent être complémentaires et soutenues par des politiques publiques.

Reconnaissance de l'impact des problèmes de jeu

La pratique excessive de certains jeux de hasard et d'argent engendre des conséquences néfastes sur la santé globale des individus, un impact immédiat ou différé sur leur entourage familial et professionnel. Les recherches attestent d'une forte prévalence de problèmes physiques liés au stress ou simplement à la négligence chez les joueurs pathologiques, qui vont des troubles de digestion, de sommeil ainsi que de l'hypertension aux ulcères et aux colites. On associe aussi la consommation problématique de psychotropes ainsi que les troubles de l'humeur et les troubles de l'anxiété au jeu excessif. Les joueurs qui ont de graves problèmes de jeu ont tendance à manifester de l'anxiété, des symptômes dépressifs et à avoir des idées suicidaires. Sur le plan professionnel, le jeu excessif peut entraîner une baisse de productivité, de l'absentéisme, et ce, jusqu'à la perte de l'emploi. Sur le plan financier, le joueur problématique peut être amené à contracter des dettes et même à faire faillite. Le besoin d'argent pour jouer peut également conduire au vol, à l'usage de faux et de chèques sans provisions. Sur le plan familial, les problèmes de jeu génèrent des tensions, des mensonges, de la violence, une négligence du rôle parental. Chez les jeunes joueurs problématiques, les échecs scolaires et l'isolement du réseau de pairs sont très fréquents et associés au vol, au mensonge ou à l'incapacité à rembourser ses dettes. Les coûts tangibles et intangibles pour les individus et la société demeurent encore à évaluer au Québec. Cependant, les pertes matérielles encourues par un joueur pathologique se répercutent et s'étendent à la communauté et à son réseau social.

Impacts anticipés de l'étatisation des jeux d'argent sur Internet

Les technologies Internet (TI) sont largement utilisées à des fins ludiques et de divertissement chez les jeunes. Comme en témoigne un rapport du CEFRIO¹ traitant des TI chez les 12-24 ans : « les filles jasant, les gars jouent ». On retrouve les technologies Internet maintenant dans la grande majorité des foyers québécois. L'intégration des TI est presque complète² chez les jeunes. Chez les jeunes fréquentant le secondaire, c'est environ 480 000 jeunes qui utilisent l'Internet sur une base régulière. Les jeunes adultes ont également grandement intégré ces technologies dans leurs échanges et activités de loisir. Il apparaît que les usages futurs des individus, face aux jeux d'argent, continueront d'évoluer étroitement avec les TI. C'est dans cette optique qu'une réflexion concertée est nécessaire pour évaluer et prévenir les impacts de la nouvelle offre de jeu de Loto-Québec.

Bien que, comme l'indique Loto-Québec, **la participation aux jeux d'argent Internet** soit en progression, la proportion de gens qui s'y adonnent demeure encore marginale au Québec. Environ 5 %³ des élèves québécois du secondaire et 2 %⁴ de la population adulte canadienne jouent en ligne. Les études concluent à une plus grande participation des jeunes hommes.

¹ Rapport-synthèse sur la génération C. La génération C - Les 12-24 ans : moteurs de transformation des organisations. (décembre 2009)

² Giroux, L., Pons, C.-M., Piette, J. (2007). *Les jeunes et Internet : 2006. Appropriation des nouvelles technologies*. Rapport final de l'enquête menée au Québec dans le cadre du projet de recherche international, ministère de la Culture et des Communications, Gouvernement du Québec, 88 p.

Réseaux Éducation Média (Enquête menée par ERIN research). (2005). *Jeunes canadiens dans un monde branché. Phase II : Sondage des élèves*.

Rapport-synthèse sur la génération C. La génération C - Les 12-24 ans : moteurs de transformation des organisations. (décembre 2009)

³ Martin, I. Gupta, R., Derevensky, J. (2009). Participation aux jeux de hasard et d'argent, dans Dubé & al. (2009). Enquête québécoise sur le tabac, l'alcool, la drogue et le jeu chez les élèves du secondaire, 2008, Institut de la statistique du Québec.

⁴ Wood, R. T., & Williams, R. J. (2008). Internet Gambling in Canada: Prevalence, Patterns, and Land-Based Comparisons. Alberta Gaming Research Institute.

Houle, V. (2008). Processus de vigie mis en place dans le cadre de l'ouverture du salon de jeux à l'Hippodrome de Québec. Québec, Qc : Agence de la santé et des services sociaux de la Capitale-Nationale, Direction de santé publique.

Comparativement, la Suède et le Royaume-Uni affichent des taux de participation de 4 à 5 fois supérieurs chez les adultes;⁵ il s'agit de juridictions où le jeu est étatisé.

Par ailleurs, **les problèmes de jeu associés** à cette pratique sont d'importance et ils dépassent ce qui a été observé avec les appareils de loterie vidéo. Par exemple, en Suède, où les jeux d'argent sur Internet (JAI) sont exploités par l'État, c'est un joueur sur cinq qui affiche un problème de jeu chez les 18-24 ans qui jouent en ligne. La prévalence des problèmes de jeu pour cette catégorie d'âge a doublé en dix ans. La Colombie-Britannique offre une figure particulièrement préoccupante où le jeu problématique est associé à 29 % des joueurs en ligne adultes⁶. Au Québec, la situation actuelle se résume ainsi : **peu de Québécois s'adonnent aux jeux d'argent Internet, les jeunes participent davantage, les problèmes associés sont fréquents chez ceux qui s'y adonnent.**

L'étatisation des jeux d'argent Internet au Québec risque d'accélérer et d'augmenter la participation populaire, notamment parce qu'elle constitue un cautionnement de cette activité. Elle offre également un gage de confiance supérieur et, contrairement aux sites illégaux, on peut offrir des produits avec lesquels le consommateur est familier. Sur la base des informations disponibles, la situation future se présentera vraisemblablement comme suit au Québec : **plus de Québécois s'adonneront aux jeux d'argent Internet, ils seront plus nombreux à présenter un problème de jeu, surtout les jeunes.**

Le fort taux de problèmes associés au jeu en ligne s'explique par la présence de plusieurs caractéristiques bien documentées qui augmentent le risque de perte de contrôle du joueur; la rapidité des tours de jeux, la fréquence des événements et la programmation de « quasi-gains ». L'accessibilité à cette forme de jeu est de 24 heures par jour, 7 jours par semaine et l'isolement est un autre facteur contribuant au jeu problématique. Par ailleurs, les moyens annoncés par Loto-Québec n'apparaissent pas garants de la protection des joueurs – notamment en ce qui concerne le programme d'auto exclusion : même auto-exclus, les joueurs restent toujours à un « clic » de nombreux sites offrant un produit comparable.

Mise en marché et santé publique

La société d'État consent d'ores et déjà plus de 25 millions de dollars par année en ristournes promotionnelles aux joueurs de casino, une somme similaire en promotion de ses produits de loterie, plus de 15 millions en commandites et une somme inconnue pour d'autres formes de mise en marché (émissions télévisées, promotion dans les sites de vente, médias sociaux). Confrontée à la compétition des autres sites de jeux d'argent Internet, tout porte à croire que la société d'État adoptera des stratégies commerciales pour l'obtention de parts de marché. En cette matière, rappelons qu'un partenaire de Loto-Québec dans le domaine des jeux d'argent Internet (PlayNow) a augmenté le plafond des dépenses hebdomadaires permises de 120 \$ à 9 999 \$ en évoquant précisément cette compétition. Ces techniques de commercialisation et d'éventuels programmes de fidélisation sont autant d'éléments potentiellement aptes à faire augmenter la consommation excessive.

⁵ Swedish National Institute of Public Health. (2009). SWELOGS - a population study on gambling and health 2008/09. A presentation of key findings from the first data collection.

Gambling Commission (UK). Survey data on gambling participation. January 2010.

⁶ Ipsos Reid Public Affairs. (2008, January). British Columbia problem gambling prevalence study. Vancouver, Canada. Gaming policy and enforcement branch, Ministry of Public safety and Solicitor general.

Le crime organisé et les jeux d'argent en ligne

L'accès à des sites illégaux de jeu en ligne, nourrissant une économie souterraine, est évoqué comme principale justification à l'étatisation. Peu d'efforts semblent toutefois avoir été consentis au Québec pour prévenir cet accès au jeu des citoyens par des solutions d'information, technologiques, légales ou financières, non plus qu'à en prévenir les répercussions. Par ailleurs, comme dans les problématiques des drogues ou de la prostitution, l'implication du crime organisé dans des pratiques à risque ne représente pas nécessairement un élément suffisant pour que l'État investisse ce domaine de l'économie. Il nous semble, à ce moment, plus important de préserver la santé de la population sans faire l'économie d'un débat public autour de la question du jeu par Internet.

Cohérence des politiques sur le jeu

Lorsque les appareils de loterie vidéo (ALV) ont été commercialisés sans étude d'impact préalable en 1994, ils sont rapidement devenus une abondante source de revenus, certes, mais aussi une source imprévue et importante de problèmes de santé publique. Devant les nombreux témoignages et l'abondante littérature scientifique faisant état des problèmes de santé et des problèmes sociaux que les ALV engendrent, le Québec s'est vu obligé d'ajuster ses politiques publiques pour en réduire l'accès. La mise en place d'une plate-forme Internet offrant les produits de Loto-Québec semble incohérente avec l'esprit de ces politiques publiques. Les 18 directeurs de santé publique recommandaient en 2007, dans le cadre d'un Avis de santé publique sur l'implantation des salons de jeu au Québec, le développement d'une politique sur les jeux de hasard et d'argent, soutenue par un moratoire sur le développement de l'offre de jeu. Ils recommandaient une évaluation d'impacts des nouveaux projets et une consultation publique. Aucune de ces recommandations n'a été retenue.

Pistes de solution

La gestion des problèmes susceptibles d'être générés par les jeux en ligne pourrait s'inspirer des expériences que nous avons eues dans le dossier des appareils de loterie vidéo. Il a été démontré qu'en plus des mesures de prévention auprès des joueurs, pour minimiser les problèmes de jeu, il faut agir sur l'environnement afin de diminuer la dangerosité des jeux et leur accessibilité.

En ce qui concerne la dangerosité, tous les jeux n'étant pas délétères au même degré, une commercialisation sélective des jeux les moins dangereux est possible. On peut aussi limiter le plafond des sommes investies par le joueur, réduire la fréquence des événements de jeu, diminuer les taux de retour, éviter les programmes de fidélisation. Il est aussi possible de restreindre les modalités de paiement disponibles, notamment le jeu à crédit. Par contre, toutes ces mesures doivent impérativement être évaluées avant d'être considérées comme des solutions dans le cas du jeu en ligne, car elles sont pour le moment soit non testées, soit peu probantes.

Sur le plan de l'accessibilité, on peut interdire la publicité et la promotion des produits, réduire les plages horaires d'accès au jeu et la durée des séances de jeu. La structure du site de jeu en ligne (présentation, ergonomie, navigation, hyperliens, etc.) est également à examiner dans une perspective de prévention.

On retrouve dans différentes juridictions d'autres pistes touchant les dimensions technologiques, financières et juridiques, à être envisagées dans une analyse interdisciplinaire :

Celles ayant trait aux individus

- Clarifier le statut légal du jeu au Québec. Si la participation aux JAI est illégale, la population doit donc en être informée. Un message non ambigu consisterait en soi une initiative de prévention.
- Réaliser des activités de prévention auprès des jeunes et de leurs parents en collaboration avec les milieux scolaires.
- Soutenir l'utilisation de logiciels de contrôle parental et de blocages des sites de jeu d'argent pour les jeunes.

Celles ayant trait aux paiements

- Interdire aux institutions financières et aux compagnies de crédit d'honorer les transactions (paiements et gains) provenant de citoyens québécois sur des sites de jeu en ligne, comme l'ont fait les États-Unis.

Celles ayant trait aux fournisseurs

- Établir des collaborations avec les moteurs de recherche canadiens pour filtrer les référencement relatifs aux sites de jeu en ligne.

Demandes des directeurs régionaux de santé publique

Étant donné la présence de risques connus et associés au produit que Loto-Québec veut mettre en marché et une augmentation prévue du nombre de joueurs en ligne, les directeurs de santé publique de toutes les régions du Québec recommandent :

- 1) Le décret d'un report d'au moins un an de la date prévue d'implantation des jeux d'argent Internet afin de permettre des travaux préalables dont les résultats seront rendus publics. Les éléments suivants seraient à intégrer à ces travaux :
 - a) La mise sur pied d'un comité d'experts indépendants pour étudier préalablement les impacts potentiels et connus d'une augmentation ou d'une diversification de toute offre de jeu (santé publique, sécurité publique, recherche, éducation, représentants de la société civile).
 - b) L'examen approfondi d'alternatives juridiques, technologiques et financières à l'étatisation pour protéger la population des risques pour la santé du jeu en ligne.
 - c) Le financement d'activités de prévention pan-québécoise indépendantes préalables à toute augmentation ou diversification de l'offre de jeu.
 - d) La tenue d'études scientifiques indépendantes démontrant l'efficacité des dispositifs envisagés pour empêcher la participation des mineurs au jeu étatisé et pour endiguer l'augmentation des problèmes de jeu.
 - e) L'accès aux données de la société d'État à des fins de prévention et de recherche.
- 2) La formation d'un Comité d'éthique sociale sur le jeu étatisé, relevant de l'Assemblée nationale et une Commission parlementaire.
- 3) Si, à la suite de ces travaux, le lancement est jugé sécuritaire, les activités pourraient être lancées pour une période transitoire d'une durée de deux ans pendant laquelle ses modalités de commercialisation et ses impacts seraient monitorés. Le projet serait ensuite réévalué sur la base des informations documentées de l'expérience.

- 4) La création d'une politique québécoise sur les jeux d'argent, tel qu'il a été proposé lors de l'implantation des salons de jeux en 2007. Celle-ci permettrait de développer une vision globale où chaque modification à l'offre de jeu serait analysée en fonction de son impact sur le développement de problèmes de jeu.



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Agence de la santé et des services sociaux du Bas-Saint-Laurent (01)

Lu et approuvé par Dr Donald Aubin

M. Donald Aubin

Directeur de santé publique par intérim
Agence de la santé et des services sociaux du Saguenay–Lac-Saint-Jean (02)



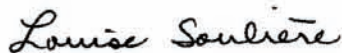
M. François Desbiens

Directeur de santé publique
Agence de la santé et des services sociaux de la Capitale-Nationale (03)



Monsieur Gilles W. Grenier

Directeur de santé publique
Agence de la santé et des services sociaux. de la Mauricie et du Centre-du-Québec (04)



Mme Louise Soulière

Directrice de santé publique et de l'évaluation
Agence de la santé et des services sociaux de l'Estrie (05)



M. Richard Lessard

Directeur de la prévention et de santé publique
Agence de la santé et des services sociaux de Montréal (06) et
Directeur de santé publique intérimaire
Conseil cri de la santé et des services sociaux de la Baie-James (18)



Mme Hélène Dupont
Directrice de santé publique par intérim
Agence de la santé et des services sociaux de l'Outaouais (07)



M. Réal Lacombe
Directeur de santé publique
Agence de la santé et des services sociaux de l'Abitibi-Témiscamingue (08)




M. Raynald Cloutier
Directeur de santé publique
Agence de la santé et des services sociaux de la Côte-Nord (09)



Mme Blandine Piquet-Gauthier
Directrice de santé publique
Agence de la santé et des services sociaux des Laurentides (15) et
Directrice de santé publique
Centre régional de santé et de services sociaux de la Baie-James (10)



M. Christian Bernier
Directeur de santé publique
Agence de la santé et des services sociaux de la Gaspésie–Îles-de-la-Madeleine (11)



M. Philippe Lessard
Directeur de santé publique et de l'évaluation
Agence de la santé et des services sociaux de Chaudière-Appalaches (12)



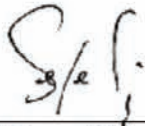
Mme Nicole Damestoy
Directrice de santé publique
Agence de la santé et des services sociaux de Laval (13)



M. Jean-Pierre Trépanier
Directeur de santé publique et d'évaluation
Agence de la santé et des services sociaux de Lanaudière (14)



Mme Jocelyne Sauvé
Directrice de santé publique
Agence de la santé et des services sociaux de la Montérégie (16)



M. Serge Déry
Directeur de santé publique
Régie régionale de la santé et des services sociaux du Nunavik (17)

2010-03-16

The background is a solid dark blue. On the left side, there are several overlapping, semi-transparent geometric shapes in various shades of blue, creating a layered effect. In the bottom right corner, there is a small cluster of squares in different shades of blue, some overlapping each other.

APPENDIX 3



APPENDIX 3

RESULTS OF FOLLOW-UP INTERVIEWS WITH ONLINE GAMBLERS

This appendix reports the outcomes of a study devoted to online gamblers. To fulfil its mandate, the Working Group deemed it worthwhile to meet online gamblers to better grasp their behaviour and attitudes in relation to an array of themes thought to be relevant. The 2012 population-based survey offered the possibility of constituting a representative sample of such gamblers.^{78 79}

1. METHODOLOGY

The sample of the 2012 ENHJEU-QUÉBEC survey comprised 12 008 participants representative of the general adult population of Québec. Among the participants, 159 said they had gambled online at least once in the preceding 12 months. At the conclusion of their interview for the survey, the interviewer invited each gambler to participate in a follow-up interview.

All told, 54% (86/159) of the participants agreed to be re-contacted, 65 responded⁸⁰ and 64 completed the interview in December 2012, for an overall response rate of 74%. The final sample comprised 55 men and nine women between 19 and 68 years of age, of whom the biggest proportion was in the 25 to 34 age group (n = 18). The majority of the individuals in the sample were single (n = 23), employed (n = 48), had completed CEGEP (n = 28) and had a household income of \$100 000 or more (n = 19).

Based on the responses to the questions in the Problem Gambling Severity Index during the 2012 ENHJEU-QUÉBEC survey, the breakdown of the sample according to the level of risk revealed that 37 participants had no problems, 17 were gamblers at low risk, 10 were gamblers at moderate risk, and one of the participants was a probable pathological gambler. Table 1 summarizes the data.

The first part of the interview contained questions on online gambling habits: the motivation for gambling, initiation, the most recent episode, the consequences and knowledge, use and appreciation of prevention tools and online gambling services. The second part focused on online gambling offerings and promotion and the regulations governing it. A series of questions dealt specifically with the Espacejeux website.

⁷⁸ The Working Group funded the study. The Fonds de recherche du Québec — Société et culture and the Working Group supported the population-based survey.

⁷⁹ S. Kairouz, L. Nadeau, and C. Robillard (2014). *Enquête ENHJEU-Québec. Portrait du jeu au Québec : Prévalence, incidence et trajectoires sur quatre ans*. Research report submitted to the Fonds de recherche du Québec — Société et culture, 49 pages.

⁸⁰ Contrary to what was asserted during the ENHJEU-QUÉBEC telephone survey, a participant in the follow-up interview stated that during his lifetime he had never bet or spent money on online gambling. The participant was thanked and was not asked to complete the interview.

Table 1: Description of the sample of online gamblers according to sociodemographic characteristics, 2012 (n = 64)

		N	%
Gender	Male	55	84.6%
	Female	9	15.4%
Age group	18 to 24	8	12.5%
	25 to 34	18	28.1%
	35 to 44	16	25.0%
	45 to 54	13	20.3%
	55 to 64	5	7.8%
	65 years and over	4	6.3%
Marital status	Single, never married	23	35.9%
	Married	15	23.4%
	Spousal partnership	17	26.6%
	Widow(er), separated, divorced	9	14.1%
Employment Status	Employed	48	75.0%
	Student	7	10.9%
	On leave (maternity, sick leave, on strike)	1	1.6%
	Retiree	7	10.9%
	Other	1	1.6%

		N	%
Level of education	High school not completed	2	3.2%
	High school completed, CEGEP not completed	14	21.9%
	CEGEP completed, university not completed	28	43.8%
	University completed	20	31.3%
Household income	\$39 999 or less	10	15.8%
	\$40 000 to \$69 999	16	25.0%
	\$70 000 to \$99 999	16	25.0%
	\$100 000 or more	19	29.7%
	No information	3	4.7%
Gambling profile	Problem-free gamblers	37	57.9%
	Gamblers at low risk	17	26.6%
	Gamblers at moderate risk	10	15.6%
	Probable pathological gamblers	0	0.0%

2. FINDINGS

2.1 GENERAL QUESTIONS

Among the 64 participants, 58 said they had bet or spent money on online gambling during the preceding 12 months. Among the six participants who said that they had not bet on online gambling during that time, the two main reasons given were the cost of the activity (n = 6) and anxiety about confidentiality, security or privacy (n = 4).

The majority of current online gamblers (n = 38/58) reported starting to gamble online before December 2010, i.e. before the Espacejeux website was launched. Fifteen participants said they began such activities between December 2010 and December 2011 and five of them, in 2012.

Substantially all of the participants indicated that, generally speaking, they considered themselves to be amateur/recreational gamblers (n = 57).

2.2 MODE OF PARTICIPATION IN GAMBLING DURING THE PRECEDING 12 MONTHS

The participants confirmed that, in general, when they engaged in online gambling, they most often played poker (n = 46), followed by table games such as blackjack and roulette (n = 13) and, less frequently, slot machines (n = 12), sports betting (n = 8), the lottery (n = 7), bingo (n = 4) and Keno (n = 3).

Among the 58 participants, 39 confirmed that they engaged in gambling solely or mainly online. To the question concerning the percentage of their time devoted to online gambling, 32 said they spent over 75% of their gambling time online.

As for the frequency of gambling, 25 said that they bet on online gambling less than once a month; 14, at least once a month; 15, at least once a week; and four, every day. The great majority (n = 43) typically gambled less than five hours per week. The evening, between 6 p.m. and midnight, was the time of day favoured by more than three-quarters of the participants (n = 45) to gamble online.

As for where the gamblers bet online, all of them indicated that they did so in their own homes. Some of the participants gambled while travelling (n = 4), from a neighbour's, a friend's or a family members' home (n = 5), or from a wireless access zone (n = 2). As for the type of electronic device that the participants used to bet online, more than half (n = 32) said they used a portable computer or a personal office computer (n = 30), nine a BlackBerry™, an iPhone™ or other wireless handheld device, and six participants mentioned a tablet computer.

From the standpoint of spending, 32 participants said that more than 75% of the money that they devoted to gambling was spent online. One participant in two (29/58) said that he had lost more money than he had won.

With regard to payment methods, more than three-quarters of the participants (n = 45) said they used a credit card to gamble online. According to 32 participants, the ability to pay with a credit card in no way influences the amounts bet, while 24 of them believed that the possibility of paying with a credit card would instead increase the amounts bet.

2.3 CONSUMPTION OF SUBSTANCES DURING BETTING ACTIVITIES OVER THE PREVIOUS 12 MONTHS

From the standpoint of the consumption of substances during gambling activities during the previous 12 months, 41 participants said that they had never smoked cigarettes while engaging in online gambling while nearly one-quarter (n = 13) said they almost always did so. More than half of the participants (33/58) said they never consumed alcohol while gambling online, while nearly two-thirds said they had done so occasionally, and eight said they consumed alcohol almost always or most of the time. The vast majority of the participants said they had never consumed cannabis (n = 47), while eight of them said they had occasionally consumed it, and three said that they had consumed it most of the time or almost always when they gambled online. Almost all of the participants said they had never consumed energy drinks while gambling online (n = 54), while four said they had occasionally consumed them.

2.4 ONLINE GAMBLING SITES VISITED DURING THE PREVIOUS 12 MONTHS

In this study, the participants had to spontaneously name one or more websites that they visited most often to bet online. Among the most frequently named sites were Espacejeux (n = 31), Poker Star (n = 29), followed by Full Tilt Poker. Moreover, 58 participants spontaneously named another 20-odd poker, casino and bingo websites.

Twenty-seven participants did not spontaneously name Espacejeux as one of the sites that they used most often to bet online. Among the latter, 21 also said that they had never bet on the site, mainly because they did not know it (n = 7) or because the software was not efficient (n = 5).

The factors mentioned by at least 75% of the participants in the survey as being very or fairly important in the choice of a website were: the security of financial data (n = 56), the website's reputation (n = 55), the reliability of the technology (n = 54), the protection of privacy (n = 53), the site's legality (n = 51), the site's convenience (n = 51), its ease of use (n = 48), and the site's rapidity of payment (n = 44).

2.5 ADVANTAGES AND DRAWBACKS OF ONLINE GAMBLING

To the question concerning the advantages of online gambling in relation to landbased gambling, whether deemed legal or illegal, at least 75% of the participants mentioned the following factors: convenience (n = 53), ease of use (n = 51) and the absence of related costs such as transportation and food (n = 44). Among all of the possible advantages, the greatest number of participants pinpointed accessibility as being the most important one (n = 27), followed by the absence of associated costs (n = 13).

When the participants were asked to indicate the drawbacks of online gambling in relation to landbased gambling, they most frequently mentioned: the dubious legality and uncertainty of the websites (n = 39), the risk of addiction and dependency (n = 38), the integrity of the games (n = 37), problematical, precarious Web technology (n = 32), and a problematical, slow, precarious Internet connection (n = 30). Among the drawbacks, the greatest number of participants deemed the most important drawback to be the environment and less pleasant social experience online (n = 11), followed by the risk of addiction and dependency (n = 9).

2.6 MOTIVATION

The vast majority of the participants confirmed that, very often or most of the time, when they gambled, it was simply because they enjoyed doing so or because they found it amusing (n = 49). More than three-quarters of the respondents said that they gambled very often or most of the time for pleasure and the feelings that it engenders (n = 45). Other motivation included a chance of winning the jackpot (n = 20) or the desire to take a chance (n = 13). Conversely, almost all of the participants indicated that needing money (n = 52), not being able to avoid doing so (n = 52), wanting to feel better (n = 50), wanting to win money as a profession (n = 50) or to socialize (n = 50) never motivated them to gamble online.

2.7 MOST RECENT GAMBLING EPISODE

The participants had to remember their most recent online gambling episode. For three of them, the episode occurred on the same day; for 11, during the week; for eight, between one week and one month earlier; for 13, between one and six months; and for seven, more than six months previously. Ten participants were unable to answer.

At the time of the most recent online gambling episode, to the question “What type of game did you play?”, more than half of the participants stated that they played poker (n = 38); nine, slot machines or VLT machines; five, table games other than poker, such as blackjack, roulette, and so on. For all of the participants but one (n = 57), the most recent episode of online gambling took place in their own homes. The majority of them used a portable personal computer (n = 30) and 23 others gambled on an office computer. More than half of the participants said that the most recent episode occurred between 6 p.m. and midnight (n = 31) and for more than one-quarter, between noon and 6 p.m. (n = 16). As for the duration of the online gambling episode, 23 participants said that they

bet during one hour or less; 29, between one and two hours; eight, between two and three hours; and the others (n = 8) for more than three hours.

Nearly half of the participants (n = 28) said that they lost more money than they won (50%) during the most recent online gambling episode; 20 said that they won more than they lost; and eight said they lost as much as they won. Among the participants who said that they won, 11/20 stated that they won less than \$100, and the others (9/20) confirmed that they won between \$100 and \$499. Among the 28 participants who said that they lost money, 25 reported losing less than \$100 and the other three said that they lost more than that.

2.8 INITIATION TO ONLINE GAMBLING

With regard to the age at which the participants said that they started gambling online, 19 stated that they did so after the age of 41; eight, between 31 and 40 years of age; 17, between 21 and 30 years of age; and 11, between 18 and 20 years of age. Three participants said that they started betting online for the first time before the age of 18, specifically at the age of 17.

During their initial online gambling experience, nearly two-thirds of the participants (38/58) said that they played with play money and 20 gambled with real money. As for the type of activities in which the participants took part when they bet online for the first time, the majority said that they played poker (n = 41); 12, table games other than poker, such as blackjack and roulette; five, slot machines, VLT machines or express games; and the remainder (n = 9), lottery, bingo, Keno or sports betting.

To the question “What factors do you deem to be very or fairly important in your decision to start gambling online?” at least 50% of the participants mentioned convenience (n = 51), ease of use (n = 47), the possibility of winning real money or a jackpot (n = 37), the possibility of gambling with play money (n = 36), and the cost of participation, i.e. what it costs to gamble (n = 35).

2.9 CONSEQUENCES

Fifty participants answered that, generally speaking, they had never had a gambling problem and eight of them stated that they had already faced this type of problem. Of the eight participants, four said that their problems emerged after they had started gambling online and three of them also indicated that being able to engage in online betting caused gambling problems for them.

During the previous year, 54 participants out of 58 said that they had never bet online more than they could truly afford to lose. The four other participants said that they had occasionally bet online more than they could really afford to lose. In response to the question that asked if, during the previous year, people had criticized their online gambling habits or told them that they had a gambling problem, whether or not they thought that it was true, 54 answered that that had never happened to them, three answered sometimes, and one answered most of the time. More than 80% of the participants (n = 48) said that they had never felt guilty during the previous year because of their online gambling habits or the consequences of such habits; seven said that they sometimes felt guilty; two, most of the time; and one, almost always.

Substantially all of the participants (n = 54) said that during the preceding year, online gambling never disturbed their eating habits; 5%, occasionally; and 1.7%, almost always. As for their sleeping habits, 47 participants said that online gambling never disturbed them; nine, sometimes; and two, most of the time or almost always.

2.10 PREVENTION AND TREATMENT

More than 90% of the participants (n = 53/58) said that they had already seen prevention advertisements focusing on gambling during the previous year. Among them, 23 said that the preventive messages broached the question of online gambling. Less than half of the participants (25/58) said that they were aware that questionnaires existed to better ascertain their gambling habits. Among the 25 participants, seven said that they had already completed such a questionnaire, of whom five said that they did so online.

As for self-limitation and session reminder tools, nearly 70% (n = 40) of the participants said that they were familiar with the spending self-limitation system. Of the 40 participants, seven said that they had used it and found it highly effective; five, fairly effective; three, hardly effective; and two, completely ineffective. Two-thirds of the participants (36/58) said that they were familiar with the gambling time self-limitation system. Of the 36 participants, only six said that they used it and found it highly effective (n = 2), fairly effective (n = 2), hardly effective (n = 1) or completely ineffective (n = 1).

Less than one-third of the participants (17/58) said that they had already seen pop-up prevention messages during their online gambling episodes. Among the latter, three found the messages highly effective; three, fairly effective; four, hardly effective; and seven, completely ineffective.

As for the existence of security software such as Betstopper designed to block access to online gambling websites, 18/58 of the participants said that they were familiar with this type of software but none of them said that they had downloaded it. Lastly, one-third of the participants (21/58) said they were aware of the online gambling self-exclusion system (36%). Among those who were aware of its existence, two said that they had already used it.

With respect to problem gambling information, referral and support services, the survey revealed that just over half of the participants (33/58) were familiar with the Gambling: Help and Referral helpline (57%). Among the latter, only one participant said that he had already called the helpline. Ten participants out of 58 said that they were aware of the Gambling: Help and Referral website, but none of them had already submitted an email request to the website. This is in keeping with the fact that no participant said that during his lifetime his online gambling habits had led him to consult one or more resources that offer assistance services for gamblers.

2.11 ESPACEJEUX

During the previous year, nearly half of the participants (27/58) said that they had never bet online on the Espacejeux website. Among the 31 remaining participants, 18 said that they had bet on the website less than once a month; six, once a month (but not every week); five, once a week (but not every day); and two, at least once a day. Among the same 31 gamblers, 16 stated that the launching of the Espacejeux website in no way influenced their gambling habits; three, hardly influenced; six, moderately influenced; and four, strongly influenced.

The follow-up survey asked the participants to indicate the advantages specific to Loto-Québec's Espacejeux website in relation to other online gambling websites. The 31 participants who had bet on the Espacejeux website during the 12 months preceding the survey most frequently mentioned the following advantages: the site's legality (n = 26), its reputation (n = 23), the security of financial data (n = 23), and knowing to whom the website belongs, i.e. who receives the profits that the site generates. Among all of the possible advantages of the Espacejeux website in relation to other online gambling websites, the advantage mentioned as the most important one by the greatest number of participants was knowing to whom the site belongs, i.e. who receives the profits that the site generates (n = 10), followed by the site's legality (n = 5).

2.12 OFFERINGS AND PROMOTION

Nearly three-quarters of the individuals surveyed (46/64) said that being exposed to advertising and promotions devoted to online gambling did not have any impact on their betting incidence. The remainder (n = 17) said that they had the impression that such exposure to advertising and promotions devoted to online gambling encouraged them to bet more. The participants said that they saw such advertising on the Internet (n = 52), through the conventional media such as newspapers, radio or television (n = 50), on TV during sports events (n = 45), by email (n = 40), on billboards (n = 20) or during a sports event that they attended (n = 15). Nearly half of them (31/64) stated that they saw Espacejeux advertising.

2.13 REGULATION

Nearly 60% of the participants (37/64) admitted that they were unaware that the only legal online gambling offering in Québec is that of Espacejeux and that the other online gambling websites were illegal. To the question devoted to regulating online gambling in Québec, half of the participants (n = 31) said that they preferred that the illegal sites be regulated in Québec; 14, that illegal sites be banned, shut down or made inaccessible in the province; 13, that online gambling offerings remain as they are; 13, that there be no regulation of online gambling in Québec; four, that all online gambling websites, including Espacejeux, be banned, shut down or made inaccessible in Québec. All of the participants except four (n = 59) said that in the event that all forms of online gambling were offered legally in Québec, this would have no impact at all on their own online gambling habits.

2.14 RETURN TO THE COMMUNITY

When asked which statement best described their opinion on the benefits and harm that online gambling can engender in society, roughly two-thirds of the participants (n = 41) said that they engender more harm than good; 18, that the benefits and ill effects are more or less equivalent; and five, that they cause more good than harm.

3. CONCLUSION

The study provides follow-up to the online gamblers who participated in the 2012 population-based study and who agreed to a second interview. The sample comprised 64 participants (55 men and nine women), i.e. 54% of the participants in the population-based survey. Some 45% of the sample reported annual income of more than \$70 000.

The sample did not include a single probable pathological gambler and did include 10 gamblers at moderate risk. The vast majority of the participants confirmed that, very often or most of the time, when they gambled, it was simply because they enjoyed doing so or because they found it amusing.

The online gamblers were mainly poker players and they usually played online. During the previous year, nearly half of the participants said that they had never bet online on the Espacejeux website. Typically, substantially all of the participants gambled less than five hours per week. As for spending, 32 participants stated that more than 75% of the money was devoted to online gambling. One participant out of two said that he had lost more money than he had won. Nearly 60% of the participants admitted that they did not know that Espacejeux's offerings are the only legal online gambling offerings in Québec.

With respect to problem gambling information, referral and support services, the survey revealed that just over half of the participants were familiar with the Gambling: Help and Referral helpline (57%). More than 90% of the participants said that they had already seen prevention advertisements focusing on online gambling in the course of the previous year. Less than one-third of the participants said that they

had already seen pop-up prevention messages during their online gambling episodes. Nearly three-quarters of the individuals surveyed said that being exposed to advertising and promotions devoted to online gambling had no impact whatsoever on their betting incidence. The remainder stated that they had the impression that such exposure had encouraged them to bet more.

When the participants were asked which statement best described their opinion on the benefits and harm that online gambling can engender in society, roughly two-thirds of them indicated that it causes more harm than good.

Half of the participants confirmed that they had never consumed alcohol when engaging in online gambling, while nearly one-third said that they did so occasionally, and eight, that they consumed alcohol almost always or most of the time.



APPENDIX 4



APPENDIX 4

SECTIONS FROM LEGISLATION GOVERNING GAMBLING AND BETTING

CRIMINAL CODE OF CANADA

202. (1) Betting, pool-selling, book-making, etc. — Every one commits an offence who

- (a) uses or knowingly allows a place under his control to be used for the purpose of recording or registering bets or selling a pool;
- (b) imports, makes, buys, sells, rents, leases, hires or keeps, exhibits, employs or knowingly allows to be kept, exhibited or employed in any place under his control any device or apparatus for the purpose of recording or registering bets or selling a pool, or any machine or device for gambling or betting;
- (c) has under his control any money or other property relating to a transaction that is an offence under this section;
- (d) records or registers bets or sells a pool;
- (e) engages in book-making or pool-selling, or in the business or occupation of betting, or makes any agreement for the purchase or sale of betting or gaming privileges, or for the purchase or sale of information that is intended to assist in book-making, pool-selling or betting;
- (f) prints, provides or offers to print or provide information intended for use in connection with book-making, pool-selling or betting on any horse-race, fight, game or sport, whether or not it takes place in or outside Canada or has not taken place;
- (g) imports or brings into Canada any information or writing that is intended or is likely to promote or be of use in gambling, book-making, pool-selling or betting on a horse-race, fight, game or sport, and where this paragraph applies it is immaterial
 - (i) whether the information is published before, during or after the race, fight game or sport, or
 - (ii) whether the race, fight, game or sport takes place in Canada or elsewhere,

but this paragraph does not apply to a newspaper, magazine or other periodical published in good faith primarily for a purpose other than the publication of such information;

- (h) advertises, prints, publishes, exhibits, posts up, or otherwise gives notice of any offer, invitation or inducement to bet on, to guess or to foretell the result of a contest, or a result of or contingency relating to any contest;
- (i) wilfully and knowingly sends, transmits, delivers or receives any message that conveys any information relating to book-making, pool-selling, betting or wagering, or that is intended to assist in book-making, pool-selling, betting or wagering; or;
- (j) aids or assists in any manner in anything that is an offence under this section.

(2) Every one who commits an offence under this section is guilty of an indictable offence and liable

- (a) for a first offence, to imprisonment for not more than two years;
- (b) for a second offence, to imprisonment for not more than two years and not less than fourteen days; and
- (c) for each subsequent offence, to imprisonment for not more than two years and not less than three months.

R.S., 1985, c. C-46, s. 202; 2008, c. 18, s. 5.



206. (1) Every one is guilty of an indictable offence and liable to imprisonment for a term not exceeding two years who

- (a) makes, prints, advertises or publishes, or causes or procures to be made, printed, advertised or published, any proposal, scheme or plan for advancing, lending, giving, selling or in any way disposing of any property by lots, cards, tickets or any mode of chance whatever;
- (b) sells, barter, exchanges or otherwise disposes of, or causes or procures, or aids or assists in, the sale, barter, exchange or other disposal of, or offers for sale, barter or exchange, any lot, card, ticket or other means or device for advancing, lending, giving, selling or otherwise disposing of any property by lots, tickets or any mode of chance whatever;
- (c) knowingly sends, transmits, mails, ships, delivers or allows to be sent, transmitted, mailed, shipped or delivered, or knowingly accepts for carriage or transport or conveys any article that is used or intended for use in carrying out any device, proposal, scheme or plan for advancing, lending, giving, selling or otherwise disposing of any property by any mode of chance whatever;
- (d) conducts or manages any scheme, contrivance or operation of any kind for the purpose of determining who, or the holders of what lots, tickets, numbers or chances, are the winners of any property so proposed to be advanced, lent, given, sold or disposed of;
- (e) conducts, manages or is a party to any scheme, contrivance or operation of any kind by which any person, on payment of any sum of money, or the giving of any valuable security, or by obligating himself to pay any sum of money or give any valuable security, shall become entitled under the scheme, contrivance or operation to receive from the person conducting or managing the scheme, contrivance or operation, or any other person, a larger sum of money or amount of valuable security than the sum or amount paid or given, or to be paid or given, by reason of the fact that other persons have paid or given, or obligated themselves to pay or give any sum of money or valuable security under the scheme, contrivance or operation;
- (f) disposes of any goods, wares or merchandise by any game of chance or any game of mixed chance and skill in which the contestant or competitor pays money or other valuable consideration;
- (g) induces any person to stake or hazard any money or other valuable property or thing on the result of any dice game, three-card monte, punch board, coin table or on the operation of a wheel of fortune;
- (h) for valuable consideration carries on or plays or offers to carry on or to play, or employs any person to carry on or play in a public place or a place to which the public have access, the game of three-card monte;
- (i) receives bets of any kind on the outcome of a game of three-card monte; or
- (j) being the owner of a place, permits any person to play the game of three-card monte therein.

(2) In this section, “three-card monte” means the game commonly known as three-card monte and includes any other game that is similar to it, whether or not the game is played with cards and notwithstanding the number of cards or other things that are used for the purpose of playing.

(3) Paragraphs (1)(f) and (g), in so far as they do not relate to a dice game, three-card monte, punch board or coin table, do not apply to the board of an annual fair or exhibition, or to any operator of a concession leased by that board within its own grounds and operated during the fair or exhibition on those grounds.

(3.1) For the purposes of this section, “fair or exhibition” means an event where agricultural or fishing products are presented or where activities relating to agriculture or fishing take place.

(4) Every one who buys, takes or receives a lot, ticket or other device mentioned in subsection (1) is guilty of an offence punishable on summary conviction.

(5) Every sale, loan, gift, barter or exchange of any property, by any lottery, ticket, card or other mode of chance depending on or to be determined by chance or lot, is void, and all property so sold, lent, given, bartered or exchanged is forfeited to Her Majesty.

(6) Subsection (5) does not affect any right or title to property acquired by any *bona fide* purchaser for valuable consideration without notice.

(7) This section applies to the printing or publishing, or causing to be printed or published, of any advertisement, scheme, proposal or plan of any foreign lottery, and the sale or offer for sale of any ticket, chance or share, in any such lottery, or the advertisement for sale of such ticket, chance or share, and the conducting or managing of any such scheme, contrivance or operation for determining the winners in any such lottery.

(8) This section does not apply to

- (a) the division by lot or chance of any property by joint tenants or tenants in common, or persons having joint interests in any such property; or
- (b) [Repealed, 1999, c. 28, s. 156]
- (c) bonds, debentures, debenture stock or other securities recallable by drawing of lots and redeemable with interest and providing for payment of premiums on redemption or otherwise.

R.S., 1985, c. C-46, s. 206; R.S., 1985, c. 52 (1st Supp.), s. 2; 1999, c. 28, s. 156.

207. (1) Notwithstanding any of the provisions of this part relating to gaming and betting, it is lawful

- (a) for the government of a province, either alone or in conjunction with the government of another province, to conduct and manage a lottery scheme in that province, or in that and the other province, in accordance with any law enacted by the legislature of that province;
- (b) for a charitable or religious organization, pursuant to a licence issued by the Lieutenant Governor in Council of a province or by such other person or authority in the province as may be specified by the Lieutenant Governor in Council thereof, to conduct and manage a lottery scheme in that province if the proceeds from the lottery scheme are used for a charitable or religious object or purpose;
- (c) for the board of a fair or of an exhibition, or an operator of a concession leased by that board, to conduct and manage a lottery scheme in a province where the Lieutenant Governor in Council of the province or such other person or authority in the province as may be specified by the Lieutenant Governor in Council thereof has
 - (i) designated that fair or exhibition as a fair or exhibition where a lottery scheme may be conducted and managed, and
 - (ii) issued a licence for the conduct and management of a lottery scheme to that board or operator;
- (d) for any person, pursuant to a licence issued by the Lieutenant Governor in Council of a province or by such other person or authority in the province as may be specified by the Lieutenant Governor in Council thereof, to conduct and manage a lottery scheme at a public place of amusement in that province if
 - (i) the amount or value of each prize awarded does not exceed five hundred dollars, and
 - (ii) the money or other valuable consideration paid to secure a chance to win a prize does not exceed two dollars;
- (e) for the government of a province to agree with the government of another province that lots, cards or tickets in relation to a lottery scheme that is by any of paragraphs (a) to (d) authorized to be conducted and managed in that other province may be sold in the province;

- (f) for any person, pursuant to a licence issued by the Lieutenant Governor in Council of a province or such other person or authority in the province as may be designated by the Lieutenant Governor in Council thereof, to conduct and manage in the province a lottery scheme that is authorized to be conducted and managed in one or more other provinces where the authority by which the lottery scheme was first authorized to be conducted and managed consents thereto;
- (g) for any person, for the purpose of a lottery scheme that is lawful in a province under any of paragraphs (a) to (f), to do anything in the province, in accordance with the applicable law or licence, that is required for the conduct, management or operation of the lottery scheme or for the person to participate in the scheme; and
- (h) for any person to make or print anywhere in Canada or to cause to be made or printed anywhere in Canada anything relating to gaming and betting that is to be used in a place where it is or would, if certain conditions provided by law are met, be lawful to use such a thing, or to send, transmit, mail, ship, deliver or allow to be sent, transmitted, mailed, shipped or delivered or to accept for carriage or transport or convey any such thing where the destination thereof is such a place.

(2) Subject to this Act, a licence issued by or under the authority of the Lieutenant Governor in Council of a province as described in paragraph (1)(b), (c), (d) or (f) may contain such terms and conditions relating to the conduct, management and operation of or participation in the lottery scheme to which the licence relates as the Lieutenant Governor in Council of that province, the person or authority in the province designated by the Lieutenant Governor in Council thereof or any law enacted by the legislature of that province may prescribe.

(3) Every one who, for the purposes of a lottery scheme, does anything that is not authorized by or pursuant to a provision of this section

- (a) in the case of the conduct, management or operation of that lottery scheme,
 - (i) is guilty of an indictable offence and liable to imprisonment for a term not exceeding two years, or
 - (ii) is guilty of an offence punishable on summary conviction; or
- (b) in the case of participating in that lottery scheme, is guilty of an offence punishable on summary conviction.

(4) In this section, “lottery scheme” means a game or any proposal, scheme, plan, means, device, contrivance or operation described in any of paragraphs 206(1)(a) to (g), whether or not it involves betting, pool selling or a pool system of betting other than

- (a) three-card monte, punch board or coin table;
- (b) bookmaking, pool selling or the making or recording of bets, including bets made through the agency of a pool or pari-mutuel system, on any race or fight, or on a single sport event or athletic contest; or
- (c) for the purposes of paragraphs (1)(b) to (f), a game or proposal, scheme, plan, means, device, contrivance or operation described in any of paragraphs 206(1)(a) to (g) that is operated on or through a computer, video device or slot machine, within the meaning of subsection 198(3), or a dice game.

(5) For greater certainty, nothing in this section shall be construed as authorizing the making or recording of bets on horse-races through the agency of a pari-mutuel system other than in accordance with section 204.

R.S., 1985, c. C-46, s. 207; R.S., 1985, c. 27 (1st Supp.), s. 31, c. 52 (1st Supp.), s. 3; 1999, c. 5, s. 6.

HIGHLIGHTS

- From the standpoint of online gambling, section 207(4)(c) of the *Criminal Code of Canada* stipulates that only a province may set up and operate a lottery or a game of chance on or through a computer.
- In Canada, all forms of lotteries and gambling and all accessory activities linked to their operation are criminal acts that render those who operate them or those who aid and abet them liable to a prison sentence of two years.
- Section 207 of the *Criminal Code of Canada* establishes certain exceptions to this general prohibition. For example, a province may (1) conduct and manage a lottery scheme in that province; and (2) issue licences to a charitable or religious organization that wishes to conduct and manage a lottery scheme for a charitable or religious object or purpose.



APPENDIX 5





APPENDIX 5

THE CONSULTATIONS

1. MEETINGS OF THE WORKING GROUP ON ONLINE GAMBLING

Date and place of the meeting	Participants from the Working Group	Contacts	Purpose of the meeting
September 21, 2010 Montréal	The Working Group ⁸¹	<ul style="list-style-type: none"> • Alain Cousineau, President and CEO, Loto-Québec • Marcel Croux, First Vice-President, Corporate Management, Loto-Québec • Marie-Claude Rivest, Director of Communications, Loto-Québec • François Poulin, Espacejeux Project Manager, Loto-Québec • Josée Leroux, Director, Finance and Control, Espacejeux, Loto-Québec • Serge Decary, Director of Information Technologies, Espacejeux, Loto-Québec • Alain Brosseau, Business Manager, Espacejeux, Loto-Québec 	Presentation of the Espacejeux project to the members of the Working Group
November 4, 2010 Montréal	The Working Group	<ul style="list-style-type: none"> • Professor Jeffrey Derevensky, McGill University Department of Psychiatry 	Young people and gambling
November 5, 2010 Montréal	The Working Group	<ul style="list-style-type: none"> • Marcel Croux, First Vice-President, Corporate Management, Loto-Québec • François Poulin, Espacejeux Project Manager, Loto-Québec • Thierry Abel, business analyst, Loto-Québec • Serge Decary, Director of Information Technologies, Espacejeux, Loto-Québec 	Presentation of the Espacejeux website

⁸¹ The Working Group comprised Louise Nadeau, Magali Dufour, Richard Guay, Sylvia Kairouz, Lynne Duguay and Catherine Paradis.

Date and place of the meeting	Participants from the Working Group	Contacts	Purpose of the meeting
November 12, 2010 Montréal	Louise Nadeau, Sylvia Kairouz and Catherine Paradis	<ul style="list-style-type: none"> Alain Cousineau, President and CEO, Loto-Québec 	Request for access to Espacejeux data
December 13, 2010 Montréal	The Working Group ⁸²	<ul style="list-style-type: none"> Yi Shen, PhD student, Département de psychologie, Université de Montréal Julien Archambault, online poker player 	Types of gamblers
December 20, 2010 Montréal	Louise Nadeau and Catherine Paradis	<ul style="list-style-type: none"> Alain Cousineau, President and CEO, Loto-Québec 	Delivery of the documents requested on November 12
March 24, 2010 Montréal	The Working Group	<ul style="list-style-type: none"> Raymonde St-Germain, Québec Ombudsman Louise Rousseau, Director of Studies and Mandates, Office of the Ombudsman 	Concerns about online gambling
March 31, 2011 Montréal	Louise Nadeau and Catherine Paradis	<ul style="list-style-type: none"> Alain Cousineau, President and CEO, Loto-Québec Marcel Croux, First Vice-President, Corporate Management, Loto-Québec 	Request for access to specific Espacejeux data Advertising for illegal websites
May 22 to 24, 2011 Ostersund, Sweden	Louise Nadeau, Sylvia Kairouz and Catherine Paradis	<ul style="list-style-type: none"> Marie Risbeck, researcher, Swedish National Institute of Public Health (SNIPH) Jan Cedervärn, Director General, SNIPH Ulla Romild, Planning Agent, SNIPH Jessika Svensson, PhD candidate, SNIPH Thomas Jacobsson, researcher, SNIPH 	The development of online gambling in Sweden The impact of Svenska Spel's offerings on the prevalence of online gambling and related problems in the population Governance and, indeed, the reconciliation of economic and public health interests from the standpoint of gambling
November 23 and 24, 2011 Paris, France	Louise Nadeau, Sylvia Kairouz, Magali Dufour and Catherine Paradis	<ul style="list-style-type: none"> Charles Coppolani, Chef du service du Contrôle général économique et financier and President of the Observatoire des jeux de la France (ODJ) Jean-Michel Costes, ODJ Jeanne Etienne, Honorary Director, Institut national de la santé et de la recherche médicale 	The implementation of a gambling monitoring system
December 12, 2011 Montréal	The Working Group	<ul style="list-style-type: none"> Sarah E. Nelson, Assistant Professor, Harvard Department of Psychiatry 	Identification by behavioural markers of problematical online gamblers

⁸² As of December 13, 2010, the Working Group comprised Louise Nadeau, Magali Dufour, Richard Guay, Sylvia Kairouz, Jean-Marc Ménard (who replaced Lynne Duguay) and Catherine Paradis.

** Travel, living and conference expenses were covered by personal research funds.

Date and place of the meeting	Participants from the Working Group	Contacts	Purpose of the meeting
February 20-24, 2012 Montréal	Louise Nadeau, Magali Dufour, Richard Guay, Sylvia Kairouz* and Catherine Paradis	<ul style="list-style-type: none"> • Ingo Fiedler, postdoctoral researcher, University of Hamburg Department of Economics and Law 	The prevalence of online gambling on illegal websites
April 11, 2012 Banff, Alberta	Louise Nadeau, Magali Dufour, Sylvia Kairouz* and Catherine Paradis	<ul style="list-style-type: none"> • Ulla Romild, planning officer, SNIPH • Thomas Jacobsson, researcher, SNIPH 	Changes in online gambling in Sweden
May 8 and 9, 2012 Birmingham, UK	Louise Nadeau, Richard Guay and Catherine Paradis	<ul style="list-style-type: none"> • Phillip Graf, Chairman, Gambling Commission • Jenny Williams, Chief Executive and Commissioner, Gambling Commission • Nick Tofiluk, Director of Operations, Gambling Commission • Paul Morris, Senior Manager for Remote Gambling, Gambling Commission • Dawn Best, Licensing Manager, Gambling Commission • Ruth Callaghan, Secretary, Responsible Gambling Strategy Board, Gambling Commission • Jonathan Watkin, Policy Development Officer, Gambling Commission • Richard Bayliss, Remote Gambling Compliance Manager, Gambling Commission 	The British online gambling regulation and surveillance model
February 1, 2012 Montréal	Louise Nadeau	<ul style="list-style-type: none"> • Gérard Bibeau, President and CEO, Loto-Québec 	Presentation meeting Review of context and objectives
June 5, 2012 Montréal	Louise Nadeau and Catherine Paradis	<ul style="list-style-type: none"> • Gérard Bibeau, President and CEO, Loto-Québec 	Presentation on the advancement of the Working Group's deliberations
June 6, 2012 Montréal	Louise Nadeau and Catherine Paradis	<ul style="list-style-type: none"> • François Poulin, Director, Espacejeux, Loto-Québec • Louise Dostie, Director of Communications, Société des casinos du Québec, Loto-Québec • Germain Guitor, Vice President Sales and Marketing, Société des casinos du Québec, Loto-Québec 	Changes in the evaluation plan respecting Espacejeux's responsible gambling strategy since its implementation
June 12, 2012 Montréal	Richard Guay	<ul style="list-style-type: none"> • Inspector Michel Pelletier, Section d'enquête sur le crime organisé, Sûreté du Québec • Alexandre Héroux, investigator, Sûreté du Québec 	Discussion of the involvement of criminal organizations and the question of money laundering in online gambling

* AGRI paid the travel, living expenses and conference expenses.

Date and place of the meeting	Participants from the Working Group	Contacts	Purpose of the meeting
June 27, 2012 Austin, Texas	Magali Dufour and Richard Guay	<ul style="list-style-type: none"> • Brigitte Sands, President, Danish Gambling Authority 	The new Danish online gambling regulatory and surveillance model
September 25, 2012 Paris, France	Louise Nadeau, Richard Guay, Sylvia Kairouz and Catherine Paradis	<ul style="list-style-type: none"> • Jean-François Vilotte, President, Autorité de Régulation des Jeux en Ligne de la France (ARJEL) • Frédéric Epaulard, Director General, ARJEL • Gilles Crespin, Assistant Director General, ARJEL • Frédéric Guerchoun, Directeur juridique et des relations internationales adjoint, ARJEL • Clément Martin-Saint Leon, Directeur des agréments et de la supervision, ARJEL • Philippe Brandt, Directeur des systèmes d'information et de l'évaluation, ARJEL • Gaëlle Menu-Lejeune, Directeur des enquêtes et contrôles, ARJEL • Caroline Larlus-Lefebvre, responsable du Département sport, Direction juridique et des relations internationales, ARJEL 	The French online gambling regulatory and surveillance model
October 17, 2012 Montréal	Louise Nadeau, Magali Dufour, Richard Guay, Jean-Marc Ménard and Catherine Paradis	<ul style="list-style-type: none"> • Christine Ellefsen, President, Régie des alcools, des courses et des jeux du Québec • Monique Nadeau, Direction des affaires juridiques, Régie des alcools, des courses et des jeux du Québec 	The regulation of online gambling in Québec
November 1, 2012 Montréal	Louise Nadeau, Magali Dufour, Richard Guay, Sylvia Kairouz* and Catherine Paradis	<ul style="list-style-type: none"> • Lyne Jobin, responsable de la Direction de la surveillance de l'état de santé • Julie Soucy, responsable de la Direction de la planification, de l'évaluation et du développement en santé publique 	Presentation on the online gambling monitoring project
February 15, 2013 Montréal	Louise Nadeau and Catherine Paradis	<ul style="list-style-type: none"> • Lyne Roiter, Secretary General and Vice-President, Direction juridique, Loto-Québec • Germain Guitor, Vice President Sales and Marketing, Société des casinos du Québec, Loto-Québec • Alfonso Troisi, Director, Direction Intelligence d'Affaires, Société des casinos du Québec, Loto-Québec • Guylaine Rioux, Vice-President, Jeu responsable, Loto-Québec 	Validation of the analysis of Espacejeux data
February 19, 2013 Québec City	Louise Nadeau, Sylvia Kairouz, Magali Dufour and Catherine Paradis	<ul style="list-style-type: none"> • Simon Bergern, Assistant Deputy Minister, Budgetary Policy • Jacques Caron, responsable de la Direction générale de l'organisation financière et du suivi des opérations budgétaires et non budgétaires • Lucie Lépine, Director, Direction de l'organisation financière et des sociétés d'État • Denis Dufour, observer from the Ministère des Finances du Québec 	Presentation on the advancement of the Working Group's deliberations

Date and place of the meeting	Participants from the Working Group	Contacts	Purpose of the meeting
April 2, 2013 Banff, Alberta	Louise Nadeau, Sylvia Kairouz**, Magali Dufour and Catherine Paradis	<ul style="list-style-type: none"> • Professor Robert Williams, Department of Psychology, University of Lethbridge • Jean-Michel Costes, ODJ 	Working conference: the logical model of the online gambling monitoring plan
April 4, 2013 Québec City	Richard Guay	<ul style="list-style-type: none"> • Yves Morency, Associate Deputy Minister, Police Affairs, Ministère de la Sécurité publique • Clément Robitaille, Team Manager, Direction de la Sécurité de l'État, Ministère de la Sécurité publique 	General presentation on the Working Group's deliberations
May 13-15, 2013 Paris, France	Sylvia Kairouz and Catherine Paradis	<ul style="list-style-type: none"> • Charles Coppolani, Chef du service du Contrôle général économique et financier and President of the ODJ • Jean-Michel Costes, ODJ • Gautier Geiben, responsable de la Direction du Budget, Ministère de l'Économie et des Finances • Olivier Meilland, chef de bureau, Direction du Budget, Ministère de l'Économie et des Finances 	Working conference : the logical model of the online gambling monitoring plan
June 20-21, 2013 Montréal	Louise Nadeau, Magali Dufour, Richard Guay, Sylvia Kairouz* and Catherine Paradis	<ul style="list-style-type: none"> • Jean-Michel Costes, ODJ • Jeanne Etiemble, Honorary Director, Institut national de la santé et de la recherche médicale 	Working meeting: the logical model of the online gambling monitoring plan
July 10, 2013 Québec City	Louise Nadeau, Sylvia Kairouz, Jean-Marc Ménard and Catherine Paradis	<ul style="list-style-type: none"> • Lyne Jobin, responsable de la Direction de la planification, de l'évaluation et du développement en santé publique and Direction de la surveillance de l'état de santé • Lynne Duguay, responsable de la Direction des dépendances et de l'itinérance • Julie Soucy, research officer, Direction générale adjointe de la santé publique • Andrea Bilodeau, planning, programming and research officer, Direction générale adjointe de la santé publique • Marie-Sophie Godin, planning, programming and research officer, Direction des dépendances et de l'itinérance 	Presentation of the logical model of the online gambling monitoring plan
July 11-12, 2013 Montréal	Louise Nadeau, Magali Dufour, Richard Guay, Sylvia Kairouz* and Catherine Paradis	<ul style="list-style-type: none"> • Tim Stockwell, Director, Centre for Addictions Research of British Columbia 	Working meeting: the logical model of the online gambling monitoring plan

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** Travel, living and conference expenses were covered by personal research funds.

Date and place of the meeting	Participants from the Working Group	Contacts	Purpose of the meeting
September 3, 2013 Telephone conference call	Richard Guay	<ul style="list-style-type: none"> • Richard Windeyer, First Assistant Secretary, Digital Strategy Division, Australian Department of Broadband Communications and the Digital Economy • Rohan Buettel, Assistant Secretary, Cyber Safety and Security, Department of Communications • Steven Zorzi, Director, Online Gambling and Regulatory Section, Australian Department of Broadband Communications and the Digital Economy 	Discussion of recent amendments to the Australian <i>Internet Gaming Act</i>
September 4, 2013 Telephone conference call	Richard Guay	<ul style="list-style-type: none"> • Philip Shelton, Special Advisor, National Gambling Policy and Legislation Branch, Australia 	Discussion of recent amendments to the Australian <i>Internet Gaming Act</i>
September 5, 2013 Telephone conference call	Richard Guay	<ul style="list-style-type: none"> • Richard Chin, High-Tech Crime Investigations Coordinator, Australian Federal Police 	Discussion of investigations in Australia of the presence of criminal organizations and money laundering in online gambling
September 30, 2013 Oslo, Norway	Catherine Paradis and Richard Guay	<ul style="list-style-type: none"> • A.G. Burnett, Chairman, Nevada State Gaming Control Board 	Online gambling regulations in Nevada
October 2, 2013 Oslo, Norway	Catherine Paradis and Richard Guay	<ul style="list-style-type: none"> • Francesco Rodano, Head, Remote Gaming Agency, Italy 	Online gambling regulations in Italy
October 2, 2013 Oslo, Norway	Catherine Paradis and Richard Guay	<ul style="list-style-type: none"> • Birgitte Sands, Director, Danish Gambling Authority 	Online gambling regulations in Denmark
October 4, 2013 Oslo, Norway	Catherine Paradis and Richard Guay	<ul style="list-style-type: none"> • Jenny Williams, Chief Executive and Commissioner, Gambling Commission 	Online gambling regulations in the United Kingdom
November 14, 2013 Montréal	The Working Group	<ul style="list-style-type: none"> • Québec Minister of Finance Nicolas Marceau • Jean-François Gibeault, Chief of Staff, Office of the Québec Minister of Finance • Luc Joli-Cœur, Political Attaché, Québec Minister of Finance • Simon Bergeron, Assistant Deputy Minister, Budgetary Policy • Lucie Lépine, Director, Direction de l'organisation financière et des sociétés d'État • Denis Dufour, observer from the Ministère des Finances du Québec 	Presentation of the advancement of the Working Group's deliberations

2. REGULAR MEETINGS OF THE WORKING GROUP ON ONLINE GAMBLING

1	September 20-21, 2010
2	November 4-5, 2010
3	December 13-14, 2010
4	February 15, 2011 (telephone conference call)
5	March 24-25, 2011
6	May 2-3, 2011
7	July 6, 2011
8	August 22, 2011 (telephone conference call)
9	September 27, 2011
10	December 6-7, 2011
11	February 21, 2012
12	April 23-24, 2012
13	May 21, 2012 (telephone conference call)
14	June 11, 2012
15	August 15, 2012

16	November 1, 2012
17	February 28 and March 1, 2013
18	April 29-30, 2013
19	June 11, 2013
20	July 3, 4 and 5, 2013
21	August 5-6, 2013
22	October 8, 2013
23	October 29-30, 2013
24	November 20, 2013
25	December 9-11, 2013
26	January 8-10, 2014
27	January 22-24, 2014
28	February 10-11, 2014
29	March 18, 2014

3. CONFERENCES IN WHICH THE MEMBERS OF THE WORKING GROUP ON ONLINE GAMBLING PARTICIPATED

Date	Participants from the Working Group	Conference	Place
April 8-9, 2011	Louise Nadeau, Sylvia Kairouz**, Magali Dufour** and Catherine Paradis	Annual Conference of the Alberta Gambling Research Institute	Banff, Alberta
June 6-10, 2011	Magali Dufour and Richard Guay	Annual Training and Education Symposium of the North American Gaming Regulators Association	San Diego, California
October 2-4, 2011	Louise Nadeau, Jean-Marc Ménard and Catherine Paradis	12th Annual Conference on Gambling and Addiction of the National Center for Responsible Gaming	Las Vegas, Nevada
April 13-14, 2012	Louise Nadeau, Sylvia Kairouz**, Magali Dufour** and Catherine Paradis	Annual Conference of the Alberta Gambling Research Institute	Banff, Alberta
June 25-29, 2012	Magali Dufour and Richard Guay	Annual Training and Education Symposium of the North American Gaming Regulators Association	Austin, Texas
September 18-21, 2012	Louise Nadeau, Sylvia Kairouz, Magali Dufour** and Catherine Paradis	9th European Conference on Gambling Studies and Policy Issues of the European Association for the Study of Gambling	Loutraki, Greece
October 21-24, 2012	Richard Guay	International Association of Gaming Regulators	Singapore, Republic of Singapore
April 5-6, 2013	Louise Nadeau, Sylvia Kairouz**, Magali Dufour** and Catherine Paradis	Annual Conference of the Alberta Gambling Research Institute	Banff, Alberta
May 27-31, 2013	Sylvia Kairouz** and Catherine Paradis	Gambling and Risk Taking Conference	Las Vegas, Nevada
June 3-7, 2013	Magali Dufour and Richard Guay	Annual Training and Education Symposium of the North American Gaming Regulators Association	Virginia Beach, Virginia
June 26, 2013	Richard Guay	Canadian Association of Gaming Regulatory Agencies	Toronto, Ontario
September 29 to October 2, 2013	Richard Guay and Catherine Paradis	International Association of Gaming Regulators	Oslo, Norway
October 1-4, 2013	Richard Guay and Catherine Paradis	International Masters of Gaming Law Conference	Oslo, Norway

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