QUANTITATIVE 2023

OLG GENERATION RESEARCH

UNITY INSIGHTS

PURPOSE

OLG WILL CONNECT WITH ALL GENERATIONS

The purpose of this research is to gain an understanding of all generations, and age groups. **WHO THEY ARE, WHAT THEY DO AND HOW OLG CAN CONNECT.** The learnings may surprise you.

UNITY INSIGHTS

RESEARCH OBJECTIVES

1. **CURRENT STATE MARKET**: Understanding participation and attitudes towards OLG's LOBs including a perspective on awareness, relevancy, consideration, and usage .
2. **VALUES, IDENTITIES, LIFESTYLES:** Understanding the identities (individual and collective), values, lifestyles and 'what makes them tick'.
3. **CONSUMER NEEDS STATES:** Quantifying needs states, both emotional and functional, and understanding if and how needs states relate to OLG gaming activities and non-OLG activities.
4. **MOTIVATIONS AND BARRIERS:** Identifying motivations and barriers for OLG gaming participation and spend.
5. **PROFILES:** Creating a demographic profile

METHODOLOGY

1. **DATA COLLECTION**: Online survey via 3rd party panel, July 25 to August 6, 2023.
2. **TARGET SAMPLE:** General Population Panel via SAGO, Residents of Ontario, Adults aged 18-77 yrs., not enrolled in a Voluntary Self-Exclusion program.
3. **QUOTAS**: Age: N=3,000 for 18-34 yrs., N=2,000 for 35-77 yrs.
4. **SAMPLE SIZE**: N=5,161; with n=3,012 among 18-34yrs and n=2,149 among 35-77yrs.
5. **WEIGHTING**: Data was weighted to ensure it was representative of the Canadian population based on age, gender and region.

INSIGHTS SUMMMARY

XXX

CESAR, I believe the report confirms you hypothesis and structure you had sent over…before I right this let me know if there is anything you want me to focus on.

OLG PLAYER PROFILE

PLAYER VS. NON-PLAYER DYNAMICS: GET, GROW, KEEP

This section provides profiles of OLG's current player base as well as non-players, offering an initial perspective into an enterprise customer strategy.

ONTARIO GAMING LANDSCAPE

100%
Ontarians Aged 18+, **12.3M**

- **94%**
  Aware of Gaming, **11.6M**
  - **75%**
    OLG Players, **9.2M**
    - 
      27%
      Under 35 years
      2.5M
    - 
      73%
      35 years or older
      6.7M
  - **25%**
    OLG Non-Players, **3.1M**
    - 
      34%
      Under 35 years
      1.1M
    - 
      66%
      35 years or older
      2.0M
- **6%**
  Not aware of Gaming, **0.7M**

76% , 7.0M
Intend to play in the
next 6 months

6%, 186K
Intend to play in the
next 6 months

Almost all adult Ontarians are aware of gaming and three-in-four have participated in OLG gaming offerings in the past year. However, 2.2M players (24%), do not intend to play in the next 6 months. This suggest the retention opportunity is almost as large as the acquisition opportunity of 3.1M.

OLG Enterprise Past 12 Month Participation

75%

Past Year Enterprise Incidence (At least one product)

LOTTERY	**70%**
OLG.CA ONLINE GAMING	**42%**
CASINO & SLOTS	**29%**
SPORTS	**25%**
HORSE RACING	**18%**
CHARITABLE GAMING	**16%**

12.3M Ontarians 18+

9.2M PLAYERS

With **75%** of the adult population engaging with at least one of OLG's enterprise product offerings in the past year, the focus for the player is clearly not about acquisition but rather **retention** and **expansion**. Identifying **specific objectives** for each player group will be **crucial.**

3.1M NON-PLAYERS

From a holistic perspective, it's evident that Lottery stands out as the product offering through which OLG can thrive from a player participation point of view compared to other products. This doesn't imply that acquisition opportunities are absent for Lottery; instead, it presents an opportunity to precisely define acquisition goals for each product offering.

Base: All Respondent (n= 5,161)
A1 - When was the last time you participated in each of the following activities?

Intention to Play among Players of OLG Games by Age

76%

% of OLG players who intend to play in the next 6 months

	Under 35 years	35 years or older
LOTTERY	72%	77%
OLG.CA ONLINE GAMING	62%	36%
CASINO & SLOTS	31%	18%
SPORTS	46%	18%
HORSE RACING	31%	12%
CHARITABLE GAMING	30%	9%

Retention Focus! Almost a quarter of OLG players don’t intend to continuing playing in the next 6 months.

Regardless of age, retention is something that OLG should be mindful of as they think about planning their holistic consumer strategy. However, among players who intend to continue to engage with OLG offerings, the younger age group seems more engaged with OLG’s Sports, Online, Horse Racing and Charitable Gaming offerings. This suggests that OLG’s existing customer retention offerings in those LOBS have been more relevant to U35 markets. For Lottery, the trend is reverse, suggesting a potential challenge in the long run to keep current younger players engaged.

Base: OLG Players (n=3,850)
O4. How likely are you to play/purchase any of the following in the next 6 months?

Intention to Play among Non-Players of OLG Games

6%

% of OLG Non-players who intend to play in the next 6 months

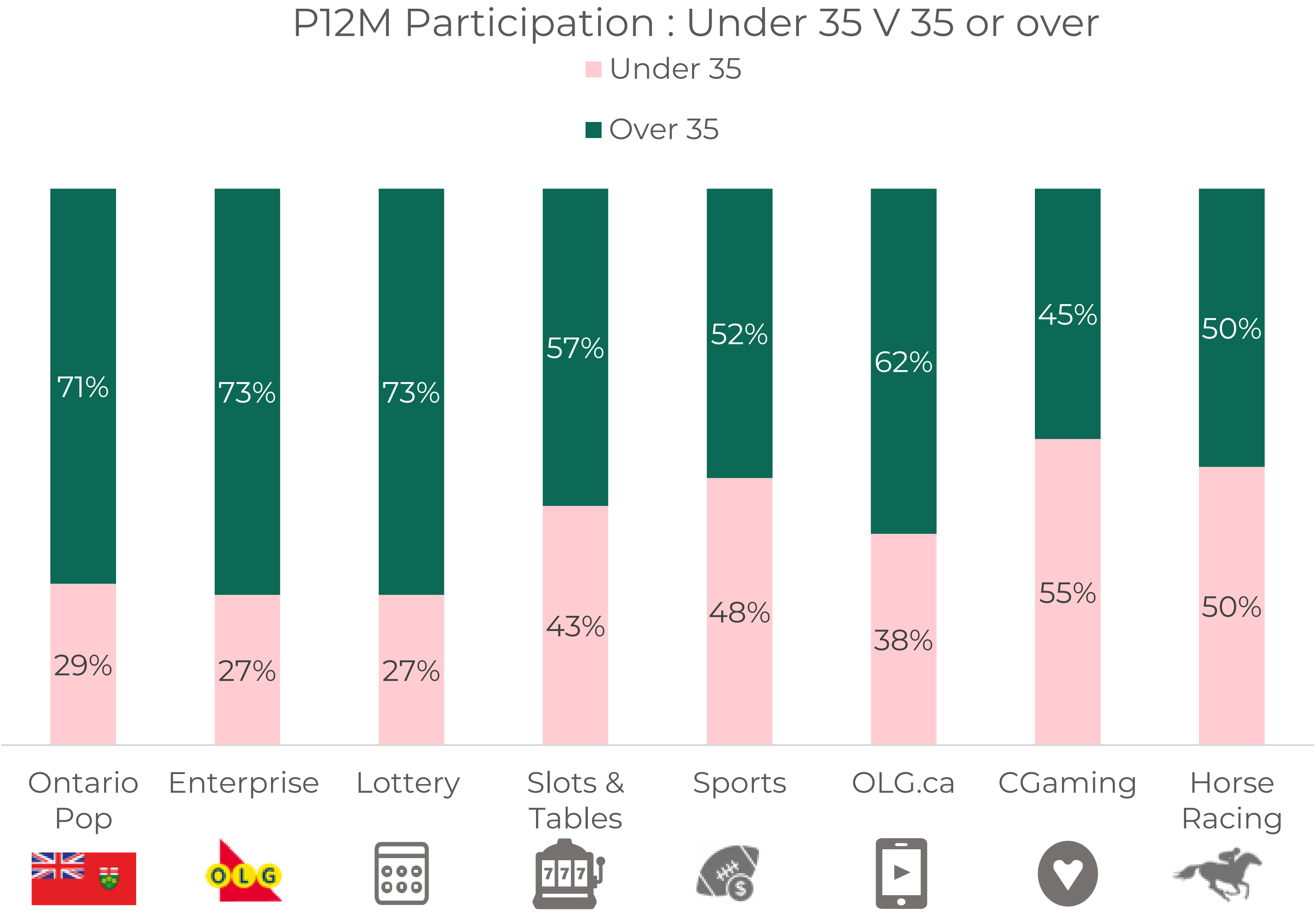
	Under 35 years	35 years or older
LOTTERY	5%	3%
OLG.CA ONLINE GAMING	4%	2%
CASINO & SLOTS	2%	1%
SPORTS	1%	1%
HORSE RACING	1%	1%
CHARITABLE GAMING	1%	0%

Intention scores for non-players highlights the challenge with potential conversion.

When it comes to acquisition, only 6% of Non-players are intending to engage with at least one OLG offering. This lack of consideration suggest a need to connect with these non-players differently. To help support an initial understanding of the opportunity from an identify perspective will be explored in the following slides from a U35/O35 and as well as player/non-player lens.

Base: OLG Non-Players (n=1,311)
O4. How likely are you to play/purchase any of the following in the next 6 months?

OLG Past 12 Month Player Profile U35 vs O35



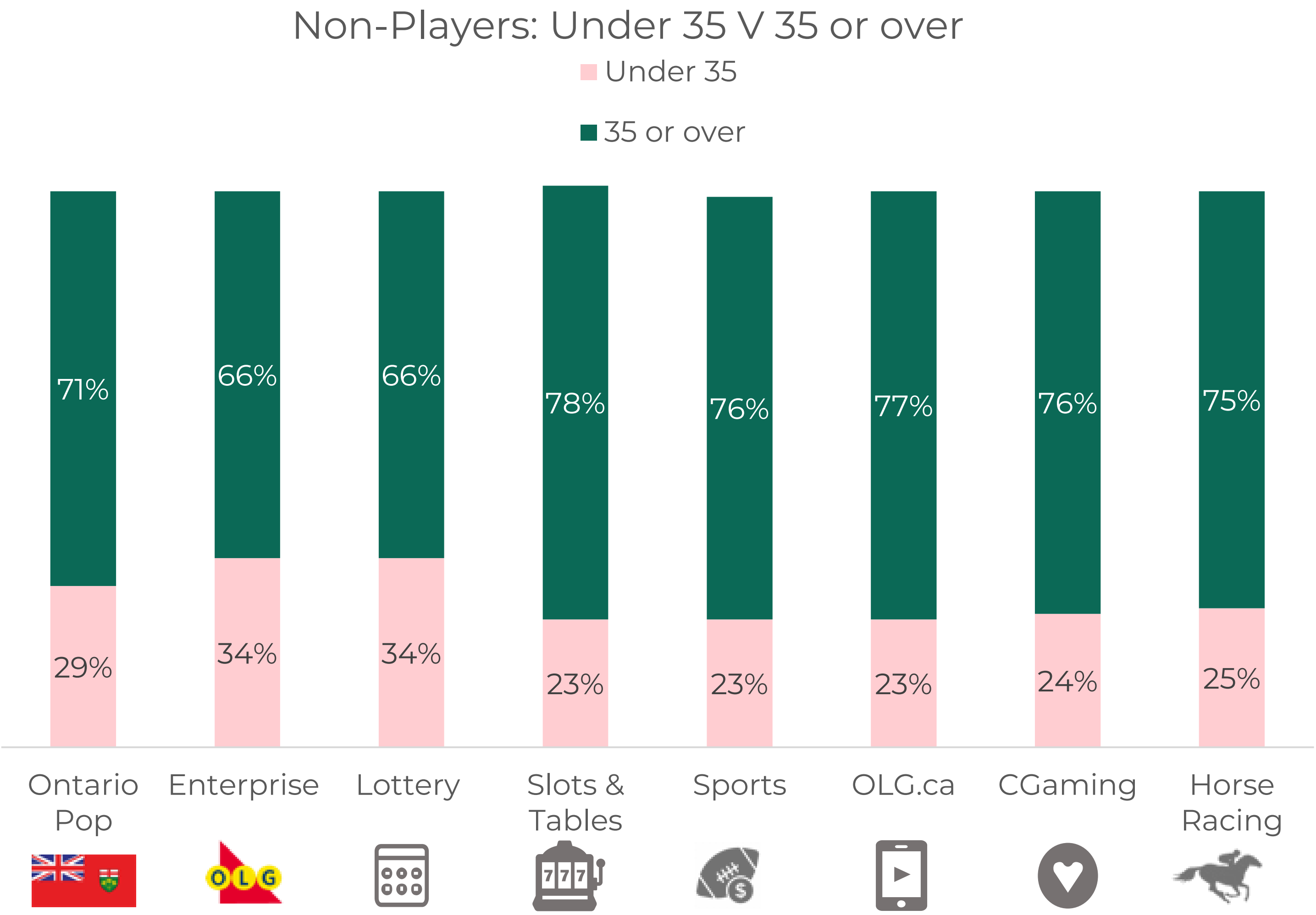
OLG is reliant on the O35 Market but still captures some U35 Players.

When analyzing the under 35 versus 35 or older segments, it becomes evident that OLG's business's is dependent on the 35 and over demographic. However, while Lottery unsurprisingly appears to be predominantly reliant on the O35 group, other LOBs, notably CGaming, Horse Racing and Sports exhibit a comparatively lesser dependence on the O35 market.

Although it will be important to understand the younger consumer generally, we now see the importance to uncover learnings around the U35 Player and U35 Non-Player.

Base: All Respondent (n= 5,161)
A1 - When was the last time you participated in each of the following activities?

Non-Player Profile U35 vs O35



U35, isn't the only opportunity for acquisition.

We can see that in comparison to the previous Player Profiles, overall OLG enterprise and Lottery has higher rates of non-player who are U35. However, they are not the only opportunity for acquisition. This doesn't suggest that a U35 focus is not important but rather the importance to consider a holistic approach to acquisition generally. To this end, perhaps there are other aspects to consider outside of age as to why potential players are not currently participating with OLG.

Base: All Respondent (n= 5,161)
A1 - When was the last time you participated in each of the following activities?

GET GROW KEEP SUMMARY

GET: **3.1M Ontarians** do not play today and 94% are not considering an OLG product in the future. From an age POV, enterprise wide 66% of them are represented by those O35, and 34% U35. Lottery has the highest participation in comparison to any other LOB.

GROW: Growth can come in multiple forms (e.g. frequency or transaction value) regardless, the current base of players who are currently engaging and who are likely to continue playing equates to **7M players** (73% O35/ 27%U35).

KEEP: Although we have 9.2M players, 24% of them state they are not likely to continue player with OLG in the future. This equates to **2.2M players who are at risk of lapsing**. With nearly a third of them being U35.

PORTFOLIO MANAGEMENT: Enterprise wide or LOB? If enterprise wide, for ***"Get",*** the other LOB's may want to consider the efficiencies of cross play between lottery and their LOB. It would center the focus on the ***player experience / journey*** and reduce individualized tactics. Given, the lack of loyalty and costs of acquisition, OLG should focus on player **retention (Keep)**.

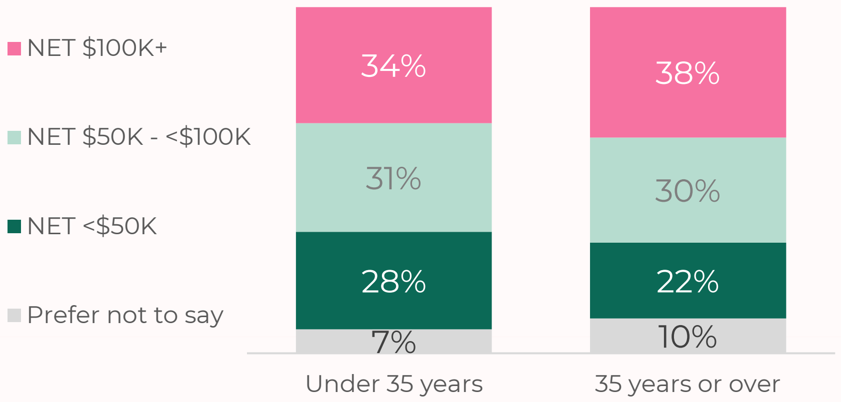
U35: From a current state POV, the focus of the U35 strategy should be grounded in ***purpose***. Given the fact that the U35 market only represents a third of the Ontario population, the revenue/market potential may be difficult for us to see benefits from our efforts (revenue). To this end, the purpose should be about ***relevancy*** and ***future proofing*** the business.

Demographic Profile-Total U35 vs O35

The O35 age group has a higher income (68% have $50K or more), smaller household size, are more likely to be married and slightly more likely to have some university or a graduate degree compared to the U35 group.

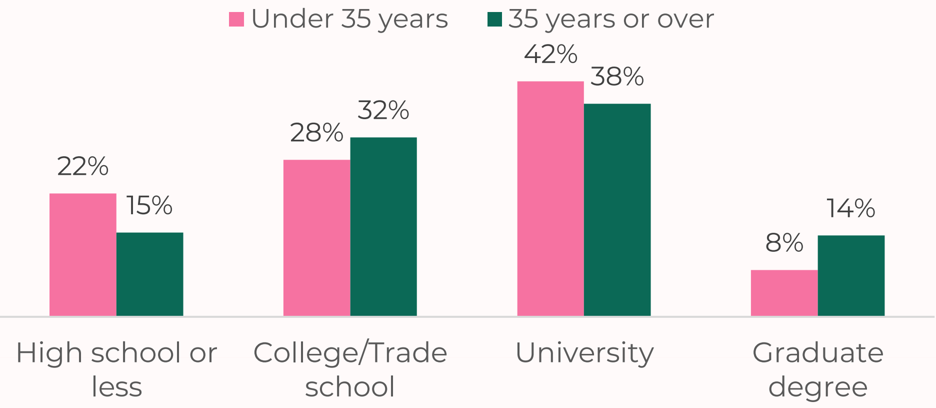
Total by Age

INCOME



45% / 55% Male/Female	Under 35 years
51% / 49% Male/Female	35 years or over

EDUCATION



People in Household

	Under 35 years	35 years or over
Live alone	**12%**	**22%**
Two people	**24%**	**40%**
Three people	**31%**	**18%**
Four people	**21%**	**14%**
Five or more	**12%**	**7%**

Kids in Household % Yes

37%	Under 35 years
24%	35 years or over

Marital Status

	Under 35 years	35 years or over
Married/ Common-law	**40%**	**65%**
Single, never married	**58%**	**20%**
Separated/ Divorced	**2%**	**11%**
Widowed	**0%**	**4%**

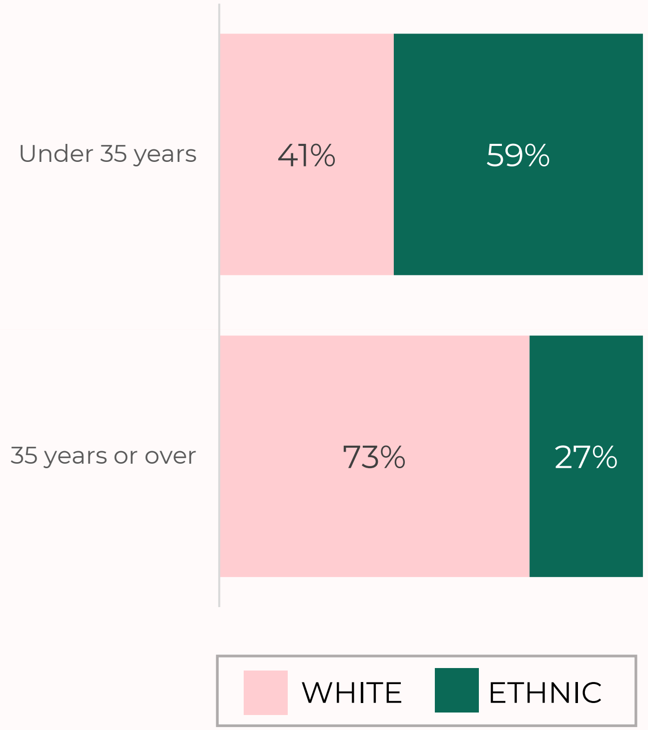
Base: All respondents (n=5,161)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile-Total U35 vs O35

The U35 cohort is more ethnically diverse with fewer identifying as white and a higher proportion identifying as Indigenous, South Asian or Black.

Total by Age

ETHNIC BACKGROUND



- White (41%)
- Indigenous (19%)
- South Asian (11%)
- Black (10%)
- Other (21%)

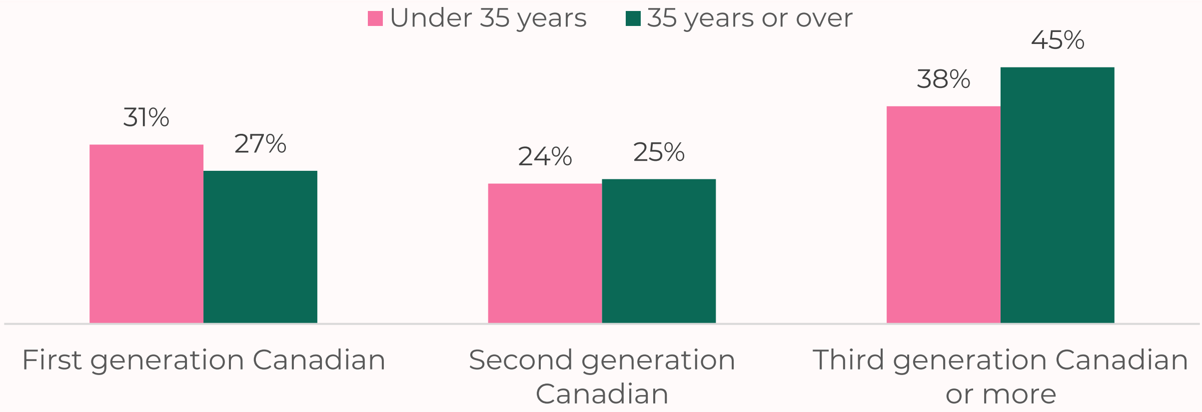
- White (73%)
- Chinese (7%)
- Indigenous (4%)
- South Asian (4%)
- Other (13%)

VISIBLE MINORITY % Yes

42%	Under 35 years
21%	35 years or over

Born in Canada % Yes

76%	Under 35 years
76%	35 years or over



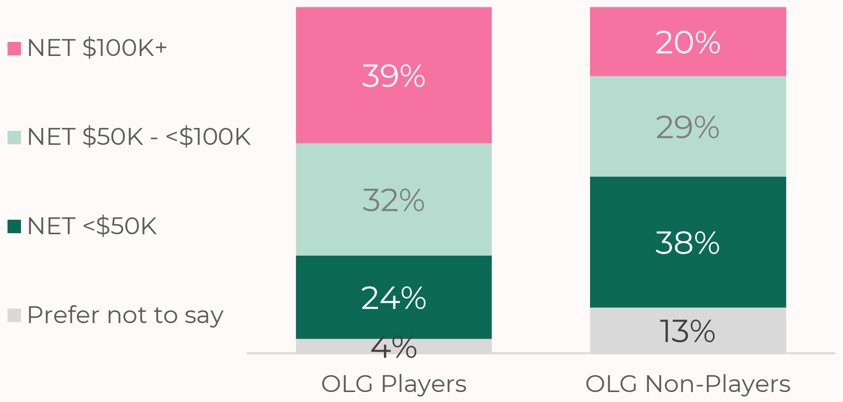
Base: All respondents (n=5,161)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

Demographic Profile - U35 Player vs Non-Players

Among U35, players and non-players differ in their demographic profile with players reporting a higher income (71% earn $50K or more), higher education and more likely to be married versus non-players in the U35 cohort.

OLG Players v. Non-Players : Under 35 years

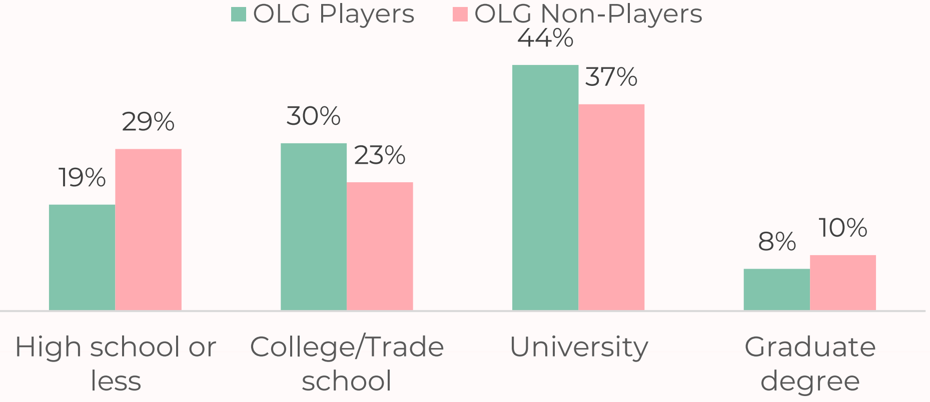
INCOME



50% / 50%
Male/Female
OLG Players

32% / 68%
Male/Female
OLG Non-Players

EDUCATION



People in Household

	OLG Players	OLG Non-Players
Live alone	11%	13%
Two people	23%	24%
Three people	34%	24%
Four people	21%	21%
Five or more	10%	18%

Kids in Household
% Yes

40%	OLG Players
31%	OLG Non-Players

Marital Status

	OLG Players	OLG Non-Players
Married/ Common-law	44%	29%
Single, never married	53%	70%
Separated/ Divorced	2%	1%
Widowed	0%	0%

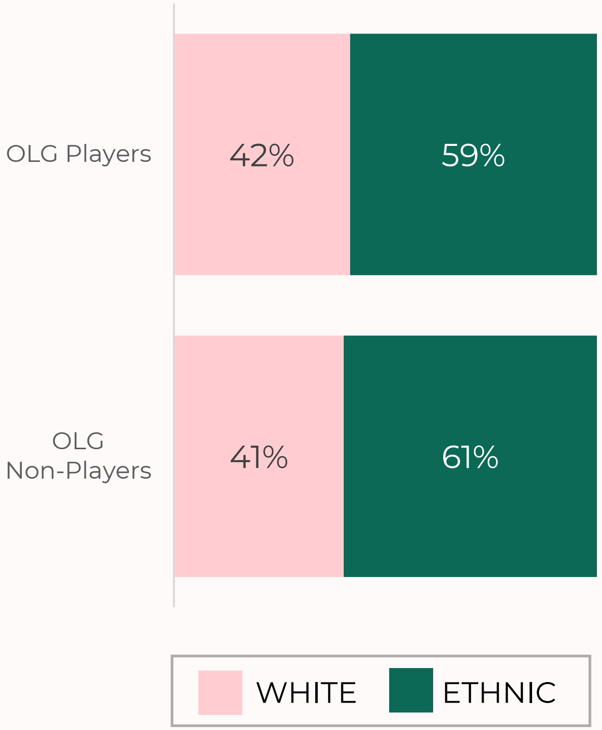
Base: Under 35 years - OLG Players (n=1,050), OLG Non-Players (n=447)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile - U35 Player vs Non-Players

When it comes to ethnic diversity or visible minority status, U35 players and non-players are very similar except for birth country where a vast majority of the U35 players (82%) are born in Canada (versus 63% for U35 non-players).

OLG Players v. Non-Players : Under 35 years

ETHNIC BACKGROUND



- White (42%)
- Indigenous (24%)
- South Asian (9%)
- Black (9%)
- Other (18%)

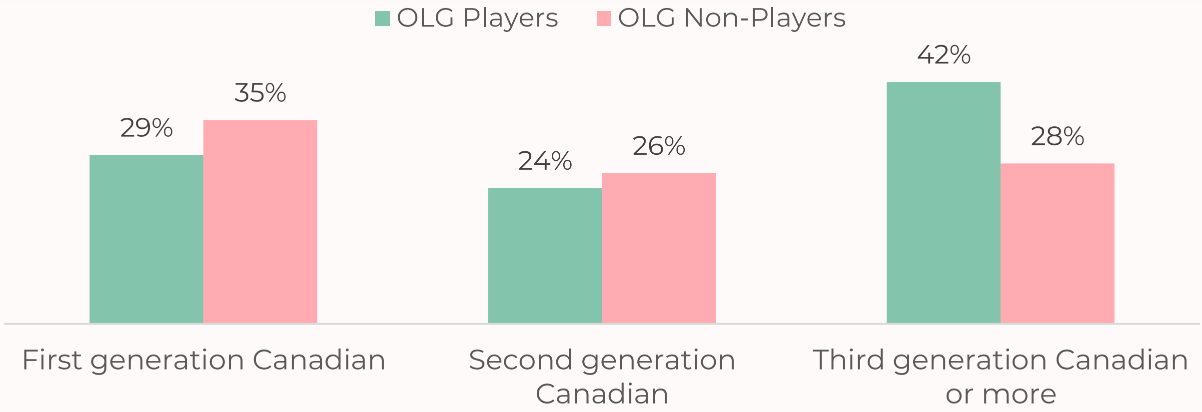
- White (41%)
- South Asian (16%)
- Black (14%)
- Chinese (8%)
- Indigenous (7%)
- Other (19%)

VISIBLE MINORITY % Yes

42%	OLG Players
43%	OLG Non-Players

Born in Canada % Yes

82%	OLG Players
63%	OLG Non-Players



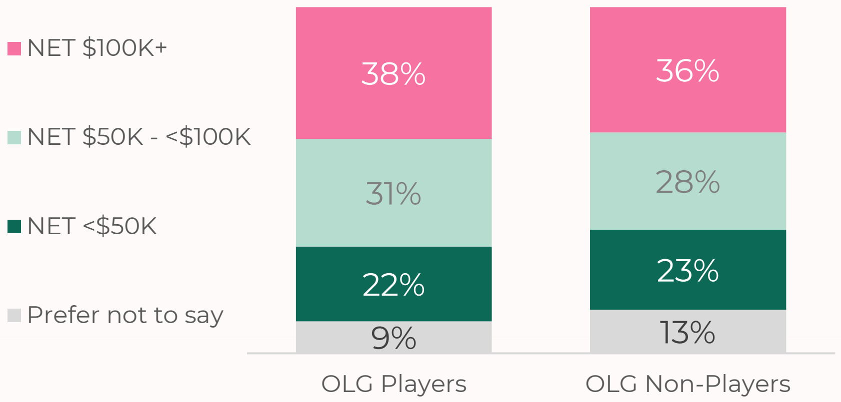
Base: Under 35 years - OLG Players (n=1,050), OLG Non-Players (n=447)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

Demographic Profile - O35 Player vs Non-Players

Contrary to the younger age group, the O35 cohort shows an almost identical demographic profile across players and non-players with the exception of education where non-players are more likely to have some university or graduate degree.

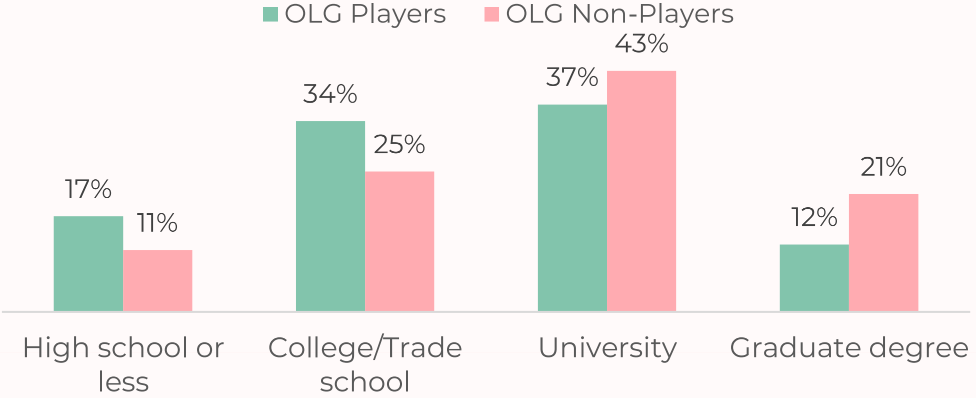
OLG Players v. Non-Players : 35 years or over

INCOME



51% / 49% Male/Female	OLG Players
50% / 50% Male/Female	OLG Non-Players

EDUCATION



People in Household

	OLG Players	OLG Non-Players
Live alone	20%	27%
Two people	42%	37%
Three people	19%	15%
Four people	13%	15%
Five or more	6%	7%

Kids in Household % Yes

24%	OLG Players
23%	OLG Non-Players

Marital Status

	OLG Players	OLG Non-Players
Married/ Common-law	66%	62%
Single, never married	18%	25%
Separated/ Divorced	12%	9%
Widowed	4%	4%

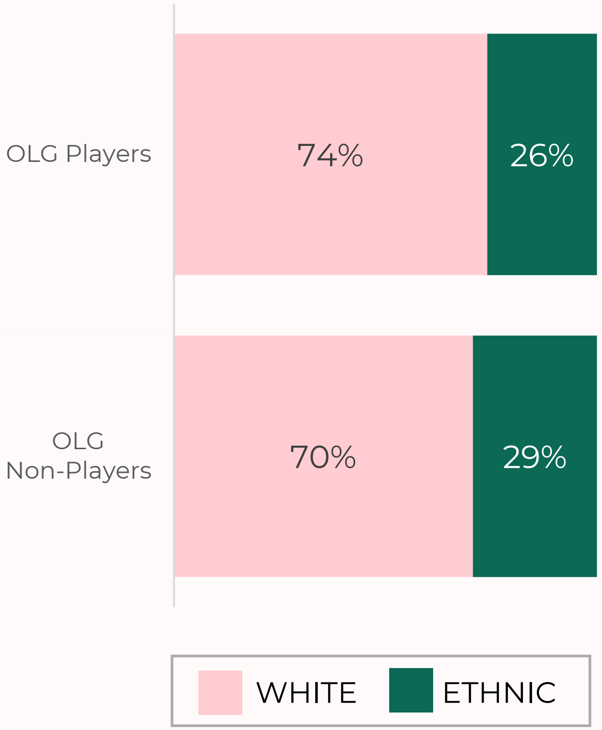
Base: 35 years or over - OLG Players (n=2,800), OLG Non-Players (n=864)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile - O35 Player vs Non-Players

Among the O35 age group, a higher proportion of non-players feel they belong to a visible minority or have an ethnically diverse background.

OLG Players v. Non-Players : 35 years or over

ETHNIC BACKGROUND



- White (74%)
- Chinese (6%)
- Indigenous (4%)
- South Asian (4%)
- Other (13%)

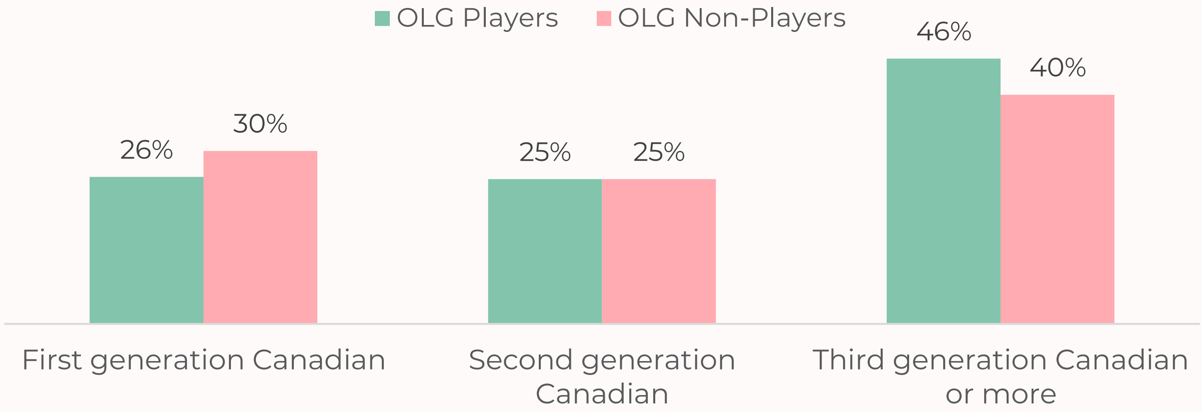
- White (70%)
- Chinese (12%)
- Black (4%)
- South Asian (4%)
- Other (10%)

VISIBLE MINORITY % Yes

20%	OLG Players
24%	OLG Non-Players

Born in Canada % Yes

77%	OLG Players
71%	OLG Non-Players



Base: 35 years or over - OLG Players (n=2,800), OLG Non-Players (n=864)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

Player vs. Non-Player SUMMARY

U35 vs. O35: Overall, U35 Ontarians are more diverse than their O35 counterparts almost doubling when it comes to **ethnic background** and **visible minority** aspects.

U35 Players vs Non-Players: U35 non players are more likely than U35 Players to be female, have a lower income, and less likely to be married. Which may suggest U35 players are more advanced life stage wise (traditional). However, non-players more likely to be **born outside of Canada** than then players in the same age cohort.

O35 Players vs. Non-Players : Contrary to the U35, the O35 Players and Non-Players have similar demographic profiles except for the important aspect of diversity. O35 Non-Players are more likely to have an **ethnic background**, identify as a **visible minority** and be **born outside of Canada**.

MULTICULTURAL STRATEGY: When considering U34 vs. O35 and Players vs. Non-players, one overarching theme is clear, multiculturalism. Non-engaging players tend to represent greater ethnic diversity than the general population, primarily influenced by the less diverse nature of the Lottery category. Cultural relevance, especially in Lottery acquisition, is crucial. However, before pursuing multicultural tactics, establishing a cultural connection with existing players may be the most nurturing/intentional route. In term of ethnicities of focus: Indigenous, South Asian, Black & Chinese are mentioned most often. Unity would recommend cultural studies to begin the community connections.

VALUES & PROFILE

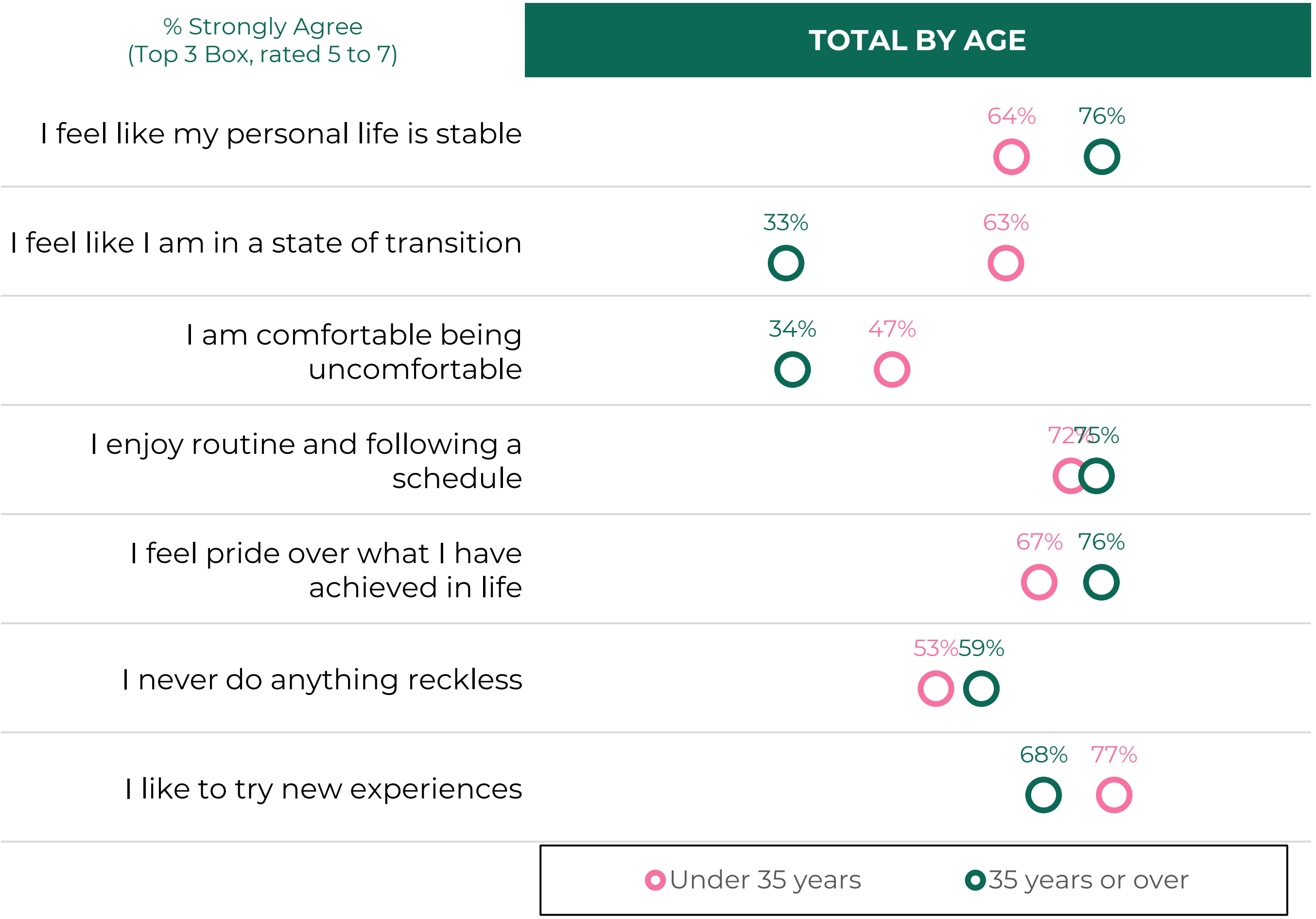
This section identifies the values, attitudes, and other characteristics of each age sub-group, highlighting differences between the player and non-player segment

UNITY INSIGHTS

Self Perception

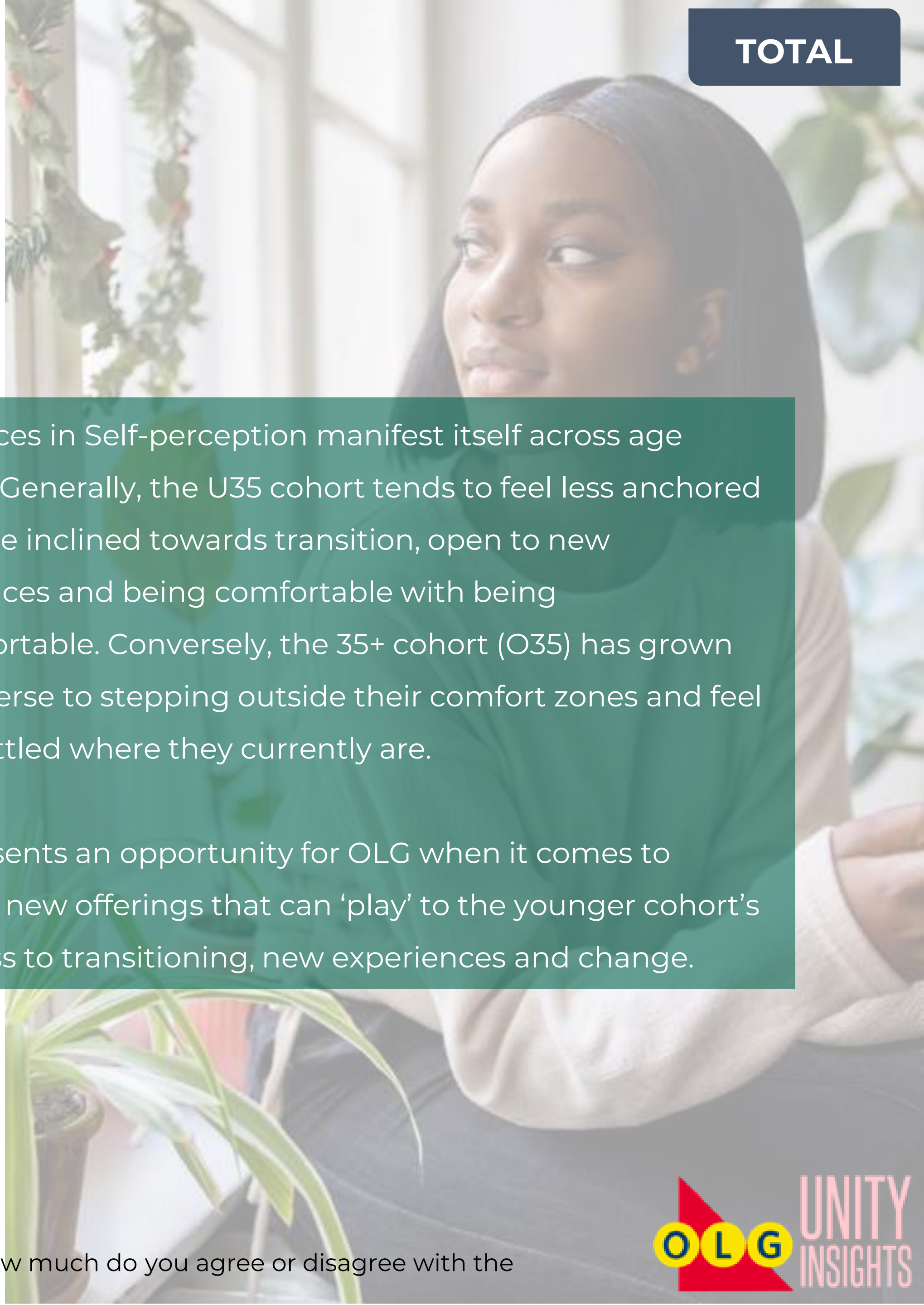
TOTAL

Differences in Self-Perception: Under 35's are embracing Transition and New Experiences



Differences in Self-perception manifest itself across age cohorts. Generally, the U35 cohort tends to feel less anchored and more inclined towards transition, open to new experiences and being comfortable with being uncomfortable. Conversely, the 35+ cohort (O35) has grown more averse to stepping outside their comfort zones and feel more settled where they currently are.

This presents an opportunity for OLG when it comes to ideating new offerings that can 'play' to the younger cohort's openness to transitioning, new experiences and change.

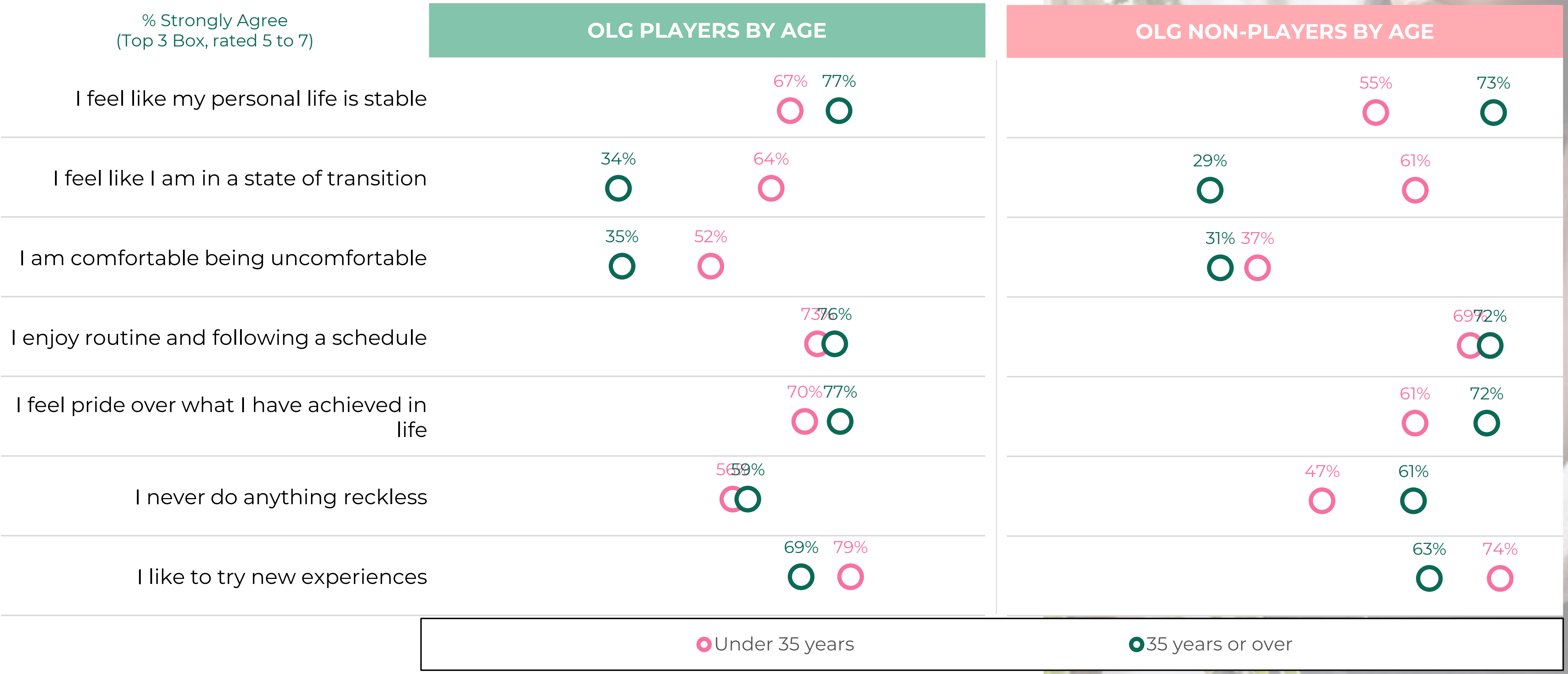


Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Self Perception

OLG PLAYERS V. NON-PLAYERS

Overall, U35 and O35 players view themselves very similarly on most aspects of self-perception. However, when comparing the U35 players and non-players, differences are evident: U35 non-players feel less stable, less accepting of being uncomfortable, less proud of life accomplishments and less open to new experiences. These are considerations OLG needs to pay attention to when it comes to product innovation, relevance and communication for the younger non-player audience.

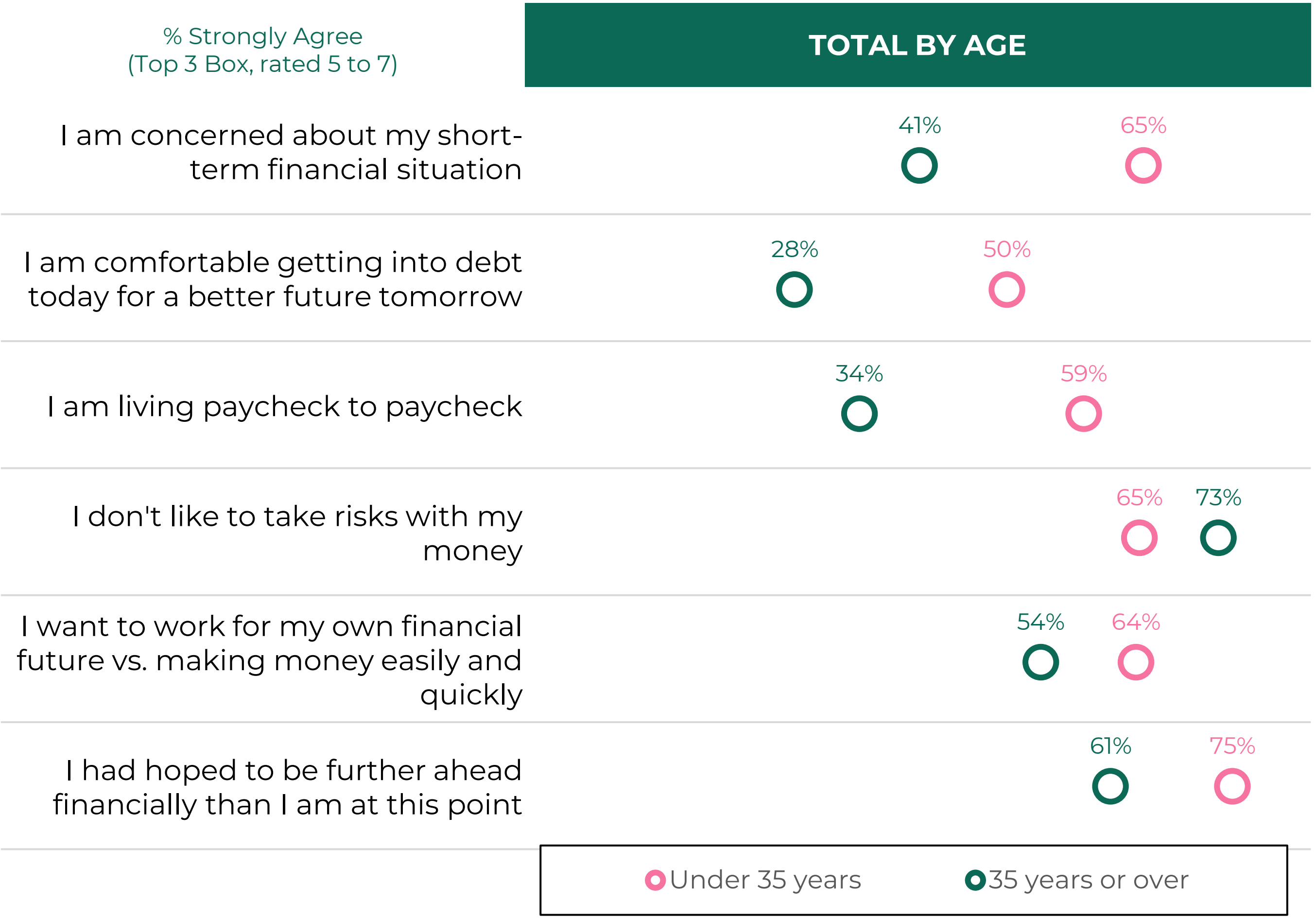


Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Financial Outlook

TOTAL

U35's Financial Paradox: Aspiring for Prosperity with Caution and a Willingness to Invest in the Future



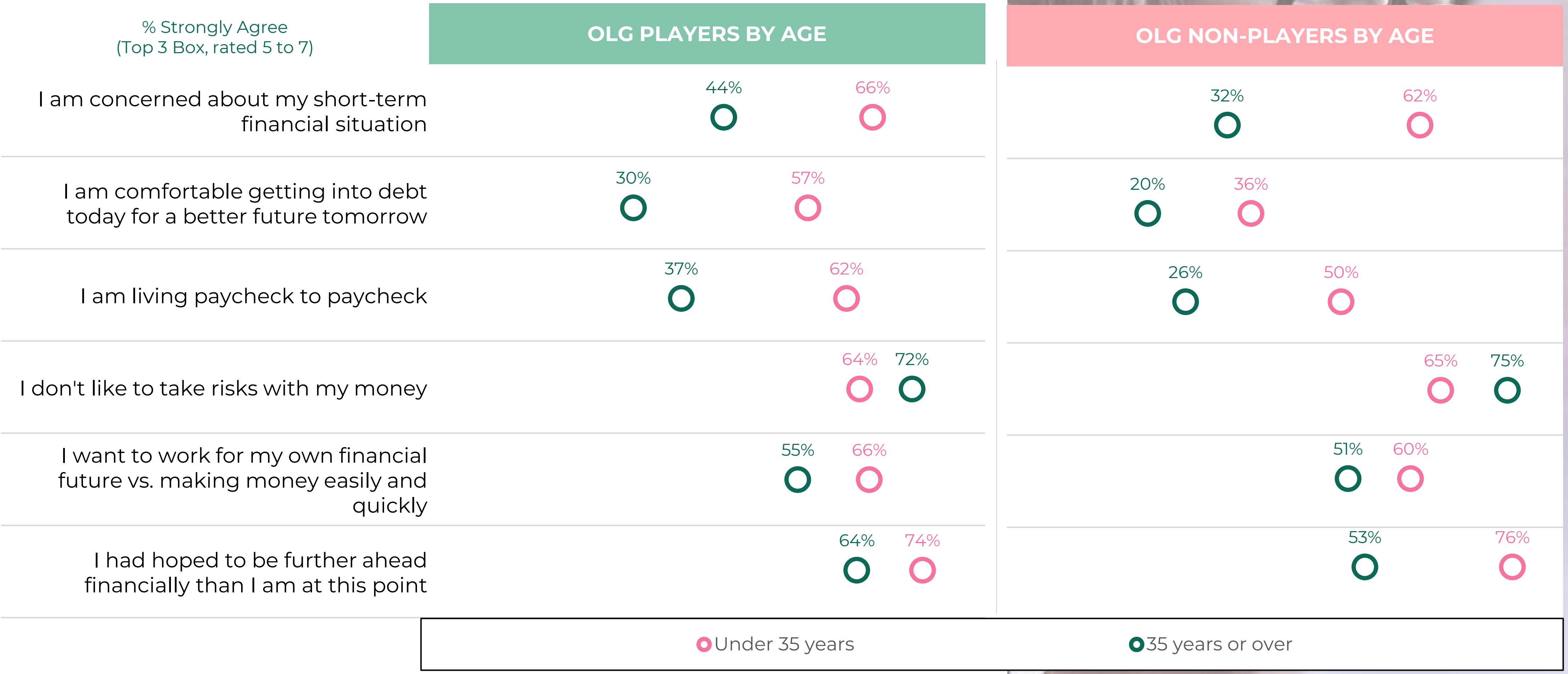
Differences in financial outlook are evident across age groups. The U35 age group expresses more concerns about financial well-being and more hope to be financially further ahead than their O35 counterpart. Yet, the U35 age group is more resolute about the importance of hard work on this journey compare to O35 individuals. Interestingly, younger individuals tend to be more comfortable with taking on debt for long-term gains than older individuals.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Financial Outlook

OLG PLAYERS V. NON-PLAYERS

U35's aspiration for prosperity with caution and worrisome financial outlook is also evident for players and non-players, but differences are evident. U35 non-players are somewhat less worried about their financial situation, fewer live paycheck to paycheck, but also less comfortable to investing in the future through going into debt.

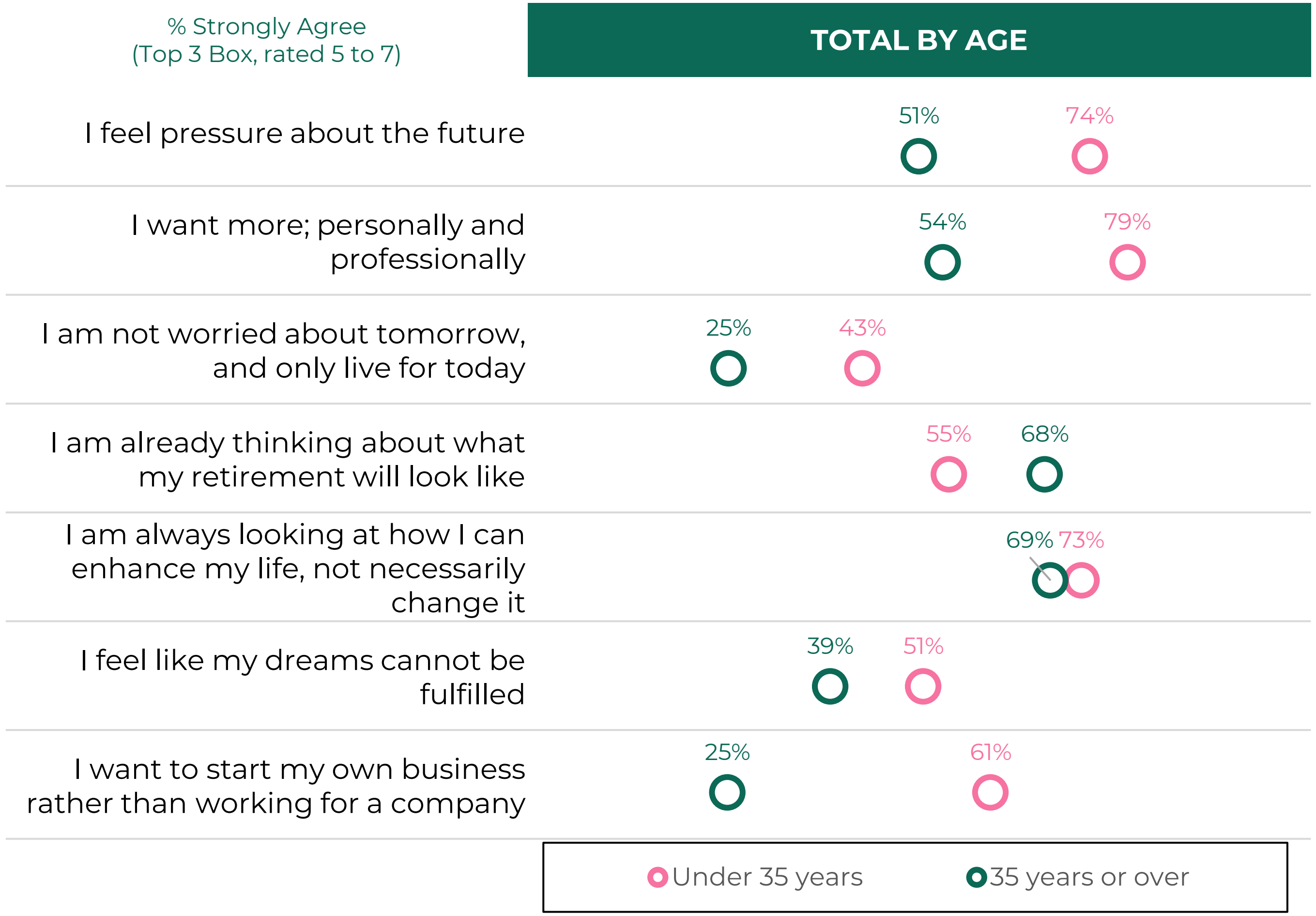


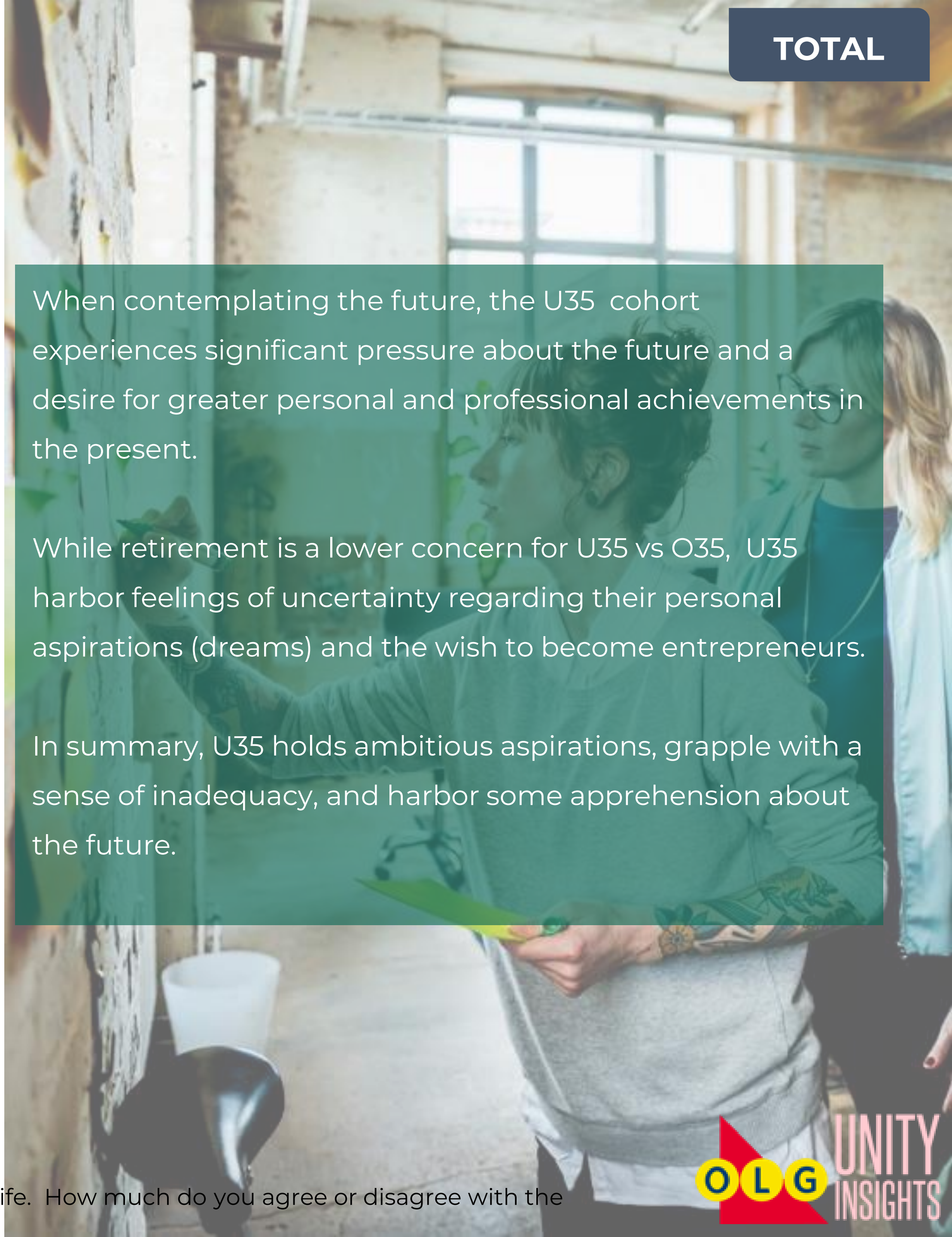
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Future Aspirations

TOTAL

U35 vs. O35: Contrasting Perspectives on the Future





When contemplating the future, the U35 cohort experiences significant pressure about the future and a desire for greater personal and professional achievements in the present.

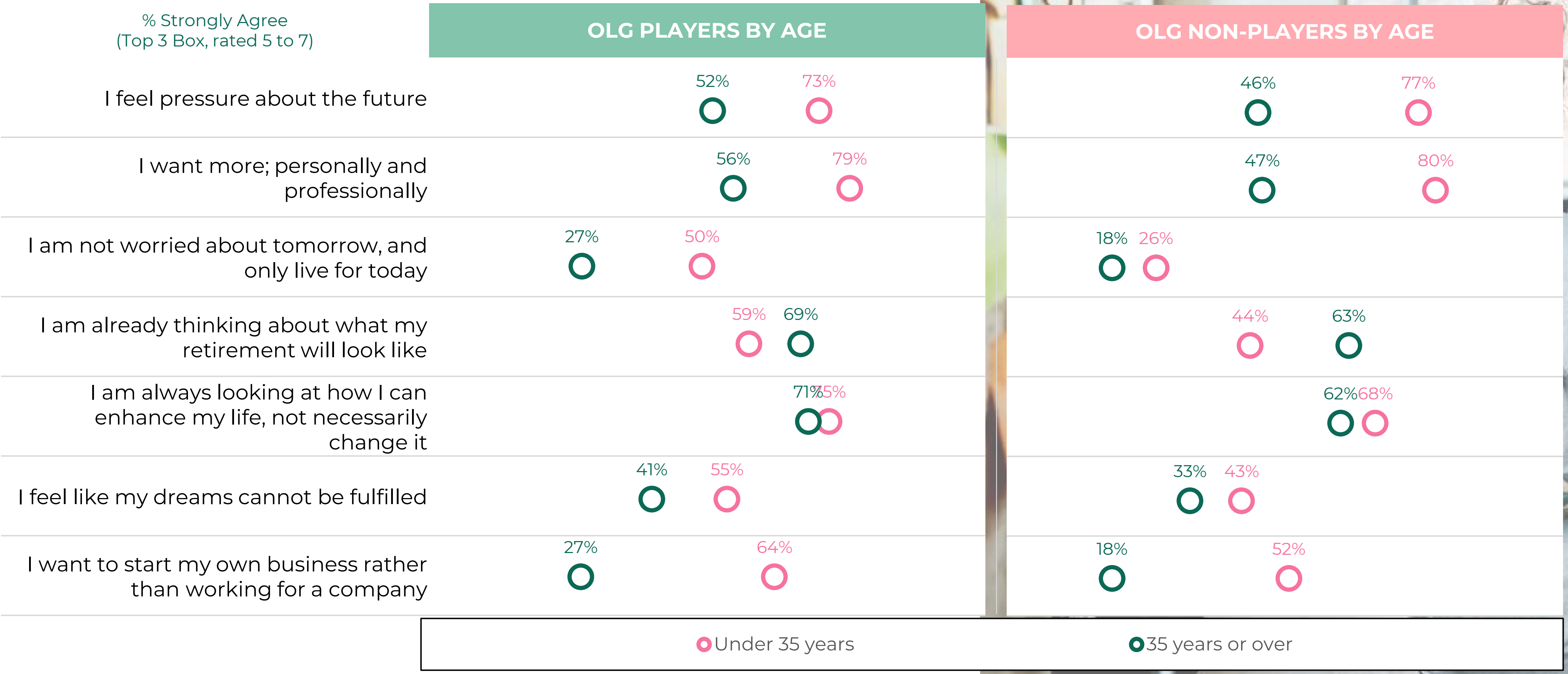
While retirement is a lower concern for U35 vs O35, U35 harbor feelings of uncertainty regarding their personal aspirations (dreams) and the wish to become entrepreneurs.

In summary, U35 holds ambitious aspirations, grapple with a sense of inadequacy, and harbor some apprehension about the future.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Future Aspirations

Overall, future aspirations seem similar when comparing players and non-players by age cohorts. Notable differences exist in some areas, specifically, younger players are much more living for today (not worrying about the future) than younger non-players, yet they think more about retirement and looking for how to enhance their life than U35 non-players.



Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

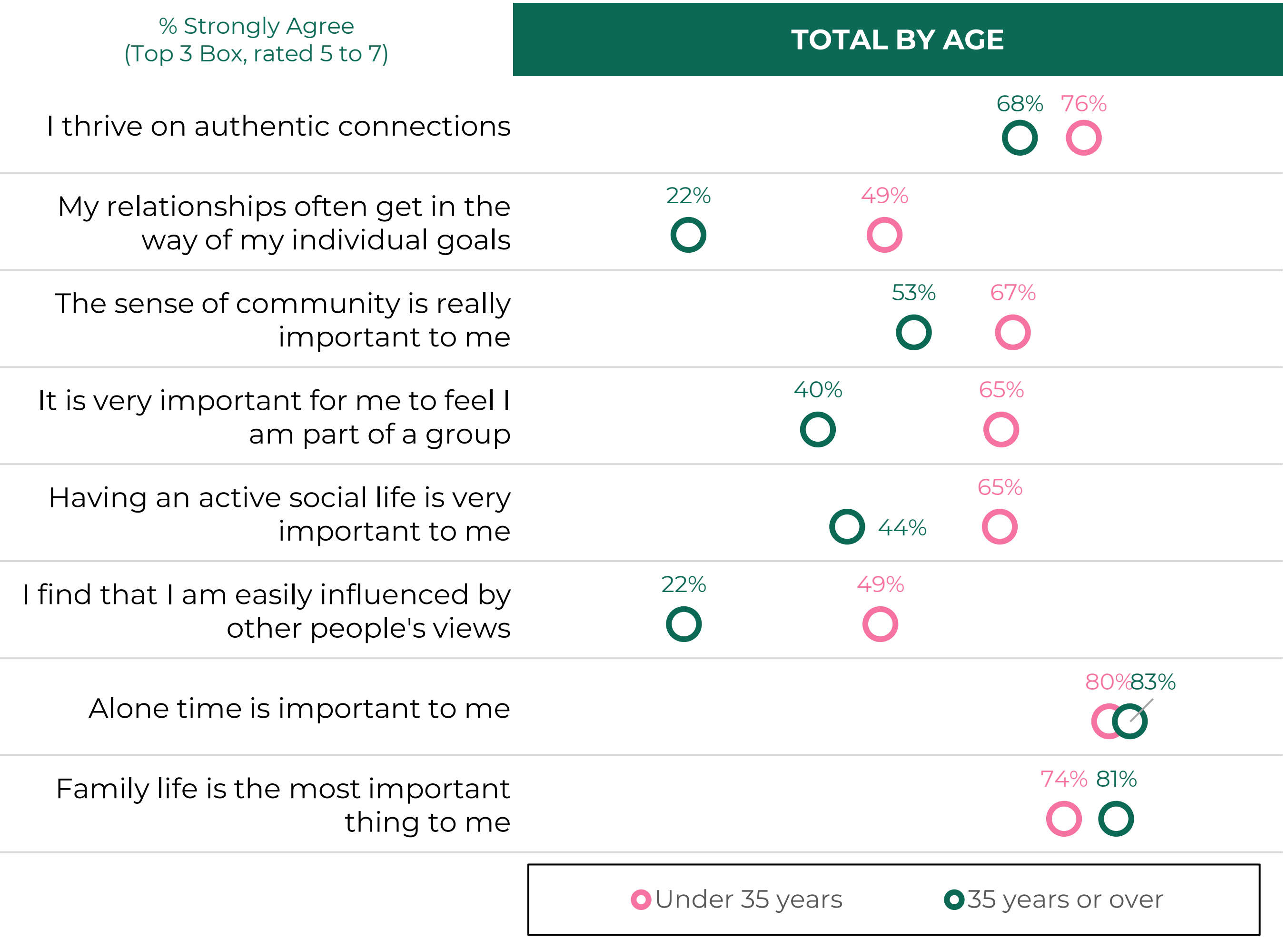
TOTAL

Connections & Community

Generational Value Shifts: The Interplay Between Family, Community, and Peer Influence

While O35 individuals tend to prioritize family slightly more, community holds significance for the younger cohort as well. Additionally, there appears to be a struggle among the younger age group, who strongly desire group affiliation to the extent that they are often easily swayed by peer influence, sometimes placing these relationships above individual aspirations.

In contrast, the older cohort seem more resilient to social influence and a steadfast commitment to their own needs

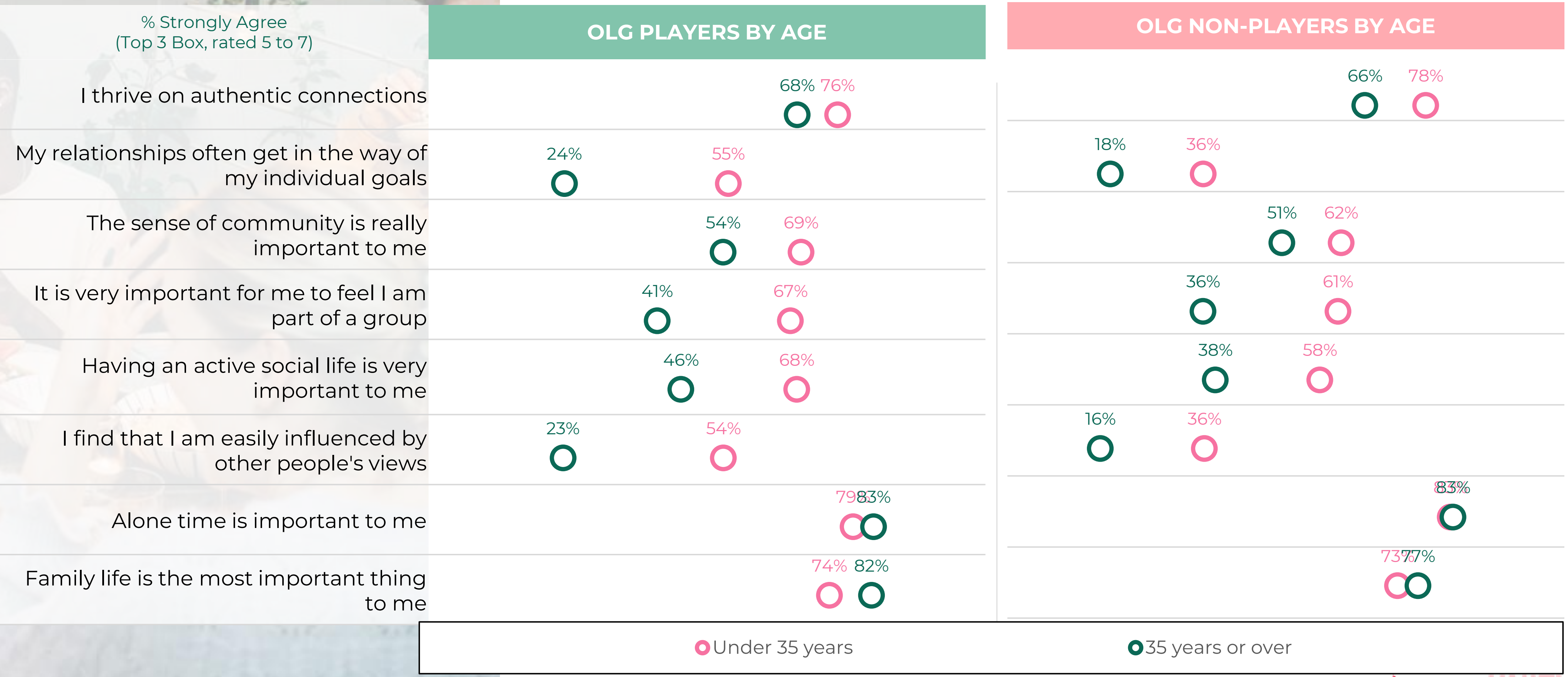


Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG PLAYERS V. NON-PLAYERS

Connections & Community

The importance of community and social relationships is evident for U35 players and non-players. Interestingly, younger non-players seem more independent and looking out for their own individual needs than the U35 players. OLG needs to consider these factors and building relevance based on community may not easily resonate with the younger non-player audience.



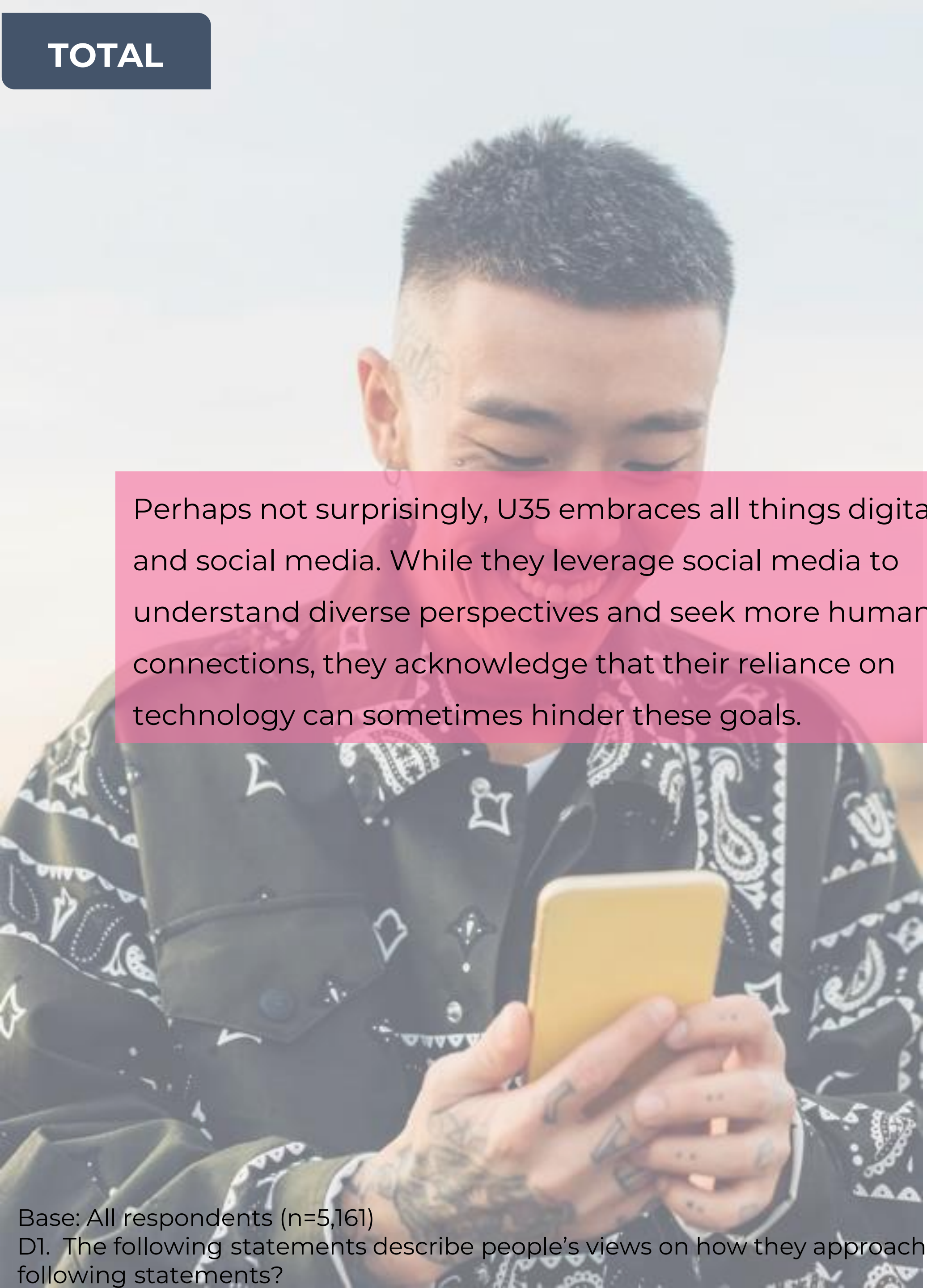
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG UNITY INSIGHTS

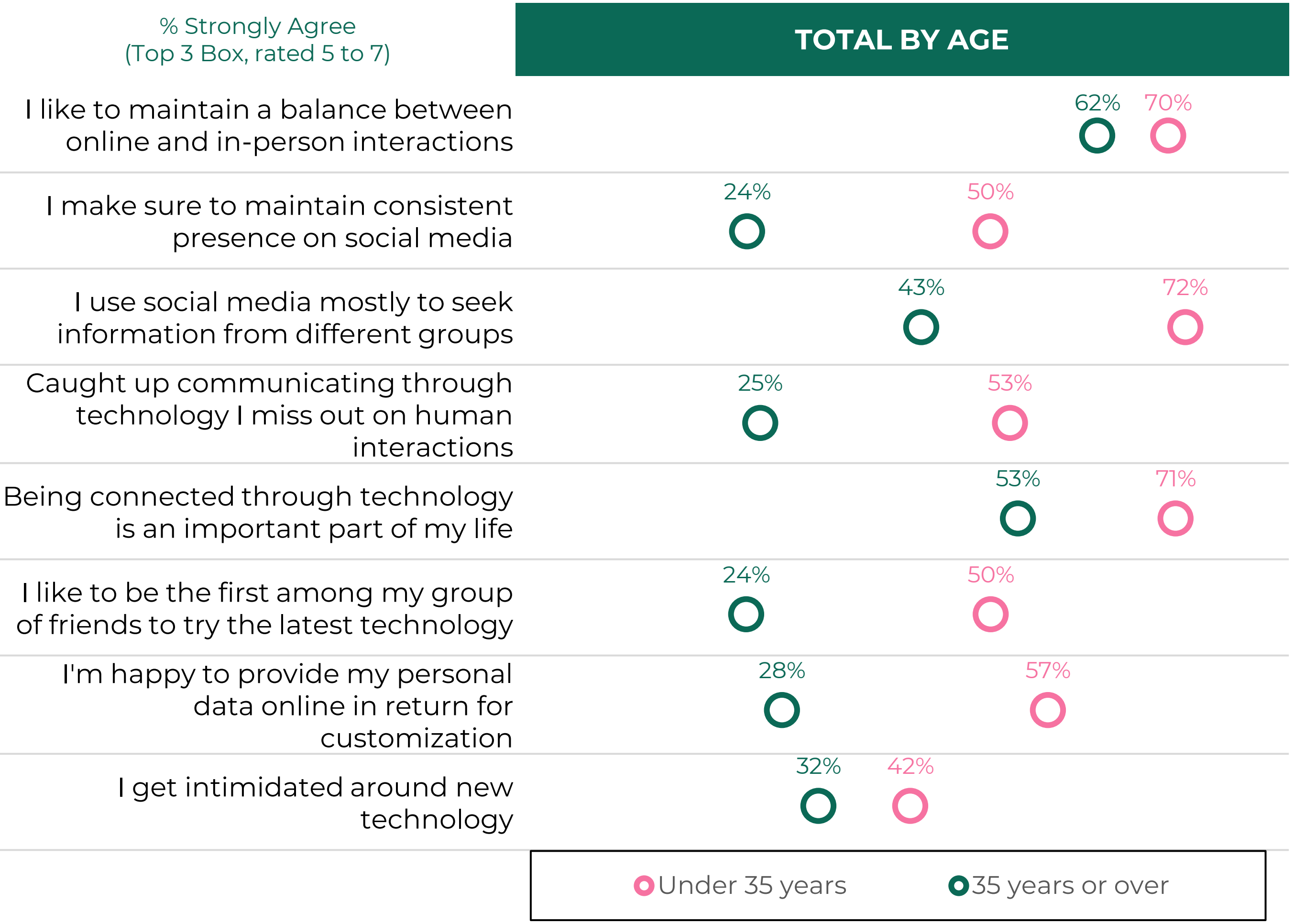
TOTAL

Technology & Social Media

U35: Embracing Digital Life, Balancing Connection and Dependency



Perhaps not surprisingly, U35 embraces all things digital and social media. While they leverage social media to understand diverse perspectives and seek more human connections, they acknowledge that their reliance on technology can sometimes hinder these goals.



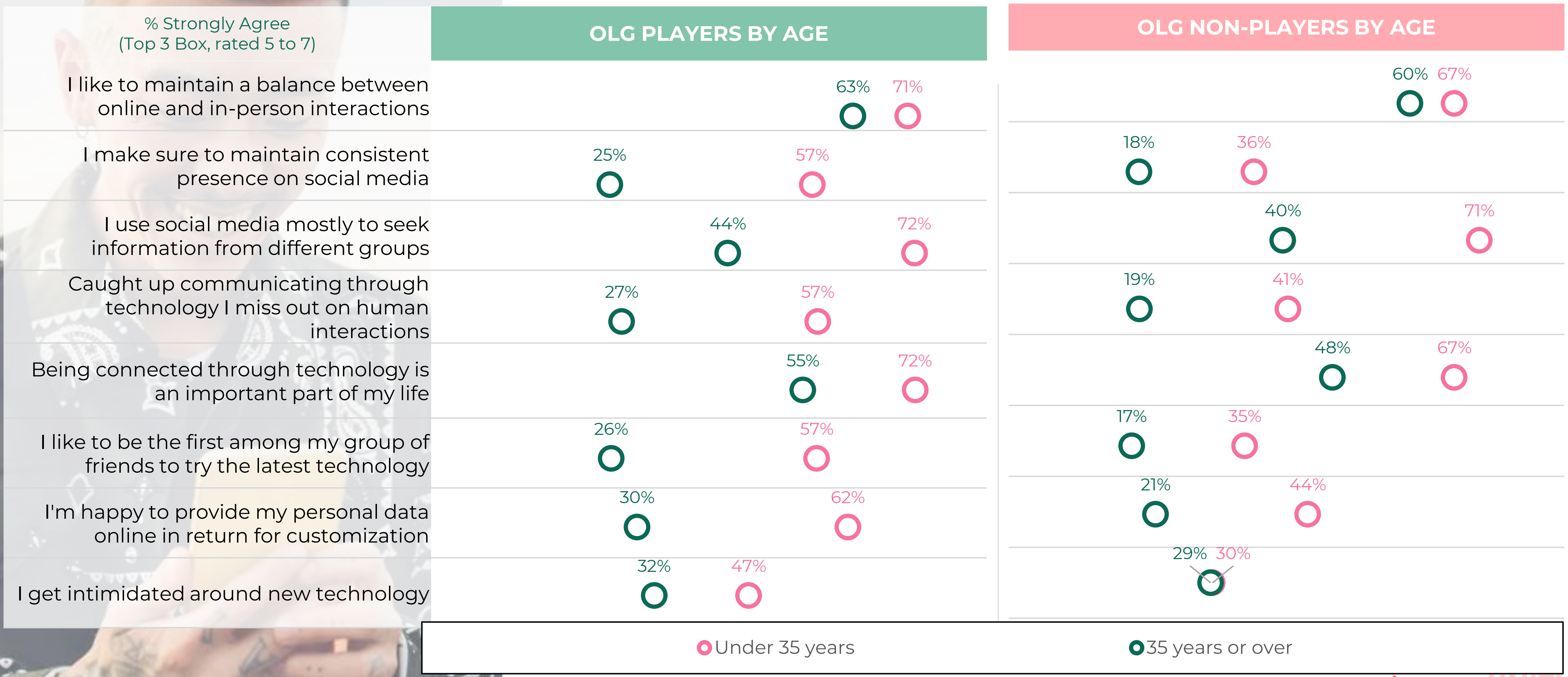
% Strongly Agree (Top 3 Box, rated 5 to 7)	○ Under 35 years	○ 35 years or over
I like to maintain a balance between online and in-person interactions	70%	62%
I make sure to maintain consistent presence on social media	50%	24%
I use social media mostly to seek information from different groups	72%	43%
Caught up communicating through technology I miss out on human interactions	53%	25%
Being connected through technology is an important part of my life	71%	53%
I like to be the first among my group of friends to try the latest technology	50%	24%
I'm happy to provide my personal data online in return for customization	57%	28%
I get intimidated around new technology	42%	32%

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG PLAYERS V. NON-PLAYERS

Technology & Social Media

U35 leads the digital charge across both players and non-players. However, when comparing U35 players and U35 non-players, we notice that non-players are less engaged with social media, less open to trying new technology and also more cautious in providing personal information online. This is relevant for OLG to consider when it comes to communication efforts and trying to connect with the U35 non-player group.

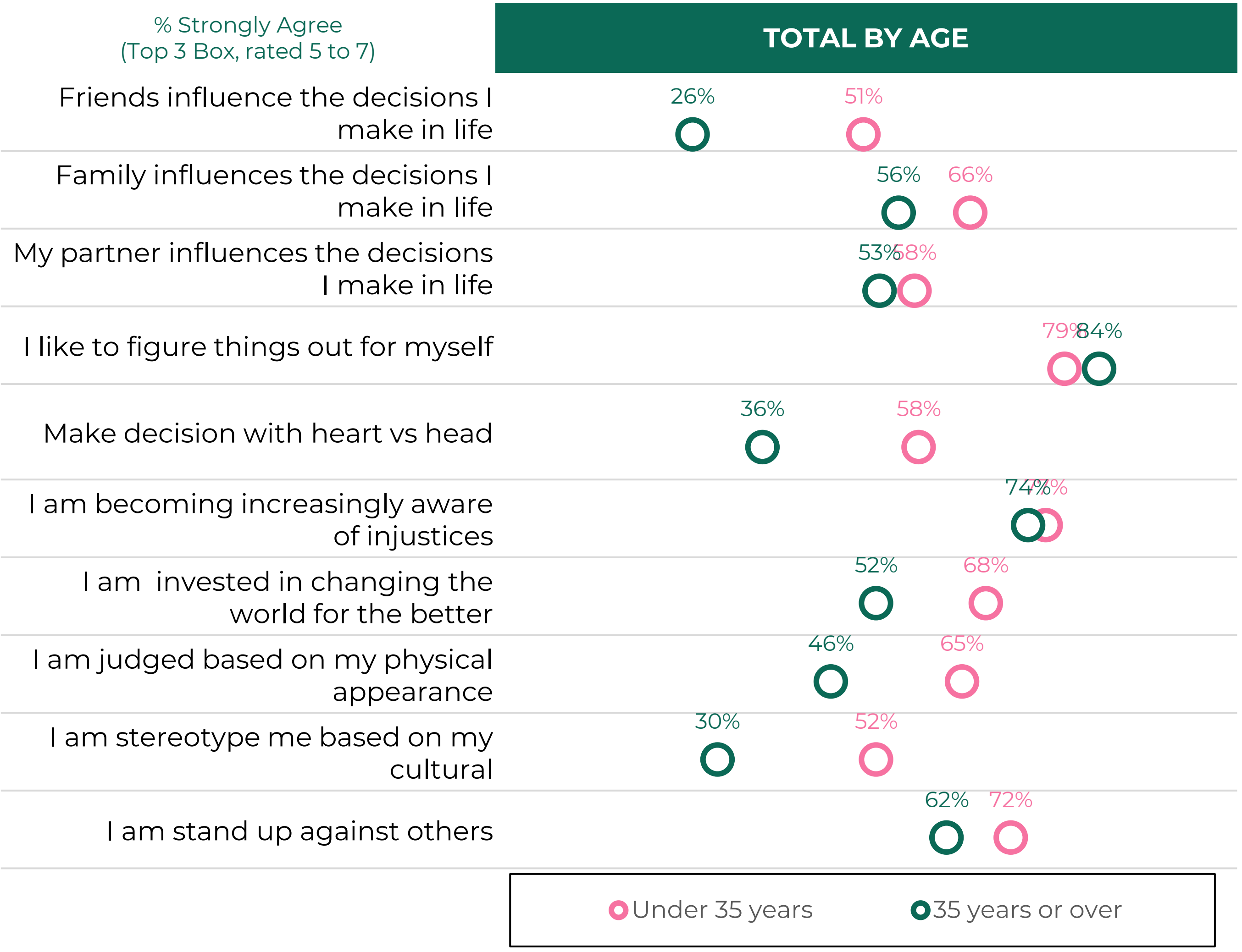


Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Social Issues & Decision Making

TOTAL

U35: Activism and Emotional Decision Making



While both age groups acknowledge an increasing awareness of social issues, it is evident that the younger cohorts are more actively engaged in efforts to effect change. This personal motivation is underscored by the fact that more U35 individuals feel they are judged based on their appearance and to experience stereotypes based on their culture. An important aspect to consider for OLG's approach to Multicultural.

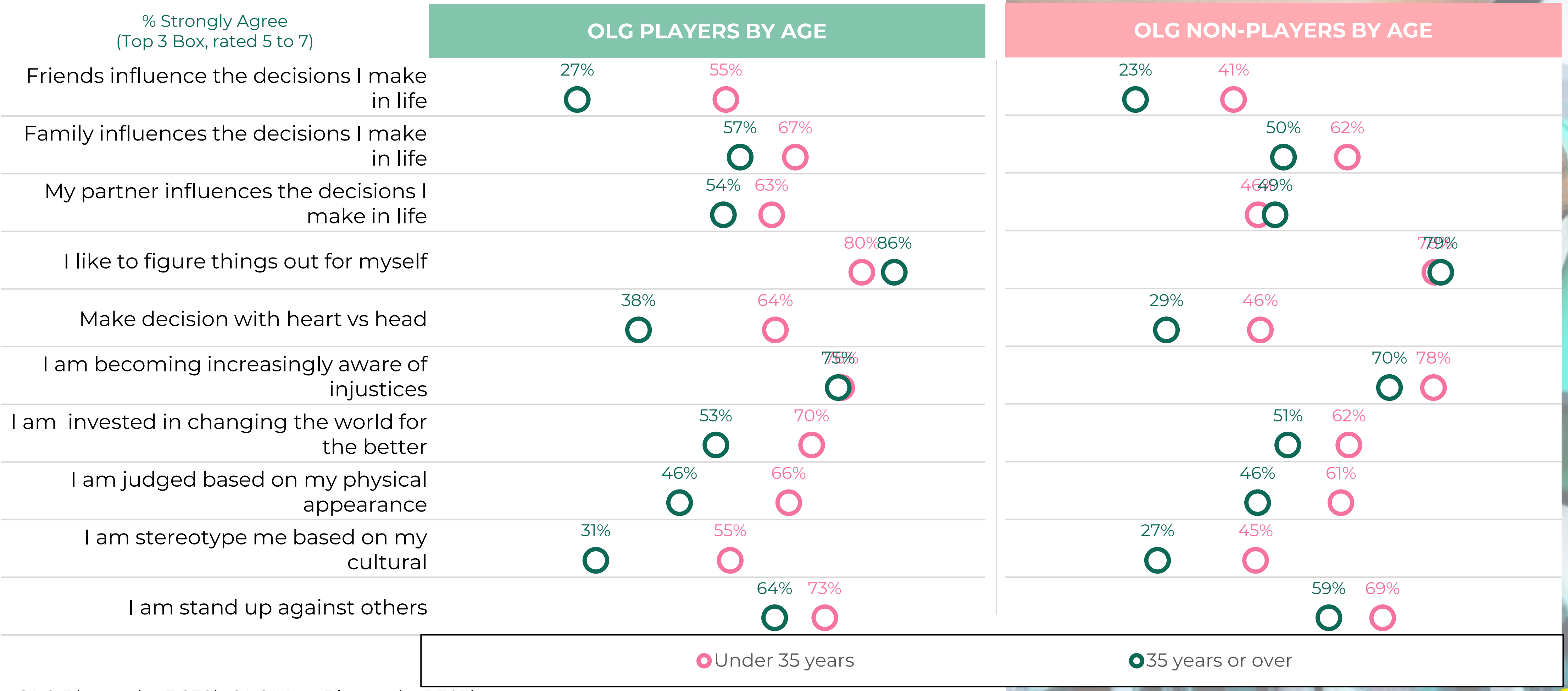
In terms of decision-making, U35 tends to be more driven by their emotions than their older counterparts. Moreover, the older demographic exhibits a lower reliance on friends and family for validation.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Social Issues & Decision Making

OLG PLAYERS V. NON-PLAYERS

Awareness of social injustices is widespread across both age groups, both for players and non-players. Yet, U35 non-players seem to be less vested in evoking change, standing up for others which may stem from the fact that they experience less stereotyping or judgement themselves compared to U35 players. Overall, non-players seem more autarch and rational (head vs heart) in their decision making than players.

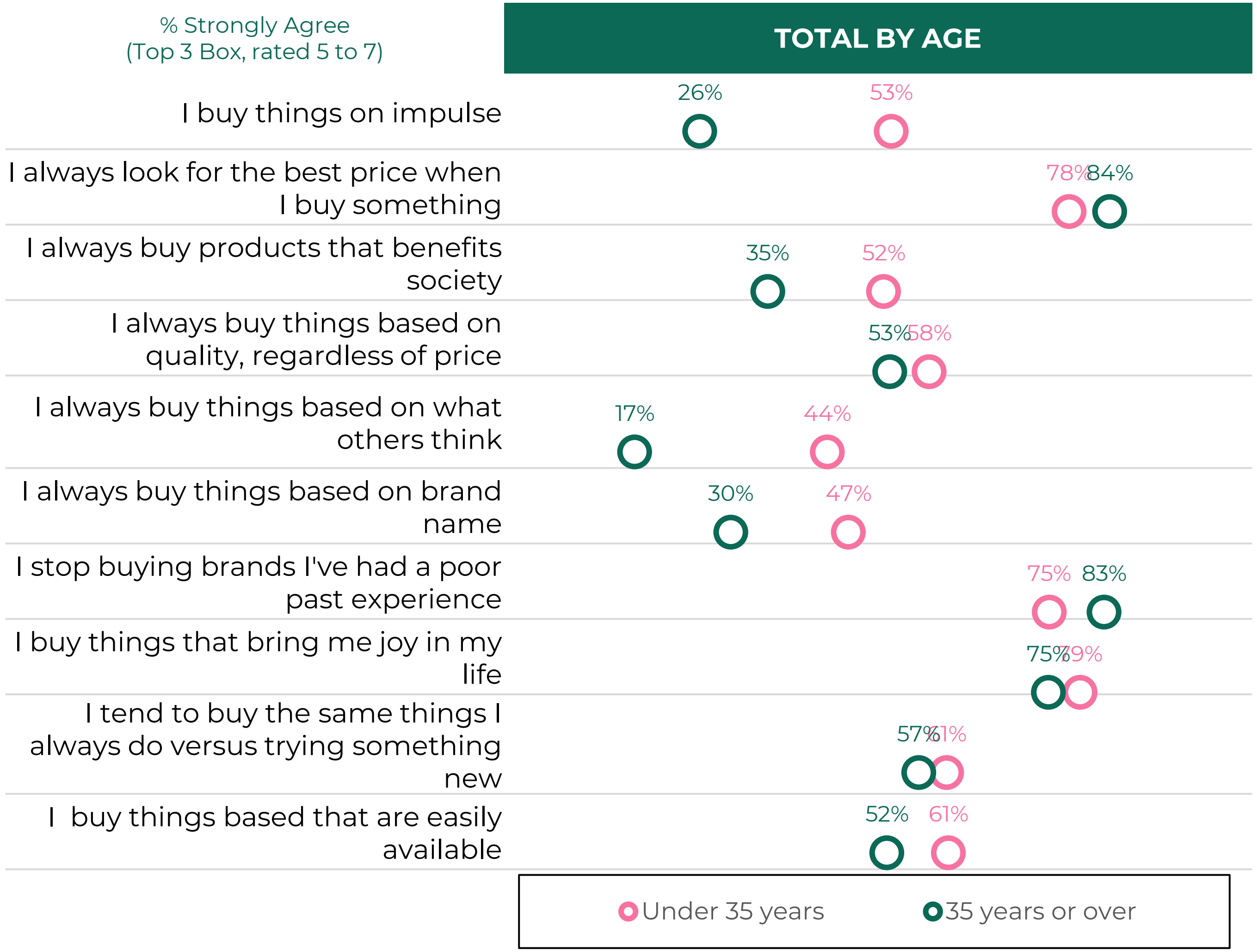


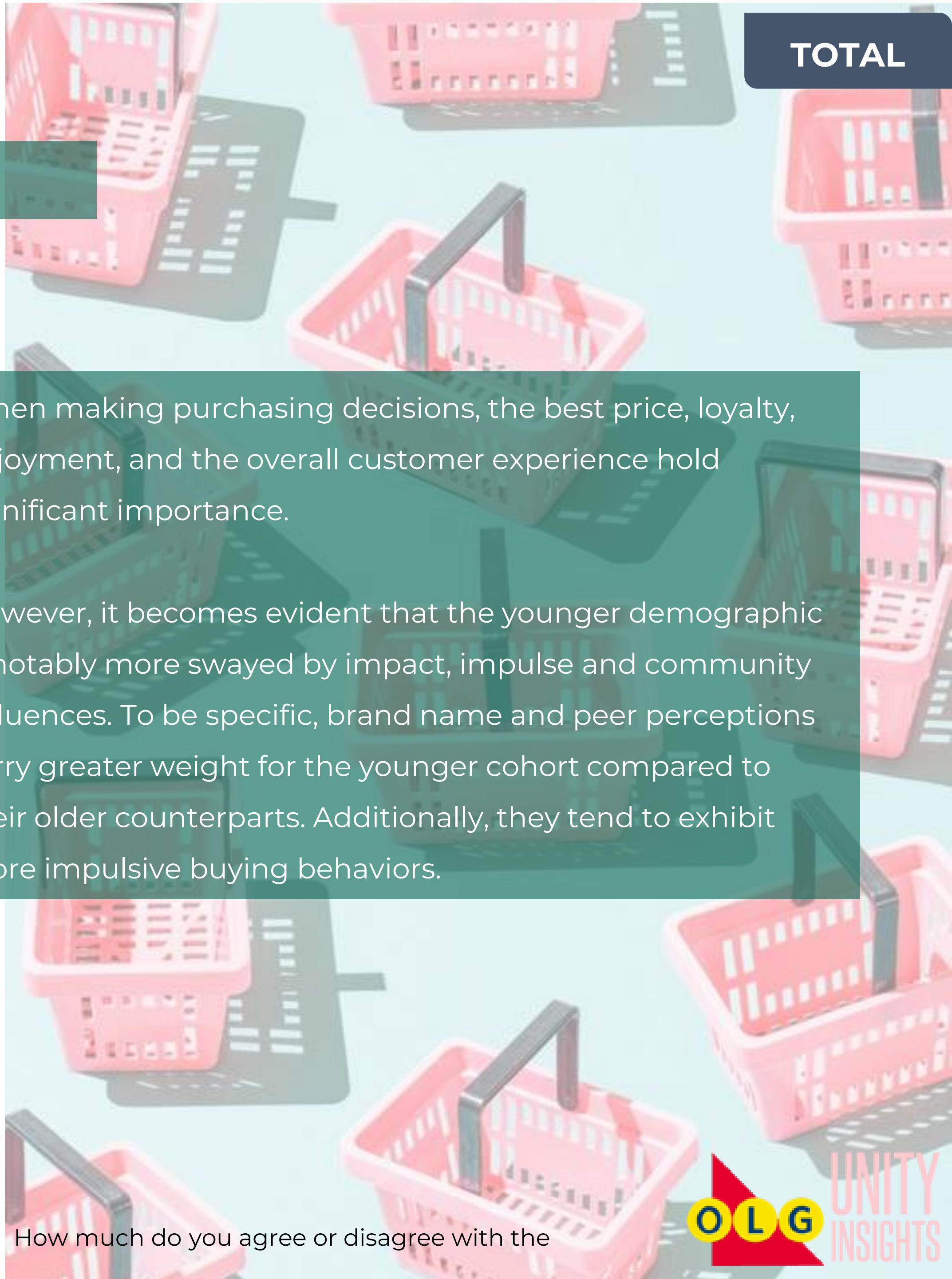
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Purchase Behaviour

TOTAL

A Balance of Common Ground and Cultural Influence





When making purchasing decisions, the best price, loyalty, enjoyment, and the overall customer experience hold significant importance.

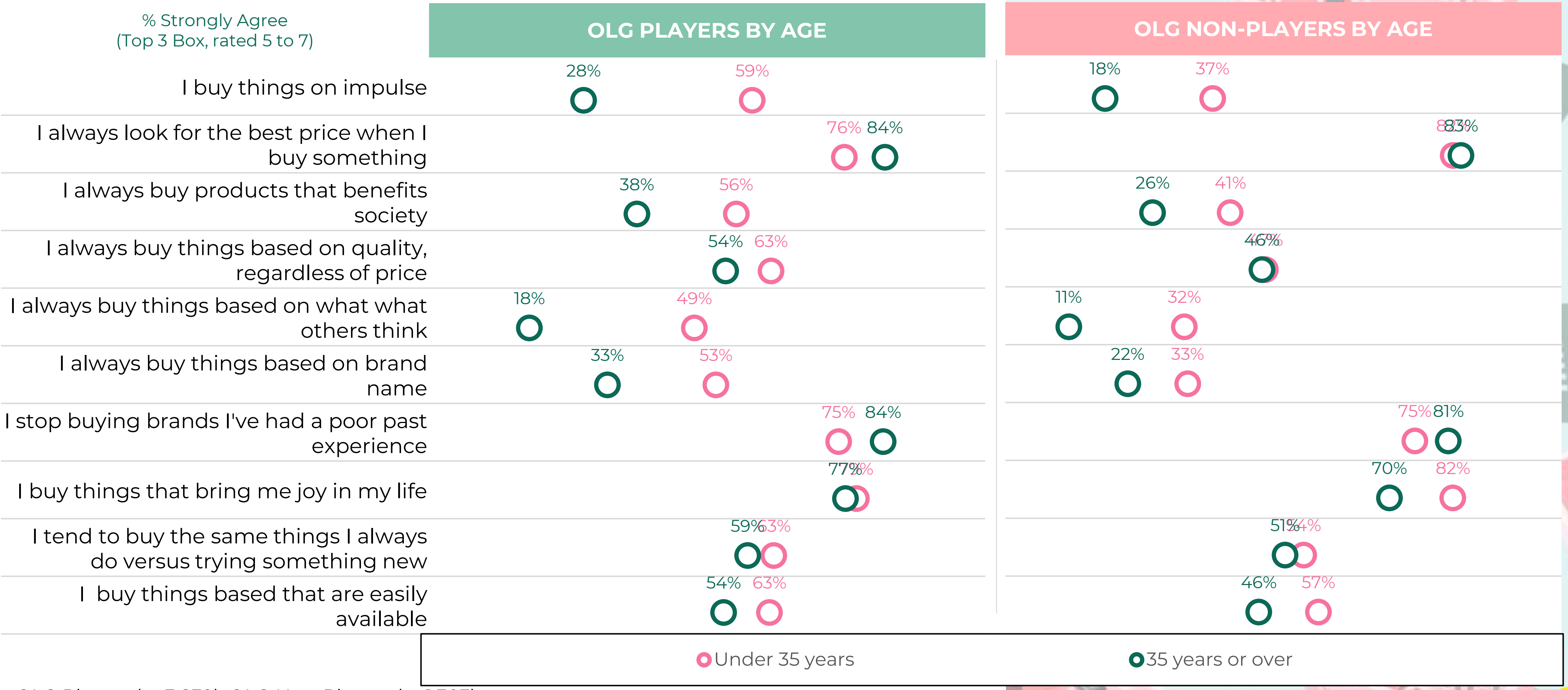
However, it becomes evident that the younger demographic is notably more swayed by impact, impulse and community influences. To be specific, brand name and peer perceptions carry greater weight for the younger cohort compared to their older counterparts. Additionally, they tend to exhibit more impulsive buying behaviors.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Purchase Behaviour

OLG PLAYERS V. NON-PLAYERS

Price, loyalty, enjoyment, and the overall customer experience hold high importance for players and non-players and across age groups. Yet, differences become evident when it comes to impulse buying, societal benefits, brand and peer influence. All these factors seem to be less important to non-players compared to players, suggesting again that their purchase behaviour is more rational.



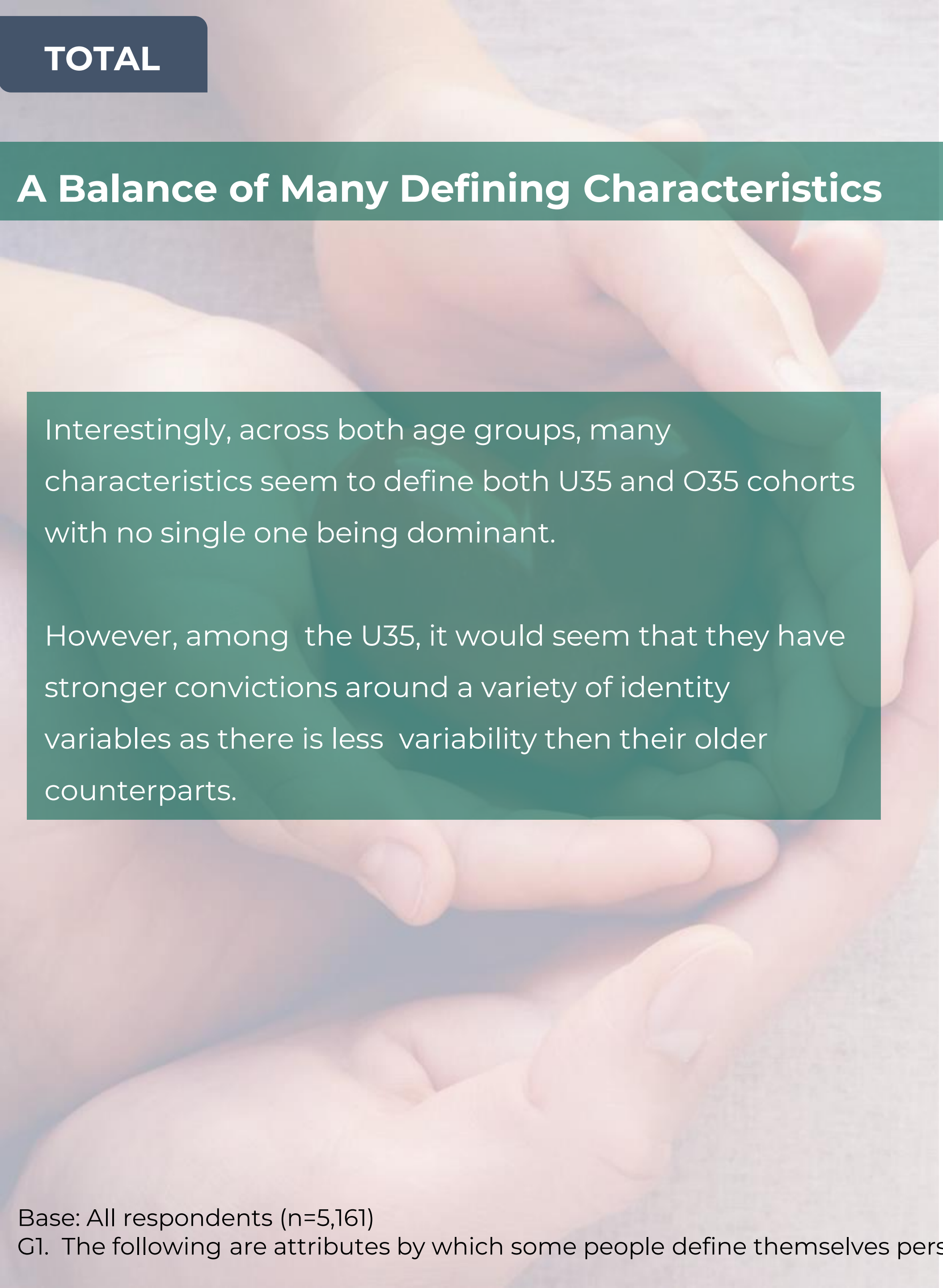
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

TOTAL

Self Identity

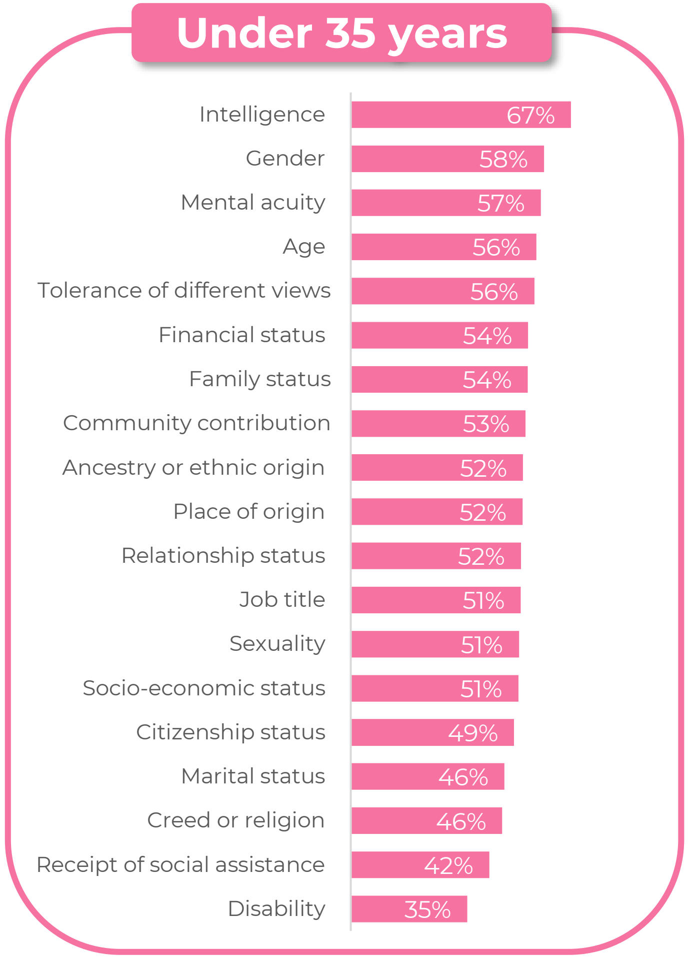
% Completely Defines Me
(Top 3 Box, rated 5 to 7)

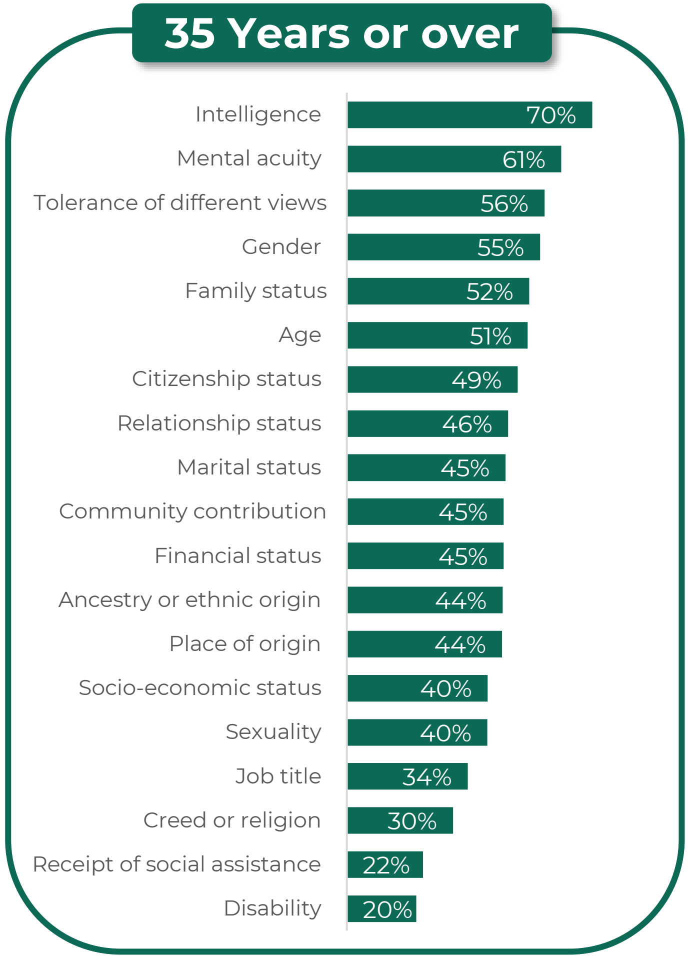
A Balance of Many Defining Characteristics



Interestingly, across both age groups, many characteristics seem to define both U35 and O35 cohorts with no single one being dominant.

However, among the U35, it would seem that they have stronger convictions around a variety of identity variables as there is less variability then their older counterparts.

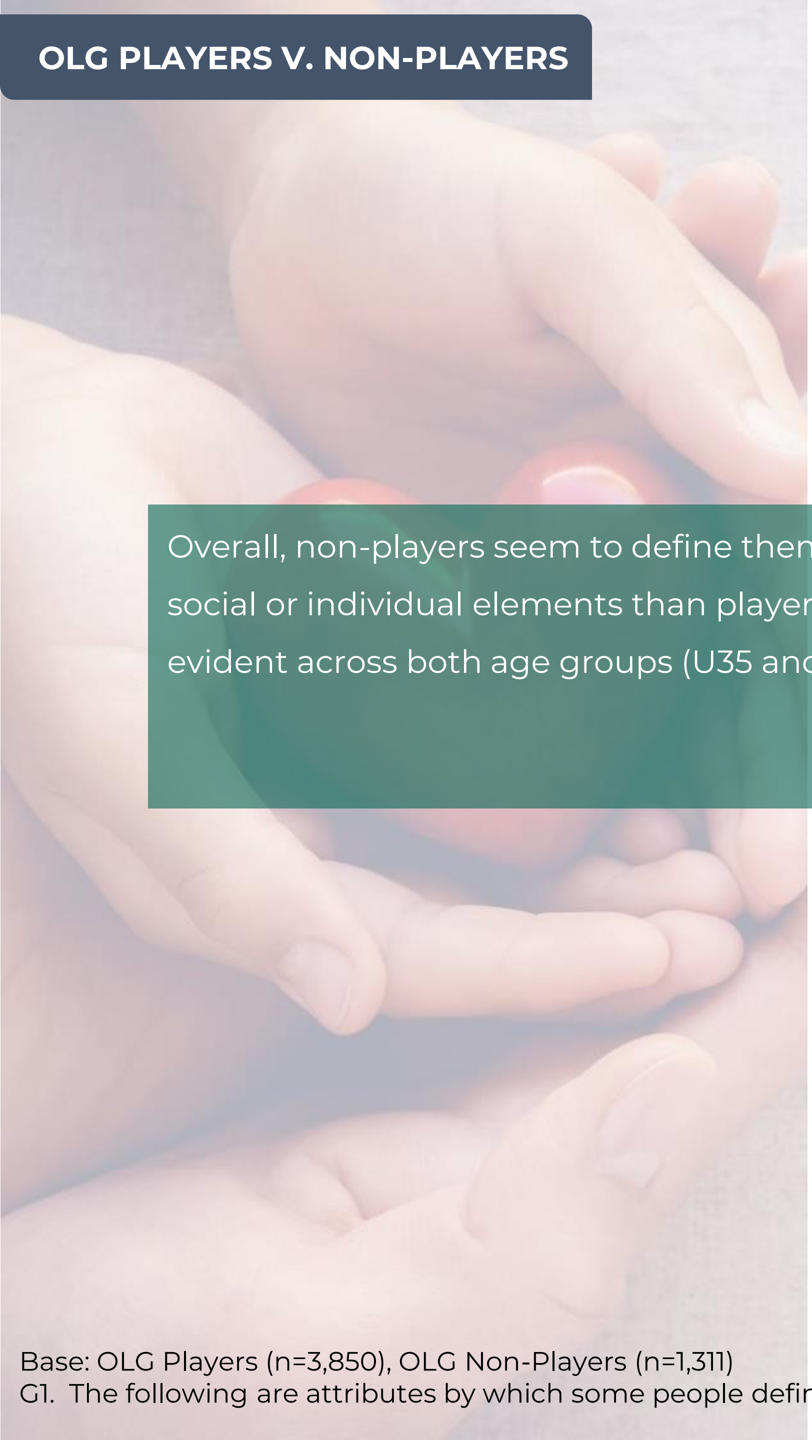




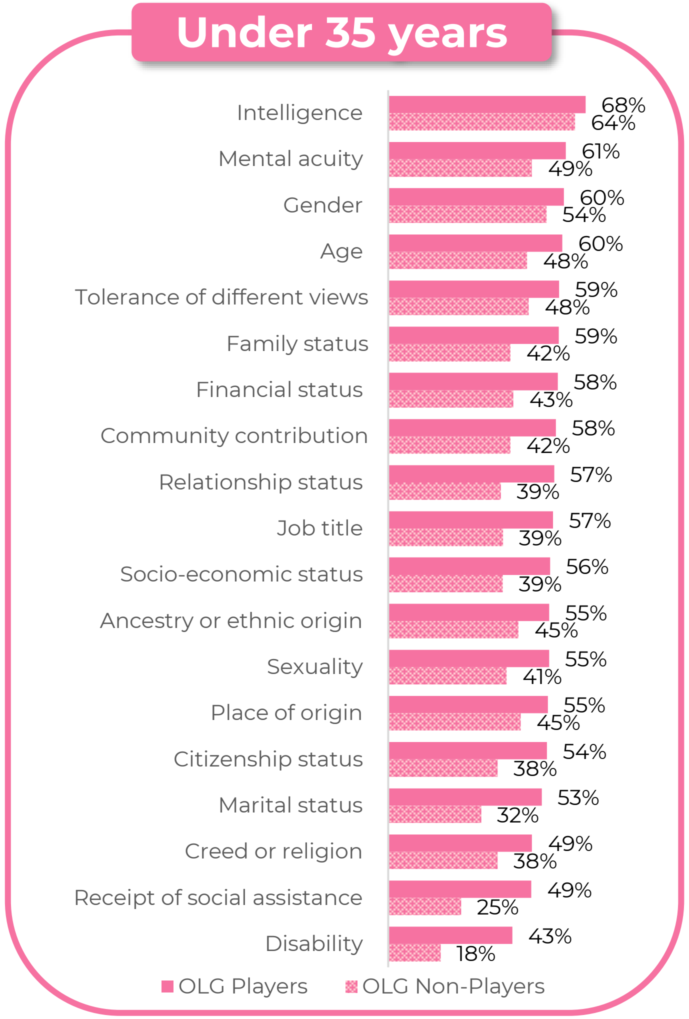
Base: All respondents (n=5,161)
G1. The following are attributes by which some people define themselves personally or socially. How much to the following define who you are as a human?

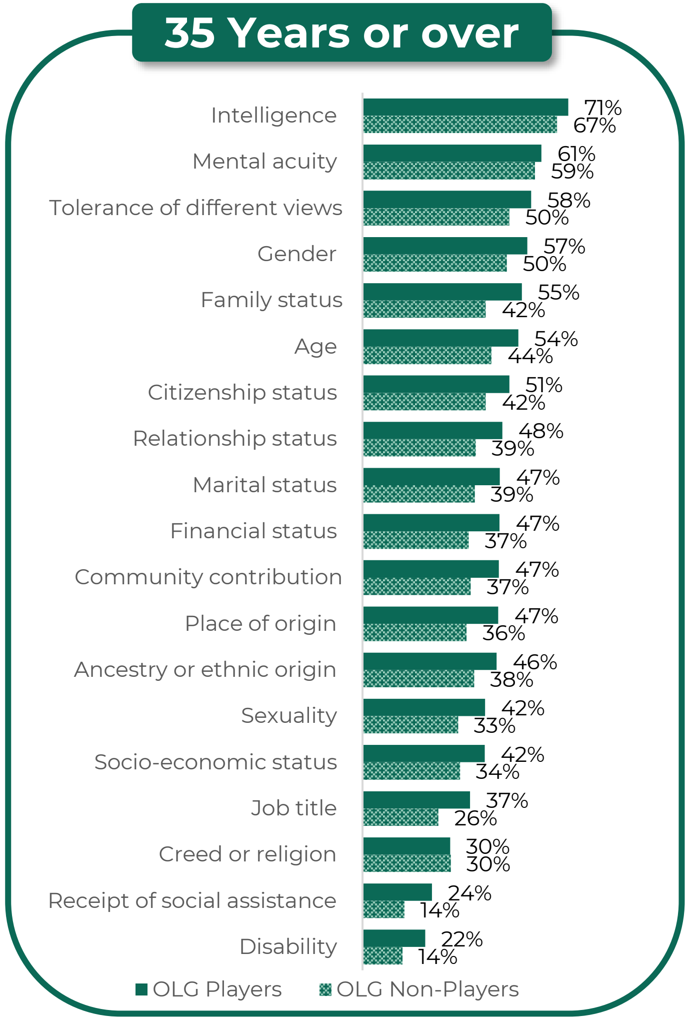
Self Identity

% Completely Defines Me
(Top 3 Box, rated 5 to 7)



Overall, non-players seem to define themselves less by social or individual elements than players and this is evident across both age groups (U35 and O35).





Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
G1. The following are attributes by which some people define themselves personally or socially. How much to the following define who you are as a human?

VALUES SUMMARY

As expected, U35 and O35 are quite different when it comes to their values and attitudes.

However, when we compare U35 Players vs. U35 Non-Players there are differences, which strengthens the perspective as to why all U35 can't be treated homogenously.

Value Theme	U35 Non-Player	U35 Player
Self-Perception	Less stable and less confident in their overall state, which restricts their ability to want to try new things, especially when the outcome is unclear.	Not stable but are confident in being in a state of transition and owning it. This allows to be more open to new experiences.
Future Pressure	Feels more pressure about the future, and not as likely for live for today. Less likely to take financial risk.	Feels pressure about the future but are optimistic and are willing to take more financial risk.
Connection & Community	Less social, more focused individually and not as easily influenced by others.	Socially driven, values community/family and gets easily swayed by others.
Technology & Social Media	Less engaged with social media, less open to trying new technology and more cautious in providing personal information online.	Rely on social media for human connection, and is important to their day to day lives,
Social Activism	Seem to be less vested in evoking change, standing up for others which may stem from the fact that they experience less stereotyping or judgement themselves compared to U35 players.	Players actively engage in addressing social issues, combating stereotypes.
Purchasing Influences	Impulse buying, societal benefits, brand and peer influence are less important, their purchase behaviour is more rational.	Brand name and peer perceptions carry greater weight Additionally, they tend to exhibit more impulsive buying behaviors.

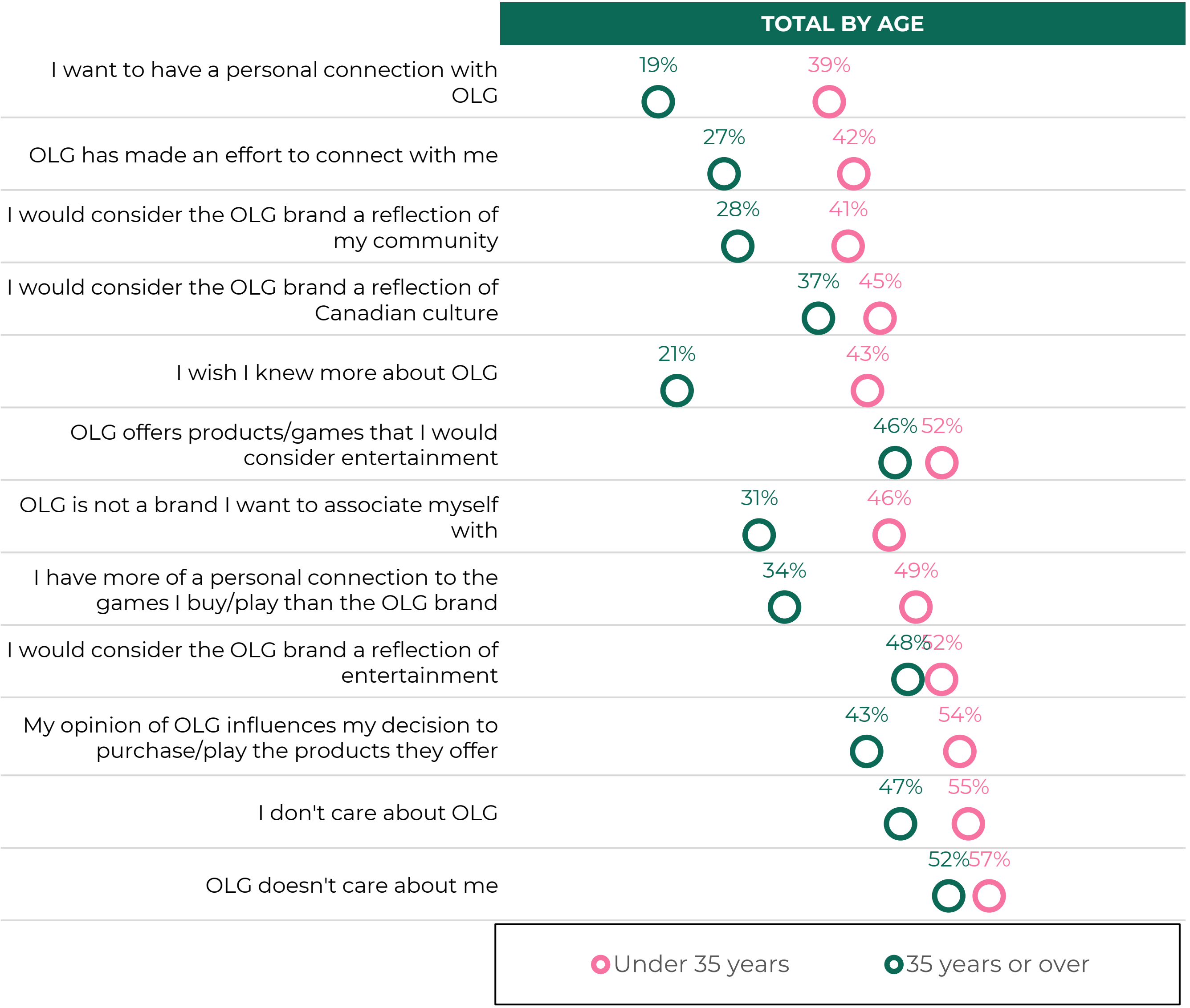
Brand Perceptions OLG

This section aims to unveil the perceptions and attitudes towards OLG and its gaming offerings.

OLG Brand Perceptions

% Strongly Agree
(Top 3 Box, rated 5 to 7

TOTAL



Base: All respondents (n=5,161)
C6 Thinking about OLG the brand, how would you rate the following attributes?

Opportunity for the OLG brand: Relevance and Connection

When it comes to the OLG brand, there does not seem to be a strong connection and personal relevance towards the OLG corporate brand overall which is evident for both age groups.

In terms of connection, only about 4 in 10 of U35 individuals want to have a connection to OLG, feel that OLG reflects their community or that OLG made an effort of connecting. In addition less than half of U35 consumers want to associate themselves with the OLG brand.

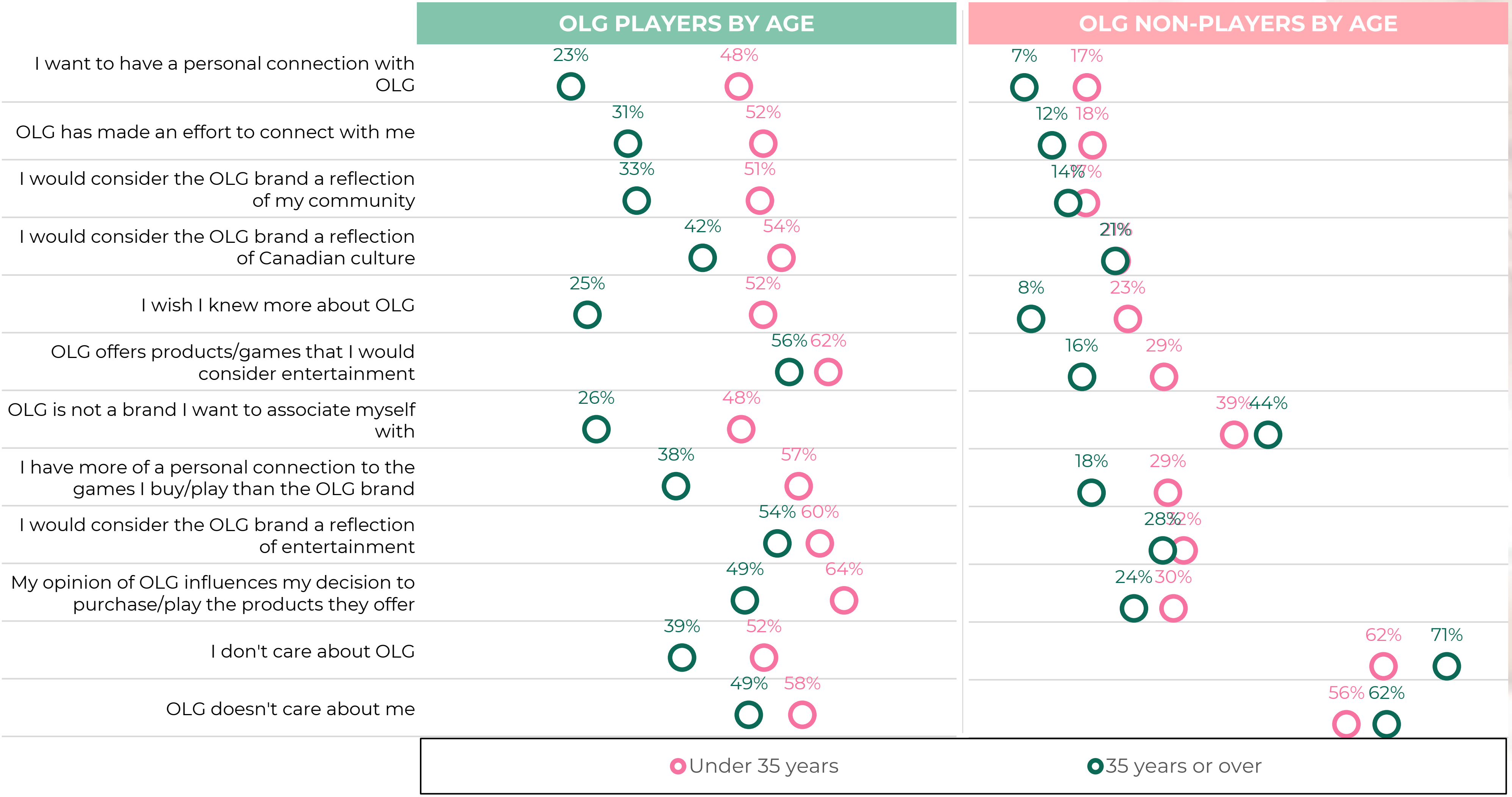
In terms of relevance, almost 6 in 10 among U35 feel that OLG does not care about them and in return, do not care about OLG.

OLG Brand Perceptions

OLG PLAYERS V. NON-PLAYERS

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG non-players have generally lower perceptions about the OLG brand and this is evident across both U35 and O35 age cohorts.



Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C6 Thinking about OLG the brand, how would you rate the following attributes?

Connecting Values and Brand

We know that OLG's brand does not strongly connect to any of the target's groups being assessed. Given the values scores of the U35 Non-Player group, are generally lower than the U35 Players, the opportunity is to consider this segment to me more of a introvert. Specifically, thinking about how your brand connects (in all aspects) in a way that evokes relevancy through individuality and not "trying to get noticed" vibes. We want players to think we care about them (56% think we don't care), without telling them we care about them. That could be a challenge in all aspects around how we want to market, develop product, experiences and channels.

Examples of Brand Tactics

Product: Develop Low Risk, Easy to Play, Quick Win offerings (no gimmicks) but focus on design and delivery not just trying to be "tech".

Partner: Build brand partnerships from all areas of the Customer Journey from pre purchase to redemption/validation to gain credibility and relevancy.

Marketing: less "tell" more "show". Show U35 "player campaigns" as opposed to just winners. This is our opportunity to keep it 100%...but uplifting.

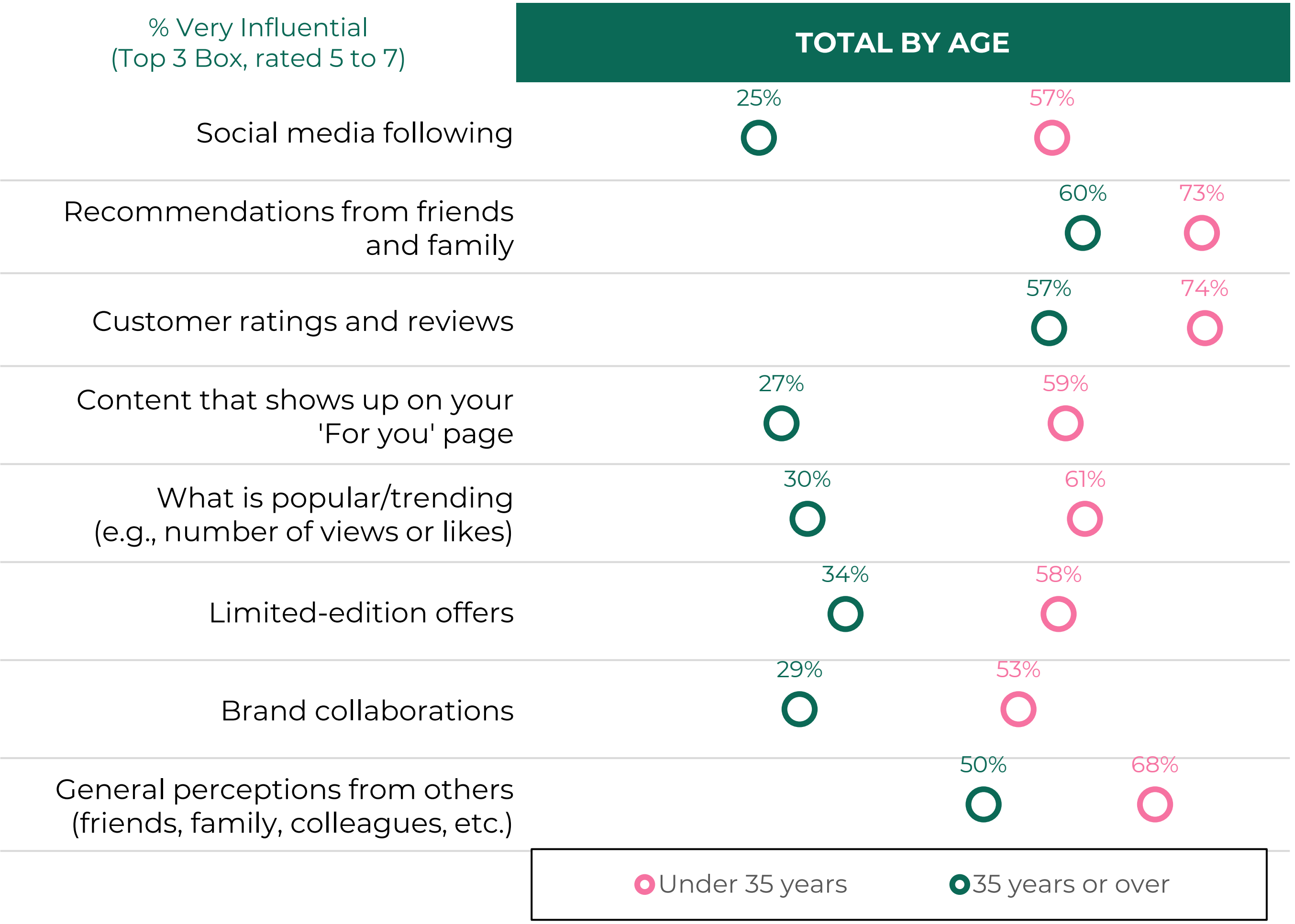
Channel: Expand to niche retail/digital location in a non-invasive way.

ENTERTAINMENT

The goal of this section is to offer insights into how consumers approach entertainment. It seeks to provide a distinct perspective on the emotional and rational triggers that drive their decisions.

Influencers on Entertainment Decisions

TOTAL



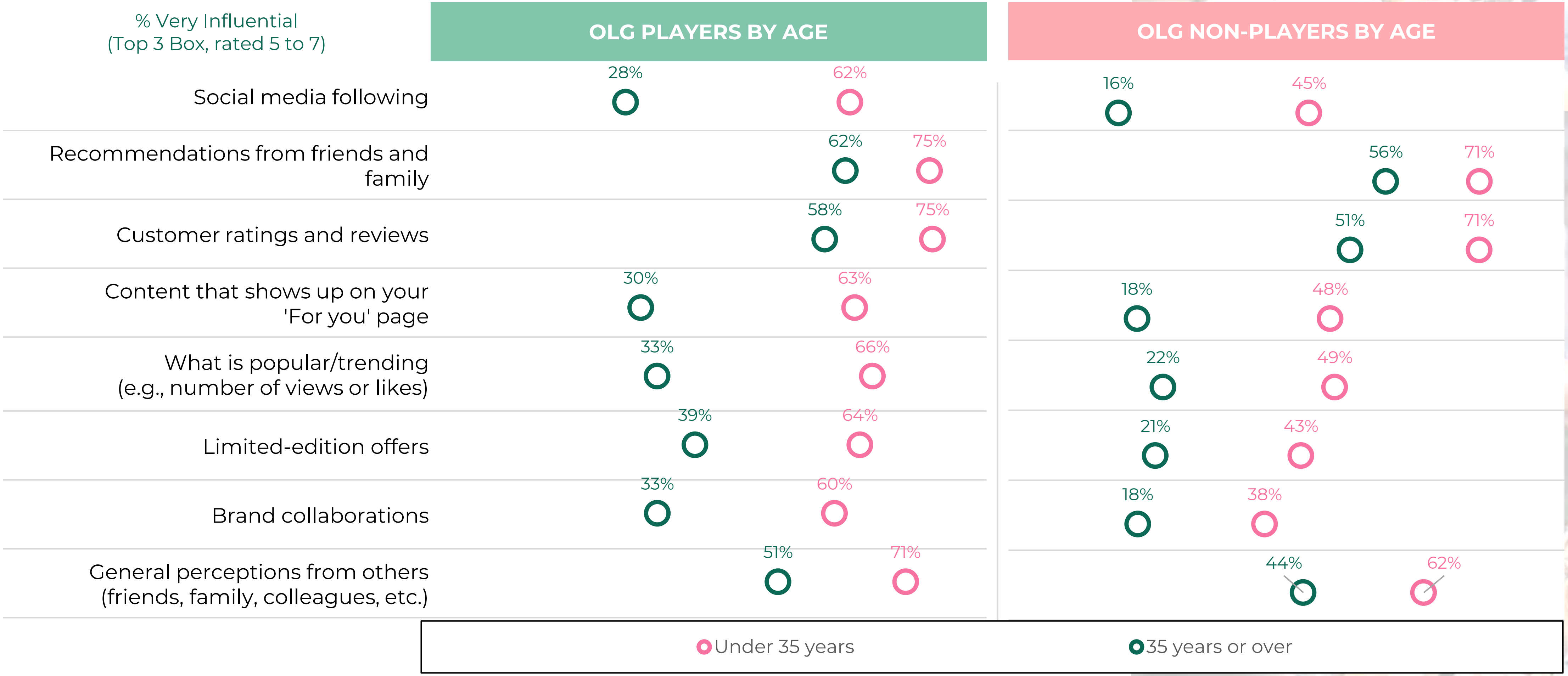
As with general purchasing decisions, when it comes to choosing new entertainment offerings, the younger age cohort's is highly influenced by external factors, such as friends, social media, followers, ratings and general perceptions from others.

Base: All respondents (n=5,161)
E3 How influential to your decision to find out, or trial, new leisure or entertainment products/brands are the following ?

Influencers on Entertainment Decisions

OLG PLAYERS V. NON-PLAYERS

External influencers play a role in entertainment decisions for both players and non-players. However, non-players that are younger seem somewhat more independent and less reliant on pop culture, social media, reviews/ratings and recommendations from others than the younger player group.



Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
E3 How influential to your decision to find out, or trial, new leisure or entertainment products/brands are the following ?

Top Entertainment Activities: Age

TOTAL

Both age cohorts widely engage in many entertainment activities. However, it is evident that U35 consumers' top entertainment choices revolve around digital, more so than their older counterparts where entertainment seems to be centred on the physical, real-world.

Under 35 years

ENTERTAINMENT ACTIVITY	P6M %
✓ Browsing social media	93%
✓ Streaming online music	92%
✓ Watching TV/movies at home via streaming	92%
✓ Going out to a restaurant	91%
✓ Shopping for non-essentials	89%
✓ Going out to a coffee shop	87%
✓ Trying a new restaurant	83%
✓ Review information online	82%
✓ Reading books/ebooks, listening to audio books/podcasts	82%
✓ Hosting or attending dinner parties	79%
✓ Play free games on mobile	79%
✓ Playing board games or card games	78%
✓ Drinking alcoholic beverages	77%

35 Years or over

ENTERTAINMENT ACTIVITY	P6M %
✓ Going out to a restaurant	87%
✓ Shopping for non-essentials	84%
✓ Watching TV/movies at home via streaming	81%
✓ Browsing social media	80%
✓ Going out to a coffee shop	79%
✓ Drinking alcoholic beverages	78%
✓ Reading books/ebooks, listening to audio book/podcasts	73%
✓ Streaming online music	69%
✓ Watching cable or PVR TV	69%
✓ Trying a new restaurant	68%
✓ Hosting or attending dinner parties	65%
✓ Review information online	59%

Base: All respondents (n=5,161)
A1 - When was the last time you participated in each of the following activities?

Top Entertainment Activities: Age

OLG PLAYERS

Similarly, when looking at OLG players, the younger cohort seems to be more engaged in digital entertainment activities than the O35 age group.

Under 35 years

ENTERTAINMENT ACTIVITY	P6M %
✓ Browsing social media	93%
✓ Watching TV/movies at home via streaming	93%
✓ Streaming online music	93%
✓ Going out to a restaurant	92%
✓ Shopping for non-essentials	91%
✓ Going out to a coffee shop	90%
✓ Review information online	86%
✓ Trying a new restaurant	86%
✓ Drinking alcoholic beverages	85%
✓ Reading books/ebooks, listening to audio books/podcasts	84%
✓ Hosting or attending dinner parties	84%
✓ Play free games on mobile	84%
✓ Playing board games or card games	83%

35 Years or over

ENTERTAINMENT ACTIVITY	P6M %
✓ Going out to a restaurant	89%
✓ Shopping for non-essentials	87%
✓ Watching TV/movies at home via streaming	83%
✓ Going out to a coffee shop	82%
✓ Browsing social media	82%
✓ Drinking alcoholic beverages	81%
✓ Reading books/ebooks, listening to audio books/podcasts	75%
✓ Watching cable or PVR TV	74%
✓ Streaming online music	71%
✓ Trying a new restaurant	70%
✓ Hosting or attending dinner parties	68%
✓ Going out to a restaurant	89%

Base: OLG Players (n=3,850)
A1 - When was the last time you participated in each of the following activities?

Top Entertainment Activities: Age

OLG NON-PLAYERS

When looking at non-players, it is evident that the older age cohort is less prone to engage in entertainment activities and this is true regardless of whether the entertainment is in the digital sphere or the real world.

Under 35 years

ENTERTAINMENT ACTIVITY	P6M %
✓ Browsing social media	92%
✓ Streaming online music	91%
✓ Watching TV/movies at home via streaming	90%
✓ Going out to a restaurant	87%
✓ Shopping for non-essentials	85%
✓ Going out to a coffee shop	80%
✓ Reading books/ebooks, listening to audio books/podcasts	75%
✓ Trying a new restaurant	75%
✓ Review information online	72%
✓ Hosting or attending dinner parties	68%
✓ Play free games on mobile	68%
✓ Playing board games or card games	64%
✓ Going to the cinema/movie theatre/drive-In	62%

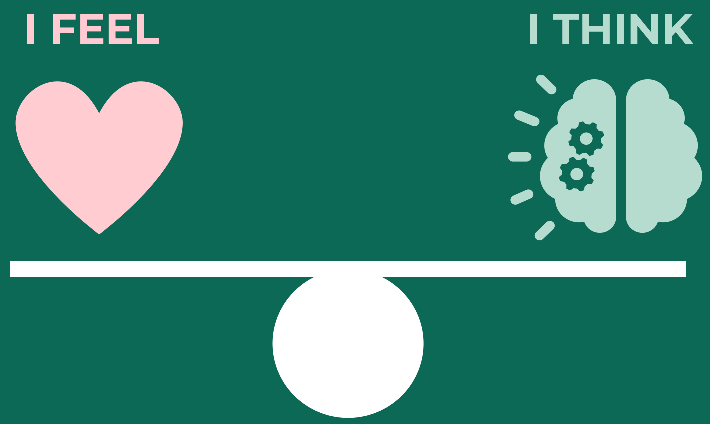
35 Years or over

ENTERTAINMENT ACTIVITY	P6M %
✓ Going out to a restaurant	79%
✓ Watching TV/movies at home via streaming	75%
✓ Shopping for non-essentials	75%
✓ Browsing social media	73%
✓ Going out to a coffee shop	69%
✓ Reading books/ebooks, listening to audio books/podcasts	67%
✓ Drinking alcoholic beverages	66%
✓ Streaming online music	63%
✓ Trying a new restaurant	61%
✓ Hosting or attending dinner parties	56%
✓ Watching cable or PVR TV	53%
✓ Review information online	52%

Base: OLG Non-Players (n=1,311)
A1 - When was the last time you participated in each of the following activities?

ENTERTAINMENT NEEDS

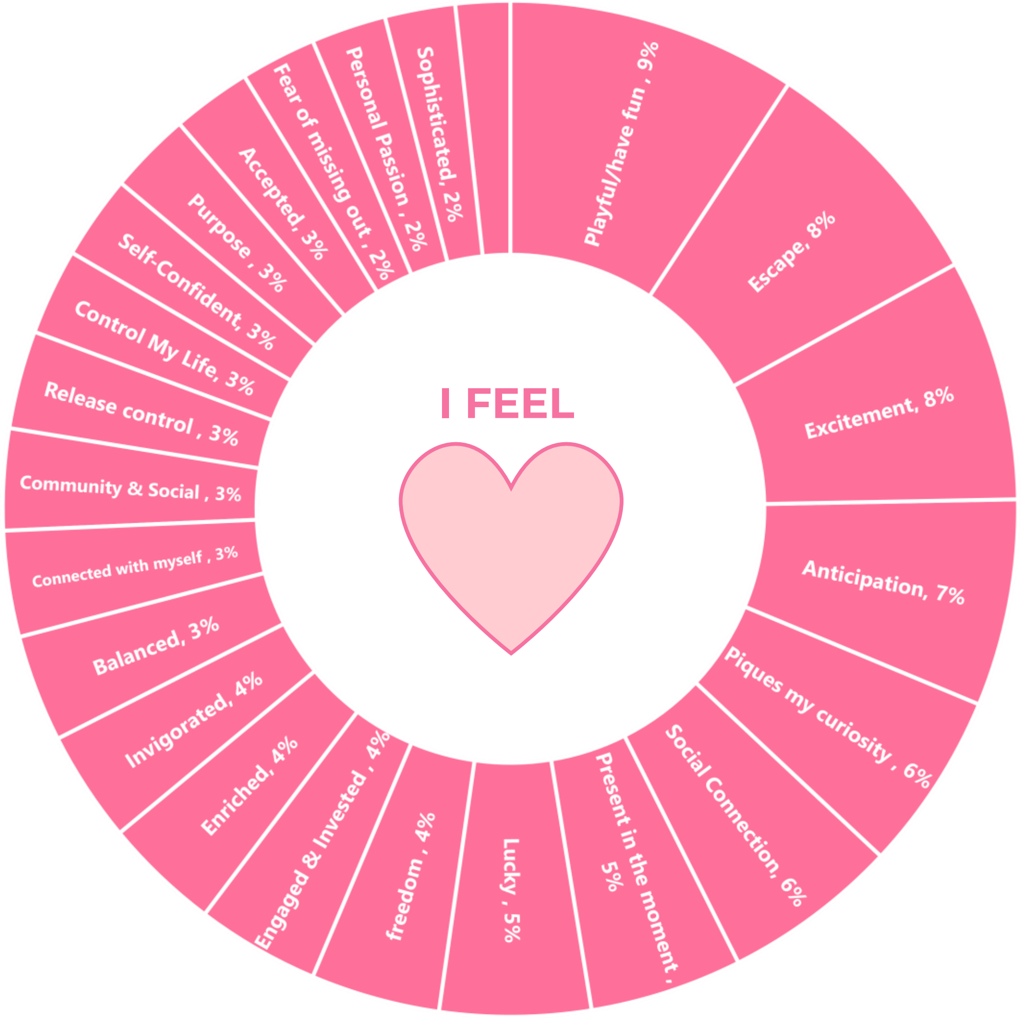
Exploring the Activities of age cohort helps us discern the competitive landscape but to truly understand their relationship with entertainment, delving into consumers' underlying needs is required.



Therefore, we have assessed entertainment choices through the lens of Emotional (How I feel) and Functional (What I think) benefits that individuals seek to fulfil through their recent engagement in entertainment activities.

The Emotional Needs

Emotions Wheel



We examined 24 distinct emotional need states, subjecting them to a factor analysis to explore potential combinations. Remarkably, the emotional needs states attributes exhibited enough distinctiveness to remain individually discernible. This intricacy underscores the multifaceted nature of consumer sentiments in their pursuit of entertainment choices.

Given this, we conducted a correspondence analysis to understand the relative importance of different emotional needs states attributes within and across subgroups (age subgroup, OLG players vs. OLG non-players). This insight enables a deeper understanding of their unique characteristics and offers valuable guidance on how to appeal to their specific emotional needs.

Base: Among those 'not never' in activity at A1 (Base size varies)
A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

EMOTIONAL NEEDS – UNDERSTANDING WHAT MATTERS

Purpose: We used **Correspondence Analysis (CA)** to reveal the relative relationships between emotional needs states attributes and our subgroups of interest (OLG players U35, OLG non-players U35, OLG players O35, OLG non-players O35). In essence, this allows us to understand which emotional needs states attributes 'matter' most as well as the similarities and differences.

The results from CA are shown on the next few slides with the help of isotherms, following this overall outline:

1. What are similarities/differences within and between emotional needs attributes by the consumer four sub-groups?
2. Which OLG and non-OLG activities are associated with the top 5 emotional needs attributes?
    - For each consumer sub-group

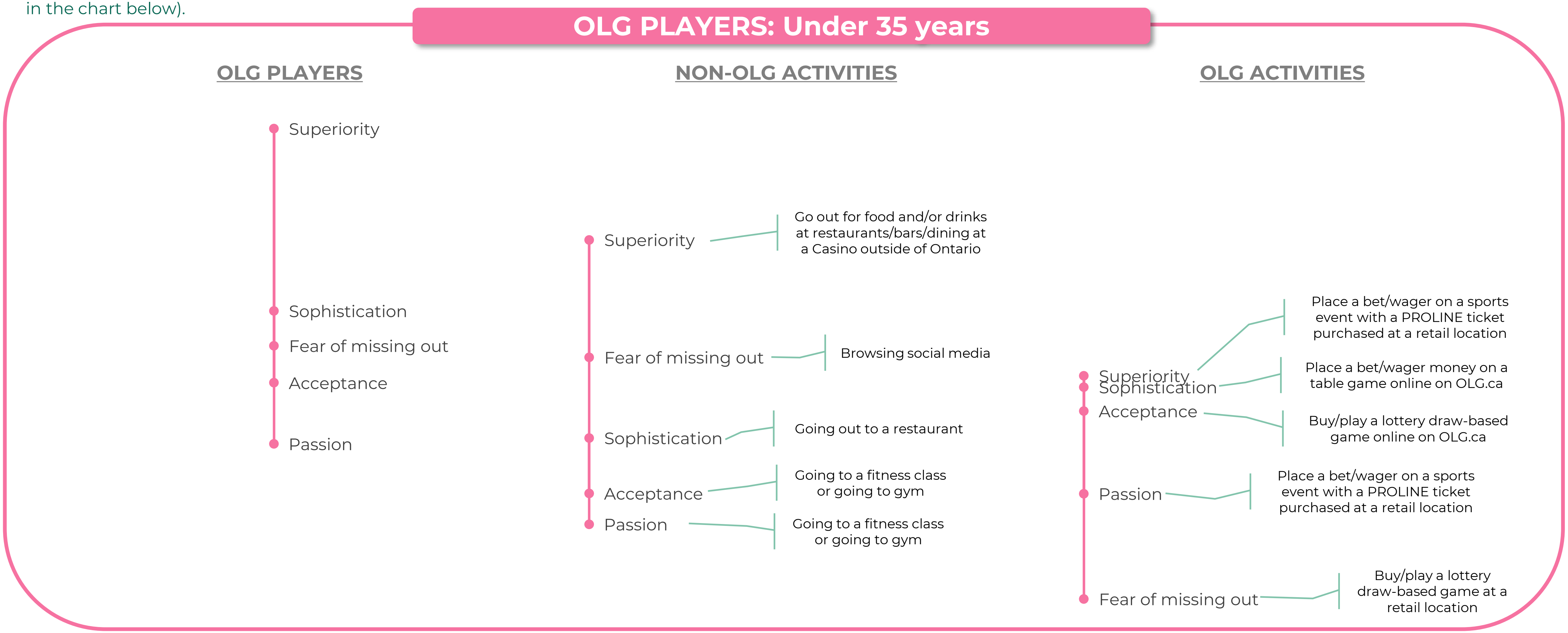
The Emotional Needs

OLG players (both U35 and O35) have more diverse needs than OLG non-players, with the U35 player group displaying the most varied emotional needs. Besides the variation in needs, another point of differentiation is which emotional needs resonate most for each group. Here, we see stark differences both players and non-players within and across the age subgroups. This is important for OLG to consider when it comes to strategies to further relevance, engagement and usage. In other words, a differentiated approach speaking to each sub-group may need to be explored.

Base: Among those 'not never' in activity at A1 (Base size varies)
A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

The Emotional Needs

When looking at how well the top 5 emotional needs for OLG players U35 are met, several learning emerge: First, for each emotional need, OLG does seem to have an offering that speaks to the respective need, e.g. for the need for superiority, PROLINE sports betting seem to have good potential to speak to individuals needs for superiority. However, it also becomes evident, that non-OLG offerings are better able to meet the top 5 needs of U35 players a (as shown by the higher/lower placement of the isotherms relative to each other in the chart below).



OLG PLAYERS: Under 35 years

OLG PLAYERS

- Superiority
- Sophistication
- Fear of missing out
- Acceptance
- Passion

NON-OLG ACTIVITIES

- Superiority – Go out for food and/or drinks at restaurants/bars/dining at a Casino outside of Ontario
- Fear of missing out – Browsing social media
- Sophistication – Going out to a restaurant
- Acceptance – Going to a fitness class or going to gym
- Passion – Going to a fitness class or going to gym

OLG ACTIVITIES

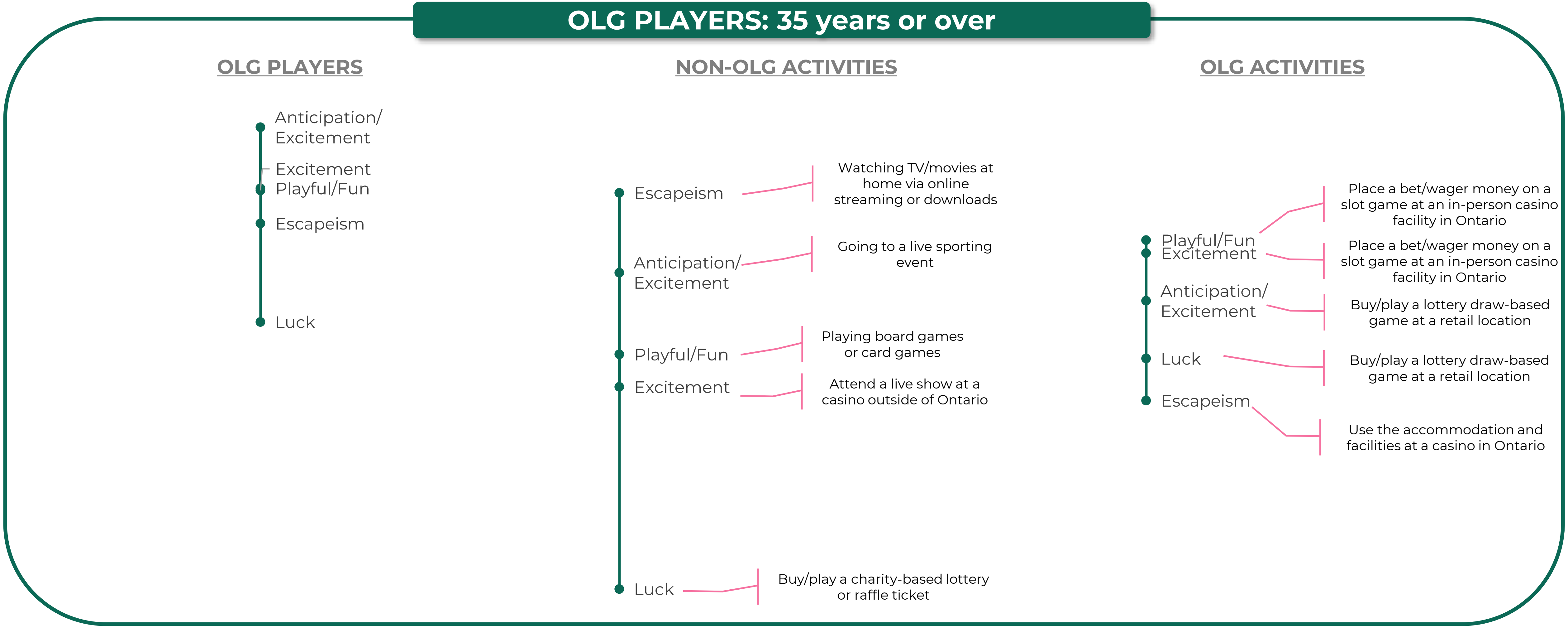
- Superiority – Place a bet/wager on a sports event with a PROLINE ticket purchased at a retail location
- Sophistication – Place a bet/wager money on a table game online on OLG.ca
- Acceptance – Buy/play a lottery draw-based game online on OLG.ca
- Passion – Place a bet/wager on a sports event with a PROLINE ticket purchased at a retail location
- Fear of missing out – Buy/play a lottery draw-based game at a retail location

Base: Among those ‘not never’ in activity at A1 (Base size varies)
A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

The Emotional Needs

For OLG players 35 or older, OLG's offerings 'perform' better and even outperform competing offerings (Non OLG activities) in their ability to meet the top 5 emotional needs. Specifically, for 'luck' and 'anticipation' OLG's lottery games outperform non-OLG activities, while for playful/fun, escapism and excitement, OLG offerings are somewhat trailing competing offerings, but to a lesser extent than for the younger players.

OLG PLAYERS: 35 years or over



OLG PLAYERS

- Anticipation/ Excitement
- Excitement
- Playful/Fun
- Escapeism
- Luck

NON-OLG ACTIVITIES

Escapeism	Watching TV/movies at home via online streaming or downloads
Anticipation/ Excitement	Going to a live sporting event
Playful/Fun	Playing board games or card games
Excitement	Attend a live show at a casino outside of Ontario
Luck	Buy/play a charity-based lottery or raffle ticket

OLG ACTIVITIES

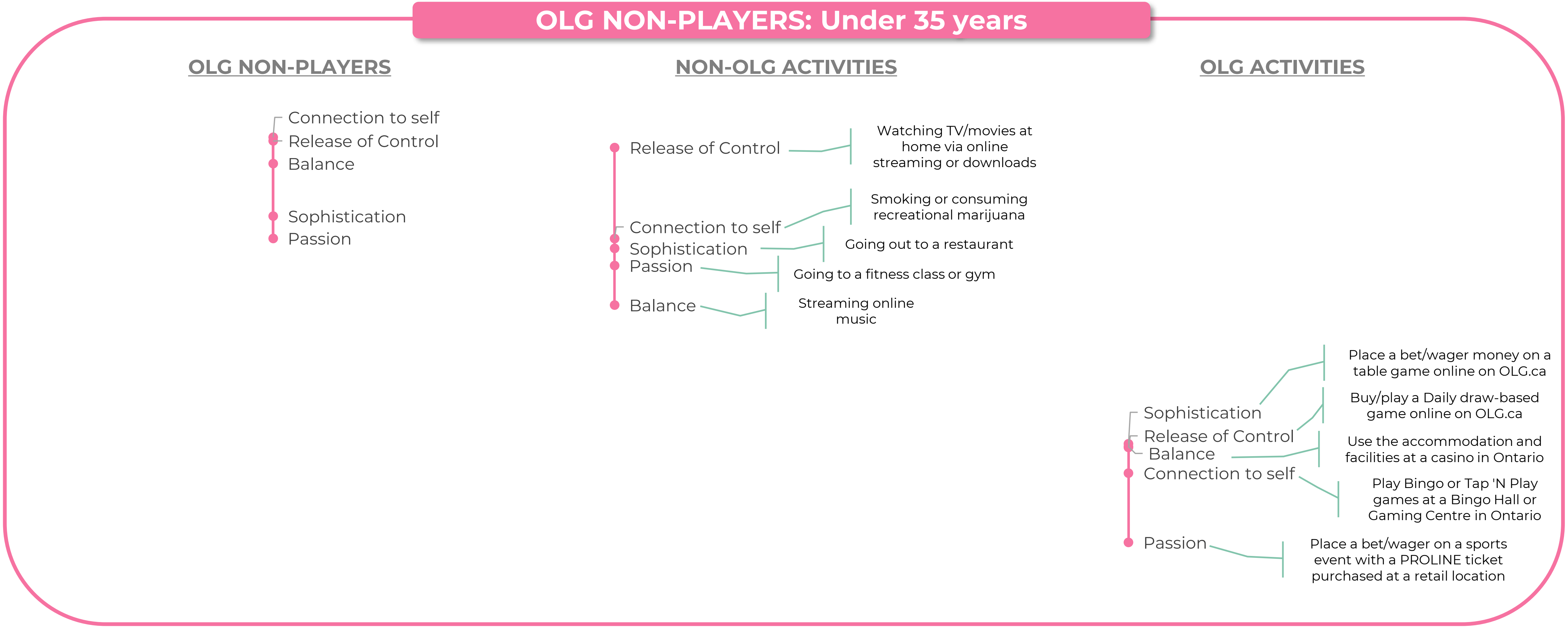
Playful/Fun	Place a bet/wager money on a slot game at an in-person casino facility in Ontario
Excitement	Place a bet/wager money on a slot game at an in-person casino facility in Ontario
Anticipation/ Excitement	Buy/play a lottery draw-based game at a retail location
Luck	Buy/play a lottery draw-based game at a retail location
Escapeism	Use the accommodation and facilities at a casino in Ontario

Base: Among those 'not never' in activity at A1 (Base size varies)

A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

The Emotional Needs

For the U35 non-player group, we notice a large gap with current OLG offerings when it comes to the top 5 emotional needs attributes. While some of OLG's offerings do appeal to the top 5 needs for this consumer group, they are underperforming when it comes to the needs' importance and also when it comes to competing offerings. This offers opportunities for OLG to consider in their strategy to build relevance.



OLG NON-PLAYERS: Under 35 years

OLG NON-PLAYERS

Connection to self
Release of Control
Balance
Sophistication
Passion

NON-OLG ACTIVITIES

Release of Control
Watching TV/movies at home via online streaming or downloads

Connection to self
Smoking or consuming recreational marijuana

Sophistication
Going out to a restaurant

Passion
Going to a fitness class or gym

Balance
Streaming online music

OLG ACTIVITIES

Sophistication
Place a bet/wager money on a table game online on OLG.ca

Release of Control
Buy/play a Daily draw-based game online on OLG.ca

Balance
Use the accommodation and facilities at a casino in Ontario

Connection to self
Play Bingo or Tap 'N Play games at a Bingo Hall or Gaming Centre in Ontario

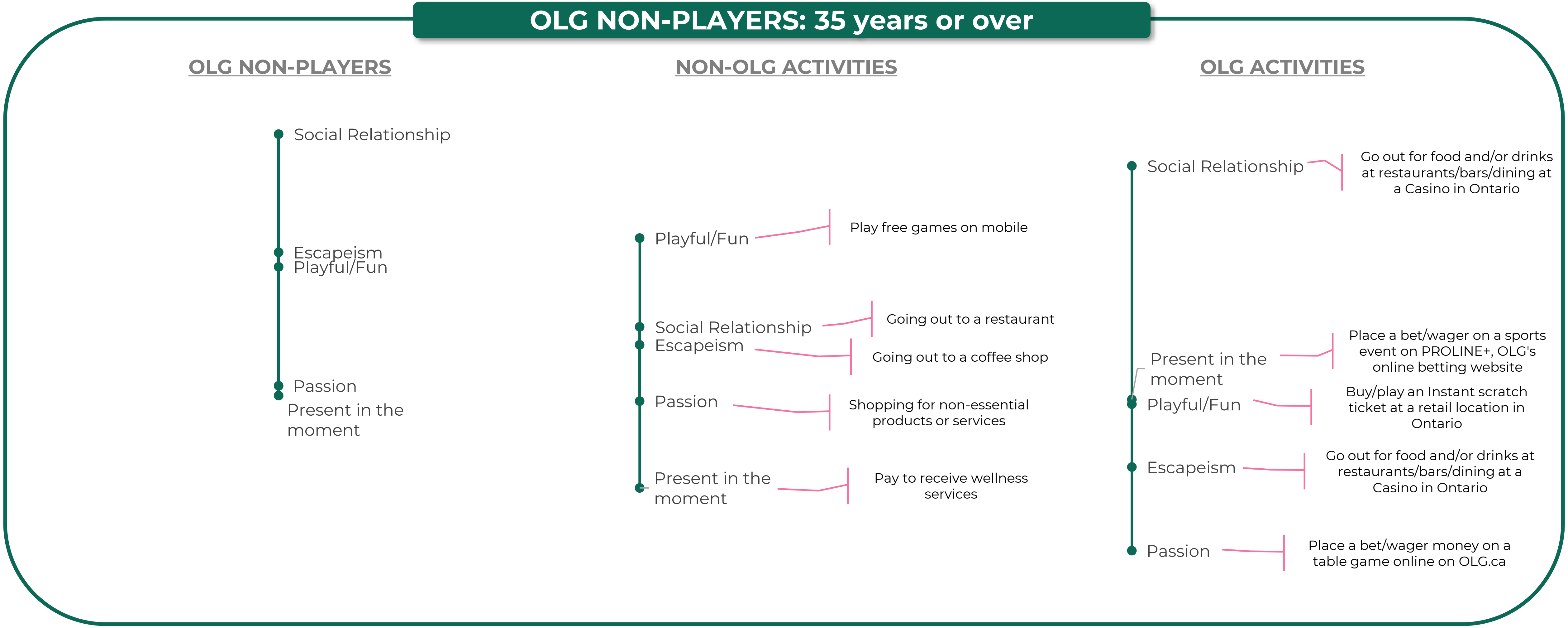
Passion
Place a bet/wager on a sports event with a PROLINE ticket purchased at a retail location

Base: Among those 'not never' in activity at A1 (Base size varies)
A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

The Emotional Needs

For OLG non-players who are 35 or older, OLG offerings are performing well in terms of the top 5 needs when it comes to emotional needs of "present in the moment" (PROLINE), and "social relationships" (ON Casino amenities) and even outperforming competing, non-OLG offerings. However, opportunities exist to further the other important emotional needs states through OLG offerings, particularly the aspects of playful/fun, escapism and passion.

OLG NON-PLAYERS: 35 years or over



OLG NON-PLAYERS

- Social Relationship
- Escapeism
- Playful/Fun
- Passion
- Present in the moment

NON-OLG ACTIVITIES

- Playful/Fun – Play free games on mobile
- Social Relationship – Going out to a restaurant
- Escapeism – Going out to a coffee shop
- Passion – Shopping for non-essential products or services
- Present in the moment – Pay to receive wellness services

OLG ACTIVITIES

- Social Relationship – Go out for food and/or drinks at restaurants/bars/dining at a Casino in Ontario
- Present in the moment – Place a bet/wager on a sports event on PROLINE+, OLG's online betting website
- Playful/Fun – Buy/play an Instant scratch ticket at a retail location in Ontario
- Escapeism – Go out for food and/or drinks at restaurants/bars/dining at a Casino in Ontario
- Passion – Place a bet/wager money on a table game online on OLG.ca

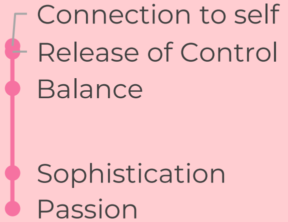
Base: Among those 'not never' in activity at A1 (Base size varies)
A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

THE EMOTIONAL NEEDS – U35

U35 PLAYERS

- Superiority
- Sophistication
- Fear of missing out
- Acceptance
- Passion

U35 NON-PLAYERS



- Connection to self
- Release of Control
- Balance
- Sophistication
- Passion

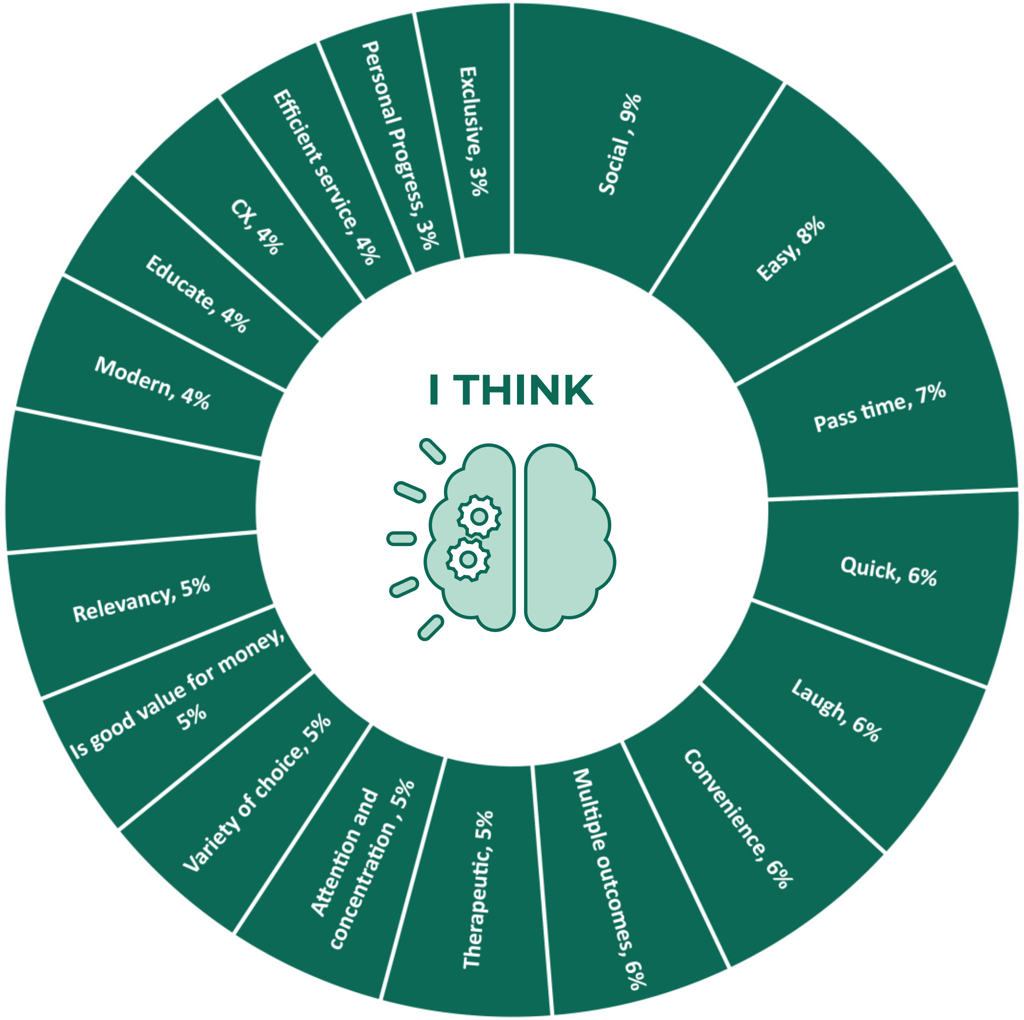
Emotional Relevant To U35?

To be emotionally relevant to the U35 Segment, OLG should take a Non-Player/Player perspective as their needs and magnitude of importance are different.

OLG should focus on developing new offerings that could deliver on these. Some needs seem have more of a connection to game development (Release Control, FOMO, Connection to self, Passion), where others may have more of relevancy for Experience Design (Superiority, Sophistication, Acceptance, and Balance). We can leverage the competitive set for ideation but would not only rely on this as we the OLG category is unique and should be managed as such.

The Functional Needs

Functional Wheel



We examined 19 distinct functional need states and conducted a factor analysis to identify potential combinations. Similar to the emotional needs states, the functional attributes retained their distinctiveness, mirroring the complexity observed in the emotional domain. This finding underscores the diverse functional needs arising from the wide array of consumer-preferred activities.

A crucial focus lies in pinpointing unique attributes associated with each consumer segment, offering valuable insights into their individual characteristics and how to cater to their functional needs effectively.

Base: Among those 'not never' in activity at A1 (Base size varies)
A4. You will see a set of statements that describe what people may think are benefits when participating in different activities. Please select up to five statements that are best/most applicable to you when participating in the activity.

FUNCTIONAL NEEDS – UNDERSTANDING WHAT MATTERS

Similar to the emotional needs attributes analysis, we used **Correspondence Analysis (CA)** to reveal the relative relationships between functional needs states attributes and our subgroups of interest (OLG players U35, OLG non-players U35, OLG players O35, OLG non-players O35). In essence, this allows us to understand which functional needs states attributes 'matter' most and also the similarities and differences.

The results from CA are shown on the next few slides with the help of isotherms, following this overall outline:

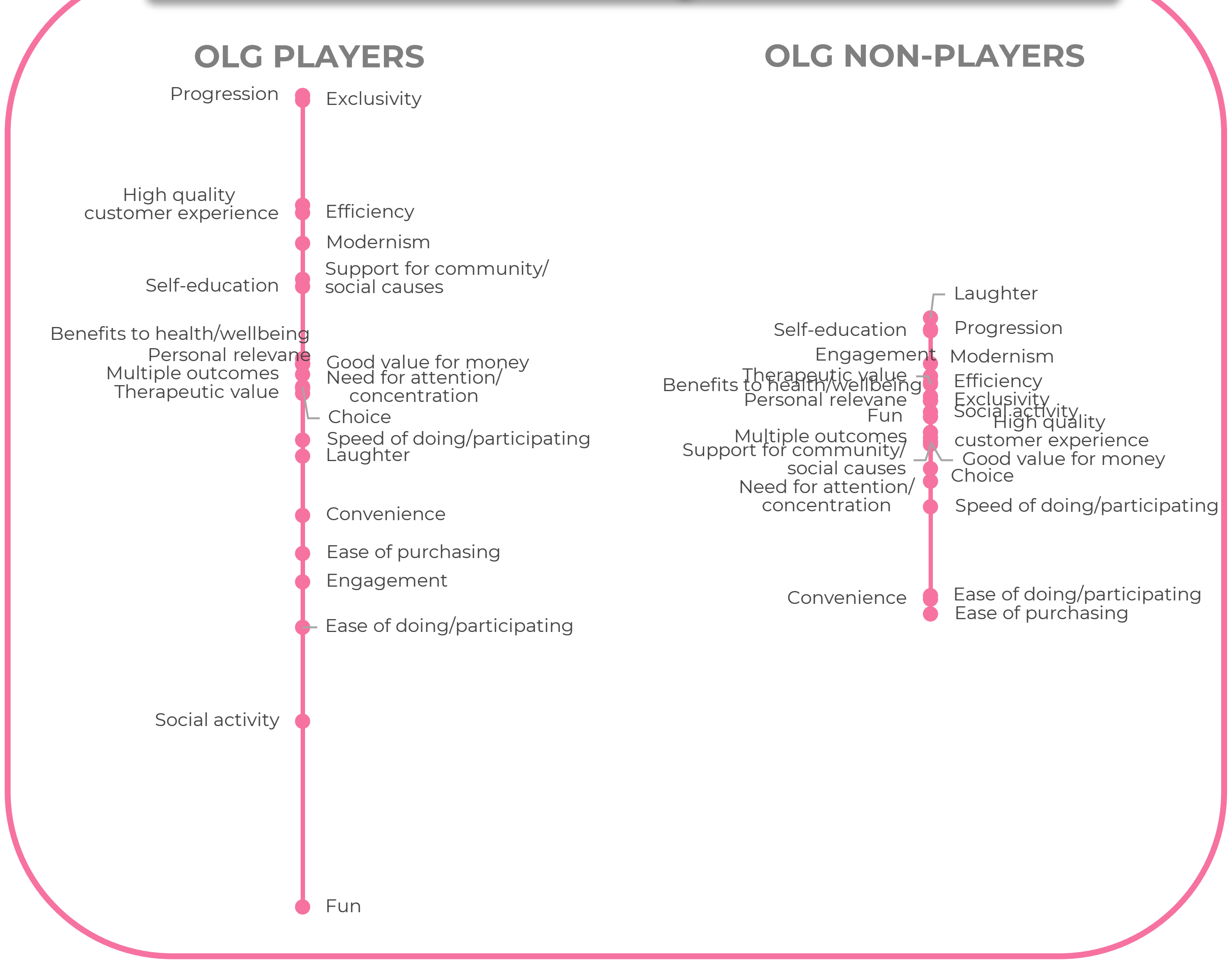
1. What are similarities/differences within and between functional needs attributes by the consumer four sub-groups?
2. Which OLG and non-OLG activities are associated with the top 5 functional needs attributes?
    - For each consumer sub-group

The Functional Needs

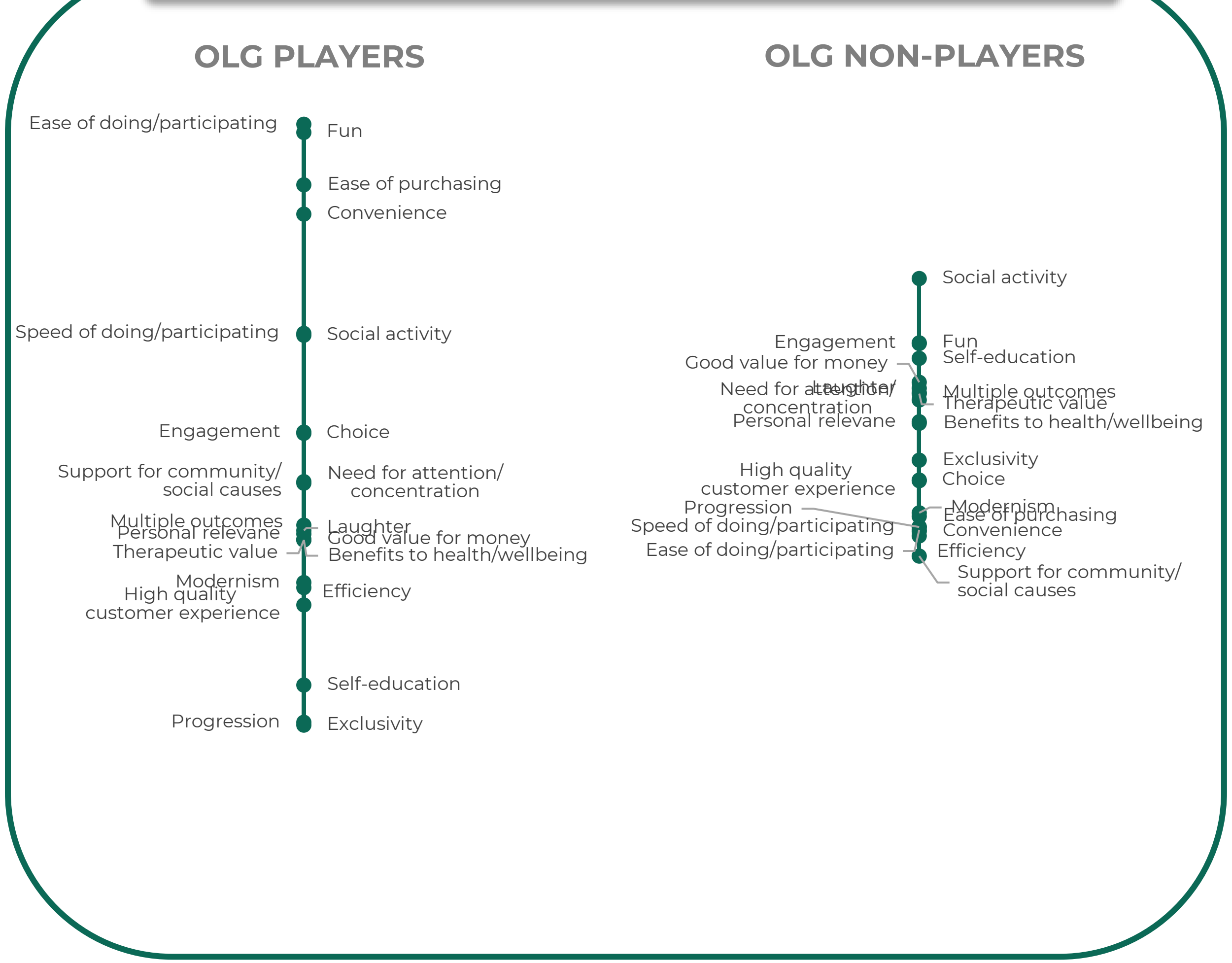
OLG PLAYERS V. NON-PLAYERS

Similar to the emotional needs states, OLG players (both U35 and O35) have more diverse functional needs than OLG non-players, with the U35 player group displaying the most varied functional needs. In addition, we can also see that there are stark differences in *which* functional needs resonate most for each group. For example, while "fun" seems to be the most important need for older players, this specific need is the least important to the under 35 players.

Under 35 years



35 Years or over

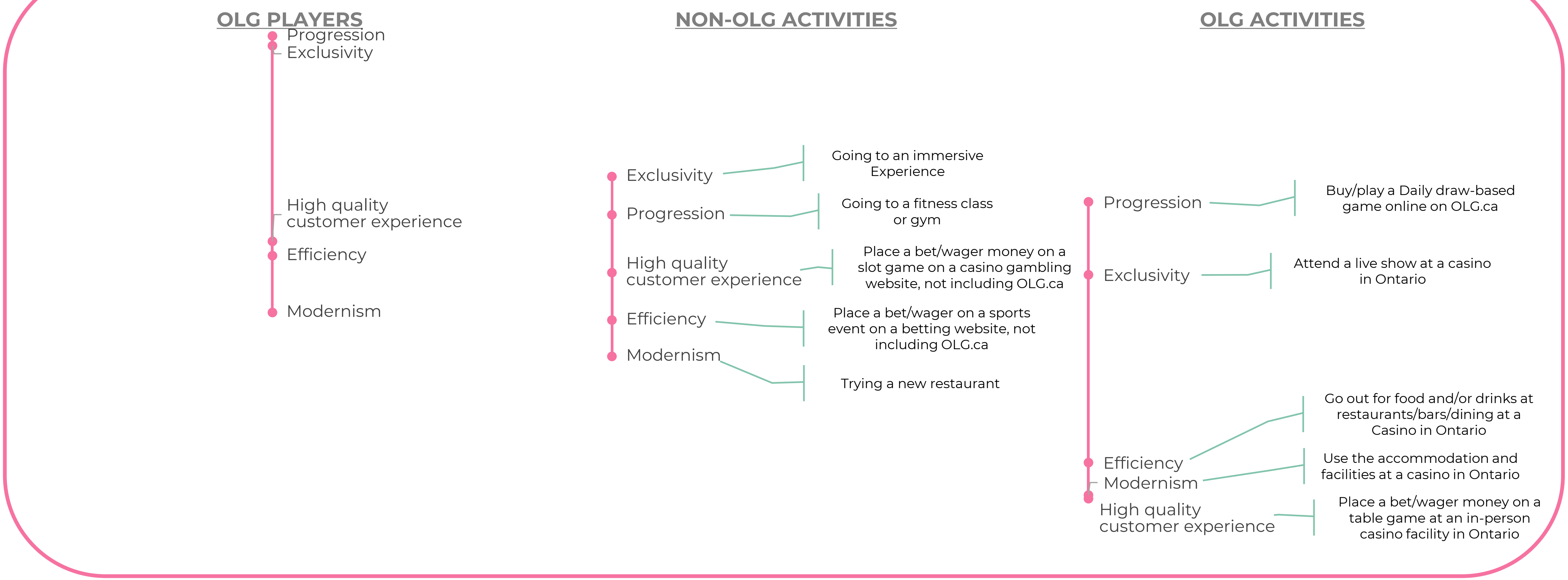


Base: Among those 'not never' in activity at A1 (Base size varies)
A4. You will see a set of statements that describe what people may think are benefits when participating in different activities. Please select up to five statements that are best/most applicable to you when participating in the activity.

The Functional Needs

Currently, non-OLG offerings seem to better meeting the top 5 functional needs for the younger non-players, with the exception of the need for ‘progression’, where OLG’s lottery offering seems to perform on par with competing offering. The gap seems to be particularly evident when it comes to the functional need related to a high-quality customer customer experience, which may require further understanding.

OLG PLAYERS: Under 35 years



OLG PLAYERS

- Progression
- Exclusivity
- High quality customer experience
- Efficiency
- Modernism

NON-OLG ACTIVITIES

- Exclusivity — Going to an immersive Experience
- Progression — Going to a fitness class or gym
- High quality customer experience — Place a bet/wager money on a slot game on a casino gambling website, not including OLG.ca
- Efficiency — Place a bet/wager on a sports event on a betting website, not including OLG.ca
- Modernism — Trying a new restaurant

OLG ACTIVITIES

- Progression — Buy/play a Daily draw-based game online on OLG.ca
- Exclusivity — Attend a live show at a casino in Ontario
- Efficiency — Go out for food and/or drinks at restaurants/bars/dining at a Casino in Ontario
- Modernism — Use the accommodation and facilities at a casino in Ontario
- High quality customer experience — Place a bet/wager money on a table game at an in-person casino facility in Ontario

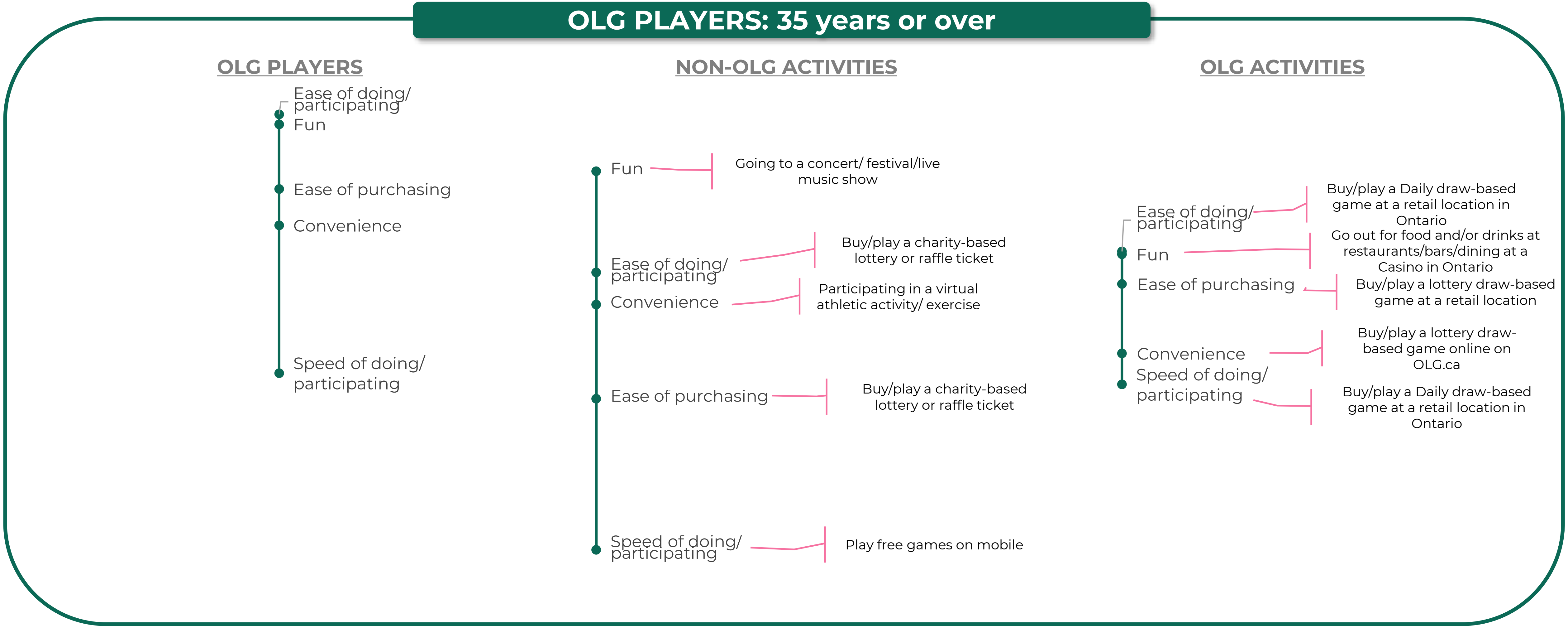
Base: Among those ‘not never’ in activity at A1 (Base size varies)
A3. You will see a set of statements that describe how people may FEEL when participating in different activities. Please select up to five statements that are best/most applicable to you personally when participating in the activity

The Functional Needs

OLG PLAYERS

For OLG players 35 or older, like our findings on the emotional needs, OLG's offerings 'perform' more in line with the top 5 needs and even outperform competing offerings in their ability to meet the top 5 emotional needs. Specifically, for 'speed' and 'ease' of participating and 'ease of purchase'' OLG's offerings outperform non-OLG activities. This is particularly beneficial as ease of participating is the most important functional need for this consumer group. However, when it comes to 'fun' which ranks only slightly lower than ease of doing opportunities exist to better connect OLG offerings to this need.

OLG PLAYERS: 35 years or over



OLG PLAYERS

- Ease of doing/ participating
- Fun
- Ease of purchasing
- Convenience
- Speed of doing/ participating

NON-OLG ACTIVITIES

- Fun — Going to a concert/ festival/live music show
- Ease of doing/ participating — Buy/play a charity-based lottery or raffle ticket
- Convenience — Participating in a virtual athletic activity/ exercise
- Ease of purchasing — Buy/play a charity-based lottery or raffle ticket
- Speed of doing/ participating — Play free games on mobile

OLG ACTIVITIES

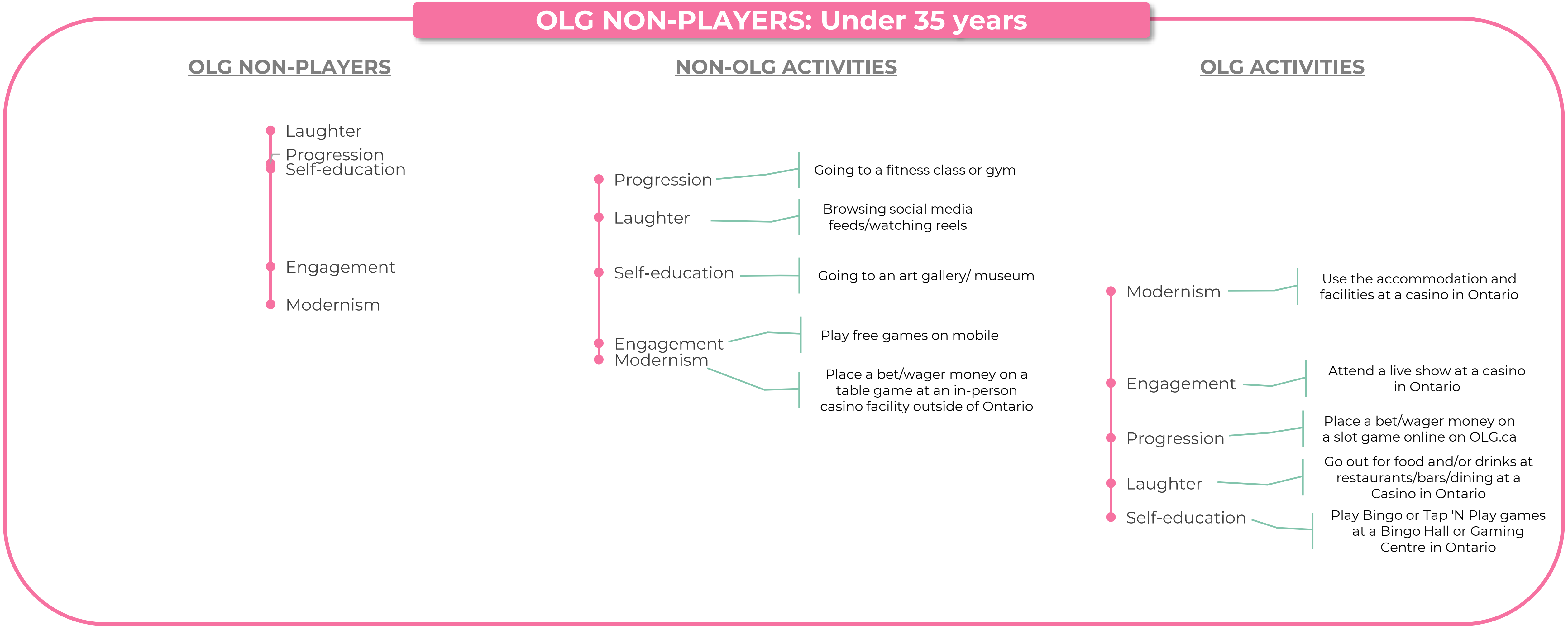
- Ease of doing/ participating — Buy/play a Daily draw-based game at a retail location in Ontario
- Fun — Go out for food and/or drinks at restaurants/bars/dining at a Casino in Ontario
- Ease of purchasing — Buy/play a lottery draw-based game at a retail location
- Convenience — Buy/play a lottery draw-based game online on OLG.ca
- Speed of doing/ participating — Buy/play a Daily draw-based game at a retail location in Ontario

Base: Among those 'not never' in activity at A1 (Base size varies)
A4. You will see a set of statements that describe what people may think are benefits when participating in different activities. Please select up to five statements that are best/most applicable to you when participating in the activity.

The Functional Needs

For the U35 non-player group, current OLG offerings are outperforming competing offerings on modernism. In terms of other functional needs, including ‘laughter’, ‘progression’ and ‘self-education’, opportunities exist to connect OLG’s offerings more to these needs to build relevance and engagement.

OLG NON-PLAYERS: Under 35 years



OLG NON-PLAYERS

- Laughter
- Progression
- Self-education
- Engagement
- Modernism

NON-OLG ACTIVITIES

Progression	Going to a fitness class or gym
Laughter	Browsing social media feeds/watching reels
Self-education	Going to an art gallery/ museum
Engagement	Play free games on mobile
Modernism	Place a bet/wager money on a table game at an in-person casino facility outside of Ontario

OLG ACTIVITIES

Modernism	Use the accommodation and facilities at a casino in Ontario
Engagement	Attend a live show at a casino in Ontario
Progression	Place a bet/wager money on a slot game online on OLG.ca
Laughter	Go out for food and/or drinks at restaurants/bars/dining at a Casino in Ontario
Self-education	Play Bingo or Tap 'N Play games at a Bingo Hall or Gaming Centre in Ontario

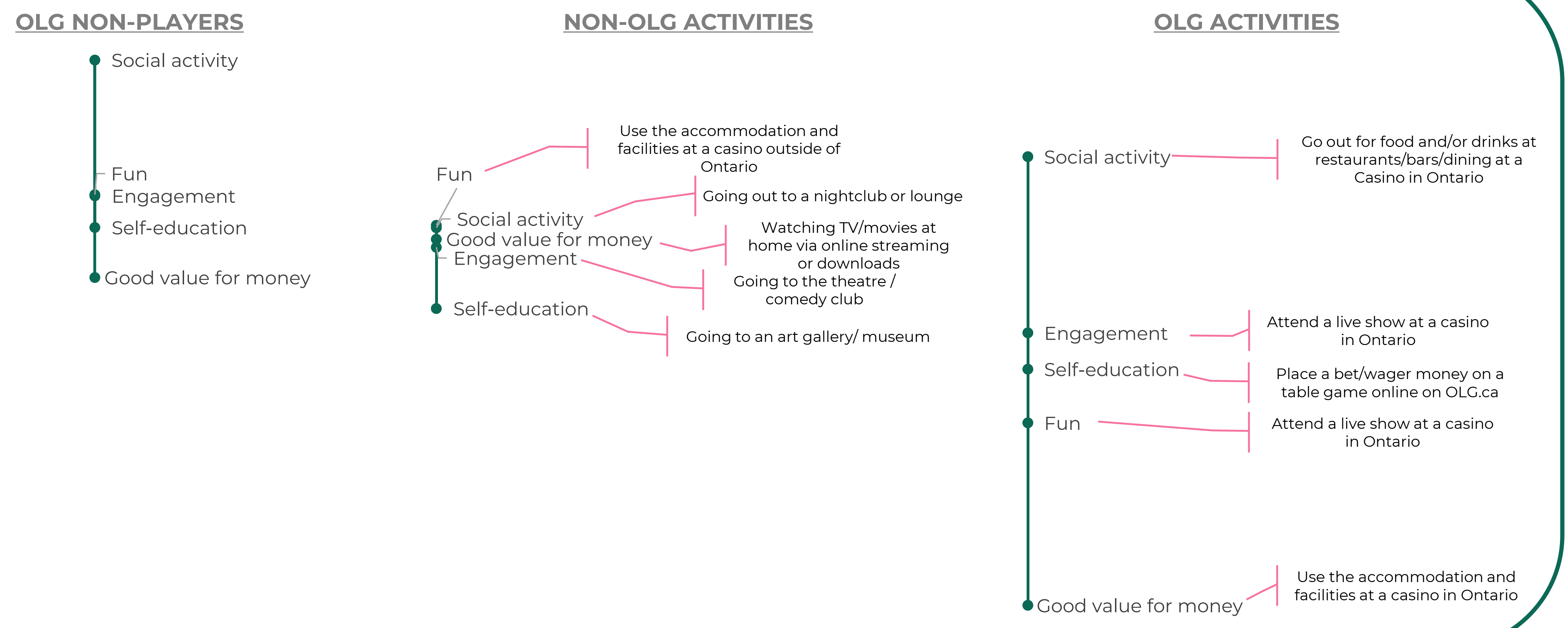
Base: Among those ‘not never’ in activity at A1 (Base size varies)
A4. You will see a set of statements that describe what people may think are benefits when participating in different activities. Please select up to five statements that are best/most applicable to you when participating in the activity.

OLG NON-PLAYERS

The Functional Needs

For the O35 non-player group, a large discrepancy for OLG offerings exists when it comes to “good value for money”, indicating an opportunity for OLG to connect this need to its offerings. On the other hand, for the functional need of ‘social activity’, OLG’s offering is outperforming competing activities.

OLG NON-PLAYERS: 35 years or over



OLG NON-PLAYERS

- Social activity
- Fun
- Engagement
- Self-education
- Good value for money

NON-OLG ACTIVITIES

- Fun – Use the accommodation and facilities at a casino outside of Ontario
- Social activity – Going out to a nightclub or lounge
- Good value for money – Watching TV/movies at home via online streaming or downloads
- Engagement – Going to the theatre / comedy club
- Self-education – Going to an art gallery/ museum

OLG ACTIVITIES

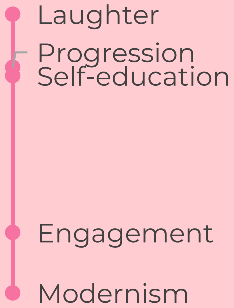
- Social activity – Go out for food and/or drinks at restaurants/bars/dining at a Casino in Ontario
- Engagement – Attend a live show at a casino in Ontario
- Self-education – Place a bet/wager money on a table game online on OLG.ca
- Fun – Attend a live show at a casino in Ontario
- Good value for money – Use the accommodation and facilities at a casino in Ontario

Base: Among those ‘not never’ in activity at A1 (Base size varies)
A4. You will see a set of statements that describe what people may think are benefits when participating in different activities. Please select up to five statements that are best/most applicable to you when participating in the activity.

THE FUNCTIONAL NEEDS – U35

U35 PLAYERS

U35 NON-PLAYERS



Rationally Relevant To U35?

To be relevant on a functional level with the U35 Segment, OLG should take a Non-Player/Player perspective as their needs and magnitude of importance are different.

Rationally we should consider these needs as current and potential functional value propositions of our offerings. Like the emotional side, some of these offerings relate to what we do but also how we deliver. It's going to be important to consider the ideation opportunities around these functional needs ad they do have strong connection to overall choice.

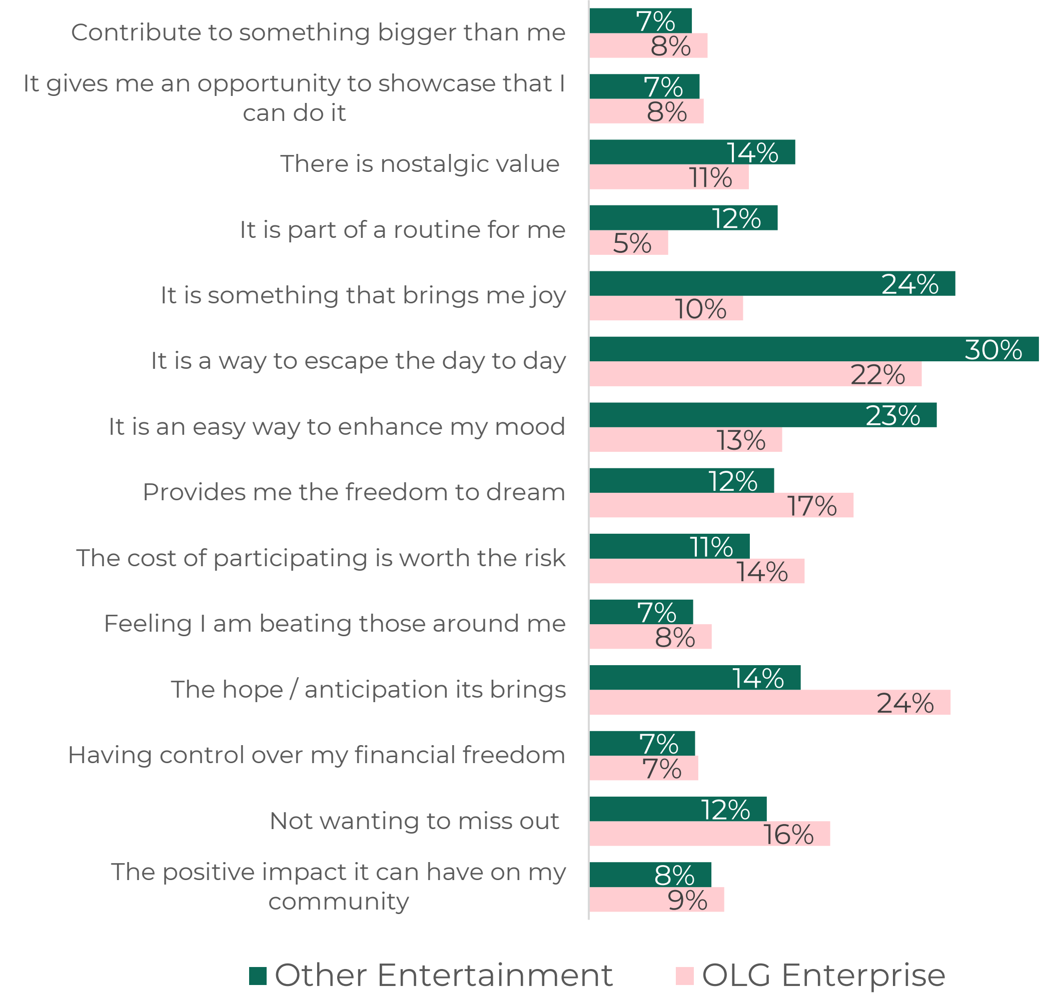
OVERALL & GENERATIONAL PERSPECTIVE

MOTIVATIONS & BARRIERS

The goal of this section is to offer insights into how individuals approach entertainment, with a focus on understanding the 'why' behind their choices from a motivations and barriers perspective.

OLG UNITY INSIGHTS

Motivations



Motivational Insights: Capitalizing on Strengths and Targeting Opportunities

In our analysis of motivations driving engagement with OLG products and other entertainment alternatives, distinct patterns come to light. OLG excels in areas related to hope, anticipation, the freedom to dream, and the fear of missing out (FOMO). These align seamlessly with the core value proposition of the lottery.

On the flip side, we encounter areas where OLG falls behind in comparison to competing entertainment activities. These encompass elements such as joy, escape, mood enhancement, and nostalgic value. While this presents a challenge, it also offers a compelling opportunity for us to refine our approach.

Base: Among those ‘not never’ in activity at A1 (Base size varies)
C1. Here are some reasons that people say encourage them to play/participate in OLG offerings. Please select up to five reasons that describe why you play/participate in OLG offerings.

Barriers

Barriers Insights: Same old story

Regarding barriers, our alignment with consumer perceptions is notable when it comes to restricting factors in choosing alternative entertainment options. However, we do encounter more substantial challenges in areas such as controlling the outcome, chances of winning, and being perceived as subpar value for their money.

While it's encouraging that we don't face a multitude of barriers compared to competitors, it's worth noting that issues related to control, winnability, and perceived value have persistently posed challenges for us over time.

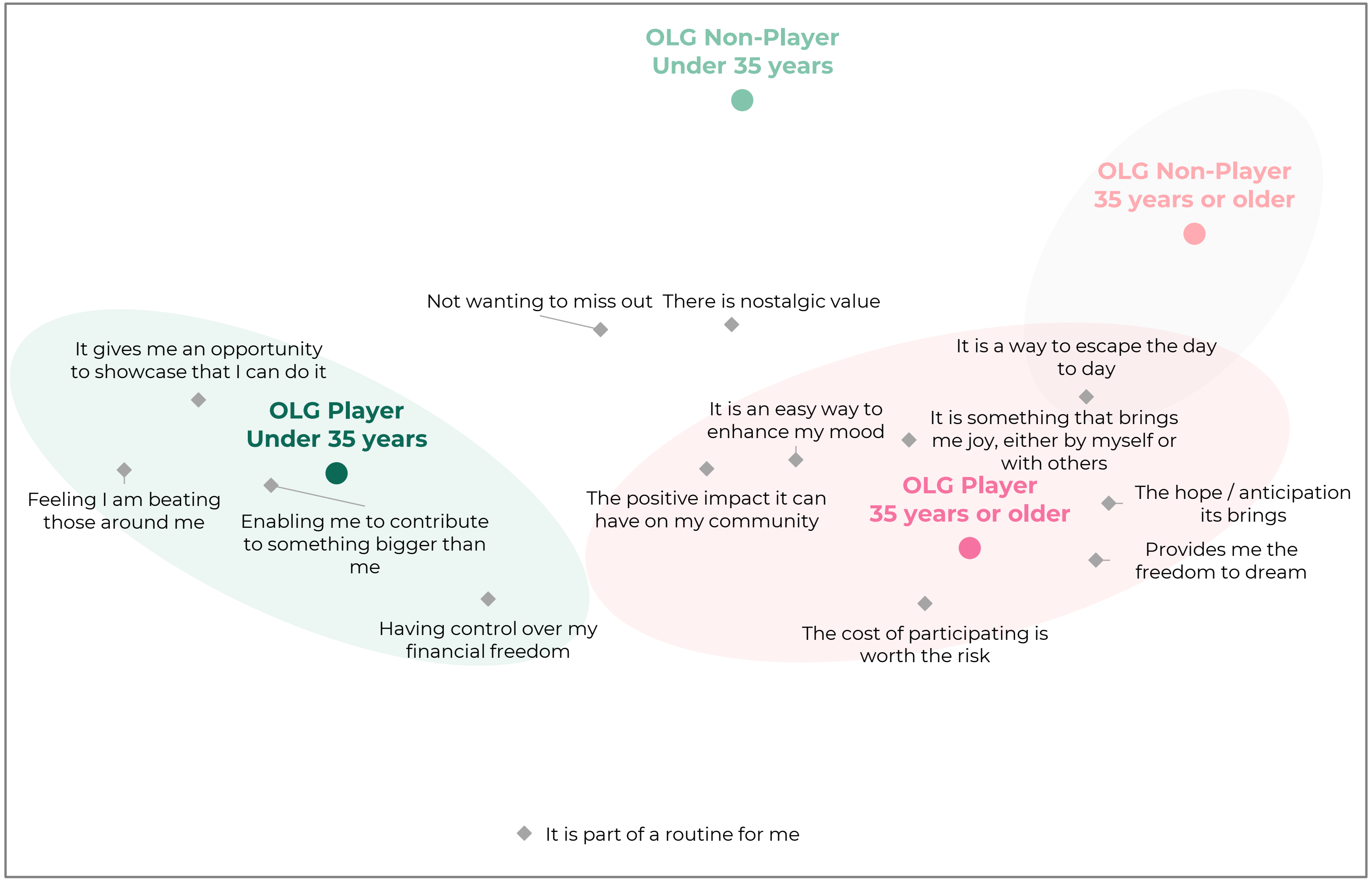
Base: Among those ‘not never’ in activity at A1 (Base size varies)
C2. Here are some reasons that people say hold them back from playing/participating more often in OLG offerings. Please select up to five reasons that inhibit you from playing/participating more often in OLG offerings.

MOTIVATIONS AND BARRIERS– UNDERSTANDING WHAT MATTERS

Similar to the entertainment needs attributes analysis, we used **Correspondence Analysis (CA)** to reveal the relative relationships between motivations and barriers and our subgroups of interest (OLG players U35, OLG non-players U35, OLG players O35, OLG non-players O35). In essence, this allows us to understand which functional needs states attributes ‘matter’ most and also the similarities and differences.

The results from CA are shown on the next few slides with the help of correspondence maps.

Motivations



Correspondence Analysis Total Inertia = 0.039 (First two dimensions explain 95.9% of total inertia)

Age matters in driving motivations

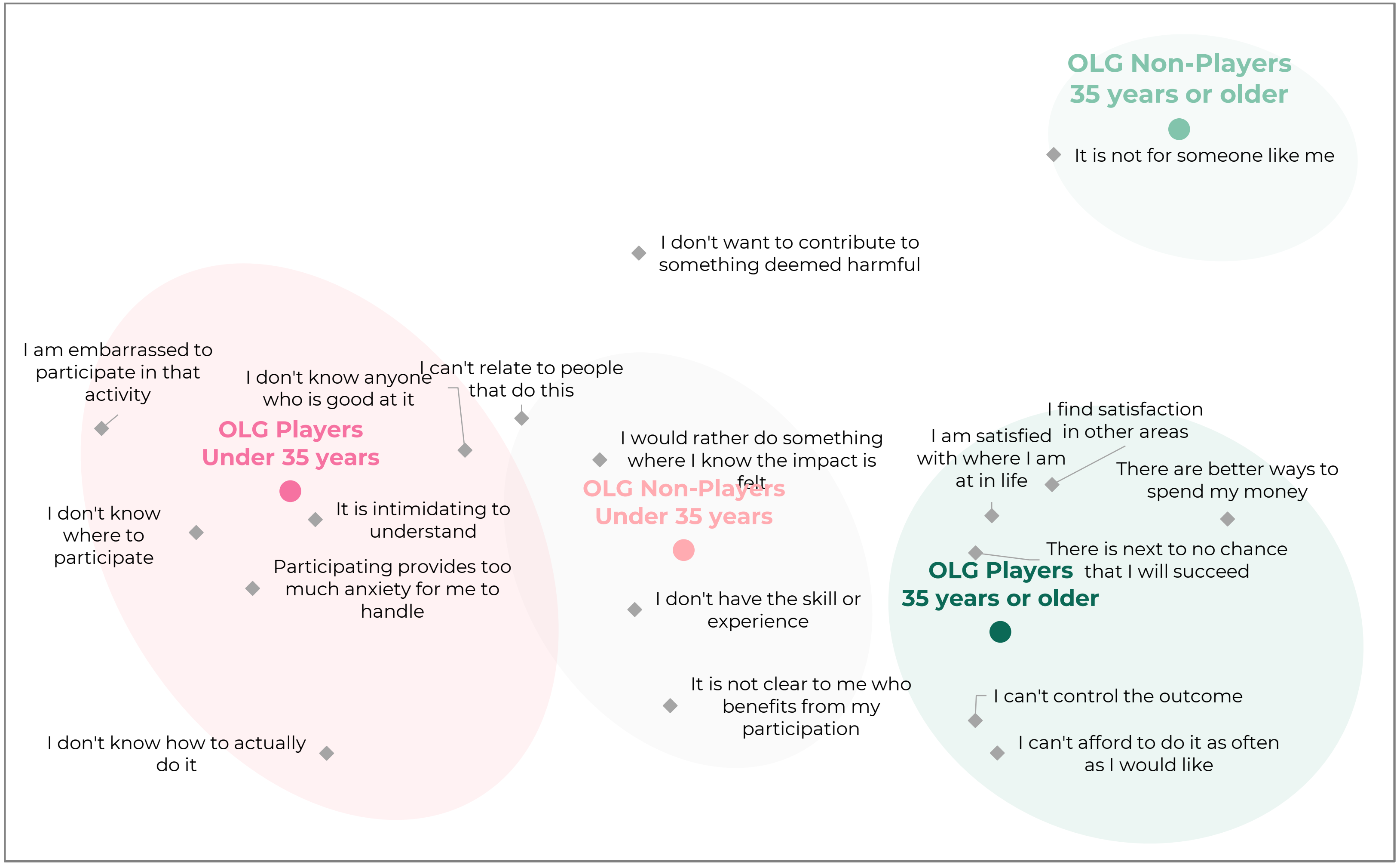
OLG players under 35 are motivated differently than OLG players in the 35 or over age group. Specifically, the younger players display a mix of social (contributing to something bigger and beating others) and individual motivations (financial freedom and showcase that I can do it) while older players seem to motivated mostly by individualistic triggers.

Motivations for the O35 non-players overlap to some extent with motivations for O35 players, indicating that some similarities exist and can be leveraged by OLG to drive engagement.

An U35 non-player strategy should appeal to FOMO and nostalgic value as the key motivation drivers for this consumer group.

Base: Among those ‘not never’ in activity at A1 (Base size varies)
C1. Here are some reasons that people say encourage them to play/participate in OLG offerings. Please select up to five reasons that describe why you play/participate in OLG offerings.

Barriers



Correspondence Analysis Total Inertia = 0.053 (First two dimensions explain 99.0% of total inertia)

Distinct barriers to overcome

Interestingly, from a barriers' perspective, players and non-players for both the younger (U35) and older (O35) group are unique.

This suggests that OLG may need to consider a differentiated approach to overcome barriers for each consumer group to drive relevance and engagement.

Base: Among those 'not never' in activity at A1 (Base size varies)
C2. Here are some reasons that people say hold them back from playing/participating more often in OLG offerings. Please select up to five reasons that inhibit you from playing/participating more often in OLG offerings.

OLG Motivations and Barriers U35

Motivations for the U35 Players: . Specifically, this segment is motivated by two dimensions social and individualistic. On the social side it focuses both on the impact of the win (contributing to something bigger) and Competition (beating others). From an individual perspective younger players are looking for financial freedom and the ability to swag out (showcase).

Motivations for the U35 Non-Players: the observation here, is that outside of FOMO and nostalgic value these players don't have a lot of motivations to work with. To this perhaps a way to engage participation would be addressing their barriers.

Barriers for the U35 Non- Players: The barriers for these non-players center on the lack of knowledge around the impact.   As we had discussed in the qual, its not about where the money goes both rather who the money impacts.   This is a key opportunity for OLG to take advantage of by shifting the narrative. The other barrier is a perceived lack of skill/ experience required to play an OLG offering. This can be solved in a variety of creative ways including educational initiatives and more trial/demo play.

Barriers for the U35 Players: Everything around the barriers for these players center on needing more information of how the games work and how to play.   Specifically, it's the feeling the are intimidated/embarrassed, which is going to be a big hurdle we will need to overcome to ensure retention and growth of these players.

APPENDIX

Generational Breakdown + Profiles

Demographic Profile

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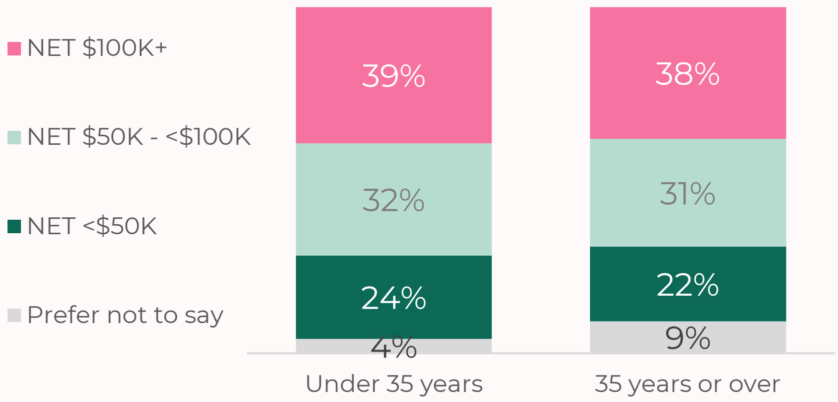
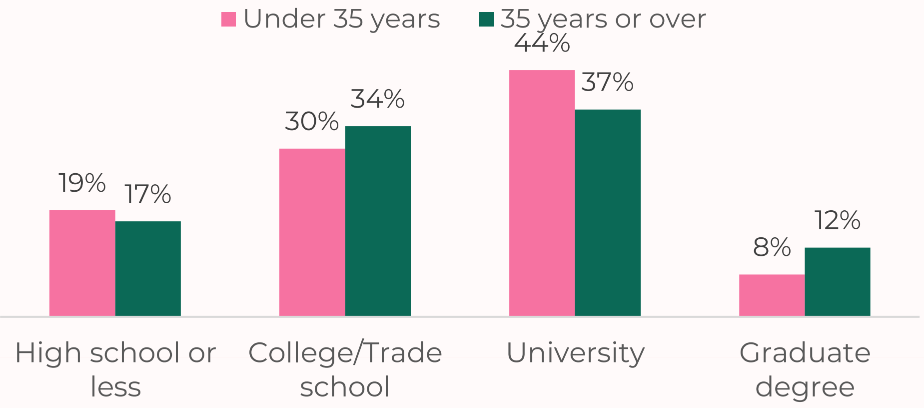
OLG Players by Age

INCOME



50% / 50% Male/Female	Under 35 years
51% / 49% Male/Female	35 years or over

EDUCATION



People in Household

	Under 35 years	35 years or over
Live alone	**11%**	**20%**
Two people	**23%**	**42%**
Three people	**34%**	**19%**
Four people	**21%**	**13%**
Five or more	**10%**	**6%**

Kids in Household % Yes

40%	Under 35 years
24%	35 years or over

Marital Status

	Under 35 years	35 years or over
Married/ Common-law	**44%**	**66%**
Single, never married	**53%**	**18%**
Separated/ Divorced	**2%**	**12%**
Widowed	**0%**	**4%**

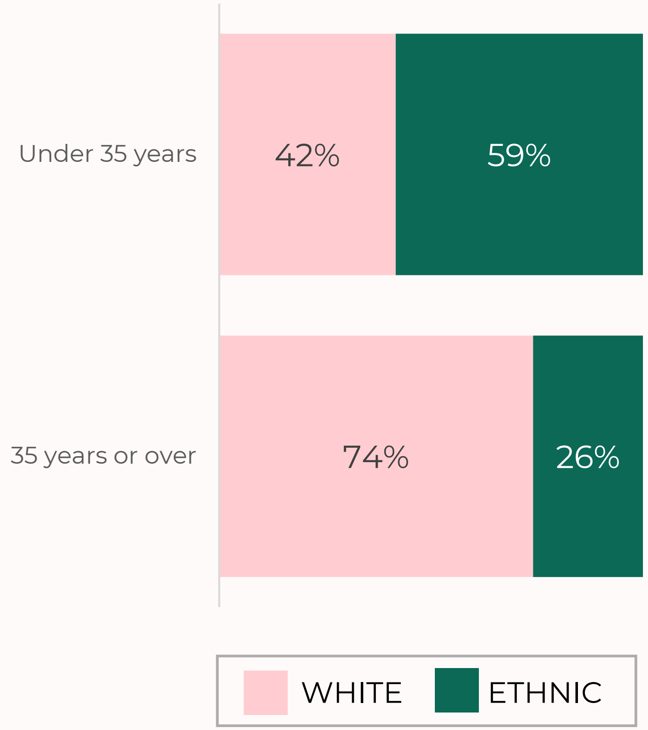
Base: OLG Players (n=3,850)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile

XXXXX

OLG Players by Age

ETHNIC BACKGROUND



- White (42%)
- Indigenous (24%)
- South Asian (9%)
- Black (9%)
- Other (18%)

- White (74%)
- Chinese (6%)
- Indigenous (4%)
- South Asian (4%)
- Other (13%)

VISIBLE MINORITY % Yes

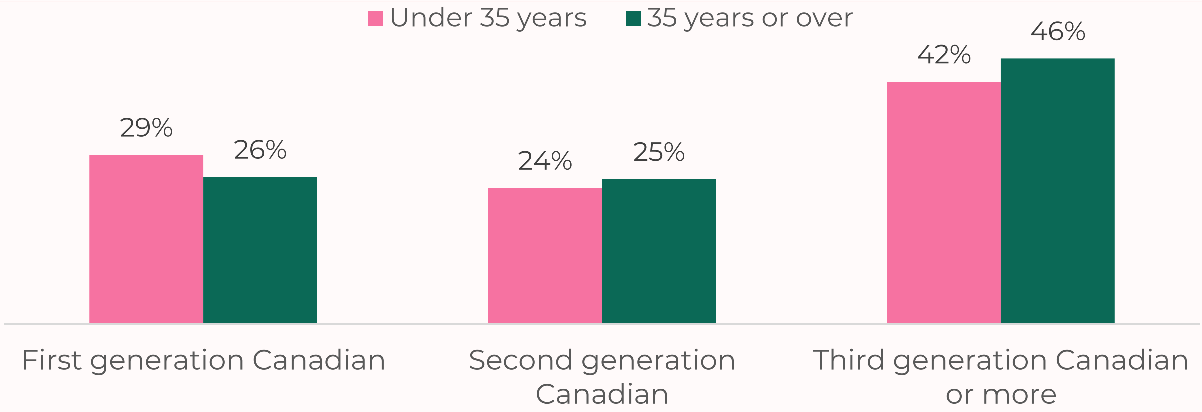
42% Under 35 years

20% 35 years or over

Born in Canada % Yes

82% Under 35 years

77% 35 years or over



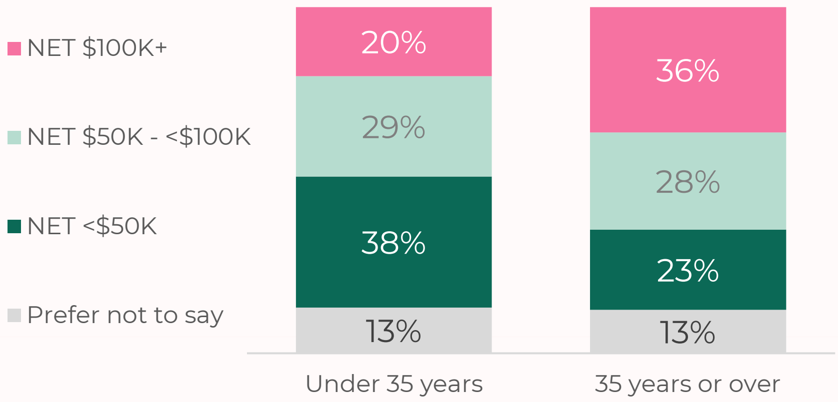
Base: OLG Players (n=3,850)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

Demographic Profile

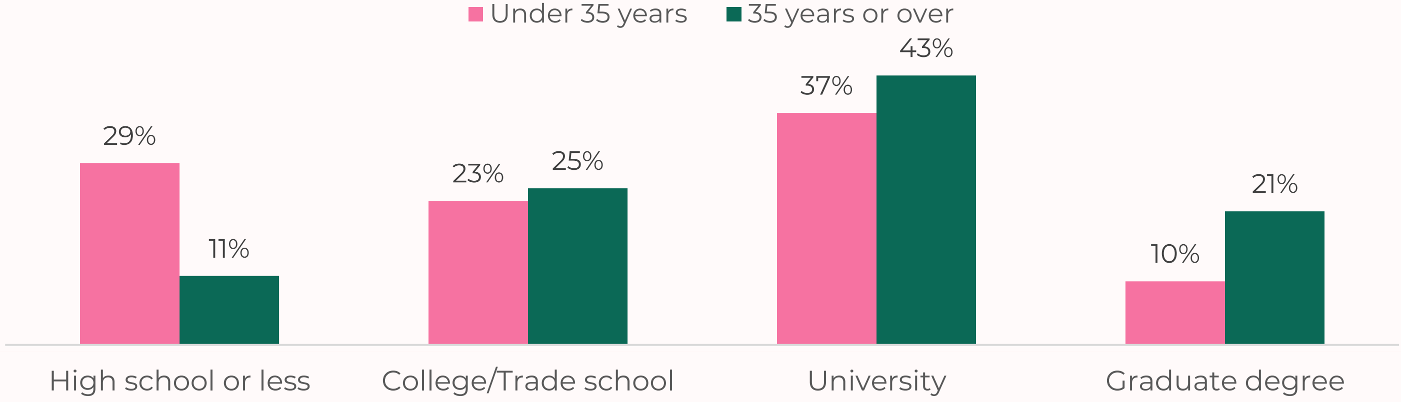
XXXXX

OLG Non-Players by Age

INCOME



EDUCATION



People in Household

	Under 35 years	35 years or over
Live alone	13%	27%
Two people	24%	37%
Three people	24%	15%
Four people	21%	15%
Five or more	18%	7%

Kids in Household
% Yes

31%	Under 35 years
23%	35 years or over

Marital Status

	Under 35 years	35 years or over
Married/ Common-law	29%	62%
Single, never married	70%	25%
Separated/ Divorced	1%	9%
Widowed	0%	4%

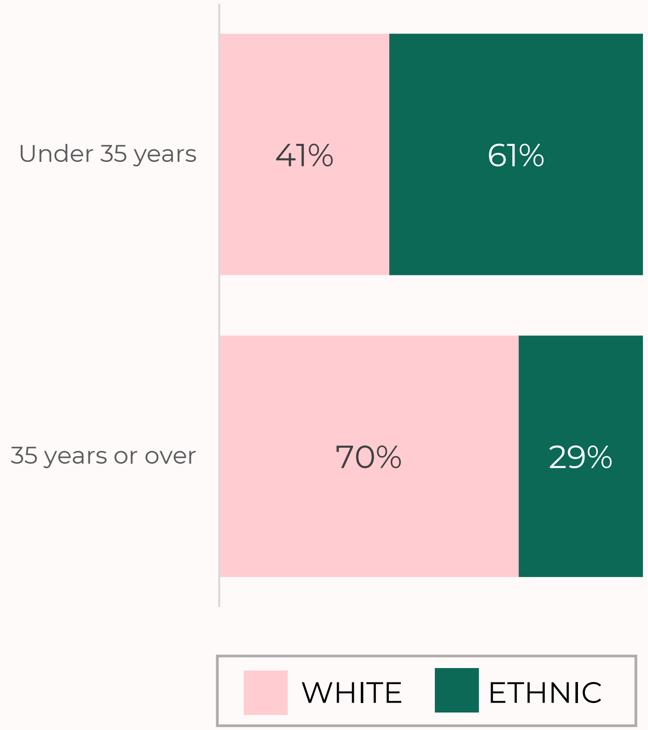
Base: OLG Non-Players (n=1,311)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile

XXXXX

OLG Non-Players by Age

ETHNIC BACKGROUND



- White (41%)
- South Asian (16%)
- Black (14%)
- Chinese (8%)
- Indigenous (7%)
- Other (19%)

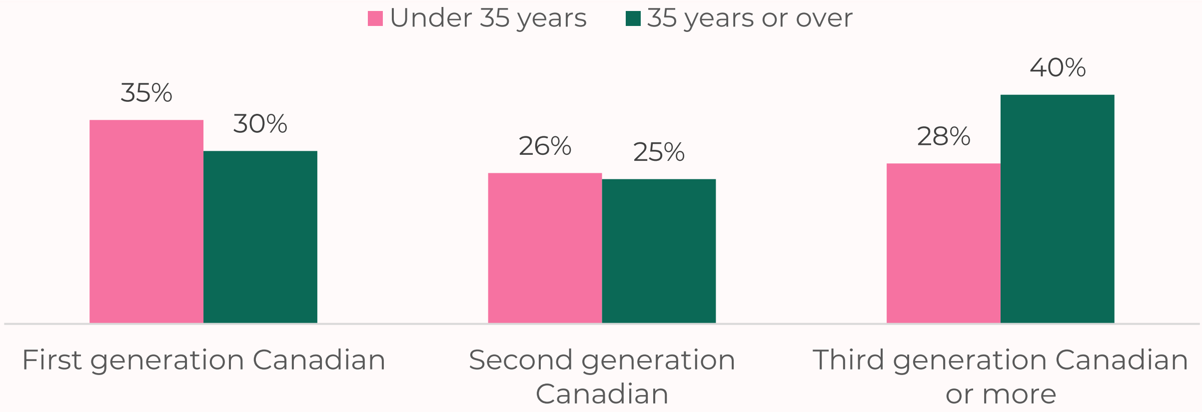
- White (70%)
- Chinese (12%)
- Black (4%)
- South Asian (4%)
- Other (10%)

VISIBLE MINORITY
% Yes

43%	Under 35 years
24%	35 years or over

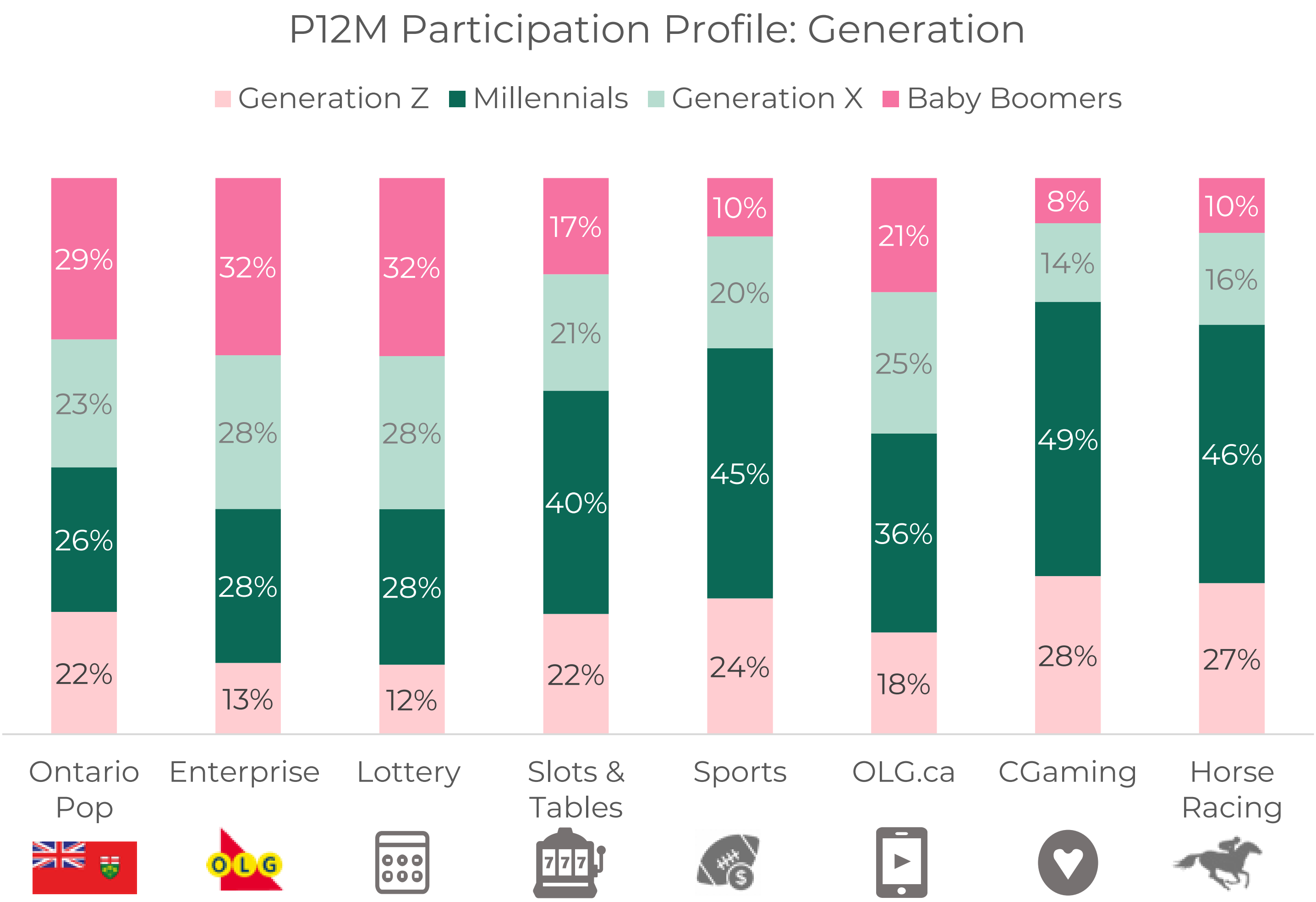
Born in Canada
% Yes

63%	Under 35 years
71%	35 years or over



Base: OLG Non-Players (n=1,311)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

OLG Past 12 Month Player Profile by Generation

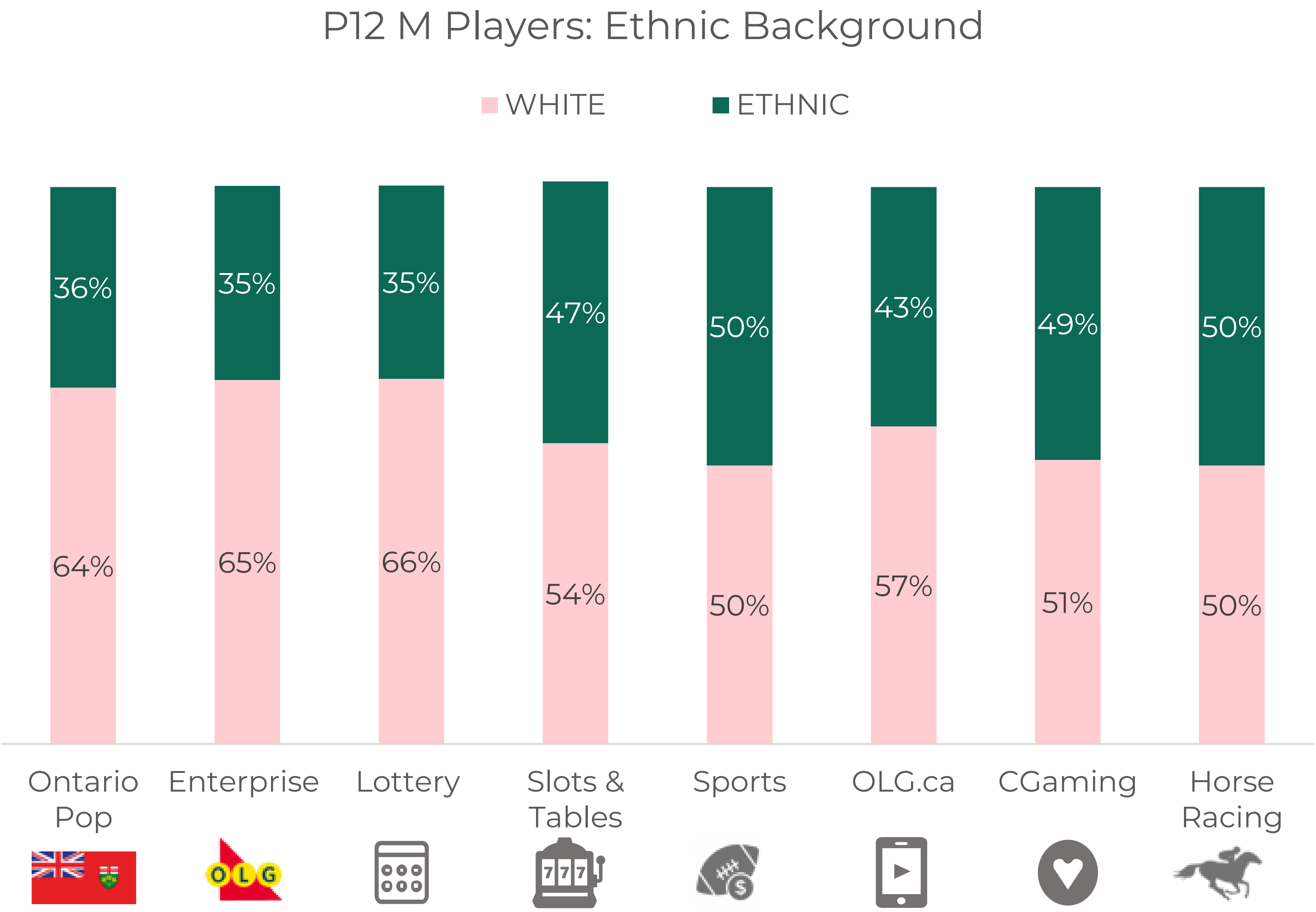


Realigning OLG's Demographic Focus: Generation Z takes center stage for acquisition for lottery.

Analyzing participation based on generational categories unveils a different viewpoint than our initial assumptions. OLG must concentrate on captivating the younger demographic for customer acquisition, with a focus not on Millennials but rather Generation Z. This perspective underscores the necessity to cultivate the Millennial market we presently possess across all LOBs, while also strategizing how to engage the older demographics for Slots & Tables, OLG.ca, Sports, & CGaming. While this divergence from our initial hypothesis may seem surprising, Unity believes it could offer greater clarity for each LOB/Product and the enterprise holistically.

Base: All Respondent (n= 5,161)
A1 - When was the last time you participated in each of the following activities?

OLG Past 12 Month Player Profile by Ethnicity



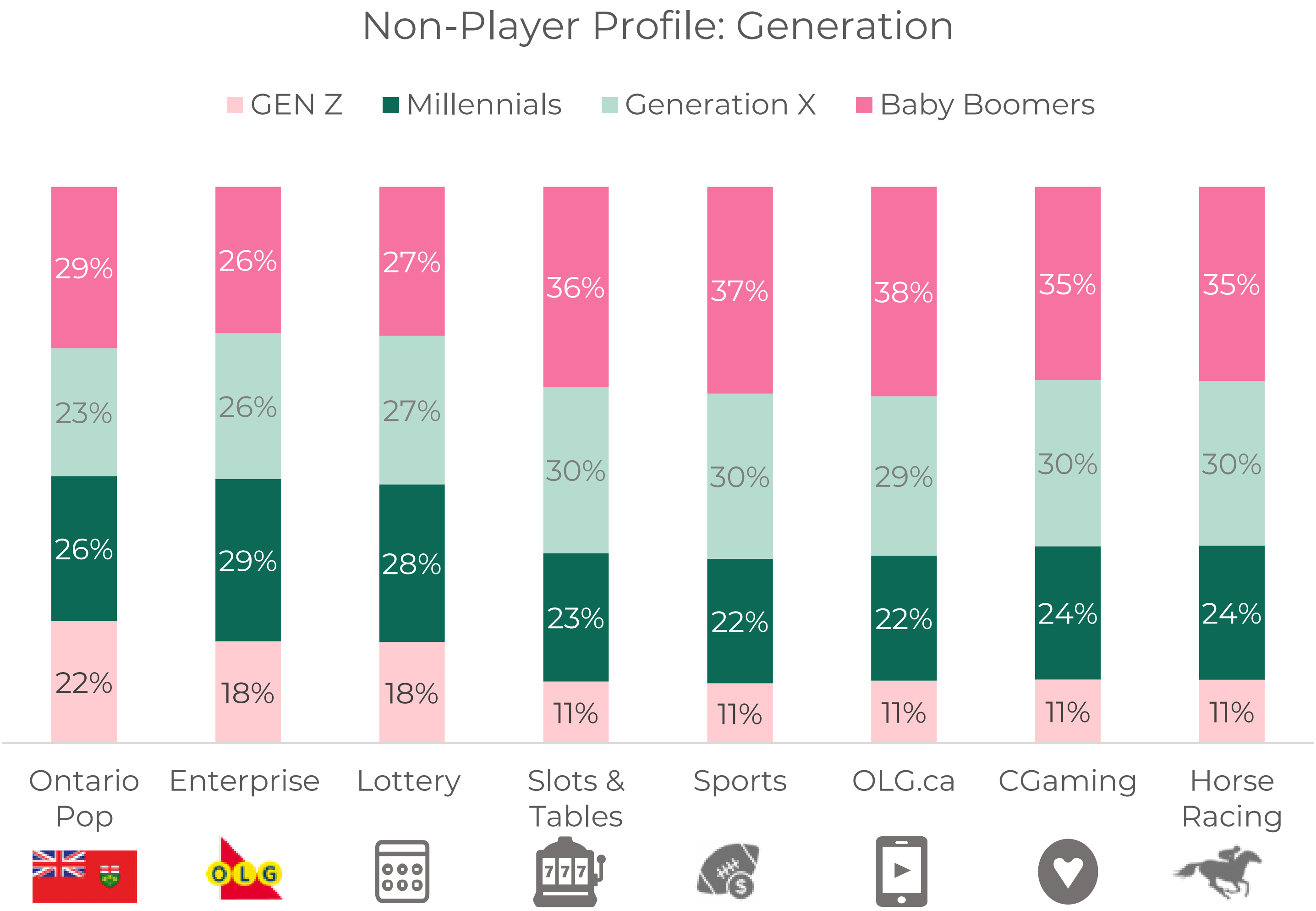
Diversity Disparities: Need for Culturally Relevant Strategies in Retention and Acquisition Efforts.

From an ethnic background standpoint, OLG players broadly align with the demographics of the Ontario Adult Population. However, this alignment doesn't hold uniformly across all Lines of Business (LOBs)/Products. Notably, Lottery exhibits a comparatively lower level of ethnic diversity compared to other areas like Horse Racing and Sports. This disparity bears significance in the context of our ongoing retention and growth initiatives.

As we formulate strategies for marketing, product development, and distribution, it's imperative to take this diversity into account. Ensuring cultural relevance for our existing customers could serve as the authentic foundation necessary to capitalize on acquisition opportunities.

Base: All Respondent (n= 5,161)
X3. What is your own ethnic or racial background? Are you…?

OLG Non-Player Profile by Generation



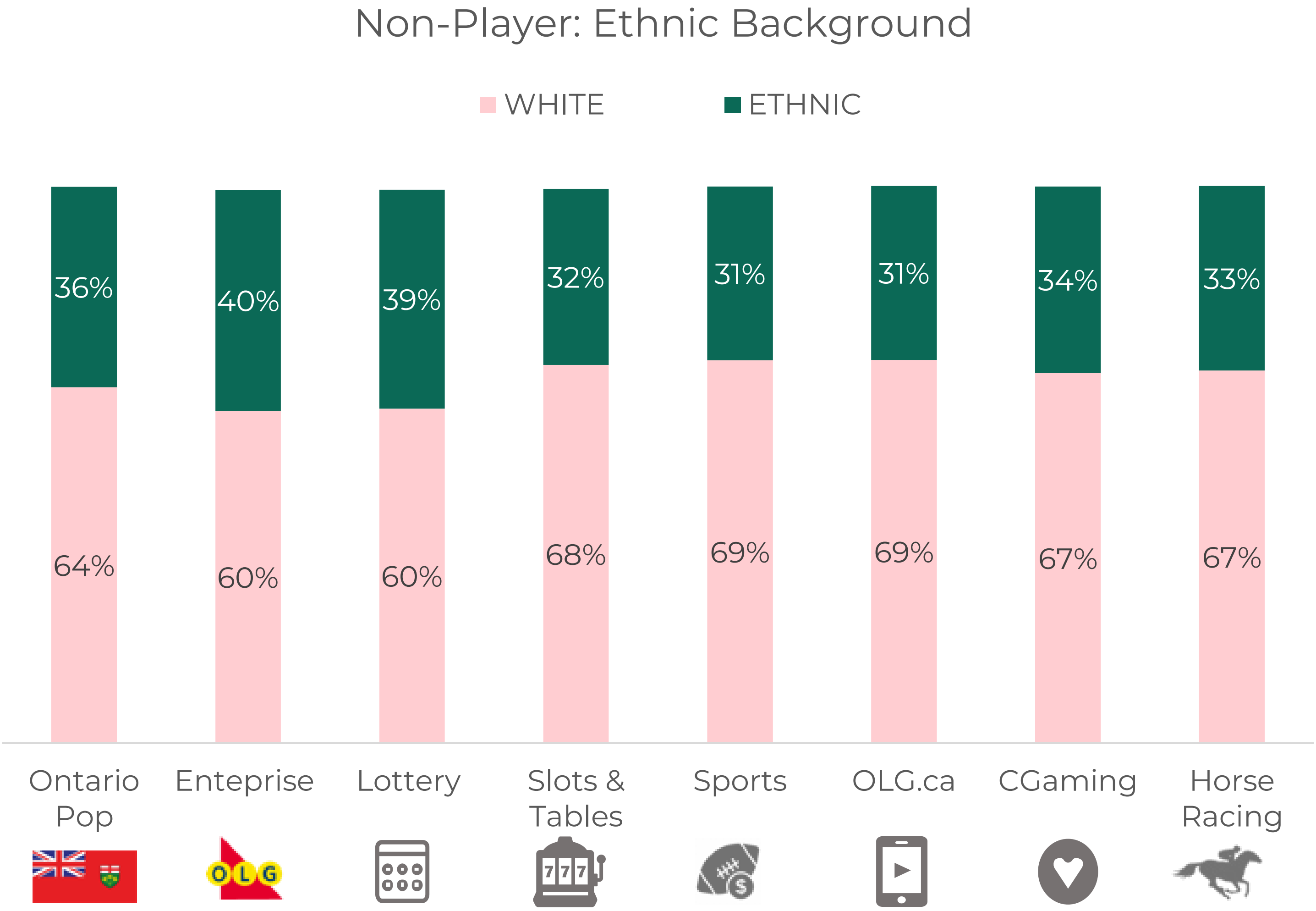
Strategic Clarity in Player Acquisition: Balancing Gen Z Potential with a Multi-Generational Opportunity

When it comes to acquisition, we must establish a clear objective. Are we aiming for immediate player growth, regardless of generation, or do we seek a deliberate strategy focused on attracting younger players for future sustainability? Regardless of the path chosen, it's crucial to define and align our growth expectations.

Considering the relatively smaller size of the Gen Z market, we need to articulate what we intend to accomplish by engaging this demographic. Is revenue generation our ultimate goal? While this is a valid pursuit, we must be cautious not to lose sight of the opportunities that exist among other generations across all Lines of Business (LOBs)/Products. A balanced approach that considers all demographics may prove to be the most advantageous.

Base: Not participated in OLG activity in past 12 months (Base size varies)
A1 - When was the last time you participated in each of the following activities?

OLG Non-Player Profile: Ethnicity



	Ontario Pop	Enteprise	Lottery	Slots & Tables	Sports	OLG.ca	CGaming	Horse Racing
ETHNIC	36%	40%	39%	32%	31%	31%	34%	33%
WHITE	64%	60%	60%	68%	69%	69%	67%	67%

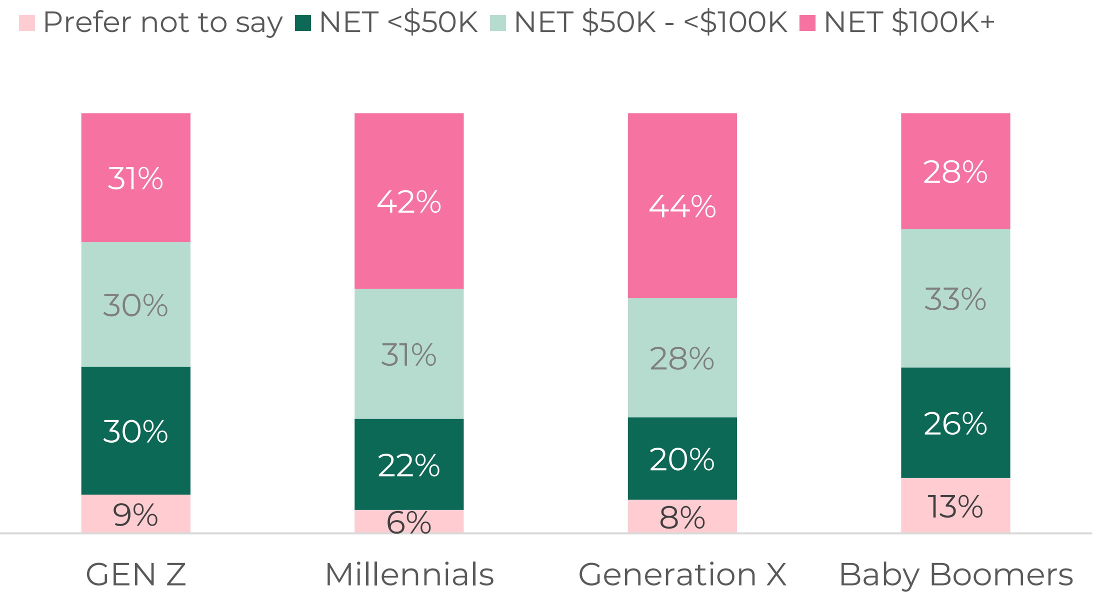
Prioritizing Cultural Relevance in OLG's Acquisition Strategy, Starting with Our Current Player Base.

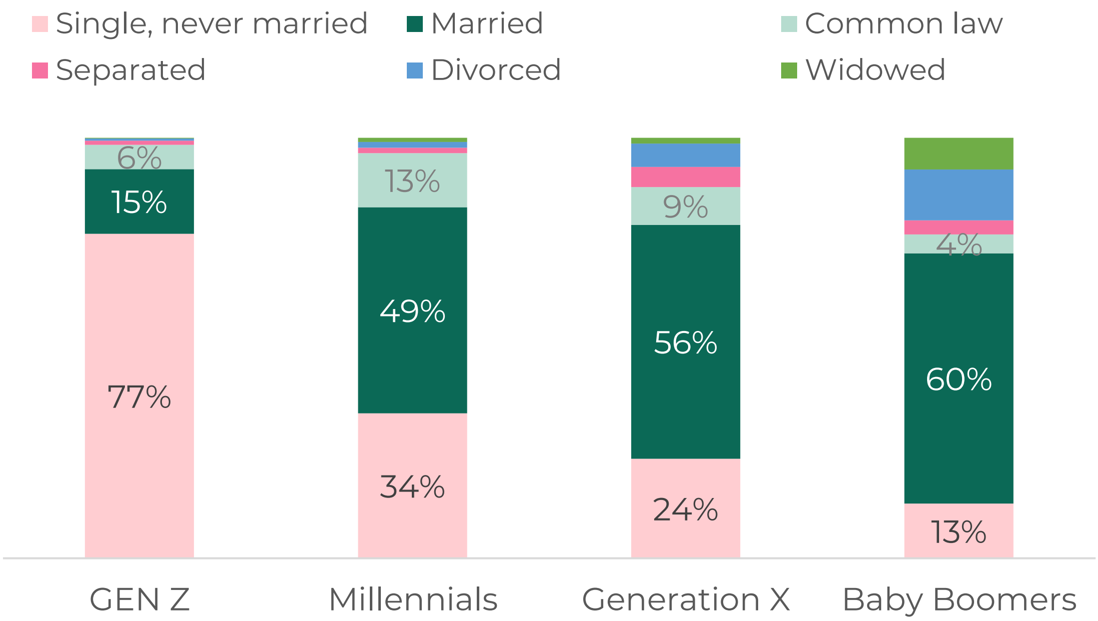
When considering non-engaging players, a noticeable trend emerges: they tend to represent a more ethnically diverse demographic compared to the general population distribution. Although this discrepancy is largely driven by the less diverse nature of the Lottery category, it underscores the vital importance of cultural relevance, particularly within the Lottery sector, from an acquisition perspective. However, as previously discussed, instead of immediately delving into multicultural-focused acquisition tactics, it may prove advantageous to initially establish a cultural connection with our existing player base. This approach allows us to learn, maintain authenticity, and address this critically scrutinized aspect effectively. Exploring culturally tailored player appreciation experiences stands out as one potential avenue worth exploring.

Base: All Respondent (n= 5,161)
X3. What is your own ethnic or racial background? Are you…?

Income & Marital Status

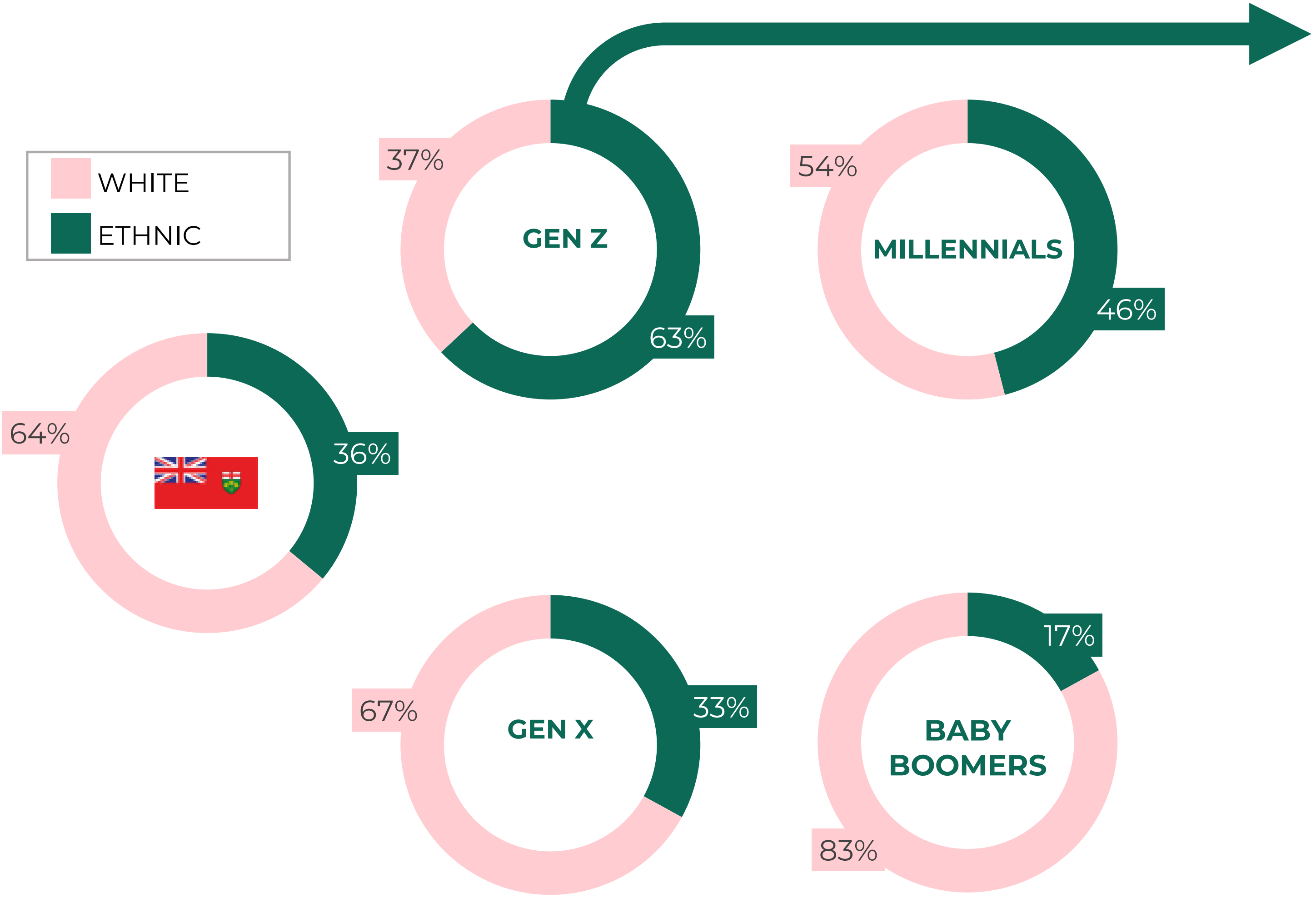
From an income perspective, it's evident that Gen Z has the lowest income, followed by Baby Boomers. Gen X and Millennials represent the most affluent segments in terms of income. When evaluating opportunity segments, these income levels should be taken into consideration. Additionally, it's noteworthy that Gen Z has a significantly higher percentage of individuals in the single status category, reflecting a highly individualized dynamic in this generation.



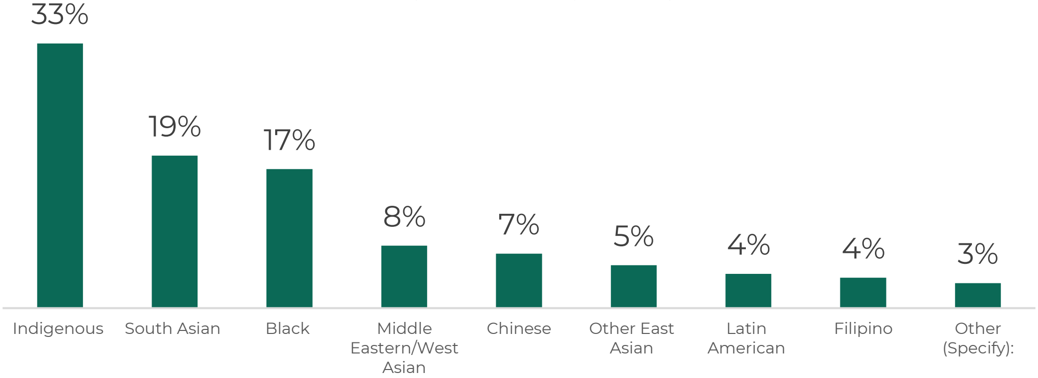


Base: All respondents (n=5,161)
X2. Which of the following ranges best describes your total annual household income before taxes for 2021? X7. What is your current marital status?

Ethnic Background by Generation



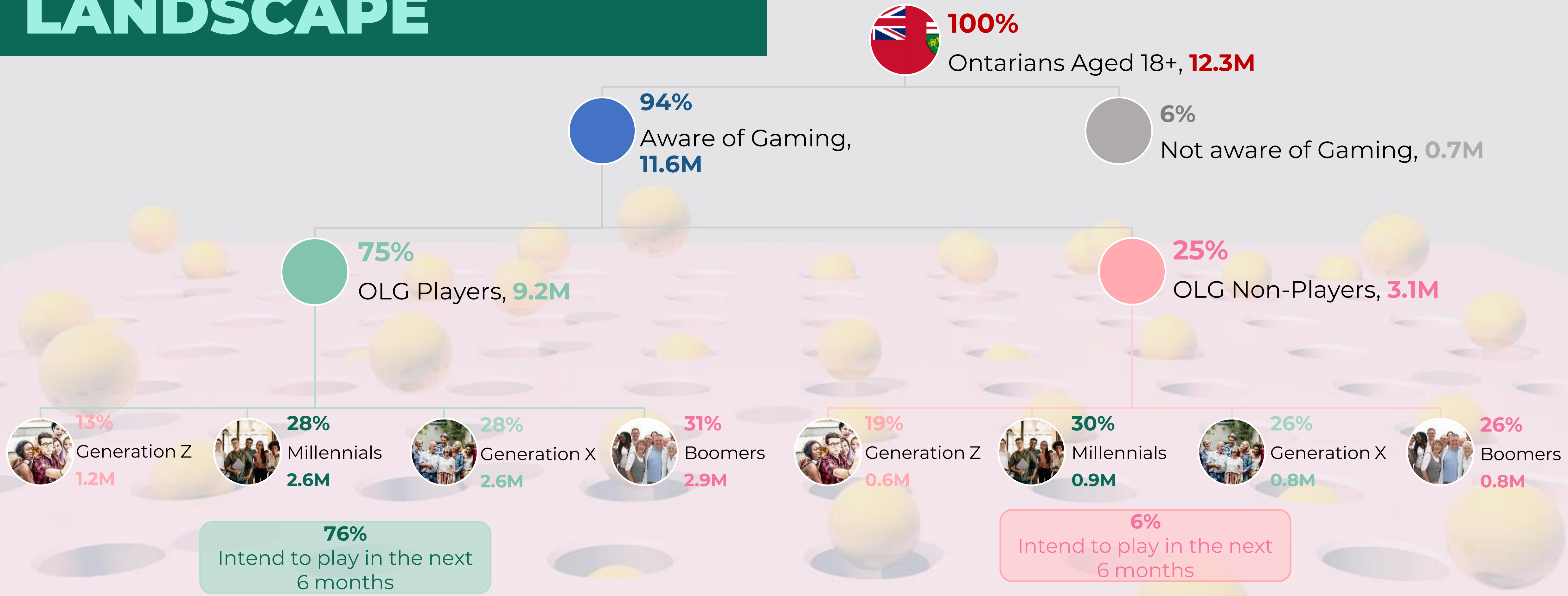
ETHNIC BREAKDOWN: GEN Z



When looking at generations by ethnicity, it is evident that Gen Z is remarkably the most diverse generation we've ever encountered. Top ethnicities provided include Indigenous, South Asian & Black. This diversity should be a crucial factor in our approach to targeting this group. However, it is important to note that Gen Z may exhibit a high degree of skepticism due to perceived stereotypes related to their culture. Following Gen Z, the Millennial segment is the next most diverse, surpassing the provincial average of ethnic Ontarians.

Base: All respondents (n=5,161)
X3. What is your own ethnic or racial background? Are you...?

ONTARIO GAMING LANDSCAPE



100%
Ontarians Aged 18+, **12.3M**

94%
Aware of Gaming, **11.6M**

6%
Not aware of Gaming, **0.7M**

75%
OLG Players, **9.2M**

- **13%** Generation Z **1.2M**
- **28%** Millennials **2.6M**
- **28%** Generation X **2.6M**
- **31%** Boomers **2.9M**

76%
Intend to play in the next 6 months

25%
OLG Non-Players, **3.1M**

- **19%** Generation Z **0.6M**
- **30%** Millennials **0.9M**
- **26%** Generation X **0.8M**
- **26%** Boomers **0.8M**

6%
Intend to play in the next 6 months

GENERATIONAL PERSPECTIVE

VALUES & PROFILE

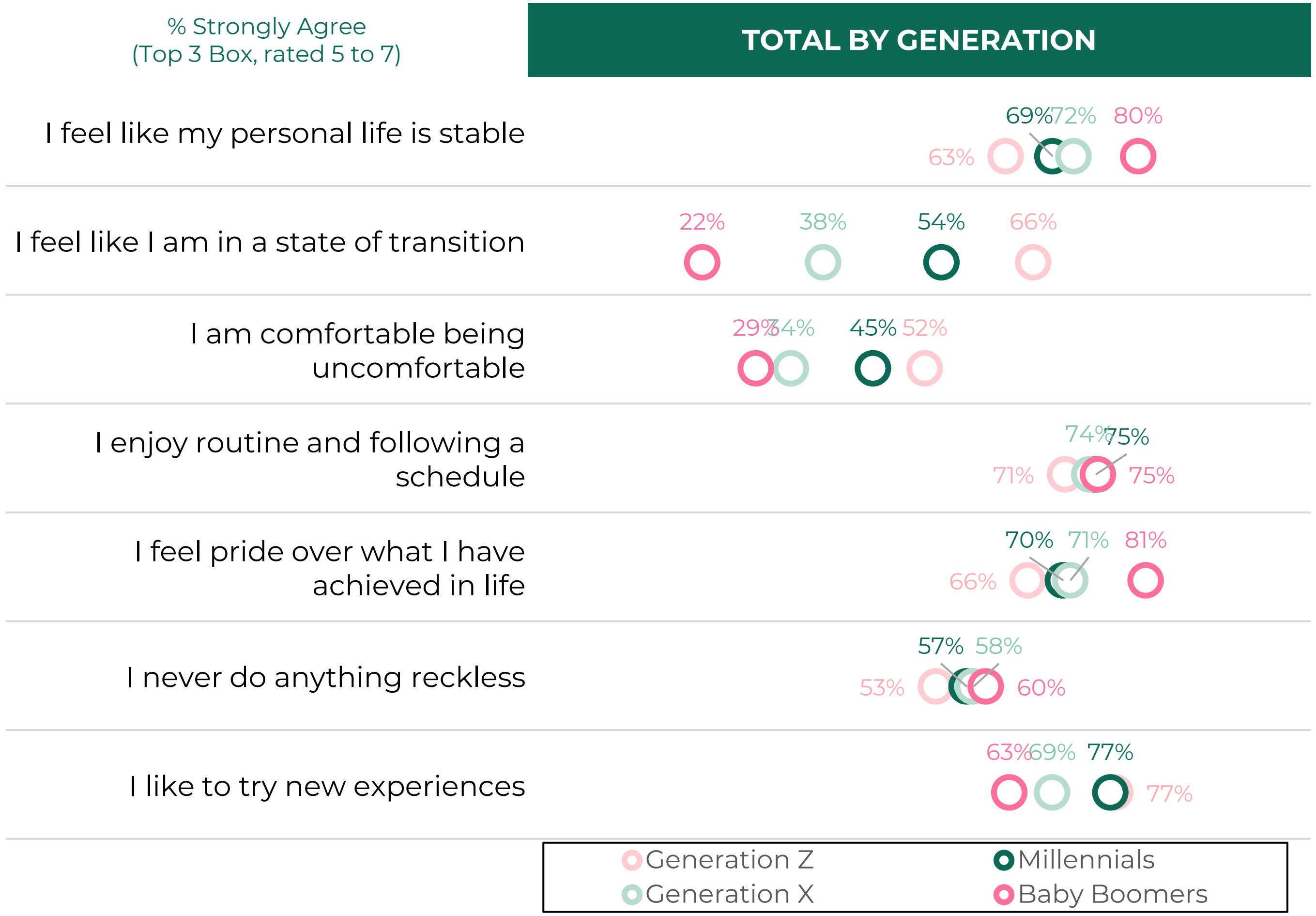
This section identifies the values, attitudes, and other characteristics of each generational sub-group, highlighting differences between the player and non-player segment .

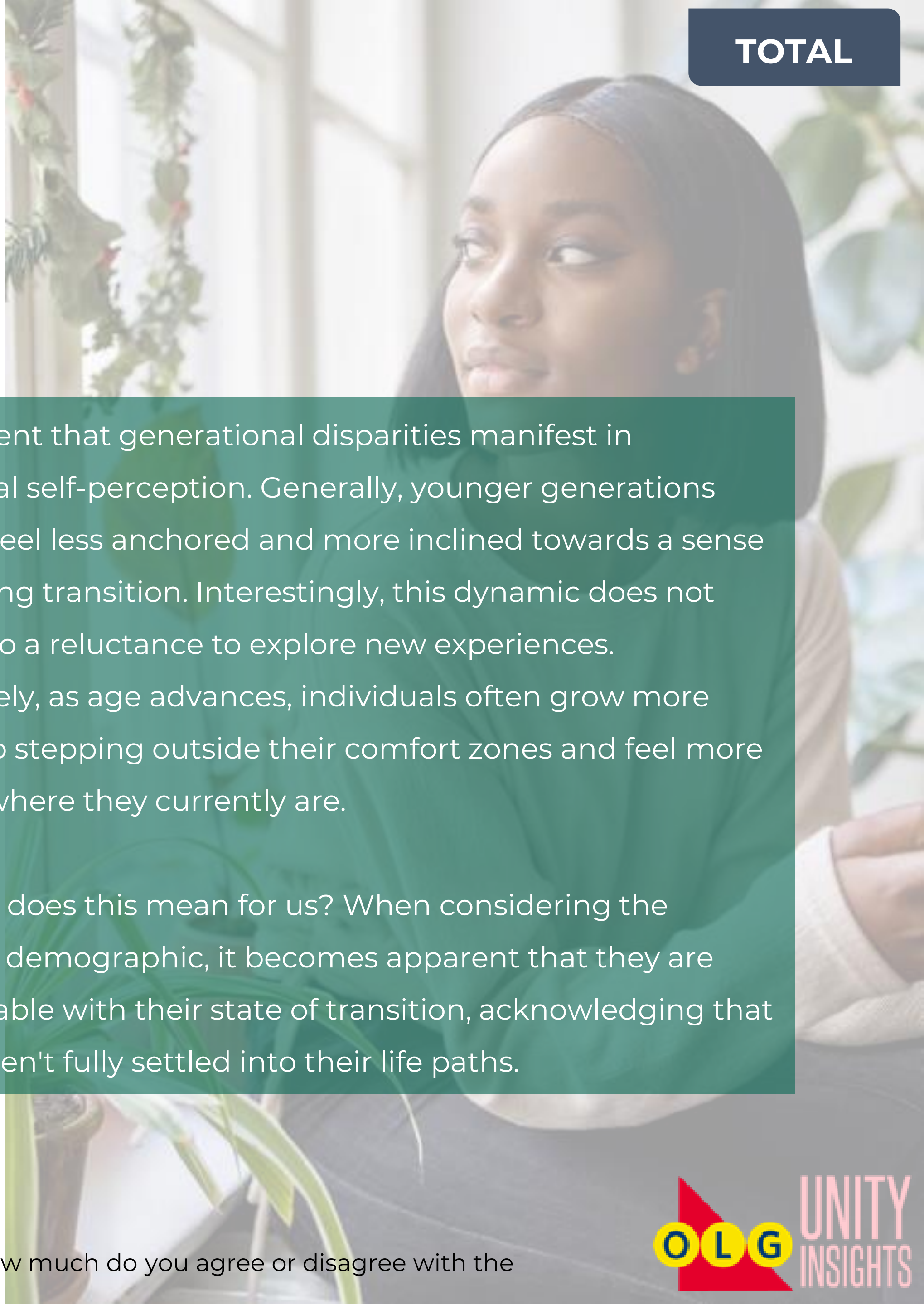
OLG UNITY INSIGHTS

Self Perception

TOTAL

Generational Differences in Self-Perception: Embracing Transition and Comfort





It is evident that generational disparities manifest in individual self-perception. Generally, younger generations tend to feel less anchored and more inclined towards a sense of ongoing transition. Interestingly, this dynamic does not equate to a reluctance to explore new experiences. Conversely, as age advances, individuals often grow more averse to stepping outside their comfort zones and feel more settled where they currently are.

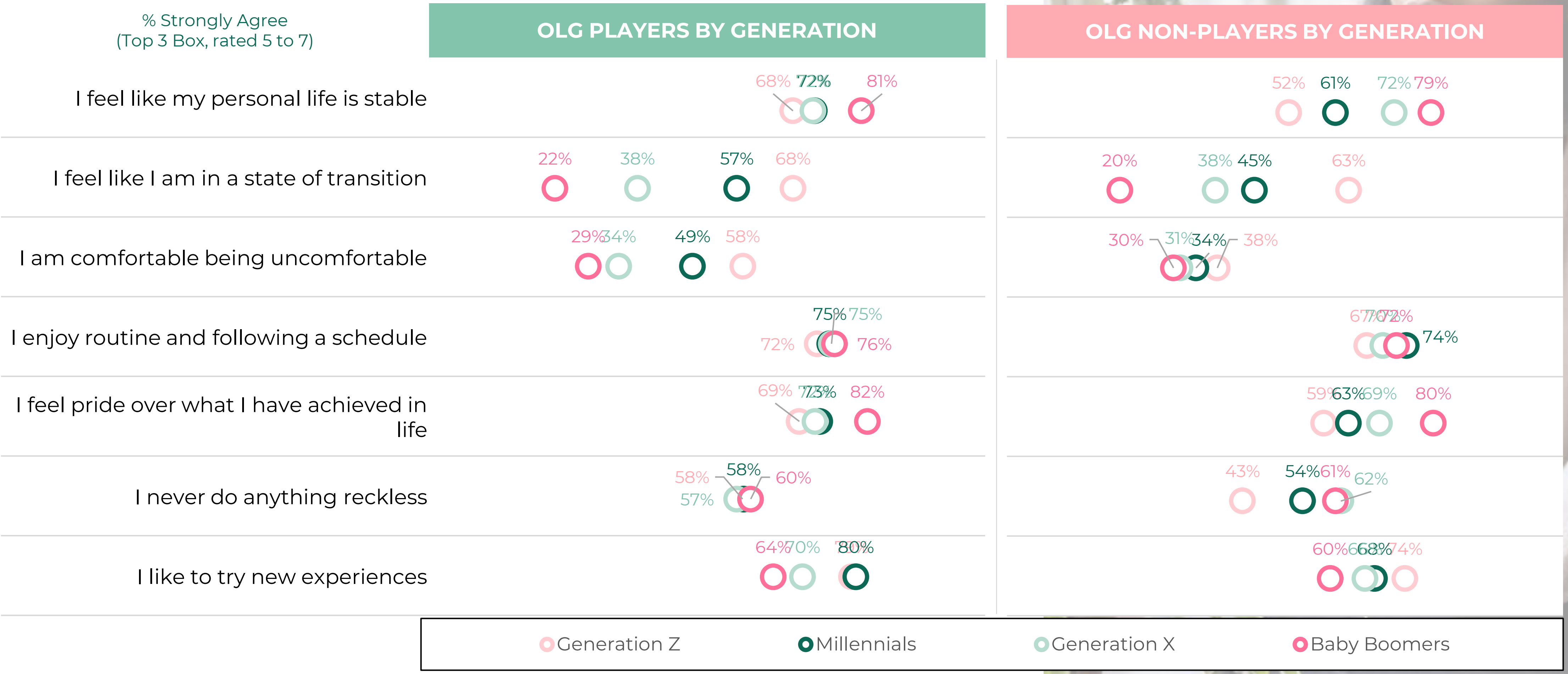
So, what does this mean for us? When considering the younger demographic, it becomes apparent that they are comfortable with their state of transition, acknowledging that they haven't fully settled into their life paths.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Self Perception

OLG PLAYERS V. NON-PLAYERS

The younger cohort, and particularly Gen Z, tends to feel less anchored and more inclined towards transition, open to new experiences and being comfortable with being uncomfortable. Conversely, the older generations, and particularly Baby Boomers, have grown more averse to stepping outside their comfort zones and feel more settled where they currently are.



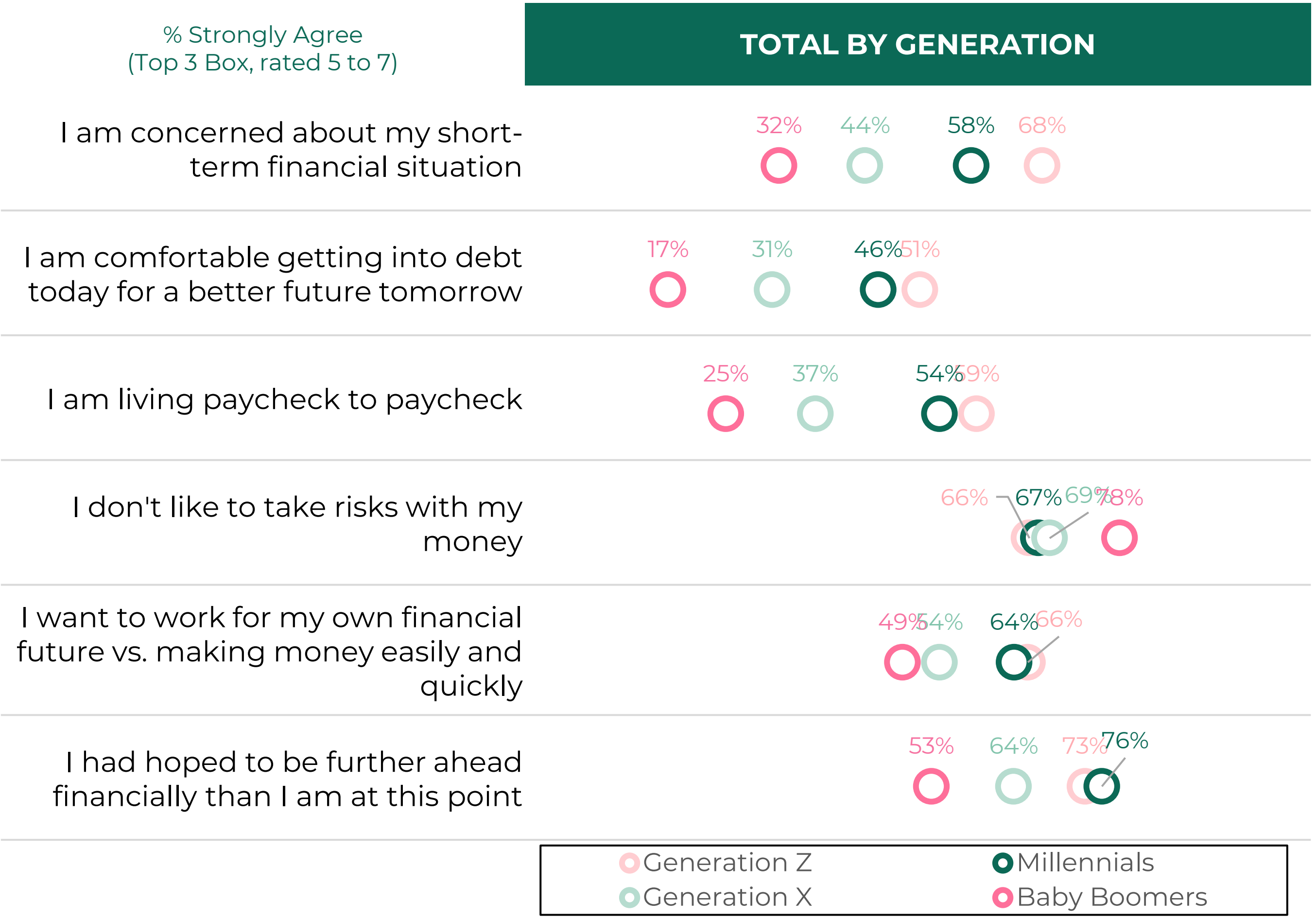
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

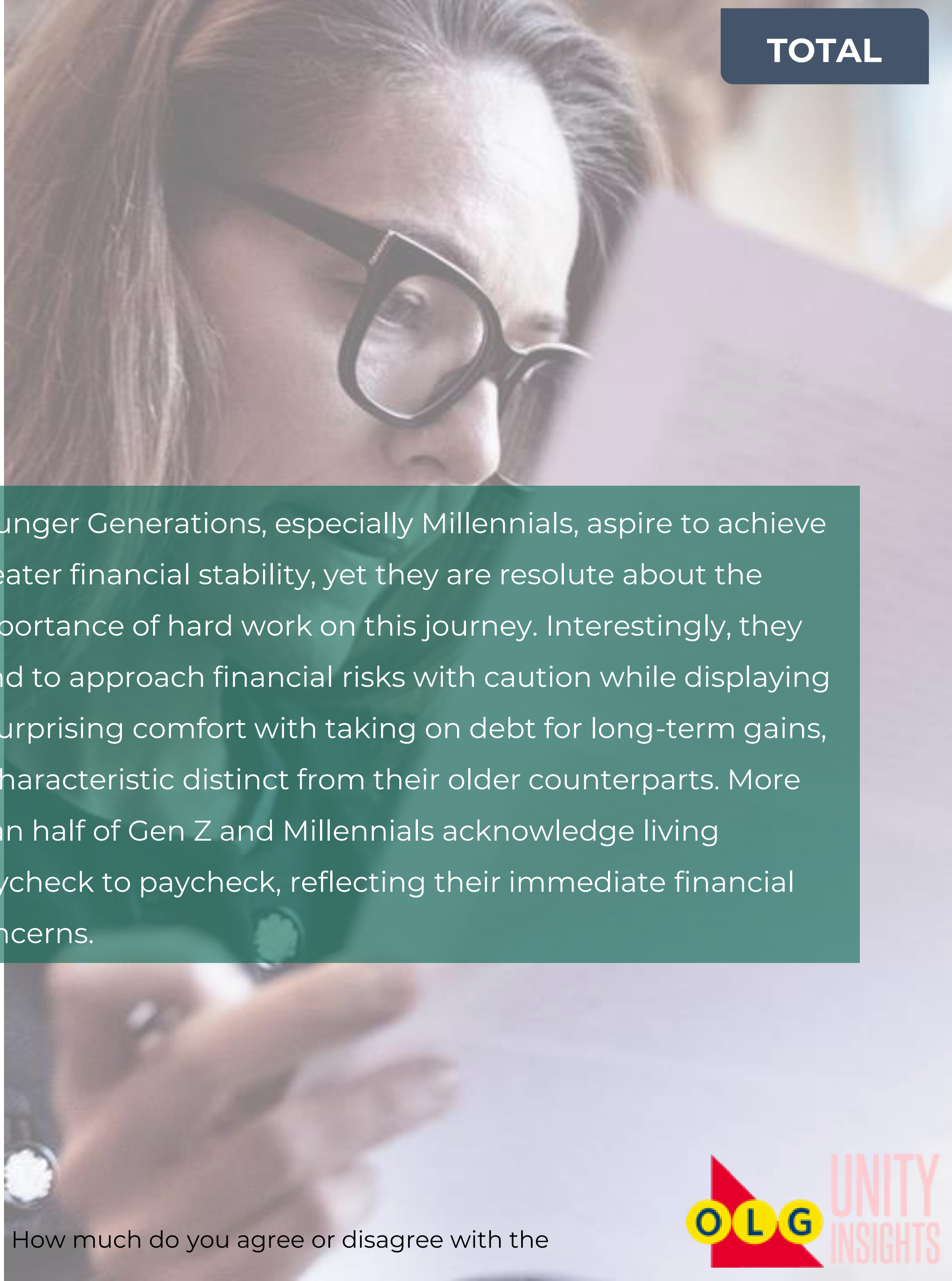
Financial Outlook

updated

TOTAL

Younger Generations' Financial Paradox: Aspiring for Prosperity with Caution and a Willingness to Invest in the Future





Younger Generations, especially Millennials, aspire to achieve greater financial stability, yet they are resolute about the importance of hard work on this journey. Interestingly, they tend to approach financial risks with caution while displaying a surprising comfort with taking on debt for long-term gains, a characteristic distinct from their older counterparts. More than half of Gen Z and Millennials acknowledge living paycheck to paycheck, reflecting their immediate financial concerns.

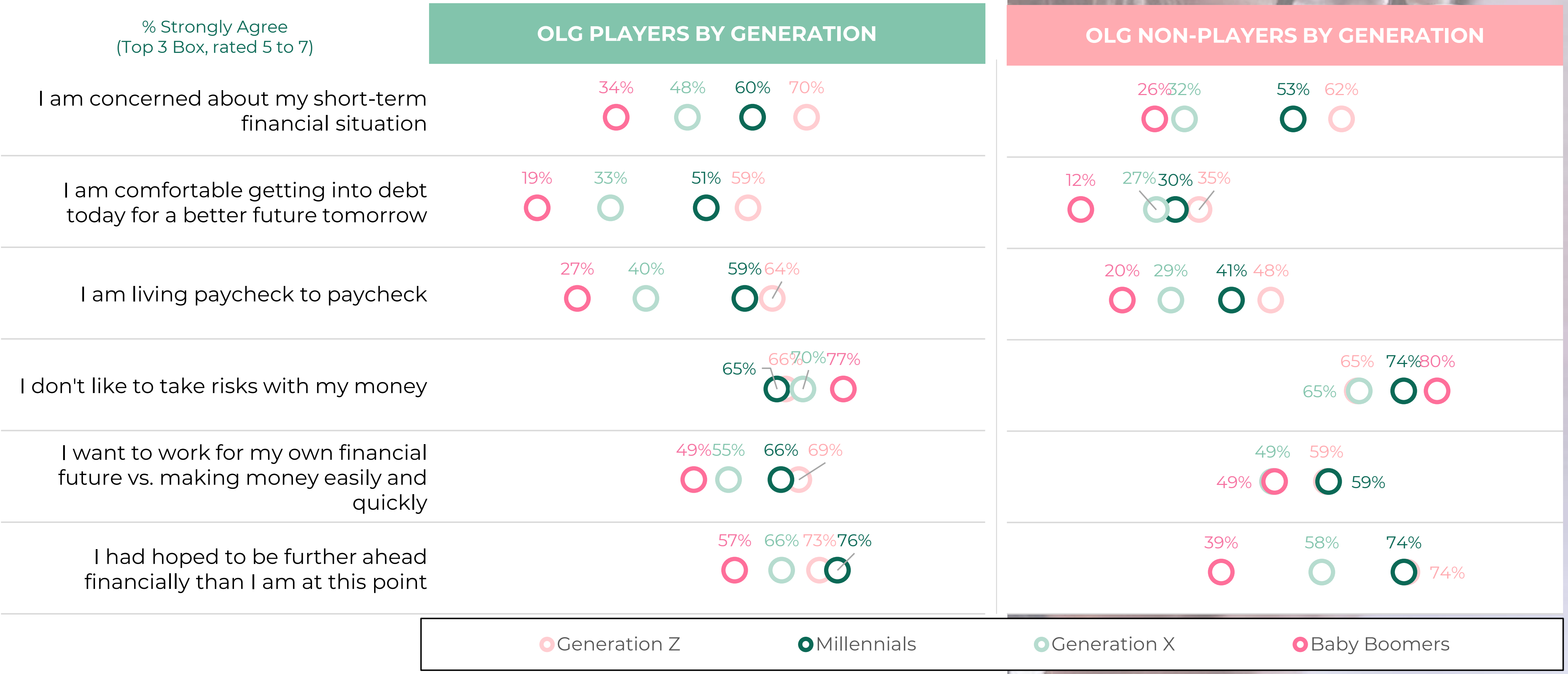
Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG UNITY INSIGHTS

Financial Outlook

OLG PLAYERS V. NON-PLAYERS

Gen Z's and Millennials aspiration for prosperity with caution and worrisome financial outlook is also evident for players and non-players, but differences are evident. Millennial and Gen Z non-players are somewhat less worried about their financial situation, fewer live paycheck to paycheck, yet, they are also less comfortable to investing in the future through going into debt than Millennial and Gen Z players

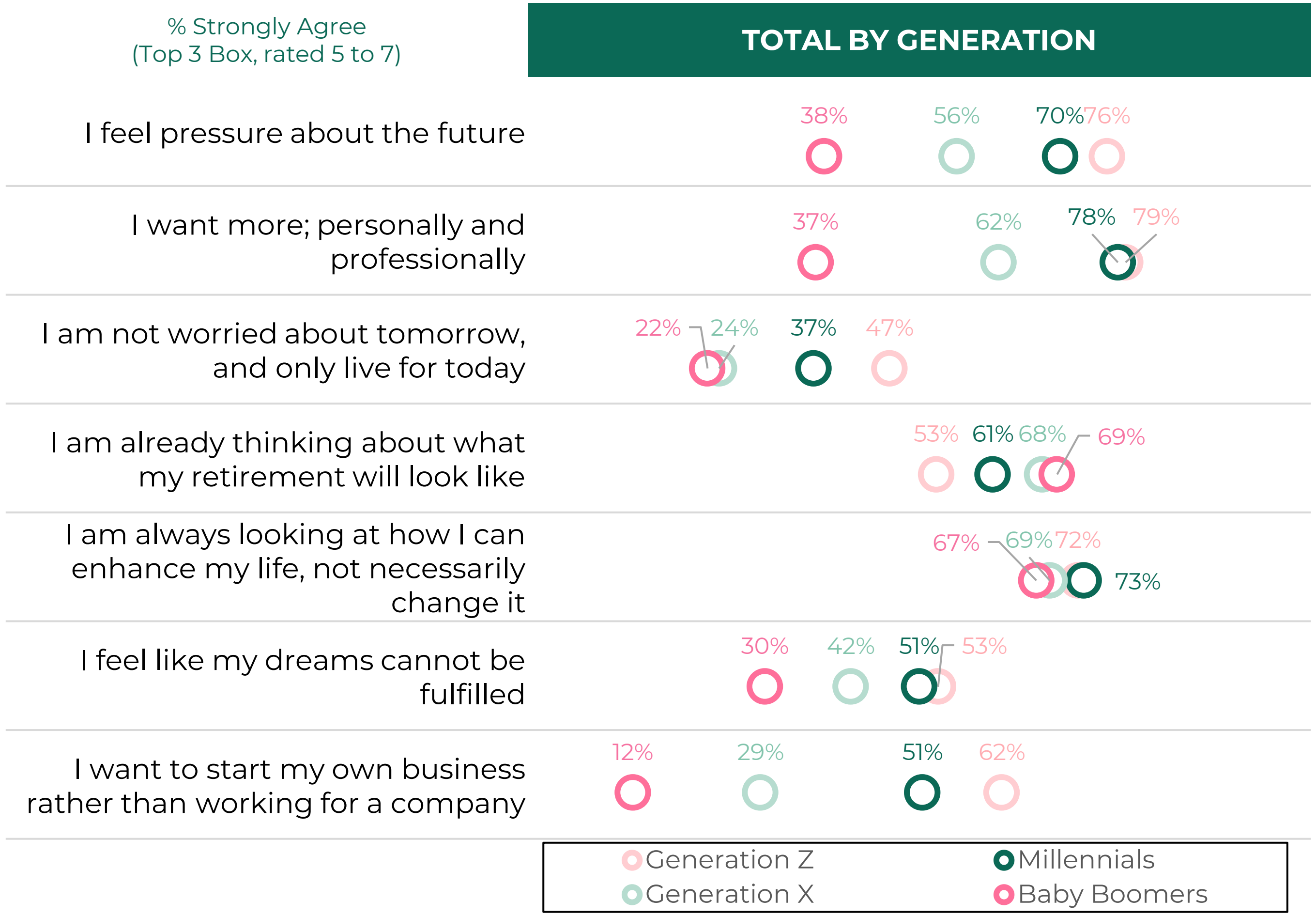


Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Future Aspirations

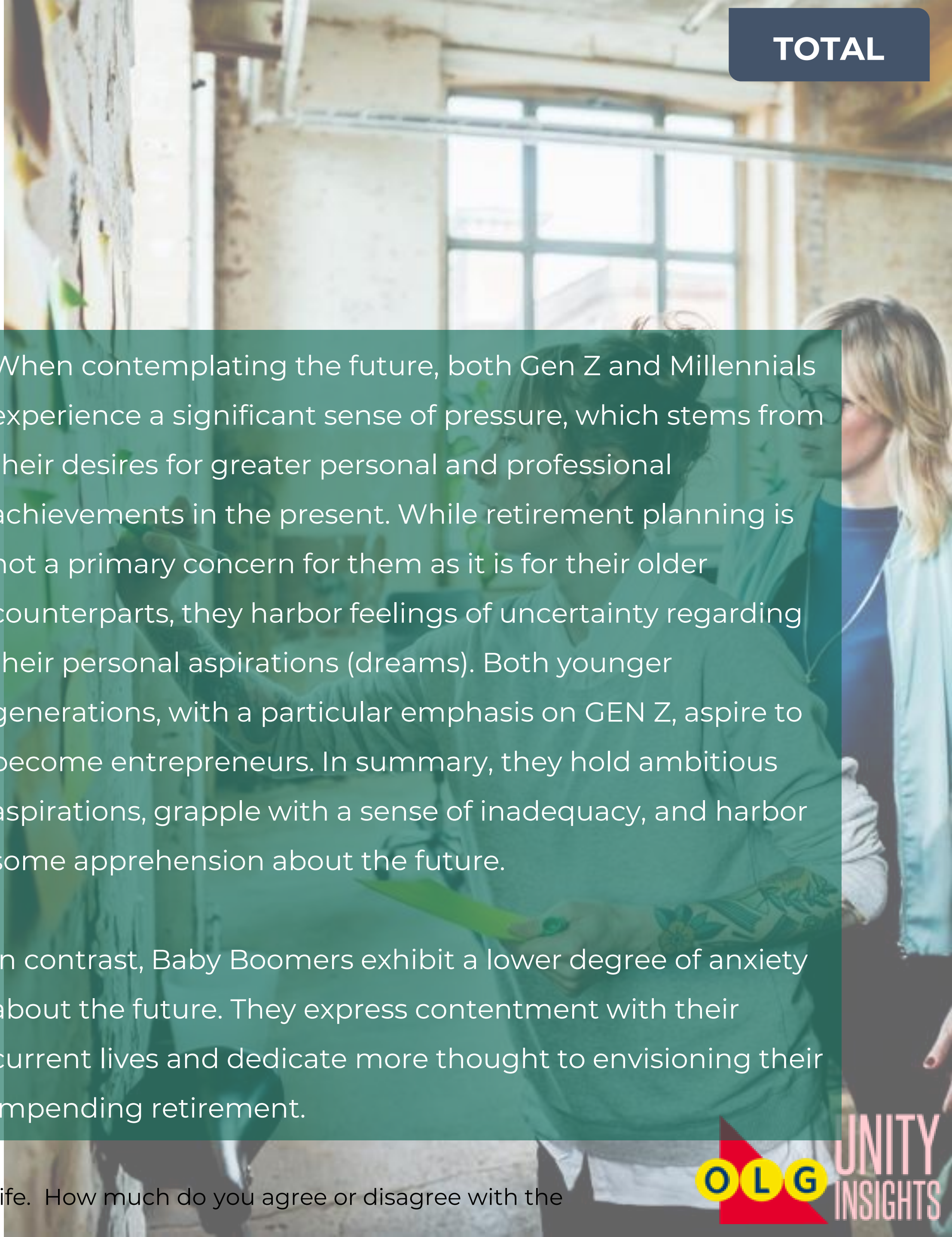
TOTAL

Youthful Ambitions vs. Contented Boomers: Contrasting Perspectives on the Future



When contemplating the future, both Gen Z and Millennials experience a significant sense of pressure, which stems from their desires for greater personal and professional achievements in the present. While retirement planning is not a primary concern for them as it is for their older counterparts, they harbor feelings of uncertainty regarding their personal aspirations (dreams). Both younger generations, with a particular emphasis on GEN Z, aspire to become entrepreneurs. In summary, they hold ambitious aspirations, grapple with a sense of inadequacy, and harbor some apprehension about the future.

In contrast, Baby Boomers exhibit a lower degree of anxiety about the future. They express contentment with their current lives and dedicate more thought to envisioning their impending retirement.

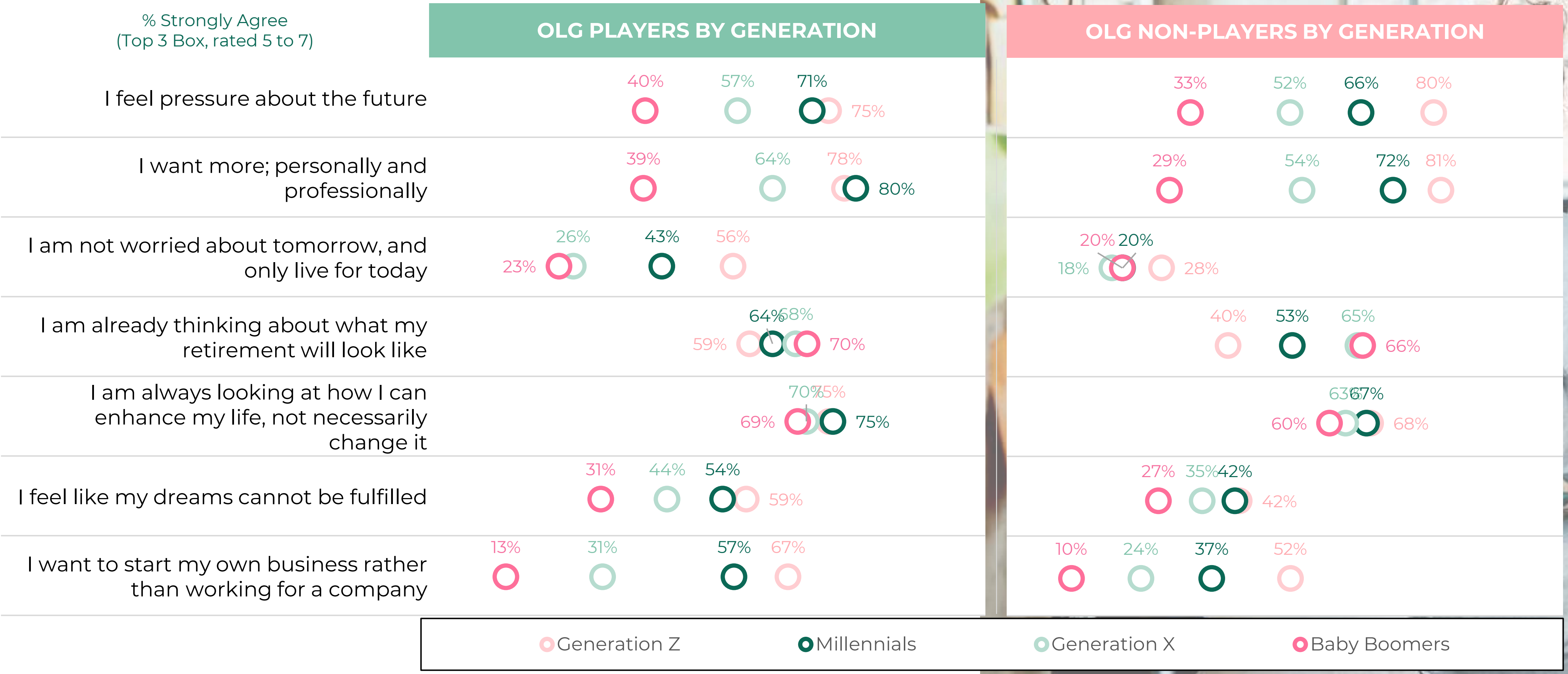


Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Future Aspirations

OLG PLAYERS V. NON-PLAYERS

Overall, future aspirations seem similar when comparing players and non-players for each generation. Notable differences exist in some areas, specifically, Gen Z and Millennial players are much more living for today (not worrying about the future) than younger non-players, yet they think more about retirement and looking for how to enhance their life than younger non-players.



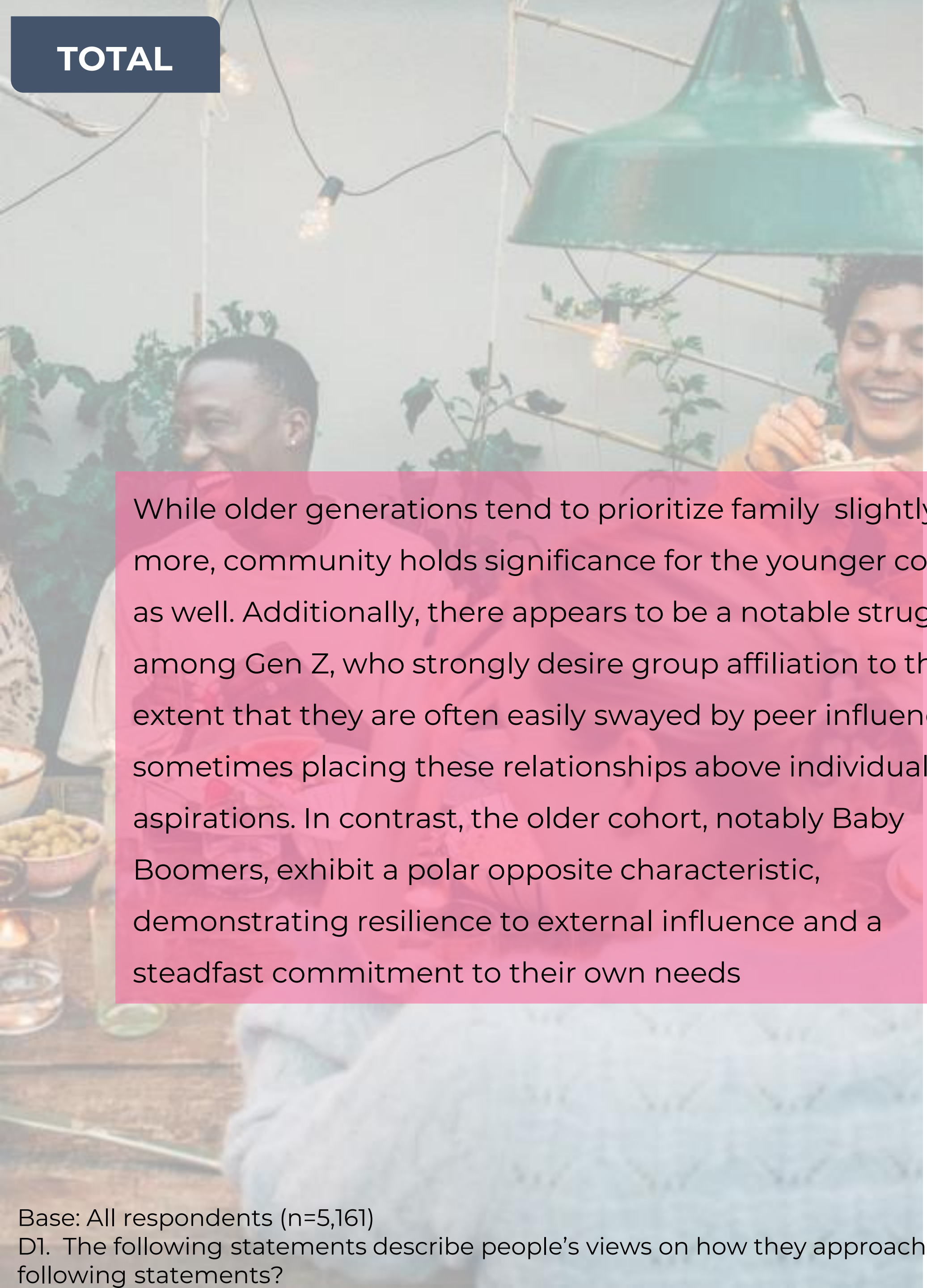
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG UNITY INSIGHTS

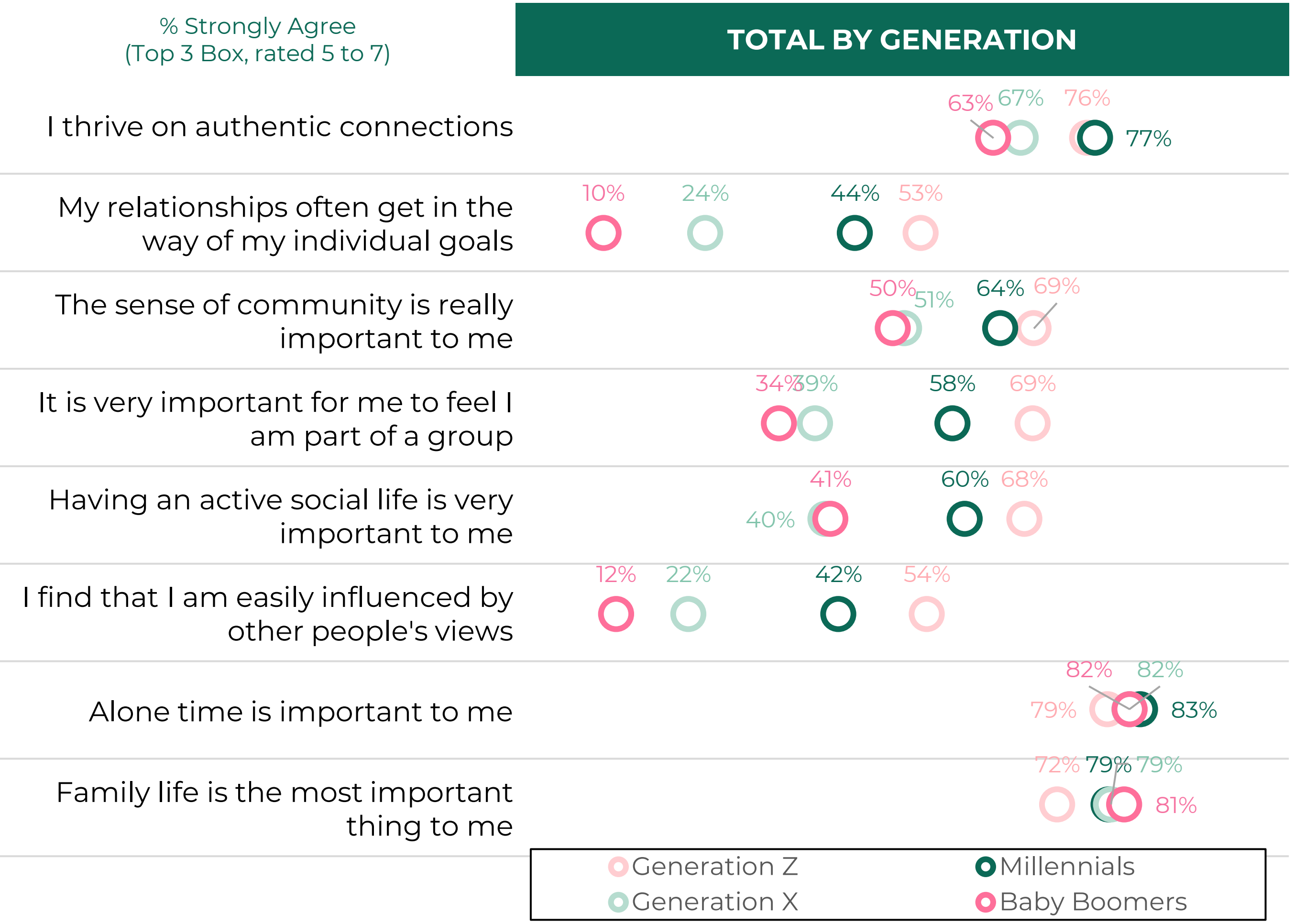
TOTAL

Connections & Community

Generational Value Shifts: The Interplay Between Family, Community, and Peer Influence from Baby Boomers to Gen Z



While older generations tend to prioritize family slightly more, community holds significance for the younger cohort as well. Additionally, there appears to be a notable struggle among Gen Z, who strongly desire group affiliation to the extent that they are often easily swayed by peer influence, sometimes placing these relationships above individual aspirations. In contrast, the older cohort, notably Baby Boomers, exhibit a polar opposite characteristic, demonstrating resilience to external influence and a steadfast commitment to their own needs

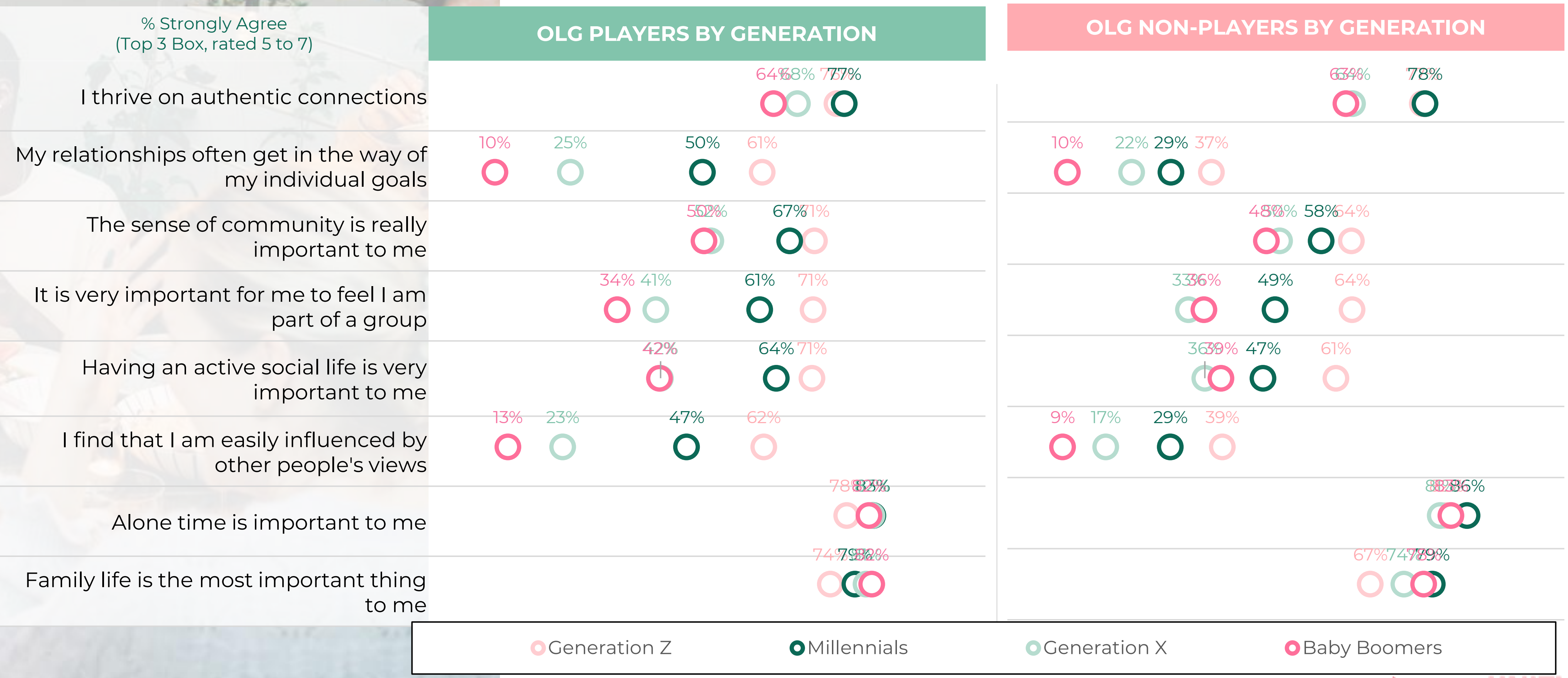


Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG PLAYERS V. NON-PLAYERS

Connections & Community

Community, authentic connections and social relationships are important for younger players and non-players. Interestingly, younger non-players seem more independent and looking out for their own individual needs than players.



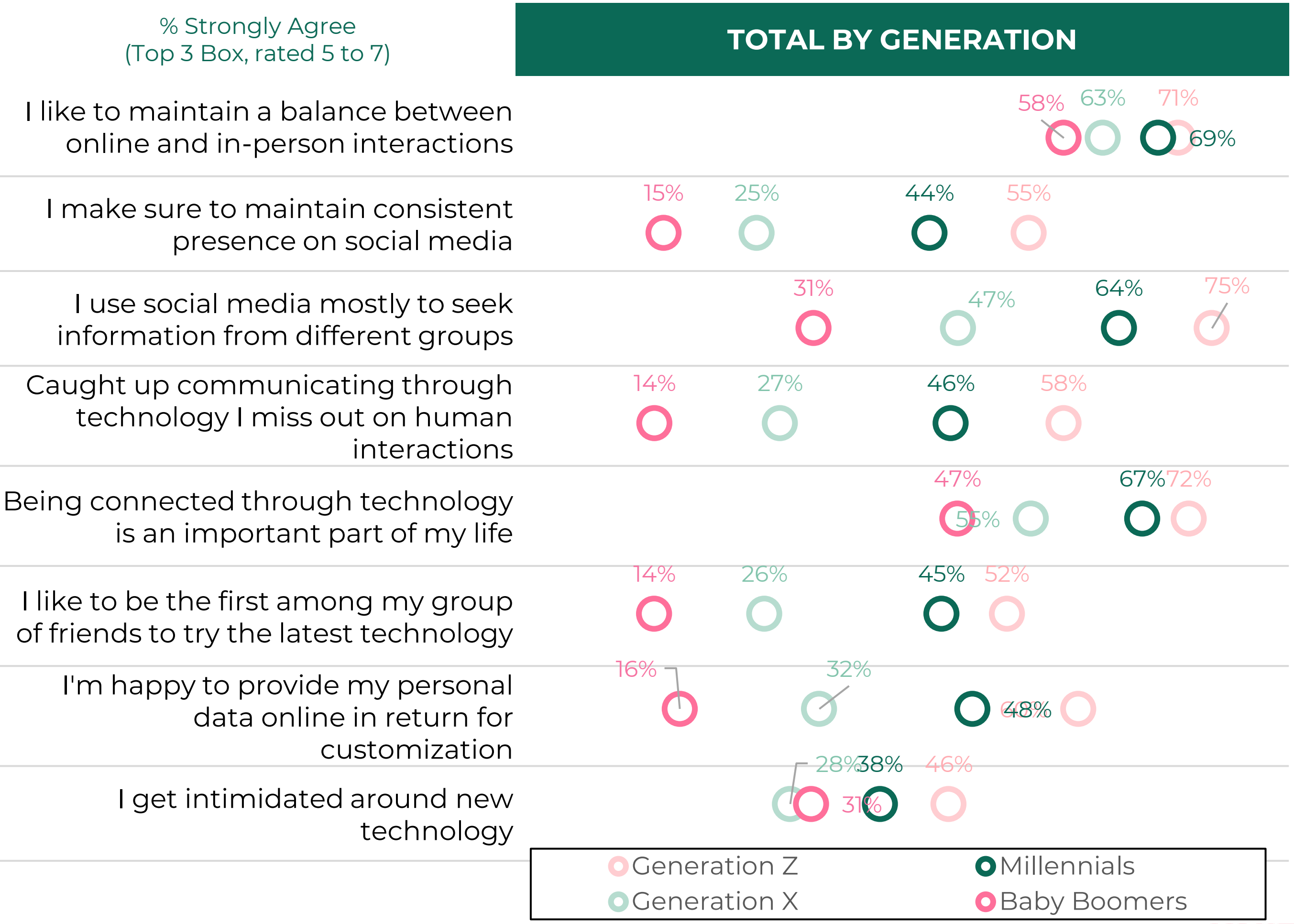
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

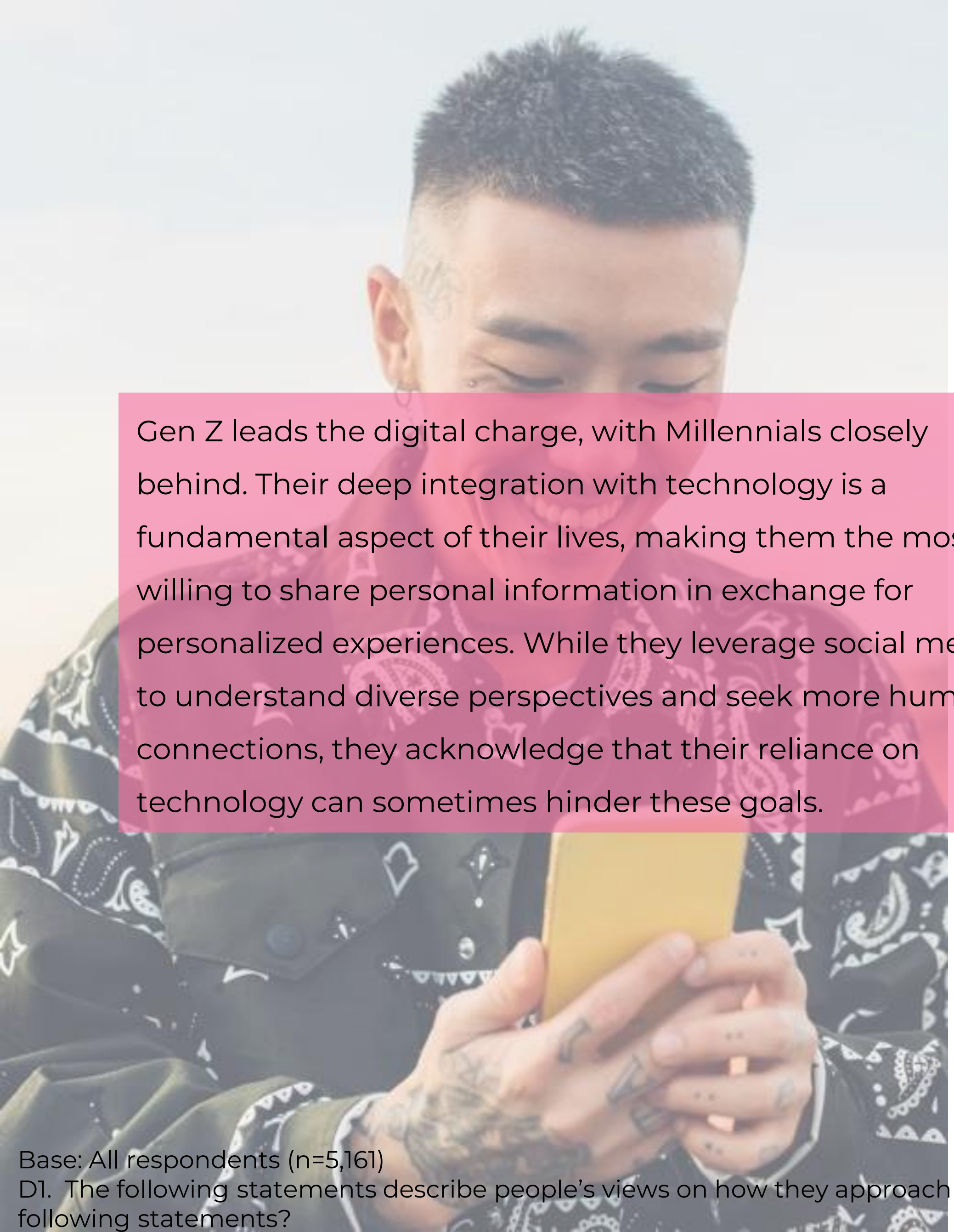
TOTAL

Technology & Social Media

updated

Gen Z and Millennials: Embracing Digital Life, Balancing Connection and Dependency





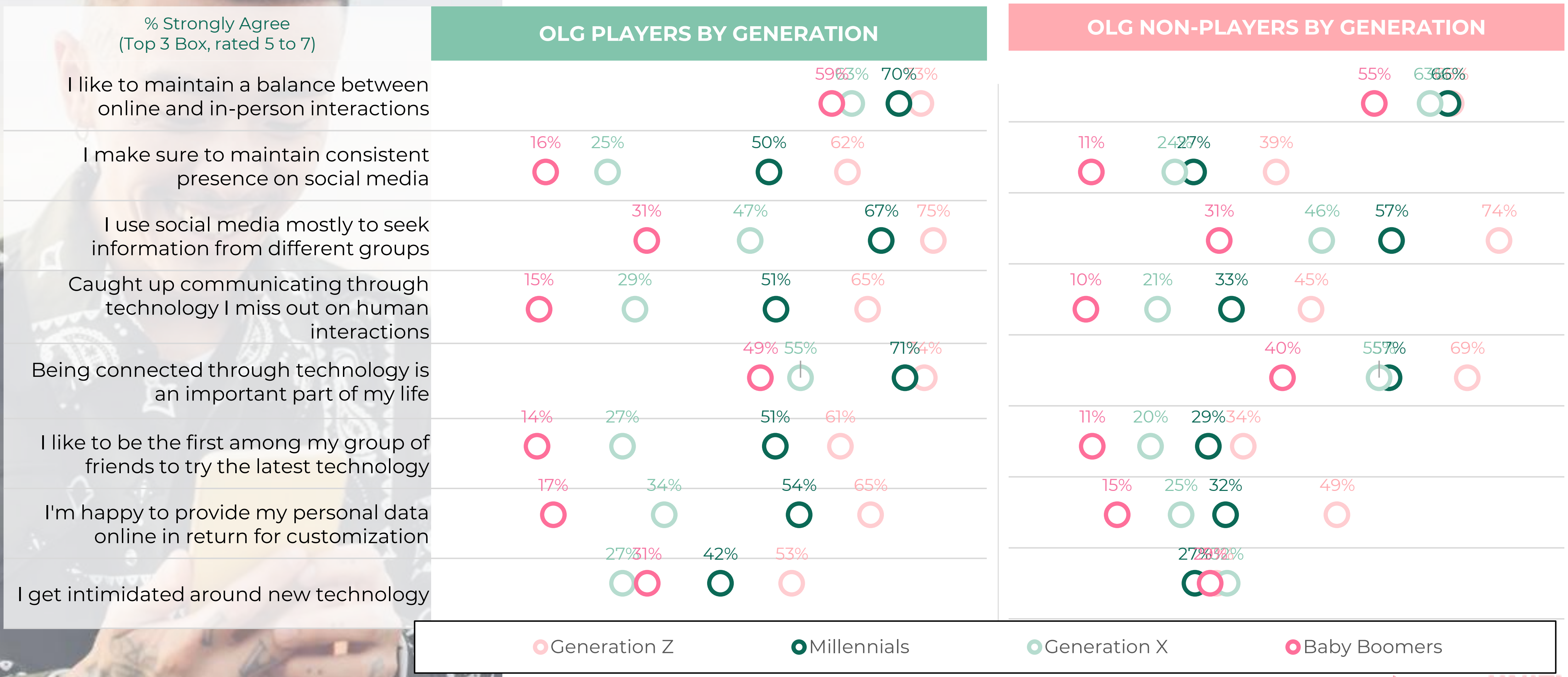
Gen Z leads the digital charge, with Millennials closely behind. Their deep integration with technology is a fundamental aspect of their lives, making them the most willing to share personal information in exchange for personalized experiences. While they leverage social media to understand diverse perspectives and seek more human connections, they acknowledge that their reliance on technology can sometimes hinder these goals.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

OLG PLAYERS V. NON-PLAYERS

Technology & Social Media

Millenials lead the digital charge, however some differences exist between OLG players and OLG non-players. Non-players are less engaged with social media, less open to trying new technology and also more cautious in providing personal information online. This is relevant for OLG to consider when it comes to communication efforts and trying to connect with the U35 non-player group

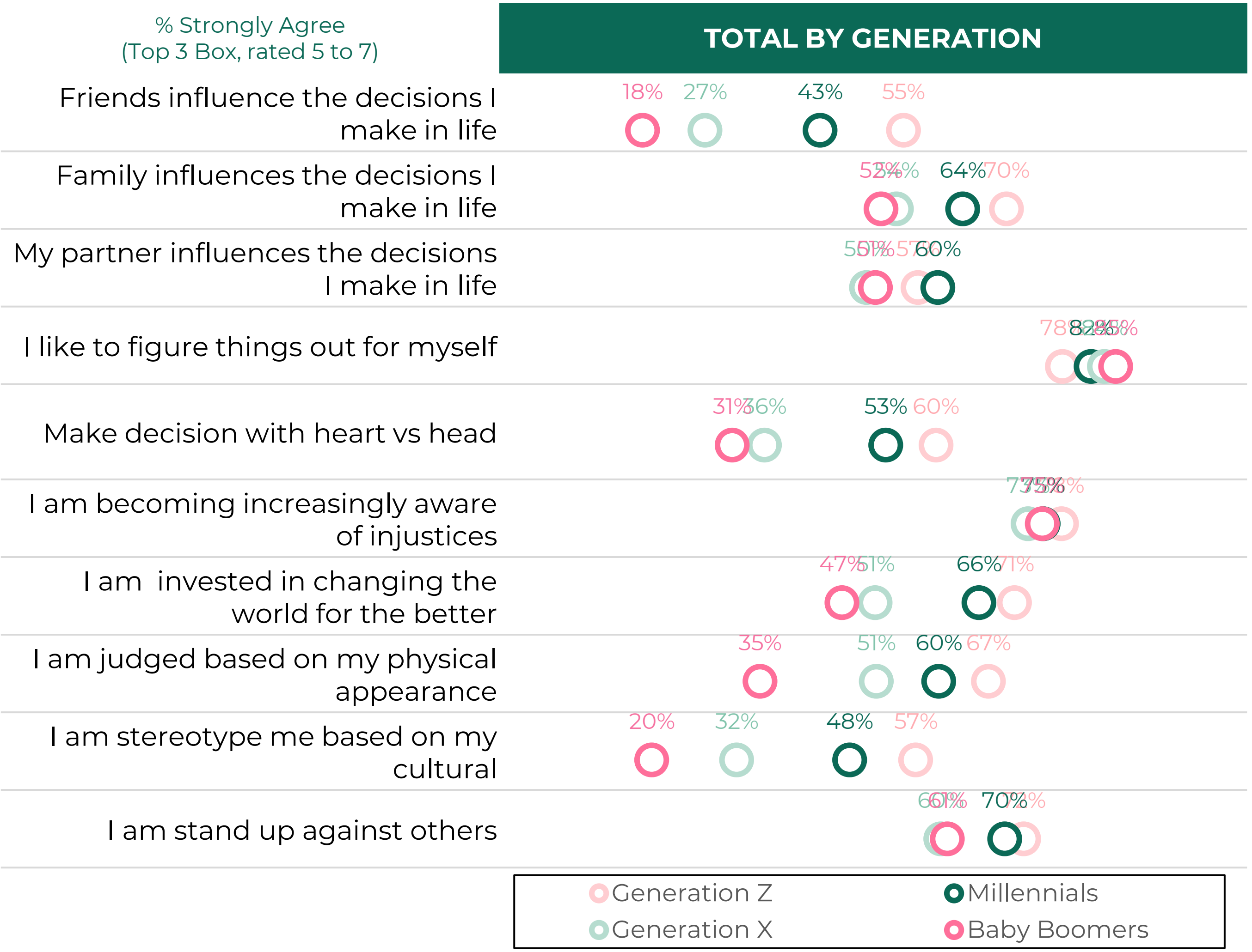


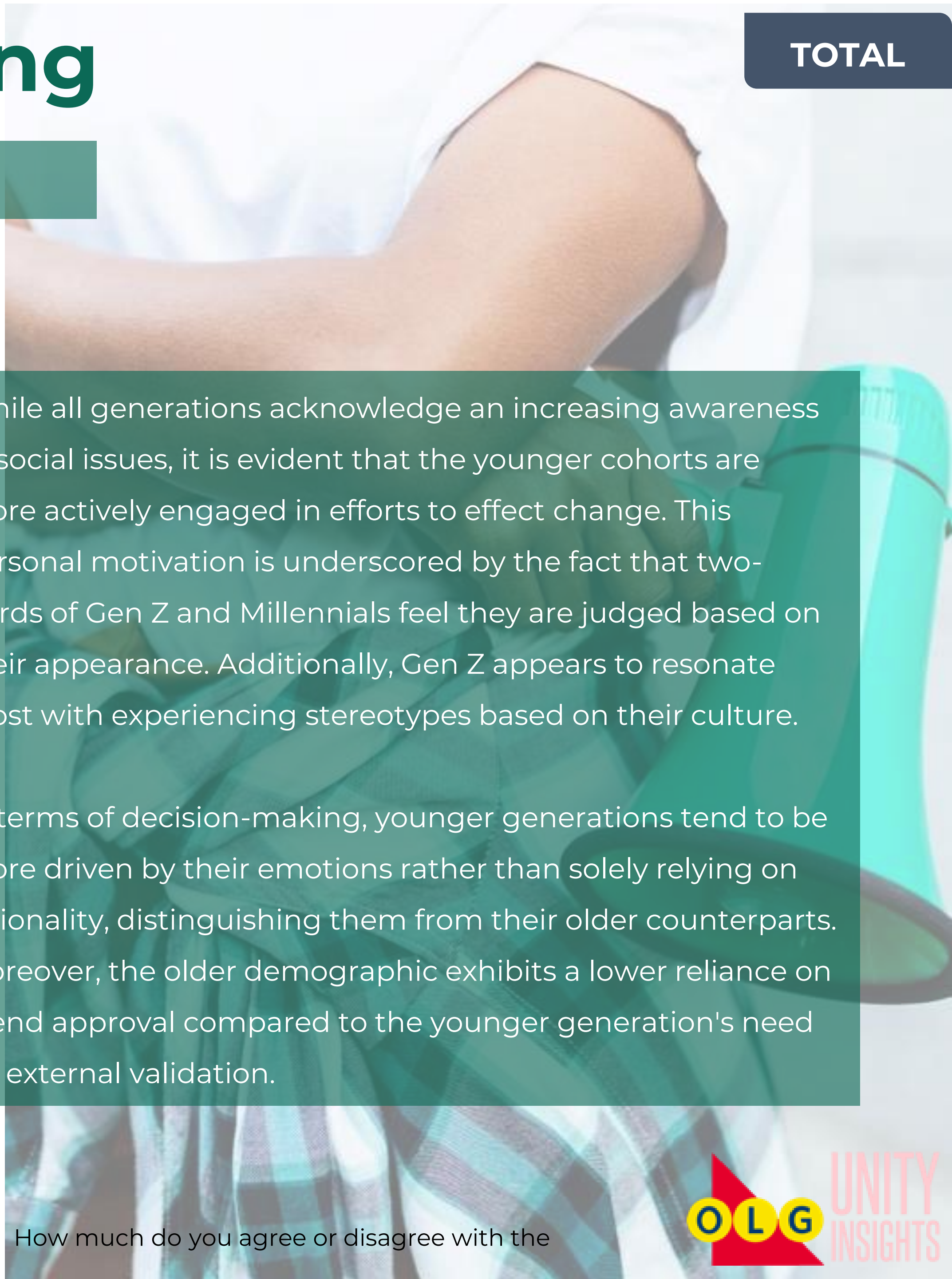
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Social Issues & Decision Making

TOTAL

Youthful Activism and Emotional Decision Making





While all generations acknowledge an increasing awareness of social issues, it is evident that the younger cohorts are more actively engaged in efforts to effect change. This personal motivation is underscored by the fact that two-thirds of Gen Z and Millennials feel they are judged based on their appearance. Additionally, Gen Z appears to resonate most with experiencing stereotypes based on their culture.

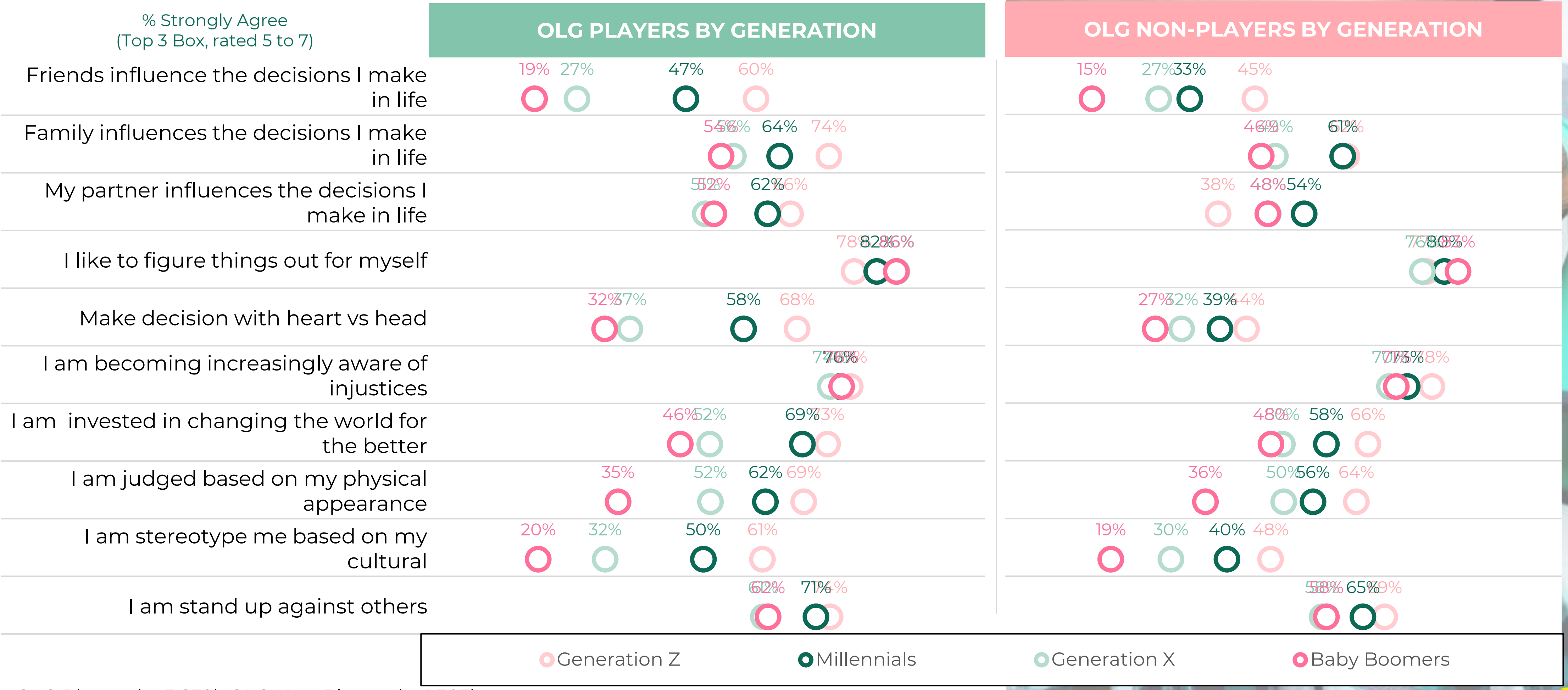
In terms of decision-making, younger generations tend to be more driven by their emotions rather than solely relying on rationality, distinguishing them from their older counterparts. Moreover, the older demographic exhibits a lower reliance on friend approval compared to the younger generation's need for external validation.

Base: All respondents (n=5,161)
D1. The following statements describe people’s views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Social Issues & Decision Making

OLG PLAYERS V. NON-PLAYERS

Awareness of social injustices is widespread among all generations for both players and non-players. Moreover, younger non-players seem more autarch and less influenced by external factors (friends, family, partner) in their decision making.



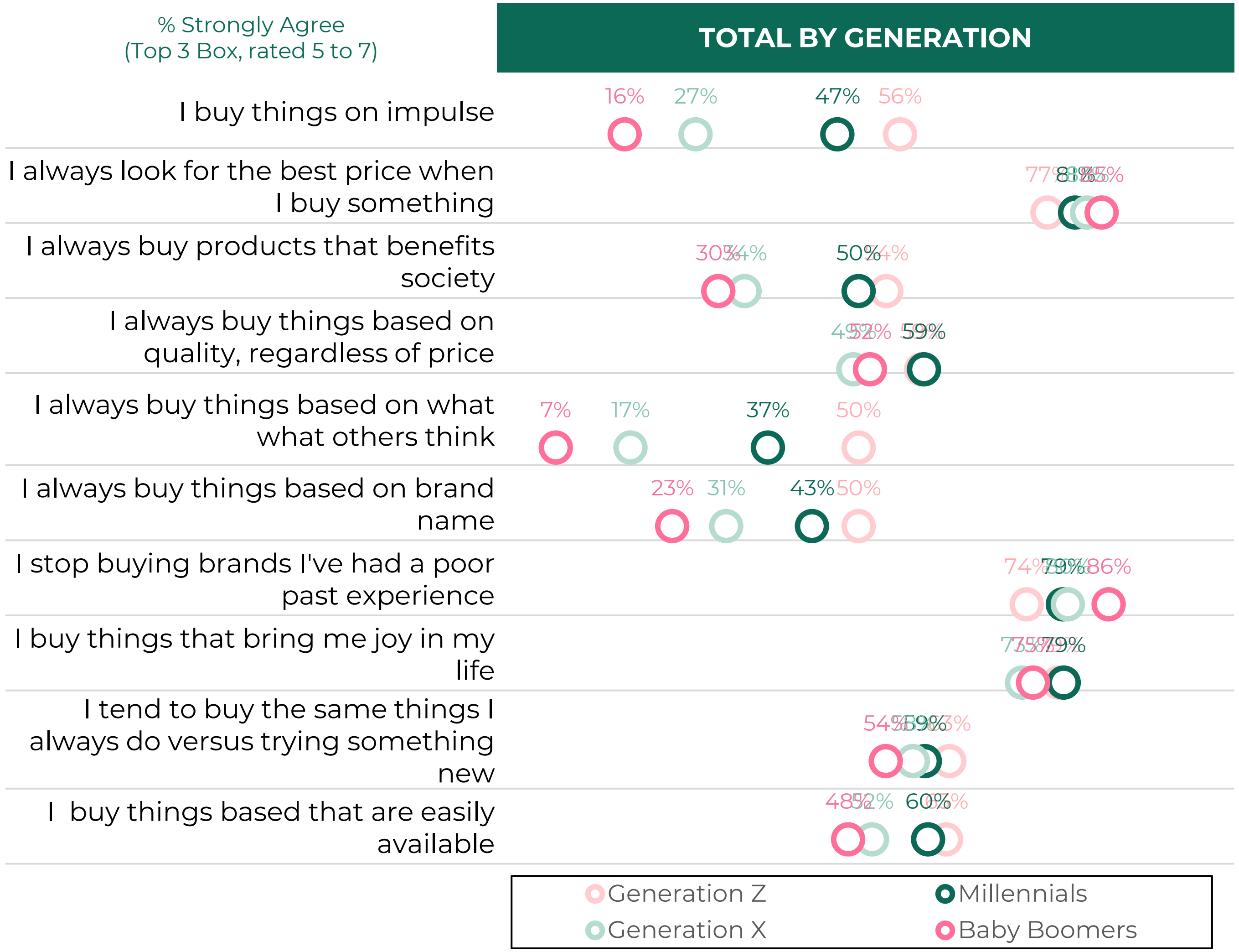
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)

D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Purchase Behaviour

TOTAL

A Balance of Common Ground and Cultural Influence



When making purchasing decisions, it appears that there are several commonalities across generations. This holds especially true for factors like convenience, loyalty, enjoyment, and the overall customer experience, all of which hold significant importance for all generations.

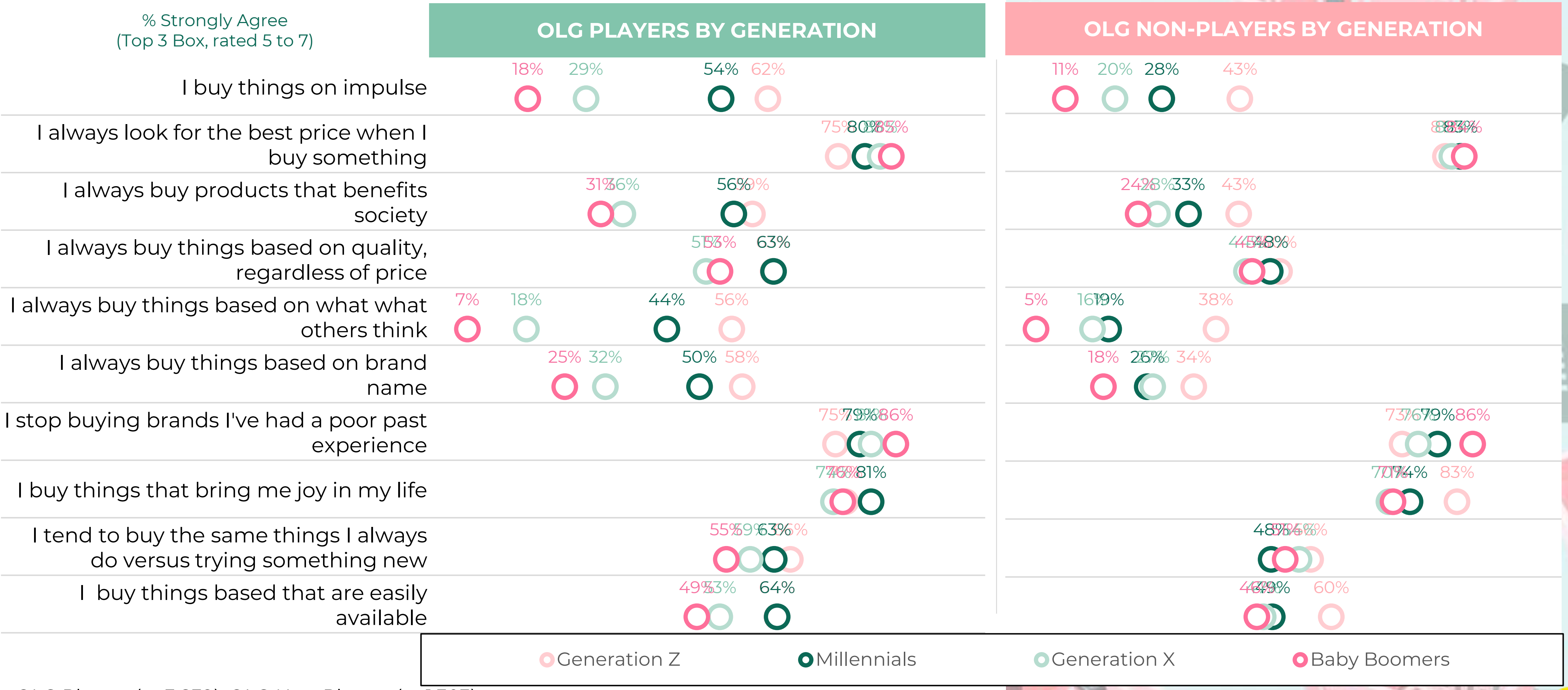
However, it becomes evident that the younger demographic is notably more swayed by popular culture and community influences. To be specific, brand name and peer perceptions carry greater weight for the younger cohort compared to their older counterparts. Additionally, they tend to exhibit more impulsive buying behaviors.

Base: All respondents (n=5,161)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

Purchase Behaviour

OLG PLAYERS V. NON-PLAYERS

Price, loyalty, enjoyment, and the overall customer experience hold high importance for players and non-players across generations. Yet, differences become evident when it comes to impulse buying, societal benefits, brand and peer influence. All these factors seem to be less important to non-players compared to players, suggesting that their purchase behaviour is more autarch.



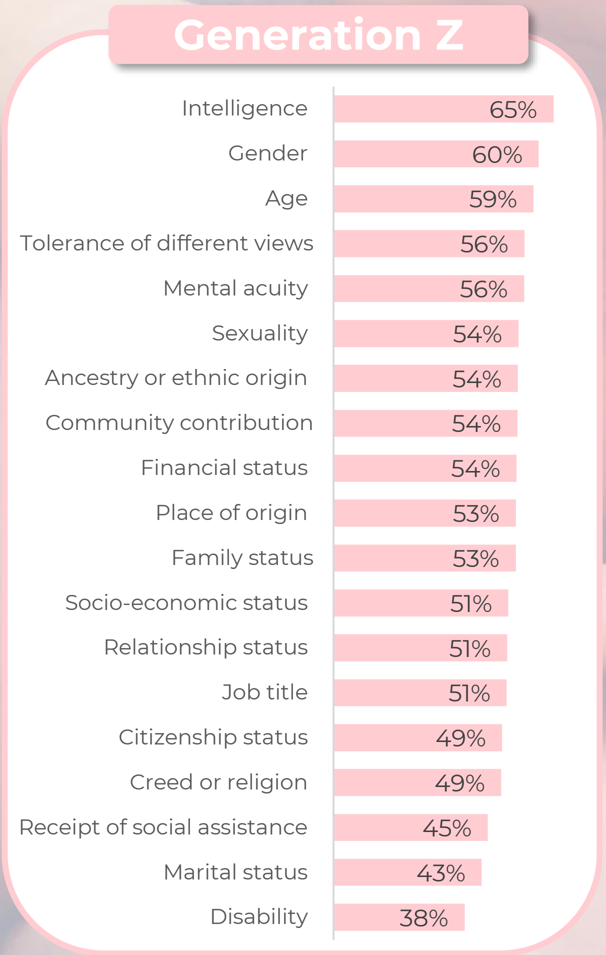
Base: OLG Players (n=3,839), OLG Non-Players (n=1,303)
D1. The following statements describe people's views on how they approach and where they are at in their life. How much do you agree or disagree with the following statements?

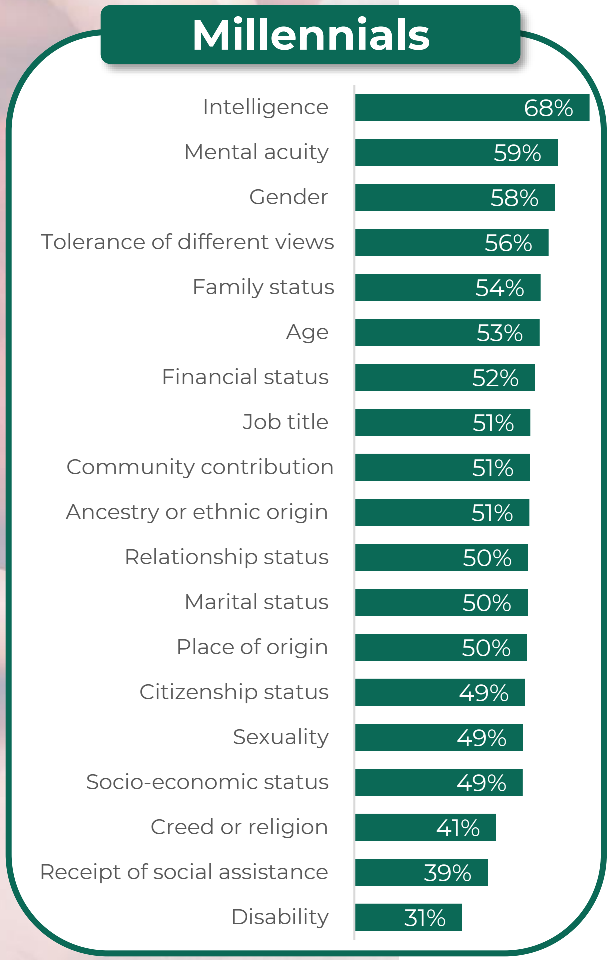
TOTAL

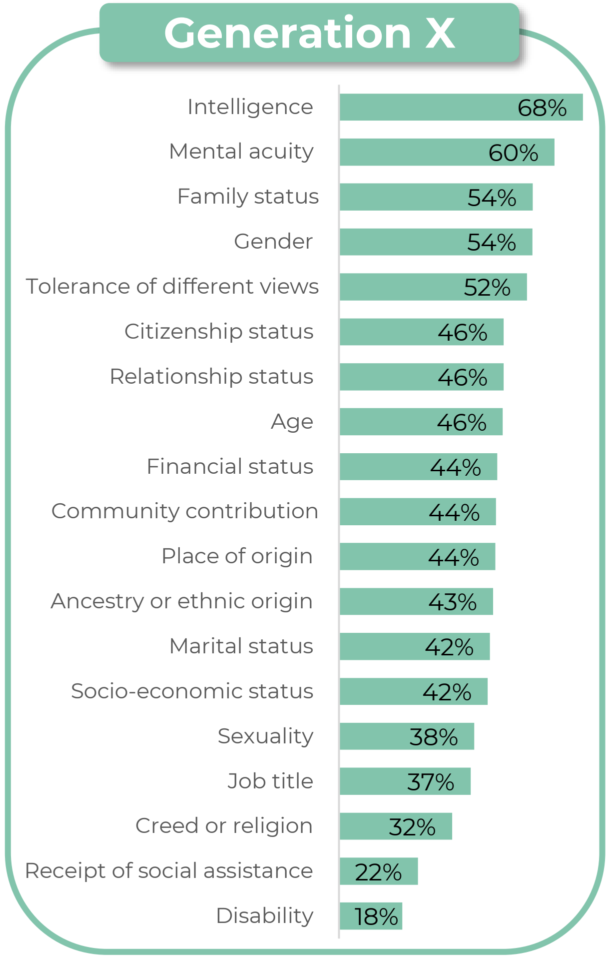
Self Identity

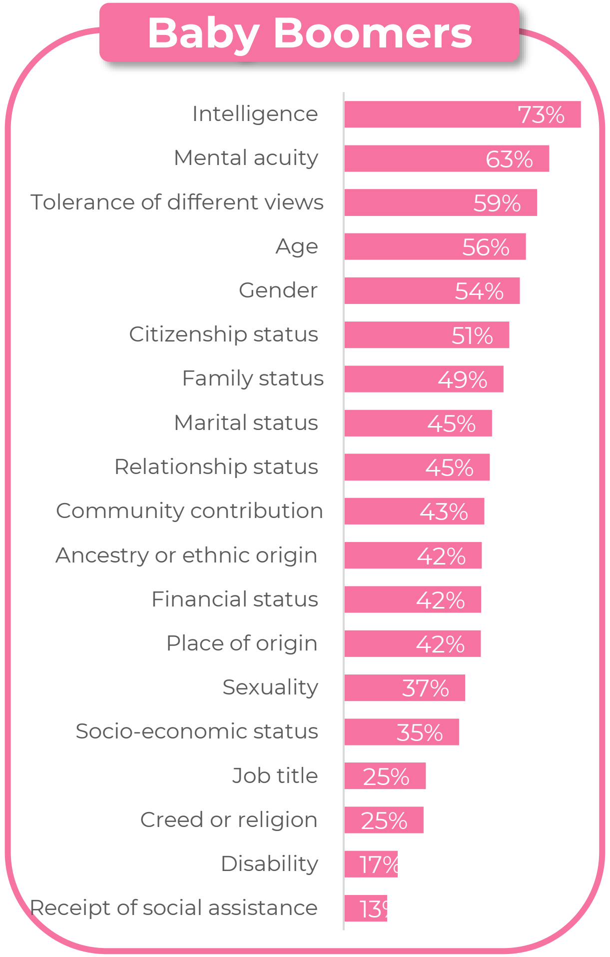
% Completely Defines Me
(Top 3 Box, rated 5 to 7)

Interestingly, many characteristics seem to define each of the generational cohort with no single characteristic being dominant.









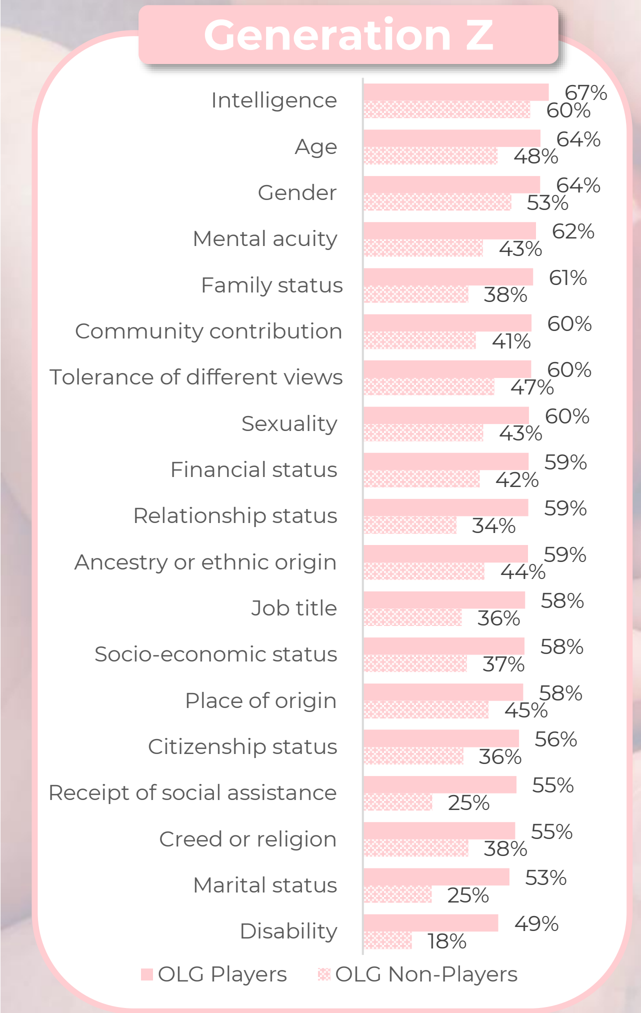
Base: All respondents (n=5,161)
G1. The following are attributes by which some people define themselves personally or socially. How much to the following define who you are as a human?

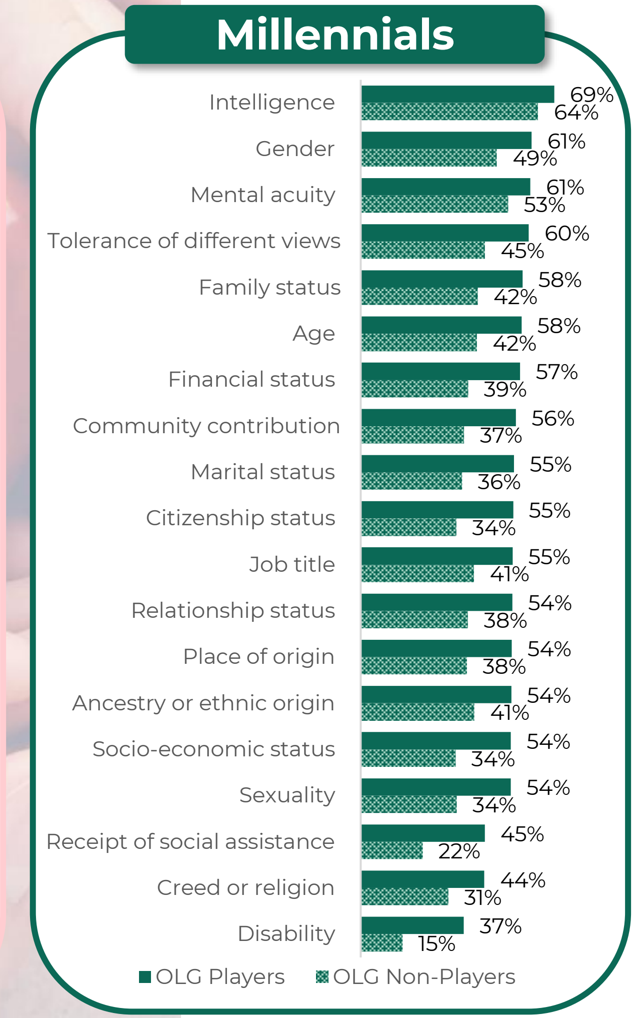
OLG PLAYERS V. NON-PLAYERS

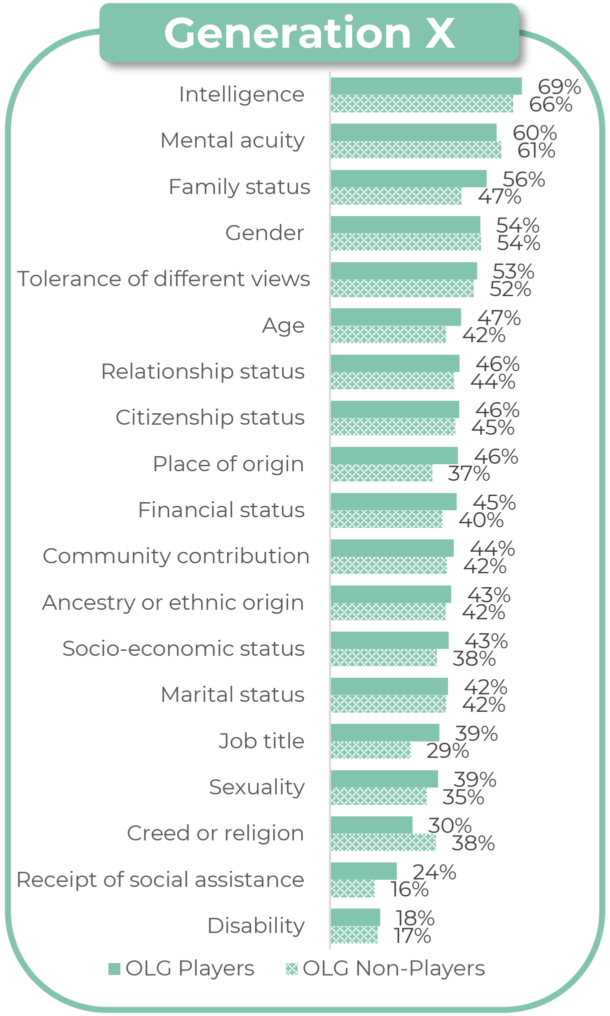
Self Identity

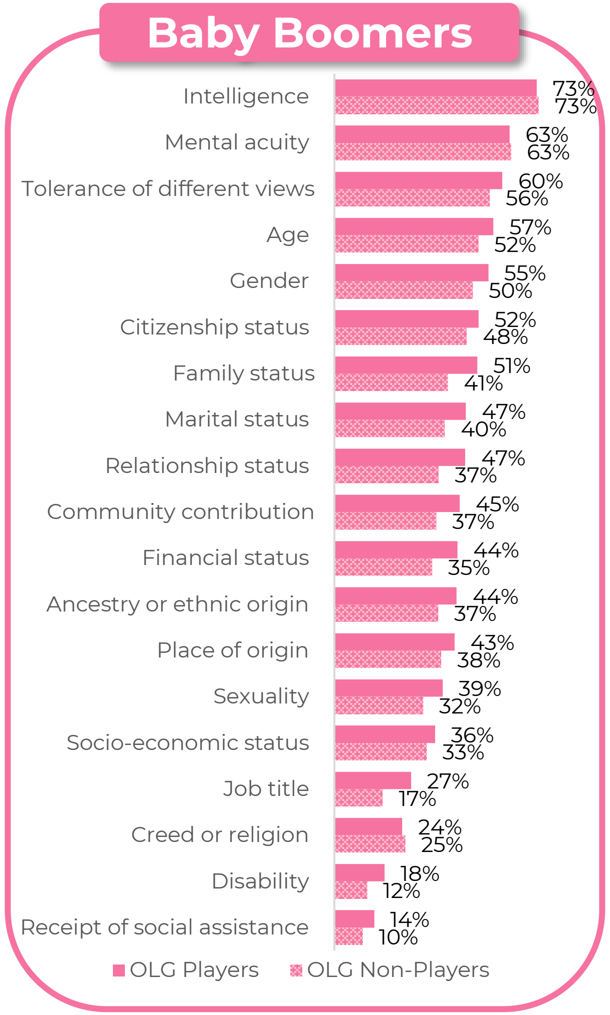
% Completely Defines Me
(Top 3 Box, rated 5 to 7)

Overall, non-players seem to define themselves less by social or individual elements than players and this is evident across all generations.









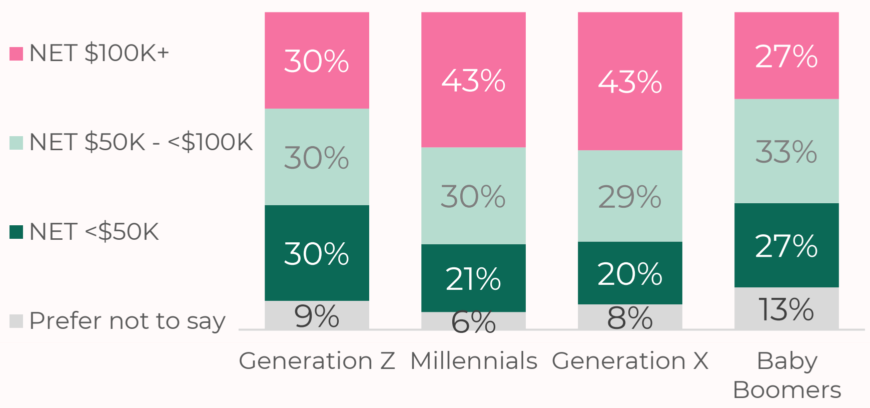
Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
G1. The following are attributes by which some people define themselves personally or socially. How much to the following define who you are as a human?

Demographic Profile

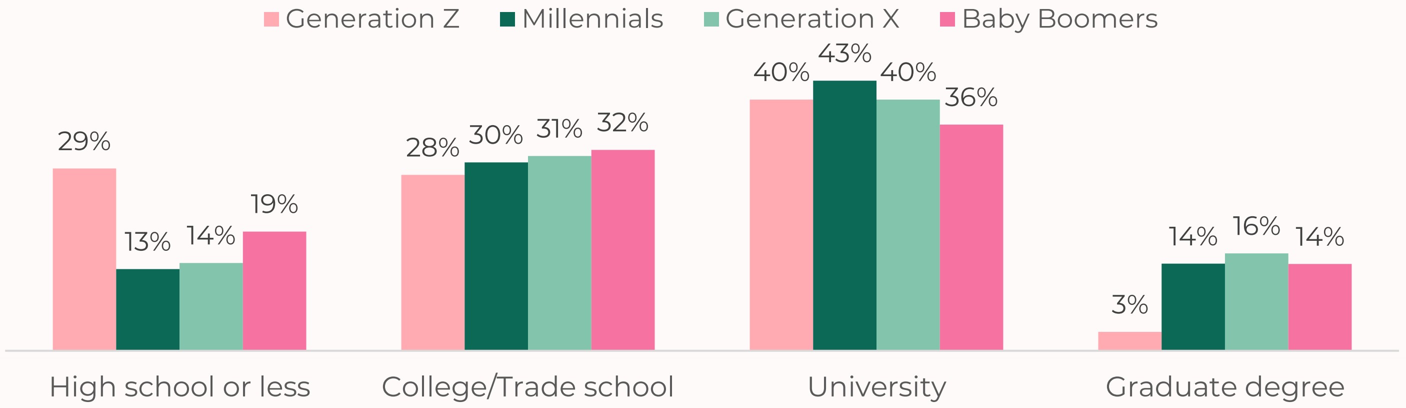
Millennials and Gen X have a higher income, kids in household, are more likely to be married than Gen Z.

Total by Generation

INCOME



EDUCATION



People in Household

	Generation Z	Millennials	Generation X	Baby Boomers
Live alone	11%	14%	21%	26%
Two people	20%	28%	32%	54%
Three people	30%	30%	19%	12%
Four people	24%	19%	19%	5%
Five or more	16%	9%	10%	2%

Kids in Household % Yes

30%	Generation Z
47%	Millennials
32%	Generation X
4%	Baby Boomers

Marital Status

	Generation Z	Millennials	Generation X	Baby Boomers
Married/ Common-law	22%	63%	64%	64%
Single, never married	76%	34%	24%	13%
Separated/ Divorced	2%	3%	11%	15%
Widowed	0%	1%	1%	8%

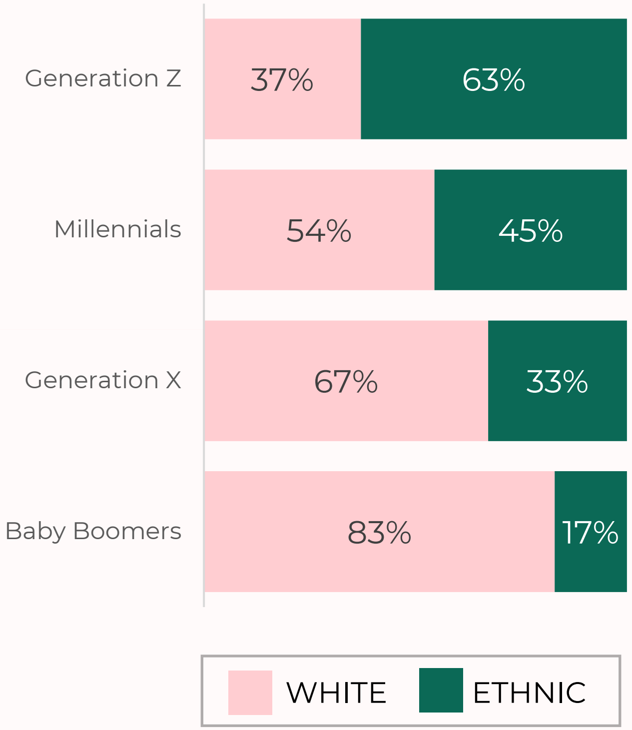
Base: All respondents (n=5,161)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile

Gen Z is the ethnically most diverse generation and close to half identify as visible minority.

Total by Generation

ETHNIC BACKGROUND



- White (37%)
- Indigenous (21%)
- South Asian (12%)
- Black (11%)
- Other (21%)

- White (54%)
- Indigenous (13%)
- South Asian (8%)
- Chinese (8%)
- Other (18%)

- White (67%)
- Chinese (8%)
- South Asian (5%)
- Black (4%)
- Other (16%)

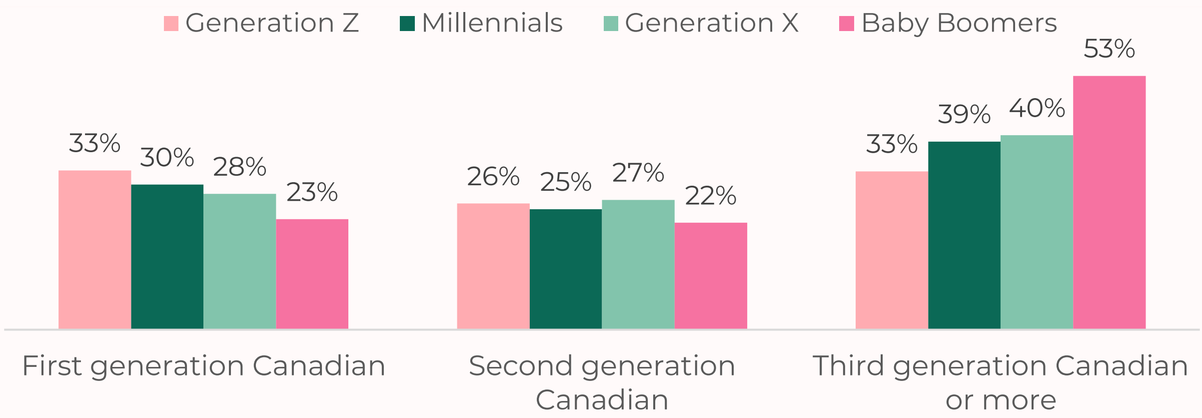
- White (83%)
- Chinese (6%)
- South Asian (2%)
- Other (10%)

VISIBLE MINORITY
% Yes

48%	Generation Z
32%	Millennials
26%	Generation X
14%	Baby Boomers

Born in Canada
% Yes

77%	Generation Z
75%	Millennials
74%	Generation X
77%	Baby Boomers



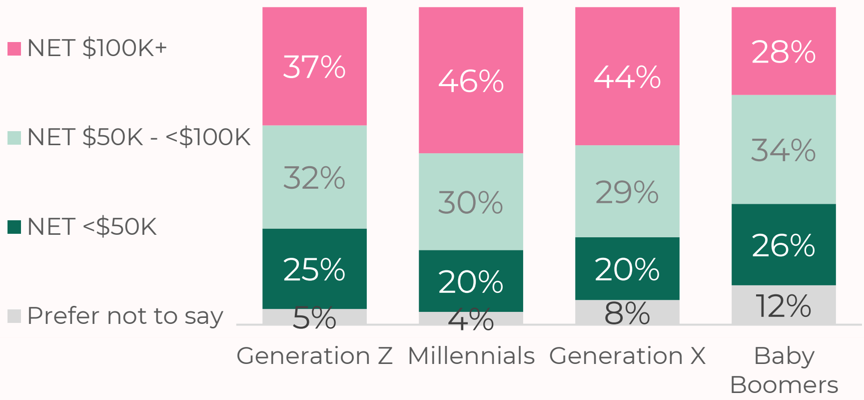
Base: All respondents (n=5,161)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

Demographic Profile

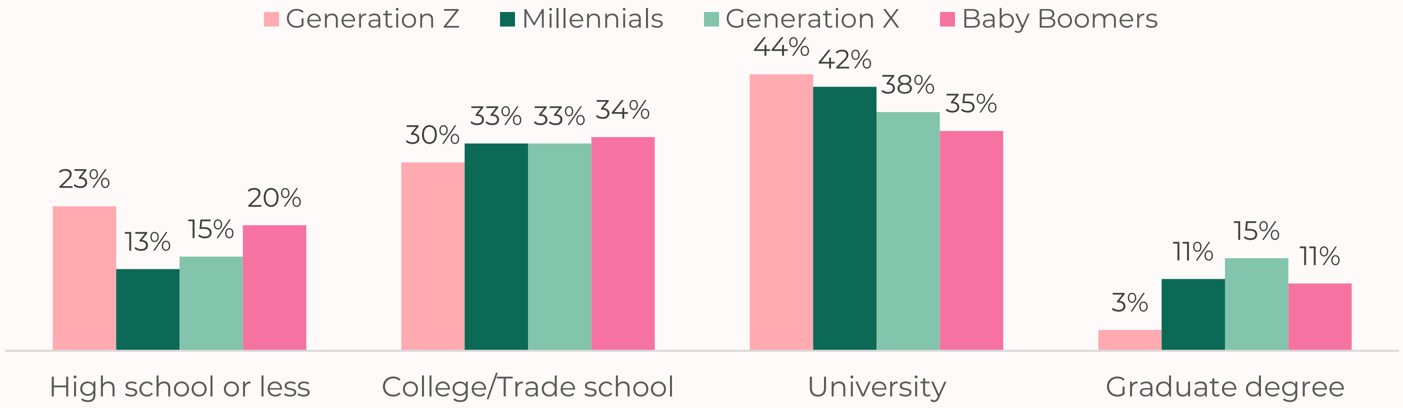
Among players, Millennials have the highest income and education, followed by Gen X.

OLG Players by Generation

INCOME



EDUCATION



People in Household

	Generation Z	Millennials	Generation X	Baby Boomers
Live alone	11%	11%	20%	24%
Two people	20%	28%	32%	55%
Three people	34%	32%	19%	13%
Four people	24%	20%	20%	5%
Five or more	12%	9%	9%	3%

Kids in Household % Yes

29%	Generation Z
51%	Millennials
32%	Generation X
4%	Baby Boomers

Marital Status

	Generation Z	Millennials	Generation X	Baby Boomers
Married/ Common-law	27%	65%	63%	66%
Single, never married	71%	31%	23%	11%
Separated/ Divorced	2%	2%	12%	16%
Widowed	0%	1%	2%	7%

Base: OLG Players (n=3,850)

X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

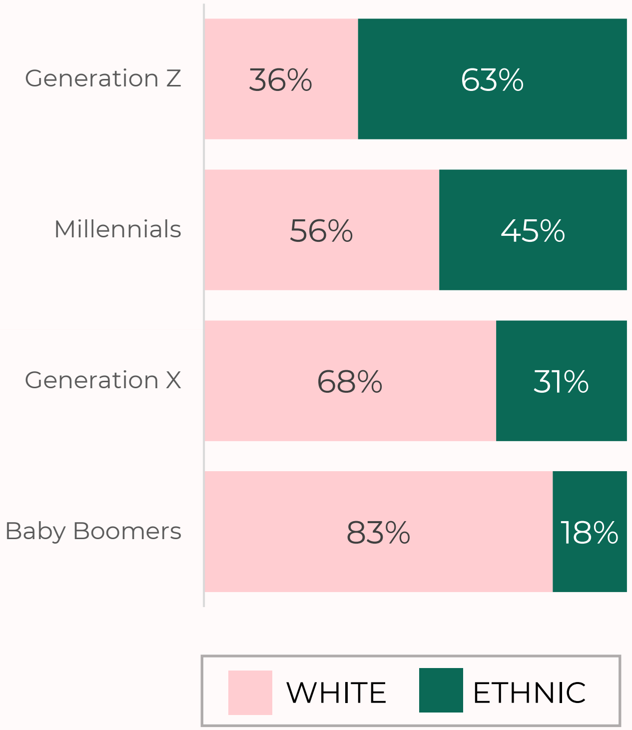
Demographic Profile

updated

Similar to overall, Gen Z players is the ethnically most diverse generation and close to half identify as visible minority

OLG Players by Generation

ETHNIC BACKGROUND



- White (36%)
- Indigenous (29%)
- South Asian (9%)
- Black (9%)
- Other (18%)

- White (56%)
- Indigenous (15%)
- South Asian (8%)
- Chinese (6%)
- Black (6%)
- Other (11%)

- White (68%)
- Chinese (7%)
- South Asian (4%)
- Black (4%)
- Indigenous (4%)
- Other (13%)

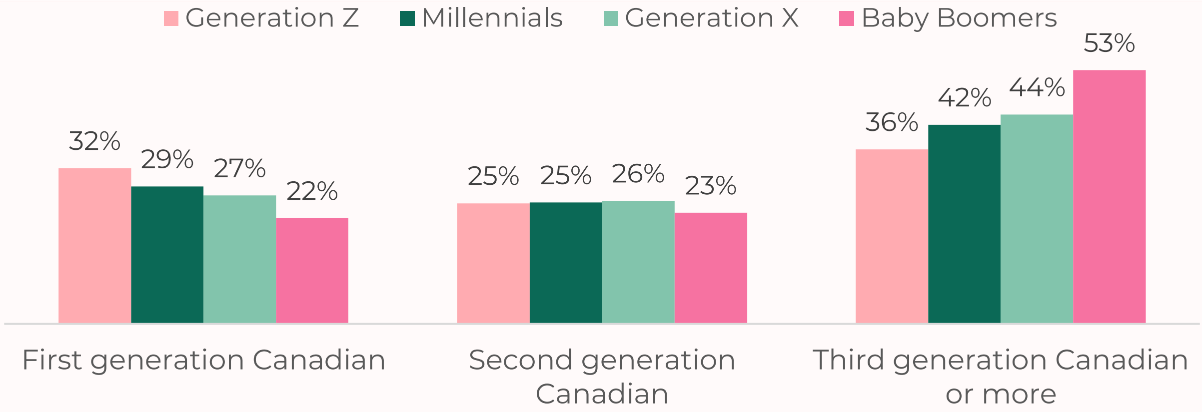
- White (83%)
- Chinese (5%)
- Other (14%)

VISIBLE MINORITY
% Yes

49%	Generation Z
31%	Millennials
25%	Generation X
14%	Baby Boomers

Born in Canada
% Yes

83%	Generation Z
80%	Millennials
76%	Generation X
78%	Baby Boomers



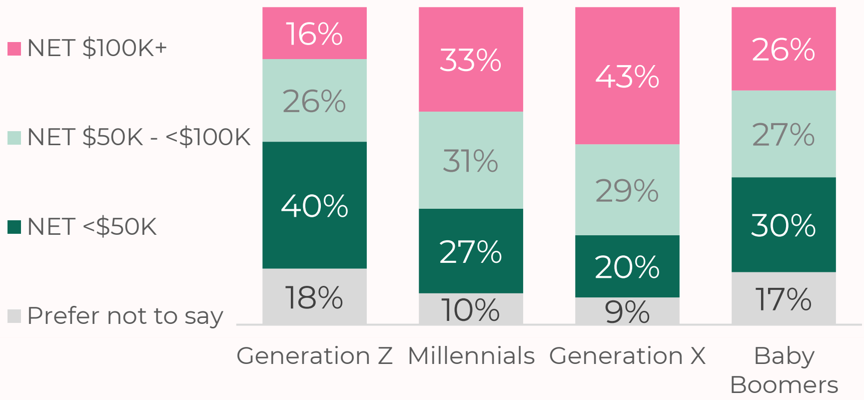
Base: OLG Players (n=3,850)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)? X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

Demographic Profile

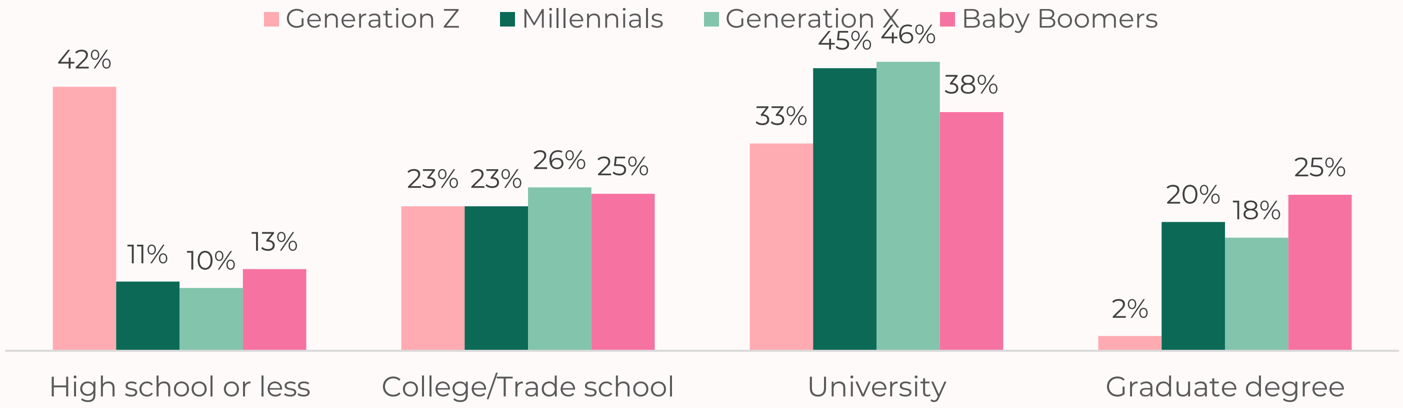
Similar to OLG players, among OLG non-players, Millennials have the highest income and education, followed by Gen X.

OLG Non-Players by Generation

INCOME



EDUCATION



People in Household

	Generation Z	Millennials	Generation X	Baby Boomers
Live alone	10%	20%	24%	32%
Two people	19%	28%	30%	50%
Three people	20%	26%	16%	9%
Four people	26%	18%	18%	8%
Five or more	24%	9%	12%	2%

Kids in Household % Yes

32%	Generation Z
37%	Millennials
31%	Generation X
4%	Baby Boomers

Marital Status

	Generation Z	Millennials	Generation X	Baby Boomers
Married/ Common-law	12%	55%	65%	59%
Single, never married	87%	41%	27%	18%
Separated/ Divorced	0%	4%	6%	13%
Widowed	0%	0%	0%	11%

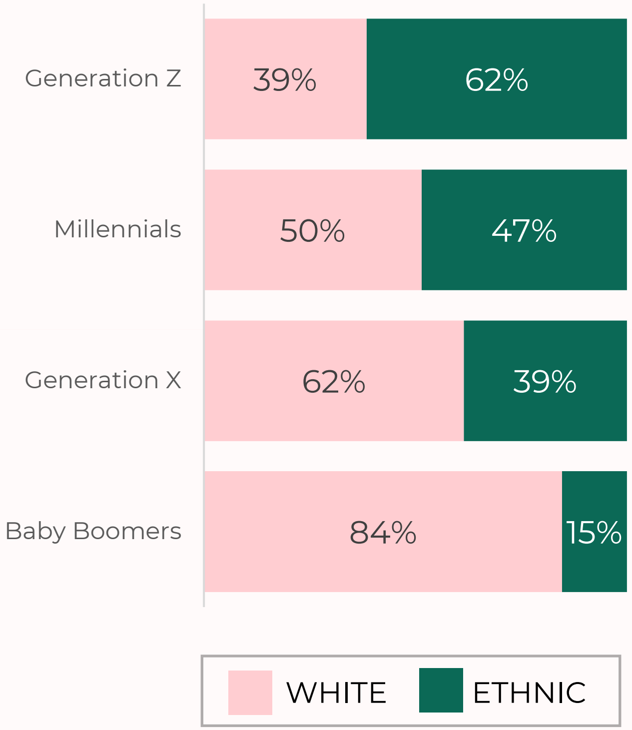
Base: OLG Non-Players (n=1,311)
X1 What is the highest level of education that you completed? X2 Which of the following ranges best describes your total annual household income before taxes for 2021? X6 Are any of those other members of your household under the age of 18? X7. What is your current marital status?

Demographic Profile

When it comes to ethnic or racial diversity, similar to players Gen Z non-players are the most diverse generation.

OLG Non-Players by Generation

ETHNIC BACKGROUND



- White (39%)
- South Asian (18%)
- Black (15%)
- Chinese (7%)
- Other (25%)

- White (50%)
- Chinese (13%)
- South Asian (9%)
- Black (7%)
- Other (13%)

- White (62%)
- Chinese (12%)
- South Asian (7%)
- Black (7%)
- Other (15%)

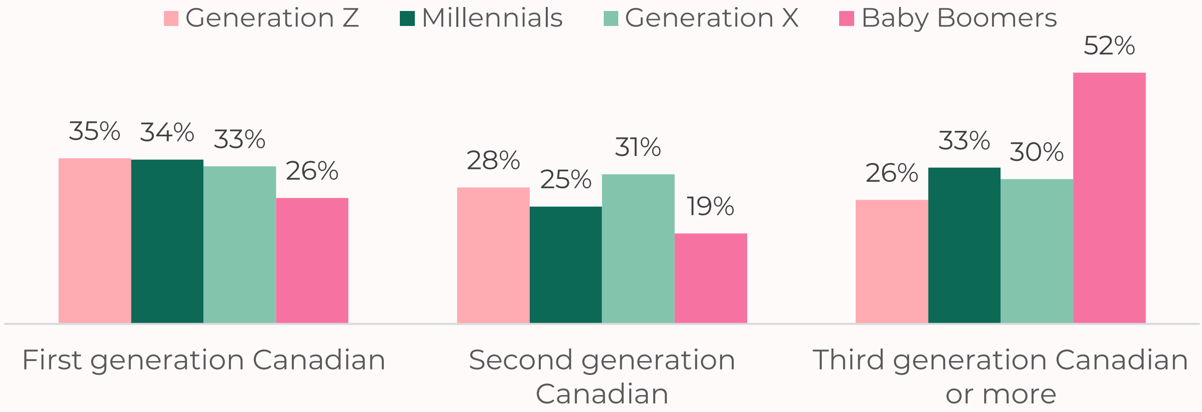
- White (84%)
- Chinese (9%)
- Other (6%)

VISIBLE MINORITY
% Yes

47%	Generation Z
35%	Millennials
30%	Generation X
14%	Baby Boomers

Born in Canada
% Yes

64%	Generation Z
63%	Millennials
70%	Generation X
75%	Baby Boomers



Base: OLG Non-Players (n=1,311)
X3. What is your own ethnic or racial background? X4 Would you say you are a member of a visible minority here in Canada (in terms of your ethnicity/race)?
X4b Were you born inside or outside of Canada? X4c What best describes your immigration/generation status in Canada?

GENERATIONAL PERSPECTIVE

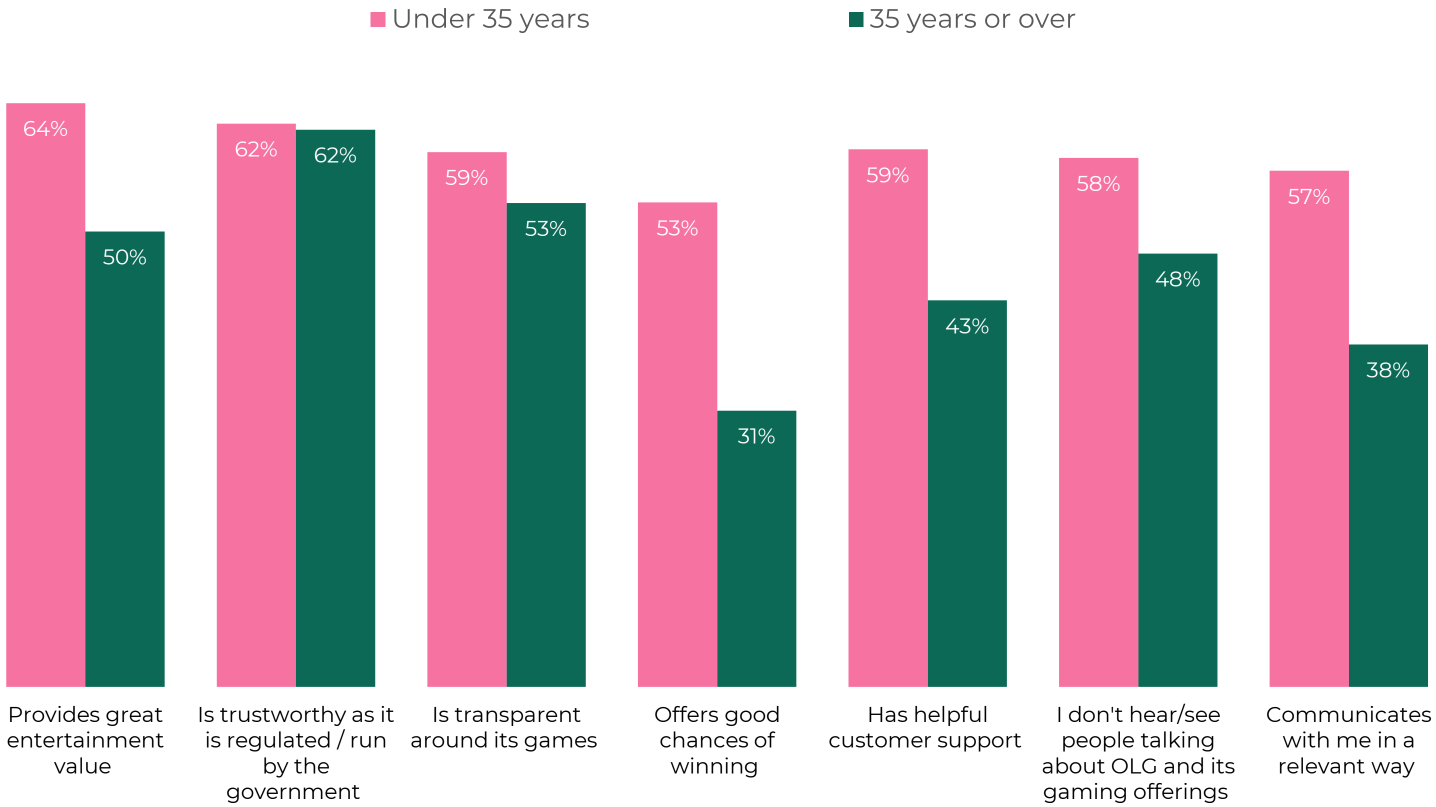
Perceptions about OLG

This section aims to unveil the perceptions and attitudes towards OLG and its gaming offerings by each generation.

OLG Gaming Perceptions

% Strongly Agree
(Top 3 Box, rated 5 to 7)

TOTAL



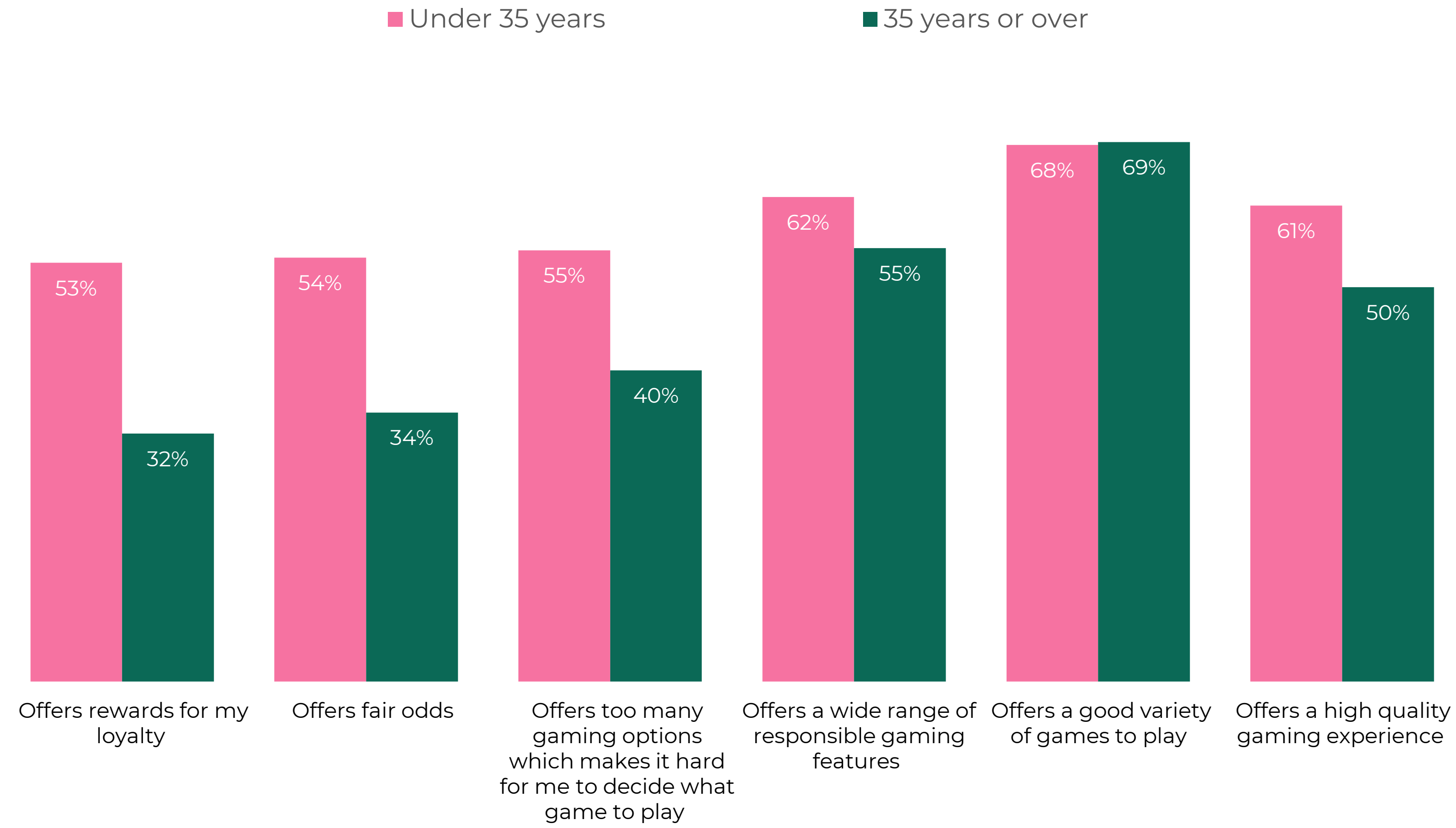
The U35 age group generally holds favorable perceptions about OLG. In particular, when it comes to transparency, the customer support, chance of winning, entertainment value and relevant communication, this is viewed more favourably by the younger generations compared to the older cohorts.

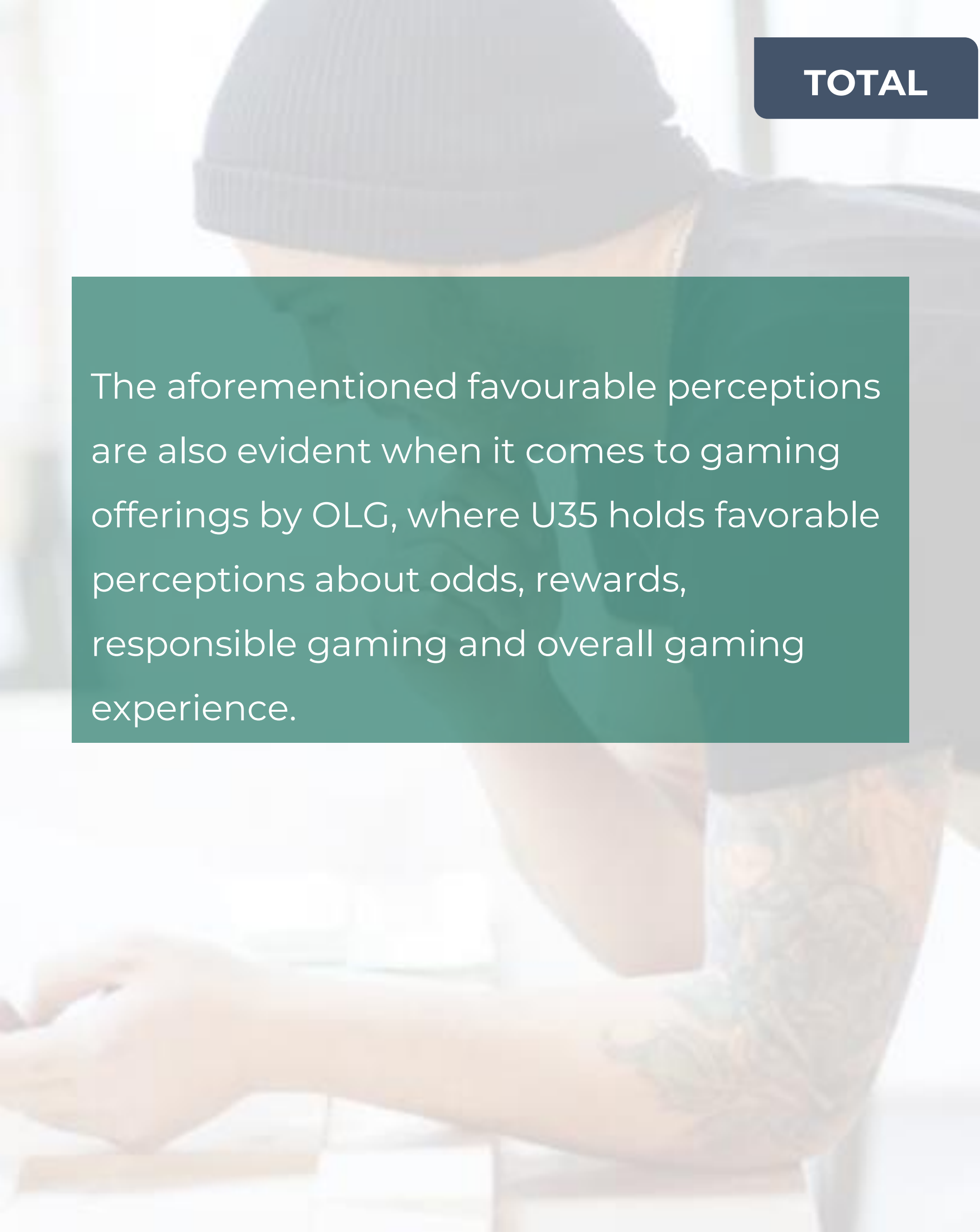
Base: All respondents (n=5,161)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions

% Strongly Agree
(Top 3 Box, rated 5 to 7)

TOTAL





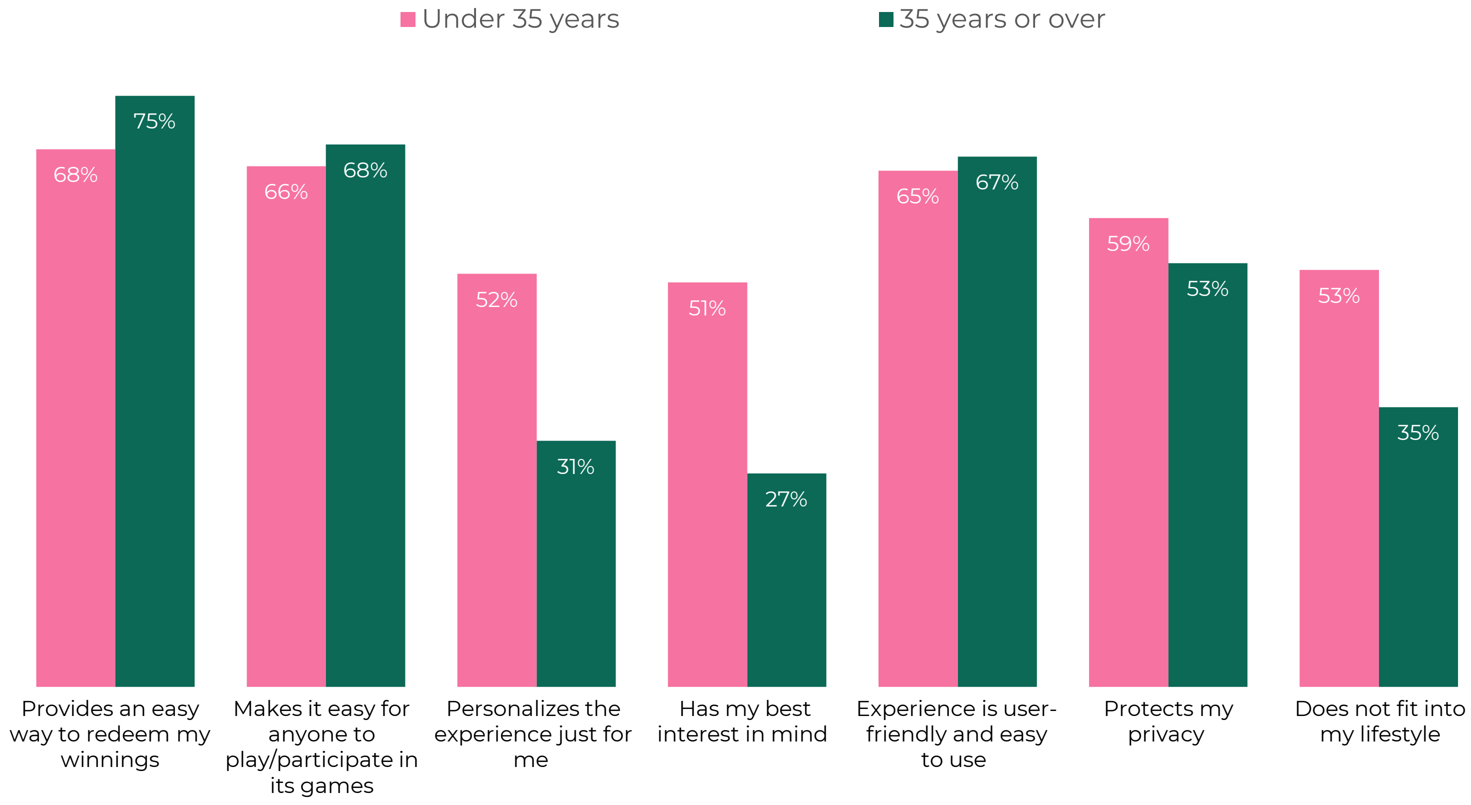
The aforementioned favourable perceptions are also evident when it comes to gaming offerings by OLG, where U35 holds favorable perceptions about odds, rewards, responsible gaming and overall gaming experience.

Base: All respondents (n=5,161)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions

% Strongly Agree
(Top 3 Box, rated 5 to 7)

TOTAL



U35 generally hold favorable perceptions about OLG gaming offerings. In particular, when it comes to the gaming experience, gaming variety, odds, chance of winning and entertainment value, this is viewed more favourably by the younger generations compared to the older cohorts.

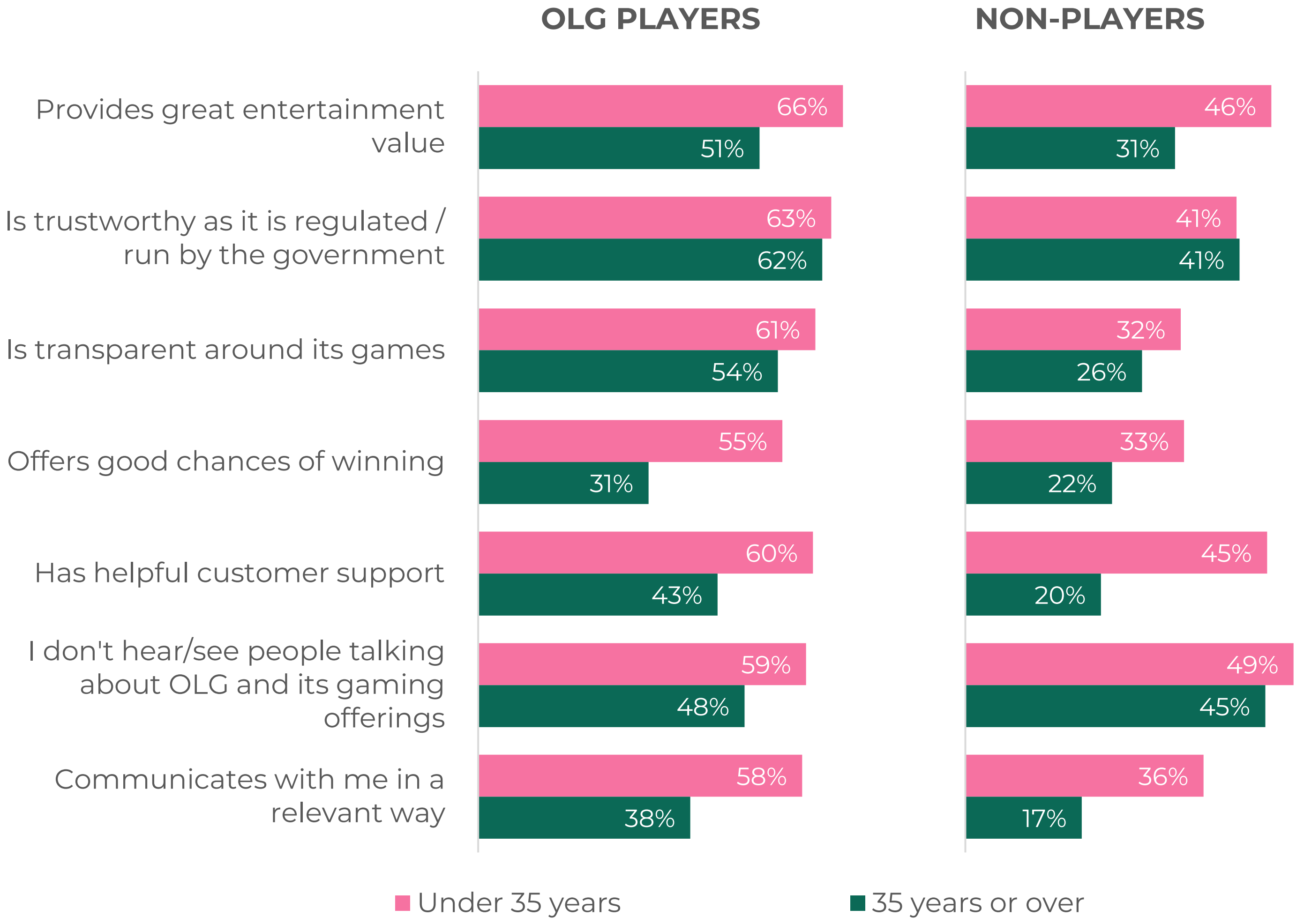
In addition, U35 views OLG positively when it comes to transparency and safeguarding information privacy, more so than the older generations.

Base: All respondents (n=5,161)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG PLAYERS V. NON-PLAYERS



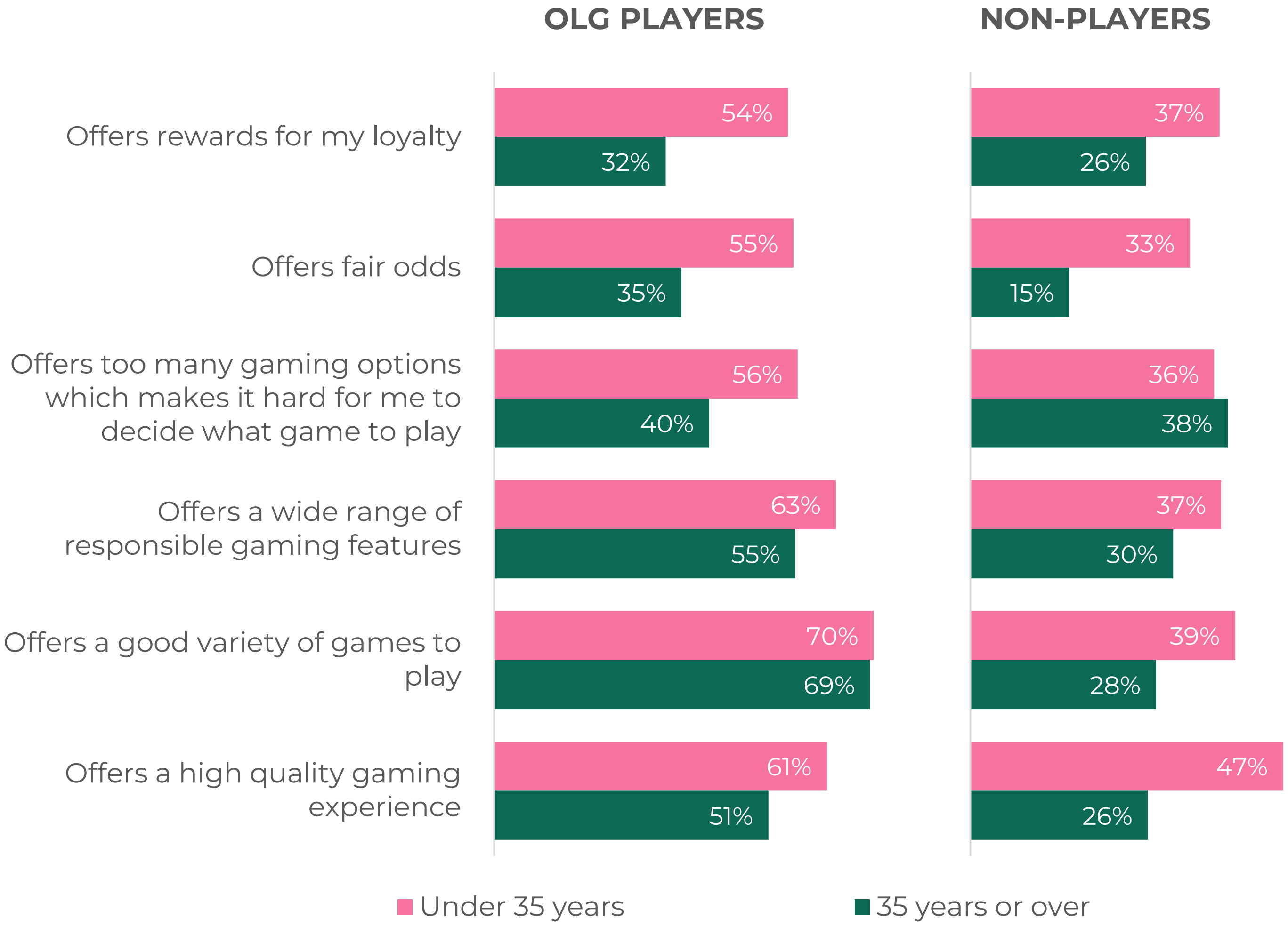
Generally, OLG players hold more favourable perceptions about OLG gaming than non-players. This is perhaps expected due to their engagement with the offering. Interestingly, the younger age group is more positive towards OLG offerings, and in particular when it comes to the gaming experience, transparency, chance of winning and entertainment value.

Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions *(cont'd)*

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG PLAYERS V. NON-PLAYERS



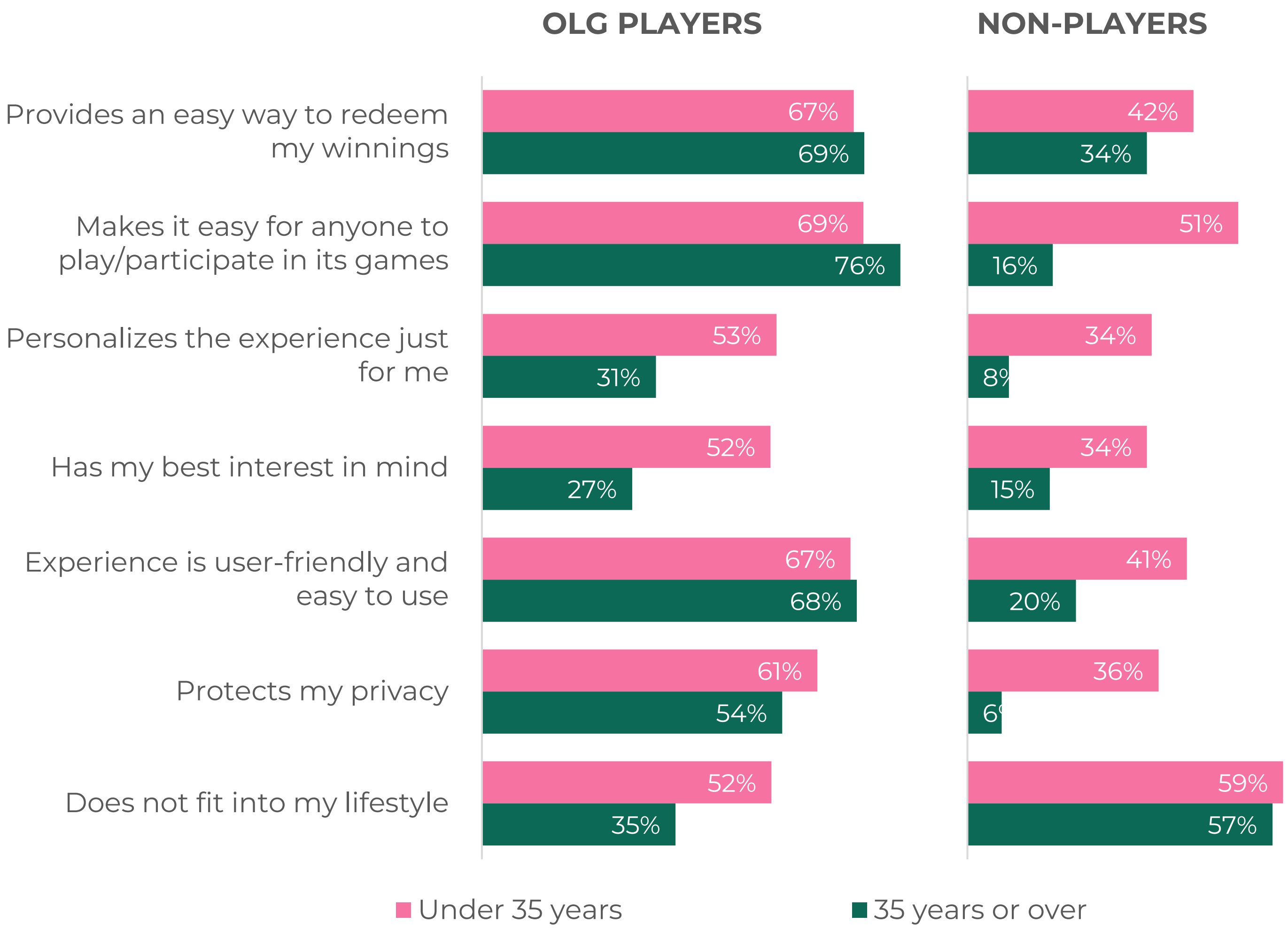
Again, the younger age group holds more favorable perceptions about OLG gaming offerings than the O35 age group and this is evident across both players and non-players.

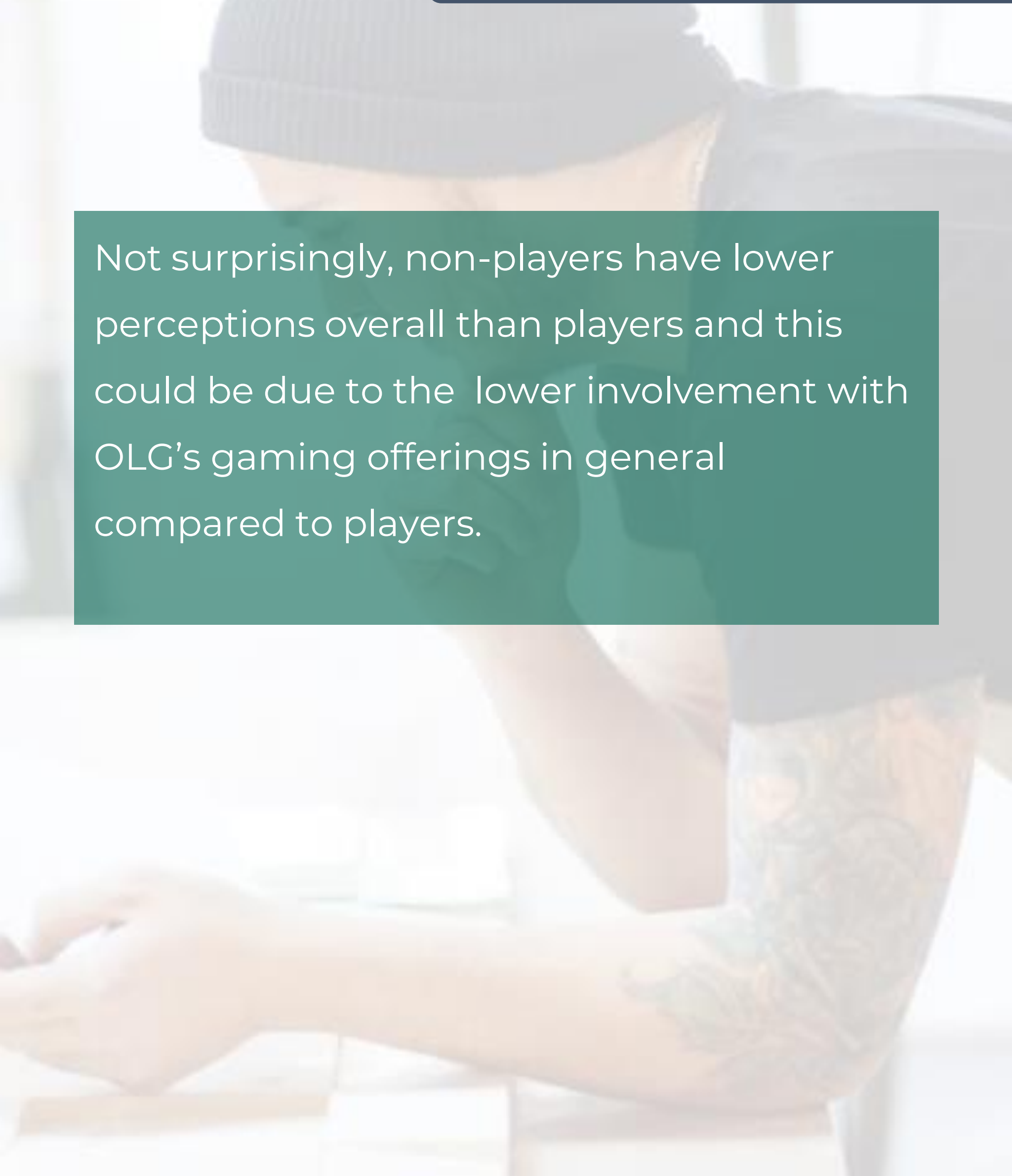
Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions *(cont'd)*

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG PLAYERS V. NON-PLAYERS





Not surprisingly, non-players have lower perceptions overall than players and this could be due to the lower involvement with OLG's gaming offerings in general compared to players.

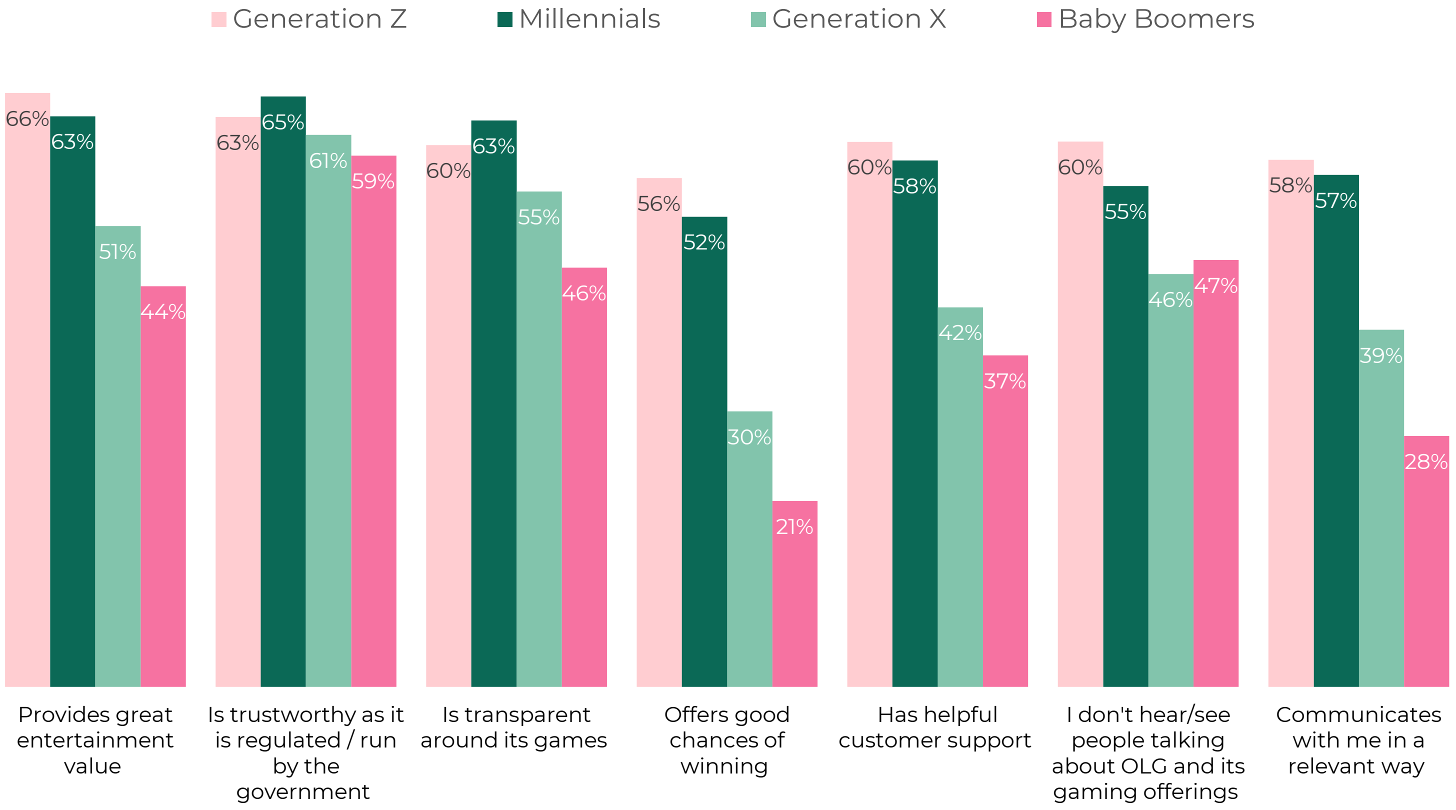
Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

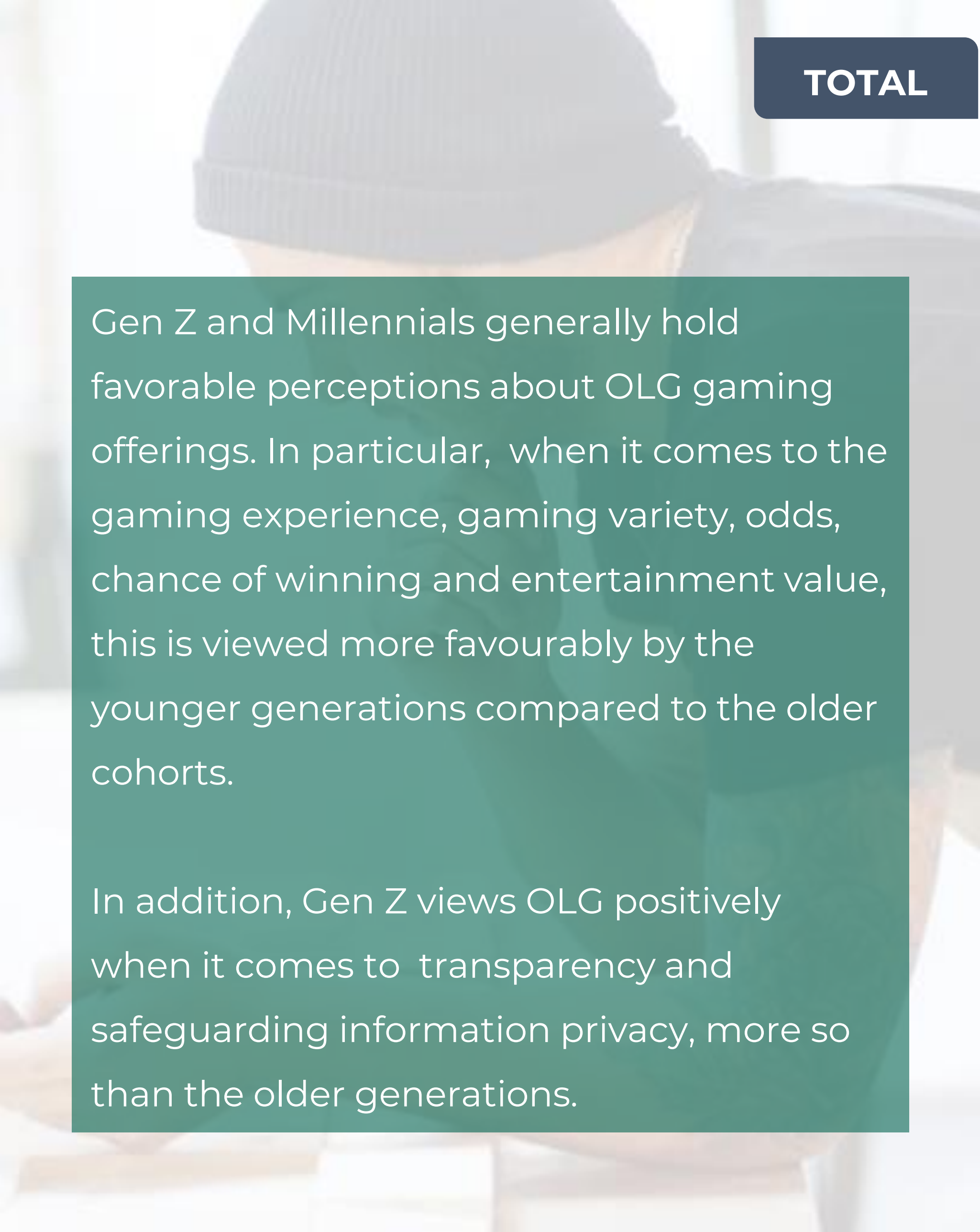
OLG Gaming Perceptions

updated

TOTAL

% Strongly Agree
(Top 3 Box, rated 5 to 7)





Gen Z and Millennials generally hold favorable perceptions about OLG gaming offerings. In particular, when it comes to the gaming experience, gaming variety, odds, chance of winning and entertainment value, this is viewed more favourably by the younger generations compared to the older cohorts.

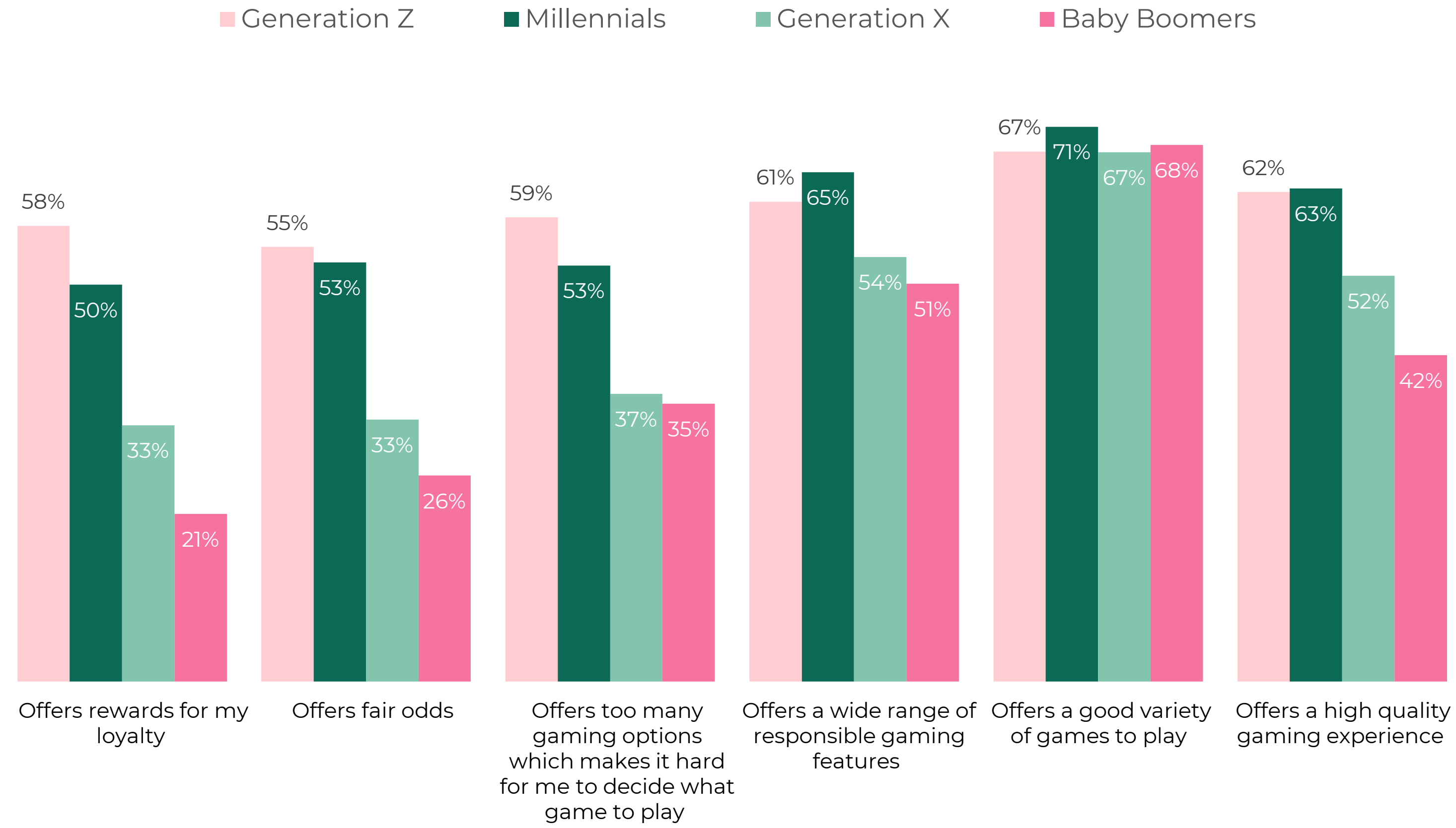
In addition, Gen Z views OLG positively when it comes to transparency and safeguarding information privacy, more so than the older generations.

Base: All respondents (n=5,161)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions *(cont'd)*

TOTAL

% Strongly Agree
(Top 3 Box, rated 5 to 7)



	Generation Z	Millennials	Generation X	Baby Boomers
Offers rewards for my loyalty	58%	50%	33%	21%
Offers fair odds	55%	53%	33%	26%
Offers too many gaming options which makes it hard for me to decide what game to play	59%	53%	37%	35%
Offers a wide range of responsible gaming features	61%	65%	54%	51%
Offers a good variety of games to play	67%	71%	67%	68%
Offers a high quality gaming experience	62%	63%	52%	42%

Gen Z and Millennials generally hold favorable perceptions about OLG gaming offerings. In particular, when it comes to the gaming experience, gaming variety, odds, chance of winning and entertainment value, this is viewed more favourably by the younger generations compared to the older cohorts.

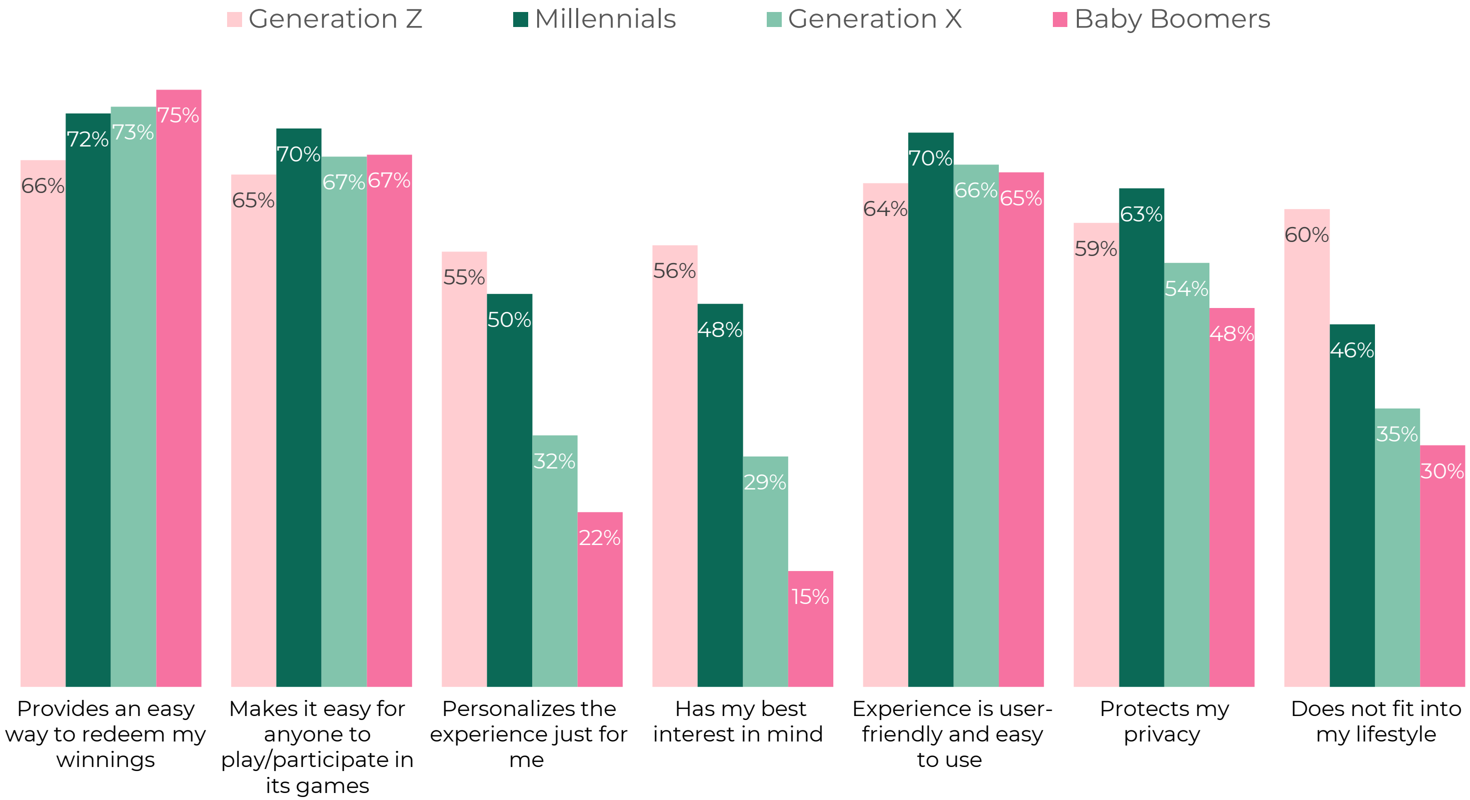
In addition, Gen Z views OLG positively when it comes to transparency and safeguarding information privacy, more so than the older generations.

Base: All respondents (n=5,161)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions *(cont'd)*

TOTAL

% Strongly Agree
(Top 3 Box, rated 5 to 7)



Gen Z and Millennials generally hold favorable perceptions about OLG gaming offerings. In particular, when it comes to the gaming experience, gaming variety, odds, chance of winning and entertainment value, this is viewed more favourably by the younger generations compared to the older cohorts.

In addition, Gen Z views OLG positively when it comes to transparency and safeguarding information privacy, more so than the older generations.

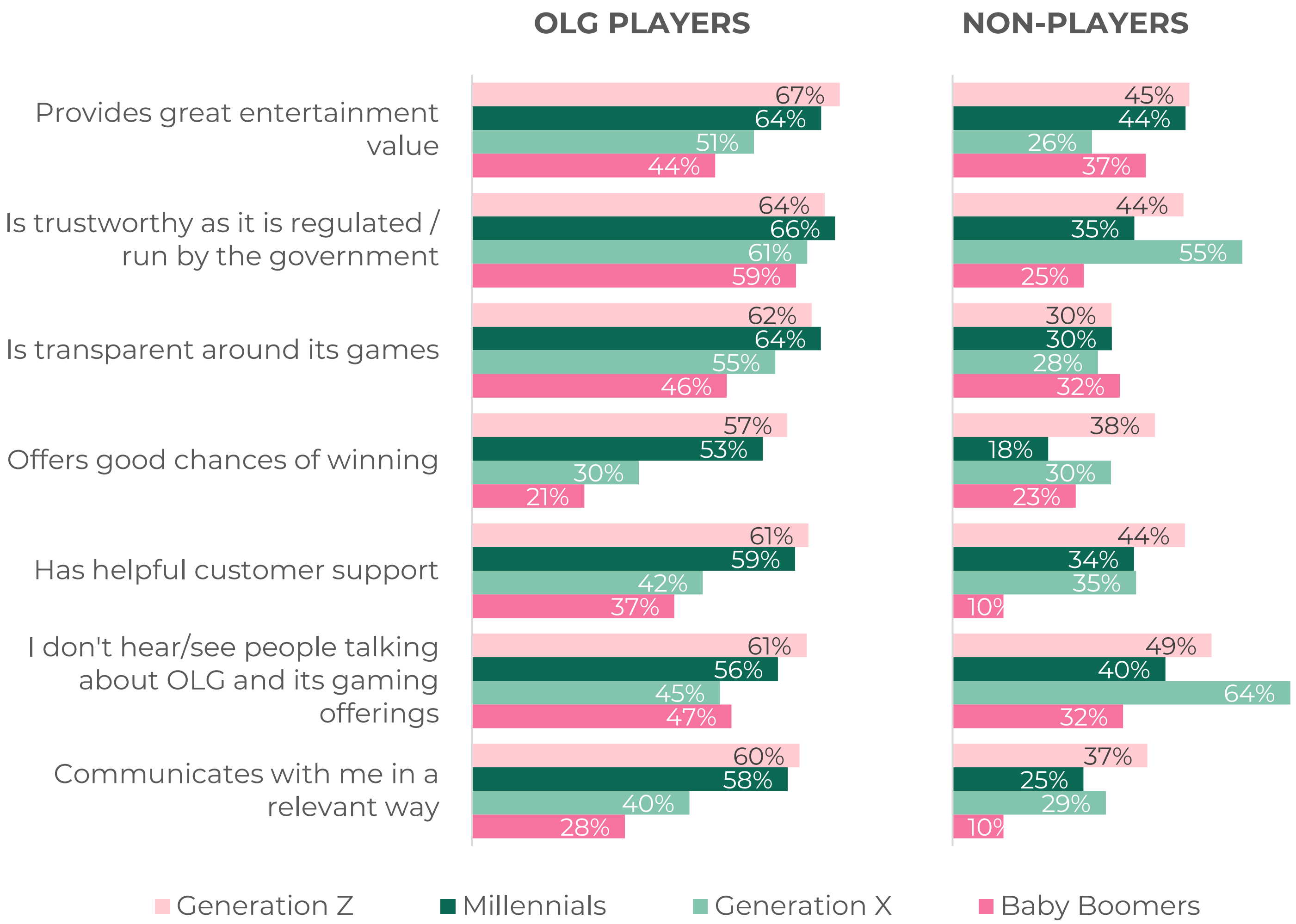
Base: All respondents (n=5,161)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

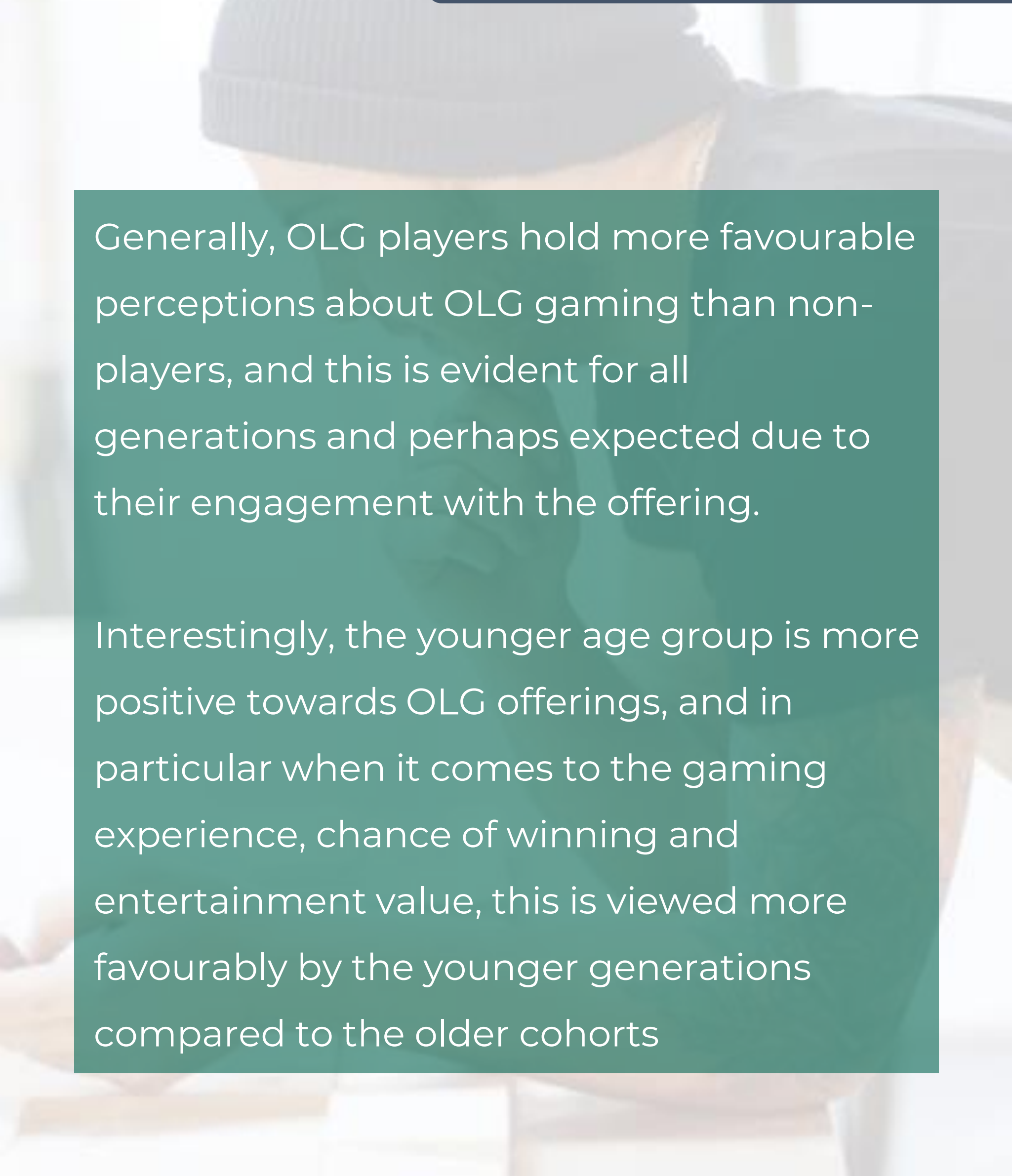
OLG Gaming Perceptions

updated

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG PLAYERS V. NON-PLAYERS





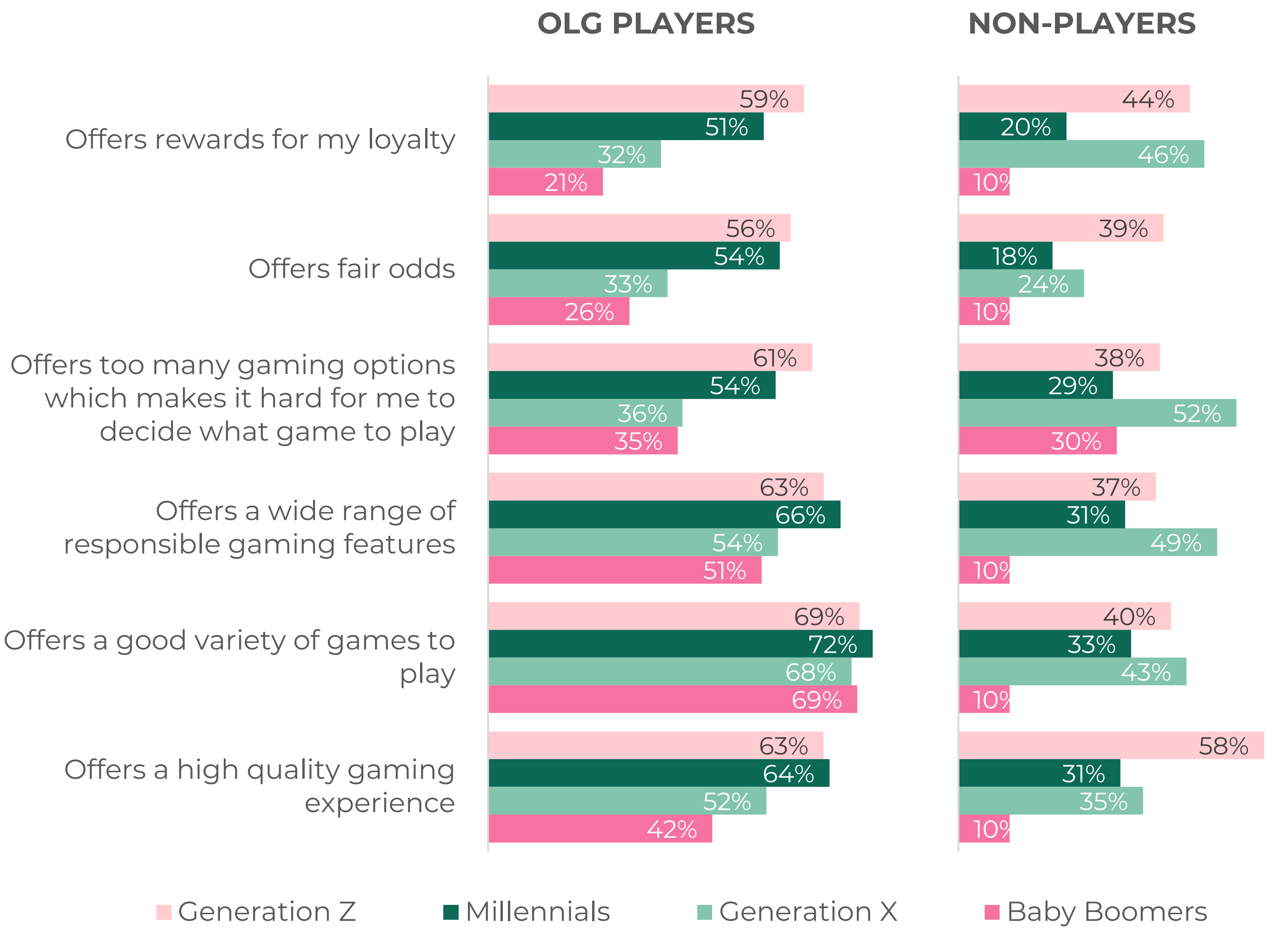
Generally, OLG players hold more favourable perceptions about OLG gaming than non-players, and this is evident for all generations and perhaps expected due to their engagement with the offering.

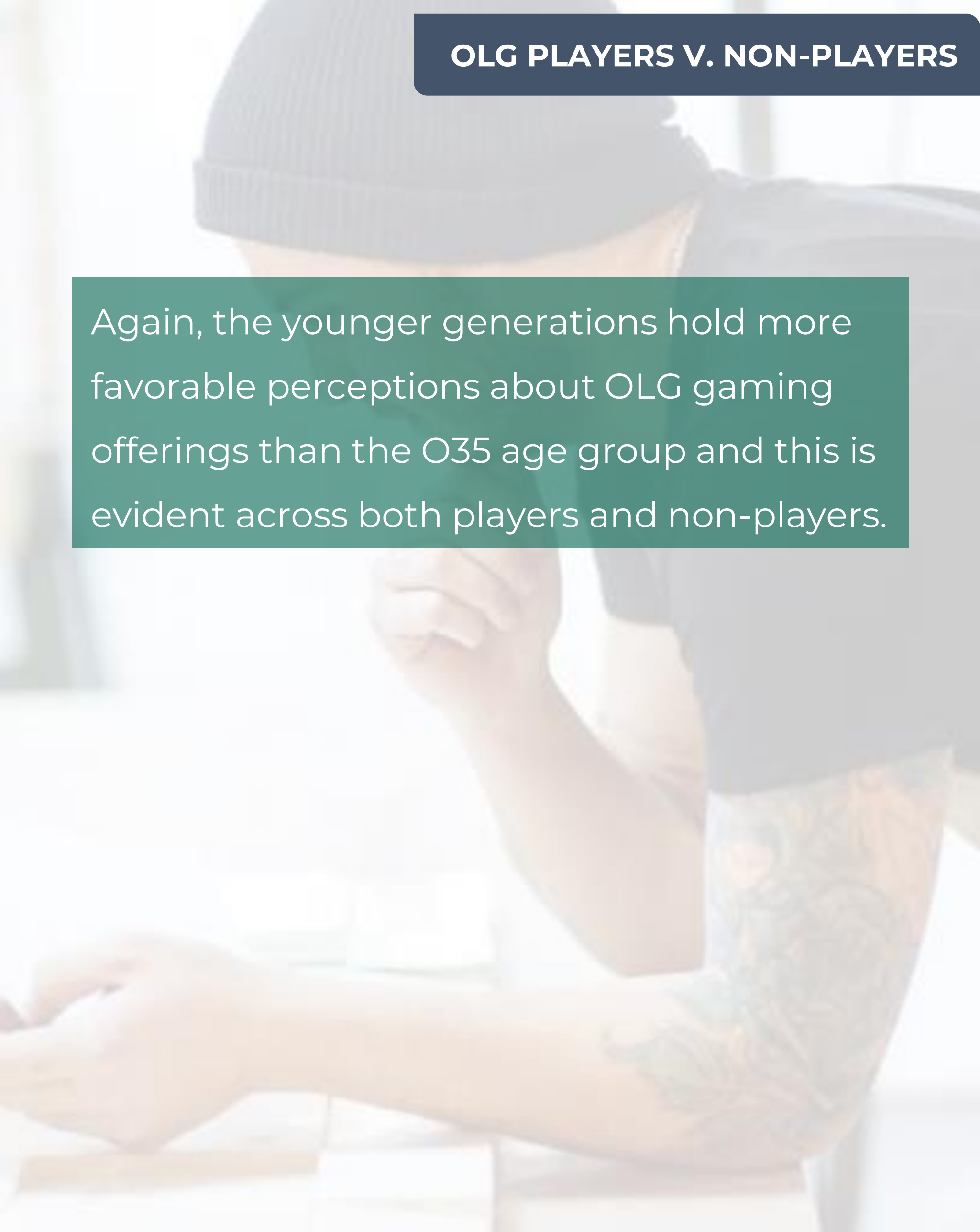
Interestingly, the younger age group is more positive towards OLG offerings, and in particular when it comes to the gaming experience, chance of winning and entertainment value, this is viewed more favourably by the younger generations compared to the older cohorts

Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Gaming Perceptions *(cont'd)*

% Strongly Agree
(Top 3 Box, rated 5 to 7)





OLG PLAYERS V. NON-PLAYERS

Again, the younger generations hold more favorable perceptions about OLG gaming offerings than the O35 age group and this is evident across both players and non-players.

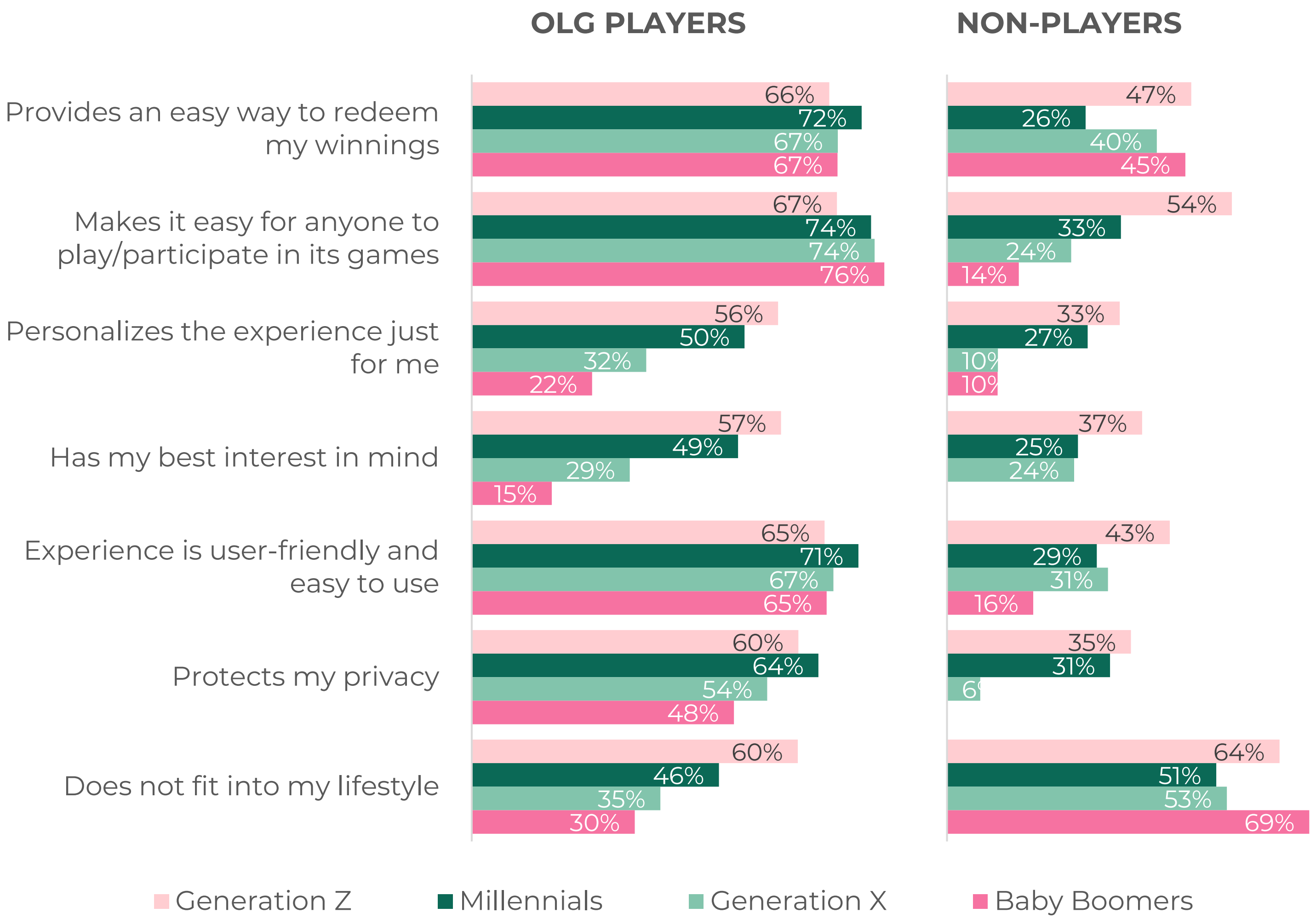
Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG UNITY INSIGHTS

OLG Gaming Perceptions *(cont'd)*

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG PLAYERS V. NON-PLAYERS

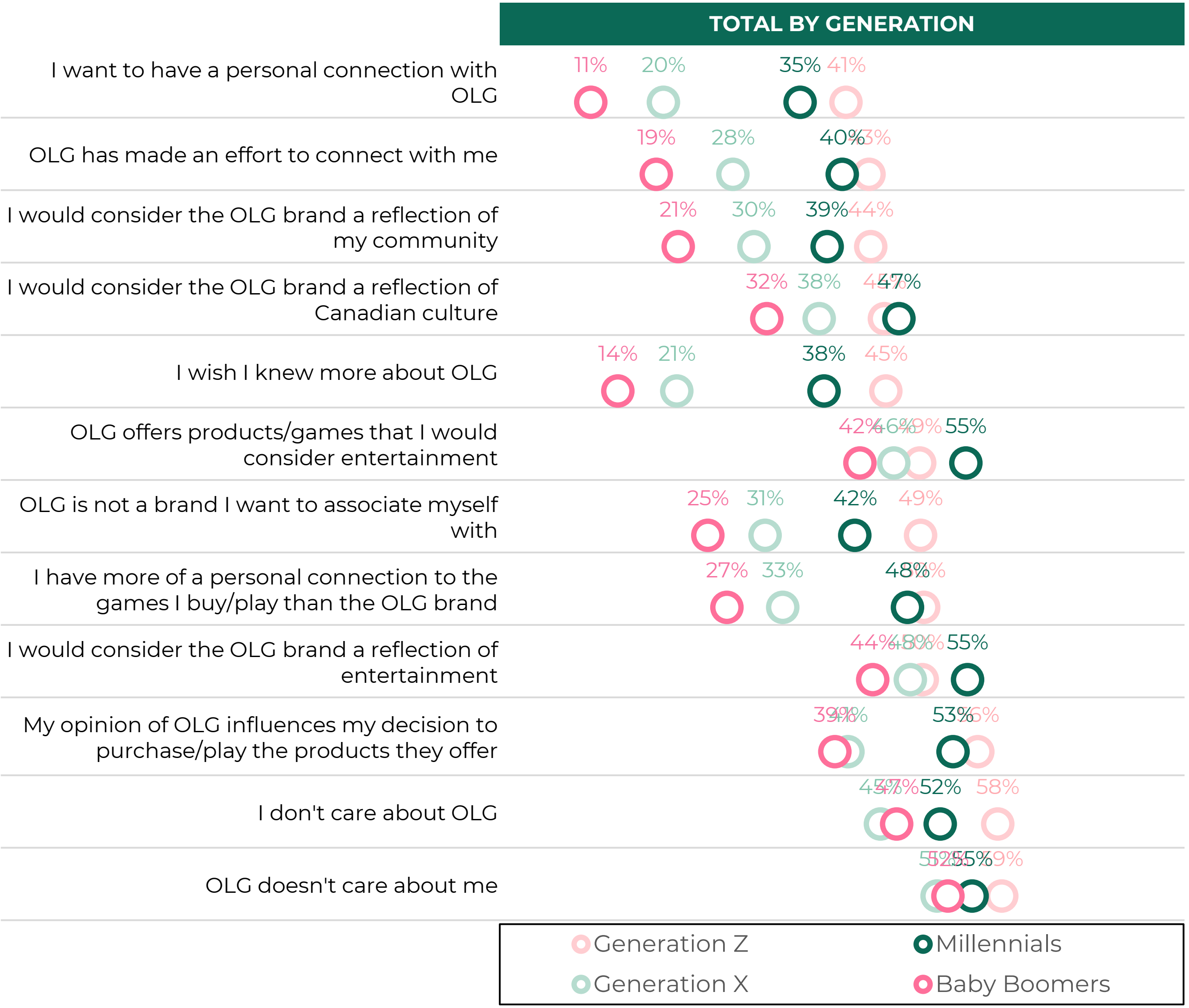


Not surprisingly, non-players have lower perceptions overall than players and this could be due to the lower involvement with OLG's gaming offerings in general compared to players.

Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C5 Please rate your level of agreement with each of the statements below when thinking about the last time you participated in OLG gaming activities, regardless of whether you won or lost?

OLG Brand Perceptions

% Strongly Agree
(Top 3 Box, rated 5 to 7)



Base: All respondents (n=5,161)
C6 Thinking about OLG the brand, how would you rate the following attributes?

TOTAL

Opportunity for the OLG brand: Relevance and Connection

When it comes to the OLG brand, there does not seem to be a strong connection and personal relevance towards the OLG corporate brand, particularly among Gen Z. In terms of connection, only about 4 in 10 of Gen Z want to have a connection to OLG, feel that OLG reflects their community and only half want to associate themselves with the OLG brand.

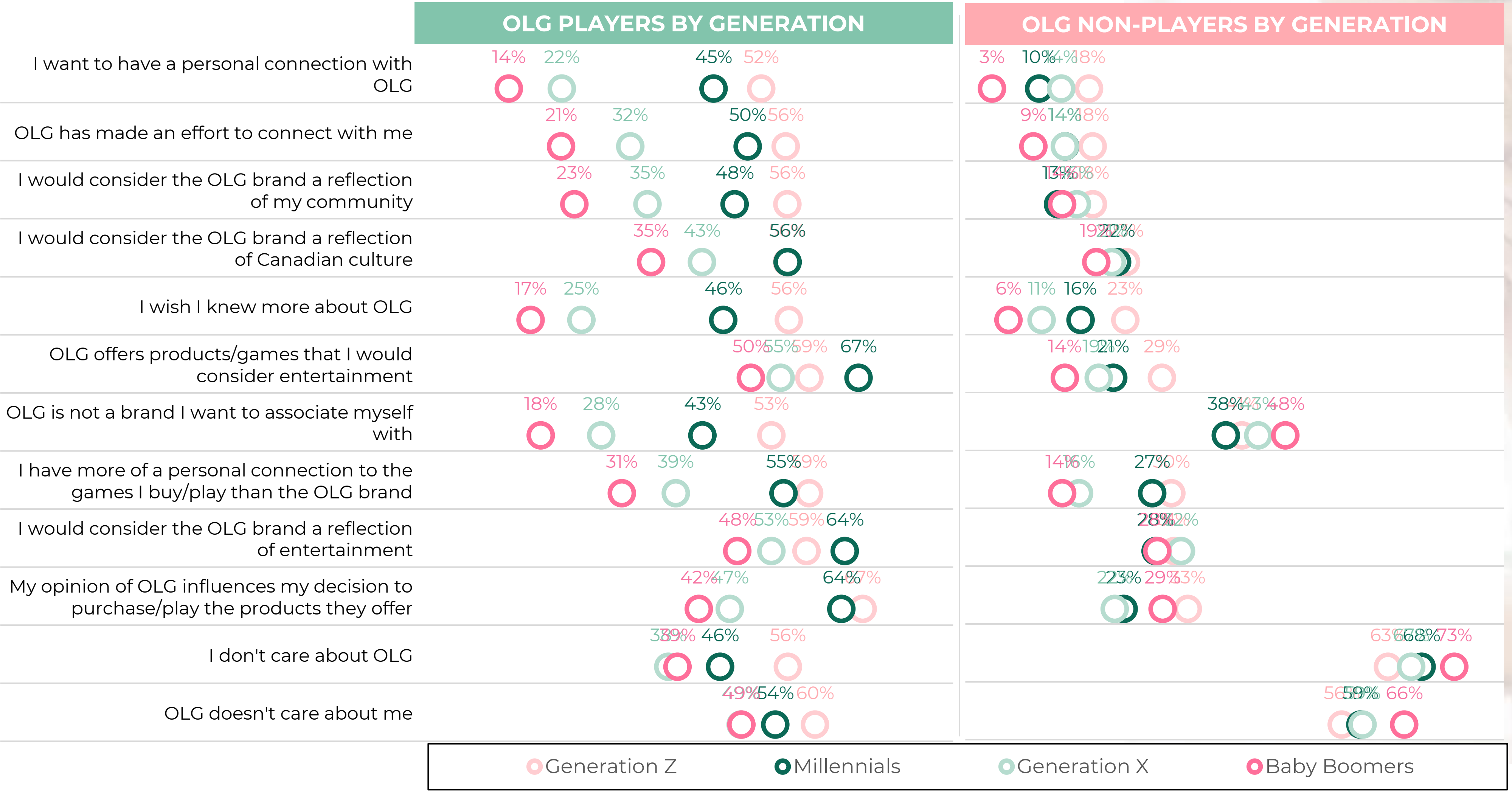
In terms of relevance, 6 in 10 among Gen Z feel that OLG does not care about them and in return, 6 in 10 do not care about OLG.

OLG Brand Perceptions

OLG PLAYERS V. NON-PLAYERS

% Strongly Agree
(Top 3 Box, rated 5 to 7)

OLG non-players have generally lower perceptions about the OLG brand and this is evident across all generations.



Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
C6 Thinking about OLG the brand, how would you rate the following attributes?

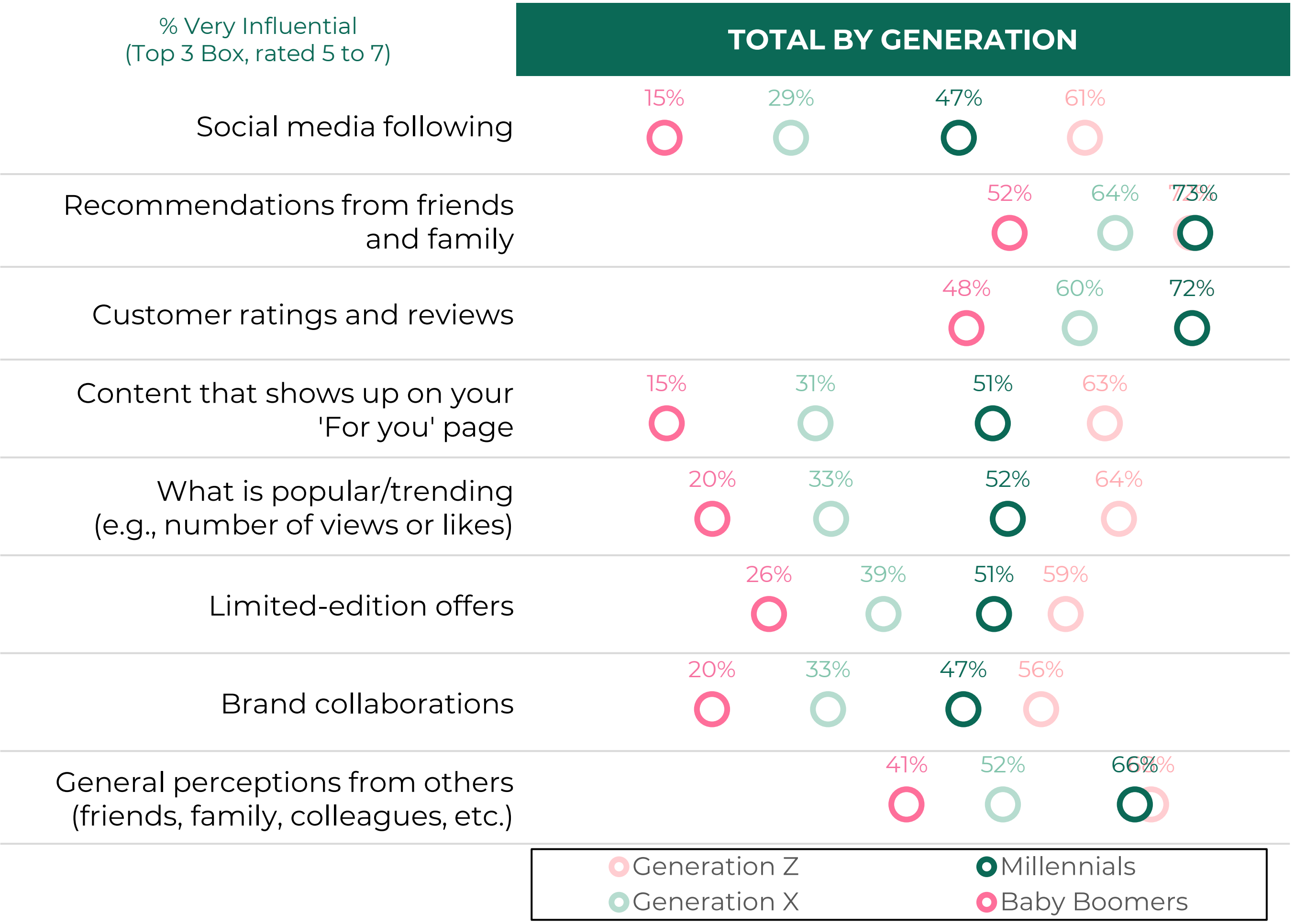
GENERATIONAL PERSPECTIVE

ENTERTAINMENT

The goal of this section is to offer insights into how generations approach entertainment. It seeks to provide a distinct perspective on the emotional and rational triggers that drive their decisions.

Influencers on Entertainment Decisions

TOTAL



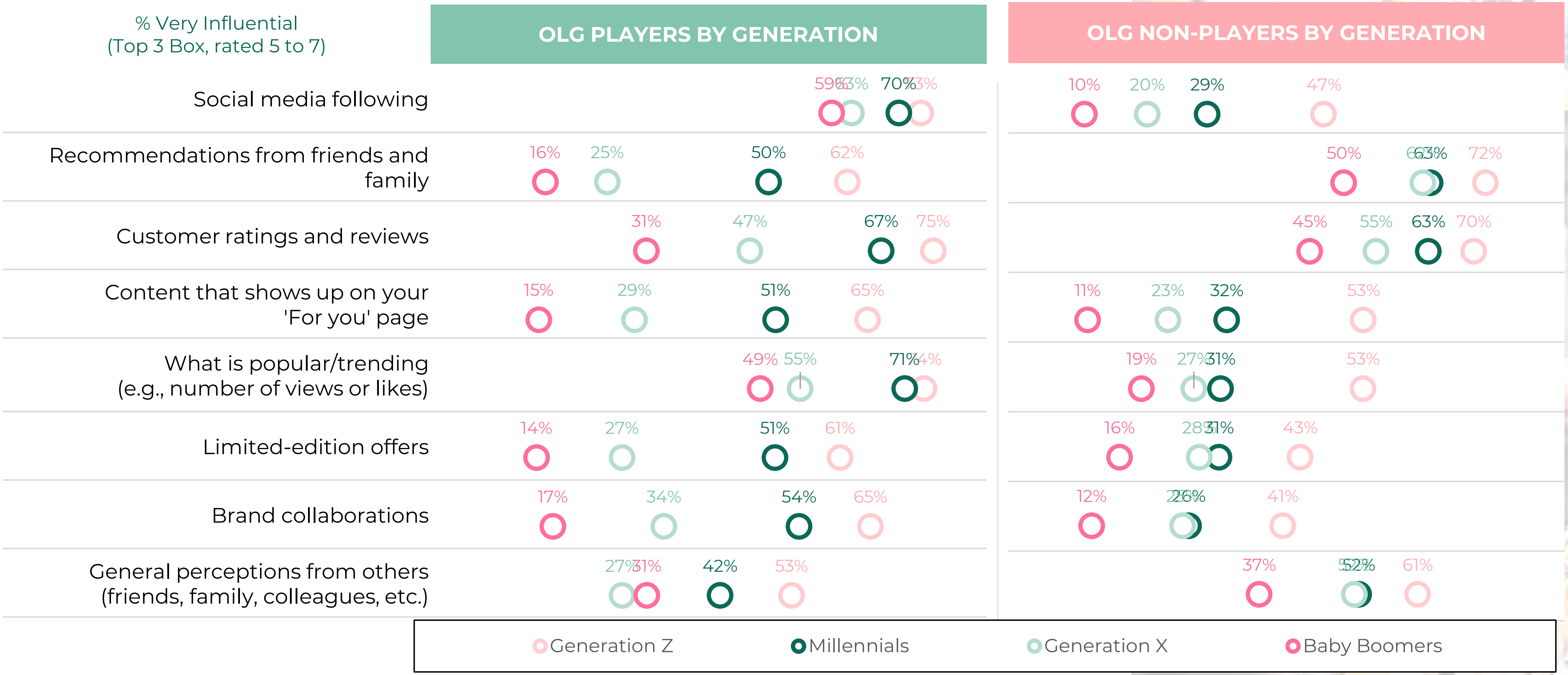
Perhaps not surprisingly, Gen Z and Millennials are most influenced by external factors, such as friends, social media, followers, and more.

Base: All respondents (n=5,161)
E3 How influential to your decision to find out, or trial, new leisure or entertainment products/brands are the following ?

Influencers on Entertainment Decisions

OLG PLAYERS V. NON-PLAYERS

External influencers play a role in new entertainment decisions for both players and non-players. However, non-players t
younger seem somewhat more independent and less reliant on pop culture, social media, reviews/ratings and recommendations from others than the younger player generations.



Base: OLG Players (n=3,850), OLG Non-Players (n=1,311)
E3 How influential to your decision to find out, or trial, new leisure or entertainment products/brands are the following ?

Top Entertainment Activities: Generation

TOTAL

Generation Z

ENTERTAINMENT ACTIVITY	P6M %
Watching TV/movies at home via streaming	94%
Pay to receive wellness services	92%
Watching cable or PVR TV	92%
Streaming online music	91%
Reading books/ebooks, listening to audio books/podcasts	89%
Visiting an entertainment complex	87%
Review information online	83%
Going to a fitness class or gym	83%
Smoking or consuming recreational marijuana	82%
Participating in a virtual athletic activity/ exercise	82%
Browsing social media	81%
Going to a live sporting event	81%
Smoking cigarettes	79%
Vaping	78%

Millennials

ENTERTAINMENT ACTIVITY	P6M %
Watching cable or PVR TV	92%
Watching TV/movies at home via streaming	91%
Pay to receive wellness services	91%
Streaming online music	91%
Reading books/ebooks, listening to audio books/podcasts	89%
Visiting an entertainment complex	86%
Going to a fitness class or gym	81%
Participating in a virtual athletic activity/ exercise	81%
Hosting or attending dinner parties	80%
Review information online	79%
Going to a live sporting event	76%
Smoking or consuming recreational marijuana	73%
Browsing social media	72%

Generation X

ENTERTAINMENT ACTIVITY	P6M %
Streaming online music	87%
Watching cable or PVR TV	87%
Reading books/ebooks, listening to audio books/podcasts	87%
Watching TV/movies at home via streaming	85%
Visiting an entertainment complex	81%
Hosting or attending dinner parties	76%
Pay to receive wellness services	75%
Participating in a virtual athletic activity/ exercise	72%
Going to a fitness class or gym	72%
Participate in extreme sports/activities	67%
Review information online	65%
Going to a live sporting event	65%
Drinking alcoholic beverages	57%

Baby Boomers

ENTERTAINMENT ACTIVITY	P6M %
Streaming online music	85%
Reading books/ebooks, listening to audio books/podcasts	80%
Hosting or attending dinner parties	77%
Visiting an entertainment complex	75%
Participate in extreme sports/activities	71%
Participating in a virtual athletic activity/ exercise	71%
Watching TV/movies at home via streaming	71%
Watching cable or PVR TV	70%
Going to a live sporting event	62%
Going to a fitness class or gym	61%
Pay to receive wellness services	55%

Base: All respondents (n=5,161)
A1 - When was the last time you participated in each of the following activities?

Top Entertainment Activities: Generation

OLG PLAYERS

Generation Z

ENTERTAINMENT ACTIVITY	P6M %
✓ Browsing social media	93%
✓ Streaming online music	93%
✓ Watching TV/movies at home via streaming	92%
✓ Going out to a restaurant	92%
✓ Shopping for non-essentials	90%
✓ Going out to a coffee shop	90%
✓ Hosting or attending dinner parties	87%
✓ Review information online	87%
✓ Play free games on PC, console, VR	87%
✓ Play free games on mobile	87%
✓ Playing board games or card games	86%
✓ Trying a new restaurant	86%
✓ Reading books/ebooks, listening to audio books/podcasts	86%
✓ Vaping	78%

Millennials

ENTERTAINMENT ACTIVITY	P6M %
✓ Watching TV/movies at home via streaming	94%
✓ Streaming online music	93%
✓ Going out to a restaurant	93%
✓ Browsing social media	93%
✓ Shopping for non-essentials	92%
✓ Going out to a coffee shop	88%
✓ Drinking alcoholic beverages	86%
✓ Trying a new restaurant	85%
✓ Review information online	84%
✓ Reading books/ebooks, listening to audio books/podcasts	83%
✓ Hosting or attending dinner parties	81%
✓ Play free games on mobile	80%
✓ Playing board games or card games	79%

Generation X

ENTERTAINMENT ACTIVITY	P6M %
✓ Going out to a restaurant	90%
✓ Shopping for non-essentials	89%
✓ Watching TV/movies at home via streaming	89%
✓ Browsing social media	87%
✓ Going out to a coffee shop	84%
✓ Drinking alcoholic beverages	81%
✓ Streaming online music	78%
✓ Reading books/ebooks, listening to audio books/podcasts	75%
✓ Trying a new restaurant	73%
✓ Watching cable or PVR TV	71%
✓ Hosting or attending dinner parties	68%
✓ Review information online	66%

Baby Boomers

ENTERTAINMENT ACTIVITY	P6M %
✓ Going out to a restaurant	87%
✓ Shopping for non-essentials	83%
✓ Drinking alcoholic beverages	80%
✓ Going out to a coffee shop	79%
✓ Watching cable or PVR TV	74%
✓ Browsing social media	73%
✓ Watching TV/movies at home via streaming	72%
✓ Reading books/ebooks, listening to audio books/podcasts	71%
✓ Hosting or attending dinner parties	63%
✓ Trying a new restaurant	62%
✓ Streaming online music	57%
✓ Going out to a bar, pub or brewery	52%
✓ Playing board games or card games	50%

Base: OLG Players (n=3,850)
A1 - When was the last time you participated in each of the following activities?

Top Entertainment Activities: Generation

OLG NON-PLAYERS

Generation Z

ENTERTAINMENT ACTIVITY	P6M %
✓ Browsing social media	94%
✓ Streaming online music	92%
✓ Watching TV/movies at home via streaming	92%
✓ Going out to a restaurant	89%
✓ Shopping for non-essentials	86%
✓ Going out to a coffee shop	79%
✓ Trying a new restaurant	76%
✓ Review information online	76%
✓ Reading books/ebooks, listening to audio books/podcasts	76%
✓ Play free games on mobile	73%
✓ Playing board games or card games	70%
✓ Going to the cinema/movie theatre/drive-In	68%
✓ Hosting or attending dinner parties	68%

Millennials

ENTERTAINMENT ACTIVITY	P6M %
✓ Browsing social media	88%
✓ Watching TV/movies at home via streaming	87%
✓ Streaming online music	85%
✓ Going out to a restaurant	84%
✓ Shopping for non-essentials	82%
✓ Going out to a coffee shop	79%
✓ Reading books/ebooks, listening to audio books/podcasts	72%
✓ Trying a new restaurant	70%
✓ Drinking alcoholic beverages	68%
✓ Review information online	66%
✓ Hosting or attending dinner parties	62%
✓ Playing board games or card games	52%

Generation X

ENTERTAINMENT ACTIVITY	P6M %
✓ Watching TV/movies at home via streaming	81%
✓ Going out to a restaurant	79%
✓ Browsing social media	78%
✓ Shopping for non-essentials	77%
✓ Going out to a coffee shop	71%
✓ Streaming online music	65%
✓ Trying a new restaurant	64%
✓ Reading books/ebooks, listening to audio books/podcasts	62%
✓ Drinking alcoholic beverages	59%
✓ Review information online	58%
✓ Hosting or attending dinner parties	53%
✓ Watching cable or PVR TV	52%

Baby Boomers

ENTERTAINMENT ACTIVITY	P6M %
✓ Going out to a restaurant	77%
✓ Reading books/ebooks, listening to audio books/podcasts	71%
✓ Shopping for non-essentials	70%
✓ Drinking alcoholic beverages	68%
✓ Going out to a coffee shop	64%
✓ Watching TV/movies at home via streaming	63%
✓ Watching cable or PVR TV	62%
✓ Browsing social media	60%
✓ Hosting or attending dinner parties	58%
✓ Trying a new restaurant	55%
✓ Streaming online music	50%
✓ Playing board games or card games	41%

Base: OLG Non-Players (n=1,311)
A1 - When was the last time you participated in each of the following activities?

GEN Z Entertainment Needs States

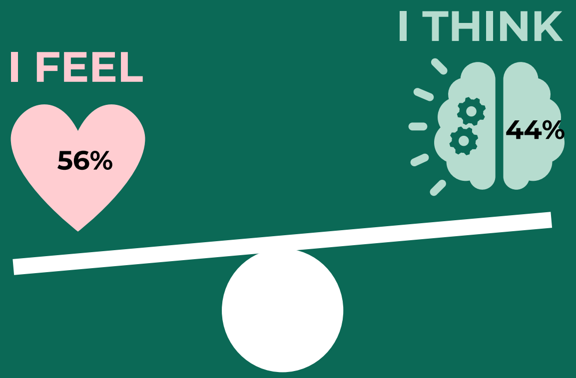
EMOTIONAL	**INDEX SCORES**
Superiority over others	169
FOMO	149
Sophisticated	148
Accepted	141
Personal Passion	140
Self-Confident	138
Purpose	134
Engaged & Invested	123
Balanced	122
Control My Life	121
Enriched	115

FUNCTIONAL	**INDEX SCORES**
Easy	119
Convenience	113
Social	111

Generation Z's preferences in entertainment are primarily influenced by their emotional needs. They are drawn to entertainment options that evoke strong emotions and contribute to their sense of status, making them feel sophisticated. Interestingly, they aim to stand out but without alienating themselves from others, as acceptance is crucial to them, aligning with their fear of missing out (FOMO). Moreover, their entertainment choices are deeply personal, focusing on passions, self-confidence, purpose, and control over their lives.

In terms of functionality, Gen Z values convenience and ease of use when it comes to entertainment. They also seek activities that facilitate social connections with others.

Emotional vs. Functional Needs Gen Z



Distribution of index scores

Millennials Entertainment Needs States

EMOTIONAL	INDEX SCORES
Superiority over others	121
Sophisticated	115
Accepted	112
FOMO	112
Release control	111

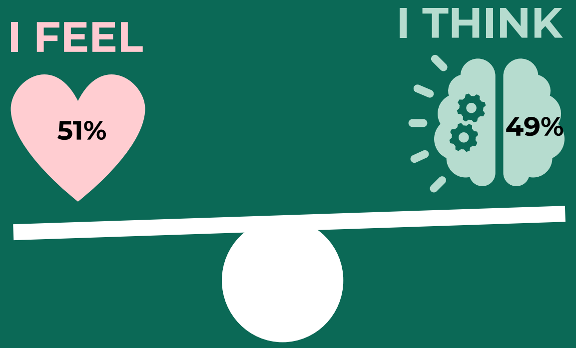
FUNCTIONAL	INDEX SCORES
Social	109
Variety of choice	106
Attention and concentration	105
Therapeutic	102

Millennials exhibit a balanced approach to both emotional and functional needs in their entertainment preferences.

On the emotional front, they share similar needs with their Gen Z counterparts, particularly a desire for superiority over others, suggesting an internal competition need state. Notably, Millennials also express a unique need to relinquish control, possibly reflecting their struggle to maintain balance, as highlighted in the values section, and their perpetual drive for greater achievements.

Regarding functional needs, Millennials seek experiences that foster social connections and offer a range of choices. Additionally, they look for opportunities to escape through focused concentration and therapeutic states.

Emotional vs. Functional Needs - Millennials



Distribution of index scores

GEN X Entertainment Needs States

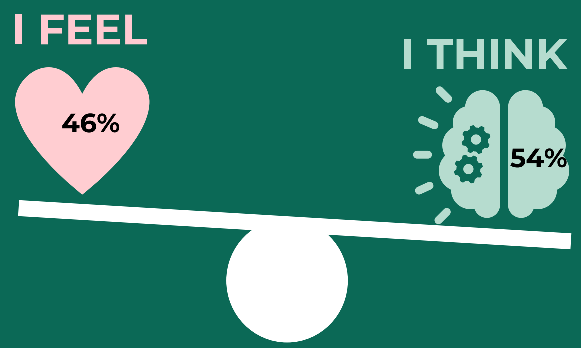
FUNCTIONAL	INDEX SCORES
Educate	123
CX	120
Efficient service	120
Exclusive	117
Laugh	114
Quick	110
Relevancy	110
Pass time	106

EMOTIONAL	INDEX SCORES
Excitement	112
Escape	111
Invigorated	108
Social Connection	104
Present in the moment	103
Lucky	101

Gen X individuals exhibit a stronger focus on functional aspects in their entertainment needs compared to their younger counterparts, reflecting distinct preferences. Specifically, they seek intellectually engaging experiences and prioritize customer experience (CX) efficiency and exclusivity.

Emotionally, they crave excitement and invigoration, actively searching for activities that provide an escape from their daily routines. Their independence is apparent, revealing multifaceted expectations and desires. This segment, while often overlooked, presents a potential opportunity for tailored experiences that cater to their unique needs.

Emotional vs. Functional Needs - Millennials



Distribution of index scores

Baby Boomers Entertainment Needs States

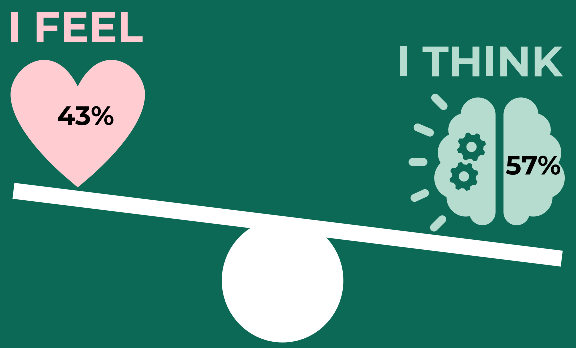
FUNCTIONAL	**INDEX SCORES**
Personal Progress	204
Exclusive	162
Modern	140
CX	139
Efficient service	138
Educate	131
Is good value for money	119
Health and wellbeing	118
Multiple outcomes	109

EMOTIONAL	**INDEX SCORES**
Anticipation	117
Playful/have fun	116
Escape	115
Piques my curiosity	107
Social Connection	104
freedom	101

Baby Boomers emerge as the most functionally driven generation in their entertainment preferences, emphasizing activities that convey a sense of progress, encompassing exercise, wellness, and social status. Similar to Gen X, they are also drawn to exclusive offers and prioritize a strong customer experience (CX). Despite their age, they seek modern entertainment activities that offer good value for money.

On the emotional side, Baby Boomers align with traditional lottery stereotypes, seeking anticipation and fun in their entertainment choices.

Emotional vs. Functional Needs - Millennials



Distribution of index scores

Motivations By Generation

GENERATION Z

MOTIVATION	INDEX SCORES
Feeling I am beating those around me	162
Not wanting to miss out	152
It gives me an opportunity to showcase that I can do it	147
The cost of participating is worth the risk	147
There is nostalgic value	121

Gen Z over indexes on motivations related to competition, FOMO, self-accomplishment, costs vs risk and feeling of nostalgia. In terms of areas of ownability, we should focus on competition and self-accomplishment as the competitors are not owning that space today.

MILLENNIALS

MOTIVATION	INDEX SCORES
Having control over my financial freedom	180
Provides me the freedom to dream	154
The hope / anticipation its brings	139
It is something that brings me joy, either by myself or with others	137

From a Millennial perspective, control of finances and freedom to dream come out as key areas of opportunity. We can reinforce the dream and think about ways to enhance the control of finances, which competitors are not leading.

GENERATION X

MOTIVATION	INDEX SCORES
It is part of a routine for me	190
Enabling me to contribute to something bigger than me	126
It is an easy way to enhance my mood	118

Gen X, want routine, to contribute and enhance their mood. All of which we are falling behind on to the competition. IF this segment is one we want to go after we will have to address these motivations.

BABY BOOMERS

MOTIVATION	INDEX SCORES
The positive impact it can have on my community	205
It is a way to escape the day to day	134

Baby boomers, are extremely motivated by impacting the community. Surprisingly, we are on par with the competition here. This has been a struggle for us to breakthrough, but it is worth another focus and attempt.

Base: Among those 'not never' in activity at A1 (Base size varies)
C1. Here are some reasons that people say encourage them to play/participate in OLG offerings. Please select up to five reasons that describe why you play/participate in OLG offerings.

Barriers By Generation

GENERATION Z

MOTIVATION	INDEX SCORES
I am embarrassed to participate in that activity	167
Participating provides too much anxiety for me to handle	154
I don't know where to participate	150
It is intimidating to understand	149
I don't know how to actually do it	145
I would rather do something where I know the impact is felt	128

Generation Z has many barriers. Many are related to lack of knowledge, intimidation, and anxiety. Highly personal barriers to address but all ownable in comparison to the competition.

MILLENNIALS

MOTIVATION	INDEX SCORES
I don't know anyone who is good at it	125
I don't want to contribute to something deemed harmful	116
I don't have the skill or experience	112

Millennials face don't have as many barriers as Gen Z, but they are challenging to address. The aspect of skill as well as social stigma are areas of which matter the most to them.

GENERATION X

MOTIVATION	INDEX SCORES
I can't afford to do it as often as I would like	120
I can't control the outcome	113
It is not clear to me who benefits from my participation	104

Gen X, are challenged with budget, which is interesting as they are the most affluent. Traditional barriers of controlling the outcome and where the moneys goes are top of mind for this group.

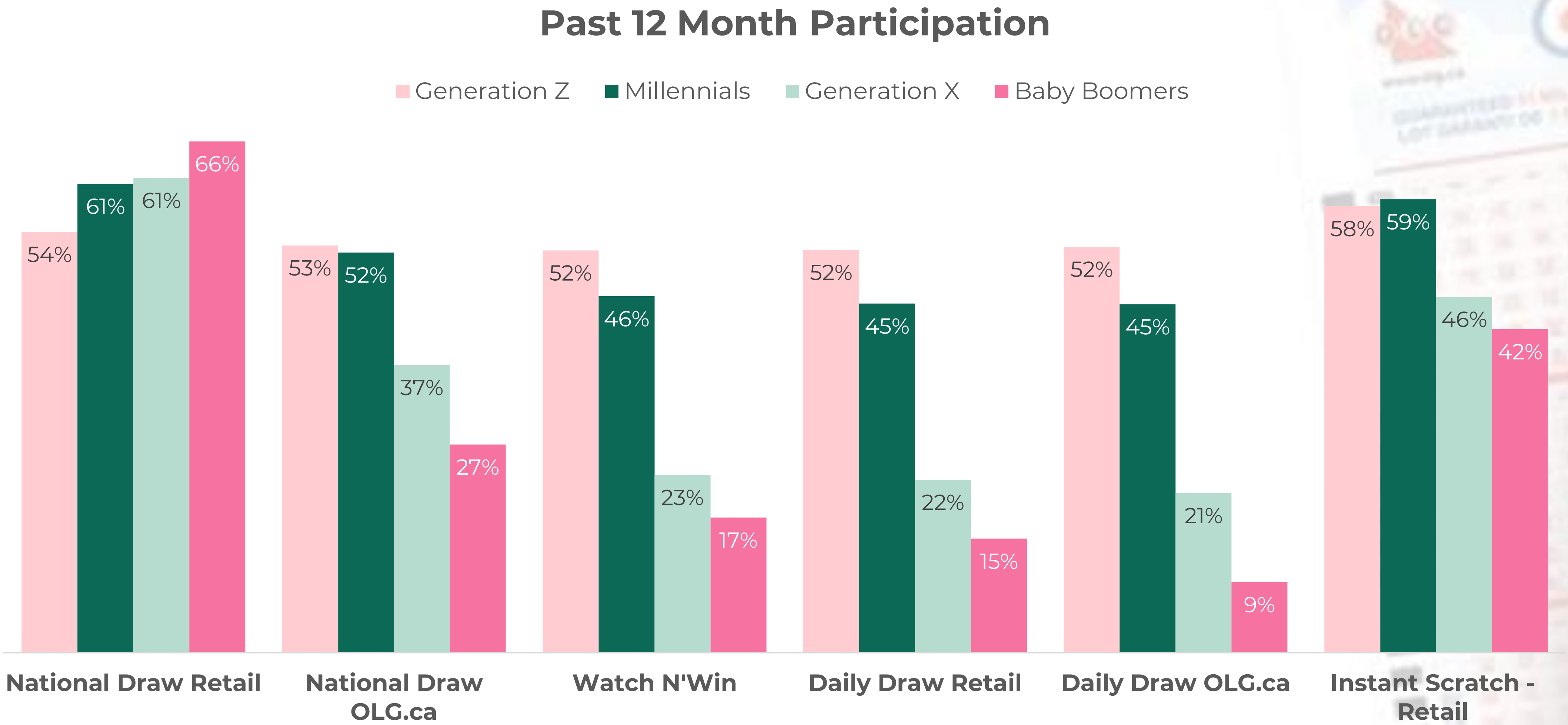
BABY BOOMERS

MOTIVATION	INDEX SCORES
I am satisfied with where I am at in life	142
There are better ways to spend my money	134
I find satisfaction in other areas	132
It is not for someone like me	119
There is next to no chance that I will succeed	116

Baby Boomers barriers are quite diverse. The focus on their current internal satisfaction, which translate into that don't see a need, and can't see themselves playing or ever winning.

Base: Among those 'not never' in activity at A1 (Base size varies)
C2. Here are some reasons that people say hold them back from playing/participating more often in OLG offerings. Please select up to five reasons that inhibit you from playing/participating more often in OLG offerings.

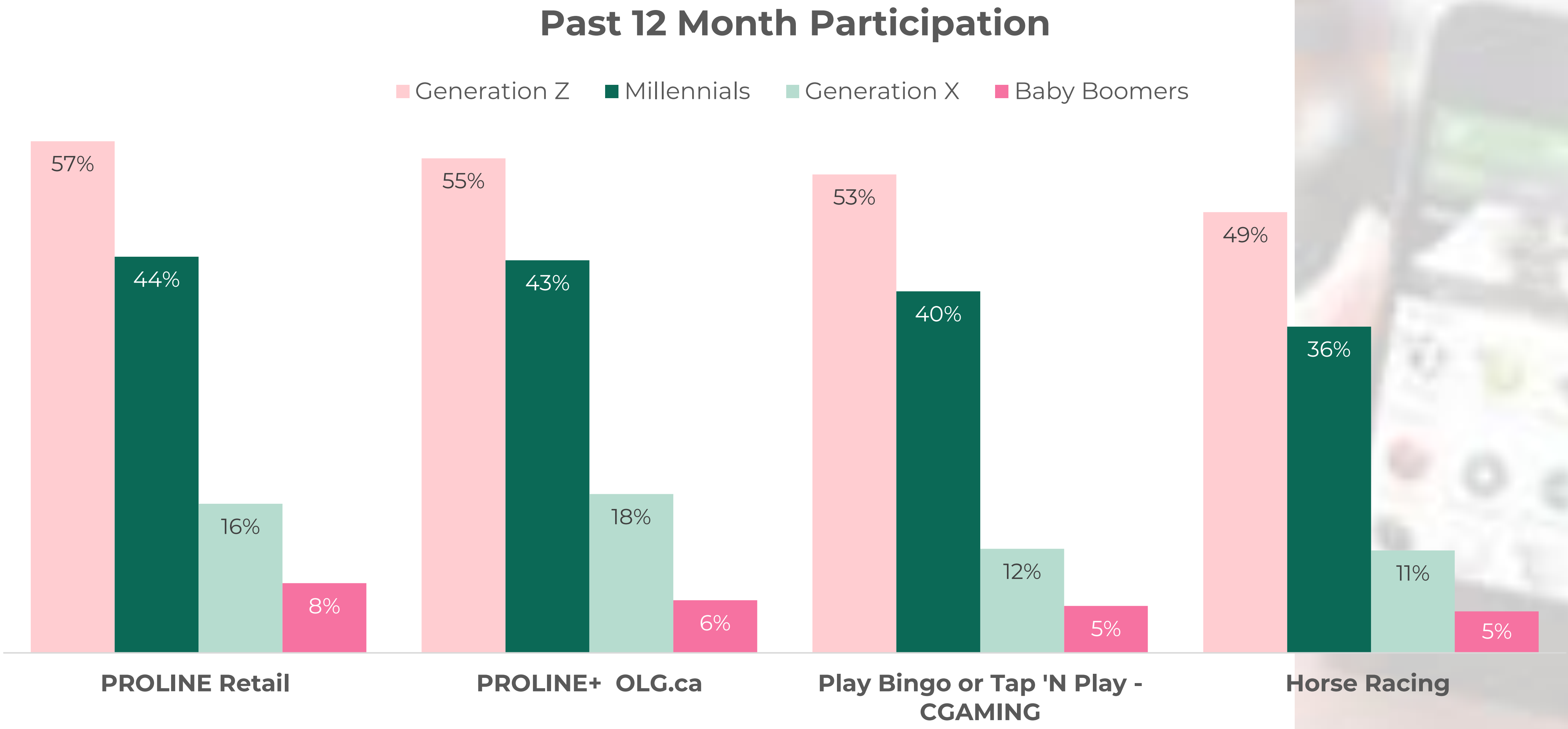
Lottery Products by Generation



	Generation Z	Millennials	Generation X	Baby Boomers
National Draw Retail	54%	61%	61%	66%
National Draw OLG.ca	53%	52%	37%	27%
Watch N'Win	52%	46%	23%	17%
Daily Draw Retail	52%	45%	22%	15%
Daily Draw OLG.ca	52%	45%	21%	9%
Instant Scratch - Retail	58%	59%	46%	42%

Base: Among those aware of LOB (Base size varies)
A1 - When was the last time you participated in each of the following activities?

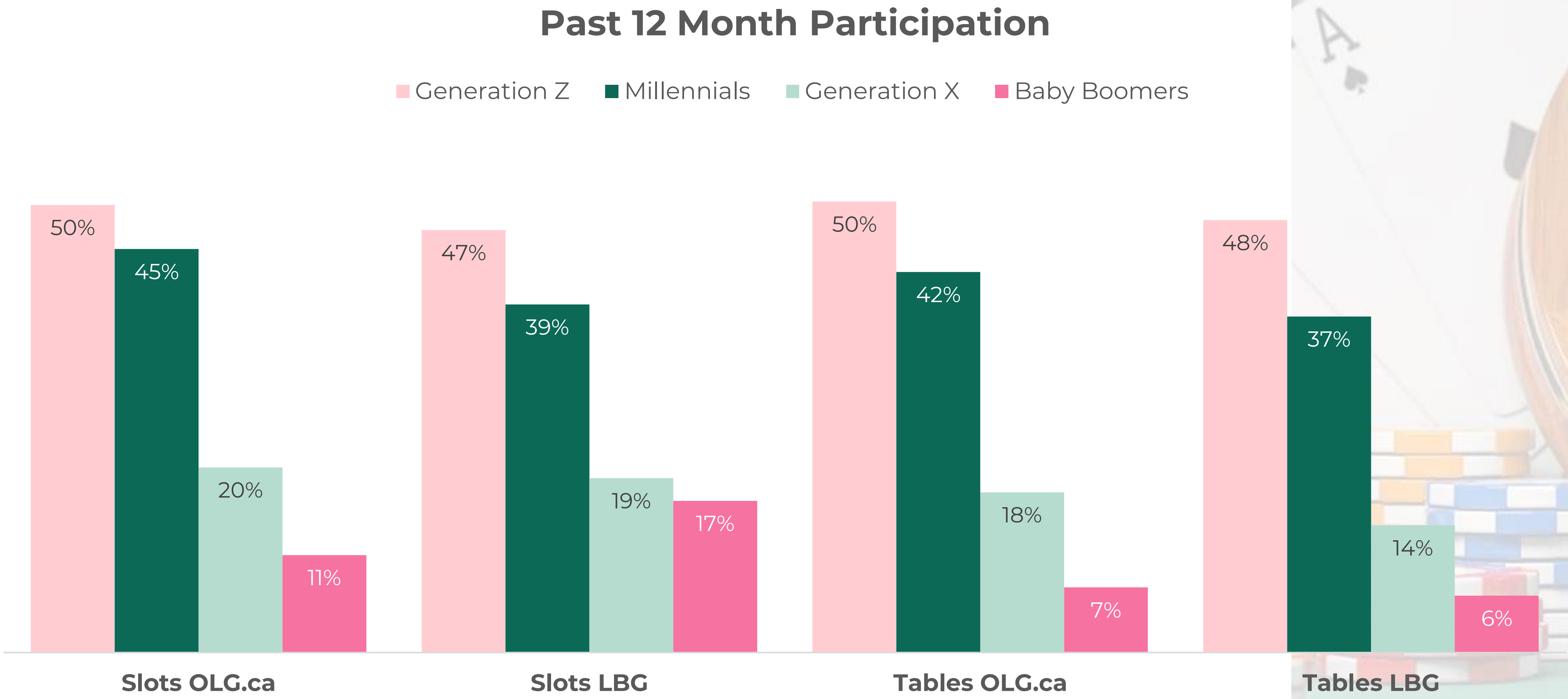
Sports, Bingo, Horse Racing by Generation



	Generation Z	Millennials	Generation X	Baby Boomers
PROLINE Retail	57%	44%	16%	8%
PROLINE+ OLG.ca	55%	43%	18%	6%
Play Bingo or Tap 'N Play - CGAMING	53%	40%	12%	5%
Horse Racing	49%	36%	11%	5%

Base: Among those aware of LOB (Base size varies)
A1 - When was the last time you participated in each of the following activities?

Casino Products by Generation



Base: Among those aware of LOB (Base size varies)
A1 - When was the last time you participated in each of the following activities?