

Toronto Resident Casino Survey

Prepared for The City of Toronto



ENVIRONICS
R E S E A R C H G R O U P

Summary

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- Nearly all Torontonians are aware that a casino is being considered for their city. Residents are slightly more likely to oppose than support the proposal, with social problems such as gambling addictions serving as the number one reason for opposition.
- Few of those who do not support the casino outright say their concerns are eased by a promise of a certain level of general revenue. However, those who are not wholly opposed to the project have little desire for a property tax increase instead.
- The prospect of dedicating casino revenue to a specific city service produces an even split between support and opposition. Transit and infrastructure are the preferred services to receive casino revenue. Residents of the former City of Toronto are most interested in dedicating casino revenue to transit.
- When residents are told that a casino is likely to go somewhere in the GTA, a majority prefer it is located in Toronto, where it can be properly planned and managed by the City.
- Of the possible locations for a casino, residents prefer Exhibition Place, followed by the Port Lands, while a casino in the downtown core is least preferred. A majority of residents support expanded gaming at Woodbine Race Track.
- Four in ten residents would visit a new casino if it was built, with interest higher among previous casino visitors (who also tend to be the strongest supporters of a Toronto Casino). Most potential casino-goers say they are willing to take public transit if parking is limited.

Methodology

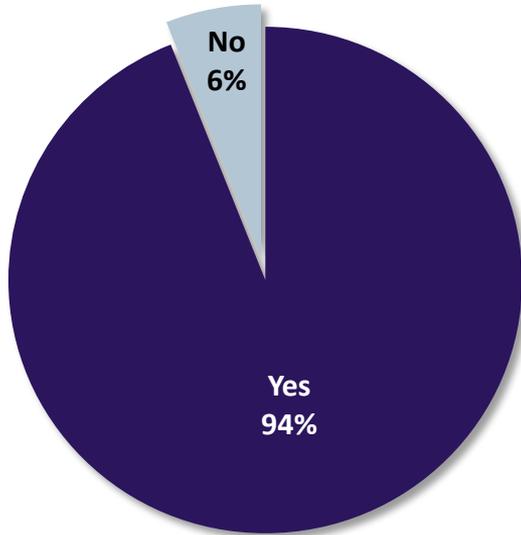
Methodology

- This report presents the results of a telephone survey conducted among 902 adult Toronto residents from February 20 to 26, 2013. The margin of error for a sample of this size is plus or minus 3.3 percentage points (at the 95% confidence level).
- The sample consisted of 100 interviews each in **York** and **East York** and 175 interviews each in **Scarborough, Etobicoke, North York** and the former **City of Toronto**.
- The data are statistically weighted to ensure the sample's regional, age and gender composition reflects that of the actual Toronto population according to the 2011 Census.
- Participants were asked a series of demographic questions including age, education and income to aid in analysis.
- In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the charts due to rounding.
- All results are based on the entire sample of 902 residents unless otherwise noted.

Awareness and support

Nearly all residents are aware the city is considering the approval of a casino in Toronto.

Aware a casino is being considered

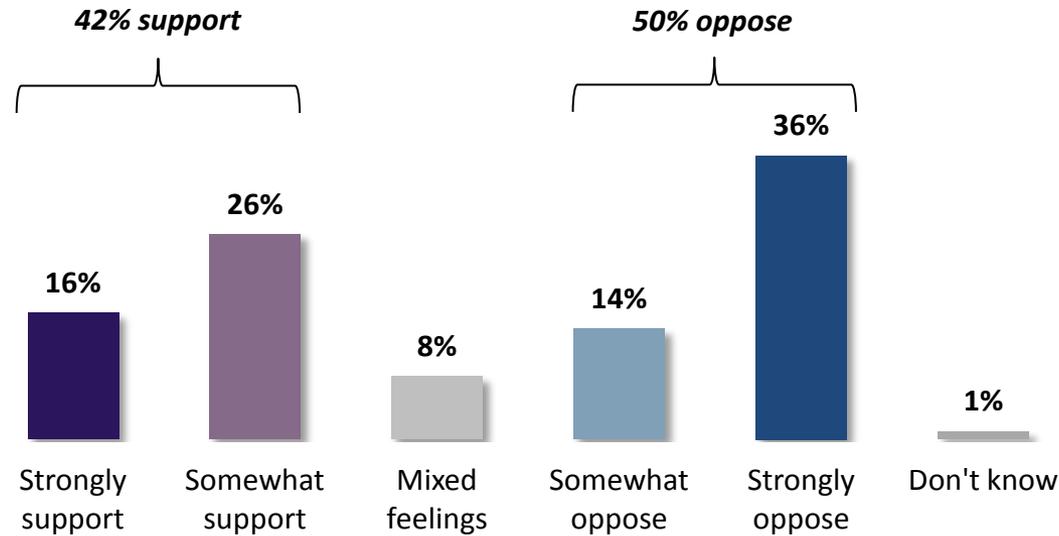


Awareness that the City is considering the approval of a casino is high throughout Toronto. More than nine in ten residents (94%) are aware a casino is being considered, with residents of East York (99%) and the former City of Toronto (98%) showing the greatest awareness. Young adults (aged 18 to 29) are the least aware, with one in ten (12%) unfamiliar with Toronto’s consideration of a casino.

Q1. Are you aware that the City of Toronto is considering whether or not to approve a new Casino as part of an integrated complex with restaurants, entertainment and other facilities and activities?

There is no consensus about a new casino, but opposition slightly outweighs support.

Support for a casino in Toronto



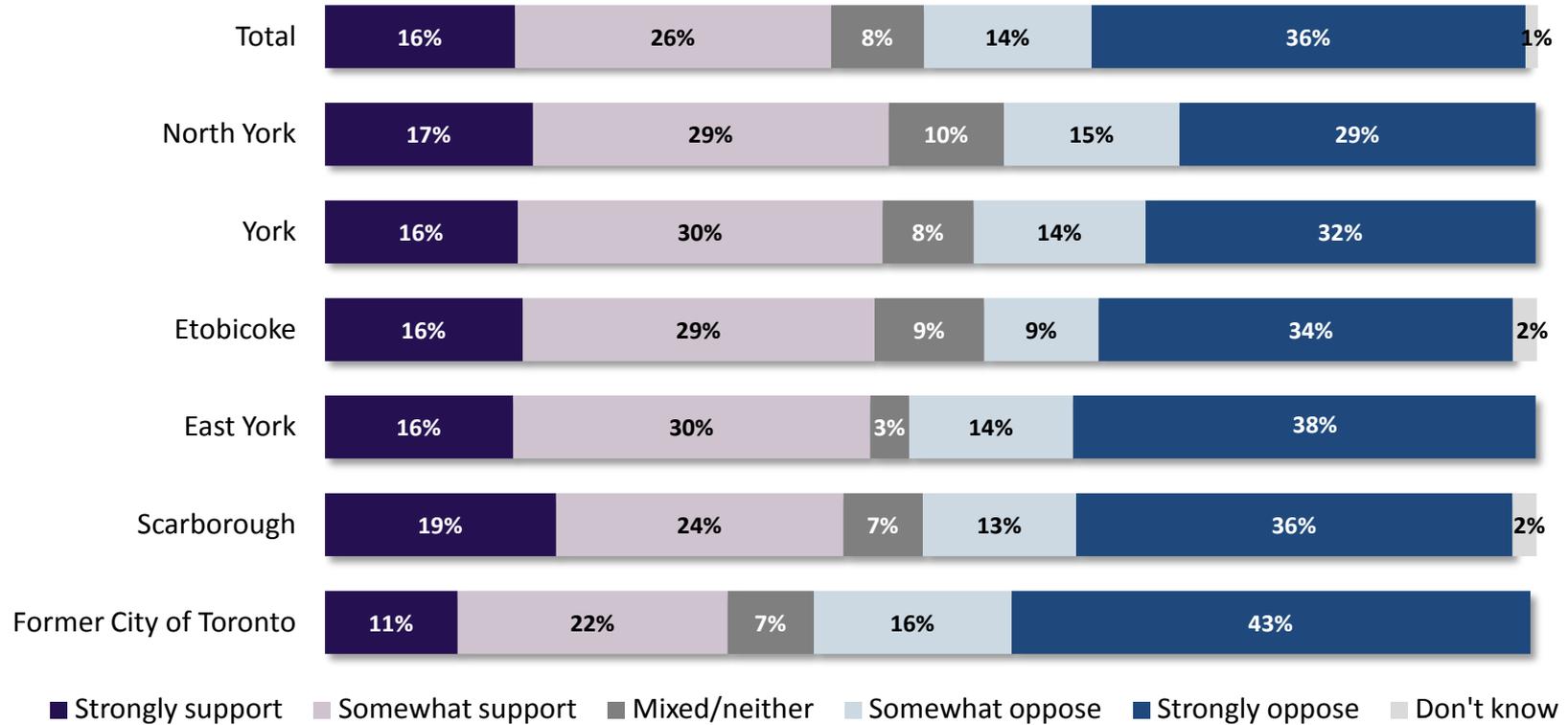
When residents are asked if they support or oppose a casino, the results are mostly split, with opposition to the casino (50%) somewhat greater than support (42%). Moreover, strong opposition to a casino (36%) is twice as high as strong support (16%).

Opposition to a Toronto casino is greatest among residents who reside in the former City of Toronto (59%), women (55%), those with a university (57%) or post graduate degree (59%) and residents aged 60 and older (59%). It is also higher among residents who have not been to a casino in the past five years (61%) or who have not enjoyed previous casino visits.

Q2. To what extent do you support or oppose the possibility of a new casino in Toronto?

Support for a casino is greater in the areas outside of the former City of Toronto.

Support for a casino By region

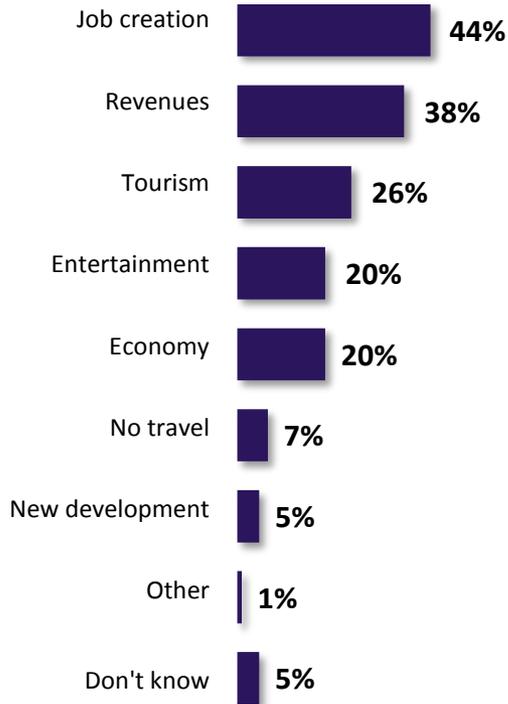


Q2. To what extent do you support or oppose the possibility of a new casino in Toronto?

Job creation and revenues are the top reasons for supporting a casino, while concerns about social problems and crime are behind much of the opposition.

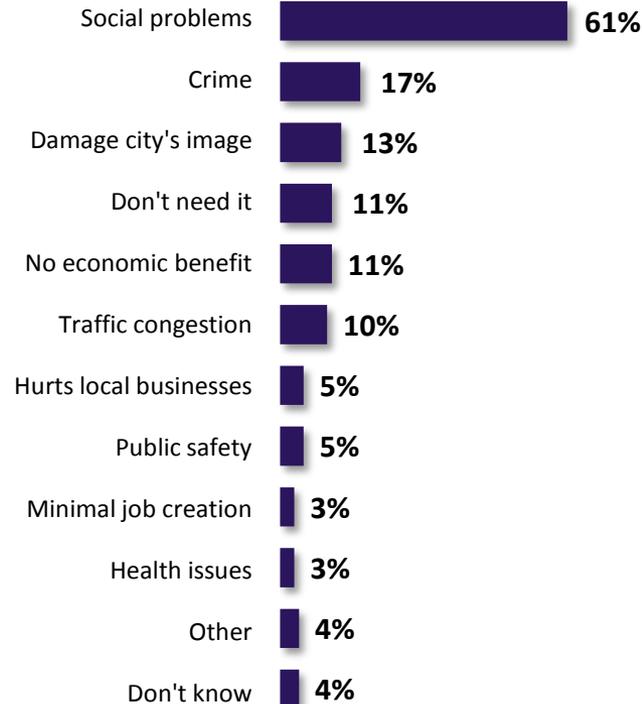
Reasons for support

Those who support a casino



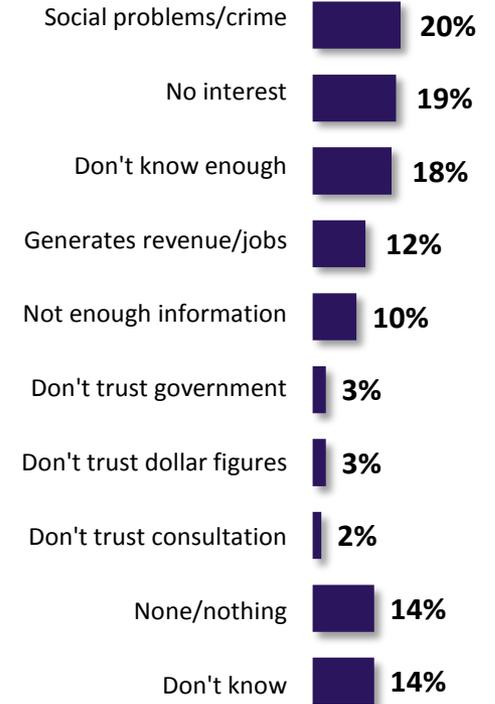
Reasons for opposition

Those who oppose a casino



Reasons for uncertainty

Those who have mixed feelings



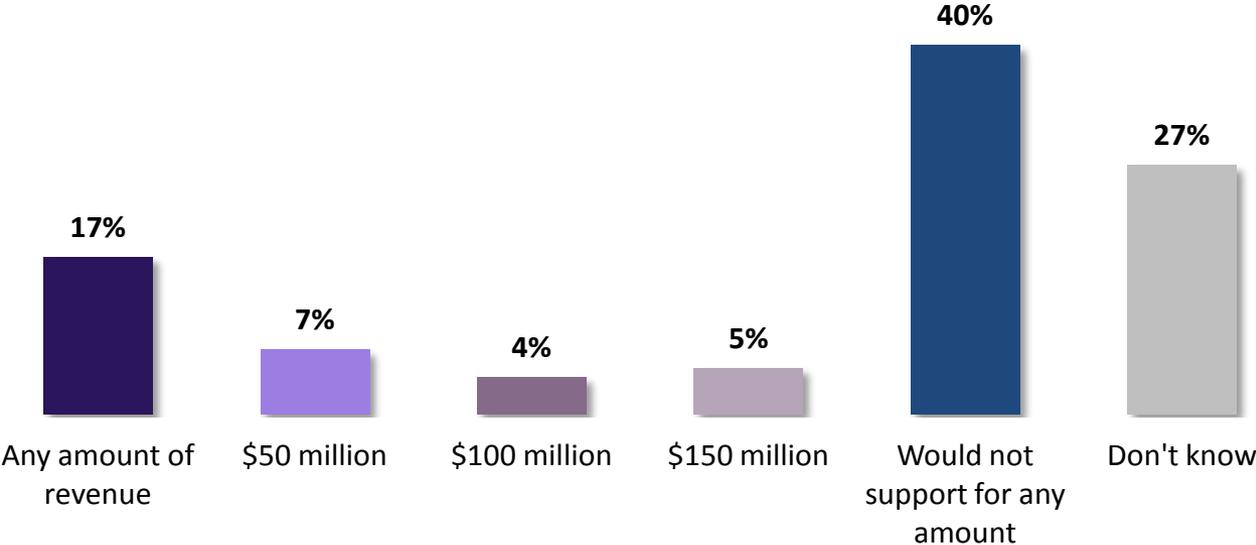
Q3A. Why do you support a new Casino in Toronto?

Q3B. Why do you oppose a new Casino in Toronto?

Q3C. Why do you feel this way about a new Casino in Toronto?

Four in ten residents say they would not support a casino regardless of the revenues it would bring to the city.

Minimum amount of revenues to balance concerns



To a large proportion of residents (40%), no amount of revenue to the city will alleviate their concerns about a new casino in Toronto. Women (43%), those with university educations (44%) and residents aged 60 and older (48%) are most likely to say they will not support a casino for any amount of revenue.

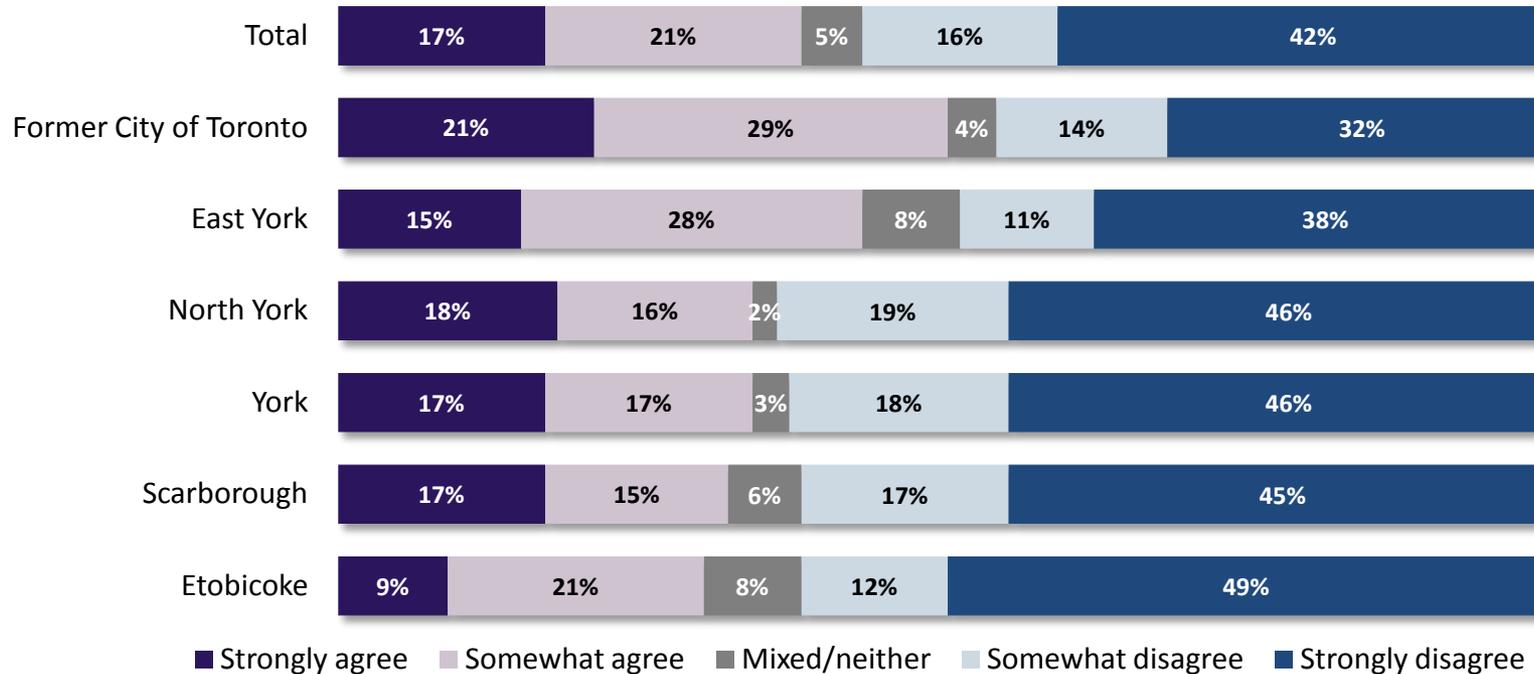
Of residents who oppose the plan, only one in ten (9%) say they would be swayed from their view by the additional revenue while three-quarters (73%) say they would not support a casino for any amount. Of residents who initially have mixed feelings about a casino, one-third (33%) say the revenue would make a difference to their opinion while two in ten (19%) say it would not (the remainder are uncertain).

Q4. Is there a minimum amount of annual revenue to the City of Toronto which might address or balance any concerns you may have about a new casino?

A majority of residents disagree that the city should raise property taxes to generate revenue rather than approve a casino.

Would rather the city raise property taxes than approve a casino

By region

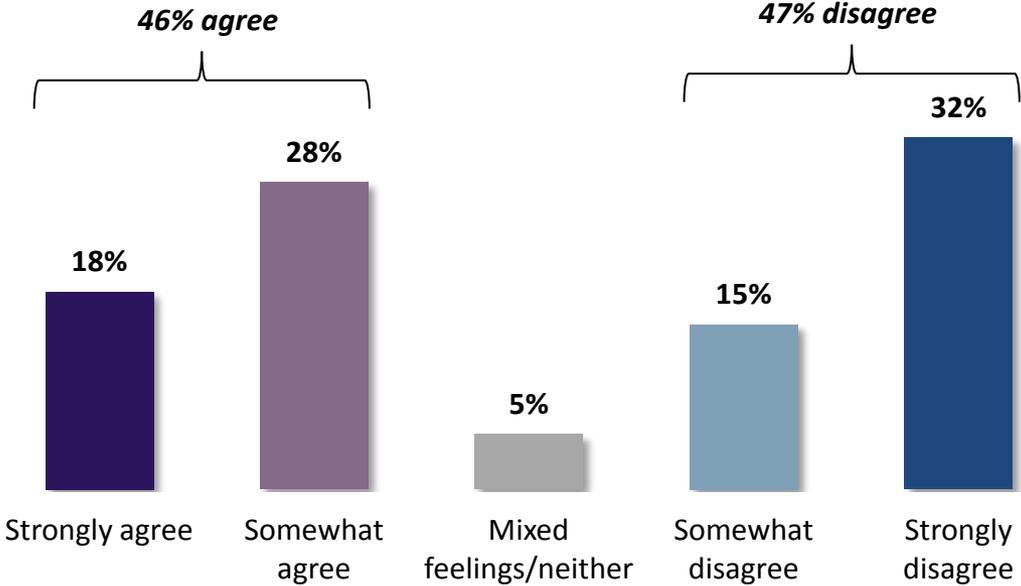


Only a minority of residents (38%) would prefer to generate revenue through higher property taxes than through a casino, and this clearly influences the overall level of support for a casino. Residents who strongly oppose a casino tend to prefer a property tax increase (68% agree). However, almost half (47%) of those who are somewhat opposed to a casino *disagree* with a property tax increase, as do most of those who support (86%) or have mixed feelings (68%) about the casino.

Q5A. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. I would rather have the City raise property taxes to generate revenue than approve the establishment of a new casino

Support for a Toronto Casino increases slightly if revenue is dedicated towards a specific service.

Would support a casino if revenue is directed to specific City service



Views are divided on whether dedicating revenue to a specific City service rather than general revenue would lead them to support a casino, with less than half (46%) who agree and a similar proportion (47%) who disagree. Agreement is most widespread among younger residents (under 60) and those with less education.

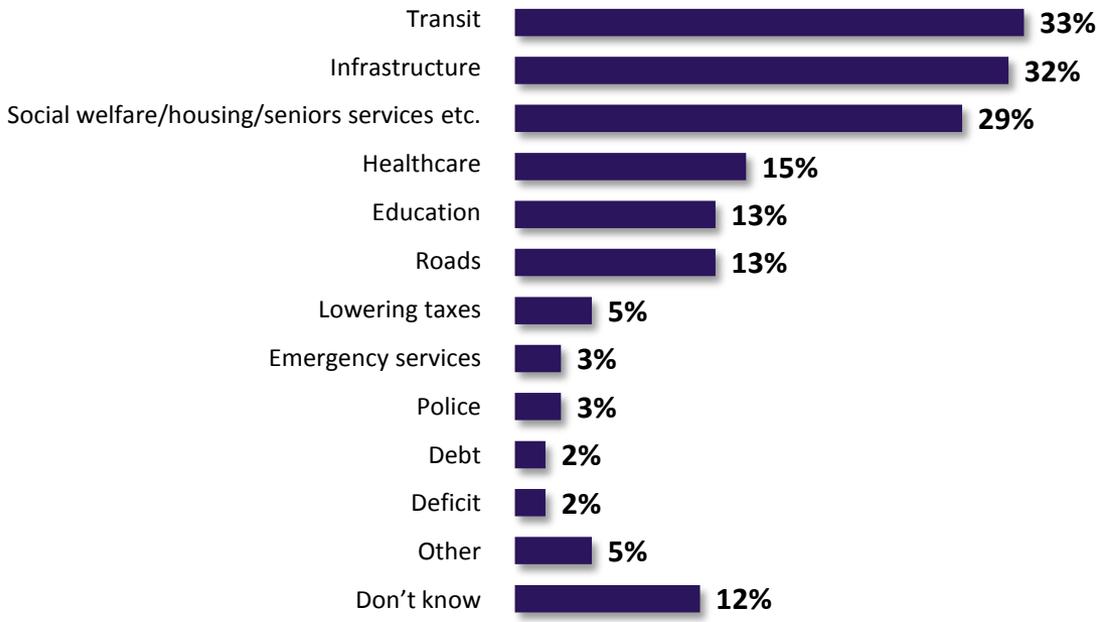
Most residents who strongly oppose the casino say a proposal to dedicate revenue will not change their opinion (78% disagree with the statement). Notably however, two-thirds (65%) of those who initially had mixed feelings and almost half (48%) of those who *somewhat opposed* a casino agree they would support it if a dedicated revenue plan was introduced.

Q5B. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. I would support a casino if the revenue was directed to a specific City service rather than to general revenues.

Transit, infrastructure and social services are the most commonly suggested services that should receive casino revenue.

Preferred service to direct revenue

Among residents that would support a casino if the revenue is directed to a specific city service

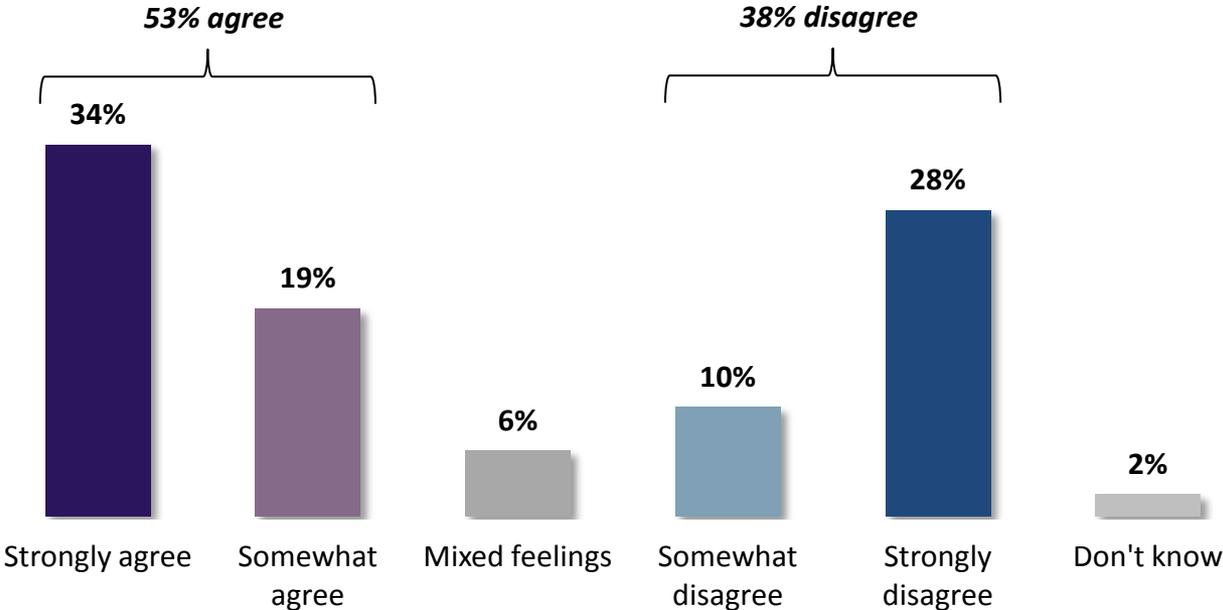


Residents who would support a casino if the revenue goes towards a specific city service are most likely to want to direct the revenue to transit (33%), infrastructure (32%) and social welfare (29%). Residents of the former City of Toronto (47%) and those with post-graduate educations (55%) are the strongest supporters of dedicating revenue to transit, while women are more likely to suggest the funds be directed to social welfare services (36%) and health care (19%).

Q6. Where would you like to see Casino revenue go? Subsample: those who would support a casino if the revenue was directed to a specific city service (n=397)

A slim majority of residents would rather have the casino in Toronto than in a neighbouring municipality.

Prefer a casino in Toronto rather than adjacent municipality



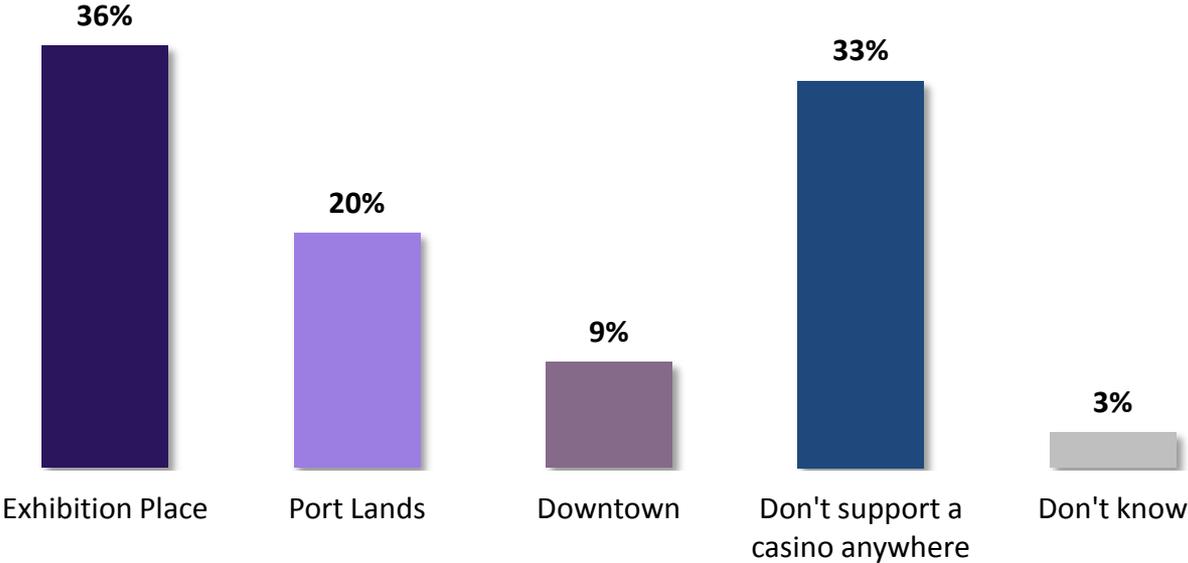
Although Torontonians are reluctant to support a casino in the city, a small majority (53%) agree that they would rather it be in Toronto than in an adjacent municipality, so the city can plan for and decide on its development. Those most likely to agree include residents of Scarborough (59%), those with a high school (65%) or college education (61%) and men (59%).

Most residents who strongly oppose the casino disagree that they would prefer a casino in Toronto than another municipality (76%). Notably however, six in ten (60%) of those who initially had mixed feelings and a substantial minority (44%) of those who *somewhat opposed* a casino agree they would rather a casino be built in Toronto than elsewhere.

Q11. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement. I would rather the casino be in Toronto than in an adjacent municipality so that Toronto can better plan for and decide on its development

Exhibition Place is the preferred location of Toronto residents for a casino.

Preferred location of a casino



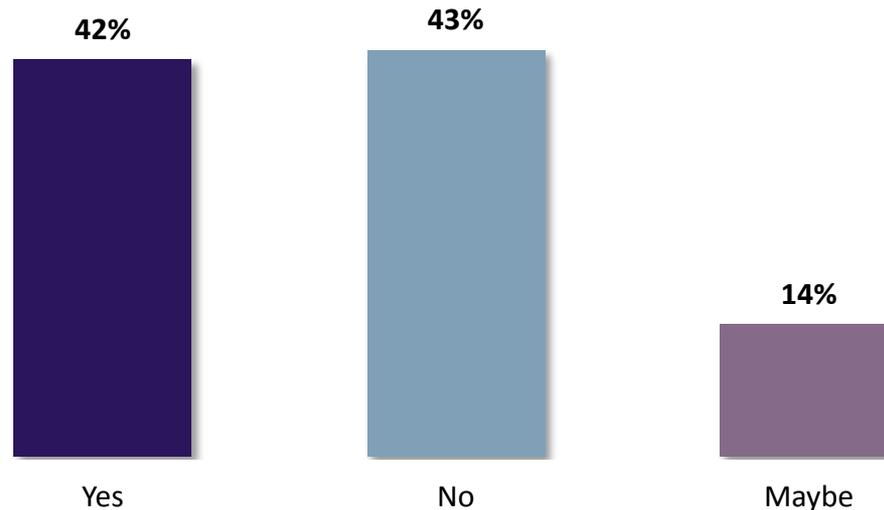
Of three possible locations for a Toronto casino, the most popular option is Exhibition Place (36%), followed by the Port Lands (20%), while the downtown core is the least popular option (9%). One in three residents (33%) say they do not support a casino anywhere in the city. Location preferences for the casino are similar throughout the region.

Q7. Which of those locations would you prefer?

Potential casino use

A substantial minority of residents would visit a new Toronto Casino.

Visit a new Toronto Casino?



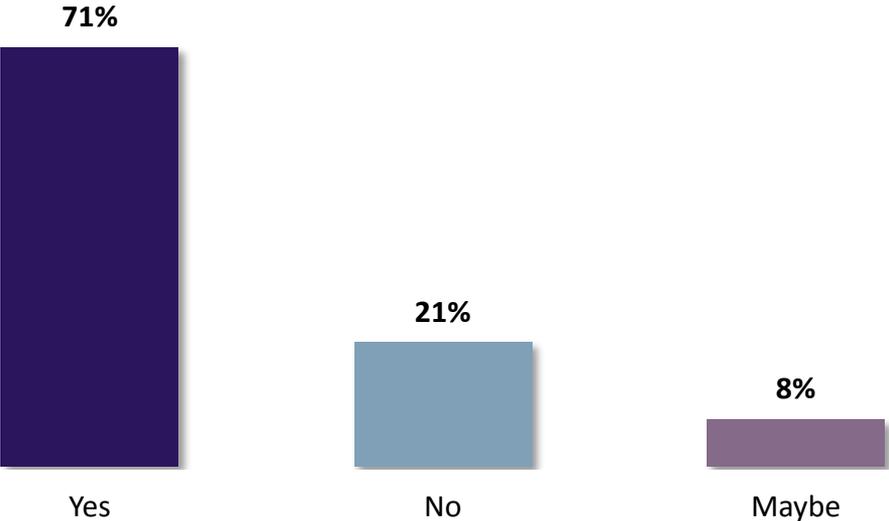
Four in ten (42%) residents say they would visit a new Toronto Casino if it were built. Likelihood to visit is highest among residents of York (53%), men (52%), younger people (under 60) and those who have previously visited a casino (57%), and lower among residents of East York (36%) and the former City of Toronto (35%).

Potential attendance is closely tied to support for a casino: nine in ten (89%) strong supporters would visit compared to only one in ten (8%) who are strongly opposed. Those with mixed feelings about a Toronto casino are also divided about whether they would visit (36%) or not (29%), with another three in ten (30%) who are unsure.

Q13A. *If built, would you visit a new Toronto Casino?*

The majority of would-be casino goers are open to taking public transit if parking is limited.

Take transit if parking is limited? *Those who would visit a new Toronto Casino*



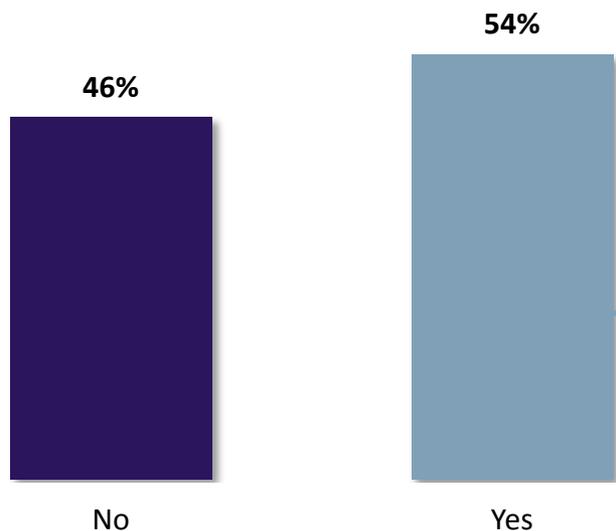
Potential visitors to a new casino are open to taking public transit to get there. Seven in ten (71%) say they would take public transit if parking was limited. Support for transit use to get to a casino is highest among residents of the former City of Toronto (85%) and lowest in Etobicoke (61%) and Scarborough (64%).

Q13B. If parking was limited, would you take public transit to the casino? Subsample: those who would go to a new Toronto casino (n=370)

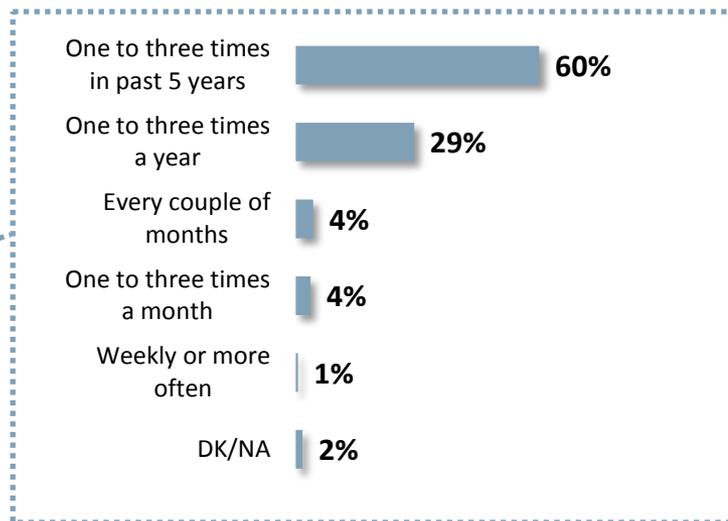
Casino experience

Just over half of Toronto residents have been to a casino in the past five years, though few go regularly.

Been to a casino in past 5 years



Frequency of casino visits



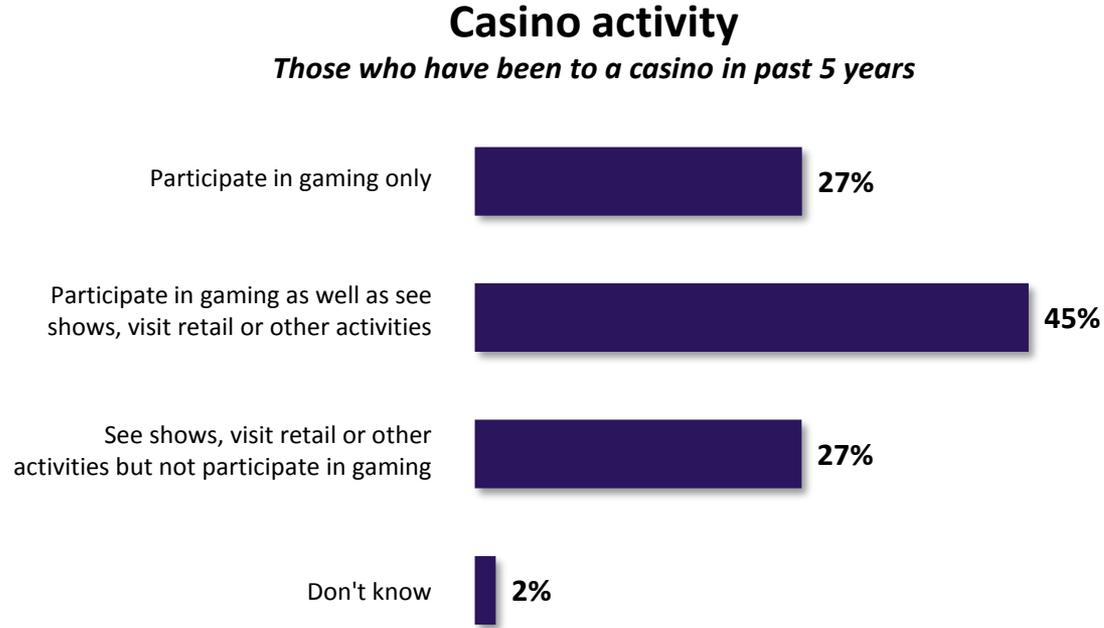
A small majority of Toronto residents (54%) have been to a casino in the past five years. Most of this group have visited only a couple of times during this time period (60% say one to three times in the past five years), with few who take monthly (4%) or weekly (1%) trips.

Casino visits are more common among residents of York (63%), North York (61%) and Etobicoke (58%), and among those who support a casino for Toronto.

Q12A. Have you visited a casino in the past five years?

Q12B. Approximately how often have you visited a casino in the past five years? Subsample: those who have been to a casino in past five years (n=488)

Just under half of casino goers say they see shows, visit retail or take part in other activities along with gaming when visiting a casino.



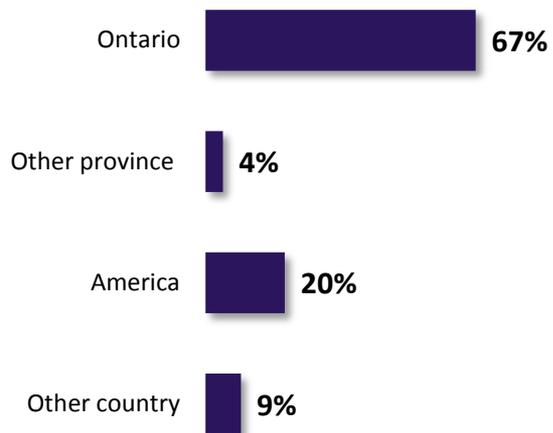
Of those Toronto residents who have been to a casino in the past five years, close to half (45%) say they see shows, shop or take part in other activities along with gambling. One in four (27%) say they participate in gaming only while an equal proportion (27%) only take part in activities other than gambling.

Q12D. When visiting a casino, do you . . . ? Subsample: those who have been to a casino in past five years (n=488)

Two in three casino visitors last went to a casino elsewhere in the province; most say their experiences have been enjoyable.

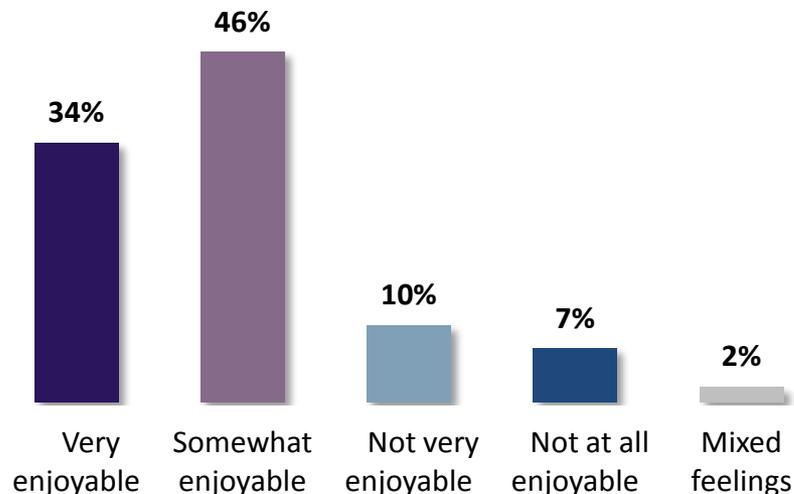
Location of last casino visit

Those who have been to a casino in past 5 years



Overall casino experience

Those who have been to a casino in past 5 years



When casino goers were asked about the location of their last visit, two in three (67%) said it took place elsewhere in the province. Residents with household incomes under \$80,000 a year are more likely to visit casinos in Ontario, while residents with higher incomes are more likely to visit casinos outside of the country.

Eight in ten casino visitors (80%) would describe their overall casino experiences to be enjoyable. Nearly all (99%) of those who strongly support a Toronto casino say their past casino experiences have been enjoyable, while four in ten (42%) of those who strongly oppose a casino in Toronto have not enjoyed their previous trips to a casino.

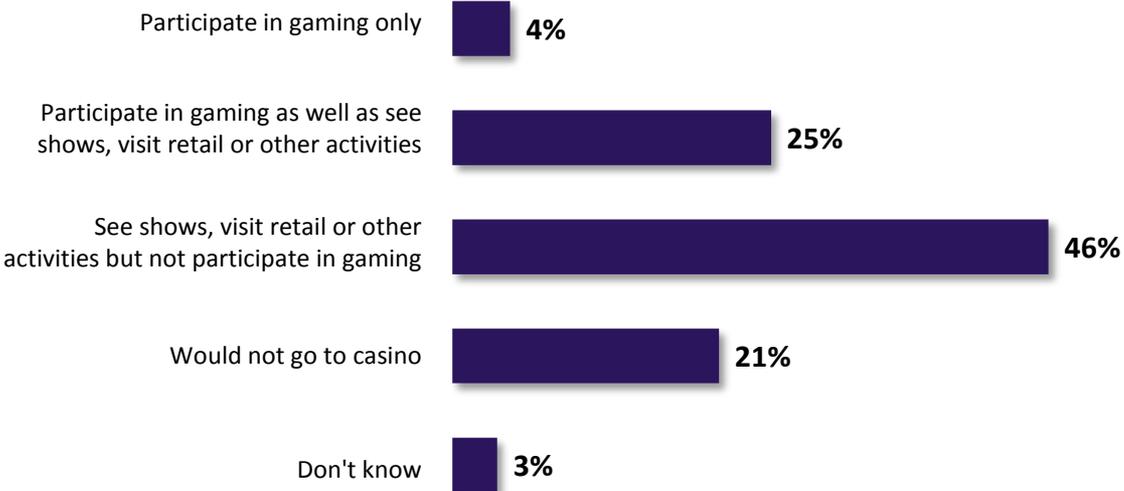
Q12C. Was your last trip to a casino in . . .? Subsample: those who have been to a casino in past five years (n=488)

Q12E. Overall, would you say your casino experiences have been . . .? Subsample: those who have been to a casino in past five years (n=488)

Half of those who have not visited a casino would likely see shows, visit retail or take part in other activities, but not participate in gaming.

Potential casino activity

Those who have not been to a casino in past 5 years



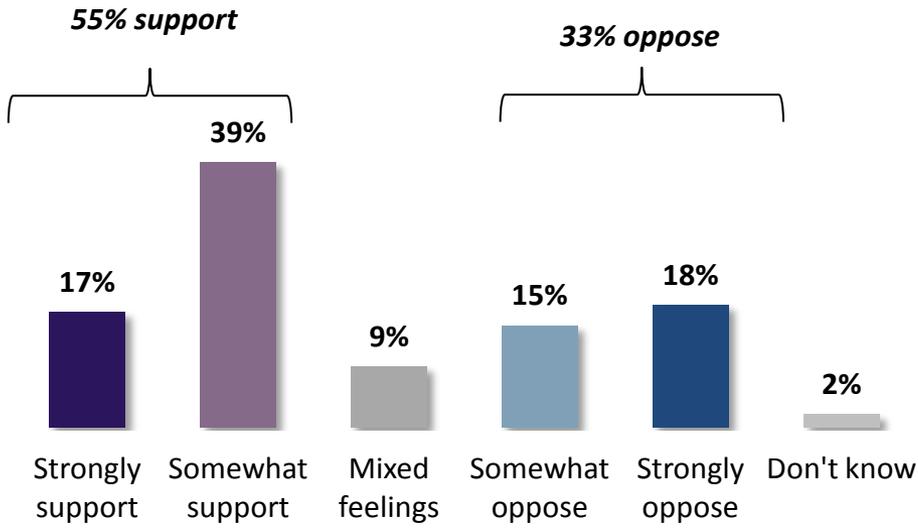
Residents who have not been to a casino in the past five years were asked what they would do if they were to go. Two in ten (21%) simply say they would not go, but close to half say they would go to see shows, shop or take part in other activities, even if they would not participate in gaming. Three in ten (29%) who have not been to a casino in five years say they would take part in gaming, either alone (4%) or along with other activities (25%). Those who strongly oppose a casino in Toronto are most likely to say that they would not go.

Q12F. If you were to go to a casino, would you be more likely to . . . ? Subsample: those who have not been to a casino in past five years (n=414)

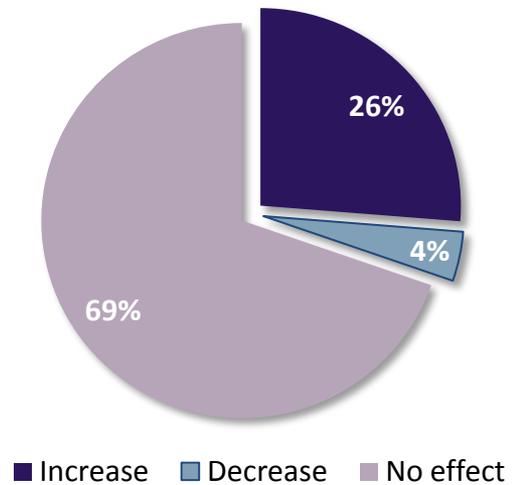
Woodbine

Most residents are aware of slots at Woodbine, and a majority would support expanded gaming. Entertainment facilities have little effect on support.

Support for expanded gaming at Woodbine



Effect of entertainment facilities on support



Eight in ten residents (80%) are currently aware of slot machine gambling at Woodbine Race Track. A small majority (55%) of residents would support expanded gaming on the site, although support is higher among those aware of the existing facilities (59%) than those who are not (41%).

Residents were informed that expanded gaming would also include entertainment facilities and restaurants at Woodbine and asked what impact this would have on their support. One in four (26%) residents say that entertainment facilities would increase their support, while the majority (69%) say it would have no effect. Additional entertainment facilities makes little difference to those who oppose expanded gaming on the site, with only one in ten (9%) who say it would increase their support for expanded gaming.

- Q8. Are you aware that Woodbine Race Track currently has permission for gambling with slot machines in addition to betting on horses?
- Q9. To what extent do you support or oppose expanded gaming at Woodbine? Would that be . . . ?
- Q10. If additional options such as entertainment facilities and restaurants were to open at Woodbine, would that increase your support, decrease your support or have no effect on your support for expanded gaming at Woodbine?



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