



Public Consultation on the Woodbine Racetrack Casino

City-Wide Telephone Poll

Final Report: June 15, 2015





Introduction

- The City of Toronto is considering expanding gaming at Woodbine Racetrack.
- Ipsos Reid was commissioned to gather evidence of public views towards a possible expansion via:
 - ⇒ a city-wide telephone poll of residents to provide statistically representative results of the opinions of Toronto residents
 - ⇒ an online survey posted on toronto.ca open for anyone interested in providing feedback to the City
 - ⇒ a public meeting open to anyone interested in attending
- This report outlines the results of the city-wide telephone poll.



Research Methodology

- This report presents the results of a telephone survey conducted among a representative sample of 701 adult Toronto residents between May 15-28, 2015. The margin of error for a sample of this size is plus or minus 3.7 percentage points (at the 95% confidence level).
- The data has been statistically weighted to ensure the sample's regional, age and gender composition reflects that of the actual Toronto population according to 2011 census data.
- In addition to the representative sample of 701 interviews, 200 interviews were conducted with residents who live in North Etobicoke (M9W and M9V) in order to boost the sample size of residents who live in the area of the Woodbine Racetrack.
- Throughout the report totals may not add to 100% due to rounding or because the question is a multi-select question, where respondents were permitted to choose more than one response.

Executive Summary



Executive Summary

- Only half of Toronto residents who were polled are aware of the issue. Perhaps not surprisingly then many residents have mixed views about it when asked.
- Initially, one-third (34%) support and one-quarter (25%) oppose expanding gaming at Woodbine Racetrack. The remaining (42%) have mixed feelings or don't know. Support is significantly higher among North Etobicoke residents (50% support, 34% mixed feelings/don't know and 16% oppose).
- The primary reasons for support are revenue for the City and jobs, and the primary reasons for opposition are concerns about increased problem gambling and the belief that gaming is a non-productive industry.
- Residents that support expansion are significantly more likely to know that Woodbine already offers slot machines, off-track betting and video-table games than who oppose.
- Once residents are told the estimated possible number of additional slots and video tables and new live tables that could be added with the expansion, support remains steady, but many of those who initially have mixed feelings shift to opposition.
- Most residents agree that the area is in need of economic development, that the expansion should include commercial development and believe expanding gaming will help sustain horseracing in the Province. Seven in ten don't believe that expansion will lead to full-time, permanent jobs and nearly as many worry that expansion will lead to an increase in problem gambling.
- When asked what conditions the City should request of the Province, OLG and the casino operator, if it approves the expansion, 48% of residents do not offer a suggestion. Of those residents who want the City to request conditions the most frequently mentioned are (in descending order, but close in magnitude): jobs for local residents, community safety/policing, counselling for gambling addiction, greater gaming control and regulation, better roads/infrastructure and commercial development.



Executive Summary

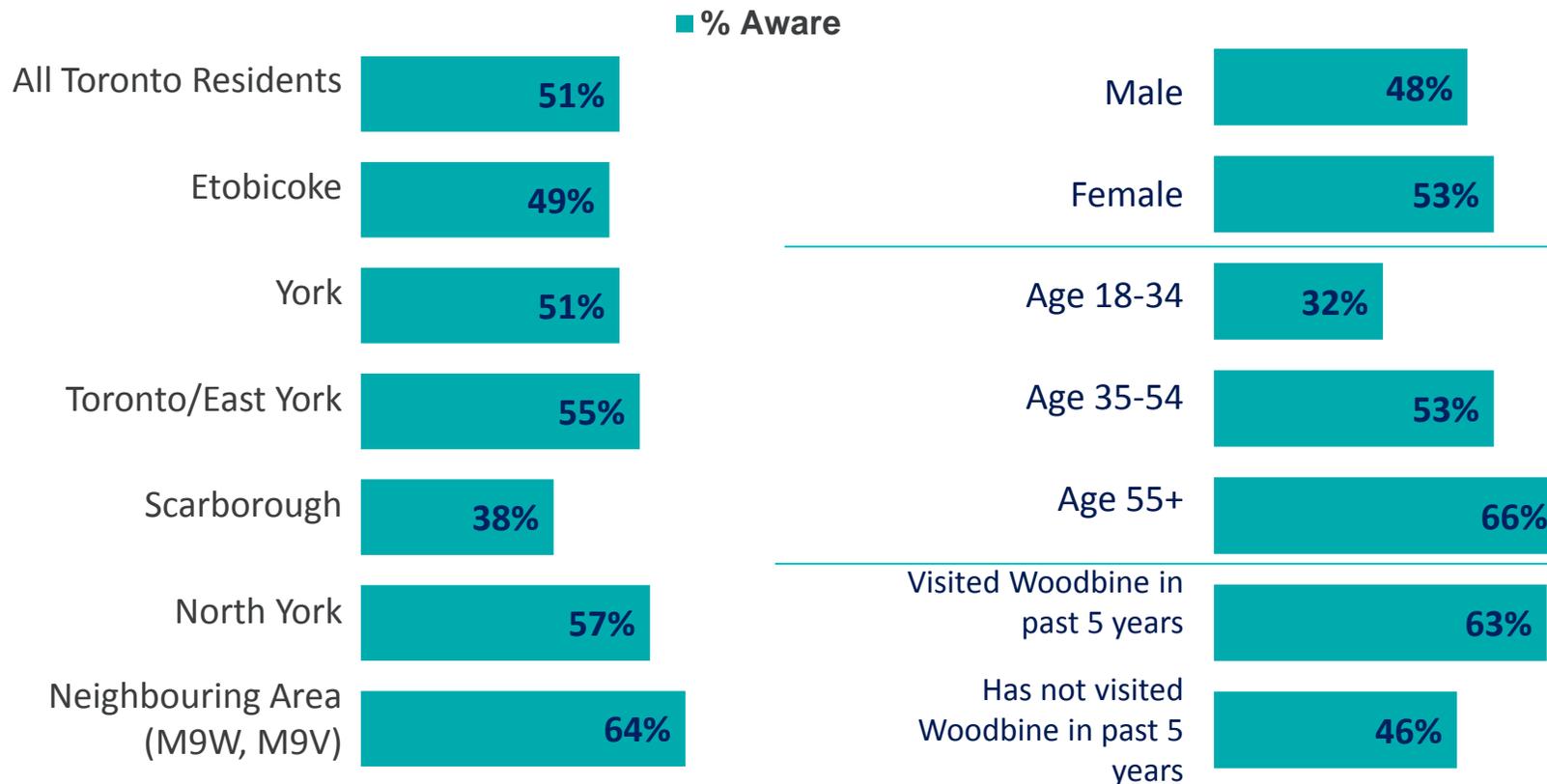
- When public support and opposition is fairly close, such as with the issue of expanding gaming at Woodbine, often the factors that are most indicative of whether or not an individual supports or opposes the issue are not the factors where there is the greatest consensus or agreement. Of the issues asked about in this poll, the strongest indicators of whether or not individuals support or oppose the possible expansion are (in descending order):
 - whether or not individuals would prefer to see expanding gaming in the City of Toronto rather than a nearby municipality knowing it is likely to happen somewhere in the GTA,
 - whether or not they agree that the existing slots and electronic tables Woodbine has had for the past 15 years have not had a significant negative impact on the community
 - and whether or not they agree that the expansion will help secure the current jobs at Woodbine.
- A majority of residents say they would be more likely to support the expansion if any or all of the key benefits/conditions (see slide 21) could be guaranteed, but most compelling are the creation of 2,600 new jobs as part of related economic development and if the City requires a community benefits agreement.
- Support increases to 72% among Toronto residents if the expansion brings new commercial development such as hotels, restaurants or entertainment venues (21% support regardless, 51% support on the condition of new commercial development), while 26% oppose the expansion regardless of whether or not there is commercial development and 3% remain unsure of their opinion.
- If expanded gaming goes ahead, currently 32% of residents say they would be more likely to visit Woodbine, but 24% say they would be less likely – the remainder say it would make no difference to whether or not they would visit.

Detailed Results

Public Awareness of Expanding Gaming at Woodbine Racetrack By Place of Residence, Gender, Age and Visits to Woodbine

- Half of Torontonians are aware that the City is considering a possible expansion in gaming at Woodbine Racetrack. Unsurprisingly, awareness is highest among those who live in the area around the Racetrack.
- Awareness is highest among those aged 35+ and those that have visited Woodbine within the past 5 years.

Q1. Are you aware that the City of Toronto is considering whether or not to approve expanding gaming at Woodbine Racetrack?

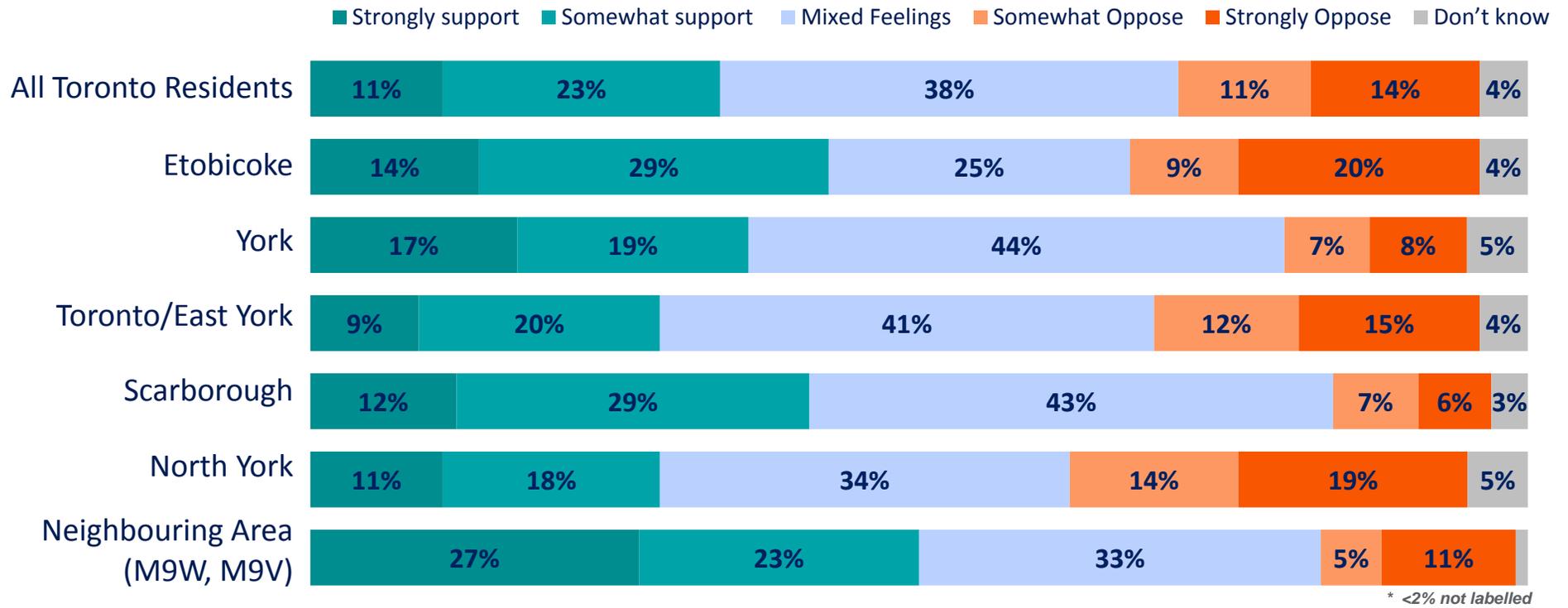


Base: All Toronto Residents (n=701); Neighbouring Area (n=200)

Public Support and Opposition To Expanding Gaming at Woodbine By Place of Residence

- One-third (34%) of Toronto residents either strongly or somewhat support expanding gaming at Woodbine Racetrack; support is highest among those living in the area of the Racetrack (50%) and in Etobicoke (43%).
- About four in ten (38%) have mixed feelings on the issue, leaving a quarter (25%) of Torontonians opposed.

Q2. To what extent do you support or oppose expanding gaming at Woodbine Racetrack?



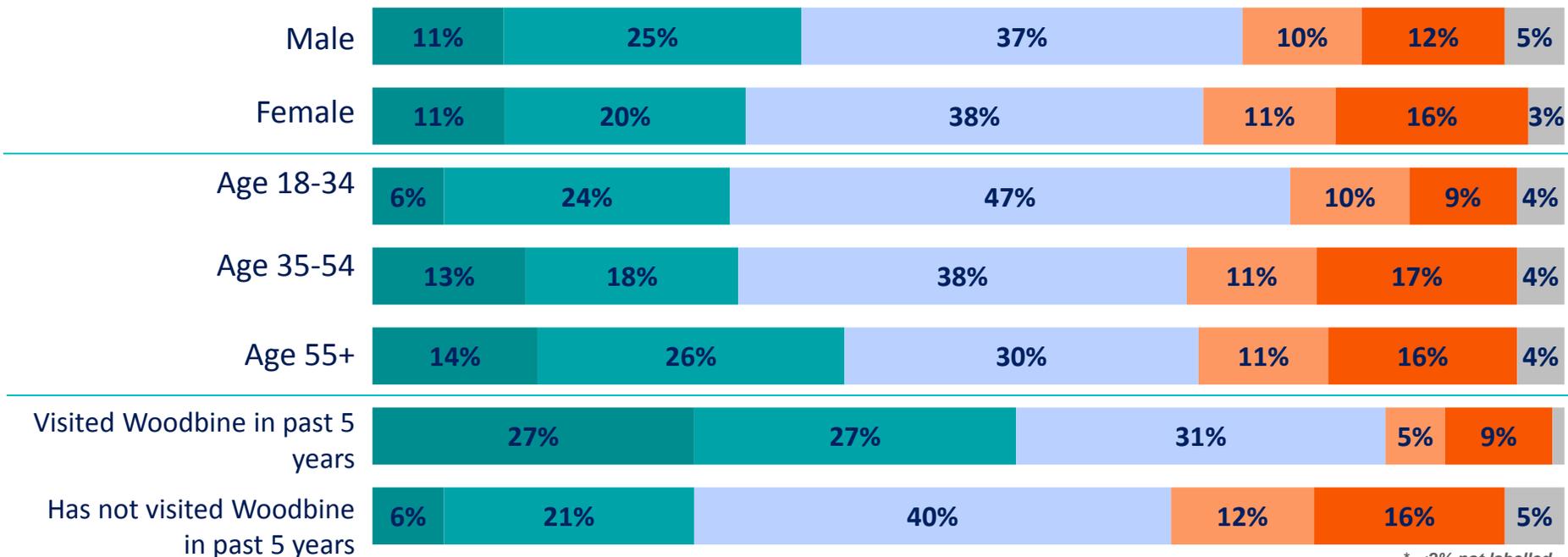
Base: All Toronto Residents (=701); Neighbouring Area (n=200)

Public Support and Opposition To Expanding Gaming at Woodbine By Gender, Age and Visits to Woodbine

- Support for expanding gaming at Woodbine is generally comparable across gender and age categories with 18-34 year olds being more likely than those aged 55+ to have mixed feelings.
- Respondents who have visited the Racetrack in the past 5 years are significantly more likely to strongly support expanded gaming than those who have not.

Q2. To what extent do you support or oppose expanding gaming at Woodbine Racetrack?

■ Strongly support ■ Somewhat support ■ Mixed Feelings ■ Somewhat Oppose ■ Strongly Oppose ■ Don't know

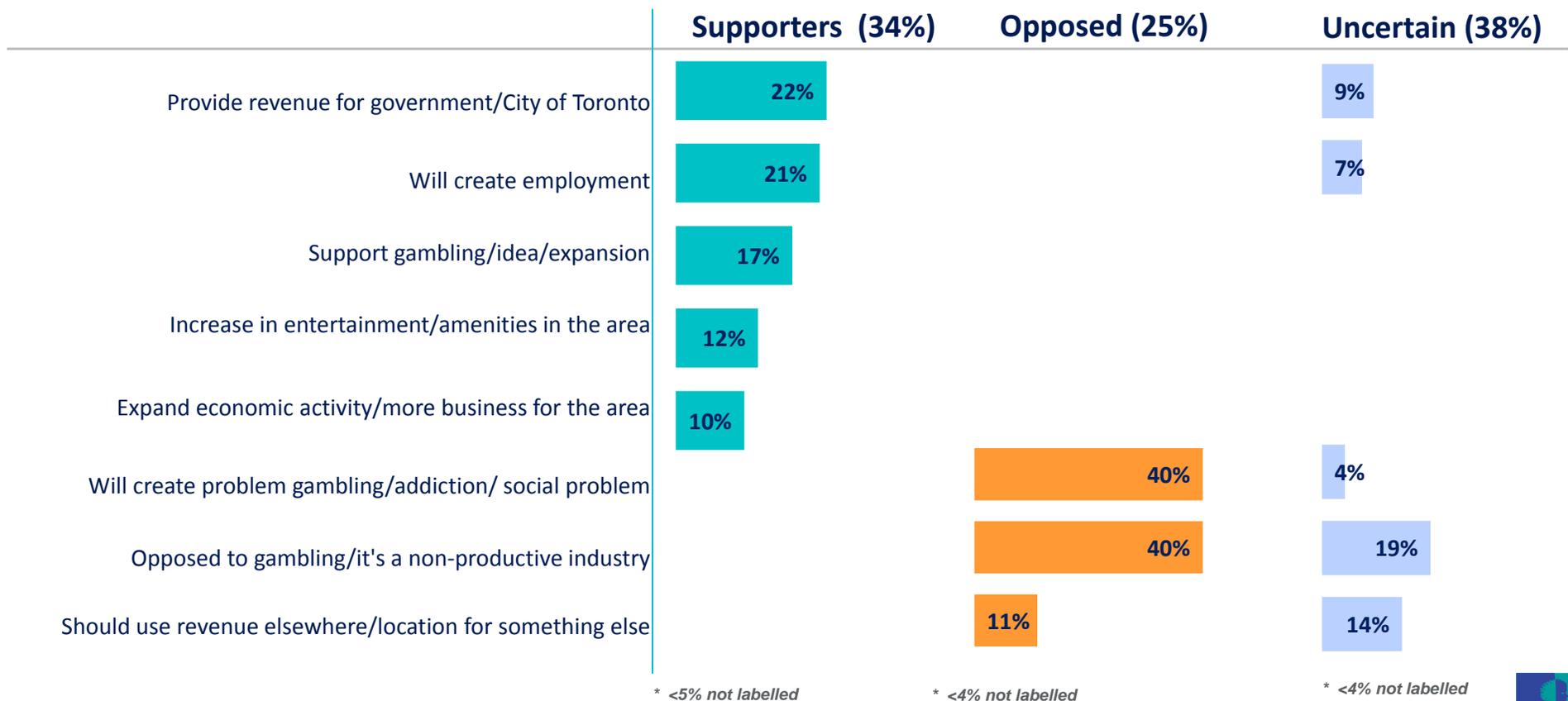


* <2% not labelled

Reasons for Support or Opposition To Expanding Gaming at Woodbine

- One in five residents who support expanding gaming at Woodbine Racetrack believe it will provide revenue for the City and the same percentage of residents believe it will create employment.
- Of those who oppose expansion, four in ten do not support the gambling industry in general or think that social problems such as increased problem gambling will follow. These concerns are echoed among those who are uncertain in their support or opposition of expansion.

Q3. Why do you support/oppose/feel this way about expanding gaming at Woodbine Racetrack?

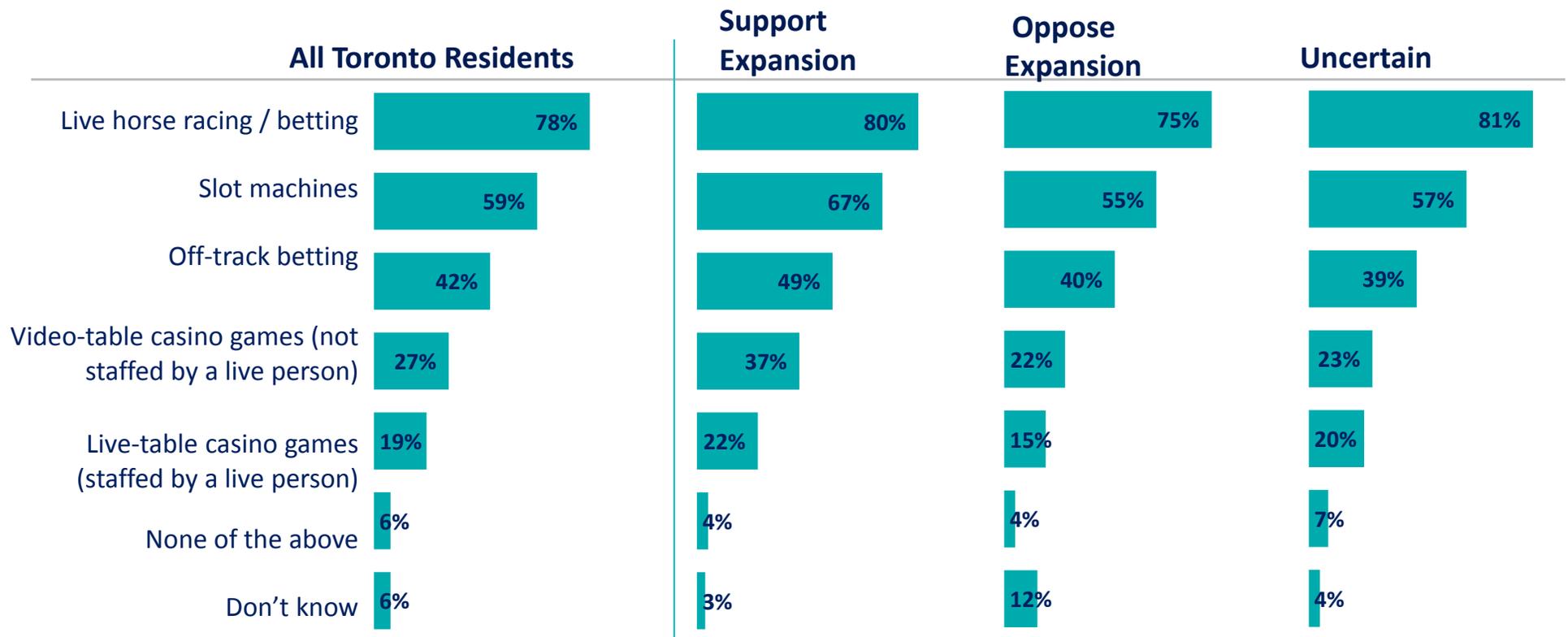


Base: Respondents who support (n=238); Respondents who oppose (n=175); Respondents uncertain/with mixed feelings (n=262)

Awareness of Current Gaming Activities At Woodbine

- Regardless of opinions towards the potential expansion of gaming at Woodbine, about eight in ten respondents are aware that live horse racing/betting is currently available at the Racetrack and roughly six in ten are aware of slot machines. The findings are close across all categories overall.
- Overall, those who support expansion are most aware of all available gaming types at Woodbine. In particular, supporters are significantly more aware of the availability of video-table casino games than those who oppose or are uncertain about expansion.

Q4. As far as you know what types of gaming are currently available at Woodbine Racetrack?

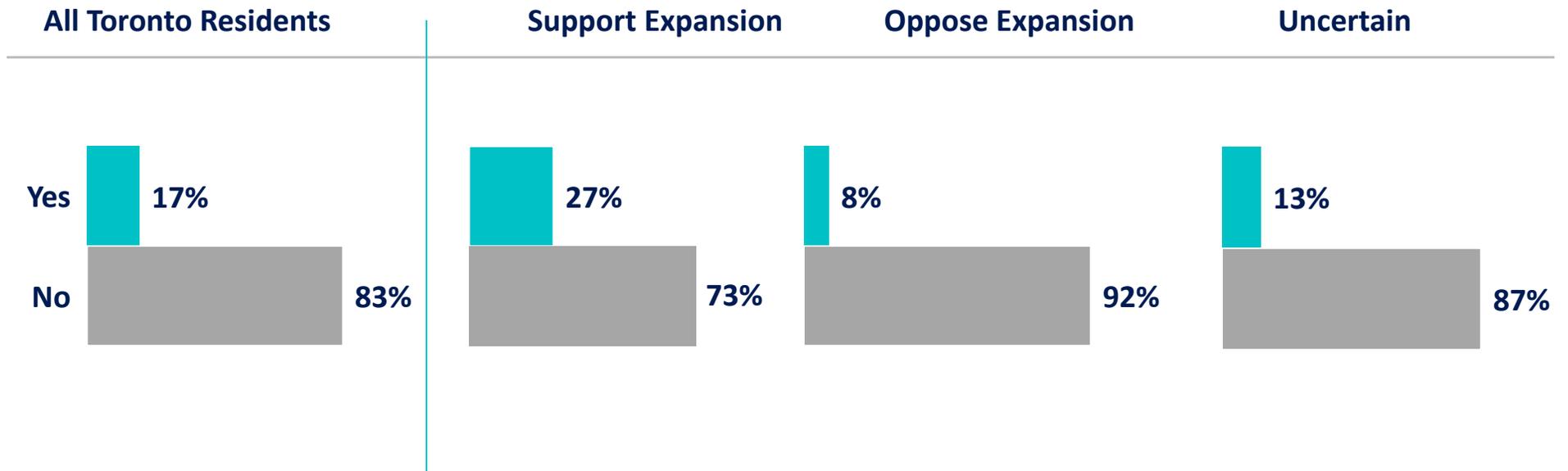


Base: All Toronto Residents (n=701)

Awareness of Expansions Activities Under Consideration

- Although half of Torontonians are generally aware that the City of Toronto is considering expanding gaming at Woodbine Racetrack, just under two in ten say they are aware of the details of the potential expansion.
- Those who support expansion are significantly more likely to be aware of these details compared to all others.

Q5. Currently, Woodbine Racetrack offers approximately 3000 slot machines and video-table casino games (not staffed by a live person) in addition to horse racing/betting. Are you aware that if the City of Toronto agrees to expanding gaming at Woodbine Racetrack, OLG and its operator could add up to 2000 slot machines and video-table casino games, to the existing 3000 and up to 400 live dealer tables?

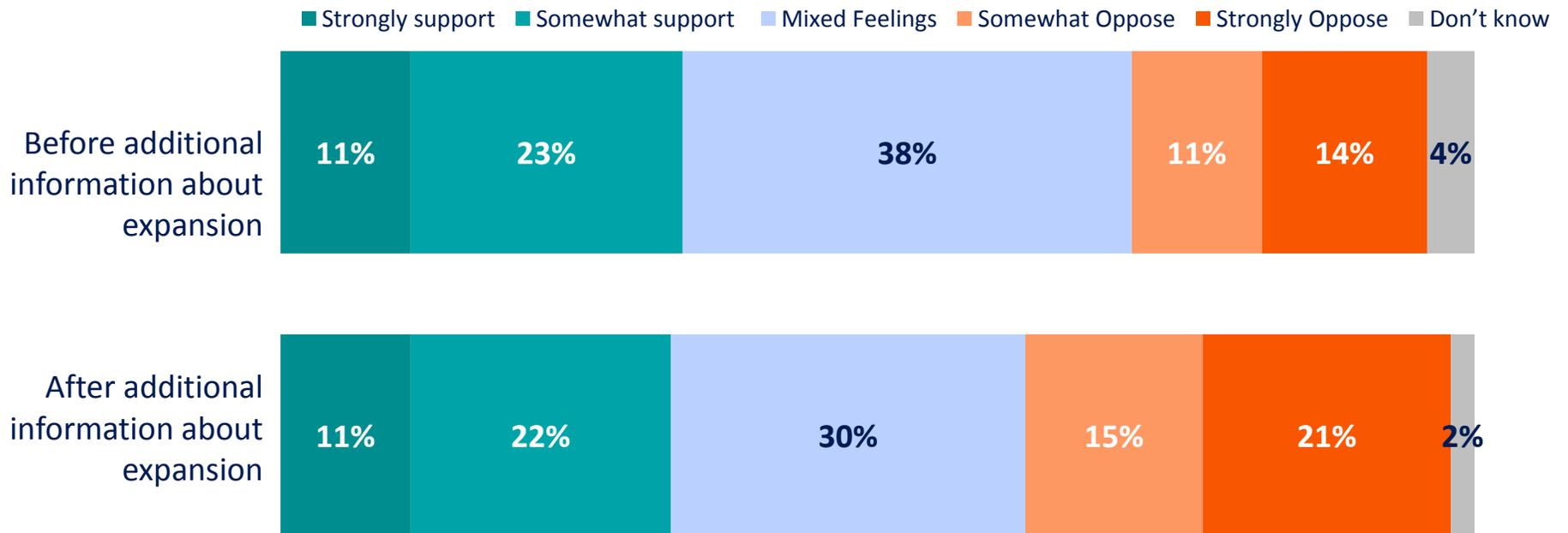


Base: All Toronto Residents (n=701)

Shift in Support and Opposition Once Provided Additional Information

- After being provided additional information regarding the details associated with expanded gaming, overall support remains consistent at 33%. Although the extra information did not have an effect on support, it did when it comes to opposition; those who somewhat or strongly oppose the Racetrack expansion rose 11 points from 25% (when asked generally) to 36% following this additional information.

Q6. With this additional information, to what extent do you support or oppose expanding gaming at Woodbine?

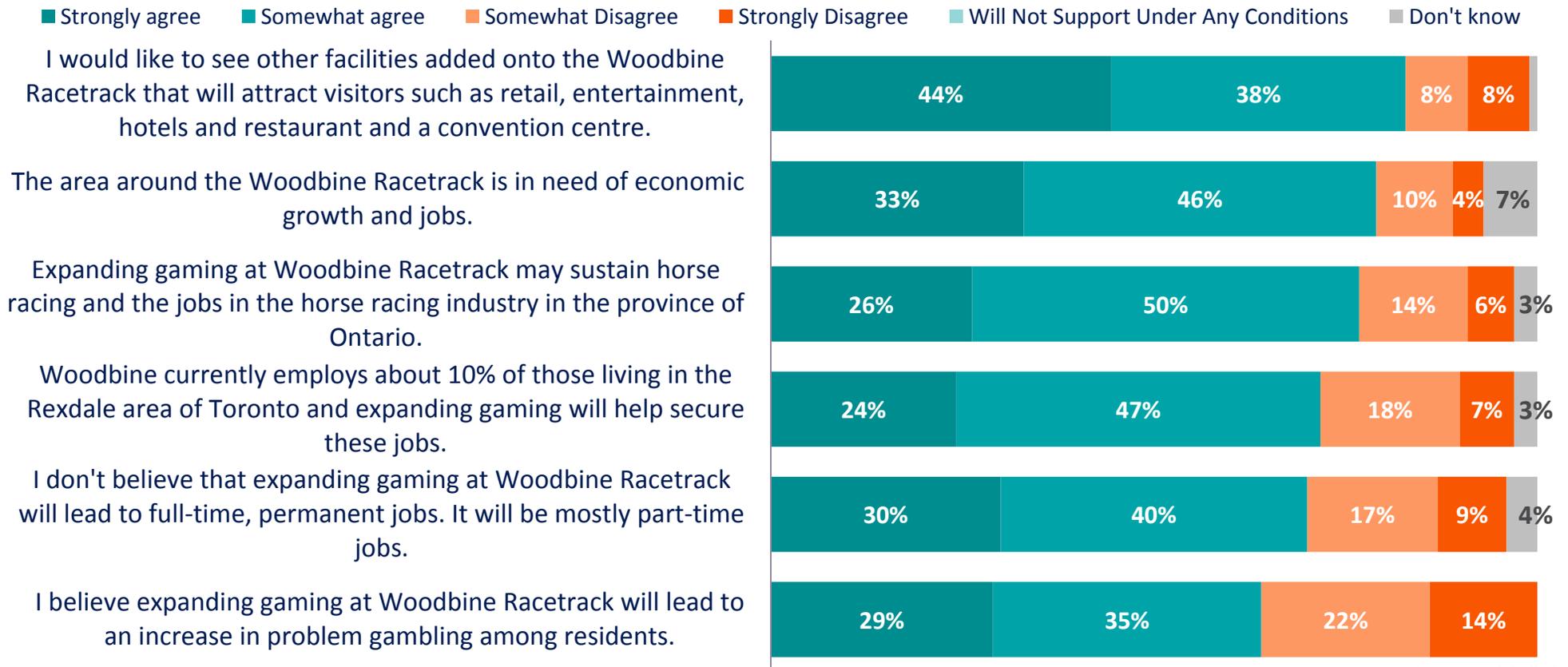


Base: All Toronto Residents (n=701); Neighbouring Area (n=200)

Attitudes Toward Expanding Gaming at Woodbine

- Eight in ten residents would like to see other facilities added onto the Woodbine Racetrack that will attract visitors and about the same percentage believe the area around Woodbine is in need of economic growth and jobs.
- Seven in ten don't believe that the expansion will lead to full-time, permanent jobs and nearly as many worry that expansion will lead to an increase in problem gambling.

Q7. Do you agree or disagree with the following statements?



* <3% not labelled

Base: All Toronto Residents (n=701)

Attitudes Toward Expanding Gaming at Woodbine (continued)

- Six in ten respondents agree that Woodbine has offered gaming through slots and electronic tables for the past 15 years without significant negative impacts on the community. As many worry that expanding gaming will lead to traffic congestion.
- Just over half of respondents don't believe there will be a significant increase in new visitors and as many agree that if expanding gaming in the GTA is going to happen anywhere they would prefer it happen in Toronto. Respondents are split on the impact of expansion on crime and public safety.

Q7. Do you agree or disagree with the following statements?

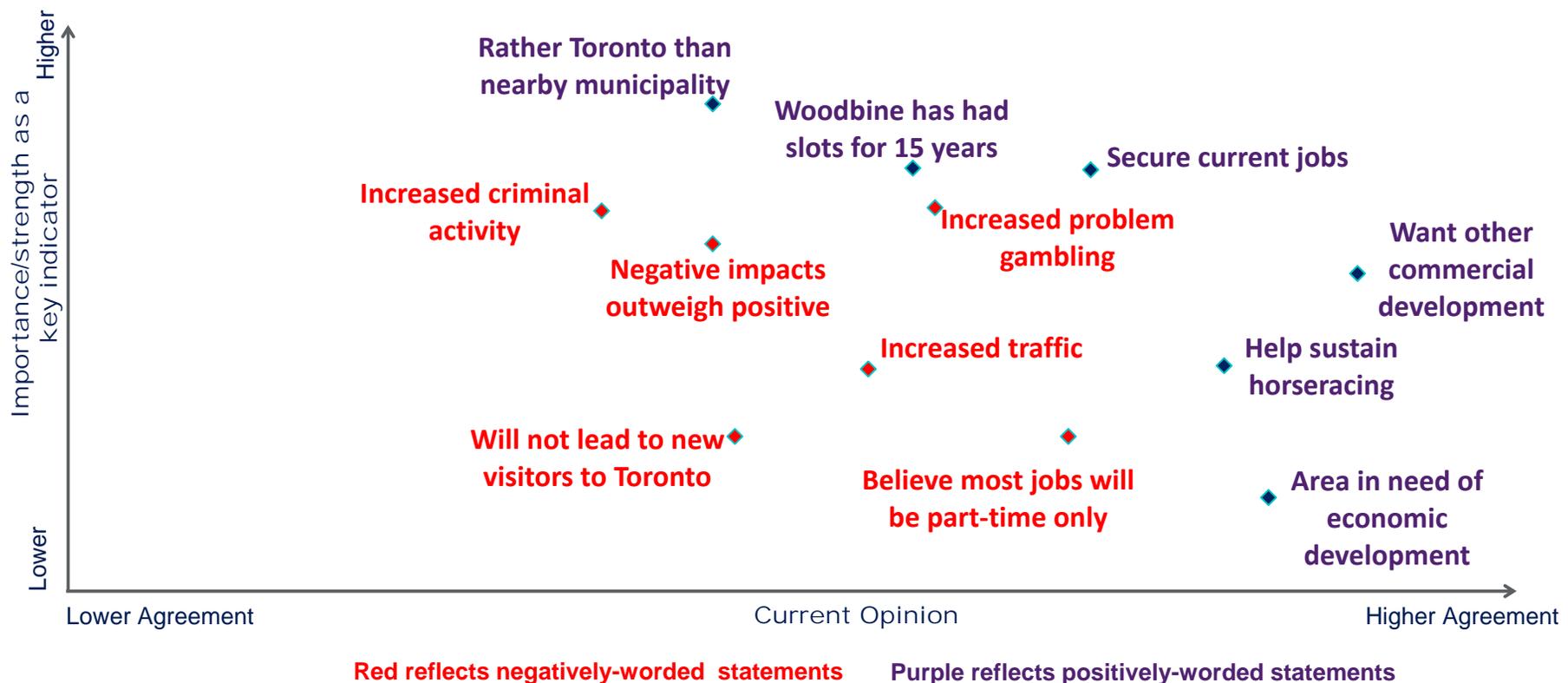


* <3% not labelled

Base: All Toronto Residents (n=701)

Key indicators of Support/Opposition to Expanding Gaming

In the chart below, each of the main factors related to support or opposition to the expansion measured in the survey are plotted based on two components - how strong of an indicator it is of whether or not individuals currently support or oppose the possible expansion (vertical axis) and the current level of agreement among the public (horizontal axis). Focusing on the areas of greatest agreement (the desire for commercial development) and on the top key indicators (addressing why expansion should be in Toronto and not a nearby municipality; demonstrating that existing slots and electronic tables at Woodbine have not had a negative impact on the community; and, that expansion will secure current jobs) would likely lead to greater support.

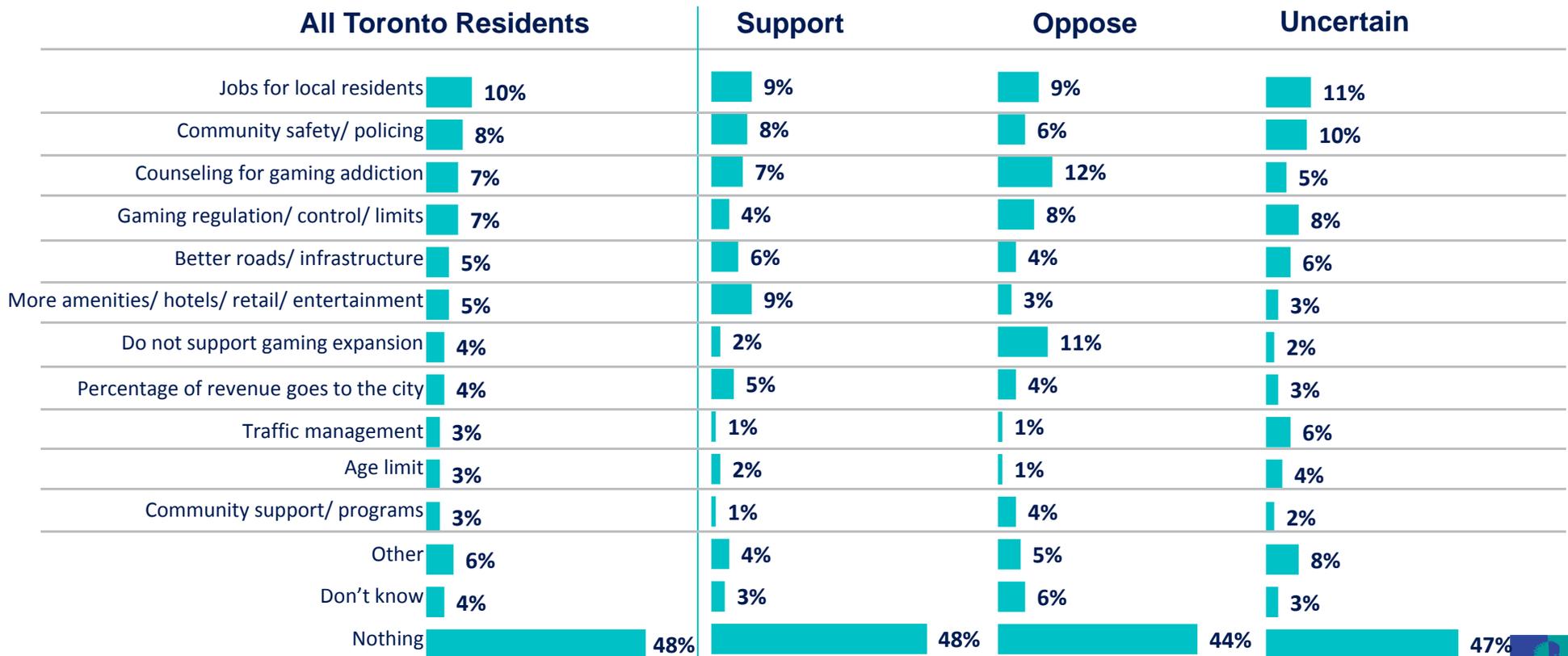


Importance reflects the correlation co-efficient against Q2 (support/oppose) Current opinion reflects top 2 box (strongly agree and somewhat agree)

Desired Conditions

- When asked what conditions the City should request of the Province, OLG and the casino operator, if it approves the expansion, 48% of residents do not offer a suggestion. Of those residents who want the City to request conditions the most frequently mentioned are (in descending order, but close in magnitude): jobs for local residents, community safety/policing, counselling for gambling addiction, greater gaming control and regulation, better roads/infrastructure and commercial development.

Q8. City Council has the opportunity to request conditions to the Province and the Ontario Lottery and Gaming Corporation (OLG) if it approves expanding gaming at Woodbine Racetrack. What conditions, if any, would you like City Council to request if it approves expanding gaming?

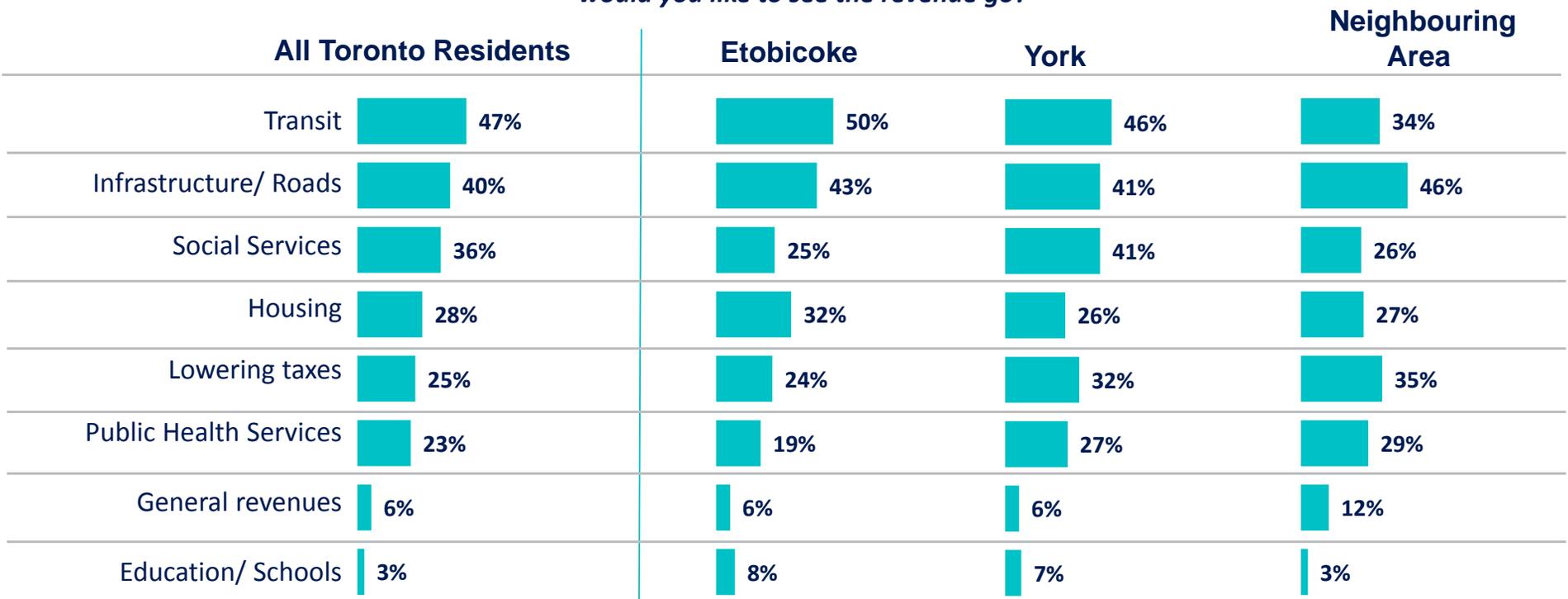


Base: All Toronto residents (n=701)

Directed Revenue

- If gaming at Woodbine were to be expanded and the City were to direct the increased revenue to a specific service rather than general revenues, the largest share (47%) would like it to be put towards transit or infrastructure/roads (40%).
- Those in the neighbourhood that would be most affected by the expansion, prefer revenue be directed toward infrastructure/roads than transit and are disproportionately more interested in lowering taxes, and public health services.

Currently, the City receives roughly \$15 million annually in gaming revenue from Woodbine Racetrack as a hosting fee. Expanding gaming has the potential to increase the hosting fee by \$10-20 million to a total of \$25-\$35 million annually Q9. If revenue generated from expanding gaming at Woodbine Racetrack were to be directed to a specific City Service rather than general revenues, where would you like to see the revenue go?



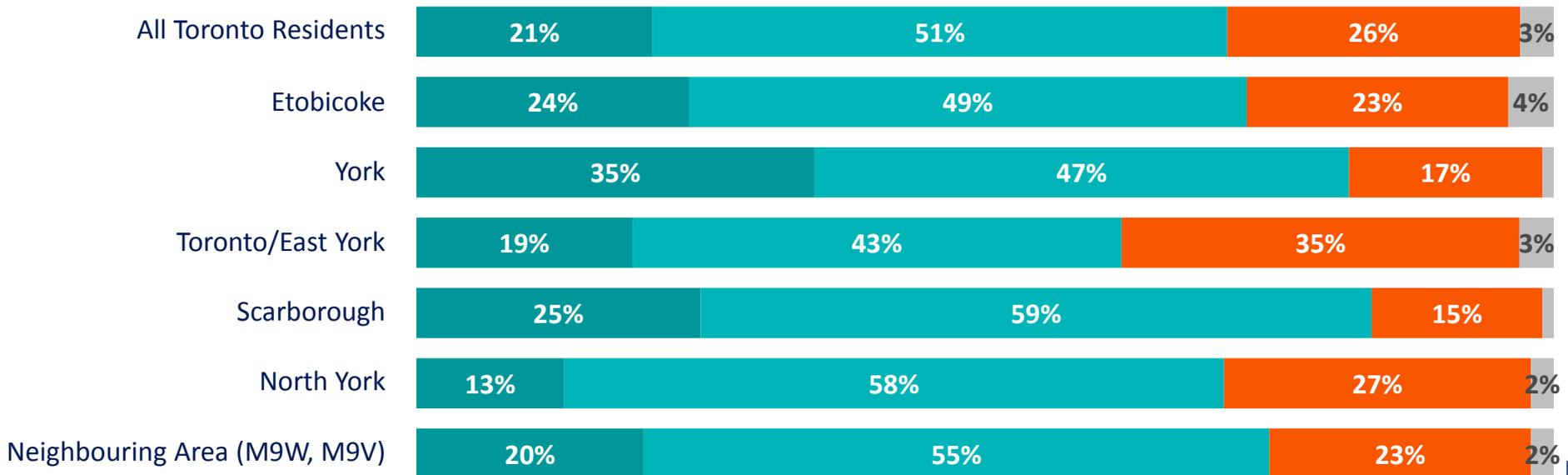
Base: All Toronto Residents (n=701); Neighbouring Area (n=200)

Support and Opposition on Condition of Commercial Development By Place of Residence

- Respondents are much more likely to support expanding gaming at Woodbine if it were to be paired with commercial development such as hotels or restaurants; half agree that they would support expansion with this condition compared to the two in ten who would support expanding gaming regardless of commercial development.
- Those in the Toronto/East York region are significantly less likely to have their opposition swayed in this regard than respondents in most other regions.

Q9A. OLG will decide whether or not expanding gaming at Woodbine will include new commercial development, such as hotels, restaurants and entertainment venues. Which is closest to your view?

- I support expanding gaming at Woodbine regardless of whether or not it comes with new commercial development such as hotels, restaurants or entertainment venues.
- I support expanding gaming at Woodbine only if the expansion brings new commercial development such as hotels, restaurants or entertainment venues.
- I oppose expanding gaming at Woodbine regardless of where or not it comes with new commercial development such as hotels, restaurants or entertainment venues.
- Don't know



Base: All Toronto Residents (n=701); Neighbouring Area (n=200)

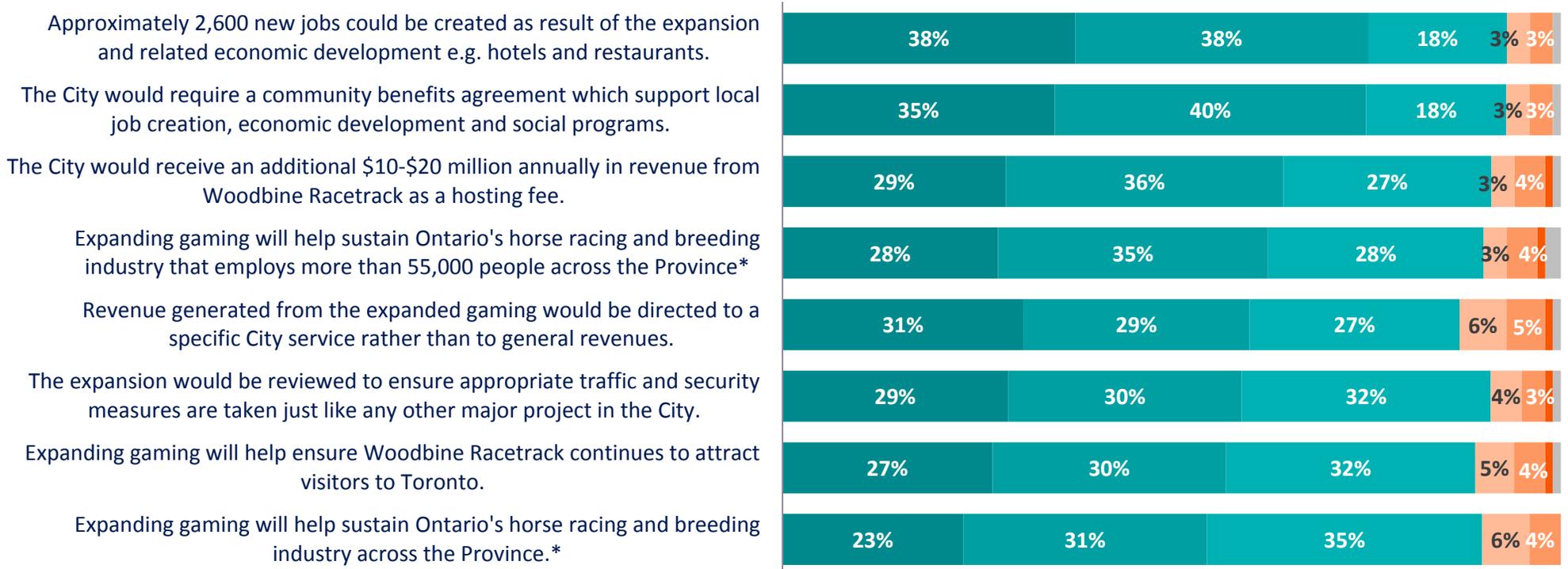
* <2% not labelled

Public Reaction to Specific Benefits / Conditions

- All of the benefits/conditions mentioned bolster support among the majority of residents.
- Three-quarters of Torontonians would be more likely to support expanding gaming at Woodbine if 2,600 new jobs were to be created as a result of the gaming and commercial development and if the City were to enact a community benefits agreement in support of local job creation, economic development and social programs. These are also the most compelling benefits to those who initially oppose expansion before receiving additional information.

Q10. If the information I read could be guaranteed, tell me if you would be much more, somewhat more, somewhat less, or much less likely to support expanding gaming at Woodbine Racetrack. If it makes no difference please say so.

■ Much more ■ Somewhat more ■ Makes no difference ■ Somewhat less ■ Much less ■ Will not support under any conditions ■ Don't know



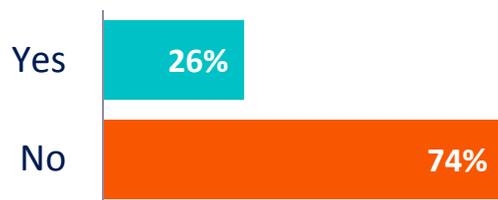
* <3% not labelled

Base: All Toronto Residents (n=701) *These statements were split sampled.

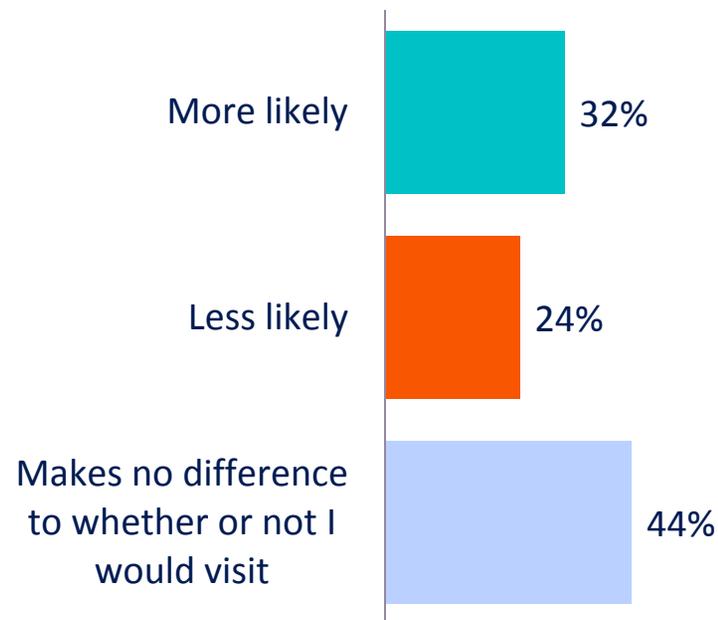
Impact on Likelihood to Visit Woodbine Racetrack

- Among the quarter of respondents who have visited the Woodbine Racetrack in the last 5 years, two-thirds have done so one to three times.
- If expanded gaming is implemented, one-third of residents would be more likely to visit the Racetrack while one-quarter state that they would be less likely to do so. However, 44% indicate that it would make no difference to them.

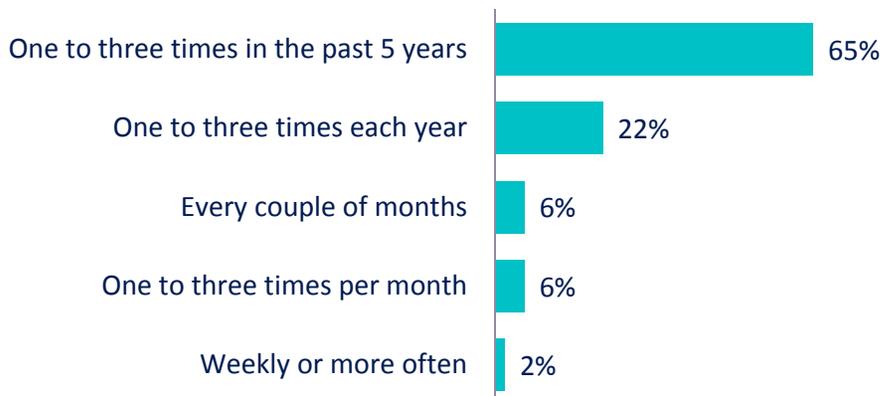
Q11. Have you visited Woodbine Racetrack in the past 5 years?



Q13. If expanded gaming goes ahead at Woodbine Racetrack, would you be more or less likely to visit?



Q12. Approximately how often have you visited Woodbine Racetrack in the past 5 years?



Additional Comments

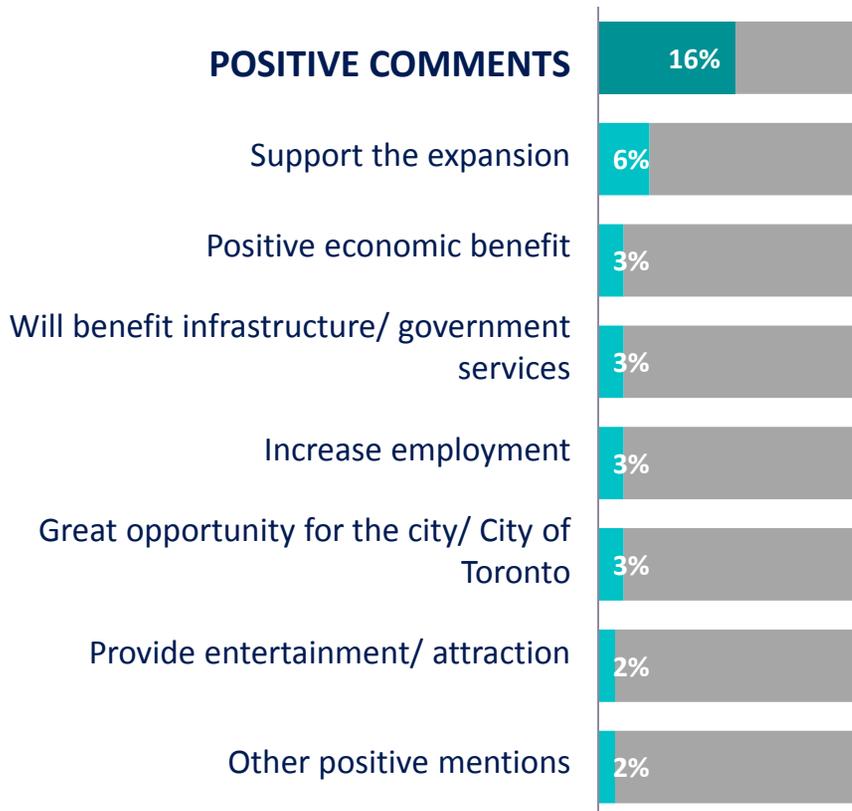
- Seven in ten did not provide any additional comments regarding the potential expansion of gaming at Woodbine Racetrack; among those that did, the most frequent comments reinforced their support or opposition to the expansion.

Q14. Do you have any general comments to provide?

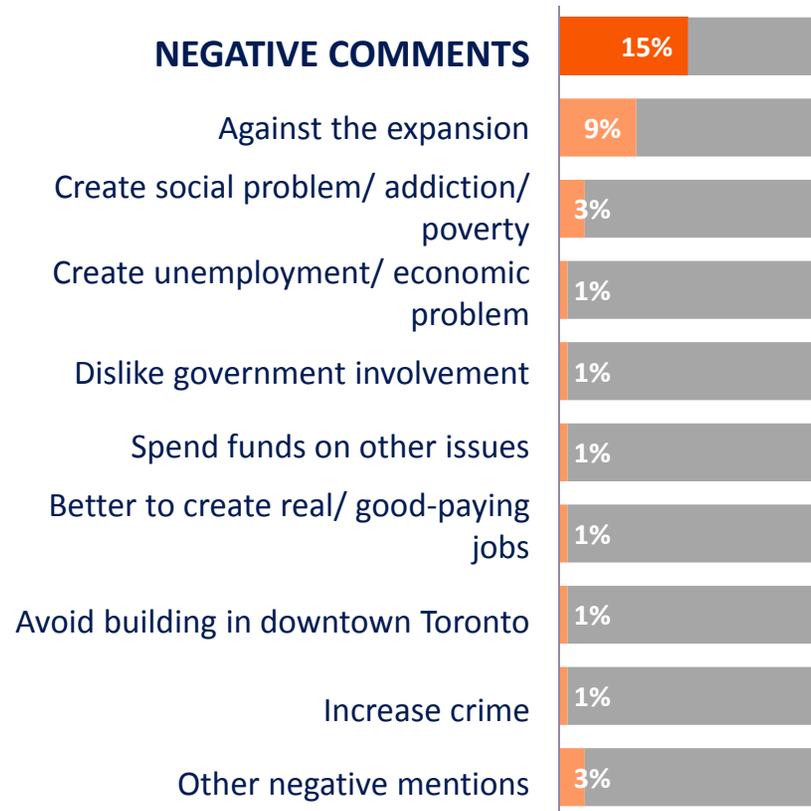
No Comment Offered

68%

POSITIVE COMMENTS



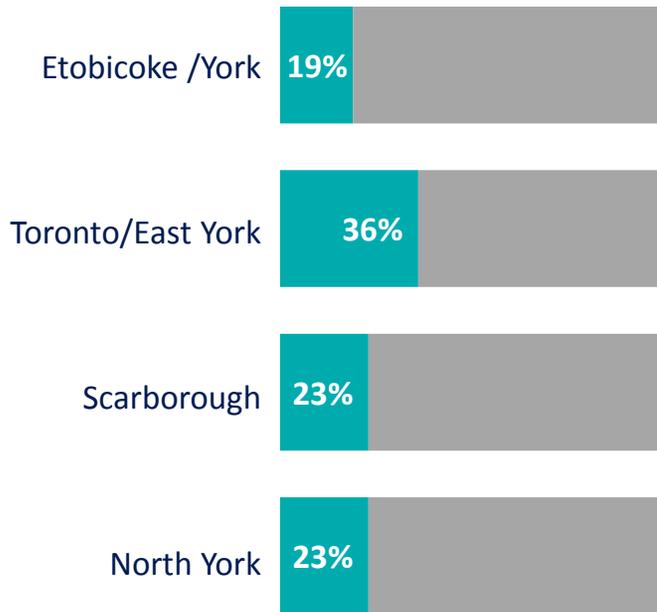
NEGATIVE COMMENTS



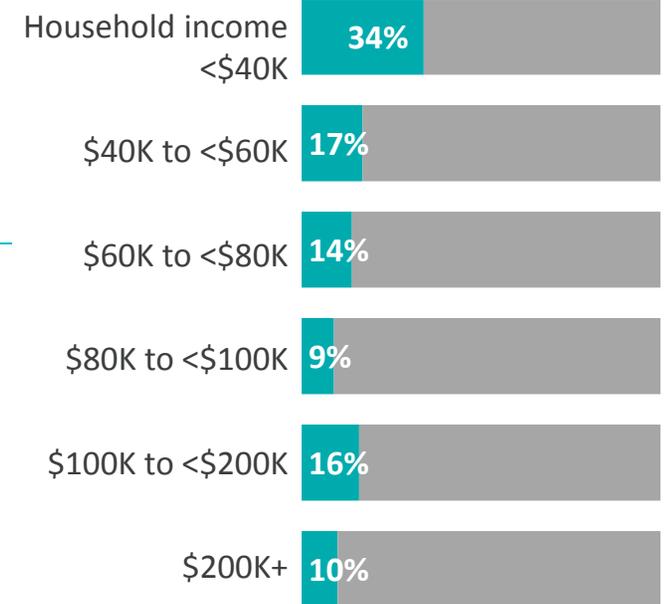
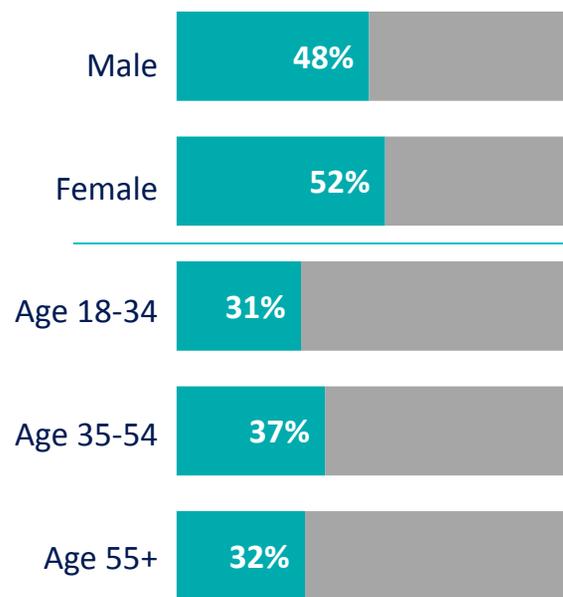
Base: All Toronto Residents (n=701)

Respondent Profile (n=701 Toronto Residents)

Place of Residence



Age, Gender and Household Income



For more information contact

Sandra Guiry
sandra.guiry@ipsos.com

Kanan Kothari
Kanan.kothari@ipsos.com





Public Consultation on the Woodbine Racetrack Casino

Online Survey

Final Report: June 15, 2015





Introduction

The City of Toronto is considering expanding gaming at Woodbine Racetrack.

Ipsos Reid was commissioned to gather evidence of public views towards a possible expansion via:

1. a city-wide telephone poll of residents to provide statistically representative results of the opinions of Toronto residents;
2. an online survey posted on toronto.ca that was open to anyone who was interested in providing feedback to the City; and,
3. a public meeting open to anyone who was interested in attending.

This report outlines the results of the online survey.

The screenshot shows the City of Toronto website with the following elements:

- Header:** City of Toronto logo, search bar with "How can we help you?" dropdown, and a search button.
- Main Content:** "Woodbine Racetrack Casino public consultations" title. A sidebar on the right titled "Woodbine Racetrack Casino Consultations" contains the text: "The City wants your input before making a decision on expanding gaming at Woodbine Racetrack. What should City Council consider?"
- Navigation Menu:**
 - LIVING IN TORONTO:** News for residents and new Canadians. Use public transit or cycle to events. Pay a ticket, visit parks to find programs. Learn about services, complaints and the city's wellbeing.
 - DOING BUSINESS:** Services to help start, operate and grow your business. Access incentives, investment opportunities, planning, building and licensing info. Learn about selling to the City.
 - VISITING TORONTO:** New to the city? How to get around, what to do and where to go. Enjoy special events, explore city museums, cultural centres, and shop in downtown's underground walkway.
 - ACCESSING CITY HALL:** Learn about council, bylaws, notices and accountability. Contact the Mayor your councillor or the City Manager's Office. Get involved. Find jobs. Visit the Newsroom.
- Promotional Banners:**
 - Pan Am Games:** July 10-26, 2015. 65 days to go!
 - Parapan Am Games:** August 7-15, 2015. 93 days to go!
- Footer:** Google Translate, "in 52 languages", "3-1-1 Call or click 24/7", "Contact us | Accessibility | Connect | Search maps | Privacy | © City of Toronto, 1998-2015".

The screenshot shows the "Woodbine Racetrack Casino Public Consultation" page with the following content:

- Navigation Menu:** Get Involved, Consultations, Past Consultations, Woodbine Casino Consultation (highlighted), Learning Guides, Infrastructure Projects, Understanding Your City, Participatory Budgeting.
- Section Title:** Woodbine Racetrack Casino Public Consultation
- Text:** "The City of Toronto is looking for public input before making a decision on expanding gaming at Woodbine Racetrack. What do you want City Council to consider?"
- Public Meeting:** Monday May 11, 2015. Please plan on attending our open house to learn more and speak about this issue. Displays, presentations and staff will provide information about the Woodbine Racetrack location, the Ontario Lottery and Gaming Corporation's (OLG) process for potential gaming sites, and this consultation. Staff will be on hand to answer your questions and record public remarks.
 - Etobicoke Olympium, 2nd floor Lounge, 590 Rathburn Road, Toronto
 - 6:30 - 7:30 p.m. Open House
 - 7:30 - 9:30 p.m. Brief presentation, questions and public comments
- Executive Committee Meeting:** City Council's Executive Committee will consider the City Manager's report on this issue in June. For information, visit toronto.ca/council.
- Have Your Say:** Find out how you can participate in the Woodbine Racetrack Casino Public Consultation process. (Accompanied by an image of hands being clasped together).



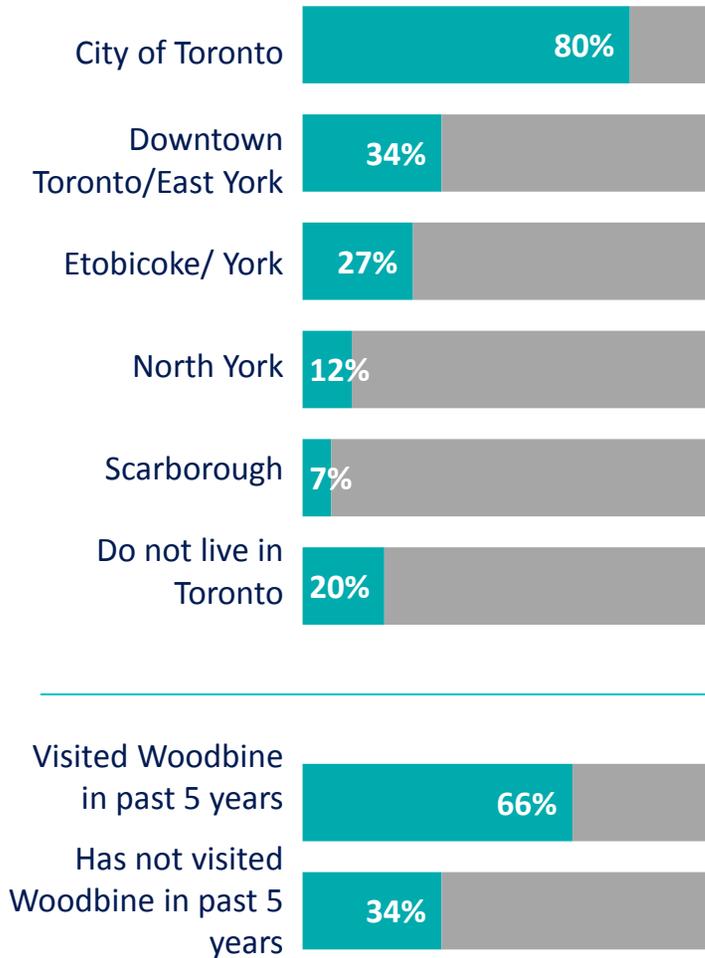
Research Methodology

- This report presents the results of an online survey posted to the **Woodbine Racetrack Casino Consultation Page**. The survey was open between **May 6 and 29, 2015**.
- The survey was open to anybody who chose to complete it and therefore, the sample of those who completed it and their opinions should be not be viewed as statistically representative of the residents of Toronto. This information is collected to assist the City to better understand the positions and interest of Torontonians.
- A total of **n=465 surveys were completed**.
- The data has not been statistically weighted.
- Throughout the report totals may not add to 100% due to rounding or because the question was a multi-select question, where respondents were permitted to choose more than one response.

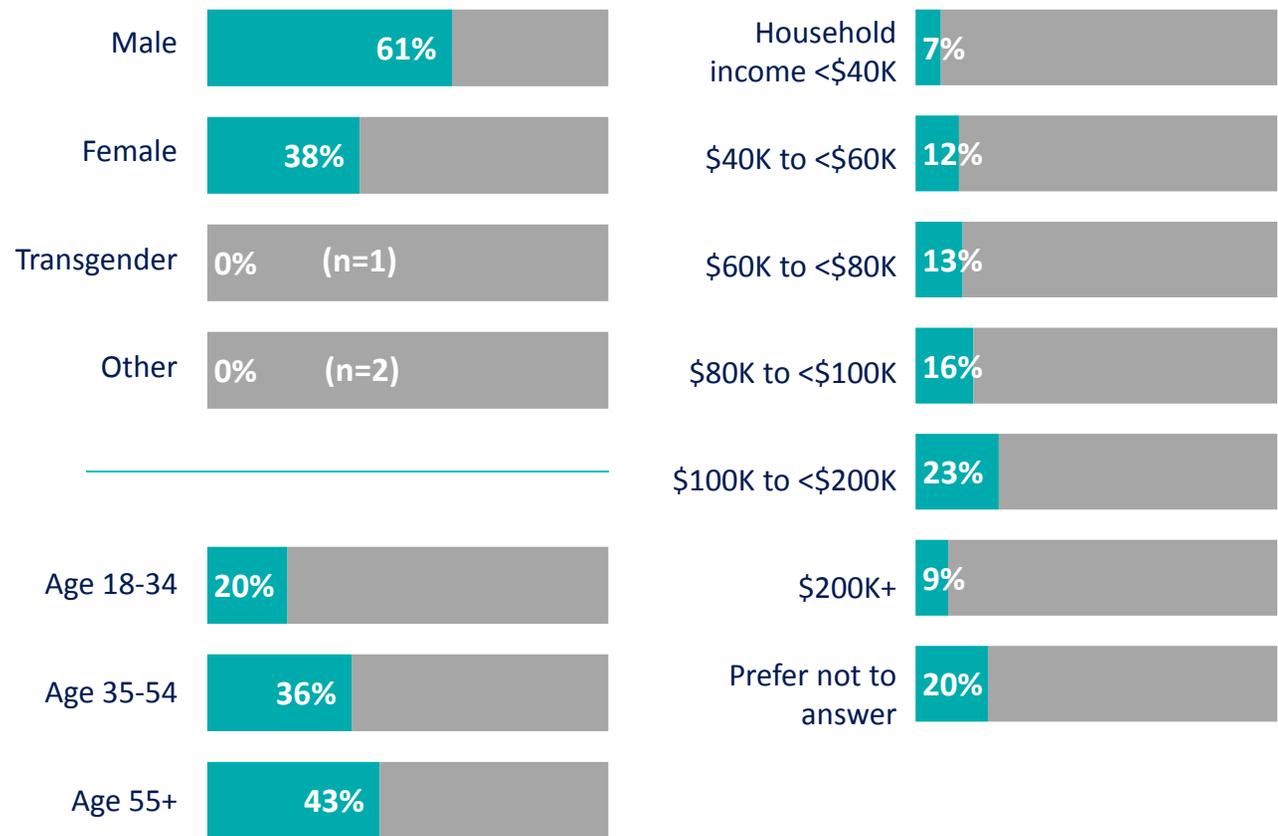
Who Completed the Survey

Total respondents: n=465

Place of Residence



Age, Gender, Household Income



Executive Summary



Executive Summary

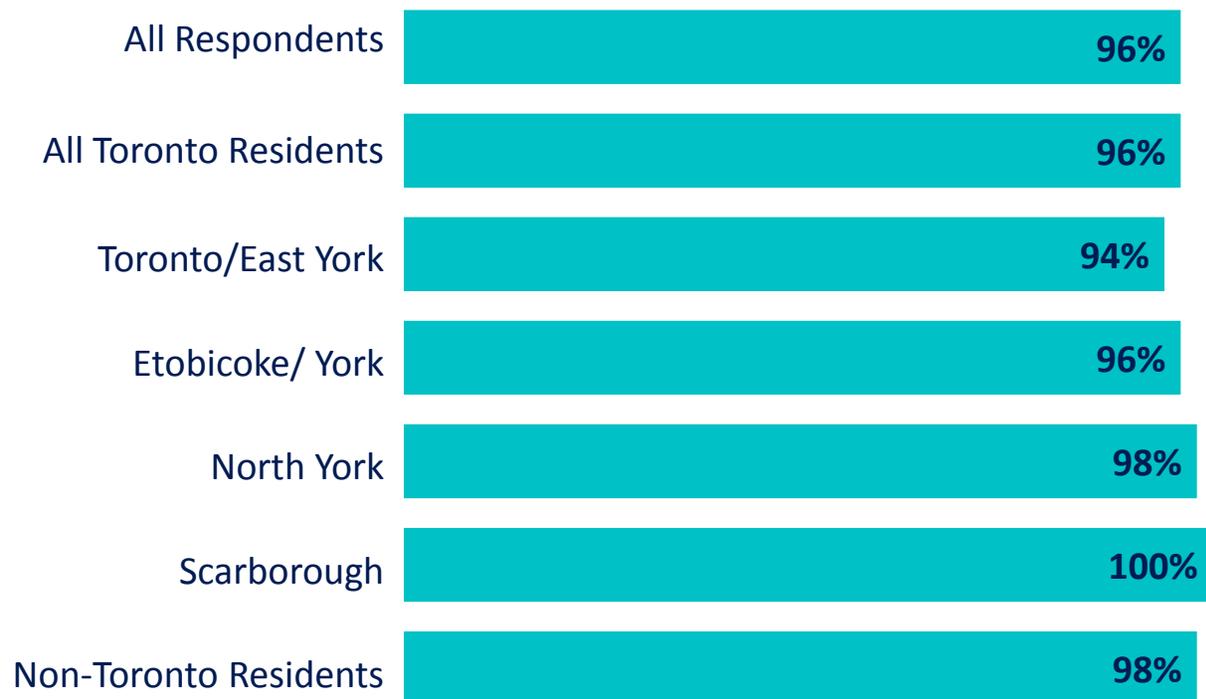
- Eighty percent of those who completed the online survey indicate they were a resident of Toronto
- Nearly all of those who completed the survey (96%) were aware of the expansion (dramatically higher than the average among residents per the City-wide telephone poll).
- Initially 65% indicate support for the expansion, 24% oppose it and the remainder have mixed feelings or don't know (11%).
- Over half of those who completed the survey indicated being aware of the estimated number of slots and live tables that would be added with the expansion. Thus, after reading the number, support and opposition does not change significantly – 65% support and 27% oppose.
 - ⇒ 82% agree the area is in need of economic growth and jobs.
 - ⇒ 79% agree that the expansion will create new jobs.
 - ⇒ 79% want new commercial development as part of the expansion.
 - ⇒ 71% believe the expansion will help sustain the horseracing industry.
 - ⇒ 70% believe the expansion will help secure the jobs of those currently employed at Woodbine.
- Counselling for gambling addiction, greater regulations of gaming and creating jobs for local residents are the most frequently mentioned conditions respondents who currently oppose the expansion would like to see the City request from OLG and casino operators.

Detailed Results

Awareness of Expanding Gaming at Woodbine Racetrack

- Almost all of the respondents who completed the survey were aware that the City of Toronto is considering the expansion of gaming at Woodbine Racetrack.

Q3. Are you aware that the City of Toronto is considering whether or not to approve expanding gaming at Woodbine Racetrack?



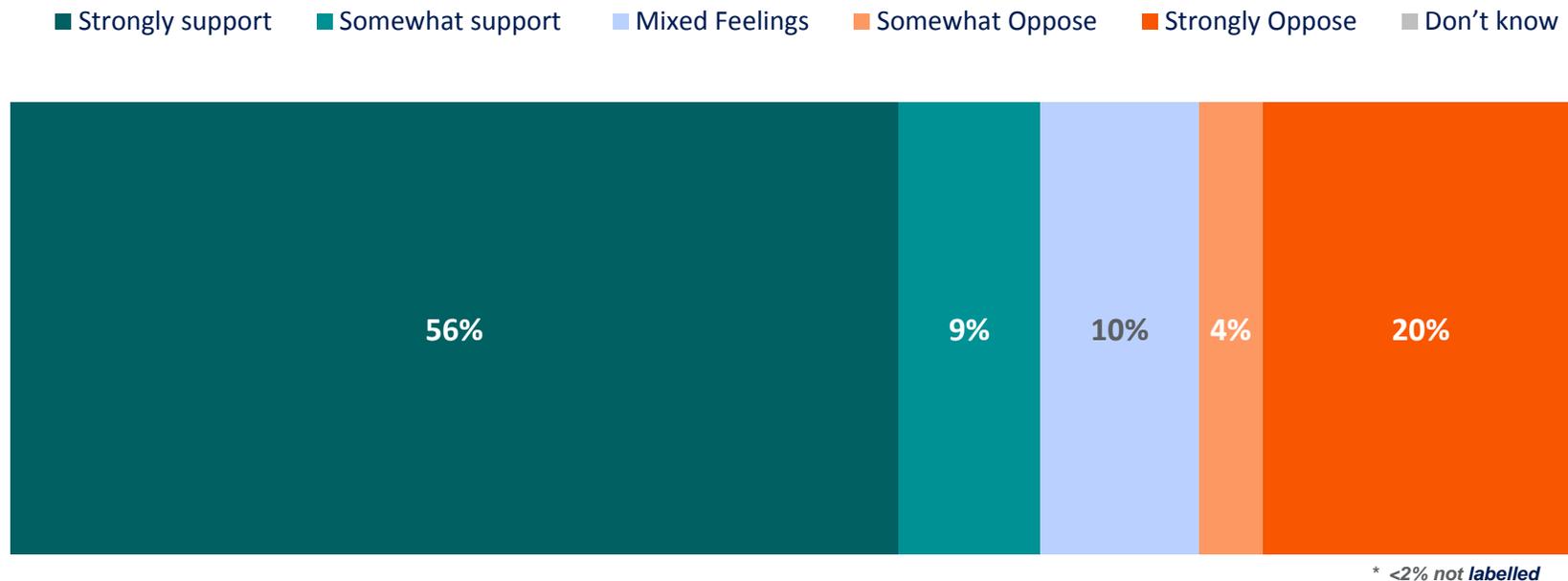
Base: All respondents (n=465)

Support and Opposition To Expanding Gaming at Woodbine Racetrack

All Respondents

- Two-thirds of respondents strongly or somewhat support expanding gaming at Woodbine Racetrack. A quarter (24%) are opposed while one in ten (11%) have mixed feelings or do not know how they feel about expansion.

Q4. To what extent do you support or oppose expanding gaming at Woodbine Racetrack?

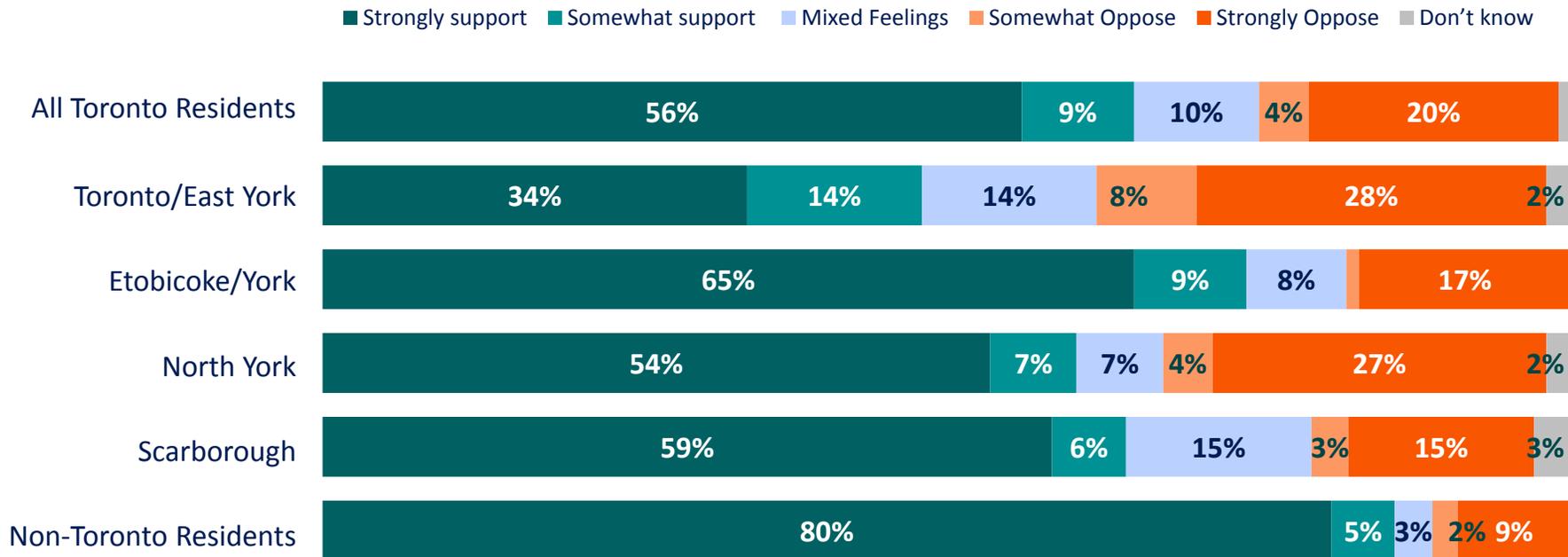


Base: All respondents (n=465)

Support and Opposition To Expanding Gaming at Woodbine Racetrack By Place of Residence

- Non-Toronto residents, which represent 20% of all respondents are the strongest supporters (85% strongly or somewhat support) of expanding gaming at Woodbine Racetrack, followed by those who live in Etobicoke/York (74%), Scarborough (65%) and North York (61%) residents.
- Less than half of Toronto/East York residents (48%) support the expansion.

Q4. To what extent do you support or oppose expanding gaming at Woodbine Racetrack?



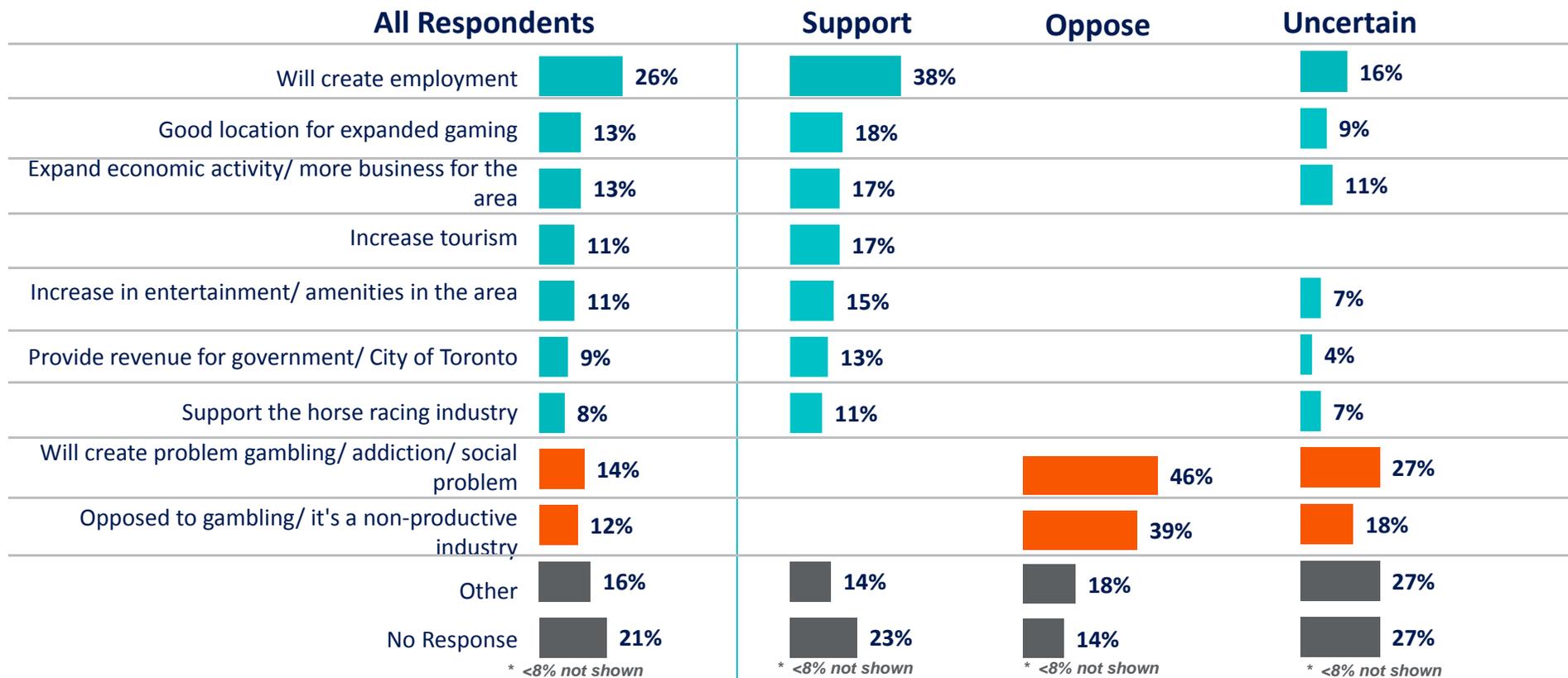
* <2% not labelled

Base: All respondents (n=465)

Reasons for Support and Opposition

- Among respondents who support expanding gaming at Woodbine Racetrack, an increase in the number of employment opportunities (38%), economic activity (17%), tourism (17%) and entertainment in the area (15%) are noted as the key benefits. Several (18%) also feel it is a good location for expanded gaming.
- Many of those who oppose the proposal feel it will create social problems (46%) and are generally opposed to the idea of gambling itself (39%). Respondents who are uncertain are more likely to cite similar reasons for opposing than supporting the expansion of gaming at Woodbine.

Q5. Why do you support/oppose/feel this way about expanding gaming at Woodbine Racetrack?

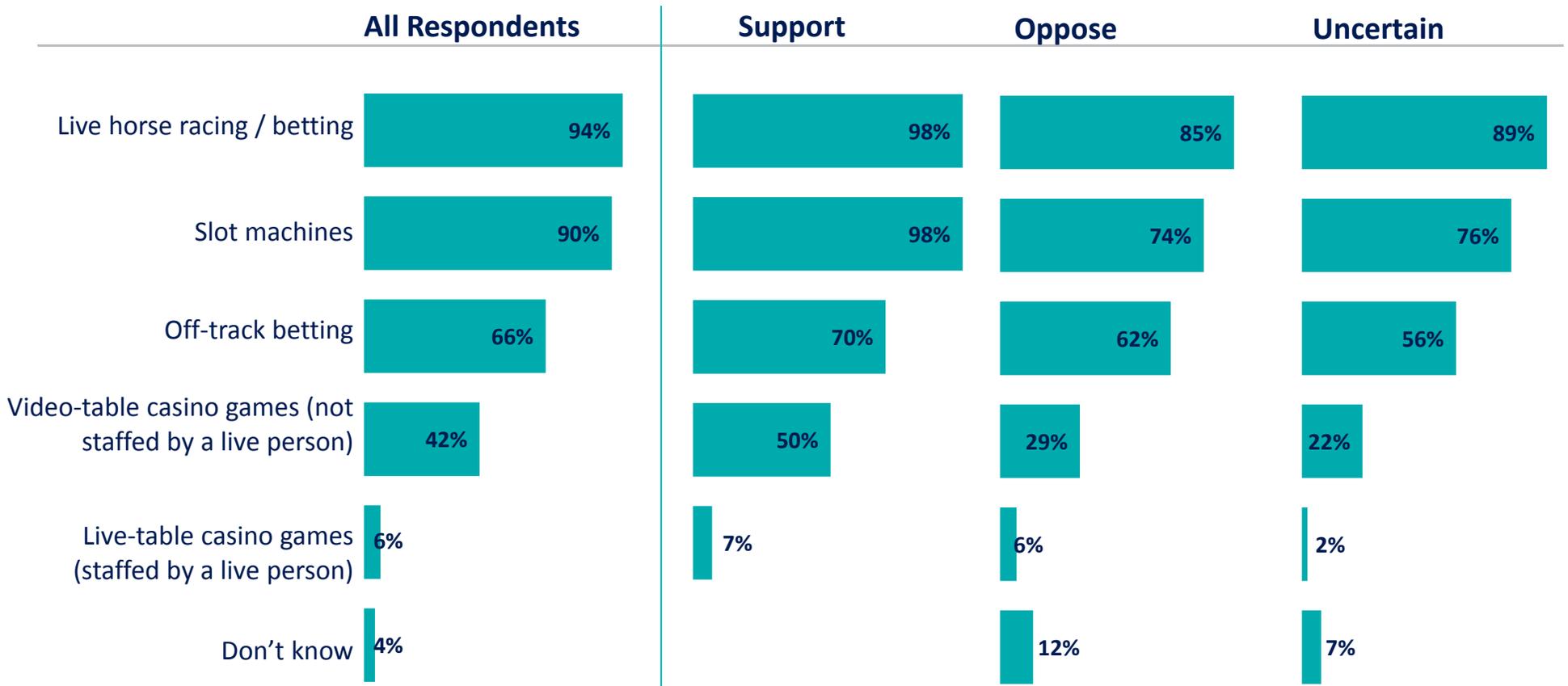


Base: Respondents who support/oppose/feel expanding gaming at the Woodbine Racetrack (n=460)

Awareness of Current Gaming Activities At Woodbine

- The vast majority of respondents are aware of live horse racing/betting and slot machines at Woodbine Racetrack. Over two-thirds are aware of the off-track betting, and less than half know about video-table casino games.
- Those who oppose or who are uncertain are more likely to say they don't know what is currently available.

Q6. As far as you know what types of gaming are currently available at Woodbine Racetrack?



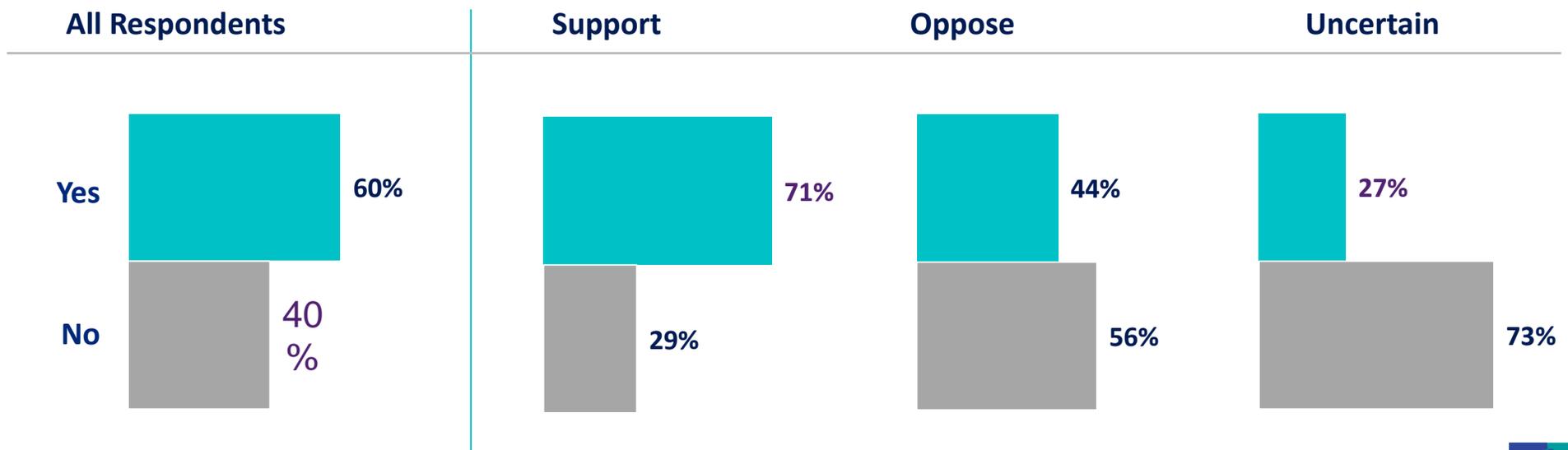
Base: All respondents (n=465)

Awareness of the Expanded Gaming Under Consideration

- Sixty percent of all respondents say they are aware that if the proposal is accepted, Woodbine Racetrack will have up to 2000 more slot machines and video-table casino games and up to 400 live dealer tables. Seven in ten of those who support the proposal say they are aware, while 44% of those who oppose state the same. Awareness is much lower among those who are uncertain.

Currently, Woodbine Racetrack offers approximately 3000 slot machines and video-table casino games (not staffed by a live person) in addition to horse racing/betting. Are you aware that if the City of Toronto agrees to expanding gaming at Woodbine Racetrack, OLG and its operator could add up to 2000 slot machines and video-table casino games, to the existing 3000 and up to 400 live dealer tables.

Q7. Are you aware that if the City of Toronto agrees to expanding gaming at Woodbine Racetrack, OLG and its operator could add up to 2000 slot machines and video table casino games to the existing 3000, and up to 400 live dealer tables?

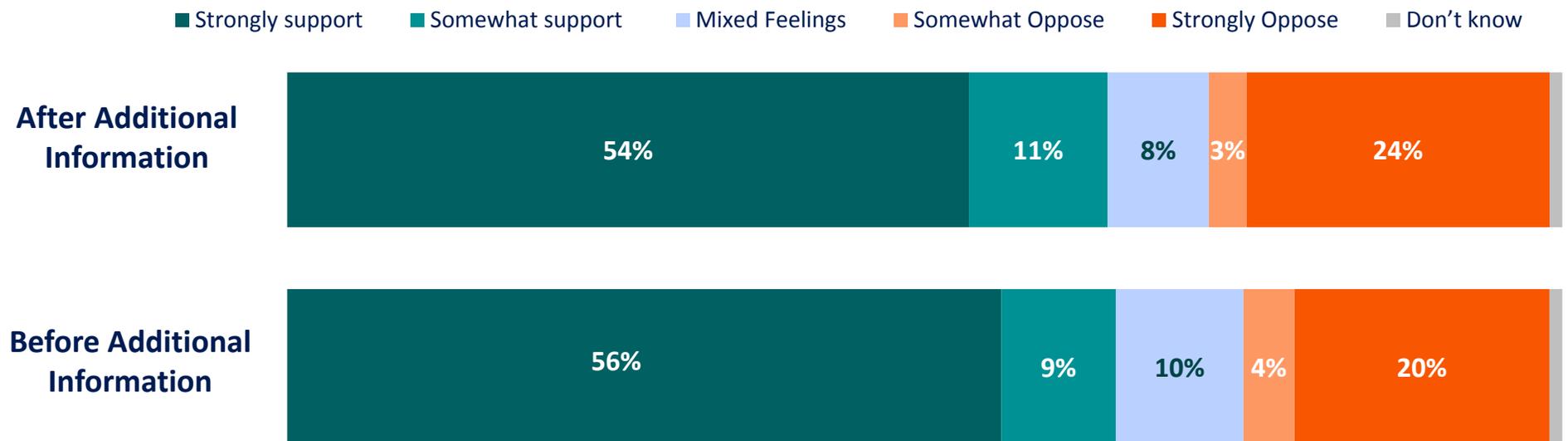


Base: All respondents (n=465)

Support and Opposition Once Provided Information on the Expansion By All Respondents

- With additional information that there will be 2000 additional slot machines and video-table casino games and up to 400 live dealer tables, there is little to no change in the proportions of those who support expansion of gaming at Woodbine Racetrack, but a very slight shift of those who were initially on the fence lean towards strongly opposing the proposal.

Q8. If the City of Toronto agrees to expanding gaming at Woodbine Racetrack, OLG and its operator could add up to 2000 slot machines and video-table casino games, to the existing 3000 and up to 400 live dealer tables. With this additional information, to what extent do you support or oppose expanding gaming at Woodbine?



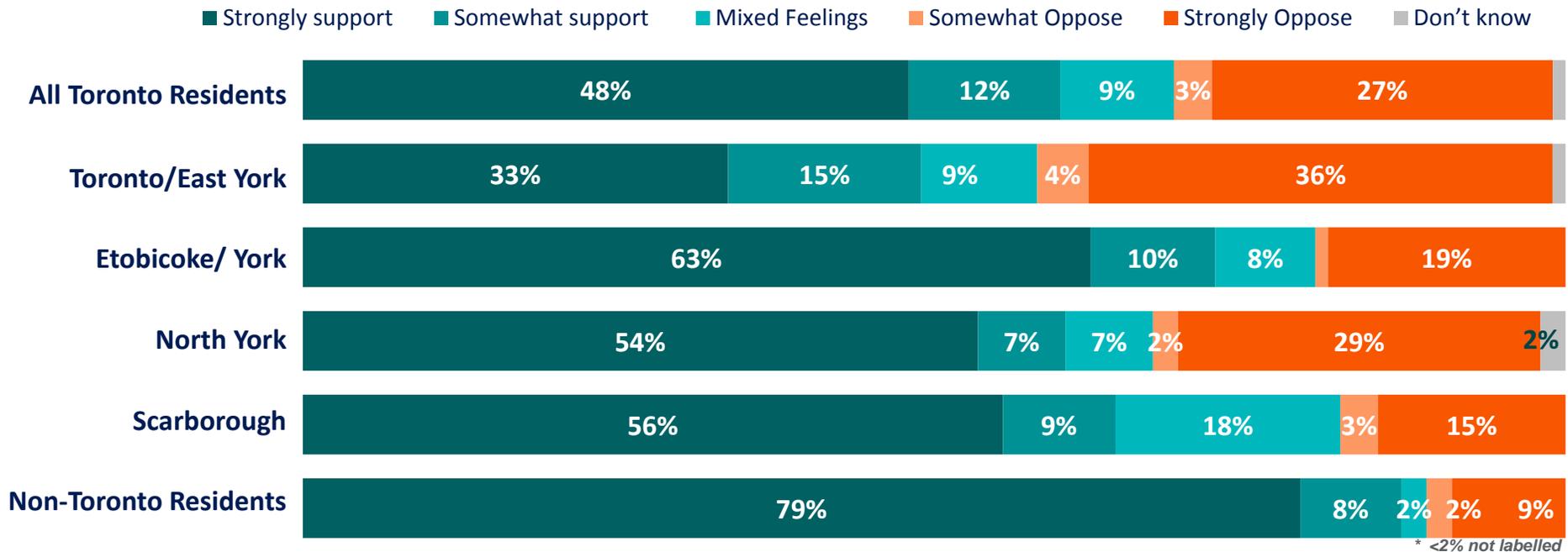
* <2% not labelled

Base: All respondents (n=465)

Support and Opposition Once Provided Information on the Expansion By Place of Residence

- Support levels remain consistent for all respondents before and after receiving additional details regarding expansion.
- Non-Toronto residents, 20% of respondents, continue to be the most strongly in favour of the Racetrack expansion, followed by residents of Etobicoke/York.

Q8. If the City of Toronto agrees to expanding gaming at Woodbine Racetrack, OLG and its operator could add up to 2000 slot machines and video-table casino games, to the existing 3000 and up to 400 live dealer tables. With this additional information, to what extent do you support or oppose expanding gaming at Woodbine?

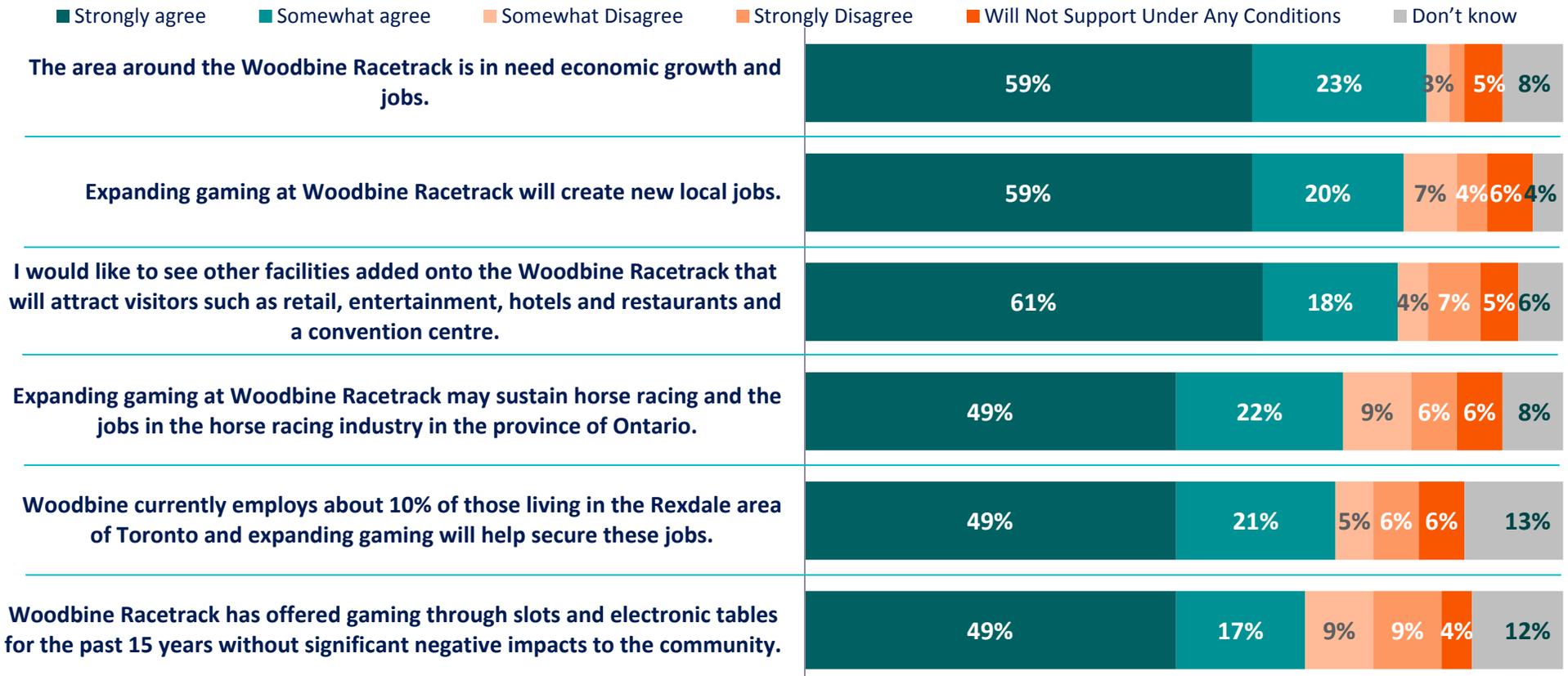


Base: All respondents (n=465)

Attitudes Toward Expanding Gaming at Woodbine

- A majority agree that the area around Woodbine Racetrack is in need of economic growth (82%), that expansion will create local jobs and that they would also like to see other facilities and businesses that will attract visitors (79% each); six in ten respondents strongly feel this way.

Q9. Do you agree or disagree with the following statements?



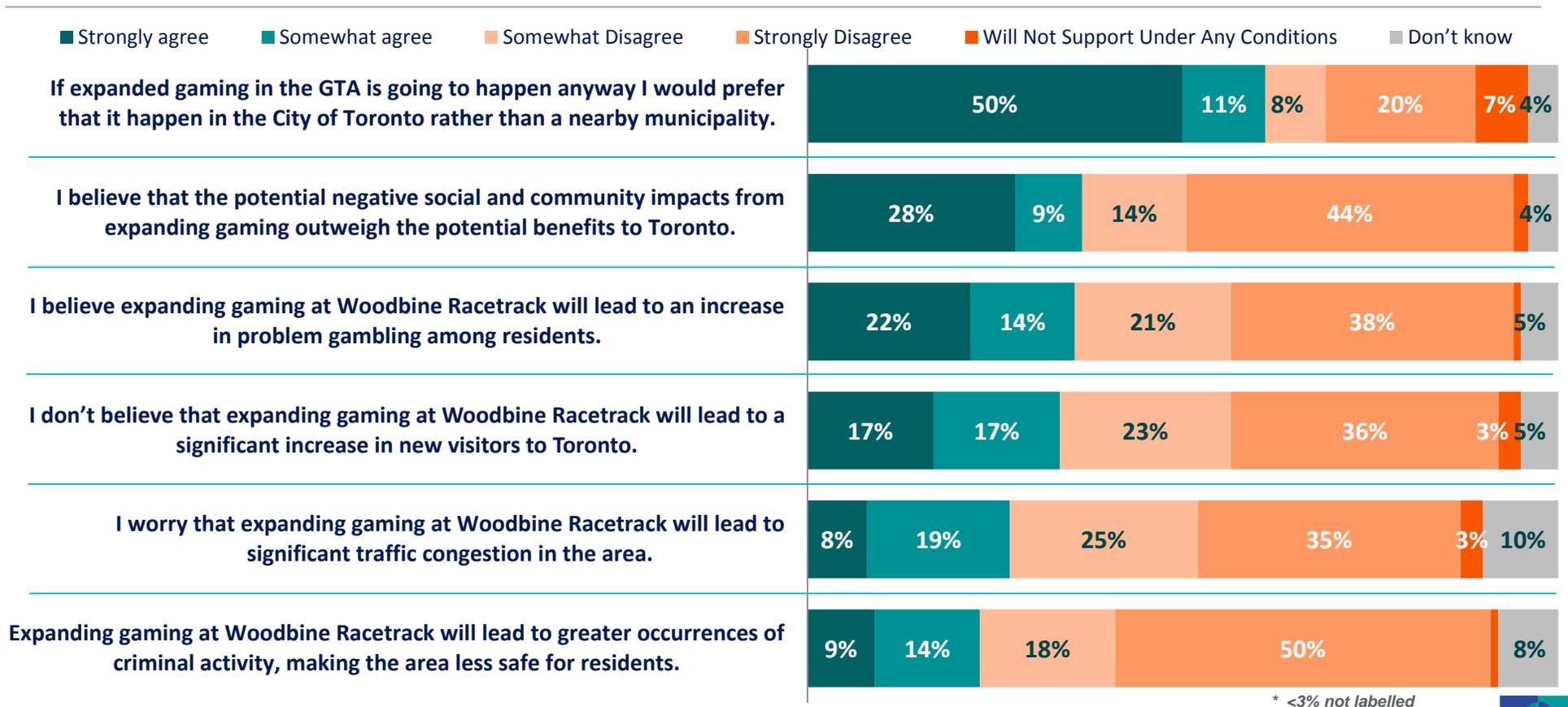
* <3% not labelled

Base: All respondents (n=465)

Attitudes Toward Expanding Gaming at Woodbine (continued)

- Only one-third of respondents believe expanding gaming at Woodbine will lead to an increase in problem gambling among residents.
- Only about a quarter of respondents worry that expanded gaming at Woodbine will lead to increase traffic congestion (27%) or to greater occurrences of criminal activity within the area (23%).

Q9. Do you agree or disagree with the following statements?

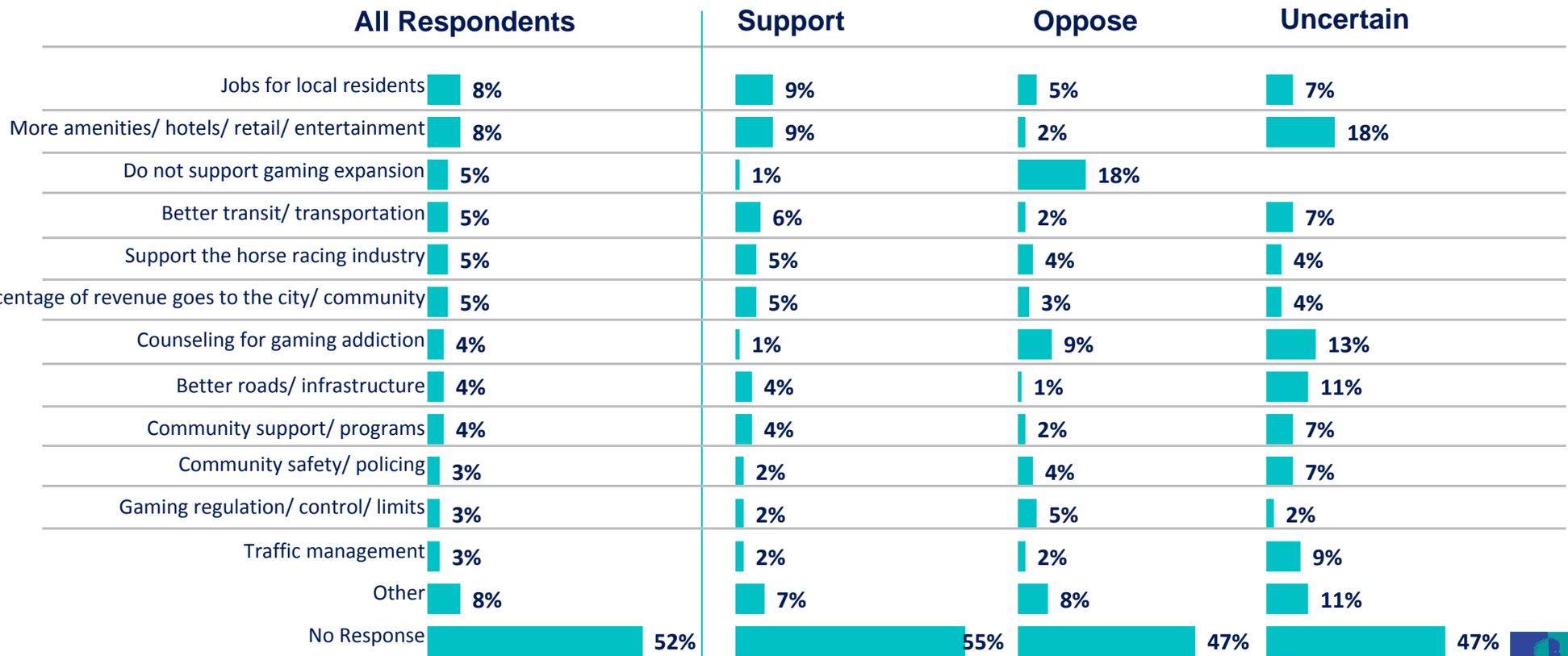


Base: All respondents (n=465)

Desired Conditions

- Half of respondents do not list any conditions that they would like the City to request. Of the remaining, the most frequent conditions are jobs for local residents and more amenities/hotels/retail and entertainment.
- Those who are uncertain about the Woodbine expansion would prefer that the City request more amenities, counselling for gaming addiction, and better roads/infrastructure as conditions for approval of expansion.

Q10. City Council has the opportunity to request conditions to the Province and the Ontario Lottery and Gaming Corporation (OLG) if it approves expanding gaming at Woodbine Racetrack, what conditions, if any, would you like City Council to request if it approves expanding gaming?

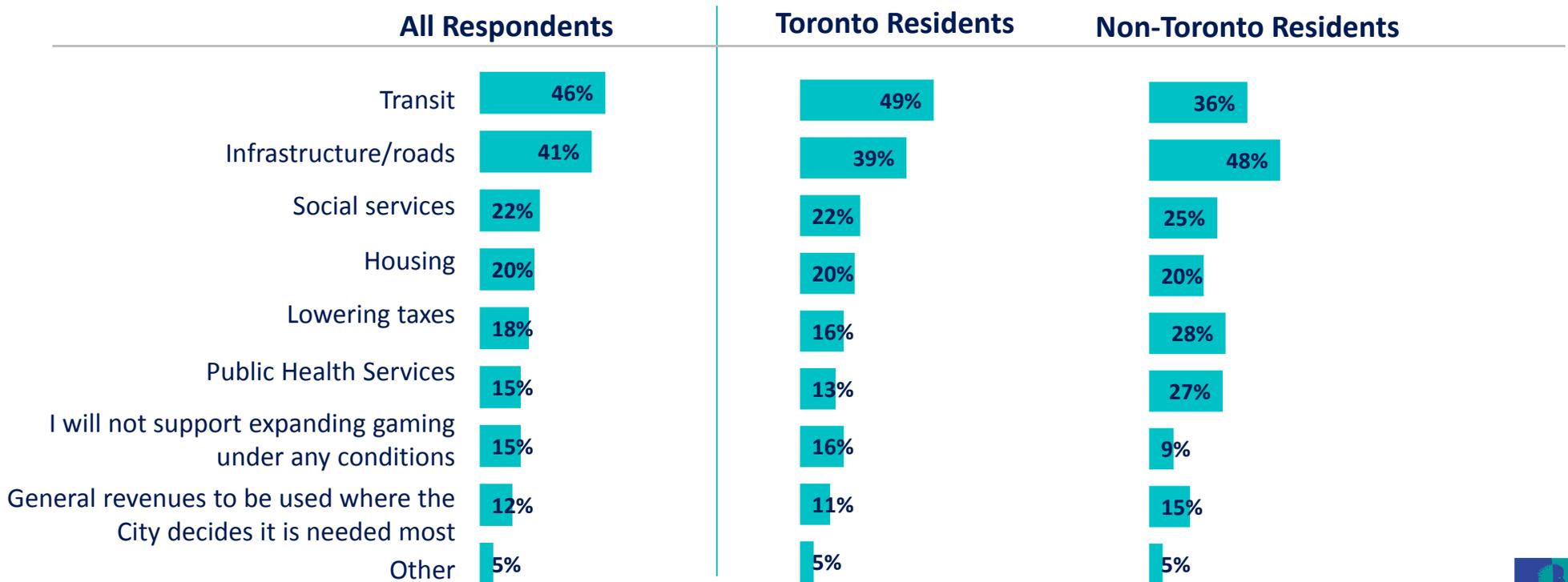


Base: All respondents (n=465)

Directed Revenue

- The largest share of respondents believes that if revenues are directed to a specific City service it should be transit and nearly as many say infrastructure/roads. Toronto residents are more likely to say the revenue should be put into transit, while Non-Toronto residents would like to see it directed to infrastructure. The 20% Non-Toronto resident respondents are also more likely to say revenue should go towards lowering taxes and public health services.

Currently, the City receives roughly \$15 million annually in gaming revenue from Woodbine Racetrack as a hosting fee. Expanding gaming has the potential to increase the hosting fee by \$10-20 million to a total of \$25-\$35 million annually. Q10b. If revenue generated from expanding gaming at Woodbine Racetrack were to be directed to a specific City Service rather than general revenues, where would you like to see the revenue go?

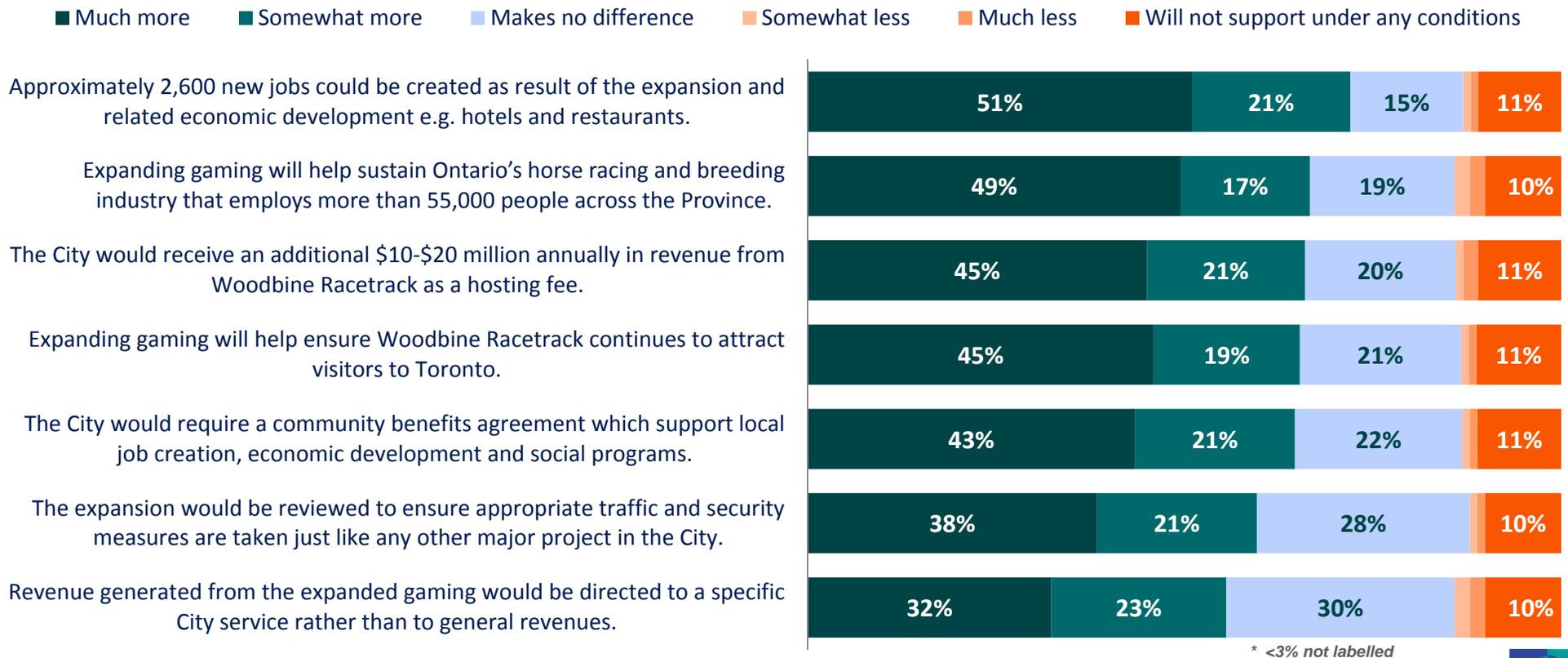


Base: All respondents (n=465)

Reaction to Specific Benefits / Conditions

- Half of respondents say they would be much more likely to support expansion if the creation of jobs could be guaranteed (51%).
- Nearly as many would be much more likely to support expansion if it could be guaranteed that the expansion would help sustain Ontario’s horse racing and breeding industry.

Q11. If the following could be guaranteed, would you be more or less likely to support expanding gaming at Woodbine Racetrack?

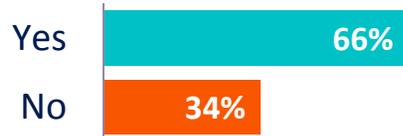


Base: All respondents (n=465)

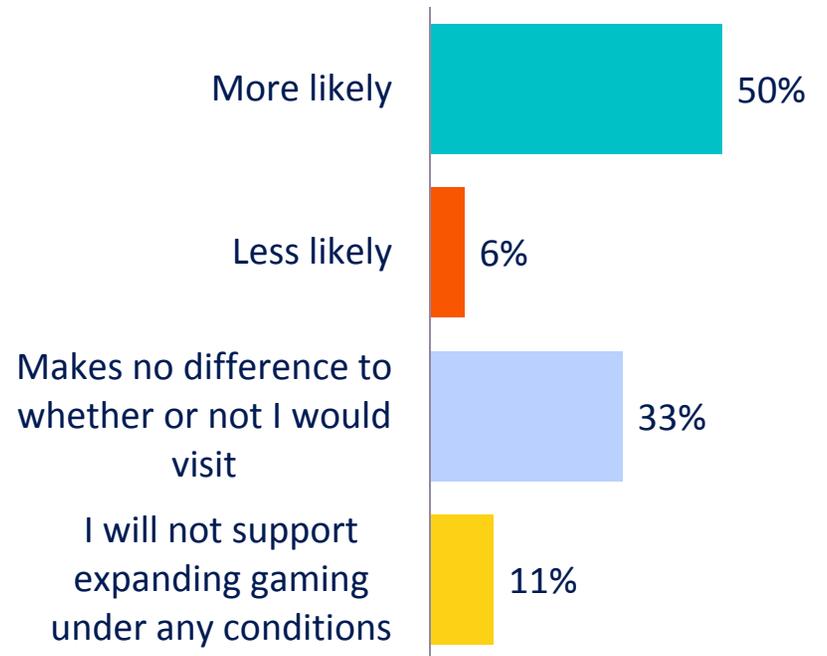
Impact on Likelihood to Visit Woodbine Racetrack

- Two-thirds of respondents say they have visited Woodbine Racetrack in the past five years. Of these, over one-quarter are regulars, visiting at least one to three times per month or more often. Half of respondents say they are more likely to visit Woodbine Racetrack if the expansion goes ahead, while 6% say less. One-third (33%) say it will make no difference.

Q12. Have you visited Woodbine Racetrack in the past 5 years?



Q14. If expanded gaming goes ahead at Woodbine Racetrack, would you be more or less likely to visit?

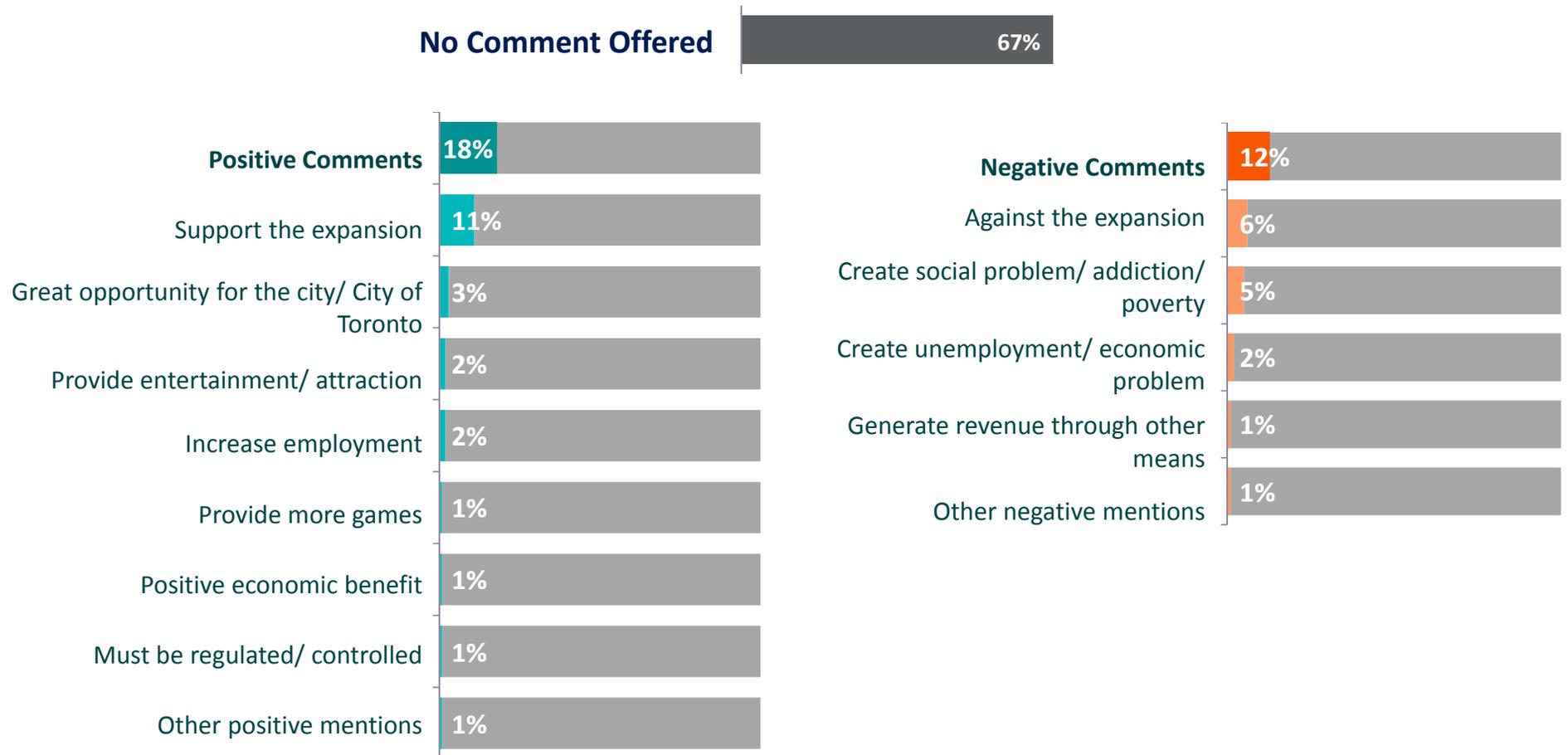


Q13. Approximately how often have you visited Woodbine Racetrack in the past 5 years?



Additional Comments

Q15. Do you have any general comments to provide?



Base: All respondents (n=465)

For more information contact

Sandra Guiry
sandra.guiry@ipsos.com

Kanan Kothari
Kanan.kothari@ipsos.com





Woodbine Racetrack Casino Community Consultation

June 18, 2015





Introduction

The City of Toronto is considering expanding gaming at Woodbine Racetrack.

Ipsos Reid was commissioned to gather evidence on public views towards a possible expansion via:

- a telephone survey of residents to provide statistically representative results for the city as a whole
- an online survey link, containing the same questionnaire used in the telephone survey, posted on the City
- a public meeting open to anyone
- This report outlines the approach used and public feedback collected via the public meeting held on May 11th, 2015 at the Etobicoke Olympium, 2nd Floor Lounge, 590 Rathburn Road, Toronto



Consultation Approach



Key roles & responsibilities



- Advised on and administered methods of collecting feedback from public at the meeting
- Researchers were at the meeting to facilitate collection of feedback
- Analysis and reporting of public feedback collected at the meeting

- Publicized details of dates and location of the public meeting via its website, the Etobicoke Guardian, Metro Newspaper, the Weather Channel, social media and online advertisements
- Provided venue for public meeting
- Provided detailed information on possible impact of the expansion through information boards & by having City staff subject matter experts at the meeting





Agenda for the public meeting

18:00 – 18:30 **Arrival**

18:30 – 18:45 **Welcome from City and Ipsos explanation about public meeting activities**

18:45 – 19:30 **Open house information and feedback activities**

19:30 – 20:15 **Presentation from City and open microphone. Questions and comments via open microphone fielded and answered by City subject matter experts**

20:15 – 20:30 **Break**

20:30 – 21:30 **Additional questions and comments via open microphone and answers fielded by City subject matter experts**

21:30 **Closing remarks**

Presentation of information at the Public Meeting

- **Information boards** were set up with detailed information on the possible considerations of the expansion across various areas (transportation, public health, economic development, etc.)
 - ⇒ Participants were given opportunity to review these materials on arrival and as part of the time allocated to 'open house activities' and the break time
 - ⇒ **Subject Matter Experts** from the City were available to provide information on specific areas (transportation, public health, economic development, etc.)
 - ⇒ Hard copies of the information was provided to those who requested it, or who were taking notes or photos of the boards

- **Presentation** was given by the City Manager's Office on the possible project overall
 - ⇒ Deputy Mayor Vincent Crisanti made opening remarks prior to the presentation

- **Q&A** opportunities with City Manager's Office and Subject Matter Experts from the City
 - ⇒ City subject matter experts welcomed participants and were stationed by the information boards to answer any questions. City staff responded to questions raised during the open microphone sessions



How public feedback was collected

80 community members attended the meeting.



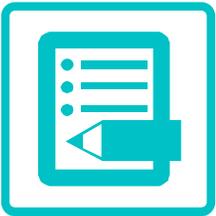
▪ **Open microphone**

- ⇒ Two timeslots were allocated to this to give sufficient time for all who wanted to speak
- ⇒ Comments were captured by an Ipsos note-taker
- ⇒ 20 community members spoke at the open microphone



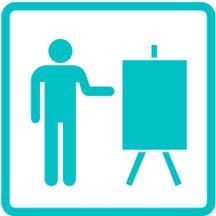
▪ **Providing verbal feedback to an Ipsos researcher**

- ⇒ During the open house, Ipsos researchers spoke with attendees one-on-one to gather their immediate reactions to the information boards and to allow those less comfortable with the open microphone opportunity to voice their issues. Anonymized feedback was immediately uploaded to the Ipsos Ideation Exchange platform and projected in the room via a live feed
- ⇒ 19 community members provided input through a researcher



▪ **Self-completion feedback forms**

- ⇒ Public were offered feedback forms to complete if they wished
- ⇒ 51 community members provided input through a feedback form



▪ **Comment boards on benefits and drawbacks of the possible expansion**

- ⇒ This was mainly done during the 'open house activities' and break times
- ⇒ Blank display boards and markers were provided and community members were encouraged to post, write or draw their thoughts and input

One community member also gave feedback by calling the City Manager's Office. That feedback is also included in this report.



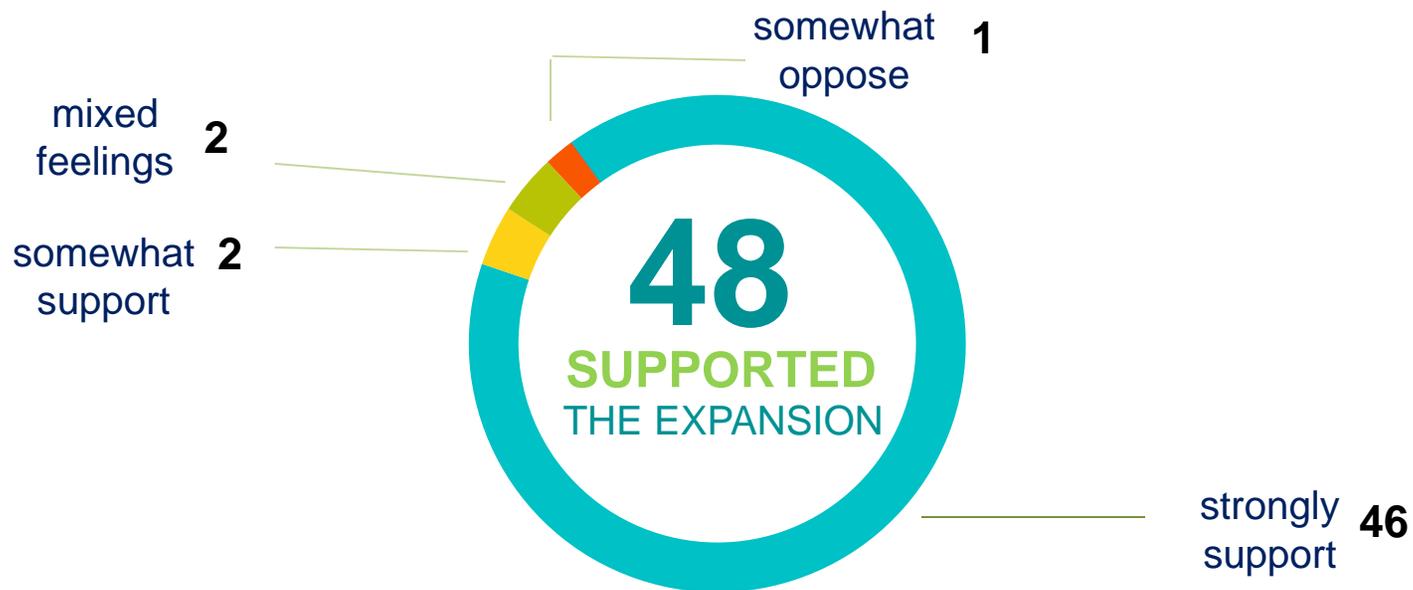
Note on the interpretation of feedback

- The main objective of the public meeting was to provide the public with information on the possible expansion and an opportunity to provide their feedback.
- The meeting was open to anyone who wished to attend and there were no requirements for registering in advance or on arrival (with the exception of media representatives). Attendees were also free to enter or leave the meeting throughout the 3 hour session.
- The feedback that follows includes findings gathered from all avenues at the public meeting including feedback forms, open microphone, comment boards, and verbal feedback given to an Ipsos researcher.
- The feedback that follows represents the views of those with an interest in the topic or the consultation and who attended the public meeting.
- For a statistically representative analysis of the attitudes of the city's population, please see accompanying document *Woodbine Racetrack Casino: City-Wide Public Opinion Poll Report*.

Public Feedback

Strong support for the expansion at the public meeting

Of the 51 community members who completed feedback forms, 48 either somewhat or strongly supported the possible expansion. Only 1 stated mixed feelings, and 1 somewhat opposed. No one who completed the feedback form expressed strong opposition to the expansion.

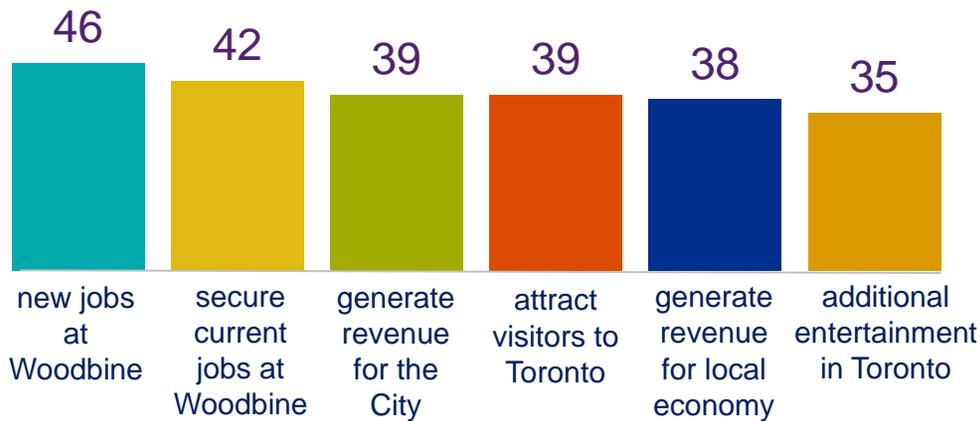


Most saw considerable benefits related to the expansion

Creating new jobs and securing existing jobs were seen as the main benefits of an expansion for those who completed the feedback forms (see chart below), as well as for those who contributed through the open microphone, the comment boards and through an Ipsos researcher. Generating revenue for the City/local economy, attracting visitors, and providing additional entertainment in Toronto were also seen as compelling benefits.

The primary drawbacks expressed were related to increased traffic congestion, revenue coming from a source some don't agree with, concerns about gambling addiction, other health issues, and public safety in the area. Overall, those attending the meeting expressed far greater benefits than drawbacks.

BENEFITS, n=51



DRAWBACKS, n=51



*29 of those who filled the feedback forms saw no drawbacks with the expansion. Q. What are the main benefits of a possible expansion? Q. What are the main drawbacks of a possible expansion?

Support remained unchanged in response to more information on level of gaming expansion

The opinions of those who responded via a feedback form remained largely unchanged once they were provided with additional information about the expansion. Support remained strong, with a few having mixed feelings or somewhat opposing, but none strongly opposing.

Currently, Woodbine Racetrack offers approximately 3000 slot machines and video-table casino games (not staffed by a live person) in addition to horse racing/betting. If the City of Toronto agrees to expanding gaming at Woodbine Racetrack, **OLG and its operator could add up to 2000 slot machines and video-table casino games, to the existing 3000 and up to 400 live dealer tables.**

Knowing this, to what extent do you support or oppose the possibility of expanding gaming at Woodbine Racetrack?

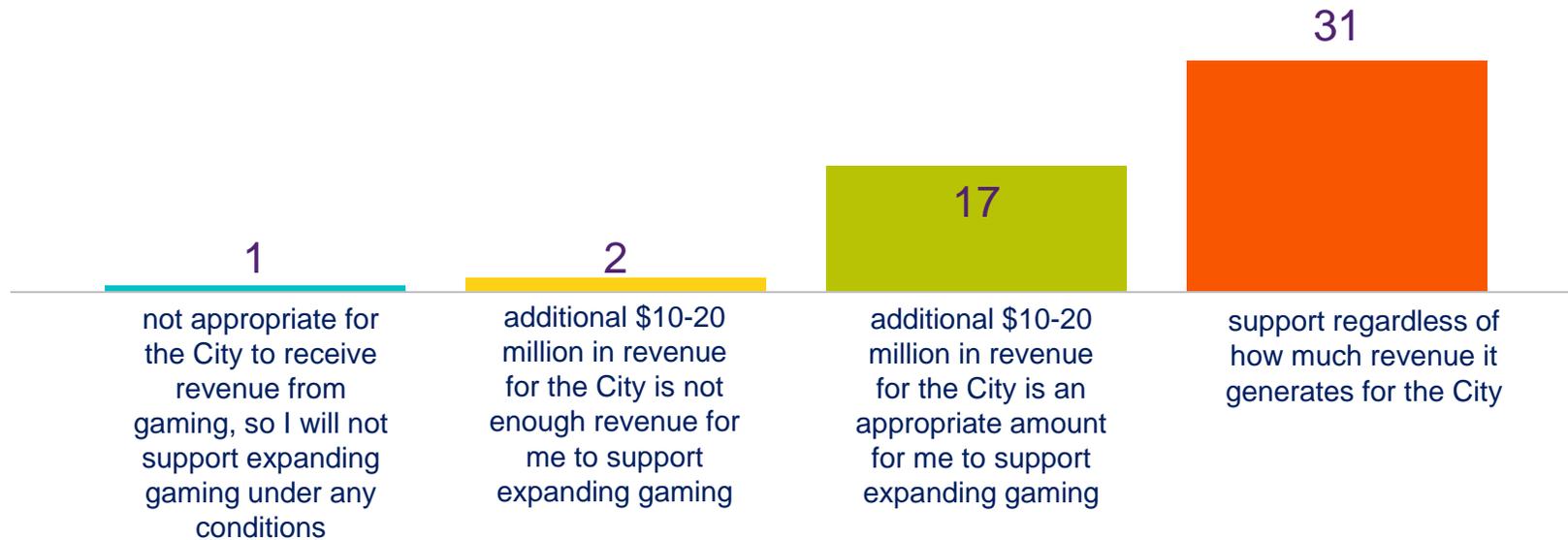


Many supported expansion regardless of revenue generated for the City

Most who completed the feedback form supported the expansion regardless of the revenue it generates for the City, while a large number felt that \$10-20 million in additional revenue was enough to support expansion.

Currently, the City receives roughly \$15 million annually in gaming revenue from Woodbine Racetrack as a hosting fee. Expanding gaming has the potential to increase the hosting fee by \$10-20 million, to a total of \$25-35 million annually.

Knowing this, which of the following is the closest to your view?



Benefits: creation of new, fulltime, unionised jobs and positive impact on local economy were the main positive comments raised in open mic, one-on-one interviews & comment boards

“It will make this area a destination”

“Good jobs for the local community”

“Only full time jobs are worthwhile. Part time does not equal full time because part time gets no benefits, pension etc. Woodbine should commit to a specific number of full time jobs”

“I see endless possibilities for changing people’s lives for the better”

“However, there are a number of youth trying to develop employment skills , including seasonal Humber students”

“Protection of horse racing. Economic benefits to the community”

“Possibility of more good union jobs”

“Community benefits – local hiring and training for good jobs”

“Local community hiring”

“Better public transit”

“Unique opportunity because of racing seasonal layoff to fill the gap with new jobs”

“Jobs. More buses and other transit”

“It will brings economic benefits to a forgotten part of Toronto”



Drawbacks: mentioned by participants...

“ Suicide, bankruptcy, criminal support offence, primary victims are elderly and poor ”

“ We are not open minded enough to make it happen and be an important community players ”

“ This place created a very serious addiction. More people will fall in the same habits. It's very dangerous ”

“ We need better public transit to support this ”

“ We are for jobs, but at the end of the day gambling is gambling – the winners are not the people...Families have the problem when their loved ones have gambled everything away and they don't even know – it's a big family secret ”

Questions: from participants...

“ Will there be other expansions? Local hotels and the hospitality industry around Woodbine? ”

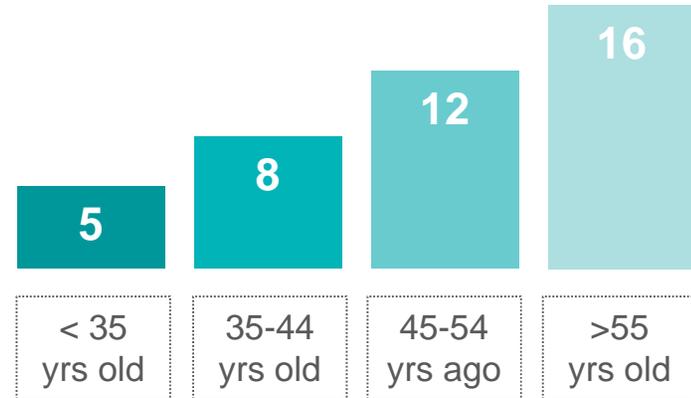
“ Will jobs be full-time with benefits? They have to be jobs that can support a family ”

“ What are the timelines for this all to happen? ”

Profile of public meeting attendees who completed the feedback form

17 FEMALE

23 MALE



46 provided feedback on the form as an individual

4 provided feedback on the form on behalf of a group or organization



For more information

Kanan Kothari
kanan.kothari@ipsos.com

Sandra Guiry
sandra.guiry@ipsos.com