

New York State October 2018 Gaming Survey Results



Lay of the Land

Methodology

Voters

Global Strategy Group conducted a survey of **1,346 registered voters in New York State between October 29 and November 11, 2018.**

This includes 606 base interviews statewide and oversamples that allowed us to reach 301 interviews in Queens, 300 interviews in Yonkers, and 306 interviews in Long Island.

GSG conducted a previous 802-interview statewide survey in February 2018 about casino expansion, among a different audience (likely Nov. 2018 voters) and without any regional oversamples.

Margin of error

The margin of error of the statewide sample at the 95% confidence level is +/- 3.9%.

The margin of error on sub-samples is greater.



Methodology

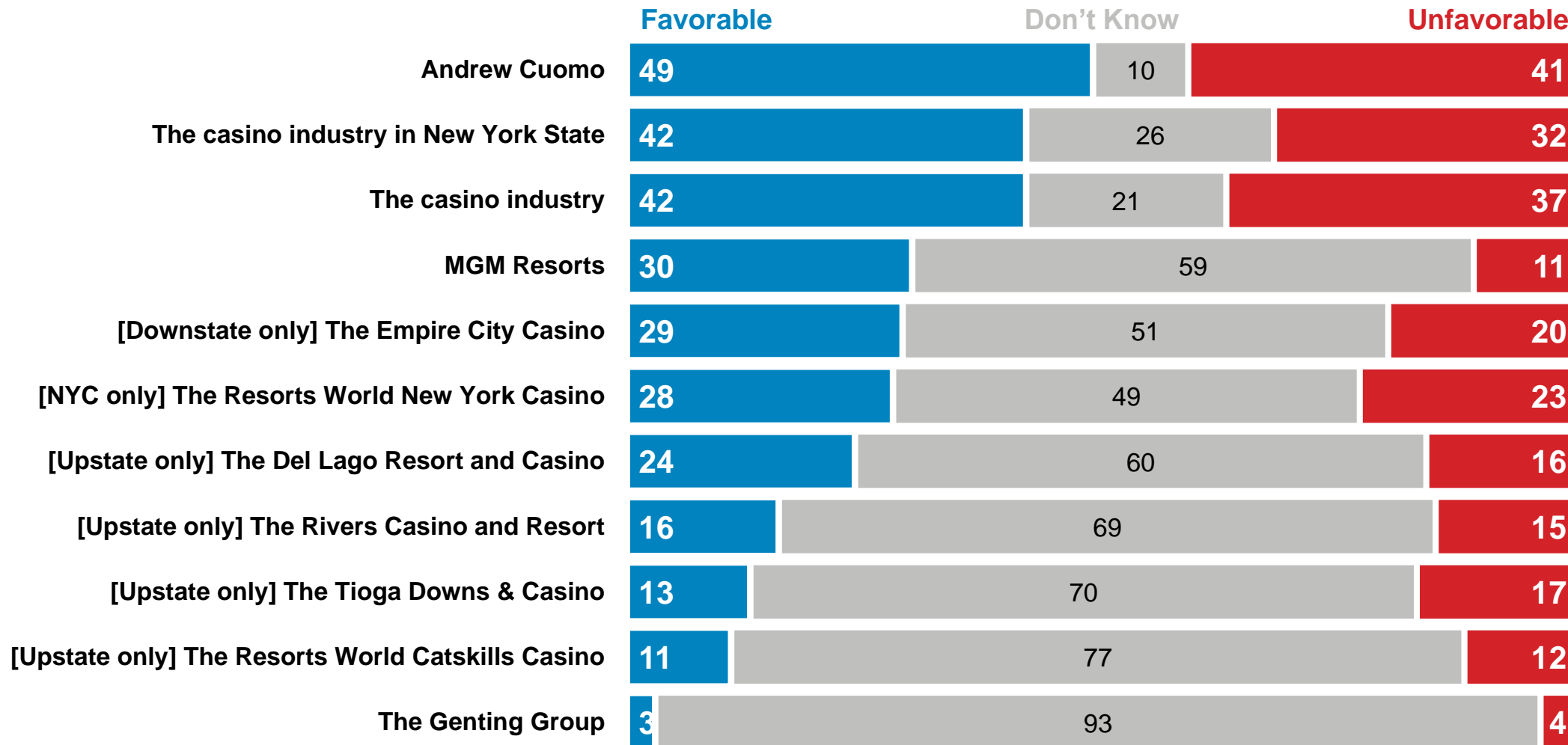
Queens regions definitions

- Northwest Queens consists of assembly districts: 28, 30, 34, 35, 36, 37, 39;
- Northeast Queens consists of assembly districts: 25, 26, 27, 40;
- Southwest Queens consists of assembly districts: 23, 31, 32, 38;
- Southeast Queens consists of assembly districts: 24, 29, 33;



The gaming industry in New York State is not fully defined, as voters have mixed feelings about the industry writ large and aren't highly familiar with MGM, Genting or other existing casinos

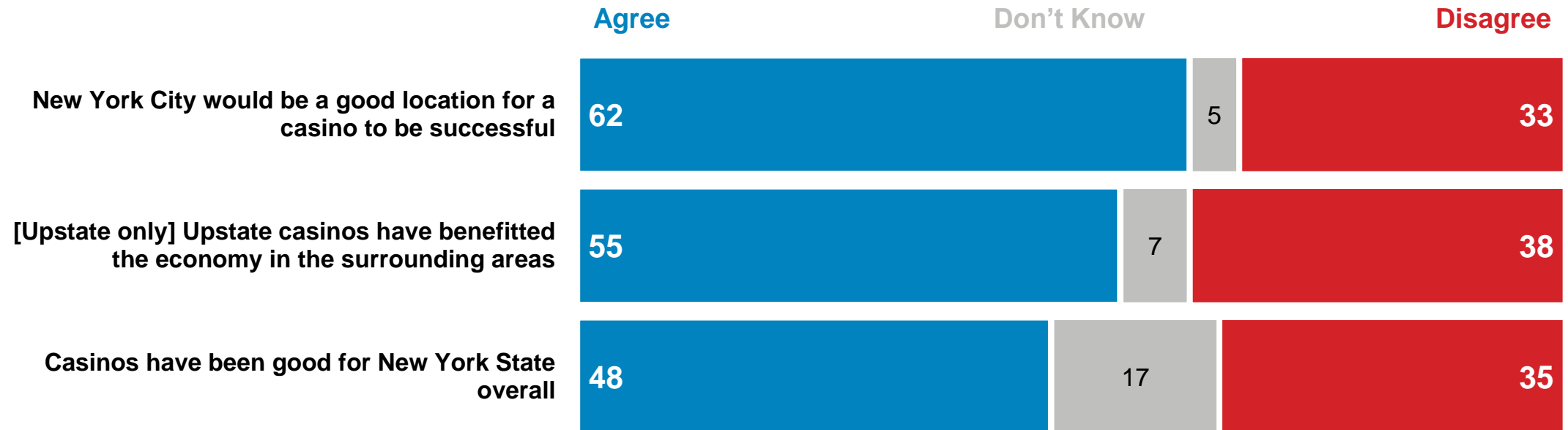
Personal popularity of public figures and groups



RWNY is especially well-regarded in Southwest Queens, the community closest to the casino.

Voters aren't convinced that casinos have been good for the state so far, but believe NYC would be a good location for one to be successful

Do you agree or disagree with the following statement?



Voters throughout the state prefer the idea of converting existing NYC area casinos over building new ones

Do you agree or disagree with the following statement?

If New York State is going to allow full-scale casinos in the New York City area, I'd prefer that they convert existing casinos into full-scale casinos rather than building brand new ones.

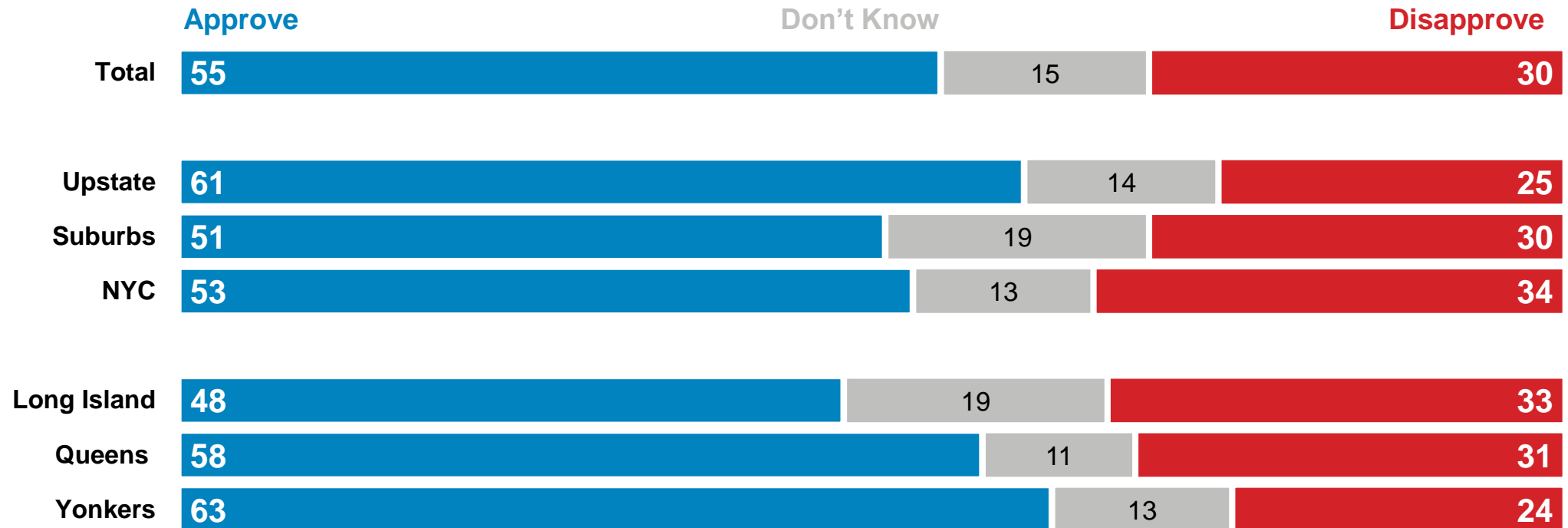


The stronger support we see in Yonkers for converting existing casinos stems partly from the greater positive feeling for Empire City in Yonkers (+38 fav) than for RWNY in Queens (only +17 fav).



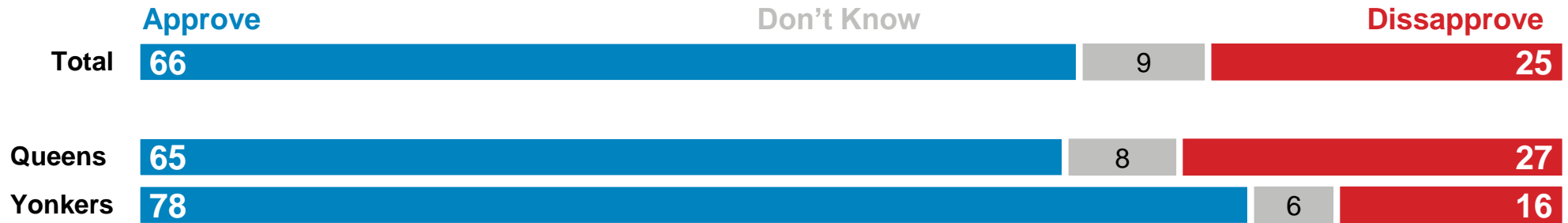
Voters are inclined to maintain existing laws requiring casinos near racetracks to help subsidize the horse racing industry

Approval for NYS law requiring horse racing industry subsidy

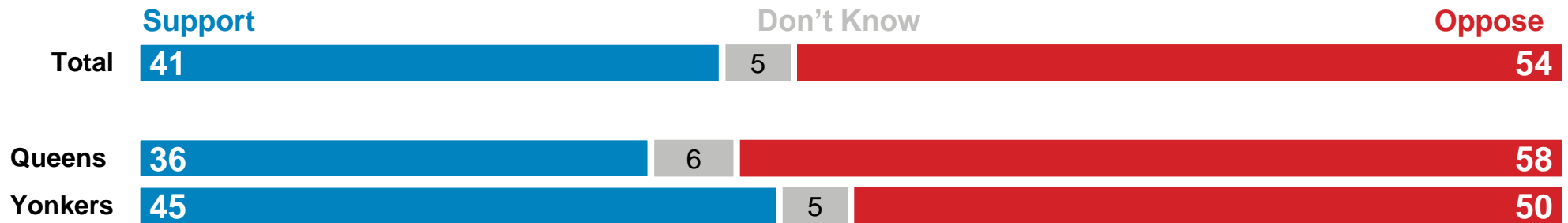


New Yorkers approve of the state's current sports betting laws, and are generally opposed to expanding sports betting in the state

Approval for NYS law allowing sports betting inside casinos



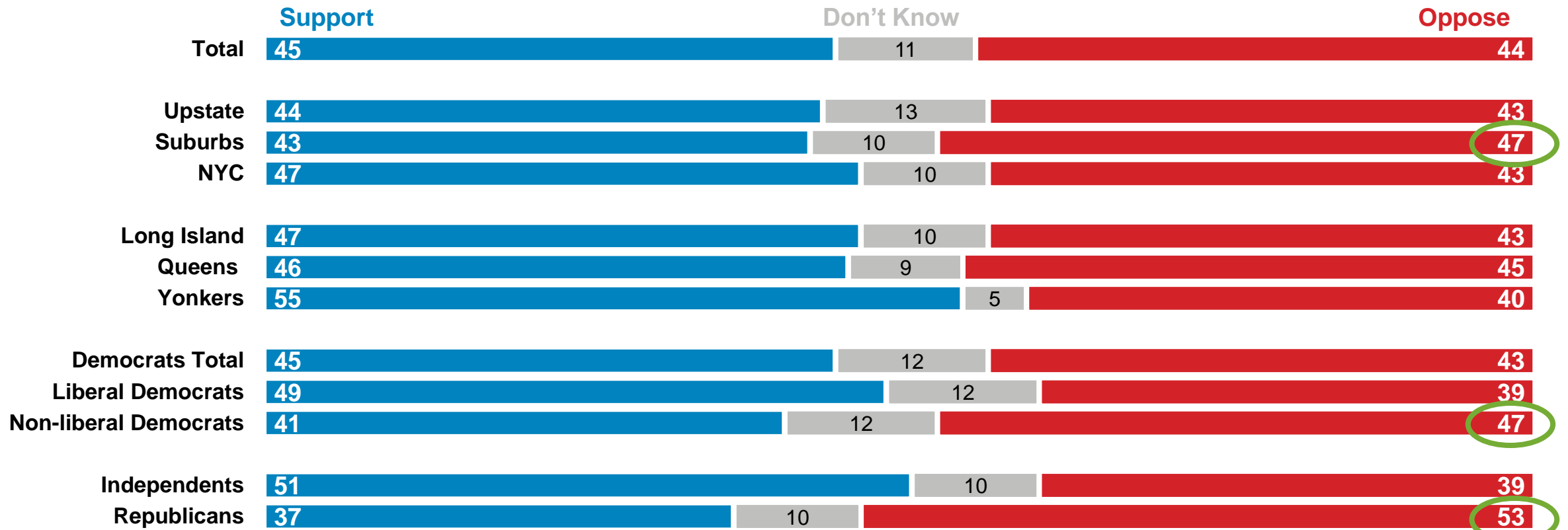
Support for allowing online sports betting in NYS



Casino Gaming Proposals

Registered voters are split on the idea of allowing a new casino in the NYC area; greater opposition in suburbs and among conservative elements of electorate

Support for new casino in the New York City area that would be located either in one of the five boroughs, Long Island or Westchester County

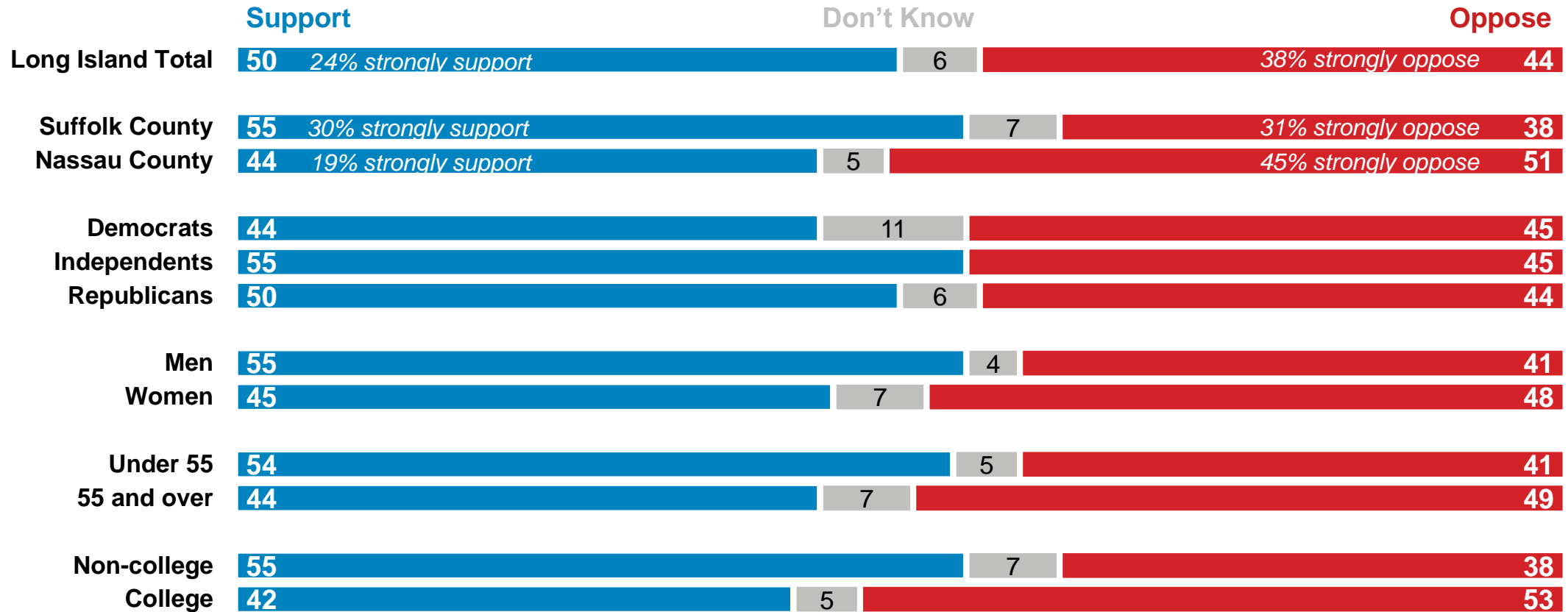


Likely voters have remained consistent in their opposition to a new casino, opposed by 7 points in February (42% support / 49% oppose) and 6 points in October (41% support / 47% oppose).



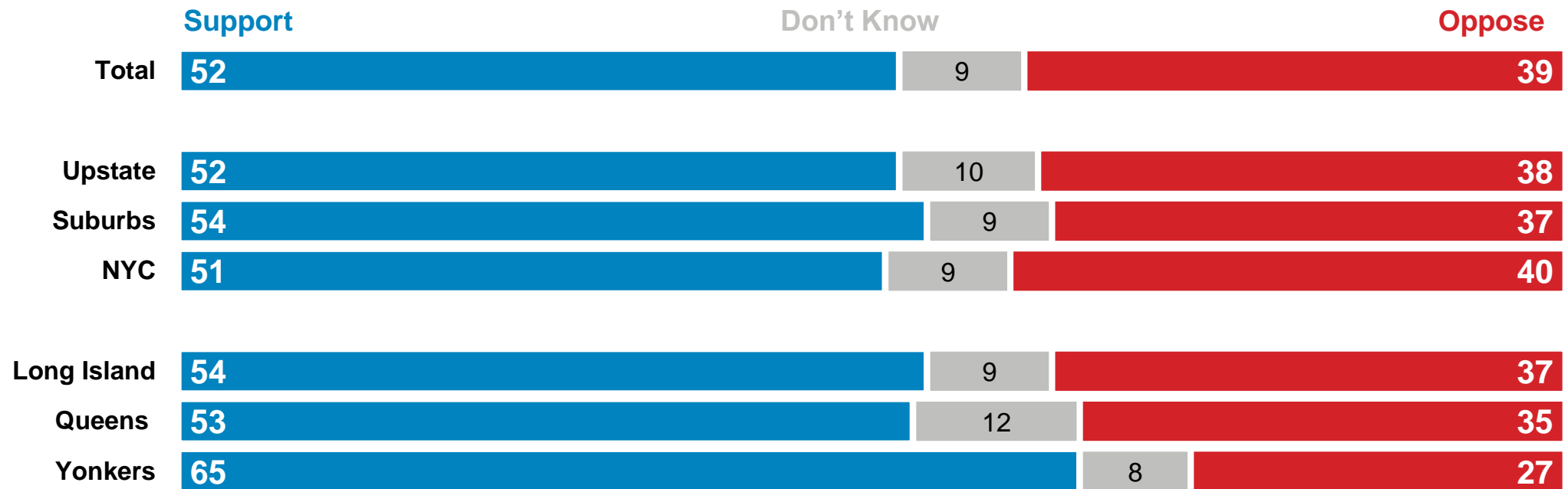
Long Island voters tilt narrowly in favor of allowing a new casino in their area, but intensity is on the side of the idea's opponents

[Long Island only] Support for a new casino on Long Island, in either Nassau County or Suffolk County



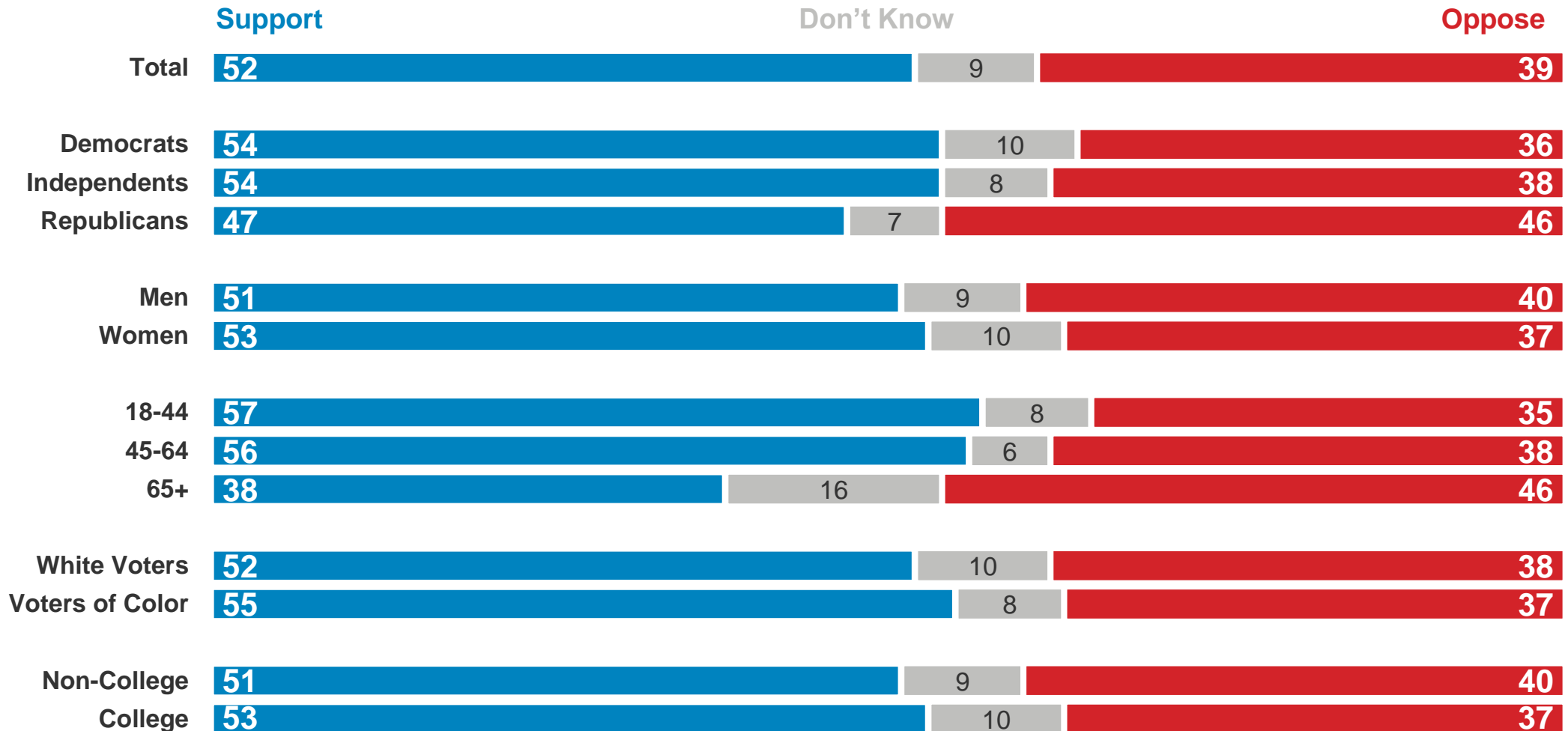
A slim majority support converting Empire City and RWNY into full-scale casinos, and the proposal plays well in both Queens and Yonkers

Support for converting Empire City and Resorts World New York to full-scale casinos



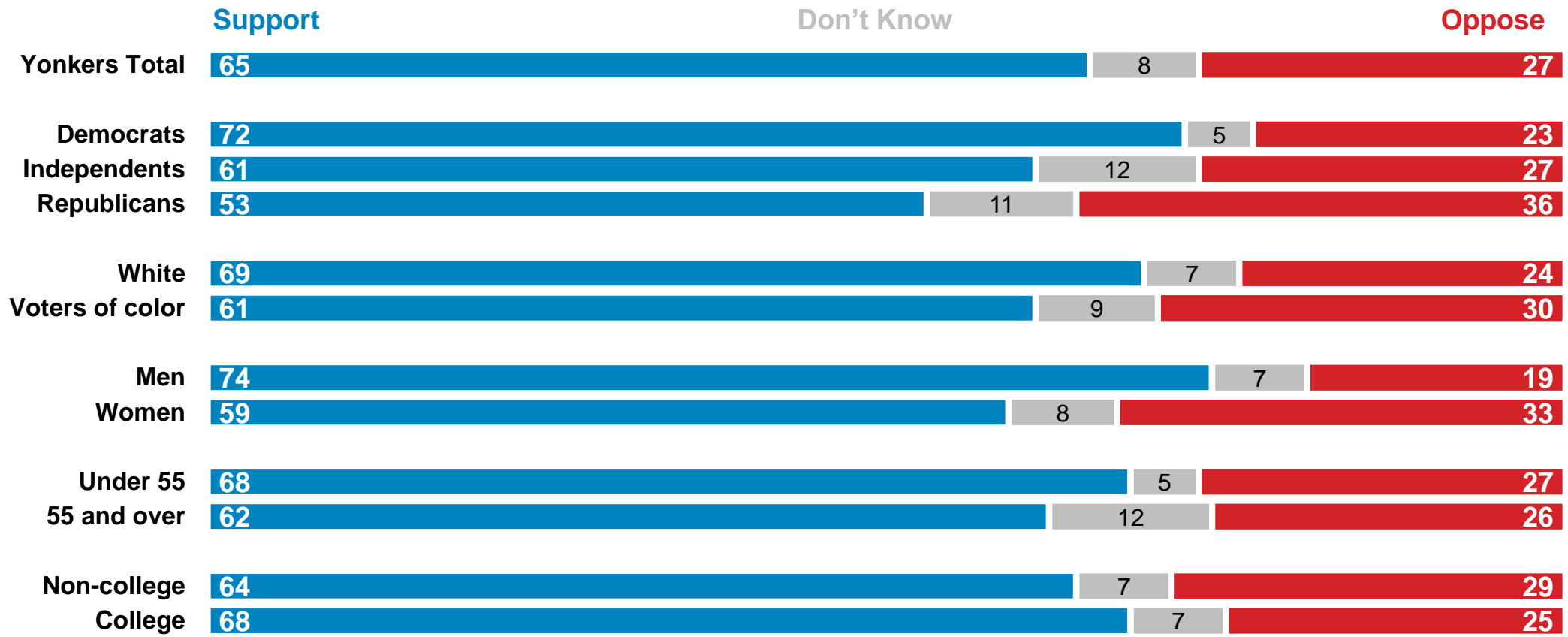
Support for conversion proposal is generally consistent across demographic lines, with no constituency clearly opposed to the idea

Support for converting Empire City and Resorts World New York to full-scale casinos



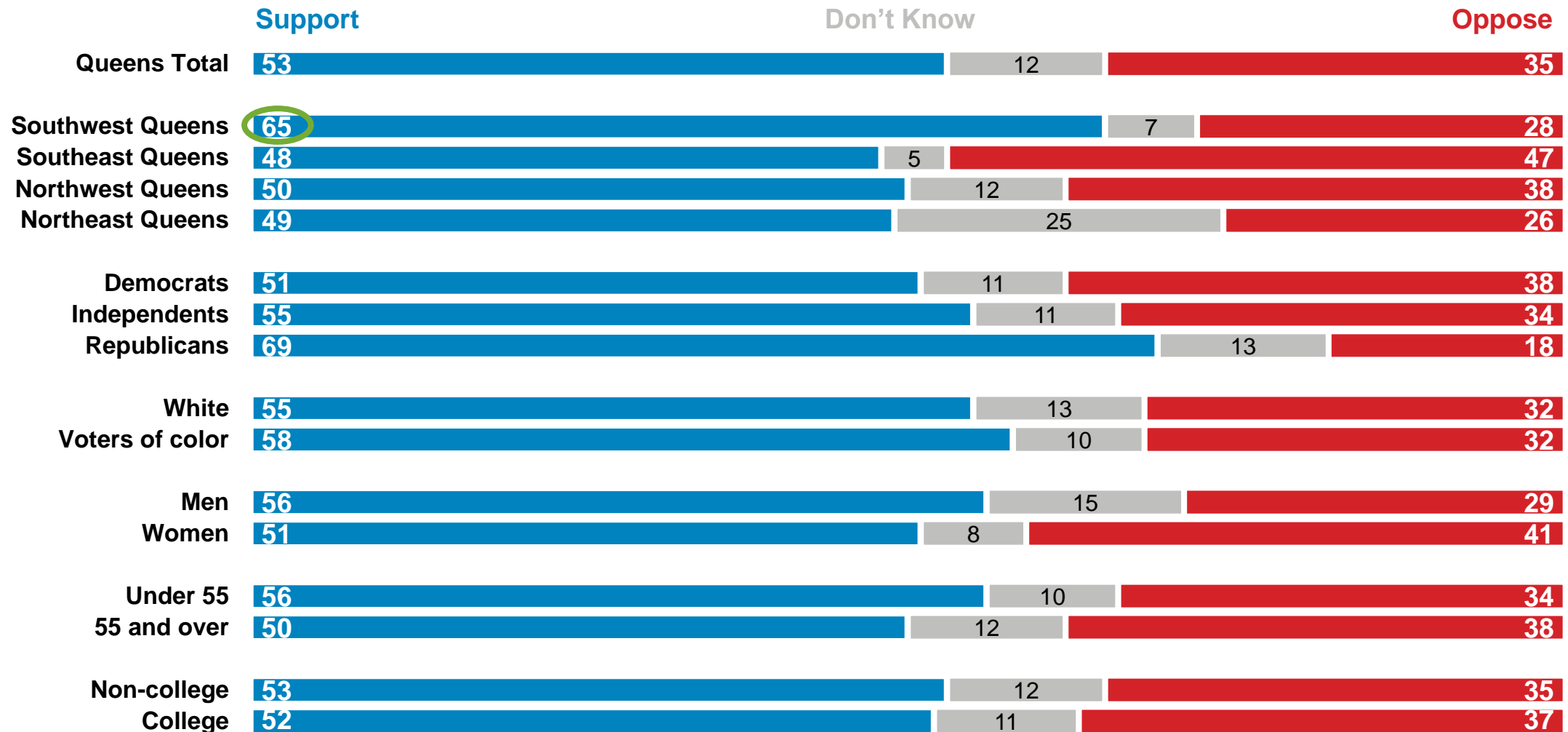
There is strong support across the board for the conversion proposal in Yonkers

YONKERS ONLY - Support for converting Empire City and Resorts World New York to full-scale casinos



Softer support for the conversion proposal in Queens is driven by Democrats, women and older voters

QUEENS ONLY - Support for converting Empire City and Resorts World New York to full-scale casinos



Targets & Messaging

Positive messaging behind casino conversion is effective at increasing support across the state

Change in support for proposal to convert Empire City and RWNY

	Net Support		
	Initial	Post-messages	Change
Total	+13	+37	+24
Upstate	+14	+35	+21
Suburbs	+17	+32	+15
NYC	+11	+41	+30
Long Island	+17	+35	+18
Queens	+18	+43	+25
Yonkers	+38	+58	+20



Older voters, voters of color, and residents of the NYC suburbs are most persuadable on the conversion proposal

Targets - Statewide



Base

Always supports conversion plan

Liberal Democrats (52% are base)

Democratic men (52%)

Upstate Democrats (52%)

Non-conservative independents (53%)

Younger voters:

- Under 55 (51%)
- Women under 55 (56%)
- White under 55 (54%)
- Independent women (55%)

Upstate West (52%)

Upstate City (62%)

Suffolk County (52%)

Swing

Sometimes supports conversion plan or always undecided

Democratic women (37% are swing)

Downstate Democrats (37%)

Independent men (38%)

Black/Hispanic (38%)

Black (40%)

Older voters:

- Age 65+ (42%)
- Women 55+ (36%)

Hudson Valley (44%)

Manhattan (41%)

Oppo

Always opposes conversion plan

Republicans (32% are oppo)

Upstate GOP (33%)

Downstate GOP (31%)

Conservative independents (34%)

Our mobilization targets in Queens skew blue collar and liberal; persuasion targets tend to be more conservative than swing voters statewide

Persuasion and Base Targets – Queens

Queens – 31% are swing voters

Better educated & less liberal men:

- College men (41%)
- Democratic men (38%)
- Non-liberal Democrats (37%)

Queens – 49% are base voters

Blue collar men, liberals, and Hispanic voters:

- Non-college men (57%)
- White men (56%)
- Middle aged voters 45-64 (60%)
- Hispanic voters (59%)
- Liberals (58%)



Blue collar men and liberals are also key mobilization targets in Yonkers, while persuasion targets are older and more conservative

Persuasion and Base Targets – Yonkers

Yonkers – 25% are swing voters

Older & more conservative:

- 55 and over (30%)
- White 55 and over (31%)
- Women over 55 (35%)
- Republicans (38%)
- Republican men (40%)
- Conservative independents (31%)

Yonkers – 60% are base voters

Blue collar men, liberals, and Black voters:

- Men (68%)
- Non-college men (70%)
- White non-college (69%)
- Liberals (69%)
- White men (65%)
- Black voters (64%)



Our messages on job creation and license fees are broadly resonant, and the age minimum argument is also effective with persuadable voters

More effective positive messages for conversion proposal

Overall	Total	Swing			
		Queens	Yonkers	Long Island	
		<i>% very convincing</i>			
45	41	36	48	54	[JOBS] This plan will create thousands of good-paying jobs for New Yorkers, including immediate construction jobs and thousands of additional permanent jobs at the casinos and surrounding businesses that the casinos will support. These new casino jobs will pay some of the highest wages for casino jobs in the country and include health benefits for workers.
43	45	53	52	53	[LICENSE FEES] This plan will bring an estimated \$1 billion in new revenue to the state immediately as an upfront payment for the two casino licenses, even before the casinos are converted. And because casino license fees are required by New York State law to go directly toward public education funding, these funds could be used immediately to improve K-12 education throughout the state and help struggling school districts.
43	38	42	39	54	[KEEPING MONEY IN STATE] This plan will ensure that more of New Yorkers' money is kept in New York State. The state is losing out on millions of dollars every year from New Yorkers going to neighboring states like New Jersey and Connecticut to visit their full-scale casinos, spending money to boost other states' economies and fund their schools instead of New York's. With full-scale casinos in the New York City area, more of this money will be kept in state where it belongs.
40	43	43	40	53	[LABOR] This plan is supported by local hotel and teachers' unions because it will create thousands of good-paying jobs in New York State, including good union jobs with benefits, and will create additional revenue for schools and education
38	43	37	56	41	[AGE MINIMUM] This proposal will raise the age minimum for casino gaming from 18-21 at both these locations. Both casinos currently allow casino gaming for people who are 18 or older, but they will have to raise their minimum age to 21 in order to obtain full licenses under the terms of this proposal.

Economic development beyond the immediate jobs created and preventing a new casino are less persuasive; MGM & Genting's low profiles show there is no clear benefit to include them in messages

Less effective positive messages for conversion proposal

Overall	Total	Swing			
		Queens	Yonkers	Long Island	
		<i>% very convincing</i>			
38	36	31	39	43	[BUDGET DEFICIT] New York State faces a structural budget deficit of up to \$4 billion this year. Converting these existing casinos into full-scale casinos will help provide revenues that the state needs to address its budget challenges without raising taxes or cutting important programs.
37	32	35	36	32	[SPORTS BETTING] Since New Jersey legalized sports betting last year, millions of dollars a month are being placed on sports bets at locations like the Meadowlands, just six miles from New York City. This plan would help stop this massive new outflow of New Yorkers' money to New Jersey, by providing locations where New Yorkers can place these bets legally without crossing over the border.
36	33	37	37	35	[TOURISM] Converting these casinos into full-scale casinos would allow New York State to gain even more benefits from tourism, which already brings 60 million visitors to New York City each year and injects tens of billions of dollars into the state economy.
31	24	28	23	26	[NO NEW CASINOS] By converting existing casinos into full-scale casinos, this plan will create all the economic benefits of having full-scale casinos in the New York City area without the congestion and overdevelopment that might be caused by building a brand new casino. And because of the limited number of casino licenses available from the referendum that was passed in 2013, this plan will reduce the likelihood that any new casino ever gets built in New York City.
27	23	23	30	30	[ECONOMIC DEVELOPMENT] These casinos already support thousands of local jobs and have generated over a billion dollars in tax revenues, and converting them to full-scale casinos would increase their economic impact and generate major new long-term investments in the local economies of Yonkers and Queens. And the conversion of these existing casinos into full-scale casinos would be managed by MGM and Genting, two of the world's premier entertainment companies, who have created multi-billion dollar entertainment destinations in cities across the world.

Conclusion and Recommendations

Conclusions & Recommendations

Voters believe that New York City is a good location for a casino to succeed, but have mixed feelings about whether or not having a new casino there is a good idea. However, they are clearly amenable to converting the existing casino sites into full-scale casinos.

- Casinos are divisive (as we often see) and voters statewide are not convinced that casinos have been good for the state so far. However, most still believe that the NYC region is a good location for a casino and even more prefer converting an existing NYC area casino.

Importantly, we see strong support for a conversion proposal in Queens and Yonkers.

- A slim statewide majority support converting Empire City and RWNY. However, a larger majority of voters in Queens and Yonkers – the communities directly impacted by the proposal - are in favor of the idea.
- No constituency is overly opposed to the proposal and only the most conservative elements of the electorate have a greater tendency to oppose the idea.



Conclusions & Recommendations

Job creation and new state revenue for public education are the best messages for a conversion plan.

- This simple, clear economic rationale works well across key audiences – including voters in Queens and Yonkers and persuadable voters statewide who can be sold on the proposal.
- Raising the age-limit at the converted facilities also holds appeal with swing voters who do not initially support the proposal.

Don't overplay the economic development benefits – keep the focus on jobs.

- Arguments that talk about broader economic development in the local communities fall flatter than promoting how the expanded casinos will create good-paying jobs with benefits.

Support for casinos tend to be highest before the campaigns become public. Consequently, it will be hard to maintain the initially slim support for a new casino on Long Island.



Thank You

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