



TO: Interested Parties  
FROM: Brock McCleary, President  
Date: April 28, 2015  
RE: Key Poll Findings—Online Gambling in Pennsylvania

Our survey of registered voters in Pennsylvania reveals pervasive opposition to the introduction of online gambling in the state. Throughout the survey, there is clear evidence that while Pennsylvanians approve of other types of gambling, they have a sharply negative view of online gambling.

### ***Comparing Types of Gambling***

The State lottery has the best gaming image in the eyes on Pennsylvanians, at 84% favorable. Horse racing tracks (60% favorable) and “casinos with Las Vegas style gambling” (59% favorable) are also viewed favorably by most Pennsylvanians. By comparison, online gambling has a remarkably bad reputation with 72% of voters holding an unfavorable opinion of it (21% favorable). Sixty-four percent say they have a *very* unfavorable opinion of online gambling. Republicans (74% unfavorable), Democrats (67% unfavorable) and Independents (77% unfavorable) all have unfavorable opinions of online gambling. In a stark contrast, majorities of voters from all three parties have a favorable opinion of casinos with Las Vegas style gambling (Republicans: 54% favorable, Democrats: 64%, favorable Independents: 56% favorable).

### ***Approval of Existing Gambling in Pennsylvania***

A strong 63% of those surveyed approve of “allowing gambling in Pennsylvania as a way to generate revenue for the state.” Fifty-eight percent of women and 68% of men echo this opinion. When asked whether they favor or oppose “the State Legislature approving new gambling operations in the state of Pennsylvania as a way to deal with the two billion dollar state budget deficit,” however, 41% favor such an expansion while 53% oppose. Women are stronger in their opposition to a generic expansion (36% favor, 56% oppose) than men (47% favor, 50% oppose).

### ***Online Gambling Proposal in State Legislature***

When asked whether they support or oppose the legislation in the State Legislature, a resounding 73% of voters in Pennsylvania oppose legalizing online gambling. Opposition increases to 75% among Republicans, 78% among women and self-identified Conservatives, and 81% among Independents. The only age group and the only demographic group overall to initially favor online gambling is younger voters, ages 18 to 39 (52% favor, 40% oppose). All other age groups strongly oppose online gambling (40-54: 74% oppose, 55-65: 78%, 66+: 82%). Opposition holds across all media markets (Philadelphia: 74% oppose, Wilkes-Barre: 76%, Erie: 85%, Pittsburgh: 70%, Johnstown: 65%, Harrisburg: 73%). See *Chart 1 for a further breakdown of this question by party, ideology, and gender.*

More than two-thirds of registered voters say online gambling is *very* different from other types of gambling (68%), further illustrating the distinct separation of online gambling in the minds of voters. Conservatives (71%), Moderates (69%), and Liberals (59%) all agree that online gambling is in a class of its own. See *Chart 2 for additional information by party and age.*

### **Arguments For & Against**

See Table 1 for a breakdown of the message tests against online gambling ranked by effectiveness. All of the messages were highly effective, making at least 74% of those surveyed less likely to favor legalizing online gambling. The most effective argument was about the potential for children to be exposed, which appeals to a wide range of demographic groups. Even the two messages provided as “pro-online gambling” arguments earn high ‘less likely’ numbers, reflecting the fact that voters are so strongly predisposed to disliking online gambling regardless of what arguments they hear in support of it.

After hearing additional information, opposition to legalizing online gambling in Pennsylvania increases from 73% to 83% while support decreases from 22% to 14%. On the informed ballot, younger voters switched their opinion to oppose (37% favor, 59% oppose) and opposition has grown from 67% to 77% among men. Chart 3 provides the informed opinion by party, ideology, and gender for comparison to the initial opinion.

### **Electoral Impact**

A majority (54%) would be more likely to vote to re-elect their state legislator “if they strongly opposed legalizing online gambling in the state.” Only 16% would be less likely to vote for their state legislator because of this, while 26% say it makes no difference in their opinion. Opposition to online gambling may have slightly more influence on the vote of women (56% more likely) than men (51% more likely). Chart 4 further outlines the positive electoral impact of opposing online gambling among all parties and ideologies.

### **Summary**

Pennsylvanians stand in clear opposition to online gambling and that sentiment is only likely to intensify. The survey shows that arguments in favor of online gambling fall flat. All of the arguments in opposition to online gambling proved highly effective and can help further solidify public opinion against online gambling. Since voters view online gambling as a negative, separate entity from other types of gambling, this can be accomplished without damaging the opinion of gambling in general. The survey clearly demonstrates that any attempt to legalize online gambling in Pennsylvania faces an electorate ready to hold proponents accountable.

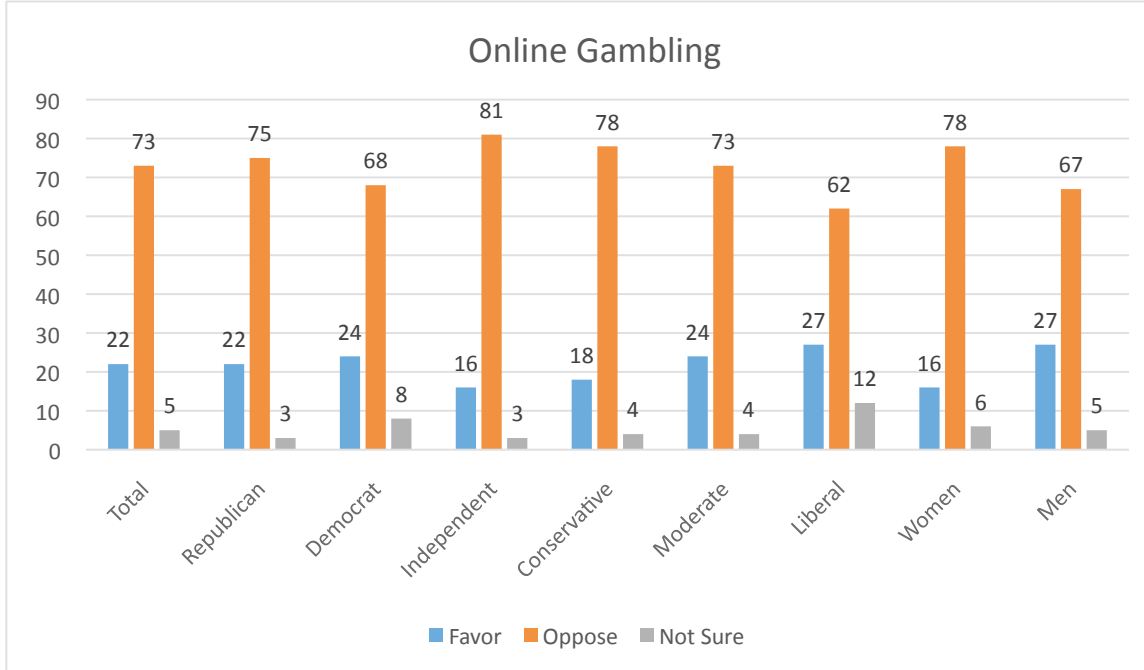
### **METHODOLOGY:**

The sample size for the survey is 513 registered voters in Pennsylvania and the margin of error is +/- 4.33%. Responses were gathered through Landline and Cell phone interviews using live operators. The survey was conducted April 22-27, 2015 by Harper Polling. The total percentages for responses may not equal 100% due to rounding.

## Appendix

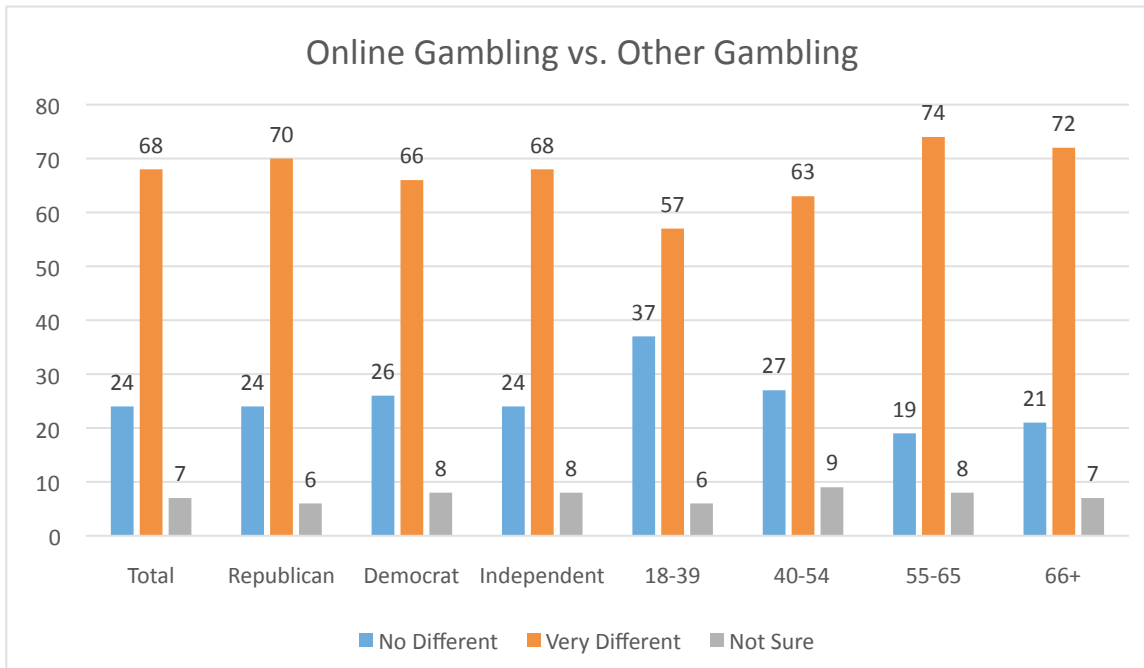
### Chart 1

**Q:** Legislation is being considered in the Pennsylvania state legislature which would legalize and regulate online gambling in Pennsylvania. Do you favor or oppose legislation to legalize online gambling in Pennsylvania?



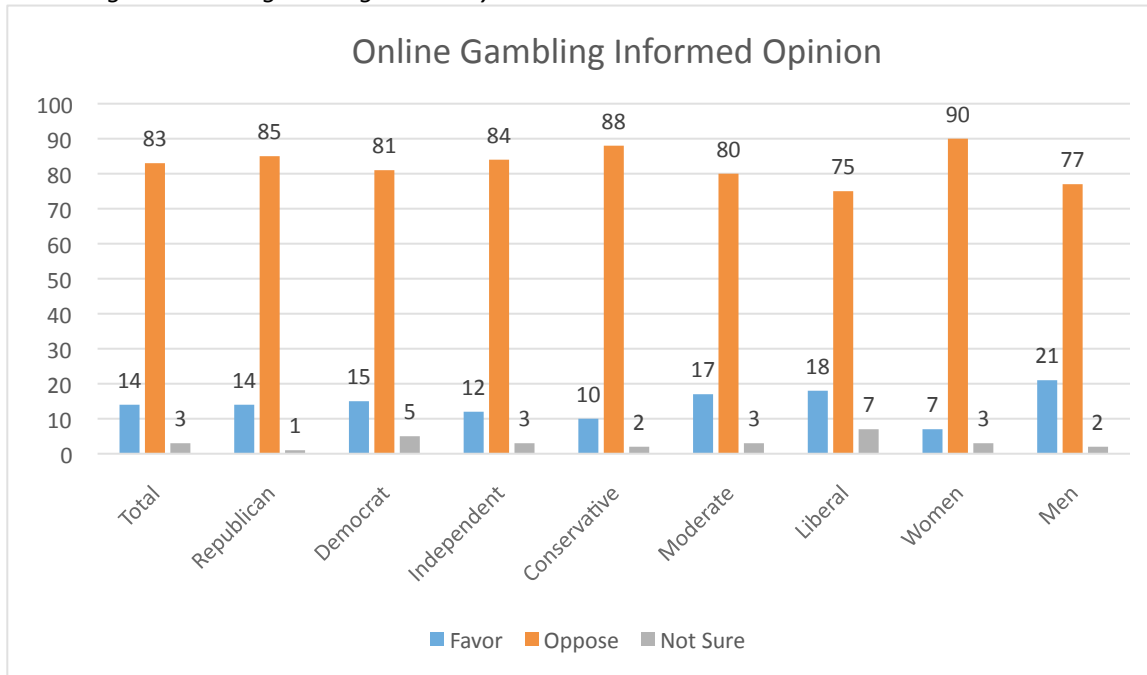
### Chart 2

**Q:** Now I am going to read you two viewpoints about online gambling. Please tell me which viewpoint comes closest to your opinion. Some say that online gambling is no different than the other types of gambling that already exist in casinos in Pennsylvania and that it is simply an extension of gambling options in this technological age. Others say that online gambling is very different from other types of gambling that already exist in casinos in Pennsylvania and that there are a number of key problems and potential abuses with online gambling that do not exist with traditional casino gambling.



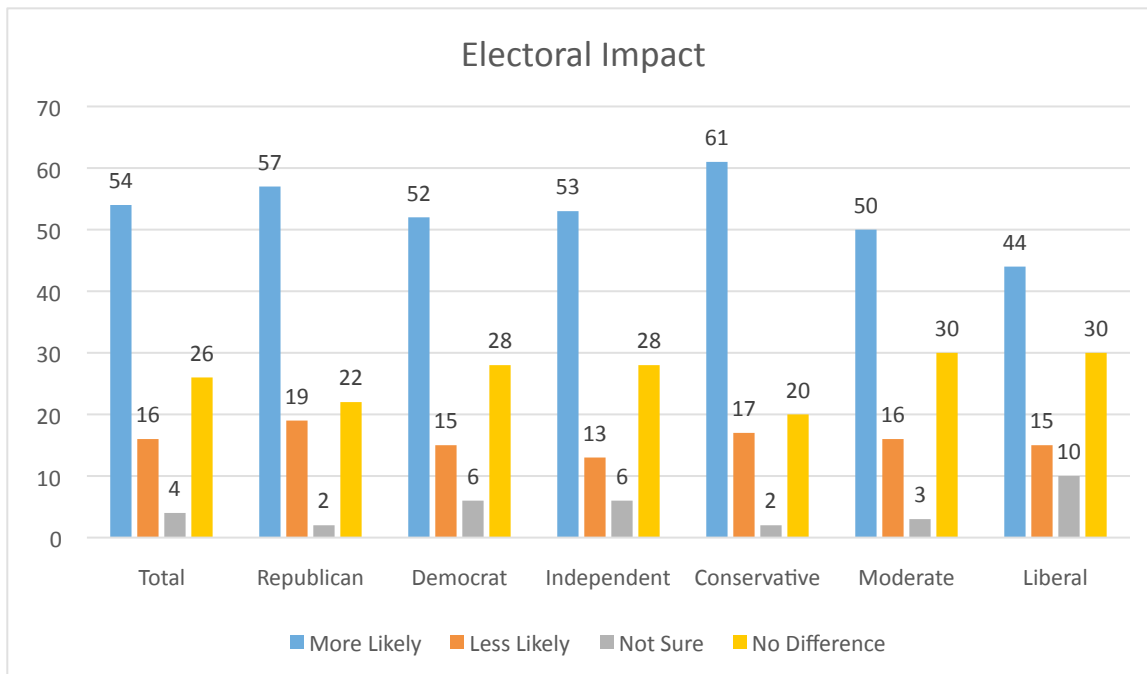
**Chart 3**

**Q:** Now that you have heard some additional information, do you favor or oppose legislation which would legalize online gambling in Pennsylvania?



**Chart 4**

**Q:** Would you be more likely or less likely to vote to re-elect your state legislator if they strongly opposed legalizing online gambling in the state?



*Note: All numbers are percentages.*

**Table 1**

**Q:** Now I am going to read you a series of statements about online gambling. Please tell me whether each statement makes you more likely or less likely to favor legislation to legalize online gambling in Pennsylvania. If it makes no difference to your opinion, you can tell me that too.

**Ranked by % Total Less Likely**

Message	Total Less Likely	Much Less Likely	Republican Less Likely	Democrat Less Likely	Independent Less Likely	Men Less Likely	18-39 Less Likely
Legalizing online gambling in Pennsylvania will make it easy for children to be exposed to and participate in gambling, since it is nearly impossible to prevent minors from gambling online.	80%	75%	81%	80%	79%	76%	71%
The legislation being considered in the state legislature does not contain specific language to prevent “bad actors,” or people or businesses with a history of illegal activity, from being part of Pennsylvania’s online gambling industry.	77%	72%	77%	75%	78%	75%	66%
As the FBI told Congress last year, “online casinos are vulnerable to a wide array of criminal schemes,” and “may provide more opportunities for criminals to launder illicit proceeds with increased anonymity.”	76%	71%	73%	77%	77%	75%	65%
Traditional brick-and-mortar casinos in Pennsylvania have already had significant impacts on their local economies through job creation and community development. Online gambling is a job killer that does not involve any local community investment.	76%	70%	77%	74%	75%	74%	65%
Online gambling is designed to replace people with computers and would threaten both existing jobs and future job creation at casinos in Pennsylvania.	76%	70%	78%	75%	75%	72%	66%
In the three states that have legalized online gambling, state revenue from taxes on online gambling has been minimal and has fallen well short of projections.	74%	70%	76%	74%	70%	74%	64%