

MEMORANDUM

TO: LAS VEGAS SANDS CORPORATION

FROM: DAVE SACKETT

RE: VOTER ATTITUDES TOWARDS INTERNET GAMBLING

DATE: OCTOBER 9, 2013

The Tarrance Group is pleased to present the Las Vegas Sands Corporation with the key findings from a survey of voter attitudes in four states – California, Kentucky, Virginia, and Pennsylvania – regarding internet gambling. These key findings are based on telephone interviews with a total of N=2,216 “likely” registered voters throughout these four states. Responses to this survey were gathered during the period between June-October, 2013. The margin of error associated with the sample for each of these studies is $\pm 4.3\%$ in 95 out of 100 cases.

KEY FINDINGS

- Voters in these four states are largely “pro-gaming.” Sixty percent (60%) of voters in these four states approve of their state allowing gaming as a way to generate revenue for the state, and only thirty-five percent (35%) are opposed.

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
Allow gaming to generate revenue:	Approve	66%	57%	61%	54%	60%
	Disapprove	29%	37%	35%	40%	35%

- It is also the case that a majority of voters in both California and Pennsylvania favor their state expanding gambling as a way to generate additional revenue for the state to help deal with budget issues.

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
New gambling to deal with deficit	Favor	54%	48%	---	---	51%
	Oppose	41%	48%	---	---	45%

- In three of the four states, the fundamental view that voters have of “casinos with Las Vegas style gaming” are quite positive, with fifty-three percent (53%) indicating that they have a positive view of these casinos and only thirty-nine percent (39%) indicating that they have a negative view.

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
Casinos with Las Vegas style gaming	Positive	57%	58%	53%	44%	53%
	Negative	35%	34%	41%	48%	39%

- However, voters in all four states have a universally different (and far more negative) view of internet gambling and internet poker. As you can see from the chart below, over 60% of voters in each of these four states indicate that they have a negative view of internet gambling/poker.

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
Internet gambling/poker	Positive	21%	26%	24%	18%	22%
	Negative	69%	61%	63%	72%	66%

- Further confirming evidence of the fact that voters view internet gambling/poker very differently than they do traditional forms of gambling was found in the results of the “competing thematic” that respondents were exposed to.

*Some people say/
Other people say that internet gambling is no different than the other types of gambling that already exist, and that it is simply a natural extension of gambling options in this technological age.*

*Other people say/
Some people say that internet gambling is very different from other types of gambling that already exist and that there are a number of key problems and potential abuses with online gambling that do not exist with traditional casino gambling.*

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
Online vs. traditional gambling	No difference	27%	30%	32%	31%	30%
	Very different	63%	58%	51%	56%	57%

- The data from the surveys in Kentucky and Virginia found strong support for the current ban on internet gambling, with almost sixty percent (60%) indicating that they favor the current ban on internet gambling.

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
Current Ban on internet gambling	Favor	---	---	63%	55%	59%
	Oppose	---	---	27%	33%	30%

- Finally, the data from these four states shows a universal opposition to any proposal that would legalize internet gambling or internet poker. As you can see from the chart below, over 60% of voters in these four states are opposed to any proposal to legalize internet gambling or internet poker, and this opposition is strong in each state.

		<u>PA</u>	<u>CA</u>	<u>KY</u>	<u>VA</u>	<u>Mean</u>
Legalizing Internet gambling/poker	Favor	32%	30%	35%	27%	31%
	Oppose	64%	63%	58%	66%	63%

- Even among those voters in each of these four states that self-identify as “active gamblers”, a solid majority in each of the four states indicate that they would be opposed to allowing internet gambling or internet poker.

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