

Casino
Survey Report
Prepared for

Greater Sudbury
**Chamber of
Commerce**



**Chambre de
commerce**
du Grand Sudbury

By



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Methodology & Logistics

Overview

- The following represents the findings of a public opinion survey of business members of the Greater Sudbury Chamber of Commerce.

Study Sample

- The Chamber of Commerce provided Oraclepoll with a valid database of 1,032 member contacts including phone numbers and names.
- A total of 275 surveys were completed.
- All members were contacted at least four times by telephone to complete the survey.

Survey Method

- All surveys were conducted using computer-assisted techniques of telephone interviewing (CATI).
- A total of 20% of all interviews were monitored and the management of Oraclepoll Research supervised 100%.
- Up to five attempts were made to contact each contact.
- Telephone appointments were attempted and arranged for those requesting this and the online option was provided to those refusing to complete surveys by phone.

Logistics

- The surveys were conducted between the days of August 21st to August 30th 2013.

Confidence

- The margin of error for the survey is +/-5%, 19/20 times.

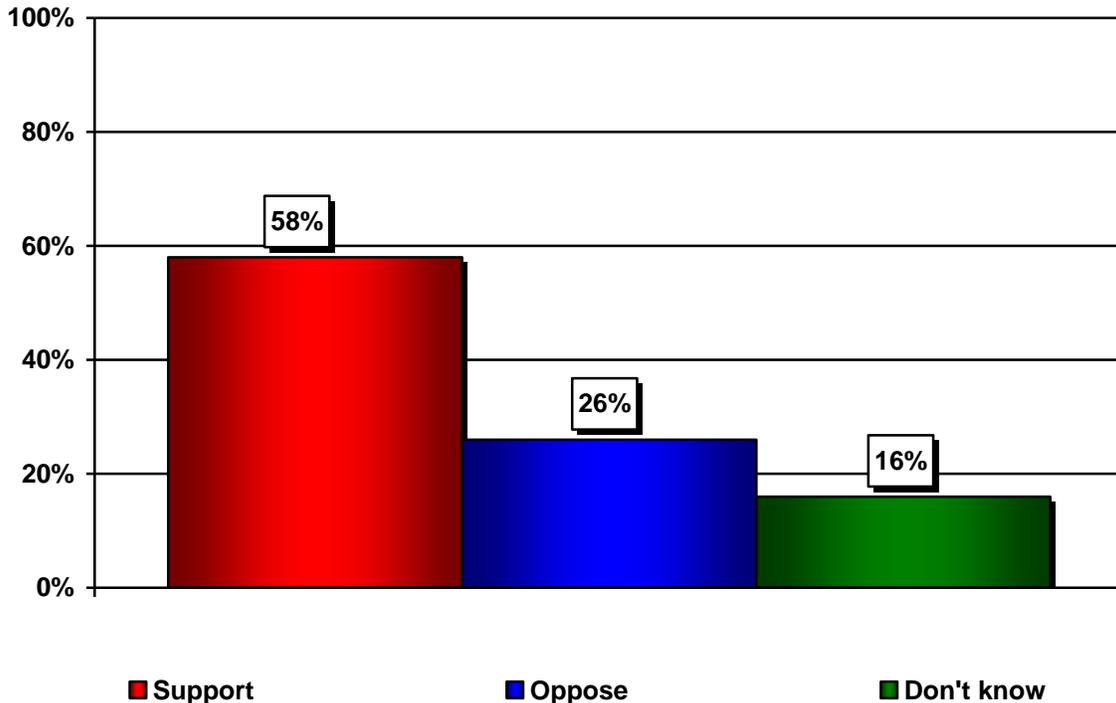
Executive Summary

All respondents were first read the following preamble about a proposed casino development and then a follow up question on their support or opposition to it.

“In response to the announcement by the Ontario Government to end the agreement between Ontario Lottery and Gaming (OLG) and racetracks across the province, Sudbury City Council passed a motion in March 2012 stating their continued support for gaming in the community. In August 2012, City Council passed another motion welcoming OLG’s move to modernize the gaming and lottery structure in the province and announced their support for potential casino developers including a plan to sell municipal property for a new facility. In October 2012, the City held a public open house to receive views from citizens on the proposed locations and potential ancillary facilities.’

‘The Greater Sudbury Chamber of Commerce would like to determine the level of support or opposition from its Members for the proposed new full casino within the City boundaries.’

“Do you support or oppose the development of a full casino in the City of Greater Sudbury that would include an increase in the current number of slots and the introduction of gaming tables?”



Almost six in ten or 58% of members interviewed support the development of a full casino in the City of Greater Sudbury, compared to slightly more than a quarter or 26% that oppose it, while 16% did not know or were unsure.

Those in favor of the development were asked about their **reasons for supporting it**, of which 36% said that it would be good for the local economy, generating revenues, 15% felt it would create jobs or attract business, 15% attract tourists, 9% improve the downtown, 6% add more entertainment to the area, 4% because we already have one and 3% would back it as long as it was not downtown. A total of 9% were unsure or did not know.

On the other hand, opponents were asked about their **reasons for not backing it** with 18% naming a dislike of gambling, 16% citing no perceived benefits, 14% that the City already has one and 12% that gambling is an addiction that takes money from people. A total of 10% do not want the casino downtown, 10% only favor the existing location or one in the outer communities, 10% named a lack of space or suitable infrastructure available, 4% prefer other types of entertainment and 3% claim that there are better uses for capital or money.

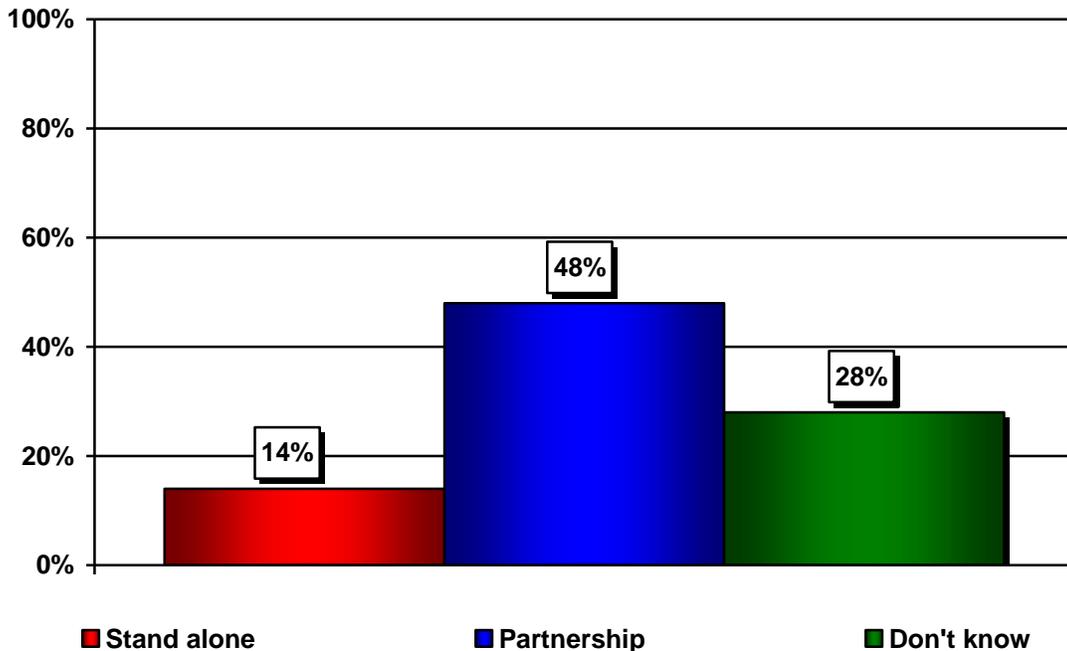
All respondents were then asked the following question about a location.

<i>“Regardless of your support or opposition, if a new full casino were to be developed in the City, which of the following proposed areas would you most prefer as a site?”</i>	%
The current Sudbury Downs location	47%
The Downtown core	26%
Don't know / undecided	10%
The South End of the City	9%
Kingsway Drive East	8%

When asked about a location regardless of their support or opposition, the current Sudbury Downs was most favored by 47%, next followed by the Downtown by a lesser 26%, while the South End (9%) and Kingsway (8%) battled it out for third and fourth spot respectively. A total of 10% did not know or had no opinion.

All respondents were also asked the following

“If a new full casino were developed, should it be a stand alone facility or one that is in partnership with another operator that could offer additional services or amenities?”

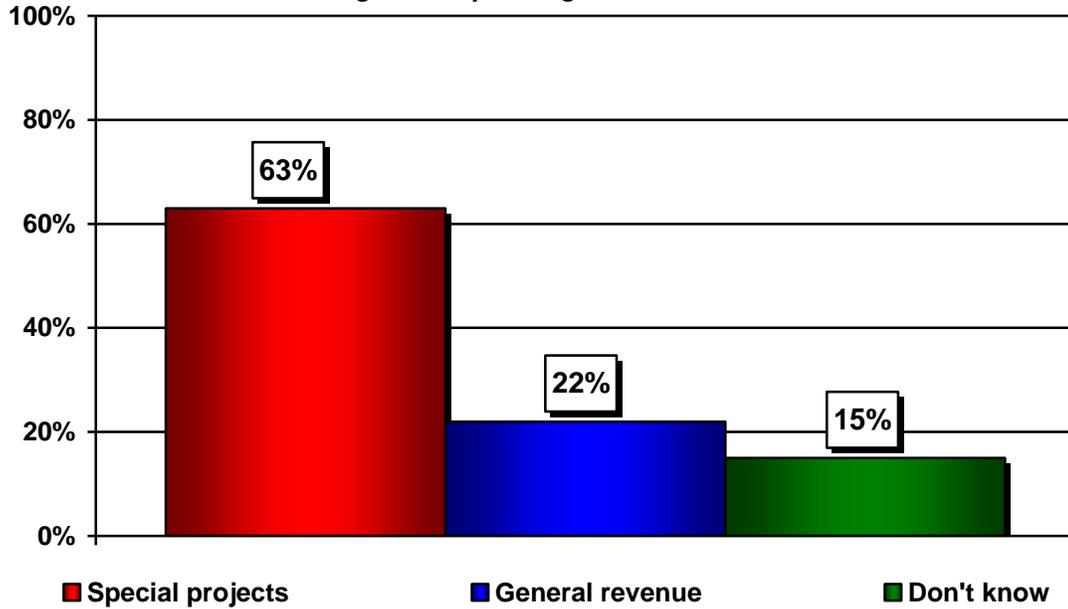


Almost half or 48% favor some form of partnership, compared to only 14% a stand alone facility, while a significant 28% did not know.

An open ended probe was then asked about **the additional amenities or services** that they would like to see at a new casino, of which 31% did not know and a further 3% said none other. Among those with an opinion, most cited was a hotel (24%), followed by a convention centre (16%), a concert or entertainment centre (10%) and restaurants (8%). Other comments included horse racing (3%), an addictions centre (2%), a sports area (1%), a theatre (1%) and shopping (1%).

In a final question respondents were asked the following about revenue from the casino.

“If a new full casino were developed, should any new additional OLG gambling revenue be earmarked by the municipal government towards special projects in the community or should they remain part of general operating revenue?”



A 63% majority favor the gambling monies being directed to special projects, 22% having the funds going to general revenue, while 15% did not know.

Results by Question

Q1. Do you support or oppose the development of a full casino in the City of Greater Sudbury that would include an increase in the current number of slots and the introduction of gaming tables?

	Percent
Support	57.8
Oppose	26.5
Don't know / Refused	15.6
Total	100.0

IF SUPPORT ASK Q1B / IF OPPOSE ASK Q1C / IF DON'T KNOW SKIP TO Q2

Q1b. Can you tell me why you support the development?

	Percent
Good for the local economy / revenues for the City	35.8
Would create jobs / attract businesses	15.1
Will attract tourists	14.5
Will help improve the downtown	8.8
Don't know	8.8
More entertainment	5.7
We already have one	3.8
As long as it's not downtown	2.5
For people that like to gamble / play poker	1.9
Other cities have them / will have	1.9
If it was a full convention centre	1.3
Total	100.0

Q1c. Can you tell me why you oppose the development?

	Valid Percent
Don't believe in / don't like gambling	17.8
There is no benefit for the City	16.4
We already have one here / upgrade the current one	13.7
Gambling addictions / takes money from people	12.3
Don't want it downtown	9.6
Only if it is in the outer communities / current location	9.6
Suggested locations lack infrastructure / space etc	9.6
Prefer other forms of entertainment	4.1
There are better things to spend the money on	2.7
Increase in crime	1.4
May be bad for small businesses / of no benefit	1.4
May take money from community	1.4
Total	100.0

Q2. Regardless of you support or opposition, if a new full casino were to be developed in the City, which of the following proposed areas would you most prefer as a site?

	Valid Percent
The current Sudbury Downs location	46.9
The Downtown core	25.5
Don't know / undecided	10.2
The South End of the City	9.5
Kingsway Drive East	8.0
Total	100.0

Q3. (And) If a new full casino were developed, should it be a stand alone facility or one that is in partnership with another operator that could offer additional services or amenities?

	Valid Percent
Partnership	57.5
Don't know / undecided	28.0
Stand alone	14.5
Total	100.0

Q4. What other additional services or amenities would you most like to see?

	Percent
Don't know	30.5
Hotel	24.0
Convention centre	16.4
Concert / entertainment centre	9.5
Restaurants	7.6
Nothing	3.3
Horse racing	2.5
Gambling addiction centre	2.2
Sport arena	1.5
Theatre	1.1
More shopping	.7
Adult entertainment	.4
Free transportation	.4
Total	100.0

Q5. Finally, if the new casino were developed, should any new additional OLG gambling revenues be earmarked by the municipal government towards special projects in the community or should they remain part of general operating revenue?

	Percent
Earmarked for special projects	63.3
Part of general revenue	21.8
Don't know / undecided	14.9
Total	100.0