Kitchener Casino Consultation

April 2013

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Research Methodology

- Findings in this report are based on an Ipsos Reid survey conducted between April 10th to 15th, on behalf of Bingemans.

- For this survey, a sample of 502 City of Kitchener residents was interviewed via telephone. Quotas on age and gender were used to ensure balanced demographic sampling.

- A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-4.4 percentage points, 19 times out of 20, of what the results would have been had all City of Kitchener residents been surveyed.

- Weighting was applied to ensure that the sample's composition as closely as possible reflects the demographic distribution of Kitchener residents.

- All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

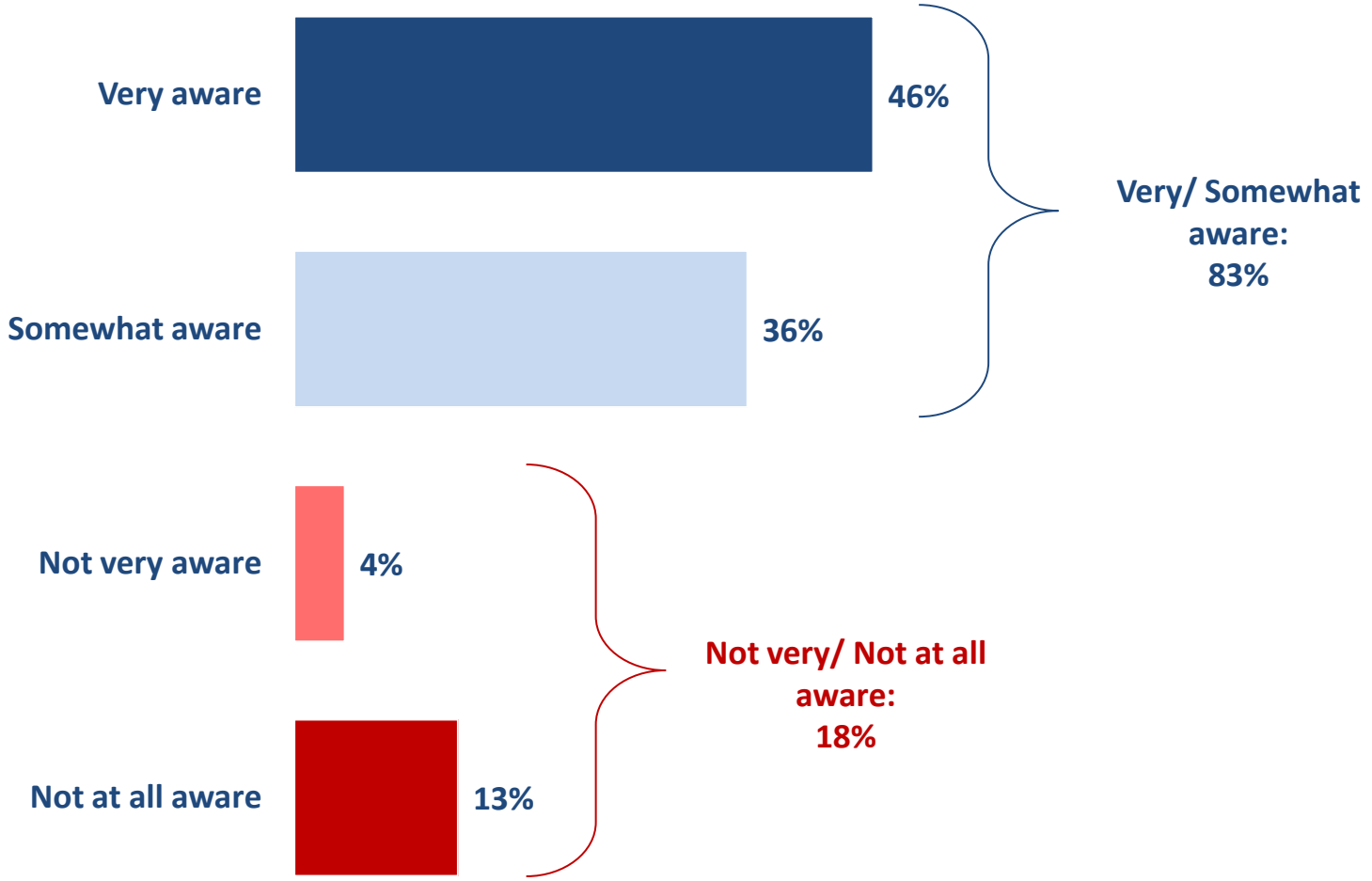
Executive Summary

- Most residents of Kitchener are aware of the OLG's plans to consult municipalities on their interest for a casino. In fact, two thirds believe that the City of Kitchener should be open to having a conversation about potentially hosting a casino in Kitchener and what that might mean for the city.
- Most appear to have at least some degree of knowledge about what a casino could mean for the city of Kitchener (although few are very knowledgeable), and two thirds want to learn more about various proposals that might come forward to build a casino and the impact that it could have on the city.
- Residents believe that the primary benefits of a casino would be increased revenue for the city, jobs, tourism and economic benefits.
- Residents believe that the primary challenges of a casino would be gambling addiction, traffic, crime and poverty.
- Location is a critical factor for a potential casino in Kitchener, and it appears that location could help to change some people's minds about a casino.

Detailed Findings

Awareness of OLG Soliciting Interest from Municipalities

•Four in five (83%) Kitchener residents are 'aware' of how the OLG has been asking communities around the province about their interest in potentially hosting a casino in their municipality, with half (46%) being 'very aware'. Only one in five (18%) are 'not aware' of these events.



Q. Now, as you may know, the Ontario Lottery and Gaming Commission (OLG) has been asking cities and communities across the province whether or not they have an interest in potentially hosting a casino in their municipality. Communities that say they are not interested will not be a part of the discussion and will not be considered for a casino. Before today, how aware of this were you? Were you…(
Base: All Respondents (n=502)

Awareness of OLG Soliciting Interest from Municipalities - Demographics

•Awareness of OLG intentions increases with age among City of Kitchener residents, and men (87%) are nine points more likely to be aware of this than women (78%).

Awareness of Community Support Inquiry from OLG	AGE			Gender	
	18-34	35-54	55+	Male	Female
Aware	67%	85%	96%	87%	78%
Not Aware	33%	15%	4%	13%	22%

Awareness of Community Support Inquiry from OLG	Region									
	N2A	N2B	N2C	N2E	N2G	N2H	N2M	N2N	N2P	N2R
	n=49	n=25	n=67	n=67	n=32	n=51	n=94	n=56	n=54	n=5
Aware	76%	72%	84%	82%	88%	81%	82%	89%	85%	75%
Not Aware	24%	28%	16%	18%	12%	19%	18%	11%	15%	25%

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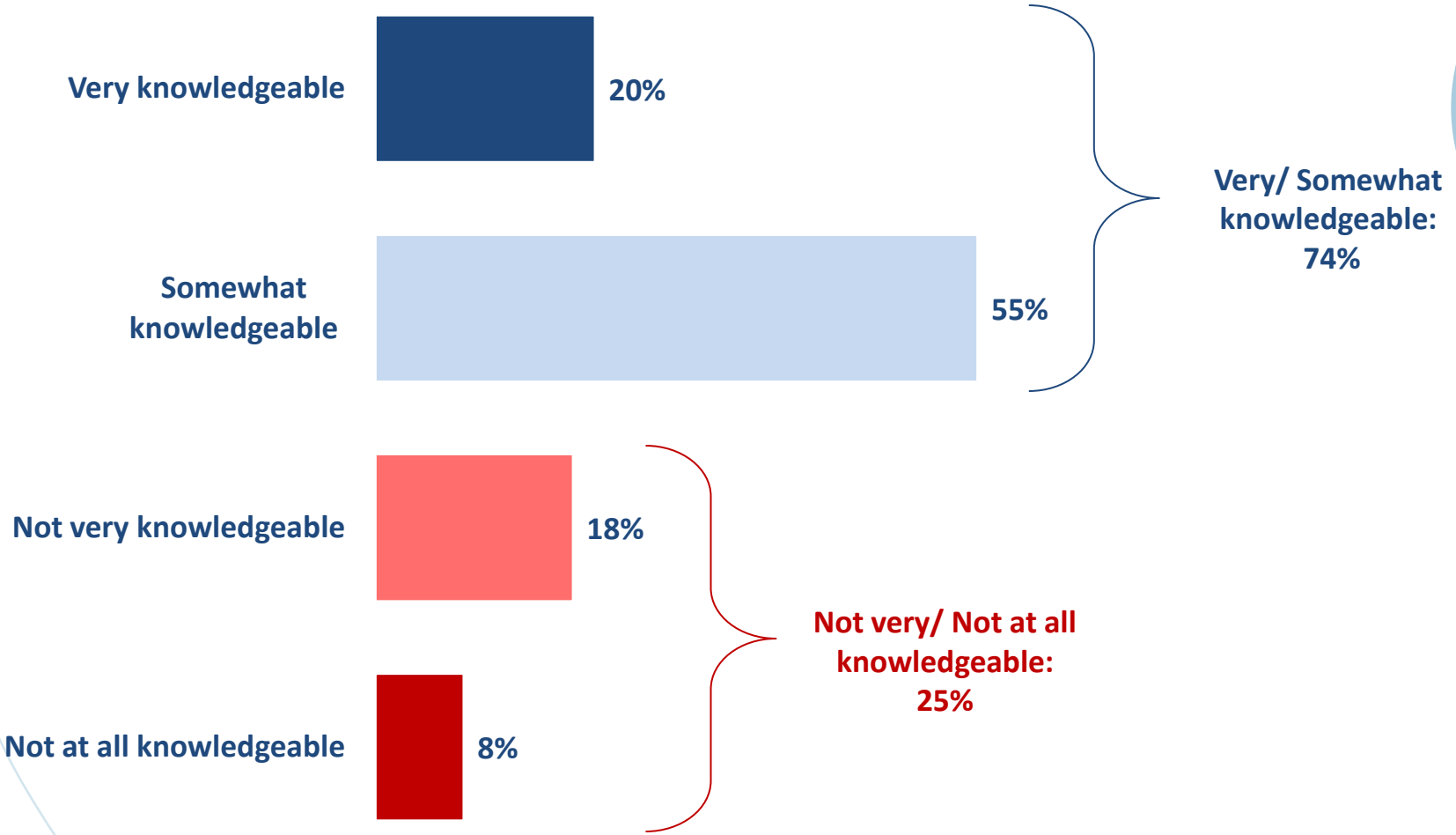
Base: All Respondents (n=502)

Knowledge of Casino Impact

•Three in four (74%) believe that they're 'knowledgeable' about the impact a potential casino would have on Kitchener, but only one in five (20%) claim to be 'very knowledgeable' with a majority (55%) only being 'somewhat knowledgeable'. One quarter (25%) claim to be 'not knowledgeable' (8% not at all/18% not very) about what kind of impact a casino would have on Kitchener.



Q. To what extent do you consider yourself knowledgeable about the impact that a casino would have on Kitchener? Are you…
Base: All Respondents (n=502)

Knowledge of Casino Impact - Demographics

•The older Kitchener residents are, the more likely they are to cite being knowledgeable about a potential casino's impact on the city. Men (79%) are more likely than women (70%) to believe their knowledgeable about potential impacts.

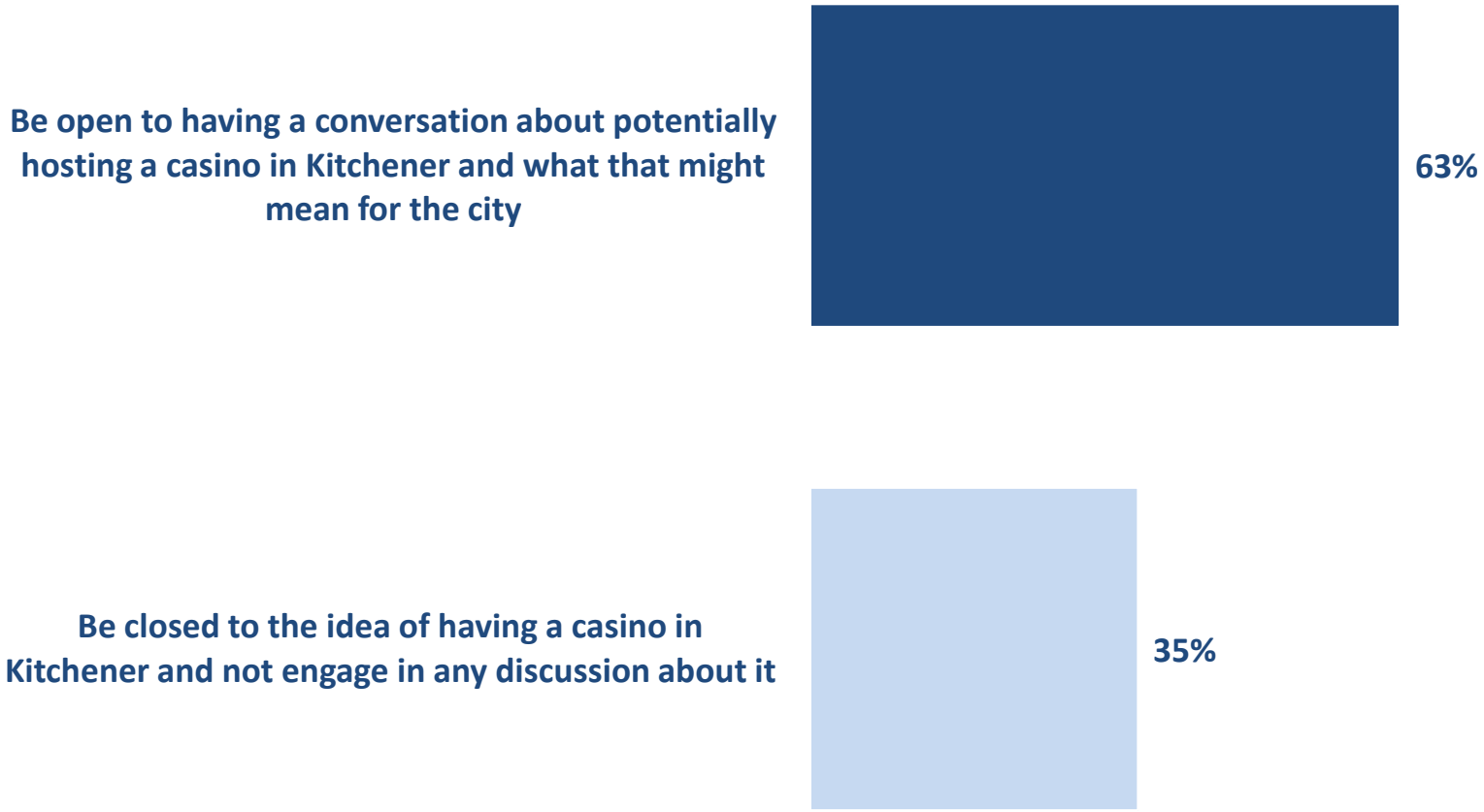
Knowledge of Casino Impact	AGE			Gender	
	18-34	35-54	55+	Male	Female
Knowledgeable	65%	76%	83%	78%	71%
Not Knowledgeable	35%	24%	16%	22%	29%

Knowledge of Casino Impact	Region									
	N2A	N2B	N2C	N2E	N2G	N2H	N2M	N2N	N2P	N2R
	n=49	n=25	n=67	n=67	n=32	n=51	n=94	n=56	n=54	n=5
Knowledgeable	74%	69%	79%	69%	72%	80%	67%	83%	76%	100%
Not Knowledgeable	26%	31%	21%	31%	26%	20%	33%	15%	25%	-

Q. To what extent do you consider yourself knowledgeable about the impact that a casino would have on Kitchener? Are you…
Base: All Respondents (n=502)

Should City be Open to Casino Conversation

•Nearly two in three (63%) believe the City should be open to having a conversation about potentially hosting a casino, while one in three (35%) believe the City should be closed to this idea.



Q. The City of Kitchener will soon begin public consultations about whether or not it wishes to engage in the conversation about potentially hosting a casino in Kitchener and what that might mean for the city. By agreeing to engage in these discussions, and be considered for a casino, it does not mean Kitchener would get a casino. That decision would be made by the City at a later date. Do you think that Kitchener should…
Base: All Respondents (n=502)

Should City be Open to Casino Conversation - Demographics

•A strong majority of residents in every area of the city, across every age demographic and gender believe that the City should be open to having a conversation about potentially hosting a casino in Kitchener and what it might mean for the city.

Should City be Open to Casino Conversation	AGE			Gender	
	18-34	35-54	55+	Male	Female
Be open to having a conversation and what that might mean for the city	62%	65%	62%	64%	62%
Be closed to the idea and not engage in any discussion about it	35%	34%	35%	34%	36%

Should City be Open to Casino Conversation	Region									
	N2A	N2B	N2C	N2E	N2G	N2H	N2M	N2N	N2P	N2R
	n=49	n=25	n=67	n=67	n=32	n=51	n=94	n=56	n=54	n=5
Be open to having a conversation and what that might mean for the city	72%	65%	65%	57%	69%	63%	62%	60%	58%	82%
Be closed to the idea and not engage in any discussion about it	26%	35%	35%	39%	28%	33%	36%	38%	38%	18%

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Base: All Respondents (n=502)

Should City be Open to Casino Conversation – Level of Knowledge

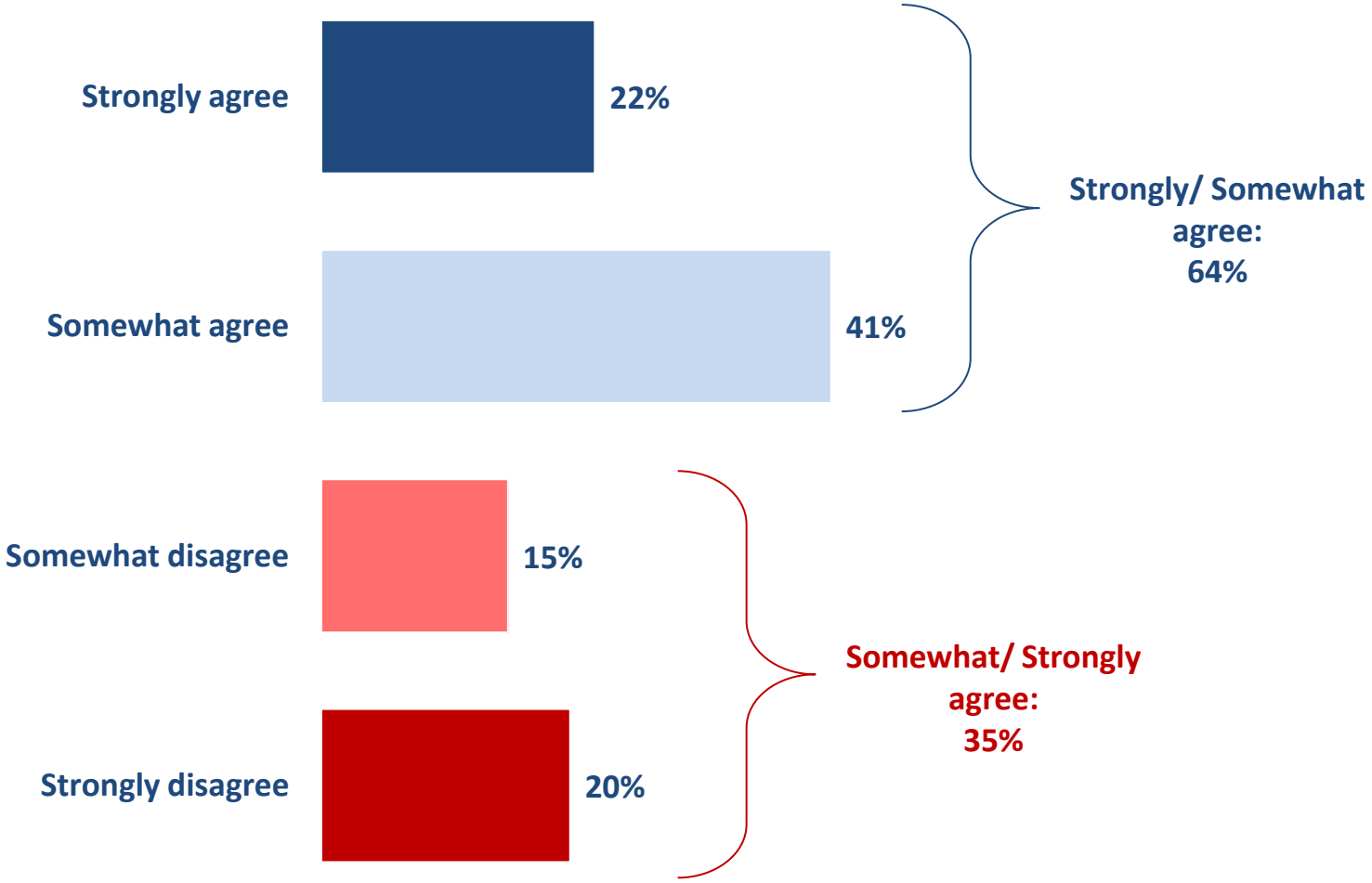
•While all demographic groups studied believe the City should be open to having a conversation about potentially having a casino in Kitchener, those who are currently not knowledgeable about the situation are most open (70%). Still, a majority of those who already claim to be knowledgeable about the subject want the city to be open about having a discussion (61%).

Should City be Open to Casino Conversation	Awareness of Community Support Inquiry from OLG		Knowledge of Casino Impact	
	Aware	Not Aware	Knowledgeable	Not knowledgeable
Open to having a conversation and what that might mean for the city	64%	59%	61%	70%
Closed to the idea and not engage in any discussion about it	35%	35%	38%	26%

Q. The City of Kitchener will soon begin public consultations about whether or not it wishes to engage in the conversation about potentially hosting a casino in Kitchener and what that might mean for the city. By agreeing to engage in these discussions, and be considered for a casino, it does not mean Kitchener would get a casino. That decision would be made by the City at a later date. Do you think that Kitchener should…
Base: All Respondents (n=502)

Want to Learn More About Various Proposals

•Two in three (64%) 'agree' (22% strongly/41% somewhat) that they want to learn more about various proposals that might come forward to build a casino in the city. Conversely, one in three (35%) 'disagree' (20% strongly/15% somewhat) that they want to learn more.



Q. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that you personally want to learn more about various proposals that might come forward to build a casino in Kitchener and the impact that a casino in Kitchener could have on the city?
Base: All Respondents (n=502)

Want to Learn More About Various Proposals

•A majority of residents in each area of the city, in every age group and both genders agree that they want to learn more about various proposals that might come forward to build a casino in Kitchener and the impact that a casino in Kitchener could have on the city.

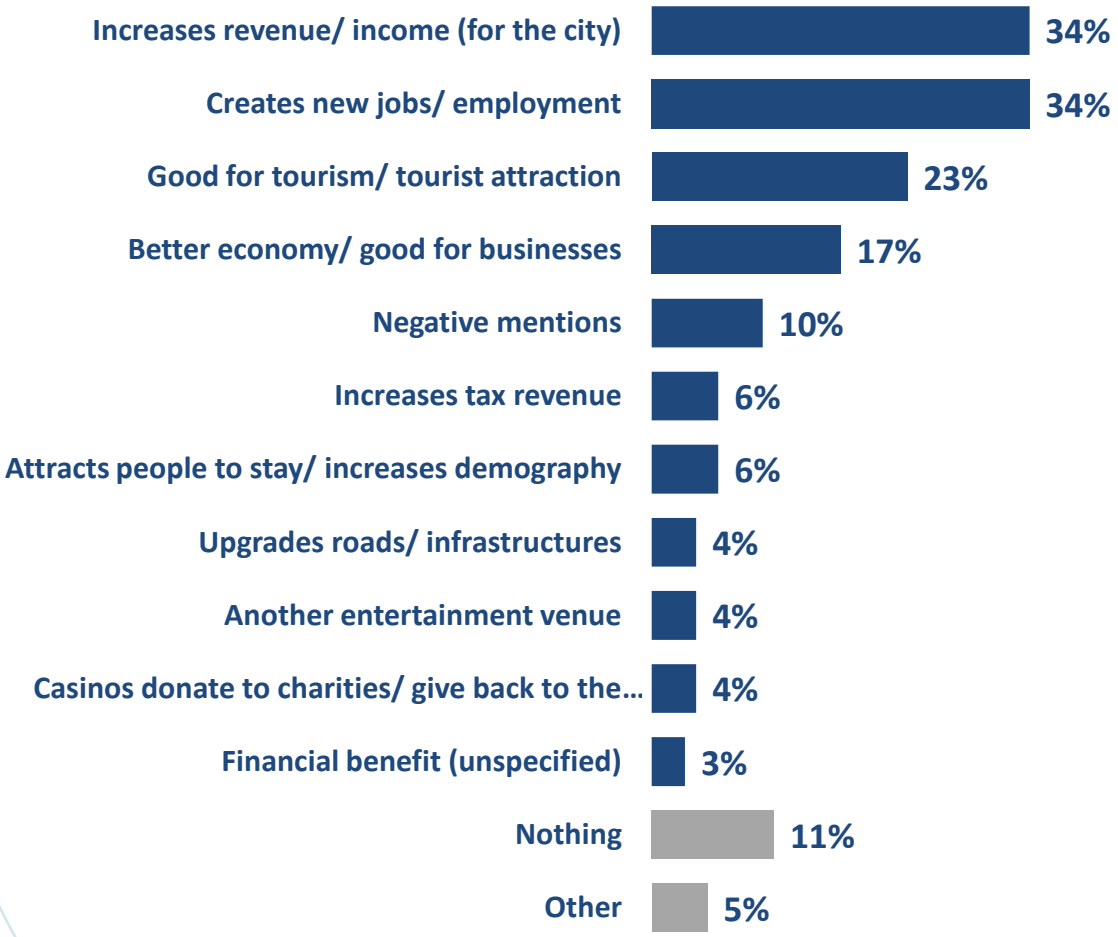
Want to Learn More About Various Proposals	AGE			Gender	
	18-34	35-54	55+	Male	Female
Agree	65%	64%	61%	64%	63%
Disagree	35%	34%	37%	34%	36%

Want to Learn More About Various Proposals	Region									
	N2A	N2B	N2C	N2E	N2G	N2H	N2M	N2N	N2P	N2R
	n=49	n=25	n=67	n=67	n=32	n=51	n=94	n=56	n=54	n=5
Agree	70%	65%	67%	69%	60%	59%	63%	57%	58%	100%
Disagree	29%	31%	32%	31%	41%	41%	35%	40%	41%	-

Q. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that you personally want to learn more about various proposals that might come forward to build a casino in Kitchener and the impact that a casino in Kitchener could have on the city?
Base: All Respondents (n=502)

Benefits of a Kitchener Casino – Unaided

According to residents (unprompted), the top benefits of having a casino in the city are that it would increase revenue for the city (34%) and that it would create new jobs (34%). One in four (23%) mention that having a casino in the city would be good for tourism, and 17% think it would be good for business and the economy. One in ten (10%) couldn't think of any benefits.



Other responses given by <3% of respondents

Q. What do you think would be some of the benefits of having a casino in Kitchener?
Base: All Respondents (n=502)

Benefits of a Kitchener Casino - Demographics

Middle-aged residents (40%) are significantly more likely than younger residents (27%) to believe a benefit of the casino would be increased revenue for the city, while younger (30%) and middle-aged (23%) residents are significantly more likely than seniors (13%) to believe it will be good for tourism.

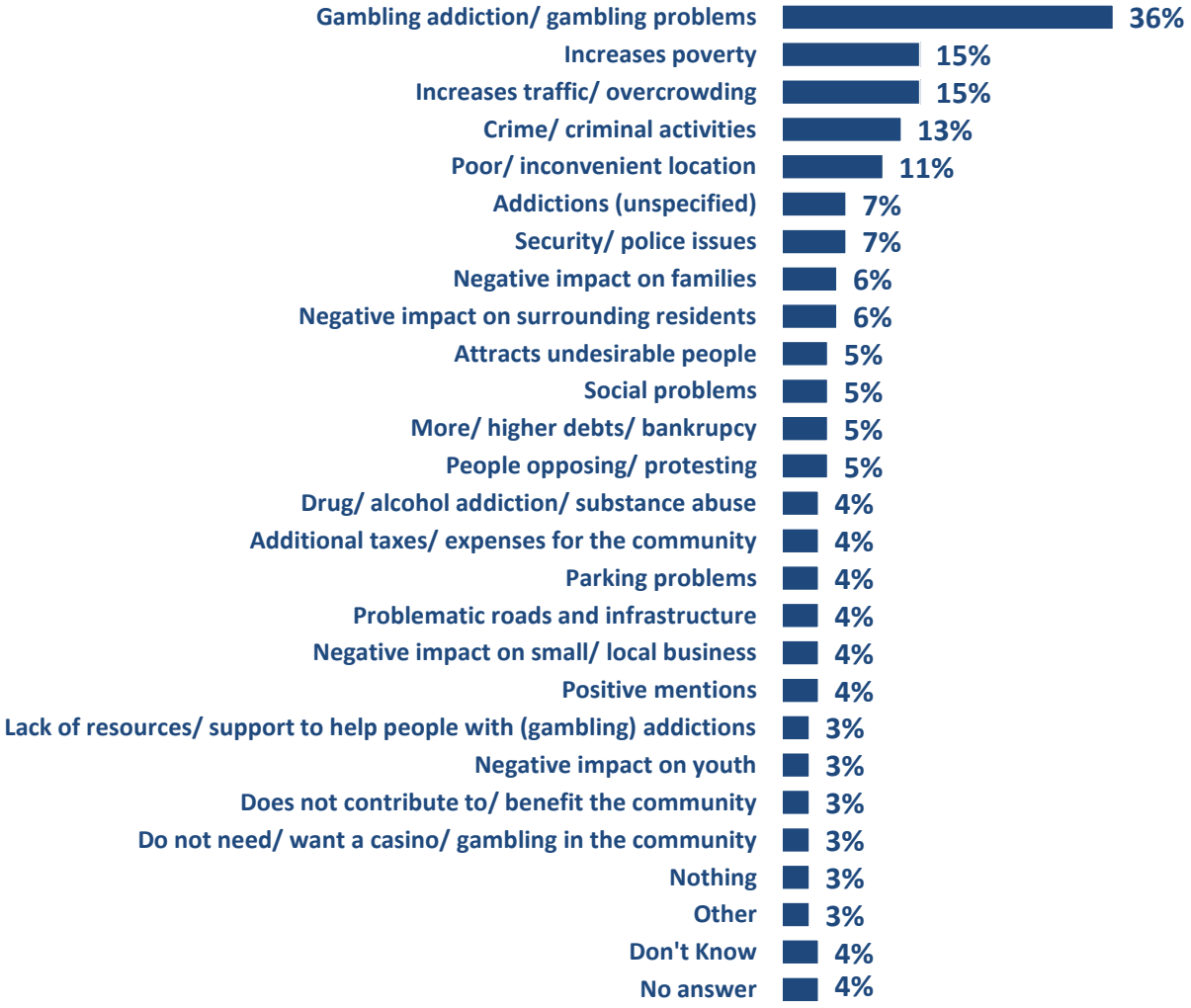
	AGE			Gender	
	18-34	35-54	55+	Male	Female
Increases revenue/ income (for the city)	27%	40%	35%	36%	32%
Creates new jobs/ employment	35%	36%	32%	31%	38%
Good for tourism/ tourist attraction	30%	23%	13%	25%	20%
Better economy/ good for businesses	21%	16%	15%	19%	15%
Negative mentions	8%	6%	17%	10%	9%
Increases tax revenue	3%	9%	5%	8%	4%
Attracts people to stay/ increases demography	6%	7%	4%	4%	8%
Upgrades roads/ infrastructures	6%	2%	4%	5%	3%
Another entertainment venue	7%	2%	3%	3%	5%
Casinos donate to charities/ give back to the community	4%	6%	1%	4%	4%
Financial benefit (unspecified)	3%	2%	4%	3%	3%
Nothing	8%	12%	14%	11%	11%
Other	5%	5%	7%	3%	7%

Other responses given by <3% of respondents

Q. What do you think would be some of the benefits of having a casino in Kitchener?
Base: All Respondents (n=502)

Challenges of a Kitchener Casino – Unaided

•When asked what some of the challenges would be as a result of having a casino in Kitchener, two in five (36%) mention gambling addiction or problems. Others mentioned increased poverty (15%), traffic (15%), crime (13%), or a bad location (11%).



Other responses given by <3% of respondents

Q. And what do you think would be some of the challenges of having a casino in Kitchener?
Base: All Respondents (n=502)

Challenges of a Kitchener Casino – Demographics

•Seniors (20%) are significantly more likely than middle-aged residents to believe that a casino would increase poverty, while middle-aged residents are most concerned about addiction and criminal activity.

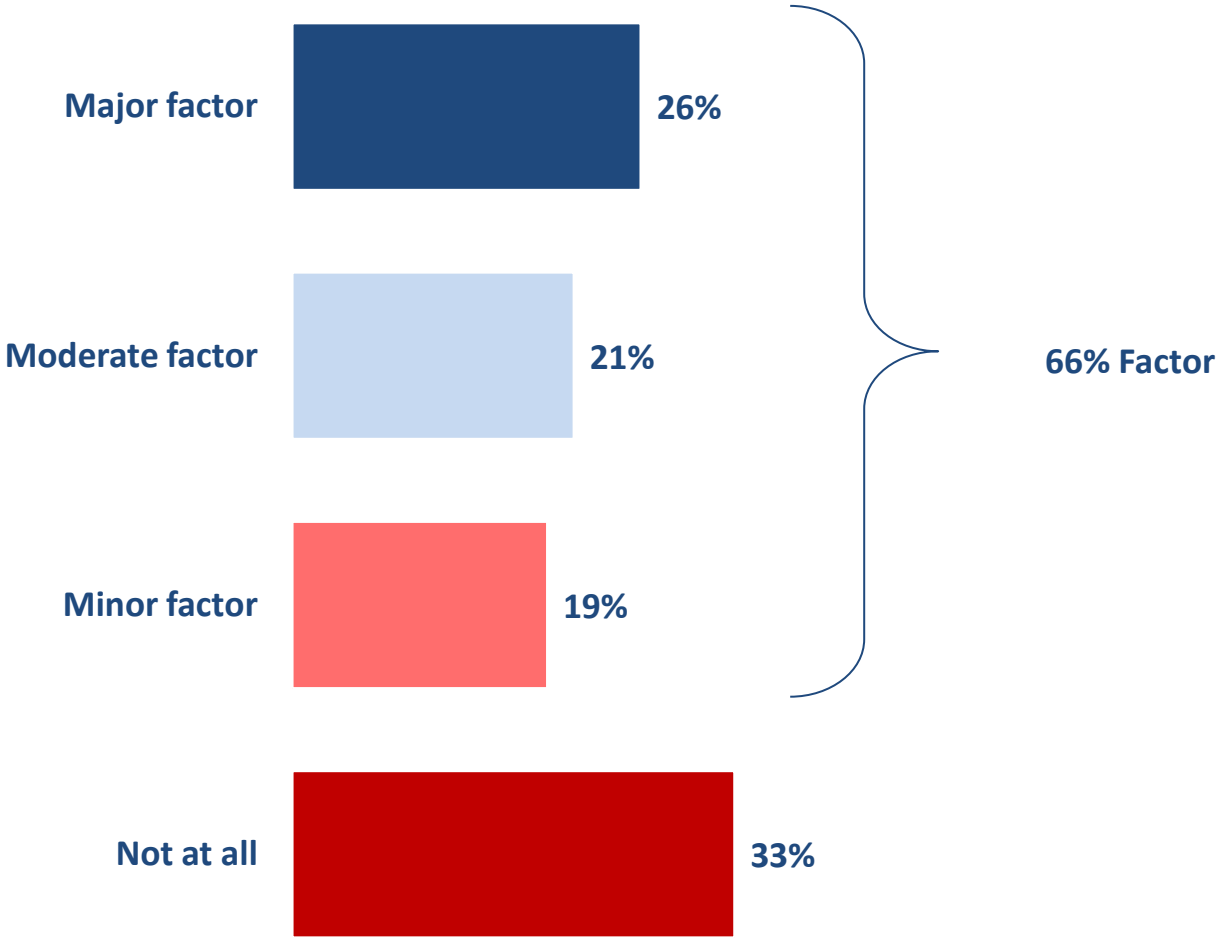
Want to Learn More About Various Proposals	AGE			Gender	
	18-34	35-54	55+	Male	Female
Gambling addiction/ gambling problems	33%	41%	32%	35%	38%
Increases poverty	15%	12%	20%	14%	17%
Increases traffic/ overcrowding	17%	17%	12%	14%	17%
Crime/ criminal activities	11%	18%	10%	16%	10%
Poor/ inconvenient location	12%	8%	12%	9%	12%
Addictions (unspecified)	6%	7%	6%	8%	6%
Security/ police issues	3%	7%	10%	8%	6%
Negative impact on families	2%	8%	7%	4%	7%
Negative impact on surrounding residents	6%	6%	5%	5%	6%
Attracts undesirable people	6%	7%	4%	7%	4%
Social problems	8%	4%	5%	7%	3%
More/ higher debts/ bankrupcy	4%	6%	4%	5%	5%
People opposing/ protesting	5%	6%	5%	7%	4%
Drug/ alcohol addiction/ substance abuse	6%	2%	5%	4%	4%
Additional taxes/ expenses for the community	2%	2%	8%	4%	4%
Parking problems	5%	1%	4%	2%	5%
Problematic roads and infrastructure	6%	2%	5%	6%	3%
Negative impact on small/ local business	6%	2%	2%	4%	3%
Positive mentions	4%	3%	5%	4%	4%
Don't Know	3%	5%	2%	3%	4%
No answer	4%	3%	6%	3%	5%

Other responses given by <4% of respondents

Q. And what do you think would be some of the challenges of having a casino in Kitchener?
Base: All Respondents (n=502)

Casino Location as a Deciding Factor

•Two in three (66%) say the location of a casino would have some factor in their decision for support, with one quarter (26%) citing it as a major factor and another one in five (21%) making it a moderate factor. One in three (33%) say location is not at all a factor in their support for a casino.



Q. To what extent would the location of a casino in Kitchener be a factor for you in deciding whether to support a casino proposal or not? Would it be a…
Base: All Respondents (n=502)

Casino Location as a Deciding Factor - Demographics

•Location as a factor for supporting or opposing a casino diminishes as age increases.

Casino Location as a Deciding Factor	AGE			Gender	
	18-34	35-54	55+	Male	Female
Major/Moderate factor	50%	47%	43%	45%	48%
Minor factor/ Not a factor	49%	51%	56%	52%	52%

Casino Location as a Deciding Factor	Region									
	N2A	N2B	N2C	N2E	N2G	N2H	N2M	N2N	N2P	N2R
	n=49	n=25	n=67	n=67	n=32	n=51	n=94	n=56	n=54	n=5
Major/Moderate factor	51%	52%	48%	47%	60%	46%	42%	45%	42%	44%
Minor factor/ Not a factor	49%	48%	51%	50%	40%	52%	56%	55%	56%	57%

Q. To what extent would the location of a casino in Kitchener be a factor for you in deciding whether to support a casino proposal or not? Would it be a…
Base: All Respondents (n=502)

Demographics

Weighted Demographics

Household Income	
<45k	28%
40k-<100K	45%
100k+	21%
DK/NS	7%

Gender	
Male	50%
Female	50%

Age Group	
18-34	33%
35-54	38%
55+	29%

Level of Education	
<HS	7%
HS	17%
Some Post Sec	38%
Univ Grad	25%
Post Grad	13%

Household Composition	
Kids	45%
No Kids	55%

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