Eric Friedheim Tourism Institute
UNIVERSITY of FLORIDA

Florida Gaming Study: Consumer Attitudes, Preferences & Intentions

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PURPOSE AND METHODOLOGY

Purpose and Methodology

The Eric Friedheim Tourism Institute at the University of Florida conducted a study on behalf of Spectrum Gaming and the Florida Legislature to explore consumer attitudes, perceptions, and intentions toward the possible expansion of gambling in the State of Florida and to gauge the potential impact that expanded gambling could have on the state and its tourism industry. The insights gleaned from this research are intended to enlighten the discussion on the gambling initiative and the related economic impact study.

Respondent Screeners

- Respondents were pre-qualified and screened for inclusion in the study based on the following criteria:
  - Age: 18 years and older;
  - Adults residing in Florida (n=1223);
  - Adults residing in Non-Florida States (n=1213).

Sampling

- The sample was comprised as follows:
  - One (1) quantitative consumer survey conducted online with a total sample of two-thousand four hundred and thirty-six pre-qualified respondents (n=2436) comprised of:
    - One (1) Florida representative probability sample of one thousand two hundred and twenty three (n=1223) Florida residents:
      - The Florida sample included those residing in three regions: 181 residents in North Florida, 553 residents in Central Florida, and 483 in South Florida.
    - One (1) nationally representative probability sample of one-thousand two hundred and thirteen (n=1213) U.S. Residents (Residing in non-Florida States):
      - The U.S. sample included those residing in four regions: 298 residents in the West, 351 residents in the Midwest, 277 residents in the Northeast and 289 residents in the South.

Data Collection

- The data for this study were collected during the month of August, 2013. A 20-minute consumer survey was conducted online with a total sample of twenty-four hundred thirty six (n=2436) pre-qualified respondents.

Research Objectives

- In this study respondents were asked to provide their opinion on the following:
  - Preferences for gambling in general and, specifically, proposed changes to the gambling industry in the State of Florida;
  - The likelihood and type of participation in gambling activities in Florida;
  - Preferred gambling regulations;
  - Travel intentions toward the State of Florida and specific Florida destinations given the presence or absence of expanded gambling venues;
  - Gambling addiction characteristics of the sample;
  - Demography;

Confidence Level

The margin of error for the statistical estimates that appear in this report is ±2.5% at the 95% level of confidence.

Figure 1: Sample Size by U.S. Census Regions

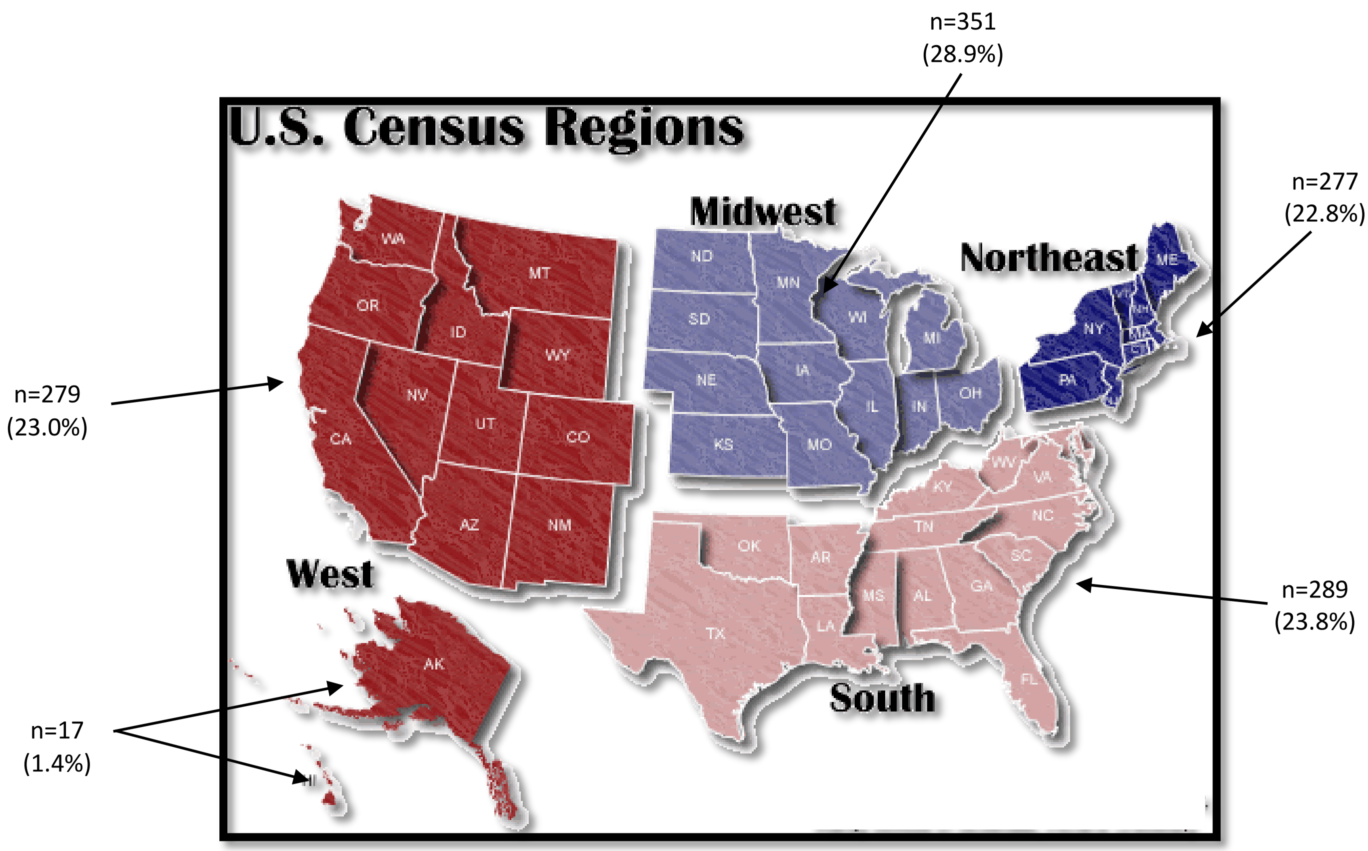
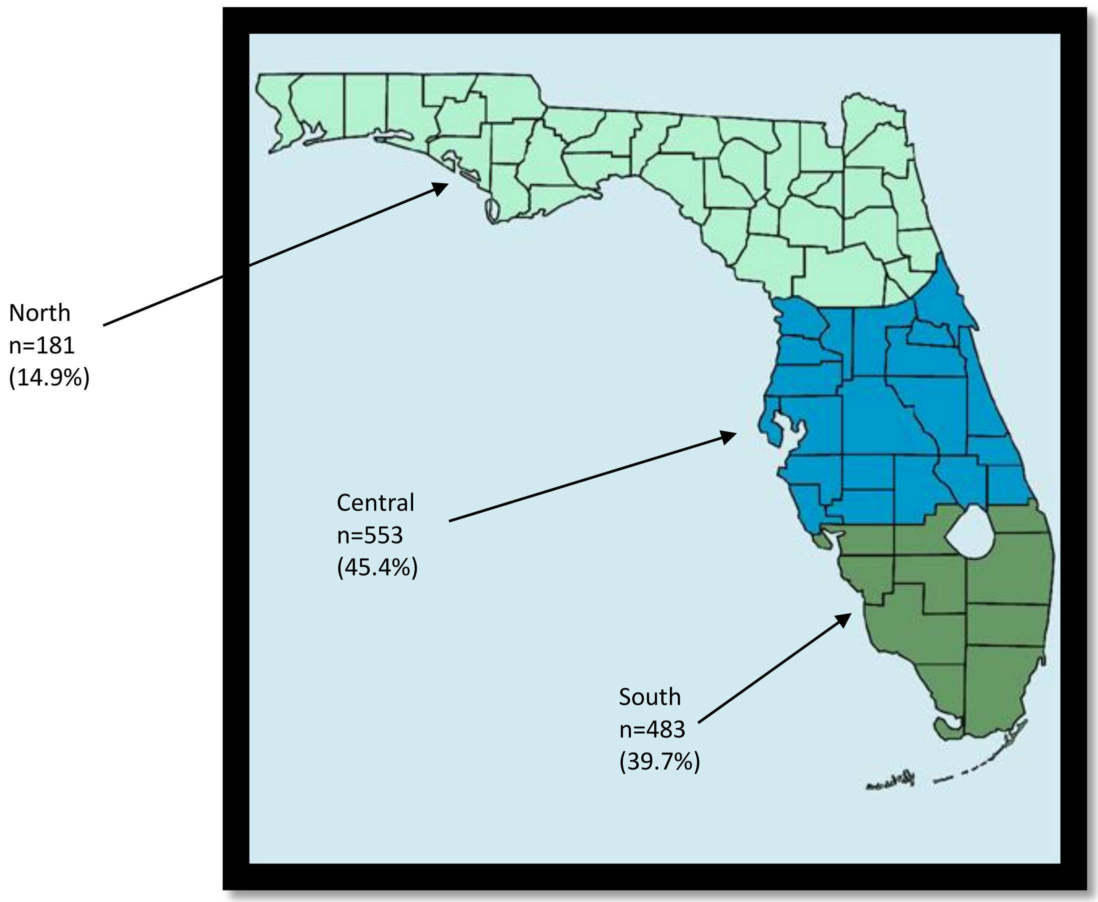


Figure 2: Sample Size by Florida Regions (North, Central, South)



EXECUTIVE SUMMARY

Executive Summary

Eric Friedheim Tourism Institute conducted this study on gaming preferences to gauge the sentiments, perceptions, and intentions toward current and potential changes in gaming opportunities in the State of Florida and its impact on the tourism industry. In this nationally representative study, respondents were asked to provide their opinions on preferences toward gambling in general and, specifically, expanded gambling in the State of Florida. They also reflected on their perceptions of Florida given the presence or absence of gambling venues, as well as their likelihood of traveling to and participating in expanded activities in Florida.

The study was fielded during the month of August, 2013, and data were collected from 2,436 respondents. Results compare Florida residents with Non-Florida residents, and each of the three designated regions of Florida (North, Central, and South) with each other.

Key Findings

Visitation to Florida

- Nearly four-in-ten (41%) non-Florida residents have visited Florida during the past two years, while roughly six-in-ten (59%) have not visited Florida during the past two years.
- The majority (51%) of non-Florida residents were extremely/somewhat interested in visiting Florida during the next year. Florida is most viewed as a destination that is popular, fun, beautiful, diverse, and interesting. Florida is least viewed as liberal, innovative or open-minded.

Gambling Behavior

- More than eight in ten (84%) of the respondents interviewed have gambled in their lifetime.
    - The majority of both Florida residents (86%) and non-Florida residents (82%) have gambled in their lifetime.
    - Slightly less than half of Florida residents (48%) and non-Florida residents (49%) have gambled during the past 12 months
- Nearly half of respondents (48%) interviewed have gambled at least once during the past 12 months.
    - Of those who gambled during the past year, roughly half of Florida residents (50%) and nearly six in ten non-Florida residents (59%) gambled only a few days during the year.
- Respondents spent an average of $532 a year on gambling.
- Of those who have gambled during the past 12 months, the largest proportion of respondents interviewed play the lottery (88%), followed by gambling in a casino (77%).
    - Among those who gamble, more than nine in ten (92%) of Florida residents and eight in ten (84%) of non-Florida residents play the lottery. The next most popular type of gambling is gambling in a casino with three quarters (76%) of Floridians and eight in ten (81%) non-Florida residents participating.
    - Slot machines are the most popular game for both Florida residents (77%) and non-Florida residents (78%) who have gambled during the past year. Roughly four in ten (41%) of respondents played card games such as blackjack or poker, while one in five (22%) played other table games such as roulette or craps.
- Both Florida residents and non-Florida residents engage in gambling for the chance of winning money or prizes (35% and 33% respectively).
- Two thirds of Florida residents (67%) and non-Florida residents (65%) state the largest contributing factor for not participating in gambling is that they have other things that they would rather spend their money on. These numbers were also consistent among those residing in the three Florida geographic regions (north, central and south Florida).

Attitudes toward Gambling

- More than four in ten respondents are neutral toward gambling in general (neither support nor oppose). One in three (32%) supports gambling and roughly one in ten (11%) supports gambling but does not participate or opposes gambling (8%) in general.
  - South Florida residents were more likely to oppose gambling (8%) than their Central Florida counterparts (7%).
- Half of respondents interviewed (53%) cite moral grounds as the main reason for note participating in gambling, while slightly fewer (46%) cite religious reasons. Roughly one-third cites concerns about lost productivity (36%) or crime (35%) as reasons for not participating in gambling.
  - South Florida residents are significantly more likely than their North Florida counterparts to cite concerns of crime for reasons not to gamble (40% vs. 25%).

Casino Gambling in Florida

- Nearly four in ten (37%) of respondents who indicated they have gambled, have gambled in Florida at least once during their lifetime.
  - More than half (55%) of respondents who indicated they have gambled in Florida, have gambled in Florida during the past 12 months (other than the lottery).
- More than half of respondents interviewed indicated they are not at all likely/ unlikely to gamble in Florida in the future, while one-quarter (26%) indicate they are extremely likely/ likely to gamble in Florida in the future.
  - Non-Florida residents were significantly more likely to state that they would gamble in Florida in the future (46%) than Florida residents (23%).
  - Roughly, seven in ten (68%) of respondents who are extremely likely/likely to gamble in Florida in the future are likely to play the lottery, while approximately two-thirds (68%) are likely to gamble at an Indian Casino. One in five is likely to gamble at a pari-mutuel facility – horse racetrack (21%) or dog racetrack (18%).
  - For respondents who indicated they have gambled in Florida during the past year, they gambled approximately $475.02 on gambling in Florida during that period.

Sentiments toward Gambling in Florida

- More than four in ten (42%) of respondents interviewed are neutral toward expanding gambling opportunities in Florida, while (40%) supports/supports but will not participate expanded gambling in the State. Approximately, one in ten (11%) opposes the expansion of gambling in the State.
  - Nearly half of the non-Florida residents (48%) and four in ten Florida residents are neutral towards expanding gambling in the state of Florida.
- Depending on the type of gambling, between four in ten and six in ten respondents have no opinion towards the expansion, restriction or reduction of gambling in Florida.
  - Roughly four in ten Florida residents would like to see expanded casino gambling at commercial resorts (41%) casino gambling at tribal facilities (33%) and the lottery (37%) as compared to approximately one in ten who would like to see it restricted or reduced.
- The majority of Florida residents (67%) and non-Florida residents (78%) are less likely to be in favor of expanding gambling in Florida if additional restrictions or limits were placed on gambling in the State.
  - A larger portion of South Florida residents (82%) than those in Central Florida (62%) and North Florida (52%) would be less likely to be in favor of expanded gambling in Florida if additional restrictions were put on gambling in the State.

Impact of Expanded Gambling on Florida's Tourism Industry

- One-third of respondents believe that the gambling industry is an extremely important/very important contributor to the overall travel and tourism industry.

- More than three-quarters of non-Florida residents (78%) are not likely to change their visitation intentions to Florida if gambling opportunities were expanded.
    - More than eight in ten (83%) non-Florida residents would visit Florida the same amount if gambling opportunities were reduced.
    - Roughly half (54%) of non-visitors to Florida who have not visited Florida during the past 24 months indicated they would not come to Florida if gambling opportunities were expanded.
- Approximately 15% of visitors said they would stay longer if gambling opportunities were expanded. The average extension was two days.
- One in five Florida residents would spend more on travel if gambling opportunities were reduced in Florida.
- Roughly one in six Florida residents in each region believe that reducing gambling in Florida would have a more favorable outcome for the state of Florida (range 13% to 16%)
    - Florida residents are significantly more likely to believe that gambling offers the benefits of creating more jobs in the state or community (69% vs. 53%).
    - Across the three regions, a larger portion of residents believe that gambling offers Florida the most benefits in terms of creating more jobs in the state or community.

Preferred Gambling Regulations

- Nearly six in ten respondents believe that the State should regulate gambling at Internet sweepstakes cafes, arcades and truck stops.
    - More than two-thirds of Florida residents across all regions believe the State should tax gambling at internet sweepstakes cafes, arcades and truck stops.
    - Respondents residing in Central and South Florida are significantly more likely than their North Florida counterparts to believe the State should regulate gambling in internet sweepstakes, arcades and truck stops.
- Approximately one in three respondents believes that the State should prohibit gambling at Internet sweepstakes cafes, arcades and truck stops.
- More than six in ten of respondents interviewed believe the State should tax gambling at Internet sweepstakes cafes, arcades and truck stops.
- Slightly less than one in five (19%) respondents is in favor of reducing the number of slot machines at Pari-mutuel facilities in Florida.
    - Non-Florida residents are (54%) significantly more likely than Florida residents (36%) to be unsure of whether they are in favor of the State of Florida authorizing Pari-mutuel facilities in Florida to conduct table games
- One-third of respondents interviewed (34%) is in favor of the State authorizing Pari-mutuel facilities in Florida to conduct table games.
    - Central Florida (43%) and South Florida (43%) residents are significantly more likely to be in favor of the state of Florida authorizing pari-mutuel facilities in Florida to conduct table games.
- Approximately one-third of Florida residents and one-quarter of non-Florida residents believe that there should be no change to each type of Pari-mutuel facility in Florida (e.g., thoroughbred horse racing, harness racing, quarter horse racing, and greyhound racing).

Impact of Expanded Destination Casino Gambling in Florida

- Nearly half of respondents interviewed (48%) believe that Florida should authorize new destination casino resorts. Roughly one-third does not know/is not sure.
    - More than four in ten (44%) believe that the State should authorize between 2-3 new destination casino resorts.

- More than half of respondents interviewed (56%) believe that expanded gambling would be beneficial to Florida, while one in three (32%) are in favor of bringing a large-scale destination casino resort to their town.
    - More than four-in-ten Florida residents (46%) and six in ten (63%) non-Florida residents believe that expanded gambling would be beneficial to Florida, while one in three (31%) are in favor of bringing large-scale destination casino resorts to their town.
    - One-in-five Florida residents is either not in favor of bringing large-scale destination casino resorts to their town or is in favor of bringing large-scale destination casino resorts to Florida, but don't want one in their city or town.

CORE QUESTIONS

Florida Resident Sample

The majority of the Florida resident sample lives in Central Florida (45%), followed by South Florida (40%) and North Florida (15%).

Table 1:
Do you live in North, Central or South Florida?

	Florida Residents % (n=1223)
North	14.9
Central	45.4
South	39.7

Of all Florida respondents (n=1223)

Non-Florida Resident Sample

The non-Florida resident sample is comprised of approximately one-quarter each from the West (23%), Midwest (29%), Northeast (23%), and Southern (24%) regions of the U.S., as defined by the U.S. Census.

Table 2:
What is your zip code?

	Non-Florida Residents % (n=1213)
West	23.0
Midwest	28.9
Northeast	22.8
South	23.8
Hawaii & Alaska	1.4

Of all Non-Florida respondents (n=1213)

Visitation to Florida

Nearly four-in-ten (41%) non-Florida residents have visited Florida during the past two years, while roughly six-in-ten (59%) have not visited Florida during the past two years.

Table 3:
Have you visited Florida during the past two years?

	Non-Florida Residents (n=1213)
Yes	40.8
No	58.8
Don't know	3.0
Refuse	1.0

Of all non-Florida respondents (n=1213)

Likelihood of Visiting Florida

The majority (51%) of non-Florida residents were extremely/somewhat interested in visiting Florida during the next year.

Table 4:
How interested are you in visiting Florida during the next year?

	Non-Florida Residents (n=1213)
Not at all interested	15.6
Somewhat not interested	10.0
Neutral	23.3
Somewhat interested	22.2
Extremely interested	28.9

Of all non-Florida respondents (n=1213)

Living Distance from a Gambling Facility

The distance that respondents live from a gambling facility is similar between Florida residents and non-Florida residents. More than one-third of the Florida residents (36%) and three-in-ten non-Florida residents (31%) live about 1 hour away from a gambling facility. Slightly more non-residents live more than 2 hours away from a gambling facility (23% vs. 12%, respectively).

Table 5:
How far do you live from a gambling facility?

	Florida Residents % (n=1223)	**Non-Florida Residents % (n=1213)**
10 minutes or less	9.8	7.8
10 minutes to ½ hour	28.5	24.2
About 1 hour	36.4	30.8
2 hours	13.7	14.2
More than 2 hours away	11.6	23.0

Of all respondents (n=2436)

Image of Florida as a Destination

Florida is viewed in a positive light by residents and non-residents. Of the nineteen attributes, Florida respondents significantly regard Florida with more positive attitudes than non-Florida residents on 13 attributes. Florida residents perceive several of Florida's images more positively than their counterparts on such images as "popularity" (82% vs. 76%), "fun" (80% vs. 74%), "beautiful scenery" (77% vs. 69%), "diverse" (69% vs. 58%), "interesting" (67% vs. 60%), "clean" (52% vs. 39%), "health and wellness focused" (46% vs. 34%), "affordable" (44% vs. 29%), "slow paced life"(43% vs. 36%), "independent" (36% vs. 28%), "conservative" (36% vs. 31%), "open-minded" (31% vs. 27%), and "innovative" (30% vs. 26%).

Non-Florida residents are significantly more likely than Florida residents to think of Florida as being "crowded" (54% vs. 49%).

Table 6:
How well do each of the following attributes describe Florida?*

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
1. Popular	79.3	82.3[a]	76.4
2. Fun	76.7	79.5[a]	73.8
3. Beautiful scenery	72.6	76.7[a]	68.7
4. Diverse	63.4	68.8[a]	58.1
5. Interesting	63.4	66.9[a]	60.0
6. Family-oriented	55.0	54.0	56.0
7. Friendly	50.9	52.2	49.7
8. Clean	45.4	51.6[a]	39.0
9. Crowded	51.6	49.1	54.2[a]
10. Health and wellness-focused	39.7	46.0[a]	33.5
11. Affordable	36.8	44.2[a]	29.4
12. Slow-paced lifestyle	39.4	42.5[a]	36.3
13. Hip, cool, contemporary	38.6	40.1	37.2
14. Safe	37.0	38.0	36.1
15. Independent	31.7	35.9[a]	27.5
16. Conservative	33.5	35.6[a]	31.3
17. Open-minded	28.8	30.7[a]	26.9
18. Innovative	28.0	29.8[a]	26.3
19. Liberal	19.9	19.5	20.1

Of all respondents (n=2436)

**Top-two box score based on a 5-pt scale where 1 equals "does not describe at all" and 5 equals "describes extremely well".*
a – Denotes a significant difference between Florida residents and non-Florida residents

GAMBLING PARTICIPATION AND PREFERENCES

Past Gambling Behavior - Lifetime

More than eight in ten respondents interviewed have gambled during their lifetime.

Overall, for Florida residents and non-Florida residents alike, the majority are more likely to have gambled than not. More than eight-in-ten Florida residents and non-Florida residents have gambled at least once during their lifetime (86% vs. 82%, respectively).

Table 7:
Have you ever gambled in your lifetime?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	84.1	85.8	82.4
No	14.9	13.0	16.9

Of all respondents (n=2436)
**Does not equal 100% due to non-response and don't know*

Past Gambling Behavior – Florida Residents by Region Lifetime

A closer look reveals consistent gambling behavior within the regions of the State of Florida. More than eight-in-ten residents of North (83%), Central (87%), and South (86%) Florida residents have gambled in their lifetime.

Table 8:
Have you ever gambled in your lifetime?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=489)
Yes	83.4	86.8	85.5
No	14.9	12.1	13.3

Of all Florida respondents (n=1223)

Past Gambling Behavior – Past Year

Half of respondents surveyed have gambled during the past 12 months.

Slightly less than half of Florida residents (48%) and non-Florida residents (49%) have gambled during the past year.

Table 9:
Have you gambled during the past 12 months?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	48.4	48.2	48.6
No	50.2	50.4	50.1

Of all respondents (n=2436)

**Does not equal 100% due to non-response and don't know*

Past Gambling Behavior – Florida Residents by Region Past Year

The breakdown of gambling during the past 12 months by region of Florida reveals no statistical differences between those who live in the three different regions. Slightly more South (50%) and Central Florida residents (49%) have gambled during the past year than their North Florida counterparts (43%).

Table 10:
Have you gambled during the past 12 months?
(n=590)

	North Florida Residents % (n=78)	Central Florida Residents % (n=268)	South Florida Residents % (n=239)
Yes	43.1	48.5	49.5
No	54.1	50.1	49.5

Of all Florida respondents who responded to the question (n=585)

**sample size accounts for non-respondents*

Frequency of Past Year Gambling

The majority of the respondents interviewed (55%) gamble a few days all year.

Of those who gambled during the past 12 months, roughly half of Florida residents (50%) and nearly six-in-ten non-Florida residents (59%) gambled only a few days during the year, while one-quarter of residents (24%) and one-in-five non-Florida residents gambled once a month or less. Roughly one-in-seven Florida residents (16%) and non-residents (15%) gambled several times per month. A very small percentage of Florida and non-Florida residents gambled daily (2% vs. 1%, respectively).

Table 11:
How often have you gambled during the past 12 months?

	Total Sample % (n=1180)	**Florida Residents % (n=590)**	**Non-Florida Residents % (n=590)**
Only a few days all year (1-5 times per year)	54.4	50.1	58.7
Once a month or less (6-12 times per year)	21.9	24.3	19.5
Several times a month (3-5 times per month)	15.6	16.1	15.1
Several times a week (6-29 times per month)	5.8	6.8	4.9
Daily (30+ times per month)	1.4	1.7	1.0
Not at all in the past 12 months (0 times)	0.3	0.5	0.2
Don't know	0.5	0.5	0.5
Refused	0.1	0.0	0.2

**Of those who gambled during the past 12 months (n=1180)*

Spending on Gambling

Florida and non-Florida residents spent an average of $530 per year on gambling ($530 vs. $536, respectively).

Table 12:
How much do you spend on gambling on average during a year?

	Total Sample % (n=1180)*	Florida Residents % (n=590)	Non-Florida Residents % (n=590)
Average dollar amount	$531.90	$530.10	$536.29

**Of those who gambled during the past 12 months (n=1180)*

Types of Gambling Participated In

Of those who gambled, playing the lottery was the most common type of gambling participated in (88%), followed by gambling in a casino (77%). The least common form of gambling was betting on jai alai (8%).

Among those who gamble during the past 12 months, roughly nine-in-ten Florida residents (92%) and eight-in-ten non-Florida residents (84%) play the lottery. Not far behind is participation in casino gambling with three-quarters of Florida residents and eight-in-ten non-Florida residents reporting participation in casino gambling. Roughly one-quarter of all respondents play gaming machines outside a casino, while slightly more non-Florida residents (24%) bet on horse racing than Florida residents (21%).

Non-Florida residents are significantly more likely than Florida residents to gamble in a casino (80% vs. 76%), participate in some form of sports betting (35% vs. 28%) or other gambling activities (25% vs. 20%). Florida residents, on the other hand, are significantly more likely than non-Florida residents to bet on dog racing (13% vs. 6%).

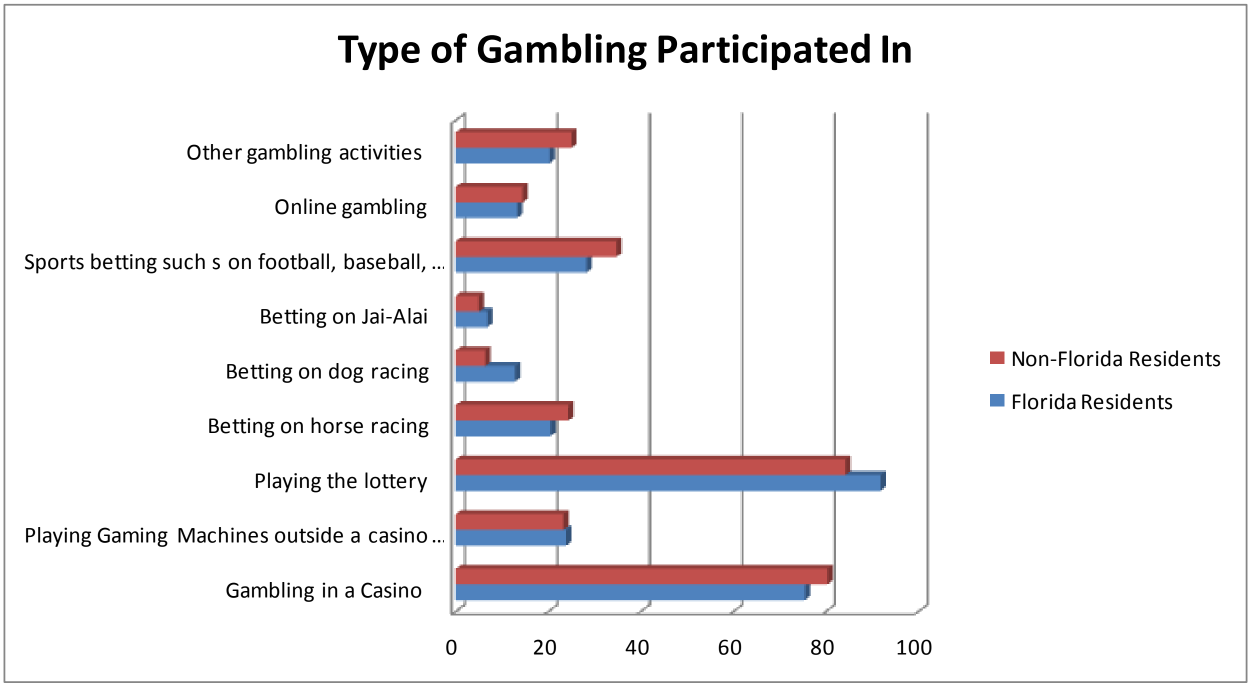
Table 13:
In which types of gambling do you participate?*

	Total Sample % (n=1180)*	Florida Residents % (n=590)	Non-Florida Residents % (n=590)
Playing the lottery	87.8	91.8	84.2
Gambling in a Casino	77.3	75.5	80.4[a]
Sports betting such as on football, baseball, hockey, soccer, etc. (whether legal or not)	30.7	28.3	34.7[a]
Playing Gaming Machines outside a casino such as horse track, dog track, jai-alai, internet sweepstakes café, etc.	23.0	23.9	23.3
Betting on horse racing	21.6	20.5	24.3
Other gambling activities	20.8	20.3	25.0[a]
Online gambling	13.5	13.3	14.5
Betting on dog racing	9.3	12.8[a]	6.4
Betting on Jai-Alai	5.7	6.9	5.0

**Of those who gambled during the past 12 months (n=1180)*

a – Denotes a significant difference between Florida residents and non-Florida residents

Figure 3: Type of Gambling Participated in by Place of Residence



**Among those who gamble. Does not equal 100%. Multiple responses allowed.*

Preferred Games

Slot machines are the most played type of casino gambling (77%) among respondents who have gambled during the past 12 months.

More than three-quarters of Florida and non-Florida residents play slot machines, roughly four-in-ten play card games, and one-in-five play table games or video games such as video poker.

Non- Florida residents are more likely to play Keno type games (9%) than Florida residents (5%).

Table 14: What games do you usually play?

	Total Sample % (n=1180)*	Florida Residents % (n=590)	Non-Florida Residents % (n=590)
Slot machines	77.4	77.1	77.7
Card games such as blackjack or poker	40.7	42.1	39.3
Other table games, such as roulette or craps	21.7	22.2	21.2
Other video games, such as video poker	18.6	17.0	20.1
Bingo	9.9	8.5	11.3
Sports betting	9.4	8.1	10.7
Keno-type games	7.1	5.3	9.0[a]
Horse or dog race betting	4.9	5.1	4.7
Pull tabs	4.7	4.8	4.8
Don't know	2.0	2.5	1.5
Refused	1.4	1.9	1.0
Other (specify)	1.8	1.7	1.9

**Of those who gambled during the past 12 months (n=1180)*
a – Denotes a significant difference with Florida residents and Non-Residents

Reasons to Engage in Gambling

Respondents gamble for a variety of reasons. Regardless of where they live, approximately one-third of Florida residents (35%) and non-Florida residents (33%) cite the chance of winning money or prizes as reasons why they gamble. One-in-five cite the element of excitement, and roughly one-in-seven state that they gamble to make money or because it's something they do with friends or family.

Roughly one-in-ten like to gamble because of the sense of achievement when they win or because gambling is a hobby or pastime. Interestingly, neither group gambles to impress people (1% and 2%, respectively).

Table 15:
Why do you gamble?

	Total Sample % (n=1180)*	**Florida Residents % (n=590)**	**Non-Florida Residents % (n=590)**
For the chance of winning money or prizes	34.1	34.8	33.3
Because it's exciting	18.8	19.5	18.1
To make money	16.4	16.1	16.8
Because it's something that I do with my friends or family	15.1	15.4	14.7
As a hobby or a pastime	9.2	9.5	9.0
Because of the sense of achievement when I win	9.9	9.2	10.7
To relax	7.5	8.3	6.8
For the mental challenge or to learn about the game or activity	6.9	6.6	7.3
To escape boredom or to fill my time	5.6	5.6	5.6
To be sociable	5.3	4.4	6.3
Because I'm worried about not winning if I don't play	2.3	2.0	2.5
To compete with others (e.g. bookmaker, other gamblers)	2.9	2.0	3.7
Because it helps when I'm feeling tense	2.2	1.7	2.7
To impress other people	1.4	1.4	1.5

Of those who gambled during the past 12 months (n=1180)
** Multiple responses allowed.*

Reasons to Engage in Gambling - Florida Residents by Region

Regardless of where they live, over one-third of residents from North (36%), Central (37%), and South Florida (33%) cite the chance of winning money or prizes as reasons why they gamble, followed by the element of excitement (22% vs. 19$ vs. 19%). Among the remainder of reasons to gamble, there are differences between the regions.

Table 16:
Why do you gamble?*
Florida Residents by Region

	North Florida Residents % (n=78)	Central Florida Residents % (n=268)	South Florida Residents % (n=239)
For the chance of winning money or prizes	35.9	36.9	32.6
Because it's exciting	21.8	19.0	19.2
Because it's something that I do with my friends or family	17.9	18.3	11.7
To make money	16.7	16.8	15.5
To relax	10.3	10.4	5.4
As a hobby or a pastime	9.0	9.0	10.0
Because of the sense of achievement when I win	9.0	10.8	7.5
For the mental challenge or to learn about the game or activity	9.0	9.0	2.9
To escape boredom or to fill my time	9.0	6.0	3.8
Because I'm worried about not winning if I don't play	5.1	2.6	0.4
To be sociable	3.8	4.9	4.2
To compete with others (e.g. bookmaker, other gamblers)	3.8	3.0	0.4
Because it helps when I'm feeling tense	3.8	1.9	0.8
To impress other people	2.6	1.1	1.3

Of Florida residents who responded to the question (n=585)
** Multiple responses allowed.*

Reasons for Not Participating in Gambling

Two-thirds of Florida residents (67%) and non-Florida residents (65%) state the largest contributing factor for not participating in gambling is that they have other things that they would rather spend their money on. In addition, Non-Florida residents are significantly more likely to state that they are not interested (44% vs. 38%) or live too far away (14% vs. 10%) from gambling to participate.

Table 17: Why do you not participate in gambling?*

	Total Sample % (n=1224)*	Florida Residents % (n=616)	Non-Florida Residents % (n=608)
Have other things that I would rather spend my money on	65.9	66.9	64.9
Not interested	40.8	38.0	43.7[a]
Have other things that I would rather spend my time on	36.2	35.1	37.4
Live too far away	12.2	10.4	14.0[a]
Religious reasons	8.8	8.3	9.4
Moral grounds	8.7	7.8	9.7
Inconvenient	7.6	7.5	7.7

**Of those who have not gambled during the past 12 months (n=1224)*

Reasons for Not Participating in Gambling – Florida Residents by Region

A slightly higher proportion of South Florida residents (70%) than Central (65%) or North Florida residents (64%) cite that they do not participate in gambling because they have other things that they would rather spend their money on, while more North Florida residents (45%) state that they are just not interested than residents in Central (35%) and South Florida (29%) residents.

Table 18: Why do you not participate in gambling?* Florida Residents by Region

	North Florida Residents % (n=92)	Central Florida Residents % (n=278)	South Florida Residents % (n=243)
Have other things that I would rather spend my money on	64.3	65.0	69.9
Not interested	44.9	35.0	28.5
Have other things that I would rather spend my time on	37.8	31.4	38.1
Live too far away	10.2	10.8	10.0
Religious reasons	8.2	7.2	9.6
Moral grounds	8.2	7.2	8.4
Inconvenient	6.1	8.7	6.3

Of all Florida residents who have not gambled during the past 12 months (n=616)

SENTIMENTS REGARDING GAMBLING

Attitudes towards Gambling

More than four-in-five Florida (47%) and non-Florida (47%) residents are neutral toward gambling in general, while approximately one-third supports gambling (32% vs. 31%, respectively). Florida residents are significantly more likely than non-Florida residents to support gambling but not participate (11% vs. 10%), while non-Florida residents (8%) are significantly more likely to oppose gambling than Florida residents (8%).

d
Table 19:
How do you feel about gambling in general?

	Total Sample % (n=2439)	Florida Residents % (n=1224)	Non-Florida Residents % (n=1213)
Neutral- neither support or oppose	46.9	46.5	47.4
I support gambling	31.6	32.1	31.0
I support gambling but do not participate	10.5	11.2[a]	9.9
I oppose gambling	8.0	7.7	8.3[a]
No opinion	3.0	2.5	3.5

Of all respondents (n=2439)
a – Denotes significant difference from Florida residents

Attitudes towards Gambling – Florida Residents by Region

Significant differences in attitudes towards gambling were found among Florida residents from different regions. South Florida residents (8%) were more likely than their Central Florida counterparts (7%) to oppose gambling.

Table 20:
How do you feel about gambling in general?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=490)
Neutral- neither support or oppose	53.0[b]	45.0	45.8
I support gambling	27.6[c]	32.4	33.7
I support gambling but do not participate	11.0	12.3	10.1
I oppose gambling	6.6	7.2	8.3[a]
No opinion	1.7	3.1[d]	2.1

Of all Florida residents (n=1224)

a- Denotes a significant difference from residents from South Florida and Central Florida

b – Denotes a significant difference from residents of North Florida and the other two regions
c – Denotes a significant difference from residents of North Florida and the other two regions

d-Denotes a significant difference from residents of Central Florida and North Florida

Reasons for Not Participating in Gambling

More than half of respondents who indicated that they have not gambled during the past 12 months, state they do not participate in gambling due to moral grounds, while slightly fewer (48%, 45%) cite religious reasons.. Florida residents are significantly more likely than non-Florida residents to cite concerns over crime (40% vs. 32%) and lost productivity (38% vs. 34%) as reasons for not gambling. Non-Florida residents are significantly more likely than their Florida counterparts to cite personal reasons for not gambling (36% vs. 20%).

Table 21:
Why don't you participate in gambling?

	Total Sample % (n=1224)*	**Florida Residents % (n=616)**	**Non-Florida Residents % (n=608)**
Moral grounds	52.8	51.1	54.5
Religious reasons	46.2	47.9	44.6
Crime	35.4	39.4[a]	31.7
Lost productivity	35.9	38.3[a]	33.7
Problem gambling	30.8	27.7	33.7
Personal reasons	28.2	20.2	35.6[a]
Am not at all opposed to having casinos	2.1	1.1	3.0

**Of those who have not gambled during the past 12 months (n=1224)*

**Does not equal 100%. Multiple responses allowed*

a – Denotes significant difference between Florida residents and non-Florida residents

Reasons for Not Participating in Gambling - Florida Residents by Region

Nearly six-in-ten South Florida residents (58%) do not participate in gambling for moral reasons and a similar proportion of North Florida residents (58%) cite religious reasons for not gambling. Roughly half of South Florida residents cite concerns related to crime and lost productivity as reasons not to gamble. South Florida residents are significantly more likely than their North Florida counterparts to cite concerns related to problem gambling as reasons not to gamble (40% vs. 25%).

Table 22:
Why don't you participate in gambling?
Florida Residents by Region

	North Florida Residents % (n=92)	Central Florida Residents % (n=278)	South Florida Residents % (n=243)
Moral grounds	50.0	47.5	57.5
Religious reasons	58.3	52.5	42.5
Crime	25.0	30.0	50.0
Lost productivity	25.0	32.5	47.5
Problem gambling	25.0	15.0	40.0[b]
Personal reasons	8.3	27.5	17.5
Am not at all opposed to having casinos	8.3	0.0	0.0

Of Florida residents who have not gambled during the past 12 months (n=616)

**Does not equal 100%. Multiple responses allowed*
a - Denotes significant difference between North and Central Florida residents
b- Denotes significant differences between North and South Florida residents
c- Denotes significant differences between Central and South Florida residents

CASINO GAMBLING IN FLORIDA

Gambling in Florida

Approximately, four in ten (37%) of respondents who indicated they have gambled, have gambled in Florida at least once in their lifetime.

Florida residents are significantly more likely than non-Florida residents to have gambled in the State of Florida during their lifetime (60% vs. 13%).

Table 23:
Have you ever gambled in Florida (other than the lottery)?

	Total Sample % (n=2048)*	Florida Residents % (n=1049)	Non-Florida Residents % (n=999)
Yes	37.1	60.4[a]	12.6
No	62.3	38.9	86.7[a]

**Of those who have gambled (n=2048)*
a – Denotes significant difference from Florida residents and non-residents

Gambling in Florida – Florida Residents by Region

More than six-in-ten South (63%) and Central (61%) Florida residents have gambled in Florida, while slightly more than half of North (52%) Florida residents have.

Table 24:
Have you ever gambled in Florida (other than the lottery)?
Florida Residents by Region

	North Florida Residents % (n=151)	Central Florida Residents % (n=480)	South Florida Residents % (n=418)
Yes	52.3	61.3	62.5
No	47.7	37.9	36.8

Of Florida residents who have gambled (n=1049)

Past Year Gambling in Florida

More than half (55%) of respondents who indicated they have gambled in Florida, have gambled in Florida during the past 12 months (other than the lottery).

Florida residents are significantly more likely than their non-Florida counterparts to have gambled in Florida (other than the lottery) during the past 12 months (58% vs. 40%).

Table 25:
Have you gambled in Florida during the past 12 months (other than Lottery)?

	Total Sample % (n=892)*	Florida Residents % (n=739)	Non-Florida Residents % (n=153)
Yes	55.1	58.2[a]	39.7
No	44.2	41.2	59.5[a]

Of those who have gambled in Florida (n=892)
a – Denotes significant difference from Florida residents and non-Florida residents

Past Year Gambling in Florida – Florida Residents by Region

South Florida residents are significantly more likely to have gambled (other than the lottery) in Florida during the past 12 months than **North** Florida residents (59% vs. **54%** respectively).

Table 26:
Have you gambled in Florida in the past 12 months (other than lottery)?
Florida Residents by Region

	North Florida Residents % (n=187)	Central Florida Residents % (n=294)	South Florida Residents % (n=258)
Yes	54.4	58.2	59.3[a]
No	41.8	41.5	40.7[b]

Of Florida residents who gambled in Florida (n=739)

a – Denotes a significant difference from residents of South Florida and North Florida

b- Denotes a significant difference from residents of South Florida and the other two regions

Gambler Experience with Florida Gambling Venues

More than one third of the respondents interviewed who have gambled in Florida, have gambled at the Seminole Hard Rock Hotel & Casino-Tampa.

More than four-in-ten Florida residents (41%) and three-in-ten non-Florida residents (29%) who have gambled in Florida, have gambled at the Seminole Hard Rock Hotel & Casino in Tampa, while approximately one-quarter has gambled at the Seminole Hard Rock Hotel and Casino in Hollywood. Approximately one-in-ten have gambled at the Seminole Casino Coconut Creek.

Non-Florida residents are significantly more likely than their Florida counterparts to have gambled at the Tampa Bay Downs (12% vs. 7%), Seminole Casino Immokalee (10% vs. 5%), Calder Casino/Tropical Park (8% vs. 4%), Daytona Beach Kennel Club/West Volusia (7% vs. 3%), Orlando Jai Alai (8% vs. 2%), Flagler Dog Track & Magic City Casino (6% vs. 2%), Seminole Casino Brighton (5% vs. 1%), Bestbet Jacksonville (3% vs. 1%), and Seminole Casino Big Cypress (5% vs. 1%). Florida residents, on the other hand, were significantly more likely to have gambled at Seminole Hard Rock Hotel & Casino in Tampa (41% vs. 29%).

Table 27:
Where in Florida have you gambled?

	Total Sample Yes % (n=892)*	Florida Residents Yes % (n=739)	Non-Florida Residents Yes % (n=153)
Seminole Hard Rock Hotel & Casino- Tampa	39.2	41.2[a]	29.3
Seminole Hard Rock Hotel & Casino- Hollywood	26.4	26.8	24.6
Seminole Casino Coconut Creek	11.3	11.7	9.5
Seminole Casino Hollywood	10.9	10.6	12.7
Casino Style Gaming Centers (e.g. internet/sweepstakes cafe)	3.9	10.6	5.6
Gulfstream Park	10.1	9.5	13.5
Tampa Bay Downs	7.8	6.9	11.9[a]
Miccosukee Resort & Gaming	6.6	6.5	7.1
The Isle at Pompano Park	5.5	5.7	4.8
Seminole Casino Immokalee	5.9	5.2	9.5[a]
Derby Lane	4.1	4.4	2.4
Casino Boats (Day Cruise- Off Shore)	9.7	4.3	2.4
Mardi Gras Casino/Racetrack	4.2	4.1	4.8
Calder Casino/Tropical Park	4.3	3.6	7.9[a]
Daytona Beach Kennel Club/West Volusia	3.8	3.2	7.1[a]
Dania/Summersport Jai Alai	3.6	3.2	5.6
Tampa Greyhound Track	3.8	3.0	7.9
Naples Fort Myers Greyhound	3.0	2.5	5.6
Palm Beach Kennel Club/P B Greyhound	2.8	2.5	4.0
Sarasota Kennel Club	2.9	2.5	4.8
Miami/Summer Jai Alai	2.9	2.2	6.3

Ocala Poker & Jai Alai	2.6	2.2	4.8
Orlando Jai Alai	3.0	2.1	7.9[a]
Flagler Dog Track & Magic City Casino	2.2	1.6	5.6[a]
Melbourne Greyhound Park	1.4	1.4	1.6
Orange Park Kennel Club	1.4	1.4	1.6
Seminole Casino Brighton	1.8	1.3	4.8[a]
Ebro Greyhound Park	1.4	1.3	2.4
Fort Pierce Jai Alai	1.6	1.3	3.2
Sanford Orlando/Penn Sanford	1.4	1.1	3.2
Bestbet Jacksonville	1.3	0.9	3.2[a]
Magic City Jai Alai	1.2	0.9	2.4
Seminole Casino Big Cypress	1.4	0.8	4.8[a]
OBS South Marion	1.1	0.8	2.4
Pensacola Greyhound Track	1.4	0.6	5.6
Jefferson County Kennel Club	0.5	0.5	0.8
St. Johns Greyhound Park	1.2	0.3	5.6
Hamilton Jai Alai	0.4	0.0	2.4

**Of those who have gambled in Florida (n=892)*

**Does not equal 100%. Multiple responses allowed.*

a - Denotes a significant difference from Florida residents and non-Florida residents

Likelihood of Gambling in Florida in the Future

More than half of respondents interviewed indicated they are not at all likely/ unlikely to gamble in Florida in the future, while one-quarter (26%) indicate they are extremely likely/ likely to gamble in Florida in the future.
Florida residents are significantly more likely than their non-Florida counterparts to gamble in Florida in the future with more than one-third of Florida residents (36%) being extremely likely/likely to gamble in the State in the future compared to approximately one-in-seven non-Florida residents (15%). Non-Florida residents are significantly more likely to indicate that it is not at all likely that they will gamble in the State of Florida in the future (46% vs. 23%). Roughly one in five respondents is neutral in their likelihood.

Table 28:
How likely are you to gamble in Florida in the future?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (N=1213)
Not at all likely	34.6	23.1	46.2[a]
Unlikely	17.1	17.9	16.3
Neutral	22.6	23.0	22.2
Likely	12.2	15.4[a]	9.0
Extremely Likely	13.5	20.7[a]	6.3

Entire sample (n=2436)

a - Denotes significant difference between Florida residents and Non-Florida Residents

Likelihood of Gambling in Florida in the Future – Florida Residents by Region

Approximately one-in-three Florida respondents is extremely likely/likely to gamble in Florida in the future. Roughly four-in-ten South (36%) and Central Florida residents (38%) and one-third of North Florida residents (32%) are extremely likely/likely to gamble in Florida in the future.

It is important to note that, conversely, nearly half (48%) of North Florida residents, and four-in-ten South (42%) and Central (38%) Florida residents are not at all likely/unlikely to gamble in Florida in the future. Between one-in-four and one-in-five Florida residents is neutral.

Table 29:
How likely are you to gamble in Florida in the future?
Florida Residents by Region

	North Florida Residents % (n=187)	Central Florida Residents % (n=553)	South Florida Residents % (n=483)
Not at all likely	25.4	21.9	23.4
Unlikely	22.1	16.3	18.4
Neutral	20.4	24.2	22.2
Likely	15.5	15.7	15.1

Extremely Likely	16.6	21.9	20.9

Of all Florida residents (n=1223)

Likelihood of Gambling in Select Florida Gambling Venues

Roughly, seven in ten (68%) of respondents who are extremely likely/likely to gamble in Florida in the future are likely to play the lottery, while approximately two-thirds (68%) are likely to gamble at an Indian Casino. One in five is likely to gamble at a pari-mutuel facility – horse racetrack (21%) or dog racetrack (18%).

Of those who are likely to gamble in Florida in the future, Florida residents are significantly more likely than non-Florida residents to play the lottery in the future (76% vs. 48%), while non-Florida residents are significantly more likely to gamble at gaming parlors in Florida (17% vs. 6%) or Internet/Sweepstakes café (12% vs. 5%).

Table 30:
For those who are likely to gamble in Florida in the future, where are you likely to gamble?

	Total Sample % (n=591)*	Florida Residents % (N=442)	Non-Florida Residents % (N=149)
Lottery in Florida	68.1	76.4[a]	48.4
Indian Casino	67.8	68.7	65.6
Pari-mutuel facility- horse racetrack	21.1	20.9	21.5
Pari-mutuel facility- dog race-track	18.3	18.6	17.7
Other	7.5	8.8	4.3
Pari-mutuel facility- Jai-Alai	8.3	7.9	9.1
Gaming parlors in Florida	9.6	6.3	17.2[a]
Internet/Sweepstakes café	7.2	5.2	11.8[a]

**Top two box score: Of those who are extremely likely/likely to gamble in the future (n=591)*

a - Denotes significant difference between Florida residents and Non-Florida Residents

Likelihood of Gambling in Select Florida Gambling Venues – Florida Residents by Region

Nearly nine-in-ten North Florida residents (88%), three-quarters of Central Florida residents (76%), and seven-in ten-South Florida residents (73%) are likely to gamble in the future by playing the lottery in Florida. Roughly seven-in-ten Florida respondents indicate that they are likely to gamble in the future by playing at an Indian Casino.

A larger proportion of North Florida residents (28%) are likely to gamble in the future at a Pari-mutuel facility dog track than their South and Central Florida counterparts (20% and 15%), while a larger proportion of South Florida residents (24%) are likely to gamble at a Pari-mutuel facility horse track than their Central and North Florida counterparts (19% and 17%).

Table 31:
For those who are likely to gamble in the future, where are you likely to gamble?
Florida Residents by Region

	North Florida Residents % (n=58)	Central Florida Residents % (n=208)	South Florida Residents % (n=176)
Lottery in Florida	87.9	76.0	73.0
Indian Casino	69.0	67.3	70.1
Pari-mutuel facility- horse racetrack	17.2	18.8	24.1
Pari-mutuel facility- dog racetrack	27.6	15.4	19.5
Other	7.9	6.0	3.0
Pari-mutuel facility- Jai-Alai	8.6	6.7	9.2
Gaming parlors in Florida	10.3	5.8	5.7
Internet/Sweepstakes café	8.6	3.8	5.7

Of those who are extremely likely/likely to gamble in Florida in the future (n=442)

a - Denotes significant difference between Florida residents and Non-Florida Residents

Spending on Gambling in the State of Florida

For respondents who indicated they have gambled in Florida during the past year, they gambled approximately $475.02 during that period.

Florida residents spent a significantly larger amount of money on gambling in the State of Florida during the past 12 months than their non-Florida counterparts ($698 vs. $253).

Table 32: How much did you spend on gambling in the State of Florida during the past 12 months?

	Total Sample (n=1180)*	Florida Residents (n=739)	Non-Florida Residents (n=153)
Average dollar amount in last year	$475.02	$698.22[a]	$253.33

**Of those who gambled in Florida during the past year (n=892)*

a - Denotes significant difference between Florida residents and non-Florida residents

Estimated Future Spending on Gambling – This Year as Compared to Last Year

Roughly six in ten of respondents interviewed (61%) expect to spend the same amount on gambling this year as they did in the previous year.

Roughly six in ten Florida residents (60%) and non-Florida residents (61%) interviewed expect to spend the same amount on gambling this year as they did in the previous year.

Table 33: Do you estimate spending the same amount this year in gambling as last year?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	60.7	60.3	61.0
No	13.5	12.6	14.4
Don't know/not sure	24.5	26.1	22.9
Refused	1.4	1.0	1.7

Of all respondents (n=2436)

SENTIMENTS REGARDING GAMBLING IN FLORIDA

Attitudes toward Gambling in General

Roughly half (47%) of respondents interviewed are neutral toward gambling opportunities in general while (11%) supports/supports but will not participate in gambling. Approximately, one in ten (8%) opposes gambling.

Table 34:
How do you feel about gambling opportunities in general?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Neutral- neither support nor oppose	46.9	46.5	47.4
I support gambling	31.6	32.1	31.0
I oppose gambling	8.0	7,7	8.3
I support gambling but will not participate	10.5	11.2	9.9
No opinion	3.0	2.5	3.5

Of all respondents (n=2436)

Attitudes toward Gambling in General – Florida Residents by Region

More than half (53%) are neutral towards the expansion of gambling opportunities within the State. Roughly 28% from each region supports expanding gambling and 7% opposes the expansion of gambling opportunities in the State.

Table 35:
How do you feel about gambling in general?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=489)
Neutral- neither support nor oppose	53.0	45.0	45.8
I support expanding gambling in Florida	27.6	32.4	33.7
I oppose expanding gambling in Florida	6.6	7.2	8.3
I support expanding gambling in Florida but will not participate	11.0	12.3	10.1
No opinion	1.7	3.1	2.1

Of all Florida residents (n=1223)

Attitudes toward Expanded Gambling Opportunities in Florida

More than four in ten (42%) of respondents interviewed are neutral toward expanding gambling opportunities in Florida, while (40%) supports/supports but will not participate expanded gambling in the State. Approximately, one in ten (11%) opposes the expansion of gambling in the State.

Nearly half of non-Florida residents (48%) and four-in-ten Florida residents (37%) are neutral towards expanding gambling opportunities in Florida.

More than one-third of Florida residents (36%) and one-in-five non-Florida residents (21%) support expanding gambling in Florida.

Roughly one-in-seven Florida residents (13%) and less than one-in-ten non-Florida residents (8%) oppose expanded gambling in the State of Florida.

Table 36:
How do you feel about expanding gambling opportunities in Florida?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Neutral- neither support nor oppose	42.4	37.1	47.8
I support expanding gambling in Florida	28.4	36.1	20.6
I oppose expanding gambling in Florida	10.6	13.0	8.2
I support expanding gambling in Florida but will not participate	8.9	10.4	7.3
No opinion	9.7	3.4	16.0

Of all respondents (n=2436)

Attitudes toward Expanded Gambling Opportunities in Florida – Florida Residents by Region

Nearly four-in-ten residents in each of the three Florida regions are neutral towards the expansion of gambling opportunities within the State. Roughly one-third from each region supports expanding gambling and one-in-seven opposes the expansion of gambling opportunities in the State.

Table 37:
How do you feel about expanding gambling opportunities in Florida?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=483)
Neutral- neither support nor oppose	39.2	36.2	37.5
I support expanding gambling in Florida	33.7	37.3	35.8
I oppose expanding gambling in Florida	13.8	13.2	12.2
I support expanding gambling in Florida but will not participate	10.5	10.1	10.8
No opinion	2.8	3.3	3.7

Of all Florida residents (n=1223)

Attitudes toward Reducing Gambling Opportunities in Florida

Roughly half (47%) of respondents interviewed are neutral toward reducing gambling opportunities in Florida, while one in ten (10%) supports/supports but will not participate reducing gambling in the State. Approximately, three in ten (31%) opposes the reduction of gambling in the State.

Nearly half of non-Florida residents (48%) and four-in-ten Florida residents (37%) are neutral towards the reduction of gambling opportunities in Florida.

More than one-third of Florida residents (36%) and one-in-five non-Florida residents (21%) support reducing gambling in Florida.

Roughly one-in-seven Florida residents (13%) and less than one-in-ten non-Florida residents (8%) oppose reducing of gambling in the State of Florida.

Table 38:
How do you feel about reducing gambling opportunities in Florida?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Neutral- neither support nor oppose	47.1	42.4	51.8
I support reducing the opportunities to gamble in Florida	7.1	7.6	6.5
I oppose reducing opportunities for gambling in Florida	31.0	40.7	21.2
I support reducing gambling in Florida but will not participate	3.4	4.3	2.5
No opinion	11.4	4.9	17.9

Of all respondents (n=2436)

Attitudes toward Expanded Gambling in Florida – Florida Residents by Region

Between four in ten and half (41% - 48%) of residents in each of the three Florida regions are neutral towards the reduction of gambling opportunities within the State. Roughly one in ten (7%) from each region supports reducing gambling and almost four in ten (40%) opposes the reduction of gambling opportunities in the State.

Table 39:
How do you feel about reducing gambling opportunities in Florida?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=489)
Neutral- neither support nor oppose	48.1	41.8	41.2
I support reducing the opportunities to gamble in Florida	7.2	7.1	8.3
I oppose reducing opportunities for gambling in Florida	37.6	40.9	41.6
I support reducing gambling in Florida but will not participate	4.4	4.5	4.1
No opinion	2.8	5.8	4.8

Of all Florida residents (n=1223)

Attitudes towards the Expansion, Restriction or Reduction of Type of Gambling in Florida

Depending on the type of gambling, between four-in-ten and six-in-ten respondents have no opinion towards the expansion, restriction, or reduction of gambling in Florida (range 45% to 58%).

In nearly every type of gambling indicated, a slightly higher proportion of respondents would like to see gambling expanded (range 11% to 33%) as compared to restricted (range 6% to 13%) or reduced (range 6% to 16%).

Table 40:
Which of the following gambling opportunities would you like to see expanded or restricted or reduced in Florida?
All respondents

	Expanded %	Restricted %	Reduced %	No Opinion %	Don't Know %
Casino Gambling at tribal facilities	26.2	8.0	8.0	50.6	7.2
Casino gambling at commercial resorts	32.6	9.2	6.7	44.6	6.8
Lottery	31.7	5.6	6.4	50.3	6.1
Gambling at internet sweepstakes cafes	11.3	12.8	15.7	51.8	8.5
Casino gambling at Horse Racetracks	18.3	10.1	10.0	54.2	7.4
Casino gambling at dog racetracks	16.6	11.5	12.1	52.2	7.5
Casino Gambling at Jai-alai Frontons	14.9	8.5	6.9	58.1	11.6
Sports Betting	21.0	10.4	8.3	52.7	7.6
Online Gambling	14.0	13.2	13.2	51.9	7.6

Of all respondents (n=2436)

Attitudes towards the Expansion, Restriction, or Reduction of Type of Gambling in Florida – Florida Residents by Region

With the exception of casino gambling at commercial resorts and the lottery, a larger proportion of Florida residents have no opinion towards the expansion, restriction, or reduction of types of gambling opportunities in Florida (range 35% to 53%).

Roughly four-in-ten Florida residents would like to see expanded casino gambling at commercial resorts (41%), casino gambling at tribal facilities (33%), and the lottery (37%) as compared to approximately one-in-ten who would like to see it restricted or reduced.

One-quarter (24%) of Florida residents would like to see the expansion of sports betting, while approximately one-in-five would like to see the expansion of casino gambling at horse racetracks, dog racetracks, and Jai-alai frontons.

Approximately one-in-five Florida residents would like to see the reduction of gambling at Internet sweepstakes cafes (17%), a similar proportion to those who would like to see the restriction of online gambling (16%).

Table 41:
Which of the following gambling opportunities would you like to see expanded or restricted or reduced in Florida?
Florida Residents

	Expanded %	Restricted %	Reduced %	No Opinion %	Don't Know %
Casino Gambling at tribal facilities	33.1	9.2	7.9	44.3	5.4
Casino gambling at commercial resorts	40.8	11.2	7.2	35.9	4.9
Lottery	37.4	6.7	7.5	44.2	4.2
Gambling at internet sweepstakes cafes	13.1	17.3	19.8	43.3	6.6
Casino gambling at Horse Racetracks	21.5	12.7	11.2	48.9	5.7
Casino gambling at dog racetracks	20.8	13.4	12.7	47.4	5.7
Casino Gambling at Jai-alai Frontons	18.8	10.7	7.6	53.4	9.7
Sports Betting	24.1	12.4	9.5	47.6	6.4
Online Gambling	16.1	16.4	15.6	46.1	5.8

Of all Florida respondents (n=1223)

Attitudes towards Expansion, Restriction, or Reduction of Type of Gambling in Florida – Non-Florida Residents

The majority of all non-Florida respondents have no opinion towards the expansion, restriction, or reduction of each type of gambling in Florida (range 54% to 60%).

A larger proportion (one-quarter) of non-Florida respondents would like to see casino gambling at tribal facilities (19%) and commercial resorts (24%), the lottery (26%), sports betting (18%), casino gambling at horse tracks (15%), casino gambling at dog tracks (13%), online gambling (12%), and casino gambling at jai-alai frontons (11%) expanded as compared to restricted or reduced.

A slightly larger proportion of non-Florida residents would like to see gambling at Internet sweepstakes cafes reduced (12%) as compared to expanded (10%) or restricted (8%).

Table 42:
Which of the following gambling opportunities would you like to see expanded or restricted or reduced in Florida?
Non-Florida Residents

	Expanded %	Restricted %	Reduced %	No Opinion %	Don't Know %
Casino Gambling at tribal facilities	19.3	6.7	8.1	56.8	9.0
Casino gambling at commercial resorts	24.3	7.2	6.3	53.4	8.8
Lottery	25.9	4.5	5.3	56.3	8.0
Gambling at internet sweepstakes cafes	9.5	8.2	11.6	60.4	10.4
Casino gambling at Horse Racetracks	15.1	7.6	8.7	59.5	9.0
Casino gambling at dog racetracks	12.5	9.6	11.6	56.9	9.4
Casino Gambling at Jai-alai Frontons	11.3	6.3	6.2	57.8	13.4
Sports Betting	17.8	8.4	7.1	54.7	8.8
Online Gambling	11.9	10.1	10.9	55.5	4.7

Of all non-Florida respondents (n=1213)

Attitudes towards Additional Restrictions or Limits on Gambling in Florida – Florida vs. Non-Florida Residents

The majority of Florida residents (67%) and non-Florida residents (78%) are less likely to be in favor of expanding gambling in Florida if additional restrictions or limits were placed on gambling in the State.

Alternatively, roughly one-in-ten Florida residents (8%) and one-in-twenty (5%) non-Florida residents are likely to favor expanding gambling in Florida if additional restrictions or limits were put on gambling in the State.

Table 43:
If there were additional restrictions or limits were put on gambling in Florida, would you be more likely to favor expanding gambling in Florida?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	6.6	7.5	5.0
No	71.4	67.3	78.0
Don't know/not sure	22.0	25.3	17.0

Of all respondents (n=2436)

Attitudes towards Additional Restrictions or Limits on Gambling in Florida – Florida Residents by Region

A larger proportion of South Florida residents (82%) than those in Central (62%) and North (52%) Florida would be less likely to be in favor of expanded gambling in Florida if additional restrictions or limits were placed on gambling in the State.

Less than one-in-ten Florida residents, regardless of region, would be in favor of expanding gambling in Florida if there were additional restrictions or limits on gambling in the State.

Table 44:
If there were additional restrictions or limits were put on gambling in Florida, would you be more likely to favor expanding gambling in Florida?
Florida Residents by Region

	North Florida Residents % (n=25)	Central Florida Residents % (n=73)	South Florida Residents % (n=59)
Yes*	4.0	9.6	5.1
No	52.0	61.6	81.4
Don't Know/ Not sure	44.0	28.8	13.6

Florida residents who oppose gambling (n=157)

**Note: please interpret with caution as sample sizes are small in regions*

IMPACT OF EXPANDED GAMBLING ON FLORIDA'S TOURISM INDUSTRY

Importance of the Gambling Industry to the Travel and Tourism Industry

More than one-third of respondents interviewed (30%) believe that the gambling industry is an extremely/very important contributor to the overall travel and tourism industry.

More than one-third of Florida residents (41%) believe that the gambling industry is an extremely/very important contributor to the overall travel and tourism industry, as compared to one-in-five non-Florida residents (20%).

Alternatively, more than four-in-ten (43%) non-Florida residents and one-quarter of Florida residents (24%) believe that the gambling industry is not at all/not a very important contributor to the overall travel and tourism industry.

Table 45:
How important do you think the gambling industry is in terms of contribution to the overall travel and tourism industry?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Not at all important	16.4	10.5	22.5
2	16.8	13.6	20.0
3	36.2	34.9	37.5
4	19.4	24.4	14.5
Extremely important	11.2	16.7	5.6

Of all respondents (n=2436).

Likelihood to Visit Florida if Gambling Opportunities are Expanded

More than three-quarters of non-Florida residents (78%) who have visited Florida are not likely to change their visitation intentions to Florida if gambling opportunities are expanded in the State. Slightly more than one-in-ten (12%) would visit more, while less than one-in-twenty (4%) would visit less.

Table 46:
IF Florida expanded gambling opportunities would you come to Florida?

	Non-Florida Residents % (n=497)*
More	12.1
Less	3.8
The Same	78.4
Don't know	5.6

**Of non-Florida residents who have visited Florida during the past 2 years (n=497)*

Likelihood to Visit Florida if Gambling Opportunities are Reduced

More than eight-in-ten (82%) non-Florida residents who have visited Florida would visit Florida the same amount if gambling opportunities were reduced, while a similar proportion would visit more (4%) or less (6%).

Table 47:
IF Florida reduced gambling opportunities would you come to Florida?

	Non-Florida Residents % (n=497)*
More	4.4
Less	6.3
The Same	82.7
Don't know	6.7

**Of non-Florida residents who have visited Florida during the past 2 years (n=497)*

Visitation to Florida if Gambling Opportunities are Expanded – Non Visitors to Florida during the Last 24 Months

Roughly half of the non-Florida residents who have not visited Florida during the last 24 months indicate that they would not come to Florida if gambling opportunities are expanded in the State.

Nearly one-in-four (37%) don't know.

Table 48:
IF Florida expanded gambling opportunities would you then come to Florida?
Non-Visitors to Florida During The Last 24 Months

	Non-Florida Residents % (n=713)
Yes	9.2
No	54.0
Don't Know	36.8

Of the non-Florida residents who have not visited Florida during the last 2 years (n=713)

Visitation to Florida if Gambling Opportunities are Reduced – Non Visitors to Florida during the Last 24 Months

Approximately one-half (49%) of the non-Florida residents who have not visited Florida during the last 24 months indicate that they would not come to Florida if there were reduced gambling opportunities in the State.

Nearly four-in-ten (39%) don't know.

Table 49:
IF Florida reduced gambling opportunities would you come to Florida?
Non-Visitors to Florida During The Last 24 months

	Non-Florida Residents **%** **(n=713)**
Yes	11.7
No	49.4
Don't Know	38.9

Of those who are non-visitors to Florida (n=713)

Likelihood to Visit Florida if Gambling Opportunities are Restricted – Non Visitors to Florida during the Last 12 Months

Roughly one-half (49%) of non-Florida residents who have not visited Florida during the last 24 months indicate that they would not come to Florida if gambling opportunities were restricted in the State.

Nearly four-in-ten (39%) don't know.

Table 50:
IF Florida restricted gambling opportunities would you come to Florida?
Non-Visitors to Florida During The Last 12 Months

	Non-Florida Residents % (n=713)
Yes	11.7
No	49.4
Don't Know	38.9

Of the non-Florida residents who have not visited Florida during the last 2 years (n=713)

Likelihood to Stay Longer in Florida if Gambling Opportunities are Expanded – Non Visitors to Florida during the Past 2 Years

Approximately one-in-six (15%) of non-Florida residents would stay for a longer period of time in Florida if gambling were expanded in the state, while six in ten would not stay longer (62%).

Roughly one-quarter (23%) don't know.

Table 51:
If Gambling were expanded in the State of Florida, would you choose to stay in Florida for a longer period of time?
Non-Florida Residents

	Non-Florida Residents % (n=497)*
Yes	14.9
No	61.7
Don't Know	23.4

Of the non-Florida residents who have visited Florida during the past 2 years (n=497)

Likelihood to Stay Longer in Florida if Gambling Opportunities are Reduced – – Non Visitors to Florida during the Past 2 Years

Approximately one-in-twenty (3%) non-Florida residents would stay for a longer period of time in Florida if gambling were reduced in the State.

Slightly more than two-in-ten (22%) don't know.

Table 52:
If Gambling were reduced in the State of Florida, would you choose to stay in Florida for a longer period of time?
Non-Florida Residents

	Non-Florida Residents % (n=497)*
Yes	3.2
No	74.4
Don't Know	22.4

Of the non-Florida residents who have visited Florida during the past 2 years (n=497)

Likelihood to Gamble in the State of Florida if Gambling Opportunities are Expanded – Florida Residents

Nearly half of Florida residents (48%) are likely to gamble in the State rather than take a trip outside the State if gambling were expanded in Florida.

One-third of Florida residents (35%) are not likely and less than one-in-five (18%) don't know.

Table 53:
If Gambling were expanded in the State of Florida, would you be more likely to gamble in the State rather than take a trip outside the State?
Florida Residents

	Non-Florida Residents % (n=497)*
Yes	47.6
No	34.6
Don't Know	17.8

Of all Florida respondents (n=1223)

Likelihood to Gamble in the State of Florida if Gambling Opportunities are Reduced – Florida Residents

Half of Florida residents (51%) are not likely to gamble in the State rather than take a trip outside the State if gambling were reduced in Florida.

One-in-three Florida residents (29%) are likely and one-in-five (20%) don't know.

Table 54:
If Gambling was reduced in the State of Florida, would you be more likely to gamble out of the State rather than gamble in the State?
Florida Residents

	Non-Florida Residents % (n=497)*
Yes	28.6
No	51.1
Don't Know	20.3

Of all Florida respondents (n=1223)

Expected Impact of Spending on Entertainment Spending if Gambling is Reduced in the State – Florida Residents

In nearly every category of spending, the majority of Florida residents would spend the same amount on each type of entertainment if gambling opportunities were reduced in Florida (range 77% to 63%).

One-in-five Florida residents would spend more on travel (20%), one-in-seven would spend more on shopping (15%), bars/restaurants (14%), recreation/sports (14%), and shows (14%) if gambling opportunities were reduced in Florida.

Table 55:
If Florida reduced gambling opportunities in the State, which types of activities/ entertainment would you spend more or less in?
Florida Residents

	Spend More	Spend Less	Spend the same	Don't Know
Travel	20.1	5.6	66.6	7.6
Shopping	14.8	3.3	76.9	5.0
Bars and Restaurants	14.1	5.7	73.9	6.3
Recreation/Sports	13.9	7.0	69.7	9.5
Shows	13.7	6.0	71.6	8.7
Nightlife/Clubs	9.2	8.5	70.5	11.8
Lodging	7.9	6.6	75.6	9.8
Casino Gambling	7.9	15.9	63.3	12.9
Spa/Salon	7.7	7.1	72.9	12.3
Conventions and Meetings	4.2	7.8	70.4	17.7

Of all Florida respondents (n=1223)

Benefits of Expanding or Reducing Gambling – Florida Residents vs. Non-Florida Residents

Approximately four in ten (43%) of respondents interviewed believe that expanding gambling in Florida would result in a more favorable outcome for the State. Roughly four in ten (43%) don't know.

Florida residents (54%) are significantly more likely to believe that expanding gambling in the State would result in a more favorable outcome for the State of Florida than their non-Florida counterparts (33%).

Interestingly, non-Florida residents are significantly more likely (55%) than their Florida counterparts (32%) to not know if expanding or reducing gambling in the State would have a more favorable outcome for the State of Florida.

Table 56:
Which would have a more favorable outcome for the State of Florida?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Expanding Gambling in Florida	43.2	53.6[a]	32.7
Reducing Gambling in Florida	13.6	14.8	12.4
Don't know	43.2	31.6	54.9[a]

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents and non-residents

Benefits of Expanding or Reducing Gambling – Florida Residents by Region

Roughly half of Florida residents in each Florida region believe that expanding gambling in the State would result in a more favorable outcome for the State of Florida (range 49% to 55%).

Roughly one-in-six Florida residents in each region believe that reducing gambling in Florida would have a more favorable outcome for the State of Florida (range 13% to 16%).

Roughly one-in-three in each region don't know (range 30% to 36%).

Table 57:
Which would have a more favorable outcome for the State of Florida?
Florida Residents by Region

	Central Florida Residents % (n=181)	North Florida Residents % (n=553)	South Florida Residents % (n=489)
Expanding Gambling in Florida	49.2	55.2	53.6
Reducing Gambling in Florida	15.2	13.4	15.9
Don't know	35.4	31.5	30.4

Of all Florida respondents (n=1223)

Who Benefits from Expanded Gambling Opportunities in the State of Florida

Nearly seven-in-ten respondents (68%) believe that residents would benefit from expanding gambling in the State, while approximately six-in-ten believe that tourists would benefit from expanded gambling in the State.

At least seven-in-ten Florida residents believe that residents and tourists would benefit from expanding gambling in the State, while approximately six-in-ten non-Florida residents believe that residents and tourists would benefit from expanded gambling in the State.

Table 58:
Who would benefit from expanding gambling in the State of Florida?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Residents	68.7	70.0	67.3
Tourists	67.5	74.4	60.0
Not sure	12.5	8.8	16.2

Of all respondents (n=2436)
**Note: does not round to 100 due to multiple responses*

Who Benefits from Reduced Gambling Opportunities in the State of Florida

At least six-in-ten Florida residents in each region believe that residents and tourists would benefit from reduced gambling opportunities in Florida (range 65% to 75%).

Table 59:
Who would benefit from reducing gambling in the State of Florida?
Florida Residents by Region

	North Florida Residents % (n=189)	Central Florida Residents % (n=553)	South Florida Residents % (n=489)
Residents	64.6	71.9	70.0
Tourists	73.8	74.9	74.2
Not sure	9.4	9.4	7.7

Of all Florida respondents (n=1223)
**Note: does not round to 100 due to multiple responses*

Likelihood to Visit Select Florida Destinations if Gambling is Expanded

The majority of respondents indicate that they are more likely to visit each of the Florida destinations listed if more opportunities for gambling existed (range 77% to 92%).

Table 60:
Would you be more likely, equally likely or less likely to visit the following Florida locations if more opportunities for gambling existed?*
All Respondents

	Less Likely %	More Likely %
Orlando	22.8	77.2
Tampa/St. Pete	17.2	82.8
Jacksonville	8.1	91.9
Naples	9.0	91.0
Miami	16.5	83.5
Panama City/ Fort Walton Beach	8.8	91.2
Daytona Beach	12.5	87.5
West Palm Beach	10.4	89.6
Ft. Lauderdale	14.1	85.9

Of all respondents (n=2436)

Responses were coded as dichotomous 0=less likely, 1=more likely

Benefits of Gambling To Florida – Florida Residents vs. Non-Florida Residents

More than six in ten respondents believe that gambling offers the benefits of creating more jobs in the State or community (61%), while half believe that gambling would attract more visitors to the state (54%), or generate more revenue for local and small business (49%).

Florida residents are significantly more likely to believe that gambling offers the benefits of creating more jobs in the State or community (69% vs. 53%), attracting more visitors to the state (63% vs. 46%), generating more revenue for local and small businesses (55% vs. 44%), attracting more investment in the state or community (40% vs. 26%), and creating a positive impact on the cultural identity of the community (12% vs. 8%) than non-Florida residents.

Alternatively, non-Florida residents are significantly more likely to believe that gambling creates additional tax revenue for the state and local governments (44% vs. 34%) and are not sure or don't know what benefits gambling offers (21% vs. 8%).

Table 61:
Which of the following benefits do you believe gambling offers Florida?*

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Create more jobs in the state or your community	61.2	69.3[a]	53.0
Attract more visitors to the state	54.4	63.1[a]	45.7
Generate more revenue for local and small businesses	49.3	54.7[a]	43.9
Attract more investment to the state or your community	33.1	40.1[a]	26.1
Create additional tax revenue for state and local governments	40.9	34.0	44.2[a]
Create a positive impact on the cultural identity of the community	9.7	11.8[a]	7.6
Don't know/not sure	14.8	8.2	21.4[a]
There would be no benefit to having destination casino resorts in Florida	7.2	7.6	6.8

Of all respondents (n=2436)

a - Denotes a significant difference from Florida residents and non-residents

Benefits of Gambling To Florida – Florida Residents by Region

Across the three regions of Florida, a larger proportion of residents believe that gambling offers Florida the most benefits in terms of creating more jobs in the state or community (range 66% to 71%), creating additional tax revenue for state and local governments (range 65% to 67%), attracting more investment to the state or community (range 62% to 65%), and generating more revenue for local and small businesses (range 53% to 56%).

Table 62:
Which of the following benefits do you believe gambling offers Florida?*
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=583)	South Florida Residents % (n=489)
Create more jobs in the state or your community	65.7	69.1	71.0
Create additional tax revenue for state and local governments	65.2	66.7	65.6
Attract more investment to the state or your community	64.6	62.2	64.0
Generate more revenue for local and small businesses	53.0	56.4	53.6
Attract more visitors to the state	40.9	40.3	40.0
Create a positive impact on the cultural identity of the community	12.2	12.8	10.4
There would be no benefit to having destination casino resorts in Florida	7.7	8.5	6.4

Of all Florida Respondents (n=1223)
**Multiple responses allowed.*

PREFERRED GAMBLING REGULATIONS

Preferences toward Gambling Regulations – Florida Residents vs. Non-Florida Residents

More than five in ten respondents believe that the State should regulate gambling at Internet sweepstakes cafes, arcades and truck stops.

More than six-in-ten Florida residents and half of non-Florida residents believe that the State should regulate gambling at Internet sweepstakes cafes, arcades, and truck stops.

Table 63: Should the state regulate gambling at? (% Yes)

	Total Sample % Yes (n=2436)			Florida Residents % Yes (n=1223)			Non-Florida Residents % Yes (n=1213)		
	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know
Internet sweepstakes cafes	59.4	14.8	25.8	65.6	13.7	20.8	53.2	16.0	30.8
Arcades	57.6	17.6	24.8	61.7	17.3	20.9	53.5	17.9	28.6
Truck stops	57.7	16.5	25.8	61.0	16.0	23.0	54.4	16.9	28.7

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents and Non-residents

Preferences toward Gambling Regulations – Florida Residents by Region

Residents in Central and South Florida are significantly more likely than their North Florida counterparts to believe the State should regulate gambling at Internet sweepstakes cafes, arcades, and truck stops.

Table 64: Should the state regulate gambling at? Florida Residents by Region (% Yes)

	North Florida Residents % (n=181)			Central Florida Residents % (n=553)			South Florida Residents % (n=483)		
	Yes	No	DK	Yes	No	DK	Yes	No	DK
Internet sweepstakes cafes	59.1	16.6	24.3	68.7[a]	12.1	19.2	64.4	14.5	21.1
Arcades	53.3	20.4	26.0	63.7[a]	16.5	19.9	62.7	17.2	20.1
Truck stops	53.3	18.2	28.2	63.5[a]	15.2	21.3	61.1	16.1	22.8

Of all Florida respondents (n=1223)

a - Denotes a significant difference between Florida residents by region

Preferences toward Prohibiting Gambling – Florida Residents vs. Non-Florida Residents

Roughly one in three respondents interviewed believe that the State should prohibit gambling at Internet sweepstakes cafes, arcades, and truck stops.

One-third or more of Florida residents and approximately two-in-ten non-Florida residents believe that the State should prohibit gambling at Internet sweepstakes cafes, arcades, and truck stops.

Table 65: Should the state prohibit gambling at? (% Yes)

	Total Sample % Yes (n=2436)			Florida Residents % Yes (n=1223)			Non-Florida Residents % Yes (n=1213)		
	Yes	No	DK	Yes	No	DK	Yes	No	DK
Internet sweepstakes cafes	27.5	38.4	34.1	33.7	37.6	28.7	21.3	39.1[a]	39.6
Arcades	30.2	37.1	32.7	35.6	37.2	27.2	24.8	37.1[a]	38.2
Truck stops	28.2	38.1	33.6	33.5	37.3	29.2	22.9	39.0[a]	38.1

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents and Non-residents

Preferences toward Prohibiting Gambling – Florida Residents by Region

Approximately one-third of Florida residents in each region believe that the State should prohibit gambling at Internet sweepstakes cafes, arcades, and truck stops.

Table 66: Should the state prohibit gambling at? Florida Residents by Region (% Yes)

	North Florida Residents % (n=181)			Central Florida Residents % (n=553)			South Florida Residents % (n=483)		
	Yes	No	DK	Yes	No	DK	Yes	No	DK
Internet sweepstakes cafes	35.4	32.0	32.6	34.9	38.9	26.2	31.7	28.5	29.8
Arcades	38.7	32.0	29.3	35.1	37.6	27.3	35.0	38.9	26.1
Truck stops	35.4	32.0	32.6	32.4	39.6	28.0	34.2	36.9	29.0

Of all Florida respondents (n=1217)

Preferences toward Taxing Gambling – Florida Residents vs. Non-Florida Residents

Approximately two-thirds of respondents interviewed believe that the State should tax gambling at Internet sweepstakes cafes, arcades, and truck stops.

More than two-thirds of Florida residents and six-in-ten non-Florida residents believe that the State should tax gambling at Internet sweepstakes cafes, arcades, and truck stops.

Table 67:
Should the state of Florida tax gambling at?
(% Yes)

	Total Sample % Yes (n=2436)			Florida Residents % Yes (n=1223)			Non-Florida Residents % Yes (n=1213)		
	Yes	No	DK	Yes	No	DK	Yes	No	DK
Internet sweepstakes cafes	63.7	14.8	21.5	68.4[a]	14.3	17.3	59.0	15.2	25.7
Arcades	63.3	14.8	21.9	67.5[a]	14.3	18.2	59.2	15.3	25.5
Truck stops	64.0	13.9	22.1	68.1[a]	13.6	18.3	60.0	14.2	25.8

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents and Non-residents

Preferences toward Taxing Gambling – Florida Residents by Region

More than two-thirds of Florida residents in each region believe that the State should tax gambling at Internet sweepstakes cafes, arcades, and truck stops.

Table 68:
Should the state of Florida tax gambling at?
Florida Residents by Region
(% Yes)

	North Florida Residents % (n=181)			Central Florida Residents % (n=553)			South Florida Residents % (n=483)		
	Yes	No	DK	Yes	No	DK	Yes	No	DK
Internet sweepstakes cafes	69.6	13.8	16.6	70.0	13.0	17.0	66.3	15.9	17.8
Arcades	69.6	13.3	17.1	68.7	12.5	18.8	65.4	16.8	17.8
Truck stops	69.1	13.8	17.1	69.4	12.7	17.9	66.5	14.5	19.0

Of all Florida respondents (n=1217)

Preferences toward Reducing Slot Machines at Pari-mutuel Facilities in Florida – Florida Residents vs. Non-Florida Residents

Roughly one-in-five respondents are in favor of the State of Florida reducing the number and operation of slot machines at Pari-mutuel facilities in Florida.

Florida residents (37%) are significantly less likely than their non-Florida counterparts (25%) to be in favor of reducing the number and operation of slot machines at Pari-mutuel facilities in Florida.

Non-Florida residents (58%) are significantly more likely than Florida residents (42%) to be unsure of whether they are in favor of reducing the number and operation of slot machines at Pari-mutuel facilities in Florida.

Table 69:
If the State of Florida were to reduce the number and operation of slot machines at Pari-mutuel facilities in Florida- would you be in favor of this?

	Total Sample % Yes (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	19.2	21.2	17.3
No	30.9	37.2[a]	24.5
Don't Know/Not sure	49.9	41.6	58.2[a]

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents vs., non-Florida residents

Preferences toward Reducing Slot Machines at Pari-mutuel Facilities in Florida – Florida Residents by Region

Roughly one-in-five respondents in each region is in favor of the State of Florida reducing the number and operation of slot machines at Pari-mutuel facilities in Florida.

Slightly more South (38%) and Central (38%) Florida residents are less likely than their Central Florida counterparts (34%) to be in favor of reducing the number and operation of slot machines at Pari-mutuel facilities in Florida.

Approximately four-in-ten Florida residents in each region don't know.

Table 70:
If the State of Florida were to reduce the number and operation of slot machines at Pari-mutuel facilities in Florida- would you be in favor of this?
Florida Residents by Region[a]

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=483)
Yes	21.5	21.2	20.9
No	34.3	37.6	38.1
Don't Know/Not sure	44.2	41.2	41.0

Of all Florida respondents (n=1217)

a - Denotes a significant difference between Florida residents by Region

Preferences toward Authorizing Table Games Slot at Pari-mutuel Facilities in Florida – Florida Residents vs. Non-Florida Residents

More than one in three (34%) respondents interviewed are in favor of the State of Florida authorizing Pari-mutuel facilities in Florida to conduct table games.

Florida residents (42%) are significantly more likely than their non-Florida counterparts (27%) to be in favor of the State of Florida authorizing Pari-mutuel facilities in Florida to conduct table games.

Non-Florida residents (54%) are significantly more likely than Florida residents (36%) to be unsure of whether they are in favor of the State of Florida authorizing Pari-mutuel facilities in Florida to conduct table games.

Table 71:
If the State of Florida were to authorize Pari-mutuel facilities in Florida to conduct table games - would you be in favor of this?

	Total Sample % Yes (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	34.4	42.2[a]	26.6
No	20.6	21.9	19.3
Don't Know/Not sure	45.0	35.9	54.1[a]

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents vs. non-Florida Residents

Preferences toward Authorizing Table Games at Pari-mutuel Facilities in Florida – Florida Residents by Region

Central (43%) and South (43%) Florida residents are significantly more likely to be in favor of the State of Florida authorizing Pari-mutuel facilities in Florida to conduct table games than North Florida residents (37%), while more than one-third in each region don't know.

Table 71:
If the State of Florida were to authorize Pari-mutuel facilities in Florida to conduct table games - would you be in favor of this?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=483)
Yes	36.5	43.4[a]	43.3[b]
No	26.0	19.9	22.6
Don't Know/Not sure	37.6	36.7	34.2

Of all Florida respondents (n=1217)

a - Denotes a significant difference between Central Florida residents and North Florida Residents

b- Denotes a significant difference between South Florida residents and North Florida Residents

Preferences toward Pari-mutuel Facilities in Florida – Florida Residents and Non-Florida Residents

Approximately one-third of all respondents believe there should be no change in each of the types of pari-mutuel facilities in Florida.

Slightly more respondents believe the State should prohibit or reduce Greyhound racing as compared to other forms of pari-mutuel racing, while a slightly greater proportion would like to see the thoroughbred racing expanded as compared to other forms of pari-mutuel racing.

Approximately one-third don't know.

Table 73:
From your perspective, which changes to the following pari-mutuel facilities should the State of Florida consider?
All Respondents

	Prohibit % Yes	Reduce % Yes	Expand % Yes	No Change % Yes	DK % Yes
Thoroughbred racing	10.0	7.4	20.0	30.6	32.0
Harness racing	10.5	7.9	15.3	30.7	35.7
Quarter horse racing	10.1	7.7	16.1	30.6	35.5
Greyhound racing	17.5	11.7	11.8	28.0	31.0

Of all respondents (n=2436)

Preferences toward Pari-mutuel Facilities in Florida – Florida Residents

Approximately one-third of Florida residents believe there should be no change in each of the types of pari-mutuel facilities in Florida.

While one-in-five would like to see Greyhound racing prohibited and roughly one-in-ten or less would like to see each of the other forms of pari-mutuel racing prohibited.

Approximately one-in-five Florida respondents would like to see Thoroughbred, Harness, and Quarter horse racing expanded, while approximately one-quarter to one-third of Florida residents don't know.

Table 74:
From your perspective, which of the following pari-mutuel facilities should the State of Florida consider?
Florida Residents

	Prohibit % Yes	Reduce % Yes	Expand % Yes	No Change % Yes	DK % Yes
Thoroughbred racing	11.4	6.6	22.6	33.4	25.8
Harness racing	11.4	7.4	17.1	33.3	30.7
Quarter horse racing	11.2	7.2	17.4	33.3	30.9
Greyhound racing	19.1	12.3	12.7	31.8	24.1

Of all Florida Residents (n=1223)

Preferences toward Pari-mutuel Facilities in Florida – Non-Florida Residents

Roughly one-quarter of non-Florida residents believe there should be no change in each of the pari-mutuel facilities in Florida and approximately four-in-ten don't know.

With the exception of Greyhound racing, a slightly greater proportion of non-Florida residents believe that the other forms of pari-mutuel racing should be expanded.

Table 75:
From your perspective, which of the following pari-mutuel facilities should the State of Florida consider?
Non-Florida Residents

	Prohibit % Yes	Reduce % Yes	Expand % Yes	No Change % Yes	DK % Yes
Thoroughbred racing	8.8	8.1	17.3	27.8	38.2
Harness racing	9.6	8.3	13.4	28.0	40.6
Quarter horse racing	9.0	8.2	14.8	28.0	40.0
Greyhound racing	15.8	11.2	10.9	24.3	37.9

Of all non-Florida residents (n=1213)

IMPACT OF EXPANDED DESTINATION CASINO GAMBLING ON FLORIDA

Preferences toward New Destination Casinos - Florida Residents vs. Non-Florida Residents

Almost half of respondents interviewed (48%) believe that Florida should authorize new destination casino resorts.

Florida residents are significantly more likely than their non-Florida counterparts to believe that Florida should authorize new destination casino resorts (57% vs. 39%), while non-Florida residents are significantly more likely than Florida residents to not be in favor of authorizing new destination casino resorts in Florida (43% vs. 20%).

Table 76:
Florida currently has limited large-scale destination casino resorts, should Florida authorize new destination casino resorts?

	Total Sample % Yes (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
Yes	47.9	56.9[a]	38.9
No	19.4	20.3	42.6[a]
Don't Know/Not sure	32.7	22.8	18.5

Of all respondents (n=2436)

a - Denotes a significant difference between Florida residents and Non-residents

Preferences toward New Destination Casinos – Florida Residents by Region

Nearly six-in-ten (58%) South and Central Florida residents and half (49%) of North Florida residents believe that Florida should authorize new destination casino resorts.

Table 77:
Florida currently has limited large-scale destination casino resorts, should Florida authorize new destination casino resorts?
Florida Residents by Region

	North Florida Residents % (n=181)	Central Florida Residents % (n=553)	South Florida Residents % (n=483)
Yes	49.2	58.2	58.4
No	20.4	21.0	19.5
Don't Know/Not sure	30.4	20.8	22.2

Of all Florida respondents (n=1217)

Preferences toward Number of Destination Casino Resorts in Florida

Four in ten (44%) respondents interviewed believe that the State should authorize between 2-3 additional destination casino resorts in Florida.

Of those who agree that the State of Florida should authorize new destination casino resorts, non-Florida residents (46%) are significantly more likely than Florida residents (42%) to believe that 2-3 more should be allowed. Non-Florida residents (32%) are also significantly more likely than Florida residents (29%) to believe that 4-8 more should be allowed.

Florida residents (26%) are significantly more likely than their non-Florida counterparts (19%) to believe that more than 8 new destination casino resorts should be allowed.

Table 78:
Florida currently has limited large-scale destination casino resorts. Should Florida authorize new destination casino resorts? If yes—how many do you believe should be allowed?

	Total Sample % Yes (n=2436)	Florida Residents % (n=1223)	Non-Florida Residents % (n=1213)
1	2.8	2.6	3.2
2-3	43.8	42.2	46.1[a]
4-8	29.9	28.7	31.5[a]
More than 8	23.5	26.4[a]	19.2

Of those who agree the state should authorize new destination casino resorts (n=2436)

a - Denotes a significant difference from Florida residents

Perceived Benefits of Destination Casino Resorts to Florida – All Respondents

More than half of respondents interviewed (56%) believe that expanded gambling would be beneficial to Florida, while three-in-ten are in favor of bringing large-scale destination casino resorts to their town.

Two-in-ten is either not in favor of bringing large-scale destination casino resorts to their town or is in favor of bringing large-scale destination casino resorts to Florida, but don't want one in their city or town.

Table 79:
Which of the following statements would you agree with?

	All Respondents % Yes (n=2436)
Expanding gambling would be beneficial to Florida	55.9
I'm in favor of bringing a large-scale destination casino resort to my town	32.2
I'm not in favor of bringing a large- scale destination casino resort to my town	27.5
I'm in favor of bringing large-scale destination casino resorts to Florida but don't want a large-scale destination casino resort in my city/town	26.1
No opinion	11.1
Reducing gambling would be beneficial to Florida	10.0
I do not agree with any of the above	5.5

Of all Florida Residents (n=2436)

Responses were yes/no

Perceived Benefits of Destination Casino Resorts to Florida – Florida Residents

More than four-in-ten Florida residents (46%) believe that expanded gambling would be beneficial to Florida, while roughly one in three are in favor of bringing large-scale destination casino resorts to their town.

One-in-five Florida residents is either not in favor of bringing large-scale destination casino resorts to their town or is in favor of bringing large-scale destination casino resorts to Florida, but don't want one in their city or town.

Table 80:
Which of the following statements do you agree with?

	Florida Residents % Yes (n=1223)
Expanding gambling would be beneficial to Florida	45.5
I'm in favor of bringing a large-scale destination casino resort to my town	31.2
I'm not in favor of bringing a large- scale destination casino resort to my town	21.7
I'm in favor of bringing large-scale destination casino resorts to Florida but don't want a large-scale destination casino resort in my city/town	21.3
No opinion	16.1
Reducing gambling would be beneficial to Florida	10.6
I do not agree with any of the above	4.5

Of all Florida Residents (n=1223)

Responses were yes/no

Perceived Benefits of Destination Casino Resorts to Florida – Non - Florida Residents

More than six-in-ten non-Florida residents (65%) believe that having large-scale destination casino resorts in Florida would be beneficial to Florida, while one-in-three has no opinion or believe that expanded gambling would be beneficial to the State or they would be in favor of visiting a large-scale destination casino resort in Florida.

Table 80:
With which of the following statements do you agree?*

	Non-Florida Residents % Yes (n=1213)
Having a large-scale destination casino resorts in Florida would be beneficial to Florida	64.8
No opinion	32.7
Expanding gambling would be beneficial to Florida	30.1
I would be in favor of visiting a large-scale destination casino resort in Florida	28.2
I do not agree with any of the above	10.0
Reducing gambling would be beneficial to Florida	9.5

Of all non-Florida residents (n=1213)

**Does not equal 100%. Multiple responses were allowed.*

GAMBLING ADDICTION CHARACTERISTICS

Gambling Addiction Characteristic – Restless, Irritable, Anxious

Less than one-percent of respondents who elected to answer this question reported becoming restless, irritable, or anxious when trying to stop and or cut down on gambling.

Table 81:
During the past 12 months, have you become restless, irritable, or anxious when trying to stop and or cut down on gambling?*

	N	%
Yes	1	0.5
No	*189*	*99.5*

**Of those who answered the question (n=190)*

Gambling Addiction Characteristic – Hiding Gambling Behavior

Approximately one-percent of respondents who elected to answer this question reported having tried to keep their family or friends from knowing how much they have gambled.

Table 82:
During the past 12 months, have you tried to keep your family or friends from knowing how much you gambled?*

	N	%
Yes	2	1.1
No	188	98.9

**Of those who answered the question (n=190)*

Gambling Addiction Characteristic – Financial Trouble

Approximately one-percent of respondents who elected to answer this question reported having such financial trouble as a result of gambling that they had to get help with living expenses from family, friends, or welfare.

Table 83:
During the past 12 months, did you have such financial trouble as a result of gambling that you had to get help with living expenses from family, friends or welfare?*

	N	%
Yes	2	1.1
No	188	98.9

**Of those who answered the question (n=190)*

DEMOGRAPHIC CHARACTERISTICS OF THE SAMPLE

Gender

Approximately 52% of the total sample is female.

Table 84:
What is your gender?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
Male	47.9	47.3	48.5
Female	52.1	52.7	51.5

Household Income

Slightly more than four-in-ten respondents earn a household income of less than $50,000, roughly one-third earn between $50,000 and $99,999 per year, and approximately one-in-five earn $100,000 or more.

Table 85:
What is your annual income?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
Less than $50,000	44.4	45.8	42.9
$50,000 to $99,999	35.7	36.2	35.1
$100,000 to $150,000	13.1	12.3	13.8
$150,000 or more	6.9	5.6	8.1

Marital Status

Nearly half of the total sample is married, one-in-ten is divorced or an unmarried couple living together. Between one-quarter and one-in-three respondents have never been married.

Table 86:
What is marital status?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
Married	46.9	47.5	46.4
Separated	1.6	2.0	1.2
Divorced	11.7	12.3	11.1
Widowed	3.0	3.8	2.3
Unmarried couple living together	9.1	9.1	9.0
Never married	27.7	25.3	30.0

Children in the Household

Seven-in-ten respondents does not currently have children in the home.

Table 87:
How many children do you in the home?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
Yes	29.6	28.2	31.0
No	70.4	71.8	69.0

Ethnicity

Eight-in-ten survey respondents are of white, non-Hispanic ethnicity. One-in-ten Florida respondents is white, Hispanic, as compared to less than one-in-twenty non-Florida respondents. There is a slightly greater proportion of respondents of Asian ethnicity in the non-Florida sample (7%), as compared to the Florida sample (4%).

Table 88:
What is your race/ethnicity?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
White, non-Hispanic	80.6	79.5	81.8
White, Hispanic	6.6	9.5	3.7
Black, non-Hispanic	3.9	4.4	3.4
Black, Hispanic	0.6	0.8	0.3
Native American	0.7	0.6	0.8
Asian	5.5	3.7	7.4
Other	2.1	1.6	2.5

Occupation

More than half of respondents are employed full-time. One-in-ten is employed part-time.

Table 89:
What is your primary occupation?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
Employed full-time	52.7	51.3	54.1
Employed part-time	11.1	10.5	11.6
Temporarily unemployed	6.0	6.1	5.8
Homemaker full time	5.3	4.8	5.8
Student full time	6.2	5.6	6.7
Retired	18.7	21.6	15.9

Education

Roughly one-in-three respondents has an education of 1-3 years or 4 years of college. One-quarter has 1 year of graduate school or more.

Table 90:
What was the last educational level you completed?

	Total Sample % (n=2436)	Florida Residents % (n=1223)	Non-residents of Florida % (n=1213)
Less than 4 years of high school	1.3	1.3	1.2
4 years of high school	13.5	14.7	12.3
1-3 years college	29.1	29.9	28.2
4 years college	31.4	29.8	33.1
1 year of graduate school or more	24.8	24.3	25.2

APPENDIX

SPECTRUM GAMING GROUP AND FLORIDA LEGISLATURE
GAMING CONSUMER SURVEY

Survey

[All Respondents] **Demographics**
D1. What is your age? [18+ ONLY]

D2. Are you…?
1. Male
2. Female

D3. What is your annual household income?
1. Less than $50,000
2. $50,000 - $99,999
3. $100,000 - $150,000
4. $150,000 or more

D4. What is your marital status?
1. Married
2. Separated
3. Divorced
4. Widowed
5. Unmarried couple living together
6. Never married

D5. Do you have children in your household?
1. Yes
2. No

D6. What is your zip code? [FIVE DIGITS]

Core Survey Questions

1. [NON RESIDENTS ONLY] Have you visited Florida during the past two years?
   Yes 01
   No 02
   Don't Know 98
   Refused 99

2. [NON RESIDENTS ONLY] How interested are you in visiting Florida during the next year? [5-PT SCALE WHERE 1="NOT AT ALL INTERESTED" AND 5="EXTREMELY INTERESTED"]

3. How well does each attribute listed below describe Florida? Your responses should be based on your impressions, whether from personal experience or what you've heard/ read from friends, family or in the media. [5-PT SCALE WHERE 1= "DOES NOT DESCRIBE WELL AT ALL" AND 5= "DESCRIBES EXTREMELY WELL" [ROTATE]
   1. Slow-paced lifestyle
   2. Open-minded
   3. Independent
   4. Crowded
   5. Diverse
   6. Family-oriented
   7. Clean
   8. Health and wellness-focused
   9. Interesting
   10. Friendly
   11. Affordable
   12. Popular
   13. Safe
   14. Fun
   15. Beautiful scenery
   16. Liberal
   17. Conservative
   18. Innovative
   19. Hip, cool, contemporary

Next, we would like to ask you some questions related to your attitude, preferences and experience with various kinds of gambling. By gambling, we mean placing a bet on the outcome of a race, betting on a sporting event or at a casino, or playing the lottery - - in which you might win or lose something of value. First, I would like to ask you about some popular activities.

1. Have you ever gambled in your lifetime?
   Yes 01
   No 02
   Don't Know 98
   Refused 99

2. Have you gambled during the past 12 months?
   Yes 01
   No 02
   Don't Know 98
   Refused 99

3. [If Q2=1]If yes, about how often did you gamble during the past 12 months?
   Daily (30+ times per month) 01
   Several times a week (6 - 29 times per month) 02
   Several times a month (3 – 5 times per month) 03
   Once a month or less (6 - 12 times per year) 04
   Only a few days all year (1 - 5 times per year) 05
   Not at all in the past 12 months (0 times) 06
   Don't Know 98
   Refused 99

4. How much do you spend gambling in an average year?
   1. ___$__________________(rounded to the nearest dollar please)

5. [IF Q2=1] If yes, what types of gambling do you participate in? And how often? (select all that apply) [ROTATE]

Gambling Type	*Daily*	*Several times per week*	*Several times per month*	*Once a month or less*	*Only a few days a year*	*Not at all during the past 12 months*	*Don't Know*
1. Gambling in a Casino							
2. Playing Gaming Machines Outside a Casino such as at a horsetrack, dogtrack, Jai-alai fronton, Internet sweepstakes café etc							
3.Playing the Lottery							
4.Betting on Horse Racing							
5. Betting on Dog Racing							
7. Betting on Jai-Alai							
6.Sports Betting such as on Football, Baseball, Hockey, Soccer, etc (whether legal or not)							
7.Online Gambling							
8.Other Gambling Activities [Anchor]							

6. [IF Q2=1] When you gamble at a casino, what game do you usually play? (ASK OPEN ENDED, CODE INTO CATEGORIES)

Card games such as blackjack or poker 01
Other table games, such as roulette or craps 02
Slot machines 03
Other video games, such as video poker 04
Keno-type games 05
Sports betting 06
Horse or dog race betting 07
Bingo 08
Pull-tabs 09
Other (Specify) 80
Don't Know 98
Refused 99

7. [IF Q2=1] Why do you participate in gambling? (select all that apply) [ROTATE]

	Never	*Sometimes*	*Often*	*Always*
i. For the chance of winning money or prizes				
ii. Because it's fun				
iii. As a hobby or a pastime				
iv. To escape boredom or to fill my time				
v. Because I'm worried about not winning if I don't play				
6. To compete with others (e.g. bookmaker, other gamblers)				
8. Because it's exciting				
9. For the mental challenge or to learn about the game or activity				
10. Because of the sense of achievement when I win				
11. To impress other people				
12. To be sociable				
13. Because it helps when I'm feeling tense				
14. To make money				
15. To relax				
16. Because it's something that I do with my friends or family				
17. Other (Specify) [ANCHOR]				

10. [IF Q2=2] Why don't you participate in gambling?:[ROTATE]
    1. Live too far away
    2. Inconvenient
    3. Not interested
    4. Religious reasons
    5. Moral grounds
    6. Have other things that I would rather spend my time on
    7. Have other things that I would rather spend my money on
    8. Other (specify) [ANCHOR]

11. [If Q1=1] Have you ever gambled in Florida (other than lottery)?
    Yes 01
    No 02
    Don't Know 98
    Refused 99

12. [If Q11=1] Have you gambled in Florida during the past 12 months (other than lottery)?
    Yes 01
    No 02
    Don't Know 98
    Refused 99

13. [If Q11=1] [For those who gambled in Florida]. Where in Florida have you gambled? [ROTATE]

    Indian Casinos (Land Based)
    1. Miccosukee Resort & Gaming
    2. Seminole Casino Big Cypress
    3. Seminole Casino Brighton
    4. Seminole Casino Hollywood
    5. Seminole Casino Coconut Creek
    6. Seminole Casino Immokalee
    7. Seminole Hard Rock Hotel & Casino- Hollywood
    8. Seminole Hard Rock Hotel & Casino- Tampa

    Pari-mutuel Gaming Facilities
    a. Dog Racetracks
        i. bestbet Jacksonville
        ii. Daytona Beach Kennel Club/West Volusia
        iii. Derby Lane
        iv. Ebro Greyhound Park
        v. Flagler Dog Track & Magic City Casino
        vi. Jefferson County Kennel Club
        vii. Mardi Gras Casino/Racetrack
        viii. Melbourne Greyhound Park
        ix. Naples Fort Myers Greyhound
        x. Orange Park Kennel Club
        xi. Palm Beach Kennel Club/P B Greyhound
        xii. Pensacola Greyhound Track
        xiii. Sanford Orlando/Penn Sanford
        xiv. Sarasota Kennel Club
        xv. St. Johns Greyhound Park
        xvi. Tampa Greyhound Track
    b. Horse Racetracks
        i. Calder Casino/Tropical Park
        ii. Gulfstream Park
        iii. Tampa Bay Downs

iv. The Isle at Pompano Park
v. OBS South Marion

c. Jai-Alai Fronton
   i. Dania/Summersport Jai Alai
   ii. Fort Pierce Jai Alai
   iii. Hamilton Jai Alai
   iv. Magic City Jai Alai
   v. Miami/Summer Jai Alai
   vi. Ocala Poker & Jai Alai
   vii. Orlando Jai Alai

d. Casino Style Gaming Centers (e.g. internet/sweepstakes cafe)
e. Casino Boats (Day Cruise- Off Shore) ___________________________
f. Other (specify) [ANCHOR] ___________________________________
g. Don't know/not sure [MUTUALLY EXCLUSIVE/ANCHOR]

14. [ALL RESPONDENTS] How likely are you to gamble in Florida in the future? [5-PT SCALE WHERE 1="NOT AT ALL LIKELY" AND 5="EXTREMELY LIKELY"]

15. [If Q14=4 or 5](For those who are likely to gamble in Florida in the future]. Where in Florida are you likely to gamble? [ROTATE]
   i. Indian Casino
   ii. Pari-mutuel Facility
      1. Dogtrack
      2. Horsetrack
      3. Jai-Alai Fronton
   iii. Gaming Parlors in Florida (e.g., Internet sweepstakes café)
   iv. Internet/sweepstakes cafe
   v. Lottery in Florida
   vi. Other (specify) [ANCHOR]
   vii. Don't know/not sure [MUTUALLY EXCLUSIVE/ANCHOR]

16. [If Q2=1]For those who gambled in past year] If you had to estimate how much money you gambled during the last year, what would be your estimate in dollars ______________?
    b. How much of that [in percentage] was in the State of Florida? ____________

17. [ALL RESPONDENTS] Do you estimate spending the same amount this year in gambling as you did last year?
    1. Yes
    2. No
    3. Don't know/ not sure
    4. Refused

18. [ALL RESPONDENTS] How do you feel about gambling in general?
    1. I support gambling
    2. I support gambling but do not participate
    3. I oppose gambling
    4. Neutral- neither support or oppose gambling in general
    5. No opinion

19. [ALL RESPONDENTS] How do you feel about expanding gambling opportunities in Florida?
    1. I support expanding gambling in Florida
    2. I support expanding gambling in Florida but will not participate
    3. I oppose expanding gambling in Florida
    4. Neutral – neither support or oppose
    5. No opinion

20. [ALL RESPONDENTS] How do you feel about reducing the opportunities to gamble in Florida?
    1. I support reducing the opportunities to gamble in Florida
    2. I support reducing gambling in Florida but will not participate
    3. I oppose to reducing opportunities for gambling in Florida
    4. Neutral – neither support or oppose
    5. No opinion

21. [ALL RESPONDENTS] Which of the following gambling opportunities would you like to see expanded or restricted or reduced in Florida (Check all that apply, Rotate)?

Gambling Type	*Expanded*	*Restricted*	*Reduced*	*No Opinion*	*Don't Know*
Casino Gambling at tribal facilities					
Casino gambling at commercial resorts					
Lottery					
Gambling at internet sweepstakes cafes					
Casino gambling at Horse Racetracks					
Casino gambling at dog racetracks					
Casino Gambling at Jai-alai Frontons					
Sports Betting					
Online Gambling					
Other Gambling Activities [Anchor]					

22. [FOR NON-RESIDENTS WHO COME TO FLORIDA] If Florida <u>expanded</u> gambling opportunities would you come to Florida?
    i. More
    ii. Less
    iii. The Same
    iv. Don't know

23. [FOR NON-RESIDENTS WHO COME TO FLORIDA] If Florida <u>reduced</u> the opportunities for gambling, would you travel to Florida?
    1. More
    2. Less
    3. The Same
    3. Don't know

24. [FOR NON-RESIDENTS WHO DO NOT COME TO FLORIDA] If Florida expanded gambling opportunities would you (then) come to Florida?
    1. Yes
    2. No
    3. Don't know

25. [FOR NON-RESIDENTS WHO DO NOT COME TO FLORIDA] If Florida restricted gambling opportunities would you (then) come to Florida?
    1. Yes
    2. No
    3. Don't know

26. [FOR NON-RESIDENTS WHO DO NOT COME TO FLORIDA] If Florida reduced gambling opportunities would you (then) come to Florida?
    4. Yes
    5. No
    6. Don't know

27. [FOR RESIDENTS OF FLORIDA] If Florida reduced the gambling opportunities in the State, which of the following types of activity / entertainment are you likely to spend more, less, the same?

Activity	*Spend More*	*Spend Less*	*Spend the Sam*	*Don't Know*
1.Shopping				
2.Bars and Restaurants				
3.Shows				
4.Lodging				
5.Conventions or Meetings				
6.Spa / Salon				
7.Nightlife/Clubs				
8.Recreation/ Sports				
9.Casino Gambling				
10. Travel				
Other (Specify)				

28. [ALL RESPONDENTS] How important do you think the gambling industry is in terms of contributing to the overall travel and tourism industry in Florida? [5-PT SCALE WHERE 1="NOT AT ALL IMPORTANT" AND 5="EXTREMELY IMPORTANT']

29. [FOR THOSE WHO RESPONDED "3" IN Question 18] From your perspective, why do you oppose gambling? (select all) [ROTATE]
    1. Crime
    2. Problem gambling
    3. Personal reasons
    4. Religious reasons
    5. Moral grounds
    6. Lost productivity
    7. Am not at all opposed to having casinos [MUTUALLY EXCLUSIVE/ANCHOR]
    8. Other (specify) [ANCHOR]
    9. Don't Know/Not sure [MUTUALLY EXCLUSIVE/ANCHOR]

30. [IF Q19=3] If there were additional restrictions or limits on gambling in Florida, would you be more likely to favor expanding gambling in Florida?
    1. Yes
    2. No
    3. Don't know/ not sure

31. Would you be more likely, equally likely or less likely to visit the following destinations in Florida if more opportunities to gamble were available? [ROTATE]
    1. Orlando
    2. Tampa/St. Pete
    3. Jacksonville
    4. Naples
    5. Miami
    6. Panama City/Fort Walton Beach
    7. Daytona Beach
    8. West Palm Beach
    9. Ft. Lauderdale
    10. Other (specify)
    11. Don't know/not sure

32. Which of the following do you believe would have a more favorable outcome for the State of Florida?

    Expanding Gambling in Florida
    1. Yes
    2. No
    3. Don't know/ not sure

    Reducing Gambling in Florida

    4. Yes
    5. No
    6. Don't know/ not sure

33. Who would benefit from expanding gambling in the State of Florida?

Residents	yes	no
Tourists	yes	no
Not sure/don't know		

34. Who would benefit from reducing gambling in the State of Florida?

Residents	yes	no
Tourists	yes	no
Not sure/don't know		

35. Which of the following benefits does/do you feel gambling (would) offers Florida? (select all that apply) [ROTATE]
    1. Create more jobs in the state/ your community
    2. Attract more investment to the state/your community
    3. Generate more revenue for local and small businesses
    4. Create additional tax revenue for state and local governments
    5. Create a positive impact on the cultural identity of the community
    6. Attract more visitors to the state
    7. There would be no benefit to having destination casino resorts in Florida [MUTUALLY EXCLUSIVE/ANCHOR]
    8. Other (specify) [ANCHOR]
    9. Don't Know/Not sure [MUTUALLY EXCLUSIVE/ANCHOR]

36. From your perspective, should the state **regulate** gambling at
    1. Internet sweepstakes cafes YES/NO/DK
    2. Arcades YES/NO/DK
    3. Truck stops YES/NO/DK

37. Should the State of Florida **prohibit** casino gambling at
    1. Internet sweepstakes cafes YES/NO/DK
    2. Arcades YES/NO/DK
    3. Truck stops YES/NO/DK

38. Should the State of Florida **tax** gambling at
    1. Internet sweepstakes cafes YES/NO/DK
    2. Arcades YES/NO/DK
    3. Truck stops YES/NO/DK

39. If the State of Florida were to reduce the number and operation of slot machines at pari-mutuel facilities in Florida (e.g., at Dog Racetracks, Horse Racetracks, Jai-Alai Frontons)—would you be in favor of this?
    1. Yes
    2. No
    3. Don't know/ not sure

40. if the State of Florida were to authorize pari-mutuel facilities (e.g., Dog Racetracks, Horse Racetracks, Jai-Alai Frontons) to conduct table games would you be in favor of this?
    1. Yes
    2. No
    3. Don't know/ not sure

41. Florida currently has limited large-scale destination casino resorts. Should Florida authorize new destination casino resorts?
    1. Yes--- if yes—how many do you believe should be allowed ____________________
        a. 1
        b. 2-3
        c. 4-8
        d. More than 8
    2. No
    3. Don't know/ not sure

42. [FLORIDA RESIDENTS ONLY] Which of the following statements would you agree with? (select all that apply) [ROTATE]
    1. Expanding gambling would be beneficial to Florida.
    2. Reducing gambling would be beneficial to Florida
    3. I'm in favor of bringing a large-scale destination casino resort to my town.
    4. I'm not in favor of bringing a large-scale destination casino resort to my town.
    5. I'm in favor of bringing large-scale destination casino resorts to Florida but don't want a large-scale destination casino resort in my city/town.
    6. I Do not agree with any of the above [ANCHOR/MUTUALLY EXCLUSIVE]
    7. No opinion [ANCHOR/MUTUALLY EXCLUSIVE]

43. [NON RESIDENTS ONLY] Which of the following statements would you agree with? (select all that apply) [ROTATE]
    1. Expanding gambling would be beneficial to Florida.
    2. Reducing gambling would be beneficial to Florida
    3. Having large-scale destination casino resorts Florida would be beneficial to Florida.
    4. I would be in favor of visiting a large-scale destination casino resort in Florida.
    5. I Do not agree with any of the above [ANCHOR/MUTUALLY EXCLUSIVE]
    6. No opinion [ANCHOR/MUTUALLY EXCLUSIVE]

44. [ALL RESPONDENTS BRANCHING QUESTION FROM Q45] From your perspective, which of the following pari-mutuel facilities should the State of Florida consider to do?

a.Thoroughbred racing Prohibit/Reduce/Expand/No Change /DK
b.Harness racing Prohibit/Reduce/Expand/No Change /DK

c.Quarter horse racing Prohibit/Reduce/Expand/No Change /DK

d. Greyhound racing Prohibit/Reduce/Expand/No Change /DK

45. [FOR OUT OF STATE VISITORS] If gambling was expanded in the State of Florida, would you choose to stay in Florida for a longer period of time?

Expanded
1. Yes --- if yes .. how much longer? _________
2. No
3. Don't know

46. [FOR OUT OF STATE VISITORS] If gambling was reduced in the State of Florida, would you choose to stay in Florida for a longer period of time?

reduced
4. Yes --- if yes .. how much longer? _________
5. no
6. don't know

47. [FOR FLORIDA RESIDENTS] If gambling was expanded in the State of Florida, would you more likely to gamble in the State rather than take a trip outside the State?

Expanded
1. Yes
2. No
3. Don't know

48. [FOR FLORIDA RESIDENTS] If gambling was reduced in the State of Florida, would you more likely to gamble out of State rather than gamble in the State?

Expanded
4. Yes
5. No
6. Don't know

50. [For those who gamble] During the past 12 months, have you become restless, irritable, or anxious when trying to stop and (or) cut down on gambling?

i. Yes
ii. No

51. [For those who gamble] During the past 12 months, have you tried to keep your family or friends from knowing how much you gambled?

   i. Yes
   ii. No

52. [For those who gamble] During the past 12 months, did you have such financial trouble as a result of gambling that you had to get help with living expenses from family, friends, or welfare?

Responses:

* Yes

* No

We're almost through! We have just a couple more questions for classification purposes.

D7. Do you consider yourself to be: [ALLOW ONE RESPONSE]
1. White, non-Hispanic
2. White, Hispanic
3. Black, non-Hispanic
4. Black, Hispanic
5. Native American
6. Asian
7. Other

D8. What is your primary occupational status?
1. Employed full-time
2. Employed part-time
3. Temporarily unemployed
4. Homemaker full-time
5. Student full-time
6. Retired

D9. What is the last educational level you completed?
1. Less than 4 years of high school
2. 4 years high school
3. 1-3 years college
4. 4 years college
5. 1 year graduate school or more

D10. How far do you live from a gambling facility?
1. 10 minutes or less
2. 10 minutes to ½ hour
3. About 1 hour
4. 2 hours
5. More than 2 hours away

Lead Investigators

The lead investigators for this Florida Gaming Study are Dr.'s Lori Pennington-Gray and Greg Dunn.

Dr. Lori Pennington-Gray

Dr. Pennington-Gray is an associate professor in the University of Florida's Department of Tourism, Recreation and Sport Management. Dr. Pennington-Gray believes that the tourism industry is the "ambassador for the tourist" and, thus, responsible for informing, directing, and protecting tourists at all times. In alignment, in recent years, she has focused on research in the area of tourism-specific crisis management. Her research initiatives have advanced our understanding of theory, methods, and application for the industry. The contribution and impact of her research is primarily to benefit the destination management organization (DMO). A DMO is the agency responsible for marketing and development of tourism within the destination, which can be at the local, state, or national level. Her research focus is primarily centered on the relationship between the destination management organization and tourists in the context of tourism crisis management. Thus, her research agenda is concentrated on both the supply side (industry) and the demand side (tourists) of tourism crisis management. Specifically, her contributions to the literature have examined tourism crisis preparedness certification (Pennington-Gray, Schroeder, Donohoe, & Wu, 2013) and drivers of social media use in the event of a crisis (Pennington-Gray, Kaplanidou, & Schroeder, 2013; Pennington-Gray & Schroeder, 2013; Schroeder, Pennington-Gray, Donohoe, & Kiousis, 2013). Her research has primarily shown that destinations are not prepared for disasters (Pennington-Gray, Thapa, Kaplanidou, Cahyanto, & McLaughlin, 2011) and that prospective tourists perceive safety as one of the most fundamental criteria for choosing a destination (Pennington-Gray, London, Cahyanto, & Klages, 2011; Pennington-Gray, Schroeder, & Kaplanidou, 2011). Dr. Pennington-Gray has been involved in an number of externally funded projects. She has worked with destination management organizations at the local, state, and national levels. Collectively, Dr. Pennington-Gray's research program has advanced the field's knowledge of tourism crisis management. In particular, her research has extended empirical support for several previously unexplored relationships. Overall, her research findings are tools for managers and policy makers to effectively manage visitors, residents, and destinations.

Dr. Greg Dunn

Dr. Dunn is an assistant professor in Metropolitan State University - Denver's Department of Hospitality, Tourism and Events and a visiting scholar in the University of Florida's Department of Tourism, Recreation and Sport Management. Previously, Dr. Dunn served as executive vice president at MMGY Global (formerly Ypartnership) and a member of the faculty at the University of South Florida. At MMGY, he was responsible for sourcing, composing, managing implementation and interpretation of marketing research and brand strategy while playing an active role in key account leadership and development of client marketing strategy. As an assistant professor, Greg specializes in teaching, research and service in the areas of marketing, marketing research and strategy. Dr. Dunn joined MMGY/Ypartnership and USF after acquiring more than 25 years of experience in various industry disciplines working in both management and marketing positions for respected organizations such as the Sea Island Company, The Boca Raton Resort and Club, The Greenbrier, Radisson, Sea Palms Resort, the Walt Disney Company® and Norwegian Cruise Lines. His background includes contracting and leadership of a diverse range of research and strategy projects for top hospitality, gaming and tourism clients such as Disney Parks & Resorts, WMS Gaming, Delaware North Company, Preferred Hotel Group, Interval International, Spectrum Gaming, U.S. Travel, Destination Hotels & Resorts and tourism and gaming boards such as Russia, Honduras, Bahamas, Curacao, Aruba, Barbados, Italy, Thailand, Mexico, Dominican Republic, Canada, Florida, New Hampshire, Connecticut, Oklahoma, Hawaii, Oregon, Savannah, Denver, New Orleans, Orlando, Napa Valley and Miami. Dr. Dunn has also been the co-author of the MMGY/Harrison Group Portrait of American Travelers, WMS Gaming/Ypartnership Active Gambler Profile, MMGY/U.S. Travel Association Travelhorizons, Ypartnership/Yankelovich Partners National Travel Monitor and the Ypartnership Portrait of Affluent Travelers series and has published numerous articles in the areas of marketing and strategy in both academic and professional journals such as the Journal of Travel and Tourism Marketing, UNLV Gaming Research & Review Journal, Hotel and Motel Management and Casino Management.