

Place Your Bet III

Who Gambles at New England's Casinos and Racinos?

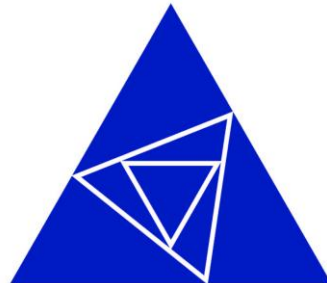
NEW ENGLAND GAMING RESEARCH PROJECT

4th Biennial New England Gaming Behavior Survey



Prepared

By



CENTER FOR POLICY ANALYSIS
UNIVERSITY OF MASSACHUSETTS
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UNIVERSITY OF MASSACHUSETTS DARTMOUTH CENTER FOR POLICY ANALYSIS

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1.00 INTRODUCTION

The U.S. gaming market is usually divided into six different segments consisting of charitable gaming,¹ pari-mutuel wagering,² state lotteries,³ commercial casinos, racetrack casinos, and tribal casinos. Currently, 47 states and the District of Columbia allow charitable gaming, 41 states allow pari-mutuel wagering, 41 states and the District of Columbia have lotteries, 14 states license commercial casinos,⁴ 13 states have licensed racetrack casinos and slot parlors ("racinos"),⁵ and 28 states have Class II or Class III tribal casinos. Nevada was the first state to legalize casino gambling in 1931 and it was not until 1976 that New Jersey became the second state to legalize casinos in Atlantic City. However, growth in the U.S. gaming market accelerated a decade later when the federal Indian Gaming Regulatory Act (IGRA) was passed in 1988 and states other than Nevada and New Jersey began to legalize commercial casinos and racinos.⁶

There are currently 562 federally-recognized Indian tribes. At present, 230 of these tribes have negotiated compacts with 24 states to establish 431 Class III gaming operations. Native American casinos had GGR of \$26.5 billion in 2008.⁷ There are 9 federally-recognized Indian tribes in New England, although only two of the tribes – the Mashantucket Pequot Tribe and the Mohegan Tribe -- currently operate Class III gaming facilities in Connecticut. The two tribes operate the only full-scale resort casinos in New England, which in calendar year 2009 had combined gross gaming revenues of \$2.1 billion. The Mashantucket Pequot's Foxwoods Resort Casino is now the largest casino in North America, while the Mohegan Tribe's Mohegan Sun Casino is the second largest casino in North America in terms of gaming positions.

Since 1989, however, 11 states have also legalized commercial casinos, including South Dakota (1989), Iowa (1989), Colorado (1990), Illinois (1990), Mississippi (1990), Louisiana (1991), Missouri (1993), Indiana (1993), Michigan (1996), Kansas (2007), and Ohio (2010).⁸ In 2009, these 13 states had 449 operating commercial casinos with 178 of the casinos operating outside the traditional venues of Nevada and New Jersey. In 2009, commercial casinos had combined gross gaming revenues of \$30.7 billion.⁹

Racetrack casinos – or racinos -- are an even more recent development in the nation's gaming market. In 1992, Rhode Island was the first state to authorize and operate racinos at Twin River Casino and Newport Grand Slots. Rhode Island was soon followed by Delaware (1994), West Virginia (1994),

¹ For example, bingo and raffles.

² Greyhound racing, thoroughbred horse racing, quarter horse racing, harness racing, and jai-alai, including simulcast and off-track betting.

³ Instant tickets, lotto games, keno, and video lottery terminals.

⁴ Ohio approved the licensing of four urban casinos in the state, although none of them are currently operating at this time.

⁵ Maryland has authorized up to six racetrack casinos and slot parlors, although only two have been licensed and are operating at this time.

⁶ Although commercial casinos and Native American casinos are similar from an economic and operational standpoint, the statutory basis of their existence is different and this distinction has numerous ramifications for the states' regulatory and taxing authority.

⁷ Alan Meister, *Indian Gaming Industry Report, 2009-2010* (Newton, Massachusetts: Casino City Press, 2009), pp. 13-21.

⁸ The years identify dates when legislation was passed legalizing commercial casinos, although in most cases the first casino did not begin operations until one to three years later. This list includes states with land-based, riverboat, and dockside casinos.

⁹ American Gaming Association, *2010 State of the States: The AGA Survey of Casino Entertainment* (Washington, D.C., 2010), p. 5.



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Iowa (1994), Louisiana (1994), and New Mexico (1997), and more recently, by New York (2001), Oklahoma (2004), Maine (2005), Pennsylvania (2004), and Maryland (2008).¹⁰ There are currently 42 racetrack casinos and slot parlors operating in 11 states.¹¹ In 2008, racinos had combined gross gaming revenues of \$6.0 billion.

Given the comparatively recent expansion of casino gambling in the United States, gambling studies is a relatively new field of social scientific inquiry.¹² Consequently, policymakers, the general public, and even many scholars are often unfamiliar with the complexities and nuances of gaming-related issues and, most particularly the differences between destination resort casinos and convenience gambling facilities. There is often a tendency to view "gambling" as one large undifferentiated market with uni-dimensional behavior patterns and demographics that can be extrapolated from one market niche to another or from one political jurisdiction to another without qualification. More specifically, casinos, racinos, and lotteries are often viewed as generic (fiscal and economic) equivalents by public policymakers, regardless of whether they are land-based resorts, riverboat, dockside, or racetrack casinos. In fact, differences within the casino market have significant implications for public policy, especially for state fiscal, economic development, and social policies.

The New England Gaming Research Project was launched by the Center for Policy Analysis at the University of Massachusetts Dartmouth with the February 2004 release of its first annual *New England Casino Gaming Update*. The *Project's* purpose is to provide policymakers, the general public, and the media with independent and objective research on the economic and fiscal impacts of gaming in the New England region, including information on the gaming behavior of New England residents.

The *New England Gaming Behavior Survey* is conducted every two years to complement and expand upon the information reported in the annual *New England Casino Gaming Update*. The *New England Gaming Behavior Survey* is a random sample telephone survey of residents in Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island. The overall survey is designed to measure the propensity to gamble among New England residents, to identify the demographic characteristics of casino and racino gamblers, as well as the types of games played by casino visitors, and to identify other patterns in the gambling behavior of the five states' residents.¹³

The 4th New England Gaming Behavior Survey was conducted from January 5, 2011 through February 10, 2011 using a survey instrument developed by research staff at the Center for Policy Analysis (see Appendix B). The survey generated a total of 3,839 respondents distributed among the five New England states included in the survey. The margin of error at a 95% confidence interval is different for the state-level sub-samples: Connecticut = +/- 3.5%, Maine = +/- 4.9%, Massachusetts = +/- 2.8%, New Hampshire = +/- 4.9% and Rhode Island = +/- 3.1%.¹⁴

¹⁰ The years identify dates when legislation was passed legalizing commercial casinos, although in most cases the first casino did not begin operations until one to three years later.

¹¹ These numbers do not include Maryland, which has not yet licensed any of the authorized gaming facilities.

¹² The leading academic journals in this field are the *Journal of Gambling Studies* and the *Gaming Law Review and Economics*. However, scholarly research on various aspects of gambling are now published in journals of economics, economic development, sociology, political science, psychology, travel and tourism, and public health.

¹³ A more detailed explanation of the Survey's methodology can be found in Appendix A.

¹⁴ This means that if a question from the survey was asked 100 times, then 95 of those times the percentage of people giving a particular answer to the question would be within the margin of error reported for each state on the questions asked of that state's residents in this poll.



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Place Your Bet III is the third public release of findings from the Project's 4th *New England Gaming Behavior Survey*. The analysis focuses on the casino and racino markets in New England, including:

- How many people gamble and what types of gambling interest them?
- Do different people gamble at destination casinos as opposed to slot parlors¹⁵ and racinos?¹⁶
- What are the incomes and demographics of destination casino, slot parlor, and racino patrons?
- What attracts patrons to a destination casino, slot parlor, or racino?
- How often does the average patron visit a destination casino, slot parlor, or racino?
- How far will patrons drive to visit a casino and are there differences between those who visit a destination casino, slot parlor, or racino?

¹⁵ Slot parlors offer slot machines or video lottery terminals, but they do not offer table games (e.g., poker, roulette, black jack, baccarat, etc.). Slot parlors generally do not offer the same range of non-gambling amenities as a resort casino, such as a luxury hotel, gourmet dining, retail outlets, and entertainment venues.

¹⁶ Racinos are slot parlors located at parimutuel facilities, such as greyhound racing parks, horse racing tracks, or jai alai frontons.



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2.00 PROPENSITY TO GAMBLE: RESPONDENTS WHO HAVE PARTICIPATED IN SOME FORM OF GAMBLING IN THE LAST 12 MONTHS

A random sample of 3,839 Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island residents was asked the following question:

“Did you participate in any of the following forms of gambling in the last 12 months? How about: Scratch Tickets, Other Lottery Games such as Megabucks or Powerball, Keno, Casino Gambling, Wagered on a Dog or Horse Race, Bingo, Wagered over the Internet, Poker, Sports Betting – yes/no/don’t know/refused.” (Overall margin of error +/-1.6%).

2.10 PROPENSITY TO PARTICIPATE IN DIFFERENT FORMS OF GAMBLING BY STATE

- Half of the residents (50%) in the five states surveyed have participated in some form of legal gambling in the last 12 months. The most frequent form of gambling among the residents of all five states is the lottery, including both lotto tickets (38%) and scratch tickets (35%), followed by casino gambling (25%). Smaller percentages of residents in the five state surveyed report gambling on keno (8%), poker (7%), bingo (5%), sports betting (4%), dog or horse racing (2%), or the Internet (1%) in the last twelve months (see Table 1).
- In terms of gambling by state, over half the residents in Massachusetts (56%) and Rhode Island (52%) have participated in some type of gambling in the last 12 months. Forty-five percent (45%) of residents in Connecticut, 45 percent of residents in Maine, and 42 percent of residents in New Hampshire have participated in some type of gambling in the last 12 months (see Table 1).
- Casino gambling is the third most frequent form of gambling among the five states’ residents with Rhode Island (29%) reporting the highest propensity to casino gamble, followed by Connecticut (26%) and Massachusetts (26%), Maine (20%), and New Hampshire (13%) (see Table 1).

Table 1

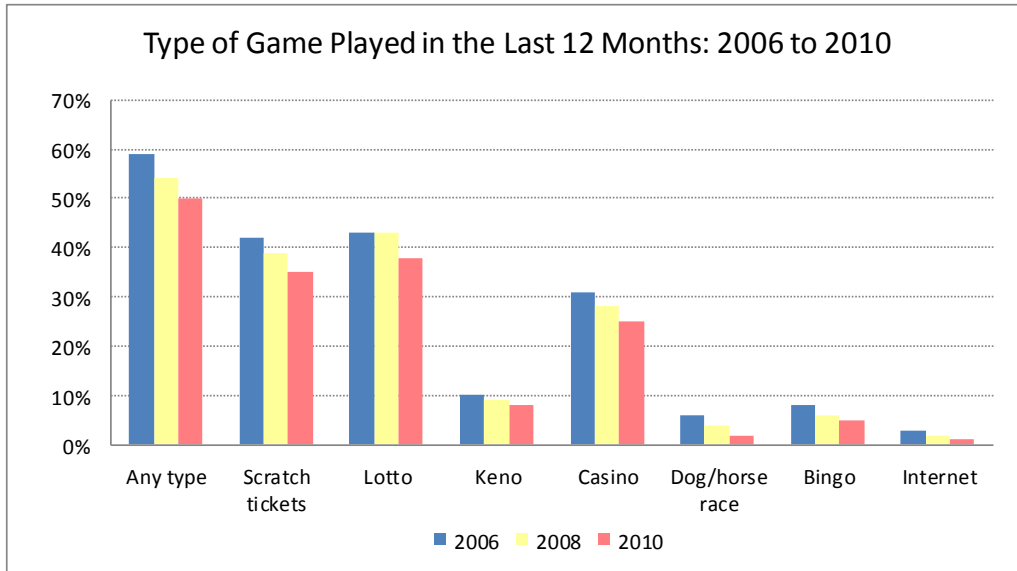
Type of Game Played in the Last Twelve Months By State						
	All Resp.	CT	ME	MA	NH	RI
Any type	50%	45%	45%	56%	42%	52%
Scratch tickets	35%	27%	29%	43%	32%	34%
Lotto	38%	33%	31%	43%	35%	42%
Keno	8%	2%	3%	16%	2%	8%
Casino	25%	26%	20%	26%	13%	29%
Dog/horse race	2%	2%	3%	2%	1%	3%
Bingo	5%	4%	2%	6%	5%	5%
Internet	1%	1%	0%	2%	1%	1%
Poker	7%	5%	11%	10%	6%	5%
Sports betting	4%	2%	5%	6%	2%	3%



2.20 PROPENSITY TO PARTICIPATE IN DIFFERENT FORMS OF GAMBLING: HISTORICAL TRENDS

- The overall propensity to gamble declined from 59 percent in 2006 to 50 percent in 2010 (see Figure 1). The propensity to gamble by type of game played also declined during this period.¹⁷

Figure 1



¹⁷ Some of the decline can be attributed to the addition of the state of Connecticut to the survey sample in 2008, a state which has lower levels of gambling in comparison to residents in Massachusetts and Rhode Island, although the propensity to gamble has continued to trend downward since that time.



3.00 FOXWOODS RESORT CASINO AND MOHEGAN SUN CASINO

3.10 PERCENTAGE OF RESIDENTS WHO HAVE VISITED FOXWOODS RESORT CASINO OR MOHEGAN SUN CASINO IN THE LAST 12 MONTHS AND THE FREQUENCY THEY VISIT

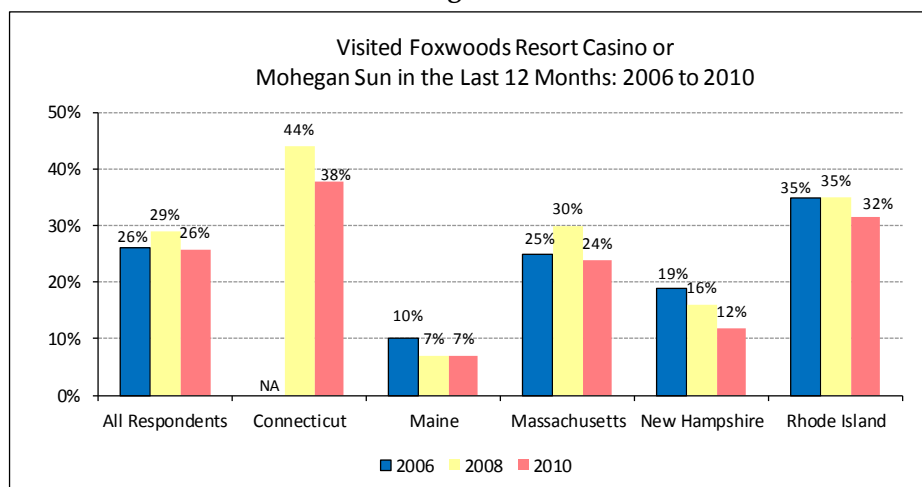
A random sample of 3,839 Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island residents was asked the following question:

“During the last 12 months, how many times did you visit Foxwoods Resort Casino Resort Casino in Connecticut?” and “During the last 12 months, how many times did you visit Mohegan Sun Casino in Connecticut?” (Overall margin of error +/-1.6%).

3.11 VISITATION PATTERNS AT FOXWOODS RESORT CASINO & MOHEGAN SUN BY STATE¹⁸

- Twenty-six percent (26%) of residents in the five states surveyed report having visited Foxwoods Resort Casino or Mohegan Sun Casino at least once during the previous twelve months, which is unchanged from the 2006 Gaming Behavior Survey but a small decline from 2008 (see Figure 2).
- Connecticut respondents report the highest ratio of visitations to Foxwoods Resort Casino or Mohegan Sun, with 38 percent having visited Foxwoods Resort Casino or Mohegan Sun Casino in the last twelve months, followed by Rhode Island (32%), Massachusetts (24%), New Hampshire (12%), and Maine (7%) (see Figure 1).
- The percentage of Connecticut residents who visited Foxwoods Resort Casino or Mohegan Sun Casino declined from 44 percent in 2008 to 38 percent in 2010. The percentage of New Hampshire residents who visited these facilities also declined from 19 percent in 2008 to 12 percent in 2010.

Figure 2



¹⁸ Respondents 21 years of age and older.



3.12 VISITATION PATTERNS AT FOXWOODS RESORT CASINO & MOHEGAN SUN BY FACILITY

- Twenty percent (20%) of residents in the five states surveyed visited Foxwoods Resort Casino at least once during the previous twelve months, while 17 percent (17%) of all residents visited Mohegan Sun Casino at least once during the previous twelve months (see Table 2). The percentage of residents who visited Foxwoods Resort Casino declined by 3 percent from 2006, while the percentage who visited Mohegan Sun Casino increased by 4 percent over this period.
- In 2010, a higher percentage of Connecticut residents (35% vs. 20%) visited Mohegan Sun Casino in comparison to Foxwoods Resort Casino, while a higher percentage of residents in Maine (7% vs. 5%), Massachusetts (21% vs. 13%), New Hampshire (10% vs. 7%), and Rhode Island (28% vs. 17%) visited Foxwoods Resort Casino (see Table 2).
- The ratio of Connecticut residents who visited Foxwoods Resort Casino declined by 7 percentage points from 2008 to 2010. In addition, the percentage of Maine residents who visited Foxwoods Resort Casino declined by 1 percentage point from 2006 to 2010, while it declined by 1 percentage point among Massachusetts residents, by 7 percentage points among New Hampshire residents, and by 2 percentage points among Rhode Island residents (see Table 2).
- The percentage of Connecticut residents who visited Mohegan Sun declined by 3 percentage points from 2008 to 2010, while there was no change in visitation from 2006 to 2008 among the other states (see Table 2).

Table 2

Percent Visited Foxwoods Resort Casino or Mohegan Sun by State								
	% Visited Foxwoods Resort Casino				% Visited Mohegan Sun			
	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>% Change 06-10</u>	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>% Change 06-10</u>
All Respondents	23%	22%	20%	-3%	13%	19%	17%	4%
*Connecticut	NA	27%	20%	-7%	NA	38%	35%	-3%
Maine	8%	5%	7%	-1%	5%	4%	5%	0%
Massachusetts	22%	24%	21%	-1%	13%	18%	13%	0%
New Hampshire	17%	10%	10%	-7%	7%	11%	7%	0%
Rhode Island	30%	29%	28%	-2%	17%	17%	17%	0%

* Connecticut was not included in the 2006 survey.



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3.13 NUMBER OF UNIQUE VISITORS & AVERAGE VISITS PER YEAR TO FOXWOODS RESORT CASINO & MOHEGAN SUN CASINO BY STATE¹⁹

- In 2010, approximately 1.9 million New England residents from the five states surveyed visited Foxwoods Resort Casino and approximately 1.8 million residents visited Mohegan Sun Casino (see Table 3). The number of visitors to Foxwoods Resort Casino declined by 14 percent from 2008, while the number of visitors to Mohegan Sun declined by 16 percent.²⁰
- In 2010, an estimated 506,000 Connecticut residents visited Foxwoods Resort Casino and approximately 871,000 Connecticut residents visited Mohegan Sun Casino (see Table 3). The number of Connecticut visitors to Foxwoods Resort Casino declined by 26 percent from 2008 to 2010, while the number of Connecticut visitors to Mohegan Sun Casino declined by 9 percent.
- In 2010, approximately 65,000 Maine residents visited Foxwoods Resort Casino and approximately 46,000 Maine residents visited Mohegan Sun Casino (see Table 3). The number of Maine visitors to Foxwoods Resort Casino declined by 19 percent from 2006, while the number of Maine visitors to Mohegan Sun Casino increased by 6 percent.
- In 2010, approximately 1 million Massachusetts residents visited Foxwoods Resort Casino and approximately 638,000 Massachusetts residents visited Mohegan Sun Casino (see Table 3). The number of Massachusetts visitors to Foxwoods Resort Casino increased by 3 percent from 2006, while the number of visitors to Mohegan Sun Casino increased by 12 percent over this period, although both figures have declined since 2008.
- In 2010, approximately 91,000 New Hampshire residents visited Foxwoods Resort Casino and approximately 71,000 New Hampshire residents visited Mohegan Sun Casino (see Table 3). The number of New Hampshire visitors to Foxwoods Resort Casino declined by 41 percent from 2006, while the number of New Hampshire visitors to Mohegan Sun Casino increased by 6 percent over this period.
- In 2010, approximately 212,000 Rhode Island residents visited Foxwoods Resort Casino and approximately 132,000 Rhode Island residents visited Mohegan Sun Casino (see Table 3). The number of Rhode Island visitors to Foxwoods Resort Casino declined by 8 percent from 2006, while the number of visitors to Mohegan Sun Casino increased by 2 percent over this period.

¹⁹ This data measures the number of unique visitors to these facilities regardless of actual number of time they visit.

²⁰ Comparisons to 2006 data are not included because Connecticut was not included in the 2006 survey.



Table 3

Number of Visitors to Foxwoods Resort Casino and Mohegan Sun by State								
	Foxwoods Resort Casino				Mohegan Sun			
	2006	2008	2010	% Change 06-10	2006	2008	2010	% Change 06-10
*All Respondents	1,442,433	2,182,772	1,881,956	-14%	807,091	2,085,218	1,758,029	-16%
*Connecticut	NA	682,336	506,166	-26%	NA	960,325	871,310	-9%
Maine	80,074	49,134	64,762	-19%	43,413	39,307	46,118	6%
Massachusetts	976,579	1,133,564	1,008,734	3%	567,779	850,173	637,596	12%
New Hampshire	154,862	95,667	90,774	-41%	66,767	105,233	70,708	6%
Rhode Island	230,917	222,072	211,521	-8%	129,131	130,180	132,297	2%

* Comparison is to 2008 data because Connecticut was not included in the 2006 survey.

3.14 AVERAGE NUMBER OF VISITS

- The average annual number of visits to Foxwoods Resort Casino among residents of the five states surveyed increased by 5 percent from 2008 to 2010 and declined by 2 percent at Mohegan Sun over the same period (see Table 4).²¹

Table 4

Average Annual Number of Visits								
	Foxwoods Resort Casino				Mohegan Sun			
	2006	2008	2010	% Change 06-10	2006	2008	2010	% Change 06-10
*All Respondents	4.9	3.9	4.1	5%	3.5	4.1	4.0	-2%
*Connecticut	NA	5.2	3.4	-35%	NA	4.6	5.6	22%
Maine	2.1	1.4	3.3	58%	2.5	1.6	2.4	-3%
Massachusetts	4.9	3.3	3.1	-37%	3.6	2.7	3.0	-16%
New Hampshire	2.3	1.7	2.0	-14%	1.7	2.0	1.8	6%
Rhode Island	5.4	4.2	5.7	6%	3.6	3.0	3.0	-17%

* Comparison is to 2008 data because Connecticut was not included in the 2006 survey.

²¹ Comparisons to 2006 data are not included because Connecticut was not included in the 2006 survey.



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3.15 NUMBER OF VISITATIONS PER YEAR TO FOXWOODS RESORT CASINO & MOHEGAN SUN BY STATE²²

- Residents from Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island made approximately 6.5 million visits to Foxwoods Resort Casino and 7.5 million visits to Mohegan Sun Casino in the last 12 months (see Table 5). The number of visitations to Foxwoods Resort Casino declined by 23 percent from 2008 to 2010, while the number of visitations to Mohegan Sun Casino increased by 1 percent.²³
- Connecticut residents made approximately 1.7 million visits to Foxwoods Resort Casino and 4.9 million visits to Mohegan Sun Casino in the last 12 months (see Table 5). The number of visitations by Connecticut residents to Foxwoods Resort Casino declined by 51 percent from 2008, while the number of visitations to Mohegan Sun Casino increased by 11 percent.
- Maine residents made approximately 214,000 visits to Foxwoods Resort Casino and 112,000 visits to Mohegan Sun Casino in the last 12 months (see Table 5). The number of visitations by Maine residents to Foxwoods Resort Casino increased by 30 percent from 2006, while the number of visitations to Mohegan Sun Casino increased by 5 percent.
- Massachusetts residents made approximately 3.1 million visits to Foxwoods Resort Casino and 1.9 million visits to Mohegan Sun Casino in the last 12 months (see Table 5). The number of visitations by Massachusetts residents to Foxwoods Resort Casino declined by 35 percent from 2006, while the number of visitations to Mohegan Sun Casino declined by 7 percent.
- New Hampshire residents made approximately 179,000 visits to Foxwoods Resort Casino and 127,000 visits to Mohegan Sun Casino in the last 12 months (see Table 5). The number of visitations by New Hampshire residents to Foxwoods Resort Casino declined by 50 percent from 2006, while the number of visitations to Mohegan Sun Casino increased by 14 percent.
- Rhode Island residents made approximately 1.2 million visits to Foxwoods Resort Casino and 394,000 visits to Mohegan Sun Casino in the last 12 months (see Table 5). The number of visitations by Rhode Island residents to Foxwoods Resort Casino declined by 3 percent from 2006, while the number of visitations to Mohegan Sun Casino declined by 14 percent.

Table 5

Number of Visitations to Foxwoods Resort Casino and Mohegan Sun by State								
	Foxwoods Resort Casino				Mohegan Sun			
	2006	2008	2010	% Change 06-10	2006	2008	2010	% Change 06-10
*All Respondents	6,566,692	8,428,522	6,456,981	-23%	2,744,286	7,376,646	7,462,266	1%
*Connecticut	NA	3,527,677	1,720,964	-51%	NA	4,417,493	4,896,764	11%
Maine	164,952	67,314	214,362	30%	106,363	63,678	112,068	5%
Massachusetts	4,804,770	3,740,760	3,137,163	-35%	2,066,714	2,295,466	1,931,916	-7%
New Hampshire	354,635	157,850	178,824	-50%	111,501	214,676	127,274	14%
Rhode Island	1,242,336	934,921	1,205,668	-3%	459,708	385,332	394,244	-14%

* Comparison is to 2008 data because Connecticut was not included in the 2006 survey.

²² This data measures the total number of visits to these facilities, as opposed to the previous section that measured the number of unique visitors.

²³ Comparisons to 2006 data are not included because Connecticut was not included in the 2006 survey.



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3.16 FREQUENCY OF VISITATION TO FOXWOODS RESORT CASINO & MOHEGAN SUN BY STATE

- Forty-five percent (44%) of the individuals who reported visiting Foxwoods Resort Casino in the last 12 months visited one time, while 84 percent visited four times or less (Table 6).
- Forty-three percent (43%) of the individuals who reported visiting Mohegan Sun in the last 12 months visited one time, while 82 percent visited four times or less (Table 6).

Table 6

Number of Trips Per Year to Foxwoods Resort Casino and Mohegan Sun, 2010										
	<u>Foxwoods</u>					<u>Mohegan Sun</u>				
	<u>One Time</u>	<u>Two Times</u>	<u>Three Times</u>	<u>Four Times</u>	<u>Five or More Times</u>	<u>One Time</u>	<u>Two Times</u>	<u>Three Times</u>	<u>Four Times</u>	<u>Five or More Times</u>
All Respondents	44%	23%	10%	7%	16%	43%	21%	12%	6%	18%
Connecticut	46%	25%	12%	6%	11%	36%	18%	17%	6%	23%
Maine	37%	24%	2%	2%	35%	33%	5%	54%	3%	5%
Massachusetts	48%	19%	10%	9%	14%	41%	36%	5%	2%	16%
New Hampshire	57%	21%	10%	4%	8%	67%	17%	7%	5%	4%
Rhode Island	39%	24%	9%	7%	21%	51%	15%	6%	8%	20%

Note: Small N values for New Hampshire and Maine.



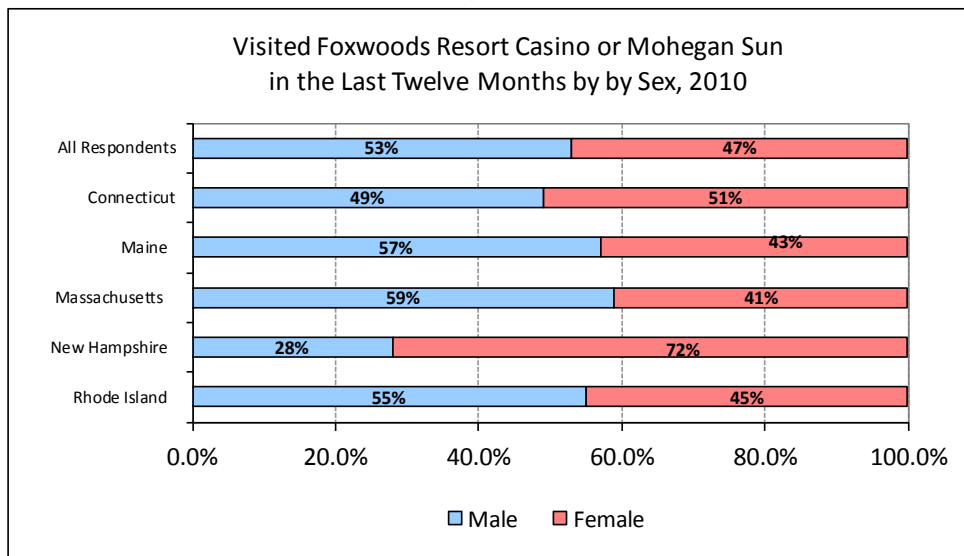
3.20 DEMOGRAPHIC PROFILE OF PERSONS WHO VISITED FOXWOODS RESORT CASINO OR MOHEGAN SUN CASINO IN THE LAST 12 MONTHS

Respondents from each state were asked to indicate their sex, age, educational attainment, and annual family income.

3.21 FOXWOODS RESORT CASINO/MOHEGAN SUN CASINO VISITORS BY SEX

- Fifty-three percent (53%) of the visitors to Foxwoods Resort Casino and Mohegan Sun Casino in the five states surveyed are men and 47 percent are women (see Figure 3).
- A majority of visitors to Foxwoods Resort Casino and Mohegan Sun from Massachusetts (59%), Maine (57%), and Rhode Island (55%) are men, while less than a majority of residents from Connecticut (49%) and New Hampshire (28%) are men.

Figure 3



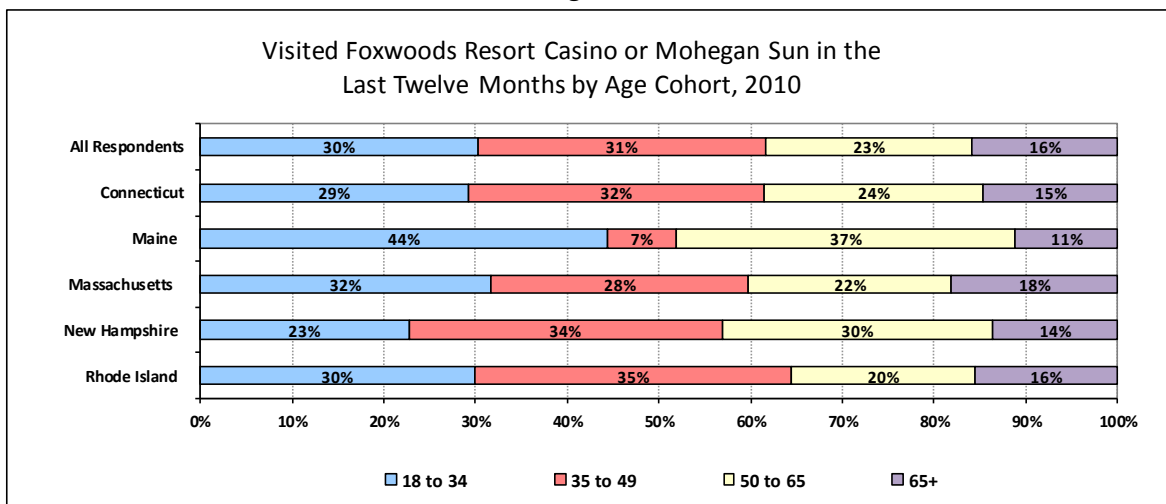
Note: Small number of respondents for Maine and New Hampshire. Conclusions should be made with caution.



3.22 FOXWOODS RESORT CASINO/MOHEGAN SUN CASINO VISITORS BY AGE COHORT

- Thirty-nine percent (39%) of the visitors to Foxwoods Resort Casino and Mohegan Sun Casino from the five states surveyed are age 50 or older – 48 percent in Maine, 44 percent in New Hampshire, 40 percent in Massachusetts, 39 percent in Connecticut, and 36 percent in Rhode Island are age 40 or older (see Figure 4).
- Sixteen percent (16%) of the visitors to Foxwoods Resort Casino and Mohegan Sun Casino from the five states surveyed are age 65 and older – 18 percent in Massachusetts, 16 percent in Rhode Island, 16 percent in Rhode Island, 14 percent in New Hampshire, and 11 percent in Maine are age 65 and older (see Figure 4) .
- Thirty percent (30%) of visitors to Foxwoods Resort Casino and Mohegan Sun Casino from the five states surveyed are age 34 or under – 44 percent in Maine, 32 percent in Massachusetts, 30 percent in Rhode Island, 29 percent in Connecticut, and 23 percent in New Hampshire are under the age of 35 (see Figure 4).

Figure 4



Note: Small number of respondents for Maine and New Hampshire. Conclusions should be made with caution.

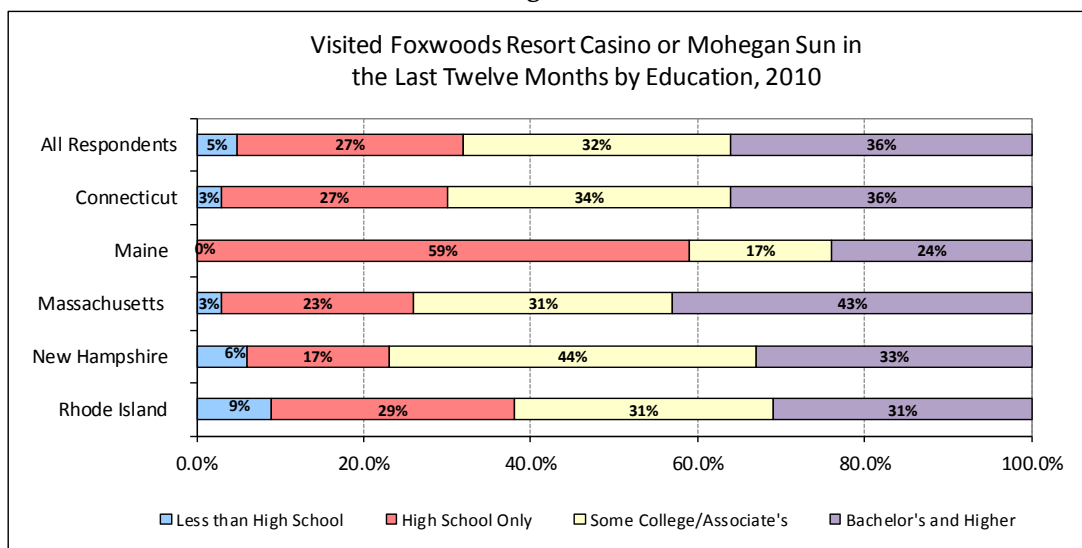


Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

3.23 FOXWOODS RESORT CASINO/MOHEGAN SUN CASINO VISITORS BY EDUCATION

- In the five states surveyed, 36 percent of those who visited Foxwoods Resort Casino or Mohegan Sun Casino in the last 12 months had a bachelor's degree or higher – 43 percent in Massachusetts, 36 percent in Connecticut, 33 percent in New Hampshire, 31 percent in Rhode Island, and 24 percent in Maine had a bachelor's degree or higher (see Figure 5).
- In the five states surveyed, 68 percent of the individuals who visited Foxwoods Resort Casino or Mohegan Sun in the last 12 months had at least some college experience, an associate's degree, or a bachelor's degree, or higher – 77 percent in New Hampshire, 74 percent in Massachusetts, 70 percent in Connecticut, 62 percent in Rhode Island, and 41 percent in Maine had at least some college experience, an associate's degree, or a bachelor's degree, or higher (see Figure 5).
- In the five states surveyed, only 5 percent of the individuals who visited Foxwoods Resort Casino or Mohegan Sun Casino in the last 12 months had less than a high school diploma – 9 percent in Rhode Island, 6 percent in New Hampshire, 3 percent in Connecticut, 3 percent in Massachusetts, and 0 percent in Maine had less than a high school diploma (see Figure 5).

Figure 5



Note: Small number of respondents for Maine and New Hampshire. Conclusions should be made with caution.

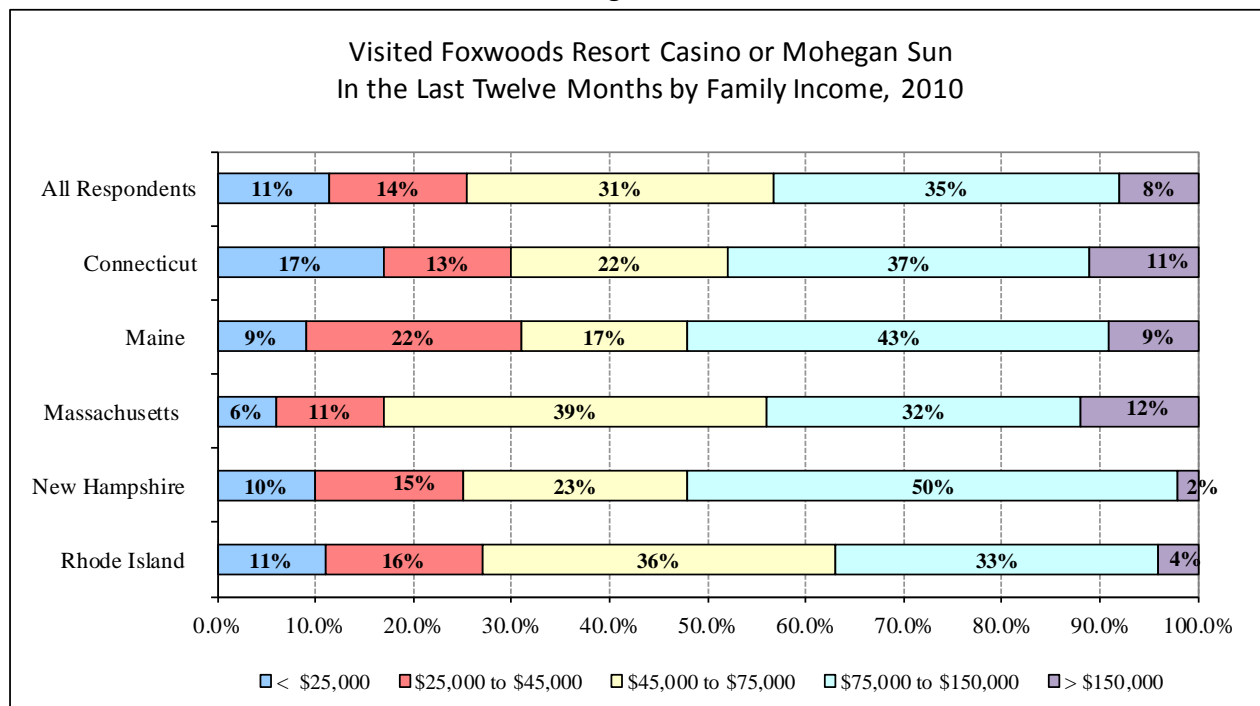


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3.24 FOXWOODS RESORT CASINO/MOHEGAN SUN CASINO VISITORS BY FAMILY INCOME

- Nearly three quarters (74%) of visitors in the five states surveyed to Foxwoods Resort Casino or Mohegan Sun Casino in the last 12 months had annual family incomes of \$45,000 or higher – 83 percent in Massachusetts, 75 percent in New Hampshire, 73 percent in Rhode Island, 70 percent in Connecticut, and 69 percent in Maine had annual family incomes of \$45,000 or higher (see Figure 6).
- In the five states surveyed, a quarter (25%) of the individuals who visited Foxwoods Resort Casino or Mohegan Sun in the last 12 months had annual family incomes of less than \$45,000 – 31 percent in Maine, 30 percent in Connecticut, 27 percent in Rhode Island, 25 percent in New Hampshire, and 17 percent in Massachusetts had annual family incomes of less than \$45,000 (see Figure 6).
- In the five states surveyed, eleven percent (11%) of the individuals who visited Foxwoods Resort Casino or Mohegan Sun in the last 12 months had annual family incomes of less than \$25,000 – 17 percent in Connecticut, 11 percent in Rhode Island, 10 percent in New Hampshire, 9 percent in Maine, and 6 percent in Massachusetts had annual family incomes of less than \$25,000 (see Figure 6).

Figure 6



Note: Small number of respondents for Maine and New Hampshire. Conclusions should be made with caution.



3.30 PERCENTAGE OF RESIDENTS WHO VISITED FOXWOODS RESORT CASINO OR MOHEGAN SUN CASINO IN THE LAST 12 MONTHS WHO SPENT MONEY ON GAMBLING AND NON-GAMBLING ACTIVITIES AT THE CASINOS

Respondents from the five states surveyed who reported that they visited Foxwoods Resort Casino or Mohegan Sun in the last 12 months were also asked: "On your last visit to Foxwoods Resort Casino. Mohegan Sun did you spend money on any of the following items? Food, hotel or lodging, retail purchases, other entertainment, gambling, spa, and golf – yes/no."

- Most visitors to Foxwoods Resort Casino (87%) and Mohegan Sun Casino (78%) spend money on gambling, although 13 percent of those who visited Foxwoods Resort Casino in the last 12 months did not gamble, while 22 percent of those who visited Mohegan Sun Casino did not gamble (see Table 7).
- Ninety-two percent (92%) of Foxwoods Resort Casino's visitors spent money on food, while 28 percent spent money on lodging, 25 percent spent money on retail, 39 percent spent money on other types of entertainment such as shows, dancing, and concerts, 10 percent spent money on spa services, and 3 percent spent money on golf (see Table 7).
- Ninety-two percent (92%) of Mohegan Sun's visitors spent money on food, while 18 percent spent money on lodging, 28 percent spent money on retail, 48 percent spent money on other types of entertainment, and 6 percent spent money on spa services (see Table 7).

Table 7

Percent Patrons Who Spent Money By Category, 2010							
Foxwoods Resort Casino							
	% Food	% Lodging	% Retail	% Other	% Gambling	Spa	Golf
All Respondents	92%	28%	25%	39%	87%	10%	3%
Connecticut	88%	21%	32%	48%	65%	5%	1%
Maine	96%	70%	24%	59%	89%	3%	0%
Massachusetts	92%	33%	24%	34%	95%	16%	7%
New Hampshire	97%	47%	34%	33%	96%	5%	4%
Rhode Island	94%	20%	19%	38%	90%	9%	1%
Mohegan Sun							
	% Food	% Lodging	% Retail	% Other	% Gambling	Spa	Golf
All Respondents	92%	18%	28%	48%	78%	6%	NA
Connecticut	93%	19%	37%	54%	71%	7%	NA
Maine	97%	20%	33%	65%	100%	0%	NA
Massachusetts	94%	23%	24%	32%	93%	7%	NA
New Hampshire	94%	34%	24%	42%	74%	13%	NA
Rhode Island	90%	11%	19%	53%	72%	1%	NA



3.40 CASINO GAMBLERS WILL TRAVEL FURTHER TO ACCESS THE TABLE GAMES, NON-GAMBLING AMENITIES AND TO EXPERIENCE THE PHYSICAL ATTRACTIVENESS AND GENERAL ATMOSPHERE OF A RESORT CASINO THAN A CONVENIENCE GAMBLING (SLOT PARLOR/RACINO) FACILITY.

The town or city of residence for all 3,819 respondents was determined by asking them “What is your zip code?” The drive-time for each person visiting the two casinos in the last twelve months was determined using Google Maps.

- Sixty-five percent (65%) of the individuals who visited Foxwoods Resort Casino from Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island traveled more than 60 minutes to get to the casino, while 36 percent traveled more than 90 minutes (see Table 8). Travel times changed only slightly from 2008 to 2010.
- Seventy-one percent (71%) of the individuals who visited Mohegan Sun from Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island traveled more than 60 minutes to get to the casino, while 29 percent traveled more than 90 minutes (see Table 8). Travel times changed only slightly from 2008 to 2010.

Table 8

Visitor's Travel Time						
Drive Time Band	Foxwoods Resort Casino			Mohegan Sun		
	2008	2010	% Change	2008	2010	% Change
1 to 30 minutes	6%	6%	0%	7%	9%	2%
31 to 60 minutes	25%	30%	5%	17%	20%	3%
61 to 90 minutes	35%	29%	-6%	44%	42%	-2%
91 to 120 minutes	21%	22%	1%	20%	18%	-2%
> 2 hours	13%	14%	1%	12%	11%	-1%

* Note: Data for 2006 not presented because Connecticut was not included in the 2006 survey.



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- Residents in all five states surveyed also report that they have visited resort casinos in other jurisdictions within the last twelve months, including Atlantic City (2%), Las Vegas (4%), and other areas, such as the Caribbean, Canada, and Europe (4%) (see Table 9).

Table 9

Percent Who Have Visited Other Casinos			
	Atlantic City	Las Vegas	Other Areas
All Respondents	2%	4%	4%
Connecticut	3%	3%	3%
Maine	1%	4%	2%
Massachusetts	2%	5%	5%
New Hampshire	1%	4%	3%
Rhode Island	2%	4%	4%

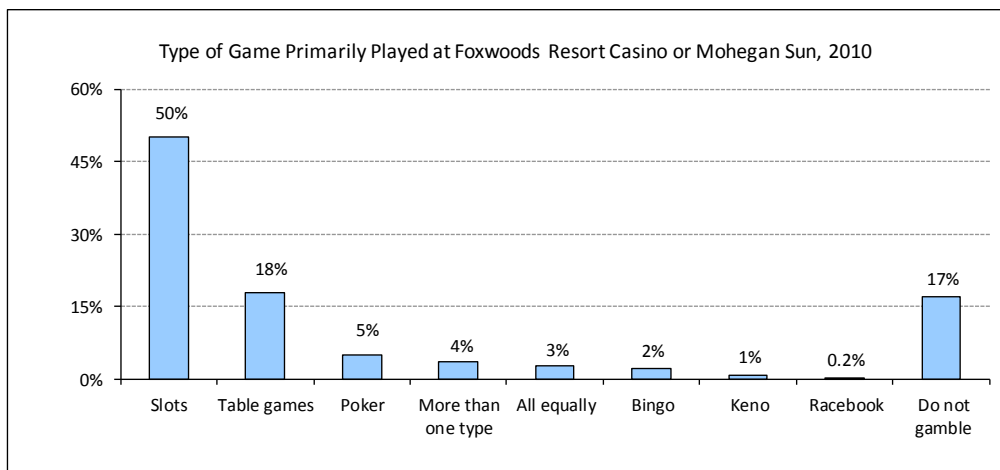
3.50 WHO PLAYS SLOT MACHINES AND WHO PLAYS TABLE GAMES AT FOXWOODS RESORT CASINO AND MOHEGAN SUN CASINO?

Respondents who reported that they had gambled at Foxwoods Resort Casino or Mohegan Sun Casino in the last 12 months were asked: “Of the games you do play, what do you play most often, or do you play them all equally?”

3.51 TYPE OF GAME PLAYED – ALL RESPONDENTS, 2010

- Among individuals who gambled at Foxwoods Resort Casino or Mohegan Sun Casino in the last 12 months, 50 percent report that they primarily play slot machines, 18 percent primarily play table games, 5 percent play poker in the poker room, 4 percent play a different game at each facility, 3 percent play all games equally, 2 percent play bingo, 1 percent play Keno, 0.2 percent play in the race book, and 17 percent do not gamble (see Figure 7).

Figure 7



3.52 TYPE OF GAME PRIMARILY PLAYED BY SEX, 2010

- Women (73%) are much more likely than men (45%) to report that they primarily play slot machines at Foxwoods Resort Casino and Mohegan Sun Casino (see Table 10). In fact, 62 percent of slot machine players at Foxwoods Resort Casino and Mohegan Sun Casino are female (see Table 11).²⁴
- Men (35%) are much more likely than women (7%) to report that they primarily play table games at Foxwoods Resort Casino and Mohegan Sun Casino (see Table 10). In fact, 83 percent of table game players at Foxwoods Resort Casino and Mohegan Sun Casino are men (see Table 11).
- Equal percentages of men (20%) and women (20%) report that they do not gamble at Foxwoods Resort Casino and Mohegan Sun Casino (see Table 10).

Table 10

Slot/Table Game Play by Sex				
	Slots	Table Games	Does Not Gamble	Total
All Respondents	59%	21%	20%	100%
Male	45%	35%	20%	100%
Female	73%	7%	20%	100%

Table 11

Type of Game Played By Sex			
	Slots	Table Games	Do Not Gamble
Male	38%	83%	50%
Female	62%	17%	50%
Total	100%	100%	100%

²⁴ The percentage who play slots, table games, or do not gamble in tables 3.52 to 3.55 are based on players who play these games and do not include keno players, bingo players, etc. Therefore, these percentages do not equal the totals in Figure 7.



3.53 TYPE OF GAME PLAYED BY AGE, 2010

- The older the age cohort, the larger the percentage who report that they primarily play slot machines at Foxwoods Resort Casino and Mohegan Sun Casino (18-34 = 46%, 35-50 = 56%, 50 to 64 = 66%), 65 and older = 75%) (see Table 12).
- Conversely, table games are more popular among the young (18-34 = 29%, 65 and older=9%) (see Table 12). In fact, 38 percent of the table games players at Foxwoods Resort Casino and Mohegan Sun Casino are under the age of 35 and 73 percent are under the age of 50 (see Table 13).
- The percentage of respondents who report that they do not gamble declines with age (18-34 = 35%, 65 and older =13%). In fact, 20 percent of visitors to Foxwoods Resort Casino and Mohegan Sun do not gamble, compared to 15 percent of visitors age 65 and older (see Table 13). The highest percentage of non-gamblers at Foxwoods Resort Casino and Mohegan Sun is among the 40 to 49 age cohort (30%), followed by the 30 to 39 (21%) and 50 to 59 (18%) year age cohorts (see Table 13).

Table 12

Slot/Table Game Play by Age Cohort				
	Slots	Table Games	Does Not Gamble	Total
All Respondents	59%	21%	20%	100%
18 to 34	46%	29%	25%	100%
35 to 50	56%	24%	20%	100%
50 to 64	66%	17%	17%	100%
65+	75%	9%	15%	100%

Table 13

Type of Game Played By Age			
	Slots	Table Games	Do Not Gamble
18 to 34	22%	38%	35%
35 to 50	30%	35%	32%
50 to 64	27%	19%	21%
65+	21%	7%	13%
Total	100%	100%	100%



3.54 TYPE OF GAME PLAYED BY EDUCATION, 2010

- The lower a respondent's level of education, the more likely they are to report that they primarily play slot machines at Foxwoods Resort Casino and Mohegan Sun Casino (<high school diploma = 79%, bachelor's degree or higher = 55%) (see Table 14).
- The higher a respondent's level of education, the more likely they are to report that they primarily play table games at Foxwoods Resort Casino and Mohegan Sun Casino (less than high school diploma = 12%, bachelor's degree or higher = 23%) (see Table 14). In fact, 40 percent of the table games players have a bachelor's degree or higher (see Table 15).
- Respondents with a bachelor's degree or higher (22%) are most likely to report that they do not gamble when they visit either of the casinos, followed by respondents with only a high school diploma (20%) and some college experience or an Associate's degree (19%) (see Table 14). Forty percent (40%) of respondents who report that they do not gamble at Foxwoods Resort Casino or Mohegan Sun Casino have a bachelor's degree or higher (see Table 15).

Table 14

Slot/Table Game Play by Education				
	Slots	Table Games	Does Not Gamble	Total
All Respondents	59%	21%	20%	100%
< High School	79%	12%	9%	100%
High School Only	59%	21%	20%	100%
Some College/Assoc.	61%	20%	19%	100%
Bachelor's +	55%	23%	22%	100%

Table 15

Type of Game Played By Education			
	Slots	Table Games	Do Not Gamble
< High School	5%	2%	2%
High School Only	28%	28%	29%
Some College/Assoc.	33%	30%	30%
Bachelor's +	34%	40%	39%
Total	100%	100%	100%



3.55 TYPE OF GAME PLAYED BY INCOME, 2010

- Respondents with family incomes between \$25K and \$45K (74%) are most likely to primarily play slot machines at Foxwoods Resort Casino and Mohegan Sun Casino, while the higher a person's income, the more likely they are to report that they primarily play table games (<\$25K = 14%, >\$150K = 32%) (see Table 16).
- Eighty-six percent (86%) of slot machine players at Foxwoods Resort Casino and Mohegan Sun have annual family incomes of \$45,000 or higher, while only 14 percent of those who play slot machines have a family income below \$45,000 (see Table 17).

Table 16

Slot/Table Game Play by Family Income				
	Slots	Table Games	Does Not Gamble	Total
All Respondents	59%	21%	20%	100%
< \$25,000	47%	14%	39%	100%
\$25,000 to \$45,000	74%	12%	14%	100%
\$45,000 to \$75,000	57%	27%	16%	100%
\$75,000 to \$150,000	60%	21%	19%	100%
\$150,000+	44%	32%	24%	100%

Table 17

Type of Game Played By Family Income			
	Slots	Table Games	Do Not Gamble
< \$25,000	9%	7%	22%
\$25,000 to \$45,000	17%	7%	10%
\$45,000 to \$75,000	32%	40%	25%
\$75,000 to \$150,000	36%	35%	33%
\$150,000+	6%	11%	10%
Total	100%	100%	100%



4.00 TWIN RIVER CASINO AND NEWPORT GRAND SLOTS

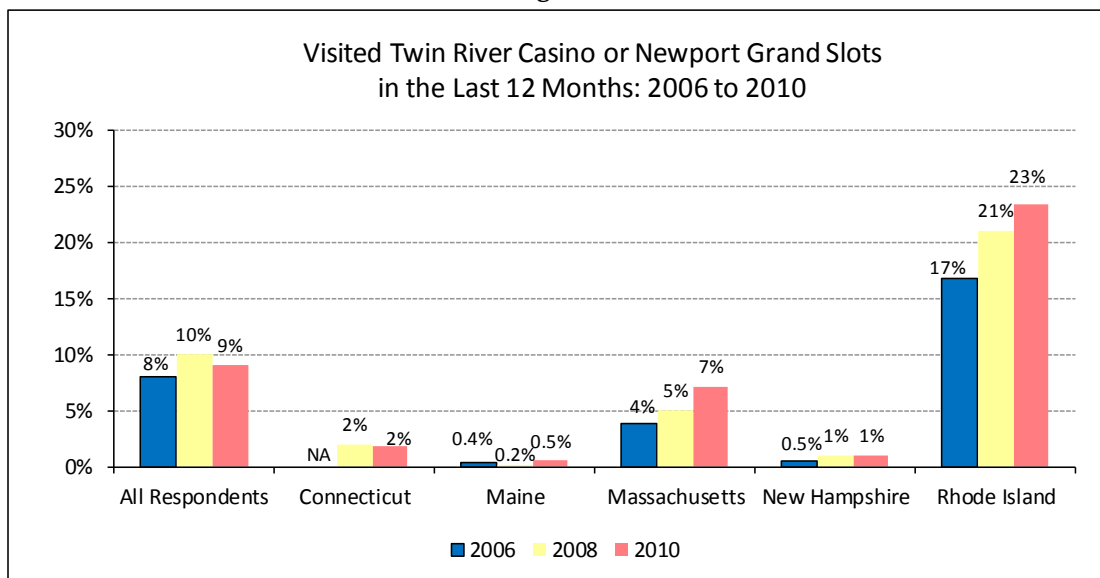
4.10 PERCENTAGE WHO VISITED TWIN RIVER CASINO OR NEWPORT GRAND SLOTS IN THE LAST 12 MONTHS AND THE FREQUENCY THEY VISIT

A random sample of 3,839 Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island residents was asked the following two questions: "During the last 12 months, how many times did you visit Twin River Casino in Lincoln, Rhode Island?" and "During the last 12 months, how many times did you visit Newport Grand Slots in Newport, Rhode Island?" (Overall margin of error +/-1.6%).

4.11 VISITATION PATTERNS AT TWIN RIVER CASINO & NEWPORT GRAND SLOTS BY STATE

- Nine percent (9%) of respondents in the five states surveyed report having visited Twin River Casino or Newport Grand Slots at least once during the previous twelve months (see Figure 8). Rhode Islanders report the highest percentage of visitation, with 23 percent of Ocean State residents having visited Twin River Casino or Newport Grand Slots in the last twelve months, followed by Massachusetts (7%), Connecticut (2%), New Hampshire (1%), and Maine (0.5%) residents.
- The overall propensity to gamble at Twin River Casino or Newport Grand Slots has increased since 2006 (8% 2006 to 9% 2010) (see Figure 8). The percentage of Massachusetts residents who gambled at either facility increased by 3 percentage points and by 6 percentage points for Rhode Island residents over this period.

Figure 8



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4.12 VISITATION PATTERNS AT TWIN RIVER CASINO & NEWPORT GRAND SLOTS BY FACILITY

- Eight percent (8%) of residents in the five states surveyed visited Twin River Casino at least once during the previous twelve months, while 2 percent of residents visited Newport Grand Slots at least once during the previous twelve months (see Table 18).²⁵
- Residents from the five states surveyed are four times as likely to have visited Twin River Casino (8%) compared to Newport Grand Slots (2%). In addition, Rhode Islanders are more than four times as likely to have visited Twin River Casino compared to Newport Grand Slots (22% versus 5%), while Massachusetts residents are more than seven times as likely to visit Twin River Casino compared to Newport Grand Slots (7% versus 1%) (see Table 18).
- The percentage of Rhode Island residents who have visited Twin River increased by 8 percentage points from 2006 to 2010, while the percentage of Massachusetts residents who have visited Twin River increased by 4 percentage points over this period (see Table 18).

Table 18

Percent Visited Twin River Casino or Newport Grand Slots by State								
	% Visited Twin River Casino				% Visited Newport Grand Slots			
				<u>% Change</u>				<u>% Change</u>
	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>06-10</u>	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>06-10</u>
All Respondents	7%	8%	8%	1%	2%	2%	2%	0%
*Connecticut	NA	2%	1%	-1%	NA	1%	1%	0%
Maine	0.2%	0.2%	0.4%	0.2%	0.2%	0.0%	0.1%	-0.1%
Massachusetts	3%	5%	7%	4%	1%	1%	1%	0%
New Hampshire	0.5%	1%	1%	0.5%	0.0%	0.2%	0.4%	0.4%
Rhode Island	14%	21%	22%	8%	5%	5%	5%	0%

* Connecticut was not included in the 2006 survey.

²⁵ The only statistically significant changes from the 2004 New England Gaming Behavior Survey is that the percentage of Rhode Island's visiting Twin River Casino during the last 12 months increased from 10 percent in 2004 to 22 percent in 2010, while for Massachusetts it increased from 3 percent of residents in 2004 to 7% in 2010 (Only Massachusetts and Rhode Island were included in the 2004 survey). For comparison, see, Clyde W. Barrow, et al., *Taking the Gamble IV: Who Gambles at Rhodes Island's Racinos?* (North Dartmouth, MA: Center for Policy Analysis, 2006).



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4.13 NUMBER OF VISITORS & AVERAGE VISITS PER YEAR TO TWIN RIVER CASINO & NEWPORT GRAND SLOTS BY STATE

- In the last 12 months, approximately 579,874 residents from the five New England states surveyed visited Twin River Casino and approximately 107,877 residents visited Newport Grand Slots (see Table 19). The number of visitors to Twin River Casino increased by 23 percent from 2008, while the number of visitors to Newport Grand Slots declined by 6 percent.²⁶
- In the last 12 months, an estimated 37,413 Connecticut residents visited Twin River Casino and approximately 16,034 Connecticut residents visited Newport Grand Slots (see Table 19). The number of Connecticut visitors to Twin River Casino declined by 1 percent from 2008, while the number of visitors to Newport Grand Slots declined by 0.4 percent.
- In the last 12 months, approximately 4,147 Maine residents visited Twin River Casino and approximately 1,037 Maine residents visited Newport Grand Slots (see Table 19). The number of Maine visitors to Twin River Casino increased by 106 percent from 2006, while the number of visitors to Newport Grand Slots declined by 49 percent.
- In the last 12 months, approximately 354,288 Massachusetts residents visited Twin River Casino and approximately 45,551 Massachusetts residents visited Newport Grand Slots (see Table 19). The number of Massachusetts visitors to Twin River Casino increased by 134 percent from 2006, while the number of visitors to Newport Grand Slots declined by 4 percent.
- In the last 12 months, approximately 6,103 New Hampshire residents visited Twin River Casino and approximately 4,069 New Hampshire residents visited Newport Grand Slots (see Table 19). The number of New Hampshire visitors to Twin River Casino increased by 40 percent from 2006, while the number of visitors to Newport Grand Slots increased by 4,069 persons.
- In the last 12 months, approximately 177,923 Rhode Island residents visited Twin River Casino and approximately 41,186 Rhode Island residents visited Newport Grand Slots (see Table 19). The number of Rhode Island visitors to Twin River Casino increased by 60 percent from 2006, while the number of visitors to Newport Grand Slots increased by 1 percent.

Table 19

Number of Visitors to Twin River Casino and Newport Grand Slots by State								
	Twin River Casino				Newport Grand Slots			
	2006	2008	2010	% Change 06-10	2006	2008	2010	% Change 06-10
*All Respondents	268,963	471,202	579,874	23%	90,330	115,302	107,877	-6%
*Connecticut	NA	42,932	37,413	-13%	NA	16,100	16,034	-0.4%
Maine	2,015	2,075	4,147	106%	2,015	-	1,037	-49%
Massachusetts	151,430	235,829	354,288	134%	47,322	55,194	45,551	-4%
New Hampshire	4,363	14,241	6,103	40%	-	2,034	4,069	NA
Rhode Island	111,155	176,124	177,923	60%	40,933	41,974	41,186	1%

* Comparison is to 2008 data because Connecticut was not included in the 2006 survey.

²⁶ Comparisons to 2006 data are not included because Connecticut was not included in the 2006 survey.



4.14 AVERAGE NUMBER OF VISITS

- The average annual number of visits to Twin River Casino per visitor increased by 7.9 percent from 2008 to 2010 and declined by 24 percent at Newport Grand Slots over the same period.²⁷

Table 20

Average Annual Number of Visits								
	Twin River Casino				Newport Grand Slots			
	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>% Change 06-10</u>	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>% Change 06-10</u>
*All Respondents	7.1	5.7	6.1	7%	7.1	7.1	5.4	-24%
*Connecticut	NA	1.6	3.7	133%	NA	4.3	2.0	-53%
Maine	1.0	1.0	1.6	60%	2.0	0.0	0.0	-100%
Massachusetts	3.9	2.6	5.2	34%	2.8	6.9	4.1	44%
New Hampshire	1.0	1.0	1.2	20%	0.0	1.0	1.0	100%
Rhode Island	7.3	6.8	6.7	-9%	7.4	7.5	6.1	-17%

* Comparison is to 2008 data because Connecticut was not included in the 2006 survey.

²⁷ Comparisons to 2006 data are not included because Connecticut was not included in the 2006 survey.



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

4.15 NUMBER OF VISITS PER YEAR TO TWIN RIVER CASINO & NEWPORT GRAND SLOTS BY STATE²⁸

- Residents from the five states surveyed made approximately 3.2 million visits to Twin River Casino and 474,617 visits to Newport Grand Slots in the last 12 months (see Table 21). The number of visitations to Twin River Casino increased by 68 percent from 2008 to 2010, while the number of visitations to Newport Grand Slots declined by 38 percent.²⁹
- Connecticut residents made approximately 139,177 visits to Twin River Casino and 32,229 visits to Newport Grand Slots in the last 12 months (see Table 21). The number of visitations by Connecticut residents to Twin River Casino increased by 103 percent from 2008, while the number of visitations to Newport Grand Slots declined by 53 percent.
- Maine residents made approximately 6,635 visits to Twin River Casino and no visits to Newport Grand Slots in the last 12 months (see Table 21). The number of visitations by Maine residents to Twin River Casino more than doubled from 2006.
- Massachusetts residents made approximately 1.85 million visits to Twin River Casino and 185,849 visits to Newport Grand Slots in the last 12 months (see Table 21). The number of visitations by Massachusetts residents to Twin River Casino more than doubled from 2006, while the number of visitations to Newport Grand Slots increased by 39 percent.
- New Hampshire residents made approximately 7,324 visits to Twin River Casino and 4,069 visits to Newport Grand Slots in the last 12 months (see Table 21). The number of visitations by New Hampshire residents to Twin River Casino increased by 68 percent from 2006, while the number of visitations to Newport Grand Slots increased by 4,069 visits.
- Rhode Island residents made approximately 1.2 million visits to Twin River Casino and 252,470 visits to Newport Grand Slots in the last 12 months (see Table 21). The number of visitations by Rhode Island residents to Twin River Casino increased by 36 percent from 2006, while the number of visitations to Newport Grand Slots declined by 22 percent.

Table 21

Number of Visitations to Twin River Casino and Newport Grand Slots by State								
	Twin River Casino				Newport Grand Slots			
	2006	2008	2010	% Change 06-10	2006	2008	2010	% Change 06-10
*All Respondents	1,467,763	1,895,810	3,192,808	68%	462,852	766,904	474,617	-38%
*Connecticut	NA	68,691	139,177	103%	NA	69,228	32,229	-53%
Maine	2,015	2,075	6,635	229%	4,030	-	-	-100%
Massachusetts	588,414	613,157	1,852,924	215%	134,079	380,839	185,849	39%
New Hampshire	4,363	14,241	7,324	68%	-	2,034	4,069	NA
Rhode Island	872,971	1,197,646	1,186,748	36%	324,743	314,802	252,470	-22%

* Comparison is to 2008 data because Connecticut was not included in the 2006 survey.

²⁸ This data measures the total number of visits to these facilities, as opposed to the previous section that measured the number of unique visitors.

²⁹ Comparisons to 2006 data are not included because Connecticut was not included in the 2006 survey.



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4.16 FREQUENCY OF VISITATION TO TWIN RIVER CASINO & NEWPORT GRAND SLOTS BY STATE

- Forty-two percent (42%) of the individuals who reported visiting Twin River Casino in the last 12 months visited only one time, while 74 percent had visited four times or less (see Table 22). A larger percentage of Twin River Casino patrons report visiting the racino 5 or more times (26%) per year compared to visitors to Connecticut's resort casinos (Foxwoods Resort Casino = 16%, Mohegan Sun = 18%).
- Forty-six percent (46%) of the individuals who reported visiting Newport Grand Slots in the last 12 months visited only one time, while 29 percent visited five times or more (Table 22).

Table 22

Number of Trips Per Year to Twin River Casino and Newport Grand Slots by State										
	Twin River Casino					Newport Grand Slots				
	One Time	Two Times	Three Times	Four Times	Five or More Times	One Time	Two Times	Three Times	Four Times	Five or More Times
All Respondents	42%	20%	6%	6%	26%	46%	14%	8%	3%	29%
Connecticut	55%	39%	0%	0%	6%	27%	59%	0%	14%	0%
Maine	39%	61%	0%	0%	0%	0%	0%	0%	100%	0%
Massachusetts	49%	16%	7%	9%	19%	34%	28%	6%	6%	27%
New Hampshire	79%	21%	0%	0%	0%	100%	0%	0%	0%	0%
Rhode Island	39%	20%	5%	6%	31%	50%	8%	10%	9%	23%

Note: Small number of respondents for Newport Grand Slots by state. Conclusions should be made with caution.



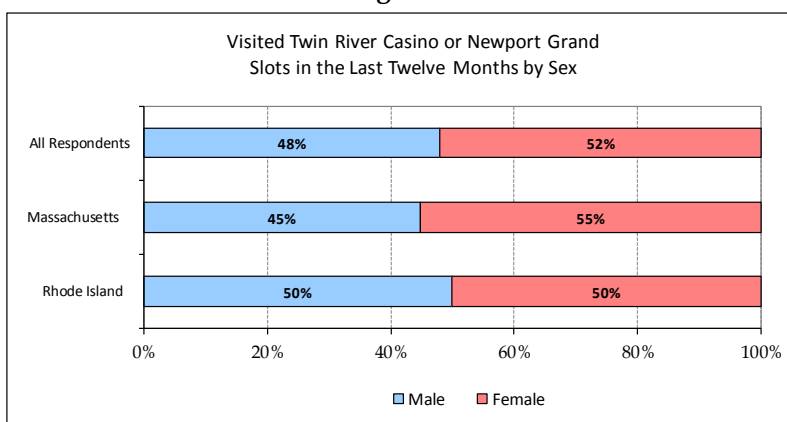
4.20 DEMOGRAPHIC PROFILE OF PERSONS FROM MASSACHUSETTS AND RHODE ISLAND WHO VISITED TWIN RIVER CASINO OR NEWPORT GRAND SLOTS IN THE LAST 12 MONTHS

All 3,839 respondents were asked to indicate their sex, age, educational attainment, and annual family income. Data is presented for Massachusetts and Rhode Island only due to the small number of respondents for the other states surveyed.

4.21 TWIN RIVER CASINO/NEWPORT GRAND SLOTS VISITORS BY SEX, 2010

- Fifty-two percent of visitors to Twin River Casino or Newport Grand Slots are women and 48 percent are men. These facilities attract a higher percentage of women from Massachusetts (55% women – 45% men) and equal percentages of men and women from Rhode Island (see Figure 9).

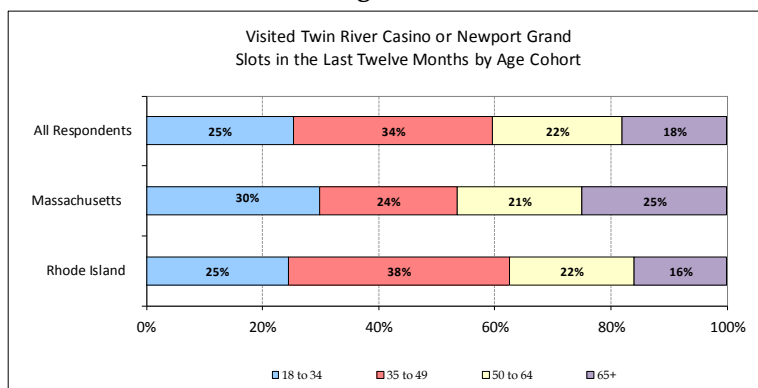
Figure 9



4.22 TWIN RIVER CASINO/NEWPORT GRAND SLOTS VISITORS BY AGE, 2010

- The largest percentage of visitors to Twin River Casino and Newport Grand Slots are in the 35-49 age cohort (34%), with 25 percent 18 to 34 years of age, 22 percent 50 to 65 years of age, and 18 percent over the age of 65 (see Figure 10).

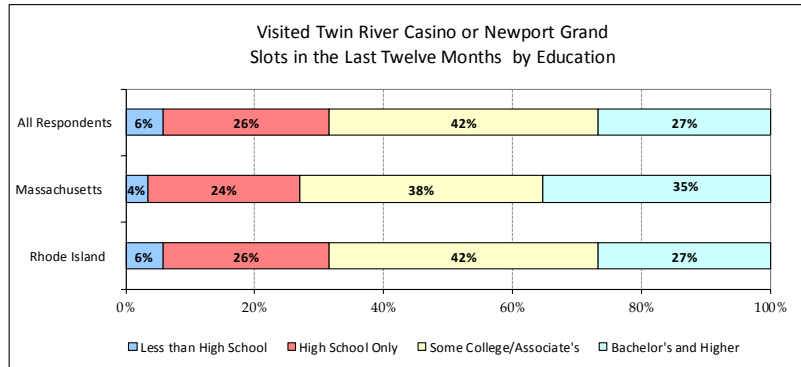
Figure 10



4.23 TWIN RIVER CASINO/NEWPORT GRAND SLOTS VISITORS BY EDUCATION, 2010

- Seventy-three percent (73%) of those who have visited Twin River Casino or Newport Grand Slots in the last 12 months have moderate levels of education – a high school diploma, some college, or associate’s degree (see Figure 11).
- Twenty-seven percent (27%) of individuals who have visited Twin River Casino or Newport Grand Slots in the last 12 months have a Bachelor’s degree or higher. Only six percent (6%) have less than a high school diploma (see Figure 11).

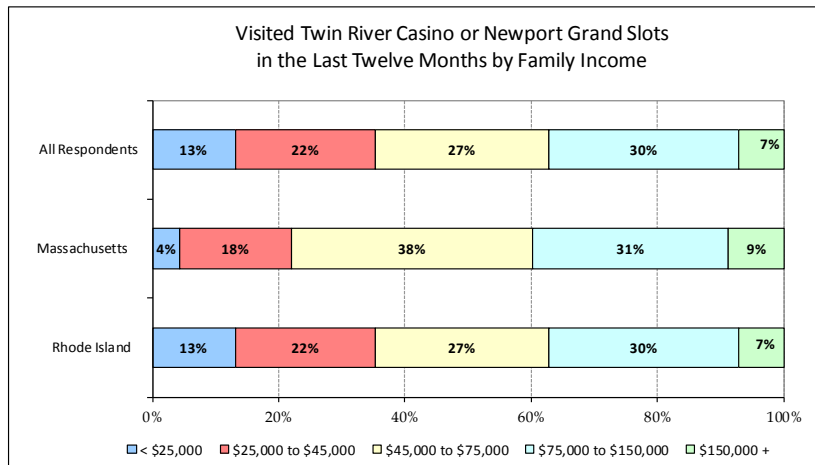
Figure 11



4.24 TWIN RIVER CASINO/NEWPORT GRAND SLOTS VISITORS BY ANNUAL FAMILY INCOME, 2010

- Nearly two-thirds (65%) of the individuals who visited Twin River Casino or Newport Grand Slots in the last 12 months have annual family incomes above \$45,000, while only 13 percent have an annual family income below \$25,000 (see Figure 12).

Figure 12



4.30 PERCENTAGE WHO VISITED TWIN RIVER CASINO OR NEWPORT GRAND SLOTS IN THE LAST 12 MONTHS WHO SPENT MONEY ON GAMBLING AND NON-GAMBLING ACTIVITIES

Respondents who said they visited Twin River Casino or Newport Grand Slots in the last 12 months were also asked: "On your last visit to Twin River Casino...Newport Grand Slots did you spend money on any of the following items? Food, hotel or lodging, retail purchases, other entertainment, gambling - yes/no."³⁰

- Most visitors to Twin River Casino (82%) and Newport Grand Slots (98%) spend money on gambling, although 18 percent of those who visited Twin River Casino and 2 percent of those who visited Newport in the last 12 months did not gamble (see Table 23). The percentage of visitors to Twin River Casino who spent money on gambling decreased from 95 percent in 2006 to 82 percent in 2010. Conversely, the percentage of visitors to Newport Grand Slots who spent money on gambling increased from 90 percent in 2006 to 98 percent in 2010 (see Table 23).
- A large percentage of Twin River Casino's visitors spend money on food (78%), but very few spend money on lodging (1%) and retail (8%) during their visits to the racino. Twenty-one percent (21%) spend money on other entertainment when they visit (see Table 23).³¹
- The percentage of Rhode Island visitors to Twin River Casino who spent money on food increased from 52 percent in 2004 to 79 percent in 2010. The percentage of Massachusetts visitors to Twin River who spent money on food, lodging, and retail remained fairly steady during this time. The percentage of Massachusetts residents who spent money on other entertainment increased from 0% in 2004 to 11% in 2010 (see Table 23).
- Three quarters of Newport Grand Slots' visitors (75%) spent money on food, but very few spend money on lodging (8%), retail (11%), or other entertainment (13%) during their visits to the racino (see Table 23).³²

Table 23

Percent Patrons Who Spent Money By Category										
	Twin River Casino					Newport Grand Slots				
	Food	Lodging	Retail	Other	Gambling	Food	Lodging	Retail	Other	Gambling
All Respondents	78%	1%	8%	21%	82%	75%	8%	11%	13%	98%
Connecticut	63%	14%	14%	37%	82%	90%	67%	42%	49%	83%
Maine	0%	0%	0%	50%	50%	100%	0%	0%	0%	100%
Massachusetts	81%	2%	9%	11%	92%	84%	0%	10%	6%	100%
New Hampshire	33%	0%	0%	0%	100%	100%	100%	100%	100%	100%
Rhode Island	79%	1%	8%	24%	78%	71%	1%	6%	9%	99%

³⁰ Data not presented for Connecticut, Maine, and New Hampshire due to the small numbers of respondents.

³¹ The percentage of Rhode Island visitors to Twin River Casino who spent money on food increased from 52 percent in 2004 to 79 percent in 2010. The percentage of Massachusetts visitors to Twin River Casino who spent money on food, lodging, or retail remained fairly consistent constant during this time. The percentage of Massachusetts residents who spent money on other entertainment increased from 0 percent in 2004 to 11 percent in 2010. For comparison, see Ibid.

³² The percentage of Rhode Island visitors to Newport Grand Slots who spent money on food increased from 47 percent in 2004 to 71 percent in 2010. The percentage of Massachusetts visitors to Newport Grand Slots who spent money on food increased from 67 percent in 2004 to 84 percent in 2010. For comparison, see Ibid.



5.00 DIFFERENTIATION BETWEEN THE RESORT CASINO MARKET AND THE CONVENIENCE GAMBLING (SLOT PARLOR/RACINO) MARKET

5.10 IMPORTANCE OF AMENITIES

The availability of table games, the availability of numerous non-gambling amenities, the physical attractiveness of the facilities, and the general atmosphere of the facilities continue to differentiate New England's Resort casino market from the convenience gambling market. For example:

- Seventy-seven percent (77%) of respondents who visited Foxwoods Resort Casino or Mohegan Sun Casino did not visit Twin River Casino or Newport Grand Slots in the last 12 months despite the closer proximity of these facilities to respondents' homes in most cases (see Table 24). This ratio has essentially not changed since the Gaming Behavior Survey first measured this differentiation statistically in 2004.

Table 24

Foxwoods/Mohegan Sun Patrons Who Have Visited Twin River or Newport Grand	
	<u>Percent</u>
Have Visited Twin River or Newport	23%
Have Not Visited Twin River or Newport	77%

- Conversely, 65 percent of respondents who visited Twin River Casino or Newport Grand Slots in the last 12 months visited Foxwoods Resort Casino or Mohegan Sun Casino, even though these facilities are often a farther drive than the racinos. (see Table 25).

Table 25

Twin River/Newport Patrons Who Have Visited Foxwoods or Mohegan Sun	
	<u>Percent</u>
Have Visited Foxwoods or Mohegan	65%
Have Not Visited Foxwoods or Mohegan	35%



5.20 IMPORTANCE OF LOCATION

Racino/Slot parlor gamblers are attracted primarily by convenience, that is, the distance they must drive to reach a facility. For example:

- Ninety-one percent of visitors (91%) to Twin River Casino traveled less than 60 minutes to get to the racino and 66 percent traveled 30 minutes or less (see Table 26). Only 8 percent traveled more than an hour.³³
- More than four-in-five visitors (83%) to Newport Grand Slots traveled less than 60 minutes to get to the racino and 28 percent traveled 30 minutes or less. Only 18 percent traveled more than an hour to reach the facility (see Table 26).

Table 26

Visitor's Travel Time						
Drive Time Band	Twin River Casino			Mohegan Sun		
	2008	2010	% Change	2008	2010	% Change
1 to 30 minutes	60%	66%	6%	33%	28%	-5%
31 to 60 minutes	31%	25%	-6%	48%	55%	7%
61 to 90 minutes	4%	6%	2%	11%	8%	-3%
91 to 120 minutes	2%	2%	0%	3%	4%	1%
> 2 hours	3%	1%	-2%	5%	6%	1%

* Note: Data for 2006 not presented because Connecticut was not included in the 2006 survey.

³³ Conversely, 65 percent of the individuals who visited Foxwoods traveled more than 60 minutes to get to the casino; thirty-six (36%) traveled more than 90 minutes. Seventy-one percent (71%) of the individuals who visited Mohegan Sun traveled more than 60 minutes to get to the casino; twenty-nine percent (29%) traveled more than 90 minutes.



6.00 HOLLYWOOD SLOTS

6.10 HOW MANY PEOPLE VISITED HOLLYWOOD SLOTS IN BANGOR, MAINE IN THE LAST 12 MONTHS?

A random sample of 3,839 Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island residents was asked the following question: "During the last 12 months, have you visited Hollywood Slots in Bangor, Maine? – yes/no." (Overall margin of error +/-1.6%).

- Just over 2 percent (2.1%) of residents in the five states surveyed report that they visited Hollywood Slots in the last 12 months, an increase of 1 percentage point from 2008 (see Table 27).
- Over nineteen percent (19.3%) of Maine's adult residents visited Hollywood Slots at least once in the last 12 months, which is more than double the percentage in 2008 (8.8%) (see Table 27).³⁴
- It is estimated that over 207,000 Maine residents made at least one trip to Hollywood Slots in the last 12 months, an increase of 101 percent from 2008 (see Table 27).
- A much smaller number of residents from other states visited Hollywood Slots:³⁵
 - 1.3 percent of New Hampshire residents, or 12,250 visitors,
 - 0.1 percent of Massachusetts residents, or 4,203 visitors,
 - 0.0 percent of Connecticut residents, and
 - 0.2 percent of Rhode Island residents.

Table 27

Visitation Patterns to Hollywood Slots						
	Percent Visited			Total Annual Visitors		
	2008	2010	% Change	2008	2010	% Change
All Respondents	1.1%	2.1%	1.0%	103,232	207,141	101%
Connecticut	0.1%	0.0%	-0.1%	2,527	-	NA
Maine	8.8%	19.3%	10.5%	86,476	189,093	119%
Massachusetts	0.2%	0.1%	-0.1%	9,446	4,203	-56%
New Hampshire	0.5%	1.3%	0.8%	4,783	12,250	156%
Rhode Island	0.0%	0.2%	0.2%	-	1,594	NA

³⁴ By comparison, Rhode Island's two racinos were visited at least once in 2010 by 22% of the Rhode Island population and by 7 percent of Massachusetts residents.

³⁵ Field observations also identified a few automobiles from Vermont and the eastern Canadian provinces.



6.20 HOLLYWOOD SLOTS' PLAYERS CONTINUE TO VISIT OTHER OUT-OF-STATE CASINOS

- Eighteen percent (18%) of Maine residents who visited Hollywood Slots in the last 12 months also visited another out-of-state casino at least one time in the last 12 months (see Table 28).

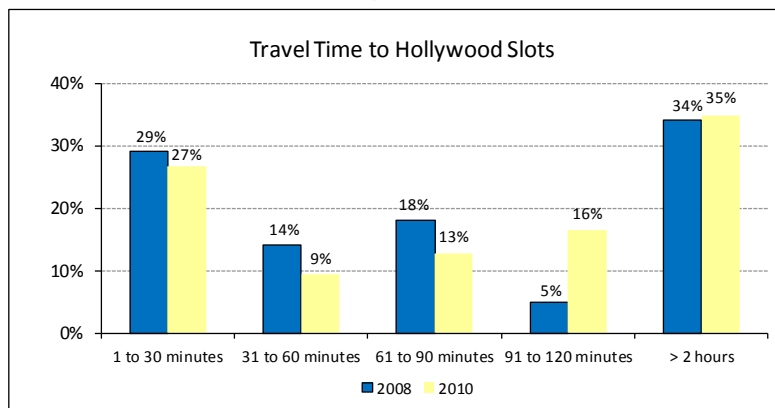
Table 28

Hollywood Slots Players Who Have Visited a Casino In Last Twelve Months	
	<u>Percent</u>
Have Visited Another Casino	18%
Have Not Visited Another Casino	82%

6.30 TRAVEL TIME TO HOLLYWOOD SLOTS

- Visitors to Hollywood Slots are driving longer to visit the facility. In 2010, sixty-four percent (64%) of Hollywood Slots visitors traveled more than 60 minutes to get to the facility and 51 percent traveled more than 90 minutes to get to the racino (see Figure 13).³⁶ This compares to 57 percent and 39 percent of visitors respectively in 2008.
- Thirty-six percent (36%) of Hollywood Slots visitors traveled 60 minutes or less to get to the racino, while 27 percent traveled 30 minutes or less (see Figure 13).

Figure 13



³⁶ By comparison, 91 percent of visitors to Twin River Casino in Rhode Island traveled less than 60 minutes to get to the racino and 66 percent traveled 30 minutes or less. More than eighty percent (83%) of the visitors to Newport Grand Slots in Rhode Island traveled less than 60 minutes to get to the racino and 28 percent traveled 30 minutes or less.

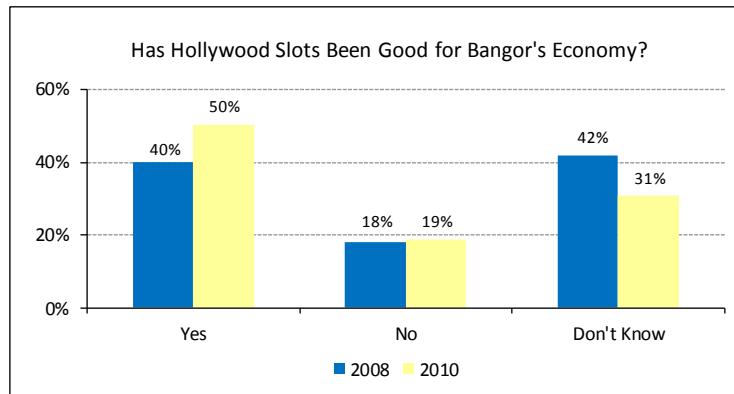


6.40 HAS HOLLYWOOD SLOTS BEEN GOOD FOR THE BANGOR ECONOMY?

All Maine respondents were asked: "Overall, do you think that Hollywood Slots has been good for Bangor's economy? Yes/No/Don't Know."

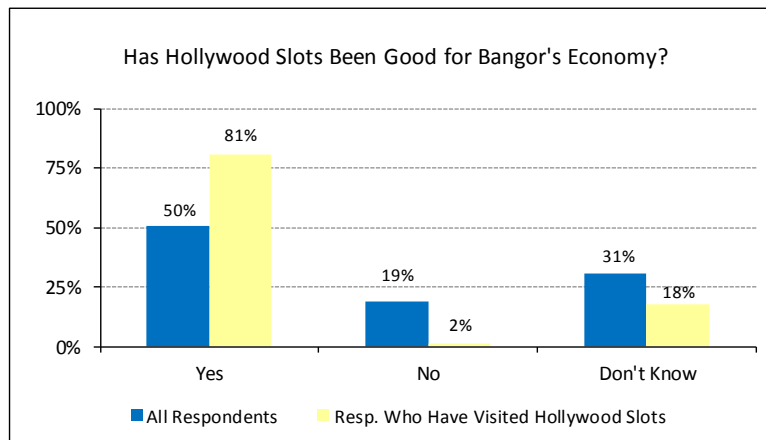
- Maine residents who have made up their minds about the economic impact of Hollywood Slots are more than 2.5 times as likely to think that it has had a positive impact (50%) on the local economy than a negative or no impact (19%) on the local economy. However, many Maine residents (31%) are still uncertain about whether Hollywood Slots has been good for Bangor's economy (see Figure 14), although this percentage has declined by 11 percent since 2008.

Figure 14



- Among Maine residents who have actually visited Hollywood Slots in the last twelve months, more than four-in-five (81%) believe that the facility has had a positive impact on the local economy, compared to 2 percent who believe it has had a negative or no impact and 18 percent who are still undecided (see Figure 15).

Figure 15



APPENDIX A - METHODOLOGY

What is the New England Gaming Behavior Survey?

The New England Gaming Behavior Survey is conducted every two years for the purpose of informing on-going debates about expanded gambling in Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island and to provide a region-wide base of knowledge about gaming behavior in New England. The 1st New England Gaming Behavior Survey (2004) polled more than 2,400 respondents in the states of Massachusetts and Rhode Island, which at the time were debating various proposals for expanded gambling. The 2nd New England Gaming Behavior Survey (2006) interviewed 2,806 residents in four of the six New England states. The 2006 survey was expanded to include Maine and New Hampshire because a slot parlor opened in Maine in late 2005, while previous studies by the Center for Policy Analysis have found that New Hampshire is a significant feeder market for Connecticut's two Native American casinos. On the other hand, Vermont has not entertained any proposals for expanded gambling and previous studies have not found it to be a significant feeder market to any of the region's established gaming destinations.

In late 2008 and early 2009, the Center for Policy Analysis conducted its 3rd New England Gaming Behavior survey, which was a random sample telephone survey of 3,970 residents in Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island. Connecticut was added to the survey because the state is a unique gaming market that combines features of both destination and convenience gambling and therefore warrants a separate analysis.

The overall survey is designed to measure the propensity to gamble among New England residents, to identify the demographic characteristics of casino and racino gamblers, as well as the types of games played by casino visitors, and to identify other patterns in gambling behavior among the five states' residents. A copy of the most recent survey questionnaire can be read in Appendix B.

What Methodology Was Used to Conduct the New England Gaming Behavior Survey?

The 4th New England Gaming Behavior Survey was conducted from January 5, 2011 through February 10, 2011 using a survey instrument developed by research staff at the Center for Policy Analysis (see Appendix B). The survey generated a total of 3,839 respondents distributed among the five New England states included in the survey. The margin of error at a 95% confidence interval is different for the state-level sub-samples:

Table 29

State	# Respondents	% of Total Sample	Margin of Error
Connecticut	809	21.1%	+/- 3.5%
Maine	400	10.4%	+/- 4.9%
Massachusetts	1,200	31.3%	+/- 2.8%
New Hampshire	402	10.5%	+/- 4.9%
Rhode Island	1,028	26.8%	+/- 3.1%
Total:	3,839	100.0%	+/- 1.6%



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The Center for Policy Analysis uses the Genesys Sampling System to generate random telephone numbers. The Genesys Sampling System is used by many private and university-based polling and survey research organizations. The system uses a list of all possible telephone numbers in a particular geographic area (e.g., a state) to randomly generate a telephone sample for the designated geographic area. The New England Gaming Behavior Survey was conducted using a random digit dialing (RDD) sample. The RDD sample insures an equal and known probability of selection for every residential telephone number (listed and unlisted) in the sample geographic frame.

The Center for Policy Analysis uses Computer Assisted Telephone Interviewing, or CATI, to conduct telephone surveys. Specifically, the Center for Policy Analysis uses WinCATI software from Sawtooth Technologies, which is one of the most widely used CATI systems in the world. Using WinCATI, telephone interviewers conduct interviews via computers, which provides highly reliable data because the computer controls the questionnaire, skip patterns are executed exactly as intended, responses are within range, and there are no missing data.

Student research assistants and Center staff were employed as telephone interviewers. These interviewers have conducted numerous telephone polls on behalf of the Center and all have been trained intensively, including practice interviews. Senior-level staff at the Center for Policy Analysis monitored the interviewers at all times to ensure high quality data collection. Telephone interviews were conducted between 9:00 am and 8:00 pm on weekdays and between 9:00 am and 4:00 pm on Saturdays and Sundays. The Center's senior staff continually monitored the progress of interview outcomes to prevent problem cases that could interfere with the integrity of survey procedures. The survey procedures used by the Center for Policy Analysis adhere to the highest quality academic and government research standards.

The final responses are weighted to account for sampling bias. Sampling bias is defined as the tendency of a sample to exclude some members of the sampling universe and over-represent others. In this study, females and older respondents are over-represented. Weighting the data allocates more "weight" to groups that are under-represented (e.g. younger males), while providing less weight to groups that are over-represented (e.g. older females). In other words, weighting adjusts the sample so that it looks more like the actual population of the study population as defined by the U.S. Census Bureau (2005-2009 American Community Survey estimates). All data in this report have been weighted to adjust for sex and age.

Who funds the New England Gaming Research Project?

The New England Gaming Research Project is funded entirely by the University of Massachusetts Dartmouth, including all research expenses and the salaries and wages of all individuals participating in the research project.

Why study casino gaming?

There are many reasons why the Center for Policy Analysis launched the New England Gaming Research Project:

First, casino gaming is a \$3.0 billion industry in New England that employs approximately 19,200 people at Foxwoods Resort Casino and Mohegan Sun Casino in Connecticut, at Rhode Island's video lottery terminal (VLT) parlors at Twin River and Newport Grand, and at Hollywood Slots in Bangor, Maine. The number of casino employees does not include the nearly 2,000 employees working at the region's non-slot pari-mutuel facilities in Massachusetts, Maine, and New Hampshire; nor does it include



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the hundreds of public employees working in the region's state lottery agencies, which generate \$1.7 billion in annual revenues for New England's six state governments (FY 2010).

Second, casinos, video lottery terminal parlors, and racinos have become an important source of revenue in New England's state budgets. In calendar year 2010, Foxwoods and Mohegan Sun generated \$346 million in revenues for the Connecticut state treasury, while Rhode Island's VLT facilities generated \$292 million – making Rhode Island's two VLT facilities the third largest source of revenue for the Ocean State. Maine's upscale racino generated \$28 million in calendar year 2010, with the monies earmarked for the city of Bangor, the Healthy Maine initiative, scholarships to attend Maine's state universities and community colleges, and other initiatives designed to strengthen the state's pari-mutuel racing industry.

Third, as a result of casino gaming's significant economic and fiscal impacts, gaming expansion has become a perennial policy debate in New England's state legislatures. In Massachusetts, the House of Representatives had previously blocked expanded gaming legislation, despite support in the State Senate, including several efforts to bring casino or racino gaming to the Bay State in 1995 (1 casino), 1997 (2 casinos and 4 racinos), 1999 (3 casinos), 2003 (2 casinos and 4 racinos), and 2006 (4 racinos). On March 20, 2008, the Massachusetts House of Representatives rejected a proposal by Governor Deval Patrick to license three resort casinos in the Bay state, despite the fact that Massachusetts residents now regularly gamble at the casinos in Connecticut and the slot parlors in Rhode Island, and despite the fact that numerous polls by different academic and professional organizations have documented public support for expanded gaming legislation in Massachusetts. In the 2010 legislative session, the House and Senate passed a bill that would have authorized three resort casinos and two racinos, but Governor Deval Patrick refused to sign the bill. The expanded gaming debate is already on the agenda for the 2011 legislative session.

In Rhode Island, the state's General Assembly and Governor Donald Carcieri authorized the addition of thousands more VLT's at Twin River and Newport Grand in 2006, which resulted in the largest gaming expansion in that state's history. Twin River and Newport Grand are currently authorized to offer up to 4,752 VLTs and 2,101 VLTs, respectively. However, a constitutional amendment that would have authorized a \$1 billion Narragansett Indian Casino in West Warwick, Rhode Island was rejected by voters on November 7, 2006 by a margin of 63% to 37%. However, in response to the potential for expanded gaming in Massachusetts, key leadership in the Rhode Island General Assembly is seeking to place a referendum on the state's November 2011 ballot that would authorize "full-fledged casinos" with table games at Twin River and Newport Grand or in downtown Providence.

In Maine, Hollywood Slots opened in Bangor, Maine on November 4, 2005, as that state's first upscale convenience gaming facility. In 2006, the Maine state legislature passed a bill authorizing a second racino in Washington County and another bill allowing the county's voters to decide the issue. Both bills were successfully vetoed by the Governor. However, Maine has continued to debate the question of expanded gaming. On November 6, 2007, Maine's voters rejected Question 1, also known as the Maine Racino Initiative of 2007, in a statewide referendum by a margin of 52% to 48%. Question 1 would have authorized slot machines at a tribal commercial track under the supervision of the Maine Gambling Control Board in Washington County on the state's southern eastern border with Canada. It would also have authorized the issuance of a high-stakes beano license to a federally recognized Indian tribe to operate games on nontribal land in Washington County, Maine. On November 4, 2008, Maine voters again rejected a statewide ballot measure that would have authorized a small resort casino in Oxford, Maine by a margin of 54% to 46%. In same the election, voters in Scarborough, Maine narrowly rejected a local proposal to authorize slot machines at that town's racetrack, although efforts are still underway to win local approval under the state's existing gaming legislation. However, in a statewide



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referendum on November 2, 2010, Maine's voters narrowly approved a small resort casino for Oxford, Maine, which will soon become the state's second Class III gaming venue.

Finally, in New Hampshire, the state's General Court again took up the issue of expanded gaming during its 2009 legislative session. A bill authorizing a resort casino in Hudson, New Hampshire, and three racinos in Belmont, Salem, and Seabrook passed the Senate, but the bill was decisively rejected in the New Hampshire House of Representatives.

For more information about the New England Gaming Research Project go to, <http://www.umassd.edu/seppce/centers/cfpa/newenglandgamingresearchproject/>.

About the Center for Policy Analysis

The Center for Policy Analysis is a multidisciplinary research unit of the University of Massachusetts Dartmouth. Its mission is to promote economic, social, and political development by providing research and technical assistance to client organizations. The Center for Policy Analysis offers custom designed research and technical analysis in the areas of economic development, public management, program evaluation and public opinion research for government agencies, non-profit organizations, private businesses, and educational institutions. The Center for Policy Analysis has completed more than 300 research projects for various groups and agencies since 1992.

For more information about the Center for Policy Analysis and its work, go to <http://www.umassd.edu/seppce/centers/cfpa/>.



APPENDIX B: SURVEY QUESTIONNAIRE

<INTRO:>

Hello, my name is _____ and I'm calling from UMass Dartmouth. How are you today? We are conducting an important survey on casino gaming in New England. The survey should take about 5 to 10 minutes to complete and your opinions are very important. Let me assure you that all your responses are completely confidential - we do not have any information about you other than your telephone number.

Q1. Do you have a few minutes to complete the survey? <hello>

- 1 YES [SKIP TO Q3]
- 2 NO [SKIP TO Q2]

Q2. Your opinions on this issue are very important and we'd like to give you an opportunity to make your opinions heard. Are you sure you do not have just a few minutes to complete the survey? <hello2>

- 1 YES [SKIP TO Q3]
- 2 NO [END INTERVIEW]

Q3. First, I'd like to ask if you are at least 18 years of age. <eight>

- 1 YES [SKIP TO Q5]
- 2 NO [SKIP TO Q4]

Q4. Is there someone 18 years of age or older that I can speak to? <eight2>

- 1 YES [SKIP TO INTRO]
- 2 NO [END INTERVIEW]

Q5. Can you please tell me your zip code? _____ <zip>

[Interviewer: If respondent refuses to provide zip code, please read:

"We are asking for your zip code so that we can determine if there are any differences between the opinions of respondents based on where they live. Keep in mind that all responses are strictly confidential and that we do not have any information about you other than your telephone number. Are you sure that you do not want to provide your zip code?"]

99999=Refused



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q6. Have you participated in any form of legal gambling in the last 12 months such as casinos, the lottery, a racetrack or bingo? <gambling>

- 1 YES
- 2 NO (SKIP TO Q8)

Q7. Please tell me if you have participated in any of the following forms of gambling in the last 12 months. How about:

[Randomize]

	Yes	No	Don't Know	Refused
a. Scratch Tickets <scratch>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Other Lottery games such as Megabucks or Powerball <lottery>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Keno <keno1>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Casino gambling <casino>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Wagered on a dog or horse race <dog>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Bingo <bingo>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Wagering over the Internet <internet>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Poker <poker>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Sports betting <sports>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7a All things being equal in terms of size, gaming options and distance from your home, if smoking were prohibited on the gaming floor, would you be more likely or less likely to visit a casino where smoking is prohibited, or does it not matter? <smoke>

- 1 MORE LIKELY
- 2 LESS LIKELY
- 3 DOES NOT MATTER
- 88 DON'T KNOW
- 99 REFUSED



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q8. During the last 12 months, how many times did you visit Foxwoods Resort Casino in Connecticut? <foxvisit>

[Interviewer: Please write in "0" if respondent has not visited Foxwoods].

999 = refused

Q9. When you visit Foxwoods, do you usually spend money on any of the following items? How about :

[Randomize]

	Yes	No	Don't Know	Refused
a. Food and beverages <foxfood>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Hotel or lodging <foxhotel>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Retail purchases <foxretl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Other entertainment such as shows, dancing, concerts <foxenter>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Gambling <foxgambl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Golf <golf>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Spa services <spa>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10a What games do you play when you gamble at Foxwoods? How about <play_fox>

[INTERVIEWER: PLEASE READ CHOICES AND CHECK ALL THAT APPLY]

- 1 SLOTS <fox_slots>
- 2 TABLE GAMES, NOT INCLUDING THE POKER ROOM <fox_table>
- 3 BINGO <fox_bingo>
- 4 POKER IN THE POKER ROOM <fox_room>
- 5 KENO <fox_keno>
- 6 RACEBOOK <fox_race>
- 7 OTHER <fox_otr>
- 88 DON'T KNOW (SKIP TO Q11)
- 99 REFUSED (SKIP TO Q11)



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q10b. Of the games you do play, what do you play most often, or do you play them all equally?
 <play_fox2>

- 1 SLOTS
- 2 TABLE GAMES, NOT INCLUDING THE POKER ROOM
- 3 BINGO
- 4 POKER IN THE POKER ROOM
- 5 KENO
- 6 RACEBOOK
- 7 OTHER
- 8 PLAY THEM EQUALLY
- 88 DON'T KNOW
- 99 REFUSED

Q11. During the last 12 months, how many times did you visit Mohegan Sun Casino in Connecticut?
 _____ <mohvisit>

[Interviewer: Please write in "0" if respondent has not visited Mohegan Sun].

999 = refused

Q12. When you visit Mohegan Sun, do you usually spend money on any of the following items? How about:

[Randomize]

	Yes	No	Don't Know	Refused
a. Food and beverages <mohfood>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Hotel or lodging <mohhotel>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Retail purchases <mohretl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Other entertainment such as shows, dancing, concerts <mohenter>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Gambling <mohgambl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Spa services <mohspa>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q13a What games do you play when you gamble at Mohegan Sun? How about <play_moh>

[INTERVIEWER: PLEASE READ CHOICES AND CHECK ALL THAT APPLY]

- 1 SLOTS <moh_slots>
- 2 TABLE GAMES, NOT INCLUDING THE POKER ROOM <moh_table>
- 3 POKER IN THE POKER ROOM <moh_room>
- 4 KENO <moh_keno>
- 5 RACEBOOK <moh_race>
- 6 OTHER <moh_otr>
- 88 DON'T KNOW (SKIP TO Q14)
- 99 REFUSED (SKIP TO Q14)

Q13b. Of the games you do play, what do you play most often, or do you play them all equally?
<playmoh2>

- 1 SLOTS
- 2 TABLE GAMES, NOT INCLUDING THE POKER ROOM
- 3 POKER IN THE POKER ROOM
- 4 KENO
- 5 RACEBOOK
- 6 OTHER
- 7 PLAY THEM EQUALLY
- 88 DON'T KNOW
- 99 REFUSED

Q14. During the last 12 months, how many times did you visit Twin River in Lincoln, Rhode Island?
_____ [trvisit]

[Interviewer: Please write in "0" if respondent has not visited Twin River].

999 = refused



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q15. When you visit Twin River, do you usually spend money on any of the following items? How about:

[Randomize]

	Yes	No	Don't Know	Refused
a. Food and beverages <trfood>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Hotel or lodging <trhotel>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Retail purchases <trretl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Other entertainment such as shows, dancing, concerts <trenter>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Gambling <trgambl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q16. During the last 12 months, how many times did you visit Newport Grand in Newport, Rhode Island? _____ <newvisit>

[Interviewer: Please write in "0" if respondent has not visited Newport Grand].

999 = refused

Q17. When you visit Newport Grand, do you usually spend money on any of the following items? How about:

[Randomize]

	Yes	No	Don't Know	Refused
a. Food and beverages <newfood>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Hotel or lodging <newhotel>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Retail purchases <newretl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Other entertainment such as live music and dancing <newenter>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Gambling <newgambl>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q18. During the last 12 months, how many times have you visited Hollywood Slots in Bangor, Maine?

[Interviewer: Please write in "0" if respondent did not visit] _____ <bangor>

Q19. During the last 12 months, how many times have you visited a casino in Atlantic City, New Jersey?

[Interviewer: Please write in "0" if respondent did not visit] _____ <ac>

Q20. During the last 12 months, how many times have you visited a casino in Las Vegas, Nevada?

[Interviewer:

[Interviewer: Please write in "0" if respondent did not visit] _____ <lv>

Q21. During the last 12 months, how many times have you visited a casino in any other place in the United States or abroad?

[Interviewer: Type in "0" if respondent did not visit] _____ <us>

Q21a. What place (s) did you visit a casino? _____ <us_other>

[Interviewer: May include more than one response]

Q22. [ME residents only] Overall, do you think that Hollywood Slots has been good for Bangor's economy? <econ>

1 YES [SKIP TO Q27]

2 NO [SKIP TO Q27]

88 DON'T KNOW [SKIP TO Q27]

99 REFUSED [SKIP TO Q27]

Q23. [MA residents only] Do you support or oppose Governor Deval Patrick's plan to authorize three destination resort casinos in Southeastern Massachusetts, Western Massachusetts and Greater Boston? <support>

1 SUPPORT

2 OPPOSE

3 UNDECIDED

99 REFUSED



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q24. [MA residents only] Do you support or oppose the state legislature's plan to authorize three destination resort casinos in Southeastern Massachusetts, Western Massachusetts and Greater Boston and to allow a limited number of slot machines at two of the state's racetracks? <support_leg>

- 1 SUPPORT [SKIP TO Q27]
- 2 OPPOSE [SKIP TO Q27]
- 3 UNDECIDED [SKIP TO Q27]
- 99 REFUSED [SKIP TO Q27]

Q25. [NH residents only] Do you support or oppose the legalization of casino gambling in the state of New Hampshire, or are you undecided? <nh_support>

- 1 SUPPORT
- 2 OPPOSE
- 3 UNDECIDED
- 99 REFUSED

Q26. [NH residents only] Let's say that the state legislature legalized casino gambling in New Hampshire. On a scale of 1 to 10, with 1 being a poor location for a casino and 10 being a great location for a casino, how would you rate the following locations that have been proposed as possible sites for a casino? How about:

Hudson at the Green Meadow Golf Course <hudson>	1-10 _____	DK	RF
Salem at Rockingham Park <salem>	1-10 _____	DK	RF
Seabrook at Seabrook Park <seabrook>	1-10 _____	DK	RF
Belmont at the Lodge at Belmont <belmont>	1-10 _____	DK	RF
Loudon at the New Hampshire Motor Speedway <loudon>	1-10 _____	DK	RF
Downtown Berlin <berlin>	1-10 _____	DK	RF

Q27. Now I would like to ask you about some experiences you may have had because of gambling. Please keep in mind that your responses are strictly confidential.

Have you lost more than \$100 gambling in a single day or year? <100>

- 1 YES
- 2 NO (SKIP TO Q38)
- 88 DON'T KNOW (SKIP TO Q38)
- 99 REFUSED (SKIP TO Q38)



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q28. Have you ever received any kind of help or treatment for gambling problems? This includes self-help groups and help from professionals such as doctors or counselors. <help>

- 1 YES
- 2 NO
- 88 DON'T KNOW
- 99 REFUSED

Q29. Have there ever been periods lasting two weeks or longer when you needed to gamble with increasing amounts of money or with larger bets than before in order to get the same feeling of excitement? <increase>

- 1 YES
- 2 NO
- 88 DON'T KNOW
- 99 REFUSED

Q30. Have you ever tried to stop, cut down, or control your gambling? <cut>

- 1 YES
- 2 NO (SKIP TO Q32)
- 88 DON'T KNOW (SKIP TO Q32)
- 99 REFUSED (SKIP TO Q32)

Q31. Have you ever tried but not succeeded in stopping, cutting down, or controlling your gambling? <succeed>

- 1 YES
- 2 NO
- 88 DON'T KNOW
- 99 REFUSED

Q32. Have you ever gambled as a way to escape from personal problems? <escape>

- 1 YES
- 2 NO
- 88 DON'T KNOW
- 99 REFUSED



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

- Q33. Has there ever been a period when, if you lost money gambling one day, you would return another day to get even? <return>
- 1 YES
 - 2 NO
 - 88 DON'T KNOW
 - 99 REFUSED
- Q34. Have you ever lied to family members, friends, or others about how much you gamble or how much money you lost on gambling? <lied>
- 1 YES
 - 2 NO
 - 88 DON'T KNOW
 - 99 REFUSED
- Q35. Have you ever needed to ask family members or anyone else to loan you money or otherwise bail you out of a desperate money situation that was largely caused by your gambling? <loan>
- 1 YES
 - 2 NO
 - 88 DON'T KNOW
 - 99 REFUSED
- Q36. Has your gambling ever caused serious or repeated problems in your relationships with any of your family members or friends? <relation>
- 1 YES
 - 2 NO
 - 88 DON'T KNOW
 - 99 REFUSED
- Q37. Has your gambling ever caused you to lose a job, have trouble with your job, or miss out on an important job or career opportunity? <lose_job>
- 1 YES
 - 2 NO
 - 88 DON'T KNOW
 - 99 REFUSED



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q38. OK, we are just about finished. I would just like to ask a few questions about yourself. This will help us to understand the types of people we are talking to.

Do you mind telling me your age? _____ <age>

Q39. INTERVIEWER: RECORD SEX <sex>

- 1 MALE
- 2 FEMALE

Q40. What is the last grade of school that you completed? <grade>

[Interviewer: Read Choices]

- 1 LESS THAN HIGH SCHOOL
- 2 HIGH SCHOOL DIPLOMA
- 3 SOME COLLEGE
- 4 ASSOCIATE'S
- 5 BACHELOR'S
- 6 GRADUATE OR HIGHER
- 8 DON'T KNOW
- 9 REFUSED

Q41. Can you please tell me what your family income for the past year is? This information is important so that we can draw comparisons between respondents. Let me again assure you that all your responses are confidential. <income>

[Interviewer: Read Choices]

- 1 LESS THAN \$25,000
- 2 \$25,000 TO \$45,000
- 3 \$45,000 TO \$75,000
- 4 \$75,000 TO 150,000
- 5 \$150,00 OR MORE
- 8 DON'T KNOW
- 9 REFUSED

Q42. Do you have children under the age of 18? <children>

- 1 YES
- 2 NO
- 9 REFUSED



Place Your Bet III: Who Gambles at New England's Casinos and Racinos?

Q43. How would you describe your political orientation? Would you say you are <orient>

[Interviewer: Read Choices]

- 1 VERY LIBERAL
- 2 LIBERAL
- 3 MODERATE
- 4 CONSERVATIVE
- 5 VERY CONSERVATIVE
- 88 DON'T KNOW
- 99 REFUSED

Q44. Which political party do you identify with most strongly? <party>

[Interviewer: Read Choices]

- 1 DEMOCRAT
- 2 REPUBLICAN
- 3 INDEPENDENT
- 4 OTHER (PLEASE INDICATE) _____
- 5 NONE
- 88 DON'T KNOW
- 99 REFUSED



APPENDIX C: DEMOGRAPHIC PROFILE OF RESPONDENTS

		Total		CT		ME		MA		NH		RI	
Sex		Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number
	Male	47	1,820	48	386	47	189	47	563	49	195	47	487
	Female	53	2,019	52	423	53	211	53	637	52	207	53	541
	Total	100	3,839	100	809	100	400	100	1,200	100	402	100	1,028
Age Cohort													
	18-34	27	1,010	26	203	24	95	29	334	27	105	27	273
	35-49	31	1,157	32	250	30	117	30	353	31	123	31	315
	50-64	24	903	24	191	26	101	23	271	25	97	24	243
	65+	18	679	18	142	20	78	18	207	18	70	18	180
	Refused	NA	90	NA	23	NA	9	NA	35	NA	7	NA	17
	Total	100	3,839	100	809	100	400	100	1,200	100	402	100	1,028
Family Income													
	<\$45K	35	1,109	36	230	43	150	31	300	34	115	38	313
	\$45-\$75K	26	804	23	149	28	97	26	258	25	84	26	216
	\$75K-\$150K	29	903	28	180	23	81	30	298	31	105	29	239
	\$150K+	11	338	14	90	6	22	13	128	11	36	8	63
	Refused	NA	685	NA	160	NA	50	NA	216	NA	62	NA	197
	Total	100	3,839	100	809	100	400	100	1,200	100	402	100	1,028
Education													
	<High School	4	144	4	34	2	10	3	33	1	4	6	64
	HS Diploma Only	25	946	27	219	30	119	20	242	22	90	27	275
	Some Coll./Associate's	30	1,146	28	229	31	123	31	372	29	114	30	307
	Bachelor's or Higher	41	1,581	40	323	37	146	46	542	48	194	37	376
	Refused	NA	22	NA	4	NA	2	NA	11	NA	0	NA	6
	Total	100	3,839	100	809	100	400	100	1,200	100	402	100	1,028

Note: Percentages may not add to 100 percent due to rounding.



