To: Interested Parties

From: The Parkside Group, LLC

Date: November 18, 2023

Re: iGaming and iLottery Survey Findings

At the request of the Sports Betting Alliance, we conducted a statewide telephone poll to survey attitudes of New York voters about gaming, iGaming, iLottery and the expected budget deficit facing the State of New York in 2024. This survey found that voters are profoundly concerned about the deficit, and clearly prefer legalizing mobile gaming to alternative options for raising revenue.

Additional Key findings of this survey include:

Most New York Voters Have Placed Bets at Casinos and Nearly All Have Played the Lottery.

More than two out of three New Yorkers (67%) have visited a casino and played poker, roulette, blackjack, or a slot machine, compared to 32% that have not. Nearly three-quarters (73%) of voters aged 35-64, and majorities of every demographic and political sub-group, have visited a casino. Meanwhile 85% of New Yorkers, including at least 74% of every demographic and political sub-group, have played the lottery—either for a drawing or a scratch-off game.

More Than 1 in 7 Voters Have Participated in Mobile Sports Betting.

In the nearly two years since mobile sports betting launched in New York, 15% of voters report placing a wager. Men (21%), Voters under 35 (22%), and voters who are not enrolled in a political party (22%) are the most likely to have participated.

A Majority of New York Voters Support Allowing Adults to Place Other Types of Wagers Online

By an 11-point margin (51%-40%), voters support approving iGaming in New York that will allow adults to place wagers online. Nearly every demographic and political

sub-group preferred allowing iGaming, as opposed to the current system where adults who wish to wager are forced to either travel long distances or break the law by using illegal, offshore websites. Support was strongest among voters not registered in a political party (57% favor vs. 35% oppose), and voters under the age of 35 (59% favor vs. 36% oppose.

Support for iLottery was even greater, with 53% of voters supporting allowing adults to play the lottery online. Again, nearly every demographic and political group supported the proposal, with the strongest support coming from voters not enrolled in a political party (60% favor vs. 36% oppose), voters in New York City (59% favor), Asian voters (60% favor), Latinx voters (59% favor), and African-Americans (58% favor).

A Strong Majority of New Yorkers are Highly Concerned About the Impending Budget Deficit

Voters are highly concerned about projected deficits. When asked to rate their level of concern for looming deficits on a scale of 1-10, with 10 being the highest level of concern, 40% of voters rated their concerns a 10, compared to just 14% of voters who rated their concerns a 1, 2, or 3. A plurality of every demographic and political sub-group rated their concerns about deficits a 10 out of 10.

Voters Support Increasing Gaming Revenue to Tackle the Deficit, But Not Tax Hikes or Spending Cuts

Addressing the deficit by cuts to spending or raising revenue through income taxes are extremely unpopular. 85% of voters oppose raising income taxes to address the deficit. Democrats oppose this option by 76% and unaffiliated voters by 92%. Opposition is high across all regions of the state, including New York City where 81% of voters are against the idea.

Similarly, spending cuts to services were extremely unpopular, with 82% of voters in opposition. Evan Republican voters are against spending cuts, with 72% saying they don't support cuts as a means to address the potential deficit, along with 86% of Democrats and 83% of voters not enrolled in a party.

Opposition against raising taxes on business is also unpopular, with 61% of voters opposing that choice. A plurality of Democrats oppose raising business taxes (48%

oppose vs 46% favor), while strong majorities of voters not enrolled in a party (67% oppose vs. 30% favor) and Republicans (79% oppose vs. 17% favor) are against the idea.

In contrast, increasing gaming revenue to offset taxes enjoys support among voters. A clear majority (53% favor vs. 42% oppose) support the proposal. Clear support is found among voters not enrolled in a party (58% support vs. 37% oppose), Democrats (52% support vs. 43% oppose), Men (58% support vs 39% oppose), residents of New York City (60% support vs. 36% oppose), and college-educated voters 57% support vs. 40% oppose).

A Clear Majority of New York Voters Prefers Increased Gaming Revenue to Tax Hikes

More than 60% of New Yorkers agree that in working to close the deficit, New York should look to options such as mobile gaming and online lottery before raising new taxes on families or businesses (61% favor vs. 33% oppose). A majority of every single demographic and political sub-group said New York should expand gaming before raising taxes, with strong support coming from voters not enrolled in a party (67% agree vs. 30% disagree), Democrats (60% agree vs. 34% disagree), and college-educated voters (63% agree vs. 33% disagree).

A Note About Methodology

The poll was conducted in English from October 04-13, 2023 among 800 registered New York voters with representative samples for region, party, race, and gender. Mobile phones accounted for 50% of survey responses, while 50% were conducted over landlines. At the 95% confidence level, the overall margin of error in the survey is 3%. The margin of error is higher among sub-groups.

About The Parkside Group

The Parkside Group has been providing electoral, corporate, and advocacy clients with public relations, public affairs, government relations, campaign management, quantitative research and advertising services for more than 20 years. The Parkside Group has played a key role in the election of more than 100 public officials and

provides survey research services to corporations, trade associations, advocacy groups, party committees, and candidates.