

**DIFFERENTIATORS** **DATA**

# Statewide NC Gaming Survey

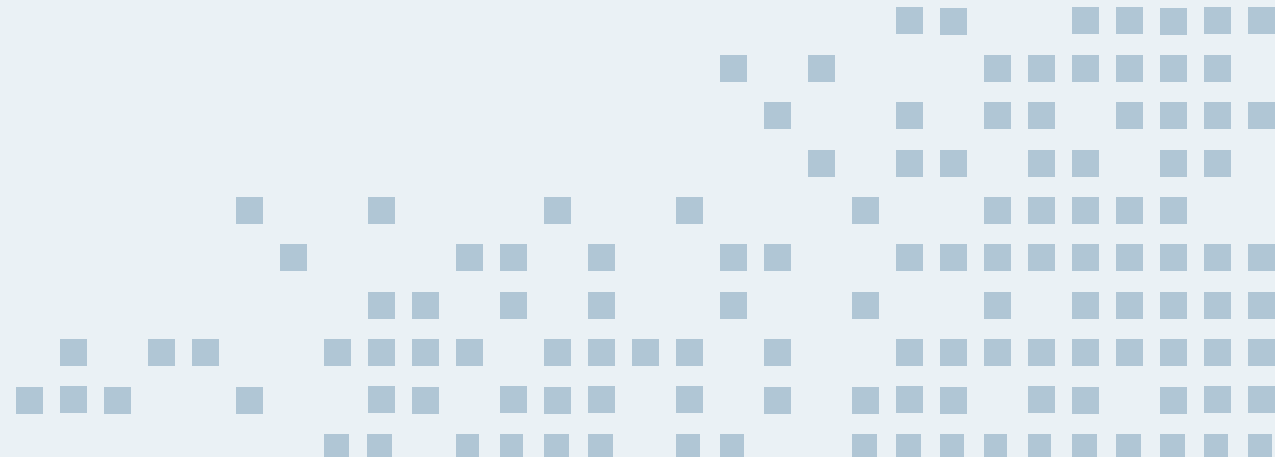
*Conducted Jan. 17-19, 2023*





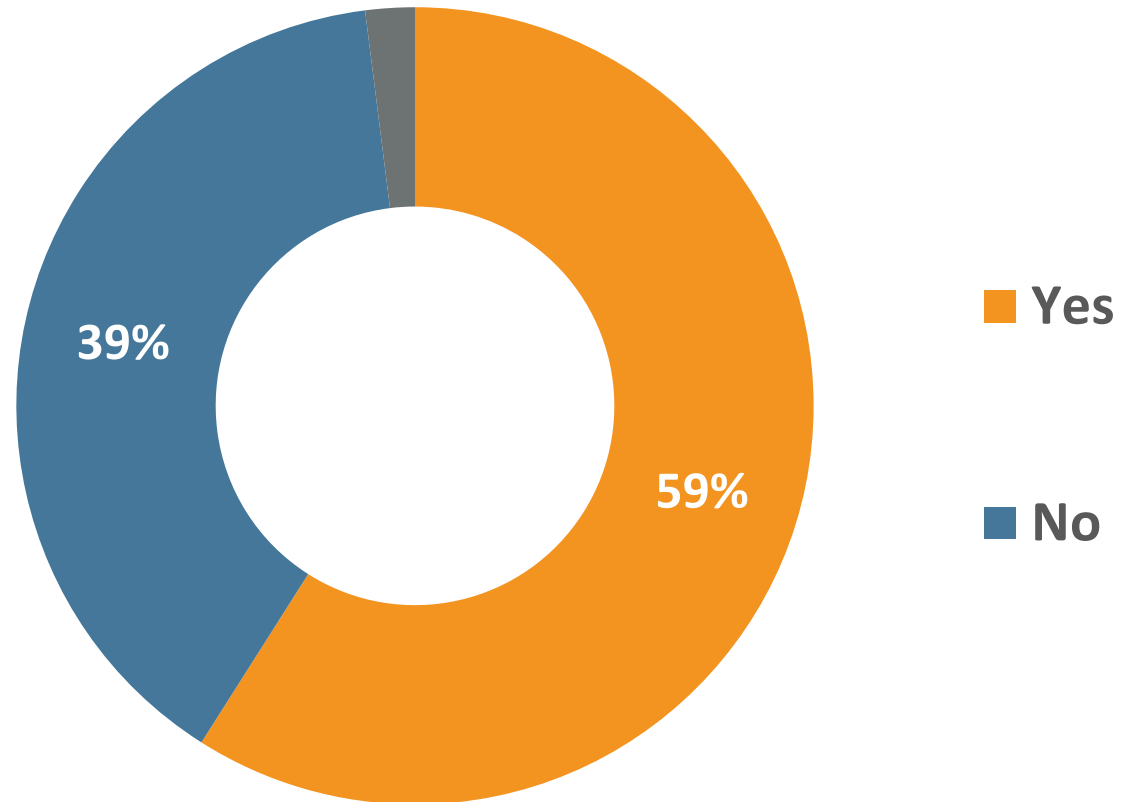
# Methodology

- Differentiators Data surveyed 600 North Carolina likely general election voters from January 17<sup>th</sup> through January 19<sup>th</sup>.
- Survey methodology: 1/3 Live Cell, 1/3 Live Landlines, 1/3 Text-to-Web.
- Margin of Error: +/- 4.5%
- For more on our polling methodology and philosophy, visit [DifferentiatorData.Com](https://DifferentiatorData.Com).



# Sports Fans

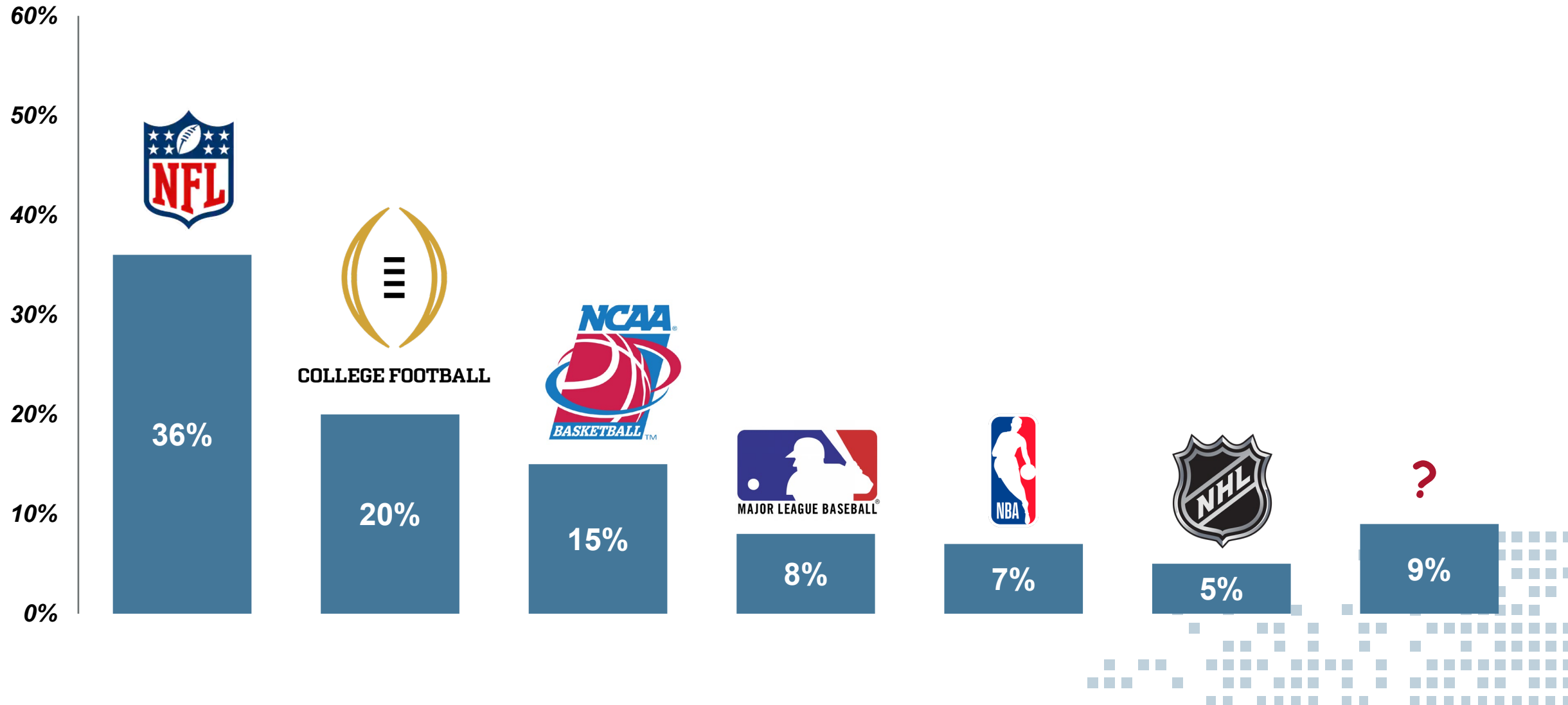
*“Would you describe yourself as a sports fan?”*



# Favorite sport?



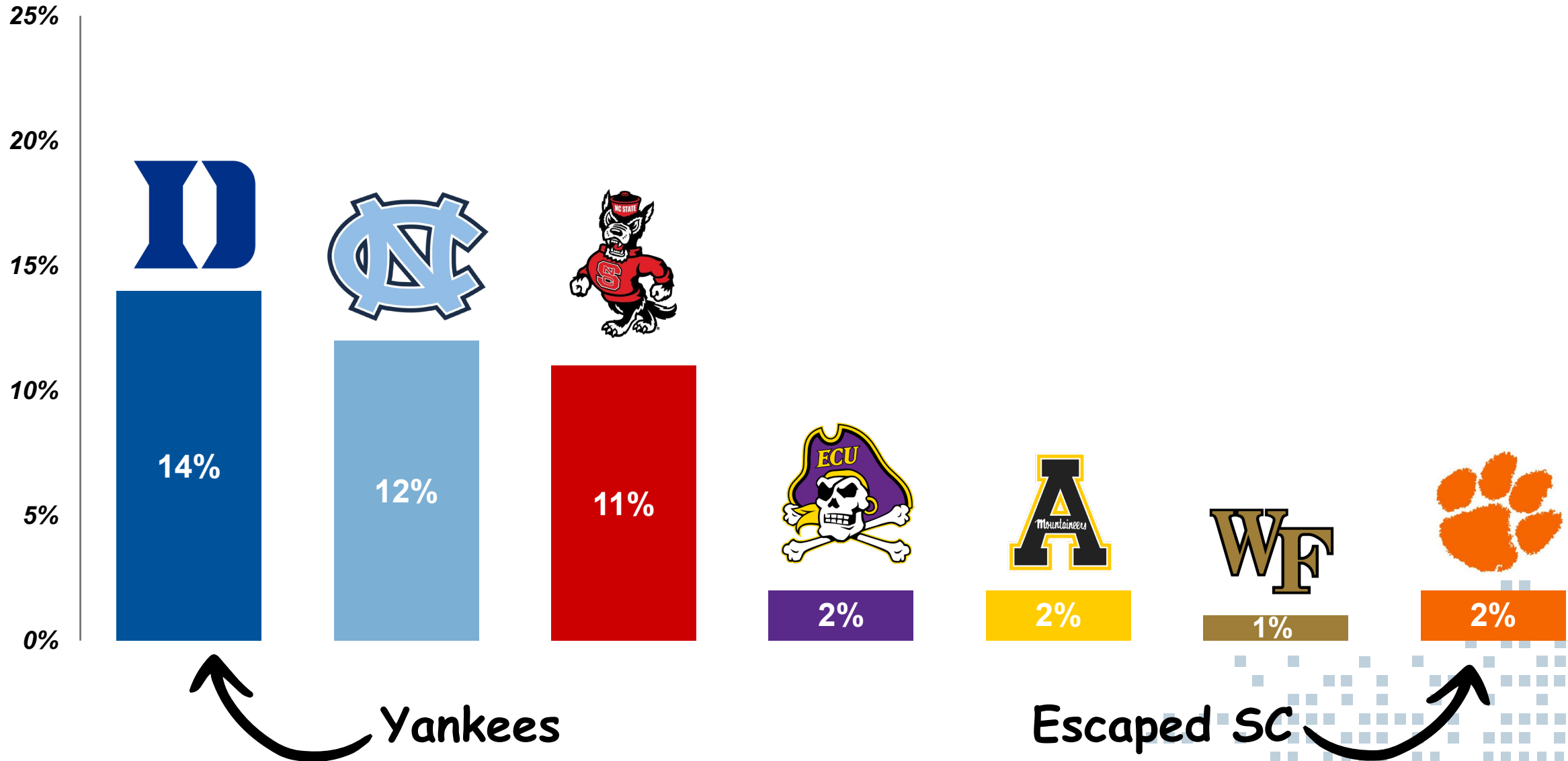
*“Which of the following is your favorite sport?”*



# Favorite college team?



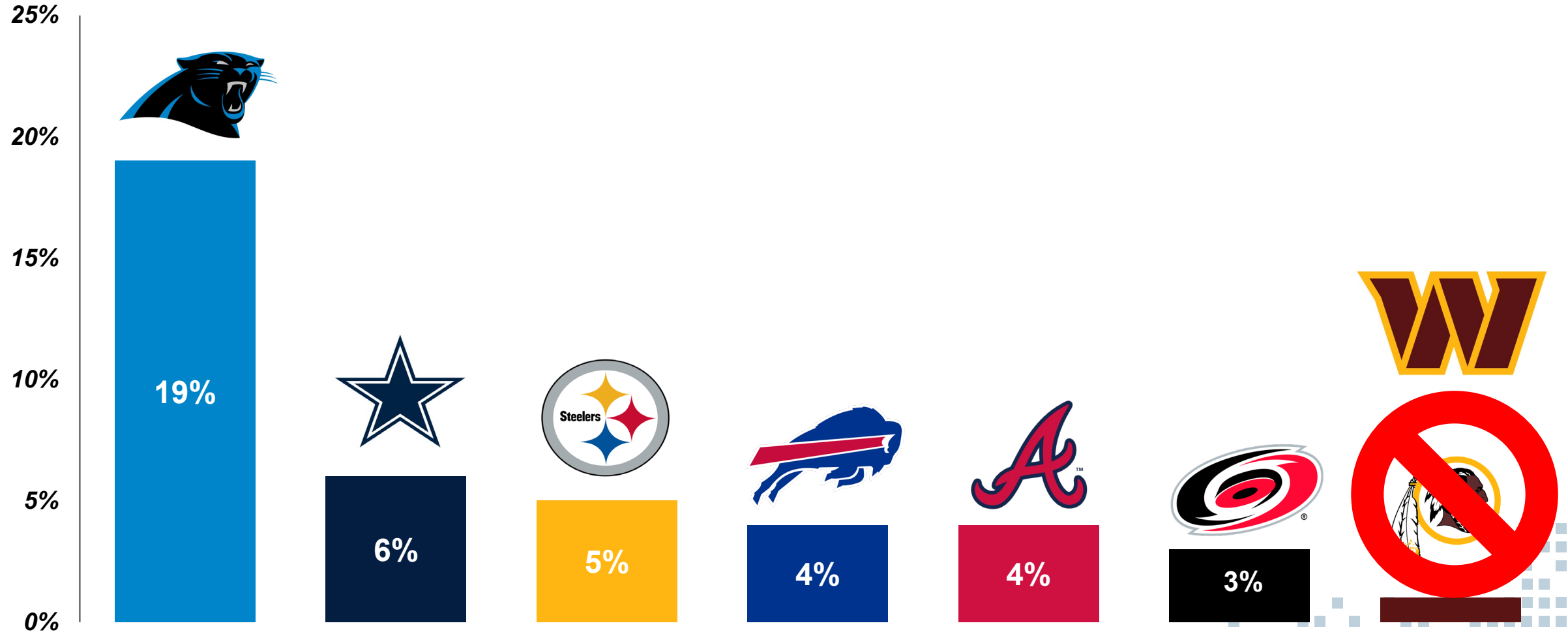
*“Please tell me your favorite college athletics team.”*



# Which pro team do you follow?



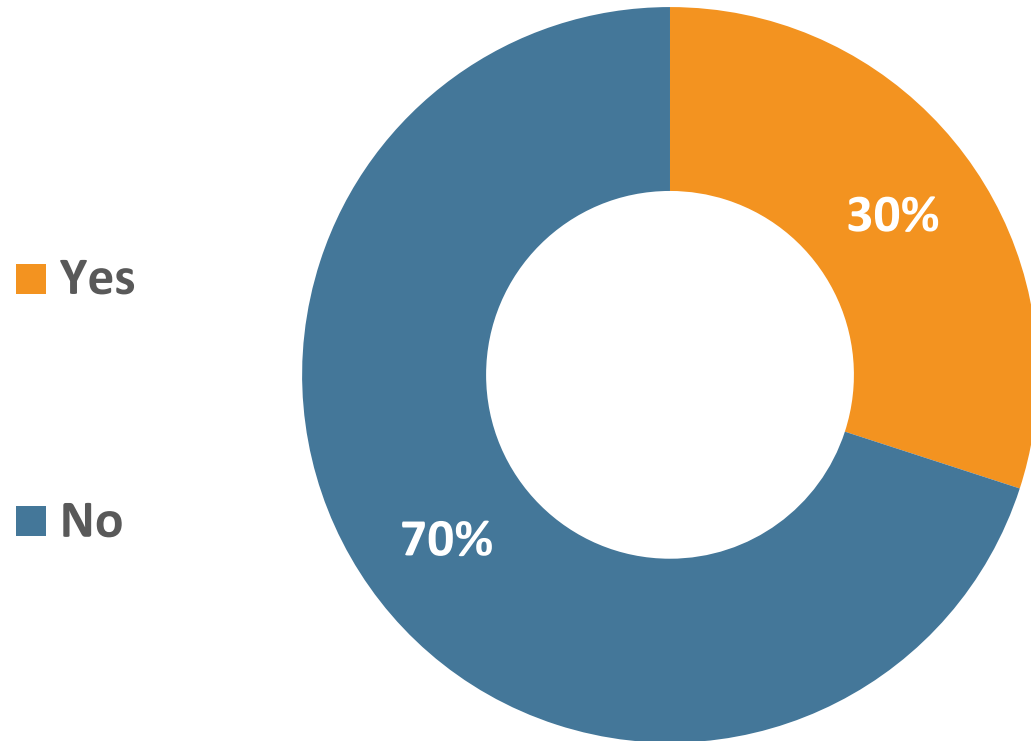
*“Please tell me what professional sports team you follow most closely.”*



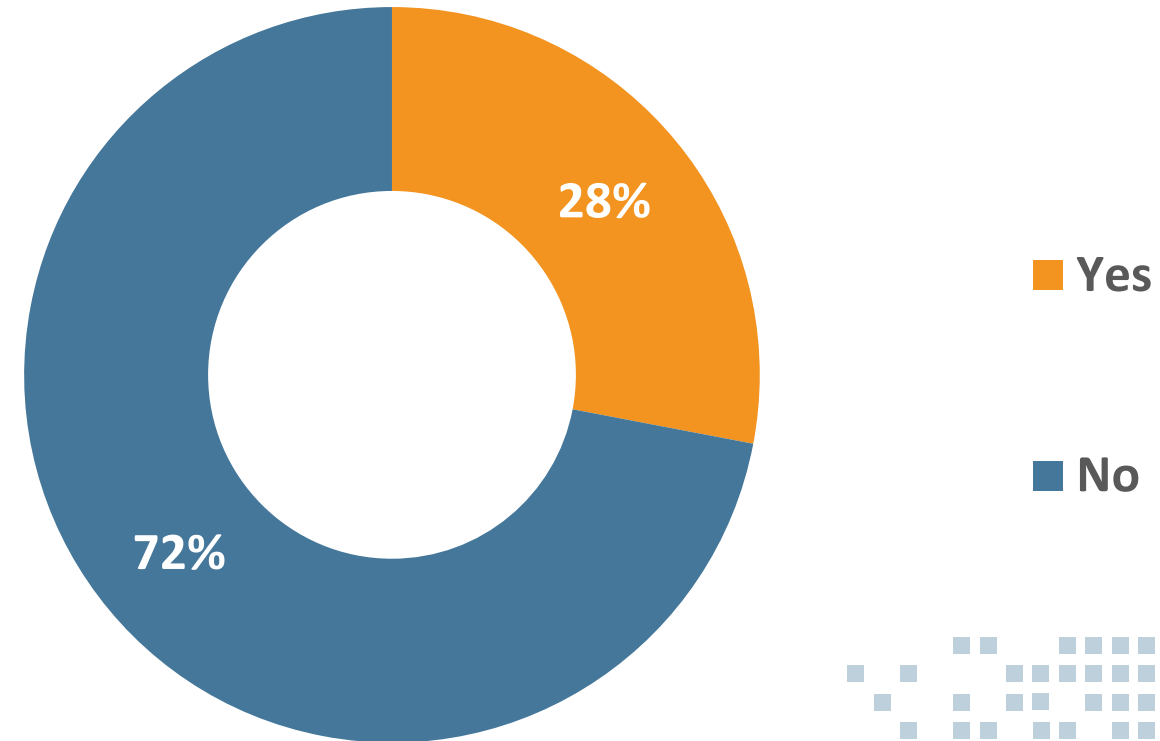
# Sporting event attendance

*“Have you attended a college/pro sporting event in NC in the past year or two?”*

***Attended Pro Event***



***Attended College Event***



# Some notes about sports fans...

- 1 Less likely to be Unaffiliated voters than non-fans
- 2 Older than non-fans
- 3 More affluent than non-fans
- 4 More likely to be African American than non-fans
- 5 Support the GOP on generic ballot 45%-43%, while non-fans back DEMs 49%-43%
- 6 More likely to vote than non-fans
- 7 More likely to live in a rural area
- 8 More likely to be male than female
- 9 More likely to support expanded gaming options than non-fans

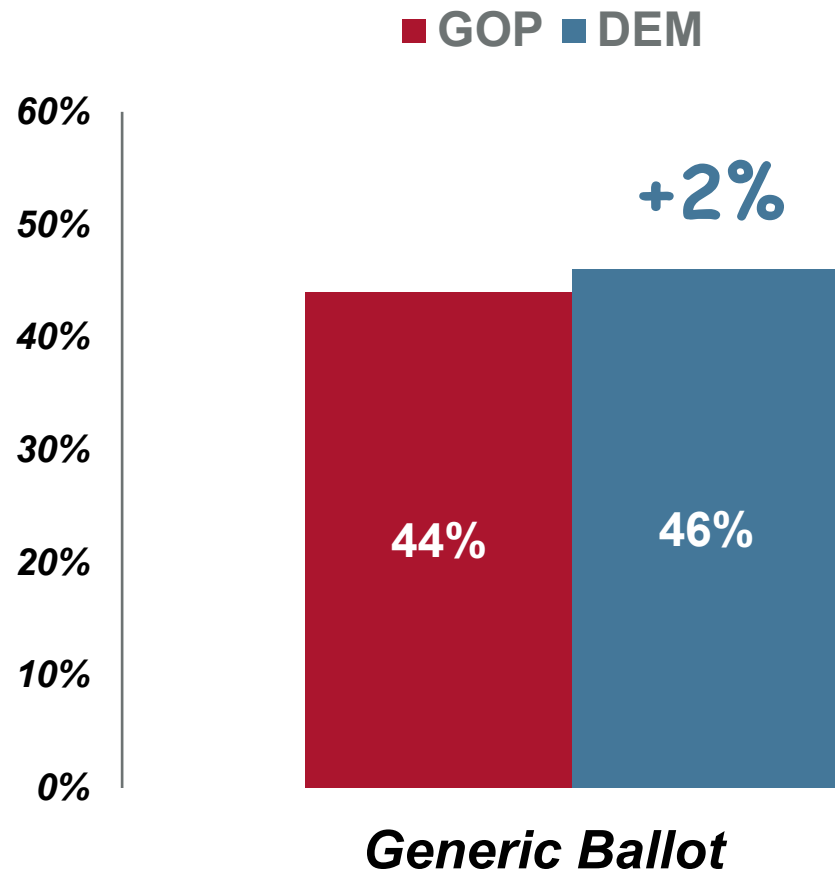




# Generic Legislative Ballot



***“If the 2024 election for state legislature in Raleigh were held today, would you vote to send the Republican or Democratic candidate to Raleigh to represent your district?”***



	GOP	DEM
<i>GOP</i>	91%	4%
<i>UNA</i>	38%	44%
<i>DEM</i>	5%	92%
<i>Female</i>	39%	52%
<i>Male</i>	51%	38%
<i>White</i>	54%	36%
<i>Black</i>	12%	81%
<i>Evangelical</i>	60%	30%
<i>Sports Fan</i>	45%	43%

# What do voters know about gaming?

To the best of your knowledge, **are there any casinos** operating in NC?

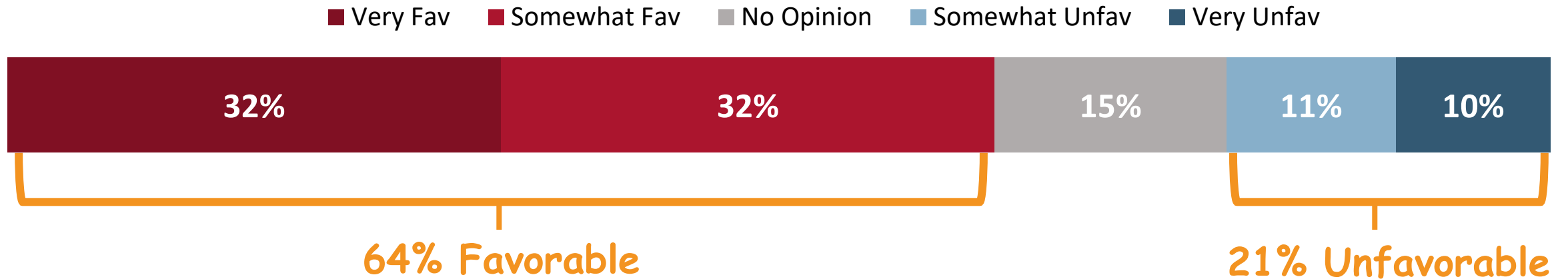


To the best of your knowledge, **is sports betting legal or illegal** in NC?



# Voters view the lottery favorably...

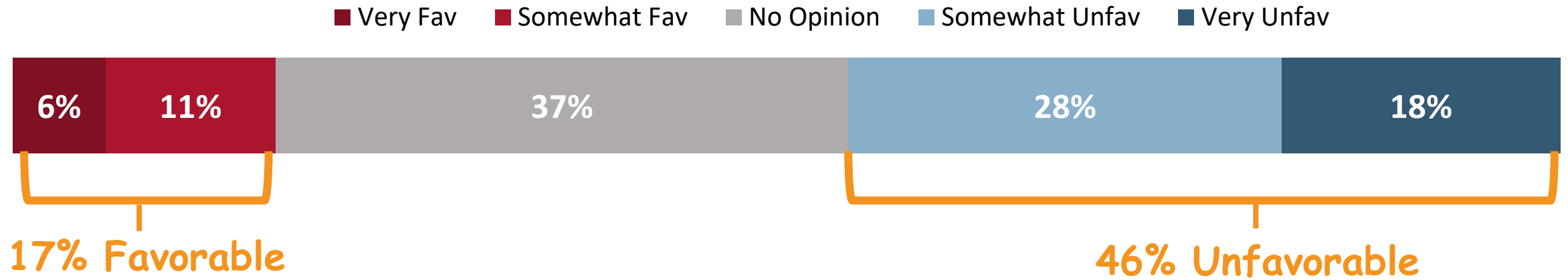
*“Tell me whether you have a favorable or unfavorable opinion of the North Carolina Education Lottery.”*



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Favorable</b>	61%	60%	72%	67%	62%	63%	72%	61%	69%
<b>Unfavorable</b>	26%	21%	16%	21%	20%	22%	18%	25%	20%

# ...and they view sweepstakes parlors unfavorably

*“Tell me whether you have a favorable or unfavorable opinion of video sweepstakes parlors.”*

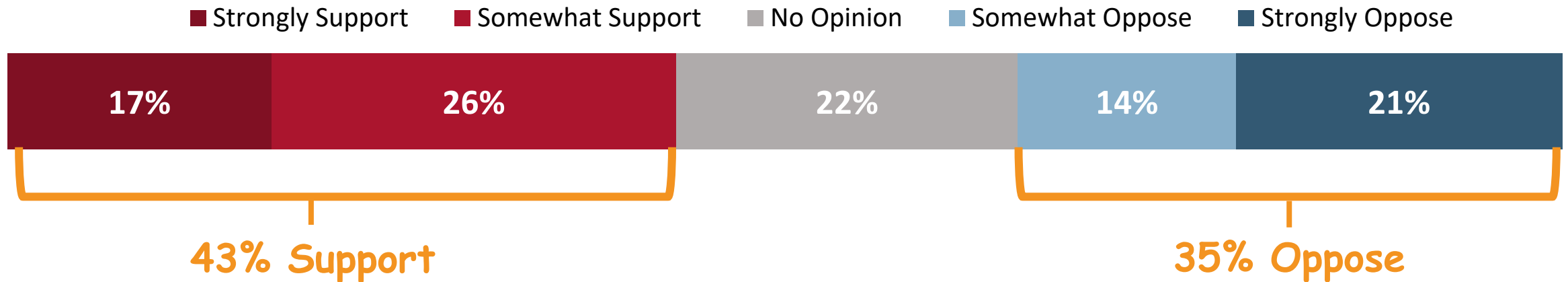


	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Favorable</b>	20%	10%	23%	17%	16%	13%	29%	17%	20%
<b>Unfavorable</b>	44%	46%	52%	47%	45%	48%	42%	53%	47%



# Voters support legalizing Sports Betting

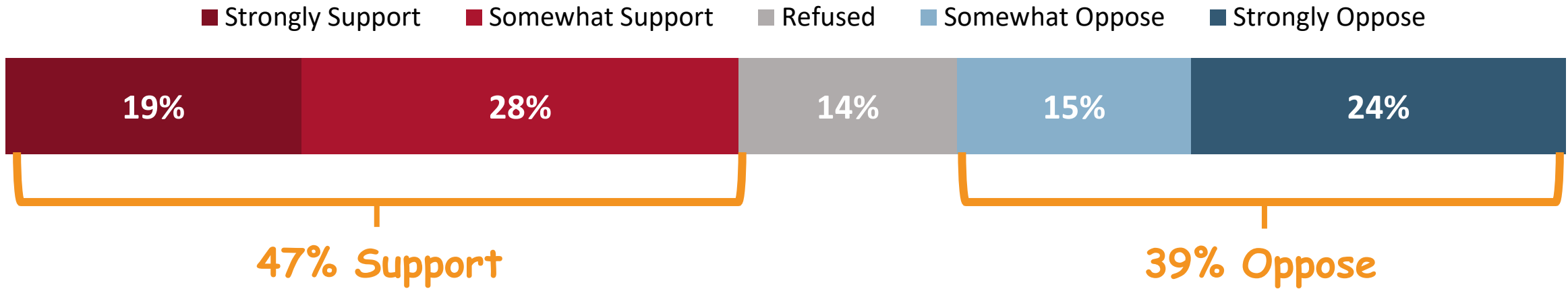
*“Tell me whether you would support or oppose the legislature legalizing and regulating sports betting?”*



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Support</b>	45%	38%	48%	52%	36%	41%	52%	38%	51%
<b>Oppose</b>	34%	34%	35%	29%	39%	34%	37%	43%	31%

# Informed, voters support legalizing Sports Betting

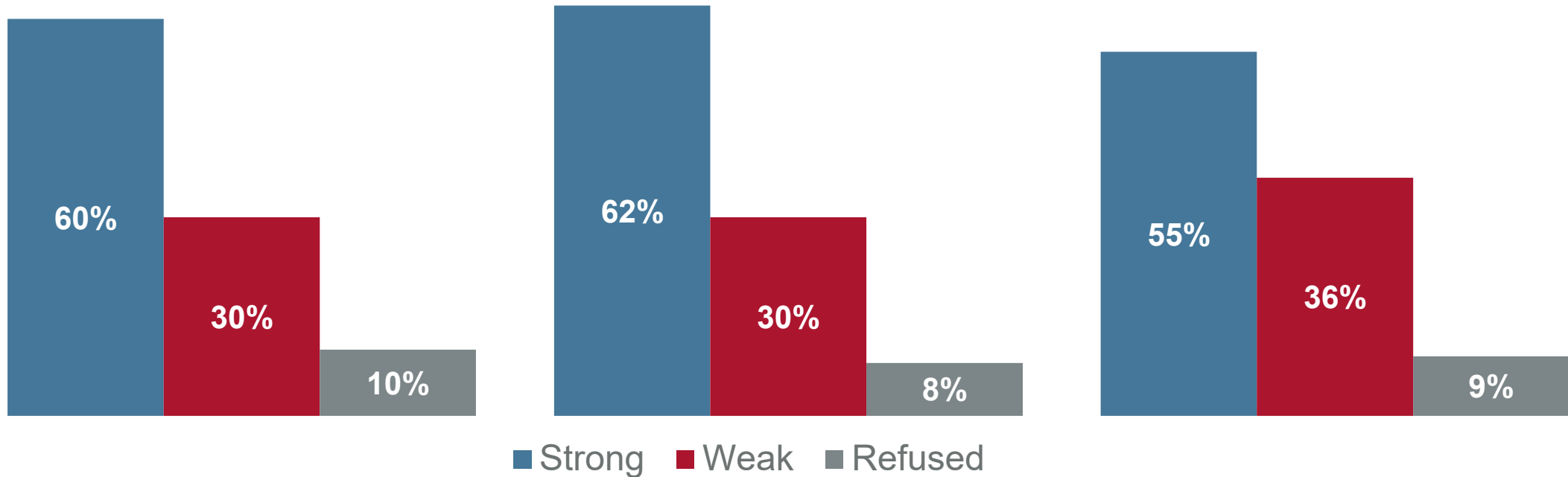
*“Sports betting is only legal in NC at the state’s three Native American tribal casinos. The legislature is considering legalizing sports betting in the rest of the state. Would you support or oppose?”*



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Support</b>	47%	43%	51%	57%	39%	44%	57%	42%	54%
<b>Oppose</b>	38%	38%	40%	31%	45%	40%	34%	45%	35%

# Effective arguments about Sports Betting

*“Tell me if you think each argument for and against legalizing sports betting is a strong or weak argument.”*



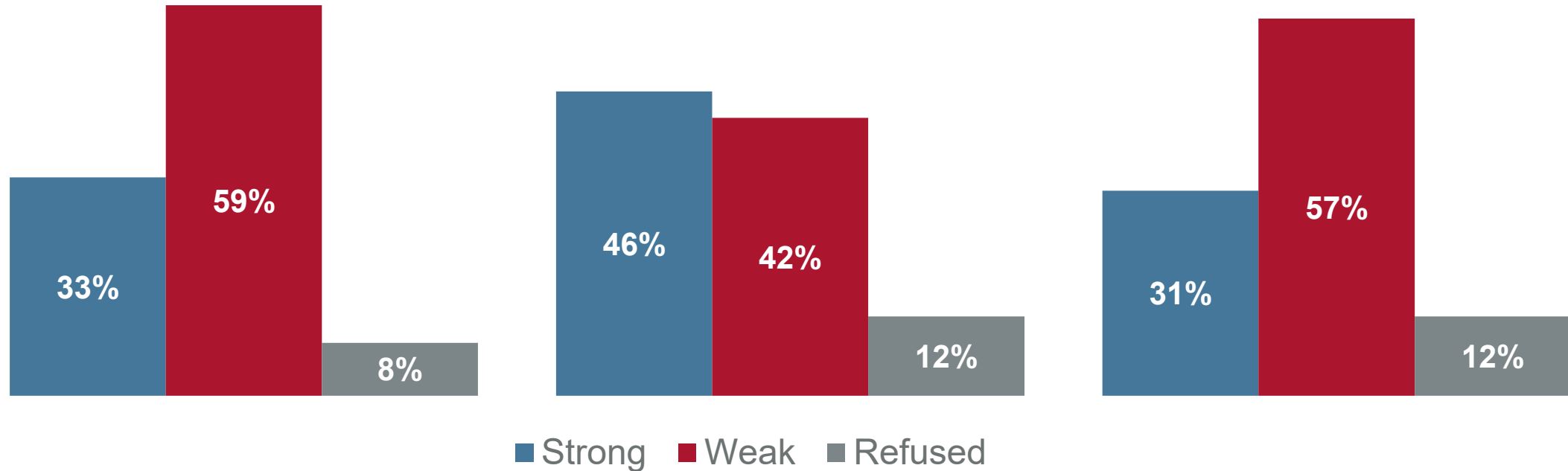
*“Recent studies show legalizing and taxing sports betting in North Carolina would generate over \$50 Million for important state programs.”*

*“Sports betting is a waste of money, can be addictive and devastate families financially.”*

*“Sports betting is a recreational activity. If an adult enjoys it they should be able to place a bet on a game. Keeping sports betting illegal unfairly criminalizes a recreation activity many North Carolinians engage in that is completely legal in most other states.”*

# Ineffective arguments about Sports Betting

*“Tell me if you think each argument for and against legalizing sports betting is a strong or weak argument.”*



*“Sports betting is a form of gambling and gambling violates both religious and moral ethics.”*

*“Legalizing sports better risks undermining the integrity of college athletics.”*

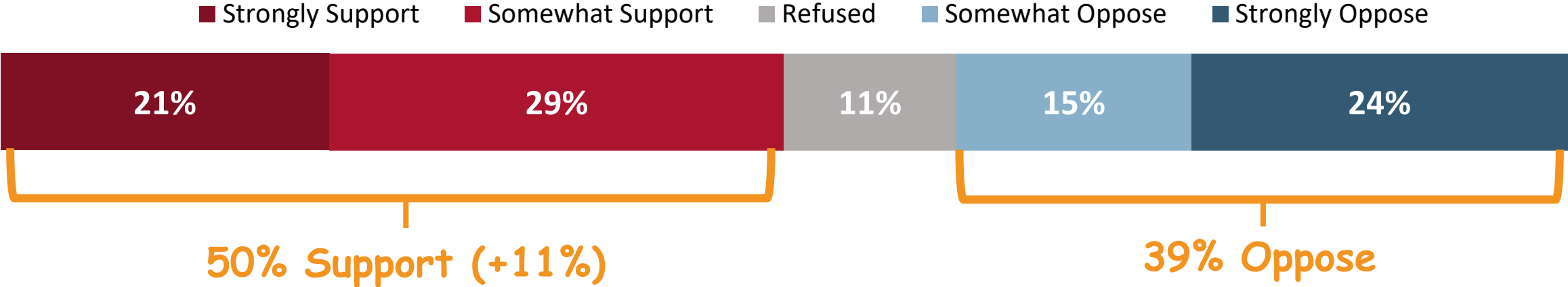
*“Legalizing sports betting at in-person locations like sports stadiums and sports bars makes sense but making it legal to place bets online is going too far.”*





# After hearing messages, voters support Sports Betting

*“Now that you’ve heard arguments for and against sports betting, would you support or oppose?”*



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Support</b>	49%	49%	53%	58%	44%	48%	58%	43%	57%
<b>Oppose</b>	41%	40%	36%	32%	45%	40%	36%	47%	35%

# Which voters moved on Sports Betting?

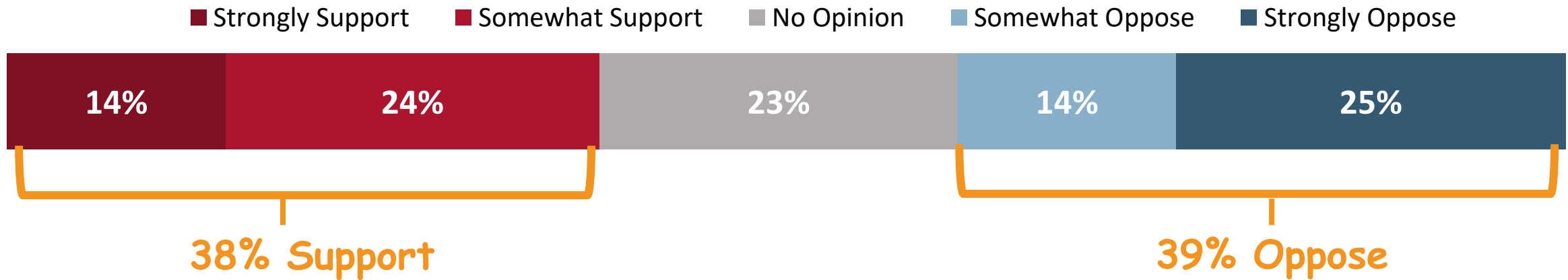


<b>UNINFORMED</b>	<b>Total</b>	<b>GOP</b>	<b>UNA</b>	<b>DEM</b>	<b>Male</b>	<b>Female</b>	<b>White</b>	<b>Black</b>	<b>Evang.</b>
Support	43.3%	44.9%	37.7%	47.5%	52.4%	35.8%	41.1%	51.6%	37.5%
Oppose	34.6%	33.9%	34.4%	35.4%	28.9%	39.2%	33.7%	37.4%	43.4%
<b>INFORMED</b>	<b>Total</b>	<b>GOP</b>	<b>UNA</b>	<b>DEM</b>	<b>Male</b>	<b>Female</b>	<b>White</b>	<b>Black</b>	<b>Evang.</b>
Support	47.0%	47.4%	43.1%	50.5%	56.8%	38.9%	44.2%	57.2%	42.1%
Oppose	38.7%	37.8%	38.3%	39.9%	31.4%	44.6%	40.0%	34.3%	44.9%
<b>POST-MESSAGES</b>	<b>Total</b>	<b>GOP</b>	<b>UNA</b>	<b>DEM</b>	<b>Male</b>	<b>Female</b>	<b>White</b>	<b>Black</b>	<b>Evang.</b>
Support	50.3%	48.8%	48.9%	53.1%	58.3%	43.7%	48.0%	57.9%	42.9%
Oppose	39.2%	41.0%	40.2%	36.3%	32.1%	45.0%	40.3%	35.7%	47.3%
<b>MOVE TO SUPPORT</b>	7%	3.9%	11.2%	5.6%	5.9%	7.9%	6.9%	6.3%	5.4%

# Voters are evenly divided on the Education Lottery offering Video Lottery Games



*“Tell me whether you would support or oppose the NCGA authorizing the North Carolina Education Lottery to offer new video lottery games.”*



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Support</b>	35%	33%	<b>46%</b>	41%	35%	36%	47%	35%	43%
<b>Oppose</b>	43%	40%	36%	41%	38%	40%	37%	<b>46%</b>	37%

# When informed, voters support taxing and regulating Video Lottery Games over banning them



*“Most video sweepstakes are illegal in NC but continue to operate... Do you think state legislators should pass a law to tightly regulate, oversee and tax video sweepstakes or pass a law to permanently ban all video sweepstakes games?”*

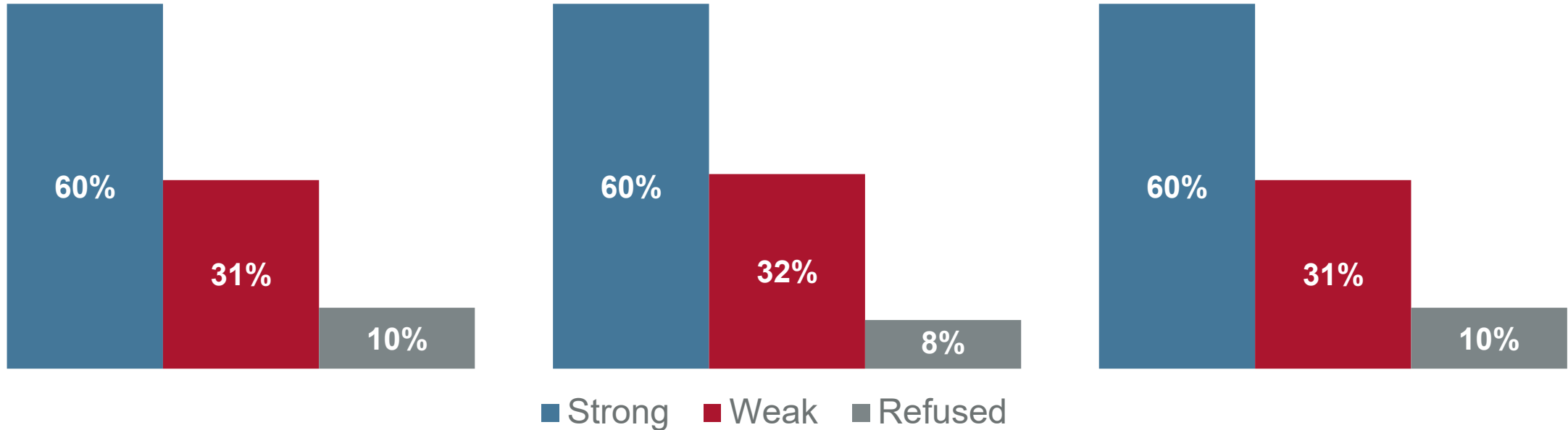
■ Regulate and Tax ■ No Opinion ■ Permanently Ban



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Regulate/Tax</b>	52%	51%	59%	54%	54%	50%	66%	49%	57%
<b>Permanent Ban</b>	31%	27%	23%	29%	25%	31%	20%	35%	27%

# Effective arguments about Video Lottery Gaming

*“Tell me if you think each argument for and against video lottery gaming is a strong or weak argument.”*



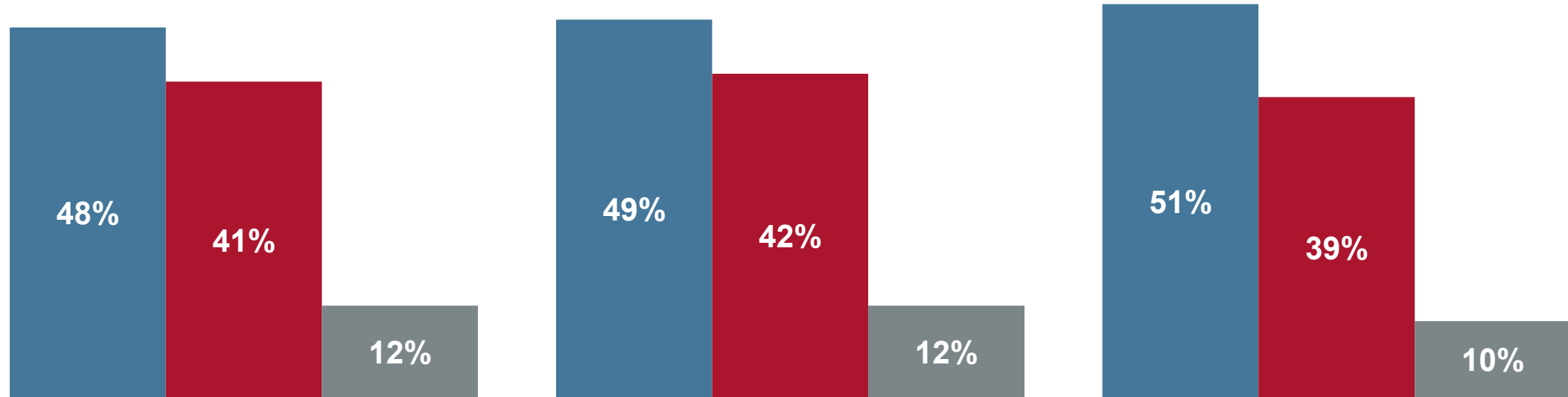
*“Unregulated and illegal video sweepstakes parlors generate crime in communities and pay no taxes. Legislators should authorize the NC Education Lottery to offer new, regulated and taxed video lottery games and permanently shut down illegal sweepstakes parlors to reduce crime.”*

*“Allowing new video lottery games will tempt the people who can least afford it to play the lottery and lead to more problem gambling.”*

*“If the lottery offers new video lottery games, the games will be subject to strict regulations to keep children from playing and to protect problem gamblers. There will be a limit on how much a person can play each week, no more than five game terminals could be placed in any location, only businesses with a license to sell alcohol will be allowed to host the games and the games will have to be in an area that is not accessible to minors.”*

# Ineffective arguments about Video Lottery Gaming

*“Tell me if you think each argument for and against video lottery gaming is a strong or weak argument.”*



■ Strong ■ Weak ■ Refused

*“Most other states offer video lottery games and many illegal or unregulated video sweepstakes games already operate in NC. Legislators should step out of the past and authorize...”*

*“The NC Education Lottery is already legal and if lottery customers want new video lottery games the lottery should offer them. The state needs to stop trying to tell adults who are responsible for their own decisions what they can and can’t do.”*

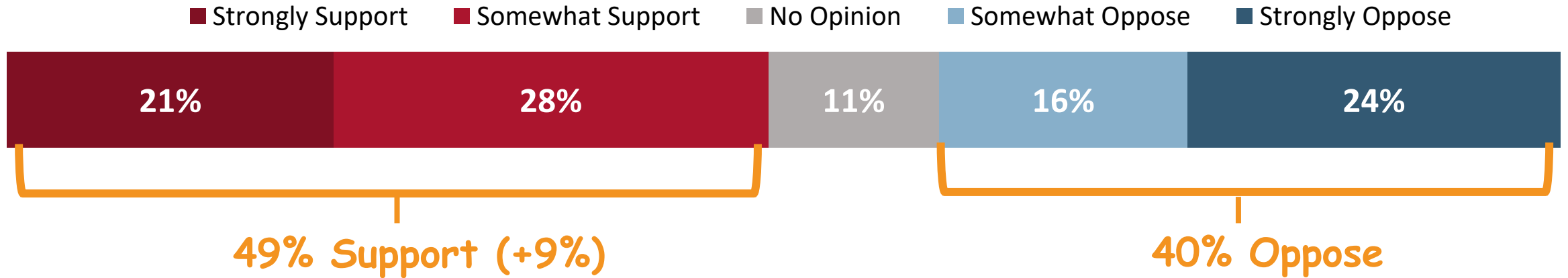
*“If the NC Education Lottery was authorized to offer new video lottery games it would provide restaurants, bars, convenience stores, charitable lodges and other small business owners with a new way to supplement their income.”*



# After hearing messages, voters support the Education Lottery offering Video Lottery Games



*“Now that you’ve heard arguments from both sides, would you support or oppose the state legislature authorizing the North Carolina Education Lottery to offer video lottery games?”*



	GOP	UNA	DEM	Male	Female	White	Black	Evangelical	Sports Fan
<b>Support</b>	47%	50%	50%	53%	46%	46%	53%	45%	54%
<b>Oppose</b>	43%	40%	40%	38%	41%	42%	38%	45%	37%

# Which voters moved on Video Lottery Gaming?



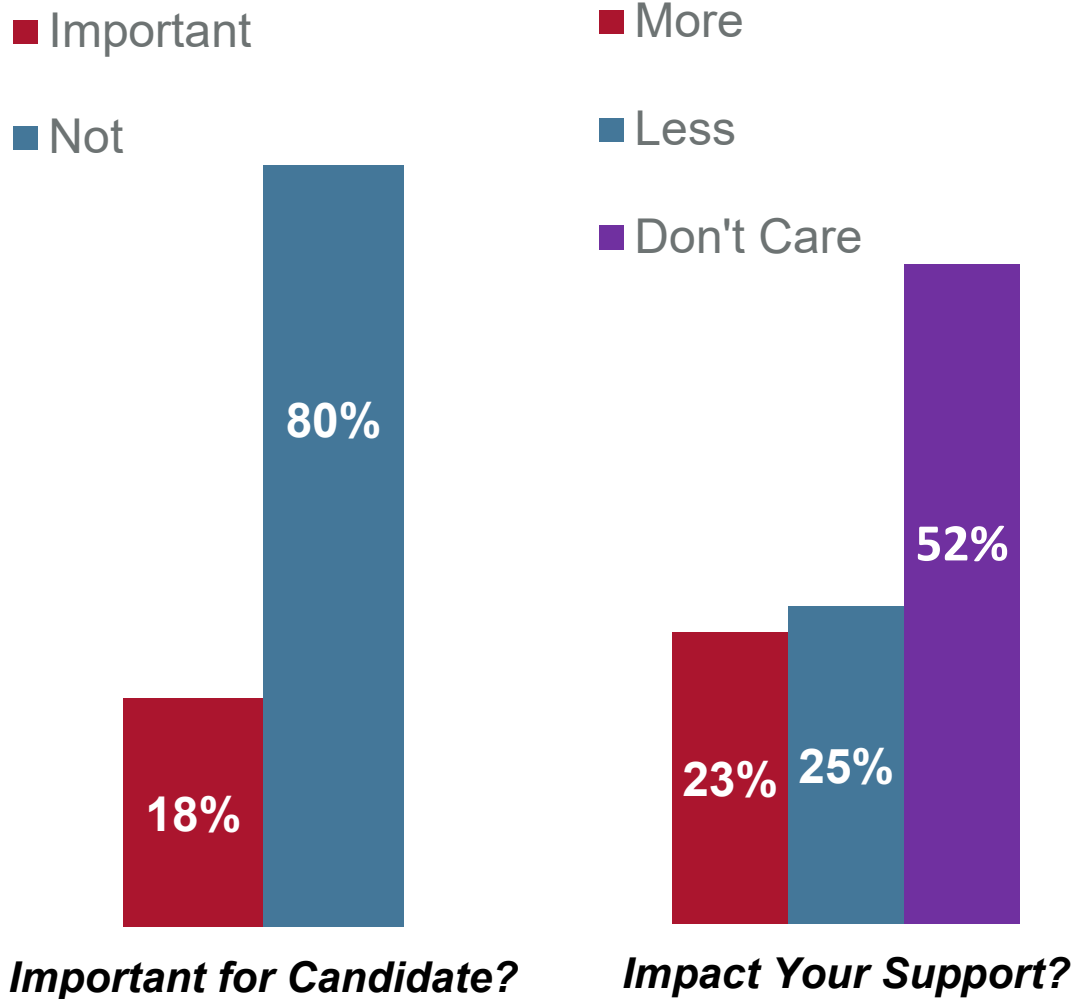
<i>UNINFORMED</i>	Total	GOP	UNA	DEM	Male	Female	White	Black	Evang.
Support	37.8%	35.3%	32.8%	45.6%	41.4%	34.9%	36.1%	47.1%	35.2%
Oppose	39.6%	42.9%	39.6%	36.2%	41.2%	38.2%	39.7%	37.2%	46.0%
<i>INFORMED</i>	Total	GOP	UNA	DEM	Male	Female	White	Black	Evang.
Support	54.0%	52.2%	50.7%	59.1%	53.6%	54.3%	50.2%	65.9%	48.7%
Oppose	26.8%	30.6%	26.7%	23.2%	28.6%	25.4%	30.8%	19.8%	34.6%
<i>POST-MESSAGES</i>	Total	GOP	UNA	DEM	Male	Female	White	Black	Evang.
Support	49.1%	46.8%	50.3%	50.2%	53.4%	45.6%	46.0%	53.1%	45.2%
Oppose	40.0%	42.5%	39.9%	39.9%	38.4%	41.4%	41.5%	38.2%	44.9%
<b>MOVE TO SUPPORT</b>	11.3%	11.5%	17.5%	4.6%	12%	10.7%	9.9%	6%	10%



# And MOST importantly...



**Gaming issues are NOT important to voters. A majority says gaming would have no impact on their vote.**



	Important		Candidate Support		
	+	-	More	Less	🙄
<b>GOP</b>	23%	75%	27%	26%	47%
<b>UNA</b>	15%	83%	21%	26%	53%
<b>DEM</b>	16%	82%	22%	22%	56%
<b>Female</b>	18%	79%	19%	26%	56%
<b>Male</b>	18%	81%	29%	24%	47%
<b>White</b>	17%	81%	22%	18%	50%
<b>Black</b>	20%	78%	28%	17%	56%
<b>Evangelical</b>	24%	74%	24%	29%	47%
<b>Sports Fan</b>	19%	79%	29%	24%	47%

# Data Dispel Three Big Gaming Myths

1

**Myth:** Voters are opposed to expanding gaming options in North Carolina.

**Data:** Voters generally favor or are neutral on expanding gaming, and the better educated they are on the issue, the more they support it.

2

**Myth:** Gaming expansion is a politically polarizing issue.

**Data:** All three voter registration groups express similar levels of support for expanding gaming. The biggest points of polarization on the issue fall along lines of gender and sports fandom.

3

**Myth:** Voting for gaming expansion will make me lose my election.

**Data:** Gaming expansion is not a deciding issue for voters. But the things that could be done with a large new revenue source – cutting taxes, expanding popular programs, or funding local infrastructure – can be deciding issues for voters.

