



TO Interested Parties

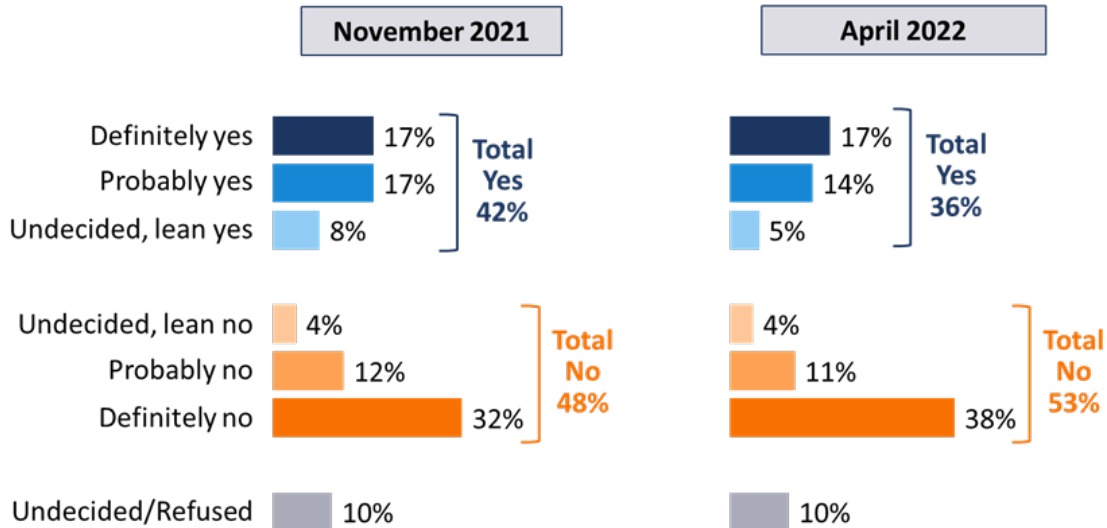
FROM Dave Metz and Rick Sklarz
FM3 Research

RE: Poll: CA Voters Oppose Corporate Online Sports Wagering Initiative

DATE April 19, 2022

This memo highlights key findings from a survey¹ of 1,094 California voters fielded in April to assess opinions toward the online sports wagering ballot initiative (#21-0017A1) sponsored by out-of-state gambling corporations, including DraftKings and FanDuel. Figure 1 below shows that **based on the measure’s official Title and Summary as prepared by the Office of the Attorney General, a 53% majority initially opposes the initiative, roughly one-third (36%) favor it, and 10% are undecided.** Notably, if the election were held today, more than twice as many respondents say they would “definitely” vote No (38%) as would “definitely” vote Yes (17%) to allow corporate operators to offer online sports wagering. Furthermore, opposition to the initiative has increased since November 2021, when 42% indicated support, 48% opposition and 10% were undecided.

Figure 1: Vote on Corporate Online Sports Wagering Ballot Initiative Title & Summary



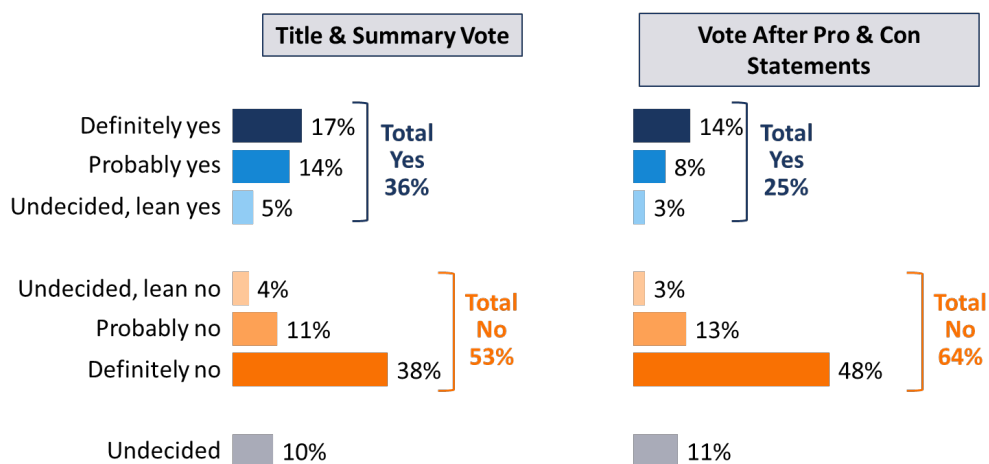
To simulate a competitive campaign environment with paid advertising, the survey presented respondents with an equal number of statements from proponents and opponents of the measure – five Yes messages and five No messages. To eliminate a biasing effect, the order of these statements was rotated so that half of the respondents were given Yes statements first then No statements; the other half heard No statements first then Yes statements.

Statements in support of the corporate online initiative – taken directly from the proponents’ campaign materials – failed to elicit strong reactions from voters and did not provide compelling reasons to vote in favor of the measure. This includes proponents’ arguments that online sports wagering would generate a permanent source of funding to invest in programs to reduce homelessness and expand mental health services.

Opposition statements are much more persuasive to voters and resonate as highly convincing reasons to vote No. Messages voters find most convincing illustrate the dangers unique to online sports wagering – it is highly addictive, sends revenue out of California, and increases the risks of underage gambling. Voters also find arguments raising concerns about the State’s homeless spending as highly convincing. Similarly, seven in ten are skeptical after learning that most of the state’s Native American tribes oppose the initiative because it primarily benefits out-of-state corporations and undermines Indian gaming in California.

Following the statements from both sides, voters were asked again to vote on the corporate online initiative. As **Figure 2** shows, nearly two-thirds (64%) vote No, including almost half (48%) who say they would “definitely” vote No. After these statements, support declines by 11 points to one in four voters (25%), while one in ten (11%) remain undecided.

Figure 2: Vote on Corporate Online Sports Wagering Initiative After Pro & Con Statements



In sum, a majority of California voters initially oppose the corporate online sports wagering initiative when presented with the official Title & Summary prepared by the Attorney General’s office. The survey results also show that arguments opposed to the proposed initiative are much more persuasive than are proponents’ statements in favor. This survey’s findings, which are in line with prior statewide research, consistently show California voters to have significant concerns about legalizing online forms of gambling and continue to regard the idea with a great deal of skepticism. Therefore, in a competitive campaign environment in which supporters and opponents spend similar amounts to communicate their messages, these survey results suggest voters will reject the corporate operators’ ballot initiative by a significant margin.

ⁱ **Survey Methodology:** From April 6-13, 2022, FM3 conducted a survey of 1,094 California voters likely to cast a ballot in the November 2022 statewide election. The survey was commissioned by the Coalition for Safe, Responsible Gaming. Respondents were contacted via text messaging, email and telephones and interviews were conducted online and via landline and cell/mobile telephone by live interviewers. Interviews were conducted in English and Spanish. The sample margin of error for the results is +/-3.1% at the 95% confidence level; the margin of error for population subgroups will be higher. Due to rounding, some percentages may not sum to 100%.