Patron and License Plate Survey Report: Plainridge Park Casino 2016

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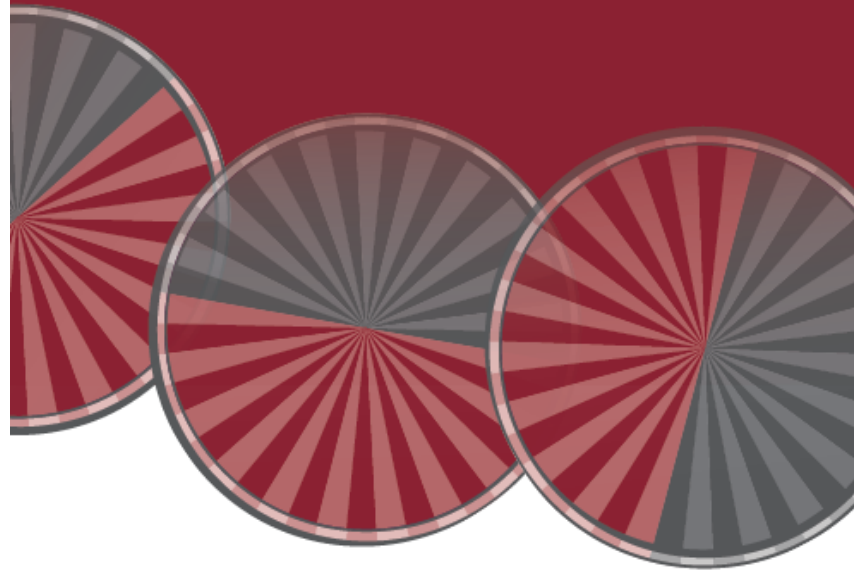
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October 26, 2017

INTRODUCTION

Goals/Objectives of SEIGMA

- Measure and determine impacts of casino facilities at the local, regional and state level
  - Social & health impacts
  - Economic & fiscal impacts

Phases of Analysis

- Baseline analyses
  - Tracking conditions before gaming facilities
- Development/Construction
  - Measuring impacts as construction occurs at each gaming facility
- Operations
  - Measuring and monitoring impacts from operations of gaming facilities

SEIGMA's Main Areas

Social & Health Impacts

- General population surveys
- Targeted population surveys
- Online panel surveys
- Secondary data collection & analyses

Economic & Fiscal Impacts

- REMI modeling using primary & secondary data
- Community comparison analysis
- Profiles of host communities
- Real estate data analysis

Plainridge Park Casino (PPC)

- Opened on June 24, 2015 and operated by Penn National Gaming, PPC in Plainville MA offers seasonal harness racing, simulcast race wagering, 1,250 slot machines, several electronic table games, multiple MA lottery ticket terminals, and several food and beverage outlets

Photo credit: Boston Globe

Patron survey was a joint effort

Social Impact Team:

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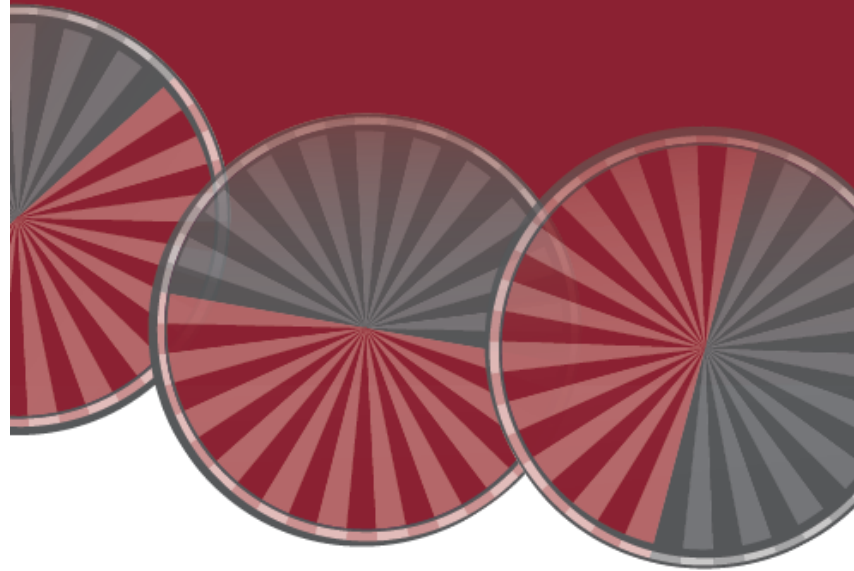
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PLAINRIDGE PARK CASINO
PATRON SURVEY

PATRON SURVEY

Purposes

- The geographic origin and demographic characteristics of people patronizing MA casinos
- The amount of monetary recapture
- The amount of casino patron spending on other on-site and off-site amenities
- The extent to which casino-related spending is reallocating money that would have been spent on other activities and products
- Patrons' perceptions and experience with the new venues
- Awareness and impact of the GameSense program

Survey methods and logistics

- We used a unique methodology to make the sample as representative as possible

Survey Day	Day of Week	Date	Time	# Surveys
1	Saturday	2/20/16	12-4 pm	75
2	Monday	2/22/16	6-10 pm	38
3	Saturday	2/27/16	6-10 pm	115
4	Monday	2/29/16	12-4 pm	45
5	Saturday	7/30/16	12-4 pm	49
6	Monday	8/1/16	6-10 pm	44
7	Saturday	8/6/16	6-10 pm	68
8	Monday	8/8/16	12-4 pm	45
Total				479

Recruitment

- Teams of 3-6 UMass surveyors were stationed at each exit
- **The Counter**: Tallied all exiting patrons
- **The Solicitor**: Asked every 6th exiting patron to participate in a self-administered 5-10 minute survey (with a $5 Dunkin Donuts incentive)
  - Refusing patrons tallied by gender, age, and race
- **The Table Monitor**: Completed the transaction with the patron
- A total of 2,136 patrons were approached, with 479 patrons participating for a response rate of 22.4%
  - Response rate for individual questions were all above 88.5%
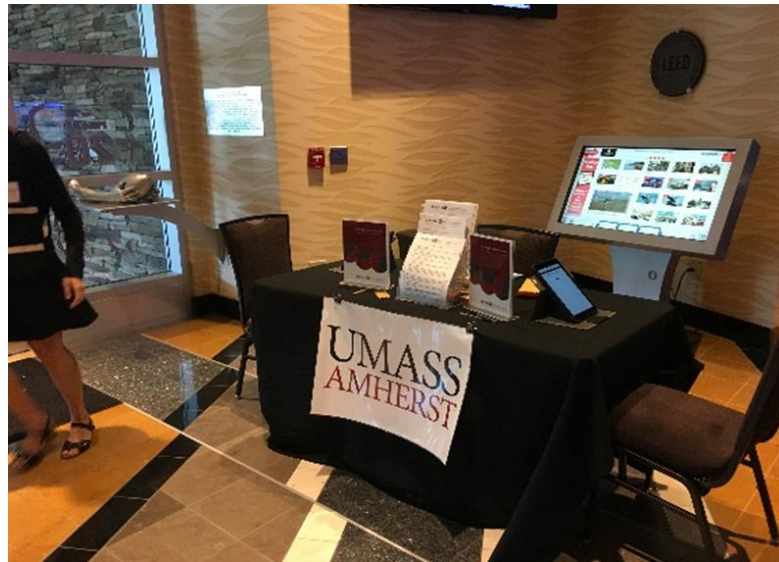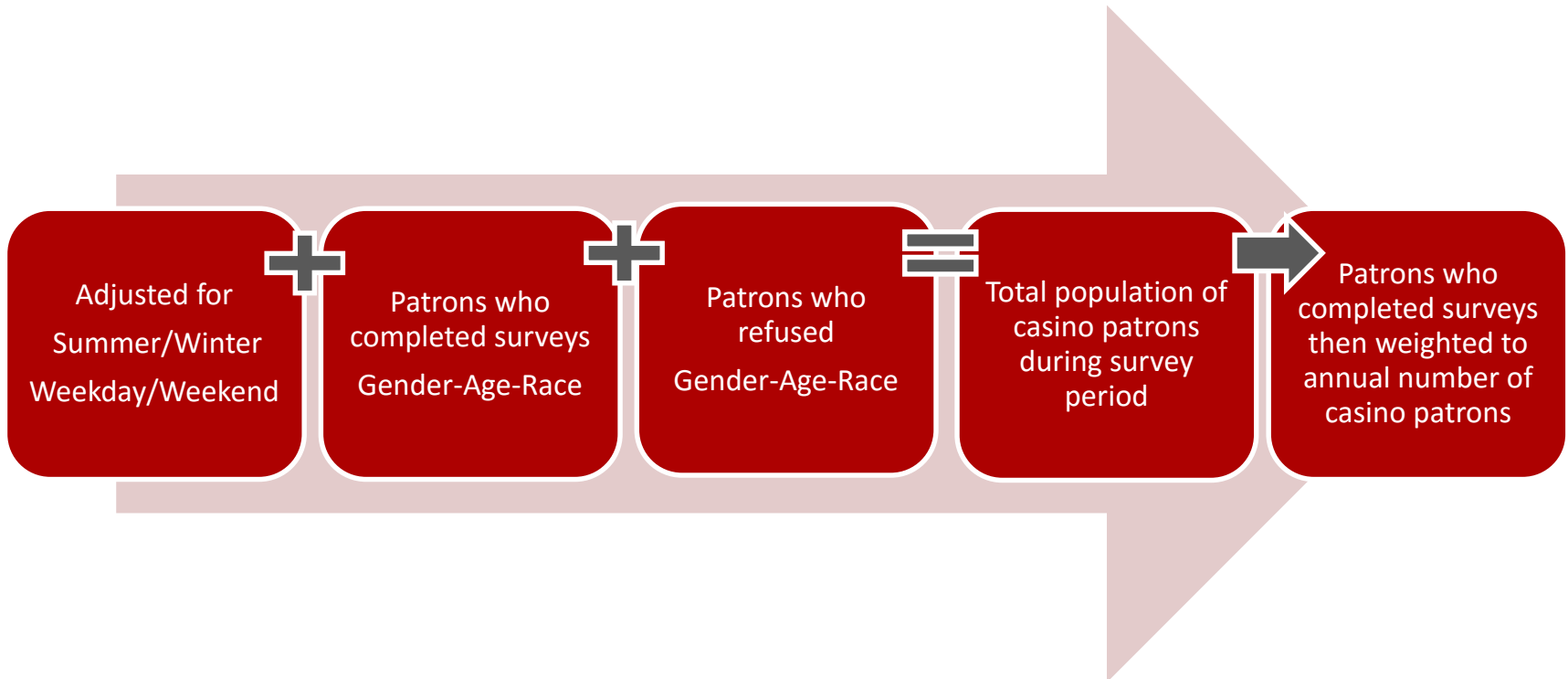
Questionnaire

- The survey questionnaire contained 5 main sections:
  - Demographics
  - Access to and experience in the venue
  - Activities engaged in while at the venue
  - Activities participated in outside of the venue during the visit
 - Experience with the GameSense Program

Weighting

- The purpose of weighting is to correct for sampling biases due to season/day of week and because certain people are more or less likely to participate

Adjusted for Summer/Winter Weekday/Weekend **+** Patrons who completed surveys Gender-Age-Race **+** Patrons who refused Gender-Age-Race **=** Total population of casino patrons during survey period **→** Patrons who completed surveys then weighted to annual number of casino patrons

Results

- Data was collected during winter and summer to account for any seasonal differences in patronage

- In our report, we included all data by summer, winter, and combined
  - While there were some significant differences in several areas, these tended to be small in magnitude so here we present the combined results

- The fact that many significant differences were found confirms the importance of conducting future surveys in both winter and summer for each gaming facility in the state

Geographic origin of patrons
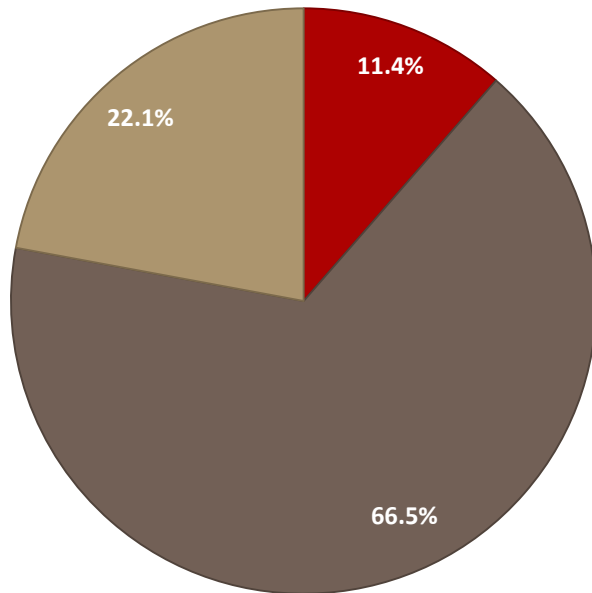
- Host or surrounding community
- Other municipalities in MA
- Outside of MA or unknown

11.4%
22.1%
66.5%

Wrentham
Forborough
Plainville
Mansfield
North Attleborough
Attleboro

Patron demographics

- Fairly evenly split between male and female
- 81.8% were white
- Mean age was 56
- 78.4% had "some college" or higher
- 59.1% employed and 30.5% retired
- Total annual household income was variable
  - 30.1% under $50K
  - 40.2% $50-100K
  - 29.6% over $100K

Frequency of visits

- 39.3% of patrons reported visiting once a week or more while 30.6% reported visiting 1-3 times a month
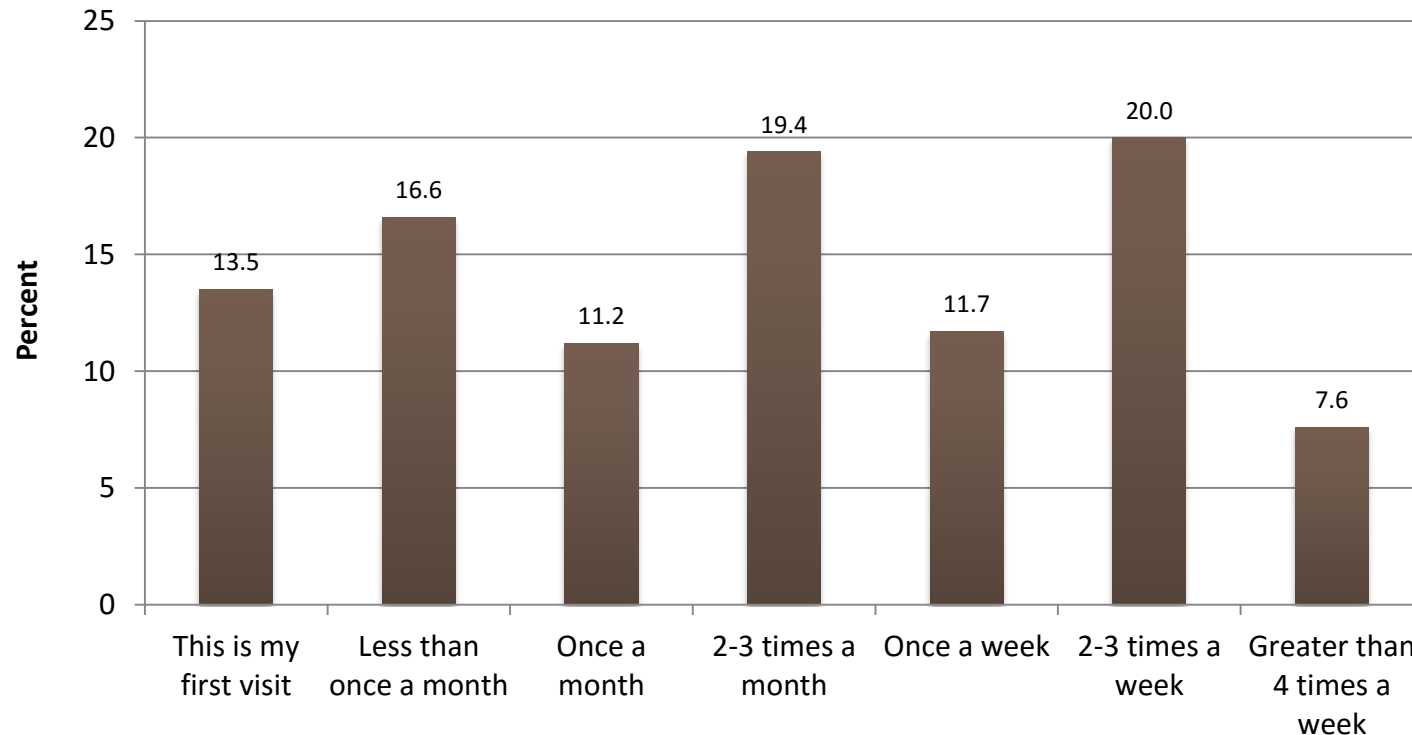
Visit information

- About 64% of patrons reported PPC prompted them to visit Plainville and/or MA
  - Patrons from MA much more likely to visit because of the casino compared to those not from MA (69.5% vs. 46.6%)
- Out-of-state patrons overall visited MA for 3.4 days, with 55% staying for 1 day or less
- The majority of patrons (87.2%) reported having an enjoyable experience and most (83.8%) would return again

Gambling activities

- Gambling was the clear motivating factor to visit PPC
  - Overall, 78% of patrons were loyalty card members (83% of slot players vs. 47% of horse racing patrons)
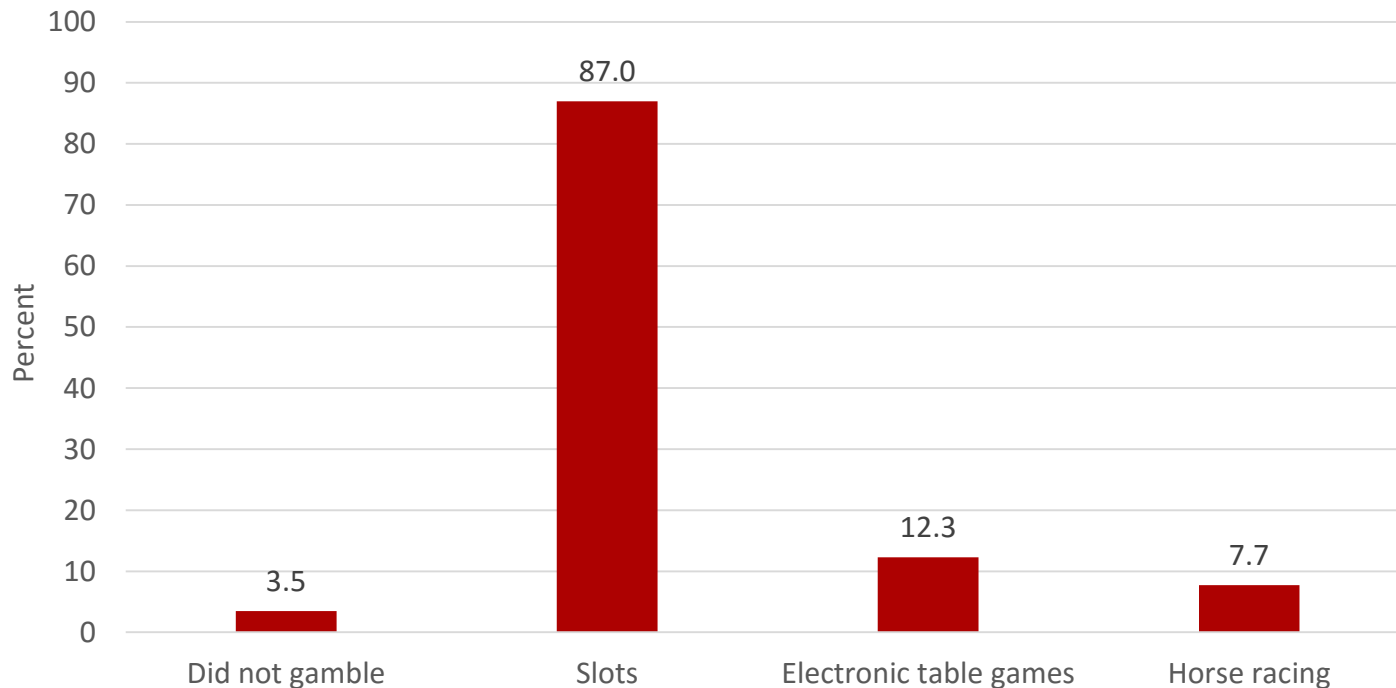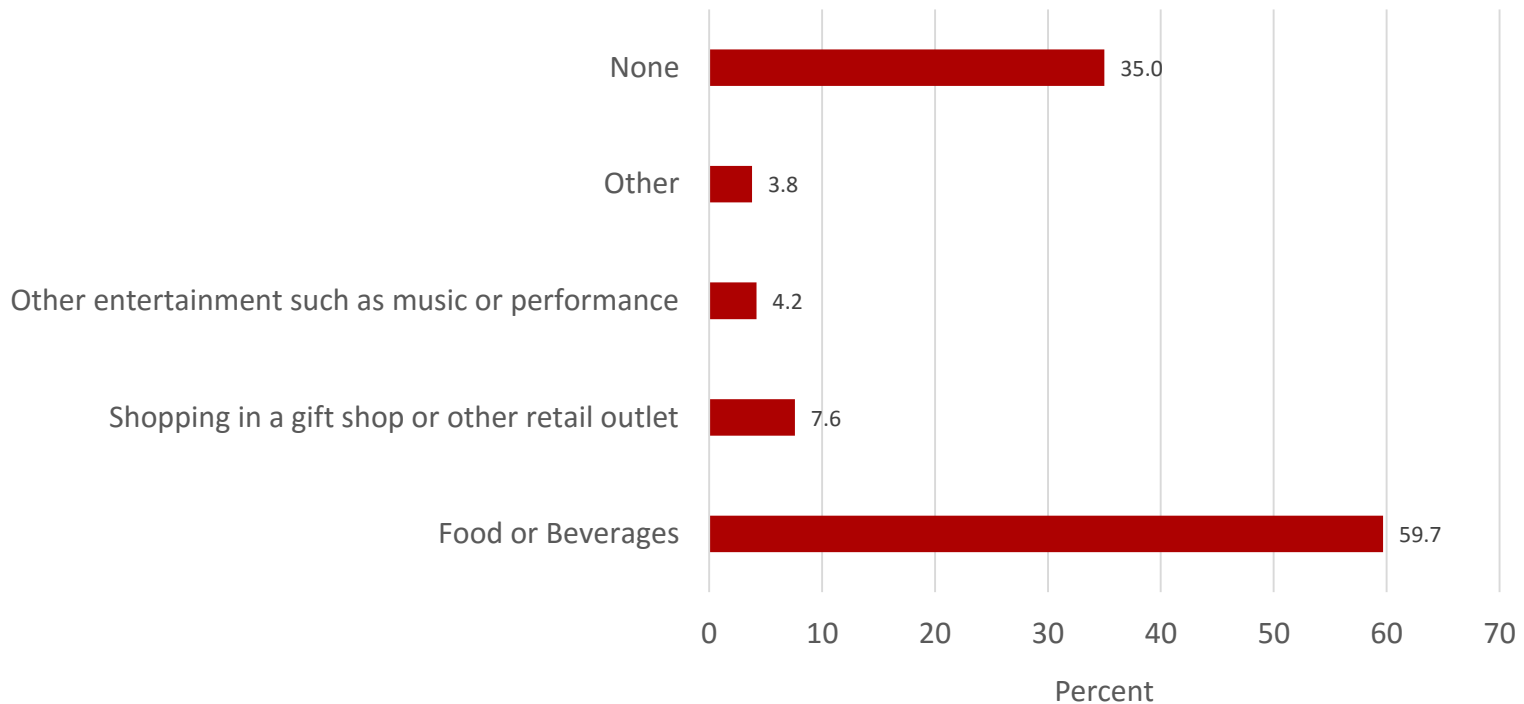
Casinos visited in past year
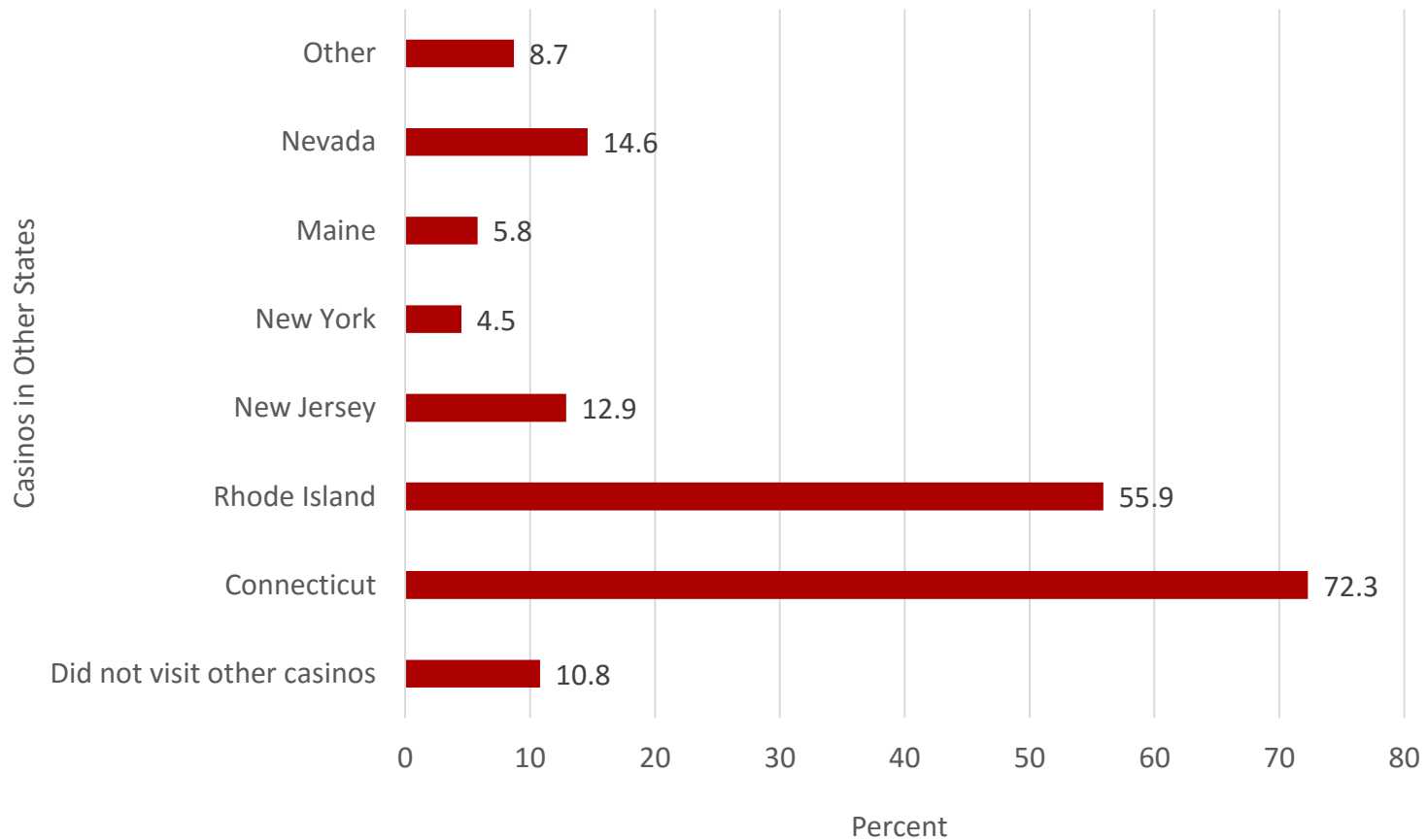
Non-gambling activities at PPC

- While over a third of the patrons did not participate in any non-gambling activities, almost 60% did purchase food or beverage (note that PPC does not "comp" drinks to players)

Non-gambling activities off-site

- The majority of patrons did not participate in any off-site activities during their visit

Expenditures

- The average self-reported expenditures were as follows:

	All patrons	MA patrons
Gambling	$96.39	78.6%
Non-gambling on-site	$63.99	92.1%
Non-gambling off-site	$73.26	78.9%

- Based on revenue figures reported by PPC to MGC we were able to project the total amount of 2016 expenditures for MA vs. non-MA residents
  - Our estimate is that MA residents account for 79.1% of all gambling and non-gambling expenditure and non-MA residents account for 20.9%

Economic modeling

- Patron survey data informed the subsequent economic modeling, which utilizes the PI+ economic impact model produced by Regional Economic Models Incorporated (REMI)

- The most important question: how would patrons have spent their money if PPC never opened?
  - Money that would have been spent out of state is "new" to MA
  - Money that would have been spent in MA comes with a cost to other businesses

- Results of the economic modeling are included in a separate Operations Report (presented 10/12/2017)

How are patron types used

- Allows us to determine what economic activity would not have occurred in the state if PPC had not opened
  - How much money was recaptured from in-state residents who otherwise would have gambled out-of-state?
  - How much of PPC's revenue would have otherwise been spent elsewhere, and where?
 - How much out-of-state spending is new to MA?

Patron Spending at PPC

Source of Spending	Spending (Millions of Dollars)	Share of Spending
Recaptured Spending by In-State Patrons	$100.0	58.0%
Reallocated Spending by In-State Patrons	$36.6	21.2%
Spending by Out-of-State Patrons	$36.0	20.8%
Total	$172.5	100.0%

GameSense

- In partnership with the Cambridge Health Alliance Division on Addictions (who are conducting a more thorough evaluation of GameSense), the Patron Survey included questions concerning patrons' experiences with the GameSense program

- 59.9% of patrons were familiar with the program, though only 17.4% of all patrons had interacted with a GameSense Advisor

  - Of those that did, 98.6% were satisfied with the information offered and 55.3% learned something new
  - 24.7% of patrons who reported having an interaction with a GameSense Advisor changed the way they gambled
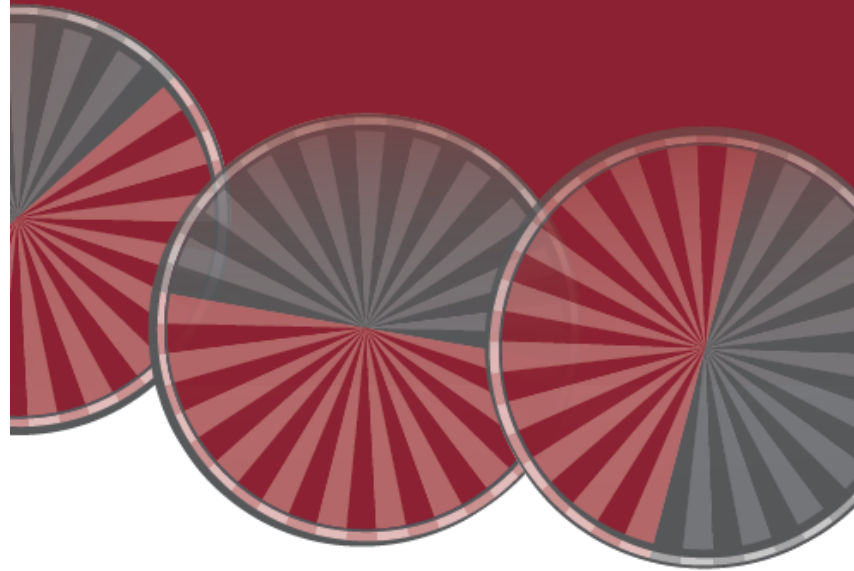
LICENSE PLATE SURVEY

Purposes

- Test how well the results of this much simpler methodology approximates the Patron Survey's more precise and detailed estimates of patron origin and spending
- Test the performance of prior license plate surveys conducted by the Northeastern (formerly New England) Gaming Research Project (NEGPG)
  - Conducted every 2 years from 2004-2014

Survey methods and logistics

- 2-person team conducted license plate counts of all guest parking areas during the same time that we were on-site for the Patron Survey

- Our methodology differed in several ways, for example:

	NEGRP	SEIGMA
Timing	- 1x/yr, mid-Feb - 5 consecutive days, Thur-Mon including President's Day - Surveyed 4x each collection day (9-11am, 2-4pm, 7-9pm, 12am-2am)	- 2x/yr, winter & summer - 4 days each time spread over 2 weeks, peak and non-peak Sat & Mon - Surveyed 1x each collection day (12-4pm or 6-10pm)
Sample Size	1,500 @ large casinos 200 @ small casinos	All license plates

Results

- Weighted geographic origin of all people in the Patron Survey vs. those in the License Plate Survey

	MA	RI	Other	TOTAL
Patron Survey	77.9%	12.0%	10.0%	100.0%
License Plate Survey	82.9%	10.6%	6.6%	100.0%

- Our analysis of estimated % of revenue

	MA residents	Non-MA residents
Patron Survey	79.1%	20.9%
License Plate Survey	82.9%	17.1%

What does this mean?

- The License Plate Survey using the SEIGMA methodology appears to closely approximate the Patron Survey in estimating geographic origin of *overall* patronage and the percentage of revenue from MA vs. non-MA residents
  - But it is not as accurate when we look at the sub-categories of spending, i.e. gambling vs. non-gambling, on-site and off-site
- This was an important exercise to enable us to compare Patron Survey data to other data developed over the years
- The full Patron Survey demonstrates the value of our approach and we will continue to conduct License Plate Surveys concurrent with future Patron Surveys

QUESTIONS?