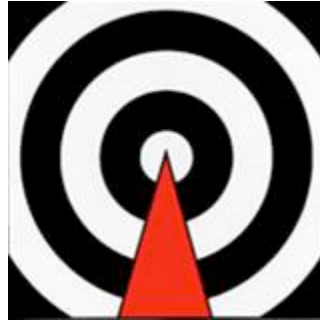


Gonzales Research & Marketing Strategies

www.garesearch.com



Maryland Poll - Part 1

Slots and Gambling University System of MD Tuition Hike

October 2003

Contact: Patrick Gonzales 410-974-4669

Methodology

Patrick E. Gonzales graduated from the University of Baltimore in 1981 with a degree in political science. He is the former president of Mason-Dixon Campaign Polling and Gonzales/Arscott Research & Communications, Inc.

Over the past two decades, Mr. Gonzales has polled and analyzed hundreds of elections in Maryland. Additionally, he and his associates have conducted numerous market research projects and crafted message development programs for businesses and organizations throughout the state.

This survey was conducted by ***Gonzales Research & Marketing Strategies*** from October 20th through October 26th, 2003. A total of 831 registered voters in Maryland who vote regularly were interviewed by telephone. A cross-section of interviews were conducted in each jurisdiction within the state to reflect general election voting patterns.

The margin for error, according to customary statistical standards, is no more than plus or minus 3.5 percentage points. There is a 95 percent probability that the “true” figures would fall within this range if the entire survey universe were sampled. The margin for error is higher for any demographic subgroup, such as gender or party affiliation.

Maryland Statewide Poll Sample Demographics

| Gender | | Race | | Region | |
|---------------------------|-----------|-----------|-----------|--------------------|-----------|
| Male | 414 (50%) | White | 629 (76%) | Eastern Shore/S Md | 104 (13%) |
| Female | 417 (50%) | Black | 187 (23%) | Baltimore City | 81 (10%) |
| | | Other/Ref | 15 | Baltimore Suburbs | 287 (35%) |
| | | | | Washington Suburbs | 265 (32%) |
| | | | | Western Maryland | 94 (11%) |
| Party Registration | | | | | |
| Democrat | 472 (57%) | | | | |
| Republican | 258 (31%) | | | | |
| Independent | 101 (12%) | | | | |

Regional Groupings are as follows:

| Eastern Shore/ Southern Md | Baltimore City | Baltimore Suburbs | Washington Suburbs | Western Maryland |
|-------------------------------|----------------|----------------------|-----------------------|---------------------|
| Calvert Co. | Baltimore City | Anne Arundel Co. | Montgomery Co. | Allegany Co. |
| Caroline Co. | | Baltimore Co. | Prince George's Co. | Carroll Co. |
| Cecil Co. | | Harford Co. | | Frederick Co. |
| Charles Co. | | Howard Co. | | Garrett Co. |
| Dorchester Co. | | | | Washington Co. |
| Kent Co. | | | | |
| Queen Anne's Co. | | | | |
| Somerset Co. | | | | |
| St. Mary's Co. | | | | |
| Talbot Co. | | | | |
| Wicomico Co. | | | | |
| Worcester Co. | | | | |

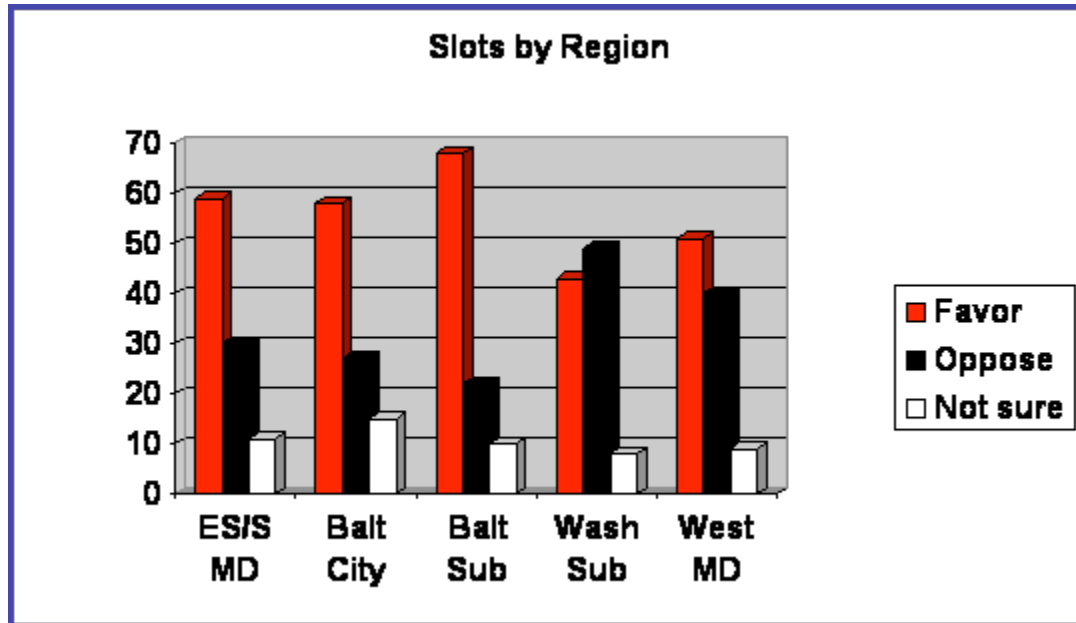
Summary

Slots in Maryland

Statewide, 56% of Marylanders favor legalizing slot machines in the state, while 34% are opposed. These results are similar to our August poll two months ago, with opposition up slightly.

| Slots | Favor | Oppose | No answer |
|---------------------|-------|--------|-----------|
| October 2003 | 56% | 34% | 10% |
| August 2003 | 57% | 31% | 12% |
| March 2003 | 47% | 45% | 8% |
| January 2003 | 46% | 40% | 14% |
| August 2002 | 46% | 37% | 17% |

Majority support for allowing slots in Maryland continues within every demographic subgroup included in our survey, with one notable exception: the Washington suburbs. In this region of the state voter sentiment has shifted back over the past two months to where it's traditionally been, with a plurality in opposition to allowing slot machines.



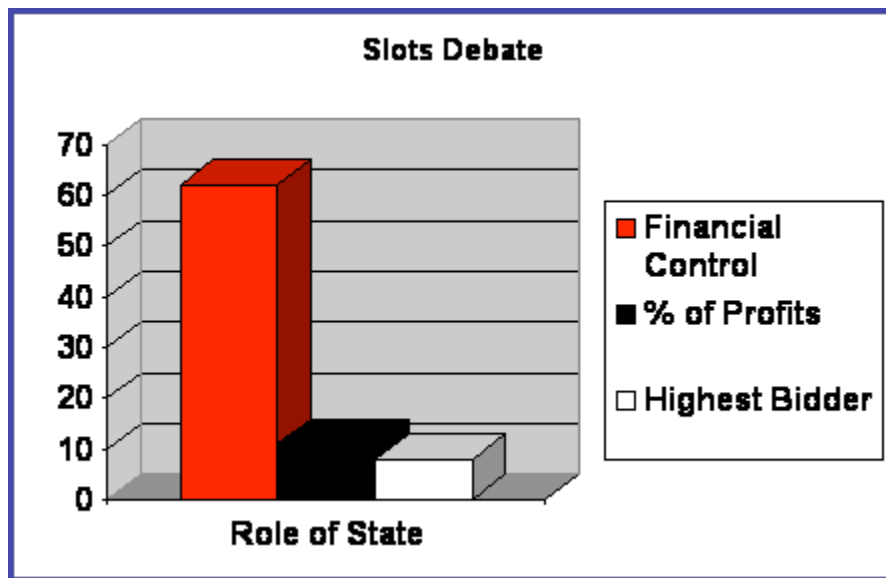
State's Role in Slots Debate

Maryland voters were read the following statement: *"If slot machines were to be legalized in*

Maryland, what role should the state have:

- *The state should retain financial control of any slot machine facilities and hire experts in the field to manage them, or*
- *The state should allow the horse racing industry in Maryland to control any slot machine facilities and give the state a percentage of the profits, or*
- *The state should auction off the right to operate slot machine facilities to the highest bidder?"*

Sixty-two percent say the state should retain financial control of any slot facilities introduced into Maryland, 11% say the state should allow the horse racing industry to control slots facilities and give the state a percentage of the profits, 8% say it should be auctioned to the highest bidder, and 19% offer no opinion.



Slots Exclusively at Racetracks

When asked if slots should be located exclusively at Maryland racetracks, 34% assert that they should, while 48% say they should not, and 14% gave no opinion either way.

Slots at Inner Harbor

Forty percent of Maryland voters favor allowing slot machines in downtown Baltimore near the Inner Harbor, and 47% are opposed to placing slot machines there. Democrats, at 43%, are most likely to support having slot machines at the Inner Harbor. A majority of Republicans and independents oppose the idea.

Casinos

Statewide, a 47% plurality of voters opposes allowing casinos in the Free State, with 41% in favor of casinos, and 12% undecided.

This is a 10-point shift against casinos over the past two months.

| Casinos | Favor | Oppose | Support Ratio |
|---------------------|-------|--------|---------------|
| | | | |
| October 2003 | 41% | 47% | Minus 6% |
| August 2003 | 46% | 42% | Plus 4% |

University System of Maryland Tuition Hike

Voters were asked to respond to the following question: *“As a result of state budget cuts, it has been proposed that tuition at Maryland’s public universities be substantially increased. One proposal calls for a doubling of tuition over the next 5 years. Do you favor or oppose this approach?”*

An overwhelming majority, 83%, opposes doubling tuition at Maryland’s public universities over the next five years. That proportion was almost identical by party affiliation, gender, and race.

QUESTION: *Do you favor or oppose allowing slot machines in Maryland?*

Statewide Results

| Response | Statewide |
|----------|------------|
| | |
| Favor | 56% |
| Oppose | 34% |
| Not Sure | 10% |

Party - Favor or oppose slot machines?

| Party | Favor | Oppose | Not Sure |
|-------------|-------|--------|----------|
| | | | |
| Democrat | 50% | 37% | 13% |
| Republican | 66% | 29% | 5% |
| Independent | 57% | 36% | 7% |

Gender – Favor or oppose slot machines?

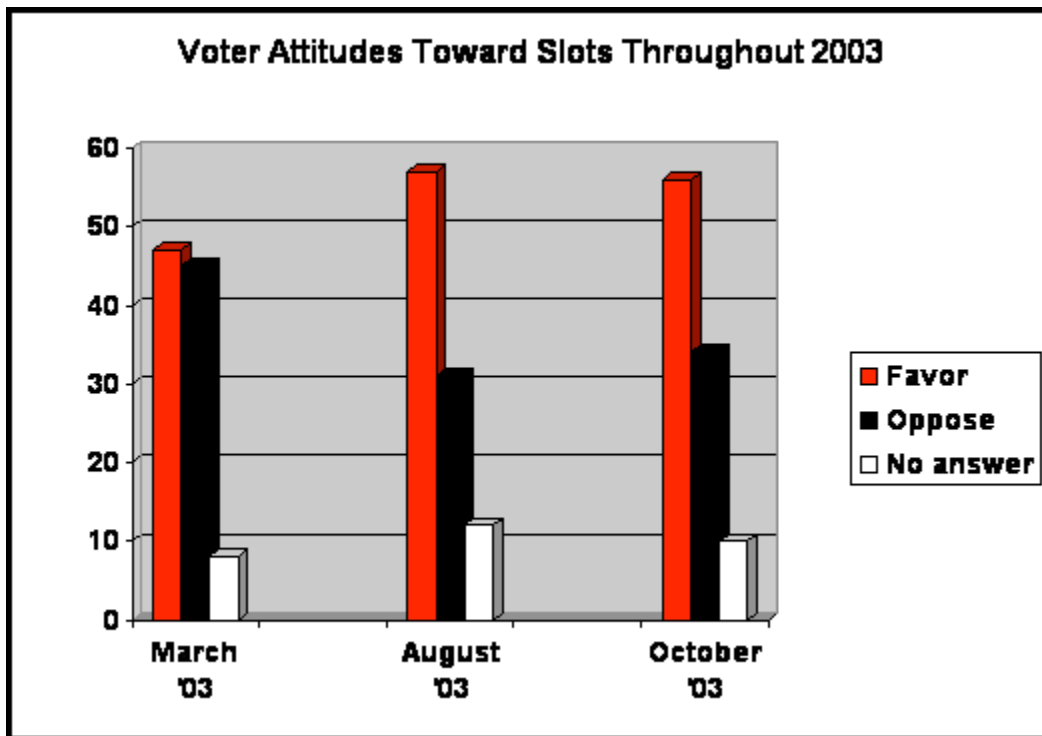
| Gender | Favor | Oppose | Not Sure |
|--------|-------|--------|----------|
| | | | |
| Men | 58% | 31% | 11% |
| Women | 54% | 37% | 9% |

Race – Favor or oppose slot machines?

| Race | Favor | Oppose | Not Sure |
|------------------|-------|--------|----------|
| | | | |
| White | 56% | 33% | 11% |
| African-American | 57% | 37% | 6% |

Region - Favor or oppose slot machines?

| Region | Favor | Oppose | Not Sure |
|-------------------------------|-------|--------|----------|
| Eastern Shore/ Southern MD | 59% | 30% | 11% |
| Baltimore City | 58% | 27% | 15% |
| Baltimore Suburbs | 68% | 22% | 10% |
| Washington Suburbs | 43% | 49% | 8% |
| Western Maryland | 51% | 40% | 9% |



QUESTION: *If slot machines were to be legalized in Maryland, what role should the state have:*
(ORDER ROTATED)

- *The state should retain financial control of any slot machine facilities and hire experts in the field to manage them, or*
- *The state should allow the horse racing industry in Maryland to control any slot machine facilities and give the state a percentage of the profits, or*
- *The state should auction off the right to operate slot machine facilities to the highest bidder?*

Statewide Results

| Response | Statewide |
|-----------------------|------------|
| State Retain Control | 62% |
| Horse Racing Industry | 11% |
| Highest Bidder | 8% |
| Not Sure | 19% |

Party – *What role should state have with slots?*

| Party | State Retain Control | Horse Racing Industry | Highest Bidder | Not Sure |
|-------------|----------------------|-----------------------|----------------|----------|
| Democrat | 64% | 7% | 8% | 21% |
| Republican | 62% | 18% | 7% | 13% |
| Independent | 54% | 11% | 10% | 25% |

Gender – *What role should state have with slots?*

| Gender | State Retain Control | Horse Racing Industry | Highest Bidder | Not Sure |
|--------|----------------------|-----------------------|----------------|----------|
| Men | 56% | 17% | 9% | 18% |
| Women | 68% | 5% | 7% | 20% |

QUESTION: *If slot machines were to be legalized in Maryland, do you think they should be located exclusively at state racetracks, or not?*

Statewide Results

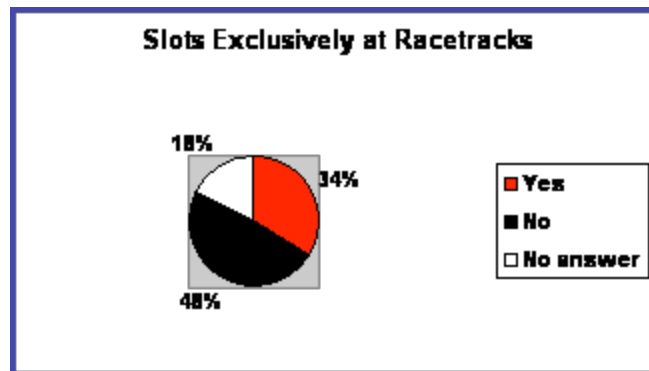
| Response | Statewide |
|-----------|-----------|
| Yes | 34% |
| No | 48% |
| No answer | 18% |

Party - Exclusively at state racetracks, or not?

| Party | Yes | No | No answer |
|-------------|-----|-----|-----------|
| Democrat | 36% | 47% | 17% |
| Republican | 30% | 54% | 16% |
| Independent | 37% | 37% | 26% |

Gender – Exclusively at state racetracks, or not?

| Gender | Yes | No | No answer |
|--------|-----|-----|-----------|
| Men | 33% | 47% | 20% |
| Women | 35% | 49% | 16% |



QUESTION: *If slot machines were to be legalized in Maryland, would you favor or oppose having*

a facility in downtown Baltimore near the Inner Harbor?

Statewide Results

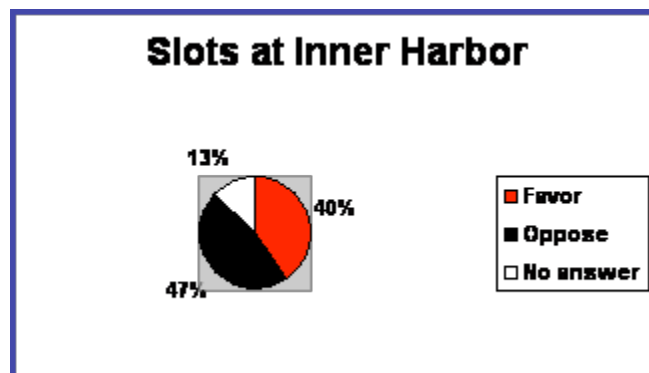
| Response | Statewide |
|----------|-----------|
| Favor | 40% |
| Oppose | 47% |
| Not Sure | 13% |

Party - Favor or oppose facility near Inner Harbor?

| Party | Favor | Oppose | Not Sure |
|-------------|-------|--------|----------|
| Democrat | 43% | 44% | 13% |
| Republican | 38% | 51% | 11% |
| Independent | 31% | 50% | 19% |

Gender – Favor or oppose facility near Inner Harbor?

| Gender | Favor | Oppose | Not Sure |
|--------|-------|--------|----------|
| Men | 37% | 49% | 14% |
| Women | 43% | 45% | 12% |



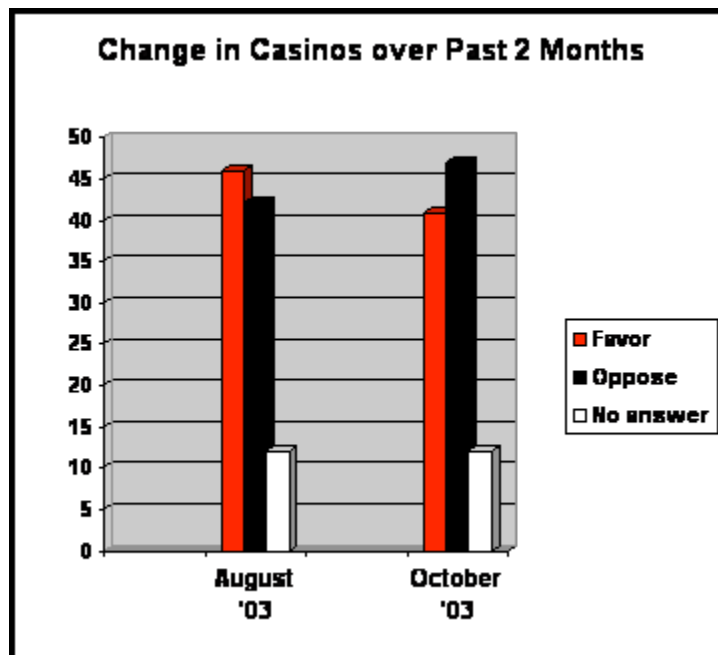
QUESTION: *Do you favor or oppose allowing casinos in Maryland?*

Statewide Results

| Response | Statewide |
|----------|-----------|
| | |
| Favor | 41% |
| Oppose | 47% |
| Not Sure | 12% |

Party - Favor or oppose allowing casinos?

| Party | Favor | Oppose | Not Sure |
|-------------|-------|--------|----------|
| Democrat | 39% | 47% | 14% |
| Republican | 47% | 41% | 12% |
| Independent | 36% | 60% | 4% |



QUESTION: *As a result of state budget cuts, it has been proposed that tuition at Maryland's public universities be substantially increased. One proposal calls for a doubling of tuition over the next 5 years. Do you favor or oppose this approach?*

Statewide Results

| Response | Statewide |
|----------|------------|
| Favor | 11% |
| Oppose | 83% |
| Not Sure | 6% |

Party - Favor or oppose doubling of tuition over the next 5 years?

| Party | Favor | Oppose | Not Sure |
|-------------|-------|--------|----------|
| Democrat | 11% | 82% | 7% |
| Republican | 12% | 84% | 4% |
| Independent | 8% | 86% | 6% |

Gender – Favor or oppose doubling of tuition over the next 5 years?

| Gender | Favor | Oppose | Not Sure |
|--------|-------|--------|----------|
| Men | 11% | 84% | 5% |
| Women | 11% | 82% | 7% |

Race – Favor or oppose doubling of tuition over the next 5 years?

| Race | Favor | Oppose | Not Sure |
|------------------|-------|--------|----------|
| White | 10% | 85% | 5% |
| African-American | 14% | 77% | 9% |