



Hamilton

**Response to the Gaming Facility Proposal
Sub-Committee Related to Casino Locations,
Potential Conditions and Economic Impacts**

February 14 , 2013



Items for Discussion

The information requested by the Subcommittee and contained in the report can generally be categorized into the following themes:

- Locational Criteria;
- Urban Design;
- Operations; and,
- Economic Impacts



Hamilton

Locational Criteria Items

The following items relate to **LOCATIONAL** criteria for Gaming Facilities:

- 1.** Want to see delineation of three different locations - Flamborough, anywhere within the City and Downtown;
- 2.** Want staff to report back on options for recommendations/suggestions as to how a casino proposal would be impacted with regard to zoning or any other issues on these three, or more, locations;
- 3.** If a proponent wishes to build a casino in the downtown area, that the proposal be required to include a hotel and entertainment function, in addition to the casino with gaming tables;
- 4.** Also, that such a condition require that a hotel associated with the casino be incorporated into the first phase of the project; somewhere down the road is not acceptable as a condition;
- 19.** If the casino is located in Hamilton proper and not in Flamborough, concerned about providing parking for the casino.



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Locational Criteria – Item 1

- 1. Want to see delineation of three different locations - Flamborough, anywhere within the City and Downtown.***

Response:

Item 1 has been addressed in Section 3 of the Report and illustrated on the maps in Appendix “A”. Gaming Facilities are generally permitted in the following locations:

- Hamilton Downtown Core;
- West Harbour;
- Accessory to Hotels in the Employment Areas;
- Certain Commercial Zones along major collector roads and at major intersections in Glanbrook and Stoney Creek;
- Specific major City Wide Parks; and,
- Flamboro Downs.



Locational Criteria – Item 2

2. *Want staff to report back on options for recommendations/ suggestions as to how a casino proposal would be impacted with regard to zoning or any other issues on these three, or more, locations.*

Flamborough:

- A hotel is not permitted on the Flamboro Downs
- Due to the large site area and location, parking and potential expansion are not constraints



Locational Criteria – Item 2 (Cont'd)

Downtown:

- The Downtown Zones (D1, D2, and D3) permit GFs, hotels, and other entertainment uses as-of-right, either stand-alone, or collectively
- The Downtown Zones contain regulations respecting design
- Although no parking is required in the Zoning By-law a multi-level parking structure would likely be required
- A downtown location provides synergies with other established major entertainment facilities
- A downtown location provides opportunities for spin off benefits to other services in the downtown
- A downtown location has existing accessibility to higher order transit and major transit corridors



Locational Criteria – Item 2 (Cont'd)

Anywhere Else in City:

- A GF is only permitted in conjunction with a hotel in the 'Employment Areas'. Other constraints for 'Employment Areas' include:
 - Limited opportunities for retail and service uses;
 - Reduced opportunities for synergies with area businesses; and,
 - In some cases, restricted transit and/or pedestrian accessibility.
- Hotels are not permitted in the West Harbour or major City parks
- Those commercial zones along major collector roads and at major intersections in Glanbrook and Stoney Creek are constrained due to:
 - Only certain zones permit a GF, hotel, and entertainment uses;
 - In some cases, transit, vehicular, and/or pedestrian accessibility is restricted in these areas;
 - Maximum building heights and maximum gross floor area restrictions may be an impediment;
 - Availability of large parcels of land;
 - Given potential land constraints, a multi-level parking structure would likely be required; and,
 - Greater opportunity for traffic, parking, and noise impacts to surrounding neighbourhoods, since these areas tend to be surrounded by low density residential areas with a lack of accessibility to higher order transit and major transit corridors.



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Locational Criteria – Item 2 (Cont'd)

Potential Conditions:

- Based on the foregoing, the Downtown area would provide the most flexibility in terms of land use regulations. However, if a hotel is a requisite component, then the City would have to request the OLG to include this as a condition.



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Locational Criteria – Item 3

- 3. If a proponent wishes to build a casino in the Downtown area, that the proposal be required to include a hotel and entertainment function, in addition to the casino with gaming tables.*

Response:

- In order to require a GF to include a hotel and entertainment facility if located in the Downtown area, the proposal would need to locate in a zone that permits both a hotel and GF. However, the zoning does not require GFs to be in conjunction with a hotel.

Potential Condition:

- The City could request the OLG to include a condition to the license that requires the GF be part of an integrated hotel, commercial and entertainment complex



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Locational Criteria – Item 4

4. Also, that such a condition require that a hotel associated with the casino be incorporated into the first phase of the project; somewhere down the road is not acceptable as a condition.

Response:

- The City does not have the authority to require a hotel to be constructed during the first stages of construction of a GF unless it is captured in the applicable Zoning By-law

Potential Condition:

- The city could request the OLG to include a condition requiring the GF to include a hotel in the first phase of the project, or the City could request the OLG to restrict the location to an “M” Zone where the land use regulations require the GF in conjunction with a hotel

Locational Criteria – Item 19

19. *If the casino is located in Hamilton proper and not in Flamborough, concerned about providing parking for the casino.*

Response:

- The following table outlines the parking requirements for GFs and hotels in the Downtown

Community/Area	Zone	Required Parking for GF	Required Parking for Hotel
Downtown Hamilton (By-law No. 05-200)	D1, D2, and D3	None	0.6 spaces per guest room



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Locational Criteria – Item 19 (Cont'd)

- Notwithstanding the municipal parking requirements, Ontario GFs generally provide parking at a rate of 1 space per slot machine. This industry standard would equate to approximately 1,200 parking spaces for the proposed OLG range of up to 1,200 slot machines
- To put this in perspective, the York Boulevard Parkade provides 800 parking spaces over seven storeys on 0.5 ha (1.2 acres). In order to provide 1,200 parking spaces the parkade would need to be almost 1.5 times the size of the York Boulevard Parkade (+/- 10.5 storeys)

Potential Condition:

- The City could request OLG to impose a condition that requires a minimum parking requirement over and above the zoning requirements



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Urban Design Items

The following items relate to URBAN DESIGN for Gaming Facilities:

- 5.** Essential that the residential component respecting redevelopment needs to be integrated; back cannot be turned to the street, but facing; cannot be self-sustaining, such as Jackson Square
- 6.** Require articulation in the site plan in terms of construction of building
- 7.** Make the casino the least visible component of the development and have everything else up front
- 10.** Outward type model vs. indoor type model; no more than 25% of facility should be casino in a larger facility such as a hotel
- 17.** Look at public space as a component of this as a public transit hub; include in RFP process to be located in parameter
- 22.** Given size of casino structures, require LEED Certification on any new facility that is built; will have significant impact on the community



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Urban Design – Items 5, 6, & 7

5. *Essential that the residential component respecting redevelopment needs to be integrated; back cannot be turned to the street, but facing; cannot be self-sustaining, such as Jackson Square.*
6. *Require articulation in the site plan in terms of construction of building.*
7. *Make the casino the least visible component of the development and have everything else up front.*

Response:

- The City's policies and guidelines provide guidance related to the urban design of new developments requiring proper integration within the surrounding neighbourhood, high quality architectural design, and appropriate siting of uses
- The Downtown Zones contain design regulations which will ensure that the building is located close to and faces the street
- A summary of the Urban Design principles applicable to a new Gaming Facility is provided in Appendix "E" of the report

Potential Condition:

- The City could request the OLG to include the Urban Design principles, set out in Appendix "E", as a condition



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Urban Design – Item 10

10. *Outward type model vs. indoor type model; no more than 25% of facility should be casino in a larger facility such as a hotel.*

Response:

- City's land use and Urban Design policies direct major entertainment uses (including GFs) to locate in nodes where other supporting uses exist, and to provide proper design responses to the surrounding context and character
- Each area's surrounding uses and context will determine the range of uses provided within the GF proposal, as well as functional outward or indoor design response

Potential Condition:

- The City could request the OLG to include a condition that requires the GF to provide a minimum amount of other entertainment uses and/or a hotel. Also, the City could request the OLG to include the Urban Design principles set out in Appendix "E" as a condition



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Urban Design – Item 17

17. *Look at public space as a component of this as a public transit hub; include in RFP process to be located in parameter.*

Response:

- A Gaming Facility will require a high standard of design including the surrounding public realm
- The Gaming Facility should contribute to other civic enhancements within the streetscape such as public art, and better quality streetscaping components such as lighting, furniture, wayfinding, signage, etc.

Potential Condition:

- The City could request OLG to impose a condition that requires the GF to be located within 400m (generally a five minute walk) of a planned transit hub or, depending on the location, require the GF to integrate a transit hub within the GF development



Urban Design – Item 22

22. *Given size of casino structures, require LEED Certification on any new facility that is built; will have significant impact on the community.*

Response:

- Many Gaming Facilities in North America have achieved LEED certification
- While LEED Certification should be encouraged, there is a significant cost associated with the construction of a LEED facility, which some GF operators may find cost prohibitive
- Also, the City's *Hamilton's LEEDing the Way Community Improvement Plan* provides financial incentives for LEED certified projects

Potential Condition:

- The City could request OLG to impose a condition that requires the GF proposal to meet, at minimum, the LEED Silver Certification



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Operational Criteria

- 8.** Do not want to see entertainment taken away from the HECFI scenario; use existing facilities and tied to HECFI facilities vs. their own entertainment within the facility
- 9.** Cannot change how the OLG established profit sharing, but can establish in the RFP that the City will seek out more percentage over and above OLG
- 11.** Tied to HECFI facilities vs. their own entertainment facility
- 12.** Reciprocal co-production shows with HECFI facilities tied into casino operation
- 13.** Currently no revenue sharing on the gaming table side of the casino, only slots; do not want to lose sight of that and was to be part of the process
- 14.** Something creative to ensure synergy between operation of the facility and surrounding area pertaining to restaurant facility
- 15.** Want to see percentage of gaming tables go toward mental health issues; how the municipality will have to deal with the significant social issues
- 16.** What is the opinion of the restaurant industry with regard to a casino; not sure how to regulate number of seats, etc.
- 18.** Have staff investigate possibility of time restrictions on the casino, i.e. opening and closing time – hours of operation; look at By-law to restrict serving of alcohol at gaming tables and slots
- 20.** Casino should be responsible to provide 24/7 first response on casino property; want to ensure that with thousands of people on the premises on an on-going basis, that there is quick response
- 21.** Capital funds for a centre of excellence for Substance and Gambling Addiction in Hamilton
- 23.** Suggest direction to City Manager to meet with City Managers of other possible host communities and ascertain exactly what each of those municipalities are wanting as a standard for a fee and come to an agreement together

Operational Criteria – Item 8

- 8. Do not want to see entertainment taken away from the HECFI scenario; use existing facilities and tied to HECFI facilities vs. their own entertainment within the facility.**

Response / Potential Condition:

- The City could request a condition where the City must approve any entertainment aspect of a new GF development. Limitations could be placed on the type of entertainment offered or the size of the potential venue as to not compete with existing HECFI venues.

Operational Criteria – Item 9

9. Cannot change how the OLG established profit sharing, but can establish in the RFP that the City will seek out more percentage over and above OLG.

Response / Potential Condition:

- The City could request a condition that an additional percentage (or lump sum) be payable to the City; however, this would need to be agreed to and absorbed by the potential GF operator. Given that this percentage would cut into a potential GF operator's revenue, there is a strong possibility that the operator could decide to by-pass the City's gaming zone in favour of another zone/another city that did not impose that particular condition.

11. Tied to HECFI facilities vs. their own entertainment facility.

Response / Potential Condition:

- The City could request a condition that any entertainment aspect of a GF development be complementary, non-competitive to HECFI facilities, thereby reducing the chance of cannibalization.

12. Reciprocal co-production shows with HECFI facilities tied into casino operation.

Response / Potential Condition:

- The City could request a condition that any entertainment aspect of a GF development be complementary, non-competitive to HECFI facilities, thereby reducing the chance of cannibalization.

Operational Criteria – Item 13

13. Currently no revenue sharing on the gaming table side of the casino, only slots; do not want to lose sight of that and was to be part of the process.

Response:

- Staff has had further discussions with OLG representatives, who have indicated that municipalities will receive revenues **only** from the slot operations, as per the Provincial Standardized Municipal Contribution Agreement.
- The City could request the OLG to provide revenues from gaming tables.

Operational Criteria – Item 14

14. *Something creative to ensure synergy between operation of the facility and surrounding area pertaining to restaurant facility.*

Potential Condition:

- The City could request the OLG to impose a condition that the operator will be required to partner with local restaurants and hospitality partners through comp or rewards programs.



Operational Criteria – Item 15

- 15. *Want to see percentage of gaming tables go toward mental health issues; how the municipality will have to deal with the significant social issues.***

Staff has had further discussions with OLG representatives who have indicated that municipalities will receive revenues only from the slot operations, as per the Provincial Standardized Municipal Contribution Agreement. If the City was to impose a condition that a percentage of the gaming tables was to go toward mental health issues, this cost would need to be absorbed by the GF operator. Given that this percentage would cut into a potential GF operator's revenue, there is a strong possibility that the operator could by-pass the City's gaming zone in favour of another zone/another city that did not impose that particular condition.

Potential Condition:

- The City could request the OLG to impose a condition that a percentage of the revenue from the gaming tables go toward local mental health issues programs and services.



Operational Criteria – Item 16

16. What is the opinion of the restaurant industry with regard to a casino; not sure how to regulate number of seats, etc.

Response:

- Staff has met with the President of the Ontario Restaurant Motel and Hotel Association (ORMHA).
- *“In theory, unless an existing area is limited in hospitality presence, it stands to reason that it is in our industry’s best interest to be against a stand-alone casino, but rather support an integrated casino development concept that will yield the greatest potential for attracting incremental business into the destination.”*
- In addition, staff’s research of other jurisdictions has found greater benefits to local restaurants when the GF operator made the effort to be integrated with the existing hospitality industry. The benefits were especially true for those establishments that partner with the GF for participation in their comp or rewards program.

Potential Condition:

- The City could request OLG to impose a condition that the operator will be required to partner with local restaurants and hospitality partners through comp or rewards programs.



Operational Criteria – Item 18

18. Have staff investigate possibility of time restrictions on the casino, i.e. opening and closing time – hours of operation; look at By-law to restrict serving of alcohol at gaming tables and slots.

Response:

- Licensing staff has advised that since the OLG is granting the licence for the GF, the City could not control the hours of operation through licensing. Regarding the serving of alcohol, the City is a major commenting body for all liquor license applications within the City, and can request that certain conditions, including restriction of alcohol at gaming tables and slots, be applied to the GF's liquor licence. In order to apply time or alcohol restrictions, the City would need to request the OLG to include these as conditions, as well as request the alcohol restrictions be applied to the liquor licence.

Potential Condition:

- The City could request OLG to impose conditions restricting hours of operation and where alcohol can be served.



Operational Criteria – Item 20

20. Casino should be responsible to provide 24/7 first response on casino property; want to ensure that with thousands of people on the premises on an on-going basis, that there is quick response.

Response:

- All OLG casinos, including the current facility at Flamboro Downs, provide 24/7 first response on their property. Specific security personnel have advanced training in CPR, and can respond immediately to emergencies on-site until municipal emergency services arrive.

Potential Condition:

- The City could request OLG to impose a condition that requires the GF to provide 24/7 first response on their property.

Operational Criteria – Item 21

21. Capital funds for a centre of excellence for Substance and Gambling Addiction in Hamilton.

Response:

- The City of Hamilton could make this request; however, these funds would need to be absorbed by the potential GF operator, as OLG has clearly indicated the only revenues to be received by the municipality would be from the slot operations. Given that this cost would cut into the operator's revenue, there is a strong possibility that the operator could by-pass the City's gaming zone in favour of another zone/another city that did not impose such a condition.

Potential Condition:

- The City could request OLG to impose a condition that requires the GF to provide funds for a centre of excellence for substance and gambling addiction in.



Operational Criteria – Item 23

23. Suggest direction to City Manager to meet with City Managers of other possible host communities and ascertain exactly what each of those municipalities are wanting as a standard for a fee and come to an agreement together.

Responses were received from seven jurisdictions. The consensus among most was that while there is a desire to explore such a move, most municipalities have very distinct agreements, and each municipality is in a slightly different position.

There was a strong indication by both Windsor and Niagara Falls that if there was any opportunity to collectively re-examine the existing agreements, they would be interested in pursuing such.

In summary, while the notion of renegotiation was of interest to those who responded, there was recognition that any formal position would require approval by their respective City Councils.

Potential Condition:

- The City could request OLG to impose a condition, which is consistent with other potential host municipalities, requiring the provision of an additional municipal contribution.



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Economic Impacts

- At the December 13 meeting of the Gaming Facility sub-committee, staff was directed to provide a report on the potential economic impacts (pros and cons of casino operations)



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Economic Impacts

1. Various scenarios that demonstrate the potential municipal revenue from a Casino development in addition to the potential impacts on employment
2. Overview of both the positive and negative economic impacts associated with Casinos



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Not a Formal Economic Impact Analysis

- Where would the Casino be located?
- New Build, Expansion/Retrofit of existing facility
- Type of Casino – integrated entertainment complex vs basic gaming establishment with few amenities
- How many gaming tables?
- Toronto Decision? Western GTA location would have a large impact on the size of a Hamilton Casino



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Direct Annualized Impacts

- Municipal Taxes
- Municipal Contribution Agreement with OLG
- Direct Employment



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Current Arrangement with OLG set to expire March 31, 2013

- The City receives \$4,445,000 from OLG slot revenue
- Horse Racing receives \$24,162,000 from OLG slot revenue
- OLG employs 225
- GCGC employs 176
- Race day employment – up to 250
- Tax Revenue - **\$150,000**



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Flamboro Downs Assessment Impact

- Flamboro Downs has been recently re-assessed resulting in a decrease of approximately \$600,000 in annual tax revenue.



Flamboro Downs Assessment Impact

2012 ASSESSMENT TOTAL:	\$22,450,000
2012 PROPERTY TAXES:	\$750,000 approx.
2013 ASSESSMENT TOTAL:	\$4,493,000
2013 PROPERTY TAXES:	\$150,000 approx.



Hamilton

Current Arrangement with OLG set to expire March 31, 2013

- Revenue to Municipality - \$4,595,000
- Total Direct Jobs – 651**

*** Flamboro Downs impacts 3,600 indirect jobs within their catchment area*



New MCA & the termination of the Slots at Racetracks Program

- The City receives **\$4,845,000** from OLG slot revenue – increase of **\$400,000**
- Horse Racing receives **\$0** from OLG slot revenue
- OLG still employs 225 (assuming lease is signed with GCGC)
- Tax Revenue - **\$150,000**



New MCA & the termination of the Slots at Racetracks Program

- Impacts on employment – GCGC has stated that they will require funding from the provincial government in order to keep the horses racing
- At the time of the writing of this report, GCGC had not come to terms with the Horse Racing Transition Panel for funding moving forward



New MCA & the termination of the Slots at Racetracks Program

- Potential employment loss if agreement not signed or another source of funding is found
- GCGC – 176 direct racing jobs, 250 race day jobs, 3600 indirect jobs



New MCA & the termination of the Slots at Racetracks Program

- Revenue to Municipality - \$4,995,000
- Total Direct Jobs – 225
- Total Direct Jobs lost – potential 426**

*** In addition Flamboro Downs impacts 3,600 indirect jobs within their catchment area*



New MCA & the termination of the Slots at Racetracks Program

- The Horse Racing Transition Panel has been entering into agreements with racetracks across the Province of Ontario to supply transition funding
- Financial details and length of these agreements has not been made public at this time as they are still in negotiations with track operators



New MCA & the termination of the Slots at Racetracks Program

- One of the recommendations in the transition report is to drastically reduce the number of race days and potentially the number of racetracks across the province
- Flamboro Downs is in a Standardbred B (Signature) category
- There are six tracks in this category across the province



New MCA & the termination of the Slots at Racetracks Program

- Last year in this category there were 731 race days across the six tracks of which Flamboro Downs had 188 race days
- Moving forward the Transition Panel is recommending 300 total race days in this category across the province; this will have a significant impact on the number of race days at Flamboro Downs and employment in racing operations



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Gaming facility not Re-instated

- This is the worst case scenario
- If there is no more horse racing, the gaming facility is not re-instated and the Casino locates outside of the gaming zone

Gaming Facility not Re-instated

- Revenue to Municipality - \$150,000
- Total Direct Jobs - 0
- Total Direct Jobs lost - potential 671**

*** In addition Flamboro Downs impacts 3,600 indirect jobs within their catchment area*



Impact at a Location Outside of Flamboro Downs

- OLG has stated that a relocated facility in the core of Hamilton has the potential to increase gaming revenues which would lead to increased municipal contributions and activity
- This would include up to 400 additional slot machines and a yet to be determined number of tables games



Impact at a Location Outside of Flamboro Downs

- Revenue Share and Property Tax Estimate – **\$5 – \$ 7 million**
- **400 – 600 jobs** will be created with new gaming facility. This number excludes jobs associated with any potential amenities
- Net new jobs for the Casino would be between **175 – 375** if the current OLG employees were picked up by the new gaming facility



Impact at a Location Outside of Flamboro Downs

- OLG has stated that the potential value of construction of a Casino and related amenities could be in the **\$100 - \$200 million** range and has the potential to increase municipal assessment beyond the **\$5 - 7 million** they have projected
- According to our Finance department, if the Casino Brantford building were located in Hamilton it would generate \$3.4 million in annual commercial taxes



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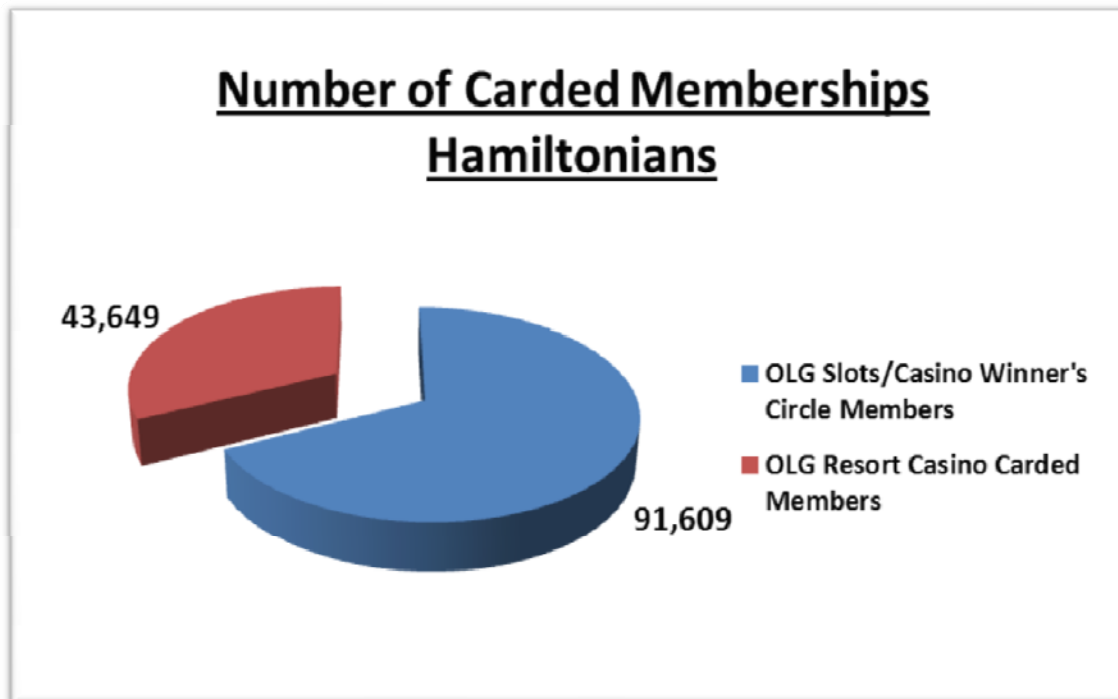
Wage Rates

- The average salary including benefits of an OLG employee is \$50,000
- Average total compensation, including wages and benefits for gaming middle management employees is \$60,000 - \$100,000
- Average total compensation, including wages and benefits for gaming floor staff employees is \$40,000 - \$60,000

Hamilton Carded Play Information

- Hamilton Profile 2011 Memberships

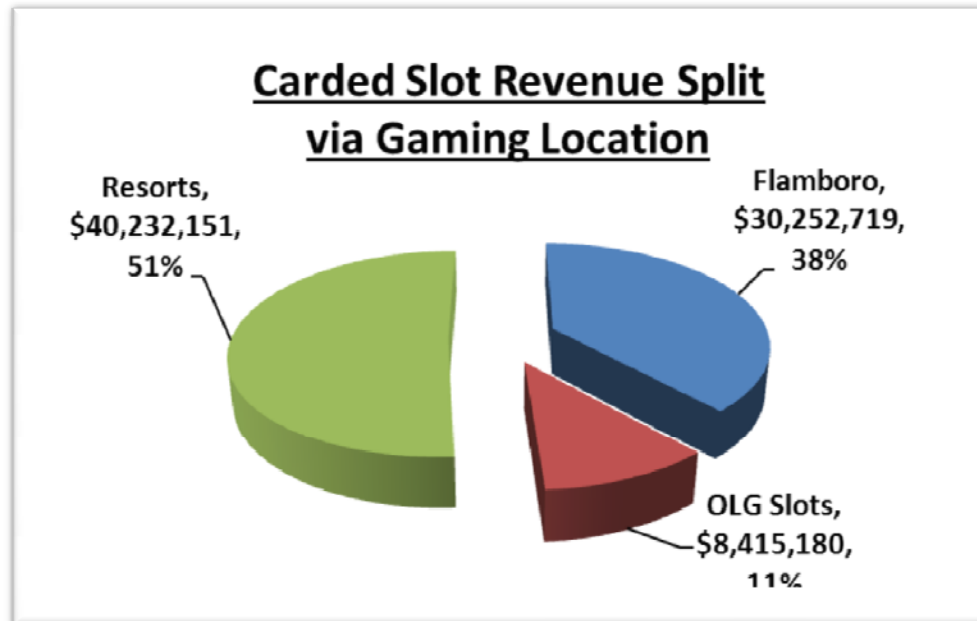
OLG Slots/Casino Winner's Circle Members	91,609
OLG Resort Casino Carded Members	43,649



Hamilton Profile 2011 Spending

- Carded Slot Revenue - Hamiltonians

Site	Amount	%
Flamboro	\$30,252,719	38%
OLG Slots	\$8,415,180	11%
Resorts	\$40,232,151	51%
Total	\$78,900,050	



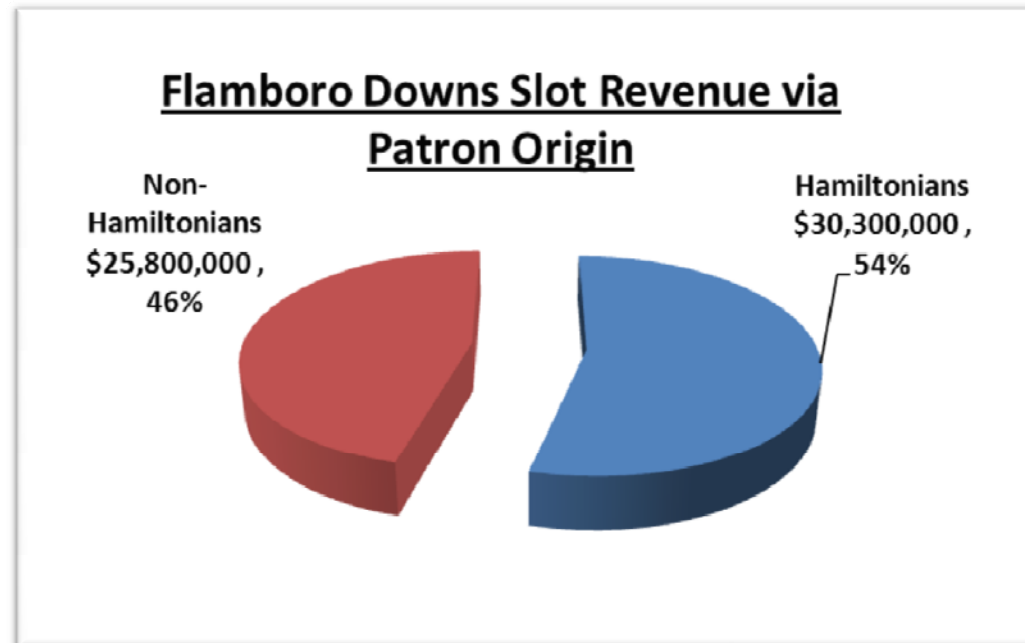


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Flamboro Downs

- **Winner's Circle Members Carded Slot Revenues at Flamboro Downs**

Patron	Carded Slot Revenue	Percentage
Hamiltonians	\$30,300,000	54.0%
Non-Hamiltonians	\$25,800,000	46.0%
Total	\$56,100,000	



Economic Impacts Related to a Casino

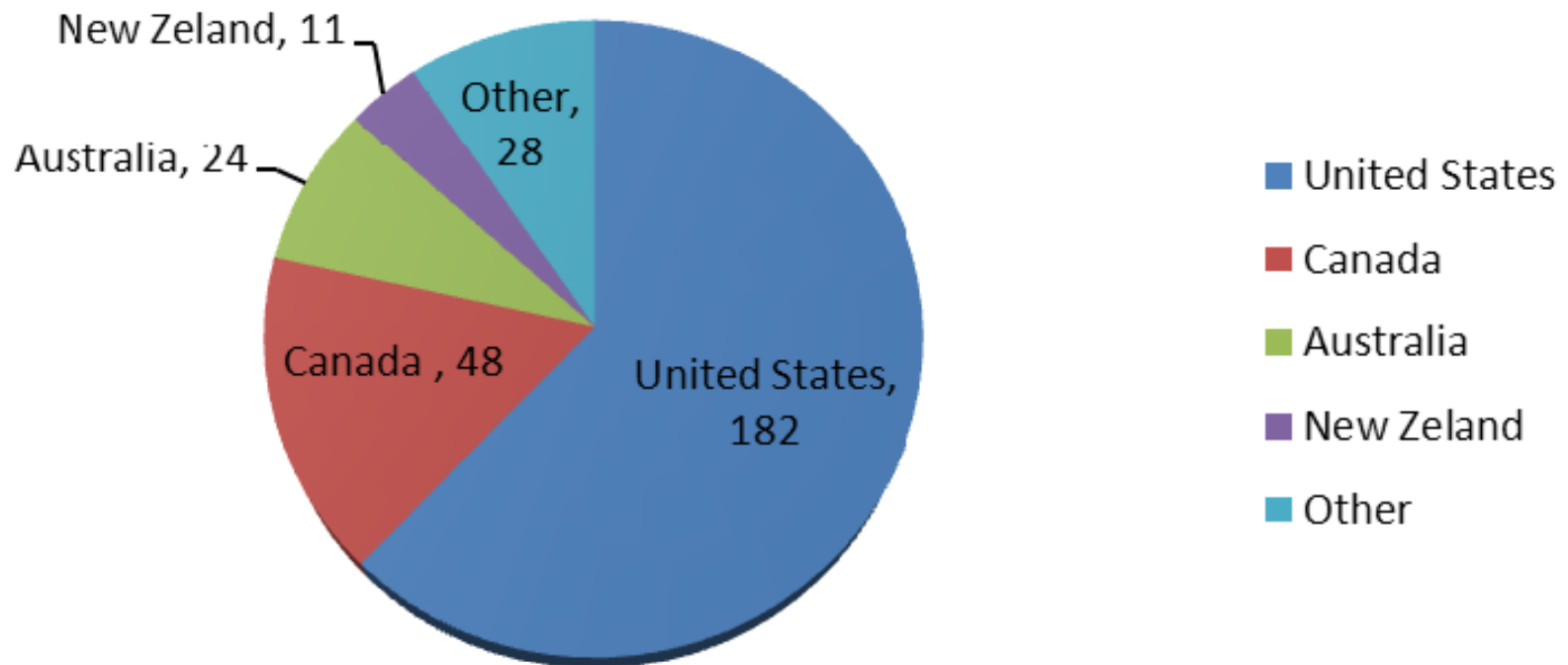
- Staff undertook an extensive literature review
- There are literally hundreds of reports on the impacts of gambling and casinos
- Utilized the Social and Economic Impacts of Gaming: Final Report commissioned by the Canadian Consortium of for Gambling Research

Economic Impacts Related to a Casino

- Report included 492 studies of which 293 were empirical
- After reviewing several reports, staff found that this particular report included the majority of the studies mentioned from the other reports reviewed
- Staff found this report to be the most comprehensive, unbiased, balanced and rigorous of all the reports researched

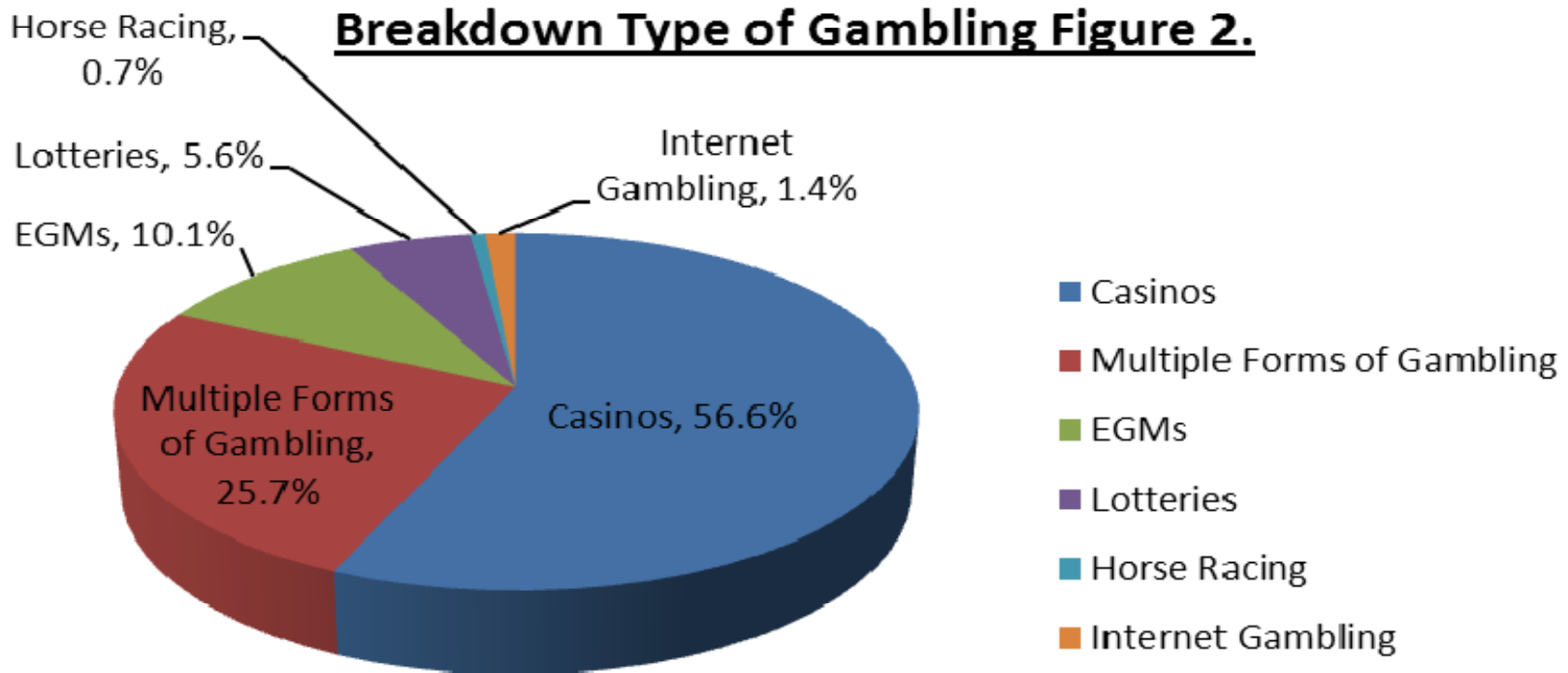
Location of Empirical Socioeconomic Impact Studies of Gambling

Number of Studies Figure 1.



Type of Gambling that has been the Focus of Empirical Socioeconomic Impact Studies

Breakdown Type of Gambling Figure 2.



Main pattern of findings concerning the economic & social impacts of gambling

CASINOS	Increase	Changes (but no net increase or decrease)	No Impact	Decrease
Government Revenue	8, 32, 52, 63, 64, 70, 78, 89, 110, 133 , 147, 149 , 207, 209, 214, 220, 245 , 250, 267, 268, 278, 306, 308, 351 , 364, 376, 389, 403, 408, 409 , 419, 435, 440	24, 200 , 420	45	25, 352
Public Services	8, 22, 32, 52, 64, 78, 94 , 110, 131 , 133 , 245 , 250, 267, 317, 425, 435		205	206
Regulatory Costs	8, 351			
Infrastructure Value	8, 22, 32, 52, 62, 110, 133 , 188, 278, 396, 468			
Infrastructure Costs	8, 32, 52, 110, 206, 220, 245 , 408		45, 149	
Business Starts	32, 133 , 139 , 194, 207	220		
Business Failures	8, 32, 139 , 408	52, 220, 408		166
Business Revenue	22, 32, 64, 71, 83, 97 , 110, 133 , 188, 194, 245 , 250, 308, 389, 396, 419, 425, 440	25, 62, 182, 209, 220, 316	149 , 207, 409 , 457	8, 52, 200 , 357, 382
Personal Income	27, 70, 94 , 161, 188, 233, 282, 419, 431		467, 468	306
Property Values	8, 45, 52, 220, 409 , 480		149 , 344 , 361, 467, 468	161
Problem Gambling & Related Indices	9, 41, 45, 54, 82, 131 , 154, 166, 167 , 215, 216 , 289 , 308, 323, 343, 351 , 369, 396, 407 , 425, 430, 466		54, 55, 77, 103, 168 , 215, 240 , 289 , 316 , 322, 377	
Crime	52, 98 , 102, 131 , 146, 156, 179 , 189, 220, 349, 396, 407 , 410, 419, 431	17, 362	8, 19, 45, 102, 232, 240 , 245 , 288, 316 , 344 , 405 , 487	354
Employment	8, 22, 32, 52, 64, 70, 71, 78, 83, 94 , 97 , 110, 131 , 133 , 138, 139 , 149 , 152 , 153 , 161, 188, 194, 209, 233, 245 , 267, 278, 292, 306, 308, 316 , 324, 364, 396, 419, 431, 440, 467, 468	200	45, 62, 173, 181, 182, 240 , 282, 361, 468	
Socioeconomic Inequality				
Leisure Activity	78, 351	52, 389		
Attitudes	19, 20, 29, 79, 159, 217, 258, 320, 324, 368, 407	224, 255, 257, 268, 269, 311	67, 210, 406	82, 207, 211, 216 , 369, 442
Quality of Life/Public Health/Social Capital/Values	94 , 110, 131 , 271, 303, 324, 431	133 , 138, 336, 376	205, 208, 321, 354, 467	184, 311

Business Starts, Business Failures & Business Revenue

- The introduction of gambling often has beneficial impacts on other businesses in the local area in terms of increased revenue, business starts, and overall employment when a significant portion of the its patron base is from outside the area.



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Business Starts, Business Failures & Business Revenue

- When the patron base is from the local area it is more likely there will be negative impacts on other local businesses



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Property Values

- A new gambling venue may increase the value of adjacent property to investors who may desire to build complementary businesses
- A new gambling venue might also increase noise, traffic and parking difficulties and/or attract undesirable clientele to the neighbourhood



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Infrastructure Value & Costs

- The construction of a new gambling venue adds to the physical assets and wealth of the local community. This is especially true if this new venue is associated with infrastructure upgrades (road, water, sewer) and if the project is being funded by out of town investors.



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Infrastructure Value & Costs

- Service upgrades that are needed (police, fire services, public transportation) do not increase the physical assets of the community and the costs of these enhanced services are commonly borne by government.



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Public Services

- Gambling Revenue usually improves public services provided by government and/or charity community groups
- It is sometimes the case that government gambling revenue is used to avoid raising taxes, reduce government debt or to maintain rather than enhance existing services



Summary

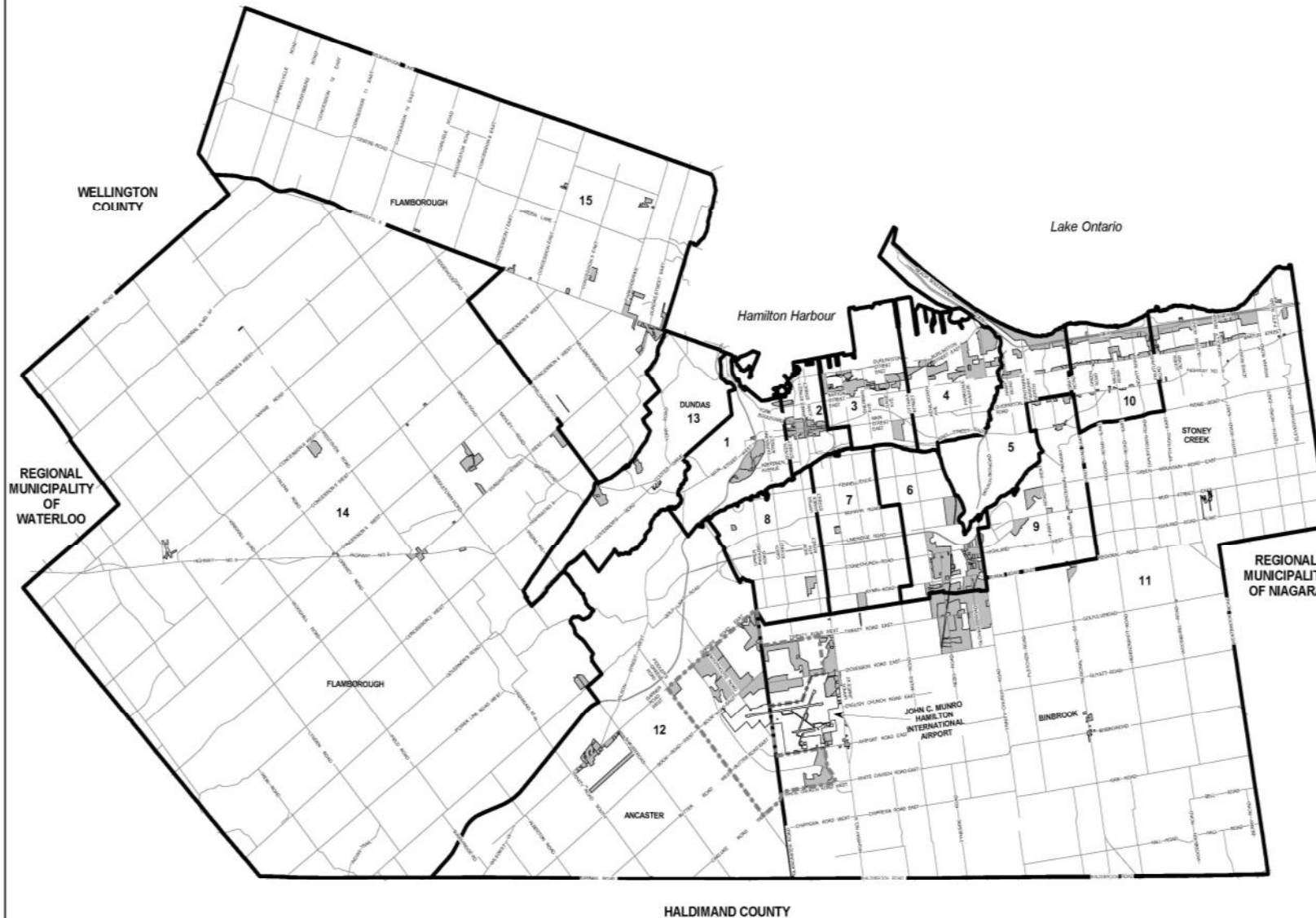
- There is no consensus on whether economic impacts negate the social impacts of a Casino
- There are a large number of variables that need to be considered and evaluated in any analysis
- If detailed information can be identified on a potential local Casino development there are econometric models that are available that can project impacts/benefits.







Hamilton

Thank you

**OVERALL MAP
CITY OF HAMILTON**



LEGEND

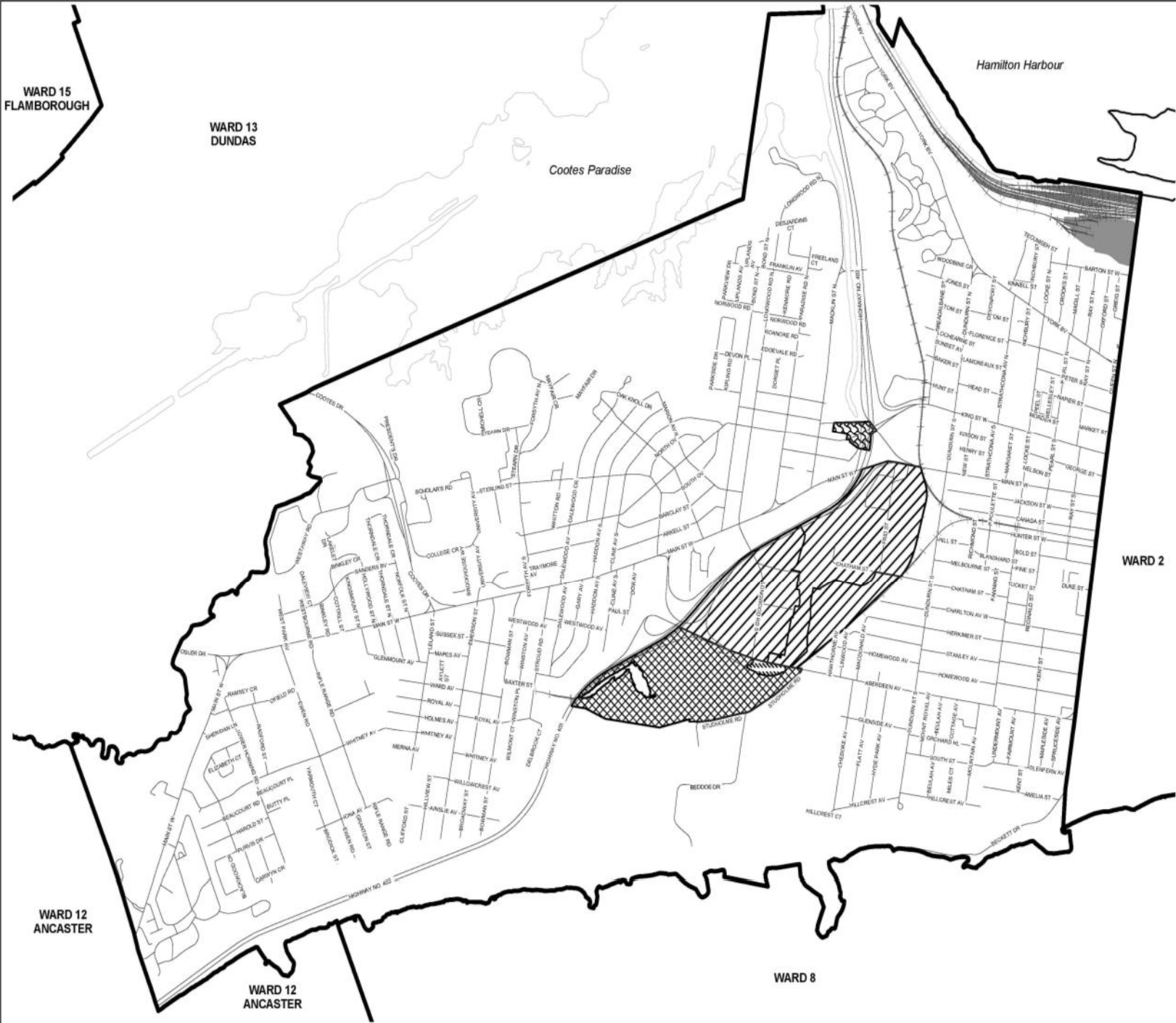
-  Zones which permit Gaming Facilities
-  AEGD Boundary
-  Ward Boundary
-  Major Roads

**Zoning for Gaming Facilities:
Overall City of Hamilton**










Date:
January 28, 2013



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LEGEND

-  D2 (By-Law 05-200)
-  M1 (By-Law 05-200)
-  M3 (By-Law 05-200)
-  M4 (By-Law 05-200)
-  M6 (By-Law 05-200)
-  Ward Boundary
-  Shoreline
-  Roads
-  Railways

Zoning for Gaming Facilities:
Ward 1

Date:
January, 29, 2013







**MAP NO. 1b)
WARDS 1 and 2
WEST HARBOUR**



Hamilton Harbour

LEGEND

-  D2 (By-Law 05-200)
-  D3 (By-Law 05-200)
-  D6 (By-Law 05-200)
-  Ward Boundary
-  Parcels

**Zoning for Gaming Facilities:
Hamilton West Harbour**

Date
January 28, 2013



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**MAP NO. 2
WARD 2 - DOWNTOWN**



LEGEND

- D1 (By-Law 05-200)
- D2 (By-Law 05-200)
- D3 (By-Law 05-200)
- Downtown Hamilton Secondary Plan Boundary
- Ward Boundary
- Parcels
- Railways

**Zoning for Gaming Facilities:
Downtown Hamilton**

Date:
January 28, 2013



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**MAP NO. 3
WARD 3**



WARD 2

WARD 4

LEGEND

-  M6 (By-Law 05-200)
-  P3 (By-Law 05-200)
-  Ward Boundary
-  Shoreline
-  Roads
-  Railways

**Zoning for Gaming Facilities:
Ward 3**

Date:
January 28, 2013



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**MAP NO. 4
WARD 4**






WARD 3

WARD 5

Windermere
Basin

Lake Ontario

LEGEND

-  M6 (By-Law 05-200)
-  Ward Boundary
-  Shoreline
-  Roads
-  Railways

**Zoning for Gaming Facilities:
Ward 4**

Date:
January 28, 2013



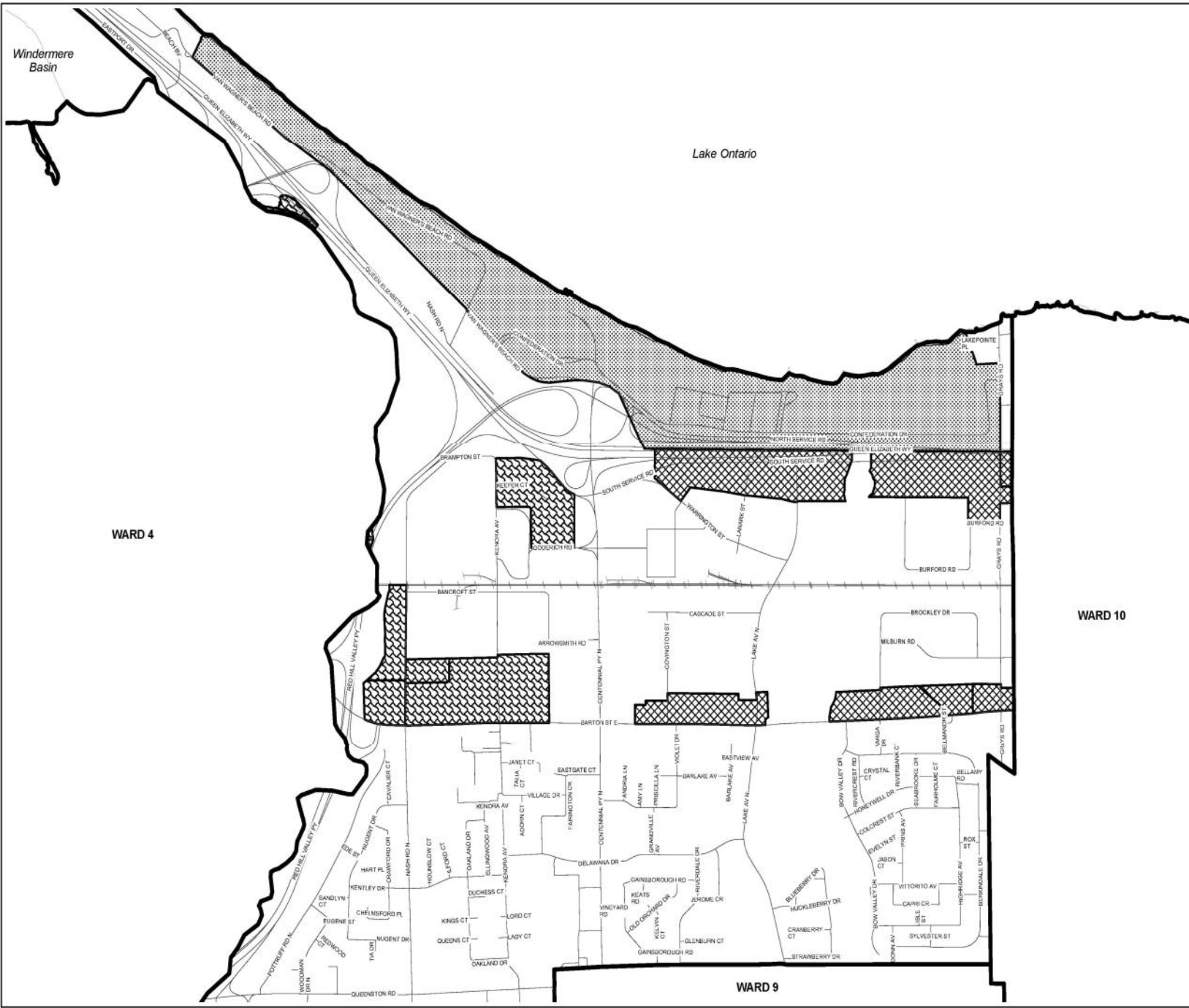
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








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**MAP NO. 5
WARD 5**



- LEGEND**
-  M3 (By-Law 05-200)
 -  M6 (By-Law 05-200)
 -  P3 (By-Law 05-200)
 -  Ward Boundary
 -  Shoreline
 -  Roads
 -  Railways

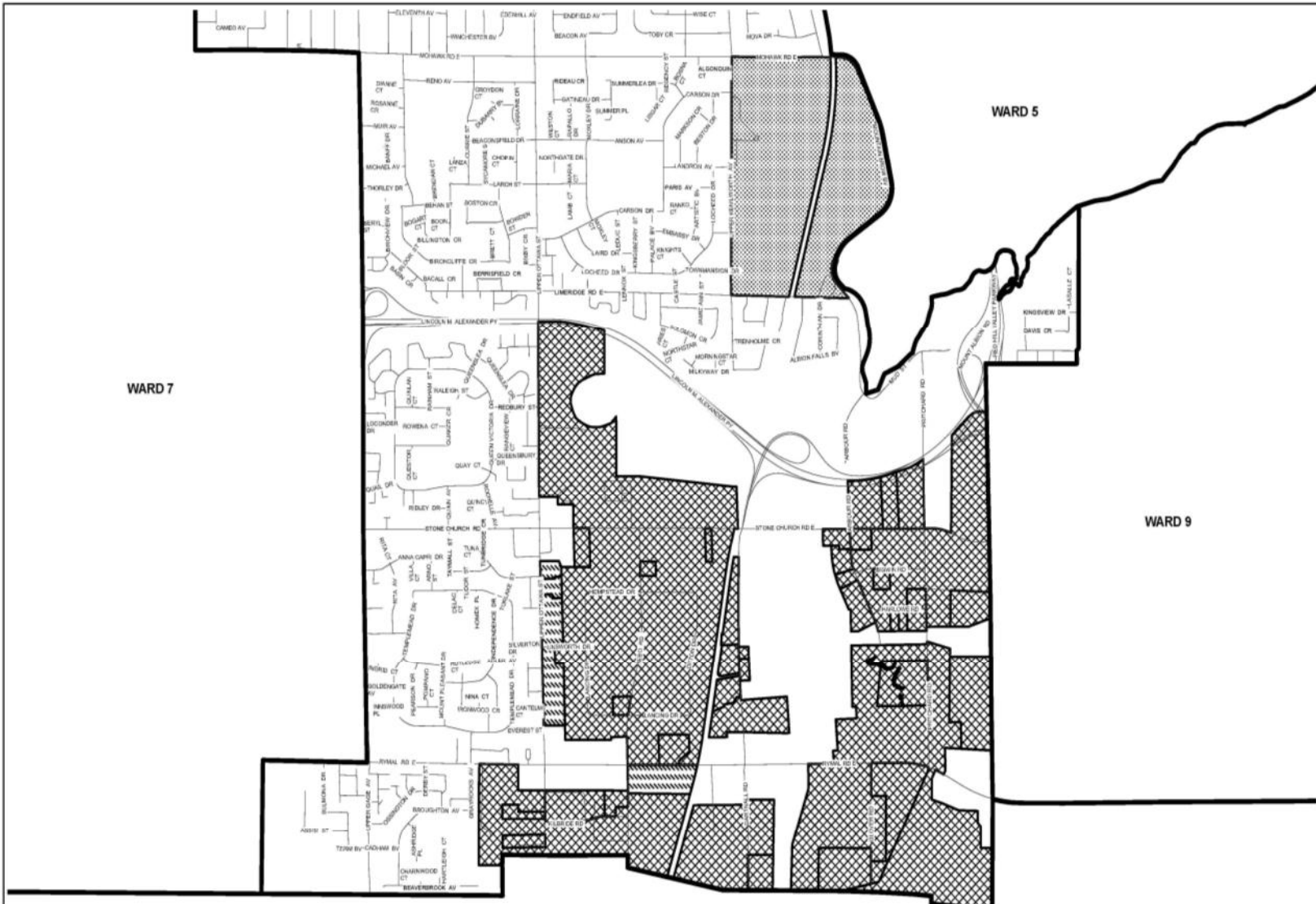
**Zoning for Gaming Facilities:
Ward 5**

Date:
January 28, 2013









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**MAP NO. 6
WARD 6**



LEGEND

-  M3 (By-Law 05-200)
-  M4 (By-Law 05-200)
-  P3 (By-Law 05-200)
-  Ward Boundary
-  Roads
-  Railways

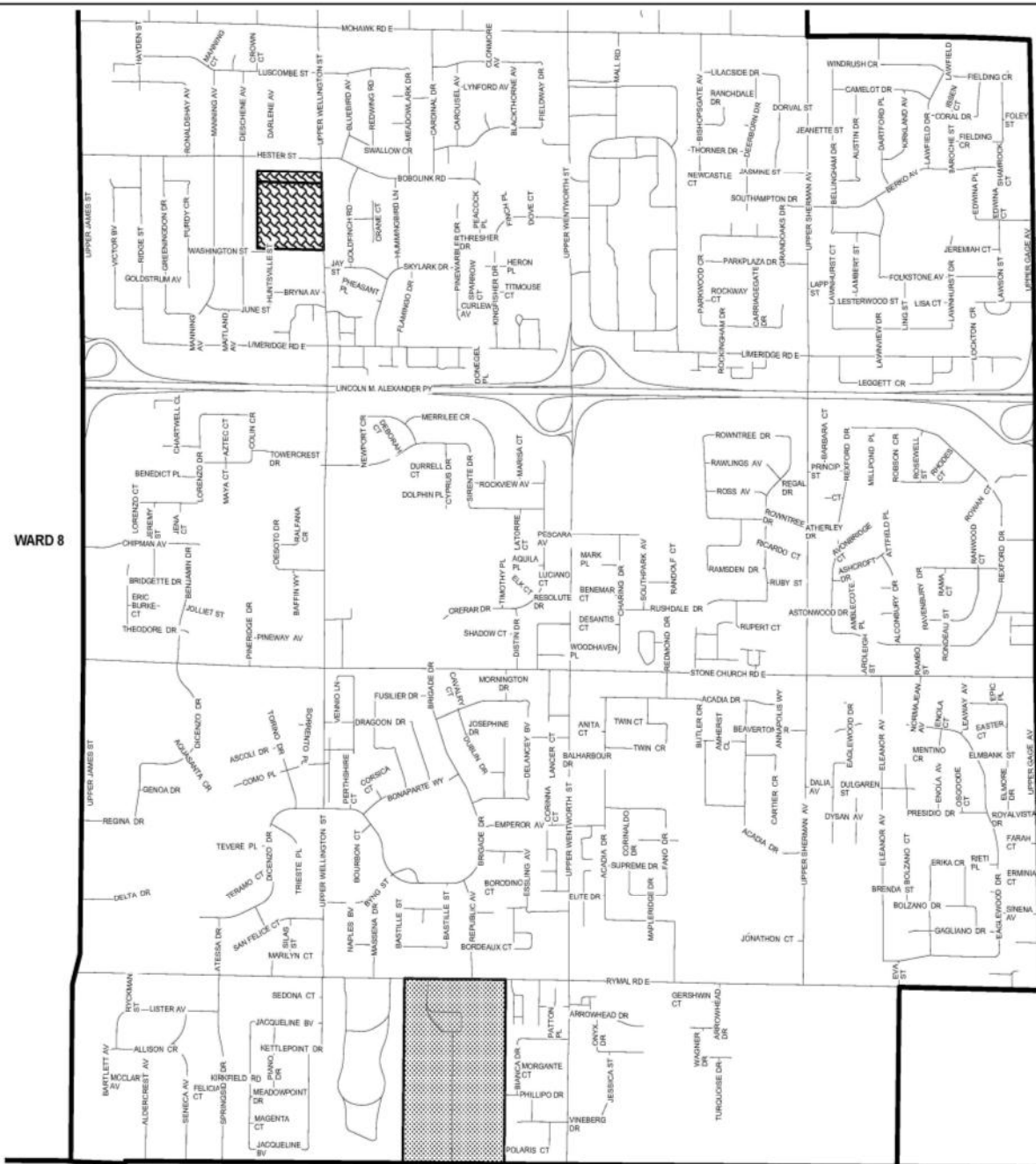
**Zoning for Gaming Facilities:
Ward 6**

Date
January 26, 2013








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MAP NO. 7
WARD 7



LEGEND

-  M6 (By-Law 05-200)
-  P3 (By-Law 05-200)
-  Ward Boundary
-  Roads
-  Railways

Zoning for Gaming Facilities:
Ward 7

Date
January 28, 2013



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**MAP NO. 8
WARD 8**

WARD 7

WARD 12
ANCASTER

LEGEND

-  P3 (By-Law 05-200)
-  Ward Boundary
-  Roads
-  Railways

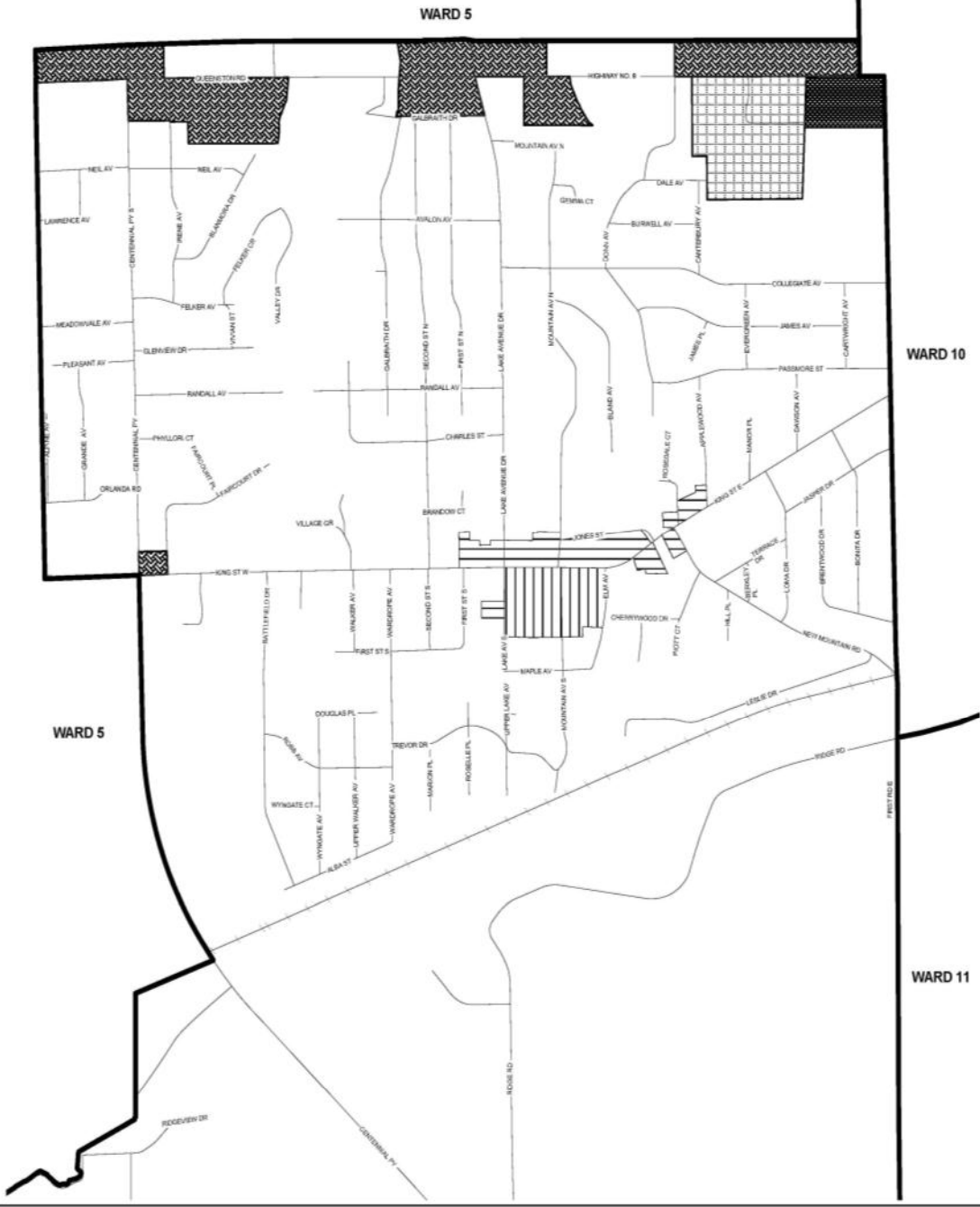
**Zoning for Gaming Facilities:
Ward 8**

Date:
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MAP NO. 9a)
WARD 9



LEGEND

-  CA1 (By-Law 3692-92)
-  CA2 (By-Law 3692-92)
-  GC (By-Law 3692-92)
-  SC1 (By-Law 3692-92)
-  SC2 (By-Law 3692-92)
-  Ward Boundary
-  Roads
-  Railways

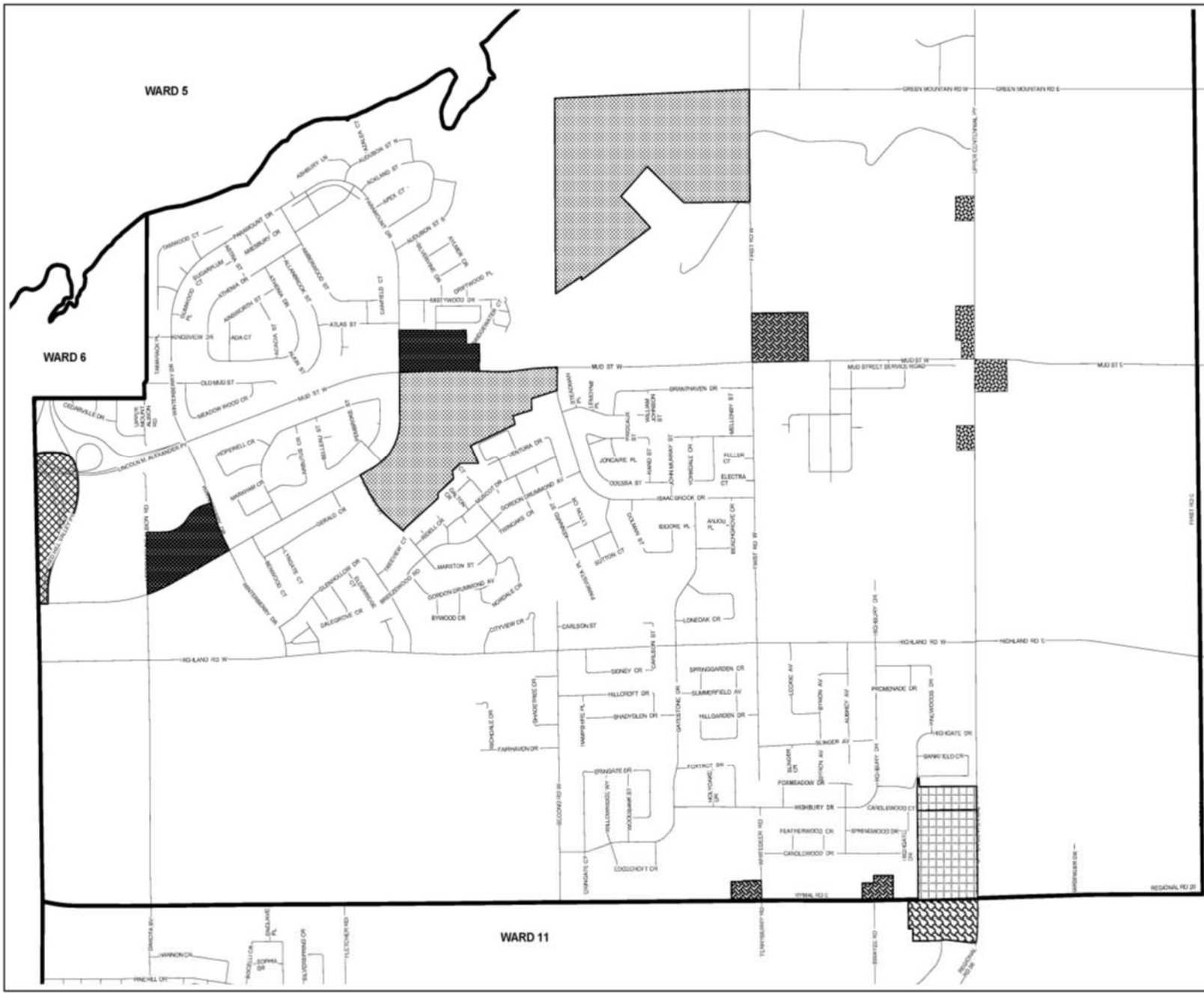
Zoning for Gaming Facilities:
Ward 9 North: Map 1 of 2

Date:
January 28, 2013



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**MAP NO. 9b)
WARD 9**



- LEGEND**
- GC (By-Law 3692-92)
 - HC (By-Law 3692-92)
 - M3 (By-Law 05-200)
 - M6 (By-Law 05-200)
 - P3 (By-Law 05-200)
 - SC1 (By-Law 3692-92)
 - SC2 (By-Law 3692-92)
 - Ward Boundary
 - Roads
 - Railways

**Zoning for Gaming Facilities:
Ward 9 South: Map 2 of 2**








Date:
January 25, 2013



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LEGEND

-  GC (By-Law 3692-92)
-  HC (By-Law 3692-92)
-  M3 (By-Law 05-200)
-  Ward Boundary
-  Shoreline
-  Roads
-  Railways

**Zoning for Gaming Facilities:
Ward 10**

Date:
January 28, 2013











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MAP NO. 11a)
WARD 11



LEGEND

-  GC (By-Law 3692-92)
-  HC (By-Law 3692-92)
-  M3 (By-Law 05-200)
-  M4 (By-Law 05-200)
-  Ward Boundary
-  Shoreline
-  Roads
-  Railways

Zoning for Gaming Facilities:
Ward 11 - Lower Stoney Creek

Date:
January 28, 2013



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WARD
10

**MAP NO. 11b)
WARD 11
BINBROOK**



LEGEND

-  C3 (By-Law 464)
-  Roads

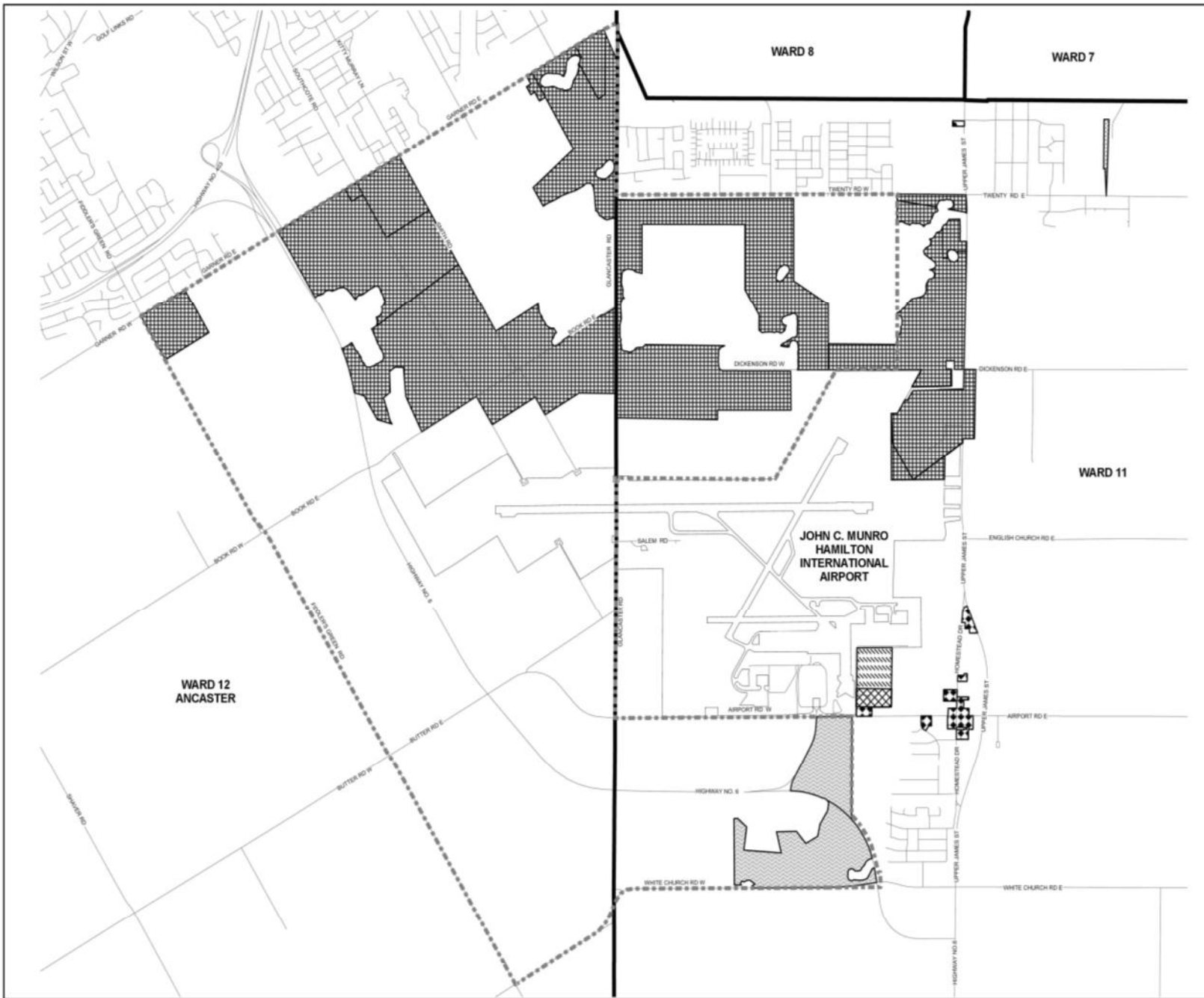
**Zoning for Gaming Facilities:
Ward 11 - Binbrook**

Date:
January 28, 2013










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**MAP NO. 12
WARDS 11 and 12
AEGD**



LEGEND

-  C3 (By-Law 464)
-  M3 (By-Law 05-200)
-  M8 (By-Law 05-200 Under Appeal)
-  M11 (By-Law 05-200 Under Appeal)
-  AEGD Boundary
-  Ward Boundary
-  Roads

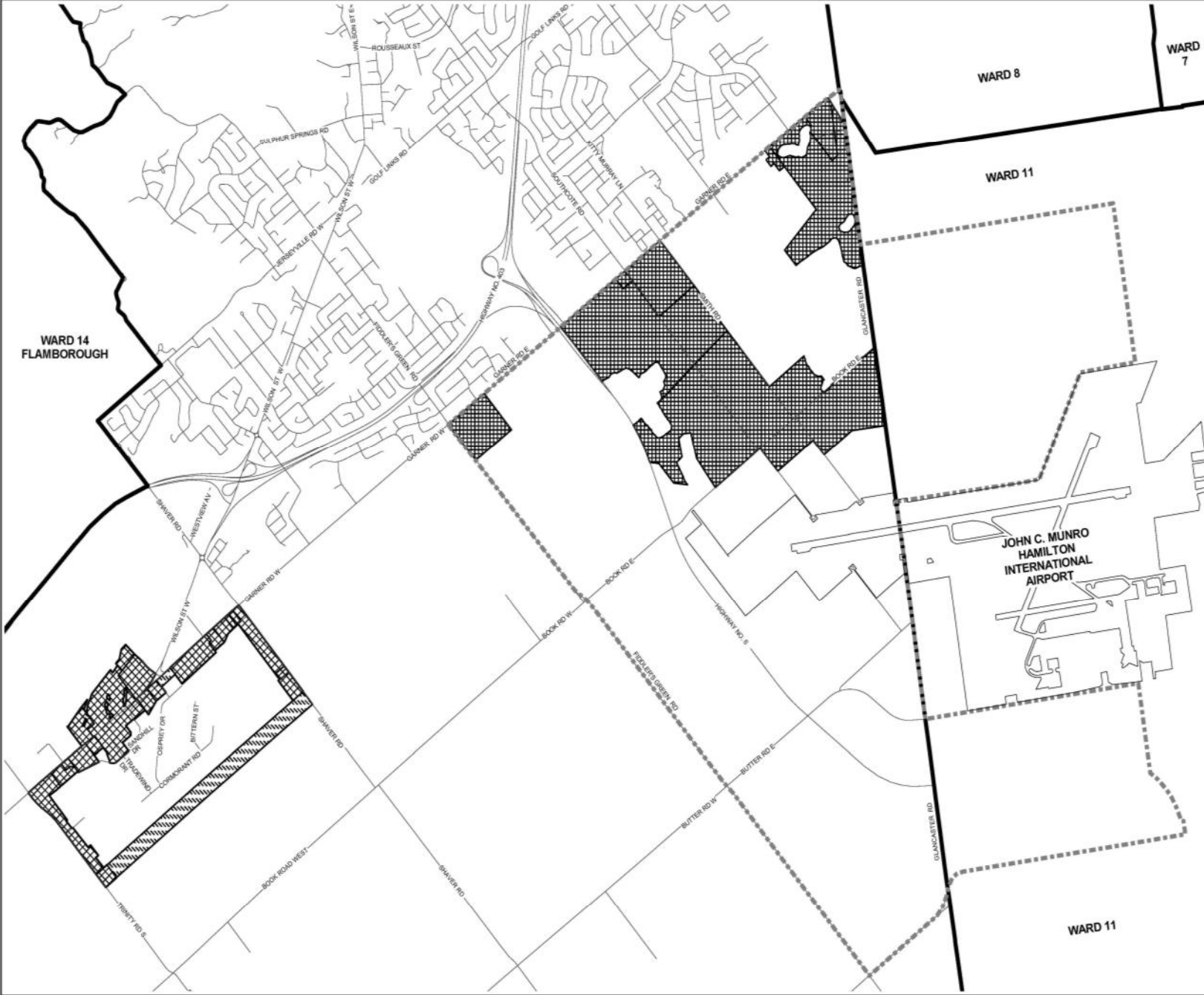
**Zoning for Gaming Facilities:
Ward 11 & 12 - AEGD Boundary**

Date:
January 28, 2013









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**MAP NO. 12
WARD 12 - ANCASTER**



LEGEND

-  M3 (By-Law 05-200)
-  M4 (By-Law 05-200)
-  M11 (By-Law 05-200 Under Appeal)
-  AEGD Boundary
-  Ward Boundary
-  Roads

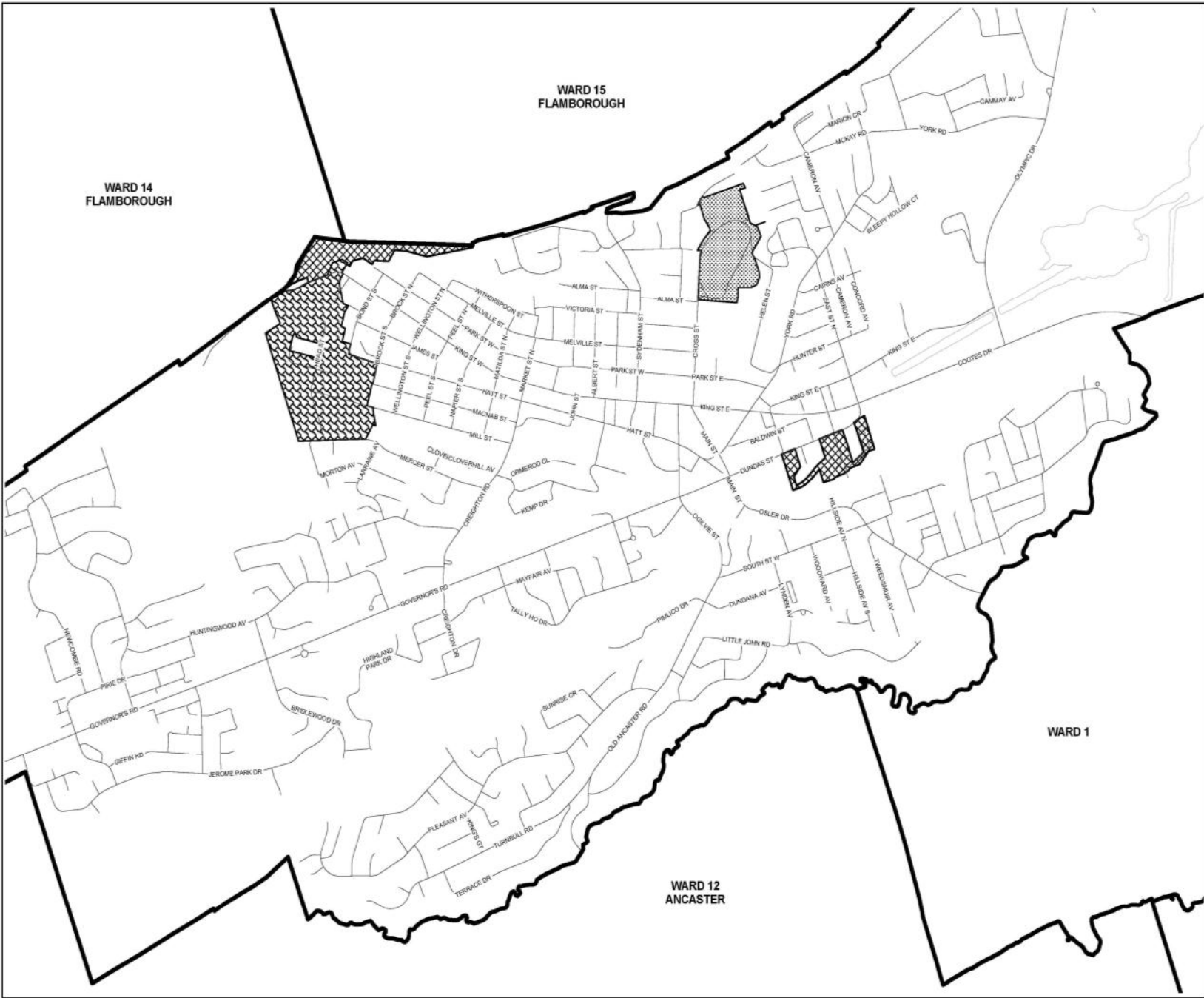
**Zoning for Gaming Facilities:
Ward 12: Ancaster**

Date:
January 28, 2013



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**MAP NO. 13
WARD 13 - DUNDAS**



LEGEND

	M3 (By-Law 05-200)
	M6 (By-Law 05-200)
	P3 (By-Law 05-200)
	Ward Boundary
	Roads

**Zoning for Gaming Facilities:
Ward 13: Dundas**

Date:
January 28, 2013









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MAP NO. 14a)
WARD 14 - FLAMBOROUGH



LEGEND

-  O3-2 (By-Law 90-145-Z)
-  M3 (By-Law 05-200)
-  M6 (By-Law 05-200)
-  Ward Boundary
-  Roads
-  Railways

**Zoning for Gaming Facilities:
Ward 14: Flamborough**

Date:
January 28, 2013



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WARD 12
ANCASTER

WARD 15
FLAMBOROUGH

WARD 13
DUNDAS

WARD 12
ANCASTER


**MAP NO. 14b)
WARD 14
FLAMBORO DOWNS**



WARD 15
FLAMBOUOUGH

WARD 13
DUNDAS

LEGEND

-  M3 (By-Law 05-200)
-  O3-2 (By-Law 90-145-Z)
-  Ward Boundary
-  Roads
-  Railways

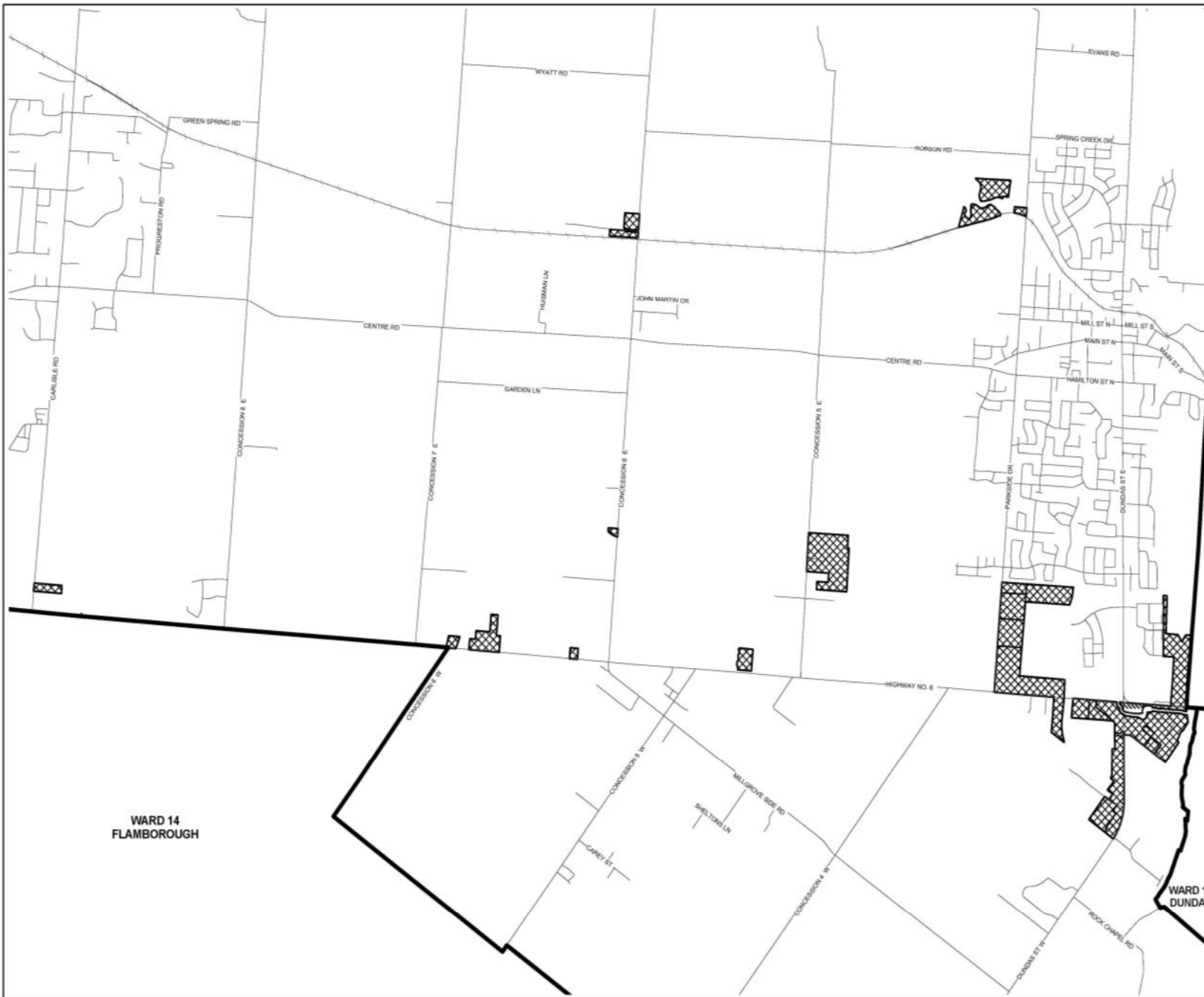
**Zoning for Gaming Facilities:
Ward 14: Flamborough**

Date:
January 26, 2013



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**MAP NO. 15
WARD 15 - FLAMBOROUGH**



- LEGEND**
-  M3 (By-Law 05-200)
 -  M4 (By-Law 05-200)
 -  Ward Boundary
 -  Roads
 -  Railways

**Zoning for Gaming Facilities:
Ward 15: Flamborough**

Date:
January 26, 2013



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