

CITY OF VAUGHAN

EXTRACT FROM COUNCIL MEETING MINUTES OF OCTOBER 30, 2012

Item 2, Report No. 42, of the Committee of the Whole (Working Session), which was adopted, as amended, by the Council of the City of Vaughan on October 30, 2012, as follows:

By approving the following:

That the item be deferred pending a report by staff to Council on the economic impacts of a casino in Vaughan, based on the analysis undertaken in Toronto; and

That once received, Council determine the next steps going forward.

**2 ONTARIO LOTTERY AND GAMING CORPORATION (OLG)- ENTERTAINMENT AND CASINO
COMPLEX CITIZEN FEEDBACK AND VIEWS**

The Committee of the Whole (Working Session) recommends:

- 1) That Clause 1, contained in the following report of the Executive Director, dated October 23, 2012, be approved;
- 2) That staff request OLG to provide the City with an assessment of the social impacts of an Entertainment and Casino Complex, and their approach to mitigate any negative impacts, and include historical information from other existing casinos in the Province;
- 3) That, to better inform Council, staff proceed with undertaking an economic and social impact analysis of being a host site for the OLG Entertainment and Casino Complex;
- 4) That the social impact analysis include data on a casino located in Vaughan versus a casino in a neighbouring municipality;
- 5) That analysis be undertaken of the impact on the Vaughan Metropolitan Centre should the casino be located at the subject site;
- 6) That C1, presentation material entitled, *“Residents’ Perspectives on a Entertainment/Casino Complex in Vaughan (Study Highlights)”* dated October 23, 2012, be received; and
- 7) That the following deputations be received:
 1. Mr. Paul Godfrey, OLG, Yonge Street, Toronto;
 2. Mr. Larry Flynn, OLG, Yonge Street, Toronto;
 3. Mr. Paul Pellizzari, OLG, Yonge Street, Toronto; and
 4. Mr. Mario G. Racco, Checker Court, Thornhill.

Recommendation

The Executive Director in consultation with the City Manager recommends:

1. That the Staff report and the presentation by Pollara be received, and;
2. Staff request OLG to provide the City with an assessment of the social impacts of an Entertainment and Casino Complex, and their approach to mitigate any negative impacts, and;
3. To better inform Council, Staff proceed with undertaking an economic impact analysis of being a host site for the OLG Entertainment and Casino Complex.

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Contribution to Sustainability

Green Directions Vaughan embraces a *Sustainability First* principle and states that sustainability means we make decisions and take actions that ensure a healthy environment, vibrant communities and economic vitality for current and future generations.

Economic Impact

If recommendation one is approved, the costs associated with undertaking an economic impact analysis could range from \$25,000 to \$35,000.

Communications Plan

N/A

Purpose

As per Report No. 29 of the Committee of the Whole, this report provides Council with an update to the consultation process to assess the interest and support of the residents and businesses in Vaughan of having an OLG facility located within the City of Vaughan as part of a world class cultural and entertainment district.

Background - Analysis and Options

As part of the Ontario Government's new direction to OLG in July of 2010, OLG was asked to complete a comprehensive strategic review of the lottery distribution network and land-based gaming facilities. The result of the review was an OLG report to government on March 12, 2012 titled, *Modernizing Lottery and Gaming in Ontario: Advice To Government*.

The report concluded that by 2017-18, OLG will be: A modern, sustainable organization, which will increase net profit to the Province by an additional \$1.3 billion annually – all while upholding responsible gambling standards.

The report identified where and how gaming will be offered in the province across all types of games and all channels through the creation of geographic areas called, "Gaming Zones".

In addition the report identified that the OLG initiatives will result in:

- New private sector capital investment - an additional \$3 billion
- Employment growth by more than 2,300 net new lottery and gaming industry jobs.
- Employment growth of an estimated 4,000 service sector jobs in hotels, restaurants, entertainment centres, and retail.

Gaming Zones

OLG identified 29 gaming zones where existing or new gaming facilities would be permitted following municipal and other approvals. OLG based the zones on a business model that is designed to maximize revenue for the province. Factors such as proximity of a gaming location to other gaming facilities and residential areas were measured to determine the zones.

The proposed zones for the location of OLG gaming facilities have not been finalized. The geographic boundaries may be adjusted based on ongoing discussions with relevant stakeholders, municipalities and information received through the OLG procurement process. A portion of Vaughan has been identified as part of a gaming zone which also includes the current OLG site, Woodbine Racetrack and Slots.

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OLG's Procurement Process for Modernization

On May 17, 2012, OLG announced a new competitive and transparent procurement process to seek input from potential vendors as it expands regulated private-sector gaming in Ontario. The multi-stage process includes:

- *Request for Information (RFI)* – (Now underway) allows the OLG to gather valuable information from potential regulated vendors and help determine the range of options available in the market and assess potential vendor interest, as well as risks. The RFI was issued on May 17, 2012 and closes on July 4, 2012. The RFI is published on MERX tendering system (www.merx.com). The RFI will be followed by an RFP in the fall of 2012.

OLG is continuing conversations with municipalities across the province to gauge interest in participating in the process, and will focus the RFP process only on communities which are interested in having a facility.

- *Request for Pre-Qualification (RFPQ)* – (potential release summer 2012) gives vendors interested in the RFP an opportunity to submit information on their financial and technical capabilities. OLG will then select pre-qualified vendors.
- *Request for Proposal (RFP)* – (potential release fall 2012) gives the selected vendors the opportunity to bid on specific products and/or services within the gaming business, and identify sites. Once the bidding process is complete, OLG will select vendors to become the regulated private sector providers for gaming and lottery gaming sites.

Entertainment and Tourist Potential for Vaughan

The City's Economic Development Strategy clearly articulates that in order to support the City as a destination, there are opportunities for enhancement of the existing entertainment amenities that are currently found in the area. Overall, there are a number of creative and cultural industry strengths dispersed across the city, making it difficult for residents and tourists to package these amenities into coordinated "Vaughan experiences". By creating stronger virtual and physical connections, a hub and spoke concept, radiating out from a central location, the city can enhance the overall quality of its cultural and tourism industries.

Therefore, the private sector (through the OLG RFP process) could fund and build an entertainment district anchored by a gaming facility in an appropriate area in Vaughan, such as the Vaughan Metropolitan Centre, and bring benefits that support the City's economic development strategy, and be a catalyst for arts, culture and tourism development such as;

- Build a performing arts/concert styled venue(s).
- A convention facility with the ability to host international sized conventions.
- Create annual revenue to the municipality from gaming proceeds.
- Anchor a Forbes Five Star rated accommodation(s).
- Generate large scale direct and indirect job creation.

The private sector infrastructure investment is expected to be realized in the next five to ten years to achieve the desired goals of the OLG modernization process.

Understanding Citizen's Views

Staff undertook a research initiative that engaged the Vaughan Community as it relates to the OLG's expansion of gaming in Ontario and the opportunity of siting a large-scaled entertainment and casino complex in the Greater Toronto Area. To that end, the following objectives were set:

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- Assess residents' general attitudes toward casinos;
- Determine citizens views as pros and cons of having a casino in the GTA and specifically in the City of Vaughan; and
- Understand attitudes toward trade-offs between potential economic benefits and social issues associated with a casino.

The Consultant

Due to the timing of the OLG process and to prepare a report back to Council in a timely manner, Staff followed the Council approved purchasing policy guidelines to undertake a single source contract. The contract, in the amount of \$20,000, to undertake the qualitative and quantitative research was awarded to Pollara Research. Pollara is one of Canada's leading public opinion and market research firms providing strategic advice based on accurate measurement of opinions, attitudes and perceptions. Leading the project was Executive Vice President, Mr. Robert Hutton.

Mr. Hutton has extensive experience in advanced research design and analysis, particularly in the areas of loyalty, branding, advertising testing, segmentation, perceptual mapping, innovative non-linear online design, panel building, and social media. Mr. Hutton has undertaken research initiatives across Canada, Asia Pacific, Europe and the United States.

Research Methods

Given the nature of the subject matter, staff recognized that it was important to use more than one type of research method to better understand residents' views. Therefore, three different methods were adopted to meet the objectives:

- **Focus Groups** – The focus groups (2) which were held Saturday, July 21, had a good mix of age (18 or older), income, education, and representation from all five Vaughan communities. Each focus group was split by gender, as to better address potentially different reactions/attitudes and consideration set among men and women, and to ensure that those opinions were explored in sufficient depth.

Key Findings included; (Complete Report Attachment 1: Dated July 25, 2012)

- Benefits associated with casinos outweigh the drawbacks
- A casino in the GTA would be welcome (but not in Toronto)
- Casino in Vaughan as a concept is viewed in a positive light, but when discussed in the context of crime, women's views can be swayed. Men don't see it as an issue.
- Traffic congestion is a big concern for everyone.
- All agree that the City has an obligation to explore the fiscal viability of this opportunity.
- The opportunity must be examined in the context of the City's other priorities

- **Survey** – An on-line survey was created using information gained from the focus groups. The survey took the respondent 10-12 minutes to complete and was completed by 500 residents during August 10 and 18. The survey was carefully designed to ensure that it covers various perspectives, was statistically sound and presented the discussion of a casino in a relevant and unbiased context, thus giving residents a comprehensive picture of what such an endeavor could mean to the City. Furthermore, the survey was designed to ensure that the respondents' answers were based on a good understanding of the subject matter rather than on reactionary, surface answers typical of a flash poll. The results were weighed by age and gender to 2006 Canada Census proportions to ensure that the results are representative of the opinions of the general public. The results are accurate $\pm 4.38\%$ nineteen times out of twenty. Key findings included; (Complete Report Attachment 2: Dated August, 2012)

- In general, the overall trends in attitudes hold true across demographic segments
- Overall, positive or neutral impressions of casinos outweigh negative ones.
- For a majority (78%), casino visits are seen as an entertainment destination, an outing that offers shows, restaurants, nightlife, with gambling being only a part of that experience. Only 22% go there exclusively to gamble.

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- In terms of advantages associated with a casino, a majority think of the economic benefits a casino brings: jobs (61%) and revenues for the city (55%) and businesses (54%).
 - As for drawbacks- social issues and an increase in traffic congestion are on the minds of nearly seven-in-ten citizens (each), while worries about undesirable populations are mentioned by 61%.
 - A majority (59%) agree that benefits of having a casino /entertainment district are too great NOT to consider it, even in light of potential drawbacks.
 - Yet a vast majority (77%) agree (40% strongly) that the City of Vaughan has a financial obligation to assess the financial benefits of such development within the city's boundaries.
 - Citizens feel even more strongly about the city's obligation to assess social impact of such development in Vaughan (85% agree, 51% strongly).
- **Information Session** – The information session gave residents the opportunity to learn about the topic from different perspectives. To this end, staff was in attendance at the information session which included presenters from the following organizations: Pollara, who presented the findings of the survey and OLG, who explained the concept and expansion of gaming in the GTA. The Information Session was attended by approximately 125 citizens and business owners. From the market researcher's experience, it is important to note that civic "open houses" tend to attract a highly unrepresentative section of the population, that typically comprise activists on both sides of an issue, and individuals with a motivated political agenda. They virtually never form a valid representation of a population.
- At the conclusion of the session, Pollara found that the questions written on the cards, from those in attendance, were completely consistent with the focus groups and survey and could be grouped into three categories:
1. Economic impact questions- which were by far the majority, often very specific;
 2. Location queries- which typically involved details about the suggested site and site impacts, and;
 3. Social concerns- which were generally formed around perceptions and lack of factual information.

Regional Implications

NA

Conclusion

The OLG has taken an open and transparent approach to modernize all aspects of its business by 2017-18 with the objectives of:

1. Becoming more customer-focused.
2. Expanding regulated private sector delivery of lottery and gaming.
3. Renewing OLG's role in oversight of lottery and gaming.

The opportunity for Vaughan to be the site of an entertainment and casino district located in an appropriate area of the City such as the Vaughan Metropolitan Centre or Highway 427 and Highway 7 could potentially provide the City with a significant non-taxation revenue source.

This fact was echoed throughout all of the research undertaken. Citizens views on Vaughan being the site for the OLG's entertainment and casino complex, either positive or negative, confirmed that the City had a fiscal responsibility to investigate all aspects related to the economic impact of an entertainment and casino complex in the City.

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As the City continues to position itself as the gateway of economic activity to the Greater Toronto Area this opportunity may accelerate its city building process and strengthen its arts, culture and economic base. This advantageous competitive position will significantly contribute to Vaughan being the key economic development driver of the GTA over the next twenty years, and suggest that Vaughan will increasingly be the gateway for goods, business, people and investment travelling to and from the GTA.

Attachments

Attachment 1 - Residents' perspectives on a casino in Vaughan, July 2012

Attachment 2 - Residents' Perspectives on a Casino/Entertainment District in Vaughan,
August 2012

Report prepared by:

Tim Simmonds, Executive Director, Office of the City Manager

(A copy of the attachments referred to in the foregoing have been forwarded to each Member of Council and a copy thereof is also on file in the office of the City Clerk.)

COMMITTEE OF THE WHOLE WORKING SESSION – OCTOBER 23, 2012

ONTARIO LOTTERY AND GAMING CORPORATION (OLG)- ENTERTAINMENT AND CASINO COMPLEX CITIZEN FEEDBACK AND VIEWS

Recommendation

The Executive Director in consultation with the City Manager recommends:

1. That the Staff report and the presentation by Pollara be received, and;
2. Staff request OLG to provide the City with an assessment of the social impacts of an Entertainment and Casino Complex, and their approach to mitigate any negative impacts, and;
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Contribution to Sustainability

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Economic Impact

If recommendation one is approved, the costs associated with undertaking an economic impact analysis could range from \$25,000 to \$35,000.

Communications Plan

N/A

Purpose

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Key Findings included; (Complete Report Attachment 1: Dated July 25, 2012)

- Benefits associated with casinos outweigh the drawbacks
- A casino in the GTA would be welcome (but not in Toronto)
- Casino in Vaughan as a concept is viewed in a positive light, but when discussed in the context of crime, women's views can be swayed. Men don't see it as an issue.
- Traffic congestion is a big concern for everyone.
- All agree that the City has an obligation to explore the fiscal viability of this opportunity.
- The opportunity must be examined in the context of the City's other priorities

- **Survey** – An on-line survey was created using information gained from the focus groups. The survey took the respondent 10-12 minutes to complete and was completed by 500 residents during August 10 and 18. The survey was carefully designed to ensure that it covers various perspectives, was statistically sound and presented the discussion of a casino in a relevant and unbiased context, thus giving residents a comprehensive picture of what such an endeavor could mean to the City. Furthermore, the survey was designed to ensure that the respondents' answers were based on a good understanding of the subject matter rather than on reactionary, surface answers typical of a flash poll. The results were weighed by age and gender to 2006 Canada Census proportions to ensure that the results are representative of the opinions of the general public. The results are accurate $\pm 4.38\%$ nineteen times out of twenty. Key findings included; (Complete Report Attachment 2: Dated August, 2012)

- In general, the overall trends in attitudes hold true across demographic segments
- Overall, positive or neutral impressions of casinos outweigh negative ones.
- For a majority (78%), casino visits are seen as an entertainment destination, an outing that offers shows, restaurants, nightlife, with gambling being only a part of that experience. Only 22% go there exclusively to gamble.
- In terms of advantages associated with a casino, a majority think of the economic benefits a casino brings: jobs (61%) and revenues for the city (55%) and businesses (54%).
- As for drawbacks- social issues and an increase in traffic congestion are on the minds of nearly seven-in-ten citizens (each), while worries about undesirable populations are mentioned by 61%.
- A majority (59%) agree that benefits of having a casino /entertainment district are too great NOT to consider it, even in light of potential drawbacks.
- Yet a vast majority (77%) agree (40% strongly) that the City of Vaughan has a financial obligation to assess the financial benefits of such development within the city's boundaries.
- Citizens feel even more strongly about the city's obligation to assess social impact of such development in Vaughan (85% agree, 51% strongly).

- **Information Session** – The information session gave residents the opportunity to learn about the topic from different perspectives. To this end, staff was in attendance at the information session which included presenters from the following organizations: Pollara, who presented the findings of the survey and OLG, who explained the concept and expansion of gaming in the GTA. The Information Session was attended by approximately 125 citizens and business owners. From the market researcher's experience, it is important to note that civic "open houses" tend to attract a highly unrepresentative section of the population, that typically comprise activists on both sides of an issue, and individuals with a motivated political agenda. They virtually never form a valid representation of a population.

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Regional Implications

NA

Conclusion

The OLG has taken an open and transparent approach to modernize all aspects of its business by 2017-18 with the objectives of:

1. Becoming more customer-focused.
2. Expanding regulated private sector delivery of lottery and gaming.
3. Renewing OLG's role in oversight of lottery and gaming.

The opportunity for Vaughan to be the site of an entertainment and casino district located in an appropriate area of the City such as the Vaughan Metropolitan Centre or Highway 427 and Highway 7 could potentially provide the City with a significant non-taxation revenue source.

This fact was echoed throughout all of the research undertaken. Citizens views on Vaughan being the site for the OLG's entertainment and casino complex, either positive or negative, confirmed that the City had a fiscal responsibility to investigate all aspects related to the economic impact of an entertainment and casino complex in the City.

As the City continues to position itself as the gateway of economic activity to the Greater Toronto Area this opportunity may accelerate its city building process and strengthen its arts, culture and economic base. This advantageous competitive position will significantly contribute to Vaughan being the key economic development driver of the GTA over the next twenty years, and suggest that Vaughan will increasingly be the gateway for goods, business, people and investment travelling to and from the GTA.

Attachments

Attachment 1 - Residents' perspectives on a casino in Vaughan, July 2012

Attachment 2 - Residents' Perspectives on a Casino/Entertainment District in Vaughan,
August 2012

Report prepared by:

Tim Simmonds, Executive Director, Office of the City Manager

Respectfully submitted,

Tim Simmonds
Executive Director, Office of the City Manager

Residents' perspectives on a casino in Vaughan

Prepared for:

City of Vaughan

July 25, 2012

POLLARA ●●●●●

Background and Objectives

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- Through research (qualitative and quantitative), the City wishes to understand citizens' attitudes toward the idea of building a casino in the City of Vaughan, and toward the various economic and social aspects that such a development would entail.
- Citizens' feedback (both qualitative and quantitative) will play an integral part of any future discussions or debates on the subject.
- This report covers findings from the qualitative phase of research, which will provide a framework for the quantitative study.

Methodology

3

- Qualitative research was conducted in the form of two focus groups on July 21, 2012 among the general population of City of Vaughan residents.
- The groups were split by gender to prevent any gender-based influences on reactions and to ensure that those opinions were explored in sufficient depth.
- Recruitment criteria for the groups:
 - Good mix of age (18 or older), income, and education
 - Good mix of Vaughan's five communities
 - Have resided in one of Vaughan's communities for at least 2 years
 - A total of 8 individuals joined each group

Key Findings

Benefits associated with casinos outweigh the drawbacks

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- Respondents recognize the dual nature of casinos, but for most of them it is a positive experience. Casinos are seen as a “place to dream” in an increasingly frightening world.
- They view the casino experience as a form of entertainment; an outing that is about fun and pleasure associated with all the amenities and extras that come with casinos: other entertainment venues, shows, concerts, restaurants, etc.
- A casino by itself would be of no interest to most. Respondents envision a casino/retail/hotel/entertainment destination.
- While there is a general recognition of the social ills that society can associate with casinos: gambling, addiction, crime, etc., most come to the conclusion that it cannot be reconciled and the benefits associated with casinos (i.e., economic growth, job creation, revenue generation, development of auxiliary infrastructure and entertainment, as well as the entertainment choices) outweigh social ills that such development may entail.

A casino in the GTA would be welcome (but not in Toronto)

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- When asked about the subject of a casino in the GTA, the reactions were mostly positive.
- Generally, both men and women felt that the GTA area (and many immediately assumed Vaughan) would benefit from a casino entertainment complex from both economic and social standpoints. It would generate revenues, add jobs, stimulate entertainment/infrastructure development) and would provide more much-needed entertainment options, without having to go 'downtown' (Toronto), which is thought of by many as difficult to access and unsafe.
- Many felt that Vaughan would be a more suitable place for a casino for a variety of reasons:
 - better access
 - lower crime rate/better safety
 - more real estate space
 - greater need for entertainment
 - more progressive and effective city management, much more capable of executing this type of development than Toronto

Casino in Vaughan as a concept is viewed in a positive light, but when discussed in the context of crime, women's views can be swayed. Men don't see it as an issue.

- However, when the discussion steered toward crime, women began to voice strong concerns, fearing that a casino, particularly in the Vaughan Metropolitan Centre – which they saw as too close to the notorious Jane and Finch area – would compromise the safety of their community. So while all women agreed that it would be nice to have entertainment options closer, introducing the Jane/Finch association pushed attitudes towards favoring a Mississauga location.
- In contrast, while men recognized the potential downsides of a casino, they didn't believe it would hurt the community. On the contrary, most felt that the benefits – particularly financial – outweighed potential issues, and they would not want casino-related revenues to go to Mississauga.
- Most found the discussed location ideal for a casino complex.
- They also felt that the City would be able to effectively implement crime prevention and to uphold the City's reputation for safety, and would be better equipped than Toronto to mitigate the typical social concerns. Overall, respondents felt that Vaughan could have an "adult conversation" that Toronto could not have, and "could do it right".

Traffic congestion is a big concern for everyone.

- The biggest concern for men, and the second biggest for women (after safety) associated with having a casino in Vaughan was the issue of increased traffic congestion this type of development would entail.
- The views were split on whether the traffic issue could be resolved.
- Many men and some women thought that the city management would be able to find a viable solution to the traffic issue. Others were less optimistic that the traffic issue could be effectively addressed.

All agree that the City has an obligation to explore the fiscal viability of this opportunity.

- While participants, especially women, were swayed in their favorable views toward having a casino in Vaughan by the crime issue, all participants unanimously agreed that the City's management had an obligation from a fiscal standpoint to explore the viability of this opportunity.
- Several mentioned that in addition to the economic viability, the city would also need to investigate the impact of gambling and crime associated with developing casinos in their community.

But this opportunity must be examined in the context of the City's¹⁰ other priorities

- There was a comment that brought to focus the importance of discussing the subject of a casino in the context of other priorities for Vaughan, and this comment should be explored in depth in the quantitative research phase.
- It suggested that it would be unacceptable for citizens if the City placed priority on casino development, ahead of a much needed hospital (and possibly other services).
- The hospital matter could be used by opponents as a means to gather negative support.

Suggested direction for consideration

- There is a need for extensive consultations with citizens to quantitatively verify the findings of the focus groups.
- Stage 2 of the research (a quantitative study) will provide one such opportunity for feedback as a preparation for city-wide consultations.
- The quantitative study will provide a clearer picture of the reactions and attitudes to topics identified in the focus groups. It will aim to...
- Assess residents' attitudes toward casinos in general/ a casino in Vaughan
- Identify key benefits to the community
- Identify key concerns as well as most effective ways to manage those concerns, e.g.:
 - Safety concerns associated with having a casino in "people's backyards" (particularly among women)
 - Gambling concerns and its impact on community
 - Increased traffic
 - Negative stigma associated with casinos
- Determine whether in citizens' view, the benefits of such a project outweigh potential drawbacks
- Determine the need for the City to explore the fiscal viability and social impact of a casino complex in Vaughan

Detailed Findings with Verbatim

Top-of-mind perceptions of Casinos

- Respondents recognize the dual nature of casinos, seeing its positive and negative aspects, although the discussions overall indicate that for most, first-hand experiences drive positive views, while most negative ones are based on the views prevalent in the public domain.

Pros	Cons	Neutral
Entertainment, Outing, Action	Social ills, Gambling, Trouble, Toxic	Vegas, Cruise ships
Fun, Enjoyment, Happiness, Pleasure	Crime, Rough crowd, Pawn shops, Bail bonds	Slot machines
Dreaming, Winning, Luck, Possibilities	Addiction, poverty, families	
Jobs, Revenue, Venues	Crowds	
Place to Dream	Traffic, Congestion, Travel (too far)	
Exotic, Mystique	Noise, Bad Crowd	

Experiences with Casinos

- All respondents in both groups have been to casinos, with some men visiting casinos more often than women.
- Most participants (in both groups) enjoy the whole casino experience, but not just casino and gambling only. They view the casino experience as a form of entertainment; an outing that is about fun and pleasure associated with all the amenities and extras that come with casinos: shows, concerts, restaurants, etc.
- A casino by itself would be of no interest to most.
 - *"It's an entertainment, like going to the movies."*
 - *"It's for all ages. It's an outing."*
 - *"It's not just about gambling. It's enjoyment."*
 - *"It's lots of entertainment value."*

Experiences with Casinos

- Vegas is the gold standard for casino entertainment that stimulate all senses, offering a plethora of experiences, both within casinos (*"bells, sounds of dropping coins, people screaming, sparking lights"*) and outside of them (*"complementary food, drinks, shows, etc. It's a great show"*).
- There was a comment that the entertainment value in Canadian (Ontario) casinos falls short of the experiences in the U.S., especially Vegas: casinos here are more mechanized; quieter, somewhat dehumanized, with too many rules, taking the entertainment out of it. They also offer less value for the money (fewer complementary drinks, food, or other extras).
 - *"In the U.S. you can get any food, any meal of any value of any time. Here it's computerized and timed; you get meal value based on how much you spent."*
 - *"There is no humanness in Canadian casinos."*

The dark side of casinos

- There is a general recognition of the social ills the society strongly associates with casinos: gambling, addiction, crime, etc.
- Most come to the conclusion that, like with any other addiction, it cannot be reconciled.
- The problems are universal, and while having casinos creates more opportunities for amplifying the addiction, problem gamblers will always find ways to feed their addiction, whether there is a casino nearby or not. Respondents recognize that gambling has migrated online and that existing casinos have declined due to immediate cross-border competition, so see a revenue recapture opportunity.
- For a vast majority of the population who can exercise self-control and engage in healthy gambling, casinos are just another choice of entertainment, which they shouldn't be denied. As with other addictions, the onus is on each individual to exercise self-control.
- A comment was made that with the media has sensationalized the whole concept of problem gambling, villainizing casinos and gambling even though for many it has lots of entertainment value.
 - *"Not having a casino won't stop people from gambling if they have an addiction. Making something unavailable won't stop it."*
 - *"I have mixed feelings – for me it [casino] means good access to concerts, good opportunity to go out for dinner, but for people with a problem, it's putting it under their noses and creating accessibility. It can't be reconciled."*
 - *"If anyone has an addiction, they have to control themselves, they are responsible for themselves."*

The dark side of casinos is recognized, but their benefits outweigh drawbacks

- Increased crime is another undesirable aspect often associated with casinos that respondents were aware of, but – while most felt it was unfortunate, and some agreed that casinos probably attracted crime – most also were of the view that crime was ubiquitous, with or without casinos.
- A couple of participants (man and woman) commented that there had been no evidence (in the news) that the Woodbine race track or Casino Rama have brought up crime levels in these areas.
- Still, in both groups there was a general agreement that the benefits associated with casinos (i.e., economic growth: job creation, revenue generation, development of auxiliary infrastructure and entertainment, as well as the entertainment choices) outweighed social ills that such developments may entail.
- This view was particularly strongly voiced in the men's group.
 - *"The positive is that it will create jobs. It may increase crime, but crime is going up anyway."*

Attitudes toward a Casino in the GTA

- When asked about the topic of a casino in the GTA, the reactions were mostly positive.
- Generally, both men and women felt that the GTA area (and many immediately assumed Vaughan) would benefit from a casino entertainment complex (although not just a stand-alone casino), as it would give them more entertainment options without having to go 'downtown' (Toronto), which is thought of by many as unsafe and difficult to access.
- Respondents generally felt there was a lack of entertainment infrastructure in Vaughan, and a casino entertainment complex nearby would be welcome. The entertainment aspect was particularly strongly voiced in the women's group.
 - *"There is no night life in Thornhill after 10 pm. There are no coffee shops, restaurants, etc. open even on Saturday night."*
 - *"If there was a casino, it would improve everything. Downtown is vibrant. There is nothing here."*
 - *"I don't like to go downtown. It's too far. I went for dinner, and came back at 2am. I would like to have something closer for drinks, dinner."*
 - *"It creates social opportunities (outside Toronto) in an area with not so many evening activities to do. I have to go to Brampton for a show. If it's downtown (Toronto), I wouldn't go. There is more drugs and crime downtown. I don't like going there. I wouldn't mind going for a show to a place closer by."*
 - *"I like my community, but at the same time I would like some entertainment closer so I don't have to go to Woodbine or downtown to a club. So a mini-Vegas sounds good."*

Attitudes toward a Casino in Toronto/GTA/Vaughan

- Both groups, but especially men, saw the casino concept through the lens of a revenue generating opportunity for the area, and for the City of Vaughan in particular.
- Other economic benefits associated with a casino complex in the GTA were emphasized over and over again in the groups, most strongly by men.
- Most respondents in both groups felt that Toronto would not be suitable for a casino, citing distance, difficult access/parking, high crime rate, homelessness, drugs, sufficient entertainment infrastructure already in place (no need for more entertainment), and ineffective City management, among others.
- There was a general agreement that Vaughan, or another GTA location, such as Mississauga, would be a more suitable place for a casino for a variety of reasons, naming better access, lower crime rate/better safety, more real estate space, greater need for entertainment, and in the case of Vaughan, more progressive and effective city management which was seen as much more capable of executing this type of development than Toronto.
- Many of course also viewed it through the lens of economic benefits (revenue generation, jobs, auxiliary development—entertainment/infrastructure) as well as social ones (more entertainment options, enhanced reputation, tourism destination) associated with casino development Vaughan. (Detailed list of pros and cons on slide 30).

Attitudes toward a Casino in GTA/Vaughan

- When the discussion steered toward the downside of casinos and the social ills associated with it, most women and men did not see gambling becoming a large issue, recognizing again that it is a problem, as with access to gambling there will be more opportunities for problem gamblers, but it is not the casinos that were the issue, it was the individuals who needed to deal with their problems.
 - *"Social ramifications of gambling opportunities nearby are irrelevant. Gamblers will drive to a casino wherever it is, in Niagara or Vaughan."*
 - *"If you have an addiction, you will find a way to do it. You will find a way to get there."*
- However, when crime was brought up, women began to express concerns about the potential for increased crime in their safe community, which – many felt – a casino would bring about, negatively affecting the families in the residential areas nearby the development. These associations were entirely centered on Jane/Finch proximity.
- When Jane/Finch entered the discussion, while all women agreed that it would be nice to have entertainment options closer, most felt having it in Vaughan was too close for comfort.
 - *"I would like to have something closer so I don't have to go downtown, as long as it is not in my backyard."*
 - *"I'd prefer it in Mississauga. A little further away. I don't want it in my backyard."*

Attitudes toward a Casino in Vaughan

- The location was questioned by women when proximity to Jane/Finch was raised.
- Most felt that it was too close to the Jane and Finch area, notorious for high crime, and that the crime would spill over to the casino complex, and consequently the residential areas, with the subway extension making it that much easier to transport crime to Vaughan.
- The fact that the potential location would be a primarily industrial area, blocked off by two highways, did little to mitigate their concerns.
 - *"Jane and Finch is already dangerous. Subway will make it all connected. It will bring bad element here."*
 - *"People will be scared to go there. Jane and Finch and Jane and Highway 7 it's all too close. When you bring this type of business to the area, you will extent the Jane-Finch issue further."*
 - *"I'm not comfortable with the Jane corridor. Casino would attract the gangs. It's too easy of the bad element to get there."*

Attitudes toward a Casino in Vaughan

- To be able to feel comfortable with the location (and casino in Vaughan overall), women would need to be convinced that their safety and the safety of other families living in Vaughan, and particularly near the development wouldn't be compromised.
- They would expect to see:
 - a police station set up in the area
 - a lot of security
 - well-lit parking
 - lots of lights everywhere in the complex
 - shuttle buses from Vaughan transit points to take people to the casino complex
- On the surface, many women would prefer to have a casino in Mississauga, or further North, although they also recognized the need for selecting a location that was economically viable, not too remote and with highway access.
- Those women who were not swayed by the Jane/Finch argument on the location felt it was far enough from the residential areas that the Jane crime was not likely to negatively affect the development and the neighbourhood. They brought Vegas as a positive example.
 - *"Crime is an issue everywhere. I don't have a problem with this area."*
 - *"You even have areas in Vegas where you wouldn't walk. If you stay on the main strip, with lots of lights and people, you are pretty safe."*

Attitudes toward a Casino in Vaughan

- In contrast, men saw a casino primarily as an opportunity to recapture revenues from other casinos, inject new revenues into the city, develop the entertainment and auxiliary infrastructure (entertainment venues, bars, restaurants, etc.)
- They thought that there was strong potential to positively change the social dynamics of the city by marrying the economic and social opportunities associated with a casino.
- While men recognized the possible downsides of a casino, they didn't believe it would hurt the community. On the contrary, most felt that the benefits – particularly financial– outweighed potential issues.
- They did not see the crime increase as a problem that would affect Vaughan. They felt that the City would be able to effectively implement crime prevention and to uphold the City's reputation for safety .
- They also mentioned (several times throughout the discussion) that the city had the right management to execute this type of project effectively.
 - The example of excellent zoning decisions was brought up, e.g., how well the city was able to effectively integrate Canada's Wonderland with residential areas.
 - *"Vaughan has done a fantastic job at zoning. It managed its growth through very smart and visionary zoning practices, which will continue and that will put faith in municipal leaders to do a good job."*

Attitudes toward a Casino in Vaughan

- Most men found the potential location (Vaughan Corporate Centre) ideal for a casino complex; it was nowhere near residential areas, would already be close to some existing commercial development (e.g., the Colossus) and it would be easily accessible from the highway.
 - *"If you have to have it in Vaughan, that's the place to put it."*
- For the most part, men did not believe that this particular location would attract the Jane and Finch crowd and crime associated with it. They felt that crime concentrated around residential (subsidized housing), not industrial areas, so the location would not have a negative impact on a casino or the neighbourhood. Similarly, they didn't see the subway extension as a conduit for transporting crime into the complex and the neighbourhood.
 - *"There are always all kinds of potential for crime, but this is not a show stopper."*
 - *"Having a casino in Vaughan is not going to increase social issues – they will always exist."*
 - *"It [subway] won't have a big impact. This is industrial area, not their turf."*
 - *"Would it bring more crime to Vaughan? Possibly, but it will still bring revenue with it. You need to accept it."*
- Other locations they saw as viable were somewhere along the highway 400 corridor, e.g., across from Vaughan Mills.

Attitudes toward a Casino in Vaughan

- The biggest concern for men, and the second biggest for women (after safety) associated with having a casino in Vaughan (and in the Vaughan Corporate Centre in particular), was the issue of increased traffic congestion this type of development would entail.
- All agreed that it would make the already heavy traffic even worse, particularly around Highways 400 and 7.
- The views were split on whether the traffic issue could be resolved.
- Many men and some women thought that the city management would be able to find a viable solution to the traffic issue by improving the infrastructure, building more roads, including casino-only highway exits, which would accommodate the casino traffic.
- Others were less optimistic that the traffic issue could be effectively resolved.
 - *"It's a good location, but the extra traffic will pack it completely."*
 - *"They have a problem there already. With a casino, it will be crazy."*
 - *"We already have bad weekend and cottage traffic. Traffic would cause people not to come."*

Preferred Casino Location: Vaughan vs. Mississauga

- When asked whether they would prefer a casino in Mississauga instead of Vaughan, most women were much more comfortable with Mississauga, as it would be “*close, but not in their backyard*”, and most would be willing to forgo the economic benefits associated with casino development in order not to jeopardize their community’s safety. However, this was subsequent to the Jane/Finch discussion, which had undue influence.
 - “*I’d prefer Mississauga – I wouldn’t go as often, but at least it wouldn’t be scary here.*”
 - “*Mississauga – I would prefer it next door.*”
 - “*Mississauga – I don’t want it in my backyard.*”
- In contrast, most men saw a casino in Mississauga as a big loss of potential revenue for Vaughan, although a couple were more comfortable with a casino a bit further away, and Mississauga was a good option.
- Some men also felt that Vaughan had a better base for this type of development than Mississauga.

Should City of Vaughan investigate the casino opportunity?

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- Despite any reservations toward having a casino in Vaughan, all participants unanimously agreed that the City's management had an obligation from a fiscal standpoint to explore the viability of this opportunity.
 - *"They should investigate any business that can impact the community."*
 - *"A progressive city like Vaughan owes it to its citizens to look into it."*
 - *"Any economic proposal should be investigated."*
 - *"It would be negligence [of the City] if the didn't."*
 - *"They should let us vote on it to make sure that majority wins."*
 - *"It's their [the City] responsibility to see if it is viable."*
 - *"This is a fiscally responsible thing to do – the conversation should be on the table."*
- There was a comment that if Vaughan wanted to stay progressive it would need to keep coming up with innovative ways to progress and a casino could be one of them.
 - The casino concept presented the City with an opportunity to do it right and maintain and increase its reputation as a progressive City.
- Several mentioned that in addition to the economic viability, the city would also need to investigate the impact of gambling and crime associated with casino development on the community (e.g., by examining other areas with casinos, such as Woodbine or Casino Rama).

Casino opportunity in the context of City's other priorities

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- There was one comment from a participant in the men's group that brought to focus the importance of discussing the subject of a casino in the context of other priorities for Vaughan, and this comment should be explored in depth in the quantitative research phase.
- The comment suggests that it would be unacceptable for citizens if the City placed priority on casino development, ahead of a much needed hospital.
 - *"I'm a fan of a casino, but I would be very angry if they built casino here first, before a hospital. That's what the city really needs. I would have a problem if they could get the casino project going fast, and the hospital is taking a long time. As a citizen of Vaughan, a lack of hospital is my biggest complaint."*

Casino's impact on the City's reputation

- Most men, and to a degree many women agreed that a casino complex in Vaughan – *if done right* – could add character and prestige to the City.
- But *done right* entails a range of elements:
 - Ensuring that the community's safety is not compromised – the city would need to address and manage the concerns (particularly among women) associated with having a casino in "people's backyards"
 - Identifying effective infrastructure solutions to ensure that traffic is not further impeded
 - Some recognize that casinos may still have negative connotations/stigma associated with it – the city will need to address and manage those perceptions
 - Creating a higher-end standard complex (of venues, entertainment, restaurants)
 - (to deter low-income patrons and hopefully crime)

Pros and Cons of having a casino in Toronto vs. GTA/Vaughan

30

Casino in Toronto (+/-)	Casino in Vaughan (+/-)
NOT in my backyard (+)	Revenue, job creation (+)
Lots of existing entertainment choices already (-)	More entertainment choices for citizens (+)
More traffic congestion (-)	Stimulate entertainment development/infrastructure (+)
Access, Parking challenges (-)	Revenue for other developments (+)
Negative impact on existing businesses (-)	Change of social dynamics: entertainment) (+), positive impact on local businesses (+)
Further increase in crime (-)	Closer (+)
Poor city management /wouldn't execute it well (-)	Access (highway, parking) (+)
Inability to have an adult conversation (-)	Effective, efficient city Management/can execute it well (+)
Just a cash grab (-)	Tourism destination, Centerpiece, Enhanced prestige (+)
	Increased crime, unsavory crowds from Toronto/Jane & Finch (-) (esp. women)
	More traffic congestion (-)
	IN my backyard (-) (esp. women)
	Gambling, unethical lending, social/family issues (-)

Thank You

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POLLARA 



Residents' Perspectives on a Casino/Entertainment District in Vaughan

Presented to:

City of Vaughan

August 2012

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Background and Objectives

- City of Vaughan wished to gauge citizens' attitudes toward the idea of building a casino in the City of Vaughan, and toward the various economic and social aspects that such a development would entail.
- Citizens' feedback will play an integral part of any future discussions or debates on the subject.
- A survey instrument was designed to assess citizens' views on the following topics:
 - Incidence and frequency of casino visits
 - Overall impressions and attitudes toward casinos
 - Perceived benefits and drawbacks of casinos in general
 - Suitability of the potential location for a casino/entertainment district in Vaughan
 - Suitability of Vaughan as a potential location for a casino/entertainment district (vs. Toronto or other cities)
 - City's obligation to assess financial and social impact of a casino/entertainment district in Vaughan
 - Level of support/opposition toward a casino/entertainment district in Vaughan
 - Key barriers that would need to be addressed to make citizens comfortable with the concept

Methodology

- Pollara conducted a 12 minute online survey of n=500 residents of Vaughan and its various communities who were 18 years of age or older.
- The survey was conducted between August 10 and 18, 2012.
- The results were weighed by age and gender to 2006 Canada Census proportions to ensure that the results are representative of the opinions of the general public.
- Results are accurate $\pm 4.38\%$ nineteen times out of twenty.

Main Findings and Strategic Considerations

A Note on Demographic Differences in Results

- The big picture: in general, the overall trends in attitudes hold true across demographic segments.
- While some variations between segments do exist, they by no means deviate from the overall patterns in the results.
 - Two more noteworthy* differences: Women and families with children are somewhat more concerned that a casino may compromise the safety of the community, and they are likely to seek more assurance from the City on this front.
 - Also, full-time employees and households without children show somewhat higher* concern about traffic congestion, and they will need the City to address this issue satisfactorily.
 - Overall, however, these groups' attitudes are in line with the rest of the population.
 - All noteworthy differences are noted throughout the report.
- Also note that most findings in the following report are in line with the results from the qualitative phase.

*Statistically significant

Main findings (1 of 3)

- Overall, positive or neutral impressions of casinos outweigh negative ones.
- Most have visited a casino (90%) and their experiences are also largely positive (75% positive). This is true across demographic segments.
- For a majority (78%), casino visits are seen as a entertainment destination, an outing that offers shows, restaurants, nightlife, with gambling being only a part of that experience. Only 22% go there exclusively to gamble.
- In terms of advantages associated with a casino, a majority think of the economic benefits a casino brings: jobs (61%) and revenues for the city (55%) and businesses (54%).
- As for drawbacks, social issues and an increase in traffic congestion are on the minds of nearly seven-in-ten citizens (each), while worries about undesirable populations are mentioned by 61%.
 - Increase in crime rate is relatively low on the radar (35%), although it's higher among families with children (41% vs. 33% among those without).
- There is no consensus as to which of the concerns would be a deal breaker, with voices split across the various potential issues: traffic, social issues, undesirable element/crime (between 21% and 27%)...

Main findings (2 of 3)

- But a majority (59%) agree that benefits of having a casino /entertainment district are too great NOT to consider it, even in light of potential drawbacks.
- The **overall support** toward building an entertainment complex with a casino in Vaughan is stronger than the opposition (55% vs. 34%), although the support skews 'soft' (37% somewhat support, 18% strongly).
- Yet a vast majority (77%) agree (40% strongly) that the City of Vaughan has a financial obligation to assess the financial benefits of such development within the city's boundaries.
 - The attitudes generally hold true across demographic segments, including those who oppose such a development.
- Citizens feel even more strongly about the city's obligation to assess social impact of such development in Vaughan (85% agree, 51% strongly).
- There are three key areas that would need to be addressed in sufficient detail to ease citizens' concerns and build more solid support for the bid:
 - *The City's plan to deal with the potential impact on safety (particularly among women and families with children), increased traffic congestion, and the actual financial benefits to the City and its residents.*

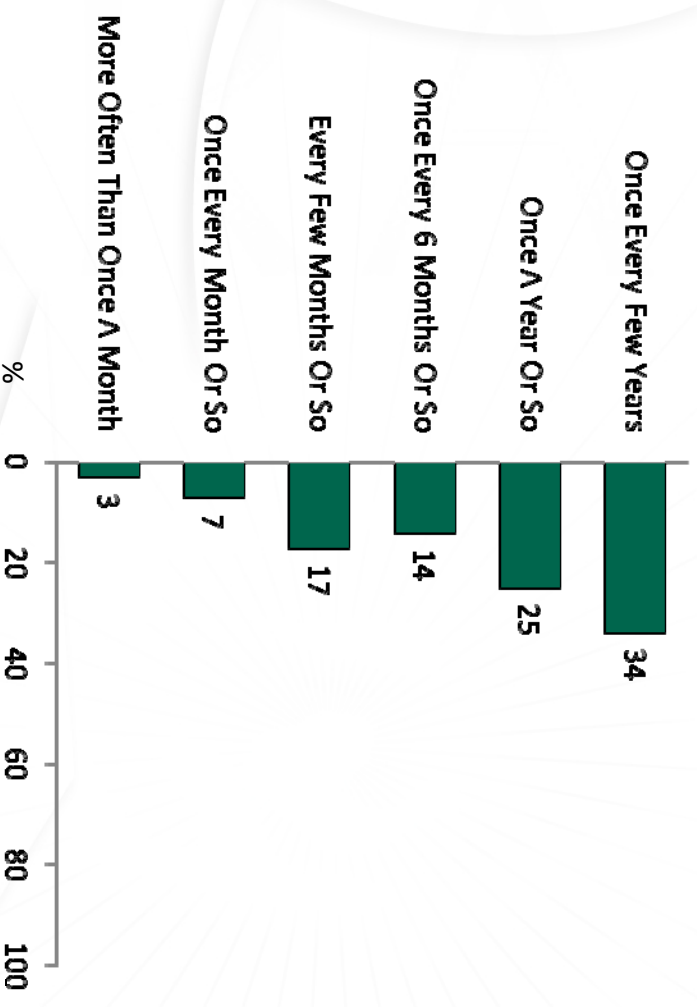
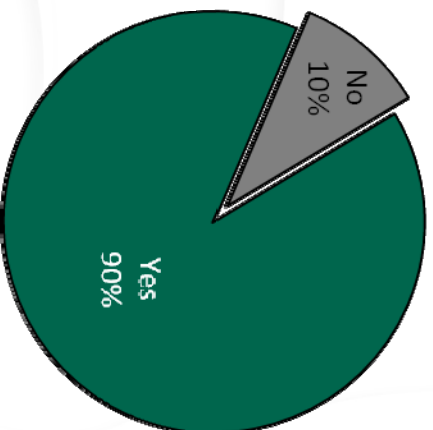
Main findings (3 of 3)

- Over two-thirds (67%) find the proposed site suitable for a casino/entertainment district.
- Most (about a sixth of residents) agree that there are many favourable conditions in Vaughan, making it more suitable than Toronto or other cities in the GTA to have a casino/entertainment district: more real estate space, better access and parking, lower crime, and greater need for more entertainment options.
- But many (about a fourth) are also not sure whether Vaughan is more capable than other cities to effectively collaborate on the project (26% think it can), do it right (31% think it can), or to address potential issues associated with the development (24% think it can).
- *In any future communication with citizens on the casino/entertainment district proposal, it may be beneficial for the City to also develop a communication strategy that not only addresses the City's plans for dealing with these concern areas, but also builds awareness of the City Management's credentials and capabilities to undertake such endeavour.*

Detailed findings

Incidence and frequency of casino visits

- Most respondents (90%) have been to a casino, with a majority (59%) visiting rarely – once a year or less, 31% making occasional visits – every few to every 6 months, and 10% visiting at least once every month. Men and individuals under 35 tend to visit slightly more frequently.



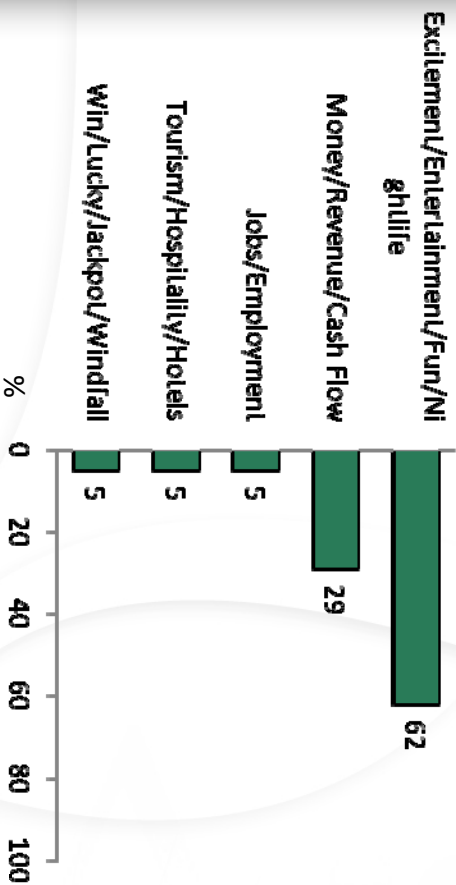
Q4. Have you been to a casino?

Q5. [ASK IF ANSWERED 'YES' IN Q.4] How often do you typically visit casinos? [ALLOW ONE SELECTION]

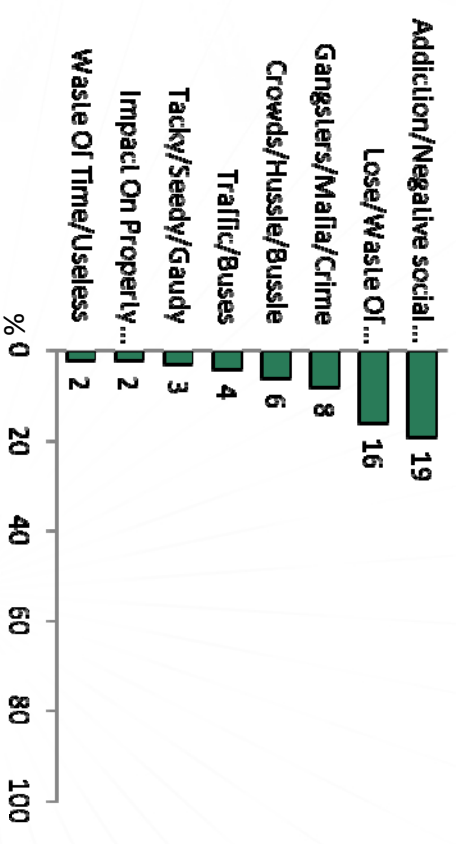
N=500

Top-of-mind perceptions of casinos (visitors and non-visitors)

Positive impressions: 106%

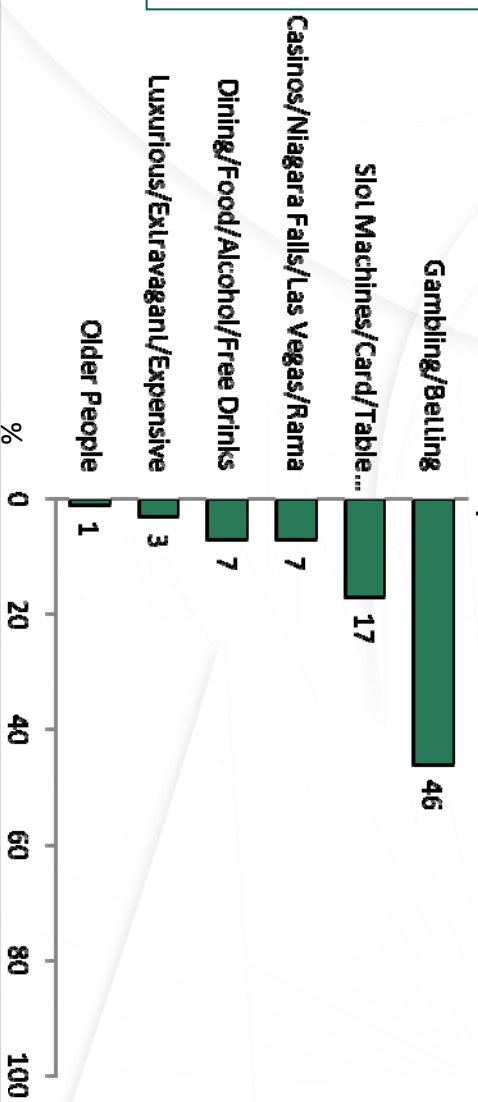


Negative impressions: 60%



Overall, positive and neutral impressions of casinos outweigh negative ones

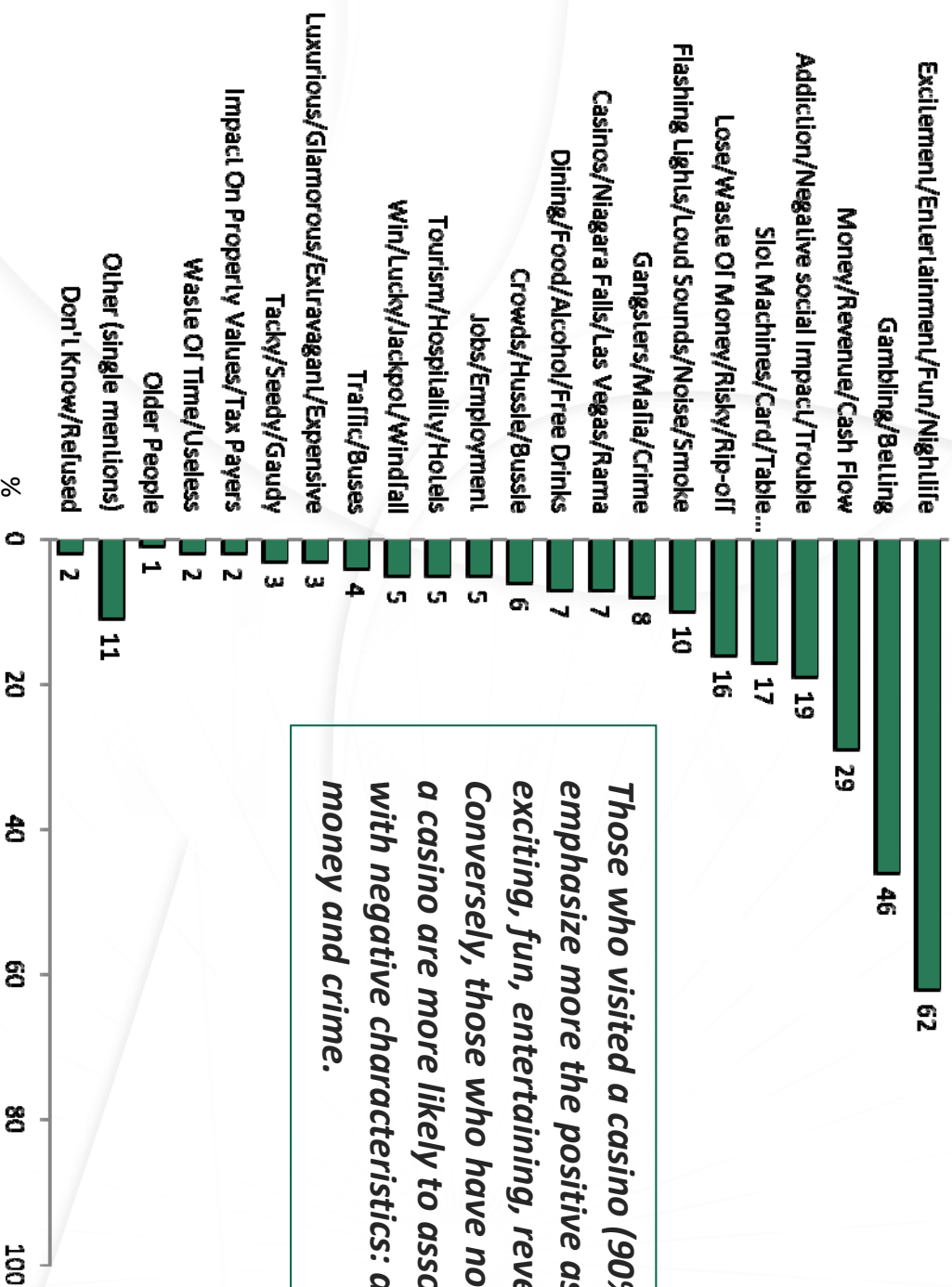
Neutral impressions: 81%



Q3. When you think of the word 'casino', what words or impressions come to mind? Please provide up to 3 impressions, typing each one in a separate text box.
[OPEN-END] [ALLOW UP TO 3 MENTIONS/3 TEXT BOXES]

N=500

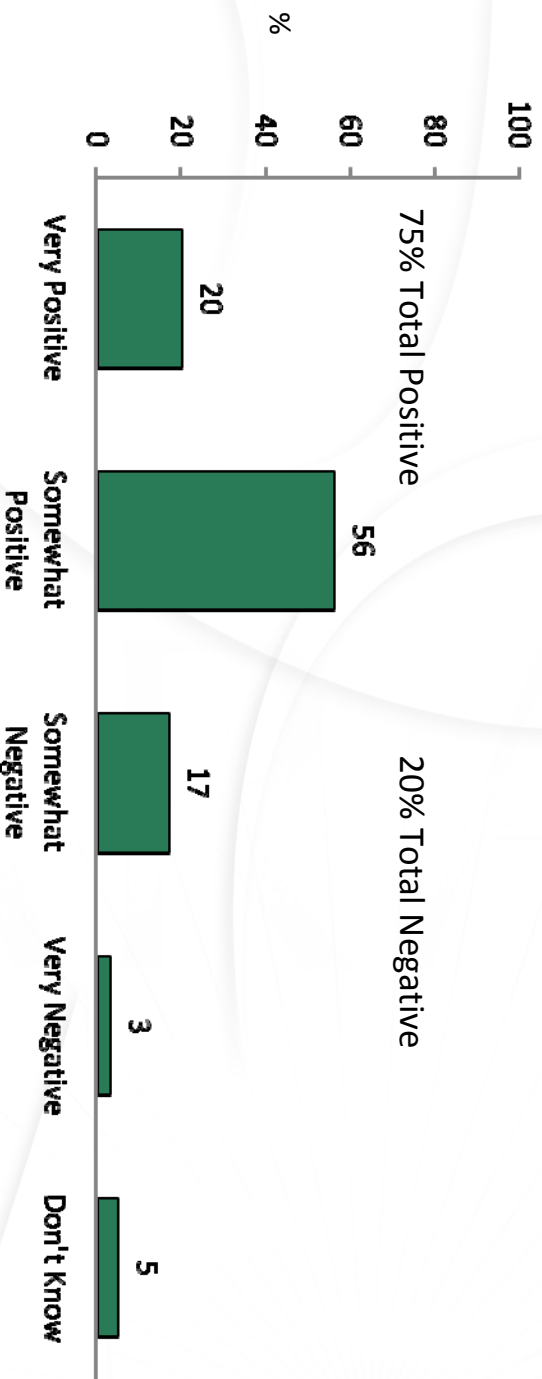
Top-of-mind perceptions of casinos



Q3. When you think of the word 'casino', what words or impressions come to mind? Please provide up to 3 impressions, typing each one in a separate text box.
[OPEN-END] [ALLOW UP TO 3 MENTIONS/3 TEXT BOXES]

Experiences with casino visits

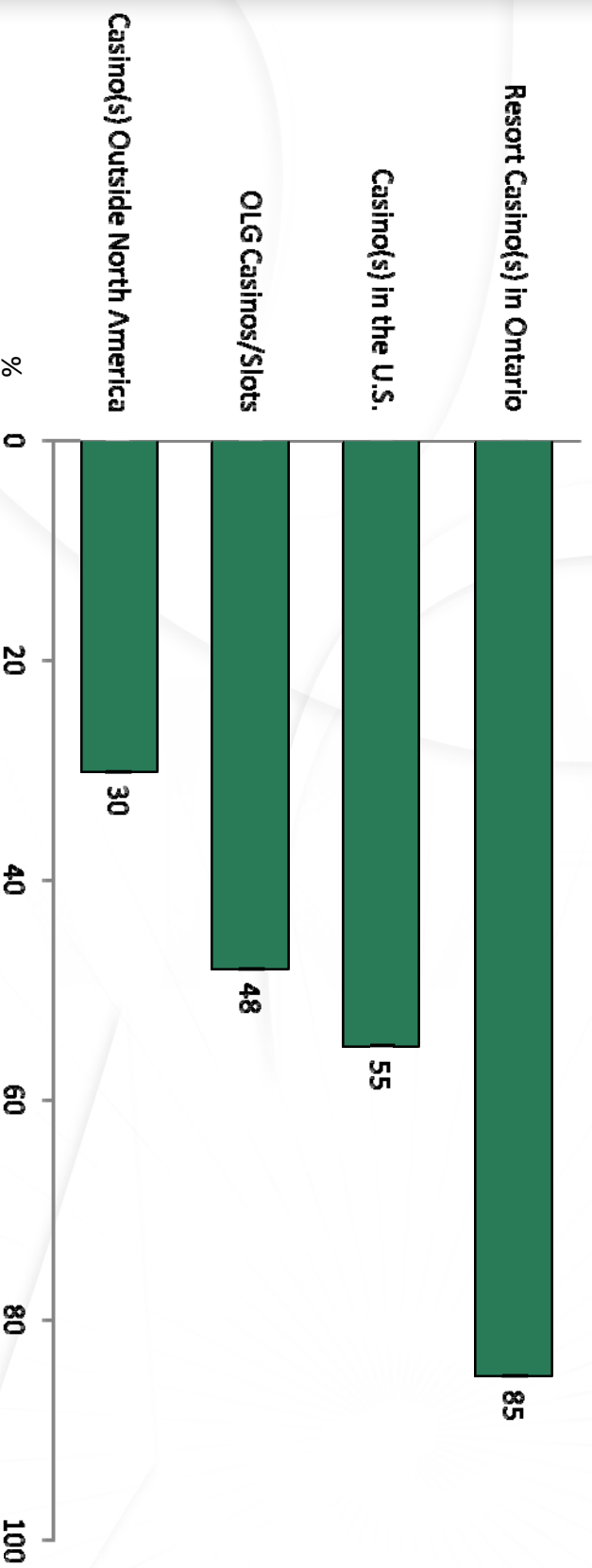
- Reflecting the top-of-mind responses, experiences with casinos are also largely positive across segments.



Q7. [ASK IF HAVE BEEN TO A CASINO] Overall, how would you describe the experiences with your visits to casinos? N=442

Casino locations visited

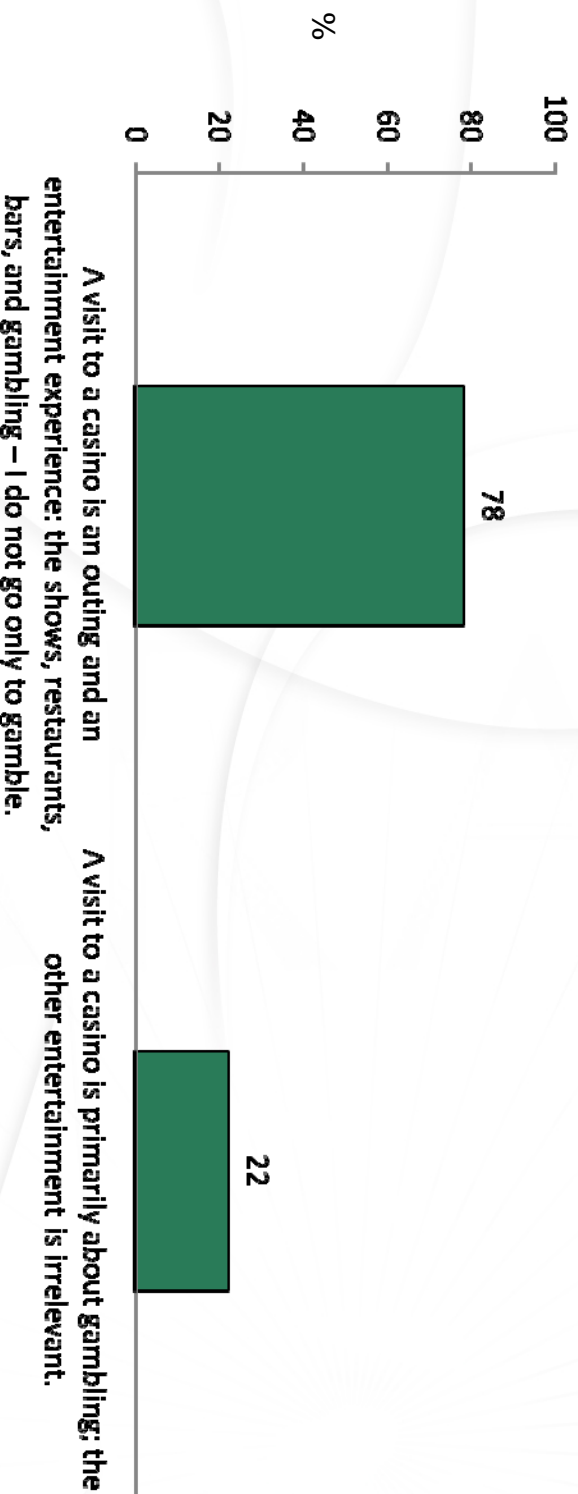
- Local resort casinos (which feature other types of entertainment) are the most preferred option – this finding holds across various demographic segments.



Q6. [ASK IF ANSWERED 'YES' IN Q.4] Which of the following casino locations have you visited? Select all that apply. N=442

Attitudes toward casinos: an entertainment experience

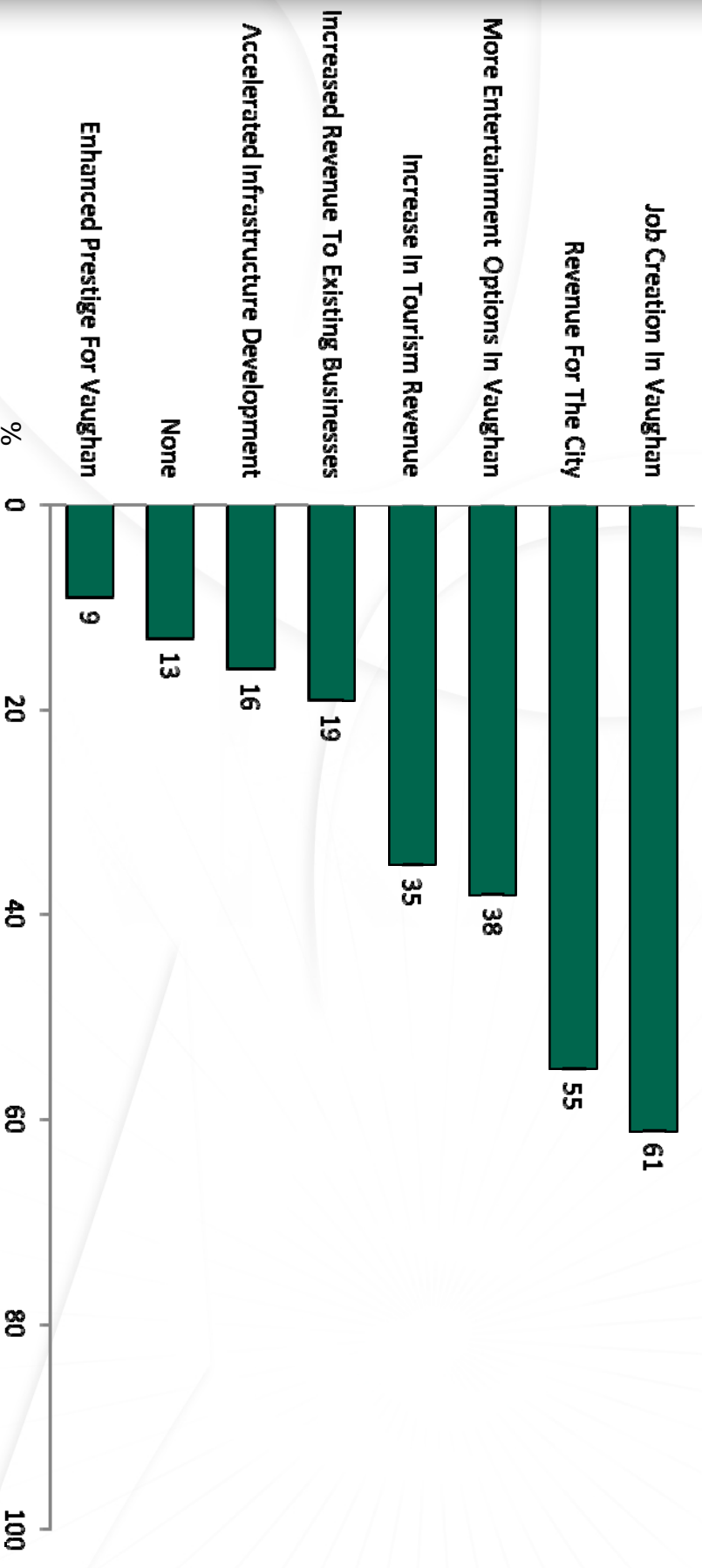
- For a vast majority (78%), casino visits are seen as a entertainment destination, an outing experience that offers shows, restaurants, nightlife, with gambling being only a part of that experience. Again, this attitude is largely true across various segments of the population.



Q8. Which one of the following descriptions best reflects your views of casino visits? [ALLOW ONE SELECTION] N=500

Benefits of casino/entertainment district in Vaughan

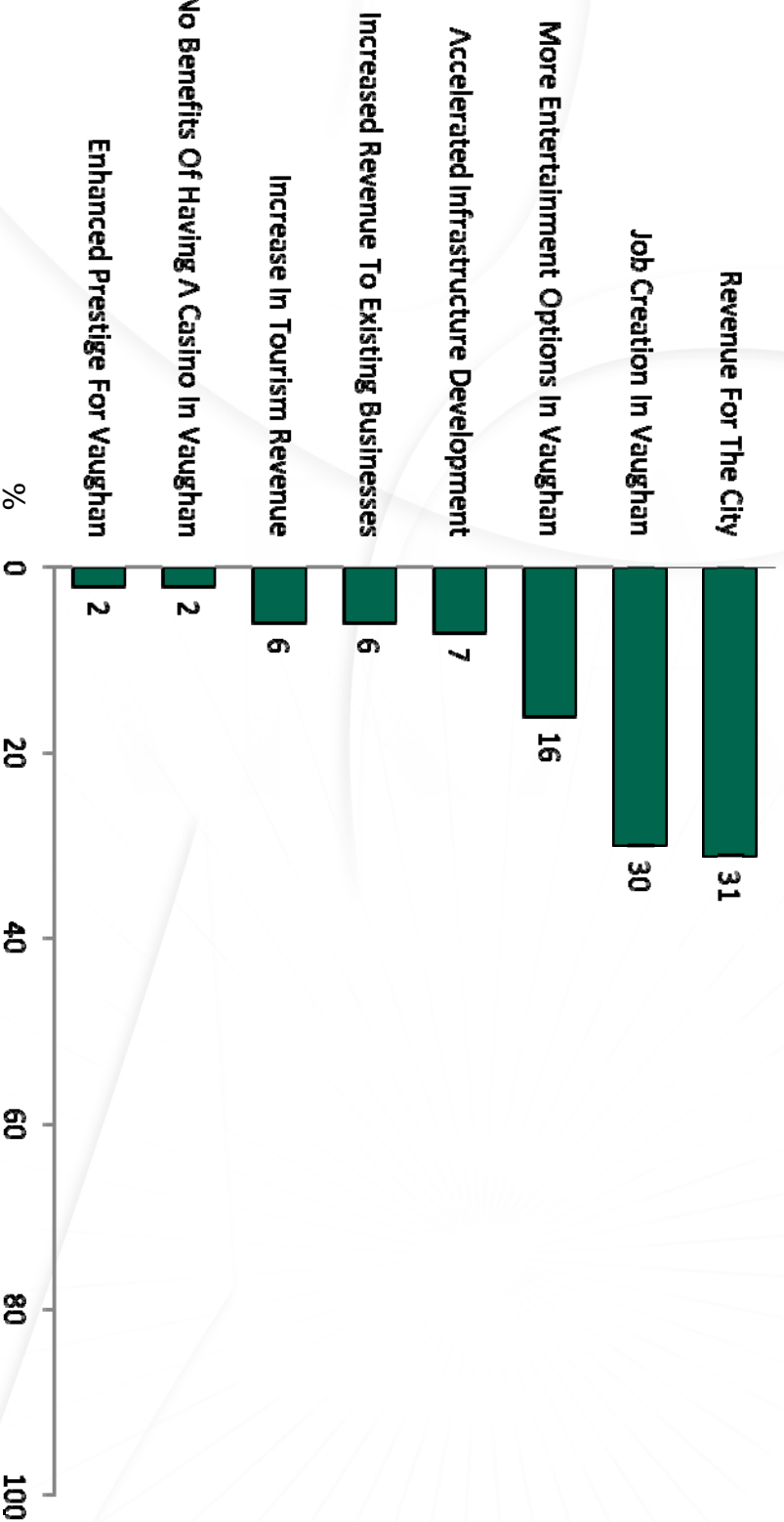
- A majority of respondents focus on the economic benefits associated with a casino/entertainment district in Vaughan: jobs (61%) and revenues (for the city (55%) and businesses (54%)).



Q9. If City of Vaughan was to consider a casino/entertainment district in Vaughan, which three of the following benefits associated with such development would be most important for the City and its residents? [ALLOW 3 ANSWERS] N=500

Key benefit of casino/entertainment district in Vaughan

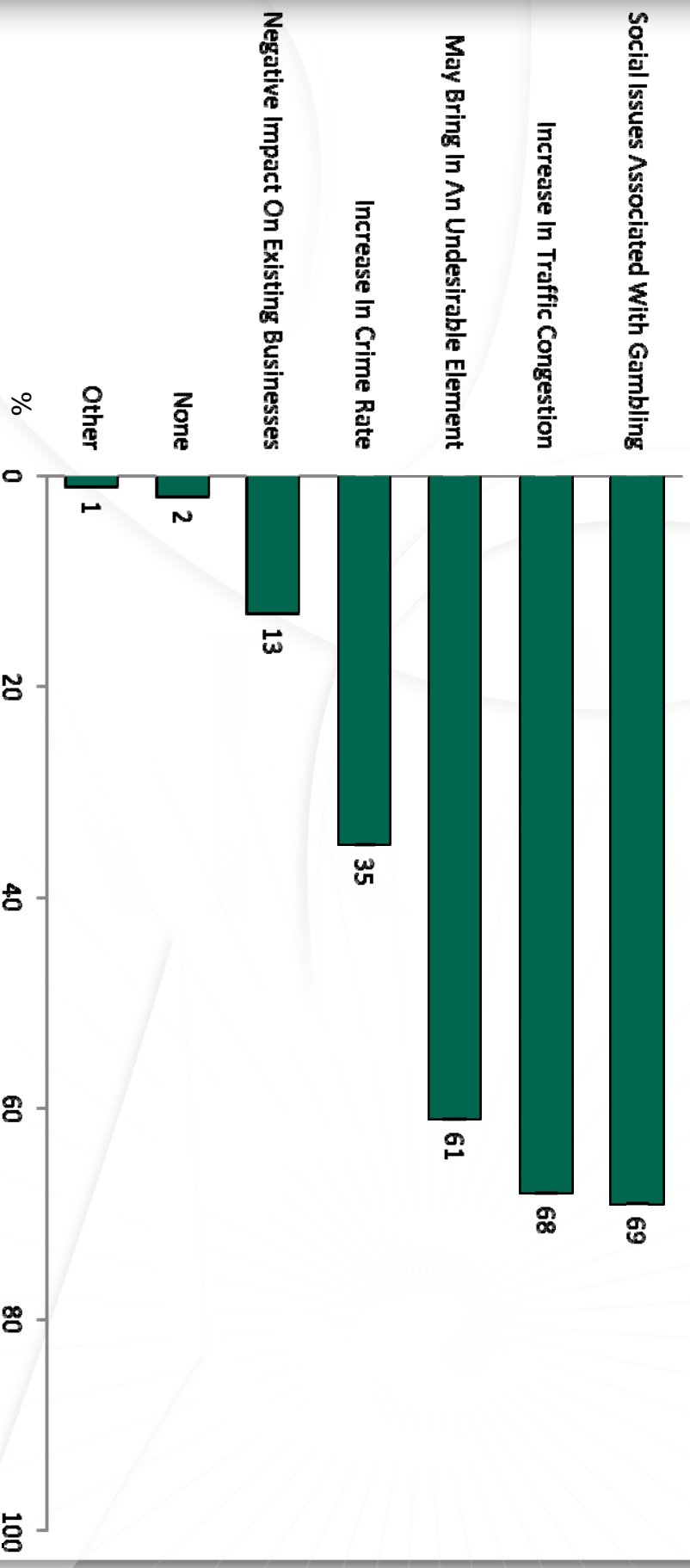
- The key benefit is the economic stimulation associated with a casino/entertainment district: revenue for the city and job creation (30% each).



Q10. And if you were to choose the **one** benefit that would be **most important** for Vaughan, which one would it be? [ALLOW 1 ANSWER] N=436

Drawbacks of casino/entertainment district in Vaughan

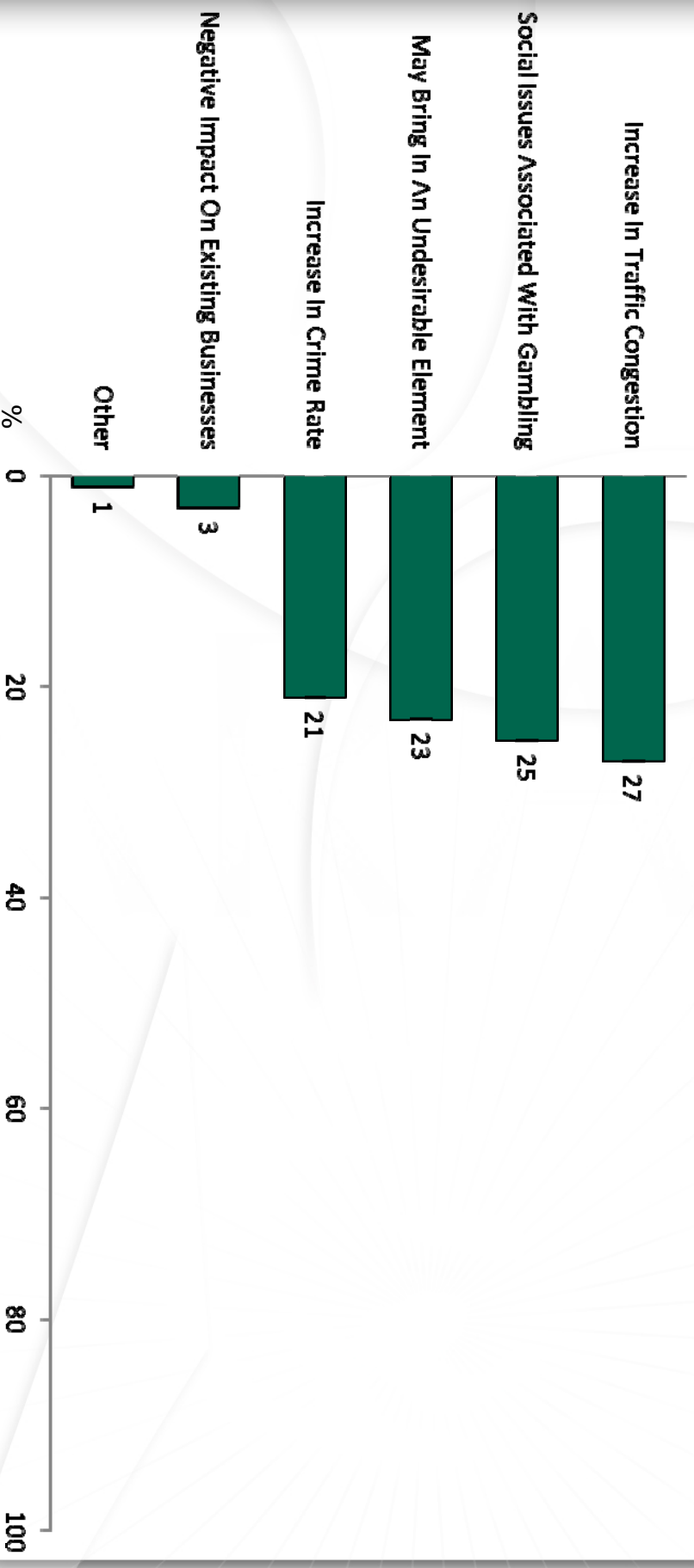
- Social issues and an increase in traffic congestion are on the minds of nearly seven-in-ten citizens (each). Increase in crime rate is relatively low on the radar. These attitudes largely hold true across demographic groups, although crime rate increase is more of a concern among families with children (41% vs. 33% among those without children).



Q11. Which **three** of the following drawbacks would be the key **realistic** concerns you would have with regard to having a casino/entertainment district in Vaughan? N=500

Key drawback (deal breaker) of casino/entertainment district in Vaughan

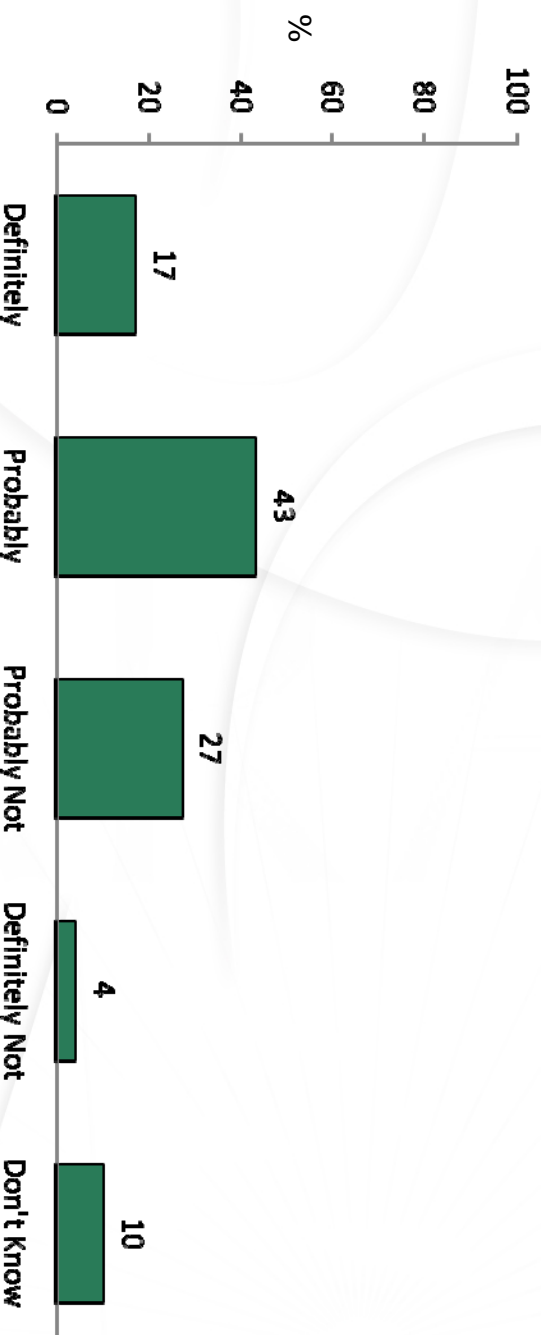
- There is no consensus which of the concerns would be a deal breaker, with voices split across the various potential issues: traffic, social issues, undesirable element/crime (between 21% and 27%)
- Again, increase in crime rate stands out more among households with children (26% vs. 18% for households without children).



Q12. Which concern would be a 'deal breaker': one that should prevent the city from looking into having a casino/entertainment district? N=416

Possibility of alleviating traffic congestion

- Of the 27% who think that increased traffic would be the key concern and a deal breaker, 50% also are of the opinion that it could be prevented by making appropriate infrastructure adjustments, e.g., casino/entertainment district exits and new roads. Another 31% don't believe these measures would help prevent heavier traffic.
- A well devised messaging, outlining the plans for dealing with the potential traffic issue is likely to help ease these concerns.



Q13. [ASK IF ANSWERED 'C' Q.12] If additional casino-only exits were built off the highways and new roads were added to alleviate the casino traffic, would the traffic congestion become less of a concern?

N=115

Views on pros and cons of casino/entertainment district in Vaughan

- A vast majority (79%) believe that problem gamblers will find a way to feed their addiction, with or without a casino, and responsible gamers should not be denied the choice – the onus should be on the individuals to exercise self-control (69%).
- At the same time, 54% believe that not pursuing a casino bid and preserving the city's safe community is worth foregoing the economic benefits. 46% believe that economic benefits are worth the potential risks.

Casinos(..)provide more opportunities for problem gamblers, but problem gamblers will always find a way to feed their dependence.

The majority of the population are responsible gamers and they should not be denied the choice of this type of entertainment to protect problem gamblers from themselves. The onus should be on the individual to exercise self-control or seek help.

Casinos(..)provide more opportunities for crime and other social ills, and not pursuing a casino in Vaughan is the right thing to do to preserve the City's safe and community, even if it means forgoing the economic stimulus and revenue generation.

Casinos(..) provide more opportunities for crime, but potential revenues and other benefits are worth potential risks.

□ Strongly Agree

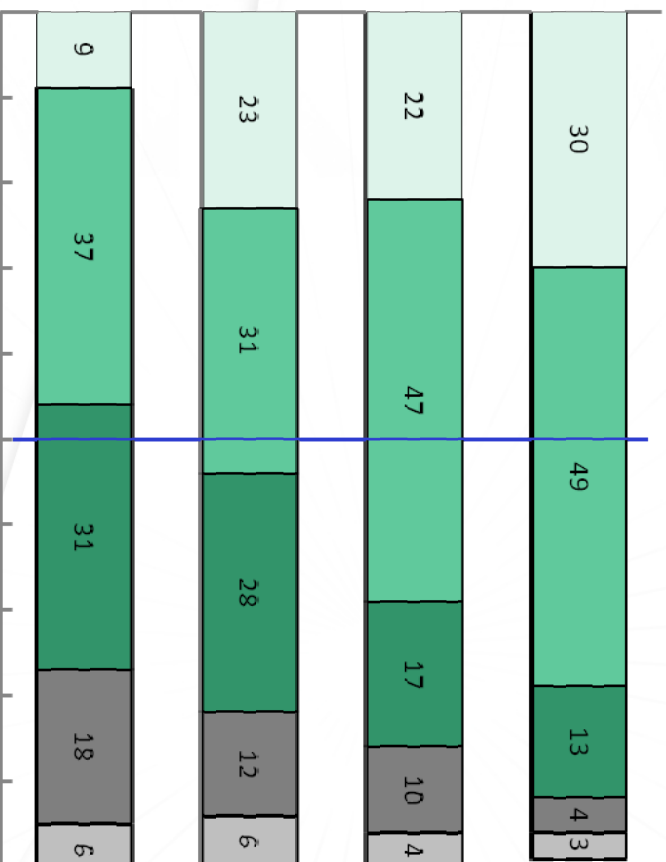
■ Somewhat Agree

■ Somewhat Disagree

■ Strongly Disagree

□ Don't Know

% 0 10 20 30 40 50 60 70 80 90 100

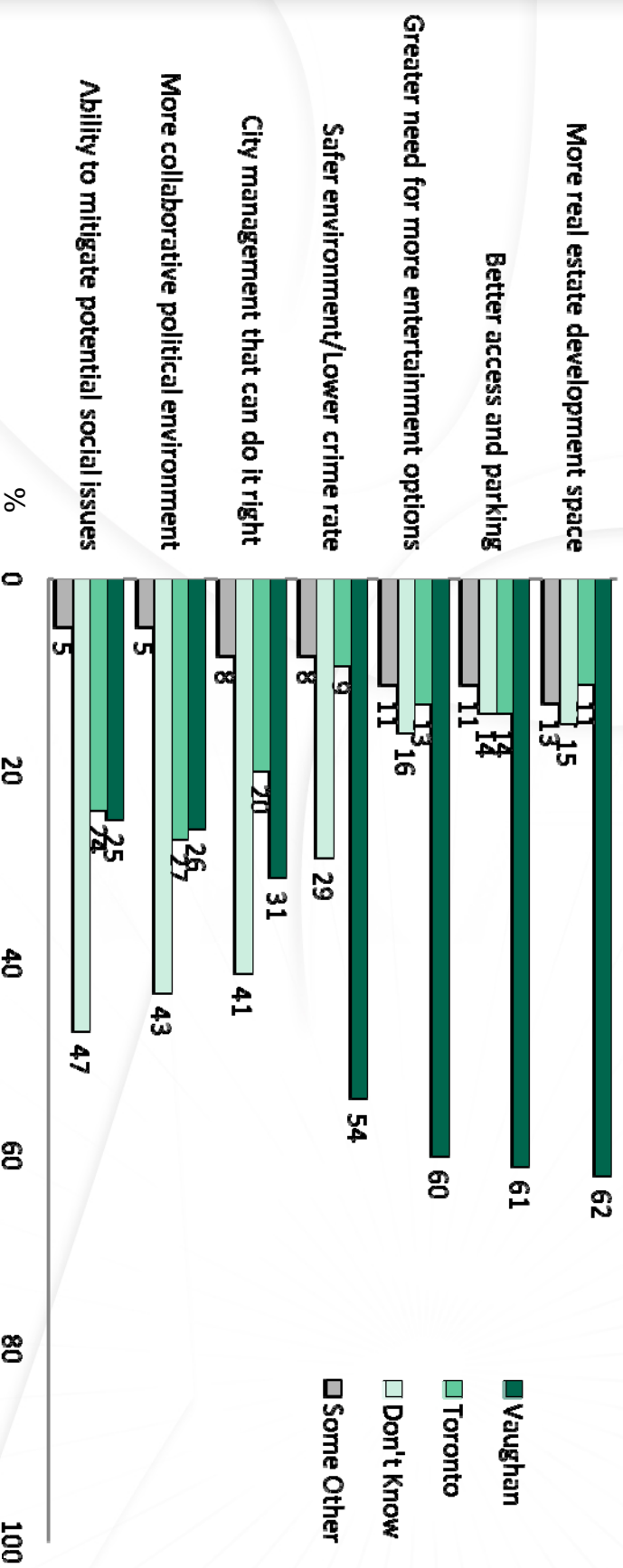


Q14. Again, thinking about the list of pros and cons associated with casino/entertainment district development, how much would you agree or disagree with the following statements

N=500

Location more suited for a casino/entertainment complex: Toronto vs. Vaughan?

- Most (about a sixth of residents) feel that Vaughan has many favourable conditions that make it more suitable than Toronto or other cities in the GTA for a casino/entertainment district development: more real estate space, better access and parking, lower crime, and is in need for more entertainment options.
- But many (about a fourth) are also not sure whether Vaughan is more capable than other cities to have what it takes to work collaboratively and to do it right, or to address potential issues associated with the development.

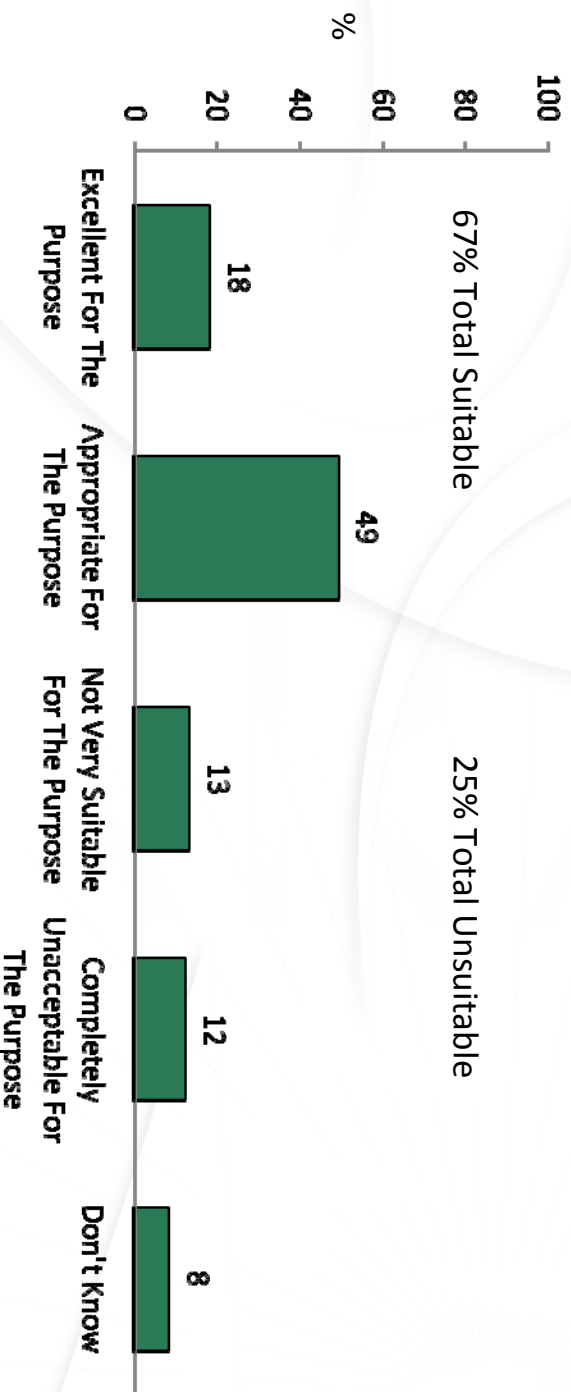


Q15. If the choice of locations for a casino/entertainment district development in the GTA was between Toronto and Vaughan, which of the two cities would be more suited to have such development in terms of... N=500

Reactions to Vaughan Metropolitan Centre as possible location for a casino/entertainment district

MAP SHOWN/EXPLANATION: *A site suitable for a casino/entertainment district development needs to meet a range of criteria: it would need to be economically viable, not too remote, with easy highway access and existing infrastructure in order to attract private investment necessary to develop such a complex. At the same time, the site should not be situated close to residential areas.*

- Over two-thirds find the proposed site suitable for a casino/entertainment district.
 - The preference of the area for a casino/entertainment district is stronger among men (72% vs. 62% women)* and households with children under 18 (70% vs. 65%)*.
 - Frequent and occasional casino goers find this location more suitable (82% and 73%) than those who make such visits rarely (62%)*.

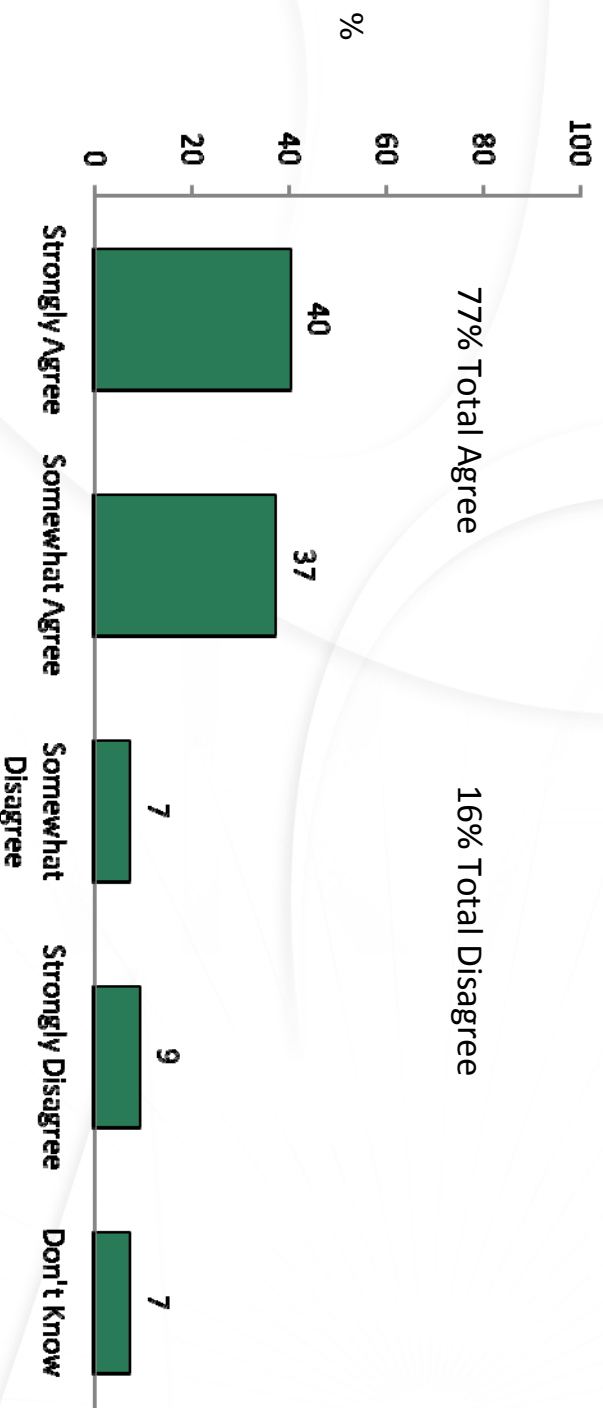


Q16. Keeping those criteria in mind, if City of Vaughan was to consider a casino/entertainment district in the Vaughan Metropolitan Centre, an industrial area close to highway 400 and highway 7; a site that does not boarder with any residential areas, would you consider this location to be... N=500

* Statistically significant differences

City's obligation to assess financial benefits of a casino/entertainment district in Vaughan

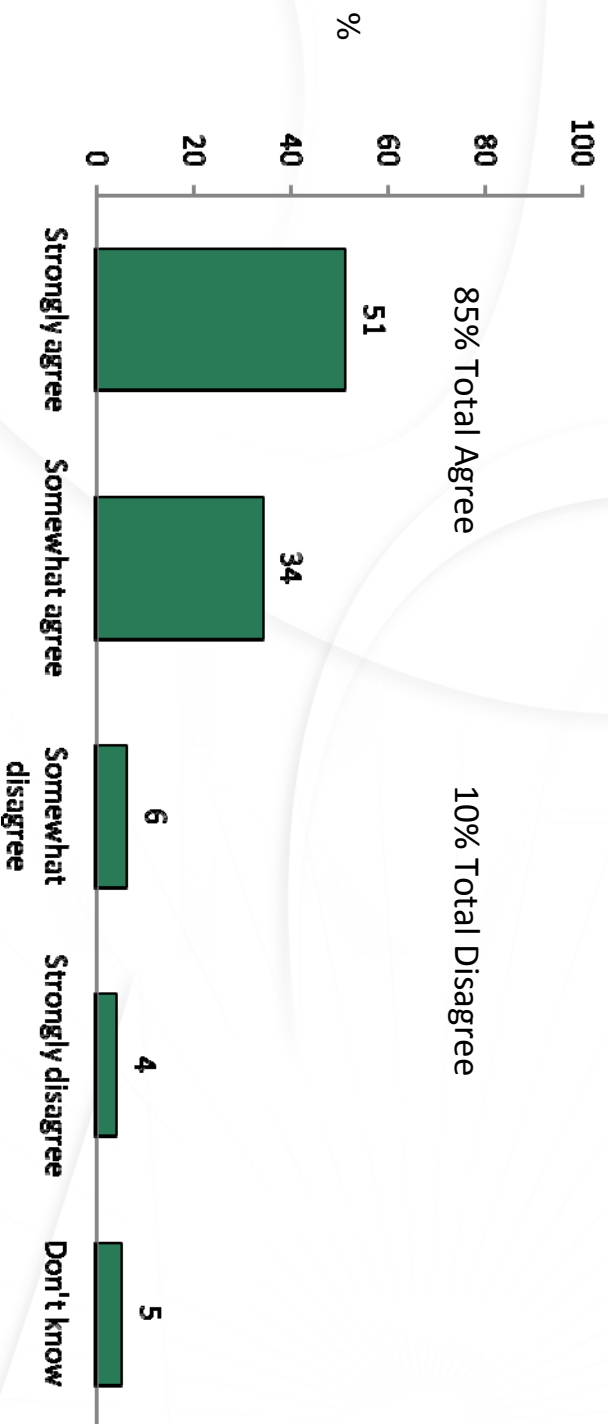
- A vast majority (77%) agree (40% strongly) that the City of Vaughan has a financial obligation to assess the financial benefits of having such a development within the city's boundaries.
- The attitudes generally hold true across demographic segments, including those who oppose such a development (59% agree).



Q17. Would you agree or disagree that city of Vaughan has a financial obligation to its citizens to assess financial benefits of having a casino/entertainment district within its boundaries? N=500

City's obligation to assess social impact of a casino/entertainment district in Vaughan

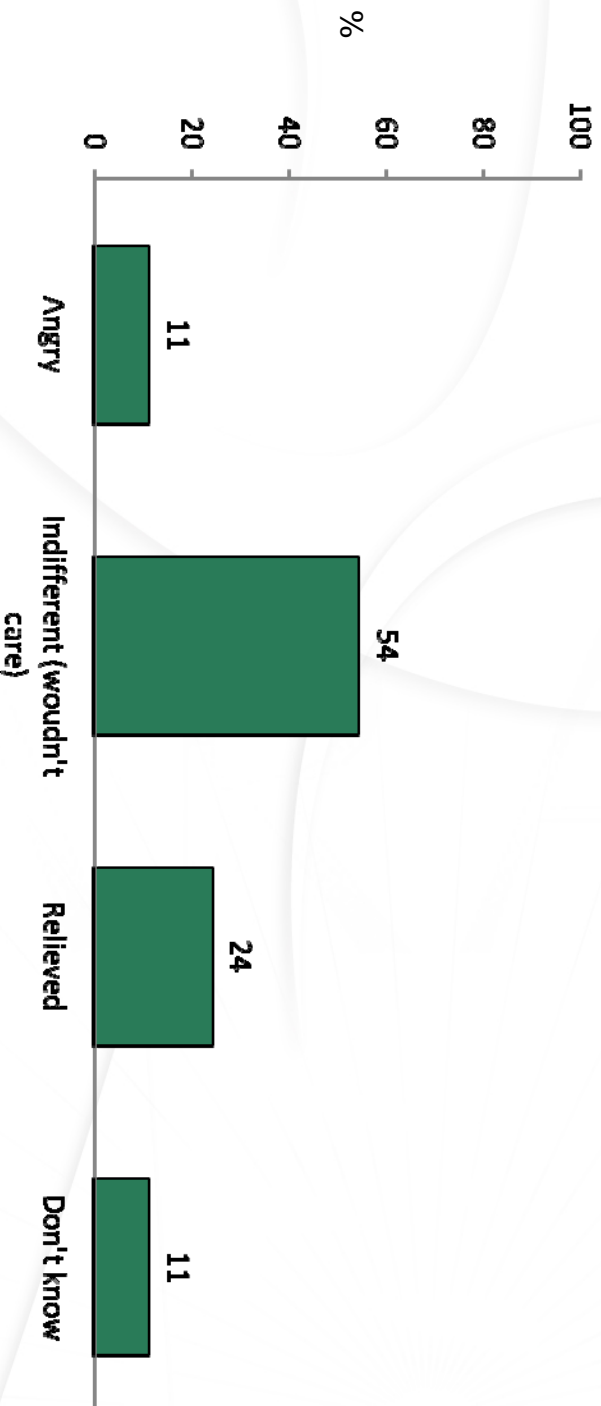
- Citizens feel even more strongly about the city's obligation to assess social impact of such a development in Vaughan (85% agree, 51% strongly).
- Again, this expectation is held across various demographic groups.



Q19. Would you agree or disagree that city of Vaughan has an obligation to its citizens to assess the social impact of having a casino/entertainment district within its boundaries? N=500

Residents' expected reactions to Vaughan's non-participation in a casino bid

- The casino topic does not seem to be an emotionally charged issue for most: 54% would feel indifferent if it was built elsewhere, one-in-ten (11%) would be angry (16% men vs. 6% women*), and just under a quarter of residents (24%) would feel relieved if the city didn't bid on it.

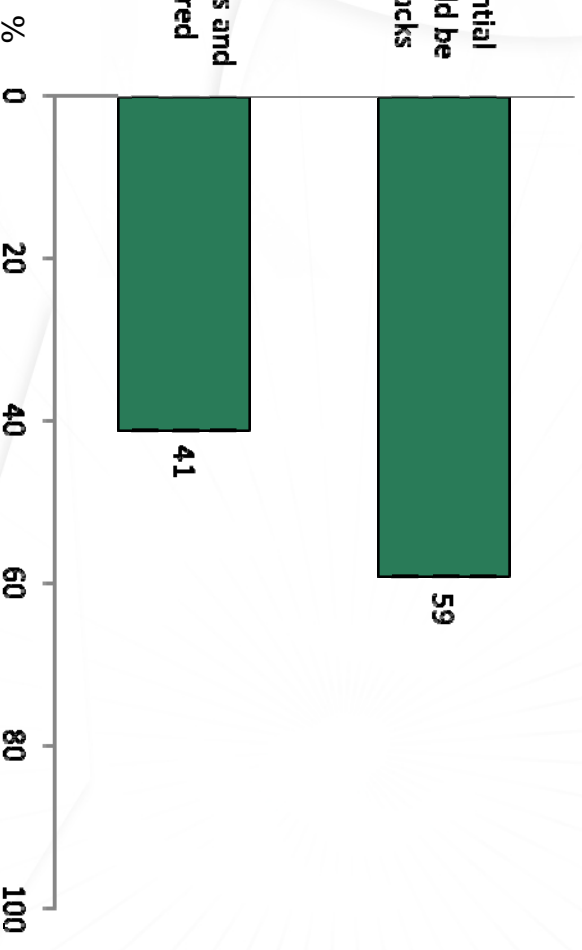


Q18. If Vaughan's neighbouring communities, e.g., City of Mississauga or Markham, were involved in a bid for casino/entertainment district development and City of Vaughan chose not to participate in the bid, how would you feel about that decision? Would you be... N=500

* Statistically significant difference

Benefits vs. Drawbacks – The trade-off residents accept

- But still, a majority (59%) agree that benefits of having a casino/entertainment district are too great NOT to consider it, even in light of potential drawbacks.
- The opposite is true for the other 41% of residents, particularly among those under 35 (48%).

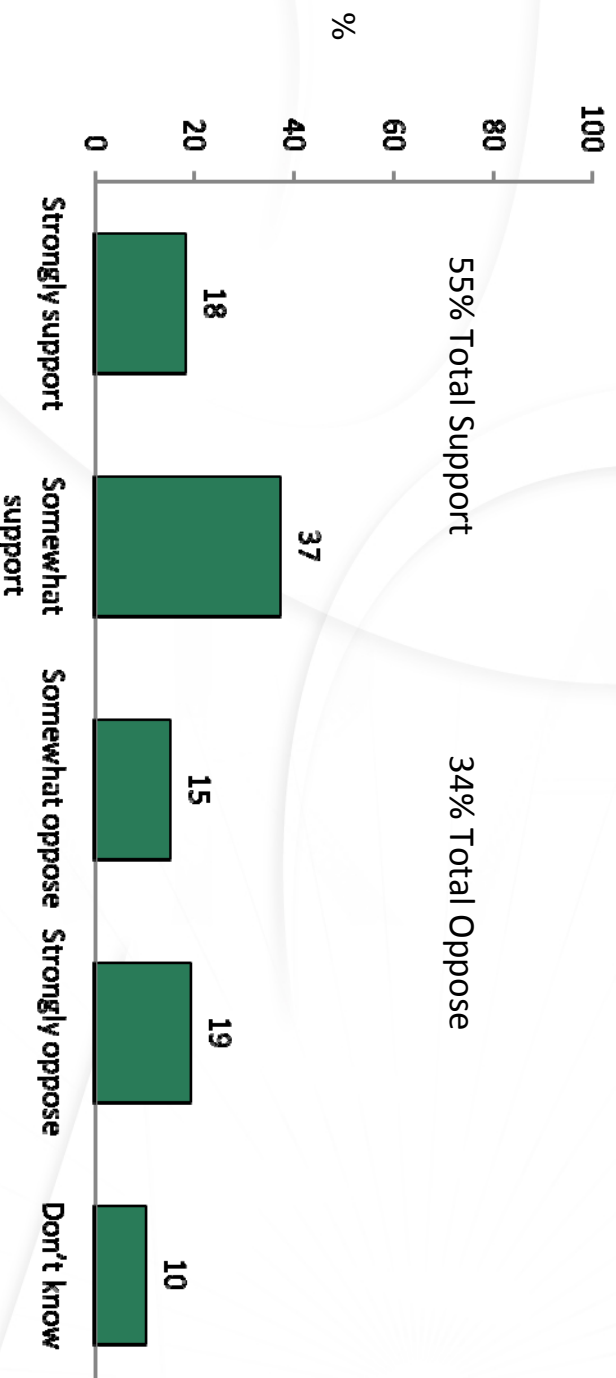


Q20. Given that there are trade-offs associated with a casino/entertainment district, as it has both benefits and drawbacks for the economy and community in which it is built, would you say that...

[ALLOW ONE SELECTION] N=500

Level of support toward an entertainment complex with a casino in Vaughan

- The overall support toward building an entertainment complex with a casino in Vaughan is stronger than the opposition (55% vs. 34%), although the support is mostly 'soft' (37% somewhat support, 18% strongly).
- Support is slightly stronger among men (59% vs. 52% women)
- Support is lower among the under 35 segment (46%), vs. about 60%* for the other age segments.

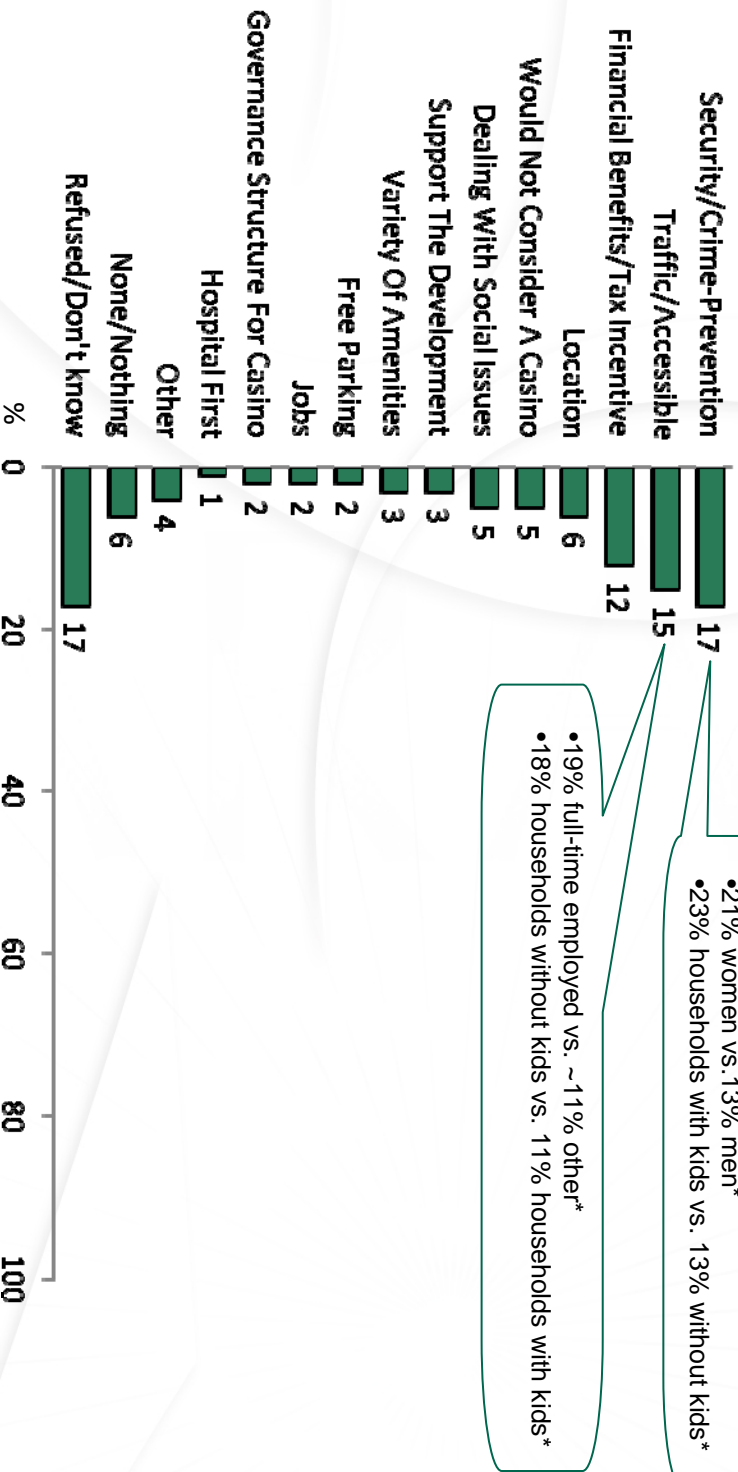


Q21. If a proposal to build an entertainment complex including a casino in the Vaughan Metropolitan Centre was put forward, would you support or oppose such a development? N=500

*Statistically significant difference

Key issues needed addressing to ensure support of the development

- There are three key areas that would require addressing to ease concerns and strengthen support: security, traffic, and financial benefits
 - Security is more important* for women and households with children
 - Traffic is of a particular concern* for citizens working full time and households without children



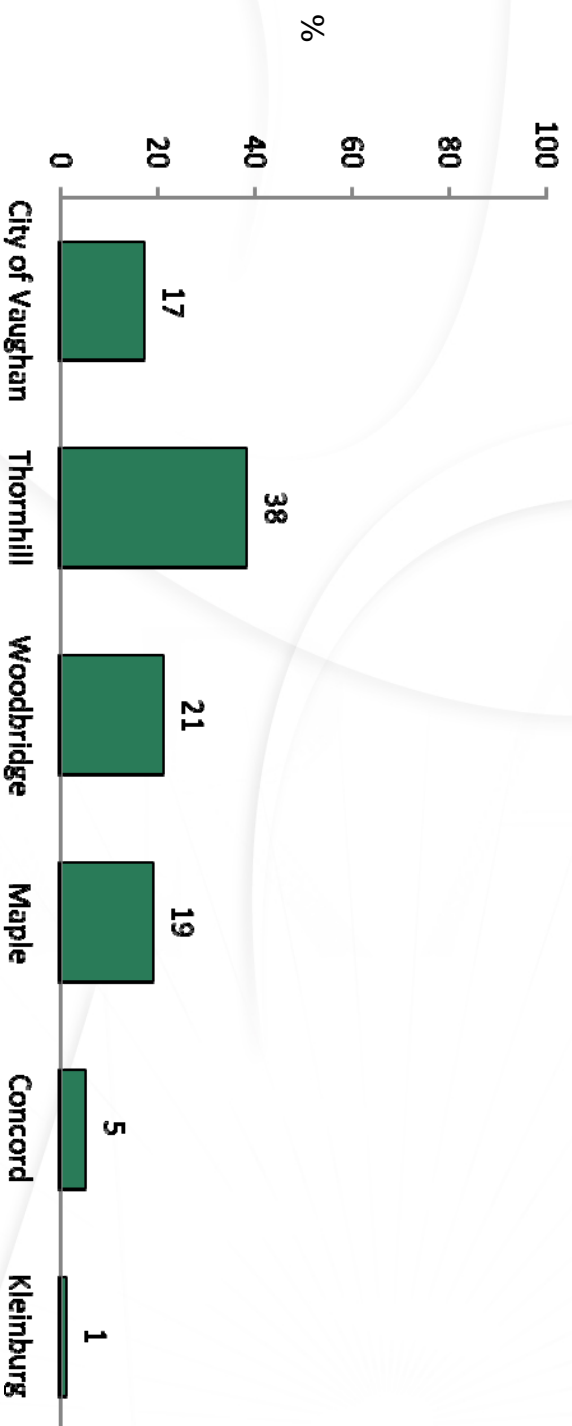
Q22. If City of Vaughan were to consider casino/entertainment district development, what is it that you would need the City to convince you about, to make you comfortable with the idea of such development in Vaughan? [OPEN END] N=500

* Statistically significant differences

Demographic Profile of Respondents

Community

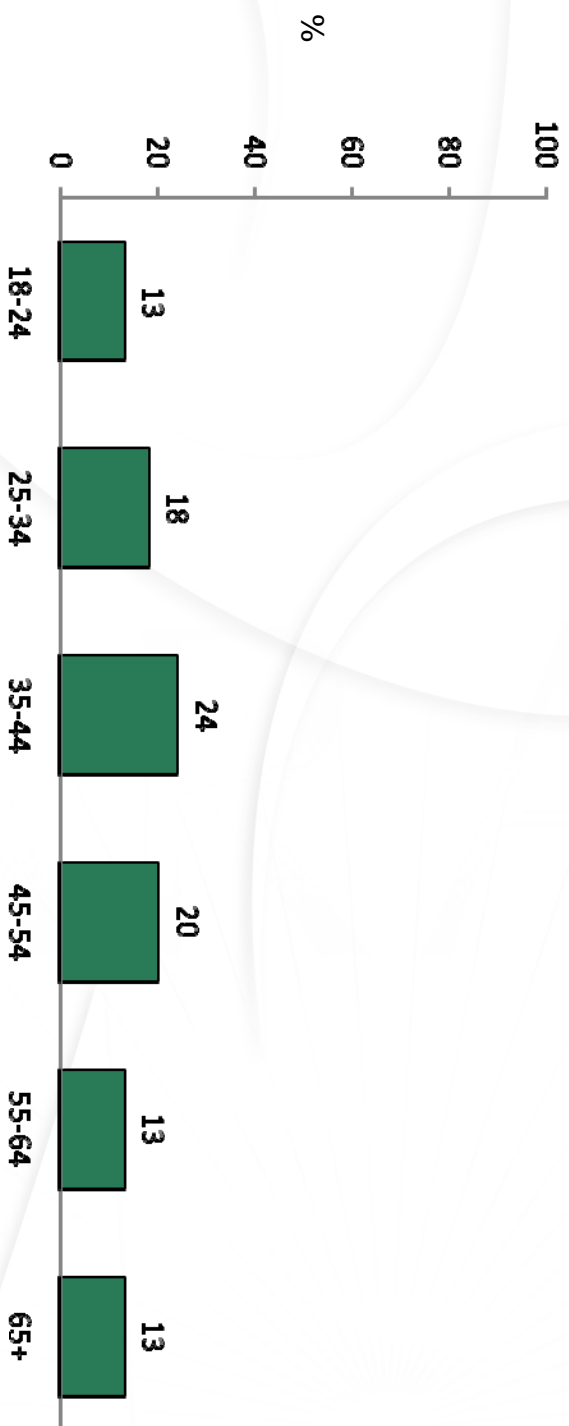
■ Text



Q1. Do you live in the City of Vaughan, or in one of its communities?

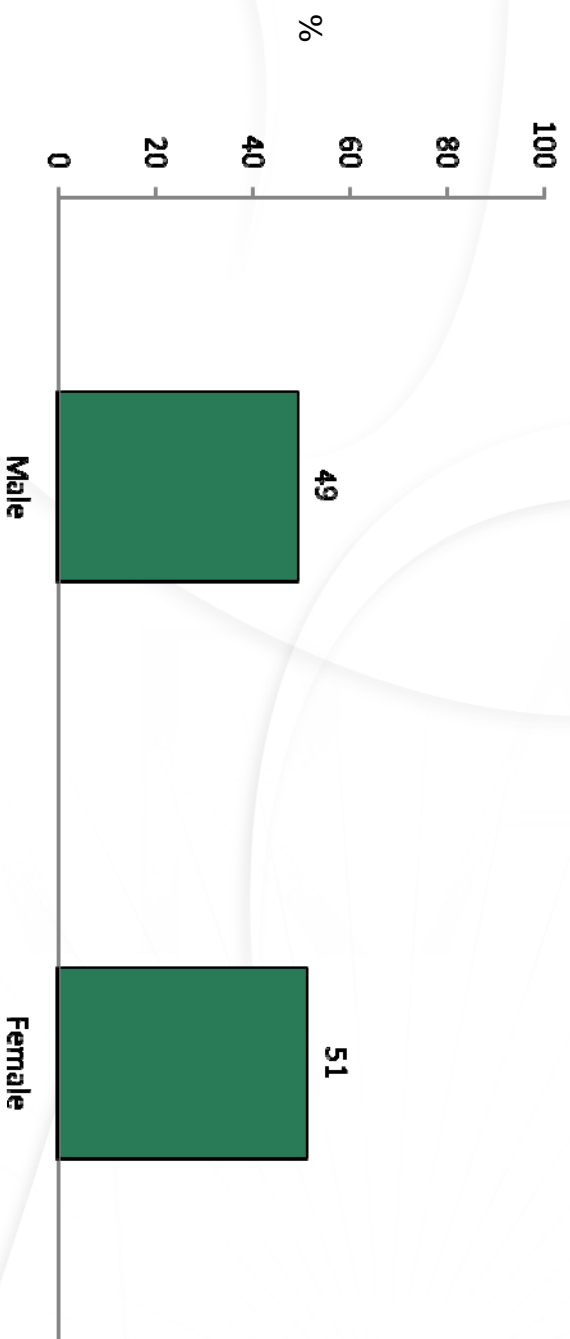
Age

■ Text

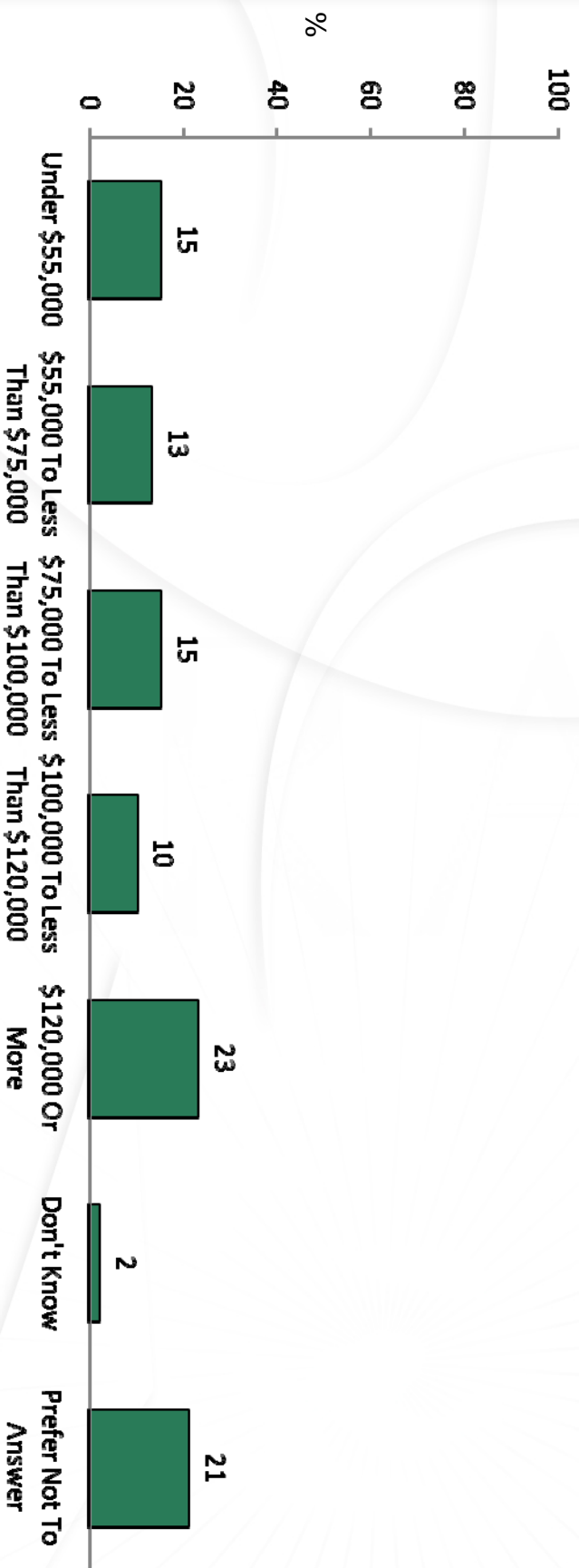


Gender

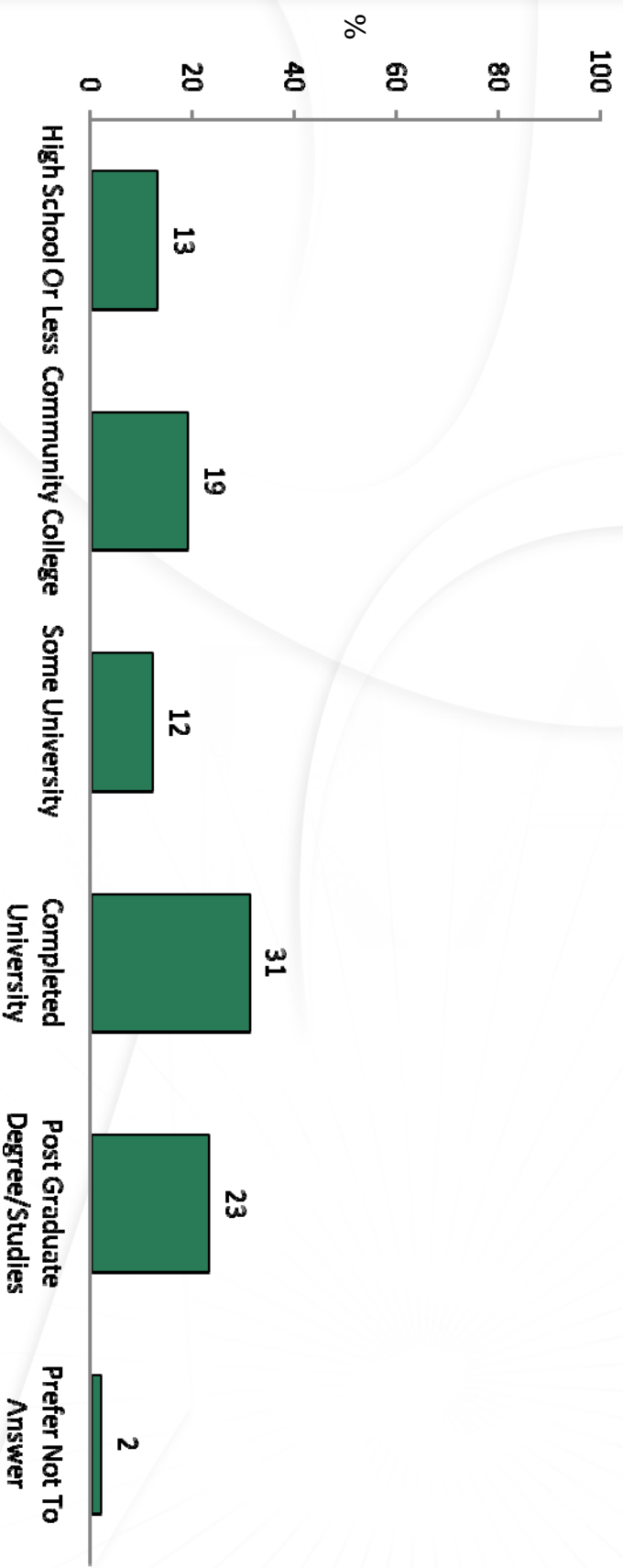
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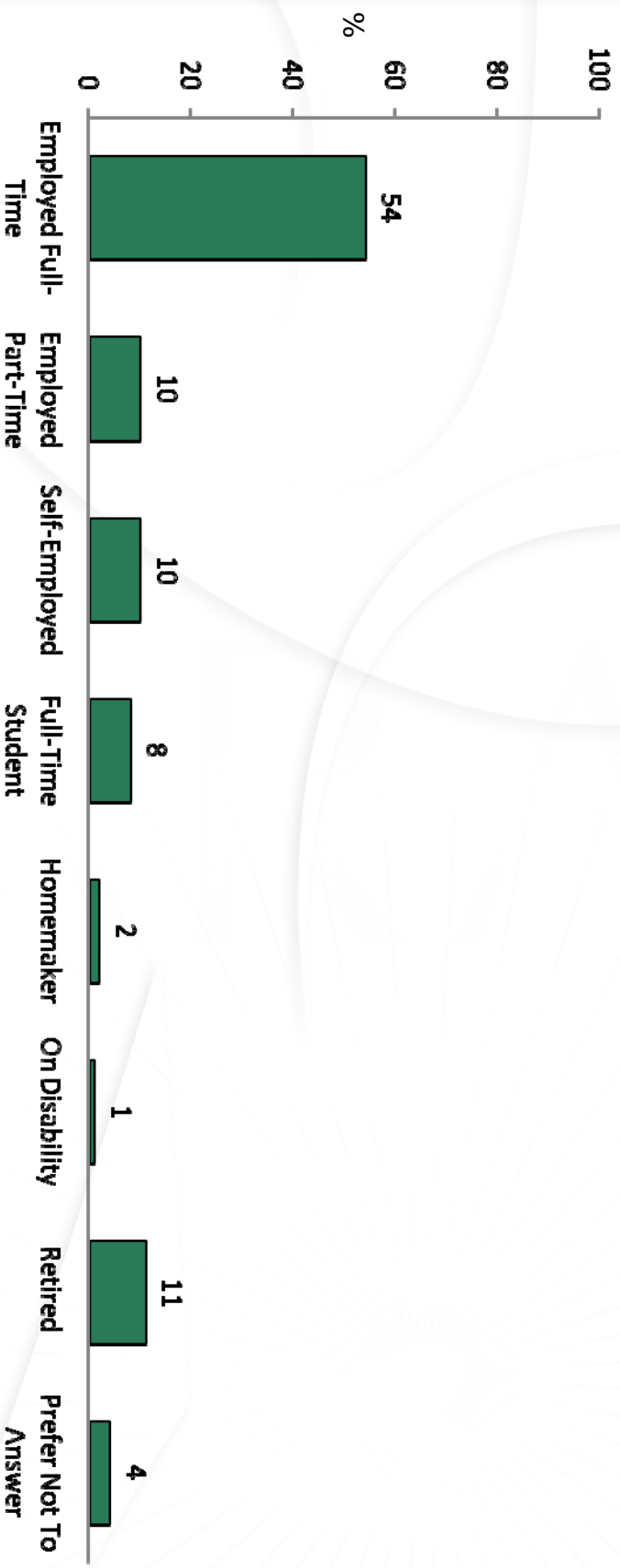
Income



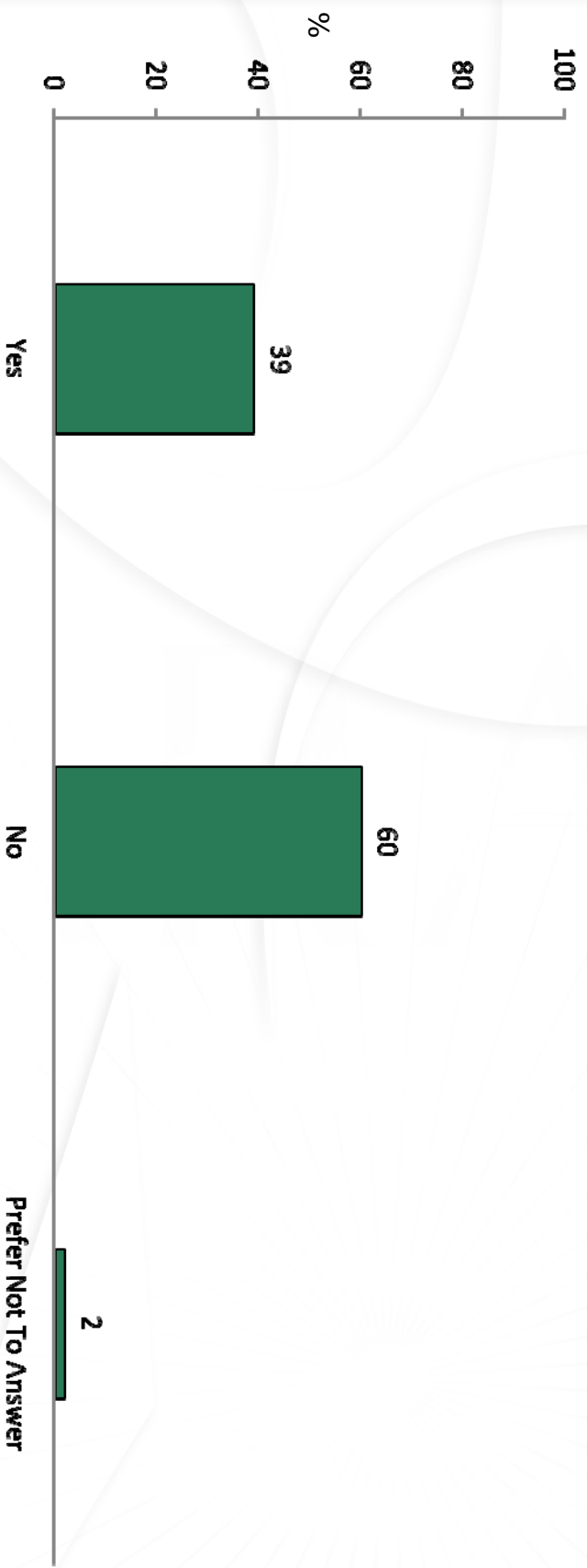
Education



Employment Status



Children under 18 in the Household





Thank You

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