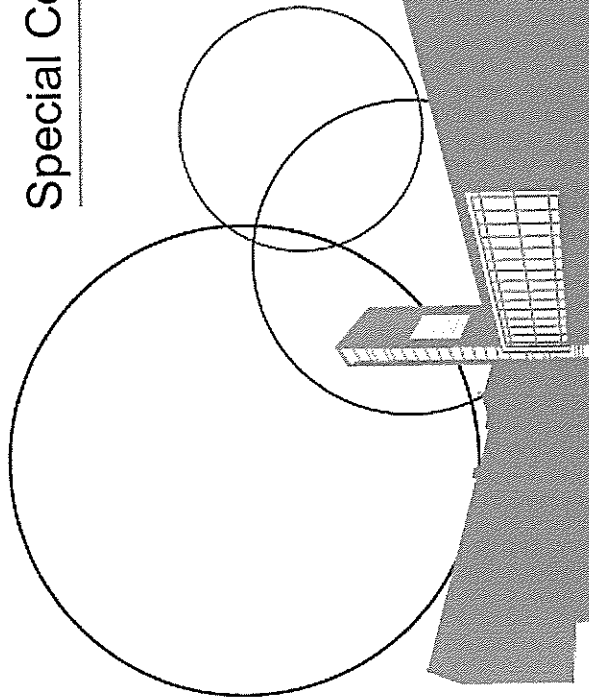


An Integrated Entertainment & Gaming Complex in Vaughan

Special Committee of the Whole Meeting | May 28, 2013

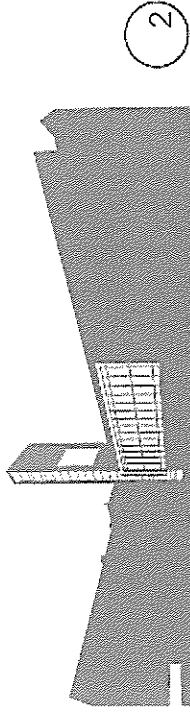


c 10
Communication
SP CW: May 28/13
Item: 1

City of Vaughan

Integrated Entertainment and Gaming Complex

- Overview | Process to Date
- Highlights of Research
- Melbourne – Southbank Precinct
- Financial Sustainability

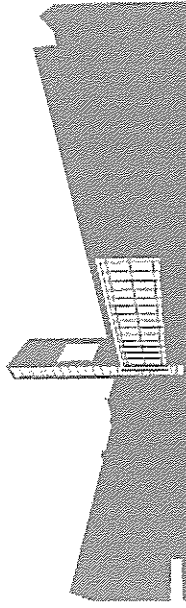


City of Vaughan

Overview | Process To Date

- **June 2012** – Council directs staff to undertake a 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
- **October 2012** – Staff reports back to Council with findings from statistically valid research efforts. The research assessed residents' views about the potential of locating an integrated entertainment and casino complex in Vaughan.
 - Focus Groups
 - On-Line Survey
 - Information Session

Council directed staff to report back to a future session with additional information to support the concept of an integrated entertainment and casino complex

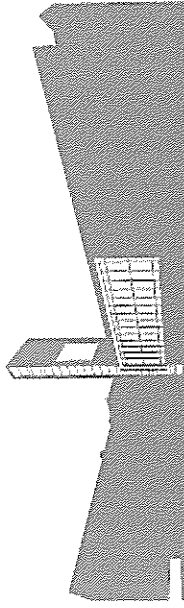


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City of Vaughan

Overview | Process To Date

- **January 2013** – The Staff report identified a number of key considerations for Council to make an informed decision about being a ‘willing’ host municipality for the OLG’s Integrated Entertainment and Gaming Complex, which will be located in the OLG’s C1 Gaming Zone - Vaughan, Markham, Richmond Hill, Mississauga or Toronto. The report included information regarding:
 - Safety/policing
 - Revenue opportunities for the City through a direct hosting fee and annual taxes
 - Job Creation and Capital Investment
 - Entertainment and Tourist potential for Vaughan
 - Potential social impacts

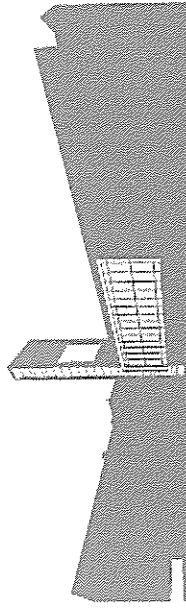


4

City of Vaughan

Overview | Process To Date

- **January 2013** – Following Staff's presentation and a presentation by the Ontario Lottery and Gaming Corporation, Council had a number of questions and comments, and directed staff to gather more information and report back to a Special Committee of the Whole Committee session to present the additional information.

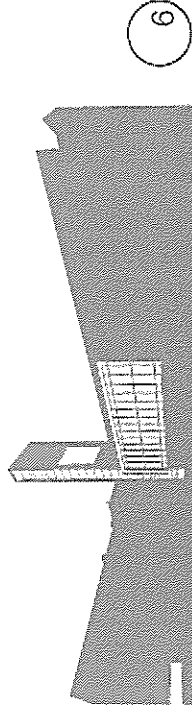


City of Vaughan

Research | Qualitative & Quantitative

Key Findings-

- Positive associations with entertainment – Part of a broader experience
Casino by itself generates little to no interest
- Reactions to a casino in Vaughan mostly positive: potential financial/economic benefits outweigh potential social ills
- Vaughan more suitable for a casino than Toronto (better access, lower crime rate/better safety, more real estate space, greater need for entertainment, more progressive and effective city management)
- Vaughan Metropolitan Centre - ideal for a casino complex

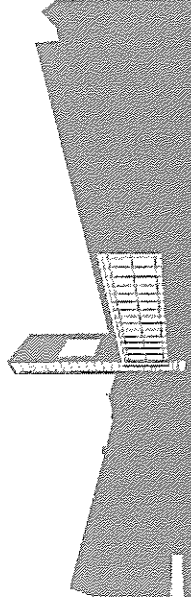


City of Vaughan

Research | Qualitative & Quantitative

Key Findings-

- Potential concerns: intensified traffic congestion
- Potential concerns among women: Jane/Finch proximity/compromised safety
- City expected/obliged to explore the viability of this opportunity from a fiscal standpoint (unanimous agreement).
- Casino must be viewed in the context of other priorities for Vaughan
 - Unacceptable if casino a priority, ahead of a much needed hospital



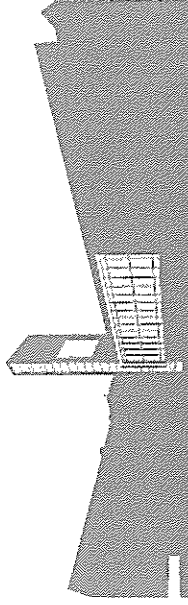
7

City of Vaughan

Research | Qualitative & Quantitative

Key Findings-

- Benefits of casino/entertainment complex in Vaughan – economic stimulation as the dominant driver:
 - Jobs (61%) and revenues for the city (55%) and businesses (54%)
- Drawbacks of a casino/entertainment complex in Vaughan:
 - Social issues (69%), increase in traffic congestion (68%), undesirable element (61%), increase in crime rate relatively low (35%)
- Benefits too great not to consider a casino/entertainment district in Vaughan, even in light of potential drawbacks (59%)
- Support stronger than opposition: 55% vs. 34%



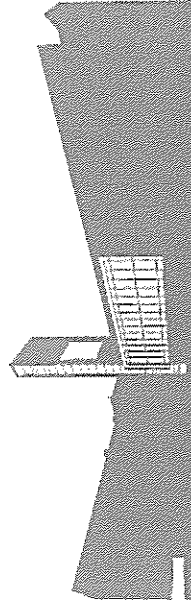
8

City of Vaughan

Research | Qualitative & Quantitative

Key Findings-

- City expected/obligated to assess the economic benefits (77% agree) and the social impact (85% agree) of a casino/entertainment district
- Vaughan more suitable for a casino/entertainment complex than Toronto or other GTA cities
 - More real estate space (62%)
 - Better access and parking (61%)
 - Lower crime (54%)
 - Greater need for more entertainment options (60%)
 - Proposed site seen by 67% as suitable



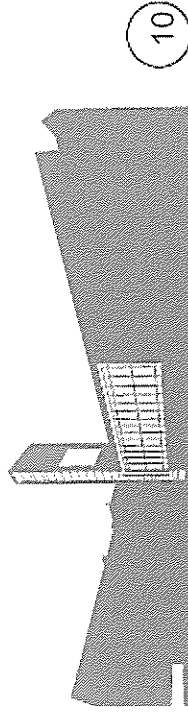
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City of Vaughan

Research | Qualitative & Quantitative

In summary, the residents' views were very clear throughout the consultation process that this is about-

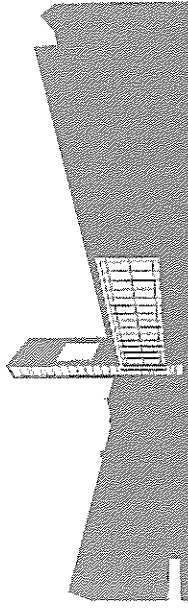
- An opportunity to build an Entertainment & Cultural Destination – Not a Standalone casino – in an appropriate area of the City
- Investment, Jobs and Economic Development
- Providing Tax Relief and Benefits to Residents
- Managing social impacts



City of Vaughan

Making An Informed Decision

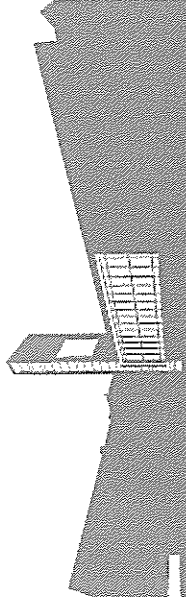
- Additional Information requested by Council focused around the following:
 - Is there a comparable location in Canada/North America or some other location that could be used as an example?
 - Impact on the recruitment of Office Tenants & Residential Development
 - How would this complex affect local business and land value?
 - Does this complex fit with the City's vision for the VMC or another location in the City?
 - Are the Landowners open to this type of investment?
 - What opportunities could the City capitalize on with additional non-taxation revenue?
 - What terms and conditions would Staff recommend to the OLG to be a host municipality?



City of Vaughan

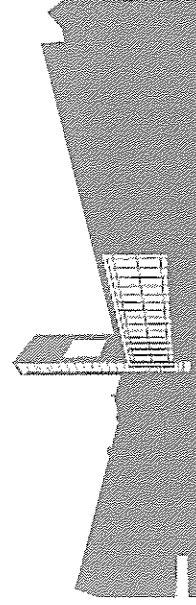
Making An Informed Decision

- In addition to traditional research, staff consulted with leading professionals in the Gaming/Hospitality and Commercial Real Estate Sector, Office Sector, Architecture and Urban Planning to gain as much insight as possible. All noted that the gaming industry outside of Las Vegas and Atlantic City is a relatively new economic employment sector to cities across North America.
- A few of the cities in North America that now have a gaming presence include: Cincinnati, Cleveland, Pittsburgh, St. Louis, Montreal, Detroit, New Orleans, Calgary, Edmonton, Halifax. Around the world cities such as London, Melbourne, Singapore, Moscow, and Paris all have casino and gaming facilities.



12

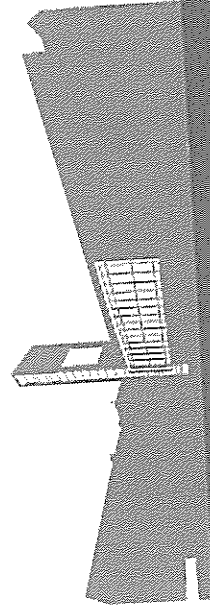
City of Vaughan Making An Informed Decision | OLG C1 Gaming Zone



13

City of Vaughan Making An Informed Decision

Is there a comparable location in Canada/North America or some other location that could be used as an example?



14

City of Vaughan

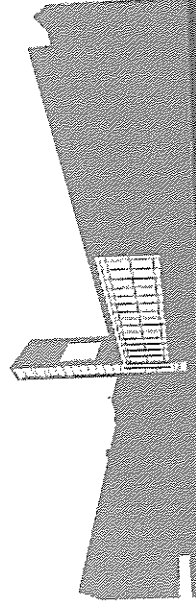
Making An Informed Decision | Melbourne, Australia

The Crown Integrated Complex in Melbourne

The complex is located in the Southbank Precinct of the City of Melbourne. Southbank's central claim to fame is an Arts, Cultural and Leisure Precinct, including retail, residential, eating, office, casino and other entertainment. It is a high growth area of the City.

Southbank and the Vaughan Metropolitan Centre

The Southbank Precinct (400 acres) is an excellent 'real world' example of how an integrated entertainment and casino complex could exist in the VMC (442 acres) and provides insight into many of the questions that Council requested more information on, such as the impact on residential development and office development and the integration into the 'fabric' of the area.



City of Vaughan

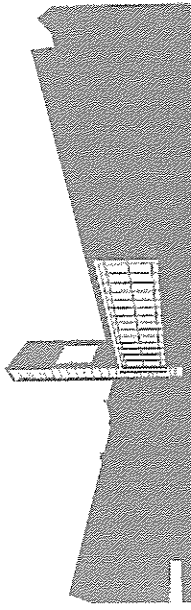
Making An Informed Decision | Melbourne, Australia

- **The Crown Melbourne Integrated Resort**

The Complex is a leading International Class luxury resort featuring more than 1,600 hotel rooms and VIP villas, spas, swimming pools, high-end retail shopping, signature restaurants, a convention centre, gaming areas and live entertainment venues.

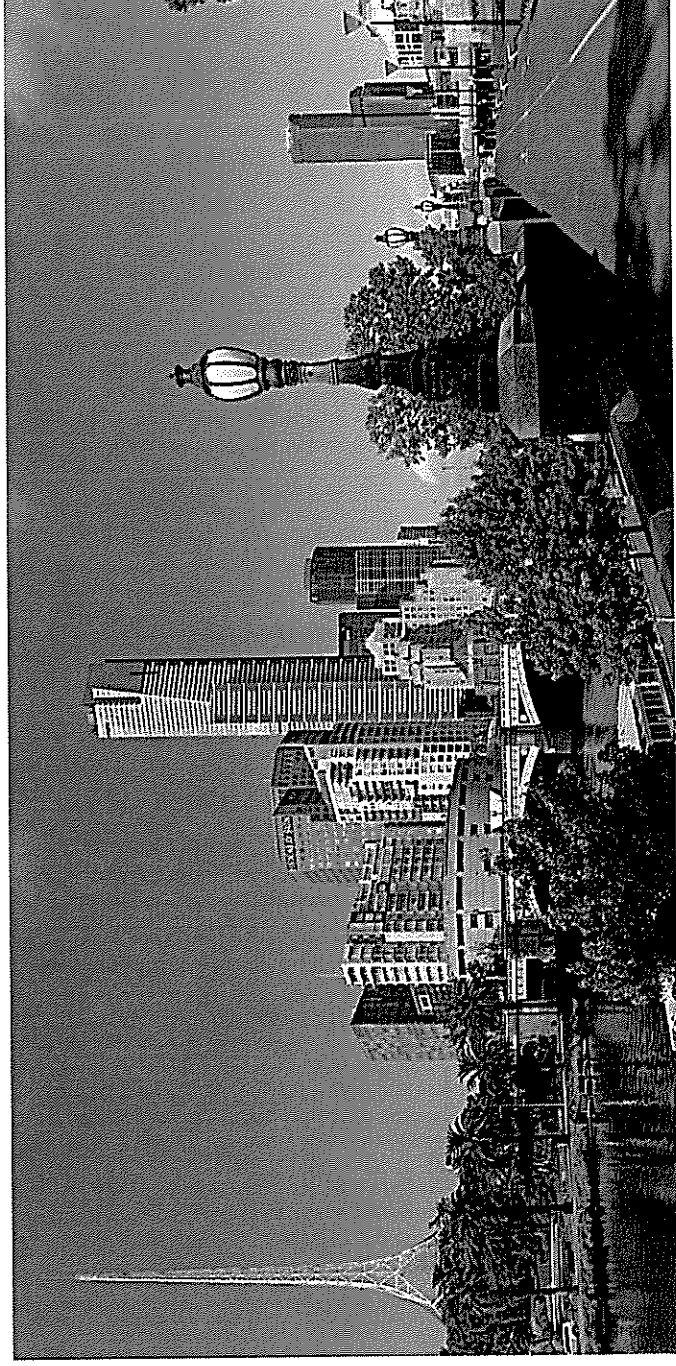
More than 18-million visitors walk through the Complex's doors annually, making it one of Australia's most visited tourist attractions. KPMG estimated that Crown contributed approximately \$1.5 billion to value-added in the Victorian economy annually.

Crown operates Victoria's largest single-site workforce from the Complex. In 2012, more than 8,850 people came to work at the Complex, with Crown's direct workforce numbered at 6,686 positions, which includes full-time, part-time and casual employees.

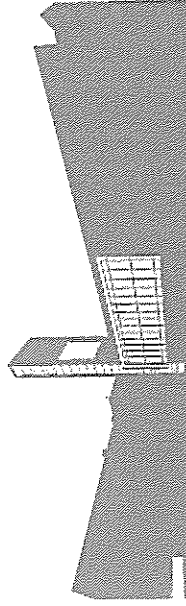


16

City of Vaughan Making An Informed Decision | Southbank Precinct - Images

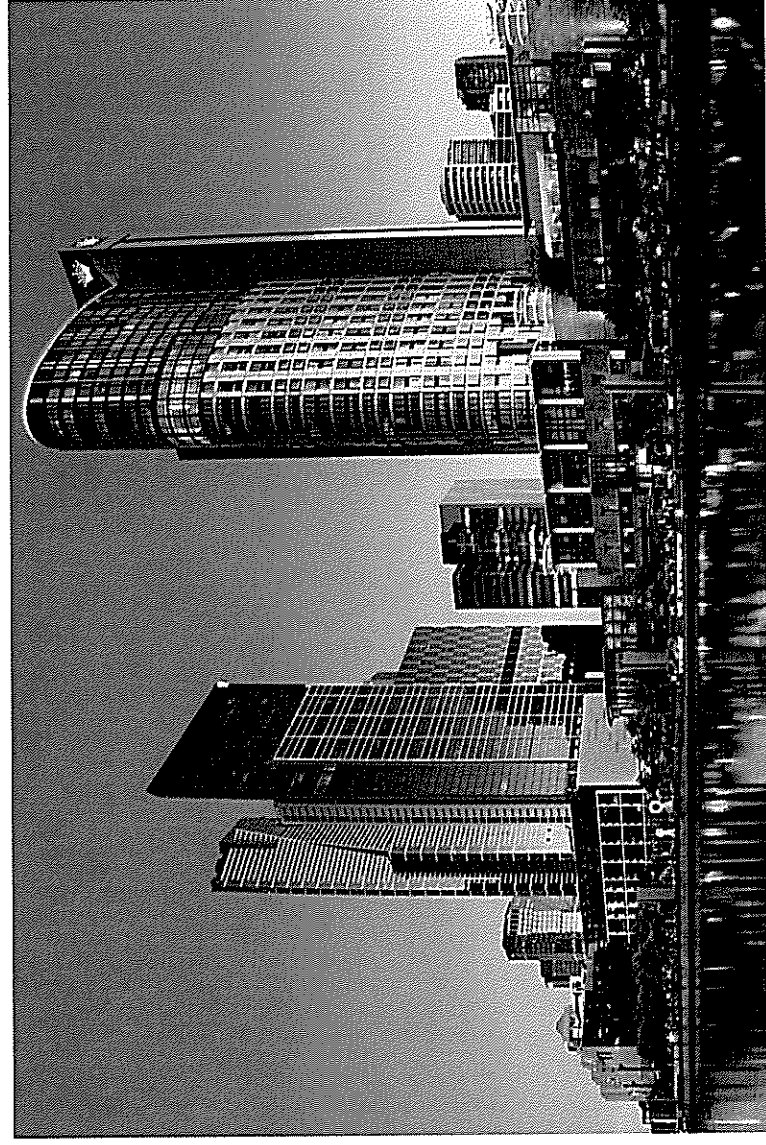


Southbank Precinct Skyline



17

City of Vaughan Making An Informed Decision | Southbank Precinct - Images

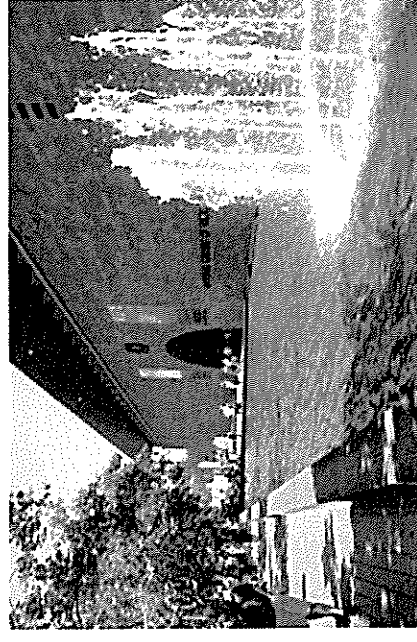


Crown Melbourne Integrated Complex

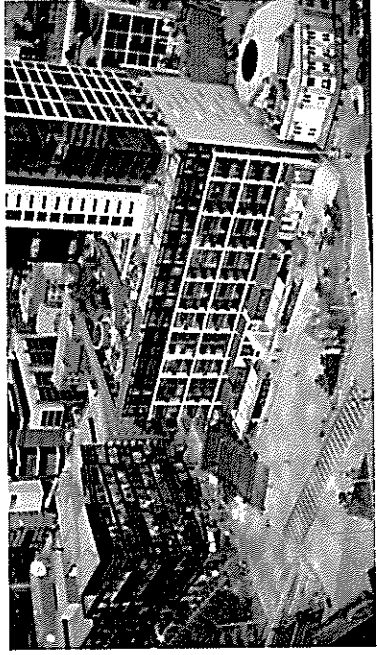
City of Vaughan Making An Informed Decision | Southbank Precinct - Images



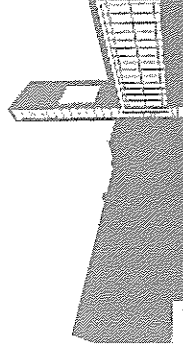
Federation Square, Art Gallery, Public Gathering Space



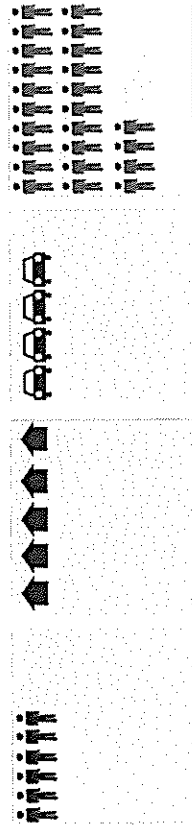
City of Vaughan Making An Informed Decision | Southbank Precinct - Images



Mixed-Use Development

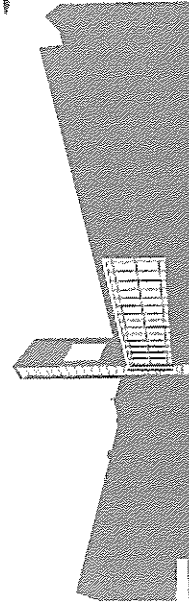
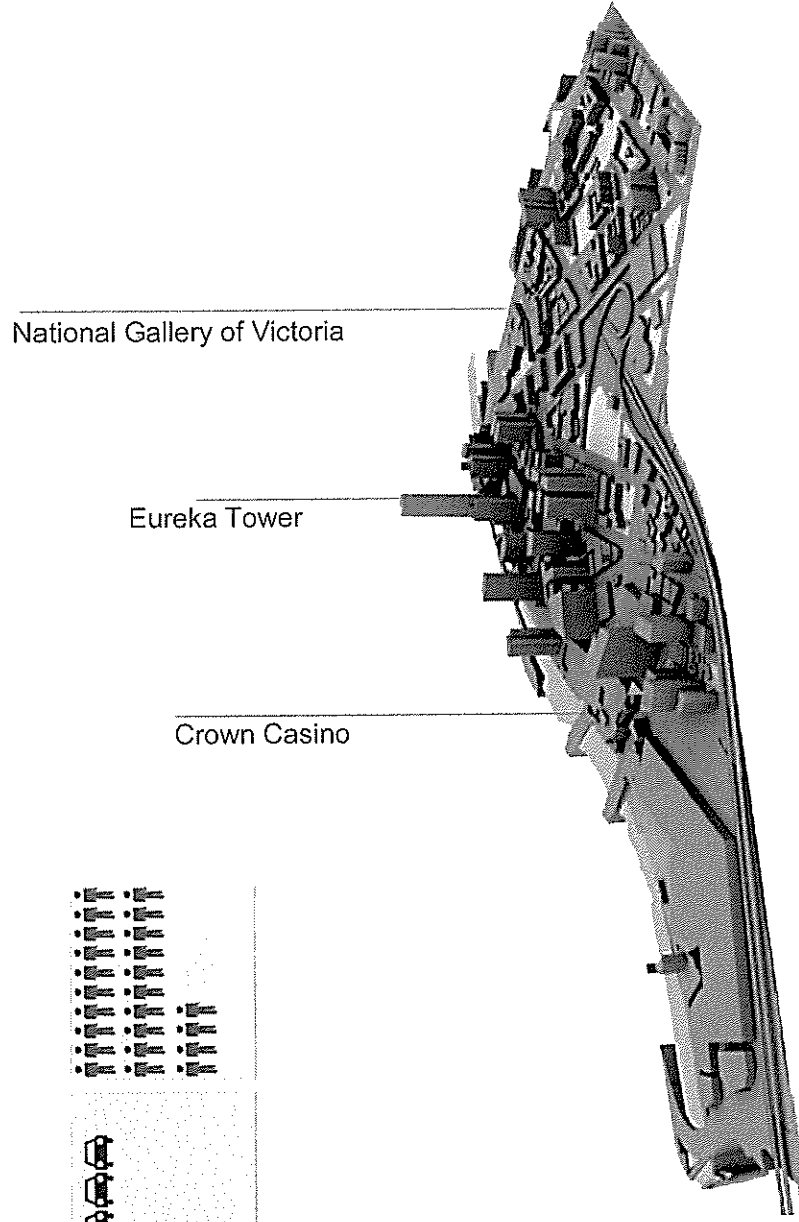


City of Vaughan Making An Informed Decision | Southbank Precinct



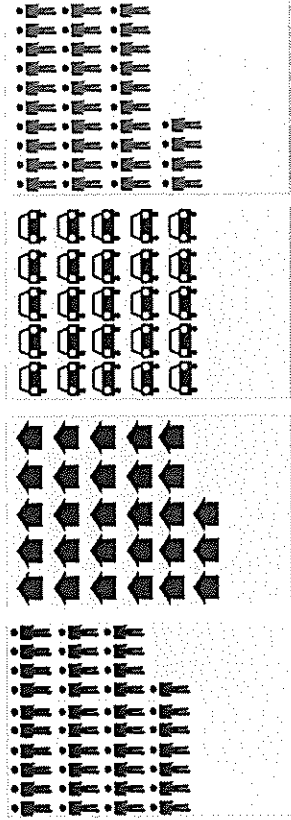
2010 Existing Condition

10,500 Residents
8,080 Dwellings
38,100 Workers



21

City of Vaughan Making An Informed Decision | Southbank Precinct



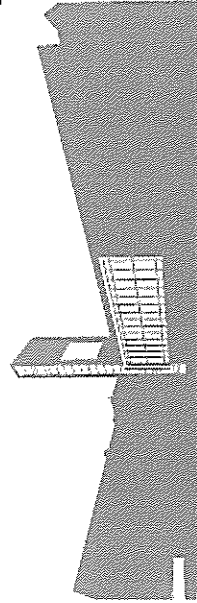
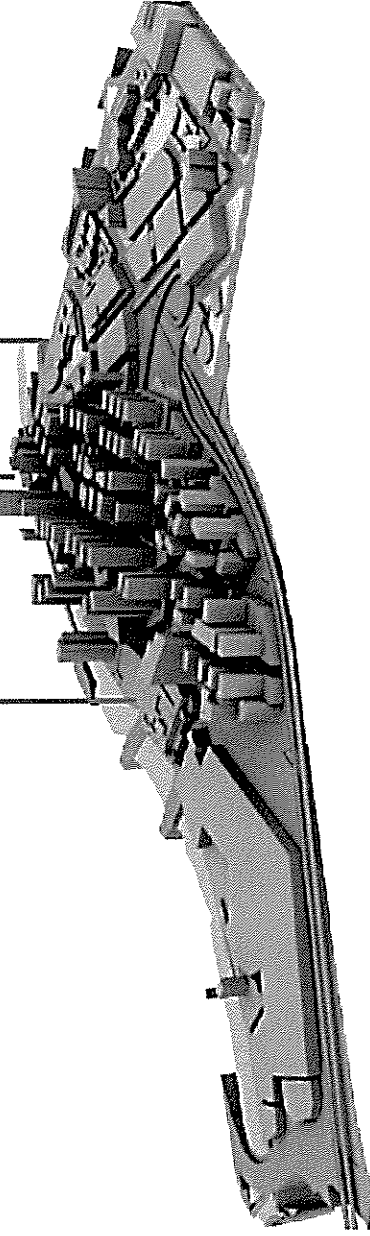
2040 Per Precinct Plan

58,500 Residents
45,000 Dwellings
53,470 Workers

National Gallery of Victoria

Eureka Tower

Crown Casino



City of Vaughan

Making An Informed Decision | Southbank Precinct

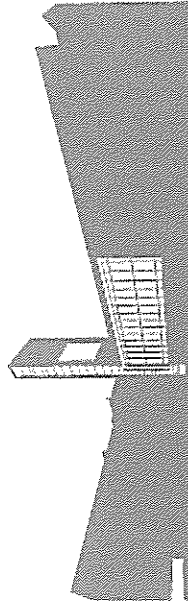
Demographics

The population is now 10,500 and growing at twice the rate annually than the municipality overall;

It is characterized by predominantly young adults aged 20 to 34 years, usually living alone or as couples;

It has the third largest concentration of young people (12 to 25 year olds) in the municipality;

Approximately 25% of residential construction that will begin in the next five years will be in Southbank.



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City of Vaughan

Making An Informed Decision | Southbank Precinct

Employment/Occupations

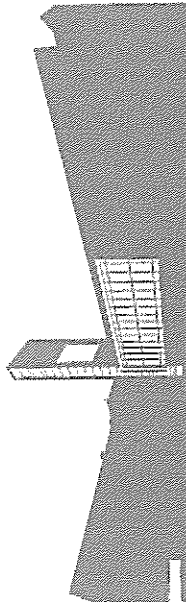
The population is highly educated and workers and employed residents are more often in higher status occupations; More than 36% have a BA Degree or higher

Housing

The vast majority of residents live in high-rise apartments, nearly two-thirds of them rent and the suburb is one of the municipality's most expensive in which to rent;

Economy

The median household income in Southbank is one of the municipality's highest; Southbank has the municipality's lowest proportion of micro businesses (businesses employing less than five staff).



24

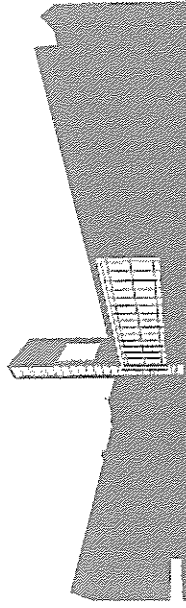
City of Vaughan Making An Informed Decision | Southbank Precinct

Southbank and the Vaughan Metropolitan Centre

City of Melbourne has recently completed a 30-year Plan for the Southbank precinct titled *Southbank Structure Plan 2010*.

The Structure Plan 2010 outlines a preferred scenario for Southbank that integrates land use, built form, mobility and access, open space, community infrastructure and sustainable infrastructure to achieve a livable and sustainable Southbank.

City of Vaughan has recently completed its Official Plan and Secondary Plan for the Vaughan Metropolitan Centre – an intense, dynamic community that in time will become the heart of the city, economically, culturally and physically.



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City of Vaughan

Making An Informed Decision | Southbank Precinct

Southbank and the Vaughan Metropolitan Centre

Southbank Structure Plan 2010 has six short to medium term proposals and two long-term project initiatives.

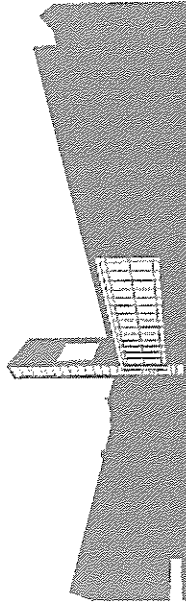
Short-Medium Term:

1. **Three New Hearts**

Provide three new local activity nodes to be focal points of new commercial, retail and community infrastructure development and local social life in Southbank

2. **Connect and integrate Southbank with the central city and the Yarra River**

Position Southbank as the natural extension of the city, establishing the Yarra River at the city's centre, not its edge. Provide easy and attractive access to and across the river from the central and southern parts of Southbank.



City of Vaughan

Making An Informed Decision | Southbank Precinct

Southbank and the Vaughan Metropolitan Centre

3. A High Quality Public Realm

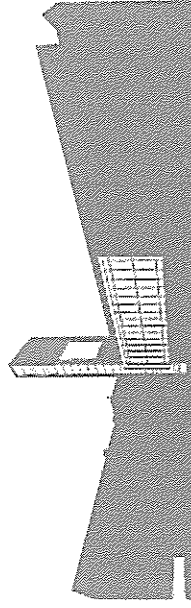
Deliver key public realm initiatives of the Southbank Plan, establish new parks within the area and deliver a finer grain of attractive public gathering spaces

4. A New Streetscape Vision

Establish new built form controls that prioritize the delivery of lively and characterful streetscapes. This addresses the current practice of assessing new building applications on their individual architectural merit without consideration of their contribution to the whole streetscape experience. This will make Southbank a safer, friendlier and more attractive place to be

5. A Connected and Permeable Neighbourhood

Design, manage and expand the existing network of laneways to enhance connectivity and permeability



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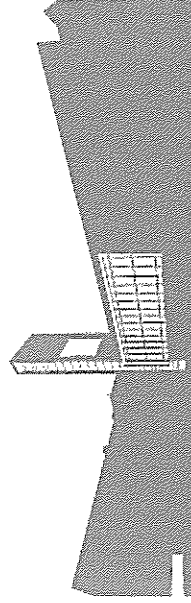
City of Vaughan

Making An Informed Decision | Southbank Precinct

Southbank and the Vaughan Metropolitan Centre

6. Sustainable Buildings

Ensure new buildings are energy efficient and adapted to climate change and that existing buildings are retrofitted to improve their performance



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1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99	100

Lashings of LEGO at Queensbridge Square

Figure 1. The effect of the concentration of the inhibitor on the rate of polymerization of α -methylstyrene in the presence of SnCl_4 at 25°C .

- Where About Us
 Media Centre
 What Drives Us
 Employment
 Teachers
 Information for Parents
 Kerner Hall Facts

Alongside the artistic abundance of Australia's vibrant performing arts companies and festivals for which we proudly provide the spotlight, and the local and international waves of our commercial partners, 2013 is set to be an historic year.

the fact that the first of the two main groups of the population, the "white" population, is the one that is most affected by the economic crisis. The second group, the "black" population, is the one that is least affected by the economic crisis. The third group, the "colored" population, is the one that is most affected by the economic crisis. The fourth group, the "indian" population, is the one that is least affected by the economic crisis. The fifth group, the "mestizo" population, is the one that is most affected by the economic crisis. The sixth group, the "mulatto" population, is the one that is least affected by the economic crisis. The seventh group, the "caste" population, is the one that is most affected by the economic crisis. The eighth group, the "caste" population, is the one that is least affected by the economic crisis. The ninth group, the "caste" population, is the one that is most affected by the economic crisis. The tenth group, the "caste" population, is the one that is least affected by the economic crisis.

the fact that the authors did not attempt to control for the possibility of confounding by other factors, such as age, sex, and education, which may be associated with both the exposure and the outcome.

It is also important to note that the results of the present study are based on a cross-sectional design. Future research should use a longitudinal design to investigate the stability of the findings over time.

Figure 1. The effect of the concentration of the *Agaricus bisporus* spores on the growth of *Agaricus bisporus* on the substrate.

2023 10/10/2023

ABOUT ACCA

The Australian Centre for Contemporary Art is Melbourne's leading contemporary art gallery presenting the most challenging, innovative and creative visual art of our time.

Designed by Melbourne based architects, Wood Marsh, ACCA's distinctive steel building is in the heart of Melbourne's arts precinct in SoHoCentral. The landmark east-end structure is one of Melbourne's recent cultural icons.

ADCA brings the latest and most significant news by living areas turn around the world to its audience, and connects new networks by local and international agents.

ACCA is a Kumbhalgarh, in the only stage gallery in Australia to be used for contemporary Indian art exhibition.



Lady Quening
 Coming Around My Room 5753

Arts Centre Melbourne













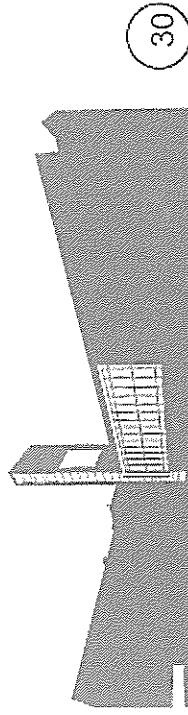
City of Vaughan

Making An Informed Decision | Southbank Precinct

Southbank and the Vaughan Metropolitan Centre – Integration with social and cultural events and institutions

Crown Complex to –

Melbourne Aquarium	600m
Queensbridge Square	700m
Art Gallery	1 kms
Australian Arts Centre	950m
Photography Studies College	550m
Art Play Children's Art Centre	1.4 kms
National Gallery of Victoria	1.2 kms
University of Melbourne	3.8 kms



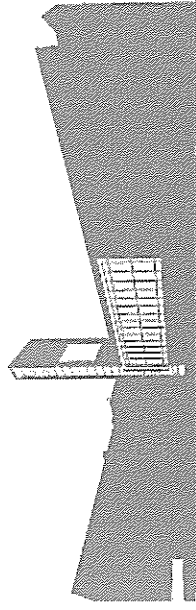
City of Vaughan

Making An Informed Decision | Southbank Precinct

Southbank and the Vaughan Metropolitan Centre

Melbourne has been successful in creating Southbank into a vibrant arts, cultural and leisure precinct, including retail, residential, restaurant/bistro, office, casino and other entertainment. It is also one of the fastest growing residential and office nodes in the City.

Melbourne's Southbank Precinct clearly identifies that an integrated Entertainment and Gaming Complex with convention, hotel, retail and restaurants can be an anchor development that supports residential, commercial and office development while maintaining a connection to the vision and urban fabric.



City of Vaughan

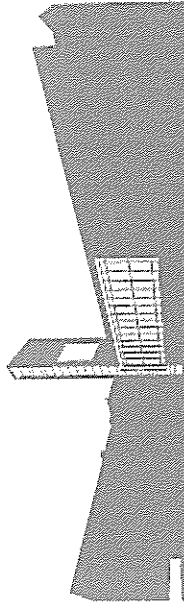
Making An Informed Decision

How would this complex affect local business and land value?

- Further to the example of Melbourne's Southbank Precinct, staff identified through research the **Casino Revenues and Retail Property Values: The Detroit Case**

This study analyzes the effects of commercial casinos on retail property values in the Detroit urban area. Accounting for property characteristics and proximity to the casinos, casinos are found to have a significantly positive influence on retail property values. The effect is stronger within a five-mile radius of the casinos, suggesting that casinos have a complementary, rather than a substitution, effect on other businesses.

This provides some of the first micro-level empirical evidence to support the “drawing power” of casinos and impact of consumer spending on surrounding businesses.

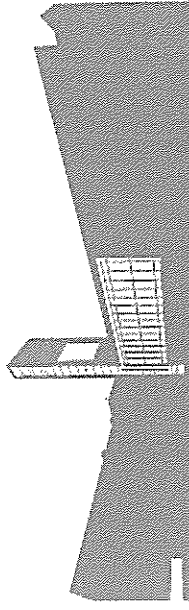


City of Vaughan

Making An Informed Decision

Are the Landowners open to this type of investment?

- Staff provided the OLG a list of VMC landowners as is the case with any potential investment that has identified the VMC as a site for a specific real estate requirement.
- The OLG has met with local landowners in the Vaughan Metropolitan Centre. They confirmed that they would be open to further investigating an opportunity to be a site for the integrated entertainment and gaming complex. However, all said they did not want to begin formal discussions until Vaughan Council has approved Vaughan to be a host municipality.



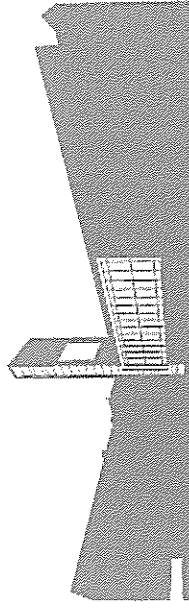
City of Vaughan

Making An Informed Decision | Financial Sustainability

The OLG funding formula, as recently amended, highlights that the potential hosting fee Vaughan would receive if it was the location of a \$1.2-1.5B integrated entertainment and gaming complex would be \$32M – Annually.

Annual Property Taxes are estimated to be:

City	\$2.4 – \$3.7 M
Region	\$4.3 – \$6.4 M
Education	\$9.6 – \$14.4 M

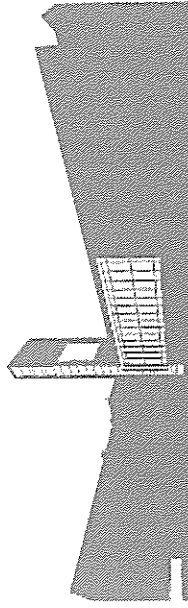


City of Vaughan

Making An Informed Decision | Financial Sustainability

Identified in the Financial Master Plan, the City is facing a magnitude of financial pressures over the next 10+ years that will require Council to significantly raise taxes or find a non-taxation revenue source(s) to address the impending deficits.

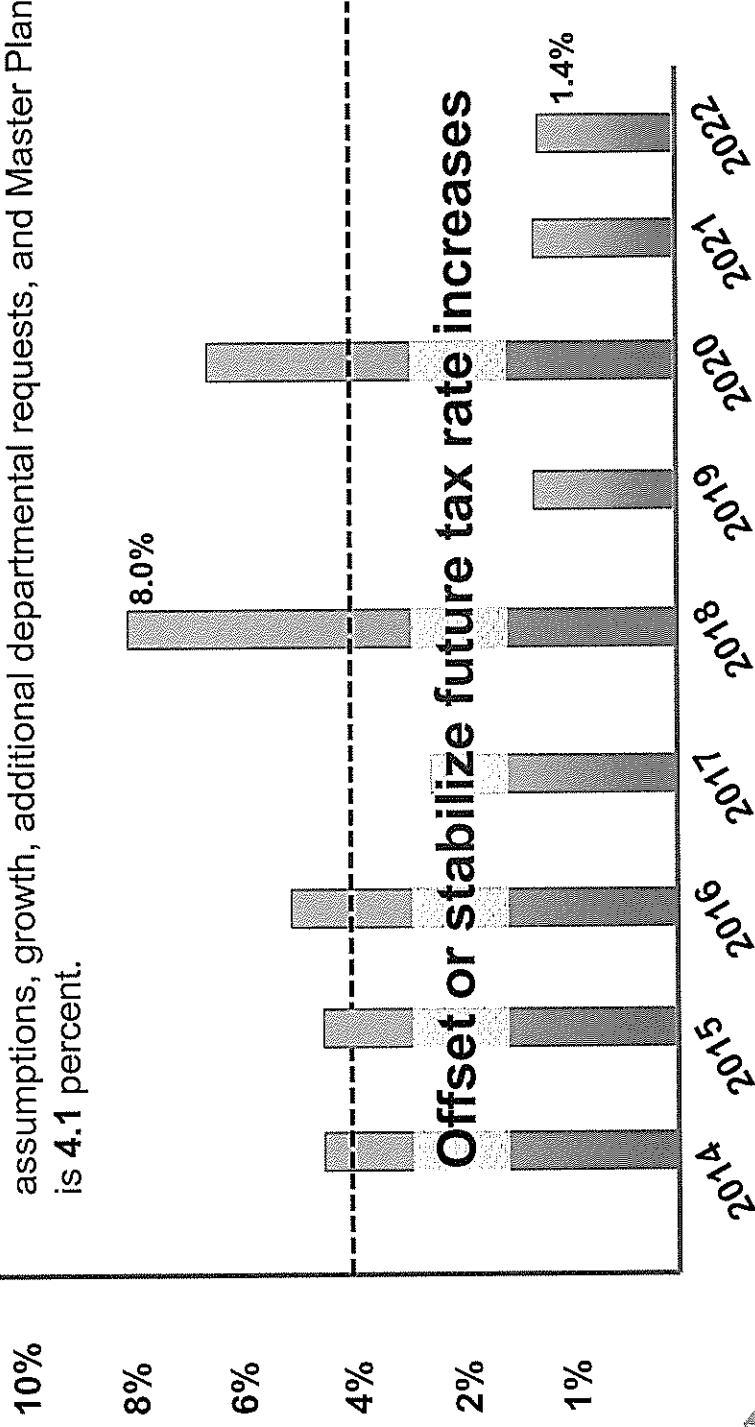
- Financial Pressures that have identified in the Budget Process and City's Financial Plan include:
 - Maintaining and Increasing Service Levels
 - Existing infrastructure replacement funding gap of \$151.4M in 2012 growing to \$327.4M in 2022
 - Funding existing Master Plans



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City of Vaughan Making An Informed Decision | Financial Sustainability

The average annual forecast tax increase, taking into consideration base assumptions, growth, additional departmental requests, and Master Plans, is **4.1 percent**.

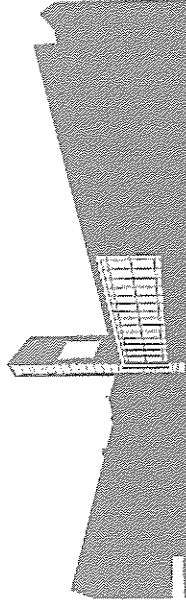


City of Vaughan

Making An Informed Decision | Financial Sustainability

As well as acting as a catalyst and an anchor to the cultural and tourism industry, the hosting fee of \$32 Million per year received from the Province as the site of the Integrated Entertainment and Gaming Complex will make a substantive contribution to the City's financial sustainability over the next 20 years.

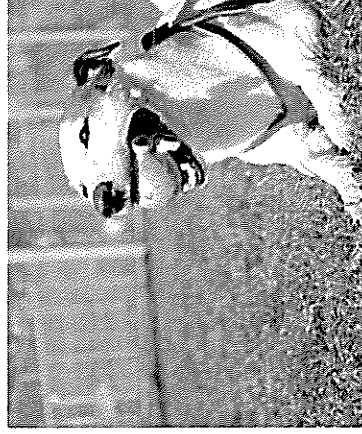
- Offset or stabilize future tax rate increases
- Fund the City's portion of the New Vaughan Mackenzie Health Hospital
- Acquisition of parkland
- Bolster City Reserves
- Repair and replace infrastructure, such as roads, water/wastewater, parks, indoor recreation, library facilities and other public infrastructure across the City



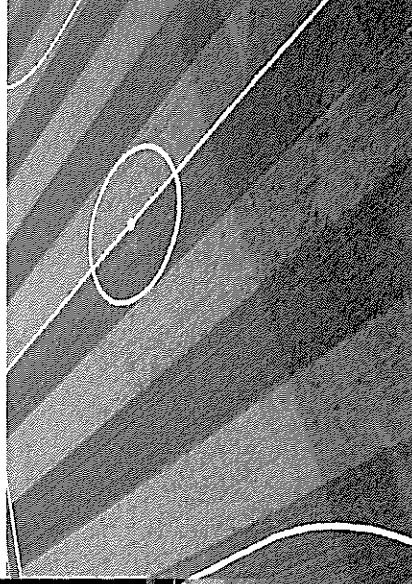
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Examples of City Projects Requiring Funding

Off-leash parks



Artificial turf and multi-use fields



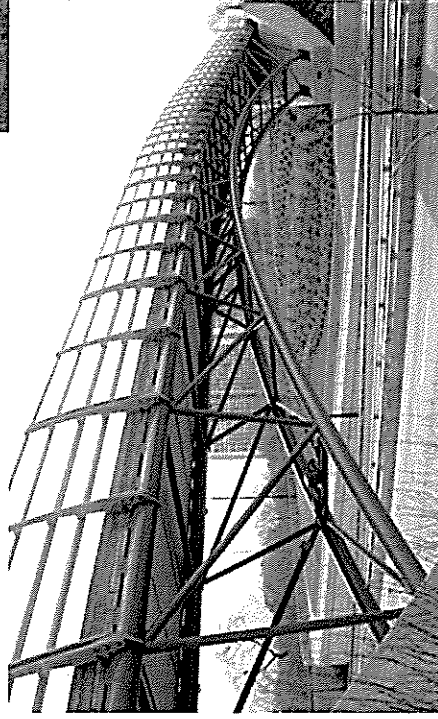
Playground replacement and
safety surfacing



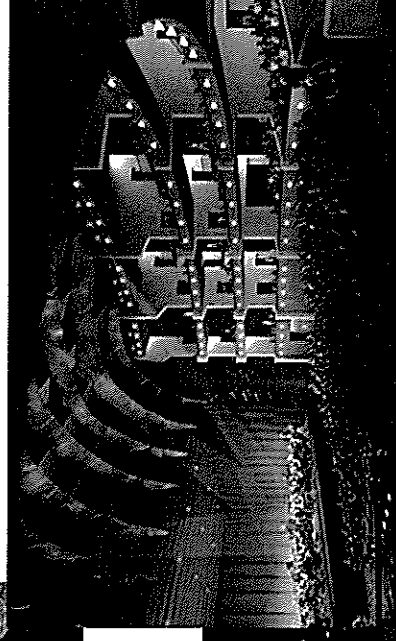
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Examples of City Projects Requiring Funding

Pedestrian Bridges



Road Maintenance



Performing Art Space

