



Final Report for:
CITY OF VANCOUVER

Attitudes Toward Gaming in the City of Vancouver

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January 15, 2004





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METHODOLOGY

This report details the findings of a telephone survey conducted among residents of the City of Vancouver between December 8th and December 15th, 2003. The poll is based on a randomly selected (using random digit dialing) sample of 700 adult residents. With a sample of this size, the results are accurate to within ± 3.7 percentage points, 19 times out of 20, of what they would have been had the entire adult population of the City of Vancouver been surveyed. The margin of error will be larger within regions and for other sub-groupings of the survey population. These data were statistically weighted to ensure the sample's regional and age/sex composition reflects that of the actual population according to 2001 Census data.

Screening questions were used to classify residents into one of six regions of the city and the sample was designed as follows to allow for independent analysis of each region.

1. 125 interviews were conducted in the Downtown Peninsula – comprising residents living North of False Creek and West of Main Street.
2. 125 interviews were conducted in the Hastings Sunrise community – comprising residents living North of Broadway and East of Nanaimo, as well as those living West of Victoria and North of East Hastings.
3. 100 interviews were conducted in the Northeast (excluding Hastings Sunrise) – comprising residents living North of 16th Avenue and East of Main Street.
4. 100 interviews were conducted in the Northwest (excluding the Downtown Peninsula) – comprising residents living North of 16th Avenue and West of Main Street.
5. 125 interviews were conducted in the Southwest – comprising residents living South of 16th Avenue and West of Main Street.
6. 125 interviews were conducted in the Southeast – comprising residents living South of 16th Avenue and East of Main Street.

The margin of error for a sample of 100 residents is $\pm 9.8\%$ (19 times out of 20) and for a sample of 125 residents it is $\pm 8.8\%$ (19 times out of 20). Any statistically significant differences in opinion between these six areas are noted in the report.

EXECUTIVE SUMMARY

This report provides the detailed findings of a survey aimed at assessing the attitudes and opinions of Vancouver residents with respect to the Plaza of Nations Casino Proposal. To provide additional context, a few questions were also asked about the proposal to add slot machines at Hastings Park Racetrack.

These survey results sit in the context of gambling and casino issues being very low on Vancouverites' issues agenda. Currently, only four percent say that gambling/casinos is an issue that should receive the greatest attention from local leaders. Instead, “crime/violence/safety” (24%) tops their list of concerns followed closely by “transportation/transit/BC Ferries strike” (24%) and “poverty/homelessness” (22%). Only in the Hastings-Sunrise community does gambling/casinos rate among the top 5 issues (at 18% it places fourth).

Residents' opinions about gambling facilities in BC are mixed. Although half (50%) of Vancouverites support “expanding the number of charity Bingos” in BC only three-in-ten (30%) support “expanding the number of casinos” in BC. Meanwhile, at four-in-ten (39%), support for “reducing the overall number of casinos but building a few larger casinos instead” lies between the other two items. **Overall, residents are divided on the matter but more residents say that Vancouver's gaming facilities are a liability (56%) than say they are an asset (40%) for the City.**

Vancouverites' overall knowledge about what games are currently available is mixed. By and large they can correctly identify which games are available (Black Jack – 81%, Roulette – 68% and Poker – 66%). But, despite being central to the debate over these proposals, Vancouverites are not well informed as to whether slot machines are currently available at casinos in the City of Vancouver. Currently two-thirds (65%) incorrectly say that they are available while only one-quarter (23%) correctly say that they are not.

Most (79%) Vancouverites are aware of the Hastings Park Racetrack proposal but relatively few (26%) residents are aware of the Plaza of Nations Casino proposal. Those who are aware of the Plaza of Nations proposal are not aware of the specifics. The largest number (26%) simply remember that the issue is controversial and the debate is ongoing. A slightly smaller number (22%) say they only remember that there has been a proposal, while 15 percent say they remember seeing, hearing or reading that the Plaza of Nations proposal has been delayed as a result. Newspapers (35%) have been the primary source for this information, followed by radio (29%) and television (24%).

When it comes to support and opposition for each proposal, **residents are almost evenly split over the Hastings Park Racetrack Proposal (46% support, 49% oppose) and a majority (60%) are opposed to the Plaza of Nations Proposal (35% support).** The main reason supporters of the Plaza of Nations proposal give for their support is “the City will receive additional revenue” (27%). This is followed by: “increased tourism to the area/more people downtown” (15%), “good location/convenient” (14%), and “nothing wrong with gambling/I believe in legalised gambling” (13%). Meanwhile opponents say their main reasons for opposing the proposal are: “gambling is addictive/destructive to society” (25%), “don't believe in gambling/don't want to encourage it” (24%), “Plaza of

Nations is not the right location for a casino” (14%) and “increased crime/violence/drugs” (13%). Looking at the two communities most directly affected by these proposals shows that Downtown residents are more supportive than other Vancouverites of both proposals (54% support the Hastings Park Racetrack proposal, 42% support the Plaza of Nations casino proposal) while Hastings-Sunrise residents are more likely to support the Plaza of Nations casino proposal (45%) but slightly less likely than other Vancouverites to support the Hastings Park Racetrack proposal (40%).

Thinking about likely impacts, residents say that positive effects of the Plaza of Nations casino will be largely economic while the negative effects will be largely social. Three-quarters of residents say the casino will have a positive impact on “City revenue” (77%) and “employment opportunities” (77%). Meanwhile, a majority says that it will have a negative impact on “crime” (52%) and “the number of problem gamblers in Vancouver” (58%). Residents are more divided on the impact a casino will have on “local businesses” (47% positive impact, 28% negative impact) and “revenue from charity Bingos” (41% positive impact, 35% negative impact).

Residents think there are convincing arguments in support and opposition to the Plaza of Nations casino proposal. The two most compelling supporting arguments are “the casino will create approximately 400 jobs” (69%) and “the City of Vancouver would receive an estimated \$10 to \$12 million a year in additional revenues from this casino” (67%). Less compelling supporting arguments include: “other cities in the Lower Mainland have either built or expanded their gaming facilities without the problems many predicted” (49%), “this proposal could actually reduce the number of casinos in Vancouver if several existing casinos are closed and replaced by one larger casino” (42%), “Vancouver is the only core municipality that does not currently allow slot machines” (37%), and “there will be onsite programs to provide awareness and education about problem gambling as well as a toll free 1-800 helpline” (33%). In contrast, the two most compelling opposing arguments are “there would be an increase in traffic at the site and in the surrounding community” (75%) and “a casino at Plaza of Nations could jeopardize the cultural uses of the Plaza of Nations facility” (65%). Other arguments against the proposal are also compelling with a majority of Vancouverites. They include: “a casino at Plaza of Nations could jeopardise the cultural uses of the facility” (65%), “slot machines should not be allowed because they are an easy way to get addicted to gambling” (63%), “casino gambling will take revenue away from charity bingos” (59%), and “Plaza of Nations is too close to Vancouver’s poorer neighbourhoods and is therefore targeting economically vulnerable people” (58%).



Going forward, residents say they would be most likely to seek additional information about the Plaza of Nations casino proposal from newspapers (56%) or television (49%), while three-in-ten say they would be most likely to use radio (34%) or the Internet (31%). In terms of information sources about this proposal, residents say that “community and neighbourhood associations” (77%) are the most believable followed by “charitable organizations” (75%). The believability of “City of Vancouver Staff” is ten points lower at 65 percent and is tied with the “Multicultural Coalition Against Gambling Expansion” (65%). Sixty-one percent say that “local business leaders” are believable on this issue and 51% say “the BC Lottery Corporation is believable. “Casino operators” is the only group for which more residents say their statements are not believable (65%) than believable (33%).

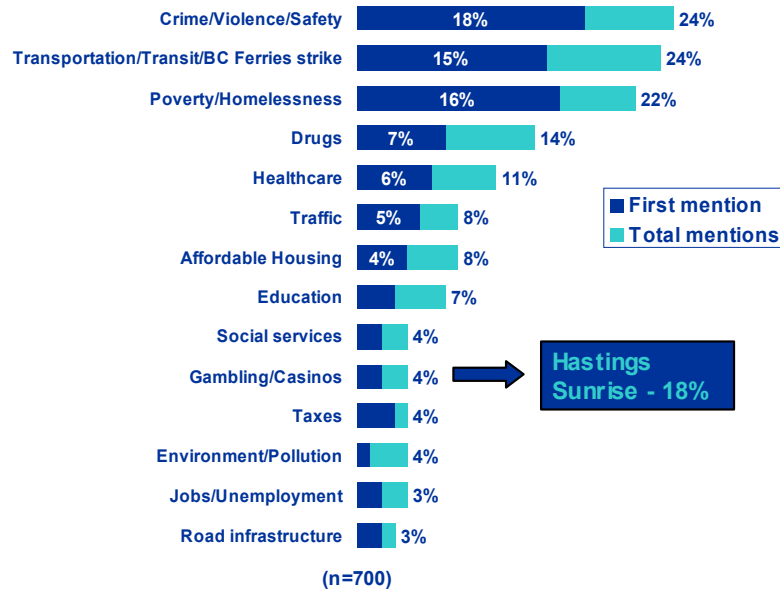
DETAILED FINDINGS

Top-of-Mind Issues Facing Vancouver

Crime and safety (24% total mentions), transportation and transit (24%), and poverty and homelessness (22%) are the three local issues that are front and centre on the minds of Vancouver residents.

Top-of Mind-Issues in Vancouver

"In your view, as a resident of the City of Vancouver what is the most important LOCAL issue facing your community, that is, the one issue you feel should receive the greatest attention from your local leaders?"



Crime, violence, and safety concerns are most frequently mentioned on both a first mentions (18%) and total mentions (24%) basis. While this finding is slightly higher than the norm for Lower Mainland municipalities (11% first mentions and 17% total mentions), residents may have been responding to several recent high profile law and order issues in Vancouver. However, there may be some real and recognised basis for concern. Vancouver Police Department statistics show that there has been an increase in both violent and property crime since 2001, although the rate of reported crime remains significantly lower than eight years ago.¹

¹ Vancouver Police Statistical Reports: April – June 2003, Annual Report 2002, and Annual Report 1999. Available online at <http://www.city.vancouver.bc.ca/police/Planning/stats.html>

Transportation and social issues are also very important to Vancouver residents. In addition to improving transportation and transit services (24% total mentions), residents feel that their local leaders should be paying attention to traffic (8%), road infrastructure (3%), and parking (2%). And beyond tackling poverty and homelessness (22% total mentions), residents want to see their leaders attend to the drug issue (14%), healthcare (11%), affordable housing (8%), education (7%), social services (4%), and the environment (4%).

Gambling and casinos appear much lower on residents' radar in terms of both first (2%) and total mentions (4%). However, gambling and casinos are much more likely to be top-of-mind issues to Hastings-Sunrise residents (14% first mentions and 18% total mentions), but barely relevant at all to Downtown residents (1% first and total mentions combined). This suggests that so far, the higher-profile Hastings Park Racetrack slot machine proposal has sparked more local neighbourhood interest than the lower-profile Plaza of Nations casino proposal.

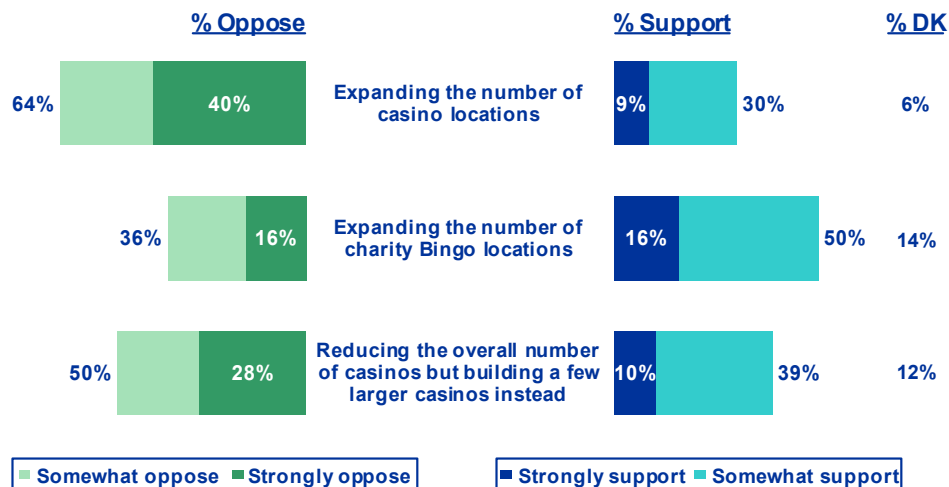
Gaming in Vancouver

Attitudes Toward Expanding Gaming Facilities

Vancouver residents are by and large not supportive of expanding gaming facilities in the province. While there is lukewarm support for expanding the number of charity bingo locations, majority opposition emerges in response to suggestions of increasing the number or capacity of for-profit casinos.

Attitudes Toward Gaming Facilities in BC

"Generally speaking do you support or oppose in BC?"



(n=700)

In terms of the three gaming options presented, residents are most supportive of expanding the number of charity bingo venues (50% support versus 36% oppose). However, it should be noted that strong opinions are evenly distributed – an identical 16 percent of residents “strongly support” and “strongly oppose” expanding charity bingo facilities.

Regionally, Downtown residents are somewhat more likely to support expanding charity bingo (58% support). Hastings-Sunrise residents (52%), however, are no more or less likely than other Vancouver residents to support bingo expansion (50%).

More Vancouver residents oppose (50%) than support (39%) the concept of building a few larger destination style casinos while reducing the overall number of casinos. One-in-four residents (28%) “strongly oppose” this idea, compared to one-in-ten (10%) that “strongly support”.

Regionally, Hastings-Sunrise residents are more likely to support more destination style casinos (49% support). Downtown residents (42%), meanwhile, are no more or less likely than other Vancouver residents to support more destination style casinos (39%).

Residents are least supportive of expanding the number of casino locations in the province (64% oppose versus 30% support). In fact, a higher proportion of residents “strongly oppose” (40%) expanding the number of casinos than those who “strongly” or “somewhat” support the initiative combined.

Regionally, both Downtown (39%) and Hastings-Sunrise (37%) residents are somewhat more likely to support more casino locations than the typical Vancouver resident (30%).

Comparing respondents’ attitudes towards expanding gaming facilities to their opinions of the Plaza of Nations and Hastings Park Racetrack proposals, their views of gaming’s effects on the City, and their own gambling habits, it is not surprising to see that all three gaming options generate significantly more support among the following segments of the population:

- Residents who support the temporary casino proposal at the Plaza of Nations;
- Residents who support the Hastings Park Racetrack proposal;
- Residents who view gaming as an asset to the City rather than a liability; and,
- Residents who are gamblers.²

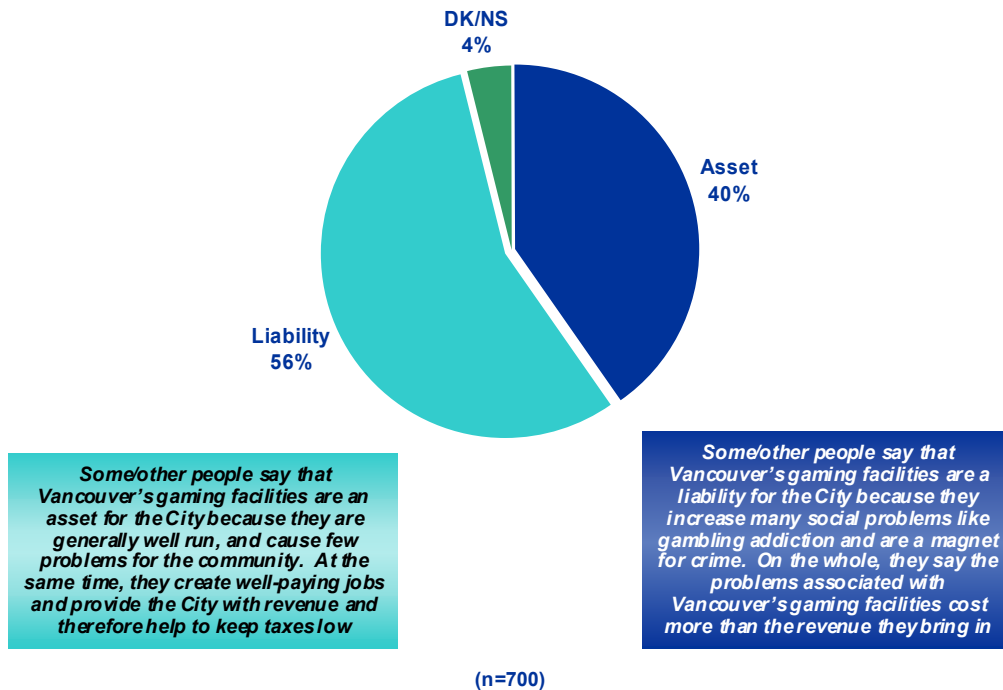
² *A gambler is defined as a resident who has engaged in one or more of the following gambling activities at least once in the past 12 months: placed a bet on a horse race, played table games at a casino, purchased a lottery ticket, played bingo for money, or played a slot machine.*

Gaming Facilities – An Asset or a Liability?

Overall, Vancouver residents tend to characterise Vancouver’s gaming facilities as more of a liability than an asset to the City.

Fifty-six percent say their opinion towards gaming resembles the statement: *“Vancouver’s gaming facilities are a liability for the City because they increase many social problems like gambling addiction and are a magnet for crime. On the whole, problems associated with Vancouver’s gaming facilities cost more than the revenue they bring in.”* Only 40 percent say that their opinion towards gaming is a closer match to the statement: *“Vancouver’s gaming facilities are an asset for the City because they are generally well run, and cause few problems for the community. At the same time, they create well-paying jobs and provide the City with revenue and therefore help to keep taxes low.”*

Vancouver’s Gaming Facilities – Asset or Liability?



Regionally, Downtown residents are somewhat more likely to view gaming as an asset (48%). Hastings-Sunrise residents (39%), however, are not any more likely than other Vancouver residents to see gaming as an asset (40%).

Demographically, men (47%) are significantly more likely than women (34%) to believe that gaming is an asset to the City of Vancouver. Results are relatively consistent over other key demographics such as age, household income, household status, and length of residency in the City.

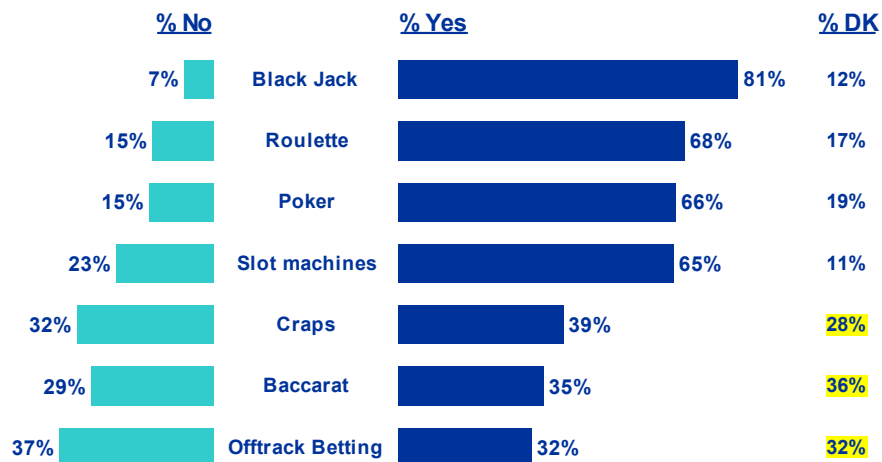
Knowledge of Games Available in Vancouver

Vancouver residents demonstrate decent knowledge of the types of games available at casinos in the City. Two-thirds or more correctly state that blackjack (81% say that this game is available to play), roulette (68%), and poker (66%) are currently available in Vancouver casinos. However, two-thirds (65%) also incorrectly believe that slot machines are already available in City of Vancouver casinos. This impression may well stem from the high-profile introduction of slot machines in many surrounding municipalities over the last few years. In contrast, only two-in-ten (23%) correctly assert that there are no slot machines in City of Vancouver casinos.

Residents are unsure about the availability of craps (not currently available in BC), baccarat (currently available), and off-track betting (not currently available at casinos) in Vancouver casinos. Approximately one-third of residents believe they are available, one-third believe they are unavailable, and one-third simply don't know.

Knowledge of Games Available at Vancouver Casinos

"To your knowledge, which of the following types of games are available at casinos in the City of Vancouver?"



(n=700)

Hastings-Sunrise residents and Downtown residents do not differ significantly from other Vancouver resident with respect to their knowledge of slot machines in the City.

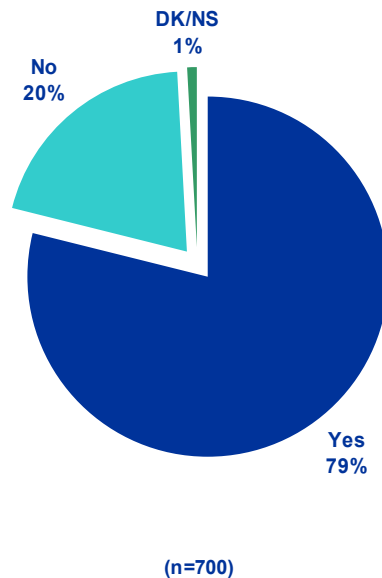
Hastings Park Racetrack Proposal

Awareness

Awareness of the Hastings Park Racetrack proposal is very high. Eight-in-ten (79%) Vancouver residents are aware of the proposed installation of slot machines at Hastings Park. Awareness is slightly higher in the Hastings-Sunrise neighbourhood (85%) and the rest of the Northeast (84%) area of the City, which surrounds the racetrack.

Awareness of Hastings Park Racetrack Proposal

"Have you recently seen, read, or heard anything about a proposal to allow the installation of slot machines at Hastings Park Racetrack?"



Awareness differs significantly by age, gender, income, household status, and length of residency in the City:

- Older (93% of those aged 55 or older are aware) and middle-aged (81% of those aged 35 to 54) residents are more likely to be aware of the Hastings Park proposal than younger residents (67% of those aged 18 to 34);
- Men (83%) are more likely to be aware than women (75%);
- Households earning more than \$40,000 per year (82%) are more likely to be aware than households earning less than \$40,000 (69%);
- Owners (87%) are more likely to be aware than renters (73%); and,

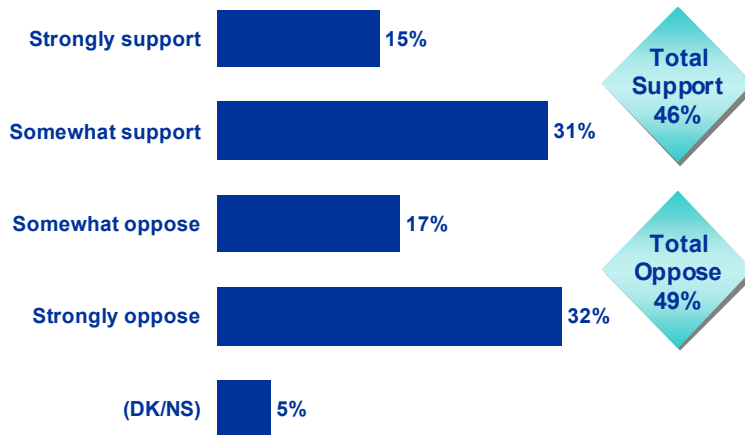
- Long-term residents (86% of those who have lived in Vancouver for 10 or more years) are more likely to be aware than short and mid-term residents (63% of those who have lived in Vancouver for less than 10 years).

Support and Opposition

In terms of total support and opposition for the Hastings Park Racetrack proposal, residents are almost evenly divided. Forty-six percent of residents support the addition of up to 600 slot machines at the racetrack and 49 percent oppose. The makeup of the support and opposition figures, however, differs dramatically. Support is soft, made up of just 15 percent who “strongly support” and 31 percent who “somewhat support” the proposal. Opposition, meanwhile, is quite firm – 32 percent “strongly oppose” the proposal, and 17 percent “somewhat oppose”.

Support for Hastings Park Racetrack Proposal

“As you may also know, the City of Vancouver has received a proposal to add up to 600 slot machines to the current gaming activities available at the Hastings Park Racetrack on the PNE grounds. Based on what you may have seen read or heard, do you support or oppose this proposal?”



(n=700)

Overall support is slightly lower in Hastings-Sunrise (40%), although a relatively larger core of strong supporters exists in the neighbourhood (20% “strongly support”). Meanwhile, opposition is highest and most intense in Hastings-Sunrise (59%, 46% “strongly oppose”). Conversely, Downtown residents are the most supportive of seeing gaming expansion at the PNE grounds (54%, 19% “strongly support”). Interestingly, those who think that slot machines are already available at Vancouver casinos (46%) are no more or less likely to support this proposal than those who do not think slots are already available (48%).



Demographically, men (53%) are significantly more likely than women (39%) to support the introduction of slot machines at Hastings Park. Otherwise, results are relatively consistent over other key demographics such as age, household income, household status, and length of residency in the City.

Plaza of Nations Proposal

Awareness

Awareness of the proposal to create a temporary casino at the Plaza of Nations is much lower than the Hastings Park Racetrack proposal. Only one-in-four (26%) residents have heard about the proposed initiative. Awareness is somewhat higher in the Downtown area (30%), which would host the casino, as well as in Hastings-Sunrise (34%), an area seemingly more attuned to gaming issues at the moment.

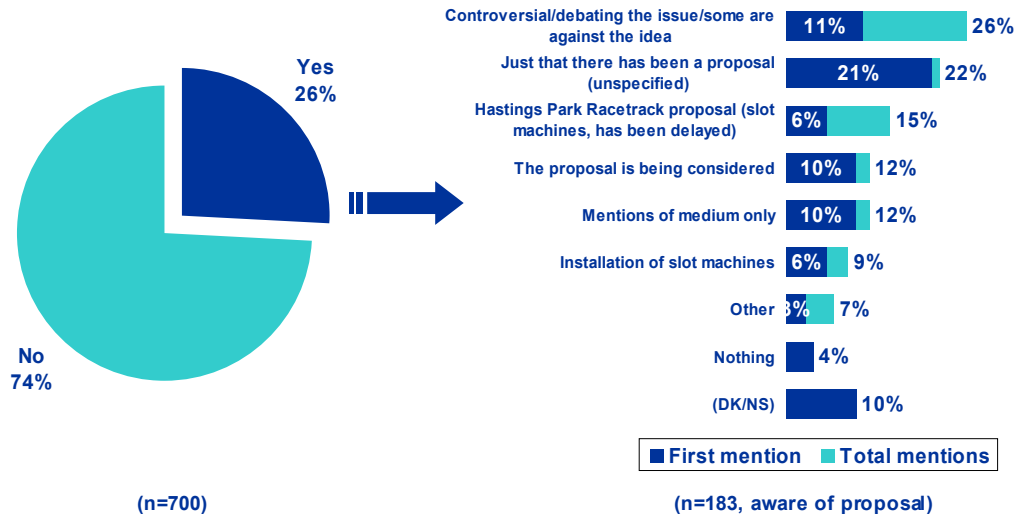
Awareness of the proposal differs significantly by age, household status, and length of residency in the City:

- Older (40% of those aged 55 or older are aware) and middle-aged (27% of those aged 35 to 54) residents are more likely to be aware of the Plaza of Nations proposal than younger residents (14% of those aged 18 to 34);
- Owners (34%) are more likely to be aware than renters (18%); and,
- Long-term residents (30% of those who have lived in Vancouver for 10 or more years) are more likely to be aware than short and mid-term residents (16% of those who have lived in Vancouver for less than 10 years).

Awareness of Temporary Casino Proposal for Plaza of Nations

"And, have you recently seen, read, or heard anything about a proposal to allow a temporary casino at the Plaza of Nations?"

"What do you specifically recall seeing, reading, or hearing with respect to the proposal to open a temporary casino at the Plaza of Nations?"



On a first mention basis, those who are aware of the proposal mostly recall just generally seeing, reading, or hearing about a proposal for a casino at the Plaza of Nations (21% first mentions).

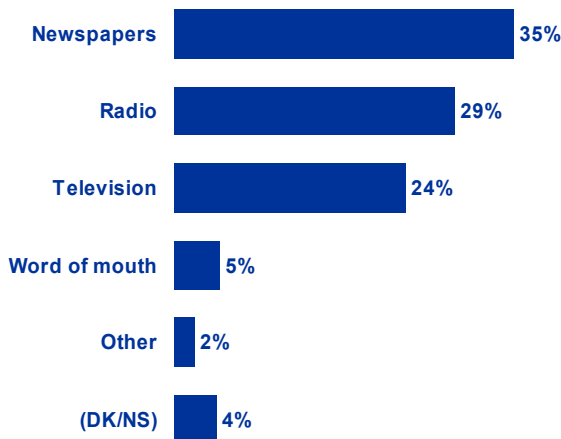
On a total mention basis, residents tend to remember either the controversy/debate surrounding the proposal (26% total mentions) or just generally about the proposal itself (22%). Residents also recall a connection between the Plaza of Nations proposal and the Hastings Park Racetrack being delayed (15%), that the proposal is currently under consideration (12%), and that it will include the installation of slot machines (9%). Twelve percent mention the medium through which they recall seeing, reading, or hearing about the proposal, while 14 percent are unable to give any specific mention.

Information Sources

Among those aware of the Plaza of Nations casino proposal, newspapers (35%), radio (29%), and television (24%) are currently the mediums through which residents are getting their main source of information. Residents are so far not using the Internet (no responses) as their main source of information for this issue.

Source of Information About Plaza of Nations Casino Proposal

“And what has been your main source of information about the Plaza of Nations casino proposal?”



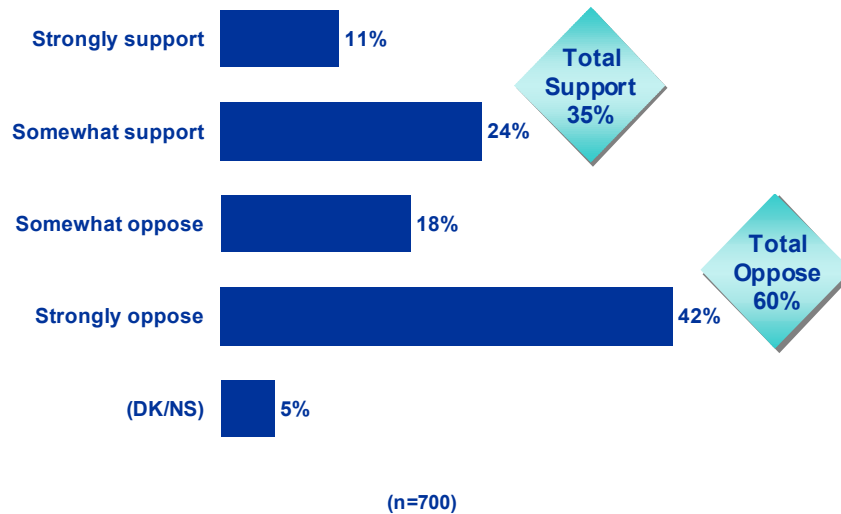
(n=183, aware of proposal)

Support and Opposition

There is a good deal of opposition to allowing a temporary casino at the Plaza of Nations that would feature both slot machines and expanded gaming tables. In total, six-in-ten (60%) residents oppose the proposal; four-in-ten (42%) “strongly oppose” the proposal. Overall support (35%), meanwhile, is much lower and is more soft than strong (11% “strongly” and 24% “somewhat”).

Awareness and Support for Plaza of Nations Casino Proposal

“As you may know, the City of Vancouver has received a proposal to allow a temporary casino at the Plaza of Nations. This casino would have up to 600 slot machines and 60 tables and could be at this temporary location for four years while a permanent site is found. Based on what you may have seen read or heard, do you support or oppose this proposal?”



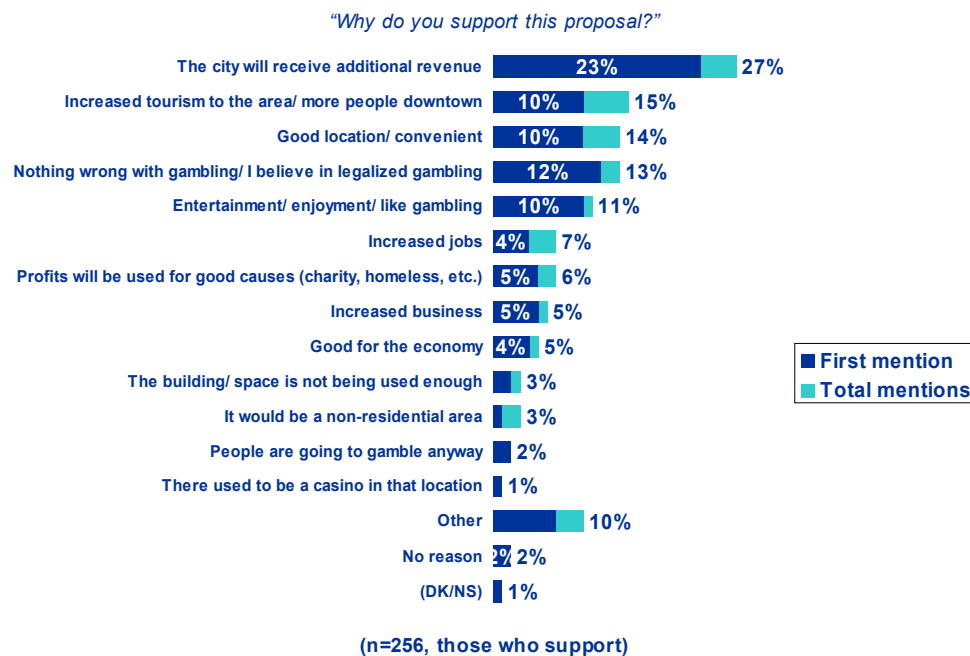
Support for the Plaza of Nations proposal is somewhat higher in the Downtown area (42%); however, opposition remains relatively consistent at 57 percent. Interestingly, Hastings-Sunrise residents are the most supportive of seeing gaming expansion at the Plaza of Nations (44%, 22% “strongly support”). Coupled with their strong opposition to slot machines at Hastings Park, this finding may point towards a desire of Hastings-Sunrise residents to strategically shift new gaming development towards Downtown in lieu of their own neighbourhood.

As is the case with the Hastings Park proposal, there is no statistically significant difference in support or opposition to the proposal between those residents who think that slot machines are already available at Vancouver casinos (36%) and those who do not (40%).

Demographically, men (45%) are significantly more likely than women (26%) to support a temporary casino at the Plaza of Nations. Results are relatively consistent over other key demographics such as age, household income, household status, and length of residency in the City.

Residents who support the Plaza of Nations casino proposal are most likely to say they support the proposal because of the positive economic stimulus they associate with casinos. “The City will receive additional revenue” is by far the most common refrain, both on a first mention (23%) and total mentions basis (27%). Other economic mentions are prevalent, such as “increased tourism to the area/more people downtown” (15% total mentions), “increased jobs” (7%), “increased business” (5%), and generally “good for the economy” (5%).

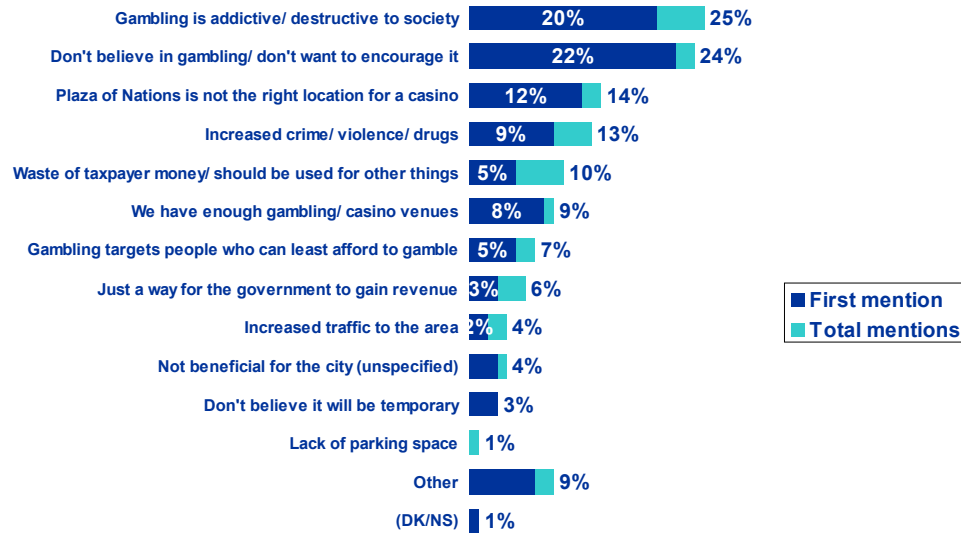
Reasons for Support of Plaza of Nations Casino Proposal



A second tier of reasons for support focuses on why the specific location, such as “good location/convenient” (14% total mentions), “the building/space is not being used enough” (3%), “it would be a non-residential area” (3%), and “there used to be a casino in that location” (1%). Moral reasons for support, such as “there’s nothing wrong with gambling/I believe in legalised gambling” (13%), “profits will be used for good causes (charity, homeless, etc.)” (6%), and “people are going to gamble anyway” (2%), also appear. A further 11 percent mention they are supportive of the proposal because they enjoy the entertainment and gaming aspects of casinos.

Reasons for Opposing Plaza of Nations Casino Proposal

“Why do you oppose this proposal?”



(n=413, those who oppose)

Residents who oppose the Plaza of Nations casino proposal are most likely to cite broad social or moral opposition to gaming as their reasons for opposition. Chief among these is “gambling is addictive/destructive to society” (20% first mentions and 25% total mentions) and “don’t believe in gambling/don’t want to encourage it” (22% first mentions and 24% total mentions). Other social and moral mentions are “increased crime/violence/drugs” (13% total mentions), “waste of taxpayer money/should be used for other things” (10%), “we have enough gambling/casino venues” (9%), “gambling targets people who can least afford to gamble” (7%), and that a casino would “not be beneficial to the City” (4%).

A second tier of reasons for opposition focuses on neighbourhood-level concerns. These are that the “Plaza of Nations is not the right location for a casino” (14% total mentions), “increased traffic to the area” (4%), “don’t believe it will be temporary” (3%), and “lack of parking space” (1%).

Perceived Impact of Plaza of Nations Casino Development

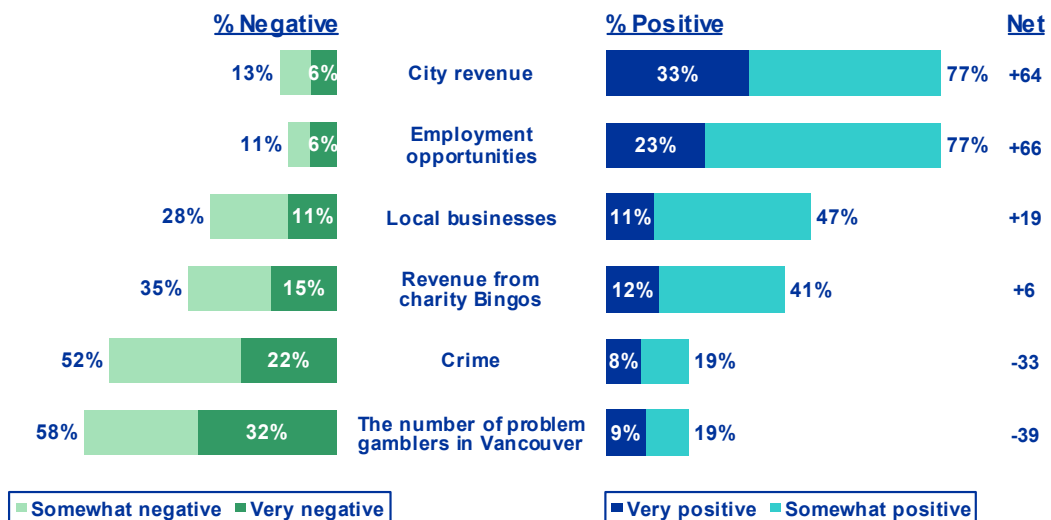
Vancouver residents are quite positive about the economic impacts of a casino at the Plaza of Nations, but relatively pessimistic in terms of its social consequences. It is evident that residents see the proposed casino's effects in terms of a trade-off between economic and social interests.

The vast majority of residents believe that the proposed casino would favourably affect City revenue (77%) and employment opportunities (77%). Residents are quite bullish on these attributes with 33 percent who say that the effects on City revenue will be “very positive” while 23% say likewise about employment opportunities. Only one-in-ten residents feel that City revenue (13%) and employment (11%) would suffer as a result of the casino going ahead. Residents are also upbeat on the fortunes of local businesses, as 47 percent feel that the casino would have a positive impact on local business and just 28 percent feel that it would have a negative impact.

Residents feel that charity bingo revenues would marginally benefit from the presence of a casino at the Plaza of Nations (41% positive impact, 35% negative impact). However, the majority of respondents feel that the casino will negatively affect problem gambling (58%) and crime (52%) in Vancouver. Only two-in-ten residents (19% apiece) feel that problem gambling and crime will be positively affected by the casino – less than the proportion who feels that its effects on these attributes will be “very negative”.

Impact of Plaza of Nations Casino Proposal

“In your opinion, will the creation of a casino with slot machines at the Plaza of Nations have a positive, negative or no impact on ... ?”



(n=700)

The economic attributes receive high net impact scores (positive impact score minus negative impact score). Employment opportunities (+66% net impact) and City revenue (+64%) lead the way, followed by local businesses (+19%). The social attributes, in contrast, score low or negatively in terms of net impact. While revenue from charity bingo manages to keep its head above water (+6%), residents are clear that they feel the casino will negatively impact the level of crime (-33%) and problem gambling (-39%).

Regionally, Downtown residents' attitudes are by and large no different than those of other Vancouver residents. However, Downtown residents are slightly more optimistic for revenue from charity bingo (45% positive impact, 28% negative impact, +17% net impact), employment opportunities (83% positive impact, 11% negative impact, +72% net impact), and local business (51% positive impact, 26% negative impact, +25% net impact).

Meanwhile, Hastings-Sunrise residents are slightly less pessimistic than other Vancouver residents in terms of the casino's effect on crime (26% positive impact, 49% negative impact, -23% net impact) and are slightly less optimistic than the typical Vancouver resident in terms of the employment opportunity offered by the proposed casino (73% positive impact, 14% negative impact, +59% net impact).

Reaction to Supporting and Opposing Arguments

Residents say that jobs and City revenue are convincing reasons to support the proposal. In all, seven-in-ten residents feel that "the casino will create approximately 400 permanent jobs" (69%) and "The City of Vancouver would receive an estimated 10 to 12 million dollars a year in additional revenue" (67%) are convincing reasons to support the proposal.

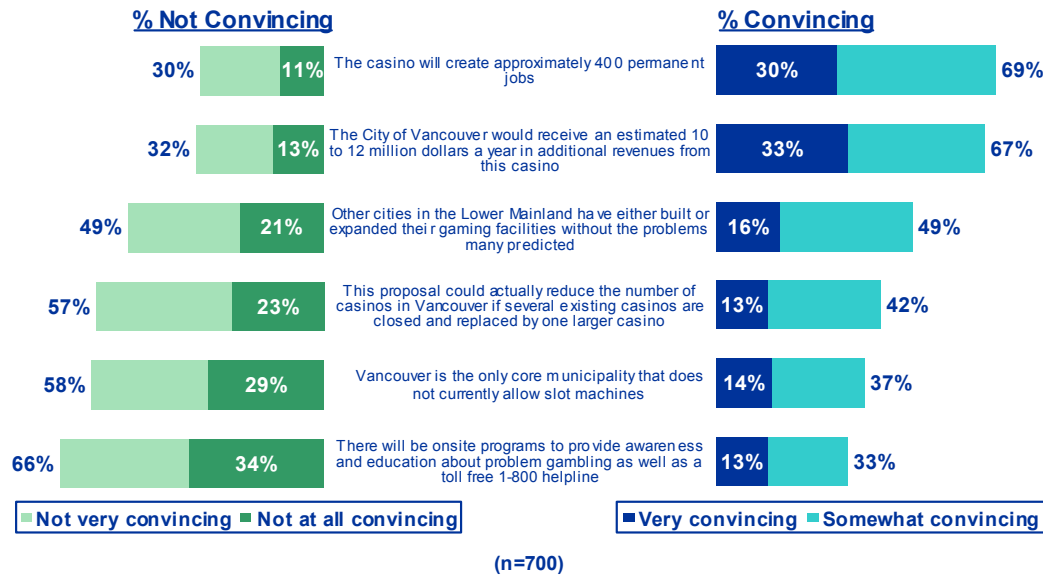
Downtown residents are slightly more likely than other Vancouver residents to say that jobs (76%) and City revenue (72%) are convincing reasons to support the proposal while Hastings-Sunrise residents are slightly less likely to say these two reasons are convincing (65% and 61% respectively).

Meanwhile, residents are divided on whether the fact that "other cities in the Lower Mainland have either built or expanded their gaming facilities without the problems many predicted" is a convincing reason (49%) to support the proposal or not (49%). For each of the other three reasons, more residents say they are not convincing than say they are convincing:

- "This proposal could actually reduce the number of casinos in Vancouver if several existing casinos are closed and replaced by one larger casino" (42% convincing, 57% not convincing)
- "Vancouver is the only core municipality that does not currently allow slot machines" (37% convincing, 58% not convincing)
- "There will be onsite programs to provide awareness and education about problem gambling as well as a toll free 1-800 helpline" (33% convincing, 66% not convincing)

Reaction to Supporting Arguments

"I am going to read you a number of arguments that supporters have made in favour of this proposal. I would like you to tell me whether you find each to be a very convincing, somewhat convincing, not very convincing, or not all convincing reason to support the proposal?"



Focusing in on *residents who currently support* the Plaza of Nations proposal, the most convincing messages in favour of the proposal are:

1. "The City of Vancouver would receive an estimated 10 to 12 million dollars a year in additional revenue from this casino" (95%)
2. "The casino will create approximately 400 permanent jobs" (95%)
3. "Other cities in the Lower Mainland have either built or expanded their gaming facilities without the problems many predicted" (78%)
4. "This proposal could actually reduce the number of casinos in Vancouver if several existing casinos are closed and replaced by one larger casino" (61%)
5. "Vancouver is the only core municipality that does not currently allow slot machines" (61%)
6. "There will be onsite programs to provide awareness and education about problem gambling as well as a toll free 1-800 helpline" (61%)

Focusing in on *residents who currently oppose* the Plaza of Nations proposal, the most convincing messages in favour of the proposal are:

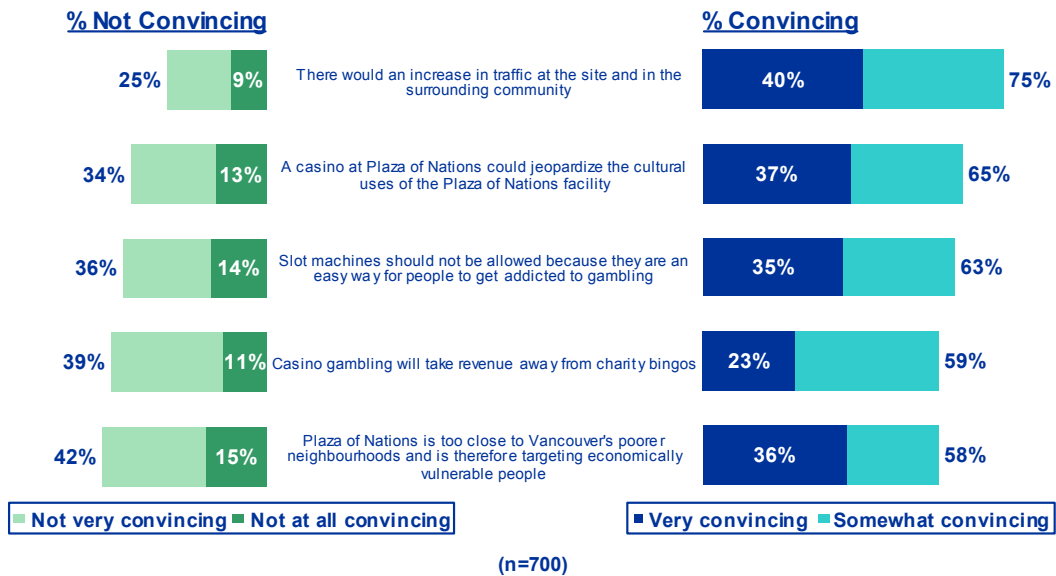
1. “The casino will create approximately 400 permanent jobs” (53%)
2. “The City of Vancouver would receive an estimated 10 to 12 million dollars a year in additional revenue from this casino” (50%)
3. “Other cities in the Lower Mainland have either built or expanded their gaming facilities without the problems many predicted” (30%)
4. “This proposal could actually reduce the number of casinos in Vancouver if several existing casinos are closed and replaced by one larger casino” (30%)
5. “Vancouver is the only core municipality that does not currently allow slot machines” (24%)
6. “There will be onsite programs to provide awareness and education about problem gambling as well as a toll free 1-800 helpline” (17%)

Meanwhile, all of the arguments presented against the proposal are seen by a majority of residents as convincing reasons to oppose the casino. Increased traffic is residents’ paramount concern – 75% say that “there would be an increase in traffic at the site and in the surrounding community” is a convincing reason to oppose. Downtown residents are equally convinced (76%) on this matter. Even a majority of Plaza of Nations supporters see traffic as a compelling reason to oppose the proposal.

Residents also find it convincing that “a casino at Plaza of Nations could jeopardise the cultural uses of the facility” (65%), “slot machines should not be allowed because they are an easy way to get addicted to gambling” (63%), “casino gambling will take revenue away from charity bingos” (59%), and that “Plaza of Nations is too close to Vancouver’s poorer neighbourhoods and is therefore targeting economically vulnerable people” (58%). However, Downtown residents are slightly less likely than other Vancouver residents to find these four arguments convincing.

Reaction to Opposing Arguments

"I am going to read you a number of arguments that opponents have made against this proposal. I would like you to tell me whether you find each to be a very convincing, somewhat convincing, not very convincing, or not all convincing reason to oppose the proposal?"



Focusing in on *residents who currently support* the Plaza of Nations proposal, the most convincing messages against the proposal are:

1. "There would be an increase in traffic at the site and in the surrounding community" (62%)
2. "Casino gambling will take revenue away from charity bingo" (37%)
3. "Slot machines should not be allowed because they are an easy way to get addicted to gambling" (34%)
4. "A casino at Plaza of Nations could jeopardise the cultural uses of the facility" (33%)
5. "Plaza of Nations is too close to Vancouver's poorer neighbourhoods and is therefore targeting economically vulnerable people" (31%)

Focusing in on *residents who currently oppose* the Plaza of Nations proposal, the most convincing messages against the proposal are:

1. "A casino at Plaza of Nations could jeopardise the cultural uses of the facility" (86%)
2. "Slot machines should not be allowed because they are an easy way to get addicted to gambling" (83%)
3. "There would be an increase in traffic at the site and in the surrounding community" (82%)

4. “Plaza of Nations is too close to Vancouver’s poorer neighbourhoods and is therefore targeting economically vulnerable people” (75%)
5. “Casino gambling will take revenue away from charity bingos” (72%)

Methods of Communication

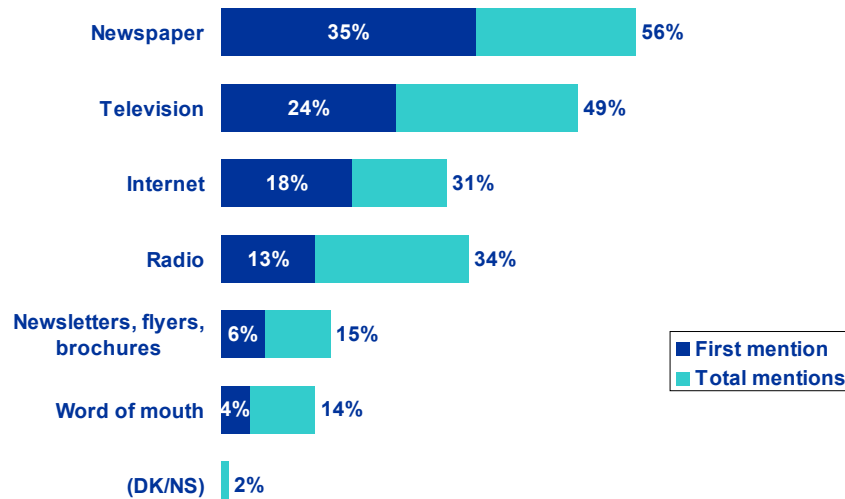
Residents say that newspapers are the medium they are most likely to use to learn more about the Plaza of Nations casino issue. Fifty-six percent of residents would be likely to turn to the paper to learn more (35% list the newspaper as their number one source and 21% as their number two source of information). One-half of City residents (49%) would be likely to turn on their televisions (24% first source, 25% second source) to find out more.

Other popular sources are radio (34% total, 13% first source and 21% second source) and the Internet (31% total, 18% first source and 13% second source). It is interesting to note that while two-in-ten residents say they would be most likely to log on the Internet to keep up to date on the issue, none of the residents that are currently aware of the proposal say that the Internet is their main source of information. This is partly a function of age, as younger residents are significant more likely to prefer using the Internet but also significantly less likely to be aware of the casino proposal. However, it may also point to the fact that the content available online at the City’s webpage and other news portals is currently not sufficient to satisfy users seeking information on the issue.

Residents show less interest in informing themselves through newsletters, flyers, and brochures (15% total) and word of mouth (14% total).

Methods of Communication

“Which of the following methods of communication would you be most likely to use to learn more about the Plaza of Nations casino issue?”



(n=700)

Credibility of Information Sources

Vancouver residents say community and neighbourhood organisations (77% believable) and charitable organisations (75%) are most credible when it comes to speaking about the Plaza of Nations casino issue. Three-quarters of residents say these kinds of organisations are credible while only two-in-ten do not.³

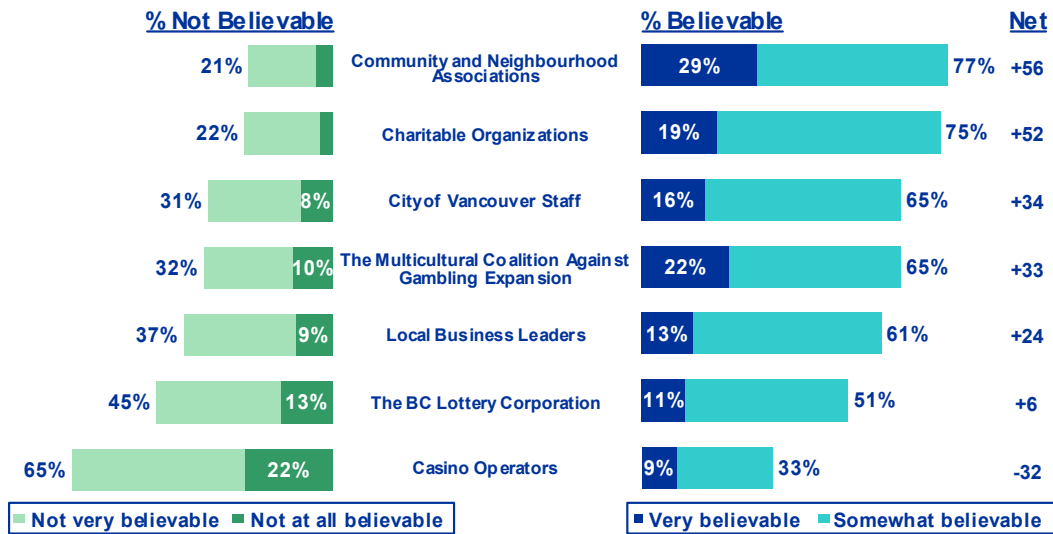
A second tier of trusted groups includes City of Vancouver staff (65% believable, 31% not believable), the Multicultural Coalition Against Gambling Expansion (65% believable, 32% not believable), and local business leaders (61% believable, 37% not believable).

Information from the BC Lottery Corporation (51% believable, 45% not believable) and casino operators (33% believable, 65% not believable) is seen as less credible, most likely because residents see these organisations as the beneficiaries of the proposed casino at the Plaza of Nations.

All organisations have a good profile with no more than 5-6 percent of Vancouverites saying that they are not familiar with a given organization. The one exception is the Multicultural Coalition Against Gambling Expansion with whom 11 percent of Vancouverites say they are not familiar.

Credibility of Information Sources

“Next I’d like to get your views on how credible different sources of information are with respect to the Plaza of Nations casino issue. Would you say that what has/have to say about the issue is very believable, fairly believable, not very believable or not at all believable?”



(n=700 - excluding respondents unaware of item)

³ For this analysis, we have removed those who say they are not aware of a given organization.

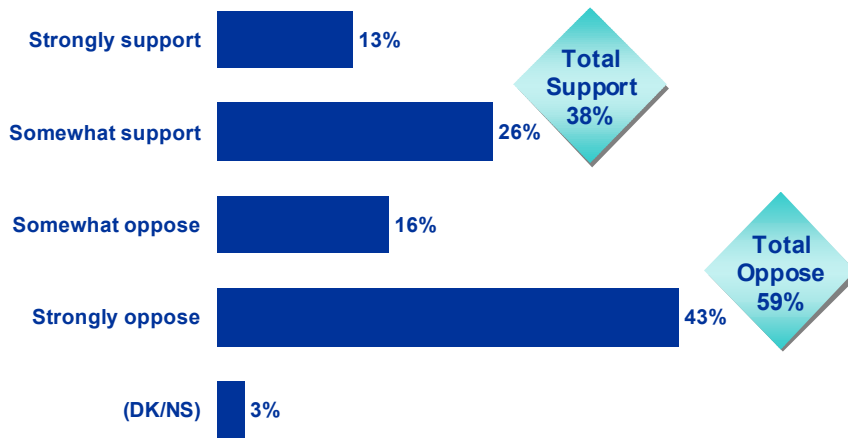
Post-Survey Support

At the end of the survey, residents were once again asked if they supported or opposed allowing a temporary casino at the Plaza of Nations. Responses are very similar to the first sounding – six-in-ten (59%) residents continue to oppose the proposal while four-in-ten (38%) support it. Also, the makeup of the opposition remains more intense than the makeup of the support (43% “strongly oppose” while just 13% “strongly support”).

Support and opposition figures are consistent between soundings both regionally and demographically.

POST - Support for Plaza of Nations Proposal

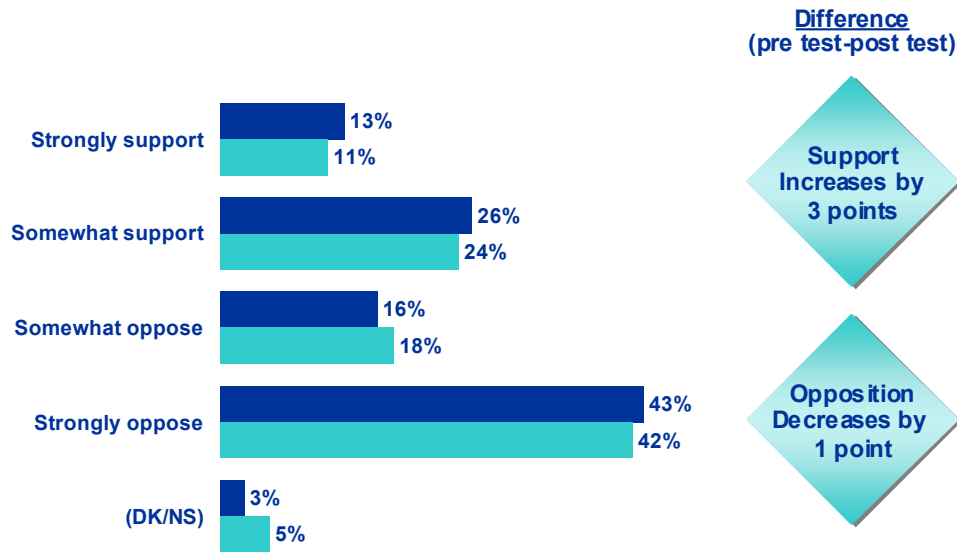
“Now finally, would you say you support or oppose the proposal to allow a temporary casino with slot machines at the Plaza of Nations site?”



(n=700)

Overall support for the Plaza of Nations casino proposal is marginally higher at the end of the survey than at the beginning. Support increased by three points from 35 percent to 38 percent while opposition decreased by one point from 60 percent to 59 percent. Fewer respondents did not offer an opinion at the end of the survey (3%) than at the beginning (5%).

Comparison of Support for Slot Machine Proposal for Plaza of Nations (Pre - Post)



(n=700)

The fact that residents' opinions on the subject do not change after becoming more informed about the subject through the course of the survey and hearing a number of positive and negative arguments suggests that on the whole, the arguments for and against the proposal balance each other out.

Appendix 1 - Gaming Behaviour

Seventy-one percent of Vancouverites have played at least one of the following games in the last 12 months. Lottery tickets are far and away the most widespread type of game played, with two-thirds (67%) of Vancouverites having purchased one in the last year. Playing a slot machine places second at 16 percent followed by table games (11%), and betting on horse races (9%) both at about one-in-ten. In last place, at six percent, is playing Bingo for money.

Games Played in Last 12 Months

