

File No. 04-1000-20-2016-481

December 22, 2016

s.22(1)

Dear s.22(1)

Re: Request for Access to Records under the Freedom of Information and Protection of Privacy Act (the "Act")

I am responding to your request of December 16, 2016 for:

Any communications or lobbying IdeaWorks had with the City from January 1, 2003 to December 31, 2004 when they were advocating for an end to the city's moratorium on slot machines.

We have searched all possible sources for responsive records - no responsive records have been found. The Mayor's Office has informed us that the request for records is too far back for onsite paper records and if there are any records they would be preserved in the Archives. Therefore, Archives were contacted but could only locate a Submission to Vancouver City Council Consideration of City Policy on Slot Machines (June 19, 2003) which does not mention IdeaWorks. I have attached this report for your reference.

Please note: the Mayor's Office also conducted a search in VanDocs as due diligence.

Under section 52 of the Act you may ask the Information & Privacy Commissioner to review any matter related to the City's response to your request. The Act allows you 30 business days from the date you receive this notice to request a review by writing to: Office of the Information & Privacy Commissioner, info@oipc.bc.ca or by phoning 250-387-5629.

If you request a review, please provide the Commissioner's office with: 1) the request number assigned to your request (#04-1000-20-2016-481); 2) a copy of this letter; 3) a copy of your original request for information sent to the City of Vancouver; and 4) detailed reasons or grounds on which you are seeking the review.

Please do not hesitate to contact the Freedom of Information Office at foi@vancouver.ca if you have any questions.

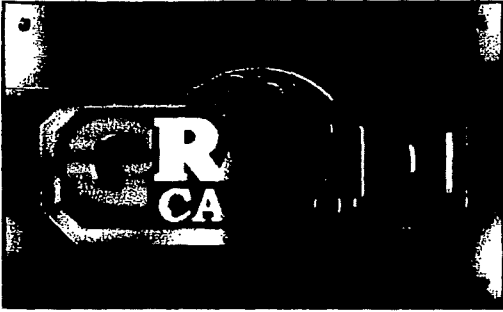
Yours truly,

Cobi Falconer, FOI Case Manager, for
Barbara Van Fraassen

A handwritten signature in black ink, appearing to read "Cobi Falconer". The signature is fluid and cursive, with a large initial "C" and a long, sweeping underline.

Barbara J. Van Fraassen, BA
Director, Access to Information
City Clerk's Department, City of Vancouver

Encl.
:cf



*Project Report on
file at City
clerk's.*

*No return
address*

Mayor Campbell and Members of Council
Vancouver City Hall
453 West 12th Avenue
Vancouver, BC
V5Y 1V4

June 19, 2003

COPIED

Dear Mayor Campbell and Members of Council,

We write to ask Council to approve the addition of slot machines at facilities contracted to operate gaming machines in the City of Vancouver by the BC Lottery Corporation. This policy will provide a fair solution to the economic challenges facing all gaming facilities in Vancouver and ensure public gaming revenues are available to the city to meet its priorities and are not lost to other municipalities.

On March 18th of this year, Council, acting on a request from Hastings Entertainment Inc., asked staff to report on issues relating to a change in City policy that would permit slot machines at the Hastings Racecourse. A policy change of this nature will have significant impacts on the Royal Diamond and Grand Casinos as well as on the city and its citizens. Therefore, we also ask you and your staff to include consideration of these impacts in the report currently being prepared for Council.

Attached, you will find our submission on these impacts and the possible options open to Council as you deal with the racecourse's request. As well, we enclose a study of the economics associated with this issue, produced by Brian Wills, one of Vancouver's leading experts on gaming, particularly racecourse gaming.

We have already indicated that we very much wish to remain in Vancouver. But, the changes in municipalities adjacent to Vancouver mean the competitive environment in which we operate is rapidly changing. This is not only our predicament. The changing environment will make it harder for the racecourse, charity bingos and other gaming facilities to survive, leading to the loss of economic investment and hundreds of jobs as well as reducing civic and charitable revenues.

We support resolving these issues fairly. As our submission shows, options are available that will provide lasting solutions. And they offer a range of socially progressive benefits to the city and its diverse communities. We would very much like to work with City Council and staff to develop these opportunities.

If you have questions or concerns regarding our position or the accompanying materials please do not hesitate to contact us. Thank you for your consideration in this matter.

Sincerely

Len Libin
Len Libin, President
Grand Casino
604-437-1696

Gary Jackson
Gary Jackson, President
Royal Diamond Casino
604-899-1061



Mayor Campbell and Members of Council
Vancouver City Hall
453 West 12th Avenue
Vancouver, BC
V5Y 1V4

June 19, 2003

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Len Libin, President
Grand Casino
604-437-1696

A handwritten signature in cursive script, appearing to read "Gary Jackson".

Gary Jackson, President
Royal Diamond Casino
604-899-1061

**Submission to Vancouver City Council
Consideration of City Policy on Slot Machines
The Royal Diamond and Grand Casinos**

June 19, 2003

The Royal Diamond and Grand Casinos propose a fair solution to the issue of how to address a request for slot machines at Hastings Racecourse, while respecting the rights of existing casinos in the City of Vancouver.

The issues affecting Hastings Racecourse affect all gaming facilities operating in the City of Vancouver. Like the racecourse the Royal Diamond and Grand casinos wish to continue doing business in the City of Vancouver, competing effectively in the Lower Mainland market and contributing jobs, investment and revenues to the City.

Background

On March 18, Council instructed staff to report back on the impacts of changing City policy to allow slot machines at the Hastings Racecourse, while continuing the ban on slot machines at casinos within City limits.

Council was responding to a letter from Mr. Phil Heard, President of Hastings Entertainment Inc, seeking approval for slot machines at Hastings Racecourse. Mr. Heard noted that the addition of slot machines would secure the economic viability of the racecourse along with the jobs the racecourse sustains.

Currently, Provincial policy does not allow slot machines at racecourses, but does allow them in specific casinos. In Vancouver, the Grand and Royal Diamond Casinos have legal agreements with the BC Lottery Corporation permitting gaming machines at their facilities. No other facilities in Vancouver have contracts or rights to slot machines and, under the current provincial cap on licenses and machines, no additional casino licenses will be granted in the city of Vancouver.

Resolving this issue is all the more urgent given recent developments in provincial and municipal gaming policies. In the Lower Mainland, municipal policy changes are resulting in approvals for significant full service facilities in jurisdictions adjacent to Vancouver. As a result, the market disadvantage to all of Vancouver's gaming facilities – the racecourse, charity bingos and casinos – is increasing.

As the market disadvantage increases over time, Vancouver's gaming facilities will decline, move or go out of business. That means job and investment loss as well as a potentially significant decline in civic revenue. Surrounding municipalities will reap those benefits at the expense of Vancouver.

A Fair Solution

The Royal Diamond and Grand Casinos support a City policy that helps address the economic issues facing Vancouver's gaming facilities in a way that is fair to all, delivers benefits to the citizens of Vancouver and respects the contractual rights of existing operators.

A policy that allows slot machines for those parties contracted by the Province to operate gaming machines in Vancouver will:

1. Provide the racecourse with the opportunity to address its economic issues,
2. Address the newly emerging realities of the Lower Mainland market, and
3. Improve the jobs, revenue and benefits associated with Vancouver's gaming facilities.

In conjunction with the provincial cap on casino licenses and slot machines, it will also guard against slot machine proliferation in the city of Vancouver.

The Benefits of A Fair Solution

The solution we propose provides a fair and level playing field for all license holders, and ensures that the Royal Diamond and Grand Casinos can continue to compete in the Lower Mainland market, protecting over 400 jobs at the two facilities. Similar benefits will be available to other licensed facilities, like the racecourse.

New Civic Revenues: \$15.5 million (est.)

An estimated additional \$15.5 million per year in new revenue will flow to the City from our proposal. This revenue will otherwise flow out of Vancouver to nearby jurisdictions offering slot machines alongside casino gaming. This new revenue source opens up significant opportunities to address additional community and council goals.

Recent public opinion research shows that Vancouver's citizens overwhelmingly support using additional gaming revenues to improve neighbourhood amenities and support solutions to social and community issues in the City.

Gaming revenue expenditures strongly supported by Vancouver residents include:

1. Funding to support neighbourhoods like the Downtown Eastside
2. Social Housing
3. Grants to community and charity organizations
4. Grants to childcare, women's and youth organizations
5. Neighbourhood and community programs and amenities

The additional revenue generated by a fair solution will provide the City with an unprecedented ability to direct funds at these and other critical areas determined by Council.

Contribution to Community Opportunities

The Royal Diamond and Grand Casinos recognize that they also have a responsibility to address community issues raised by gaming. The Casinos propose to work with community groups, the charity bingo sector and the City of Vancouver to address three critical impacts of gaming activity in the City: managing neighbourhood impacts through consolidation; protecting the charity bingo sector; and treating problem gaming.

Consolidation

The Royal Diamond and Grand Casinos recognize that fewer locations properly designed help reduce neighbourhood impacts and problem gaming. Revenue from gaming machines will enable the two casinos to develop a plan, in discussion with the City and the BC Lottery Corporation, to consolidate operations in an appropriate location. This would serve to lessen impacts on residential neighbourhoods like South Vancouver.

Charity Bingo

Charity bingos located in the City of Vancouver provide significant revenues to local and provincial charitable groups. These revenues are already threatened by expansion of full service casinos in adjacent municipalities. The Royal Diamond and Grand Casinos believe that experience in jurisdictions such as Winnipeg shows that, with gaming machines, charity bingo and casino markets can be compatible in the City of Vancouver. The Royal Diamond and Grand Casinos have already started working with the charity bingo sector to develop a facility model that supports a stronger charity bingo operation.

Problem Gaming

Studies show that slot machines, carefully controlled in limited, well-designed locations, do not increase the incidence of problem gaming. In fact, consolidating locations, and providing well designed facilities can make the identification of and contact with problem gamblers easier. The Royal Diamond and Grand Casinos will work with the City of Vancouver and the Province of BC to develop and implement more programs to effectively reduce problem gaming.

Jobs and Investment

Gaming machines will allow the Royal Diamond and Grand Casinos to compete in the emerging Lower Mainland market. New gaming machines will mean new jobs and new revenues for the City. The additional activity at the existing Casinos will fund facility investments in on-site amenities.

Consolidation of facilities would require a major capital investment in the City of Vancouver. Similar investments in other Canadian jurisdictions have been in the range of \$60 - \$100 million. The provision of new entertainment amenities and construction of consolidated facilities would both create significant employment opportunities. Construction and operational jobs will be created, along with opportunities for training and employment for marginalized workers.

The Grand and Royal Diamond Casinos will work with City staff to develop training and employment programs to complement City initiatives in the Downtown Eastside and amongst marginalized groups.

Conclusion: City Policy Options

There are three options available to the City in its consideration of the impacts of changing City policy to allow slot machines at the Hastings Racecourse while continuing the ban on slot machines at Casinos.

1. *The City can maintain the status quo.*

This, combined with the ongoing expansion of gaming in neighbouring communities, will result in the continued decline of all gaming facilities in the City of Vancouver. Casinos that can move will do so. Facilities like the racecourse, some casinos and charitable bingos will move, fail or survive as far smaller entities. There will be a significant negative impact on jobs, investment and civic and charitable revenues.

2. *The City can adopt a policy allowing slot machines for all parties contracted by the BC Lottery Corporation to operate gaming machines in Vancouver.*

This will allow the racecourse to deal with its economic issues, and provide the opportunity for significant revenue, job, investment and community enhancements to the citizens of Vancouver. The cap on casino licenses and slot machines ensures no additional casino facilities contracted to operate gaming machines in the City of Vancouver.

3. *The City can support slot machines at the racecourse while continuing the ban on slot machines at casinos.*

Currently, provincial policy does not allow slot machines at racecourses, but does allow them at Casinos. In Vancouver, the Grand and Royal Diamond Casinos have legal agreements with the BC Lottery Corporation permitting slot machines at their facilities, but the City does not allow slot machines. No other facilities have contracts or rights to slot machines.

In the face of decisions that allow another facility to “jump the queue” and install slot machines in place of or ahead of the Grand and Royal Diamond facilities, the principals of those facilities have a duty to protect their contractual rights. This will create a legal obstacle to the resolution of the racecourse’s economic issues. Jobs and revenue offered by the racecourse will continue to be in jeopardy.

Recommendation

The Royal Diamond and Grand Casinos recommend that the City adopt a policy allowing slot machines for all parties contracted by the BC Lottery Corporation to operate gaming machines in Vancouver.



Lynnpeaks Consulting Ltd.
Certified Management Consultants

Project Report

RESPONSIBLE MACHINE GAMING MODEL FOR THE CITY OF VANCOUVER

Prepared for
ideaworks

2633
mlc/cw
Dir Soc. Admin-
response
AM CSG

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I Highlights

On March 10, 2003, Mr. Phil Heard, the President & CEO of Hastings Entertainment Inc. (HEI) wrote a letter to the City of Vancouver, asking the Council to approve the addition of slot machines at Hastings Racecourse. The purpose of this report is to examine the financial implications and job impacts for the City of the options with respect to machine gaming.

At the time the resolutions banning slot machines were passed, incomplete information was available on the potential impacts of machine gaming in Greater Vancouver. Historically many residents have been concerned about the impact of expanded gaming or the availability of casinos on the incidence of problem gamblers.

In March 2003 the Ministry of Public Safety and the Solicitor General released the "British Columbia Problem Gaming Prevalence Study" dated March 12, 2003. The study demonstrated there is no correlation between the availability of casinos or machine gaming equipment and the incidence of problem gamblers.

Introduction of machine gaming in surrounding municipalities has been successful. Since the time of these resolutions several new casinos with slot machines have been built in surrounding municipalities including the Burnaby Casino operated by Gateway Casinos and the Coquitlam Casino operated by Great Canadian Casinos. The actions of neighbouring municipalities have negated the relevance of the existing policy. Within the GVRD, there exist 4 casinos that contain 1,069 gaming machines that Vancouver based gamblers can easily access and over the next 24 months additional gaming machines will be coming on line based on Lower Mainland market demand.

Due to the availability of machine gaming in surrounding municipalities, the City of Vancouver's current policy prevents any of the financial benefits accruing to the City but machine gaming is fully accessible to the majority of the residents of the City.

The Province of British Columbia and the British Columbia Lottery Corporation have created a policy to consolidate casinos in Greater Vancouver. The result of these provincial policies is that only two casinos in Vancouver, Royal Diamond Casino and the Grand Casino are eligible to receive an allocation of slot machines from BCLC.

Currently City Council is only considering the approval of slot machines at Hastings Racecourse. By only allowing slot machines at the track and not the 2 casinos the potential financial benefits to the City of Vancouver are limited as shown in Section IV of this report.

There are three possible policy options that Council can pursue at this time:

1. Continue the existing Ban on Machine Gaming.
2. Allow Machine Gaming at Hastings Racecourse and the two Casinos that are contracted by the Province to operate Gaming Machines in Vancouver.
3. Allow Machine Gaming at Hastings Racecourse but not at Casinos in Vancouver.

Presented below is a summary of the financial implications of the three options. The approval of slot machines at Hastings Racecourse in addition to the 2 eligible Casinos (option 2) produces the superior financial result. The remaining term of the contracts for the two casinos is 17 years. The \$264 million produced over the 17 year period is sufficient to fund major capital projects or social programs.

Summary of the Financial Implications to the City of Vancouver

	Option 1	Option 2	Option 3 ¹
Annual Net Revenue Position	<u>\$(1,024,300)</u>	<u>\$15,548,429</u>	<u>\$3,131,100</u>
Net Revenue Position over 17 years with no growth assumption	<u>(\$17,413,800)</u>	<u>\$264,323,000</u>	<u>\$53,228,400</u>

Presented below is a summary of the job gains/losses of the three options. The approval of slot machines at Hastings Racecourse in addition to the 2 eligible Casinos (option 2) produces the only significant job gains.

Summary of the Job/Gains/Losses to the City of Vancouver

	Option 1	Option 2	Option 3 ²
Estimated Number of FTE's Gained/(Lost)	(800)	315	(345)
Estimated Payroll Impact \$' 000's	(26,000)	8,200	(9,100)
Estimated Number of Employee Positions Effected	(1,260)	530	(555)

In summary, option 2 produces the best benefits for the City of Vancouver including significant revenues and job growth. The other 2 options allow gaming revenues to flow to other Lower Mainland municipalities from the City of Vancouver.

¹ See section V - B for caveats.
² See section VI - B for caveats.

II Introduction

On March 10, 2003, Mr. Phil Heard, the President & CEO of Hastings Entertainment Inc. (HEI) wrote a letter to the City of Vancouver, asking the Council to approve the addition of slot machines at Hastings Racecourse. At the March 25th, 2003 meeting of City Council, the following resolution was passed:

That staff report back to Council on the impacts of a change in City policy to maintain the ban of slot machines in casinos but to allow them at the race track and including more information on:

- *The provincial government's decision making timelines;*
- *The social and economic costs of gaming;*
- *The impact of an effective transfer of gaming activity away from neighborhoods to a single location such as the track;*
- *Further information on employment gains claimed by the race track operators as well as specific proposals under consideration, including where liquor would be sold in such a facility;*
- *The potential consequences for charities in the City, and*
- *The social and economic costs associated with introducing slots to the community.*

The purpose of this report is to examine the financial implications and job impacts for the City of the options with respect to machine gaming. The report provides useful information to support the Council's request for additional information.

In the past, the City of Vancouver Council has opposed the implementation of machine gaming on several occasions including:

On March 25, 1997, Council reiterated its demand to the Provincial Government for a comprehensive Gaming Act before expanded gaming activity goes forward. Council further advised the Minister of Municipal Affairs and the Minister of Employment and Investment that Vancouver opposed the addition of slot machines as an expanded gaming option.

On October 7, 1997, Council adopted amendments to the Zoning and Development By-law to permit a limited number of charity-operated casinos in certain areas of the city and to prohibit casinos with slot machines. The amendment prohibiting casinos with slot machines was challenged by the B. C. Lottery Corporation and the City successfully defended the By-law in the B.C. Supreme Court and Court of Appeal.

To enable the Hastings Racecourse to have slot machines the City Council must re-examine the rationale for the current ban on slot machines. The following addresses this issue:

1. The slot machine ban was imposed when information on gaming impacts was incomplete

At the time the resolutions banning slot machines were passed, incomplete information was available on the potential impacts of machine gaming in Greater Vancouver. Many concerns were expressed by Council members and residents regarding the Province's plan for expanded gaming.

Historically many residents have been concerned about the impact of expanded gaming or the availability of casinos on the incidence of problem gamblers. In March 2003 the Ministry of Public Safety and the Solicitor General released the "British Columbia Problem Gaming Prevalence Study" dated March 12, 2003. The study demonstrated there is no correlation between the availability of casinos or machine gaming equipment and the incidence of problem gamblers. Presented on Exhibit II-1 are results demonstrating the effect.

**Exhibit II-1
SOGS (Southern Oaks Gaming Screen) Among Past Year Gamblers**

	BC 2002 n=(2134)	BC 1996 n=(736)	BC 1993 (n=1122)
Not at risk	76.8%	75.7%	80.2%
Low risk	19.4%	20.5%	16.0%
Problem gambler	2.8%	2.7%	2.6%
Probable pathological gambler	1.1%	1.1%	1.2%

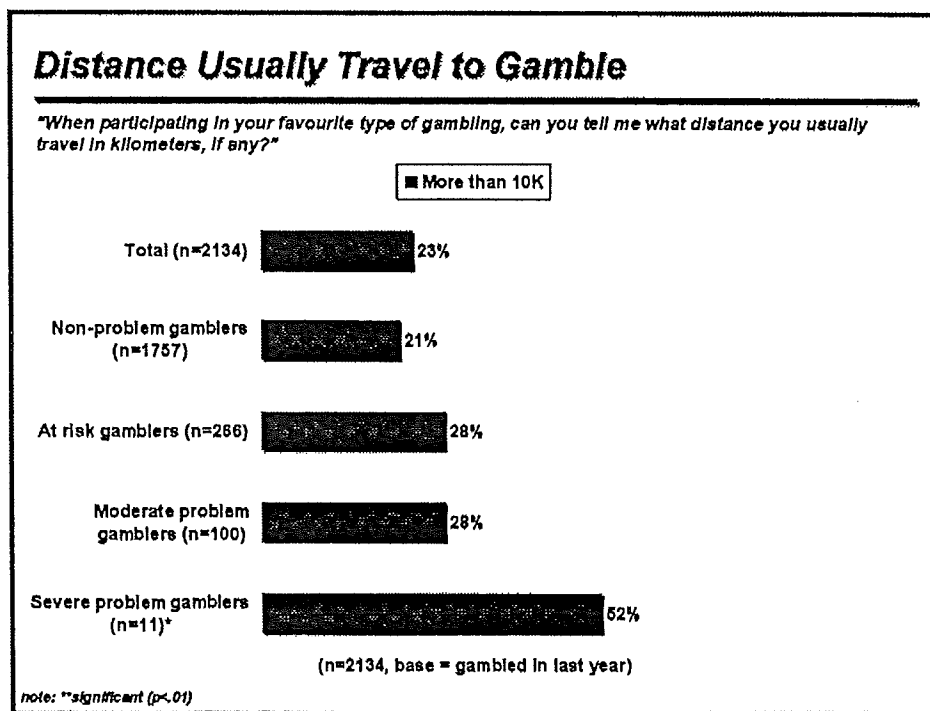
The conclusion reached is consistent with other studies and historical problem gaming rates in British Columbia.

2. Introduction of machine gaming in surrounding municipalities has been successful

Since the time of these resolutions several new casinos with slot machines have been built in surrounding municipalities including the Burnaby Casino operated by Gateway Casinos and the Coquitlam Casino operated by Great Canadian Casinos. The slot machine revenue for these two casinos for the year ending March 31, 2003 exceeded \$120 million.

Due to the location of these two casinos along Trans-Canada No. 1, they are accessible to a significant portion of the residents of the City of Vancouver. Both municipalities have realized significant financial gains from allowing machine gaming into their municipalities. Due to the availability of machine gaming in surrounding municipalities, the City of Vancouver's current policy prevents any of the financial benefits accruing to the City but machine gaming is fully accessible to the majority of the residents of the City.

The recent gaming study³ by the Province demonstrates that problem gamblers are prepared to travel more than non-problem gamblers to participate in gaming as shown on the table below from the report. Therefore the current City policy banning machine gaming does not achieve the objective of preventing problem gamblers, they will just travel to other municipalities.



³ British Columbia Problem Gambling Prevalence Study - March 12, 2003 issued by the Gaming Policy and Enforcement Branch

The experience to date of the casinos in the surrounding municipalities as verified by police reports are that casinos are free of prostitution and major crimes and have limited or no impact on neighbourhoods. The provincial gambling addiction program has received a small number of requests from the operation of these facilities. We understand these issues will be dealt with in more detail in the staff report from the City of Vancouver.

3. BCLC will only allow machine gaming at two casinos

Due to the current City of Vancouver policy prohibiting machine gaming, BCLC has considered transferring two service provider contracts out of the City and moving them into municipalities that are interested in offering machine gaming. BCLC will not transfer these two service provider casino contracts to a racetrack. Racetracks will only be allowed slot machines and electronic games ("racinos"). The two service provider contracts are held by the Royal Diamond Casinos Inc. and Grand Casino Equipment and Management Ltd. representing the Royal Diamond Casino and the Grand Casino.

There is no certainty that BCLC or surrounding municipalities will be able to move these service provider contracts out of the City of Vancouver. Both Royal Diamond Casino and Grand Casino have stated on several occasions that they would prefer to stay within the City of Vancouver if possible. In a recent decision, BCLC awarded the Langley Casino opportunity to Gateway Casino that will move their service provider contract from the City of New Westminster into the City of Langley. Both the Grand Casino and Royal Diamond Casino applied for the Langley opportunity.

The Province of British Columbia and the British Columbia Lottery Corporation have created a policy to consolidate casinos in Greater Vancouver. As part of the agreement to award Great Canadian Casino a new location in Richmond, Great Canadian has agreed to close down the Renaissance Casino located on Hastings Street. In addition, they have agreed that the Holiday Inn will not be allowed an allocation of slot machines should the City of Vancouver rescind their ban. BCLC has a policy that the Mandarin casino will not be allowed slot machines at any time in the future. The result of these provincial policies is that only two casinos in Vancouver, Royal Diamond Casino and the Grand Casino are eligible to receive an allocation of slot machines from BCLC.

4. Track Only Approach Limits the Benefits to the City

Currently City Council is only considering the approval of slot machine at Hastings Racecourse. By only allowing slot machines at the track and not the 2 casinos the potential financial benefits to the City of Vancouver are limited as shown in Section IV of this report. BCLC has determined there should be a limited number of machine gaming locations in the City of Vancouver. Approval of slots at the racetrack and only 2 casinos in the City of Vancouver meets the requirements of BCLC and the objectives of a responsible machine gaming policy for the City of Vancouver.

III Market Areas

To understand the effect of machine gaming policies, a brief discussion of market areas is useful. Presented on Exhibit III-1 is a map showing the location of existing and potential machine gaming locations and their primary market areas. Primary market areas exist within 15-20 minutes driving time. A recent gaming study⁴ demonstrated that 66% of gaming patrons in BC travel less than 5 km to a casino.

BCLC has a policy of allocating casinos to market areas thus preventing several casinos in one market area resulting in market saturation. Casinos do not have monopolies but exist in a regulated marketplace by BCLC.

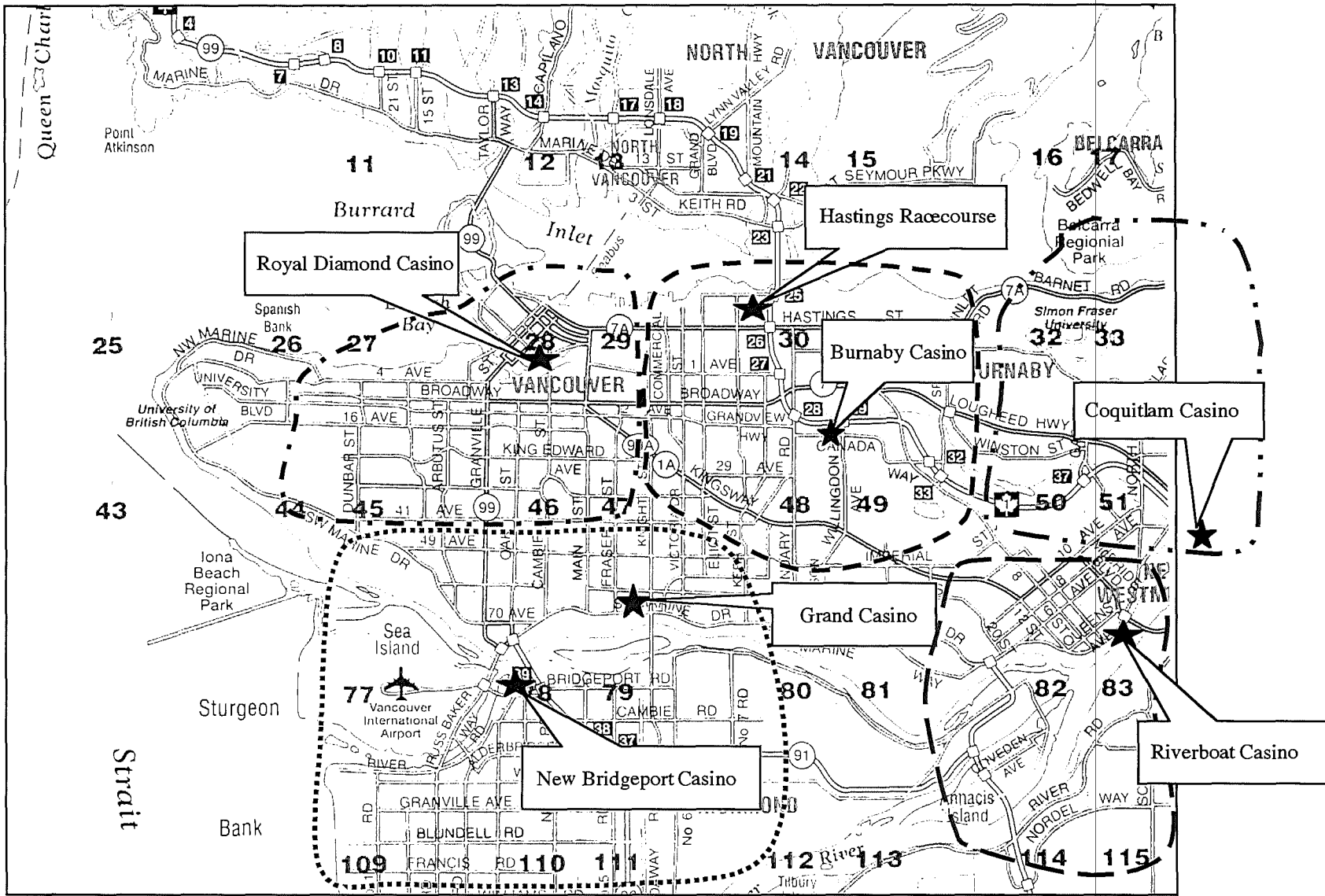
The Hastings Racecourse and the Burnaby Casino participate in the overlapping markets of East Vancouver and Burnaby. The projection of the financial returns contained in section IV of this report recognizes this overlap. BCLC will likely take this into account when they allocate machines to the racetrack allowing 300-400 machines rather than the 1,000 machines requested.

The Grand Casino in its current south Vancouver location will not be able to compete against the new Bridgeport Casino that will serve Richmond and South Vancouver. The owner of the Grand Casino will desire to relocate his casino given the opportunity to offer machine gaming. The Renaissance Casino in downtown Vancouver is scheduled to close when the new Bridgeport Casino in Richmond opens.

The Royal Diamond Casino is in an excellent location for the market areas of central core of Vancouver and the west side areas. The Royal Diamond Casino does not compete in the primary market area for the Hastings Racecourse. The Royal Diamond Casino location from a demand point of view due to geography could accommodate more than the 300 machines allowed under its service provider contract.

⁴ British Columbia Problem Gambling Prevalence Study - March 12, 2003 issued by the Gaming Policy and Enforcement Branch

**Exhibit II-1
Machine Gaming Casino Market Areas**



City of Vancouver FOI Request #2016-481

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IV Financial Impacts of Machine Gaming Options

A. Overview

In 1997 the City of Vancouver banned the introduction of slot or gaming machines at casinos located within the City boundaries. The basis for this ban appears to have been the City Council's concern over potential negative impacts on crime, low income individuals/families and gambling addiction.

Neighbouring municipalities (Burnaby, Coquitlam and New Westminster) have since 1997 allowed machine gaming and other municipalities (Richmond, Surrey and Langley) have recently approved the introduction of machine gaming within their municipalities. Presented on Exhibit IV-1 are the revenues from gaming to local municipalities for the year ending March 31, 2003. Appendix A contains a complete listing of all revenues from gaming to local governments in BC for the year ending March 31, 2003 and 2002.

As a result of the ban against machine gaming, the City has enjoyed lower revenues from its five casino locations than have some of its neighbours, particularly on a population per capita basis. Should the policy remain in place, this differential is likely to increase significantly when machine gaming commences in Richmond, Surrey and Langley.

Exhibit IV-1 Local Government Revenue from Gaming

Municipality	Population per 2001 census	Local Government Revenue from Gaming 2002/03 \$	Gaming Revenue Per Population of Municipality \$
Burnaby	193,954	\$5,968,075	30.77
Coquitlam	112,890	\$5,091,652	45.10
New Westminster	54,656	\$6,364,362	116.44
Richmond*	164,345	\$2,185,020	13.30
Vancouver*	<u>547,641</u>	<u>\$3,955,897</u>	<u>7.22</u>
Aggregate	<u>1,073,486</u>	<u>\$23,565,006</u>	<u>21.95</u>

* Municipalities that did not allow Machine Gaming during this period.

To date, empirical evidence does not support the contention that gambling and machine gaming will significantly increase criminal activity within the GVRD. In a recent public opinion survey, 99% of respondents did not see 'crime' as being an important reason to continue the ban on machine gaming.

The actions of neighbouring municipalities have negated the relevance of the existing policy. Within the GVRD, there exist 4 casinos that contain 1,069 gaming machines that Vancouver based gamblers can easily access and over the next 24 months additional gaming machines will be coming on line based on Lower Mainland market demand.

There are three possible policy options that Council can pursue at this time:

1. Continue the existing Ban on Machine Gaming.
2. Allow Machine Gaming at Hastings Racecourse and the two Casinos that are contracted by the Province to operate Gaming Machines in Vancouver.
3. Allow Machine Gaming at Hastings Racecourse but not at Casinos in Vancouver.

For the following options we have used conservative assumptions on the potential revenues from machine gaming. Other reports may use higher estimates of revenues but the estimates contained in this report are based upon the most likely result.

B. Options for Generating Gaming Revenue for the City of Vancouver

Option 1 - Continue the Ban on Machine Gaming in Vancouver

Currently the following casinos are contracted to operate gaming tables within the City of Vancouver:

Casinos within the City of Vancouver	Revenue to the City in 2001/02	Actual Revenue to the City in 2002/03
	\$	\$
Grand Casino	923,881	1,024,344
Holiday Inn Casino	1,277,865	1,485,254
Mandarin Centre	749,422	885,124
Renaissance Casino	498,234	561,175
Royal Diamond Casino	<u>152,223</u>	
Total	<u>3,601,625</u>	<u>3,955,897</u>

In an agreement between BCLC and Great Canadian Casinos Ltd, the Vancouver Renaissance Casino will cease operations when the new Richmond Casino opens. This means that the City can anticipate a reduction in its revenues from table gaming.

Both the Grand Casino, located on S. E. Marine Drive and the Royal Diamond Casino, located in the Plaza of Nations, are approved by the Provincial Government to operate gaming machines but do not because of the City's ban on this form of gambling.

In the medium to longer term it is probable that, unless Council removes this ban, both of these operators will, with the support of BCLC, move their operations to municipalities that will permit them to operate gaming machines in addition to gaming tables. Such moves will result in loss of revenue to the City of \$1,024,300 per year and of course the loss of many Vancouver based jobs.

If the City of Vancouver continues the machine gaming ban the residents of Vancouver will use the new Bridgeport Casino in Richmond and the Burnaby Casino resulting in major revenue losses to the City. The new casinos with improved premises in adjoining jurisdictions will have a further impact on existing gaming revenues to the City of Vancouver.

Hastings Racecourse, the Provinces primary horse racing facility has for several years, experienced declining attendance and on track betting handle. Recently, Hastings Entertainment Inc., the racetrack operators requested that the City (that is also the owner and landlord of the racetrack property) to agree to the installation of 1,000 gaming machines at the racecourse. The City is currently reviewing this request. Failure to accommodate the race course operators request may cause either the transfer of thoroughbred horse racing to another jurisdiction that will accommodate gaming machines or ultimately the cessation of live horse racing at Hastings Park. The loss of racing will eliminate the current \$750,000 paid under the lease agreement. Again, both scenarios will result in lost revenue to the City and the loss of a significant number of Vancouver based jobs.

The total loss to the City of continuing the present policy is potentially greater than \$1.8 million per year.

Option 2 - Allow Machine Gaming at Hastings Racecourse and Eligible Casinos

Option 2 allows machine gaming at Hastings Racecourse and at the 2 Casinos that are contracted by the Province to operate Gaming Machines in Vancouver. According to a recent public opinion survey, Vancouver "residents overwhelmingly support a policy that is fair to all existing gaming facilities". Less than 20% of residents support a policy that permits Hastings Racecourse alone to add gaming machines to its mix of games. Sixty percent of residents support a policy that allows existing casinos and the track to place gaming machines in their facilities.

Two of the five casinos contracted to operate within the City of Vancouver are approved by the BCLC to operate gaming machines. These are the Royal Diamond Casino and the Grand Casino. Under existing BCLC policies this represents an additional 600 gaming machines that could be located within the City outside of Hastings Racecourse.

Exhibit IV-2 contains an estimate of the incremental revenues to the City of Vancouver based on 600 gaming machines, located within the City at sites that would not compete significantly with Hastings Racecourse. The Burnaby and the Coquitlam casinos achieved, in 2002/03, an "average win per machine per day" of \$585 and \$520 respectively. Both of these casinos are close to the City of Vancouver and have comparable market demographics to Vancouver. Gaming machines located at suitable sites in Vancouver should experience similar levels of daily revenues to those being achieved in Burnaby and Coquitlam, particularly as these locations currently benefit from patronage of Vancouver residents. By locating the machine gaming casinos in Vancouver, the Vancouver customer base is retained and revenues stay in the community.

Using these parameters, 600 gaming machines, excluding those at Hastings Racecourse, will generate new revenue for the City exceeding \$7 million per annum.

In combination with revenue produced by the gaming machines at Hastings Racecourse, the City should receive \$15.5 million per annum.

Exhibit IV-2

Revenue to the City of Vancouver of Machine Gaming at Hastings Racecourse and Eligible Casinos

Machine Gaming

Number of Gaming Machines at the Casinos	600
	\$
Average win per Machine per Day of	550
Annual Net Win	120,450,000
Projected additional revenue to the City of Vancouver per annum*	<u>8,672,400</u>

Add:

Projected additional revenue from Gaming Machines at Hastings Racecourse	4,155,429
Projected additional revenue to the City of Vancouver per annum*	<u>12,827,829</u>

Table Gaming

Number of Table Games at the Casinos	60
Average win per Day	3,000
Annual Net Win	65,700,000
Gross Table Contribution	3,744,900
Less existing Grand Casino Contribution	1,024,300
Projected additional revenue to the City of Vancouver per annum*	<u>2,720,600</u>

Grand Total - Slots and Tables - Additional Revenue to the City of Vancouver **\$15,548,429**

* Based on a revenue sharing formula applied by BCLC.

Option 3 - Allow Machine Gaming at Hastings Racecourse but not at Casinos in Vancouver

Hastings Entertainment Inc., the operators of Hastings Racecourse have requested the City's approval for 1,000 gaming machines. However, assuming Council approves this request it is unlikely that the BCLC will invest that many machines in one location, particularly with the Burnaby Casino being in very close proximity to the racecourse. Based on its existing policies, BCLC is likely to provide 300-400 units to the racecourse and 400 machines was used in estimating the economic benefits to the City that is discussed below.

Because of their respective locations the Burnaby Casino and the racecourse will share the same market base to a large extent. This does not mean, however, that the aggregate of Burnaby's existing gaming machine revenue would now be shared by the two casino operations. To this existing revenue, growth should be expected for the following reasons:

1. Hastings Racecourse already has a solid base of gaming orientated patrons and experience at other racetracks has revealed that there is a substantial transfer of horse racing patrons' activity to gaming machines if these are installed in an existing racetrack. In fact as many as 74% of Edmonton's Northlands Park horse racing patrons visit the machine gaming room at least once during the course of a year.
2. Many horse racing patrons attend racing events without their spouses or partners. Again experience at other racetracks has demonstrated that racing patrons are much more likely to have their spouses accompany them if there are gaming machines available to entertain them.
3. There are likely potential patrons in the Hastings Racecourse market area that wish to play gaming machines but who do not attend the Burnaby Casino for various reasons, including transport/transit, distance and the competition for gaming machines at the casino. These individuals would find gaming machines located at Hastings Racecourse more accessible and convenient for their lifestyles.
4. Gaming machines at the Burnaby casino are often operating at capacity and the casino is not able to fully satisfy the demand from patrons wishing to gamble but not able to for the lack of an available gaming machine.

Within the GVRD, the 2002/03 average win per machine per day at casinos operating gaming machines ranged between \$300 to \$585, depending upon the casino. The overall average was \$446 per machine per day.

Exhibit IV-3 contains an estimate of the incremental economic benefit to the City of Vancouver based on 400 gaming machines, located at Hastings Racecourse, achieving an average win per machine per day of approximately \$395. The result is below the average for the GVRD but this is due to the proximity to the Burnaby Casino that was factored into the estimate.

If the racetrack location is approved for machine gaming, residents of East Vancouver will patronize this location for machine gaming. However residents of south Vancouver and the west side of Vancouver will likely use the new Bridgeport Casino in Richmond resulting in lost revenue opportunities for the City of Vancouver.

The revenue (on market maturity – normally within two years of opening) from machine gaming to the City of Vancouver based on this estimation is \$3.1 million per annum.

The revenue above is subject to the following caveats:

- Provincial government policy must be changed to allow slot machines at racetracks.
- The revenue formula for gaming at racetracks is unresolved.
- Machine gaming at the racetrack alone is contingent upon legal action.
- The number of slot machines to be allocated to the racetracks has yet to be determined.

Exhibit IV-3
Calculation of Return to the City from the Hastings Racecourse

	Number of Machines	Annual Slot Net Win \$	Average Win per Machine per day \$
Burnaby Casino - 2002/03	300	\$64,000,000	584.47
Hastings Racecourse Pro rate share of existing Annual Win	400	36,571,429	250.49
Adjust for estimates of:			
Spillover effect from racing patrons.			
Annual # of patrons at Hastings Racecourse	400,000		
Penetration percentage	45.00%		
Therefore # of gaming patrons	180,000		
Estimated average spend per patron	\$50.00		
Additional gaming machine win		9,000,000	61.64
Spousal impact of racing patrons.			
Estimate number of patrons with spouse	25%		
Therefore number of spouses	100,000		
Percentage of spouses gaming	75%		
Estimated average spend per spouse	\$40.00		
Additional gaming machine win		3,000,000	20.55
Additional market penetration resulting from greater capacity and convenience			
Conservatively estimated at	25%		
		9,142,857	62.62
		<u>\$57,714,286</u>	<u>395.30</u>
Projected additional revenue to the City of Vancouver per annum*		\$4,155,429	
Less loss from Grand Casino moving		<u>\$1,024,344</u>	
Net Additional Revenue to the City of Vancouver per annum*		<u><u>\$3,131,085</u></u>	

* Based on a revenue sharing formula applied by the BCLC.

C. Summary of Revenue Options

Presented on Exhibit IV-4 is a summary of the financial implications of the three options. Included in the table is the impact over a 17 year period, showing the funds available of \$264 million could support major capital projects and social programs in the City of Vancouver. The remaining term of the contracts for the two casinos is 17 years. The approval of slot machines at Hastings Racecourse in addition to the 2 eligible Casinos (option 2) produces the superior financial result.

Exhibit IV-4

Summary of the Financial Implication to the City of Vancouver

	Option 1	Option 2	Option 3 ⁵
Annual Net Revenue Position	<u>\$(1,024,300)</u>	<u>\$15,548,429</u>	<u>\$3,131,100</u>
Net Revenue Position over 17 years with no growth assumption	<u>(\$17,413,800)</u>	<u>\$264,323,000</u>	<u>\$53,228,400</u>

⁵ See caveats in Option 3, page 18

V Job Gains and Losses of Machine Gaming Options

A. Overview

Council's decision as to whether to remove the ban on Gaming Machines in Vancouver has potentially significant financial implications for those organizations which have been approved by the BCLC to operate machine gaming in the City of Vancouver.

For several years Hastings Racecourse has experienced declining on track attendance and revenues. These declines threaten not only the financial stability of the racecourse operator but also that of the whole horse racing industry which employs numerous individuals whose job skills outside of the industry are very limited. Should Council vote to continue the ban on gaming machines it may cause either the transfer of thoroughbred horse racing to another jurisdiction that will accommodate gaming machines or ultimately the cessation of horse racing at Hastings Park. Either scenario will result in the loss of a significant number of Vancouver based jobs.

Several other horse racing jurisdictions in North America have saved jobs and created additional employment opportunities by the introduction of a casino, specifically gaming machines, into their operations and revenue base. Prime examples in Canada include Woodbine Raceway in Toronto, Windsor Raceway in Ontario and Northlands Park in Alberta. Prairie Meadows Racetrack in Iowa, USA is often cited as an example of a bankrupt horse racing organization that became extremely viable as a result of a government allowing gaming machines at the racetrack. This policy also resulted in a financial windfall for the controlling government and the local community.

Both the Royal Diamond Casino and the Grand Casino have been approved to operate gaming machines by the BCLC. Without a change in Council's policy, it is highly probable, in order to survive, that both these operators will pursue an alternative municipality in which they will be able to optimize their revenues through gaming machines. Any such transfer of operations will impact negatively on Vancouver based jobs and job opportunities.

However, should Council decide to reverse the ban on gaming machines in Vancouver, the racetrack and the two casinos would likely remain in the City for the foreseeable future, not only retaining existing jobs, but also creating new employment opportunities through new gaming machine operations.

Summarized below are estimates of job gains and losses to the City of Vancouver, together with direct payroll implications, based on the following options:

1. The ban on Machine Gaming is continued in Vancouver.
2. Machine Gaming is allowed at Hastings Racecourse and the two Casinos contracted by BCLC to operate Gaming Machines in Vancouver.
3. Machine Gaming is allowed at Hastings Racecourse but not at Casinos in Vancouver.

B. Jobs Gains/Losses from Machine Gaming Options

Option 1 - Continue the Ban on Machine Gaming in Vancouver

Presented on Exhibit V-1 is the estimate of the jobs lost from the continuation of the ban on machine gaming.

Exhibit V-1

Jobs lost by continuing the ban on machine gaming

	Estimated Number of FTE's Gained/(Lost)	Estimated Payroll* Impact \$' 000's	Estimated Number of Employee Positions Effected
Hastings Racecourse ceases operations or transfers to another municipality	(375)	(15,000)	(570)
The Grand and Royal Diamond casinos transfer to other municipalities	(425)	(11,200)	(690)
Aggregate	(800)	(26,200)	(1,260)

* Excludes gratuities and benefits.

Option 2 - Allow Machine Gaming at Hastings Racecourse and Eligible Casinos

Presented on Exhibit V-2 are the job gains if machine gaming is allowed at Hastings Racecourse and the two Casinos contracted by BCLC to operate gaming machines in Vancouver. Option 2 provides the largest gain in job positions and estimated payroll impact. A total of 315 FTE's or 530 positions are created.

**Exhibit V-2
Jobs Gained/Lost by permitting machine gaming at Hastings Racecourse and the 2 Casinos**

	Estimated Number of FTE's Gained/(Lost)	Estimated Payroll* Impact \$' 000's	Estimated Number of Employee Positions Effected
New Gaming Machine operations at Hastings Park Racecourse	80	2,100	135
New Gaming Machine operations at approved Casinos	235	6,100	395
Aggregate	315	8,200	530

* Excludes gratuities and benefits.

Option 3 - Allow Machine Gaming at Hastings Racecourse but not at Casinos in Vancouver

Presented on Exhibit V-3 are the jobs gained/lost by allowing machine gaming at Hastings Racecourse. Although there is a gain of employment at Hastings Racecourse the loss of jobs due to the transfer of the two casinos is greater resulting a net loss of 555 employee positions. This effect is created largely because table gaming is more labour intensive than machine gaming.

Exhibit V-3

Jobs Gained/Lost by permitting machine gaming at Hastings Racecourse

	Estimated Number of FTE's Gained/(Lost)	Estimated Payroll* Impact \$' 000's	Estimated Number of Employee Positions Effectuated
New Gaming Machine operations at Hastings Park Racecourse	80	2,100	135
The Grand and Royal Diamond casinos transfer to other municipalities	(425)	(11,200)	(690)
Aggregate	(345)	(9,100)	(555)

* Excludes gratuities and benefits.

The job gains/losses above are subject to the following caveats:

- Provincial government policy must be changed to allow slot machines at racetracks.
- The revenue formula for gaming at racetracks is unresolved.
- Machine gaming at the racetrack alone is contingent upon legal action.
- The number of slot machines to be allocated to the racetracks has yet to be determined.

C. Summary of Job Options

Presented on Exhibit V-4 is a summary of the Jobs Gained/Lost of the three options. Notable is that 70% of the employees of the Royal Diamond Casino are residents of Vancouver. Therefore the majority of jobs in Vancouver casinos are residents of the City of Vancouver, not surrounding municipalities.

Exhibit V-4

Summary of the Jobs Gained/Lost to the City of Vancouver

	Option 1	Option 2	Option 3 ⁶
Estimated Number of FTE's Gained/(Lost)	(800)	315	(345)
Estimated Payroll Impact \$' 000's	<u>(26,200)</u>	<u>8,200</u>	<u>(9,100)</u>
Estimated Number of Employee Positions	<u>(1,260)</u>	<u>530</u>	<u>(555)</u>

⁶ See caveats in Option 3, page 25

VI Application of Gaming Funds in other Lower Mainland Jurisdictions

Listed below are other municipalities within the Lower Mainland that receive or have received revenues from gaming activities within their jurisdiction and how they utilize the funds so received. The majority of the revenues received are used to meet normal budget expenses thereby maintaining a lower level of tax rates or a higher level of services.

Municipality	Funds Application
Burnaby	Held in reserve for special projects.
Coquitlam	75% towards enhancing capital projects. 25% towards non-profit and charitable grants.
New Westminster	No specific allocations. Funds are included in general revenues.
Richmond	Used to help meet normal budget costs.
Surrey	50% towards capital costs relating to cultural and recreational projects. 25% towards other capital projects. 25% towards normal budget costs.

Appendix A - Revenue to Local Governments

Local Government Share Of Provincial Casino Revenue		
Location And Name Of Casino	Apr 1, 2001 – Mar 31, 2002	Apr. 1, 2002 – Mar 31, 2003
Burnaby • Gateway Burnaby Casino	\$6,273,689	\$5,968,075
Coquitlam • Coquitlam Casino (opened October 2001)	\$2,279,559	\$5,091,652
Cranbrook • Casino of the Rockies * (opened September 2002)	—	\$475,422
Kamloops • Lake City Casino	\$1,287,846	\$1,560,339
Kelowna • Lake City Casino	\$1,597,954	\$2,000,920
Nanaimo • Nanaimo Casino	\$2,680,151	\$2,338,382
New Westminster • Royal Towers Casino • Royal City Star Riverboat *	\$1,841,855 \$4,741,303	\$1,867,693 \$4,496,699
Penticton • Lake City Casinos Ltd. *	\$1,584,126	\$1,876,778
Prince George • Casino Hollywood	\$1,398,834	\$1,480,149
Quesnel • Billy Barker Casino	\$548,982	\$583,840
Richmond • Richmond Casino	\$1,956,888	\$2,185,020
Vancouver • Grand Casino • Holiday Inn Casino • Mandarin Centre • Renaissance Casino • Royal Diamond Casino (closed July 15, 2001)	\$923,882 \$1,277,865 \$749,422 \$498,234 \$152,223	\$1,024,344 \$1,485,254 \$885,124 \$561,175 —
Vancouver Total	\$3,601,626	\$3,955,897
Vernon • Lake City Casino	\$995,755	\$1,241,201
Victoria • Mayfair Casino (relocated to View Royal, December 2002)	\$280,576	—
View Royal • View Royal Casino (opened December 2002)	\$881,446	\$3,068,208
Wells • Jack'o' Clubs Gaming Hall * (Seasonal operation – June to September)	—	\$32,381
Total Municipal Share Of Casino Revenue	\$31,950,590	\$38,222,656

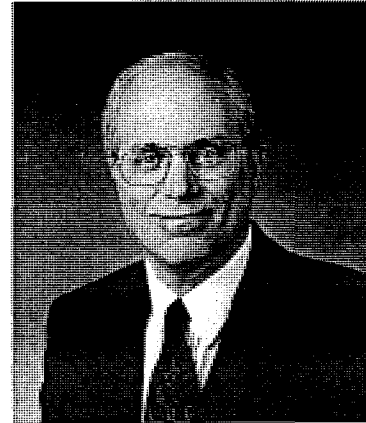
Note:

- Host local governments receive **one-tenth** of the revenue generated by **community casinos** located in their jurisdiction.
- Host local governments receive **one-sixth** of the revenue generated by **destination casinos** located in their jurisdiction. Asterisk (*) denotes a destination casino.

Appendix B - Biography of the Author

Appendix B - Biography of Author - Brian Wills, CMC

Brian Wills is President of Lynnpeaks Consulting Ltd. and is a Certified Management Consultant (CMC). He has over 20 years of experience in management consulting and has worked for both Arthur Andersen and KPMG.



Brian has specialized in the tourism/gaming industries for the last twenty years. He has performed extensive work for racetracks, casinos, resorts, and convention centres. He has prepared economic impact studies, market and financial viability studies, valuations, operational studies and general management assistance.

Sample engagements include:

He has conducted numerous studies for the **BC Racing Commission** and is familiar with all aspects of thoroughbred and standardbred horse racing. A proposal call was conducted for a one mile thoroughbred racing track for Vancouver for the Ministry of Attorney General. The proposals received were reviewed and a successful proponent was selected. Mr. Wills was the project manager of a site selection study for a new horse racing facility. This study included an analysis of traffic needs, soil requirements, sewer and water needs and municipal planning issues. Mr. Wills worked with the Board of Directors of the **Pacific Racing Association** in 1994 to take over the operations of Exhibition Park in Vancouver. He acted in the capacity of General Manager and Controller for the first two months of operations.

He has prepared several market and financial analysis for casinos including the proposal for the New Westminster Riverboat Casino, **The Royal City Star**. An application for a new casino was prepared for the relocated **Pacific National Exhibition** in response to the request for proposal by the PNE. The initial stages of a market study were performed for the owner of the Grand Casino to support relocation of the casino. The study was cancelled due to rejection of the project by the Vancouver City Council. Mr. Wills worked with VLC Properties on the proposal for a major Las Vegas style casino – Seaport Centre - for downtown Vancouver. This included travelling to the Mirage Casino in Las Vegas to review their operations and discussion with senior management. He has performed gaming studies in Alberta, Yukon and British Columbia.

Mr. Wills is Past-President of the Board of Directors of Mountain Equipment Co-operative, a retail outdoor equipment co-operative and Past-President of the Institute of Certified Management Consultants of British Columbia.