

## **Gaming Market Overview – Metro Vancouver’s South of the Fraser Region**

As the Crown Corporation responsible for gaming in British Columbia, BCLC routinely assesses markets in conjunction with a third-party firm with extensive expertise in the international hospitality, tourism and leisure industries.

Our market analysis indicates that players in the South of the Fraser region of Metro Vancouver are underserved by nearby facilities, and that a new facility would be attractive to our players.

As an initial step in determining interest amongst local governments to host a new gambling facility, BCLC initiated an Expression of Interest (EOI) process in June 2016 with the City of Surrey, Corporation of Delta and Tsawwassen First Nation. BCLC concluded the EOI process in November 2016 and selected the Corporation of Delta as its preferred host local government for a potential new gambling and entertainment facility.

Determining potential for a gambling facility is a detailed process that looks at a variety of factors, including existing play statistics, revenue potential, population size, proximity to other gaming facilities and socio-economic factors.

The identified market area has approximately 460,000 adult residents and two gambling facilities: Elements Casino (previously Fraser Downs) and Newton Bingo Country.

Our analysis shows that a new facility could generate between \$25 million to \$50 million in incremental gambling revenue; this would result in an annual Host Local Government payment of approximately \$1.5 million to \$3 million. A Host Local Government of a gaming facility receives 10 per cent of the net gaming income that its facility earns.

BCLC respects the authority of local governments to choose whether they want a gaming facility and will only consider pursuing development in communities where host local governments have indicated an interest. Once a Host Local Government is identified, a detailed facility proposal may be submitted to the municipality for approval. All facility proposals will require the local government to seek and consider adequate community input.

For further information:

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