



Submission by
West Dunbartonshire Council
for a
Regional Casino



CASINO ADVISORY PANEL

Formal Proposal Cover Sheet

Please fill in *all* categories below:

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West Dunbartonshire Council

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Title: Chief Executive

Statement of basis of application:

What exactly are you proposing? Please make clear which type of casino you **primarily** wish to be considered for.

Regional Yes/No Yes

Large (state number) No

Small (state number) No

If this proposal is unsuccessful what if any is your fall back/ second proposal?

Large (state number) No

Small (state number) No

EXECUTIVE SUMMARY

This is a Proposal for the location of a regional casino in the West Dunbartonshire local authority area. West Dunbartonshire Council (**WDC**) is the local planning authority and will be the authority authorised to grant the requisite licenses under the Gambling Act 2005.

In making this Proposal WDC has received support and input from Scottish Enterprise Dunbartonshire (**SED**) which is the local enterprise company for the area, part of Scottish Enterprise, the economic development agency for lowland Scotland created by the Enterprise & New Towns (Scotland) Act 1990. This support included provision of a social impact study, economic impact study and public consultation carried out by independent consultants and market research organisations.

The data quoted and referred to in this report are derived from the source materials and studies listed in Annexure 1 commissioned by SED.

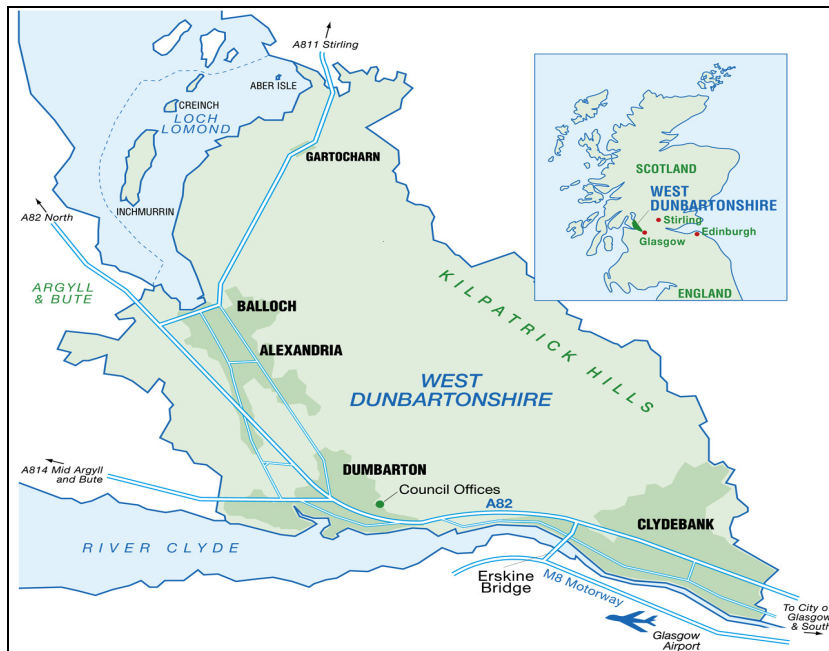
The key features of WDC's Proposal can be summarised as follows:

- The West Dunbartonshire area lies between the **Greater Glasgow conurbation** to the east and the stunning scenery of **Loch Lomond and Trossachs National Park** to the west. Both are within a 20 minute journey. Glasgow International Airport is 15 minutes away via the Eskine Bridge which has now had tolls lifted by the Scottish Executive in order to help to stimulate economic regeneration.
- The Proposal envisages that a regional casino would be only one component of a **significant tourism and leisure destination resort**, to include a major high quality hotel, a convention centre, and family leisure and sports facilities. This would involve significant investment, and result in additional activities on site for visitors, while the proximity of Loch Lomond will encourage onward visitation to this world-renowned tourist destination.
- The West Dunbartonshire area **benefits from excellent transport links** by road, rail, water and air which are unrivalled in Scotland for a development of this type.
- Locating the regional casino and resort outside the City Centre means **risks of problem gambling would be minimised** because, for the vast majority of visitors a dedicated trip to gamble would be required.
- West Dunbartonshire offers a choice of sites of sufficient size, which would be ideal locations for a development of this scale. They comprise brownfield land in need of remediation where **existing planning policies would support the development** of a regional casino and other tourism/leisure facilities.
- West Dunbartonshire and adjacent areas have a **significant pool of available labour** and a robust framework within which programmes for training and increasing employability for local people presently take place.
- Recent consultation demonstrates **strong support from the local population** and business organisations.
- The area is included within an initiative for the **regeneration of the River Clyde corridor**, supported and funded by the Scottish Executive, Scottish Enterprise and the Regional Structure Plan Authority.
- This proposal has a **high degree of probability of implementation** with support from a major casino operator.

SECTION 1: CONTEXT

1.1 The Area

- 1.1.1 Stretching from the outskirts of Glasgow to the banks of Loch Lomond, West Dunbartonshire is an area of outstanding natural beauty. However, it is also an area of considerable need. Since the 1970s West Dunbartonshire has suffered the largest loss of manufacturing jobs in percentage terms of any local authority area in Scotland through the collapse of shipbuilding, marine engineering, and other industries. (The closure of the Singer sewing machine factory in Clydebank, for example, led to the loss of 12,000 jobs.) In place of these industries is a regeneration strategy based around the River Clyde and Loch Lomond with a business focus on tourism, light engineering, whisky distilling, and related consumer businesses.



- 1.1.2 West Dunbartonshire is part of the Glasgow metropolitan area, with rapid and regular connectivity to a much larger market. Central Glasgow is 20 minutes away by express train service. Glasgow International Airport and Glasgow Prestwick Airport are 15 and 45 minutes away by car respectively. West Dunbartonshire is also adjacent to the stunning scenery of the Loch Lomond & Trossachs National Park.
- 1.1.3 Some 1.37 million adults live within one hour of the proposed development site. A further 1.23 million adults live more than one hour away but can be considered as part of the regional demand for the proposed casino.

1.2 The Population

- 1.2.1 West Dunbartonshire is home to around 91,000 people (2001 Census), of which 62% are of working age. Ethnic minorities form a very small fraction of the population, with 0.5% from the rest of Europe and 1.09% from outwith the European Union.

1.2.2 Key population characteristics include:

- 17,721 of all houses are rented, almost all are social housing. This represents 43% of the entire housing stock.
- 14,000 of all households receive council tax benefit and over 10,000 also receive Income Support or Job Seekers Allowance. Numbers on Income Support are the third highest in Scotland. They constitute a large local target market for re-employment. (*West Dunbartonshire Social and Economic Profile 2004*).
- Over 7,000 people receive incapacity benefits and are also a target market for employment.
- Unemployment and incapacity levels are above national averages. One-third of the unemployed have been so for more than six months.
- Deprivation levels are high: over a third of the population live in the areas categorised by the Scottish Executive as being at the highest level of deprivation. (*Scottish Index of Multiple Deprivation, Scottish Executive, 2004*.)
- Educational attainment is below the Scottish average (e.g. only 29% achieving five or more passes or better by end of S4 compared with 34.6% nationally). (*West Dunbartonshire Social and Economic Profile 2004*).

1.3 Tourism and Tourism Strategy

1.3.1 West Dunbartonshire is part of the Argyll, Loch Lomond and Forth Valley Tourism Partnership. The partnership drives a co-ordinated approach to tourism development across a wide area.

1.3.2 The Partnership aims to achieve the national target for growth in tourism of 50% in value and 20% in numbers by 2015. A key driver of growth is the **Destination Loch Lomond strategy (DLL)**, which aims **“to facilitate and encourage a first class international destination that represents an outstanding urban fringe and an international gateway to Loch Lomond and the Highlands”**.

1.3.3 WDC strongly supports the DLL strategy in order to redress the historic decline in manufacturing jobs.

1.3.4 At present there is a relative lack of sustainable visitor attractions within the West Dunbartonshire area, which is perceived to be a constraint to growth in visitor numbers and length of stay.

1.3.5 Siting a regional casino in the West Dunbartonshire area, together with a major hotel and a first class family entertainment sports and leisure complex, would support the DLL strategy in two ways:

- Visitors to the National Park will be attracted to the regional casino and other facilities in the complex before continuing their journey; and,
- Visitors taking a city break will be attracted to Glasgow as a destination with the regional casino and other facilities only 20 minutes away.

1.3.6 Tourist infrastructure development is underway in the Loch Lomond area. At one end of the spectrum is the investment by De Vere Group in a spa resort on Loch Lomondside to complement its existing five-star hotel. In addition, Loch Lomond Shores, a public / private funded development of 100 acres of derelict land at the south end of Loch Lomond has, since opening in 2002, attracted in excess of 1 million visitors annually.

1.3.7 Smaller-scale tourism assets such as hotels and guest houses have also seen investment in recent years. Occupancy of existing accommodation facilities grew significantly between 1999 and 2004 (by 8% to 73%), as did the number of establishments grading above the Scottish average. (*West Loch Lomond Area Tourist Accommodation Overview 2004*).

1.3.8 Currently, 63% of visitors to the area are from Scotland and 77% are aged 35 and over. This confirms that the tourism market is dominated by day visitors with limited ability to stay and spend.

1.3.9 The Tourism Partnership Action Plan endorses a strategy focusing on quality and sustainability. The location of a regional casino with a major hotel, convention centre, and family leisure and sports facilities within West Dunbartonshire would underpin the regeneration initiatives that are already underway and assist in achieving the aims of the Destination Loch Lomond strategy and the Tourism Partnership Action Plan.

1.4 Regeneration policy

1.4.1 As mentioned in section 1.1.1, in the past 3 decades, West Dunbartonshire suffered the biggest fall per capita in manufacturing employment of any local authority area in Scotland. Major job losses have been caused by the withdrawal of large manufacturers and the decline and closure of the shipyards.

1.4.2 WDC has a policy of addressing local employment and industrial scarring by creating other quality job opportunities. A key element of the strategy adopted by WDC and SED along with Community Planning and other partners is that economic regeneration would be led by the creation of jobs and training opportunities in the tourism and hospitality industry. If successful, this Proposal would result in a very significant one-off investment in tourism infrastructure – not just in a casino, but in the other elements of the planned resort, including hotel, convention centre, sports centre and family leisure facilities. Coupled with the expected growth in visitation which the designation of the National Park generates, the development of these major tourism assets in West Dunbartonshire, and the readiness of an experienced operator to run them, will allow these strategic goals to be achieved in the optimum time frame.

1.4.3 A casino-based destination development is viewed as a natural extension of existing WDC / SED regeneration policy. By capitalising on the area's natural assets, including Loch Lomond, a resort development including a regional casino would be a major driver of regeneration in West Dunbartonshire.

1.5 The testing of social impact

1.5.1 West Dunbartonshire sits between Glasgow and Loch Lomond. Its boundary is co-terminus with Glasgow City in the east and terminates at the gateway of the Loch Lomond and Trossachs National Park. **A regional casino, hotel and family entertainment destination would provide a visitation offer for both residents in the Glasgow metropolitan area and visiting tourists in a managed location outwith an area of major population.**

- 1.5.2 Recent audits confirm West Dunbartonshire as an area highly dependent on public sector employment, with low levels of entrepreneurship (*Dunbartonshire business structure and analysis – Experian Business Strategies 2005*) and a distinctly lower level of wealth and educational attainment (*West Dunbartonshire Social and Economic Profile 2004*). A similar position in relation to the wider Glasgow metropolitan area was confirmed in 2005 (*Metropolitan Glasgow Economic Audit – TERU, University of Glasgow*). These studies provide clear baselines for measuring the impact of development.
- 1.5.3 The relatively detached location of the available sites provides an ideal platform for effective measurement of social impact.

SECTION 2: SOCIAL IMPACT

2.1 Effects on social cohesion and the sustainability of communities

- 2.1.1 For the vast majority of visitors to a regional casino and hotel / entertainment resort in West Dunbartonshire, a dedicated trip to gamble would be required. Since the proposed development also envisages a large scale hotel and family entertainment complex, WDC believes that the careful planning of support services and a location remote from major population centres allows impacts on social cohesion and sustainability of communities to be minimised.
- 2.1.2 Recognising that a regional casino development has not yet been delivered in the UK, WDC commissioned an impact study from specialist industry consultancy Responsible Gambling Solutions (**RGS**) to provide advice on the potential social impacts of such a development. It is envisaged that a framework of guidelines, recommended in the report, will emerge to control the gambling operations.
- 2.1.3 Part of the work undertaken by RGS was to review potential sites and identify those with the lowest risk of negatively affecting social cohesion and community sustainability.
- 2.1.4 **The informed view, shared by GamCare, the gambling support charity, RGS and Professor Peter Collins of Salford University's Centre for Gambling Studies, is that regional casino developments should be sited so as to require a dedicated trip to gamble – and this is a key feature of West Dunbartonshire's bid. All the sites for potential development require a dedicated trip by road, rail, or river, to access the casino resort complex from major population centres.**
- 2.1.5 West Dunbartonshire has no history of widespread problem gambling. It has very few gambling establishments: no casinos, 22 betting shops and two bingo halls. The immediately adjacent area of West Glasgow has a number of betting shops, five bingo halls and seven traditional casinos. To mitigate potential issues of problem gambling, as part of the planning and licence process, WDC would seek a commitment to provision of funding to provide education and awareness programmes as to the risks associated with gambling.

2.1.6 Finally, the local police authority has also confirmed that they would have no objection in principle to the location of such a development in West Dunbartonshire. Their experience indicates that there is no consistent correlation between casino development and an increase in crime or disorder, and the police would seek to assist the development during the planning stage by providing advice on matters such as traffic management and security.

2.2 Alcohol and gambling

2.2.1 Alcohol dependency is a key concern of WDC. WDC Social Work department's Alcohol and Drugs Forum has considered the impact of a casino in the area and following advice from RGS, a comparison would be undertaken of the availability of gambling, its perceived impact and the prevalence of problem gambling within the region before and after the opening of a regional casino. Further information and comparisons will be drawn from the National Gambling Prevalence Study 2006 when published.

2.2.2 WDC recognises the risks around the provision of alcohol and gambling together. To address this, WDC would limit the availability of alcohol within the casino. Measures could include bans on free alcohol, bans on alcohol at the point of gambling and bans on alcohol on the gaming floor itself.

2.2.3 A key part of the sought for protection would be the provision, by the casino operator, of a subsidy to allow WDC Social Work Department to devote resources to address the issues of problem gambling and alcohol dependency.

2.3 Policies and procedures to counter negative and optimise positive social impacts

2.3.1 A statement of intent would be obtained that requires the gambling operator not only to act with propriety and adhere strictly to the Gambling Commission's Codes of Practice on social responsibility but to initiate extra safeguards. One of these will be a requirement to provide areas where inexperienced gamblers can practise before joining the gaming floor, in order to help people stay in control of gambling behaviour.

2.3.2 Additionally, the operator would require to have in place policies and procedures that will ensure the local population and all visitors to the casino understand the risks of gambling and where, within their local area, they can seek help if concerned. There will also be an expectation that the casino operator contributes to developments designed to optimise positive social cohesion

2.4 Testing for changes in social impacts

2.4.1 The comparative survey outlined in 2.2.1 above partly addresses this point. Additionally, WDC would establish appropriate arrangements to monitor closely all impacts of the development. The casino operator will also be required to establish a committee of social responsibility to address and take action on any concerns that may arise.

2.5 Comparable initiatives in place to manage social impacts from other activities

- 2.5.1 The most comparable initiatives that have been put in place in West Dunbartonshire are those relating to alcohol. Gambling and alcohol consumption share a similar legitimacy within society. They are both legal and popular social activities embedded within local communities. Equally both can, when taken to excess, have devastating consequences on families and cause enormous social problems. Whilst the approach to social problems caused by addictive behaviour has a common thread, each dependency requires separate nuances within the treatment and harm minimisation strategies.
- 2.5.2 The response by the Council, and that of voluntary organisations, to alcohol related issues provides a workable framework for action on gambling problems. This would lead to the development of a multi-agency gambling strategy designed to address any issues arising from a regional casino development.

2.6 Existing and planned job creation and training programmes

- 2.6.1 WDC and SED have a highly successful track record of job creation through training programmes. Despite the area having suffered the highest level of manufacturing job losses of any local authority area in Scotland, working with various agencies including the local Further Education colleges, this partnership has assisted in reducing the level of unemployment by more than the Scottish average. The partnership currently operates through the Dunbartonshire Local Economic Forum Employability Subgroup, comprising WDC, SED, Job Centre Plus and local businesses and also through the West Dunbartonshire Community Planning Partnership.
- 2.6.2 WDC, as part of the planning and licensing process, would seek agreement that jobs are offered to local people in the first instance. Working with the proposed operator, SED and WDC would assist in this condition by providing customised training programmes to meet the new demand.
- 2.6.3 Working with the proposed operator, SED would develop a suite of tailored training programmes and also use its national training programmes, Training for Work (for the adult unemployed) and Skillseekers (for young people), to provide the labour pool with the appropriate skill levels for the development. A major increase is foreseen in the current activities of programmes dedicated to the hospitality industry, including;
- the National Training Award-winning programme, Working In Tourism and Hospitality (WITH); and,
 - Springboard – a national programme to encourage careers in the hospitality industry.

In addition, WDC and SED would work with a new Clydebank College, currently under construction, to develop appropriate courses as part of its new curriculum.

- 2.6.4 To avoid full displacement in the labour market arising from a major recruitment initiative for the casino development, WDC would work to retrain those currently excluded from the labour market. SED would also work with local businesses to assist them in meeting purchasing requirements of the casino development and thus achieve major economic growth through supply chain procurement. WDC, as part of the planning and licensing process, would seek agreement that a policy of local purchasing is introduced.
- 2.6.5 SED would also work with WDC and the operator to undertake major skills audits to link the skills required to the economic profile of the area and identify gaps in skill levels to be addressed by customised training programmes.

2.7 Relationships with other bodies that support social impact policies

- 2.7.1 In addition to monitoring the social impact of the regional casino, WDC would work to achieve greater co-ordination and cohesion between local organisations that deal with the consequences of 'hidden addiction' in their work with clients. WDC recognises that problem gambling affects families as well as individuals, and believes that organisations dealing with families should be aware of the abuse that can be suffered by both adults and children at the hands of a problem gambler. Existing local bodies and support groups such as the West Dunbartonshire Alcohol and Drugs Forum and Gamblers Anonymous are well positioned to disseminate knowledge on this issue and promote effective action by relevant agencies.

SECTION 3: THE NEED FOR REGENERATION

3.1 Current regeneration activity

- 3.1.1 Parts of West Dunbartonshire are currently participating in two Scottish Executive sponsored regeneration initiatives, one in Clydebank as part of the Clyde Waterfront Initiative and the other within the Loch Lomond and Trossachs National Park.

Clydebank Rebuilt is the development body charged with delivering the **Clyde Waterfront Initiative** in Clydebank. It was chosen as one of the pathfinder Urban Regeneration Companies to be formed in Scotland and has a planned investment level in excess of £240M between 2003 and 2010, £165m of which is to be funded by the private sector.

Clydebank Rebuilt's key targets over the 10 years of the plan include creating a new college and further education facility; creating net employment growth of 3667 jobs; treatment and reinstatement of over 200 hectares of land, (of which 61 hectares will be business space and 76 hectares housing); and generating additional GDP of £103m per annum.

The **Loch Lomond and Trossachs National Park**, founded in 2002, is Scotland's first national park. Through its strategy document, the National Park Plan, it has devised a strategy for conservation and sustainable development in the National Park area. Experience around the world confirms that designating an area as a National Park generates significant increases of up to 30% in visitor numbers and in associated economic activity.

3.1.2 Since the development would create a significant tourist and leisure destination in a location not currently benefiting from regeneration activity and since it would encourage more people to visit West Dunbartonshire and stay longer, the proposal would support the objectives of both the Clyde Waterfront Initiative and the economic development objective of the Loch Lomond and Trossachs National Park. It would thus play a key part in West Dunbartonshire's overall regeneration strategy.

3.2 Economic Impact

3.2.1 Economic Impact of Resort Construction

The construction of the regional casino with a hotel, convention centre, and family leisure and sports facilities would be one of the largest construction projects undertaken in the West of Scotland. A recent study by EKOS Limited shows that constructing these facilities at a forecast cost of £438M over a three-year period would provide a major boost to the construction economy of West Dunbartonshire, Scotland, and the local economies of the Glasgow Metropolitan areas, generating the following outputs:

- Between 5,893 and 8,841 construction job-years in West Dunbartonshire and Scotland, respectively which will;
- Generate £165.1M of Gross Value Added (GVA) in West Dunbartonshire and £247.7M of GVA in Scotland.

3.2.2 Economic Impact of Ongoing Operation

The same study shows that year-on-year operation of the facilities would, (based on operator projections of 3.15m visits per annum):

- Create approximately 2,000 FTE jobs on-site, and around £103 million in GVA through wages and salaries paid to these employees;
- Create a total of 3,305 gross full time equivalent (FTE) jobs and 2,555 net FTE jobs in the West Dunbartonshire economy (after addition of supplier and income multiplier factors to on site employment), and generate a total of £170 million in gross GVA and £132 million in net GVA annually for the West Dunbartonshire economy;
- Create a total of 3,584 gross full time equivalent (FTE) jobs and 1,040 net FTE jobs in the Scottish economy after addition of supplier and income multiplier factors, and generate a total of £184 million in gross GVA and £92 million in net GVA annually for the Scottish economy. (*Report by Ekos Limited – March 2006*)

3.3 Additional economic value

3.3.1 In addition to the direct economic impact of the development, the creation of a tourism destination is anticipated to generate significant additional impacts through increased off site visitor spend as follows;

- A total of 642 gross full time equivalent (FTE) jobs and 482 net FTE jobs in the West Dunbartonshire economy and generate a total of £26 million in gross GVA and £19 million in net GVA annually for the West Dunbartonshire economy;
- Create a total of 2,185 gross full time equivalent (FTE) jobs and 965 net FTE jobs in Scotland and generate a total of £88 million in gross GVA and £39 million in net GVA annually for the Scottish economy.

3.4 Regeneration of particular parts of the area

3.4.1 WDC expects that a regional casino with hotel, convention centre, and family leisure and sports facilities would contribute significantly to the priorities set out in the Regeneration Outcome Agreement (ROA) of the West Dunbartonshire Community Plan. The ROA sets out how partner organisations will tackle social, economic, and physical regeneration in West Dunbartonshire and includes the targets of:

- Getting people into work
- Raising educational attainment and
- Building strong, safe and attractive communities.

3.4.2 The proposed development directly addresses these three targets.

3.4.3 Local regeneration, to be most effective, involves early engagement from the local authority and other agencies. This would take place through prioritising local recruitment, dedicated training programmes for local employees, and policies and actions on safety within the development. These would include voluntary gambling controls, restrictions on availability of alcohol, restrictions on access to the gambling areas, high levels of security, and investment in gambling support groups.

3.5 The multiplier effect

3.5.1 The proposed development would have a significant multiplier and spin off impact on the local and national economy. The benefits noted in sections 3.2.1, 3.2.2 and 3.3 above have been calculated using the industry multipliers noted in the following documents:

- Construction employment – Scottish Input Output Tables data for Scotland 2002 adjusted for productivity improvements 2002 to 2006.
- Construction GVA – Scottish Input Output Tables Annual Business Enquiry data
- On site economic employment and GVA – Guidance on the Development of Tourism Projects, Scottish Enterprise Network 1999 / Scottish Tourism Multiplier Study 1992.
- Off site economic employment and GVA – Guidance on the Development of Tourism Projects, Scottish Enterprise Network 1999 / Scottish Tourism Multiplier Study 1992.

3.5.2 Leakage from the local economy is measured by applying displacement factors to the gross impacts to achieve the net impacts both noted above.

3.5.3 Using guidance issued by Scottish Enterprise a wide range of displacement factors have been applied to reflect both competition for on site and off site expenditure.

3.5.4 These factors range from very low figures of 0.5% for Glasgow hotel visitors on site who are assumed to have come to the resort with the intention to spend there, to 90% for Scottish residents' off site expenditure who are assumed to substitute spend at the resort for spend in other attractions and facilities in Scotland. (*Report by Ekos Limited – March 2006*)

3.6 Other regeneration outputs and outcomes

3.6.1 Recognising the need to engage the local community at an early stage in the process, WDC has identified a number of additional outputs that would either be achieved through the design of the proposed development or would be the subject for agreement under the planning process. These include:

- Decontamination of derelict land and bringing it back into economic use
- Provision of new public access to waterfront sites and the River Clyde
- Improvements to principal road networks
- Provision of relief roads as appropriate
- Restoration of historic listed buildings on nominated sites
- Improvements to existing rail stations and provision of new rail stations to increase rail use and reduce road use.

SECTION 4: WILLINGNESS TO LICENSE

4.1 WDC passed a motion on 21 December 2005 supporting in principle the establishment of a regional casino-led development in West Dunbartonshire. Furthermore, the Community Safety and Environmental Services Committee of the Council resolved on 1 March 2006 to respond formally to the call for proposals from the Casino Advisory Panel.

4.2 Local consultations

4.2.1 An extensive process of public consultation has taken place in February and March 2006. This included a series of focus groups in locations close to the potential development sites, a survey of over 1000 individuals throughout the area and consultations with local interest groups including Chamber of Commerce, Local Economic Forum, Community Councils, and church groups.

4.2.2 To ensure that independent views were obtained, focus groups and face to face surveys were conducted by an independent market research organisation, I.B.P. Strategy and Research Limited.

4.2.3 The results of the face to face consultations show support for a regional casino development in West Dunbartonshire in a ratio of 3:1, with 8% undecided.

4.2.4 When asked if there were any issues of concern, the response of the household survey indicated three key issues:

- Ability of roads infrastructure to cope
- Risk of growth of problem gambling
- Jobs created would not go to West Dunbartonshire residents.

4.2.5 All of these concerns would be addressed through a combination of the planning and licensing process and social impact measures noted in Section 2.

- 4.2.6 Consultations with the Community Councils and the Community Council Forum recognised the economic benefits of the proposals. The majority of the participants were in favour on the development, but raised similar issues identified by the face to face consultation exercise. (One Community Council conducted a localised survey in part of their area, the result of which was a ratio of 2:1 opposed to the development in their immediate vicinity. However, this is inconsistent with the independent consultation exercise in that area which indicated only 20% opposed to such a development).
- 4.2.7 Both major church groups in the area recognised the economic benefits of the proposed development, but expressed reservations on moral grounds about the availability of gambling in the area.

4.3 Resolutions of support by the Local Strategic Partnership

4.3.1 There are two key strategic partnerships that co-ordinate public sector policy interventions in West Dunbartonshire. The West Dunbartonshire Community Planning Partnership (CPP) is a body with representation from all public sector groups and its activities are set out in a Regeneration Outcome Agreement (ROA). The Dunbartonshire Local Economic Forum (LEF) delivers the economic development dimension of the West Dunbartonshire Community Planning Partnership. The development of a destination resort including a regional casino would significantly address the economic objectives of the LEF and West Dunbartonshire Community Planning Partnership.

4.3.2 The LEF met on 9 February 2006 and confirmed that a regional casino development would contribute to its strategy goal of creating new wealth hubs in the Lomond and Clyde area.

4.3.3 The Dunbartonshire Chamber of Commerce resolved on 23 February 2006 to issue a letter of full support for the Council's application for a Regional casino development.

4.3.4 The Scottish Enterprise Dunbartonshire Board also confirmed its full support on 23 March 2006.

4.3.5 Commitment from local tourism / leisure strategies

This application is supported by a hierarchy of national and local strategies. The national **VisitScotland Strategy** aims to increase tourism in Scotland by 50% in value by 2015. A key component of this is to attract new visitors to Scotland and to add value to the visitor experience.

The national Visit Scotland strategy is implemented at the local level by the **Argyll, Loch Lomond & Forth Valley Tourism Partnership** action plan. This makes specific reference to the provision of a regional casino development in Dunbartonshire as a contributor to achieving the national target.

4.3.6 The Glasgow and Clyde Valley structure plan endorses the Clyde Waterfront project and a regional casino development will make a significant contribution to the plan.

4.3.7 The Scottish Enterprise draft Metropolitan plan for the West of Scotland identifies the need for more businesses of scale in the region and greater innovation in the business base; it also identifies tourism as a priority growth industry. A regional casino development is recognised by the plan team as contributing significantly to the goals set out in the plan.

4.3.8 The Scottish Enterprise (SE) Strategy for priorities for investment in physical infrastructure approved by the SE Board in February 2006 agreed a change in emphasis in investment, away from areas such as speculative greenfield business park development to areas, including infrastructure, to support the principal tourism destinations in Scotland, one of which is Loch Lomond.

4.3.9 The Destination Loch Lomond (DLL) strategy is a multi partner strategy supported by the public and private sector that seeks to establish the area surrounding Loch Lomond, including West Dunbartonshire, as an international destination linked with the brand strength of Loch Lomond. The DLL strategy aims to achieve recognition of being in the Loch Lomond area as soon as traffic enters West Dunbartonshire. The preferred site is at the entrance of the area covered by the DLL strategy.

4.4 Organisations / individuals expressing support

4.4.1 Direct support for this proposal has been received from a number of organisations including Scottish Enterprise Dunbartonshire, Dunbartonshire Chamber of Commerce, Dunbartonshire Local Economic Forum and British Waterways.

SECTION 5: PROBABILITY OF IMPLEMENTATION

5.1 Evidence of overall feasibility: market demand analysis, catchment area and customer base

5.1.1 Market research for the local market conducted by a potential casino operator has been based on catchment areas within 20 miles, between 20 and 50 miles and further afield. Some 1.37 million adults live within the 20 mile limit classified as regional, including the economic development areas of West and East Dunbartonshire, Glasgow, and Renfrewshire. A further 1.23 million adults live within the 20 to 50 mile limit, classed as super-regional, includes Edinburgh, Stirling, Falkirk, Kilmarnock and Ayr. Further day visitation is expected from outwith these areas, classed as "out of market".

5.1.2 The market assessment calculates that from this market, a total of approximately 2.5 million visits would be achieved to the casino per annum.

5.1.3 In addition, 4 million people visit the West Dunbartonshire area each year (*WDC and Steam report 2004*). Glasgow International Airport is within 15 minutes travel time, Glasgow Prestwick is within 45 minutes travel time. Approximately 640,000 visits per annum would be achieved from this market.

5.1.4 The research forecasts average spends of £40 per visit from day visitors in the casino element.

5.1.5 In addition, the market research forecasts significant induced spend arising from tourists to the wider metropolitan area. It is assumed that tourist visitors would spend between £70 and £90 per visit in the casino element.

5.1.6 The total income assumed for the casino element for both day visitors and tourist visitors under this scenario is between £180m and £230m per annum.

5.2 Criteria used to identify appropriate and sustainable localities for the casino

5.2.1 Criteria to be applied in selecting the appropriate sites will include:

- Size of site to accommodate a large hotel, convention centre, family leisure and sports facilities and other non gaming facilities
- Accessibility to inter-modal transport
- Ability of non-gaming components to support local tourism targets
- Ability of location to minimise risk of problem gambling
- Alternative options for the available sites
- Planning policies and designations for potential sites.

5.3 Transport infrastructure

5.3.1 In relation to transport West Dunbartonshire is unique. No other local authority area in Scotland has sites available with the same access to air, rail, road and water transport facilities. Taking each in turn:

5.3.2 Air transport – West Dunbartonshire is directly linked by motorway via the toll-free Erskine Bridge, without passing through major centres of population, to Glasgow International Airport (15 minutes) and Glasgow Prestwick International Airport (45 minutes). A 2003 Government White Paper on future aviation demand until 2030 identified that both airports could expand substantially and cope with even the most optimistic growth in demand without investment in runways, as follows:

- Glasgow International – current operation is 7.5 million passengers per annum (mppa). Estimated current capacity without additional runway provision is greater than 15 mppa.
- Glasgow Prestwick – current operation is 2 mppa. Estimated current capacity without additional runway provision is greater than 6 mppa.

5.3.3 Rail transport – All potential sites within West Dunbartonshire connect with the Strathclyde West electric rail network. Central Glasgow is 20 minutes away by express service, with services currently operating every 15 minutes.

A key condition for agreement under the planning process would be the requirement for the operator to provide proposals for the installation of an additional station or, alternatively, improve existing stations including park and ride facilities.

5.3.4 Road transport – The potential sites are exceptionally well connected by motorway and dual carriageway to all major transport arteries. The Erskine Bridge provides direct connection to the M8 cross-Scotland motorway network (including Glasgow International Airport), the M77 to the south west of Scotland (including Glasgow Prestwick International airport), the M74 south to England through the currently planned extension of the M74 through southern Glasgow, and finally, but importantly, by the A82 trunk road to Loch Lomond and the wider West Highlands including the islands of Skye and the outer Hebrides.

5.3.5 Water transport – All potential sites within West Dunbartonshire are connected to both the River Clyde and the recently restored cross-country Forth and Clyde canal. A major element of the Clyde Waterfront regeneration project includes the regeneration of the River Clyde as an artery for transport and leisure use. A regional casino development in West Dunbartonshire will include public access to the River Clyde, links to the existing cruise liner terminals in Greenock and Port Glasgow, and stimulate associated regeneration by British Waterways Board in Bowling Basin.

5.3.6 New transport facilities - As part of the consultation for this application, SED has received direct approaches from operators of potential new transport facilities including:

- an operator of business and tourist **helicopter services** to the West of Scotland and Northern Ireland with links to Glasgow airport
- A provider of **high speed water transport** who is seeking to start a new, fast connection service from the lower Clyde to Glasgow city centre.

5.4 Current provision for gambling

5.4.1 As noted in Section 2.1.5, West Dunbartonshire has no history of widespread problem gambling and very few gambling establishments (no casinos, 22 betting shops and 2 bingo halls).

5.4.2 However, it is recognised that a regional casino development would be a significant development that would require the measures outlined in section 2 above to be implemented.

5.5 Impact on existing casinos and other leisure activities

5.5.1 West Dunbartonshire has no existing casinos. In the adjacent area of Glasgow, the number of existing casinos is low and they are small in scale. Thus, a successful regional casino development is expected to complement, rather than compete with existing gambling facilities.

5.6 Potential critical mass effect

5.6.1 As noted in 1.4.2 above, the development of a regional casino, hotel, convention centre and entertainment complex in West Dunbartonshire would have major economic impact in West Dunbartonshire and more widely, thanks to the area's excellent links with the metropolitan area of Glasgow. The development can be expected to create a supply chain cluster within West Dunbartonshire. Through its business support programmes, SED would invest in developing the ability of local companies to meet the additional demands placed on them by the casino development,

5.7 Estimated overall investment potential and investor interest

5.7.1 SED has been in development discussions with one of the world's largest operators of casinos, including regional casinos. There is no cost to the public purse within the proposed investment model and this operator is not involved in any other of the sites identified in Scotland.

5.7.2 SED has also identified major sites within the West Dunbartonshire area which are available and suitable for the development of a regional casino, hotel, convention centre and entertainment complex. WDC believes that it would receive at least one highly credible submission from an operator with an early delivery date.

5.8 Anticipated change in gambling spend

- 5.8.1 Based on operator research, it is assumed that the creation of a Regional Casino Development in West Dunbartonshire will have no change in gambling spend in the immediate area. Additional gambling spend of between £70 and £90 per person from additional visitors is anticipated.

SECTION 6: REGIONAL CONTEXT

6.1 The national context

- 6.1.1 The National Planning Framework for Scotland was published in April 2004. It provides a guide to the spatial development of Scotland to 2025, and complements the Scottish Executive's Framework for Economic Development in Scotland in highlighting the importance of "place" when identifying priorities for investment.
- 6.1.2 The National Planning Framework recognises that there is scope for a fuller integration of West Dunbartonshire within the economy of the Glasgow Metropolitan area and wider central belt of Scotland, and that the economic potential of central Scotland can be significantly enhanced through investment in areas such as West Dunbartonshire.
- 6.1.3 The National Planning Framework also recognises the rich maritime history and outstanding environmental assets of the Firth of Clyde, and confirms that these should be used to promote a stronger tourism and leisure economy in areas to the west of Glasgow, such as West Dunbartonshire.
- 6.1.4 **The spatial development of Scotland as set out in the National Planning Framework would be supported by the development of a regional casino with hotel, convention centre and family entertainment and sports facilities.**

6.2 The regional context

- 6.2.1 The Glasgow and Clyde Valley Joint Structure Plan was approved by Scottish Ministers in May 2002. It sets out a common strategy for the long-term development of Glasgow and the Clyde Valley area by providing a framework for growth and renewal.
- 6.2.2 The Structure Plan seeks to enhance the well-being and quality of life of the area by focusing on urban renewal and regeneration. The Structure Plan emphasises a central transport corridor with the River Clyde at its heart and promotes a corridor of growth which links centres of employment and services to communities by promoting key renewal opportunities.
- 6.2.3 The Clyde Waterfront is a Metropolitan Flagship Initiative, which requires priority to be given to regeneration through projects of national significance. There is therefore a desire to capitalise on existing economic clustering and accommodate national visitor and recreational attractions.
- 6.2.4 The Lower Clyde Estuary and Firth of Clyde is also recognised as a Tourism Development Area. The development of the site for a casino would support the Metropolitan Development Strategy and therefore meet the aims of the Plan.

- 6.2.5 The Glasgow and Clyde Valley Joint Structure Plan Finalised Alteration 2005 is a review of the approved Structure Plan. It sets a framework for the sustained growth of the area to 2025, and updates the existing Metropolitan Development Strategy and the vision for the area to that date.
- 6.2.6 The Corridor of Growth, promoting key renewal opportunities and setting priorities for action, is again highlighted within the Plan. The Clyde Waterfront Initiative, because of its importance and the scale of action required, is recognised and outlined. Capitalising on existing economic clustering through the creation of high quality development opportunities for jobs, and accommodating national visitor and recreational attractions whilst making use of the river, underpin the priority of reclaiming the Clyde Waterfront area for communities. The confirmation of the Lower Clyde Estuary and Firth of Clyde as a Tourism Development Area by accommodating new businesses and creating a competitive place establishes a framework within which investment is prioritised for this Strategic Development Location.
- 6.2.7 The proposed development, including hotel, tourism and leisure facilities as well as a regional casino is therefore in line with the Metropolitan Development Strategy of the Glasgow and Clyde Valley Joint Structure Plan Finalised Alteration 2005 and has been endorsed by the Structure Plan Manager.**

6.3 Local context

- 6.3.1 The Dumbarton District-Wide Local Plan 1999 is the adopted Local Plan for the area. It sets out the land-use planning framework for the area through a series of policies that underpin the Strategic Aims of the Local Plan.
- 6.3.2 At the time of the Plan's preparation some sites remained in industrial use and were designated as existing industrial land to reflect that. The potential sites for development as a regional casino with additional non-gaming facilities have now all been cleared of any such use. The policy indicated that the Council will encourage the creation of new jobs, support the expansion of existing companies and businesses and promote new industrial and business development, particularly the re-use of vacant land in such areas. It is intended that in seeking effective use of this land, the number of jobs in the area will be maximised.
- 6.3.3 The development of the potential sites for economic purposes would therefore be in line with the adopted Local Plan and underpin its Strategic Aims.**
- 6.3.4 There are some 210 hectares of vacant and derelict land in West Dunbartonshire – 2% of the national figure, and more than 1% of the Council area as a whole. Over 60% of residents in West Dunbartonshire live within 500m of a derelict site.
- 6.3.5 The amount of derelict land in West Dunbartonshire has more than doubled in the past 10 years, despite a significant number of sites being brought back into productive use. The development of a regional casino offers a significant opportunity to accelerate the process of urban renewal by redeveloping a large site therefore removing it from the vacant and derelict land register.

- 6.3.6 In conclusion, the policy framework of the Development Plan is supportive of the development of a regional casino development with additional non-gaming facilities. The reviewed Structure Plan and new West Dunbartonshire Local Plan provide a policy framework that explicitly supports the development of specific sites for economic development uses, and leisure and recreational facilities in particular. Redevelopment for a casino provides the opportunity to bring into productive economic use a vacant and derelict site, thereby enhancing this part of West Dunbartonshire both environmentally and economically.

SECTION 7 - COMMUNITY BENEFITS

7.1 Community benefits expected to accrue from the licensing and town planning processes

7.1.1 Following public consultation and discussions within the Council, the following would be sought:

- Contribution, potentially through profit or turnover share, for Community programmes
- Operator commitment to local employment within West Dunbartonshire
- Operator commitment to local purchasing within West Dunbartonshire
- Operator commitment to providing training in tourism related jobs
- Provision of a fund for programmes to counteract gambling addiction related issues.
- Public moorings and slipway to allow leisure craft access to the River Clyde.

7.1.2 The Council will continue to engage with all sections of the local community as this proposal progresses.

SECTION 8 - OUTSTANDING AND UNIQUE CHARACTERISTICS

8.1 Outstanding and unique characteristics are wholly appropriate terms to be applied to West Dunbartonshire. No other area offered for this type of development is within 20 minutes from the centre of Glasgow, has 70% of Scotland's population within 90 minutes, and is also 20 minutes from both a major international airport and from the outstanding scenic beauty of Loch Lomond and Scotland's first National Park.

8.2 These attributes mean that the opportunity offered by the location of a regional casino development with a hotel and significant non-gaming facilities in West Dunbartonshire has a high probability of success. It provides a major opportunity to reverse the problems of the area caused by years of industrial decline and the current imbalance of wealth and opportunity in the area.

8.3 Much is being done through the regeneration of Clydebank, Dumbarton, and Loch Lomond by public / private partnerships; a regional casino development between these locations is wholly complementary to them. It provides a major input to the regeneration of the area, and serves the wider Glasgow Metropolitan area without the downside of a city centre location.

8.4 West Dunbartonshire needs a regional casino development to provide a major regeneration initiative for the area, whilst the attributes of the area (scenery, connectivity, available labour force) can provide a successful and sustainable return for both developer and operator.

8.5 IN CONCLUSION

8.5.1 West Dunbartonshire has a compelling case for the development of a resort destination comprising a regional casino, a major quality hotel, a convention centre, sports and family entertainment facilities. Our proposal provides:

- A location close to **an area of natural beauty**, and close to major centres of population, but requiring a dedicated trip to gamble.
- **Access to an additional annual visitor population of 4 million** thanks to the proximity of the world-famous tourist destination of **Loch Lomond**.
- A **choice of sites of sufficient size** to accommodate a major resort development, with existing planning policies in place that support the development of a casino-led destination.
- **A regional and national planning framework that supports the development**, with further support from a nexus of local, regional and national economic regeneration policies.
- **Major potential for genuine economic regeneration to the West Dunbartonshire area**, having a local population with a larger-than-average proportion of economically inactive persons and the readiness of local enterprise agencies to build on a highly successful track record of job creation through training programmes. In addition, the level of investment and job creation will create a major benefit to adjoining areas within the Glasgow Metropolitan area, particularly Glasgow and Inverclyde.
- **An area with no history of widespread problem gambling**, but with a high level of awareness and concern for the potential impact of problem gambling from local statutory and voluntary agencies, coupled with a willingness to support cohesive remediation strategies.
- **Committed support for the project** from all local public bodies and broad support from the local population, as evidenced by recent consumer research.
- **Deliverability**, thanks to a tested business model and the readiness of at least one potential operator to proceed.

8.5.2 In summary, a regional casino development, with significant non gaming facilities in West Dunbartonshire would sit comfortably with the regional tourism development strategies, be well linked with transport infrastructure, regenerate derelict industrial land, and offer regeneration benefits to the wider conurbation in a location where the negative impacts of gambling would be minimised and the desirable outputs maximised. West Dunbartonshire offers a unique opportunity to realise the objectives set out by the Casino Advisory Panel.

Annexure 1: Source materials

The Dunbarton District-Wide Local Plan 1999.

"A Tourism Strategy & Operating Plan for Destination Loch Lomond 2006-2011" – Final Draft.

The Glasgow and Clyde Valley Joint Structure Plan (approved 2002) – Finalised Alteration 2005.

West Dunbartonshire Social and Economic Profile – 2004.

The West Dunbartonshire Local Plan (Consultative Draft) – January 2006.

Social Impact Study, March 2006: *Responsible Gaming Solutions Limited*.

Local Opinion Consultation Report, March 2006: *IBP Strategy and Research*.

Economic Impact Study, March 2006: *EKOS Limited*.