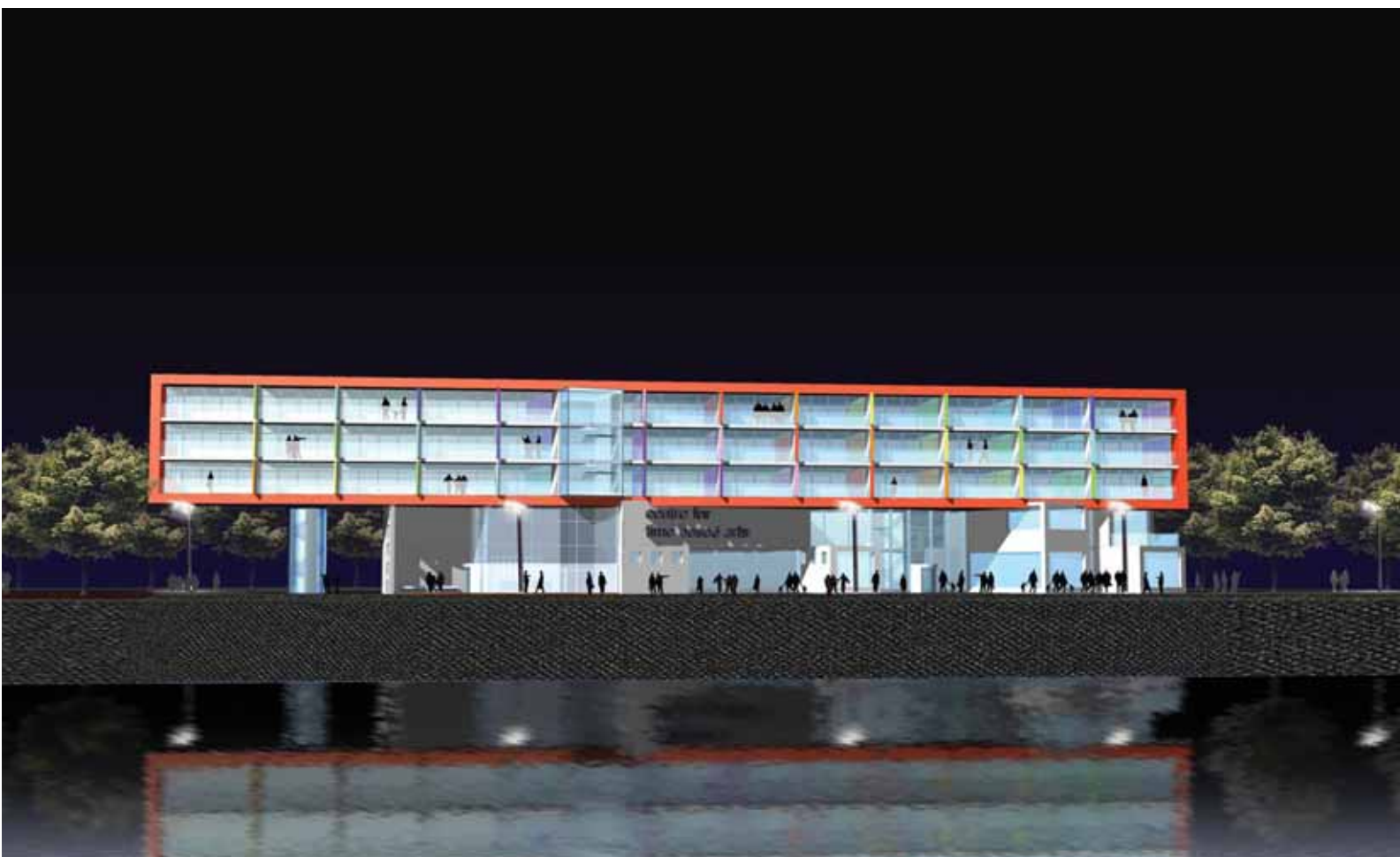




Hull  
City Council

Hull City Council  
Independent Casino Advisory Submission **2006**



In partnership with



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Pathfinder to Renewal in Hull & East Riding of Yorkshire

Hull City Council

**Independent Casino Advisory Submission**



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## Background

### Location

Hull is the capital of the Humber Sub-Region an area with a population of 877,000.

Further to our earlier submissions, to the panel the City Council has identified two Strategic Development Areas (SDA's) within the City Centre as a suitable site for a Large Casino. These are:

The Fruit Market Area

Albion Square

Both areas have under-utilised property assets and suffer from widespread dereliction, reflecting a lack of any significant investment over the past five years.

### Community Benefits of a Large Casino

A licence for a large casino, will help to create the following indicative benefits

- 200-250 new jobs directly
- A new large scale leisure venue within the City Centre
- An anchor tenant within an underdeveloped SDA
- Increase investor confidence in the City Centre leveraging in new investments
- Improve the visitor offer

### The Need for Regeneration

Hull as a Local Authority is ranked the 9th most deprived area of England, and as such is the most disadvantaged area within the region. 47% of the Super Output Areas fall within the most deprived 10% nationally. The City has the highest proportion of unemployed people in the region, and has amongst the lowest wages in the country.

It was identified that one of the reasons for the underperformance of the economy in the City was the absence of a critical mass of activity within the City Centre, which has led to:

- Shopping and leisure spend going outside of Hull to other Cities such as York, Leeds and Sheffield
- Limited choice of leisure and entertainment, bars, restaurants and shops
- Shortage of good quality office accommodation
- Lack of job opportunities
- Few things to see and do in the evenings
- Little choice of quality places to live

In essence the poor retail offer, leads to leakages in leisure and retail spend, reducing the range and quality of leisure experiences. This impinges on the development of the housing market, in turn limiting investment in the office market.

### Willingness to Licence

The Cabinet of the City Council approved the application for a Large Casino on the 21st August 2006. This follows endorsement by the Economy theme of the Local Strategic Partnership (LSP), as well as earlier endorsement by the Asset Management Committee for a Regional Casino.

Six operators have shown strong interest in Hull as a location.

## The Masterplan: An Overview

### *The emerging new office quarter at Humber Quays*



### **The Masterplan**

With new found confidence, Hull is now raising its game and successfully competing with other UK cities in terms of job creation, investment and economic growth. Momentum is building as derelict land and empty buildings are being turned into physical and economic regeneration projects, creating a thriving investment climate.

These are not just changing the face of the city centre, but are providing the opportunity to breath new life into the city, providing a platform for a vibrant 24-hour centre where people choose to live, visit and work.

The city has secured over £670m of planned new investment in Hull city centre in the last 5 years,

and it is anticipated that a further £870m will be secured over the next 10 years.

Commercial planning applications have also seen a 50% uplift since Citybuild's establishment to 128,489sqm between 2002/05 compared with 84,351sqm in the three years prior.

### **Hull's hotel market**

In 2006 a comprehensive study of Hull's hotel market provided evidence that there is a strong hotel demand, particularly during the mid-week period in Hull city centre. Corporate demand is very strong and the overnight tourist market is growing rapidly. This is illustrated by the exceptional performance of the Holiday Inn, both in terms of occupancy levels and average room

## The Masterplan: An Overview

rate. Demand is currently frustrated and Hull city centre loses business from the market by virtue of visitors restricting themselves to day visits or staying outside of the city.

City centre planned development will more than double the bed stock and the city has received strong levels of hotel interest across the market sector.

### **Conference and entertainment market**

In September 2006, Convention Sports and Leisure (CSL) International completed a thorough study of the conference, convention and meetings market, and, the music and entertainment market.

The research concluded that the business conferencing market is a growth area for Hull but that currently sufficient demand exists for a large hotel/ conference centre able to accommodate events in the 600 - 1000 attendance range, in world-class contiguous space— reaching a new benchmark and making Hull a competitive conference destination.

CSL also found that Hull had great potential in the live entertainment markets, particularly music, family shows and live stage performances. The population demographics could support a 6,000 – 8,000 seat “super theatre” and would provide a competitive and attractive venue for this lucrative entertainment field.

Hull City Centre Masterplan sets out a plan for improving Hull City Centre providing retail and leisure facilities, offices, homes and employment opportunities. It provides a strategic framework which guides public and private investment decisions.

Target outcomes are:

- £1.5 bn of commercial investment
- £240 m of residential investment
- 3000 new homes

- 5200 new jobs
- new prime office core
- strong retail circuit.

The masterplan identifies 6 key areas where resource will be focused. These are shown on the map opposite.

**St Stephen’s** - a retail-led, mixed use scheme led by ING Real Estate and is the 2nd largest city centre development in the UK

**Humber Quays** - A spectacular office-led development that maximises its waterfront location creating a hub for international trade

**East Bank of the River Hull** - A major residential community development along the River Hull

**Quay West** - An impressive, vibrant retail quarter developed around a new public plaza

**Fruit Market** - Cosmopolitan development of an old town location around Hull's marina

**Albion Square and heart of the city** - Creation of a lively quarter that spans office, leisure and residential development.

# Strategic Development Areas



- |                                     |                          |                          |
|-------------------------------------|--------------------------|--------------------------|
| Humber Quays                        | Quay West                | Retail circuit           |
| Fruit Market Area                   | Old city centre boundary | New bridges              |
| East Bank of the River Hull         | New city centre boundary | New pedestrian crossings |
| Albion Square and Heart of the City | St Stephen's             | Parks                    |
|                                     | New and improved routes  |                          |

## Strategic Development Areas



### **St Stephen's**

St Stephen's is a £200m flagship retail and leisure development and is the second largest mixed-use city centre regeneration project in the UK. Led by one of the world's leading developers ING Real Estate, St Stephen's will cover a 40 acre site in the heart of Hull and will feature a spectacular shopping and leisure complex, a new state-of-the-art public transport interchange, 220 city centre homes, 128 bed luxury hotel and a purpose built home for the internationally acclaimed Hull Truck Theatre.

Due for completion in 2007, St Stephen's will create 2,500 new permanent jobs and 400 temporary jobs during construction.

### **Progress to date**

- Work started on site in September 2005 and a massive construction programme is underway with over £1m expenditure per week. There is substantial interest from occupiers and the pre-let target of 60% of

spaces has been achieved with big names such as Tesco, NEXT, H&M, Zara, River Island, HMV and Oasis already confirmed.

- Work is progressing well on the state-of-the-art transport interchange, the first fully integrated transport interchange of its type in the country.

## Strategic Development Areas



### **Humber Quays**

Humber Quays is Hull's new waterfront business and international trade district, offering stunning views of the Humber Estuary. It incorporates exciting opportunities for office, hotel, conference, residential and restaurant development. The seven acre scheme will re-unite the waterfront with the city centre and will have the capability to put into place the scale and quality of development needed to re-position Hull to attract a highly skilled, professional and traditionally mobile workforce.

### **Progress to date**

#### **Office**

- Creation of office building one – a world class, RICS award winning, high quality location comprising a spectacular public plaza, 21,800sq ft of office space and decked car park. There has been a healthy level of interest from prospective occupiers and terms are currently being finalised with the agreed tenants. An

events strategy is being developed to maximise use of the public plaza.

- Licence granted to develop the Hull & Humber World Trade Centre, the second in the UK.
- Priority Sites commenced construction of a larger second office building - circa 42,000sq ft for which is already generating interest from prospective tenants.

#### **Residential**

- A developer has been selected for the area's high quality 50 apartment residential scheme overlooking Hull Marina and construction work will commence late 2006.

#### **Hotel**

- A detailed market appraisal for a four star full service international brand hotel was undertaken and a preferred operator and developer partnership has been given until the end of 2006 to finalise their scheme.

## Strategic Development Areas

*An artists impression of The Boom on the East Bank of the River Hull*



### **East Bank of the River Hull**

The East Bank of the River Hull will see a stunning £100m residential-led development connected to Hull's old town. It will feature 600 luxury riverside apartments, a 120-bed luxury hotel, shops, boutiques and bistro cafés. It will be served by first class amenities including a wide range of educational and health facilities.

### **Progress to date**

- The residential scheme has secured planning consent subject to the resolution of highway issues. The first phase development is circa 325 accommodation units and incorporates restaurant and office components at a total cost in excess of £50m. Second and third phases will add a further 275 accommodation units and the total scheme has a value of £100m.
- A final design for the River Hull footbridge to connect the East Bank to the city centre is selected. It offers the potential for people to enjoy the unique experience of riding on the bridge while it moves, a world first.
- A consultancy team has been selected to undertake the complex River Hull Impoundment Study, the first stages of which have commenced.

## Strategic Development Areas



### **Quay West**

*Quay West*

Quay West is the impressive £300m development that will extend Princes Quay shopping centre out to the west. Led by Hendersons Global Investors and Insight Investment, Quay West is designed to accommodate flagship retailers not currently represented in the city. It will incorporate around 60 new retailers, two new flagship department stores, restaurants and cafes, a hotel, health club and conference facility. The scheme will create a new city quarter, defined by new streets, public squares and open spaces.

Due for completion late 2009, it will create in the region of 3,500 permanent jobs

- Work has been undertaken with Henderson's to improve the content and design of the proposals and on the land assembly strategy.

### **Progress to date**

- The Quay West scheme is seeking to secure outline planning consent.

## Albion Square

The Albion Square and heart of the city development area will create the following outputs:

1. Gross new jobs created 511
2. Land unlocked for development 1 ha
3. Brownfield land reclaimed 1 ha
4. Total area of new business space created 10,500 sqm
5. New floorspace - office 5,500 sqm
6. New floorspace - retail/leisure 5,000 sqm
7. Number of new residential units 200
8. Land improved for public use 1.0 ha

The Albion Square/Heart of the City SDA covers two physically separate areas of the city centre. Albion Square comprises a large, prominent and centrally located site of approximately 1.04ha (2.57 acres) and takes in the prominent surface car park at Albion Street /Bond Street and under-used land and buildings that adjoin it within Hull's New Town to provide a major redevelopment opportunity.

The site currently contains a large surface car park, which has been undeveloped since the original buildings were destroyed in the Second World War, together with a mix of derelict former retail premises and a range of occupied buildings in a variety of uses. The overall area has suffered from a lack of public and private investment in recent years despite several aborted attempts to bring forward redevelopment proposals. In addition an opportunity exists to respond to the recent major investment in the adjacent Maltings complex, and to provide the rationale for renovating or redeveloping the out-moded Kingston House building that overbears and hides the Maltings. In short, Albion Square is a significant site which is unrivalled in terms of the opportunity it presents in the City Centre.

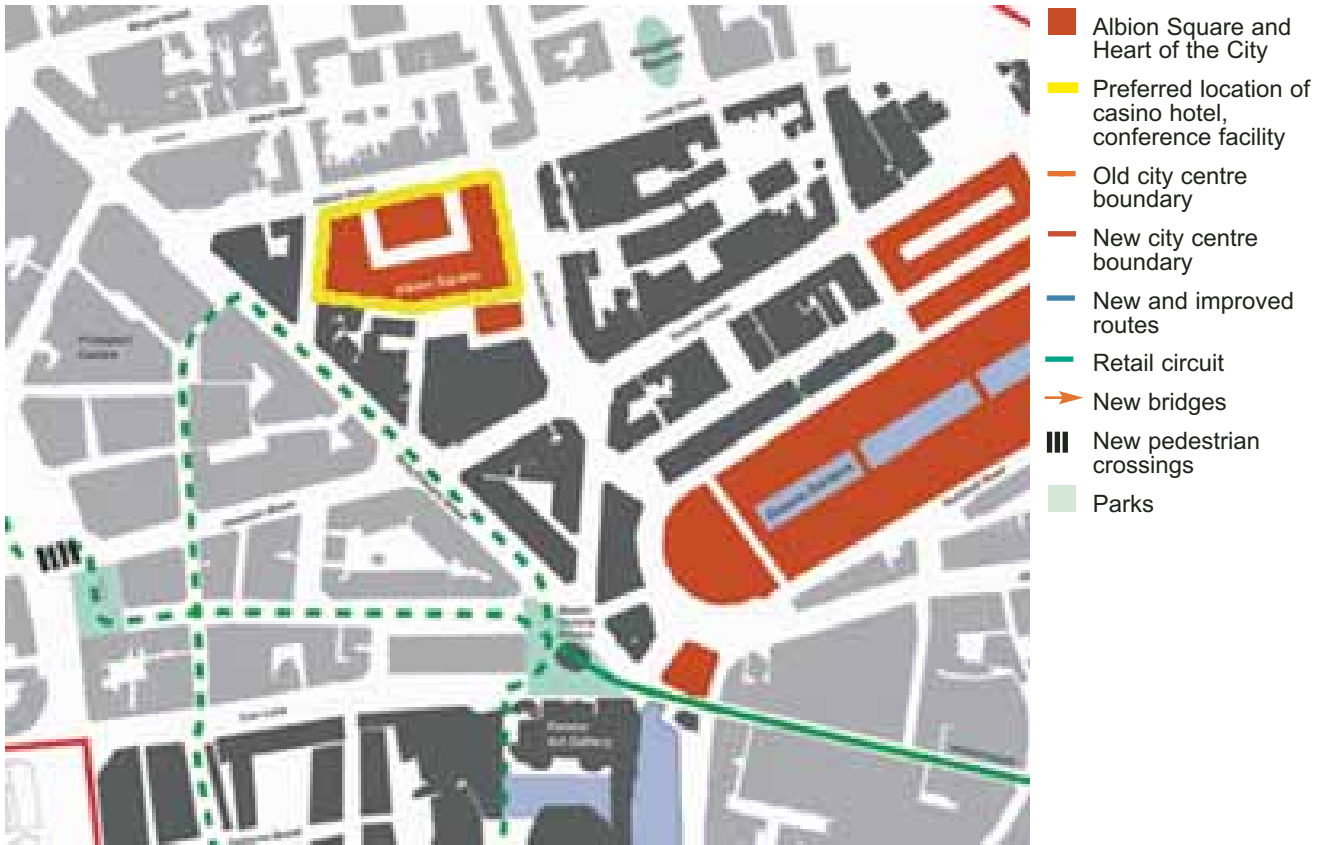


*Georgian terrace, Albion Street*

It is acknowledged that the Albion Square site could be of great importance in accommodating major employment, leisure and cultural uses which will be required in the coming years and work is underway to progress feasibility studies to inform the more detailed development framework for the area.

The size of the Albion Square site is sufficient to accommodate initial development in excess of 10,500 sq m and this would be configured in a

## Albion Square



fashion which is sympathetic to the existing Georgian terrace on the north side of Albion Street but also allows for an increased height of buildings towards the southern boundaries.

Albion Square presents a significant opportunity in the city centre and the development of a casino in conjunction with hotel and conference facilities on the site could provide the catalyst for additional regeneration in the immediate vicinity which currently suffers from a lack of investor confidence. In turn this will help drive forward the delivery of the economic benefits and objectives of the City Centre Master Plan.

### Fruit Market

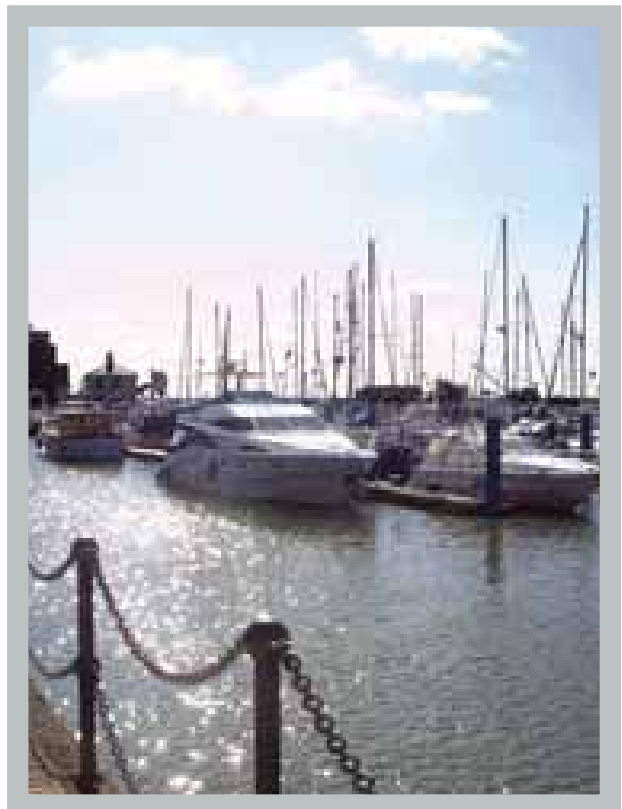
The Fruit Market will produce the following key outputs:

1. Gross new jobs created 761
2. Land unlocked for development 6.75 ha
3. Brownfield land reclaimed 4 ha
4. Total area of new business space created 16,000 sqm
5. New floorspace - office 10,000 sqm
6. New floorspace - retail/leisure 6,000 sqm
7. Number of new residential units 400
8. Number of new hotel beds 100
9. Land improved for public use 0.68 ha

The Fruit Market Strategic Development Area comprises approximately 4.85 hectares (12 acres) on the Humber waterfront between Hull Marina and the River Hull, South of Castle Street. The area is currently typified by under-utilised property and neglected streets and it still houses the City's Fruit Market concentrated around Humber Street.

The City Centre Masterplan recognises the enormous potential of the currently under performing Fruit Market area to improve the City Centre economy and the comprehensive redevelopment of this area has the potential to introduce within the City Centre a substantial quantum of additional residential, workspace, studio, restaurants, retail and leisure uses including hotel and casino operations.

Work is currently underway to refine the opportunities this area presents and the emerging development framework for the Fruit Market will ensure that comprehensive redevelopment is achieved with the right mix of uses in the right locations and with the optimum leverage of a high level of private sector interest to ensure maximum regeneration benefits. In addition, a complementary programme of improvements to the public realm and streetscapes will be instigated to create the right environment for new investment.



*Hull Marina*



*Myton Bridge, over the River Hull*

## Fruit Market



From work undertaken to date the most appropriate potential site for a casino with the potential for ancillary leisure uses such as a hotel and conference facilities is the area indicated on the plan below. This site provides an area of 1.48 hectares and could accommodate development of approximately 13,300 sq m overall. Indicatively this can be provided up to a height of 5 storeys with additional provision for car parking being made on both this site and elsewhere communally in the Fruit Market area.

This site presents an opportunity to take advantage of the waterfront location and will form a key location as part of the wider waterfront regeneration strategy which builds upon the unique natural assets provided. The development

of a casino facility together with a hotel and conference facilities on this site could therefore prove to be invaluable in helping unlock the significant regeneration of the Fruit Market and as such assist in delivering the aims of the overarching City Centre Masterplan.

## Response to Questions

### Need for regeneration

***As an alternative to a Regional casino, what do you consider are the main benefits to regeneration that could be achieved by a large casino in your area?***

The main benefits to regeneration from a large casino are:

- It could provide an anchor tenant for one of the SDA's
- It will provide an added incentive to high quality hotel operators to encourage them to invest in the City. CityBuild are currently marketing the City to high quality hotel operators reflecting an identified gap in the market.
- It will provide significant employment opportunities, which will be accessible to residents in deprived areas, we will work with any operator utilising existing employment schemes to ensure maximum employment benefits to the local population.
- It will provide a new leisure offering in the City, it is anticipated that it would increase the development of new restaurants, café bars etc. It will also encourage a broader mix of the population and increasing volumes of people in the City of an evening, reducing the fear of crime.
- It can help to facilitate wider social improvements, through the development of a Community Chest, the extent of which is likely to be determined through the competitive process.
- It will help to promote the City as a location for conferences, business travellers and general tourists.

It is stated in the proposal that a regional casino scheme would represent a catalytic proposal for the city region delivering a significant inward investment to Hull generating significant secondary and tertiary employment opportunities.

***Could you provide information relating to direct and multiplier effects of a large casino rather than a regional casino?***

We anticipate that a large casino would provide approximately 200-250 direct new jobs. This is a conservative figure and reflects discussions with the various operators who have expressed an interest in the City. For example, the Aspens Casino in Newcastle currently employs approximately about 240 people, it is anticipated that a large casino would have more employees than this, reflecting a greater floorspace and opportunities.

In terms of the multiplier effects of a large casino, this is rather subjective reflecting the fact that, for example, a large casino could promote the development of a four/five star hotel, which is currently lacking in the City. We believe that a figure of 1.4 is reasonable this is based on the RIMS figure for Wisconsin and also the multiplier figure for English Partnerships for leisure activity

$$200 * 1.4=280$$

$$250* 1.4=350$$

Given an indicative figure overall job creation would therefore be between 280 and 350.

***In particular, is the recent planning application by Isle of Capri the source for your claim of between 1250 and 1500 direct full time equivalent jobs and a further 1750-4000 jobs induced? Can you tell us the evidence base for this assertion?***

On page 7 of our report (2nd paragraph under employment generation) states that a regional casino and ancillary uses, once operational, will generate between 1250-1500 direct full time equivalent jobs. This view was supported by the Ernst & Young study 'Solutions in Regional Development' commissioned by Yorkshire Forward which on page 35 suggested

'As a guide for the potential job creation within Yorkshire and the Humber, all the planning

## Response to Questions

applications submitted within Sheffield suggest that employment levels within the casino complex will be between 1000-1500 full time equivalent staff.'

The figures for the multiplier effects of the proposed development reflect a wide range of values based on the experiences of US based operations. These figures were quoted in the planning application. In our application we suggested that as a result of a Regional Casino there would be approximately 3,000 jobs created.

Figures for the Multiplier vary considerably Hamer (1995) calculates that the New Jersey Casino's, create an additional 1.09 jobs for every job in the Casino.

The economic impact of the Indian Gaming industry by Micheal Evans (2002) suggests a multiplier of 2.21.

The ability to draw visitors into the area from the rest of the UK, reflecting the uniqueness of the facility made us feel that the multiplier effects, of approximately 2 were reasonable. Hence our assertion of the figure 3,000.

(It should be noted that first hand information available to the Panel is as follows:

### Hohensyburg, Dortmund, Germany

Employed in gambling	350, of which 235 are in skilled jobs (gaming / technicians)
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Employed in the restaurant, etc	150
---------------------------------	-----

<b>Total</b>	<b>500</b>
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Hohensyburg is said to be the third largest casino in Europe. It has a gaming area of 6729m<sup>2</sup>, 45 games tables and 320 slots, all with no limit.

### Star City Birmingham (revised)

Employed in gambling	125
----------------------	-----

Employed in catering, etc	62
---------------------------	----

**Total (full time)**

**187, +14 not full time**

Star City is said to be the largest casino in the UK licensed under the Gaming Act 1968. It has a licensed area of 3156m<sup>2</sup>, of which 2039m<sup>2</sup> is available for gaming, 25 tables 76 automated roulette positions, 70 "s.21" machines and 20 "s.31" machines).

### Social Impact

**39% of respondents from your Customer Advisory Panel consider spend on other leisure activities would decrease. Did this response relate to a regional casino proposal and has any further consideration been given to this aspect of impact?**

This response related to a Regional Casino an associated hotel leisure complex with Gym and other limited facilities, and was based outside the City Centre.

A large casino will be sited in the City Centre, in looking at the impact of a large Casino we have reviewed the findings of the City Centre Masterplan as undertaken by Roger Tym's. This highlighted the fact that the City Centre is currently underperforming, which has led to:

- Shopping and leisure spend going outside Hull to other Cities like Sheffield, Leeds and York.
- Limited choice of entertainment, bars restaurants and shops
- Lack of job opportunities
- Buildings and land that do not reach their full potential throughout the City Centre, especially around the unique waterfront locations along the River Hull and the Humber Estuary.

## Response to Questions

In the econometric forecasting models produced by Roger Tym's it is estimated that between 2006-2016, there will be an increase of 2100 full time equivalent jobs in retail, hotel and catering, reflecting the latent potential for development of this market in the City Centre.

In response to this the Masterplan has drawn up Aims and Objectives including:

- The creation of a lively City Centre
- Prime locations such as the River Hull and Humber Estuary
- More choice and better quality shopping
- A greater choice of jobs with better pay
- New uses for old and derelict buildings and making the most of our heritage
- Developing cultural and tourism opportunities within the City.

There will inevitably be some displacement of expenditure between any new casino facility and any existing offering, however we anticipate that this will be limited with a large casino for the following reasons,

We believe a large casino will add to the tourism offer of the City and hence promote additional visitors and expenditure to the City. A casino in the City Centre will bring forward a new leisure experience, and is likely to attract a new audience into the City Centre, particularly amongst the more mature clientele.

Currently there are only 22 restaurants in the Myton ward which takes up virtually all of the City Centre, this is significantly below the numbers for similar sized Cities. A number of these are only open for the day time early evening. There is a shortage of high quality restaurants, which cater for the needs of businesses, the more affluent residents and visitors.

The development of a large casino locally in either Albion Square or the Fruit Market (both Strategic Development Areas (SDA's)) will help to act as a catalyst for the regeneration of the particular SDA

and the City Centre as a whole, by providing an anchor tenant for the development and consequently increasing opportunities for associated leisure, retail and commercial opportunities.

Expenditure on gambling in casinos is set to increase with changes to regulations, as evidenced within the Pion analysis, suggesting scope for new opportunities without significantly displacing existing activity.

### Evidence from Pion

It is recognised that a Large Casino may have some impact on the existing gaming and leisure market through displacement. The risk of displacement in terms of the existing Casino operations is considered relatively low, reflecting the evidence from the Pion model:

	Baseline (Current)	Post de-regulation
Adult Casino participation	3 %	10%
Visits per participant	9	12
Average spend	£55	£45

Based on the assumptions in the model, it can be seen that there is likely to be a significant increase in gambling as can be seen below.

Existing Market	$300000 \times 3\% \times £55 \times 9 = 4,455,000$
Post de-regulation	$300000 \times 10\% \times £45 \times 12 = 16,200,000$

The figures for the population going to the local casino are based on drive times of 30 minutes as indicated in Solutions in Regional Development undertaken by Ernst and Young for Yorkshire Forward. These figures ignore the relative geographic isolation of the City. Crudely the adult population of the City of Hull and the East Riding of Yorkshire is 463,000, this represents a journey of approximately 40 minutes, as such we anticipate that the figures detailed will be rather conservative.

## Response to Questions

*Have you reviewed the potential social impact of a large casino and if so may we have sight of the findings and any policies you have or are developing?*

### **Environmental Impacts**

The environmental impacts of a large casino have been mitigated against by locating the casino in the City Centre in close proximity to both the train and bus station.

By locating the casino into the City Centre there are increased opportunities for it to act as a catalyst for further tourism-based development, as well as leisure and retail offerings.

Both preferred locations are brownfield sites, with a number of either vacant or derelict buildings. As such a casino licence attached to these areas will help to directly develop these areas and tackle dereliction and the associated social problems arising from this.

casino operators will be encouraged to work with ARC, the Architectural Centre for Hull and the Humber region to design into any new buildings measures to increase energy efficiency and minimise environmental impacts.

### **Social Impact**

The possible social issues and concerns of residents around the development of a casino are:

Protection of Children and the vulnerable

As part of its licence any casino is required to actively steward the doorway and ensure that all guests and members are over 18. Any operator would be expected to have all door staff registered for SIA. We would also look put in place a system of test purchases, to ensure these systems are in place. Such stewardship has already been successfully encouraged and enforced in Hull using similar schemes in respect of the sale of tobacco and alcohol to young people. In addition, we would seek to ensure that any operator establishes an awareness programme in schools and colleges about responsible gambling.

### **Protection of vulnerable people**

In terms of protecting vulnerable people who can not make informed decisions about gambling due to mental impairment, alcohol or drugs, this would be covered by the legislation. As a licencing authority we would work with the operator to ensure that any further safeguards and examples of best practice are adopted.

We would expect any operator would run a membership scheme as well as having CCTV in the casino, in order to identify unusual behaviour symptomatic of vulnerable people. Additionally nuisance and problematic clients can be more readily identified, and stopped from entering the premises.

### **Problem Gambling**

An increase in problem gambling, figures relating to problem gambling vary significantly between studies from 0.8 % to 5%. In terms of a casino being a direct cause of problem gambling this is thought to be a low risk, for the following reasons:

A casino is, by its very nature a location where individuals will have to make a conscious choice to go to, rather than an impulse decision to visit.

There are currently multiple outlets where individuals can gamble locally. These include betting shops, bingo halls, the national lottery, amusement arcades and fruit machines in pubs. Most importantly one of the biggest areas of growth is in terms of internet gambling, which is not subject to the same regulation and safeguards.

Whilst a casino may have some members who have or become problem gamblers, any operator will be required to have systems in place to identify this. As a licencing authority we would look to work with any casino operator to identify these individuals, explain to them that the operator believes they have a problem and refer them to counselling, as well as barring them from the site.

As part of the licencing procedures we would look to ensure any operator has clear policies on self exclusion systems and how these systems are

## Response to Questions

implemented. We would also expect any operator to promote education on responsible gambling through the media.

Furthermore we would expect any operator to provide advice and guidance to the PCT's on problem gambling as well as providing publicity, and making this available in a range of languages. This reflects anecdotal evidence of a greater prevalence of gambling amongst certain ethnic groups.

### **An increase in Crime**

The probability of an increase in crime inside the casino is thought to be minimal. This reflects the high level of stewarding internally, as well as the tight regulations under which casino operators operate. The bar sales do not make a significant proportion of revenue income within casino operations and generally drunkenness and associated problems are likely to be minimal, reflecting our experience of the existing casinos. Additional safeguards we would expect to see in place, include a ban on drinks promotions at the venue and attendance and support of the pub watch scheme.

It is anticipated that as a result of the casino there will be an increase in the numbers of people visiting the City Centre, bringing with it a natural policing presence which will reassure people going out.

### **Negative publicity**

A negative reaction to a casino by the local community reflecting social concerns, and religious or philosophical grounds, would adversely impact on the success of the scheme and consequently its wider impact. However, we will ensure that the public is kept well informed with relevant factual information to allow them to form a balanced view.

### **Willingness to licence**

***Has a decision been made on the recent planning application by Isle of Capri Casinos Inc? What was it?***

A decision has not been made with regard to the recent planning application by the Isle of Capri Casino's. This reflects a lack of information available on the application, we understand the planning consultants have recommended that the application is withdrawn, however we are still awaiting confirmation with regard to this from Isle of Capri Casinos.

It is noted that your Asset Management Committee has previously resolved in favour of a regional casino. Have there been any further resolutions since the proposal was prepared?

An approval for a large casino licence has been granted by the Cabinet of the City Council, as part of CityBuild's business plan.

### **Probability of Implementation**

***Please provide further specific evidence to support the probability of implementation of a large casino?***

The probability of implementation is considered very high, following the decision to shortlist the City for a large casino licence. We have experienced a high degree of interest from a number of operators as documented and have increasing backing from stakeholders for the development.

As well as interest from the Isle of Capri as documented previously we have strong interest from Stanley Casinos, Ranks, Luminar, Century Casinos, London clubs and Aspers, We have also had interest from an agent RPS on behalf of an unknown client. This is obviously confidential information

## Response to Questions

### **Community benefits**

***What is your assessment of the community benefits of a large casino? Please give any previous examples of the Council securing benefits through the planning or a licensing process.***

The Community benefits of a large casino are that it will provide:

Additional employment to an area with the highest level of unemployment in the Region. The Council will actively look to promote employment opportunities in the casino amongst this group.

It will provide an additional attraction to the City which will encourage hotel operators to come to the City, as well as increasing the attractiveness of the City for conference events and general tourism.

The casino will be placed in an area where it will compliment and promote other potential tourism, leisure and retail opportunities, and will act as a catalyst to wider regeneration, by providing an anchor tenant in these areas.

It is anticipated by carrying out a beauty parade of casino operators, additional monies will be made available for the regeneration of the City through a community chest.

The City Council have not used Section 106 agreements to secure employment benefits through planning. Section 106 agreements have however been used to secure physical benefits successfully.

Instead the Council has looked to build close working relationships with developers and businesses, which have been successful, examples of which include:

Working with the Village Hotel to promote employment opportunities amongst unemployed people locally. Hull City Council worked with the hotel operator to provide a series of job fair days, as well as pre-interview training to unemployed residents within the City.

Other notable examples include Construction Works which worked with out of town contractors to provide locally qualified tradesman on building sites throughout the City. This arrangement proved highly successful on the Kingston Communications Stadium.

### **Unique characteristics**

***What is the prospect of a significant proportion of the one million passengers who pass through Hull's port each year being attracted to stay overnight as the result of a large casino being developed in Hull?***

In addition, to the current sailings from Hull, Associated British Ports is currently looking at developing a river berth close to the City Centre for cruise ships to use for scheduled stop offs. This would greatly enhance the number of visitors to the City, especially those with high spending power.

At present due to the sailing times of the ferries (Arriving in Hull early morning and departing late evening), scheduled ferry passengers need to be offered a full day/evening of leisure attractions to encourage them to stay in the City for a night rather than merely passing through.

The presence of a casino will combine with the development of the Museum Quarter including the Wilberforce Museum, as well as The Deep and The Kingston Communications Stadium. The City has also invested heavily in its cultural attractions most notably with the development of the new Hull Truck Theatre. Moreover, the attractions of the nearby countryside and towns of the East Riding ensure a much stronger leisure offering to tourists.

In addition, the development of the retail offer at St Stephen's and the proposed development of hotel and conference facilities will all serve to augment on the existing visitor experience.

Data from the Steam report 2000, projected that visitors to the city were likely to increase to 8.23m by 2006 from 6.57m in 2000, of which the percentage of day visitors would decrease from 88.6 % in 2000 to 86.0% in 2006.

## Response to Questions

### **Type of area**

***Given the high percentage of the population classified as “white” how could Hull act as a good test of social impact.?***

Hull can act as a good test of social impact for the following reasons:

The population is relatively geographically isolated from other potential casino locations as well as other large conurbation areas.

The City is in major need of regeneration and suffers from market failure in terms of retail and leisure development. As such it could serve to demonstrate the impact of a casino to facilitate wider regeneration.

Hull has a large proportion of the population which is classified in lower social economic groupings and as such, it would be a good example of how a casino development impacts on the lower social / economic groupings.

The city has a high level of unemployment, and the council will actively look to promote employment opportunities in the casino amongst this group, in a similar way to the village hotel.

The City currently has a relatively low level of tourism and as such it should be relatively easy to distinguish whether this acts as a major draw for tourism.

Because Hull has a high percentage of the population classified as white, this could act as a good test of social impact for the following reasons;

It could provide a control sample on the impact of gambling, with regard to race/religion.

Conversely, Hull has a relatively low proportion of Muslims, the Koran is against gambling and as such this is likely to cause less offence than in many other localities. In many areas the groups with the highest levels of unemployment are amongst the BME groups, many of whom for religious reasons would not consider employment in a casino.

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