

Prepared By

CRG Consulting
325-301 Moodie Drive
Ottawa, ON K2H 9C4
613-596-2910
www.thecrg.com



MARKET STUDY FOR PROPOSED BINGO FACILITY: RIDEAU CARLETON RACEWAY

FINAL Report

CRG File # 08-182

Prepared For

Rideau Carleton Raceway Entertainment Centre

December 16, 2008 (Revised)



Table of Contents

Executive Summary and Key Conclusions	1
1.0 Background: Purpose and Approach of Study.....	4
2.0 Overview of the Bingo Gaming Industry	5
2.1 Bingo Gaming Regulatory Framework in Ontario	5
2.2 Bingo Gaming Industry Trends	6
2.3 Bingo Gaming Industry in Ottawa	8
3.0 Market Study: Proposed Bingo Hall at Rideau Carleton Entertainment Centre	12
3.1 Existing RCEC Facilities and Summary of Proposed Bingo Operation	12
3.2 Market Study Elements	13
Attachment A: CRG Onsite Intercept Survey	22
Attachment B: List of Charitable Organizations	27
Attachment C: Annual Bingo Hall Information – 2000 to 2007	28



Executive Summary and Key Conclusions

The bingo gaming industry in Ottawa and Ontario has experienced significant changes over the past decade. Bingo attendance and revenues have declined sharply with the net effect being that the number of bingo halls in Ottawa dropped from 11 in 2002 to only 4 today. Total bingo hall attendance has declined by almost 1.3 million players from 1,955,303 in 2000 to only 707,665 in 2007. The bingo industry continues to face major challenges with technological change, shifting social values and changing demographics and emerging highly competitive alternative entertainment and gaming venues and products. This competitive market will place increasing pressure on the four remaining commercial bingo halls to close down which in turn will further reduce the already diminishing revenue pool for local charity organizations.

The Rideau Carleton Entertainment Centre (RCEC) is proposing to open a new Class A¹ bingo facility at its facilities at 4837 Albion Road in Ottawa under the Gaming Control Act administered by the Alcohol and Gaming Commission of Ontario (AGCO). The following report was prepared for RCEC to: 1) determine the impact that the new commercial facility would have on the local / regional bingo industry including existing halls and licensees, and 2) evaluate the potential of the local market to support the new facility.

The report findings were based on an analysis of several sources of information and data including: existing literature such as policy reports, discussion papers and media articles related to issues and challenges facing the bingo gaming industry and charity organizations; published reports and data from Statistics Canada that provide statistics on trends related to the bingo industry and charity revenues, and, an onsite intercept survey of 623 visitors to the RCEC.

The bingo gaming industry in Ottawa will continue to experience downward trends in attendance and revenues if the current competitive market environment remains. This declining trend will place increasing pressure on the four remaining commercial bingo halls to close down which in turn will further reduce the already diminishing revenue pool for local charity organizations. Over the past 4 decades, the regulatory framework in Ontario has changed considerably but these changes generally resulted in more comprehensive regulations. However, it was only in recent years that the Provincial government placed more focus on co-ordinated and promoting the bingo gaming industry (as opposed to just regulating) in response to declining attendance and revenues to charities. For example, the Ontario Bingo Development Fund was introduced in 2007 by AGCO to assist bingo charities to promote and market bingo activities.

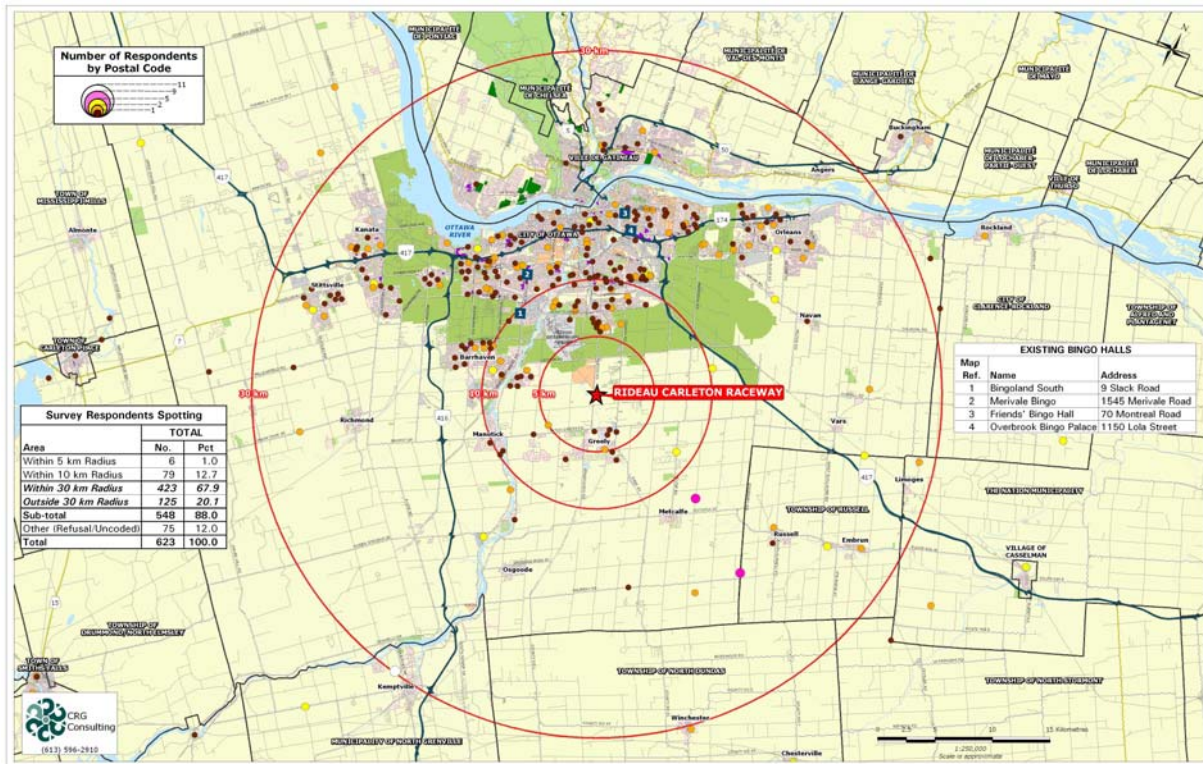
It is not expected that the proposed new bingo hall at RCEC will have a significant negative impact on the remaining existing halls for the following reasons:

- The new facility is the only bingo hall in the southern suburban area of the City whereas the existing four halls are located within the Green Belt. It is not expected that the proposed site will directly compete with the primary trade areas of existing bingo halls which depend on easy accessibility or proximity to residents within their respective communities for their core repeat players. On the other hand, public transit services are not available to the RCEC site which is accessible predominantly by car (OLG does provide shuttle service from South Keys). Walk-in traffic is also very limited because of its rural, peripheral location.
- The primary trade area or potential bingo player pool for the proposed bingo hall will come from visitors already coming to the site for other entertainment venues including slot machines and horse racing. The current RCEC functions as a regional entertainment destination with over 85% of the visitors living beyond a 10 km radius including 23% that live beyond 30 km – see Figure 1.

¹ According to AGCO, a Class A bingo hall is where four or more bingo events are conducted in any seven day period during the registration period of the commercial hall owner or operator. A Class B hall is the same except the hall is operated not for profit by a charitable or religious organization (licensee). A Class C hall has fewer than four events in any seven day period.



Figure 1
Distribution of Intercept Survey Respondents



See page 18, Figure 8 for an enlarged view

- It is also expected that the new facility will attract new potential bingo players from the larger South Nepean / Riverside South area which are the fastest growing residential communities in Ottawa today and will continue to be major growth areas for the next twenty five year planning horizon.
- The bingo operation offers a unique product that is very different to the more traditional bingo playing formats. The Rapid Split the Pot Bingo allows players to play as many or as few games that they desire. The objective of this type of bingo game is to allow visitor to RCEC to combine bingo other on site entertainment activities as well as other special events. The aim is to enhance the total entertainment (full service) value for visitors to RCEC as a point of destination whereas traditional bingo halls are targeted at only longer duration bingo players.
- It is likely that, in light of current bingo gaming industry trends and the increasing competition for the entertainment dollar due to technology, other entertainment venues, changing social attitudes and demographics, that the remaining 4 bingo halls will continue to experience serious challenges with the very real risk that more if not all of the facilities closing down in the near future even if the proposed new facility is not implemented.
- On the other hand, the proposed RCEC bingo hall has the potential of at least increasing the survival chances of the bingo industry in Ottawa and even providing a positive stimulus to the industry as well as to charity organizations that depend on bingo revenues to provide much needed community services. The RCEC proposal follows other recent successful efforts in Canada as well as the United States with respect to developing a full service / entertainment destination centre.



- Moreover, for the first time, the bingo gaming industry in Ottawa will be able to leverage the long standing, successful experience of Rideau Carleton Raceway in gaming entertainment.

The following summarizes the key findings related to the assessment of the market potential to support the proposed bingo facility:

- It is estimated, based on the results of the intercept survey, that 16.4% of the current visitors would come back just play bingo in the Rapid Split the Pot Bingo gaming format. Another 24.7% would play bingo in combination with other on-site entertainment activities. These results show strong support for the new bingo operation from existing clientele.
- It is expected that an increasing number of new visitors or patrons will come from the southern Ottawa suburban communities of Riverside South and South Nepean as these communities represent major population growth areas of the city. In addition, the continued aging of the baby boomers segment of the population base will further provide additional support in view of the fact that over 75% of the current visitors to RCEC are aged 50 years and over.
- The proposed bingo facility will enhance the synergy of RCEC as an entertainment destination when combined with other on-site entertainment venues. This is in line with similar emerging trends related to the development of 'racinos' and large entertainment centres as regional destination points.
- The proposed bingo operation will compliment other existing entertainment facilities because the bingo gaming format allows players to play as many or as few games that they desire.
- Table 1 (below) summarizes the potential impact of the proposed gaming facility in terms of revenues to local charities and the City of Ottawa.

Table 1	
Total Estimated Bingo Players at proposed RCEC facility (Annual)	612,000
Total Estimated Revenue to Charities (Annual)	\$725,000
Total Estimated Licensing Revenue to City of Ottawa (Annual)	\$375,000

** Estimate is based on 2006/07 attendance to OLG Slots only, the most current year of OLG published data. Estimate is considered to be modest forecast for the following reasons: attendance has likely increased since 2006; OLG attendance excludes visitors to RCEC who did not play at the Slots; estimate excludes incremental changes to total bingo gaming player pool due to population growth in the primary trade area and the City of Ottawa.*



1.0 Background: Purpose and Approach of Study

The bingo gaming industry has experienced significant changes over the past decade in Ottawa as well as in Ontario and Canada overall. These changes have all been negative with respect to bingo operations and the future outlook continues to remain uncertain and bleak. The decline in bingo attendance and revenues has negatively impacted charities that strongly depend on bingo activities for revenue to support much needed services to local communities.

The Rideau Carleton Entertainment Centre (RCEC) is proposing to open a new 'Class A'² bingo facility at its facilities at 4837 Albion Road in Ottawa under the Gaming Control Act administered by the Alcohol and Gaming Commission of Ontario (AGCO). The following report was prepared for RCEC to: 1) determine the impact that the new commercial facility would have on the local / regional bingo industry including existing halls and licensees, and 2) evaluate the potential of the local market to support the new facility.

The results of the market study are provided in this report. The market study approach and report structure is based on the requirements stated in AGCO's "Criteria and Procedures for Establishing Bingo Halls" manual and specifically the market study elements defined in Appendix 4 of the manual for proposed new commercial bingo halls.³ These elements are summarized as follows:

- Population profile within 5 to 20 kilometres of the proposed site;
- Transportation/accessibility review;
- Outline of the Primary Trading Area;
- Outline of Demonstrated Demand for a New Bingo Hall by Charitable Organizations, and;
- Analysis of Economic Impact of the New Hall on Existing Bingo Halls and Charitable Licensees.

For this market study, several sources of information and data were reviewed and gathered including: existing literature such as policy reports, discussion papers and media articles related to issues and challenges facing the bingo gaming industry and charity organizations; published reports and data from Statistics Canada that provide statistics on trends related to the bingo industry and charity revenues, and, an onsite intercept survey of visitors to the RCEC. The intercept survey was conducted by CRG Consulting between 12:00 p.m. and 8:00 p.m. on November 20 and 21, 2008. A total of 623 randomly selected visitors were surveyed following a structured questionnaire format. The survey questionnaire is provided in Attachment 1. The results of the survey are incorporated into the following market study sections as appropriate. The results of the survey are considered to be accurate within ± 3.92 percentage points, 19 times out of 20.

² According to AGCO, a Class A bingo hall is where four or more bingo events are conducted in any seven day period during the registration period of the commercial hall owner or operator. A Class B hall is the same except the hall is operated not for profit by a charitable or religious organization (licensee). A Class C hall has fewer than four events in any seven day period.

³ Registrar of Alcohol and Gaming, Alcohol and Gaming Commission of Ontario, Criteria and Procedures for Establishing Bingo Halls. Report 303E (06/05).



2.0 Overview of the Bingo Gaming Industry

This section of the report contains a summary overview of recent trends, issues and challenges in the bingo industry focussing on Ontario and the City of Ottawa. This overview, in turn, provides the situational context for better understanding the local impact of the proposed new bingo hall at RCEC.

2.1 Bingo Gaming Regulatory Framework in Ontario

The *Criminal Code* establishes the framework for legal gaming in Canada. This allows for charitable gaming run by charitable and religious organizations to raise funds for charitable activities in Ontario. Flowing from these *Criminal Code* provisions, that were initially put in place in 1969, the Lieutenant Governor in Council established in 1970 two authorities to issue licences - the Minister of Consumer and Commercial Relations and municipal councils.

The Alcohol and Gaming Commission of Ontario (AGCO) was established in February 1998 as a quasi-judicial regulatory agency reporting to the Ontario Minister of Government and Consumer Services. AGCO's mandate is "to regulate the alcohol and gaming sectors in accordance with the principles of honesty and integrity, and in the public interest." The rules governing the operations of charity bingos are set by AGCO. Municipalities license the operations of charitable bingos and are permitted to collect a \$165 fee per bingo event/game.

Bingo Hall operators and the charities are organized on a province-wide basis and are represented by the Registered Gaming Suppliers of Ontario Association and the Ontario Charitable Gaming Association, respectively.

The criteria and procedures for establishing bingo halls are set by AGCO and are summarized below for proposed new facilities:

- The application for registration must be accompanied by a covering letter addressed to the Registrar of Alcohol and Gaming which clearly outlines that the application is in connection with a new bingo hall proposal;
- The proposed bingo hall meets municipal zoning bylaw requirements;
- The applicant provides public notice to open a new bingo hall;
- The application must be approved by municipal council;
- The applicant forwards the municipal council's approval to the Commission. If the applicant currently holds a valid Certificate of Registration as a gaming supplier, as is the case with Rideau Carleton Raceway, the applicant must simply request an amendment to its existing registration to add a new hall.

Over the past 4 decades, the regulatory framework has changed considerably in response to changing needs and issues. These changes generally resulted in more comprehensive regulations. However, it was only in recent years that the Provincial government placed more focus on co-ordinated and promoting the bingo gaming industry (as opposed to just regulating) in response to declining attendance and revenues to charities. For example, the Ontario Bingo Development Fund was introduced in 2007 by AGCO to assist bingo charities to promote and market bingo activities.

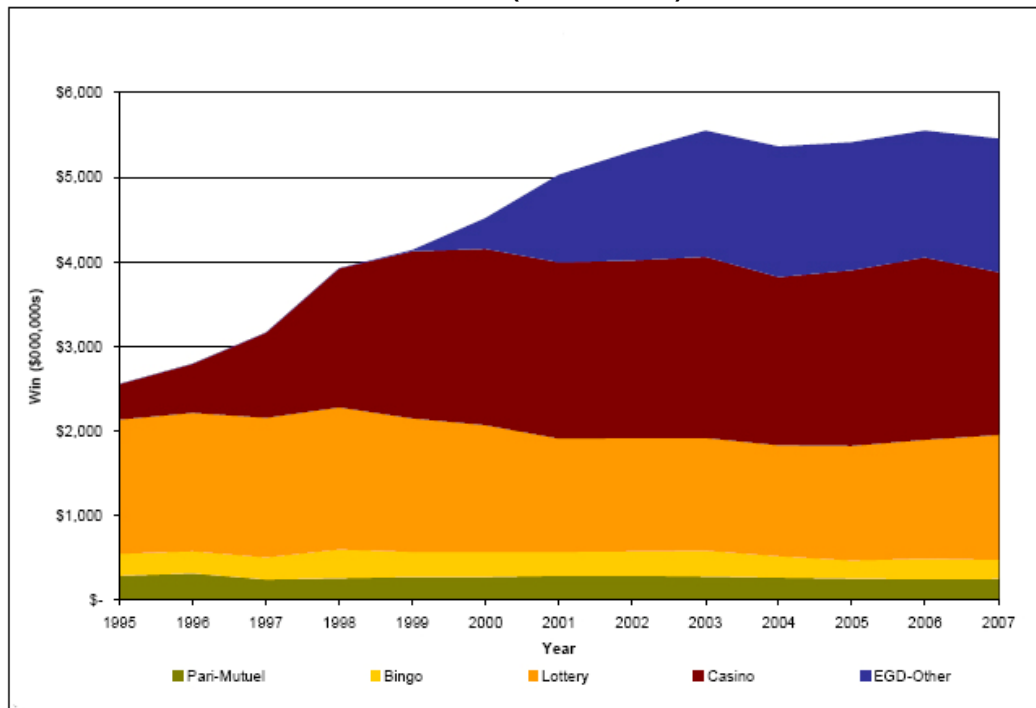
Rideau Carleton Raceway Holdings Ltd., owner of the Rideau Carleton Entertainment Centre, is a registered Gaming Supplier under the Ontario Gaming Control Act. As noted earlier, the company is also the landlord for the OLG Slots at Rideau Carleton.



2.2 Bingo Gaming Industry Trends

The bingo gaming industry has undergone significant changes over the past decade in Ontario as well as the rest of Canada. In Ontario, which generates the most bingo revenue of any province, the industry produced \$1.1 billion in gross revenue in 1998, declining by about 15% in 2005⁴. ACGO estimated that bingo wagering for the Province totaled \$633 million in FY 2007/08 while the number of bingo halls in Ontario declined from 230⁵ in 1998 to 79 in 2008⁶. The following charts show historical bingo trends in Ontario.

Figure 2
Total Ontario Gaming Win by Type of Game¹
1995-2007 (Fiscal Years)



Source: Alcohol and Gaming Commission of Ontario, New Bingo Revenue Model: One Year Review – Key Findings Report (October 2008) Prepared by HLT Advisory Inc. 1. Win = Total Wagering less prize money

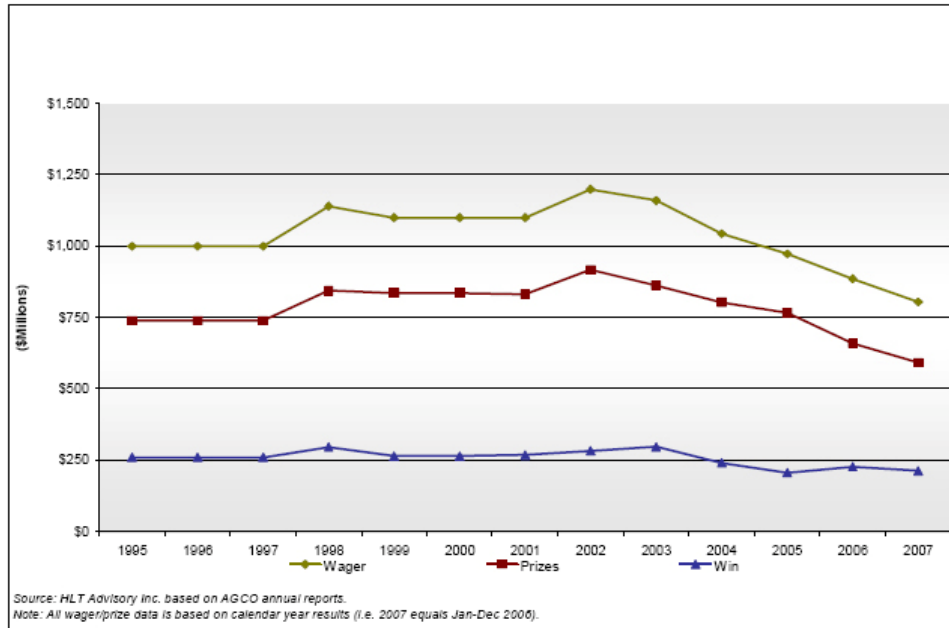
⁴ Canadian Business Magazine, "Game Plan": September 11-24, 2006. Volume 79 Issue 18

⁵ City of Toronto, Briefing Note – Gaming and Bingo Revenue in Toronto. January 18, 2006

⁶ Alcohol and Gaming Commission of Ontario, New Bingo Revenue Model: One Year Review – Key Findings Report (October 2008).



Figure 3
Historical Ontario Paper Bingo Trends – Wagering, Prizes and Win
1995-2007



Source: Alcohol and Gaming Commission of Ontario, New Bingo Revenue Model: One Year Review – Key Findings Report (October 2008) Prepared by HLT Advisory Inc.

Several factors have contributed to the decline in bingo revenues. According to various sources, bingo revenues have been in decline since 1994 when casino’s and later racetrack slots began opening across the province. The first Ontario casino opened in Windsor in 1994 and today there are 10 in the province. There are also 17 racetracks equipped with slot machines which the Ontario government allowed in 1998. Other risk factors impacting bingo revenue include changing consumer needs and Internet or on-line gaming and shifts in social attitudes. To many bingo hall operators and charity organizations, the most damaging of all was the province wide smoking ban, adopted in June 2005. Bill 164, An Act to rename and amend the Tobacco Control Act, 1994, required that all bingo halls become completely smoke-free by June 2006.

Since bingo events have generally developed in local communities or neighbourhoods, only a handful of companies own multiple facilities. The strain on the industry caused many single-hall operators to shut down, but even the more financially sound multi-hall owners were forced to consolidate and restructure in order to improve the financial bottom line.

The decline in the number of bingo halls together with bingo attendance and therefore bingo revenues has had a significant impact on charity organizations. The Committee to Save Charity Bingo estimated in 2006 that Ontario’s smoking ban would result in the closure of 48 out of the 100 charity halls over the following year with charity funding losses exceeding \$50 million.⁷ Bingo revenue in the City of Toronto declined from \$3,078,000 in 1999 to \$2,167,912 in 2005 while the number of licenses or transactions dropped from 1,263 in 2000 to 787 in 2005. The number of commercial bingo halls declined from 19 in 1998 to 7 in 1996 while revenues to charity organizations fell from \$9.9 million in 1998 to \$2.4 million in 2005.⁸ Declining bingo revenues also impacted revenues to municipalities in terms of reduced licensing fees.

⁷ The Committee to Save Charity Bingo, “McGuinty Smoking Ban, Day One: The Beginning of the End for Charity Bingo in Ontario: Press Release June 1, 2006.

⁸ City of Toronto, *ibid*.



AGCO has taken a number of strategic steps recently in an effort to modernize and stabilize the gaming industry in Ontario. In 2005, AGCO initiated a wide-scale public consultation with the bingo industry culminating in a number of strategic initiatives.⁹ One of the key initiatives was the implementation in May 2007 of a revamped cost sharing agreement between bingo hall operators and charitable organizations known as the New Bingo Revenue Model which also included the Ontario Bingo Development Fund for marketing and promotion. Electronic bingo has also been introduced as an initiative to revitalize the bingo industry. E-bingo has also allowed linking bingo halls and bingo games across the province which in turn increases the amount of prize winnings.¹⁰

A review of bingo trends one year after the introduction of the New Bingo Revenue Model was completed by HLT Advisory Inc. for AGCO. The following summarizes some of the key findings:

- Total bingo wagering for the 32 sample halls in Ontario declined from \$319 million in FY 2006 to \$299 million in FY 2007 and again to \$292 million in FY 2008. Average attendance also declined over the 3 years – 223,626 in 2006, 185,928 in 2007 and 160,647 in 2008.
- Bingo revenues were negatively impacted by the introduction of the province wide smoking ban. Based on a 32 bingo hall sample base, a 34% reduction in total profitability was experienced between 2006 and 2007. Between 2007 and 2008 a 2% increase in profitability was experienced.
- Charities experienced a 25% reduction in profits between 2006 and 2007 and a further 8% reduction between 2007 and 2008.¹¹

British Columbia recognized the need to make significant changes to the province's bingo industry in order to make it more competitive. In 2004, the British Columbia Lottery Corp. converted bingo halls into what it called "community gaming centres" as part of a rebranding strategy to retain existing players and attract newcomers.¹² The B.C. Lottery Corp. set a revenue record of \$2.6 billion in 2007, \$64 million more than expected. The increase was aided by higher revenues from bingo halls, a number of which now are equipped with slot machines. The revenues from the province's 30 bingo halls -- of which only 12 carry slot machines -- rose by more than \$41 million over 2006-07.¹³ AGCO has also made similar initiatives in refurbishing and "re-branding" bingo halls in Ontario but only in a few selected pilot projects.¹⁴

2.3 Bingo Gaming Industry in Ottawa

Ottawa's bingo industry has experienced the same decline in revenues, attendance and number of facilities. The City of Ottawa was also the leader in implementing no smoking regulations in public places and workplaces. Ottawa's smoking bylaw was approved in August 2001 almost 4 years before the province wide smoking ban. Competition for the local gaming dollar also came from Casino du Lac Leamy (formerly Casino de Hull) in March 1996 and the OLG Slots at Rideau Carleton Raceway in February 2000.

A report to City of Ottawa Council in February 2002 provided a review of current trends and emerging issues at the time.¹⁵ The report noted that charity bingos raised \$7.8 million for charity organizations in Ottawa. Attendance and profits for bingo halls which included 10 commercial facilities declined 15% and 13% between 2000 and 2001.

⁹ Alcohol and Gaming Commission of Ontario, *Modernization of Charitable Gaming: Direction and Priorities (Volume II)*. February 2007.

¹⁰ Ottawa Citizen, "Bingo Going Bust Without Patrons". November 9, 2008.

¹¹ Alcohol and Gaming Commission of Ontario, *New Bingo Revenue Model: One Year Review – Key Findings Report (October 2008)* prepared by HLT Advisory Inc.

¹² Canadian Business Magazine, *ibid*.

¹³ The Vancouver Sun, "Bingo Halls With Slots Lead To Record Haul For Lottery Corp." July 9, 2008.

¹⁴ Maclean's Magazine, "And Cash Cow Was Its Name-Oh". December 18, 2006. Volume 119 Issue 50.

¹⁵ City of Ottawa, *Ontario's Declining Charitable Bingo Revenues: A Four-Point Action Plan For Ottawa*. City Council Report ACS-2002-CRS-SEC-0009. February 28, 2002.



In 2002 there were 11 commercial bingo halls and 290 charities. Following the 2001 approval of the non smoking bylaw, local bingo charities argued that the bylaw had a significant negative impact on revenues. It was reported that by 2003, local charities lost \$4.7 million annually as a result of the non smoking bylaw. The City, on the other hand, argued that declining revenues were due to other factors such as shifts in public tastes towards casinos and slots¹⁶.

Similar debates occurred after the Province wide in 2005 between charities, bingo operators and AGCO. A 2008 AGCO report, however, stated that the bingo business negatively impacted by the introduction of the province wide smoking ban. A 32 hall sample base experienced a 34.0 percent reduction in total profitability between 2006 and 2007.¹⁷

Table 2 summarizes the overall changes for commercial bingo halls between 2000 and 2007. The changes over the 7 year period clearly illustrate the decline in bingo gaming activity. The number of players declined by about 1.3 million or 2/3 while total revenue dropped by approximately one-half. Charity profits dropped from \$9.2 million in 2000 to \$4.7 million in 2007. Attachment C summarizes activity information for each bingo hall by year between 2000 and 2007.

Table 2		
Changes in Bingo Hall Profile Summaries: 2000-2007		
	2000	2007
# Commercial Bingo Halls	11	4
# Players (Total Attendance)	1,954,928	685,442
# Events	9,932 (2001)	6,400
# Charities	290 (2001)	110
Total Revenue	\$88.9 mil	\$44.5 mil
Total Profit To Charities	\$9.2 mil	\$4.7 mil

Source: City of Ottawa, *Ontario's Declining Charitable Bingo Revenues: A Four-Point Action Plan For Ottawa*. City Council Report ACS-2002-CRS-SEC-0009. February 28, 2002.

Today, there are only 4 commercial bingo halls left – Friends Bingo Hall (70 Montreal Road), Overbrook Bingo Palace (1150 Lola St), Bingoland South (9 Slack Road) and Merivale Bingo (1545 Merivale Rd). Three bingo halls closed in 2002 (Hunt Club, Club 90 and Kanata) followed by Blackburn Hamlet in 2003. Side Door, Patro and Rendez Vous closed in 2006. The locations of the 4 remaining commercial bingo halls are shown in Figure 5.

There are also 2 bingo halls classified as exempt¹⁸ from registration – Knights of Columbus (Vanier) and Salle St Francois. These two halls had a total attendance of 22,200 in 2007 and about \$188,000 profit generated for charities. A third exempt bingo hall, Legion Greely, closed after 2004.

The number of charities has declined from 290 in 2001 to 110 in 2008 with revenues of about \$5 million¹⁹ compared to \$7.7 million in 2001. According to the 2009 draft Budget, Lottery fees paid to the City in 2008 was approximately \$1m compared to \$1.36 million in 2001. In comparison, 2008 revenues to the City from Slots at Rideau Carleton Raceway were approximately \$3.95 million compared to \$2.60 million in 2002.

Figure 4 shows the annual total attendance for all bingo halls (including exempt) located in the City of Ottawa from 2000 to 2008. According to the chart, total attendance has declined steadily each year since

¹⁶ The Ottawa Citizen, "Bingo Operators Blame Losses On Smoking Ban". February 11, 2003.

¹⁷ AGCO Ibid.

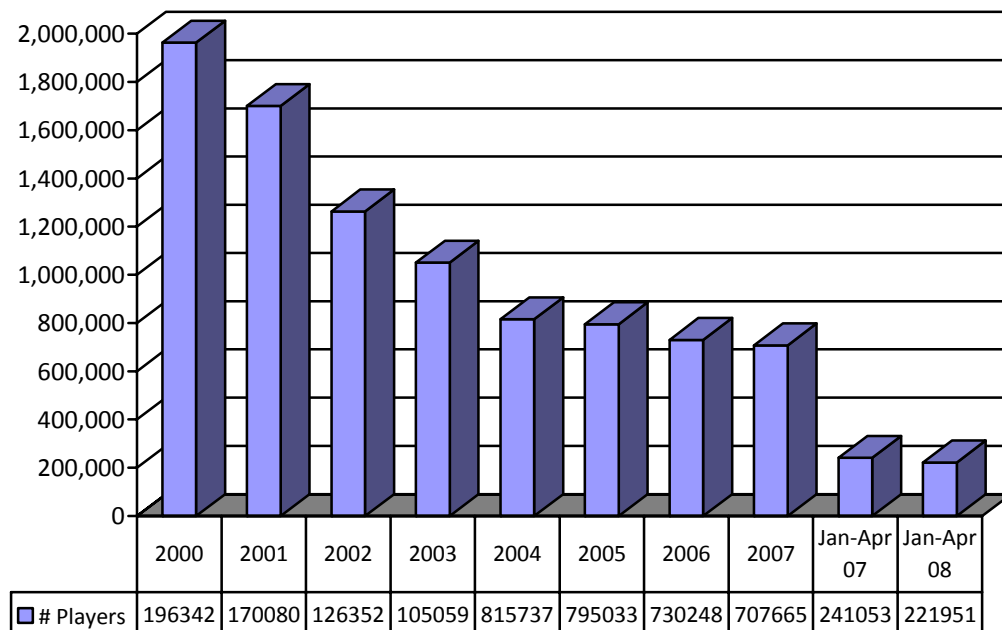
¹⁸ Exempt bingo halls do not require registration if no more than one bingo event is conducted during any seven day period or licensees that conduct bingo events in their own premises.

¹⁹ Internal staff memorandum.



2000 including the first 4 months in 2008 compared to the same time period in 2007. The sharpest decline occurred between 2000 and 2004. Individual bingo halls did experience gains in attendance during those years following the closures of other bingo halls as they picked up displaced players. However, the remaining bingo halls started to experience a return to declining attendance levels in following years (see Attachment C).

Figure 4
Total Attendance Ottawa Bingo Halls: 2000-2008



Source: City of Ottawa



Figure 5
Location Map: Existing Bingo Halls and Proposed RCEC (Rideau Carleton Raceway) Bingo Facility





3.0 Market Study: Proposed Bingo Hall at Rideau Carleton Entertainment Centre

3.1 Existing RCEC Facilities and Summary of Proposed Bingo Operation

The Rideau Carleton Entertainment Centre (RCEC) was established in 1962 and currently operates a 5/8 mile year-round harness horse racetrack with 15 off-track betting locations and a 650 seat dining room / restaurant. The paved parking area has 2,500 parking spots. RCEC is also the landlord to OLG (Ontario Lottery and Gaming) Slots at Rideau Carleton Racetracks with 1,250 slot machines. The OLG Slots was opened on February 16, 2000. According to OLG, there were 1,490,000 patrons to the Slots at Rideau Carleton Raceway in FY 2005/06.²⁰

Figure 6
Aerial View of RCEC Site



²⁰ OLG, Annual Report: 2005/2006



RCEC is located in the southern part of the City of Ottawa in a predominantly rural area. The site is 6 km south of Lester Road which approximately marks the edge of the built up urban area in this part of the City – see Figure 6.

The proposed bingo facility will be located in an existing second floor banquet hall which has a 579 seating capacity. The bingo facility has elevator services for handicap accessibility.

Of the 4 remaining existing commercial bingo halls only one is just within the 10 km radius from the proposed RCEC site – see Figure 5. All of the existing halls are located within the Greenbelt or inner city. Until recently, there were bingo halls located in suburban communities including Orleans, Blackburn Hamlet and Kanata. In addition, there are no other bingo halls located in surrounding Ontario communities outside the City of Ottawa and within a 30 km radius of the RCEC site. One facility in Kemptonville, South Gower Bingo, closed in early 2008.

The proposed bingo operation will offer a **Rapid Split the Pot Bingo**. The Split the Pot Bingo part splits the sales of the game or session (the pot) between the winning player and the bingo hall (or House). For this proposal, the total prize board per session will be \$1,500 and all games will be a split pot with a \$50 maximum per game. The **Rapid** component is considered to be the unique aspect of the bingo game. It allows players to play as many or as few games that they desire. Players do not pay as much as would normally cost to play but the payouts are also smaller.

The objective of the proposed bingo facility and bingo gaming format is to increase the overall attractiveness of RCEC as a “destination racino” (combination of horse racing track and casino). The additional bingo facility will provide increased gaming / entertainment opportunities to visitors. Players may combine bingo with other on site RCEC activities including dining, harness horse racing/para-mutuel betting, and slot machines/casino as well as other special events such as boxing, cruise nights and vintage car shows. The co-location of multiple entertainment choices has a potential synergy effect in terms of attracting more visitors to the destination centre than would be possible if each entertainment activity was located in separate facilities. Entertainment centres like racinos represent emerging real estate development opportunities and are becoming major regional entertainment destinations as well as mixed use centres which include retail, conference facilities, hotel accommodation etc.²¹

3.2 Market Study Elements

Population Characteristics

Table 3 summarizes selected social and demographic characteristics within 5 and 10 km radii from RCEC as well as for the City of Ottawa in total. The total 2006 population within the 5 km radius was only just under 6,000 people which reflects the more rural environment of the area surrounding the RCR site. Compared to the rest of the city, the population residing within this area tends to be higher income mature family households living in single family homes.

The population level increases significantly when the radius is doubled to 10 km which captures most of the Hunt Club community as well as the eastern portion of the more suburban Barrhaven/Riverside South communities and Greely to the south. Although household incomes are lower compared to the 5-km zone, they are still above the City average. This zone is also characterized as being family oriented with a lower representation of more senior population members compared to the city in total.

²¹ University of Arizona Race Track Industry Program, 2005 Symposium Transcripts
<http://ag.arizona.edu/rtip/symposium/index.html>.

See also Business Edge News Magazine (Ontario), “Racinos Give Horse Industry Ray of Hope”. September 19, 2008 (Vol. 4 No. 19)



**Table 3
Population Characteristics of Market Area**

	5 km radius	10 km radius	City of Ottawa Total
2006 Total Population	5,942	120,272	812,130
% By Age Group			
0 to 19	28	28	24
20 to 29	9	12	14
30 to 54	43	41	38
55 to 64	11	10	11
65 +	8	9	12
Median Household Income (2005)	\$90,600	\$76,500	\$69,800
Average Household Income (2005)	\$102,000	\$90,400	\$85,100
% Households with Total Income > \$100 K (2005)	45	34	31
Total Occupied Dwellings (2006)	2,026	42,537	321,100
% Owned	92	76	66
% Single Detached	88	48	43
Average Value	\$321,700	\$307,100	\$297,700

Source: Statistics Canada, 2006 Census

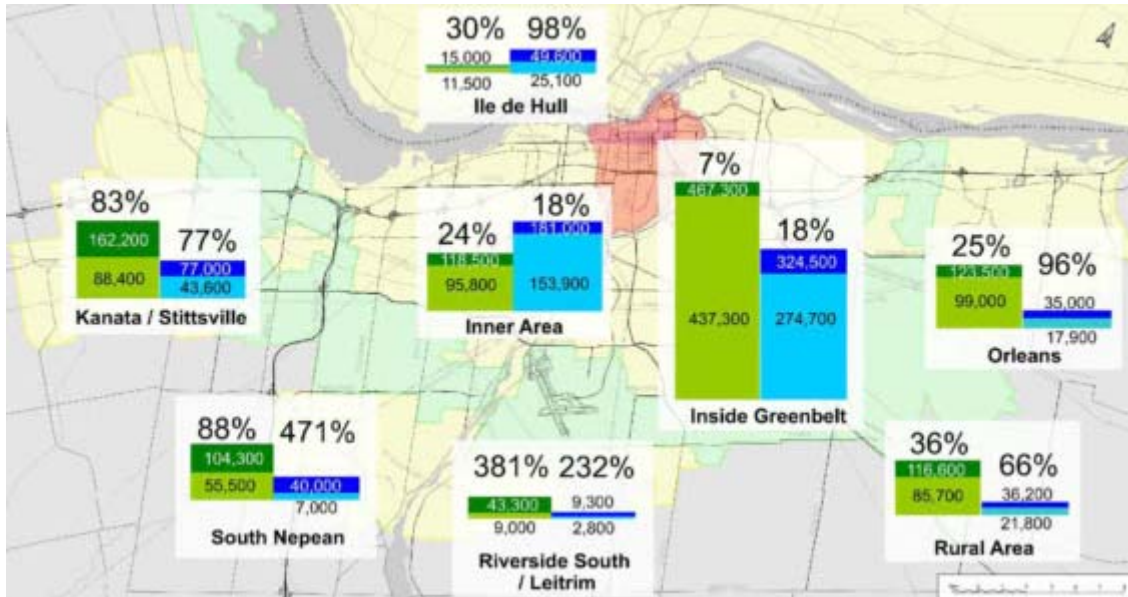
The 10 km zone contains the Riverside South community which has experienced substantial population growth over recent years and contains several major new residential subdivisions. The City of Ottawa anticipates continued strong population growth in this area.

The area beyond the Greenbelt and east of Rideau River includes major new housing developments in Riverside South and to a lesser extent in the Leitrim area. It is anticipated that Riverside South and the larger Barrhaven community will remain as a major population growth centre in the City over the long term. According to the City's current Transportation Master Plan / Official Plan reviews, population in Riverside South/Leitrim area is projected to increase from 9,000 in 2007 to 43,300 in 2031 or 232% - see Figure 7.²² On the west side of the Rideau River, South Nepean is expected to grow from 55,500 to 104,300 or 471%.

²² City of Ottawa, Transportation Master Plan Update: Downtown Transit Solution and Rapid Transit Network – Recommendations. Report to Joint Transportation and Transit Committee. April 15, 2008. Ref N°: ACS2008-PTE-PLA-0016



Figure 7
Population Projections: City of Ottawa Growth Areas
2007-2031



Source: City of Ottawa, *Transportation Master Plan Update: Downtown Transit Solution and Rapid Transit Network – Recommendations*. Report to Joint Transportation and Transit Committee. April 15, 2008. Ref N°: ACS2008-PTE-PLA-0016

The City is also planning for intensive development in the South Nepean / Barrhaven Town Centre which will be located on the proposed Rapid Transit network. The City's Community Design Plan anticipates a population of 22,500 in the Town Centre. Moreover, the current recommended transit network in the City's Transportation Master Plan calls for a rapid Light Rail transfer station in Riverside South (Bowesville) with a link to the Barrhaven Town Centre via a bus rapid transit link.

The absolute growth in population or households will result in increased demand or consumption of a wide range of goods and services including entertainment such as gaming. For example, the projected increase in population of about 93,000 in Riverside South and South Nepean over the next 25 could potentially result in an incremental increase of \$7.8 million in gaming expenditures annually²³.

Transportation / Accessibility Review

Although located in a more rural setting, RCEC provides easy access to automobiles via Albion Road as well as Bank Street. The main north-south routes are also well connected to the west-east routes of Mitch Owens Road and Leitrim which provide access points to Highway 416 to the west and/or Highway 417 to the east. The RCEC site provides ample free parking with 2,500 paved parking spaces. Regular public transit service is not available to the RCEC facility but the OLGC operates a bus shuttle service from South Keys every 30 minutes. Because of its relatively remote location, there are no walk-in visitors. Out-of-city tour bus visitors also represent a significant number of visitors to RCEC for both day and overnight trips.

Based on the population growth expectations described above, it is expected that an increasing proportion of total future visitors to RCEC and therefore to the proposed new bingo hall will come from new residential subdivisions and communities in the southern suburban areas of Ottawa (Riverside South

²³ The \$7.8 million expenditure on gaming was estimated by dividing the net increase in population (83,000) by the average persons per household (2.5) for Ottawa as published in the 2006 Census and multiplying the resulting number of households (37,200) by the average household expenditures (net of winnings) in Ottawa on games of chance (\$210) as reported in Statistics Canada's Survey of Household Spending (CANSIM Table 203-0001).



and South Nepean). As these areas experience more residential development and population growth, the public transit services will also expand which will likely include bus service to RCEC since it is a major destination point.

Outline of Primary Trade Area

The primary trade area for the proposed bingo facility is RCEC facility itself – that is, patrons who come to the Centre because of other available entertainment facilities. Of the total 623 visitors interviewed, the large majority are frequent repeater clientele. 87.8% of the interviewees visited Rideau Carleton Raceway at least once every two month with 48.8% stating that they visited at least once a week. 76.4% of the total visit RCEC to play the Slots. 14.1% stated that they also played bingo and of that group, 58.3% played at least once a month.

When asked if they would play Rapid Split the Pot Bingo (interviewees were given a brief description of this form of bingo), a significant number, 16.4%, did say they would consider coming to RCEC just to play bingo while another 24.7% of the total sample stated they would consider playing in combination with other activities.

Based on the survey results and using the number of patrons published in OLG's 2005/06 Annual Report, the proposed bingo hall could generate a total potential of 612,000 bingo players on an annual basis from the Slots existing clientele base. This total would be larger if other non-Slot visitors RCEC were added. Also, the number of ORG patrons would have likely increased since FY 2005/06. In comparison, there were a total of almost 2 million bingo players in 2000 when there were 11 commercial bingo halls in the City of Ottawa. – see Table 2, which have dropped in number to 4 in 2008. Total attendance has declined by almost 1.3 million players between 2000 and 2007. The 612,000 bingo players at the proposed new bingo facility represents, therefore, a significant potential re-capture of the total bingo player patrons that have been lost due to previous bingo hall closures.

It is further estimated that the 612,000 potential bingo players will generate \$725,000 for charity organizations and another \$375,000 to the City in licensing revenue. These projections are also considered to be modest in that they are based on 2005/06 patron numbers, the most recent year published by OLG. Attendance levels have increase since then. The OLG number also excludes RCEC visitors who did not play on the slot machines but came for horse racing, dining or other on-site event. The estimated projections also exclude incremental change in total bingo players due to overall population growth both in the primary trade area as well as the larger metro Ottawa region.

Selected Results: On-Site Intercept Survey

Why are you visiting the Rideau Carleton Raceway today?

Response	(n)	(%)
Play in the casino	476	76.4
To watch horse racing	52	8.4
To eat in the restaurants	48	7.7
Other events	47	7.5
TOTAL	623	100



How often do you visit the Rideau Carleton Raceway?

Response	(n)	(%)
Daily	36	5.8
At least once a week	288	43.0
2-3 times per month	122	19.6
Once every two months	121	19.4
Once a year	39	6.3
Rarely	20	3.2
First time	12	1.9
Other	5	0.8
TOTAL	623	100

If “Rapid Split the Pot Bingo” was offered at the Rideau Carleton Raceway, would you consider playing at the RCR?

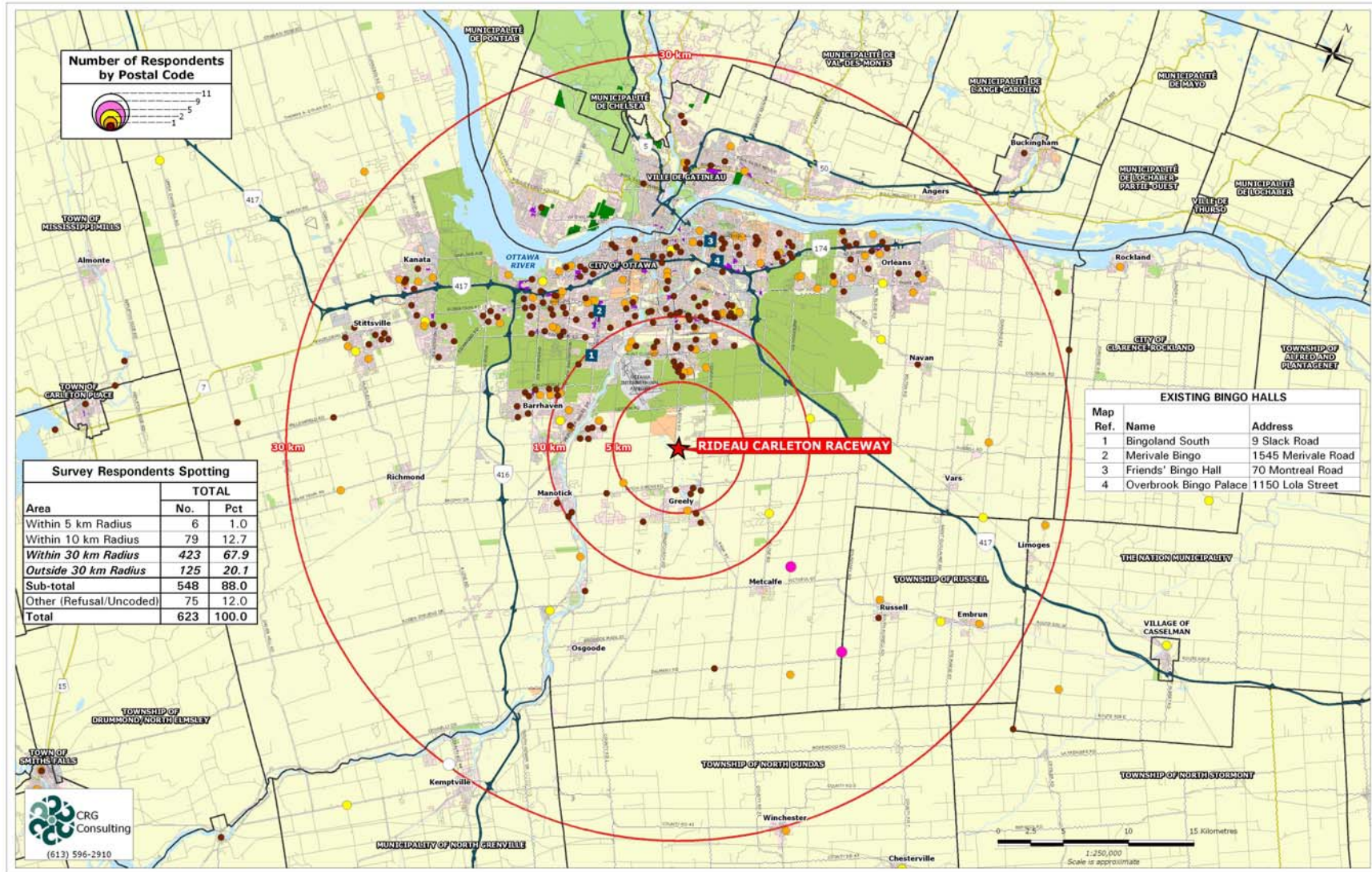
Response	(n)	(%)
I would consider coming to the RCR/Casino just to play Bingo	102	16.4
I would consider coming to the RCR/Casino to play Bingo along with other activities	154	24.7
I would not consider coming to the RCR/Casino just to play Bingo	342	54.9
Unsure	25	4.0
TOTAL	623	100

Source: CRG Consulting Intercept Survey

Since RCEC currently functions as a major destination point in the Ottawa-Gatineau metropolitan area for local and out-of-town visitors and tourists, the current primary trade area for the existing on-site activities extend well beyond the “neighbourhood” based trade areas that are more typical of bingo halls. CRG’s intercept survey asked people for their area code in order to estimate the origin distribution of visitors to the RCEC. Of the total 548 respondents who provided their home address postal code, 423 or 77.2% lived within a 30 km radius around RCEC including 14 or 2.6% from Gatineau. Only 6 respondents or 1.1% of the total lived within 5 km of RCEC while 79 or 14.4% lived within 10 km. 125 (22.8%) respondents lived outside the 30 km radius including 8 from Quebec Province. No respondents indicated they lived in other provinces (beyond Ontario and Quebec) or in the United States but it is worth noting that the interview was undertaken during November which is not a prime summer or winter tourist month. Figure 8 shows the distribution of visitors to RCEC by place of residence based on the sample of 548 respondents to the intercept survey.



Figure 8
Distribution of Intercept Survey Respondents



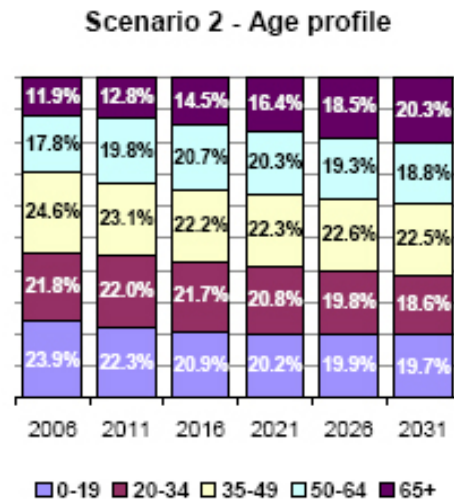


The distribution of visitors reflects the role of RCEC as a major destination centre in the larger Ottawa metropolitan area with just over 85% of the visitors living outside the 10 km. radius.

It is also expected that the trade area within close proximity of RCEC (i.e. within the 10 km radius) will also capture surrounding areas and communities since bingo halls have traditionally developed their repeater customer base from within the neighbourhoods they are located in. The proposed bingo facility at RCEC will be the only bingo hall outside the Greenbelt/inner city of Ottawa. – see Figure 5. The closest existing bingo hall is Bingoland South which is just within the 10 km distance radius from RCEC. As noted earlier, the projected increase in population of about 93,000 in Riverside South and South Nepean over the next 25 could potentially result in an incremental increase of \$7.8 million in gaming expenditures within the primary trade area.

Another important demographic trend that will impact on future demand for gaming / entertainment venues including bingo is the overall aging of the baby boom bulge in the population pyramid. Almost one-half (48.2%) of the surveyed visitors to RCEC were over the age of 60 years. 75% of the 623 visitors interviewed were over the age of 50 years. Based on the City of Ottawa’s recent population projections, approximately 50% of the growth in population to 2031 will be growth in the age group over 65 years old. 39% of the total population in 2031 will be over 50 years of age compared to 30% in 2006 – see Figure 9.

Figure 9
Population Projections: Distribution by Age Category
City of Ottawa: 2007-2031



Source: City of Ottawa Growth Projections for Ottawa 2006-2031
November 2007 Publication # 9-22
Note: Scenario 2 is the Reference Projection selected by the City for planning purposes.



Selected Results: On-Site Intercept Survey

What is your age?

Response	(n)	(%)
25-30	9	1.4
31-40	34	5.5
41-50	109	17.5
51-50	171	27.4
Over 60	300	48.2
TOTAL	623	100

Source: CRG Consulting Intercept Survey

Demand for New Bingo Facility by Charitable Organizations

RCEC management’s evaluation of a new bingo facility during the initial phase was in part the result of discussions with local charities asking RCEC about the possibility of expanding the entertainment program at the facility. As noted before, revenues received by charities from bingo operations have declined dramatically in Ontario and Ottawa over the past decade. As a result, the number of charities receiving bingo-related revenues has declined from about 290 in 2001 to only 110 in 2008. The shrinking revenue-pie has, of course, resulted in great difficulties for these organizations to provide services to meet community needs. This in turn has placed greater pressure on local governments for financial assistance in times of limited resources. The decline in bingo halls has also resulted in long wait times, at least one year, for new charities wishing to register with the few remaining bingo halls.

The list of charities that have expressed firm interest in the proposed new bingo hall at RCEC is provided in Attachment 2. As noted in earlier, the proposed new bingo facility can potentially generate \$725,000 annually for local charities.

Economic Impact of the New Hall on Existing Bingo Halls

From the total 623 people surveyed, 88 respondents or 14.1% indicated that they do visit bingo halls in the area. Of these 88 bingo players, the majority were frequent players with 60.3% stating that they played at least once a month (one-third said they play at least once a week). The 88 bingo players also preferred to play in bingo halls as opposed to online or the internet (97.6% of the total 623 survey population stated that they did not play bingo online). As noted previously, 16.4% of those surveyed stated that they would come to RCEC just to play bingo with another 24.7% indicating that they would combine bingo playing with other activities.

Selected Results: On-Site Intercept Survey

Do you visit/play Bingo in various Bingo Halls in the area? What are the names of the Bingo Halls?

Response	(n)	(%)
Yes	88	14.1
No	534	85.7
Refused	1	0.2
TOTAL	623	100



How often do you visit the Bingo Halls?

Response	(n)	(%)
At least once a week	25	33.0
Once a month	22	27.3
2-3 times per month	7	8.0
Once every two months	13	15.9
Once a year	9	10.2
Rarely	5	5.7
TOTAL	88	100

Do you play Bingo online?

Response	(n)	(%)
Yes	14	2.2
No	608	97.6
Not sure/don't know	1	0.2
TOTAL	623	100

Source: CRG Consulting Intercept Survey

The above survey results indicated that while the proposed new bingo hall may attract players from other existing bingo halls in the area but that the number that would be displaced would be relatively small.

Other important considerations are as follows:

- There are only 4 bingo halls remaining in the City and all of these are located within the Greenbelt or inner-city. The proposed RCR bingo hall is not considered to be located within the primary catchment areas of existing bingo halls. Furthermore, the proposed RCR facility will only be accessible by car since there are no existing public transit services to the site (OLG does run a shuttle bus service from South Keys).
- The *Rapid Split The Pot Bingo* gaming format is not designed to retain bingo players for long periods of time as is the case with more traditional playing formats. Instead, it is aimed at providing an alternative gaming venue as part of a “full service” entertainment destination. As noted above, the majority of 88 respondents who indicated that they do play bingo at other halls are also frequent players. It is likely that these frequent players will continue to patronage bingo halls especially if they are conveniently located.
- In terms of bingo hall facilities, the choices or opportunities for players to play bingo were significantly greater when there were 11 bingo halls in the City. Now that there are only 4 remaining bingo halls, the proposed new bingo hall at the RCEC location will provide a much needed added choice or opportunity for bingo players in the Ottawa area. This includes attracting back previous bingo players who decided to spend their entertainment dollar on venues because one of the 7 halls that have closed over the last two years was located in their neighbourhood. These ex-bingo players would represent key market targets for the new facility since there is good probability that they now visit the RCEC because of its more complete and diversified entertainment package.
- Without the new proposed RCEC facility, it is very likely that the declining attendance and revenues for existing bingo halls will continue in the near future with a very real probability that more if not all will close down also. The RCEC proposal follows other recent successful efforts to rejuvenate bingo gaming by building on its existing entertainment package offering other gaming activities such as horse racing and slot games in an attractive and exciting gaming environment. Moreover, for the first time, the bingo gaming industry in Ottawa will be able to leverage the long standing, successful experience of Rideau Carleton Raceway in gaming entertainment.



Attachment A: CRG Onsite Intercept Survey

RIDEAU CARLETON RACEWAY INTERCEPT SURVEY HIGHLIGHTS

- The majority of visitors interviewed were females (57.9%).
- The majority of visitors interviewed were over the age of 60 (48.2%).
- The majority of visitors were going to the RCR to play in the casino (76.4%).
- The majority of visitors to the RCR do not visit other Bingo Halls in the area (85.7%).
- The majority of visitors to the RCR do not play online Bingo (85.75%).
- The majority of visitors to the RCR have never heard of online Bingo (97.6%).
- While the majority of visitors to the RCR would not come to RCR to play bingo, a significant number (24.7%) would play bingo in combination with other on-site entertainment activities and another 16.4% would come just to play bingo.
- The majority of visitors to the RCR visit other gaming institutions (71.7%).
- The majority of visitors to the RCR know that Casino Lac Leamy has table card games (82.0%).
- The majority of visitors to the RCR believe that the Ontario Government should offer similar competitive programs (59.2%).
- The majority of visitors to the RCR know that a percentage of revenues from slots/bingo go to charities (80.1%).

THE FOLLOWING REPORTS THE RESULTS OF RCR INTERCEPT SURVEY CONDUCTED ON NOVEMBER 20-21, 2008. CRG CONSULTING INTERVIEWED 623 RANDOMLY SELECTED VISITORS TO THE RIDEAU CARLETON RACEWAY BETWEEN THE HOURS OF NOON TO 8PM. THE RESULTS ARE ACCURATE TO WITHIN ± 3.92 PERCENTAGE POINTS, 19 TIMES OUT OF 20.

Q1. What is your postal code?

Survey Respondents Spotting		
AREA	TOTAL	
	#	PERCENT
Within 5 km Radius	6	1.0
Within 10 km Radius	78	12.7
Within 30 km Radius	423	67.9
Outside 30 km Radius	125	20.1
Sub-total	548	88.0
Other (Refusal/Uncoded)	75	12.0

- Two-thirds of the visitors to the RCR (67.9%) live within a 30 km. radius of the Raceway/Casino



Q2. Why are you visiting the Rideau Carleton Raceway today?

Response	(n)	(%)
Play in the casino	476	76.4
To watch horse racing	52	8.4
To eat in the restaurants	48	7.7
Other events	47	7.5
TOTAL	623	100

- The vast majority of visitors to the RCR (76.4%) visited the RCR to play in the casino
- 20.7% of visitors indicated that they were visiting the RCR for more than one reason (i.e. primarily to play in the casino and/or eat in the restaurant)
- 50 visitors indicated that they were at the RCR to attend an event such as a luncheon and/or party gathering

Q3. How often do you visit the Rideau Carleton Raceway?

Response	(n)	(%)
Daily	36	5.8
At least once a week	288	43.0
2-3 times per month	122	19.6
Once every two months	121	19.4
Once a year	39	6.3
Rarely	20	3.2
First time	12	1.9
Other	5	0.8
TOTAL	623	100

- 43.0% of visitors to the Rideau Carleton Raceway can be characterized as **regular visitors** to the RCR, as they come at least once a week
- Almost 20% of visitors go to the Rideau Carleton Raceway at least 2-3 times per month

Q4/Q5. Do you visit/play Bingo in various Bingo Halls in the area? What are the names of the Bingo Halls?

Response	(n)	(%)
Yes	88	14.1
No	534	85.7
Refused	1	0.2
TOTAL	623	100

- 85.7% of visitors clearly indicated that they do not play Bingo at various Bingo Halls in the area
- Popular sites visited included Low, Kemptville, Lola, Merivale Road, slack Road and Carleton Place



Q6. How often do you visit the Bingo Halls?

Response	(n)	(%)
At least once a week	25	33.0
Once a month	22	27.3
2-3 times per month	7	8.0
Once every two months	13	15.9
Once a year	9	10.2
Rarely	5	5.7
TOTAL	88	100

- Only 88 visitors indicated that they visit Bingo Halls in the area. Of these, the majority (47) play at least once a month

Q7/Q8. Do you play Bingo online?

Response	(n)	(%)
Yes	14	2.2
No	608	97.6
Not sure/don't know	1	0.2
TOTAL	623	100

- An overwhelming number of visitors (97.6%) do not play Bingo online. Those who do play online Bingo play for an average of 2 hours

Q9. Have you ever heard of “Rapid Split the Pot Bingo?”

Response	(n)	(%)
Yes	32	5.1
No	591	94.9
TOTAL	623	100

- An overwhelming number of visitors (94.9%) have never heard of “Rapid Split the Pot Bingo”

Q10. If “Rapid Split the Pot Bingo” was offered at the Rideau Carleton Raceway, would you consider playing at the RCR?

Response	(n)	(%)
I would consider coming to the RCR/Casino just to play Bingo	102	16.4
I would consider coming to the RCR/Casino to play Bingo along with other activities	154	24.7
I would not consider coming to the RCR/Casino just to play Bingo	342	54.9
Unsure	25	4.0
TOTAL	623	100

- The majority of visitors (54.9%) would not come to the Rideau Carleton Raceway just to play “Rapid Split the Pot Bingo”



Q11/Q12. Do you also visit other gaming/casino establishments? What are some of the other gaming establishments that you visit?

Response	(n)	(%)
Yes	447	71.7
No	176	28.3
TOTAL	623	100

- Almost three-quarter of visitors (71.7%) visit other gaming establishments besides the Rideau Carleton Raceway
- Of the 447 visitors who said that they visit other gaming establishments, 92.0% visited Casino Lac Leamy; 42.5% visited 1000 Islands Casino Gananoque and 29.1% visited Akwasasne Mohawk Casino

Q13. How often would you say you visit other gaming establishments?

Response	(n)	(%)
Daily	7	1.5
At least once a week	46	10.2
2-3 times per month	73	16.2
Once every two months	122	27.0
Once a year	141	31.2
Rarely	62	13.7
Other	1	0.2
TOTAL	462	100

- 58.2% of visitors could be characterized as be “Infrequent Visitors” to other gaming establishments (i.e. visited once every two months and/or only once a year)

Q14. If card games with a dealer, like poker and blackjack, were offered at the Rideau Carleton Raceway, would you consider coming more frequently or would it make no difference to you?

Response	(n)	(%)
I would consider coming more frequently	176	29.7
It would make no difference to me	400	67.6
Unsure	16	2.7
TOTAL	592	100

- 67.6% of visitors said that they would not consider coming more frequently, even if there were card games, like poker and blackjack

Q15. Did you know that Casino Lac Leamy has table card games?

Response	(n)	(%)
Yes	511	82.0
No	112	18.0
TOTAL	623	100

- 82.0% of visitors know that Casino Lac Leamy offers table card games



Q16. Do you think the Ontario Government should offer similar competitive programs to RCR customers?

Response	(n)	(%)
Yes	369	59.2
No	254	40.8
TOTAL	623	100

- 59.2% of visitors believe that the Ontario Government should offer similar competitive programs
- 40.8% of visitors believe that the Ontario Government should not offer similar competitive programs

Q17. Do you know that a percentage of the revenues generated from the slots machines at casinos and Bingo operations go towards supporting registered charity organizations in the City of Ottawa?

Response	(n)	(%)
Yes	499	80.1
No	124	19.9
TOTAL	623	100

- 80.1% of visitors know that a percentage of revenues from slot machines and Bingo operations go towards supporting registered charity organizations in the City of Ottawa

Q18. What is your age?

Response	(n)	(%)
25-30	9	1.4
31-40	34	5.5
41-50	109	17.5
51-50	171	27.4
Over 60	300	48.2
TOTAL	623	100

- 48.2% of visitors were over the age of 60
- 27.4% of visitors were between 51-50



Attachment B: List of Charitable Organizations

- Operation GoHome
- Rideau Street Youth Enterprises
- St. Peter & Paul's Church
- Ottawa Firefighters Community Foundation
- Royal Canadian Legion (Barrhaven)
- Ottawa General Football Club
- Erin Society of Ottawa
- Barrhaven Scottish Rugby Club
- Ottawa Gaels Football Club
- St. Patrick Home
- Canada Day Arts Festival Inc.
- Victoria Day Festival
- Preston Street Community Foundation
- Italian Canadian Community Historical Society



Attachment C: Annual Bingo Hall Information – 2000 to 2007

Total Attendance - Players								
	2000	2001	2002	2003	2004	2005	2006	2007
Commercial Bingo Halls								
Overbrook	198,322	158,484	126,857	141,609	124,826	126,079	180,413	174,731
Bingoland	198,927	162,815	137,603	145,910	115,537	109,649	145,364	145,096
Friends	296,199	263,214	218,839	229,503	186,814	192,537	257,751	256,537
Convention–Merivale*	194,074	170,266	135,626	126,463	98,657	91,596	122,091	109,078
Club 90	197,631	170,263	98,531	--	--	--	--	--
Side Door	270,684	228,404	193,191	183,707	145,687	137,938	--	--
Rendez Vous	145,909	112,939	118,121	120,920	108,180	103,725	--	--
Hunt Club	164,442	147,989	39,996	--	--	--	--	--
Patro	24,909	20,155	18,989	18,458	15,739	13,844	--	--
Blackburn	141,132	128,062	81,417	60,376	--	--	--	--
Kanata	122,699	113,094	70,402	--	--	--	--	--
Total Commercial	1,954,928	1,675,676	1,239,572	1,026,946	795,440	775,368	705,619	685,442
Exempt Bingo Halls								
K. Columbus Vanier	8,493	8,328	7,954	8,095	7,451	7,869	9,280	7,836
Salle St Francois	--	14,686	14,088	13,819	11,521	11,796	15,349	14,387
Legion Greely	--	2,112	1,908	1,732	1,325	--	--	--
Total Exempt	8,493	25,126	23,950	23,646	20,297	19,665	24,629	22,223
TOTAL ALL	1,963,421	1,700,802	1,263,522	1,050,592	815,737	795,033	730,248	707,665

Note: * Convention changed to Merivale in 2005

Total Profit To Charities (Dollars)								
	2000	2001	2002	2003	2004	2005	2006	2007
Commercial Bingo Halls								
Overbrook	788,972	677,665	631,880	871,690	787,466	798,000	1,462,058	1,122,871
Bingoland	1,220,575	852,210	929,831	1,103,825	832,819	683,726	1,061,912	984,253
Friends	1,682,037	1,692,608	1,555,326	1,711,115	1,414,118	1,503,902	2,472,774	1,985,976
Convention-Merivale*	1,077,381	966,920	706,189	767,028	459,268	429,167	668,319	395,167
Club 90	871,266	681,840	290,506	--	--	--	--	--
Side Door	1,185,831	1,016,026	896,925	850,461	636,783	512,703	--	--
Rendez Vous	365,802	240,483	495,839	531,152	625,339	430,935	--	--
Hunt Club	718,661	504,352	152,045	--	--	--	--	--
Patro	110,895	38,959	38,743	35,229	27,407	24,215	--	--
Blackburn	349,494	315,689	211,919	164,559	--	--	--	--
Kanata	780,460	713,756	289,963	--	--	--	--	--
Total Commercial	9,151,379	7,700,515	6,199,163	6,035,063	4,783,205	4,382,651	5,665,965	4,488,269
Exempt Bingo Halls								
K. Columbus Vanier	14,126	31,318	34,958	30,946	39,651	39,685	52,163	55,416
Salle St Francois	--	97,529	93,385	87,736	69,994	77,750	152,608	132,256
Legion Greely	--	2,054	5,197	6,025	3,828	--	--	--
Total Exempt	14,126	130,901	133,541	124,709	113,474	117,435	204,771	187,672
TOTAL ALL	9,165,505	7,831,416	6,332,705	6,159,773	4,896,679	4,500,086	5,869,836	4,675,942

Note: * Convention changed to Merivale in 2005

Source: City of Ottawa