



CASINOS AND REGENERATION: THE STORY SO FAR

C4C BRIEFING NOTE

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On 30 January 2007 the Independent Casino Advisory Panel announced that the city of Manchester would host the UK's first supercasino.

The city came from behind to beat the frontrunners, Blackpool and Greenwich. This note deconstructs the decision, before critically assessing the relationship between casinos and regeneration more generally. It focuses on the regeneration issues around supercasino development. It concludes with some lessons for Manchester.

Key points:

- The 2005 Gambling Act modernises the UK's gambling laws. It provides new regulations for internet gambling, and allows for a new generation of big casinos across the UK: for one supercasino, eight large, and eight small casinos.
- Cities and central government are interested in the potential for 'casino-led urban regeneration'. This was a major factor in all of the supercasino bids.
- The evidence on casino-led urban regeneration is relatively thin. It is a new and relatively untested approach for the UK. The Manchester supercasino is effectively a pilot.
- Overall, big casinos appear to be a mixed blessing. Cities must guard against over-promising on what can be delivered, and be prepared for the potential downsides.
- Upsides include the potential for casinos to create jobs and to boost tourism and existing leisure sectors. There may also be image benefits for the city, and multiplier effects on the wider local economy.
- Downsides include increased problem gambling, mixed employment effects, displacement of existing businesses and spending, and damage to a city's image.
- There remains a real risk that the potential downsides might outweigh the upsides of the new supercasino.
- Manchester must be realistic about the potential costs and benefits of the supercasino, and quickly begin a clear forward strategy outlining how it will link local people to the new jobs, provide advice to local businesses, and take steps to limit gambling addiction. It should also push ahead with plans to take a cut of casino revenues – which can be recycled into the local economy.

1) Background: the Gambling Act

Legal gambling has existed in the UK for some time (see box 1). The 2005 Gambling Act significantly changes the rules. This section summarises the new legislation.

Box 1. A brief history of legal gambling in the UK

- 1961:** The 'Betting and Gaming Act' provides a legal basis for off-course betting and casinos
- 1968:** The 'Gaming Act' – restricted the hours casinos could open, limited the number of slot machines they could have, as well as limiting possible jackpots.
- 1970:** All gaming, including bingo and gaming machines, becomes subject to licence and is placed under the control of the Home Office.
- 2005:** The 'Gambling Act' is passed and will come into effect fully in September 2007. This Act relaxes gambling regulations significantly.

The Gambling Act comprehensively modernises the law on gambling. First, it introduces a powerful regulator for gambling – the Gambling Commission – which will assume the responsibilities of the Gaming Board in respect of casinos, bingo, gaming machines and lotteries. Second, the Act gives responsibility for the licensing of gambling premises to local authorities.

Third, gaming law now covers online gambling. Rather than outlaw online gambling, the Government has stated that the UK should seek to provide a global standard for good internet gambling regulation, protecting those who gamble online and establishing a strict social responsibility code of practice for UK based operators.

Finally, the Act allows for three new types of casinos to operate in Britain: the super casino (or regional casino), large casino and small casino. One supercasino will be permitted, along with eight large and eight small casinos.

The Government's stated objectives in initiating this new legislation are threefold:

- To prevent gambling from being a source of crime or disorder
- To ensure that gambling is conducted in a fair and open way
- To protect children and other vulnerable persons from being harmed or exploited by gambling (Gambling Act 2005).

Popular and policy attention focused on one element of the Act – the new casinos, and specifically, the supercasino. There are already 117 casinos across the country, but there are several reasons why the supercasino in particular merits our attention.

First, it will be huge, with a minimum total customer area of 5,000 m² - about the size of a football pitch. Second, it will be permitted to house up to 1,250 unlimited jackpot gaming machines. These machines are big revenue-makers for casinos, but also considered among the most addictive (Griffiths 2007). Third, the supercasino will also have hotels, conference facilities, restaurants, bars and areas for live entertainment. It will become a landmark feature of Manchester – and in other cities if more supercasinos are permitted in the future.

The other new casinos are a great deal smaller, but still significant. Large casinos will have a minimum total customer area of 1,500 m², while small casinos will have a

minimum total customer area of 750m², and be permitted up to 80 Category B gaming machines, with a maximum jackpot of £4,000.

The one regional and eight large casinos will be permitted to offer bingo, and all three categories will be permitted to offer betting.

2) Implementing the Act: the Casino Advisory Panel

The Government set up an independent Casino Advisory Panel (CAP) to decide the locations of the 17 new casinos across the UK.

The Panel was led by Professor Stephen Crow, who was appointed by the Secretary of State following an open competition. Professor Crow is an eminent practitioner of Statutory Planning, having held one of its highest offices in Britain as Chief Planning Inspector (1988-1994) and Chief Executive (1992-1994) at the Planning Inspectorate.

The other members of the panel were Christopher Collison, James Froomberg, Neil Mundy and Deep Sagar. There was a theme of regeneration and planning experience among board members.

The Panel reported back to Ministers on 30 January. The government now needs to gain Parliamentary approval to grant licenses for the host cities. Cities will then invite bids from operators and developers to build and run the casinos.

3) The supercasino

The most prominent – and controversial – element of the Government's approach is the creation of a supercasino. Originally, eight of these were planned, but in the face of widespread protest the Government decided to go ahead with just one.

The cities that applied for supercasino licenses but were knocked out were Leeds, Southampton, Chesterfield, Coventry, Dartford, Dudley, Great Yarmouth, Havering, Hull, Ipswich, Middlesbrough, Midlothian, Newport, Solihull (NEC Site), Southend-on-Sea, Sunderland, Thurrock, Wakefield, West Dunbartonshire.

A shortlist of eight was decided. Brent dropped out after this, leaving seven runners:

- Greenwich / Millennium Dome
- Cardiff
- Blackpool
- Glasgow
- Manchester
- Newcastle
- Sheffield.

The CAP stated that to be successful any bid must fulfil the following criteria:

- consider the social impact of the new supercasino
- have a need for urban regeneration
- possess a genuine willingness to license
- guarantee a high probability of implementation
- boast broad regional support
- target specific community benefits
- offer a suitable number and range of potential sites for the casino.

Importantly, the supercasino must address a need for regeneration in the chosen area, and the winning city must take into account the new casino's social impact and ensure that it is not harmful. This meant that the winning area was likely to have high levels of unemployment and social deprivation, and the CAP was concerned that people living close to some of the proposed sites may have a high vulnerability to gambling addiction.

4) The decision: winners and losers

In September 2006 the CAP released its initial scoring of bids for the supercasino. Top scorers were Greenwich, Glasgow and Blackpool. Greenwich ranked number one when the initial shortlist of seven was drawn up, a full ten points ahead of the eventual winner – Manchester.

In the months that followed, Blackpool and Greenwich came to be considered the two frontrunners for the supercasino. Blackpool bolstered its case with a nationwide poll, suggesting it was the popular choice – even among Londoners.¹

So it was to widespread surprise that on 30 January 2007 the Independent Casino Advisory Panel announced that Manchester would host the UK's first supercasino.

Manchester

The Manchester bid contended that the casino development would attract 1.3m new visitors to the city and create a total of over 1,000 net new jobs for the city of Manchester (CPC 2006).

The bid focussed on the city's proven track record of delivering successful regeneration programmes. It stressed the significant experience of Manchester City Council through several major urban renewal and social development projects over the past two decades (Manchester City Council 2006). With extensive delivery experience, the city argued that they were the best placed to strike a productive relationship with the casino operator, to ensure benefits from the supercasino reach hard to help communities – and to protect the vulnerable from problem gambling.

The Panel was impressed with Manchester's bid in every respect. It commented that it represented the most "complete package" of any bid:

- The Council's consultations with other local authorities and relevant bodies proved that it was a good location to test the social impact of the supercasino
- Manchester has a catchment area "second only to London"
- Manchester has the greatest regeneration need in terms of multiple deprivation
- Manchester, as one of England's eight "core cities" and as one of the cities in the Northern Way, has a pivotal role in the regeneration of northern England (CAP 2007).

Blackpool

The Blackpool bid emphasised the near-terminal decline of Blackpool as a tourist resort. Local leaders argued that the large number of jobs that the casino would create, and the accompanying boost to tourism, would mean that the economic

¹ When respondents were asked to choose from the shortlist. In a prior 'free choice' question, a majority of respondents chose London. Significantly, Manchester was not a popular choice in either case (Populus 2006).

benefits would reach the poorest sections of the city. Specifically, Blackpool City Council argued that the project would create 2000 jobs and generate £2bn of investment and save a town that no-one has wanted to invest in “for decades” (Ward 2006).

While accepting that Blackpool was in need of regeneration, the Panel was unconvinced that a supercasino was the best way forward for the city:

- The regeneration benefits of the supercasino for Blackpool are unproven and more limited geographically than other proposals
- A regional casino on its own would be unlikely to effect the transformation sought locally, nor optimise the wider regeneration through regional and national economic growth
- It would not “represent the best test of social impact for the regional casino” since “most of the social effects would be exported” (CAP 2007).

Greenwich

The Greenwich bid focused on the 120,000 additional homes that are due to be built in the area by 2016, and on the need to provide employment opportunities for the existing and new communities. It cited the fact that Greenwich, and the neighbouring Boroughs of Tower Hamlets, Newham, Hackney and Waltham Forest, have some of the worst unemployment rates in the UK. It also held that Greenwich offers a strategically significant and dynamic location for a regional casino, with an unrivalled catchment area and testing bed for social impact (Greenwich Borough Council 2006).

The Panel did not find the Greenwich bid for the casino compelling, despite recognising that the area was in need of social and economic regeneration and that local people would likely benefit from the jobs created by the supercasino (CAP 2007):

- The proposal suffered from “uncertain additionality” as regards regeneration benefits in general
- The proposal was “unconvincing” in offering the best location in which to test the social impact of a supercasino.

Cardiff

The Cardiff bid stressed that the supercasino would ensure the delivery of a significant package of community benefits, including 1,500 new jobs, to an area in need of regeneration. The Council also stressed its proven track record of providing advice and training to the economically inactive and long-term unemployed to assist them back into the labour market (Cardiff City Council 2006).

However, the Panel was not convinced that Cardiff had the strongest regeneration need of all competing cities. It noted in particular that “too much of any regeneration benefits would be “concentrated around the International Sports Village” (CAP 2007).

Glasgow

Glasgow’s bid argued that the supercasino would be a key catalyst to delivering major regeneration in neighbourhoods along the River Clyde corridor – one of the key priority regeneration areas identified both locally, regionally and nationally (Glasgow City Council 2006).

However, the Panel did not believe that the supercasino would do as much to alleviate regeneration needs as it might in the other short-listed cities. It also detected a lack of wider enthusiasm for the supercasino compared to other competing cities (CAP 2007).

Newcastle

Newcastle's bid focussed on the benefits that the regional convention centre, due to accompany the supercasino, would bring to the city. It also stressed that the supercasino would bring a welcome amount of new jobs to the area (Newcastle City Council 2006).

While the Panel believed Newcastle's to be a "sound proposal", it commented that "the likely regeneration benefits that the proposal would bring are not as strong as elsewhere" (CAP 2007).

Sheffield

The Sheffield bid focussed on the large number of jobs the supercasino would stand to create in the region: 1500 short term jobs, with up to 14,000 jobs over 20 years. Chief Executive Sir Bob Kerslake told the Panel that the casino would generate £217m in extra economic activity in the same period (BBC Online 2006b).

However, the Panel was not convinced that Sheffield as a whole was in most need of regeneration. Equally, the Panel was not convinced that Sheffield's "location, catchment and accessibility" would optimise the potential regeneration benefits as well as some of the other competing cities (CAP 2007).

5) What happens next?

Having received the Panel's report, Culture Secretary Tessa Jowell will now outline the areas where the 17 new casinos are to be constructed in a Parliamentary order. These recommendations will then be voted on by MPs. Assuming they receive Parliamentary approval, the cities nominated to host super, large and small casinos by the Panel will then be free to tender for licenses.

Observers believe that following a three- to six-month tender process, a planning application could be submitted by mid-2008. Depending upon whether there are any subsequent legal challenges or public inquiries, the development in Manchester could be open for business by 2011 (Quinn 2007).

6) Casinos and regeneration: the evidence

Why would British cities want a big new casino? All the cities competing for the supercasino made a link between the new development and urban regeneration. Most suggested a supercasino would have positive impacts on:

- Job creation
- Employment opportunities for workless people
- New infrastructure – such as hotels and conference centres
- Growth of the tourism and leisure sectors
- Image benefits – leading to further interest and investment in the city.

In other words, Manchester and its six rivals wanted to pursue a *casino-led regeneration* strategy. The other 16 cities awarded smaller casinos will also be looking for similar benefits.

What is the evidence for this? Overall, it's less than ideal. There are relatively few studies of the economic and social impacts of gambling, particularly large casinos. Other countries, from the US to New Zealand and Australia have casinos, but their overall impact on urban regeneration is unclear. Methodologies differ across studies, and many are disputed. And both social attitudes to gambling and consumer behaviour will vary from place to place.

All of this makes it difficult to predict with certainty what large-scale casino-led regeneration will achieve in the UK. It is a new and relatively untested approach.

However, with these caveats in mind, we can draw out some headline lessons about the regeneration impacts of supercasinos. Overall, they seem to be a mixed blessing (see box 2). Done right, supercasinos can provide a positive regeneration boost. The main risk is that the social costs outweigh the economic benefits.

Box 2. Casino-led regeneration: possible upsides and downsides.

Upsides

- Net new job creation
- Growth in tourism and leisure sectors, driven by increased visitor numbers and additional infrastructure
- Image benefits – which may further increase visitor numbers, and can lead to additional investment
- Multiplier effects on the wider local economy.

Downsides

- Displacement of existing spending, and impacts on existing businesses
- Jobs being taken by those already in work, or migrants
- Likely increases in problem gambling, antisocial behaviour and criminality
- Damage to city image.

Economic impacts

The economic impacts of the supercasino are likely to be mixed, but generally positive. The Casino Advisory Panel's own review of the evidence suggests that while there are "positive economic and social effects" that casinos could bring, "the community, as well as the local authority, should be forewarned that the economic growth might not necessarily bring about tangible economic benefits to the host area" (CAP 2006).

The economic benefits are mainly around new jobs and tourism / leisure sector growth, additional infrastructure, image benefits and multiplier effects on the local economy. Independent estimates suggest Manchester's supercasino should deliver at least 3,400 gross jobs to the local authority area (CPC 2006).

Tourism and Leisure

Casino developments can help develop 'tourist hubs' in cities (Chia 2006, referenced in CAP 2006). A rise in visitor numbers will also have catalyst effects on the wider

local economy (CAP 2006). In Manchester's case, the supercasino could improve the city's leisure offer. By drawing in extra visitors, the supercasino might provide a boost to the wider local economy – hotels, bars, restaurants, shops and so on. Research commissioned by the Council estimates the gross value added benefit of a new casino at Sportcity to be £94m per annum. This represents a 10 per cent upturn in the city's tourism and leisure economy (CPC 2006).

If we look to Las Vegas, we can see that casino complexes can generate not only casino jobs, but also have the potential to create additional jobs and investments throughout the community. These are most likely to relate to other functions of a destination resort, such as hotels, restaurants, casino supply firms, outdoor recreation and retail shopping (Eadington, referenced in CAP 2006).

Property Prices

Moreover, the supercasino could have a positive impact on property prices in the surrounding area. Property professionals have estimated a 20-30 per cent increase in land values and house prices in East Manchester by the time the casino eventually opens, and developers have already hinted at a surge in demand (Quinn 2007).

Done well, casino-led regeneration can help re-brand and reposition a city long term. Atlantic City is another good example (box 3).

Box 3. Atlantic City, USA

Atlantic City is a well-known example of casino-led urban regeneration. In the 1930s and 40s Atlantic City was a popular coastal holiday resort. But by the 1970s it faced declining tourist numbers, low employment and crumbling infrastructure. Gambling was placed at the heart of the recovery plans for Atlantic City. By focussing on the creation of casinos, it was hoped tourists, developers and investors would be attracted to the area. The casino industry in Atlantic City now employs around 45,000 people, and welcomes 34 million visitors a year. Over the last thirty years casinos have invested over \$12bn in Atlantic City.

Atlantic City recycles some casino revenue back into the local economy. In 2006, casinos paid \$417.5 million in taxes into the Casino Revenue Fund, which supports programmes for the state's senior citizens and people with disabilities. Casinos also incurred \$65.2m in reinvestment obligations last year, to be put into projects approved by the Casino Reinvestment Development Authority (Casino Control Commission 2006).

However, the casino industry may have diverted trade and investment away from smaller competitor businesses. Evidence suggests that Atlantic City's retail sector has continued to decline – despite the growth in casinos (Government Accountability Office 2000a, referenced in CAP 2006).

But the economic impacts are not always positive. Market size is critical. If less than half a casino's customers are derived from outside a given city, the overall impact is likely to be 'redistributive rather than expansionary' – in other words, diverting existing spending rather than bringing new money in (Rephann referenced in CAP 2006). This appears to have been a key factor in the CAP's decision to favour Manchester, which "has a catchment area for a casino second only to London". By contrast, a Blackpool casino would be unlikely to have the same pull (CAP 2007).

Manchester and other UK winning cities are also unlikely to be able to levy local taxes. None of the tax benefits are to be directly re-invested in the city, and will instead be collected and distributed by the Treasury. This is unlike examples in the US, such as Atlantic City and Detroit, where a proportion of the tax revenues from its casinos is collected and reinvested at a city level. However, Manchester is reportedly developing a scheme to share revenues with the casino operator (see below).

Displacement

Displacement – of consumer spending and existing employment – is another key issue. An independent study suggested that in Blackpool between 1,208–1,531 net jobs would be created (NERA 2006b). This is less than the 2,000-odd claimed by the Council. (Ward 2006) Manchester's bid suggested that at least 1,100 net additional jobs would be created, once displacement effects were taken into account – compared with 3,400 gross casino-related positions (CPC 2006).

Moreover, there are question marks over the future of the six other licensed casinos within the boundary of Manchester local authority, with the unveiling of the supercasino likely to pull customers away from those establishments. This is being referred to by some as the "Trafford Centre effect"; a reference to what happened to Manchester city centre when Peel Holdings' out-of-town retail centre opened in 1998. (Quinn 2007).

As for spending, a small-scale study of the Glasgow supercasino bid suggested that:

- £96.75 million (2% of Scottish total) of tourist spending would be diverted from other forms of spending, either in Glasgow or elsewhere in Scotland, with only £36.5 million being new spend in Glasgow from tourists
- A further £68.8 million would be spent by Scottish residents, again displaced from other forms of expenditure
- Only £1.3 million of the new spend would come from Glasgow residents (Hall-Aitken 2006b).

Despite the potential for tourism gains outlined earlier, evidence from New Zealand and Australia which both boast a number of casinos, implies that the hopes of increased tourism may be overestimated. A 1998 survey by the Australian Institute for Gambling Research found that 86 per cent of Auckland casino patrons were New Zealand residents. The survey also found that less than 20 per cent of overseas visitors actually went to a casino (Statistics New Zealand 1999). In 1997-98, overseas players alone accounted for just 25 per cent of total expenditure on casino gaming in Australia (Australian Bureau of Statistics 1999, referenced in CAP 2006).

Linking local people to jobs in the supercasino

A final regeneration issue is linking local people to the new casino positions. For local regeneration agencies, there is a clear risk that many of these jobs – entry and intermediate level – will be taken by migrants or those already in work. Equally, a study of Blackpool's bid notes that the kind of jobs created by the supercasino will not be particularly suited to the needs of local residents (re-) entering the labour market (Hall-Aitken 2006a). The Panel was particularly wary of this, stating in their research document that "continuous training and counselling" is needed to ensure that locals are "well fitted into the jobs" and "structural unemployment is avoided." It cites Atlantic City as being particularly effective in this regard (CAP 2006). Given their experience in welfare to work programmes, it seems the Panel was most convinced by Manchester's ability to link local people with any new jobs.

Social impacts

Economic impacts of a supercasino are mixed, but are generally positive. Social impacts appear to be generally negative. The CAP's research warns that casino development could bring "significant distress to the host economy and community if there are no efficient measures to contain the negative impacts casino developments could bring to the host area" (CAP 2006).

These include increased levels of gambling addiction amongst vulnerable groups such as minors and those in poverty and increased crime rates in the surrounding area. People with "limited opportunities for increases in wealth require greater protection from gambling as they are more vulnerable to becoming problem and pathological gamblers in society" (CAP 2006).

Both of these factors could have detrimental effects on the local economy, impacting negatively on the poorest wards of the selected city, and deterring future investment in other sectors.

7) Lessons for Manchester

Having been awarded the supercasino, the real work for Manchester City Council is about to begin. Big casinos are likely to deliver mixed blessings. Question marks remain over the net number of jobs the supercasino will create, and problem gambling is likely to increase. The risk – as suggested by some studies – is the economic benefits are outweighed by the social negatives (Hall-Aitken 2006a, Hall-Aitken 2006b, NERA 2006a, NERA 2006b).

Manchester must be realistic about the potential costs and benefits of the supercasino, and quickly begin a clear forward strategy outlining how it will link local people to the new jobs, provide advice to local businesses, and take steps to limit gambling addiction.

We recommend that Manchester takes the following steps in order to maximise the regeneration benefits of the supercasino:

- **Produce a clear plan** – showing how the casino will help the local economy by producing rigorous predictions of new jobs, the potential impact on unemployment and how any increases in problem gambling could be dealt with
- **Link local people to casino jobs** – building on the city's existing training and employment capacity, such as the Stepping Stones Into Work project and the new City Strategy pathfinder
- **Tackle gambling addiction** – work with community groups, charities and social services to minimise risks of increased problem gambling
- **Help local business** – provide advice to local businesses to help them benefit from the casino
- **Ask the operator to share the costs** – consider a local levy on casino operator profits to cover potential social costs such as policing and problem gambling, and to recycle money into the local economy. Manchester is reportedly planning a revenue-sharing scheme with the casino operator, in return for allowing

development. It is also likely to retain freehold of any land used (Wilson and Blitz 2007).

If these steps are implemented effectively, the Manchester supercasino could be a success, and deliver a real regeneration boost to the city. The Centre for Cities will be watching with interest over the coming months, as Manchester and the other winning cities try to transform the promise of casino-led urban regeneration into a reality.

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