

# The Economic & Social Impacts of the Plainridge Park Casino on Plainville and Surrounding Communities (Attleboro, Foxborough, Mansfield, North Attleborough, and Wrentham) July 2015-June 2017

Steve Crosby, Chair  
Massachusetts Gaming Commission  
June 26, 2018

# Legislative Mandate

- Expanded Gaming Act requires MGC to establish an “annual research agenda” to assist in understanding the social and economic effects of casino gambling in MA
- Social & Economic Impacts of Gambling in Massachusetts (SEIGMA) and the Massachusetts Gambling Impact Cohort (MAGIC) conducted by the University of Massachusetts Amherst are the investigations directed at understanding these impacts

# Plainridge Park Casino (PPC)

Venue	Host Community	Surrounding Communities	Opening Date	Current Gambling Availability	Notes
Slot Parlor	Plainville	Attleboro Foxborough Mansfield North Attleborough Wrentham	June 24, 2015	<ul style="list-style-type: none"> <li>• 1,249 slots + electronic table games</li> <li>• live harness racing track + simulcast betting</li> <li>• several instant ticket and lottery ticket terminals</li> </ul>	<ul style="list-style-type: none"> <li>• Harness racing since 1999</li> <li>• Casino expansion cost \$150.2M</li> <li>• 196,000 sq ft for casino operations</li> <li>• several restaurants &amp; bars</li> <li>• Owned by Penn National</li> </ul>



# SEIGMA Methodological Principles

- Identify how much money is involved, where it is coming from, and where it is going
- Assess impacts for years before and for years after the introduction of new gambling venues
- Comprehensively assess all potential economic and social impacts and utilize multiple sources of info for triangulation
- Compare changes to those observed in Matched Control Communities

Focus on Plainridge Park Casino

# **SOCIAL IMPACTS**

<b>PROBLEM GAMBLING (PG) AND RELATED INDICES</b>	<b>Prevalence and Incidence</b>
	<b>Treatment Seeking</b>
	<b>Personal Bankruptcy</b>
	<b>Divorce, Separation, Domestic Violence, Child Abuse/Neglect</b>
	<b>Suicide</b>
<b>CRIME</b>	<b>Overall Crime Rates</b>
	<b>Illegal Gambling</b>
<b>ATTITUDES</b>	<b>Attitudes toward Gambling</b>
<b>POPULATION HEALTH</b>	<b>Physical and Psychological Health</b>
	<b>Substance Use and Addictions</b>
	<b>Leisure Activity</b>
<b>DEMOGRAPHICS</b>	<b>Demographic Changes</b>
<b>ENVIRONMENT</b>	<b>Traffic (Volume, Accidents)</b>
	<b>Noise</b>

# Problem Gambling & Related Indices

- NO SIGNIFICANT CHANGES IN PROBLEM GAMBLING OR RELATED INDICES HAVE LIKELY OCCURRED IN THE PLAINRIDGE PARK H&SC SUBSEQUENT TO THE OPENING OF PPC.

# Problem Gambling & Related Indices

- No significant change in PG or At Risk Gambling in Baseline Targeted Population Survey (BTPS) of Plainville in 2014 to Follow-Up (FTPS) in 2016.

Gambling Category	BTPS-Plainville 2014		FTPS-Plainville 2016	
	<i>N</i>	%	<i>N</i>	%
Non-Gambler	58,236	19.8	57,015	19.3
Recreational Gambler	208,689	70.9	209,077	70.8
At-Risk Gambler	19,631	6.7	24,116	8.2
Problem Gambler	7,586	2.6	5,276	1.8



# Problem Gambling & Related Indices

- No significant change from BTPS-Plainville to FTPS-Plainville in % of PG wanting help or seeking help.

	2014		2016	
PG Wanting Help	0/16	0%	0/12	0%
PG Seeking Help	0/16	0%	0/12	0%

# Problem Gambling & Related Indices

- No significant change from BTPS-Plainville to FTPS-Plainville in % of regular gamblers reporting negative impacts due to gambling.

	2014		2016	
Financial Problems	8/471	1.7%	6/416	1.4%
Filing for Bankruptcy	0/471	0%	0/416	0%
Relationship Problems	3/463	.6%	4/413	1.0%
Divorced/Separated	0/463	0%	0/413	0%
Domestic Violence	0/463	0%	0/412	0%
Child/Family Neglect	0/466	0%	0/413	0%
Child Welfare Involvement	0/466	0%	0/413	0%
Health Problems	11/468	2.3%	11/412	2.7%
Significant Mental Stress	19/463	4.1%	9/418	2.2%
Suicidal Ideation	3/465	.6%	2/418	.5%

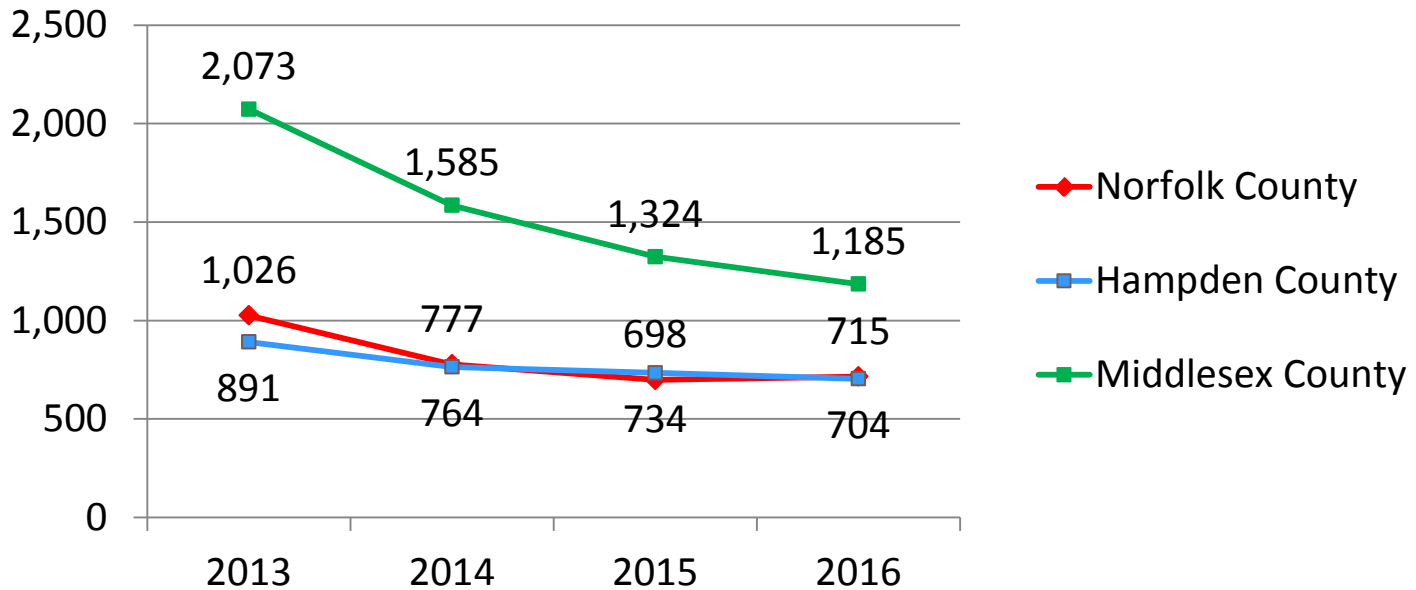
# Problem Gambling & Related Indices

- No reported change in number of Gamblers Anonymous meetings in Plainville area or number of people attending meetings.

*“We have had GA meetings here [Plainville United Methodist Church] for approximately 20 years. At present about 15 people attend these meetings each week. We have not seen any increase in attendance since Plainridge [Casino] opened.”  
(Secretary for NE Gamblers Anonymous, Mar 7, 2018).*

# Problem Gambling & Related Indices

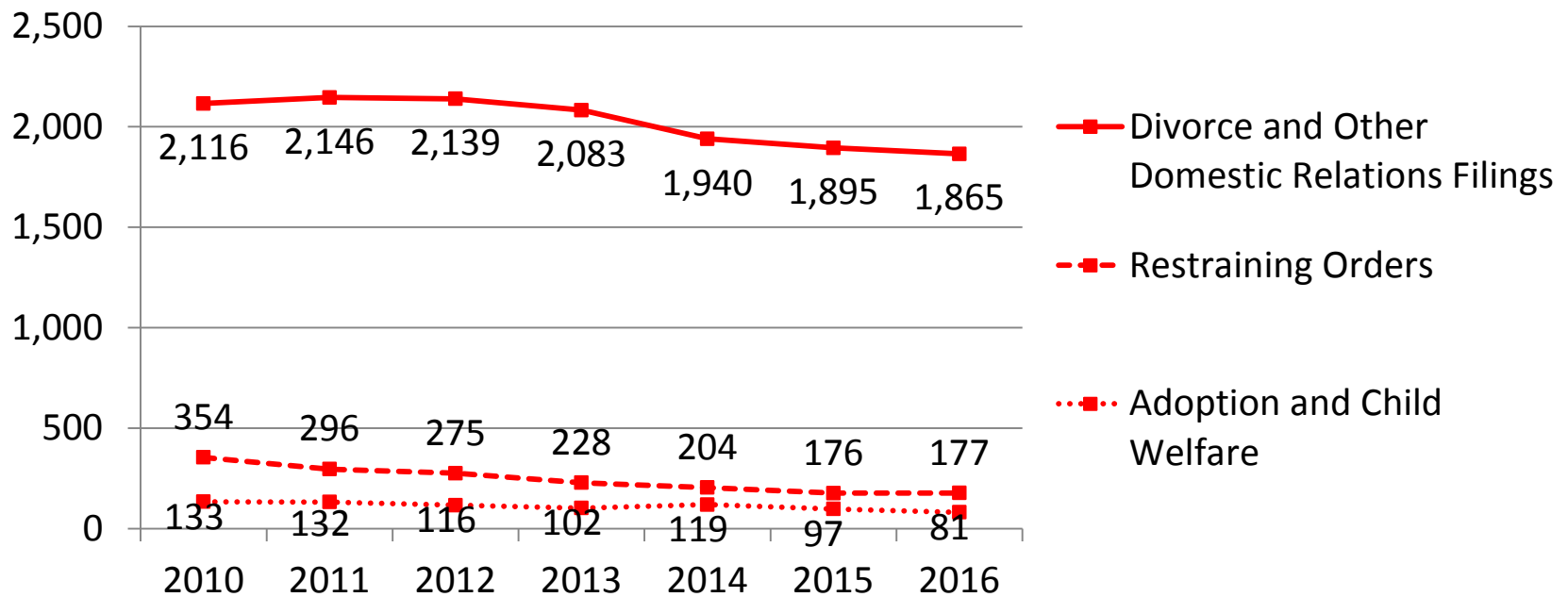
- No change in personal bankruptcy filings in Norfolk County, where Plainville is situated.



Source: U.S. Bankruptcy Courts

# Problem Gambling & Related Indices

- No changes in divorce filings, restraining orders, and cases of child welfare involvement in Norfolk County.



Source: MA Courts (2018)

# Problem Gambling & Related Indices

- Plainville Key Informants report no obvious impacts.

*“I don’t really see any impact on the health and well-being of the people of Plainville. Conditions now seem to be as they were prior to the opening of the casino.”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**

*“...residents have not come to us with concerns that there has been an increase in problem gambling.”* **Jennifer Thompson, Town Administrator, Plainville, MA, Jan 25, 2018.**

# Crime

- PPC HAS NOT SIGNIFICANTLY INCREASED OVERALL CRIME IN PPC H&SC, BUT THERE WAS AN INCREASE (TEMPORARY) IN CREDIT CARD FRAUD AND REPORTS OF LOST PROPERTY AND SUSPICIOUS ACTIVITY IN PLAINVILLE LIKELY ATTRIBUTABLE TO PPC.

# Crime

- Plainville police statistics show increase in property crime, total crime, and calls for service at PPC in 2 years after it became a casino compared to prior 2 years.

	2-Years Prior to June 2015 at Plainridge Racecourse	June 2015 – July 2017 at Plainridge Park Casino
Total Crime Offenses	10	90
Property Crime Offenses	6	47
Violent Crime Offenses	0	0
Calls for Service	1,130	1,566

Source: Bruce (2018)



# Crime

- However, increased crime at PPC has not produced increased crime in Plainville from 2010-2015 vs 2016-2017 (these numbers inclusive of PPC crimes).

	<b>2010 – 2015 Annual Average</b>	<b>2016 – 2017 Annual Average</b>	<b>% Change</b>
Total Crime Offenses	301.8	285.5	5.4% decrease
Property Crimes	208.6	187.5	10.1% decrease
Violent Crimes	29.6	37.5	26.7% increase

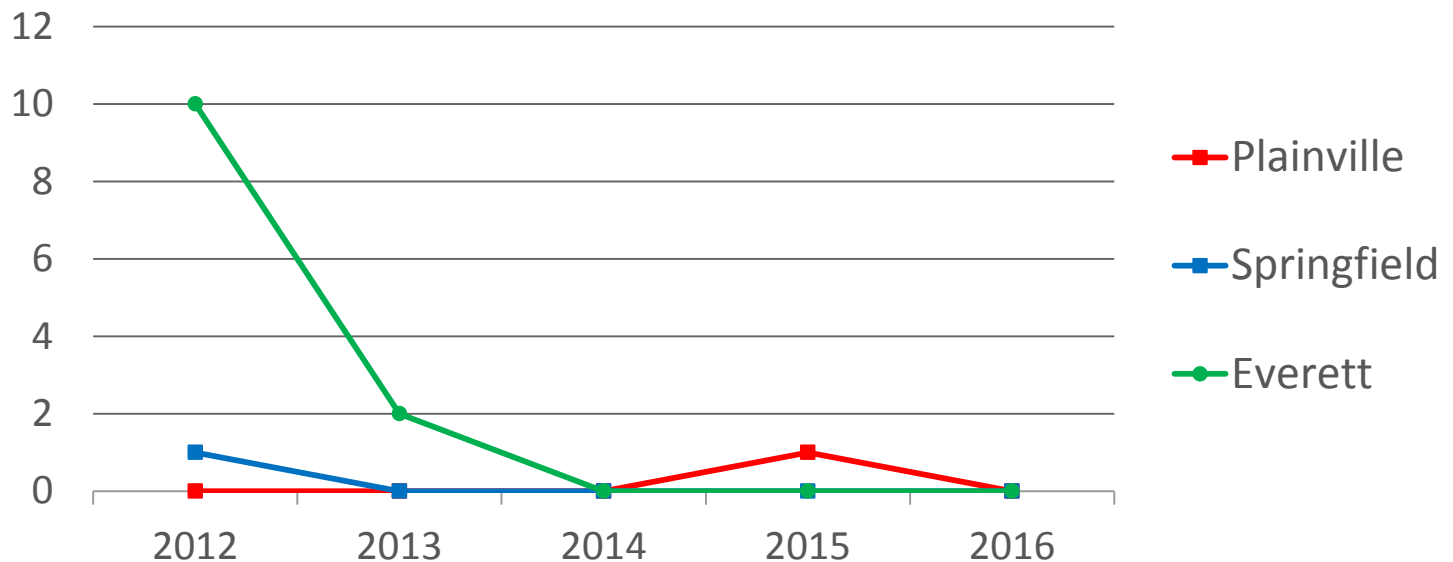
Source: Bruce (2018)

# Crime

- That being said, 7/46 individual types of crime and calls for service in Plainville did significantly increase from 2010-2015 to 2016-2017, whereas 1/46 significantly decreased (Bruce, 2018).
- Examination of the original written police reports suggests that credit card fraud, lost property reports, and reports of suspicious activity are only incidents likely attributable to PPC (Bruce, 2018)

# Crime

- No significant change in number of illegal gambling offenses in Plainville.



Source: Uniform Crime Reporting Statistics (FBI, 2018)

# Crime

- Collective police force statistics for PPC H&SC show a significant *decrease* in property and total crimes from 2010-2015 to 2016-2017, but small increase in violent crimes.

	2010 – 2015 Annual Average	2016 – 2017 Annual Average	% Change
Total Crime Offenses	8,305.40	7,103.50	14.5% decrease
Property Crimes	3,904.60	3,466.00	11.2% decrease
Violent Crimes	870.4	943	8.3% increase

Source: Bruce (2018)

# Crime

- However, 6/46 individual types of crime and calls for service in the PPC H&SC did significantly increase and 2/46 significantly decreased (Bruce, 2018).
- Examination of original written police reports as well as comparisons with control communities suggests that credit card fraud is only activity likely attributable to PPC (Bruce, 2018).

# Crime

- No significant change from BTPS-Plainville to FTPS-Plainville in % of regular gamblers who report their gambling has caused them to commit an illegal act or be arrested.

	2014		2016	
Illegal act	0/463	0%	2/410	.5%
Arrested	0/463	0%	0/410	0%

# Attitudes

- THERE IS EVIDENCE OF A SIGNIFICANT CHANGE OF ATTITUDES TOWARD GAMBLING IN THE PPC H&SC.
  - Decrease in % of people who think gambling is not available enough (27% - 12%) and increase in % who believe current availability is fine (61% - 74%)
  - Decrease in % of people who think that casinos beneficial to MA (44% - 33%) and increase in % who believe they are neither beneficial or harmful (22% - 32%)

# Attitudes

- Plainville Key Informants report positive attitudes toward PPC.

*“Overwhelmingly, the people in Plainville are happy the casino is here”.*  
**Jennifer Thompson, Town Administrator, Plainville, MA, Jan 25, 2018.**

*“I would have to say that everyone I have come across is pleased with the casino to this point. It has come through with all of the promises that were made”.* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**



# Population Health

- THERE IS NO EVIDENCE OF ANY CHANGE IN POPULATION HEALTH.

# Population Health

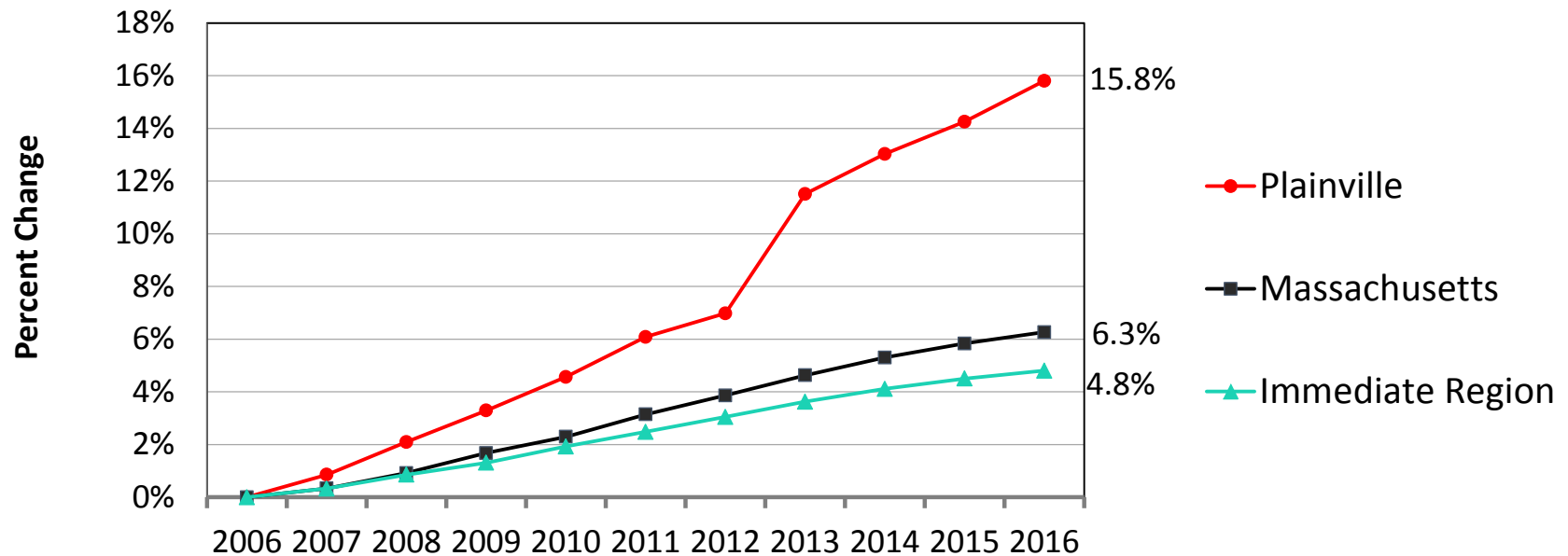
- No significant change from BTPS-Plainville to FTPS-Plainville in health, happiness or stress.
- No significant change from BTPS-Plainville to FTPS-Plainville in % of people who reported seeking help for their use of alcohol or drugs or who reported having a behavioral addiction.
- No significant change from BTPS-Plainville to FTPS-Plainville in rated ‘importance of gambling as a recreational activity’.

# Demographics

- THERE IS VERY LITTLE REASON TO ANTICIPATE CHANGES IN POPULATION OR DEMOGRAPHIC CHARACTERISTICS IN THE PPC H&SC AND NO CHANGES ATTRIBUTABLE TO PPC WERE OBSERVED.

# Demographics

- Plainville's population has increased faster than in other areas of the state, but this trend was evident for several years prior to PPC.



Source: U.S. Census

# Demographics

- The PPC Employee Survey found that only 75 employees of PPC reported moving to take their job, with only 13 of these individuals moving to Plainville.

# Demographics

- Plainville Key Informants report no school impacts:

*“We haven’t seen an influx in the school system. So they [school system] have not received any direct impact from the casino.”*

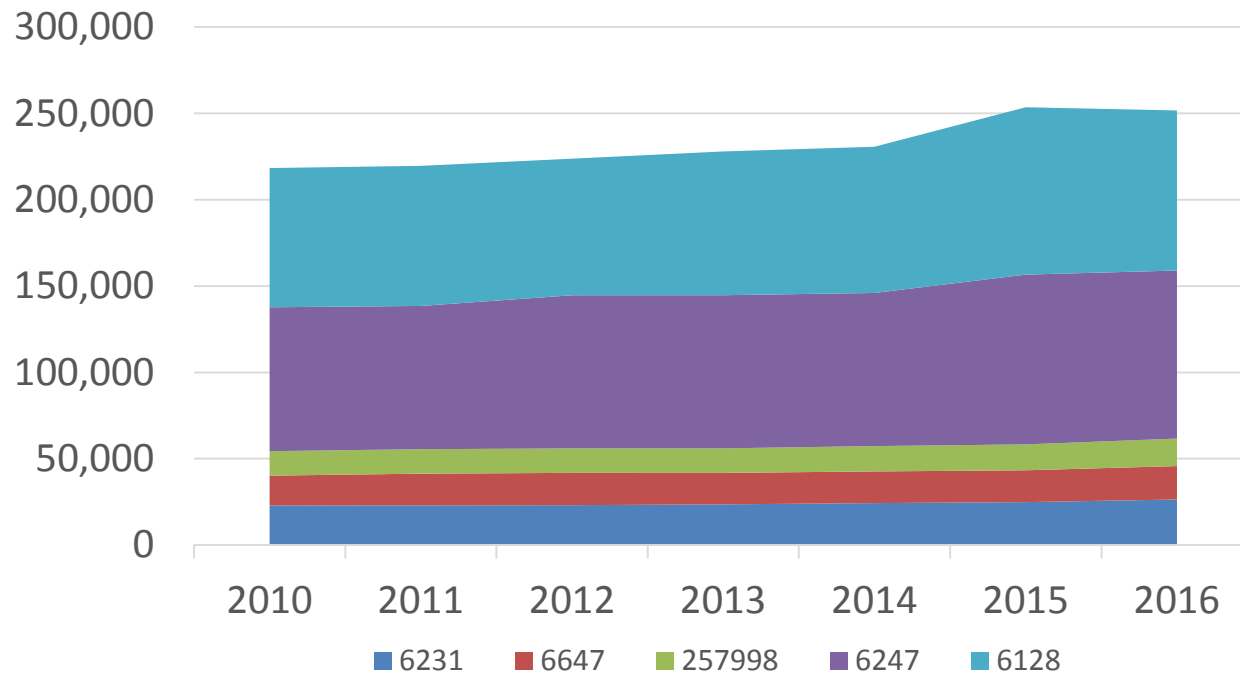
***Lou LeBlanc, Chairman of the Board of Health, Plainville, MA,  
Mar 1, 2018.***

# Environment

- THERE IS EVIDENCE OF SOME ENVIRONMENTAL IMPACTS
  - There were noise complaints in Plainville associated with PPC construction, but not its operation.
  - Plainville has experienced an increase in traffic volume.
  - Plainville has experienced an increased in traffic complaints.

# Environment

- Traffic volume in Plainville increased 9% from 2014 to 2016. [PPC construction began Apr 2014 and casino opened Jun 2015].



Source: MA Department of Transportation (MassDOT)



# Environment

- Traffic complaints have significantly increased in Plainville, and to a lesser extent in PPC H&SC.

	2010 – 2015 Average	2016 – 2017 Average	% Change
<b>Plainville</b>			
Traffic Collision	312.0	329.0	5.4% increase
Traffic Complaint	234.8	329.5	40.3% increase
<b>Plainridge Park H&amp;SC</b>			
Traffic Collision	4,583.2	4,975.0	8.5% increase
Traffic Complaint	1,692.4	1,946.5	15.0% increase

Source: Bruce (2018)

# Environment

- Traffic fatalities in Norfolk County have increased slightly, coincident with the beginning of construction (shaded).

County	Year	Traffic Fatalities
Norfolk County (Plainville)	2013	28
	2014	41
	2015	38
	2016	33

Source: Fatality Analysis Reporting System & National Highway Safety Administration

# Environment

- However, a) attribution to the casino is weak, because traffic fatalities are for the entire county; b) traffic fatalities have also increased in the state:

Year	MA Traffic Fatalities
2013	351
2014	354
2015	306
2016	389

Source: Fatality Analysis Reporting System & National Highway Safety Administration

# Environment

## ➤ Plainville Key Informants:

*“During construction the Board of Health received some complaints about the construction activity. There were dust complaints and there were noise complaints. We went out there with noise meters and took ambient noise levels and everything was found to be within tolerance and specs for a construction site. There were no violations issued.....We have received no noise complaints since construction has been completed.”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**

# Environment

## ➤ Plainville Key Informants:

*“We have had virtually no issues in terms of traffic or congestion because of the casino. It actually runs better than it did before”.*  
**Jennifer Thompson, Town Administrator, Plainville, MA, Jan 25, 2018.**

*“Where the track and casino is located, it is the most dangerous intersection in town. But it was dangerous long before the casino got there. [...] We actually lost a police officer in a road accident. He was killed by a driver while that intersection was being built. They have done a lot to make it safer.”*  
**Kathleen Parker, Treasurer of Plainville, MA, Feb 1, 2018.**

# SUMMARY OF SOCIAL IMPACTS

## PG & RELATED INDICES

- No impacts to date in PPC H&SC.
  - Lack of impacts likely due to high level of casino gambling (23.2%) that existed prior to PPC plus close proximity of RI and CT casinos that have been in operation since early 1990s.

# SUMMARY OF SOCIAL IMPACTS

## CRIME

- No impacts on overall crime in PPC H&SC. However, PPC H&SC (and Plainville specifically) did see a temporary increase in credit card fraud. In Plainville there also has been increase in reports of lost property and suspicious activity.
  - Part of this increase attributable to increased volume of visitors to area.

# SUMMARY OF SOCIAL IMPACTS

## ATTITUDES

- In the PPC H&SC there appears to be greater satisfaction with current legal availability of gambling.
- In the PPC H&SC opinions are now more evenly split about the benefits of casinos to MA.



# SUMMARY OF SOCIAL IMPACTS

## POPULATION HEALTH

- No impacts to date in the PPC H&SC.

# SUMMARY OF SOCIAL IMPACTS

## DEMOGRAPHICS

- No impacts to date in the PPC H&SC.

# SUMMARY OF SOCIAL IMPACTS

## ENVIRONMENT

- In Plainville there were noise complaints during PPC construction, but not operation. Plainville has experienced an increase in traffic volume and traffic complaints.

Focus on Plainridge Park Casino

# ECONOMIC IMPACTS

<b>DIRECT CASINO EXPENDITURE AND REVENUE</b>	Plainridge Park Casino
	MGM Springfield
	Encore Boston Harbor
<b>BUSINESS ESTABLISHMENTS</b>	Number of Business Establishments
	Changes in Industry Mix
	Casino Impacts on Other Types of Gambling
<b>EMPLOYMENT</b>	Levels, Labor Force Participation, Unemployment
<b>PERSONAL INCOME</b>	Wages
	Poverty Rate
	Gambling Participation as a Function of Income
<b>REAL ESTATE AND HOUSING</b>	Property Values
	Residential Building Permits
	Rental Costs
<b>GOVERNMENT AND FISCAL</b>	Expenditure
	Revenue

# Direct Casino Expenditure & Revenue

- THE BUILDING AND OPERATION OF PPC HAS HAD SEVERAL CLEAR POSITIVE ECONOMIC IMPACTS AT BOTH A STATEWIDE AND REGIONAL LEVEL

# Direct Casino Expenditure & Revenue

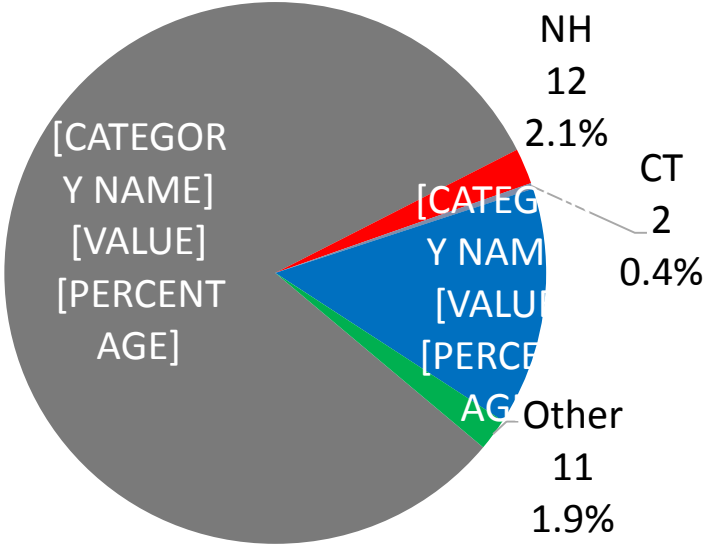
## PPC Construction Expenditure

- \$150.2M spent by Penn National to build PPC, with 86.7% of this money spent within Massachusetts.
  - \$13.3M spent on architecture and engineering (99% in MA); \$6.7M to Metro Boston region and \$6.0M to Bristol and Norfolk counties.
  - \$115.4M spent on building and renovating the structure (85.6% in MA); largest subcategories being construction (\$91.9M) and insurance and bonds (\$15.1M).
  - \$21.5M spent on construction wages (84.6% to MA residents).

# Direct Casino Expenditure & Revenue

## Construction Employment

- # of people on construction payroll averaged 554 across all quarters of construction period, with 81.4% from MA.





# Direct Casino Expenditure & Revenue

## PPC Operating Revenue

- Total operating revenue from PPC (inclusive of horse racing, lottery sales, and non-gambling revenue) approximately:
  - \$104.1M in calendar 2015
  - \$176.0M in calendar 2016
  - \$185.7M in calendar 2017
- Additional ~\$4.0M spent by patrons in 2016 on food, retail shopping, and other amenities in local area as part of their visit.

# Direct Casino Expenditure & Revenue

## Sources of PPC Operating Revenue

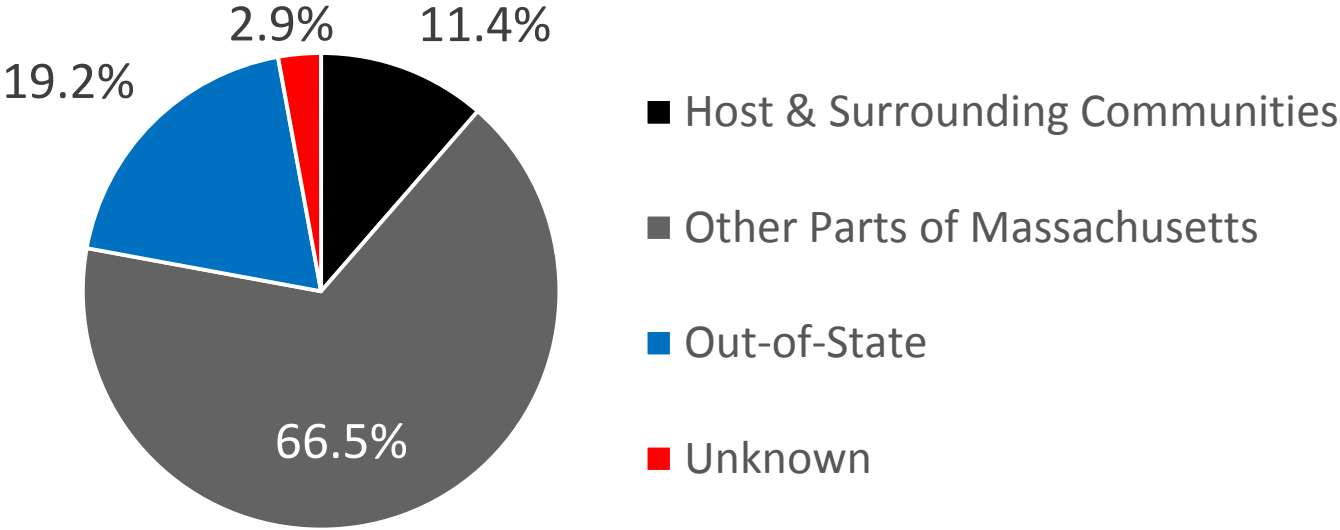
- Gambling constitutes 95% of all operating revenue, with slot machines and electronic table games accounting for 90% of all gambling revenue.

Year	Slot + Table Game Net Revenue	Horse Racing Net Revenue	Lottery Gross Sales	TOTAL Gambling Revenue	TOTAL Non-Gambling Revenue	TOTAL Revenue
2015	\$88.2M	~\$9.5M	\$1.1M	~\$98.8M	\$5.4M	~\$104.1M
2016	\$155.0M	~\$11.5M	\$2.9M	~\$169.5M	\$6.5M	~\$176.0M
2017	\$164.8M	NA	NA	~\$179.0M	NA	~\$185.7M

# Direct Casino Expenditure & Revenue

## Sources of PPC Operating Revenue

- 2016 PPC Patron Survey established 11.4% of PPC patrons from H&SC, 66.5% from other parts of MA, 19.2% from out-of-state, and 2.9% are unknown.



# Direct Casino Expenditure & Revenue

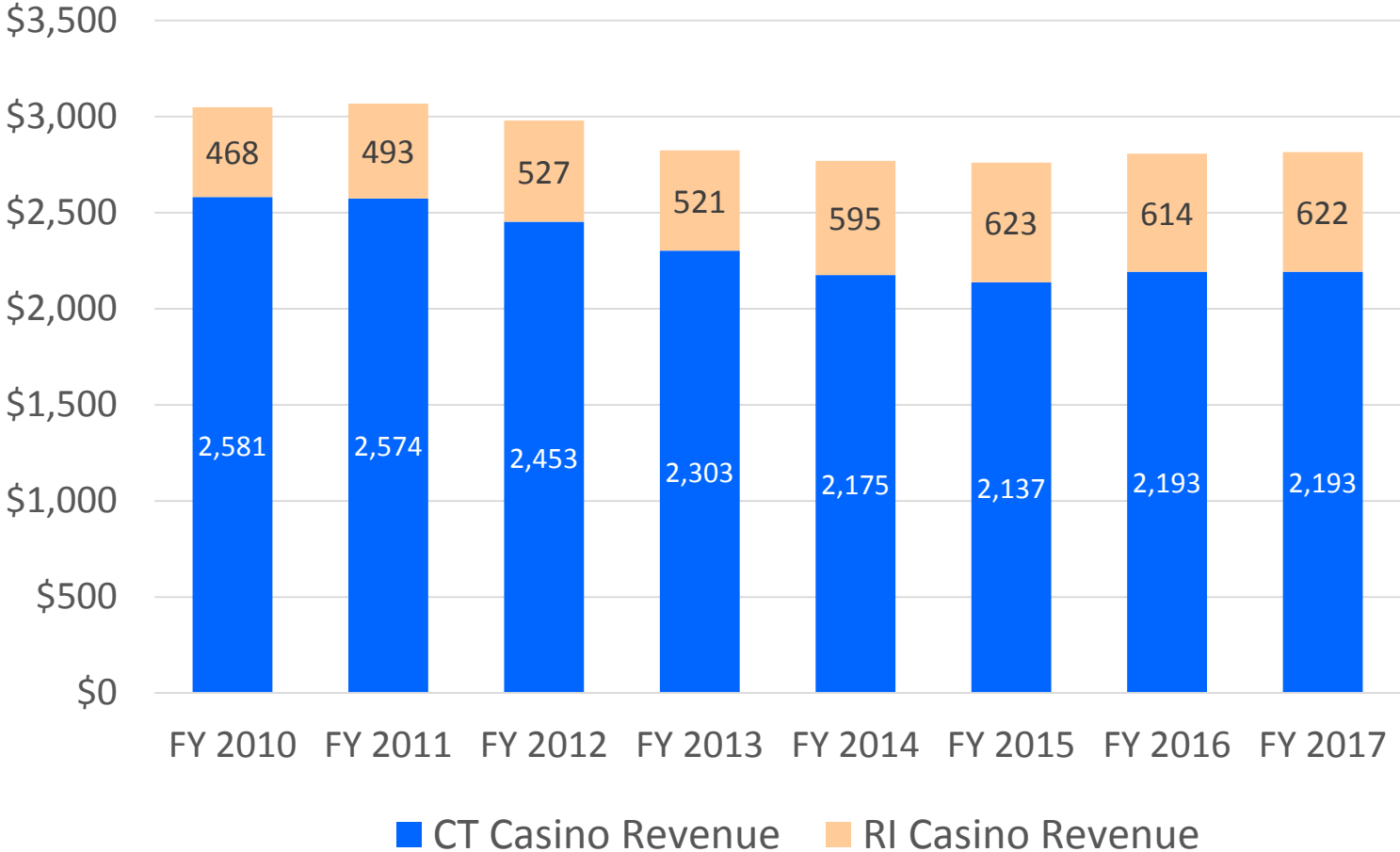
## Sources of PPC Operating Revenue

- PPC Patron Survey indicates largest source of revenue is ‘recaptured revenue’ from MA residents who would have gambled out-of-state if not for PPC.

Source of Revenue	Estimated Revenue	Share of Revenue
Recaptured Spending by In-State Patrons	\$100.0M	58.0%
Reallocated Spending by In-State Patrons	\$36.6M	21.2%
Spending by Out-of-State Patrons	\$36.0M	20.8%
Total	\$172.6M	100.0%

# Direct Casino Expenditure & Revenue

## Net Casino Revenue in RI and CT



# Direct Casino Expenditure & Revenue

## Operational Expenses

- \$129.5M incurred in operational expenses in PPC's first year, with 87.0% spent in MA.
  - \$81.4M paid in gross gaming tax to state of MA.
  - \$30.3M spent on private sector vendors and local, state, and federal governments; 63.2% spent in MA.
  - \$17.8M spent on employee wages in first year, with 35.0% going to employees from SE MA, 28.6% going to Metro Boston region, and 31.7% going to out-of-state employees.

# Direct Casino Expenditure & Revenue

## Operational Employment

- PPC Employee Survey established that 893 people hired in first year (64.2% full-time) with 40.8% from SE MA, 25.6% from Metro Boston, and 28.7% from out-of-state.
- Only 75 people moved to take their employment, with 13 of these moving to Plainville.
- Significant employee turnover, as only 512-570 people employed at any given time (512 in June 2016).

# Direct Casino Expenditure & Revenue

## Operational Employment

- Significant portion of jobs 'new' jobs, as 15.5% of people were unemployed and 34.7% were employed part-time prior to being hired.

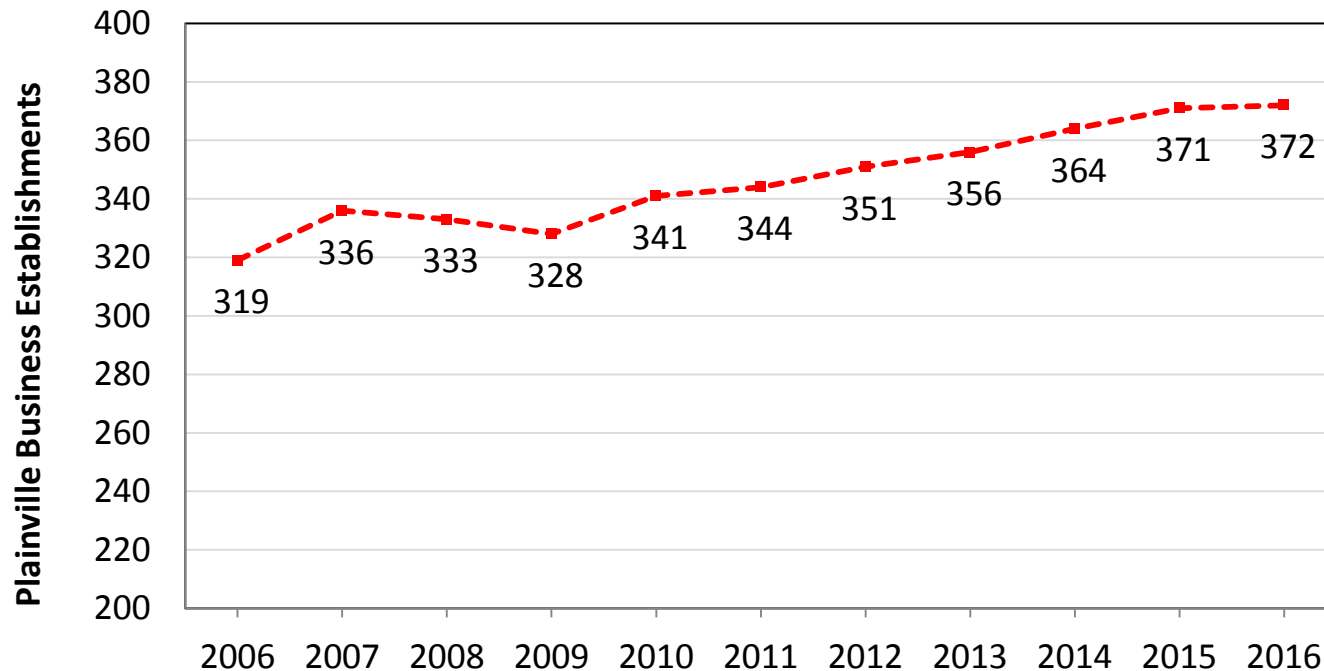


# Business Establishments

- THERE MAY BE A SMALL INCREASE IN THE NUMBER OF BUSINESSES IN PLAINVILLE ATTRIBUTABLE TO PPC.
- IN TERMS OF IMPACTS ON OTHER GAMBLING INDUSTRIES, PPC HAS INCREASED LOTTERY SALES IN PLAINVILLE AND STABILIZED PPC HORSE RACING REVENUE.

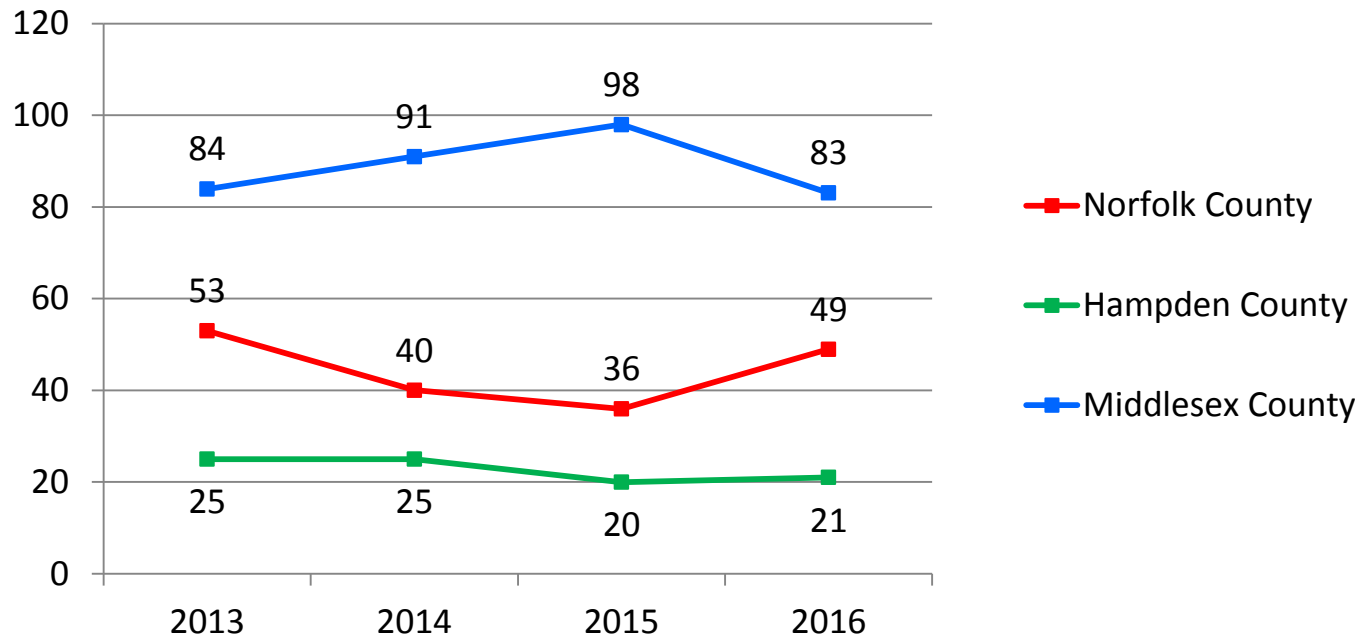
# Business Establishments

- # of businesses in Plainville increased 13% from 2009 to 2016, but with only 2.2% increase from 2014 (364) to 2016 (372).
- From 2009 - 2016 there was 10.6% increase in Surrounding Communities; 9% in Norfolk and Bristol counties; and 16% in MA.



# Business Establishments

- Business bankruptcies from 2015 to 2016 have increased in Norfolk county to greater extent than either Hampden or Middlesex counties. However, this is within the natural year-to-year variation and there is no strong attribution to PPC.



# Business Establishments

## ➤ *Plainville Key Informants:*

*“Wow, we have had an awful lot of influx of new businesses. [...] We have had no problem keeping restaurants in town very very healthy. That was one of the problems, people were saying, ‘Oh it will knock the small restaurants out. No that is not true. They are thriving.”* **Kathleen Parker, Treasurer of Plainville, MA, Feb 1, 2018**

*“We have had a lot of interest in the surrounding area along route one. The sections of route one, where you see the really large developments coming in, they were undeveloped so there was nothing there. So it’s not like they are driving out the small businesses. This area is really becoming a destination.”* **Jennifer Thompson, Town Administrator, Plainville, MA, Jan 25, 2018**

*“On the corner at the diagonal opposite of the casino, I have had plans come through my board for two hotels, a restaurant, a small waste water treatment plant, and some housing, all in that opposite corner.”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018**

# Business Establishments: Gambling

- No significant change in participation in any type of gambling except private betting in the BTPS-Plainville versus FTPS-Plainville.

	BTPS-Plainville 2014		FTPS-Plainville 2016	
	N	%	N	%
Any Gambling	234,793	<b>79.8</b>	238,470	<b>79.6</b>
All lottery	195,115	<b>66.4</b>	200,728	<b>67.2</b>
Traditional Lottery	185,874	<b>63.2</b>	182,647	<b>60.7</b>
Instant Games	119,922	<b>40.8</b>	127,236	<b>42.5</b>
Daily Games	35,514	<b>12.1</b>	40,231	<b>13.5</b>
Raffles	106,932	<b>36.6</b>	110,113	<b>36.9</b>
Out-of-State Casinos	66,291	<b>23.2</b>	82,685	<b>28.3</b>
Sports Betting	43,412	<b>14.8</b>	37,913	<b>12.7</b>
Private Betting	40,018	<b>13.7</b>	26,288	<b>8.8</b>
Horse Racing	15,614	<b>5.3</b>	16,845	<b>5.6</b>
Bingo	9,310	<b>3.2</b>	12,845	<b>4.3</b>
Online Gambling	5,736	<b>2.0</b>	8,464	<b>2.8</b>

N is the total number of respondents who answered the question weighted to the population

# Business Establishments: Gambling

- Although there has been a revenue decline in charitable gambling from 2014 to 2016 in Norfolk county, the decline is smaller compared to the declines in Hampden and Middlesex counties (without casinos).

# Business Establishments: Gambling

➤ Plainridge Racecourse has had a significant increase in number of races since 2014 as well as stabilized overall amount wagered:

- 2013: 780 races; \$38.2M wagered
- 2014: 736 races; \$33.4M wagered
- 2015: 949 races; \$30.3M wagered
- 2016: 1092 races; \$35.8M wagered

# Business Establishments: Gambling

## ➤ Plainville Key Informants:

*“The conditions prior to it [the casino] we did have a race track here and it was struggling [...] it was almost economically unviable at that point. And now, it’s one of the prize places to race. [...] So that has helped out the local economy. And it has rejuvenated the horse racing industry here.”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**

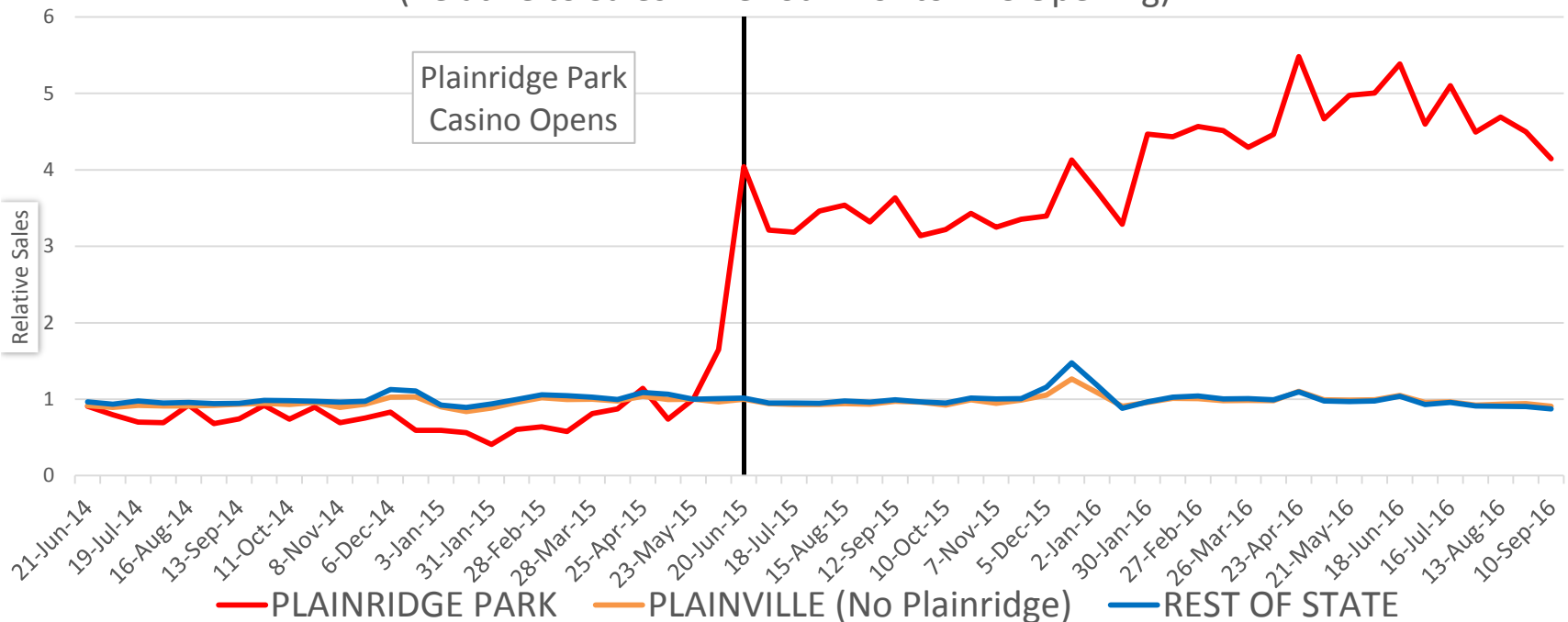
*“[Twin Rivers] have big billboards on route one right near the Plainridge Park Casino. And they weren’t doing that before. [...] They do radio commercials [...] they also do TV commercials locally.”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**



# Business Establishments: Gambling

- Significant increase in lottery sales at Plainridge subsequent to becoming a casino.

Total Lottery Sales over Time: Plainridge Park, Rest of Plainville & Rest of State  
(Relative to Sales in Period Prior to PPC Opening)

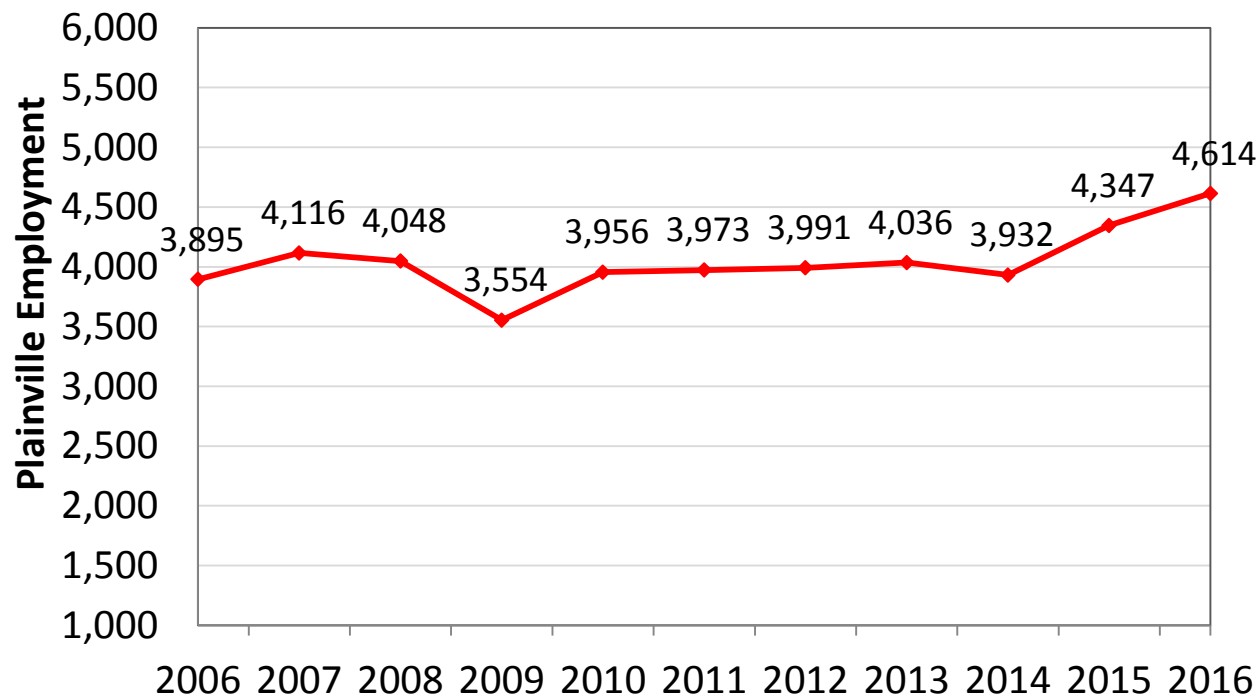


# Employment

- THERE IS EVIDENCE OF AN INCREASE IN EMPLOYMENT NUMBERS IN THE TOWN OF PLAINVILLE PARTLY ATTRIBUTABLE TO PPC.

# Employment

- Plainville's 372 businesses employed 4,614 people in 2016, an increase of 17.3% since 2014. This compares to 4.0% state growth and 3.2% in Norfolk and Bristol counties.



# Employment

- PPC employs 500+ people, with 25.6% of these being people residing in the economic region of the state in which Plainville is located.

# Employment

- When comparing employment numbers in Plainville from 2013/2014 to 2016 for 17 different industry groups, the largest increases were in Construction (88.5 jobs) and Accommodations and Food Services (36.5 jobs), both of which are plausibly related to the building and operation of the casino and consistent with the increased employment reported by PPC related to construction and operation.

# Employment

## ➤ Plainville Key Informants:

*“One of the things that [the casino] promised to do was to reach out to Plainville folks first in terms of employment which they did. They kept their word. [...] They are our largest employer in Plainville. It has certainly had an impact.”* **Jennifer Thompson, Town Administrator, Plainville, MA, Jan 25, 2018.**

*“As far as employment goes, it has definitely been a positive impact.....”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**

# Personal Income

- IT IS POSSIBLE THAT THE SLIGHT INCREASE IN WAGES AND SLIGHT DECREASE IN POVERTY RATE IN PLAINVILLE IS ATTRIBUTABLE TO THE NEW CASINO.

# Personal Income

- Plainville experienced a larger increase in average wage from 2013/2014 to 2016 (8.2%) than either Norfolk & Bristol counties (3.4%) or the state (4.8%).

Region	2010	2011	2012	2013	2014	2015	2016	% increase from 2013/2014 to 2016
Plainville	\$38,721	\$38,263	\$38,047	\$37,507	\$39,658	\$41,663	\$41,740	8.2%
Norfolk & Bristol Counties	\$55,831	\$55,572	\$55,825	\$55,600	\$55,986	\$58,461	\$57,883	3.4%
Massachusetts	\$64,940	\$65,025	\$65,025	\$65,016	\$66,373	\$68,972	\$68,869	4.8%



# Personal Income

- Although the poverty rate increased slightly in both Norfolk county and Massachusetts from 2008/2012 to 2012/2016, it decreased in Plainville, and the 3.6% current rate in Plainville is significantly lower than both Norfolk county and the state.

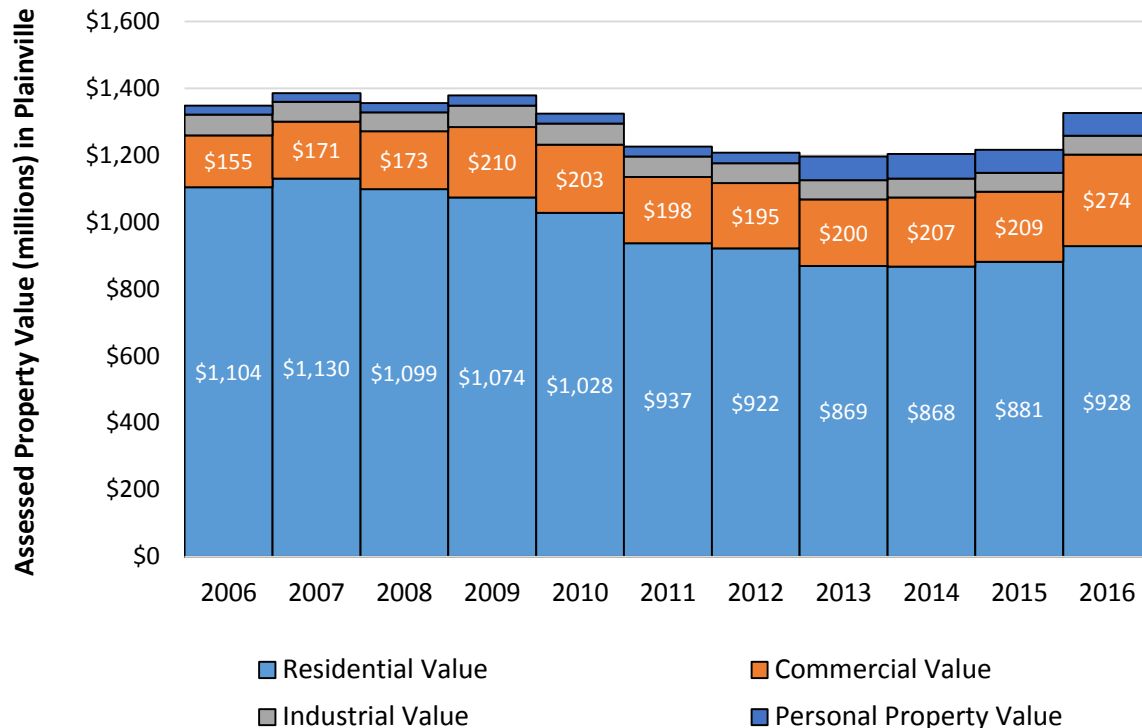
	2008/2012	2012/2016
Plainville	4.7%	3.6%
Norfolk County	6.5%	6.7%
Massachusetts	11.0%	11.4%

# Real Estate and Housing

- IT SEEMS UNLIKELY THAT PPC HAS HAD AN IMPACT ON PROPERTY VALUES OR COMMERCIAL OR INDUSTRIAL RENTAL RATES.

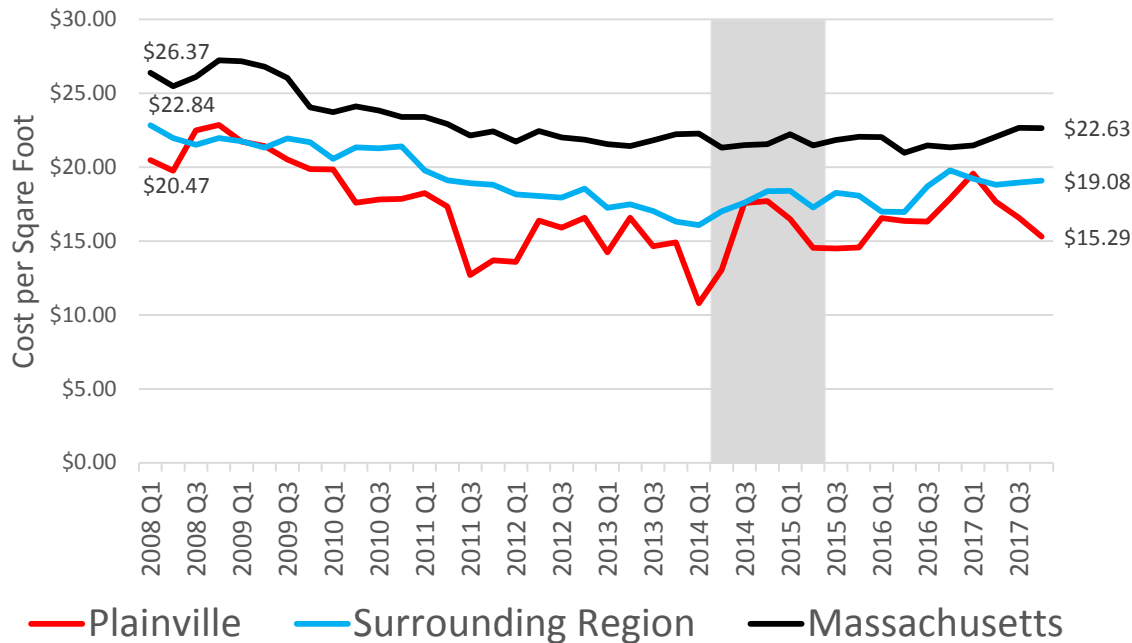
# Real Estate and Housing

- There was a noticeable increase in Plainville property assessment value in FY2016, driven primarily by an increase in residential and commercial values. However, this increase also mirrors a statewide trend.



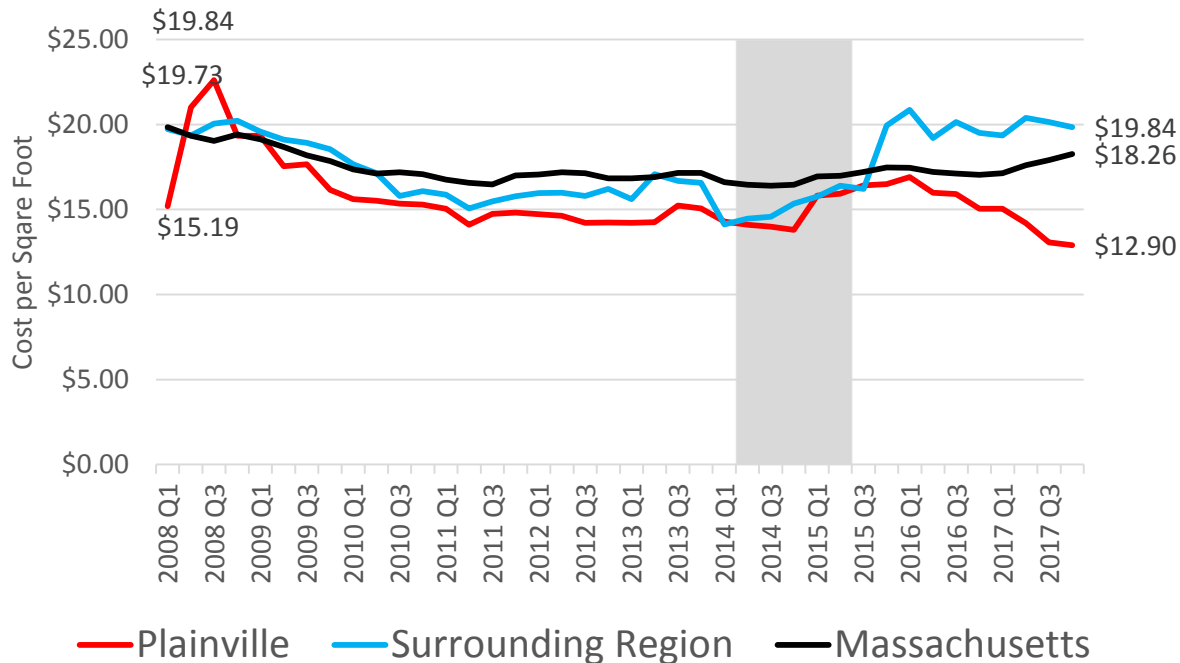
# Real Estate and Housing

- Office commercial lease rates in Plainville have continued to be below rates in the surrounding region and the state.



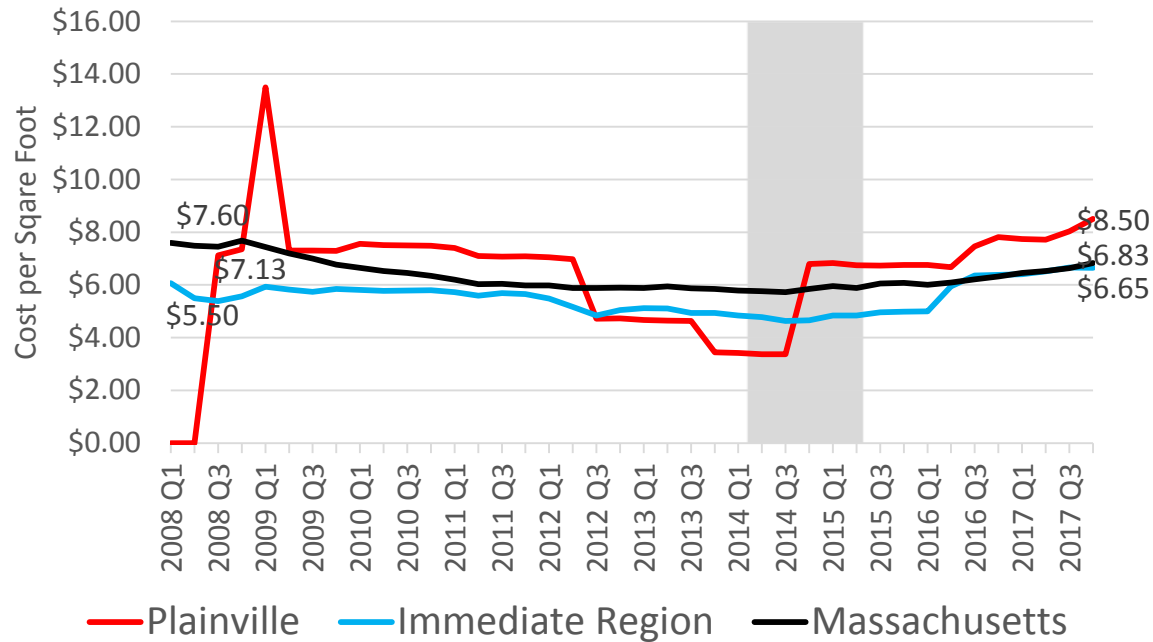
# Real Estate and Housing

- Non-office commercial lease rates have also continued to be below rates in the surrounding region and the state.



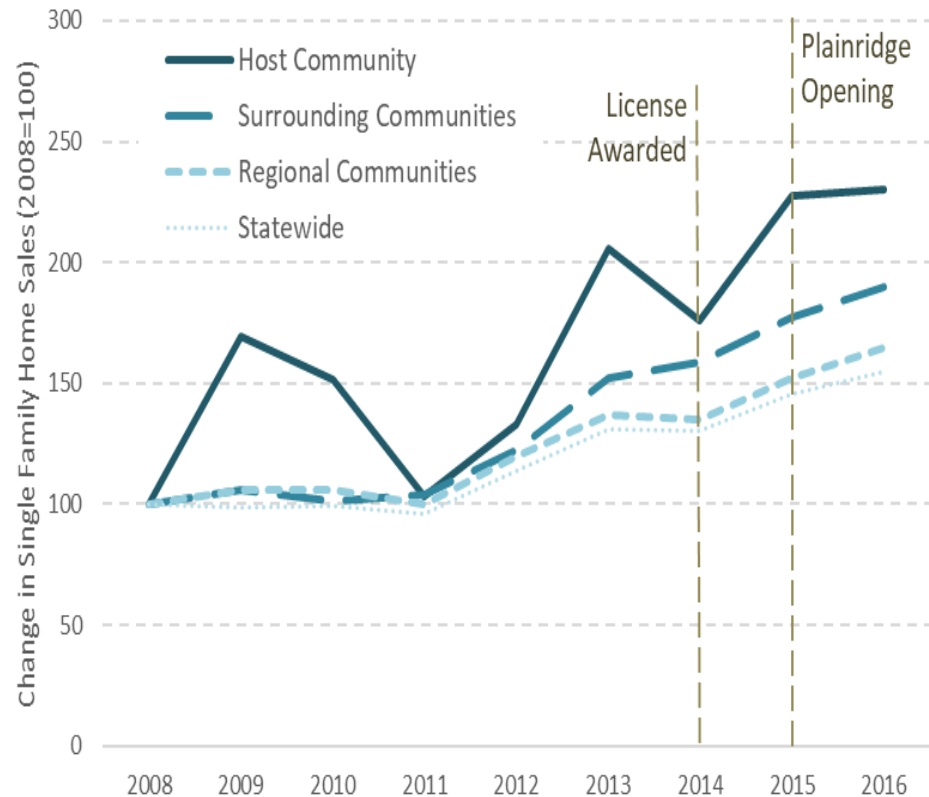
# Real Estate and Housing

- Although industrial lease rates are somewhat higher, they were historically higher prior to 2012 as well.



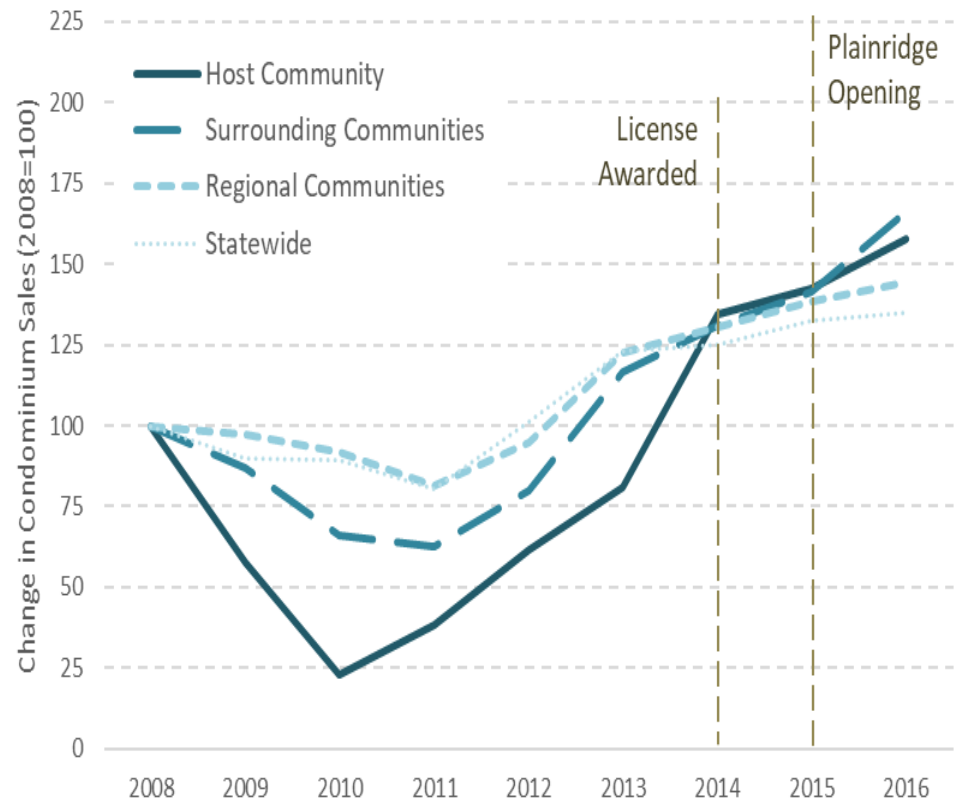
# Small Rise in SF Home Sale Prices

The opening of PPC was associated with a slight increase in the median sale price of Single Family homes in Plainville. However, this rise is comparable to the broader region and the state. Surrounding communities witnessed a more sizable increase.



# Rise in Condominium Prices

The opening of PPC was associated with higher median sale prices of condominiums in both Plainville and surrounding communities. However, this rise may simply be a continuation of trends that started before the license was awarded.





# Preliminary Conclusions – Residential Impacts

- PPC did not negatively impact average home values in Plainville and surrounding communities in first year
- Home and condo prices have risen after PPC opening
- Difficult to attribute to PPC
  - Similar to more distant communities and the state
  - Trend of a rebounding market

# Real Estate and Housing

## ➤ Plainville Key Informants:

*“The sections of route one, where you see the really large developments coming in, they were undeveloped so there was nothing there. So it’s not like they are driving out the small businesses. So far.”* **Jennifer Thompson, Town Administrator, Plainville, MA, Jan 25, 2018**

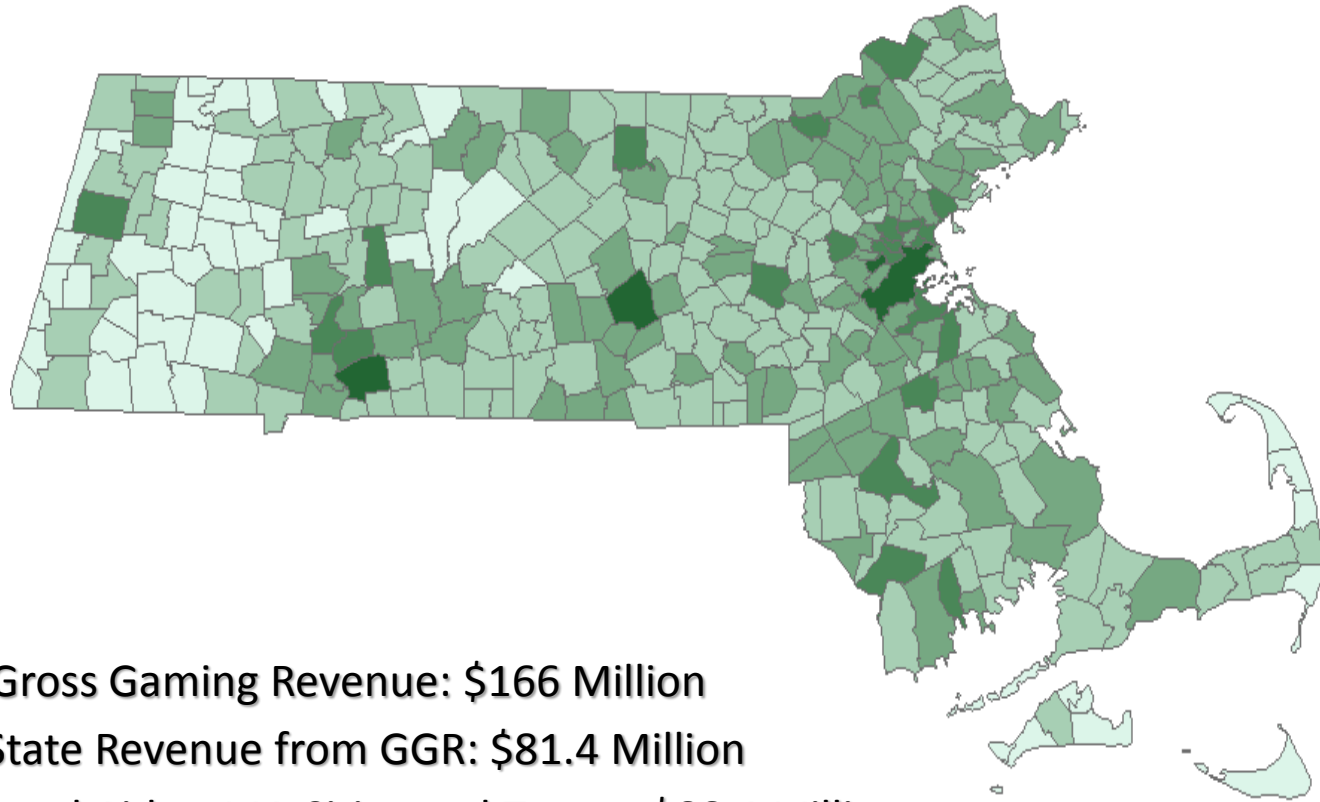
*“I don’t think the casino is big enough to have an impact on the real estate market. There wasn’t a large enough influx of employees to drive the prices up or make residences scarce. I think the whole market has been trending up so it would be difficult to attribute that to Plainridge Park when it is happening all over the state.”* **Lou LeBlanc, Chairman of the Board of Health, Plainville, MA, Mar 1, 2018.**

# Government and Fiscal

- THERE ARE SOME INCREASED GOVERNMENT COSTS. HOWEVER, THIS IS OFFSET BY SIGNIFICANT FINANCIAL GAIN FROM GGR LOCAL AID AND REVENUE FROM HOST AND SURROUNDING COMMUNITY AGREEMENTS.

# Government and Fiscal

## Distribution of Local Aid



**Total Gross Gaming Revenue: \$166 Million**  
**New State Revenue from GGR: \$81.4 Million**  
**New Local Aid to MA Cities and Towns: \$66.4 Million**

# SUMMARY OF ECONOMIC IMPACTS

## DIRECT CASINO EXPENDITURE & REVENUE

- All three casinos are producing significant economic benefits at a statewide level.
- All three casinos are producing significant economic benefits at a regional level.

# SUMMARY OF ECONOMIC IMPACTS

## BUSINESS ESTABLISHMENTS

- In Plainville, PPC has increased lottery sales, stabilized PPC horse racing revenue, and may have increased the overall number of business establishments.

# SUMMARY OF ECONOMIC IMPACTS

## EMPLOYMENT

- PPC has increased local employment.

# SUMMARY OF ECONOMIC IMPACTS

## PERSONAL INCOME

- Possibility of a slight impact at a regional level with an increase in average wages and decrease in poverty rate in Plainville.



# SUMMARY OF ECONOMIC IMPACTS

## REAL ESTATE & HOUSING

- No impact at the statewide level.
- No obvious impacts at a regional level.

# SUMMARY OF ECONOMIC IMPACTS

## GOVERNMENT & FISCAL

- There are minor costs in H&SC s offset by significant revenue gain.