

**WCCTAC Phased Transportation Study for Proposed
Urban Casinos in West Contra Costa County**

EXECUTIVE SUMMARY

The WCCTAC Phased Transportation Study of Proposed Urban Casinos started in early 2006. A consortium of jurisdictions in Contra Costa, Alameda, and Marin Counties, as well as some agencies, funded the Study. The Study was prepared by Dowling Associates of Oakland, CA. Due to the preparation of additional related information – primarily the expansion of the areas studied to include the San Jose/Sunnyvale/Santa Clara MSA and a more detailed analysis of the market demand (and related cost increases) – the study took longer than anticipated to complete.

Of the three scenarios studied:

Scenario A – 1,050 Class II video bingo machines at Casino San Pablo plus full build-out of the Sugar Bowl Project.

Scenario B – 2,500 Class III slot machines at Casino San Pablo only.

Scenario C – 2,500 slot machines at Casino San Pablo plus full build-out of the Sugar Bowl and Point Molate projects.

Scenario A is the most likely to come to fruition and will be highlighted in this Executive Summary. Class III slot machines (full “Las Vegas-style” slots) studied in Scenarios B and C may be prohibited by Federal legislation and the Point Molate Casino is not moving forward as quickly as the Sugar Bowl Casino.

Background:

Casino San Pablo is currently operating with 1,050 class II gaming machines. The Sugar Bowl Casino is proposed on 30 acres of unincorporated land in North Richmond. The proposed land uses include a casino and dining facilities in 225,000 square feet, with 3,000 class III slot machines and 63 gaming tables, a 3,500 space parking garage, and administrative offices. A draft Environmental Impact Statement for the project was completed in February 2006. An Indian Lands Determination by the Bureau of Indian Affairs is currently in process. Current information on the status of the Point Molate Casino was not available as of the print date of this document.

Scenario A:

The data in the “WCCTAC Phased Transportation Study for Proposed Urban Casinos” for this scenario includes:

- Over 9,000,000 vehicles trips projected in 2011.
- 3,300 employees working at the facility.
- Documented popularity of Class III machines at the Sugar Bowl Casino over Class II machines at Casino San Pablo and thereby almost 40% more vehicles and visitors at Sugar Bowl.
- Casino trip distribution includes 78.7% of the trips on I-80 Eastbound to Casino San Pablo and 72.4% of the trips on I-80 eastbound from Sugar Bowl and Point Molate. I-80 is the most congested freeway in the morning peak hour and is virtually gridlocked.
- Currently six of the 46 intersections counted are at Level of Service (LOS) E or F. With the addition of the trips in Scenario A in 2011, the number of intersections at LOS E or F increases to 17.
- Long-term (2030) the number of LOS F intersections with Scenario A (in the morning and evening peak periods and on Saturdays) increases to 45, including: I-80/San Pablo Dam Road; I-80 at El Portal and at San Pablo Dam Road; Richmond Parkway at Parr Boulevard; and 101/Sir Francis Drake in Marin.
- Bicycle and pedestrian facilities do not exist in the vicinity of the proposed Sugar Bowl Casino and are limited in the vicinity of Casino San Pablo.
- Current gaming revenue in the San Francisco MSA is well under its revenue potential.
- The current traffic signals at the Richmond Parkway/Parr Boulevard and at 101/Sir Francis Drake will not be able to handle the increased casino traffic in 2011 or 2030.
- If the Sugar Bowl Casino moves forward, the project would produce 1,600 to 1,900 local trips, requiring the addition of at least two additional lanes of traffic on the Richmond Parkway.

Summary:

The WCCTAC Phased Transportation Study for Proposed Urban Casinos in West Contra Costa provides detailed information on three scenarios and this Executive Summary highlights the effects of Scenario A on the community. The Study data can be used as the “2007 baseline” for future studies or negotiations should any/all of the proposed urban casinos move forward to a further planning stage.

FINAL REPORT -
Phased Transportation Study for Proposed
Urban Casinos in West Contra Costa County

Prepared for:
West Contra Costa Transportation Advisory Committee

Submitted by:

Dowling Associates, Inc.

Transportation Engineering • Planning • Research • Education



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December 28, 2007



December 28, 2007

West Contra Costa Transportation Advisory Committee
13831 San Pablo Avenue
San Pablo, CA 94806
Attn: Lisa Hammon, Managing Director

Subject: FINAL - Phased Transportation Study for Proposed Urban Casinos P05129
in West Contra Costa County

Dear Lisa:

Dowling Associates is pleased to submit this final report of the Phased Transportation Study for Proposed Urban Casinos in West Contra Costa County.

Please do not hesitate to call me at (510) 839-1742 ext. 117 should you have questions or comments. I look forward to reviewing this with you and receiving comments.

Sincerely,

Dowling Associates, Inc.

Mark Bowman, P.E.
Vice President

Allen Huang
Senior Transportation Engineer

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INTRODUCTION

Indian gaming in California has expanded rapidly in recent years, and had been restricted to rural and semi-rural areas. However, in August 2003, U.S. District Judge David Levi ruled that the Lytton Band of Pomo Indians could proceed with the acquisition of Casino San Pablo. This decision removed one of the major obstacles to urban Indian gaming in California¹. Increasingly, city and county governments are considering permitting casino projects in urban areas because of potential increases in city tax revenues and employment opportunities.

There are three different types of gaming facilities: Class I, facilities with social games with minimal prizes, such as arcade games; Class II, facilities in which players compete against each other for money, such as bingo and other card games; and, Class III, facilities where players compete against the house or machines, such as slot machines, roulette, craps, and blackjack². Class I facilities are common and Class II facilities, while in limited supply, exist already in several California cities. Operating Class III facilities is not legal in California except under Indian gaming regulations. The following is a summary of three proposed Class III casino projects to be located in Western Contra Costa County.

Casino San Pablo, an establishment of the Lytton Band of Pomo Indians, is located at San Pablo Avenue and San Pablo Dam Road in the city of San Pablo's southern city limit near Richmond. The voter-approved card room called Casino San Pablo began operations in 1995³, although it has been an Indian gaming facility for about 3 years. It is open 24 hours a day, 7 days a week, and currently operates 800 Class II gaming machines and 30 casino table games. In addition to gaming, the casino has a full-service restaurant and lounge, as well as a snack bar. The area around the casino is urbanized, including a major medical center, several retail establishments, restaurants, and housing. Casino San Pablo had plans to expand its facility to accommodate an additional 5,000 slot machines, but has since revised this number to 2,500 slot machines.

Sugar Bowl Rancheria, a proposed development of the Scotts Valley Band of Pomo Indians, would be located on 30 acres of unincorporated land in North Richmond at the intersection of Richmond Parkway and Parr Boulevard. The 225,000 square-foot facility would include a gambling hall, dining and lounge facilities, retail establishments, a four-story 3,500-space parking garage, and administrative offices⁴. The area surrounding the proposed development currently consists of industrial uses and includes the West Contra Costa's sanitary landfill.

Point Molate Casino/Resort, a proposed development of the Guidiville Band of Pomo Indians, would be located on 415 acres of land in the city of Richmond off of Western Drive along the San Francisco Bay shoreline. Preliminary plans for this development include

¹ The Association of Bay Area Governments webpage. http://www.abag.ca.gov/current_issues/Indian-Gaming/indexgaming.html. Accessed April 18, 2006.

² Iowa General Assembly, Legislative Service Bureau. Legislative Guide to Indian Gaming Regulatory Act. December 1999. <http://www.legis.state.ia.us/Central/LSB/Guides/indiagam.htm>. Accessed April 18, 2006.

³ The press release in 2003, <http://www.ci.san-pablo.ca.us/main/casinopress.htm>

⁴ *Scotts Valley Band of Pomo Indians. Fee-to-Trust and Casino Draft Environmental Impact Statement*. February 2006. <http://reports.analyticalcorp.net/scottsvalley/deis/default.htm>. Accessed April 18, 2006.

300,000 square feet of retail, 150,000 square feet of gaming, 25,000 square feet of entertainment and convention space, 1,100 hotel rooms, a tribal cultural center, tribal government buildings, police and fire services, a ferry terminal, public transportation, some housing, 220 acres of open space, 40 acres of public parks, a public trail, and 3,000 parking spaces⁵. The area of the proposed development is a former naval fuel depot and consists of about 29 housing units, a few neighborhood-serving buildings, a pier, and a warehouse, all of which are currently abandoned.

Contra Costa County Supervisors Gioia and Uilkema convened a group of stakeholders to discuss impacts (including transportation) when Casino San Pablo was considering “Las Vegas” style slot machines. The group has continued to meet, focused on transportation impacts, and has raised funds for this phased traffic study. This group is currently studying the incremental and cumulative transportation impacts of the expansion of Casino San Pablo, plus North Richmond Sugar Bowl Casino and Point Molate Fee-to-Trust and Gaming Resort development project.

The key elements of this Phased Transportation Study for Proposed Urban Casinos are to evaluate the casino trip generation, casino trip distribution and document the levels of service of major studied intersections, arterials, freeways and ramps.

⁵ US Environmental Protection Agency. Federal Register: March 11, 2005, Volume 70, Number 47. *Notice of Intent to Prepare an Environmental Impact Statement/Environmental Impact Report for the Guidiville Band of Pomo Indians of the Guidiville Rancheria's Proposed Trust Acquisition and Casino/Resort Project, City of Richmond, Contra Costa County, CA.* <http://www.epa.gov/fedrgstr/EPA-IMPACT/2005/March/Day-11/i4880.htm> Accessed April 18, 2006.

Study Area

West Contra Costa County includes the cities of El Cerrito, Hercules, Pinole, Richmond, and San Pablo, and the unincorporated areas of west Contra Costa County, including Rodeo-Crockett. The study area was expanded to include Marin County and Alameda County. Forty-six intersections that were deemed mostly likely to be affected by the proposed projects were evaluated under three project scenarios. Exhibit 1, Exhibit 2 and Exhibit 3 present the study intersections in each jurisdiction.

ID	Street1	Street2	City	ID	Street1	Street2	City
1	San Pablo Dam Rd	San Pablo Ave	San Pablo	24	Western Dr	I-580 Ramp	Richmond
2	San Pablo Dam Rd	Contra Costa Ave	San Pablo	25	I-580 WB Ramp	Castro St	Richmond
3	San Pablo Dam Rd	Ventura Ave	San Pablo	26	San Pablo Ave	Solano Ave	Richmond
4	San Pablo Dam Rd	I-80 WB Ramp	San Pablo	27	I-580 WB Ramp	S 23rd St	Richmond
5	San Pablo Dam Rd	I-80 EB Ramp	San Pablo	28	I-580 EB Ramp	Marina Bay Pky	Richmond
6	San Pablo Ave	Rheem Ave	San Pablo	29	San Pablo Ave	Garvin Ave	Richmond
7	San Pablo Ave	Vale Rd	San Pablo	30	San Pablo Ave	Robert Miller Dr	San Pablo
8	San Pablo Ave	Church Ln	San Pablo	31	San Pablo Ave	Richmond Parkway	San Pablo
9	San Pablo Ave	23rd St	San Pablo	32	San Pablo Ave	Rumrill Blvd	San Pablo
10	San Pablo Ave	McBryde Ave	Richmond	33	San Pablo Ave	Appian Way	Pinole
11	San Pablo Ave	Roosevelt Ave	Richmond	34	San Pablo Ave	Pinole Valley Rd	Pinole
12	San Pablo Ave	Barrett Ave	Richmond	35	San Pablo Ave	Sycamore Ave	Hercules
13	Swans Way	Barrett Ave	Richmond	36	23rd St	Market Ave	San Pablo
14	El Portal Dr	Church Ln	San Pablo	37	Sir Francis Drake Blvd	101 SB Ramp	Greenbrae
15	El Portal Dr	I-80 WB On-Ramp	San Pablo	38	Sir Francis Drake Blvd	101 NB Ramp	Larkspur
16	El Portal Dr	San Pablo Dam Rd	El Sobrante	39	Sir Francis Drake Blvd	Andersen Dr	San Rafael
17	El Portal Dr	I-80 EB Ramp	El Sobrante	40	Third St	Irwin St	San Rafael
18	El Portal Dr	I-80 WB Off-Ramp	El Sobrante	41	Third St	Hetherston St	San Rafael
19	San Pablo Dam Rd	Appian Way	El Sobrante	42	Third St	Tamalpais Ave	San Rafael
20	23rd St	Rheem Ave	Richmond	43	Buchanan St	I-80 NB Ramp	Albany
21	29th St	Rheem Ave	Richmond	44	Buchanan St	I-80 SB Ramp	Albany
22	Brookside Dr	Rumrill Blvd	San Pablo	45	San Pablo Ave	John Muir Parkway	Hercules
23	Richmond Parkway	Parr Blvd	San Pablo	46	San Pablo Ave	Hercules Avenue	Hercules

Exhibit 1: Study Intersections

City	Total
San Pablo	17
Richmond	12
El Sobrante	4
San Rafael	4
Hercules	3
Albany	2
Pinole	2
Greenbrae	1
Larkspur	1
Total	46

Exhibit 2: Total Number of Intersections in Each City

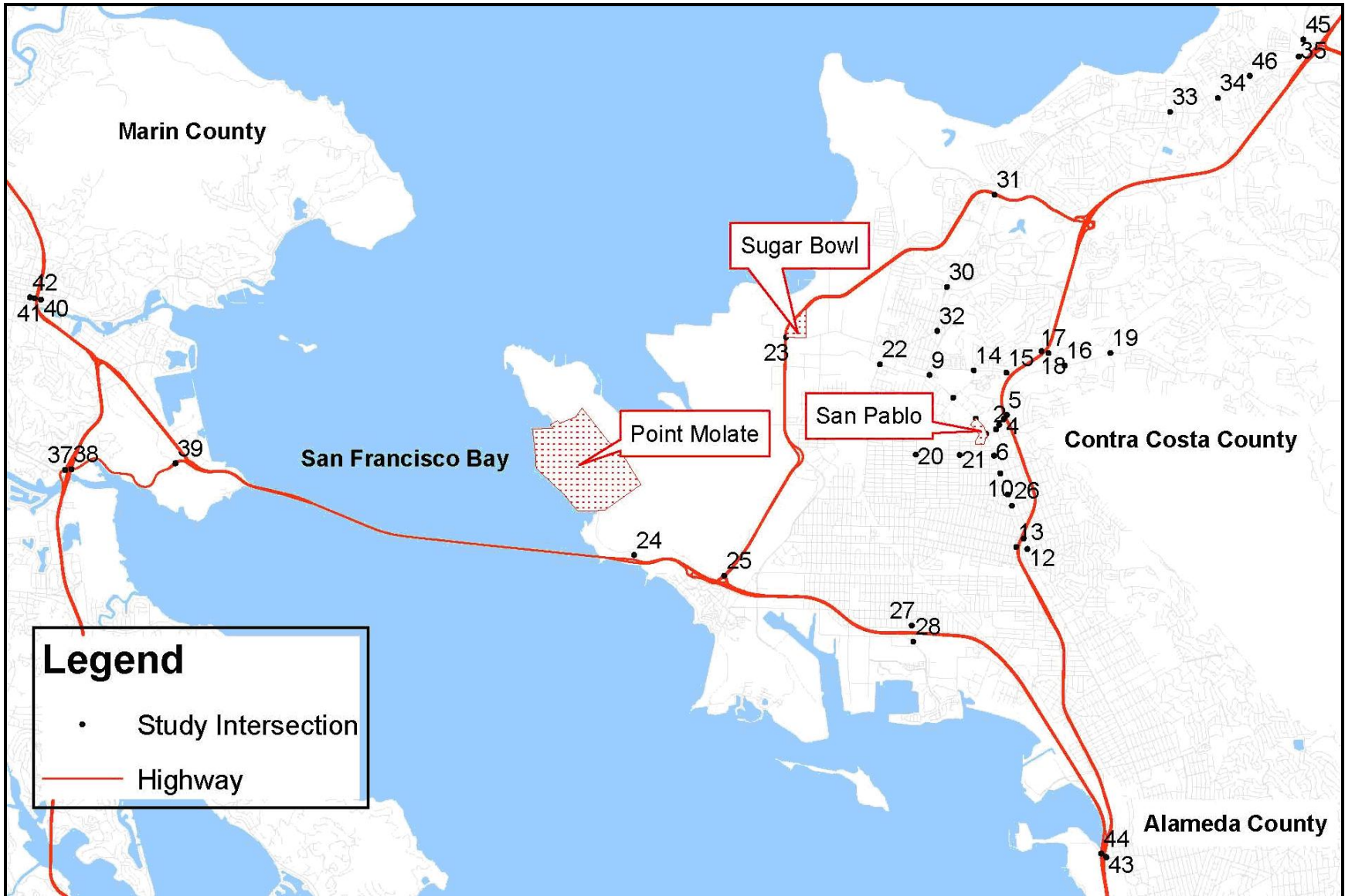


Exhibit 3: Study Area Map

PROJECT AND SCENARIO DESCRIPTIONS

This report summarizes the existing roadway conditions and the project impacts on the near-term (2011)⁶ and long-term (2030) transportation and circulation system resulting from vehicle trips associated with three casino development scenarios:

(A) 1,050 Class II video bingo machines at Casino San Pablo plus full build-out of the Sugar Bowl project.

(B) 2,500 Class III slot machines at Casino San Pablo only.

(C) 2,500 slot machines at Casino San Pablo plus full build-out of the Sugar Bowl and Point Molate projects.

The methodology used to assess the impacts of each development scenario was developed through discussion with the West Contra Costa Transportation Advisory Committee and is based on guidelines for traffic impact analyses identified in Contra Costa Transportation Authority's (CCTA's) Technical Procedures.

Data Collection

WCCTAC provided a number of historical traffic reports, such as *Regional Signal Timing Program* from the Metropolitan Transportation Commission. Available historical traffic counts from the reports did not include all the study intersections. A data collection plan was developed and reviewed by WCCTAC staff to fill the gaps in existing data. Additional surveys were performed in this study.

Exhibit 4 shows a final data collection plan of intersection turning movement counts. All the locations surveyed by WILTEC (subcontracted by Dowling Associates for data collections) include pedestrian and bicycle counts. Traffic data were collected during the general peak hours on weekday and Saturday.

⁶ The year 2011 was selected based on the availability of data from the U.S. Bureau of Economic Analysis ("BEA").

ID	Street1	Street2	City	AM Data	PM Data	Sat Data
1	San Pablo Dam Rd	San Pablo Ave	San Pablo	WCCTAC	WCCTAC	WCCTAC
2	San Pablo Dam Rd	Contra Costa Ave	San Pablo	WCCTAC	WCCTAC	None
3	San Pablo Dam Rd	Ventura Ave	San Pablo	WCCTAC	WCCTAC	None
4	San Pablo Dam Rd	I-80 WB Ramp	San Pablo	WCCTAC	WCCTAC	DOWLING
5	San Pablo Dam Rd	I-80 EB Ramp	San Pablo	WCCTAC	WCCTAC	DOWLING
6	San Pablo Ave	Rheem Ave	San Pablo	WCCTAC	WCCTAC	None
7	San Pablo Ave	Vale Rd	San Pablo	WCCTAC	WCCTAC	DOWLING
8	San Pablo Ave	Church Ln	San Pablo	WCCTAC	WCCTAC	WCCTAC
9	San Pablo Ave	23rd St	San Pablo	WCCTAC	WCCTAC	DOWLING
10	San Pablo Ave	McBryde Ave	Richmond	WCCTAC	WCCTAC	WCCTAC
11	San Pablo Ave	Roosevelt Ave	Richmond	WCCTAC	WCCTAC	DOWLING
12	San Pablo Ave	Barrett Ave	Richmond	WCCTAC	WCCTAC	WCCTAC
13	Swans Way	Barrett Ave	Richmond	WCCTAC	WCCTAC	WCCTAC
14	El Portal Dr	Church Ln	San Pablo	WCCTAC	WCCTAC	WCCTAC
15	El Portal Dr	I-80 WB On-Ramp	San Pablo	WCCTAC	WCCTAC	WCCTAC
16	El Portal Dr	San Pablo Dam Rd	El Sobrante	WCCTAC	WCCTAC	WCCTAC
17	El Portal Dr	I-80 EB Ramp	El Sobrante	WCCTAC	WCCTAC	WCCTAC
18	El Portal Dr	I-80 WB Off-Ramp	El Sobrante	WCCTAC	WCCTAC	WCCTAC
19	San Pablo Dam Rd	Appian Way	El Sobrante	WCCTAC	WCCTAC	WCCTAC
20	23rd St	Rheem Ave	Richmond	DOWLING	DOWLING	DOWLING
21	29th St	Rheem Ave	Richmond	DOWLING	DOWLING	None
22	Brookside Dr	Rumrill Blvd	San Pablo	DOWLING	DOWLING	DOWLING
23	Richmond Parkway	Parr Blvd	San Pablo	WCCTAC	WCCTAC	DOWLING
24	Western Dr	I-580 Ramp	Richmond	DOWLING	DOWLING	DOWLING
25	I-580 WB Ramp	Castro St	Richmond	WCCTAC	WCCTAC	DOWLING
26	San Pablo Ave	Solano Ave	Richmond	WCCTAC	WCCTAC	None
27	I-580 WB Ramp	S 23rd St	Richmond	DOWLING	DOWLING	DOWLING
28	I-580 EB Ramp	Marina Bay Pky	Richmond	DOWLING	DOWLING	DOWLING
29	San Pablo Ave	Garvin Ave	Richmond	WCCTAC	WCCTAC	None
30	San Pablo Ave	Robert Miller Dr	San Pablo	WCCTAC	WCCTAC	None
31	San Pablo Ave	Richmond Parkway	San Pablo	WCCTAC	WCCTAC	DOWLING
32	San Pablo Ave	Rumrill Blvd	San Pablo	WCCTAC	WCCTAC	None
33	San Pablo Ave	Appian Way	Pinole	DOWLING	DOWLING	None
34	San Pablo Ave	Pinole Valley Rd	Pinole	DOWLING	DOWLING	None
35	San Pablo Ave	Sycamore Ave	Hercules	DOWLING	DOWLING	None
36	23rd St	Market Ave	San Pablo	DOWLING	DOWLING	None
37	Sir Francis Drake Blvd	101 SB Ramp	Greenbrae	DOWLING	DOWLING	DOWLING
38	Sir Francis Drake Blvd	101 NB Ramp	Larkspur	DOWLING	DOWLING	DOWLING
39	Sir Francis Drake Blvd	Andersen Dr	San Rafael	DOWLING	DOWLING	DOWLING
40	Third St	Irwin St	San Rafael	DOWLING	DOWLING	DOWLING
41	Third St	Hetheron St	San Rafael	DOWLING	DOWLING	DOWLING
42	Third St	Tamalpais Ave	San Rafael	DOWLING	DOWLING	DOWLING
43	Buchanan St	I-80 NB Ramp	Albany	DOWLING	DOWLING	DOWLING
44	Buchanan St	I-80 SB Ramp	Albany	DOWLING	DOWLING	DOWLING
45	San Pablo Ave	John Muir Parkway	Hercules	DOWLING	DOWLING	DOWLING
46	San Pablo Ave	Hercules Avenue	Hercules	DOWLING	DOWLING	DOWLING

Exhibit 4: Intersection Turning Movement Data Collection Plan

Driveway Traffic Counts at Casino San Pablo

Driveway traffic counts were conducted from 7:00 to 9:00 AM and 4:00 to 8:00 PM on Wednesday, December 14, 2005 and from 12:00 to 2:00 PM and 6:00 to 8:00 PM on Saturday, December 17, 2005.



Exhibit 5: Driveway Locations at Casino San Pablo

On Wednesday, there were 256 vehicles entering and exiting the Casino San Pablo during the morning peak hour and 600 vehicles during the evening peak hour. On Saturday, there were 387 vehicles entering and exiting the casino during midday peak hour and 427 vehicles during evening peak hour as shown in Exhibit 6.

Peak Hour Volume		Sum	Driveway 1	Driveway 2	Driveway 3	Driveway 4	Total
Wednesday AM	IN	118	104	3	10	1	256
	OUT	138	16	7	46	69	
Wednesday PM	IN	364	332	10	20	2	600
	OUT	236	41	38	144	13	
Saturday Midday	IN	191	156	5	27	3	387
	OUT	196	28	18	120	30	
Saturday PM	IN	226	183	8	30	5	427
	OUT	201	34	28	112	27	

Exhibit 6: Peak Hour Traffic Volumes at each Driveway

License Plate Survey at Casino San Pablo

A license plate survey was conducted on the same days and hours as the driveway traffic counts. The survey recorded 247 license plates on Wednesday and 109 license plates on Saturday. Exhibit 7 and Exhibit 8 show the county distributions where those vehicles were registered.

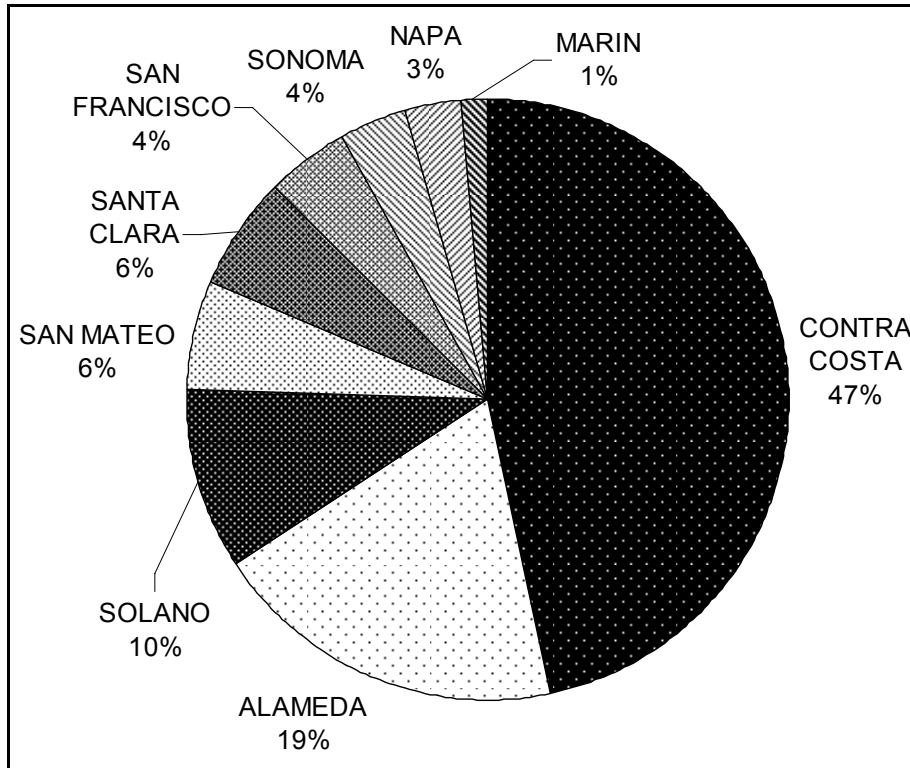


Exhibit 7: Surveyed Vehicles' Registered Counties in Bay Area Counties



Exhibit 8: Surveyed Vehicles' Registered Counties in California

Parking Demand Survey at Casino San Pablo

A parking demand survey was conducted on Wednesday December 21, 2006. There were 633 cars parked in the lot during the survey time period. Exhibit 9 shows the surveyed parking demand ratio (total parked vehicles divided by total gaming positions).

Bingo Machines	Gaming Tables	Seats per Table
805	40	7
Total Gaming Positions	Parking Demand	Parking Demand Ratio
1,085	633	0.58

Exhibit 9: Surveyed Parking Demand Ratio

CASINO TRIP GENERATION

ITE Casino Trip Generation

The casino trip generation rate (vehicle trip per gaming position) published by the Institute of Transportation Engineers (ITE) was used for the preliminary evaluation. Exhibit 10 shows a comparison between the surveyed casino trip generation rate and ITE's casino trip generation rates.

Trip Generation / Gaming Seat	Casino San Pablo ⁷	Casino San Pablo Seasonal Adjusted Factor ⁸	ITE Las Vegas Local Casino ⁹
Wednesday AM	0.24	0.28	0.47
Wednesday PM	0.55	0.66	0.79
Saturday Midday	0.36	0.43	N/A
Saturday PM	0.39	0.47	N/A

Exhibit 10: Surveyed Casino Trip Generation Rates vs. ITE Rates

ECONorthwest Casino Trip Generation

The casino trip generation in this study was estimated based on a casino market model developed by ECONorthwest. The ECONorthwest casino marketing model takes into account driving times to casinos, income demographics, age demographics, and seasonal population patterns to estimate gaming revenue and visitor forecasts for each zip code area in the San Francisco-Oakland-Fremont and the San Jose-Santa Clara metropolitan statistical areas (MSA). For each zip code in the MSA, the casino model calculated annual vehicle trips for year 2011, when the casinos are expected to be completed and the level of activity is expected to be stable.

Two reports of casino trip generation were provided by ECONorthwest. The first report was delivered on January 15, 2007 and the second was delivered on April 30, 2007. The first report developed trip data for project Scenarios B and C. The second report developed trip data for Scenario A and expanded the study area to include trips from San Jose and Santa Clara County. Information taken from the ECONorthwest studies is provided in Exhibit 11. The detailed information of each casino is provided in Exhibit 12 through Exhibit 14. This information includes pass-by trips,¹⁰ which are trips that would already be on the area roadways. The proposed casino developments would cause these pass-by vehicles to use the project driveways, but would not add these volumes to the street system. ECONorthwest suggested 40% of the trips for Casino San Pablo would be pass-by trips and 10% of the trips for the Sugar Bowl and Point Molate Casinos would be pass-by trips.

⁷ Based on observed trips shown in Exhibit 6 for 1,085 gaming position.

⁸ Seasonally adjusted by 1.2 from *Gaming Casino Traffic*, published by ITE.

⁹ *Recalibration of Trip Generation Model for Las Vegas Hotel/Casinos* (Institute of Transportation Engineers, 2002)

¹⁰ *Pass-By trips are attracted from traffic passing the project site on an adjacent street or roadway that offers direct access to the project site. Directed linked trips add traffic to streets adjacent to a site, but many not add traffic to the area's major travel routes.* (Chapter 5, ITE Trip Generation Handbook, 2nd Edition, June 2004).

Exhibit 11: Summary of Annual Gaming Revenues, Employments and Visitors			
Casinos in 2011	Scenario A	Scenario B	Scenario C
Casino operations:			
Gaming revenues	\$813,300,835	\$585,737,186	\$1,597,334,130
Employees (FTE's) ¹¹	3,300	2,500	7,250
Individual Visitors:			
Patrons	15,152,443	10,280,551	27,820,621
Employees & other	815,760	618,000	1,792,200
Total	15,968,203	10,898,551	29,612,821
Vehicle Visits:			
Patrons	8,418,024	5,711,417	15,455,901
Employees & other	709,357	537,391	1,558,435
Total Vehicles	9,127,380	6,248,809	17,014,335

Exhibit 12: Annual Data of Scenario A			
Casinos in 2011	San Pablo Class II	Sugar Bowl Class III	Total
Casino operations:			
Gaming revenues	\$307,333,524	\$505,967,311	\$813,300,835
Employees (FTE's)	1,150	2,150	3,300
Individual Visitors:			
Patrons	6,233,647	8,918,796	15,152,443
Employees & other	284,280	531,480	815,760
Total	6,517,927	9,450,276	15,968,203
Vehicle Visits:			
Patrons	3,463,137	4,954,887	8,418,024
Employees & other	247,200	462,157	709,357
Total Vehicles	3,710,337	5,417,043	9,127,380

¹¹ Full time equivalent employee (approx. 2,040 hours of work).

Exhibit 13: Annual Data of Scenario B	
Casino in 2011	Only Casino San Pablo Class-III
Casino operations:	
Gaming revenues	\$585,737,186
Employees (FTE's)	2,500
Individual Visitors:	
Patrons	10,280,551
Employees & other	618,000
Total	10,898,551
Vehicle Visits:	
Patrons	5,711,417
Employees & other	537,391
Total Vehicles	6,248,809

Exhibit 14: Annual Data of Scenario C				
Casinos in 2011	San Pablo	Sugar Bowl	Point Molate	Total
Casino operations:				
Gaming revenues	\$560,878,760	\$446,279,525	\$590,175,846	\$1,597,334,130
Employees (FTE's)	2,400	2,000	2,850	7,250
Individual Visitors:				
Patrons	9,847,869	7,870,844	10,101,908	27,820,621
Employees & other	593,280	494,400	704,520	1,792,200
Total	10,441,149	8,365,244	10,806,428	29,612,821
Vehicle Visits:				
Patrons	5,471,038	4,372,691	5,612,171	15,455,901
Employees & other	515,896	429,913	612,626	1,558,435
Total Vehicles	5,986,934	4,802,604	6,224,797	17,014,335

Effect of Switching from Class-II to Class-III Gaming

ECONorthwest has worked with both Class-II and Class-III clients. Effects of switching from Class-II to Class-III Gaming are summarized in the following paragraphs¹².

One tribe reported to ECONorthwest that they mix Class-II machines between Class-III slots so that the bingo machines (Class-II) would make more money. Otherwise, Class-II machines were played so little that the area of the casino where they were looked deserted. Even with mixing in, activity on the Class-II units was one-third of the activity on the Class-III slot machines.

Class-II machines simply are not as popular as Class-III slots. On average they earn about 62 percent of a slot machine in the same casino under typical conditions, but this can vary greatly depending on local conditions, the play characteristics of the machines, and how the casino functions. Furthermore, because they often have higher hold rates¹³, when adjusted for this, the usage rate of Class-II machines is about half of slots. Usage rate is the percent of machines in play at any given moment. It is this statistic, not gaming revenues or positions, that is most correlated with casino attendance and, indirectly, traffic.

In markets like Casino San Pablo, where there are no competing Class-III machines around, the Class-II bingo games prove to be very popular. They are the only game in town. Recent information suggests that the Lytton Band is earning over \$410 a day on each machine and that they are being played more than nine hours a day. That play rate suggests that during normal weekly peaks the machines are pushing the limits of their capacity. Perhaps more startling, this success has come about with very little marketing or promotion.

If Casino San Pablo replaced the bingo machines with Class-III machines, the turnover rate would be slightly faster because the machines have a faster play cycle¹⁴. The analysis assumes it would be 1.25 hours of machine play per visit on 1,020 machines. Player interest would be at least double, but capacity would limit activity. In an extremely crowded casino, machines are used 11.5 hours a day. Given another 15 percent for table game and non-gaming visitors, and 520 employees, and the casino would have about 3.9 million people coming to it every year or 338,000 a month.

In total, Casino San Pablo would see about a 51 percent increase in visits from players, employees, and non-gaming patrons. The change would be about 114,000 more visits per month. Many of those visits would be from people already on the road and just pulling into the casino or making a side trip to it while on the way to another destination.

¹² Please see Appendix of the complete reports provided by ECONorthwest.

¹³ The share of every dollar played that a player can expect to lose.

¹⁴ Play cycle is the time between game outcomes (or spins) on a slot machine. For Class-II machines, because players are betting against one another, there are delays in game outcomes. Some machines, like those currently at the San Pablo, require players to press buttons two or three times to determine outcomes. Regular Class-III slots need only one button press. Therefore, Class-III machines are faster, simpler to play, and more lucrative for the casinos. Player turnover is greater at Class-III casinos, so they tend to cater to more players per day.

Casino Trip Generation from San Jose Area

Data from the Bureau of Economic Analysis show that total personal income in the San Francisco-Oakland-Fremont MSA was \$216 billion in 2005¹⁵. Payrolls, through the third quarter of 2006, which track personal income growth closely, were up 6.5 percent annually¹⁶. This economic data suggests strong and rising demand for casino gaming in the Contra Costa County region and this demand is not being sufficiently satisfied locally.

The economic data for the MSA does not capture what is happening in San José because it is outside the San Francisco-Oakland-Fremont metropolitan statistical area. The definitions of MSAs come from the Federal Office of Management and Budget and are used for federal statistical purposes. Thus, key economic data such as personal income, employment, and consumer spending are reported at the MSA level.

Santa Clara is in the San José-Sunnyvale-Santa Clara MSA, which encompasses both Santa Clara and San Benito counties. Data on that MSA are available, but many statistics for the component counties of MSAs are not reported on a timely basis. Thus, the analysis cannot readily estimate the current gaming market potential of Santa Clara County or San José. While comparable overall economic data are not available, the analysis was able to forecast gaming visitors and employees by zip code from Santa Clara County using the same model and two scenarios provided in the January 15, 2007 memo.

A Class-III San Pablo Casino (Scenario B) with no nearby competitors would attract just over 1.5 million patrons a year from Santa Clara County (which is about 14% of the total patrons) including 755,763 which would come from San José zip codes. Overall, 838,536 vehicles (from Santa Clara County) would visit the casino in 2001¹⁷.

CCTA Modeling

The effects of the future cumulative conditions were based on traffic forecasts produced by the Contra Costa County Transportation Authority's Travel Demand Model for year 2030¹⁸. The 2030 land-use forecasts were based on the data from the Association of Bay Area Governments (ABAG) Projections 2003 land use data. These projections included an increase of 21,047 households and 35,130 employees in western Contra Costa County from 2000 to 2030. These increases were included in the baseline conditions for the analysis of cumulative conditions. The forecasts were developed using the TransCAD Model, version 4.8.

Weekend traffic forecasts were based on a ratio of average weekday peak-hour counts to a weekend traffic count at the same location. To assess overall impacts, each project's trips were added to the long-term modeled turning movement counts at each analysis intersection.

¹⁵ From BEA website accessed April 25, 2007 at www.bea.gov/newsreleases/regional/mpi/mpi_newsrelease.htm

¹⁶ From the Bureau of Labor Statistics website, April 25, 2007 at <http://www.bls.gov/cew/home.htm>

¹⁷ Patron average 1.81 people per vehicle.

¹⁸ Contra Costa County Transportation Authority has adopted TransCAD as its countywide travel demand model.

CASINO TRIP DISTRIBUTION

The trip distribution for the casinos in this study was estimated based on the results of the casino market model developed by ECONorthwest. Trips from each zip code in the MSA were aggregated and assigned to a gateway based on their likely access route to and from the casinos. The casino trip distributions of Casino San Pablo, Sugar Bowl Casino and Point Molate Casino are summarized in table below.

Gateway	Scenario A	Scenario B	Scenario C
I-580 E / US-101 N	1.7%	2.1%	1.7%
I-580 E / US-101 S	2.8%	2.9%	2.7%
I-80 E	78.7%	79.6%	79.4%
I-80 W	1.8%	1.8%	1.7%
San Pablo Dam Rd	1.7%	1.6%	1.6%
SR 123 N	2.6%	2.3%	2.0%
SR 123 S	2.7%	2.0%	1.7%
SR 4	8.0%	7.8%	9.3%
Total	100%	100%	100%

Exhibit 15: Trip Distribution of Casino San Pablo

Gateway	Scenario A	Scenario B	Scenario C
I-580 E / US-101 N	7.1%	7.0%	7.2%
I-580 E / US-101 S	4.6%	4.1%	4.7%
I-80 E	72.4%	73.4%	78.1%
I-80 W	2.2%	2.0%	2.2%
San Pablo Dam Rd	0.0%	0.0%	0.0%
SR 123 N	2.7%	1.8%	0.0%
SR 123 S	2.3%	1.5%	1.8%
SR 4	8.7%	10.2%	6.0%
Total	100%	100%	100%

Exhibit 16: Trip Distribution of Sugar Bowl and Point Molate Casinos

TRAFFIC IMPACT ANALYSIS

The impact analysis covered intersection operations, freeway and ramp operations. The traffic impacts at key intersections were assessed for the following conditions:

- Existing Conditions
- Near-Term 2011 Cumulative with Proposed Project Conditions
- Long-term 2030 Cumulative with Proposed Project Conditions

Significance Criteria

The significance criteria applied for the analysis is consistent with that established by the Contra Costa Transportation Authority (CCTA), West Contra Costa Transportation Advisory Committee (WCCTAC) and the City of Richmond.

Intersection Operations

For key intersections on the Routes of Regional Significance, the project impacts were assessed compared to the traffic service objectives on the West Contra Costa County Action Plan 2000 Update, July 2000. The project impacts at key intersections were considered significant if the project would:

- Cause the existing or cumulative LOS to degrade to worse than LOS E (i.e., LOS F) at a signalized intersection along San Pablo Avenue.
- Cause the existing or cumulative LOS to degrade to worse than LOS D (i.e., LOS E or LOS F) at a signalized intersection along Cutting Boulevard, Central Avenue, Carlson Blvd., 23rd Street, El Portal Drive, and Richmond Parkway.

For the remaining key intersections on non-regional routes, the project impacts were assessed compared to the level of service standards established in the Measure C legislation for signalized intersections in urban areas. The project impacts at key intersections were considered significant if the project would:

- Cause the existing or cumulative LOS to degrade to worse than LOS (high) D (i.e. LOS E or F) and V/C ratio to exceed 0.89.

Freeway Operations

Based on the West County Action Plan 2000 Update, the goal is to maintain LOS “E” of the freeway I-80 on all segments of this route during non-peak hours only¹⁹. The project impacts at the I-80 freeway were considered significant if the project would cause the existing or cumulative LOS to degrade to worse than LOS E (i.e., LOS F) during non peak hours.

¹⁹ “Non-peak hours” refers to all hours except Monday thru Friday from 6 a.m. to 9 a.m. and from 3 p.m. to 7 p.m.

Arterial Operations

Based on the West County Action Plan 2000 Update, the goal of arterial operations is to maintain LOS “E” or better on all roadway segments of SR 4, San Pablo Avenue, San Pablo Dam Road, Appian Way. Thus, the project impacts at arterial roadways were considered significant if the project would cause the existing or cumulative LOS to degrade to worse than LOS E (i.e., LOS F) during non peak hours.

Site Access

The project impacts were considered significant if the project would:

Substantially increase traffic hazards to motor vehicles, bicycles, or pedestrians due to a design feature (e.g., sharp curves or dangerous intersections) that does not comply with Caltrans design standards or incompatible uses (e.g., farm equipment).

Levels of Service

The level of service (LOS) is a qualitative assessment of the motorists and passengers’ perceptions of traffic conditions. The LOS is generally described in terms of travel time and speed, freedom to maneuver, traffic interruptions, comfort and convenience. The LOS applies quantifiable traffic measures such as average speed, intersection delays, and volume-to-capacity ratios to approximate driver satisfaction. These measures differ by roadway type because the user’s perceptions and expectations vary by roadway type.

Individual levels of service are designated by letters “A” for most favorable to “F” for least favorable with each representing a range of conditions. LOS C represents traffic conditions on urban streets where the speeds drop to about half and maneuverability begins to be restricted due to increased traffic volumes and intersection delays become noticeable. LOS D can be described as conditions where increased traffic affects maneuverability, causes speeds drop well below the speed limit, and results in long delays at some intersections. LOS E, which is generally the limit of acceptable delay, would occur with excessive delays at some intersections causing traffic to back up into the adjacent intersection.

For the signalized intersection analysis, the CCTALOS methodology was used, which applies a modified Circular 212 analysis methodology. The intersection level of service was determined based on the critical volume-to-capacity ratio (V/C) and assigned a level of service grade based on the ranges shown in Exhibit 17.

Level of Service	Sum of Critical V/C
A	≤ 0.60
B	0.61 – 0.70
C	0.71 – 0.80
D	0.81 – 0.90
E	0.91 – 1.00
F	> 1.00

Source: Contra Costa Transportation Authority, Technical Procedures, September 1997.

Exhibit 17: Level of Service Range

Freeways

Freeway segments and freeway merge and diverge areas were evaluated. For freeway segments, Highway Capacity Manual (HCM) procedures were used to calculate average daily capacities for each LOS threshold from A to F. The LOS was determined using the volume-to-capacity ratio (v/c) given an estimated free-flow speed at 70 miles per hour for all the highway/freeway segments, which is the base free-flow speed for urban areas from the HCM. The volume-to-capacity ratio is the ratio of flow rate to capacity for a transportation facility. Exhibit 18 contains the volume-to-capacity ratio thresholds.

<i>Level of Service</i>	<i>Maximum V/C</i>
A	0.32
B	0.53
C	0.74
D	0.90
E	1.00

Source: Highway Capacity Manual 2000, 23-4.

Exhibit 18: LOS and Volume-to-Capacity ratio for Free-Flow Speed at 70 mi/h

For freeway merge and diverge areas, HCM procedures were used to calculate the density²⁰ for each LOS threshold from A to F. First, the peak-hour demand flow rate immediately upstream of merge influence area or at the beginning of the deceleration lane at diverge was calculated. In addition, several capacity values were computed to determine the critical capacity. The determining capacities are: 1) maximum total flow approaching a major diverge area on the freeway, 2) maximum total vehicle flow departing from a merge or diverge area on the freeway, 3) maximum total flow entering the ramp influence area, and 4) maximum flow on a ramp. When demand flow is greater than the critical capacity, the LOS would be F. Otherwise, given a length of the acceleration lane or deceleration lane, the LOS was determined using the density of flow within the ramp influence area according to HCM procedures. Exhibit 19 contains the LOS and density thresholds for merge and diverge areas.

<i>Level of Service</i>	<i>Density (pc/mi/ln)</i>
A	≤ 10
B	> 10-20
C	> 20-28
D	> 28-35
E	> 35
F	Demand exceeds capacity

Source: Highway Capacity Manual 2000, page 25-4.

Exhibit 19: LOS and Density thresholds for Merge and Diverge areas

²⁰ Density is the number of vehicles on a roadway segment averaged over space, usually expressed as vehicles per mile or vehicles per mile per lane.

Roadway Segments

Levels of service for roadway links were estimated using a planning methodology based on the Highway Capacity Manual (HCM). This methodology uses daily traffic volumes to determine levels of service for general planning applications as shown in Exhibit 20. The capacity of a roadway is based on the number of signalized intersections per mile, number of lanes, presence of left-turn lanes and medians, and other factors from the HCM method.

Class I (>0.00 to 1.99 signalized intersections per mile)						
<i>Lanes</i>	<i>Divided</i>	<i>Level of Service</i>				
		A	B	C	D	E
2	Undivided	**	4,200	13,800	16,400	16,900
4	Divided	4,800	29,300	34,700	35,700	***
6	Divided	7,300	44,700	52,100	53,500	***
8	Divided	9,400	58,000	66,100	67,800	***
Class II (2.00 to 4.50 signalized intersections per mile)						
<i>Lanes</i>	<i>Divided</i>	<i>Level of Service</i>				
		A	B	C	D	E
2	Undivided	**	1,900	11,200	15,400	16,300
4	Divided	**	4,100	26,000	32,700	34,500
6	Divided	**	6,500	40,300	49,200	51,800
8	Divided	**	8,500	53,300	63,800	67,000
Class III (more than 4.5 signalized intersections per mile and not within primary City central business district)						
<i>Lanes</i>	<i>Divided</i>	<i>Level of Service</i>				
		A	B	C	D	E
2	Undivided	**	**	5,300	12,600	15,500
4	Divided	**	**	12,400	28,900	32,800
6	Divided	**	**	19,500	44,700	49,300
8	Divided	**	**	25,800	58,700	63,800
Class IV (more than 4.5 signalized intersections per mile and within primary City central business district)						
<i>Lanes</i>	<i>Divided</i>	<i>Level of Service</i>				
		A	B	C	D	E
2	Undivided	**	**	5,200	13,700	15,000
4	Divided	**	**	12,300	30,300	31,700
6	Divided	**	**	19,100	45,800	47,600
8	Divided	**	**	25,900	59,900	62,200

Source: <http://www.dot.state.fl.us/planning/systems/sm/los/pdfs/QLOStables2002.pdf>.

Exhibit 20: Annual Average Daily Volumes for Service Levels on Roadway Segments

Regional Roadway Access

Freeway System

Regional vehicular access to the three project sites is provided primarily by the freeway system that serves Western Contra Costa County.

Interstate 80 (Eastshore Freeway), an east-west facility that runs in a north-south direction through the study area, is located 0.25 miles east of Casino San Pablo and 4 miles northeast of the proposed Sugar Bowl Casino. Interstate 80 serves as the major freeway link between San Francisco Bay Area and Sacramento.

Interstate 580 is an east-west roadway facility located 3 miles south of the proposed site for Sugar Bowl Casino and 2 miles south of the proposed Point Molate Casino/Resort. I-580 leads to the Richmond-San Rafael Bridge and ends to the west at U.S. 101 in San Rafael, Marin County.

Roadway System

San Pablo Avenue, a four-lane arterial, lies adjacent to the Casino San Pablo. It serves as a major north-south arterial that runs from 17th Street in Oakland north to Hercules. It is one of the major corridors in the Bay Area. It has two traffic lanes in each direction and connects five major cities (Hercules, Pinole, San Pablo, Richmond and El Cerrito) in West Contra Costa County. San Pablo Avenue is a major alternative route to Interstate 80.

San Pablo Dam Road, a four-lane arterial, is an east-west roadway that runs through El Sobrante and ends in the city of San Pablo. San Pablo Dam Road serves as a regional arterial as well as El Sobrante's "Main Street" with commercial districts along the roadway.

Richmond Parkway, a four- or six-lane landscaped expressway, provides a link between the northern edge (Interstate 80 at Hilltop) and the southwest corner (the I-580 freeway and the Richmond-San Rafael Bridge) of the city of Richmond. Sugar Bowl Casino is located at the intersection of Richmond Parkway and Parr Boulevard.

Parr Boulevard, a two-lane east-west arterial roadway, connects to Giant Highway on the east, extends across Richmond Parkway and past Garden Tract Road on the west, and ends at the West Contra Costa Sanitary Landfill (WCCSL) site. All vehicle access to the WCCSL is from Parr Boulevard.

Rumrill Boulevard, a four-lane north-south arterial roadway along the western border of the city of San Pablo, extends south from San Pablo Avenue (intersects with Broadway and El Portal Drive) and becomes 13th Street. It connects Interstate 580 via Harbour Way and Pennsylvania Avenue.

23rd Street, a four-lane north-south arterial roadway in Richmond and San Pablo, connects San Pablo Avenue in the north and Interstate 580 in the south where it becomes Marina Bay Parkway.

El Portal Drive, a four-lane east-west arterial roadway, connects San Pablo Dam Road, Interstate 80 and San Pablo Avenue.

Exhibit 21 shows the regional access to study area.



Exhibit 21: Regional Access to Study Area

Summary of Intersection Levels of Service

Intersection	LOS with E or F	E	F	Total Count
AM Peak Hour	Existing	0	1	1
	2011 Scenario A	1	1	2
	2011 Scenario B	1	1	2
	2011 Scenario C	1	1	2
	2030 Scenario A	8	7	15
	2030 Scenario B	5	7	12
	2030 Scenario C	7	9	16
PM Peak Hour	Existing	2	1	3
	2011 Scenario A	6	3	9
	2011 Scenario B	3	4	7
	2011 Scenario C	3	7	9
	2030 Scenario A	3	14	17
	2030 Scenario B	3	12	15
	2030 Scenario C	3	15	18
Saturday Peak Hour	Existing	1	1	2
	2011 Scenario A	3	3	6
	2011 Scenario B	1	5	6
	2011 Scenario C	1	6	7
	2030 Scenario A	3	11	14
	2030 Scenario B	4	9	13
	2030 Scenario C	3	12	15

Exhibit 22: Intersection Levels of Service with E or F

Evaluation of Arterial Levels of Service

Arterial levels of service were evaluated based on the methodology in the 2000 Highway Capacity Manual. The northbound and southbound movements of San Pablo Avenue were evaluated from 23rd Street to Barrett Avenue. Exhibit 23 shows the intersections included in the arterial evaluation.

	Street Name
1	23rd St
2	Church Ln
3	Vale Rd
4	San Pablo Dam Rd
5	Rheem Ave
6	McBryde Ave
7	Garvin Ave
8	Solano Ave
9	Roosevelt Ave
10	Barrett Ave

Exhibit 23: Locations of Arterial Level of Service

EXISTING 2005 CONDITIONS

Intersection Level of Service

For signalized intersections, intersection levels of service were evaluated based on CCTA method (Volume Capacity ratio) and TRAFFIX software was used to produce all levels of service. For unsignalized intersections, the delay was evaluated based on the Highway Capacity Manual methods: 2-way stop intersections (worst movement's delay) and all-way stop intersections (the intersection average delay).

	Intersection	Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
			LOS	V/C *	LOS	V/C *	LOS	V/C *
1	San Pablo Ave/San Pablo Dam Rd	Signal	A	0.486	B	0.627	A	0.533
2	Contra Costa Ave/San Pablo Dam	Signal	A	0.246	A	0.307	N/A	N/A
3	Ventura Ave/San Pablo Dam Rd	Signal	A	0.248	B	0.671	N/A	N/A
4	I-80 WB Ramp/San Pablo Dam Rd	Signal	B	0.640	A	0.408	C	0.756
5	I-80 EB Ramp/San Pablo Dam Rd	Signal	B	0.651	B	0.672	D	0.849
6	San Pablo Ave/Rheem Ave	Signal	A	0.457	A	0.396	N/A	N/A
7	San Pablo Ave/Vale Rd	Signal	A	0.451	A	0.434	A	0.390
8	San Pablo Ave/Church Ln	Signal	A	0.572	B	0.673	C	0.708
9	San Pablo Ave/23rd St	Signal	C	0.712	A	0.578	B	0.687
10	San Pablo Ave/McBryde Ave	Signal	A	0.434	A	0.492	A	0.405
11	San Pablo Ave/Roosevelt Ave	Signal	A	0.361	A	0.596	B	0.655
12	San Pablo Ave/Barrett Ave	Signal	B	0.638	E	0.995	C	0.735
13	Swans Way/Barrett Ave	Signal	C	0.706	C	0.752	A	0.546
14	Church Ln/EI Portal Dr	Signal	A	0.572	A	0.503	A	0.530
15	I-80 WB OnRamp/EI Portal Dr	2-Way Stop	D	30.2	B	14.4	B	12.1
16	EI Portal Dr/San Pablo Dam Rd	Signal	C	0.730	B	0.683	C	0.789
17	I-80 EB Ramp/EI Portal Dr	Signal	C	0.762	D	0.869	C	0.768
18	I-80 WB Off Ramp/EI Portal Dr	Signal	D	0.801	D	0.830	C	0.714
19	Appian Wy/San Pablo Dam Rd	Signal	C	0.713	A	0.518	A	0.464
20	23rd St/Rheem Ave	Signal	A	0.480	A	0.584	E	0.951
21	29th St/Rheem Ave	All-Way Stop	B	11.2	B	11.4	N/A	N/A
22	Rumrill Dr/Brookside Dr	Signal	A	0.387	A	0.372	A	0.267
23	Richmond Parkway/Parr Blvd	Signal	B	0.655	C	0.750	A	0.237
24	Western Dr/I-580 Ramp	2-Way Stop	A	9.2	A	9.1	A	9.2
25	Castro St/I-580 WB Ramp	Signal	B	0.663	B	0.650	A	0.348
26	San Pablo Ave/Solano Ave	Signal	A	0.472	A	0.409	N/A	N/A
27	S 23rd St/I-580 WB Ramp	Signal	A	0.365	A	0.338	A	0.222
28	Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.233	A	0.371	A	0.171
29	San Pablo Ave/Garvin Ave	Signal	A	0.390	A	0.411	N/A	N/A
30	San Pablo Ave/Robert Miller Dr	Signal	A	0.387	B	0.627	N/A	N/A
31	San Pablo Ave/Richmond Parkway	Signal	B	0.670	C	0.762	A	0.470
32	San Pablo Ave/Rumrill Blvd	Signal	A	0.504	A	0.555	N/A	N/A
33	San Pablo Ave/Appian Wy	Signal	A	0.531	B	0.617	N/A	N/A
34	San Pablo Ave/Pinole Valley Rd	Signal	C	0.758	B	0.661	N/A	N/A
35	San Pablo Ave/Sycamore Ave	Signal	B	0.609	A	0.586	N/A	N/A
36	23rd St/Market Ave	Signal	A	0.551	D	0.895	N/A	N/A
37	101 SB Ramp/Sir Francis Drake	Signal	A	0.373	A	0.339	A	0.281
38	101 NB Ramp/Sir Francis Drake	Signal	C	0.758	E	0.910	C	0.779
39	Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40	Irwin St/Third St	Signal	B	0.601	B	0.621	A	0.557
41	Hetheron St/Third St	Signal	A	0.443	A	0.559	A	0.496
42	Tamalpais Ave/Third St	Signal	A	0.574	A	0.580	A	0.455
43	I-80 NB Ramp/Buchanan St	Signal	B	0.658	C	0.795	D	0.876
44	I-80 SB Ramp/Buchanan St	Signal	B	0.686	A	0.395	A	0.550
45	San Pablo Ave/John Muir Pkwy	Signal	A	0.504	A	0.594	A	0.307
46	San Pablo Ave/Hercules Ave	Signal	A	0.572	A	0.513	A	0.497

Exhibit 24: Existing Intersection Level of Service

Freeway and Ramp Level of Service

Freeway and ramp evaluation was based on the methodology in the 2000 Highway Capacity Manual. Highway Capacity Software (HCS 5.2) was used to generate all levels of service of freeway mainlines and ramp junctions analysis. Exhibit 25 shows levels of service of existing freeway mainlines and ramp junctions operations.

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	C	20.4	D	31.9	D	34.0
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	C	21.7	D	32.6	E	36.2
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	23.8	D	28.3	C	24.4
	I-80 n/o San Pablo Dam Road	Freeway Mainline	C	22.0	E	37.2	D	33.2
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	D	34.3	C	20.8	C	25.9
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	E	37.5	C	24.8	D	30.1
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	27.9	C	24.5	D	28.8
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	36.9	C	21.4	D	26.6

Exhibit 25: Existing Freeway and Ramp Level of Service

Existing Arterial Level of Service

Arterial Level of Service on San Pablo Ave	Northbound	Southbound
AM Peak Hour	D	D
PM Peak Hour	D	D
Saturday Peak Hour	C	D

Exhibit 26: Existing Arterial Level of Service

NEAR-TERM 2011 TRAFFIC IMPACTS

The population growth rate from 2005 to 2010 was about 1.103% annually published by the Association of Bay Area Governments in 2007 (Exhibit 27). The background traffic volumes in 2011 were derived from the existing traffic counts (multiplied by a compound factor, 1.103% for 6 years – a total increase of 6.8%). Based on ECONorthwest’s surveys of local casinos in Oregon, the detailed hourly casino trip data were used to estimate hourly forecasts and to determine directional weekday AM peak hour, weekday PM peak hour, and Saturday peak hour trip generation for the proposed projects.

Year	2005	2010	Growth Rate from 2005 to 2010
Population	7,096,100	7,496,100	1.103%

Exhibit 27: Population Growth from 2005 to 2010

Exhibit 28 shows the casino trip generation of three project scenarios. Internal trip capture was applied to Point Molate casino due to the multiple land uses of the proposed project. *An internal capture rate can generally be defined as a percentage reduction that can be applied to the trip generation estimates for individual land uses to account for trips internal to the site²¹.* Based on ITE’s guideline, there is no internal capture rate of casino type of land uses. However, ITE has an internal capture rate, 20% of retail types of land uses. Thus, 20% was used to estimate the internal capture rate of the shopping center in the Point Molate casino.

		AM Peak Hour			PM Peak Hour			Saturday Peak Hour		
		Total	In	Out	Total	In	Out	Total	In	Out
Scenario A										
San Pablo	Total	493	383	110	1,211	600	611	1,449	755	694
	Pass-by	197	153	44	484	240	244	580	302	278
	External	296	230	66	727	360	367	869	453	416
Sugar Bowl	Total	772	599	173	1,897	940	957	2,270	1,183	1,087
	Pass-by	77	60	17	190	94	96	227	118	109
	External	695	539	156	1,707	846	861	2,043	1,065	978
Total External		991	769	222	2,434	1,206	1,228	2,912	1,518	1,394
Scenario B										
San Pablo	Total	866	672	194	2,128	1,055	1,073	2,546	1,327	1,219
	Pass-by	346	269	78	851	422	429	1,018	531	488
	External	520	403	116	1,277	633	644	1,528	796	731
Scenario C										
San Pablo	Total	829	644	185	2,038	1,010	1,028	2,438	1,271	1,167
	Pass-by	332	258	74	815	404	411	975	508	467
	External	497	386	111	1,223	606	617	1,463	763	700
Sugar Bowl	Total	672	522	150	1,652	819	833	1,976	1,030	946
	Pass-by	67	52	15	165	82	83	198	103	95
	External	605	470	135	1,487	737	750	1,778	927	851
Point Molate	Total	1,345	943	402	4,368	2,149	2,219	5,381	2,779	2,602
	Internal	160	80	80	842	421	421	1,512	504	1,008
	External	1,185	863	322	3,526	1,728	1,798	4,550	2,275	2,275
	Pass-by	78	62	15	691	337	354	970	504	466
	Net External	1,107	801	306	2,835	1,391	1,444	3,403	1,771	1,632
Total External		2,209	1,657	552	5,545	2,734	2,811	6,644	3,461	3,183

Exhibit 28: Casino Trip Generation of Near-Term 2011

²¹ ITE Trip Generation Handbook, 2nd Edition, Chapter 7.

2011 Scenario A – San Pablo (II) and Sugar Bowl Casinos Intersection LOS

	Intersection	Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
			LOS	V/C *	LOS	V/C *	LOS	V/C *
1	San Pablo Ave/San Pablo Dam Rd	Signal	A	0.526	E	0.957	E	0.912
2	Contra Costa Ave/San Pablo Dam	Signal	A	0.323	A	0.424	N/A	N/A
3	Ventura Ave/San Pablo Dam Rd	Signal	A	0.325	D	0.812	N/A	N/A
4	I-80 WB Ramp/San Pablo Dam Rd	Signal	B	0.696	A	0.484	E	0.939
5	I-80 EB Ramp/San Pablo Dam Rd	Signal	D	0.805	E	0.905	F	1.140
6	San Pablo Ave/Rheem Ave	Signal	A	0.495	A	0.441	N/A	N/A
7	San Pablo Ave/Vale Rd	Signal	A	0.485	A	0.477	A	0.435
8	San Pablo Ave/Church Ln	Signal	B	0.614	C	0.725	C	0.764
9	San Pablo Ave/23rd St	Signal	C	0.778	B	0.645	C	0.773
10	San Pablo Ave/McBryde Ave	Signal	A	0.466	A	0.536	A	0.444
11	San Pablo Ave/Roosevelt Ave	Signal	A	0.390	B	0.643	C	0.712
12	San Pablo Ave/Barrett Ave	Signal	B	0.694	F	1.082	D	0.809
13	Swans Way/Barrett Ave	Signal	C	0.754	D	0.803	A	0.583
14	Church Ln/EI Portal Dr	Signal	B	0.612	A	0.543	A	0.572
15	I-80 WB OnRamp/EI Portal Dr	2-Way Stop	E	46.6	C	16.2	B	13.100
16	EI Portal Dr/San Pablo Dam Rd	Signal	C	0.781	C	0.731	D	0.845
17	I-80 EB Ramp/EI Portal Dr	Signal	D	0.815	E	0.940	D	0.833
18	I-80 WB Off Ramp/EI Portal Dr	Signal	D	0.863	D	0.898	C	0.789
19	Appian Wy/San Pablo Dam Rd	Signal	C	0.762	A	0.555	A	0.498
20	23rd St/Rheem Ave	Signal	A	0.515	B	0.650	F	1.026
21	29th St/Rheem Ave	All-Way Stop	B	12.2	B	13.1	N/A	N/A
22	Rumrill Dr/Brookside Dr	Signal	A	0.434	A	0.433	A	0.335
23	Richmond Parkway/Parr Blvd	Signal	C	0.779	F	1.285	D	0.807
24	Western Dr/I-580 Ramp	2-Way Stop	A	9.2	A	9.1	A	9.2
25	Castro St/I-580 WB Ramp	Signal	C	0.728	E	0.905	A	0.554
26	San Pablo Ave/Solano Ave	Signal	A	0.506	A	0.446	A	0.012
27	S 23rd St/I-580 WB Ramp	Signal	A	0.390	A	0.364	N/A	N/A
28	Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.254	A	0.406	A	0.194
29	San Pablo Ave/Garvin Ave	Signal	A	0.418	A	0.447	N/A	N/A
30	San Pablo Ave/Robert Miller Dr	Signal	A	0.415	B	0.678	N/A	N/A
31	San Pablo Ave/Richmond Parkway	Signal	C	0.725	D	0.838	A	0.531
32	San Pablo Ave/Rumrill Blvd	Signal	A	0.545	B	0.602	N/A	N/A
33	San Pablo Ave/Appian Wy	Signal	A	0.570	B	0.676	N/A	N/A
34	San Pablo Ave/Pinole Valley Rd	Signal	D	0.820	C	0.722	N/A	N/A
35	San Pablo Ave/Sycamore Ave	Signal	B	0.656	B	0.635	N/A	N/A
36	23rd St/Market Ave	Signal	A	0.589	E	0.956	N/A	N/A
37	101 SB Ramp/Sir Francis Drake	Signal	A	0.400	A	0.375	A	0.315
38	101 NB Ramp/Sir Francis Drake	Signal	D	0.810	E	0.992	D	0.854
39	Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40	Irwin St/Third St	Signal	B	0.642	B	0.663	A	0.595
41	Hetheron St/Third St	Signal	A	0.473	A	0.597	A	0.529
42	Tamalpais Ave/Third St	Signal	B	0.613	B	0.619	A	0.486
43	I-80 NB Ramp/Buchanan St	Signal	C	0.703	D	0.849	E	0.935
44	I-80 SB Ramp/Buchanan St	Signal	C	0.733	A	0.422	A	0.587
45	San Pablo Ave/John Muir Pkwy	Signal	A	0.544	B	0.644	A	0.339
46	San Pablo Ave/Hercules Ave	Signal	B	0.611	A	0.557	A	0.563

Exhibit 29: 2011 Scenario A - Intersection Level of Service²²

²² Unsignalized intersections were reported delay in seconds based on the Highway Capacity Manual methods.

2011 Scenario B – San Pablo (III) Intersection LOS

Intersection	Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
		LOS	V/C *	LOS	V/C *	LOS	V/C *
1 San Pablo Ave/San Pablo Dam Rd	Signal	A	0.575	F	1.164	F	1.163
2 Contra Costa Ave/San Pablo Dam	Signal	A	0.369	A	0.497	N/A	N/A
3 Ventura Ave/San Pablo Dam Rd	Signal	A	0.371	D	0.886	N/A	N/A
4 I-80 WB Ramp/San Pablo Dam Rd	Signal	C	0.706	A	0.565	F	1.039
5 I-80 EB Ramp/San Pablo Dam Rd	Signal	D	0.889	F	1.049	F	1.319
6 San Pablo Ave/Rheem Ave	Signal	A	0.502	A	0.445	N/A	N/A
7 San Pablo Ave/Vale Rd	Signal	A	0.486	A	0.497	A	0.476
8 San Pablo Ave/Church Ln	Signal	B	0.615	C	0.727	C	0.766
9 San Pablo Ave/23rd St	Signal	C	0.760	B	0.622	C	0.734
10 San Pablo Ave/McBryde Ave	Signal	A	0.465	A	0.530	A	0.438
11 San Pablo Ave/Roosevelt Ave	Signal	A	0.387	B	0.640	C	0.705
12 San Pablo Ave/Barrett Ave	Signal	B	0.686	F	1.072	C	0.795
13 Swans Way/Barrett Ave	Signal	C	0.754	D	0.803	A	0.583
14 Church Ln/EI Portal Dr	Signal	B	0.611	A	0.538	A	0.566
15 I-80 WB OnRamp/EI Portal Dr	2-Way Stop	E	46.1	C	15.9	B	12.9
16 EI Portal Dr/San Pablo Dam Rd	Signal	C	0.781	C	0.732	D	0.847
17 I-80 EB Ramp/EI Portal Dr	Signal	D	0.814	E	0.928	D	0.820
18 I-80 WB Off Ramp/EI Portal Dr	Signal	D	0.856	D	0.887	C	0.763
19 Appian Wy/San Pablo Dam Rd	Signal	C	0.763	A	0.556	A	0.499
20 23rd St/Rheem Ave	Signal	A	0.516	B	0.650	F	1.036
21 29th St/Rheem Ave	All-Way Stop	B	12.3	B	13.2	N/A	N/A
22 Rumrill Dr/Brookside Dr	Signal	A	0.413	A	0.397	A	0.286
23 Richmond Parkway/Parr Blvd	Signal	B	0.700	D	0.801	A	0.253
24 Western Dr/I-580 Ramp	2-Way Stop	A	9.2	A	9.1	A	9.2
25 Castro St/I-580 WB Ramp	Signal	C	0.708	B	0.694	A	0.372
26 San Pablo Ave/Solano Ave	Signal	A	0.505	A	0.441	N/A	N/A
27 S 23rd St/I-580 WB Ramp	Signal	A	0.391	A	0.367	A	0.245
28 Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.260	A	0.415	A	0.206
29 San Pablo Ave/Garvin Ave	Signal	A	0.418	A	0.443	N/A	N/A
30 San Pablo Ave/Robert Miller Dr	Signal	A	0.414	B	0.673	N/A	N/A
31 San Pablo Ave/Richmond Parkway	Signal	C	0.715	D	0.818	A	0.507
32 San Pablo Ave/Rumrill Blvd	Signal	A	0.541	A	0.597	N/A	N/A
33 San Pablo Ave/Appian Wy	Signal	A	0.569	B	0.666	N/A	N/A
34 San Pablo Ave/Pinole Valley Rd	Signal	D	0.813	C	0.713	N/A	N/A
35 San Pablo Ave/Sycamore Ave	Signal	B	0.652	B	0.630	N/A	N/A
36 23rd St/Market Ave	Signal	A	0.588	E	0.956	N/A	N/A
37 101 SB Ramp/Sir Francis Drake	Signal	A	0.398	A	0.364	A	0.303
38 101 NB Ramp/Sir Francis Drake	Signal	D	0.810	E	0.976	D	0.836
39 Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40 Irwin St/Third St	Signal	B	0.642	B	0.663	A	0.595
41 Hetheron St/Third St	Signal	A	0.473	A	0.597	A	0.529
42 Tamalpais Ave/Third St	Signal	B	0.613	B	0.619	A	0.486
43 I-80 NB Ramp/Buchanan St	Signal	C	0.703	D	0.849	E	0.935
44 I-80 SB Ramp/Buchanan St	Signal	C	0.733	A	0.422	A	0.587
45 San Pablo Ave/John Muir Pkwy	Signal	A	0.541	B	0.638	A	0.333
46 San Pablo Ave/Hercules Ave	Signal	B	0.611	A	0.552	A	0.545

Exhibit 30: 2011 Scenario B – Intersection Level of Service²³

²³ Unsignalized intersections were reported delay in seconds based on the Highway Capacity Manual methods.

2011 Scenario C– Three Casino Developments Intersection LOS

Intersection		Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
			LOS	V/C *	LOS	V/C *	LOS	V/C *
1	San Pablo Ave/San Pablo Dam Rd	Signal	A	0.573	F	1.151	F	1.147
2	Contra Costa Ave/San Pablo Dam	Signal	A	0.366	A	0.492	N/A	N/A
3	Ventura Ave/San Pablo Dam Rd	Signal	A	0.368	D	0.881	N/A	N/A
4	I-80 WB Ramp/San Pablo Dam Rd	Signal	C	0.707	A	0.561	F	1.036
5	I-80 EB Ramp/San Pablo Dam Rd	Signal	D	0.882	F	1.040	F	1.306
6	San Pablo Ave/Rheem Ave	Signal	A	0.499	A	0.445	N/A	N/A
7	San Pablo Ave/Vale Rd	Signal	A	0.486	A	0.492	A	0.472
8	San Pablo Ave/Church Ln	Signal	B	0.615	C	0.725	C	0.765
9	San Pablo Ave/23rd St	Signal	C	0.772	B	0.635	C	0.761
10	San Pablo Ave/McBryde Ave	Signal	A	0.466	A	0.533	A	0.442
11	San Pablo Ave/Roosevelt Ave	Signal	A	0.389	B	0.642	C	0.709
12	San Pablo Ave/Barrett Ave	Signal	B	0.691	F	1.078	D	0.804
13	Swans Way/Barrett Ave	Signal	C	0.754	D	0.803	A	0.583
14	Church Ln/EI Portal Dr	Signal	B	0.612	A	0.542	A	0.571
15	I-80 WB OnRamp/EI Portal Dr	2-Way Stop	E	46.6	C	16.1	B	13.0
16	EI Portal Dr/San Pablo Dam Rd	Signal	C	0.781	C	0.732	D	0.847
17	I-80 EB Ramp/EI Portal Dr	Signal	D	0.815	E	0.937	D	0.830
18	I-80 WB Off Ramp/EI Portal Dr	Signal	D	0.861	D	0.895	C	0.783
19	Appian Wy/San Pablo Dam Rd	Signal	C	0.763	A	0.556	A	0.499
20	23rd St/Rheem Ave	Signal	A	0.516	B	0.654	F	1.033
21	29th St/Rheem Ave	All-Way Stop	B	12.3	B	13.3	N/A	N/A
22	Rumrill Dr/Brookside Dr	Signal	A	0.427	A	0.420	A	0.317
23	Richmond Parkway/Parr Blvd	Signal	C	0.793	F	1.274	C	0.795
24	Western Dr/I-580 Ramp	2-Way Stop	C	19.8	F	205.9	F	432.7
25	Castro St/I-580 WB Ramp	Signal	C	0.726	E	0.924	A	0.570
26	San Pablo Ave/Solano Ave	Signal	A	0.505	A	0.444	N/A	N/A
27	S 23rd St/I-580 WB Ramp	Signal	A	0.391	A	0.366	A	0.243
28	Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.258	A	0.412	A	0.202
29	San Pablo Ave/Garvin Ave	Signal	A	0.418	A	0.445	N/A	N/A
30	San Pablo Ave/Robert Miller Dr	Signal	A	0.414	B	0.676	N/A	N/A
31	San Pablo Ave/Richmond Parkway	Signal	C	0.747	D	0.867	A	0.568
32	San Pablo Ave/Rumrill Blvd	Signal	A	0.543	A	0.599	N/A	N/A
33	San Pablo Ave/Appian Wy	Signal	A	0.573	B	0.686	N/A	N/A
34	San Pablo Ave/Pinole Valley Rd	Signal	D	0.825	C	0.731	N/A	N/A
35	San Pablo Ave/Sycamore Ave	Signal	B	0.658	B	0.641	N/A	N/A
36	23rd St/Market Ave	Signal	A	0.589	E	0.956	N/A	N/A
37	101 SB Ramp/Sir Francis Drake	Signal	A	0.404	A	0.394	A	0.336
38	101 NB Ramp/Sir Francis Drake	Signal	D	0.810	F	1.021	D	0.887
39	Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40	Irwin St/Third St	Signal	B	0.642	B	0.663	A	0.595
41	Hetheron St/Third St	Signal	A	0.473	A	0.597	A	0.529
42	Tamalpais Ave/Third St	Signal	B	0.613	B	0.619	A	0.486
43	I-80 NB Ramp/Buchanan St	Signal	C	0.703	D	0.849	E	0.935
44	I-80 SB Ramp/Buchanan St	Signal	C	0.733	A	0.422	A	0.587
45	San Pablo Ave/John Muir Pkwy	Signal	A	0.547	B	0.649	A	0.345
46	San Pablo Ave/Hercules Ave	Signal	B	0.611	A	0.562	A	0.582

Exhibit 31: 2011 Scenario C – Intersection Level of Service²⁴

²⁴ Unsignalized intersections were reported delay in seconds based on the Highway Capacity Manual methods.

Scenario A – Freeway and Ramp LOS

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	C	21.9	D	34.1	E	38.2
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	C	24.4	E	35.6	E	40.2
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	24.6	D	30.5	C	26.3
	I-80 n/o San Pablo Dam Road	Freeway Mainline	C	22.9	E	40.1	E	35.0
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	E	36.8	C	21.6	D	26.7
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	E	39.8	C	26.4	D	31.0
	On-Ramp from San Pablo Dam Road	Ramp Merge	D	28.6	C	27.6	D	31.8
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	37.7	C	23.2	D	28.9

Exhibit 32: 2011 Scenario A – Freeway and Ramp LOS

Scenario B – Freeway and Ramp LOS

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	C	22.6	E	36.1	E	41.3
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	C	25.7	E	37.8	E	42.9
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	24.7	D	30.8	C	26.6
	I-80 n/o San Pablo Dam Road	Freeway Mainline	C	22.9	E	40.4	E	35.3
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	E	36.9	C	21.8	D	26.8
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	E	39.9	C	26.6	D	31.4
	On-Ramp from San Pablo Dam Road	Ramp Merge	D	28.9	D	29.5	D	34.0
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	38.1	C	24.2	D	30.5

Exhibit 33: 2011 Scenario B – Freeway and Ramp LOS

Scenario C – Freeway and Ramp LOS

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	C	22.5	E	35.9	E	41.0
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	C	25.6	E	37.5	E	42.6
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	24.7	D	30.8	C	26.6
	I-80 n/o San Pablo Dam Road	Freeway Mainline	C	22.9	E	40.4	E	35.4
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	E	37.0	C	21.8	D	26.9
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	E	39.9	C	26.7	D	55.5
	On-Ramp from San Pablo Dam Road	Ramp Merge	D	28.9	D	29.3	D	33.7
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	38.1	C	24.1	D	30.4

Exhibit 34: 2011 Scenario C – Freeway and Ramp LOS

2011 Arterial Level of Service

Arterial Level of Service on San Pablo Ave		Northbound	Southbound
AM Peak Hour	2011 Scenario A	D	D
	2011 Scenario B	D	D
	2011 Scenario C	D	D
PM Peak Hour	2011 Scenario A	D	D
	2011 Scenario B	D	E
	2011 Scenario C	D	E
Saturday Peak Hour	2011 Scenario A	D	D
	2011 Scenario B	D	E
	2011 Scenario C	D	E

Exhibit 35: 2011 Arterial Level of Service

LONG-TERM 2030 TRAFFIC IMPACTS

The 2030 future background traffic volumes were based on the CCTA TransCAD model. Based on ECONorthwest's surveys, the majority of visitors in local casinos consists of the age groups from 45 years old to 74 years old. The growth rate is approximately 1.17 percent in the nine Bay Area counties of these age groups from 2010 to 2030. Thus, this growth rate was applied to ECONorthwest's 2011 casino trip generation to derive the casino trips of 2030.

Age	Population Projection		
	2000	2010	2030
45-49	509,959	568,800	489,700
50-54	454,679	530,800	470,800
55-59	325,669	463,900	533,200
60-64	245,426	400,800	550,800
65-69	202,876	275,200	546,000
70-74	186,561	198,000	484,600
	1,925,170	2,437,500	3,075,100

Exhibit 36: Bay Area Population Projections
Source: Association of Bay Area Governments

		AM Peak Hour			PM Peak Hour			Saturday Peak Hour		
		Total	In	Out	Total	In	Out	Total	In	Out
Scenario A										
San Pablo	Total	615	478	137	1,510	748	762	1,807	941	865
	Pass-by	246	191	55	604	299	304	723	377	347
	External	369	287	82	907	449	458	1,084	565	519
Sugar Bowl	Total	963	747	216	2,366	1,172	1,193	2,831	1,475	1,355
	Pass-by	96	75	21	237	117	120	283	147	136
	External	867	672	195	2,129	1,055	1,074	2,548	1,328	1,220
Total External		1,236	959	277	3,035	1,504	1,531	3,631	1,893	1,738
Scenario B										
San Pablo	Total	1,080	838	242	2,654	1,316	1,338	3,175	1,655	1,520
	Pass-by	431	335	97	1,061	526	535	1,269	662	609
	External	648	503	145	1,592	789	803	1,905	993	912
Scenario C										
San Pablo	Total	1,034	803	231	2,541	1,259	1,282	3,040	1,585	1,455
	Pass-by	414	322	92	1,016	504	513	1,216	633	582
	External	620	481	138	1,525	756	769	1,824	951	873
Sugar Bowl	Total	838	651	187	2,060	1,021	1,039	2,464	1,284	1,180
	Pass-by	84	65	19	206	102	104	247	128	118
	External	754	586	168	1,854	919	935	2,217	1,156	1,061
Point Molate	Total	1,677	1,176	501	5,447	2,680	2,767	6,710	3,466	3,245
	Internal	200	100	100	1,050	525	525	1,885	628	1,257
	External	1,478	1,076	401	4,397	2,155	2,242	5,674	2,837	2,837
	Pass-by	97	78	19	862	420	442	1,210	629	581
	Net External	1,381	999	382	3,535	1,735	1,800	4,244	2,208	2,035
Total External		2,755	2,066	689	6,914	3,409	3,505	8,285	4,316	3,969

Exhibit 37: Casino Trip Generation of Long-term 2030

2030 Scenario A – San Pablo (II) and Sugar Bowl Casinos Intersection LOS

Intersection		Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
			LOS	V/C *	LOS	V/C *	LOS	V/C *
1	San Pablo Ave/San Pablo Dam Rd	Signal	B	0.680	F	1.288	F	1.247
2	Contra Costa Ave/San Pablo Dam	Signal	A	0.421	A	0.558	N/A	N/A
3	Ventura Ave/San Pablo Dam Rd	Signal	A	0.424	F	1.043	N/A	N/A
4	I-80 WB Ramp/San Pablo Dam Rd	Signal	D	0.872	B	0.637	F	1.211
5	I-80 EB Ramp/San Pablo Dam Rd	Signal	F	1.038	F	1.187	F	1.493
6	San Pablo Ave/Rheem Ave	Signal	B	0.620	A	0.555	N/A	N/A
7	San Pablo Ave/Vale Rd	Signal	B	0.604	A	0.596	A	0.560
8	San Pablo Ave/Church Ln	Signal	C	0.767	E	0.912	E	0.955
9	San Pablo Ave/23rd St	Signal	E	0.976	D	0.814	E	0.976
10	San Pablo Ave/McBryde Ave	Signal	A	0.581	B	0.671	A	0.557
11	San Pablo Ave/Roosevelt Ave	Signal	A	0.487	D	0.804	D	0.891
12	San Pablo Ave/Barrett Ave	Signal	D	0.869	F	1.355	F	1.017
13	Swans Way/Barrett Ave	Signal	E	0.941	F	1.002	C	0.728
14	Church Ln/EI Portal Dr	Signal	C	0.763	B	0.679	C	0.716
15	I-80 WB OnRamp/EI Portal Dr	2-Way Stop	F	262.6	D	28.7	C	18.1
16	EI Portal Dr/San Pablo Dam Rd	Signal	E	0.974	E	0.912	F	1.055
17	I-80 EB Ramp/EI Portal Dr	Signal	F	1.018	F	1.176	F	1.043
18	I-80 WB Off Ramp/EI Portal Dr	Signal	F	1.078	F	1.122	E	0.991
19	Appian Wy/San Pablo Dam Rd	Signal	E	0.951	B	0.693	B	0.621
20	23rd St/Rheem Ave	Signal	B	0.642	D	0.819	F	1.283
21	29th St/Rheem Ave	All-Way Stop	C	17.5	C	22.4	N/A	N/A
22	Rumrill Dr/Brookside Dr	Signal	A	0.548	A	0.551	A	0.434
23	Richmond Parkway/Parr Blvd	Signal	E	0.996	F	1.751	F	1.178
24	Western Dr/I-580 Ramp	2-Way Stop	A	9.2	A	9.1	A	9.3
25	Castro St/I-580 WB Ramp	Signal	E	0.913	F	1.201	C	0.781
26	San Pablo Ave/Solano Ave	Signal	B	0.631	A	0.559	N/A	N/A
27	S 23rd St/I-580 WB Ramp	Signal	A	0.487	A	0.455	A	0.302
28	Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.319	A	0.509	A	0.246
29	San Pablo Ave/Garvin Ave	Signal	A	0.522	A	0.561	N/A	N/A
30	San Pablo Ave/Robert Miller Dr	Signal	A	0.518	D	0.848	N/A	N/A
31	San Pablo Ave/Richmond Parkway	Signal	E	0.906	F	1.052	B	0.671
32	San Pablo Ave/Rumrill Blvd	Signal	B	0.681	C	0.754	N/A	N/A
33	San Pablo Ave/Appian Wy	Signal	C	0.713	D	0.848	N/A	N/A
34	San Pablo Ave/Pinole Valley Rd	Signal	F	1.025	E	0.905	N/A	N/A
35	San Pablo Ave/Sycamore Ave	Signal	D	0.819	C	0.795	N/A	N/A
36	23rd St/Market Ave	Signal	C	0.735	F	1.192	N/A	N/A
37	101 SB Ramp/Sir Francis Drake	Signal	A	0.500	A	0.471	A	0.397
38	101 NB Ramp/Sir Francis Drake	Signal	F	1.010	F	1.243	F	1.072
39	Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40	Irwin St/Third St	Signal	D	0.801	D	0.827	C	0.742
41	Hetheron St/Third St	Signal	A	0.589	C	0.744	B	0.660
42	Tamalpais Ave/Third St	Signal	C	0.764	C	0.772	B	0.606
43	I-80 NB Ramp/Buchanan St	Signal	D	0.877	F	1.059	F	1.166
44	I-80 SB Ramp/Buchanan St	Signal	E	0.914	A	0.526	C	0.732
45	San Pablo Ave/John Muir Pkwy	Signal	B	0.680	D	0.805	A	0.425
46	San Pablo Ave/Hercules Ave	Signal	C	0.762	B	0.697	C	0.711

Exhibit 38: 2030 Scenario A – Intersection LOS²⁵

²⁵ Unsignalized intersections were reported delay in seconds based on the Highway Capacity Manual methods.

2030 Scenario B – San Pablo (III) Intersection LOS

Intersection	Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
		LOS	V/C *	LOS	V/C *	LOS	V/C *
1 San Pablo Ave/San Pablo Dam Rd	Signal	C	0.761	F	1.643	F	1.664
2 Contra Costa Ave/San Pablo Dam	Signal	A	0.493	B	0.672	N/A	N/A
3 Ventura Ave/San Pablo Dam Rd	Signal	A	0.496	F	1.157	N/A	N/A
4 I-80 WB Ramp/San Pablo Dam Rd	Signal	D	0.897	C	0.761	F	1.368
5 I-80 EB Ramp/San Pablo Dam Rd	Signal	F	1.170	F	1.411	F	1.772
6 San Pablo Ave/Rheem Ave	Signal	B	0.629	A	0.560	N/A	N/A
7 San Pablo Ave/Vale Rd	Signal	B	0.607	B	0.644	B	0.623
8 San Pablo Ave/Church Ln	Signal	C	0.769	E	0.909	E	0.959
9 San Pablo Ave/23rd St	Signal	E	0.948	C	0.776	E	0.915
10 San Pablo Ave/McBryde Ave	Signal	A	0.580	B	0.663	A	0.548
11 San Pablo Ave/Roosevelt Ave	Signal	A	0.484	C	0.798	D	0.881
12 San Pablo Ave/Barrett Ave	Signal	D	0.858	F	1.339	E	0.996
13 Swans Way/Barrett Ave	Signal	E	0.941	F	1.002	C	0.728
14 Church Ln/EI Portal Dr	Signal	C	0.762	B	0.671	C	0.706
15 I-80 WB OnRamp/EI Portal Dr	2-Way Stop	F	259.7	D	27.3	C	17.5
16 EI Portal Dr/San Pablo Dam Rd	Signal	E	0.975	E	0.914	F	1.057
17 I-80 EB Ramp/EI Portal Dr	Signal	F	1.015	F	1.157	F	1.023
18 I-80 WB Off Ramp/EI Portal Dr	Signal	F	1.067	F	1.106	E	0.951
19 Appian Wy/San Pablo Dam Rd	Signal	E	0.952	B	0.695	B	0.623
20 23rd St/Rheem Ave	Signal	B	0.644	D	0.818	F	1.299
21 29th St/Rheem Ave	All-Way Stop	C	18.1	C	22.6	N/A	N/A
22 Rumrill Dr/Brookside Dr	Signal	A	0.515	A	0.495	A	0.357
23 Richmond Parkway/Parr Blvd	Signal	D	0.873	E	0.999	A	0.315
24 Western Dr/I-580 Ramp	2-Way Stop	A	9.2	A	9.1	A	9.3
25 Castro St/I-580 WB Ramp	Signal	D	0.883	D	0.866	A	0.464
26 San Pablo Ave/Solano Ave	Signal	B	0.629	A	0.551	N/A	N/A
27 S 23rd St/I-580 WB Ramp	Signal	A	0.487	A	0.459	A	0.307
28 Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.328	A	0.523	A	0.264
29 San Pablo Ave/Garvin Ave	Signal	A	0.521	A	0.553	N/A	N/A
30 San Pablo Ave/Robert Miller Dr	Signal	A	0.516	D	0.840	N/A	N/A
31 San Pablo Ave/Richmond Parkway	Signal	D	0.892	F	1.021	B	0.633
32 San Pablo Ave/Rumrill Blvd	Signal	B	0.675	C	0.745	N/A	N/A
33 San Pablo Ave/Appian Wy	Signal	C	0.710	D	0.833	N/A	N/A
34 San Pablo Ave/Pinole Valley Rd	Signal	F	1.016	D	0.891	N/A	N/A
35 San Pablo Ave/Sycamore Ave	Signal	D	0.814	C	0.787	N/A	N/A
36 23rd St/Market Ave	Signal	C	0.733	F	1.192	N/A	N/A
37 101 SB Ramp/Sir Francis Drake	Signal	A	0.497	A	0.455	A	0.378
38 101 NB Ramp/Sir Francis Drake	Signal	F	1.010	F	1.218	F	1.044
39 Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40 Irwin St/Third St	Signal	D	0.801	D	0.827	C	0.742
41 Hetheron St/Third St	Signal	A	0.589	C	0.744	B	0.660
42 Tamalpais Ave/Third St	Signal	C	0.764	C	0.772	B	0.606
43 I-80 NB Ramp/Buchanan St	Signal	D	0.877	F	1.059	F	1.166
44 I-80 SB Ramp/Buchanan St	Signal	E	0.914	A	0.526	C	0.732
45 San Pablo Ave/John Muir Pkwy	Signal	B	0.675	C	0.797	A	0.416
46 San Pablo Ave/Hercules Ave	Signal	C	0.762	B	0.690	B	0.683

Exhibit 39: 2030 Scenario B – Intersection LOS²⁶

²⁶ Unsignalized intersections were reported delay in seconds based on the Highway Capacity Manual methods.

2030 Scenario C– Three Casino Developments Intersection LOS

Intersection		Control	AM Peak Hour		PM Peak Hour		SAT Peak Hour	
			LOS	V/C *	LOS	V/C *	LOS	V/C *
1	San Pablo Ave/San Pablo Dam Rd	Signal	C	0.753	F	1.611	F	1.636
2	Contra Costa Ave/San Pablo Dam	Signal	A	0.488	B	0.665	N/A	N/A
3	Ventura Ave/San Pablo Dam Rd	Signal	A	0.490	F	1.149	N/A	N/A
4	I-80 WB Ramp/San Pablo Dam Rd	Signal	D	0.893	C	0.756	F	1.362
5	I-80 EB Ramp/San Pablo Dam Rd	Signal	F	1.157	F	1.396	F	1.752
6	San Pablo Ave/Rheem Ave	Signal	B	0.626	A	0.561	N/A	N/A
7	San Pablo Ave/Vale Rd	Signal	B	0.606	B	0.639	B	0.616
8	San Pablo Ave/Church Ln	Signal	C	0.767	E	0.903	E	0.956
9	San Pablo Ave/23rd St	Signal	E	0.967	C	0.800	E	0.957
10	San Pablo Ave/McBryde Ave	Signal	A	0.581	B	0.668	A	0.554
11	San Pablo Ave/Roosevelt Ave	Signal	A	0.486	D	0.802	D	0.887
12	San Pablo Ave/Barrett Ave	Signal	D	0.864	F	1.349	F	1.009
13	Swans Way/Barrett Ave	Signal	E	0.941	F	1.002	C	0.728
14	Church Ln/EI Portal Dr	Signal	C	0.763	B	0.677	C	0.713
15	I-80 WB OnRamp/EI Portal Dr	2-Way Stop	F	261.9	D	28.4	C	18.0
16	EI Portal Dr/San Pablo Dam Rd	Signal	E	0.975	E	0.914	F	1.057
17	I-80 EB Ramp/EI Portal Dr	Signal	F	1.017	F	1.172	F	1.039
18	I-80 WB Off Ramp/EI Portal Dr	Signal	F	1.076	F	1.119	E	0.983
19	Appian Wy/San Pablo Dam Rd	Signal	E	0.952	B	0.694	B	0.623
20	23rd St/Rheem Ave	Signal	B	0.644	D	0.824	F	1.293
21	29th St/Rheem Ave	All-Way Stop	C	18.0	C	23.4	N/A	N/A
22	Rumrill Dr/Brookside Dr	Signal	A	0.537	A	0.531	A	0.400
23	Richmond Parkway/Parr Blvd	Signal	F	1.018	F	1.735	F	1.159
24	Western Dr/I-580 Ramp	2-Way Stop	F	144.1	F	671.6	F	OVRFL
25	Castro St/I-580 WB Ramp	Signal	E	0.911	F	1.229	D	0.822
26	San Pablo Ave/Solano Ave	Signal	B	0.631	A	0.556	N/A	N/A
27	S 23rd St/I-580 WB Ramp	Signal	A	0.487	A	0.458	A	0.305
28	Marina Bay Pkwy/I-580 EB Ramp	Signal	A	0.325	A	0.518	A	0.258
29	San Pablo Ave/Garvin Ave	Signal	A	0.522	A	0.558	N/A	N/A
30	San Pablo Ave/Robert Miller Dr	Signal	A	0.517	D	0.844	N/A	N/A
31	San Pablo Ave/Richmond Parkway	Signal	E	0.941	F	1.098	C	0.728
32	San Pablo Ave/Rumrill Blvd	Signal	B	0.679	C	0.750	N/A	N/A
33	San Pablo Ave/Appian Wy	Signal	C	0.716	D	0.864	N/A	N/A
34	San Pablo Ave/Pinole Valley Rd	Signal	F	1.033	E	0.920	N/A	N/A
35	San Pablo Ave/Sycamore Ave	Signal	D	0.824	D	0.803	N/A	N/A
36	23rd St/Market Ave	Signal	C	0.734	F	1.192	N/A	N/A
37	101 SB Ramp/Sir Francis Drake	Signal	A	0.506	A	0.501	A	0.431
38	101 NB Ramp/Sir Francis Drake	Signal	F	1.010	F	1.288	F	1.123
39	Andersen Dr/Sir Francis Drake	2-Way Stop	F	OVRFL	F	OVRFL	F	OVRFL
40	Irwin St/Third St	Signal	D	0.801	D	0.827	C	0.742
41	Hetheron St/Third St	Signal	A	0.589	C	0.744	B	0.660
42	Tamalpais Ave/Third St	Signal	C	0.764	C	0.772	B	0.606
43	I-80 NB Ramp/Buchanan St	Signal	D	0.877	F	1.059	F	1.166
44	I-80 SB Ramp/Buchanan St	Signal	E	0.914	A	0.526	C	0.732
45	San Pablo Ave/John Muir Pkwy	Signal	B	0.685	D	0.813	A	0.435
46	San Pablo Ave/Hercules Ave	Signal	C	0.762	C	0.706	C	0.740

Exhibit 40: 2030 Scenario C – Intersection LOS²⁷

²⁷ Unsignalized intersections were reported delay in seconds based on the Highway Capacity Manual methods.

Scenario A – Freeway and Ramp LOS

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	C	25.5	E	35.2	E	43.9
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	D	28.3	E	37.1	E	43.1
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	27.7	F	37.8	D	32.4
	I-80 n/o San Pablo Dam Road	Freeway Mainline	D	26.4	F	OVRFL	E	42.7
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	F	OVRFL	C	24.5	D	28.8
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	F	47.6	D	31.4	D	33.1
	On-Ramp from San Pablo Dam Road	Ramp Merge	D	29.9	D	31.0	D	33.5
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	39.2	C	25.7	D	31.4

Exhibit 41: 2030 Scenario A – Freeway and Ramp LOS

Scenario B – Freeway and Ramp LOS

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	D	26.4	E	37.8	F	OVRFL
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	D	30.0	E	39.8	F	46.5
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	27.7	F	38.1	D	32.7
	I-80 n/o San Pablo Dam Road	Freeway Mainline	D	26.5	F	OVRFL	E	43.1
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	F	OVRFL	C	24.7	D	29.0
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	F	47.8	D	31.7	D	33.5
	On-Ramp from San Pablo Dam Road	Ramp Merge	D	30.3	D	33.3	C	24.6
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	39.8	D	27.2	D	33.7

Exhibit 42: 2030 Scenario B – Freeway and Ramp LOS

Scenario C – Freeway and Ramp LOS

Location		Type	AM Peak Hour		PM Peak Hour		Sat Peak Hour	
			LOS	Density	LOS	Density	LOS	Density
Eastbound	I-80 s/o San Pablo Dam Road	Freeway Mainline	D	26.3	E	37.5	F	OVRFL
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	D	29.8	E	39.5	F	46.1
	On-Ramp from San Pablo Dam Road	Ramp Merge	C	27.8	F	40.8	D	32.8
	I-80 n/o San Pablo Dam Road	Freeway Mainline	D	26.5	F	OVRFL	E	43.2
Westbound	I-80 n/o San Pablo Dam Road	Freeway Mainline	F	OVRFL	C	24.7	D	29.1
	Off-Ramp to San Pablo Dam Road	Ramp Diverge	F	47.9	D	31.8	D	33.6
	On-Ramp from San Pablo Dam Road	Ramp Merge	D	30.3	D	33.1	C	24.3
	I-80 s/o San Pablo Dam Road	Freeway Mainline	E	39.7	D	27.0	D	33.5

Exhibit 43: 2030 Scenario C – Freeway and Ramp LOS

2030 Arterial Level of Service

Arterial Level of Service on San Pablo Ave		Northbound	Southbound
AM Peak Hour	2030 Scenario A	D	D
	2030 Scenario B	D	D
	2030 Scenario C	D	D
PM Peak Hour	2030 Scenario A	D	F
	2030 Scenario B	D	F
	2030 Scenario C	D	F
Saturday Peak Hour	2030 Scenario A	D	F
	2030 Scenario B	D	F
	2030 Scenario C	D	F

Exhibit 44: 2030 Arterial Level of Service

TRANSIT, PEDESTRIAN AND BICYCLE IMPACTS

Existing Transit System

Bus Service

The Alameda Contra Costa Transit District (AC Transit) and the Western Contra Costa Transit Authority (WestCAT) provide bus service in Western Contra Costa County. Four AC Transit bus routes currently operate near Casino San Pablo: Routes 70 (Appian), 72 (San Pablo Avenue), 72R (San Pablo Rapid), and L (Pierce). Bus shelters with transit schedules are located at the three stops along San Pablo Avenue near Casino San Pablo. Cities served, frequencies, hours and days of operation, and major bus stops are detailed in Exhibit 45. WestCAT operates bus service in the northern part of the county, serving the cities of Pinole, Hercules, Rodeo, and Crockett. There is currently no bus service operating in the vicinity of the proposed Sugar Bowl Rancheria or Point Molate Casino/Resort. Exhibit 45 through Exhibit 48 were obtained from 511.org.

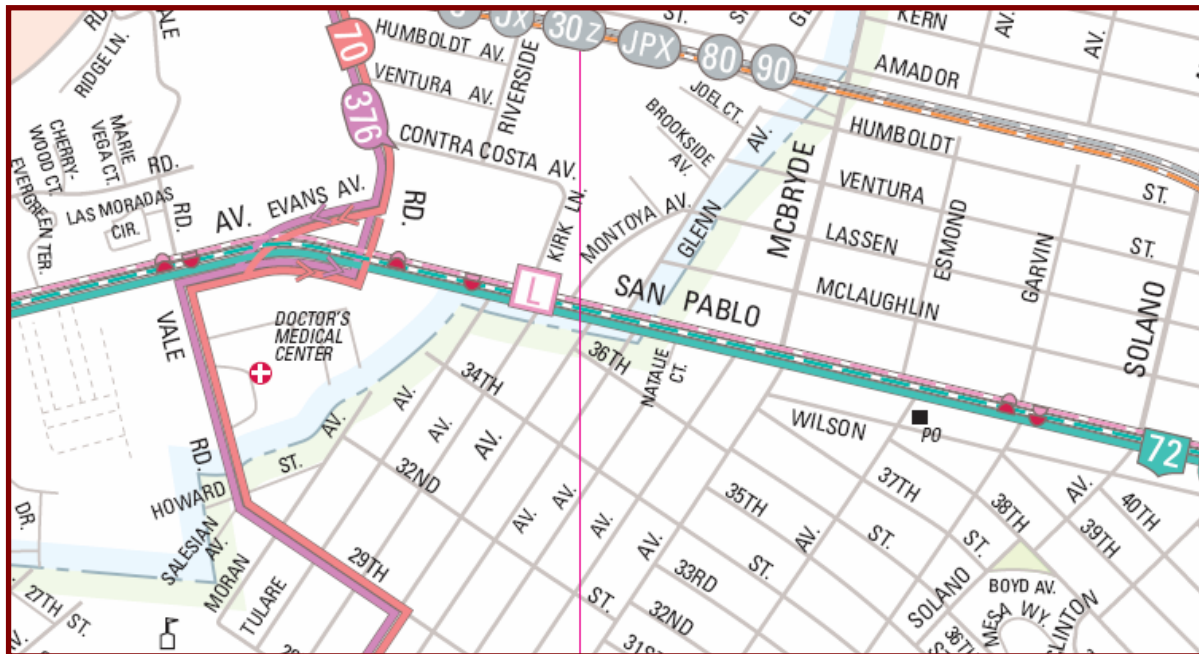


Exhibit 45: AC Transit Service Route

Route	Cities Served	Timepoints	Days	Times	
70 Appian	Richmond San Pablo El Sobrante	Richmond Parkway Transit Center Pinole Vista Shopping Center Appian Way & La Paloma Rd. San Pablo Dam Rd. & El Portal Dr. 23rd St. & Rheem Ave. Richmond BART	Weekday	First	6:00 AM
				Last	9:00 PM
				Frequency	30 min
			Weekend	First	7:00 AM
				Last	8:00 PM
				Frequency	60 min
72 San Pablo Avenue	Oakland Emeryville Berkeley Albany El Cerrito Richmond San Pablo	Oakland Amtrak 14th St. & Broadway 40th St. & San Pablo Ave. University Ave. & San Pablo Ave. El Cerrito Plaza BART El Cerrito Del Norte BART San Pablo Ave. & Vale Rd. Contra Costa College Hilltop Mall Shopping Center	Weekday	First	5:00 AM
				Last	12:00 AM
				Frequency	30-40 min
			Weekend	First	6:00 AM
				Last	11:30 PM
				Frequency	30 min
72R San Pablo Rapid	Oakland Emeryville Berkeley Albany El Cerrito Richmond San Pablo	14th St. & Broadway 40th St. & San Pablo Ave. University Ave. & San Pablo Ave. El Cerrito Del Norte BART San Pablo Ave. & Vale Rd. Contra Costa College	Weekday	AM First	6:00 AM
				AM Last	7:00 PM
				Frequency	12-15 min
			Weekend	No service	
L Pierce	San Pablo Richmond Albany San Francisco	Princeton Plaza Shopping Center Cutting Blvd. & San Pablo Ave. Central Ave. & San Pablo Ave. Pierce St. near Gateview Ave. San Francisco Transbay Terminal	Weekday	First AM	5:30 AM
				Last AM	8:30 AM
				Frequency	20 min
				First PM	3:15 PM
				Last PM	9:00 PM
			Frequency	15-60 min	
Weekend	No Service				

Source: AC Transit and Dowling Associates

Exhibit 46: Transit Service Table

Rail Service

The Bay Area Rapid Transit (BART) District provides regional rapid transit service for the Bay Area. The nearest BART station to the project sites is the Richmond station at 19th Street and Nevin Avenue, which is 3.5 miles from both Casino San Pablo and the proposed Sugar Bowl Rancheria, and 5.75 miles from the proposed Point Molate Casino/Resort. Direct service is provided to Fremont and San Francisco, with connections to Dublin-Pleasanton, Pittsburg-Bay Point, and San Francisco Airport trains in Oakland. Richmond-Fremont service begins at 4:20 am, 5:55 am, and 8:15 am on weekdays, Saturdays, and Sundays/Holidays, respectively, and runs until 12:15 am. Trains operate in 15-minute intervals during the weekdays and in 20 minutes intervals during the weekday evening and night periods. Trains operate in 20-minute intervals on Saturday and Sunday/Holidays. Richmond-Daly City service begins at 5:15 am and 8:50 am on the weekdays and Saturday, respectively, and runs until 5:50 pm. Trains operate in 15-minute intervals during the weekdays and 20-minute intervals on Saturdays. There is no direct service to Daly City from Richmond in the evenings or on Sundays/Holidays.



Exhibit 47: BART System Map

Amtrak operates an intra-state railroad from the Richmond BART station, providing service to Sacramento-San Jose and San Joaquin Valley. Capitol Corridor trains to Sacramento-San Jose operate from 6:00 am and 7:00 am on weekdays and weekends/holidays, respectively, until 10 pm. Headways are 60 minutes during peak-hours on weekdays, and 90-120 minutes on mid-day and evening, as well as all day on the weekends/holidays. Four daily trains to San Joaquin Valley operate between 8:00 am and 6:00 pm.

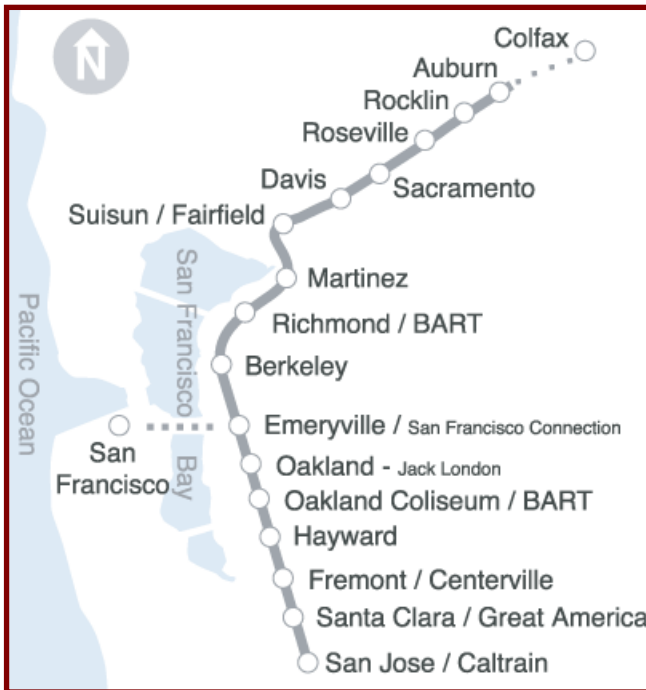


Exhibit 48: Amtrak Capital Corridor Map

Future changes to rail service in Western Contra Costa County include a new Amtrak station on the waterfront near Refugio Creek in Hercules, a project listed in the Capitol Corridor's Short-term Improvement Plan.²⁸ BART and Amtrak have recommended coordinated funding to include additional commuter rail service along Amtrak's Capitol Corridor line, and an expansion of BART's tracks from its current terminus at the Richmond Station to Solano County using Diesel-Motorized Unit (DMU) trains is under study.²⁹

Ferry Service

There is currently no ferry service in Western Contra Costa County. Future plans for ferry service include two new routes to San Francisco's Ferry Terminal, a 29-minute journey from Richmond and a 42-minute journey from Hercules. The Richmond ferry terminal will be located at Ford Point at the southern terminus of Harbor Way South and ferry service is expected to begin in 2009. The Hercules ferry terminal will be located at the base of Refugio Creek near the proposed Amtrak Station and service is expected to begin in 2012.³⁰



Exhibit 49: Existing and Proposed Ferry Service Map

²⁸ *Capitol Corridor Intercity Passenger Rail Service: Business Plan Update: FY2006-2007 to FY2007-2008.* Prepared by Capitol Corridor Joint Powers Authority. Final Draft. April 2006.

²⁹ BART website, Planning Department, I-80/West Contra Costa Corridor. Accessed April 25, 2006. http://www.bart.gov/docs/planning/I80_WEST_CONTRA_COSTA.pdf

³⁰ Water Transit Authority website. Accessed April 25, 2006. <http://www.watertransit.org>.

Existing and Planned Bicycle Facilities

The project areas contain designated bicycling facilities, including roadway and trail facilities. Additionally, Contra Costa County adopted its *Countywide Bicycle and Pedestrian Plan* in December 2003 and the plan is currently being updated. The classification system for bikeways are Class I (grade-separated trails that are exclusively for non-motorized access), Class II (bicycle lanes on roadways accompanied by sign designations), and Class III (bicycle routes on roadways designated by signs). The lack of bicycle designations on city streets does not preclude bicycle usage, as they are defined as a vehicle in the California Vehicle Code and subject to the same rules governing motor vehicles. Other facilities for bicyclists may include parking, traffic signal loop detectors, and employee locker/showering facilities.

The proposed location for Sugar Bowl Rancheria is in close proximity to the San Francisco Bay Trail, a 400-mile non-motorized trail facility that encircles San Francisco and San Pablo Bays. About 240 miles of this regional trail have been built. When completed, it will provide ample hiking, walking, and bicycling access to 9 counties, 47 cities, and 57,000 acres of open space in the Bay Area. Thus, biking access to the San Francisco Bay Trail will be highlighted in this discussion.

According to the *Contra Costa Countywide Bicycle and Pedestrian Plan*, the San Francisco Bay Trail website, and field work done by Dowling, existing bikeways may be found in the project areas:

Casino San Pablo

- San Pablo Avenue - Class II and Class III from Lowell Avenue to Stanton Avenue
- San Pablo Dam Road – Class II and Class III from San Pablo Avenue to Barranca
- Kirk Lane-Riverside Avenue – Class III from Amador Street to San Pablo Avenue

Sugar Bowl Rancheria

- San Pablo Creek – Class I from Richmond Parkway to the San Francisco Bay Trail
- San Francisco Bay Trail – Class I paralleling Richmond Parkway from Gertrude Avenue to Goodrick Avenue with a spur along Wildcat Creek Trail.

Point Molate Casino/Resort

- No designated bicycle facilities

Future changes to the bikeway network include additions in the project study areas, such as:

Casino San Pablo

- Wildcat Creek – Class I from Tulare Street at San Pablo Avenue along the creek that connects to the existing Class I facility near 20th Street.
- San Pablo Dam Road – Class II and Class III from El Sobrante to Orinda
- San Pablo Avenue – Class II and Class III through Richmond

Sugar Bowl Rancheria

- Richmond Parkway – Class II and Class III from Pennsylvania Avenue to Parr Boulevard
- Goodrick Avenue – Class I from Richmond Parkway to Rheem Creek

- San Pablo Marsh - Class I encircling San Pablo Marsh wetlands and the landfill from the San Pablo Creek Trail with a Class III connection to the Wildcat Creek Trail.

Point Molate Casino/Resort

- Western Drive – Class II or III from I-580 to end at Point San Pablo

Other high priority projects

- A 3.7-mile northern bikeway connection to the Richmond BART station
- Closing gaps in the San Francisco Bay Trail, especially along Richmond Parkway from Pennsylvania Avenue to Gertrude Avenue

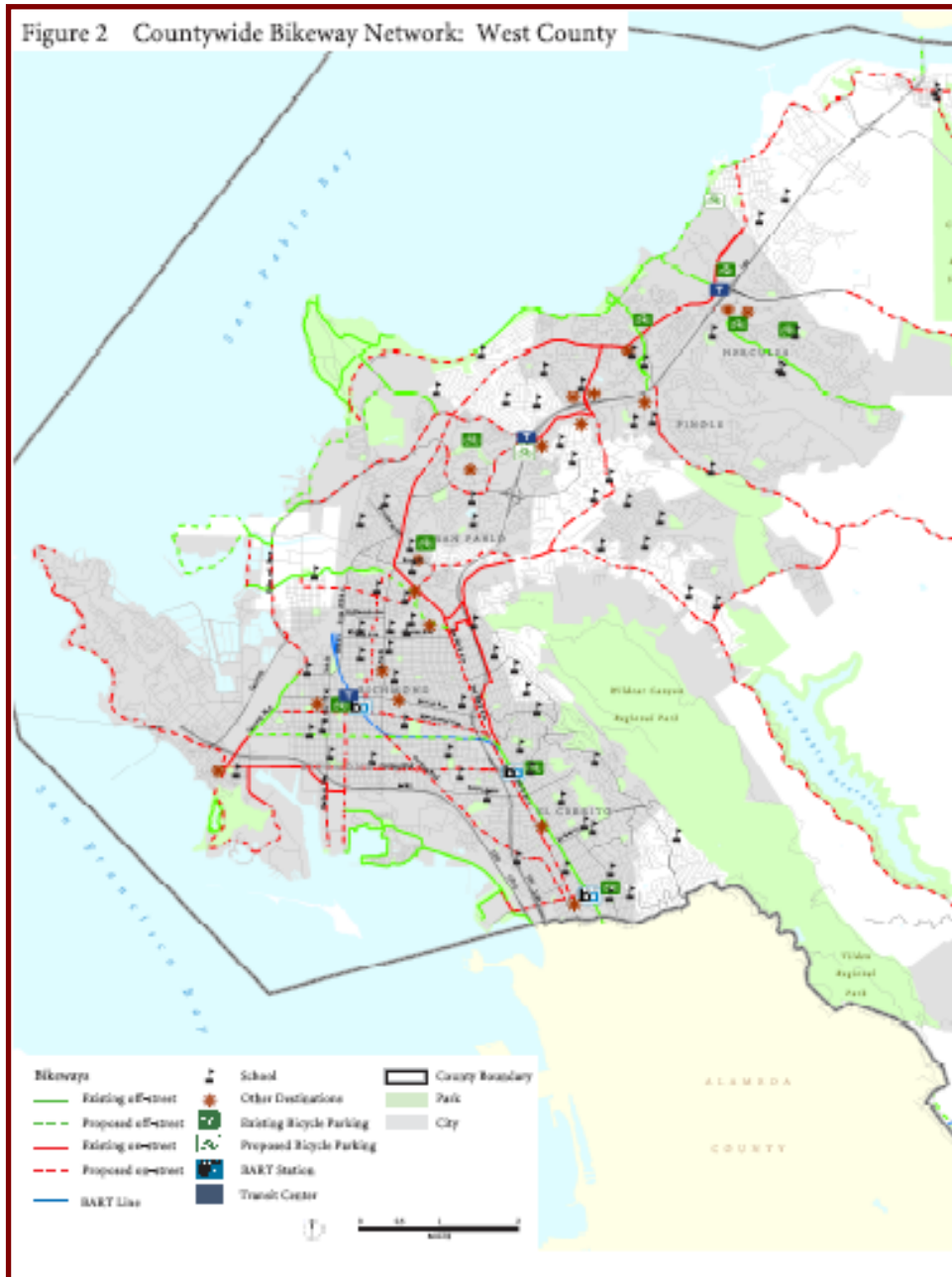


Exhibit 50: Existing and Proposed Bicycle Network

Field observations of the project sites in March 2006 revealed no public bicycle parking facilities or bicycle loop detectors at signalized intersections. It is unknown whether Casino San Pablo offers secure bicycle parking or showering facilities to its bicycling employees.

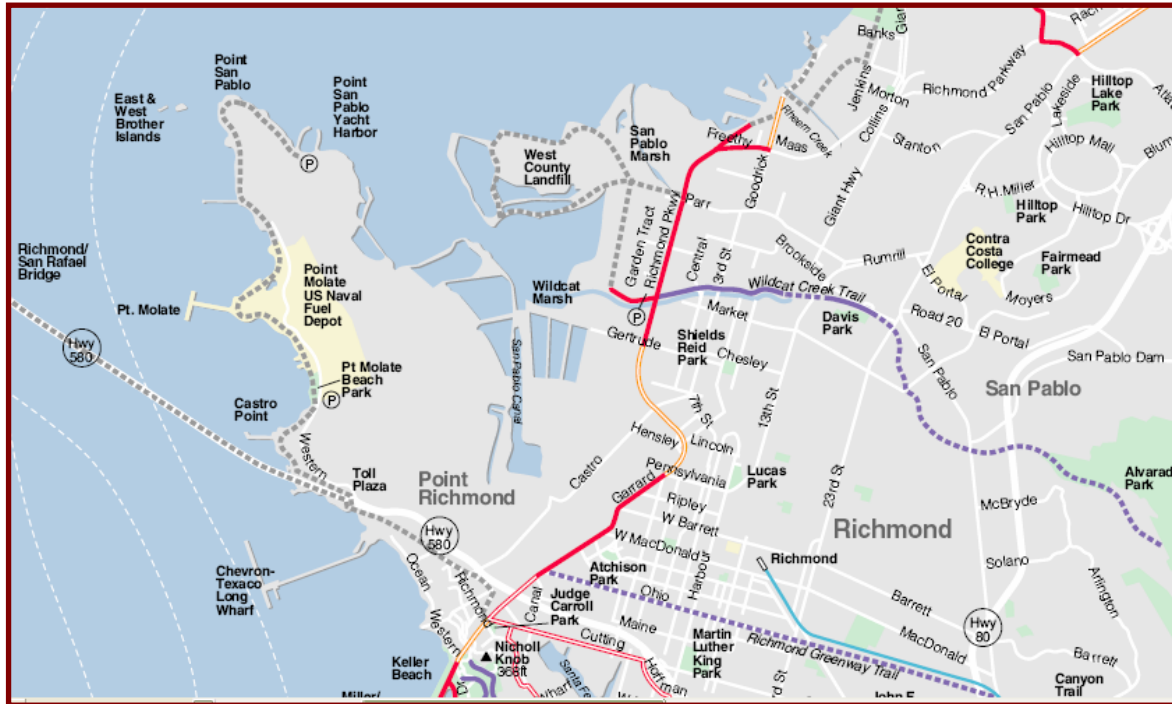


Exhibit 51: Existing and Proposed Improvements in the Project Areas on the San Francisco Bay Trail

Existing and Planned Pedestrian Facilities

Regardless of primary mode of travel, almost everyone is a pedestrian for a portion of their journey. Public pedestrian facilities are necessary to provide connectivity to activity centers, for recreation, and for neighborhood vitality. Providing a transportation system that encompasses the needs of pedestrians has become increasingly important, especially for compliance with Americans with Disabilities Act (ADA) requirements. Pedestrian facilities include walkways, roadway crossing aids, street-oriented urban design, and streetscape.

Currently, pedestrian roadway facilities are only provided around one of the project sites, Casino San Pablo. Concrete sidewalks in reasonable condition are located on both sides of San Pablo Avenue between Vale Road and Tulare Avenue. Several businesses along this segment of San Pablo Avenue, including Casino San Pablo, locate their surface parking lots adjacent to walkways, which creates long stretches for pedestrians. While Casino San Pablo provides landscaping and fencing along their parking lot, most of the other parking lots are bare. The abundance of driveways leading in and out of parking lots along San Pablo Avenue also creates several potential pedestrian-motor vehicle conflict locations. Aside from bus stop shelters, there are no benches or other resting places. While there is

no pedestrian-scaled lighting along this portion of San Pablo Avenue, parking lot security guards and the 24-hour activity at the Casino San Pablo may provide a sense of security for pedestrians.

While no pedestrian roadway facilities are available at the proposed site for Sugar Bowl Rancheria, existing trail facilities include the San Francisco Bay Trail parallel to Richmond Parkway from Gertrude Avenue to Goodrick Avenue and a path along San Pablo Creek and Wildcat Creek from the Richmond Parkway to the San Francisco Bay Trail. Additionally, there are raised curbs and dirt shoulders along Parr Boulevard near the project site, but utility poles and brush are often located in the footpath.



Exhibit 52: Photos Taken at a Driveway of Casino San Pablo

The following roadway crossings for pedestrians on San Pablo Avenue in the vicinity of Casino San Pablo were analyzed for facilities and convenience:

Vale Road at San Pablo Avenue is a signalized intersection with marked crosswalks; audible, pedestrian-actuated signals; pedestrian signal heads; and pedestrian ramps on all four legs. Detectable, truncated dome warnings for sight-impaired pedestrians were not installed on pedestrian ramps and the raised roadway median does not serve as a pedestrian refuge.

San Pablo Dam Road at San Pablo Avenue is a signalized intersection with marked crosswalks; audible, pedestrian-actuated signals; pedestrian signal heads; detectable, truncated dome warnings; and pedestrian ramps on all legs except the north leg. Pedestrians are prohibited from crossing the northern leg of the intersection. The raised roadway median does not serve as a pedestrian refuge.

Food Maxx driveway at San Pablo Avenue is a signalized T-intersection with marked crosswalks; audible, pedestrian-actuated signals; pedestrian signal heads; and pedestrian ramps on all legs except the south leg. Pedestrians are prohibited from crossing the south leg of the intersection. The raised roadway median does not serve as a pedestrian refuge.

Tulare Avenue at San Pablo Avenue is a side-street, stop-controlled T-intersection with a marked crosswalk on the western leg only. While pedestrians are not explicitly

prohibited from crossing San Pablo Avenue at this intersection, the roadway width, median design, and vehicle volumes discourage pedestrian crossings. The raised roadway median does not serve as an ADA compliant pedestrian refuge.

The following roadway crossings for pedestrians on San Pablo Avenue in the vicinity of the proposed site for Sugar Bowl Rancheria were analyzed for facilities and convenience:

Richmond Parkway at Parr Boulevard is a signalized intersection. Pedestrians are prohibited from crossing Richmond Parkway at this intersection. A marked crosswalk and pedestrian ramps are located on the western leg of the intersection.

According to the *Contra Costa Countywide Bicycle and Pedestrian Plan* and the San Francisco Bay Trail website, future pedestrian improvements may be found in the project areas. Near Casino San Pablo, a trail from Tulare Street at San Pablo Avenue along Wildcat Creek will be installed that connects to the existing trail facility near 20th Street. Near the proposed site for the Sugar Bowl Rancheria, trails will be installed around San Pablo Marsh wetlands and parallel to Goodrick Avenue from Richmond Parkway to Rheem Creek. Other high priority projects include installing curb ramps in the unincorporated areas of the county, which may include the vicinity around Sugar Bowl Rancheria.

Pedestrian and bicycle volumes at 28 observed intersections near project sites during the weekday AM and PM peak hours and Saturday PM hours are indicated in Exhibit 53 (next page).

#	Intersection	Pedestrians			Bicyclists		
		Weekday		Saturday	Weekday		Saturday
		AM	PM	PM	AM	PM	PM
4	San Pablo Dam Rd at I-80 Westbound ramp	N/A	N/A	10	N/A	N/A	2
5	San Pablo Dam Rd at I-80 Eastbound ramp	N/A	N/A	10	N/A	N/A	2
7	San Pablo Ave at Vale Rd	N/A	N/A	66	N/A	N/A	15
9	San Pablo Ave at 23rd St/ Road 20	N/A	N/A	88	N/A	N/A	16
11	San Pablo Ave at Roosevelt Ave	N/A	N/A	19	N/A	N/A	6
20	Rheem Ave at 23rd St	139	128	72	17	14	18
21	Rheem Ave at 29th St	32	55	N/A	3	5	N/A
22	Rumrill Blvd at Brookside Dr	22	25	19	6	12	8
23	Richmond Pkwy at Parr Blvd	N/A	N/A	0	N/A	N/A	0
24	Western Dr at I-580 ramp	0	0	0	0	0	0
25	Castro St at I-580 Westbound ramp	N/A	N/A	0	N/A	N/A	0
27	So 23rd St at I-580 Westbound ramp	5	6	4	2	9	6
28	Marina Bay Pkwy at I-580 Eastbound ramp	6	5	6	6	6	6
31	San Pablo Ave at Richmond Pkwy	N/A	N/A	9	N/A	N/A	1
33	San Pablo Ave at Appian Wy	15	14	N/A	2	3	N/A
34	San Pablo Ave at Pinole Valley Rd	24	46	N/A	7	7	N/A
35	San Pablo Ave at Sycamore Ave	18	33	N/A	6	5	N/A
36	23rd St at Market Ave	174	121	N/A	13	20	N/A
37	Sir Francis Drake Blvd at US 101 Southbound ramp	0	0	0	0	1	0
38	Sir Francis Drake Blvd at US 101 Northbound ramp	0	0	0	0	0	0
39	Andersen Dr at Sir Francis Drake Blvd	0	0	0	1	0	0
40	3rd St at Irwin St	95	128	87	29	34	16
41	3rd St at Hetherston St	197	204	93	21	17	15
42	3rd St at Tamalpais Ave	214	266	178	33	29	30
43	Buchanan St at I-80 Northbound ramp	11	10	11	9	17	20
44	Buchanan St at I-80 Southbound ramp	10	9	10	0	17	20
45	San Pablo Ave at John Muir Pkwy	40	41	7	4	1	0
46	San Pablo Ave at Hercules Ave	42	19	8	3	2	1

Exhibit 53: Existing Pedestrian and Bicycle Volumes

APPENDIX 1

Traffic Forecasts - West Contra Costa Casinos

Dowling Associates engaged ECONorthwest to forecast 2011 traffic levels resulting from the operation of one or more of three Indian casinos proposed in West Contra Costa County. Specifically, ECONorthwest was asked to forecast:

- Total traffic resulting from operation of the San Pablo Casino as a Class-II facility and the Scotts Valley Band proposed Class-III casino (Scenario A); and
- Total traffic if the San Pablo Casino were converted into a Class-III gaming facility with 2,500 slot machines (Scenario B);
- Total traffic resulting from operating San Pablo Casino as a Class-III facility, together with the proposed Class-III Sugar Bowl and Point Molate casinos (Scenario C);
- Number of annual casino trips originating in the San Jose area and Santa Clara County for each of the scenarios.

ECONorthwest's analysis follows:

Traffic Forecast Assumptions and Methodology

The casino model weighs the driving times to casinos, income demographics, age demographics, and seasonal population patterns of each zip code in California. In addition to the three casinos posed in this analysis, the model takes into consideration 13 existing and competing casinos as defined by their proximities to Richmond. Using known patterns of casino gaming and the effects of having multiple casino choices, the model predicts the number of visits to the casinos and the average dollars worth of play per visit. The model assumes the casinos are all Class-III, except in the third scenario where San Pablo operates as a Class-II casino.

In work with tribes planning new casinos, the model is modified to account for a ramp-up period, which is characterized by rapidly growing visitor levels. Casinos and hotels normally experience rapid rates of consumer awareness in their first few years followed by a maturing in visitor counts where revenues track more closely demand fluctuations in the market.

For the purposes of this analysis, since firm opening dates were not provided, a ramp-up period was not imposed. The forecast assumes that the level of business at the casinos is at a mature, stabilized level of activity in 2011. Effectively, this makes 2011 a normal future year of full-scale operations that is only limited by the dimensions of the casinos, their locations, and the demographics of their feeder markets in 2011.

Elements from past research were incorporated into the analysis. Among those used to complete this report are:

- Predicting traffic requires consideration for trips by employees and support services. Casinos are labor-intensive. The model estimates employment based on a regression equation linked to the number of hours visitors would spend on the property. Adjustments were made for the hotel at the Point Molate Casino. Three percent was added to account for delivery and other vehicles.
- The gaming behavior at the casinos is assumed to reflect that of a locals casino and not a tourist casino or exurban casino.
- Given that urban casinos are much more convenient to the homes of patrons, visitors to them will not depend as heavily on food, beverage, and other amenities as would patrons to more distant casinos. The distribution of patron hours reflects this.
- Tourism visits, which are patrons from more than 150-minutes away, were accounted for. Given the proximity of the Richmond casinos to so many competing attractions, the casinos will not pull in as many tourists as would an Indian casino in a less cluttered location.
- The San Francisco market is deeply supply-constrained for casino gaming. The initial output of the casino model showed levels of play, as measured in hours, exceeding the practical capacities of the proposed casinos. Capacity constraints had to be imposed on the model.
- It is assumed, based on actual observations at casinos, that the typical patron would arrive 1.80 persons to a vehicle and that there would be 1.15 employees per vehicle (240 vehicle visits per employee per year).
- One vehicle visit equals two trips--one into and one out of the casino property. Patron visits are the number of customers walking into the casino.
- Gaming dollars reported here include the effects of inflation. To adjust the reported amounts for 2011 back into 2007 dollars, one should multiply the results by 86.8 percent.

Scenario A: Class-II San Pablo Casino and Class-III Sugar Bowl Casino

In this scenario, it is assumed that the San Pablo Casino would continue operating as a Class-II facility, and that only one competitor, the Sugar Bowl Casino, would open nearby. As in the previous analyses, the forecast presented here describes visitor counts in 2011.

By choosing to remain a Class-II facility, the Lytton Band's San Pablo Casino would be at a competitive disadvantage because of its proximity to the Scotts Valley Band's Class-III Sugar Bowl Casino.

Players prefer Class-III gaming. This has three significant consequences for the San Pablo Casino:

1. The Sugar Bowl would have a preferred product and, as such, is going to attract better (heavier playing) patrons. It would also attract more slot players.

2. Play cycles on Class-II machines are noticeably slower than on Class-III machines. The devices at San Pablo would be less productive under this third scenario and player turnover would be slower.

3. The lack of Class-III table games at San Pablo will also hurt revenues and visitor counts.

Limiting itself to Class-II gaming and facing nearby competition would reduce revenues at San Pablo by 48 percent and vehicle visits by 41 percent versus Scenario B, which calls for the San Pablo Casino to be a Class-III casino with no local competition at all.

While San Pablo does less well in this scenario, the opposite is so for the Sugar Bowl Casino. Unlike the second scenario where the Sugar Bowl faced competition from the Point Molate Casino, in this case it would only have one comparatively weak Class-II competitor. Thus, player visits for the Sugar Bowl Casino would be higher in Scenario A than in Scenario C.

The results of this scenario reveal that San Pablo would attract about 6.2 million patrons in 2011. Since they would lack Class-III table games and capture fewer visitors overall, in this scenario the San Pablo Casino needs fewer workers than in the first two scenarios. Thus, the combined effect results in a facility that would get 3,710,337 visits from vehicles in 2011, which is substantially less than before.

At Sugar Bowl, the number of patrons would rise from about 7,870,000 in the second scenario to 8,918,000 in this case because they would have only one competitor and that competitor would be limited to Class-II gaming. At this level of activity, the Sugar Bowl Casino would be severely capacity constrained and would be getting revenues per machine of nearly \$520 a day-putting it near the very highest end of the range for casinos nationally.

Casinos in 2011	San Pablo Class II	Sugar Bowl Class III	Third Scenario Total
Casino operations:			
Gaming revenues	\$307,333,524	\$505,967,311	\$813,300,835
Employees (FTE's)	1,150	2,150	3,300
Individual Visitors:			
Patrons	6,233,647	8,918,796	15,152,443
Employees & other	284,280	531,480	815,760
Total	6,517,927	9,450,276	15,968,203
Vehicle Visits:			
Patrons	3,463,137	4,954,887	8,418,024
Employees & other	247,200	462,157	709,357
Total Vehicles	3,710,337	5,417,043	9,127,380

Exhibit 54: Scenario A: Gaming Revenues, Employment, and Visitor Counts in 2011

Exhibit 55 (Next page) shows the number of patrons, the number of employee vehicle visits, and the total of all vehicle visits from Santa Clara County to the two casinos under Scenario A.

Exhibit 55: Scenario A: Santa Clara County Patron & Vehicle Visits in 2011

Zip Code	City	Visits to San Pablo by			Visits to Sugar Bowl by		
		Patrons	Worker Vehicles	All Vehicles	Patrons	Worker Vehicles	All Vehicles
San Jose Zip Codes:							
95110	San Jose	8,111	209	4,696	13,700	417	7,998
95111	San Jose	20,476	-	11,313	34,844	209	19,466
95112	San Jose	22,517	209	12,656	38,271	209	21,360
95113	San Jose	262	-	145	445	-	246
95116	San Jose	16,648	209	9,413	28,902	209	16,183
95117	San Jose	17,144	-	9,472	28,876	209	16,169
95118	San Jose	16,955	-	9,368	28,750	-	15,884
95119	San Jose	4,539	-	2,508	7,468	-	4,126
95120	San Jose	18,164	-	10,035	29,356	-	16,219
95121	San Jose	15,414	-	8,516	26,253	209	14,720
95122	San Jose	17,635	209	9,959	30,447	209	17,037
95123	San Jose	31,086	-	17,175	52,117	-	28,794
95124	San Jose	23,825	-	13,163	39,529	-	21,839
95125	San Jose	27,846	-	15,385	46,817	209	26,081
95126	San Jose	17,510	209	9,889	29,774	209	16,665
95127	San Jose	19,364	-	10,698	32,995	209	18,445
95128	San Jose	17,661	-	9,757	29,757	209	16,655
95129	San Jose	20,355	-	11,246	33,636	-	18,583
95130	San Jose	6,881	-	3,802	11,503	-	6,355
95131	San Jose	15,299	-	8,452	25,922	209	14,537
95132	San Jose	17,570	-	9,707	30,755	-	16,992
95133	San Jose	9,685	-	5,351	16,694	-	9,223
95134	San Jose	11,396	-	6,296	19,455	-	10,749
95135	San Jose	10,101	-	5,581	16,560	-	9,149
95136	San Jose	20,792	-	11,487	34,918	-	19,292
95138	San Jose	8,017	-	4,429	13,322	-	7,360
95139	San Jose	3,216	-	1,777	5,303	-	2,930
95148	San Jose	16,685	-	9,218	28,701	-	15,857
Subtotal		435,155	1,045	241,494	735,069	2,716	408,914
Other Zip Codes:							
94022	Los Altos	12,461	-	6,884	20,403	-	10,803
94024	Los Altos	12,625	-	6,975	21,347	-	11,154
94035	Mountain View	58	-	32	100	-	52
94040	Mountain View	18,110	-	10,006	30,633	-	16,277
94041	Mountain View	9,946	-	5,495	16,626	-	8,838
94043	Mountain View	21,516	-	11,888	35,598	-	19,169
94085	Sunnyvale	11,967	-	6,612	20,157	209	10,940
94086	Sunnyvale	28,507	-	15,750	47,773	209	25,562
94087	Sunnyvale	27,984	-	15,461	46,638	-	24,562
94089	Sunnyvale	10,558	-	5,833	17,984	-	9,501
94301	Palo Alto	12,669	-	6,999	20,721	-	11,062
94304	Palo Alto	2,310	-	1,276	3,783	-	2,006
94305	Stanford	3,163	-	1,748	5,211	-	2,723
94306	Palo Alto	17,524	-	9,682	28,626	-	15,256
95002	Alviso	1,204	-	665	2,035	-	1,092
95008	Campbell	28,156	-	15,556	47,133	209	25,228
95013	Coyote	46	-	25	75	-	39
95014	Cupertino	31,743	-	17,538	53,074	-	28,104
95020	Gilroy	18,476	-	10,208	28,739	-	14,983
95030	Los Gatos	8,018	-	4,430	12,929	-	6,702
95032	Los Gatos	14,719	-	8,132	24,242	-	12,769
95035	Milpitas	32,103	209	17,952	54,352	626	29,937
95037	Morgan Hill	19,599	-	10,828	31,291	-	16,348
95046	SanMartin	2,181	-	1,205	3,443	-	1,778
95050	Santa Clara	20,349	-	11,242	34,493	209	18,359
95051	Santa Clara	32,212	-	17,797	54,374	209	28,745
95053	Santa Clara	158	-	87	266	-	142
95054	Santa Clara	11,270	-	6,227	19,008	-	10,149
95070	Saratoga	17,619	-	9,734	29,181	-	15,360
95140	Mount Hamilton	135	-	75	187	-	98
Santa Clara Zip Codes		862,541	1,254	477,836	1,445,491	4,387	786,686

Scenario B: Class-III San Pablo Casino Only

In this scenario, it is assumed that the San Pablo Casino is converted to a Class-III operation with 2,500 slot machines and 63 table games. The other two tribes would not have casinos in the area. It is further assumed that the San Pablo Casino would have seating for 900 in restaurants and bars on-site, but not have a hotel.

The model forecasts that demand for a single Class-III casino would be triple the physical capacity of the San Pablo Casino. For this reason, visitor numbers to this facility, if built without another casino nearby, would be limited by its capability to serve rather than market demand. Such operations are unusually profitable because management does not have to concern itself with local customer burn rates³¹, the need for costly marketing and promotions, and offering high levels of service.

For the purposes of the model, we had to assume a capacity constraint and chose to apply a usage rate of 11.5 hours per day per gaming unit. In normal casinos, 8.5 hours is the signal to expand. At 8.5, the peak hour in a normal week at a casino is 2.8 times as busy as the average hour during the week. At this level most Indian casinos are too often uncomfortably crowded and risk losing customers. In a local casino, because people find it easier to drop in at off-peak times, a ratio as low as 2.3 is the trigger. This equals about 10.4 hours of play per gaming unit. For Scenario B, a peak-to-average ratio of about 2.08 (11.5 hours) was used. This assumes local players would significantly modify their visit behavior around the crowded conditions.

The model results for Scenario B are shown in Exhibit 56. It reveals that the casino would generate over \$585 million in gaming revenues in 2011 and require 2,500 employees. Such a facility in a locals environment would get over ten million visits, however, they would average less than two hours each. In total, 6,248,809 vehicles would visit the property during the year.

Exhibit 56: Scenario B: Revenues, Employment, and Visitor Counts in 2011

<u>Casinos in 2011</u>	<u>San Pablo</u>
Casino operations:	
Gaming revenues	\$585,737,186
Employees (FTE's)	2,500
Individual Visitors:	
Patrons	10,280,551
Employees & other	618,000
Total	10,989,551
Vehicle Visits:	
Patrons	5,711,417
Employees & other	537,391
Total Vehicles	6,248,809

³¹ Burn rate is a term which means that non-regular customers (non-gambler) go to gaming facilities once a while. However, these types of customers would get tired of gambling easily because they lose money or interests.

A Class-III San Pablo Casino with no nearby competitors would attract just over 1.5 million patrons a year from Santa Clara County and 755,763 would come from San Jose zip codes. Few workers would come from Santa Clara County, however, because there is a very large pool of workers within closer commuting distances that would have the skill sets needed by a casino. Overall, 838,536 vehicles would visit the casino in 2011 from Santa Clara County.

Exhibit 57: Scenario B: Santa Clara County Patron³² & Vehicle Visits³³ in 2011

San Jose Zip Codes	City	Patrons	Worker Vehicles	All Vehicles	Other Zip Codes	City	Patrons	Worker Vehicles	All Vehicles
95110	San Jose	13,805	417	8,057	94022	Los Altos	22,233		12,284
95111	San Jose	35,537	209	19,849	94024	Los Altos	22,067		12,192
95112	San Jose	38,500	417	21,700	94035	Mountain View	100		55
95113	San Jose	453		250	94040	Mountain View	31,507	209	17,623
95116	San Jose	27,726	417	15,748	94041	Mountain View	17,257		9,534
95117	San Jose	29,991	209	16,785	94043	Mountain View	37,684	209	21,035
95118	San Jose	29,587		16,346	94085	Sunnyvale	20,577	209	11,584
95119	San Jose	8,150		4,503	94086	Sunnyvale	49,446	209	27,533
95120	San Jose	33,885		18,721	94087	Sunnyvale	49,192		27,178
95121	San Jose	26,298	209	14,744	94089	Sunnyvale	18,069		9,983
95122	San Jose	30,053	209	16,819	94301	Palo Alto	22,395		12,373
95123	San Jose	54,335		30,020	94304	Palo Alto	4,114		2,273
95124	San Jose	42,028		23,220	94305	Stanford	5,693		3,145
95125	San Jose	48,344	209	26,925	94306	Palo Alto	31,091		17,177
95126	San Jose	30,087	209	16,838	95002	Alviso	2,043		1,129
95127	San Jose	33,251		18,370	95008	Campbell	48,883	209	27,223
95128	San Jose	30,450	209	17,038	95013	Coyote	84		46
95129	San Jose	36,146		19,970	95014	Cupertino	55,329		30,568
95130	San Jose	12,189		6,734	95020	Gilroy	35,868		19,817
95131	San Jose	26,003	209	14,582	95030	Los Gatos	14,963		8,267
95132	San Jose	29,390	209	16,453	95032	Los Gatos	26,264		14,511
95133	San Jose	16,313		9,012	95035	Milpitas	54,094	626	30,531
95134	San Jose	19,347		10,689	95037	Morgan Hill	36,682		20,266
95135	San Jose	18,479		10,209	95046	SanMartin	4,203		2,322
95136	San Jose	36,798		20,330	95050	Santa Clara	35,182	209	19,653
95138	San Jose	14,199		7,845	95051	Santa Clara	56,117	209	31,219
95139	San Jose	5,756		3,180	95053	Santa Clara	271		150
95148	San Jose	28,667		15,838	95054	Santa Clara	19,273		10,648
Subtotal		755,763	3,132	420,775	95070	Saratoga	31,262		17,272
					95140	Mount Hamilton	308		170
Total Santa Clara County Zip Codes							1,508,014	5,221	838,536

Scenario C: Three Class-III Casinos: San Pablo, Sugar Bowl and Point Molate

In this scenario it is assumed that in addition to the San Pablo Casino, the Sugar Bowl Casino and Point Molate Hotel-Casino would also be open. The two extra casinos would help satisfy the unmet demand in the market. However, it would also cause a clustering effect by creating a small area of three casinos. This would actually stimulate more demand

³² Patron visits are the number of customers walking into the casino

³³ Vehicle visits include one trip to the casino and one trip from the casino

by making it a single destination with a choice of three gaming attractions. As such, in this scenario the casinos would operate near capacity.

This problem occurs because the tribes have indicated that they would only have collectively 7,000 Class-III slots. Considering there are over 4.1 million people living in the San Francisco-Oakland-Fremont MSA and about 25 percent of the adults like to gamble at casinos, 7,000 machines would not meet the demand.

In the analysis it is assumed that the Sugar Bowl Casino would have 2,000 slots. The Point Molate Casino would have 2,500 slots, plus a 400-room hotel, which was incorporated into the traffic and employment forecasts of the casino model. However, non-gaming components of the two additional casinos (retail, showrooms, and convention center) were not counted.

In total, the analysis forecast nearly \$1.6 billion in gaming revenues for the three casinos (in 2011 dollars). They would employ 7,250 workers and attract 27.8 million patron visits per year. Again, because they are pulling in mostly locals that do not have to make a special trip to visit the casinos, the average length of stay would be less than two hours. A total of 17,014,335 vehicle visits would result.

Exhibit 58: Scenario C: Revenues, Employment, and Visitor Counts in 2011

Casinos in 2011	San Pablo	Sugar Bowl	Point Molate	All Three
Casino operations:				
Gaming revenues	\$560,878,76	\$446,279,525	\$590,175,846	\$1,597,334,130
Employees (FTE's)	2,400	2,000	2,850	7,250
Individual Visitors:				
Patrons	9,847,869	7,870,844	10,101,908	27,820,621
Employees & other	593,280	494,400	704,520	1,792,200
Total	10,441,149	8,365,244	10,806,428	29,612,821
Vehicle Visits:				
Patrons	5,471,038	4,372,691	5,612,171	15,455,901
Employees & other	515,896	429,913	612,626	1,558,435
Total Vehicles	5,986,934	4,802,604	6,224,797	17,014,335

If two other casinos open in Contra Costa County, the number of vehicles visiting the San Pablo Casino from Santa Clara County would be about 70,000 fewer per year. The decline is modest, because the market overall under-supplies gaming services. Total visits would be about 768,000 vehicles at San Pablo, nearly 600,000 at the Sugar Bowl Casino, and over 800,000 at the largest property under consideration--the Point Molate Casino. See Exhibit 59, following.

Exhibit 59: Scenario C: Santa Clara County Patron & Vehicle Visits in 2011

Zip Code	City	Visits to San Pablo by			Visits to Point Molate by			Visits to Sugar Bowl by		
		Patrons	Worker Vehicles	All Vehicles	Patrons	Worker Vehicles	All Vehicles	Patrons	Worker Vehicles	All Vehicles
San Jose										
95110	San Jose	13,275	417	7,764	13,700	417	7,998	10,295	209	5,903
95111	San Jose	32,957	209	18,423	34,844	209	19,466	26,162	-	14,454
95112	San Jose	36,735	417	20,725	38,271	209	21,360	28,744	209	16,096
95113	San Jose	424	-	234	445	-	246	331	-	183
95116	San Jose	27,858	417	15,820	28,902	209	16,183	21,712	209	12,211
95117	San Jose	27,383	209	15,344	28,876	209	16,169	21,465	-	11,859
95118	San Jose	27,158	-	15,004	28,750	-	15,884	21,585	-	11,925
95119	San Jose	7,092	-	3,918	7,468	-	4,126	5,605	-	3,097
95120	San Jose	27,495	-	15,190	29,356	-	16,219	21,806	-	12,048
95121	San Jose	25,198	209	14,137	26,253	209	14,720	19,718	-	10,894
95122	San Jose	28,870	209	16,165	30,447	209	17,037	22,632	209	12,719
95123	San Jose	49,716	-	27,468	52,117	-	28,794	39,128	-	21,618
95124	San Jose	37,778	-	20,872	39,529	-	21,839	29,680	-	16,398
95125	San Jose	44,797	209	24,965	46,817	209	26,081	35,155	-	19,423
95126	San Jose	28,416	209	15,915	29,774	209	16,665	22,141	209	12,448
95127	San Jose	31,478	-	17,391	32,995	209	18,445	24,758	-	13,678
95128	San Jose	28,583	209	16,007	29,757	209	16,655	22,350	-	12,348
95129	San Jose	32,086	-	17,727	33,636	-	18,583	25,238	-	13,944
95130	San Jose	10,871	-	6,006	11,503	-	6,355	8,549	-	4,723
95131	San Jose	25,078	209	14,070	25,922	209	14,537	19,478	-	10,761
95132	San Jose	29,276	209	16,390	30,755	-	16,992	22,867	-	12,634
95133	San Jose	16,032	-	8,858	16,694	-	9,223	12,538	-	6,927
95134	San Jose	18,694	-	10,328	19,455	-	10,749	14,473	-	7,996
95135	San Jose	15,536	-	8,583	16,560	-	9,149	12,302	-	6,797
95136	San Jose	32,891	-	18,172	34,918	-	19,292	26,212	-	14,482
95138	San Jose	12,675	-	7,003	13,322	-	7,360	10,000	-	5,525
95139	San Jose	5,038	-	2,783	5,303	-	2,930	3,980	-	2,199
95148	San Jose	27,109	-	14,977	28,701	-	15,857	21,317	-	11,778
Subtotal		700,498	3,132	390,239	735,069	2,716	408,914	550,224	1,045	305,068
Others										
94022	Los Altos	19,553	-	10,803	20,403	-	11,272	15,322	-	8,465
94024	Los Altos	20,188	-	11,154	21,347	-	11,794	15,865	-	8,765
94035	Mountain View	95	-	52	100	-	55	74	-	
94040	Mountain View	29,071	209	16,277	30,633	-	16,924	22,772	-	12,581
94041	Mountain View	15,997	-	8,838	16,626	-	9,186	12,489	-	6,900
94043	Mountain View	34,306	209	19,169	35,598	-	19,667	26,742	-	14,775
94085	Sunnyvale	19,412	209	10,940	20,157	209	11,352	15,142	-	8,366
94086	Sunnyvale	45,878	209	25,562	47,773	209	26,609	35,881	-	19,824
94087	Sunnyvale	44,520	-	24,596	46,638	-	25,767	35,016	-	19,346
94089	Sunnyvale	17,196	-	9,501	17,984	-	9,936	13,512	-	7,465
94301	Palo Alto	20,023	-	11,062	20,721	-	11,448	15,569	-	8,602
94304	Palo Alto	3,631	-	2,006	3,783	-	2,090	2,843	-	1,571
94305	Stanford	4,928	-	2,723	5,211	-	2,879	3,873	-	2,140
94306	Palo Alto	27,613	-	15,256	28,626	-	15,816	21,506	-	11,882
95002	Alviso	1,976	-	1,092	2,035	-	1,124	1,529	-	845
95008	Campbell	45,273	209	25,228	47,133	209	26,255	35,401	-	19,558
95013	Coyote	71	-	39	75	-	41	56	-	
95014	Cupertino	50,869	-	28,104	53,074	-	29,322	39,857	-	22,021
95020	Gilroy	27,120	-	14,983	28,739	-	15,878	21,565	-	11,914
95030	Los Gatos	12,131	-	6,702	12,929	-	7,143	9,703	-	5,361
95032	Los Gatos	23,111	-	12,769	24,242	-	13,394	18,200	-	10,055
95035	Milpitas	53,020	626	29,937	54,352	626	30,674	40,862	417	23,005
95037	Morgan Hill	29,590	-	16,348	31,291	-	17,288	23,481	-	12,973
95046	San Martin	3,218	-	1,778	3,443	-	1,902	2,558	-	1,413
95050	Santa Clara	32,840	209	18,359	34,493	209	19,272	25,909	-	14,314
95051	Santa Clara	51,638	209	28,745	54,374	209	30,256	40,422	-	22,333
95053	Santa Clara	257	-	142	266	-	147	200	-	111
95054	Santa Clara	18,369	-	10,149	19,008	-	10,502	14,282	-	7,891
95070	Saratoga	27,802	-	15,360	29,181	-	16,122	21,907	-	12,103
95140	Mount Hamilton	178	-	98	187	-	103	141	-	
Santa Clara Zip Codes		1,380,371	5,221	768,011	1,445,491	4,387	803,132	1,082,903	1,462	599,797

Conclusions

The market is clearly large and the demand for casino gaming great. One casino with 2,500 machines or even three with 7,000 would be insufficient to satisfy demand at a level consistent with an open market where suppliers would be free to add machines as necessary.

The San Francisco-Oakland-Fremont metropolitan statistical area (MSA) is the 12th largest nationally in population and second highest in personal income. Long travel times make competing casinos difficult to access. Because of this and weak non-casino gaming competition in the area, the casinos proposed would have all the business they could handle. They would operate near their physical capacities.

Given the urban location, the analysis assumes that these casinos would function like other local casinos and appeal mostly to area workers and residents. Patrons would stay for less than two hours a visit, but go much more frequently than patrons of the typical Indian casino in California where players often have to plan for full or half-day trips. For that reason, the vehicle visit forecast is high relative to the number of gaming units and revenues.

It is important, however, to note that casinos such as these attract mostly people that would be out on the road anyway and visit casinos either by making a minor side trip or stopping at one while on their way to another destination. Effectively they would be catering to many impulse and convenience gaming visitors. The traffic impacts are going to be less than one would see for a comparably busy casino in an exurban or rural area that rely more so on destination gaming visitors that plan ahead and set aside considerable time for trips to a casino.

APPENDIX 2

Overview - West Contra Costa County Casinos

Casino San Pablo is currently operating in the City of San Pablo, in West Contra Costa County. Two other casinos are proposed nearby, one in unincorporated North Richmond and the other in the City of Richmond. The following is a brief overview of the three casinos.

Casino San Pablo – Located in the City of San Pablo, Casino San Pablo is approximately 2 blocks from the I-80 freeway. The 9.5-acre parcel was put into trust for the Lytton Band of Pomo Indians in 2000 through an act of Congress. The 71,000 square foot building (with a 45,000 square foot casino floor) was initially operated as a commercial card room. The facility was renovated and reopened on August 1, 2005 with 500 Class-II bingo-based slot machines. The facility now has 1,020 Class-II machines and over 30 gaming tables (no house banked games).³⁴ The casino reportedly employs 520 people.

In markets like San Pablo, where there are no competing Class-III slot machines, the Class-II bingo machines prove to be very popular. They are the only game in town.

A June 2006 newspaper article reported that the Class-II machines initially generated \$330 per machine per day. This compares to an average \$127 per Class-III slot machine per day in Nevada (2006 data). Recent information suggests that the Tribe is earning over \$410 a day on their machines and that they are being played more than nine hours a day.

For the average gambler, most of the time in the casino is spent at the bingo or slot machines, with only about 10% at table games. Active gambling lasts about 1.5 hours. Another 35 minutes usually spent on other activities such as parking or eating.

In July 2006, tribal representatives reported that the Lytton's earned \$110 million from the casino in its first year.³⁵ In December, 2006, the Tribe reported that 83% of their revenue came from the bingo machines³⁶ (with approximately 937 machines, as of September, 2006). Total share of revenues from machines likely increased after expansion to 1,020 machines.

In 2004, the tribe negotiated a state-tribal compact with the Governor which would have allowed operation of up to 2,500 Class-III slot machines and 63 table games. The compact was not ratified by the legislature. Nonetheless, for purposes of ECONorthwest's traffic analysis, one scenario assumes that the San Pablo Casino would be expanded to 2,500 Class-III slot machines and house-banked card gaming tables by 2011.

Sugar Bowl Casino – The Scotts Valley Band of Pomo Indians is seeking to place 29.9 acres in unincorporated North Richmond into trust. As proposed, the Sugar Bowl Casino would have 2,000 Class III slot machines, 75 table games, 16 poker tables, a 1,500-seat event

³⁴ See also Casino website <http://www.casino-sanpablo.com/casino.asp> accessed on December 29, 2006.

³⁵ Stidham, L. Legal Counsel for the Lytton Band. Testimony at the NIGC classification standards regulation consultation meeting in Ontario, California. July 27, 2006.

³⁶ Ogas, K. Letter from Lytton tribal attorney to the NIGC. December 15, 2006.

center, a 600-seat buffet, a 250-seat entertainment lounge, a 150-seat sports bar, a food court, a 120-seat restaurant, a food court and/or espresso stand and light retail shopping. There would be 3,549 parking spaces³⁷ in a 225,000 square foot building (with a 70,320 casino floor).

Point Molate Casino – The Guidiville Band of Pomo Indians is seeking to place 415 acres in the City of Richmond into trust. The proposed casino would have a 150,000 sq. ft. gaming floor with 2,500 Class III slot machines. The development would also contain 300,000 sq. ft. of retail space, 25,000 sq. ft. of convention and entertainment space, a 400-room hotel, 29 cottages to be used as suites and offices, a boutique spa/hotel, fire station, government offices, cultural center, open space, a 40 acre public park, a ferry terminal and approximately 3,600 parking spaces.³⁸

³⁷ BIA, Draft Environmental Impact Statement, Scotts Valley Band of Pomo Indians Fee-to-Trust and Gaming Development Project, page 2-5.

³⁸ Bureau of Indian Affairs. Notice of intent to prepare an environmental impact statement. Federal Register. March 11, 2005.

APPENDIX 3

Market Demand for West Contra Costa Casinos

The three West Contra County Casinos (proposed and existing) are located in the San Francisco-Oakland-Fremont metropolitan statistical area ("San Francisco MSA"). The San Francisco MSA consists of Contra Costa, Alameda, Marin, San Francisco, and San Mateo counties.

The ECONorthwest traffic analysis uses MSA economic data in assessing market demand for the casinos, including personal income, employment and consumer spending. December 2006 data from the Bureau of Economic Analysis estimates that the per capita personal income in the San Francisco MSA was \$52,050 in 2005 and that total personal income was \$219 billion.³⁹ By 2011 total personal income would reach \$292 billion, based on historical growth rates. January 2006 data from BEA is slightly lower: \$216 billion in 2005.⁴⁰ Payrolls through the third quarter of 2006, which track personal income growth closely, were up 6.5% year-over-year.⁴¹

In markets with fairly good access to gaming venues, individuals spend about 1.25% of their personal income on gambling. This would imply, that with more gaming venues, the San Francisco MSA market could generate \$3.6 billion in gaming revenue⁴² in 2011.

In a saturated market, such as Las Vegas, gaming revenues would be 3% of personal income, which in the case of the San Francisco MSA would be \$8.6 billion in 2011.

Typically, Indian casinos garner about half the gaming dollars---the rest going mostly to lotteries, charities, poker, bingo, Internet, sports betting, slot machines in bars, and out-of-state casinos. With only three casinos clustered around Richmond and California's limitations on types of games, the proposed casinos would make less than their full market potential.

Key gaming metrics of the San Francisco MSA. In 2005, about 1,052,030 individual visitors flew by air to Las Vegas from the San Francisco Bay area.⁴³ An estimated 80% of visitors gambled, spending over \$526 per gambler in the casinos in Las Vegas or about \$554 million. That equates to 8.3% of all the gaming done on the Strip and downtown Las Vegas.

In 2004, the most recent year for which data are available, an estimated 651,724 visitors from the San Francisco Bay area visited Reno.⁴⁴ About \$131 million in gaming revenues

³⁹ Personal income is the sum of wages, self-employment earnings, rental income, investment income, pensions, and other cash earnings of individuals. Estimates were used here because there is about a two-year lag in the reporting of regional personal income by the U.S. Bureau of Economic Analysis ("BEA"). For 2004, the BEA estimates personal income for the San Francisco MSA to have been \$204 billion or \$49,276 per capita (from their website accessed on December 31, 2006 at <http://www.bea.gov/bea/regional/statelocal.htm>).

⁴⁰ From BEA website accessed April 25, 2007 <http://www.bea.gov/newsreleases/regional/mpi/mpinewsrelease.htm>

⁴¹ From the Bureau of Labor Statistics website, April 25, 2007 at <http://www.bls.gov/cew/home.htm>

⁴² Gaming revenue is the difference between dollars bet and dollars won by players.

⁴³ The Las Vegas Convention and Visitors Authority. Marketing Bulletin. 2nd quarter 2006.

⁴⁴ The Reno-Sparks Convention & Visitors Authority. 2004 Marketing Statistics Report.

could be attributed to those visitors, which was about 14% of the total for Washoe County, Nevada (including Reno).

During the 2004/05 fiscal year, lottery players in the San Francisco MSA spent and lost about \$136 million on California Lottery games.⁴⁵ Given the population and wealth of the San Francisco MSA, this amount is unusually low. It reflects the weak market position of the California Lottery by San Francisco MSA residents due to their high hold rate⁴⁶ (which discourages people from playing) and lack of variety⁴⁷ (for example, no video gaming terminals like those in neighboring Oregon).

In summary, revenues generated for Las Vegas, Reno and the California Lottery indicate that the gaming market of the San Francisco MSA is well under its revenue potential. This is a consequence of the lack of gaming variety and access to gaming venues in the marketplace.

⁴⁵ California Lottery. Fiscal year 2004/05 California Lottery Report to the Public.

⁴⁶ Hold rate is the share of every dollar played that a player can expect to lose. The California Lottery's hold rate was 46.15% in 2005, compared with Oregon at 33.85% (for traditional lottery games) and Washington, at 34.53% (for scratch tickets).

⁴⁷ Indian casinos in California cannot offer keno, sports betting, and non-card table games (although some modifications of this restriction are happening).

APPENDIX 4

Characteristics of “Locals” Casinos

The casino industry uses the term “locals” casino to describe a casino whose customers overwhelmingly come from the local area, which is usually urban. “Locals” Casinos are distinguished from Standalone Tourist and Destination Casinos in several respects:

- Customer visits tend to be opportunistic and short – At “non-local” casinos, customers stay on average about four hours and actively gamble for nearly three. A “locals” play time is much less and ancillary to other activities. For example, some players will drop in and visit during a shopping trip. Others will stop in on their way home from work. As such, most of the trips are pass-by. A “locals” casino generates less new traffic than a standalone tourist or non-locals casino with a similar draw.
- Regular Customers are the Norm – “Locals” see the same customers on a regular basis. To retain their customer base, they minimize bad gambling experiences by setting low hold rates and wagering limits. They emphasize friendly service, provide generous complementaries and offer good, but basic inexpensive food and drinks. They will offer heavily advertised specials in local papers.
- Gaming, not amenities, draw customers – Visits to “locals” casinos are also driven more by gaming than amenities. In urban areas, people have a wide choice of dining and entertainment options away from home and, since most “locals” casino patrons live close by, they have ample at-home eating and entertainment options. Therefore, the length of visits to these casinos are shorter than to more distant ones and vehicles come in and out of parking with more frequency. Indeed, with the exception of child-friendly activities, extensive entertainment and fine dining amenities could discourage active players at a “locals” casino, if non-gamers filled the available parking spaces.
- Facilities focus on gaming and family friendly activities. To help overcome their inconvenient locations and stigma associated with gambling, “non-locals” casinos usually offer something special to customers: elaborate entertainment venues, conference centers, upscale shopping or hotel rooms. Inconvenience is not an issue for a “locals” casino. Dining tends towards the more pedestrian style fare. Non-gaming entertainment is usually oriented towards activities for family members who do not gamble. Thus, “locals” casinos may include bowling alleys, movie theaters, childcare, or arcades.

In its traffic analysis, ECONorthwest assumes that the three West Contra Costa County Casinos will open as “locals” casinos or evolve into them over time.

APPENDIX 5

Class-II Bingo “Slot” Machines Compared to Class-III Slot Machines

The distinction between classes of gaming is significant because of the different levels of regulation and control by tribes, states and the federal government.

The Class-I category includes social and traditional tribal games of nominal consequence. Neither the federal nor state governments can exercise any authority over these games.

The Class-II category was designed to cover bingo games, which historically has been widely offered on reservations. By law, Class-II games are bingo or lotto games, whether or not electronic, computer, or other technological aids are used and where there are at least two players. Non-banking card games, like poker, and certain pull-tab and other like games available in a bingo hall are also defined as Class-II.

As long as a state does not prohibit bingo, states have no authority over Class-II gaming on Indian trust lands. The logic is that since states regulate bingo and tribal governments have authorities similar to state governments, then tribes should be able to set their own rules and regulations regarding Class-II games. However, the federal government does have the right to regulate Class-II gaming.

The Class-III category includes all games other than Class-I or Class-II games: parimutuel betting on horses; house-banked tables games, such as craps and blackjack; and slot machines (which are defined by the federal Johnson Act). Class-III is a designation for many of the types of games one would normally see in a Las Vegas casino.

Tribes must negotiate an agreement (compact) with the governor of the state to operate Class-III games on trust land. The State-Tribal Compact governs the number, type and operation of Class-III games. In California, for example, current compacts allow blackjack, but not craps and roulette. State-Tribal Compacts may also allow for state regulatory oversight of tribal casino operations. Some compacts also include revenue sharing provisions to mitigate the off-reservation impacts of the casinos (such as increased traffic).

While operation of Class-II machines relieves a tribe from the need for a state-tribal compact or regulatory oversight by a state, the most popular casino games have historically been Class-III games.

Class-II Bingo “Slot” Machines – For the player, the difference between Class-II bingo machines and Class-III slot machines has become less and less in recent years. Multimedia Games introduced the first networked bingo machines in 1995. Called Mega Mania, these electronic bingo machines looked like terminals with real bingo games. Bingo cards would appear on the screens after the player pressed a button. The player would then have to press one or two more times to complete daubing the virtual cards. When the game ended, the machines would announce the winner with messages like "\$100 won at Bristow Indian Bingo in Bristow, Oklahoma" appearing at the bottom of the screen.

Mega Mania games linked players from many casinos into a common bingo game, albeit conducted in a computer tied to hundreds of player terminals. The bingo numbers were called electronically by computer and the computer determined the winner. By linking many players, tribes with only a few customers could offer bingo games with good prize money. Since a game took only about a minute, more games could be played, and more revenue generated. It also allowed for 24-hour play.

Increasingly Class-II bingo “slot” machines look and play like regular Class-III video slot machines. The technical features of these machines that keep them within the Class-II category are often invisible to the players. Machines have many of the common slot game titles with symbols, not bingo cards, dominating their displays. Multiple virtual bingo games allow for bonus rounds and other slot-like features. “Auto-daub” terminals work with only one press of a button per game so that players no longer need to press buttons two or three times a game to complete each game. A video screen displays spinning reels of symbols that soon stop, highlighting either a win or loss. On most machines there is an image of a bingo card in the corner of the screen or, as at San Pablo, on a small second screen. Play is rapid. Some players have no inkling that they are playing bingo.

San Pablo’s Class-II bingo machines have a rapid play cycle; four to six seconds per game, although players must press three buttons to complete a game. A small second screen displays the bingo card. Spinning wheels that mimic a video slot machine indicate a “win” or “loss.”

Technically, when a player presses the button on a Class-II bingo-based slot machine, they get a “virtual” bingo game card. A centralized computer, which may be in Oklahoma for example, will randomly select bingo numbers and quickly determine which cards have a pattern counted as winners and which are losers. Prizes are paid according to the patterns. The system transmits these results to casinos around the country.

Class-II games require a network of terminals which affects revenue distribution. The operator of the network, for example IGT or Metromedia Games, gets a percentage of the play off the top to cover their costs and earn a return. The casino keeps the rest after paying players. A casino large enough can run the virtual bingo games itself and keep the network to just its own floor. For that to work, there has to be a sufficient number of machines being played at the same time.

Use of Class-II Machines. In most cases, tribes put Class-II machines on their casino floors only when a state prohibits regular slots or the tribe has reached its cap on the number of video slot machines allowed under their compact. The Lytton Indians have the only 100 percent Class-II casino in California. As of 2005, six other casinos in the State had a mix. In all cases the bingo machines were installed because of prohibitions on adding any more Class-III units. Currently there are 4,190 bingo machines in California and about 57,780 Class-III machines.⁴⁸

⁴⁸ Meister, A. The potential economic impact of proposed changes to Class-II gaming regulation. NICC. November 3, 2006. Pages 24 and 25.

Class-II machines simply are not as popular as Class-III slots. On average they earn about 62% of what a slot would make in the same casino under typical conditions, although this can vary greatly depending on local conditions, the play characteristics of the machines, and how the casino functions.

Furthermore, because they often have higher hold rates, the adjusted usage rate of Class-II machines is about half of slots. Usage rate is the percent of machines in play at any given moment. It is this statistic, not gaming revenues or positions, that is most correlated with casino attendance and, indirectly, traffic.

ECONorthwest's experience with Class-II Machines – ECONorthwest reported that for all but one casino that it has worked with that have both Class-II and Class-III machines, the Class-II units do less business. This is mostly because Class-II machines are more cumbersome to play and usually have had higher hold rates. Furthermore, the games tend to be less interesting and play a little slower. There is also less flexibility in the amount of money players can put on each game. As such, when offered a choice, players usually gravitate to the Class-III machines.

One tribe reported to ECONorthwest that they had to mix Class-II machines in amongst Class-III slots so that the bingo machines would make more money. Otherwise, Class-II machines were played so infrequently that their area looked deserted. Even when mixed, action on the Class-II units was one-third of the action on the Class-III slots.

At another casino on a busy Saturday, ECONorthwest reported that 41% of the Class-II machines being played compared to 66% of the Class-III machines. This equates to 38% less action.

The only tribe ECONorthwest is aware of that gets more play on Class-II machines is the Stillaguamish Tribe which operates Angel of the Winds, a small casino north of Seattle. This performance in part reflects peculiarities of the Washington state market. In Washington, the Class-III machines have features similar to bingo machines. For instance, players have to press spin twice, the machines are a bit slower, and they do not accept cash, only tickets. The tribe attributes the strength of their Class-II units to their location on the floor and the highly restrictive rules on the Washington style Class-III machines. They also note that they would like to have more Class-III machines, but have reached the maximum number allowed under current arrangements.