



Exhibit IX.A.4. - Housing

Submit as Exhibit IX.A.4. an assessment of the likely impact on the housing stock in each Host Municipality and nearby municipalities resulting from the new jobs the Gaming Facility provides, and the Applicant's plans and commitments to remedy or mitigate any negative impacts. Provide copies of any contracts, agreements or other understandings evidencing such mitigation commitments.

Please see the attached Exhibit IX.A.4. - Housing Impact report prepared by Global Gaming & Hospitality, LLC, Morowitz Gaming Advisors LLC and Leisure Dynamics Research, LLC.

Exhibit IX.A.4 – Housing Impact

Located in:

Nichols, New York

Prepared For:

Tioga Downs Racetrack, LLC

Prepared By:

Global Gaming & Hospitality, LLC

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Morowitz Gaming Advisors, LLC

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Leisure Dynamics Research, LLC

June 21, 2015

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Housing Impact

There are approximately 22,200 housing units in Tioga County, according to the U.S. Census 2008-2012 American Community Survey. Global Gaming and Hospitality ("GGH") projected a staffing level of approximately 1,117 persons in the Average case once the Tioga Downs casino resort is operational, including on-site employees of third party vendors. However, there are already approximately 555 employees at the property, such that this would represent approximately 558 incremental positions. Given that the property is already an established gaming venue with much of the management in place, based on GGH's staffing projections we estimate that between 5 percent and 7 percent of the incremental employees will move into the area for the purpose of resort employment, or approximately 30 to 40 persons. Some of the people that move to the area may move to places other than Tioga County, most likely either in the Southern Tier or across the border in Pennsylvania. Some of these residents would occupy newly built homes and apartments, while others would be purchasing or renting homes and apartments of those that are moving out of the area.

If 40 employees move to Tioga County, their housing demand would reflect less than 0.2 percent of the 2012 county housing stock. Thus, if the new employees move to surrounding counties as well, the impact would be even more imperceptible. As a result, we envision no impact to the housing stock other than to support the balance of supply and demand in the market, given the outward population migration the region has experienced over the past decade. There is therefore no justification for mitigation relating to housing stock issues.